Partisan Polarization in Congressional Nominations:

How Ideological & Factional Primaries Influence Candidate Positions

by

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Abstract

Whether primaries contribute to partisan polarization has sparked substantial scholarly and public interest in the twenty-first century. I approach this question by focusing on how the contexts of primary elections influence the position of nominees who emerge from them. Descriptively, this thesis documents the changing dynamics of congressional nomination, demonstrating that between 2006 and 2020 primaries became dominated by ideological differences between candidates proximate to competing factions, first in the Republican and then in the Democratic Party. These dynamics changed due to a combination of electoral incentives, regulatory reforms, and technological developments which shape the behavior of key actors during the nomination process.

I then consider the implications of these changes for partisan polarization, empirically testing three distinct mechanisms through which primaries might induce non-centrist position-taking. I find that even in contests about candidates' relative positions, primary voters do not selectively express preferences for non-centrist candidates, likely because they lack sufficient information to position same-party candidates. However, many candidates behave as if voters reward extremism, adapting their positions away from the center both between and within election cycles. This divergence is explained by a combination of candidate (mis)perceptions about primary voters' preferences and the influence of key 'policy demanders' active in the party network during the nomination.

These findings enable us to better appreciate how primary elections influence candidate positioning and provide a clearer understanding of the actors responsible for such contribution. This work therefore offers insight into intra-party organizational structures and candidate strategies in congressional nomination contests. Findings in this thesis can also help inform reforms targeting the institution of primary elections and correct common narratives about voters who participate in primaries. The implications of this research extend beyond the legislative nomination process, demonstrating alignment between the supposedly opposing trends of intra-party factionalism and inter-party polarization.

Zusammenfassung

Die Frage, ob Vorwahlen zur parteipolitischen Polarisierung beitragen, hat im 21. Jahrhundert erhebliches wissenschaftliches und öffentliches Interesse geweckt. In dieser Dissertation beschäftige ich mich mit den Kontexten von Vorwahlen und wie diese die Position der Kandidat:innen beeinflussen, die daraus hervorgehen. Ich dokumentiere die sich verändernde Dynamik der Kongressnominierung in den Jahren 2006 bis 2020. Ich liefere Beweise dafür, dass die Vorwahlen in diesem Zeitraum von Kandidat:innen dominiert wurden, die starke ideologische Differenzen zeigten und konkurrierenden Fraktionen nahestanden. Dieses Phänomen lässt sich zuerst in der Republikanischen, dann auch in der Demokratischen Partei beobachten. Die Dynamik änderte sich aufgrund einer Kombination aus Wahlanreizen, regulatorischen Reformen und technologischen Entwicklungen, die das Verhalten der Schlüsselakteur:innen während des Nominierungsprozesses prägen.

Anschließend betrachte ich, was diese Veränderungen für die parteipolitische Polarisierung implizieren. Ich teste empirisch drei unterschiedliche Mechanismen, die eine nicht-zentristische Positionsübernahme bei Vorwahlen hervorrufen könnten. Selbst bei Wettbewerben über die relativen Positionen von Kandidat:innen zeigen Wähler:innen in Vorwahlen keine Präferenz für nicht-zentristische Kandidat:innen; höchstwahrscheinlich, weil ihnen ausreichende Informationen fehlen, um Kandidat:innen derselben Partei zu positionieren. Viele Kandidat:innen verhalten sich jedoch so, als würden die Wähler:innen Extremismus belohnen, und passen ihre Positionen von der Mitte weg an—sowohl zwischen als auch innerhalb der Wahlzyklen. Diese Divergenz erklärt sich aus einer Kombination von (Fehl-) Wahrnehmungen der Kandidat:innen über die Präferenzen der Wähler:innen in Vorwahlen und dem Einfluss wichtiger „policy demanders“, die im Parteinetzwerk während der Nominierung aktiv waren. Diese Ergebnisse lassen uns besser verstehen, wie und warum Vorwahlen zur Polarisierung beitragen und bieten eine detailliertere Einschätzung der Akteur:innen, die einen solchen Beitrag verantworten. Mit dieser Arbeit gebe ich einen Einblick in innerparteiliche Organisationsstrukturen und Strategien der Kandidat:innen bei Kongressvorwahlen. Diese Ergebnisse können dazu beitragen, Reformen von Vorwahlen zu unterstützen und gängige Narrative über Wähler:innen in Vorwahlen zu korrigieren. Die Implikationen reichen über den legislativen Nominierungsprozess hinaus und zeigen eine Übereinstimmung zwischen den angeblich gegensätzlichen Trends des innerparteilichen Fraktionismus und der interparteilichen Polarisierung.

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Section One:
Candidate Nomination &
Congressional Polarization

1 Introduction

> *It's an open secret that the more conservative members of the party quietly support primary challengers to certain progressives as well…so the way I think about it is might as well be honest about it.*
>
> Representative Alexandria Ocasio-Cortez[1]

When Republican Jim Nussle retired from Congress in 2006, Democrat Bruce Braley decided to run for the resulting open seat in Iowa's 1st District. Braley had deep roots in the local community, having been born in the state and attended Iowa State and the University of Iowa. For the past twenty years, he had been a prominent lawyer in the district, serving as president of the Iowa Trial Lawyers Association. Before Braley could compete in the November election, he first had to defeat fellow-Democrat Rick Dickinson in a primary election.[2] Dickinson had several decades of experience in state politics, serving initially as a city council member, then for fourteen years as the mayor of Sabula, and, most recently, as a representative in the Iowa House of Representatives. In addition to his lengthy career as a public servant, Dickinson was a respected figure in the state party, having previously served as the chair of the Jackson County Democratic Party and as a delegate at the Democratic National Convention.

Both men argued that they were the best choice for the party faithful to elect a Democrat in a seat that, though represented by a Republican for the past sixteen years, had been trending Democratic at the presidential level.[3] In their primary campaigns, both candidates focused on their long records of service and deep personal connections with the district, touting their competence in both the private and public sectors as evidence that they understood the district's needs which would enable them to defeat a Republican opponent in November. Both claimed that their experience would help them deliver valuable federal resources from Washington D.C. to northeastern Iowa, and that their expertise would be an asset in producing good legislation once in Congress. Though policy differences between the candidates existed, little discussion of national policy positions featured in either campaign, and no comparison of relative positions was made by either candidate. Dickinson had a history of public service going back to the late 1970s and had taken positions—such as a belief that life begins at conception—that were potentially ideologically misaligned with a Democratic

[1] Quoted in Chávez (2019)
[2] Two other minor candidates also ran in the district.
[3] PVI of D+2 in 2006

primary electorate, but Braley refrained from attacking Dickinson on the grounds of positional incongruence or policy 'fit' with Democratic primary voters or the district.

Though the district appeared winnable for the party in an expectedly favorably year for Democrats, evidence of state or national party involvement or support for either candidate during the primary was scarce. Media attention consisted of coverage in the local *Telegraph Herald* and *Quad-City Times* in May and June 2006.[4] Beyond northeastern Iowa, the election went largely unnoticed. The two campaigns spent less than $400,000[5] between them and, perhaps as a result, fewer than 30,000 Iowans—less than seven percent of the district's voting age population—cast a Democratic primary ballot on 6th June 2006. Braley narrowly won the nomination and five months later he was elected to Congress, defeating Republican Michael Whalen in the November general election.

On 17th March 2020, Representative Dan Lipinski lost his re-election campaign in Illinois's 3rd District to a fellow Democrat. Two years previously, he had narrowly survived a primary challenge to his left by Marie Newman, scraping by with fifty-one percent of the vote. The second time around, Newman was successful in ousting Lipinski. Newman had a long history of activism including running a national anti-bullying organization and campaigning for gun control measures. Initially drawn into Democratic Party politics by Bernie Sanders' 2016 presidential campaign, Newman decided to become a full-time politician after Hillary Clinton's presidential defeat. Lipinski was a relative moderate in Congress[6] and was notable for some of his more conservative positions, especially on abortion and stem cell research.[7] Though specific issues motivated Newman's campaign, she attacked Lipinski's voting record from the left more broadly, arguing that he was "out of step with the Democratic platform" (Herndon 2020) and that her positions were more congruent with the preferences of the district in explicitly *ideological* terms.[8] In addition, she argued that a new type of politics and politician was needed, and that Lipinski was the product of an outdated form of machine-era politics rife with nepotism—Lipinski's father had represented the district before him—that needed to be transformed. Lipinski's personal shortcomings as a representative were framed as systemic issues and connected to questions of economic inequality and redistribution. Newman's policy

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[4] A particularly thorough interview with each candidate featured in the 21st May 2006 issue of *Quad-City Times* (Bruce Braley, Iowa 1st Congressional District Democrat Candidate Survey 2006; Rick Dickinson, Iowa 1st Congressional District Democrat Candidate Survey 2006).

[5] Braley spent $171,798 and Dickinson $128,702 during the primary, as per their 12P Federal Election Commission (FEC) Pre-Primary Reports.

[6] DW-NOMINATE score of –0.227

[7] Lipinski's position on the issue was not dissimilar to those of Rick Dickinson in the previous example, though he had aired his views in the national rather than state legislature.

[8] The district had a PVI of D+6 in 2018 and 2020.

positions, including her support for the Green New Deal and Bernie Sanders' Medicare for All legislation, featured prominently in her campaign material and informed the way she referred to Lipinski.

In her 2018 campaign, Newman had earned the endorsement of multiple national groups including MoveOn, Our Revolution, Justice Democrats, and the Progressive Change Campaign Committee. By 2020, she had added the support of multiple presidential candidates, including Elizabeth Warren and Bernie Sanders, plus formal endorsements from Representative Alexandria Ocasio-Cortez and Chicago Mayor Lori Lightfoot. These groups and individuals are commonly conceived as being aligned with the Democratic Party's progressive *faction.* Following her narrow loss in 2018, in which she spent $401,480, activist groups and individuals in her network increased their support, enabling her to spend $641,073 in her successful 2020 challenge. Indeed, Newman's narrow 2018 loss, rather than signaling to supporters that she was not a viable candidate, served to indicate her strength and Lipinski's vulnerability. Newman's primary campaigns attracted national (C. Peters 2020; Stolberg 2020) and international (Sugarman 2017) media coverage, including a lengthy interview in *The New York Times* (Herndon 2020) where the contest was interpreted as having wider significance for the future direction and identity of the Democratic Party. The 2018 primary brought 95,205 voters (just under eighteen percent) to the polls and the 2020 contest exceeded six-figures, with 103,859 voters (over nineteen percent) turning out.[9] Newman, like Braley before her, then won the November general election, taking her seat in Congress in January 2021.

The above primary contests have been chosen to illustrate a narrative that low-interest candidate-centered nominations focused on personal competence and connection to the district have become infused with factional intra-party conflict in ideological terms, though these examples are far from unique. Indeed, a plethora of alternatives from either major party could have been used to document a similar story of the changing landscape of primary competition in the twenty-first century. Throughout this thesis, I argue that a fundamental transformation of the dynamics of competition in congressional primary elections have taken place between 2006 and 2020.

During this period of transformation, criticism of the institution of partisan primaries for exacerbating partisan polarization in Congress has grown ever louder (Alvarez and Sinclair 2015; Foley 2022; Schumer 2014). In this thesis, I attempt to understand the relationship

[9] The 2020 Democratic presidential primary was held on the same day and likely boosted turnout figures, hence the additional inclusion of the 2018 figures.

between these contemporary trends, focusing on the period when these narratives have gained popular traction and primary transformation has occurred. To date, much of the academic literature considers the evolution and impact of primary elections since their inception (see e.g., Hirano and Snyder 2019) or across many decades (Boatright 2014). Furthermore, little academic work to date explicitly analyzes the diverse mechanisms through which primary elections may contribute to polarization. Focusing on the era in which primaries have transformed and associated criticisms have emerged, I examine how the dynamics of contemporary primary competition influence the positions of nominees who emerge from them.

1.1 Ideological & Factional Competition in Primaries

Congressional primaries have existed for over a century and their introduction was followed by a sustained period of declining polarization, meaning any claims about their polarizing effect must first demonstrate that something about congressional nominations has changed. The first objective of this thesis is therefore to determine the extent to which the examples of Braley, Dickinson, Lipinski, and Newman are generalizable. In other words, how often did competence and experience-based nominations transform into contests motivated by the distinct policy platforms of the leading candidates? Why did partisan groups and individuals, the media, and primary voters care so little about Braley or Dickinson and so much about Newman and Lipinski? Have the reasons for primary elections changed, particularly in terms of ideological campaign framing and support from distinct groups in the party? And are these trends consistent across incumbent, open, and challenger[10] primaries in the Republican and Democratic parties?

To better understand the changing dynamics of congressional nominations during this period, I use the concepts of ideological and factional primaries. *Factional primaries* are contested congressional nominations where the leading candidates are aligned with and receive support from distinct groups and individuals in their party. *Ideological primaries* are contests that are discussed in ideological terms by the leading candidates competing in them, where candidates' reason for running for Congress invoke positional difference from their intra-party opponent(s). In other words, factional primaries are a measure of candidates' intra-party *support*, with diverse actors within the party expressing preferences for different candidates. Ideological primaries are an indicator of *framing*, with candidates' campaigns and media interviews referencing intra-party differences in terms of distinct policy preferences or citing

[10] In line with existing literature, the terms incumbent primary, challenger primary, and open primary are used to denote a nomination contest where the current office holder is standing for the party, for the alternative party, or not standing, respectively.

opposition to their opponent(s) on positional grounds as their motivation for running for congress.[11]

Using the concepts of ideological and factional primaries, I demonstrate that in 2006 most contests looked like the competition between Braley and Dickinson. By 2020, most primaries in both parties had transformed into ideological framed contests where candidates received support from different factions in the party network, as in the example of Newman and Lipinski. The proliferation of ideological and factional primaries therefore represents a transformation in the *dynamics* of congressional primary competition. The identification and documentation of the new dynamics of primary competition—including a higher frequency of contested nominations, factional intra-party support, ideological reasons for contests, increased campaign spending, and higher voter turnout—between 2006 and 2020 is one contribution of this thesis. These changing dynamics help us better understand intra-party conflict during the congressional nomination process.

If the dynamics of congressional nominations have shifted so fundamentally, it appears vital to understand why they have done so. Several important structural changes in U.S. politics and society took place between 2006 and 2020, with ramifications for the behavior of key actors in primaries. Throughout the period, partisan competition increased in intensity and animosity, with growing ideological distance between party elites (McCarty, Poole, and Rosenthal 2006; Barbara Sinclair 2006; Theriault 2008), and closely fought elections for national institutions (Fiorina 2017; Lee 2016). Though nationally elected seats of power became more competitive, individual states and districts became safer for a given party (Cook Political Report 2017). Beyond Congress, voters' identification with and loyalty to a preferred party increased (Mason 2018), and impressions of the alternative party declined (Abramowitz and Webster 2018).

These changing electoral conditions offered new incentives and constraints to parties, candidates, and voters in primary elections. Regulatory reforms further changed the way primary campaigns were financed, altering the profile of donors to candidates and avenues through which candidates were able to raise money. Changes to campaign finance were particularly important for altering the balance of power between the formal and informal parts of party organizations (Masket 2009). Meanwhile, an array of technological developments, including an evolution of media ecology and transformative effects of internet access, have

[11] Though the two concepts are conceived independently, there is, unsurprisingly, significant overlap between them.

reconfigured the avenues available for candidates and other partisan groups to communicate in primaries.

The broader importance of these changes is largely contingent on their effect on general election nominees. If there has been no noticeable change in the identity of successful candidates, then interest in the dynamics of congressional primary competition appears little more than a curiosity for those among us deeply interested in the internal machinations and workings of the two major parties. Yet, primaries now garner attention from a far broader audience, chiefly as the alleged driver of partisan polarization in Congress, a topic that has come to dominate multiple sub-fields of political science and most been acutely diagnosed in the U.S. context.

1.2 Why Study Polarization?

Elite polarization in Congress has been growing since the late 1970s and reached unprecedented levels in recent years (Lewis et al. 2021; McCarty, Poole, and Rosenthal 2006). Primaries are now said to contribute to the growing ideological distance between members of Congress (Kamarck, Podkul, and Zeppos 2016; Schumer 2014), meaning it is this conception of polarization, rather than alternative measures such as mass partisan affect or the growing salience of partisan identity among the public (Mason 2018), that is the object of interest throughout this thesis.[12]

The radicalization of the Republican Party has perhaps been one of the most studied phenomena in recent years. In Congress, Republican roll-call voting scores have been moving rightward for several decades (Lewis et al. 2021). More recently, Republican legislators have adopted authoritarian rhetoric (Cowburn and Oswald 2020), and racialized anti-democratic sentiment has become prevalent in the party (Bartels 2020). The rightward movement of the Republican Party has driven asymmetric partisan polarization (Grossmann and Hopkins 2016; Hacker and Pierson 2006; Theriault 2013). Indeed, some public criticism of the framing of partisan trends as 'polarization'—rather than Republican radicalization—has focused on the stark positional movement and non-adherence to democratic norms in the modern Republican Party (J. Rubin 2021). Analyzing the intra-party dynamics of each party separately, this thesis explicitly centers the features of the congressional nomination process which have pulled Republican elites asymmetrically to the right.

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[12] I provide more comprehensive conceptual definitions and discuss the potential connections between mass and elite polarization—as well as the implications of these relationships for our thinking about the role of congressional nominations—in chapter two.

Though congressional roll-call scores in the Democratic Party have not moved left to the same extent, the party has also shifted on questions of identity, where "the party of Jim Crow has become the party of Barack Obama" (Hilton 2021, 7), and economics, where a self-identifying socialist garnered more than forty percent of the vote in the 2016 presidential nomination contest, carrying twenty-three states in the process. In Congress, numbers of progressives and further-left members, including those with connections to democratic socialism, have increased in recent years (Thomsen 2017a). Though empirical data indicate that Republicans are largely responsible for the emerging distance between partisan elites, the leftward movement of the Democratic Party, especially on social issues, has also been well documented (see e.g., Wehner 2019), including by comparatively moderate members of the party in Congress (Zengerle 2022).

The consequences of congressional polarization range from declining legislative productivity (D. R. Jones 2001) due to gridlock (Binder 2003), greater disconnect between citizens and their representatives (Bafumi and Herron 2010), the adoption of increasingly "unorthodox" procedures outside of formal institutional rules (Barbara Sinclair 2011), a decline in power relative to other branches of government (Carmines and Fowler 2017), and detrimental effects on policy implementation (Epstein and O'Halloran 1999). Committee procedures including bill mark-ups now receive input from a narrower range of experts, with lower levels of congressional oversight (Hetherington 2009). Perhaps most concerningly, a polarized Congress is delivering worse policy outcomes, with evidence that polarization has increased income inequality (McCarty, Poole, and Rosenthal 2006), and prevented action in areas such as criminal justice reform (Thomsen 2017b). Set against this backdrop, it should perhaps be unsurprising that congressional job approval has declined dramatically in recent years (Gallup 2022). Though polarization has been attributed with some positive consequences such as greater political awareness among the public (Zaller 1992) translating to higher levels of political engagement (Abramowitz 2010; Hetherington 2008), the phenomenon is broadly understood as a hindrance to the functioning of U.S. politics by academics, media, and the general public alike.

In short, polarization matters, and has been described as "the most serious problem facing the U.S. today" (Hall and Snyder 2015). Explaining this trend has been a central focus of political scientists who study party competition in the American context in the twenty-first century (McCarty, Poole, and Rosenthal 2006; Barbara Sinclair 2006; Theriault 2008). In this context, primary elections have frequently been attributed as exacerbating polarization, where

the porousness of party organizations and inclusive candidate selection processes have been said to pull elites in Congress toward their ideological pole (Jacobson 2000).

1.3 How Might Primaries Contribute to Polarization?

The period in which primaries have become more ideological and factional has coincided with growing criticism of the institution of congressional nomination as a source of polarization. Primaries are now said to elevate extremists at the expense of comparative moderates, exacerbating the trend of ideological distance between partisans in Congress. This thesis seeks to better understand the relationship between the new dynamics of primary elections and the position of nominees selected. Though primaries are often blamed for incentivizing partisan divisions in Congress, whether primaries do indeed contribute to polarization remains contested in the academic literature, and few empirical studies have attempted to understand the distinct processes through which such polarization may occur. In this thesis, I therefore hope to clarify both *whether* and *how* the modern dynamics of primary competition may have produced more 'extreme'[13] candidates for Congress by examining different mechanisms through which primaries may influence candidate positioning.

Primary election polarization theory contends that voters in primaries are more ideologically extreme than general election voters and so reward ideological candidates at the expense of comparatively moderate alternatives (Brady, Han, and Pope 2007; Burden 2001), with entire books written on the need to abolish partisan primaries to "mitigate mischief" (Alvarez and Sinclair 2015). Primaries have not only been lamented by scholars, with leading politicians arguing for the need to "end partisan primaries [to] save America" (Schumer 2014) and national media commentators warning that the current process of candidate selection may "destroy democracy" (Foley 2022). Though this narrative about primaries appears intuitive—and is now widely assumed to be true by many scholars, journalists, and politicians—empirical evidence on the subject is, at best, mixed and tends towards no polarizing effect of voters (Hirano et al. 2010; Sides et al. 2020). Despite these findings, positional difference between primary and general electorates is the most commonly advocated way in which the institution of congressional nomination is said to exacerbate ideological divisions in Congress. Oftentimes, this is the only mechanism of primary polarization considered.

If primary voters hold non-centrist positions, we may expect that they systematically prefer comparatively 'extreme' candidates when they compete with relative moderates in an

[13] I use the term 'extreme' in line with the established use in the primary election literature (see e.g., Hall 2015). 'Extremism' may result from positions far from the 'center', greater consistency, or some combination of these.

election. In such a scenario, primary voters' preferences would produce nominees further from the political center than would be selected under alternative methods of nomination. Throughout this thesis, I label this mechanism as the *selective effect* of primary elections, directly emanating from decisions on election day, or, in other words, because of voter choices. I find that, even when primary elections are explicitly fought on ideological and factional grounds, voters do not systematically express preferences for candidates further from the center, and nominees selected via contested primaries are not positionally distinct from other nominees. I therefore suggest that any polarizing effect of primaries is not a bottom-up process emanating from the preferences of voters.

Voter preferences are, however, not the only way in which the institution of primary elections might contribute to polarization. Focusing solely on the preferences and behavior of primary voters may mean we fail to fully appreciate the influence of primary competition on nominee positions. In this thesis, I also consider two further mechanisms through which primaries may exacerbate partisan polarization in Congress. These mechanisms do not test the expression of voter preferences but instead analyze the adaptation of incumbents and primary candidates both during and between election cycles. The full list of (potential) mechanisms of primary polarization are summarized in Table 1.1.

Table 1.1 Potential Mechanisms of Primary Polarization

Mechanism	Explanation	Target
Selective Effect	Voters prefer non-centrist candidates and so will systematically nominate them when they face moderate alternatives. Primary winners—especially those who win nomination contests concerned with intra-party positions (ideological and factional primaries)—will therefore be further from the center than other nominees.	All candidates
Between-Election Adaptative Effect	Incumbents perceive that the nomination process favors non-centrist candidates and so move away from the center between elections to minimize the threat from ideological and factional challengers.	Incumbents only
Within-Election Adaptative Effect	During the nomination phase of the election cycle, all candidates will adopt 'artificial' positions further from the center to appeal to their primary constituency. Knowing that voters dislike inconsistency, primary winners are then forced to hold these positions, presenting general election voters with polarized choices.	All candidates
Preventative Effect	Potential candidates perceive that the nomination process favors non-centrists and so moderates choose not to run for office. Among incumbents, this mechanism takes the form of retirements due to perceived non-congruence.	All candidates

A *between-election adaptative effect* might manifest in the form of incumbent movement toward an ideological pole (left in the Democratic Party, right in the Republican Party) between election cycles following a primary challenge on ideological or factional grounds. Following the emergence of an ideological same-party challenger, incumbent officeholders may attempt to signal partisan loyalty or ideological congruence by voting more consistently with their party. I demonstrate that when comparatively moderate incumbents

are challenged by same-party opponents with the support of the more polarized faction, their voting behavior moves significantly away from the center. Members of Congress hold these adapted positions for several further congresses. I find a smaller but similar effect in ideological primaries. In both ideological and factional primaries, this effect is larger among Republican than Democratic representatives.

The *within-election adaptative effect* is the third potential mechanism of primary polarization examined in this thesis. Primaries may induce *all* candidates away from the center during the nomination phase of the election cycle if they perceive a need to appease to an extreme primary electorate or other important party actors.[14] If candidates adopt non-centrist positions during the primary, nominees who win primaries will then likely retain these artificial positions afterwards out of fear of being labeled inconsistent, presenting general election voters with polarized choices. The expectation that nominees will retain these positions poses problems for measurement and observation, meaning I test 'artificial' positioning as revealed by the moderation of losing candidates after the primary. In an analysis of a single election cycle, 2020, I present evidence that Democratic candidates communicated artificial—or 'strategic' (Brady, Han, and Pope 2007)—positions in contested primaries. Republicans did not adapt their positions in this way. As with the between-election adaptative effect, this effect is most prominent in ideological and factional primaries. Winning candidates held their positions beyond the primary, indicating that contested nominations altered candidates' behavior in a way that contributed to a polarization of *choices* for general election voters.

Given the scope of this project, I restrict my analyses to whether primaries polarize candidates who choose to run. The question of candidate emergence, termed the *preventative effect* in Table 1.1—where potential moderate candidates perceive the nomination process as favoring non-centrists and so decide not to run—appears relatively settled (Thomsen 2014, 2017b). Among incumbent officeholders, this effect manifests in the form of retirements when members of Congress perceive they cannot win renomination due to positional incongruence with their primary constituency. Given the need to engage with different data about candidates that do not emerge, I only consider the polarization of candidates *after* they choose to run and who make it as far as the primary ballot. I am therefore interested in electoral pressures on candidates and incumbents *during* the primary phase of the election cycle, meaning I do not examine the preventative effect.

[14] These include donors, interest groups, members of formal party organizations, activists, and even friendly partisan media. The subject of policy demanders is examined in more detail in the chapter two.

Of the three mechanisms analyzed in this thesis, the selective effect is a direct result of the preferences of primary voters,[15] whereas the adaptative effects are a result of changing candidate behavior. Though I find little evidence of the first mechanism, I show that many candidates adapted their positions away from the center both between and within an election cycle. Though ideological and factional primaries therefore contribute to partisan polarization, their doing so is not the result of voter decisions, likely because of a lack of information about candidates' positions among the primary electorate.[16] Throughout this thesis, I find a divergence between voters' expressed preferences and candidate responses. Despite the weak-to-null evidence of a selective effect, I find considerable support for the adaptative effects, both by incumbent representatives between elections, and among all candidates within an election cycle. Primary voters do not systematically prefer candidates away from the center, even in contests featuring ideological framing and factional support. Yet, candidates running for Congress often behave *as if* they do.

I offer two explanations for the discrepancy between voter preferences and candidate behavior. First, voters are not the only important actors in primary elections, where influential groups of "policy demanders" (Bawn et al. 2012) play a crucial role during the nomination process (Hassell 2018; Masket 2009). These policy demanders include donors, activists, interest groups, and partisan media outlets, who hold distinct preferences and weald substantial power during the nomination. Even if these preferences do not align with those of their primary voters, or the district or state writ large, candidates may perceive and receive significant benefit from aligning with these actors. Second, I argue that the dominant narrative presented above of primary voters as holding 'extreme' policy preferences has shaped the behavior of those running for office, creating a misalignment between candidates' perceptions about and the reality of primary voters' positions. If candidates *perceive* that primary voters prefer non-centrist candidates, then they may change their behavior regardless of whether voters are sending this signal in elections. Candidate fears that ideological and factional primary elections are a source of polarization may therefore contribute to the growing distance between the parties in Congress.

In examining the distinct ways in which primaries may polarize, this thesis offers a deeper understanding of the mechanisms of congressional polarization that emanate from the nomination. Current theories about the polarizing effects of primaries focus almost entirely on

[15] Either due to positional congruence or for other reasons.

[16] A finding further supported by some small selective effects in incumbent primaries, where voters have the most information about at least one candidate, the incumbent.

the relative position of the selectorate and their ability to identify and select congruent candidates (Brady, Han, and Pope 2007; Burden 2001). Yet, almost half of primary voters cannot even remember their candidate's name immediately after voting (Bawn et al. 2019), raising significant doubts about voters' ability to discern comparative positions of multiple same-party candidates (see also Ahler, Citrin, and Lenz 2016). Indeed, many of the critiques of spatial models of voting are even more acute in low-salience elections where voters lack the informational cues provided by party labels. The common narrative of primary voters as rabid extremists with the requisite knowledge and inclination to nominate comparatively 'extreme' candidates may itself be influencing the behavior of elites, where popular and scholarly accounts about the preferences of primary voters may have inadvertently contributed to the problem they seek to decry. In doing so, this thesis questions voter-centered theories of primary polarization, instead contending that the behavior of elite actors—most prominently the candidates themselves, but also donors, activists, issue groups, and other politicians—should be the focus of our scholarly attention in these elections. Though the U.S. has one of the most open systems of candidate selection in the world, these groups remain highly influential during the nomination (M. Cohen et al. 2008; Hassell 2018).

Primaries play a vital role in determining who is elected to Congress, and—given the few viable parties in the U.S. electoral system—provide a crucial avenue for citizens to have a say about those who represent them. Competitive nomination contests are frequently viewed as a potential site of intra-party factionalism in both the theoretical and comparative literature (Basedau and Köllner 2005; Carty 2004) and though a rich literature focuses on the question of how "divisive primaries" influence general election outcomes (Fouirnaies and Hall 2016; Murakami 2008; Romero 2003), connections between patterns of intra-party competition during the nomination and the position of nominees selected remain understudied. By examining distinct mechanisms through which primaries may contribute to partisan polarization, I demonstrate new links between the dynamics of intra-party competition and established theories about partisan polarization. Though research on how inter-party competition shapes parties' internal cleavages, comparatively little scholarship exists on how intra-party factions influence the positions of parties. Given the increasing attention on the congressional nomination process, the importance of these relationships only appears to be increasing.

Epistemologically, questions of whether institutions of candidate selection matter are contested. Some behavioralists consider candidate selection processes as nothing more than a

byproduct of other political factors (Czudnowski 1975). Conversely, some neo-institutionalists position candidate selection processes as directly shaping the systems within which they exist (Gallagher and Marsh 1988). In summarizing this debate, Hazan and Rahat conclude, "we do not presuppose that institutions can explain everything, but rather that institutions matter" (2010, 7). I follow their institutionalist approach throughout, testing whether variation both in the presence and dynamics of contested primary elections influence the position of the party candidates who emerge from them.

Closer examination of congressional primaries may therefore serve to deepen our understanding of one potential cause of elite polarization. In doing so, we may also hope to learn more about the internal dynamics of both major parties. Data on congressional primary elections have historically been under-utilized due to the difficulty of collection, especially for low-salience candidates. These elections provide researchers with a much larger volume of data than presidential primaries, which are far more commonly studied. In presidential primaries, beyond the limitations associated with having a small number of cases, the sequential nature of contests means they may be ill-equipped to inform us about intra-party dynamics given the importance of momentum in determining outcomes (Abramowitz 1989). To date, research has been overly reliant on presidential primaries to tell us about intra-party dynamics.

The predicament that primary elections currently find themselves in, being blamed for multiple problems in the U.S. political system, is also having institutional consequences for the nomination process. Since Washington (2004) and California (2010) adopted top-two primaries—with the associated potential for a major party to be excluded from the general election ballot, often without the knowledge of most of their supporters—numerous other states have discussed, or are in the process of enacting, similar reforms to their primaries, with the explicit goal of producing more moderate candidates (Top-Two Primary 2022). Given the immediate real-world implications for primary elections, it appears increasingly important to understand not only *whether* but also *how* the nomination process might foster non-centrist nominees. As I demonstrate throughout this thesis, this mechanism is not as straightforward as popularly imagined. The necessity of this research agenda is therefore not only rooted in the need for greater academic clarity in this area, but also has direct implications for potential reforms to the candidate selection process.

1.4 Why Focus on Recent Primaries?

In the first decade of the twenty-first century, scholars theorized that elite actors in U.S. political parties had become more homogenous as the parties polarized, with declining numbers

of liberal Republicans and conservative Democrats in Congress (McCarty, Poole, and Rosenthal 2006; Theriault 2008). The past decade has, however, been notable for the re-emergence of academic interest in the intra-party dynamics of both major parties (Bloch Rubin 2017; Clarke 2020; DiSalvo 2012; Lucas, Galdieri, and Sisco 2022; Noel 2016). Theoretical literature posits that political systems where parties are few and far between are the most likely to be rife with intra-party factions (Basedau and Köllner 2005), and that parties will be particularly vulnerable to outsider candidates in periods of ideological polarization and few parties (Buisseret and Weelden 2020). In other words, the contemporary structure of U.S. political competition is exactly where we *should* expect to see fierce intra-party competition.

Though the trend of increasing elite polarization started in the twentieth century, the narrative of primary elections as a contributing factor has become more prevalent in recent decades. At the same time, the amount of data available about primary candidates has vastly expanded in the digital era. Yet, much of the scholarship on whether congressional primaries polarize also focuses on a longer timeframe and does not include digital data, prompting calls from some quarters of the literature for a more refined focus on the previous fifteen years (see e.g., Drutman 2021, 38), where digital sources enable data collection about the policy preferences and campaign strategy of even minor candidates. This thesis therefore focuses on the eight election cycles between 2006 and 2020. Focusing on this shorter timeframe may be particularly important if, as argued here, the dynamics of primary competition have fundamentally changed in recent years. One goal of this thesis is to provide a more comprehensive descriptive understanding of the trends of primary competition in the modern era, using digital sources to update previously identified historical patterns (Boatright 2014; Hirano and Snyder 2019). Given that one of the main hindrances to our knowledge about primary elections has been a lack of data about candidates, the digital era of campaigning marks a step change in our ability to understand primary elections both qualitatively and quantitatively. This thesis uses digital sources including candidate websites, press statements, and social media to undertake this task.

Focusing on recent primaries therefore enables a more granular understanding of the dynamics of primary elections to allow analysis of the distinct mechanisms by which primaries might induce or reward non-centrist position-taking by candidates. By doing so, it also advances our knowledge about the—potentially heterogeneous—effects of distinct types of nomination contests using the concepts of ideological and factional primaries. Most current studies investigating the effects of primary elections on polarization fail to account for this

variation and treat all contests alike. Given the distinct expectations of contests between candidates receiving support from different factions within the party network and who frame their candidacy in ideological terms, the failure to consider the dynamics of primary elections on positional outcomes constitutes an important gap in the literature. It is this gap that I seek to address. If, as I argue, the dynamics of primary elections have undergone a recent transformation, then studies focused on the effects of nominations over a longer period may fail to accurately capture the implications of current competition for candidate positioning.

1.5 Partisan Asymmetries

Given the raft of literature indicating partisan asymmetry in both the position (Hacker and Pierson 2006; Mann and Ornstein 2008; Theriault 2013) and identity (Grossmann and Hopkins 2016) of the two major parties, the analyses in this thesis are conducted separately for Democratic and Republican candidates. Descriptively, I present evidence that ideological and factional primaries became common in the Republican Party earlier than in the Democratic Party. These temporal differences likely contribute to some of the asymmetric findings in the empirical chapters, such as the longer-term positional movement among Republican incumbents following a primary challenge. Beyond this temporal difference it is clear than the Republican Party has radicalized in a way that the Democratic Party simply has not, where, by the end of the period, it was more willing to embrace violence (Kalmoe and Mason 2022; Kydd 2021). Throughout this thesis, I am explicit in drawing connections between this broad trend and the asymmetric incentives in primaries pulling Republican candidates further from the center.

Relatedly, I find a clear partisan asymmetry in engagement in congressional primaries by the formal party organizations, where the Democratic Party has been both more willing to engage in, and more successful at, supporting comparatively moderate or establishment candidates against progressives and outsiders. Willingness to support moderates and party 'regulars' (Noel 2016; Reiter 2004) helped produce a remarkably stable cohort of Democratic leadership in Congress throughout this period, with figures such as Nancy Pelosi, Jim Clyburn, Chuck Schumer, and Steny Hoyer holding key positions throughout the fifteen-year period of study. In contrast, Republican leadership was more volatile, with only Mitch McConnell holding a party leadership position throughout the period. Though some trends appear cyclical and relate to general election expectations, I find that many of the structural changes which have altered the dynamics of primary competition have impacted Republicans more than their Democratic counterparts. One reason that the impact of these forces has been felt to a greater

degree in the congressional Republican Party is the comparatively muted organizational response of the party establishment.

1.6 Research Questions & Structure

The thesis is structured around one descriptive and one analytical research question. The descriptive question seeks to understand changes in the dynamics of primary competition during the twenty-first century and explain their causes. The analytical question asks whether primaries foster the nomination of non-centrist candidates and is answered using the concepts of ideological and factional primaries. This second question has three sub-questions relating to the mechanisms through which primaries may polarize to understand *how* primaries might produce non-centrist nominees. RQ1 is answered in section two, with RQ2 and sub-questions answered in section three.

> **RQ1**: Have the dynamics of primaries, especially regarding ideological and factional competition, changed in recent years? And if so, why?
>
> **RQ2**: Are (ideological and factional) primaries producing non-centrist nominees? And if so, how?
>
> > **RQ2.1**: Do primary voters prefer comparatively 'extreme' candidates (*selective effect*)?
> >
> > **RQ2.2**: Do incumbents move position when challenged (*between-election adaptative effect*)?
> >
> > **RQ2.3**: Do candidates adopt artificial positions during the primary (*within-election adaptative effect*)?

To answer these questions, I proceed as follows. The following chapter introduces the theoretical and empirical framework, situating the research questions and contribution of this work within the wider academic literature. In doing so, I demonstrate alignment between the evolution of factions and trends of congressional polarization. Positioning my digitally sourced data against historic trends of primary competition enables longer-term comparisons against trends from the established literature and is used to justify the focus on the contemporary period. I also consider causal narratives about elite polarization in Congress, with particular attention on the contested role of primary elections and their relationship to broader theories about the role of electoral institutions in fostering polarization.

Chapter three introduces the original dataset used. The construction of a dataset that includes qualitative analysis of all contested primary competitions between 2006 and 2020 is one important contribution of this thesis to the primary literature. This chapter introduces that dataset and explains my use of sources, with an illustration of their benefits and

shortcomings to justify the use of multiple sources, including data from candidate websites and press statements about their relative position, support, and campaign framing against an intra-party opponent. For qualitative variables, I expand upon and justify decision rules made during the coding process and discuss their use in empirical models in the later chapters of this work.

Having situated this work in the wider literature and clarified data sources in section one, I then answer the first research question in section two. Chapter four considers the first part of RQ1, presenting evidence that congressional nominations have undergone a transformation in the period of study, with a proliferation of ideological and factional contests. The chapter demonstrates changes in primary competition across several different dynamics, showing that primaries moved away from being rarely contested, candidate-centered elections focused on valence factors that featured minimal policy content, little campaign spending or media attention, and low voter turnout. By the end of the period of study, contests were far more often contested and faction-oriented, featuring extensive policy content, messaging focused on sub-party alignment, and higher levels of campaign spending and voter turnout.

Chapter five answers the second part of RQ1, examining *why* the trends observed in chapter four have occurred. This chapter documents three important sets of structural changes that have taken place in the early twenty-first century: electoral incentives, regulatory reforms, and technological developments. These changes have elicited responses from policy demanders in the party networks, the candidates themselves, and, to a lesser extent, primary voters. These changes and responses in the Republican and Democratic parties have been distinct. The findings in this chapter are underpinned by a broader trend of nationalization in U.S. politics which hint at a new model of intra-party representation.

Section three then assesses the consequences of the changing dynamics of primary elections for partisan polarization in answer to the second research question. Chapter six considers whether factional challenges in primary elections *can* move representatives away from the political center in the most likely case, examining whether factional primaries helped to move the Republican Party to the right in the Tea Party era. Using a difference-in-differences design, I show that Republican representatives in districts with factional primaries moved further rightward than those from other districts. In these districts, factional candidates appear to have found a fertile base to elicit support, win elections, and provide a credible challenge for incumbents to respond to. Under these conditions, factional primaries can pull party elites toward an ideological pole.

Having established that primaries can play a role in reorienting elites, I test the distinct mechanisms through which primaries may polarize in the final three chapters. Chapter seven focuses on the selective effect emanating from the decisions of voters (RQ2.1). I first test voters' preferences for non-centrist candidates when they compete with comparative 'moderates' in ideological and factional primaries, finding that primary voters do not systematically prefer non-centrists in these contests. The chapter also considers the conditions under which primary voters prefer non-centrist candidates, finding some associations between non-centrist positioning and success among incumbents *only*, likely explained by the informational asymmetry about incumbents and other primary candidates among voters. Elsewhere, I find no evidence that primaries produce non-centrist nominees, even when contests are about candidates' relative positions. Finally, this chapter tests the theorized solution to polarization put forward by reform advocates: increasing the size of the primary electorate. I find no alignment between primary turnout and nominee position, indicating the limited potential of emancipatory reform efforts targeting voters. Taken together, these results indicate that any polarizing effects of primaries are largely disconnected from the actions of voters.

As discussed above, there may be polarizing effects of the nomination process outside of those caused by voters. Chapter eight answers RQ2.2, testing the between-election adaptative effect. Using a fixed-effects model, I test incumbent representatives' positional adaptation once an ideological or factional primary challenger emerges. When incumbents are challenged on factional or ideological grounds away from the center, they adopt less-centrist roll-call voting in subsequent congresses. In some cases, the effect of a factional or ideological primary challenge causes representatives to adapt their voting behavior away from the center for three or four further congresses compared to their colleagues. Incumbent representatives, fearful of being deposed by a same-party challenger, become more consistent partisans after they are subject to an ideological or factional primary. When challenged on non-factional or non-ideological grounds, representatives do not adapt their behavior in this way. These findings indicate that incumbents respond to ideological and factional primary threats by adjusting their position and is evidence of a between-election adaptative effect.

To answer RQ2.3, chapter nine considers whether candidates in the 2020 election cycle adopted artificially extreme positions during their primary campaign. Given the challenges of accessing suitable data to assess within-election positional changes, I construct an original dataset of candidate positions across an election cycle and conduct an interrupted time-series analysis to identify movement after a primary. This chapter uses a text-as-data approach to

position candidates based on their communication on Twitter throughout the 2020 election cycle. Artificial extremism is revealed among candidates who lose their primary election by moderating immediately afterwards. Given the pressure to appear consistent, candidates who win primary elections and advance to the general election cannot easily alter their communication between contests. Losing Democratic primary candidates moderated following their primary defeat, but Republican candidates did not. This effect is particularly prevalent in ideological and factional primaries. These findings demonstrate that the presence of primary elections can have a polarizing behavioral effect during an electoral cycle, and further highlight the asymmetric partisan incentives for candidates. Importantly for their contribution to polarization, winning candidates in both parties maintained their positions post-primary, indicating that positional adaptation to appeal to primary selectorates holds through to the general election, presenting voters with polarized *choices* in November.

In chapter ten, I conclude with an overview of how recent changes in primary elections relate to nominees' position, with further consideration of the implications of these findings. At the party level, I discuss the implications of both parties being not nearly so homogenous as metrics such as congressional party unity scores alone indicate. I also reflect on the media framing of primary voters as a source of polarization, with the results from chapters eight and nine indicating that beliefs about the ideological position of primary selectorates may well have contributed to the polarizing behavior of candidates. During the period in which this thesis was conducted, some media outlets have begun to reappraise their analyses of primary electorates, noting that voters themselves are not a source of polarization (see e.g., Skelley 2021). My hope is that this research adds to a growing recognition of the more nuanced ways in which the institution of primary elections and dynamics of intra-party competition relate to polarization in our contemporary partisan era.

2 Theoretical & Empirical Framing

Democracy is not to be found in the parties but between the parties.

E.E. Schattschneider[17]

Schattschneider's view of the role of political parties in the practice of democracy dominated the field of political science for much of the twentieth century. Indeed, for much of the period since this assertion, research on political parties largely focused on inter-party competition. Recent efforts to better understand the internal workings of political parties have led to a revitalized definition and understanding of what parties *are*, attracting greater academic attention to sub-party organizations and intra-party practices in the process. This chapter first introduces and defines key terms and charts their evolution within the literature, both in broad scholarly use and in specific application to U.S. party politics. Second, the chapter provides a historical overview of relevant trends in congressional polarization, intra-party conflict, and primary competition since the mid-twentieth century. I use these trends both to justify the focus on the period analyzed here and to enable analysis and comparison with longer-term patterns. This section also demonstrates alignment between trends of intra-party factionalism and elite polarization that are largely treated as separate in the literature.

Finally in this chapter, I consider the drivers of elite polarization. Whether primaries are considered as contributors to polarization is fundamentally connected to the preferences of the American public vis-à-vis elite positioning. If we understand the American public as having polarized, elite polarization can be understood as a direct consequence of diverging preferences across the country, as a representative response to voters' changing preferences. Alternatively, if we understand the public as having remained relatively moderate, diverging elite preferences are better understood as growing disconnect between ordinary Americans and those that represent them in Congress, with electoral institutions such as primary elections the likely driver. The debate over whether primaries polarize is therefore introduced in these terms using the theoretical expectations of spatial models and empirical data from previous studies.

2.1 Definitions

To proceed with any discussion of primaries and whether they serve as a source of polarization in Congress, I first define how several key terms are used throughout the thesis: political

[17] (Schattschneider 1942, 60)

parties, factions, and the contested subject of partisan polarization. In all cases, I rely on existing terms, offering a summary of debates surrounding contested definition and justification of my adoption or rejection of specific terminology where appropriate.

2.1.1 Political Parties

In the mid-twentieth century, political parties were understood as elite-oriented organizations concerned with achieving goals and objectives through formal structures, such as winning elected offices. In Schattschneider's view, political parties are best understood as "an organized attempt to get power" (1942, 35). Downs similarly positions political parties as a "team seeking to control the governing apparatus" (1957a, 25). These definitions conjure images of adversarial elites in a "competitive struggle for power" (Schumpeter 1942, 283) in inter-party battles. Political scientists in the mid-twentieth century viewed parties as *the* essential units for the practice of politics, as organized teams between which the practice of democracy takes place, most frequently encapsulated in Schattschneider's now-famous assertion that "political parties created modern democracy and modern democracy is unthinkable save in terms of political parties" (1942, 1). In the mid-twentieth century, parties were understood as hierarchical, top-down structures, with decisions made at an elite level and filtered down through formal organizations.

By the late twentieth century, reconsideration of parties was well underway. Schlesinger makes the case that understanding power distribution means looking beyond the established conception of party, arguing that "the formal structure is obviously not the real organization" (1984, 379). Aldrich's seminal *Why Parties?* (1995) positions political parties as simultaneously elite-centered and activist-driven, proposing that parties are controlled by elite actors while recognizing that competing interests—with distinct preferences and means regarding policy goals—played an active role within the party, and that groups or coalitions of party elites may band together to collectively advance their goals (1995, 283–84).

In the twenty-first century, a new conception of parties has emerged, often referred to as the UCLA school, situating formal actors at the center of an extended network (Bawn et al. 2012; M. Cohen et al. 2008; Herrnson 2009; Masket 2009). Understanding parties as broad coalitions of interests, the UCLA school's definition positions interest groups, activists, and even friendly partisan media as key players within the party (Koger, Masket, and Noel 2010). These groups have diverse preferences regarding policy and strategy, and either compete with other groups or cooperate in alliances. In this view, the party is made up of coalitions of policy demanders who are motivated by legislative outcomes and attempt to use the party apparatus

for their goals (Bawn et al. 2012). These coalitions come together to form 'big-tent' or "catch-all" parties (Kirchheimer 1966) ideologically broad political parties that are internally pluralistic rather than being narrowly focused.

Though groups within parties have been shown to be highly cooperative (Koger, Masket, and Noel 2010), understanding parties as coalitions of policy demanders lends itself to internal factional conflict, positioning parties as "fundamentally contentious institutions" (Hejny and Hilton 2021). Components of modern political parties enter politics with issue positions and align with like-minded actors to advance these preferences, even if it puts them at odds with other individuals, groups, or factions within the party network. Understanding both the Democratic and Republican parties as diverse groups enables reflection on the differences in power structures and porousness between U.S. parties and their equivalents in most other advanced western democracies, with formal membership structures and less inclusive nomination systems. Given the academic prominence of the UCLA school's definition of party and application to intra- and inter-party politics in the U.S., I follow this conception in understanding sub-party groups in congressional primaries.

2.1.2 Factions

As with terminology around party, definitions and understanding of the term faction have evolved over time, and, far more so than parties, remain contested today. James Madison provides an often-cited definition in *Federalist 10*, "by a faction, I understand a number of citizens...who are united and actuated by some common impulse of passion, or of interest, adverse to the rights of other citizens, or to the permanent and aggregate interests of the community" (1787, 1). Madison's definition is commonly understood as positioning factions *as* rather than *within* political parties. Factions aligned with parties until at least the Civil War, only after which becoming understood as being contained within parties (Ranney 1975). In definitional terms, then, these eighteenth-century factions are not quite the object of examination here. Despite his different definition, Madison's cautioning against the "mischiefs of faction" (1787, 2) has been influential in establishing negative connotations toward the term in American politics.[18]

Before discussing the term's modern application, it is worth acknowledging the relative paucity of scholarly work on factions. DiSalvo notes that "contemporary political science literature on national intra-party factions in America is thin and analytically underdeveloped"

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[18] The term 'partisan' similarly retains an unfavorable association, usually used to refer to individuals or actions perceived as divisive.

(2009, 29), with Reiter adding that "factionalism within parties is one of the most widely discussed but under theorized aspects of party politics...[with] little to develop taxonomic or developmental approaches to intra-party factionalism" (2004, 251). The scarcity of scholarly attention appears particularly acute when contrasted with the vast body of literature on political parties, which have become viewed as the de facto site of political competition in the modern era for two reasons. First, the formal and clearly defined structures and activities of political parties make them an easier point of reference when thinking about power. It is, for example, far easier to say whether a political figure is a member of a certain party than affiliated with a sub-party faction.[19] Second, and perhaps more importantly, is the persistent notion that partisan conflicts are *the* legitimate contests for power, as advocated by Schattschneider above. In considering the under-appreciation of the importance of party factions in the discipline of political science, Belloni and Beller suggest that—in no small part due to Madison's legacy—the term "continues to connote illegitimacy, if not malevolence and pathology" (1978, 6).

Though the importance of factions may have been under-appreciated, there has been no shortage of attempts to define the term in its current, sub-party, context. Modern understanding of faction as a party sub-unit was broadly discussed in literature from the 1940s, when regional variation was the main driver of intra-party variation. Definitions from this time include Lasswell's "any constituent group of a larger unit which works for the advancement of particular persons or policies" (1944) and Key's application in the single-party Democratic South as "any combination, clique, or grouping of voters and political leaders who unite at a particular time in support of a candidate" (1949, 16). Such definitions default to the term faction as party sub-units without requirements or consideration of alternative terms. Elsewhere in his work, Key conceived of factions as competing cohorts surrounding notable individuals within the party, with focus for the first time on nomination procedures (Key 1942).[20] Rose studied parties in 1960s Britain and sought to differentiate factions from *tendencies*, which he used to indicate a less established or organized party sub-unit; tendencies were ephemeral and lacked cohesion, whereas factions were semi-permanent sub-units with organizational structures (1964).

Academic interest in U.S. factions renewed following the McGovern-Fraser Committee and subsequent reforms to the presidential nomination process. These reforms resulted in

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[19] Though even this assertion is contestable in the case of figures such as Donald Trump and Bernie Sanders. U.S. political parties are, as argued, porous institutions.
[20] Analysis of faction did not feature until the book's third edition.

competitive Democratic presidential primaries in 1972, an unlikely winner in Jimmy Carter in 1976, and a sitting president receiving a serious in-party challenge in 1980. Heightened attention also brought criticism, with Sartori outright rejecting the term, arguing it lacked neutrality, was too ambiguous due to competing definitions, and failed to acknowledge the term's historical use. Sartori presents his preferred term of *fraction* as being unambiguous, neutral, and free of historical baggage (1976, 74). In response to a "lack of agreement on what factions *are*" (Zariski 1978, 32), scholarship in the late 1970s began establishing criteria that sub-units require in order to be considered as factions (Roback and James 1978). At the same time, Belloni and Beller began organizing factions by goals or structure, advocating that factions either cluster around leader's personalities or through common values,[21] and started to consider the consequences of faction for parties and governments within which they reside (1978, 437).

Party unity increased in the 1980s and early 1990s as the formal organizations re-established control over the reformed presidential nomination systems (M. Cohen et al. 2008). Scholarship on the subject of factions continued to develop, with Reiter (1981) advocating that major parties have *regulars*, factions who were concerned with maintaining the party's ideological position and focusing on pragmatic coalitions to get broadly acceptable legislation passed, and *realigners*, who are concerned with reshaping or changing the party, particularly in ideological terms. Academic consensus on the term faction became widely accepted at this time, with Rose's tendency and Sartori's fraction falling out of favor as scholarly work in the U.S. and beyond conferred status (e.g., Cole 1989). Definitions focused on the behavior of factions but remained embedded in the formal party apparatus, including Mayhew's view of a party faction as a "traditional organization that regularly competes for a wide range of offices against one or more traditional organizations of the same party in the same city or county" (1986, 79). These definitions frequently positioned factions as existing entirely within larger party organizations, as "nascent parties within parties, seeking to pour new wine into old bottles" (Ceaser 1990, 90–91).

In the first decade of the twenty-first century, academic literature commonly conceived of the major parties as having homogenized as they polarized (Brownstein 2008; McCarty, Poole, and Rosenthal 2006; Roberts and Smith 2003). Through a combination of partisan sorting (Levendusky 2009) and ideological polarization (Abramowitz 2010; Theriault 2008) parties in Congress became more ideologically coherent, with fewer conservative Democrats

[21] This division largely mirrors Hume's ([1742] 2002) earlier distinction between "personal" and "real" factions.

and liberal Republicans. Given the focus on partisan difference and the dominant narrative of homogenization alongside partisan polarization, scholarly attention on party factions dwindled.

In the past decade, new scholarship has begun to reconsider the role of factions in the polarized era. Diverse works demonstrate the importance of intra-party groups in shaping policy platforms, election strategies and outcomes, and organizational structures in both major parties (Bendix and Mackay 2017; Bloch Rubin 2017; Blum 2020; Clarke 2020; M. Cohen et al. 2016; DiSalvo 2012; Kamarck 2014b; Masket 2020; Noel 2016; Wineinger 2022). These works often follow the UCLA-school's conception of parties, meaning factions have come to be understood as evolving sub-party coalitions to meet policy and electoral goals. As an example, DiSalvo offers the following comprehensive definition with identifiable features:

> A faction, as defined here, is a party subunit that has (1) enough ideological consistency, (2) the organizational capacity, and (3) the temporal durability to (4) undertake significant actions to shift a party's agenda priorities and reputation along the left-right spectrum. Factions exist when some party members share a common identity, are conscious of differences that separate them from other party members, and cooperate on a range of issues (2012, 5).

In invoking the relation between faction and the ideological spectrum, DiSalvo's definition casts factions as influential in moving their host parties along the left-right continuum as the carriers of party ideology, and frequently the source of party policies. Elsewhere, he labels the connection between ideology, faction and party as "the conveyor belt of ideas" (2012, 32). In a similar vein, Sin positions ideology as central to any understanding of factions, claiming all factions are based on a shared ideology and policy preferences (2017, chap. 2). Empirically, Koger, Masket and Noel demonstrate that alternative categories of faction in the U.S. context—such as organizational or tactical differences—align with intra-party ideological differences (2010, 37). Following their lead, this thesis conceives of factional divisions as primarily ideological, with other dimensions of difference subsidiary or aligned.

Understanding factions as ideological implies that elites hold distinct policy views within the party's wide tent and participate in their faction to advance their preferences. Alternatively, individual politicians may perceive that their constituents hold certain positions and wish to signal allegiance via a faction in the hope of recognition and continued support at the ballot box (see Polborn and Snyder 2016). The second mechanism may incentivize members of Congress to join moderate factions in swing districts where they rely on some independent or alternative-party leaners for re-election. In safe districts, where re-election relies solely on partisan supporters, legislators are incentivized to join non-centrist factions as a signal of

partisan loyalty and ideological commitment. Under both mechanisms, members of Congress influence the party's position through factional affiliation, where factions provide linkage networks between like-minded activists, interest groups, and other informal party allies (DiSalvo 2009, 28). Factions are therefore important not just in understanding the ideological identity of parties but also how they operate since they are the structures through which parties develop ideas and organize these ideas into policy agendas in Congress.

The informal organization and "catch-all" (Kirchheimer 1966) electoral strategy of U.S. parties gives further power to factions, which operate as "miniature parties within parties" (Blum 2020, 12), fulfilling many of the roles played by parties in other democracies. Many of the recommendations of the influential American Political Science Association (APSA) report—*Toward a More Responsible Two-Party System* (1950)—such as developing and making commitments on distinct policy programs, have since been fulfilled by intra-party factions, who have served to make parties 'responsible.' Because America's major parties are large and ill-defined, factions are where changes in ideological positions, policies and electoral mobilization occur. As such, factions are best understood as an "institutional response to a party system that leaves little room for electoral influence outside of the two major parties" (Blum 2020, 8). In this way, factions play an active role in ideological positioning, pro-actively organizing to get candidates nominated, turning ideas into policies, and getting policies through Congress to become legislation. Looking at U.S. factions from Europe, they appear to be fulfilling many of the roles of party organizations.

Congressional factions can also offer legislators benefits by providing "selective incentives to cooperative members, transforming public-good policies into excludable accomplishments" (Bloch Rubin 2017, 4). Factions therefore enable politicians to take credit for, or associate more directly with, popular ideas and legislation. In addition, they provide a mechanism through which elites can distance themselves from policies supported by co-partisans. Factions can also help parties in elections, where smaller size and greater agility allow them to connect with voters as "sub-party brands" (Clarke 2020). Factions can expand the party's reach by engaging voters and groups outside the traditional party coalition. Placing factions as key actors in U.S. political parties enables clearer understanding of party and legislator activity, as well as giving insight into internal party struggles, which, under alternative election systems, may not be internal. Members of Congress are conscious of the unusual ideological breadth of their wide-tent parties, with progressive Representative Alexandria Ocasio-Cortez commenting; "in any other country, Joe Biden and I would not be

in the same party, but in America, we are" (quoted in Freedlander 2020). These intra-party cleavages are not limited to political elites, with widening divisions between same-party identifiers in the electorate driving increased intra-party polarization between moderate and more ideologically 'extreme' co-partisans (Groenendyk, Sances, and Zhirkov 2020, 1616).

Definitions of faction have evolved over time and vary from the general to the detailed. Scholarly usage and interest in the term has waxed and waned across the past seventy years, often in alignment with real-world events. This sub-section provided an overview of the evolution of the term within the discipline of political science and clarified its use in this thesis. The definition of faction I use is of flexible party sub-units with identifiable ideological characteristics. Having reviewed competing terms including fraction and tendency, and despite drawbacks highlighted by scholars such as Sartori, faction remains the best and most commonly used terminology to describe the sub-party entities under examination here.

2.1.3 Ideology

Given the definition of factions as having identifiable ideological characteristics, this sub-section clarifies the use of the term ideology in this thesis. Ideology is a widely used concept which includes issue positions and values and is therefore a useful way to understand political divisions between political elites such as candidates for public office. Converse—perhaps the most notable skeptic of coherent "belief systems" among the mass public—demonstrates that for elites such as congressional candidates, "dimensions like the liberal-conservative continuum...are extremely efficient frames for the organization of many political observations" (1964, 18). Gries similarly demonstrates that ideological labels remain stable over time and serve as strong indicators of policy positions (2017, 140). Treier and Hillygus add to Converse's work on elite ideology using data from the current polarized era to show that ideological labels function as effective proxies for issue positions, and concluding that "the belief systems of political elites in the United States are captured within a single dimension of ideology" (2009, 680). Literature on polarization finds that when elites are ideologically distant they become more ideologically consistent, leading to the sphere of politics being contested on an ideological basis (Hinich and Munger 1997). McCarty, Poole, and Rosenthal (2006) also argue that elite preferences across issues can be predicted based on a single dimension, and Bonica places ideology "among the most useful conceptual tools available to political scientists" (2014, 1). Even Sartori, a critic of the continuum, concedes it is "the most detectable and constant way in which not only mass publics but also elites *perceive* politics" (1976, 78, emphasis added).

At the elite level, ideology is best understood as an alignment of policy positions and values along a spatial left-right continuum (Knight 2006), to provide a "knowledge of what goes with what" (Poole 2005, 12), a space where issues require frequently updating.[22] Constraint across otherwise-distinct policy fields therefore requires some central organizing or guiding principles (Gerring 1998). Bawn et al. consider ideology as "a pattern of beliefs and preferences that recurs in the minds of many individuals, often as the product of value-based reasoning" (2012, 590). Given the focus on intra-party differences in this thesis, ideology is considered as a distinct concept to partisanship. Though notable accounts argue that ideology is nothing more than a brand created by parties to sell positions to voters (Downs 1957a), this thinking has been criticized for lacking explanatory value of intra-party heterogeneity (Noel 2013).

Using a single dimension of left-right ideology is not without challenges., the first of which is the problem of measurement. Though ideological values provide broad platforms from which policy positions or preferences may originate, these dimensions have the potential to deviate. Difference between values and policy positions is often conceived as being between *symbolic ideology* and *operational ideology.* Symbolic ideology refers to positions and views along the left-right continuum in broad terms, whereas operational ideology is grounded in the preferences of what policies the government should enact in specific areas. Ellis and Stimson differentiate these concepts among the public but find that "at the elite level...these are largely one and the same" (2012, 11). This thesis therefore understands ideology as a shared worldview leading to policy preferences. Given the apparent lack of divergence between symbolic and operational ideology among elites such as congressional candidates, this definition remains consistent.

A second challenge of using a single continuum is the distinction between different dimensions which may diverge, most commonly the economic and social dimensions. McCarty, Poole and Rosenthal (2006) measure two dimensions to construct the widely used DW-NOMINATE ideal point estimation of elite behavior, despite their assertion that a single dimension is sufficient. Bafumi and Shapiro attest to the salience of a single dimension as economic preferences have become "increasingly rooted in social issues and religious values...[with] an important underpinning in racial issues" (2009, 3), meaning a single dimension of ideology has become predictive at explaining policy positions. Given that elites'

[22] For example, the integration of civil rights issues during the twentieth century or digital privacy in the twenty-first.

economic and social positions had largely aligned by 2006, combining them into a single dimension is relatively unproblematic.

A third challenge in using the left-right continuum is the relatively poor ability to capture diverse preferences or mixed views, particularly among 'moderates' who make up a diverse subset of the population, including policy centrists, cross-pressured individuals, and the politically apathetic (Treier and Hillygus 2009, 698). As this thesis focuses on elite actors running for Congress, relatively few true 'moderates' are analyzed, though candidates who have scores away from the center in scaling estimations may be better understood as being more ideologically consistent than more 'extreme'. Accordingly, the appearance of extreme position-taking may, in fact, be nothing more than more consistent position-taking rather than an indicator that an individual holds very radical positions in any policy spheres.

To use the left-right continuum it is necessary to understand what lies in each direction. Among political elites, ideology can be understood as a spectrum from liberal as left to conservative as right.[23] Ideological division is central to political conflict between elites, which "is often a struggle between liberal and conservative sentiments over symbols, over policy, over even culture" (Ellis and Stimson 2012, 2).

American liberalism is broadly concerned with promoting government intervention to redress grievances in equality of opportunity. The resulting policies include redistribution of wealth, high investment in education, and guarantees about quality of living. Ingrained in this ideology is a belief in the power of government as a force for good. Liberals believe that government should regulate markets and other commercial interests which, if left unchecked, have the potential to negatively impact society by hoarding resources in the hands of a small minority. Liberals believe that minority groups should have rights protected against majority groups in society.

In contrast, conservatives believe that society functions best when government gets out of the way to empower citizens, families, and markets.[24] Conservatives question both the ability and the right of government to regulate, believing that the expansion of choice through the market is the surest way to ensure prosperity. Conservatives are against government interventions which they see as inefficient, wasteful, and as limiting individuals' choices. They believe that the role of government is to protect the right of property, defend the nation, and ensure freedoms, with a limited economic role beyond this. Social conservatives position

[23] Given the focus of this thesis, the terms liberal and liberalism are used in their American context throughout.
[24] Which conservatives contend are nothing more than aggregates of citizens.

government as having a strong role in protecting social and religious institutions which they believe provide norms to ensure society functions productively. Others at this end of the continuum, closer to the libertarian view, believe government has no place regulating social or economic aspects of American life.

In this section I contend that a single left-right continuum is an appropriate tool to assess the positions of political elites, in the case of this thesis, candidates running for Congress. Throughout the empirical chapters, I use this dimension, both to analyze differences within and between the major parties.

2.1.4 Polarization

The topic of polarization now dominates political science across various sub-fields, most extensively in the United States. Nevertheless, it is vital to clarify how the term is used here, especially given the plethora of definitions available. In its broadest definition, originating in literature from sociology, polarization is understood as either: the dispersion or higher variance of opinions, a flatter or more bimodal distribution of views, an increase in ideological constraint within and across opinion domains, or greater difference between paired social groups (DiMaggio, Evans, and Bryson 1996, 690). The differences in these definitions are explored and clarified here, with specific application to candidates for Congress.

One important feature of polarization is the reduction of dimensionality, in most accounts to one dimension, in congressional voting patterns (McCarty, Poole, and Rosenthal 2006). Elite policy positions have become reinforcing and predictive, with a decline in cross-pressuring issues which have been integrated into the dimension of party conflict. Legislators' positions on once distinct issues—such as income redistribution and abortion access—have aligned along partisan lines. Alternative dimensions of conflict now align with the economic dimension, producing greater issue constraint among members of Congress.

Polarization is often positioned as happening in two diffuse—but potentially connected—areas, among political elites and among the public. Elite polarization refers to divisions between elected officials, primarily in Washington D.C., whereas mass polarization refers to divisions between 'ordinary' Americans. Later in this chapter I review causal arguments in the literature which connect these distinct concepts, but for now it suffices to say that given the focus on candidates for Congress, elite polarization is the subject of interest here. The subject of mass polarization remains contested, with competing scholarship contributing to an ongoing debate (Abramowitz 2010, 2014a; Fiorina 2016b, 2017; Fiorina and Abrams 2009; Fiorina, Abrams, and Pope 2005). In contrast, scholarship is near united in

agreement that some form of elite polarization has taken place (Jacobson 2000; McCarty, Poole, and Rosenthal 2006; Theriault 2008; Thomsen 2017b). Elite polarization is most commonly conceived as greater ideological distance between partisans, where "the positions of the average Democrat and average Republican member of Congress have become more widely separated" (McCarty, Poole, and Rosenthal 2006, 26).

In line with the sociological definition given by DiMaggio, Evans and Bryson, definitions from political science now also recognize that polarization can be one of many things: "polarization might mean that the opinions of voters or members of Congress (or whomever) have become more dispersed. It might mean that the distribution of these opinions has become bimodal. It might mean more issue constraint, in Converse's terms. And it might mean that different groups are now further apart on issues" (Noel 2013, 165). Specifically, this thesis seeks to determine whether greater ideological dispersion—in terms of distance—of party candidates for congressional general elections during the period of study has been driven by the nomination process. Though partisan polarization as a form of mass identity or constraint may influence elite dispersion, the object of study here is the position of elites as it is this form of polarization to which primary elections are commonly framed as contributing.

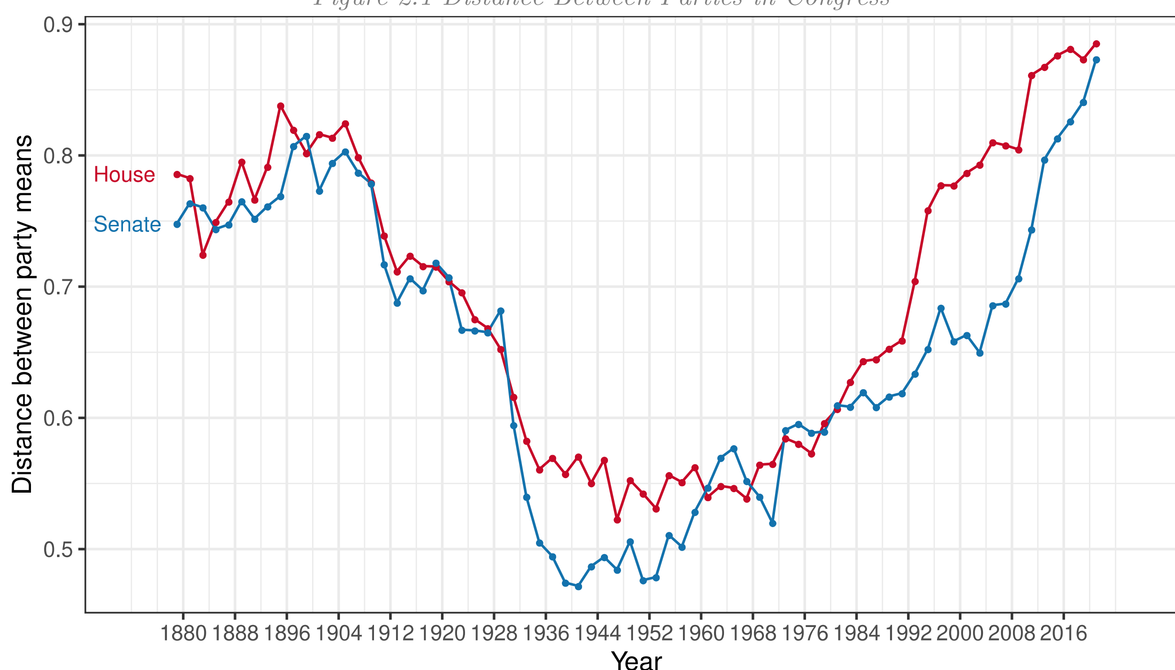
2.2 Congressional Polarization & the Evolution of Factions

In much of the literature on elite polarization, increasing intra-party ideological homogeneity and growing partisan polarization have been considered two sides of the same coin (McCarty, Poole, and Rosenthal 2006; Theriault 2008). As the ranks of conservative Democrats and liberal Republicans in Congress declined, both parties became more internally consistent and distinct from one another. However, recent research demonstrates several ways that intra-party factional conflict can exacerbate rather than reduce trends of partisan polarization (Blum 2020; Clarke 2020; Noel 2016). In this section, I document alignment between the—too often separately considered—trends of elite polarization and intra-party factionalism since the mid-twentieth century. This perspective serves to challenge the notion that homogenization and polarization are intrinsically connected and ensures that features of the modern factions identified in my empirical analyses are rooted in their historical context.

The rightward shift of the Republican Party is particularly visible through the changing intra-party cleavages since the mid-twentieth century. The positions and views of conservative groups within the party, once considered the more ideological faction, became party orthodoxy in the second half of the twentieth century, and these groups have since found themselves outflanked to the right in the twenty-first. In contrast, Democratic intra-party cleavages have

remained more consistent since the 1970s, with a progressive realigner faction further to the left and a more moderate regular group, though numbers of conservative Democrats in Congress declined throughout the period. In the late twentieth century, the power of organizations structured around the more moderate faction, such as the New Democrats, had helped this group become the established (or establishment) faction. These center-left groups have also co-opted groups further to the center, such as the Blue Dog Coalition, bringing them more ideologically into line. Asymmetry in factional conflict between the parties is reflected in data on polarization, with far greater rightward movement by Republicans, particularly since the 1990s (Hacker and Pierson 2006; Lewis et al. 2021; Theriault 2013). This section considers trends of polarization in Congress through the lens of party factions, demonstrating the alignment between factional intra-party dynamics and the parties' overall ideological positions.

Figure 2.1 Distance Between Parties in Congress



Source: (Lewis 2020)

The mid-twentieth century was so notable for an absence of ideological division between the parties that political scientists of the time perceived it as a threat to voter choice. In 1950, the American Political Science Association (APSA) authored a report advocating for a more responsible party system, lamenting that voters had no meaningful choice due to low levels of party cohesion, and calling for an "orientation of the American two-party system along lines of meaningful national programs" (American Political Science Association 1950, 96). Among the association's suggestions for reform was a need for more coherent national party platforms, greater organization and a more prominent role for outside groups who could provide meaningful difference, as the country required "political parties which provide the

electorate with a proper range of choice between alternatives of action" (American Political Science Association 1950, 15). Ranney also advocates for more cohesive and distinct parties in *The Doctrine of Responsible Government* (1954), with concern that a lack of clear electoral choices for voters threatens democracy. The mid-twentieth century—often heralded as a golden age of bipartisan compromise—was also historically anomalous, with clear ideological distance between the parties in Congress as the norm for much of U.S. history (see Figure 2.1).[25]

In the 1950s and 1960s, when parties were ideologically heterogeneous, intra-party ideological cleavages and factions reflected regional patterns. Significant numbers of liberal northern Republicans and conservative southern Democrats meant that the parties were not tightly bound in Congress, where bipartisanship and crossing the aisle were frequent. In this era, the parties in Congress were weak and partisanship in the electorate was low, with New Deal coalitions—established during a time of crisis that was extended by the Second World War—disintegrating as the sense of crisis faded (Rohde 1991). Hetherington (2009) argues that a deprioritization of economic issues, which had dominated and shaped divisions during the New Deal era, reduced the intensity of partisan division.

During this period, divisions within the Republican Party were between liberal or moderate Republicans such as Eisenhower, and the New Right. Eisenhower and his supporters in Congress oversaw large increases in federal government spending, visible in policies such as the expansion of social security and large-scale spending projects such as the Interstate Highway System. Conservatives in the party opposed Eisenhower on domestic spending, and on foreign policy issues such as United Nations membership. Similarly, the Democratic New Deal Coalition was an uneasy mix of liberal northerners and white conservative southerners which saw the party maintain control of both chambers of Congress for much of the following forty years. This divide frequently manifested between the legislative and executive branches, with conservatives exerting influence in Congress as liberals nominated their preferred candidates to the presidency. Democrats were ideologically divided along regional lines, with conservative Dixiecrats working with conservative Republicans in Congress. In this environment, Democratic speaker Sam Rayburn and majority leader Lyndon Johnson were happy to work with Eisenhower to pass legislation, marking a low point of partisan polarization.

In the Republican Party, the New Right fueled the growth of the modern conservative movement, advocating free market economics and a reduced role of government. The

[25] Though the partisan differences reached by 2020 represent a historic high in both chambers.

conservative faction became ascendent at the national level during the 1960s, nominating Barry Goldwater for president in 1964—defeating moderates Nelson Rockefeller and Henry Cabot Lodge—and gaining further power when Ronald Reagan was elected president of the Republican Governors Association in 1968. In this decade, many liberal Republican Governors on the east coast lost elections, moving the party's elites to the right. The party's voter coalition moved further rightward following the influx of white southern conservatives following Nixon's southern strategy after the 1964 Civil Rights Act. The act divided Democrats in Congress along regional and ideological lines, with white conservative southerners opposing the act. Rohde (1991) demonstrates that from the passage of the 1965 Voting Rights Act onwards there was greater polarization among white voters on racial issues, likely in response to cues from elites.

Divisions within the Democratic Party came to a head at the now-infamous 1968 convention, which not only reshaped the rules for presidential nomination contests but also defined Democratic intra-party cleavages for the following decades. The 1968 nomination process and convention fractured the party and caused new coalitions to emerge. To the center, the Coalition for a Democratic Majority—who would later evolve into New Democrats—declared that the party needed to move to the center to become electorally viable on a national level. Leftist groups who had supported Eugene McCarthy in 1968 for his opposition to the war in Vietnam also found new impetus to work together and advocated ideological opposition to the Republican Party to form the New Left. A third group that would become the Blue Dog Coalition were economic conservatives to the right of the New Democrats. These factions formed the basis of Democratic division from the late 1970s through to the period of study. Modern progressives are widely acknowledged as the ideological descendants of the New Left, and can be understood as the party's *realigner* faction against the center-left *regulars* (Reiter 1981).

In Congress, rule changes during the 1970s helped prolong the low levels of partisan conflict, where a decentralization of power from committees to subcommittees contributed to a decline in congressional partisanship (Rohde 1991). These institutional features meant that although the national parties, particularly at the presidential level, became more ideologically distinct during the decade, congressional parties "lagged behind" (Han and Brady 2007), with partisan sorting happening later, and high levels of split ticket voting in elections. Throughout the 1970s, many members of Congress had cross-pressured incentives as a result, with, for example, Republican members being pulled left by their constituents and right by their

national party. Though rule changes initially reduced the power of congressional leadership and weakened the ability of parties to control the policymaking agenda, these changes began to have the inverse effect by the end of the decade. With power removed from committee chairs, it moved to party leaders, making new members of Congress more indebted to the leadership, who could promote party unity and the taking of more consistent positions, where "each new speaker from McCormack through Wright was more inclined to exert policy leadership and employ the powers granted through the reforms than was his predecessor" (Rohde 1991, 16). By the end of the decade, institutional structures which had once help limit polarization were no longer able to contain the partisan ideological divisions. This widening partisan divide is particularly visible when considered through the parties' factions.

During the 1970s, factions in both major parties "underwent profound changes that corresponded to developments in the broader political system" (Reiter 2004, 267). Though policy content and relative power of these factions has shifted in the subsequent decades, the organizational structure has largely remained, with a persistent bi-factional structure in both parties (see e.g., Masket 2020). During this time, liberal Republicans continued to lose ground at the national level following party reforms. Lacking organized grassroots funding structures or affiliated PACs once Nelson Rockefeller became politically inactive, the faction also failed to establish think tanks, journals, or campaign organizations—areas in which the conservative movement excelled. As a result, liberal Republicans were no longer able to form a stable national electoral coalition, resulting in "the destruction of Republican liberalism as a force within the national Republican Party" (Rae 1989, 155) between the presidencies of Nixon and Reagan. In Congress, particularly the Senate, members held on longer, usually representing states in the northeast. By the 1994 midterm landslide, liberal Republicans were largely extinct in Congress save a few notable examples such as Arlen Specter[26] and John Chafee.[27]

In contrast to the party's liberal faction, conservative Republicans continued to gain power and influence during the 1970s, allying voters and members of Congress in opposition to a perceived liberalization of cultural values, and an economic program centered on the work of Milton Friedman and his Chicago Boys. In cultural terms, they were assisted by the growth of the Christian right, with groups such as Jerry Falwell's Moral Majority—founded in 1979—forming natural allies. Earlier in the decade, conservative groups had prioritized the promotion of family values following the *Roe v. Wade* 410, U.S. 113 (1973) Supreme Court ruling on

[26] Specter eventually 'sorted', matching his partisanship to his ideology in 2009 when he joined the Democratic Party.
[27] For a full account of the decline of liberals and moderates as force in the Republican Party see Rae (1989) or Kabaservice (2012).

abortion. In Congress, the conservative faction gained organizational power through groups such as the Republican Study Committee and the Conservative Opportunity Society, who ushered in more conservative members from the late 1970s onwards, with the 1978 class of representatives particularly influential. Theriault has dubbed this group *The Gingrich Senators* (2013), owing to the prominence of Newt Gingrich, who served as a Republican leader in the House of Representatives during the rise of this faction. At the national level, conservatives unsuccessfully endorsed Ronald Reagan for President 1976, succeeding with his nomination and election in 1980. These groups entered Congress and pulled the party starkly rightward, resulting in a rising partisan divide throughout the 1980s and beyond (Theriault 2013).

Among Democrats, reforms from the McGovern-Fraser Commission gave the New Left greater influence in presidential nominations, shifting power from politicians and labor leaders to the public (Ceaser 1979). The faction dominated Democratic presidential nominations between 1972 and 1988 with little success in general elections. In 1972, McGovern came from within the faction, and though Carter was more moderate, the faction supported him, before helping nominate Mondale in 1984 and Dukakis in 1988. In Congress, positions on the Vietnam War continued to dominate Democratic intra-party division during the 1970s (Polsby 1981, 172), and domestic cleavages largely foreshadowed those present in the party today. During this time, numbers of conservative Democrats declined as a consequence of southern realignment and Nixon's southern strategy which replaced conservative Democrats with conservative Republicans, a major driver of polarization in Congress (Theriault 2006).

In response to New Left victories in presidential nomination contests during the 1970s and 1980s, moderates reorganized in the form of New Democrats, with new organizational structure provided by the formation of the Democratic Leadership Council (DLC). The aim of these groups was to move the party to the center and make them more electable in the wake of resounding electoral defeats for liberal candidates in presidential elections throughout the 1980s. In the Republican Party, conservatives had almost full control of the party at both the presidential and congressional level throughout the 1980s. They remained close to Reagan throughout his presidency and in 1988 cautiously supported his successor George H. W. Bush, later distancing themselves when he attempted to raise taxes. During the 1980s, "the New Right became the governing establishment of the Republican Party" (Sin 2017, 35), and ideological affiliations of Republican members of Congress became more closely aligned with conservative positions.

The period between the late 1950s and 1980s has been described as a 'great broadening' of the role of government, where "government got larger not by doing more of what it already was doing but by getting involved in new issues where it had only limited presence before" (B. D. Jones, Theriault, and Whyman 2019). Initially, some of these new policy dimensions—such as international involvement or civil rights—cut across party lines. These cross-cutting cleavages initially prolonged the low levels of partisan animosity and meant intra-party splits—especially among Democrats on traditional issues such as social welfare—remained important. Over time, positions on these new spheres aligned along the partisan dimension, further contributing to polarization between elites and giving parties more scope to disagree about policy. Many of the divisions in new policy spheres shifted from the intra- to the inter-party level, reinforcing other partisan cleavages about longstanding policy positions and making parties more ideologically consistent.

In the 1990s, these partisan divisions increasingly focused on cultural issues, as depicted in James Davison Hunter's *Culture Wars: The Struggle to Define America* (1991), often directly linked to Pat Buchanan's emotive speech at the 1992 Republican National Convention. As the Democratic Party adopted neoliberal economic policies under Clinton, cultural cleavages became more salient, with Hunter arguing that social and moral issues, such as abortion, gay rights, and school prayer—where compromise positions are often more difficult to agree on—would come to define conflict. Further, as Hunter's title suggests, these issues served to intensify political conflict, with division over the identity and meaning of the American nation. These cultural cleavages were accentuated by Gingrich and the new Republican majority in the House of Representatives after the party's landslide 1994 mid-term victory and reached a further height during Clinton's 1998 impeachment trial. The greater distance between the parties in the 1990s was largely a consequence of the congressional Republican Party solidifying around conservative ideology, with reduced intra-party distance and fewer moderate Republicans in Congress by the end of the decade.

During the 1990s, establishment Democrats holding center-left positions were ascendent within the party, with the New Democrat faction dominating the party following the 1992 presidential nomination and election of Bill Clinton, who had vowed to be a "different kind of Democrat" (quoted in Hale 1995, 232). Throughout the 1980s, New Democrats advocated moderation, stating the need to move to the center to widen their appeal (Zelizer 2004). Clinton largely stuck to campaign promises advocating a reduced role of government—"the era of big government is over" (Clinton 1996)—by adopting market-oriented approaches,

passing significant welfare reform, and signing international agreements such as the North American Free Trade Agreement (NAFTA) and the General Agreement on Tariffs and Trade (GATT) against opposition from progressives within his party.[28]

Having been responsible for the party's successful 1994 midterms, conservatives remained ascendent in the Republican Party in the early years of the twenty-first century. Moderate Republicans in Congress became scarcer throughout the period. At the presidential level, conservative Republicans supported the Bush–Cheney ticket in 2000, in no small part due to the vice-presidential candidate. The faction supported Bush's conservative positions on cultural and economic issues, though disliked policies such as the No Child Left Behind education reforms (Greenstein 2003). The continuing rightward shift of the Republican Party in the 1990s and early 2000s was the main driver of the growing gap between the parties during this period.

By the early 2000s, moderate groups had solidified control of the Democratic Party with the support of the DLC, who had brought the now less-centrist Blue Dogs into their coalition in Congress (Thomsen 2017b). In the twenty-first century, this faction has commonly been conceived of as the establishment wing of the party. During this time, other than the replacement of the few remaining conservative Democrats, the party in Congress did not move leftward, resulting a period of asymmetric polarization. At the presidential level, the establishment faction continued their dominance through the nomination of Al Gore in 2000,[29] and supporting John Kerry against Howard Dean in 2004. Having spent the 1990s and early 2000s on the sidelines of the party, the progressive faction of the Democratic Party was re-energized by Dean's presidential campaign. The campaign's most important legacy was the founding of Democracy for America which built grassroots support for progressives.

In the 2000s, congressional partisan hostilities were only briefly quelled in the wake of 9/11, with party conflict over George W. Bush's policy decisions at home and abroad, the development of a permanent campaigning style focused on base turnout, and the administration's executive style (Edwards and King 2007). Indications of some leftward shift within the congressional Democratic Party at this time include the replacement of the

[28] For an overview of the relationship between Bill Clinton and Democratic Party factions during the 1990s, see DiSalvo (2012, 140–42)

[29] An election in which large numbers of progressive voters abandoned the party and voted for Green Party candidate Ralph Nader, likely determining the outcome in an election won by a razor-thin margin.

moderate Richard Gephardt with the more progressive Nancy Pelosi, who became minority leader in 2002 and then speaker in 2007.[30]

Following Dean's defeat, progressives successfully supported Barack Obama's candidacy in 2008, with minimal concern over his New Democrat policy positions and focused instead on broad messaging such as 'Hope' and 'Change We Can Believe In' and the image of a more inclusive America now willing to elect a Black president. Though most establishment Democrats supported Hillary Clinton in 2008, they were not openly hostile to Obama's candidacy, understanding that he was unlikely to pursue a progressive policy agenda. In 2016, establishment Democrats resolutely supported Clinton, perceiving Bernie Sanders' candidacy as significantly misaligned with their values and policy positions, and believing he would be unelectable to general election voters. Progressives perceived unfairness in the 2016 nomination process, which, when combined with the fallout from a general election defeat to "the most unpopular candidate in history" (Sanders, quoted in Worley 2017), left the party deeply divided along ideological lines. Intra-party conflict was rife not only among elites, but also within the Democratic voter coalition which was deeply divided towards the end of the period of study (Pew Research Center 2017, 4). The ideological intra-party cleavage between progressive and establishment candidates remained salient in the 2020 presidential primary, with opposition to Trump serving as the dominant unifying force.

