

Campaign Promises, Political Ambiguity, and Globalization

Theodoros Ntounias, Christina J. Schneider, and Robert Thomson

Abstract

Promissory representation is the idea that a significant part of representation consists of parties making promises to voters during election campaigns and keeping those promises if they hold enough power to do so after elections. In countries that are highly exposed to globalization, governing parties face significant challenges to fulfilling the promises they made to voters. At the same time, voters punish governing parties that fail to keep their campaign promises. This presents parties with the dilemma that while voters expect them to make ambitious promises during election campaigns, their capacity to deliver on those promises is undermined by the constraints of globalization. In response to this dilemma, parties rely on strategic ambiguity to avoid retrospective sanctioning by voters in future elections. Ambiguous campaign statements are reconcilable with a broad range of subsequent government policies and are therefore unlikely to be perceived as broken promises by voters. We analyze the use and effects of strategic ambiguity in a mixed-methods design consisting of a survey experiment and an observational study of 293 election platforms by 44 parties in six countries between 1970-2019. The findings shed new light on the widespread use of ambiguity in contemporary politics with important implications for democratic representation in a globalized world.

Keywords: elections, political campaigns, democracy, language, globalization

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Parties' electoral appeals to voters form a significant part of the democratic chain of command and control (Dahl 1956; Downs 1957; Powell 2000). If parties' campaign statements are sufficiently clear and consistent, voters can use this information to assess which parties propose policies that align closest with their own preferences, thereby informing their prospective evaluations. Furthermore, when voters assess governing parties' past performances, they may look back on what those parties promised in previous campaigns and are reminded of broken promises by governments' critics. In this way, campaign statements also inform citizens' retrospective evaluations. Despite the benefits of parties making clear statements, many election campaigns are replete with examples of parties and party leaders taking ambiguous stances on important issues, so much so that parties' use of strategic ambiguity has received considerable attention from scholars and practitioners (Shepsle 1972; Page 1976; Bartels 1986; Aldrich 1995; Meirowitz 2005).¹ In the United States, presidential candidates are frequently criticized for remaining vague on key policy issues (Bartels 1986; Tomz and Van Houweling 2009). For instance, Joe Biden won the 2020 presidential election while remaining vague on key issues including U.S. policy toward China.² In Europe, during election campaigns held in Greece in the midst of economic crises in 2012 and 2015, the main parties of the left and right made vague promises about changing the terms of Greece's bailout deal without offering specifics as to what those changes would be or how they would get creditors to agree. Even in the United Kingdom, where governing parties usually expect to govern alone and are able to fulfill most of their campaign promises, the Conservative Party was criticized for vague and conflicting statements on tax policy before the 2010 general election.³

Explanations of parties' use of strategic ambiguity are usually framed in terms of voters' prospective evaluations of parties. If used wisely, ambiguity can enable parties to appeal more broadly to voters (Downs 1957; Shepsle 1972; Somer-Topcu 2015; Lo et al. 2016; Tomz and Van Houweling 2009; Tolvanen et al. 2022; Tromborg 2021; Hersh and Schaffner 2013; Piston et al. 2018). Voters may infer that a political party with an ambiguous position agrees with them, or at least they will not be repelled by the party taking a clear position that differs from their own. Similarly, ambiguity may avoid

¹ The level of ambiguity is commonly defined in terms of "a probability distribution over points in the issue space" (Tomz and Van Houweling 2009, 84), with broader distributions corresponding to more ambiguity. See Lefevre (2024) for a recent review of this literature.

² BBC, January 19, 2021. "Joe Biden: Where does he stand on key issues?" <https://www.bbc.com/news/election-us-2020-53575474>.

³ Watt, Nicholas. 2010. "David Cameron Stiffens Tory Position with Pledge to Reverse National Insurance Rise." *The Guardian*, January 11. <https://www.theguardian.com/politics/2010/jan/11/david-cameron-tax-cuts-election>.

conflict with party activists and donors (Bräuninger and Giger 2018; Jensen and Lee 2017; Dahlberg 2009; Cahill and Tomashevskiy 2019), thereby bolstering the image of a united party, which is conducive to broader public support.⁴ While these explanations have provided remarkable insights into parties' use of ambiguity from different perspectives, they have in common the assumption that the root cause of ambiguity lies in voters' use of campaign statements in prospective evaluations.

We argue that parties' use of ambiguity is also affected by their expectations about voters' retrospective evaluations of their performance in future election campaigns, especially when the country is deeply integrated into the global economy. Parties not only want to win power, they also want to remain in power, and they use ambiguity to achieve this goal. Two robust empirical findings in the field of promissory representation form the basis of this argument. First, although parties often successfully fulfill their campaign promises if they gain sufficient governing power after elections, globalization severely constrains their ability to do so. Economic globalization often prevents parties from keeping their campaign promises or pursuing policies that are responsive to public opinion if they hold executive power after elections (Ezrow and Hellwig 2014; Hellwig 2015; Schneider and Thomson 2024). Second, voters punish parties for failing to keep their promises and reward those that do (Naurin and Oscarsson 2017; Stokes 2001; Matthiess 2020).⁵ Electoral punishment for promise breaking is part of a broader range of retrospective sanctions by voters (Healy and Malhotra 2013). Political parties aim to avoid the negative electoral consequences of promise breaking by making more ambiguous statements when they are more exposed to globalization and are less able to keep their campaign promises. Ambiguous campaign statements are reconcilable with a broad range of subsequent government policies and are therefore unlikely to be perceived by voters as broken promises.

We employ a mixed-methods design to test whether parties make more ambiguous campaign statements in more globalized contexts and to examine why they do so. Our main theoretical arguments and empirical measures focus on ambiguity in the form of vagueness, which consists of unclear language that obscures what a party stands for. We argue and demonstrate that it is vagueness, not ambiguity, that increases with globalization. Our mixed-methods design consists of two parts. First, we create a dataset

⁴ Ambiguity may also be related to the broader pattern of party competition, with parties being more ambiguous when elections are highly partisan (Tomz and Van Houweling 2009) or when they do not stand out on particular issues (Rovny 2012; Rovny 2013; Rovny and Polk 2020).

⁵ Election pledges, which are presented to voters during election campaigns, are distinct from coalition agreement pledges, which are the post-election outcomes of interparty negotiations. In the latter case, scholars find less evidence of electoral punishment (Ellger et al. 2023).

with measures of the levels of ambiguity in 293 English-language party platforms in six countries from 1970-2019. We find that parties make significantly vaguer campaign statements in countries and time periods that are highly integrated into the international economy. The results hold across different contexts, including governing experience and political ideology, and are robust to different model specifications, including an instrumental-variable approach and alternative operationalizations of the main variables. Second, we field a pre-registered survey experiment among U.S. citizens to test whether ambiguity reduces the political costs of broken promises. We find evidence that people punish politicians for breaking concrete promises that agree with their preferences. Moreover, in line with our argument, retrospective sanctioning is weaker for politicians who make vague statements and then vote contrary to citizens' preferences.

The findings provide evidence that political ambiguity is a strategy to minimize retrospective sanctioning and also address the polarized scholarly debate on the relationship between globalization and democracy (Dahl 1999; Rudra 2005; Acemoglu and Robinson 2006; Keohane et al. 2009; Rodrik 2012; Rodrik 1998; Meyerrose 2020).⁶ This debate is often framed in terms of the overall costs and benefits of globalization for democracy, with some scholars warning of the dangers of international integration for national democracy and others highlighting how it can strengthen national democracy at least in some contexts. Notwithstanding the importance of this broad debate, we contend that understanding the impact of globalization on democracy requires more detailed knowledge of its effects on key aspects of the democratic chain of command and control that underpins representation. One of these key aspects is the level of ambiguity in parties' electoral appeals to voters.

⁶ Milner and Mukherjee (2009) offer an excellent overview of the literature on the effects of globalization on democratization.

Theory

We present our argument about the impact on globalization on ambiguity in election promises in three steps. First, we discuss how globalization limits parties' ability to fulfill their campaign promises after they are elected to executive office. Second, we discuss why voters sanction parties retrospectively for promise breaking, even when promise breaking is a consequence of increased economic globalization. Third, based on these key insights we present our theoretical argument about how political parties use ambiguity in election campaign statements to adapt to the anticipated electoral consequences of promise breaking in the context of globalization.

Globalization and Promise Breaking

Parties are less able to keep their campaign promises when they enter government in countries and time periods that are more exposed to economic globalization (Schneider and Thomson 2024), and they also become less responsive to public opinion (Hellwig 2015; Ezrow and Hellwig 2014). This key finding concerning promise breaking builds on a program of comparative research in which a network of scholars examined parties' election pledges in a broad range of country contexts and time periods using comparable research procedures (Thomson et al. 2017; Naurin, Royed, and Thomson 2019). Aside from the negative impact of globalization on promise keeping, a range of other factors matter. Power-sharing arrangements, such as the need to form coalition governments after elections, severely reduces the likelihood that governing parties follow through on their campaign promises. When forming coalition governments, parties must reach compromises with their coalition partners, which sometimes means breaking the promises they made during the campaign. Sharp downturns in economic conditions also impede governing parties' ability to deliver on their promises, as policies that seemed possible at the time of the campaign appear infeasible in the midst of tighter fiscal constraints. There are three broad mechanisms through which globalization constrains governing parties' capacity to fulfill election pledges.

The first mechanism is that globalization is associated with economic uncertainty, as countries that are exposed to the international economic system are more prone to the unanticipated effects of changes in economic conditions that originate from other countries and the movements of international markets (Kayser 2005). Unanticipated downturns have a larger effect on promise breaking than unexpected upturns, as campaign promises usually concern popular initiatives that involve increasing public expenditure or forfeiting revenue, such as the expansion of social programs or tax cuts. When economic downturns occur, fiscal shortfalls follow, and governing parties face pressure to adjust their plans. According to Detlef Jahn (2006, p. 408), when countries are exposed to intense globalization, "international factors became a major driving factor for policy orientation and domestic factors became subordinated to them."

Therefore, the economic uncertainty associated with globalization makes it difficult for parties to make campaign promises that can reliably be fulfilled if and when they hold executive power after elections.

Second, globalization means that countries are bound by the constraints of international commitments. These commitments often limit governing parties' ability to fulfill their campaign promises in ways that were not foreseen by politicians and party officials at the time at which their parties' promises were formulated. National policies are subject to a broad range of complex international legal constraints, and the writers of party programs often lack the technical knowledge required to anticipate these accurately. International legal constraints include the details of preferential trade agreements and bilateral investment treaties, as well as the procedural rules and agreements of international organizations. The relevance of such legal constraints is evident in the many cases where governments have been compelled to change their domestic policies on health care, environmental standards, and labor codes when their existing policies breached rules encoded in trade and investment laws (Foster 2021). Even in the absence of formal monitoring and enforcement, there is a strong norm in liberal democracies that international laws are obeyed, such that governing parties are unlikely to breach international rules knowingly, even if doing so meant they could keep a campaign promise.

