

## **How to Address the Study of Open Primary Elections: Insights From the Italian Case**

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## Abstract

This case presents the research design used by Candidate and Leader Selection, a standing group of the Italian Political Science Association, for investigating open primary elections held to select candidates and party leaders in Italy. The lack of a legal framework that rules primaries raised several research challenges for studying participation in primary elections and for clarifying the features and attitudes of primary voters. A brief introduction summarizes the main research questions concerning the study of primary elections, providing a theoretical framework and empirical definitions as well. The peculiarities of the Italian case study are then detailed, while the core of the piece is devoted to the research protocol description. In particular, this case presents the research strategies implemented for addressing the study of participation in open primary elections by means of exit polls. In particular, this case details the research procedures adopted for the sampling procedures and the coordination of the research teams at the regional level, the training of interviewers for face-to-face interviews, the drafting of the questionnaire, and the practical solution implemented for administering the survey at polling stations.

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## Learning Outcomes

By the end of this case, students should be able to

- Understand the challenges and difficulties for studying participation in open primary elections when these particular elections lack a register of voters
  - Draft a questionnaire investigating participation in primary elections
  - Organize an exit poll for open primary elections
  - Implement practical solutions for administering the questionnaire at polling stations
  - Train interviewers in administering questionnaires
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This case aims to provide an account of the research strategies carried out by the Candidate and Leader Selection (CLS) team, a standing group of the Italian Political Science Association, for organizing the empirical study of open primary elections for party leader selection ([www.cals.it](http://www.cals.it)).

We conceive the term “primaries” as a cue to highly “inclusive intra-party selection methods,” as Kenig and Pruyers (2018) recently explained. Thus, in line with recent literature, we consider primary elections not only as the internal ballots to select candidates for institutional positions but also selections for internal positions (e.g., the party leader), mostly because in many cases the party leader is also the candidate for the Prime Minister or presidential position (Kenig, Cross, Pruyers, & Rahat, 2016; Ware, 2018).

CLS investigated primaries by focusing on the dimensions of participation and mobilization at the individual and the aggregate levels. At the individual level, CLS focused on the study of the sociodemographic and

political features of primary voters and their strategies in terms of loyalty and defection in the following general election. At the aggregate level, CLS's research aimed to assess the impact of primary participation and competitiveness on electoral performances and membership recruiting. In particular, the research network is committed to studying CLS at the local and national levels by means of exit polls. Since 2005, CLS has organized more than 20 exit polls during primary elections in Italy. In this case, we will offer an overview of the challenges we faced in conducting our research and the solutions we identified while designing the research protocol developed for administering these exit polls at the national level. Most of the examples included in this case come from the data collections organized by CLS for investigating the *Partito Democratico* (Democratic Party, PD) party leadership selections.

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## Project Overview and Context

### Political Parties and Intra-Party Democracy: Why They Are Relevant

The theme of primary elections is crucial for understanding the changes currently occurring within party organizations (Hazan & Rahat, 2010; Scarrow, Webb, & Poguntke, 2017). The spread of these instruments of intra-party democracy could be interpreted as a reaction to the crisis of legitimacy affecting political parties (Ignazi, 2018). Specifically, the introduction of primary elections can be seen as a response to the challenges of antiparty feelings. According to scientific literature, one of the factors that is driving political parties toward intra-party democracy is precisely the attempt to frame their public image within the ideals of democracy, inclusion, participation, and transparency (Sandri, Seddone, & Venturino, 2015). While parties claim to relinquish their control over a crucial phase of the electoral process, such as the selection of their nominees and candidates, party members and sympathizers are invited to have a say in such a crucial decision process within political parties.

Primary elections introduced unprecedented participatory practices that have redefined political parties' internal life. Whether open or closed, primaries offer the possibility of having a say in one of the most crucial decisional processes of a party's internal life: the selection of candidates or even of the party's own leader. This issue is not trivial in times of personalization of politics and, foremost, it is not without risks. As underlined by several scholars, the direct connection between candidates and supporters resulting from the primary vote could endanger party cohesion (Ignazi, 2018). The legitimacy secured by a large electorate could enable nominees to free themselves from the control from the party and its middle-level elites (Katz & Mair, 1994), facilitating the personalization of politics. This idea suggests that primaries deserve a closer examination. Primaries are a complex participative event that could have severe consequences for parties both at the electoral and at the organizational levels.