Conservatives moved from being the Republican Party's realigners[31] to regulars in the second half of the twentieth century but began facing ideological challenges from the ideological right in the twenty-first. The 2008 election of Barack Obama and the subsequent formation of the Tea Party movement—stemming from a combination of White racial resentment to the nation's first Black president, and economic anxiety following the 2008 recession[32]—further divided the party in Congress. The Tea Party apparatus helped "reactionary Republicans" enter and gain influence in Congress, and laid the groundwork for the election of Donald Trump (Gervais and Morris 2018). This faction gained control of formal organizations in Congress such as the Republican Study Committee that were previously the domain of establishment Republicans. Between 2006 and 2020, the faction went from the sideline to the

[30] Pelosi was re-elected speaker following the 2018 mid-term elections. She is a particularly interesting case for analysis here, endorsed by the Democratic Socialists of America in the 1990s, she was a member of the Congressional Progressive Caucus until her elevation to a leadership position, she has often been described as having progressive policy preferences but establishment in her pursuit of legislative policy goals, working within the system and willing to compromise. She has faced criticism from some progressives in her party as a result.

[31] With the now non-existent liberal Republicans as the regulars to their center.

[32] The relationship between these two trends is often framed as economic anxiety stoking racial resentment, though closer analysis indicates causality in the other direction, where "the greater someone's level of racial resentment, the worse they believed the economy was doing." (Sides, Vavreck, and Tesler 2018)

center of the congressional Republican Party, further moving the party significantly to the right. The rightward shift of the party can also be observed at the individual level; when John McCain entered Congress in 1983, he was more conservative than sixty-five percent of Republicans in the House of Representatives, but by the time of his death in 2018 he was more liberal than eighty-one percent of Republicans in the Senate (Lewis et al. 2021).

The reactionary Republican faction should be understood as explicitly ideological and to the right of the establishment faction. As Skocpol and Williams write in *The Tea Party and the Remaking of Republican Conservatism*, "what distinguishes Tea Party supporters more precisely are their very right-wing views, even compared to other conservatives" (2012, 26; see also Abramowitz 2012). Though supporters aligned to this faction often call themselves independents as they do not identify with and are often hostile to established elements of the Republican Party, they are near-united in their dislike of the Democratic Party and overwhelmingly support Republican candidates. The rise of this faction can be understood as a re-emergence of a highly conservative tendency within the Republican Party dating back to the John Birch Society and sections of supporters in Barry Goldwater's 1964 presidential bid (Skocpol and Williamson 2012, 78). These supporters had been at least somewhat neutralized by the success of the establishment Republicans, whose move to the right had delivered party successes, particularly in retaining the presidency, where, between 1980 and 2004 they won five of seven elections.

In the second decade of the twenty-first century, establishment Republicans are commonly understood to have lost control of the party apparatus. By 2016, three of the leading candidates for the party's presidential nomination—Donald Trump, Ted Cruz, and Marco Rubio—were, to different degrees, aligned with the reactionary Republican faction. By the end of the period of study, Republican intra-party divisions were connected with proximity to President Trump. In 2018 congressional primary campaigns, candidates either chose to align closely with him in terms of policy and rhetoric, or not to mention him. Few Republican primary candidates brought up Trump negatively (two percent), with most abstaining from mentioning him or associating themselves with him (fifty-three percent).[33] A significant minority of primary candidates chose to openly embrace President Trump (thirty-eight percent) and when they did, they often defined their candidacy through this allegiance. As well as structuring elite behavior, Trump also structured divisions among Republican voters,

[33] Figures from Kamarck, Podkul, and Zeppos (2018b)

where "many of the divisions now center on the issues that have been front-and-center for Trump since he first launched his presidential campaign" (Pew Research Center 2017, 1).

The shifting position of Republican elites, with the adoption of policy positions further to the right, focus on cultural threats, use of overtly racist language, and open hostility toward the Democratic Party, has been the main driver of the decline in bipartisan activity in Congress (Mann and Ornstein 2012). Though progressives have gained a foothold in the congressional Democratic Party, evident in the growth of the Congressional Progressive Caucus (Thomsen 2017a), they have not been able to dominate the party in the way that "insurgent" forces have been able to "capture" the Republican Party (Blum 2020). Leftward movement of the Democratic Party in Congress is largely a result of the replacement of southern conservatives (Theriault 2006). Consequently, few moderates or cross-pressured members remained in either chamber or party by 2020, and polarization has been lamented as one of the main challenges to the functioning of the legislative branch. The movement of the congressional Democratic Party to the left and, *especially*, the Republican Party to the right is perhaps nowhere more visible than in the evolution of intra-party factions since the mid-twentieth century.

Alignment between patterns of polarization and intra-party factional conflict challenge the idea that intra-party homogeneity is a necessary condition for growing partisan conflict. Of course, both parties have become more ideologically sorted since the mid-twentieth century, but intra-party ideological differences remain salient in both parties. Indeed, theories about the role of primary competition in fostering elite polarization require that at least some candidates for Congress hold distinct positions within their party's wide tent.

2.3 Primary Competition in the Twentieth Century

Understanding how primary competition has evolved as the parties have moved apart at an elite level allows for historical comparison of the modern trends of primary competition identified in chapter four.[34] These trends are also used to justify the focus on the period from 2006 onwards.

The 1970s were notable for a particularly high level of incumbent primary competition, with speculation that this could mark the start of a trend of increased competition during the nomination (Boatright 2013, 31). However, the period between 1980 and 2004 instead saw a sharp decline in numbers of challenges to incumbents (Boatright 2013, 32). The anomalous

[34] For a thorough examination of the history of primary elections since their inception see Ware (2002) or Boatright (2014, chap. 2).

year was 1992, when a combination of disruptive redistricting,[35] the House banking scandal, expectations of a good year for Democrats, and a strong anti-incumbent tide resulted in nineteen representatives being defeated in intra-party contests (Boatright 2013, 33). As general election competitiveness declined after 1996 and more districts became consistently partisan,[36] the number of competitive incumbent primaries further decreased (Wasserman and Flinn 2017).

Incumbent primaries were not the only nominations which declined during this period: numbers of contested challenger primaries also decreased.[37] In an analysis of primary elections between 1908 and 2004, Ansolabehere et al. find that "primaries once often served an important screening role, but now they very rarely do...[because] the overall competitiveness of the electoral system has fallen" (2006, 18). Further work by the same authors indicates that the threat to incumbent members of Congress in primary elections has declined significantly (Ansolabehere et al. 2007). A decline in the rates of contested primaries, defeat rates of incumbents, and competitiveness (or fractionalization[38]) of the vote continued until the 2004 election. The 2004 electoral cycle was the low point both in terms of levels of primary competition and voter participation in the nomination process (Boatright 2014, 82). On both counts, 2006 represented a return to historically 'normal' levels, with the most challenges to incumbents in a non-redistricting year for over a decade.[39]

These trends provide important historical context to the findings presented in chapter four, which picks up this story by demonstrating descriptive trends during the twenty-first century. The 2006 electoral cycle is the start of this study for several reasons. First, it is the first cycle with comprehensive digital data about primary candidates, with most candidates having websites, and the launch of Ballotpedia in early 2007. Boatright comments that one reason for the lack of historical studies of primaries is the scarcity of data on candidates (2014, 21), particularly in low-profile contests where a candidate is unlikely to advance to Congress. Second, given that 2006 represents a return to 'normal' levels of incumbent and challenger contests following decades of decline, the cycle serves as a suitable benchmark for historical levels of primary competition.[40] Finally, the 2006 election is when several of the narratives and

[35] The 1992 cycle was the first time a new interpretation of the Voting Rights Act was implemented, meaning states with racially polarized voting were compelled to draw majority-minority districts if possible.
[36] Other data indicate a similar spatial partisan alignment, or geographic sorting, at county and neighborhood levels (Bishop and Cushing 2008; Enten 2018; but see Abrams and Fiorina 2012).
[37] Primaries may either be incumbent (incumbent running in that party's primary), challenger (incumbent running in alternative party's primary), or open (incumbent not running).
[38] See chapter three for an explanation.
[39] Historically higher rates of competition were not driven by the one-party south (Boatright 2014, 175).
[40] Open seat primaries remain susceptible to variation based on individual retirements for obvious reasons.

perceptions about primaries and polarization first emerge, such as the ideological challenge to Joe Lieberman. Starting the study in 2006 also enables analysis of contested primary elections over eight cycles up to and including 2020, a suitably lengthy period of study to understand structural patterns.

2.4 Drivers of Elite Polarization

Having reviewed the literature on intra-party factions and primary competition, I now turn to the question of partisan polarization and the role congressional nominations may play in exacerbating divisions between elites in Congress. Whether we view primaries as a potential source of polarization is intrinsically connected to the question of whether we understand the American public to have polarized or if political institutions—such as primary elections—have created a 'disconnect' between the preferences of ordinary Americans and those that represent them in Congress. This section therefore first considers the debate over whether the public has polarized, before discussing claims that representatives have become disconnected from the preferences of the public in recent decades. Finally, I address the potential contribution of the institution of primary elections, considering theoretical arguments, spatial models, and empirical data about the polarizing effect of primaries.

In introducing these distinct explanations regarding the role of the public in elite polarization, I demonstrate the application both of research that contends (Abramowitz 2010) and contests (Fiorina, Abrams, and Pope 2005) that the mass public have polarized to help frame my research questions and contribution. Elites in both parties now hold positions that diverge from their partisan median voters' that require explanation, yet to argue—as many proponents of institutional disconnection do—that the American public have been unchanging in their issue positions seems at odds with reality. I therefore attempt to understand the contribution of primary elections as a potential factor driving disconnect between voters and elites beyond the polarization of the public in recent decades.

2.4.1 The Public

One potential cause of partisan polarization in Congress is increasing division among the American public. In this understanding, elite polarization is not a reflection of institutional factors in the electoral system but instead emanates directly from an increasingly divided American public (Jacobson 2000). Put simply, this body of research contends that elites in Washington are divided because Americans across the country are divided.[41]

[41] Or, at least, the Americans that show up to vote are.

In the 1960s, Key argued that the electorate was attuned to ideological difference thanks to clearer cues coming from elites, asserting that "voters are not fools" (1966, 150). Modern studies indicate that the increasing salience of ideology and the end of partisan dealignment has produced "an electorate that is more strongly driven by liberal/conservative ideological concerns" (Bafumi and Shapiro 2009, 3). Attempting to separate the roles of partisanship and ideology in driving public attitudes and policy views, Gries argues that in the polarized era, partisanship has incorrectly been understood as more important than ideology as the central divide in American politics, with ideology serving as "a powerful bottom-up driver of attitudes" (2017, 132).

Elite polarization has also increased among party workers, issue activists and political donors (Fiorina 2017, 20), with Zaller (1992) demonstrating that views of the public are strongly shaped by elite messaging, meaning that "policy voting is more prevalent than partisan tribalism" (Fowler 2017, 1). A substantial body of literature indicates that much of the public now holds consistent ideological views which inform their political opinions and behavior (Abramowitz 2010, 2018; Abramowitz and Saunders 1998; Gries 2017; Jacobson 2000). This view is supported by data from the American National Election Study (ANES), showing that Americans now care much more about who wins elections, as well as holding less moderate and more aligned views on a range of issues, with a growing gap between Republicans and Democrats (Abramowitz and Saunders 1998) leading "toward an era of ideology" (Noel 2013, 78). Even independent identifiers who prefer one party now hold perceptions, preferences and behaviors in line with partisans of that party (Petrocik 2009).

The relative power of partisanship and ideology underpin the debate about whether mass polarization has occurred. Scholars agree that ideological divisions have become more closely aligned with partisan identity, but disagreement remains over causal mechanisms linking the phenomena. Scholars advocating that ideology drives partisanship find further evidence in the breakdown of New Deal coalitions in the 1960s and 1970s, which resulted in voters prioritizing policy platforms to identify electorally as ideological views began to cut across previous social cleavages at this time, where partisanship became increasingly dependent on ideological beliefs as social groups exerted weaker influence (Levine, Carmines, and Huckfeldt 1997). Following southern realignment, partisanship became more ideological and issue-oriented, with a stronger relationship between ideology and partisanship in the polarized era (Abramowitz 2018).

Several explanations are given for why Americans may have become more ideologically attuned. As the population has become more educated and increasingly exposed to partisan political media, it has moved away from the political center (Abramowitz 2010). Studies have long found a relationship between education level and non-centrist political views (Converse 1964) and the level of education among Americans substantially increased between the mid- and late-twentieth century (Abramowitz and Saunders 1998, 542). An educated population has developed increasingly coherent opinions on issues, producing more ideological thinking (Knight 2006). Other theorized sources of public division include geographic sorting (Bishop and Cushing 2008; but see Abrams and Fiorina 2012), which contends that a clustering of like-minded Americans has created self-reinforcing partisan neighborhoods, communities, and by extension congressional districts. Partisan media outlets and the fragmentation of the media ecosystem are also frequently blamed for creating a polarized public, theorized via several distinct mechanisms (Levendusky 2013; Mutz 2006; Prior 2013). Finally, scholarship arguing that economic inequality influences partisan division use data going back to the nineteenth century to show a close correlation between income inequality and partisan polarization over space (Garand 2010) and time (Dettrey and Campbell 2013; Gelman, Kenworthy, and Su 2010; McCarty, Poole, and Rosenthal 2003).

These diverse causal narratives share the view that elite polarization emanates directly from the preferences of the public. Accordingly, these accounts deemphasize the role of electoral institutions and structures—such as primary elections—as drivers of elite division. These accounts appear well positioned to explain the changing views of the American public over time, but remain ill-able to account for the continued differences between the ideological and issue positions of partisan voters and elites such as candidates running for Congress (Bafumi and Herron 2010).

2.4.2 Institutional Disconnection

Scholarship is, however, far from united in agreement that the public has polarized, with an alternative body of literature arguing that the appearance of polarization among the American public is a "myth" (Fiorina, Abrams, and Pope 2005). These accounts contend that, rather than having moved toward non-centrist ideological positions, the mass public has merely "sorted" (Levendusky 2009) along partisan lines. In this understanding, the public has only responded to changes in elite cues rather than contributed to them. As the major parties have become more distinct and identifiable at an elite level, partisan sorting has occurred due to a polarization of electoral *choices* (Fiorina 2017; Fiorina, Abrams, and Pope 2005; Levendusky

2009). These sources therefore appear better placed to explain the continued disconnection between the preferences of partisans in the electorate and elites such as candidates for Congress.

The view that the American public holds distinct positions directly contradicts prominent accounts from the mid-twentieth century—most notably Campbell et al.'s *The American Voter* (1960), and Converse's *The Nature of Belief Systems in Mass Publics* (1964)—that find the American public to be non-ideological. These works are critical of the notion that the public makes electoral decisions based on coherent ideological preferences, due to an "impoverishment of political thought" (Campbell et al. 1960, 543) which renders voters unable to differentiate between choices in ideological terms. Converse further demonstrates that public responses to politics are primarily social, with individuals tending to vote based on the preference of parents and other members of their social circles (1964, 20). Though it may be tempting to brand these findings as indicative of an era of bipartisan cooperation, doubts about the ideological responsiveness of the public continue today, with scholarly work updating both Campbell et al. (Lewis-Beck et al. 2008) and Converse's (Kinder and Kalmoe 2017) findings using modern data and methods. Other research finds that ideology is "rooted in symbolic considerations, group affiliations, and parental socialization rather than political issues" (Treier and Hillygus 2009, 682).

Advocates of sorting claim that it is the *choices* available rather than the ideological positions of voters that have changed, meaning "that the middle has no home in either party" (Fiorina 2017, 45). In this view, divergence has been driven by an elite or highly engaged subset of the electorate who have sought to polarize by moving to the ideological poles and clarifying what it means to be a Democrat or a Republican (Levendusky 2009, 6). Ordinary voters use these clearer cues to align their own ideology rather than change their partisan affiliation, because "partisanship is the dominant influence on ordinary citizens' behavior, whereas ideology is somewhat more malleable" (Levendusky 2009, 109). When the forces of partisanship and ideology come into conflict, most citizens resolve this dilemma by maintaining their partisan identity, giving the false appearance of having moved ideologically (Fiorina 2017, 112).

In practice, sorting contends that former liberal Republican and conservative Democratic identifiers among the public have simply aligned their partisanship and ideology by swapping the liberal and conservative rather than the Republican and Democratic components of their identities. As a result, advocates of sorting claim that the American public

has not significantly changed in ideological composition since the 1950s, and that only elites have moved away from the political center. Over-time trends of self-classification appear to support this view (Fiorina 2017, 24).[42] When the American public are asked about issue positions, responses have remained stable over time, and percentages of the population identifying as Republican, Democratic, and Independent have not greatly changed (Fiorina, Abrams, and Pope 2005).

Scholars advocating that the American public has not polarized also use data showing that most Americans do not follow daily news or engage intently with political issues as evidence that the level of engagement among most of the public is too low for them to be able to hold ideological positions (Fiorina 2017, chap. 2). Scholars who claim that the public has become more ideologically distinct agree that sorting has occurred but argue that the process has also led voters to follow cues from elites, adopting ideological positions away from the political center as they maintain their partisanship. In this view, as the parties have differentiated, voters' awareness and comprehension of ideological concepts have also increased (Abramowitz and Saunders 1998). These authors also cite the decline in split-ticket voting and greater ability of voters to differentiate between the parties' ideological or issue positions as further evidence. The electorate now—correctly—perceives greater ideological difference between the parties and cares more about electoral outcomes because parties have become more identifiable. These same data are taken by advocates of no-polarization-theory as nothing more than a dispersion of *choices* (Fiorina, Abrams, and Pope 2005).

The clearest historical example of the sorting of partisanship and ideology was the realignment of conservative Whites in southern states, who moved from the Democratic to the Republican Party. As a result, Democratic members of Congress became more liberal, with most southern Democrats representing majority-minority districts in the twenty-first century. Theriault shows that this switch alone accounts for almost half of the total polarization by the 1990s, with around two-thirds of polarization across both chambers due to replacement (selective) effects largely due to the replacement of southern Democrats by conservative Republicans (Theriault 2006, 483).[43] Other data indicate that non-southern Democrats have become only slightly more liberal since the mid-twentieth century (Barber and McCarty 2015).

[42] The veracity of self-placement in accurately capturing the ideological leanings of the public is contested, with alternative measures indicating that voters have formed a more cohesive ideological understanding in recent decades (Abramowitz 2010, 2018; Abramowitz and Saunders 1998).

[43] Adaptation by members of Congress, a topic returned to in more detail in chapters eight and nine, is "responsible for thirty-eight percent of the polarization between the parties in the Senate and thirty-five percent in the House" (Theriault 2006, 492).

Scholars who believe the public has not polarized acknowledge that elites in Congress have become more divided, leading them to propose alternative mechanisms for the emergence of this division. These mechanisms focus on the institutional features of the electoral system which have served to create a "disconnect" between the preferences of voters and representatives in Congress (Fiorina and Abrams 2009; Fiorina and Levendusky 2006). These accounts contend that ideologues and extremists hold disproportionate influence due to electoral institutions which exert a centrifugal pull, most notably in congressional primary elections.

I focus explicitly on primary elections in the following section, but advocates of institutional disconnect also propose several other mechanisms which are briefly worth our attention. Several of these alternative institutional explanations appear particularly weak at explaining party movement towards ideological poles. Gerrymandering is one such example, where empirical studies indicate that influence of gerrymandering is, at worst, minimal, where "the academic consensus is that gerrymandering matters anywhere from a little bit to not at all" (Thomsen 2017b; also see Abramowitz 2010; Carson, Engstrom, and Roberts 2007; McCarty, Poole, and Rosenthal 2006, 2009; Theriault 2008).[44] The effect of money in elections is cited as a further driver of polarization, with some evidence of the polarizing effect of big money (La Raja and Schaffner 2015). Yet, other studies raise concerns about the supposed polarizing effects of money and moderating benefits of reform (Masket and Miller 2015). One trend that may drive polarization is the growth in donations from individuals, who are more ideologically extreme (Bafumi and Herron 2010; Barber 2016; Stone and Simas 2010).

Other institutional arguments about disconnection focus instead on operations within Congress. These reasons include rule-changes that increased party-line recorded votes with unintended influence on the measures used to capture polarization, such as NOMINATE scores (Roberts 2007). The power of congressional leadership has also increased in recent decades (Theriault 2008), with partisan unity and out-party obstructionism incentivized (Lee 2009), in part due to the prolonged "era of tenuous majorities" (Fiorina 2016a) in highly competitive national elections. Other accounts point to changes in the working environment weakening the 'social fabric' of Congress, including shorter working weeks in the legislature, fewer bipartisan delegations, and more time spent by members in their districts or fundraising (Alduncin, Parker, and Theriault 2017). Consequently, members of Congress are less likely to form

[44] The gerrymandering argument is further weakened when the Senate—which has polarized despite the permanence of state lines—is considered.

personal relationships with members from the other party which previously helped to foster cross-partisan civility and trust between members. Finally, moderate candidates are self-selecting out of the congressional recruitment process prior to the primary (Hall 2019), perceiving minimal likelihood of success or benefit of being elected due to a lack of ideological conformity with the party (Thomsen 2017b).

Though changing operations in Congress may offer some further explanation to current trends, primaries remain the institution most frequently blamed for fostering disconnect between voters and members of Congress.

2.4.3 The Role of Primaries

Apportionment of blame to primary elections is, therefore, highly dependent on how elite polarization is understood in relation to mass polarization. In this ongoing debate, scholars who view the mass public as non-ideological argue that primaries incentivize non-centrist position-taking, causing a disconnect between the preferences of ordinary Americans and those on Capitol Hill. These scholars see primary elections as the main culprits for this disconnect, despite mixed empirical findings about the relative positions of primary and general election voters. The principal subject under investigation in this thesis is therefore whether and how primaries can contribute to the observed disconnect between the American public and those that represent them in Congress.

The theoretical argument that primaries polarize appears intuitive. Following the logic of Downs' (1957a, 1957b) median voter theorem in a unidimensional space of competition, Coleman (1971) and Aranson and Ordeshook (1972) apply the premise to two-stage elections, predicting that candidates will diverge. Because candidates must first appeal to a primary selectorate, whose median voter is to the left (right) of the general electorate in a Democratic (Republican) primary, nominees enter the general election campaign with non-median platforms. In these models, candidates align their position with the median voter among the primary selectorate to win the nomination, as to position too close to the general median would disincentivize partisan voters whose "expected gain would be near zero because their candidate if elected would be no closer to their own position than the opponent" (Coleman 1971, 36). Consequently, nominees will hold divergent platforms aligned with their relevant partisan primary median voters (Aldrich 1983).[45]

[45] An important note in these models is that they assume district competitiveness, for example, in Coleman's (1971) model, when this assumption is removed and the party has (almost) no chance of losing the general election, then the incentives for rational decision making by voters during the primary shift further away from the center. In other words, reduced electoral competition in the general election enhances the polarizing effect of primary elections.

The theoretical argument that primaries polarize therefore assumes that primary electorates diverge from their district's median voters. Given the low turnout in primary elections, this assumption seems reasonable.[46] Primary selectorates are also assumed to be non-centrist under May's special law of curvilinear disparity (May 1973), which posits that active members of a political party are more ideological than both party elites and other party voters. Though U.S. parties do not have the formal membership structure of their European counterparts, primary voters could be interpreted as analogous to members. Conceiving of primary voters as more ideologically extreme than general electorates and the public at-large is a longstanding idea—"primary participants are often by no means representative of the party" (Key 1956, 145)[47]—which has only become more prominent as Congress has polarized, "primary electorates are much more partisan and prone to ideological extremity, and the need to please them is one force behind party polarization in Congress" (Jacobson 2004, 16). Polarization in Congress is now blamed on the extremity of primary voters by scholars (Brady, Han, and Pope 2007; Burden 2001, 2004; Fiorina, Abrams, and Pope 2005; Fiorina and Levendusky 2006; Hacker and Pierson 2006; Barbara Sinclair 2006), media outlets (Kamarck 2014b; Kamarck, Podkul, and Zeppos 2016) and politicians alike (Keisling 2010; Schumer 2014). The dominant narrative of primary voters in academic sources and media outlets is of primary voters as rabid partisans who hold ideologically extreme positions.[48]

Though the logic of above arguments about primary voters appears intuitive, empirical support is mixed. Multiple studies of both presidential (Abramowitz 2008; Geer 1989; Norrander 1989; Ranney 1968) and congressional (Blunt 2000; Boatright 2013, 2014; DeCrescenzo 2020; Hill 2015; Hirano et al. 2010; Hirano and Snyder 2019; Porter 2021; Ranney 1968; Sides, Vavreck, and Tesler 2018) primary voters find little to no difference between the ideological preferences of primary and (non-primary voting) general election party voters. Sides et al. find that "primary voters were ideologically representative subsets of the broader party following" (2020, 8) regardless of the rules or dynamic of the competition. Norrander draws a similar conclusion, stating that "fears about extremist primary voters selecting extremist candidates unpalatable to the more moderate general election voters are unsupported. Primary voters just are not more ideologically extreme" (1989, 575). Geer finds that a party's presidential primary voters are not more ideological or partisan than general election voters

[46] Averaging 4.6% in 2006 and 7.5% in 2010 (Galston and Kamarck 2011).

[47] Methodologically, it is worth noting that this work is based on aggregate data, Key himself admits that sample surveys would have been a better data source.

[48] This framing extends beyond the U.S. to scholarship on Latin America, where primaries are said to "attract hardcore partisans, who tend to come from the ideological extremes" (Carey and Polga-Hecimovich 2006, 530).

who identified with or voted for that party (1989). Boatright's data also indicate that primary voters are no more ideologically polarized than the party's general electorate (2013).[49] Studies using validated turnout[50] to compare the primary electorate with a party's likely general election voters consistently find no ideological differences between the two groups, leading many scholars to conclude that congressional primary voters exert only minimal or no polarizing effect. Taken together, this scholarship makes a compelling case that primary voters are ideologically representative of voters for parties in whose primaries they participate. Summarizing the literature, Hirano and Snyder state, "as others have shown, those who vote in primaries are ideologically representative of party identifiers as a whole. In particular, primary election voters are not significantly more ideologically extreme than party identifiers" (2019, 5).

Though they may not be more ideologically extreme, primary and non-primary voters do differ in the degree to which they think in ideological terms, with higher rates of interest in politics and levels of education among the congressional primary electorate (Blunt 2000; Sides et al. 2020). Primary voters are more likely to have attended college than the general public, and are, on average, whiter, wealthier and older (Kamarck and Podkul 2018a). Consequently, primary voters may be more attuned to ideology, making positional considerations more important in primary rather than general elections (Burden 2001, 67). Such an expectation aligns with Converse's finding that politically engaged members of the public are more likely to have a "functioning belief system," with political participation and higher levels of education serving as indicators that a member of the public will conceive of politics in ideological terms (Converse 1964, 65). Congressional primary voters may therefore be more versed in ideological nuance than the general electorate, incentivizing candidates to align positionally with their primary selectorate.

Proponents of primaries as a cause of congressional polarization claim that low turnout makes them susceptible to extremists. Accordingly, these scholars argue that candidate extremism should be most acute in closed primaries, where turnout is most restricted (Ansolabehere, Snyder, and Stewart 2001; Burden 2004; Fiorina 1999; Goodliffe and Magleby 2001). Again, though the theorized relationship appears sound, the empirical evidence here is also mixed, with multiple studies finding no relationship between primary openness and

[49] Other recent studies use multi-level regression with poststratification (Porter 2021) or Bayesian approaches (DeCrescenzo 2020) to independently estimate the position of districts' partisan selectorates find similar conclusions.
[50] Jacobson (2012) indicates that primary electorates are more ideological using a measure of self-reported turnout, which Hirano et al. (2010) demonstrate is unreliable.

candidate extremism (Ahler, Citrin, and Lenz 2016; McGhee et al. 2014; Rogowski and Langella 2015; Kousser et al. 2015; Hassell 2018). In contrast, Gerber and Morton (1998) do find a link between primary openness and candidate extremism. The effects of reform efforts are similarly contested, with studies focusing on the implementation of California's non-partisan top-two primary drawing different conclusions. Alvarez and Sinclair (2015) find that moderates perform better when they are able to force a same-party run-off, Bullock and Clinton (2011) finding a moderating effect of California's top-two primary in safe districts only; whereas Ahler, Citrin, and Lenz (2016) find that the reform produced more, rather than less, polarized outcomes. Over-time trends of participation and candidate position are also not in the theorized direction; rates of moderates selected have declined as states have made voter eligibility more inclusive, casting further doubt on the portrayal of primary selectorates as ideologically extreme.

A further argument against this narrative is advocated by Owen and Grofman (2006), whose model includes a variable to capture concern for selecting a candidate with ideological fit with the general electorate. They advocate that, as partisan affiliates, primary voters have a significant preference in the general election outcome and so will consider candidates' electability in ideological terms during the primary. If voters act rationally, they will vote for the closest ideological candidate *who can win*, as there is zero gain from their party's candidate losing the general election. As a result, even if the primary electorate holds non-centrist positions, voters may nominate moderate candidates aligned with the general electorate on electability grounds. Though an in-depth analysis of spatial models of voting is beyond the scope of this thesis, the long history of skepticism about the ideological nature of voting behavior (Converse 1964; Kinder and Kalmoe 2017) appears notably absent from accounts that argue primary voters are to blame for partisan polarization in Congress. Even if primary voters hold positions further from the political center or exhibit greater issue constraint, the assumption that they would vote for candidates based solely on ideological proximity is, at best, undertheorized.

Winning a primary is, however, not only dependent on positional alignment with voters, where primaries may incentivize non-centrist candidates *even if* selectorates are not extreme (Chen and Yang 2002; Cooper and Munger 2000; Oak 2006). Primary donors have been shown to be more extreme than primary electorates (C. W. Brown, Powell, and Wilcox 1995; Hill and Huber 2017; Kujala 2019) and hold markedly distinct preferences and policy positions to non-donors (Gilens 2009). In short, "Democratic contributors are more liberal than

other Democrats and Republican contributors are more conservative than other Republicans" (Hill and Huber 2017, 10) and donate to positionally proximate candidates (Bonica 2014). Consequently, non-centrist position-taking aligns with an increased ability to raise funds in both primary and general elections (Ensley 2009; McCarty and Poole 1998). Gilens's (2005, 2012) research indicates that elites in Congress only respond to the most wealthy and influential members of the public, who disproportionately finance congressional campaigns.

Candidates must also engage enthusiastic activists who constitute their primary campaign on the ground. Like donors, these partisans are further from the political center than primary electorates (Hill and Huber 2017; Saunders and Abramowitz 2004). Activists form an integral part of a wider network (Bawn et al. 2012) and are a vital resource during the nomination process (Masket 2009). Interest groups can play a similar role, where candidates with interest group support have had increased success in congressional nominations in recent years (Manento 2019). Both activists and interest groups hold distinct positions on the issues they care about and seek assurances that candidates are positionally aligned during the nomination. Providing assurances to multiple groups can pull candidates away from the center in a process of "conflict extension" (Layman et al. 2010), and where primary candidates who receive more interest group support take positions further from the center (La Raja and Schaffner 2015; Manento 2019). The proliferation of partisan media may have further elevated non-centrist candidates through favorable coverage to an audience of party sympathizers (Heft et al. 2021).

The institution of primary elections may also produce polarized candidates by weakening the power of the party structures by removing one of their most important sources of influence over candidates, the power to select and de-select candidates for election (Jacobson 2004, 16). Debates concerning relative influence within the party date back over a century, Loeb finds that "the direct nomination system has not weakened the party organization nor lessened the influence of the professional politician" (1910, 171), but others argue that direct primaries introduced "disruptive forces that gradually fractionalized the party organization" (Key 1942, 342). Other scholarship contends that primaries changed the culture of political campaigning more generally, for example by fostering candidate-centered voting, as states that introduced mandatory primary laws saw increases in split-ticket voting in the first half of the twentieth century (Hirano and Snyder 2019, 53).[51]

[51] Reynolds (2006) suggests that causality runs in the other direction: ambitious candidates started actively seeking the nomination first, and the adoption of primaries merely formalized the behavior.

Finally, primaries may contribute to polarization because (potential) candidates may *believe* the dominant narrative of primary electorates as ideologically extreme. Understanding the nomination process as rewarding non-centrists may make potential moderate candidates more inclined not to run, or cause incumbents and new candidates to adjust their positions to appeal to a perceived extreme selectorate, regardless of whether the electorate is extreme or not. DeCrescenzo finds that primary voters do not support candidates who "best appease their appetites for ideological policy promises" (2020, 206), but that elites behave *as if* they do.

The above patterns may polarize candidates in one of two ways. Primaries may have a *selective effect*, where voters nominate comparatively extreme candidates (examined in this thesis in chapter seven); or an *adaptative effect*, where candidates' responses to other important groups during the nomination or their perceptions of their primary selectorate may induce more extreme position-taking, either between (chapter eight) or within (chapter nine) electoral cycles. Though I do not empirically test the positions of primary voters in this thesis, the comparison of findings from chapter seven with those in chapters eight and nine sheds further light on the extent to which the decisions of voters or candidates are important in the debate about primaries and positioning.

In sum, the empirical literature raises significant doubts about the dominant narrative of primary voters as a source of polarization but suggests several other ways that the institution of primary elections may help explain the positional disconnect between (even partisan) voters and candidates for Congress. This thesis therefore adds to the body of empirical research about the polarizing effect of primaries on candidate positioning.

2.5 Conclusion

This chapter first introduced the main components of the thesis necessary for the research design: party factions, ideology, candidate positioning and partisan polarization. In reviewing the literature on party factions and partisan polarization in Congress, I argue that a synergy between two distinct sub-sections of the literature exists, with partisan polarization connected to the outcomes of intra-party factional conflicts. As moderate groups such as Democratic Blue Dogs and Rockefeller Republicans have declined, the ranks of progressive Democrats on the left and reactionary Republicans on the right have swelled. The historical overview of primary competition dating back to the 1970s serves as a reference for the contemporary trends identified in chapter four. These trends were also used to justify my focus on the period from 2006 onwards.

Finally, this chapter considered the drivers of elite polarization in Congress, situating the claim that primaries polarize within the larger context of institutional disconnect between elites and voters. In doing so, I employ contributions of two contradictory bodies of literature, with scholarship arguing that the public have polarized used to identify the minimal positional differences between primary and non-primary voters, and work advocating that mass polarization is a 'myth' used to identify the impact of electoral institutions in terms of the continued positional divergence between candidates for Congress and (even primary voting) members of the public. Having laid the foundations for claims about primary elections and their connection with trends of partisan polarization in Congress, I now turn attention to the data constructed to answer my research questions.

3 Data, Sources, & Decision Rules

There are two kinds of parties just like there are two kinds of churches: those who seek out converts, and those who hunt down heretics.

Democratic strategist and political analyst Mark Shields[52]

I relied upon multiple sources to construct the original dataset used in this thesis to provide the most complete and representative picture of the nature and dynamics of primary competition as possible. Construction of this new dataset using digital sources was necessary to include candidates from all contemporary congressional primaries. This dataset includes a broader range of candidates than analyzed elsewhere, and more recent data than most other studies in the literature. The construction of a new dataset of congressional primary candidates is therefore one contribution of this thesis, providing granular understanding of the dynamics of competition in individual congressional primaries which can be aggregated to better understand temporal trends.[53]

This chapter introduces that dataset, providing information on the sources used and decision rules followed for the two key qualitatively coded variables about the dynamics of a given intra-party competition: leading candidates' proximity to factional ideal types (used to identify factional primaries) and the reason for each primary contests taking place (used to identify ideological primaries). Though these variables are rooted in the party and primary literature and align with media coverage about intra-party competition they provide new data and insight about the congressional nomination process. The factional primary variable is an original contribution to the literature and the ideological primary variable is an adaptation and extension of an established coding scheme (Boatright 2013).

In this chapter, I first introduce the dataset, including inclusion and exclusion criteria with specific justification of any decisions made which deviate from the established literature. Next, I introduce the sources used to create the dataset, first focusing on the construction of the two qualitatively coded variables discussed above, and then discussing the use of other established variables in this thesis. In all cases, I clarify sources' uses, strengths, and weaknesses. Having done so, I present the factional ideal types and the indicators used to code candidate proximity including caucus membership, group and individual endorsements, policy

[52] Quotation attributed by Democratic strategist Paul Begala (Begala 2022)
[53] This dataset also includes several other variables, such as primary candidate quality, which were hand-coded by the author and would be of substantive benefit to congressional scholars.

positions, and campaign themes. Finally, I similarly introduce the method used to assign the reason for primary contests taking place, noting how my approach has been modified from the existent literature to expand the dataset to include all primaries. I include the full codebook with explanations of how each variable was constructed at the end of this thesis.

3.1 Dataset

The dataset includes all House of Representatives and Senate primaries between 2006 and 2020 across forty-nine states, as Louisiana does not have congressional primaries.[54] For a nomination to be considered contested, at least two names were required on the ballot, following the established literature (see e.g., Ansolabehere et al. 2006).[55] A total of 7,402 potential nominations were included in the dataset, with candidates from 3,331[56] contested primaries analyzed.

In contested primaries, candidates[57] who finished in first or second place were assigned as proximate to a factional ideal type within their party using a minimum of two indicators.[58] The factional ideal types were constructed in line with both academic literature and media coverage about the intra-party dynamics of both parties throughout this period and are expanded upon below. Though many primaries feature many more than two candidates, information on minor candidates—who often receive exceedingly low amounts of the vote—is scarce. Indeed, information on some candidates finishing in second position in their party's primary was too scarce to position them. In other contests, particularly open contests in safe districts or states, it would have been possible to code many candidates in a primary, but only the two highest placing candidates were coded for consistency.[59] Primaries were then coded as

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[54] In the 'Louisiana Primary' all candidates run on a single ballot on the general election date. If no candidate receives fifty percent of the vote, a run-off election is held. Given that participation in these 'primary' elections is more reflective of general elections, these contests were deemed sufficiently different as to warrant exclusion. For the same reason, special elections for the Senate with this structure (e.g., Georgia 2020) were excluded.

[55] Under California and Washington's top-two system, a contest was considered a 'party-primary' when two candidates from the same party stood in a district. Other scholarship on congressional primaries (e.g., Thomsen 2021) divides top-two and blanket primaries along partisan lines in the same way.

[56] 1,434 Democratic House Primaries, 1,524 Republican House Primaries, 170 Democratic Senate Primaries, and 199 Republican Senate Primaries were analyzed. Further descriptive data including temporal trends are provided in the following chapter.

[57] Throughout the thesis, individuals running in primaries for one of the two major parties are referred to as candidates or primary candidates. Once primary candidates win the party nomination, I refer to them as either nominees, nominated candidates, or general election candidates. Nominees are candidates nominated for the major parties in general election, not all nominees earn this status through primary elections, but (almost) all winners of primary elections are nominees.

[58] For most candidates considerably more than two indicators were used, the full list of indicators is shown in Table 3.3. Where two data points were not found, candidates were not coded as aligned to a faction.

[59] Though some primary contests feature two leading candidates and then a range of longshot candidates, many other races (especially in open seats) feature three or more viable candidates with a realistic chance of winning the nomination. In addition, to properly control for candidate viability, the *ex-post* results are likely insufficient as this control relates to realized rather than expected performance. For a comprehensive inclusion of candidates who perceived they had a realistic chance of winning the nomination, it would therefore be necessary to select on pre-primary traits. In general elections, polling results could be used as an indicator for realistic expectations but polling data for primaries is rare and notoriously difficult, with wide confidence intervals

factional when the nomination contest took place between candidates who received support from different factions. Full details of the factional ideal types and indicators used for candidate identification are provided in section 3.3 below.[60]

Independently, I assigned reasons for primary contests taking place using Boatright's (2013) reason for contest variable based on candidates' statements on their website or in local press coverage. Previously, this approach had only been applied to incumbent primaries using non-digital sources, with some minor methodological adaptations I was also able to include open and challenger primaries. Assigning reasons for primary contests taking place enabled me to code primaries as ideological when leading candidates framed their candidacy in terms of ideological difference from their same-party opponent(s). The full explanation of the approach, including the reasons for primary contests, is presented in section 3.4 below.

For both variables, decisions made about data inclusion followed the extant literature and established conventions for studying primary elections wherever possible (in particular Boatright 2013, 2014). These decisions include the choice to exclude primary elections which were held but where only one candidate appeared on the ballot,[61] or where primaries resulted in subsequent runoffs, "I consider the primary that preceded the runoff, not the runoff itself" (Boatright 2013, 72). I also apply the same vote share calculations to states holding top-two primaries that Boatright applies to blanket and jungle primaries, namely, "I divide the incumbent's vote share by the percentage of the vote received by the incumbent and any other same-party candidate" (2013, 72). For Nevada ballots featuring a none of the above option, I excluded these votes from percentage totals.[62] One deviation from Boatright's approach is that he includes data from party conventions, whereas I code these districts as not having held contests, though I note where conventions were used. I consider party conventions as a structurally different nomination process to a primary election, with reduced ballot access and limited opportunity for members of the public to participate.

The aim of combining data sources is to provide as complete an account of primary competitions between 2006 and 2020 as possible. The original variables constructed in this dataset were all qualitatively hand-coded, except for the Twitter text positions used in chapter

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due to voters' greater likelihood to switch to an alternative same-party candidate. Hence the decision to restrict inclusion to the two highest placing candidates per contest.

[60] A total of 137 candidates across the dataset had recently been a member of the opposing party, were running on a platform more commonly associated with the alternative party, or were specifically running for tactical reasons—i.e., to disrupt or disadvantage that party in the general election—and were therefore coded as centrist and not considered as aligned to either party faction.

[61] "There is no salient difference between districts where one candidate ran and districts where there was no primary. This effectively creates a category for primaries where there was no competition" (Boatright 2014, 118).

[62] Again following Boatright (2013).

nine.[63] Manual coding of these sources has several advantages, particularly when interpreting candidates' motivations and ideological identification. In specific application to primaries and their relationship with polarization, Kamarck and Wallner (2018) comment on the need for more qualitative research regarding the motivations and concerns of candidates and members of Congress. Given the potential complications of qualitatively interpretating candidate motivations and position using multiple sources, all coding was personally conducted by the author during the first year of this project, starting in summer 2019 and completed at the conclusion of the 2020 primary season in September of that year.[64]

Unlike some other studies of primary elections, I do not restrict the inclusion of contests in my main analyses via the use of thresholds but include thresholded results in the chapter appendices. In Boatright's (2013) study on incumbent primaries, he only includes challengers who receive more than twenty-five percent of the vote, and in his book on congressional primaries (2014) he sets a threshold of five percent of the primary vote to be included. Boatright positions these thresholds as generous, to "err on the side of being too inclusive in measuring serious campaigns rather than excluding some legitimate challenges" (2013, 69). I initially prioritize the inclusion of all competitions, leading to more primaries being recorded in states such as Indiana and Maryland which have fewer restrictions on ballot access.[65] All analyses are then repeated using the two most common vote thresholds in the literature: an above five percent candidate threshold (Boatright 2014) and a below seventy-five percent winners threshold (Jewitt and Treul 2018). In addition, I perform my analyses with a threshold based on challengers' reported campaign receipts, as noted on their 12P Pre-Primary FEC report (see also Thomsen 2021). These thresholds produce only minimal differences in trends observed beyond a slightly lower number of contests recorded.[66]

There may also be normatively beneficial reasons to include all contests, if—as Boatright argues—recent perceptions about primary competition have been skewed by an unrepresentative subset of contests, where "literature on primary elections often takes its cue from particularly notorious primary challenges" (Boatright 2013, 173), then broadening the inclusion of contests seems an appropriate mitigation of this problem. At worst, there appears minimal harm in being overly inclusive, especially when analyses are repeated using thresholds.

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[63] These data are introduced separately in the chapter's method section.

[64] An initial version of the 2014 and 2018 data were coded as part of my MA thesis in summer 2018 (Cowburn 2018), these years were recoded for this project.

[65] Given that the focus of this thesis is not on variation between states, this poses minimal challenges for the stated research questions.

[66] The five percent candidate threshold excludes only fifty-five primaries across the dataset.

Finally, there seems no reason to not pay attention to unwinnable districts given Boatright's claim that "there is symbolic value in winning the nomination even in hopeless districts" (2014, 93). Accordingly, I include data for primaries in all districts with more than one candidate listed on the ballot, regardless of vote share or district competitiveness in the general election.

3.2 Sources

This section introduces the sources used to code candidates' factional proximity and identify the reasons for primary contests taking place. An overview of sources including uses, strengths and weaknesses is provided in Table 3.1. As discussed above, these sources are used to code candidates' proximity to one of four factional ideal types, outlined in the following section (3.3) and to determine the reason for primary contests taking place (3.4). These qualitative schemas enable the classification of primaries as ideological and factional, which are used as the key treatment variables in later quantitative chapters. This section also introduces other important variables whose use is established within the literature, which serve as control or outcome variables in these empirical models.

3.2.1 Factional Proximity & Reason for Contest Variables

Multiple difference sources were used to qualitatively assign candidates' proximity to a factional ideal type and the reason for primary contests taking place. These measures were all hand-coded by the author to ensure consistency across the dataset. Where sources indicate different support or reasons, prioritization was given to the most prominent or clearly associated factions and narratives, respectively. A full list of sources used is provided in Table 3.1, with each data point introduced below.

Membership of an ideological caucus was used as an indicator of factional proximity among members of Congress. These groups sit together on Capitol Hill with a common ideological orientation,[67] meaning this metric is only available for candidates who have spent time in Congress and provides an indication of ideological self-placement within the congressional party. Caucuses exist outside the control of party leadership, meaning they are often the site of factional organization (Bloch Rubin 2017). Ideological caucus membership is commonly used in scholarship on factionalism to identify sub-party affiliation (e.g., Blum 2020).

[67] Non-ideological caucuses or working groups were not included (e.g., Congressional Black Caucus).

Table 3.1 Data Sources

Data	Use	Strengths	Weaknesses
Caucus memberships	Data point to code factional proximity	Clear indication of ideological position in the party	Only available for incumbents
Endorsements/ associations (groups)	Data point to code factional proximity	In line with existing literature showing endorsements matter	Relative paucity of endorsements, also include candidate affiliations to overcome this: not sanctioned by associated group
Endorsements/ associations (people)	Data point to code factional proximity	In line with existing literature showing endorsements matter	Relative paucity of endorsements, also include candidate affiliations to overcome this: not sanctioned by associated individual
Policy positions & campaign themes on candidate websites	Data point to code factional proximity & reason for contest	Public facing proclamations by candidates	Potential for strategic position taking
Ideological self/opponent identification on campaign websites or in interviews	Data point to code factional proximity & reason for contest	Public facing statements by candidates	Potential for strategic position taking
Candidate explanations of reasons for running	Data point to code reason for contest	In line with existing literature (Boatright)	Self-ascribed reasons from candidates

Endorsements by, or associations with, prominent groups and people were used to indicate proximity to a faction, these associations were often made in explicitly ideological terms, with candidates often using these people as reference points of the type of Republican or Democrat they would be in Congress. Endorsements have been used as a key component in important academic works (Cohen et al. 2008) and are now tracked by media sources such as *FiveThirtyEight* to measure support within the party (Bycoffe and Dottle 2019). Endorsements are especially valuable in intra-party contests where—absent party labels—an endorsement may be the most visible cue voters have about a candidate. Multiple studies find a positive causal effect of party endorsements on the performance of candidates in primaries (M. Cohen et al. 2008; Dominguez 2011; Hirano and Snyder 2019; Kousser et al. 2015; Steger 2007) and other research uses endorsements to draw conclusions about intra-party dynamics (Kamarck and Podkul 2018b; Manento and Testa 2021). Presidential endorsements are primarily made on ideological grounds (L. R. Johnson, McCray, and Ragusa 2018, 3; see also M. Cohen et al. 2008; Steger 2007), with Kousser et al. (2015) identifying similar dynamics in congressional districts. Other studies (Hall and Snyder 2015; Karpowitz et al. 2011) use endorsements to scale congressional candidates ideologically, indicating the validity of their use here.

Affiliations with groups supporting candidates based on ideological position were used, in line with other research that uses interest group alignment to determine factional allegiance (Bendix and Mackay 2017). The organizations included endorsed candidates who held policy views aligned to a faction. These groups attempted to provide shared resources and funds to candidates from structures outside of formal party institutions, and often used distinct branding to identify endorsed candidates aligned with the faction. These group endorsements

were designed to help primary voters identify these candidates as holding certain positions or prioritizing specific issues within their party's wide tent.

Endorsements from, or direct associations with, certain prominent individuals within the party were considered as a further identifier of factional proximity. Prominent people within each faction were identified based on a combination of fit and frequency with which they were referenced. Individuals used were commonly cited within the media as leaders of or clearly aligned to a party faction. At the same time a variety of people were chosen to cover the ideological breadth of a faction, including different sub-groups where applicable.[68] Endorsements or associations with individuals who were at separate times viewed as proximate to different ideal types were not considered for either faction (most prominently Obama).

Candidates' proximity to or support from a faction and reasons for primary contests taking place were both also assigned using content from campaign websites.[69] Campaign websites have been shown to be a good indicator of candidate preferences (Druckman, Kifer, and Parkin 2010), and were used to code candidates' policy positions and campaign themes. A similar system is used by Hirano and Snyder (2019, 270). In addition, local news reports and interviews with candidates were used to determine how candidates positioned themselves against their intra-party opponent(s), particularly in perceiving ideological differences and positioning themselves as the more liberal, centrist, or conservative candidate in the race. Media commentary—such as opinion pieces, editorials, or statements of endorsement—were not used in the coding process, with only direct quotations from candidates used. Hirano et al. (2015) adopt a similar approach to media sources, using an automated newspaper reading process to quantify candidates' relative ideological positions.

Campaign platforms serve as credible signals about issues that legislators pursue once in office (Rogowski and Langella 2015; Sulkin 2009, 2011). Campaign platforms may not reflect candidates' personal preferences, where candidates may strategically adopt policies that are perceived as popular to improve their chances of winning election. There may also be practical reasons for candidates being unable to pursue their campaign policy goals once in office, or minimal incentives to adhere to commitments made (Alesina 1988), phenomena that are shown to weaken the congruence between campaign platforms and legislative activity (Tausanovitch and Warshaw 2017b). The goal here is not to use campaign positions to predict roll-call voting

[68] e.g., Ron Paul and Ted Cruz in the Reactionary Republican faction to represent libertarians and social conservatives.
[69] Where websites were no longer active, I collected these pages using the Internet Archive "Wayback Machine"; https://web.archive.org/

behavior, but to use the positions advocated by candidates during their campaigns to assign proximity to a factional ideal type and understand why the candidate is running for Congress.[70]

3.2.2 Other Established Variables

In addition to the qualitatively constructed factional proximity and reason for contest variables, several established measures are included in the dataset and used throughout this thesis. These variables commonly serve as outcome or control variables in the empirical models and are summarized with uses, strengths, and weaknesses in Table 3.2.

Table 3.2 Established Variables

Data	Use	Strengths	Weaknesses
NOMINATE scores (Lewis et al. 2021; Poole and Rosenthal 1985)	DV for Ch7	Standard measure of legislator ideology	Only available for incumbents, no variation between congresses, may be other influences on voting record (party, constituents), better at measure variation between rather than within parties.
One-Congress-at-a-time-NOMINATE (Lewis et al. 2021; Nokken and Poole 2004)	DV for Ch6 and Ch8	Same method as NOMINATE, allows variation between congresses	Fewer data points than NOMINATE so potentially less accurate, may be other influences on voting record.
CFscores (Bonica 2014)	DV for Ch7	Available for most candidates	Are a proxy for ideology, not a measure of candidate behavior, no variation within election cycle, nominees may attract new donor base once enter the general election phase. No 2020 data.
PVI (Cook Political Report 2017)	Control variable	Well established in the literature, easy to interpret	Some criticism based on conflation of presidential results and generic ballot (Kernell 2009).
VAP (U.S. Census Bureau 2021)	Control variable	Standard measure for primary turnout in the literature, not susceptible to variation in eligibility between states	-
District White % (U.S. Census Bureau 2021)	Control variable, propensity score estimation Ch6	-	-
District median income (U.S. Census Bureau 2021)	Control variable, propensity score estimation Ch6	-	-
Fractionalization	Control variable, proxy for incumbent threat Ch7	Standard measure of primary competitiveness	-
Campaign Finance Data (12P FEC)	Control variable	Most accurate and commonly used measure of primary finance	Candidates may raise or spend money during the primary to benefit them in the general. Do not include candidates who raise <$5,000

The most common measure of positional scaling are ideal point estimates based on roll-call voting behavior. First developed by Poole and Rosenthal (1985), first-dimension Dynamic Weighted Nominal Three-step Estimate (DW-NOMINATE) scores provide ideal points based on similar voting preferences among legislators as a quantitative proxy for ideology and

[70] The full list of positions and themes used to assign factional proximity is provided in Table 3.3 below.

remains the benchmark for assessing positions in Congress. DW-NOMINATE is not a measurement of candidate ideology but a proxy for ideology as it does not measure the personal preferences of politicians but captures the *behavior* of political actors. Roll-call voting is not rooted solely in legislator preferences; partisan and constituent pressures also exert influence. As Noel notes, NOMINATE scores, “are measures of everything from party pressure and loyalty to constituent interests to ideology” (2013, 187). Accordingly, the scale is unable to distinguish between ‘personal’ and ‘operative’ preferences (Rohde 1991), since legislators have diverse goals when casting votes, including re-election, the pursuit of good public policy, and internal influence in Congress (Fenno 1973).

The main limitation of applying NOMINATE scores to these data is the requirement for candidates to have served in Congress. Most candidates in these data never advance to Congress, meaning alternative measures are required. An additional weakness in application to these research questions is that scores remain static, meaning they are not able to provide information about changes in ideological position, particularly necessary when investigating the adaptative effect of primaries during the course of a single election cycle. Qualitative examples also demonstrate that NOMINATE scores may be lacking in some areas: Lee (2009) highlights the non-ideological nature of many votes using the example of Obama and Clinton from 2008 to show that a single vote resulted in different scores. An additional problem of NOMINATE is the inability to determine the direction of dissent among majority-party members, resulting in the placement of several notable progressives, including Alexandria Ocasio-Cortez and Ilhan Omar, as relative moderates within the Democratic Party. As a result, the measure’s architects and other scholars have noted its superiority at measuring distance *between* rather than ideological composition *within* each of the two parties (Bendix and Mackay 2017; Noel 2013; Poole and Rosenthal 2006).

To resolve the problem of static data at the individual level, first-dimension Nokken-Poole DW-NOMINATE (Nokken and Poole 2004) scores are used. These scores use the same approach as NOMINATE but are aggregated to each congress, enabling variation over time. Incorporating this measure enables us to track shifts in legislator voting behavior, particularly important in assessing polarization due to incumbent adaptation between congresses. Restricting assessment to a single congress means fewer votes are used to position legislators, making these scores less precise than traditional NOMINATE scores. The measure also shares the other weaknesses of NOMINATE scores.

Bonica's (2016) common-space campaign finance scores (CFscore)[71] use a similar method to NOMINATE to estimate ideal points based on candidates' networks of donors who give more than $200. These data are commonly used to study primary elections, as they provide a means to position winning and losing candidates on a single continuum (Ahler, Citrin, and Lenz 2016; Bonica 2014; DeCrescenzo 2020; Rogowski and Langella 2015; Thomsen 2014, 2017c). The data are available for candidates who raise $5,000, requiring them to file with the Federal Election Commission (FEC), meaning they exist for most candidates, including those who do not advance to Congress. CFscores assume individual donors attempt to maximize their utility by donating to ideologically proximate candidates in a "spatial model of giving" (Bonica 2014, 3) to fund candidates with similar positions. Further research indicates that candidate ideology has a causal effect on CFscores (DeCrescenzo 2020, 196). CFscores are highly correlated (0.97) with NOMINATE where available and provide independent validity for roll-call measures.[72] The main benefit of CFscores when compared with NOMINATE for this work is the greater applicability to primary candidates: candidates without CFscores composed less than twenty percent of primary winners.[73] As a result, CFscores are the most established method of scaling candidates that do not advance to Congress.

Despite their established position in the literature, CFscores are not without problems or detractors. The utility of CFscores as a measure of intra-party ideology is contested by some scholars. Tausanovitch and Warshaw (2017b) show that CFscore is almost no improvement on party identification for predicting roll-call voting and is a poor predictor of moderate and extreme voting records (also see Hill and Huber 2017), though Bonica shows that the scores are more accurate than party-only donation models (2014). Importantly, CFscores are not used here to make predictions about roll-call voting behavior and both measures are included independently. Tausanovitch and Warshaw further demonstrate that using CFscores overestimates polarization, arguing that the measure captures domain-specific factors rather than candidates' ideology (2017b, 167). In addition, CFscores for the 2020 election cycle are yet to be published at the time of writing.

In application to primary election positions, a further weakness of CFscores is present due to the two-stage nature of the election cycle. Because CFscores are given as a single score across a primary and general election, winning and losing primary candidates are scaled across

[71] CFscores are alternatively known as DIME scores, as they are found in Bonica's Database on Ideology, and Money in Politics, and Elections (DIME). CFscores are also proxies for candidate ideology and capture the preferences of donors.
[72] As Bonica himself suggests, "the two measures should be viewed as complementary. One is a measure of ideological voting while the other is a measure of ideological giving." (2014, 372).
[73] Of the 6,662 candidates I manually coded, 2,071 did not have CFscores.

different periods with potential implications. For example, a nominee's CFscore may moderate—or become more extreme—following the primary, once former supporters of their intra-party opponent now donate to them out of opposition to the alternative party. CFscores are aggregated across an entire electoral cycle, meaning they are unable to capture the within-election adaptative effect of primaries. I return to the necessity of dynamic data in chapter nine in justifying the need to use positions derived from candidate communication.

Whereas roll-call votes may not reflect personal preferences, CFscores may fail to give accurate information about ideology when donations are non-ideological. Brown, Powell and Wilcox (1995) show that donations are often given because people are asked to contribute by friends. Other studies highlight the importance of perceived material benefits (Francia et al. 2003) and social reasons (Betsy Sinclair 2012) in motivating donors. Despite these concerns, alternative studies do show a high degree of ideological giving (La Raja and Wiltse 2012, 519) and Bonica (2014) provide further evidence that non-ideological factors align with ideology. Put simply, CFscores may fail to accurately capture candidates' preferences because they are a measure of the identity of donors, meaning candidates have no discretion about positions.

I use the established method of district identity, *The Cook Political Report*'s Partisan Voter Index (PVI) (Cook Political Report 2017) as a control for district or state partisanship. The scale gives districts a score of R+n or D+n, with the figures indicating how much toward a party a district or state leans compared to the nation based on two-party presidential vote share in the last two elections. Presidential vote share has long been used as a measure of district identity (Ansolabehere, Snyder, and Stewart 2001; Canes-Wrone, Brady, and Cogan 2002; Downs 1957a, 1957b; Erikson and Wright 2000).[74] To serve as a control variable showing partisanship relative to the party primary, PVI figures are rescaled into a + or − figure. For example, an R+2 district would be a +2 district for the Republican primary and –2 for the Democratic primary; I label this rescaled measure *Relative PVI*.

To measure primary turnout, both raw figures and turnout as a proportion of the voting age population (VAP) are used. VAP has become the standard measure for primary turnout in the literature (e.g., Hirano et al. 2010, 178). It is preferable to the alternative voting eligible population (VEP) as it is not susceptible to variation in eligibility between states, meaning it is more consistent over time, though, of course, rule changes still affect figures. VAP is also normatively preferrable as it includes all citizens and serves to highlight where

[74] Kernell (2009) is critical of the practice of using presidential vote share to measure district preferences, arguing instead for an alternative method which includes measures for district heterogeneity and variation in the distribution of preferences between districts. PVI is used here for simplicity and as the standard measure of district identity.

participation rules are particularly restrictive among certain groups such as former felons. All figures are based on the relevant data fields in the American Community Survey (ACS) in the census (U.S. Census Bureau 2021). In many of the empirical models throughout the thesis, I control for district whiteness, as a percentage of voters in a district who are White, as shown in the ACS. I use an economic control of districts' median income, again taken from the ACS. These two controls are also used to estimate propensity scores in chapter six, with more details provided in that chapter.

Fractionalization is used as a measure of primary competitiveness. The fractionalization index is calculated using the below specification and provides a number between zero and one to denote how divided the primary vote is between the candidates. A race where one candidate receives most of the votes is not very fractionalized and so scores closer to zero, with higher values denoting greater competition. The index is long established (Boatright, Moscardelli, and Vickery 2017; Canon 1978; Herrnson and Gimpel 1995) and accurately captures differences in races between multiple candidates. Where F is the fractionalization index, C_1 is the percentage of the vote received by the winning candidate, C_2 the second candidate, C_3 the third candidate, and continuing for all candidates in the election. The scores were personally calculated using the electoral returns from the FEC website, this variable is used as a control variable in several models, and as the outcome variable as a proxy for incumbent threat in one model in chapter seven.

$$F = 1 - \ \Sigma[(C_1)^2 + (C_2)^2 + (C_3)^2 + (C_3)^2 + (C_4)^2 \dots]$$

Campaign finance data were obtained directly from the Federal Election Commission (FEC) website. As in general elections (Jacobson 1978), fundraising is a vital determinant of candidates success in congressional primaries. In Thomsen's (2021) dataset of primaries between 1980 and 2020, sixty-nine percent of non-incumbents who raised the most money in contested primaries became the nominees. I follow her approach to data collection, using the amount raised in the entire preprimary period and declared in the 12P preprimary report. Candidates who raise at least $5,000 are required to file a fundraising report. Though some candidates likely use money raised during the primary for the general election, this is the most established and consistent method of assessing primary campaign contributions. This variable serves as a further control in several empirical models.

3.3 Candidates & Factions in Primaries

Intra-party factions were operationalized as ideal types, with congressional primary candidates assigned ideological proximity to these types. In line with literature on the subject, which contends that the major parties have contained two ideological factions since the nation's founding (Reiter 1981, 2004; Sin 2017, 14), I use a bi-factional model for each party. Media sources commonly frame each party as having two wings, or lanes, most commonly when discussing presidential nomination contests, meaning this understanding of intra-party division is now embedded in popular understanding of the parties. The ideal types are labeled (from left to right): *Progressive Democrats*, *Establishment Democrats*, *Establishment Republicans*, and *Reactionary Republicans.* These labels are rooted in the historical trends of intra-party factions, detailed in section 2.2, and provide meaning to the intra-party dynamics that exist within the two major parties. Candidates were coded as proximate to one of four factions using the data sources shown in Table 3.1 and described in detail below. Contests were then coded as *factional primaries* when leading candidates received support from different factions.

Following Reiter's (1981, 2004) bi-factional party structure, these factions align with his view of parties as having *regulars*, corresponding to the establishment factions, and *realigners* as the more polarized factions.[75] DiSalvo argues that the *regulars* or establishment factions are status quo factions, who are "usually insiders that tend to differentiate themselves on pragmatic or strategic grounds" (2012, 11), a dynamic that is reflected in the decision rule used here. Noel (2016) concurs, labeling the factions as *regulars* and *ideologues* and noting their distinction both in terms of policy preferences and approaches to politics more broadly.

Candidates proximate to the faction on the left of the Democratic Party are labeled as *progressive Democrats* due to an open embrace of the term progressive and clear placement as the faction furthest on the left of the ideological continuum.[76] The party's more moderate faction are termed *establishment Democrats* as a marker of position alone and without attributing value denoting experience or longevity in office.[77] This group comprised the dominant or established faction of the Democratic Party by the period of study, as explained in historical context in section 2.2. The comparatively moderate faction of the Republican Party is termed *establishment Republican*, again without referring to qualities beyond position,

[75] Reiter also identifies a smaller third category which he terms *misfits*, who align with the 'centrist' candidates discussed above.

[76] I use the progressive label to denote candidates in the leftmost faction and the term liberal to refer to the left end of the ideological continuum. Research indicates no meaningful difference between the terms in terms of policy or voting preferences among the public (Banda et al. 2016).

[77] The word *establishment* is used solely to ascribe ideological moderation or party orthodoxy when compared to the alternative faction. That is not to imply that these candidates are longer serving, more established, or beholden to specific interests.

but to note that this has been the faction of established or traditional conservative beliefs. Finally, the term *reactionary Republican* was taken from established literature on the faction to the right of the modern Republican Party.[78] Labeling of these factional ideal types is done without the intention of ascribing normative qualities. Intra-party labels are primarily used to refer to congressional primary candidates, though empirical studies reveal similar cleavages among the electorate (Hawkins et al. 2018; Pew Research Center 2014, 2017), and on occasion there may be references in this thesis to a faction's voters, activists, or affiliated groups.

Factional proximity has been coded using the indicators in Table 3.3 below and the sources in Table 3.1. Though many of the intra-party narratives and divisions focus on questions of race and gender, candidates' demographics do not form any explicit part of the characterizations or identifications of any faction. It is necessary to note here that voters perceive women and candidates from historically or systematically marginalized groups as more liberal (Fulton and Gershon 2018; Kitchens and Swers 2016; Koch 2000), and, though I do not claim to be above such biases as a researcher, qualitative coding of factional allegiance has been conducted using the specified data sources and indicators.

Stylistic differences between factions exist, particularly in terms of tone and the use of outsider or anti-establishment rhetoric. Given that one source of data is campaign material, it is likely that tactical positioning may have influenced categorizations in some cases. In the case of losing candidates, it is virtually impossible to determine whether policy preferences advocated during the primary would have been adhered to in office or were aired due to their perceived strategic value.

The ideal types presented are consistent with both the academic literature and media representations of factions, lanes, or wings within the parties. Multiple studies have followed similar approaches, attempting to code the proximity of representatives, organizations, or donors to either the regular or establishment, or the realigner party factions (Blum 2020; Boatright, Malbin, and Glavin 2016; Masket 2020; Noel 2016).[79] I apply the same logic to

[78] Gervais and Morris's (2018) work, *Reactionary Republicanism: How the Tea Party in the House Paved the Way for Trump's Victory*, foregrounds the term, and Blum (2020) uses the term "reactionary conservatives" to reference the perceived nature of the faction, particularly in terms of racial and cultural backlash. Similarly, Parker and Barreto's *Change They Can't Believe In: The Tea Party and Reactionary Politics in America* (2013) positions this faction as being deeply connected to the reemergence of a reactionary movement. Use of the term reactionary to describe the rightmost end of the Republican Party is not new, with the party's 1944 presidential nominee Thomas Dewey railing against critics of the U.S. party structure, including the authors of the 1950 APSA report, for desiring that "the Republican Party would be the conservative-to-reactionary party" (Dewey 1955).

[79] In a particularly detailed analysis for *FiveThirtyEight*, Bacon presents six 'wings' of the modern Democratic Party; with two on the left, two in the center and two to the right (2019b).[79] The factions here largely align, grouping the two left blocks to form the progressive faction, away from the center and moderate factions which form the establishment Democrats. Similarly, his analysis of the Republican Party has five 'wings' (2019a), of which two correspond to my more centrist faction and three to the right leaning faction.

candidates in congressional primaries. As noted elsewhere, such "categories are broad and imperfect" (Bacon 2019b), particularly as this thesis documents cleavages across a fifteen-year period. It is noteworthy that media outlets have become more attuned to intra-party differences in the past decade, though such analyses remain most frequently applied to candidates in presidential nomination contests.

Though factions have been present within U.S. political parties throughout history,[80] current intra-party divisions are unusual in that they are almost entirely nationalized. Historically, cleavages within parties tended to be regionally aligned, and though some areas remain more liberal or conservative than others, regional differences have declined (Levendusky 2009, 136).[81] Localized interests and personal characteristics of individual candidates are now less important to voters (D. J. Hopkins 2018), as party labels in general elections—and, as argued in subsequent chapters, factional orientations in primary contests—have become the dominant feature of political competition in a polarized era (D. A. Hopkins 2017, 25). Electoral choices have nationalized, with the same assessment criteria now used by voters across the country in general elections, and, as this thesis contends, in congressional primaries too. Political behavior has also nationalized, with voters engaging with national issues at the expense of local politics (D. J. Hopkins 2018, chap. 3). Though research on nationalization has focused on general elections, that even local politics is now concerned with national issues also affects primaries. As party identifiers have nationalized, so too have intra-party factions, the effect of this change is considered further in chapter five.

The following sub-sections outline the identification process for assigning candidate proximity to each of the four factional ideal types, introduced from left to right along the ideological continuum. Many of these references link directly back to the historical evolution of factions identified in the previous chapter. In terms of coding, when information about candidates pushed in different directions, decisions were made based on the number and prominence of data points available.

[80] For a comprehensive discussion of party factions in U.S. history see Sin (2017, 30–36). For an overview of factions from a political theory perspective see Sartori (1976, 3–29).

[81] McCarty, Poole and Rosenthal use the example of the Democratic Party in the twentieth century; "intra-party regional differences, such as those between northern and southern Democrats, have abated" (2006, 24).

Table 3.3 Indicators of Factional Proximity

Progressive Democrats	Establishment Democrats	Establishment Republicans	Reactionary Republicans
Caucus Membership			
Congressional Progressive Caucus	New Democrat Coalition	Main Street Partnership Caucus	Freedom Caucus
Medicare for All Caucus	Blue Dog Caucus	Tuesday Group	Liberty Caucus
Blue Collar Caucus	Moderate Dems Working Group		Tea Party Caucus
Endorsements, Associations & Funding (Groups)			
Democracy for America	Blue Dog PAC	Chamber of Commerce groups	Americans for Prosperity
OurRevolution	NewDemPAC	Main Street Partnership (PAC)	Club for Growth
Justice Democrats	Democratic Leadership Council		Tea Party Groups
Progressive Change Campaign Committee	Third Way		FreedomWorks
Brand New Congress	New Democrat Network		House Freedom Fund
Progressive Democrats of America			
Endorsements & Associations (People)			
Bernie Sanders	Bill Clinton	Ronald Reagan	Donald Trump
Howard Dean	Dianne Feinstein	Mitt Romney	Ron Paul
Elizabeth Warren	Joe Biden	John McCain	Ted Cruz
Alexandria Ocasio-Cortez	Joe Lieberman	Susan Collins	Mark Meadows
Barbara Lee	Al Gore	John Kasich	Michele Bachman
Ro Khanna	Amy Klobuchar	Dick Cheney	Sarah Palin
Policy Positions & Campaign Themes			
Free College for All	Increase minimum wage with inflation	Limit government using existing structures	Flat Taxation
Medicare for All	Tax reduction	"Pragmatic conservatism"	Leave the UN
$15 Federal Minimum Wage	ACA as healthcare reform	"Practical" solutions to illegal immigration	Zero percent foreign aid
Abolish ICE	End gridlock	End gridlock	Status threat narratives
Healthcare/education as a right	Bipartisanship	Bipartisanship	No amnesty for any undocumented immigrants
No corporate PAC donations	Work across the aisle	Work across the aisle	Climate change denial
Critical of the richest 1%/ billionaires	Problem-solver	Problem-solver	Construction of a wall at the southern border
Evoking European social democracies, esp. Scandinavia	Work within current systems to make healthcare more affordable	Commitment to internationalist foreign policy	Eliminating entire govt departs (esp. Dept for Education and EPA)
Electoral reform: advocacy of structural change to the Democratic Party and democratic system	Promotion of growth narrative	Invoking JFK, frequent quotation "Let us not seek the Republican answer or the Democratic answer but the right answer"	Whites as discriminated against, explicit narratives of white nationalism
Business regulation to ensure benefits of economic growth received by all	Incremental additions to healthcare cover	Not mentioning or associating their campaign with Donald Trump	Framing cultural issues as threats to (white) American identity
End the death penalty	Critical of ideological battles	Pro-business, economic growth	America First
End war on drugs, legalization	Minimal regulation of business	Free market economics, critical of tariffs	Open embrace of Donald Trump
Prioritization of climate change & renewable energy, Green New Deal	Concern about leftward movement of the party	Invoking party as anti-slavery, referencing Abraham Lincoln	Rhetoric about immigrants bringing drugs and crime into America
Obama presidency as not progressive enough	Support free trade, especially TPP	Support for UN as part of American military might	Positioning establishment opponents as RINO

3.3.1 Progressive Democrats

Having emerged out of anti-Vietnam War and civil rights movements in the 1960s, progressive Democrats remained a network of left-leaning groups in the twenty-first century. Groups and candidates aligned with this faction were often funded by participatory systems with wide

networks of relatively small donors. During the period of study, the faction became more organized on Capitol Hill, with more members of Congress in the Congressional Progressive Caucus, and the creation of the Blue-Collar Caucus and the Medicare for All Caucus. Membership of these groups was taken as a signal of candidates' proximity to this faction.

The creation of Howard Dean's Democracy for America following his failed 2004 presidential bid helped spawn further organizations with the aim of nominating and electing progressive candidates, including OurRevolution, Brand New Congress, Justice Democrats, and the Progressive Change Campaign Committee. Disaffection with income and wealth inequality was visible in the 2000 anti-globalization protests in Seattle and the Occupy movement, both of whom operated in this faction's network. Wars in Afghanistan and especially Iraq in the 2000s breathed new life into peace movements also aligned with this faction. Some candidates aligned with this faction had links to environmental movements, socialist groups, or other leftist organizations.

Many of the faction's aspirational figures were recent, stemming from a belief that politics-as-usual had failed and more radical alternatives are required in response to societal threats such as climate change, systemic racism, and unsustainable economic inequality. Candidates commonly identified with figures such as Howard Dean, Bernie Sanders, Elizabeth Warren, and Alexandria Ocasio-Cortez. Many of these people campaigned for other candidates in their primaries, for example branding them as Warren Democrats, as a signal of intra-party identity to voters.

Candidates proximate to this faction often presented their legislative goals in transformational terms, with policies such as Medicare for All and free college tuition framed as healthcare and education as rights. Candidates advocated for additional regulation for the private sector so that benefits of economic growth were more evenly distributed among society, frequently referring to European—especially Scandinavian—social democracies as templates. They advocated progressive values and secularism, and championed the causes of minority groups they perceived as historically or systematically disadvantaged due to race, gender, sexual orientation or identity, or physical ability, in a continuation of the agenda initially set by the New Left (Zelizer 2004).

Candidates proximate to this faction frequently expressed desire for a more participatory democracy, and for removing barriers to entry, particularly in terms of voting rights. They derided the influence of wealthy individuals, interest groups, and corporations in politics. Many candidates wanted to alter how the political system operates, with commitments

to remove corporate funding and refusal to take corporate PAC donations hinting at a desire for a different type of capitalism—or, in some cases, outright rejection of market forces. Candidates often deployed rhetorical terms such as revolution and structural change focusing on inequality and wealth disparity between the richest one percent and the rest of the population, with policies such as a $15 federal minimum wage. Many candidates in this faction viewed the Obama presidency as a missed opportunity, or as not going far enough to improve the country. Candidates proximate to this faction acknowledged that some good policies came from the administration but also expressed concerns in many areas (e.g., the commissioning of drone strikes).

3.3.2 Establishment Democrats

Establishment Democrats largely believed in using existing political structures to solve inequalities in American society, with policies such as working within current systems to make healthcare more affordable or tying minimum wage increases to inflation.[82] Rather than advocating for broad changes to the functioning of American politics or society, candidates prioritized the protection of provisions won in key policy areas, such as the Affordable Care Act (ACA), with incremental additions. They often framed themselves in pro-business terms and in Congress sat in the New Democrat Coalition, Moderate Dems Working Group, or, at their moderate end, the Blue Dog Coalition.

Throughout the period of study, the faction largely retained control of the formal apparatus of the Democratic Party, including the Democratic National Committee (DNC), the Democratic Congressional Campaign Committee (DCCC), and the Democratic Senatorial Campaign Committee (DSCC). The domination of the formal party apparatus by the establishment faction was a frequent grievance of progressive candidates, particularly when they became involved in primaries. The establishment faction coordinated through these organizations and groups such as the Democratic Leadership Council, with funding coming from organizations such as the New Democrat Network and NewDemPAC, as well as from favorable business groups. Candidates proximate to this faction received endorsements from or made statements affiliating themselves with figures such as Bill Clinton, Joe Biden,[83] and Dianne Feinstein.

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[82] By the end of this period, many candidates were also presenting benefits of some form of public health coverage, though usually not Sanders' Medicare for All plan, or advocating for the abolition of private insurance. Adoption of this policy was frequently cited as evidence of the growth in power of progressives and the leftward shift in the party.

[83] The coding for this thesis was undertaken in 2019 and during 2020, prior to the November election victory of Joe Biden. In the early months of his presidency, Biden has occasionally been framed by the media as pursuing progressive goals or of being more

Establishment Democrats advocated their abilities to solve problems in Washington by working across the aisle to end gridlock with a pragmatic approach to achieving legislative goals including a willingness to compromise. They were often critical of progressives for taking ideological approaches which they dismissed as unrealistic. Toward the end of the period, candidates were critical of the perceived leftward shift in the party, for example blaming poor electoral performances on non-centrist positions: "[we must] not ever use the word 'socialist' or 'socialism' ever again...we lost good members because of that" (Rep. Abigail Spanberger, quoted in Bade and Werner 2020).[84] Economic policies offered by this faction were more favorable to business groups, with less regulation and stronger support for free trade and international agreements. Examples included raising the minimum wage in line with inflation or negotiating better terms for patients with private healthcare providers. In terms of foreign policy, establishment candidates were more comfortable advocating increases in defense spending. Candidates aligned with this faction were more likely to have supported foreign interventions during the twenty-first century, though they rarely mentioned this directly in primary campaigns.

Attitudes to race are at the heart of the Democratic intra-party cleavage, framed as a division between pursuing more equitable policy outcomes or broad electoral appeals, or as Bacon argues, with different approaches to answer the question of "how does the party advocate for civil rights causes and a truly multiracial nation while not offending too many White voters?" (2021). This inherent division also reflects the party's organizational structure as a coalition of group interests (Grossmann and Hopkins 2016).

At the most centrist end of this faction are members of the Blue Dog Coalition, formally created in the 1990s to denote socially and economically conservative Democrats who mostly represented rural districts and states. Where Blue Dog candidates were observed in the data, they were coded as proximate to the establishment Democrat faction. Though Blue Dogs were at the centrist end of the party, they did not differentiate themselves from establishment Democrats in ideological terms and held similar policy positions and rhetoric. Other studies indicate that by the period of this study, the Blue Dogs had largely been integrated into the New Democrat Coalition and were no longer as centrist as they had been in previous eras (Thomsen 2017b), becoming party insiders who were integrated into the party by the time

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liberal than previously positioned throughout his extensive career. Analysis of the Biden presidency is beyond the scope of this thesis. At the time of coding candidates and before, Biden was widely seen as an orthodox figure within the party, and certainly not conceived as a progressive.

[84] Progressives disputed this framing, "So the whole 'progressivism is bad' argument just doesn't have any compelling evidence that I've seen." (Ocasio-Cortez 2020)

Democrats regained the House majority in 2006 (Pearson 2015). The spread between Blue Dogs at the most centrist end and Obama-like New Democrats at the most liberal covers the ideological breadth of this faction.

3.3.3 Establishment Republicans

The establishment Republican faction espoused traditional conservative views such as small government, individual liberty, and free-market economic policy throughout this period. Candidates proximate to this faction advocated reduction of, or limitations on, the federal government at a systemic level, positioning themselves as pragmatic problem solvers who would improve government by ending gridlock through their ability to work across the aisle. In doing so, they often chastised the polarized environment of political conflict in the twenty-first century. These candidates rarely openly embraced either the Tea Party or Donald Trump during their primary campaigns, though they were seldom openly hostile to either. In Congress, membership of caucuses such as the Tuesday Group or the Republican Main Street Caucus were indicators of factional proximity.[85] When compared with reactionary Republicans, candidates proximate to this group placed less emphasis on cultural issues as a threat to (White) American identity.

Establishment groups retained influence over some of the apparatus of the Republican Party during the period of study, particularly through formal party organizations responsible for allocating funds to congressional candidates such as the National Republican Congressional Committee (NRCC) and the Republican National Senate Committee (RNSC). The faction retained the support of pro-business groups such as Chamber of Commerce Organizations and Main Street Partnership Political Action Committee. Candidates proximate to this ideal type were often referred to as pro-business or main street Republicans, terms with either positive or negative connotations depending on the speaker, audience, and framing.

Candidates cited the party's modern success in retaining important public offices, most notably the presidency, with Reagan and both Bush presidents proximate to this faction. During the period of study, the faction was ideologically broad, though its centrist end was barely visible in Congress by 2020, restricted to a few senators such as Susan Collins and Lisa Murkowski. When proximate candidates talked about politicians they admired, Reagan was most frequently mentioned. Candidates in this faction often talked about the party's history

[85] Membership of the Republican Study Group, one of the largest ideological caucuses in Congress, was not taken as an indicator of proximity to either faction. Though historically an establishment caucus, candidates proximate to both factions are now members, asking more fundamental questions about the nature of elite conservativism in the 21st century.

as anti-slavery and referred to Abraham Lincoln as the great Republican president. Among reactionary Republican candidates, this topic was notable by its absence. Several establishment candidates even invoked Democratic president John F. Kennedy, with the quotation; "let us not seek the Republican answer or the Democratic answer but the right answer" (1958) appearing on multiple campaign websites. In terms of modern figures, candidates aligned themselves with people such as Mitt Romney and John McCain.

Candidates proximate to this faction prioritized economic policies, with a strong belief in supply-side economics and global free markets. Like reactionary Republicans, they believed that cutting taxes would generate investment and leave people and businesses with more money to spend. Broad cultural issues featured less as a priority, though candidates often tried to court voters using more neutral language, for example by advocating strict border controls rather than a physical border to reduce immigration. On foreign policy, these candidates were more interventionist than reactionary Republicans, often supporting American military action overseas as necessary to maintain safety and peace, and on occasion explicitly to export democracy or American values, or to open global markets. Candidates made little mention of social or moral issues, particularly absent was a narrative of decay or of America losing its place in the world. The exception was the subject of abortion, one of the central issues—along with Second Amendment rights—that establishment and reactionary Republican candidates appeared in almost complete agreement.

3.3.4 Reactionary Republicans

The organizational structure of the reactionary Republican faction is a combination of billionaire funders, disaffected activists, and influential media figures. The establishment of the Tea Party network, described by Skocpol and Williams as "neither a top-down creation nor a bottom-up explosion" (2012, 12), provided a greater platform for proximate candidates to run for Congress. As noted previously, this faction is best understood in ideological terms, located to the right of traditional conservative movements (Blum 2020; Skocpol and Williamson 2012). Scholarship has positioned the Tea Party—both as a movement across the country and as a faction within Congress—as paving the way for the Republican Party's Trumpian turn (Blum 2020; Gervais and Morris 2018; Pew Research Center 2019). Following this work, I conceive of the Tea Party-Trumpian wing of the party as a continuous faction exerting pressure from the right of the political spectrum throughout the period of analysis. Though this iteration of the faction is modern, its origins can be traced back to the John Birch Society, the 1964 Goldwater presidential campaign, and figures such as William F. Buckley who sought to move

the party rightward. In Congress, memberships of the Tea Party Caucus, the Liberty Caucus, or the House Freedom Caucus were considered indicators of factional alignment.[86]

The Koch brothers and their organization Americans for Prosperity played a central role in funding this faction, described by some as a shadow party (Pilkington 2019), with the explicit goal to "reorient the conservative political apparatus" (Vogel and Smith 2011). Funding came via activist networks such as Tea Party Express, as well as the Washington-based organizations Club for Growth and FreedomWorks. Further sources of support were religious right and pro-life groups such as Focus on the Family. Members of the faction identified with partisan media figures such as Sean Hannity, Ann Coulter, Tucker Carlson and, at the fringes, conspiracy theorists such as Alex Jones. Activist networks were given new meaning and identity through the Tea Party movement and continued to play a key role throughout the period of study. By the end of the period, candidates aligned to this faction were enthusiastic in their support for Trump. Earlier candidates in this faction expressed support for or received endorsements from people such as Ted Cruz, Mark Meadows, Michele Bachman, and Sarah Palin.

Though the faction was largely united in its worldview, some important divisions exist. The most prominent is between social conservatives and libertarians. Social conservatives are in favor of government intervention in the promotion of what they see as the moral values necessary for society to prosper. The group is highly religious and focuses attention and activity on issues such as abortion, immigration, or race—which they frame in primarily cultural terms. In contrast, libertarians advocate the eradication of almost all government intervention in domestic matters and look to figures such as Ron and Rand Paul. The main demographic difference in these groups is church attendance, with libertarians distrustful of organized religion and social conservatives attending church frequently (Skocpol and Williamson 2012, 36).[87]

These intra-factional differences paled in comparison to the unity of worldview among the group. It particularly deployed the loss frame of societal decline, namely that America had lost its way due to "freeloading social groups, liberal politicians, bossy professionals, big government, and the mainstream media" (Skocpol and Williamson 2012, 75). Candidates proximate to this faction often expressed distrust or outright contempt for elites from both

[86] Blum (2020) uses the same caucuses to identify Tea Partiers in Congress, indicating methodological legitimacy.
[87] Studies indicate that the numbers of libertarians in the American electorate is small (Feldman and Johnston 2014; R. P. Jones, Cox, and Navarro-Rivera 2013), though others sources find that this number is largely a product of identification method (Ekins 2017).

parties, but particularly Democrats, who they believed had changed America for the worse by bloating the size of government and enforcing progressive cultural changes. They were frequently hostile to minority groups whom they saw as receiving undue benefits from the government and opposed policies such as gay marriage or legal pathways to citizenship on 'cultural grounds' or through narratives of status threat. One common tactic was to position establishment opponents as not 'true' Republicans or conservatives, especially via the use of the term Republican in Name Only (RINO).[88] Both modern factions of the Republican Party claimed the term conservative as their own, chastising opponents from the alternative faction as not sufficiently or truly conservative.

Many candidates expressed distrust of expertise and prior experience in public office, seeing such qualifications as not only unnecessary for serving in Congress but potentially harmful. They advocated as small a government as possible aside from defense spending, often proposing closure of entire federal departments such as the Department of Education or the Environmental Protection Agency (EPA). Economic ideas such as flat taxation or the abolition of federal taxation were frequently part of candidates' platforms. Immigration was framed as a threat to the American way of life, with support for strict proposals on undocumented immigrants, opposition to any amnesty measures and, toward the end of the period, support for the construction of a physical barrier at the southern border. Framing change as a threat to the American way of life came from a belief that life for people like them had gotten worse in recent decades, especially believing that white people faced increasing discrimination. Candidates from this faction used rhetoric about immigrants that made references to bringing drugs and crime into the country.

Candidates proximate to the faction occasionally had direct links with white supremacist groups. More often they framed cultural issues in terms of being a threat to (White) American identity. The faction had close connections with science skeptics, often pushing back against the idea that the climate was changing due to human activity. Candidates commonly supported an isolationist foreign policy, with some advocating for withdrawal from the United Nations (UN) and international bodies such as the North Atlantic Treaty Organization (NATO) as part of an America First worldview.

[88] This term had previously been used by conservatives against Liberal Republicans.

3.4 Reasons for Primary Contests

Congressional primaries are contested for various reasons. An incumbent may be perceived as weak by an ambitious challenger, districts might be redrawn meaning local politicians see a way to earn a higher position, or candidates from a party might perceive the electoral cycle as favorable. Quantitative measures such as numbers of contests, voters, or amounts of money raised may fail to capture this qualitative variation in the dynamics of primary competition. By examining the reasons for individual primary contests, we are better able to understand the dynamics of primary competition at the aggregate level.

