Majority Lost: Global Evidence and Field Experiments on Electoral Miscoordination *

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Abstract

We study how often and why voters in multiparty systems fail to coordinate on majority-preferred parties, and whether low-cost viability information can mitigate these failures. Combining CLEA, V–Party, MARPOR, and WPID, we construct cross-national indicators of weak and strong coordination failures and show they are widespread, shaped by institutions and party organization, and systematically disadvantage fragmented opposition and culturally liberal parties. Four constituency-level polling experiments in Indian state elections reveal precisely estimated null effects of locally tailored viability information on vote intentions and preferences, despite modest belief updating, highlighting binding expressive motives and limits to polls as coordination devices.

Keywords: Condorcet Winner, Coordination among voters, Polls
JEL Classification codes: D72, K16, P17

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1 Introduction

Voters in multi-party systems often face a coordination problem: many share broad preferences but disperse their support across ideologically similar parties, enabling less-preferred options to prevail even when they represent only a minority. Although strategic voting can, in principle, alleviate this friction (Duverger's law; Duverger, 1954; Cox, 1997), doing so requires information about candidates' viability—information that is typically imperfect and unevenly distributed. When such informational gaps persist, even small frictions can generate substantial "wasted votes," meaning ballots cast for contenders with little chance of success. These dynamics are further compounded by expressive motives, which can shape both turnout and vote choice, particularly in two- or three-candidate runoffs (Pons and Tricaud, 2018a).

We define two sets of election events. First, weak coordination failures arise when a Condorcet winner exists—that is, the party that would defeat every other party in head-to-head majority contests, but it does not win. Second, strong coordination failures occur when the winner is the Condorcet loser—that is, the party that would lose to every other party in all pairwise majority contests, if such a party exists. These failures matter because they can distort representation, shift policy, and—by advantaging well-organized or incumbent actors—reshape patterns of political competition (Ferlenga et al., 2025).

A growing body of evidence helps clarify how such outcomes emerge. Laboratory and theoretical research shows that when information about candidates' viability is scarce or noisy, coordination becomes fragile and even dominated options may prevail (Forsythe et al., 1993, 1996; McKelvey and Ordeshook, 1985). Complementing this insight, work on alternative voting rules demonstrates that mechanisms such as Approval Voting or Borda can mitigate information imperfections and help implement the Condorcet winner in divided-majority environments (Granić, 2017). Relatedly, improvements in poll design—for example, eliciting pairwise preferences—can also promote majority-rule outcomes by identifying Condorcet winners in settings where preference cycles are uncommon (Potthoff, 2011).

In this paper, we ask three questions: How common are voter coordination failures across democracies, what explains their occurrence, and can low-cost information—such as polling—mitigate them in real-world settings? Our approach

combines new cross-national measures with targeted field experiments that deliver viability information at scale, allowing us to examine both the prevalence and the tractability of these failures.

To construct these measures, we assemble constituency-level election data from the Constituency-Level Elections Archive (CLEA) (Kollman et al., 2020). We link these outcomes to party characteristics and ideological positions from V–Party v2 (Lindberg et al., 2022) and the MARPOR/Manifesto Corpus (Lehmann et al., 2025). To account for socio-demographic context and voter heterogeneity, we incorporate information from the World Political Cleavages and Inequality Database (WPID) (Gethin et al., 2021). Finally, we proxy institutional and development histories using years of continuous democracy (Boix et al., 2013) and GDP per capita (PPP) from Eurostat et al. (2025), supplemented with Gapminder Foundation (2025). Together, these inputs allow us to build comparable indicators of coordination failure and its correlates across countries and over time.

We document four main patterns. First, coordination failures are widespread. Between 1940 and 2020, average weak failure rates range from 20% to 30% of the total elections and appear on every continent; the series also shows substantial persistence across decades. Second, institutional design shapes these outcomes: plurality systems exhibit the highest failure rates, followed by ranked-choice and mixed systems, whereas runoff systems display the lowest, in line with classic strategic-coordination logic (Duverger, 1954; Cox, 1997). Third, fragmentation of the political landscape is strongly and positively associated with failure, while economic development shows no robust partial correlation once election fixed effects are included; the age of democracy, by contrast, correlates slightly positively. Finally, the distributional consequences of miscoordination are patterned: the parties that tend to lose are often opposition, stigmatized ("pariah"), or culturally liberal, whereas the beneficiaries are typically organizationally strong or locally embedded. These asymmetries align with theories linking organization and mobilization to electoral performance under uncertainty (Panebianco, 1988; Tavits, 2012; Kitschelt and Wilkinson, eds, 2007).

Beyond documenting their prevalence, it is also important to clarify why coordination failures matter normatively and for public policy. First, they are not simply technical inefficiencies arising from particular voting rules; rather, they reshape democratic representation in systematic ways. By advantaging organizationally strong, locally embedded, or anti-pluralist actors and disadvantaging fragmented

opposition or culturally liberal parties, miscoordination can generate a persistent representational bias even when all voters behave sincerely. Second, the stakes extend beyond ideological distance from the median voter. When a Condorcet winner fails to win—or when a Condorcet loser gains office—the resulting government does more than implement policies that differ from the median voter's ideal point: it violates majority preferences over feasible alternatives. In such cases, the governing party may enact policies that, in pairwise comparison, a majority would prefer to replace with those of another party. This creates direct welfare costs, as policies diverge from majority-preferred outcomes, and raises concerns about democratic legitimacy, since governments emerging from strong coordination failures lack majority support in any head-to-head contest against their competitors.

We then examine whether targeted viability information can reduce miscoordination. To do this, we field four survey experiments in India—an archetypal high-stakes, first-past-the-post, multi-party democracy with coordination challenges comparable to those in the UK, Canada, and Australia. The Indian context features dense multi-party competition, frequent viable third parties, and substantial shares of undecided voters, making it a demanding environment in which to test coordination interventions. Each experiment relies on two phone surveys conducted in constituencies across four states (Bihar, Delhi, Telangana, and Uttar Pradesh), in which respondents are randomly assigned to receive or not receive constituency-level "polls" constructed from baseline voting intentions. This design allows us to isolate how locally relevant viability information shapes voters' choices in settings where coordination is typically difficult.

Across these states, however, we find precisely estimated null effects of constituency-level polls on key behavioral outcomes. Receiving viability information does not measurably shift party-specific voting intentions (2pp shift towards top 2 parties), nor does it change parties' positions in respondents' rankings or their affective ratings. Interaction terms between treatment and pre-treatment party preferences are small and statistically indistinguishable from zero, allowing us to rule out moderate persuasion effects for both major and minor parties. At the belief level, respondents already anticipate substantial support for the top two parties even without treatment, and the polls only modestly reinforce these expectations. When we focus on the voters unsure at baseline, those are 7 percentage points more likely to vote for a top 2 party once they receive the polls as treatment. When asked which considerations matter for their vote choice, treated respondents look much like controls, and

concerns about "wasting" a vote do not emerge as dominant or uniquely salient. Taken together, these experiments indicate that although voters behave as if they understand which parties are viable, expressive motives and durable party attachments largely persist in the face of viability information; in this context, low-cost polls do not overcome expressive voting or induce sizable strategic defection from dominated options. We explore the role of alternative mechanisms that might be driving our results.

These findings qualify the role of polls as a coordination device. In principle, polls offer a scalable, low-cost means of reducing coordination failures by clarifying viability rather than attempting persuasion, and our design follows best practices by highlighting local top-two status and uncertainty, timing information release close to voting, and focusing on voters most at risk of wasting their votes. However, in practice, Indian experiments show that even sharply targeted viability signals leave intended votes, party rankings, and stated decision criteria largely unchanged, while only modestly updating expectations about others' behavior.

The most direct interpretation of these null behavioral effects is not that voters ignore viability information, but that the information we provide is typically too weak—relative to expressive and partisan payoffs—to overturn established voting intentions in high-salience first-past-the-post contests. In our setting, many voters already have reasonably accurate priors about which parties are viable, so constituency polls mainly refine second-order beliefs at the margin rather than meaningfully changing perceived pivotality. When expressive attachments are strong, such modest changes in perceived closeness are unlikely to generate large-scale strategic defection from dominated options. This helps explain why coordination failures can persist even when "viability" is widely understood: the binding constraint is not only uncertainty, but also the limited behavioral leverage of small informational refinements in electorates where preferences are identity-laden and stable.

Our experimental design focuses on a demanding coordination environment; therefore, we interpret the null effects as identifying meaningful boundary conditions on when viability information can influence vote choice. At the same time, equilibrium responses can still produce momentum and bandwagon dynamics (Denter and Sisak, 2015; Meffert et al., 2011) as well as strategic-turnout externalities (Großer and Schram, 2010), underscoring the value of transparent intervals and constituency-level granularity in reporting. Our evidence, however, suggests that

these forces may operate through channels other than substantial shifts in intended vote choice.

We develop a simple model of voting with expressive motives and poll information that rationalizes the experimental findings in Section 4: (i) constituency-level polls modestly update beliefs about the relative strength of the top two parties; (ii) vote intentions, rankings, and affective ratings are essentially unchanged; and (iii) stated decision criteria—including concerns about "wasting" one's vote—are unaffected. The framework nests fulfilled-expectations models with polls in the spirit of McKelvey and Ordeshook (1985) and mixed expressive–instrumental utility approaches to voting (Brennan and Lomasky, 1993).

A natural question is why these sharply estimated null effects differ from the sizable coordination responses found in laboratory settings and from the smaller but detectable shifts documented in observational studies. Laboratory experiments place subjects in environments with minimal expressive attachments, clearly defined payoff structures, and repeated feedback about others' behavior—conditions that reliably induce strategic defection when viability signals are introduced (Forsythe et al., 1993, 1996; McKelvey and Ordeshook, 1985). In contrast, our field context features entrenched partisan identities, strong expressive motives, and voters who already possess reasonably accurate priors about which parties are viable, leaving limited room for modest informational nudges to shift intended votes.

Observational evidence from settings with weaker partisan loyalties or more fluid party systems—for example, polling exposure in Swiss referendums studied by Bursztyn et al. (2024)—does show modest belief updating and occasional reallocation toward leading options, but even these studies stop short of detecting large changes in vote intentions. Taken together, the comparison suggests that coordination effects identified in controlled laboratory environments may hinge on conditions—low expressive attachment, sharp incentives, limited prior information—that are attenuated in high-salience multiparty contests such as India's state elections, where preferences and beliefs are already well formed and strategic adjustments confront stronger psychological and partisan frictions.

We contribute on three fronts. Although existing theories of strategic coordination emphasize the mechanical and psychological pressures toward two-party competition under plurality rule (Duverger, 1954; Cox, 1997; Laakso and Taagepera, 1979), they do not provide a systematic way to identify or quantify the severity of coordination breakdowns across settings. We provide cross-national measurement

of voter coordination failures and their correlates using CLEA, V–Party, MARPOR, and WPID—mapping where and when coordination frictions bite, and which parties gain or lose.

Second, we contribute to the work on party systems, polarization, and churn (Harmel and Robertson, 1985; Mainwaring and Zoco, 2007; Mair, 1997; Sartori, 1976; Dalton, 2008; Benoit and Laver, 2006) and to the work on coordination and incumbency advantage (Ferlenga et al., 2025). Our results challenge a core assumption in the literature—that party size is the primary correlate of coordination success or failure. Classic theories predict that large, established parties benefit mechanically from strategic desertion, while small parties are disadvantaged as voters converge on the top two competitors. In contrast, our cross-national findings show that organizational capacity, rather than size alone, is strongly associated with gaining from coordination failures. This pattern is not anticipated by canonical accounts of strategic coordination but aligns with organizational theories of electoral mobilization (Panebianco, 1988; Tavits, 2012; Kitschelt and Wilkinson, eds, 2007).

Third, we extend the experimental literature on polls and information by documenting a large-scale field setting in which carefully designed, constituency-level poll information leaves *intended* votes and *preferences* effectively unchanged—despite modest shifts in second-order beliefs—thus providing a disciplined null result that helps delineate when polls can, and cannot, mitigate miscoordination in multiparty elections (Agranov et al., 2018; Kittel et al., 2014; Großer and Schram, 2010; Potthoff, 2011; Meffert et al., 2011; Bursztyn et al., 2024; Alabrese and Fetzer, 2024).

The paper proceeds as follows: Section 2 discusses the observational data used; Section 3 shows the descriptive evidence around the coordination failure; Section 4 discusses how an experiment using polls can solve the issue; Section 5 relates our experiment findings with those previously found in the literature; Section 6 concludes.

2 Data

2.1 Secondary data

Our corpus of constituency-level electoral results is compiled via the *Constituency-Level Elections Archive* (*CLEA*) *Version 20201216* (Kollman et al., 2020).[1]

[1]CLEA collates systematically collected information on electoral outcomes, vote shares, party performance, and electoral institutions across democratic and non-democratic regimes worldwide.

To compile information on party characteristics and policy stances we use two sources. The first is the *Varieties of Party Identity and Organization* (*V—Party*), (*version 2, February 2022*) dataset (Lindberg et al., 2022);[2] the second is the *Manifesto Project* (MARPOR) (Lehmann et al., 2025) and its associated *Manifesto Corpus*.[3] Together, these two sources provide the information needed to to estimate party proximity and construct voters' pairwise preference orderings across parties.

From V-PARTY we make use of two different indexes to measure ideological distance between parties:

1. Anti-Pluralism Index: it captures the extent to which a party shows a lack of commitment to democratic norms prior to elections; it is an interval-scale index on [0,1], computed as a transformed weighted aggregation of underlying party indicators (e.g., stances toward political opponents, pluralism, minority rights, and rejection of political violence).

2. Populism Index: it captures the extent to which party representatives use populist rhetoric (narrowly defined); it is also on [0,1] and is computed from components such as anti-elitism and people-centrism (via a harmonic-mean aggregation after rescaling).

Similarly, we use RILE (Right–Left) index from MARPOR, intended to capture parties' general left–right programmatic orientation. Conceptually, it is computed as the sum of manifesto emphases on 13 "right" categories minus the sum of emphases on 13 "left" categories.

We employ micro-level data from the *World Political Cleavages and Inequality Database* (*WPID*) (Gethin et al., 2021).This database provides harmonized individual-level electoral survey data for fifty democracies from 1948 to 2020, aggregating over 1.5 million observations across harmonized national election studies.

We compile data on the number of years of continued democracy enjoyed by a country from Boix et al. (2013). GDP per capita (PPP) is obtained from Eurostat et

This collection includes lower-chamber election results for 2181 elections in 183 countries, and 181 elections upper-chamber elections from 24 countries.

[2]This source provides cross-national information on political parties' organizational structures, ideological profiles, and behavioral characteristics. It includes over 600 variables coded at the party-year level, covering a rich array of organizational and ideological characteristics, as well as as well a party ties with society at various levels of operation.

[3]They offer the most extensive collection of digitally annotated electoral programs worldwide, covering over 60 countries and more than 3000 manifestos. MARPOR utilizes the information included in electoral programs to provide party-level policy preferences and ideological orientation of parties, which complement the information in the V—Party dataset.

al. (2025) and extended with data from the Gapminder Foundation (2025).

2.2 Constructing Coordination Failures

2.2.1 Ideological distance matrices (MARPOR and V–Party)

For each election e, jointly identified by country c and year–month t, let $\mathcal{P}_e$ denote the set of parties contesting election e. Using party-level ideology measures from the Manifesto Project (MARPOR) and V–Party, we construct pairwise ideological distances $d_{ij,e}$ for all party pairs $(i, j) \in \mathcal{P}_e^2$. For each election e, these distances form a symmetric distance matrix $D_e = [d_{ij,e}]_{i,j\in\mathcal{P}_e}$ with $d_{ii,e} = 0$.

We construct two sets of distance matrices. The first uses only the MARPOR *RILE* index. The second uses the two V–Party indices: *anti-pluralism* and *populism*.

Z-score normalization. To ensure comparability across indices, we standardize each index using z-scores. For an index $k \in \{\text{rile}, \text{anti}, \text{pop}\}$ and party i in election e, let $X_{i,k,e}$ denote the raw value. The standardized value is

$$Z_{i,k,e} \;=\; \frac{X_{i,k,e} - \mu_{k,e}}{\sigma_{k,e}}, \tag{1}$$

where $\mu_{k,e}$ and $\sigma_{k,e}$ denote the mean and standard deviation of index k in election e.[4]

Pairwise distances. Wedefine ideological distance as Euclidean distance in the standardized index space. Under the MARPOR specification (one-dimensional), the distance between parties i and j in election e is

$$d_{ij,e}^{\text{MARPOR}} \;=\; \left\|Z_{i,\text{rile},e} - Z_{j,\text{rile},e}\right\|_2 \;=\; \sqrt{\left(Z_{i,\text{rile},e} - Z_{j,\text{rile},e}\right)^2}. \tag{2}$$

Under the V–Party specification (two-dimensional), let $\mathbf{Z}_{i,\text{V},e} = (Z_{i,\text{anti},e},\, Z_{i,\text{pop},e})$. Then the distance is

$$d_{ij,e}^{\text{V}} \;=\; \left\|\mathbf{Z}_{i,\text{V},e} - \mathbf{Z}_{j,\text{V},e}\right\|_2 \;=\; \sqrt{\left(Z_{i,\text{anti},e} - Z_{j,\text{anti},e}\right)^2 + \left(Z_{i,\text{pop},e} - Z_{j,\text{pop},e}\right)^2}. \tag{3}$$

[4] If normalization is instead performed over a different reference set (e.g., global sample or within country), replace $\mu_{k,e}$ and $\sigma_{k,e}$ accordingly.

2.2.2 Computing pairwise vote outcomes

Given the pairwise ideological distances $d_{ij,e}$, we simulate the outcomes of counterfactual *pairwise* elections within each election e. For every ordered party pair (p_i, p_j), we compute which of the two parties would win if *only* p_i and p_j contested the election. Collecting these simulated outcomes across all pairs yields a pairwise vote (or majority) matrix for each election. We construct two such matrices: one based on MARPOR distances and one based on V–Party distances.

Reallocating votes in a two-party counterfactual. Let $v_{k,e}$ denote the observed vote share of party p_k in election e, with $\sum_{p_k \in \mathcal{P}_e} v_{k,e} = 1$. Consider the counterfactual contest between parties p_i and p_j. The key object is the simulated vote share that p_i would obtain in this two-party contest, which we denote by $V_{i \succ j,e}$. We assume that voters affiliated with a third party $p_k \notin \{p_i, p_j\}$ would reallocate their votes to whichever of p_i or p_j is ideologically closer to p_k. Formally, define the indicator

$$1_{k \to i|ij,e} = 1\left\{d_{ik,e} < d_{jk,e}\right\}, \tag{4}$$

so that party p_k's vote share is assigned to p_i if p_i is closer to p_k than p_j is. A tie-breaking rule is needed when $d_{ik,e} = d_{jk,e}$; throughout, we split ties evenly.[5]

The simulated two-party vote share for p_i against p_j is then

$$V_{i \succ j,e} = v_{i,e} + \sum_{p_k \in \mathcal{P}_e \setminus \{p_i, p_j\}} v_{k,e} \cdot 1\left\{d_{ik,e} < d_{jk,e}\right\} + \frac{1}{2} \sum_{p_k \in \mathcal{P}_e \setminus \{p_i, p_j\}} v_{k,e} \cdot 1\left\{d_{ik,e} = d_{jk,e}\right\}. \tag{5}$$

Symmetrically,

$$V_{j \succ i,e} = 1 - V_{i \succ j,e}. \tag{6}$$

Party p_i is the simulated winner of the pairwise contest if $V_{i \succ j,e} > \frac{1}{2}$.

Pairwise vote matrix and Condorcet winners. Define the pairwise majority matrix M_e with entries

$$M_{ij,e} = 1\left\{V_{i \succ j,e} > \tfrac{1}{2}\right\} \qquad \text{for } i \neq j, \tag{7}$$

[5] That is, if $d_{ik,e} = d_{jk,e}$, we allocate $\frac{1}{2} v_{k,e}$ to each of p_i and p_j. Alternative deterministic tie-breakers yield very similar results when exact ties are rare.

and $M_{ii,e} = 0$. Constructing M_e using MARPOR distances yields the MARPOR pairwise matrix, and constructing M_e using V–Party distances yields the V–Party pairwise matrix.

A party $p_w \in \mathcal{P}_e$ is a *Condorcet winner* in election e if it defeats every other party in simulated pairwise contests:

$$M_{wj,e} = 1 \quad \forall j \in \mathcal{P}_e,\ j \neq w. \tag{8}$$

Intuitively, the Condorcet winner (when it exists) is the party that would win against any opponent in a head-to-head election.

This procedure corresponds to a deterministic spatial-voting rule in which party vote shares proxy the mass of voters located at each party position, and voters support the closest available party when a preferred party is absent.

Using the computed pairwise preferences, we define two sets of election-events: (i) *weak coordination failures*, which comprise elections where the winner party is not the *Condorcet winner*—the party that would defeat every other party in pairwise majority contests, if such a party exists in the election (Condorcet, 1785; Nurmi, 1987); and (ii) *strong coordination failures*, which comprise elections where the winner party is the *Condorcet loser*—the party that would lose against every other party in all pairwise majority contests, if such a party exists (Arrow et al., eds, 2002). Clearly, the latter is a subset of the former.

2.2.3 Coverage and agreement across ideology sources.

Because our Condorcet classifications are generated from party-distance matrices, a natural concern is sensitivity to the choice of ideology source. We therefore compute coordination failures under two conceptually distinct distance constructions: a one-dimensional programmatic left–right distance from the Manifesto Project (RILE) and a two-dimensional distance based on V–Party's anti-pluralism and populism indices. Table B.1 reports coverage and agreement. V–Party provides broader country coverage (96 countries) than the Manifesto data (50), with 47 countries in common; in the overlapping sample we observe 307 elections and 23,883 constituency-elections. Failure rates in the full samples are similar (weak: 27.8% vs. 26.5%; strong: 10.2% vs. 9.5%). On the common sample, the two classifications agree in 76.3% of constituency-elections for weak failures and 85.3% for strong failures. Importantly, implied failure prevalences in the overlap are nearly identical across

sources (weak: 27.9% in V–Party vs. 28.9% in Manifesto; strong: 9.5% vs. 9.3%), and cross-source disagreements are approximately symmetric under both definitions. Our election sample pools elections that are unique to either MARPOR or V–Party; when an election appears in both sources, we retain the V–Party version, since it provides the larger set of covered elections.

2.3 Methodological Considerations

Constructing pairwise preferences from ideological distances necessarily embeds assumptions about how voters map parties into utility. Our approach follows standard spatial-voting models in assuming that the dominant dimension summarized in MARPOR and V–Party—typically the left–right axis—captures the bulk of programmatic conflict (Laver and Schofield, 1990; Adams et al., 2005). As in this literature, we treat the resulting pairwise comparisons as proxies for majority preferences over feasible alternatives in the observed party set. We emphasize that this approach abstracts from valence, candidate quality, competence, and non-programmatic considerations.