### Case Study: Italy as a Laboratory for Intra-Party Democracy

Italy appears to be a pioneering example of the use of intra-party democracy procedures and in particular

primary elections, providing an interesting and stimulating case study. Italian primaries are heterogeneous in terms of rules, inclusiveness, and kind of offices at stake (Pasquino & Valbruzzi, 2016). Notably, this variety stems from the absence of a legal framework that regulates primaries. The lack of legal constraints leaves wide discretionary power to political parties, which, by implication, maintain their control over the rules that manage the internal ballot processes and particularly on the rules that govern the candidatures for primaries (such as the requirement of endorsements, the timeline of the primary election process, and the electoral rules). De facto, the devolution of decision-making power from the elites to the grassroots is articulated within a set of procedures that are defined by the parties themselves.

These inclusive procedures have spread among Italian parties quickly (Valbruzzi, 2011). Since 2005, when the left-wing coalition organized an open primary for selecting its top candidate for the 2006 parliamentary election (Venturino, 2007), primaries became a common participative device (Pasquino & Valbruzzi, 2016). To give a sense of the diffusion of these inclusive elections, a detail that is worth recalling is that in 14 years, more than 1,000 open primaries have been organized at the local level for selecting candidates for mayor in municipal elections (Sandri & Venturino, 2016; Venturino, 2017). In few years, primaries have turned into a normal procedure for selecting monocratic candidates at both the national (coalition leaders) and local (mayor, regional president) levels (Pasquino, 2009; Pasquino & Venturino, 2009a, 2009b, 2014; Seddone & Valbruzzi, 2012). Furthermore, inclusive methods have been implemented for appointing party leaders. For example, the PD selects its party leaders through open primaries (Sandri & Seddone, 2015). Yet, closed primaries have also been organized by the Lega Nord (*Northern League*) in 2013 and 2017, when party members were involved in the selection process of the new leader, Matteo Salvini. In addition, a detail that should be underlined is that primaries have been used for choosing candidates to be included into the electoral lists for both regional and general elections (Venturino & Seddone, 2017). A particular case is that of the Movimento 5 Stelle (*Five Star Movement*), which normally resorts to closed and online primary elections for selecting candidates at the local and the national levels (Seddone & Rombi, 2018).

In this case, we focused our attention on the PD internal ballots. The peculiar feature of the PD's primaries is represented by their maximum level of inclusiveness. While closed primaries for selecting party leaders are common among parties in Western democracies and the same applies for open primaries aimed to select candidates, the choice to open the selectorate for party leadership races to sympathizers is quite unusual. Literature on this regard suggests taking in serious consideration the distinction between the selection of party leaders and the selection of candidates (Kenig, Rahat, & Hazan, 2015). The substantial difference of the systemic impact of the two types of primaries is crucial to understand. In the case of inclusive selection of candidates, primaries represent the first step of a broader selection and recruitment process then ends with the general election. Once the nomination has been obtained, the electoral race has just started, and other factors may intervene, such as the challenge of facing external competitors. In any case, the electoral rules play an essential role. In other words, intra-party competition has come to an end and the contest moves outside the organizational boundaries of the party. The inclusive selection of party leadership functions as a full-fledged election. This idea implies that the consequences at the organizational level are immediately visible and relevant. The dynamics of personalization driven by the primary competition in fact affects the

internal relations of the party and just within the party; the newly selected leader obtains a broad legitimation that may entail a marginalization of the party's intermediate structures.