Reasons for primaries taking place were determined in answer to the question "why are you running for Congress?" from campaign websites or in local media interviews. Coding was based on categories established in Boatright's *Getting Primaried* (2013) which analyzes reasons for same-party challenges to incumbents between 1970 and 2010. As Boatright notes, considering the numbers of primary contests only tells one part of the story of competition; where "there have been few systematic attempts to distinguish between the different rationales for primary challenges" (2013). This coding schema supplements the coding of primaries as factional to enable the coding of primaries as ideological. Put simply, primaries are coded as factional when candidates have support from distinct parts of the party network, whereas primaries are ideological when the leading candidates frame ideological differences in same-party candidate position as the motivating reason for running for Congress. Unsurprisingly, these variables are highly correlated (0.81) despite being coded independently.

To provide a clearer picture of the dynamics of primary competition, I code the reason for contest using digital sources including candidate websites and quotes carried in local newspaper websites. It is important to note that, though care has been taken to code and categorize this considerable number of contests, some contests featured enormous amounts of digital information, but others featured relatively scarce amounts. Similarly, some contests fitted clearly into one category and others were more difficult to place. Where insufficient information to categorize a contest was found, contests were coded as 'Unknown.' Some contests may have been recoded if additional information that was never published online or was published and later removed could have been included. Accordingly, I do not claim that these data represent an absolute or definitive position on the reason for any individual contest, but, at least in the aggregate, these results can be taken as instructive. As Bawn et al. note in their study of open House contests:

> The primary environment is so uncertain and sensitive to minor events, that it is unreasonable to try to identify 'the' key factor in any particular race. Our assessments of candidates, groups and race dynamics should thus be taken as plausible scenarios, empirically relevant enough to direct theoretical attention in a productive way (2015, 5).

I urge similar caution when interpreting these categorizations. To the best of my knowledge, no other academic work has attempted to qualitatively categorize the dynamics of this number of primary contests using digital sources.

Boatright (2013) uses non-digital sources to categorize primary challenges to incumbents,[89] but notes that additional ideological races would be coded if information from candidate websites were included for the 2010 electoral cycle,[90] indicating that digital data are an appropriate source. Given their established presence on the subject, I largely maintain Boatright's categories, though some adaptations were necessary for application beyond incumbent races. Some reasons also declined due to the focus on different time periods, these categories were dropped or merged. Boatright also acknowledges that these categories are a somewhat blunt instrument for coding—"for no election truly features only one line of attack" (2013, 13)—but posits that they are a vast upgrade on merely observing numerical trends, and provide greater understanding of the dynamics of competition during the nomination process. It is necessary to note that the categorizations used[91] reflect reasons given by candidates and so may not be objective. Indeed, when trends such as a growing salience of ideology emerge, it may be that such framing is perceived as increasingly electorally profitable by candidates. Again, the practice used here is in line with the established literature. The full list of reasons for contests and accompanying descriptions are shown in Table 3.4.

Where multiple reasons were given, the highest priority reason was coded, usually determined by position in the answer to motivation for running. If an initial reason was given with further reasons, the initial reason was coded. Where a single answer could be interpreted into multiple categories, ideological context was prioritized due to the focus of this thesis. For example, a contest where a challenger criticized an incumbent's extreme views as the reason they were unable to pass legislation would be coded as Ideology–C rather than Competence/Age.

[89] Boatright uses the biannual *Almanac of American Politics* and *Politics in America* between 1971 and 2011 to code his data.
[90] Left absent for reasons of temporal consistency across his study.
[91] Both in Boatright's data and here

Table 3.4 Reasons for Contests

Reason	Description
Competence/Age	In incumbent primaries, criticism of the ability of the current officeholder for doing a poor job of representing the district, failing to deliver resources/projects to the district, spending too long in Washington, or being too old. In non-incumbent races, these contests were usually framed in positive terms with experience in other public office or experience in business most frequently given as the reason they are the most competent candidate for the district. In challenger races, this competence was often positioned as being the reason they were the most likely candidate to defeat the incumbent in the general election.
Ideology	Non-incumbent primaries which focused on ideological difference between the candidates. These were sometimes framed in positive ways, such as being the “true conservative” in the race. Other times they were framed negatively, by branding an opponent as ideologically out of step with the district, too centrist, or not sufficiently committed to the party platform, e.g., using RINO as a slur.
Ideology – C	Primary where an incumbent was challenged by a more centrist alternative on ideological grounds, often featuring criticism of the incumbent for being too extreme for the district.
Ideology – I	Primary where an incumbent was challenged by a less centrist alternative on ideological grounds with the incumbent criticized for being too moderate, also known as “primarying”.
Local Issue	Focused on a single local issue that was important to the district, for example water supply in districts in southern California.
National Issue	Focused on either a single national issue or where candidates focused their campaigns on different issues with no ideological context, often these races included candidates promoting specific plans in a national policy area without clashing directly with their opponent. Frequent examples included teachers who focused on education policy or medical professionals who focused on healthcare. Non-incumbent contests in this category often featured candidates focused solely on their issue (or couple of issues) without referring to their opponent.
Other/ No Reason	Either the contest took place for an unspecified reason (e.g., “I just felt like doing it”/ “all races should be contested”) or for a reason which fell outside of the other categories. This was sometimes for tactical reasons, to disrupt the competition, or to help the alternative party.
Race	Candidates’ race was specifically mentioned as the reason for the contest. Often involving claims that only a minority should represent a minority-majority district or challenges between candidates from different minority groups.
Scandal	The dominant theme of the campaign was a specific perceived wrongdoing by one of the candidates. Most cases involved allegations of either sexual or financial misconduct.
Unknown	Unable to find enough information about one candidate or the nature of the contest to categorize.
Challenger Solo	No primary contest: one candidate running for office in a challenger seat.
Incumbent Solo	No primary contest: incumbent as the only candidate running for office.
No Candidate	No primary contest: no candidates running for the seat, no party candidate stood in general election.
Open Solo	No primary contest: one candidate running for office in an open seat.

It is, of course, possible to dispute some codes, as Boatright also points out using the example of Ned Lamont challenging Joe Lieberman in 2006, coded as ideological but interpretable as motivated in large part by a single issue, the Iraq War (2013, 68). Similarly, Marie Newman’s 2018 and—ultimately successful—2020 challenges to incumbent Dan Lipinski were coded as ideological, but his anti-abortion position featured prominently in Newman’s campaign literature. Where a single issue could be interpreted as part of a wider differentiation of ideological platforms, as in these examples, contests were coded as ideological. When issue positions did not reference wider ideological contexts, or campaigns focused on an issue without taking distinct positions, primaries were coded as National Issue or Local Issue accordingly. As with factional proximity, all data were hand-coded by the author to ensure consistency.

3.5 Conclusion

This chapter introduced the variety of sources used to construct the dataset for the empirical analyses in the chapters that follow. Most importantly, it introduced and clarified the approach for coding primaries as ideological and factional. For all data, I describe how sources are used with strengths and weaknesses, advocating the necessity of including multiple sources to conduct my qualitative analyses: the hand-coding of factional support of congressional primary candidates and the reason for contested primaries taking place, these are the original data that are used in this thesis. Having introduced my data, I now turn to identifying descriptive trends in the dynamics of primary competition during this period in answer to the first research question.

Section Two:
Primary Transformation

4 Ideological & Factional Primaries: The New Dynamics of Congressional Nominations

Accomplishments have never meant less in a Republican primary.

Republican party activist[92]

Given that direct primary elections date back to the Progressive Era, and that Congress experienced a significant period of *de*polarization following their introduction, any debate about whether primaries polarize must first descriptively demonstrate that the *dynamics* of primary competition have shifted in recent decades. In this chapter, I make the case the that recent changes in the dynamics of primary competition are best understood as a 'transformation' during the second decade of the twenty-first century. Between 2006 and 2020, previously sleepy, low-interest affairs between local party elites transformed into faction-oriented competitions infused with policy content. As a result, ideology became the main reason for primary contests in both parties, with comparatively fewer primaries motivated by valence factors such as personal competence or prior experience in public office. These trends are systematically documented in this chapter, where first Republican, then Democratic primaries became dominated by intra-party ideological difference between candidates aligned to competing factions. This transformation is a direct result of growing numbers of candidates with the support of their parties' realigner factions—progressive Democrats on the left and reactionary Republicans on the right—contesting congressional primaries on ideological grounds.

Though the overall trends regarding transformation are similar across the two parties, clear partisan differences exist. Increased campaign spending and voter turnout following transformation have been particularly notable in Democratic primaries.[93] In other ways, including shifts in the framing of primary campaigns, the parties were more similar. In both parties, after an initial 'wave' election—where transformation first took place in challenger primaries—a sustained period of transformation, including in incumbent contests, was present in the following election cycles.

[92] Quoted in Walter (2021)

[93] The question of *why* partisan differences exist is analyzed in the following chapter alongside broader questions about what caused the descriptive changes documented in this chapter.

4.1 Transformation of Congressional Primaries

The competition between Bruce Braley and Rick Dickinson discussed in the introduction was a common example of pre-transformed primary competition, though even this race featured more competition than most. Braley and Dickinson were competing in a vacant open seat following an incumbent's retirement, where the partisanship of the district and national partisan mood indicated that the seat was ripe for a Democratic representative to win office. The modal level of intra-party competition in 2006 was *no* competition, with both parties not having contested nominations in most districts. When primaries did take place, they tended to be personality-driven affairs between candidates claiming they could better represent the interests of the electorate and more effectively 'deliver' for the state or district. Campaigns in these congressional primaries focused on narratives of competence and experience in state politics or other areas such as in military or business positions, resulting in contests focused on the relative competencies of the character and personality of candidates. These personality-focused contests tended to be local affairs, rarely involving policy differences, though if they did these were focused on local issues such as the building of a new road or school within the district rather than on national infrastructure or education policy. Spending in these campaigns was relatively low, and voters were generally uninterested in intra-party contests other than for the presidency.

Table 4.1 Dynamics of Primary Transformation

Dynamic	Pre-Transformed	Transformed	Measure
Frequency	Rare	Common	Any primary
Support	Candidate-centered	Faction-oriented	Factional primary
Reason for contest	Valence factors	Intra-party alignment	Ideological primary
Campaign spending	Low	Higher	Mean spending
Turnout	Low	Higher	Voting age population %
Competitiveness	Low	Still (relatively) low	Fractionalization

By the end of the period, the dynamics of the primary observed in the competitions between Marie Newman and Dan Lipinski in 2018 and 2020 had become far more common. Contested primaries were now the modal level of competition across incumbent, challenger, and open seat races,[94] and these contested nominations often served as arenas of faction-centered competition between ideologically coherent and diffuse groups focused on policy agendas. These factions were highly organized, with distinct ideologies, sources of funding, and affiliated interest groups. During the period of analysis, many nomination contests in both

[94] To reiterate, open seat primaries are where no incumbent runs for either party, incumbent primaries are contests where the incumbent officeholder is running in that party's primary, and challenger primaries are where the incumbent runs in the alternative party's primaries, meaning candidates are competing for the right to face the incumbent in the November general election.

parties transformed into sites of struggle for power between factional groups, with ideological implications for party identity and campaign spending.

This chapter proceeds by examining each of these dynamics in turn. I demonstrate that primaries underwent significant changes during this period, and that these changes are part of a lasting reorientation in primary competitions along each dynamic. Of course, it may be that for a given dynamic, no change is present. Finally, we may observe shifts in these trends in response to the electoral conditions in a single election cycle, often conceived of as a 'wave'[95] election, after which dynamics return to their pre-wave levels. I examine temporal trends for each of the dynamics presented in Table 4.1 in turn. In broad terms, the evidence presented here indicates that the candidate side (frequency, support, reason for content, campaign spending) of primary elections has transformed but been more limited in terms of primary voters' responses (turnout, competitiveness).

4.2 Evidence of Primary Transformation

I assess the dynamics of primary competition using the data described in the previous chapter. Some of these metrics, such as frequency of contests, require simple counts of the numbers of contested primaries, whereas others—such as whether contests are factionally-oriented or candidate-centered—require qualitative assessment. The following sub-sections demonstrate the temporal trends in each of the dynamics in Table 4.1 in turn.

4.2.1 Frequency

Primary frequency was assessed using a simple count of the number of primaries that included at least two names on the ballot. These figures are shown by party and chamber of Congress in Figure 4.1. At the start of the period, primary competition was notably scarcer, with less than one in three House districts featuring a contested Democratic primary, and less than one in four Republican nominations contested. Following the Tea Party's entrance into the nomination process, Republican Party primaries became more commonplace, with 272 of the 428[96] House districts included in this study holding contested Republican primaries in 2010. After the 2010 'wave', numbers of Republican primaries did decline but remained far higher than they had been prior to transformation, where the average number of contested nominations between 2012 and 2020 was roughly double the 2006 to 2008 average.

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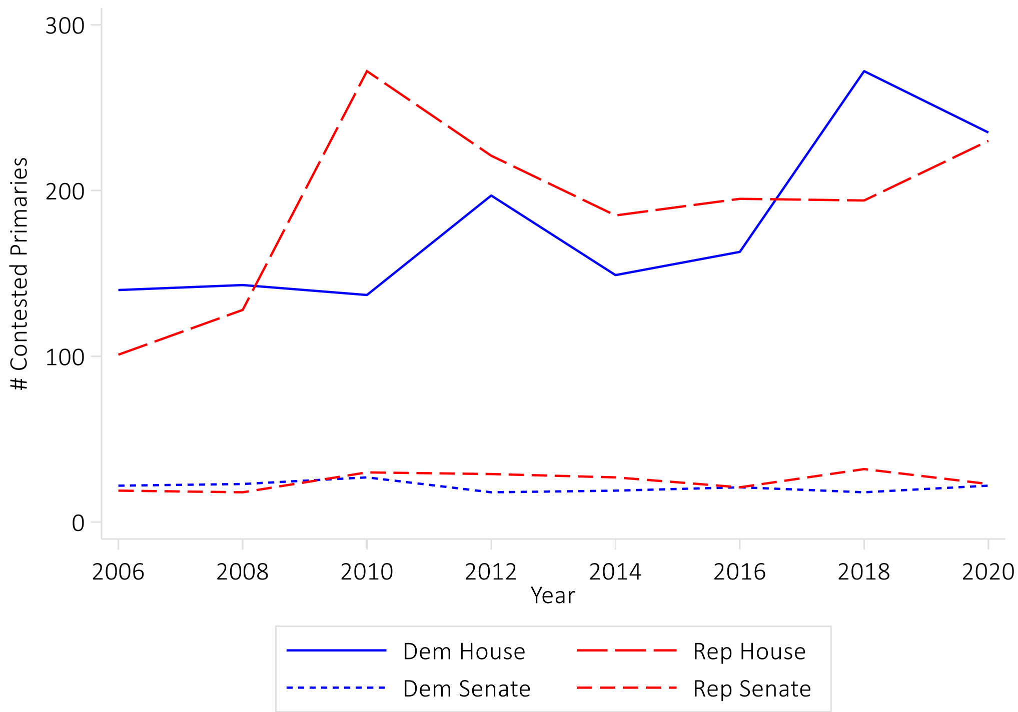
[95] Broadly defined as a cycle in which one party makes significant gains in the House or Senate in the November general election (Media Definitions of a Wave Election 2022).
[96] As stated previously, Louisiana is excluded from these data due to the non-use of primary elections.

Figure 4.1 Number of Contested Primaries



A different trend can be observed in the Democratic Party, where numbers of primaries remained relatively flat between 2006 and 2016, a small spike in 2012 aside. Transformation in the Democratic Party, as with the previous trend in the Republican Party, came during a 'wave' election. For the Democratic Party, that election was 2018 (272 contests), with 163 more contests than 2016. Though it would be preferrable to include more electoral cycles after 2020 to demonstrate a continuation of the pattern of transformation,[97] the similarity between 2018 and 2020 in the Democratic Party and 2010 and 2012 in the Republican Party are clear, with almost identical numbers of contested primaries in those years. Indeed, we will see further ways that these two-election trends are strikingly similar in this chapter.

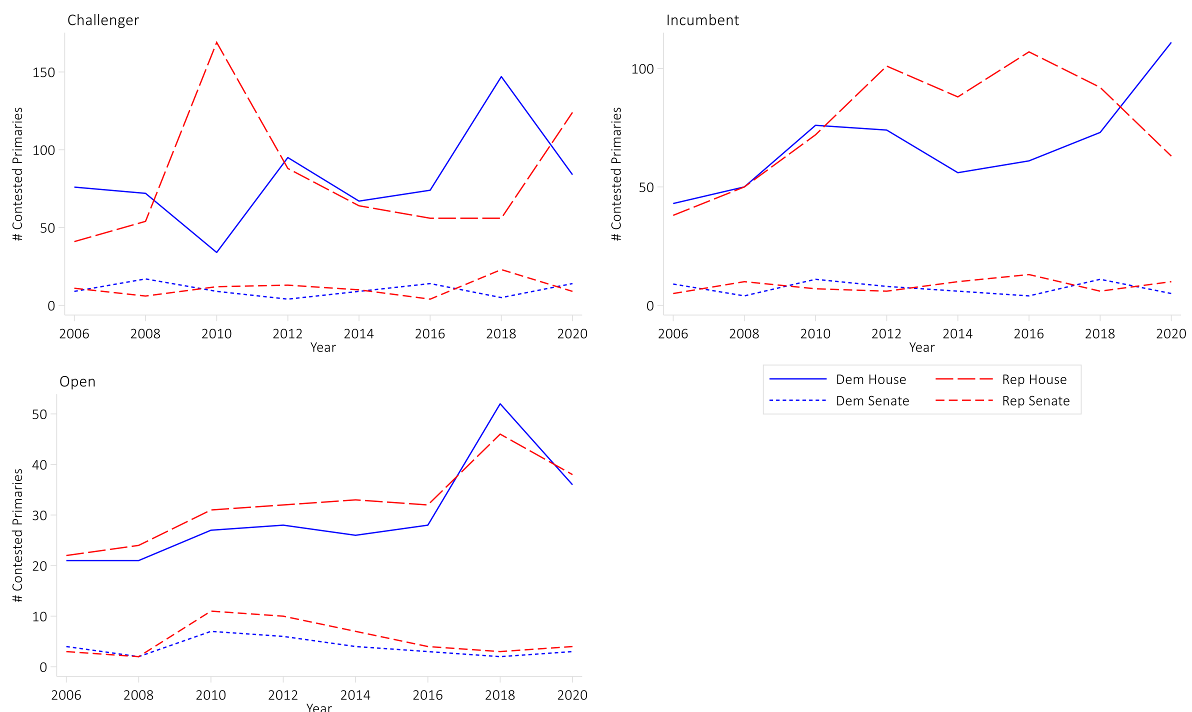
These 'wave' elections are therefore best understood as ushering in a new era of primary competition in both parties, rather than seeing primary competition returning to previous levels in future elections. The years 2010 and 2018 respectively saw the highest level of contests in the Republican and Democratic parties and have several similar characteristics. Each came two years after a presidential election in which the respective party not only lost but were defeated by a candidate whom much of their voter coalition saw as unfit to hold office and whose presence in the White House induced a sense of 'trauma' among the party faithful. These losses prompted reflection which involved competing ideological groups and movements staking a claim to the party label at a moment when the party lacked a clear dominant faction

[97] Initial signs from 2022 indicate that levels of contested Democratic primaries show no signs of abating.

or authority in the White House to resolve intra-party disputes. Additionally, these were good election cycles for the party, with an expectation (and realization) of significant gains in November elections incentivizing potential candidates to run for office. Consequently, it may be tempting to conclude that these trends simply reflect responses to short-term electoral factors, but the Republican data in the years since indicate a more permanent transformation. Though short-term factors appear necessary to induce these intra-party changes, what follows is best understood as a transformed environment of primary competition. Higher numbers of contests are also visible when compared over a longer period, with Boatright (2014) finding that sixty-three percent of congressional nominations between 1970 to 2012 were uncontested.[98]

Whether the incumbent is running in a party's primary (incumbent primary), is a candidate for the alternative party[99] (challenger primary), or is not running for re-election (open primary) is the most important feature of primary competition (Boatright 2014). I therefore break down the number of contests by primary type in Figure 4.2 into challenger, incumbent, and open primaries.

Figure 4.2 Number of Contested Primaries by Type



Due to a combination of underwhelming performance in the previous election and perceived strength in that cycle, the wave years of 2010 (Republican) and 2018 (Democratic) saw peaks in the numbers of contested challenger primaries. The following cycles then feature

[98] As discussed in the previous chapter, all trends are shown using the standard thresholds from the literature in the appendix of this chapter.

[99] Either running in a contested primary or unopposed.

comparatively fewer challenger contests but large and sustained increases in numbers of incumbent primaries. Though some of these fluctuations are a consequence of prior performance, there appears a consistent trend where spikes in the number of challenger primaries are followed by a prolonged period with higher levels of incumbent primaries. Though it is too soon to make a comprehensive assessment of longer-term trends on the Democratic side, the pattern to-date follows that set by the Republican Party from 2010 onwards. Indeed, the 'wave' election narrative appears an accurate description of competition in challenger primaries, but these waves have left sustained levels of incumbent primary competition in their wake.

Open primaries also became—albeit only slightly—more common during the period. Though the numbers of open primaries are more susceptible to the idiosyncrasies of an individual election cycle, specifically, to the whims of individual members of Congress, these figures indicate that when seats became open, they were more frequently contested at the end of the period. One of the perceived strengths of U.S. parties in the nomination process is their continued ability to winnow the field through negative recruitment (Hassell 2018); this trend may indicate a slight lessening of the power of the party in open primaries. The 2018 cycle is particularly notable for an elevated level of open primary competition—a reflection of the substantial numbers of retiring representatives, especially among Republicans[100]—and the high rate of competition in retirees' vacant seats.

4.2.2 Support (Factional Primaries)

The second dynamic of transformation shown in Table 4.1 is the shift from candidate-centered to faction-oriented primary competitions. I demonstrate this change using the concept of factional primaries. As clarified in the previous chapter, primaries were considered factional when the two highest-placed candidates were coded as proximate to different factional ideal types. I consider change over time both as the percentage of *contested* primaries (Figure 4.3) and of *possible* primaries (Figure 4.4) that were factional. The raw numbers of factional and non-factional contests over time are shown in Figure 4.5.[101]

[100] Thirty-seven Republican and eighteen Democratic incumbents retired at the end of the 115th Congress.
[101] Thresholded versions of these graphs using winner seventy-five percent, second five percent vote share and campaign finance, breakdowns of House graphs by primary type (challenger, incumbent, open), and candidate factions by winner and second can be found in the appendix of this chapter.

Figure 4.3 Rate of Factional Primaries (as % of contested primaries)

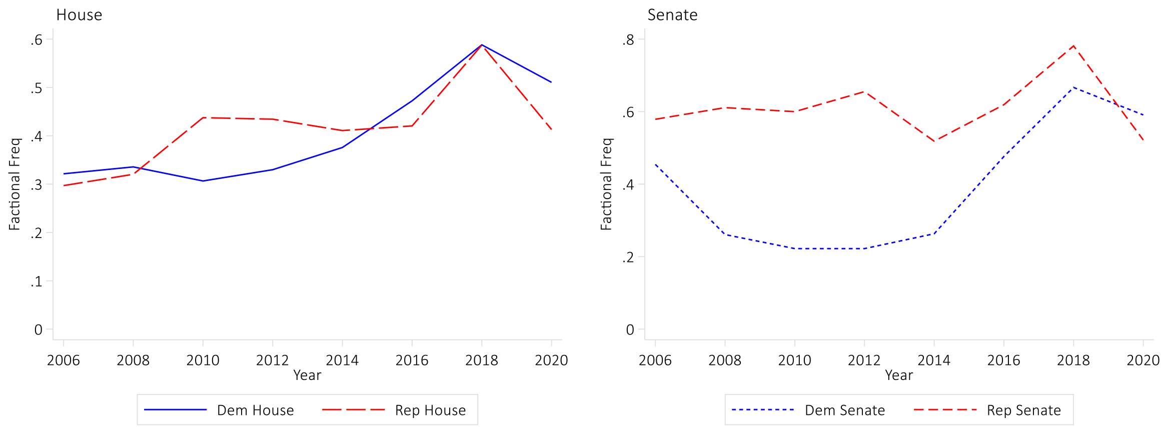


Figure 4.4 Rate of Factional Primaries (as % of all possible primaries)

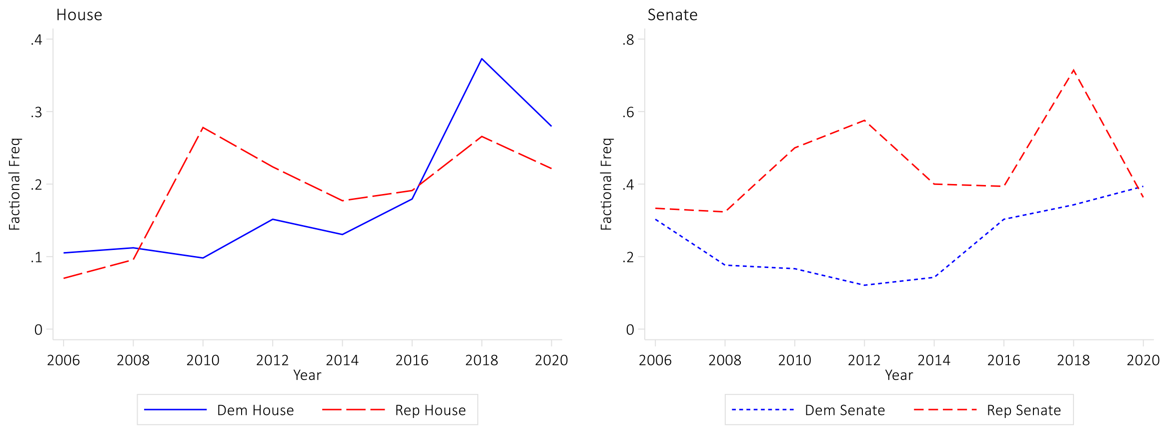
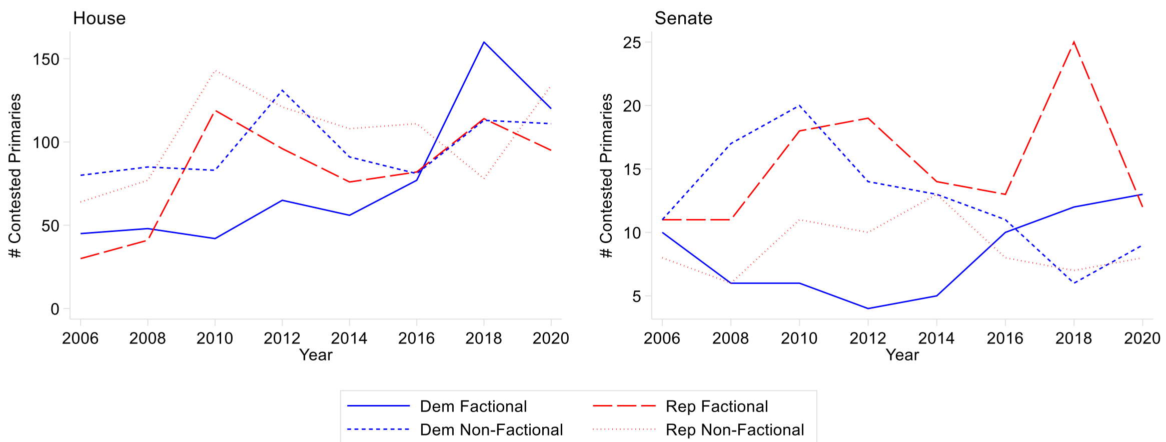


Figure 4.5 Numbers of Factional & Non-Factional Primaries



Taken together, these figures indicate that House primaries in both parties became increasingly factional during the period. For Republicans, clear increases in the rate of factional contests in both 2010 and 2018 are visible under both metrics, and where numbers of factional contests almost tripled between 2008 and 2010. The rise in factional contests can be attributed to the Tea Party's entrance into the party, with affiliated candidates almost always coded as members of the reactionary Republican faction, most often competing against establishment

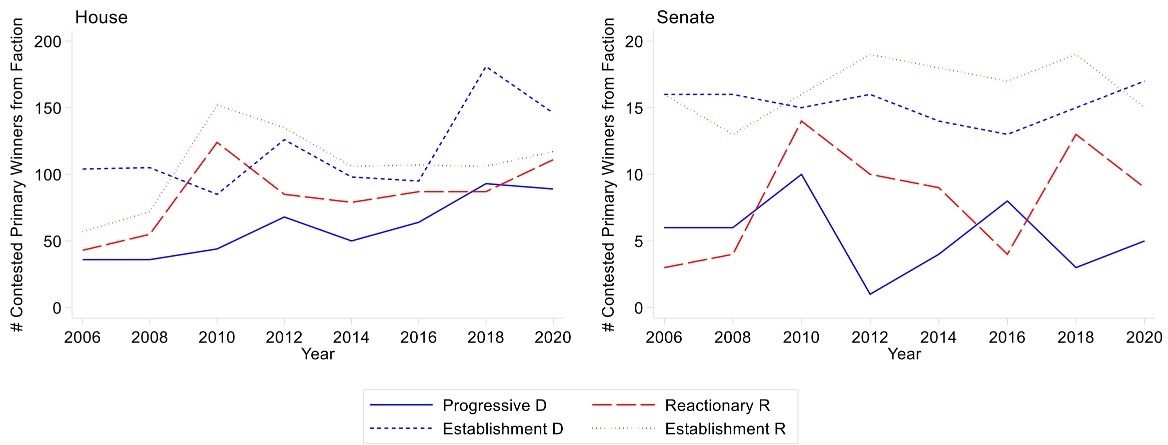
Republicans. The jump in the numbers of non-factional primaries between 2008 and 2010 was likely a combination of general disaffection with the Obama administration and candidates' perception that it would be a good election cycle for the party. These data align with other research showing that the emergence of the Tea Party resulted in more competitive and divisive Republican primaries (Jewitt and Treul 2014).

Between 2010 and 2016, rates of Republican factionalism remained relatively stable as a percentage of contested primaries, though the numbers of contested primaries declined slightly. Following the Tea Party's entrance into the Republican nomination process, rates of factionalism remained consistently higher than in 2006 and 2008 under both measures. In 2018, the higher rate of factional primaries was driven by candidates who were explicitly pro-Trump in primary contests competing with candidates who did not mention the then-president. Examples of this trend were found in incumbent primaries, such as pro-Trump challenges to Barbara Comstock and Dan Donovan, the latter by former representative Michael Grimm; open seats, such as Anthony Gonzalez's defeat of Jim Jordan-endorsed Christina Hagan in Ohio's 16th District; and challenger races, including traditional conservative Mark Callahan against white nationalist video blogger Joey Nations in Oregon's 5th District.

In 2020, the rate and number of non-factional Republican primaries increased, and factional primaries declined due to the continued 'Trumpification' of the party, with more reactionary Republican candidates finishing first or second (Figure 4.6). Contests in 2020 often took place between candidates who claimed to be more pro-Trump than their opponents, such as in open primaries in Alabama's 1st District between Jerry Carl and Bill Hightower, and in California's 50th District between Darrell Issa and Carl DeMaio. In less-favored Republican districts, primaries often continued to feature little or no mention of the incumbent president, such as in Kansas's 3rd District, where Amanda Adkins and Sara Hart Weir both made no reference to Trump and highlighted their 'establishment' credentials, such as Weir's endorsement by Main Street Partnership. By 2020, candidates who were openly affiliated with the QAnon movement were present in the data; these included Kathleen Free in Kentucky's 2nd District, Jessica Melton in Florida's 22nd District, Joshua Campbell in Washington's 9th District, and—perhaps most famously—Marjorie Taylor-Greene, who became the representative for Georgia's 14th District.[102]

[102] Taylor-Greene finished ahead of the equally conservative John Cowan in the primary, with little difference in policy or ideological preferences, her primary was coded as non-factional, with the contest dominated by Taylor-Greene's support for the QAnon movement.

Figure 4.6 Candidates by Faction



Republican trends in the Senate followed a similar pattern to the House, but with slightly higher rates and numbers of factional primaries and greater variation between cycles given that different states hold elections every two years.[103] Despite fluctuation due to fewer observations in the Senate, the pattern of increasing factionalism in Republican primaries in both 2010 and 2018 is also observed. It is also noteworthy that both parties' (though especially Republican) Senate primaries—which feature greater fundraising and higher-profile candidates—were more factional than House primaries at the start of the period of study. The argument that candidates require a network of influence to be successful in primaries, and that factional allegiance is one route of acquiring network support, appears consistent with the finding that Senate primaries might become faction-oriented earlier, and, indeed, the most notable examples of 'primarying' incumbents in 2006 and 2008 came in Senate races (e.g., Joe Lieberman, Lincoln Chafee).

Democratic trends in the House follow a similar but delayed pattern to that of the Republicans, with rates of factionalism and numbers of factional primaries remaining relatively consistent between 2006 and 2014, as shown in Figure 4.3, Figure 4.4, and Figure 4.5. From 2016 onwards, numbers of factional contests increased, especially in 2018. The small spike in the numbers of contested Democratic primaries in 2012 (Figure 4.1) did not align with higher levels of factionalism, suggesting that these contests were due to perceived elevated expectations and the redistricting process[104] rather than any shift in the dynamics of intra-party competition. Examples included Marc Veasey's and Filemon Vela's wins in open primaries in Texas's newly created Democratic-leaning 33rd and 34th districts respectively,

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[103] Meaning caution should be taken when analyzing and interpreting Senate trends.

[104] Redistricting likely impacted Democrats more than Republicans given the Republican control of state legislatures and partisan redistricting processes following the 2010 election. The 2012 primary cycle featured six Democratic incumbent vs. incumbent primaries.

where both candidates campaigned on competence issues and defeated alternative establishment-aligned candidates to become the party nominee.

Between 2006 and 2020, the number of Democratic factional primaries almost tripled (Figure 4.4). The increase in factional primaries was a consequence of greater numbers of progressives running for Congress, with roughly twice as many progressives finishing first or second in contested primaries in 2018 than had done in 2016 (Figure 4.6). Perhaps the most famous factional Democratic primary was Alexandria Ocasio-Cortez's 2018 victory over incumbent Joe Crowley in New York's 14th District, turning Ocasio-Cortez into one of the leading figures in the progressive movement and serving as a strategic blueprint for progressives running against incumbents to follow.[105] Progressives also ran in greater numbers in open seat races, such as in Illinois's 4th District where Bernie Sanders-endorsed progressive Chuy Garcia won the nomination against an establishment field, and in challenger races such as Nebraska's 3rd District where Kara Eastman defeated a comparative moderate in the primary before losing to Republican incumbent Adrian Smith in the November general election.

The emergence of progressive candidates with an identifiable and lasting coalition of voters within the Democratic Party also aligned with trends at both the presidential and gubernatorial level. Evidence from the 2014 and 2018 New York gubernatorial primaries indicates that Andrew Cuomo's support came from Clinton supporters, whereas Zephyr Teachout (in 2014) and Cynthia Nixon (2018) were preferred by Sanders' supporters (Masket 2020, 178). Recent consistency in intra-party support has been conceived as a 'lasting' or 'persistent' factionalism which now structures Democratic Party nomination contests (Masket 2020).

Trends in Democratic Senate primaries follow a similar pattern to the House, though 2006 was a particularly factional year due to several unusual candidates finishing in second place. These included a 'traditional values activist' in Ohio—whose views included abolishing the UN (Keiser 2006) and that homosexuality should be punishable by death (L. Brown 2006)—who opposed Sherrod Brown on ideological grounds. Other contests were more in line with the pre-transformed dynamic, such as perennial challenger Gene Kelly, described by the local newspaper as "the Democratic Party's version of herpes" (Nichols 2007) due to persistently running with high name recognition,[106] forcing the party to spend money in primaries to defeat him. One consequence of primary transformation has been a professionalization of campaigns

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[105] Ocasio-Cortez's campaign featured in the Netflix documentary *Knock Down the House* (2019) alongside three other progressive challengers: Amy Vilela, Cori Bush, and Paula Jean Swearengin.
[106] Kelly's more famous namesake was one of Hollywood's biggest stars in the 1940s and 1950s. He died in 1996.

following the influx of money from factionally-aligned groups, meaning that fringe candidates featured less frequently in these data, particularly in Senate races. The lack of factional Democratic contests in the middle period of the study is largely explained by the paucity of progressives who finished in the top two in contested primaries, particularly in 2012 and 2014 (Figure 4.6). As with the House, increased numbers of factional Senate primaries, along with fewer non-factional primaries, resulted in higher rates of primary factionalism from 2016 onwards (Figure 4.3 and Figure 4.4). Democratic Senate primaries, like those in the Republican Party, tended to be slightly more factional than House primaries throughout the period.

These trends show a clear pattern of more nominations being contested on factional grounds, with leading candidates proximate to different intra-party factions and receiving support from distinct parts of the party network. The operationalization of contests as *factional primaries* serves as one of the main independent variables in the later empirical chapters. The purpose of this sub-section has been to demonstrate that support in primary elections has undergone substantive change in the period of analysis, which may help explain both whether and how primaries may contribute to polarization in Congress.

4.2.3 Reason for Contests (Ideological Primaries)

As an additional check on the factional primary category (to ensure that the above findings were not an artefact of my coding scheme) and to maintain continuity with the existing literature on primaries, I also assign reasons for primary contests taking place following the approach detailed in sub-section 3.4 of the previous chapter. The main contribution of this sub-section is the construction of an additional variable, *ideological primary.* Analyses in this chapter and future chapters are performed—separately—using the variables for ideological and factional primaries. As described previously, the reason for contest categories used here largely follow the coding scheme set out by Boatright (2013) for incumbent primaries, with minor modifications to enable the inclusion of challenger and open contests. An additional justification for including the reason for contest when looking at the dynamics of congressional primaries is that they provide a fuller picture of the competition as stated by the candidates involved.

Figure 4.7 shows the reason for contest variable over time for the House.[107] The main dynamic of interest is the number of ideological primaries. The three Ideology categories introduced in Table 3.4 are initially merged under the heading Ideology (All) to include

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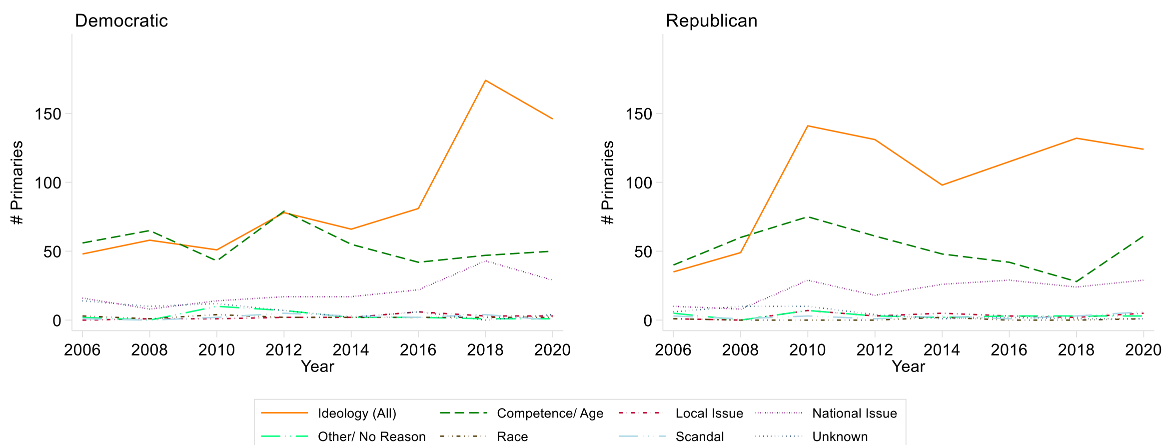
[107] Again, these trends with electoral and financial thresholds, as well as with breakdowns by primary type, are presented in this chapter's appendix.

incumbent and non-incumbent primaries in these data. The increase in the National Issue category in later cycles is also notable.

Figure 4.7 House Primaries by Reason for Contest



The Republican House data (Figure 4.7, right) indicate higher numbers of ideological contests following Tea Party entry in 2010. Prior to 2010, the Competence/Age category was the most common reason for contest, with candidates' personal characteristics and capabilities dominant. Consequently, these contests were often negative, such as in Illinois's 8th District between David McSweeney and Kathleen Salvi in 2006 where both campaigns ran personal attack advertisements claiming the other could not be trusted despite sharing similar platforms and policy positions.[108] Other primaries in this category were more positively framed, with candidates claiming that their prior experience in local public office or other fields—commonly business or military careers—would make them effective representatives in Washington who would deliver resources to the district. Examples include Justin Winner's 2006 challenge to Barbara Cubin—Wyoming's incumbent representative—on the grounds that he would be able to deliver more federal resources to the state.

Between 2010 and 2018, the frequency of Republican primaries in the Competence/Age category declined in every election cycle, even in years where the overall numbers of contests increased. The 2020 election cycle saw more competence-based Republican primaries than there had been since 2012. Competence/Age primaries in 2020 were sometimes a consequence of candidates framing loyalty to Trump as a signal of their competence, such as in the open primary in Alabama's 2nd District where Barry Moore and Jeff Coleman who claimed that their characteristics and backgrounds demonstrated personal loyalty to Trump and that they had abilities which would help him in Congress. In other primaries, competence was framed—

[108] Transcript of attack ads found at Skinner (2006)

as it had been in the pre-transformed era—as an ability to win in Democratic districts, particularly in seats that the party had lost in 2018, such as the challenger primary in Illinois's 14th District between Jim Oberweis and Sue Rezin.

Ideology was the most common reason for Republican primaries from 2010 onward. Despite this proliferation of ideological challenges, only two incumbents—Robert Inglis in South Carolina's 4th District and former Democrat Parker Griffith[109] in Alabama's 5th District—were defeated. Inglis later put his defeat to a Tea Party activist down to his insufficiently conservative stances, particularly on climate change (Breslow 2012). After 2010, ideological difference remained the most frequent reason for contest. Though numbers declined between 2010 and 2014, they increased again afterwards and had almost returned to 2010 levels by the end of the period.

In 2010, National Issue became a more common reason for contest, with relatively stable levels thereafter. The main national issue motivating Republican primaries was immigration, with taxation next most common. A typical National Issue contest was Peter Gounares' 2010 challenge to incumbent Jo Bonner in Alabama's 1st District which attacked his support for bank bailouts and campaigned on deficit reduction (Reilly 2010). Non-incumbent contests in this category were often fought between two candidates who prioritized a different issue in their campaigns which tended to be more cordial, with limited personal attacks and focus on policy goals. In challenger races, many candidates signaled difference from the (alternative party) incumbent's issue position, rather than attacking their (same party) primary opponents' policies or competence. One example was Texas's 17th District in 2010, where Republicans Bill Flores and Robert Curnock ran issue-focused campaigns claiming they were more in line with the districts' positions on several national issues than Democratic incumbent Chet Edwards.[110]

As with rates of factionalism identified in the previous sub-section, ideological Democratic contests became more common later in the period. Between 2006 and 2014, ideological and competence-based primaries occurred in similar numbers. During this time, competence challenges were frequently directed towards incumbents in negative terms, such as in New York's 10th District in 2006, where Charles Barron claimed incumbent Edolphus Brown had been in Congress too long and was no longer doing enough for the people of the district. Brown framed his challenger using similar negative attacks, claiming Barron lacked

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[109] Griffith only became a Republican in 2009.
[110] Flores went on to defeat Edwards in the general election.

credibility (Hicks 2006). Non-incumbent races also had the potential to turn negative with attacks on personal grounds, such as in the open race in Arizona's 8th District in 2006 between Gabby Giffords and Patty Weiss (Scarpinato 2006).

Divergence between the competence and ideology categories began in 2016 with an increase in ideological primaries and a decline in competence-based contests. Numbers of ideological primaries then more than doubled in 2018. One prominent example was in Colorado's 6th District where DCCC and Steny Hoyer-supported lawyer Jason Crow defeated OurRevolution-backed author and businessman Levi Tillemann in a challenger primary. Neither candidate focused on the Republican incumbent, instead offering distinct policy platforms and differentiating themselves in explicitly ideological terms, with Tillemann likening his campaign to Bernie Sanders' 2016 presidential run. Marie Newman's 2018 and 2020 challenges discussed in the introduction were also coded as ideological. These trends align with data from Hassell (2018, 181) which run to 2014 and indicate ideological difference among Republican candidates from 2010 onwards, with no equivalent found between Democratic primary candidates.

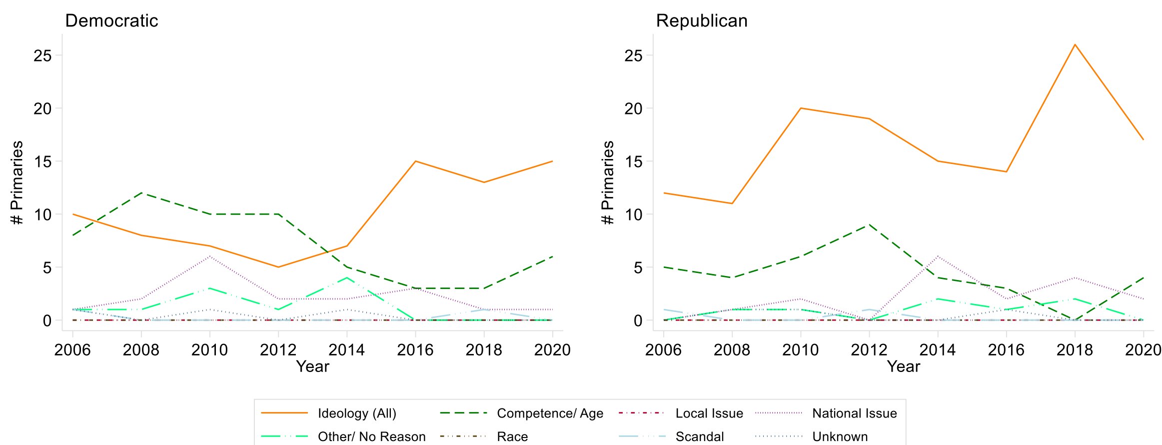
As with the Republican trend, National Issue also became a more common reason for Democratic contests in later cycles, with healthcare the most frequent issue raised and education second. These primaries were often contested by healthcare or education professionals who framed experience in terms of policy recommendations in their field, a shift in framing from general competence to specific policy knowledge or experience. One such example was in Arizona's 4th District in 2018, where physician David Brill defeated nurse Delina DiSanto in a contest dominated by discussions of healthcare policy (Aleshire 2018).

It is also worth briefly considering categories that did not change. Despite far higher quantities of primary contests in both parties by the end of the period, numbers of primaries motivated by scandal, local issue, race, or for other reasons saw little in the way of change.[111] The scandal and race categories, like the competence category, concern contests that focused on the personal characteristics or actions of a specific individual. If personal characteristics have become a less salient intra-party issue, the finding that these types of primaries did not increase should not be particularly surprising. The finding for the local issue category can be explained by the trend of increasing nationalization of U.S. politics (D. J. Hopkins 2018), where

[111] I leave absent any commentary about the decline of the Unknown category given it is likely that more information was available in recent election cycles due to the nature of digital sources.

voters make decisions, even in local elections, based on national cues. The subject of nationalization is returned to in greater detail in the following chapter.

Figure 4.8 Senate Primaries by Reason for Contest



The equivalent Senate trends are shown in Figure 4.8. Republican Senate primaries were already largely ideological by the start of the period, though notable further increases in ideological contests occurred in 2010 and 2018, in line with House trends. The high number of ideological contests in 2006 included challenges to incumbents, such as Mike DeWine in Ohio and Lincoln Chafee in Rhode Island, a centrist challenge to incumbent John Ensign in Nevada, open contests in Tennessee and Vermont, and multiple challenger races. By the end of the period, almost all contests were ideological, with candidates such as John James in Michigan endorsed by President Trump during his 2018 primary campaign on ideological grounds (J. W. Peters 2018). This trend suggests that, to perform well in a Republican Senate primary, candidates required factionally aligned support networks and clear ideological positions within the party in these higher-profile and more expensive contests. Throughout the period, ideological difference dominated all types of Republican Senate primary. Competence challenges declined as a reason for contest, and in 2018 no Republican Senate primary was coded as competence based. National Issue also grew in frequency and was the second most coded reason for contest in 2014 and 2018, though with small numbers as ideological reasons dominated.

As with other trends in the Democratic Party, ideological differences in Senate nominations became prominent later. After 2006, ideological reasons only emerged as the most frequent reason for contest in 2014 and were never as common as in Republican Senate primaries. Competence/Age was the main reason for Democratic contests between 2008 and 2012, though declined afterwards. In 2010, a spike in the National Issue category came largely (five of six contests) from races between progressive candidates who focused on a single policy

area, including campaign finance reform in an incumbent race in Vermont, and corruption in an open race in Maryland. In 2014, a single candidate—William Bryk—was responsible for three of the four Other/No Reason codes. Bryk stood in multiple Senate races with no policy platform and finished second in Alaska, Idaho, and Oregon, believing that every candidate should face a contested primary.

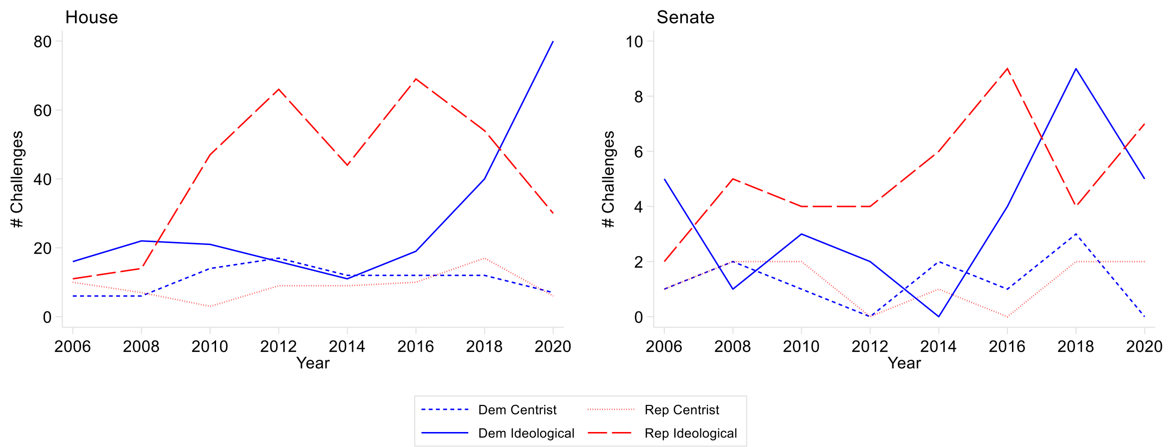
Though the trends observed here align with the growing numbers of factional primaries identified in the previous sub-section, these results provide further evidence of the transformation of first Republican and then Democratic primary contests. Ideological primaries were coded independently from candidates' factional proximity, indicating the robustness of these trends to different coding schemes. Whereas the factional trends show that leading candidates were increasingly receiving support from distinct parts of the party network, the growth of ideological primaries shows that these candidates were also framing their campaigns differently. It should be unsurprising that these trends align, with candidates who receive support from distinct parts of the party highlighting their intra-party differences in ideological terms during the primary campaign. Of course, it may be that candidates perceive ideological motivations are a more successful strategy than competence reasons or other valence factors and so are framing themselves ideologically for electoral gain by the end of the period. Whether these data capture nothing more than a shift in candidate strategy or genuine transformation of the reasons for primary contests can be debated, but we can *at least* say that these data show a clear trend towards ideologically motivated primary competitions according to the candidates themselves.

4.2.3.1 Ideological Challenges to Incumbents

In challenger and open races, we may only say that the leading candidates present ideological differences as a reason to vote for them or not vote for their opponent, but in incumbent primaries it is possible to be more specific about the nature of the challenge by also coding the direction of the challenger. In other words, it is possible to determine the extent to which ideological incumbent primaries are a consequence of challenges from parties' ideological poles. Figure 4.9 shows that as ideological primaries have become more common, challenges from the center have remained relatively stable in both parties.[112] In contrast, 'primarying'—the practice of challenging incumbents from parties' ideological extremes—has increased in line with the greater number of ideological primaries overall.

[112] Thresholded versions of Figure 4.9 are in the appendix.

Figure 4.9 Ideological Challenges to Incumbents



In the Republican Party, instances of primarying in 2012 and 2016 were even higher than in the initial 2010 Tea Party wave, partly a function of greater numbers of incumbents available to primary. These numbers remained significantly higher until 2020, with a decline in the total number of incumbent primaries resulting in fewer challenges to incumbents from the ideological right. The 2020 decline in incumbent primaries is also a consequence of the party's poor performance in the 2018 midterms, leaving fewer incumbents to primary. An additional consideration is that most Republicans in Congress in 2020 may have been sufficiently conservative or loyal to Trump to prevent intra-party challenges on ideological grounds. Until 2016, the practice of primarying was comparatively limited in the Democratic Party. Indeed, in both 2012 and 2014 more Democratic incumbent representatives were challenged from the center than from the left. In 2018, and especially in 2020, a far higher level of Democratic primarying occurred in both the House and the Senate.

These findings are consistent with other literature on incumbent primaries. Boatright (2013, 74) finds that incumbent primaries have more commonly taken place for ideological reasons since the mid-2000s. His data indicate that, until 1996, ideology was never the most frequent reason for incumbent challenges, which arose largely due to scandals or over issues of competence. After 1996, ideological challenges—from the left in the Democratic Party and right in the Republican Party—were never outside the top-two reasons for contests in his dataset. These data show a continuation of the trend of primarying beyond 2010.

4.2.4 Campaign Spending

The next dynamic of transformation identified is an increase in campaign spending. These changes are the first that present a clear partisan divide. Democratic transformation has aligned with higher spending, whereas Republican primaries have seen only modest rises in average spending. Democratic primaries that took place on ideological grounds between

competing factions attracted greater levels of spending than other Democratic primaries, this relationship was not present in Republican primaries.

Figure 4.10 and Figure 4.11 show the total and mean amounts spent in congressional primaries by candidates who won the nomination and candidates who came second in their primary.[113] Considerably more money was being spent in congressional primaries by the end of this period (Figure 4.10), in no small part due to the greater numbers of contested primaries. Though spending in House campaigns shown in Figure 4.10 appear to follow the previously noted trends, Figure 4.11 indicates that in Republican contests, higher spending was almost entirely the result of greater numbers of contests. Republican primary winners and second placed finishers both spent only slightly more on average by the end of the period than they had at the start. In contrast, Democratic primary winners did spend more money after transformation, with greater average spending after 2016.

Figure 4.10 Total Spending in Contested Primaries

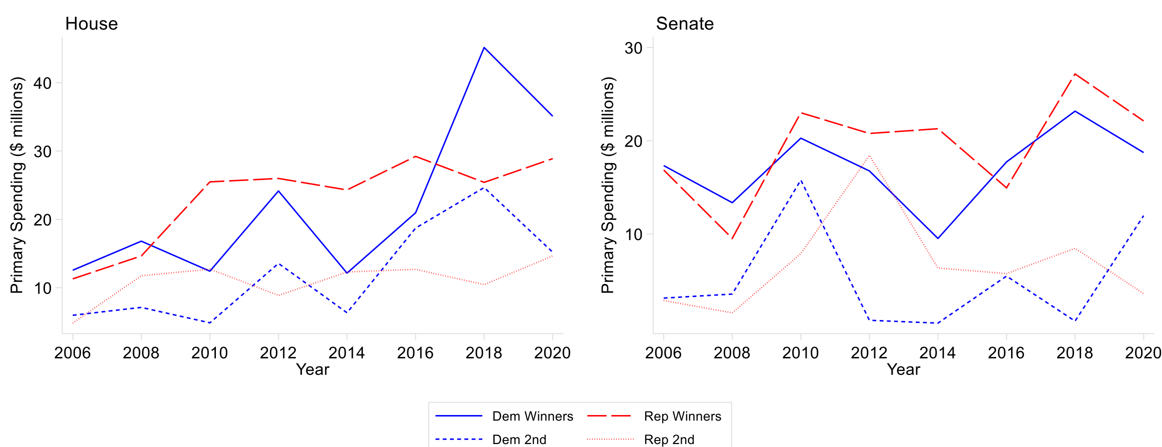
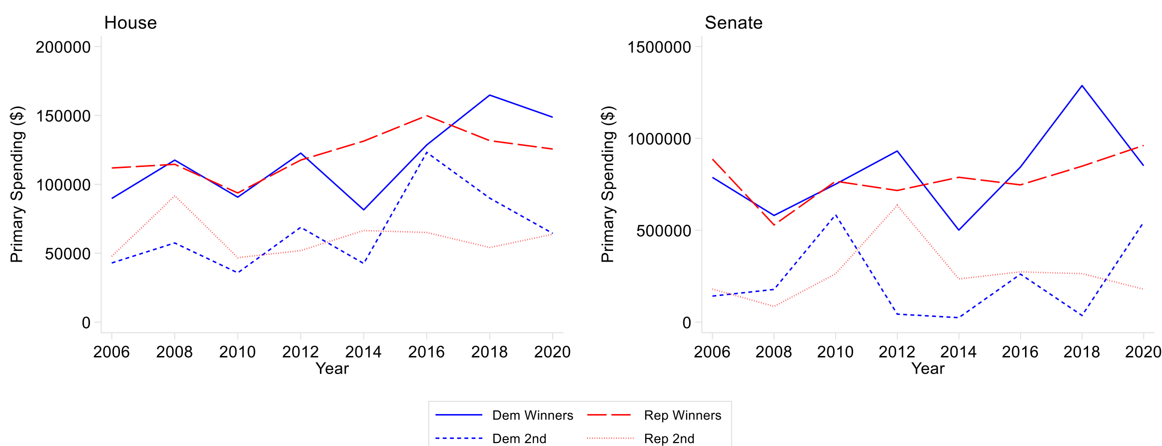


Figure 4.11 Mean Spending in Contested Primaries



[113] As discussed in chapter three, all figures are taken from candidates' pre-primary 12P FEC reports.

To consider the relationship between spending and ideological and factional primaries, total spending by the two highest placing candidates was used as the dependent variable in a series of ordinary least squares (OLS) regressions. Given the distinct partisan trends, Republican and Democratic primaries were modelled separately. These models use ideological and factional primaries as the key independent variable, controlling for other district-level variation including partisanship, primary type, district median income, percentage of voters who are White, and whether the primary was for a House or Senate race.

Table 4.2 Campaign Spending in Ideological & Factional Primaries

	Factional: Democratic	Factional: Republican	Ideological: Democratic	Ideological: Republican
Factional Primary	98,691***	–18,774		
	(34,144)	(36,977)		
Ideological Primary			76,127**	–33,901
			(30,553)	(36,196)
Observations	1,523	1,631	1,569	1,667
Number of districts	468	468	468	470

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

The results in Table 4.2[114] reveal a clear partisan difference in the relationship between both ideological and factional primaries and spending by the two leading candidates. In Democratic primaries, this relationship is substantively significant (p<0.01) for both independent variables. Controlling for other factors, factional Democratic primaries featured almost $100,000 more spending by the leading candidates, and ideological primaries saw nearly as large an increase. In the Republican Party, no significant relationship exists between ideological and factional primaries and the amount of money spent by the leading candidates.[115] This finding appears in line with trends of spending by Democratic Party candidates in congressional general elections, with record-breaking fundraising totals by candidates even in states and districts where they appear to have little hope of victory. Notable examples from the 2020 cycle include Jamie Harrison's Senate campaign in South Carolina ($117 million), Amy McGrath's Kentucky Senate campaign ($93 million),[116] and Sri Kulkarni's bid for Texas' 22nd District ($5.8 million).

[114] The full model with controls is presented in Table 11.3 in the appendix.
[115] Of the control variables (not shown), Senate primaries, contested over an entire state rather than a single congressional district, attract far higher levels of spending in both parties, with just under $1 million extra spending on average compared to a House primary. Open primaries also feature significantly more spending in both parties, though incumbent primaries are not statistically different from challenger primaries (the base category). It is also notable that median income is positively correlated with spending, meaning candidates in wealthier districts spend more. District partisanship is also positively correlated, as expected, meaning that more campaign spending happens in districts that are favored for the party in the general election.
[116] McGrath won a fiercely contested, and expensive, ideological and factional primary against progressive Charles Booker.

The pattern of greater spending in ideological and factional primaries was not present in Republican contests. In Republican ideological and factional primaries, first between Tea Party and establishment candidates and later between pro-Trump and establishment candidates, spending was not significantly higher. These asymmetric dynamics reflect the different strategies of the parties' realigner factions. Whereas progressive groups were focused on bringing money into the party through wide networks of individuals, Tea Party groups—largely comprised of people already active within the Republican Party (Blum 2020)—were able to dictate the congressional nomination process from within, and so did not require an influx of money into the primary process.[117] Whereas reactionary Republicans had previously been active in the Republican Party, progressives were often new to Democratic Party politics, either because they were young or because they had previously focused their political time and energy elsewhere, such as in movement politics. These different dynamics are reflected in the distinct levels of and need for spending in congressional primaries and are elaborated on further in the following chapter.

The claim that ideological primary challengers have done better at raising money than non-ideological challengers to incumbents is prevalent in both the academic literature and widespread in media (Boatright 2013, 103). Table 4.3 shows the results of models that test this relationship, with challenger receipts as the dependent variable in a series of OLS regressions. Challengers in factional ($p<0.05$) and ideological ($p<0.1$) incumbent Democratic primaries received more receipts than those who ran in non-ideological primaries.[118] In the Republican Party, the differences between the fundraising of challengers to incumbents in factional and ideological primaries were not statistically significant.[119] These findings indicate a clear partisan difference in the ability of challengers to raise funds in factional and ideological incumbent primaries, again likely connected to different strategies from the parties' realigner factions.

[117] Blum further demonstrates that Tea Party groups had an easier time capturing the nomination in party conventions, as they could more easily mobilize their committed activists to participate and did not need to undertake primary campaigns which they often lacked the resources to mount.
[118] Including both ideological challenges to the incumbent's extreme and challenges from the center.
[119] Given the non-normal distribution of errors on the dependent variable (see Figure 11.23), a robustness check using the (normally distributed) log of the DV is presented in the appendix (Table 11.7), the results are substantively identical to those presented here.

Table 4.3 Challenger Receipts in Incumbent Primaries

	Factional: Democratic	Factional: Republican	Ideological: Democratic	Ideological: Republican
Factional Primary	32,798**	15,885		
	(16,092)	(11,924)		
Ideological Primary			25,224*	10,758
			(14,737)	(8,450)
Observations	548	610	573	627
Number of districts	226	248	229	252

Robust standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1[120]

4.2.5 Turnout

The next dynamic of interest is turnout. The first notable trend is the clear rise in the total numbers of voters participating in contested primaries during the period, shown in Figure 4.12.[121] Unsurprisingly, turnout in House primaries increased in line with the number of contests, first in the Republican and then, to a greater extent, in the Democratic Party. Participation in contested House primaries fluctuated slightly throughout the period, with slightly higher figures in presidential than midterm years, since many states hold their presidential and congressional primaries on the same date. Republican House primary turnout more than doubled between 2008 and 2010, after which participation remained flat.[122] In the Democratic Party participation remaining relatively consistent until 2016 and then saw huge increases in the final two electoral cycles in these data. Nationally, Democratic candidates in contested primaries received almost four times as many votes in 2020 as they had done in 2014. Senate trends are somewhat harder to interpret given that different combinations of states are up for election every two years, though a slight trend towards increasing participation in both parties is also present.

Given the greater numbers of contested primaries in each party by the end of the period of study, the trends in Figure 4.12 are unsurprising. To give a more accurate representation of the rate of voter participation in contested primaries, trends are calculated as the mean percentage of voting age population (VAP) participating in a contest each year in Figure 4.13. Considering turnout in this way restricts analysis to contested primaries and so is not influenced by changes in the numbers of contests. Under this metric, Republican primaries saw a steady and modest rise in voter participation following transformation. In contrast, Democratic contests—where participation declined until 2014—saw far larger jump in turnout

[120] State and year fixed effects not shown, full results presented in the appendix Table 11.4.
[121] I only report numbers for contested races given that some states do not hold a primary election in the absence of multiple candidates whereas others hold ballots even if only a single candidate files.
[122] Slight fluctuations with higher numbers in presidential cycles aside.

in the final three election cycles, where the mean turnout doubled from less than seven percent in 2014 to almost fourteen percent in 2020.[123]

Figure 4.12 Total Voter Participation in Contested Primaries

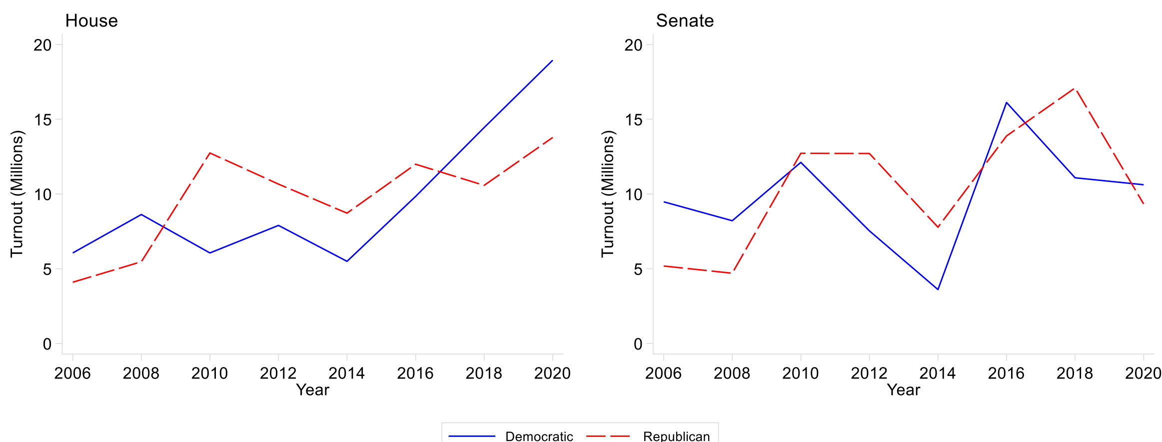
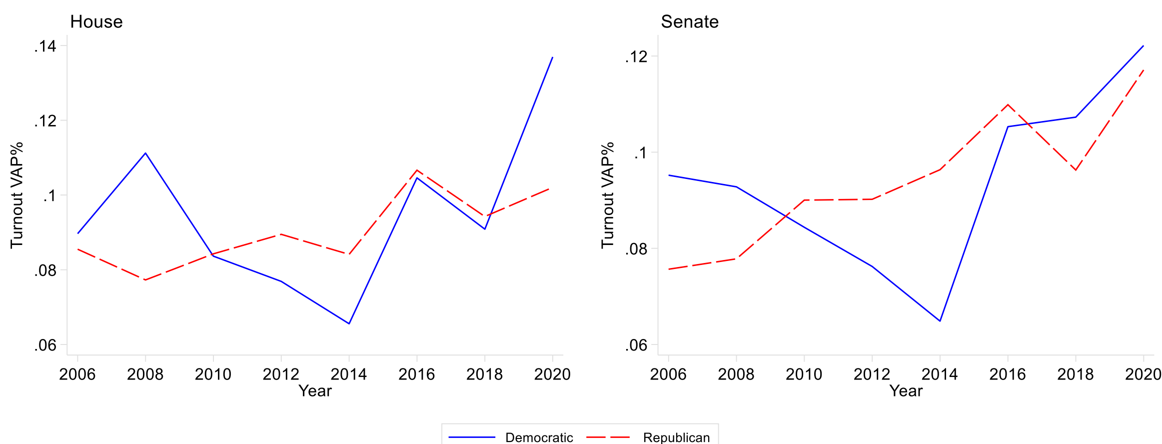


Figure 4.13 Mean VAP% Voter Participation in Contested Primaries



As with the total numbers in Figure 4.12, the trends in Figure 4.13 are not completely insulated from the influence of contested presidential primary contests. Elections cycles in 2008, 2016 and 2020 saw somewhat higher turnout for the Democratic Party, and 2016 saw slightly more Republican voters participating, though 2008 and 2012 did not. Even accounting for these election cycle particularities, a trend of somewhat greater participation in Republican primaries and a clear increase in participation in Democratic primaries are present in the respective periods of transformation. One potential reason for higher levels of voter participation is clearer differentiation between same-party candidates, with factional and ideological labels used as informational cues by voters to guide their voting behavior. Data from the first half of the twentieth century show that factional slates served a similar function

[123] The unusual nature of the 2020 primary cycle due to the COVID-19 pandemic, with in more accessible voting options in many states, may also partially explain primary voter turnout. Given the partisan discourse and differences in elite signaling over the use of voting by mail, it seems likely these changes would have impacted participation in the parties' primaries differently.

(Hirano and Snyder 2019, 149) which primary voters notice and respond to during the campaign (Hirano and Snyder 2019, 229).

To better understand the relationship between factional and ideological primaries and turnout, I again run cross-sectional OLS regressions using factional primaries and ideological primaries as the independent variables, with turnout as a percentage of VAP as the dependent variable. Given the above partisan differences, I use separate models for each party.[124] Factional and ideological primaries were not associated with higher turnout in either party, with variation in turnout largely the result of the year fixed effects. The results are shown in Table 4.4. In both instances, and though turnout increased following transformation, this trend was not driven by ideological and factional primaries, indicating that voters are not directly responding to the changing candidate-side dynamics in primary elections.[125]

Table 4.4 Ideological & Factional Primary Turnout

	Factional: Democratic	Factional: Republican	Ideological: Democratic	Ideological: Republican
Factional Primary	0.000	0.001		
	(0.002)	(0.001)		
Ideological Primary			0.001	0.000
			(0.002)	(0.001)
Observations	1,555	1,683	1,606	1,724
Number of districts	470	468	470	470

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

4.2.6 Competitiveness (Fractionalization)

The final dynamic analyzed in this chapter is primary competitiveness, operationalized here as fractionalization.[126] Though changes in the reasons for and the dynamics of primary competition have taken place in the past decade, these changes have not transformed the level of competitiveness. Incumbents still overwhelmingly win re-nomination when they stand,[127] open seats in favored districts are still hotly contested, and interest in challenger races is still highly context specific.

Table 4.5 shows OLS results for both factional and ideological contests, with fractionalization—the standard measure of competitiveness introduced in chapter three—as the dependent variable. As with previous models, party is a significant coefficient, so I run separate regressions for Democrats and Republicans. Again, I run separate models for factional

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[124] The significance of partisanship as a coefficient if both parties are modelled together is also shown in the appendix.
[125] Given the centrality of questions of voter participation in American democracy, I provide some additional commentary about the significance of several of the control variables in the appendix alongside the full results in Table 11.5.
[126] See previous chapter for details of how this variable is operationalized.
[127] And re-election, though incumbency rates have declined as partisanship has become more important (Jacobson 2015).

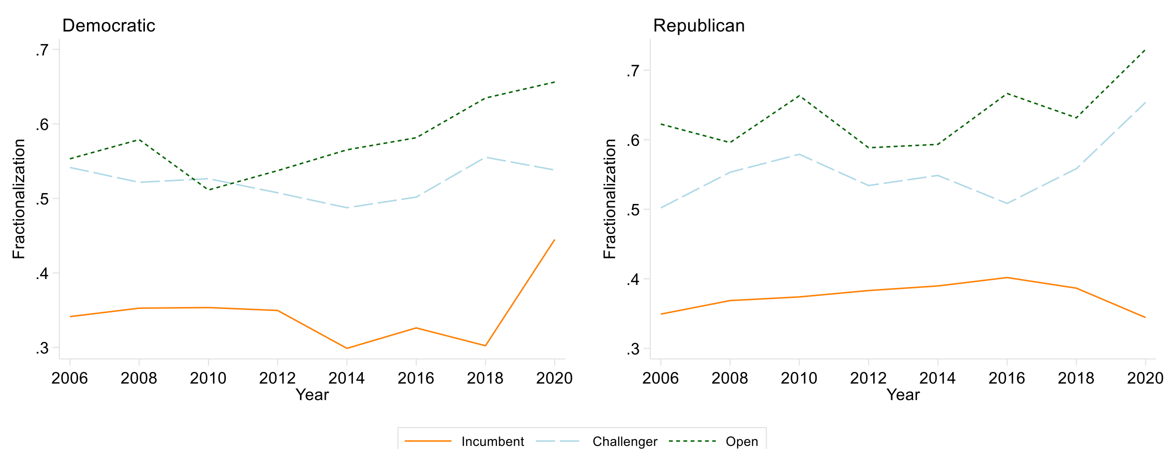
and ideological primaries. These data indicate that factional and ideological primaries are no more competitive than other primary contests, with non-significant coefficients in all models.[128]

Table 4.5 Regression Coefficients for Fractionalization

	Factional: Democratic	Factional: Republican	Ideological: Democratic	Ideological: Republican
Factional Primary	–0.009	0.002		
	(0.008)	(0.008)		
Ideological Primary			–0.011	0.009
			(0.008)	(0.008)
Observations	1,555	1,683	1,606	1,724
Number of districts	470	468	470	470

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

Figure 4.14 House Competitiveness by Primary Type

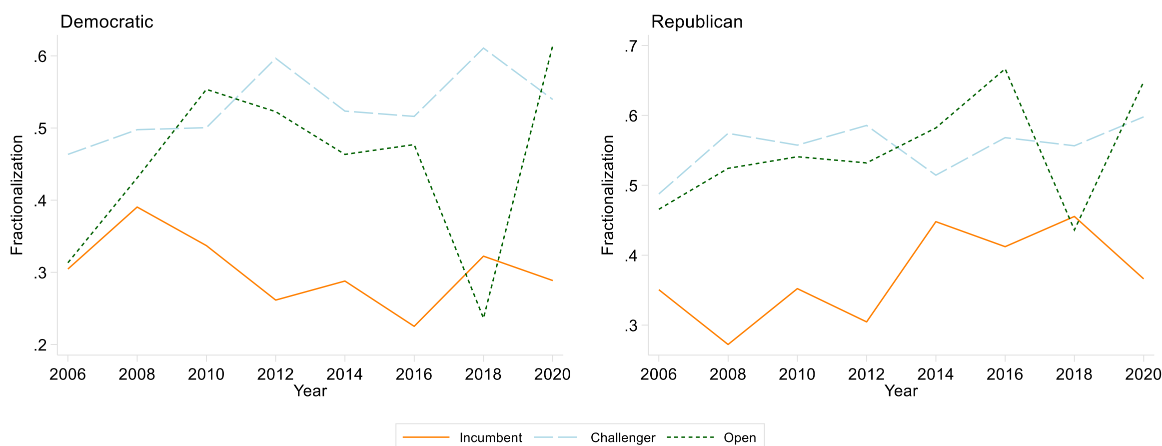


Trends in competitiveness across primary types are shown in Figure 4.14 (House) and Figure 4.15 (Senate).[129] These graphs indicate that during the period of analysis, challenger and open races have become somewhat more competitive. Though incumbent Democratic House primaries became more competitive in 2020—when numbers of factional incumbent races increased, shown in Figure 4.9—other trends in incumbent contests remained comparatively stable during the period. Certainly, and as Boatright (2013) also argues, incumbents were not under greater threat of being deposed by an intra-party challenger, since greater numbers of primaries did not make individual challenges more competitive. The level of competitiveness in House challenger primaries remained flat in Democratic primaries, though rose slightly in the Republican Party when numbers of ideological and factional primaries were higher. Open primaries, especially in the Democratic Party, did become more competitive

[128] When considering the year effects, we see that 2010 had more competitive Republican primaries, in line with literature on the emergence of the Tea Party in that cycle. In Democratic and Republican contests, 2020 was a particularly competitive year.
[129] These trends are shown across all primary types in the appendix. Failure to show these numbers by primary type has the potentially for spurious interpretation given the clear differences in competitiveness. Greater numbers of contested primaries and the increase in numbers of challenger (and, to a lesser extent open) primary contests give further interpretation problems to these graphs.

during the period, though this appears to be a continuous trend and not connected to transformation.

Figure 4.15 Senate Competitiveness by Primary Type



One interesting anomaly in the Senate data is the exceedingly low level of competitiveness in open races in both parties in 2018, possibly the result of greater party coordination—"the party deciding" (M. Cohen et al. 2008)—on candidates for this higher-profile office, potentially influenced by Republican Party indecision over a presidential candidate in the prior election cycle. Senate competitiveness returned to 2016 levels in 2020. Challenger primaries became somewhat more competitive, though incumbent primaries remained unchanged.

4.3 Discussion & Conclusion

Congressional primaries have transformed into factional contests taking place on ideological grounds since 2010, first in the Republican and then later in the Democratic Party. This chapter expands the literature focused on incumbent primaries, using original data to understand the changing dynamics of all congressional primaries between 2006 and 2020. In addition, this chapter documents the rise in ideological and factional primaries which are operationalized for use as the key independent variables for the later empirical chapters in this work. Descriptively, I demonstrate that by the end of the period, primaries more frequently took place between candidates proximate to different factions and featured ideological disagreement. During the period, intra-party ideological and factional differences became more salient during the congressional nomination process. Ideological and factional Democratic primaries saw higher levels of campaign spending, though the same relationship was not present in Republican contests. Turnout in both parties' primaries increased following transformation, though this trend was not limited to ideological and factional contests.

The evidence presented in this chapter answers RQ1, demonstrating that the dynamics of primary competition fundamentally transformed between 2006 and 2020. By 2020, primary competition was more frequent in both parties than it had been in 2006. Moreover, primaries where leading candidates garnered support from distinct parts of the party network and framed their candidacy in terms of ideological opposition to their intra-party opponent—as in the contests between Marie Newman and Dan Lipinski discussed in the introduction—became far more commonplace during this period.

These trends likely have important consequences in application to the main analytical question of whether primaries contribute to partisan polarization. That primaries now take place for ideological and factional reasons likely changes their effect in terms of nominee positioning. The operationalization of ideological and factional primaries is the key contribution of this chapter, generating independent variables used in the empirical analyses which enable the estimation of heterogeneous effects of distinct types of primary competition on nominee position. These effects have too often been overlooked and under theorized in the literature to date.

Table 4.6 Review of the Dynamics of Transformation

Dynamic	**Pre-Transformed**	**Transformed**	**Evidence**
Frequency	Rare	Common	Greater numbers of contested primaries
Support	Candidate-centered	Faction-oriented	Increased rate of factional primaries
Reason for contest	Valence factors	Intra-party alignment	More ideological primaries
Campaign spending	Low	Higher	Democratic primaries only
Turnout	Low	Higher	Increase following transformation, not limited to ideological & factional primaries
Competitiveness	Low	Still (relatively) low	No long-term change in either party, more competitive primaries in 2020, 2010 Tea Party Republican wave

The evidence presented in this chapter, summarized in Table 4.6, suggests that changes in the dynamics of competition are structural and long-lasting, rather than merely a result of short-term electoral conditions such as those present in 'wave' elections. Those dynamics that are candidate-led—frequency, support, reason for contest, policy content, and campaign spending—have been particularly notable sites of transformation, with those that are voter-led—turnout and competitiveness—changing to a lesser extent. This pattern suggests that transformation may be an elite-driven phenomenon rather than a response to bottom-up demands from primary voters. Indeed, in some areas these changes have barely been noticed by those engaged members of the public who participate in primaries, replicating the observed division between elites and the mass public in an analogous manner to narratives around partisan polarization. The sources and mechanisms of these changes are the focus of the following chapter.

5 Mechanisms: Why Have Primaries Changed?

Recent developments have created an environment in which groups seeking to promote an ideological agenda have newfound motivation, resources, and technology to launch primary challenges.

Michael Murakami[130]

Given the changing dynamics of primary competition documented in the previous chapter, I now move on to consider *why* ideological and factional primaries have become more prevalent in the past decade. In this chapter, I argue that the changing dynamics of primary elections observed in chapter four are the result of long-term, structural changes that have happened in U.S. politics and society and altered the incentives for key actors during the nomination. Given that the changing dynamics of primary competition are connected to broader trends, we should not expect them to revert to their pre-transformed state in the near future. The structural changes, key actors among whom these changes have elicited responses, and outcomes for primary competition are summarized in Table 5.1. Throughout the chapter, I argue that a combination of changing electoral incentives, regulatory reforms, and technological developments have altered the behavior of party networks, candidates for Congress, and primary voters in such a way that produced the transformed dynamics of primary competition observed in the previous chapter. [131]

Table 5.1 A Model of Change in Congressional Primary Elections

Structural Changes	Actor	Outcome
Electoral Incentives:	Party Network:	Dynamics of Congressional Primary:
▪ Increased partisan identification	▪ Organizational structure	▪ Frequency
▪ Negative partisanship	▪ Electoral strategy	▪ Support
▪ Close national elections		▪ Reason for contest
▪ District-level changes	Candidates:	▪ Spending
	▪ Decision to run	▪ Turnout
Regulatory Reforms:	▪ Campaign framing	▪ Competitiveness
▪ Campaign regulation		
	Voters:	
Technological Developments:	▪ Participation	
▪ Internet fundraising	▪ Motivation	
▪ Evolution of media ecology		

In short, the transformation of the dynamics of congressional primaries shown in the previous chapter reflects the changing incentives for actors during the nomination process.

[130] (Murakami 2008, 918)
[131] Given the distinct trends noted in the previous chapter between candidate and voter level changes, voters' responses to these societal trends do not appear to be as large as among elites such as parties or candidates.

Understanding changes in primary elections through these incentives helps make the sources of partisan asymmetries more visible. Though the parties are operating in a similar environment, both the structural pressures and actors' responses to these pressures have been asymmetrical during this period. In the later chapters, I examine whether these changes have resulted in non-centrist nominees, but the objective of this chapter is to understand why the phenomenon of primary transformation has taken place.

The first group of structural changes shown in Table 5.1 are grouped under the heading of electoral incentives. Changing electoral incentives at the *inter*-party (partisan) level have consequences for parties, candidates, and voters during the nomination process. If parties perceive that a general election will be close, they may be more inclined to intervene during the nomination to ensure an 'electable' candidate. Similarly, if (potential) candidates view the alternative party as ideologically distant, or are more hostile to them on affective grounds, they may be more inclined to run for Congress or to alter how these candidates frame their primary campaign. For voters, partisan polarization may also make them more likely to participate during the nomination process, perceiving greater need for political activity as they become more attuned to differences between the parties. In these ways, trends of partisan identification, negative partisanship, close national elections, and district-level changes have consequences for actors during the nomination process.

Regulatory reforms of the legal frameworks governing election campaigns may similarly influence the behavior of parties, candidates, and voters alike. Changes to campaign regulation are also felt in intra-party elections, shifting the balance of power among groups in the party network by altering the ways in which they can contribute to candidates, and, by extension, shaping voter choices. Finally, technological developments—including the shift to online fundraising and the fragmentation of the media ecosystem—have further dispersed power throughout the party network. In doing so, these changes have made it easier for candidates to run for office and given voters new avenues of information in primary elections.

Given that elite polarization has been asymmetric during this period (Lewis et al. 2021), I consider the distinct partisan impact of these changes and actors' responses throughout this chapter, demonstrating how the changing features of the political environment have reinforced radicalization in the Republican Party to a greater extent than in the Democratic Party. Before concluding, I discuss the role of nationalization, present in all three structural sources of change and potentially further influencing actors' responses in primary elections.

This chapter addresses the question of why the trends of primary transformation observed in chapter four occurred, considering how broader changes in U.S. politics and society have contributed to the changing dynamics of primary competition. In doing so, I demonstrate how forces outside the realm of legislative candidate nomination have altered the incentives for and behavior of the key actors in congressional primaries. I proceed by looking at the contribution of the different structural changes shown on the left column of Table 5.1.

5.1 Structural Changes

Table 5.1 groups sources of change into three distinct categories that have had consequences for congressional nomination. Electoral incentives reflect how the changing inter-party dynamics of electoral competition resonate in intra-party nomination contests. Regulatory reforms assess the importance of changes to the legal framework—commonly relating to the financing of campaigns—in the intra-party sphere. Finally, technological developments have influenced both the financing and informational coverage of congressional primaries. I examine each group in turn.

5.1.1 Electoral Incentives

Incentives in intra-party elections have altered due to a prolonged period of growing inter-party polarization and ideological sorting, fueled in part by negative out-party affect. These electoral incentives have been exacerbated by the keenly contested nature of and close outcomes in national elections, increasing the stakes each election cycle as both parties are potentially able to gain control of the institutions of government. Though the national environment has become more keenly contested, individual congressional districts and states have become more consistently partisan, increasing the importance of the favored party's primary as the site of genuine electoral competition. These changes have not impacted the two parties equally, and the asymmetry in incentives has distinct repercussions for parties' intra-party competition.

5.1.1.1 Increased Partisan Identification

Higher levels of party identification among voters (Bafumi and Shapiro 2009) impacts competition in primaries, as voters are more likely to retain the partisan allegiance between the primary and general election due to stronger positive feelings towards 'their' party. In recent elections, voters now hold some level of attachment to one of the major parties (Abramowitz and Webster 2018), and partisans have become more satisfied with their own party (Pyeatt 2015). Under the premises of spatial voting theories (e.g., Downs 1957a), greater

ideological distance between parties at an elite level means that each party has more ideological space to debate preferences internally and potentially occupy without concern that large sections of their voters will abandon them. In other words, high polarization and few parties make intra-party conflict more likely by increasing "the available room for intra-party conflict about ideological issues" (Basedau and Köllner 2005, 18). Theoretical literature also demonstrates that when voters perceive greater distance between the two parties, they will be more inclined to nominate candidates aligned to their party's realigner faction, perceiving less need to moderate or vote tactically (Coleman 1971).

Greater distance between the parties also has implications for candidates in primaries, since, given the lack of compromise with members of the alternative party, co-partisans with different positions have more incentives to compromise and cooperate (Burgin and Bereznyak 2013, 211). When large ideological distance between partisan elites combines with elevated levels of party-oriented voting in general elections, members of realigner factions have additional incentives to run for office. This combination of forces give these candidates "a large prospect of rallying both party factions in the general election" (Buisseret and Weelden 2020, 357), with partisan identifiers among the electorate especially unlikely to support an ideologically distant alternative party candidate in the November election. From the parties' perspective, the increased salience of partisan identity among voters has not been accompanied by a strengthening of organizational structures, as discussed in greater detail below, producing a period of "weak parties and strong partisanship" (Azari 2016). This combination enables outsider candidates who would not be selected by the formal party organizations to enter and win nomination contests, and then reap the associated benefits of the partisan label in general elections.

Partisan group identity has also become a more potent electoral force (Mason 2018), changing the incentives for primary voters, who continue to support their party in the general election regardless of the nomination outcome because they now "care less about what individual represents them and more about which party controls Congress" (Abramowitz and Webster 2016, 130). Because voters are less motivated by connection to individual candidates, parties can have robust internal debates during primaries without factional campaigns turning negative or damaging party prospects in general elections. Voters increasingly hold allegiances to groups rather than people, meaning candidates in primaries actively attempt to position themselves as representative of a sub-group within the party, either ideologically or demographically. In this group-centered era, ideological factions can serve as coherent sub-

party groups, with which candidates can associate to attract resources from other co-factional candidates and groups. These factions also serve as a label with which voters can identify.