A natural concern is that party entry itself is strategic, and that the presence of a potential Condorcet loser could deter some parties from entering, thereby biasing our measure of coordination failure. Our benchmarks are explicitly defined over the realized party system and post-election vote shares: we characterize whether, given the set of parties that actually contested the election and the votes they obtained, the winner is a Condorcet winner or loser. In this sense, our measures should be interpreted as capturing coordination failures conditional on observed entry decisions. To the extent that potential entrants anticipate being Condorcet losers and therefore stay out, our estimates can be viewed as a lower bound on the prevalence of coordination problems under richer choice sets. Importantly, the role of party-system structure and entry is already reflected in our descriptive and regression evidence on fragmentation, new and renamed parties, and party-system churn, which condition directly on these features rather than ignoring them.

3 Empirical Analysis

We compute the mean rate of weak coordination failure among voters in the countries with multi-party systems averaging data from 1940 to 2020. Figure 1a plots these scores showing that the issue is widespread and affects all continents. Addi-

tionally, Figure C.1 shows the evolution of coordination failure in recent decades. Countries that have experienced coordination failures among their voters tend to be persistent in the evolution of this rate. Figure 1b plots the 10-year time series of the rolling mean of coordination failure and confirms this observation. Since 1960, the mean rate of any form of coordination failure has been stable over time between 20% and 30%, increasing from 1960 to 1980, then declining from 1980 to 2000 to finally plateau from 2000. Time series data involving only weak coordination failure rates and only instances of strong coordination failure show similar patterns.

Overall, we document geographical heterogeneity in the rates of voters' coordination failures and stability over time. In the next sections we will explore the drivers behind these differences by studying supply-side factors such as the parties, demand-side factors such as voters, and institutional features such as years spent in democracy, economic development, and type of electoral systems.

3.1 Institutional and Economic Drivers

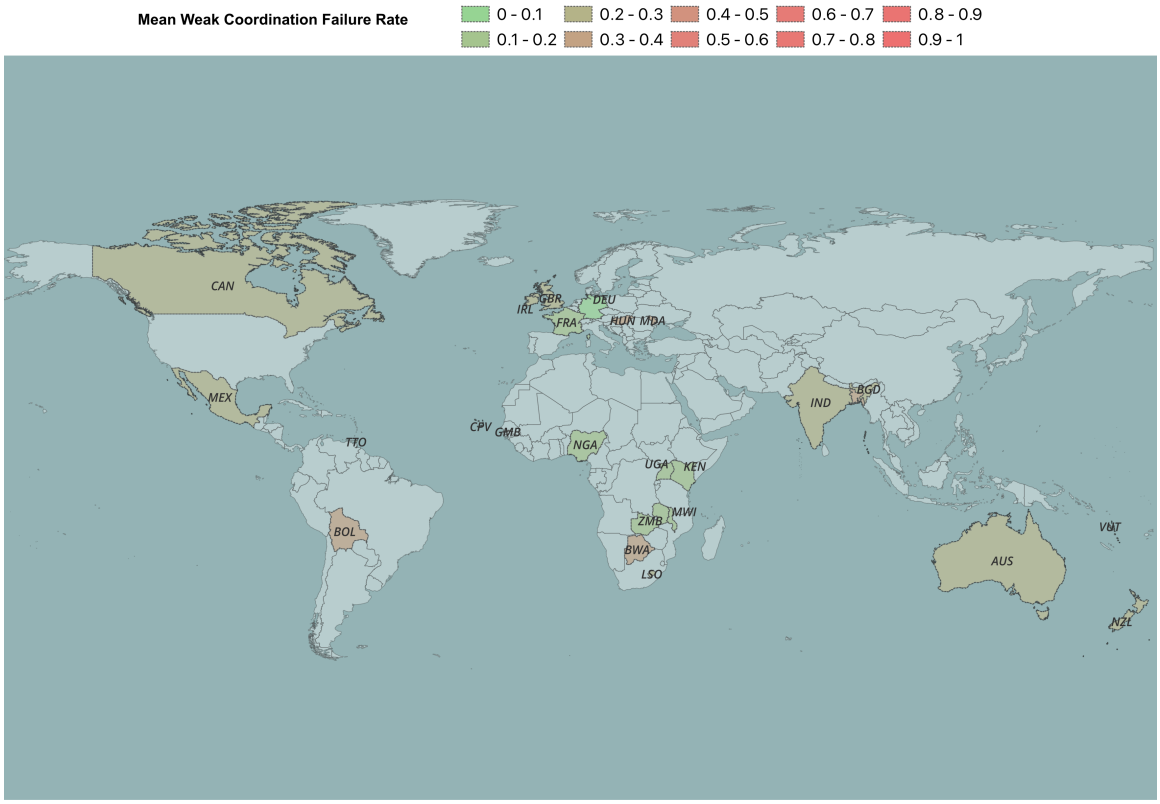
Institutional design and the informational environment shape how easily voters can coordinate on broadly preferred outcomes in multiparty elections. We therefore focus on a small set of drivers that map cleanly to canonical mechanisms in the voting and political economy literatures.

First, electoral rules affect strategic incentives and the set of feasible equilibria: plurality elections are predicted to concentrate competition but also to generate severe "spoiler" incentives when more than two viable candidates persist, whereas runoffs and ranked-choice rules can mitigate vote-splitting by allowing second-stage/transfer mechanisms that reduce the cost of deserting a preferred but non-viable option (Duverger, 1954; Cox, 1997; Myerson and Weber, 1993).

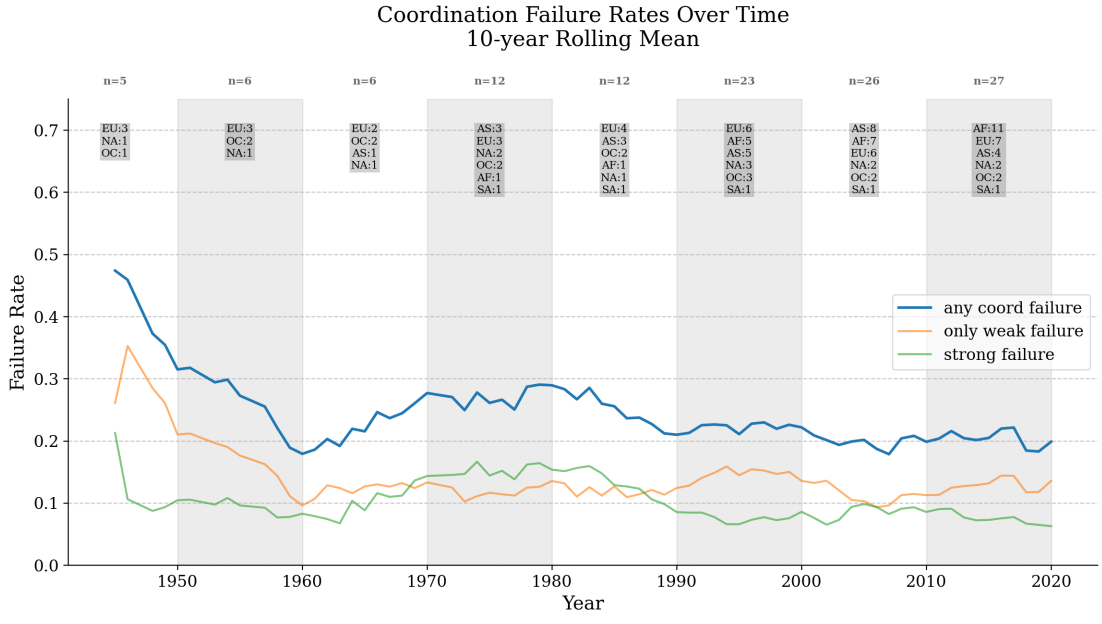
Second, fragmentation mechanically raises the dimensionality of the coordination problem: with more parties, voters face a harder inference task about relative viability and pivotality, making coordination failures more likely (Cox, 1997; Laakso and Taagepera, 1979).

Third, years of democratic experience can proxy for the maturation of parties, voter learning, and accountability institutions; in principle this could reduce failures, but theory and evidence also suggest that information frictions and expressive motives may persist even in mature democracies, motivating an empirical assessment rather than a priori sign restrictions (Besley and Prat, 2006; Pons and Tricaud, 2018b).

Figure 1. Coordination failure over time



(a) Coordination failure rates, full 1940–2020 period.

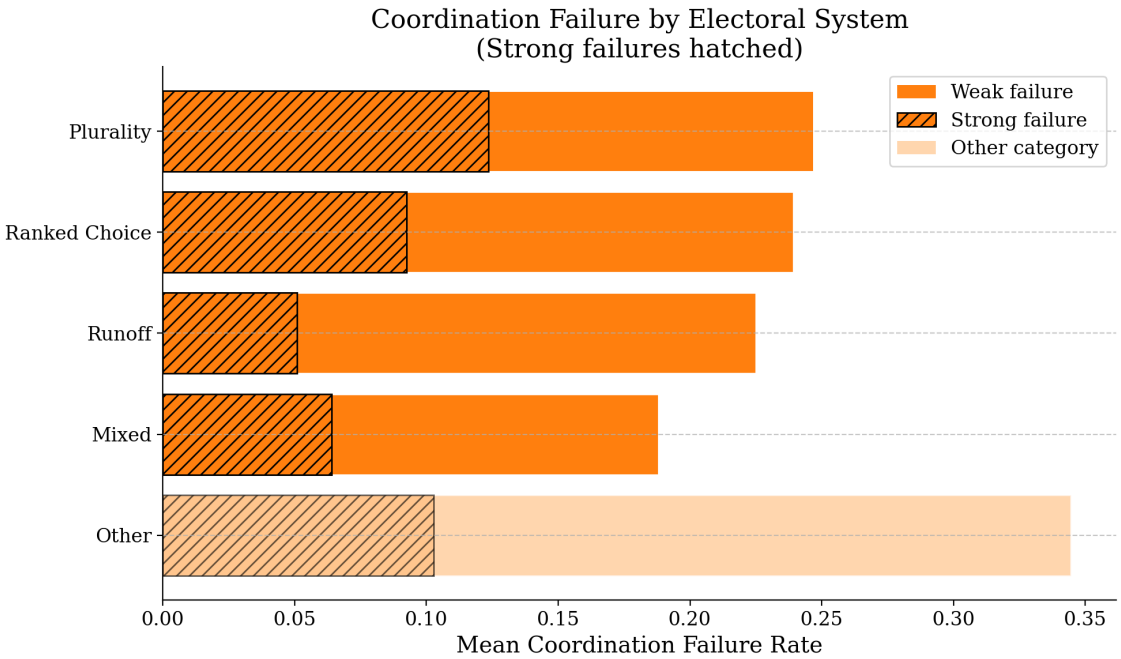


(b) 10-year rolling mean of coordination failure.

Finally, GDP per capita proxies for state capacity and the broader information environment (education, media supply, and political information acquisition), which may lower coordination failures if voters have better access to credible electoral information (Gentzkow et al., 2011).

Electoral System We examine the extent to which institutional factors—specifically, a country's electoral system—shape coordination failure. Figure 2 reports mean coordination-failure levels across four system types: plurality, ranked-choice, mixed, and runoff. Plurality systems exhibit the highest mean failure rate, with more than 25% of elections showing coordination problems. Ranked-choice and mixed systems follow, with mean failure rates between 20% and 25%, while runoff systems display rates just below 20%. The same ordering holds when focusing on strong coordination failure. Pooling all remaining electoral systems used in multiparty elections yields a mean failure rate of roughly 35%. Taken together, this evidence indicates that institutional design plays a meaningful role in shaping the prevalence of coordination failure among voters.

Figure 2. Coordination failure rates by Electoral System (1940-2020)



Years of Democracy and GDP on Failure We next examine how coordination failure correlates with additional institutional features, including years of democratic experience, party-system fragmentation, and economic prosperity. Using constituency and year fixed effects with two-way clustered standard errors (country and year), Table 1 reports estimates showing a robust positive association between fragmentation and coordination failure. Across the OLS specifications (cols. 1–3), the coefficient on the log number of parties is approximately 0.27–0.28 ($p \leq 0.10$). The corresponding logit models (cols. 4–6) yield log-odds coefficients of roughly 2.29–2.32 ($p \leq 0.05$). Together, these results indicate that elections with more competing parties are systematically more susceptible to coordination breakdowns.

By contrast, log GDP per capita (PPP) enters with a negative sign but is statistically indistinguishable from zero in both the OLS (approximately –0.13) and logit models (approximately –1.8 to –1.9), indicating no detectable partial correlation between economic prosperity and coordination failure once fixed effects are included.

Years of democracy shows a small but precisely estimated positive association with coordination failure (OLS = 0.001; logit = 0.006–0.009, significant at conventional levels), suggesting that greater democratic age does not correspond to fewer coordination problems in these data.

However, once we incorporate a broader set of election-specific controls, the associations between coordination failure and both democratic age and economic prosperity lose statistical significance. This pattern indicates that election-specific factors—rather than institutional longevity or income levels—account for the emergence of coordination failures. The next section turns to these election-specific drivers.

Table B.2 shows the effects of GDP per capita and the numbers of years of continued democracy on strong coordination failures only. The patterns are virtually unchanged.

3.2 Supply Side Drivers

To discipline the interpretation of the party-level correlates, we state directional hypotheses about which parties should systematically *benefit* or *lose* when coordination breaks down. These hypotheses map party traits into predicted advantage under an environment where (i) voters face uncertainty about viability and (ii)

Table 1. Effect of GDP per capita and years of continued democracy on coordination failure.

	Weak Coordination Failure											
	No supply-side controls						**With supply-side PCs**					
	OLS			Logit			OLS			Logit		
Years of continued democracy	0.001**		0.001***	0.014***		0.017***	0.002		0.001	−0.001		−0.006
	(0.000)		(0.000)	(0.004)		(0.002)	(0.001)		(0.001)	(0.020)		(0.022)
# Parties (log)	0.264*	0.237	0.257*	2.535*	2.126*	2.314*						
	(0.146)	(0.149)	(0.147)	(1.313)	(1.218)	(1.208)						
GPD per capita (log)		−0.173	−0.171		−2.846*	−2.942*		0.534	0.501		6.532	6.856
		(0.116)	(0.123)		(1.700)	(1.685)		(0.629)	(0.637)		(5.597)	(5.782)
Election characteristics (PCs)			—						Yes			
Num. obs.	35349	30245	30245	17067	13742	13742	17869	17869	17869	6478	6478	6478
Num. groups: cst_n	12543	11572	11572	3364	2684	2684	8140	8140	8140	1612	1612	1612
Num. groups: year	70	65	65	68	63	63	44	44	44	41	41	41
R^2 (full model)	0.493	0.482	0.483				0.538	0.538	0.538			
R^2 (proj model)	0.004	0.004	0.006				0.014	0.014	0.014			
Adj. R^2 (full model)	0.212	0.158	0.159				0.146	0.146	0.146			
Adj. R^2 (proj model)	0.004	0.004	0.006				0.013	0.013	0.013			
Deviance												
Log Likelihood												
Pseudo R^2												

Notes: SEs clustered at country + year level. *** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$. Fixed effects: Constituency (*cst_n*), Year. Columns 1–6 reproduce the baseline without election-characteristic controls; Columns 7–12 add supply-side controls built from principal components of the election-level covariates. The PCs are computed from a pairwise-complete correlation matrix of all available election characteristics; the matrix is projected to the nearest positive semidefinite form when needed. Component scores are constructed for each observation using only its observed variables (no imputation) and then included as controls. We retain the first 10 PCs, which together explain $\sim 85\%$ of the variance in the original election-characteristic set.

mobilization and social-image considerations can shape behavior.

1. **H1 (Organizational-capacity advantage).** Parties with stronger organizational capacity and local brokerage networks should be more likely to *benefit* from coordination failures, because they can better mobilize and consolidate support when ideologically similar competitors split the vote. This follows models and evidence emphasizing brokers, monitoring, and information transmission through local networks in electoral politics (Larreguy et al., 2016; Duarte et al., 2025).

2. **H2 (Expressive / social-image penalties for stigmatized blocs).** Parties associated with socially stigmatized identities or culturally polarizing platforms should be more likely to *lose* from coordination failures, because some voters will be reluctant to coordinate toward them even when doing so is instrumentally beneficial. This is consistent with evidence that expressive motives and social-image concerns affect turnout and vote choice (Pons and Tricaud, 2018b; DellaVigna et al., 2017).

3. **H3 (Coordination devices disproportionately help mainstream viable contenders).** When credible viability signals are available, strategic coordination should intensify toward the locally viable set; absent such signals, fragmentation persists and can advantage smaller but organizationally capable parties

(H1) while harming ideologically adjacent but less viable parties. This prediction is consistent with evidence on rankings/polls as coordination devices and bandwagon dynamics (Granzier et al., 2023).

We evaluate these hypotheses by relating party traits to whether a party is empirically classified as a beneficiary or loser from coordination failure in the election outcomes constructed above.

Who loses from coordination failure. Figure 3b reports conditional OLS estimates with constituency and year fixed effects and standard errors clustered by party and year. Several traits are positively associated with ending up on the losing side of a coordination failure: opposition parties and those labeled as pariah are more likely to lose when voters miscoordinate, as are parties emphasizing culturally liberal positions (e.g., support for LGBT rights or immigration) and parties using demonizing rhetoric toward opponents. By contrast, proxies for party size and legislative strength (vote share and seats in the lower chamber) are strongly negatively correlated with losing, indicating that larger, more established parties are comparatively insulated from the downside risks of miscoordination. Viewed alongside classic coordination theories (Duverger, 1954; Cox, 1997), these patterns suggest that fragmented or stigmatized opposition blocs are particularly vulnerable to coordination breakdowns.

Who benefits from coordination failure. Figure 3a examines parties that benefit from coordination failures. Organizational capacity is positively associated with benefiting: parties with more formalized candidate selection, stronger local embeddedness (affiliations with social organizations, grassroots activity, and local branches), and, in some cases, clientelistic linkages are more likely to gain when voter coordination breaks down. These patterns align with theories emphasizing the electoral advantages of internal organization and mobilization under uncertainty (Panebianco, 1988; Tavits, 2012; Kitschelt and Wilkinson, eds, 2007). We also find a positive association for right-wing economic positioning, whereas programmatic profiles centered on welfare expansion or minority rights correlate negatively with benefiting. Taken together with the results on parties that lose, this evidence suggests that coordination failures tend to reallocate votes toward relatively smaller but organizationally capable parties, rather than systematically advantaging large incumbents.

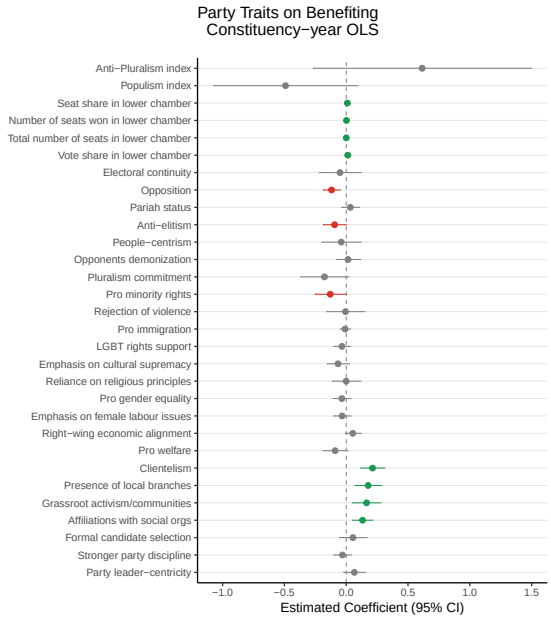
Strong coordination failures. When we restrict attention to strong coordination failures (Figures 3d and 3c), the patterns become more pronounced. On the beneficiary side, leader-centric parties, those with dense local organization, and parties scoring higher on anti-pluralism are more likely to gain. On the losing side, opposition parties and those emphasizing culturally liberal stances (immigration and LGBT rights) are especially likely to be harmed. The positive association between anti-pluralism and benefiting from strong miscoordination is consistent with research identifying anti-pluralism as a core component of populist strategies that perform well under fragmented competition and voter uncertainty (Mudde, 2004; Mueller, 2016; Norris and Inglehart, 2019). These relationships reflect conditional correlations rather than causal effects, but their structure accords with established theoretical expectations regarding how organizational resources, programmatic orientations, and party-system positioning shape exposure to strategic-voting frictions (Cox, 1997; Panebianco, 1988; Tavits, 2012).

3.3 Election Characteristics

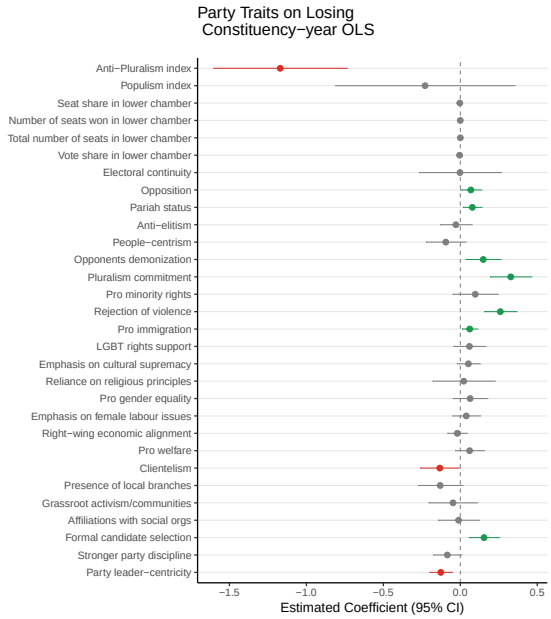
Coordination failure is more likely when voters face a higher-dimensional coordination problem and weaker common knowledge about which alternatives are locally viable. Two features raise these frictions. First, as the choice set expands and support becomes dispersed, voters must infer viability from noisier signals and strategic incentives become harder to internalize (Duverger, 1954; Cox, 1997; Laakso and Taagepera, 1979). Second, when the party system is volatile—with frequent entry, renaming, and exit—historical heuristics and reputational cues are less informative, increasing uncertainty about competitiveness and coalition feasibility (Harmel and Robertson, 1985; Mainwaring and Zoco, 2007; Mair, 1997). Finally, ideological structure affects *focality*: when parties are more dispersed in policy space, coordination becomes harder because ideological neighbors are less obvious substitutes and competition can become more centrifugal (Sartori, 1976; Dalton, 2008; Benoit and Laver, 2006).

