



UNIVERSITY OF BERGEN  
Department of Comparative politics

**THE VEEPSTAKES:**  
**A study of the selections of American vice presidents from**  
**1940 to 2008**

**Master thesis, November 2009**

Jorun Jordheim Berntsen

## PREFACE

“There are two challenges in writing an article about the vice presidency. One is to write the article; the other is to convince anyone else that it is worth reading”.

(Mayer 2000: 313)

I hope this thesis is worth reading. If so, it is thanks to the help of the following people:

My supervisor Gunnar Grendstad, for excellent guidance and motivational comments.

Douglas Kriner and Jody Baumgartner, for writing such inspirational articles and for being so kind as to provide me with their datasets.

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## ABSTRACT

American vice presidents have become influential and powerful political figures. Yet, they are not popularly elected; since 1940, they have been personally selected by the presidential nominees themselves. This thesis examines these selections in further detail, seeking to identify which characteristics the presidential nominees look for in a running mate. The research question is the following: *Which factors explain the vice presidential selections from 1940 to 2008?*

The theoretical framework for the thesis is a limited one, since the selection of vice presidents has yet to attract much scholarly interest. There are, however, three discernable theories in the literature. First, there is the *ticket-balancing theory*, representing the traditional explanation on the subject. It expects presidential nominees to select running mates that complement them in some way, come from large states and/or have rivalled them for the presidential nomination. The *theory of increased complexity*, on the other hand, claims that these traditional selection criteria is only part of the explanation and should be supplemented by a set of modern selection criteria. Finally, the *theory of changed dynamics* contends that traditional selection criteria no longer govern the selections. Now, the presidential nominees' primary concern is to select a running mate with political experience.

The three theories are assessed comparatively, through the use of a conditional logistic regression. The data is provided by Douglas Kriner and Jody Baumgartner.

The evaluation of the theories indicates that the ticket-balancing theory has less explanatory power than the two other theories. Thus, the thesis proposes a synthesis model that combines the theory of increased complexity and the theory of changed dynamics. This model shows that presidential nominees generally have chosen ambitious running mates that enjoy much media coverage, whilst they do not pick running mates that rivalled them for the presidential nomination. Also, a difference over time is observable: Prior to 1976, presidential nominees tended to pick running mates from populous states, but the same tendency is not existent after 1972. Lastly, the presidential nominees have probably been conscious of the running mates' genders and ethnic backgrounds: Some have wanted the tickets to be demographically balanced, whilst most would not even consider the possibility of such balance.

# TABLE OF CONTENTS

<b>1</b>	<b>INTRODUCTION.....</b>	<b>1</b>
1.1	THE THESIS' SCIENTIFIC CONTRIBUTION .....	1
1.2	TOPICAL RELEVANCE .....	2
1.3	STRUCTURE OF THE THESIS.....	3
<b>2</b>	<b>FROM IRRELEVANCE TO SIGNIFICANCE.....</b>	<b>4</b>
2.1	THE VICE PRESIDENCY IN THE CONSTITUTION.....	4
2.2	DEVELOPMENT OF VICE PRESIDENTIAL POWER.....	5
2.3	THE CHANGES IN THE VICE PRESIDENTIAL SELECTION PROCESS .....	8
2.4	CHAPTER SUMMARY .....	9
<b>3</b>	<b>THREE COMPETING THEORIES OF VICE PRESIDENTIAL SELECTION... </b>	<b>10</b>
3.1	THEORETICAL POSTULATIONS.....	11
3.2	THEORETICAL PROPERTIES .....	21
3.3	BACKGROUND OF THE THEORIES .....	22
3.4	THEORETICAL EXPECTATIONS: THE DEVELOPMENT OF HYPOTHESES	23
3.5	CHAPTER SUMMARY .....	25
<b>4</b>	<b>THE CONDITIONAL LOGISTIC MODEL .....</b>	<b>26</b>
4.1	STATISTICAL RESEARCH DESIGN .....	26
4.2	THE ADVANTAGES OF THE CONDITIONAL LOGISTIC REGRESSION.....	27
4.3	THE MODEL .....	27
4.4	MODEL PROPERTIES .....	34
4.5	MODEL COMPARISON AND CONSTRUCTION.....	38
<b>5</b>	<b>DATA.....</b>	<b>40</b>
5.1	TIME SPAN .....	40
5.2	UNITS OF OBSERVATION .....	40
5.3	THE DEPENDENT VARIABLE: FIRST-CHOICE.....	47
5.4	INDEPENDENT VARIABLES .....	48
<b>6</b>	<b>ANALYSES.....</b>	<b>55</b>
6.1	DESCRIPTIVE STATISTICS – RANGE AND DISTRIBUTION.....	55

6.2	DESCRIPTIVE EXPLORATION OF WITHIN-GROUP VARIANCE .....	59
6.3	MODEL 1: THE TICKET-BALANCING THEORY .....	61
6.4	MODEL 2: THE THEORY OF INCREASED COMPLEXITY .....	64
6.5	MODEL 3: THE THEORY OF CHANGED DYNAMICS .....	69
6.6	MODEL COMPARISON.....	72
6.7	STEP-WISE CONSTRUCTION OF THE SYNTHESIS MODEL.....	73
6.8	SUMMARY OF THE EMPIRICAL FINDINGS.....	79
<b>7</b>	<b>CONCLUSION.....</b>	<b>82</b>
7.1	IMPLICATIONS FOR THE THEORETICAL FRAMEWORK .....	82
7.2	IMPLICATION FOR FUTURE RESEARCH .....	83
7.3	IMPLICATIONS FOR EMPIRICAL REALITY.....	84
<b>8</b>	<b>LITERATURE .....</b>	<b>86</b>
<b>9</b>	<b>APPENDIX .....</b>	<b>92</b>
9.1	OVERVIEW OF THE DELTA-BETA VALUES OF THE “CRITICAL CASES” .	92
9.2	REPLICATIONS OF MODEL 3.....	93

## LIST OF TABLES

TABLE 3.1 THEORY COMPARISON .....	11
TABLE 3.2 TICKET-BALANCING THEORY HYPOTHESES.....	24
TABLE 3.3 THEORY OF INCREASED COMPLEXITY HYPOTHESES .....	24
TABLE 3.4 THEORY OF CHANGED DYNAMICS' HYPOTHESES ON TRADITIONAL SELECTIONS .....	24
TABLE 4.1 STRENGTH OF EVIDENCE BASED ON THE DIFFERENCE IN BIC .....	33
TABLE 5.1 THE "CRITICAL CASES" 1960-1992.....	41
TABLE 5.2 THE "CRITICAL CASES" 1992-2004.....	44
TABLE 5.3 COMBINATION OF DATASETS H&K AND JB.....	46
TABLE 5.4 THE FINALIST POOL, 1940-2008.....	47
TABLE 5.5 VARIABLES OF TICKET-BALANCING THEORY .....	49
TABLE 5.6 MODERN VARIABLES OF THE THEORY OF INCREASED COMPLEXITY .....	51
TABLE 5.7 VARIABLES OF THE THEORY OF CHANGED DYNAMICS .....	53
TABLE 6.1 DESCRIPTIVE STATISTICS OF THE INDEPENDENT VARIABLES.....	56
TABLE 6.2 WITHIN-GROUP VARIANCE FOR THE DUMMY VARIABLES.....	59
TABLE 6.3 MODEL 1: THE TICKET-BALANCING MODEL.....	61
TABLE 6.4 CORRECTLY PREDICTED CASES IN MODEL 1 .....	63
TABLE 6.5 MODEL 2: MODEL OF INCREASED COMPLEXITY .....	64
TABLE 6.6 CORRECTLY PREDICTED CASES IN MODEL 2 .....	68
TABLE 6.7 MODEL 3: MODEL OF CHANGED DYNAMICS.....	69
TABLE 6.8 CORRECTLY PREDICTED CASES IN MODEL 3.....	71
TABLE 6.9 OVERVIEW OF VARIABLES WITH SIGNIFICANT EFFECTS IN MODELS 1, 2 AND 3 .....	73
TABLE 6.10 LIKELIHOOD RATIO TESTS OF ALTERNATIVE VARIABLES' CONTRIBUTION TO MODEL 4.....	74
TABLE 6.11 MODEL 4: THE SYNTHESIS MODEL.....	75
TABLE 6.12 LIKELIHOOD RATIO TEST OF MODEL 4 VS MODEL 5 .....	76
TABLE 6.13 MODEL 5: THE FINAL SYNTHESIS MODEL.....	77
TABLE 6.14 CORRECTLY PREDICTED CASES IN THE FINAL SYNTHESIS MODEL.....	79
TABLE 6.15 THE FINDINGS OF THE FINAL SYNTHESIS MODEL: .....	80
TABLE 8.1. DELTA-BETA VALUES OF THE "CRITICAL CASES" 1960-2004*.....	92
TABLE 8.2 MODEL 3 WITHOUT POLITICAL EXPERIENCE PRE-1976.....	93
TABLE 8.3 MODEL 3 WITHOUT POLITICAL EXPERIENCE POST-1972.....	93

## LIST OF FIGURES

FIGURE 3.1 THE TRADITIONAL VARIABLES OF THE TICKET-BALANCING THEORY .....	13
FIGURE 3.2 VARIABLES OF THE THEORY OF INCREASED COMPLEXITY .....	16
FIGURE 3.3 VARIABLES OF THE THEORY OF CHANGED DYNAMICS .....	18

# 1 INTRODUCTION

The American vice presidency has become an office of major political importance. Consequently, the question of how the vice presidents are chosen should be of great current interest. Yet, scholarly attention devoted to this subject has been scarce. There is posited but three distinct theories on the mechanisms governing the selections of vice presidents. Seeking to expand on that theoretical framework, this master thesis tests the three theories statistically. Through the comparison of their compliance with empirical data, the thesis aims to answer the following question:

*Which factors explain the vice presidential selections from 1940 to 2008?*

The first of the three theories, the *ticket-balancing theory*, is the conventional wisdom on the subject. Its core postulation is that the vice presidential candidates are chosen because they have characteristics that the presidential nominees lack. The *theory of increased complexity*, on the other hand, focuses on the increasingly complex calculus that the presidential nominees face in their selection of running mate. It contends that a multitude of modern selection criteria have emerged to supplement the traditional ticket-balancing variables. Finally, the *theory of changed dynamics* claims that reforms of the selection process in the early 1970's have transformed the mechanisms governing the selections. The traditional selection criteria are now redundant, rendering political experience as the most crucial asset for a vice president.

These theories are evaluated and compared on the basis of three separate conditional logistic regression models. In turn, the results of these analyses lead to the construction of a final model combining the most pertinent variables explaining vice presidential selections.

## 1.1 THE THESIS' SCIENTIFIC CONTRIBUTION

The subject of the American vice presidency is largely understudied. Indicative of this is the shortage of academic works that are published. There is merely a handful of book-length publications that focus on the vice presidency (for example Goldstein 1982; Baumgartner 2006; Walch 1997; Kengor 2000b), and the many textbooks on the American presidency typically devote just a couple of pages to the second office. Accordingly, the specific topic of *vice presidential selection* has virtually been ignored. Only a few studies have been conducted on the subject, and they have analyzed different datasets, emphasized different variables and

presented diverging results (Hiller and Kriner 2008; Sigelman and Wahlbeck 1997; Baumgartner 2008). Thus, the thesis will represent a valuable contribution to the literature, both by filling an apparent void in the literature and by contributing to the limited existent theoretical framework.

## **1.2 TOPICAL RELEVANCE**

Not only does the topic of vice presidential selection represent an unexplored territory for political scientists, it is also a matter of central political importance. Four arguments substantiate that claim.

First, the selection of the vice president is the first significant decision that a presidential nominee makes. It thus provides a unique opportunity for the candidate to command the nation's attention on his own terms, shape the campaign dynamic to his advantage and give a first impression of his style of government (Berke 2004). Illustratively, George W. Bush described the choice of running mate as a "tell-all" judgment about the presidential nominee (Berggren 2001).

Second, the selection of the vice president is often assumed to have an impact on the result of the general election. This assumption applies particularly to the so-called bad choices; selecting the wrong person for the job may be hurtful for the presidential nominee (Goldstein 1982; Adkison 1982). Most recently, such allegations were directed towards John McCain's running mate in 2008, Sarah Palin. Both political commentators (CNN 2008; Bergthold 2008; Carney and Scherer 2008) and empirical studies (Ulbig 2009; Brox and Cassels 2009; Heflick and Goldenberg 2009) have placed more or less of the blame for McCain's loss in the presidential campaign on her.

Third, a selection of a vice president is effectively a selection of a potential president. In case of presidential resignation, death or disability, the vice presidency will provide the successor for the nation's highest post. Also, the office has a certain political springboard effect. Since 1945, most vice presidents have subsequently pursued the presidency themselves and five of them have proceeded to become presidents in their own rights (Natoli 1988b). Thus, one can argue that the office has become "the surest route to a presidential nomination" (Hurwitz 1980: 509).



Finally, the vice presidency has emerged as a political power base of its own. One need only look to the tenure of vice president Dick Cheney for illustration: The concept of “vice presidential power” is no longer an oxymoron (Azari 2006; Light 1984). The investigation of the selection of the office-holders must therefore be considered an important venture, as the political ramifications of the vice presidential choice can possibly be crucial.

### **1.3 STRUCTURE OF THE THESIS**

The vice presidency is not an institution familiar to all. Therefore, *chapter two* of the thesis discusses the historical development of both the office and the selection process. Thereafter, *chapter three* establishes the thesis’ theoretical framework, by introducing and comparing the three relevant theories. *Chapter four* follows by presenting the conditional logistic regression model, whilst *chapter five* focuses on the data material for the thesis. The analysis is thus conducted in *chapter six*. Finally, the findings are summarized and concluded upon in *chapter seven*.

## 2 FROM IRRELEVANCE TO SIGNIFICANCE

This chapter provides a brief summary of the historical development of the vice presidency, from an office of virtually no importance to a post of great political powers. Also, it discusses the most important transformations of the vice presidential selection process.

### 2.1 THE VICE PRESIDENCY IN THE CONSTITUTION

The vice presidency's constitutional mandate is a weak one. In fact, the Framers of the Constitution created the office as an afterthought: It was seen not as a necessity of its own, but as a means to perfecting the governmental system they already had imagined (Albert 2005). Thus, they assigned it with only two specific functions. Most important was the successor role: In case of presidential vacancy, the vice president would take over. Yet, the nature and duration of such a succession was left unspecified in the Constitution. That was a latent source of confusion until 1841, when John Tyler became the first successor president. He set the precedence by both assuming full powers and staying in office for the remainder of the presidential term (Felzenberg 2001). Since then, nine vice presidents have served as successor presidents<sup>1</sup>.

The other task rendered the vice president in the Constitution was to preside over the Senate, casting tie-breaking votes. However, this did not give the office significant powers. On the contrary, as vice presidents were placed in a hybrid position between legislative and executive, it could rather be regarded as an obstacle. Both Congress and the presidential administration would tend to regard the vice presidents with some suspicion, as they were not fully a part of either branch of government (Milkis and Nelson 2008). Illustratively, it was even argued that the Constitution prevented the vice president from increasing its powers. The reasoning was that presidential delegation of tasks or functions to the vice president would be inconsistent with the principles of separation of powers, as the vice president was presiding officer of the Senate (Goldstein 1982).

To complicate matters more, the Framers also provided for a peculiar selection process of the vice presidents. Aiming at the most qualified man for the job, they decided that the person

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<sup>1</sup> The nine other successor presidents were Millard Fillmore (1850), Andrew Johnson (1865), Chester A. Arthur (1881), Theodore Roosevelt (1901), Calvin Coolidge (1923), Harry Truman (1945), Lyndon B. Johnson (1963) and Gerald Ford (1974) (Milkis and Nelson 2008: 500-501).

with the second most votes in the Electoral College should be afforded the title. Because this effectively meant that the president's principal opponent in the election became his vice president, it opened for animosity and rivalry between the two office-holders. That was the case between John Adams and Thomas Jefferson in 1796 and later between Thomas Jefferson and Aaron Burr in 1800. The relationship between the latter pair was especially difficult, as Jefferson had only marginally won after an initial tie between them. Thus, in order to exclude his opponent from government, Jefferson called for the Twelfth Amendment. This was enacted in 1804 and provided that presidential and vice presidential candidates ran together as a ticket, and that electors would cast votes for each office separately (House 2008).

## **2.2 DEVELOPMENT OF VICE PRESIDENTIAL POWER**

As a consequence of the vice presidency's feeble Constitutional basis, it enjoyed low status from the beginning. Derogatory remarks about the office's irrelevance were rampant, and frequently posited by the office-holders themselves. Illustratively, the first vice president John Adams referred to his position as "the most insignificant office that ever the intention of man contrived or his imagination conceived" (Kincade 2000: 3).

The Twelfth Amendment did not ameliorate the situation. It entailed that the vice presidential candidate was chosen by party leaders, and these leaders seldom took the opinion of the presidential nominee into account. Rather, they aimed to please the factions of the party that were least content with the nomination. Thus, they selected running mates that were starkly different than the presidential nominee, for example in terms of ideological perspective, regional belonging and/or religious denomination. This strategy of ticket-balancing did not foster a friendly relationship between the ticket-holders. Consequently, once the presidents were in office, they were generally reluctant to include their vice presidents in governmental affairs (Milkis and Nelson 2008: 455).

However, at the start of the twentieth century, the vice presidency's political status was boosted. This was partly due to the rise of mass media and a new style of presidential campaigning. Starting with Theodore Roosevelt in the election of 1900, the vice president campaigned actively for the presidential ticket. Through travels and media-transmitted speeches, the public profile of the vice presidency was raised. In turn, this attracted increasingly able politicians to the office. Prominent figures such as Nobel Prize laureate Charles Dawes and Senate majority leader Charles Curtis took the office in the 1920's. Yet,

these office-holders generally did not gain substantial influence. It was not until the late 1930's that the real growth in political powers began (Williams 1956).

### ***2.2.1 Mid-century acceleration - the bomb***

The New Deal politics of Franklin D. Roosevelt and World War II lead the governmental duties to grow enormously, both in number and complexity. Inevitably, that required an enlargement of the presidential administration. The creation of the Executive Office of the President in 1939 was a milestone in that respect, streamlining the presidential bureaucracy and increasing the organizational apparatus. This expansion of government affected the vice presidents; it pulled them closer into the presidential orbit (Baumgartner 2006; Kengor 2000a).

Roosevelt's vice president, John Nance Garner, was initially very influential, acting both as Roosevelt's advisor and his liaison to Congress (Williams 1956). However, the relationship between the two soured in Roosevelt's second term, illustrated by Garner's referral to his position as "not worth a pitcher of warm piss" (Baumgartner 2006: 3)<sup>2</sup>. Thus, Roosevelt replaced Garner with Henry Wallace in 1940. Wallace continued the tradition of counseling the president, but his involvement in Congress was more ceremonial than substantial. This reflects another trend in vice presidential development: Whilst influence in government has expanded, participation in the legislative branch has decreased.

The tenures of Garner and Wallace both represented advances of vice presidential power and influence. The ensuing vice presidency of Harry Truman would be a setback in that development. Roosevelt's third vice president was kept largely in the dark on important government issues. He is reported to have been largely ignorant of the existence of the atomic bomb when Roosevelt died in 1945 (Milkis and Nelson 2008; Natoli 1988a). As a result of this scandalous situation, later presidents have to an increasing extent sought to ensure that their vice presidents would never come into power as ill-prepared as Truman was. They involved the vice presidents more in foreign and domestic policy issues, gave them a seat in the National Security Council and drafted the Twenty-Fifth Amendment. The latter incident was especially important: The amendment clarified the conditions of vice presidential succession to the presidency and provided that a new vice president should be appointed if the office became vacant (Felzenberg 2001; Natoli 1982).

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<sup>2</sup> Notably, this comment was made 20 years after Garner had been vice president.

One of the authors of the amendment, Richard Nixon, was also one of the vice presidents that used the office as a springboard to the presidency. However, not only was his presidential tenure cut short by the Watergate-affair, his vice president Spiro Agnew was too struck by a scandal. Agnew was charged with corruption, extortion and tax fraud and had to resign in 1973. His replacement for the vice presidency was Gerald Ford, who in turn became president when Nixon stepped down in 1974. As president, Ford selected Nelson Rockefeller as his second officer, but replaced Rockefeller with Bob Dole in his bid for re-election in 1976. Thus, Ford became the last president to ever swap out his running mate: All subsequent presidents have run for re-election with the same running mate as in the first term (Sirgiovanni 1994).

### ***2.2.2 Institutionalisation of the modern vice presidency***

It is the presidency of Jimmy Carter that is generally attributed the institutionalisation of the modern vice presidency (Goldstein 2008: 377). The moderate southern governor chose the northern liberal Walter Mondale, with two terms of experience in the Senate, for the office. Mondale became the first vice president to have an ongoing, central role in the government, as Carter relied on him for advice on all aspects. He was given an office in the West Wing, increased staff, regular meetings with the president and unfettered access to important information and meetings (Natoli 1977). Thus, he rendered his successors with an entirely new set of resources to draw upon.

Subsequent vice presidents have all taken advantage of these resources, but neither George H. W. Bush nor Dan Quayle was as influential as Mondale. In that respect, the “Double Bubba” ticket of the young moderate Southerners Bill Clinton and Al Gore became the first to carry on the Mondale legacy. Gore took a pivotal role in the government, both as Clinton’s advisor and as the principal decision-maker on certain policy areas (Berke 1998; Goldstein 2008).

Still, in terms of political influence, Gore is surpassed by his successor Dick Cheney. Cheney served a multitude of governmental functions, but his most important role was being George Bush jr’s closest confidant and advisor. Through this position, he is thought to have influenced the president to an unprecedented extent. Commentators and political insiders frequently attribute him an immense part of the responsibility of the government’s actions, especially on economy and security issues (Gellmann and Becker 2007; Subhawong 2008).

Indeed, Cheney's extraordinary political authority have earned his two-term tenure classifications such as "the imperial vice presidency" (Blumenthal 2007).

Though only having served months in office, current vice president Joseph Biden already is an influential figure in the administration. Apparently, this was assured in advance: Before accepting the vice presidential nod, Biden was guaranteed that his post would not be ceremonial, but that he would have substantial responsibilities. Still, his role is considerably different from those of his immediate predecessors. Whilst Gore had responsibility of discrete political areas and Cheney was his own power centre, Biden is more of an interdisciplinary advisor and trouble-shooter, and is involved in every aspect of government (Leibovich 2009).

