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Chapter 17: Party strategies: valence versus position

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In this chapter we provide an overview of the interaction between spatial theory of party competition (i.e. party competition that involves the strategies with regard to the policy positions of parties) and the valence model of voting (i.e. party competition that involves parties' image of non-positional issues such as competence, integrity, and party unity). We claim that while these two models of party strategy have been considered competitive and exogenous to each other, they can also be seen as complementary.

We first look at the foundations of the spatial model of party competition, by examining the assumptions associated with the model. In a unidimensional left-right spatial continuum, the proximity model argues that voters will opt for the party most congruent to their position. Therefore, in a two-party competition, parties are expected to converge towards the median voter of the Left-Right continuum. Though these two fundamental concepts often hold true, we are interested in understanding which conditions incentivise divergence of party strategies from the median in a spatial Left-Right continuum. In this chapter, we will evaluate and review how this debate has adapted to new challenges posed by multidimensional issues, multilevel party systems, and fluctuations of competency. While we review the theoretical literature, the focus of this chapter is on recent developments in empirical evidence.

Finally, we explore the puzzle of the simultaneous dynamics of valence and spatial models by discussing how a party's valence image affects its positional strategies. We conclude

on the question of whether parties strategically emphasise positions or valence, showing how party strategy is not made in a vacuum but also evolves around new competition on a spatial and/or valence dimension. This chapter provides an overview of the progress in the spatial versus valence debate and it shines some light on new and important research pathways. Some of these include: how do parties choose to emphasise their policy or valence positions, and what are the electoral consequences of this choice?

The spatial model of party competition

The spatial model of party competition is based on the economic idea of stability in competition formalised by Hotelling (1929), where entrepreneurs spatially locate their stores to maximise profit. Hotelling noted that parties mimic each other's platforms to ensure electoral success. The spatial model of voting was developed by Black (1948) concerning small group decision making, and by Downs (1957) concerning voting in elections. Since Downs's (1957) seminal work, ample theoretical and empirical research has utilised the spatial voting (proximity) model in order to explain party strategies. According to this model, voters (consumers) vote (buy) based on the proximity between their policy preference (location of their home) and the parties' policy platforms (location of the store). Put simply, voters opt for the party that announces the policy position closest to their preferred policy. As a result, parties strategically advocate policies that maximise the number of voters who prefer their position over any other party's position in a given party system.

In the simplest spatial model, parties' positional strategies and voters' preferences are modelled across a single policy continuum. In Western democracies, this continuum has been

generally associated with a set of economic policies such as government intervention in the economy, redistribution of wealth, and the scope of social benefits. Parties on the left end of the continuum advocate the expansion of these policies, while parties on the right support repealing or replacing these policies with neo-liberal or market-based policies. In recent years, the Left-Right continuum has been increasingly regarded as an overarching dimension of political ideology encompassing economic and non-economic policies.

Researchers are then interested in answering two distinct sets of questions related to this unidimensional model of party competition: theoretical and empirical. In this chapter, we use the terms 'theoretical' and 'formal-model' interchangeably to describe mathematical or game-theoretical models of party competition. Theoretically, scholars seek to understand the positions parties *should take* (defined as '*Nash equilibrium*') under different assumptions about the real world. Drawing upon game theory, the Nash equilibrium in the context of spatial models is a set of policy positions such that no party has the electoral incentive to unilaterally alter its position, given the positions of all other parties. Empirically, research focuses on the positions parties *do take* and the electoral consequences of these positions.

Formal models of party spatial strategies

The spatial model of party strategies originated in the work of Anthony Downs (1957) on the unidimensional and two-candidate elections in the United States. The famous game-theoretic Nash equilibrium of the Downsian model refers to the convergence of two parties to the position of the median voter. This outcome lies on a set of assumptions that do not necessarily represent real-world politics. When these assumptions are relaxed, convergence to the position of the