In this highly partisan era, general elections have become dominated by partisan affect with less focus on differences in policy positions between the parties (Iyengar, Sood, and Lelkes 2012; Mason 2018). Increasingly affect-dominated general election campaigns mean substantive policy debates have often moved into the intra-party sphere (see also Abramowitz 2014b). The migration of policy debate has been facilitated by the features of the U.S. electoral system—where winner-take-all single-member districts provide a challenging environment for third parties—and the porous nature of the major parties.

This trend has been exacerbated by elite inter-party competition—both during and between elections—increasingly being structured along ideological lines, which has consequences for notions of political competition more generally. Because political conflict is increasingly understood by elites and voters as operating along an ideological continuum, intra-party competition is also framed and perceived by political actors and voters along the same dimension. Or, as Boatright puts it, "heightened ideological conflict within Congress breeds ideological conflict in primary elections as well" (2013, 14).

5.1.1.2 Negative Partisanship

Alongside higher levels of positive partisan identification, increased dislike of the opposition affects primaries as partisans in the electorate will be less likely to switch allegiance or fail to vote in the general election regardless of the nomination outcome. Greater dislike of the alternative party among the electorate—"negative partisanship" (Abramowitz and Webster 2016, 2018)—is evident in voters' declining assessment (American National Election Studies 2016) and perceived ideological distance from the alternative party (Drutman, Galston, and Lindberg 2018). A partisan electorate who increasingly dislike the alternative party have been presented with highly polarized choices, resulting in greater stability of voting (Fiorina 2017) and a decline in swing voters in general elections (Smidt 2017). Voting between primary and general elections has also become more stable, with partisan supporters having more reason to turn out in the primary and being increasingly unlikely to stay home or vote for the alternative party on election day. Parties have become less likely to lose—even non-primary voting—partisans to the alternative party, regardless of the outcome of the nomination process.

Increased out-party animus therefore means that voters who participate in congressional primaries are more likely to remain loyal to their party in November regardless of the candidate nominated. Even if their preferred candidate does not become the nominee,

primary voters will still turn out for the party in the general election because their assessment of the alternative party is significantly worse, and because allegiance to their candidate was rooted in policy or factional alignment rather than personal connection. Greater ideological distance between parties—both in reality and as perceived by partisan identifiers—means that the outcome of the primary in factional terms is unlikely to dissuade voters from continuing to support the party in the general election.

Candidates and parties are also aware that a keenly contested and internally divisive intra-party battle for the nomination is unlikely to have much negative impact on voter decisions come November. Because partisan voters are now highly unlikely to vote for the alternative party or even stay home for the general election, groups in the party network and the candidates themselves feel emboldened to contest nominations with minimal fear of general election reprisals. Evidence from presidential primaries (Masket 2020, 57) further indicates that partisans have become more willing to abandon other priorities to win general elections when parties are polarized, with negative partisanship serving as a stronger coordinating and mobilizing force once the nominee is chosen.

5.1.1.3 Close National Elections

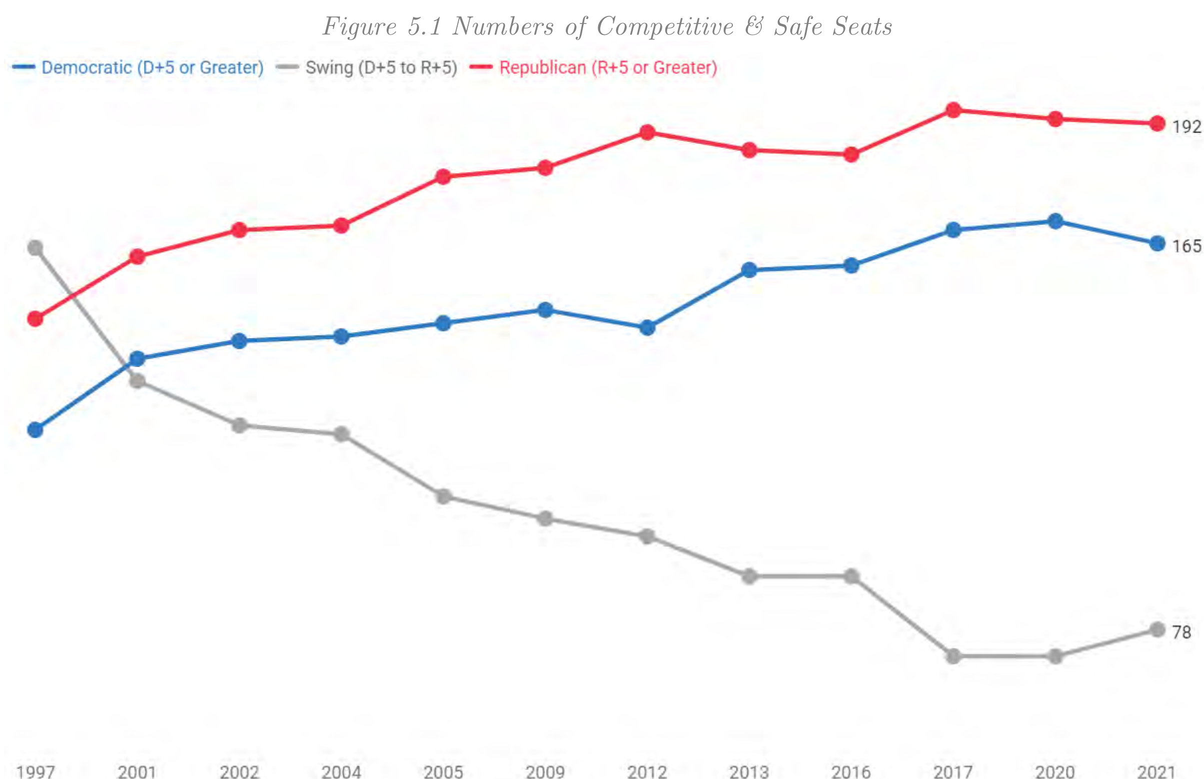
Nationally elected institutions have been experiencing "an era of tenuous majorities" (Fiorina 2017, chap. 1), with close elections in every cycle since 1992. These highly competitive national elections have resulted in frequent changes in the partisan control of the country's political institutions, which may be captured by either party each cycle. Consequently, primaries have become less concerned with individual or local battles and have instead become arenas of debate between loyal partisans which have often nationalized (see 5.3 below).

Close national elections serve as a further coordinating and mobilizing force after the primary election concludes, as even a small drop in turnout in the general election may have dramatic effects. As a result, candidates have become more willing to "sublimate their own personal ideological and programmatic goals to the common agenda" (Lee 2009, 46) out of a fear of negative partisan electoral consequences. That candidates know they may need to cooperate with and support their opponent after the primary incentivizes them to focus on policy and positional differences which can be reconciled after the primary in a way that hostile personal rhetoric and criticism on competence grounds cannot. This post-primary incentive therefore influences the behavior of candidates during the nomination process.

5.1.1.4 District-Level Changes

Whereas national elections have been highly competitive, races in individual congressional districts have become safer, with more districts diverging from the national vote share (see Figure 5.1). The drivers of district-level changes are contested, with scholars advocating a process of geographic sorting (Bishop and Cushing 2008; but see Abrams and Fiorina 2012), the redistricting process (Monmonier 2001), or the stacking of cleavages (Pierson and Schickler 2020, 54) as the main causal mechanism. In Downsian (1957a) terms, as districts and states have become less competitive, the ideological positions of districts' median voters have become less congruent with the national median, shifting incentives for both parties during the nomination process. In districts that are far from the national average, the median voter is not a swing voter but a consistent partisan. The partisan identity of the median voter has particularly important consequences during the nomination.

Figure 5.1 Numbers of Competitive & Safe Seats



Source: Wasserman and Flinn (2021)

Partisan districts consistently return one party to Congress, making the primary the only site of democratic accountability and prompting further attention from affiliated groups, media, and voters. Incentives for candidates to run in these districts is higher, as they know that they need only win the nomination and be assured of victory in the general election by virtue of their party affiliation. For formal party organizations primarily concerned with winning power, safe seats offer limited incentives for engagement during the nomination process as the party will win the district regardless of the candidate selected and so directing

resources to these districts is not perceived as strategic. In contrast, safe seats are an ideal target for policy-oriented actors during the nomination; partisan interest groups and activists know that if they can nominate a candidate aligned with their goals they will almost certainly advance to Congress, with limited risk of harming their preferred party's fortunes regardless of the nomination outcome. In other words, safe districts decrease the incentive for organizations concerned with outcomes in partisan or electability terms but increase the incentives for those concerned with policy outcomes. As a result, these nominations become less focused on candidate valence and instead are structured around policies and positions within the party tent.

Though district partisanship appears the strongest factor reshaping primary competitions, districts have also gotten more populous in recent decades, likely further contributing to the declining value of personal connections with constituents. Larger congressional districts may further decrease the importance of representatives' personal connection with constituents—and the associated framing as ambassadors for the district—that was deemed so vital in seminal accounts from the 1970s (Fenno 1978; Mayhew 1974). Given the increases in primary turnout, the personal connection between legislators and their "primary constituencies" (Fenno 1978) has likely become particularly distant during the period analyzed here.

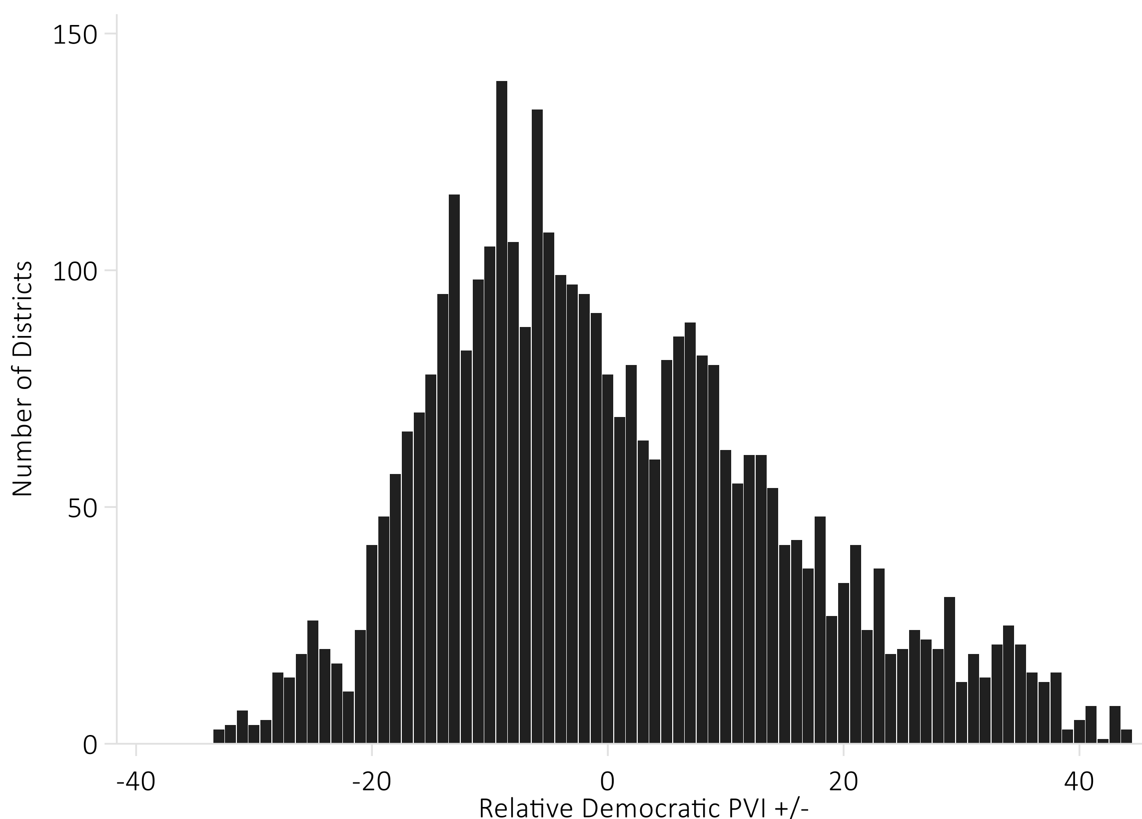
5.1.1.5 Partisan Asymmetry

These electoral incentives affect the two parties differently and have fostered asymmetric responses. The rural bias in both the Senate and Electoral College means that the Republican Party needs substantially less than fifty percent of the vote to win majorities in these institutions. Republicans also hold an advantage in the House because of the inefficient clustering of Democratic voters in urban areas and the recent success of Republican-controlled state legislatures in producing gerrymandered maps. Consequently, Democratic Party networks, candidates, and voters have stronger incentives to cooperate with members of the opposing faction—or, at the very least, not be openly hostile to their presence—to help the party in general elections. Conversely, Republicans, particularly those aligned with the reactionary faction, perceive less need to cooperate or moderate given their inbuilt advantages both in individual districts and in terms of control of nationally elected institutions. Higher penalties for Democratic non-cooperation have been identified in presidential primaries, where "Democrats may be a more functional party because they have to be. They recognize that the risks of them failing to coordinate are higher than they are for Republicans" (Masket 2020,

54). These partisan asymmetries are similarly present in the House and—even more so—in the Senate, where Democrats may simply have to be more accommodating of intra-party diversity to stand a chance of holding power.

Rural bias in nationally elected institutions also means that more Democrats than Republicans in Congress come from swing districts, in part because most districts that lean Democratic are only slightly (PVI between Even and D+10) favored for the party. In contrast, many more Republicans represent districts with a PVI between R+10 and R+20. Figure 5.2 shows the density of the Democratic partisan lean of all districts and states across the period of study.[132] The inefficiency of the Democratic voter coalition of converting votes into seats is further underscored by the greater numbers of districts that are heavily favored for the party (D+20 or more). As a result, Democratic members of Congress come from more heterogeneous districts in terms of their partisanship, meaning the party must be more willing to tolerate internal differences to preserve electoral status.

Figure 5.2 Democratic Partisan Lean of Districts & States



The Democratic voter coalition is also more demographically diverse and motivated by group interests (Grossmann and Hopkins 2016), likely furthering acceptance of different views among partisan elites and identifiers in the electorate. At the elite level, such acceptance

[132] With Democratic partisan lean coded as positive figures and Republican lean districts as negative.

appears embedded in party structures, with one representative being told, "Don't worry if you have to [vote against the party] because of your district. Do what you have to do" (moderate Democrat quoted in Thomsen 2017b, 46). Among voters at the end of the period of study, Democrats were asymmetrically willing to tolerate elite heterogeneity, with sixty percent agreeing that the party should be accepting of party elites who criticize Biden, compared to just thirty-three percent of Republican leaners willing to accept Republicans critical of Trump (Dunn 2021; Pew Research Center 2021). As a result, moderate Republicans in Congress "may experience greater levels of both formal and informal pressure than their Democratic counterparts" (Thomsen 2017b, 19). One such pressure comes in the emergence of same-party opponents in primaries, and a primary electorate more liable to punish moderation.[133] Intolerance of intra-party heterogeneity among Republican partisans may also make it harder for members of Congress to prevent a primary challenger from emerging out of fear of being perceived as inconsistent.

Factions within the parties also respond to these pressures in different ways, perhaps best understood using Blum's (2020) concepts of consociational and insurgent factions. Consociational factions hold a distinct position within the party's wide tent but are willing to work with the party organization to achieve shared goals and recognize that failure to do so will result in worse outcomes for both factions. In contrast, the main objective of an insurgent faction is taking over and reorienting the party apparatus, even at the expense of general election losses. I advocate that in primary elections throughout this period, we should consider progressives in the Democratic Party as consociational and reactionaries in the Republican Party as insurgent. One reason for this difference is the comparatively narrow electoral strength of progressives, whose voters are—even more so than the Democratic Party coalition as a whole—disproportionately clustered into urban districts. In contrast, the reactionary Republican coalition is more evenly spread across congressional districts in a manner conducive to exerting pressure on the party. These differences likely also reflect the Democratic Party's longer historical experience at managing intra-party factionalism (see chapter two).

A further important asymmetry between the parties' realigner factions is that progressives are comparatively inexperienced in party politics. As Blum (2020) documents, Tea Partiers often had long histories working within the Republican Party and tended to be

[133] Democratic incumbents who are successfully primaried tending to be less congruent with their districts then their Republican counterparts (Boatright 2013, 101), i.e., Republicans need only be a little more moderate than their district to be removed by a primary challenger away from the political center, whereas Democrats who leave office in this way tend to be considerably more out-of-line with their district's preferences.

older. In contrast, progressive activists have largely been politically socialized outside of the Democratic Party organization, either through anti-World Trade Organization (WTO) movements, the Occupy movement, or, more recently, the Sanders 2016 presidential campaign. These differences are not trivial, where experience of working in Republican Party politics appears to have helped reactionaries navigate the often-complex bureaucratic processes involved in nominating candidates. That progressives remain outsiders in the Democratic Party at the national level reflects their comparative inability or desire to take over the party in the manner of an insurgent faction.

In sum, changes in electoral incentives have had an asymmetric partisan effect on party networks, candidates, and voters in Democratic and Republican primary contests. Broadly speaking, these inter-party trends serve to incentivize cooperation among Democrats and lessen the consequences of failing to do so for Republicans. In congressional primaries, these incentives have emboldened reactionary Republicans, increasing the likelihood of candidates further to the right becoming the nominee.

5.1.2 Regulatory Reforms

In the first decades of the twenty-first century, campaign financing has undergone several iterations of reform. The effects of these reforms have had important implications in congressional primaries, raising the profile of factionally-aligned groups at the expense of the formal party network, suggesting a transfer of power from the formal to informal parts of the party network. Though these outside groups have undoubtably benefitted from changes in how campaigns are financed, the formal parties have fought back using financial mechanisms over which they retain control, contributing to an arms race of spending in intra-party contests.

The financial retaliation of the formal parts of the party network is an oft-overlooked aspect of the changing dynamics of congressional nomination. The evidence presented below indicates a more nuanced trend in primary campaign funding, with establishment forces rallying to offer greater support to incumbents and other comparative moderates in both parties. In this section I demonstrate that though outsider groups have been able to take advantage of campaign finance reforms in primaries, the responses by the formal parts of the party network mean that these intra-party cleavages have deepened. In this way, I contend that, rather than serving as a force pulling parties away from the center, regulatory reforms have instead reinforced the factional and ideological divisions within each of the parties. To do so, I analyze the relationship between candidates' factional orientations and their sources

of primary funding, looking at trends of individual and political action committee (PAC) donations to candidates during primaries in this period.

5.1.2.1 A New Era of Campaign Regulation

The past two decades have seen a plethora of laws and court decisions that have directly influenced congressional primary campaign funding. The general trend of these reforms has been to reduce the power of formal party organizations during the nomination process by moving money from insider to outsider groups. A link between changes to campaign financing and the strengthening of factional allegiances is also clear, as campaign finance regulation reforms passed largely *because* of factions within each of the major parties (La Raja 2008). In this process, factions within both parties had distinct incentives and so worked across the aisle to reorient the sources of campaign finance. As a result, many of the most noteworthy consequences of recent reforms to campaign finance are found *within* rather than between the parties, where candidates now have a more diverse pool from which to appeal for resources (Ballard, Hassell, and Heseltine 2020; Gimpel, Lee, and Pearson-Merkowitz 2008; Jacobson 2015).

The 2002 *Bipartisan Campaign Reform Act* (BCRA) prohibited soft money donations to national political parties and federal candidates, giving groups who could continue to accept soft money a structural advantage.[134] To mitigate for the loss of soft money, the BCRA doubled hard money limits from $1,000 to $2,000 and indexed this limit to inflation, the effect in primaries was to increase "the importance of groups that could bundle individual contributions" (Boatright 2013, 54). The BCRA introduced further reforms targeting primaries, prohibiting all soft money spending on communications in the thirty days before the primary, thereby weakening the ability of traditional party-aligned groups such as labor or corporations during this crucial period.[135] The net effect of the act in congressional primaries was to direct money away from formal party organizations by making it easier for outside groups to raise and spend money in primaries and harder for traditional party groups.

In response to the BCRA, huge numbers of 527 committees were formed to take advantage of their position as non-party groups that could legally raise and spend soft

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[134] The enactment of the BCRA was itself the result of divergent intra-party positions. Though most Republicans opposed the reform, and most Democrats supported it, the bill's passage through Congress highlights cross-cutting cleavages in both parties, with reform-minded Republicans such as Christopher Shays in the House and John McCain in the Senate working to ensure the bill became law. The strongest support for the bill on the Democratic side came from progressive elites, activists, and donors (La Raja 2008).

[135] This provision was deemed unconstitutional and struck down by the 2007 U.S. Supreme Court case *Federal Election Commission v. Wisconsin Right to Life, Inc.*, 551 U.S. 449 (2007). After this, issue ads were permitted in the thirty days prior to primaries but advertisements that advocated for or against a candidate remained prohibited.

money.[136] Money that was previously channeled through the formal party organizations was now going to 527s (R. Skinner, Masket, and Dulio 2013), resulting in a massive increase in spending by groups such as Club for Growth and MoveOn.org in the 2004 election cycle (Dwyre et al. 2007). The act was subsequently criticized for this influx of unregulated money into elections that followed (Jacobson and Carson 2016). These 527 committees became the focus of a variety of campaign activities and were conceived as fulfilling many of the roles of formal party organizations in both primary and general elections (Loomis and Schiller 2016). Though committees were often viewed as outside of the party, 527s with links to the formal parties served as hubs and are therefore better conceived as "well-placed participants in the party networks" (R. Skinner, Masket, and Dulio 2013). Perhaps most importantly for this thesis, the BCRA was instrumental in inducing intra-party fragmentation by offering new incentives for collaboration between candidates and affiliated outsider groups.

The *Citizens United v. Federal Election Commission*, 558 U.S. 310 (2010) Supreme Court decision went even further to undermine the financial benefits that the formal parties had previously enjoyed. The decision ruled that campaign finance was a form of free speech and therefore protected under the First Amendment, and that this protection extended to corporations and other organizations such as political action committees (PACs). The ruling in effect removed all restrictions on independent expenditures (IEs) from outside groups, overturning some sections of the BCRA.[137] *Citizens United* was first applied later that year in *SpeechNOW.org v. Federal Election Commission,* No. 08-5223 D.C. Cir. (2010) where the D.C. Circuit Court of Appeals ruled that individual contribution limits for IEs introduced in the 1971 Federal Election Campaign Act (FECA) violated the First Amendment. These court rulings resulted in the creation of 'Super PACs'[138] and 501(c)(4) groups, who could raise money from individuals, corporations, non-profits, and other organizations if they did not coordinate directly with candidates or parties, in effect creating a secondary network to finance candidates.[139] As with the 527 committees that preceded them, these groups remained tightly integrated into the extended party networks (Kolodny and Dwyre 2018).

Super PACs have been particularly influential in congressional primary elections. Factionally-affiliated organizations have gained influence in congressional primaries by using

[136] For reference, 527s are named after the IRS code for their tax-exempt status.
[137] The BCRA had previously been upheld by the *McConnell v. Federal Election Commission*, 540 U.S. 93 (2003) Supreme Court case.
[138] Formally titled 'independent expenditure-only political action committees'
[139] In practice these organizations frequently had connections to the official campaigns, as parodied by Stephen Colbert (Colbert Super PAC 2021).

these groups, which can spend an unlimited amount of money provided they do not work with candidates' campaigns. As a result, candidates with interest group PAC support have won congressional primaries far more frequently in the past decade (Manento 2019). In congressional primaries, these new resources were most often used by challengers to incumbents and other outsider candidates who were unlikely to receive support through the formal party apparatus (Boatright, Malbin, and Glavin 2016). In contrast, these rules continued to restrict the amount of financial support that formal party organizations could provide to candidates. Because campaign periods in congressional primaries have lengthened and risen in both profile and cost since *Citizens United*, the reforms have been particularly effective in driving candidates into the arms of organizations that can provide them with the financial support they require.

Citizens United also likely induced supply-side effects on campaign donations. Upon receiving the signal that their political contributions were a form of speech by the Supreme Court, organizations and corporations adapted their behavior and increased their donations and influence in both general and primary elections. The ability to make contributions without limits, combined with trends of societal politicization and employee and customer demands for corporate social responsibility, may have further contributed to a normative perception that corporations *should* be politically engaged.

Some studies find that donors in primary elections have become more ideologically extreme (Hill and Huber 2017), and that candidates have become more responsive to these donors during primaries as a result of these reforms (Kujala 2019). Other research suggests that donors' positions have remained static but that these reforms encouraged new patterns of donating, including more donations for ideological reasons (La Raja and Wiltse 2012). At the very least, donors to Super PACs and 501(c)(4) groups have different criteria for donating and different expectations than other donors in primary elections (Boatright, Malbin, and Glavin 2016). Responses to donor demands appears one likely mechanism driving the greater focus on issue positions in primary elections. Candidates perceive that taking clearer positions on issues in primaries will help them gain support from individuals and groups who share those positions, and groups providing support likely demand candidates talk extensively about the issues that they care about. In contrast, the formal party apparatus prioritizes electoral outcomes, making narratives about candidate valence and personal competence a more likely focus of primary elections.

To advocate that these changes have been purely advantageous for ideological outsiders is, however, to miss the nuance in these developments. Indeed, one notable trend since 2010 has been the proliferation of single-candidate Super PACs and IEs, most often in support of incumbents in primaries (Boatright, Malbin, and Glavin 2016). Candidates proximate to their parties' realigner factions have not been the sole beneficiaries of these developments, where organizations like the Chamber of Commerce intervened more in Republican primaries on behalf of establishment candidates from 2012 onwards, often successfully opposing reactionary candidates with Tea Party support (Kolodny and Dwyre 2018, 392). Since these major reforms, other regulatory changes such as the FY2015 Omnibus Appropriations Act have also helped the formal organizations by enabling parties to raise additional funds for 'non-political' organizational purposes.[140]

Regulatory changes do not appear to have sidelined the formal party organizations' control over their congressional nomination process (Hassell 2018) and have instead recast them as conductors of the financial activities of other actors in their network (Dwyre and Kolodny 2014). Despite the clear theoretical underpinning and empirical cross-country evidence that centripetal tendencies and the emergence of ideological outsiders are less common when the formal party organization controls access to finance (Basedau and Köllner 2005, 19), studies find no effect of the 2010 reforms on partisan polarization (Abdul-Razzak, Prato, and Wolton 2020). The non-effect of these reforms on inter-party ideological distance serves as further evidence of the more nuanced picture for intra-party power dynamics beyond the trend of control shifting from establishment insiders to ideological outsiders.

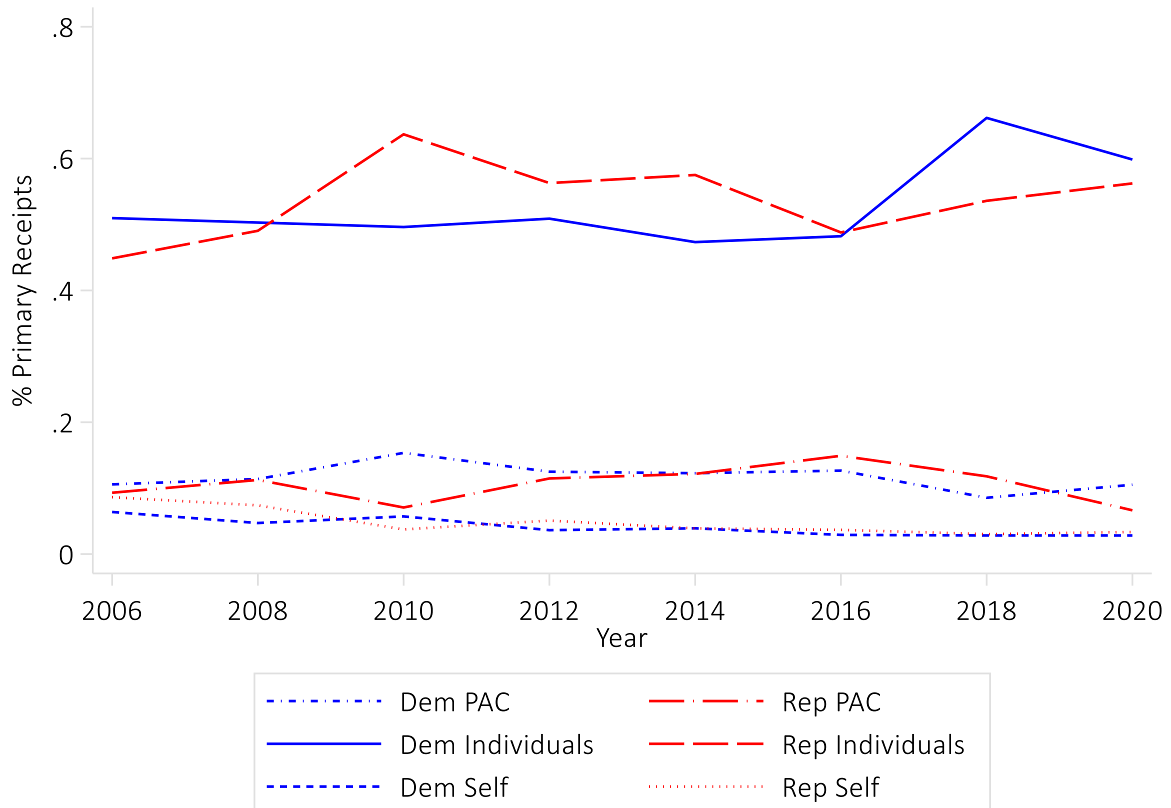
As with changing electoral incentives, regulatory reforms have affected the parties asymmetrically. The issue of campaign reform is barely present in Republican intra-party conflicts, with the party largely united in accepting the role of money in politics and taking a *laissez-faire* attitude to corporate influence. In contrast, progressives in the Democratic Party view corporate influence in elections as a key component currently undermining U.S. democracy, leading to demands for wholesale reforms in the wake of *Citizens United* and candidates refusing to take corporate Super PAC money in their campaigns. In terms of their partisan impact, the 2010 reforms are broadly understood to have benefitted the Republican Party due to the party's closer alignment with business interests (Abdul-Razzak, Prato, and Wolton 2020; Klumpp, Mialon, and Williams 2016).

[140] Including "supporting party conventions, providing for the acquisition and renting of buildings, and funding recount or other legal efforts" (Hassell 2018, 57).

5.1.2.2 PAC Funding and Realigner Faction Candidates

One way of analyzing the effect of regulatory reform at the intra-party level is by looking at descriptive trends of donations during this period and the relationships between candidates from parties' realigner factions and different fundraising sources. Figure 5.3 shows the sources of primary campaign finance as a percentage of the total money raised during this period, as per candidates' 12P FEC Reports. The split of funding sources between individual donations, PACs, and self-financing aligns with patterns shown in the previous chapter. In cycles with higher numbers of factional and ideological primaries, a greater proportion of finances came from individual contributions, with the most notable increases in the 'wave' election years of 2010 (Republicans) and 2018 (Democrats). PAC contributions have remained relatively stable as a proportion of primary campaign funding during this period, with some fluctuations in line with changes in individual contributions but no clear overall trend. In addition, a decline—albeit from a low starting point—in the percentage of funds coming from the candidates themselves drops to almost zero during this period.

Figure 5.3 Sources of Primary Receipts



These data indicate that higher proportions of PAC money raised in primaries do not align with the rise in ideological and factional primaries. Indeed, Figure 5.3 indicates that there may even be an association between individual contributions and these contests. To test the relationship between PAC money and candidates' factional alignment, I perform a logistic

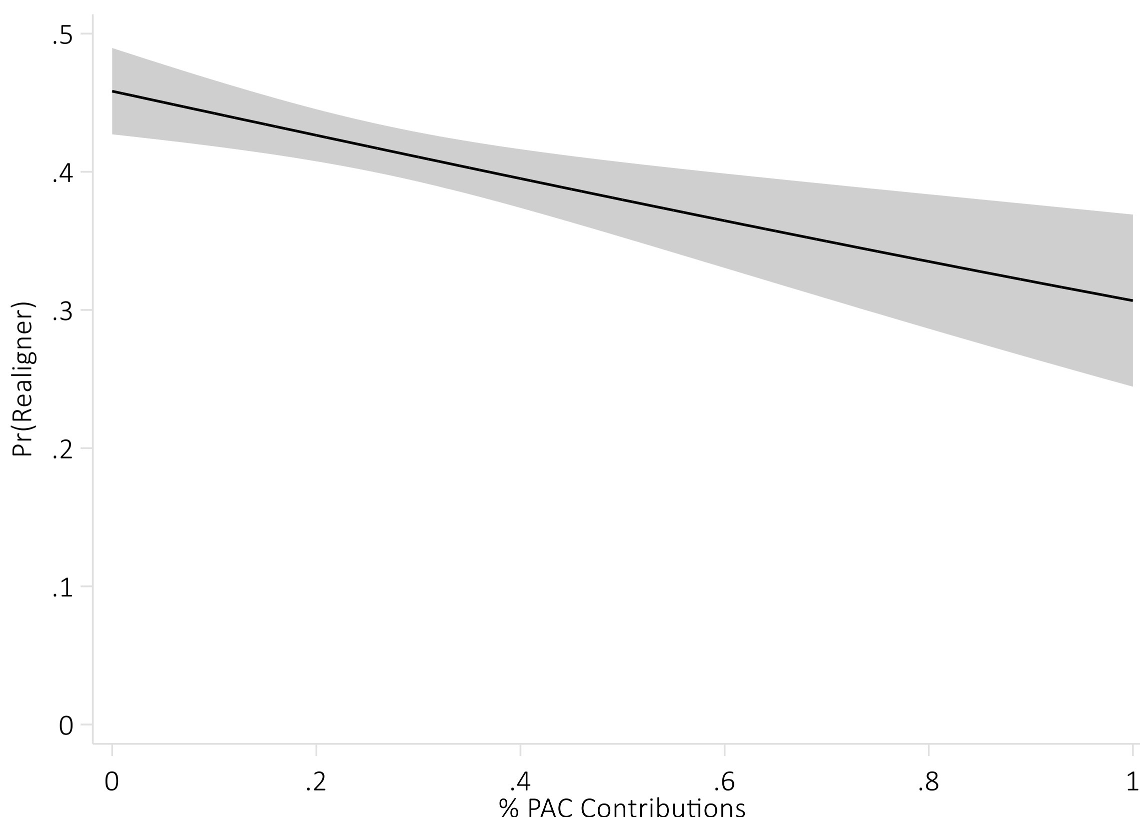
regression at the candidate level, with candidate alignment with their party's realigner faction (progressive Democrats or reactionary Republicans) as the dependent variable. The results presented in Table 5.2 demonstrate a clear negative association between the percentage of campaign contributions from PACs, both when restricted to candidates who received *any* money from PACs, and when applied to all candidates who raised money. These data indicate that, rather than driving extremism, PAC support is associated with proximity to parties' establishment factions.

Table 5.2 PAC Contributions & Realigner Faction Candidates

	Realigner Faction (nonzero PAC $)	Realigner Faction (all)
% PAC Contributions	–0.708***	–0.378**
	(0.218)	(0.182)
Observations	2,707	5,177

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

Figure 5.4 Predicted Probability of Realigner Faction Win (All)



As discussed above, the formal party organizations have mobilized in response to the regulatory reforms in the past two decades, and now much of the financial support given through PACs comes from party-aligned PACs such as the Senate Majority PAC and House Majority PAC for the Democratic Party and the Senate Leadership Fund and Americans for a Republican Majority PACs for the Republican Party. These PACs serve as the campaign

arms of the formal party organizations during the general elections but also contribute during primaries, commonly donating to incumbents or other 'electable' candidates in target seats. As shown in Figure 5.4, these candidates are less often aligned with the parties' realigner factions and when a higher rate of PAC contributions is made in a primary, realigner candidates are less likely to win.

As further validation of the results presented in Table 5.2, I construct an additional OLS model with CFscores as the dependent variable. The results, shown in Table 5.3, indicate that candidates who raise more of their primary campaign funds from PACs tend to be more moderate. In both parties, higher percentages of PAC contributions are associated with CFscores closer to zero: these variables are positively correlated in the Democratic Party, where candidates to the left have lower, negative CFscores; and negatively in the Republican Party, where farther-right candidates have higher, positive CFscores.

Table 5.3 PAC Contributions and Candidate CFscores

	Democratic CFscore	Republican CFscore
% PAC Contributions	0.270***	–0.211***
	(0.068)	(0.044)
Observations	1,137	1,179
R-squared	0.279	0.115

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

These findings provide nuance to the conventional wisdom that changes to the financing of primary election campaigns have elevated the power of outside groups at the expense of the formal party. Candidates in primaries who receive a higher percentage of their campaign funding through PACs tend to be more ideologically moderate and aligned with their party's regular faction. At the same time, and despite the scale of the reforms to campaign regulation, the percentage of primary campaign funds raised through PACs has not radically altered during this period. Though corporations and Super PACs are no longer restricted in the size of their campaign contributions, individual donations have kept pace and even increased their relative contributions. The higher level of individual donations has been made possible in no small part by recent technological developments.

5.1.3 Technological Developments

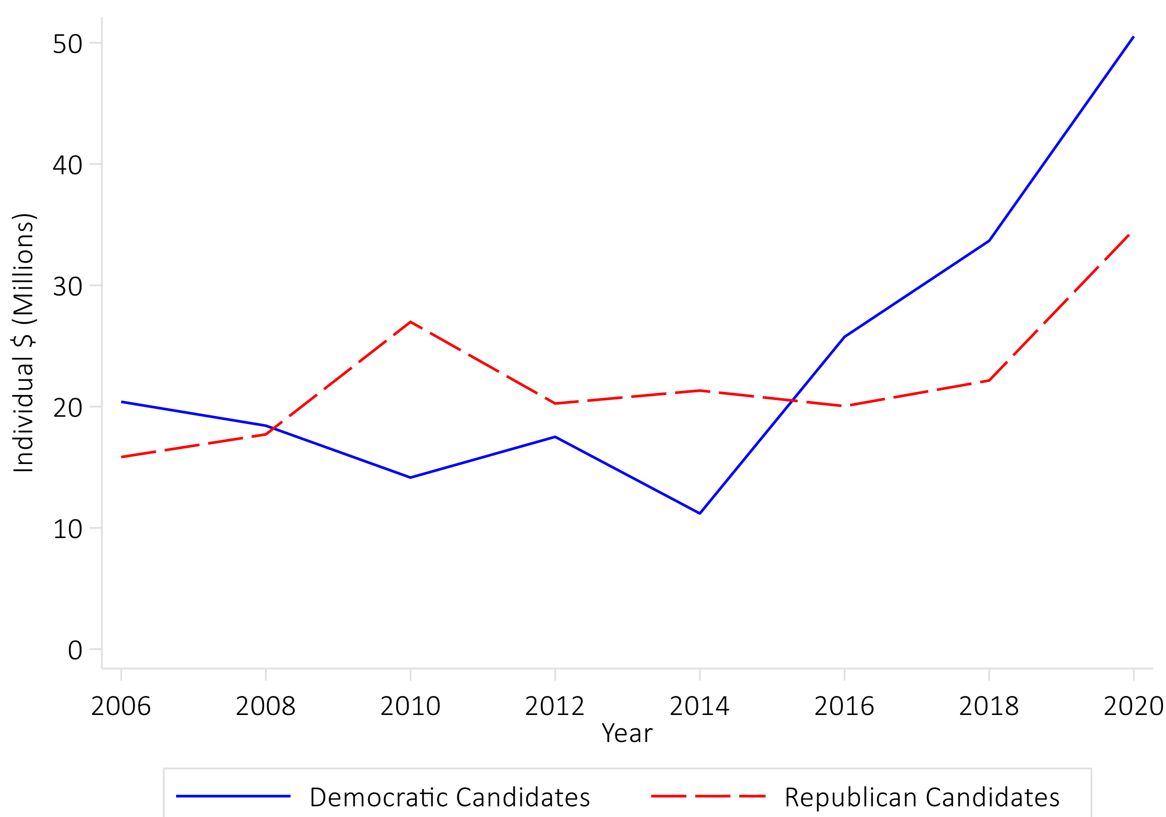
Technological developments have radically transformed the way U.S. election campaigns are conducted. Congressional campaigns now have a sizeable online presence, and internet fundraising has restructured whom candidates can appeal to for money, how people—especially

small donors—contribute, and facilitated a greater sharing of resources. At the same time, the fragmentation of media ecology means that voters now have an array of options to garner information about candidates, including from explicitly partisan sources. The proliferation of media outlets has offered a platform for greater diversity of candidates to communicate directly with potential donors and primary voters.

5.1.3.1 Internet Fundraising

In the past decade, total individual donations to congressional primary campaigns have soared (Figure 5.5). Technological developments have made it easier for individual contributors generally—and small donors particularly—to contribute, helping facilitate this change. New communication technology has moved fundraising online, enabling ordinary citizens to find out about and donate to primary candidates from across the country quickly and easily. These digital networks have enabled like-minded candidates and activists to share resources, ideas, and best practices without geographic restrictions.

Figure 5.5 Individual Contributions



The rise in individual contributions has largely been driven by small donors, categorized as those who give less than $200 to a campaign. Though small donors are widely spread across the political spectrum (La Raja and Wiltse 2012), they are less strategic in their giving and are far more likely to give to non-incumbents (Boatright 2013, 120). Even by 2006, small

individual donors were becoming more ideological, and ideological donations constituted an increasing proportion of total contributions (La Raja 2008). Despite these trends, small donors continue to hold positions more congruent with their district than large donors, and candidates who received higher shares of small donor money are ideologically indistinct from other candidates (Malbin 2013). When large donors donate they are, at least in part, engaging in rent-seeking behavior, with the hope that their donations are rewarded with favorable policy outcomes (Liebman and Reynolds 2006). In contrast, small donors appear to be donating less strategically to competitive primaries, or out of self-interest to candidates they think are highly likely to win, but instead out of ideological or policy agreement with them. Small-dollar spending is therefore a particularly inefficient way of fundraising, presenting parties with a coordination problem (Davis 2020; Hersh 2020). In primary elections, this problem manifests in the form of benefits to less 'electable' candidates, potentially making the party vulnerable in the November election. As a larger proportion of candidates' revenues now comes from individual donors (Figure 5.3), primary candidates may also be less likely to stick to homogenous party positions and instead become more responsive to their increasingly diverse donor base, serving as a further driver of ideological factionalism during the nomination process.

The formal party organizations have tried to assert influence over small donors by developing donation platforms. Platforms such as ActBlue (Democratic) and WinRed (Republican) have brought new donors and money into the political system (Albert and La Raja 2021). Citizens can use these platforms to donate to individual candidates, groups, or the parties themselves. These platforms can be considered part of the party infrastructure, giving formal parties some control over the flow of money from small donors to candidates, where 'the party decides' who can access this fundraising tool.[141] Despite controlling this infrastructure, parties have limited influence over when and where small donors give. Restricted in the size of donations, traditional party structures now play a more prominent role in endorsing and reassigning funds from safe to competitive races (West 2016, 25). Formal parties are also more efficient at spending and remain more successful than outside groups in congressional primaries (Conroy, Rakich, and Nguyen 2018). In primary elections, the growing power of small donors often serves to exacerbate intra-party cleavages between electability-focused candidates with the support of the formal party apparatus, and candidates who receive the support from individuals motivated by issue positions.

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[141] See, for example, the August 2021 removal of Representative Liz Cheney from WinRed.

As with many of these changes, technological developments relating to internet fundraising have not affected the parties equally. The Democratic Party has become far more reliant on small donors, to the extent that much research on the subject focuses exclusively on one party (Albert and La Raja 2020a; Arbour 2020). The Democratic Party's dependence on small donors is best understood as a continuation of a longer, pre-internet, history of reliance on a more diverse pool of donors, partly the result of an ideological commitment to having a broader base of financial support. Those on the ideological left have long bemoaned the influence of large donors and corporate money in politics, advocating the need for popular mass support to ensure connection between party elites and the voters they purport to represent. In contrast, Republicans' hands-off approach to the regulation of capitalism means they have long been more willing to align with companies to finance their political ambitions.

Different approaches from the parties can be seen clearly in their attitudes towards internet fundraising platform fundraising. The Democratic ActBlue platform went live in 2004 whereas Republicans' WinRed only launched in 2019,[142] indicating the greater reliance of Democratic candidates on small donors. A similar trend can be seen in the widescale adoption of internet fundraising among presidential candidates, with progressive Howard Dean's 2004 primary campaign and Barack Obama's 2008 primary and general campaigns the first to benefit from internet-focused fundraising strategies.

5.1.3.2 Evolution of Media Ecology

Media environments in the past decade have been defined by more fragmented network connections and increased volumes of information. These shifts have been described as a transition to a "high-choice media environment" (Van Aelst et al. 2017), producing new dynamics between parties, candidates, and (potential) voters by disrupting public spheres and political institutions (Bennett and Livingston 2018). Party and communication scholars have noted a trend of political parallelism where the content of niche news outlets aligns with existing partisan divisions (Levendusky 2013; Stroud 2010).

Elsewhere, I demonstrate that these trends are also present *within*—at least one of the—parties (Cowburn and Knüpfer 2022). Specifically, we find alignment between trends of intra-party factionalism and media fragmentation, showing that media engagement among Republicans in Congress aligns with other identifiable intra-party cleavages including voting behavior, caucus membership, and political rhetoric. The continued development of partisan

[142] Several disparate Republican platforms including Anedot and Give.GOP existed prior to WinRed.

media spheres, especially on the right of the political spectrum, and the expansion of ideological alternative media, have served as further sources of party fragmentation among elites such as candidates for Congress. Studies of presidential primaries also indicate that fragmented and partisan media outlets have reduced party insiders' ability to "communicate a single message to voters about which candidate to select in a primary" (Steger 2016).

The news media environment has not only fragmented but also expanded in terms of the volume of content being produced. New platforms, formats, and types of news media have proliferated alongside an expansion of traditional forms such as the advent of twenty-four-hour rolling news. Both amateur and professional news sources require interesting content to discuss during a primary season in which most contests see the incumbent or party-preferred candidate comfortably win the nomination (Hassell 2018). With faction-oriented groups desiring ever more coverage and news media sources having ever greater space to fill with content, the two sets of organizations are happy to fulfill each other's requirements. This development in particular lowers the cost of entry for potential primary voters who can more easily become informed about candidates, a task that in the pre-digital age may often have been a significant undertaking.

The rise of social media has further fragmented and reshaped the news media ecology. By offering political elites direct, unmediated access to their publics and enabling two-way communication, social media has assisted informal parts of the party network and given outsider candidates a larger voice. Social media have made it easier for elites to communicate preferences—such as endorsements in primary elections—directly to voters. By the end of the period of study, leading figures within the party were sending signals in intra-party fights directly to voters, such as Trump's widespread use of social media to endorse candidates in primary elections (Ballard, Hassell, and Heseltine 2020).

Media ecology on the right and left of the political spectrum has evolved in distinct ways. The emergence of Fox News in the 1990s created a conservative voice which was largely united in support for candidates on the Republican right, and often directly challenged more moderate members of the party. Donald Trump's candidacy and subsequent presidency was conceived as having a symbiotic relationship with the news channel (Benkler, Faris, and Roberts 2018; Yang and Bennett 2021). Other scholars have noted reactionary Republicans' open embrace of news media even further to the right, lending legitimacy to conspiracy theories and disinformation (Tollefson 2021).

Though partisan media on the left of the political spectrum exist (Allsides 2019; Media Cloud 2021), left-leaning media are not nearly so established nor closely connected to the Democratic Party institutions or candidates. This non-association is, in part, the result of a lack of perceived need for 'alternative media' on the left, since Democratic voters and elites have had a more amenable relationship with mainstream 'traditional' media sources even before the Trump era. In primary elections, the expansive far-right alternative news ecosystem may incentivize and advantage reactionary Republicans who receive favorable coverage from partisan outlets by being more openly hostile to establishment figures. In contrast, progressive Democratic candidates are unlikely to receive similar endorsements or alignment from media outlets that are widely consumed by primary voters. This asymmetry provides a further incentive for candidates on the right of the political spectrum both to enter primary contests and to criticize opponents on distinctly ideological grounds.

5.2 Responses by Actors

Having advocated that electoral, regulatory, and technological changes altered the incentives for actors in primaries, I next consider those actors' responses, analyzing party networks, candidate, and voter responses to the above changes in turn. As with the structural changes, I also consider asymmetric partisan responses.

5.2.1 Party Networks

Party organizations have evolved in response to the changes described in the previous section. Conceiving of parties as networks (Bawn et al. 2012) enables consideration of the role of a multitude of actors who are active in the party alongside the formal organizations. These actors include affiliated interest groups and activists who serve as part of the informal party organization. The evolution of parties into networks of policy demanders has important consequences in nominations, which have become sites of struggle for power between groups in the coalition over the direction and identity of the party. Specifically, the changes outlined in the previous sub-section have elicited changes both in parties' organizational structures and electoral strategies.

5.2.1.1 Organizational Structure

The changes identified in the previous section have served to make factional divisions within the parties' organizational structures more visible, with factionally-aligned outsider groups gaining influence. Most obviously, there has been greater coordination among members of the parties' realigner factions through informal party networks which have risen to prominence as

the formal parties have been "hollowed out" (Schlozman and Rosenfeld 2019) in a process of "movementization" (J. L. Cohen 2019). This organizational shift has been conceived of as contributing to polarization by offering a way for movement-aligned elites to connect with party activists outside of the formal party structures (Tarrow 2021). If intra-party alignments were merely "tendencies" (Rose 1964) in the past, they appear to have become more structured in the twenty-first century. Yet, at the same time, boundaries between the "traditional party organization" (Mayhew 1986) and the informal parts of the party network—including organized sub-groups, movements, interest groups, and even friendly media outlets—have become increasingly blurred. Perhaps nowhere more visibly so than during the nomination process.

Historically, interest groups and other policy-oriented organizations focused on advancing their issue preferences by "attempting to influence government rather than by nominating candidates" (Key 1942, 23). This behavior has changed, where regulatory reforms in particular have enhanced the ability of interest groups to influence nomination outcomes by supporting different candidates to the formal party organizations in primary elections (Manento 2019). Interest groups now target the nomination as a site of power, with a greater ability to mobilize and persuade voters, especially in low-turnout contests (Anzia 2011, 412). Whether interest groups disproportionately support ideological candidates remains debated. Some scholarship indicates that primary candidates in both parties who receive more interest group support do take less centrist positions (La Raja and Schaffner 2015; Manento 2019), yet other studies find that the increased numbers of these groups and decreased concentration of effort among them has resulted in a relative decrease in the power of factional outsiders in a more diffuse network of influence in both parties (Boatright, Malbin, and Glavin 2016).

Regardless of whether interest groups have contributed to increasing ideological distance between the parties, it appears undeniable that they have, at a minimum, become a source of partisan reinforcement, with outside groups who previously worked across the partisan divide becoming more consistent in their partisan allegiances (Pierson and Schickler 2020). In effect, outside incentives and sources of influence have shifted from being cross-cutting to reinforcing. In response to the entrance and increased power of outside groups, traditional party affiliates such as unions and business groups have sought more influence during the nomination process, further weakening the formal party organizations and diffusing the locus of power. In attempting to nominate candidates who pursue their agendas, these diverse groups now provide coordination to their party's sub-groups, identify candidates who

meet their policy agendas, give financial support, and serve as labels for voters to identify candidates.

Greater involvement of outside groups in congressional nominations also changes the motivations of candidates running. In a candidate-centered contest, winning the nomination is the only objective of the campaign, but once groups with policy agendas become involved, credibility becomes the most important dynamic (see also Boatright 2013, 221). Though these groups would prefer a nominee who shares their views and priorities, they are also using the nomination as a site to project power within the party. This objective can be achieved not only by victory but also by performing well or exceeding expectations. In incumbent races, a strong showing may mean winning a relatively small percentage of votes, where the goal is to ensure the incumbent pays attention to their issues and positions rather than loses their seat. Indeed, this may be one reason that—despite the other changes in primary dynamics identified in chapter four—contests became only somewhat more competitive over time and vote shares in ideological and factional primaries were no more fractionalized than in other nominations. In many cases, the goal may not be winning the nomination.

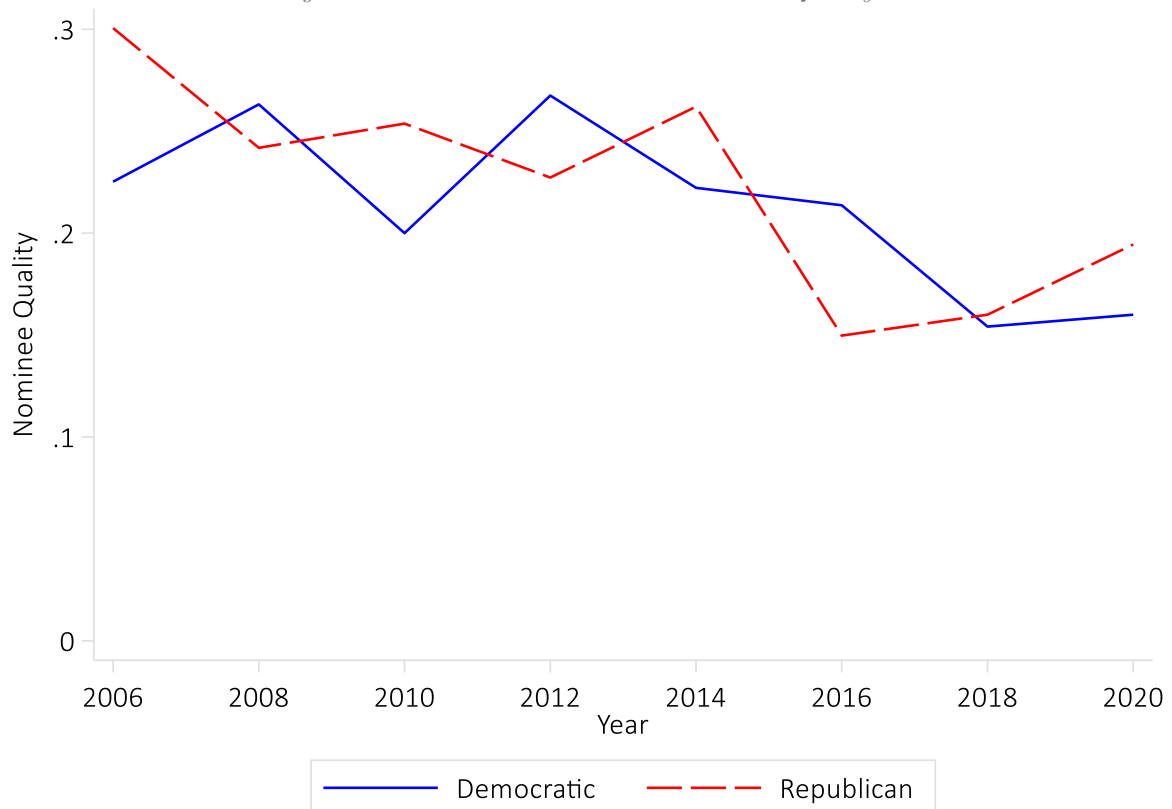
Though the involvement of outside interests has only made primaries slightly more competitive, their entrance into nomination contests appears to have affected outcomes in other ways. As outside groups and issue activists have gained power in the nomination process, the value of prior experience has declined. Issue groups and activists are less concerned with nominating a candidate with a record of accomplishment in elected office or public service and instead prefer candidates who share their positions and will prioritize their area of concern. Indeed, policy-oriented groups may even *prefer* amateurs who they perceive will be more reliant on their outside expertise to do their job. Success of amateur candidates is evident in the declining rates of (non-incumbent) party nominees who have previously held elected office, commonly considered as 'quality' candidates in the literature (Jacobson 1989).

Figure 5.6 shows a decline in quality candidates being nominated in both parties, with the decline in quality in the Democratic Party starting later than the Republican trend, in line with the trend of primary transformation shown in the previous chapter.[143] The greater success of amateurs in recent years appears to be a consequence of the emergence of new non-party networks that these candidates can rely on (Pierson and Schickler 2020). These "informal party

[143] 'Candidate quality' was personally hand-coded for all nominees using Project VoteSmart and personal biographies on candidate websites. In line with the established literature (Jacobson 1989; Jacobson and Kernell 1981; C. B. Meyer 2021a), candidates who had ever held public elected office were coded as quality, and those that had not were coded as amateurs (see also Cowburn 2022). Theoretical models indicate that quality candidates pursue more moderate policies (Hummel 2013).

organizations" (Masket 2009) have been emboldened by regulatory reforms and better able to coordinate their networks due to technological developments. Having done so, their relationships with their formal party organizations have been conditioned by the changing electoral incentives in general elections, with formal parties more amenable to incorporating these groups for potential partisan gain.

Figure 5.6 Non-Incumbent House Nominee Quality



The shift of organizational power towards outside groups has also elicited a response from the formal party apparatus. In response to decreased control over fundraising, formal parties now take a more active role during the nomination process by coordinating donors. The coordination role strongly influences the financial and non-financial decisions made by other actors in the extended party network, where party elites continue to shape the ideological profile of donors (La Raja and Wiltse 2012) and party support drives fundraising success rather than the other way around (Hassell 2018, 68). Close association with the formal party organization therefore remains a strategic priority for groups in the party network and for primary candidates for financial reasons.

Beyond their role as financial coordinators, formal parties have retained other organizational powers during the nomination process, one of the most widely acknowledged is the power of negative recruitment. Parties have a range of tools to pressure (potential) candidates that they do not favor to withdraw from the nomination pool. These pressures may be financial, such as cutting off access to out-of-state funding (see Hassell 2018, 158 for a case

study), but parties can also offer candidates alternative positions, threaten their current position, or otherwise hinder their future career trajectories. If candidates do not comply, they may ask notable figures or groups in the party to formally endorse their opponent. As discussed previously, these endorsements continue to serve as an indicator of viability to primary voters and are an important positive signal that parties can send.

Campaign staffing is another key resource that has remained at the disposal of the formal party organizations. Despite the dispersion of power in other areas, the prominent position of the formal organizations in the party networks means they have retained their links over staff (Nyhan and Montgomery 2015). Party organizations may therefore convince experienced staffers to work for preferred candidates and discourage them from working for candidates who they do not want to become the nominee. The increasing complexity of campaigns and the finite availability of resources have increased the power of the formal organizations in this area, where quality campaign staff are in high demand (see also Hassell 2018).

More broadly, formal party organizations have not sat idly by as changes have shifted power away from them. Rather, they have responded with "a redoubling of efforts...to maintain their role in campaigns" (Bernhard and Sulkin 2013, 146). This additional effort on the part of the formal party organizations, often facilitating intra-party conflict, furthers the development of factional and ideological primaries. As outside groups proximate to parties' realigner factions increase their attention on congressional nomination process, so formal parties respond in kind. This arms race approach to intra-party conflict has become particularly noticeable in primaries, drawing further resources and attention to the congressional nomination process as a site of competition.

Though these organizational responses have taken place in both parties, structural changes in the Republican and Democratic parties have evolved differently. Considered the more fragmented and disparate party in the pre-transformed era (La Raja 2008), the Democratic Party now appears the more organizationally cohesive of the two major parties. Partisan interest groups coordinate more frequently and substantively on the Democratic side (Manento 2019), as the party has "become more adept at ironing out internal differences" (Boatright, Moscardelli, and Vickery 2017, 26). Conversely, the Republican Party has struggled to maintain control over affiliated groups, particularly those on the right of the political spectrum. At its core, this structural asymmetry reflects the differences in the form of factional and ideological conflict.

Though divisions in both parties are both ideological and factional, Democratic Party divisions in congressional primaries tend to be operational, focused on policy agendas and issue positions, whereas Republican Party divisions are symbolic, focused on big-picture attachments to conservative ideology writ large. These intra-party divisions mirror those commonly conceived of in partisan terms, with the American electorate conceived as operationally liberal but symbolically conservative (Ellis and Stimson 2009). Democratic divisions over policy items may therefore be easier to find compromise on, whereas Republican divisions appear more emotionally driven, broader, and therefore more difficult to reconcile.

Greater ideological accommodations are also afforded to Democratic misfits in Congress, whereas moderate Republicans often have negative interactions with conservative co-partisans, ideological punishment of moderate Democrats is comparatively infrequent (Thomsen 2017b). In congressional primaries, these elite divisions emerge in patterns of candidate endorsements, where Democratic elites have become "notably more adept than Republicans at uniting behind candidates" (Manento 2019, 1). Democratic members of Congress often express less fear about ideological opposition in primaries than their Republican colleagues, with one senior Democrat responding to progressive threat by groups such as Justice Democrats by saying, "no one is afraid of those nerds. They don't have the ability to primary anyone." (Singman 2019).

One reason for greater confidence among establishment Democrats may be the limited ability of outside progressive groups to mount independent spending campaigns in primaries in the manner of ideological groups on the right. When analyzing the spending patterns of outside groups in the Democratic Party in 2018, Boatright and Albert (2021) conclude that Democratic congressional primaries did not follow the trend of enduring factional conflict established in the Republican Party when viewed from a financial perspective. Similarly, Kolodny and Dwyre (2018) show that MoveOn.org—perceived as one of the key organizations reorienting the Democratic Party leftwards—spent only $65,000 across fourteen House primaries in 2014. In contrast, organizations associated with the reactionary Republican faction, such as FreedomWorks, were highly engaged in spending against establishment Republicans during this election. Though the data in chapter four indicate that realigner candidates in Democratic primary contests framed their campaigns in a comparable way to their Republican counterparts, there appears little commonality in terms of financial organization. Instead, progressive organizations have focused on coordinating small dollar donors to campaigns directly and doing grassroots work (Cochrane 2019). This asymmetry

may further contribute to a more cohesive Democratic Party, with greater control over independent expenditures in congressional primaries.

Organizationally, the Republican factions have been engaged in a conflict over who controls the party apparatus for more than a decade. Tea Party activists emerged from within existing party structures and co-opted them for their cause, where gaining control of the candidate selection apparatus was an explicitly stated goal of the movement (Blum 2020, 43). One asymmetry between the two parties' realigner factions is how much success reactionaries have had at taking over the party organization, where "one reason Republicans appear more dysfunctional may simply be that they are overrun by ideologues" (Noel 2016, 186). In contrast, state and national Democratic parties' operations have largely remained under the control of the establishment faction. Indeed, whereas the Tea Party emerged from within local Republican operations, progressive groups such as Justice Democrats have frequently been criticized for failing to understand the political landscape in congressional districts due their national focus and organization (Weigel 2021).

5.2.1.2 Electoral Strategy

Asymmetries in organizational structures are intricately connected with distinct electoral strategies of the factions during the primary, and of the parties in general elections. The changes outlined above have incentivized parties to shift their general election campaign strategies, with important consequences for candidate nomination. In general elections, both parties have prioritized mobilizing their base and maximizing turnout rather than attempting to persuade (increasingly loyal) weakly-affiliated alternative party voters or (increasingly rare) truly independent swing voters. If mobilization is the key goal in a general election, the presence of an ideologically broad range of candidates during the primary may help foster connection from partisans along the ideological spectrum. Factional identification offers a potential way to ensure that voters feel represented enough to vote for the party in November. Because congressional primary voters frequently participate in partisan activities other than voting, offering this electorate the opportunity to vote for an ideologically proximate candidate in the primary may deliver further partisan benefits in November elections. Leveraging this advantage in general elections has taken on additional significance due to the closely fought national electoral arena described above.

Party organizations may also perceive those primary elections that are contested over ideological worldview, or between candidates with distinct policy positions, as being less damaging to their prospects in the general elections. Primary contests focused on candidates'

personal competencies and shortcomings give general election opponents an easy opportunity to repeat the attack in the general election. Conversely, if a candidate has faced a competitive primary in which their opponent attempted to outflank them ideologically on policy grounds, it is unlikely that a general election opponent from the opposing party will be able to use the same line of attack. Such an attack during the primary may even benefit the successful candidate in the general election by serving as a cue to voters that they are not a member of the party's realigner faction.[144] Non-ideological primaries may also be more likely to turn negative because candidates' personalities are the focus of the campaigns, since the level of negativity rather than competitiveness of nominations is harmful to the party's chances in the subsequent general election (Bernhardt and Ghosh 2020). As a result, formal party organizations may be less incentivized to prevent factional and ideological challenges, and so deploy strategies such as negative recruitment less frequently than in other primaries.[145]

Parties' organizational structures and internal dissemination of power also have implications for their engagement in primary elections (see also Hassell 2021). When power is concentrated in the formal party organization, parties will focus their finite resources on competitive districts, where the party may win or lose seats in the general election if they nominate a particularly strong or weak candidate. Conversely, when power is dispersed across the party network, then actors with discrete policy preferences are likely to engage in primaries across safe, competitive, and out-party districts. In safe and out-party districts the partisan outcome of the general election is already known, so the nomination process serves solely as a site of struggle for power between intra-party forces. In the case of safe districts, winning the nomination will almost certainly result in a representative in Congress aligned with policy demanders' priorities. In out-party districts, where the alternative party will win the general election, winning the nomination may simply serve as a signal of internal power within the party network. Competitive districts will likely see intense party engagement regardless of the internal distribution of power, given that the party has the most to gain or lose in these seats in the general election. Indeed, even if power is internally dispersed, we would expect the most cooperation between competing factions in these districts. That the number of competitive districts has declined (Figure 5.1) means there are fewer places where factions are electorally incentivized to cooperate during the primary.

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[144] An example at the presidential level can be seen in the failure of Donald Trump's attacks on Joe Biden as being a socialist to resonate with voters.

[145] Ideological and factional primaries are also where formal parties will likely face most backlash for trying to determine nomination outcomes.

Of course, these conditions are also highly dependent on the strategies of the party factions. Here we see perhaps the most visible manifestation of the differences between the parties. As discussed previously, reactionary Republicans are best conceived as an insurgent faction, identifiable through the adoption of approaches such as "procedural radicalism" (Blum 2020, 9). The reactionary Republican faction has been willing to torpedo the party's chances in a general election to win control of the local party apparatus and nominate a preferred candidate. Rather than cooperating with members of the establishment faction in districts where it made electoral sense to do so, this faction frequently managed to nominate its candidate to the party's detriment in the general election, including replacing 'quality' incumbents with weak outsiders (Blum 2020, 3).

In contrast, the consociational nature of progressives in the Democratic Party is evident in their more willing cooperation with the establishment faction. Progressives have consistently targeted and prioritized very safe Democratic districts, which are almost impossible for the party to lose in general elections (Weigel 2021). The progressive faction also appears to have more concern for the longevity of its movement, potentially with a view to longer term or generational party realignment, with the goal "to recruit a stable of candidates who might run again" (Boatright 2017, 16). Other studies show that outside groups in the Democratic Party rarely act against the party's interests (Kolodny and Dwyre 2018), likely due to the greater organizational cohesion between the party establishment and its realigner faction. Alternatively, it may be that progressive groups would choose an insurgent strategy if they could, but simply lack the internal power and numbers of reactionary Republicans. As stated previously, many of the asymmetric differences in electoral incentives between the parties are replicated within the Democratic Party, with progressives even more disproportionately clustered in urban areas than the broader party coalition. These constraints may mean that progressives simply have no alternative strategy but to operate as a consociational faction.

Constraints on progressives are further reinforced by the more active engagement of the party's establishment faction in primaries. Democratic elites endorse more primary candidates and coordinate to a greater extent than their Republican counterparts (Dominguez 2011). More broadly, the establishment faction of the Democratic Party has demonstrated a greater interest and ability in nominating preferred candidates (Boatright and Albert 2021). One potential explanation for this trend is that the Democratic Party learned from Republican Party failures to manage both the Tea Party and the outcome of the 2016 presidential nomination, identifying how a similar problem could emerge from their party coalition, and

actively taking steps to mitigate the threat from progressives.[146] I empirically demonstrate further evidence of this asymmetry in chapter seven.

5.2.2 Candidates

The changes described in the previous section have also had consequences for (potential) candidates in congressional primaries. Changing electoral incentives, new regulatory reforms, and technological developments have altered the motivations for candidates, shaping the profile of candidates who think that they can win in congressional primaries and so make the decision to run for office. These changes have also had consequences for those candidates who do choose to run by shaping the way they frame their candidacies in primaries. In short, the above changes have consequences for both *who* emerges as a primary candidate and *how* those that do participate in the nomination process.

5.2.2.1 Decision to Run

Though this thesis is primarily concerned with the dynamics of competition once candidates enter congressional primaries, the changes outlined in the above section have also affected patterns of candidate emergence. Thomsen's *Opting Out of Congress* (2017b) offers perhaps the most complete analysis to date of why moderate candidates have failed to emerge in both parties in recent years, using a 'party fit' argument to demonstrate that the benefits of running for office diminish for candidates nearer the political center. The shift in the ideological makeup of the candidate pool has clear consequences for the dynamics of congressional primaries. The non-entry of moderates—and especially the non-entry of conservative Democrats and liberal Republicans—means that the ideological and factional divisions that are present between the candidates are limited to one side of the ideological spectrum.

Though fewer moderates are becoming candidates, the overall numbers of candidates running for Congress increased between 2006 and 2020, as shown in Figure 5.7.[147] Increased numbers of candidates also relate to the changes identified earlier in this chapter. Changing electoral incentives mean that people see politics as increasingly important, giving them additional motivation to run for office (Abramowitz 2010). Regulatory reforms have engaged a broader set of organizations in the nomination process, meaning potential candidates have more options when attempting to build a network for financial and electoral support. Perhaps most importantly, technological developments have made it far easier to run for Congress.

[146] Indeed, the criticism from Bernie Sanders' supporters during and after the 2016 Democratic presidential primaries was that the party organization was being too active in the nomination process.

[147] These numbers include everyone who ran for Congress, either in a contested primary or unopposed for the party's nomination. Candidates who announced and then dropped out prior to a primary are excluded.

Congressional campaigns previously involved substantial amounts of travel, needing to meet people to win their support using traditional retail politics. In the digital era, much of this work can be done from home: candidates can gain media exposure to communicate their message via websites and digital platforms and raise finances through those same avenues. Many organizations have emerged in the past decade designed to encourage new candidates and coordinate training and knowledge exchange. Often, these organizations are factionally aligned and encourage certain types of candidates to run (e.g., Progressive Women's Voices), meaning publicly aligning with a faction during the nomination provides candidates with access to additional resources.

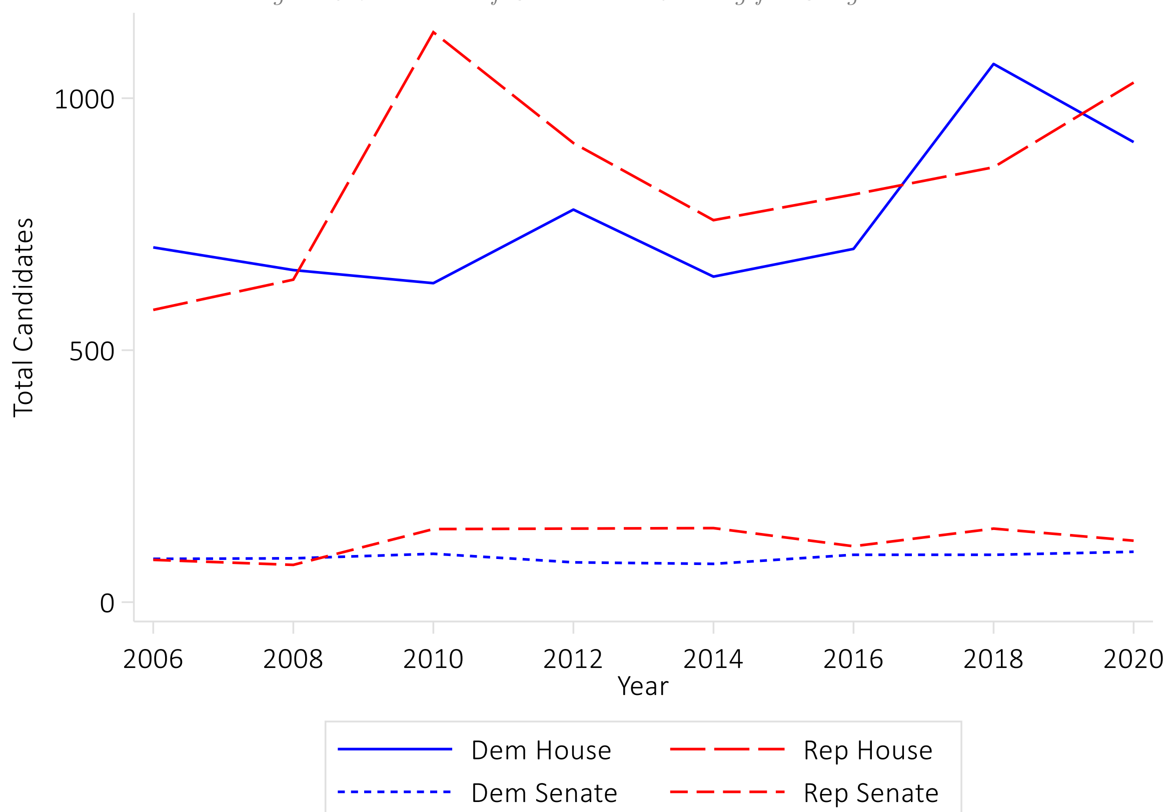
Increased media exposure may also alter the incentives to run, especially when winning the nomination may not be a candidate's only goal. Whereas unsuccessfully running in a congressional primary may have previously attracted scorn from the formal party organization and served as signal to voters that a candidate is not cut out for public office (in valence terms), primary campaigns now serve as opportunities for brand building by fostering connections with potentially supportive groups in the party network. A similar trend is also present in presidential primaries, which have boasted huge fields in recent years. Anecdotal evidence also intimates that running for office serves to raise candidates' profiles and boost name recognition.[148] In the modern era, a strong but unsuccessful primary run appears an effective way to land an alternative prestigious job within the party rather than ostracization. In short, losing a primary has transformed from being detrimental to candidates' careers into a mechanism for enhancing it.

The further rightward movement of the Republican Party likely produces further self-reinforcing factors that preclude moderates from entering primaries. Given this study's focus on the dynamics during the nomination, demonstrating an asymmetric pattern of candidate emergence is beyond the scope of this work. Figure 5.7 indicates that by the end of this period similar numbers of Republican and Democratic candidates were running for Congress, with fluctuations in numbers between 2018 and 2020 likely a response to perceptions of success in general elections in those years, indicating that the incentives for candidate entry discussed here are now somewhat similar at the partisan level. The consistently higher numbers of

[148] Former South Bend Mayor Pete Buttigieg is perhaps the most prominent example of this phenomenon at the presidential level. Following his victory in the 2020 Iowa caucuses, Buttigieg soon dropped out and endorsed Joe Biden prior to Super Tuesday. His decision to run boosted his profile within the party and increased his name recognition among voters should he wish to run again in the future. Buttigieg's next job was Secretary of Transportation for the Biden Administration, and he has been widely acknowledged as a rising star in the party.

Republican candidates running in Senate elections are likely the result of the party's partisan advantage due to the institution's rural bias.

Figure 5.7 Number of Candidates Running for Congress



5.2.2.2 Campaign Framing

Changing electoral incentives, regulatory reforms, and technological developments not only affect *whether* candidates emerge but also *how* they run for office. As presented in chapter four, candidates in congressional primaries most frequently framed their motivation for running as ideological by the end of the period. One limitation of these findings is that we are unable to distinguish whether a different type of candidate is running compared to the pre-transformed era, or if the same sorts of candidates are running but adopting different framing when doing so. What is clear is that candidates' narratives about their motivations for running in primary elections have changed. This may, in part, be a strategic decision on the part of candidates. If candidates perceive that adopting ideological framing will attract more attention from media outlets and policy-focused groups in the party network, then they may frame their candidacies as such for electoral benefit. Similarly, candidates may perceive that publicly aligning with a faction, particularly the opposite faction to their main opponent, is a smart political calculation, likely leading to electoral support and financial contributions from at least some quarters of the party organization and voter coalition. The data presented in chapter four are

therefore limited in their ability to explain *why* candidates are increasingly framing their campaigns as ideologically motivated, but a clear trend toward doing so is observed.

The trend of framing campaigns as ideological is present across candidates in both parties but several important partisan differences exist. In line with the partisan asymmetries noted elsewhere in this chapter, Republican candidates presented ideological differences as conflicts about overall worldview, rooting ideological differences in symbolic ideals rather than individual policy positions. Conversely, and as expected, Democratic candidates' ideological differences were most visible in the form of policy positions, especially around issues such as healthcare, where demands for Medicare for All were often both an indicator of alignment with the progressive faction and an ideological critique of an establishment opponent's policy preferences. Progressives were most often critical of establishment opponents for not pursuing ambitious enough policy goals and leveled this critique across multiple policy fields, including healthcare, economic redistribution, education, and the practice of democracy. In contrast, Republican criticisms of establishment candidates on ideological grounds were usually framed as explicit critiques of their non-adherence to a sufficiently conservative worldview, most often via the use of the term RINO (Republican in Name Only).[149] Additionally, candidates proximate to realigner factions framed their party's organizational apparatus in different ways, where anti-institutionalism was far more widespread among reactionary Republicans than progressive Democrats, in line with factional asymmetries in insurgent and consociational status.[150]

5.2.3 Voters

The changes identified in this chapter also relate to changing rates of participation and motivation for voting in congressional primary elections, in an analogous manner to candidate incentives about emergence and framing.[151] Voters' decisions to, and reasons for, participating in primaries may now be substantively different, both in response to the above changes and because of the responses by the candidates themselves and the party networks more broadly. Shifts in voter behavior are therefore best understood as changes in *whether* and *why* voters participate in primaries. As with many of the developments in this chapter, voter responses have evolved asymmetrically between the parties.

[149] Examples of use of the term DINO by progressives were rare—though not entirely absent—in these data.

[150] That is not to say that no progressive candidates adopted this framing, many expressed frustration and outright hostility to the DNC, especially in relation to the 2016 presidential nomination process.

[151] Though the trends in chapter four indicated that the dynamics most connected to voter response (turnout and competitiveness) changed less than those concerning parties and candidates, the behavior of voters in primaries may still have contributed to these trends.

5.2.3.1 Participation

Given the non-association between increased voter engagement and ideological and factional primary contests shown in the previous chapter (Table 4.4), it does not appear that changes in the dynamics of individual contests are strongly influencing voters' decision to participate in primary elections. In other words, the evidence presented in chapter four does not indicate a voter response to ideological and factional primaries in terms of participation in those contests. These data do, however, indicate that voter participation in congressional primary elections increased in line with a broader transformation of the dynamics of competition in both parties (Figure 4.13). This trend likely reflects a general uptick in public interest in politics, aligning with greater numbers of people participating in politics beyond voting in general elections, including donating time and money to political campaigns (Abramowitz 2010, 2018).

Voters now perceive politics as more consequential and of affecting aspects of life previously considered as being outside of politics (Abramowitz 2010). One reaction to this perception has been to increase their participation at the intra- as well as the inter-party level. As information about both politics and primaries has become more accessible, many new voters have chosen to engage at this stage of the political process, reversing decades of declining primary turnout (Boatright 2014; Hirano and Snyder 2019). At the presidential level, there is now greater attention on candidates even before primary contests begin, where the 'invisible primary' has become visible (Masket 2020; Paulson 2009). Though the invisible primary remains largely out of public view in congressional nominations, once candidates emerge, they receive greater attention in a high-information media environment. As a result, eligible members of the public can more easily inform themselves and are more likely to vote.

As shown in chapter four, increasing voter participation has not aligned with the dynamics of individual primary contests, but has risen in line with broader trends of transformation. Such alignment may therefore be a byproduct of a wider trend of nationalization of politics (see section 5.3 below). In the Democratic Party, though increased participation does not align with individual ideological and factional contests, once primaries transformed from 2016 onwards, the trend of declining participation reversed (Figure 4.13, previous chapter). The presence of, and national attention on, ideologically diverse candidates in *any* Democratic primaries may have prompted voters to participate locally, even if their district did not host an ideological or factional contest. The concurrent trends of transformation and engagement in the Democratic Party align with theorizing about its party

coalition as the less ideologically homogenous of the major parties (Grossmann and Hopkins 2016). When various groups in the broad tent identify viable primary candidates who share their policy preferences,[152] they mobilize supporters to participate. The more modest increases in voter turnout following transformation of Republican primaries in 2010 aligns with evidence that the party's voter coalition is more ideologically cohesive (Lelkes and Sniderman 2016). The trends shown in chapter four therefore suggest a demand-side partisan asymmetry, where different Democratic partisans are more engaged to vote when presented with candidates from across the left of the ideological spectrum in a way that Republicans are not, potentially due to the greater ideological and demographic homogeneity of the party's voter coalition (Grossmann and Hopkins 2016).

Partisan differences in voter participation also align with tactical differences on the part of the parties' realigner factions. The progressive faction of the Democratic Party has long championed itself as a people-driven movement and argued that mass participation is the necessary remedy to cure establishment dominance of the party. In contrast, from the Tea Party onwards, the reactionary Republican faction has been less focused on voter mobilization, and instead focused on wresting control of the party apparatus using insider knowledge and procedural expertise (Blum 2020).

The theoretical argument for transformation of voter participation is straightforward. Once nominations become framed in terms of ideological and factional differences, highly informed primary voters (Sides et al. 2020) versed in ideological nuance (Burden 2001) perceive greater difference between candidates and so are more likely to vote. Though theoretically sound, the comparatively muted reactions by voters in both parties to the more fundamental transformations at party network and candidate levels suggest that primary voters have not fully received these new signals from political actors. I explore the (non-)response to these changes in greater detail when I examine the selective effect from primary voters in chapter seven.

5.2.3.2 Motivation

Beyond determining *whether* members of the public participate in nomination contests, the changes outlined in this chapter may also affect *why* voters participate in primaries. Attributing reasons for voting is notoriously difficult, with voters themselves often not knowing

[152] Alternatively, these groups run a candidate from within their ranks.

why they make the decisions that they do. Unlike the participation question, it is therefore exceedingly complicated to quantify voters' motivations in primary elections.

Whether primary voters make choices based on candidates' policy preferences remains debated, with some observational studies finding that voters cannot distinguish distinct policy positions between same-party candidates in primaries (Ahler, Citrin, and Lenz 2016; Bawn et al. 2019; but see Kamarck, Podkul, and Zeppos 2016). However, recent experimental research indicates that primary voters do perceive and prioritize policy differences between same-party candidates, where "policies rather than demographics provide the clearest signals of ideological difference...driving candidate support among partisans" (Henderson et al. 2021, 30). Though debates about voter motivations in primaries continue, a positive association between the amount of information available and the extent of policy voting is clear (Hirano et al. 2015). When voters can easily learn about policy positions, they are more likely to use candidates' positions as their motivation for selection. Voters are also more likely to use policy positions as their decision-making criteria when there is greater positional difference between the candidates in a primary or when they perceive the nomination contest as important (Henderson et al. 2021). The trends of technological developments have produced a media environment where obtaining information about candidates' positions is far easier than in the recent past, and, as shown in chapter four, candidates more commonly frame their campaigns in terms of positional differences, meaning we should expect intra-party positioning to be increasingly salient for primary voters.

Intra-party positions based on policy preferences are far from the only criteria that voters use when making their decision, but name recognition, local interests, and personal characteristics of individual candidates have become less important to voters (D. J. Hopkins 2018) as party labels in general elections have become the dominant feature of partisan political competition (D. A. Hopkins 2017, 25). In intra-party elections, where party cues are absent, factional support and ideological positioning have become more important signals from candidates. Prior to the changes outlined in this chapter, voters without personal knowledge of a primary candidate had to invest considerable time and effort to research their policy positions. Candidates' factional labels and prominent positions on salient national issues have reduced these costs for voters. In short, if voters want to use intra-party positioning as their decision-making criteria for candidate selection, it is now far easier to do so.

Declining trust in the political system has further altered voters' motivations in primaries. Voters with a lower level of trust in the federal government were more likely to

support candidates proximate to their parties' realigner factions (Dyck, Pearson-Merkowitz, and Coates 2018). Democratic voters appear particularly likely to prefer outsiders when they have low levels of trust (Manento and Testa 2021). That declining trust in the political system aligns with new patterns of voting behavior indicates that low-trust voters are using different criteria when nominating.[153]

5.3 Nationalization

One further trend not depicted in Table 5.1 is the recent nationalization of U.S. politics, present across all three structural changes and actor responses. Nationalization has been identified in inter-party election contests, with increasing congruence between district-level House, Senate, and presidential voting (Jacobson and Carson 2016, 193). The nationalization of congressional primaries aligns with broader changes taking place in U.S. politics (D. J. Hopkins 2018), where regional intra-party differences, such as between northern and southern Democrats, have declined in recent years (Levendusky 2009; McCarty, Poole, and Rosenthal 2006). As a consequence, electoral choices and political behavior have nationalized, with the same assessment criteria now used by voters across the country in general elections and voters engaging with national issues at the expense of local politics (D. J. Hopkins 2018, chap. 3). Though research into nationalization has largely focused on general elections, national issues also attract greater attention in primaries. Discussing congressional general elections, Fiorina contends that "when elections are nationalized, people vote for the party, not the person" (2017, 127). In primaries, I contend that nationalized factions now provide coordinated policy platforms and have become coherent groups with which voters can identify. Because regional intra-party differences have declined but identifiable factions persist, internal conflict has become more prevalent within individual congressional districts.

Actors in the party networks have played a key role in this process, taking a strategic approach with the goal of nationalizing notable contests. Most primaries are relatively uncompetitive, meaning disproportionate national focus goes into a handful of races. Factional groups focus on these races, providing significant out-of-district funding and generating media attention, often involving high profile incumbents who appear vulnerable to challengers, or in open seats. National attention on 'interesting' primaries escalated in the mid-2000s and became widespread in 2010 when Tea Party groups challenged more moderate incumbents. Nationalization alters the dynamics of the primary by making the race about more than the

[153] Level of political trust even aligns with views of the primary process itself among Republican voters (Albert and La Raja 2020b).

seat in contention and turning the contest into a battle about party identity. Nationalization also incentivizes outside groups to support candidates who prioritize their issue(s), further serving to make the primary more policy focused. Boatright gives the example of incumbent Senator Blanche Lincoln, who noted in her 2010 contest, "there's just a lot of national groups that are using this race to make points" (2013, 27). The data presented in chapter four indicate a similar trend taking place in open and challenger primaries, where national exposure has given advocacy groups additional motivation to enter a primary. One measure of nationalization is the percentage of campaign contributions that cross state borders, in congressional general elections this figure more than doubled between 1990 and 2012, with a similar trend emerging later in primary elections (D. J. Hopkins 2018).[154]

Nationalization has also fostered greater involvement of national party figures in primaries, particularly in the support and coordination of same-faction candidates. Candidates are now endorsed by leading figures from their faction, with some endorsements requiring adherence to specific policies or campaign pledges. Similarly, same-faction primary campaigns are increasingly supporting each other across districts, such as Alexandria Ocasio-Cortez and Ayanna Pressley publicly promoting each other prior to their 2018 primaries. Ocasio-Cortez's 2018 primary victory made her a national political figure, and in the following months she undertook a national campaign, endorsing a slate of progressive candidates who signed up to specific policy pledges. A similar pattern began in the Republican Party in 2010 with notable figures endorsing challengers against incumbent members of Congress, such as Jim DeMint endorsing challenger Pat Toomey against Arlen Specter (Theriault 2013, 156).