Third, globalization empowers certain market actors that can prevent governing parties from keeping their campaign promises. Multinational corporations and financial institutions have substantial influence over governments in countries that are deeply embedded into the international economic system. National export-oriented firms are also empowered by globalization. These market actors broadly favor neoliberal policies that maintain open borders and free trade (Sattler 2013). The policy preferences of market actors typically differ from those of citizens in general (Mosley 2003; Broz et al. 2007; Hellwig 2015). Lawrence Ezrow and Timothy Hellwig (2014) find that market actors generally favor lower taxes and lighter regulations compared to regular citizens. Consequently, to the extent that campaign promises are designed to appeal to citizens, lobbying by market actors can dissuade governing parties from keeping them. Governments, regardless of their partisan composition, have strong incentives to respond to market elites because they can threaten to relocate their economic activities or investments to other countries with more favorable conditions.

Taken together, these three mechanisms associated with globalization—economic uncertainty, international legal constraints, and the empowerment of market actors—reduce parties' responsiveness to public opinion and their ability to fulfill their campaign promises after they win power.

Retrospective Sanctioning of Parties by Voters for Promise Breaking

According to a popular understanding of how democracy works, parties that win the popular vote have a mandate to keep their campaign promises (Mansbridge 2003, p. 515). Notwithstanding the criticisms of this idea from the standpoint of political theory, parties' campaign promises create a common expectation of the policies they should pursue if they hold enough governing power to do so after the election campaigns in which they made those promises (Manin 1997; Stokes 2001). Parties' campaign promises have both prospective and retrospective functions for voters' decisions. To the extent that voters can rely on parties to keep their promises, they can use promises to assess which parties are closest to their own preferences. That is, voters tend to vote for parties if they agree with the general principles and policies that parties promise to enact.

It is, however, the retrospective function of campaign promises that is central to the link between globalization and ambiguity. The retrospective function consists of voters' decisions being informed by the extent to which parties acted on their promises when they were in government and had the power to do so. In other words, voters use previously fulfilled or broken promises to reward or punish parties for their performance in government. Empirical research shows that voters pay attention to pledge fulfillment and punish governing parties for failing to keep their promises (Naurin and Oscarsson 2017; Naurin, Soroka, and Markwat 2019; Matthiess 2020; Bonilla 2022). Broken promises hurt parties' reelection prospects and undermine public confidence in democracy (Stokes 2001). This retrospective function of governing parties' performance in terms of promise keeping is strengthened by the fact that parties frequently criticize their opponents for promise breaking. Aside from the widely held norm that promise keeping is desirable behavior, voters value consistency and tend to punish parties that change positions during the legislative period (Van Houweling and Tomz 2016; Croco and Gartner 2014; Tavits 2007). Voters punish parties for inconsistency, even if they support parties' new policies, partly because inconsistency increases uncertainty (Alvarez 1997) and changes perceptions about parties' trustworthiness (Sigelman and Sigelman 1986; Tavits 2007; Van Houweling and Tomz 2016).

Voters are unlikely to be dissuaded from punishing parties for promise breaking by the argument that this was an inevitable result of the constraints of globalization. The mechanisms through which globalization constrains governing parties—relating to economic uncertainty, legal constraints, and market actors—are rather complex and abstract, and are therefore hard for voters to accept. Voters who are generally mistrusting of politicians are unlikely to see such mechanisms as valid reasons for promise breaking.

To the extent that voters are cognizant of these constraints, they may see a party's failure to anticipate them as an indication of the party's lack of governing competence, which led it to make promises that it should have known could not be kept. Moreover, from the perspective of voters' retrospective evaluations, promise breaking as a consequence of globalization is qualitatively different from (and less excusable than) promise breaking as a consequence of domestic power-sharing arrangements such as the need to form governing coalitions. If a governing party does not keep a promise because it had to enter a coalition with another party, voters can easily comprehend this and may be willing to consider it as a mitigating circumstance. In countries where coalition governments are the norm, these constraints have been a feature of the political system for decades, sometimes centuries, and voters are well aware of them. In coalition systems, parties' campaign promises are less solemn promises than they are statements of where parties stand and points of departure for the coalition negotiations. By contrast, globalization is a more recent, complex, and less tangible phenomenon. This means that few voters view globalization as a valid reason for promise breaking, and many will punish governing parties electorally for failure to keep their promises, even as a result of the constraints of globalization that are largely beyond those parties' control.

The Strategy of Political Ambiguity

As globalization increases the likelihood that governing parties break their promises and voters sanction them for promise breaking, parties have strong incentives to adapt the contents of their electoral appeals accordingly. One of the main ways in which parties adapt is to use more ambiguous language, so that whatever they promise can be construed as consistent with a range of future government policies. In spatial terms, ambiguity refers to actors' policy positions being "a probability distribution over points in the issue space," rather than a clear single point position in the space (Tomz and Van Houweling 2009, 84). Making ambiguous statements shields parties from retrospective sanctioning by providing governing parties with greater room to maneuver once they are in office. Enriqueta Aragonès and Zvika Neeman (2000) show how the need for "wiggle room" after elections, which is needed in the context of globalization, can increase parties' use of strategic ambiguity. Ambiguity increases governing parties' ability to adjust to changing circumstances after the elections, which is a prevalent feature of globalization (Kartik et al. 2017). Anthony Downs (1957, 136) also refers to the possibility that parties may sometimes find it expedient to "becloud" their policy positions "in a fog of ambiguity." Kerri Milita et al. (2014), in support of this point, demonstrate that candidates in U.S. congressional elections actively adapt the ambiguity of their promises in response to the salience and popularity of issue positions.

Compared to parties that use more concrete language during election campaigns, parties that use vaguer language can select policies from a broader range of alternatives when they are subsequently in government, without being accused of breaking their campaign commitments. The obfuscation associated with ambiguity prevents voters from sanctioning governing parties for clearly renegeing on their campaign promises.

Ambiguity comes in two main forms, vagueness and ambivalence, and it is the first form that is likely to be impacted by the constraints of globalization. Vagueness refers to the use of language that is unclear and creates uncertainty about precisely what a party stands for (Eichorst and Lin 2019). While concrete language carries a relatively narrow range of reasonable interpretations of what the party intends to do, vague language carries a broader range of possible interpretations (Klein and Rovatsos 2011). Ambivalence is a distinct form of ambiguity and refers to situations in which a party makes different statements, all of which may be quite clear in their own terms, but taken together create uncertainty about where the party stands (Lo et al. 2016). Ambivalence is a less effective strategy than vagueness, as it exposes the party to criticism for being inconsistent, which voters generally dislike. Furthermore, ambivalence does not protect a party from future retrospective sanctioning, since governments' actions are likely to be congruent with some statements and not congruent with other statements. Vagueness, by contrast, shields parties from future accusations of promise breaking and does not expose them to accusations of internal inconsistency in relation to their campaign appeals. Another type of ambivalence is at the ideological level, where a party may take left-leaning positions on some issues and right-leaning positions on other issues. This creates ambiguity about where a party stands ideologically, but it does not preempt retrospective sanctioning for promise breaking, because a party's record of promise keeping is distinct from the ideological consistency of those promises.⁷

⁷ Moreover, as the strength of left-right ideology wanes in many countries, such consistency may become less relevant to voters.

Research Design

We test the empirical implications of the theory with data on the ambiguity of 293 election programs or manifestos by 44 political parties across six countries between 1970-2019.⁸ The sample is restricted to 1970 and later because our preferred measure of countries' exposure to economic globalization is available for this period. The unit of analysis is the election program, which is unique to each political party and election year. While election programs may not encompass the entire range of parties' electoral appeals, they are the most authoritative statements of parties' positions. These documents are used in a wide range of comparative research on parties and are the main source for researchers to understand what parties promised during election campaigns (Naurin, Royed, and Thomson 2019; Thomson et al. 2017). Comparative research has also established that the fulfillment (or breaking) of promises contained in election programs has significant impacts on voters' retrospective sanctioning of governing parties (Matthiess 2020; Naurin, Soroka, and Markwat 2019).

To measure *political ambiguity*, we follow Eichorst and Lin (2019) and apply an English-word dictionary of concrete and vague words from the 2015 Linguistic Inquiry and Word Count (LIWC) database. The LIWC database contains a set of word dictionaries that intend to capture different psychometric concepts in text or transcribed dialogue, such as positive or negative emotions, causal statements, concern, inhibition, assent, and many others (Tausczik and Pennebaker 2010). The dictionaries are created through an iterative expert coding approach. For the 2015 LIWC, coders are asked to use their experience and previous versions of the LIWC to create an initial word list for each psychometric concept. Then, using a large corpus of documents, other candidate words were identified through their repeated association with the seed words in different manuscripts. They were then passed back to the experts, who separately assessed the suitability of candidate words for the final dictionary (Tausczik and Pennebaker 2010).

We use the dictionary created to measure certainty and tentativeness, which has also been widely used in the psychology and psychometrics literature. To cite a few examples, it was used to measure the effects of emotionally charged written text on survivors of sexual abuse, cancer, and ankylosing spondylosis (Batten et al. 2002;

⁸ We include Australia (1972–2016, seven parties, and 64 manifestos), Canada (1972–2015, five parties, and 30 programs), Ireland (1973–2016, eight parties, and 51 programs), New Zealand (1972–2017, ten parties, and 63 programs), the United Kingdom (1970–2019, 12 parties, and 61 programs), and the United States (1972–2016, two parties, and 24 programs). The election programs are mostly documents published by parties during election campaigns, with the exception of Australia where programs prior to 1977 are commonly news reports of party leaders' speeches, and between 1977 and 2007 are transcripts of the speeches themselves; in total, 42 observations are of this nature. We examined whether the data source influences our results and find no evidence that the difference in election program sourcing leads to significant differences in the results. The results and robustness tests are presented in the Appendix. We source the texts of parties' election programs or equivalent documents from the Comparative Manifesto Project (CMP) database (Lehmann et al. 2024). Some of our analyses also use the CMP coding of quasi-sentences into thematic domains.