median voter is no longer the optimal party strategy. For example, Downs assumes the parties hold complete information about the policy preferences of voters, and voters know parties' positions. Berger, Munger, and Potthoff (2000) demonstrate that parties diverge from the position of the median voter when the complete information assumption is relaxed (i.e. voters are uncertain about parties' positions). Downs also assumes that all eligible voters will turn out to vote, but when the complete turnout assumption is relaxed parties polarise their positions (Adams and Merrill, 2003). Another assumption is that parties try to maximise their chance of winning office. Yet, when parties seek to influence policy rather than merely maximise their probability of gaining office they will diverge from the position of the median voter (Wittman, 1973; 1977). Polarisation of parties' platforms also accrues when voters weight, in addition to proximity, the direction of parties' announced policy positions. That is, when voters with left-leaning preferences prefer parties on the left, and right-wing voters are biased toward right-wing parties, even when these parties are further away from them in absolute proximity terms (Rabinowitz and Macdonald, 1989). Grofman (2004) reviews the complete set of Downs's assumptions and their relationship to parties' optimal strategies.

While a Nash equilibrium outcome tends to be common in formal models of two-party competition, this is not the case in multiparty competition. To maximise their vote-share, parties must position themselves where the largest number of voters prefer their position over any other party's position. However, such a position is difficult to identify in a multiparty competition setting. This is because parties encounter two opposing forces – a centripetal force that attracts parties toward the centre and a centrifugal force that pushes parties toward the ends of the Left-Right continuum. On the one hand, the voter distribution tends to be denser around the centre,

thus creating a centripetal force. On the other hand, to attract enough voters, parties must distinguish themselves from their counterparts, thus facing a centrifugal force (Cox, 1990; Spoon, 2011).

To see this logic, think of a party system where voters' preferences are normally distributed and single-peaked around the centre of the (0-10) Left-Right dimension. As illustrated in Figure 1 (panel A), in a two-party competition between party A and party B, both parties will position themselves at (or, given the condition stated above, close to) the position of the median voter (5 in the illustrated case). In this situation, party A's vote-share (marked in black) equals party B's vote-share (marked in light grey). When a third party (C) emerges, for example, to the right of the two parties at the centre it is expected to receive a large share of the votes (marked in dark grey) at the expense of party B. The now middle party (B) is 'squeezed' between A and C and is expected to lose most of its votes. Thus, B has the electoral incentive to leap-frog to the left of party A (shown in panel B). But once B positions itself to the left of A, A has the incentive to take a position to the right of C, because now its vote-share shrank (shown in panel C). Note, that with every leap-frog the vote share of the party in the middle increases incrementally because the parties on the flanks are slightly more polarized with every iteration of this dynamic. Thus, this process of the three parties changing their positions continues until the space in the middle exceeds the space on the flanks. At this point, the parties start to converge until the space on the flanks exceeds the space in the middle. The conclusion arising from this process is that under any set of positions, at least one party can increase its vote share by changing its position, and therefore there is no stable equilibrium in a three-party competition.