Primaries represent a crucial dimension of the party identity (Pasquino & Valbruzzi, 2017). The very creation of the PD, namely, the merger of the leftist, post-communist party Democrats of the Left (*Democratici di Sinistra* [DS]), and the moderate center-left party La Margherita (The Daisy), was celebrated in 2007 through an open primary election for selecting the first party leader (Bordandini, Di Virgilio, & Raniolo, 2008). Then, the PD resorted to such an inclusive procedure to symbolize a real rupture with the past. By offering new participatory instruments, the PD aimed to launch a new organizational model where party members and unaffiliated supporters share similar powers and rights when selecting candidates and the party leader. PD's primaries are extremely inclusive. The participation is granted to a body larger than the electorate, as both underage citizens over 16 years old and foreign citizens formally registered may participate.

In selecting its party leader, the PD adopts a multi-stage procedure where the open primary is preceded by an internal vote with only party members participating with the specific aim to select up to three candidates. The latter will run for the open primary, where party members and sympathizers share the same rights and powers (Venturino, 2015).

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## Research Design

### Research Questions

Investigating the processes and consequences of the PD's open primaries is clearly relevant for advancing knowledge on political sociology and also challenging. Given the absence of a national register of primary voters, considerable difficulties arise for measuring the participation rate in these ballots. Similarly, accessing information about the sociodemographic features of primary voters is difficult. Moreover, the private nature of Italian open primary elections, which are regulated, financed, and run by parties, implies recurrent and frequent changes in their regulation, thus jeopardizing—or at least overcomplicating—our attempts to provide longitudinal comparisons.

As underlined above, this piece will focus in particular on the data collection carried out through exit polls. Exit polls are surveys of a random sample of voters administered after they leave their voting location. Unlike an opinion poll, which asks for whom the voter plans to vote or some similar formulation, an exit poll asks for whom the voter actually voted. When, in 2005, the first open primary was organized by the center-left coalition to select the PM candidate, researchers, journalists, and analysts were groping in the dark. Apart from the American experiences of the presidential primaries, the theme was utterly unknown to the public debate. Basically, what one should expect from these “strange” elections was unclear. Closed primaries had already been adopted by some political parties, but this time was different because both party members and sympathizers were allowed to participate, and no national register of eligible voters was made available.

In that initial phase, we were interested in collecting information about the primary voters' sociopolitical features and in particular to clarify what happens after the primary elections. This latter issue is usually approached in U.S. literature by considering losing selectors' strategies (Kenney, 1988; Southwell, 1986). Basically, the aim is to explain whether they would be loyal to the nominee despite the defeat of their preferred candidate in primary elections. Losers supporting a non-viable candidate in the first stage miss their favored candidate in the second stage. Thus, at the general election, they need to adopt an alternative behavior. They may choose to support as second best the nominee fielded by their party, to vote for a candidate fielded by a concurrent party, or to abstain. These were the research questions that guided our first empirical research and the design of our protocol:

**Research Question 1:** *What is the voters' sociopolitical profile of Italian open primary elections?*

**Research Question 2:** *How do primary voters react in case of the defeat of their candidate? Do they tend to be loyal to the party? Or do they opt for abstention or vote for another party?*

That is why we decided to collect individual-level data through surveys. The question was how to adapt traditional survey methods to the specificities of primary elections' exit polls in the Italian case, taking into account the lack of public general regulation and of information on the universe of the analysis.

To answer these questions, a pilot study was conducted. The pilot study involved organizing an exit poll in a sample of 20 Italian regions, where trained interviewers administered a brief questionnaire. The pilot study has been crucial for further developing and fine-tuning the methodology we used in the following years. If the results of the questionnaires were interesting and helped provide a clear idea about the participation in primary elections, then the real problem was to obtain a broader coverage nationwide. Therefore, as a first step, we built a connection with scholars in all Italian regions. Over the years, more than 35 scholars joined our research group and collaborated in the fielding of the exit polls. They were asked to coordinate the data collection locally by recruiting interviewers among master's students. Around 70 interviewers were recruited for each fieldwork in 2007, 2009, 2013, and 2017 and managed by each of the 20 regional coordinators. The latter was in charge of the training concerning the administration of face-to-face questionnaires and the data entry, as well as for the logistic organization of the survey (i.e., choosing the polling stations, providing materials for interviewers, getting in touch with party officials). The national coordinators of the research were responsible for drafting the standardized questionnaire, the sampling, and the production of the final dataset.