Election-level features and coordination failure. Figure 4a (OLS) and Figure 4c (logit) summarize how election-level characteristics correlate with the incidence of voter coordination failure, conditional on constituency and year fixed effects. Across specifications, indicators of party-system fragmentation—such as higher effective numbers of parties (Laakso–Taagepera index) and greater entropy of votes

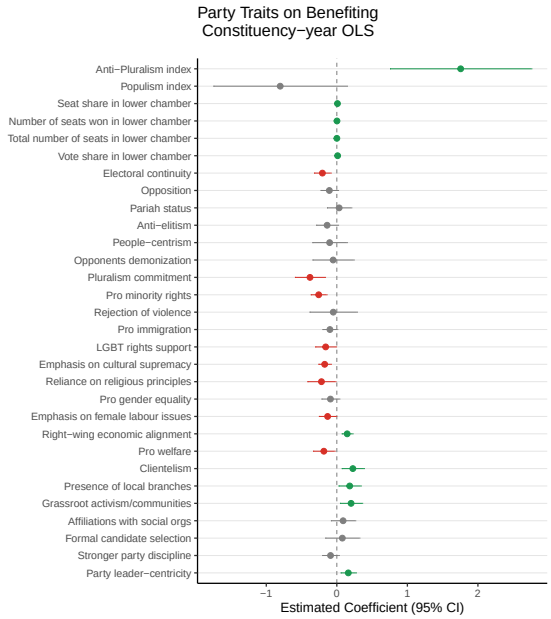
Figure 3. Winners and losers from coordination failure on party characteristics



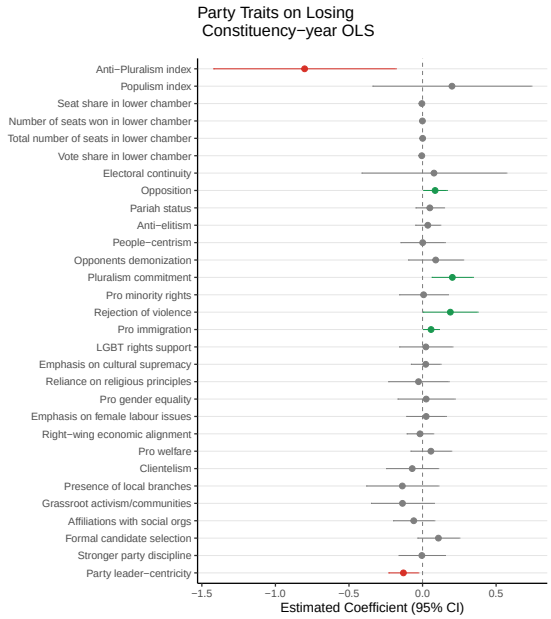
(a) Beneficiary from Coordination Failure on Party Characteristics (OLS).



(b) Loser from Coordination Failure on Party Characteristics (OLS).



(c) Beneficiary from *Strong* Coordination Failure on Party Characteristics (OLS).



(d) Loser from *Strong* Coordination Failure on Party Characteristics (OLS).

or seats—are positively associated with coordination failure, whereas concentration (higher HHI) is negatively associated (Duverger, 1954; Cox, 1997; Laakso and Taagepera, 1979). These patterns accord with classic coordination logic: as the set of viable options expands and support becomes more dispersed, the informational and strategic burdens on voters increase, heightening the likelihood of miscoordination. These patterns are especially relevant because fragmentation is not purely a slow-moving cultural feature of party systems: it can respond to relatively modest institutional or administrative shifts that affect candidate entry and the supply of competitors.[6]

Electoral novelty and churn also matter. Elections with larger shares and vote shares of new or renamed parties are more prone to coordination failures, whereas a greater presence and vote share of continuing parties correlate with fewer failures. This is consistent with research linking new-party entry and success to heightened electoral uncertainty and volatility (Harmel and Robertson, 1985; Mainwaring and Zoco, 2007; Mair, 1997). These patterns also mitigate concerns that our measures might be mechanically biased by strategic entry or exit: to the extent that potential Condorcet losers are discouraged from running, this operates through the observed structure of the party system—fragmentation, churn, and the presence of new or renamed parties—which we model explicitly in this section.

Measures of ideological structure similarly point to greater risks of miscoordination when party systems are more dispersed. Wider dispersion and separation on the left–right dimension—reflected in larger standard deviations and interquartile ranges of party positions, greater centroid distances, and higher maximum outlier scores—are associated with more failures, whereas greater overlap in party platforms correlates with fewer failures. These patterns accord with theories of polarized pluralism, in which centrifugal competition and broader interparty distances make it harder for voters to coordinate on focal alternatives (Sartori, 1976; Dalton, 2008; Benoit and Laver, 2006).

These ideological patterns also speak to the validity of our constructed pairwise preferences. If our approach were driven by mechanical features of the coding scheme or by arbitrary spatial assumptions, we would expect weak or inconsistent relationships between ideological structure and coordination failure. Instead, the strength and direction of the correlations we observe—greater dispersion and

[6]Consistent with this view, evidence from India shows that lowering barriers to entry increases the number of candidates and electoral fragmentation (Kapoor and Magesan, 2018), precisely the upstream conditions under which our framework predicts higher rates of coordination failure.

larger ideological distances predicting more failures—mirror both formal expectations from spatial-voting theory and the patterns that emerge from survey-based preference orderings in WPID. This congruence reinforces that the spatially inferred pairwise comparisons are capturing meaningful variation in relative voter preferences.

Strong coordination failures. Focusing on strong coordination failures (Figures 4b and 4d), the associations generally intensify. Fragmentation measures (effective number of parties and entropy) show stronger positive correlations, while concentration (HHI) exhibits more pronounced negative correlations than under the baseline definition. Similarly, elections marked by greater party-system churn—higher shares and vote shares of new or renamed parties—and wider ideological dispersion display larger estimated associations with strong failures. Substantively, these results suggest that the conditions most conducive to severe miscoordination are those that simultaneously expand the viable choice set, introduce organizationally or programmatically novel competitors, and widen ideological distances among parties—precisely the environments in which strategic voting becomes most cognitively and informationally demanding (Cox, 1997; Sartori, 1976; Laakso and Taagepera, 1979).

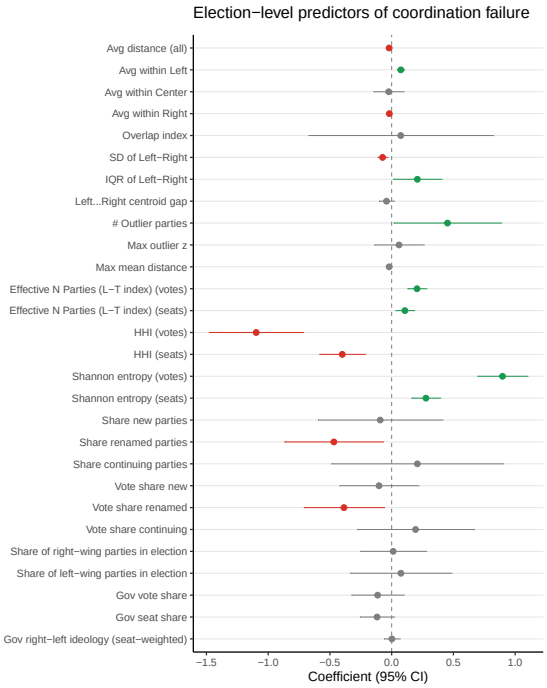
3.4 Link to the experiments.

The cross-national patterns documented in Section 3 indicate that coordination failures are most prevalent precisely when the informational burden on voters is highest: when party systems are fragmented, volatile (high churn and entry), and ideologically dispersed, making it harder to infer which alternatives are locally viable and which coalitions are feasible.

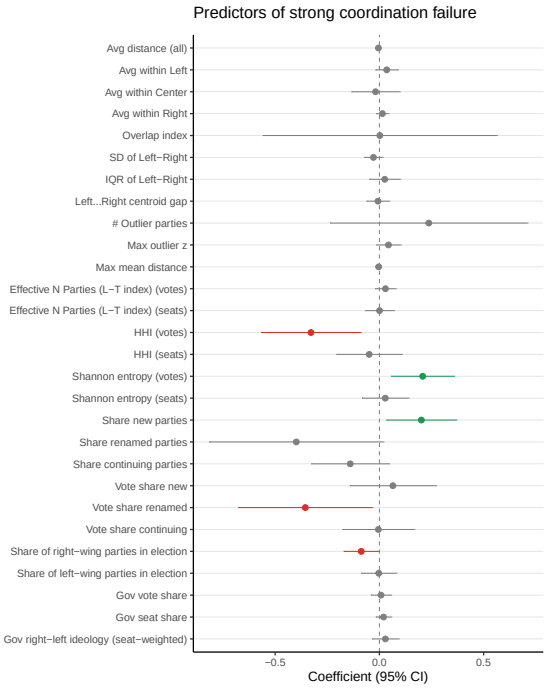
These correlates are consistent with standard theories in which electoral outcomes depend not only on preferences but also on the information voters have about competitiveness and likely pivotality (Feddersen and Pesendorfer, 1996; Granzier et al., 2023). However, observational data alone cannot cleanly separate whether coordination failures arise because voters lack reliable constituency-level viability information, or instead because expressive motives and durable attachments dominate even when viability is understood (Pons and Tricaud, 2018b).

Section 4 therefore provides a complementary, causal test of the information channel: we experimentally deliver credible, easy-to-process polling information

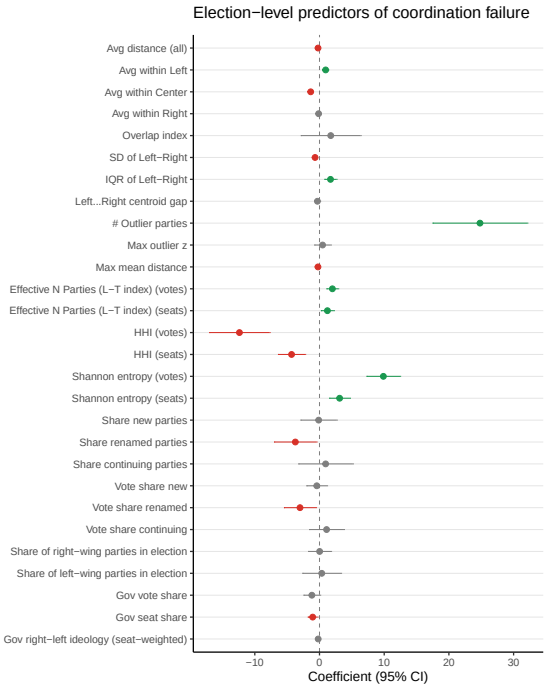
Figure 4. Effects of election characteristics on the probability of coordination failure



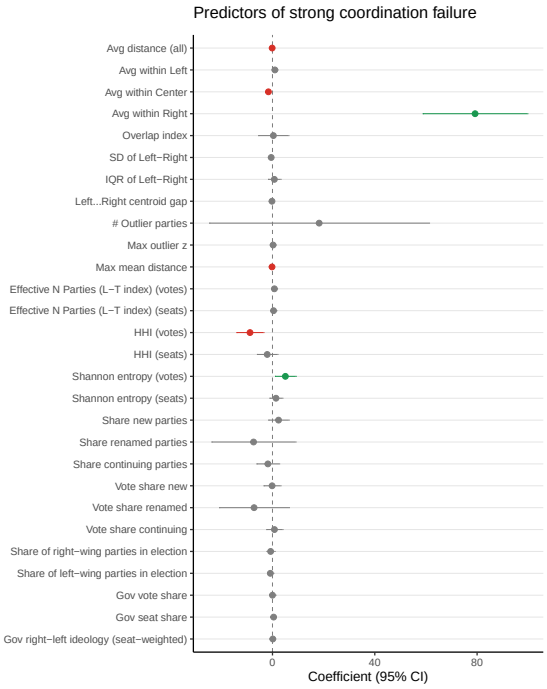
(a) OLS: coordination failure (weak).



(b) OLS: *strong* coordination failure.



(c) Logit: coordination failure (weak).



(d) Logit: *strong* coordination failure.

Notes: Each regression includes $\log(n_parties + 1)$ and constituency, year, and source fixed effects. SEs clustered at country + year level.

about local viability at scale, thereby exogenously relaxing information constraints, and we measure whether (and for whom) coordination improves when the informational environment is shifted.

4 Experimental Evidence

4.1 Intervention

Having established the prevalence of coordination failure and documented its correlates, we turn to testing whether polling information can reduce its incidence by conducting several experimental studies in India around the time of state elections. India is an especially useful setting: it is the world's largest democracy with rising voter polarization; it features a multi-party landscape operating under first-past-the-post (an electoral system prone to coordination failures); its estimated coordination-failure rate of about 30% is comparable to rates in the UK, Canada, and Australia; and local elections often involve electorally relevant third parties and substantial shares of undecided voters.[7] A further reason India is well-suited to isolate the information mechanism is that the broader media environment constrains voters' access to independent political information: India is ranked 151st in the 2025 World Press Freedom Index (Reporters Without Borders , RSF).

State elections select members of the Legislative Assembly (Vidhan Sabha) through single-member districts in which the candidate with the most votes wins, even without a majority, under the administration and oversight of the autonomous Election Commission of India, which manages delimitation, the Model Code of Conduct, and campaign-finance rules. Governments are formed by the party or coalition securing an assembly majority, with the Governor inviting its leader to serve as Chief Minister. Elections occur roughly every five years, though assemblies may dissolve earlier, and they typically feature multi-party competition, strong regional parties, and shifting national-state alliances, producing complex strategic environments that make the possibility of coordination failures substantively meaningful (Palshikar et al., eds, 2017).

The studies consist of four independent experiments conducted in four Indian states around their legislative assembly elections: Bihar (11 November 2025), Delhi (5 February 2025), Uttar Pradesh (14 May 2024), and Telangana (13 May 2024).

[7] Limited strategic defection in India under FPTP has been documented in survey research (Heath and Ziegfeld, 2022).

Together, these states have a combined population of roughly 445 million.

Each experiment comprises two sequential telephone surveys: an initial baseline survey conducted earlier in the campaign, and a second survey administered in the week before the election. Across all experiments, more than 4,000 respondents were recruited via random phone sampling and then randomly assigned to one of two equally sized groups: a treatment group that received additional polling information in the second survey, and a control group that received no polling information. The polling information provided to treated respondents was constructed from self-reported voting intentions collected in the baseline survey. Because no state-level polls are publicly released in India for these elections, treated respondents could not access this information from any source other than our intervention. While the experimental structure was held constant across states, minor adjustments were made to state-specific modules—particularly those assessing general political knowledge and voting intentions—to reflect local political contexts.

First Survey The first survey, conducted earlier in the election cycle, gathered baseline information across six modules: demographics, general political knowledge, political preferences, second-order beliefs, issue importance, and demand for polling information. It collected demographic characteristics such as age, gender, religion, caste, education, income, and occupation. Political knowledge was assessed through questions about the incumbent and previous Chief Ministers and recognition of major state-level parties. Political preferences were measured by asking respondents to rate and rank major parties and report their voting intentions.

The survey also elicited second-order beliefs—respondents' perceptions of voting behavior in their constituency—as well as the frequency of political discussions and respondents' willingness to share contacts of discussion partners. Issue-importance questions gauged how much weight respondents assigned to factors such as caste, party ideology (Hindutva), whether a party has a real chance of winning, perceived community voting behavior, candidate integrity, support for tribals and farmers, and employment prospects. Finally, respondents were explicitly asked about their interest in receiving polling information on voting intentions within their constituency.

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state-level parties. Political preferences were measured by asking respondents to rate and rank major parties and report their voting intentions. The survey also elicited second-order beliefs about constituency voting behavior, the frequency of political discussions, and respondents' willingness to share the contacts of discussion partners. Finally, it gauged the importance respondents assigned to various electoral issues, including caste, party ideology (Hindutva), whether a party has a real chance of winning, perceived community voting behavior, candidate integrity, support for tribals and farmers, and employment prospects, and asked explicitly about their interest in receiving polling information for their constituency.

Second Survey and Treatment The second survey, administered closer to election day, repeated the modules from the first survey except for demographics (aside from name for identification). Respondents in the treatment group received a concise informational intervention summarizing the distribution of voting intentions in their constituency, highlighting the top two parties, their estimated vote shares, and the percentages for minor parties and undecided voters. This information was generated from baseline responses and functioned as an internally constructed poll. Control-group respondents received no such information.

Post-treatment, both groups were asked the same battery of questions on political preferences, second-order beliefs, issue importance, and interest in polling information as in the baseline survey. The second survey therefore enables us to assess the causal effect of receiving polling information on respondents' voting intentions, their beliefs about community preferences, and the weight they assign to different electoral considerations.

Table B.15 shows that randomization worked as intended. Across a broad set of pre-treatment demographics—gender, age, education, caste, and profession—treated and control respondents look virtually identical.[8] The only variable that comes close to conventional significance is the share of Hindu respondents, which is about 2 percentage points higher in the treatment group and marginally significant at the 10% level. In what follows we therefore control for religious composition, but the near-perfect balance on all other observables suggests that randomization generated comparable treatment and control groups.

[8]Point estimates of differences are small (typically below two percentage points) and statistically indistinguishable from zero. The only variable that comes close to conventional significance is the share of Hindu respondents, which is about 2 percentage points higher in the treatment group and marginally significant at the 10% level.

4.2 Results

Effects of polls on voting intentions and ratings Turning to the main behavioral outcomes, we assess the effects of receiving poll information on voting intentions, party rankings, and party ratings. Figure 5 shows no evidence that polls "persuade" respondents by shifting their relative evaluations of parties. Across specifications, the *Treated* $\times$ *Post* coefficients for party-specific voting intentions are very close to zero and statistically insignificant—both in the full sample and when separating respondents whose pre-treatment favorite is a top-two party from those whose preferred party lies outside the top two (columns 1–3).

Likewise, neither parties' ordinal positions in respondents' rankings (columns 4–6) nor their affective ratings (columns 7–9) show systematic treatment effects over time. The interaction terms with pre-treatment favorite parties are small and imprecisely estimated, and the triple interactions (*Treated* $\times$ *Fav top-2 party* (*pre*) $\times$ *Post*) are statistically indistinguishable from zero. Substantively, these estimates allow us to rule out moderate shifts in rankings or ratings for either top-two or minor parties. Together with the turnout and "top-two vote" results in Figure 5, this pattern reinforces a coordination-without-persuasion interpretation: respondents adjust intended votes toward viable options while leaving their underlying party orderings and evaluations essentially unchanged.

The role of motives behind voting Figure 6 shows how respondents weight different considerations when deciding how to vote—such as party ideology, candidate quality, coethnic representation, local development promises, and the desire to support the eventual winner. The treatment and control groups look remarkably similar across all dimensions, with only minor, imprecise differences. Notably, concerns about "wasting" one's vote do not emerge as a dominant or uniquely salient consideration, nor do they become substantially more important after receiving poll information. Table 2 confirms that there is no heterogeneity in the effects among voters who believe that "wasting" one's vote is a dominant consideration relative to those who do not think that.

In other words, respondents behave as if they are strategically avoiding wasted votes—by reallocating intended votes toward viable parties and expecting others to do the same—yet they do not strongly articulate "avoiding a wasted vote" as a primary motivation. This pattern is consistent with an expressive-voting interpretation: poll information facilitates coordination on top-two options without visibly

Figure 5. Treatment effects on voting intentions and preferences

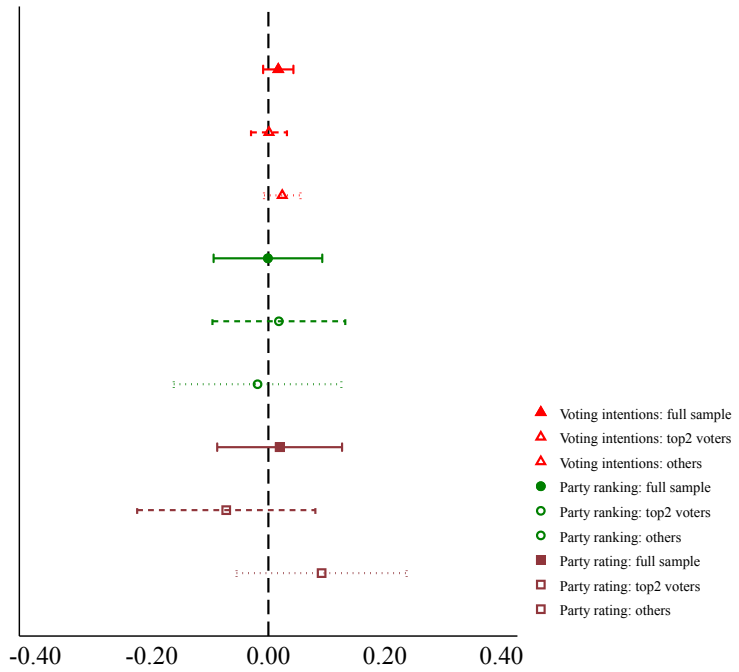
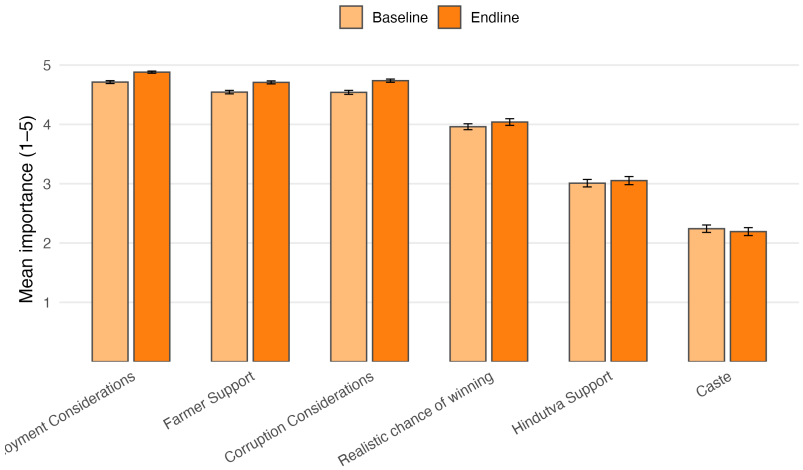


Figure 6. Reasons behind voting decisions (Bihar only)



reshaping stated preferences or the self-reported criteria respondents say they use when deciding whom to support.