[Figure 1: Party Positions in Three-Party Competition]
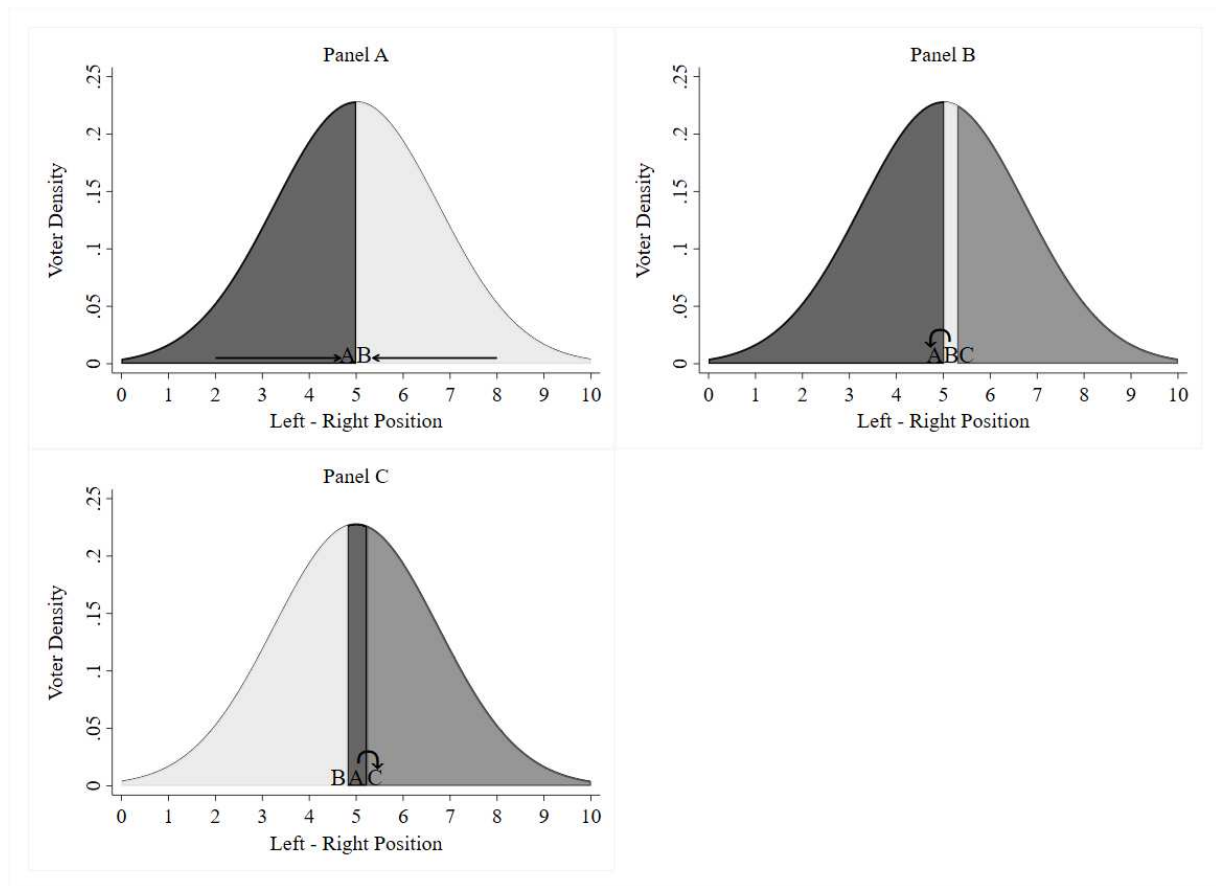
[Note: Figure 1 represents a theoretical example of a three-party competition. In this figure, voter preferences are distributed on a 0-10 Left-Right continuum with a median at 5 and a standard deviation of 1.75]

Similar to the three-party case, in a unidimensional competition between any number of parties, at least one party will have the incentive to move toward the centre of the distribution, or if squeezed between two other parties to leap-frog toward the flanks. Therefore, no Nash equilibrium exists in a multi-party and unidimensional party competition where the voter distribution is single-peaked. Note, however, a Nash equilibrium can exist when the voter distribution is *not* single-peaked. That is, when the voter distribution has more than one hump

and the number of parties is exactly double the number of humps, an equilibrium can exist under a set of specific conditions (see Adams (2018) for a review).

Game theoretical spatial models of multidimensional party strategies are scares and extremely complicated and do not converge to a clear Nash equilibrium. In the case of two office-seeking parties, based on McKelvey's Global Cycling Theorem, we can expect each party to announce policies that are similar to the announced policies of the other party, and that the two parties will present policies that are similar to the position of the median voter on each dimension. However, for most voter distributions, these announced positions can be defeated by a different set of positions in the multidimensional policy space, and thus motivate parties' strategies to cycle around each other's positions (Adams 2018). Lastly, the size of the set of possible winning party strategies in a multidimensional space increases with the number of parties, the number of policy dimensions, the goals of the parties (i.e. office-, vote-, or policy-seeking parties), and the electoral rules.