## Sampling Selectorates in Open Primaries: A Tricky Problem

Collecting data at the individual level through exit polls presents some considerable methodological challenges, especially in the case of primary elections. The difficulties are related to the drawing of probability samples that are representative of the target population. In the case of open primaries, this issue may be tricky. To begin with, we cannot rely on a list of registered voters to design a randomly selected sample, and a register of voters who participated in previous primaries is unavailable. Accordingly, even defining the universe to be sampled raises some serious issues.

With regard to the four party leader selections organized by the PD between 2007 and 2017, the frame population corresponds to the electorate of the party (plus the population over 16 and foreigners regularly registered residing in Italy). However, voters of other parties are also entitled to participate. Therefore, considering the party's electorate in the previous election covers only part of the target population. Accordingly, the CLS research group chose to use the whole resident population aged 16 and over to define the sample for data collection.

One could suggest that a computer-assisted telephone interviewing or computer-assisted Web interviewing survey just after the primaries could easily solve any of these problems. However, we are aware that the costs of the survey would increase substantially with a reasonably large quota of primary voters, allowing for sophisticated multivariate analyses. Also, relying on an opinion poll survey administered after the primary race could be misleading, as primary voters tend to overreport the vote for the winner (Atkeson, 1999). Moreover, U.S. literature suggests that exit polls are more reliable tools for investigating selectors' attitudes and opinions (Geer, 1988; Hirano, Snyder, Ansolabehere, & Hansen, 2010).

The lack of registers for primary voters leads to the construction of a non-probability sample. The sample is inevitably biased as a consequence of the constraints imposed by the cost of data collection and non-sampling errors (see Groves, 1989, pp. 246–247). Nonetheless, the number of completed questionnaires collected per each exit poll is quite high (2007:  $n = 3,143$ ; 2009:  $n = 3,246$ , 2013:  $n = 3,502$ ; 2017:  $n = 3,554$ ). Recent studies have shown that online non-probability surveys bear considerable advantages, especially if compared with face-to-face or telephone probability surveys, which also suffer from coverage biases (Dassonneville, Blais, Hooghe, & Deschouwer, 2018). Also, the differences between probability and non-probability samples in the field of electoral research seem to be quite modest when focusing on inferences and explanatory models. We consider that our data can be used for explorative analyses on political participation in internal party ballots, even though any generalization of the results to the whole population of party members and voters of the selected party would need to be elaborated cautiously.

In accordance with the 2005 pilot study and to the several exit polls organized at the local level since 2007, we set 3,500 interviews as the optimal quota that offers an adequate sample size for analyzing participants. A total of 3,500 questionnaires were distributed proportionally per each region based on two criteria: the resident population and—given that we are studying primaries for the party leadership—the aggregate figures per region concerning participation in the last primary election for the leadership. In the second step, the quota of questionnaire assigned per region is divided proportionally according to the number of residents in major cities (provincial capitals, *capoluoghi di provincia*) and small towns.

Having defined the number of questionnaires to be assigned per each region, the polling stations to be covered are identified by a convenience logic. In particular, they are chosen according to the party performance in previous elections in the given constituency, including both voting stations where the party scored high and others in which the party suffered a defeat. We are aware that this procedure does not allow for generalization because no criterion of random selection of polling stations is applied. However, one should consider that this kind of research protocol is conducted by covering only the costs of printing questionnaires.

Even if randomly selecting the polling stations is possible, covering the travel expenses for all the students/interviewers is implied, which was not feasible given the small financial grants allocated to our research group. All the manpower involved in designing and fielding the exit polls worked, and is still working today, on a voluntary, unpaid basis.

In our experience, to ensure the quality of data, the interview length is about 5 min. Therefore, given that we are not relying on professionals, each interviewer is assigned a maximum of 40 questionnaires to be administered at each polling station covered. Accordingly, once the questionnaires are assigned per each region, the number of interviewers needed can be calculated. Interviewers are required to stay at the polling station the whole day, distributing the assigned survey equally in the morning, afternoon, and evening. Primary voters are interviewed as they exit the voting station and their involvement is voluntary and anonymous.

