

Social Movements and Elections: An Examination of Select 21st Century Movements

by

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A dissertation submitted in partial
fulfillment of the requirements for the degree
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ABSTRACT

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Abstract

In two-party, majoritarian systems like the United States, partisan voters are between a proverbial “rock and a hard place” when they find themselves dissatisfied with the “handling” of an issue, and by extension, find themselves dissatisfied with their own party. How then, can partisan voters signal dissatisfaction with their party, particularly considering the nationalized state of US politics? One possible answer lies with social movements. Social movements are collectivities, typically of substantial size, that engage in sustained conventional and non-conventional activity against elites and elite institutions to effect shared goals for change, usually in policy or society broadly (Opp 2009; Tarrow 1998; Klandermans 1997; Katz 1971). Social movements afford dissatisfied individuals a means of collectivizing to express their grievances, and, with some small probability, an opportunity to obtain substantive change.

Thus, social movements, through their varied modes of action, are a means of exerting pressure on elite political actors to address issues that are not being adequately handled or are being handled in a manner that does satisfy a critical mass of the public (Rohlinger & Gentile 2017; Smelser 1962). Movements will sometimes utilize sanctioning repertoires such as electoral mobilization, most clearly observable through the primarying of members of the party that should be or is perceived to be aligned with their interests.

To explore this relationship between movement-candidate emergence and voter support for social movements, I focus on the Tea Party during the 2010 midterm election.

The legislative landscape of the House of Representatives experienced a massive shift in 2010; 63 seats changed hands from the Democrat to Republican party. In a time where the public was displeased with the state of the nation, the grassroots Tea Party movement caught fire. The Tea Party supported a conservative social agenda and economic policies focused on cutting programs. As the movement gained national attention, many political hopefuls began to associate themselves with the Tea Party. Is this an example of a movement succeeding in the difficult-to-penetrate American electoral system? Despite the very visible splash made by the Tea Party, I argue that Tea Party affiliation provided challengers no greater probability of defeating the incumbent in general or Republican primary elections, and instead seek to demonstrate that prior political experience is the trait critical to electoral success.

The long-standing literature on incumbency advantage and their relationship to quality challengers would suggest that the institutional barriers are simply too high for a social movement to surmount, particularly in this instance where movement-candidates couched themselves within the Republican party and thus lacked any Tea Party identifying information on the ballot. In examining an original, comprehensive dataset, I look first to the general election, where I find support for my expectations. In the primary, my findings are more mixed; I find that Tea Party candidates – but only those who are also quality candidates – are able to significantly reduce incumbent vote share, but not enough to affect the overall probability of reelection.

Given that this most visible recent movement was unable to significantly alter outcomes in the electoral sphere, the next “insurgent group” I investigate is women. The 2018 midterm elections were lauded as the “year of the woman”. While no single social movement emerges to rally female candidates to the ballot (though the presence of Women’s March organizations remain throughout this period), we observe an outsized increase in the number of women candidates, with many individual women citing the political climate and the policy choices of then-president Donald Trump as the catalyst for their run. The midterms of 2018 also offer another example of a moment in time where the public was deeply dissatisfied with the state of American political affairs and a sizable number of citizens decided to do something about it.

With my coauthors, we assess how women candidates fared in 2018 using the literature of supply- and demand-effects to investigate the extent to which these women were successful in using their grievances to attain office. We find that women candidates approached supply-side parity, and that the factors predicting the emergence of such candidates were consistent with those in the literature. However, we find that this healthy supply of candidates did not translate into winning elections at rates we would expect, suggesting demand-side explanations for candidate underrepresentation greatly affected the 2018 elections, particularly among Republicans. We close with a discussion of the implications of our findings for the study of female candidates in congressional elections.

Finally, in an effort to extrapolate from these findings, I draw on theories of both social identity and social movements to develop a theory of social movement identity and

outline expectations about the relationship between the strength of politically salient identities and electoral participation. Using two original surveys and an adaptation of the Huddy et al. (2015) identity instrument, I demonstrate the reliability and internal consistency of the instrument, find clear support for the existence of a social movement identity, and evidence for a relationship between identity strength and political participation. With this project, I've taken the first steps in exploring the demand for social movement candidates amongst a sample of the American public.

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1. Power of the Party? The Influence of the Tea Party Label in the 2010 House Elections

1.1 Introduction

In 2006, the Democratic party capitalized on the failings of the Republican party, — an unpopular continued presence in Iraq, an ineffectual response to Hurricane Katrina, and multiple ethics and personal scandals — reclaiming majorities in Congress after an extended period of Republican control (Hershey 2013). Strategically running moderate candidates in swing districts, the 2008 elections gave Democrats not only the presidency but stronger control of both chambers of Congress (Dodd and Oppenheimer 2013, Karpowitz et al 2011). The early months of the 111th Congress were consumed with responding to the financial instability that America was facing after the failure of several large banks and the crash of the housing and stock markets in late 2008. Democrats worked to secure the votes needed to pass President Obama's \$787 billion stimulus bill and the campaigned-upon middle class tax cuts (Dodd and Oppenheimer 2013). Despite the Democrats' better efforts, the economy remained mostly stagnant through 2010.

The Patient Protection and Affordable Care Act, a landmark piece of legislation granting universal healthcare to citizens, was signed into law by President Obama in March 2010. However, public opinion toward the bill was ambivalent at best in a nation plagued by economic anxieties and fear of unemployment; evidence suggests that Democrats representing swing districts received lower vote shares in the midterm as a result of casting their vote for the ACA (Aldrich et al 2013). This marked the beginning of the end of any bipartisan efforts in the 111th Congress (Dodd and Oppenheimer 2013).

Republicans consistently attempted to block Democratic legislative efforts for the rest of 2010. Bills regarding finance-industry regulation, environmental protections, immigration, and taxes were all met with resistance from the Republican bloc. Despite being one of the most active lame duck Congresses in history, public approval of both President Obama and the Democrats plummeted (Gallup 2010, Aldrich et al 2013); this created favorable conditions for the Republican party heading into the 2010 midterms (Kernell 1977, Healy & Malhotra 2013). Republicans, aided by conservative lobbying groups, used the economy and the policy achievements of the 111th to foment discontent among the public and build anti-Democrat sentiment for the 2010 midterm elections (Dodd and Oppenheimer 2013, Aldrich et al 2013, Jacobson 2011).

The Tea Party was thus born of the sharp economic downturn that occurred in late 2008. Despite the average Tea Party supporter being less affected by these events than the average American (Skocpol and Williamson 2012), Tea Party ideologues came out in droves in early 2009 to protest Obama's and the Democratic 111th Congress's response to the crisis. Another major spark that lit the Tea Party torches was the on-air outburst of CNBC commentator Rick Santelli, who called for rebellious action reminiscent of the Boston Tea Party of Revolutionary days gone by.

The Democrats, by virtue of their strong hold on both chambers going into the 2010 midterm elections, had more seats to defend than Republicans, particularly in swing districts where more moderate Democrats had run previously (Dodd and Oppenheimer 2013). This coupled with low approval ratings made challenging a Democratic incumbent for office more enticing to quality candidates (Hetherington and Keefe 2007). Moreover,

midterm voter turnout is low, typically below forty percent (Hetherington and Keefe 2007); those that do turnout are more likely to be white, older, and wealthier than voters that turn out in presidential election years (Hershey 2013). These demographics tend to favor the Republican party as well as the Tea Party movement (Skocpol and Williamson 2012, Jacobson 2011).

1.2 Background

1.2.1 Incumbency Advantages

Since the 1960's, incumbents in the House have experienced average reelection rates of 93%, fluctuating as high as 98% and as "low" as 87% (Hershey 2013, Hetherington and Keefe 2007). This fact unsurprisingly discourages quality candidates from challenging incumbents who appear to be rather safe in their districts. Adding to the notion of "safe districts" is the fact that ideological self-sorting on the part of the electorate (caused by the increasing mobility of voters) truly has created a large number of safely-Republican and safely-Democratic districts (McCarty, Poole, and Rosenthal 2009), leaving fewer contested districts in which quality candidates might challenge an incumbent. The literature would lead us to expect that quality challengers should emerge against Democrats in the general election and target weak Republican incumbents or open seats in the primary election.

Incumbents hold a variety of distinct advantages, but these can be ameliorated by the challenge of a quality candidate. Incumbents garner extra votes in the voting booth by a phenomenon as simple as name recognition. Greater amounts of media coverage serve to further the name recognition advantage and moreover increase opportunities to remind

voters about the services and “pork”, or funding, that they have already brought back to the district (Hershey 2013, Hetherington and Keefe 2007, Pew 2010). Ease of fundraising, having an experienced staff, previous experience with running a campaign, and access to voters through franking privileges (the ability to send communications to constituents with government rather than personal funds) are among the other benefits incumbents enjoy (Hershey 2013, Hetherington and Keefe 2007).

1.2.2 Quality Candidate Characteristics

According to Canon (1990), less experienced candidates emerge in periods of electoral opportunity. This offers a plausible explanation for the high number of non-quality Tea Party candidates who emerged in the 2010 midterm elections but performed poorly. Prior political experience distinguishes individuals as competent candidates in high stakes elections. It also provides resources in campaigning that non-quality candidates do not possess (Mackenzie 2015). The resources of quality candidates are similar to those of incumbents – some degree of name recognition, media attention, experience with running a campaign, access to donors and other fundraising resources, previous office accomplishments, etc. (Jacobson 1989). From this literature, we arrive at the following hypotheses.

H_{1a}: Facing a quality challenger will have a significant negative effect on the probability of incumbent reelection in the general election.

H_{1b}: Facing a quality challenger will have a significant negative effect on the probability of incumbents’ reelection in the primary election stage.

Bianco (1984) writes on quality candidates as well. He states that the probability of a quality candidate running increases as support for the candidate's party in his/her district increases. When the incumbent is being challenged by a quality candidate from the opposite party, the probability that the quality candidate runs is inversely proportional to the level of electoral support for the incumbent. Quality candidates are thus more like to emerge and challenge incumbents during periods when conditions are in their favor. This can be when the incumbent did poorly (achieved less than sixty percent of the vote) in the previous general election, in swing districts where the president received lower vote shares, or when the incumbent (who represents the opposing party of the quality candidate) is experiencing low approval ratings (Hetherington and Keefe 2007). Thus, we can expect quality candidates to emerge in open seat general elections and in open primaries (either those where the Republican incumbent retired or the seat is held by a Democrat meeting one of the above criteria).

H_{2a}: Being a quality challenger in general election open seat races will provide a significant positive effect on probability of winning the seat.

H_{2b}: Being a quality challenger in primary election open seat races will provide a significant positive effect on the probability of winning the seat.

1.2.3 Primaries

Per Boatright (2014), ideological challengers have become more common since the 2000's, especially in the Republican party. However, "there is no evidence that primary challenges are successful either in replacing incumbents or in bringing about change in incumbents' behavior." Similarly, the Brookings Institute Primaries Project

finds that, overwhelmingly, incumbents continue to win their primary challenges; however, they do add that Republicans are winning by slightly smaller margins than a decade ago. If incumbents are continuing to win consistently, it follows that Tea Party challengers are not winning at higher-than-expected rates.

H_{3a}: Facing a Tea Party challenger will not have a statistically significant effect on the probability of incumbent reelection in the general election.

H_{3b}: Facing a Tea Party challenger will not have a statistically significant effect on the probability of incumbent reelection in the primary election stage.

Moreover, due to the nature of first-past-the-post single member districts in the US, Tea Party affiliated candidates strategically couched themselves within the most ideologically similar establishment party (Riker 1982), the Republican party. To the extent that establishment party leadership embraced these social movement candidates, some challengers may have been able to obtain resources through the party. However, a challengers' Tea Party affiliation was not listed on the primary ballot, thus obscuring the signal by which the Tea Party candidates sought to distinguish themselves from the establishment, particularly for low-information voters.

H_{4a}: Being a Tea Party affiliated candidate in open seat races will not have a statistically significant effect on the probability of winning a seat in the general election.

H_{4b}: Being a Tea Party affiliated candidate in open seat races will not have a statistically significant effect on the probability of winning in the primary election stage.

1.3 Data Collection

To explore these questions, I compiled an original dataset on candidates and election outcomes, as well as various district-level demographic variables that will serve as controls. I define prior political experience as having previously held elected office at any level of government. As such, individuals who have served as political aides or in appointed positions are not coded as having prior political experience. Incumbents listed in the dataset are those who held office at the start of the 111th Congress. Individuals who won special elections to replace Representatives that were appointed to offices in the Obama administration are not included in the dataset. Tea Party affiliation, another binary variable, is based on a broad internet search of candidate websites, newspaper articles, and conservative blogs.

General election candidate data was gathered from the *Almanac of American Politics 2012* (Barone and McCutcheon 2011) via a web script using R. Additionally, half of the dataset was coded by hand to verify the accuracy of the scraped data. Data was collected on the following categories: candidate name, party, Tea Party affiliation, prior political experience, percentage of vote won in general election, and whether the candidate is running for an open seat or against an incumbent. Using *Politics in America 2012* (Bicknell, Meyers, and Layman-Wood 2011), I collected data on a proxy variable for district ideology, vote percentage received by Obama in 2008. Using the 2010 edition of *Politics*, I collected information on each district's current incumbent, incumbent's party, and incumbent's vote percentage in 2008, and using the roll call database recorded

how incumbents voted on several divisive pieces of legislation including the stimulus and healthcare bills.