Empirical findings of the electoral consequences of party strategies

The empirical study of party strategies relies, first and foremost, on measures of party positions. Thus, before discussing the empirical studies of parties' strategies, we provide a short overview of major datasets of parties' policy positions across countries and time. Scholars have developed three major approaches to measuring parties' positions. First, party positions are measured through voters' perceptions in surveys such as the Comparative Study of Electoral Systems (CSES) and the European Election Study (EES) or through a compilation of country-specific election studies, such as the British (BES) or German (GLES) election studies (see data section

in Zur 2021a). A second approach to measure party positions is via expert surveys, in which political experts are asked to place political parties on multiple issue scales. The Chapel Hill Expert Survey (CHES) is the leading example of this approach, covering European parties. In 2020, the Global Party Survey expanded this approach to countries outside Europe (see also handbook chapter 40). Lastly, party positions are measured not through their perceived positions, but via their strategic public communications. The Manifesto Project (see also handbook chapter 38) codes parties' electoral manifestos and the Comparative Campaign Dynamics Dataset (CCDP) codes parties' pre-election statements in major newspapers. Each of these different approaches has advantages and disadvantages for the study of party strategies, which we do not aim to review here. We do, however, note the finding by Adams et al. (2019) that while there is a strong correlation between these measures of party positions at any specific point in time, there is no such correlation between the measures of parties' positional *shifts*. Thus, when researching party strategies over time, researchers should be especially conscious of data limitations.

The major expectation from the theoretical literature is that in a unidimensional competition parties will balance their strategy between the centripetal force of the moderate electorates (Adams and Somer-Topcu 2009) and the non-centrist policy preferences of their partisans and activists (Adams and Merrill 2005; Adams, Merrill, Grofman 2005; Schofield and Sened 2005; 2006). They will do so while distinguishing their positions from those of their opponents (Spoon 2011; Zur 2019). Thus, parties can be expected to strategically change their positions in response to: (1) Changes in public opinion, and mainly the position of the median voter; (2) The position of their core constituency; and (3) The positions of their rivals.

When party competition involves more than a single dimension, party strategy encompasses two distinct, but endogenous, decisions. First, parties need to decide which positions they announce or policies they advocate. Second, parties need to decide which positions to emphasise and which positions to blur. That is, to maximise votes, parties can either alter their positions on one or more of the issues or they can focus their campaign on emphasising advantageous positions. These two decisions are endogenous because when parties emphasise one issue over another, voters perceive them as moving in the direction of the emphasised issue (Meyer and Wagner 2019) and moving on the overarching Left-Right dimension (Meyer and Wagner 2020).

In multidimensional-multiparty competition, parties can use issue-emphasising strategies to overcome, or at least minimise, their positional (spatial) disadvantages. For example, Spoon and Klüver (2014) argue that parties emphasise different issues in different elections (i.e. national or European Parliament election). Klüver and Spoon (2016) show that parties emphasise issues that are important to voters, especially if they are large or opposition parties. Rovny (2012) demonstrates that parties emphasise extreme positions and Wagner (2012) finds that parties stress extreme positions when parties are relatively small, when issue positions are ideologically distinctive and when other parties neglect the issue in question (see also handbook chapter 19).

The valence model of party competition

Stokes (1963) reviews and criticises the assumptions of the Hotelling-Downs model claiming that, among other failures of the model, it will not work if 'voters are simply reacting to the

association of the parties with some goal or state or symbol that is positively or negatively valued' (p. 373). Thus, Stokes coined the term *'valence issues'* as attributes of parties that all voters approve (or disapprove of). Therefore it matters less where parties are positioned on these issues and instead, other attributes become more central. Such attributes are, but not limited to, competence, the ability to govern, integrity, or party unity. Stokes also differentiates between *valence* issues and Downsian *positional* issues. That is, issues on which parties advocate and voters prefer alternative government policies. Parties, according to Stokes, are differentiated by the degree to which voters perceive them as possessing these desirable attributes, which are not directly related to their current policy positions.

To better grasp the difference between valence and positional issues, 'the state of the economy' is a good example: all voters prefer a strong economy over a weak economy, independent of their economic policy preference, thus the state of the economy is a valence issue. If one party is associated with improving the state of the economy (i.e. economic competence) while the other party is associated with an economic collapse (i.e. economic incompetence), the first party can be considered a valence-advantaged party. However, the mechanism to improve the state of the economy (e.g. increase taxes and social benefits versus decrease taxes and cut social benefits) is a positional issue. Parties advocate and voters prefer different levels of government intervention in the economy.