## The Questionnaire

The questionnaire is organized in different sections. It has changed considerably over the years, with some questions being integrated or dropped. For the sake of simplicity, we outline the questionnaire by presenting the core questions that were included in all the data collections conducted since 2007.

The first section aims to collect information about the sociodemographic features of primary voters. To this aim, questions investigating (a) age, (b) gender, (c) education, (d) professional position, and (e) religion were included.

The second section of the questionnaire concerns the political attitudes of the respondents. More specifically, the set of dimensions focuses on the following:

- (a) Interest in politics: This is measured by a scale ranging from 1 to 10: *On a scale of 1 to 10, how interested are you in politics? (1 means “not at all”; 10 means “a lot”).*
- (b) Ideological positioning: *Many people use the terms “left” and “right” when talking about politics. Thinking about your political beliefs, where would you place yourself?*

Any question investigating abstract dimensions, such as ideological positioning, could be challenging for respondents. To facilitate the understanding of the question and the responding process, interviewees were allowed to see the graphical representation:

A	B	C	D	E	F	G	H	I	L
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The interviewer shows a scale where letters from A to L are listed, asking the respondents to place their ideological positioning within this continuum scale; “A” corresponds to the far left, while “L” corresponds to the far right.

We decided to use letters instead of numbers to avoid any misleading answer. Indeed,



during the pilot studies conducted for testing the questionnaire, we observed that when asked to identify their ideological positioning on a scale ranging from 1 to 10, respondents tended to misunderstand the question. The 1 to 10 scale is applied as the grading system by the Italian education system in high school, where 10 represents the maximum grade. Therefore, when exposed to the 1 to 10 scale, respondents simply tended to interpret it as an intensity measure of their ideological beliefs. Resorting to a list of letters allows us to avoid this misunderstanding. Letters are recoded into numbers from 1 to 10 (A = 1; L = 10) during data entry.

- (c) Sources of information: *Where did you collect information about this primary election?* The following answer categories were offered: *candidates, party branches, unions, associations, newspapers, the Internet, TV or radio, friends or colleagues, familiars, and campaign flyers*. The main source of information and up to two further sources are registered.

The third section of the questionnaire investigates the political and electoral attitudes of the respondents, focusing on the following dimensions:

- (a) Party membership: *Are you a PD party member?* Respondents are allowed to choose between two categories, namely, *yes* or *no*.
- (b) Voting behavior: *Which political party did you vote for in the last parliamentary elections?* The list of parties is provided.

The final section is aimed at collecting data about the attitudes toward the primary competition. The questions are mainly related to the following:

- (a) The candidates' evaluation: *On a scale of 1 to 10, how much do you like each of the candidates running in this primary election? On this scale, 1 means "I dislike him or her very much," whereas 10 means "I like him or her very much."*
- (b) Voting motivations: *What is your main motivation for voting for the candidate you supported in this primary election?* The following set of response options was provided: *"The candidate represents my political values," "I endorse his or her project for the party," "I appreciate his or her personal characteristics," "I want someone who is capable to win the next general election."*
- (c) The strategy in case of defeat of the preferred candidate: The question is worded as follows: *"In case your candidate does not win this primary competition, what will you do in the next general election?"* Respondents were asked to choose among these options: *"I will support my party no matter the result of the primary elections," "I will vote for another party/candidate,"* and *"I am still unsure about how to react."*

Finally, the respondents were asked to repeat the vote they just cast.

The questionnaire is designed to be administrated face-to-face; therefore, questions are read aloud by interviewers. Only the last question concerning the vote cast in the primary election is required to be filled directly by respondents on the paper questionnaire without any interference from the interviewer. Respondents are provided with a pen, and they could repeat their vote autonomously and privately. After that, they are asked to place the questionnaire in a ballot box.

The questionnaire should include the logo of the university that coordinates the data collection at the local level and the names, email, and telephone references of the regional coordinators.