### **2.3 THE CHANGES IN THE VICE PRESIDENTIAL SELECTION PROCESS**

Three significant transformations of the vice presidential selection process can be identified. The first of these concerns the decisional power. Since the introduction of the Twelfth Amendment, local party bosses had selected the vice presidential candidate. However, in 1940, Franklin D. Roosevelt bucked the party leaders by making his own candidacy contingent upon the nomination of Henry A. Wallace. That marked the start of what is referred to as the "modern era" of vice presidential selection, characterized by the presidential candidate's personal selection of his running mate (Jones 1994: 94). Only in 1956, when Adlai Stevenson deferred the choice of running mate to the convention, have party leaders since had any formal role in the decision-making<sup>3</sup>.

The second change of the vice presidential selection process occurred in 1972. The Democratic Commission on Party Structure and Delegate Selection, informally known as the McGovern-Fraser Commission, issued several institutional reforms on the presidential nomination process. As a response, most states went from selecting the convention delegates in closed party councils to electing them in direct primaries. This provided that the presidential candidates normally knew that they would receive the nomination at an earlier point in time than before. Therefore, they were given more time to select the vice president. The reforms also effectively applied to the Republican Party, as many of the states codified them in their laws (Milkis and Nelson 2008).

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<sup>3</sup> Notably, because of Stevenson's actions in 1956, Baumgartner (2006) identifies the following election year, 1960, as the start of the modern era of vice presidential selection. The norm is, however, to treat 1940 as the demarcation line between traditional and modern selections.

A third and related transformation occurred in 1976. Until then, vice presidential selections had typically been the results of hasty decisions. This is exemplified by George McGovern's selection of Thomas Eagleton in 1972, made in a marathon session that left no time to investigate Eagleton's past. Days later, it was revealed that he had undergone electroshock treatment for depression and fatigue. Though Eagleton was pressured into resigning, the affair became a liability for McGovern, who eventually lost the presidential election (Strout 1995). In 1976, however, Carter introduced a particularly meticulous selection process. His aides initially constructed a list of 400 names. That list was in turn narrowed down to include fourteen potential candidates, whose strengths and weaknesses were tested by a pollster<sup>4</sup>. The seven that made the eventual shortlist were interviewed and asked to submit personal information to the vetting team, before Carter finally settled on Mondale (Goldstein 1982; Light 1984). This form of vetting process has since become the norm for vice presidential selection<sup>5</sup>.

## **2.4 CHAPTER SUMMARY**

The history of the vice presidency is a tale of transformation. From being an office of virtually no political relevance, it has developed into a post of central political importance. As a natural consequence, the selection of the vice presidents has too gained currency as a salient issue for politicians. Since 1940, presidential nominees have asserted their right to select their running mates themselves instead of leaving the choice to party leaders. Also, they have to an escalating extent put their energy in the search for the right candidate, as demonstrated by the vetting processes becoming both longer and more intense.

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<sup>4</sup> Polls has admittedly been used earlier, for example by Johnson in 1964 and Nixon in 1968, yet it was never before used as part of such a thorough vetting procedure as in 1976 (Adkison 1982).

<sup>5</sup> Albeit with the exceptions of Gerald Ford's choice of Robert Dole in 1976 and Ronald Reagan's choice of George H. W. Bush, which were both last-minute choices (Baumgartner 2006: 63).

### 3 THREE COMPETING THEORIES OF VICE PRESIDENTIAL SELECTION

As seen in the preceding chapter, the vice presidency has risen in importance. However, the scholarly interest in the office has not seen a parallel growth. Academic literature on the subject is still very limited in scope; the few lengthier publications that do exist are often descriptive and written primarily to convince the readers that the office is not irrelevant<sup>6</sup>. Inevitably, that renders the thesis with a relatively narrow theoretical framework. There are, however, three theories that are posited to explain the selection of the vice presidents.

For reasons of brevity, the theories have all been designated with names pertaining to their theoretical core. The first theory is the *ticket-balancing theory*. It represents the conventional wisdom on the vice presidential selection and was tested by Siegelman and Wahlbeck in the first rigorous empirical study of the subject in 1997. The *theory of increased complexity* is derived from Jody Baumgartner's development of a prediction model for Obama's choice of running mate. It was therefore published over a decade later, the same year as Mark Hiller and Douglas Kriner's *theory of changed dynamics* was posited, in 2008. As such, the latter two theories can both be viewed as modified versions of the original ticket-balancing theory.

This chapter is devoted to the introduction and comparison of these three theories. The comparison is based on the theories' contents, their structural properties and the scientific context in which they were posited. The table below indicates the fundamental elements in the comparison between the three theories.

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<sup>6</sup> The most recent example is Jody Baumgartner's book *The American Vice Presidency Reconsidered*. In the preface, the author writes that the "purpose of the book is to rescue the vice presidency from the overwhelmingly negative impression people have of the office and its occupants" (2006: 3)



Table 3.1 Theory comparison

	The ticket-balancing theory	Theory of increased complexity	Theory of changed dynamics
<b>THEORETICAL POSTULATIONS</b>			
<i>Dependent variable</i>	First choice	Actual nominee	First choice
<i>Unit of analysis</i>	Shortlist finalists	Shortlist finalists	Shortlist finalists
<i>Explanatory variables</i>	Traditional	Modern <i>and</i> traditional	Modern <i>or</i> traditional
<i>Temporal change</i>	None	Incremental	Threshold (1972/1976)
<i>Selection incentives</i>	Electoral, party appeasement	Electoral	Electoral, governance
<b>THEORETICAL PROPERTIES</b>			
<i>Complexity/parsimony</i>	Parsimonious	Complex	Parsimonious
<i>Actor/ institution</i>	Actor-centred	Actor-centred	Institutional
<b>BACKGROUND OF THE THEORIES</b>			
<i>Research goal</i>	Explain	Predict	Explain
<i>Empirical track record</i>	Poor	Good	Good

### 3.1 THEORETICAL POSTULATIONS

The theories offer fundamentally different explanations of the vice presidential selections. Yet, since both the theory of increased complexity and the theory of changed dynamics are built on the basic assumptions of the ticket-balancing theory, they also share certain commonalities. The key differences and similarities are summarized below in the five following categories: Dependent variable, unit of analysis, selection incentives, explanatory variables and temporal change.

#### 3.1.1 *Dependent variable*

The theories all aim to explain the same thing: The presidential nominees' personal selections of the vice presidential candidates. Yet, they operate with slightly different dependent variables. The ticket-balancing theory and the theory of changed dynamics both aim to identify the politicians that were *firstly asked* to serve as vice presidential candidates. Whether the respective politicians actually accepted these offers is considered irrelevant. The third theory, the theory of increased complexity, takes a different approach: Its dependent variable is the actual vice presidential nominee.

However, this does not necessarily place the theory in an entirely different category than the other two theories. Hiller and Kriner (2008: 410) state this clearly: “There is considerable evidence that the dynamics underlying the selection of the first-choice running mate also characterize the selection process of the eventual nominee”. This thesis builds on this claim, arguing that despite the theories’ different understandings of the dependent variables, they are fundamentally comparable.

### ***3.1.2 Units of analysis***

When the presidential nominee starts searching for his running mate, he draws from an almost unlimited amount of politicians that might be considered for the job. For instance, as commented upon in chapter 2, Jimmy Carter started his search with a list of 400 names. Yet, at some point in the vetting process, the original list is condensed to include the candidates that are viewed as most promising. The candidates on this ultimate shortlist constitute the pool from which the presidential nominee selects the eventual running mate. These are referred to as the *vice presidential finalists* and are the units of analysis of all the three theories.

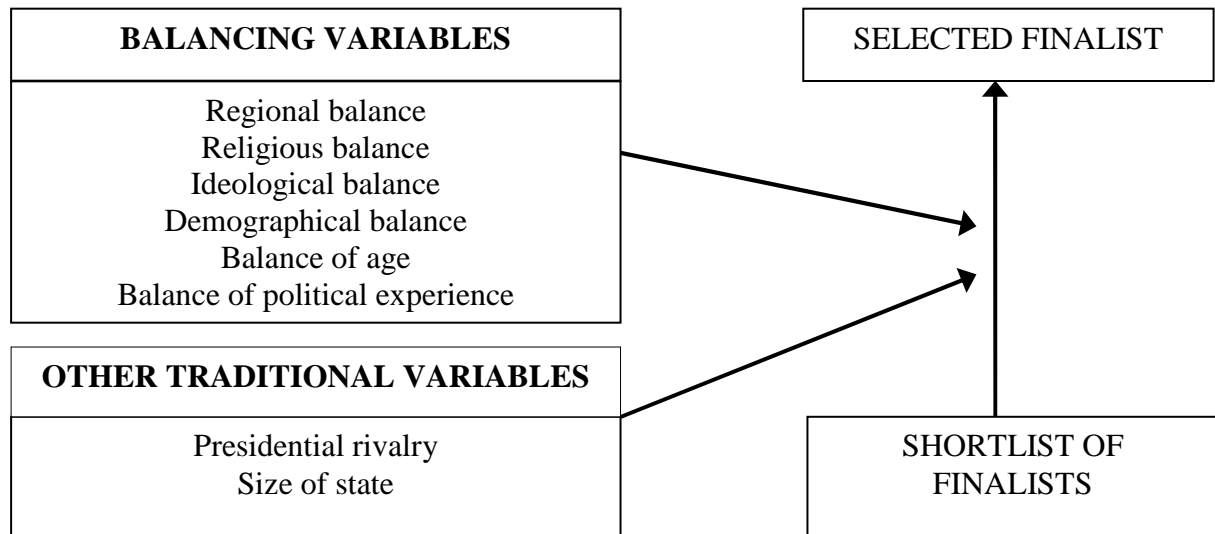
### ***3.1.3 Explanatory variables***

So what makes the presidential nominee prefer one shortlisted candidate over the others? The theories all postulate that the choice is based on the characteristics of the alternatives. These characteristics constitute the explanatory variables of the vice presidential selection.

#### *Traditional ticket-balancing variables*

The ticket-balancing theory represents the “conventional wisdom” on the subject. Thus, the variables pertaining to the theory are labeled *traditional*. An overview of the variables, as well as an illustration of the causal relationship is presented in the figure below.

Figure 3.1 The traditional variables of the ticket-balancing theory



As the name of the theory indicates, the bulk of the variables revolves around a balanced ticket. These variables expect a running mate to complement the presidential nominee, by bringing qualities to the ticket that the nominee lacks. The characteristics of the vice presidential candidates are thus practically irrelevant in themselves, but valuable if they are opposite to those of the presidential nominee.

The theory envisages six ways that the vice presidential candidate can balance the ticket.

First, the ticket can have *regional balance*. This means that the presidential candidate picks a running mate from a different geographical region. An example of a believer in this strategy is President Carter, as he reportedly refused to even consider running mates that hailed from the same part of the country as himself (Rosenstone 1983)<sup>7</sup>.

Second, there is *religious balance*. This has generally translated into a Protestant presidential candidate choosing a Roman Catholic running mate, and, to a lesser extent, the opposite. In the period between 1964 and 1996, almost one-third of the major party tickets was of a Protestant-Catholic composition (Berggren 2001). Historically, other Christian denominations have also been represented, but there has only been one non-Christian vice presidential

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<sup>7</sup> The notion of geographical balance is also present in the Constitution, as the Twelfth Amendment actually prohibits electors from voting for both a presidential and vice presidential candidate from the same state as themselves. However, this particular provision does not pose a real limitation to the selection of a vice president. For example, Dick Cheney lived in George W. Bush's home state Texas, but relocated to Wyoming before accepting the vice presidential nomination.

nominee: In 2000, Democrat Joe Lieberman became the first Jewish candidate to appear on a major party ticket (Boxleitner 2008: 33).

Third, the *ideological balance* variable builds on the assumption that presidential nominee selects a vice presidential candidate from an opposing ideological faction of the party. The Democratic ticket of 1988 is an example of this strategy. Going to the polls in an intensely Reaganite atmosphere, the Republican presidential candidate George H. W. Bush enjoyed great support from conservative voters. In an attempt to capture some of Bush's electoral base, the Democrat's liberal presidential nominee, George Dukakis, opted for the conservative Lloyd Bentsen as running mate (Toner 1988).

Fourth, there is the *demographical balance* variable. This tactic is not as firmly established as other balancing strategies. Both gender stereotypes and racial prejudice has been found to influence American elections strongly and selecting a female candidate or a candidate from a racial/ethnic minority has occasionally been considered an electoral hazard (Sigelman and Wahlbeck 1997; Lawless 2004; Kinder and Sanders 1996). That is not to say that the strategy has not been followed, tickets have been demographically balanced on three occasions. In 1984, Walter Mondale picked Geraldine Ferraro, reportedly because he wanted to exploit a gender gap in the electorate and because he sought to rival his presidential contender Gary Hart's guarantee of picking a minority running mate. (Baumgartner 2006: 74; Bonk 1988). In addition, both tickets in the 2008 presidential campaign were demographically balanced. The Democratic ticket was the first to include a black presidential nominee and, according to the campaign manager of John McCain, Sarah Palin was chosen largely to appeal to the large number of women that originally had supported the presidential candidacy of Hillary Clinton (Brox and Cassels 2009).

Fifth, the *age balance* variable entails that presidential nominees pick running mates of different age cohorts than themselves. This may take the form of a young presidential candidate selecting an older running mate or vice versa. For example, on the Republican ticket of 1988, George H. W. Bush was 23 years older than Dan Quayle. This age difference was explicitly used in the campaign: Bush himself commented on his choice of Quayle as a "statement of confidence in a younger generation" (Boyd 1988).

Finally, the ticket can be balanced in terms of *political experience*. Again, the Carter-Mondale ticket may serve as an example. Carter's background as a governor was deliberately balanced by Mondale's weighty experience from the Senate:

I considered it vital to choose a member from Congress as my running mate in order to provide some balance of experience to the ticket. Without ever having served in Washington myself, I needed someone who was familiar with the federal government and particularly with the legislative branch.

(Carter 1982: 35)

Such balance may also be achieved in the opposite manner. It is generally argued that presidential candidates with extensive legislative experience have more leeway to select a Washington outsider than presidential candidates that were outsiders themselves. Thus, the choice of Palin in 2008 matches the ticket-balancing theory on this variable. Despite her limited political experience, which according to presidential scholar Joel K. Goldstein was "not consistent with the normal criteria for determining who's of presidential calibre" (Barbash and Mark 2008), her position as governor balanced McCain's long-term experience in the Senate.

Lastly, the theory also incorporates two selection variables that do not intuitively fit under the ticket-balancing umbrella, but that nevertheless are parts of the conventional wisdom on vice presidential selections. First, there is *rivalry for the presidential position*. The argument is that presidential nominees tend to look among his defeated competitors for the presidential nomination, thereby offering them a consolation prize in the form of the vice presidency (Jones 1994). The Democratic ticket of 2004 can be considered an example of this strategy, as John Kerry paired up with his former rival for the presidential nomination, John Edwards.

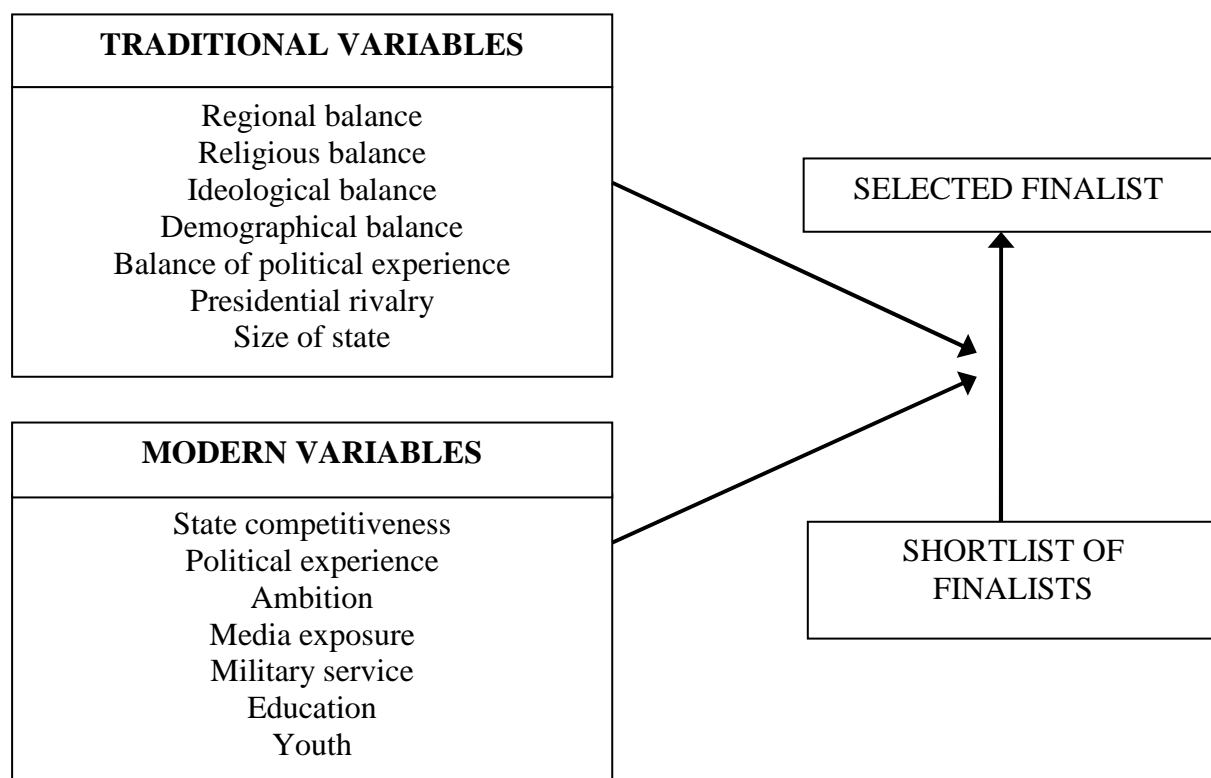
The second of the non-balancing variables deals with the *size of the vice president's home state*. The presidential nominee is expected to pick a running mate from a state with many electoral votes, hoping that the running mate would carry the state for the ticket. Though the real effect of this "home state advantage" repeatedly is found to be little or even non-existent (Romero 2001; Dudley and Rapoport 1989; Tubbesing 1973), the presidential candidate's belief in its impact may still influence the selection. By this logic, John F. Kennedy's may have selected Lyndon B. Johnson because he hailed from Texas. In 1960, Texas was the state with the third most electoral votes in the US, and political commentators have frequently

speculated that it was in fact Johnson that made Kennedy win the state (for example Purdum 2004).

*The theory of increased complexity: Mix of modern and traditional variables*

The theory of increased complexity builds upon the ticket-balancing theory. It includes many of the traditional variables, yet introduces a variety of modern selection criteria as well. An overview of the variables of the theory is presented below.

Figure 3.2 Variables of the theory of increased complexity



As seen in this figure, the theory includes seven out of the eight traditional variables that were part of the ticket-balancing theory. It opens for the possibility that presidential candidates will choose running mates that balance the tickets, were rivals for the presidential nomination and/or come from populous states. The only traditional variable that is not incorporated in the theory is *balance of age*<sup>8</sup>.

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<sup>8</sup> Baumgartner (2008) includes variables that measure balance of region, demography, ideology and political experience in the analysis, but not any variables that measure balance of age. Thus, though the exclusion of the variable is never explicitly elaborated on, the thesis assumes that age balance is not considered vital for explaining the selections in the theory of increased complexity. However, the age aspect is included in the final of the variables, *youth*.

Yet, in addition to the traditional variables, the theory introduces seven additional variables. The argument is that along with the growth of vice presidential responsibilities, the selection process has become an increasingly complex affair. It does no longer revolve solely around balanced tickets and state size, but also around a set of modern selection criteria. First, there is *state competitiveness*, resting on the claim that presidential candidates will select running mates from a state where both parties have an actual chance of winning. If the presidential race is close in the state, the hope is thus that the vice president would be the decisive factor tipping the electoral in favor of the ticket.

Second, the theory postulates that the presidential nominees choose politicians that have weighty *political experience*. Third, they must have political *ambition*. Politicians that have sought high-ranking political offices in the past (regardless of whether they was afforded the position), signal that they are ambitious. Consequently, the presidential nominee can expect them to have an interest in the vice presidency, which will increase their chances of being selected.

Fourth, *media exposure* may provide the vice presidential candidate with an element of name recognition that can enhance the electoral appeal of the ticket. Also, as the media plays an important role in scrutinizing politicians, it could be regarded as a supplement to the presidential nominee's own vetting process. If a politician has enjoyed much media attention without revelations of closet skeletons, the presidential candidate would be inclined to select him. Accordingly, in the vice presidential selections of 2008, the Democratic choice was more in line with the theory than the Republican choice, as Joe Biden had spent more time in the national limelight than his Republican counterpart. A poll conducted immediately after the Republican convention illustrates this, as Sarah Palin enjoyed a substantially lower degree of name recognition than Biden did (Newport 2008).

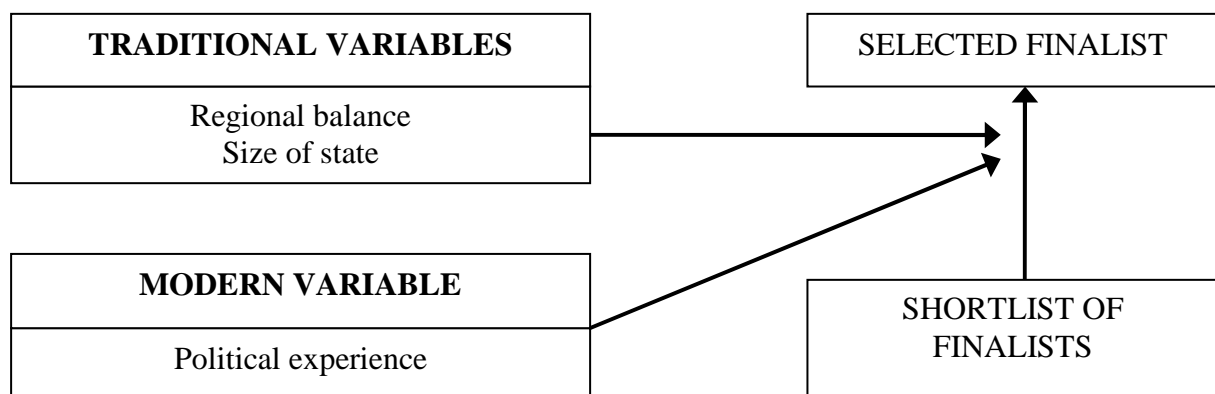
Fifth, the theory postulates that politicians with a record of *military service* are likely to be selected as vice presidents. Arguably, military experience could be viewed as an important preparation for the role as commander-in-chief. Also, such experience has historically been an electoral advantage for an aspirant to practically every political office, leading many post-World War II politicians to polish their resumes with military service (Baumgartner 2006: 41).