Creswell et al. 2007; Hamilton-West and Quine 2007), to measure the impact of testosterone supplements on language (Pennebaker et al. 2004), to show the effects of language specificity as an attenuating factor of reactions to affective claims and emotional expression (Centerbar et al. 2008; Kahn et al. 2007), to map out the social spheres of students' university community experiences (Mehl and Pennebaker 2003), and to create an experiment to measure the effects of different types of deception and lying on participants (Hancock et al. 2007). More relevant to political science, the dictionary was leveraged to analyze socialization and discourse within the Chinese-American community (Tsai et al. 2004) and to deconstruct the effects of the 9/11 terrorist attack on public speeches of elected officials (Pennebaker and Lay 2002).

We generate a count of concrete and vague words in each election program using the English-word dictionary of concrete and vague words.⁹ The dictionary contains 38 words coded as imparting tentativeness (e.g., seem, probably, hoping, hesitant) and 28 words coded as imparting certainty (e.g., never, confident, clearly, exact, guarantee). Several of these terms are coded as root words, meaning for instance that the words "certain," "certainty," and "certainly" are all coded as imparting certainty, but are counted as a single instance in the dictionary. We processed the documents by removing all stop words, and then identifying the proportions of ambiguous and certain words over the total remaining words in the text. We generate a measure of the ambiguity of each election platform by (i) subtracting the proportion of vague words from the proportion of certain words, and then (ii) taking the inverse of this measure.¹⁰ We standardize our measure to a mean of 0 and a variance of 1. A larger value indicates a more ambiguous election program, while a lower value indicates a more concrete one. Figure 1 illustrates variation in ambiguity over time. Figure 1a uses the average ambiguity across all election programs in each year. There is significant variation in ambiguity over time, but no clear trend toward more or less ambiguity. This reduces our concerns that any effect of economic integration on political ambiguity might be driven by a positive trend in both variables over time.¹¹ At the same time, Figure 1b illustrates that political ambiguity also varies significantly across the six countries. Finally, Figure 1c graphs political ambiguity for the two main parties in the United States. Overall, the graph demonstrates that average ambiguity is relatively consistent across countries but varies significantly across political parties and over time.

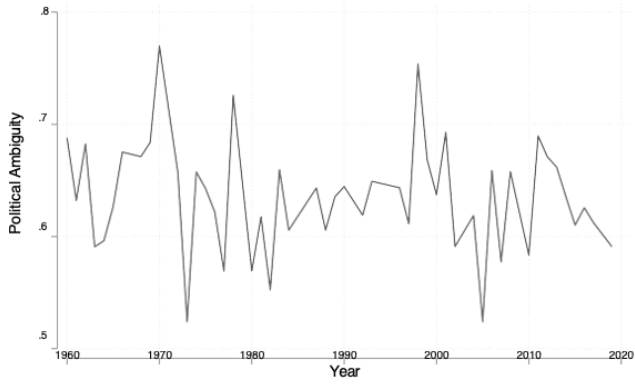
⁹ Although the sample is restricted to English-language party programs, it includes a broad range of political contexts and levels of globalization across time periods and countries.

¹⁰ Eichorst and Lin (2019) provide a more in-depth analysis and discussion of construct validity of this measure.

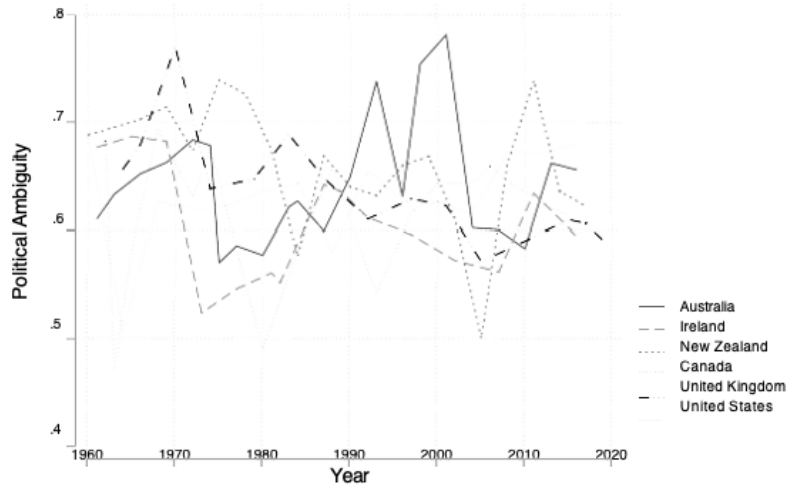
¹¹ Nevertheless, we include a time trend in our main models and perform a number of additional tests to probe this possibility further. For example, we include year fixed effects and estimate our main models for different time periods.

Figure 1. Political Ambiguity, 1960-2020

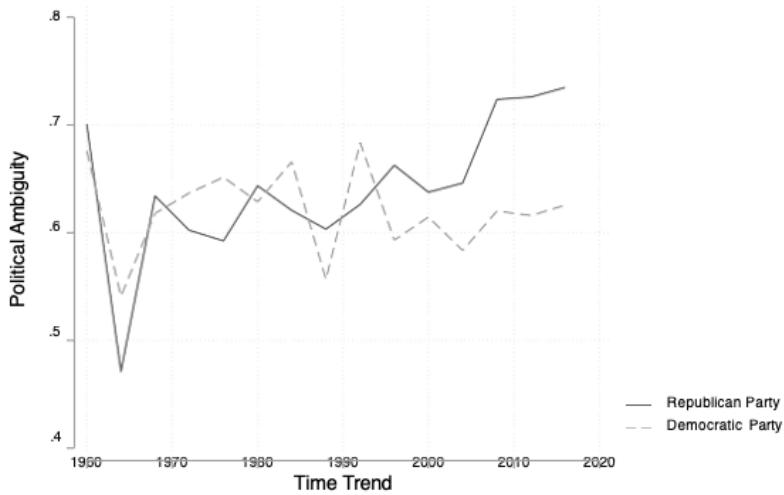
(a) Average Ambiguity



(b) By Country



(c) United States



Our main explanatory variable of interest is economic *globalization*. Globalization is the extent to which the national economy is integrated into the international system in terms of significant flows of trade in goods and services, large inward and outward investment flows, national regulations that facilitate free movements, and extensive international commitments in the form of trade agreements. These are aspects of globalization that constrain national policymakers (Rodrik 2012; Ezrow and Hellwig 2014). We use the authoritative KOF Economic Globalization Index, which is an annual weighted aggregation of information on *de facto* and *de jure* trade and financial globalization, including trade in goods and services, trade regulations, tariffs and agreements, financial direct investment, investment restrictions, and capital account openness (Dreher 2006). The index has been validated and widely used in the literature cited here and is the most appropriate index given our theory's focus on economic integration and the associated institutional constraints. We present the results for *globalization (trade)* and *globalization (finance)* separately but also show the results for the composite measure of globalization. The cases studied are all highly developed economies, and are therefore exposed to the international economy to a considerable extent. Nonetheless, there are marked differences in the relative levels of exposure to economic globalization. The observed values of *globalization* range from 33 to 90, with a mean of 61 and standard deviation of 14. The sample includes countries with medium, relatively constant levels of globalization (New Zealand, United Kingdom), countries that experienced very low economic integration in the 1970s and 1980s and a sharp increase in the 1990s (United States, Canada), and one deeply integrated country that also experienced a substantial increase (Ireland).

To address omitted variable bias, we include control variables at the levels of countries, election years, and party programs that have been used in previous research. We describe all control variables and present descriptive statistics in Appendix A. For the purpose of interpretation, all non-binary variables are standardized.

Since the dependent variable varies between 0 and 1, statistical analysis assuming a normal error structure could produce biased estimates. We estimate beta regression models with a logit link function, which use an error structure appropriate for our data (Papke and Wooldridge 1996), although as we later discuss, our results are robust to different estimators. All estimations include robust standard errors, country fixed effects, and a time trend. The inclusion of country fixed effects allows us to control for any unobserved factors that are constant within countries over time and further isolate the relationship between *globalization* and *political ambiguity*. The results are robust to using party fixed effects instead.

Comparative Analysis

Table 1 presents the main results in relation to our measure of ambiguity as vagueness. As expected, there is a positive and significant association between the composite measure of *globalization* and *political ambiguity*. However, of the two component parts, *globalization (finance)* and *globalization (trade)*, it is *globalization (trade)* that is associated with a strong and significant positive effect. This indicates that parties become vaguer during times of greater *globalization (trade)*. The insignificant coefficient associated with *globalization (finance)* supports the view that governments retain substantial room to maneuver when they operate in financially integrated markets (Mosley 2000; Mosley 2003). We therefore use *globalization (trade)* for the remainder of the analysis. The effect is substantially important too. An increase in globalization (trade) by one standard deviation is associated with an increase of .37 (on the 0 to 1 vagueness measure), all else being equal. The predicted values in Figure 2 further illustrate that the level of *political ambiguity* increases from around .45 at low levels of globalization to .75 at high levels of trade integration. This is a substantively large effect given that the variable varies between 0 and 1.

We now explore some of the additional implications of our argument. Although globalization reduces governments' abilities to maneuver on a range of policies, the effect should be particularly pronounced when it comes to economic policies. We therefore examine the impact of globalization in different policy areas. Using the CMP's coding of a party program's quasi-sentences into issue domains, we split each program into three policy fields: economic policy, which contains the CMP economy domain; foreign policy, which contains the CMP external relations domain; and social policy, which contains the CMP domains of freedom and democracy, welfare and quality of life, and fabric of society. Then we apply the measure of ambiguity as vagueness to each of these fields. Table 2 presents the results for our analysis for each of these distinct policy fields.¹² In line with our expectations, we find that the positive and significant effect of *globalization (trade)* on *political ambiguity* is driven by political parties using vaguer language in relation to economic policies. By contrast, there are no significant effects of *globalization (trade)* in relation to foreign and social policy fields.

¹² We present the full results including control variables in Appendix G.

