

Strategic Voting in the United States

Barry C. Burden
burden@fas.harvard.edu

Philip Edward Jones
pjones@fas.harvard.edu

Harvard University
Department of Government
1737 Cambridge Street
Cambridge, MA 02138

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Because of America's strong two-party system, strategic voting is thought to be less consequential in the U.S. than in most democracies. As Downs (1957, 148) put it, "...rational voting in a multi-party system is both more difficult and more important than in a two-party system." The act of voting in the U.S. is thus simpler and more sincere than in other democracies. We contend that this conventional wisdom is in need of modification.

We concede that sincere voting is always the dominant strategy in an election with just two alternatives. And we agree that two-party competition is more common in the U.S. than just about any other democratic nation. But that is where the simplicity of the American system ends.

To act strategically, voters must have the opportunity, ability and motivation to do so. Although we have little to say about cross-national differences in ability and motivation, we argue that Americans in fact have many more *opportunities* for strategic behavior than voters in other nations.

We conceive of the number of strategic voting opportunities as a function of various institutional and electoral factors. The opportunity to vote strategically increases with the number of elections held, the number of parties and candidates contesting each election, the sequencing of elections, and the number of separately-elected officials who must work together to make policy. American elections appear at first to offer partisan choices to voters. But once we consider each of the factors affecting strategic opportunities, it also becomes apparent that the U.S. system offers voters more chances to act strategically than in other countries.

The sheer frequency with which citizens may vote has already been noted, but few have pointed out that this also multiplies the opportunities for strategic voting. Consider voters living in Jacksonville, Florida in 2004. These voters could have chosen among candidates for 10 offices and one referendum in the August primary election. In the general election three months later, these same voters would have faced 19 candidate elections and a dozen constitutional amendments. Offices ranged from president to county commissioner and judges at various levels, many of which featured multiple candidates. Simply by virtue of the large number of elections held, voters have more opportunities to act strategically. In this paper, we investigate three additional features more or less unique to the American electoral system that increase the opportunity for strategic voting.

First, strategic considerations are operative whenever a third party candidate appears in a general election. Although minor parties seldom *win* in the U.S., they appear on the ballot much more often than is commonly recognized. The presence of the Electoral College and threshold requirements for receiving public funding only heighten these considerations.

Second, primary elections, an almost uniquely American device for nominating party candidates, frequently feature multiple candidates. This is especially true in presidential primaries where as many as ten strong candidates seek a party's nomination. Because candidates for nearly every office must win primaries, this effectively doubles the number of elections in which strategic voting could occur. The sequential nature of presidential primaries also increases the opportunity to vote strategically, as voters' first choice candidates are shown to be less viable or electable as the contest unfolds.

Third, presidentialism and federalism create opportunities for strategic decisions *across* offices. Voters who care about policy outcomes must anticipate the many combinations of parties in the presidency, Congress, governorship, state legislature, mayor's office, and other positions. These voters might wish to balance these competing offices by voting strategically for different parties in each office.

Finally, we also note that there are frequently other types of elections in which strategic voting is encouraged. These include run-off primaries used in the American South, the wide open “jungle” primary used in Louisiana, the blanket primary experiment in California, and the 2003 California recall featuring over 100 candidates for governor.

Although the U.S. does not have an institutionalized and regularly viable third party like other countries, this does not mean that the opportunity to vote strategically is nonexistent. We begin this paper by showing that third party candidates do compete regularly for elected office, and continue by arguing that factors beyond just the number of political parties affect the opportunity people have to cast a strategic vote.

General Elections

The winner-take-all system used in most U.S. elections renders strategic voting useless when only two candidates are running. But the calculus changes as soon as a third party candidate enters. If the expected vote shares of the Democratic and Republican nominees are close, then even a third party candidate with a small amount of support has the potential to change the outcome.¹ State ballot access rules are critical in shaping the likelihood that minor party candidates will emerge (Rosenstone, Behr, and Lazarus 1996). Take the 2004 presidential election as an example. In Oklahoma, where over 35,000 signatures must be collected by mid-summer to earn access, there were no minor party candidates on the presidential ballot. But in Colorado, where just a small fee or 1,000 signatures are adequate, ten presidential candidates appeared alongside Bush and Kerry. Nationwide no fewer than sixteen parties appeared on at least one state ballot in 2004.

The variability across states is also true at the subpresidential level. Table 1 reports the number of elections for the House of Representatives, Senate, and governorships in which at least three candidates were on the ballot in three recent election years. It is striking that for all three offices a majority of races provided opportunities for strategic action. More than 80% of Senate and gubernatorial races featured multicandidate competition. While many of these minor party and independent candidates were unlikely to win, a close election makes even the smallest of competitors relevant.