Finally, the theory's remaining two variables suggest that presidential candidates will be inclined to choose running mates that add *high education* and/or *youth* to the ticket.

*The theory of changed dynamics: Modern or traditional variables*

The variables of the theory of changed dynamics are also dividable in the dichotomy of traditional and modern. However, unlike the theory of increased complexity, the separation between the traditional and modern is absolute: The traditional variables determined the earlier vice presidential selections, whilst contemporary selections are determined by a single modern variable.

Figure 3.3 Variables of the theory of changed dynamics



The figure shows that there are two traditional variables and one modern selection criterion that are attributed particular importance by the theory. The logic is that in previous selections, the vice presidential candidates' geographical base was the important matter. The tickets should be balanced regionally and the home state of the finalist should have many electoral votes. In contrast, recent selections are not at all governed by these traditional selection criteria. Rather, the presidential nominees seek competent co-workers that have lengthy experience in politics. As such, the pairing of Bill Clinton and Al Gore in 1996 can serve as an example of the modern selection dynamics. Gore resembled Clinton on most variables and added little balance to the ticket, but he had vast political experience, having served a total of 24 years in Congress prior to his tenure as vice president.



### 3.1.4 *Temporal change*

The discussion of the relevant explanatory variables shows that the theories have different perspectives of *change over time*. The ticket-balancing theory expects the dynamics of the vice presidential selections to be largely unchanged from 1940 to 2008, whilst the two other theories both contend that the mechanisms behind vice presidential selections have transformed during this period.

First, the theory of increased complexity envisages the selection process to have developed incrementally throughout the twentieth century. The modern selection criteria have gradually emerged to supplement the traditional variables, and the presidential nominees have had to consider an increasing number of factors when selecting the running mates. That has logically led the traditional criteria to decrease in importance during the period of 1940-2008 (Baumgartner 2008: 765).

In contrast, the theory of changed dynamics presents a specific threshold for the change in the mechanisms of selection. According to the theory, the shift from traditional to modern was caused by two confluent events: McGovern's selection of Thomas Eagleton and the McGovern-Frazer reform, both occurring in 1972<sup>9</sup>. First, the Eagleton affair demonstrated the potential damage the selection of a wrong running mate could do to a presidential campaign and thus signaled the need for a thorough vetting process. The possibility to conduct such a vetting process was in turn provided by the second event: The institutional reforms on the presidential nomination process that caused the move from party caucuses to primaries. That made the presidential candidate certain of his status as a nominee at an earlier point in his election campaign. Thereby he was given more time to interview potential running mates. Also, by transferring the locus of power from the party leaders to the electorate, the reforms gave rise to more candidate-centered politics. The incentive for pleasing the different party leaders/factions thus diminished and the presidential candidate was freer to make the decision on his own terms (Hiller and Kriner 2008)<sup>10</sup>.

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<sup>9</sup> These events are both discussed in further detail in chapter 2, section 2.3.

<sup>10</sup> By the same token, the theory of changed dynamics offers an explanation for the increasing power of the vice presidency: As running mates are selected on their own merits, and not as a means to achieve party unity, the presidents will generally have more confidence in them and be more willing to entrust them with responsibility (Hiller and Kriner 2008).

### 3.1.5 *Selection incentives*

As already thoroughly stated, presidential nominees make the selection of running mate based on his or her characteristics. But why are these characteristics important; what is the ultimate goal of the selection? Scholars agree that presidential nominees must balance two fundamental objectives when choosing the running mate. First, there is the governance criterion. A vice president should have the capacity to govern the country, in case he succeeds to the presidency. Second, there is the electoral criterion. The choice of running mate should broaden the presidential nominee's appeal in the general election and maximize the ticket's chance of victory (Grofman 1995).

Obviously, these two criteria have the potential to be conflicting. In the event of such a conflict, however, there is consensus in the literature that the latter criteria would be the prevailing one (Hiller and Kriner 2008; Polsby et al. 2008; Goldstein 1982; Tubbesing 1973). Following this, all three theories present the presidential candidates' primary rationale for selecting vice presidents as electoral. Certain variances are nevertheless detectable: In particular, the ticket-balancing theory and the theory of changed dynamics both include supplementary perspectives.

The ticket-balancing theory incorporates an element of *party appeasement*. This has obvious historical roots. In the period between the enactment of the Twelfth Amendment in 1804 and Franklin D. Roosevelt's personal selection in 1940, party leaders balanced the ticket primarily to maintain party unity (Adkison 1982). The ticket-balancing theory extends some of that logic to modern vice presidential selection as well. Although presidential candidates will balance the ticket mainly to broaden its electoral appeal, they also aim to increase the chance of the various party factions' approval of the ticket.

The theory of changed dynamics is in partial agreement with the ticket-balancing theory, by stating that the incentive of party appeasement was important in the selections before 1976. However, after 1972, it contends that the selections are more oriented towards the *governance* criterion: The primary motive is that the vice president is capable to serve as president. Still, that does not mean that the theory places the governance criterion above the electoral criterion. Rather, it supports Michael Nelson's argument that governance and electoral criteria has been brought into more conformity in recent elections.

... most presidential nominees realize that voters now care more about the presidential competence and loyalty – the ability to succeed the presidency ably and to carry on the departed president’s policy faithfully – than they do about having all religious faiths or party factions on the ticket.

(Nelson 1988: 862)

## **3.2 THEORETICAL PROPERTIES**

The theories differ not only in terms of their substantive content, but also with regards to more structural characteristics. The most striking differences between the theories in this regard revolve around parsimony and institutional focus.

### **3.2.1 *Complexity/parsimony***

Two of the theories offer relatively clear-cut arguments of the dynamics behind vice presidential selections. The ticket-balancing theory includes a set of eight traditional variables of which most are characterized by the same logic of ticket-balancing, and the theory of changed dynamics incorporates only three different explanatory variables. This results in theoretical parsimony on the part of those two theories. In contrast, the theory of increased complexity is a far-from-parsimonious theoretical explanation. Though the variables are dichotomously organized in the categories of traditional and modern, the large number of them (fourteen in total) still prohibits any uncomplicated summaries of the theoretical core.

### **3.2.2 *Actor/institution***

The theory of changed dynamics portrays the cause for the transformation of the vice presidential selection process as a combination of two events, one actor-driven and one institutional. However, in a comparison, the actor-driven event (the selection of Eagleton) should arguably be considered subordinate. Though the Eagleton affair demonstrated the importance of a background check of the candidates, such a check would not have been made possible without an alteration of the institutional framework. It was the McGovern-Frazer reform that gave the presidential nominees more time to search for a running mate and more confidence to select a candidate without necessarily pleasing disgruntled party factions. Thus, the theory of changed dynamics can be seen as having an institutional focus. In contrast, the ticket-balancing theory is clearly actor-centered: If the presidential candidates’ choices are constrained, it is by other actors within the party rather than institutional forces. Likewise, the theory of increased complexity does not include specific references to the institutional

framework. Its portrayal of the vice presidential selection process can thus be seen as primarily actor-driven.

### **3.3 BACKGROUND OF THE THEORIES**

The three theories are drawn from different backgrounds. The most notable difference is perhaps that the ticket-balancing theory represents the conventional take on the vice presidential selections, whilst the two other theories build on its theoretical assumptions. Thus, the theory of increased complexity and the theory of changed dynamics can be considered modified versions of the ticket-balancing theory. Yet, this is not the only divergence between the theories' backgrounds: They were posited with dissimilar research goals and their performances in previous empirical tests have been different.

#### ***3.3.1 Research goal***

Both the ticket-balancing theory and the theory of changed dynamics were put forward in an effort to *explain* the modern vice presidential selections. The theory of increased complexity, on the other hand, was posited with a different research goal in mind: The empirical analysis by Baumgartner (2008) of which the theory of increased complexity is derived, was done in order to launch a prediction model of the 2008 vice presidential selection. Though the concepts of 'prediction' and 'explanation' are subject to much controversy in methodological literature, this thesis builds on an assumption that the difference between them is of a merely pragmatic character. At least in statistically oriented social science research, the logic of analysis is basically the same (Hempel and Oppenheim 1948; Hanna 1969: 309). That allows for the theory of increased complexity to be taken to account for the vice presidential selections of the entire period from 1940 to 2008, i.e. the variables that are used to forecast the outcome of future selections should also explain for the selections in the past.

One could argue that the differing theoretical research goals could have an implication for the coherence of the theories. As noted above, the theory of increased complexity postulates the gradual emergence of the modern selection criteria in the historical selections of vice presidents. Yet, a forecasting model would implicitly benefit the most from capturing the *currently* prevailing mechanisms governing the vice presidential selections. That could lead to the assumption that the theory of increased complexity is less coherently constructed than the other two theories and that the explanatory power of the theory would be better for recent

selections than for earlier ones. However, this objection does not hold when considering that the forecasting model of the theory of increased complexity was constructed using the exact same methodological procedure as the two other theories. To check which variables that would influence the 2008 selection, Baumgartner (2008) relied on a statistical analysis of which variables that affected the selections of 1960 to 2004. As such, there should be no reason why these theories cannot be directly compared.

### ***3.3.2 Empirical track records***

The three theories have all been tested empirically in previous studies using the same statistical method (Sigelman and Wahlbeck 1997; Hiller and Kriner 2008; Baumgartner 2008). However, the tests were conducted on different datasets and with dissimilar variables. Thus, direct comparisons of the theories' performance in these studies, are impossible. Still, one can remark on a clear tendency: The ticket-balancing theory performed the weakest. The explanatory variables did not perform in accordance with the theoretical expectations. In comparison, both the theory of changed dynamics and the theory of increased complexity fared better in the respective statistical tests of them.

## **3.4 THEORETICAL EXPECTATIONS: THE DEVELOPMENT OF HYPOTHESES**

As demonstrated in this chapter's comparison of the three theories, they will yield very different hypotheses on the results of the thesis' statistical analysis. Thus, to conclude the chapter, these hypotheses will be presented.

### ***3.4.1 The ticket-balancing theory***

The ticket-balancing theory assumes that all the traditional variables influence the selection of vice presidents positively. Presidential nominees tend to select running mates that balance the ticket in some way, have competed for the presidential nomination and/or come from a populous state. Furthermore, the theory does not expect this to have changed over time: The effects of the variables are depicted as stable and unvarying in the period from 1960 to 2008. On that basis, one can derive eight hypotheses from the theory, as presented in the table below.

Table 3.2 Ticket-balancing theory hypotheses

Hypotheses	Variable	Effect on vice presidential selections
H1	Regional balance	Positive
H2	Ideological balance	Positive
H3	Religious balance	Positive
H4	Demographical balance	Positive
H5	Balance of political experience	Positive
H6	Age balance	Positive
H7	Presidential rivalry	Positive
H8	Size of state	Positive

### 3.4.2 *The theory of increased complexity*

Notably, seven of the eight hypotheses linked to the ticket-balancing theory are also in accordance with the theory of increased complexity (the exception being H6). However, the theory of increased complexity supplements the traditional criteria with seven *modern* selection criteria. Thus, seven corresponding hypotheses H9-H15 are presented.

Table 3.3 Theory of increased complexity hypotheses

Hypotheses	Variable	Effect on vice presidential selections
H9	State competitiveness	Positive
H10	Ambition	Positive
H11	Media exposure	Positive
H12	Political experience	Positive
H13	Education	Positive
H14	Youth	Positive
H15	Military service	Positive

### 3.4.3 *The theory of changed dynamics*

The theory of changed dynamics postulates that the traditional selection criteria only mattered in the period before the vice presidential selection in 1976. In the ensuing vice presidential selections, they had insignificant and/or unsubstantial effects. Instead, the selections after 1972 are assumed by the theory to be dominated by one selection criteria alone: Political experience. This leaves three hypotheses to be deduced:

Table 3.4 Theory of changed dynamics' hypotheses on traditional selections

Hypotheses	Variable	Effect on vice presidential selections
H16	Geographical balance	Positive <i>only</i> before 1976
H17	Size of state	Positive <i>only</i> before 1976
H18	Political experience	Positive <i>only</i> after 1972

### **3.5 CHAPTER SUMMARY**

As demonstrated by this chapter, the three theories differ on many aspects. Still, the core difference between them is perhaps best conveyed by looking to two particular aspects: The main explanatory variables and the inclusion of time as a modifying variable. This is reflected in the eighteen hypotheses that are derived from the theories. They present traditional and modern explanatory variables to either have a constant or a time-limited effect on the vice presidential selections. These hypotheses will be tested in this thesis through the use of a conditional logistic model, a method that is presented in the following chapter.

## 4 THE CONDITIONAL LOGISTIC MODEL

This chapter accounts for the thesis' usage of the conditional logistic regression<sup>11</sup>. Firstly, it discusses the advantages of a statistical research design. Secondly, it argues that the conditional logistic regression is particularly suitable for the research question. Thirdly, it gives a formal presentation of the statistical model, as well as an explanation of how the results of the analysis are estimated and interpreted. Fourthly, it clarifies the fundamental properties and statistical requirements of the model. Lastly, the chapter explains how the conditional logistic regression is used to compare the three theories.

### 4.1 STATISTICAL RESEARCH DESIGN

Research methodology is often differentiated by the dichotomy of qualitative and quantitative. Adopting that vocabulary, the thesis takes a quantitative approach. There are two main reasons for this. First, the thesis focuses on the causal mechanisms that govern vice presidential selections. Statistical methods are well suited for investigating such causal relationships, largely because it provides the researcher with means to isolate the causal effects by holding other variables constant (Lijphart 1971). Second, the thesis covers the period from 1940 to 2008. This corresponds to a total of 27 vice presidential selections, all of which are between at least three candidates<sup>12</sup>. Thus, one can argue that the nature of the research question calls for a large-N study.

Of course, there are important trade-offs between quantitative and qualitative methods (Poteete and Ostrom 2005; King et al. 1994; George and Bennett 2005). Among the biggest potential downfalls for quantitative research design is the drawing of faulty causal inferences. An inevitable implication of large-N studies, as opposed to for example case studies, is a loss of detail. In the worst consequence, potentially important nuances can be overlooked, leading for example to overestimations of causal relationships (Ragin 2004). Necessarily, one must take steps to preclude such occurrences: Gaining thorough theoretical insight and being aware of issues related to validity and reliability may help remedy these problems (Adcock and Collier ; King et al. 1994).

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<sup>11</sup> The conditional logistic regression is often also referred to as the conditional logit regression, the fixed-effects logistic regression, the discrete-choice model or (in economics) McFadden's choice model. However, this thesis will consistently use the designation *conditional logistic regression*.

<sup>12</sup> Excluding the two instances where the incumbent vice presidents were left on the ticket or was selected by the party convention, in the 1940 Republican selection and the 1956 Democratic selection.



## **4.2 THE ADVANTAGES OF THE CONDITIONAL LOGISTIC REGRESSION**

The dependent variable in this thesis' analysis is binary: Either the potential vice presidential candidate was selected or not. This entails that a form of logistic regression is appropriate (Hair 2008: 355). Yet, conditional logistic regression is preferable over simple logistic regression. The reason lies mainly in the thesis' theoretical foundation. Presidential nominees are in all three theories assumed to make choices between different vice presidential candidates and, importantly, these choices are based on the various attributes of the candidates. The conditional logistic regression is designed specifically for this type of choice-situation. It operates with alternative-specific variables, as opposed to standard logistic regression's case-specific variables. That means that the explanatory variables have different values for each choice alternative (instead of each decision-maker). Thus, it can model how the presidential nominees' choice is affected by the characteristics of the vice presidential finalists (Long and Freese 2006: 297; Powers and Xie 2000: 239; Maddala 1983: 42).

Another factor speaking for the suitability of the research method is the unconventional configuration of the thesis' data material. The sets of alternatives that the presidential nominees have to choose from are not fixed. Both the number and characteristics of the alternative vice presidential candidates vary greatly between both party and election year. For example, whilst the 1944 Republican presidential candidate Thomas E. Dewey had only two candidates on his shortlist, Democrat Walter Mondale considered eleven potential candidates in 1984. Though the common usage of conditional logistic regression is on data of choices between a fixed set of alternatives, it also allows for stratified data with varying choice sets. In such applications, each choice is modeled as a function of the alternatives that are available to the relevant decision-maker in that given year (Sigelman and Wahlbeck 1997; Powers and Xie 2000: 241; Pardoe and Simonton 2008: 6).

## **4.3 THE MODEL**

The conditional logistic model was firstly developed by Daniel McFadden for the study of travel demand (Long 1997: 179; McFadden 1976). Later, its usage has been extended, and it has been applied in a variety of scientific studies investigating choices between discrete alternatives (e. g. Hausman et al. 1995; Hensher et al. 2005; Iain Pardoe 2008; Pardoe and Simonton 2008; Boskin 1974; Alvarez and Nagler 1998).

In the formalization of the model, the probability that an alternative  $j$  will be chosen is conditioned upon the likelihood that another alternative will be chosen instead. This is expressed by the following formula (Maddala 1983: 42):

$$\text{Prob} [y_i = j] = \frac{\exp(\beta' x_{ij})}{\sum_{k=1}^m \exp(\beta' x_i)}; \quad j \neq k$$

where  $\text{Prob} [y_i = j]$  is the probability that a presidential nominee will select a candidate  $j$  from the pool of candidates  $i$  (demarcated by party and election year). That is estimated as a function of the characteristics  $x_{ij}$  of candidate  $j$  divided by the sum of the characteristics  $x_i$  of the other potential candidates  $m$  in the pool.  $k$  is each potential candidate that is considered by the presidential nominee. In accordance with the convention in the literature,  $k = 1, 2, \dots, m$  for the total of  $m$  alternative candidates.

#### **4.3.1 Estimation**

Most statistical software packages estimate the conditional logistic regression model. This thesis uses the `.clogit` command in STATA.

As in standard logistic regression, the estimation procedure for the conditional logistic regression is Maximum Likelihood Estimation (MLE). The model estimates the probability of an event occurring (in this case, the selection of a vice presidential finalist). Also, like in simple logistic regression, the binary character of the dependent variable in the conditional logistic model constrains this predicted value to the range between 0 and 1. To move beyond this limitation and transform the dichotomous dependent variable into a metric variable of both negative and positive values, a two-step calculation process of the probability is conducted. Firstly, the probabilities are restated into odds. In this application, the odds is the probability of the selection of a vice presidential candidate divided by the probability of the same candidate not being selected. Secondly, the logit values are calculated. That is done by taking the logarithm of the odds. Effectively, this means that odds less than 1 will have a negative logit value, whereas odds greater than 1 will have a positive logit value (Hair 2008: 361; Powers and Xie 2000).

### 4.3.2 Interpretation

The logit coefficients, odds and probabilities can all be used to retrace information of the independent variables' effect on the vice presidential selections.

The *logit coefficients* are not as intuitively interpretable as coefficients in linear regression. They are expressed in terms of logarithms, a unit of measure that is not easily understandable when depicting change of probabilities. Thus, they give little substantial information about effect sizes. Rather, they indicate the direction of the relationship, whether it is positive or negative. Also, they are tested for statistical significance through the use of the *Wald statistic*, which is the logistic regression's functional equivalent to the *t* value in linear regression. In this respect, the thesis will take a liberal approach, accepting p-values that are above the standard .05 threshold as statistically significant. That is both justified both by sample size (the N is 168, which is quite small in a quantitative context) and the arbitrariness of even setting such a threshold (Gelman and Stern 2006; Cohen 1990).

In contrast to the logit coefficients, the odds can be used to measure effect sizes, specifically through the *odds ratio*. When dealing with an alternative-specific independent variable, this ratio is calculated by comparing the odds of two neighboring units on a specific variable. Thus, it is the multiplicative effect of a unit change in the variable on the odds of vice presidential selection. Odds over 1 would indicate a positive effect, whilst odds ratios below 1 indicate a negative effect. For example, if investigating the effect of *age* on the vice presidential selection: A hypothetical odds ratio of 2 would mean that if a candidate of any age was one year older, his odds of being selected would multiply by a factor of 2 (Long and Freese 2006: 299)<sup>13</sup>. This can also be transformed into percentages: A factor change of 2 is equal to a percentage change of a 100 %<sup>14</sup>.

Notably, when comparing the effect size of variables, two factors must be taken into consideration. Firstly, because the odds ratios are multiplicative, positive effects have factor changes greater than one and negative effects are bounded between 0 and 1. This has implications for comparisons of effect magnitudes: Positive effects are compared to negative effects by taking the inverse of the negative effect. Continuing with the above-mentioned example: A positive odds ratio of 2 would have the same magnitude as a negative odds ratio

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<sup>13</sup> Notably, that the odds are doubled does not mean that the probabilities are doubled too.

<sup>14</sup> To recalculate factor changes into percentage changes:  $100(\text{factor change}-1) = \text{percentage change}$  (Long and Freese 2006: 180).

of  $.5 = \frac{1}{2}$  (Long and Freese 2006: 179). Secondly, comparisons of the magnitudes of different variables' odds ratios are only meaningful if the variables are coded the same way and have the same units. That entails that the effect sizes of dummy variables can be directly compared to each other, but not to metric variables<sup>15</sup>.

The predicted *probabilities* are also useful in conditional logistic regression analyses. This measure gives an accurate estimate of the likelihood of a vice presidential finalist being selected in each selection pool. The candidates' probabilities sum to 1 for each pool and the finalist with the highest probability within the pool is most likely to become selected. Thus, the probabilities gives valuable information of whether the vice presidential selections that were made correspond to the statistical predictions and/or theoretical expectations.

### 4.3.3 *Assessing the overall model*

To evaluate conditional logistic regression models' fit, the thesis primarily uses the following measures: The *likelihood ratio test*, the *adjusted McFadden's R<sup>2</sup>*, and the *Bayesian Information Criterion (BIC)*. However, before presenting these indicators in further detail, a note of caution must be included: They should only be treated as rough indicators of a model's adequacy. The information provided by the measures is only partial and must be assessed within the context of the theoretical foundation of the analysis, past research and the estimated parameters of the models being considered (Long and Freese 2006). This is also the reason why several different measures of model suitability are considered by the thesis.