Table 1. Globalization and Political Ambiguity

	(1)	(2)	(3)
	Economic	Trade	Finance
Globalization	0.276* (0.089)	0.376** (0.008)	0.040 (0.681)
Incumbent	-0.065 (0.355)	-0.058 (0.412)	-0.063 (0.362)
Economic Growth	0.029 (0.442)	0.022 (0.489)	0.004 (0.917)
Polarization	-0.063** (0.020)	-0.046* (0.073)	-0.058** (0.031)
Vote Share	-0.042 (0.317)	-0.043 (0.279)	-0.026 (0.542)
Party Age	-0.056 (0.305)	-0.054 (0.309)	-0.052 (0.339)
Niche Party	-0.035 (0.555)	-0.038 (0.514)	-0.037 (0.542)
Coalition	0.143 (0.310)	0.127 (0.353)	0.149 (0.315)
Left-Right Ideology	0.095*** (0.008)	0.105*** (0.004)	0.100*** (0.006)
Effective # of Parties	0.054 (0.553)	0.063 (0.465)	0.089 (0.353)
Time Trend	-0.015** (0.016)	-0.013*** (0.001)	-0.006 (0.218)
Constant	30.005** (0.014)	25.430*** (0.000)	11.556 (0.195)
Wald Test	48.221***	50.712***	45.883***
<i>N</i>	293	293	293

Robust standard errors in parentheses

* $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Figure 2. Predicted Values of *Political Ambiguity* for Different Levels of *Globalization (Trade)*

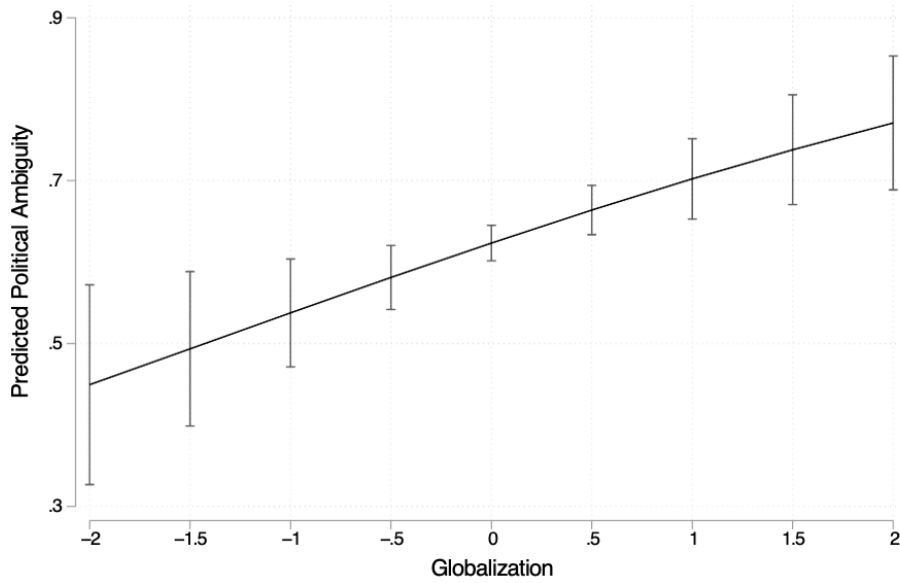


Table 2. Globalization and Political Ambiguity for Different Policy Areas

	(1)	(2)	(3)
	Economic	Foreign	Social
Globalization	0.307** (0.025)	-1.024 (0.126)	-0.015 (0.884)
<i>[Control Variables Omitted]</i>			
<i>N</i>	124	115	124

Robust standard errors in parentheses

* $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

In further analyses, we explored parties' use of ambivalence, meaning statements that may represent different sides of the same issue and could potentially be construed as inconsistent. We argued that, in contrast to vagueness, parties should not use ambivalence as a strategy for avoiding retrospective sanctioning by voters for promise breaking. Therefore, we do not expect *globalization (trade)* to co-vary positively with ambivalence. The first model in Table 3 presents results using a measure of *ambivalence* that follows the measurement approach developed by Lo et al. (2016). As we expected, the effect of *globalization (trade)* on *ambivalence* is indeed not positive. It is, however, negative and significant, which may suggest that parties are less likely to use ambivalent language if their country is more integrated in the global economy. As we had no theoretical prior to expect this finding, we view it as highly tentative.

We also use a more fine-grained measure of *globalization* to assess the validity of our claim that political parties indeed worry about potential future electoral costs. When political parties decide on the vagueness of their statements, they face uncertainty about potential disruptions caused by globalization. To make an educated guess about the likely constraints, parties are most likely to use *de jure* indicators of globalization—including, for example, actual trade regulations, existing taxes and tariffs, as well as trade agreements—rather than indicators that are likely to shift more rapidly over time (such as actual trade flows). Indeed, our results in Models 2 and 3 of Table 3 indicate that strategic ambiguity in the form of vagueness is driven mainly by *de jure* indicators of integration, rather than *de facto* indicators of globalization.¹³

Table 3. Additional Tests

	(1)	(2)	(3)
	Ambivalence	De Jure	De Facto
Globalization	-1.066*** (0.002)	0.021*** (0.004)	0.008 (0.180)
<i>[Control Variables Omitted]</i>			
<i>N</i>	178	293	293

Robust standard errors in parentheses
 * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Turning to our control variables, we find effects of *partisan left-right ideology* on ambiguity. Political parties to the right of the ideological spectrum are significantly more ambiguous in their election programs than parties to the left, even after controlling for economic and electoral context. *Polarization* has a significant negative effect on *political ambiguity* in almost all models. The time trend is negative in most of the models, which indicates that election programs have become less ambiguous over time, which further reduces concerns that our findings on *globalization* are driven by time trends. None of the remaining control variables are significant in the main model.

In the Appendix, we present the results of additional robustness checks. Appendix B shows that the results are robust to alternative model specifications, including an instrumental variable approach (Models 1 and 2), using a generalized linear model with logit link (Model 3), estimating a parsimonious ordinary least squares (OLS) model (Model 4), using a specification with country and year fixed effects (Model 5), and using a specification with party fixed effects (Model 6).

¹³ We present the full results including control variables in Appendix G.

Appendix C probes the robustness of our results to excluding individual countries from the sample. We find that the coefficients remain remarkably stable, both in significance and substantive effects. In Appendix D we further show that the results are robust to controlling for the source of the election program, whether it be a conventional document or leader's speeches (Model 1), and removing all observations that are sourced from newspapers or speeches (Model 2). One could also be concerned that political parties are more ambiguous during times of crises. Model 3 replaces the measure of economic growth with a binary measure that takes the value 1 if *economic growth* is negative. Finally, we show that our models are robust to using a simple indicator for trade integration, measured as the sum of a country's exports and imports as share of its gross domestic product (GDP) (Model 4).

Appendix E presents the results of regressions that replace the time trend with decade fixed effects (Model 1) and year fixed effects (Model 2), with no effects on the main coefficients. We also estimated the models that exclude periods before 1990 (Model 3), 2000 (Model 4), and 2010 (Model 5). In Model 5, the significance drops just short of conventional levels ($p = 0.103$), otherwise our results are remarkably robust to these changes.

We also explored whether the incentives to use strategic ambiguity could be more prevalent for incumbent parties—because they are more sensitive to their countries' exposure to economic globalization than non-incumbents—or vary across political ideologies. To test this expectation, we add an interaction term between incumbency and globalization and an interaction term between political ideology and globalization, the results of which are summarized in marginal effects plots in Appendix F, together with the full results. Overall, the difference between incumbents and non-incumbents is statistically significant but not particularly large. Finally, the results in Figure S2 show that the effects of *political ambiguity* are not conditional on the political ideology of the political parties. Political parties across the left-right spectrum use ambiguous language if their countries are more integrated economically.

Taken together, the results provide robust and significant evidence of a substantial effect of trade globalization on the vagueness of parties' electoral appeals in their election programs. Parties in contexts that are deeply embedded in the global trade system use more ambiguous language compared to similar parties in contexts that are less exposed to international integration. These findings support our argument that parties adapt the language of their campaign statements in response to uncertainty about their ability to keep campaign promises and the associated threat of sanctioning by voters at future elections. For governments to use this strategy, ambiguity does not necessarily have to be highly effective in reducing voter support, but political parties need to have a reasonable expectation that vague language could reduce punishment at the polls. In the next section, we attempt to provide some evidence of this assumption.

Retrospective Sanctioning of Broken Promises

For the theoretical mechanism connecting globalization and ambiguity to work, parties must have a reasonably strong expectation that ambiguity reduces future electoral sanctions in response to broken promises. To test this assumption, we designed a pre-registered survey experiment that we fielded online with YouGov in the summer of 2024 sent to a sample of American citizens.¹⁴ Our focus is on internal validity; we aim to provide evidence that strategic ambiguity can reduce a voter’s resolve to sanction politicians for broken promises.

Experimental Design

We use a 3 x 2 x 2 factorial design to examine how ambiguity affects voters’ assessments of politicians. Our design builds on and adapts an existing survey experiment on election promises by Elizabeth Simas et al. (2021). Our main hypothesis is that respondents rate politicians who vote against their expectations after making clear election pledges more negatively than politicians who vote against their expectations after making vague campaign statements. A secondary hypothesis is that vagueness is more effective than ambivalence. Finally, we argue that politicians cannot avoid sanctions for breaking promises simply by blaming globalization for promise breaking. On the contrary, governing politicians’ abilities to keep their promises is an important metric for citizens to assess politicians’ competence in contexts that are exposed to economic globalization. We therefore expect respondents to punish politicians for breaking promises even when a globalization shock occurs and that the punishment is greater when the promise was concrete.

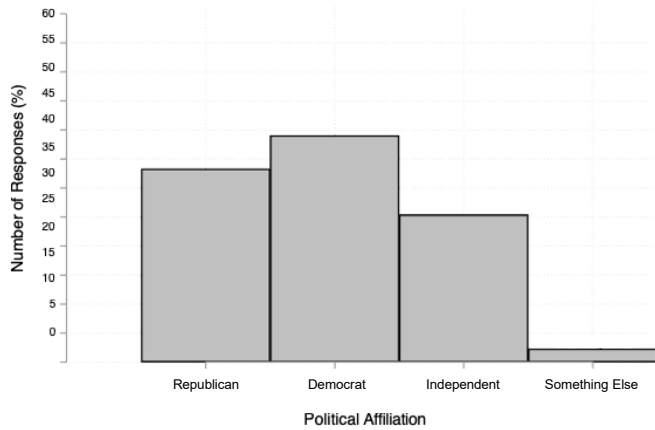
To test our expectations, we first collected information on each respondent’s party identification and position on providing tax incentives for large companies in their state.¹⁵ Figure 3 presents descriptive statistics. Our sample contains similar proportions of Republicans and Democrats with a substantial proportion of independents. The majority of respondents are somewhat in favor of tax incentives (51 percent), but there is variation in preferences in relation to corporate tax incentives across the sample.

¹⁴ The survey experiment was exempted from review by the Internal Review Board (IRB). The survey was fielded between May 21, 2024, and June 7, 2024. Respondents were recruited by YouGov, using a combination of quotas to closely match the population of adult citizens by age, gender, education, race, 2020 presidential vote, and region, based on the last census. The sample includes 4,277 respondents after removing respondents who failed the attention checks. The sample is well balanced across important characteristics. We also provide a balance table to compare our respondents across the various treatment groups in Appendix H.