Table 1. General Elections Featuring Three or More Candidates (1998-2002)

Office	Number	Percentage
House	752 out of 1305	57.6
Senate	83 out of 102	81.4
Governor	69 out of 80	86.3
Total	904 out of 1487	60.8%

Note: Data include even year elections only.
Some odd year gubernatorial elections omitted.

¹ Although we use the terms “third party” and “minor party” interchangeably, minor party is a more accurate label since often more than three parties are involved. In the 2004 presidential election, for example, Libertarian, Constitution, Green, and other party candidates appeared on many ballots and earned nearly as many votes as “third” party candidate Nader did.

At the presidential level, however, third party candidates have emerged regularly to compete against the Democrats and Republicans. Strom Thurmond (1948), George Wallace (1968), John Anderson (1980), Ross Perot (1992 and 1996) and Ralph Nader (2000 and 2004) all received sustained media attention and votes, even if they ultimately lost. The Electoral College adds another wrinkle to Duverger’s logic. American presidents are formally chosen by electors, who are largely chosen by winner-take-all rules within each state.² The nationwide popular vote has no direct bearing on who wins. The twist added by the Electoral College is thus that voters must consider both the closeness of the major-party vote in their states and the likely electoral vote nationwide.

It is surprising, then, that the most comprehensive academic treatment of third party voting in America devotes no more than a few sentences in a 300-page book to strategic voting (Rosenstone, Behr, and Lazarus 1996). As Burden (2005b, 604) puts it, “Despite its importance, political scientists know relatively little about the prevalence or causes of strategic voting in the U.S.” Let us consider to what extent voters take advantage of the strategic opportunities available to them.

As a preliminary exploration, Table 2 shows the degree to which voters in the 1992 presidential election considered voting for other candidates using data from the National Election Study (NES). This is determined by first asking respondents for whom they voted. For a respondent who chose independent H. Ross Perot, the follow-up question asks, “Was there ever a time when you thought you were going to vote for Clinton or Bush? Which one?” The table shows that while many voters considered other candidates, this was much more likely among Perot voters. The strategic considerations that surround a vote for Perot should cause many of his supporters to waver over the course of the campaign as the expected outcome changes. Indeed, only a quarter of Perot voters failed to consider other candidates while more than half of George H.W. Bush and Bill Clinton’s voters did.

Table 2. Consideration of Other Presidential Candidates by Vote Choice (1992)

		Final Vote Choice		
		Bush	Clinton	Perot
Other Candidates Considered	Bush	--	10%	37%
	Clinton	10%	--	34%
	Perot	28%	31%	--
	Both Others	3%	3%	6%
	No Others	59%	55%	23%
		560	786	312

Source: 1992 National Election Study.

Extending Alvarez and Nagler’s analysis of the 1992 presidential election, Lacy and Burden (1999) argue that third party candidates are often able to increase voter turnout by mobilizing citizens who would otherwise abstain (see also Magee 2003; Southwell 2004). Burden (2003) extends these ideas by distinguishing between “direct” turnout effects caused by supporters of the third party candidate turning out and “indirect” turnout effects whereby the third party candidate’s presence mobilizes supporters of the major party candidates to vote. In the 2000 election these authors find that without Nader on the ballot, perhaps a third of his

² Nebraska and Maine. Also DC.

supporters would have abstained. The remainder would have gone to Gore by a two to one margin. This is what Lacy and Burden (1999) refer to as a “vote-stealing effect.” This effect in 2000 would have been enough to put Florida in the Democratic column and change the outcome of the election (Burden 2003; Magee 2003). In their study of the 1968 election, Converse et al. (1969) estimate that more of George Wallace’s voters would have gone to Richard Nixon than Hubert Humphrey. Wallace’s presence made the election closer than it otherwise would have been.

These effects are in some ways the other side of the strategic behavior equation, reasons for rather than against supporting a third party. The Lacy and Burden approach asks *from* where minor party candidates draw their votes while the traditional focus on strategic votes asks *to* where their supporters go. Since the Lacy and Burden approach asks counterfactual, “what if?” questions, assessing simple strategic voting behavior should be easier.

Abramson et al. (1995) point out that the ideal survey-based measure of strategic voting requires both evaluations of the candidates (often through “feeling thermometers”) and assessments of each candidate’s chances of victory (Blais and Nadeau 1996). The latter are frequently absent, however, so that “candidate thermometer scores provide important indirect evidence about problems facing third-party and independent candidates” (360). We compute rankings among those who ranked all three candidates of interest and for whom the most preferred candidate is not tied with another, using the post-election wave of the survey.

Table 3 considers the 2000 presidential election as an example. Using candidate feeling thermometers to create preference rankings, we observe that well over 90% of those who preferred Democrat Al Gore and Republican George W. Bush report voting for those candidates. But only about one in five of those who preferred Nader voted for him. The remainder split between the other two candidates, with somewhat more going to Gore.³

Table 3. Ranking and Vote Choice in 2000

		Preferred Candidate		
		Bush	Gore	Nader
Actual Vote	Bush	95%	7%	23%
	Gore	5%	93%	59%
	Nader	1%	0%	19%
	N	357	344	133

Source: 2000 National Election Study. Ties omitted. Totals may not add to 100% due to rounding.