The first measure, the *likelihood ratio test* and its associated test of statistical significance, evaluates whether the model's fit to the data is better than mere chance. As such, it is functionally analogous to the F-test in linear regression, being an absolute measure of overall model significance. The test is based on the logarithm of the likelihood value, which works as an indicator of a model's lack of fit: A "perfect fit" is represented by a log likelihood of 0<sup>16</sup>. Thus, the chi-square test compares the log likelihood value of the estimated model of interest to the base model of null parameters. The comparison is done by taking the difference in the log likelihood values between the two models (the base model and the estimated model) and

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<sup>15</sup> In simple logistic regression, coefficients that are standardized to a unit variance for the dependent variable are often used for comparisons between metric variables of different units (Menard 2004 ). However, Stata does not estimate standardized coefficients for the conditional logistic regression model (Long and Freese 2006: 95).

<sup>16</sup> The "perfect fit" is more a theoretical concept than a practical one. If the R<sup>2</sup> in fact reached the value 1, it would rather be indicative of a flawed model (see Greene 2003: 683).

multiplies this with  $-2$ <sup>17</sup>. The resultant value is subsequently compared to a chi-squared statistic with degrees of freedom equal to the number of estimated parameters for the two models (assuming that the sample size is constant)<sup>18</sup>. The formula for the test is the following (Hensher et al. 2005: 330):

$$-2 (LL_{base\ model} - LL_{full\ model}) \sim X^2_{(number\ of\ new\ parameters\ estimated\ in\ the\ estimated\ model)}$$

If the likelihood ratio test is statistically significant, that means that the estimated model significantly improves the log likelihood function of the base model (by reducing the log likelihood to a value closer to 0). Thus, one can reject the null hypothesis that the estimated model is no better than the base model, and assume that the estimated model is statistically significant overall (Hensher et al. 2005: 330; Meyers et al. 2006: 238).

Notably, the likelihood-ratio test can also be used to compare the fit of two models (Long and Freese 2006: 236). The same logic applies, but the comparison is not between an estimated model and the null model, but rather between two models. The single requirement is that the two models are nested. That means that the only difference between the models is that one of them has added one or more variables. In that case, one can observe whether the added variables represent a significant contribution for the model's fit.

The second indicator of goodness-of-fit is the *adjusted McFadden's R<sup>2</sup>*, a measure that Train (2003: 72) recommends especially for models of choices between discrete alternatives<sup>19</sup>. Like the chi-square test, the McFadden's R<sup>2</sup> compares the log likelihood value of the estimated model with a base model. However, instead of measuring absolute model significance, it provides a relative estimate of how well the model fit the data. If the full model fit is no better than the null model, the McFadden's R<sup>2</sup> would equal 0 and in case of a perfect fit, the statistic would be 1. Following this, the measure is parallel to the R<sup>2</sup> in linear regression, in that it is bounded between the values of 0 and 1. Yet, it does not have the same interpretation of "explained variance" as the R<sup>2</sup>: It measures the percentage of increased performance from the base model to another, but the meaning of such percentage increase is not intuitively clear. Thus, the only possible interpretation of the measure is that the model with the highest value has the better fit (Christensen 1997: 128).

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<sup>17</sup> The  $-2\text{Log Likelihood}$  is also frequently referred to as *deviance*.

<sup>18</sup> Thus, in the analysis, the test is denoted  $\text{Chi}^2$  (*degrees of freedom*).

<sup>19</sup> Train refers to the measure as the *likelihood ratio index*.

The adjusted version of the measure is preferable because it penalizes the model for including more predictors. For models containing effective predictors, this penalty will be small relative to the added information of the predictors. In contrast, for models comprising predictors that do not add enough information, the adjusted  $R^2$  may decrease with the addition of a predictor. This is formalized in the following manner (Hensher et al. 2005: 337):

$$R^2 = 1 - \frac{LL_E - K}{LL_B},$$

where  $K$  is the number of parameters included in the model,  $LL_E$  is the log likelihood of the estimated model and  $LL_B$  is the log likelihood of the base model. Notably, when using the adjusted McFadden's  $R^2$ , negative values becomes a possibility. Values below 0 indicates a high penalty for including inefficient predictors (and consequently a very low model fit).

The third likelihood-based indicator of model fit is the *Bayesian Information Criterion (BIC)*<sup>20</sup>. Following Long and Freese (2006: 112), BIC for the model  $M_k$  is defined as

$$BIC = -2 \ln L (M_k) - df_k \ln N$$

Thus, like the chi-square test, the BIC uses the  $-2\text{Log Likelihood}$  as point of departure, but subtracts the degrees of freedom ( $df$ ) in the model and multiplies it with the logarithm of the total number of observations in the model ( $N$ ). The formula shows that, like the adjusted Mcfadden's  $R^2$ , BIC introduces a penalty term for the number of parameters in the model and can also take a negative value.

Notably, the BIC is also a relative measure: The idea is to compare models. The model with the lowest BIC value represent the best fit and should thus be preferred (Powers and Xie 2000: 106). How strong that preference is, depends on the magnitude of the difference between the models. The suggested guidelines for the strength of evidence are presented in the table below.

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<sup>20</sup> There are at least three different ways of defining the BIC statistic, but the definitions will all yield the same relative results (Long and Freese 2006: 113)

Table 4.1 Strength of evidence based on the difference in BIC

Absolute difference in BIC	Evidence
0-2	Weak
2-6	Positive
6-10	Strong
>10	Very strong

Source: (Long 1997: 112)

Finally, an estimate of the actual versus predicted vice presidential selection can be used to assess a model's predictive capacity. The *percentage of correct predictions* out of the total number of predictions is calculated, based on the premise that only one of the alternatives can be chosen in each selection pool<sup>21</sup>. However, this measure is subject of criticism, both for being based on incorrect premises and for being inaccurate. Firstly, Train (2003: 73) warns that the practice of measuring correctly predicted cases is based on a wrongful assumption that the researcher has complete information. Choice probabilities should ideally be interpreted to mean that if the choice was conducted numerous times, each alternative would be chosen a *certain proportion* of the time. However, in using the number of correctly predicted cases as a measure of goodness-of-fit, one rather implies that the alternative with the highest probability will be chosen *every* time. Secondly, the measure is criticized for being influenced by "luck", as any model, regardless of explanatory power, would be able to generate correct predictions. For example, a choice model with a fixed choice set consisting of two alternatives should by chance be able to predict at least 50% of the cases (Long 1997: 107; Wooldridge 2009: 518)

In spite of these objections, the thesis still includes the percentage of correctly predicted cases, but more as a descriptive summary of a model's predictive capacity than as a direct measure of model fit (Greene 2003: 685; Costanzo et al. 1982). The claim is that the measure provides valuable information about a model's specific predictions that the other three measures of model fit cannot. Though the main object of the thesis is to evaluate the *explanatory* capacity of the different theoretical variables, the theory of increased complexity was explicitly constructed with prediction as the research goal<sup>22</sup>. Thus, it seems relevant to estimate the accuracy of the model's predictions as a part of the general assessment of the models.

<sup>21</sup> For models with dichotomous outcome variables, the percentage of correct predictions is conventionally estimated by applying a basic prediction rule of a .5 threshold, meaning that values over .5 predicts that the event occurred (the vice presidential candidate was selected). However, for this application, the specification of a cut-off point is irrelevant: The prediction would be that the finalist with the highest probability value in the selection pool will be the chosen one.

<sup>22</sup> See chapter 3, section 3.6 for a discussion of explanation vs prediction.

Also, to counter Train's (2003) argument of the wrongful underlying assumptions of the measure: In this thesis' application, the idea of repeating vice presidential selections under identical circumstances is both impossible and irrelevant. It is rather the predictability of the single winner in each selection pool that constitutes a point of interest. The thesis thus contends that one must accept the inherent flaws of the measure, and rather treat the results of the estimate with some caution. It should not be interpreted as a direct indicator of neither model fit nor explanatory capacity, but more as information of the model's predictive capacity that is *subordinate* to the other measures of model fit.

## **4.4 MODEL PROPERTIES**

### ***4.4.1 Discrete choice and utility maximization***

The conditional logistic model can be placed in the category of discrete choice models. Such models are characterized specifically by the existence of an exhaustive, yet finite choice set of mutually exclusive alternatives. Also, they are derived from an assumption of utility-maximizing behavior on the part of the decision-maker: Faced with a range of alternatives, the decision-maker will select the alternative that is associated with the greatest utility. Thus, the probability of an individual selecting alternative  $j$  is equal to the probability that alternative  $j$  has greater or equal utility to the decision-maker than any other alternative.

However, as no researcher can fully measure all aspects of neither the decision-makers' thought processes nor the alternatives' various attributes, one must also include a measure of randomness. The behavioral rule is modified into one of random utility maximization. That means that the probability of an individual choosing alternative  $j$  is the same as the probability that the unknown difference in utility between  $j$  and any other alternative is not bigger than the difference that is known (Hensher et al. 2005:82-83).

### ***4.4.2 Independence of Irrelevant Alternatives***

The conditional logistic model is an extreme generalization of a complex social process. That is especially visible when it comes to the property referred to as the Independence of Irrelevant Alternatives (IIA). This assumption has been criticized for being both naïve and unrealistic (Olsen 1982), but scholars also emphasize its scientific value: "... it is on balance a



very useful simplification that may not necessarily be too unreasonable” (Hensher et al. 2005: 479).

Simply put, IIA assumes that the odds of an alternative being chosen over another is independent of all other available alternatives (Powers and Xie 2000). In the case of this thesis, that means that changes in the shortlist do not affect the odds among the alternative candidates that remain on the list. For example, if Barack Obama considered Democrat Joe Biden to be preferable to the other candidates in the selection pool in 2008, that would not be changed by the fact that Evan Bayh suddenly was eliminated from the shortlist. Nor would the addition of a supplementary candidate on the shortlist change the fact that Biden would be chosen before Bayh.

An implication of the IIA is that all alternatives are perceived as equally similar (or dissimilar) to each other (Amemiya 1981). This can be problematic in some cases, as is illustrated by the classic red bus-blue bus example. In the choice between different transportation modes, the IIA would assume that the likelihood of a person selecting a car or a blue bus is unaffected by the addition of a third alternative in the form of a red bus. That the red bus and the blue bus are more similar to each other than to the car would not be accounted for, and the probability of selecting a car would be made arbitrarily small (Long and Freese 2006; Hensher et al. 2005). Consequently, the conditional logistic model would be inappropriate in the analysis of such a choice set, as the IIA assumption would clearly be invalid.

IIA can be tested statistically, most frequently through so-called *choice set partitioning tests*, the two most common being the Hausman-McFadden test and the Small-Hsiao test. They work by re-estimating the model with a restricted set of choices and compare the estimated coefficients from the full model to those from the limited model (if the IIA holds, the results should be similar) (Long 1997). Yet, these tests are severely criticized for being inadequate means for assessing violations of the IIA property. Firstly, when conducted on the same applications, the Hausman-McFadden test and the Small-Hsiao test often provide conflicting results (i.e. some tests indicate violation of IIA, whilst others do not) (Long and Freese 2006: 243). Secondly, in Cheng and Long’s experiments (2007) where they examined the different choice set partitioning tests, the tests were found to have poor size properties, even in large

sample sizes<sup>23</sup>. Their overall conclusion was that the “tests of the IIA assumption that are based on the estimation of a restricted choice set are unsatisfactory for applied work” (Cheng and Long 2007: 599)<sup>24</sup>.

Following this, the best advice regarding IIA seems to be the statement made by McFadden (1973) that conditional logistic models should only be used in the cases where one can assume that the alternatives are distinct and given independent weight by the decision-makers (Long and Freese 2006: 243). Amemiya (1981: 1517) has also suggested that the models work well when the alternatives can be perceived as dissimilar. In this vein, the thesis contends that the vice presidential finalists meet these requirements. Though they may share commonalities, the finalists are still individuals with different personal qualities. There are no obvious reasons why presidential nominees should perceive them to be anything but dissimilar. Continuing with the above-mentioned example: It seems completely irrational to suspect that if Obama prefers Biden over Bayh, he will change his preference to Bayh when he finds out that a third candidate (say for example Chet Edwards) was eliminated from the shortlist. Hence, an assumption of IIA seems highly plausible.

#### **4.4.3 *Within-group variance***

Seeing as the conditional logistic regression is applied to a stratified sample, it has a specific requirement for the distribution of the variables. For a variable’s effects to be estimated, it is not enough that the variable varies within the dataset. It also needs to have within-group variance, i. e. to vary between the alternative candidates in the different selection pools.

Of course, not all variables will meet the criterion of within-group variance in all selection pools. An illustration of this is the Republican vice presidential selection in 1944. On that occasion, the choice was between two candidates, Earl Warren and John W. Bricker. These candidates both hailed from states that had 25 electoral votes in 1944<sup>25</sup>. Hence, their score on the variable measuring the number of states’ electoral votes is identical and the variable has no effect on the choice between them (Pardoe and Simonton 2008: 7). Yet, this example is not

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<sup>23</sup>The assessment of size properties implies comparing the nominal significance level of a test (e.g., .05, .10) with the empirical significance level in the data structure that does not violate the assumption being evaluated (the proportion of times that the correct null hypothesis is rejected over a large number of replications).

<sup>24</sup> Cheng and Long (2007: 599) assessed the tests on the basis of a multinomial logit model, but the authors explicitly state that the results also applies to conditional logit models

<sup>25</sup> Earl Warren was the governor of California, whilst John W. Bricker was a senator from Ohio.

at all problematic, because the lack of variance is a random, one-time occurrence and not a part of a larger, recurring pattern.

A more problematic example is Jimmy Carter's vice presidential selection in 1970. It has been reported that the primary selection criterion for him was *regional balance*. He would not even consider candidates that came from the same Southern region as himself (Rosenstone 1983). Thus, in that specific selection pool, the *regional balance* variable's true effect would be very positive. Politicians hailing from other regions than Carter would have much greater chances of being selected than politicians from a Southern state. Yet, this positive effect is not captured by the conditional logistic regression, since all finalists are assigned the same value. Logically, if this is a recurring pattern, it would lead to a bias in the variable: If Carter's focus on regional balance was the norm for vice presidential selections and most pools did not include candidates that balance the ticket regionally, the *regional balance* variable's positive effect would be underestimated.

This potential of bias must necessarily be considered an inherent limitation of the thesis' application of conditional logistic regression analysis. Since the shortlist is assembled by the same presidential nominee that makes the final choice, it is plausible that such underlying systematic patterns will occur. However, this limitation will be sought remedied in this thesis, through a thorough descriptive exploration of the variables and their values within the different selection pools. Such an exploration will reveal if any of the independent variables have a remarkably low level of within-group variance. Furthermore, it will observe whether that lack of variance is caused by the predominance of one particular value (for example that all finalists represent regional balance) and thus can cause a biased variable. This thesis' chapter 6 will include the descriptive exploration of the within-group variance.

#### **4.4.4 Multicollinearity**

As in linear regression, logistic regression would be affected by high degrees of correlations between the independent variables. High correlation between several independent variables is referred to as multicollinearity. This phenomenon would potentially cause a substantial distortion of the variable estimates; the standard error would increase and both coefficients and the significance test would become unreliable measures. Though not biasing the results in a statistical sense, the multicollinearity makes it difficult to identify which explanatory variable one should attribute the effect on the dependent variable. Thus, the model's capacity

to generalize about the variables' effects is effectively diminished. Any researcher is advised to include variables that have low multicollinearity, often indicated by the *tolerance* value of the variables (Hair 2008: 226; Allison 1999; Menard 2002)<sup>26</sup>. The proper remedy of multicollinearity (for example removing a variable or creating an index) must take both theoretical and statistical aspects into account. Sometimes the collinearity is an inherent attribute of the phenomenon that is measured, and other times the researcher can create (unnecessary) situations of collinearity, through for example the use of several dummy-variables representing different values of non-metric variables etc (Hair 2008: 266).

#### **4.5 MODEL COMPARISON AND CONSTRUCTION**

In order to compare the statistical performance of the three theories, three separate conditional logistic models are constructed. Each model represents a test of one of the theories and includes only the variables that the respective theory portrays as relevant.

An inevitable implication of this is that no control variables (from the other theoretical perspectives) will be included in these individual models. That could lead to concerns of omitted variable bias, as independent variables that could conceivably explain some of the variation in the dependent variable are intentionally excluded (King et al. 1994: 168-169). Yet, this procedure is followed in a tribute to the shared premise of the theories, which is that they all proclaim (more or less) a capacity to explain the vice presidential selections alone. Assuming that this is the case, control variables derived from the competing theories would reduce the respective theory's fit to the empirical data as measured by the adjusted McFadden's  $R^2$  and the BIC.

The concern of excluding relevant variables will rather be met in the second step of the thesis' analysis chapter: The variables that demonstrate any efficacy/explanatory merit in the individual assessment of the theories will be included in a final *synthesis* model. In that model, variables pertaining to different theories will be controlled against each other, consequently providing a basis for conclusions of which variables that offer the most insight into the dynamics of vice presidential selection.

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<sup>26</sup> The tolerance is 1 minus the proportion of the variable's variance explained by the other independent variables. A high value indicates low collinearity, while tolerance values close to 0 indicate that the variable is almost completely explained by the other variables (Menard 2002: 76).

The final synthesis model could also resolve another possible problem of the individual theoretical models, namely lack of parsimony. Notably, this is never a *statistical* problem for this thesis. The ratio of number of observations to each variable is at all times well above the critical threshold of 5:1 (Hair 2008: 196), even when modeling the admittedly far-from-parsimonious *theory of increased complexity*<sup>27</sup>. Nevertheless, parsimony also has theoretical advantages. Though one should not necessarily consider it an absolute scientific goal, simple explanations are often better than complex ones (King et al. 1994).

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<sup>27</sup> The thesis will at most include 14 variables (in the model testing the theory of increased complexity) on a sample of 168 observations, the ratio thus being over 12:1.

## 5 DATA

The thesis draws upon two separate datasets, compiled by Mark Hiller and Douglas Kriner (2008) and by Jody Baumgartner (2008) for their respective analyses of vice presidential selection. Though these datasets are similar, they differ on fundamental aspects. Therefore, the thesis will use a combination of the two. This chapter presents the combined dataset and discusses its validity. Also, operationalizations of the different variables are introduced.

For reasons of concision, the two datasets will be designated with abbreviated names. Hereinafter, Hiller and Kriner (2008)'s dataset will be referred to as *H&K*, whilst Baumgartner (2008)'s dataset will be referred to as *JB*.

### 5.1 TIME SPAN

Both datasets focus on the vice presidential selections that were made personally by the presidential nominees. However, they cover different time periods. Whilst H&K includes selections from 1940 to 2004, JB spans from 1960 to 2008. This thesis will take an inclusive approach: In order to maximize the number of observations, the dataset covers all selections made by the presidential candidates from 1940 to 2008. After excluding the two instances where the presidential nominee did not make the selection themselves (the 1940 Republican selection and the Democratic selection of 1956) and the seven occasions where the incumbent vice president have sought re-elections, the dataset covers a total of 27 vice presidential selections.

### 5.2 UNITS OF OBSERVATION

Identifying the persons that were seriously considered for the vice presidency is a complicated affair. There is no official source for this kind of information. One must rely mainly on secondary sources, in particular the media's coverage of the "veepstakes". Yet, the trustworthiness of such media reports must be problematized. Though some presidential nominees have conducted rather public searches for running mates (specifically Carter in 1976, Mondale in 1984 and Dukakis in 1988), the norm has rather been for presidential nominees to keep their vetting processes secretive affairs (Purdum 2004). Obviously, that has rendered political commentators to present more or less unfounded speculations, causing a

multitude of names to be floated as potential vice presidential candidates (Sigelman and Wahlbeck 1997).

The difficulty of determining the identity of the vice presidential finalists is reflected in the two datasets. There is an obvious divergence between them: They have not included the same units of observation in each selection pool. Focusing only on the time period that the two datasets are overlapping (1960 to 2004), there are twenty-three units of observations that are included only in one of the datasets. This complicates the task of combining the datasets, as these twenty-three “critical cases” require particular scrutiny.

### 5.2.1 “Critical cases” 1940-1992

For the selections up to 1992, both datasets H&K and JB have relied on the same primary source of information: The list of potential vice presidential candidates that was firstly compiled by Goldstein (1982) and later updated by Sigelman and Wahlbeck (1997), ranging from 1940 to 1992. However, there are notable discrepancies between the datasets. H&K has adapted Sigelman and Wahlbeck’s list without exceptions, whereas JB has made modifications. Four finalists that were on the original list are excluded, whereas another six finalists are added in the JB dataset.

The table below gives an overview of the “critical cases” of the dataset from 1960 to 1992, sorted in chronological order. It shows in which of the H&K datasets the finalist was included (and excluded) and finally whether or not the finalist was incorporated as part of the dataset in the thesis.

Table 5.1 The “critical cases” 1960-1992.

Units of observation		Dataset	Dataset	The thesis’
<i>Year(Party)</i>	<i>Finalist</i>	H&K	JB	Dataset
1964 (R)	Rockefeller, Nelson		X	
1968(D)	Rockefeller, Nelson	X		X
1968(D)	Alioto, Joseph D.		X	X
1968(D)	Kennedy, Edward		X	
1968(R)	Bush, George H. W.		X	X
1976(D)	Muskie, Edmund	X		X
1980(R)	Ford, Gerald	X		X
1988(R)	Dole, Robert	X		X
1992(D)	Cuomo, Mario		X	X
1992(D)	Gephardt, Richard		X	

The table shows that the four finalists that are omitted from dataset JB, but included in H&K, are the following: Nelson Rockefeller in 1968, Edmund Muskie in 1976, Robert Dole in 1988 and Gerald Ford in 1980. This thesis follows the strategy of H&K, and includes all these units of observation in the final dataset, for the following reasons.