How parties finance election campaigns has also nationalized, where transfers from national to state parties have declined post-BCRA (La Raja 2008). The numerous regulatory reforms in the twenty-first century have favored centralization of campaign financing by adding complexity and reducing transparency. Regulatory and technological changes have also contributed to a nationalization of the donor base, with a reallocation of donations to competitive districts across the country and donors coming disproportionately from a few wealthy districts (Gimpel, Lee, and Pearson-Merkowitz 2008, 374). Again, though these trends have largely been identified for general elections, a similar pattern has emerged during the nomination.

These trends mirror other ongoing processes of political nationalization, where changes to the media ecology have resulted in declining audiences for state and local news, prompting

[154] From thirty-one percent in 1990 to sixty-eight percent in 2012.

the closure or sale of many local news outlets (D. J. Hopkins 2018, chap. 9). These changes align with a broader homogenization of American society, with geographic distances absent in the digital sphere and greater similarity in the physical world, such as the increasing uniformity of main streets across the country.

Nationalization has consequences both on the demand side, in terms of how voters, partisan groups, and donors identify with candidates; and on the supply side, in the way candidates frame themselves. In a nationalized political environment, candidates are more likely to understand themselves as "surrogate" representatives (Mansbridge 2003), with connections to groups and voters outside of their geographic district. This development has been conceived as an evolution of the form of representation, "from one based exclusively on territory to one shaped by influences well beyond that territory" (Pedersen, Kjær, and Eliassen 2004, 373). In this model of representation, candidates are less responsive to the needs and preferences of their district, in part because their electoral and financial support extends beyond their constituency boundaries. During the primary, this model of representation is repeated, where candidates and their potential voters, activists, and groups within the wider party network are now less inclined to engage using valence factors or to frame themselves as ambassadors of their district. At the level of party competition, this shift has been conceived as a movement towards a 'teamsmanship' or parliamentary model, increasingly similar to competition in European democracies (Mann and Ornstein 2012). Though most notable at the level of partisan conflict, a similar trend has emerged at the sub-party level. Primary voters increasingly support candidates that share their views within the wide tent of the party out of shared policy agendas and positions. Within this, Thomsen's (2017b) concept of party fit indicates that moderate and misfit candidates who fail to align with partisan voters, activists, and groups in the party network are further disadvantaged compared to those seen as ideological outsiders, suggesting that *direction* of fit is crucial.

For voters, national factional labels have emerged as "party sub-brands" (Clarke 2020), signaling the type Republican or Democrat a candidate is. Increased levels of policy-oriented and positional conflict during primaries have also aligned with a comparative lack of meaningful policy debate in the inter-party sphere. Because levels of affective partisanship are now so high, parties make less effort to appeal to voters with policies but instead focus on maximizing support from their base with general election appeals connected to affective and negative partisanship. Consequently, policy debates have been pushed into the intra-party sphere, hashed out between competing interests within the party, after which disparate groups

coalesce for general election campaigns out of shared opposition, or even hostility, to the alternative party.

5.4 Discussion & Conclusion

The new dynamics of congressional nomination shown in the previous chapter reflect changes in the incentives for key actors in primary elections. Shifting electoral incentives, regulatory reforms and technological developments have elicited responses from party networks, primary candidates, and (to a lesser extent) voters in both parties during the congressional nomination process. The changes have been furthered by an ongoing process of nationalization, in line with wider societal trends, which call into question the model of representation in the nomination process and beyond. Many of these changes—such as the non-emergence of moderates or cross-pressured candidates meaning nominees are further from the political center—appear self-reinforcing and further the perception that moderates cannot win primary elections.

As elites have polarized, space has opened for diverse ideological positions within each party, resulting in policy-focused primaries. Robust intra-party contests focused on policy differences can now be undertaken with minimal concern that supporters will switch party due to greater ideological partisan distance, increased affective polarization, and elevated levels of negative partisanship. These changes have left the formal parties more susceptible to outside influence, changing the incentives for party organizations and candidates in primary elections and influencing voter behavior against the backdrop of a nationalization of politics. Fundamental changes to the way campaigns have been financed, the result of regulatory reforms and technological developments, have further this trend. At the same time, a transformed media ecology has afforded new opportunities to outside groups. Many of the relationships and changes observed here align with observations in the literature on presidential primaries, where a new landscape has "made it easier for factional candidates and outsiders to challenge elite control of nominations" (M. Cohen et al. 2016, 707).

Though some power over candidate selection has clearly shifted from the formal to the informal party groups, this chapter demonstrated that party officials have not been impotent bystanders as these changes have taken place. Party organizations have reasserted themselves in the nomination process, attempting to maximize leverage in areas that they continue to control. Party elites are now more active in endorsing and supporting preferred candidates, and the formal organizations play a crucial role both in reallocating and giving campaign funds, with evidence of clear alignment between moderation and PAC support. Formal parties continue to exercise power in diverse ways, including discouraging candidates through negative

recruitment, assigning experienced campaign staffers, and granting media access. Indeed, *the* key indicator of likely success in primary elections remains the support of the formal party organization (Hassell 2018).

The changes identified here have affected the parties differently, with far greater impact in the Republican Party. In particular, the rural biases in elected institutions have meant Republicans can pay less attention to concerns about 'electability' during the nomination process, emboldening the reactionary Republican faction. The right of the Republican Party has also taken a distinct strategic approach and been able to take over the organizational apparatus of the party in a manner which progressives on the left of the Democratic Party have not. At the same time, the media ecosystem has evolved in such a way that far-right networks now offer an alternative worldview to this faction's supporters, often entirely disconnected from mainstream narratives. Alternative media on the left of the political spectrum are far less powerful and organizationally disconnected from the Democratic Party apparatus. That is not to say that the structural changes observed in this chapter have not affected the Democratic Party, candidates, or primary voters. Internet fundraising has provided the party with an army of small dollar donors in primary elections, presenting the party with new opportunities and challenges. Changes in campaign regulations, especially the *Citizens' United* Supreme Court decision, have incentivized primary candidates in both parties to foster relationships outside of the formal party organizations.

The previous chapter demonstrated that primary competition in both parties transformed in the twenty-first century. This chapter argued that this transformation is the result of long-term structural changes that have had repercussions for congressional nomination. As a result, the increased levels of primary activity, dominated by ideological and factional differences, look set to continue in both parties for the near future. Factions now fulfill many of the roles of political parties during the nomination process, with ideological labels and distinct policy positions structuring competition. As parties have clarified what it means to be a Republican or Democrat in general elections, factions have defined ideological sub-groups within each, resulting in greater attention on intra-party positions and sub-party identity from groups in the party networks, candidates, and media. Ideological differences have become more coherent and coordinated and can therefore be understood as a form of intra-party polarization or fragmentation.

Chapter four analyzed the *what* of recent changes in congressional primary competition, demonstrating that contests transformed along several distinct dynamics. This chapter

considered the *why*, with the goal of better understanding the mechanisms driving the recent changes in primaries and proposing that structural changes have altered the incentives for key actors during the nomination process. Having done so, section three of this thesis turns to assess the *so what*. In this final section, I analyze how the changing dynamics of primaries—specifically, the proliferation of ideological and factional primaries—have affected the ideological position of nominees. Before testing the distinct mechanisms of how these primaries may therefore contribute to growing partisan polarization in chapters seven through nine, I start by analyzing whether factional primaries *can* reorient party elites by using a most-likely case study: reactionary Republicans in the Tea Party era.

Section Three: Primaries as Polarizing?

6 A Most-Likely Case: Factional Primaries in the Tea Party Era

The Republican Party would be very smart to absorb as much of the Tea Party movement as possible.

Sarah Palin[155]

For at least three election cycles between 2010 and 2014, Tea Party-aligned reactionary Republican candidates sought to oust establishment Republicans electorally (Blum 2020), Tea Party activist groups labeled incumbents they deemed insufficiently conservative as 'Republicans In Name Only' (RINOs)[156], and Tea Party caucuses fought with Republican Party leadership in Congress (Bloch Rubin 2017; Clarke 2020; DiSalvo 2012). This faction is commonly attributed for pushing the congressional Republican Party further to the right, and of reshaping both American conservatism and the Republican Party as an organization which facilitated the nomination and presidency of Donald Trump (Gervais and Morris 2018; Skocpol and Williamson 2012).[157] As shown in chapter four, this period saw a substantial uptick in the rate and number of ideological and factional primaries as reactionary candidates with Tea Party support ran for Congress against establishment opponents on explicitly ideological grounds.

Factional primaries during the Tea Party era are therefore the most visible and typical case where primaries may contribute to elite polarization. Although factionalism is rife within both parties, the effects of intra-party conflict in primaries have been present for longer on the right, as shown in chapter four. The rise of the Tea Party in 2009 marked the beginning of an insurgency within the Republican Party, wherein a faction characterized by its extremist views, anti-establishment posture, and scorched-earth tactics sought to take control of the Republican Party by any means necessary (Blum 2020). Even a casual observation of the Republican Party's trajectory from Trump's 2016 nomination onwards indicates that the reactionary Republican faction was largely successful in reorienting the party in Congress during this period. In other words, the reactionary Republican faction during the Tea Party era makes for

[155] Quoted in Johnson (2010).
[156] A term later adopted by Trump to signal Republicans he deemed insufficiently loyal.
[157] Parts of this chapter are drawn from Blum and Cowburn (2022).

the ideal case to study whether primaries can contribute to polarization both in terms of the faction's stated objectives and degree of success.[158]

In this chapter, I therefore test whether factional conflict in congressional primaries can reorient party elites in the most visible and typical case. I present evidence that pressure from the reactionary faction in primary elections caused Republican representatives to move further to the right. I save analysis of the distinct mechanisms through which primaries may contribute to polarization for the following chapters, meaning the object of interest in this chapter is *whether* rather than *how* factional primaries polarize.[159]

This chapter demonstrates that factional primaries *can* contribute to partisan polarization using a difference-in-differences (DiD) design. This finding runs counter to scholarship that contends that party homogenization and partisan polarization are aligned, indicating instead that factional strife can serve to pull (some) party elites toward an ideological pole. In this way, factions may exacerbate, rather than check, inter-party conflict. Competition in primary elections appears a central arena in which realigner factions can apply pressure to their host parties to move them away from the political center. The changing dynamics of congressional selection documented in chapter four—with more contested nominations and higher rates of ideological and factional primaries—may therefore be one way in which primaries have become more important in delivering polarized outcomes.

6.1 Expectations when Factions Engage in Primaries

Factions who want to influence parties must first contend with the sprawling landscape of state and local party organizations. Although these institutions vary by locality, they share a key function: they are responsible for recruiting and nominating candidates *who can win* (Broockman et al. 2021; Crowder-Meyer 2013; Hassell 2018; Masket 2009). Winning candidates are usually broadly acceptable to a majority of voters in a district, though in a hyper-partisan landscape populated by 'safe' districts, party leaders might look more favorably on the candidate preferred by the most vocal segment of their party. Either way, formal party actors are unlikely to support a realigner candidate unless a faction forces them to do so.

One way that realigner factions can challenge the formal party's preferred candidate is with a candidate of their own in a primary. The combination of minimal restrictions on candidate eligibility, the existence of decentralized selectorates, and low levels of voter turnout

[158] We might alternatively conceive of this success in terms of variation on the dependent variable, where asymmetric polarization has produced more change in the outcome among Republicans than Democrats (Lewis et al. 2021).
[159] I repeat this analysis using ideological primaries in the appendix.

and media attention in primaries make parties vulnerable to factional primary challenges (Dominguez 2011; Hazan and Rahat 2010; Kamarck 2014b; Manento 2019; Masket 2009; but see Hassell 2018), with increased numbers of factional and ideological primary contests shown in chapter four. This mechanism is a *top-down* process: factional candidates may make appeals to partisan supporters who then change their preferences to align with those of the faction, or, more likely, supporters held these positions beforehand but failed to identify that any of the candidates running for office shared them. This top-down process may also change the composition of the activist base, bringing new groups into the party along the way.

As discussed in chapter two, pressure from realigner factions could result in nominees further from the center in several, mutually reinforcing ways. First, the faction could gain control over the party organization in the district. If more ideological, realigner candidates replace comparatively moderate, establishment ones, the party may shift towards more hyper-partisan positions and candidates. Second, a party organization might respond to intra-party conflict by focusing on the one thing its members agree on: opposing the other party. Here, inter-party animosity could temporarily shield the party from electoral losses as it resolves its internal disputes. In this case, formerly moderate incumbents may act in a more polarized manner in an attempt to win reelection, i.e., positioning themselves further to the right both to reduce the threat from primary challenges from realigner candidates and to signal their opposition towards the other party to voters.[160]

This chapter therefore evaluates factional pressure from congressional primaries on Republican representatives' position. As discussed above, I limit my focus to Republican factional primaries in the three election cycles that the Tea Party were active in primaries, 2010 to 2014. This decision is informed by the trends of primary competition observed in chapter four and the greater success of the reactionary Republican faction in taking over the party apparatus discussed in chapter five. The rightward movement of the Republican Party in the Tea Party era therefore presents an ideal case for examining whether factional conflict in primary elections may exacerbate elite polarization, leading to one main hypothesis:

> **H1**: Republican representatives from districts with factional primaries will move further rightward in their roll-call voting (measured using Nokken-Poole ideal points) between the 111th and 115th congresses than Republican representatives from other districts.

[160] I test these mechanisms separately in later chapters of this thesis.

H1 Null: Factional primaries will not result in more extreme Republican legislative voting behavior.

Of course, I might fail to observe any systematic relationship between factional primaries and partisanship. Factional pressure could also result in a *decline* in polarization. Increased divisiveness within a party, especially at these lower levels, could enfeeble that party's ability to form a unified front or to participate in inter-party conflict. In this case, less coherent behavior from the party manifests in less constrained voting behavior among elites in Congress as expressed in the null hypothesis above.

This chapter also considers the possibility that parties may change for reasons bearing little relationship to factions. Rightward movement of Republican elites may be the result of underlying secular trends (Anderson, Butler, and Harbridge-Yong 2020; Arceneaux, Johnson, and Murphy 2012; Bishop and Cushing 2008; Canes-Wrone, Brady, and Cogan 2002; Druckman, Peterson, and Slothuus 2013; Prior 2013), institutional factors such as redistricting (Altman and McDonald 2015; Carson, Engstrom, and Roberts 2007), a generational replacement of moderates by comparatively extreme representatives (Theriault 2006), or a 'Trump effect', pulling representatives to the right following the election of Donald Trump. To address the possibility that rightward movement might be the result of something else, I balance the treatment and control districts using alternative explanations.

6.2 Identifying Whether Factional Primaries Polarize

The identification strategy leverages a canonical DiD design with a single treatment period (see e.g., Angrist and Pischke 2009; Imbens and Wooldridge 2009).[161] The treatment variable is operationalized as the presence of a factional Republican primary in a congressional district during the *treatment period*; 2010 to 2014. The *pre-treatment period* is the 111th Congress (immediately prior to the treatment) and the *post-treatment* period is the 115th Congress (immediately after the treatment).

[161] I am familiar with the recent DiD studies which include variation in treatment timing and dosage (e.g., Callaway, Goodman-Bacon, and Sant'Anna 2021; Callaway and Sant'Anna 2020; de Chaisemartin and D'Haultfœuille 2020; Goodman-Bacon 2021). This chapter uses a canonical DiD approach with a single treatment period meaning that these concerns largely do not apply. Though I use a two-step method, with propensity scores used for weighting in the models, I repeat the analysis using alternative estimators in the appendix.

6.2.1 Dataset

The data used here are the Republican subset of the main data introduced in chapter three restricted to the congresses after the 2006 to 2016 elections (109th to 115th Congress). An overview of the relevant variables for this chapter is shown in Table 6.1.

Table 6.1 Key Variables in this Analysis

Variable	**Values**	**Measurement periods**	**Time invariant**	**Source**
Outcome Variable				
Legislator Position	–1 (liberal) to +1 (conservative)	109th to 115th	No	Nokken-Poole scores
Treatment Variable				
Factional Primary	1 (at least one factional primary 2010 to 2014); 0 (no factional primary 2010 to 2014)	111th to 114th	Yes	Original Data
Variables for Propensity Score Estimation				
Percent White	0.026% to 96.6%	2006 to 2016	No	American Community Survey
Median Income	$23,773 to $129,821	2006 to 2016	No	American Community Survey
Median Age	21 to 55.7	2006 to 2016	No	American Community Survey
Rural–Urban	Pure rural (1); Rural-suburban mix (2); Sparse suburban (3); Dense suburban (4); Urban-suburban mix (5); Pure urban (6)	2002 to 2010; 2012 to 2020	No	CityLab Data

6.2.1.1 Outcome Variable: Legislator Position (Nokken-Poole Scores)

The outcome variable is operationalized using first dimension Nokken-Poole ideal points, introduced in chapter three. Nokken-Poole ideal points scale legislators from –1 to 1, where negative scores correspond with a more 'liberal' voting record, and positive scores correspond with more 'conservative' voting. This dynamic measure of representative position captures adaptation and replacement effects between the 111th (2009 to 2011) and 115th (2017 to 2019) congresses, the pre- and post-treatment periods.

6.2.1.2 Treatment Variable: Factionalism

The treatment variable is operationalized as the presence of a factional Republican primary in the district in the election cycle of 2010, 2012 or 2014. Districts where no factional Republican primary took place during this period are used as the control districts. Descriptive statistics for this variable are shown in chapter four.

6.2.1.3 Confounding Variables

I identify district-level variables that might act as "true confounders" (Austin 2011) which are used to estimate propensity scores: percent of voters who are White, and median household income, median age, and rural–urban population. These variables are exogenous to, but predictive of, both the treatment variable of factional primary competition (Walker 2011;

Willer, Feinberg, and Wetts 2016) and the outcome variables of elite ideological position (Jardina 2019; McCall and Manza 2011; Schildkraut 2019).[162] Data on district whiteness, median household income and median age are incorporated using one-year estimates from the American Community Survey (ACS). The measure of district density comes from the CityLab project (Montgomery 2022), with estimates aggregated per districting cycle (2002 to 2010; 2012 to 2020). I balance districts according to CityLab's fuzzy-c means clustered groups, ranging from: Pure rural (1), Rural-suburban mix (2), Sparse suburban (3), Dense suburban (4), Urban-suburban mix (5), Pure urban (6).

In sum, these confounding variables might offer alternative explanations for why a district might experience factionalism, and influence roll-call voting positions. Republican representatives from rural districts that are whiter with older populations and lower median incomes may be disproportionately likely to move further to the right regardless of the presence of factional primary contests. The goal of balancing the treatment and control districts on these characteristics is to nullify the potential influence of alternative explanatory factors other than primary factionalism in moving districts further to the right.

6.2.1.4 Redistricting

The timeframe in this analysis overlaps with a redistricting cycle. Following the 2010 census, states gained or lost congressional districts or shifted district boundaries. Because of this, measurements up to and including 2010 are based on the 2000 census district boundaries, and measurements from 2012 onwards are based on boundaries drawn using the 2010 census. To compare districts from these two periods, I matched districts based on shared populations following the method detailed by Crespin (2005) and data from the Geographic Correspondence Engine (Missouri Census Data Center 2014). As Crespin clarifies, this approach involves spatially intersecting the district boundaries of the old and new districts using census tract files to estimate a measure of continuity, allowing new districts to be matched with their 'parent' districts using basic population counts (see also Cox and Katz 2002). This process enables the assignment of time-invariant variables across both sets of districts. It also ensures continuity in pre- and post-period control variables in states where boundaries or district numbers were substantially reconfigured following redistricting (e.g., California, Florida).

[162] Hill, Hopkins, and Huber (2019) find that demographic change does not influence voting behavior, meaning I do not include a measure for this.

6.2.2 Identification Strategy

This section clarifies how the assumptions of 2x2 DiD analyses are met, including the requirement for comparable units and parallel trends prior to treatment to meet the stable unit treatment value assumption (SUTVA). I balance districts which do and do have factional Republican primaries, first estimating propensity scores using district-level characteristics not affected by treatment or outcomes, namely, the percentage of white voters and median household incomes. Next, I use inverse probability weighting (IPW) to remove bias between the treatment and control groups. To demonstrate the validity of this process, I present the weighted distributions of propensity scores and provide balancing statistics including standardized mean differences for the district-level characteristics. Finally, I demonstrate the parallel trends assumption (PTA) in the pre-treatment period.

6.2.2.1 2x2 Difference-in-Differences Design

I use a 2x2 DiD identification strategy to isolate the effect of local factionalism on the two measures of local partisanship. The treatment period is the three election cycles between 2010 and 2014, corresponding with the period when the Tea Party was active in national elections (Blum 2020; Gervais and Morris 2018; Pew Research Center 2019). The analysis uses the congresses immediately before (111th) and after (115th) the treatment as the pre- and post-treatment periods, respectively.

As specified under the potential outcomes framework, the difference-in-differences estimator δ_{it} is the difference in the sample average outcome for treated districts pre- and post-treatment ($\bar{Y}_1^T - \bar{Y}_0^T$) minus the difference in the sample average outcome for untreated (control) districts pre- and post-treatment ($\bar{Y}_1^C - \bar{Y}_0^C$).[163] I model the treatment effect on the outcome using pooled OLS regression rather than two-way fixed effects (TWFE) because the panel ID (district) is unbalanced by redistricting, meaning pooled OLS is more precise (Lechner, Rodriguez-Planas, and Fernández Kranz 2016). I report results using robust standard errors clustered at the district (panel ID) level to correct for autocorrelation and heteroskedasticity, in line with methodological best practice (Bertrand, Duflo, and Mullainathan 2004). I use the following additive form:

$$Y_{it} = \alpha + \lambda^{2016}{}_t \; + \; \gamma^{Factionalism}{}_i + \; \delta^{(2016 \times Factionalism)}{}_{it} + \varepsilon_{it}$$

[163] Meaning the average effect of treatment on the treated is written as a conditional expectation in the potential outcomes model as $\text{ATT}(\tau) = (E[\text{Y1}|\text{t} = 2016] - E[\text{Y1}|\text{t} = 2008]) - (E[\text{Y0}|\text{t} = 2016] - E[\text{Y0}|\text{t} = 2008])$, where Y_1 indicates treatment and Y_0 indicates no treatment.

Where Y is the position of the representative in district i at time t. α is the constant, the value of the control group in the pre-treatment period. λ indicates the post-treatment period, labeled as '2016 (Time)' in the models below. Whether a district is assigned to the treatment group is denoted by γ and reported as 'Factional Primary (Treatment)'. The interaction of the effect of treatment and time, δ, is the main DiD estimator, labeled 'Diff-in-Diff (Time x Treatment)' in the outputs below.

6.2.2.2 Conditional Independence Assumption

Identifying comparable units in the pre-treatment period is a key challenge when using a DiD estimation strategy for observational data. I estimate propensity scores and use inverse probability weighting (IPW) to balance treatment and control groups (Abadie 2005; Desai and Franklin 2019), where the propensity score gives the probability of being assigned into the treatment group based on observable covariates specified (Rosenbaum and Rubin 1983). This strategy is intended both to mitigate bias, and to avoid endogeneity issues that can result from generating propensity scores based on outcome variables (Rosenbaum 2012; D. B. Rubin 2007). Using potentially confounding characteristics, I estimate propensity scores via a fitted logistic regression, all observations are on common support meaning I do not trim the data.

I use IPW to satisfy the assumption of conditional independence. Prior to weighting, the most prominent difference between the treatment and control groups was that districts with particularly high propensity scores were disproportionately assigned to the treatment group (Figure 6.1, left). The goal of IPW is to use the propensity scores to create a weighted sample whose covariate distribution is the same between groups by taking the inverse of the probability of treatment (Rosenbaum 1987; Rosenbaum and Rubin 1983) to generate scores that correspond with the probability of being assigned to the alternative group: i.e., control observations being treated, and treated observations not being treated. IPW has the additional advantage of allowing the assignment of weights that vary over time, as opposed to having a weight fixed to the pre-treatment panel ID of congressional districts. I estimate propensity score weights separately for districts in the pre-treatment and post-treatment periods—as validated elsewhere (Stuart et al. 2014)—enabling the inclusion of districts before and after redistricting, including districts that only exist in one time period. Using fixed weights results in the removal of congressional districts which only exist in one period and gives potential spurious weights to districts which were radically transformed by the redistricting process.

To clarify how IPW influences these data, I present the descriptive statistics of both groups' weights in Table 6.2 alongside the propensity score distribution before and after

weighting in Figure 6.1. In addition, I perform a comparison of means and sample variances of unweighted and weighted baseline covariates, in line with IPW best practice (Austin and Stuart 2015). These results are also shown in Table 6.2. The standardized mean differences (SMD) between the control and treatment groups' districts characteristics are reduced by the weighting process, giving confidence that IPW has satisfied the conditional independence requirement.

Figure 6.1 Propensity Scores Before & After Weighting

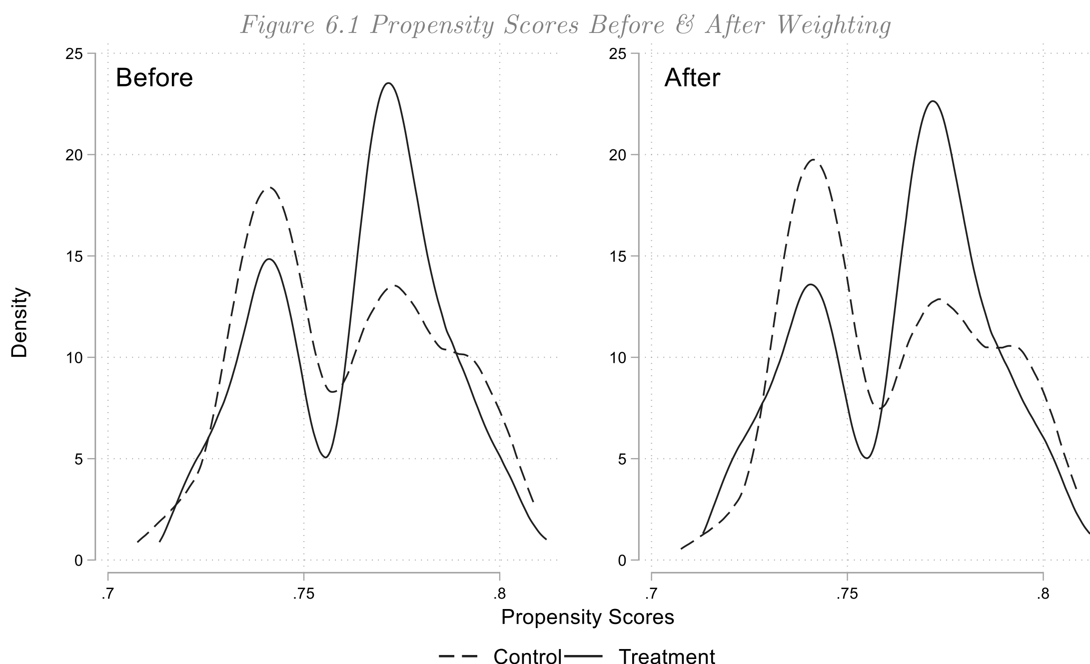


Table 6.2 Summary of Balance and Weighting Scheme

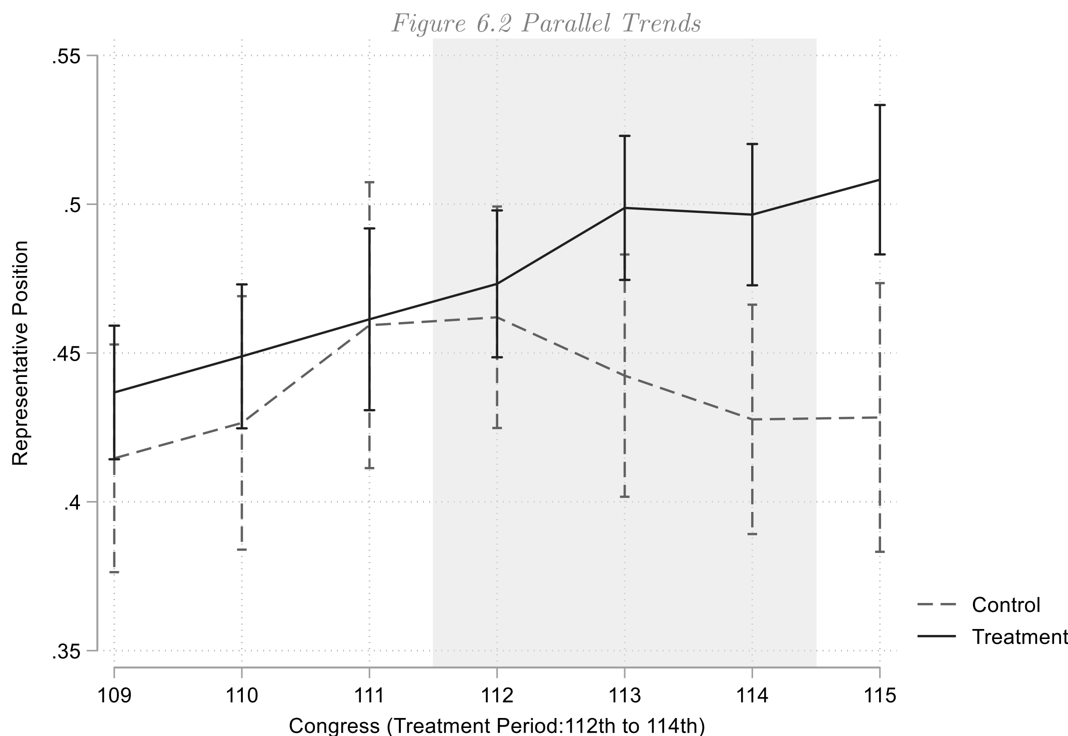
	Treatment			Control			Balance	
	Mean	Variance	Skewness	Mean	Variance	Skewness	Std-diff	Var-ratio
Unweighted Values								
White %	55.218	1242.090	–0.715	51.720	1250.705	–0.463	0.099	0.993
Median Income	$55,030	$18,131	$15,069	$55,794	$21,876	$9,134	–0.054	0.829
Median Age	38.115	9.942	0.935	37.641	14.328	–0.130	0.136	0.694
Urban–Rural	3.410	1.955	–0.409	3.296	3.074	0.002	0.072	0.636
Weighted Values								
White %	55.154	1242.715	–0.711	53.302	1261.259	–0.532	0.052	0.985
Median Income	$54,906	$17,865	$15,036	$55,457	$20,810	$9,222	–0.040	0.859
Median Age	38.091	9.864	0.927	37.900	14.612	–0.177	0.055	0.675
Urban–Rural	3.374	1.973	–0.373	3.403	2.857	–0.107	–0.019	0.690

6.2.2.3 Parallel Trends Assumption (PTA)

DiD estimation assumes that the treatment and control groups display parallel trends on the outcome variable prior to treatment, conditional on confounders (see e.g., Heckman, Ichimura, and Todd 1997). In other words, we must be reasonably sure that differences between the two groups were constant prior to treatment and would have remained constant over time absent treatment. If trends are not parallel, then we cannot assume that the treatment alone is responsible for changes in the treatment group's trends compared with the unobservable counterfactual where treatment did not occur. PTA is evaluated by graphing the differences between treatment and control groups. Figure 6.2 evaluates pre-treatment trends; satisfying

the PTA requires similar trends between the groups prior to treatment. As demonstrated, almost no statistical difference exists between the treatment and control groups in the three congresses prior to treatment, indicating that the assignment strategy meets the PTA.

Figure 6.2 Parallel Trends



The interest here is the outcome variables in treated districts *relative* to untreated districts; in other words, I measure 'against' the unobserved counterfactual where control districts had factional primaries. Given the pre-treatment trends shown, I expect that, absent factional primaries, these trends would continue to move in parallel for the rest of the period of analysis. Differences are measured in comparison to the unobserved outcomes of non-treatment on the treated or treatment on the untreated.

6.3 Rightward Movement in Districts with Factional Primaries

I expect that Republican representatives from treated districts will move further to the right, as measured by ideal points derived from roll-call votes, between the pre- and post-treatment period, compared to other Republicans. There are several mechanisms through which this change might occur in treated districts. Factional primary candidates who emerge victorious are likely further to the right than the members they replace, and incumbents are likely to position themselves to the right to defeat factional primary challenges. By extension, the lack of factional pressure in control districts should correspond with relative stability in those

districts' Nokken-Poole estimates. I present the full results in Table 6.3 and reference Figure 6.2 above.[164]

In the 111th Congress (2007 to 2009), the ideal points of Republicans from districts assigned to the treatment group and those assigned to the control group were not significantly different; by the 115th Congress (2017 to 2019), a clear difference was present between the two groups. The effect of local factional pressure indicated in Figure 6.2 becomes clearer still in the regression analysis shown in Table 6.3. The 2016 coefficient reveals non-significant difference over time (–0.031), indicating that representatives in the control group did not move rightward between 2008 and 2016. Representatives from districts which experienced local factionalism—whose positions were almost identical to representatives from other districts in the 111th Congress (0.002 difference)—were significantly further to the right post-treatment, with a 0.078 DiD effect. This figure is perhaps better understood as almost as large as the asymmetry in partisan difference between Republican and Democratic representatives in the 115th Congress (0.090).

Table 6.3 Full Results

	Republican Position
2016 (Time)	–0.031
	(0.029)
Factional Primary (Treatment)	0.002
	(0.029)
Diff-in-diff (Time # Treatment)	0.078**
	(0.033)
Observations	423
R-squared	0.031
Mean Control 111th Congress	0.459
	(0.024)
Mean Treated 111th Congress	0.461
	(0.016)
Diff 111th Congress	0.002
	(0.029)
Mean Control 115th Congress	0.428
	(0.023)
Mean Treated 115th Congress	0.508
	(0.013)
Diff 115th Congress	0.080
	(0.026)

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

[164] The results of multiple robustness checks are presented in the appendix.

These results indicate support for the main hypothesis, where rightward movement was influenced by pressure from the reactionary Republican faction, and where factional primaries were a significant predictor of Republican representatives' rightward movement *over time.*

6.4 Discussion & Conclusion

This chapter presented evidence that in the most likely circumstances, factional primaries *can* serve to move members of Congress away from the ideological center. The findings in this chapter align with other work highlight the importance of factions in shaping parties' policy platforms, election strategies, and organizational structures (Bendix and Mackay 2017; Bloch Rubin 2017; Blum 2020; Clarke 2020; M. Cohen et al. 2016; DiSalvo 2012; Kamarck 2014b; Masket 2020; Noel 2016; Saldin and Teles 2020; Thomsen 2017a) and indicates that congressional primaries are one such arena in which factions exert power.[165]

These findings also suggest that the link between intra-party homogeneity and inter-party polarization may be weaker than previously thought. Pressure from the reactionary Republican faction appears to have exacerbated trends towards ideological extremism, underscoring the need for continued attention on intra-party dynamics to understand inter-party trends. Though evidence of division among in the congressional Republican Party appears scant when using party unity scores, alternative metrics such as media coverage and leadership struggles indicate greater disunity (Lee 2018).[166]

This chapter also provides a potential template for understanding the impact that progressive Democrats might have on the Democratic Party, assuming their influence continues to grow (Schoen 2021; Wehner 2019). As discussed in chapter five, reactionary Republicans on the right and progressive Democrats on the left currently differ in both their organizational structure and their electoral strategies. Nevertheless, factional primaries also represent a path forward for progressive Democrats to move their party's congressional delegation further to the left.

Under the most-likely conditions, factional primaries *can* move elites away from the political center. The transformed dynamics of elite competition during the congressional nomination process documented in chapter four—particularly the increased ideological framing and factional support—therefore have the potential to change the profile of general election

[165] Empirically, this finding also suggests that the intra-party strife over policy, practice, and the adherence to democratic norms of the Trump era can be understood as a continuation of factional divisions that, if not introduced, were at least exacerbated during this period.
[166] These dynamics also have consequences for understanding affective polarization among partisans in the electorate, whose distribution "has not become bimodal but dispersed" (Groenendyk, Sances, and Zhirkov 2020, 1616).

nominees and, by extension, members of Congress. Chapter four demonstrated that candidate positions have become a more important dynamic in intra-party contests, meaning it is not unreasonable to think that ideologically extreme—or at least, more ideologically consistent—candidates may be more frequently preferred by voters in ideological and factional primaries. It is this subject to which I now turn. Whereas this chapter considered *whether* factional primaries can serve to move representatives away from the center, the remaining chapters in this section examine distinct mechanisms of *how* primaries may influence positioning. I start by examining the most discussed mechanism in both the academic literature and public discourse: the selective effect of primary voters.

7 Selective Effect: Do Non-Centrist Candidates Perform Better in Primaries?

The vast majority of Americans don't typically vote in primaries. Instead, it is the 'third of the third' most to the right or most to the left who come out to vote—the ten percent at each of the two extremes of the political spectrum.

Senate majority leader Chuck Schumer[167]

The logic of primary voters serving as a source of polarization appears intuitive and the narrative is now widely believed, where party's selectorates are thought of as more ideologically extreme than their general election voters and thereby act as a centrifugal force on candidates by nominating non-centrists and deselecting comparative moderates. Under this theorized effect, primary voters are assumed to be non-centrist rational actors who select ideologically proximate candidates out of positional congruence. Indeed, scholars who see a polarizing effect of primary voters argue that because these voters are ideologically sophisticated they prioritize candidates' positions (Burden 2001, 2004). In such accounts, primary voters are often contrasted with a general electorate that is largely innocent of ideology, and whose electoral behavior is shown to be motivated by factors other than positional congruence (Converse 1964; Kinder and Kalmoe 2017).

Primary voter polarization theory makes several assumptions about voter behavior in primary elections. First, for primary voters to be a source of polarization, they must hold meaningfully distinct positions from parties' general election voters. As discussed in chapter two, empirical evidence that primary voters are more extreme is, at best, mixed and tends towards the null (Boatright 2014; Drutman 2021; Hirano et al. 2010; Hirano and Snyder 2019; Sides et al. 2020). Second, these supposedly non-centrist voters must have sufficient information to be able to position same-party candidates in congressional primaries, and use this information—rather than alternative valence, demographic, or other non-policy factors—to inform their selection. Third, according to this model, primary voters may also not prioritize 'electability' or other strategic concerns about candidate viability in the general election but instead vote for the candidate closest to their position. Finally, for votes to contribute to polarization requires that primary electorates be not only further from the center than the party's general electorate, but also than (at least some of) the pool of available candidate

[167] (Schumer 2014)

choices. If primary selectorates are selectively rewarding relative extremism at the expense of moderates, then some viable candidates presented to the selectorate must hold more moderate positions than this group.[168] I revisit these assumptions in the discussion section at the conclusion of this chapter in relation to the empirical findings.

Whereas chapter six demonstrated that primaries *can* move political elites such as candidates for Congress away from the ideological center under the right conditions, this chapter examines the first mechanism through which primaries are said to contribute to polarization in Congress: the selective effect. To do so, I examine whether primary voters prefer non-centrist candidates across a series of four distinct empirical analyses.

In ideological and factional primaries, a clear—potentially highly salient—positional difference between leading candidates exists, meaning it is possible to identify voter preferences in those terms. In other words, ideological and factional primaries present an opportunity to test voter preferences. When presented with a comparatively moderate and polarized candidate, do primary voters systematically support candidates away from the political center as suggested by many scholars and media sources? In this first set of analysis (section 7.1) I find that, aggregated across all districts, non-centrist candidates are no more likely to become the nominee. However, non-centrist candidates are systematically preferred in certain districts. In safe Democratic districts, progressive candidates are clearly favored over establishment opponents in factional primaries, and candidates further to the left are more likely to win the nomination in ideological primaries in bluer districts. This pattern is less strong among Republicans. Beyond the asymmetric implications, this finding suggests that, as districts have become increasingly partisan, polarization emanating from primary elections may have increased. In competitive districts, primary voters remain concerned about electability, and so nominate the candidate closer to the ideological center and who has the support of the party's regular faction. When districts are unwinnable for the alternative party, this concern is alleviated and more polarized candidates with the support of their parties' realigner factions are more frequently selected. This is one manifestation of the changing electoral landscape in general elections having important implications for primary outcomes, as highlighted in chapter five.

Primary voters do not have access to equal amounts of information about all candidates. Therefore, they may behave differently in those primaries which they know

[168] If this final assumption is not met then non-centrist candidates will become the nominee, but it appears at least somewhat misguided to attribute this outcome to the preferences of primary voters if all available candidates are more 'extreme' than this group (see Bafumi and Herron 2010).

substantially more about at least one candidate running: incumbent primaries. In an incumbent primary, voters have a large amount of information about and are more likely able to correctly position one candidate—the incumbent—who has represented them in Congress for at least two years. If primary voters prefer non-centrist candidates, then moderates in these contests should face greater threat and perform worse than other incumbents further from the political center. In other words, these are the most-likely places where moderation will be punished. In this second section of analyses (section 7.2), I operationalize primary threat to incumbents in terms of challenger emergence, primary competitiveness, and—the least likely scenario—incumbent defeat. For incumbents, some associations between moderation and threat are observed, potentially suggesting that primary voters prefer non-centrist candidates, but simply lack the requisite information needed to position candidates outside of incumbent races.

When considering the potential polarizing effect of primary elections, it is important to ask the question, polarizing compared to what alternative mechanism of candidate selection? In the first two analyses in this chapter, I test the position of candidates against their primary opponents in the same district. But it is also necessary to examine the position of nominees who emerge from contested primaries *compared* to those who are nominated in other ways. Many nominees face no competitive primary and can be considered as the de facto party choice, others are selected through nomination systems with far narrower eligibility criteria such as party conventions. If, as posited by primary election polarization theory, primary voters are driving partisan polarization, then it appears essential to observe some positional differences between nominees who emerge from a contested primary and those who do not. This is the object of study in the third set of analyses in this chapter (section 7.3), first in terms of any primary competition and then in terms of ideological and factional primaries. In almost all cases other than incumbent primaries,[169] nominees from (ideological and factional) primaries are no further from the political center than those who become the general election candidate without facing a primary opponent. As in the analysis in section 7.1, this finding suggests that—other than when an incumbent is present—primary voters do not prefer non-centrist candidates.

Proponents of primary election polarization theory consistently reason that primaries polarize because voters who turn out in primaries are a small and ideologically unrepresentative

[169] Republican nominees from open factional primaries do appear to be more extreme than other Republican nominees in open seats.

subset of a party's general election coalition. Advocates of primary reform therefore contend that the remedy to this plight is to increase the size of the primary electorate (see e.g., Kamarck 2014a). Given that states have consistently been making their primary rules more inclusive during a period of increasing polarization, these trends seem, at best, ill-aligned. In the final set of analyses (section 7.4) in this chapter, I therefore test the relationship between primary turnout and nominee position. Regardless of how nominee 'extremism' is operationalized, no relationship with primary turnout is discernable, casting significant doubt on the narrative that primaries would contribute less to partisan polarization if only the selectorate could be sufficiently broadened.[170]

These four sets of analyses all test the selective effect of primary elections. In doing so, this chapter analyzes the mechanism of primary polarization advocated by Chuck Schumer above, that is, through the realization of non-centrist preferences of primary voters when casting their ballots. Taken together, the findings in this chapter demonstrate the absence of a selective effect from primary voters in non-incumbent primaries, and only a weak and substantively small effect when an incumbent is present. These findings therefore suggest that the polarizing effect identified in the most-likely case in chapter six is largely independent from the preferences expressed by voters in those primaries. At the end of this chapter, I discuss the implications and potential explanations for these findings in more detail.

7.1 Does 'Extremism' Align with Success?

The first test of the selective effect of voters on nomination outcomes is to consider what happens when relative moderates face comparatively 'extreme' candidates in primaries that are substantively about positional differences between candidates. This section therefore deals with the question of candidates' relative position *within* a primary election. Determining whether primary selectorates are nominating 'extreme' candidates requires measures of relative position for candidates within a given election (see also Hall and Snyder 2015). The measure used in this section is relative position compared to the primary opponent who finishes second. Though this measure is somewhat imperfect given the multitude of candidates in many primary contests, it at least enables us to say whether, of the two most viable candidates, primary voters preferred the comparatively more centrist or non-centrist candidate. To conduct these analyses, I use the previously established concepts of ideological and factional primaries. To determine whether non-centrist candidates are preferred across all districts, I conduct analyses

[170] The lack of finding here, is likely connected to the lack of positional differences between parties' primary and general electorates. I return to this subject in more explicitly in section 7.4.

at the candidate level, then consider the conditions under which non-centrist candidates are preferred in ideological and factional primaries.[171]

At the candidate level, I first perform a cross-sectional[172] logistic regression on candidates in factional primaries with winner as the dichotomous dependent variable and alignment with the parties' realigner factions[173] as the key independent variable in both models.[174] The results in the second and third columns of Table 7.1 indicate that realigner members were not significantly more (or less) likely to win their nomination contest than their regular opponents, with non-significant findings in both models. These results align with null findings of tests of variation in primary rules, which do not produce ideologically different nominees (Hill 2015; McGhee et al. 2014; Thomsen 2017c; but see Gerber and Morton 1998).

Table 7.1 Candidate Level Analysis

DV: Primary Winner	Democratic (Factional)	Republican (Factional)	Democratic (Ideological)	Republican (Ideological)
Realigner Faction	–0.101	–0.204		
	(0.412)	(0.301)		
CFscore 'Extreme'			–0.499	0.043
			(1.525)	(1.487)
Observations	1,358	1,552	840	1,186
Number of districts	355	374	277	325

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

I repeat these analyses for ideological primaries with the same dependent variable of primary success. Following the work of Andrew Hall (Hall 2015, 2019; Hall and Snyder 2015), I operationalize 'extremism' as a dichotomous variable where the candidate with the CFscore further from zero takes the value 1 and the comparatively moderate candidate takes the value 0.[175] I therefore test the relative ideological position within a primary contest. The results for ideological primaries in the fourth and fifth columns of Table 7.1 align with those in factional contests, with null results in all models. Candidates who receive support from either more 'extreme' donors—conceived in relative or absolute terms—or from their party's realigner faction do not outperform more moderate candidates.

These models indicate that there appears no electoral benefit for candidates aligned with a party's realigner faction or having a non-centrist donor base. These primary elections

[171] As elsewhere, I demonstrate that all findings in this chapter are robust to the introduction of performance thresholds (winner receiving less than seventy-five percent of the vote, and the second placed candidate receiving more than five percent of the vote) and a financial threshold (a minimum of two candidates filing FEC reports).
[172] In the appendix, I repeat all analyses using a multilevel model with state included as the grouping variable given the potential state-level variation due to differences in primary rules. In all cases, the results are unchanged, indicating little to no effect of variation of state-level primary rules on any of these outcomes.
[173] Progressive Democrats or Reactionary Republicans.
[174] Standard errors are clustered at the district level in all models.
[175] In the appendix, I repeat this analysis using candidates' CFscores in their raw form, these results are also non-significant.

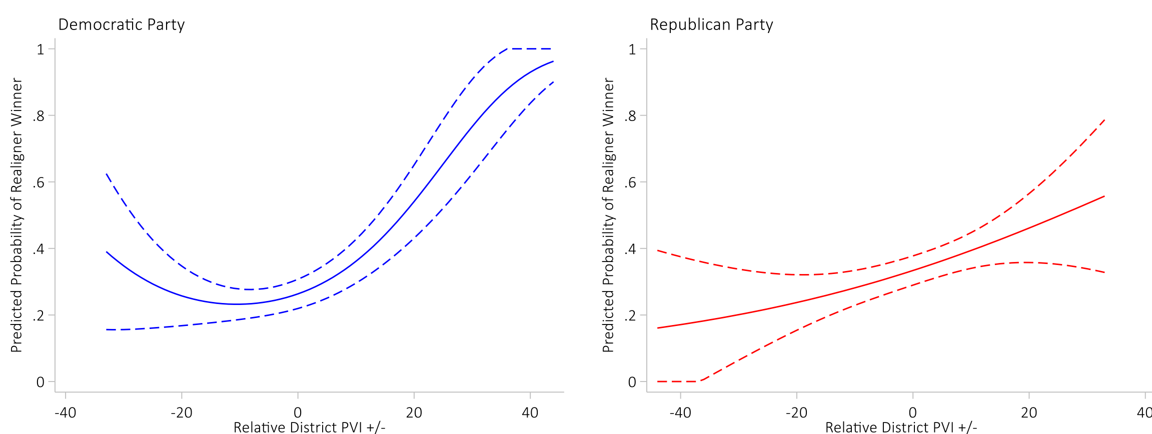
are fundamentally about candidates' factional identity and relative ideological positions. If voters prefer non-centrist candidates, these contests would likely be the places where that preference is most visibly expressed. That we do not observe evidence of the theorized selective effect here at the aggregate level indicates that we would also likely not see advantages of non-centrist positioning in other primaries—such as those focused on personal competence—where distinguishing candidates ideologically is likely even more difficult for primary voters.

7.1.1 Where Do 'Extreme' Candidates Succeed?

The above findings indicate that primary voters do not systematically prefer non-centrist candidates. Yet, there may be circumstances under which non-centrist positioning, either in factional or ideological terms, is rewarded. I run two additional models at the contest level to determine the conditions under which primary voters prefer non-centrist candidates.[176]

In factional contests, we observe a substantively significant relationship between district partisanship (PVI) and realigner candidates winning primary elections across parties and models. When realigner and regular candidates compete in factional primary, the likely winner is highly dependent on the partisan lean of the district. I present the predicted probabilities in Figure 7.1.[177] For Republicans, the relationship between district partisanship and realigner nominees is linear, meaning reactionary Republicans steadily increase their chances of winning a primary the more favored a district is for the party.

Figure 7.1 Probability of Realigner Winner of Factional Primaries



In the Democratic Party, this relationship is curvilinear, as shown by the non-linear trend in Figure 7.1, and the significance of the polynomial term in Table 11.20 in the appendix.

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[176] These models test district partisanship, controlling for differences in candidate level differences in quality, gender, and spending; district level demographic and economic features including percentage White and median income; and whether the primary is open, incumbent, or challenger. Full results including all controls are presented in the appendix.

[177] I present the full table of results including all controls in Table 11.20 in the appendix. Restricting these analyses to the post transformation period for each party, the relationship between district partisanship and outcome becomes even stronger in the Democratic Party (see appendix for details).

In districts within ten points of the national average (PVI +/–10), progressive Democrats have a particularly challenging time in winning primary elections against members of the establishment faction. In contrast to these competitive seats, progressive successes have been concentrated in safe districts. This finding aligns with other evidence indicating that progressive groups such as Justice Democrats "have focused on seats that were functionally impossible for Democrats to lose" (Weigel 2021). The strong relationship between district partisanship and nominee ideology in factional terms aligns with Carson and Williamson's finding in congressional general elections that the determinant of success is not the candidate's position, but "posturing relative to the constituency he or she seeks to represent" (2018, 188).[178]

Though progressives are generally better able to win factional primaries in districts that lean more Democratic, they also have somewhat more success in highly *un*favored districts. This relationship is likely the result of pressure and coordination from the formal party organization to ensure 'electable' (read: moderate) candidates in highly competitive districts, reducing the ability of realigner candidates to win the nomination. This explanation aligns with Kujala's finding that Democratic donors are "willing to exchange responsiveness for a more viable general election candidate in more competitive districts" (2019, 9). In districts that Democrats have little to no chance of winning, the formal party organization does not waste resources to ensure a viable nominee. That this relationship is not present in the Republican Party may indicate a comparative weakness or inability of the party's formal institutions to nominate their preferred candidates, lesser regard for general election outcomes by reactionary Republicans in line with the expectations of an insurgent faction, or evidence of the greater extent to which the reactionary faction has now taken over the formal party.

These results diverge even further by partisanship in ideological primaries, with a strong relationship between district partisanship and the likelihood of the candidate with the comparatively extreme donor base winning in Democratic contests.[179] This relationship is not present in ideological Republican primaries, as shown in Figure 7.2.[180] The null relationship between district partisanship and comparatively extreme winners in the Republican Party is of particular interest, potentially indicating that the formal party was willing to support comparatively extreme candidates regardless of district competitiveness, in line with research indicating that party-supported candidates were more ideological in 2014 than they had been

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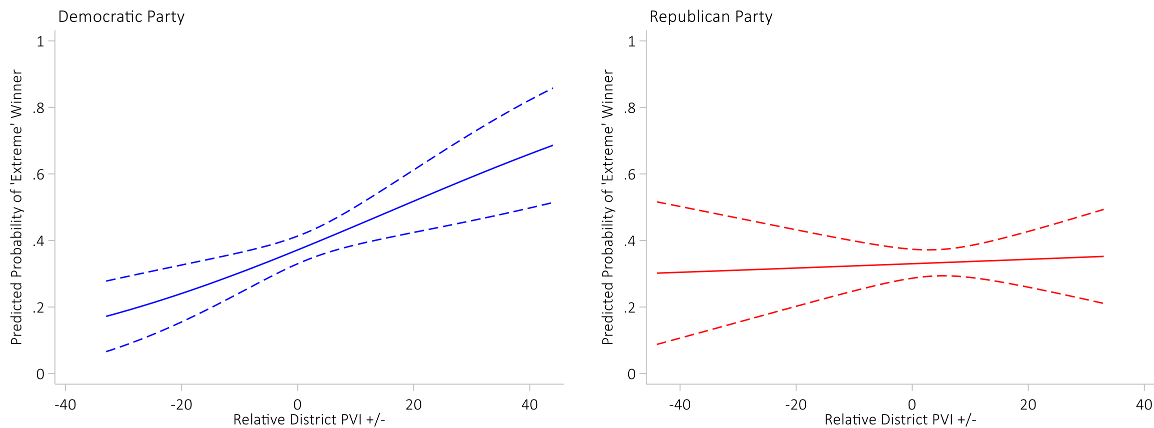
[178] This measure of partisanship may even be underpowered, with Ensley (2012) finding that district's heterogeneity also aligns with incumbent extremism.

[179] There was no substantive effect of including the polynomial PVI term in any of these models.

[180] See Table 11.21 in the appendix for full results including controls.

ten years earlier (Hassell 2018, 182).[181] Alternatively, this null finding may indicate the waning power of the formal institutions of the Republican Party over nomination outcomes, particularly in terms of selecting 'electable' candidates in competitive districts. Whatever the mechanism, this finding aligns with evidence that Republican selection of non-centrist candidates throughout this period may have hurt the party electorally in winnable races (Adler 2010; Montopoli 2010; Wilson 2021; Zelizer 2012).

Figure 7.2 Probability of 'Extreme' Winner of Ideological Primaries



These data offer further support to the idea of asymmetric factional competition, with the insurgent reactionary faction in the Republican Party comparatively unconcerned about nominating electable candidates in winnable districts, whereas progressives in the Democratic Party have been more strategic in their targeting of safe districts that the party cannot lose in the November elections.

These findings indicate that relatively extreme candidates do not outperform their more moderate opponents in primaries about ideological and factional differences between candidates. When considered across partisan space, the relationship between realigner success and district partisanship is stronger in the Democratic than the Republican Party. In ideological primaries, the relationship between ideologically 'extreme' candidate success and district PVI exists in the Democratic Party only, indicating that non-centrist candidates in Republican primaries are better able to win across a wider variety of districts.

7.2 Incumbent Position & Primary Threat

The above analyses indicate that ideologically extreme or factional realigner candidates did not perform better than comparatively moderate competitors even in primary contests that

[181] Hassell does not find this relationship in the Democratic Party.

were focused on the candidates' factional affiliations and ideological framing. Yet, non-centrist position-taking may matter in some contests, with voters potentially expressing a preference for non-centrist candidates when they have sufficient information about one candidate's positions. In an incumbent primary, voters have far more knowledge of one candidate, the incumbent, who has been their member of Congress for at least the two previous years. If the level of information about candidates' positions prevents primary voters from (de)selecting positionally (non)proximate candidates, we might still expect a relationship in contests where this informational barrier is lowest.

In the analyses in this section, I use two independent measures of relative position of incumbents versus the party median in each electoral cycle. The most prominent piece of information that voters have about an incumbent is their roll-call voting record in office, meaning the first independent variable is the incumbent's DW-NOMINATE score. Incumbents are also more likely to have established and visible networks of donors, in terms of groups and individuals that they publicly affiliate with and receive money from, I therefore use their CFscore as the second independent variable. These variables are rescaled relative to their party median for a given congress, such that positive scores indicate positions further from the center and negative scores indicate more centrist positions relative to the party median in both parties

These variables test distinct aspects of intra-party positioning. If primary voters are paying attention to an incumbent's behavior in Congress, we might expect roll-call voting to be the more salient predictor of threat. Alternatively, primary voters may be more attentive to issues focused on during the campaign, where donor support likely plays a more important role in the content of campaign material. In several of these analyses, roll-call voting appears a stronger indicator of primary threat in Democratic primaries, whereas donor support is more important in Republican primaries. These distinct patterns likely reflect partisan differences in primary voter coalitions and the organizational structure and importance of different groups within each party (Grossmann and Hopkins 2016).

Primary election polarization theory would therefore expect negative coefficients in all models in this section, with incumbents closer to the political center more likely to be threatened in primary elections. I test that threat in three steps: challenger emergence, primary competitiveness, and incumbent defeat.

7.2.1 Challenger Emergence

Incumbents' ideal scenario in terms of threat from within their party is preventing a primary challenger from ever emerging. If no other candidate throws their hat into the ring, incumbent

members of Congress become the party's nominee without facing the burden of competing in a contested primary. Avoiding a primary allows incumbent members of Congress to focus on the general election earlier in the year or invest time and resources in pursuing their legislative goals. Accordingly, I consider the emergence of a primary challenger as the first level of threat that an incumbent might wish to prevent. I therefore test how incumbent positions relate to the dichotomous variable of whether any challenger emerged.[182]

Table 7.2(a.) presents the results of four logistic regression models which test the association between 'extremism' and *any* primary challenger emerging. More moderate roll-call voting behavior by incumbents made them at least somewhat more likely to receive a primary challenger in both parties. For Democratic incumbents, a more liberal voting record appears an effective strategy to prevent being challenged in a primary. In the Republican Party, moderate roll-call voting is more weakly ($p<0.1$) associated with the emergence of any primary challenger. Being supported by a non-centrist donor network appears to be helpful in preventing the emergence of any primary challenger in the Democratic Party *only*.

Table 7.2 Incumbent Position & Challenger Emergence

DV: Challenger Emergence	Democratic	Republican	Democratic	Republican
a. Any Challenger				
Roll-call position (DW-NOMINATE)	–2.682***	–0.913*		
	(0.874)	(0.553)		
Donor position (CFscore)			–0.951***	–0.526
			(0.263)	(0.386)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337
b. Ideological Challenger				
Roll-call position (DW-NOMINATE)	–7.509***	–4.682***		
	(1.194)	(0.720)		
Donor position (CFscore)			–1.213***	–1.983***
			(0.368)	(0.473)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337
c. Quality Ideological Challenger				
Roll-call position (DW-NOMINATE)	–10.765**	–3.151*		
	(4.459)	(1.717)		
Donor position (CFscore)			–2.233*	–3.296***
			(1.215)	(1.127)
Observations	242	362	163	330
Number of districts	147	180	110	177

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

Given the increasing numbers of ideological primary challenges to incumbent members of Congress (see chapter four), I repeat the models restricted to *ideological* (i.e., non-centrist)

[182] All models contain the same controls as the contest-level models in the previous section. As before, the full models with controls are presented in the appendix.

challenges, with the results shown in Table 7.2(b.). Perhaps unsurprisingly, incumbent members of Congress with more moderate voting records and who receive support from more moderate donors are particularly likely to be challenged away from the ideological center in both parties.

Challengers with prior experience in elective office pose a far greater threat to an incumbent and tend only to emerge when they perceive a non-zero chance of winning the seat. Incumbent members of Congress are therefore particularly keen to prevent a *quality*[183] challenger from emerging. Table 7.2(c.) indicates that, even restricted to the universe of incumbents who receive an ideological primary challenger, comparative moderates are more likely to receive a quality challenger on ideological grounds. For Democrats, moderate roll-call voting appears more likely to elicit a quality ideological challenger, whereas Republicans with moderate donor support appear particularly vulnerable. I discuss this asymmetric trend further in the discussion section.

7.2.2 Primary Competitiveness

Of course, not all challengers who emerge pose an equal threat to incumbents. Though incumbents would likely prefer to win re-nomination without facing any primary opponent, most incumbent challengers receive a low percentage of the vote and are not considered a serious threat. The below models restrict observations to those primaries in which challengers emerge and take fractionalization[184]—the standard measure of primary competitiveness—as the dependent variable. Given the continuous dependent variable, fractionalization, I use OLS for all models in this sub-section.

Table 7.3(a.) shows the results for all contested incumbent primaries. In the Democratic Party there is a weak ($p<0.1$) association between moderation both in terms of roll-call voting and donor support, and greater competitiveness in the primary. For Republicans, the relationship between roll-call voting and primary competitiveness is not statistically significant but having a non-centrist donor base is strongly associated with less competitive primary elections. I consider reasons for these relationships below.

[183] As elsewhere, I use Jacobson's (1989) dichotomous understanding of candidate quality, where candidates are considered quality if they have previously held elected office and amateurs if they have not. See chapter three or the codebook at the end of this thesis for the method for coding candidate quality.

[184] Introduced in chapter three.

Table 7.3 Incumbent Position & Primary Competitiveness

DV: Fractionalization	Democratic	Republican	Democratic	Republican
a. All Primaries				
Roll-call position (DW-NOMINATE)	–0.151*	–0.064		
	(0.080)	(0.048)		
Donor position (CFscore)			–0.047*	–0.088***
			(0.024)	(0.030)
Observations	605	669	484	601
Number of districts	233	254	212	244
b. Ideological Primaries				
Roll-call position (DW-NOMINATE)	–0.490***	–0.019		
	(0.118)	(0.064)		
Donor position (CFscore)			–0.099**	–0.085**
			(0.041)	(0.039)
Observations	242	362	163	330
Number of districts	147	180	110	177

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

As in the previous sub-section, I then repeat these analyses on the subset of ideological primaries, with the results presented in Table 7.3(b.). In these primaries, similar relationships for Republicans are present, again suggesting that appealing to a conservative donor network rather adopting more conservative roll-call voting may be a better strategy for Republican incumbents wishing to limit the success of ideological primary challengers who emerge. For Democratic incumbents, both relationships are substantively significant, where non-centrist voting and donor networks were associated with less competitive ideological Democratic primaries.

Whereas Republican primary voters do not reward incumbents with more conservative roll-call positions in ideological primaries, Democratic primary voters are less likely to vote against incumbents with liberal voting records. Where ideological primary challengers emerge, they perform better against Democratic incumbents with moderate roll-call voting records and who receive donations from groups and individuals toward the political center. In ideological primaries in both parties, having a donor base further from the political center aligns with less competitive challenges. For Democratic incumbents, this result is consistent with Brady et al. (2007) who find that House members with more 'extreme' positions receive a higher proportion of the primary vote share. Donor support also likely aligns with campaign messaging, as candidates who receive support from groups further from the center are also more hostile to both the alternative party and the establishment apparatus of their own party. That the roll-call voting relationship exists for the Democratic Party *only* may indicate greater awareness of the behavior of Democratic members in Congress among their party's primary voters, possibly due to higher levels of education (Cohn 2021) or the higher salience of policy preferences among party identifiers (Grossmann and Hopkins 2016).

7.2.3 Incumbent Defeat

Deselection is the ultimate signal of disapproval that primary voters can send to an incumbent. Though incumbent defeats in primaries are rare—with only fifty instances across the entire dataset—these primaries received disproportionate media attention. Consequently, it seems likely that these contests might well influence the thinking of other members of Congress about the threat posed by intra-party contests. This sub-section therefore considers the relationship between incumbent position and primary defeat. As above, I consider extremism in these contests as the defeated incumbents' roll-call voting and donor base relative to the party median for that cycle.

Table 7.4 Incumbent Position & Primary Defeat

DV: Incumbent Loss	Democratic	Republican	Democratic	Republican
Roll-call position (DW-NOMINATE)	–6.124*	0.080		
	(3.582)	(2.252)		
Donor position (CFscore)			–1.898*	–1.699*
			(1.128)	(1.003)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

I find a weak (p<0.1) association between incumbent defeat and roll-call moderation in the Democratic Party *only* (Table 7.4).[185] As with primary competitiveness, this relationship does not exist in the Republican Party, but, in both parties, having more moderate donors is weakly (p<0.1) associated with incumbent defeat in both parties. All else being equal, relative moderation appears weakly aligned with primary defeats, though caution should be taken in generalizing this finding given the low significance of the statistical relationship and the few observations where incumbents lost.

Taken together, this section provided some evidence of a relationship between non-centrist positioning and reduced primary threat for the most high-profile candidates: incumbent officeholders. Incumbent moderation, both in terms of roll-call voting and donor support, aligns with higher levels of challenger emergence, more competitive challenges, and some weak associations with the likelihood of defeat. These findings align with other studies that indicate a small benefit of non-centrist position-taking during the primary phase of the election cycle (Brady, Han, and Pope 2007; Hall and Snyder 2015).

[185] These findings are consistent given that moderate Democratic DW-NOMINATE and CFscores are closer to zero and more liberal scores have lower (negative) scores.

Given that incumbent officeholders are relatively well-known in the districts that they represent and have a proven voting record and known donor networks, it is perhaps unsurprising that we observe some associations between position and voter behavior for these candidates. Primary voters simply know more about them, with enough information to assess their intra-party position during the nomination process. It is worth reiterating that the threat of incumbent deselection in a congressional primary is exceedingly low: of the 3,315 incumbents in these data who sought reelection, only fifty failed to advance to the general election. Even among incumbents who faced a primary opponent, the reselection rate was ninety-six percent.[186] At the margins, incumbent moderation appears associated with increased primary threat. In these primaries some selective effect is present.

The most consistent relationships between primary activity and nominee positions were in contests featuring an incumbent. In both parties, garnering support from non-centrist donors appears effective at both preventing primary challengers emerging and ensuring that they are less competitive when they do so; it is also weakly associated with lower levels of primary defeats. More consistent roll-call positions aligned with fewer challengers, less competitive primaries, and a somewhat lower risk of deselection for Democratic incumbents only.

7.3 Are Primary Winners More 'Extreme' Than Other Nominees?

To determine whether primary elections have a polarizing effect on nominee positions, it also appears necessary to demonstrate that nominees who win primary elections are more 'extreme' than other general election candidates. This section therefore considers the relative position of nominees selected *between* different selection mechanisms. If, as shown in chapter four, rates of contested primaries are increasing, then positional differences between those who do and do not face a contested primary might be a further way in which the nomination acts as a source of polarization. As indicated in that chapter, the reasons for primaries and support bases of candidates have transformed, meaning I also test for positional difference of nominees who win from ideological and factional primaries and those who win other types of primaries. If the polarizing effect of primary elections is conditional on them being contested on ideological and factional grounds, then we should expect to see nominees from these contests holding positions further from the ideological center. The goal here is not to establish a causal relationship between the presence of a contested primary and nominee positions, but to understand if

[186] Of 3,315 incumbents, 1,288 faced a contested primary.

positional differences between nominees who emerge with or without facing a primary selectorate exist.

As in the previous sub-section, I operationalize relative 'extremism' both via donor support (CFscore relative to the party median for that election) and roll-call voting (DW-NOMINATE relative to the party median for that election cycle) which serve as the two key dependent variables in Table 7.5. The dichotomous variable of any primary competition serves as the key independent variable. Given the importance of the position of the incumbent in primary contests, and to ensure the comparison of like-for-like observations where differences in position are not an artifact of the types of primaries in the contested and uncontested groups, I run separate models by party based on the status of the incumbent in the contest.[187]

Table 7.5 Any Primary Contest & Nominee Donor Extremism

DV: Nominee Position	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
a. Donor Support (CFscore)						
Contested Primary	–0.035	0.060	–0.035***	–0.013*	–0.045	0.002
	(0.033)	(0.039)	(0.012)	(0.007)	(0.051)	(0.056)
Observations	1,220	1,036	1,443	1,438	303	296
Number of districts	340	341	338	337	246	244
b. Roll-Call Voting (DW-N)						
Contested Primary	–0.010	0.020	–0.013***	–0.007	0.019	0.001
	(0.018)	(0.029)	(0.004)	(0.004)	(0.021)	(0.051)
Observations	154	159	1,676	1,593	159	217
Number of districts	132	129	359	340	137	176

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

I first analyze the between-election differences from the perspective of *any* primary contests. The base category in the below models is general election candidates who earn the nomination without facing a primary. Though the value of the nomination varies according to the district, earning the nomination unopposed in a primary can be considered as a proxy for party choice. Table 7.5(a.) shows that, among (potential) challenger and open contests in both parties there is no significant difference in donor positions between candidates selected in contested versus uncontested nominations. Only in incumbent races are Democratic candidates significantly ($p<0.01$) more likely, and Republican candidates somewhat ($p<0.1$) more likely to be more moderate when they earn the nomination by facing a primary.[188] The absence of positive coefficients in any of these models indicates that primary voters are not systematically

[187] As elsewhere in this thesis, open primaries are where no incumbent is present in either party, incumbent primaries are where the incumbent is running in that parties primary, and challenger primaries are where the incumbent is standing for the alternative party.
[188] This finding aligns with those in the previous sub-section indicating that more moderate incumbents are more likely to face a primary challenger.

selecting nominees who are any more ideologically extreme, as measured by their donors, than those chosen by party elites in uncontested primaries.

Non-centrist position-taking can also be envisaged in terms of roll-call voting behavior. These results are limited in observations to those candidates who ever served in Congress, meaning that observations are particularly limited in challenger contests given the relative paucity of these candidates who advance to Congress. Table 7.5(b.) presents these results. As with relative CFscore extremism, there are no statistically significant positive coefficients in these models, indicating that the presence of a contested primary does not align with relatively extreme nominees using this metric either. As with donor support, Democratic incumbents who face contested primaries are more moderate in their roll-call voting than other nominees. In all other cases, there were no statistical differences between the voting behavior of candidates who earn the nomination by facing contested rather than uncontested primaries.

Substantively, these findings align with those of Hirano and Snyder (2019), who compare nominees from contested primaries to those who earn the nomination via conventions, caucuses, and committee meetings going back to the 1950s, finding that these alternative nomination systems select *more* extreme nominees than primary elections. Causal research similarly finds that the introduction of primaries *reduced* the ideological distance between party elites (Cintolesi 2022). More exclusive selection mechanisms, theorized as being motivated by strategic decision-making by party elites who pick the most viable general election candidate, do not appear to be producing this outcome. Indeed, other accounts of party meetings find that factionally-aligned activists prefer nominating conventions whose rules are easier to navigate and enable them to select proximate candidates who may be deemed too extreme for the comparatively moderate primary electorate (Blum 2020). In short, when we consider the universe of general election candidates, those who earned the nomination by winning a contested primary are not positionally different to those that did not.

7.3.1 Are Ideological & Factional Primary Winners More 'Extreme'?

Given that many primaries are contested for non-positional reasons such as competence and valence factors, I repeat the above analysis restricted to ideological and factional primary contests. The non-difference between candidates who do and do not face a primary, as indicated in the above section, means I test whether nominees who emerge from ideological and factional primaries are positionally different to nominees who win other types of primaries. In this section, I therefore only include contested primaries, where nominees who win non-

ideological and non-factional primaries serve as the respective base categories. I use the same two measures of extremism relative to the party median as in the previous models.

Table 7.6 Primary Competition & Nominee Donor Extremism

DV: Nominee Position (CFscore)	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
a.						
Factional Primary	0.025	0.031	0.010	–0.034***	0.060	0.060**
	(0.045)	(0.044)	(0.022)	(0.013)	(0.058)	(0.027)
Observations	557	525	459	582	220	253
Number of districts	275	275	208	241	188	213
b.						
Ideological Primary	0.018	0.032	–0.007	–0.018	0.081	0.036
	(0.044)	(0.043)	(0.022)	(0.014)	(0.055)	(0.028)
Observations	575	540	484	601	223	254
Number of districts	278	277	212	244	190	214

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

Factional primary contests' relationship to nominee extremism, as measured using relative CFscores, is presented in Table 7.6(a.). In all types of Democratic primaries, no statistical difference in the position of candidates who earn the nomination via a factional rather than a non-factional primary contest is present. For Republicans, no relationship exists in challenger primaries, but incumbents who face a factional primary are significantly more moderate by this measure than those nominated via non-factional contests. Perhaps most interestingly, Republicans who win factional primaries in open seats are significantly to the right of those candidates who are nominated to an open seat in non-factional contests. This appears the one type of contest where voters do express a preference for non-centrist candidates, with a selective polarizing effect on the identity of the nominee. Non-centrist Republican donors appear to have additional power in open primaries, with voters more likely to nominate candidates with their support.

Table 7.6(b.) shows the results of the same analyses using ideological primaries as the independent variable. These models show no statistical difference between the positions of nominees from ideological and non-ideological primaries.

As in previous analyses, I also consider the relationship with relative roll-call voting position as the dependent variable. Table 7.7(a.) indicates that incumbents in both parties who earn the nomination via a factional—compared to a non-factional—primary were significantly more moderate in their roll-call voting behavior. In addition, Republican nominees who won factional challenger primaries were also more moderate than those who won other non-factional primaries of this type, though the number of observations of challenger winners

with DW-NOMINATE scores was small. There were no statistical differences between factional and non-factional winners in open contests in either party.

Table 7.7 Primary Competition & Roll-Call Position

DV: Nominee Position (DW-NOMINATE)	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
a.						
Factional Primary	0.029	–0.065**	–0.012**	–0.040***	–0.031	–0.022
	(0.020)	(0.032)	(0.006)	(0.009)	(0.023)	(0.022)
Observations	95	116	576	645	131	201
Number of districts	88	102	228	248	115	167
b.						
Ideological Primary	0.040**	–0.025	–0.007	–0.020**	–0.025	–0.002
	(0.019)	(0.057)	(0.006)	(0.009)	(0.023)	(0.021)
Observations	97	117	604	666	132	203
Number of districts	90	103	231	253	116	168

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

Finally, the same analysis is considered using ideological primaries as the key independent variable, with the result shown in Table 7.7(b.). Here, the data indicate that Democratic challengers who won ideological primaries were more extreme than winners of non-ideological challenger primaries in terms of roll-call voting, though, as with Republicans in the previous sample, the number of observations here is small and likely requires further investigation. As with factional primaries, Republicans who won ideological incumbent primaries tended to be more moderate than non-ideological incumbent winners.

Taken together, these models indicate minimal positional differences between nominees who won ideological or factional primaries, and those who won other kinds of primary elections. Incumbent winners of these primaries were often more moderate than other incumbents, consistent with the previous findings about incumbent challenger emergence. In only a couple of cases—donors for open Republican primaries between factions and roll-call positions in challenger Democratic primaries about ideology—were nominees from ideological and factional primaries more 'extreme' than other primary winners. The non-significant results elsewhere indicate that the descriptive shift from competence-based primaries to ideological and factional primaries documented in chapter four has not substantively altered nomination outcomes in terms of the position of the general election nominee. Even when primary voters are presented with candidates aligned with different factions and where the primary is explicitly contested on ideological grounds, they do not systematically prefer more extreme candidates than voters in other primary contests. This suggests that the transformation of primary competition identified in chapter four has not resulted in voters consistently nominating candidates further

from the center. In short, ideological and factional primary winners are not more extreme than other general election nominees.

In these between-contest analyses, primary winners were no more extreme in their voting behavior or donor support than candidates who became the nominee without facing a primary. This finding holds even when restricted to winners of primaries substantively about ideological and factional differences, indicating that the changing dynamics of primary competition documented in chapter four do not appear to have fundamentally altered the position of general election nominees.

7.4 Turnout & Nominee Position

Scholars who consider primary voters as a source of polarization commonly advocate broadening the selectorate franchise through participatory reforms (Alvarez and Sinclair 2015; Fiorina, Abrams, and Pope 2005; Kamarck 2014a). At the same time, many states have made their nomination systems more inclusive in recent decades, with reforms such as moving from closed to open contests or implementing a top-two non-partisan primary, as in the case of California.[189] The underlying assumption of theories of primary polarization and reforms implemented to alleviate them is that when turnout is low, the distribution of voters is skewed away from the ideological center. In this section, I therefore test whether lower turnout aligns with nominees further from the center. In other words, are nominees who emerge from primaries with higher turnouts meaningfully more moderate than their primary opponents or than nominees who win primaries with lower turnouts?

Mirroring the earlier sections of this chapter, I run four analyses considering extreme positioning both within and between primaries. In the within-contest analyses, nominee extremism is again operationalized first as membership of the realigner faction in Table 7.8(a.) and as a dichotomous variable of CFscore relative to the nearest primary opponent (b.)[190] In the between-contest analyses, nominee extremism is operationalized as CFscore (c.) and DW-NOMINATE (d.) relative to the party median. The key independent variable in all models—primary turnout—is operationalized as the percentage of a state or district's voting age population (VAP) that voted in the primary. All models return null results, indicating that regardless of how 'extremism' is operationalized, there does not appear to be an alignment with voter turnout.[191]

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[189] Studies indicate that the implementation of this reform has not had the desired moderating effect (see e.g., Kousser, Phillips, and Shor 2018). Perhaps more troublingly, most voters were not even aware of the reform (Ahler, Citrin, and Lenz 2016).

[190] Results of multilevel models with state as the middle level are substantively the same and are presented in the appendix.

[191] In the appendix, I also test these positions in absolute terms. Again, these models return null results.

Table 7.8 Primary Turnout & Nominee Position

Outcome	**Democratic All**	**Republican All**	**Democratic Factional**	**Republican Factional**	**Democratic Ideological**	**Republican Ideological**
a. Winner realigner	–2.251	1.595	0.508	2.126	-	-
	(1.835)	(2.283)	(2.533)	(3.236)		
b. CFscore within	0.071	–0.136	-	-	1.213	4.032
	(1.652)	(2.243)			(2.408)	(3.449)
c. CFscore between	-0.113	0.272	0.284	0.124	0.204	0.002
	(0.240)	(0.265)	(0.446)	(0.388)	(0.402)	(0.298)
d. DW-N between	0.010	0.034	0.007	–0.019	–0.039	–0.010
	(0.055)	(0.100)	(0.098)	(0.145)	(0.083)	(0.125)

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1[192]

Taken together, these results offer a clear refutation of a link between primary turnout and 'extremism', regardless of how it is conceived. This finding indicates that reform efforts with the goal of increasing turnout are unlikely to have a moderating effect on candidates selected.[193] This non-finding aligns with other empirical work investigating the link between primary systems and candidate ideology (Ahler, Citrin, and Lenz 2016; Kousser et al. 2015; McGhee et al. 2014; Rogowski and Langella 2015) and research using data extending back to the 1950s that finds extreme members of the House are no more likely to be nominated via lower-turnout primaries (Hirano and Snyder 2019, 260). When considered alongside the results in the previous sections of this chapter, these results suggest that expanding the primary selectorate is unlikely to produce more moderate nominees because current primary voters are not systematically selecting comparatively extreme candidates.

7.5 Discussion & Conclusion

Voters in primary elections preferring non-centrist candidates remained the most commonly argued mechanism through which primaries contribute to polarization, despite the limited evidence that these voters hold distinct positions. This chapter analyzed whether non-centrist candidates do indeed perform better in primaries, with little evidence of a selective polarizing effect identified. Primary voters do appear to express some preference for non-centrist candidates in those contests in which voters have the most information with which to position one candidate: when the incumbent is running in that party's primary. Elsewhere, and through different operationalizations of 'extreme' positioning, non-centrist positioning did not benefit candidates. Nominees who emerged from contested primaries were no further from the ideological center than those who became the party's general election candidate without facing a primary opponent. Even when contested primaries took place on ideological and factional

[192] All coefficients reported are for the independent variable 'primary turnout'.
[193] Such reforms may have other normatively negative effects, including questions about accountability in non-partisan primaries, and concerns that an expanded Democratic selectorate would be whiter (Masket 2020, 137).

grounds and were fundamentally about candidate positioning, the nominees who emerged from them were no more ideologically extreme. These results indicate that the polarizing effects identified in the previous chapter do not appear to be a demand-side result of voter preferences and therefore appear more connected to issues of candidate behavior and supply.

Taken together, these findings cast substantial doubt on the narrative of primary voters as a source of polarization and the necessary assumptions for a selective polarizing effect of primary voters. These data indicate that spatial patterns of success in general elections, where winners tend to be closer to the ideological center than losers (Carson and Williamson 2018), are reinforced—or at least, not contradicted—in primaries.[194] This finding runs counter to the theoretical expectations of primary voter polarization theory, suggesting that (at least some of) the assumptions outlined in this chapter's introduction are being violated.

One potential explanation of these findings is that primary voters are sufficiently informed to understand candidates in terms of general election viability and therefore strategically nominate candidates that they think will be able to appeal to their district's general electorate, rather than simply selecting the most ideologically proximate candidate. Studies of presidential primary voters highlight the importance of electability concerns, with evidence that voters place greater importance on strategic considerations relative to their sincere preferences (Culbert 2015; Masket 2020). The findings may therefore indicate a violation of the central assumption of primary election polarization theory; that voters prioritize ideological proximity rather than candidate electability when voting in primaries.

A second possibility is that primary voters are making decisions for reasons other than ideological congruence. Primary voter polarization theory assumes that primary voters prioritize positional proximity, but voters in low-information elections often rely on non-ideological cues such as demographics (Crowder-Meyer, Gadarian, and Trounstine 2020; Matson and Fine 2006; but see Henderson et al. 2021), and candidates' ideological congruence has become an increasingly poor predictor of voter choice over time (Utych 2020a). Survey experiments provide further evidence of the salience of non-policy attitudes among party elites and voters alike (Doherty, Dowling, and Miller 2019; Rogers 2020). The findings in this chapter may therefore be evidence that, beyond voting strategically, primary voters express preferences for candidates for reasons other than spatial proximity (see also Banda et al. 2022).

[194] Other empirical research lends further support to this finding, for example that Tea Party-aligned candidates were no more successful than other Republican candidates in the 2010 election cycle (Skocpol and Williamson 2012, 159).

Alternatively, primary voters may prefer proximate candidates but simply lack the requisite information needed to identify the candidate closest to them. This explanation aligns with other research indicating that primary voters are unable to distinguish ideological differences between same-party candidates (Bawn et al. 2019; Tausanovitch and Warshaw 2017a, 2013; Hirano et al. 2015).[195] In low-information environments, even voters who perceive that they are making ideological choices are simply projecting their own positions onto their preferred candidates (Ahler, Citrin, and Lenz 2016) who are often more ideologically distant (Drutman 2021). A lack of information about the position of most candidates seems a particularly plausible explanation for these findings given the associations between incumbents' positions and outcomes. Incumbents are the candidates that voters know most about, and the relationships between primary outcomes and these candidates' positions suggest that primary voters might be at least somewhat more inclined to express ideological preferences if they had a similar knowledge of other candidates.

Lack of information may be particularly acute among selectorates in high-turnout primaries, where the additional voters attracted to participate are likely less able to identify the proximate candidate than the comparatively informed selectorates expected in low turnout election. In such a scenario, it appears unlikely that these votes will disproportionately benefit moderates, offering one potential explanation for the null findings in section 7.4. The transformation of elite messaging documented in chapter four does not appear to have been received by primary voters, potentially because of—rather than despite—the increased levels of participation.

Finally, the absence of a relationship between candidate moderation and primary success may be due to a lack of moderate choices. Candidates for Congress hold positions further from the center than their primary electorates, theorized as "leapfrog representation" (Bafumi and Herron 2010; Kujala 2019), where nominees are, on average, to the right of their primary selectorates in the Republican Party and to the left in the Democratic Party. If candidates were rational vote-seekers and primary voters were selecting their proximate candidate in the manner that spatial theories expect, we should expect more moderate nominees emerging from primaries than we currently see. Consequently, a final potential explanation of these findings is the violation of the assumption of primary election polarization theory that there will be—at least some—moderate candidates relative to their primary

[195] Hirano et al. (2015) find that primary voters only learn about the ideological orientation of statewide candidates—such as those in Senate races—with little evidence that voters can distinguish candidates in down ballot races such as the House. Presidential primary voters can differentiate same-party candidates in ideological terms (Lenz 2012).

selectorates. The candidate emergence literature shows that moderates are failing to throw their hats in the ring and run for Congress (Thomsen 2017b), meaning that non-centrist outcomes are the result of non-centrist choices rather than connected to the preferences of primary voters.

In sum, the findings in this chapter indicate that primary voters do not systematically prefer non-centrist candidates, likely due to a combination of strategic voting, salience of non-ideological factors, a lack of information about non-incumbent candidates, and a paucity of candidate choices to the ideological center. The findings about incumbents suggest that primaries—especially ideological and factional primaries—do pose a somewhat greater threat to more moderate members of Congress, though even in these cases this threat rarely translates into defeat. More broadly, these findings call into question the popular narrative of primary voters as rabid extremists, consistently nominating highly liberal or conservative candidates. These findings demonstrate that candidates nominated by primary voters are no more 'extreme' than those selected under alternative means, including those in which the party apparatus has almost complete control such as party conventions or uncontested nominations.

The rightward movement presented in the most-likely case in the previous chapter therefore appears largely disconnected from primary voters' preferences, and as a result, appears more likely to be a consequence of the behavior of elites. In the following chapter, I test the first of these candidate-side mechanisms, positional adaptation by incumbent members of Congress between election cycles in response to a primary challenge: the between-election adaptative effect.

8 Between-Election Adaptative Effect: How Do Incumbents Respond?

It used to be they're looking over their shoulders to see who their general opponent is. Now they're looking over to see who their primary opponent is.

Former speaker Dennis Hastert[196]

"Primary constituencies" (Fenno 1978) are one of the most important groups that shape representatives' behavior. To retain their position in Congress, incumbents must act in a way that does not alienate partisan supporters or interests to such an extent that they prefer an alternative voice for the party. The primary constituency can therefore be conceived as also including the "coalitions of policy demanders" (Bawn et al. 2012) who are active in the party network during the nomination, as well as those partisan supporters who vote in the primary. Given that legislators are self-interested and primarily concerned with ensuring their reelection (Mayhew 1974), it seems likely that, when challenged in a primary on ideological or factional grounds away from the political center, incumbents will adapt their position to give themselves the optimal chance of remaining in Congress.

Theriault (2006) demonstrates that adaptation—where members of Congress become more conservative or liberal over the course of their legislative career—accounts for roughly one-third of congressional polarization between the 1970s and the 2000s.[197] In this chapter, I test the extent to which adaptation by incumbent representatives between elections is a response to (ideological and factional) primary challenges.[198] Incumbent members of Congress moving positions away from the center after a defeating a same-party opponent is therefore the second mechanism through in which primaries may contribute to polarization that is tested in this thesis.