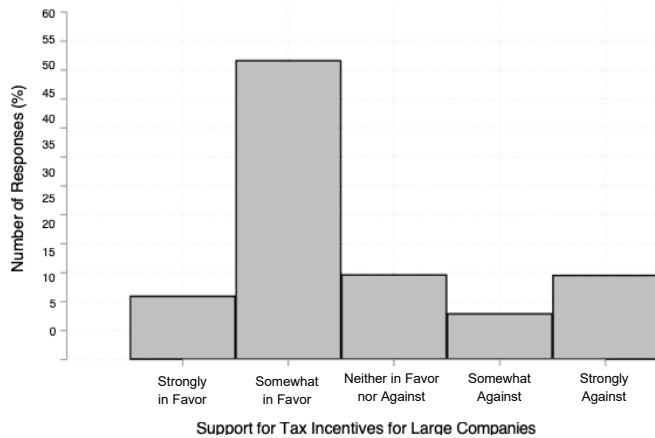
¹⁵ The full questions can be found in Appendix I. For those that initially respond “independent” or “something else” in the party identification question, we asked them if they lean either toward Democrat or Republican. Those that responded “neither” were assigned randomly to Republican and Democrat for the purpose of the treatment. The results are robust to excluding respondents who identify as independent or those that we randomly assign. See Appendix J. We applied the same procedure for the position question, asking those who neither favored nor opposed tax incentives whether they leaned one way or another.

Figure 3. Descriptives

(a)



(b)



Based on this information, we presented the respondents with a hypothetical political candidate (Gary Clark) who is running for state elections and makes statements about corporate tax policies. Corporate tax policies are arguably a hard test of the proposition that promise breaking has important consequences for citizens' support for politicians. While corporate tax policy is a salient issue, it lacks the emotive weight of social and moral issues, such as abortion or gay rights. Consequently, citizens may be more forgiving of broken promises on corporate tax policies than on other issues.

Each respondent was assigned a candidate of their own preferred political party (Republican/Democrat) and with statements that align with their preferred corporate tax policies. For example, Democrats who opposed tax breaks received a Democrat candidate who opposes tax breaks, and Republicans who opposed tax breaks received a Republican who opposes tax breaks. These two design choices allow us to have treatments free of contamination from ideology or candidate partisanship, which increases our ability to identify the effects of ambiguity.

Within those subsets, we randomized whether subjects received “clear,” “vague,” or “ambivalent” statements.¹⁶ The contents of the clear statements depend on the position of the candidate, which matches the respondent’s stated policy preference. The vague and ambivalent statements are the same for all respondents regardless of their partisanship or position. We then informed the respondents that Gary Clark won a seat in the state legislature and that the state legislature has to vote on a bill that will introduce new large tax incentives for large companies. We ask respondents to say how they expect Gary Clark to vote. Responses could range from being very confident that Clark would support the bill to being very confident that he would oppose the bill (a 5-point scale that includes the option to be unsure of how Clark would vote). This allows us to assess whether vague statements indeed reduce certainty about what politicians promise before elections (an important underlying assumption).

Our second treatment involves a globalization condition for half of our respondents (the control group did not receive any treatment and serves as our sample for testing our main hypothesis). The globalization condition introduces a globalization shock that makes the policy that Gary Clark favored (and that the respondent preferred) less feasible.¹⁷

Our third treatment is Gary Clark’s vote on the bill. We randomized respondents such that half of the respondents were informed that Gary Clark voted in favor of the bill, and half of the respondents were informed that Gary Clark voted against the bill. This means that across the possible positions in favor or against tax incentives, individuals were randomly confronted with a situation where Gary Clark broke his promise and a situation where Gary Clark kept his promise.

After we provided respondents with Gary Clark’s vote, we asked them to evaluate him on his “likeability.” Respondents could rate Gary Clark on a scale from 0 to 10 where 0 is “dislike a great deal” and 10 is “like a great deal.” For robustness, we also asked respondents whether the following phrases describe Gary Clark: someone who represents his constituents well; a politician who is open-minded; a person who lacks integrity; a politician who keeps his campaign promises; a politician who adapts well to changing circumstances; a politician who is competent.

¹⁶ See Appendix I for all statements.

¹⁷ See Appendix I for the specific wording of these conditions.

Results

Before presenting the main experimental results, we assess whether the type of statement treatment works as expected. If our argument is supported, we would expect that respondents who received a vague or ambivalent statement to be less certain about how Gary Clark would vote. Our expectation is borne out by the data. Those who received vague or ambivalent statements were significantly more likely ($p < 0.0001$) to say that they are uncertain about how Gary Clark would vote.

Moving to the main results, we first analyze whether vagueness is effective in reducing the likelihood that voters sanction politicians for broken promises in the absence of a globalization shock.¹⁸ Figure 4 presents the results graphically. The upper sub-graph compares the mean likeability scores in the scenarios where Gary Clark either voted in line with respondents' expectations after making a vague statement or kept his promise. The middle sub-graph compares the mean likeability scores in the scenarios where Gary Clark either voted against respondents' expectations or broke his promise. First, we find that respondents like politicians who break their promises significantly less, at 4.5 on our 0 to 10 likeability scale, than politicians who keep their promises, at 6.7. Similarly, the likeability of candidates who make vague statements falls from 6.7 for those who vote in line with expectations to 5 for those who do not.¹⁹ Moving to our main hypothesis, respondents rate politicians who broke clear promises significantly lower than politicians who voted against expectations after making vague promises ($p < 0.015$). Vagueness appears to be an effective way of avoiding future electoral punishment for broken promises.²⁰

Table 4 shows that these results are robust to different outcomes. Respondents who were treated with a vague statement, and then informed that Gary Clark voted against their preference on tax policies, were significantly more likely to believe that Gary Clark represented his people well, was open-minded, had integrity, was good at keeping promises, and competent than respondents who were treated with a Gary Clark who made a clear promise and then voted contrary to the promise.²¹

Finally, although our main argument and results focused on politicians' uses of vagueness, we argued that ambivalence is a less effective form of ambiguity for avoiding future retrospective sanctioning for perceived promise breaking. Figure 5 presents the results that compare politicians who made vague versus ambivalent statements.

¹⁸ Our main results are based on difference-in-means tests. We also present regression results in Appendix J.

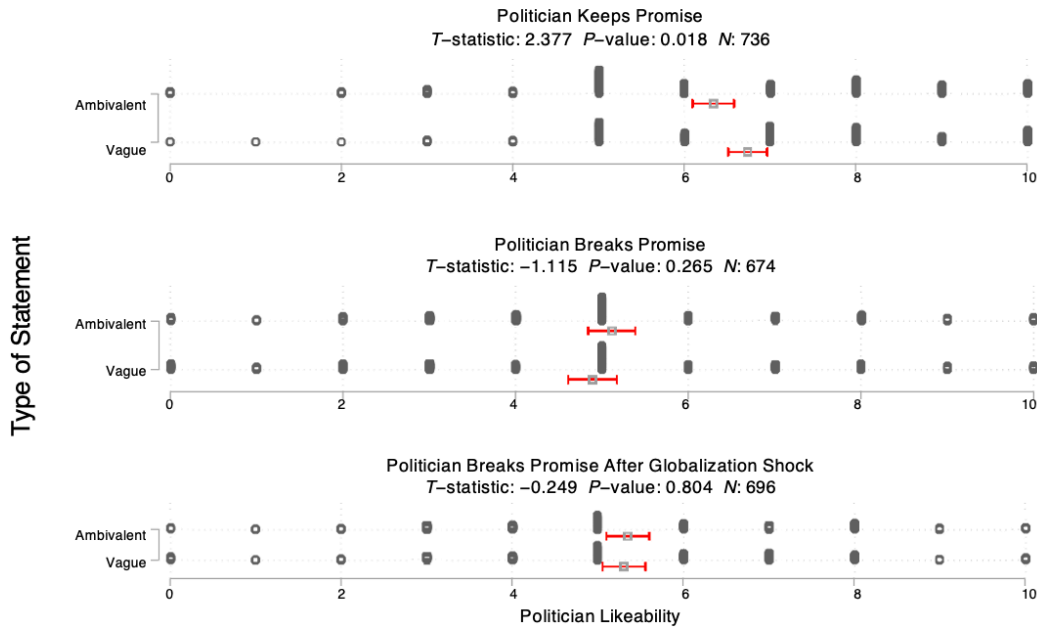
¹⁹ The difference in likeability between a politician who kept his or her promise and one who broke a promise is highly significant ($p < 0.0000$), supporting other case-specific and comparative research on the electoral effects of promise breaking (Naurin and Oscarsson 2017; Stokes 2001; Matthiess 2020).

²⁰ Note that all experimental results are robust if we consider Republicans and Democrats separately. See Appendix J.

²¹ There is no significant difference on adaptability. We expected this to matter more for the globalization treatment, but the results there were also not significant.

Contrary to our expectations, politicians who made ambivalent statements then voted contrary to expectations do not receive significantly lower likeability scores than politicians who made vague statements then voted contrary to expectations. This holds regardless of whether a globalization shock is present (lower sub-graph) or absent (middle sub-graph). Table 5 shows that the results are robust across different outcome variables.²²

Figure 5. Ambivalence vs. Vagueness



Nonetheless, in line with our main argument, voters do not in general approve of ambivalence. The likeability scores for ambivalent politicians are lower than the likeability scores for vague politicians, even when those politicians vote in line with respondents' expectations, as the upper part of Figure 5 indicates ($p < 0.018$). This finding is robust to different outcome variables, as Table 6 shows. While these particular comparisons were not pre-registered, they shed light on why politicians do not tend to increase their use of ambivalence in contexts in which governments are highly exposed to globalization, as they do in relation to vagueness.

²² Ambivalence generally reduces the voters' confidence in their ability to predict politicians' voting intentions. Moreover, respondents are not more likely to believe that a candidate who makes an ambivalent statement agrees with them than a candidate who makes a vague statement ($p < 0.9775$). Recall that our experiment presents respondents with a candidate that matches their own partisanship. While this allows us to isolate the main effect in which we are interested, it may limit the extent to which we detect the full implications of ambivalence, particularly if citizens are less forgiving of ambivalence (or inconsistency) in the statements of candidates who do not match their own partisanship.

Table 5. Alternative Dependent Variables for Ambivalence Results (Broken Promise).

	Vague	Ambivalent	Diff.	P-Value
Represents People Well	5.02	5.06	0.04	0.86
Open-Minded	5.15	5.39	0.24	0.19
Lacks Integrity	5.08	5.10	0.02	0.94
Good at Keeping Promises	4.90	4.82	-0.08	0.73
Adapts Well to Changing Circumstances	5.24	5.45	0.21	0.23
Competent	5.35	5.34	-0.01	0.97

Table 6. Alternative Dependent Variables for Ambivalence Results (Broken Promise).