Firstly, Nelson Rockefeller was excluded from the Democratic selection pool in 1968 in the JB dataset because of his affiliation with the Republican Party: "...there has been no cases of a presidential candidate selecting a running mate from the opposing party since the Civil War" (Baumgartner 2008: 770)<sup>28</sup>. Though this is undoubtedly true, there is, however, a different way of assessing this issue. One can argue that the historical absence of bipartisan tickets does not necessarily entail that politicians from the opposing parties have never been considered as running mates by the presidential candidates. As a matter of fact, there are indications of the opposite. The most recent example is the Republican selection pool of 2008. According to Baumgartner's own research (2008: 770), Democrat Joe Lieberman was on John McCain's final shortlist. Thus, the thesis will include Rockefeller in the 1968 Democratic vice presidential selection, despite his association with the Republican Party.

Secondly, in the case of Muskie, Dole and Ford, the argument for their exclusion from JB is based on their political backgrounds. Muskie and Dole had previously run for vice president and Ford had even served as president. The claim is that they would have smaller chances of being selected. However, these are subjective judgments that contradict contemporary accounts of the selections (Natoli 1980a; Ions 1977; Light 1984). Also, it runs counter to parts of this thesis' theoretical framework. The theory on changed dynamics postulates that such political experience would in fact be considered a highly beneficial asset by the presidential nominees. Their political background will therefore not be reckoned as adequate reasons for excluding them from the analysis in this thesis<sup>29</sup>.

The JB dataset also comprises six finalists that are neither included in H&K, nor the lists compiled by Goldstein (1982) and Sigelman and Wahlbeck (1997). Specifically, these are Nelson Rockefeller in the Republican pool of 1964, Joseph D. Alioto and Edward Kennedy in

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<sup>28</sup> Baumgartner has in his previous work (2006: 66) listed Rockefeller as one of the candidates that were considered for the Democratic vice presidency both in 1968 and also in 1964 (though this is not repeated in the article from 2008).

<sup>29</sup> Ford had only served one term as president, and his selection could therefore not be seen as a violation of the 22<sup>nd</sup> Amendment of the Constitution. Had Ford, on the other hand, served two terms, it would probably give rise to legal objections, though experts in constitutional law disagree on the subject (Baker 2006).



the Democrat pool of 1968, George H. W. Bush in the Republican pool of 1968 and finally Mario Cuomo and Richard A. Gephardt in the Democratic pool of 1992. After consulting various scholarly and academic sources, as well as an intensive search in various news reports that were published around the time of the announcements of the vice presidential nominees, the thesis includes three of these units of observations, Alioto, Bush and Cuomo, in the final dataset.

Rockefeller is not included as a Republican vice presidential finalist in 1964 due to his publicly declared feud with the Republican presidential candidate Barry Goldwater. Rivalling Goldwater for the presidential nomination, Rockefeller repeatedly denounced Goldwater as an extremist in the media. After the nomination, Rockefeller refused to endorse Goldwater's candidacy and did not participate in his campaign (Converse et al. 1965: 326). Thus, it is considered unlikely that Goldwater seriously considered him as a running mate.

When it comes to the vice presidential selections of 1968, sources lists both Alioto and Bush as being on the final shortlists for their respective parties (White 1969; Roberts 1968). Thus, they will be added to the thesis' dataset. Democrat Ted Kennedy, on the other hand, is not included. Early in the campaign, he had taken himself out of the running for the vice presidential nomination by publicly declaring that he would not accept the position if it was offered to him (Wickers 1968).

The Democratic vice presidential selection in 1992 was a particularly secretive process. Thus, there were extensive unconfirmed speculations in the media on the subject of Bill Clinton's running mate. Both Cuomo and Gephardt were therefore brought up in news reports as vice presidential potentials (Ifill 1992b). However, there is an observable difference in the media coverage of these two politicians. Despite rumors of his disinterest in the position, Cuomo is more frequently referred to as a serious contender, and often with reference to "sources within the Clinton campaign" (Ifill 1992a; Toner 1992; Sack 2008). Also, in Ceaser and Busch's account of the Clinton campaign (1993: 70), Cuomo is mentioned as a likely vice presidential finalist (albeit with the reservation that he was "probably less seriously considered"), whereas Gephardt was not. Therefore, only Cuomo is included in the thesis' data on the 1992 selection pool.

To sum up, out of the ten “critical cases” in the vice presidential selections from 1960 and 1992, seven are finally included in the thesis’ dataset. The thesis’ dataset comprises all four finalists that were omitted from JB, but present in H&K. Also, it included three units of observations that were present in JB, but not in H&K.

### 5.2.2 “Critical cases” 1996-2008

For the selections of 1996 through 2004, the two datasets have been compiled independently, not relying on any existing literary work. In this period, there are twelve units of observations that are diverging between the datasets. However, the divergence reveals a clear pattern: JB has consistently added more finalists to each of the four selection pools between 1996 and 2004. Only in the 2004 Democratic selection pool has H&K included a finalist that was excluded from the JB dataset.

The table below gives an overview of the critical cases from 1992 to 2004.

Table 5.2 The “critical cases” 1992-2004.

Units of observation		H&K	JB	The thesis’ Dataset
<i>Year(Party)</i>	<i>Finalist</i>			
1996 (R)	John McCain		X	X
1996 (R)	Don Nickles		X	X
1996 (R)	Tommy Thompson		X	X
1996 (R)	Connie Mack		X	X
2000 (D)	Jeanne Shaheen		X	X
2000 (D)	Richard Gephardt		X	X
2000 (R)	Bill Frist		X	X
2000 (R)	George Pataki		X	X
2000 (R)	Tom Ridge		X	X
2000 (R)	Fred Thompson		X	X
2004 (D)	Jeanne Shaheen		X	X
2004 (D)	John McCain	X		X

When deciding on whether to exclude or include these twelve cases in the thesis’ dataset, it was considered imperative to look at the specification of the criteria that has been used in the identification of the vice presidential finalists. Only Baumgartner specifies these selection criteria explicitly. When updating his dataset to include the selections of 1996 to 2008, he firstly consulted various scholarly and journalistic sources. Secondly, he cross-checked the resultant list with news articles that were published within the last week prior to the

announcement of the running mate and included references both to the shortlist and campaign sources (Baumgartner 2008:766).

The thesis follows Baumgartner's selection criteria. Thus, after verifying that the twelve finalists "critical cases" that are included in JB, actually have met these criteria, they are all added to the thesis dataset. The argument is that the thoroughness of Baumgartner's case selection process reduces the likelihood of including candidates in the datasets that were never really considered (type 1 errors). Also, that the reliance on newspaper reports is limited to the final week before the announcement helps to ensure that politicians that were vetted, but rejected earlier in the process, would be eliminated.

The only modification that is made to Baumgartner's list of vice presidential finalists from 1996-2008 is in the 2004 Democratic pool. The JB dataset does not include Republican John McCain as a finalist, for the same reason that Republican Nelson Rockefeller was excluded from JB's Democratic pool of 1968. Thus, adhering to the arguments that affiliation with the opposing party does not necessarily prohibit a presidential nominee from considering a vice presidential candidate, the thesis follows the example of H&K and includes McCain in the 2004 Democratic selection pool. As such, all the "critical cases" in the selection pools of 1992-2004 are added to the thesis' dataset.

### ***5.2.3 Influential cases?***

In total, the thesis' dataset includes nineteen of the twenty-two "critical cases" in the selection pools from 1960 to 2004. However, when selecting such a strategy, attention should be paid to the potential impact it may have in the analysis. In his article, Baumgartner (2008: 770) reports that at least two of the units of observations that were excluded from JB, namely Ford in 1980 and McCain in 2004, "unfairly skewed the analysis inasmuch as they were predicted as the first choice for the nomination". Notably, this thesis' analysis will not be presented with the exact same problem. Since both Ford and McCain are coded as the first choice for the nominations in 1980 and 2004 (see section 5.3 below for an explanation of the dependent variable), any prediction of them as the winners of the selection pools would be welcome. The same goes for another one of the "critical cases", Nelson Rockefeller in 1968.

Nevertheless, Baumgartner's observation of skewness directs the attention to the possibility of the remaining sixteen "critical cases" being outliers that might influence the analysis.

However, an examination of the Delta-Beta values of these units of observations warrants no such concerns. The Delta-Beta statistic is the recommended indicator of the influence of residuals (Long and Freese 2006: 151), measuring the difference in the coefficient vector that is caused by the deletion of a unit of observation (Pregibon 1981). As such, it is the logistic analog to Cook’s distance in linear regression: The higher Delta-Beta value an observation has, the more does it influence the results of the analysis. None of the sixteen units of observation in question showed elevated Delta-Beta values (for a complete table, see Appendix)<sup>30</sup>. Hence, there should be no statistical objections to including them in the thesis’ dataset.

#### 5.2.4 *The complete list*

To sum up, the thesis takes the following strategy when combining the two datasets:

Table 5.3 Combination of datasets H&K and JB.

<b>Selection pools</b>	<b>Primary source</b>	<b>Additions</b>	<b>Number of finalists</b>
<b>1940-1960</b>	H&K	None	33
<b>1960-1992</b>	H&K	+ 3 from JB	96
<b>1996-2004</b>	JB	+ 1 from H&K	29
<b>2008</b>	JB	None	10
<b>Total</b>			<b>168</b>

H&K is adopted for the period of 1940 to 1960. For the selections of 1960 through 1992, H&K is used, with the exception of three units of observation that are added from JB. For the selections of 1996 through 2004, the thesis adapts JB, but one case is added from dataset H&K. Lastly, for the two selection pools of 2008, JB is the only dataset that includes this selection.

The resultant list includes 168 units of observation, grouped in selection pools ranging from 1940 to 2008. In this period, there were eighteen general elections and thus 36 vice presidential selections, but nine of these selections were decided without competition. Thus, the final number of selection pools is 27. The complete list is presented in table 5.4 below.

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<sup>30</sup> Neither did the four “critical cases” that were not included in the thesis’ dataset. Their omission from the dataset is based purely on empirical reasons.

Table 5.4 The Finalist Pool, 1940-2008

	Democratic party		Republican party			Democratic party		Republican party		
<b>1940</b>	Hull <sup>a</sup> Wallace <sup>b</sup> Barkley	Byrnes Douglas	<i>McNary</i>		<b>1976</b>	Mondale <sup>ab</sup> Muskie Church Glenn	Rodino Stevenson Jackson	Dole <sup>ab</sup> Armstrong Baker Ruckleshaus		
<b>1944</b>	Truman <sup>ab</sup> Barkley Byrnes Douglas Wallace		Warren <sup>a</sup> Bricker <sup>b</sup>		<b>1980</b>	<i>Mondale</i>		Ford <sup>a</sup> Bush <sup>b</sup> Baker Kemp Laxalt		Lugar Rumsfeld Simon Van der Jagt
<b>1948</b>	Douglas <sup>a</sup> Barkley <sup>b</sup>		Warren <sup>ab</sup> Bricker Halleck Stassen		<b>1984</b>	Ferraro <sup>ab</sup> Bentsen Bradley Bumpers Cisneros Collins	Cuomo Dukakis Feinstein Glenn Goode	<i>Bush</i>		
<b>1952</b>	Sparkman <sup>ab</sup> Chapman Kefauver Monroney Magnuson	Russell Barkley Kerr Fulbright	Nixon <sup>ab</sup> Halleck Judd Knowland Langlie	Thornton	<b>1988</b>	Bentsen <sup>ab</sup> Gephardt Glenn	Gore Graham Hamilton	Quayle <sup>ab</sup> Alexander Deukmejian Domenici	Dole Simpson Thompson	
<b>1956</b>	<i>Kefauver</i>		<i>Nixon</i>		<b>1992</b>	Gore <sup>ab</sup> Cuomo Graham	Kerrey Rockefeller Wofford	<i>Quayle</i>		
<b>1960</b>	Johnson <sup>ab</sup> Freeman Humphrey Jackson	Symington	Rockefeller <sup>a</sup> Lodge <sup>b</sup> Anderson Judd Mitchell	Thuston Seaton Ford	<b>1996</b>	<i>Gore</i>		Kemp <sup>ab</sup> Campbell Edgar Engler	Mack McCain Nickles Thompson	
<b>1964</b>	Humphrey <sup>ab</sup> Kennedy, R. Mansfield McCarthy McNamara	Shiver	Miller <sup>ab</sup> Ford Scranton		<b>2000</b>	Lieberman <sup>ab</sup> Bayh Edwards Gephardt	Kerry Shaheen	Cheney <sup>ab</sup> Danforth Frist Hagel Kasich	Keating Pataki Ridge Thompson	
<b>1968</b>	Rockefeller <sup>a</sup> Muskie <sup>b</sup> Harris Hughes	Sanford Shiver Alioto	Finch <sup>a</sup> Agnew <sup>b</sup> Baker Bush	Rogers Volpe	<b>2004</b>	McCain <sup>a</sup> Edwards <sup>b</sup> Gephardt	Graham Shaheen Vilsack	<i>Cheney</i>		
<b>1972</b>	Kennedy <sup>a</sup> Eagleton <sup>b</sup> Askew Church Mondale	Nelson O'Brien Ribicoff Shiver White	<i>Agnew</i>		<b>2008</b>	Biden <sup>ab</sup> Bayh Kaine	Sebelius Edwards	Palin <sup>ab</sup> Pawlenty Ridge Romney	Lieberman	

The two vice presidents that were either chosen by party delegates and the seven incumbents that were left on their tickets are listed in italics, but excluded from the analysis.

<sup>a</sup>The presidential nominee's first choice for running mate.

<sup>b</sup>Actual nominee.

### 5.3 THE DEPENDENT VARIABLE: FIRST-CHOICE

As discussed in chapter three, the three theories differ when it comes to the operationalizations of the dependent variable. That renders the thesis with two possible ways of coding the dependent variable: Whether the finalists were actually nominated or not, or whether the finalists were firstly offered the nomination or not. Of course, the latter option is the most demanding in terms of documentation. To determine which candidates that were the

presidential nominees' first choices, one must again rely on secondary, unofficial sources (that might convey both rumors and unfounded speculation). Nevertheless, the first-choice approach is the most theoretically salient. The thesis' objective is to learn of the presidential nominees' preferences for his running mate. Whether or not the chosen candidate in fact accepted the nomination should therefore be irrelevant. Thus, the candidates that were firstly asked by the presidential nominees are coded 1 and all other finalists are coded 0<sup>31</sup>.

According to Hiller and Kriner (2008), the first-choice candidate differs from the actual nominee on nine occasions. These were in the Democratic selections of 1940, 1948, 1968, 1972 and 2004, and the Republican selections of 1944, 1960, 1968 and 1980. The thesis' search for information upheld the validity of that list. However, some of these cases are established with more certainty than others. An example is the 1940 selection of the Democratic vice president: There is an overall concurrence in the literature that Cordell Hull was repeatedly asked by Franklin D. Roosevelt to join the ticket in 1940 (Williams 1956:177-178; Goldstein 1982). In comparison, when it comes to the designation of John McCain as Kerry's first choice in 2004, there exists no such agreement. Instead, that judgment was based on a review of various news reports (including an interview with McCain himself) claiming that there had been an offer from Kerry (Fournier 2004; Bumiller 2008; Halbfinger 2004; Hiller and Kriner 2008).

#### **5.4 INDEPENDENT VARIABLES**

The coding of the variables in the thesis' dataset stems for the most part from the two datasets H&K and JB. Still, as the thesis' dataset is a combination of the two, there were a few observations of missing values. These missing values were filled in by turning to the same sources that are cited by Baumgartner (2008) and Hiller and Kriner (2008). These sources include both the empirical studies conducted by Sigelman and Wahlbeck (1997), descriptive works on the vice presidency (Goldstein 1982; Williams 1956), various encyclopedias and lexical sources (e. g. Congress 2008: The Biographical Directory of the United States

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<sup>31</sup> There is an unavoidable possibility that the presidential nominee's true favourite is not the same as the firstly asked candidate. For example, one could hypothesize that Bob Dole would have asked Colin Powell in 1996 if Powell had not made it absolutely clear that he would not accept such a bid. However, for the sake of a statistical analysis, it would be almost impossible to determine the true favourite of the presidential nominees. Also, it would be beside the point, as the goal is not to model hypothetical vice presidential selections, but rather the selections that were actually made.

Congress), and accounts of the various presidential campaigns (e. g. Polsby et al. 2008; Pomper 2001, 1997; Ceaser and Busch 2001, 1997, 2005; Wayne 2001).

In total, there are twenty-one independent variables that will be included in the analysis. The presentations of these are grouped according to their theoretical affiliation.

#### 5.4.1 Ticket-balancing theory - traditional variables

Table 5.5 gives an overview of the variables pertaining to the ticket-balancing theory.

Table 5.5 Variables of ticket-balancing theory

Variable	Operationalization	
<b>Regional balance</b>	Dummy	1=Coming from different region than presidential nominee
<b>Religious balance</b>	Dummy	1=Different religious affiliation than presidential nominee
<b>Ideological balance</b>	Dummy	1=Different ideological position than presidential nominee
<b>Demographic balance</b>	Dummy	1=Different gender or race than presidential nominee
<b>Age balance</b>	Dummy	1= < 10 years between finalist and presidential nominee
<b>Insider-outside balance</b>	Dummy	1=Finalist/pres. nom with no political experience from Washington
<b>Size of state</b>	Scale	Percent of state's electoral votes of national total
<b>Current rival</b>	Dummy	1=Rivalry for presidency in election cycle in question

As seen in the table, all the six variables that measure a form of balanced ticket are coded as dummy variables. The value 1 denotes balance, whilst 0 obviously denotes non-balance.

For the three variables measuring balance of geography, religion and ideology, the coding is based on a classification of categories. *Regional balance* is divided in five categories: Border, Northern, Southern, Midwestern and Western<sup>32</sup>. *Religious balance* is constituted of four categories: Protestant, Roman Catholic, Jewish or Greek Orthodox. *Ideological balance* is based on a three-fold classification: Liberal, Moderate and Conservative. For these variables,

<sup>32</sup> Though the US Census of 2007 groups the states in four categories, the thesis follows Siegelman and Wahlbeck (1997) and Hiller and Kriner (2008: 412) in designating *Border states* as a separate category. The precise categorization of the regions are as follows: *Border*: DE, KY, MD, MO, WV; *North*: CT, MA, ME, NH, NJ, NY, PA; *South*: AL, AR, FL, GA, LA, MS, NC, OK, SC, TN, TX, VA; *Midwest*: IA, IL, IN, KS, MI, MN, NE, ND, OH, SD, WI; *West*: AK, AZ, CA, CO, MT, NM, OR, UT, WY, WA. In turn, this coding deviates from that of Baumgartner (2008), who included *Pacific* as a sixth region.

The coding of *demographic balance* takes both gender and race/ethnicity into account. If the vice presidential finalists and the presidential nominee are white (non-Hispanic) males, this variable is coded 0. In the cases where either (but not both) of these candidates lacks one of these characteristics, they are coded 1. This entails that in the cases where the presidential nominee and the vice presidential finalists are both of different genders and racial background (such as for example Barack Obama and Kathleen Sebelius in 2008), the finalist is assigned the value 0.

*Age balance* is coded 1 if the vice presidential finalist is more than ten years younger (or older) than the presidential nominee. Balance of political experience is referred to as *insider-outsider balance*. An outsider is defined as a person that has never served in Congress nor ever held an important government position in Washington prior to the year in question. Tickets comprised of only one such outsider are coded 1.

*Size of state* captures the number of electoral votes that each finalist's home state possesses as a percentage of the national total in each election year. The higher value a finalist scores on this variable, the more electoral votes does his/her home state have.

Presidential rivalry is measured through a dummy variable, labeled *current rival*. It is coded 1 if the vice presidential finalist was a candidate for the presidential nomination of the year in question and therefore rivaled the presidential nominee. Notably, in measuring presidential rivalry, Siegelman and Wahlbeck (1997: 857) also included a variable measuring rivalry in previous election cycles. However, this thesis will not follow their example, as the inclusion of such a variable would pose a two-fold problem. First, a *previous rival* variable correlates strongly with *current rival*, and a model that included both would thus have been flawed with multicollinearity<sup>33</sup>. Second, the variable is not a part of the theoretical framework. The core of the ticket-balancing theory is that the presidential nominee looks to his competitors in the election cycle *in question*, and not in previous elections. Considering that the point of the statistical modeling in this thesis is to investigate the explanatory effect of the ticket-balancing theory, the inclusion of a variable that is not part of the theory (and can be questioned in terms of producing reliable results) seems pointless.

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<sup>33</sup> The variables would correlate at .8 and both have relatively low tolerance values when included in the same model (.22 and .23),



### 5.4.2 *The theory of increased complexity- modern variables*

An overview of the modern variables adhering to the theory of increased complexity is presented below.

Table 5.6 Modern variables of the theory of increased complexity

Variable	Operationalization	
<i>State competitiveness</i>	<i>Scale</i>	<i>Average party difference in state's 3 previous elections</i>
<i>Ambition</i>	<i>Dummy</i>	<i>1= Competed for presidency/considered for VP in previous elections</i>
<i>Media exposure</i>	<i>Scale</i>	<i>Standardized measure, number of newspaper articles about finalist from January 1st previous year to June 30th election year</i>
<i>Political experience</i>	<i>Scale</i>	<i>Log of finalist's prior years of public service</i>
<i>Education</i>	<i>Dummy</i>	<i>1=Post-graduate education</i>
<i>Age</i>	<i>Scale</i>	<i>Finalist's age</i>
<i>Military service</i>	<i>Dummy</i>	<i>1=Military service</i>

VP=vice presidency

The first of the variables, *state competitiveness*, is measured by looking to the three previous general elections that were held in the state. The difference between the percentage of votes for the Democratic Party and the Republican Party were recorded for all three years, and averaged. Thus, a smaller value would be indicative of a competitive state.

The *ambition* variable measures whether or not the finalist has ever sought the presidency or been considered for the vice presidency in any previous election (not counting the election in question). If so, the dummy variable is coded 1. Notably, this *ambition* variable can be seen as an expanded version of the above-mentioned variable included in Siegelman and Wahlbeck (1997), measuring rivalry in previous election cycles. Yet, the objections against the previous rival variable were that it caused high collinearity in a model that also included the *current rival* and fell beyond the scope of the theory, and neither of these objections applies to the ambition variable.

The *media exposure* variable is measured by searching the online archives of the New York Times ([www.nytimes.com](http://www.nytimes.com)) and Time Magazine ([www.time.com](http://www.time.com)) for the finalists' full names. The number of articles that were published by each newspaper from January 1st of the previous year through June 30th of the election year and that included a reference to the

finalists' name was then recorded. However, the number of published articles varied greatly between the different finalists. Therefore, the two scores (for each newspaper) were standardized, before adding them to create an index of media exposure.