Table 2. Treatment Effect: Heterogeneity by Vote-Count Importance (Bihar)

	Voting Intentions			Party Ranking			Party Rating		
	1	2	3	4	5	6	7	8	9
Treated × Post × Top-2 Party (Pre)	−0.045	0.049	−0.063	−0.066	0.151	−0.252	0.327	−0.173	0.615*
	(0.060)	(0.089)	(0.062)	(0.268)	(0.333)	(0.383)	(0.246)	(0.367)	(0.318)
Post × Top-2 Party (Pre) × Vote Count Importance	0.008	0.022	0.017	0.021	0.069	−0.014	0.012	−0.091	0.076
	(0.011)	(0.016)	(0.011)	(0.046)	(0.064)	(0.061)	(0.045)	(0.074)	(0.055)
Treated × Post × Top-2 Party (Pre) × Vote Count Importance	0.014	−0.018	0.020	0.013	−0.025	0.052	−0.065	0.050	−0.135*
	(0.015)	(0.021)	(0.015)	(0.062)	(0.079)	(0.088)	(0.060)	(0.091)	(0.078)
Sample	Full	Top-2 Voters	Others	Full	Top-2 Voters	Others	Full	Top-2 Voters	Others
Dep. Var. Mean	0.111	0.111	0.111	3.080	3.080	3.080	3.344	3.344	3.344
Party × Voter FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Party × Time FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Voter × Time FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Num. obs.	20244	7140	13104	18210	6798	11412	17498	6231	11267
R^2 (full model)	0.712	0.759	0.718	0.784	0.805	0.776	0.783	0.808	0.773
R^2 (proj model)	0.001	0.001	0.003	0.000	0.001	0.000	0.001	0.001	0.001
Adj. R^2 (full model)	0.135	0.274	0.151	0.271	0.369	0.222	0.168	0.263	0.124
Adj. R^2 (proj model)	0.000	−0.001	0.002	−0.000	−0.001	−0.001	−0.000	−0.001	0.000

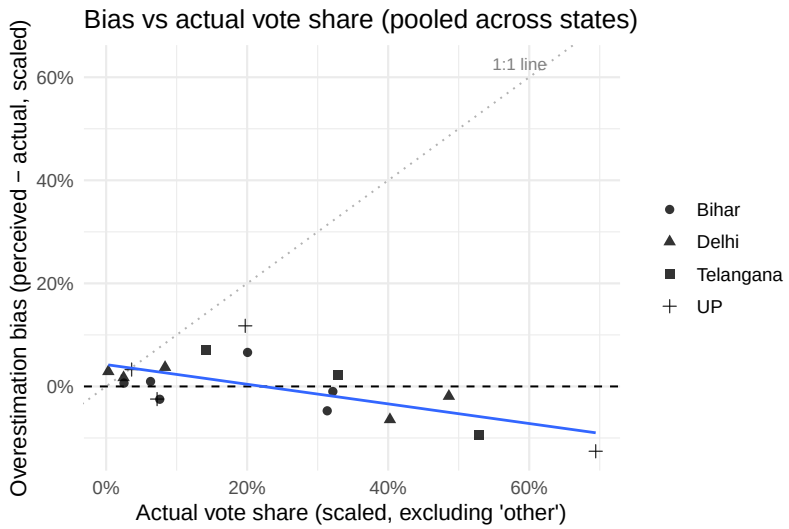
Vote Count IMportance measures, from 1 to 5, the importance respondents give to making their vote count in the baseline survey. $^{***}p < 0.01$; $^{**}p < 0.05$; $^{*}p < 0.1$

Effect of polls on unsure voters The estimates in Table B.21 suggest that the poll meaningfully shifted unsure respondents toward participating, while having only limited influence on which party they ultimately supported. In column (1), the post coefficient of –0.749 indicates a large overall reduction in the probability of reporting non-voting among initially unsure respondents, and the treatment–post interaction of –0.012—though not statistically precise—corresponds to roughly a 1.2-percentage-point additional increase in turnout for those who received the poll. Conditional on voting (column (2)), the treatment–post interaction shows a 0.070 increase, indicating a 7-percentage-point higher probability of choosing a top-two party among treated respondents at endline. Although this effect is only weakly significant, its magnitude suggests a modest directional shift consistent with the informational content of the poll.

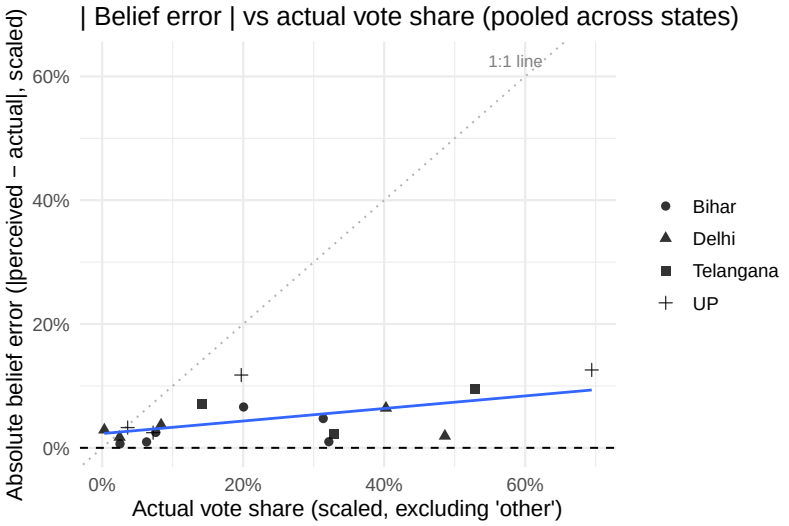
Exploring the role of second order beliefs We also examine whether the limited treatment effects on voting intentions could stem from the intervention failing to correct respondents' beliefs about who is likely to win. If respondents already hold accurate expectations about the leading parties, additional polling information would be unlikely to shift their choices. Table B.17 rule this out. Across all four states, respondents correctly anticipated the *ranking* of the main competitors but were systematically incorrect about the *levels* of support. The same patterns

emerge visually in Figure 7 and Figure 8. These discrepancies show that voters perceived substantially more competition than actually existed as shown in Table B.16. In every state, the distribution of respondents' own voting intentions differs statistically from their reported second-order beliefs at baseline, indicating that prior to treatment voters did not already hold correct or fully aligned expectations about constituency-level support. This result contradicts the findings of Heath and Ziegfeld (2022) where voters in Uttar Pradesh in 2017 election held systematically biased beliefs about the winner of the elections, overestimating the chance that their own party would win the elections.

Figure 7. Pooled comparison between perceived and actual vote shares at baseline

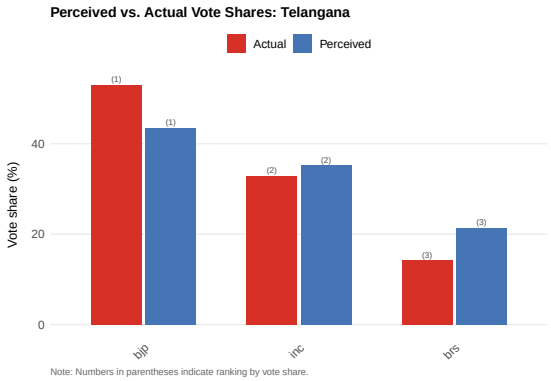


(a) Bias vs. Actual Share (Pooled)

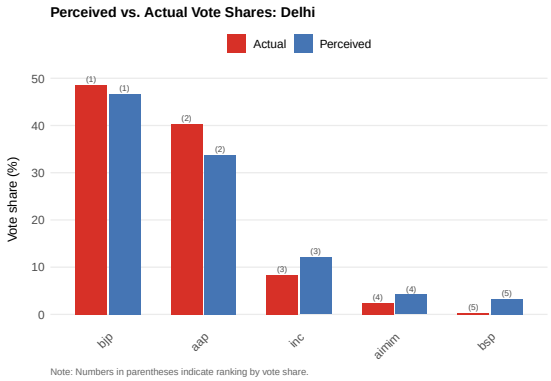


(b) Absolute Error vs. Actual Share (Pooled)

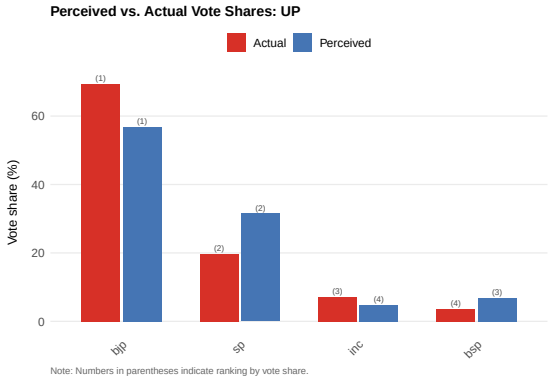
Figure 8. State-level comparison between perceived and actual vote-share distributions at baseline. Ranks are annotated.



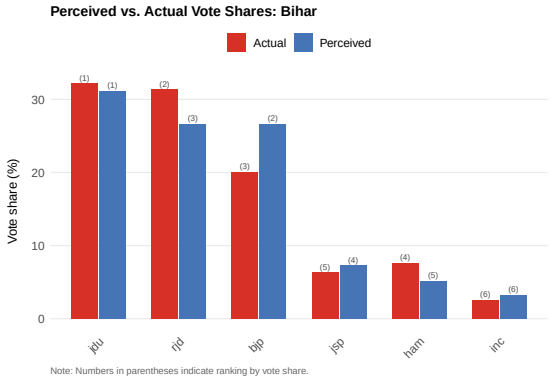
(a) Telangana



(b) Delhi



(c) Uttar Pradesh



(d) Bihar

In Table B.18, the coefficients on the Treated $\times$ Top-2 party $\times$ Post interaction are positive across specifications (0.99, 1.09, and 0.73 percentage points, respectively), although imprecisely estimated and not statistically distinguishable from zero at conventional levels. While we cannot claim a precisely estimated shift in perceived vote shares, the pattern of point estimates is more consistent with modest belief updating in favor of the leading parties than with systematic skepticism that pushes perceptions away from the poll. Importantly, we can rule out large negative effects on perceived top-two strength: the confidence intervals are inconsistent with voters systematically revising their beliefs in the opposite direction of the treatment information.

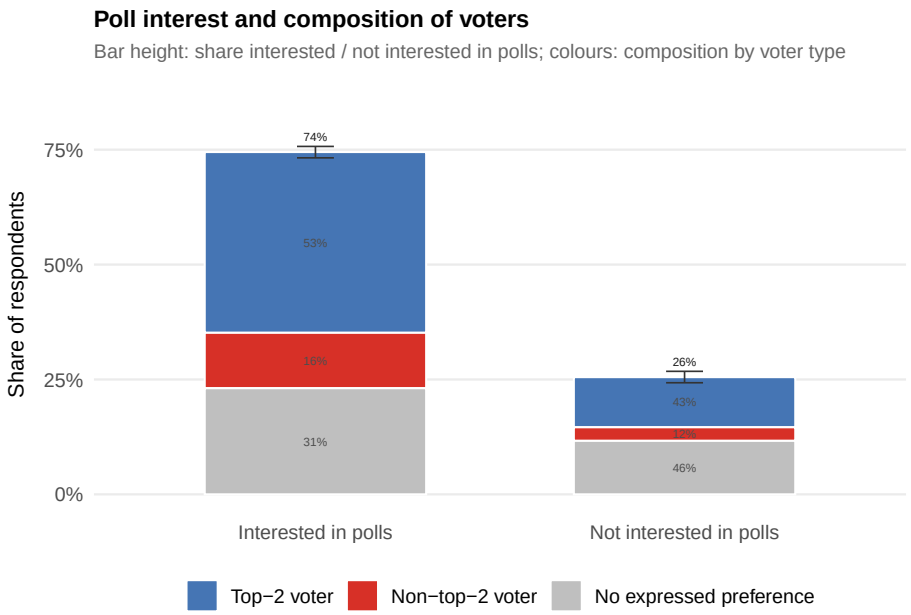
Alternative mechanisms: trust in and informativeness of polls A natural alternative to our preferred expressive-voting interpretation is that the null effects

arise because respondents either did not trust the polls or found them uninformative—especially given that they were constructed from baseline intentions. We cannot directly measure trust in our internally generated polls, and we therefore cannot completely rule out such mechanisms. However, several pieces of evidence from the experiment suggest that distrust or non-informativeness are unlikely to be the primary drivers of the null effects on vote intentions, rankings, and affective ratings.

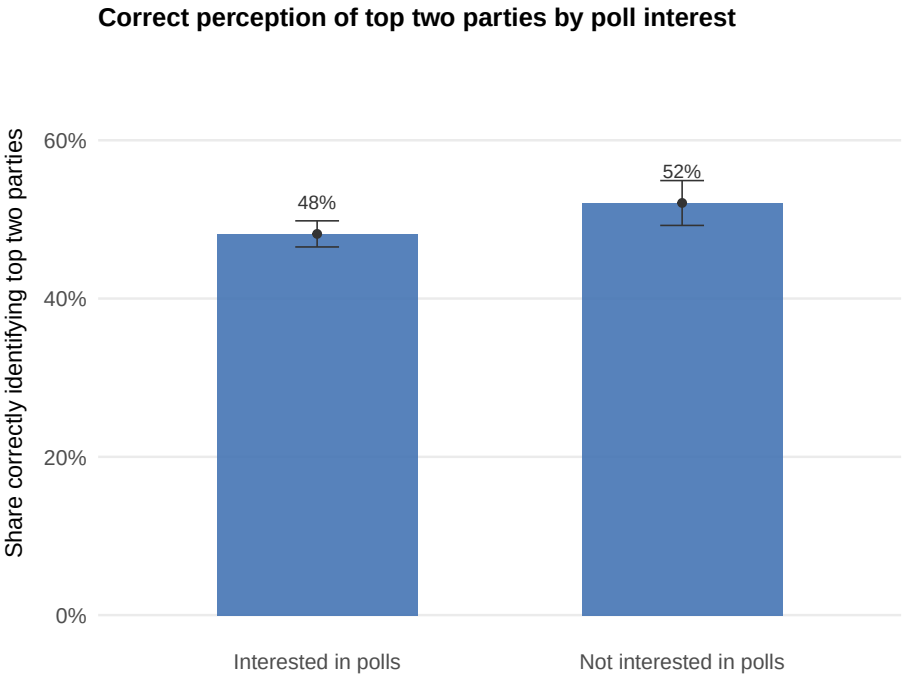
First, there is substantial stated demand for poll information. Figure 9a shows that 75% of respondents report being interested in receiving polling information, and that this interest is present among voters for top-two parties, voters for other parties, and respondents without an expressed preference. This pattern is difficult to reconcile with the view that voters wholesale dismiss poll information as irrelevant or untrustworthy. Moreover, Figure 9b documents that the share of respondents who correctly identify the top two parties in their constituency is similar among those who express interest in polls and those who do not (around half in each group, with a slightly higher accuracy among the interested). Thus, interest in polls is neither confined to a small, highly informed elite nor driven solely by confusion among the least informed; it is widespread across informational types. While none of this proves that respondents fully trust our specific poll, it is hard to square with an interpretation in which most voters simply ignore or discount poll information as such.

Second, the intervention clearly had the potential to be informative. At baseline, respondents systematically misperceived the levels of support for different parties: while they typically identified the correct top two parties, they overestimated the competitiveness of non-top-two options and underestimated the leading parties' margins. This is reflected in our belief tests and the heterogeneity analyses by baseline misperceptions. Respondents who overestimated the vote share of non–top-two parties or misidentified the top two competitors exhibit large and statistically significant changes in their perceived support for these parties between baseline and follow-up (the coefficients on the misperception terms in Tables B.19 and B.20). These shifts demonstrate that beliefs are neither rigid nor already perfectly informed: there is room for new information to move second-order beliefs. Against this backdrop, our internal polls are constructed from a much larger sample of baseline intentions within each constituency than any individual voter could observe. Even though they are based on contemporaneous data rather than an

Figure 9. Poll interest and informational accuracy.



(a) Composition of respondents by interest in poll information.



(b) Correct identification of top-two parties by poll interest.

external polling industry, they summarize information about the distribution of support that is not trivially available to respondents. In that sense, the polls are informationally rich: they could correct systematic overestimation of non–top-two support and sharpen the perceived vote shares of the leading parties, especially for voters who misperceived the levels most strongly.

Taken together, these pieces of evidence are difficult to reconcile with a pure "distrust" or "non-informativeness" explanation of the null behavioral results. Voters express substantial demand for poll information, they are not systematically disengaged from the information we provide, and their beliefs about party support are neither perfectly accurate nor completely unresponsive. At the same time, we find that (i) the poll has, at best, modest effects on second-order beliefs about top-two support; (ii) there is no detectable impact on vote intentions, rankings, or affective ratings, even among those with the largest baseline misperceptions; and (iii) stated decision criteria, including concerns about "wasting" one's vote, remain unchanged.

We do not claim that expressive motives are the only mechanism at work—nor can we fully exclude some role for distrust in an internally generated poll. However, the combination of substantial demand for polling information, evidence of belief updating, and the absence of meaningful behavioral responses is more consistent with a setting in which voters both care about viability and derive utility from expressive support for preferred parties, than with a setting in which they simply ignore or disbelieve poll information.

5 Implications

Putting the results in perspective To assess the economic significance of these null effects, we quantify the maximum plausible effect sizes implied by our confidence intervals. For party-specific voting intentions, the *Treated* $\times$ *Post* coefficients remain close to zero across specifications, and the corresponding 95% confidence intervals rule out changes larger than roughly 1.5 percentage points. This represents less than 4% of a standard deviation—an order of magnitude smaller than the 3–5 p.p. turnout and vote-choice shifts commonly found in field experiments that manipulate perceived electoral closeness (Gerber et al., 2020; Bursztyn et al., 2024). For party rankings (1–5 scale), estimated effects never exceed 0.07 positions, i.e., under 0.06 standard deviations; for affective ratings (also 1–5 scale), the upper

bounds of the confidence intervals are around 0.20 points, or under 0.16 standard deviations. These magnitudes fall far below the 0.25–0.40 standard-deviation preference shifts observed in laboratory settings where viability cues successfully induce strategic defection (Agranov et al., 2018; Kittel et al., 2014). Taken together, these comparisons indicate that our experiment yields a precise null: even sharply targeted, constituency-specific polling information does not generate economically meaningful changes in intended votes, party rankings, or affective ratings.

External Validity A natural question concerns the external validity of our experiments. Our intervention—constituency-level vote-intention polls constructed from baseline data—represents only one type of viability information, and the setting is a single country. We therefore do not claim that our null results imply that information cannot reduce miscoordination in all contexts. Rather, India offers a deliberately challenging environment for coordination: strong partisan attachments, well-entrenched identities, viable third parties, and high-stakes single-member-district elections. These features make strategic defection inherently costly and expressive voting comparatively attractive. In such an environment, if even precise and locally relevant viability signals fail to shift intended votes or party rankings, this provides evidence of important boundary conditions on when information can meaningfully change coordination behavior.

What are the implications of the results about polls? First, it highlights the importance of understanding the context in which polls are deployed. In settings with strong partisan attachments and pre-existing beliefs, low-cost polls alone may be insufficient to shift voter behavior. Second, it suggests that the type of poll matters. Our polls focused on simple vote intentions. More sophisticated polls that elicit pairwise preferences or provide information on candidate characteristics might be more effective. Third, it points to the need for complementary interventions. Polls might be more effective when combined with other efforts to promote strategic voting, such as voter education campaigns or endorsements from influential figures. Finally, it suggests that the focus of policy should be on when and where polls can be effective. Our cross-national analysis suggests that coordination failures are more prevalent in fragmented party systems with weaker institutions. These might be the contexts where polls have the greatest potential to improve voter coordination.

Which strategies might work More generally, our results suggest that "simple" viability signals—top-two vote-intention numbers—may be too blunt to overcome expressive motives in many real elections. Stronger coordination signals may need to be (i) more diagnostic of pairwise majority structure (e.g., pairwise matchups or CW-identification), (ii) repeated over time, or (iii) coupled with credible coordination focal points such as endorsements or voter-education messages that explicitly frame the strategic tradeoff. In this sense, the null result is informative: it identifies a realistic limit case in which information moves beliefs but does not translate into strategic behavior.

6 Conclusions

This paper has shown that voter coordination failures are neither rare aberrations nor artifacts of a handful of unusual elections, but a recurrent feature of multi-party competition across democracies. We documented that between 1940 and 2020 a substantial share of constituencies experienced "wasted" support for ideologically proximate but non-viable parties. These failures are most common where the classic incentives for strategic defection should, in principle, be strongest—plurality and related systems—and decline in runoff settings, consistent with canonical coordination explanations from Duverger (1954) and Cox (1997).

We further showed that fragmentation is a powerful correlate of failure and that the distributional consequences are patterned: opposition, stigmatized, or culturally liberal parties disproportionately lose out, while well-organized or locally embedded actors profit, in line with theories linking organization and mobilization to success under uncertainty (Panebianco, 1988; Tavits, 2012; Kitschelt and Wilkinson, eds, 2007). Election-level features such as party-system churn and ideological dispersion are also strongly associated with higher rates of (especially strong) coordination failure, underscoring that coordination problems are most acute precisely where choice sets are crowded, parties are in flux, and programmatic distances are large.

The findings also speak to broader theoretical questions about strategic coordination. First, distinguishing weak from strong failures highlights that electoral miscoordination is not a single phenomenon but a spectrum: some failures merely prevent a Condorcet winner from taking office, while others elevate a Condorcet loser who is dominated by every feasible alternative. This distinction is theoreti-

cally meaningful because it clarifies the types of informational environments and party-system structures that generate mild versus severe violations of majority preference. By providing the first cross-national incidence and correlates of strong failures, the paper opens a path for future formal work to treat coordination failure not as a binary event but as a graded outcome.

Second, the strong association between organizational capacity and benefiting from coordination failure refines canonical theories centered on party size and viability. Our evidence shows that, holding size constant, parties with stronger local embeddedness, candidate-selection structures, and grassroots networks are substantially more likely to profit from miscoordination—especially in strong failures. This suggests a theoretical mechanism absent in classic Duvergerian frameworks: organizational capacity can substitute for size in generating focality under uncertainty. This is a core theoretical insight: coordination dynamics are shaped not only by voter expectations about viability but also by parties' ability to mobilize, signal credibility, and overcome local informational frictions.

Taken together, these findings indicate that existing models of strategic coordination, which rely heavily on size-based incentives and informational shortcuts, miss an important dimension of real-world elections: the organizational production of coordination. The patterns uncovered here therefore open the door to new theoretical work linking party organization, informational environments, and the severity of coordination failures.

Against this backdrop, our survey experiments in India provide a direct test of a central mechanism in the coordination literature: whether better information about viability can materially reduce coordination failure (McKelvey and Ordeshook, 1985; Forsythe et al., 1993, 1996; Agranov et al., 2018; Kittel et al., 2014). We implemented a constituency-level "polls" constructed from baseline self-reported voting intentions in a large, high-stakes, first-past-the-post setting with multi-party competition and viable third parties. Despite this, we find precisely estimated *null* effects of these polls on the core behavioral margins that would embody successful coordination: party-specific voting intentions, party rankings, and affective ratings remain essentially unchanged. Treatment differences are small and statistically indistinguishable from zero across major and minor parties, allowing us to rule out moderate persuasion or strategic defection effects.