The concept of valence as described by Stokes has been expanded and refined by scholars of both American and Comparative politics. In its broader sense valence is referred to as *any* electoral advantage a party or a candidate possesses, including the incumbency advantage in

American politics, financial resources, in addition to the party attributes discussed above (Feld and Grofman 1991; Groseclose 2001). Others argue that valence is an affective heuristic that advantages one party over another. That is, in addition to the party attributes described by Stokes, voters simply like some parties or party leaders while disliking others. Likeable party leaders add a non-spatial advantage to their party (see works by Clarke, Whiteley, and their co-authors). Another extension to the original meaning of valence issue derives from the large body of literature known as 'issue ownership' (see also handbook chapter 18). Parties enjoy an electoral advantage if voters perceive them as competent proponents of a salient issue (Belanger and Meguid, 2004; Stubager, 2018), but not necessarily when the party image is merely associated with an issue (Walgrave, Tresch, and Lefevere, 2015).

The expansion of the term 'valence' motivated scholars of both formal and empirical party competition to distinguish between 'types' of valence. For example, work by Schofield (2004) and Schofield and Sened (2005; 2006) differentiate between valence advantage due to the popularity of the party and specifically its leader, and valence advantage due to the support of party activists. Party activists supply free resources to the campaign in terms of time and money, which enhance parties' electoral support. Relatedly, research by Stone (Stone and Simas, 2010; Stone, 2017) distinguishes between campaign- and character- valence advantage. Campaign valence advantage refers to parties' ability to attract resources, win prior elections, and wage an effective campaign. The concept of character- valence advantage is in line with Stokes's original definition of candidates' or parties' attributes such as competence and integrity.

Lack of comparative measurement of valence

While valence has been an influential concept in the study of party strategies and voting behaviour, to the best of our knowledge, there is no systematic cross-national and cross-sectional measure of valence. There are, however, numerous attempts to measure parties' valence attributes. The most comprehensive measure of valence has been data collection by Clark (2009; 2014; Clark and Leiter, 2014). Clark content-analysed news reports from Keesing's Record of World Events to measure parties' image of competence, integrity, and unity in nine West European countries between 1976 and 1998 (Clark, 2009). Although not a direct measure of parties' valence image, the Comparative Campaign Dynamics Dataset (CCD) is an additional source of valence (in addition to parties' positional and issue emphasis strategies) related data. The CCD dataset codes pre-electoral major newspapers coverage of parties' statements referring to themselves and to their competitors, and the statements the newspapers have made referring to the parties in major newspapers. While this is a comprehensive and meaningful dataset, it is limited to recent elections in ten European countries.

The lack of comprehensive measurement has motivated researchers to estimate parties' valence image using survey data. The works by Clarke and co-authors discussed above estimate parties' valence image using a set of available survey questions about party leaders' popularity, parties' ability to handle the most important issue, and party identification (e.g. Clarke et al., 2004; Sanders et al., 2011). An even cruder proxy for parties' valence image has been used by Adams and his co-authors (e.g. Adams, Merrill, and Grofman, 2005; Adams and Merrill, 2005; Zur, 2021b) and Schofield and his co-authors (e.g 2004; Schofield and Sened, 2005; 2006). These authors capture the non-policy image of parties using statistical approximation (for

technical discussion see appendix 2 in Adams, Merrill, and Grofman (2005). This approach has been criticised as inconsistent and inaccurate (Mauerer, 2020).

The Relationship between the valence and spatial models of party competition

Traditionally, valence and spatial models have been seen as exogenous to each other, or even as competing explanations of parties' strategies and citizens' vote choice. Recent literature has taken a more holistic approach to the study of party competition through interacting how the valence image of a party influences positional strategies and vice versa. This research indicates that spatial and valence theories are not necessarily competing theories and complement each other for a deeper understanding of party strategy. Yet, many parties do not have the resources to focus on both – positions and valence. Therefore, latest research examines the conditionalities of electoral success for position and valence strategies.

How does parties' valence image affect their positional strategies?