For analysis of the Republican primary elections¹, challenger data for candidates finishing in the top three was collected on the following categories: candidate name, percentage of vote and vote count won in primary election, Tea Party affiliation, prior political experience, and whether the candidate is running for an open seat or against an incumbent. Candidate name, vote measures, and seat status were collected from *CQ Almanac*; the remaining measures were collected from a broad web search of candidate websites, newspaper articles, and conservative blogs. As in the general election data, I used *Politics in America 2012* (Bicknell, Meyers, and Layman-Wood 2011) to collect data on vote percentage received by Obama in 2008 and the 2010 edition of *Politics* to collect information on each district's current incumbent, incumbent's party, and incumbent's vote percentage in 2008. Finally, I collected data on the type of primary utilized in each district: open, semi-closed, closed, top-two.

1.3.1 Limitations

There are a handful of abnormalities and limitations from compiling this original dataset. There is a lack of data available on the representative for Oregon's 1st district in the source materials referenced, so it is excluded from analysis. The Florida 21st is also excluded as the lead Republican competitor for the open seat is a sitting incumbent from

¹ I include districts where a Democratic incumbent currently holds the seat as open seat Republican primaries given there is no incumbent for Republican primary candidates to challenge.

the Florida 25th; characterizing this individual as a quality challenger would be inaccurate. Finally, I exclude the Alabama 5th from the incumbent analyses as the incumbent, Parker Griffith, switched his party affiliation from Republican to Democrat. Complete information on losing candidates was not wholly available in the scheme of my available resources; where it was not possible to determine prior political experience for a candidate, analysis designated that candidate as not having prior political experience (0). Given no independent candidate won a general election contest and given the lack of available personal information on independent candidates in the 2010 House elections, independent candidates running in the general election are not included in the dataset either.

Table 1: N-tables with the breakdown of congressional candidates , by election stage, quality challenger, and Tea Party challenger status.

| General Election - Incumbent Present | | | | General Election Open Seats | | | |
|--|-----------------------|-----|-------|-------------------------------|-----------------------|-----|-------|
| Quality Challengers | Tea Party Challengers | | Total | Quality Challengers | Tea Party Challengers | | Total |
| | 0 | 1 | | | 0 | 1 | |
| 0 | 247 | 87 | 334 | 0 | 35 | 12 | 47 |
| 1 | 62 | 36 | 98 | 1 | 35 | 13 | 48 |
| | 309 | 123 | 432 | | 70 | 25 | 95 |
| Republican Primary - Incumbent Present | | | | Republican Primary Open Seats | | | |
| Quality Challengers | Tea Party Challengers | | Total | Quality Challengers | Tea Party Challengers | | Total |
| | 0 | 1 | | | 0 | 1 | |
| 0 | 105 | 47 | 152 | 0 | 241 | 212 | 453 |
| 1 | 1 | 2 | 3 | 1 | 83 | 46 | 129 |
| | 106 | 49 | 155 | | 324 | 258 | 582 |

1.4 Analysis

To examine the effect of Tea Party and quality challengers in the 2010 general election, I use a Heckman selection model. Selection is based on whether the incumbent chooses to run for reelection, and I model that self-selection decision as a function of the incumbent's age, their previous performance, and whether the incumbent is affiliated with the Democratic party.

Table 2: Selection model estimating the likelihood of incumbent reelection , given an incumbent's decision to run for reelection

| General Election – Incumbent Reelection | | |
|---|----------------------|----------------------|
| | Incumbent Wins | Incumbent Runs |
| Age | | −0.002 (0.008) |
| Vote Share ('08) | 0.0001 (0.0004) | −0.001 (0.0004) |
| Vote Share Obama ('08) | 0.011*** (0.002) | |
| Democrat | −0.394*** (0.144) | 0.217 (0.162) |
| Quality Challenger | −0.318*** (0.043) | |
| Tea Party Challenger | −0.053 (0.039) | |
| Voted No - Obamacare | −0.024 (0.067) | |
| Constant | 0.610 (0.480) | 1.2864*** (0.474) |
| Observations | 432 | |
| ρ | −0.766 | |
| Inverse Mills Ratio | −0.244 (2.016) | |
| <i>Note:</i> **p<0.05; ***p<0.01 | | |

The second stage of the Heckman model regresses the binary outcome variable, whether the incumbent wins, against the incumbent's previous performance, the district

vote share received by Obama, Democratic status, whether the incumbent faces a quality challenger and/or a Tea Party challenger, and how the incumbent voted on the Affordable Care Act. In support of **H1a**, facing a quality challenger has a significant, negative effect on incumbents' chance of reelection. The effect of facing a Tea Party challenger is statistically insignificant, in support of **H3a**. Status as a Democrat also decreases the likelihood of reelection as expected given the down-ballot effects of Obama's low approval rating, though the variable reflecting vote share for Obama conflicts with this finding, given the statistically significant, positive coefficient.

Table 3: Probability Challenger Wins in Open Seat General Election Races

| General Election – Open Seat Races | |
|------------------------------------|----------------------------|
| | <i>Dependent variable:</i> |
| | Challenger Wins |
| Quality Challenger | 1.361*** (0.506) |
| Tea Party Challenger | 0.931 (0.607) |
| Quality Opponent | −1.878*** (0.520) |
| Tea Party Opponent | −1.244 (0.643) |
| Constant | 0.042 (0.478) |
| Observations | 95 |
| Log Likelihood | −48.702 |
| Akaike Inf. Crit. | 107.404 |
| <i>Note:</i> | **p<0.05; ***p<0.01 |

In examining open seat races in the general election, the only statistically significant factors in the likelihood that a challenger wins is that the challenger is a quality challenger and that a challenger is facing a quality challenger, providing evidence in favor of **H2a**. In support of **H4a**, neither being a Tea Party challenger nor facing one has any statistically significant effect of the probability of challenger victory. Holding all other values at their median, the predicted probability of a non-Tea Party quality challenger winning the open seat in the general election against a non-Tea Party, non-

quality challenger is about 80% whereas non-quality challengers have about a 51% probability of winning the same seat under the same conditions.

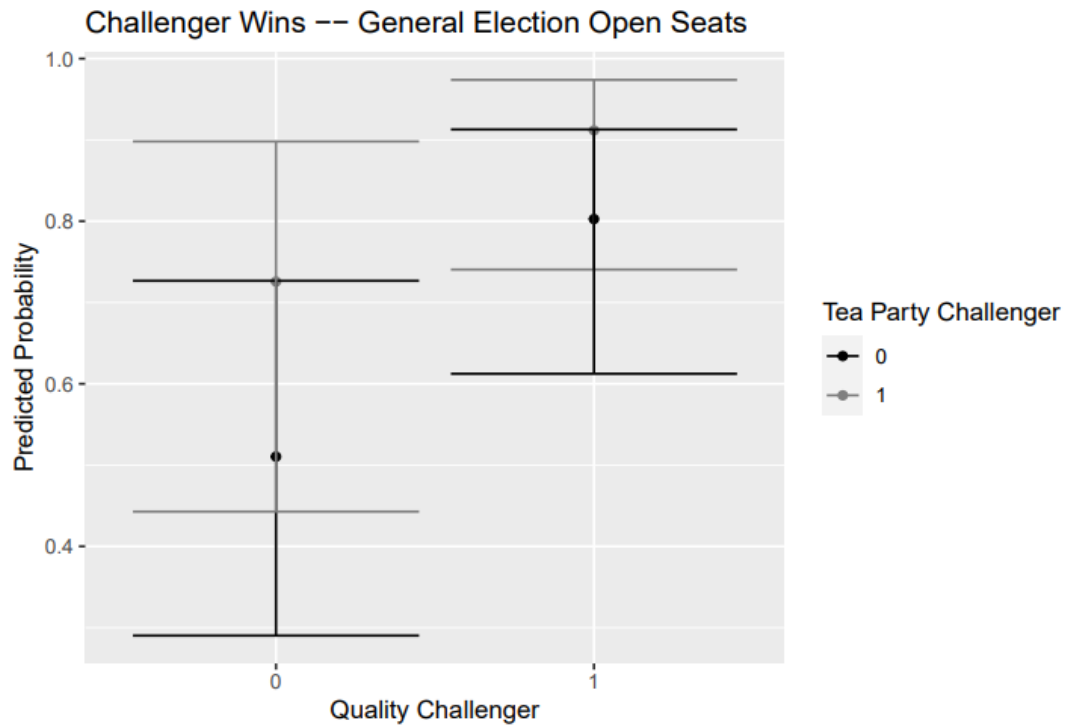


Figure 1: Predicted Probabilities of Challenger Winning in Open Seat General Election

Looking to incumbents' re-nomination in the primary stage, utilizing a Heckman selection model was inappropriate as the outcome variable was nearly collinear. All but one non-retiring incumbent won their re-nomination; this conflicts with the expectations of **H1b** but provides initial support for **H3b**. (It should be noted that only 3 quality challengers selected into Republican primaries where incumbents were present.)

Moreover, logit analysis was perfectly predicted by previous vote share. To allow more variation in the dependent variable, I run a standard OLS regression of incumbent vote share against the previous election vote share, the Obama district vote share, primary

type, and whether the incumbent faced a quality and/or Tea Party challenger. Previous performance, Obama vote share, and primary type all fail to achieve statistically significant results. For incumbents facing Tea Party challengers, their vote share is decreased by 8.1%, whereas incumbents facing quality challengers see their vote share decrease by 47.5%. Considering these effects on vote share, we see mixed support for both **H1b** and **H3b**.

Table 4: Effects on Incumbent Vote Share in Republican Primary Races

| Republican Primary – Re Election Races | |
|--|----------------------------|
| | <i>Dependent variable:</i> |
| | Vote Share |
| Vote Share ('08) | 0.002 (0.009) |
| Vote Share Obama ('08) | −0.041 (0.145) |
| Semi-Closed Primary | −6.223 (3.167) |
| Closed Primary | −1.433 (2.645) |
| Top Two Primary | −7.713 (4.877) |
| Quality Opponent | −47.551*** (8.018) |
| Tea Party Opponent | −8.107*** (2.438) |
| Constant | 95.195*** (6.535) |
| Observations | 154 |
| R ² | 0.289 |
| Adjusted R ² | 0.254 |
| Residual Std. Error | 13.608 (df = 146) |
| F Statistic | 8.461*** (df = 7; 146) |
| <i>Note:</i> | **p<0.05; ***p<0.01 |

Finally, in the Republican primary open seats, I use a logit to regress whether the challenger wins against being a quality challenger, being a Tea Party challenger, facing a quality and/or Tea Party challenger, Obama's previous performance in the district, and primary type. I find statistically significant effects for nearly all variables. Being a quality and or Tea Party challenger both increase the likelihood of election as does running in a closed primary. Here I find support for **H2b**, but a contrast with the expectations of **H4b**. The Obama vote share variable is significant but is again in the opposite direction of expectations. Generated predicted probabilities suggest that a non-Tea Party quality challenger facing a non-quality opponent in a closed primary in a district with moderate Obama support experiences 52% probability of victory. A non-quality challenger under the same conditions can only expect a 38% probability of electoral success.

Table 5: Probability Challenger Wins in Republican Open Seat Races

| Republican Primary – Open Seat Races | |
|--------------------------------------|----------------------------|
| | <i>Dependent variable:</i> |
| | Challenger Wins |
| Quality Challenger | 1.009*** (0.274) |
| Tea Party Challenger | 0.867*** (0.208) |
| Vote Share Obama ('08) | 0.056*** (0.009) |
| Semi-Closed Primary | −0.100 (0.266) |
| Closed Primary | 0.523** (0.226) |
| Top Two Primary | 0.001 (0.641) |
| Quality Opponent | 0.958*** (0.362) |
| Tea Party Opponent | 19.229 (712.409) |
| Constant | −4.650*** (0.636) |
| Observations | 580 |
| Log Likelihood | −302.855 |
| Akaike Inf. Crit. | 623.709 |
| <i>Note:</i> | **p<0.05; ***p<0.01 |

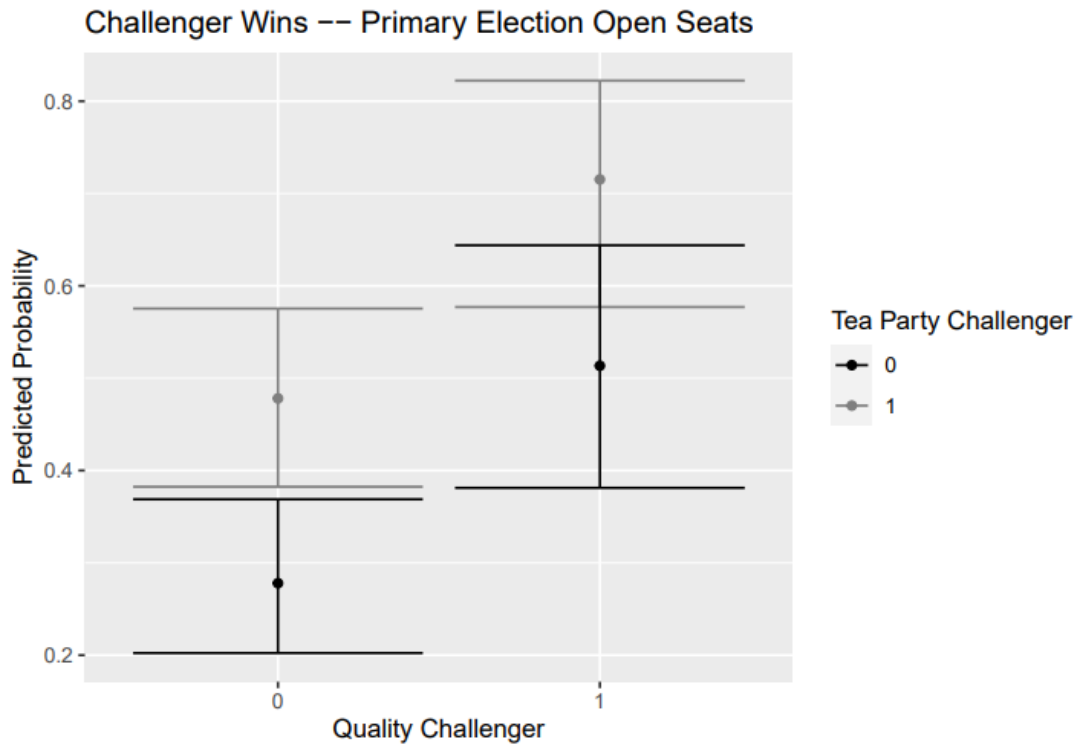


Figure 2: Predicted Probabilities of Challenger Success in Open Seat Republican Primary

1.5 Discussion

Though the efforts of the Tea Party movement, both at the grassroots and at the larger, corporate level, were noisy and effective in garnering media attention, evidence suggests that most Tea Party candidates were not able to turn the midterm elections in their favor any more than the mainstream Republican challengers. In view of the literature and findings above, most Tea Party victors won as a result of their political acumen, specifically their prior political experience, rather than the supposed momentum of the Tea Party label. However, in Republican open seat primaries, being affiliated with the Tea Party movement does offer a statistically significant advantage. These results find

additional support in the articles written by Jacobson (2011), Karpowitz et al (2011), and Bond et al (2012). This paper contributes further evidence to support the incumbency advantage and quality candidate theories.