The information does move beliefs, but only modestly. Respondents already expect substantial support for the top two parties in their constituency, and expo-

sure to the poll slightly amplifies this perceived advantage. Yet when asked which considerations matter for their vote choice, treated respondents look nearly identical to controls, and "avoiding a wasted vote" does not emerge as a dominant or uniquely salient criterion. Voters behave as if they recognize which options are viable and that others will coordinate on them, but they largely preserve their stated party orderings and decision heuristics. Put differently, in this setting expressive attachments and stable partisan affinities survive the provision of viability signals: low-cost constituency polls refine second-order beliefs but do not overcome expressive voting or trigger sizable strategic reallocation away from dominated options.

These findings qualify the role of polls as a coordination device and help delineate important boundary conditions for the polls literature. A large experimental and theoretical tradition emphasizes that viability information can foster "coordination without persuasion" (Agranov et al., 2018) and that poll releases can shape participation and timing (Gerber et al., 2020; Bursztyn et al., 2024). Our evidence suggests that even when viability information is sharp, localized, and novel—state assembly races in India typically lack constituency-level polling—it may leave intended votes and preferences effectively unchanged if voters already have clear beliefs about the main contenders or if expressive motives loom large.

Finally, the study highlights two fronts for future work. First, our cross-national measures show that coordination failures are persistent across decades and continents, yet we know little about which combinations of media environments, polling industries, and party organizations can meaningfully change the informational equilibrium we observe. Second, we have examined short-run voter responses in a single, though paradigmatic, democracy. In equilibrium, parties, media, and regulators will respond—by investing in local polling capacity, adjusting campaign strategies, or regulating publication—and those reactions may either attenuate or amplify the modest belief changes we detect.

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Majority Lost: Global Evidence and Field Experiments on Electoral Miscoordination

Francesco Capozza Ruben Durante Siddhart George

A Theoretical Framework

A.1 Environment

Consider a single first-past-the-post constituency with $K \geq 3$ parties, indexed by $\mathcal{C} = \{1, \ldots, K\}$. Parties 1 and 2 are the main contenders (the "top two"), while $k \geq 3$ index minor parties.

There are N voters, indexed by $i = 1, \ldots, N$. Voter i has a type

$$\tau_i = \big(v_i(\cdot), \lambda_i, e_i\big),$$

where

- $v_i(c)$ is the outcome utility if party c wins, with strict ranking $v_i(1) \geq v_i(2) \geq \cdots \geq v_i(K)$ and favorite party

$$t(i) := \arg\max_{c \in \mathcal{C}} v_i(c).$$

- $\lambda_i \in [0, 1]$ is the weight on expressive utility.
- $e_i > 0$ is the expressive payoff from voting for the favorite party.

Each voter chooses an action $a_i \in \mathcal{C}$ (we abstract from turnout for simplicity, consistent with our focus on intended vote choice). Let $w \in \mathcal{C}$ denote the election winner. The utility of i from action a_i is

$$U_i(a_i) \;=\; (1 - \lambda_i)\, \mathbb{E}\big[\, v_i(w) \mid a_i \,\big] \;+\; \lambda_i\, E_i(a_i), \tag{9}$$

where

$$E_i(a_i) \;=\; \begin{cases} e_i & \text{if } a_i = t(i), \\ 0 & \text{otherwise.} \end{cases} \tag{10}$$

The first term in (9) is a standard pivotal-voter expected utility; the second term captures expressive benefits from supporting one's most-preferred party (Brennan and Lomasky, 1993; Copeland and Laband, 2002).

Aggregate vote shares. Given an action profile $a = (a_1, \ldots, a_N)$, let $V_c(a)$ be the number of votes cast for party c and $\theta_c(a) = V_c(a)/N$ the corresponding vote share. The winner is

$$w(a) \in \arg\max_{c \in \mathcal{C}} \theta_c(a),$$

with an arbitrary tie-breaking rule.

A.2 Information and polls

Let $\theta = (\theta_1, \ldots, \theta_K)$ denote the population *intended* vote-share vector if all voters were to vote sincerely for their favorite party (i.e., $a_i = t(i)$). Ex ante, voters hold a common prior F over θ that summarizes long-run information about parties, media coverage, and local political history. We impose:

Assumption 1 (Concentrated priors on the top two)**.** Under F, parties 1 and 2 are almost surely the top-two in vote shares, and the prior mean reflects this:

$$\Pr\big(\theta_1, \theta_2 \text{ are the two largest components of } \theta\big) \approx 1, \qquad \mathbb{E}_F[\theta_1 + \theta_2] \gg \mathbb{E}_F[\theta_k] \;\forall k \geq 3.$$

Assumption 1 matches the experimental evidence that even in the absence of treatment, respondents assign substantially higher expected vote shares to the top two parties in their constituency than to other parties.

Poll signal. A poll draws n respondents i.i.d. from the constituency. Let $x = (x_1, \ldots, x_K)$ be the vector of counts with $\sum_c x_c = n$, and $\hat{\theta}_c = x_c/n$. Conditional on θ, x is multinomial.

To obtain closed forms, suppose the prior F is Dirichlet with parameter vector $\alpha = (\alpha_1, \ldots, \alpha_K)$. Then the posterior after observing x is Dirichlet with parameter

$\alpha + x$, and the posterior mean is

$$\mathbb{E}[\theta_c \mid x] = \frac{\alpha_c + x_c}{\alpha_0 + n}, \qquad \alpha_0 := \sum_{j=1}^{K} \alpha_j. \tag{11}$$

We interpret the *control* group as voters who observe only the prior F and thus form beliefs μ^{prior}, while the *treatment* group observes x and forms posterior beliefs $\mu^{\text{post}} = \mu(\cdot \mid x)$ via (11). In the experiment, x is constructed from baseline intentions, so $\hat{\theta}_c$ is close to the prior mean for each c.

A.3 Strategies and fulfilled-expectations equilibrium

Each voter i knows her own type τ_i and whether she belongs to the treatment or control group, and shares the common prior F (and, if treated, the poll realization x). Let σ_i be a (pure) voting strategy mapping own type and information into an action:

$$\sigma_i : (\tau_i, \text{info}_i) \mapsto a_i \in \mathcal{C},$$

where info_i is either "prior only" (control) or (prior, x) (treated). A strategy profile is $\sigma = (\sigma_1, \ldots, \sigma_N)$.

Given a strategy profile σ and a joint distribution over types and poll realizations, we can derive the induced distribution over action profiles and hence over aggregate vote shares $\theta(a)$ and winners $w(a)$. Following McKelvey and Ordeshook (1985), we require that voters' beliefs about outcome-relevant aggregates coincide with the actual distribution induced by equilibrium strategies.

Definition 1 (Fulfilled-expectations equilibrium with expressive payoffs)**.** A fulfilled-expectations equilibrium (FEE) with expressive payoffs is a pair $(\sigma, \{\mu_i\}_{i=1}^{N})$ where:

1. For each i, μ_i is a belief over θ (conditional on info_i) such that the induced distribution of $\theta(a)$ under σ and the true type distribution coincides with the distribution implied by $\{\mu_i\}$.

2. For each i and each type τ_i, $\sigma_i(\tau_i, \text{info}_i)$ solves

$$\sigma_i(\tau_i, \text{info}_i) \in \arg\max_{a_i \in \mathcal{C}} U_i(a_i \mid \mu_i),$$

where U_i is given by (9) and μ_i enters through $\mathbb{E}[v_i(w) \mid a_i]$.

Intuitively, in a FEE voters' expectations about vote shares and winners are correct given the strategy profile, and each voter best responds given those expectations and her expressive motives.

Belief precision and perceived viability. Before turning to pivotality and expressive incentives, it is useful to document a general implication of the Dirichlet structure of beliefs introduced above. Recall from (11) that posterior expectations over θ are governed by the Dirichlet parameter vector $(\alpha_1, \ldots, \alpha_K)$ and its concentration $\alpha_0 = \sum_{c=1}^{K} \alpha_c$, which measures the overall precision of voter beliefs about local vote shares. We use this to establish how reductions in uncertainty naturally strengthen voters' perceptions of top-two viability.

[Increasing belief precision reinforces top-two viability] Let μ_i denote voter i's posterior over θ with Dirichlet parameters $(\alpha_1, \ldots, \alpha_K)$ and concentration $\alpha_0 = \sum_{c=1}^{K} \alpha_c$. For any $k \geq 3$, define the perceived top-two–minor-party viability gap

$$D_i(k) \;:=\; \mathbb{E}[\theta_1 + \theta_2 \mid \mu_i] \;-\; \mathbb{E}[\theta_k \mid \mu_i].$$

Under Assumption 1:

(i) $D_i(k) > 0$ in expectation, and its posterior variance decreases in α_0 at rate $1/(\alpha_0 + n)$.[1]

(ii) For any $\ell \in \{1, 2\}$ and any $k \geq 3$, the pivotal probability $\pi_i^{\text{piv}}(\ell, k \mid \mu_i)$ is strictly decreasing in $D_i(k)$ under standard Poisson/normal approximations for large first-past-the-post elections.[2]

Consequently, as α_0 increases (i.e., as voter beliefs become more precise), the perceived viability gap $D_i(k)$ becomes more sharply positive, and $\pi_i^{\text{piv}}(\ell, k \mid \mu_i)$ decreases for every $\ell \neq k \geq 3$. Thus an initially "unsure" voter who becomes more certain — irrespective of treatment — becomes strictly less likely to satisfy the strategic-voting condition in (14) for supporting a non-top-two party k against a top-two alternative ℓ.

Proof sketch. Part (i) follows directly from the Dirichlet–multinomial updating rules, which imply that posterior variances over θ shrink at rate $1/(\alpha_0 + n)$. See Bernardo

[1] See Bernardo and Smith (2000) for the Dirichlet posterior variance formulas.

[2] See Bendor and Mookherjee (1987), Myles (1992), and Degan and Merlo (2009), who show that pivot probabilities are monotone in the perceived margin between alternatives.

and Smith (2000). Part (ii) follows from the fact that in large electorates the instrumental value of a vote is proportional to the density of the vote-difference distribution at zero, which is strictly decreasing in the expected margin between alternatives; see Bendor and Mookherjee (1987); Myles (1992); Degan and Merlo (2009). As α_0 increases, the posterior over θ becomes more concentrated, and under Assumption 1 the mean of $D_i(k)$ is positive and becomes increasingly precisely estimated. This widens the perceived top-two–minor-party margin and strictly lowers $\pi_i^{\text{piv}}(\ell, k \mid \mu_i)$. Combining (i) and (ii) establishes the claim. □

A.4 Polls, pivotality, and expressive dominance

Fix a voter i with favorite party $k = t(i)$, and suppose she contemplates defecting to party $\ell \neq k$ (e.g., one of the top two). Under beliefs μ about θ, let $\pi_i^{\text{piv}}(\ell, k \mid \mu)$ denote the probability that voting for ℓ instead of k changes the election winner. Under standard normal or Poisson approximations in large elections, the instrumental gain from defecting can be written as (e.g. Brennan and Lomasky, 1993; Agranov et al., 2018)

$$\Delta_i^{\text{instr}}(k \to \ell \mid \mu) \approx (1 - \lambda_i)\, C\, \pi_i^{\text{piv}}(\ell, k \mid \mu)\, \big(v_i(\ell) - v_i(k)\big), \tag{12}$$

for some constant $C > 0$ determined by the density of the vote-difference distribution at zero.

The expressive loss from defecting is

$$\Delta_i^{\text{expr}}(k \to \ell) = \lambda_i \big(E_i(k) - E_i(\ell)\big) = \lambda_i e_i. \tag{13}$$

Voter i strictly prefers to vote for ℓ rather than k if and only if

$$\Delta_i^{\text{instr}}(k \to \ell \mid \mu) \;>\; \Delta_i^{\text{expr}}(k \to \ell),$$

or, using (12)–(13), if and only if

$$\pi_i^{\text{piv}}(\ell, k \mid \mu) \;\geq\; \bar{\pi}_i(\ell, k) := \frac{\lambda_i e_i}{(1 - \lambda_i)\, C\, (v_i(\ell) - v_i(k))}. \tag{14}$$

The threshold $\bar{\pi}_i(\ell, k)$ captures how close the race must be—and how large the instrumental stakes must be—for i to sacrifice expressive satisfaction and vote strategically.

In large FPTP constituencies with strongly held partisan identities, it is natural to assume that expressive motives dominate small differences in pivotal probabilities.

Assumption 2 (Expressive dominance in large electorates)**.** For almost all voters i and all relevant pairs (k, ℓ), the pre-poll pivotal probability under the prior satisfies

$$\pi_i^{\text{piv}}(\ell, k \mid \mu^{\text{prior}}) \;<\; \bar{\pi}_i(\ell, k).$$

Equivalently,

$$\lambda_i e_i \;>\; (1-\lambda_i)\, C\, \pi_i^{\text{piv}}(\ell, k \mid \mu^{\text{prior}}) \left(v_i(\ell) - v_i(k)\right)$$

for almost all i.

Assumption 2 is consistent with the expressive-voting literature, which emphasizes that in large elections pivotal probabilities are extremely small and expressive utilities can easily dominate instrumental considerations (Brennan and Lomasky, 1993).

Finally, we assume that the poll is only a modest informational refinement of already-informative priors.

Assumption 3 (Small poll-induced change in pivotality)**.** For almost all voters i and all relevant (k, ℓ),

$$\left|\pi_i^{\text{piv}}(\ell, k \mid \mu^{\text{post}}) - \pi_i^{\text{piv}}(\ell, k \mid \mu^{\text{prior}})\right| \leq \varepsilon_i,$$

where $\varepsilon_i > 0$ is small enough that

$$(1-\lambda_i)\, C\, \varepsilon_i \left(v_i(\ell) - v_i(k)\right) \ll \lambda_i e_i$$

for almost all i.

Assumption 3 mirrors the experimental fact that treatment shifts second-order beliefs about top-two parties by only $\approx$ 1–2 p.p., and that respondents already hold relatively accurate priors about which parties are viable.

A.5 Equilibrium comparative statics

We now show that under Assumptions 1–3, fulfilled-expectations equilibria exhibit belief updating without behavioral change for almost all voters.

Define the *pre-poll expressive surplus* from voting sincerely as

$$G_i(\ell, k) := \lambda_i e_i - (1 - \lambda_i)\, C\, \pi_i^{\text{piv}}(\ell, k \mid \mu^{\text{prior}})\, (v_i(\ell) - v_i(k)).$$

By Assumption 2, $G_i(\ell, k) > 0$ for almost all i.

After the poll, the instrumental gain from defecting can increase by at most $(1 - \lambda_i)\, C\, \varepsilon_i\, (v_i(\ell) - v_i(k))$ relative to its pre-poll value. Under Assumption 3, this increase is much smaller than $\lambda_i e_i$ and hence smaller than $G_i(\ell, k)$ for almost all i. Therefore the sign of the net gain from defecting cannot change.

Proposition 1 (Behavioral invariance to polls)**.** *Under Assumptions 1–3, in any fulfilled-expectations equilibrium the arrival of poll information leaves voters' best responses unchanged for almost all types. In particular, the equilibrium distribution of vote intentions, party rankings, and affective ratings is identical in treatment and control.*

Proof sketch. Fix i and (k, ℓ). Before the poll, the net gain from defecting is

$$\Delta_i^{\text{instr}}(k \to \ell \mid \mu^{\text{prior}}) - \lambda_i e_i = -G_i(\ell, k) < 0$$

for almost all i by Assumption 2. After the poll, the instrumental part can increase by at most $(1 - \lambda_i)\, C\, \varepsilon_i\, (v_i(\ell) - v_i(k))$, which is strictly smaller than $G_i(\ell, k)$ by Assumption 3. Thus the net gain remains negative. The same logic applies to any potential deviation, so the identity of each voter's best response is unchanged when moving from μ^{prior} to μ^{post}. Since equilibrium actions coincide at the individual level, the induced aggregate distributions of votes, winners, and thus rankings/ratings are identical in treatment and control. □

Proposition 1 delivers a precise theoretical counterpart to the experimentally estimated *null effects* on party-specific voting intentions, party rankings, and affective ratings.

We now turn to beliefs. Under the Dirichlet–multinomial updating in (11), the change in the posterior mean for party c is

$$\Delta_c(x) := \mathbb{E}[\theta_c \mid x] - \mathbb{E}[\theta_c] = \frac{x_c - \frac{n\alpha_c}{\alpha_0}}{\alpha_0 + n}.$$

When the prior is reasonably well-calibrated, x_c/n is close to α_c/α_0, especially for large parties; thus $\Delta_c(x)$ is small in absolute value and tends to be slightly positive for parties whose realized poll support exceeds the prior mean. Under Assumption 1, this is more likely for the top two.

Proposition 2 (Belief updating for top-two parties)**.** *Suppose F is Dirichlet with parameter α and Assumption 1 holds. Then for any FEE, the expected posterior belief about the top-two parties' vote shares is weakly higher for treated voters than for control voters, and the treatment–control difference is small in magnitude. Formally, for $c \in \{1, 2\}$,*

$$\mathbb{E}\big[\mathbb{E}[\theta_c \mid x] \mid \mathit{Treat}\big] \;\geq\; \mathbb{E}[\theta_c \mid \mathit{Control}]$$

with equality in the case of perfect prior calibration, and

$$\Big|\mathbb{E}\big[\mathbb{E}[\theta_c \mid x] \mid \mathit{Treat}\big] - \mathbb{E}[\theta_c \mid \mathit{Control}]\Big| = O\left(\frac{1}{\alpha_0 + n}\right).$$

For $k \geq 3$, the corresponding differences are smaller in absolute value.

Proof sketch. Under Dirichlet–multinomial updating, the posterior mean is given by (11). Taking expectations over x yields

$$\mathbb{E}\big[\mathbb{E}[\theta_c \mid x]\big] = \frac{\alpha_c + n\,\mathbb{E}[\theta_c]}{\alpha_0 + n}.$$

If the prior is correctly centered, $\mathbb{E}[\theta_c] = \alpha_c/\alpha_0$, so the treated and control expectations coincide exactly. With mild prior misspecification, the difference between treated and control expectations is proportional to $(\mathbb{E}[\theta_c] - \alpha_c/\alpha_0)/(\alpha_0 + n)$, which is small for large $(\alpha_0 + n)$. Under Assumption 1, the top two parties receive higher true and perceived support, so their realized poll counts x_c tend to exceed prior means more systematically than for minor parties, yielding small positive shifts in posterior beliefs about the top two and essentially negligible shifts for others. □

Proposition 2 matches the experimental finding that the triple interaction between treatment, post, and the top-two indicator is positive but economically small in the belief regressions.

B Additional Tables

Table B.1. Overlap and Agreement Between V-Party and Manifesto Coordination Failure Sources

	V-Party	**Manifesto**	**Both**
Panel A: Coverage			
Countries	96	50	47
Elections	490	518	307
Constituency-elections	33,550	41,717	23,883
Panel B: Failure Rates (full sample)			
Weak failure rate (%)	27.8	26.5	—
Strong failure rate (%)	10.2	9.5	—
Panel C: Agreement (overlapping constituency-elections, n=23,883)			
Weak failure agreement (%)	76.3		
Strong failure agreement (%)	85.3		

Panel D: Cross-tabulation of Classifications (Overlapping Observations)

	Weak Failure		**Strong Failure**	
	MP=0	MP=1	MP=0	MP=1
VP=0	14,274	2,945	19,887	1,719
VP=1	2,714	3,950	1,783	494

Notes: V-Party uses anti-pluralism and populism indices (2D Euclidean distance). Manifesto uses RILE index (1D distance). Agreement is calculated on the common 23,883 constituency-elections.

Table B.2. Effects of GDP per capita and years of continued democracy on coordination failure, controlling for election level characteristics

	Strong Coordination Failure											
	No supply-side controls						**With supply-side PCs**					
	OLS			Logit			OLS			Logit		
Years of continued democracy	0.000		0.000	0.000		0.005	0.000		0.000	−0.073		−0.065
	(0.000)		(0.000)	(0.006)		(0.004)	(0.001)		(0.001)	(0.092)		(0.087)
# Parties (log)	−0.059	−0.053	−0.051	−1.538	−2.339	−2.289						
	(0.070)	(0.072)	(0.074)	(1.994)	(1.951)	(1.968)						
GPD per capita (log)		−0.058	−0.058		−3.111*	−3.149*		−0.227	−0.236		−4.100	−3.084
		(0.082)	(0.083)		(1.657)	(1.673)		(0.236)	(0.245)		(7.202)	(7.177)
Election characteristics (PCs)	—						Yes					
Num. obs.	35349	30245	30245	10315	7070	7070	17869	17869	17869	2869	2869	2869
Num. groups: cst_n	12543	11572	11572	1880	1188	1188	8140	8140	8140	626	626	626
Num. groups: year	70	65	65	64	60	60	44	44	44	38	38	38
R^2 (full model)	0.458	0.497	0.497				0.559	0.559	0.559			
R^2 (proj model)	0.000	0.001	0.001				0.005	0.005	0.005			
Adj. R^2 (full model)	0.158	0.182	0.182				0.186	0.186	0.186			
Adj. R^2 (proj model)	0.000	0.000	0.000				0.003	0.004	0.004			
Deviance												
Log Likelihood												
Pseudo R^2												

Notes: SEs clustered at country + year level. *** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$. Fixed effects: Constituency (*cst_n*), Year. Columns 1–6 reproduce the baseline without election-characteristic controls; Columns 7–12 add supply-side controls built from principal components of the election-level covariates. The PCs are computed from a pairwise-complete correlation matrix of all available election characteristics; the matrix is projected to the nearest positive semidefinite form when needed. Component scores are constructed for each observation using only its observed variables (no imputation) and then included as controls. We retain the first 10 PCs, which together explain $\sim 85\%$ of the variance in the original election-characteristic set.