We also see that 133 out of 834 voters ranked Nader first, suggesting that 16% of the active electorate favored Nader. But only 19% of those Naderites actually voted for him. Thus, the strategic voting rate among Nader supporters was 81%, which represents a surprising 13% of the electorate (81% × 16%). In Table 4 we repeat this calculation for each of the presidential elections in the NES time series in which there was a substantial minor party candidate. These data mirror what researchers using the same technique have found elsewhere (Abramson et al. 1995; Burden 2003).

There are two lessons to take from these results. First, the overall levels of strategic voting are comparable to those found in other non-presidential SMD systems such as Canada and the U.K. (Blais, Dostie-Goulet, and Bodet 2006; Gschwend 2005). The range among the full

³ Many Nader supporters also abstained (Burden 2003).

electorate is from 2% in 1968 to 13% in 2000. Second, across these five cases it appears that strategic voting among increased almost monotonically (aside from Perot’s second run in 1996). This upward trend transcends a great deal of variety among candidates in terms of votes earned, ideological positions, and potential impact on the election outcome. Some might go so far as to call this learning on the part of voters based on experience with multiple third party campaigns over the years.

Table 4. Strategic Voting among Minor Party Supporters

Candidate (Party)	Year	Among Supporters	In Full Electorate
George Wallace (American Independent)	1968	16%	2%
John Anderson (Independent)	1980	43%	6%
H. Ross Perot (Independent)	1992	21%	4%
H. Ross Perot (Reform)	1996	55%	7%
Ralph Nader (Green)	2000	81%	13%

Source: National Election Studies.

It is also possible that strategic voting can help rather than harm a minor party candidate. If the major party race is lopsided enough, this effectively frees up voters who are sympathetic to the third party to do as they please without fear of affecting the election result. This has been called “expressive” or “inverse tactical” voting (Tsebelis 1986). Burden (2005b) shows that Nader benefited from expressive strategic voting in 2000 in states where the outcome was a forgone conclusion. Ironically, insincere voting can sometimes boost a third party candidate’s vote share.

The other factor that may improve a third party’s support is a threshold. In proportional electoral systems, a threshold determines the minimum share of the vote required for representation in the legislature. Sympathetic voters might vote more for a small party if it is jeopardy of falling just below the minimum. Looking primarily at the German case, Cox (1997) refers to this form of strategic voting as “threshold insurance.” A heretofore unappreciated threshold in the U.S. concerns standards set by the Federal Elections Commission (FEC) for earning federal matching funds. Specifically, a minor party must earn 5% of the popular vote to be eligible for public funding in the next presidential election. In 2000, Nader pursued a “5% strategy” so that his Green Party could benefit from the rule (Burden 2005a). Although eventually shut down by authorities, online “Nader trader” sites emerged to allow Nader supporters in “safe” states to trade their votes with others in battleground states. This might have allowed Nader to reach the 5% threshold without jeopardizing the election.

Primary Elections

General elections are by no means the only opportunity for Americans to cast a vote, whether strategic or not. Party nominees for almost every elected office are chosen by some form of public vote. Primaries are thus a crucial feature of the American electoral landscape. Indeed, in many districts with little competition between the parties at the general election, the real choice occurs in the primary (Key 1949). Much of the research that has been conducted in this area concerns presidential nominations (Norrander 1996) and we focus on this when

summarizing previous findings. At the same time, we acknowledge that primary elections are held at almost every level, not just for presidential nominations. In at least three respects primaries multiply the opportunities for strategic voting.

First, primaries regularly feature multiple candidates. Table 5 shows the number of primary contests that featured three or more candidates in 1998, 2000 and 2002, disaggregated by the office on the ballot. Across the three election cycles studied, around one in ten House primaries, three in ten Senate primaries, and four in ten gubernatorial primaries featured more than two candidates.

Table 5. Number of Major Party Primaries Featuring Three or More Candidates

	1998	2000	2002
U.S. House	96 (870) 11%	87 (870) 10%	97 (870) 11%
U.S. Senate	21 (68) 31%	21 (68) 31%	16 (68) 24%
Governor	30 (72) 42%	6 (22) 27%	38 (66) 58%

Note: Total number of primaries shown in parentheses.

Second, primaries are intra-party contests, rendering heuristics like party affiliation of little use to voters. Since candidates must differentiate themselves other than with their party labels, voters may be encouraged to evaluate them in ideological terms (Kenney and Rice 1992; Monardi 1994; Norrander 1986; Wattier 1983).⁴ When these sorts of instrumental concerns are made salient, strategic voting is more likely to occur.