“No matter how resource poor they are, however, challengers can raise issues.” Such behavior resonates well with the type of “amateur” party activism practiced by the grassroots Tea Party constituency. Amateur activists, being issue-oriented, rather than loyal to the party could appreciate the anti-Washington, uncompromising rhetoric preached by Tea Party candidates. (Hershey 2013). As such, this analysis adds to the literature on political movements, showing that even at the height of Tea Party fervor, campaigning as a Tea Party candidate offered little to no significant advantage. Further research should be directed toward examining the impact of the Tea Party and other electorally engaged social movements on candidate emergence, voter mobilization, and the long-term behavioral consequences of incumbents’ facing ideologically extreme challengers.

1.6 Conclusion

The 2010 midterm elections resulted in a massive shift of power and control in the House of Representatives. The grassroots “Tea Party” movement mobilized in a way that brought opportunities for new candidates of both quality and non-quality backgrounds to emerge including new sources of funding, marketing, and manpower. The Tea Party constituency’s support of an extremely conservative social agenda and reductionist economic policies resulted in the unseating of many incumbent Democrats, but almost

none of the so-called Republicans in Name Only that the Tea Party movement railed against.

Candidates claiming the Tea Party label found little advantage in swaying outcomes, though some evidence in favor of a Tea Party advantage is found in open seat primary races. However, as expected, facing a quality challenger significantly diminishes the reelection probability of incumbents. We observe that, to the extent the Tea Party was successful, the candidate success was overwhelmingly a function of prior political experience. Tea Party challengers who won, by and large chose races where they could target Democratic challengers who already faced an uphill battle with the negative sentiment directed at their party. Quality candidates had better organizational staff and overall were more skillful in running a campaign than their non-quality comrades. In compiling and analyzing an original dataset, I have found strong support for the effectiveness of quality candidates and minimal evidence of any Tea Party advantage.

2. Emergence and Success of Women in the 2018 US Congressional Elections

2.1 Introduction

This work is a collaborative effort between myself, and Dr. Andy Ballard and Michael Heseltine, Ph.D. candidate, from American University.

In the coverage of the 2018 congressional elections, conventional wisdom and media narratives suggested not only that this was likely to be a “wave” election with large gains for Democrats in the House of Representatives,¹ but also that this wave would be built on the electoral success of women. As such, 2018 was dubbed by many as the ‘year of the woman’,² a reference to the surge of female representatives in Congress in 1992. Twenty-six years later, records were broken for both the number of female candidates³ and the number of women elected to the House and Senate.⁴ Talk of the year of the woman appears to have held true, at least at first glance. We will also examine whether ‘the year of woman’ is a phenomenon unique to 2018, making comparisons with the supply of and demand for women in the 2016 election.

¹ <https://www.pbs.org/newshour/politics/why-2018-is-looking-like-a-wave-election-for-house-democrats>

<https://www.cnn.com/2018/11/26/politics/2018-midterms-democratic-wave/index.html>

<https://www.theguardian.com/us-news/2018/nov/16/the-democratic-blue-wave-was-real>

² For example, see: <https://www.brookings.edu/blog/fixgov/2018/11/07/2018-another-year-of-the-woman/>

<https://www.vox.com/2018/11/2/17983746/year-of-the-woman-1992>

<https://www.cnn.com/2018/11/03/opinions/midterm-elections-year-of-woman-roundup/index.html>

³ <https://cawp.rutgers.edu/potential-candidate-summary-2018#house>

⁴ <https://www.pewresearch.org/fact-tank/2018/12/18/record-number-women-in-congress/>

We examine this dynamic using an original dataset containing information on the characteristics of every candidate who filed with the Federal Election Commission to run for the House of Representatives and raised at least \$5,000 or received votes in a House primary election in 2018. Historically, debates over the (relative lack of) success of women in congressional elections has centered around supply-side (e.g., who chooses to run) or demand-side (e.g., the relative willingness of voters to vote for certain types of candidates) factors (e.g., Fox and Lawless 2005, 2014; Marschall, Ruhil, and Shah 2010; Ocampo 2017). Our analysis of the emergence and success of women in 2018 follows in this vein, as we first analyze who ran, at what rates, and in which contexts, then turn to investigating the relative success of female candidates. Even in a year with very good outcomes for female candidates, our evidence suggests that emergence and success are largely based on demand-side rather than supply-side factors, though there are some exceptions. Despite this surge in performance, women still have room for growth in achieving representation on par with general population proportions.

2.2 The 2018 Elections in Context

The political environment in the runup to the 2018 elections was ripe for the breakthrough of women candidates. The 2016 presidential election saw the first female major party presidential candidate win the national popular vote by roughly 3 million votes, only to lose the Electoral College to a candidate with a highly controversial record on women. In response, as many as 5.2 million people attended Women's Marches across

the country in 2017.⁵ As such, the outcomes of the 2016 election helped place women at the center of the national political discussion, and the 2018 midterms were the first national opportunity to test whether this new political salience could translate into electoral success.

Political engagement among voters was also high after the 2016 election, and the elections in 2018 had the highest midterms turnout in the last forty years (53%). Further, there were double-digit gains in turnout among multiple minority groups, young people, and women.⁶ As such, turnout is likely a critical factor to any ‘year of the woman’ outcomes.

The 2018 elections also saw many open seat elections with no incumbent following an unusually high number of retirements from Congress, particularly among Republicans.⁷ This large number of open seats may have prompted more political amateurs to throw their hat into ring, or, on the other hand, these open seats may have enticed better qualified (in terms of previous experience) candidates into the fray, particularly at the primary stage (Jacobson & Carson 2016; Banks & Kiewiet 1989; Schantz 1980).

Moreover, we know that midterm elections often favor the out-party, especially when the president is unpopular (Jacobson & Carson 2016; Tufte 1975; Campbell 1966).

⁵ <https://www.washingtonpost.com/news/monkey-cage/wp/2017/02/07/this-is-what-we-learned-by-counting-the-womens-marches/>

⁶ <https://www.census.gov/library/stories/2019/04/behind-2018-united-states-midterm-election-turnout.html>

⁷ https://ballotpedia.org/List_of_U.S._Congress_incumbents_who_did_not_run_for_re-election_in_2018

In 2018, this made an increase in Democratic seats in the House more likely. Women are already more likely to affiliate with the Democratic than the Republican party, and the advantage for Democrats in the political environment of 2018 led to not only an increase in the number of female candidates that ran and were elected, but also an increase in the asymmetry between parties in terms of the rates at which these candidates ran and won.⁸ While Democrats elected 89 women to the House and 17 to the Senate of the 116th Congress, only 13 Republican women sit in the House of Representatives and just 8 in the Senate—the fewest Republican women since the 103rd Congress when there were 12 in the House and 2 in the Senate.⁹ In what was one of the most nationalized elections on record,¹⁰ party asymmetry surely loomed large for the emergence and success of women in congressional elections.

2.3 Women in Congressional Elections

2.3.1 Supply-Side Factors

Research has suggested that women are, in part, underrepresented in Congress because they are less likely to run for office for a variety of reasons. For example, women are less willing to express political ambition than men (Fox and Lawless 2014), less

⁸ This asymmetry may be a result of a combination of differing party structures and paths to elected office (Sanbonmatsu 2002; King and Matland 2003; Thomsen 2015), more accommodating financial infrastructure within the Democratic party (Crowder-Mayer and Cooperman 2018; Kitchens and Swers 2016)), or a greater willingness among Democratic voters to support women candidates (King and Matland 2003).

⁹ <https://cawp.rutgers.edu/history-women-us-congress>

¹⁰ 204 of the 207 (98.5%) districts won by Hillary Clinton in 2016 being won by Democrats in 2018. <https://www.dailykos.com/stories/2012/11/19/1163009/-Daily-Kos-Elections-presidential-results-by-congressional-district-for-the-2012-2008-elections>

willing to run for office (Kanthak and Woon 2014), and less likely to run for higher office without previous electoral experience (Pearson and McGhee 2013).

In addition to expressing willingness to run at lower rates, women face larger structural hurdles to seeking office. Party recruitment networks negatively impact the rates at which female candidates are recruited (Crowder-Meyer 2013; Milyo 2000; Ocampo 2017; Ocampo and Ray 2019), and potential female candidates exhibit lower response rates to formal party recruitment efforts (Preece et al. 2015).

2.3.2 Demand-Side Factors

While evidence suggests that biases negatively affect the supply of female candidates, the evidence of demand-side discrimination against these candidates while running for office is more mixed. In terms of how voters assess candidates, gender stereotyping is often employed in electoral settings to the potential disadvantage of female candidates (Bauer 2014; Monica and Bos 2013), but the negative role of gender in voter assessments may be smaller than conventional wisdom would otherwise suggest (Brooks 2013; Ono and Burden 2018) and may even be advantageous to women (Anzia and Bernhard; Brooks 2013; Fridkin and Kenney 2009) in certain conditions.

However, voter assessments of candidates do not perfectly map onto electoral outcomes. Still, evidence suggests that women and men win at roughly equal rates (Burrell 1994; Fox 2006). Further, other scholarship suggests that the notion of candidate quality (Jacobson 1989) and perceptions of gender bias (Lawless & Fox 2005) mediate the relationship between candidate gender and electoral success. As such, while election outcomes suggest equal demand across genders, there may be a supply-side explanation

for outcome parity (Fulton 2012; Milyo 2000). Indeed, Anzia and Berry (2011) argue that potential female candidates may be self-selecting *out* of the candidate pool, resulting in only the most qualified female candidates running for office.

2.3.3 Expectations for Women Candidates in 2018

These trends lead to expectations for how women fared in 2018. On the supply side, even in a record-setting year for women candidates, we would expect the pool of these candidates to be smaller than that of men in 2018, respectively, particularly relative to their population proportions (**H1**). On the demand side, we would expect something close to electoral parity between men and women (**H2**). Finally, in the highly nationalized electoral environment of 2018, we would expect the effects of gender on candidate performance to be overshadowed by voters' increased reliance on partisan identification (**H3**).

2.4 Data

In order to test our expectations, we gathered a comprehensive dataset of all candidates for the House of Representatives in 2018, individually coded across a range of personal, professional, and demographic characteristics. While some previous studies of candidate emergence rely on geographically constrained subsets of candidates, or focus only on general election candidates, the data used here will incorporate every Congressional candidate who filed with the Federal Election Commission and raised at least \$5,000, or who ran in an election.

A team of undergraduate research assistants collected the data, supervised by the authors. Beginning in October 2018, using a variable list generated by the authors, research assistants gathered data first from candidate websites, if available, then proceeded to sites including Ballotpedia, Project Vote Smart, Open Secrets, and Pew Research as necessary. Research assistants collected largely candidate-level data, focusing on personal attributes of interest including but not limited to: date of birth, race, gender, education level, sexual orientation, religious identification, military experience, and previous experience in elected office. Full information on the coding scheme can be found in the appendix.

We also collected election returns data for primaries and general elections using state-level certified results which included vote count and vote share. Additional data was collected on whether each race was incumbent-held or an open seat, the type of primary (e.g., open or closed), the share of the district-level two-party presidential vote for Donald Trump in 2016, the incumbent's share of the two-party vote in 2016 and their party, and demographic information for each district.

2.5 Methods

In order to investigate the emergence and success of women in the 2018 congressional elections, we employ a combination of descriptive and multivariate regression analyses. On the supply side, the unit of analysis is an election (primary or general) and our dependent variable is whether each primary or general election had at least one woman running. On the demand side, the unit of analysis is each race for our descriptive analyses and each candidate in either a primary or general election for our

multivariate analyses, and our dependent variables are 1) whether the candidate won or lost, and 2) their share of the vote.

In our multivariate analyses we use several control variables to account for factors that may affect the probability that women run and/or their success in primary and/or general elections. In our supply-side models predicting the emergence of women as candidates in primary elections, we include 1) a dummy variable for whether the race is a Democrat-eligible primary,¹¹ 2) the non-white population proportion in the district, 3) dummy variables for the census region of the state, 4) the median age in the district, 5) the foreign-born population proportion in the district, 6) the unemployment rate in the district, 7) the median income in the district, 8) the proportion of the district population with a high school degree, 9) how electorally safe the district is, measured as the absolute value of the district's PVI score, 10) a dummy variable for whether there is an incumbent running in the district, 11) a dummy variable for whether the primary is open, and 12) a dummy variable for whether the district is primarily suburban.