Table B.3. Party-level OLS FE: Party Traits on Benefiting (Fixed Effects: *cst_n*, *year*)

Outcome: Benefiting from Weak Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Anti-Pluralism index	0.614 (0.451)	14810	4457	50	0.373	0.098
Populism index	−0.491 (0.297)	14810	4457	50	0.378	0.106
Seat share in lower chamber	0.009 (0.002)***	16800	5034	69	0.480	0.253
Number of seats won in lower chamber	0.002 (0.001)***	16800	5034	69	0.466	0.233
Total number of seats in lower chamber	0.000 (0.000)***	16800	5034	69	0.379	0.108
Vote share in lower chamber	0.013 (0.003)***	15161	4521	69	0.470	0.239
Electoral continuity	−0.050 (0.086)	14810	4457	50	0.349	0.064
Opposition	−0.118 (0.034)***	14810	4457	50	0.432	0.183
Pariah status	0.033 (0.036)	14797	4457	50	0.356	0.074
Anti-elitism	−0.094 (0.048)*	14810	4457	50	0.387	0.119
People-centrism	−0.040 (0.081)	14810	4457	50	0.352	0.069
Opponents demonization	0.015 (0.049)	14810	4457	50	0.348	0.064
Pluralism commitment	−0.176 (0.099)*	14810	4457	50	0.372	0.098
Pro minority rights	−0.129 (0.063)**	14810	4457	50	0.395	0.130
Rejection of violence	−0.006 (0.078)	14810	4457	50	0.348	0.063
Pro immigration	−0.009 (0.021)	14810	4457	50	0.349	0.064
LGBT rights support	−0.035 (0.035)	14810	4457	50	0.355	0.072
Emphasis on cultural supremacy	−0.066 (0.045)	14810	4457	50	0.377	0.104
Reliance on religious principles	−0.000 (0.059)	14810	4457	50	0.348	0.063
Pro gender equality	−0.035 (0.036)	14810	4457	50	0.351	0.068
Emphasis on female labour issues	−0.033 (0.035)	14810	4457	50	0.355	0.073
Right-wing economic alignment	0.053 (0.033)	14810	4457	50	0.373	0.098
Pro welfare	−0.090 (0.051)*	14810	4457	50	0.375	0.101
Clientelism	0.213 (0.049)***	14810	4457	50	0.439	0.193
Presence of local branches	0.177 (0.055)***	14810	4457	50	0.394	0.129
Grassroot activism/communities	0.165 (0.058)***	14810	4457	50	0.391	0.125
Affiliations with social orgs	0.132 (0.042)***	14810	4457	50	0.399	0.136
Formal candidate selection	0.054 (0.057)	14810	4457	50	0.356	0.074
Stronger party discipline	−0.030 (0.036)	14810	4457	50	0.353	0.070
Party leader-centricity	0.066 (0.045)	14810	4457	50	0.368	0.092

Notes: Each row reports a separate OLS-FE model using the party trait at left as the regressor of interest. All models include fixed effects for $cst_n, year. SEs clustered at the party + year level. Stars denote significance: {}^{***}p < 0.01, {}^{**}p < 0.05, {}^{*}p < 0.1.$

Table B.4. Party-level OLS FE: Party Traits on Losing (Fixed Effects: *cst_n, year*)

Outcome: Losing from Weak Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Anti-Pluralism index	−1.170 (0.221)***	14810	4457	50	0.304	−0.001
Populism index	−0.229 (0.297)	14810	4457	50	0.210	−0.135
Seat share in lower chamber	−0.003 (0.003)	16800	5034	69	0.239	−0.093
Number of seats won in lower chamber	−0.000 (0.001)	16800	5034	69	0.226	−0.111
Total number of seats in lower chamber	0.000 (0.001)	16800	5034	69	0.225	−0.113
Vote share in lower chamber	−0.004 (0.004)	15161	4521	69	0.228	−0.107
Electoral continuity	−0.002 (0.136)	14810	4457	50	0.203	−0.146
Opposition	0.068 (0.034)*	14810	4457	50	0.234	−0.101
Pariah status	0.078 (0.031)**	14797	4457	50	0.252	−0.075
Anti-elitism	−0.029 (0.052)	14810	4457	50	0.207	−0.140
People-centrism	−0.094 (0.066)	14810	4457	50	0.229	−0.109
Opponents demonization	0.149 (0.058)**	14810	4457	50	0.259	−0.064
Pluralism commitment	0.328 (0.068)***	14810	4457	50	0.299	−0.008
Pro minority rights	0.097 (0.075)	14810	4457	50	0.233	−0.103
Rejection of violence	0.260 (0.054)***	14810	4457	50	0.299	−0.008
Pro immigration	0.061 (0.025)**	14810	4457	50	0.237	−0.096
LGBT rights support	0.060 (0.053)	14810	4457	50	0.225	−0.114
Emphasis on cultural supremacy	0.053 (0.038)	14810	4457	50	0.223	−0.117
Reliance on religious principles	0.022 (0.103)	14810	4457	50	0.203	−0.145
Pro gender equality	0.064 (0.057)	14810	4457	50	0.216	−0.127
Emphasis on female labour issues	0.039 (0.046)	14810	4457	50	0.214	−0.130
Right-wing economic alignment	−0.020 (0.032)	14810	4457	50	0.206	−0.141
Pro welfare	0.061 (0.048)	14810	4457	50	0.216	−0.126
Clientelism	−0.133 (0.065)**	14810	4457	50	0.243	−0.088
Presence of local branches	−0.131 (0.074)*	14810	4457	50	0.231	−0.105
Grassroot activism/communities	−0.047 (0.080)	14810	4457	50	0.207	−0.140
Affiliations with social orgs	−0.011 (0.068)	14810	4457	50	0.203	−0.146
Formal candidate selection	0.154 (0.050)***	14810	4457	50	0.276	−0.041
Stronger party discipline	−0.084 (0.046)*	14810	4457	50	0.244	−0.086
Party leader-centricity	−0.127 (0.037)***	14810	4457	50	0.288	−0.023

Notes: Each row reports a separate OLS-FE model using the party trait at left as the regressor of interest. All models include fixed effects for $cst_n, year. SEs clustered at the party + year level. Stars denote significance: ^{***}p < 0.01, ^{**}p < 0.05, ^{*}p < 0.1$.

Table B.5. Party-level OLS FE: Party Traits on Benefiting (Fixed Effects: *cst_n, year*)

Outcome: Benefiting from Strong Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Anti-Pluralism index	1.756 (0.511)***	5924	2251	47	0.568	0.295
Populism index	−0.803 (0.483)	5924	2251	47	0.522	0.219
Seat share in lower chamber	0.009 (0.003)***	6820	2579	63	0.573	0.304
Number of seats won in lower chamber	0.002 (0.001)**	6820	2579	63	0.562	0.286
Total number of seats in lower chamber	0.001 (0.000)**	6820	2579	63	0.487	0.163
Vote share in lower chamber	0.011 (0.005)**	6031	2308	62	0.566	0.285
Electoral continuity	−0.204 (0.060)***	5924	2251	47	0.456	0.112
Opposition	−0.106 (0.063)*	5924	2251	47	0.507	0.194
Pariah status	0.033 (0.088)	5914	2251	47	0.450	0.101
Anti-elitism	−0.138 (0.079)*	5924	2251	47	0.521	0.217
People-centrism	−0.102 (0.125)	5924	2251	47	0.471	0.136
Opponents demonization	−0.052 (0.149)	5924	2251	47	0.450	0.102
Pluralism commitment	−0.380 (0.109)***	5924	2251	47	0.533	0.237
Pro minority rights	−0.257 (0.057)***	5924	2251	47	0.604	0.353
Rejection of violence	−0.050 (0.171)	5924	2251	47	0.448	0.098
Pro immigration	−0.098 (0.053)*	5924	2251	47	0.484	0.157
LGBT rights support	−0.158 (0.075)**	5924	2251	47	0.536	0.242
Emphasis on cultural supremacy	−0.172 (0.045)***	5924	2251	47	0.586	0.323
Reliance on religious principles	−0.218 (0.101)**	5924	2251	47	0.497	0.179
Pro gender equality	−0.090 (0.064)	5924	2251	47	0.462	0.122
Emphasis on female labour issues	−0.131 (0.063)**	5924	2251	47	0.531	0.233
Right-wing economic alignment	0.147 (0.039)***	5924	2251	47	0.598	0.344
Pro welfare	−0.184 (0.078)**	5924	2251	47	0.541	0.251
Clientelism	0.227 (0.080)***	5924	2251	47	0.546	0.259
Presence of local branches	0.182 (0.080)**	5924	2251	47	0.487	0.162
Grassroot activism/communities	0.202 (0.080)**	5924	2251	47	0.500	0.183
Affiliations with social orgs	0.089 (0.088)	5924	2251	47	0.462	0.121
Formal candidate selection	0.078 (0.123)	5924	2251	47	0.456	0.112
Stronger party discipline	−0.089 (0.060)	5924	2251	47	0.475	0.142
Party leader-centricity	0.163 (0.055)***	5924	2251	47	0.519	0.214

Notes: Each row reports a separate OLS-FE model using the party trait at left as the regressor of interest. All models include fixed effects for $cst_n, year. SEs clustered at the party + year level. Stars denote significance: ^{***}p < 0.01, ^{**}p < 0.05, ^{*}p < 0.1$.

Table B.6. Party-level OLS FE: Party Traits on Losing (Fixed Effects: *cst_n, year*)

Outcome: Losing from Strong Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Anti-Pluralism index	−0.802 (0.316)**	5924	2251	47	0.262	−0.205
Populism index	0.200 (0.275)	5924	2251	47	0.237	−0.247
Seat share in lower chamber	−0.004 (0.003)	6820	2579	63	0.293	−0.154
Number of seats won in lower chamber	−0.001 (0.001)	6820	2579	63	0.279	−0.177
Total number of seats in lower chamber	0.001 (0.001)	6820	2579	63	0.267	−0.196
Vote share in lower chamber	−0.005 (0.006)	6031	2308	62	0.260	−0.219
Electoral continuity	0.078 (0.251)	5924	2251	47	0.233	−0.253
Opposition	0.085 (0.041)**	5924	2251	47	0.279	−0.178
Pariah status	0.050 (0.049)	5914	2251	47	0.244	−0.236
Anti-elitism	0.036 (0.043)	5924	2251	47	0.237	−0.246
People-centrism	0.001 (0.077)	5924	2251	47	0.231	−0.256
Opponents demonization	0.089 (0.095)	5924	2251	47	0.247	−0.231
Pluralism commitment	0.203 (0.071)***	5924	2251	47	0.261	−0.207
Pro minority rights	0.007 (0.085)	5924	2251	47	0.231	−0.256
Rejection of violence	0.189 (0.094)*	5924	2251	47	0.263	−0.204
Pro immigration	0.058 (0.027)**	5924	2251	47	0.247	−0.230
LGBT rights support	0.023 (0.092)	5924	2251	47	0.233	−0.252
Emphasis on cultural supremacy	0.022 (0.051)	5924	2251	47	0.234	−0.252
Reliance on religious principles	−0.027 (0.105)	5924	2251	47	0.232	−0.254
Pro gender equality	0.025 (0.099)	5924	2251	47	0.233	−0.254
Emphasis on female labour issues	0.024 (0.069)	5924	2251	47	0.235	−0.250
Right-wing economic alignment	−0.017 (0.046)	5924	2251	47	0.234	−0.252
Pro welfare	0.057 (0.070)	5924	2251	47	0.242	−0.238
Clientelism	−0.070 (0.090)	5924	2251	47	0.243	−0.237
Presence of local branches	−0.137 (0.125)	5924	2251	47	0.259	−0.210
Grassroot activism/communities	−0.136 (0.109)	5924	2251	47	0.261	−0.207
Affiliations with social orgs	−0.060 (0.071)	5924	2251	47	0.240	−0.242
Formal candidate selection	0.108 (0.073)	5924	2251	47	0.255	−0.217
Stronger party discipline	−0.005 (0.080)	5924	2251	47	0.231	−0.256
Party leader-centricity	−0.130 (0.052)**	5924	2251	47	0.288	−0.164

Notes: Each row reports a separate OLS-FE model using the party trait at left as the regressor of interest. All models include fixed effects for $cst_n, year. SEclusteredattheparty + yearlevel. Starsdenotesignificance: {}^{***}p < 0.01, {}^{**}p < 0.05, {}^{*}p < 0.1$.

Table B.7. Party-level WLS FE: Party Traits on Benefiting (Fixed Effects: *cst_n, year*)

Outcome: Benefiting from Weak Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Anti-Pluralism index	0.614 (0.451)	14810	4457	50	0.373	0.098
Populism index	−0.491 (0.297)	14810	4457	50	0.378	0.106
Seat share in lower chamber	0.009 (0.002)***	16800	5034	69	0.480	0.253
Number of seats won in lower chamber	0.002 (0.001)***	16800	5034	69	0.466	0.233
Total number of seats in lower chamber	0.000 (0.000)***	16800	5034	69	0.379	0.108
Vote share in lower chamber	0.013 (0.003)***	15161	4521	69	0.470	0.239
Electoral continuity	−0.050 (0.086)	14810	4457	50	0.349	0.064
Opposition	−0.118 (0.034)***	14810	4457	50	0.432	0.183
Pariah status	0.033 (0.036)	14797	4457	50	0.356	0.074
Anti-elitism	−0.094 (0.048)*	14810	4457	50	0.387	0.119
People-centrism	−0.040 (0.081)	14810	4457	50	0.352	0.069
Opponents demonization	0.015 (0.049)	14810	4457	50	0.348	0.064
Pluralism commitment	−0.176 (0.099)*	14810	4457	50	0.372	0.098
Pro minority rights	−0.129 (0.063)**	14810	4457	50	0.395	0.130
Rejection of violence	−0.006 (0.078)	14810	4457	50	0.348	0.063
Pro immigration	−0.009 (0.021)	14810	4457	50	0.349	0.064
LGBT rights support	−0.035 (0.035)	14810	4457	50	0.355	0.072
Emphasis on cultural supremacy	−0.066 (0.045)	14810	4457	50	0.377	0.104
Reliance on religious principles	−0.000 (0.059)	14810	4457	50	0.348	0.063
Pro gender equality	−0.035 (0.036)	14810	4457	50	0.351	0.068
Emphasis on female labour issues	−0.033 (0.035)	14810	4457	50	0.355	0.073
Right-wing economic alignment	0.053 (0.033)	14810	4457	50	0.373	0.098
Pro welfare	−0.090 (0.051)*	14810	4457	50	0.375	0.101
Clientelism	0.213 (0.049)***	14810	4457	50	0.439	0.193
Presence of local branches	0.177 (0.055)***	14810	4457	50	0.394	0.129
Grassroot activism/communities	0.165 (0.058)***	14810	4457	50	0.391	0.125
Affiliations with social orgs	0.132 (0.042)***	14810	4457	50	0.399	0.136
Formal candidate selection	0.054 (0.057)	14810	4457	50	0.356	0.074
Stronger party discipline	−0.030 (0.036)	14810	4457	50	0.353	0.070
Party leader-centricity	0.066 (0.045)	14810	4457	50	0.368	0.092

Notes: Each row reports a separate WLS-FE model using the party trait at left as the regressor of interest. All models include fixed effects for $cst_n, year. SEclusteredattheparty + yearlevel. Starsdenotesignificance: {}^{***}p < 0.01, {}^{**}p < 0.05, {}^{*}p < 0.1$.

Table B.8. Party-level WLS FE: Party Traits on Losing (Fixed Effects: *cst_n, year*)

Outcome: Losing from Weak Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Anti-Pluralism index	−1.170 (0.221)***	14810	4457	50	0.304	−0.001
Populism index	−0.229 (0.297)	14810	4457	50	0.210	−0.135
Seat share in lower chamber	−0.003 (0.003)	16800	5034	69	0.239	−0.093
Number of seats won in lower chamber	−0.000 (0.001)	16800	5034	69	0.226	−0.111
Total number of seats in lower chamber	0.000 (0.001)	16800	5034	69	0.225	−0.113
Vote share in lower chamber	−0.004 (0.004)	15161	4521	69	0.228	−0.107
Electoral continuity	−0.002 (0.136)	14810	4457	50	0.203	−0.146
Opposition	0.068 (0.034)*	14810	4457	50	0.234	−0.101
Pariah status	0.078 (0.031)**	14797	4457	50	0.252	−0.075
Anti-elitism	−0.029 (0.052)	14810	4457	50	0.207	−0.140
People-centrism	−0.094 (0.066)	14810	4457	50	0.229	−0.109
Opponents demonization	0.149 (0.058)**	14810	4457	50	0.259	−0.064
Pluralism commitment	0.328 (0.068)***	14810	4457	50	0.299	−0.008
Pro minority rights	0.097 (0.075)	14810	4457	50	0.233	−0.103
Rejection of violence	0.260 (0.054)***	14810	4457	50	0.299	−0.008
Pro immigration	0.061 (0.025)**	14810	4457	50	0.237	−0.096
LGBT rights support	0.060 (0.053)	14810	4457	50	0.225	−0.114
Emphasis on cultural supremacy	0.053 (0.038)	14810	4457	50	0.223	−0.117
Reliance on religious principles	0.022 (0.103)	14810	4457	50	0.203	−0.145
Pro gender equality	0.064 (0.057)	14810	4457	50	0.216	−0.127
Emphasis on female labour issues	0.039 (0.046)	14810	4457	50	0.214	−0.130
Right-wing economic alignment	−0.020 (0.032)	14810	4457	50	0.206	−0.141
Pro welfare	0.061 (0.048)	14810	4457	50	0.216	−0.126
Clientelism	−0.133 (0.065)**	14810	4457	50	0.243	−0.088
Presence of local branches	−0.131 (0.074)*	14810	4457	50	0.231	−0.105
Grassroot activism/communities	−0.047 (0.080)	14810	4457	50	0.207	−0.140
Affiliations with social orgs	−0.011 (0.068)	14810	4457	50	0.203	−0.146
Formal candidate selection	0.154 (0.050)***	14810	4457	50	0.276	−0.041
Stronger party discipline	−0.084 (0.046)*	14810	4457	50	0.244	−0.086
Party leader-centricity	−0.127 (0.037)***	14810	4457	50	0.288	−0.023

Notes: Each row reports a separate WLS-FE model using the party trait at left as the regressor of interest. All models include fixed effects for $cst_n, year. SEclusteredattheparty + yearlevel. Starsdenotesignificance: {}^{***}p < 0.01, {}^{**}p < 0.05, {}^{*}p < 0.1$.

Table B.9. Party-level WLS FE: Party Traits on Benefiting (Fixed Effects: *cst_n, year*)

Outcome: Benefiting from Strong Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Anti-Pluralism index	1.777 (0.519)***	5924	2251	47	0.583	0.319
Populism index	−0.821 (0.492)	5924	2251	47	0.537	0.244
Seat share in lower chamber	0.009 (0.003)***	6820	2579	63	0.586	0.324
Number of seats won in lower chamber	0.002 (0.001)**	6820	2579	63	0.576	0.307
Total number of seats in lower chamber	0.001 (0.000)**	6820	2579	63	0.499	0.182
Vote share in lower chamber	0.011 (0.005)**	6031	2308	62	0.577	0.303
Electoral continuity	−0.204 (0.060)***	5924	2251	47	0.467	0.130
Opposition	−0.108 (0.064)*	5924	2251	47	0.520	0.216
Pariah status	0.035 (0.089)	5914	2251	47	0.462	0.120
Anti-elitism	−0.142 (0.081)*	5924	2251	47	0.536	0.243
People-centrism	−0.104 (0.126)	5924	2251	47	0.484	0.156
Opponents demonization	−0.053 (0.152)	5924	2251	47	0.461	0.120
Pluralism commitment	−0.383 (0.110)***	5924	2251	47	0.546	0.259
Pro minority rights	−0.258 (0.058)***	5924	2251	47	0.618	0.375
Rejection of violence	−0.049 (0.174)	5924	2251	47	0.458	0.115
Pro immigration	−0.101 (0.056)*	5924	2251	47	0.497	0.178
LGBT rights support	−0.161 (0.078)**	5924	2251	47	0.550	0.265
Emphasis on cultural supremacy	−0.176 (0.046)***	5924	2251	47	0.602	0.350
Reliance on religious principles	−0.222 (0.104)**	5924	2251	47	0.510	0.200
Pro gender equality	−0.089 (0.066)	5924	2251	47	0.473	0.139
Emphasis on female labour issues	−0.133 (0.065)**	5924	2251	47	0.545	0.256
Right-wing economic alignment	0.149 (0.040)***	5924	2251	47	0.615	0.371
Pro welfare	−0.189 (0.080)**	5924	2251	47	0.557	0.276
Clientelism	0.226 (0.082)***	5924	2251	47	0.558	0.278
Presence of local branches	0.184 (0.083)**	5924	2251	47	0.498	0.181
Grassroot activism/communities	0.206 (0.082)**	5924	2251	47	0.513	0.205
Affiliations with social orgs	0.091 (0.090)	5924	2251	47	0.474	0.140
Formal candidate selection	0.082 (0.125)	5924	2251	47	0.468	0.131
Stronger party discipline	−0.092 (0.061)	5924	2251	47	0.488	0.163
Party leader-centricity	0.166 (0.056)***	5924	2251	47	0.532	0.236

Notes: Each row reports a separate WLS-FE model using the party trait at left as the regressor of interest. All models include fixed effects for $cst_n, year. SEclusteredattheparty + yearlevel. Starsdenotesignificance: {}^{***}p < 0.01, {}^{**}p < 0.05, {}^{*}p < 0.1$.

Table B.10. Party-level WLS FE: Party Traits on Losing (Fixed Effects: *cst_n, year*)

Outcome: Losing from Strong Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Anti-Pluralism index	−0.788 (0.325)**	5924	2251	47	0.282	−0.173
Populism index	0.212 (0.269)	5924	2251	47	0.256	−0.215
Seat share in lower chamber	−0.005 (0.003)	6820	2579	63	0.315	−0.118
Number of seats won in lower chamber	−0.001 (0.001)	6820	2579	63	0.301	−0.141
Total number of seats in lower chamber	0.001 (0.001)	6820	2579	63	0.288	−0.163
Vote share in lower chamber	−0.006 (0.006)	6031	2308	62	0.277	−0.191
Electoral continuity	0.086 (0.265)	5924	2251	47	0.252	−0.222
Opposition	0.088 (0.042)**	5924	2251	47	0.303	−0.139
Pariah status	0.050 (0.050)	5914	2251	47	0.263	−0.205
Anti-elitism	0.035 (0.044)	5924	2251	47	0.256	−0.216
People-centrism	0.008 (0.074)	5924	2251	47	0.250	−0.226
Opponents demonization	0.085 (0.099)	5924	2251	47	0.264	−0.201
Pluralism commitment	0.200 (0.074)***	5924	2251	47	0.281	−0.175
Pro minority rights	0.005 (0.085)	5924	2251	47	0.250	−0.226
Rejection of violence	0.186 (0.096)*	5924	2251	47	0.282	−0.172
Pro immigration	0.056 (0.031)*	5924	2251	47	0.265	−0.200
LGBT rights support	0.021 (0.098)	5924	2251	47	0.251	−0.223
Emphasis on cultural supremacy	0.020 (0.052)	5924	2251	47	0.252	−0.222
Reliance on religious principles	−0.033 (0.108)	5924	2251	47	0.251	−0.223
Pro gender equality	0.018 (0.109)	5924	2251	47	0.250	−0.225
Emphasis on female labour issues	0.019 (0.074)	5924	2251	47	0.252	−0.223
Right-wing economic alignment	−0.014 (0.047)	5924	2251	47	0.251	−0.223
Pro welfare	0.054 (0.075)	5924	2251	47	0.260	−0.210
Clientelism	−0.069 (0.090)	5924	2251	47	0.261	−0.206
Presence of local branches	−0.133 (0.129)	5924	2251	47	0.277	−0.181
Grassroot activism/communities	−0.124 (0.116)	5924	2251	47	0.275	−0.185
Affiliations with social orgs	−0.064 (0.072)	5924	2251	47	0.260	−0.209
Formal candidate selection	0.110 (0.074)	5924	2251	47	0.276	−0.183
Stronger party discipline	−0.006 (0.083)	5924	2251	47	0.250	−0.226
Party leader-centricity	−0.131 (0.054)**	5924	2251	47	0.309	−0.128

Notes: Each row reports a separate WLS-FE model using the party trait at left as the regressor of interest. All models include fixed effects for $cst_n, year. SE clustered at the party + year level. Stars denote significance: {}^{***}p < 0.01, {}^{**}p < 0.05, {}^{*}p < 0.1$.