Finally, the characteristics of those who participate in primaries also increase the probability they will cast a strategic vote. Primary voters tend to be older, more politically sophisticated, more informed about the campaign, and more interested in politics (Bartels 1988, Ranney and Epstein 1966, Norrander 1986, 1991, Geer 1988, Nownes 1992).

Direct primaries thus offer the potential for widespread strategic voting: multiple candidates, no simple cues to differentiate them, and an electorate more capable of casting a sophisticated vote. As with multi-candidate general elections, primary voters may use evaluations of candidates and perceptions of their ability to win the nomination when casting their vote (Abramson, Aldrich, Paolino and Rohde 1992). Primary voters avoid “wasting” their vote in the same way that voters in other multi-candidate races do.

As in the case of third party voting, differentiating voters’ evaluations of candidates and perceptions of their ability to win the nomination is difficult, however: a voter’s most-preferred candidate is often also viewed as the most likely to win (Bartels 1985). Abramowitz (1987), Bartels (1987) and Brady and Johnston (1987) all find similar effects in the 1984 Democratic

⁴ These research findings are contested: Geer (1989), Marshall (1981) and Stone, Rapoport and Abramowitz (1992) argue that few primary voters can place themselves or candidates on an ideological scale, and many who can perceive few differences between candidates’ ideologies.

primaries: assessments of Walter Mondale and Gary Hart's relative chances of winning the nomination affected voters' evaluations of those candidates.

The primary system allows for two further strategic considerations to enter the vote decision. First, voters may also take into account each candidate's "electability" – the probability that they will win the general election. Second, voters may act in an even more strategic manner by choosing *which party's* primary to vote in, as well as which candidate to support.

Electability

A primary vote can be "wasted" in two ways: by choosing a candidate who can not win the nomination, or by choosing a candidate who cannot win the general election.

Although party activists are often characterized as ideologically-motivated "purists" who pull candidates away from the center of politics (Polsby and Wildavsky 1980; Aldrich 1995; Fiorina 2005), primary voters also care about the probability that a candidate has of winning the election if nominated. Stone and Abramowitz (1983), for example, find that delegates to the party conventions in 1980 actually weighed perceptions of electability *more* heavily than ideology in choosing a presidential candidate. Even activists solely seeking policy benefits know that their candidate must win both the primary and general elections in order to distribute these benefits. Voters thus follow an expected utility model, discounting ideological preferences by the perceived chances each candidate has of gaining office (Aldrich 1980; Stone 1982; Stone, Rapoport, and Abramowitz 1992).

Estimates of the numbers of voters who act strategically (by choosing a more viable or more electable candidate than their first choice) in any given primary vary somewhat: 18% in the 1984 Democratic presidential primaries (Southwell 1989), 13% in the 1988 presidential primaries (Abramson et al. 1992), and 18% in the 1988 Super Tuesday primaries (Southwell 1991).

Although not a majority, these voters may still have an impact on the nomination process. Presidential primaries consist of a series of sequential elections over several months – and earlier contests may affect the voting calculus that later participants use. The outcomes of previous primaries can affect perceptions of candidates' electability and viability (Abramowitz 1987; 1989). Voters faced with limited information about who is most likely to win often rely on cues from previous primary elections (Bartels 1988; Fey 1997; Morton and Williams 2001). These cues are not simply who won the largest percentage of the vote: media interpretations of primary outcomes (Keeter and Zukin 1983) or increased news coverage (Patterson 1980) can affect voters' perceptions. Small amounts of strategic voting in early primaries can therefore affect the calculus of a strategic voter's decision in later primaries (Gurian 1990). Aside from presidential runoff elections in some countries, this dynamic of sequential elections on strategic voting is unique to the U.S. system.

Crossover Voting

Some primary elections also allow voters to act in an even more strategic manner. Wisconsin's historic primary laws, for example, allow *any* registered voter to participate in any party's primary just by showing up on election day. Republicans may choose to participate in Democratic primaries, and Democrats may choose to vote in Republican primaries. Having a

sincere preference for one party’s candidate in the general election, “raiders” may enter the opposing party’s primary to vote for a weaker candidate to face their preferred choice in the fall (Chen and Yang 2002, Cherry and Kroll 2003). Strategic voting in this sense has two steps: the decision to vote in the primary of the party opposing their preferred general election candidate (here, “crossover voting”), and the decision to vote for the least electable candidate in this primary.