In our demand-side models predicting the success (win-loss and vote share) of candidates in primary and general elections, we include: 1) a dummy variable for whether the candidate is a Democrat, 2) a dummy variable for whether the candidate has previously held elected office, 3) a dummy variable for whether the candidate is female, 4) a dummy variable for whether the candidate has a college degree, 5) a dummy variable

¹¹ Defined as either a Democratic Party primary or a non-partisan party primary in which Democrats were eligible to run. Substantive results did not differ when using Republican-Eligible as the delineator or when removing nonpartisan primaries.

for whether the candidate has a postgraduate degree, 6) the total amount the candidate received in campaign donations, in dollars, 7) the median income in the district, 8) the non-white proportion of the district population, 9) the proportion of the district population with a high school degree, 10) electoral safety, measured as the absolute value of the district's PVI score, 11) whether there was an incumbent running in the district, and 12) whether the district was primarily suburban. We also include a three-way interaction in the models to further tease out the demand for female candidates: Female*Democrat*Experience.

2.6 Results

2.6.1 The Supply of Candidates

We begin our analysis by looking at the rate at which at least one woman appeared in primary and general elections, which is displayed in Figure 3.

Unsurprisingly, women were more likely to appear in Democratic-eligible than Republican-eligible primaries and as Democrats than Republicans in general elections, all of which are statistically significant differences.

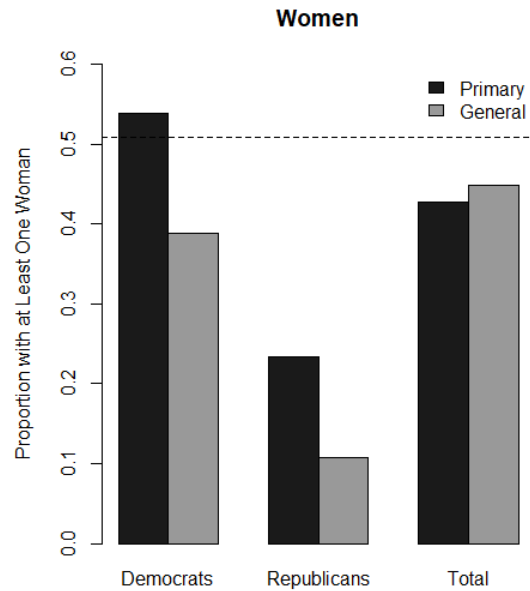


Figure 3: The proportion of primary and general elections in which at least one woman ran , broken down by Democratic- and Republican-eligible races (for primaries) or whether a female candidate appeared representing either party (for generals), as well as all races for each election type. Horizontal dashed lines represent the estimated population proportion of female persons in the US in 2018.¹²

The only subgroup where the proportion of races with at least one woman exceeded the population proportion of women was in Democratic-eligible primaries. This difference between the US population proportion of women and the proportion of all primary and general elections with at least one woman running was 6.0 percentage points.

¹² <https://www.census.gov/quickfacts/fact/table/US/IPE120217>

Finally, a higher proportion of general elections had at least one woman candidate than primary elections (0.448 versus 0.428). While these differences are not statistically significant, they suggest that women made it through to general elections at similar rates to what we would expect given the supply of candidates in primaries.

The descriptive statistics in Figure 3 suggest something close to parity for gender. This is a surprising result, given the strong evidence of how supply-side factors contribute to the underrepresentation of women in Congress. To examine further, we use multiple regression to explore the factors that led women to run. In Table 6 we present results of logistic regression models predicting the presence of at least one woman in a primary election as a function of contextual factors about the race. For each dependent variable, we ran three models: one where the sample is all primaries, one where the sample is Republican-eligible primaries, and one where the sample is Democrat-eligible primaries.

The factors predicting the emergence of women candidates are, in general, not different from those already detailed in the literature. Women were more likely to run in Democratic-eligible primaries. The most consistent predictor of the emergence of female candidates was when the district did not have an incumbent.

Table 6: Logistic regression results predicting the appearance of at least one woman in a primary election. We estimate models using all races alongside models using only primaries in which candidates of each party ran. Standard errors appear below coefficients in parentheses.

| | At Least One Woman | | |
|--------------------------------|---------------------------|----------------------------|--------------------------|
| | All Primaries | Republican Eligible | Democrat Eligible |
| Constant | -0.54 (0.60) | 1.02 (0.88) | -1.99* (0.84) |
| Democrat-Eligible | 0.32*** (0.04) | | |
| Proportion Non-White | -0.18 (0.18) | 0.09 (0.27) | -0.39 (0.25) |
| Northeast | -0.07 (0.07) | -0.08 (0.10) | -0.07 (0.09) |
| South | 0.01 (0.05) | -0.01 (0.07) | 0.04 (0.07) |
| West | 0.07 (0.07) | 0.07 (0.10) | 0.07 (0.10) |
| Median Age | -0.01 (0.01) | -0.01 (0.01) | -0.01 (0.01) |
| Proportion Foreign-Born | 0.50 (0.28) | 0.03 (0.42) | 0.91* (0.39) |
| Unemployment | 2.24 (1.85) | -1.63 (2.91) | 4.77 (2.46) |
| Median Income | 0.00 (0.00) | -0.00 (0.00) | -0.00 (0.00) |
| Proportion HS Grads | 0.01 (0.01) | -0.00 (0.01) | 0.02** (0.01) |
| Electoral Safety | -0.00 (0.00) | -0.01 (0.00) | -0.00 (0.00) |
| No Incumbent | 0.31*** (0.04) | 0.29*** (0.06) | 0.33*** (0.06) |
| Open Primary | -0.01 (0.05) | -0.03 (0.07) | -0.00 (0.06) |
| Suburban | 0.01 (0.04) | 0.00 (0.06) | 0.02 (0.06) |
| Observations | 654 | 298 | 356 |
| Pseudo R² | 0.170 | 0.065 | 0.089 |

* $p < 0.05$ ** $p < 0.01$ *** $p < 0.001$

While none of these factors is novel in predicting the emergence of female candidates for Congress, these candidates ran at unprecedented rates in 2018,

approaching descriptive parity in all elections. It seems that in 2018, supply-side explanations for underrepresentation of women in Congress apply less than we would expect from the literature.

2.6.2 The Demand for Candidates

Though the potential supply-side explanations for the underrepresentation of women in Congress do not hold up as much as we would expect in 2018, women remain underrepresented in the 116th Congress. Demand-side explanations, then, should account for the discrepancies. We begin to unpack the potential demand-side explanations in Figure 4, which shows the proportion of primary and general elections won by women, broken down by all races and those with at least one female candidate, and according to whether a Democrat or Republican won. As in Figure 3, we include the population proportion as a benchmark for descriptive representation, though this is only relevant for comparison with the bars detailing “All Races”.

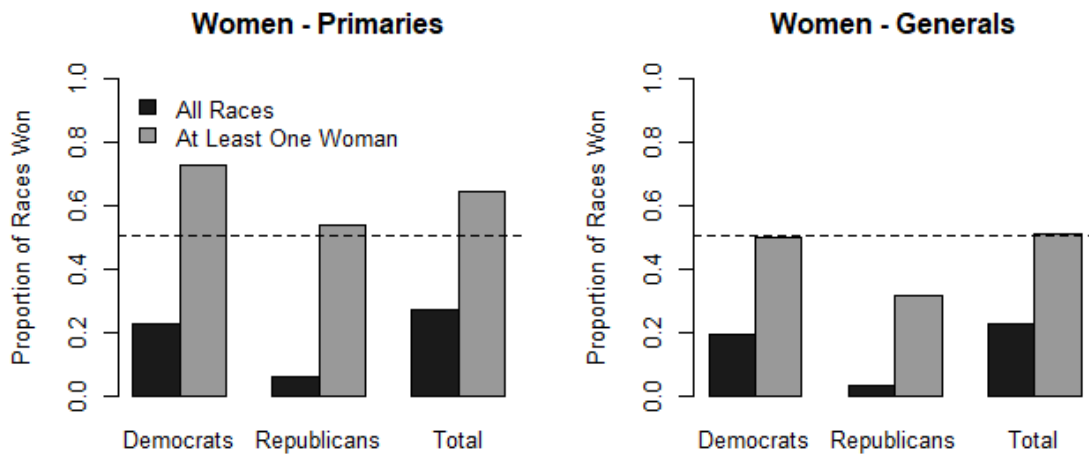


Figure 4: The proportion of primary and general elections won by women, broken down by candidate party as well as the total proportion. Proportions are computed for all races (black bars) and for races in which at least one woman ran (gray bars). Horizontal dashed lines represent the estimated population proportion of female persons in the US in 2018.

Although women neared parity in terms of appearing in both primary and general elections, they fell much farther short of descriptive parity for outcomes in both primary and general elections. Among all primary and general elections, as well as those in which at least one woman ran, Democratic women won a statistically significant higher proportion of races than Republican women. Interestingly, the proportion of races in which at least one woman ran that were won by a woman was equal or higher in primary elections than in general elections. This suggests that women were relatively more successful at winning their party's nomination than they were at being elected to Congress.

To further pull apart the relative success of women candidates, we estimated regression models predicting candidate vote share (via OLS) and whether candidates won

their elections (via logistic regression) in both primary and general elections. The results of these models can be found in Table 7.¹³ While the most important predictor for our analysis is the three-way interaction term, some interesting trends emerge in the control variables. First, candidates with previous experience in elected office fared better in primary and general elections in terms of both vote share and win probability. Second, we find the same trends for candidates holding a college degree. While there are other significant relationships (e.g. for electoral safety, running for an open seat, and running in a Democratic primary), these can be explained by either the number of candidates running in each race or the nature of elections in safer districts.

¹³ We do not include the Total Receipts variable in our primary election models because it measures the total each candidate received throughout the entire election cycle, including after the primary election.

Table 7: Regression results predicting the vote share (via OLS) and whether candidates won in primary (columns 1 and 2) and general (columns 3 and 4) elections. Controls are either at the level of the candidate or the district. Standard errors appear below relevant coefficients in parentheses.

| | Primary | | General | |
|--|---------------------|---------------------|--------------------|--------------------|
| | Vote Share | Won Election | Vote Share | Won Election |
| Constant | 0.38 * (0.17) | 0.75 ** (0.27) | 0.19 (0.10) | -0.28 (0.31) |
| Female | -0.03 (0.04) | 0.03 (0.06) | -0.03 (0.03) | -0.17 (0.09) |
| Democrat | -0.06 * (0.02) | -0.10 ** (0.04) | 0.02 (0.02) | -0.07 (0.06) |
| Experience | 0.23 *** (0.03) | 0.33 *** (0.04) | 0.19 *** (0.02) | 0.56 *** (0.05) |
| College | 0.08 *** (0.02) | 0.15 *** (0.04) | 0.07 *** (0.02) | 0.15 * (0.06) |
| Median Income | -0.00 (0.00) | 0.00 (0.00) | -0.00 (0.00) | -0.00 (0.00) |
| Proportion White | 0.17 ** (0.06) | 0.13 (0.09) | -0.06 (0.04) | -0.08 (0.11) |
| Proportion Foreign-Born | -0.25 * (0.11) | -0.23 (0.17) | 0.14 * (0.07) | 0.10 (0.22) |
| Proportion IHS Grads | -0.00 (0.00) | -0.01 * (0.00) | 0.00 (0.00) | 0.00 (0.00) |
| Electoral Safety | 0.00 *** (0.00) | 0.01 ** (0.00) | 0.00 *** (0.00) | 0.01 *** (0.00) |
| No Incumbent | -0.19 *** (0.02) | -0.27 *** (0.03) | 0.03 * (0.01) | 0.07 (0.04) |
| Suburban | 0.04 * (0.02) | 0.05 (0.03) | -0.01 (0.01) | 0.02 (0.03) |
| Democrat*Experience | 0.11 * (0.05) | 0.15 * (0.07) | 0.05 (0.03) | 0.25 * (0.10) |
| Female*Democrat | -0.09 (0.06) | -0.13 (0.10) | 0.00 (0.04) | -0.00 (0.12) |
| Experience*Female | 0.06 (0.04) | 0.10 (0.06) | 0.01 (0.02) | 0.11 (0.07) |
| Democrat*Experience*Female | -0.03 (0.07) | -0.09 (0.12) | 0.01 (0.05) | -0.10 (0.14) |
| Total Receipts | | | 0.00 *** (0.00) | 0.00 *** (0.00) |
| Observations | 1386 | 1504 | 746 | 762 |
| R ² / R ² adjusted | 0.296 / 0.288 | 0.236 / 0.228 | 0.493 / 0.482 | 0.461 / 0.449 |

* $p < 0.05$ ** $p < 0.01$ *** $p < 0.001$

In Figure 5 we plot the marginal effects of the three-way interaction for each of the four models in Table 7. This gives us a better sense of whether women candidates fared differently in their elections relative to male candidates, and whether any differences were mediated by whether candidates had previous experience in elected office and/or were running as Democrats or Republicans.

The marginal effects of the three-way interaction between previous experience in elected office, party, and candidate gender are shown in Figure 5. The only statistically significant difference shown between men and women in Figure 5 is for Democrats with no previous experience in elected office in primary elections, who again were 65.9% of the field of Democratic candidates. Among such candidates, women received an average of 8.5 percentage points more in vote share than men and were 18.5 percentage points more likely to win their primary elections than men, on average.