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## Research Practicalities

### Training Interviewers

Interviewers are usually recruited among university students and do not receive any payment for their service. Regional coordinators are in charge of the training. For this process, they rely on standardized documents provided by the national coordinators. Materials include (a) a document reporting the main information about research design, a general explanation of the questionnaires, and their items; (b) a document that includes instructions for administering the surveys and instructions for the data entry; (c) the questionnaire; and (d) a standardized Excel file for data entry. Local coordinators provide a 6-hr short course where issues about questionnaire administration and data entry are addressed.

We are well aware that involving students we purposely rely on non-professional interviewers. However, we underline that through this kind of activity, students are socialized to empirical research and are also enabled to test the skills they acquired during lectures and seminars through practical experience. In the case of students of classes focusing on research methods, this kind of activity is particularly appropriated, fostering the learning process.

### Before the Survey

At least 1 week before the primary vote, the regional coordinators have to define the list of recruited students and send it to the national coordinators. They have to include the following details:

- (a) Region,
- (b) City,
- (c) Polling station covered,
- (d) Name,
- (e) Email contact,
- (f) Mobile phone contact.

Regional coordinators should also provide interviewers with

- (a) a badge reporting their names and the university logo,
- (b) a closed ballot box with the university logo,
- (c) the paper questionnaires assigned to each interviewer, and
- (d) flyers and information material.

## After the Survey

As anticipated above, aside from administering questionnaires, interviewers are asked to electronically code the collected data into an Excel file.

Given that the collected data are typically used to produce reports to be distributed to the media, interviewers should be able to input data in a short time. The deadline for sending the data is set at 10:00 p.m. of the same day of the primaries (the polling stations usually close at 8:00 p.m.). Once the data entry process is finalized, the national coordinators have to merge, clean, and check the data during the night to have a final dataset and preliminary analyses by the next morning.

This process is particularly important. During the training session, at least 1 hr is devoted to test the data input processes. The Excel file is presented and discussed, then the manner by which the interviewers have to organize the data entry is explained. First, they are asked to assign an ID to each questionnaire, meaning they number each questionnaire progressively. Afterward, they can proceed with the data input. This approach makes tracing back and solving coding mistakes possible. The interviewers use a codebook specifying the correspondence between questions and variables and how the categories associated with each question are translated into numerical values. As an example:

*Question: What is your education level?*

*Variable name: V01—Education*

*Categories: 1 = Elementary school, 2 = Middle school, 3 = High school, 4 = University.*

Once the data have been entered into the Excel file, the interviewers are asked to send their datasets to the regional and national coordinators by email.

National coordinators are in charge of composing the final dataset. They merge the single files from each polling station by checking for possible mistakes in data entry. Basically, they verify that values correspond to those assigned to the response categories within the questionnaire. For this reason, interviewers have to be available on their mobile phones in case the national coordinators need any clarifications in the event of non-pertinent values reported into the dataset.

Once the final dataset is defined, it is exported into SPSS or STATA and is ready for variable labeling and analyses.

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## Method in Action

From a practical point of view, organizing this kind of data collection nationwide could be complicated. In our experience, problems could come mainly from bad communication with party officials organizing the primary election.

To improve the quality of the data collection and avoid difficulties during the administration of the questionnaire, the local coordinators of the exit poll need to get in touch with party officials at the regional level. Usually, they are asked to approach them at least 6 weeks before election day to present the research and explain the procedure of the exit poll. They should ensure that the data collection does not interfere with the voting process. Therefore, interviewers should be positioned outside the polling station.

We also noticed that usually both party officials and primary voters respond positively to the involvement of local universities. The idea of being part of a research endorsed and organized by an academic institution makes them willing to participate and therefore they answer the questionnaire easily. Thus, the badge and the ballot box provided to interviewers should display the university logo. In addition, given that primary voters often stand in line while waiting to answer our survey, information materials (such as flyers) should be provided and distributed to respondents while they wait. The document should clarify the aims of the research and include the references of local and national coordinators (emails and mobile phone numbers).