The rules determining who may participate in a party’s primary differ by state. To first show how much crossover voting is possible, we use data that codes each primary according to how “open” it is to voters from another party. *Purely closed* primaries allow only registered party members to participate while *semi-closed* primaries allow registered party members and independents to vote. *Purely open* primaries allow voters with any party registration to choose privately which party’s contest they wish to vote in, while *semi-open* primaries act in the same way, but require some public declaration by the voter as to which primary they will vote in.⁵

Some states have participation rules that do not fit this typology; we discuss these in more detail later in the paper. As Table 6 shows, a substantial proportion of primary voters in 2002 were given the opportunity to cross over and vote for the nominee of a party they were not registered with.

Table 6. Laws Governing Primary Participation, 2002

	U.S. House	U.S. Senate	Governor
Purely closed	124 29%	7 21%	12 36%
Semi closed	53 12%	9 26%	4 12%
Semi open	151 35%	13 38%	4 12%
Purely open	38 9%	4 12%	6 18%
Others	69 16%	1 3%	1 3%

In Table 7, we present previous researchers’ estimates of how many primary voters take these opportunities to participate and vote strategically. Our meta-analysis shows estimates of the proportion of primary voters who are crossovers in two senses: first, only those who identify with a party other than the one whose primary they participate in (“crossover partisans”); and second all those who do not identify with the party of the primary they voted in (“all crossover voters,” which includes independents).

Where possible, we also show the number of potential “negative strategic voters” (Southwell 1989; 1991). These are crossover voters who do not expect to vote for the party’s candidate in the general election. In particular, fears of crossover voters “raiding” primaries

⁵ For additional discussion, see several of the chapters in Galderisi, Ezra, and Lyons (2001).

assume that these voters choose the weakest (least electable) candidate for their preferred general election candidate to face.

Table 7. Percentage of Primary Voters Who Vote Strategically

	Year	Primary	Crossover Partisans	All Crossover Voters	Negative Strategic Voters
Raney and Epstein 1966	1964	Wisconsin governor	6.2%		
Adamany 1976	1964	Wisconsin president	15.6%	24.6%	
	1968	Wisconsin president	12.4%	23.2%	
	1972	Wisconsin president	16.7%	27.1%	
Hedlund et al. 1982	1976	California president	5.0%	29.0%	
	1976	Florida president	6.0%	31.0%	
	1976	Pennsylvania president	3.0%	29.0%	
Abramowitz et al. 1981	1976	Virginia governor	20.0%		10.0%
Hedlund 1977-78	1976	Wisconsin president	6.0%	44.0%	
Hedlund et al. 1982	1976	Wisconsin president	9.0%	43.0%	
	1980	Florida president	4.0%	29.0%	
	1980	Pennsylvania president	3.0%	25.0%	
	1980	Wisconsin president	11.0%	49.0%	
Southwell 1989	1984	Presidential primaries	3.6%	26.9%	8.5%
Hedlund and Watts 1986	1984	Wisconsin president	8.0%	43.0%	2.0%
Norrander 1991	1988	Super Tuesday	14.0%	18.0%	
Southwell 1991	1988	Super Tuesday			4.3%

Crossover voters make up a substantial proportion of primary voters, ranging from 18% in the Super Tuesday presidential primaries of 1988 to 49% in the Wisconsin 1980 presidential primary. However, there is little evidence that these “crossover” voters deliberately choose the weakest candidate in the other party’s primary to benefit their party’s candidate in the general election. Instead of “raiding” the primary, crossover voters choose the candidate closest to their own ideological positions. This dynamic provided Senator John McCain with additional votes in the 2000 New Hampshire presidential primary as moderate Democrats and Independents crossed-over to support him. Once they have decided to vote in the opposing party’s primary, these potentially strategic participants cast a sincere vote (Abramowitz , McGlennon, and Rapoport 1981; Adamany 1976; Hedlund 1977-78; Hedlund, Watts, and Hedge 1982; Norrander 1991; Southwell 1989). Indeed, if a strong party nominee is one who can appeal to independent and opposing partisans in the general election, then widespread crossover voting may strengthen – not weaken – the party’s chances in November.⁶

The direct primary thus offers voters a large number of opportunities and ways to act strategically. Although we stress how widespread these opportunities are, we return later in the

⁶ Cross-over voting can also affect other races down the ballot (Hedlund and Watts 1986; Norrander 1991).

paper to some more unique rules that allow for strategic voting. First we turn to the effects the institutional context of U.S. policymaking has on strategic behavior.

Strategic Balancing

Federalism and the separation of powers in the U.S. multiply the settings in which strategic voting can take place. Policy outcomes are the result of the actions of multiple politicians holding different offices. A truly instrumental voter ought to think not only about who her representative is but about the overall configuration of preferences represented in government. A policy-oriented voter should thus consider the outcome of presidential and congressional elections simultaneously.

Limiting ourselves to presidential and congressional elections, all that is required for this opportunity is that at least one of the elections is contested. In the postwar era roughly 90% of House elections were contested (Wrighton and Squire 1997). As a consequence, in contrast to the other settings we have considered, the opportunities for strategic behavior are most plentiful when it comes to cross-office balancing. At the same time, the sophistication required is greater because of the counterintuitive role played by ideology in balancing. This steep learning curve works against the other two factors driving strategic voting – ability and motivation – and might therefore dampen the effects of opportunity.