A growing literature studies the effect of parties' *fixed* valence image on their positional strategies (Londregan and Romer, 1993; Ansolabehere and Snyder, 2000; Serra, 2010). These studies demonstrate that *valence-disadvantaged* parties, i.e. those perceived by voters as less competent, trustworthy, or unified than their counterparts, must differentiate their policy positions from the positions announced by their rivals. This differentiation strategy is crucial for valence-disadvantaged parties because when citizens vote based on a combination of policy proximity and non-policy considerations, similarities on the policy dimension mean that the non-policy dimension tips the scale of voters' decision rule to the side of the valence-advantaged

party. This theoretical conclusion has been supported by a study of the 2006 midterm elections to the US House of Representatives which finds that incumbents' character-based valence advantage draws them closer to the median position in their district and their opponents' disadvantage in character pushes them away from district preferences and the incumbent's positions (Stone and Simas, 2010). In comparative studies of European politics, Spoon (2011) shows that Green parties, which tend to be valence-disadvantaged relative to mainstream parties, differentiate their positions from those of their immediate Social-Democratic rivals. Zur (2021a) shows that Liberal parties' inability to distinguish their positions from valence-advantaged moderate parties on Left-Right dimension obviates any positional strategy.

A second strand of the literature studies the effect of *changes* in parties' image of valence on their positional strategies. The seminal work by Schofield (2004) models vote-seeking parties' positional strategies in reaction to changes in two types of valence. Schofield shows that when parties' popularity-based valence, i.e. their leader's charisma or image of competence, deteriorates, parties strategically shift their position towards their (typically) non-centrist activists. Diverging from the centre towards their activists, allows parties to 'acquire' activists'-based valence, i.e. a valence advantage that derived from the time and financial contribution of party activists. Popular leaders, on the other hand, have the leeway to moderate their parties' position and appeal to centrist and unaffiliated voters, rather than to party activists. That is, in Schofield's model, character-based valence deterioration is a centrifugal force vis-à-vis parties' policy position. This theoretical argument has been supported by empirical evidence shown by Schofield and Sened (2005; 2006).

Adams and Merrill (2009) model valence deterioration as a centripetal force. They demonstrate that when office-seeking parties' valence image deteriorates (e.g. due to scandals, weak leadership, or intra-party divisions), parties have the incentive to moderate their position towards the median voter. Note, however, that Schofield (2004) and Schofield and Sened (2005; 2006) assume that parties aim to maximise their vote-share while Adams and Merrill (2009) assume that parties aim to influence policy. These different assumptions might explain their opposite conclusions about the effect of parties' valence image on their positional strategies. Nonetheless, empirical works show that as parties' valence image deteriorates, parties moderate their Left-Right positions (Clark, 2013).

How do parties' positional strategies affect their image of valence?

To the best of our knowledge, there is no game-theoretical (formal) modelling of the effect of parties' positional strategies on their image of valence. However, from Schofield's models discussed above it can be inferred that, by moving towards the ends of the political spectrum, parties can increase their activists-based valence. Similarly, works in American politics argued that by taking extreme positions candidates can appeal to donors and then use financial resources to 'buy' valence through political advertisement or name recognition (Erikson and Palfrey, 2000; Ashworth and Bueno de Mesquita, 2009; Zakharov, 2009).

While there is little formal work on the relationship between parties' positional strategies and their valence image, this issue has not been ignored by researchers. Zakharova and Warwick's (2014) observational study finds that voters assign higher valence qualities to parties that announce Left-Right positions closer to their own, especially when their positions are on the

same side of the Left-Right continuum (relative to the midpoint of the scale). Yet, most of the work on the effect of parties' positional strategies on their valence image employs experimental designs. For example, Johns and Kölln (2019) show that British respondents assign higher valence attributes, specifically competence, to moderate (but not purely centrist) parties. Moreover, the authors show that voters assign higher competence scores to parties on their side of the Left-Right continuum. In contrast, an experiment by Fernandez-Vazquez (2019) demonstrates that voters do not take a party's statements at face value because these messages can be a strategic tool to win elections. Voters doubt the sincerity of popular statements because they may respond to vote-seeking incentives rather than reflect the party's sincere views. Espousing unpopular policies has less instrumental value in obtaining more votes and therefore is more credible. Gooch, Gerber, and Huber's (2021) experiment in the context of US elections provides mixed evidence as well. On the one hand, the authors find that when candidates stray from their parties' possible positions they are perceived as less competent overall and less effective legislators compared to mainstream party candidates. On the other hand, extreme candidates tend to be viewed as bold and inventive leaders.