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## Practical Lessons Learned

Generally, our exit polls have been particularly effective in predicting the primary race results. From a scientific point of view, despite the issues concerning the non-probabilistic sample, the quality of the collected data is usually high and the sample is representative of the whole population. However, some criticisms can be raised. We report below some of the most relevant problems we encountered during our experience with exit polls during primary elections.

First, interviewers should avoid talking with party staff and organizers during the data collection process by giving them hunches about the voting results. Out of natural curiosity, party organizers approached some interviewers at the polling stations, asking them to provide some information about the data they collected. These party organizers were interested in the possible outcome of the election. Given that interviewers are not allowed to see the vote expressed by the questionnaire respondents, any reply to this question is merely based on personal guesses. However, because we do not rely on professional interviewers, students could be tempted to engage in this discussion with the risk of causing trouble among party officials at the polling station. This situation has actually happened in a few cases. Thus, we suggest specifying during the training that providing any kind of information about the exit poll results is not allowed, and engaging with journalists or media in general is strictly prohibited.

Second, we noticed that our data presented a high proportion of party members voting in primary elections. In principle, this situation is not surprising. Clearly, party members are the most mobilized group in this kind of event. Yet, we became aware that some interviewers who wanted to complete the data collection as

quickly as possible tended to administer the questionnaires to the party officials who are overseeing the voting process at the polling station. Usually, a representative of each candidate is present at the polling station, along with an independent party official overseeing the functioning of the voting process. At least four party officials are in charge of overseeing the procedure in each polling station. Thus, if they are surveyed in each polling station covered by the exit polls, the data could overrepresent party members. Therefore, we explicitly ask interviewers not to administer questionnaires to party officials working at the polling station during the voting process.

Third, even if the data collection proceeded smoothly, failing to properly communicate with party officials ahead of election day could negatively affect the data collection process. In one instance, party officials working at a given polling station were not aware that data collection supported by the regional party bodies was going to take place. To avoid this problem, we asked interviewers to get in touch with the party officials responsible for the assigned polling station at least 3 days before the primary election to inform them about our research. This is basic etiquette, but it is essential for running the exit polls efficiently.

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## Conclusion

Investigating the PD's open primary elections is not an easy task. Difficulties arise in relation to the unspecified size and features of the examined population. Who is entitled to vote in the primary elections? In the case of the open primaries organized by the PD to select its party leader, the researcher could not rely on a register of voters. This situation means that no previous information for defining a probability sample is available, much less for elaborating a stratification of the population for drawing a sample. Exit polls are the most reliable solution for acquiring information about participants and their attitudes. We have learned much since 2005 when we started this research by analyzing primaries for selecting candidates at the local and the national levels. In particular, we noticed that, to properly organize a study like this, what matters is coordination, the relationship between national and local organizers, and the quality of training provided to interviewers. Most of the problems we experienced were due to miscommunication.

On one hand, national coordinators should ensure the cohesion of the nationwide network of researchers, involving them in each phase of the research, from the distribution of questionnaires at the local level to the drafting of the questionnaires—discussing with them every single item and their wording—to the training of interviewers. On the other hand, local coordinators have to handle contact with the party officials carefully. They must be aware that the quality of the data collection depends on a good relationship with the party who is organizing the primary elections. Communications have to be clear and complete. Most of all, materials need to be prepared far in advance.

We are aware of the shortcomings of our research protocol. However, we are also aware that it is a reliable tool for addressing the study of participation in primary elections when the inclusiveness of the selection and the lack of legal framework do not provide information for designing a probability sample.

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## Exercises and Discussion Questions

1. What are the main challenges in studying open primary elections through opinion polls?
  2. Why do exit polls help in better addressing the investigation of participation in open primary elections?
  3. With regard to the questionnaire drafting, how could misunderstanding of questions concerning the ideological positioning of the respondents be solved?
  4. Why is coordinating interactions with the national party officers in charge of the organization of the primary race important?
  5. What kind of materials should be provided for training interviewers?
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## Further Reading

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## Web Resources

[www.cals.it](http://www.cals.it)

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