Table B.11. Election-level OLS FE: Predictors of Coordination Failure (Fixed Effects: *cst_n, year*)

Outcome: Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Avg distance (all)	−0.02 (0.01)**	20282	9136	45	0.525	0.132
Avg within Left	0.07 (0.01)***	7999	3640	38	0.544	0.155
Avg within Center	−0.02 (0.06)	1489	1390	18	0.953	0.129
Avg within Right	−0.02 (0.00)***	6194	3683	32	0.742	0.355
Overlap index	0.07 (0.38)	20282	9136	45	0.524	0.131
SD of Left-Right	−0.07 (0.02)***	20282	9136	45	0.526	0.134
IQR of Left-Right	0.21 (0.10)*	3041	2212	33	0.791	0.200
Left–Right centroid gap	−0.04 (0.03)	11899	4909	43	0.486	0.120
Outlier parties	0.45 (0.22)**	20287	9141	45	0.524	0.131
Max outlier z	0.06 (0.10)	20282	9136	45	0.524	0.131
Max mean distance	−0.02 (0.01)*	20282	9136	45	0.525	0.132
Effective N Parties (L-T index) (votes)	0.21 (0.04)***	18906	7886	45	0.496	0.131
Effective N Parties (L-T index) (seats)	0.11 (0.04)***	20282	9136	45	0.526	0.135
HHI (votes)	−1.10 (0.19)***	18906	7886	45	0.496	0.132
HHI (seats)	−0.40 (0.09)***	20282	9136	45	0.528	0.137
Shannon entropy (votes)	0.90 (0.10)***	18906	7886	45	0.497	0.134
Shannon entropy (seats)	0.28 (0.06)***	20282	9136	45	0.528	0.137
Share new parties	−0.09 (0.26)	20282	9136	45	0.524	0.131
Share renamed parties	−0.47 (0.20)**	20282	9136	45	0.525	0.131
Share continuing parties	0.21 (0.35)	20282	9136	45	0.524	0.131
Vote share new	−0.10 (0.16)	18906	7886	45	0.490	0.121
Vote share renamed	−0.39 (0.17)**	18906	7886	45	0.490	0.122
Vote share continuing	0.19 (0.24)	18906	7886	45	0.490	0.122
Share of right-wing parties in election	0.01 (0.14)	20282	9136	45	0.524	0.131
Share of left-wing parties in election	0.07 (0.21)	20282	9136	45	0.524	0.131
Gov vote share	−0.11 (0.11)	18906	7886	45	0.491	0.123
Gov seat share	−0.12 (0.07)	20282	9136	45	0.526	0.134
Gov right-left ideology (seat-weighted)	0.00 (0.03)	15496	7797	44	0.599	0.187

Notes: Each row reports a separate OLS-FE model using the variable at left as the regressor of interest (plus $\log(1 + \#\text{ parties})$ as a control). All models include fixed effects for *cst_n* and *year*. SEs clustered at the country + year level. Stars denote significance: $^{***}p < 0.01$, $^{**}p < 0.05$, $^{*}p < 0.1$.

Table B.12. Election-level Logit FE: Predictors of Coordination Failure (Fixed Effects: *cst_n, year*)

Outcome: Coordination Failure (=1)							
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	Deviance	Log Likelihood	Pseudo R^2
Avg distance (all)	−0.23 (0.06)***	7906	1853	43	8927.63	−4463.82	0.14
Avg within Left	0.95 (0.21)***	3513	873	32	3936.15	−1968.08	0.17
Avg within Center	−1.36 (0.00)***	59	31	8	33.13	−16.57	0.59
Avg within Right	−0.14 (0.18)	1011	438	27	1019.48	−509.74	0.27
Overlap index	1.74 (2.36)	7906	1853	43	8955.55	−4477.77	0.14
SD of Left-Right	−0.69 (0.16)***	7906	1853	43	8904.74	−4452.37	0.14
IQR of Left-Right	1.70 (0.47)***	638	201	24	685.91	−342.96	0.22
Left–Right centroid gap	−0.32 (0.22)	5349	1195	40	5988.29	−2994.14	0.16
Outlier parties	24.81 (3.73)***	7906	1853	43	8953.61	−4476.81	0.14
Max outlier z	0.48 (0.65)	7906	1853	43	8947.42	−4473.71	0.14
Max mean distance	−0.24 (0.09)**	7906	1853	43	8921.98	−4460.99	0.14
Effective N Parties (L-T index) (votes)	1.99 (0.46)***	7847	1824	43	8728.12	−4364.06	0.15
Effective N Parties (L-T index) (seats)	1.22 (0.51)**	7906	1853	43	8865.40	−4432.70	0.15
HHI (votes)	−12.38 (2.38)***	7847	1824	43	8689.00	−4344.50	0.16
HHI (seats)	−4.32 (1.07)***	7906	1853	43	8825.15	−4412.58	0.15
Shannon entropy (votes)	9.87 (1.32)***	7847	1824	43	8661.13	−4330.57	0.16
Shannon entropy (seats)	3.11 (0.82)***	7906	1853	43	8825.16	−4412.58	0.15
Share new parties	−0.13 (1.43)	7906	1853	43	8956.76	−4478.38	0.14
Share renamed parties	−3.73 (1.67)**	7906	1853	43	8946.67	−4473.33	0.14
Share continuing parties	0.95 (2.15)	7906	1853	43	8953.71	−4476.85	0.14
Vote share new	−0.42 (0.81)	7847	1824	43	8880.49	−4440.24	0.14
Vote share renamed	−3.01 (1.26)**	7847	1824	43	8872.51	−4436.26	0.14
Vote share continuing	1.10 (1.37)	7847	1824	43	8875.50	−4437.75	0.14
Share of right-wing parties in election	0.02 (0.90)	7906	1853	43	8956.83	−4478.41	0.14
Share of left-wing parties in election	0.35 (1.52)	7906	1853	43	8955.40	−4477.70	0.14
Gov vote share	−1.18 (0.66)*	7847	1824	43	8833.34	−4416.67	0.14
Gov seat share	−1.05 (0.38)***	7906	1853	43	8890.65	−4445.33	0.14
Gov right-left ideology (seat-weighted)	−0.20 (0.11)*	5027	1307	43	5703.62	−2851.81	0.15

Notes: Each row reports a separate Logit-FE model using the variable at left as the regressor of interest (plus $\log(1 + \#\text{ parties})$ as a control). All models include fixed effects for *cst_n* and *year*. SEs clustered at the country + year level. Stars denote significance: $^{***}p < 0.01$, $^{**}p < 0.05$, $^{*}p < 0.1$.

Table B.13. Election-level OLS FE: Predictors of Strong Coordination Failure (Fixed Effects: *cst_n, year*)

Outcome: Strong Coordination Failure (=1)						
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	R^2	Adj. R^2
Avg distance (all)	−0.00 (0.01)	20282	9136	45	0.528	0.138
Avg within Left	0.04 (0.03)	7999	3640	38	0.557	0.179
Avg within Center	−0.02 (0.06)	1489	1390	18	0.949	0.054
Avg within Right	0.01 (0.02)	6194	3683	32	0.765	0.412
Overlap index	0.00 (0.29)	20282	9136	45	0.528	0.138
SD of Left-Right	−0.03 (0.02)	20282	9136	45	0.529	0.139
IQR of Left-Right	0.03 (0.04)	3041	2212	33	0.837	0.376
Left–Right centroid gap	−0.01 (0.03)	11899	4909	43	0.457	0.070
Outlier parties	0.24 (0.24)	20287	9141	45	0.528	0.137
Max outlier z	0.04 (0.03)	20282	9136	45	0.528	0.138
Max mean distance	−0.00 (0.01)	20282	9136	45	0.528	0.138
Effective N Parties (L-T index) (votes)	0.03 (0.03)	18906	7886	45	0.484	0.112
Effective N Parties (L-T index) (seats)	0.00 (0.03)	20282	9136	45	0.528	0.138
HHI (votes)	−0.33 (0.12)**	18906	7886	45	0.485	0.113
HHI (seats)	−0.05 (0.08)	20282	9136	45	0.528	0.138
Shannon entropy (votes)	0.21 (0.08)**	18906	7886	45	0.485	0.113
Shannon entropy (seats)	0.03 (0.06)	20282	9136	45	0.528	0.138
Share new parties	0.20 (0.09)**	20282	9136	45	0.529	0.139
Share renamed parties	−0.40 (0.21)*	20282	9136	45	0.529	0.139
Share continuing parties	−0.14 (0.10)	20282	9136	45	0.528	0.138
Vote share new	0.06 (0.11)	18906	7886	45	0.484	0.111
Vote share renamed	−0.36 (0.16)**	18906	7886	45	0.485	0.112
Vote share continuing	−0.01 (0.09)	18906	7886	45	0.484	0.111
Share of right-wing parties in election	−0.09 (0.04)**	20282	9136	45	0.528	0.138
Share of left-wing parties in election	−0.00 (0.04)	20282	9136	45	0.528	0.138
Gov vote share	0.01 (0.02)	18906	7886	45	0.484	0.111
Gov seat share	0.02 (0.02)	20282	9136	45	0.528	0.138
Gov right-left ideology (seat-weighted)	0.03 (0.03)	15496	7797	44	0.577	0.144

Notes: Each row reports a separate OLS-FE model using the variable at left as the regressor of interest (plus $\log(1 + \#\text{ parties})$ as a control). All models include fixed effects for *cst_n* and *year*. SEs clustered at the country + year level. Stars denote significance: $^{***}p < 0.01$, $^{**}p < 0.05$, $^{*}p < 0.1$.

Table B.14. Election-level Logit FE: Predictors of Strong Coordination Failure (Fixed Effects: *cst_n, year*)

Outcome: Strong Coordination Failure (=1)							
Variable	Coef (SE)	N	Groups: cst_n	Groups: year	Deviance	Log Likelihood	Pseudo R^2
Avg distance (all)	−0.13 (0.05)***	3889	795	40	3608.31	−1804.15	0.21
Avg within Left	0.94 (0.51)*	1596	392	28	1469.77	−734.89	0.27
Avg within Center	−1.59 (0.00)***	43	23	8	28.23	−14.12	0.52
Avg within Right	79.21 (10.43)***	279	113	24	288.10	−144.05	0.24
Overlap index	0.34 (3.01)	3889	795	40	3612.08	−1806.04	0.21
SD of Left-Right	−0.51 (0.31)	3889	795	40	3600.18	−1800.09	0.21
IQR of Left-Right	0.73 (1.24)	212	66	21	182.46	−91.23	0.35
Left–Right centroid gap	−0.20 (0.28)	2695	592	35	2568.57	−1284.29	0.22
Outlier parties	18.25 (21.92)	3889	795	40	3609.56	−1804.78	0.21
Max outlier z	0.23 (0.52)	3889	795	40	3611.35	−1805.67	0.21
Max mean distance	−0.17 (0.07)***	3889	795	40	3603.97	−1801.98	0.21
Effective N Parties (L-T index) (votes)	0.75 (0.53)	3801	779	39	3534.65	−1767.32	0.21
Effective N Parties (L-T index) (seats)	0.41 (0.58)	3889	795	40	3607.88	−1803.94	0.21
HHI (votes)	−8.79 (2.69)***	3801	779	39	3502.13	−1751.06	0.22
HHI (seats)	−2.06 (2.05)	3889	795	40	3602.31	−1801.15	0.21
Shannon entropy (votes)	5.04 (2.07)**	3801	779	39	3517.73	−1758.87	0.22
Shannon entropy (seats)	1.37 (1.28)	3889	795	40	3603.28	−1801.64	0.21
Share new parties	2.37 (2.03)	3889	795	40	3605.40	−1802.70	0.21
Share renamed parties	−7.40 (8.38)	3889	795	40	3605.69	−1802.84	0.21
Share continuing parties	−1.80 (2.25)	3889	795	40	3608.70	−1804.35	0.21
Vote share new	−0.15 (1.68)	3801	779	39	3545.32	−1772.66	0.21
Vote share renamed	−7.20 (6.96)	3801	779	39	3538.61	−1769.31	0.21
Vote share continuing	0.77 (1.61)	3801	779	39	3544.29	−1772.15	0.21
Share of right-wing parties in election	−0.72 (0.80)	3889	795	40	3610.06	−1805.03	0.21
Share of left-wing parties in election	−0.85 (0.62)	3889	795	40	3609.22	−1804.61	0.21
Gov vote share	−0.01 (0.62)	3801	779	39	3545.37	−1772.68	0.21
Gov seat share	0.44 (0.35)	3889	795	40	3608.06	−1804.03	0.21
Gov right-left ideology (seat-weighted)	0.12 (0.48)	2745	638	40	2529.96	−1264.98	0.24

Notes: Each row reports a separate Logit-FE model using the variable at left as the regressor of interest (plus $\log(1 + \#\text{ parties})$ as a control). All models include fixed effects for *cst_n* and *year*. SEs clustered at the country + year level. Stars denote significance: $^{***}p < 0.01$, $^{**}p < 0.05$, $^{*}p < 0.1$.

Table B.15. Balance checks

		Control			Treated			Difference	
	Obs	Obs	Mean	s.d.	Obs	Mean	s.d.	T - C	p-value
				Demographics					
Male	4,027	1,821	0.80	0.40	2,206	0.81	0.39	0.012	0.348
Age	4,027	1,821	39.06	12.85	2,206	39.69	12.73	0.627	0.122
Hindu	4,027	1,821	0.82	0.39	2,206	0.84	0.37	0.022*	0.064
High school or lower	4,027	1,821	0.40	0.49	2,206	0.38	0.49	-0.017	0.264
Caste									
General	4,027	1,821	0.25	0.43	2,206	0.24	0.42	-0.010	0.472
SC	4,027	1,821	0.14	0.35	2,206	0.16	0.36	0.013	0.255
ST	4,027	1,821	0.06	0.24	2,206	0.07	0.26	0.011	0.173
OBC	4,027	1,821	0.43	0.50	2,206	0.42	0.49	-0.015	0.351
Profession									
Salaried Employee	4,027	1,821	0.21	0.40	2,206	0.19	0.39	-0.019	0.130
Own Business	4,027	1,821	0.15	0.36	2,206	0.14	0.35	-0.008	0.455
Farming	4,027	1,821	0.19	0.39	2,206	0.21	0.40	0.013	0.298
Farm Labour	4,027	1,821	0.07	0.25	2,206	0.06	0.24	-0.008	0.292

Notes. Significance at the 10% level is represented by *, at the 5% by **, and at the 1% by ***.

Table B.16. Comparison of perceived vs. actual constituency-level vote-share distributions across states.

city	chi2_stat	chi2_p	ks_stat	ks_p	share_correct_top2
Bihar	41.02	0.00	0.33	0.93	0.27
Delhi	309.66	0.00	0.40	0.87	0.74
Telangana	54.22	0.00	0.33	1.00	0.59
UP	131.23	0.00	0.25	1.00	0.67

Panel A. Chi-square and KS statistics for equality between perceived and actual vote-share distributions, and share of respondents correctly identifying top-two parties.

city	spearman_rho	pearson_r	top2_overlap	herf_actual	herf_perceived	delta_herf
Bihar	0.89	0.96	1	0.25	0.25	-0.00
Delhi	1.00	0.99	2	0.41	0.35	-0.06
Telangana	1.00	0.99	2	0.41	0.36	-0.05
UP	0.80	0.95	2	0.53	0.43	-0.10

Panel B. Goodness-of-fit and structural comparisons between perceived and actual vote-share distributions. Rank correlations indicate accurate ordering of parties, while lower perceived concentration shows systematic underestimation of leading-party dominance.

Table B.17. Perceived vs Actual Vote Shares (scaled), Four States

Panel A: Bihar

Party	Perceived share	Actual share	Abs. error	Rel. error	Bias (perc - act)
jdu	31.20	32.20	1.00	3.10	-1.00
rjd	26.60	31.40	4.70	15.10	-4.70
bjp	26.70	20.10	6.60	32.90	6.60
ham	5.10	7.60	2.50	32.70	-2.50
jsp	7.30	6.30	1.00	15.20	1.00
inc	3.20	2.50	0.60	25.60	0.60

Panel B: Delhi

Party	Perceived share	Actual share	Abs. error	Rel. error	Bias (perc - act)
bjp	46.70	48.60	1.90	3.90	-1.90
aap	33.80	40.20	6.40	16.00	-6.40
inc	12.10	8.40	3.70	44.30	3.70
aimim	4.20	2.50	1.70	69.60	1.70
bsp	3.20	0.30	2.90	936.00	2.90

Panel C: Telangana

Party	Perceived share	Actual share	Abs. error	Rel. error	Bias (perc - act)
bjp	43.50	52.90	9.40	17.80	-9.40
inc	35.20	32.90	2.30	7.00	2.30
brs	21.30	14.20	7.10	50.40	7.10

Panel D: Uttar Pradesh

Party	Perceived share	Actual share	Abs. error	Rel. error	Bias (perc - act)
bjp	56.80	69.40	12.60	18.10	-12.60
sp	31.50	19.70	11.80	59.60	11.80
inc	4.80	7.20	2.50	33.90	-2.50
bsp	6.90	3.60	3.30	90.60	3.30

Table B.18. Second order beliefs: Treatment effect on pooled sample

Dep. variable	(1)	(2)	(3)
	Perceived vote share		
Top 2 party × Post	-0.319	-4.202*	1.786
	(1.598)	(2.340)	(2.049)
Treated × Top 2 party × Post	0.987	1.085	0.725
	(0.664)	(0.868)	(0.932)
$\mathbb{E}(y)$	20.894	22.238	19.865
	(22.879)	(24.879)	(21.164)
Sample	Full	Top 2 voters	Other voters
Adjusted-R^2	0.439	0.504	0.385
F statistic	1.118	1.994	0.928
Obs	37,678	16,336	21,342
Party FE	Yes	Yes	Yes
Respondent FE	Yes	Yes	Yes
Respondent FE	Yes	Yes	Yes
Time FE	Yes	Yes	Yes
Respondent × Party FE	Yes	Yes	Yes
Respondent × Time FE	Yes	Yes	Yes
Party × Time FE	Yes	Yes	Yes

Notes. Standard errors clustered at respondent level are reported in parentheses. Significance at the 10% level is represented by *, at the 5% by **, and at the 1% by ***.

Table B.19. Second-order beliefs: Treatment effect by baseline over-estimation of non-top-2 share

Dep. variable	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
	Voting Intentions			Party Ranking			Party Rating		
Top 2 party × Post	-0.026	-0.098**	0.063***	-0.267***	-0.030	-0.570***	0.274***	-0.085	0.617***
	(0.024)	(0.048)	(0.024)	(0.070)	(0.091)	(0.108)	(0.091)	(0.128)	(0.127)
Overestimates non-top-2 share × Top 2 party × Post	-0.020		-0.177***	0.365		0.536	-0.108		-0.170
	(0.014)		(0.017)	(0.531)		(0.531)	(0.309)		(0.328)
Treated × Top 2 party × Post	0.017	-0.000	0.021	0.011	0.029	-0.004	0.012	-0.058	0.067
	(0.013)	(0.015)	(0.015)	(0.045)	(0.054)	(0.070)	(0.052)	(0.072)	(0.072)
Overestimates non-top-2 share × Treated × Top 2 party × Post	-0.017		-0.021	0.128		0.143	-0.180		-0.239
	(0.013)		(0.015)	(0.755)		(0.757)	(0.309)		(0.325)
$\mathbb{E}(y)$	0.145	0.208	0.098	2.821	2.750	2.891	3.277	3.218	3.324
	(0.352)	(0.406)	(0.298)	(1.202)	(1.204)	(1.195)	(1.240)	(1.311)	(1.178)
Sample	Full	Top 2 voters	Other voters	Full	Top 2 voters	Other voters	Full	Top 2 voters	Other voters
Adjusted-R^2	0.154	0.315	0.037	0.309	0.389	0.242	0.248	0.348	0.158
F statistic	.	2.153	.	4.151	0.157	8.131	5.636	0.795	9.582
Obs	38,946	16,346	22,600	30,500	15,218	15,282	27,606	12,258	15,348
Respondent × Party FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Respondent × Time FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Party × Time FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Notes. 'Overestimates non-top-2 share' is a dummy variable indicating whether respondents over-estimate the share of votes going to non top 2 voters. Standard errors clustered at respondent level are reported in parentheses. Significance at the 10% level is represented by *, at the 5% by **, and at the 1% by ***.