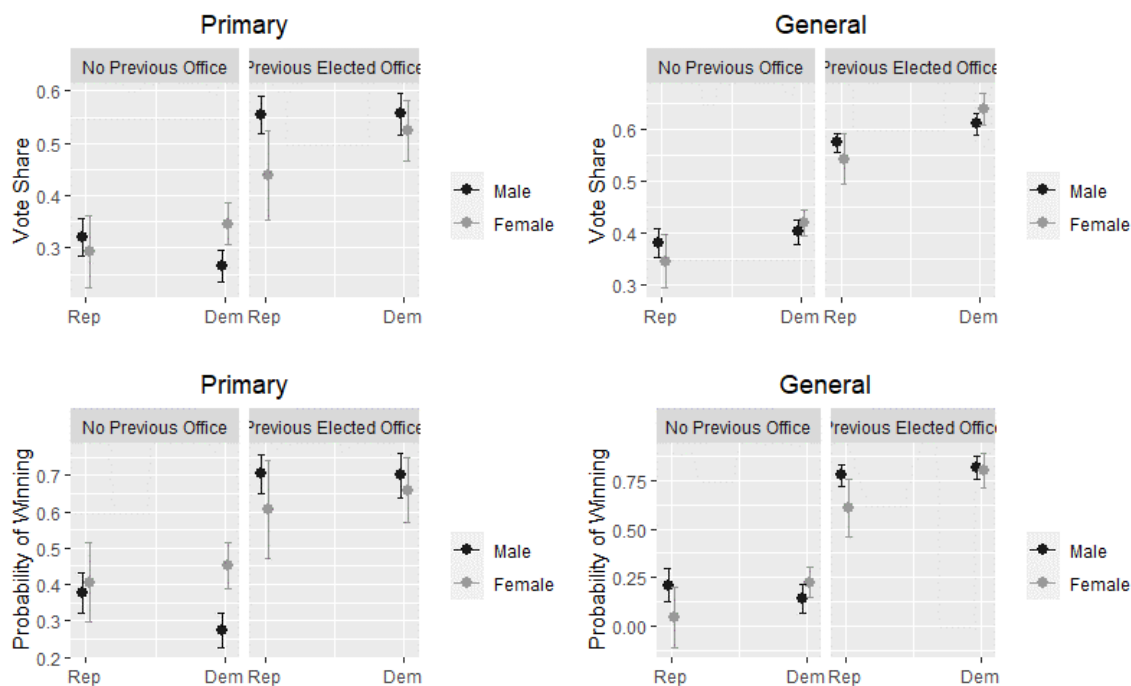


Figure 5: Predicted effects for candidate vote share (top panels) and probability of winning (bottom panels) in primary (left panels) and general (right panels) elections, based on the three-way interaction for the models in Table 2 between candidate gender (male or female), party (Republican or Democrat), and experience (previously held elected office or not).

While there are no other statistically significant differences, the remaining differences that are shown in Figure 5 tend to advantage men relative to women, particularly among Republican candidates. In terms of vote share in both primary and general elections, inexperienced Republican men see a modest advantage of 3%-4% over similarly experienced women. Among experienced Republicans, we observe a significantly greater advantage in the primary for men over women, on the order of 12%. Interestingly, the male advantage diminishes in the general, back down to around 4%. In terms of win probability, men see significant advantages over women in almost all conditions, save inexperienced candidates in the primary.

Perhaps surprisingly given the rates at which men were advantaged as candidates in terms of electoral outcomes, the nonsignificant trends for Democrats tended to slightly advantage women relative to men. Democratic women see modest advantages (2%-3%) over similarly experienced Democratic men in the general election. A female vote share advantage is less clear in the primary elections, with inexperienced women outperforming similarly situated men by about 8% while seeing a deficit of about 3% among experienced candidates. It bears repeating that these are not statistically significant trends. Inexperienced female candidates see a higher win probability than their male peers in both primary and general elections (17% and 11%, respectively). This trend reverses among experienced candidates, though the differences are small (4% and 2%, respectively).

2.6.3 2016: A Preliminary Point of Comparison

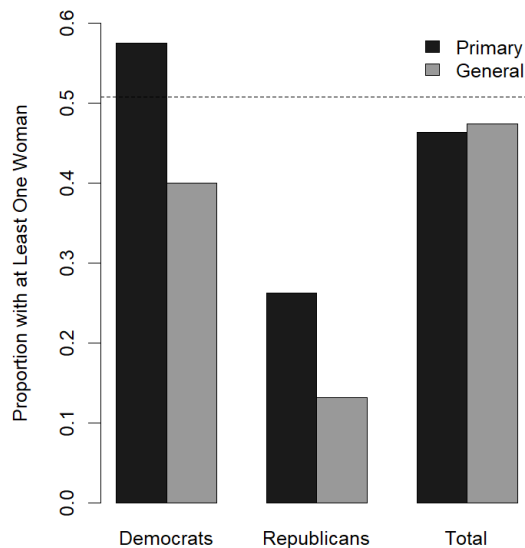


Figure 6: The 2016 proportion of primary and general elections in which at least one woman ran, broken down by Democratic- and Republican-eligible races (for primaries) or whether a female candidate appeared representing either party (for generals), as well as all races for each type. Horizontal dashed lines represent the estimated population proportion of female persons in the US in 2018.¹⁴

Comparing Figure 6 to Figure 3, we observe a very similar story in 2016 as in 2018. Overall, the proportion of races with at least one woman approaches, but does not reach population parity in the primary or general elections when examining all races together. Binned out by party, 2016 and 2018 trends are again remarkably similar. Only in Democratic primary races do we see the proportion of women reach (and exceed)

¹⁴ <https://www.census.gov/quickfacts/fact/table/US/IPE120217>

population proportion of women in the US. There is also a significant party asymmetry; nearly 30% fewer races feature women running as Republicans, compared to the proportion running as Democrats. It would seem then that supply-side factors are not the limiting factor to achieving gender parity in Congress.

Turning to Figure 7, and comparing it to Figure 4, we again observe remarkably similar trends. In 2016 primary races, among those with at least one woman running, we see approximately 70% are won by a woman, an almost identical proportion to 2018. When we step back and examine all races, we see women are winning about 25% of all primary contests in both 2016 and 2018. Rates of success among individual parties are also similar year to year. Looking at the general election, we again observe similar trends. Women did win a slightly higher proportion of general election races in 2018 relative to 2016 in both races with at least one woman and among all races, but the difference is only a few percentage points. As we would expect, trends by party are comparable year to year, with significantly fewer Republican women winning office compared to the success rate of Democratic women candidates. Indeed, it would seem that in recent years we are observing a demand-side cap on the number of women entering Congress.

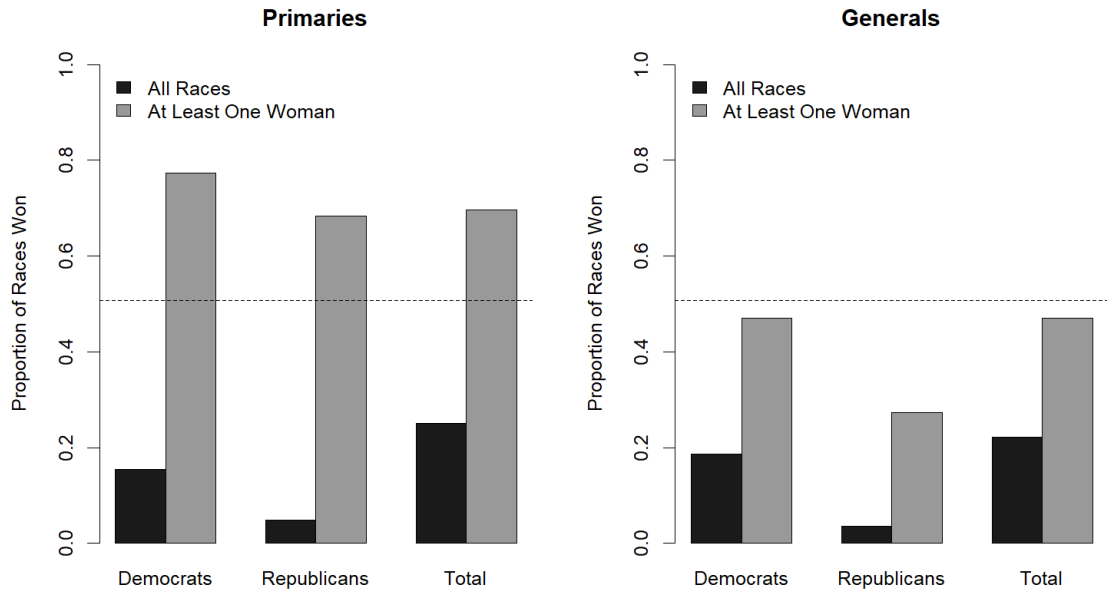


Figure 7: The 2016 proportion of primary and general elections won by women , broken down by candidate party as well as the total proportion. Proportions are computed for all races (black bars) and for races in which at least one woman ran (gray bars). Horizontal dashed lines represent the estimated population proportion of female persons in the US in 2018.

2.7 Discussion

Existing scholarship on the underrepresentation of women in Congress has investigated both supply- and demand-side explanations, finding more consistent support for the idea that these women are underrepresented because they are less likely to run for office than for the idea that voters prefer to vote for male candidates instead. However, we find that supply-side factors in the 2018 congressional elections matter less than demand-side factors for explaining the disparity in descriptive representation in the current Congress.

Female candidates ran at rates that almost reached their proportion of the population. However, these groups are still underrepresented in Congress. When the 116th Congress was sworn in during the January following the 2018 elections, women held 24% of the seats in Congress despite being 51% of the population. Further, women candidates won at lower rates than we would expect from the rates at which they ran, if voters were to equally prefer female versus male candidates. Our multivariate analyses show substantial advantages to male candidates relative to female candidates, especially within the Republican Party.

Our results suggest that, on the one hand, while women face substantial barriers to running for Congress, these were overcome in record numbers in 2018, as we observed women running at unprecedented levels. From our data it is not possible to tell whether the various barriers that make it less likely that women will run for Congress have lessened, or whether efforts to get these candidates to run just overcame these barriers, or both. It may also be true that the 2018 electoral context was uniquely favorable for female candidates relative to the recent past and even the near future. As such, this is a trend on which scholars should continue to pay keen attention.

On the other hand, this influx of female candidates did not translate to electoral victories anywhere near the rates we might expect from how often they ran, and we found that male candidates were advantaged at the ballot box relative to female candidates. The most pressing question to come from this paper, then, is why female candidates did not do as well as we might expect in their elections, particularly relative to how often they ran. One possible explanation is that there was some sort of backlash effect against these

candidates at the ballot box that is unique to the political environment in 2018, in response to women running in record numbers. It may also be true that because women were much more likely to run as Democrats, that they were even less successful against male Republican candidates. The likelihood of running in open seats also presents a potential problem for the translation from running to winning, since such elections tend to be more competitive.

Whatever the specific reasons, reconciling the disparity between the rates at which women ran and the rates at which they won in 2018 is an important puzzle for political scientists that can help inform the future debate about demographic underrepresentation in Congress. If we find similar results in terms of the supply of and demand for women candidates in future elections, it may be time to revise our thinking about the barriers to parity in descriptive representation in Congress in terms of the relative effects of supply- versus demand-side explanations.

3. Meaningful Social Movement Identities and Political Participation

3.1 Introduction

“We’re not even close to done. It’s not a blue wave. It’s not a pink wave. It’s a #WomensWave and it’s flooding the streets of DC and cities across the country on January 19, 2019.” – Women’s March Twitter account. The Associated Press estimated attendance for the 2019 Women’s March in Washington D.C. at 100,000 people with another 500,000-600,000 estimated to have been marching elsewhere across the United States. What motivates individuals to leave the warmth and comfort of their homes on a cold Saturday morning in January?

Why do people participate in social movements? Although there are many potential answers to this question, I focus on an explanation couched in identity. In the current US political context, satisfaction with most branches of government is quite low and desire for change quite high. Social movements are collectivities, typically of substantial size, that engage in sustained conventional and non-conventional activity against elites and elite institutions to effect shared goals for change, usually in policy or society broadly (Opp 2009; Tarrow 1998; Klandermans 1997; Katz 1971). I argue that psychological attachments tied to deeply held values and a sense of belonging, i.e., identities, can form between citizens and social movements. Social movement participation affords disaffected individuals a means of expressing their identity, and with some small but non-zero probability, an opportunity to achieve social or political change.

Acting to express preferences and achieve implementation is costly. These costs can take many forms: information gathering, time, money, opportunity, and sometimes, safety (Riker and Ordeshook 1968; Downs 1957). When action is costly – it can be especially so with social movement activity – and success uncertain, given social movement actors are often thought of as political “outsiders”, why then do we observe a world in which large numbers of individuals participate in social movement activities?

By activating the identity of individuals aligned with a movement, social movements can lead individuals toward various forms of participation, whether that be voting, protesting, or working for a candidate. Movement identifiers have “opted-in” to the identity and can reasonably be expected to be responsive to identity activation. This responsiveness should vary according to the strength or intensity of an individual’s social movement identity. Thus, I rely on the Huddy et al. (2015) identity instrument that accounts for this variation in strength, rather than a binary characterization of identifier or non-identifier.

The Huddy et al. (2015) instrument captures the psychological aspects of identification, probing respondents’ sense of belonging to, support for, and self-identification with a movement. I find this measure to be highly useful for measuring social movement identities. Across the eight individual movements that I study through survey work, the instrument demonstrates high inter-item reliability and all scale onto a single latent dimension. I use additional items in my survey to assess the participatory effects of this identity.

In this paper, I build on social identity and social movement theory to construct a theory of social movement identity. Using two surveys, I estimate the prevalence of various social movement identities. I test the reliability of a modified version of Huddy et al.'s (2015) partisan identity instrument, which I use to measure the strength of social movement identity. Lastly, I analyze how activating these identities drives self-reported willingness to participate in various political activities. Knowing how effective these movements are at mobilizing its identifiers is important to our understanding of contemporary elections. In recognizing social movement identity as a potential mobilizer with the capacity to induce political participation, scholars should consider it as an explanation beyond the classic considerations of socio-economic status and social networks (Fisher 2012; Schussman and Soule 2005; Verba et al. 1995).