	Vague	Ambivalent	Diff.	P-Value
Represents People Well	6.57	6.17	-0.40	0.02
Open-Minded	6.43	6.13	-0.30	0.05
Lacks Integrity	3.91	4.30	0.39	0.04
Good at Keeping Promises	6.45	5.79	-0.66	0.00
Adapts Well to Changing Circumstances	6.39	6.14	-0.25	0.09
Competent	6.58	6.29	-0.29	0.08

Overall, we find that strategic ambiguity matters for public support for politicians. Using vague language in campaigns allows politicians to minimize the political costs of breaking promises. These results provide the foundation for explaining the incentives that parties have to use vague language in campaign statements when their country is deeply integrated into the global economy. If politicians expect that they are less able to keep promises due to globalization, and that vague language helps them reduce the political costs, they have greater incentives to make vague campaign statements, particularly on economic policies.

Conclusion

This study identified an important implication of globalization for national democratic representation. The contents of parties' campaign promises to voters have a central place in the theory and practice of representation, because voters can select parties prospectively by comparing parties' promises with their own policy preferences and retrospectively by comparing incumbents' past campaign promises with what they actually delivered in office. The fact that countries' exposures to economic globalization increase the ambiguity of parties' electoral appeals is arguably an impediment to effective accountability, in which voters reward and punish parties electorally for their record of promise keeping and breaking in government. If it is unclear what governing parties promised during past election campaigns, voters may find it difficult to inform their decisions by incumbents' performances in this respect. Previous research on effective accountability has focused on the need for institutional clarity of responsibility, which means that government performance can be attributed clearly to a particular party. Our research suggests that the clarity of parties' campaign promises is another prerequisite for effective accountability and that parties often avoid providing such clarity when faced with the constraints of globalization.

We find robust evidence that parties make their election programs vaguer in response to the constraints of economic globalization, and that this strategy of forestalling future retrospective sanctioning can be effective. Yet, while our experimental study was designed to isolate our main treatments in terms of types of campaign statements, a range of individual-level factors affect voters' assessments of promise keeping and breaking, including party identification, political knowledge, trust in parties, and personal experiences with the issues on which the promises were made. Future research could examine how these individual-level factors interact with the level of ambiguity in campaign statements to shape citizens' evaluations of candidates' appeals and incumbents' past performances in office. By making ambiguous campaign statements, parties may avoid retrospective sanctioning for promise breaking, but at the same time wander onto unstable ground, upon which there are polarized views on incumbents' records in office. Another consequence is that the excessive ambiguity may turn voters away from mainstream parties that expect to hold office after elections. Indeed, our theory and findings suggest that incumbent governing parties are more likely to become vaguer in response to globalization than are opposition parties. This may induce voters to turn away from governing parties, adding an additional burden to the electoral cost of governing.

Notwithstanding the dangers of excessive ambiguity for the quality of democratic representation, a moderate degree of ambiguity may strengthen the effectiveness of democratic representation in a globalized world. Parties that are able to anticipate the constraints they will face when they control executive office after elections display an important aspect of governing competence. Anticipating such constraints may involve equivocating on some policy initiatives so as not to raise unrealistic expectations, even when party leaders themselves see the merits of these policies. Vague language provides governing parties with the flexibility that is often required in response to unexpected events, while acting in accordance with the general principles the party supported during the election campaign (Kartik et al. 2017). The trustee model of representation, in which elected representatives are free to exercise their judgment, is often contrasted with the delegate model, in which representatives are bound by a narrowly defined set of instructions from the electorate. In practice, modern representation involves combinations of both modes of representation. To the extent that vague language can be informative about the general principles that representatives intend to follow when in power, such campaign statements provide a way of bridging the two modes. Moreover, despite the robust positive effect of globalization on parties' use of vague language, modern election programs still contain plenty of specific election pledges that are concrete in the sense that their fulfillment is objectively testable. The factors we identified that mitigate ambiguity, including voters' aversion to excessive vagueness and parties' policy-seeking goals, are clearly not washed away by the effects of economic globalization.

The findings also have implications for understanding the phenomenon of political ambiguity. Previous research focused mainly the impact of parties' use of ambiguity on voters' perceptions of the degree of similarity between their views and those parties' policies and how this affects voters' prospective evaluations of parties. In contrast, the present study shows that ambiguity is also driven by parties' concerns about the electoral repercussions of broken promises in more complex and uncertain policy environments. While we focus on the effects of globalization on ambiguity, the argument has implications for other sources of uncertainty. Parties' uncertainty about their abilities to fulfill their campaign promises increases under a variety of conditions, including the need to work with coalition partners or domestic economic conditions. If parties expect that they will be unable to keep their campaign promises and are concerned that voters will punish them for promise breaking, they have incentives to use vagueness to limit the sanctioning mechanism of accountability.

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Supporting Information: Globalization and Political Ambiguity

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Appendix A: Discussion of Control Variables and Descriptive Statistics

To address omitted variable bias, we include control variables at the levels of countries, election years, and party programs that have been used in previous research. We control for *economic growth* with data from the World Development Indicators to account for the possibility that more robust economic growth means parties expect to be able to fulfill their election promises and are therefore less likely to use ambiguous language. We include the *effective number of parties* (Laakso and Taagepera 1979), since fewer relevant parties may impart clarity in terms of partisan divisions, reducing the imperative for parties to make concrete statements. This is measured by Gallagher et al. (2005) who use the measurement strategy of Laakso and Taagepera (1979).

At the level of election programs we control for several characteristics of the authoring parties. We control for *incumbency*, which is measured as 1 if the political party holds executive office at the time of the election campaign and 0 otherwise. *Coalition* is a binary variable that takes the value 1 if the political party is a partner in a government coalition. *Vote share* is measured as the vote share of the political party in the previous election. These three variables are all derived from CMP data (Lehmann et al. 2024). We also control for *niche party* (Meyer and Miller 2015; Bischof 2017), because niche parties may be more willing to commit to concrete positions. This is calculated by the CMP's R package ManifestoR using the measurement strategy of Bischof (2017) that conceptualizes party nicheness as a combination of unusual or unique allocations of issue area importance, as well as party specialization in a particular issue domain. The estimations further account for a logged measure of *party age*; older parties have a more established party brand, which may reduce the extent to which voters require concrete promises.

To measure *partisan left-right ideology*, we rely on the widely used left-right positions from the Manifesto Project (Lehmann et al. 2024), which are also derived from parties' election programs. These measures of parties' left-right positions are based on the Manifesto Project's thematic coding scheme, into which each sentence or quasi-sentence of the program is allocated to a thematic category. The left-right score is based on the proportion of text the party devotes to themes considered right-wing themes minus the proportion of text it devotes to themes considered left-wing themes. We include a measure of *polarization* at the level of election years based on parties' left-right positions, again from the CMP dataset (Lehmann et al. 2024), using an established measure of polarization (Laver and

Budge 1992; Ezrow 2007). Increased polarization may serve to make party “brands” more informative to voters (Snyder and Ting 2002) and as such affect the extent to which concrete statements are necessary to convey policy positions (Eichorst and Lin 2019).

S1. Descriptive statistics for variables used in the models

	Mean	SD	Min.	Max.
Political Ambiguity	.6269933	.098518	0	1
Trade Globalization	-.069482	.9875945	-2.041856	1.944043
Incumbency	.3617747	.4813362	0	1
Economic Growth	-.0846363	.868088	-1.938084	5.39707
Polarization	.0193846	1.046803	-1.614605	3.121463
Vote Share	-.0884456	.9253043	-1.919535	3.956128
Party Age	.2732554	.7098771	-1.973304	1.353628
Niche Party	-.0233023	.8780589	-2.630131	2.81908
Coalition	.1672355	.3738245	0	1
EU Member	.3720137	.4841689	0	1
Left-Right Ideology	.0492567	1.006233	-2.09246	2.814082
Effective # of Parties	-.039105	.8924371	-1.647302	4.059958
<i>N</i>	293			

Appendix B. Model Specification

S2. Robustness check results

	(1)	(2)	(3)	(4)	(5)	(6)
	IV I	IV II	GLM	OLS	Country & Year FE	Party FE
Globalization	0.011** (0.015)	0.004** (0.014)	0.222*** (0.005)	0.051*** (0.007)	0.220** (0.045)	0.322** (0.019)
Incumbent	-0.048 (0.139)	-0.018 (0.145)	-0.077 (0.144)	-0.018 (0.158)	-0.042 (0.515)	0.067 (0.519)
Economic Growth	0.003 (0.836)	0.001 (0.857)	0.004 (0.869)	0.001 (0.894)	-0.007 (0.845)	-0.003 (0.928)
Polarization	-0.024* (0.084)	-0.009* (0.082)	-0.039* (0.079)	-0.009* (0.086)	0.071 (0.150)	-0.042 (0.150)
Vote Share	-0.037* (0.069)	-0.014* (0.070)	-0.059* (0.069)	-0.014* (0.080)	-0.059 (0.120)	-0.063** (0.036)
Party Age	-0.012 (0.598)	-0.004 (0.603)	-0.019 (0.614)	-0.004 (0.621)	-0.044 (0.333)	0.191 (0.250)
Niche Party	0.010 (0.598)	0.004 (0.604)	0.016 (0.589)	0.004 (0.611)	-0.017 (0.667)	-0.046 (0.402)
Coalition	0.005 (0.918)	0.002 (0.919)	0.008 (0.918)	0.002 (0.915)	0.112 (0.363)	0.027 (0.833)
Left-Right Ideology	0.056*** (0.001)	0.021*** (0.001)	0.090*** (0.001)	0.021*** (0.001)	0.074** (0.027)	0.129** (0.014)
Effective # of Parties	0.016 (0.558)	0.006 (0.540)	0.028 (0.514)	0.007 (0.510)	0.058 (0.343)	0.067 (0.338)
Time Trend	-0.006*** (0.002)	-0.002*** (0.002)	-0.009*** (0.000)	-0.002*** (0.001)		-0.013** (0.011)
Constant	11.924*** (0.002)	4.952*** (0.000)	19.346*** (0.000)	4.980*** (0.000)	1.470*** (0.000)	26.138** (0.010)
Wald Test	52.176***	54.499***	54.980***		308.574***	14497.836***
<i>N</i>	293	293	293	293	293	293

Robust standard errors in parentheses

* $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Note: For Models 1 and 2, we follow Lang and Tavares (2024) and instrument globalization with a measure of the country-period specific, inverse-distance weighted average of the lagged globalization scores of all other countries (see also Acemoglu et al. (2019) who use a similar instrument in a different context). The instrument is a strong predictor of globalization (consistent with the idea that globalization diffuses across borders across periods especially in close geographic proximity). It is also plausibly excludable, because prior globalization in neighboring countries only affects political ambiguity through globalization and not through alternative causal pathways. Model 1 uses a fractional response probit model and Model 2 uses a 2SLS instrumental-variable regression model. The effect of globalization is robust using this instrumental-variable approach.