The theoretical framework for member adaptation in response to a primary challenge is rather straightforward. Incumbents likely understand an ideological or factional primary challenge away from the center as evidence (some of) the party coalition and primary selectorate want a more consistent liberal or conservative voice in Congress. In other words, an ideological or factional challenger emerges because groups "believe that the incumbent is

[196] Quoted in Ryan (2013)
[197] The other two-thirds are the result of replacement of relative moderates by comparatively extreme members.
[198] Representatives also likely adapt positions to *prevent* ideological primary challenges. Given the requirement for alternative data that consider the repositioning of incumbents who successfully prevent an ideological challenge, I focus here only on movement once primary challengers emerge.

not ideologically extreme enough" (Jewitt and Treul 2019, 476). To counter a perception of being insufficiently partisan, incumbents may adjust their voting behavior in Congress, signaling to policy demanders and primary voters alike that they are team players and party loyalists. One oft-cited example of positional movement is John McCain's adoption of more conservative positions on climate change (Anderson, Butler, and Harbridge-Yong 2020) and the border fence (C. B. Meyer 2021b) after being challenged from the right by J.D. Hayworth in a Republican primary in 2010.

As we have seen throughout this thesis, primary voters are often conceived as holding non-centrist policy preferences (Hill 2015) and rejecting compromise positions (Anderson, Butler, and Harbridge-Yong 2020). Given this narrative, representatives may perceive that non-centrist position-taking is a strategic option to nullify the threat from an ideological challenger. Primary voters reward party loyalty (C. B. Meyer 2021b), meaning one way that incumbent members may respond to an ideological primary challenge is by voting more consistently in line with their party, producing roll-call voting scores further from the ideological center. Given the descriptive trends shown in chapter four, incumbents likely perceive most threat in a primary election from their factional and ideological flanks (i.e., from their left in the Democratic Party and the right in the Republican Party). Factional and ideological primaries are therefore where incumbents have the most incentive to signal party loyalty and congruence with primary voters and policy demanders in the party network.

This chapter is not the first attempt to understand incumbents' positional responses to primary challenges. Lawless and Pearson (2008) find no relationship between primary election results and members' roll-call voting behavior. Similarly, Boatright (2014) finds only a small change in incumbents' roll-call voting positions following a primary challenge. A similar analysis of Senate primaries concludes that, conditional on the level of threat posed, "Senators...vote more in line with their party leadership in the months before the primary date" (C. B. Meyer 2021a, 18). Conversely, Jewitt and Treul (2019) find that after defeating an ideological challenger, incumbents who are members of the majority party vote less in line with their party.[199] Other recent studies indicate that incumbents are less likely to cosponsor bills across the aisle after an ideological primary challenge (Barton 2022).

This chapter has several advantages over current studies. As shown by the trends in chapter four, the dynamics of primary competition have fundamentally changed in recent years. Current studies are overly reliant on historical data about primary competition or end

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[199] They find no effect for minority party members.

prior to the period of transformation identified earlier in this thesis. If reasons for primaries are now different, then incumbent responses to same-party challengers may have also changed. Updating our understanding to include more recent contests is one important contribution of this chapter, since much of the current literature does not include data from the previous decade (e.g., Boatright 2013; Jewitt and Treul 2019). Higher numbers of contested primaries also mean my dataset contains more observations than are used in many of the studies to date, increasing the precision of the formal models. I also differ from much of the existent literature in varying my expectations for incumbent responses based on the type of primary, using the previously established variables of ideological and factional primaries to test adaptation, and expecting heterogeneous responses from incumbents based on the nature of the primary challenge.

8.1 Expectations When Incumbents are Challenged

As with the empirical tests in the previous chapter, I begin by testing the effect of *any* primary on candidate positioning (H1). Given the lack of a theoretical mechanism for incumbents challenged on non-ideological grounds—such as those challenges concerned with incumbents' age, race, or competence—to adapt their positioning in response, I do not expect to find any evidence of positional adaptation in these primaries. This initial hypothesis considers the relative movement of candidates who do and do not face a primary challenger.[200] Accordingly, I first test representatives' responses to all primaries:

> H 1: Representatives challenged in any primary will move away from the center in their roll-call voting, compared to representatives who do not receive a primary challenge.[201]

Next, given the importance of intra-party factional support in primary elections, I test the adaptative effect following a factional primary. Representatives with the support of their party's establishment or regular faction are incentivized to adjust their position after being challenged on factional grounds by an opponent supported by their party's realigner faction (H2). Incumbents who elicit enough intra-party opposition for forces to be galvanized into action and coalesce around an alternative candidate will be the most likely to adjust their voting behavior in future congresses toward that realigner faction, i.e., toward the left in the

[200] A null finding for H1 would also indicate greater generalizability of any substantive findings for the two subsequent hypotheses. If H1 returns null findings, then the control group in this hypothesis (incumbents who receive no primary challenger) would therefore likely serve as an appropriate group for H2 and H3.

[201] For consistency of approach, I construct all hypotheses as if I expect to find an effect.

Democratic Party and the right in the Republican Party. H2 therefore tests the effect of factional primaries on party regulars:

> **H2**: Representatives with the support of their party's regular faction will move away from the center in their roll-call voting when challenged by candidates with realigner support, compared to other regulars challenged on non-factional grounds.

I then apply the same test to all incumbents in ideological primaries, where I expect that representatives who are challenged on positional grounds in ideological primaries will also adapt their roll-call voting behavior away from the political center (H3). H3 therefore tests the effect of ideological primaries on all incumbents:

> **H3**: Representatives challenged on ideological grounds will move away from the center in their roll-call voting, compared to representatives challenged on non-ideological grounds.

Between-election positional adaptation might provide two distinct benefits to representatives. First, it might serve as a signal that they are listening to feedback from the district that has emerged in the form of a same-party opponent. Second, it may enable them to discredit positional criticism from within their party, especially if they toe the party line either consistently or on certain high-profile votes. Given that primary voters are relatively politically informed (Blunt 2000; Sides et al. 2020), incumbents might reasonably expect such signals to be received by this electorate. I therefore expect incumbents challenged on ideological and factional grounds to adopt roll-call positions further from the political center compared to representatives who have no such incentive to move in this way, namely incumbents who receive a non-ideological primary challenger.

Because I only analyze incumbents who survive primary challenges, I expect that representatives will continue to hold their adapted positions in subsequent congresses rather than returning to their pre-challenged positions, as their adapted position proved successful in keeping them in Congress. To capture adaptation across multiple congresses, I separately measure movement in each subsequent congress against their position when they received a primary challenge. Holding an adapted position may also have the added benefit of warding off future challengers.[202]

[202] I explicitly do not test this effect.

Other literature finds that members "die in their ideological boots" (Hall and Snyder 2015, 28), and do not adapt their positioning when they are challenged in (any) primary (Boatright 2013, 2014).[203] These findings serve as the theoretical foundation for the null in all hypotheses. As elsewhere in this thesis, I run separate models for Republican and Democratic representatives given the distinct dynamics in each party.[204] I may therefore find different results for a given hypotheses at the partisan level.

8.2 Estimating Incumbent Responses

To estimate intra-representative adaptation, I use a fixed effects model clustered at the individual (representative) level. I therefore test representatives' movement, or adaptation, in subsequent congresses after they are challenged in a primary. These data allow me to exploit the longitudinal dimension of the dataset by including individual fixed effects, designed to capture any time-constant differences across individuals.

Given the added complexity of including senators in this analysis due to the six-year terms elected on a rotating basis,[205] I restrict my dataset in this chapter to the House of Representatives. Because this chapter analyzes representatives' responses to primary challenges, I also limit my cases to incumbent primary elections. In addition, as the object of interest is adaptation *between* congresses, I subset the data to those incumbents who served at least two consecutive terms in Congress since the 109th Congress.[206] The dataset is therefore structured with the representatives' individual identifiers[207] as the panel variable.[208] Having the individual as the panel variable also enables tracking of representatives' positions even if they change congressional districts, for example due to redistricting.

The time variable in the data is therefore set at the congress,[209] with the results presented as movement relative in time to a (given type of) primary election, operationalized in terms of number of congresses. For clarity, this variable takes the value 0 in the congress in which a representative receives a (given type of) primary challenge, 1 in the subsequent

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[203] "There is no clear evidence of shifts in ideology among incumbents who face primary challenges" (Boatright 2014, 192).
[204] Using separate models with an identical design.
[205] Analyzing differences in the behavior of senators in the congress they are up for re-election could be an interesting extension of this project using these data.
[206] Where the first primary cycle considered are challenges in 2006.
[207] `winner_icpsr`, see codebook at the end of this thesis for details.
[208] Unlike in chapter six, where the district identifier serves as the panel variable because the position of the district was the object of interest.
[209] In the appendix, I repeat my analyses with the addition of a congress fixed effects temporal control, the results are unchanged.

congress, 2 in the congress after that, and so on. The congress prior to an intra-party challenge emerging takes the time value –1.

8.2.1 Outcome Variable

The key outcome variable of interest is a representative's roll-call vote *movement*, operationalized using Nokken-Poole NOMINATE (Nokken and Poole 2004). When challenged in a primary on ideological or factional grounds, I expect that incumbents will respond by adapting their roll-call voting away from the center, or, in other words, becoming more aligned with their co-partisans and more dissimilar from the alternative party. As noted elsewhere, this operationalization of 'extremism' is consistent with the literature on primary elections (see e.g., Hall 2015), and may be a consequence of increasing partisan consistency, non-centrist position-taking, or some combination of the two. I expect that incumbent representatives will adopt more consistent or 'extreme' roll-call voting, relative to their position when a challenger emerges.

Roll-call movement therefore serves as the dependent variable in all models. To test over-time positioning, or more specifically, whether incumbents continue to hold their adapted positions, I use lead versions of this outcome variable, i.e., representatives' movement two, three, four or five congresses after they receive a challenge compared to their position in the congress in which they were challenged. I consider movement since $t0$ as the outcome in all models, with an additional model showing movement between $t{-}1$ and $t0$. In the appendix, I repeat my analyses with movement since $t{-}1$ as the dependent variable. Given the temporal endogeneity issues introduced by considering $t0$ as the first treated period, where candidates only become aware of the treatment halfway through the period,[210] $t0$ is used as a preferable benchmark of candidate positioning and considered the final pre-treatment period.[211]

8.2.2 Treatment Variable

The treatment variables for all three hypotheses are straightforward, in hypothesis one it is the dichotomous presence of *any* primary for representative i at time t. For hypothesis two, I first restrict the universe of cases to those representatives who are supported by their party's regular or establishment faction to ensure a like-for-like comparison group. In this hypothesis, factional contests are considered as the treatment, where 1 represents a challenger from the

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[210] For clarity, each period is a congress which runs for two years from January to January of odd years. Primary challengers must file their candidacy by spring to summer of even years (exact dates vary by state). Though some incumbents may be aware that they will receive a primary challenger well before their opponent files, others may be unaware that a challenger will emerge for most of the congress and behave as if they will have no challenger.

[211] Further justification for this decision is provided in the appendix.

realigner faction and 0 represents a non-factional contest. Incumbents aligned to the regular faction and who receive a factional challenge are therefore the treatment group, and regulars who received a non-factional challenge serve as the control group.

Finally, in hypothesis three, all incumbents who receive an ideological primary away from the center[212] are considered treated, and those who receive a non-ideological primary challenge are considered as untreated.[213] This treatment condition is broadly similar to the key independent variable used by Jewitt and Treul (2019). One advantage of this study is the larger number of ideological primary challenges identified, with 319 (137 Democratic, 182 Republican) challenges to incumbents considered as treatment scenarios.[214]

8.2.3 Confounding Variables

As in previous chapters, I include several controls which might encourage congress-to-congress positional movement in ways not connected to primary challengers. Members of Congress representing safer districts for the party are more likely to move away from the center over time, especially if a district becomes *relatively* safer for their party at the presidential level. Therefore, I include the standard measure of district partisanship, PVI (Cook Political Report 2017), in all models. Including this measure makes for a harder test of adaptation, likely dampening the size of the effect which would disproportionately be observed in safer districts for the party, where incumbents are more likely to prioritize their primary rather than general constituency (Fenno 1978).

I also control for two demographic and economic variables: percentage White and median income. Estimates are taken directly from the U.S. Census Bureau's American Community Survey (ACS) website (U.S. Census Bureau 2021). Due to the clear racial partisan divide during the period of study, the central influence of race on U.S. political attitudes (Hutchings and Valentino 2004), and the salience of White identity in partisan political conflict (Jardina 2019), I include district whiteness, measured as the percentage of the district's voters that are White, as defined in the ACS. Representatives' positions could vary in either direction based on the racial demographics of their district. For Democrats, White liberals in the electorate have been shown to hold positions to the left of voters of color, even on questions

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[212] Coded as "Ideology – I" as the `reason_for_contest` variable.

[213] Given the possibility for movement in either direction from incumbents challenged from the ideological center ("Ideology – C" in the `reason_for_contest` variable), I exclude these representatives from the control group in the main analysis and conduct a separate analysis comparing adaptation among incumbents challenged on centrist and ideological grounds.

[214] For comparison, Jewitt and Treul's article includes sixty-seven ideological challenges. This difference reflects a combination of their reliance on Boatright's data and their own non-digital data collection plus a function of the earlier period of analysis (their data end in 2012) where fewer ideological challenges were identifiable.

of race (Hawkins et al. 2018; Pew Research Center 2017, 2021). Black Democratic partisans also have a more diverse set of self-identified ideological labels than White partisans (Jefferson 2020). Consequently, Democratic representatives from whiter districts may have more incentive to adopt positions further to the left. Alternatively, Democrats in whiter districts may be more reliant on independent or even moderate Republican identifiers pushing them toward a more bipartisan voting record. For Republicans, heavily reliant on the votes of White constituents in all districts, the share of White voters may align with more conservative roll-call voting, especially on issues with implicit racial connotations such as welfare support or crime. Alternatively, Republican representatives may perceive greater electoral benefit from more conservative voting in districts where White voters make up a smaller share of the electorate.

I also control for district median income given that 'economic anxiety' is a commonly argued explanation of the rightward shift in the Republican Party (e.g., Autor et al. 2020), despite data indicating that affluent voters have more conservative attitudes and preferences (Gelman et al. 2007). Under the economic anxiety framework, it might be expected that Republican representatives from lower-income districts would move further to the right, and Democratic representatives would move less to the left.

8.2.4 Specification

The full specification for each fixed effects model is therefore:

$$Y_{itn} - Y_{it0} = \mu_{tn} - \mu_{t0} + \beta_1^{primary} X_{itn} - X_{it0} + \beta_2^{controls} X_{itn} - X_{it0} + \alpha_i + (\varepsilon_{itn} - \varepsilon_{it0})$$

Which can be rewritten as:

$$\Delta Y_i = \Delta\mu + \beta_1 \Delta \mathrm{X}_i + \beta_2 \Delta \mathrm{X}_i + \Delta\varepsilon_i$$

Where Y is the dependent variable for each representative i measured at period t (congress) relative to $t0$, the congress in which the primary challenge took place. In other words, the left-hand side of the equation corresponds to a representative's *movement* between the congresses in question. n is the number of different congresses on which I run the model. Given the available data and non-findings in later periods, I run the model for each congress from $n = -1$, the congress prior to that in which the primary took place, until $n = 5$, the first congress in which findings are null for all models.[215] μ is the intercept or constant term in each

[215] For the $n = -1$ model the left-hand side of the specification is slightly amended to $Y_{it0} - Y_{it-1}$ with equivalent changes to each variable on the right of the specification.

given period. β_1 is the key coefficient of interest and is any primary, factional primary, and ideological primary in hypotheses one, two, and three, respectively. β_2 denotes the coefficients on the set of control variables discussed above: PVI, district percentage White, and district median income. α is the first error term that represents the combined effect on Y of all unobserved variables that are constant over time. ε is the second error term relating to purely random variation at each point in time. In the rewritten specification, Δ represents the differences in time periods, meaning α is no longer a concern. As a result, we can get unbiased estimates of each β by performing OLS on the differences. Standard errors in all models are clustered at the representative level.

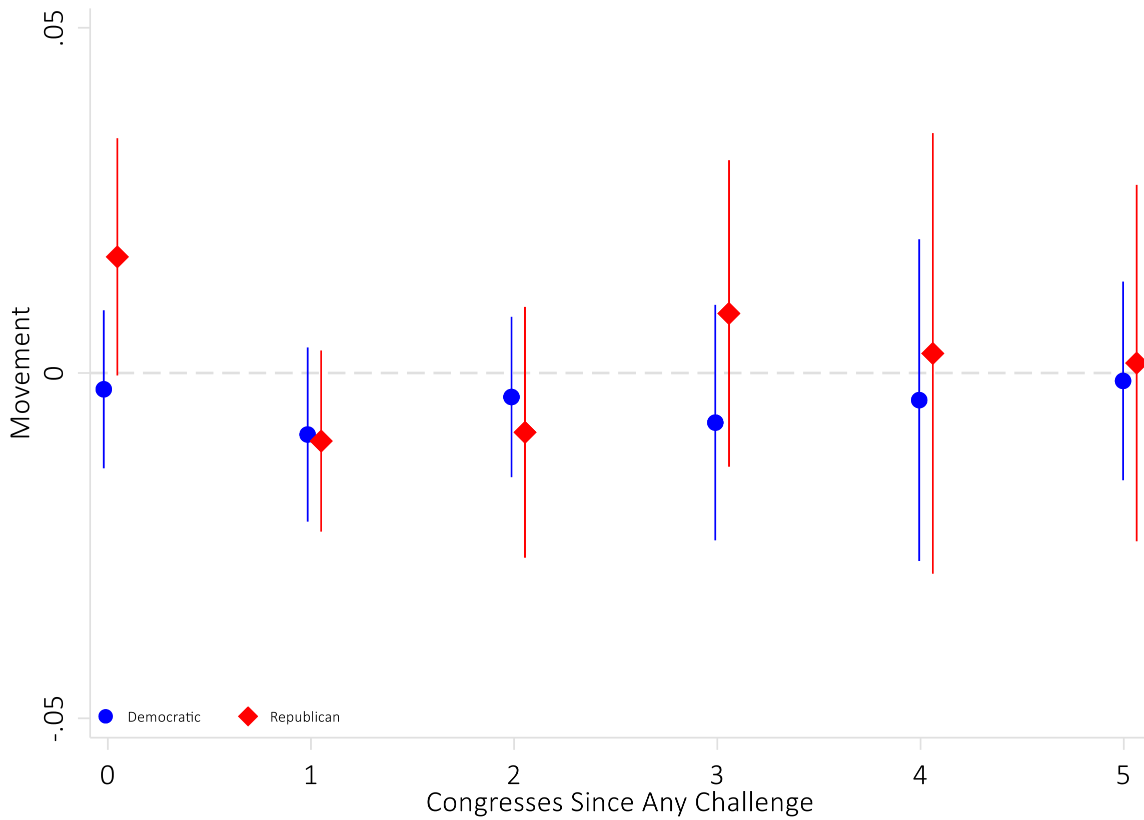
8.3 Do Incumbents Move After a Primary?

Below I present the results for each hypothesis in turn. Representatives in both parties move significantly away from the center following a factional challenge (H2); this effect size is smaller and less significant for ideological primaries (H3). As expected, when testing all primaries, there is no between-election adaptative effect in either party (H1). In each case, I present the results of the models as coefficient plots over time since the primary challenge. These should be interpreted as the relative movement in roll-call voting against pre-primary position given the presence of (a certain type of) primary election. Figures shown for congress zero are movement from congress $n = -1$; all other coefficients are the movement from $n = 0$. As elsewhere in this thesis, positive coefficients indicate rightward (conservative) movement, and negative coefficients indicate leftward (liberal) movement.

8.3.1 Hypothesis One: All Primaries

In line with previous findings in the literature (Boatright 2013; Hall and Snyder 2015), when I compare movement among the universe of all representatives who receive a primary challenger against those who do not face a primary challenge in a given election cycle, no subsequent movement in either direction from members of either party occurs, as shown in Figure 8.1. These results indicate that Republican incumbents may move slightly to the right in the congress *during which* they face any challenger, but they offer no evidence of longer-term adaptation, where movement of representatives in both parties is non-significant and substantively at or close to zero. These findings mean I fail to reject the null hypothesis for H1 for either party.

Figure 8.1 Movement Following Any Primary Challenge



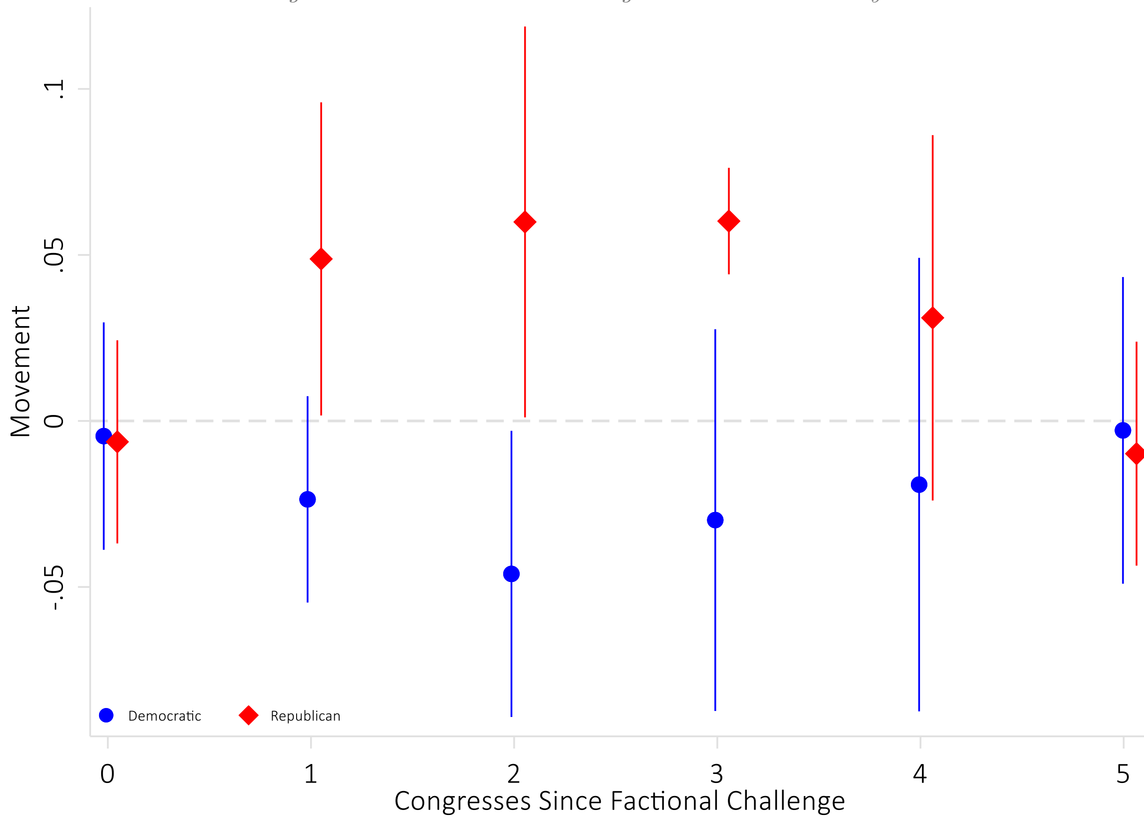
8.3.2 Hypothesis Two: Factional Primaries

When I restrict analysis to representatives who are aligned to their party's establishment faction and receive a challenger from the realigner faction, post-primary adaptation is visible in both parties. For clarity, the comparison group here is restricted to other establishment faction-oriented incumbents who receive a primary challenge not coded as factional.

Figure 8.2 indicates that establishment Republican representatives moved significantly to the right in the congresses following a factional challenge, compared to other establishment Republicans. Challenged representatives maintained their adjusted positions for a further three congresses (six years) after the initial factional primary. Substantively, if the rightward movement of 0.05 affected the entire Republican cohort (it doesn't) it would be the equivalent of one fifth of the total movement of the median Republican in the House of Representatives since the 96th Congress (1979 to 1981) and roughly half of the median rightward movement in any given congress during that period.[216] Though this movement only takes place among a subset of representatives—regulars who receive realigner challenges—it does not dissipate entirely for ten years.

[216] Data from Lewis et al. (2021)

Figure 8.2 Movement Following a Factional Primary



Though evidence of Democratic adaptation is not nearly so conclusive or statistically powerful, a clear leftward trend after representatives receive factional challenges is also present. The non-significance of this result in all congresses except the second is perhaps unsurprising given the comparatively static position of Democratic representatives. In the period analyzed here—the 110th to 117th congresses—the median Republican moved from 0.42 to 0.51 in terms of NOMINATE score, whereas the median Democrat only moved from –0.35 to –0.37. Asymmetry in the variation of the dependent variable largely explains the partisan differences in terms of substantive size and significance of these findings, with Democratic representatives who were challenged in factional primaries responding in a more modest and statistically insignificant way in most congresses. For context, the substantive size (–0.046) of the only significant leftward movement, the second congress since the factional challenge, is roughly equivalent to one quarter of the leftward movement of the median Democrat over the *entire* eight-congress (110th to 117th) period.

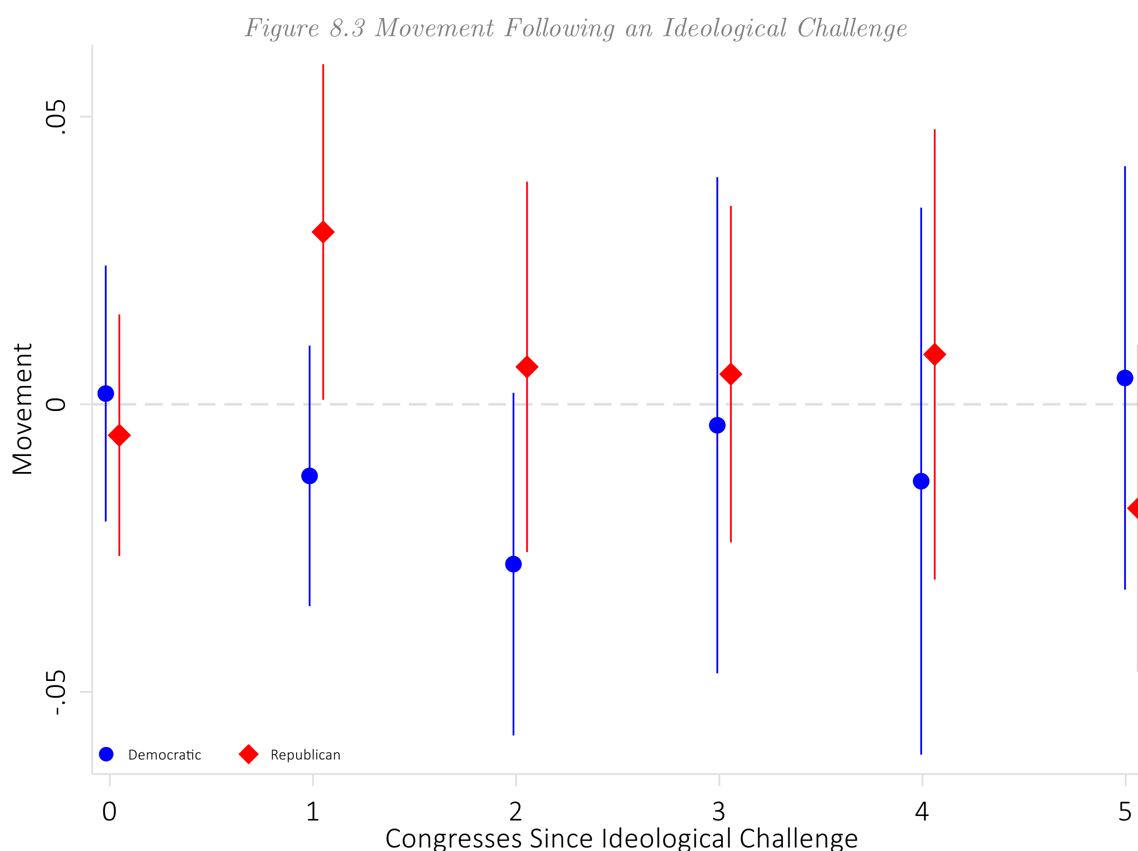
In both parties, there is minimal evidence of adaptation in the congress in which representatives are challenged, likely because of the temporal endogeneity previously discussed. Evidence of a between-election adaptative effect towards their respective poles emerges in the following congress among Republicans and Democrats alike. Taken together, this evidence enables the rejection of the null hypothesis among Republican incumbents and more tepid

support for H2 among Democrats, likely conditioned by the comparatively limited movement in roll-call voting.

8.3.3 Hypothesis Three: Ideological Primaries

When I broaden the inclusion criteria for treatment to include all representatives who were challenged on ideological grounds from their party's pole, we again see partisan asymmetry in the results, as shown in Figure 8.3. For Republicans, the rightward movement in roll-call voting is only significant in the subsequent congress, and, though movement is in the theorized direction in future congresses, it is substantively close to zero and not statistically significant. Among Democrats, we observe some non-significant leftward movement in the four congresses following an ideological primary challenge. As in previous models, the coefficients for representatives in both parties in the congress in which they receive an ideological challenger are at or close to zero, likely due to temporal endogeneity, with candidates voting on bills in the first year of this congress before having knowledge of their primary competitors.[217]

Figure 8.3 Movement Following an Ideological Challenge



These models indicate some weak associations for H3, especially for Republicans in the congress immediately after an ideological challenge. In other cases, these models are not

[217] Jewitt and Treul (2019) examine within-congress adaptation in roll-call voting when incumbents are challenged on ideological grounds. I take an alternative approach to within-congress adaptation in the following chapter.

powerful enough to enable us to reject the null hypothesis, though the direction of movement aligns with theoretical expectations for representatives in both parties.

8.3.4 Centrist Challenges

Given the above theorized mechanism of candidate positioning in primary elections, it seems most likely that candidates who are challenged from the political center will not move in either direction. However, it may also be that the very nature of having a same-party debate and public vote on relative intra-party positions induces more partisan consistency among challenged incumbents. Alternatively, incumbents may recognize that they are being threatened to their ideological center and adopt more moderate or bipartisan roll-call positions.

Table 8.1 Incumbent Responses to All Ideological Primaries

	Democratic Ideological	Democratic Centrist	Republican Ideological	Republican Centrist
"Ideology – I" Primary	-0.012		0.030**	
	(0.011)		(0.015)	
"Ideology – C" Primary		-0.021		-0.028
		(0.015)		(0.027)
Observations	491	491	542	542
R-squared	0.008	0.011	0.024	0.013
Number of representatives	223	223	248	248

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

Table 8.1 shows the results of model at congress $t1$ (i.e., the congress immediately after the one in which an incumbent was challenged) using two separate independent variables.[218] The first indicates movement following an ideological challenge (as presented in Figure 8.3), and the second indicates movement following a centrist challenge. Though neither of the centrist coefficients are statistically significant, they provide some interesting directional data, where Republicans challenged from the center moderate slightly in the following congress, in line with theoretical expectations from spatial theories of electoral competition (e.g., Downs 1957a). Conversely, Democratic representatives who are challenged from the ideological center (i.e., to their right) move leftward in their roll-call voting behavior in the subsequent congress. Though not statistically significant, this movement is substantively larger than adaptation immediately following an ideological challenge and is likely the result of representatives aligning themselves more consistently with the party, perceiving that doing so will help their chances in the following election cycle, potentially by using party resources to ward off future competition during the invisible primary. Attention on the positions of Democratic

[218] As elsewhere in this thesis negative coefficients indicate leftward (liberal) movement, and positive coefficients indicate rightward (conservative) movement.

incumbents, regardless the direction of challenge, appears to align somewhat with more partisan consistency in roll-call voting. As with ideological challenges, these models are somewhat underpowered to make more concrete associations.

8.4 Discussion & Conclusion

The findings in this chapter underline the importance of understanding the heterogeneous effects that different types of primary election have for partisan polarization. In an analysis of one mechanism through which primaries may contribute to polarization, this chapter indicates that when primaries are factional and ideological, incumbents respond differently than when we consider the universe of all primaries. This finding aligns with other studies that argue for the importance of nuance and understanding of the dynamics of individual cases when analyzing primaries (Kamarck and Wallner 2018). In short, simply understanding the numbers of primaries is insufficient to understand their effects on incumbent representatives.

This chapter found considerable evidence of movement towards the ideological pole when members of parties' establishment or regular factions received a coordinated primary challenger with the support of the party's realigner faction (H2). Ideological challenges (H3) elicited more modest responses from representatives in both parties, indicating that not only the framing of challengers' campaigns but *who* in the party is offering support structures incumbents' responses. These findings show that representatives feel most threatened—or, at least, are most responsive to threats—when an opponent has the support of a coordinated alternative faction. The findings for H2 also indicate that the effect of even a single primary challenge can be long-lasting. Under the right conditions, primary challenges align with incumbent movement away from the political center which holds for nearly a decade.

In both H2 and H3, we observe stronger results for Republican than Democratic incumbents, with two likely explanations. First, the period of this study allows for many more Republican factional and ideological primaries to be observed over multiple congresses afterwards. Given that numbers of Democratic ideological and factional primaries only increased sharply from 2018 onwards (see chapter four), the lack of time since many of the events may hinder the observation of longer-term Democratic adaptation. In contrast, Republican primaries became more factional and ideological from 2010 onwards, giving a longer period of data across which to observe these trends. The Republican Party experienced a deep intra-party cleavage for more of this period. Not unrelatedly, the Republican Party has moved further to the right than the Democratic Party has to the left in terms of roll-call voting in

Congress, the dependent variable in these models. Consequently, we see more substantive and significant results in the two key hypotheses of this chapter for the Republican Party.

Beyond the limitations of time and data, the partisan asymmetry in these findings may also speak to the dynamics of competition identified in the previous chapter. As discussed, reactionary Republicans were comparatively willing to challenge establishment candidates across safe and competitive districts. In contrast, progressive Democrats focused their attention on districts that were very blue and so did not pose a threat of loss in the general election. This asymmetry may have contributed to more adaptation by Republican incumbents, believing they had more to fear from non-alignment with their primary constituency or for not appearing as a sufficiently consistent partisan. Democrats were therefore likely better able to gauge whether a progressive challenge was likely, whereas Republican threats appeared more universal. Other data show that Republican partisan identifiers are less tolerant of positional heterogeneity among elites (Dunn 2021; Pew Research Center 2021), potentially serving as a further source of adaptation compared to Democratic representatives. As elsewhere, this finding likely links to intrinsic differences in the coalitions and organizational structures of the two major parties (Grossmann and Hopkins 2016).

Meyer (2021b) finds that incumbent members do not wait until the following congress to adapt their roll-call behavior. These results find limited evidence of adaptation in the congress in which a representative is challenged, especially compared to the amount of movement in subsequent congresses. This may be a problem with aggregation, with these results shown as the position across an entire congress. Incumbents usually become aware of a potential primary challenge around twelve months into a congress, meaning around half of the votes cast during this congress are taken when the incumbent does not know if a challenger will emerge. In addition, representatives win renomination with between four to nine months of a congress remaining.[219] A more precise analysis could test adaptation of roll-call voting before, during, and after a challenger emerges across the a congress, testing if representatives adopt more non-centrist positioning once challenged. One potential problem with this design is identifying when a challenger's status is 'known', with many challengers expected before they officially announce their campaigns, and others not taken seriously even after they do. Given the limited number of over-time data points derived from roll-call voting, I take an alternative approach to the question of within-election adaptation in the following chapter.

[219] Primary season runs from March to September of even years.

It is worth noting that the tests in this chapter represent the *hardest* case to observe adaptation. Roll-call votes are some of, if not *the*, most institutionally constrained behaviors of members of Congress. When casting votes, members face substantial pressure from party leadership, senior co-partisans and committee members, affiliated members of the party network, and (depending on their party status) even the president. Using roll-call voting is also likely the hardest test of movement available given the recent increases in party unity scores (Lesniewski and Kelly 2022) as a result of increasing institutional pressures to toe the party line (Mann and Ornstein 2012). If movement is identified in terms of roll-call voting, other, less institutionally constrained, measures of positional adaptation would likely be even more notable (Lee 2018).

The results in this chapter can also be considered the hardest test of positional adaptation because they include responses to all primary elections, without thresholding based on vote share or finances. Many incumbent challenges are no more than a token effort, receiving single-digit shares of the vote and spending no money in their campaigns. These are surely the least-likely cases to elicit incumbent adaptation. In the appendix, I repeat my analyses using the incumbent threshold of seventy-five percent of the vote, challenger threshold of five percent of the vote, and a financial threshold that the challenger files with the FEC. In most cases, and almost all that restricted on vote share, positional adaptation increased compared to the main results reported here.

These analyses do not test the full range of mechanisms whereby primaries may induce between-election adaptation. In this chapter I only test adaptation *after* a challenger emerges, with incumbents likely adapting their positions to *prevent* primary challenges on ideological or factional grounds before they emerge. Testing the *preventative effect* identified in the introduction requires additional data about candidates who do not emerge (Hall 2019; Thomsen 2017b). Representatives may also not need a primary challenge in their own district to induce adaptation. A *social effect* may also occur when incumbents observe co-partisans or colleagues from across the aisle defeated in ideological and factional primaries; this may be sufficient to cause them to adapt their positions out of a fear that they could be deselected next. Again, I do not test this effect given the necessity for additional qualitative data to identify adaptation due to social pressure. Both the preventative and social effects suggest that the tests conducted in this chapter likely *underestimate* the positional adaptation of representatives between elections due to ideological and factional primaries.

The findings in this chapter also pose a deeper question about *why* representatives perceive the need to adapt their positions. Given the limited selective effect of voters demonstrated in the previous chapter (especially in terms of deselection), why are incumbent representatives willing to adjust their positions? The answer likely comes from a combination of benefits derived from aligning with key "policy demanders" (Bawn et al. 2012) in the party network, and representatives'—potentially incorrect—perceptions about the positions and preferences of their primary electorates. Following a challenge on ideological or factional grounds, incumbents likely perceive that they were not sufficiently liberal or conservative to prevent a challenge from their ideological flank and make efforts to correct positionally.

This chapter showed that following factional primaries, incumbent representatives adapted their roll-call voting positions away from the political center. In ideological primaries, the size and significance of this effect was smaller and lasted for a shorter period. This between-election adaptative effect was not present when considering the universe of all primary challenges, as incumbent challenges on non-positional grounds—such as personal competence or following a scandal—did not induce positional responses from incumbents. The effect in both ideological and factional primaries was larger in the Republican Party, likely due to a combination of internal party dynamics and the period studied, in which the party experienced deeper and longer lasting internal factionalism. These findings run counter to the notion that "members die in their ideological boots" (Hall and Snyder 2015, 28), with evidence that representatives adjusted their roll-call positions when challenged away from the political center, to prevent future challenges or improve their performance through (perceived) increased congruence with their "primary constituency" (Fenno 1978). The greater movement of establishment-aligned representatives in factional primaries rather than all representatives in ideological primaries suggests that the between-election adaptation is particularly influential in moving relative moderates in Congress toward an ideological pole.

Though the overall contribution of member adaptation to partisan polarization has been shown to be smaller than effects such as member replacement (Theriault 2006), these findings indicate that incumbent movement following a factional primary challenge is a further contributor to increasing ideological distance between partisans in Congress. If all or most incumbents routinely receive ideological and factional primary challenges, Congress will likely continue to become more polarized, even if all these challengers lose. Though incumbent defeats in primaries of any kind remain rare, representatives appear particularly fearful of ideological and factional challenges, and adapt their roll-call voting behavior in future congresses when

they receive one. In this way, the between-election adaptative effect appears to contribute to polarization to a greater extent than the selective effect tested in the previous chapter. Put differently, incumbent representatives' responses to primaries are stronger than the effects emanating directly from the voters themselves. In this way, elites' perceptions about primaries may have caused them to "act in ways that brought about the sorts of changes they believed they had already seen" (Boatright 2013, 224). Having considered adaptation among incumbents across election cycles, I next test a third mechanism through which primaries may contribute to polarization: the movement of *all* primary candidates during the nomination phase of a single election cycle.

9 Within-Election Adaptative Effect: Do Primaries Induce Artificial Positioning?

Congressional candidates hew to the preferences of the primary constituency.

Brady, Han, and Pope[220]

As discussed, incumbent officeholders may move position between election cycles, but *all* primary candidates may adapt their positions away from the center during the nomination phase of a single election cycle. The theoretical framework for this chapter is based on the "strategic positioning dilemma" (Brady, Han, and Pope 2007), which contends that candidates must first satisfy an extreme selectorate to earn the nomination before facing a comparatively moderate general electorate. This chapter tests whether candidates communicate artificial or strategic positions during the nomination phase of the election cycle. If primaries cause candidates to adopt artificial or strategic positions during the nomination phase of the election and constrain winners from moderating afterwards by punishing inconsistent positions, then general election voters may be presented with artificially polarized choices.[221]

Some research finds that candidates move away from the center during the primary phase of an election cycle (Brady, Han, and Pope 2007; Burden 2001), but a systematic study of candidate positions remains lacking, in part due to the limited availability of positional time-series data of elected officials and losing candidates. Traditional ideal point estimates are only available for elected members of Congress (McCarty, Poole, and Rosenthal 2006) or aggregated across an entire election cycle (Bonica 2014). To fill this gap, I measure changes in candidate positions both during and after the primary using an original dataset of dynamic social media-based positions. Given the need for more granular positional data about candidates during an election cycle, I am unable to use my entire dataset to analyze within-election adaptation.[222] Instead, I analyze candidates' communication on Twitter across a single election cycle, using supervised machine learning (Goet 2019; J. Green et al. 2020) to identify the liberal–conservative axis of 2,500,000 tweets by 988 candidates in U.S. House primaries in 2020. I demonstrate the validity of this approach by correlating these positions with NOMINATE ($r>0.93$) where possible. Given the constraints on primary winners, who continue

[220] (Brady, Han, and Pope 2007, 80).
[221] Parts of this chapter originally are drawn from Cowburn and Sältzer (2021).
[222] This dataset was constructed using a subset of the original dataset introduced in chapter three. Additional clarification is provided about the data and method used in this chapter.

to face electoral pressure to maintain consistent positions, I test for artificial positioning during the primary by analyzing the behavior of *losers* (who no longer face electoral constraints) after their primary.

In this chapter I show that Democratic candidates who did not become the nominee moderated significantly following the primary, indicating strategic positioning for perceived electoral benefit and that the presence of a primary, especially an ideological or factional primary, induced artificial positioning. Among Republicans, I find no such effect. As expected, winners in both parties did not moderate, indicating that the presence of primary elections may have presented Democratic general election voters with candidates further to the left than they would otherwise have had absent the presence of a contested primary, as a within-election polarizing effect of primary elections in at least some cases.

9.1 Communication & Positional Change

To shape perceptions, candidates send signals to voters and other actors within the party. Based on the assumption that voting is sincere, legislators express preferences through roll-call voting (Canes-Wrone, Brady, and Cogan 2002). Other candidates need to make alternative credible claims of positions, such as by differentiating themselves through their policies, behavior, or language. Intra-party positioning could include drawing support from aligned allies, attacking a primary opponent on ideological grounds, or associating with an ideologically oriented faction. These types of differentiation are therefore explicit, making them difficult to change during an election cycle. Perceptions of candidates' policy positions may also be based on information obtained prior to the election, giving campaigns limited ability to shift over time. Candidates who continue to face electoral pressures may also perceive strategic disadvantages of moving positions, such as being labeled as inconsistent or accused of 'flip-flopping,' which voters are liable to punish (DeBacker 2008).

The divergence in preferences between primary and general election voters has been theorized as a strategic positioning dilemma for candidates in two-stage elections, which candidates resolved by aligning with the primary selectorate (Brady, Han, and Pope 2007). Burden (2001) finds that candidates take more extreme positions during primary than general elections, and further suggests they may feel greater pressure to align ideologically during the primary than the general election as voters use different criteria to choose candidates, where ideological proximity is more important to the primary selectorate (Burden 2004, 213). Under the assumptions of the strategic positioning dilemma, we should expect candidates to adopt non-median positions during the primary, with limited moderation of nominees in general

election campaigns due to the electoral penalties attached to moving position. For this reason, I focus on losers' positional adaptation after their primary defeat (once electoral incentives are removed) to empirically test whether candidates adopted artificial positions during the primary.

Whereas policy preferences and other forms of intra-party alignment are largely static, political communication—including press statements, interviews, and social media activity—allows more flexibility in position, enabling candidates not only to alter their policy positions but also to change emphasis (T. M. Meyer and Wagner 2019). Candidates can therefore reposition not only by changing their stands on issues, but also by changing the issues that they discuss (Budge and Fairlie 1983). For example, a candidate who ran on an anti-abortion platform in the primary is unlikely to advocate pro-choice policies in the general election campaign, as this would not be perceived as credible by voters or other groups in their party. Instead, they may simply stop talking about or deprioritize the issue and emphasize topics with broader appeals.

Given the relative paucity of constraints on social media posts, I assume that language used reflects candidates' preferences. Candidates who present themselves away from the center in their policy positions are also non-centrist in their communication, demonstrated here by the alignment of positions derived from voting behavior and social media communication for candidates who ever served in Congress (see Figure 9.2). Candidates who lose a primary election are subsequently able to reveal their 'genuine' preferences through social media communication. Most losing candidates did not run for alternative public office following their defeat. Though most—not all—remained active partisans, relatively few faced continued deliberation or public votes on their positions. Some candidates ran for or continued to hold local public office, but the vast majority did not.

9.2 Measuring Positions During a Campaign

Answering the question of whether primaries induce non-centrist communication within an election cycle requires positions *over time*. The most common technique of estimating ideal points is the analysis of roll-call votes (McCarty, Poole, and Rosenthal 2006; Poole and Rosenthal 1985). Unfortunately, these data are only available for officeholders, and most candidates who compete in primaries do not win office. Alternative scaling measures applicable to non-officeholders do exist, most notably campaign finance scores (CFscores) (Bonica 2014) discussed previously in this thesis. CFscores do not capture the over-time variation required,

meaning I cannot independently scale candidate positions during the primary and general election phases with these data.

An alternative measure placing candidates and officeholders on the same dimension is the scaling of social media networks. Twitter has developed into an important campaign tool for parties and politicians that has gained substantial scholarly attention (Barberá 2015; Cowburn and Oswald 2020; Russell 2018). Barberá (2015) uses the revealed preferences framework, developed for the analysis of roll-call votes, on the act of following other accounts on Twitter, with great predictive value for positions obtained through expert surveys. Using the follower network as an indicator for preferences has two disadvantages for this chapter: First, follower networks are largely static and do not allow for time-based comparisons, and second, they can hardly be considered signals to voters or policy demanders. Though Twitter networks enable the placement of candidates and officeholders on a common scale, a more granular approach is necessary for this chapter.

9.2.1 Text Analysis

Social media allows political elites to communicate directly with potential voters in public. Tweets have become part of the news cycle, and Twitter is now a rich source of information about the thematic emphases of politicians and their positions. Of all political actions, social media communication appears the least constrained by political institutional features. It does not suffer from formal agenda setting, is unlimited in dimensionality and emphasis, and can be used to proclaim positions on diverse subjects including campaign events, policy agenda items, or sports team preferences.

I therefore analyze text on Twitter to position candidates (Boireau 2014; Ceron 2016; Sältzer 2020) over time. Identifying positions from text can be separated into unsupervised and supervised approaches. The latter includes methods such as Wordfish, which enables comparisons of election manifestos (Slapin and Proksch 2008) and political speeches (Lauderdale and Herzog 2016). One challenge of these approaches is a lack of agreement that the extracted dimensions relate to political ideology. Supervised approaches ensure correct understanding of the underlying dimension but require 'training data' to teach algorithms which text aligns with various positions. Since ideology is continuous rather than categorical, approaches such as Wordscores (Laver, Benoit, and Garry 2003) use scaling, but set fixed endpoints using anchor documents. Similar approaches have also been applied to newspapers (Gentzkow and Shapiro 2010) and television channels (Martin and McCrain 2019). To identify

the dimension of partisan conflict, Goet (2019) and Green et al. (2020) use supervised learning on party labels to identify positions. I follow their approach here.

9.2.2 Data

I collected the timelines of social media accounts of candidates running as a Republican or Democrat in a contested primary for the U.S. House of Representatives in 2020. In line with the other chapters in this thesis, I consider primaries as contested when two same-party candidates feature on a ballot. Twitter accounts were collected based on a search list created by sourcing Ballotpedia. I restricted the sample to candidates in contested primaries with identifiable Twitter accounts and Ballotpedia entries, and who tweeted regularly enough to be positioned both before and after their primary election date. I checked for anomalies in these data, particularly by analyzing outliers in detail. I include positional data from 988 of the total of 1,772 candidates that stood in a contested primary as a Democrat or Republican in the 2020 election cycle. The sample is heavily skewed towards candidates with a realistic chance of winning the nomination, where a substantial proportion of excluded candidates did not raise money or actively campaign and received single-digit vote shares.[223]

Accounts were cross-referenced against the manually collected candidate data used for the other chapters of this thesis. Candidate data was compiled throughout the 2020 primary cycle using data from state's websites and results in *The New York Times*. Tweets were collected using the Twitter API implementation rtweet (Kearney 2018) for all candidates with Twitter accounts in June 2020. Having gathered the list of accounts in June, I constructed the dataset between June 2020 and March 2021, removing all URLs, lower casing, and cleaning for HTML code (such as emojis). I removed names, punctuation, mentions and numbers. I used Quanteda's (Benoit et al. 2018) default English stopword lists and removed all terms used by less than 100 accounts.

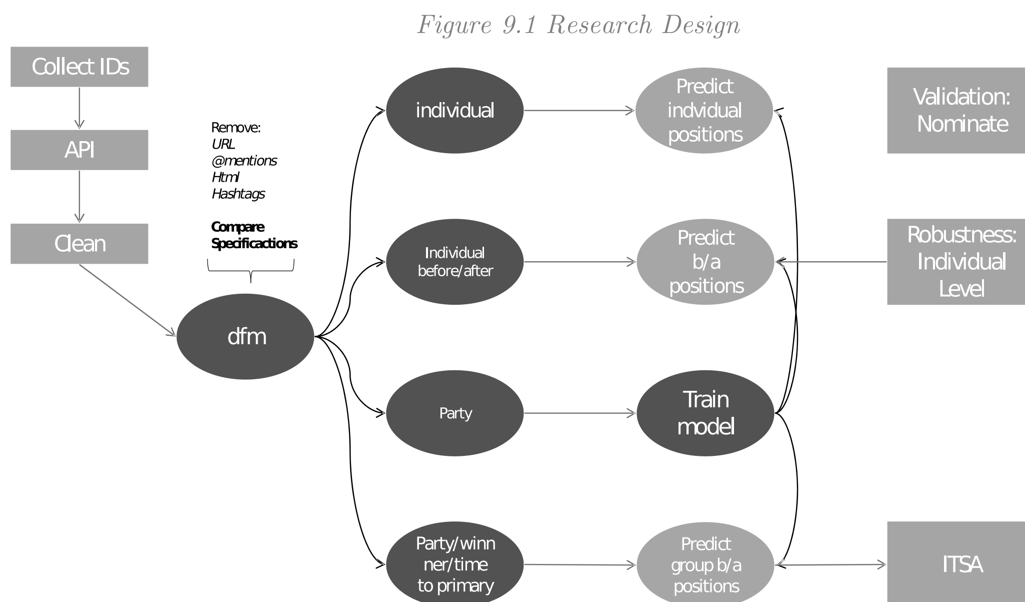
9.2.3 Positions from Twitter Text

Given the somewhat more complex research design of this chapter, I present the approach graphically in Figure 9.1. Following Goet (2019) and Green et al. (2020), I use a supervised machine learning model to estimate candidates' positions in Euclidean space (Laver, Benoit, and Garry 2003; Slapin and Proksch 2008). I classify each candidate based on their party identification using a Naïve Bayes classifier. This model uses a bag-of-words approach to

[223] As in the other chapters of this thesis, the data include candidates from forty-nine states, as Louisiana does not hold congressional primaries. Given only eight districts in California or Washington featured same-party (Democratic) general elections, I include these states. I repeat the main analysis without these districts in the appendix

estimate the party membership of each candidate. Each word in the dataset gets a value of partisanship which can then be applied to any document to score how 'partisan' it is. Traditional classifiers use binary classification to estimate the outcome. To produce a continuous measure, I use the (normalized) relative log-likelihood, giving a score that a document has a certain partisan 'identity'. In the case of individual positions (as in the validation) this 'document' is all tweets by a candidate in any given period.

Figure 9.1 Research Design



One disadvantage of this approach is the absence of confidence intervals. As the model estimates the likelihood of a text's partisanship, there is no natural interpretation of uncertainty. It is, however, possible to quantify how dependent the results are on specific cases and features, for example, if a candidate uses specific terminology in a manner distinct from their co-partisans and changes the meaning. To account for this possibility, I compute bootstrapped positions. Instead of computing a single Naïve Bayes model, I resample all data by drawing ninety percent of them four hundred times, rerunning the model, and storing the term-weights. When predicting the positions of documents, I again predict four hundred positions, computing the standard deviation to get an approximation of error. The result is normally distributed positions around a mean, quantifying potential uncertainty.

To apply the data to the question of within-election adaptation, I compute positions of candidates at different time points, before and after their respective primaries. I use a three-step process: deriving the main dimension of political conflict, validating the underlying text model, and aggregating the data at various levels. I first extract the dimension that best explains differences between the parties to identify which terms are most predictive for partisanship and then aggregate the terms' relative weights across multiple levels, shown in

Figure 9.1. Having trained the model at the individual level, I then apply the weights of these terms to tweets aggregated at the candidate level, the candidate level before and after the primary, and the party level over time (weeks).

Challenges of this approach include variation in the quantity of candidate-level data, with some candidates rarely tweeting and others so active that their tweets are capped by the API rate limitations Twitter imposes (3200 tweets). Perhaps more importantly, the dataset includes a combination of political and apolitical tweets that do not indicate position. This mix of content has the potential to cause problems when scaling positions, as higher rates of non-political tweets could result in candidates being interpreted as moving toward the center (Grimmer and Stewart 2013). I deal with this problem explicitly by also applying the model to a subset of policy-related tweets only.

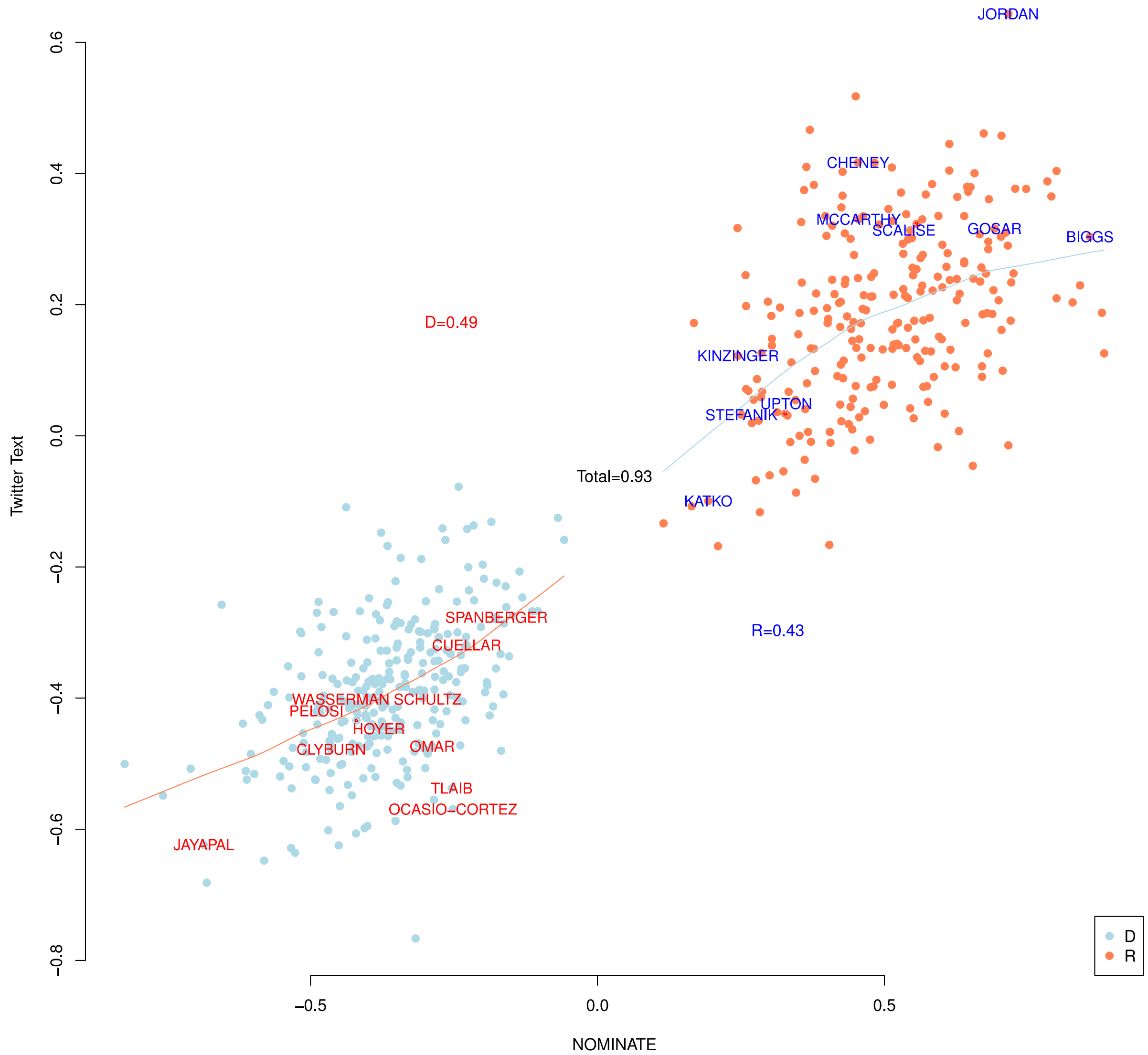
9.2.4 Validation

Introducing a new measurement for a latent construct requires validation, I therefore test the scores' predictive validity against other known estimates of candidate positioning to demonstrate the external validity of the measure. Given the previously identified absence of such a measure for all candidates, I compare results with a subset of the data. The most widely used measure is NOMINATE (Poole and Rosenthal 1985), based on members' roll-call voting in Congress. Of course, this measure is only available for members who have ever served in Congress.[224] If these members are positioned in a meaningful way that captures the underlying dimension, other candidates placed on the same dimension should also align. In total, I validate the measure using over two million Tweets by 518 members of Congress.

Figure 9.2 shows this validation, with NOMINATE scores on the x-axis. The y-axis shows the average positions predicted by Twitter communication over the entire electoral cycle. To increase the number of data points against which to validate, and to give the model a hard test, I also include senators and incumbent representatives who retired in 2020 in this plot. The model was not trained on these members' tweets, providing an ideal independent corpus against which to validate.[225] Given issues of data availability, I limit members of Congress in this plot to those with one thousand tokens (words) identified and scaled in the dataset; this step excluded nine members who rarely tweeted.

[224] CFscores for the 2020 cycle are not yet published at the time of writing.
[225] Senators' data are only used for validation and do not feature in the main analyses.

Figure 9.2 Validation Against NOMINATE



The overall correlation is 0.93, with higher intra-party correlations than alternative recognized scaling measures such as follower network scores (Barberá 2015) or CFscores (see Barber 2022). I also demonstrate semantic validity by labeling some notable representatives' positions. In both parties, representatives who are commonly perceived as 'moderates'—including Abigail Spanberger, Henry Cuellar, John Katko, and Fred Upton—are also moderate by this measure. Similarly, representatives such as Pramila Jayapal and Jim Jordan, viewed as highly liberal and conservative respectively, are away from the center on this scale. In addition, Democratic representatives such as Alexandria Ocasio-Cortez and Rashida Tlaib, who are incorrectly positioned as moderates by NOMINATE due to their opposition to some Democratic bills,[226] are positioned as more liberal under this measure. These correlations give confidence that the measure aligns with the liberal–conservative dimension structuring roll-

[226] See Lewis (2022) for details.

call voting behavior, and suggest that in some cases where they differ, this measure may even serve as a more accurate proxy for ideology than NOMINATE.

9.2.5 Content of 'Ideology'

What does the dimension measured by Twitter communication mean? Though I obtain some predictive validity by comparing the positions generated with roll-call votes, I also need to qualify the analysis by understanding what language identifies the dimension to demonstrate the internal validity of the measure. To do so, I interpret influential words that produce scores further from the center. The measure can be said to have semantic validity if these scores are associated with parties' ideological positions, campaign rhetoric, or policy issues.

Figure 9.3 Validation with Terms

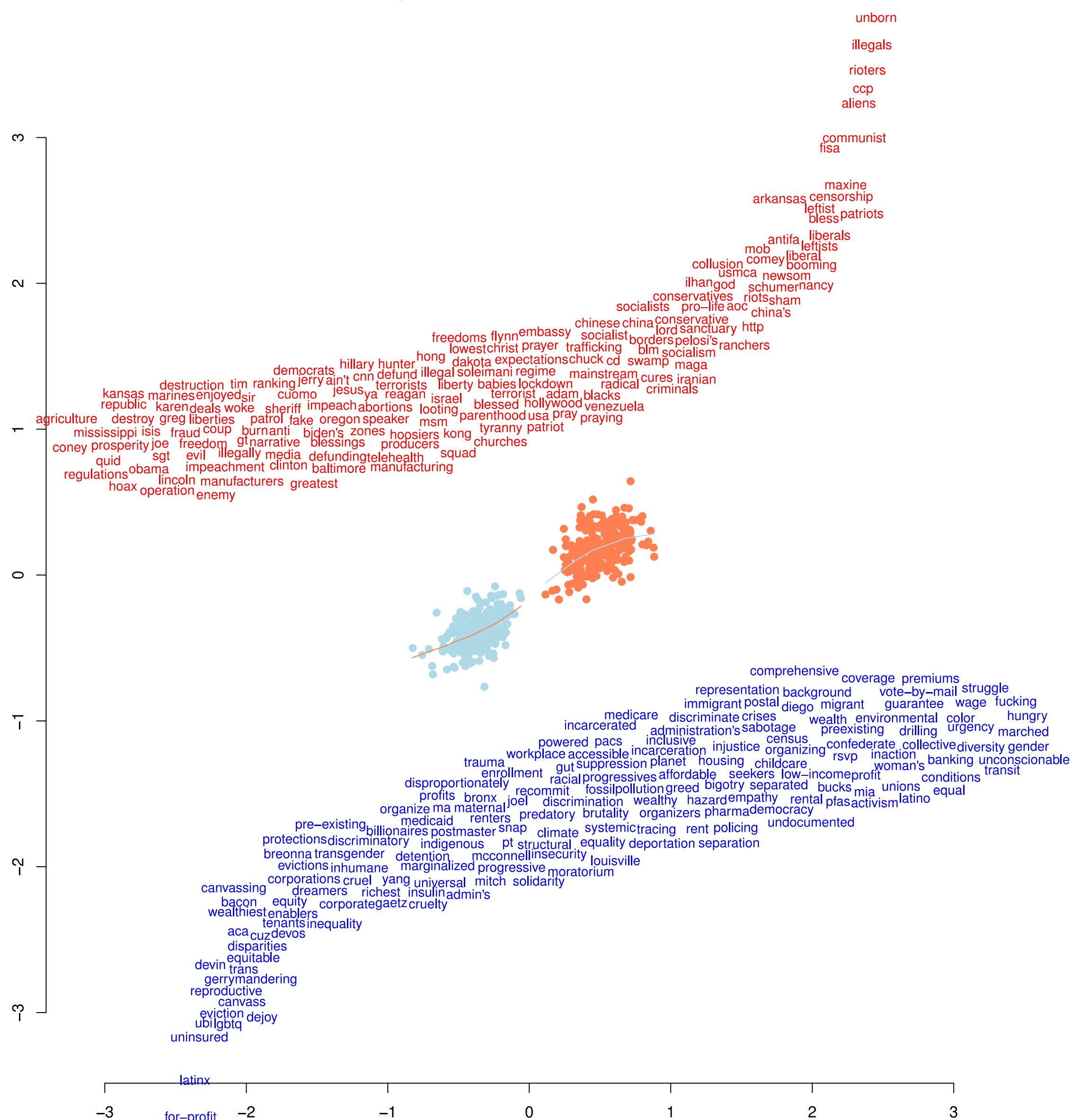


Figure 9.3 shows the terms for each end of the dimension that occur more than one thousand times in the entire corpus of tweets, surrounding the positions estimated in Figure 9.2. The lower (higher) the position of a word on the y-axis, the more indicative it is for the

Democratic (Republican) Party and contributes to a score further to the left (right). Accordingly, representatives that tweet a lot about "illegals" and "rioters" receive scores further to the right than those who tweet about more moderate identifying terms such as "manufacturers" or "regulations". Terms' positions on the x-axis are for presentation purposes only and have no substantive meaning.

These terms can broadly be grouped into three categories: policy-related, own-party rhetoric, and negative terms. Policy-related terms to the right included "illegals", "censorship", and "unborn". Republican own-party rhetorical terms included "patriots" and "conservatives". The terms "rioters", "communist", and "leftist" were used by Republican candidates to talk negatively about the Democratic Party and their supporters and were similarly scored to the right. Liberal policy-related terms included "uninsured", "ubi", and "for-profit". Democratic own-party rhetorical terms included "canvass" and "progressive", and terms such as "lgbtq" and "trans" referred to demographic groups who favor the party. The terms "inhumane" and "cruelty" were negative liberal identifiers.

9.2.6 Party Level Analysis

Following validation, I trust the model to infer positions. In the first analysis, I produce a model at the party level and focus on dynamics over time. To test the effect of primaries, I am not interested in the *relative* time to or since candidates' respective primaries. Because states hold nomination contests on different dates, I center the time around each intra-party election, using a time-to-primary variable for each tweet as weeks before or after the primary. I then aggregate at the following levels: party, whether the candidate won their primary, and time-to-primary (weeks). Each observation is the aggregate of terms used by members of a party who won or lost the nomination at the same relative time before or after their primary.[227]

9.2.7 Robustness

To test the robustness of the party level findings, I also analyze the effect on the individual level. I do not have enough tweets at the individual level to reliably compute positions in the same density as at the party level (the number of candidates positioned is also reduced from 988 to 886) meaning I instead aggregate candidates' positions before and after their primary to enable the direct comparison of candidate-level movement. In this model, I control for incumbency, given that incumbents may face additional pressures and incentives to maintain their positions: they likely have political records to uphold, and voters and opposition

[227] As a placebo test, I also randomized this date. See appendix for details.

candidates alike can hold them accountable to these records. Given that district partisanship influences positional incentives in primary and general elections, I control using *The Cook Political Report*'s (2017) partisan voting index (PVI), rescaled to a +/− Republican lean.[228]

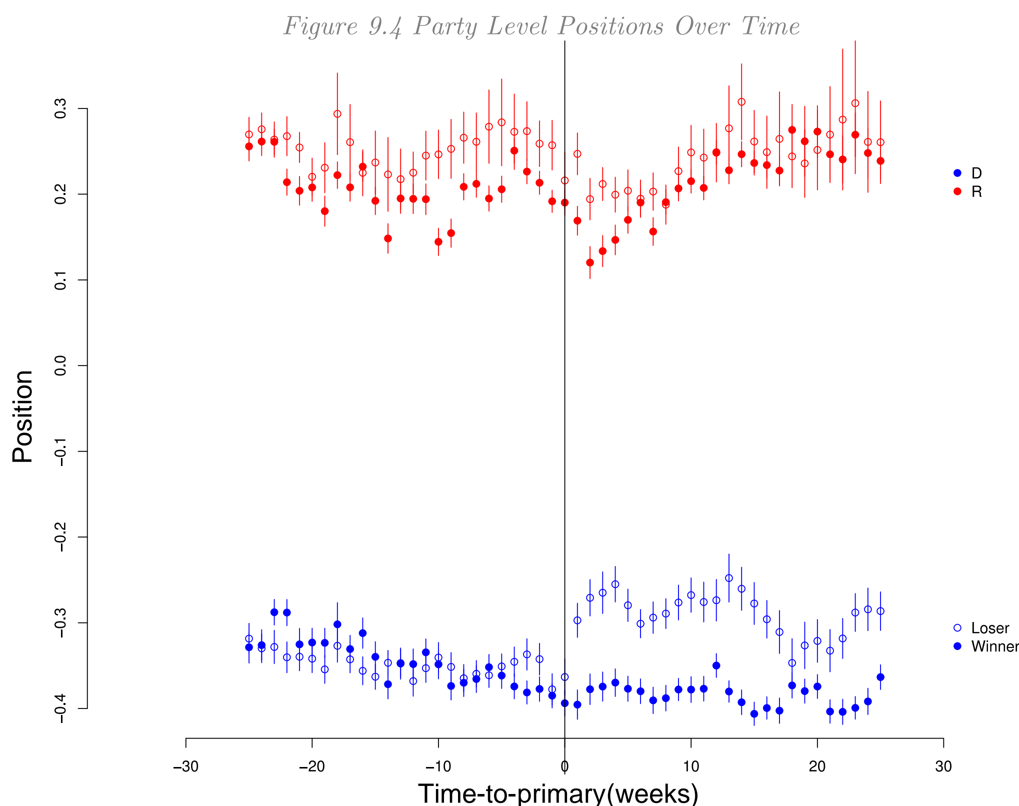
9.3 Are Candidates More 'Extreme' During the Nomination?

As described above, I first analyze within-election adaptation at the party level, where I can compute a complete time series of weekly positions for winners and losers in both parties. To prevent the reporting of false moderation due to a shift in saliency from political to non-political tweets following the primary (Grimmer and Stewart 2013), I repeat this analysis on policy-related tweets *only*. I then test on the individual level to exclude the possibility of selection biases and ecological fallacy, with candidates' movement after the primary election as the dependent variable. Finally, I test the individual level effect in ideological and factional primaries only.

9.3.1 Shifting after the Primary: The Party Perspective

Figure 9.4 shows the positions of winning and losing candidates in both parties as groups aggregated by week to or from their respective primary. As the figure indicates, Democratic candidates who do not become the nominee shift their position *towards the center* directly after their primary. Republican losers do not moderate following primary defeats.

Figure 9.4 Party Level Positions Over Time



[228] I repeat this analysis without controls in the appendix; the results are unchanged.

To test the significance of this effect, I run an interrupted time series (ITS) regression with the specification:

$$Y_t = \beta_0 + \beta_1 T_t + \beta_2 X_t + \beta_3 X_t T_t + \beta_4 Z + \beta_5 Z T_t + \beta_6 Z X_t + \beta_7 Z X_t T_t + \varepsilon_t$$

Where Y_t is candidate position Y measured at week t, T_t is the time since the start of the study, X_t is a dummy (indicator) variable representing the intervention, the primary election, where pre-intervention observations take the value zero and post-intervention the value one. $X_t T_t$ is the interaction term between post-intervention and time, meaning β_2 gives the immediate change following the primary and β_3 gives the ongoing effect on *all* observations. Z is the treatment variable, which takes the value one if treated and zero if untreated. Given that moderation among losing candidates is expected, I consider losing the primary election to be the treatment, meaning primary winners form the control group. Coefficients β_4 to β_7 are the same as β_0 to β_3 with the interaction for treatment, meaning β_6 gives the immediate change among treated candidates following the primary and β_7 gives the ongoing change following the primary. I expect moderation from losing candidates immediately after they lose the primary, meaning β_6 is the main object of interest here. The results are presented in Table 9.1, with positive coefficients indicating rightward positioning and negative coefficients indicating leftward positioning.

Table 9.1 Interrupted Time Series (ITS) Regression Results

	Democratic	Republican
Time (T_t)	–0.003***	–0.001***
	(0.000)	(0.001)
Post-Primary (X_t)	0.009	–0.044***
	(0.009)	(0.014)
Post-Primary # Time ($X_t T_t$)	0.003***	0.007***
	(0.001)	(0.001)
Loser (Z)	0.025***	0.064***
	(0.009)	(0.013)
Loser # Time ($Z T_t$)	0.002***	0.001
	(0.001)	(0.001)
Loser # Post-Primary ($Z X_t$)	0.084***	–0.009
	(0.013)	(0.020)
Loser # Post-Primary # Time ($Z X_t T_t$)	–0.003***	–0.003*
	(0.001)	(0.001)
Constant	–0.387***	0.190***
	(0.006)	(0.010)
Observations	102	102
R^2	0.846	0.608
Adjusted R^2	0.834	0.579
Residual Std. Error (df = 94)	0.016	0.025
F Statistic (df = 7;94)	73.747***	20.851***

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

In line with the visual trend depicted in Figure 9.4, Table 9.1 shows that Democratic losers became significantly more moderate immediately after they lost the primary election

(ZX_t). Moderation among Democratic losers is substantively significant such that the average position of all Democratic candidates is slightly to the right following the primary (X_t), though this difference is not statistically significant. Losing Democratic candidates are significantly more moderate than winners over the whole period (Z) because of their post-primary moderation, with no positional differences between the groups prior to the primary, as shown in Figure 9.4. All other Democratic coefficients are substantively close to zero.

For Republican losers, Table 9.1 indicates no significant moderation following primary defeats (ZX_t). Rather than being conditioned by winning the primary, it appears that all Republican candidates moderate slightly after the primary (X_t) then quickly move back towards their pre-primary positions in subsequent weeks (X_tT_t). Indeed, Figure 9.4 indicates that it is Republican winners rather than losers who moderate in the weeks immediately after their primary. Across the whole period, losing Republican primary candidates are consistently further to the right than winners (Z). All other coefficients are substantively close to zero.

Unsurprisingly, partisanship—shown here in the form of the constant term—is the strongest predictor of position for candidates in both parties. At the party level I demonstrate a clear moderating effect among Democratic candidates who lose their primary *only*.

9.3.2 Robustness to the Changing Salience of Non-Political Tweets

One identifiable problem of ideal point estimation over time is the changing saliency of features that contribute to the dimension (Grimmer and Stewart 2013). The appearance of moderation may stem from movement toward more centrist content—ideological moderation—or from a reduction of policy-related or political content. Accordingly, it might be that candidates are merely tweeting less about politics and turn their account into a private platform after they lose a primary rather than continuing to discuss politics. Given the main finding, this may be of particular concern for Democratic candidates.

To ensure the robustness of the approach to this problem, I applied the same method to a subset of explicitly policy-related tweets. To do so, I hand-coded a random set of 1,200 tweets using three categories: political (y/n), policy-related (y/n), policy area (using policy fields established in the Comparative Agendas Project). Though the sample was too small to analyze policy areas individually, roughly half of the tweets in the sample were policy related. I then trained a classifier for these tweets, using an English-language Bidirectional Encoder Representations from Transformers (BERT) model which achieves a satisfactory F1 score of 0.8. I use this model to predict whether all 2,500,000 tweets in the original sample were policy-

related (again, roughly half were) and estimate positions.[229] I then re-ran the original analysis on this subset. The results are shown in Table 9.2 and align with the main finding, with substantively significant moderation among Democratic losers after the primary (ZX_t). The result of this additional analysis gives confidence that the main results are not an artifact of the changing saliency of policy-related tweets by Democrats after primary defeats and are instead evidence of positional adaptation by losing candidates.

Table 9.2 ITS Results: Policy Tweets Only

	Democratic	Republican
Time (T_t)	–0.002***	–0.000
	(0.001)	(0.001)
Post-Primary (X_t)	0.000	–0.026***
	(0.001)	(0.020)
Post-Primary # Time (X_tT_t)	0.000	0.004***
	(0.001)	(0.001)
Loser (Z)	–0.003	0.033***
	(0.009)	(0.019)
Loser # Time (ZT_t)	0.002***	0.000
	(0.001)	(0.001)
Loser # Post-Primary (ZX_t)	0.041***	0.001
	(0.014)	(0.028)
Loser # Post-Primary # Time (ZX_tT_t)	–0.002***	–0.002
	(0.001)	(0.002)
Constant	–0.453***	0.119***
	(0.007)	(0.013)
Observations	102	102
R^2	0.621	0.222
Adjusted R^2	0.593	0.164
Residual Std. Error (df = 94)	0.018	0.035
F Statistic (df = 7;94)	22.008***	2.827***

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

9.3.3 Individual Level Robustness

To avoid the ecological fallacy, I also test effects at the individual level. Figure 9.5 shows the individual-level results. These models use the difference (movement) in candidates' positions before and after their primary as the dependent variable, where positive coefficients indicate rightward movement and negative coefficients indicate leftward movement. I test using two dependent variables: absolute movement and a variable of *significant* movement. Significant movement takes the value 1 if a candidate moves rightward three standard error confidence intervals and the value –1 if a candidate moves left to the same degree.

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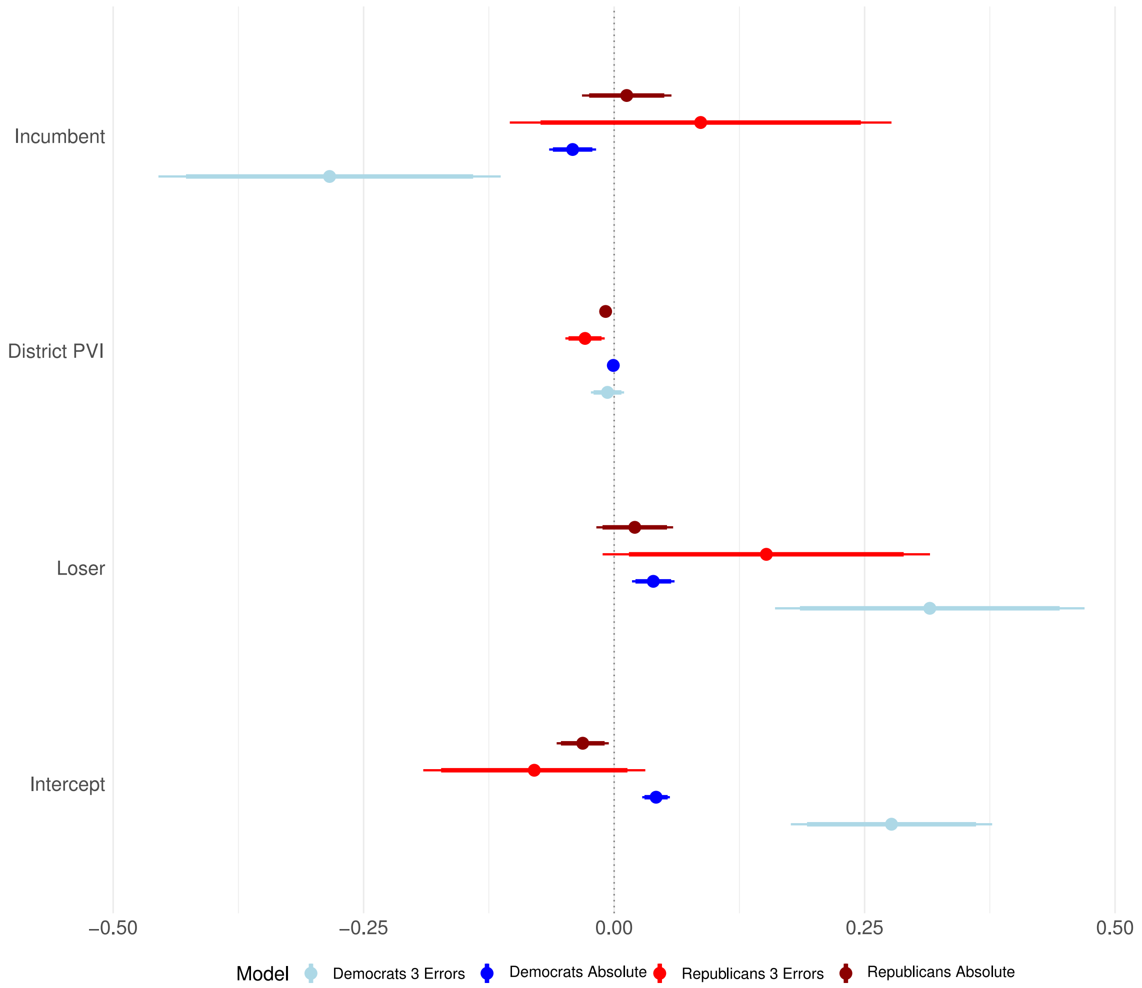
[229] I repeated this process with political (y/n). Because roughly ninety percent of tweets were coded as political, this variable had limited analytical application.

Figure 9.5 Individual Level Movement



In line with the party-level findings, Democratic losers took more moderate positions after the primary in both individual level models, providing further confidence in the party-level findings. Republican losers also moved slightly to the right, but the effect was not statistically significant. As in the party level model, partisanship—the constant—indicates moderation among all candidates at the individual level following the primary. Democratic incumbents moved slightly to the left at the individual level, with no significant effect among Republicans. The main finding of this chapter, that Democratic losers moderate after the primary, remains present in both models. District partisanship had no relationship to Democratic positioning and a small but significant association for Republicans, who took less-conservative positions in districts which are less favored for the party.

This relationship can be further demonstrated using a two-way fixed effects model, with the results presented in Table 9.3. Losing is again coded as the treatment variable and time is constructed as before or after the primary. The interaction between losing the primary and post-primary speaks further to the robustness of the moderation among Democratic losers when they are defeated in a primary.

Table 9.3 Individual Fixed Effects: All Primaries

	Democratic Base	Democratic Controls	Republican Base	Republican Controls
Loser	0.011	0.010	0.026	0.008
	(0.015)	(0.016)	(0.020)	(0.020)
Post-Primary	–0.022***	–0.022***	–0.046***	–0.046***
	(0.007)	(0.007)	(0.014)	(0.014)
	(0.000)	(0.000)	(0.000)	(0.000)
Loser # Post-Primary	0.062***	0.062***	–0.001	–0.001
	(0.011)	(0.011)	(0.022)	(0.022)
Relative PVI		–0.001***		0.001
		(0.000)		(0.001)
Incumbency		–0.019		–0.072***
		(0.018)		(0.024)
Constant	–0.362***	–0.348***	0.206***	0.226***
	(0.010)	(0.012)	(0.014)	(0.015)
Observations	682	682	566	566
Number of ID	341	341	283	283

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

9.3.4 Candidate Positioning in Ideological & Factional Primaries

I repeat the above fixed effects analysis conducted at the individual level for candidates who lose factional and ideological primaries. Table 9.4 shows the results using ideological primaries and Table 9.5 shows the results for factional primaries. The main finding that Democratic losers became more moderate after defeats holds in both ideological and factional primaries.[230] This finding indicates that candidates in these contests specifically were taking artificially extreme positions during their primaries. These data indicate that ideological and factional primaries were the contests in which Democratic candidates adopted artificial positions during the nomination process. As in the previous findings, Republican candidates did not move significantly even in these specific types of primaries.

Table 9.4 Individual Fixed Effects: Ideological Primaries

	Democratic Base	Democratic Controls	Republican Base	Republican Controls
Ideology Loser	–0.012	–0.021	0.022	0.012
	(0.017)	(0.018)	(0.023)	(0.023)
Post-Primary	–0.001	–0.001	-0.053***	–0.053***
	(0.007)	(0.007)	(0.013)	(0.013)
Ideology Loser # Post-Primary	0.039***	0.039***	0.019	0.019
	(0.013)	(0.013)	(0.025)	(0.025)
Relative PVI		–0.001**		0.001
		(0.000)		(0.001)
Incumbency		–0.046***		–0.070***
		(0.017)		(0.023)
Constant	–0.352***	–0.331***	0.213***	0.226***
	(0.009)	(0.011)	(0.011)	(0.012)
Observations	682	682	566	566
Number of candidates	341	341	283	283

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

[230] Though are only significant at p<0.1 in the case of factional primaries.

Table 9.5 Individual Fixed Effects: Factional Primaries

	Democratic Base	Democratic Controls	Republican Base	Republican Controls
Factional Loser	0.004	0.018	0.061***	0.051**
	(0.019)	(0.020)	(0.022)	(0.023)
Post-Primary	0.006	0.006	–0.042***	–0.042***
	(0.007)	(0.007)	(0.013)	(0.013)
Factional Loser # Post-Primary	0.029*	0.029*	-0.014	–0.014
	(0.016)	(0.016)	(0.027)	(0.027)
Relative PVI		–0.001***		0.000
		(0.000)		(0.001)
Incumbent		–0.034**		–0.063***
		(0.016)		(0.024)
Constant	–0.357***	–0.343***	0.203***	0.215***
	(0.009)	(0.010)	(0.012)	(0.012)
Observations	682	682	566	566
Number of Candidates	341	341	283	283

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

9.4 Discussion & Conclusion

This chapter presented evidence of the within-election adaptative effect, with results indicating that primaries induced artificial position-taking among Democratic candidates only. I interpret these findings as support for the strategic positioning dilemma among Democratic candidates, who adopted artificial positions during the primary, which they did not continue to hold once absent the (perceived) incentives to do so. For Republican candidates, I find no evidence of artificial positioning or strategic adaptation, suggesting that communication during the primary was done out of conviction rather than for perceived advantage. Absent electoral incentives, losing Republican primary candidates continued to communicate highly conservative positions. Given that Democratic winners did not moderate following their primary, the presence of a contested nomination can be said to have contributed to general election voters' polarized choices in November. This within-election adaptative effect is particularly pronounced in ideological and factional primaries.

Among Democrats, these findings align with the expectations of the strategic positioning dilemma. The moderation of losing candidates after the primary indicates the theorized effect that intra-party competition induces artificial extremism during the nomination. Grossmann and Hopkins (2016) find that the Democratic Party is a diverse coalition of group-oriented actors. Rather than being defined by ideological conflict, candidates advocate for various groups which are understood primarily in terms of demographics and identity. Consequently, Democratic candidates are less frequently ideological purists. If these candidates perceive that important policy demanders are to their left, they may have additional incentives to adopt artificial positions during the nomination

For Republicans, these results align with scholarship that positions candidates for Congress as more extreme, or at least more ideologically consistent, than other groups and voters in their party (Bafumi and Herron 2010; Barber 2016). These results run counter to the expectations of the strategic positioning dilemma. Candidates in the Republican Party take non-centrist positions out of conviction both during and after the primary, suggesting that losing a primary has no effect on positioning. That losing Republican candidates continue to communicate these positions after the primary appears intuitive, as research indicates that Republican elites are more ideologically motivated and cohesive than their Democratic counterparts (Grossmann and Hopkins 2016). This finding also aligns with scholarship indicating that the Republican Party has moved sharply rightward in recent years (Hacker and Pierson 2006; Mann and Ornstein 2012; Theriault 2013), meaning losing primary candidates have less incentive to moderate to help their future career in the party.

Republican partisans are also less tolerant of elite positional heterogeneity (Dunn 2021). Party elites and other actors in the formal party organization may therefore be more disposed to recruit loyal (or sincere) party believers who hold consistent positions away from the political center. Given the (perceived) position of primary voters and policy demanders in the party, moderate Republicans may simply decide that running for Congress is not worthwhile (Thomsen 2017b). Consequently, the strategic positioning dilemma may no longer apply to the modern Republican Party, as the only candidates running are located so firmly on the right of the political spectrum that they perceive no need to adjust position during a primary. As discussed in chapter five, the institutional biases in general elections—including aggressive Republican gerrymandering in the previous redistricting cycle and the electorally inefficient clustering of Democratic voters in urban districts—may also have furthered a perception among Republican policy demanders and primary voters that candidates on the right of the political spectrum are electorally viable.