Fiorina’s “policy balancing” approach hypothesizes that moderate voters would prefer to have the legislative and executive branches under the control of different parties rather than have single party control of government. Under divided government, parties with opposing ideologies are forced to compromise, resulting in policy outcomes closer to the median voter’s ideal point. That moderate voters are more likely to split their tickets is thus consistent with the theory but not proof of it since many theories, such as those emphasizing the importance of party identification, make the same prediction (Burden and Kimball 2002; Jacobson 1990; Wattenberg 1998).

An important prediction, which Fiorina calls the “most important point” of balancing theory, is that party polarization will increase strategic ticket splitting. This helps to separate balancing from models that allow for split-ticket voting to be sincere rather than strategic (Frymer, Kim, and Bimes 1997; Grofman et al. 2000). The balancing model thus has two predictions: the necessary but insufficient condition that moderates split their tickets more than extremists, and the critical corollary that polarization heightens ticket splitting.

Tests of the balancing model have yielded mixed results. Simply measuring the degree of split-ticket-voting, which ranges from 12% to 30% in modern presidential elections and may run as high as 40% when multiple levels of government are considered (Converse and Miller 1957) does not provide evidence one way or the other. Several articles find support for the polarization corollary, but each does so only after modifying Fiorina’s original conceptualization in some fundamental way such as introducing nonseparable preferences or voter coordination (Lacy and Paolino 1998; Lewis-Beck and Nadeau 2004; Mebane 2000; Smith et al. 1999).

While some studies find no relationship between polarization and split-ticket voting (Alvarez and Schousen 1993), most analyses find just the opposite of the polarization corollary: split ticket voting actually decreases as the parties polarize (Born 1994; 2000; Brunell and Grofman 2006; Burden and Kimball 2000; Kimball 2004; Garand and Licthl 2000; Geer et al. 2004; Mattei and Howes 2000; Soss and Canon 1995). Such a negative finding is not especially surprising since balancing requires much more of voters than other forms of strategic voting.

They must understand either federalism or separation of powers, be able to locate themselves and candidates on the same ideological continuum, and reason from election outcomes to policy outcomes.

Here we briefly update and expand this literature to further test the polarization corollary. Table 8 begins by simply correlating split-ticket voting with perceived distances between the parties using individual level data from the 2000 National Election Study. Ticket splitting is considered in three ways: RD splitting, DR splitting, or both of these directions.⁷ To be as generous as possible to balancing theory, we measure party polarization in five ways using the seven-point ideological placement questions: general distance between the parties, distance between presidential candidates George Bush and Al Gore, distance between House candidates running in a district, distance between Bush and the Democratic House candidate, and distance between Gore and the Republican House candidate. The results provide no support for strategic balancing. All fifteen of the correlations are negative and eight of them are statistically significant at conventional levels. To the degree that voters are considering ideology at all, it appears to be in relation to the House candidate from one party relative to the presidential candidate from the other party. But ticket splitting decreases, not increases, as these distances grow.

Table 8. Perceived Polarization and Strategic Ticket Splitting in 2000

	Distance between Parties	Distance between Presidential Candidates	Distance between House Candidates	Distance between Bush and Dem House Candidate	Distance between Gore and Rep House Candidate
Split Vote	-.04	-.08*	-.13*	-.19**	-.21**
RD Vote	-.02	-.01	-.03	-.16	-.06
DR Vote	-.03	-.09*	-.14*	-.09*	-.20**

Source: 2000 National Election Study.

Note: Cell entries are correlation coefficients. . * $p < .05$, ** $p < .01$

To consider these relationships in a more descriptive form, Table 9 shows the mean RD and DR distances (again, as perceived by the respondent) for each of the four voting patterns. If strategic balancing occurs, distances should be greater among those who cast split tickets. Instead, the data again show exactly the opposite pattern. Straight ticket (RR and DD) voters perceive larger distances between presidential and House candidates, a finding that undermines widespread balancing.

⁷ Following convention, we use “RD splitting” to indicate voting for a Republican presidential candidate and Democratic House candidate. Votes for third parties are ignored here.

Table 9. Perceived Polarization and Voting Patterns in 2000

Presidential Vote	House Vote	RD Distance	DR Distance
R	R	2.56	3.23
R	D	1.88	2.38
D	R	1.96	2.03
D	D	2.62	2.46

Source: 2000 National Election Study.