Appendix C. Jackknife

S3. Jackknife results

	(1) USA	(2) Ireland	(3) Australia	(4) New Zealand	(5) Canada
Globalization	0.380*** (0.008)	0.362** (0.025)	0.244* (0.054)	0.440*** (0.008)	0.473** (0.010)
Incumbent	-0.052 (0.530)	-0.110** (0.047)	-0.039 (0.632)	-0.027 (0.725)	-0.048 (0.564)
Economic Growth	0.020 (0.545)	0.002 (0.963)	0.010 (0.750)	0.014 (0.753)	0.010 (0.752)
Polarization	-0.053* (0.054)	-0.055* (0.075)	-0.038 (0.205)	-0.015 (0.600)	-0.042 (0.118)
Vote Share	-0.041 (0.300)	-0.076* (0.051)	-0.030 (0.508)	-0.011 (0.842)	-0.050 (0.229)
Party Age	-0.057 (0.293)	-0.038 (0.402)	-0.051 (0.472)	-0.047 (0.436)	-0.042 (0.470)
Niche Party	-0.038 (0.513)	-0.008 (0.854)	-0.014 (0.881)	-0.064 (0.366)	-0.042 (0.496)
Coalition	0.119 (0.382)	0.075 (0.713)	0.159 (0.141)	0.165 (0.341)	0.102 (0.429)
Left-Right Ideology	0.109*** (0.007)	0.141*** (0.000)	0.081** (0.029)	0.080* (0.070)	0.119*** (0.002)
Effective # of Parties	0.071 (0.435)	-0.002 (0.974)	0.069 (0.479)	0.108 (0.390)	0.073 (0.427)
Time Trend	-0.013*** (0.000)	-0.012*** (0.002)	-0.010*** (0.002)	-0.016*** (0.002)	-0.014*** (0.001)
Constant	26.630*** (0.000)	24.947*** (0.001)	20.699*** (0.002)	33.021*** (0.002)	28.471*** (0.001)
Wald Test	47.331***	44.710***	44.410***	25.988**	49.535***
<i>N</i>	269	242	229	230	263

Robust standard errors in parentheses

* $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Appendix D. Explanatory Variables

S4. Alternative explanatory variables and sources

	(1) Source	(2) Source II	(3) Crisis	(4) Trade
Globalization	0.353*** (0.007)	0.219* (0.081)	0.367*** (0.007)	0.008* (0.070)
Incumbent	-0.044 (0.556)	-0.024 (0.751)	-0.060 (0.397)	-0.045 (0.524)
Economic Growth	0.003 (0.918)	0.003 (0.921)		-0.096* (0.085)
Polarization	-0.031 (0.237)	-0.037 (0.157)	-0.044* (0.087)	-0.027 (0.289)
Vote Share	-0.045 (0.256)	-0.031 (0.453)	-0.043 (0.269)	-0.083** (0.038)
Party Age	-0.066 (0.204)	-0.043 (0.463)	-0.051 (0.327)	-0.039 (0.441)
Niche Party	-0.041 (0.492)	-0.012 (0.873)	-0.039 (0.509)	-0.046 (0.387)
Coalition	0.090 (0.468)	0.124 (0.226)	0.130 (0.344)	0.122 (0.381)
Left-Right Ideology	0.087*** (0.010)	0.074** (0.021)	0.106*** (0.004)	0.103*** (0.006)
Effective # of Parties	0.096 (0.285)	0.082 (0.358)	0.078 (0.313)	0.015 (0.824)
Time Trend	-0.012*** (0.000)	-0.010*** (0.005)	-0.012*** (0.001)	-0.006* (0.055)
News Source	0.090 (0.652)			
Speech Source	0.413* (0.068)			
Crisis			0.079 (0.339)	
Constant	25.031*** (0.000)	19.601*** (0.004)	24.980*** (0.000)	11.154** (0.047)
Wald Test	53.681***	43.822***	51.718***	45.499***
N	293	251	293	312

Robust standard errors in parentheses

* $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Appendix E. Modeling Time

S5. Different specifications of time fixed effects

	(1)	(2)	(3)	(4)	(5)
	Decade FE	Year FE	1990s	2000s	2010s
Globalization	0.304*** (0.008)	0.220** (0.045)	0.378* (0.056)	0.401* (0.103)	0.910** (0.013)
Incumbent	-0.049 (0.488)	-0.042 (0.515)	-0.002 (0.981)	-0.003 (0.956)	0.021 (0.751)
Economic Growth	0.003 (0.919)	-0.007 (0.845)	-0.003 (0.945)	0.056 (0.337)	0.116 (0.196)
Polarization	-0.045* (0.075)	0.071 (0.150)	-0.042 (0.311)	-0.096** (0.037)	-0.192*** (0.006)
Vote Share	-0.033 (0.411)	-0.059 (0.120)	-0.022 (0.629)	-0.067* (0.086)	-0.077 (0.119)
Party Age	-0.043 (0.386)	-0.044 (0.333)	-0.084 (0.153)	-0.060 (0.197)	-0.055 (0.371)
Niche Party	-0.040 (0.491)	-0.017 (0.667)	-0.059 (0.407)	0.021 (0.639)	-0.030 (0.595)
Coalition	0.102 (0.432)	0.112 (0.363)	0.133 (0.389)	0.059 (0.754)	0.034 (0.868)
Left-Right Ideology	0.109*** (0.004)	0.074** (0.027)	0.098** (0.031)	0.152*** (0.001)	0.162*** (0.010)
Effective # of Parties	0.066 (0.466)	0.058 (0.343)	0.088 (0.420)	-0.014 (0.816)	-0.055 (0.607)
Time Trend			-0.009* (0.082)	-0.012 (0.122)	-0.013 (0.167)
Constant	0.720*** (0.000)	1.470*** (0.000)	18.633* (0.076)	24.106 (0.116)	26.812 (0.169)
Wald Test	51.067***	308.574***	31.029**	50.817***	46.827***
N	293	293	241	186	136

Robust standard errors in parentheses

* $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Appendix F. Interaction Effects

S6. Incumbency and ideology interaction effects

	(1)	(2)
	Incumbent	Rile
Globalization	0.318** (0.031)	0.376*** (0.008)
Incumbent	-0.018 (0.826)	-0.058 (0.420)
Incumbent=1 × Globalization	0.133* (0.056)	
Globalization × Left-right Ideology		0.001 (0.988)
Economic Growth	0.026 (0.407)	0.022 (0.507)
Polarization	-0.050* (0.053)	-0.046* (0.075)
Vote Share	-0.040 (0.307)	-0.043 (0.276)
Party Age	-0.056 (0.304)	-0.054 (0.309)
Niche Party	-0.030 (0.602)	-0.038 (0.519)
Coalition	0.072 (0.611)	0.127 (0.353)
Left-Right Ideology	0.105*** (0.004)	0.106*** (0.008)
Effective # of Parties	0.058 (0.490)	0.063 (0.466)
Time Trend	-0.012*** (0.001)	-0.013*** (0.001)
Constant	24.270*** (0.001)	25.427*** (0.000)
Wald Test	51.489***	50.710***
<i>N</i>	293	293

Robust standard errors in parentheses

* $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Figure S1. Marginal Effects Plot for Trade Globalization and Incumbency

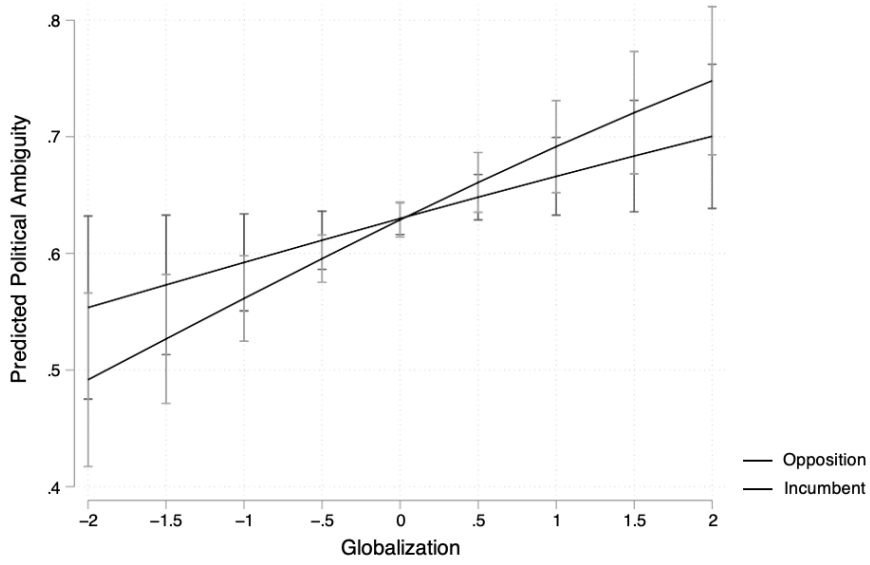
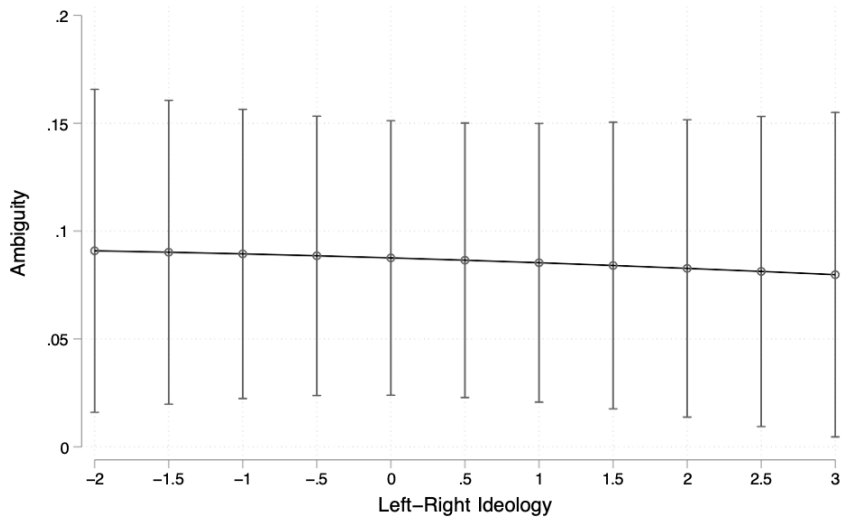