3.2 What is Identity?

Identity theory has its roots in the work of Tajfel and Turner (1979), particularly in their work on social identity theory (SIT). This theory explains the relationship of the individual to the group and the emergence of collective phenomena from individual cognition (Brown 2000). Importantly, Tajfel and Turner (1986) distinguish between personal and social identity; social identity, the element relevant to our discussion, is the “sum total of social identifications used to define oneself” (Turner 1982) or alternately, “the individual’s knowledge that she belongs to certain social groups together with some emotional and value significance to her of the group membership” (Tajfel 1972). Social identification does not necessarily imply formal membership in a social movement. The implication here that I wish to reinforce is that neither identifying with a

movement nor responding to a movement's call to action requires an individual to be on the rolls of a movement's membership list, to pay dues, or to attend monthly meetings. In fact, with some social movements, these forms of affiliation do not exist (Skocpol 2003). Neither does identification require one's physiological traits match that which is ostensibly characteristic of the movement or its leaders in order to identify with a social movement. It is the underlying beliefs, norms, and behaviors of a movement that lead one to identify with a social movement.

I rely on Tajfel and Turner's (1982) concept of "referent informational influence," which proposes that once an identity is held, that individual learns and internalizes the norms espoused by the archetypal member of a that group. Furthermore, if and when this identity is activated or made salient, a group member is more likely to act in accordance with those norms. Given that the stereotypical member of a social movement is perceived as a highly involved social or political activist, it follows that identifying with a social movement should lead an individual to also engage in similar participatory acts.

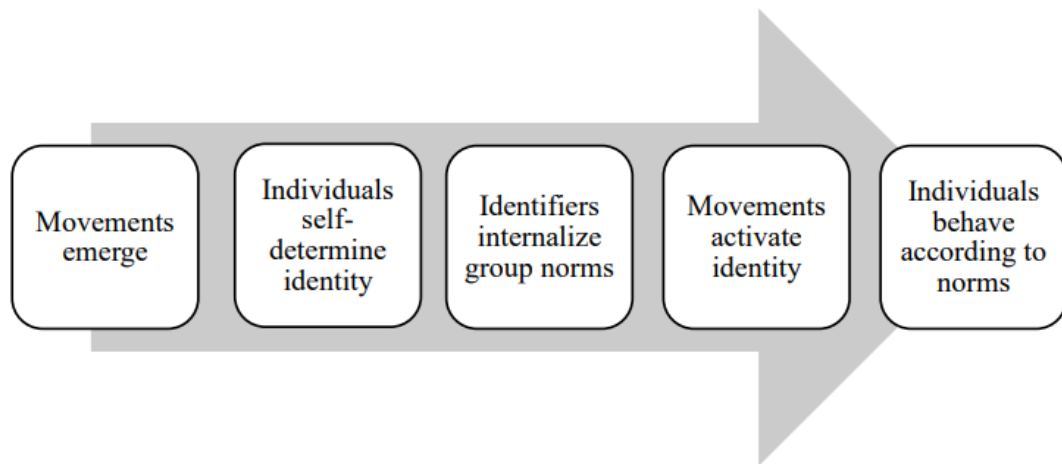


Figure 8: Tracing the Referent Informational Influence Process

3.3 Measuring Identity

In studying social movement identities, it is important to know whether or not the individual items in the scale are measuring the same concept across the movements of interest. I use Cronbach's alpha, the standard measure of reliability, to capture whether the modified Huddy et al. scale items would give the same measurement outcomes. It represents the degree to which outcomes depend upon general rather item-specific factors. Per Gardner (1995), "alpha is maximized when every item in a scale shares common variance with at least some other items in the scale." This is thought of as a measure of internal consistency, the idea that a latent construct underlies all of the items in a scale. Alpha scores should not be conflated with unidimensionality which should be determined by factor analysis.

3.4 Identity and Participatory Behavior

I draw upon the partisan identity literature to derive expectations about the effects of social movement identity on behavior. Campbell et al. (1960) can be considered among the founders of the partisanship-as-identity perspective as they define partisanship as “the set of beliefs and feelings that produce a psychological attachment to a political party”. Converse (1964, 1969) and many others, notably Green, Palmquist, and Schickler (2002) advance this literature, articulating how this identity is transmitted through social ties and how other identities mediate or accentuate partisan identity.

The effects of a deeply held identity are many; individuals with a strong party identification are more likely to vote than weak identifiers or political independents (Finkel and Opp 1991; Abramson 1983; Campbell et al. 1960). Verba and Nie (1972) find that partisanship, in addition to socio-economic status, is highly predictive of voting and participation in campaign activity.

In the partisanship literature there is also an instrumentalist camp, hallmarked by the work of Downs (1957), Fiorina (1981), and MacKuen et al. (1989). These scholars posit that party loyalty is a function of a party’s ability to meet voters’ expectations and achieve their policy preferences. Thus, instrumental partisan participation, in its many forms – voting, donating, volunteering, and attending events should be dictated by how responsive parties, or movements, are to their constituents.

The partisanship-as-identity perspective provides clear expectations about the relationship between participation and identity; the stronger one’s partisan identity, the more likely an individual should be to engage in participatory behavior.

3.5 Theory and Expectations

If partisan identity can influence and ultimately overcome the inertia inherent to voting and participation broadly, perhaps social movement identities are capable of the same. Social movements, often centered around political issues should elevate incentives of movement identifiers to participate in traditional ways as a means of expressing the beliefs associated with one's social movement identity, and when successful, as a means of substantive gain. Hypothesis 1 formalizes this. The respondents filtered out of the survey by the screening questions prior to the Huddy et al. instrument constitute non-identifiers; all other are considered identifiers and are subsequently subjected the identity instrument to determine the strength of the identity.

Social movements activate identity in the public sphere as a means of elevating the salience of the identity. Contemporary social movements have an enormous public and digital presence (Carty 2011; Castells 2001, 1997); through this medium, social movements send out messages invoking the identity of individuals aligned with a movement, promoting various forms of participation, whether that be voting, protesting, or working for a candidate. These messages should be more or less effective relative to the strength of each individual's social movement identity. This expectation forms the basis of Hypothesis 2a.

When identity activation is successful, individuals who strongly identify with social movement identities should be more likely to engage in various forms of political participation, relative to their non-activated peers. The process of activating and

participating are iterative until the movement declines. I test this expectation, Hypothesis 2b, through a survey experiment.

3.5.1 Hypotheses

H1: Social movement identity, as captured by the Huddy et al. instrument, will be demonstrably present among survey respondents.

H2a: The strength of a social movement identity will share a positive relationship with willingness to engage in acts of political participation.

H2b: Willingness to participate should be significantly higher among those activated to think about their identity, relative to non-activated identifiers.

3.6 Materials and Methods

I collected data to test these hypotheses through two surveys; the first is targeted toward the general population to ascertain the extent of the public's identification with various social movements currently or recently active in the US. For my second round of surveying, I embed an experiment among the original set of survey questions, probing individuals on their willingness to persist in various participatory activities after activating a relevant social movement identity. As a point of comparison, the results of the social movement activation can be contrasted with the results of both a partisan identity activation and a control with no identity activation.¹⁵

¹⁵ Each survey was conducted using approximately 750 participants, drawn from an online sample provided by Lucid's Fulcrum Academia BETA. Fulcrum Academia does not allow researchers to set parameters on the composition of survey samples, but the distribution of age, education, income, gender, and race are each approximately consistent with the proportions found in the general public. Panelists recruited by Lucid are incentivized using a

For analysis of social movement identities, I selected eight social movements that are or were recently active in the United States. I sought to achieve a balance of progressive and conservatively oriented movements, but this was difficult as there are many fewer conservative social movements with a national presence. The four progressively oriented movements were the previously mentioned Women’s March and #MeToo movements, Black Lives Matter, and the “RESIST” movement, a collectivity engaged in resistance against former president Donald Trump and his administration. The four conservative movements include All Lives Matter, the aforementioned Tea Party, the Secure the Border Movement, and the “Alt-Right Movement”.

3.6.1 Identity Instrument

In order to measure social movement and partisan identity, I modified Huddy et al.’s partisan identity scale, which has its origins in the Luhtanen and Crocker (1992) collective self-esteem scale; it captures nuance in the strength of the identity as well as psychological attributes of identity. The scale is composed of the four questions given in Table 8. To create a single measure, I sum the coded values of the selected response items and normalize them to create a scale that runs from 0-1, with higher values representing a stronger identity.

proprietary point system. Before participating in the study, respondents provide consent at the entry page of the survey. If the participant consents to participate, they are shown instructions for the survey and asked to complete the survey on Qualtrics.

Table 8: Adapted Huddy et al. Scale

| Adapted Huddy et al. Scale |
|---|
| “How important is being a [Democrat/Republican/Independent] to you?”/ “How important is this movement to you?” |
| Extremely important; Very important; Not very important; Not important at all |
| “How well does the term [Democrat/ Republican/Independent] describe you?”/ “How well does the term “supporter” describe you in relation to this movement?” |
| Extremely well; Very well; Not very well; Not at all |
| “When talking about [this movement/Democrats/ Republicans/Independents], how often do you use “we instead of “they”?” |
| All of the time; Most of the time; Some of the time; Rarely; Never |
| “To what extent do you think of yourself as being a [part of this movement/Democrat/ Republican/Independent]?” |
| A great deal; Somewhat; Very little; Not at all |

To obtain respondents’ relevant identities before subjecting respondents to the instrument determining identity strength, respondents were asked a series of questions to distill their most preferred social movement and political party. For social movements, respondents were asked which of the list of eight movements they had heard of; if they indicated having heard of none, the respondent was filtered out of the survey. Next respondents were instructed, “Of the movements you have heard of, indicate which movements you support and which you oppose.” Respondents were only asked about those movements which they indicated having heard of. Those not indicating support for at least one movement were also screened out of the survey. Finally, of those movements the respondent indicated having heard of, they were asked to ordinaly rank those movements from most to least favored. The most favored movement was then piped into the adapted social movement identity instrument.

To determine partisanship respondents were asked the standard ANES measure, “Generally speaking, do you usually think of yourself as a Republican, a Democrat, an Independent, or what?”. If they indicated “Other”, they were screened out of the survey. Those selecting “Independent” were then asked whether they leaned toward the Republicans, the Democrats, or neither. Respondents indicating “neither” were asked about their identity as Independents if assigned to the partisan identity instrument while leaners were asked their identity as a member of the party that they indicated leaning toward.

3.6.2 Experiment and Its Treatment Conditions

The experimental treatment asked respondents to think about politics as a member of a relevant social movement or political party in an effort to activate the identity, and each of these treatments is measured against a control prompt that asks respondents to describe their morning activities (for exact wording, see Banks and Groenendyk 2014). In order to activate a relevant movement or party, I solicit information about the respondents’ partisan preferences as well as the social movement that they most prefer from the curated list. I randomly assign each respondent into one of the three conditions.

3.6.3 Dependent Variables

McAdam and Tarrow (2010) suggest that “few citizens are deeply engaged in the party system...For most people, it is the proximate influence of the electoral campaign – not the party system that provides signals that guide them on public policy issues, that

tells them how to judge the political elite, and that identifies potential coalition partners” (533). As such, I focus on questions of participation that pertain to elections.

Table 9: Dependent Variables

| Dependent Variables |
|--|
| If a candidate affiliated with this movement/political party were running for office, would you vote for that candidate? |
| If a candidate affiliated with this movement/political party were running for office, would you donate money to that candidate? |
| If a candidate affiliated with this movement/political party were running for office, would you volunteer for that candidate’s campaign? |
| If a candidate affiliated with this movement/political party were running for office, would you volunteer for a get-out-the-vote or voter registration effort? |
| If this movement/political party held meeting in your area, would you attend? |

Each question offers response options including: definitely would, probably would, probably would not, definitely would not, and don’t know. For analytic purposes, these response options are collapsed to a binary of “probably would” and “probably would not”. Results including (in the “probably would not” category) and excluding “don’t know” are substantively similar, save the dependent variable on voting¹⁶. Those assigned to the control condition are asked about candidates for both a social movement and a party; those assigned to treatment conditions are asked about either a social movement candidate or a party candidate, respective of which treatment they received.

¹⁶ Excluding “don’t know” from analysis for the voting DV produces (nearly) perfect collinearity amongst social movement identifiers. Inclusion of this response category results in positive, significant participation for 75% of movements when conditioned on identity strength. The movement treatment remains insignificant across specifications. Results remain similar among party identifiers including or excluding “don’t know”.

3.7 Results

3.7.1 Reliability and Factor Analysis

In assessing the reliability of the Huddy et al. (2015) instrument in each of the eight social movements of interest, I find a minimum Cronbach's alpha of 0.7328 (Alt Right) with alpha scores as high as 0.8180 (Black Lives Matter). The identity measures thus meet conventionally accepted levels of scale reliability (0.7 or greater). Additionally, factor analysis of the scale by movement shows a single eigenvalue greater than 1, indicating a single latent dimension; results for these can be found in Appendix B.

Table 10: Internal Consistency and Reliability Scores for Select Social Movements

| Internal Consistency and Reliability Coefficients | | |
|---|------------------------------|-------------------------------|
| Test Scale = mean(4 unstandardized items) | Average Interitem Covariance | Scale Reliability Coefficient |
| Alt Right | 0.2153207 | 0.7328 |
| Black Lives Matter | 0.4986538 | 0.8180 |
| All Lives Matter | 0.4829676 | 0.8132 |
| MeToo | 0.4606996 | 0.7955 |
| RESIST | 0.3515929 | 0.7835 |
| Tea Party | 0.4196495 | 0.7935 |
| Secure the Border | 0.3280153 | 0.7250 |
| Women's March | 0.3915805 | 0.7730 |

3.7.2 Movement Identity

The results of the first survey indicate strong support for the presence of a social movement identity, and the second survey extends the initial findings. The results of both surveys can be seen through examination of Figure 9. Moreover, the average measure of social movement identity strength was consistent across surveys, lending support to Hypothesis 1, that social movement identity is demonstrably present among survey respondents. Survey 1 indicates that the proportion of individuals holding a social movement identity are quite high; 68% percent of the sample from the first survey hold at

least one social movement identity of some strength. The remainder of the survey sample either had not heard of any listed movements or did not identify themselves as supporting any of the movements they had heard of.