For the variable measuring *political experience*, the focus is on the finalists' political résumé. All previous public and government posts are recorded, including elected and appointed offices at the national, state and local levels. The years that the finalist spent in each of these positions are thereafter added. Yet, the number of years of political experience is expected to have a nonlinear effect. The difference between a finalist that has spent 10 years in political service and another that has a mere 5 years of experience is assumed to be greater than between finalists with 25 and 20 years experience. To account for that nonlinearity, the *political experience* variable takes the natural log of each finalist's prior years of public service.

The coding of the final three of the modern variables is relatively clear-cut. First, *education* is a dummy variable constructed to capture the difference between highly educated finalists and finalists with a "normal" level of education. 0 denotes that the finalist had no more than a four-year college degree, whilst 1 means that the candidate completed a post-graduate education of some sort. Second, *military service* is a dummy variable where the finalist is coded 1 if he/she had served in the military<sup>34</sup>. Lastly, youth is measured indirectly, by recording the finalist's age at the time of the election. Thus, the variable is labeled *age*.

### 5.4.3 Variables of the "theory of changed dynamics"

The core of the theory of changed dynamics is that the key independent variables would have different effects before and after 1976/1972. Therefore, the model will use the three variables *political experience*, *size of state* and *regional balance* that are defined above. These will be recoded into six variables: Each variable is split into a pre-1976 variable and a post-1972 variable.

Thus, *political experience* is coded into a *pre-1976 experience* variable and a *post-1972 experience* variable. For the *pre-1976 experience* variable, all finalists in selection pools after

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<sup>34</sup>In 1973, the United States converted from a military draft to an all-volunteer military (Segal 1989). It can therefore be expected that vice presidential candidates before 1973 would have a higher probability of having served in the military. However, this will not be controlled for in the analysis.

1972 are given the value 0. Conversely, for the *post-1972 experience* variable all finalists in selection pools before 1976 are coded 0. Thus, the variables will only measure the effect of political experience in one of these two time periods.

The *size of state* and *regional balance* variables are recoded the same way: Each of the variables is split into two time-demarcated variables. An overview of the operationalizations of the variables is presented in the table below.

Table 5.7 Variables of the theory of changed dynamics

Variables		Operationalizations
<b>Political experience pre-1976</b>	Scale	Log of finalist's prior years of public service Units of observation after 1972=0
<b>Political experience post-1972</b>	Scale	Log of finalist's prior years of public service Units of observation before 1976=0
<b>Size of state pre-1976</b>	Scale	Percent of state's electoral votes of national total Units of observation after 1972=0
<b>Size of state post-1972</b>	Scale	Percent of state's electoral votes of national total Units of observation before 1976=0
<b>Regional balance pre-1976</b>	Dummy	1=Different regional belonging than presidential nominee Units of observation after 1972=0
<b>Regional balance post-1972</b>	Dummy	1=Different regional belonging than presidential nominee Units of observation before 1976=0

Notably, the two variables measuring *political experience* (*pre-1976* and *post-1972*) correlate negatively (at -.8), and their tolerance levels when included in the same regression model are also relatively low (both at .2). This is understandable when taking into account that they measure the same phenomenon, only in different time periods. Yet, it might pose a problem for the statistical analysis, as high collinearity might make it difficult to determine the individual effect of the variables. However, this will be controlled for in the analysis. The model where these variables are both included will be replicated twice, the first time excluding the *pre-1976* variable and the last time excluding the *post-1972* variable. If there is no significant change in the variables' effects between the models, the assumption is that the results are reliable.

The other time-demarcated variables measuring regional balance and size of state do not correlate to the same extent, and will thus not be subject to the same level of scrutiny in the analysis.

## 6 ANALYSES

This chapter presents the thesis' analyses. Firstly, some descriptive statistics of the variables are presented. This includes an overview of the range and distribution of all variables, as well as an exploration of the independent variables' levels of within-group variance. Thereafter, the three theories of vice presidential selection are tested separately in three different conditional logistic regression models, labeled models 1, 2 and 3. These models are evaluated individually and comparatively, both in terms of overall model fit and the performance of the individual variables. Special emphasis is put on whether or not the variables' effects comply with the expectations in hypotheses H1-H18<sup>35</sup>. Lastly, a new synthesis model, combining the vital explanatory elements of the former models, is constructed. That is done in two steps: First, a model 4 includes variables that were found in the former three models to significantly influence the selection of vice presidents. Second, model 5 excludes the variables that were inefficient in model 4. This final model thus provides a parsimonious and coherent explanation of the vice presidential selections.

### 6.1 DESCRIPTIVE STATISTICS – RANGE AND DISTRIBUTION

The table below presents the mean, standard deviation, minimum and maximum value for both the dependent variable and the twenty-one independent variables, the latter organized according to their theoretical affiliation.

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<sup>35</sup> See chapter 3, section 3.4.3, for tabulation of the hypotheses.

Table 6.1 Descriptive statistics of the independent variables

	Variable	Mean	Standard deviation	Minimum value	Maximum value
<b>Dependent variable</b>	Vice presidential selection	.16	.36	0	1
<b>Ticket-balancing theory</b>	Regional balance	.86	.34	0	1
	Religious balance	.36	.48	0	1
	Ideological balance	.48	.5	0	1
	Demographic balance	.08	.28	0	1
	Age balance	.39	.49	0	1
	Insider-outside balance	.48	.5	0	1
	Size of state	2.99	1.95	.55	8.74
	Current rival	.14	.34	0	1
<b>Theory of increased complexity</b>	State competitiveness	12.12	12.95	0	95
	Ambition	.41	.5	0	1
	Media exposure	1.71	1.33	-.98	5.18
	Political experience	2.66	.66	0	3.85
	Education	.79	.41	0	1
	Age	53.40	7.76	32	76
	Military service	.51	.50	0	1
<b>Theory of changed dynamics</b>	Political experience pre-1976	1.19	1.37	0	3.85
	Political experience post-1972	1.47	1.45	0	3.64
	Size of state pre-1976	1.34	1.90	0	8.37
	Size of state post-1972	1.65	2.15	0	8.74
	Regional balance pre-1976	.42	.49	0	1
	Regional balance post-1972	.44	.5	0	1

N=168, no missing values

### 6.1.1 *Dependent variable*

For binary variables, the mean and the standard deviation do not have the same meaning as for continuum-based variables. However, the mean of a dummy variable gives information about the proportion of units that are assigned the value 1 (Midtbø 2007: 44). For the dependent variable of this application, *vice presidential selection*, that means that 16% of the finalists were the first choices for the position of vice president.

### 6.1.2 *The ticket-balancing theory*

Like the dependent variable, all but one of the independent variables linked to the ticket-balancing theory are dummy variables. The means of *ideological balance*, *religious balance*, *age balance* and *insider-outsider balance* all indicate a fairly even distribution between the non-balanced and balanced tickets. In contrast, the units of *regional balance*, *demographic balance* and *current rival* are not so evenly distributed. These variables' means show that whilst an entire 86% of the vice presidential finalist are from a different geographical region than the presidential nominee, just 8% of the finalist are of a different race or gender than the nominee and only 14% of the finalists challenged the presidential candidate for nomination.

The only metric variable in the ticket-balancing theory is the *size of state* variable. Its minimum value is .55. This percentage score corresponds to states that have 3 electoral votes out of the national total of 538 (like for example Sarah Palin's Alaska in 2008). The maximum value is 8.74, corresponding to California's 47 votes in 1988.

### **6.1.3 The theory of increased complexity**

There are three dummy variables pertaining to this theory. First, the mean of *ambition* indicate that 41% of the finalists have competed for the vice presidency or the presidency in previous election cycles. Second, the mean of *military service* signifies that 51% of the finalists have served in the military. Last, the mean of *education* shows that 79% of the finalists have higher education of more than four years.

In terms of variable range, *state competitiveness* must be commented upon. The maximum value is remarkably high and represents extreme circumstances: The Democratic finalist James F. Byrnes from South Carolina scored 95 on the variable in 1944. That is explained by the extreme Democratic support in South Carolina in the three preceding state elections: Theodore Roosevelt won by 96 %, 97 % and 91 %. Obviously, such election results can hardly be considered the norm. The variable's mean of 12.12 and standard deviation of 12.95 signifies that Byrnes in 1944 is an exception, and that most finalists score considerably closer to the minimum value of 0 than to the maximum value of 95.

*Political experience* also has a skewed distribution. It ranges from a minimum value of 0 to a maximum value of 3.85. Thus, the mean of 2.66 and the standard deviation of .66 show that the majority of the finalist are assigned values at the higher end of the scale. Still, this is perhaps not surprising considering the non-linear coding of the variable, taking the log of the finalists' years in public office.

*Media exposure* is a standardized measure and its values are not intuitively translatable into precise quantities (i.e. number of newspaper articles). Consequently, the variable's range from -.98 to 5.18 are vital in providing a reference frame for the interpretation of the variable. First, it provides a clue of the substantive meaning of the variable's values. Take Sarah Palin's score of -.94 as an example: Though not being indicative of the accurate number of articles written about her, it shows that she is one of the finalists in the dataset that had the lowest level of media coverage (prior to her nomination).

Second, since the odds ratio (which will be discussed in the upcoming analysis) is based upon the notion of a *unit increase* in a variable, it helps to have an understanding of the distance between the units. Seeing as media exposure ranges from almost -1 to just above 5, one can fruitfully think of the variable as a six-point scale. Following that simplification, the difference between Joe Biden and Sarah Palin can be illustrative of a unit increase, since Biden had a score of about 0 and Palin had a score of nearly -1. However, in real terms, the difference between the two is not necessarily great. It is mainly caused by the fact that Time Magazine wrote one article on Biden, whilst none on Palin, in the period from January 1<sup>st</sup> 2007 to June 30<sup>th</sup> 2008. Thus, the distance between the units on the variable can be considered relatively small.

Last among the variables linked to this theory is *age*. This variable's minimum value reveals that the youngest finalist (Robert Kennedy in the Democratic pool of 1964) was 32 years old when he was considered for vice president<sup>36</sup>. The maximum value, on the other hand, indicates that the oldest finalist was 76 years old (Alben Barkley in the 1956 Democratic pool). The average age of the finalists is 53.4 and the standard deviation of 7.76 furthermore shows that most of the finalists were in the ages between 46 and 62.

#### **6.1.4 Theory of changed dynamics**

All the variables that are comprised in the theory of changed dynamics are marked by the division between the period before 1976 and after 1972. That the variables are coded 0 on either side of this demarcation line is reflected in the mean and standard deviation of all the variables. Take the two dummy variables *regional balance pre-1976* and *regional balance post-1972* as an illustration: The original dummy variable *regional balance* consisted almost exclusively of 1's, whilst the means of the two modified variables are both close to .5. The same can be seen for the remaining four metric variables: The ranges of the modified variables *size of state pre-1976/size of state post-1972* and *political experience pre-1976/political experience post-1972* are pretty close to the ranges of the original variables *size of state* and *political experience*, but the means of the modified variables are obviously considerably lower than the means of the original variables.

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<sup>36</sup> It should be mentioned that Robert Kennedy's age of 32 would probably have been an issue if he was selected: According to Article II in the Constitution, the president must be at least 35 years. If he was vice president, Kennedy would thus have been effectively prevented from succeeding take the presidency.



## 6.2 DESCRIPTIVE EXPLORATION OF WITHIN-GROUP VARIANCE

As noted in the methods chapter, conditional logistic regression has a specific requirement for the distribution of the independent variables: They should have variance within the selection pools, as little within-group variance would potentially yield biased results. Consequently, a descriptive exploration of the independent variables' distribution within the selection pools is imperative.

To begin with, nine of the variables are metric<sup>37</sup>. One should thus reasonably expect these variables to vary within the selection pools, more so than the dummy variables. A quick glance at the dataset confirms that expectation: There is considerable variance in nearly all selection pools<sup>38</sup>. In contrast, the dummy variables warrant greater scrutiny. Table 6.2 gives an overview of the variance within the selection pools for each variable. Also, it provides information of the values of these non-variant selection pools.

Table 6.2 Within-group variance for the dummy variables

	Pools without variance	Total number of pools	Percentage of pools without variance	Values of the non-variant selection pools	
				Only 0	Only 1
<b>Regional balance</b>	13	27	48.1	13	-
<b>Religious balance</b>	9	27	33.3	2	7
<b>Ideological balance</b>	0	27	0	-	-
<b>Demographic balance</b>	21	27	77.8	21	-
<b>Age balance</b>	6	27	22.2	3	3
<b>Insider-outsider balance</b>	12	27	44.4	4	8
<b>Current rival</b>	12	27	44.4	-	12
<b>Ambition</b>	2	27	7.4	1	1
<b>Education</b>	9	27	33.3	-	9
<b>Military service</b>	6	27	22.2	3	3
<b>Regional balance pre-1976</b>	11	14	78.6	-	11
<b>Regional balance post-1972</b>	3	13	23.1	-	3

The table shows that two variables in particular that have alarmingly high percentages of selection pools without variance: *Demographic balance* and *regional balance pre-1976*.

Firstly, the *demographic balance* variable has constant values in 21 of 27 selection pools and all the units of observation in these selection pools are coded 0. In practice, that means that in almost 80 % of the vice presidential selections, candidates of a different gender or ethnicity

<sup>37</sup> The metric variables are the following: *Media exposure*, *state competitiveness*, *age*, the three variables measuring size of state (*size of state*, *size of state pre-1976* and *size of state post-1972*) and the three variables measuring political experience (*political experience*, *political experience pre-1976* and *political experience post-1972*).

<sup>38</sup> Excluding the selection pools that are deliberately set to 0 in the variables *size of state pre-1976*, *size of state post-1972*, *political experience pre-1976* and *political experience post-1972*.

than the presidential nominees were not even put on the shortlist. Such a systematic pattern inevitably tempts a conclusion that the lack of demographic balance in fact was desirable for the presidential nominees, that the presidential nominees have generally *not* wanted a running mate of a different gender or ethnic background. If that is the case, the real effect of the *demographic balance* variable is negative in 21 of the 27 selection pools. Since that will not be captured by a conditional logistic regression analysis, the variable may have an inherent positive bias.

Therefore, in order to include *demographic balance* in the analysis, the interpretation of the variable's estimated effect will be subject to reservations. Instead of claiming overall generalizability, there is rather the potential of making conditional inferences. To exemplify: If the *demographic balance* variable has a positive effect in the analysis, one cannot automatically conclude that male presidential nominees generally pick female running mates or running mates of a different race. Rather, the conclusion would be that *if* a male presidential nominee considers a woman seriously enough to include her on his shortlist, she has good chances of being chosen in that specific selection. As such, the ticket-balancing theory's expectation in hypothesis H4 (that demographic balance would have a positive effect on vice presidential selections) can only be conditionally supported in the upcoming analyses.

Secondly, *regional balance pre-1976* has a problematically low level of within-group variance. Only three of the fourteen selection pools between 1940 and 1972 have varying values. The distribution pattern is, however, the opposite of the *demographic balance* variable: The eleven non-variant selection pools solely contain units of observations that are coded 1 and thereby represent regionally balanced tickets. Following the logic discussed above, that implies that one cannot disregard the possibility that these vice presidential finalists were all selected *because* of their capacity to balance the ticket geographically. Potentially, the variable may have a negative bias: The conditional logistic analysis might not capture the true positive effect of the variable. Thus, by the same logic that was discussed for the *demographic balance* variable, the generalizability of the variable is drawn into question. However, the direction of the potential bias is the opposite of the *demographic balance* variable.

For the rest of the variables, the level of within-group variance is deemed acceptable. The conclusion is therefore that only the two variables measuring *demographic balance* and

*regional balance pre-1976* require particular attention when interpreting the results of the models below.

### 6.3 MODEL 1: THE TICKET-BALANCING THEORY

The ticket-balancing theory is the first to be tested in a conditional logistic regression model. There are eight hypotheses related to the theory, H1-H8. These hypotheses postulate that the six balancing variables, as well as the variables measuring size of state and presidential rivalry will have positive and significant effects on the vice presidential selections.

Table 6.3 Model 1: The ticket-balancing model

Characteristics of potential candidate or ticket	Logit coefficient	Standard error	P-value	Odds ratio
Regional balance	-.08	.72	.909	.92
Ideological balance	.02	.44	.960	1.02
Religious balance	-.51	.58	.374	.60
Demographic balance	.72	1.11	.515	2.06
Age balance	.49	.50	.325	1.64
Insider-outsider balance	-1.04	.68	.121	.35
Current rival	.64	.72	.343	.50
Size of state	.22	.12	.069*	1.24
<b>Model fit</b>				
Chi <sup>2</sup> (8)	8.23			
Prob > chi <sup>2</sup>	.411			
Adjusted McFaddens' R <sup>2</sup>	-0.082			
BIC	23.73			
Percentage of correct predictions	(12/27) 44.4%			
* p< .10 **p< .05 *** p< .01			All significance tests are two-tailed	
N= 168				

Table 6.1 demonstrates weak results for the ticket-balancing theory in model 1. First, a look at the variables' effects: Neither of the balancing variables nor the *current rival* variable have statistically significant effects. That statement holds even after excluding several of the variables randomly. No combination of variables makes any of the balancing variables have significant effects, not even the *insider-outsider balance* (which in model 1 has a p-value that is just above .10). Hence, there is little support for any of the hypotheses H1-H6, which postulated balanced tickets to have positive effect on the vice presidential selection. Also, hypothesis H7 is left unsupported by the analysis: Rivalry for the presidential nomination does not appear to increase the finalist's chances of becoming selected as vice president.

Only *size of state* performs in accordance with the theoretical expectations. The effect of this variable is significant, positive and substantive: The odds ratio shows that a unit increase in

the variable would increase the odds of selection by 1.24, all other variables held constant. Since the variable is the state's proportion of the national total electoral votes, the odds ratio means that if Sarah Palin had moved from Alaska (with three votes) to South Carolina (with eight votes), her odds of being selected in 2008 would have increased by 24 %. The analysis therefore finds support for hypothesis H8, expecting a positive effect of size of state.

Also, in terms of model fit, model 1 performs poorly. The likelihood ratio test (denoted  $\chi^2$ ) is statistically insignificant, meaning that the performance of the ticket-balancing model is no better than mere chance. Also, the *adjusted McFadden's  $R^2$*  is negative. Though this is a relative measure, a negative value should safely be interpreted as a poor fit. The model is clearly penalized for including too many inefficient predictors, i.e. variables without significant effects.

Lastly, model 1 only predicted 12 of the 27 selection pool winners, corresponding to a percentage of correctly predicted cases of 44.1 %. A tabulation of the hits and misses is presented below.

Table 6.4 Correctly predicted cases in model 1

Year	Selection pool winner	Correctly predicted
1940 (D)	Hull, Cordell	X
1944 (D)	Truman, Harry	
1944 (R)	Warren, Earl	X
1948 (D)	Douglas, William O.	X
1948 (R)	Warren, Earl	X
1952 (D)	Sparkman, John	X
1952 (R)	Nixon, Richard	
1960 (D)	Johnson, Lyndon B.	
1960 (R)	Rockefeller, Nelson	X
1964 (D)	Humphrey, Hubert	
1964 (R)	Miller, William	X
1968 (D)	Rockefeller, Nelson	X
1968 (R)	Finch, Robert	X
1972 (D)	Kennedy, Edward	
1976 (D)	Mondale, Walter	
1976 (R)	Dole, Robert	
1980 (R)	Ford, Gerald	
1984 (D)	Ferraro, Geraldine	
1988 (D)	Bentsen, Lloyd	X
1988 (R)	Quayle, Dan	X
1992 (D)	Gore, Al	
1996 (R)	Kemp, Jack	X
2000 (D)	Lieberman, Joe	
2000 (R)	Cheney, Dick	
2004 (D)	McCain, John	
2008 (D)	Biden, Joe	
2008 (R)	Palin, Sarah	
<b>Total</b>		<b>12</b>

The table shows that a certain decrease in correct predictions over time is observable. The model predicts the right winner in nine of the thirteen first selection pools from 1940 to 1964, while not having a single correct prediction in the selection pools of the 21<sup>st</sup> century. This can give rise speculations that the model's predictive capacity has declined over the decades, though the number of selection pools is not enough for such a conclusion to be posited with sufficient certainty.

On the other hand, what can safely be concluded is that the conditional regression analysis conducted in model 1 gives little merit to the ticket-balancing theory, as the model has an overall poor fit to the empirical data. Furthermore, it shows that presidential nominees have selected their running mates neither because they balanced the ticket nor rivaled them for their presidential nomination in the current general election. Out of the traditional variables linked to the ticket-balancing theory, only the *size of state* variable had a positive and statistically significant effect.

## 6.4 MODEL 2: THE THEORY OF INCREASED COMPLEXITY

Model 2, which tests the theory of increased complexity, include seven of the eight traditional variables that were also incorporated in model 1, the exception being *age balance*<sup>39</sup>. Accordingly, the model of increased complexity provides another test of the seven corresponding hypotheses H1-H5, H7 and H8.

Also, model 2 provides a test of the hypotheses H9-H15. These six hypotheses postulate that a set of modern explanatory variables will influence the selections: Five of the variables are expected to influence the selections positively, whilst age are expected to have a negative effect in the analyses.

Table 6.5 Model 2: Model of increased complexity

Characteristics of potential ticket	Logit coefficient	Standard error	P-value	Odds ratio
<i>Modern selection variables</i>				
State competitiveness	.02	.02	.296	1.02
Ambition	1.37	.61	.024**	3.94
Media exposure	.83	.28	.003***	2.30
Political experience	1.29	.65	.047**	3.63
Education	.58	.77	.453	1.78
Age	-.12	.05	.014**	0.89
Military service	1.04	.70	.234	2.81
<i>Traditional variables</i>				
Regional balance	.14	.86	.871	1.15
Ideological balance	-.69	.58	.232	.50
Religious balance	-.28	.71	.695	.76
Demographical balance	2.47	1.38	.074*	11.87
Insider-outsider balance	-.67	.81	.408	.52
Current rival	-2.93	1.15	.011**	.05
Size of state	.26	.15	.082*	1.30
<b>Model fit</b>				
Chi <sup>2</sup> (14)	30.64			
Prob > chi <sup>2</sup>	.006***			
Adjusted McFaddens' R <sup>2</sup>	.028			
BIC	21.09			
Percentage of correct predictions	(16/27) 59.2 %			

\* p< .10 \*\*p< .05 \*\*\* p< .01  
N= 168

All significance tests are two-tailed

The table shows that four of the modern selection variables have statistically significant effects, and that these all perform in the expected direction. Firstly, there is the *ambition* variable. This has a positive effect in the model, thus supporting hypothesis H10. The odds ratio further suggests that the effect of *ambition* is large: The odds of a finalist being selected would be almost four times bigger if the finalist had been considered for the vice presidency

<sup>39</sup> See chapter 3, section 3.3.

or competed for the presidency, and thus scored 1 instead of 0 on that variable. That corresponds to an increase of almost 300 % in the odds for selection, all other variables held constant.