Figure S2. Marginal Effects Plot for Trade Globalization and Incumbency



Appendix G. Full Model Results

Table S7. Full Results Table 2

	(1)	(2)	(3)
	Economic	Foreign	Social
Globalization	0.307** (0.025)	-1.024 (0.126)	-0.015 (0.884)
Incumbency	-0.064 (0.107)	-0.061 (0.660)	0.066* (0.066)
Economic Growth	0.013 (0.754)	-0.150 (0.360)	-0.058* (0.055)
Polarization	-0.029 (0.470)	0.062 (0.575)	-0.038** (0.031)
Vote Share	0.040** (0.035)	-0.040 (0.536)	-0.022 (0.377)
Party Age	0.014 (0.696)	-0.334* (0.071)	-0.048* (0.057)
Niche Party	0.005 (0.889)	-0.191* (0.086)	-0.004 (0.803)
Coalition	0.055 (0.510)	-0.388 (0.426)	0.002 (0.970)
Left-Right Ideology	0.051** (0.045)	0.176 (0.415)	0.025 (0.220)
Effective # of Parties	0.100** (0.016)	0.169 (0.416)	0.064** (0.048)
Time Trend	-0.007* (0.071)	0.026 (0.149)	0.001 (0.599)
Constant	15.092** (0.047)	-50.697 (0.162)	-1.532 (0.787)
Wald Test	66.675***	10.224	57.758***
<i>N</i>	124	115	124

Robust standard errors in parentheses

* $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Table S8. Full Results Table 3

	(1) Ambivalence	(2) De Jure	(3) De Facto
Globalization	-1.066*** (0.002)	0.021*** (0.004)	0.008 (0.180)
Incumbent	0.130 (0.749)	-0.065 (0.355)	-0.059 (0.396)
Economic Growth	-0.124 (0.545)	0.027 (0.378)	0.001 (0.972)
Polarization	-0.052 (0.662)	-0.048* (0.063)	-0.052** (0.042)
Vote Share	-0.011 (0.872)	-0.045 (0.248)	-0.027 (0.514)
Party Age	0.066 (0.539)	-0.052 (0.331)	-0.052 (0.328)
Niche Party	-0.174** (0.019)	-0.039 (0.501)	-0.038 (0.535)
Coalition	-0.020 (0.957)	0.135 (0.327)	0.141 (0.332)
Left-Right Ideology	-0.144 (0.113)	0.100*** (0.007)	0.105*** (0.006)
Effective of Parties	0.227 (0.328)	0.043 (0.593)	0.097 (0.292)
Time Trend	0.027* (0.081)	-0.013*** (0.000)	-0.005** (0.015)
Constant	-51.823* (0.092)	24.657*** (0.000)	10.862** (0.012)
Wald Test		52.408***	46.493***
N	178	293	293

Robust standard errors in parentheses

* $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$

Appendix H. Balance Tests

Table S9. Descriptive Statistics and Balance (Treatment is Promise Broken)

	N	Control		Treatment			Diff.
		mean	SD	N	Mean	SD	
Age	2058	2.32	0.77	2167	2.32	0.77	0.00
Gender	2059	1.56	0.52	2155	1.56	0.53	0.01
Income	2060	2.24	0.96	2167	2.23	0.97	-0.01
Education	2060	2.29	1.07	2167	2.26	1.06	-0.03
Partisan Affiliation	2060	1.97	0.83	2167	1.96	0.82	-0.01
Tax Position	1571	2.66	1.23	1616	2.61	1.21	-0.04

* $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$.

Table S10. Descriptive Statistics and Balance (Treatment is Promis Vague)

	N	Control		Treatment			Diff.
		Mean	SD	N	Mean	SD	
Age	1407	2.32	0.77	1417	2.30	0.77	-0.02
Gender	1404	1.55	0.52	1413	1.54	0.54	-0.01
Income	1407	2.25	0.97	1418	2.22	0.94	-0.03
Education	1407	2.24	1.05	1418	2.31	1.08	0.06
Partisan Affiliation	1407	1.97	0.82	1418	1.97	0.81	0.00
Tax Position	1083	2.66	1.21	1062	2.66	1.24	-0.00

* $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$

Appendix I. Experimental Treatments

Partisan Question

In politics today, do you consider yourself a Republican, a Democrat, an independent, or something else?

Responses: Republican, Democrat, independent, something else.

Position on Corporate Tax Policies

We are interested in your opinion about tax incentives or tax breaks for large companies. Some argue that tax incentives for large companies are good because they encourage companies to stay in the state, contributing to economic growth and job creation. Others argue that tax incentives are bad because they often fail to produce jobs and they reduce government revenues for policies to stimulate economic growth, create jobs, and provide public services including education. State legislatures consider tax incentives for large companies on a regular basis. In general, are you in favor or against tax incentives for large companies in your state?

Responses: strongly in favor, somewhat in favor, neither in favor nor against, somewhat against, strongly against.

Type of Statement Treatment

We would now like you to consider the following hypothetical scenario. Gary Clark was a [Democratic/Republican] candidate for the state legislature. During the campaign, he made several statements about corporate tax policies, including the following statements:

[Randomize the following three treatments across respondents who are against tax incentives]:

[T1: Clear Statement] “We need to make sure that large companies pay their fair share in our state, so that we can invest in policies that promote economic growth and give hard-working Americans the chance to join or maintain their place in the middle class. I will fight to end tax breaks for large companies in our state.”

“Time and time again, we see that tax incentives for large companies do not pay off in real economic gains and often fail to produce jobs. We need to end corporate tax breaks to ensure that large companies pay their fair share and contribute to the well-being of Americans in our state.”

[T2: Vague Statement] “We must invest in policies that promote economic growth and give hard-working Americans the chance to join or maintain their place in middle class. We need corporate tax policies that ensure we reach this goal.”

“My priority is the well-being of my fellow Americans. I support tax policies on large companies that help our economy to grow and create new jobs.”

[T3: Ambivalent Statement] “We need to make sure that large companies pay their fair share so that we can invest in policies that promote economic growth and give hard-working Americans the chance to join or maintain their place in the middle class. I will oppose unfair tax breaks for large companies in our state.”

“Time and time again, we see that tax incentives to large companies have paid off in real economic gains and the creation of jobs. I will support corporate tax incentives to ensure that large companies remain in our state and contribute to the well-being of my fellow Americans.”

[Randomize across respondents who are in favor of tax incentives – only T1 is different from above; T2 and T3 are identical to the above]:

[T1: Clear Statement] “We must promote economic growth, create new jobs, and give hardworking Americans the chance to join or maintain their place in the middle class. I will fight to expand tax incentives for large companies in our state, so they stay and grow, and contribute to this goal.”

“Time and time again, we see that tax incentives for large companies pay off in real economic gains and job creation. We need to expand corporate tax incentives to ensure that large companies remain and contribute to the well-being of Americans in our state.”

Vote Intention Question

Gary Clark won a seat in the state legislature. Now, the state legislature has to vote on a bill that will introduce new large tax incentives for large companies. How you think [Democrat/Republican] Gary Clark will vote.

Responses: I am very confident that Gary Clark will vote FOR the legislation, I am confident that Gary Clark will vote FOR the legislation, I am confident that Gary Clark will vote AGAINST the legislation, I am very confident that Gary Clark will vote AGAINST the legislation, I am unsure how Gary Clark will vote.

Globalization Shock Treatment

[Randomize across respondents who are against tax incentives]:

T1 (Control): No Statement

T2: Between the election campaign and the vote, large companies began moving their operations to foreign countries that offered new tax incentives. This threatened to increase unemployment and the state's ability to fund public services because of falling tax revenues. This was a big part of the debate on the bill introducing new large tax incentives for large companies. Some people who were previously against tax incentives for large companies now argued in favor of them in this new situation.

[Randomize across respondents who are in favor of tax incentives]:

T1 (Control): No Statement

T3: Between the election campaign and the vote, the global economy and our main overseas markets took a significant downturn. This threatened to increase unemployment and the state's ability to fund public services because of falling tax revenues. This was a big part of the debate on the bill introducing new large tax incentives for large companies. Some people who were previously in favor of tax incentives for large companies now argued against them in this new situation.

Politician Vote Treatment

[Randomize half of the respondents into the in for/against voting conditions]:

Gary Clark voted [for/against] the bill introducing large tax incentives

Appendix J. Experiment Additional Results

Table S11. Main Results without Independent Respondents

	Concrete	Vague	Diff.	P-Value
Vagueness/Broken Promise/No Shock	4.48	5.10	0.62	0.02
Vagueness/Broken Promise/Shock	4.48	5.10	0.62	0.02
	Vague	Ambivalent	Diff.	P-Value
Ambivalence/Broken Promise/No Shock	5.10	5.21	0.10	0.67

Table S12. Main Results without Undecided Respondents

	Concrete	Vague	Diff.	P-Value
Vagueness/Broken Promise/No Shock	4.40	4.97	0.57	0.01
Vagueness/Broken Promise/Shock	4.93	5.28	0.35	0.09
	Vague	Ambivalent	Diff.	P-Value
Vagueness/Broken Promise/No Shock	4.97	5.10	0.13	0.54

Table S13. Main Results Split by Partisanship

	Concrete	Vague	Diff.	P-Value
Republican/Broken Promise/No Shock	4.29	4.85	0.56	0.03
Democrat/Broken Promise/No Shock	4.37	4.89	0.52	0.01
Republican/Broken Promise/Shock	4.86	5.37	0.51	0.03
Democrat/Broken Promise/Shock	4.81	5.31	0.50	0.01
	Vague	Ambivalent	Diff.	P-Value
Ambivalence/Republican/Broken Promise/No Shock	4.85	5.04	0.19	0.42
Ambivalence/Democrat/Broken Promise/No Shock	4.89	5.11	0.22	0.27

Table S14. Main Results with OLS Estimation

	(1)	(2)	(3)	(4)
Vague	-0.010 (0.192)		-0.176 (0.178)	
Broken Promise	-2.382*** (0.193)	-1.850*** (0.184)	-1.842*** (0.181)	-1.161*** (0.174)
Vague × Broken Promise	0.532** (0.272)		0.681*** (0.255)	
Ambivalent		-0.402** (0.180)		-0.179 (0.174)
Ambivalent × Broken Promise		0.625** (0.260)		0.224 (0.248)
Constant	6.751*** (0.137)	6.742*** (0.129)	6.648*** (0.124)	6.472*** (0.124)
<i>F</i>	83.654***	48.575***	48.751***	24.264***
<i>N</i>	1402	1410	1423	1410

Standard errors in parentheses

** $p < 0.05$, *** $p < 0.01$