Table B.20. Second-order beliefs: Treatment effect by baseline over-estimation of non-top-2 share

Dep. variable	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
	Voting Intentions			Party Ranking			Party Rating		
Top 2 party × Post	-0.059*	-0.102**	0.020	-0.035	0.071	-0.249*	0.074	-0.205	0.433***
	(0.033)	(0.049)	(0.040)	(0.079)	(0.099)	(0.134)	(0.099)	(0.135)	(0.146)
Perceived top-two parties incorrectly × Top 2 party × Post	0.085***	0.009	-0.015	-0.423***	-0.268***	-0.454***	0.382***	0.342***	0.276**
	(0.019)	(0.023)	(0.024)	(0.067)	(0.083)	(0.114)	(0.078)	(0.117)	(0.111)
Treated × Top 2 party × Post	0.022	0.000	0.019	0.047	0.050	0.069	-0.003	-0.057	0.045
	(0.017)	(0.018)	(0.024)	(0.063)	(0.071)	(0.125)	(0.072)	(0.091)	(0.117)
Perceived top-two parties incorrectly × Treated × Top 2 party × Post	-0.009	-0.002	-0.000	-0.084	-0.059	-0.129	0.032	-0.019	0.043
	(0.025)	(0.030)	(0.031)	(0.087)	(0.107)	(0.149)	(0.102)	(0.148)	(0.147)
$\mathbb{E}(y)$	0.148	0.208	0.102	2.821	2.750	2.891	3.277	3.218	3.324
	(0.355)	(0.406)	(0.302)	(1.202)	(1.204)	(1.195)	(1.240)	(1.311)	(1.178)
Sample	Full	Top 2 voters	Other voters	Full	Top 2 voters	Other voters	Full	Top 2 voters	Other voters
Adjusted-R^2	0.150	0.315	0.030	0.316	0.392	0.249	0.253	0.350	0.160
F statistic	9.549	1.137	0.681	29.552	7.370	19.085	16.850	5.228	11.404
Obs	37,758	16,346	21,412	30,500	15,218	15,282	27,606	12,258	15,348
Respondent × Party FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Respondent × Time FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Party × Time FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

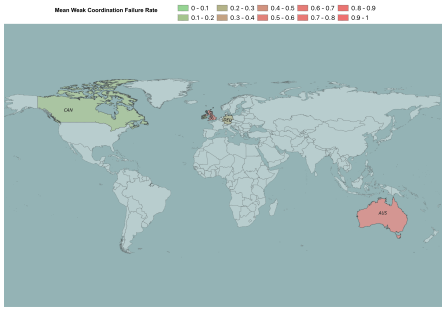
Notes. 'Perceived top-two parties incorrectly' is a dummy variable indicating whether respondents do not correctly guess the top 2 parties in their constituency, by voting intentions of other respondents. Standard errors clustered at respondent level are reported in parentheses. Significance at the 10% level is represented by *, at the 5% by **, and at the 1% by ***.

Table B.21. Baseline-uncertain voters: treatment effects at endline

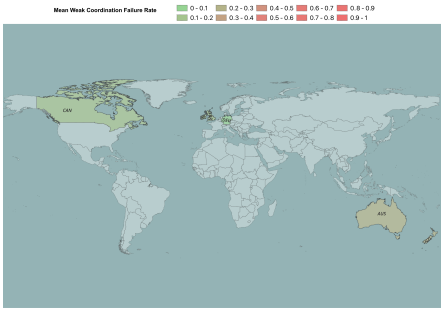
Dep. variable	(1) No Vote (uncertain)	(2) Votes for top-two party
Treated	-0.000	0.000
	(0.000)	(.)
Post	-0.749***	0.518***
	(0.024)	(0.031)
Treated × Post	-0.012	0.070*
	(0.032)	(0.042)
$\mathbb{E}(y)$	0.623	0.278
	(0.485)	(0.448)
Sample	Baseline-uncertain	Baseline-uncertain & voted in endline
Adjusted-R^2	0.606	0.386
F statistic	751.020	.
Obs	1,470	1,108

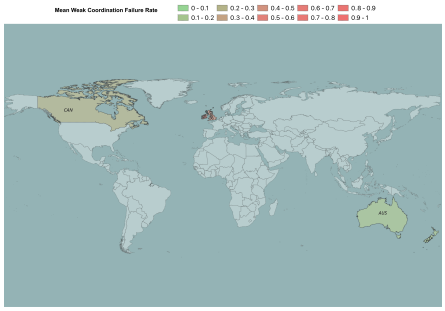
Notes. The sample is restricted to respondents who reported being uncertain at baseline. *No Vote* (*uncertain*) indicates whether the respondent did not cast a vote for any party due to being uncertain, prefering not to answer the question, and other non-discolsed reasons. *Votes for top-two party* indicates whether the voter casted a vote for a top-2 party. Standard errors clustered at respondent level are reported in parentheses. Significance at the 10% level is represented by *, at the 5% by **, and at the 1% by ***.

C Additional Figures

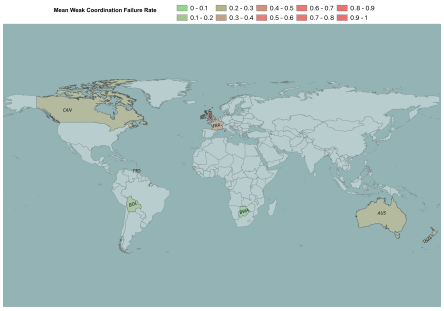


(a) 1940s

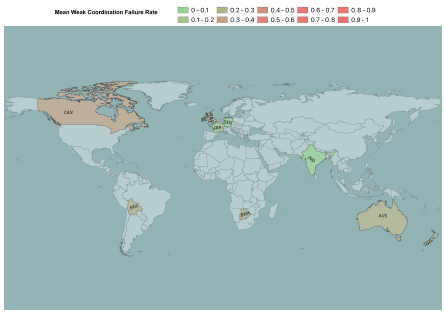




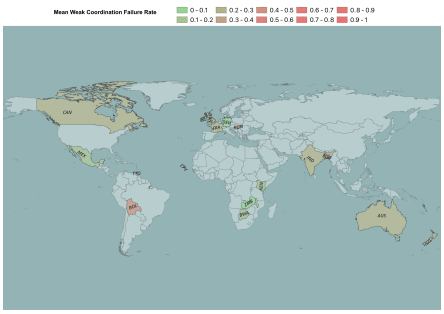
(b) 1960s



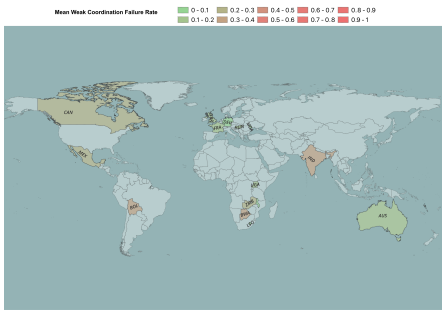
(c) 1970s



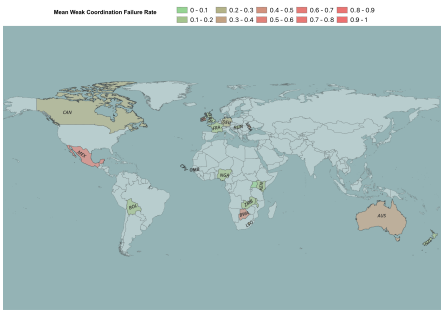
(d) 1980s



(e) 1990s

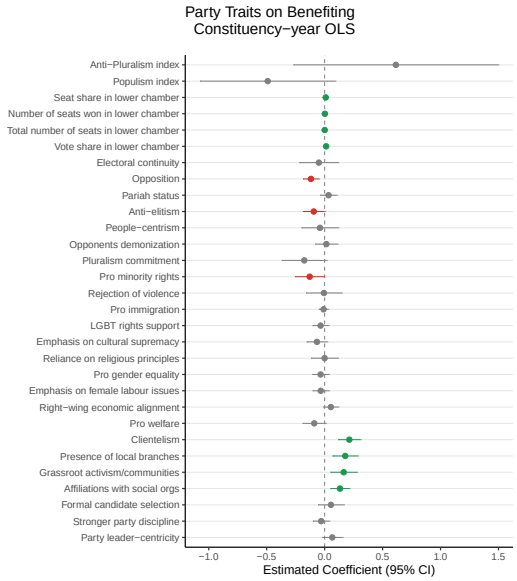


(f) 2000s

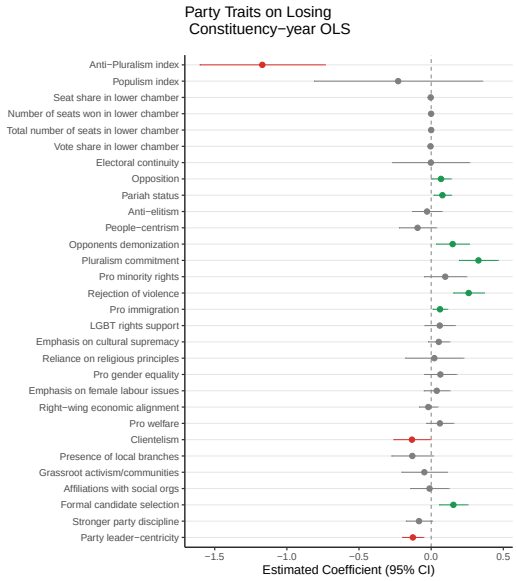


(g) 2010s

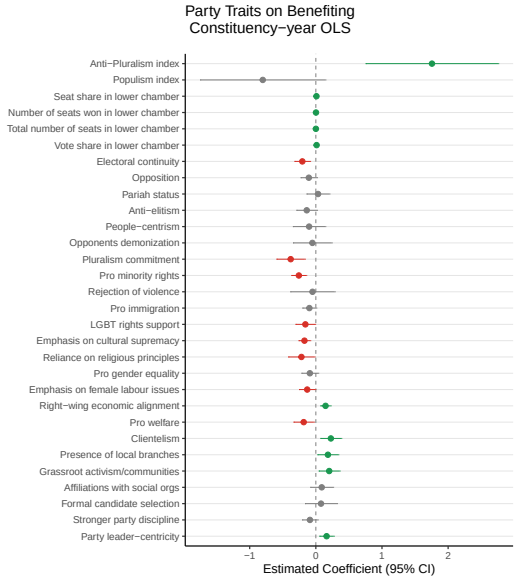
Figure C.1. Decade-by-decade maps of coordination-failure rates.



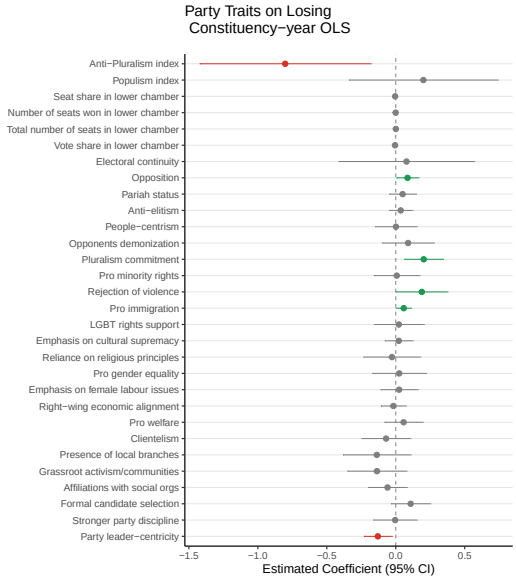
(a) Beneficiary from Coordination Failure on Party Characteristics (OLS)



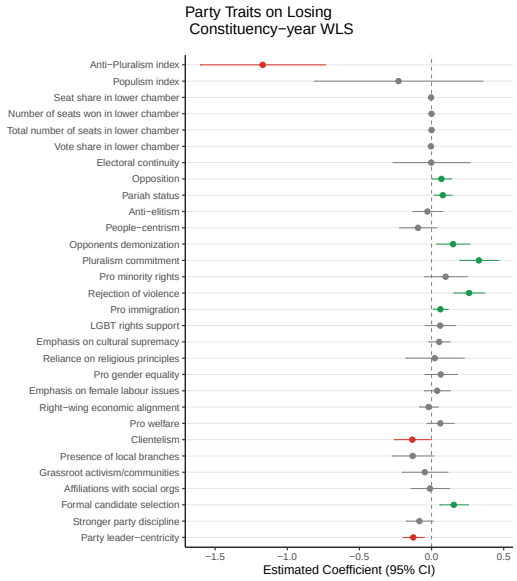
(b) Loser from Coordination Failure on Party Characteristics (OLS)



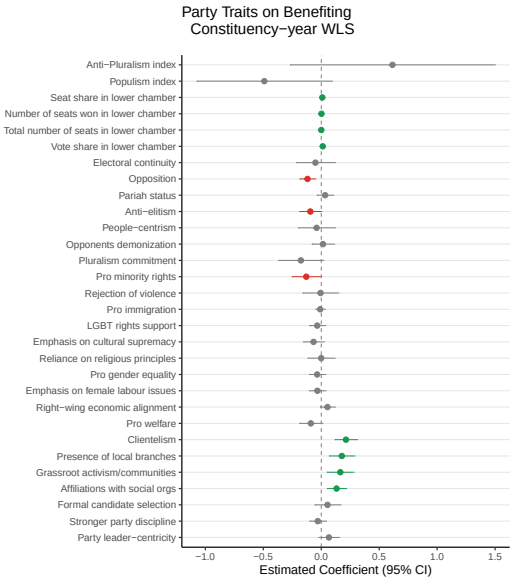
(a) Beneficiary from Strong Coordination Failure on Party Characteristics (OLS)



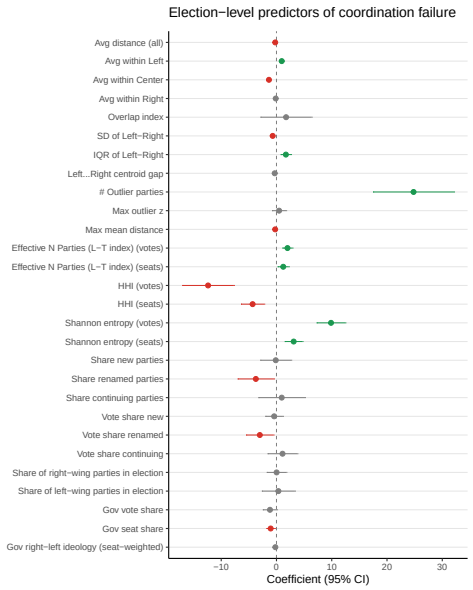
(b) Loser from Strong Coordination Failure on Party Characteristics (OLS)



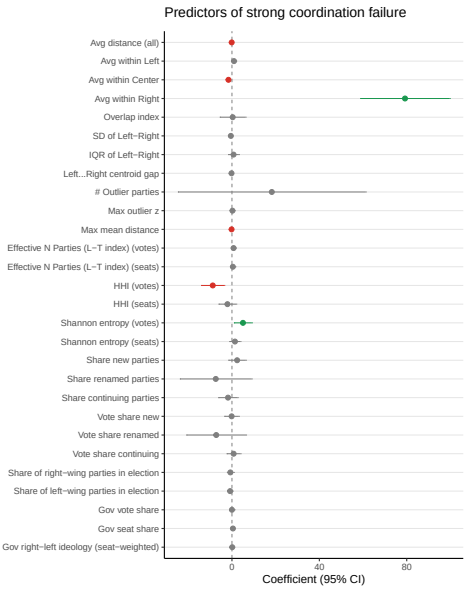
(a) Loser from Coordination Failure on Party Characteristics (WLS)



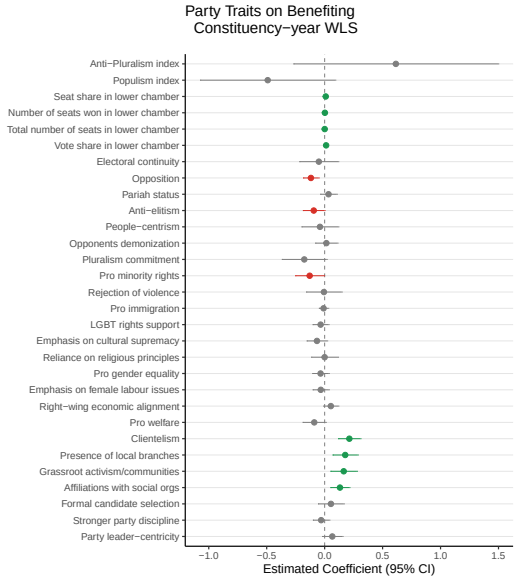
(b) Beneficiary from Coordination Failure on Party Characteristics (WLS)



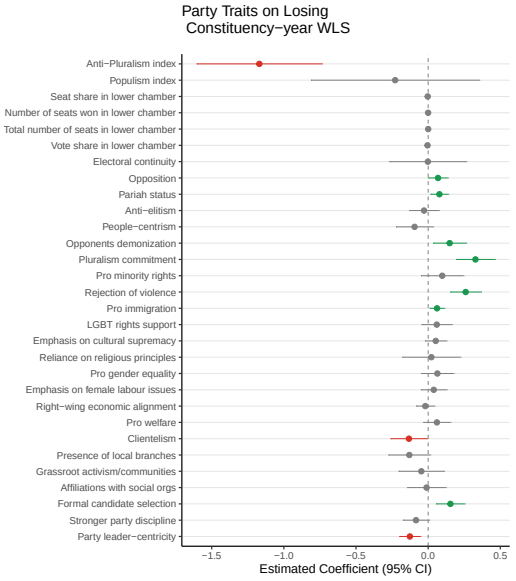
(a) Effect of Election Characteristics on Probability of Coordination Failure (Logit)



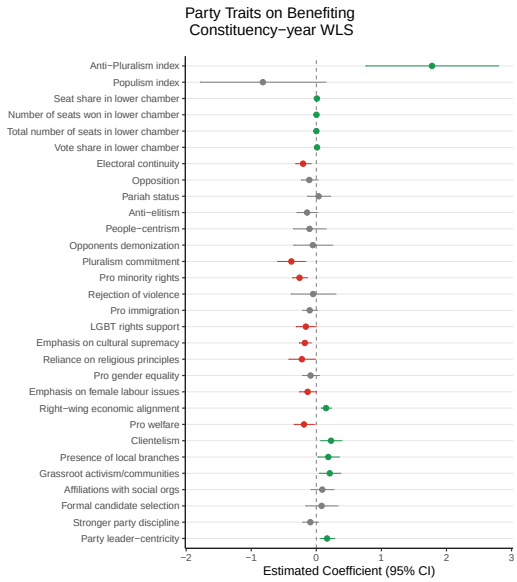
(b) Effect of Election Characteristics on Probability of Strong Coordination Failure (Logit)



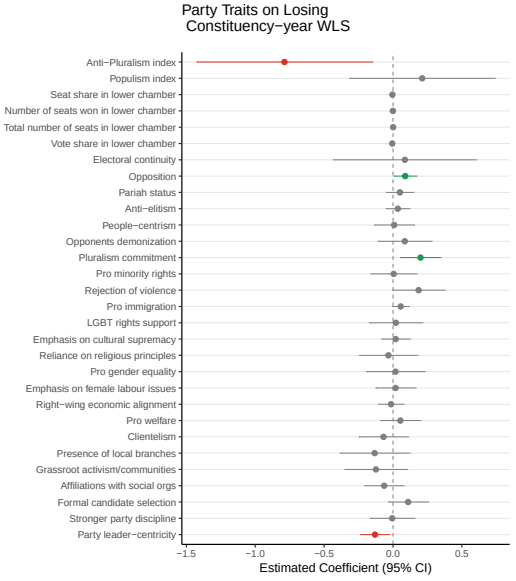
(a) Beneficiary from Coordination Failure on Party Characteristics (WLS)



(b) Loser from Coordination Failure on Party Characteristics (WLS)



(a) Beneficiary from Strong Coordination Failure on Party Characteristics (WLS)



(b) Loser from Strong Coordination Failure on Party Characteristics (WLS)

D Instructions

The four different experiments follow the same design. The first study is a pre-election survey, while the second study is a pre-election survey but closer to the election date with a randomization. The only difference among the experiments applies to the state-specific questions.

D.1 First Study

1. Demographics

What is your name?

What is the name your Lok Sabha consistuency?

Which gender you identify with? 1. Male, 2. Female, 3. Other, 4. Prefer not to answer. Please enter the number.

What is your age?

What is your religion? 1. Buddhist, 2. Christian, 3. Muslim, 4. Hindu, 5. Sikh, 6. Other. Please enter the number.

Which caste group do you identify with? 1. General, 2. S.C, 3. S.T, 4. O.B.C, 5. Other. Please enter the number.

What is your education level? 1. Primary School, 2. Middle school, 3.High School, 4. Pre - University College, 5. Diploma, 6. College Degree, 7. Post graduate degree, 8. Other. Please enter the number.

What is your monthly household income? 1. Below Rs. 5,000, 2. Between Rs 5000 to Rs 10000, 3. Between Rs 10000 to Rs 20000. 4. Above Rs. 20,000. Please enter the number.

What is your profession? 1. Government Job, 2. Salaried Employee, 3. Own Business, 4. Student, 5. Farming, 6. Farm labour, 7. Daily wage earner, 8. Housewife, 9. Other. Please enter the number.

2. General Political Knowledge

Who is the current chief minister of [State]? List of names, 5. I don't know. Please enter the number.

Who was the previous Chief Minister of [State]? List of names, 5. I don't know. Please enter the number.

Name four political parties in [State], checkbox for [parties]

3. Political Preferences

On a scale of 1 to 5, with 1 very poor, 2 poor, 3 mixed/moderate, 4 good, 5 very good how would you rate the following parties who are contesting in the upcoming assembly election? [List of parties] Please enter the number for every party listed in the question

All things considered, how would you rank the three political parties? [List of parties]

Which party do you intend to vote in the upcoming Lok Sabha elections? [List of parties]

4. Second Order Beliefs

Out of 100 voters in your constituency, how do you expect others to vote in this election? [List of parties]

How often do you discuss politics with others? 1 - Never, 2 - Rarely, 3 - Sometimes, 4 - Quite often, 5 - Very often

Could you share with us the name and phone number of a someone you discuss politics with?

5. Issue weights

When you are deciding who to vote for in the upcoming election, how much importance will you give to each of the following factors? For each factor, please tell me whether it is "Most important, Very important, Quite important, Not so important or Not at all important"

- (i) Caste of candidate
- (ii) Party's support for Hindutva
- (iii) Support for tribals
- (iv) Support for farmers
- (v) How others in my community are going to vote
- (vi) Whether candidate is clean and non-corrupt
- (vii) Ability to improve employment opportunities

6. Polls Demand

Would you be interested in receiving a poll with information about how other voters in your constituency plan to vote in the upcoming election?

D.2 Second Study

Thank you for participating in our voter survey. We are interested to learn about your views about the upcoming election.

1. Demographics

What is your name?

2. Treatment

Here is some information about how the voters in your constituency are planning to vote. In your constituency, the top two parties are A and B. X% of voters are planning to vote for A and Y% of voters are planning to vote for B. Z% of voters are planning to vote for C and W% of voters are not yet decided. These voters can consider this information when deciding their vote.

3. Political Preferences

On a scale of 1 to 5, with 1 very poor, 2 poor, 3 mixed/moderate, 4 good, 5 very good how would you rate the following parties who are contesting in the upcoming assembly election? [List of parties]. Please enter the number for every party listed in the question

All things considered, how would you rank the three political parties? [List of parties]

Which party do you intend to vote in the upcoming Lok Sabha elections? [List of parties]

4. Second Order Beliefs

Out of 100 voters in your constituency, how do you expect others to vote in this election? [List of parties]

How often do you discuss politics with others? 1 - Never, 2 - Rarely, 3 - Sometimes, 4 - Quite often, 5 - Very often

Could you share with us the name and phone number of a someone you discuss politics with?

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Would you be interested in receiving a poll with information about how other voters in your constituency plan to vote in the upcoming election?