As a final take on this question, we move from the individual to the aggregate level. In Table 10 we regress several measures of polarization on indicators of split-ticket voting. The two dependent variables are total major-party split-ticket voting as reported in the NES and the percentage of House districts that were “split” between 1972 and 2004. The three independent variables measuring polarization are the percentage of respondents who see “important differences” between the parties, party polarization in the House measured with differences in mean NOMINATE scores, and differences between parties’ ideological placements in the NES. We cycle through all combinations of independent and dependent variables. In each model we control for the percentage of NES respondents who report being “independents” to be certain that split-ticket outcomes are not merely a reflection of changing party loyalties. The models show no support for strategic balancing in any case. Although the effect of independents is generally positive, as would be expected, polarization is significantly and negatively related to ticket splitting in all but one combination.

Table 10. Aggregate Relationship between Polarization and Strategic Ticket Splitting

	Split-Ticket Voting (NES)			Split House Districts		
Important Differences between Parties (NES)	-.35** (.16)			-.54 (.35)		
House Party Polarization (NOMINATE)		-43.49** (8.84)			-70.11** (24.21)	
Party Polarization (NES party placements)			-22.32* (11.32)			-54.35** (15.95)
Independents (NES)	.79** (.21)	1.09** (.16)	.79 (1.13)	.29 (.48)	.79* (.43)	1.18 (1.59)
Constant	14.55 (8.51)	12.47** (4.26)	36.33 (26.44)	50.55** (18.97)	48.05** (11.68)	88.69* (37.24)
Adjusted R^2	.58	.79	.38	.034	.33	.75
Number of Cases	13	14	9	13	14	9

Source: National Election Study cumulative file and Keith Poole.

Note: Cell entries are OLS regression coefficients with standard errors in parentheses.

* $p < .10$, ** $p < .05$, two-tailed test.

Split-ticket voting occurs and is predictable at both the individual and aggregate levels, but this variation is not consistent with strategic balancing. Although we have not exactly estimated how much strategic voting occurs via balancing, the Campbell and Miller (1957) conclusion that issue motivation encourages straight not split ticket voting is well supported. In

their words, “the more highly motivated [the voter] is toward this political objective, the less willing he is to dilute his vote by crossing party lines” (303).

Other Cases

We have shown that primaries, third parties, and presidentialism provide the American voter with many opportunities to vote strategically than previously recognized. Other arenas also exist that allow for strategic voting, even if they are less widespread. Here we discuss several of these briefly: jungle and blanket primaries that exist in a few states (and in particular California’s short-lived blanket primary in the late 1990s), runoff elections that operate mainly in the South, and the 2003 California recall. Although most voters regularly face a wide range of opportunities to cast a strategic vote, some electorates are also faced with unique voting situations that extend the possibilities of strategic voting.

We start by examining California’s experiment with the “blanket” primary. Blanket primaries allow all voters to participate, regardless of party registration. Once in the booth, voters are faced with one ballot which lists all of the party nominees for each office. Voters may switch between party primaries by office: voting in the Republican primary for Governor, the Democratic primary for the U.S. House, and so on. The top vote-getter from each party then proceeds to the general election.

Why do we call this California’s “experiment?” Mostly because it dramatically changed the rules on who could participate in primaries, and did so for only a short period of time. In 1996, California had a purely closed primary system (only those registered with the party could vote). Then Proposition 198 was approved by voters, instituting the blanket primary in time for the 1998 elections. By June 2000, however, that system had been swept away by a Supreme Court ruling that the primary violated the associational rights of political parties. California returned to the pure closed system it had employed previously. The experiment with the blanket primary therefore lets us see the effects that different rules have on voters’ strategic calculations (Cain and Gerber 2002).

In particular, the blanket primary should allow for more crossover voting: voters are free to vote in a different party’s nominee on an office-by-office basis without having to pay the costs of changing registration status or missing out on voting for candidates for other offices. Indeed, a majority of participants in the 1998 elections voted for candidates from more than one party. Salvanto and Wattenberg (2002) show that 44.1% of participants voted for nominees of just one party, while the rest divided their votes amongst Democratic, Republican and minor party candidates. These numbers are similar to the amount of straight-ticket voting in general elections, which was 37.5% in the 1994 California elections.

However, most voters still cast sincere ballots (Sides, Cohen, and Citrin 2002). Few appeared to “raid” the other party’s nominations: indeed, in the general election, most supported the candidate they had voted for in the primary. Californians instead crossed over when the race for their own party’s nomination was largely settled and the other party featured a competitive race (Kousser 2002; Salvanto and Wattenberg 2002; Sides, Cohen, and Citrin 2002). Crossover voters were not motivated by negative strategic considerations, but rather by their desire to take part in an exciting race. In particular, voters tended to cross over to the other party to vote for an incumbent, who they are presumably more likely to know and like (Alvarez and Nagler 2002; Salvanto and Wattenberg 2002)

Although often also referred to as a “blanket” primary, Louisiana’s primary system is unique (Kuzenski 1997). Like the blanket, primary voters are faced with a long list of candidates from any party, and may vote for whoever they prefer to proceed to the general election. All candidates – regardless of party – are placed on the same ballot. Louisiana’s “jungle” primary differs from the blanket in two key ways. First, if one candidate wins a majority of votes in the primary, they are automatically elected to office with no need for a further election. Second, if no-one wins more than 50 percent, the top two candidates proceed to a run-off election – regardless of which party they are from. For example, a primary race with several Republicans and several Democrats could be followed by a runoff election between two Democrats.