Furthermore, the results show that *media exposure* raises the chances of a finalist being selected as vice president, thus supporting hypothesis H11. The odds ratio of the variable tells that the odds for selection will increase by a factor of 2.3 in the odds for selection per unit increase. Following the discussion of section 6.1, a unit increase in *media exposure* corresponds to the score of Palin versus the score of Biden on the variable. Thus, if Palin was equally profiled in the media as Biden was prior to the selection in 2008, her odds of being nominated would have increased by 130 %. Since the difference between Palin and Biden was not very large in terms of number of articles written about them, an odds ratio of that magnitude is clearly indicative of a large effect.

Thirdly, the model shows that, in accordance with hypothesis H12, *political experience* influences the selection positively. In this case too, the odds ratio indicates a substantial effect: A unit increase in the variable means an increase in the odds for selection by a factor of 3.63, holding all other variables constant. That corresponds to a percentage increase of over 250 %. However, when making that statement, the substantive meaning of a unit increase in the variable should again be described: Since the variable is based on a logarithmic transformation of the finalists' years of experience, a unit increase from 0 to 1 would correspond to fewer years in public office than would an increase from 2 to 3.

Fourthly, *age* has a negative effect. Thus, it complies with the expectation in H14 that presidential nominees tend to select running mates that add youth to the ticket. The odds ratio of .89 (a decrease of about 11%) may give a misleading impression of a small effect, especially when compared to the magnitudes of the odds ratios of the three explanatory variables above<sup>40</sup>. However, in interpreting that odds ratio, one must bear in mind that the variable range stretches over 44 years (units). It is hence a plausible argument that the distance between these units is qualitatively smaller than the distance between the units of a dummy. In a comparison, the *age* variable's units can be viewed more as matters of degree

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<sup>40</sup> Generally, the size of negative odds ratios should not be directly compared to positive odds ratio, due to the inverse relationship between them. In this case, however, the comparison is justified: The negative factor change of .89 (=1/1.12) has about the same magnitude as a positive factor change of 1.12 (an 11% decrease versus a 12% increase).

than absolutes, whilst it would be the other way around for the units of a dummy, such as for example *ambition*. Consequently, one cannot measure the change in odds of a one-year increase in *age* against the same standards as a one-unit increase in the *ambition* dummy. Instead, one must lower the expectations about the odds ratio of *age*, and following this, an odds ratio of .89 should not be dismissed as unsubstantial.

None of the other modern variables (*state competitiveness*, *education* and *military service*) have statistically significant effects. Thus, the hypotheses H9, H13 and H15, all expecting the variables to have positively influence the chance of vice presidential selection, are not supported by the model.

In terms of the traditional variables, model 2 does not fully comply with the tendencies that were demonstrated in model 1. Two of the variables that were statistically insignificant in model 1, *demographic balance* and *current rival*, have statistically significant effects in model 2. This inter-model inconsistency unavoidably provides mixed evidence for the respective hypotheses H4 and H7.

Furthermore, the *demographic balance* was one of the variables that were problematized above due to its low level of within-group variance and potential positive bias. Keeping this in mind, the extreme magnitude of the variable's positive effect should appear suspect: The odds ratio shows that a finalist of a different gender/race than the presidential nominee has 12 times greater odds of being selected than a finalist of the same gender and race, all variables held equal. Yet, as discussed in section 6.2, a conditional inference can be made: *If* the presidential nominee actually considers a finalist that balances the ticket demographically (to the point where the finalist is added to the shortlist), the chances of that finalists being selected would be very high. In turn, this indicates that demographically balanced tickets do not just randomly occur. One can speculate that the selections of the demographically balancing finalists are the results of conscious choices largely *because* of their gender or ethnic background.

The *current rival* variable, on the other hand, is not subject to similar reservations of lack of variance. Model 2 shows that rivalry for the presidential nomination in the current election cycle lowers a finalist's chances of receiving the vice presidential nod. The magnitude of this variable's negative effect can be considered extreme: The odds ratio is .05. That corresponds



to a decrease of 95 % in the odds of selections if a finalist was a rival for the presidential nomination. And because negative odds ratios are in an inverse relationship to positive ones, the factor change of .05 is size-wise equivalent to a positive factor change of 20. *Current rival* is consequently the dummy variable in both models 1 and 2 with the largest effect. Hypothesis H7, which found no support in model 1, is further weakened by model 2: Presidential rivalry in the current election cycle does not appear to increase the finalists' likelihood of selection. Rather, it would contribute heavily to the finalist *not* being selected.

Lastly, the final significant variable in model 2's bulk of traditional variables, *size of state*, complies with the findings in model 1. The effect is approximately the same size, with an odds ratio of 1.3 compared to 1.24 in model 1. Thus, hypothesis H8 is further strengthened by model 2: Size of state appears to have a positive effect on the finalist's chance of being selected.

In sum, an inspection of the variables' effects in model 2 demonstrates that four out of seven modern selection variables comply with the expectations of the theory of increased complexity: According to the model, presidential nominees tend to select running mates that 1) add youth to the ticket, 2) have political ambitions, 3) are highly profiled in the media and 4) are experienced in politics. Also, three of the traditional variables have significant effects. *Size of state* and *demographic balance* have positive effects and perform in line with the theoretical expectations, albeit the latter only conditionally. *Current rival*, on the other hand, deviates from the theory by having a negative effect on the vice presidential selection. Thus, the presidential nominees also select running mates that 5) come from a populous state, 6) have made it to the shortlist despite being of a different gender or race than the presidential nominee and 7) have not rivaled them for the presidential nomination.

In terms of overall fit, model 2 performs better than model 1. Unlike model 1, the likelihood ratio test shows that model 2 is statistically significantly better than a null model. Furthermore, model 2's adjusted McFadden's  $R^2$  and the BIC also offer improvements from model 1, the former moving from a negative to a positive value and the latter measure decreasing by two units. Yet, following the guidelines presented in chapter 4, a two-unit decrease in BIC is only indicative of a minor improvement. Therefore, the evidence that favors model 2 to model 1 can be characterized as weak. In this respect, it should be recalled that both the BIC and the adjusted McFadden's  $R^2$  penalizes models that includes inefficient variables. Model 2,

comprising 7 variables that have statistically insignificant effects, can undoubtedly fall within that category. This may help explain why model 2 is only slightly preferable to model 1 when it comes to model fit.

Finally, the model correctly predicts 59.2 % of the selection pool winners, representing an increase of 4 correct predictions from model 1. An overview of the correct and failed predictions is presented below.

Table 6.6 Correctly predicted cases in model 2

Year	Selection pool winner	Correctly predicted
1940 (D)	Hull, Cordell	X
1944 (D)	Truman, Harry	
1944 (R)	Warren, Earl	X
1948 (D)	Douglas, William O.	
1948 (R)	Warren, Earl	X
1952 (D)	Sparkman, John	
1952 (R)	Nixon, Richard	
1960 (D)	Johnson, Lyndon B.	X
1960 (R)	Rockefeller, Nelson	X
1964 (D)	Humphrey, Hubert	X
1964 (R)	Miller, William	
1968 (D)	Rockefeller, Nelson	X
1968 (R)	Finch, Robert	
1972 (D)	Kennedy, Edward	X
1976 (D)	Mondale, Walter	X
1976 (R)	Dole, Robert	
1980 (R)	Ford, Gerald	X
1984 (D)	Ferraro, Geraldine	
1988 (D)	Bentsen, Lloyd	X
1988 (R)	Quayle, Dan	X
1992 (D)	Gore, Al	X
1996 (R)	Kemp, Jack	X
2000 (D)	Lieberman, Joe	
2000 (R)	Cheney, Dick	
2004 (D)	McCain, John	X
2008 (D)	Biden, Joe	
2008 (R)	Palin, Sarah	X
<b>Total</b>		<b>16</b>

The table shows that the model's predictive capacity applies to both parties and all decades (except in the two selection pools in 1952, in which the model missed). Compared to model 1, model 2 is thus observably better at predicting selection pool winners correctly in the most recent decades. Whilst model 1 only has one correct prediction after 1988, model 2 has four: It correctly predicts the winners in the 2004 Democratic pool and the 2008 Republican pool, as well as both pools in the 1990's.

The measures of model fit (and predictive capacity) thus confirm the impression given by the examination of the effect of the variables: Model 2 has an overall better performance than model 1. Yet, considering that model 1's score on these measures could be characterized as very poor (for example by the likelihood ratio test not being statistically significant), it should be noted that the improvement represented by model 2 is by no means dramatic. The fit of model 2 would surely benefit from removing some of the inefficient predictors (this will be done later in the synthesis model).

## 6.5 MODEL 3: THE THEORY OF CHANGED DYNAMICS

There are three explicit hypotheses that are deduced from the theory of changed dynamics. H16 and H17 postulates that the traditional variables *regional balance* and *size of state* will have a positive effect only before 1976, whilst H18 expects political experience to have a positive effect only after 1972. Thus, the hypotheses also contain an inherent expectation regarding the “opposite” variables (*regional balance post-1972*, *size of state post-1972* and *political experience pre-1976*): These variables are presumed to have statistically insignificant, unsubstantial or even negative effects on the vice presidential selections. Consequently, for the hypotheses to be supported by the analysis, both the two time-demarcated variables must be taken into account: The hypotheses would only be confirmed if the variables have different effects.

Table 6.7 Model 3: Model of changed dynamics

Characteristics of potential ticket	Logit coefficient	Standard error	P-value	Odds ratio
Political experience pre-1976	-.32	.51	.529	.73
Political experience post-1972	.54	.59	.361	1.71
Size of state pre-1976	1.09	.43	.011**	2.97
Size of state post-1972	-.09	.17	.607	.92
Regional balance pre-1976	2.08	1.78	.243	8.01
Regional balance post-1972	.19	.86	.821	1.22
<b>Model Fit</b>				
Chi <sup>2</sup> (6)	18.98			
Prob > chi <sup>2</sup>	.004***			
Adjusted McFadden's R <sup>2</sup>	0.074			
BIC	6.39			
Percentage of correct predictions	(14/27) 51.8			

\* p< .10 \*\*p< .05 \*\*\* p< .01  
N= 168

All significance tests are two-tailed

Table 6.7 shows that the only variable in model 3 to have a statistically significant effect is *size of state pre-1976*. The effect is positive and also substantive. All other variables held constant, a unit increase in the variable (moving for example from a state with 3 electoral

votes to a state of 8 electoral votes) would correspond to a factor change of almost 3 in the odds for selection. This factor change is more than twice the size of the unmodified time-constant variable *size of state* in model 1 and 2. That the effect is larger when limited to the period of 1940-1972 than for the entire period as a whole could arguably be interpreted in favor of the theory of changed dynamics.

Also, the “opposite” variable *size of state post-1972* has a statistically insignificant effect in the negative direction. Combined, the *pre-1976* and *post-1972* variables therefore represent strong support for hypothesis H17, which expects the positive effect of size of state to only take place in the period before 1976. Logically, that also contests the premise of hypothesis H8, which postulated that the effect of *size of state* is constant across the whole period 1940-2008 (and found support in models 1 and 2).

With regards to the other variables, there is no equivalent compliance with the theoretical expectations. First, the *political experience* variables: Though both variables have effects in directions that fit the theory (positive after 1972 and negative before 1976), the effects are not statistically significant. To verify that this result is not affected by the variables’ internal correlation, the model is replicated twice, each time excluding one of the variables (see Appendix)<sup>41</sup>. That the variables have statistically insignificant effects in all the models thus increases the reliability of the result: Hypothesis H18 is not substantiated, as political experience does not have a positive effect on the vice presidential selections - in any of the two periods.

Second, the *regional balance pre-1976* and *post-1972* variables also have insignificant effects, and H16 is thus not supported. However, a note of caution must be included. Due to an extremely low level of within-group variance in the *pre-1976* variable (see section 6.2), it is possible that this variable has a negative bias and does not fully capture the “true” positive effect of regional balance before 1976. Nevertheless, though this means that the variable estimate’s reliability is somewhat drawn into question, the interpretation of the model is still unambiguous. It shows no observable significant difference in the selection of regionally balancing finalists between the different sides of the 1972/1976 demarcation line.

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<sup>41</sup> See chapter 5, section 5.4.3, for discussion of these variables’ intercorrelation.

In terms of model fit, model 3 performs well compared to the other two models. Firstly, the likelihood ratio test of the model is statistically significant. Secondly, the relative measures of model fit represent an improvement from model 2. The adjusted McFadden's  $R^2$  has increased and (more dramatically) the BIC value has decreased by an entire 14 units. A difference of that magnitude is characterized as *very strong* evidence in favor of the latter model. Still, it must again be noted that since BIC and McFadden's  $R^2$  are both variable-sensitive measures, and model 3 therefore benefits from being more parsimonious than model 2 (including only six variables compared to model 2's fourteen).

When it comes to generating correct predictions, model 3's performance is slightly inferior to that of model 2. It has 14 correct predictions, corresponding to a percentage of correct predictions of 51.8. This places model 3 in between the two former models, having two more correct predictions than model 1 and two fewer correct predictions than model 2.

Table 6.8 Correctly predicted cases in model 3

Year	Selection pool winner	Correctly predicted
1940 (D)	Hull, Cordell	
1944 (D)	Truman, Harry	X
1944 (R)	Warren, Earl	X
1948 (D)	Douglas, William O.	
1948 (R)	Warren, Earl	X
1952 (D)	Sparkman, John	
1952 (R)	Nixon, Richard	X
1960 (D)	Johnson, Lyndon B.	X
1960 (R)	Rockefeller, Nelson	X
1964 (D)	Humphrey, Hubert	
1964 (R)	Miller, William	X
1968 (D)	Rockefeller, Nelson	X
1968 (R)	Finch, Robert	X
1972 (D)	Kennedy, Edward	
1976 (D)	Mondale, Walter	
1976 (R)	Dole, Robert	X
1980 (R)	Ford, Gerald	X
1984 (D)	Ferraro, Geraldine	
1988 (D)	Bentsen, Lloyd	
1988 (R)	Quayle, Dan	
1992 (D)	Gore, Al	
1996 (R)	Kemp, Jack	
2000 (D)	Lieberman, Joe	X
2000 (R)	Cheney, Dick	X
2004 (D)	McCain, John	
2008 (D)	Biden, Joe	X
2008 (R)	Palin, Sarah	
<b>Total</b>		<b>14</b>

Examining the table closely, there is a detectable difference between predictions in the two party camps. The model has correctly predicted 9 out of 12 Republican selections, whilst only

5 out of 15 Democratic selections. The predictive capacity of model 3 thus seems to apply more to Republican vice presidential picks than Democratic ones. The predictive capacity *over time*, on the other hand, seems to be rather constant: The only notable tendency in this respect is a “gap” in successes after 1980 up to 2000, where the model missed all five selection pools. This time period also represents the strongest deviation from model 2, which comparatively had correct predictions in four out of these five selection pools.

All in all, however, the performance of model 3 is very decent. There is a difference in the dynamics of the vice presidential selections between the periods before and after 1976/1972 with regards to the effect of the finalists’ home states’ sizes. Though no such difference is observable when it comes to political experience and regional balance, the model still has an overall better fit than the other two models.

## 6.6 MODEL COMPARISON

In a summarizing comparison of the three models, model 1 is by far the one with the lowest overall model fit, not even being statistically significant overall. Model 2 fared better, whilst model 3 represented the most substantial improvement in model fit from both the other models.

Though producing correct predictions is a less important goal for the models (see chapter 4, page 35), it can still be noted that model 1 has the weakest performance also on this measure, but that the internal ranking between model 2 and model 3 is reversed: Model 2 has the highest percentage of correctly predicted selection pool winners. Also, it is perhaps a notable peculiarity that though the model’s prediction success patterns are diverse, one selection pool stands out as being especially unpredictable: Neither of the models was able to predict Geraldine Ferraro as the winner of the 1984 Democratic selection.

When it comes to the different independent variables, all three models include variables that comply with the theoretical expectations. Model 1, testing the ticket-balancing theory, demonstrates that *size of state* has a statistically significant and positive effect on the vice presidential selections. Model 2 shows that four of the modern selection variables (*ambition, media exposure, political experience* and *age*) have effects in accordance with the theory of increased complexity. It also demonstrated that two of the traditional variables (*size of state and demographic balance*) were in line with both the first two theories, albeit the latter

variable only conditionally. Lastly, model 3 demonstrates that the performance of the interrelated variables *size of state pre-1976* and *size of state post-1972* is in line with theory of changed dynamics.

All the theories thus demonstrate some compliance with the empirical data in the models. Yet, none of them fully hit the mark. Few of the ticket-balancing variables complied with the theoretical expectations, some of the modern selection criteria introduced by the theory of increased complexity had no explanatory power and, finally, the threshold of temporal change postulated by the theory of changed dynamics is only found to apply to the *size of state* variable.

Thus, the overall conclusion is that though the theory of increased complexity and the theory of changed dynamics explain vice presidential selection better than the ticket-balancing theory, there is certainly room for improvement in terms of model construction. In that vein, the thesis proposes a synthesis model, combining the most efficient explanatory theoretical features. This model aims to represent a better (and more parsimonious) explanation for vice presidential selections of the whole period 1940-2008.

## 6.7 STEP-WISE CONSTRUCTION OF THE SYNTHESIS MODEL

Searching to present the best explanatory model of the historical vice presidential selections, the synthesis model will include the variables that have demonstrated explanatory efficiency in the three former models, regardless of their theoretical affiliation. The table below gives a complete overview of variables that meet this criterion.

Table 6.9 Overview of variables with significant effects in models 1, 2 and 3

Variable	Model 1		Model 2		Model 3	
	Significant	Direction	Significant	Direction	Significant	Direction
H4 Demographic balance	No	Positive	Yes	Positive	-	-
H7 Current rival	No	Negative	Yes	Negative	-	-
H8 Size of state	Yes	Positive	Yes	Positive	-	-
H10 Ambition	-	-	Yes	Positive	-	-
H11 Media exposure	-	-	Yes	Positive	-	-
H12 Political experience	-	-	Yes	Positive	-	-
H14 Age	-	-	Yes	Negative	-	-
H17	Size of state pre-1976	-	-	-	Yes	Positive
	Size of state post-1972	-	-	-	No	Negative

The table includes nine different explanatory variables. Six of them, *demographic balance*, *current rival*, *ambition*, *media exposure*, *political experience* and *age*, can be included in the synthesis model without hesitation. However, the three remaining variables are more problematic. They represent theories/hypotheses based on irreconcilable premises and cannot be included in the same model. The synthesis model must inevitably choose between the traditional variable measuring *size of state* and the modified variables measuring *size of state post-1972* and *size of state pre-1976*.

Faced with this choice, it should be remarked that the findings presented thus far in the chapter can be interpreted in favor of the latter pair of time-demarcated variables. The reason is two-fold. First, the model testing the theory of changed dynamics clearly outperforms the model testing the ticket-balancing theory in terms of model fit and predictive success. Second, though the effects of the variables cannot be directly compared across the different models, one should still note the difference in odds ratio between the *size of state* variable in model 1 and 2 and *size of state pre-1976* in model 3. That the latter variable by far has the largest odds ratio indicates that this is more efficient in explaining the vice presidential selections, especially considering the statistical insignificance of the *size of state post-1972*.

Nevertheless, the two alternative choices of variable(s) can be evaluated statistically. Specifically, two likelihood-ratios test can be conducted. First, a synthesis model is constructed both with and without the un-modified *size of state* variable. The likelihood ratio test thus determines whether the added variable significantly improve the model's explanatory power. Second, the synthesis model is constructed with and without the modified variables *size of state pre-1976* and *size of state post-1972* and the synthesis model tests whether these variables jointly represent an improvement to the model fit. The results of the tests are tabulated below.

Table 6.10 Likelihood ratio tests of alternative variables' contribution to model 4

Variable(s)	<i>Size of state</i>	<i>Size of state pre-1976</i> <i>Size of state post -1972</i>
<b>Chi<sup>2</sup></b>	2.18	11.33
<b>Degrees of freedom</b>	1	2
<b>Prob &gt; chi<sup>2</sup></b>	.140	.004***

\* p< .10 \*\*p< .05 \*\*\*.p< .01

The two likelihood ratio tests demonstrate that *only* the two variables *size of state pre-1976* and *post-1972* offer a significant improvement of the synthesis model's fit. This has obvious



implication for the construction of the synthesis model. It includes the two time-demarcated variables instead of the time-constant *size of state*. As such, hypothesis H8, postulating size of state to have a positive effect on the entire period of vice presidential selections, is rejected. Instead, hypothesis H17, expecting the positive effect of size of state to be limited to the period before 1976, is preferred.

In turn, that implies that model 4 incorporates elements both from the theory of increased complexity and the theory of changed dynamics. The ticket-balancing theory must be seen as playing a subordinate role, included only indirectly as parts of the other two theories.

### 6.7.1 Model 4: Synthesis model – version 1

Table 6.11 Model 4: The synthesis model

Characteristics of potential ticket	Logit coefficient	Standard error	P-value	Odds ratio
<i>Traditional variables</i>				
Current rival	-3.28	1.32	.013**	.04
Demographic balance	1.81	1.07	.090*	6.13
<i>Modern variables</i>				
Ambition	1.38	.61	.023**	3.96
Media exposure	.64	.26	.013**	1.91
Political experience	.88	.65	.176	2.42
Age	-.07	.05	.162	.93
<i>Time-demarcated variables</i>				
Size of state pre-1976	.86	.33	.009***	2.35
Size of state post-1972	-.13	.21	.523	.88
<b>Model Fit</b>				
Chi <sup>2</sup> (8)	34.17			
Prob > chi <sup>2</sup>	.000***			
Adjusted McFadden's R <sup>2</sup>	.192			
BIC	-2.21			
Percentage of correct predictions	(15/27) 55.6 %			

\* p < .10 \*\* p < .05 \*\*\* p < .01  
N = 168

All significance tests are two-tailed

The table shows that model 4 has statistical merit. Most of the variables have statistically significant effects that comply with the theoretical expectations. Only three variables *political experience*, *age* and *size of state post-1972* are statistically insignificant. The insignificant effects of the two former variables mean that hypotheses H12 and H14 are not supported by the model: Presidential nominees have not been significantly more likely to include youth or political experience to the tickets. In contrast, the insignificant effect of *size of state post-1972* is in accordance with the expectations in hypothesis H17. It demonstrates that the positive effect of size of state is limited to the period before 1976.