Though progressives have made gains in recent years, the Democratic Party remains dominated by the establishment faction, meaning losing candidates who want to continue a career in the party are wise to moderate to appeal to like-minded individuals. Empirical studies indicate that establishment candidates perform comparatively better in Democratic primaries (Conroy, Rakich, and Nguyen 2018; Kamarck, Podkul, and Zeppos 2018a). Democratic primary voters and policy demanders also express preferences for 'electable' candidates with a broader appeal during the nomination process (Masket 2020), in part out of necessity, because the party needs to carry some swing or even marginally Republican-favored districts in general

elections to win a majority, as discussed in chapter five. The electoral landscape provides one potential explanation of Democratic preferences for strategic candidates in primaries.

Given that this analysis is conducted over a single electoral cycle, it is also necessary to consider the relative effect of 2020 electoral conditions on the two parties. Boatright and Moscardelli (2018) demonstrate that congressional primaries have a "presidential pulse." In 2020, the Democratic Party was favored to win the presidency and expected a strong down-ballot performance, with higher numbers of primary candidates as a result. Higher levels of primary competition may have served as a further incentive inducing Democratic candidates to adopt artificial positions.

The party-level differences may also relate to demographic and ideological differences between Twitter and non-Twitter users. Twitter users are Democratic-leaning and disproportionately come from demographic groups which favor the party, such as young college educated Whites with higher incomes (Wojcik and Hughes 2019). Even among Democratic partisans, those on Twitter tend to hold more progressive or left-leaning positions (Cohn and Quealy 2019), and higher numbers of comparative moderates are present in the Democratic electorate than on social media (Hawkins et al. 2018). Democratic primary candidates may therefore have communicated positions on Twitter to appeal to a section of the electorate that they—correctly—perceived as non-centrist. In contrast, Republican candidates may perceive that fewer of their primary voters are on Twitter and so used the platform to communicate to journalists and media outlets, other candidates, or party figures.

Asymmetries in the parties' financial structures may further explain these findings. Basedau and Köllner show that "centripetal tendencies are better avoided when the channels of party finance are controlled by the party leadership" (2005, 19), and recent literature highlights clear partisan differences in this regard. Boatright and Albert (2021) show that independent expenditures were not particularly prevalent in financing primary challengers to Democratic incumbents in 2018. Assuming a similar pattern in 2020, the tighter financial control of the formal institutions of the Democratic Party may have incentivized losing candidates to moderate to retain favor with party leadership and advance their political career. The asymmetric structure of media ecosystems, with greater pressure from the right and far-right of the ideological spectrum (Heft et al. 2021), may also have induced Republican candidates to maintain conservative positions. Pierson and Schickler find that meso-institutional structures—"including such features as state parties, the structure of media, and the configuration of interest groups" (2020, 37)—pull Republicans away from the center more

than Democrats. One interpretation of these findings is that these structures continue to affect Republican positions following primary defeats.

For general election voters, these results are not encouraging when considered in terms of spatial models of voting. Given that we see limited evidence of moderation among primary winners in either party,[231] voters in November appear to have been presented with polarized *choices*—as theorized by Fiorina, Abrams and Pope (2005)—albeit for contrasting partisan reasons, with Democratic candidates having strategically adopted artificial positioning during the nomination and Republicans sincerely holding non-centrist positions out of conviction. Non-moderation of Democratic primary winners may indicate a perception among candidates that they must continue to hew to the preferences of policy demanders beyond the primary, or that they must reflect candidates' beliefs about the electoral risks associated with moving positions between a primary and general election. For Republicans, these results indicate limited adaptation, and positions appear more deeply ingrained in the preferences of candidates.

These results align with scholarship indicating asymmetry in the ideological positions (Hacker and Pierson 2006; Theriault 2013) and identities (Grossmann and Hopkins 2016) of the two major parties and the policy demanders active during the nomination process within each. These differences provide distinct partisan constraints and incentives to candidates both during and after primary elections. Put simply, it appears that the between-election adaptative mechanism through which primaries may contribute to polarization do not affect the two parties in the same way, likely due to the asymmetries identified in chapter five. Alternatively, it may be that Democratic candidates are more responsive to policy demanders and primary voters in their communication. Given the findings in chapter seven that more liberal roll-call voting behavior helped Democratic incumbents minimize the threat posed by same-party opponents, adopting more liberal discourse during the primary may present a similar benefit for all candidates. In contrast, and as shown in chapter seven, Republican primary voters were not systematically more likely to vote against incumbents with more moderate voting records. These voters may be similarly agnostic regarding communication strategy.[232]

[231] This result aligns with theoretical expectations and empirical findings in Brady, Han, and Pope (2007)

[232] Though, as demonstrated in chapter seven, both Republican and Democratic voters do prefer candidates with non-centrist donor support.

In the previous chapter, I demonstrated that Republican incumbents are more responsive to ideological and factional challengers after a primary,[233] but the findings here indicate that Democratic candidates were more likely to adopt artificial positioning during the primary phase of, at least the 2020, electoral cycle. Losing Democratic candidates moderated after the primary, especially when they lost ideological and factional primaries. I argue that this is a causal effect of the nomination process, with candidates communicating artificial positions to try and align with key policy demanders and the perceived positions of their primary voters, and where the presence of a contested primary changed behavior. The non-moderation of primary winners means that Democratic voters were likely presented with a candidate espousing artificial positions further to the left than they would have otherwise taken due to the presence of contested (ideological and factional) primaries. The nomination process can, under the right circumstances, be said to have a within-election adaptative effect on candidates running for Congress, the final mechanism of primary polarization tested in this thesis.

[233] Given the data limitations, I am unable to test this effect during the Tea Party era observed in chapter six, the pressure and prominence of the reactionary Republican faction during that era would have served as a significant incentive for comparatively moderate or establishment candidates to adopt artificial positions during that period.

10 Conclusion: Primaries & Candidate Positioning

[The] lack of an obvious ideological gap between primary and general election voters helps explain why reforms aimed at broadening the primary electorate haven't produced meaningful results.

FiveThirtyEight political analyst Geoffrey Skelley[234]

On 24th May 2022, voters in Georgia went to the polls for the first primaries since the keenly contested runoff elections that had handed the Democratic Party control of the Senate just over a year earlier. Months before those elections, the state had played a key role in delivering the presidency for Joe Biden, focusing the nation's attention on the state's politics. In the state's 14th District, outspoken pro-insurrectionist Republican Representative Marjorie Taylor Greene comfortably won renomination with seventy percent of the vote, centering her primary campaign on 'the big lie' that Trump had won the 2020 presidential election. Yet, on the same date, incumbent secretary of state Brad Raffensberger—who publicly rebuked claims that Trump won and campaigned on the integrity of Georgia's elections—carried the district by twenty points in his statewide primary against his Trump-endorsed opponent, Representative Jody Hice.[235] Two candidates who framed their primary campaigns almost exclusively around their position on opposite sides of a single, highly salient issue, and who received support from distinct parts of the party network were both able to win primaries in the district by large margins.

Though candidates' intra-party support and stated reasons for running in primary elections fundamentally transformed in the twenty-first century, primary voters, it seems, have not adopted candidates' narratives and positional differences to inform their selection choices. Or at least, where they do, these differences form only one of a diverse set of decision-making criteria. The continued prioritization of non-ideological factors by voters—either out of preference or necessity—appears a major reason that theorized arguments about voter-side dynamics as a force for polarization in primary elections receive such limited empirical support in this thesis. Put simply, whether primaries contribute to polarization is not a story about voters.

[234] (Skelley 2021)
[235] Raffensberger received a call from Trump shortly after the 2020 election; the then-president requested he 'find' additional votes in Georgia (Shear and Saul 2021).

These findings should give particular pause to scholars and media commentators who argue that primary voters are an important source of partisan polarization given the potential for this narrative to influence candidates' behavior. Many candidates and incumbents adapted positions away from the center both within and between election cycles, meaning ideological and factional primaries contribute to partisan polarization through means other than voter preferences. Though there may be benefits for candidates in adopting non-centrist positions from donors, activists, and other policy demanders in the party network, this adaptative effect is also likely, at least in part, a response to popular perceptions about primary voters. The widespread derision of primary voters as extremists eager to nominate comparatively non-centrist alternatives does not appear an accurate depiction given the findings here, and such accounts of these voters appear crucial in driving candidate-side responses.

This thesis looked beyond the role of voters to consider distinct mechanisms through which primary elections may contribute to partisan polarization in Congress. As we have seen, how primaries nominate non-centrist candidates has little to do with decisions made by the voters on election day. In this concluding chapter, I discuss these findings in terms of their contribution to the study of primary elections, and their consequences for popular understanding of the institutions of legislative nomination for candidate positioning. Given the current prominence of primaries as a political issue, I pay particular attention to the implications of these findings for primary reform. In concluding, I discuss the limitations and potential extensions of this contribution, before looking to the future of intra-party conflict in congressional primary elections in 2022 and beyond.

10.1 Rethinking How Primaries Matter

The dynamics of congressional primary competition fundamentally changed in the early twenty-first century. Rather than being a result of short-term factors such as prevailing partisan electoral winds, this transformation was due to long-term structural shifts in U.S. politics and society. Contested congressional primaries are now far more common and more frequently take place for ideological and factional reasons than at any other point of the partisan era that emerged at the start of the 1980s. Previously noted trends of decline, both in terms of primary participation and electoral competition (Ansolabehere et al. 2006), have reversed. The new dynamics of congressional primary competition reflect the new landscape of partisan competition in Congress, where, as polarization and partisan entrenchment have more strongly shaped elite behavior, both parties have become more cohesive. Consequently, the institution of Congress has become more parliamentary in its operation (Mann and Ornstein

2012). In such an institution, with high partisan unity in roll-call votes, few parties, and a wide ideological distance between partisan elites, it may be particularly beneficial for parties to have a space to debate distinct policies and preferences within their broad ideological tents. Congressional primary elections have emerged as one such arena.

Factional primaries can, in the most likely cases, exert pressure on political elites to move toward an ideological pole. However, the proliferation of ideological and factional primaries has not led primary voters to systematically prefer non-centrist candidates, either compared to relative moderates in the same primary or when compared across districts. Nominees selected by primary voters—even in contests that are substantively about the relative positions of candidates—do not hold positions further away from the center than those selected without the input of primary voters and are no more 'extreme' than their closest rival for the nomination. This thesis therefore offers substantive evidence against the dominant narrative that primary voters are a source of partisan polarization in Congress. Even when presented with candidates who frame their candidacies in ideological terms and have connections to distinct factions in either party, primary electorates do not systematically express preferences for non-centrist candidates. The relative lack of response by voters appears to be driven by a continued lack of knowledge about the positions and policy preferences of same-party candidates. Primary voters remain ill-able to identify and position same-party candidates without party labels, even in nomination contests fundamentally about the relative positions of the candidates (see also Bawn et al. 2019). As a result, nominees who emerge from ideological and factional primaries are not positionally different to those emerging from other types of primaries, or those who face no primary competition.

Despite the lack of relationship between voter preferences and non-centrist position taking, candidates running for Congress frequently behave *as if* primary voters prefer non-centrist candidates (see also DeCrescenzo 2020). When challenged on ideological and, especially, on factional grounds, incumbent representatives adapt their roll-call voting behavior away from the center and hold these new positions for several subsequent congresses. Incumbents challenged in other types of primaries do not adapt their positioning in this way. Within a single year, 2020, Democratic candidates adopted artificial positioning during the primary phase of the election cycle. Candidates running for political office perceive benefits of non-centrist position-taking during the nomination, either due to the influence of policy demanders in these contests or because of their beliefs about the preferences of primary voters.

In this way, primaries may be contributing to polarization through the strategies that political elites perceive are effective for winning the nomination.

Having situated the research questions and clarified the data used in section one of this thesis, section two answered the first research question. Chapter four demonstrated that the candidate-side dynamics of congressional primary elections, especially in terms of ideological and factional contests, have fundamentally changed in the past fifteen years (RQ1). To reiterate; by 2020, primaries were far more frequently contested between candidates who received support from distinct parts of their party and framed their campaigns in ideological terms than they had been in 2006. The dynamics of competition in congressional primaries can therefore be understood to have transformed during this period. Intra-party support in, and candidates' framing of the reasons for, primary contests fundamentally changed in the twenty-first century. This change has coincided with a substantial increase in the numbers of contested primary elections. From the voters' perspective, reception of, and reaction to, these changes is much less clear. In answer to the 'why' of RQ1, chapter five proposed that structural changes are at the root of this transformation, with specific emphasis on electoral incentives, regulatory reforms, technological developments, and a nationalized political environment influencing the behavior of key actors in primary elections.

Section three of the thesis answered RQ2, where chapter six demonstrated that factional primaries *can* contribute to polarization by moving elites away from the political center in the most-likely case. The final empirical chapters then tested three distinct mechanisms through which primaries may contribute to polarization: the selective effect, the between-election adaptative effect, and the within-election adaptative effect. Chapter seven found scant evidence of a selective effect emanating from voters' decisions at the ballot box (RQ2.1), likely due to a lack of information about candidates' positions. The lack of voter information appears a particularly credible explanation given that the only modest selective effects were found in incumbent primaries, where voters likely know the most about at least one candidate. Despite the limited evidence of positional difference between parties' primary and general electorates, primary voters may more consistently prefer non-centrist candidates if they were better able to identify them.

Moving away from the selective effect of voter preferences, chapter eight demonstrated evidence of a between-election adaptative effect, where incumbent representatives moved away from the center following an ideological or factional challenge (RQ2.2). Finally, chapter nine demonstrated a within-election adaptative effect (RQ2.3), where Democratic candidates

adopted artificial positions—potentially to appeal to policy demanders and the perceived position of their primary electorate—during the primary phase of a single electoral cycle. The evidence of the adaptative effects indicates that primaries can influence candidate positions, but that positional adaptation appears rather disconnected from the choices of primary voters. The polarizing effect of primaries is not a bottom-up process emanating from voters but is instead driven by changing candidate behavior, likely a result of (mis)perceptions about voters and in response to the preferences of policy demanders in the party networks.

10.2 Academic Contribution

At a scholarly level, this work further contributes to the burgeoning literature on intra-party factions (Bloch Rubin 2017; Blum 2020; Clarke 2020). In doing so, I propose that contemporary U.S. parties are better understood as being ideologically consistent rather than homogenous. Though not as divided in terms of ideological distance as during the historically anomalous mid-twentieth century—when both parties contained liberal and conservative factions—modern parties continue to exhibit long-running cleavages, containing both regulars and realigners with distinct policy goals and approaches (Noel 2016; Reiter 2004). Though party elites, including candidates for Congress, have undoubtedly sorted, much of the homogenization of the parties in Congress appears to be a function of the changing dynamics and organizational structures of the institution (Aldrich 1995; Rohde 1991), where measures other than roll-call voting indicate continued intra-party strife in the modern era (Lee 2018). The congressional nomination process is one such arena where these divisions have increasingly played out.

Empirically, this thesis also goes some way to addressing the imbalance of attention on incumbent positions and primaries. This study enables the comparison of the relative positions of candidates across primary elections, including measures of candidates who lose the nomination. By taking advantage of digital sources, this thesis provides a more detailed picture of the landscape of primary competition, including candidates who were previously hard for political scientists to study or know what they were saying. The construction of the large-n qualitative dataset of recent primary competitions using digital sources is a major contribution of this work, where scholars using non-digital sources acknowledge the capture of additional information when using digital data (Boatright 2013).

Methodologically, this thesis offers an approach to coding candidates that travels to other countries where clear intra-party divisions exist. In a co-authored journal article (Cowburn and Kerr 2022), I apply this framework to center-left parties in England, Germany,

and the United States, considering how variation in the inclusivity and decentralization of selectorates relates to the ability of progressives in each party to earn the nomination for national legislative office. This framework could be applied to other research areas that would benefit from identifying elite variation at the intra-party level. Given the increasing party unity in Congress, this approach may also prove increasingly necessary in the U.S. context, particularly when used alongside automated text-as-data approaches such as in chapter nine. I see these measures as complimentary to other scaling measures, including those that I have worked on in other projects during the writing of this thesis, including those based on media engagement (Cowburn and Knüpfer 2022) or behavioral diversity in communication (Cowburn and Oswald 2020). Combining qualitatively constructed datasets with quantitative methods enables researchers to infer causality about statistical relationships while ensuring case-level knowledge—often vital in context-driven contests such as primary elections (Kamarck and Wallner 2018)—is not sidelined.

At the party level, this research can be understood as extending the concept of coalitions of policy demanders—to date, largely applied to presidential nomination (e.g., M. Cohen et al. 2008)—into the legislative space. In doing so, I bridge scholarship on the processes and practices of congressional nominations (Boatright 2013, 2014; Hassell 2018) with that concerned with institutional polarization (Fiorina, Abrams, and Pope 2005; McCarty, Poole, and Rosenthal 2006; Theriault 2008). Undertaking this work necessarily leverages recent scholarship that challenges the notion that parties have become homogenous in the partisan era (Bloch Rubin 2017; Blum 2020; Clarke 2020), and instead conceives that intra-party ideological and factional diversity remain central and identifiable, especially in areas other than congressional roll-call voting.

This research may also have applications beyond the United States. Though the narrative of primaries as polarizing is most prominent in the U.S., open systems of candidate selection are similarly criticized elsewhere, where May's law (May 1973) indicates that candidates selected by partisan supporters will be ideologically distant from the population at-large. Yet, research on legislative primaries in Mexico finds that candidates elected via primaries are more moderate and likely to be party insiders than those chosen by the leadership (Bruhn 2013). Work on primaries across Latin America also demonstrates a positive association between primary competition and candidate strength (Carey and Polga-Hecimovich 2006), with potentially similar explanations to those developed here. In the UK,

the Corbyn-allied Momentum has called for primaries to recruit more diverse legislators[236]—citing the example of Alexandria Ocasio-Cortez as justification (Bell 2020; L. Fisher 2018)—and the inclusion of parties' members in leadership selection decisions has been attributed as causing systemic dysfunction (M. Fisher 2022). Given the global prominence of U.S. primaries both in the academic literature on candidate selection and in other parties' arguments about internal democracy, the framework and ideas developed in this thesis may also help scholars better understand legislative nomination trends and intra-party competition in other countries.

10.3 Implications for Representation

From a normative perspective, political science is in broad agreement that electoral competition is good, with positive downstream effects for the quality of deliberative democracy, improved representation, and greater accountability of representatives to their constituents (Disch 2012; Mansbridge 2003). Elections that are about substantive issues and policy differences are also better for democratic accountability than those concerned with personal appeals connected to candidates' personality or style (Arbour 2014). Yet, these arguments have been notably absent in discussions of the recent transformation of congressional primaries. Democratic theorists have rarely championed the improved accountability when elites face two distinct sets of voters,[237] and the move from personality-driven to issue-based primary contests has more commonly been met with derision than viewed as a cause for celebration.

Without doubt, increased levels of intra-party competition have brought new challenges to the functioning of representative democracy, but, as many of the results presented in this thesis indicate, fears about the polarizing effects of primary voters lie somewhere between vastly overstated and wholly unfounded. In a polity with a wide and broadening spectrum of ideological positions and political discourse but only two viable major parties, effective accountability mechanisms that include intra-party democratic checks appear increasingly important. When parties were ideologically broad but regionally fractured, congressional nominations may have been less important in fulfilling this role. In a nationalized environment, where distinct factions of each party exist within a congressional district, and levels of partisan competition are low, congressional nominations play an increasingly vital role in terms of accountability. As scholars on the subject have noted, primaries "have become more interesting

[236] Momentum make this argument in terms of demographics and identity, though critics suggest that the group's desire for legislative primaries is designed to produce candidates further to the left.
[237] Given the partisan lean of most districts (see Figure 5.1), primary elections are now the main mechanism through which citizens can hold representatives to account across vast swathes of the country.

than they were for much of the twentieth century" (Boatright, Moscardelli, and Vickery 2017). At the same time, they have come to serve a more central function for representation.

Increased competition in primary elections raises further normative questions about democracy. The recent uptick in preference for 'outsider' candidates with no prior political experience could be considered a natural reaction by informed voters to the low-levels of legislative productivity (Mayhew 2005) and policy outcomes that are increasingly detached from the preferences of the majority of Americans (Gilens 2012). For the informed voter, the nomination of amateur candidates positioned further from their party in Congress might be viewed as beneficial by shaking up a dysfunctional system, where ideological and factional primaries fulfill a demand for change emanating from the electorate at large. In other words, it may not seem so irrational that a large section of voters think that Congress could benefit from some outside voices and new ideas. Unfortunately, though this narrative may sound appealing to disaffected voters, empirical evidence indicates that amateur and outsider candidates who advance to Congress are more likely to perpetuate than alleviate the problems they claim to resolve, with lower rates of legislative productivity and effectiveness (Volden and Wiseman 2014). Debates about the relative merits of experience and new perspectives remain notably absent from discourse between political actors and in media coverage of elections and the institution of Congress.

10.4 Empirical Applications

During the writing of this thesis, media outlets with a greater focus on quantitative data have begun to challenge the narrative that primary voters are a source of polarization (see e.g., Skelley 2021). Unfortunately, in much of the popular coverage, partisan primaries remain viewed as a problem to be solved or even a threat to the practice of democracy (see Foley 2022 for a particularly egregious example). Given the minimal selective and much larger adaptative effects found in this study, this media narrative may itself being influencing the behavior of (potential) candidates for Congress, thereby contributing to the problem it seeks to decry. The continued dominance of this common story therefore appears particularly troubling. In a small way, I hope that this work can add to the growing body of empirical evidence about the limited role primary voters play in the debate about congressional polarization.

The findings in this thesis also indicate that elites such as congressional candidates are better understood as consistently partisan rather than ideologically homogeneous, where partisan entrenchment has increased even as intra-party ideological and factional rifts have maintained or even deepened. Indeed, in some cases inter-party hostility and intra-party

division are directly connected, such as when Representative Madison Cawthorne took to Instagram following his 2022 Republican primary defeat by an opponent with establishment support,[238] saying, "we have an enemy to defeat, but we will never be able to defeat them until we defeat the cowardly and weak members of our own party" (Cawthorne 2022). Moderate Republicans also recognized the primacy of intra-party battles, with outgoing Maryland Governor Larry Hogan calling his prospective replacement a "QAnon whack job" and saying "there's going to be a long battle for the heart and soul of the Republican Party, and this is just the beginning" (quoted in Pengelly 2022). Though Democratic candidates rarely took such hostile tones against members of their own party, criticism of progressives and moderates alike continued in the first primaries of the Biden presidency.

Conceiving of parties as contested organizations has substantive consequences for how we understand political conflict in the current partisan era. Party identifiers in the electorate consistently overestimate their ideological distance from the alternative party (Mercier, Celniker, and Shariff 2022; Yudkin, Hawkins, and Dixon 2019). Increased attention on intra-party cleavages and positional diversity may therefore serve to alleviate some affective hostility fostered by this perception gap among the American public, where elite intra-party differences "may offer a vehicle to bridge the seemingly intractable divide" (Bloch Rubin 2017, 304). As intra-party conflict among elites in Congress has become more prominent, intra-party polarization among voters—defined as the ideological distance between moderate and comparatively extreme partisan identifiers in the electorate—has also increased (Groenendyk, Sances, and Zhirkov 2020).

More broadly, this thesis contends that intra-party divisions matter. In the wake of the January 6th insurrection, some commentators argued that polarization is the wrong framing to understand elite partisan behavior in Congress, and that we are instead witnessing a trend of Republican radicalization (J. Rubin 2021). Viewing the rightward movement of the Republican Party and accompanied abandonment of the democratic rules of the game as the central crisis facing U.S. party politics places no lesser emphasis on intra-party politics. Given the strong incentives for two-party electoral competition in the U.S. electoral system (Duverger 1964) and the party's institutional advantages in both chambers of Congress and the Electoral College, the Republican Party appears unlikely to wither away or disappear. Therefore, the only viable mechanism through which the party will return to adhering to democratic rules

[238] Cawthorne's defeat can be attributed to a combination of his attempt to change districts, multiple personal scandals, and the outright hostility he invoked from fellow Republicans in Washington.

and norms is via party elites who are willing to prioritize these values. In this way, intra-party politics has perhaps never been so central to U.S. democracy.

10.4.1 Implications for Primary Reform

Though some scholarship makes an active case for reforms designed to create a multiparty democracy (Drutman 2020),[239] systemic barriers mean these changes are unlikely in the short to medium term.[240] The two-party system will likely remain intact for the foreseeable future, with intra-party differences likely becoming more prominent as the positions of elites continue to diverge. In an environment with few parties and a broad ideological spectrum, it therefore appears normatively necessary that citizens have an opportunity to provide input into the identity of candidates chosen, with ideas and policies also debated at the intra-party level. Reform efforts may therefore be better directed away from abolishing partisan primaries—or yet more proposals aimed at increasing turnout within them—given that these findings suggest that such reforms are unlikely to produce more moderate nominees. Providing more information about the identity and positioning of same-party candidates—whom primary voters remain ill-able to position—may serve as a more productive alternative avenue to foster closer alignment between the preferences of primary voters and elites. To reiterate, if nominees in both parties were more congruent with their primary electorates, they would be less polarized than they are currently (Bafumi and Herron 2010). This fact has far too often been overlooked in reform attempts.

Despite the growing public recognition that primary voters are not a source of polarization (Drutman 2021; Skelley 2021), efforts to reform primary elections in ways which produce more moderate outcomes have not subsided. From 2022, Alaska will operate a top-four ranked-choice primary, and legislation to move to a top-two system has also been introduced in Arkansas, Illinois, Massachusetts, Mississippi, Nevada, New Mexico, New York, North Carolina, Oregon, Virginia, and West Virginia (Top-Two Primary 2022). These reforms have advanced despite the lack of success in delivering less polarized outcomes in California, and, perhaps more troublingly, raising normative questions about the democratic legitimacy of the electoral process given that voters were largely unaware of the changes (Ahler, Citrin, and Lenz 2016). The non-alignment of turnout and nominee position found in chapter seven—alongside other work finding little to no relationship between primary rules and nominee

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[239] These suggested reforms are also not without challenges (see Drutman, DiSalvo, and Teles 2022).
[240] The presence of primaries likely limits the appeal of third parties in a system where it is easier for candidates with weak ties to one of the major parties to run within rather than outside of the party structures (see also Duverger 1964).

position (McGhee et al. 2014)—strongly suggests that emancipatory reforms are unlikely to deliver more moderate general election candidates.

10.5 Limitations & Extensions

The limitations of this work are largely connected to the data and sources used. Given the need for alternative data about primary contests that do not happen and candidates that do not run for Congress, this thesis has been explicitly interested in the influence of primary elections *once* candidates emerge. As stated previously, the party coalitions, elite actors, and the process of congressional nomination shape the electoral landscape and are key determinants of who runs for Congress (Hall 2019; Hassell 2018; Thomsen 2017b). The preventative effect discussed in the introduction is therefore explicitly *not* tested in this thesis and appears a further mechanism through which the institution of candidate nomination may contribute to polarization. As with the adaptative effect, the preventative effect is more intricately connected to (potential) candidate perceptions about the primary electorate and the positions of policy demanders in the party network than the choices of primary voters. Though comparatively well studied, electoral competition in general elections also plays an important role in determining the identity of members of Congress, where the benefits of ideological moderation appear to have decreased in recent years (Utych 2020b). Future scholarship could therefore incorporate the entire campaign lifecycle from the invisible primary through to the general election outcome to better understand the effect of the U.S. electoral system on the makeup of Congress.

A further potential limitation of this work is the reliance on digital sources. Given that this thesis was largely conducted thousands of miles away from the U.S. during a global pandemic, opportunities to meet candidates or see campaigns up close were, unfortunately, limited. As a result, digital sources were relied upon in all cases. This reliance on digital sources leaves open the possibility that when candidates meet primary voters in person away from the media spotlight, they continue to discuss local issues and prioritize valence factors, and it is only in their online and media engagement that have transformed. It may therefore be that some of the changes observed here are even more deeply connected to the technological developments discussed in chapter five. Further in-depth qualitative work in the vein of the seminal studies from the 1970s (Fenno 1978; Mayhew 1974)—regrettably, all too rare in modern political science—would shed light on these potential discrepancies. Given my use of digital sources, I am also restricted in my timeline, meaning I am entirely reliant on (and

incredibly grateful for!) the work of researchers before me to make any historical or longer-term comparisons about congressional primary elections.

This study is also limited in its ability to understand how primary voters *respond* to candidate messaging. Further research, including data from surveys and experiments, would be of great assistance in understanding voter attitudes in environments where party cues are absent. An additional potential mechanism whereby primaries serve as a source of polarization is that candidate perceptions about the preferences of primary voters are correct, but, in equilibrium, candidates neutralize this effect through the adaptation noted in chapters eight and nine. Neutralization of ideological difference may also occur via other actors in the party network. Understanding this potential effect would require further experimental work to test primary voters' candidate preferences.

Unlike primary voters, actors within the party networks do hold distinct and consistent positions. If these groups are particularly influential during the nomination process—as indicated here and in other studies (Masket 2009)—future work would benefit from less emphasis on the position of primary electorates and more explicit focus on the role of donors, activists, co-partisan elites, and ideologically-aligned media outlets during primaries. Further research could analyze the influence of candidate positioning on support from policy demanders. Some research indicates a positive association between policy positions and 'outsider' group support in primaries (Manento 2019), but future scholarship could focus on the causal relationships between candidate positioning and support, either in terms of funding or endorsements. This thesis indicates that a combination of influence from policy demanders and candidates' perceptions about the preferences of primary voters have done much to determine the behavior of candidates in primary elections. Survey work fielded to primary candidates would therefore provide further clarification about whom these political elites *think* they are appealing to during the nomination (see also Anderson, Butler, and Harbridge-Yong 2020).

Broadening this study to include state and local races would provide deeper understanding about the nationalization of intra-party politics. Adding gubernatorial primaries would be one logical extension of this work given that general elections for this office are notably less nationalized than congressional elections (Sievert and McKee 2019). Analyzing these contests would advance our knowledge about the relative trends of primary and general election nationalization. Intra-party divisions in states' secretary of state or attorney general

races may be of particular interest given the recent challenges to the legitimacy of elections.[241] Increased focus on electoral administration likely means that primaries for state and local offices, especially in battleground states, will see many of the same developments noted here at the congressional level. Alternatively, the trends observed here may be more prominent in congressional primaries given that policy demanders and activist groups are nationally focused and disproportionally concerned about who controls Congress. Alignments or differences in local and national trends would therefore enable better understanding of the causal mechanisms and key actors driving these changes. The continued advocacy for, and implementation of, participatory reforms may also necessitate further research into the relationship between primary turnout and nominee positions, though this non-relationship appears settled in the literature.

The increased prominence of questions about (non-)adherence to democratic norms mean that future work on intra-party divisions could center on this subject rather than the broader topic of ideology. Current intra-party cleavages mean such an analysis would likely better apply to the modern Republican Party, though analyses of policy issues that divide the Democratic Party could also provide informative data about the trajectory of, and fissures within, the party coalition. Roll-call unity scores seem unlikely to decrease again in the medium term given the current levels of partisan affect, negative partisanship, and institutional structures of Congress, meaning the incorporation of other metrics will be necessary to identify these divisions. Such work could focus on campaign positions using natural language processing (NLP) methods such as sentiment analysis. Other approaches could include network analyses of media engagement or bill co-sponsorship to alleviate the issues associated with using roll-call voting as a proxy for ideology in the modern era.

Given the focus here on temporal trends across a fifteen-year period, some simplification of the internal dynamics of both parties has been necessary. Further work could therefore examine more granular patterns, for example within a single party over a shorter period (see also Cowburn and Knüpfer 2022). Of particular interest may be the question of how factions and groups come together following an ideological and factional primary to cooperate in a general election campaign. Are some groups better at working together than others, and what strategies do sore losers pursue when they fail to win the nomination? The findings in this thesis indicate that the Democratic Party is comparatively better able to, and more actively

[241] Discouragingly, studies find that exposure to Republican intra-party conflict on this issue has little impact on partisan political attitudes (Clayton 2021).

involved in, coordinating disparate elements within the party coalition, though closer analysis of the progressive movement would provide further insight in this area.

10.6 Outlook: Intra-Party Conflict in 2022 & Beyond

Intra-party battles in both parties' legislative nomination contests show no signs of abating or becoming less salient in the near future, with primary turnout further increasing in the early primaries of 2022 (Gardner and Brown 2022). Among Democrats, rifts between progressive and establishment candidates continued in 2022, such as in Texas's 28th District between incumbent Henry Cuellar and progressive challenger Jessica Cisneros, and Oregon's 5th District, where moderate incumbent Kurt Schrader was defeated by Elizabeth Warren-endorsed Jamie McLeod-Skinner. In many intra-party fights in 2022, the Democratic Party appeared increasingly willing to mobilize against the progressive faction, directly intervening against progressives in primary elections even in safe districts (Krieg and McKend 2022). At the state level, the party used control of the redistricting process to bolster establishment figures at the expense of progressives. In the example given in the introduction of this thesis, Marie Newman was forced into an unfavored district against a more experienced incumbent in 2022 by a redistricting process controlled entirely by the Illinois Democratic Party.[242] The trends of Democratic Party competition that emerged at the start of the Trump presidency have not abated and are a continuation of the longstanding ideological and operational cleavage in the party. In these fights, the party continues to be more willing to expend energy supporting establishment candidates than its Republican counterpart.

Among Republicans, intra-party divisions moved further to the right in the wake of the (falsely) disputed 2020 presidential election. Decertification of these results was viewed as a "litmus test" by candidates in Republican primaries (candidate Adam Steen, quoted in Weigel 2022). As a result, many media outlets reported a deepening intra-party divide, with national coverage reporting that "there are two Republican parties...when it comes to choosing sides in primaries, a split is widening" (Hounshell 2022). Despite increased attention on Republican internal divisions, few non-incumbent candidates countered Trump's narrative of a 'stolen' election, where prominent figures such as Representative Elizabeth Cheney and a handful of incumbent governors[243] were the most active intra-party opposition to Trump's big lie. Less well-known candidates in Republican primaries were either keen to voice their support for, or

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[242] Newman lost her 2022 primary to fellow Democratic incumbent Sean Casten in a district that more closely resembled his former constituency.
[243] Including Brian Kemp in Georgia, Larry Hogan in Maryland, Charlie Baker in Massachusetts, Mike DeWine in Ohio, and Pete Ricketts in Nebraska.

at least muted in their critique of, this narrative, with roughly half of Republican nominees for Congress in 2022 expressing doubts about the legitimacy of the previous election results (Rakich and Rogers 2022). Intra-party divisions also continued to work their way down to local contests, with Republican primaries for school board elections focused on the teaching of critical race theory, and national policy differences becoming more salient in local Democratic contests.

In chapter two, I noted that internal Democratic Party divisions had been comparatively stable since the emergence of the New Left in the late 1960s. In contrast, the Republican Party has exhibited a form of 'rolling' factionalism, where new realigner factions emerge and, over time, became the party regulars before eventually being challenged by a newly emergent realigner faction. The post-2020 anti-democratic turn opens the possibility of a further 'roll' towards the right. If we are to conceive of the modern Republican Party as being built around such a rolling factional structure, the direction of travel appears increasingly disconnected from traditional notions of 'conservatism'. Much of the post-2020 division in the Republican Party appears scantly connected to policy positions or legislative outcomes, with pro-insurrectionist candidates structuring their campaigns almost entirely around loyalty to 'the big lie' that Trump won the election. At the same time, Republican primary candidates have increasingly called for violence, even against own-party opponents, with one Senate campaign issuing "RINO Hunting Permits" (Greitens 2022).

Both partisan and intra-party divisions over the adherence to democratic norms have become increasingly salient. As legal scholars have noted, "Republican office-holders have been more likely than their Democratic counterparts to push the constitutional envelope, straining unwritten norms of governance or disrupting established constitutional understandings" (Fishkin and Pozen 2022). In the wake of revelations from the January 6th committee and the *Dobbs v. Jackson Women's Health Organization*, No. 19-1392, 597 U.S. (2022) Supreme Court decision, party scholars have highlighted a partisan asymmetry in institutional commitments, where "Democrats value democratic norms over policy achievements, and Republicans feel the opposite" (Masket 2022). Institutionally, this asymmetry appears at least partly connected to the outcomes of intra-party conflict in both parties. Establishment figures in the Democratic Party have, thus far, resisted progressives' calls for institutional changes such as removing the filibuster or adding seats to the Supreme Court. In contrast, the increasing intra-party power of the reactionary Republican faction has produced a congressional party with few qualms about adhering to established precedents and procedures. Put simply, intra-party politics have

contributed to the multiple institutional crises currently facing the American polity. These contributions have, to date, been comparatively understudied and poorly understood.

Structural changes in U.S. politics and society have reshaped primary candidates' support networks and reoriented their campaign framing, meaning that intra-party conflict will continue to play out in congressional primary elections. These ideological and factional primaries will continue to influence candidate positions for the foreseeable future. The mechanisms by which they do so are largely independent of the choices made by voters and are instead the result of candidate behavior and positional adaptation.

11 Appendices

These appendices for chapter four through nine report results with the inclusion of the main thresholds used in the primary literature, provide robustness checks for important results, and show the main results including additional controls. In some cases, I repeat analyses using a multi-level model to control for variation based on states' primary rules. The datasets used for this thesis as well as replication materials are available from the author upon request. At the end of this thesis, I present the codebook with a description of the variables used.

11.1 Chapter Four

Figure 11.1 Number of Primaries with Electoral Thresholds

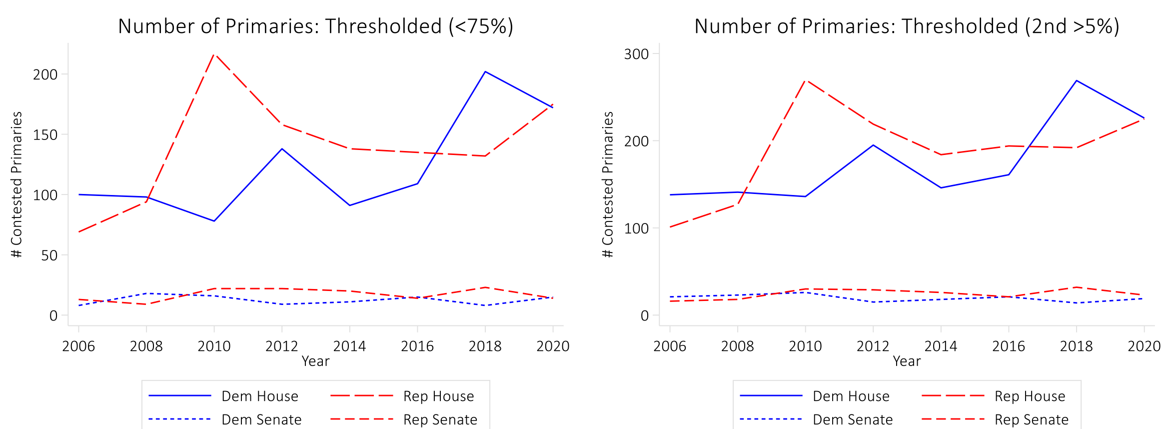


Figure 11.2 Number of Primaries with Financial Thresholds

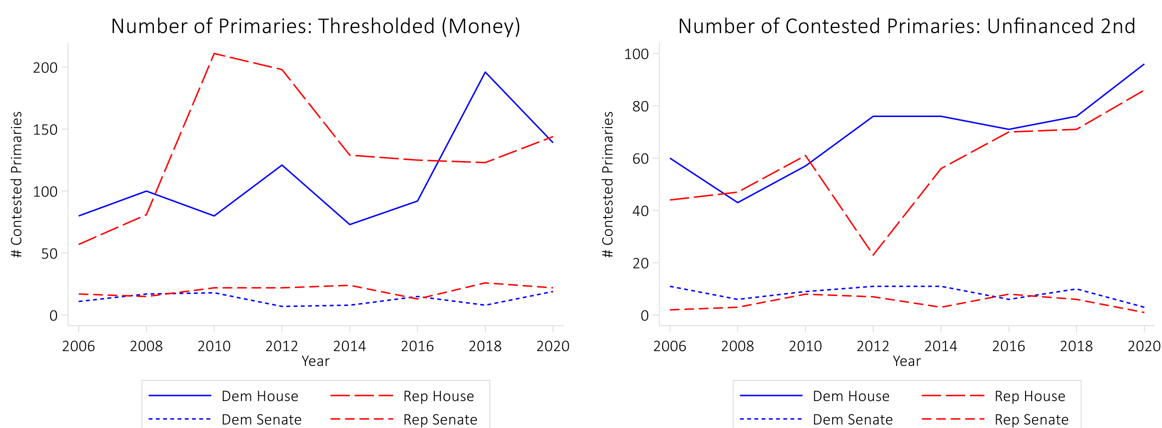


Figure 11.1 and Figure 11.2 show the frequency trends with electoral and financial thresholds. Figure 11.2 only includes contests where at least two candidates raised money (right), and a comparison of the number of contested but unfinanced[244] primaries (left). Only including primaries with two financed candidates indicates somewhat similar patterns in both

[244] Or, at least, with no more than one candidate who raised $5,000 and so were required to file with the FEC.

parties, albeit with slightly lower totals of contests in each year. For the numbers of unfinanced primaries, we see steadily growing numbers of longshot challengers who raise no money and have little hope of advancing to Congress, though these increases—roughly forty additional contests per party per year by 2020—only partially account for the greater numbers of contests in Figure 4.1. The outlier in Figure 11.2 is the 2012 Republican Party primaries, which saw very few unfinanced contests due to the maturity of the Tea Party's financial apparatus at this time.

Figure 11.3 Number of Factional Primaries (Thresholded 75%)

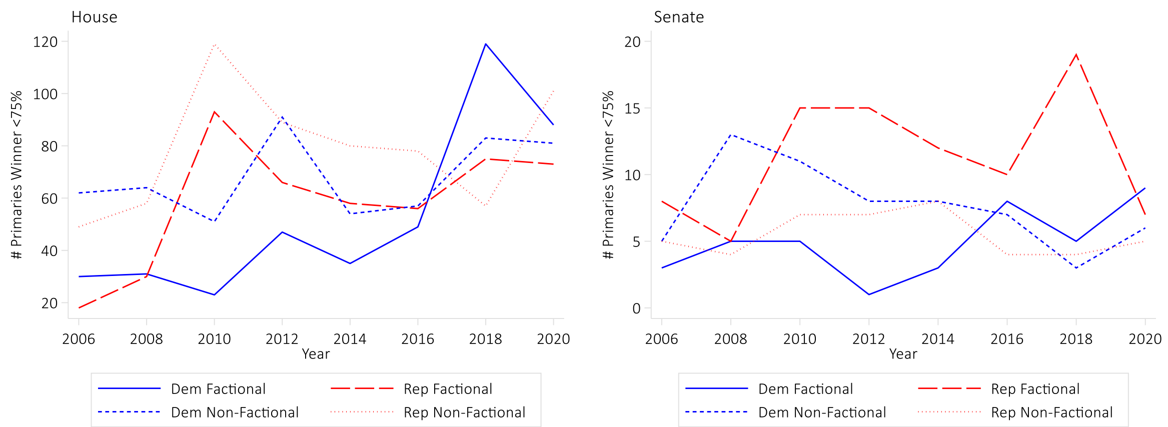


Figure 11.4 Number of Factional Primaries (Thresholded 5%)

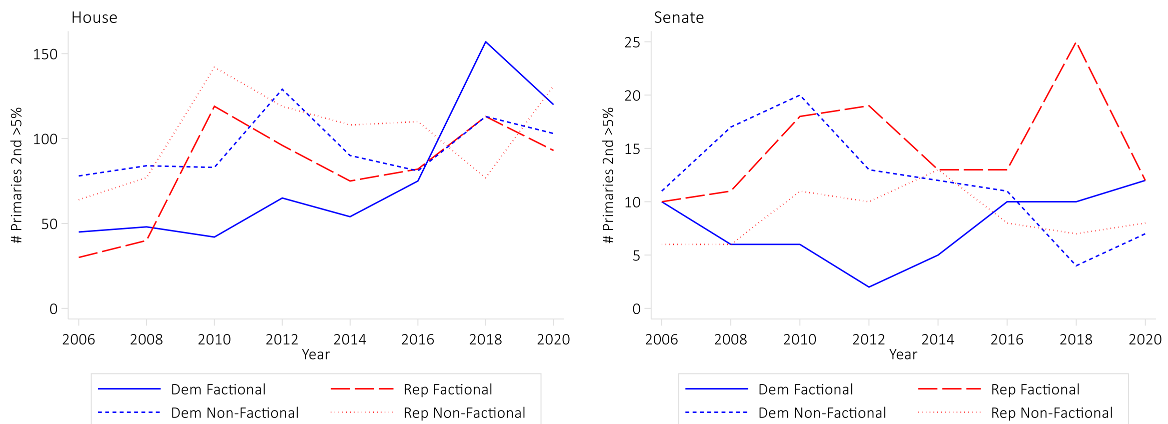


Figure 11.5 Number of Factional Primaries (Financed)

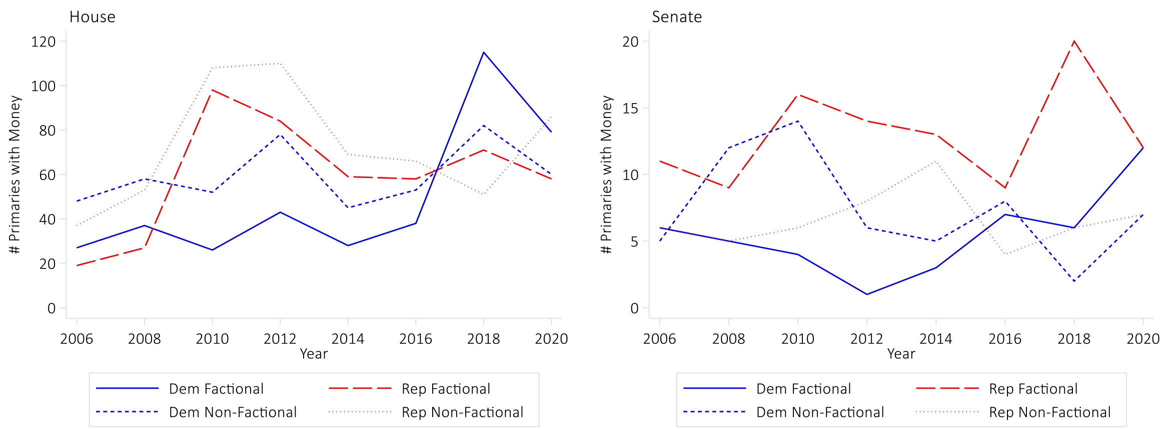


Figure 11.6 Number of Factional Primaries by Type

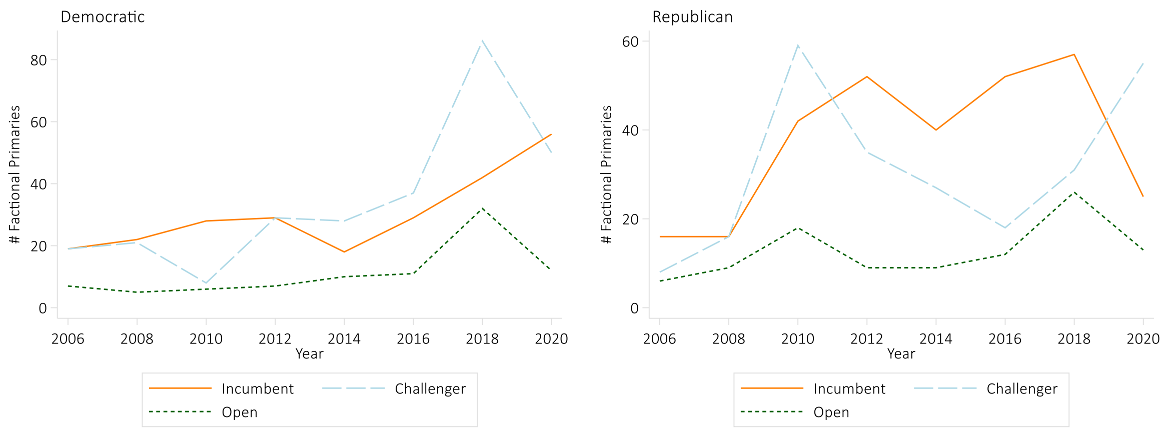


Figure 11.7 Primary Winner Faction

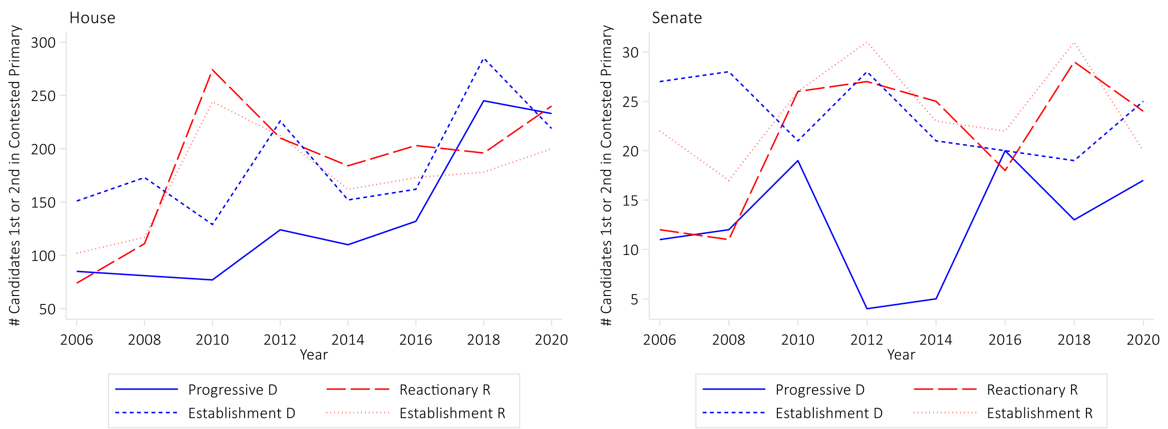


Figure 11.8 Primary Second Faction

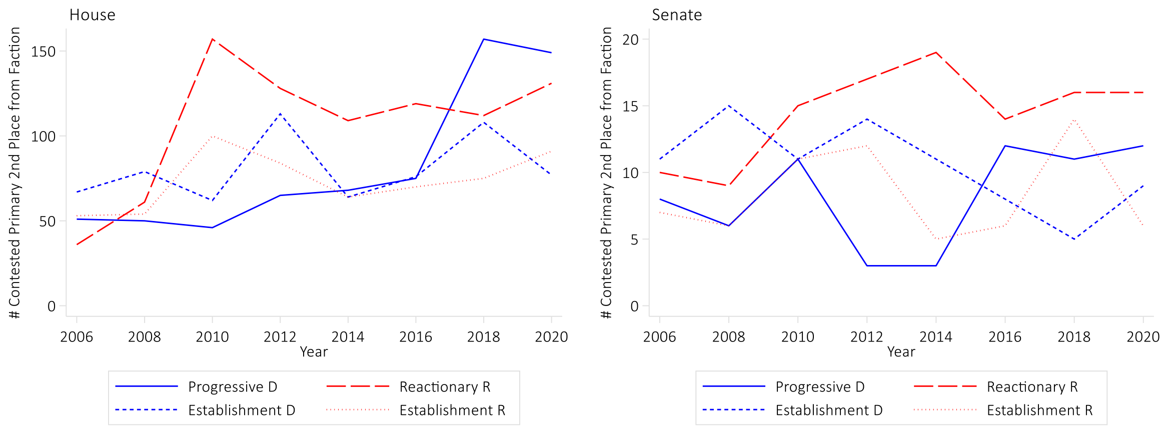


Figure 11.9 House Primaries by Reason for Contest (75% Threshold)

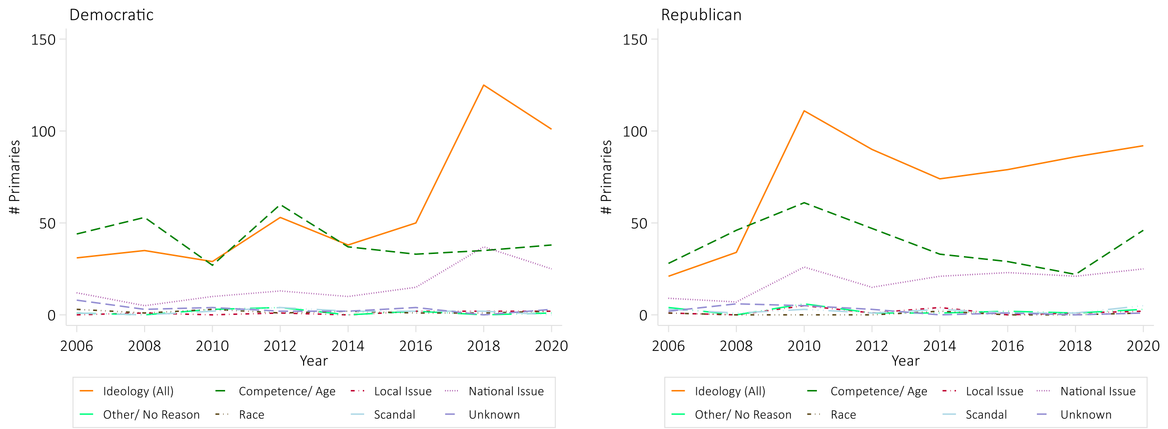


Figure 11.10 Senate Primaries by Reason for Contest (75% Threshold)

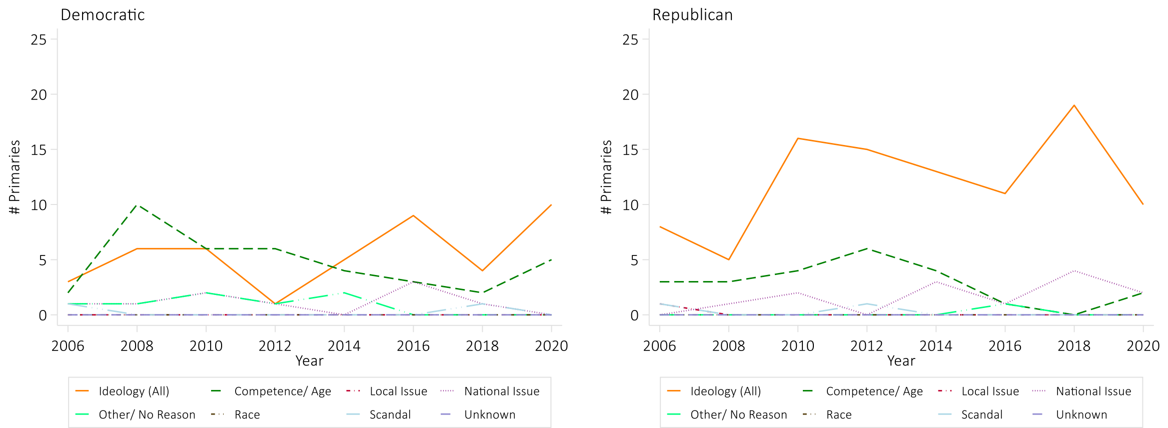


Figure 11.11 House Primaries by Reason for Contest (5% Threshold)

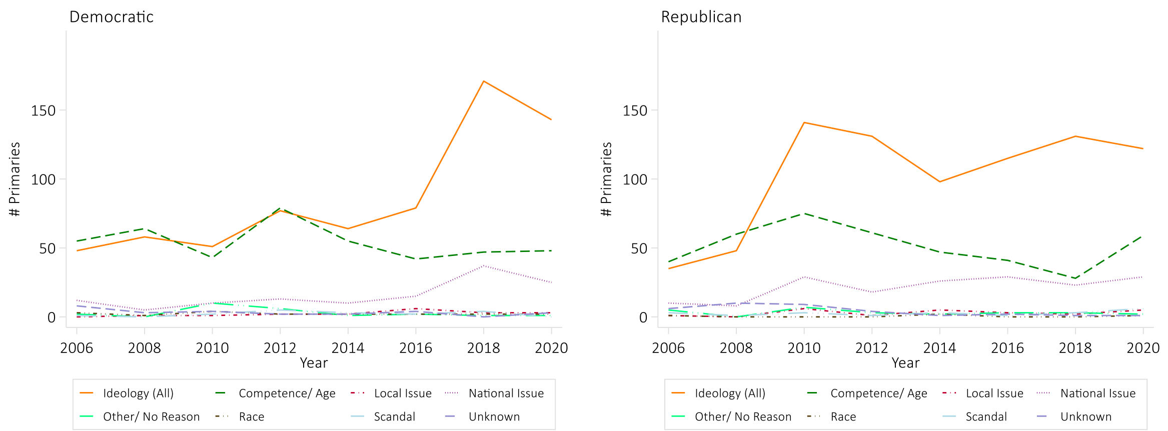


Figure 11.12 Senate Primaries by Reason for Contest (5% Threshold)

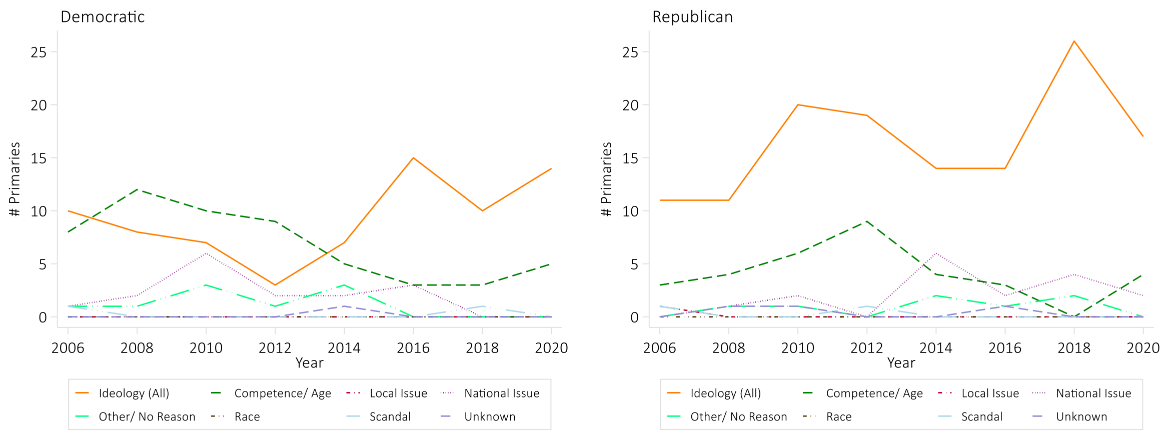


Figure 11.13 House Primaries by Reason for Contest (Finance Threshold)

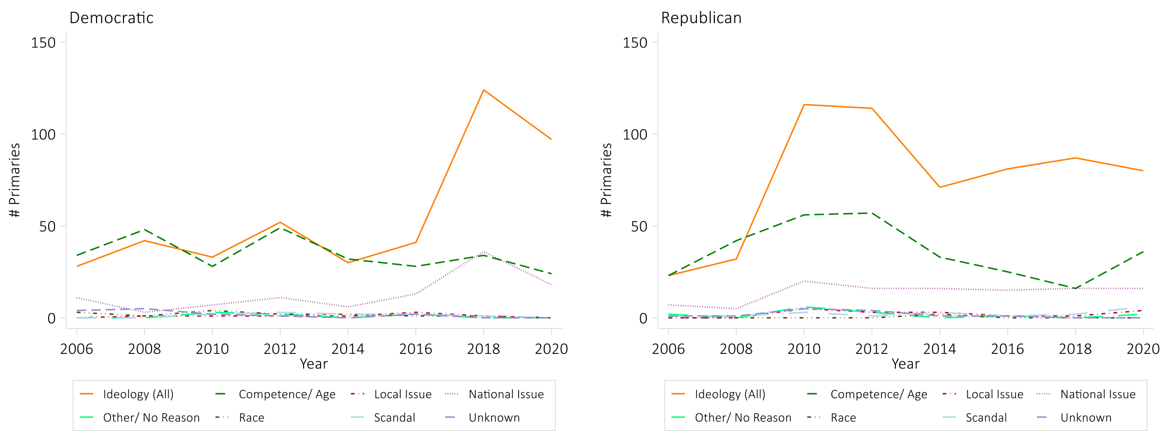


Figure 11.14 Senate Primaries by Reason for Contest (Finance Threshold)

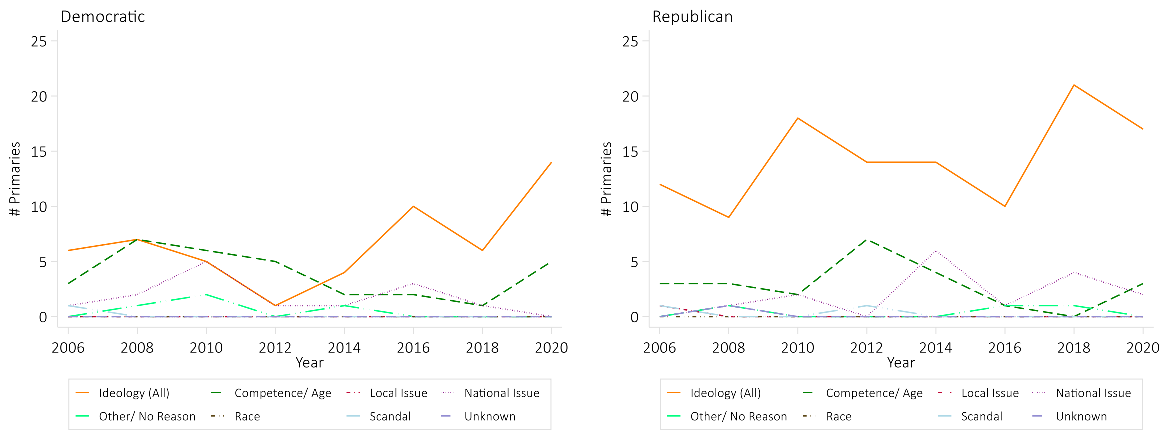


Figure 11.15 Challenger House Primaries by Reason for Contest

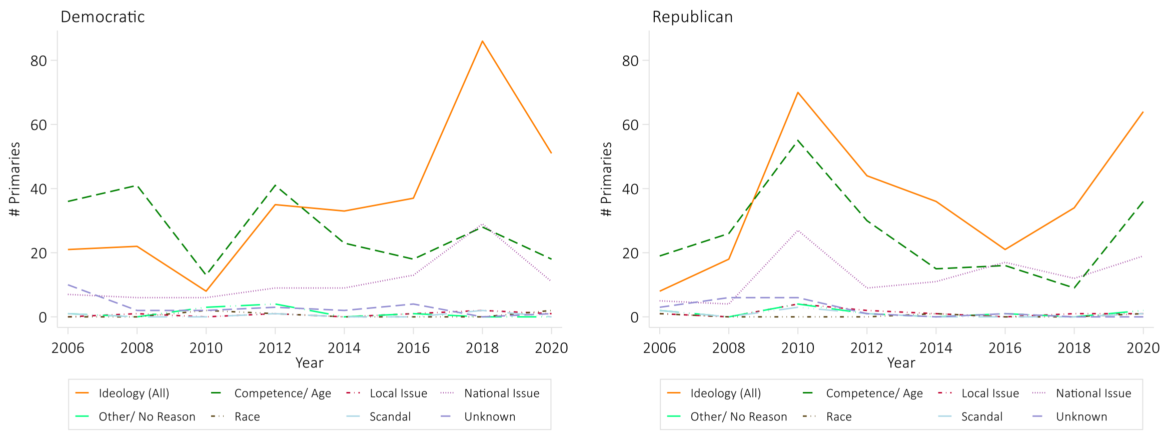


Figure 11.16 Incumbent House Primaries by Reason for Contest

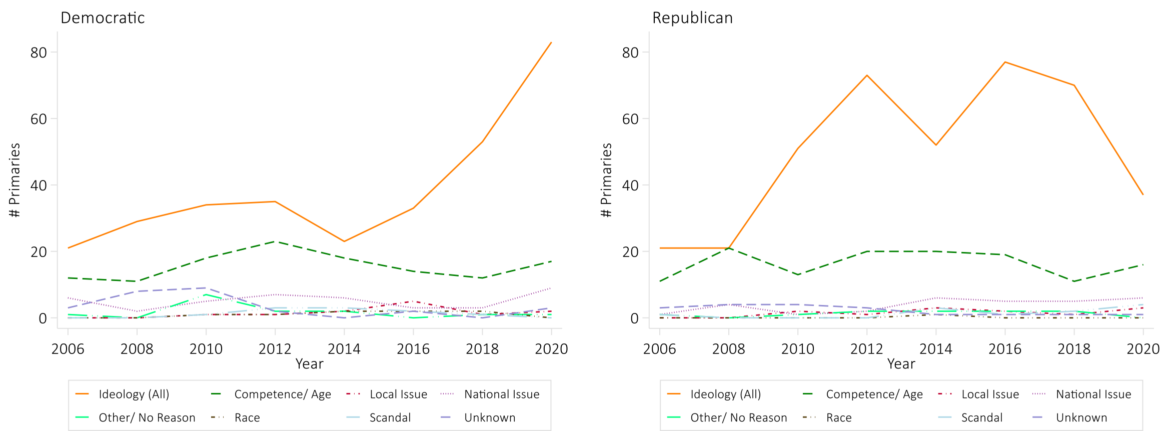


Figure 11.17 Open House Primaries by Reason for Contest

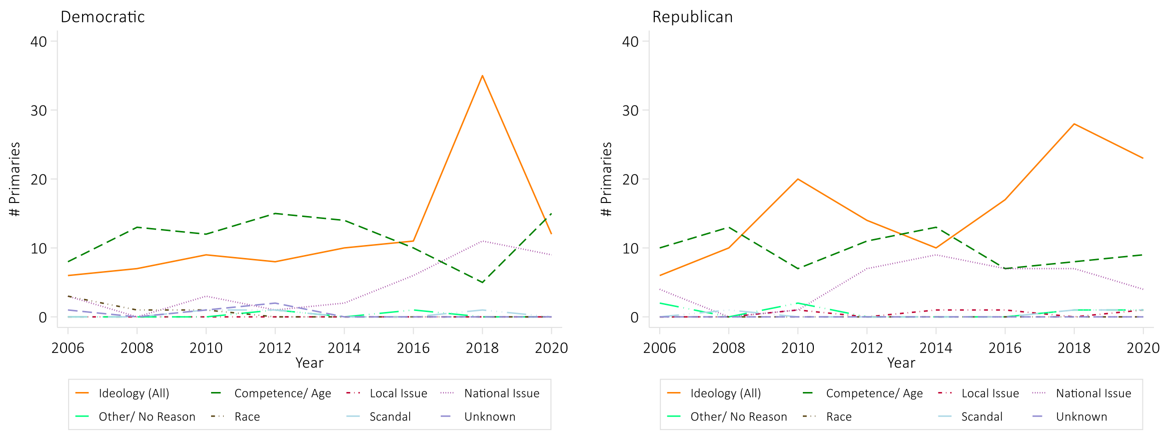


Figure 11.18 Ideological Challenges to Incumbents (75% Threshold)

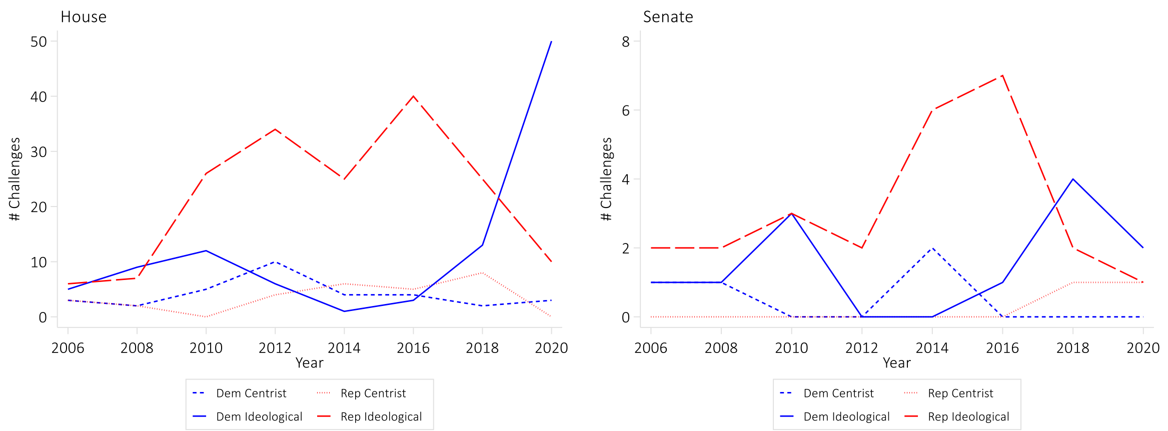


Figure 11.19 Ideological Challenges to Incumbents (5% Threshold)

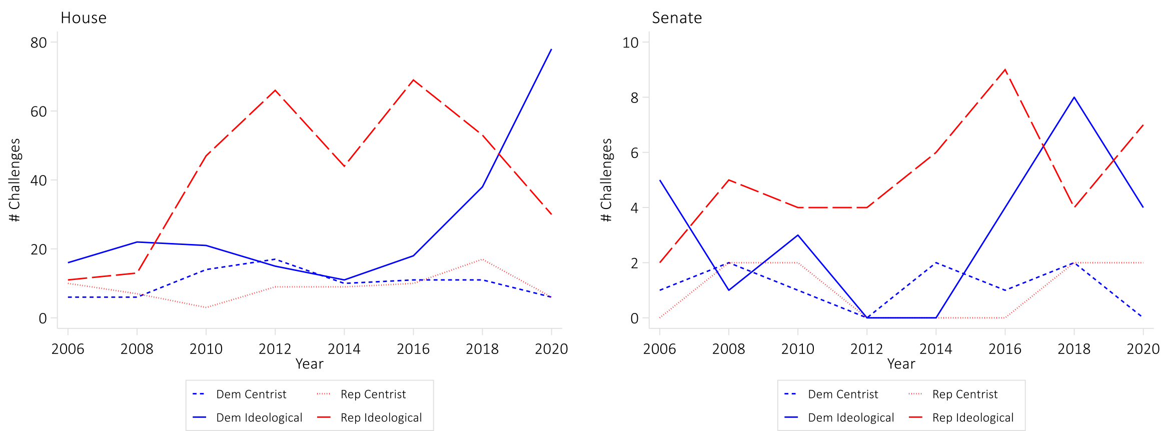


Figure 11.20 Ideological Challenges to Incumbents (Financial Threshold)

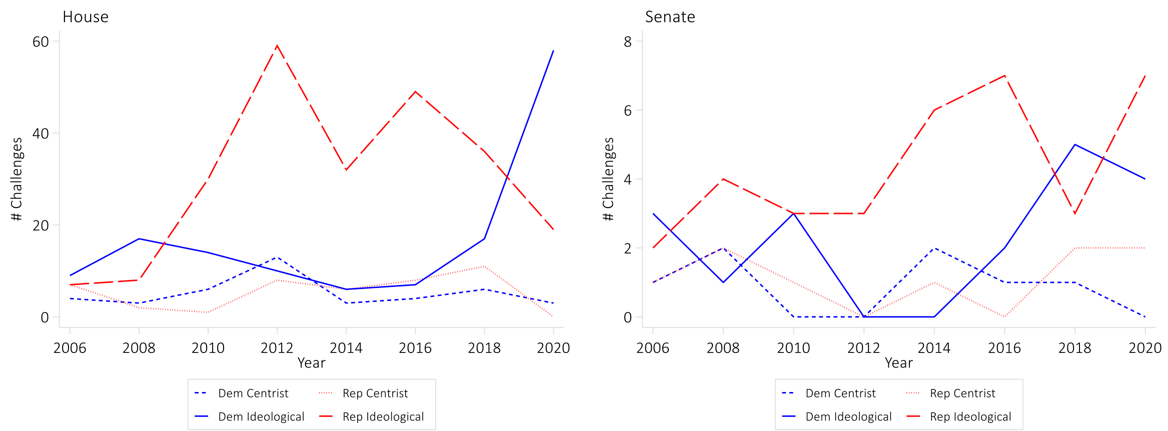


Table 11.1 Campaign Spending in Ideological & Factional Primaries

	Factional: Democratic	Factional: Republican	Ideological: Democratic	Ideological: Republican
Factional Primary	98,691***	-18,774		
	(34,144)	(36,977)		
Ideological Primary			76,127**	-33,901
			(30,553)	(36,196)
Relative District PVI +/−	4,945*	3,967*	4,353*	4,076*
	(2,748)	(2,376)	(2,634)	(2,339)
Open Primary	266,989***	239,080***	267,335***	233,487***
	(57,351)	(57,679)	(57,387)	(57,703)
Incumbent Primary	-65,199	-2,036	-58,398	-6,424
	(72,217)	(38,133)	(69,397)	(37,029)
Median Income ($10,000s)	43,725***	9,536	40,821***	10,178
	(12,739)	(8,862)	(11,578)	(8,828)
District White %	-28,424	335,680	-28,546	330,763
	(152,034)	(240,972)	(144,812)	(235,794)
Senate	1,050,964***	954,247***	1,067,845***	940,879***
	(171,135)	(128,987)	(171,215)	(125,492)
Observations	1,523	1,631	1,569	1,667
Number of districts	468	468	468	470

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

Table 11.2 Challenger Receipts in Incumbent Primaries

	Factional: Democratic	Factional: Republican	Ideological: Democratic	Ideological: Republican
Factional Primary	32,798**	15,885		
	(16,092)	(11,924)		
Ideological Primary			25,224*	10,758
			(14,737)	(8,450)
Relative District PVI +/−	-119	706	-377	351
	(683)	(1,107)	(614)	(1,027)
Median Income ($10,000s)	6,777*	4,307	7,567**	2,102
	(3,474)	(8,385)	(3,492)	(7,857)
District White %	-8,350	14,642	-27,357	20,012
	(42,434)	(68,397)	(36,946)	(67,172)
Senate	97,251*	219,792	95,851	214,291
	(56,952)	(157,513)	(58,622)	(151,514)
Constant	-26,543	-29,134	-17,964	-16,329
	(34,467)	(75,724)	(30,322)	(74,337)
Observations	548	610	573	627
Number of districts	226	248	229	252

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

Table 11.3 Regression Results for Campaign Disbursement inc. Year & State Effects

	Factional: Democratic Campaign Disbursement	Factional: Republican Campaign Disbursement	Ideological: Democratic Campaign Disbursement	Ideological: Republican Campaign Disbursement
Factional Primary	98,691***	-18,774		
	(34,144)	(36,977)		
Ideological Primary			76,127**	-33,901
			(30,553)	(36,196)
Relative District PVI +/−	4,945*	3,967*	4,353*	4,076*
	(2,748)	(2,376)	(2,634)	(2,339)
Open Primary	266,989***	239,080***	267,335***	233,487***
	(57,351)	(57,679)	(57,387)	(57,703)
Incumbent Primary	-65,199	-2,036	-58,398	-6,424
	(72,217)	(38,133)	(69,397)	(37,029)
Median Income ($10,000s)	43,725***	9,536	40,821***	10,178
	(12,739)	(8,862)	(11,578)	(8,828)
District White %	-28,424	335,680	-28,546	330,763
	(152,034)	(240,972)	(144,812)	(235,794)
Senate	1,050,964***	954,247***	1,067,845***	940,879***
	(171,135)	(128,987)	(171,215)	(125,492)
Election Year = 2008	88,917*	-40,564	74,883	-41,637
	(50,685)	(60,357)	(47,081)	(56,449)
Election Year = 2010	27,701	-18,381	23,785	-16,052
	(72,416)	(53,788)	(65,879)	(51,474)
Election Year = 2012	69,090	23,002	54,662	32,176
	(54,694)	(74,576)	(50,734)	(73,057)
Election Year = 2014	-40,699	-16,788	-45,828	-12,006
	(46,839)	(50,669)	(43,295)	(48,651)
Election Year = 2016	50,635	-20,632	42,964	-12,298
	(75,876)	(57,607)	(71,246)	(56,531)
Election Year = 2018	94,499	-24,746	89,427	-16,328
	(59,037)	(74,375)	(54,582)	(72,986)
Election Year = 2020	79,981	12,663	68,023	10,965
	(70,195)	(46,044)	(66,087)	(44,236)
State = AK	-217,785	-295,286**	-212,237	-295,646**
	(296,750)	(145,677)	(304,347)	(142,752)
State = AZ	264,614	172,168	277,992	161,087
	(185,527)	(252,326)	(185,709)	(250,464)
State = AR	466,459	-414,872***	469,387	-412,361***
	(317,629)	(157,939)	(317,201)	(157,060)
State = CA	204,462	-67,747	208,566	-76,702

	(178,472)	(100,451)	(179,075)	(102,082)
State = CO	294,231	-216,234**	321,310*	-214,727**
	(191,477)	(105,731)	(190,548)	(107,573)
State = CT	413,474*	-73,350	429,208*	-81,326
	(229,979)	(227,844)	(225,762)	(230,434)
State = DE	-335,385	-733,917**	-304,268	-727,123**
	(372,066)	(329,553)	(387,313)	(325,204)
State = FL	412,613	2,898	427,342	-1,454
	(271,206)	(156,491)	(271,233)	(153,841)
State = GA	74,573	-218,437**	80,989	-218,910**
	(178,421)	(95,375)	(179,944)	(97,258)
State = HI	-146,978	-422,316**	-124,034	-428,181**
	(206,984)	(208,600)	(207,764)	(208,122)
State = ID	-253,585	-518,290**	-234,696	-517,266**
	(350,919)	(211,890)	(344,030)	(212,672)
State = IL	156,396	-170,172	176,108	-175,586
	(177,297)	(128,153)	(177,606)	(127,127)
State = IN	92,153	-334,099***	105,519	-333,741***
	(169,775)	(101,419)	(170,372)	(100,626)
State = IA	175,430	-385,896***	185,940	-388,766***
	(255,895)	(146,692)	(257,777)	(145,416)
State = KS	-113,165	-240,714**	-119,382	-283,273**
	(252,685)	(98,294)	(253,538)	(117,840)
State = KY	554,287	-62,128	546,946	-58,528
	(357,236)	(242,788)	(357,209)	(246,324)
State = ME	-213,128	-480,133**	-214,557	-487,815**
	(458,199)	(221,972)	(451,437)	(220,844)
State = MD	406,095*	-316,395**	412,311*	-316,855**
	(224,165)	(128,453)	(219,425)	(127,146)
State = MA	719,227*	-286,300**	737,864*	-323,447***
	(399,487)	(121,846)	(400,120)	(116,509)
State = MI	86,785	-235,929**	98,956	-236,147**
	(174,472)	(108,884)	(174,643)	(109,212)
State = MN	78,392	-374,247***	96,875	-377,620***
	(181,389)	(116,678)	(182,839)	(117,193)
State = MS	-131,802	-250,173**	-129,725	-245,949**
	(258,200)	(97,893)	(258,021)	(99,135)
State = MO	220,163	-343,013***	222,107	-338,118***
	(187,652)	(102,905)	(186,590)	(103,688)
State = MT	-17,287	-541,865***	-11,893	-537,374***
	(252,910)	(186,381)	(270,087)	(183,414)
State = NE	-188,658	-481,714***	-176,261	-472,635***
	(301,603)	(156,493)	(301,762)	(147,985)
State = NV	142,475	-200,852*	160,593	-195,706*
	(174,662)	(115,472)	(174,212)	(116,104)
State = NH	444,661**	-159,025	459,442**	-162,269
	(205,966)	(131,905)	(203,710)	(133,743)
State = NJ	84,341	-252,735**	101,753	-251,489**
	(181,915)	(101,350)	(181,199)	(102,944)
State = NM	227,907	-341,891*	245,845	-337,147*
	(192,513)	(175,886)	(194,655)	(173,410)
State = NY	432,053**	-174,556	449,522**	-176,653
	(205,130)	(121,758)	(205,112)	(122,174)
State = NC	52,706	-290,319***	64,289	-287,720***
	(173,409)	(91,398)	(174,335)	(93,764)
State = ND	-14,006	-598,083**	13,751	-602,433**
	(175,955)	(248,545)	(175,121)	(241,109)
State = OH	117,912	-275,166**	126,959	-273,286**
	(173,256)	(108,555)	(173,295)	(107,566)
State = OK	-5,716	-219,585	-2,477	-216,528
	(220,684)	(145,416)	(220,118)	(144,977)
State = OR	-18,263	-422,422**	-16,985	-428,455**
	(188,876)	(168,134)	(190,027)	(166,887)
State = PA	320,670	-182,997	328,984	-187,406
	(213,336)	(116,406)	(208,369)	(116,782)
State = RI	83,076	-415,276***	69,261	-413,523***
	(254,048)	(144,058)	(259,074)	(142,123)

State = SC	14,355	-67,321	12,140	-59,344
	(203,371)	(141,806)	(206,504)	(145,115)
State = SD	179,590	-716,273**	186,921	-714,076**
	(173,844)	(358,700)	(174,050)	(353,426)
State = TN	50,669	-69,704	64,805	-83,205
	(179,256)	(166,902)	(180,157)	(164,367)
State = TX	125,794	-61,808	139,723	-62,793
	(173,127)	(146,030)	(173,864)	(146,480)
State = UT	-83,267	-155,218	-77,399	-154,142
	(329,449)	(107,743)	(332,322)	(111,079)
State = VT	-387,452	-557,745**	-403,605	-552,150**
	(392,050)	(241,426)	(342,878)	(235,255)
State = VA	115,568	-113,895	141,989	-118,127
	(187,952)	(131,396)	(187,601)	(131,846)
State = WA	98,566	-398,596***	186,871	-400,596***
	(179,343)	(135,287)	(195,107)	(135,201)
State = WV	-128,343	-657,586***	-149,758	-643,361***
	(295,617)	(211,351)	(299,773)	(200,896)
State = WI	91,282	-156,904	106,180	-153,577
	(186,397)	(157,440)	(188,062)	(159,207)
State = WY	-567,663	-573,972***	-582,928	-573,516***
	(356,649)	(201,888)	(365,229)	(201,256)
Constant	-339,294*	63,737	-323,053*	74,316
	(194,632)	(173,065)	(192,987)	(169,952)
Observations	1,523	1,631	1,569	1,667
Number of districts	468	468	468	470

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

Table 11.4 Regression Results for Incumbent Challenger Spending inc. Year & State Effects

	Factional: Democratic	Factional: Republican	Ideological: Democratic	Ideological: Republican
Factional Primary	32,798**	15,885		
	(16,092)	(11,924)		
Ideological Primary			25,224*	10,758
			(14,737)	(8,450)
Relative District PVI +/−	-119	706	-377	351
	(683)	(1,107)	(614)	(1,027)
Median Income ($10,000s)	6,777*	4,307	7,567**	2,102
	(3,474)	(8,385)	(3,492)	(7,857)
District White %	-8,350	14,642	-27,357	20,012
	(42,434)	(68,397)	(36,946)	(67,172)
Senate	97,251*	219,792	95,851	214,291
	(56,952)	(157,513)	(58,622)	(151,514)
Election Year = 2008	84,069	-15,414	71,235	-12,969
	(90,102)	(20,558)	(78,356)	(18,136)
Election Year = 2010	-20,304	-13,891	-19,233	-10,319
	(15,799)	(19,966)	(13,721)	(17,263)
Election Year = 2012	-18,257	-16,270	-20,445	-13,790
	(16,315)	(24,863)	(14,236)	(22,082)
Election Year = 2014	928.7	-9,142	-1,643	-6,094
	(21,100)	(27,862)	(19,628)	(24,174)
Election Year = 2016	-5,013	-12,245	-5,736	-8,711
	(21,604)	(28,270)	(20,084)	(24,750)
Election Year = 2018	-38,592**	-21,686	-38,616**	-14,213
	(15,373)	(25,426)	(15,522)	(22,426)
Election Year = 2020	-254.1	-24,386	-4,074	-19,362
	(17,876)	(23,267)	(16,720)	(19,869)
State = AK	-116,060*	-7,126	-116,874*	-965.0
	(62,203)	(73,009)	(64,537)	(68,260)
State = AZ	11,260	9,152	17,764	6,227
	(19,836)	(60,461)	(17,019)	(50,667)
State = AR	476,007***	-50,474	484,715***	-56,372
	(73,243)	(61,183)	(71,474)	(57,577)
State = CA	-10,893	46,653	-10,790	40,503
	(20,010)	(52,267)	(19,986)	(49,138)

State = CO	202,429***	52,733	213,110***	46,350
	(49,095)	(60,189)	(45,700)	(58,360)
State = CT	-	-	-	-
State = DE	-37,023	-	-27,477	-
	(70,179)		(68,328)	
State = FL	50,667	254,685	51,431	250,431
	(39,795)	(262,124)	(39,987)	(261,990)
State = GA	-16,973	-11,691	-13,842	-17,912
	(27,047)	(39,752)	(24,501)	(39,046)
State = HI	-32,260	18,790	-31,678	12,834
	(40,119)	(75,714)	(42,458)	(71,779)
State = ID	-	-71,684	-	-72,583
		(80,197)		(78,423)
State = IL	19,476	5,341	26,037	3,581
	(35,779)	(55,679)	(33,500)	(54,493)
State = IN	25,045	-155.9	29,115	-4,880
	(35,832)	(41,108)	(30,065)	(39,775)
State = IA	3,412	-9,983	15,530	-13,075
	(55,812)	(43,607)	(45,703)	(41,781)
State = KS	-	-36,524	-	-39,848
		(47,582)		(45,503)
State = KY	7,873	4,955	-379.5	-170.0
	(14,710)	(38,248)	(15,430)	(36,621)
State = ME	-	-	-	-
State = MD	-27,968	3,960	-22,593	4,117
	(29,748)	(50,551)	(27,379)	(48,837)
State = MA	81,272*	-	88,663*	-
	(49,007)		(47,749)	
State = MI	1,195	42,810	5,125	37,116
	(23,143)	(64,427)	(19,903)	(64,031)
State = MN	-10,776	-40,528	-13,474	-43,520
	(45,019)	(61,099)	(49,107)	(58,647)
State = MS	9,291	81,545	9,262	80,446
	(19,872)	(99,185)	(19,487)	(98,183)
State = MO	-11,222	-41,415	-8,555	-38,054
	(30,639)	(47,787)	(29,216)	(44,855)
State = MT	-92,399	-60,830	-110,742	-62,515
	(66,368)	(105,939)	(74,530)	(102,201)
State = NE	-	-53,710	-	-58,494
		(62,036)		(62,005)
State = NV	-17,003	-46,772	-16,724	-51,002
	(18,578)	(67,306)	(17,965)	(64,655)
State = NH	-98,438	-97,359	-83,010	-98,892
	(65,340)	(119,586)	(60,644)	(114,633)
State = NJ	112,778	-8,322	103,578	-5,331
	(81,301)	(64,259)	(75,472)	(60,819)
State = NM	24,089**	42.91	24,332**	-2,776
	(10,914)	(51,923)	(10,536)	(50,335)
State = NY	77,054**	35,363	76,412**	34,382
	(37,952)	(58,545)	(37,443)	(55,722)
State = NC	-11,186	5,966	-4,541	-2,616
	(24,720)	(42,249)	(21,477)	(41,528)
State = ND	-	-	-	-
State = OH	24,847	-16,730	31,788	-18,581
	(26,664)	(44,950)	(21,919)	(43,286)
State = OK	13,881	-12,386	-19,010	-12,756
	(34,591)	(59,342)	(32,511)	(57,456)
State = OR	-30,417	-11,870	-24,324	-106,170
	(37,453)	(40,325)	(34,536)	(99,274)
State = PA	-2,578	31,850	9,979	33,146
	(28,512)	(52,579)	(23,366)	(50,853)
State = RI	-655.6	46,834	324.0	48,781
	(25,481)	(152,567)	(25,922)	(144,498)
State = SC	17,433*	-53,169	6,038	-56,800

	(9,084)	(55,325)	(10,651)	(52,903)
State = SD	-	-84,094	-	-86,038
		(106,163)		(102,450)
State = TN	5,390	-7,815	5,553	-11,962
	(15,826)	(43,828)	(15,286)	(42,526)
State = TX	63,337	15,871	63,537	14,551
	(47,294)	(42,904)	(47,050)	(41,853)
State = UT	-5,035	91,438	438.0	97,248
	(25,857)	(73,121)	(24,131)	(70,252)
State = VT	-51,754	-	-55,385	-
	(63,586)		(61,559)	
State = VA	-47,228	-2,725	-31,492	680
	(43,948)	(54,702)	(36,770)	(51,703)
State = WA	-47,258	-5,956	-38,139	-7,220
	(43,843)	(47,868)	(41,708)	(45,876)
State = WV	-67,187	-108,417	-70,369	-74,422
	(68,674)	(111,512)	(68,955)	(78,506)
State = WI	-28,470	31,206	-14,439	27,534
	(36,836)	(55,231)	(29,600)	(53,310)
State = WY	-	-53,730	-	-50,311
		(77,057)		(74,059)
Constant	-26,543	-29,134	-17,964	-16,329
	(34,467)	(75,724)	(30,322)	(74,337)
Observations	548	610	573	627
Number of districts	226	248	229	252

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

Table 11.5 Full Results for Turnout

	Factional: Democratic	Factional: Republican	Ideological: Democratic	Ideological: Republican
Factional Primary	0.000	0.001		
	(0.002)	(0.001)		
Ideological Primary			0.001	0.000
			(0.002)	(0.001)
Relative District PVI +/−	0.002***	0.002***	0.002***	0.002***
	(0.000)	(0.000)	(0.000)	(0.000)
District White %	0.077***	0.040***	0.074***	0.039***
	(0.017)	(0.009)	(0.016)	(0.009)
Median Income ($10,000s)	0.003***	0.001	0.003***	0.001
	(0.001)	(0.001)	(0.001)	(0.001)
Open Primary	0.008***	0.013***	0.009***	0.013***
	(0.002)	(0.002)	(0.002)	(0.002)
Incumbent Primary	0.016***	0.007***	0.016***	0.007***
	(0.004)	(0.002)	(0.004)	(0.002)
Election Year = 2008	0.024***	-0.009***	0.023***	-0.011***
	(0.005)	(0.003)	(0.005)	(0.003)
Election Year = 2010	-0.012***	0.009***	-0.014***	0.008***
	(0.003)	(0.003)	(0.003)	(0.003)
Election Year = 2012	-0.012***	0.007**	-0.013***	0.006**
	(0.004)	(0.003)	(0.004)	(0.003)
Election Year = 2014	-0.031***	-0.007***	-0.031***	-0.008***
	(0.003)	(0.003)	(0.003)	(0.003)
Election Year = 2016	0.009**	0.014***	0.008**	0.014***
	(0.004)	(0.004)	(0.004)	(0.004)
Election Year = 2018	0.006*	0.004	0.006*	0.004
	(0.003)	(0.003)	(0.003)	(0.003)
Election Year = 2020	0.043***	0.021***	0.042***	0.020***
	(0.004)	(0.003)	(0.004)	(0.003)
State = AK	-0.007	0.009	-0.008	0.009
	(0.013)	(0.015)	(0.013)	(0.015)
State = AZ	-0.002	-0.020***	-0.003	-0.020***
	(0.021)	(0.007)	(0.021)	(0.007)
State = AR	0.038**	-0.063***	0.039**	-0.063***
	(0.019)	(0.013)	(0.019)	(0.013)
State = CA	-0.005	-0.003	-0.007	-0.004

	(0.015)	(0.008)	(0.015)	(0.008)
State = CO	-0.004	-0.026***	-0.005	-0.025***
	(0.017)	(0.007)	(0.017)	(0.007)
State = CT	-0.067***	-0.069***	-0.068***	-0.069***
	(0.018)	(0.007)	(0.018)	(0.007)
State = DE	-0.052***	-0.050***	-0.052***	-0.050***
	(0.017)	(0.007)	(0.017)	(0.007)
State = FL	-0.037***	-0.037***	-0.037***	-0.037***
	(0.014)	(0.006)	(0.014)	(0.006)
State = GA	-0.021	-0.038***	-0.021	-0.039***
	(0.014)	(0.007)	(0.014)	(0.007)
State = HI	0.092***	-0.033***	0.090***	-0.033***
	(0.016)	(0.007)	(0.015)	(0.007)
State = ID	-0.044***	-0.038***	-0.045***	-0.038***
	(0.013)	(0.006)	(0.013)	(0.006)
State = IL	-0.007	-0.020**	-0.005	-0.020**
	(0.016)	(0.008)	(0.017)	(0.008)
State = IN	-0.030**	-0.026***	-0.029**	-0.027***
	(0.015)	(0.008)	(0.014)	(0.008)
State = IA	-0.073***	-0.061***	-0.072***	-0.060***
	(0.015)	(0.007)	(0.014)	(0.007)
State = KS	-0.040***	-0.011*	-0.040***	-0.011
	(0.014)	(0.007)	(0.013)	(0.007)
State = KY	0.036**	-0.066***	0.036**	-0.066***
	(0.017)	(0.009)	(0.017)	(0.009)
State = ME	-0.063***	-0.056***	-0.062***	-0.056***
	(0.017)	(0.007)	(0.016)	(0.007)
State = MD	0.000	-0.034***	-0.001	-0.034***
	(0.015)	(0.008)	(0.015)	(0.008)
State = MA	-0.023	-0.061***	-0.023	-0.061***
	(0.017)	(0.008)	(0.017)	(0.007)
State = MI	-0.023	-0.009	-0.024	-0.009
	(0.015)	(0.007)	(0.015)	(0.007)
State = MN	-0.035**	-0.077***	-0.038**	-0.077***
	(0.016)	(0.008)	(0.015)	(0.008)
State = MS	0.013	-0.021*	0.011	-0.021*
	(0.017)	(0.012)	(0.017)	(0.012)
State = MO	-0.025	-0.017**	-0.024	-0.017**
	(0.015)	(0.007)	(0.015)	(0.007)
State = MT	0.031**	0.033***	0.033**	0.033***
	(0.014)	(0.006)	(0.014)	(0.006)
State = NE	-0.026**	-0.005	-0.026**	-0.006
	(0.013)	(0.013)	(0.013)	(0.012)
State = NV	-0.058***	-0.049***	-0.060***	-0.049***
	(0.015)	(0.010)	(0.016)	(0.009)
State = NH	-0.065***	-0.028***	-0.065***	-0.028***
	(0.018)	(0.007)	(0.018)	(0.007)
State = NJ	-0.073***	-0.071***	-0.075***	-0.071***
	(0.015)	(0.007)	(0.015)	(0.007)
State = NM	-0.003	-0.037***	-0.003	-0.037***
	(0.015)	(0.007)	(0.015)	(0.008)
State = NY	-0.096***	-0.084***	-0.096***	-0.084***
	(0.015)	(0.007)	(0.015)	(0.007)
State = NC	-0.007	-0.058***	-0.007	-0.058***
	(0.014)	(0.007)	(0.014)	(0.007)
State = ND	-0.070***	-0.008	-0.070***	-0.007
	(0.014)	(0.008)	(0.013)	(0.008)
State = OH	-0.026*	-0.027***	-0.026*	-0.026***
	(0.015)	(0.007)	(0.014)	(0.007)
State = OK	0.014	-0.071***	0.013	-0.071***
	(0.019)	(0.010)	(0.018)	(0.010)
State = OR	-0.000	-0.020**	-0.001	-0.017**
	(0.015)	(0.008)	(0.015)	(0.008)
State = PA	-0.017	-0.035***	-0.018	-0.034***
	(0.015)	(0.008)	(0.015)	(0.008)
State = RI	-0.053**	-0.063***	-0.053**	-0.063***
	(0.021)	(0.013)	(0.021)	(0.012)

State = SC	-0.037***	-0.046***	-0.037***	-0.046***
	(0.014)	(0.008)	(0.014)	(0.008)
State = SD	-0.030**	-0.027***	-0.029**	-0.027***
	(0.014)	(0.008)	(0.013)	(0.008)
State = TN	-0.034**	-0.032***	-0.033**	-0.033***
	(0.015)	(0.008)	(0.014)	(0.008)
State = TX	-0.027*	-0.049***	-0.028**	-0.050***
	(0.014)	(0.006)	(0.014)	(0.006)
State = UT	-0.045***	-0.035**	-0.045***	-0.035**
	(0.014)	(0.017)	(0.014)	(0.017)
State = VT	-0.052***	-0.042***	-0.056***	-0.042***
	(0.019)	(0.008)	(0.017)	(0.008)
State = VA	-0.075***	-0.069***	-0.076***	-0.069***
	(0.015)	(0.008)	(0.015)	(0.008)
State = WA	0.012	0.009	0.012	0.010
	(0.015)	(0.010)	(0.015)	(0.010)
State = WV	0.029**	-0.077***	0.029**	-0.076***
	(0.015)	(0.011)	(0.015)	(0.010)
State = WI	-0.052***	-0.027***	-0.051***	-0.027***
	(0.016)	(0.009)	(0.015)	(0.009)
State = WY	-0.035***	0.041***	-0.035***	0.041***
	(0.013)	(0.006)	(0.013)	(0.006)
Senate	0.001	0.002	0.001	0.002
	(0.002)	(0.002)	(0.002)	(0.002)
Observations	1,555	1,683	1,606	1,724
Number of districts	470	468	470	470

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

Many of the patterns in the controls in Table 11.5 for both parties align with the existing literature on primary voter participation. As expected, district partisanship is positively correlated with turnout, where turnout in a given party's primary is higher in districts where that party is electorally stronger. District whiteness (both parties) and median income (Democratic Party only) were also positively correlated with turnout, in line with research showing that primary electorates are whiter than the districts from which they emanate, and that citizens with higher incomes participate at higher rates in primary elections (Kamarck and Podkul 2018a). Economic and racial inequality remains the major cause of unequal electoral participation (Bartle, Birch, and Skirmuntt 2017; Dahl 2006), with disparate levels of access to polling places a particularly acute problem (McClendon et al. 2019) meaning that both a direct and informational cost of voting continue to influence who participates in electoral politics (Blais et al. 2019). Higher participation in wealthier districts may also partly reflect campaign spending and attention from candidates, as previously shown in Table 11.5.[245] Given the focus of this thesis on candidate positions, an examination of the ability of voters to participate in primaries is beyond the scope of this study, though these—unfortunately

[245] Higher spending by candidates may also be due to higher campaign costs for advertising, office space and staff in districts with higher median incomes.

unsurprising—relationships are cause for further alarm given the increased importance and ubiquity of contested primary elections in the twenty-first century.