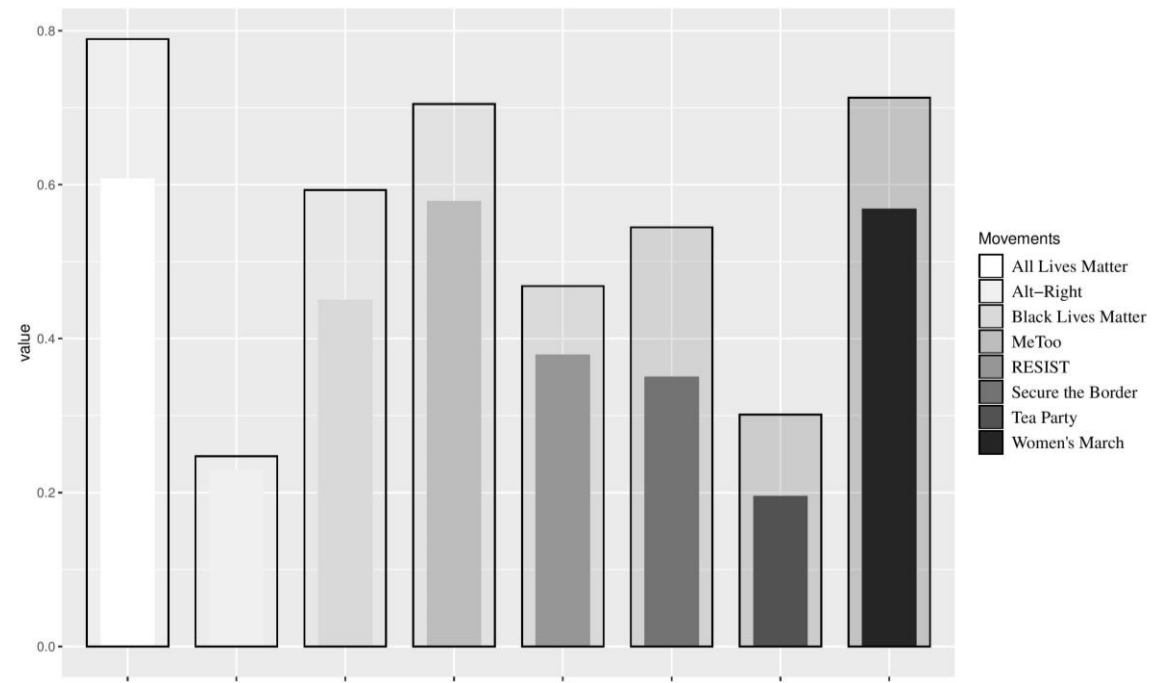


Figure 9: Proportion of respondents identifying with a movement across surveys

3.7.3 Determinants of Strength of Movement Identity

In seeking to understand the relationship between identity and social movements, I also explore the possibility of underlying demographic predictors of identification with the movements of interest. Regressing the identity strength scale against dummy variables for race and gender, I find, intuitively perhaps, that being black is a significant predictor of more intense identification with the Black Lives Matter movement while whiteness significantly predicts less intense identification. Being female is a significant,

positive predictor of stronger identification with the MeToo and Women’s March movements, and a significant, negative predictor for the Secure the Border Movement.

Table 11: Demographic Determinants of Movement Identity Strength

| Determinants of Movement Identity Strength | | | |
|---|----------------------|----------------------|-----------------------|
| <i>Movement</i> | <i>Black</i> | <i>White</i> | <i>Female</i> |
| Black Lives Matter | 0.1792616 (0.000) | -0.115984 (0.000) | |
| Me Too | | | 0.1061814 (0.000) |
| Secure the Border | | | -0.1004273 (0.001) |
| Women’s March | | | 0.1157398 (0.000) |

3.7.4 Strength of Identity and Participation

While few significant effects were found for the social movement and partisan treatments (Hypothesis 2b), logit regression shows positive, significant effects for the strength of movement identity, across all movement identities, in four of five participatory activities (Hypothesis 2a). Similar effects were documented for strength of partisan identity and self-reported willingness to participate.

Table 12: Strength of Social Movement Identity and Participation

| Strength of Social Movement ID and Participation | | | | |
|---|---------------------|---------------------|-------------------------|---------------------|
| | (1) Town Hall | (2) Campaign For | (3) Get Out the Vote | (4) Donate |
| Alt Right | 11.91** (3.917) | 11.68** (4.253) | 15.50* (6.243) | 7.243** (2.779) |
| <i>Movement Treatment</i> | -1.864 (1.565) | | | |
| Black Lives Matter | 6.110*** (0.771) | 4.743*** (0.662) | 4.183*** (0.627) | 4.506*** (0.657) |
| <i>Movement Treatment</i> | 1.979* (0.881) | 0.637 (0.610) | 0.813 (0.640) | 0.185 (0.605) |
| All Lives Matter | 5.184*** (0.711) | 4.808*** (0.701) | 4.878*** (0.700) | 5.359*** (0.757) |
| <i>Movement Treatment</i> | 0.495 (0.567) | 0.0842 (0.560) | -0.281 (0.563) | -0.582 (0.606) |
| MeToo | 5.588*** (0.709) | 4.469*** (0.651) | 3.102*** (0.587) | 4.393*** (1.978) |
| <i>Movement Treatment</i> | 0.276 (0.591) | -0.237 (0.618) | -0.137 (0.585) | -1.396* (0.638) |
| RESIST | 5.893** (2.062) | 3.974* (1.601) | 5.150** (1.753) | 5.547** (1.978) |
| <i>Movement Treatment</i> | | | -0.275 (1.592) | |
| Tea Party | 8.624*** (2.002) | 6.476*** (1.545) | 5.492*** (1.365) | 4.958*** (1.311) |
| <i>Movement Treatment</i> | | 1.425 (1.316) | 1.351 (1.280) | 1.122 (1.262) |
| Secure the Border | 4.352** (1.341) | 3.730** (1.255) | 3.846** (1.240) | 5.040*** (1.487) |
| <i>Movement Treatment</i> | -1.393* (0.592) | -1.178 (0.619) | -1.620* (0.646) | -2.169** (0.726) |
| Women's March | 5.645*** (0.875) | 5.533*** (0.881) | 3.774*** (0.749) | 5.658*** (0.939) |
| <i>Movement Treatment</i> | 1.022 (1.114) | 0.0528 (0.889) | | 0.209 (1.135) |

Standard errors in parentheses

* $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

Table 13: Strength of Party Identification and Participation

| Strength of Party ID and Participation | | | | | |
|--|--------------------|----------------------|-------------------------|---------------------|---------------------|
| | (1) Town Hall | (2) Campaign For | (3) Get Out the Vote | (4) Donate | (5) Vote |
| Strength of Party ID | 0.942* (0.437) | 1.309** (0.480) | 0.892 (0.470) | 0.958* (0.463) | -0.612 (1.213) |
| Partisan Treatment | 0.359 (0.206) | 0.390 (0.223) | 0.649** (0.222) | 0.0479 (0.215) | 0.0355 (0.546) |
| constant | -0.818* (0.340) | -1.717*** (0.382) | -1.504*** (0.375) | -1.132** (0.363) | 3.711*** (0.974) |
| <i>N</i> | 387 | 369 | 368 | 370 | 393 |

Standard errors in parentheses

* $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

There are a few potential explanations for the insignificance of Hypothesis 2b; all respondents were asked about their social movement and party identities shortly before being subjected to either the control or one of the treatment conditions. Asking about these identities such a short time before being subjected to the various conditions may have served to weakly activate the identity in those respondents assigned to the control condition; thus, the effects of the intended treatment were diminished. Moreover, the treatment itself is quite subtle; a stronger treatment may elicit clear differences between those respondents subjected to it and those placed in the control group. Rerunning this survey as a two-wave survey, soliciting respondents' partisan and movement preferences in wave 1 and activating the identity in wave 2 should alleviate this issue and allow for cleaner treatment effects. Alternately, given the omnipresence of politics in the current climate, we may be observing a ceiling effect on willingness to participate, such that artificial identity activation may have no additional effect beyond the activation taking place in the real world.

3.8 Discussion

I advance the scholarship on social movement identity (Allen et al. 2017), incorporating a stronger, more comprehensive measurement, for probing the existence and variation in strength of social movement identities. As a result, I chose a measure that accounts for a psychological identification to social movements. Both the social identity literature broadly and the specific literature on partisan identity offer perspectives indicating that identity is self-determined and comprised at least in part of one's sense of "one-ness" with a group.

I adapt the Huddy et al. (2015) scale of partisan identity to measure social movement identity because it captures the psychological aspects of identification, probing respondents' sense of belonging to, support for, and self-identification with a movement. Evidence from two surveys indicates the presence of social movement identity. These findings should encourage other scholars to pursue the study of self-determined social identities. Moreover, in recognizing social movement identity as a mobilizer, albeit an inconsistent one, with the ability to induce political participation, scholars should explore it as an explanation beyond the classic considerations of SES and social networks. I assess the utility of the Huddy et al. (2015) instrument in capturing social movement identities, and find that it is both reliable and indicative of a single latent dimension.

I find clear evidence to support the existence of a social movement identity. Replication is needed to confirm these findings, but the not only does social movement identity exist, it is a prevalent and strongly held identity. While activating a relevant

social movement identity failed to show support for the contention that identity activation is capable of inducing higher levels of participation, we do find a significant, positive relationship between strength of identity and willingness to participate in multiple political activities.

The answer to the question of why people participate in social movements is, at least in part, to further identity expression. The benefit of being in alignment with one's social movement identity, provides individuals with expressive utility. Social movements thus encourage rational participation in two ways. Social movement leaders subsidize the costs of participation for individuals by assuming a disproportionate amount of the costs of obtaining resources for the movement and its goal. Social movements also induce participation by activating identity, creating a need to for social movement identifiers to act in order to be in alignment with his or her identity.

Conclusions

In two-party, majoritarian systems like the United States, partisan voters are between a proverbial “rock and a hard place” when they find themselves dissatisfied with the “handling” of an issue, and by extension, find themselves dissatisfied with their own party. I seek in this line of research to answer how partisan voters can signal dissatisfaction with their party, particularly considering the nationalized state of US politics? I explore multiple possible answers, focusing largely on social movements. Social movements afford dissatisfied individuals a means of collectivizing to express their grievances, and, with some small probability, an opportunity to obtain substantive change.

To explore this relationship between movement-candidate emergence and voter support for social movements, I focus first on the Tea Party during the 2010 midterm election. Despite the very visible splash made by the Tea Party, I argue and indeed find support for the argument that Tea Party affiliation provided challengers no greater probability of defeating the incumbent in general or Republican primary elections, and demonstrate that prior political experience is the trait critical to electoral success. In examining an original, comprehensive dataset, I look first to the general election, where I find support for my expectations. In the primary, my findings are more mixed; I find that Tea Party candidates – but only those who are also quality candidates – are able to significantly reduce incumbent vote share, but not enough to affect the overall probability of reelection.

Given that this most visible recent movement was unable to significantly alter outcomes in the electoral sphere, the next “insurgent group” I investigate is women. The 2018 midterm elections were lauded as the “year of the woman”. While no single social movement emerges to rally female candidates to the ballot (though the presence of Women’s March organizations remain throughout this period), we observe an outsized increase in the number of women candidates, with many individual women citing the political climate and the policy choices of then-president Donald Trump as the catalyst for their run.

With my coauthors, we assess how women candidates fared in 2018 using the literature of supply- and demand-effects to investigate the extent to which these women were successful in using their grievances to attain office. We find that women candidates approached supply-side parity, and that the factors predicting the emergence of such candidates were consistent with those in the literature. However, we find that this healthy supply of candidates did not translate into winning elections at rates we would expect, suggesting demand-side explanations for candidate underrepresentation greatly affected the 2018 elections, particularly among Republicans. We close with a discussion of the implications of our findings for the study of female candidates in congressional elections.

Finally, in an effort to extrapolate from these findings, I draw on theories of both social identity and social movements to develop a theory of social movement identity and outline expectations about the relationship between the strength of politically salient identities and electoral participation. Using two original surveys and an adaptation of the Huddy et al. (2015) identity instrument, I demonstrate the reliability and internal

consistency of the instrument, find clear support for the existence of a social movement identity, and evidence for a relationship between identity strength and political participation. With this project, I've taken the first steps in exploring the demand for social movement candidates amongst a sample of the American public.

Appendix A

Candidate Emergence in 2018 Codebook

Variables are listed in left-to-right order of appearance in ‘candidates2018_formatted.csv’. Variable names are printed here in bold and can be found in the top row of the spreadsheet. Variable coding is explained when applicable. (E.g. some variable names include (_num) at the end. This means there is both a string/categorical variable and a numeric version, which is collapsed according to arrows or parentheses listed under the variable name.) Observations coded ‘99’ for any variable indicate information on the variable was not publicly available for the candidate. Listed variable names come from the formatted data. Variable names followed by an asterisk (*) were changed from the raw data. A list of changes in variable names can be found at the end of this document.

Variables

coder_name: string/categorical

Name of the coder who coded the candidate.

cand_name: string

Name of the candidate.

state: string/categorical

Name of the state in which the candidate ran (abbreviated).

district: numeric

The number of the Congressional district in which the candidate ran.

party(_full): string/categorical

The main party with which the candidate affiliated. In the collapsed variable (without the “_full” designation), the following designations are categorized as “OTH” for “other”:

AMP, DFL, NNE, REF, UN, UNI, UNK, GRN, LIB, OTH (52 total observations).