Model 4's percentage of correct predictions is also of an acceptably high level. 15 correctly predicted selection pool is better than models 1 and 3, yet one less than model 2. However, in terms of model fit, model 4 clearly outperforms the previous three models. Compared to model 3 (which had the best fit of the former models), the adjusted McFadden's  $R^2$  has increased markedly, by .124. Also, the BIC has decreased by 8.6, which is characterized as *strong* evidence in favor of model 4. Nevertheless, the model can still be ameliorated: Of consideration of efficacy, parsimony and model specification, the variables that has insignificant effects should be removed.

### 6.7.2 Model 5: Final synthesis model

The new and final version of the synthesis model, labeled *model 5*, is thus constructed by excluding the following variables from model 4: Firstly, there is *age* and *political experience*. Secondly, *size of state post-1972* is discarded. That variable has already demonstrated that the time-demarcation of the *size of state* variable is justified in model 4, but since keeping it in the model would lessen the overall model fit, it is excluded in model 5.

To justify the removal of these three variables statistically, a likelihood ratio test of the two (nested) models 4 and 5 is conducted.

Table 6.12 Likelihood ratio test of model 4 vs model 5

<b>Chi<sup>2</sup></b>	3.52
<b>Degrees of freedom</b>	3
<b>Prob &gt; chi<sup>2</sup></b>	.318

\* p< .10 \*\* .p< .05 \*\*\* .p< .01

The test demonstrates that the three variables do not significantly improve of the model's fit and that the exclusion of them will not be on the expense of the model's explanatory power. Hence, they are confidently discarded in model 5, as tabulated below.

Table 6.13 Model 5: The final synthesis model

Characteristics of potential ticket	Logit coefficient	Standard error	P-value	Odds ratio
Current rival	-2.88	.98	.023**	.05
Ambition	1.33	.59	.025**	3.77
Media exposure	.5	.23	.028**	1.64
Size of state pre-1976	.84	.30	.005***	2.33
Demographic balance	1.57	1.26	.110	4.80
<b>Model Fit</b>				
Chi <sup>2</sup> (5)	30.65			
Prob > chi <sup>2</sup>	.000***			
Adjusted McFadden's R <sup>2</sup>	.218			
BIC	-8.58			
Percentage of correct predictions	(15/27) 55.6 %			

\* p< .10 \*\*p< .05 \*\*\* p< .01 All significance tests are two-tailed  
N= 168

In terms of variable effect, the model largely corresponds to model 4. The variables have statistically significant effects in the same directions, and their odds ratios are approximately of the same magnitude.

The effect of the traditional variable *current rival* is negative and large. All other variables held constant, a finalist that rivaled the presidential nominee for the nomination would decrease his odds for selection by a factor of .05. Thus, the variable thoroughly refutes the premise of hypothesis H7. Instead of having the expected positive effect, rivalry for the presidential nomination in the current election cycle rather appears to minimize the electoral prospects of vice presidential finalists. In practice, this implies that even if Barack Obama had seriously considered Hillary Clinton as a running mate, her chances of being selected would probably have been slim: Her participation in the 2008 Democratic primaries would have decreased her chances by 96 %.

*Ambition*, on the other hand, is compliant with the theory: It influences the selections positively, thus substantiating hypothesis H10. The odds ratio indicates that having been considered for the vice presidency or competed for the presidency in previous elections makes the selection odds increase by a factor of 3.96, all other variables held constant. Continuing with the example of Hillary Clinton, this means that her rivalry with Obama for the nomination in 2008 would enlarge her chances of being selected as vice president *in the future*. In fact, in the hypothetical scenario that a presidential nominee in 2012 would consider Clinton as running mate, her experiences in 2008 would increase her odds of being selected by nearly 300 %, all variables held equal.

The effect of *media exposure* is also positive. The variable has an odds ratio of 1.94, which is only slightly below the odds ratio that was indicated in model 2. Again, to simplify the interpretation of the odds ratio, a unit increase on the variable is equaled to the difference between Sarah Palin and Joe Biden: If Palin had Biden's level of media coverage in 2008, her odds for selection would nearly double, holding all other variables constant. Hypothesis H11 is therefore again supported. Media exposure significantly increases a finalist's vice presidential prospects.

*Size of state pre-1976* has a significant and positive effect. The odds ratio shows that a unit increase (again comparing a state with 3 electoral votes to a state with 8 votes) would more than double a finalist's odds for selection, all other variables held constant. That substantiates the argument presented in hypothesis H17: The finalists hailing from large states would have a significant advantage in terms of being selected as running mate in the period between 1940 and 1976.

The only slight deviation from model 4 is the *demographic balance* variable. In model 4, it was statistically significant and had an odds ratio of over 6. In model 5, the p-value is only marginally above .10 and the odds ratio is 4.8. That is still a sizeable effect, though. If a finalist was of a different gender or racial background than the presidential nominee, holding all other variables constant, the odds of the candidate would increase by almost 400%. Thus, the H4 is still conditionally supported. Though balance of gender and ethnic background does not always count as positive assets for the vice presidential candidates, it seems that they are aspects that are consciously deliberated by the presidential nominee: If the selection pool contains demographically balancing finalists, the chances are that one of these finalists would be selected (like they did in both selection pools of 2008).

Also, in terms of model fit, model 5 improves upon model 4<sup>42</sup>. The likelihood ratio test is statistically significant, the adjusted McFadden's  $R^2$  has increased and the BIC is reduced by over 4 units. This is indicative of *positive* evidence in favor of model 5. The percentage of correct predictions is however, unchanged at 15 correct predictions.

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<sup>42</sup> The analysis of model 5 was repeated in a sixth model, where the not-so-significant *demographic balance* was excluded. However, this only caused a marginal improvement in model fit. The remaining variables' effects direction, odds ratios and statistical significance remained fairly unchanged. Thus, the inclusion of a model 6, without demographic balance, in the thesis would have no influence on the conclusions.

Table 6.14 Correctly predicted cases in the final synthesis model

Year	Selection pool winner	Correctly predicted
1940 (D)	Hull, Cordell	X
1944 (D)	Truman, Harry	
1944 (R)	Warren, Earl	X
1948 (D)	Douglas, William O.	
1948 (R)	Warren, Earl	X
1952 (D)	Sparkman, John	
1952 (R)	Nixon, Richard	
1960 (D)	Johnson, Lyndon B.	X
1960 (R)	Rockefeller, Nelson	X
1964 (D)	Humphrey, Hubert	
1964 (R)	Miller, William	X
1968 (D)	Rockefeller, Nelson	X
1968 (R)	Finch, Robert	X
1972 (D)	Kennedy, Edward	X
1976 (D)	Mondale, Walter	X
1976 (R)	Dole, Robert	
1980 (R)	Ford, Gerald	
1984 (D)	Ferraro, Geraldine	
1988 (D)	Bentsen, Lloyd	X
1988 (R)	Quayle, Dan	X
1992 (D)	Gore, Al	X
1996 (R)	Kemp, Jack	
2000 (D)	Lieberman, Joe	
2000 (R)	Cheney, Dick	
2004 (D)	McCain, John	X
2008 (D)	Biden, Joe	
2008 (R)	Palin, Sarah	X
<b>Total</b>		<b>15</b>

The table shows that the predictive capacity of the model reaches its peak in the decade from 1964 to 1976. Still, the model has correct predictions in all decades, thus a time-related trend in the prediction successes is not immediately apparent. Also, in comparison with the 16 correct predictions of model 2, the success pattern is quite similar. Models 2 and 4 only deviates in three selection pools: Model 2 successfully predicted the Republican selections in 1980 and 1996, whereas model 4 predicted the Republican selection of 1964 correctly.

## 6.8 SUMMARY OF THE EMPIRICAL FINDINGS

The final synthesis model is constructed with the objective of providing the best explanation for the vice presidential selections. To that end, it combines aspects of both the theory of increased complexity and the theory of changed dynamics, whilst the ticket-balancing theory is merely indirectly included as an integral element of the theory of increased complexity. Model 5 thus comprise the five variables that most consistently have had significant effects in the same directions in all the models. The robustness of the findings of model 5 is thus maximized.

Table 6.15 The findings of the final synthesis model:

	Variable	Expected effect	Actual effects				Implication for hypothesis
			Model 1	Model 2	Model 3	Synthesis model(s)	
<b>H4</b>	Demographic balance	Positive	<i>Not significant</i>	<i>Positive</i>	-	<i>Positive</i>	H4 is (conditionally) supported
<b>H7</b>	Current rival	Positive	<i>Not significant</i>	<i>Negative</i>	-	<i>Negative</i>	H7 is Rejected
<b>H10</b>	Ambition	Positive	-	<i>Positive</i>	-	<i>Positive</i>	H10 is supported
<b>H11</b>	Media exposure	Positive	-	<i>Positive</i>	-	<i>Positive</i>	H11 is supported
<b>H17</b>	Size of state pre-1976	Positive	-	-	<i>Positive</i>	<i>Positive</i>	H17 is supported

The table shows that the hypotheses H10, H11 and H17 are conclusively supported by the analyses. It seems that ambition and media exposure should be considered definite advantages for a finalist aiming for the slot as presidential running mate. Also, for the selections up to 1976, the size of the finalists' home states was of concern for the presidential nominees: The more electoral votes of the state, the better the finalist's chances of being selected.

With regards to H4, demographically balancing the ticket would too count as a benefit, but only on the occasions where the presidential nominee signals that he/she is open to such balance by including finalists of a different gender or ethnicity on the shortlist. Thus, the hypotheses are conditionally supported. Though it cannot be claimed that the variable has a uniformly positive effect (the effect can rather be described as occasionally positive), it seems that the finalists' gender and race are aspects that are taken into consideration by the presidential nominee.

Hypothesis H7 must, on the other hand, be rejected: Rather than having a positive effect, being a rival for the presidential nomination in the current election cycle would *dramatically* decrease the finalists' chances of being selected (as indicated by the extreme size of the odds ratio's negative factor change).

Also, in a summary of the analysis' findings, one should mention that there are mixed results for *political experience* and *age*, being statistically significant in model 2, but not in model 4. Secondly, the un-modified *size of state* variable has a positive effect in models 1 and 2, yet is

rejected when compared with the results of model 3, that indicates that the size of the finalist's home states only matters before 1976.

Finally, there are nine hypotheses than finds no support in the analyses, and thus can be discarded with some confidence. It seems that apart from the *demographic balance* variable, none of the balancing variables influence the selections, neither positively nor negatively. The same applies to the modern variables *state competitiveness*, *education* and *military service*. Also, *political experience* has no effect on the selection of vice presidents, neither for the entire period nor when tested separately in the periods before and after 1976/1972. However, though the *regional balance pre-1976* and *post-1972* had effects that also were insignificant, the hypothesis cannot be rejected with the same certainty because of the potential bias in the *pre-1976* variable.

## 7 CONCLUSION

The research conducted in this thesis confirms the basic premise shared by all three theories: There are observable systematic tendencies in the selection of vice presidential candidates from 1940 to 2008. The most evident mechanisms are the following:

In general, presidential nominees pick running mates that enjoy extensive media coverage. Also, the presidential nominees tend to pick running mates that have been considered for the vice presidency or sought the presidency in earlier election cycles. However, if the finalists sought the presidential nomination in the current election cycle, thus rivaling the presidential nominee, they tend *not* to be selected. Furthermore, there is a discernable change *over time* in the selection dynamics. Presidential nominees tended to pick running mates from states that had many electoral votes in the period before 1976, but not after 1972. Finally, the running mates' genders and ethnic backgrounds are factors that are included in the decision calculus. Seemingly, certain presidential nominees want demographically balanced tickets, but the overall majority of them do not even consider the possibility of running with a politician of a different gender or race.

Thus, the answer to the thesis' research question is that *ambition, media exposure, rivalry for the presidential nomination* and, to some extent, *demographic balance* and *size of state* are the factors that best explain the vice presidential selections from 1940 to 2008.

These findings have implications for the theoretical framework, for future research and for the empirical reality of vice presidential selections. This final chapter of the thesis discusses all of these aspects.

### 7.1 IMPLICATIONS FOR THE THEORETICAL FRAMEWORK

Gerald Pomper (1968: 129) wrote that "in a science of politics, disproving hypotheses is as important as their confirmation." In that vein, the thesis offers a vital contribution to the literature. It rejects all the hypotheses derived from the conventional wisdom of presidential selections, leading to a conclusion that the ticket-balancing theory has little statistical value in explaining the historical selection dynamics. From 1940 to 2008, presidential nominees have generally *not* selected their running mates because they balanced the ticket in some way (albeit with the slight exception of demographic balance). Also, the effects of the vice



presidential home states and rivalry for the presidential nomination are not compliant with the expectations of the ticket-balancing theory. Thus, the analysis shows that the ticket-balancing theory can be considered outdated. It is certainly outranked by the two theories that represented modifications of the conventional wisdom.

So why are the two other theories better at explaining vice presidential selections? Firstly, the theory of increased complexity introduces *new selection criteria* that have significant explanatory power (especially media exposure and political ambitions). Secondly, the theory of changed dynamics offers a valuable perspective on *change over time* in the selection process: There seems to have been different dynamics governing the selections before 1976 and after 1972, at least in terms of the size of state variable. Both these “updated” theories hence offer valuable insights to the underlying mechanisms of vice presidential selection, more so than the ticket-balancing theory. Thus, this thesis suggests that the theoretical framework of the vice presidential selection would benefit from an amalgamation of these two perspectives.

## **7.2 IMPLICATION FOR FUTURE RESEARCH**

The synthesis model proposed in the thesis demonstrates substantial explanatory power for the vice presidential selections of 1940 to 2008, thus shedding some light on the selection dynamics. Still, there is much work left to do. Firstly, the perspective of temporal change should be further explored. The statistical analysis in this thesis was obviously affected by the (necessarily) small sample size and consequently low level of within-group variance, especially when it came to determining the effects of for example regional balancing before and after the watershed in 1972. Thus, the thesis’ analysis could arguably benefit from being supplemented by more in-depth studies of the vice presidential selections. Such studies would also be more sensitive to the differing electoral contexts than could a quantitative analysis.

Also, the set of modern selection criteria can imaginably be expanded. For example; how has the greater use of opinion polls affected the selection? How about politicians that actively campaign for their selection to the office? What is the importance of the personal compatibility between the presidential nominee and his running mate? And, following Skowronek (2008)’s perspective on political time, do different categories of presidents choose

different types of running mates<sup>43</sup>? These are all aspects that could be researched further. And if the vice presidency continues to develop in the same direction and pace as it has done the last decades, the importance of this research will be even more urgent. One can no longer claim that the vice presidency is insignificant (or worth less than a pitcher of whatever content), any more than one can claim that the selection of the office's occupants are irrelevant.

### 7.3 IMPLICATIONS FOR EMPIRICAL REALITY

The vice president is essentially selected by one single (though popularly elected) person. Thus, the vice presidential selection process is at best indirectly democratic. That has been a cause for criticism of the office (Albert 2005; Goldstein 1977; Natoli 1980b, 1979). Yet, one can argue that the lack of democratic features of the selection process is only worrisome if it results in the wrong person getting the job. If presidential nominees selected their running mates based on their competence and ability to do the job, it would not be considered equally problematic (Nelson 1988: 484; Schlesinger 1974).

From such a normative perspective, the results of the thesis' analyses can be regarded as somewhat disappointing. First, the analyses find that political experience is *not* a key selection criterion. In none of the periods before 1976 or after 1972 (or in the entire period for that matter) did this variable influence the vice presidential selections significantly. Second, there is no robust evidence that presidential nominees tends to pick the candidates with the highest education<sup>44</sup>. Rather, the selections are dominated<sup>44</sup> by characteristics that do not necessarily correlate with competence (i.e. finalists' genders/ethnic backgrounds, their ability to get the media's attention and the size of their home state). The only consolation in this respect must be the presidential nominees' tendency of picking ambitious running mates. Though ambition is not synonymous with skill, one can at least hope that politicians that have previously sought the presidency or been considered as a potential vice president should have certain capabilities. Nevertheless, the conclusion of the thesis runs counter to the claim of Michael Nelson (1988: 865) that the presidential nominees' incentive for picking a competent running mate and desire to win the election have now converged. It still seems that ability to govern the country is not the main concern in the vice presidential selection.

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<sup>43</sup> This idea was proposed and initially investigated by Julia Azari (2006).

<sup>44</sup> Chapter six demonstrated that the *education* variable had a positive effect in model 2, but the effect was insignificant when the variable was retested in the synthesis model 4.

### 7.3.1 *The selection of 2012*

As argued in chapter 3, explanation is built upon the same basic logic as prediction. The variables used for explaining the history of vice presidential selections will probably be pertinent in upcoming elections as well. So what implications do the thesis' findings have for future selections of vice presidents? Admittedly, to engage in the "veepstakes" of 2012 already in 2009 is perhaps to overreach. Yet, some vague speculations on the Republican choice of vice president can be posited<sup>45</sup>.

The thesis' synthesis model suggests that it would be a politician that had shown some political ambitions and have high media profiles. To find examples of potential candidates, one can therefore look to John McCain's primary competitors for the presidential nomination in 2008. There is for instance Mike Huckabee and Mitt Romney. Quick searches in the archives of New York Times and Times Magazine show that they both enjoy extensive media coverage<sup>46</sup>. Thus, if neither of these candidates run for the 2012 presidency, they should both have decent chances for securing the vice presidential nod<sup>47</sup>. Still, this is inevitably closer to guesses than predictions. The fact that the identity of the presidential nominee is unknown makes it impossible to forecast anything with certainty. However, when the Republican presidential nominee is appointed in 2012 *and* there exists a shortlist of possible vice presidential candidates, one can certainly make more robust predictions based on the synthesis model.

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<sup>45</sup> It is highly uncommon for a president to replace the running mate when seeking the second term (this has not happened since 1976). Thus, one can safely assume that Obama will most likely run again with Biden on the Democratic ticket in 2012.

<sup>46</sup> For the period of January 1<sup>st</sup> to November 1<sup>st</sup> 2009, Huckabee was mentioned in 30 articles in the New York Times and 28 articles in the Times, whereas the respective number of articles for Romney was 50 and 28.

<sup>47</sup> Given a white male Republican presidential candidate, some would even claim that Mitt Romney could balance the ticket demographically, since his father was born on Mexican soil (albeit in a Mormon colony, so it is perhaps a stretch of the concept of ethnicity)

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## 9 APPENDIX

### 9.1 OVERVIEW OF THE DELTA-BETA VALUES OF THE “CRITICAL CASES”

The “critical cases” are the units of analysis that were only included in one of the datasets H&K and JB. The Delta-Beta statistic measures the difference in the coefficient vector that is caused by the deletion of a unit of observations. The higher the values, the more does the deletion of the unit of observation influence the result of the analysis. The table below shows that none of the “critical cases” have severely elevated Delta-Beta values in more than one of the three models.

Table 8.1. Delta-Beta values of the “critical cases” 1960-2004\*.

Finalist	Selection pool	Model 1	Model 2	Model 3
Nelson Rockefeller	1964 (R)	.006	.025	.000
Joseph D. Alioto	1968 (D)	.004	.023	.000
Edward Kennedy	1968 (D)	.084	.019	.000
George H. W. Bush	1968 (R)	.014	.007	.105
Edward Muskie	1976 (D)	.004	.014	.003
Robert Dole	1988 (R)	.003	.001	.002
Mario Cuomo	1992 (D)	.056	.881	.387
Richard Gephardt	1992 (D)	.002	.004	.002
Jim Edgar	1996 (R)	.002	.001	.002
John McCain	1996 (R)	.004	.001	.005
Don Nickles	1996 (R)	.001	.004	.003
Tommy Thompson	1996 (R)	.001	.006	.001
Connie Mack	1996 (R)	.004	.002	.007
Jeanne Shaheen	2000 (D)	.002	.013	.000
Richard Gephardt	2000 (D)	.055	.012	.004
Bill Frist	2000 (R)	.010	.002	.004
George Pataki	2000 (R)	.027	.759	.119
Tom Ridge	2000 (R)	.002	.004	.002
Fred Thompson	2000 (R)	.017	.001	.003
Jeanne Shaheen	2004 (D)	.004	.015	.013

\*Barring only Rockefeller in 1968(D), Ford 1980(R) and McCain in 2004(D), as these were coded as the winners of their respective selection pools, and could therefore not be removed from the dataset.

## 9.2 REPLICATIONS OF MODEL 3

The independent variables political experience pre-1976 and political experience post-1972 correlate highly, and thus might impose a problem of multicollinearity in model 3, which includes both variables. Below, model 3 is replicated twice, each time excluding one of these variables. The results remain fairly unchanged.

Table 8.2 Model 3 without political experience pre-1976

Characteristics of potential ticket	Logit coefficient	Standard error	P-value	Odds ratio
Political experience post-1972	.54	.59	.361	1.71
Size of state pre-1976	1.01	.38	.007***	2.74
Size of state post-1972	-.08	.17	.607	.92
Regional balance pre-1976	1.8	1.64	.275	6.02
Regional balance post-1972	.19	.86	.821	1.22
<b>Model Fit</b>				
Chi2 (5)	18.59			
Prob > chi2	.002***			

\* p < .10 \*\*p < .05 \*\*\* p < .01  
N=168

Table 8.3 Model 3 without political experience post-1972

Characteristics of potential ticket	Logit coefficient	Standard error	P-value	Odds ratio
Political experience pre-1976	-.32	.51	.529	1.72
Size of state pre-1976	1.09	.43	.011**	2.97
Size of state post-1972	-.10	.17	.541	.90
Regional balance pre-1976	2.08	1.78	.243	8.01
Regional balance post-1972	.28	.83	.740	1.32
<b>Model Fit</b>				
Chi2 (5)	18.04			
Prob > chi2	.003***			

\* p < .10 \*\*p < .05 \*\*\* p < .01  
N=168