Various strategic possibilities emerge. Voters who have a sincere preference in the primary may be faced with competing considerations: will my preferred candidate receive more than half of the primary votes? Who would be the weakest candidate to face them in the event of the runoff? Given that the answers to these depend on beliefs about the preferences and strategic choices made by others, the Bayou State’s primary system offers a rich area for studies of strategic voting. However, few researchers have looked specifically at the choices these voters make, an omission which should be rectified in the future.

Several other – mostly Southern – states also use runoff elections. If no candidate receives a given percentage of the vote in the primary election, the two highest placed candidates proceed to a subsequent election to determine the party’s nominee for the general election. In the Democrat-dominated “solid South” of the past, runoff primaries were adopted to ensure that whoever won the Democratic nomination adequately represented the views of a majority of the party (Bullock and Johnson 1985).

As of 2005, nine states in addition to Louisiana used some form of a runoff primary: Alabama, Arizona, Georgia, Mississippi, North Carolina, Oklahoma, South Carolina, South Dakota and Texas. However, some impose less stringent requirements for avoiding a runoff than others. Candidates in South Dakota only need to win at least 35% of the primary vote to win the nomination, while those in North Carolina need only 40%. These runoffs provide yet another dimension of calculation for strategic voters: they may assess a candidate’s chance of winning the first primary outright, the possibility of a runoff occurring, their chance of advancing to a possible runoff, their chance of winning the runoff *and* their chance of winning the general election when deciding who to vote for. Raising the threshold obviously alters the opportunities for strategic behavior.

Finally, one other rare – but recently consequential – electoral contest allows for various voting strategies, this one also in California. In October 2003, Californian voters were faced with two electoral choices on the same ballot. First, should Democratic Governor Gray Davis be “recalled” (removed) from office? And second, if the recall measure were to pass, who should replace him as governor? The first choice was a simple yes or no vote – but voters were faced with 135 candidates vying to replace him, including only one major Democrat (Lt. Gov. Cruz Bustamante) but several well-known Republicans including Arnold Schwarzenegger and Tom McClintock.

The recall election allowed for two types of strategic voting (Shaw, McKenzie and Underwood 2005). First, some Democrats may have been faced with a strategic choice because of the question on the first ballot. Those voters who would prefer to see Cruz Bustamante as Governor over any other candidate (including Gray Davis) but nonetheless voted against the recall (i.e. to keep Davis in office) to ensure no Republican took office are assumed to be

strategic voters. Second, some Republicans may have been faced with a strategic choice simply because of the number of Republican candidates running on the ballot against Bustamante.

Shaw, McKenzie, and Underwood (2005) find a relatively high rate of strategic voting, especially given the uniqueness of the recall election and the fact that no voters had previously faced this strategic environment. Overall, 8% of the electorate cited Bustamante as their first choice but still voted for Davis (i.e. against the recall), while 11% of the voters said they preferred McClintock but still voted for Schwarzenegger. Large numbers of those who preferred Bustamante over all other alternatives nonetheless voted against the recall. Alvarez, Kiewiet, and Sinclair (2005) similarly estimate that 84% of his supporters acted strategically in this way.

Conclusions

The American political system is often assumed to be a paradigmatic case of two-party domination that offers few opportunities for strategic behavior by voters. This is, in fact, not the case. The vast number of elections for public office frequently features three or more candidates. And the primary nominations that precede all of these elections often feature multiple candidates who are unable to differentiate themselves using simple heuristics like party labels. The opportunities for strategic voting – choosing a candidate who is not your first choice but is more likely to win – are rife.

However, we suggest that strategic voting is possible in a number of additional contexts. Voters do not always have to be faced with more than three candidates in a discrete election to cast a strategic vote. Even with sincere preferences in a two-candidate race, primary voters may choose the most electable candidate to beat the opposition in the general election, or crossover to the other party's primary to choose the least electable candidate to face their preferred candidate. Even in general elections, voters may choose a candidate they do not prefer to try to balance the policy outputs that government produces.

That Americans are faced with more opportunities to vote than citizens of most other countries is old news. What cuts against much conventional wisdom, however, is the notion that these votes can be cast strategically. We have shown here that the opportunity for Americans to vote strategically is widespread. Future research should move on from assuming these opportunities do not exist, and investigate when, why, and how many voters take advantage of them.

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