Do parties strategically emphasise positions or valence?

As discussed, both positional and non-positional strategies of political parties are important. Yet, because of their limited campaign resources, parties are often faced with the dilemma of choosing between emphasising policy positions *or* valence issues. Here again, formal models are scarce. Ashworth and Bueno de Mesquita (2009) present a model in which candidates first choose their policy position, then attempt to buy valence through campaign spending. The

authors find that when candidates' positions are polarised, they invest more in their valence image.

While the theoretical literature on this question focuses on a competition between two candidates, the empirical literature focuses on multi-party competition. Using the CCD dataset Bjarnøe, Adams, and Boydstun (forthcoming) demonstrate that parties strategically emphasise their issue-positions in their campaign rhetoric and attack their opponents' valence attributes. They argue that both office and policy seeking parties have the incentive to attack their counterparts' valence because, as shown by Clark (2009), negative media coverage of incompetence, dishonesty, and intra-party disagreements causes parties to lose votes.

Adams, Scheiner, and Kawasumi (2016) provide similar evidence that candidates to the Japanese House of Representatives running for the long-ruling party (LDP) de-emphasised policy debates compared to candidates of the relatively new opposition party, and that this dynamic flipped once Japan's economy collapsed. Curini (2017) shows that ideological proximity increases parties' incentive to make use of valence appeals (such as corruption) as a competitive strategy. Further, valence considerations are more important to a party when it is spatially squeezed between two competitors and when there is more to gain electorally from engaging in valence campaigning. Related to Curini's theoretical argument, Zur's research (2021a) implies that centrist parties, predominantly parties from the Liberal and Agrarian families, vote-maximising strategy is to improve their image of valence and avoid investing resources in changing their policy image.

Conclusions and avenues for further research

Understanding party strategies has been a key effort in political science. Researchers have devoted a great deal of attention to discussing the opportunities, incentives, and pressures that parties face to attract additional electoral support. At the core of the discussion is the debate about whether political choice is based primarily on congruence between voter preferences and party platforms or on non-ideological considerations. We argued that the strategic use of issues and the strategic use of party image are not competing, but complementary considerations that simultaneously shape parties' platforms and campaigns. As such, they present parties with a possibility to ease the dilemma of balancing the centripetal force of tending to the centre and the centrifugal force of appealing to their partisan base and can explain parties' deviation from the median voter's preferences.

Although the two have frequently been portrayed as rivals, we discuss how parties' valence images and positional strategies change synchronously. Valence advantage or improvement can generate further electoral support and permit looser discipline in strategic positioning, while disadvantage may pressure parties into strategically steering their policy positions closer to more popular opinions or to a point that improves their activist-based valence. At the same time, parties' positional strategies can also affect their image of valence in voters' minds and ability to appeal to activist groups. In discussing whether and when parties strategically emphasise positions or valence in their campaigns, we draw attention to the asymmetry in the way parties can utilise spatial strategies to their advantage so that valence considerations become more important to parties that are more restricted in their spatial moves. Our review of the studies identifying conditions that incentivise valence campaigning highlights

that much of the conclusions depend on the underlying assumptions about what parties seek to achieve in a competition, and about the resources, opportunities, and willingness they have to compromise either on policy or popularity.

Although we showed that much research has been done on proximity- versus valence-based party strategies in the past decades, we also emphasise that parts of the discussion call for further attention. Most of the studies addressing how parties' positional strategies affect their valence image rely on experimental designs. Additional formal and observational approaches would add invaluable insights to the debate.

A further crucial avenue of research is a continued inquiry into the nature of valence. Despite a common understanding of what is meant by the notion, researchers have always been open about the complexity of capturing and measuring it. Studies often rely on restricted understandings of valence or make use of proxies or estimates in absence of comprehensive measurement of parties' image. Understanding fully how various forms of valence can be parts of complex campaign strategies requires more systematic research, including the discussion of the distinction between valence image and strategic valence effort, as well as extensive efforts to accurately and consistently measure valence across time and space.

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