- R : Republican
- D : Democrat
- IND : Independent
- OTH: Other
- NPA: Non-partisan

open_seat: numeric/categorical

Whether the candidate ran for an open seat (i.e., in a district without an incumbent).

- 1: Open Seat
- 0: Incumbent

incumbency_status(_num): categorical(numeric)

Whether the candidate was the incumbent.

- I : Incumbent [Symbol] 1
- C : Challenger [Symbol] 0
- O : Open Seat [Symbol] 0

total_receipts: numeric

Total amount of campaign contributions the candidate received in the cycle.

indiv_contrihs: numeric

The total amount of contributions received from individuals (as opposed to PACs).

indiv_contribs_prop_ood: numeric

The proportion of contributions from individuals that came from outside the district in which the candidate ran.

date_of_birth: numeric/date

Candidate's birth date.

educ_level: numeric/categorical

The level of education attained by the candidate.

- 1: Less than High school
- 2: Some High school
- 3: Finished High school or GED
- 4: Trade certificate
- 5: Some college or associate's degree
- 6: Bachelor's degree from a university or college
- 7: Graduate or professional degree

gender: numeric/categorical

The candidate's (preferred) gender.

- 0: Male
- 1: Female
- 2: Non-binary (including transgender)

race_ethnicity(_num): string(categorical)

Race/ethnicity of the candidate.

- 1: White

- 2: Black or African American
- 3: Hispanic or Latino
- 4: American Indian or Alaska Native
- 5: Asian
- 6: Native Hawaiian or Pacific Islander
- 7: Other (please indicate in the space below)

sexual_orientation_nominal: string/categorical

Fine-grained categorical description of the candidate's sexual orientation.

sexual_orientation_aggregate: numeric/categorical

Collapsed version of the candidate's sexual orientation variable.

- 1: Heterosexual or straight
- 2: Homosexual or gay or lesbian
- 3: Bisexual
- 4: Other

religion_nominal: string/categorical

Fine-grained categorical description of the candidate's religious affiliation

religion_aggregate: numeric/categorical

Collapsed version of the candidate's religious affiliation variable.

- 1: Non-Christian
- 2: Protestant (e.g., Methodist, Lutheran, Episcopal, Presbyterian)
- 3: Catholic
- 4: Other Christian

- 5: None

military: numeric/categorical

Whether the candidate served in the military.

- 1: Yes
- 0: No

experience: numeric/categorical

Whether the candidate has previously held elected office.

- 1: Yes
- 0: No

trump_16: numeric

Two-party vote share for Donald Trump in the district in 2016.

incumb_16: numeric

Two-party vote share for the House incumbent in the district in 2016.

primary_type: numeric/categorical

Type of primary in which the candidate ran.

- 1: Open
- 2: Semi-open
- 3: Semi-closed
- 4: Closed
- 5: Other (top-two, etc.)

primary_turnout: numeric

The total number of votes cast in the primary in which the candidate ran.

primary_votes: numeric

The total number of votes cast for the candidate in the primary election.

primary_VS: numeric

The share of the vote received by the candidate in the primary election.

runoff_turnout: numeric

The total number of votes cast in the runoff primary election in which the candidate ran, if applicable.

runoff_votes: numeric

The total number of votes cast for the candidate in the runoff primary election, if applicable.

runoff_VS: numeric

If the candidate ran in a runoff primary election, the share of the vote they received.

gen_VS: numeric

Share of the two-party vote for the candidate in the general election.

gen_turnout: numeric

The total number of votes cast in the general election in which the candidate ran, if applicable.

gen_votes: numeric

The total number of votes cast for the candidate in the general election, if applicable.

primary_outcome: numeric/categorical

Candidate's outcome in the primary election.

- 1: Won

- 0: Lost
- 2: Runoff

ro_outcome: numeric/categorical

Candidate's outcome in the runoff election (if applicable).

- 1: Won
- 0: Lost

gen_outcome: numeric/categorical

Candidate's outcome in the general election (if applicable).

- 1: Won
- 0: Lost

Changed variable names from raw data → formatted

- individual_contribution → indiv_contribs
- proportion_out_of_district → indiv_contribs_prop_ood
- primary_turnout → primary_votes
- primary_total_turnout_ → primary_turnout
- runoff_turnout → runoff_votes
- runoff_total → runoff_turnout
- gen_turnout → gen_votes
- total_turnout → gen_turnout

Appendix B

Table 14: Factor Analysis: Alt Right Movement

| Factor Analysis: Alt Right Movement | | | |
|---|-------------------|-------------------|-------------------|
| <i>Variable</i> | <i>Factor 1</i> | <i>Factor 2</i> | <i>Uniqueness</i> |
| “How important is being a [Democrat/Republican/Independent] to you?”/ “How important is this movement to you?” | 0.7075 | -0.1025 | 0.4889 |
| “How well does the term [Democrat/Republican/Independent] describe you?”/ “How well does the term “supporter” describe you in relation to this movement?” | 0.7079 | -0.0676 | 0.4944 |
| “When talking about [this movement/Democrats/Republicans/Independents], how often do you use “we instead of “they”?” | 0.5541 | 0.1313 | 0.6757 |
| “To what extent do you think of yourself as being a [part of this movement/Democrat/Republican/Independent]?” | 0.6757 | 0.0705 | 0.5385 |
| | <i>Eigenvalue</i> | <i>Difference</i> | <i>Proportion</i> |
| Factor 1 | 1.76520 | 1.72794 | 1.2034 |
| Factor 2 | 0.03726 | 0.14373 | 0.0254 |

Table B.2: Factor Analysis: Black Lives Matter Movement

| Factor Analysis: Black Lives Matter Movement | | | |
|---|-------------------|-------------------|-------------------|
| <i>Variable</i> | <i>Factor1</i> | <i>Uniqueness</i> | |
| “How important is being a [Democrat/Republican/Independent] to you?”/ “How important is this movement to you?” | 0.7020 | 0.5071 | |
| “How well does the term [Democrat/Republican/Independent] describe you?”/ “How well does the term “supporter” describe you in relation to this movement?” | 0.8023 | 0.3564 | |
| “When talking about [this movement/ Democrats/Republicans/ Independents], how often do you use “we instead of “they”?” | 0.7401 | 0.4523 | |
| “To what extent do you think of yourself as being a [part of this movement/Democrat/Republican/Independent]?” | 0.8043 | 0.3530 | |
| | <i>Eigenvalue</i> | <i>Difference</i> | <i>Proportion</i> |
| Factor 1 | 2.33114 | 2.36556 | 1.1449 |

Table B.3: Factor Analysis: All Lives Matter Movement

| Factor Analysis: All Lives Matter Movement | | | |
|---|-------------------|-------------------|-------------------|
| <i>Variable</i> | <i>Factor1</i> | <i>Factor 2</i> | <i>Uniqueness</i> |
| “How important is being a [Democrat/Republican/Independent] to you?”/ “How important is this movement to you?” | 0.6071 | 0.1086 | 0.6196 |
| “How well does the term [Democrat/Republican/Independent] describe you?”/ “How well does the term “supporter” describe you in relation to this movement?” | 0.7985 | 0.0492 | 0.3600 |
| “When talking about [this movement/Democrats/Republicans/Independents], how often do you use “we instead of “they”?” | 0.7247 | -0.0939 | 0.4660 |
| “To what extent do you think of yourself as being a [part of this movement/Democrat/Republican/Independent]?” | 0.8292 | -0.0449 | 0.4660 |
| | <i>Eigenvalue</i> | <i>Difference</i> | <i>Proportion</i> |
| Factor 1 | 2.21890 | 2.19385 | 1.1330 |
| Factor 2 | 0.02505 | 0.16081 | 0.0128 |

Table B.4: Factor Analysis: Me Too Movement

| Factor Analysis: Me Too Movement | | | |
|--|-------------------|-------------------|-------------------|
| <i>Variable</i> | <i>Factor1</i> | <i>Uniqueness</i> | |
| “How important is being a [Democrat/Republican/Independent] to you?”/ “How important is this movement to you?” | 0.6625 | 0.5610 | |
| “How well does the term [Democrat/Republican/Independent] describe you?”/ “How well does the term “supporter” describe you in relation to this movement?” | 0.7591 | 0.4238 | |
| “When talking about [this movement/Democrats/Republicans/Independents], how often do you use “we instead of “they”?” | 0.7350 | 0.4597 | |
| “To what extent do you think of yourself as being a [part of this movement/Democrat/Republican/Independent]?” | 0.7742 | 0.4006 | |
| | <i>Eigenvalue</i> | <i>Difference</i> | <i>Proportion</i> |
| Factor 1 | 2.15484 | 2.17963 | 1.1671 |

Table B.5: Factor Analysis: RESIST Movement

| Factor Analysis: RESIST Movement | | | |
|--|-------------------|-------------------|-------------------|
| <i>Variable</i> | <i>Factor1</i> | <i>Uniqueness</i> | |
| “How important is being a [Democrat/Republican/Independent] to you?”/ “How important is this movement to you?” | 0.6536 | 0.5728 | |
| “How well does the term [Democrat/Republican/Independent] describe you?”/ “How well does the term “supporter” describe you in relation to this movement?” | 0.8140 | 0.3373 | |
| “When talking about [this movement/Democrats/Republicans/Independents], how often do you use “we instead of “they”?” | 0.6514 | 0.5756 | |
| “To what extent do you think of yourself as being a [part of this movement/Democrat/Republican/Independent]?” | 0.7817 | 0.3890 | |
| | <i>Eigenvalue</i> | <i>Difference</i> | <i>Proportion</i> |
| Factor 1 | 2.12526 | 2.15430 | 1.1640 |

Table B.6: Factor Analysis: Tea Party Movement

| Factor Analysis: Tea Party Movement | | | |
|--|-------------------|-------------------|-------------------|
| <i>Variable</i> | <i>Factor1</i> | <i>Uniqueness</i> | |
| “How important is being a [Democrat/Republican/Independent] to you?”/ “How important is this movement to you?” | 0.7298 | 0.4674 | |
| “How well does the term [Democrat/Republican/Independent] describe you?”/ “How well does the term “supporter” describe you in relation to this movement?” | 0.7260 | 0.4729 | |
| “When talking about [this movement/Democrats/Republicans/Independents], how often do you use “we instead of “they”?” | 0.6142 | 0.6228 | |
| “To what extent do you think of yourself as being a [part of this movement/Democrat/Republican/Independent]?” | 0.8286 | 0.3134 | |
| | <i>Eigenvalue</i> | <i>Difference</i> | <i>Proportion</i> |
| Factor 1 | 2.12349 | 2.17121 | 1.1669 |

Table B.7: Factor Analysis: Secure the Border Movement

| Factor Analysis: Secure the Border Movement | | | |
|--|-------------------|-------------------|-------------------|
| <i>Variable</i> | <i>Factor1</i> | <i>Factor 2</i> | <i>Uniqueness</i> |
| “How important is being a [Democrat/Republican/Independent] to you?”/ “How important is this movement to you?” | 0.6182 | -0.1386 | 0.5986 |
| “How well does the term [Democrat/Republican/Independent] describe you?”/ “How well does the term “supporter” describe you in relation to this movement?” | 0.7417 | -0.0834 | 0.4429 |
| “When talking about [this movement/Democrats/Republicans/Independents], how often do you use “we instead of “they”?” | 0.6059 | 0.1245 | 0.6173 |
| “To what extent do you think of yourself as being a [part of this movement/Democrat/Republican/Independent]?” | 0.7018 | 0.1027 | 0.4969 |
| | <i>Eigenvalue</i> | <i>Difference</i> | <i>Proportion</i> |
| Factor 1 | 1.79199 | 1.73976 | 1.1970 |
| Factor 2 | 0.05223 | 0.18361 | 0.0349 |

Table B.8: Factor Analysis: Women's March Movement

| Factor Analysis: Women's March Movement | | | |
|--|-------------------|-------------------|-------------------|
| <i>Variable</i> | <i>Factor1</i> | <i>Factor 2</i> | <i>Uniqueness</i> |
| "How important is being a [Democrat/Republican/Independent] to you?"/ "How important is this movement to you?" | 0.6657 | -0.0564 | 0.5536 |
| "How well does the term [Democrat/Republican/Independent] describe you?"/ "How well does the term "supporter" describe you in relation to this movement?" | 0.7438 | -0.0439 | 0.4448 |
| "When talking about [this movement/Democrats/Republicans/Independents], how often do you use "we" instead of "they"?" | 0.6374 | 0.0737 | 0.5883 |
| "To what extent do you think of yourself as being a [part of this movement/Democrat/Republican/Independent]?" | 0.8008 | 0.0290 | 0.3578 |
| | <i>Eigenvalue</i> | <i>Difference</i> | <i>Proportion</i> |
| Factor 1 | 2.04411 | 2.03274 | 1.1691 |
| Factor 2 | 0.01137 | 0.14483 | 0.0065 |

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Biography

Katelyn Mehling Ice is a 2016 graduate of Indiana University earning Bachelors of Arts in Political Science with Honors and Sociology, a 2020 Master of Arts in Political Science from Duke University, and a Ph.D. in Political Science from Duke University in 2022. She is the coauthor of, “Does a Partisan Public Increase Democratic Stability,” a chapter in *Research Handbook on Political Partisanship*. She was awarded the Graduate Student Affairs Internship, served as coordinator for the Political Science Speaker Series, an attendee of the 2019 James Buchanan Camp, aa two-time recipient of funding from the Democracy, Institutions and Political Economy Grant, and a recipient of funding from the Political Institutions and Public Choice Research Grant. She served as the inaugural president of the Duke Women in Political Science group in 2016 and has been a member of the Merze Tate Society since its inception in 2018.