Alongside these district-level patterns, the primary-level controls also perform as expected. In both parties, open and incumbent primaries receive higher turnout that challenger races (the base category). Interestingly, Republican open contests receive comparatively higher turnout than incumbent races, among Democratic contests this pattern is reversed; likely a product of the clustering of Democratic voters in urban districts, producing very safe Democratic constitutencies but with comparatively fewer voters spread in less favored districts. Senate races are not significantly different in terms of percentage turnout than House primaries, likely because these primaries take place the same day, meaning that voters who participate in one contest likely cast ballots in both.

Table 11.6 Fractionalization Results including State Effects

	Factional: Democratic	Factional: Republican	Ideological: Democratic	Ideological: Republican
Factional Primary	-0.009	0.002		
	(0.008)	(0.008)		
Ideological Primary			-0.011	0.009
			(0.008)	(0.008)
Relative District PVI +/–	-0.000	0.002***	-0.001	0.002***
	(0.001)	(0.001)	(0.001)	(0.001)
District White %	-0.091**	0.026	-0.093**	0.026
	(0.039)	(0.036)	(0.039)	(0.036)
Median Income ($10,000s)	0.003	0.005	0.003	0.005
	(0.003)	(0.004)	(0.003)	(0.004)
Incumbent Primary	-0.186***	-0.231***	-0.187***	-0.236***
	(0.014)	(0.011)	(0.014)	(0.011)
Open Primary	0.045***	0.039***	0.044***	0.037***
	(0.012)	(0.012)	(0.012)	(0.012)
Senate	-0.015	-0.010	-0.016	-0.013
	(0.015)	(0.012)	(0.016)	(0.012)
Election Year = 2008	0.005	0.010	0.008	0.013
	(0.018)	(0.017)	(0.017)	(0.016)
Election Year = 2010	-0.004	0.043***	-0.005	0.041***
	(0.017)	(0.015)	(0.016)	(0.015)
Election Year = 2012	-0.027*	0.017	-0.020	0.020
	(0.016)	(0.016)	(0.016)	(0.016)
Election Year = 2014	-0.040**	0.020	-0.034**	0.023
	(0.016)	(0.016)	(0.016)	(0.016)
Election Year = 2016	-0.026	0.030*	-0.019	0.033**
	(0.017)	(0.016)	(0.016)	(0.016)
Election Year = 2018	0.012	0.032*	0.019	0.034**
	(0.015)	(0.017)	(0.015)	(0.017)
Election Year = 2020	0.055***	0.080***	0.064***	0.081***
	(0.018)	(0.018)	(0.018)	(0.018)
State = AK	-0.010	0.002	-0.011	0.004
	(0.044)	(0.039)	(0.044)	(0.039)
State = AZ	0.080***	-0.027	0.079***	-0.032
	(0.026)	(0.029)	(0.026)	(0.029)
State = AR	0.224***	-0.128***	0.226***	-0.129***
	(0.037)	(0.039)	(0.038)	(0.039)
State = CA	0.078***	-0.028	0.076***	-0.033
	(0.025)	(0.029)	(0.025)	(0.029)
State = CO	0.056*	-0.014	0.056*	-0.016
	(0.031)	(0.056)	(0.032)	(0.056)

State = CT	0.028	-0.116**	0.030	-0.115**
	(0.074)	(0.047)	(0.073)	(0.047)
State = DE	0.106***	-0.160***	0.105***	-0.162***
	(0.027)	(0.032)	(0.027)	(0.032)
State = FL	0.061**	-0.041	0.062**	-0.047*
	(0.028)	(0.028)	(0.028)	(0.028)
State = GA	0.087***	-0.045	0.087***	-0.046
	(0.031)	(0.033)	(0.031)	(0.033)
State = HI	0.041	-0.166***	0.043	-0.166***
	(0.034)	(0.063)	(0.034)	(0.063)
State = ID	-0.055*	-0.044	-0.045	-0.043
	(0.029)	(0.029)	(0.031)	(0.028)
State = IL	0.082***	-0.080**	0.080***	-0.078**
	(0.029)	(0.031)	(0.029)	(0.031)
State = IN	0.121***	0.010	0.118***	0.009
	(0.031)	(0.036)	(0.032)	(0.036)
State = IA	0.131***	-0.048	0.131***	-0.049
	(0.037)	(0.038)	(0.036)	(0.038)
State = KS	0.054**	-0.006	0.055**	-0.005
	(0.026)	(0.029)	(0.026)	(0.028)
State = KY	0.066**	-0.136***	0.067**	-0.137***
	(0.030)	(0.043)	(0.031)	(0.043)
State = ME	0.070	-0.082	0.073*	-0.084
	(0.044)	(0.053)	(0.044)	(0.054)
State = MD	0.056	0.005	0.054	0.004
	(0.039)	(0.036)	(0.040)	(0.035)
State = MA	0.129***	-0.108***	0.132***	-0.115***
	(0.040)	(0.041)	(0.040)	(0.040)
State = MI	0.098**	-0.052	0.095**	-0.053
	(0.042)	(0.034)	(0.041)	(0.033)
State = MN	-0.010	-0.194***	-0.002	-0.196***
	(0.046)	(0.033)	(0.045)	(0.032)
State = MS	0.041	-0.052	0.046	-0.054
	(0.044)	(0.049)	(0.042)	(0.049)
State = MO	0.139***	-0.056	0.142***	-0.055*
	(0.042)	(0.035)	(0.041)	(0.033)
State = MT	0.093*	-0.099***	0.081*	-0.100***
	(0.052)	(0.027)	(0.042)	(0.027)
State = NE	0.010	-0.090***	0.006	-0.095***
	(0.029)	(0.029)	(0.028)	(0.028)
State = NV	0.069	0.024	0.063	0.009
	(0.052)	(0.045)	(0.052)	(0.046)
State = NH	-0.040	-0.009	-0.038	-0.009
	(0.101)	(0.035)	(0.100)	(0.034)
State = NJ	-0.003	-0.116***	-0.007	-0.119***
	(0.027)	(0.035)	(0.027)	(0.035)
State = NM	0.085	-0.102***	0.085	-0.104***
	(0.056)	(0.037)	(0.056)	(0.037)
State = NY	0.139***	-0.159***	0.138***	-0.161***
	(0.029)	(0.033)	(0.029)	(0.033)
State = NC	0.092***	0.002	0.092***	-0.001
	(0.026)	(0.029)	(0.026)	(0.028)
State = ND	-0.026	-0.291***	-0.029	-0.292***
	(0.025)	(0.039)	(0.025)	(0.040)
State = OH	0.072**	-0.100***	0.073**	-0.105***
	(0.031)	(0.033)	(0.031)	(0.032)
State = OK	0.087***	-0.059*	0.083***	-0.060*
	(0.024)	(0.035)	(0.023)	(0.035)
State = OR	0.040	-0.099**	0.038	-0.102**
	(0.043)	(0.045)	(0.043)	(0.042)
State = PA	0.118***	-0.056*	0.119***	-0.057*
	(0.029)	(0.032)	(0.029)	(0.032)
State = RI	0.167***	-0.187***	0.173***	-0.189***
	(0.057)	(0.049)	(0.057)	(0.049)
State = SC	0.048	0.001	0.049	-0.000
	(0.031)	(0.046)	(0.030)	(0.046)
State = SD	-0.017	-0.084***	-0.020	-0.083***

	(0.025)	(0.027)	(0.025)	(0.026)
State = TN	0.068**	-0.020	0.056*	-0.038
	(0.034)	(0.029)	(0.032)	(0.029)
State = TX	0.087***	-0.039	0.085***	-0.040
	(0.028)	(0.028)	(0.028)	(0.028)
State = UT	0.054	-0.059	0.053	-0.058
	(0.049)	(0.051)	(0.051)	(0.051)
State = VT	-0.060*	-0.040	-0.092**	-0.044
	(0.033)	(0.034)	(0.038)	(0.034)
State = VA	0.027	-0.080**	0.025	-0.082**
	(0.038)	(0.040)	(0.038)	(0.040)
State = WA	0.113**	-0.069*	0.106*	-0.071**
	(0.052)	(0.036)	(0.056)	(0.036)
State = WV	0.142***	-0.055	0.144***	-0.057
	(0.035)	(0.047)	(0.034)	(0.043)
State = WI	-0.001	-0.160***	0.018	-0.163***
	(0.034)	(0.030)	(0.039)	(0.030)
State = WY	0.121**	-0.070**	0.121**	-0.068**
	(0.056)	(0.034)	(0.058)	(0.033)
Constant	0.507***	0.563***	0.503***	0.563***
	(0.033)	(0.036)	(0.033)	(0.036)
Observations	1,555	1,683	1,606	1,724
Number of districts	470	468	470	470

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

Figure 11.21 Primary Competitiveness

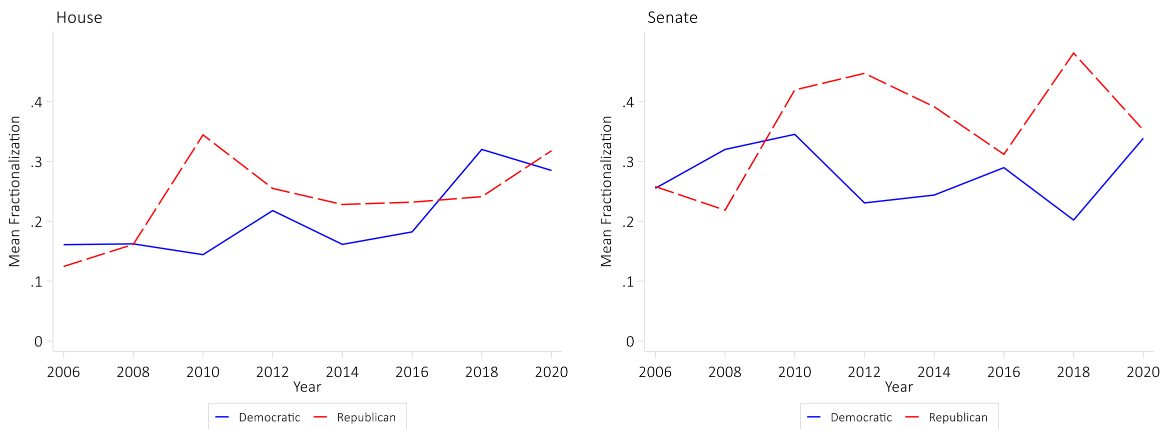


Figure 11.22 Primary Competitiveness (Contested Only)

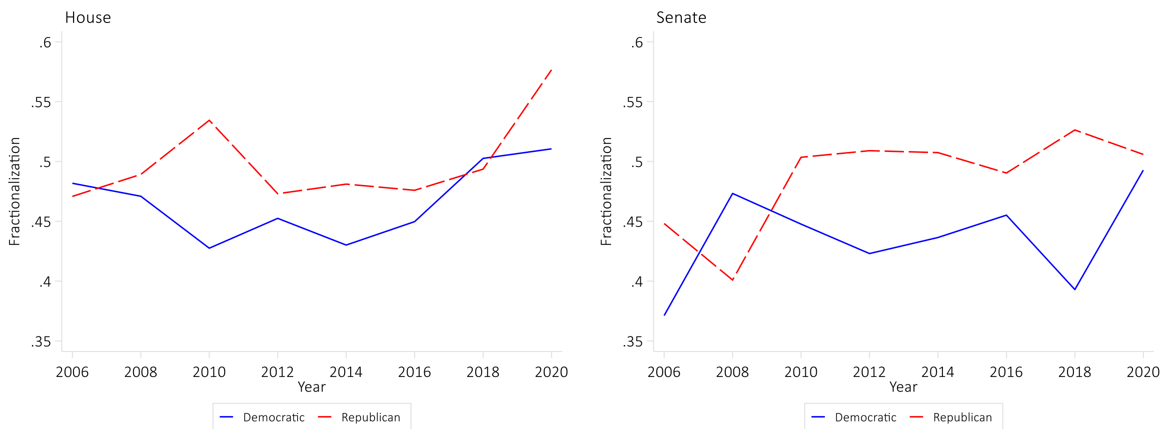


Figure 11.23 Distribution of Error Terms of Second Receipts

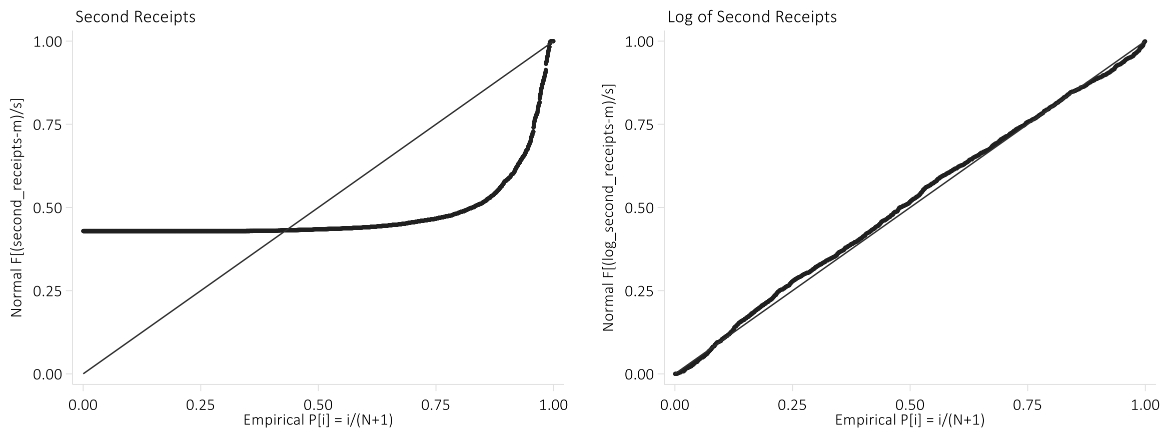


Table 11.7 Log of Incumbent Challenger Spending

	log_second_receipts Factional: Democratic	log_second_receipts Factional: Republican	log_second_receipts Ideological: Democratic	log_second_receipts Ideological: Republican
Factional Primary	0.644**	0.090	-	-
	(0.253)	(0.240)		
Ideological Primary	-	-	0.497**	-0.359
			(0.247)	(0.253)
Relative District PVI +/−	0.016	0.014	0.009	0.015
	(0.013)	(0.017)	(0.012)	(0.015)
Median Income ($10,000s)	0.072	0.113*	0.098*	0.125*
	(0.061)	(0.066)	(0.057)	(0.064)
District White %	-0.261	-1.402*	-0.659	-1.392*
	(0.674)	(0.820)	(0.655)	(0.776)
Senate	0.646	1.381***	0.659	1.426***
	(0.473)	(0.474)	(0.484)	(0.456)
Constant	8.587***	9.296***	8.717***	9.491***
	(0.603)	(0.747)	(0.587)	(0.733)
Observations	288	394	292	398
Number of districts	170	209	171	212

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

11.2 Chapter Five

Table 11.8 % PAC Contributions & Realigner Faction Candidates

	Realigner Faction (nonzero PAC $)	Realigner Faction (all)
% PAC Contributions	-0.708***	-0.378**
	(0.218)	(0.182)
Relative District PVI +/−	0.050***	0.006***
	(0.005)	(0.002)
Senate	-0.286**	-0.178*
	(0.126)	(0.091)
Median Income ($10,000s)	-0.054**	-0.048***
	(0.026)	(0.018)
District White %	-0.326	-0.671***
	(0.223)	(0.140)
Incumbent	-0.135	0.216**
	(0.108)	(0.094)
Republican	0.138	0.074
	(0.089)	(0.058)
Constant	0.025	0.327**
	(0.231)	(0.148)
Observations	2,707	5,177

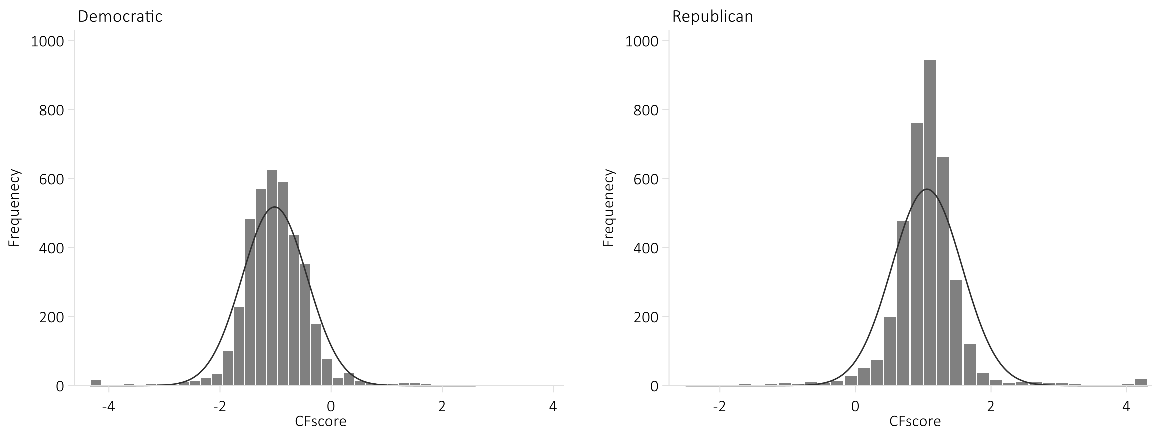
Robust standard errors in parentheses
*** $p<0.01$, ** $p<0.05$, * $p<0.1$

Table 11.9 % PAC Contributions and Candidate CFscores

	Democratic CFscore	Republican CFscore
% PAC Contributions	0.270***	-0.211***
	(0.068)	(0.044)
Relative District PVI +/−	-0.002	0.006***
	(0.002)	(0.001)
Senate	0.068	0.006
	(0.042)	(0.028)
Median Income ($10,000s)	-0.070***	-0.027***
	(0.011)	(0.009)
District White %	-0.325***	0.057
	(0.084)	(0.087)
Incumbent	0.231***	-0.084***
	(0.037)	(0.024)
Constant	-0.504***	1.155***
	(0.088)	(0.092)
Observations	1,137	1,179
R-squared	0.279	0.115

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

Figure 11.24 Distribution of CFscores



11.3 Chapter Six

These appendices feature additional data for this chapter including descriptive statistics, details of district assignment and robustness checks.

11.3.1 Descriptive Statistics

Table 11.10 Correlation Between Variables

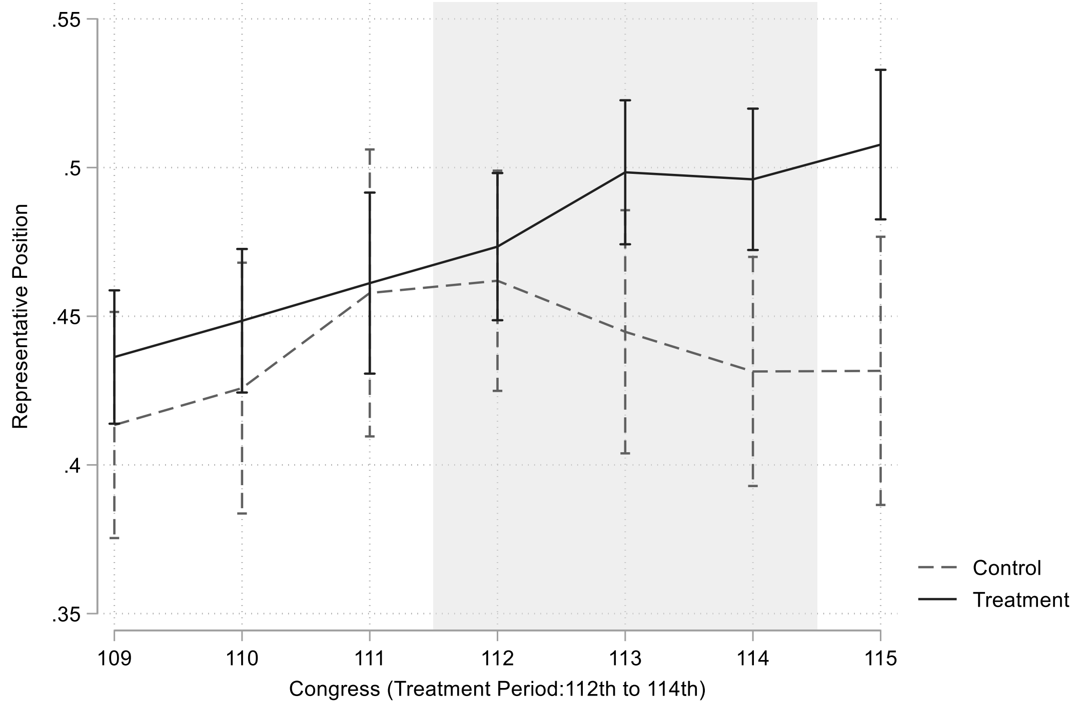
Variables	(1)	(2)	(3)	(4)	(5)	(6)
(1) District Nokken Poole (DV)	1.000					
(2) Factional Primary (Treatment)	0.097	1.000				
(3) District Median Income (Control)	-0.031	0.013	1.000			
(4) District % White (Control)	0.107	0.003	0.120	1.000		
(5) Median Age (Control)	-0.086	0.016	0.004	0.293	1.000	
(6) Urban–Rural (Control)	-0.021	0.051	0.113	0.009	0.061	1.000

11.3.2 District Assignment

Table 11.11 Districts in Treatment/Control Groups

	Pre	Post
Control	42	54
Treated	140	187
Total	182	241

Figure 11.25 PTA Using Unweighted Figures



11.3.3 Robustness Checks

The below section shows the results of the robustness checks. In Table 11.12 I restrict the analysis only to primary elections where the second placed candidate received more than twenty-five percent of the vote. The effect size increases when I only consider primaries when vote share is thresholded.

Table 11.12 Primaries with 25% Threshold

	Leg Position
2016 (time)	–0.026
	(0.020)
Factional Primary (>25%)	0.044*
	(0.026)
Diff-in-diff	0.089***
	(0.029)
Observations	423
R-squared	0.091
Mean Control 2008	0.437
	(0.018)
Mean Treated 2008	0.481
	(0.019)
Diff 2008	0.044
	(0.026)
Mean Control 2016	0.411
	(0.017)
Mean Treated 2016	0.543
	(0.014)
Diff 2016	0.133
	(0.022)

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

As with the results in Table 11.12, the results presented in Table 11.13—where I only include primaries where the non-winning candidate in Republican primaries filed an FEC report—retain significance and increase in size.

Table 11.13 Primaries with FEC Filing Threshold

	Leg Position
2016 (time)	-0.032
	(0.029)
Factional Primary (receipts)	-0.005
	(0.028)
Diff-in-diff	0.082**
	(0.034)
Observations	423
R-squared	0.027
Mean Control 2008	0.464
	(0.023)
Mean Treated 2008	0.459
	(0.016)
Diff 2008	-0.005
	(0.028)
Mean Control 2016	0.432
	(0.024)
Mean Treated 2016	0.509
	(0.013)
Diff 2016	0.077
	(0.027)

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

One potential counterargument to the findings is that 2010 was an unusual year, with many Tea Party candidates standing in primary elections and the party performing unusually well in a 'wave' election that November. The finding is consistent only using 2012 and 2014 primaries within the treatment, as shown in Table 11.14.

Table 11.14 Only 2012 and 2014 Primaries

	Leg Position
2016 (time)	–0.009
	(0.022)
Factionalism (12-14 only)	0.033
	(0.027)
Diff-in-diff	0.060**
	(0.030)
Observations	423
R-squared	0.048
Mean Control 2008	0.441
	(0.020)
Mean Treated 2008	0.474
	(0.018)
Diff 2008	0.033
	(0.027)
Mean Control 2016	0.432
	(0.017)
Mean Treated 2016	0.525
	(0.014)
Diff 2016	0.094
	(0.022)

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

I also repeat the main analysis including 2016 factional primaries, followed the same method as outlined in the main text, though official endorsements or associations with the Tea Party were scarcer in this election cycle. The inclusion of the 2016 cycle produced results that included no gap during the analysis, with every primary election included in either the pre-treatment, treatment, or post-treatment period. Including primaries from 2016 moved eighteen districts from the control to the treatment group. The results in Table 11.15 are consistent with the main finding.

Table 11.15 Also including 2016 primaries

	Leg Position
2016 (time)	-0.025
	(0.033)
Factionalism (any TP candidate)	-0.001
	(0.033)
Diff-in-diff	0.066*
	(0.037)
Observations	423
R-squared	0.021
Mean Control 2008	0.461
	(0.030)
Mean Treated 2008	0.460
	(0.014)
Diff 2008	-0.001
	(0.033)
Mean Control 2016	0.436
	(0.027)
Mean Treated 2016	0.502
	(0.013)
Diff 2016	0.066
	(0.029)

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

Table 11.16 Alternative Estimators

	Coef	Std.Err.	z	P>z	[95%Conf.	Interval]
Doubly Robust IPW	0.069	0.033	2.100	0.036	0.004	0.133
Doubly Robust Improved estimator	0.069	0.033	2.100	0.036	0.004	0.133
Outcome Regression	0.069	0.033	2.100	0.036	0.004	0.133
Abadie (2005) IPW estimator	0.098	0.064	1.520	0.128	-0.028	0.223
Standardized IPW estimator	0.069	0.033	2.100	0.036	0.004	0.133

Academic discourse around the optimal estimator for conducting DiD analyses has been ongoing during the period in which this thesis was written. Without wishing to make any methodological commentary about approaches to DiD studies, I am keen to demonstrate that my finding is not an artifact of the estimator used. Table 11.16 presents the main results using a series of alternative DiD estimators.

11.3.4 Ideological Primaries

I repeat the main analysis for chapter six using ideological primaries during the period in question. The effect of ideological primaries during this time appears substantively smaller and less significant, though representatives in districts which hosted ideological primaries also moved further to the right during the period of analysis than Republicans in the control districts, as shown in Figure 11.26 and Table 11.17.

Figure 11.26 Ideological Primaries PTA & Means

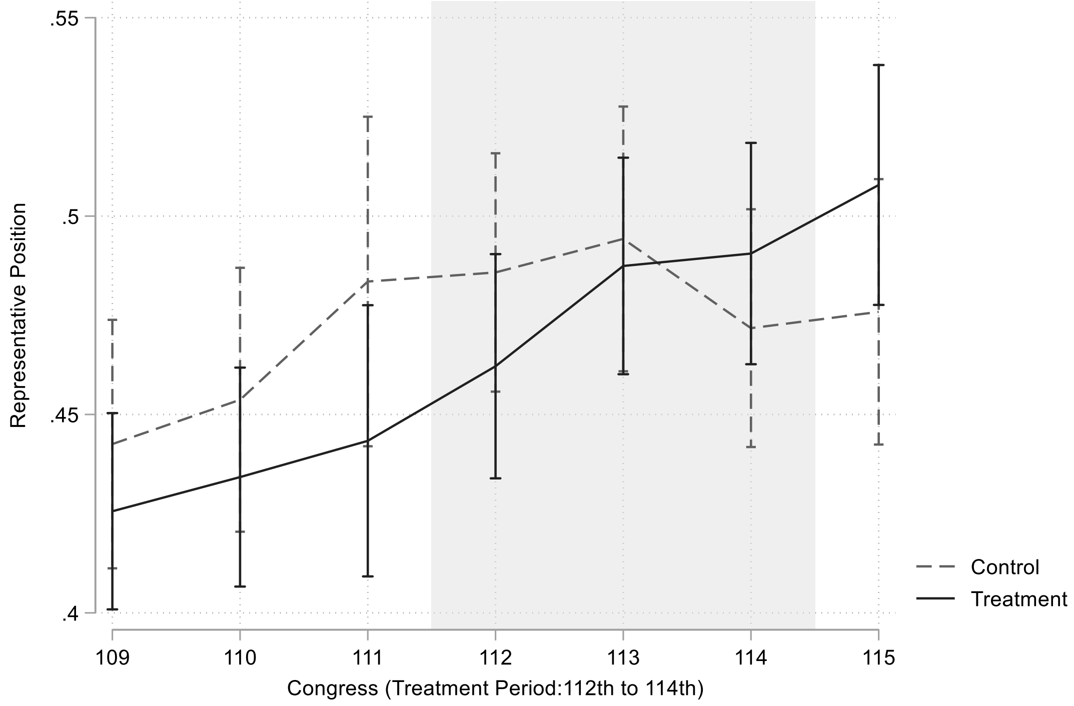


Table 11.17 Ideological Primary Results

	Leg Position
2016 (time)	0.001
	(0.024)
Ideological Primary (treatment)	-0.035
	(0.028)
Diff-in-diff	0.059*
	(0.030)
Observations	423
R-squared	0.017
Mean Control 2008	0.475
	(0.022)
Mean Treated 2008	0.440
	(0.017)
Diff 2008	-0.035
	(0.028)
Mean Control 2016	0.476
	(0.018)
Mean Treated 2016	0.501
	(0.015)
Diff 2016	0.024
	(0.023)

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

11.4 Chapter Seven

11.4.1 Main Results with Controls

Table 11.18 Factional Primaries: Candidate Level Analysis

DV = Primary Winner	xtlogit Democratic	xtlogit Republican	melogit Democratic	melogit Republican
Realigner	-0.101	-0.204	-0.101	-0.204
	(0.412)	(0.301)	(0.996)	(0.917)
Incumbent	5.714***	5.197***	5.713***	5.197***
	(0.663)	(0.515)	(0.455)	(0.371)
Quality Candidate	1.019***	0.877***	1.019***	0.877***
	(0.213)	(0.184)	(0.209)	(0.167)
Female Candidate	0.702***	-0.166	0.702***	-0.166
	(0.158)	(0.197)	(0.151)	(0.182)
Campaign Spending ($10,000s)	0.005	0.005	0.005***	0.005*
	(0.003)	(0.005)	(0.002)	(0.003)
Realigner # Relative PVI	0.005	0.008**	0.005	0.008
	(0.008)	(0.004)	(0.019)	(0.017)
Realigner # Median Income ($10,000s)	-0.014	0.045*	-0.014	0.045
	(0.037)	(0.024)	(0.103)	(0.091)
Realigner # District White %	-0.413	-0.160	-0.413	-0.160
	(0.331)	(0.178)	(0.963)	(0.826)
Realigner # Senate	0.399**	-0.043	0.399	-0.043
	(0.195)	(0.094)	(0.539)	(0.393)
Realigner # Incumbent Primary	0.167	-0.084	0.167	-0.084
	(0.298)	(0.100)	(0.666)	(0.531)
Realigner # Open Primary	-0.119	-0.124	-0.119	-0.124
	(0.200)	(0.125)	(0.432)	(0.371)
Realigner # 2008	0.532*	0.074	0.532	0.074
	(0.293)	(0.242)	(0.750)	(0.778)
Realigner # 2010	0.455	0.039	0.455	0.039
	(0.305)	(0.209)	(0.862)	(0.662)
Realigner # 2012	0.391	0.101	0.391	0.101
	(0.300)	(0.206)	(0.705)	(0.691)
Realigner # 2014	0.439	0.060	0.439	0.060
	(0.335)	(0.240)	(0.736)	(0.730)
Realigner # 2016	0.406	-0.024	0.406	-0.024
	(0.304)	(0.224)	(0.663)	(0.738)
Realigner # 2018	0.354	0.006	0.354	0.006
	(0.284)	(0.215)	(0.615)	(0.672)
Realigner # 2020	0.807**	0.183	0.807	0.183
	(0.332)	(0.210)	(0.658)	(0.695)
Constant	-0.648***	-0.047	-0.648	-0.047
	(0.194)	(0.212)	(0.607)	(0.636)
Observations	1,358	1,552	1,358	1,552
Number of panel/groups	355	374	48	49

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

Unsurprisingly, the controls for incumbency and candidate quality[246] were substantively significant in all models, with women outperforming men in Democratic primaries only, likely due to gender differences in candidate ability and quality (see Anzia and Berry 2011; Fox and Lawless 2010).[247] The multilevel models show that higher campaign spending was positively associated with success in these contests. Realigner candidates also performed better in

[246] For all models, control variables are shown in the appendix only.
[247] The coefficients for these controls are shown in the chapter appendix.

Democratic Senate primaries than in House nominations and did particularly well in 2020, the significance of these controls aligns with the descriptive statistics shown in chapter four.

Table 11.19 Ideological Primaries: Candidate Level Analysis

DV = Primary Winner	xtlogit Democratic	xtlogit Republican	melogit Democratic	melogit Republican	xtlogit Democratic	xtlogit Republican	melogit Democratic	melogit Republican
Main IV								
CFscore 'Extreme' (Dichotomous)	-0.499	0.043	-0.499	0.043				
	(1.525)	(1.487)	(1.119)	(1.074)				
CFscore					0.537	0.905	0.537	0.905
					(0.702)	(0.822)	(0.797)	(0.876)
Additional Controls								
Incumbent	4.377***	4.477***	4.376***	4.477***	5.053***	5.003***	5.052***	5.003***
	(0.616)	(0.517)	(0.450)	(0.395)	(0.613)	(0.482)	(0.439)	(0.365)
Quality Candidate	0.993***	0.719***	0.993***	0.719***	0.904***	0.734***	0.904***	0.734***
	(0.246)	(0.198)	(0.252)	(0.183)	(0.244)	(0.188)	(0.236)	(0.172)
Female Candidate	0.553***	-0.440*	0.553***	-0.440*	0.550***	-0.401*	0.550***	-0.401*
	(0.200)	(0.226)	(0.190)	(0.225)	(0.178)	(0.220)	(0.175)	(0.206)
Primary Spending ($10,000s)	0.004	0.004	0.004	0.004*	0.004	0.003	0.004*	0.003
	(0.004)	(0.005)	(0.002)	(0.003)	(0.004)	(0.004)	(0.002)	(0.002)
Main IV # Relative PVI	0.046*	0.019	0.046**	0.019	0.012	-0.002	0.012	-0.002
	(0.028)	(0.026)	(0.022)	(0.019)	(0.015)	(0.016)	(0.017)	(0.017)
Main IV # Median Income ($10,000s)	0.025	0.159	0.025	0.159	-0.077	-0.019	-0.077	-0.019
	(0.173)	(0.140)	(0.120)	(0.106)	(0.078)	(0.088)	(0.088)	(0.094)
Main IV # White (%)	-0.227	-1.168	-0.227	-1.168	0.598	-0.397	0.598	-0.397
	(1.422)	(1.324)	(1.043)	(0.946)	(0.719)	(0.813)	(0.790)	(0.857)
Main IV # Senate	1.311	0.681	1.311*	0.681	-0.748	0.108	-0.748	0.108
	(0.862)	(0.567)	(0.679)	(0.423)	(0.460)	(0.541)	(0.460)	(0.558)
Main IV # Incumbent Primary	-0.879	0.038	-0.879	0.038	-0.512	0.130	-0.512	0.130
	(0.916)	(0.723)	(0.664)	(0.525)	(0.355)	(0.388)	(0.468)	(0.453)
Main IV # Open Primary	-2.177***	0.514	-2.177***	0.514	0.781**	0.227	0.781**	0.227
	(0.649)	(0.567)	(0.492)	(0.417)	(0.374)	(0.459)	(0.388)	(0.450)
Main IV # 2008	0.417	0.554	0.417	0.554	0.355	-0.197	0.355	-0.197
	(1.161)	(1.184)	(0.801)	(0.827)	(0.553)	(0.573)	(0.565)	(0.694)
Main IV # 2010	0.511	-1.261	0.511	-1.261*	0.019	-0.865*	0.019	-0.865
	(1.274)	(0.962)	(0.875)	(0.695)	(0.626)	(0.514)	(0.640)	(0.568)
Main IV # 2012	0.459	-1.376	0.459	-1.376*	-0.380	-1.466***	-0.380	-1.466**
	(1.137)	(1.035)	(0.744)	(0.727)	(0.487)	(0.516)	(0.514)	(0.631)
Main IV # 2014	0.777	-1.439	0.777	-1.439*	-0.356	-1.022*	-0.356	-1.022
	(1.090)	(1.053)	(0.794)	(0.755)	(0.536)	(0.549)	(0.560)	(0.646)
Main IV # 2016	0.131	-1.570	0.131	-1.570**	-0.288	-1.059**	-0.288	-1.059*
	(1.118)	(1.088)	(0.778)	(0.787)	(0.460)	(0.483)	(0.532)	(0.623)
Main IV # 2018	0.699	-0.289	0.699	-0.289	-0.227	-0.406	-0.227	-0.406
	(0.964)	(1.063)	(0.684)	(0.743)	(0.480)	(0.536)	(0.503)	(0.613)
Constant	-0.449	-0.155	-0.449	-0.155	0.013	-0.960	0.012	-0.960
	(0.792)	(0.755)	(0.797)	(0.762)	(0.801)	(0.979)	(1.027)	(1.122)
Observations	840	1,186	840	1,186	1,030	1,392	1,030	1,392
Number of panel / groups	277	325	47	49	337	374	47	49

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

The controls for incumbency and quality are strong predictors of success, and women perform better in Democratic primaries. Comparatively non-centrist candidates appear to perform particularly poorly in open Democratic primaries, potentially indicating greater influence of party elites in these contests to ensure an 'electable' nominee (Hassell 2018).

Table 11.20 Factional Primaries with Realigner Winner as DV: Contest Level Analysis

DV: Realigner Winner	xtlogit Democratic	xtlogit Republican	melogit Democratic	melogit Republican
District PVI	0.046***	0.042**	0.036***	0.028**
	(0.016)	(0.016)	(0.013)	(0.012)
District PVI # District PVI	0.002***	0.000	0.002***	0.000
	(0.001)	(0.001)	(0.000)	(0.000)
Gender Difference: Woman Beats Man	0.357	-0.360	0.337	-0.321
	(0.269)	(0.445)	(0.222)	(0.277)
Gender Difference: Man Beats Woman	-0.677**	-0.311	-0.660**	-0.227
	(0.307)	(0.358)	(0.277)	(0.259)
Quality Difference: Quality Beats Amateur	-1.485***	-0.657**	-1.256***	-0.559**
	(0.330)	(0.274)	(0.278)	(0.225)
Quality Difference: Amateur Beats Quality	0.853	1.031**	0.750*	0.904***
	(0.553)	(0.497)	(0.437)	(0.340)
Spending Difference	-0.016***	-0.027***	-0.015***	-0.023***
	(0.006)	(0.008)	(0.004)	(0.005)
Median Income ($10,000s)	-0.070	-0.115	-0.062	-0.054
	(0.087)	(0.083)	(0.066)	(0.068)
District White %	0.346	-1.246*	-0.013	-0.809
	(0.844)	(0.733)	(0.703)	(0.684)
Senate	1.162**	0.033	0.993***	0.139
	(0.477)	(0.376)	(0.369)	(0.271)
Incumbent Primary	-0.119	-0.865**	-0.077	-0.715**
	(0.432)	(0.392)	(0.352)	(0.292)
Open Primary	-0.627*	0.071	-0.541*	-0.088
	(0.369)	(0.349)	(0.314)	(0.272)
2008	0.318	-1.444**	0.309	-1.011**
	(0.521)	(0.651)	(0.462)	(0.485)
2010	0.538	-1.529***	0.377	-1.235***
	(0.527)	(0.559)	(0.476)	(0.420)
2012	0.681	-1.830***	0.507	-1.364***
	(0.541)	(0.598)	(0.431)	(0.432)
2014	0.078	-1.671***	0.123	-1.345***
	(0.542)	(0.568)	(0.455)	(0.455)
2016	0.337	-1.611***	0.283	-1.374***
	(0.490)	(0.599)	(0.423)	(0.456)
2018	-0.158	-1.029*	-0.184	-0.807*
	(0.474)	(0.581)	(0.398)	(0.422)
2020	-0.252	-0.869	-0.361	-0.840*
	(0.472)	(0.599)	(0.415)	(0.450)
Constant	-0.558	2.741***	-0.130	1.828***
	(0.823)	(0.896)	(0.656)	(0.705)
Observations	679	776	679	776
Number of panel (districts)	355	374		
Number of groups (states)			48	49

Robust standard errors in parentheses

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

Figure 11.27 Full Coefficients: Factional Primaries

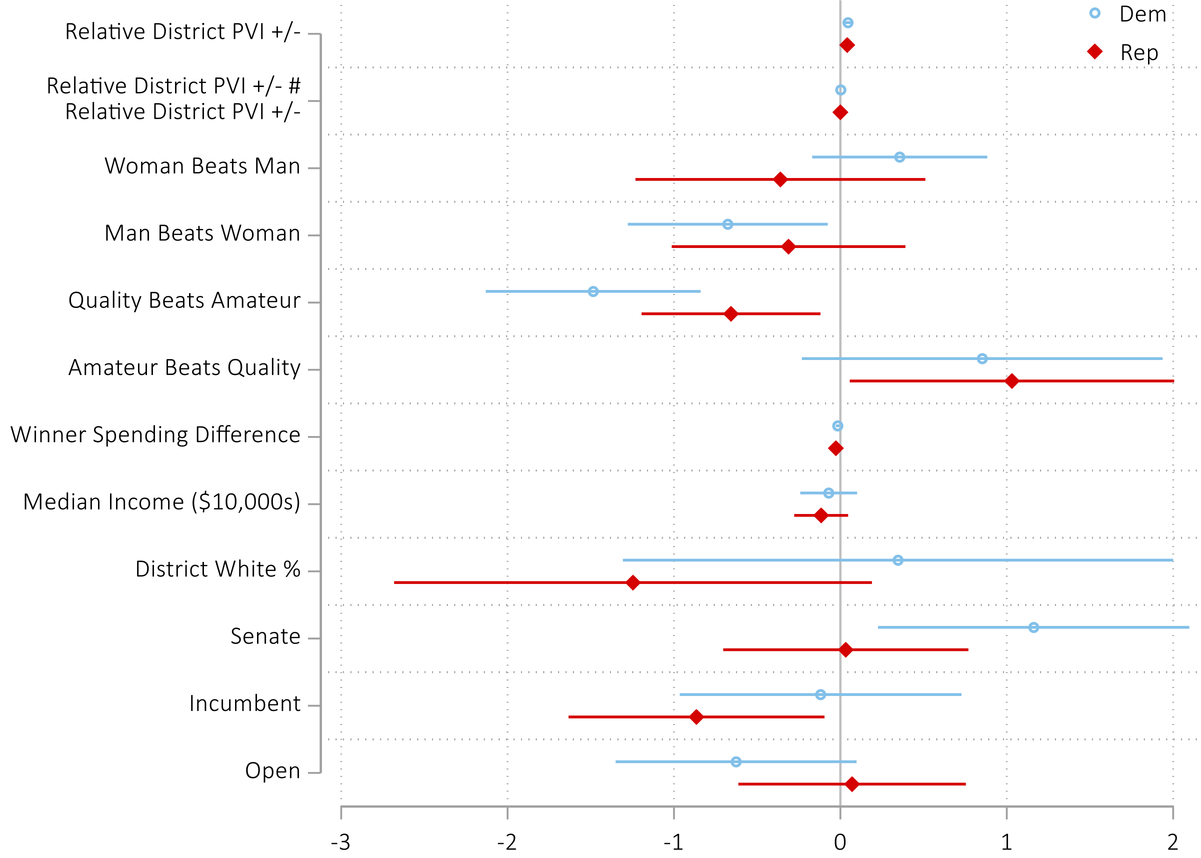


Figure 11.28 Full Coefficients: Ideological Primaries

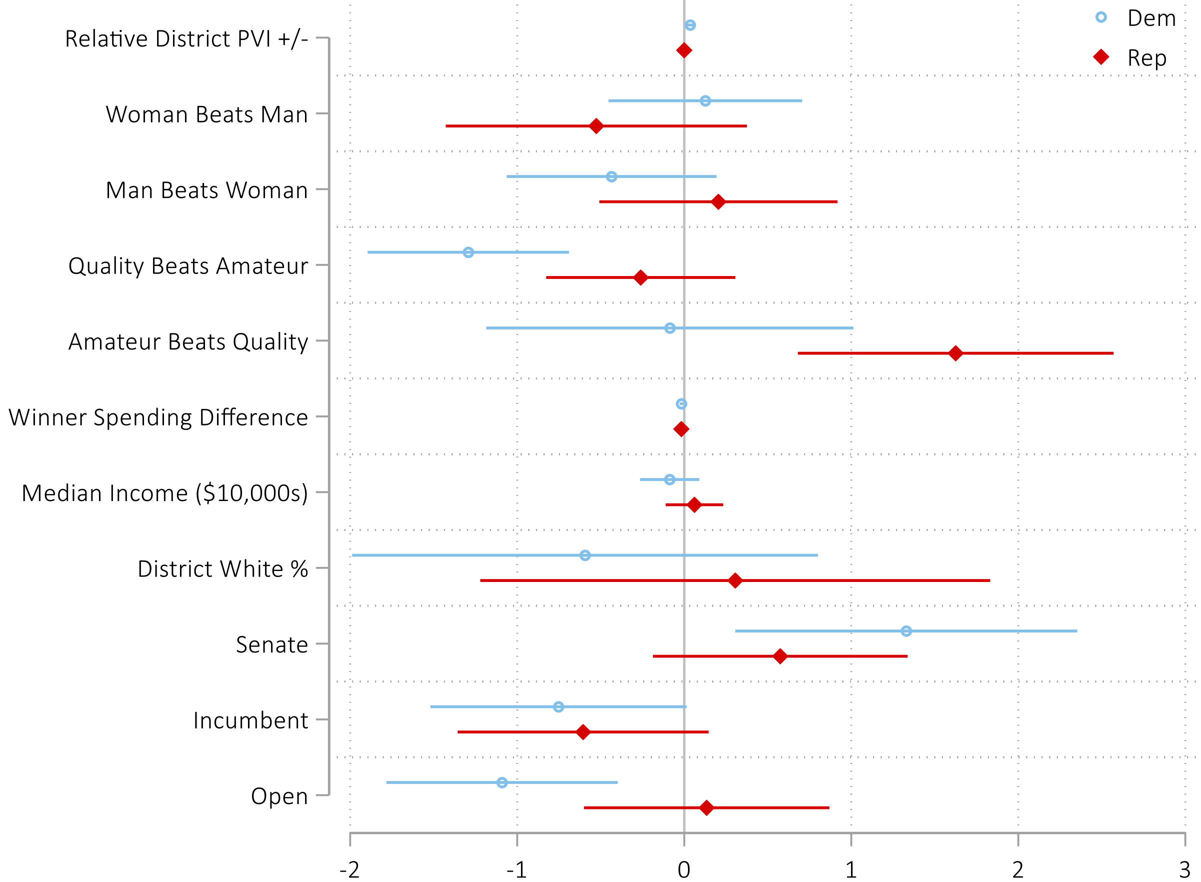


Table 11.21 Ideological Primaries with Extreme CFscore Winner as Dichotomous DV: Contest Level

DV: CFscore 'Extreme' Winner	xtlogit Democratic	xtlogit Republican	melogit Democratic	melogit Republican
Relative District PVI +/–	0.039***	0.005	0.038***	0.005
	(0.014)	(0.017)	(0.014)	(0.013)
Gender Difference: Woman Beats Man	0.088	-0.497	0.095	-0.325
	(0.299)	(0.477)	(0.268)	(0.342)
Gender Difference: Man Beats Woman	-0.441	0.184	-0.415	0.245
	(0.316)	(0.365)	(0.297)	(0.279)
Quality Difference: Quality Beats Amateur	-1.337***	-0.297	-1.302***	-0.152
	(0.315)	(0.305)	(0.292)	(0.236)
Quality Difference: Amateur Beats Quality	-0.040	1.791***	-0.024	1.284***
	(0.570)	(0.516)	(0.508)	(0.347)
Spending Difference	-0.017***	-0.019**	-0.016***	-0.016***
	(0.006)	(0.008)	(0.005)	(0.004)
Median Income ($10,000s)	-0.087	0.045	-0.082	0.002
	(0.094)	(0.095)	(0.076)	(0.071)
District White %	-0.589	0.234	-0.610	0.058
	(0.716)	(0.813)	(0.653)	(0.660)
Senate	1.484***	0.376	1.454***	0.367
	(0.543)	(0.415)	(0.472)	(0.298)
Incumbent Primary	-0.847**	-0.770*	-0.799**	-0.572*
	(0.393)	(0.396)	(0.375)	(0.310)
Open Primary	-1.173***	0.010	-1.119***	0.002
	(0.359)	(0.390)	(0.353)	(0.304)
2008	0.332	-1.071	0.339	-0.711
	(0.559)	(0.773)	(0.502)	(0.519)
2010	0.432	-2.027***	0.413	-1.542***
	(0.572)	(0.691)	(0.532)	(0.441)
2012	0.352	-1.997***	0.350	-1.633***
	(0.531)	(0.711)	(0.469)	(0.451)
2014	0.633	-1.586**	0.618	-1.260***
	(0.552)	(0.708)	(0.511)	(0.464)
2016	-0.199	-1.996***	-0.188	-1.596***
	(0.547)	(0.688)	(0.506)	(0.474)
2018	0.343	-0.827	0.344	-0.755*
	(0.478)	(0.749)	(0.447)	(0.457)
Constant	1.110	0.600	1.066	0.782
	(0.771)	(1.020)	(0.694)	(0.720)
Observations	420	593	420	593
Number of panel / groups	277	325	47	49

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

Several important differences between the parties can be observed in these models' other explanatory variables. Though candidates' gender differences did not align with 'extreme' candidates winning in either party, differences between the previous experience, or 'quality' of candidates had fundamental differences. In these models, the baseline category (not shown) is that both candidates are of the same quality, either quality or amateur candidates against each other. For the Democratic Party, an 'extreme' winner was far less likely when a quality candidate defeated an amateur than in the base category, but no more likely in contests where amateur candidates defeated a quality candidate. In Republican primaries, the reverse was true, with contests where quality candidates beat amateurs being statistically indistinguishable from the base category where both candidates had the same level of prior experience, but those

contests where amateurs beat quality candidates far more likely to align with the relatively extreme candidate becoming the nominee.

These patterns indicate the partisan asymmetry in the relationship between prior elected experience and candidate positioning. In the Democratic Party, amateur candidates with extreme support were particularly frequent against quality moderates, often incumbent members of Congress. Conversely, in the Republican Party amateurs who had success against quality candidates often had the support of highly conservative donors, but quality candidates who defeated amateurs were no more moderate than candidates who faced an opponent of the same quality.

As in factional primaries, candidates with comparatively extreme donor support were better able to win the nomination in Democratic Senate primaries than in the House. Greater differences in campaign spending also aligned with lower levels of success for the extreme candidate in both parties, likely because relative moderates, especially incumbents, remain better able to raise money, including through the formal party apparatus. In both parties, incumbent primaries aligned with the comparatively moderate candidate winning, this relationship was less substantive and with lower significance ($p<0.1$) in the Republican Party. Open primaries had larger partisan differences, with the comparatively extreme candidate particularly unlikely to win open Democratic contests. As with factional primaries, this partisan difference is likely connected to the greater ability of the formal apparatus of the Democratic Party to signal who the 'electable' candidates are in these important primaries, that the Democratic selectorate is more responsive to these signals, or that the party is simply more concerned with questions of 'electability' (see also Masket 2020).

Table 11.22 Incumbent Roll-Call and Donor Moderation & Likelihood of Any Primary Challenger

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-2.682***	-0.913*		
	(0.874)	(0.553)		
Incumbent CFscore Extremism (Relative)			-0.951***	-0.526
			(0.263)	(0.386)
Relative District PVI +/−	0.067***	0.051***	0.049***	0.045***
	(0.011)	(0.012)	(0.008)	(0.011)
Median Income ($10,000s)	-0.053	0.101	-0.021	0.076
	(0.048)	(0.065)	(0.054)	(0.066)
District White %	0.064	-0.045	0.371	-0.193
	(0.388)	(0.551)	(0.416)	(0.552)
Senate	1.434***	1.469***	1.520***	1.500***
	(0.307)	(0.305)	(0.319)	(0.323)
Election Year = 2008	0.017	0.632***	-0.015	0.624***
	(0.228)	(0.241)	(0.228)	(0.242)
Election Year = 2010	0.787***	1.454***	0.813***	1.441***
	(0.230)	(0.273)	(0.230)	(0.277)
Election Year = 2012	1.034***	1.622***	1.086***	1.645***
	(0.259)	(0.256)	(0.261)	(0.263)
Election Year = 2014	0.330	1.318***	0.365	1.379***
	(0.256)	(0.263)	(0.261)	(0.270)
Election Year = 2016	0.505*	1.525***	0.533*	1.569***
	(0.263)	(0.247)	(0.273)	(0.253)
Election Year = 2018	0.769***	1.424***	0.660**	1.551***
	(0.253)	(0.275)	(0.259)	(0.270)
Election Year = 2020	1.504***	0.941***		
	(0.256)	(0.277)		
Constant	-2.005***	-2.766***	-2.359***	-2.524***
	(0.394)	(0.615)	(0.464)	(0.618)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

Table 11.23 Incumbent Roll-Call and Donor Moderation & Likelihood of Ideological Primary Challenger

DV = 'Ideology – I' Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-7.509***	-4.682***		
	(1.194)	(0.720)		
Incumbent CFscore Extremism (Relative)			-1.213***	-1.983***
			(0.368)	(0.473)
Relative District PVI +/−	0.082***	0.075***	0.022*	0.053***
	(0.014)	(0.014)	(0.012)	(0.013)
Median Income ($10,000s)	0.056	0.154**	0.139**	0.055
	(0.051)	(0.076)	(0.065)	(0.072)
District White %	1.678***	-0.989	1.712***	-0.661
	(0.528)	(0.627)	(0.635)	(0.619)
Senate	1.108***	1.502***	0.875**	1.226***
	(0.297)	(0.332)	(0.355)	(0.342)
Election Year = 2008	0.230	0.537	0.124	0.492
	(0.317)	(0.409)	(0.318)	(0.394)
Election Year = 2010	0.099	2.053***	0.073	1.973***
	(0.342)	(0.393)	(0.347)	(0.381)
Election Year = 2012	-0.093	2.180***	-0.013	2.277***
	(0.371)	(0.405)	(0.382)	(0.396)
Election Year = 2014	-0.890**	1.530***	-0.841*	1.739***
	(0.434)	(0.398)	(0.447)	(0.396)
Election Year = 2016	-0.080	2.082***	0.035	2.252***
	(0.367)	(0.385)	(0.386)	(0.382)
Election Year = 2018	0.905***	1.880***	0.817**	2.147***
	(0.332)	(0.405)	(0.345)	(0.385)
Election Year = 2020	1.606***	1.111***		
	(0.331)	(0.421)		
Constant	-4.918***	-4.243***	-4.980***	-3.869***
	(0.486)	(0.803)	(0.654)	(0.748)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

Table 11.24 Incumbent Roll-Call and Donor Moderation & Quality Ideological Primary Challenger

DV = Quality Ideological Challenger	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-10.765**	-3.151*		
	(4.459)	(1.717)		
Incumbent CFscore Extremism (Relative)			-2.233*	-3.296***
			(1.215)	(1.127)
Relative District PVI +/−	0.053	0.002	-0.032	-0.013
	(0.052)	(0.030)	(0.039)	(0.032)
Median Income ($10,000s)	-0.462**	-0.012	-0.253	0.067
	(0.202)	(0.143)	(0.263)	(0.166)
District White %	-0.073	0.016	-1.682	0.763
	(1.789)	(1.301)	(1.810)	(1.398)
Senate	1.739**	1.601***	1.940**	1.797***
	(0.869)	(0.510)	(0.966)	(0.620)
Election Year = 2008	0.505	0.934	0.546	0.891
	(0.782)	(1.039)	(0.823)	(1.175)
Election Year = 2010	-0.159	0.104	-0.037	0.285
	(0.933)	(0.993)	(0.964)	(1.090)
Election Year = 2012	0.315	0.397	0.636	0.913
	(0.971)	(0.938)	(0.967)	(1.039)
Election Year = 2014	-0.752	0.487	-1.070	0.987
	(1.552)	(0.950)	(1.420)	(1.058)
Election Year = 2016	0.129	-0.180	-0.080	0.131
	(1.011)	(0.947)	(1.162)	(1.053)
Election Year = 2018	-0.789	-0.111	-1.211	1.029
	(1.062)	(1.024)	(1.245)	(1.063)
Election Year = 2020	-0.240	-0.243		
	(0.917)	(1.055)		
Constant	-0.705	-2.493	-0.096	-4.306**
	(1.743)	(1.657)	(1.859)	(1.890)
Observations	242	362	163	330
Number of districts	147	180	110	177

Robust standard errors in parentheses

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

Table 11.25 Incumbent Roll-Call and Donor Moderation & Competitiveness of Any Primary

DV = Fractionalization	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-0.151*	-0.064		
	(0.080)	(0.048)		
Incumbent CFscore Extremism (Relative)			-0.047*	-0.088***
			(0.024)	(0.030)
	-0.000	0.002**	-0.001	0.002***
Relative District PVI +/−	(0.001)	(0.001)	(0.001)	(0.001)
	0.003	-0.002	-0.004	-0.003
Median Income ($10,000s)	(0.004)	(0.005)	(0.005)	(0.005)
	-0.088**	-0.058	-0.038	-0.052
District White %	(0.042)	(0.053)	(0.043)	(0.052)
	-0.018	0.007	-0.003	-0.002
Senate	(0.025)	(0.018)	(0.026)	(0.020)
	0.025	-0.004	0.024	-0.008
Election Year = 2008	(0.028)	(0.025)	(0.029)	(0.025)
	0.010	0.010	0.009	0.004
Election Year = 2010	(0.023)	(0.025)	(0.023)	(0.025)
	-0.011	0.017	-0.007	0.017
Election Year = 2012	(0.026)	(0.024)	(0.027)	(0.024)
	-0.055**	0.036*	-0.045*	0.040*
Election Year = 2014	(0.026)	(0.022)	(0.027)	(0.022)
	-0.027	0.045**	-0.017	0.047**
Election Year = 2016	(0.030)	(0.022)	(0.030)	(0.022)
	-0.034	0.028	-0.033	0.036
Election Year = 2018	(0.025)	(0.023)	(0.027)	(0.023)
	0.083***	-0.008		
Election Year = 2020	(0.028)	(0.025)		
	0.388***	0.385***	0.384***	0.381***
Constant	(0.042)	(0.062)	(0.046)	(0.061)
	605	669	484	601
Observations	233	254	212	244
Number of districts	-0.151*	-0.064		

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.26 Incumbent Roll-Call and Donor Moderation & Competitiveness of Ideological Primary

DV = Fractionalization	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-0.490***	-0.019		
	(0.118)	(0.064)		
Incumbent CFscore Extremism (Relative)			-0.099**	-0.085**
			(0.041)	(0.039)
Relative District PVI +/−	0.003**	0.002**	-0.000	0.003***
	(0.001)	(0.001)	(0.001)	(0.001)
Median Income ($10,000s)	-0.000	-0.002	-0.007	0.001
	(0.006)	(0.006)	(0.007)	(0.005)
District White %	-0.061	-0.059	-0.004	-0.051
	(0.061)	(0.052)	(0.053)	(0.049)
Senate	-0.006	0.067***	0.012	0.072***
	(0.030)	(0.023)	(0.032)	(0.026)
Election Year = 2008	0.055	-0.045	0.056	-0.064
	(0.034)	(0.045)	(0.035)	(0.043)
Election Year = 2010	0.064**	0.018	0.074***	0.004
	(0.028)	(0.036)	(0.027)	(0.034)
Election Year = 2012	-0.017	-0.006	-0.011	-0.011
	(0.042)	(0.033)	(0.042)	(0.030)
Election Year = 2014	-0.093**	0.025	-0.092**	0.017
	(0.041)	(0.034)	(0.036)	(0.031)
Election Year = 2016	-0.042	0.027	-0.017	0.020
	(0.034)	(0.032)	(0.038)	(0.029)
Election Year = 2018	-0.008	0.020	-0.013	0.014
	(0.029)	(0.035)	(0.031)	(0.031)
Election Year = 2020	0.091***	-0.047		
	(0.029)	(0.035)		
Constant	0.327***	0.404***	0.357***	0.372***
	(0.054)	(0.065)	(0.054)	(0.059)
Observations	242	362	163	330
Number of districts	147	180	110	177

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.27 Relative Incumbent Position & Primary Defeat

DV = Incumbent Loss	Democratic	Republican	Democratic	Republican
Incumbent DW-N Ext	-6.124*	0.080		
	(3.582)	(2.252)		
Incumbent CFscore Ext			-1.898*	-1.699*
			(1.128)	(1.003)
Relative District PVI +/−	0.090***	-0.007	0.059***	0.031
	(0.034)	(0.035)	(0.023)	(0.025)
Median Income ($10,000s)	-0.115	-0.002	0.004	0.024
	(0.187)	(0.122)	(0.211)	(0.121)
District White %	0.704	0.887	1.285	1.038
	(1.215)	(1.007)	(1.251)	(0.941)
Senate	0.864	0.188	0.929	0.508
	(0.860)	(0.800)	(0.919)	(0.776)
Election Year = 2008	-0.660	1.268	-0.751	1.197
	(1.258)	(1.156)	(1.247)	(1.155)
Election Year = 2010	0.449	1.471	0.429	1.303
	(0.917)	(1.129)	(0.923)	(1.131)
Election Year = 2012	1.706**	2.022*	1.718**	2.020*
	(0.817)	(1.088)	(0.817)	(1.053)
Election Year = 2014	-0.684	1.154	-0.792	1.080
	(1.237)	(1.133)	(1.245)	(1.101)
Election Year = 2016	0.370	1.041	0.207	0.963
	(0.935)	(1.161)	(0.949)	(1.127)
Election Year = 2018	-0.035	0.986	-0.447	0.746
	(1.059)	(1.285)	(1.052)	(1.221)
Election Year = 2020	-0.145	1.590		
	(1.066)	(1.174)		
Constant	-5.744***	-6.013***	-6.772***	-6.844***
	(1.355)	(1.572)	(2.041)	(1.430)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

Table 11.28 Absolute Incumbent Position & Primary Defeat

DV = Incumbent Loss	Democratic	Republican	Democratic	Republican
Incumbent DW-N	5.884*	0.031		
	(3.553)	(2.275)		
Incumbent CFscore			1.641	-1.387
			(1.110)	(1.013)
Relative District PVI +/−	0.088***	-0.007	0.056**	0.028
	(0.034)	(0.035)	(0.022)	(0.025)
Median Income ($10,000s)	-0.115	-0.002	-0.012	0.033
	(0.186)	(0.122)	(0.210)	(0.121)
District White %	0.692	0.881	1.160	1.058
	(1.212)	(1.007)	(1.253)	(0.950)
Senate	0.455	0.191	0.897	0.494
	(0.772)	(0.779)	(0.932)	(0.781)
Election Year = 2008	-0.801	1.268	-0.733	1.273
	(1.238)	(1.155)	(1.251)	(1.144)
Election Year = 2010	0.321	1.469	0.420	1.454
	(0.906)	(1.139)	(0.927)	(1.120)
Election Year = 2012	1.776**	2.019*	1.860**	2.119**
	(0.825)	(1.065)	(0.825)	(1.040)
Election Year = 2014	-0.586	1.150	-0.501	1.177
	(1.223)	(1.123)	(1.226)	(1.087)
Election Year = 2016	0.494	1.038	0.575	1.083
	(0.928)	(1.142)	(0.929)	(1.099)
Election Year = 2018	-0.021	0.980	0.125	0.875
	(1.059)	(1.234)	(1.048)	(1.197)
Election Year = 2020	-0.100	1.586		
	(1.062)	(1.142)		
Constant	-3.506**	-6.026***	-5.032***	-5.522***
	(1.565)	(1.822)	(1.390)	(1.808)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

Table 11.29 Primary Contests & Nominee Donor Extremism

DV = Nominee CFscore Ext (Relative)	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Contested Primary	0.015	0.026**	-0.035	0.060	-0.035***	-0.013*	-0.045	0.002
	(0.016)	(0.012)	(0.033)	(0.039)	(0.012)	(0.007)	(0.051)	(0.056)
Relative District PVI +/−	-0.014***	-0.004***	-0.010**	-0.003	0.000	0.008***	-0.002	-0.000
	(0.001)	(0.001)	(0.005)	(0.002)	(0.003)	(0.003)	(0.003)	(0.003)
relative_pvi#relative_pvi	0.000***	-0.000	-0.000*	-0.000*	0.000	-0.000**	0.000	0.000
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.050***	-0.023**	0.043***	-0.045***	0.041***	-0.009	0.056***	-0.049***
	(0.008)	(0.010)	(0.014)	(0.013)	(0.009)	(0.009)	(0.016)	(0.015)
District White %	0.283***	-0.047	0.084	-0.107	0.289***	0.003	0.436***	0.066
	(0.073)	(0.084)	(0.116)	(0.103)	(0.074)	(0.129)	(0.136)	(0.117)
Senate	-0.046	-0.014	-0.160***	-0.050	0.165***	0.025	0.019	-0.011
	(0.041)	(0.030)	(0.056)	(0.049)	(0.044)	(0.034)	(0.060)	(0.035)
Election Year = 2008	0.003	-0.003	0.045	-0.002	0.006	-0.030***	-0.018	-0.022
	(0.016)	(0.020)	(0.038)	(0.054)	(0.010)	(0.007)	(0.069)	(0.063)
Election Year = 2010	-0.002	-0.011	0.024	-0.062	0.027**	-0.059***	-0.048	0.006
	(0.019)	(0.021)	(0.051)	(0.054)	(0.012)	(0.011)	(0.074)	(0.053)
Election Year = 2012	-0.010	-0.008	-0.050	-0.074	-0.008	0.003	-0.010	0.043
	(0.026)	(0.025)	(0.047)	(0.067)	(0.021)	(0.013)	(0.073)	(0.053)
Election Year = 2014	-0.069***	0.016	-0.027	-0.023	-0.107***	0.011	-0.143**	0.033
	(0.025)	(0.028)	(0.042)	(0.068)	(0.025)	(0.016)	(0.067)	(0.063)
Election Year = 2016	-0.063**	0.023	0.011	0.034	-0.165***	0.003	-0.199**	0.021
	(0.030)	(0.029)	(0.054)	(0.078)	(0.027)	(0.017)	(0.094)	(0.073)
Election Year = 2018	-0.093***	0.029	0.076*	-0.013	-0.244***	0.019	-0.091	0.037
	(0.027)	(0.029)	(0.043)	(0.079)	(0.026)	(0.018)	(0.071)	(0.070)
Constant	-0.476***	0.159*	-0.084	0.438***	-0.575***	-0.078	-0.519***	0.224*
	(0.072)	(0.090)	(0.131)	(0.123)	(0.074)	(0.113)	(0.160)	(0.122)
Observations	2,968	2,770	1,220	1,036	1,443	1,438	303	296
Number of districts	496	496	340	341	338	337	246	244

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

Table 11.30 Primary Contests & Roll-Call Position

DV = Nominee CFscore Ext (Relative)	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Factional Primary	0.019	-0.011	0.025	0.031	0.010	-0.034***	0.060	0.060**
	(0.026)	(0.021)	(0.045)	(0.044)	(0.022)	(0.013)	(0.058)	(0.027)
Relative District PVI +/−	-0.012***	-0.006***	-0.006*	-0.007***	0.009**	0.011***	-0.001	-0.001
	(0.002)	(0.001)	(0.004)	(0.003)	(0.003)	(0.004)	(0.004)	(0.001)
relative_pvi#relative_pvi	0.000***	0.000*	0.000	-0.000	-0.000	-0.000*	0.000	0.000***
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.057***	-0.053***	0.057***	-0.083***	0.042***	-0.024**	0.058***	-0.045***
	(0.011)	(0.009)	(0.021)	(0.017)	(0.012)	(0.012)	(0.019)	(0.014)
District White %	0.333***	-0.045	0.282*	-0.118	0.368***	0.058	0.418***	0.075
	(0.082)	(0.083)	(0.150)	(0.153)	(0.099)	(0.082)	(0.148)	(0.104)
Senate	-0.047	-0.031	-0.130**	-0.052	0.212***	-0.047	0.030	-0.020
	(0.046)	(0.035)	(0.061)	(0.057)	(0.060)	(0.039)	(0.073)	(0.034)
Election Year = 2008	-0.024	-0.058	-0.022	-0.070	0.022	-0.078***	0.092	-0.047
	(0.036)	(0.050)	(0.054)	(0.118)	(0.051)	(0.026)	(0.104)	(0.061)
Election Year = 2010	-0.056*	-0.056	0.011	-0.139	-0.022	-0.080***	0.084	-0.024
	(0.033)	(0.052)	(0.078)	(0.120)	(0.042)	(0.029)	(0.089)	(0.050)
Election Year = 2012	-0.030	-0.067	-0.067	-0.191	-0.019	-0.041	0.094	0.048
	(0.034)	(0.058)	(0.058)	(0.139)	(0.043)	(0.026)	(0.099)	(0.055)
Election Year = 2014	-0.130***	-0.015	-0.135**	-0.112	-0.088*	-0.020	-0.125	0.056
	(0.038)	(0.058)	(0.066)	(0.137)	(0.047)	(0.028)	(0.095)	(0.060)
Election Year = 2016	-0.105**	-0.001	-0.041	0.027	-0.175***	-0.031	-0.047	0.025
	(0.042)	(0.052)	(0.076)	(0.136)	(0.047)	(0.029)	(0.098)	(0.066)
Election Year = 2018	-0.088**	0.008	0.044	-0.069	-0.267***	-0.024	-0.006	0.054
	(0.035)	(0.051)	(0.055)	(0.125)	(0.045)	(0.031)	(0.087)	(0.060)
Constant	-0.511***	0.396***	-0.329*	0.770***	-0.730***	0.018	-0.678***	0.150
	(0.088)	(0.108)	(0.182)	(0.243)	(0.100)	(0.100)	(0.155)	(0.107)
Observations	1,236	1,360	557	525	459	582	220	253
Number of districts	459	453	275	275	208	241	188	213

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

Table 11.31 Factional Primaries & Nominee Donor Extremism

DV = Nominee CFscore Ext (Relative)	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Factional Primary	0.019	-0.011	0.025	0.031	0.010	-0.034***	0.060	0.060**
	(0.026)	(0.021)	(0.045)	(0.044)	(0.022)	(0.013)	(0.058)	(0.027)
Relative District PVI +/−	-0.012***	-0.006***	-0.006*	-0.007***	0.009**	0.011***	-0.001	-0.001
	(0.002)	(0.001)	(0.004)	(0.003)	(0.003)	(0.004)	(0.004)	(0.001)
relative_pvi#relative_pvi	0.000***	0.000*	0.000	-0.000	-0.000	-0.000*	0.000	0.000***
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.057***	-0.053***	0.057***	-0.083***	0.042***	-0.024**	0.058***	-0.045***
	(0.011)	(0.009)	(0.021)	(0.017)	(0.012)	(0.012)	(0.019)	(0.014)
District White %	0.333***	-0.045	0.282*	-0.118	0.368***	0.058	0.418***	0.075
	(0.082)	(0.083)	(0.150)	(0.153)	(0.099)	(0.082)	(0.148)	(0.104)
Senate	-0.047	-0.031	-0.130**	-0.052	0.212***	-0.047	0.030	-0.020
	(0.046)	(0.035)	(0.061)	(0.057)	(0.060)	(0.039)	(0.073)	(0.034)
Election Year = 2008	-0.024	-0.058	-0.022	-0.070	0.022	-0.078***	0.092	-0.047
	(0.036)	(0.050)	(0.054)	(0.118)	(0.051)	(0.026)	(0.104)	(0.061)
Election Year = 2010	-0.056*	-0.056	0.011	-0.139	-0.022	-0.080***	0.084	-0.024
	(0.033)	(0.052)	(0.078)	(0.120)	(0.042)	(0.029)	(0.089)	(0.050)
Election Year = 2012	-0.030	-0.067	-0.067	-0.191	-0.019	-0.041	0.094	0.048
	(0.034)	(0.058)	(0.058)	(0.139)	(0.043)	(0.026)	(0.099)	(0.055)
Election Year = 2014	-0.130***	-0.015	-0.135**	-0.112	-0.088*	-0.020	-0.125	0.056
	(0.038)	(0.058)	(0.066)	(0.137)	(0.047)	(0.028)	(0.095)	(0.060)
Election Year = 2016	-0.105**	-0.001	-0.041	0.027	-0.175***	-0.031	-0.047	0.025
	(0.042)	(0.052)	(0.076)	(0.136)	(0.047)	(0.029)	(0.098)	(0.066)
Election Year = 2018	-0.088**	0.008	0.044	-0.069	-0.267***	-0.024	-0.006	0.054
	(0.035)	(0.051)	(0.055)	(0.125)	(0.045)	(0.031)	(0.087)	(0.060)
Constant	-0.511***	0.396***	-0.329*	0.770***	-0.730***	0.018	-0.678***	0.150
	(0.088)	(0.108)	(0.182)	(0.243)	(0.100)	(0.100)	(0.155)	(0.107)
Observations	1,236	1,360	557	525	459	582	220	253
Number of districts	459	453	275	275	208	241	188	213

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

Table 11.32 Ideological Primaries & Nominee Donor Extremism

DV = Nominee CFscore Ext (Relative)	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Ideological Primary	-0.003	-0.002	0.018	0.032	-0.007	-0.018	0.081	0.036
	(0.025)	(0.022)	(0.044)	(0.043)	(0.022)	(0.014)	(0.055)	(0.028)
Relative District PVI +/−	-0.013***	-0.006***	-0.006	-0.007***	0.008**	0.012***	-0.000	-0.001
	(0.002)	(0.001)	(0.004)	(0.002)	(0.003)	(0.004)	(0.004)	(0.001)
relative_pvi#relative_pvi	0.000***	0.000*	0.000	-0.000	-0.000	-0.000**	0.000	0.000***
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.057***	-0.052***	0.056***	-0.081***	0.041***	-0.020*	0.057***	-0.044***
	(0.011)	(0.009)	(0.020)	(0.017)	(0.012)	(0.012)	(0.019)	(0.014)
District White %	0.302***	-0.055	0.261*	-0.126	0.350***	0.040	0.455***	0.065
	(0.084)	(0.081)	(0.150)	(0.151)	(0.098)	(0.082)	(0.148)	(0.104)
Senate	-0.036	-0.034	-0.133**	-0.050	0.221***	-0.048	0.071	-0.013
	(0.048)	(0.034)	(0.061)	(0.055)	(0.060)	(0.038)	(0.078)	(0.033)
Election Year = 2008	-0.008	-0.049	0.010	-0.047	0.027	-0.066***	0.047	-0.051
	(0.035)	(0.047)	(0.052)	(0.110)	(0.043)	(0.023)	(0.103)	(0.062)
Election Year = 2010	-0.041	-0.048	0.040	-0.136	-0.003	-0.073***	0.025	-0.019
	(0.031)	(0.049)	(0.074)	(0.113)	(0.036)	(0.027)	(0.091)	(0.051)
Election Year = 2012	-0.022	-0.063	-0.048	-0.184	-0.014	-0.039	0.050	0.041
	(0.033)	(0.057)	(0.056)	(0.133)	(0.041)	(0.025)	(0.098)	(0.056)
Election Year = 2014	-0.117***	-0.007	-0.114*	-0.111	-0.074	-0.014	-0.166*	0.050
	(0.038)	(0.055)	(0.063)	(0.134)	(0.046)	(0.028)	(0.095)	(0.059)
Election Year = 2016	-0.098**	0.007	-0.025	0.031	-0.166***	-0.025	-0.091	0.016
	(0.041)	(0.050)	(0.072)	(0.132)	(0.044)	(0.028)	(0.098)	(0.067)
Election Year = 2018	-0.072**	0.014	0.069	-0.064	-0.257***	-0.023	-0.059	0.058
	(0.035)	(0.049)	(0.054)	(0.119)	(0.044)	(0.029)	(0.086)	(0.060)
Constant	-0.495***	0.389***	-0.321*	0.754***	-0.712***	-0.009	-0.675***	0.168
	(0.088)	(0.104)	(0.179)	(0.232)	(0.102)	(0.099)	(0.152)	(0.109)
Observations	1,282	1,395	575	540	484	601	223	254
Number of districts	459	454	278	277	212	244	190	214

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

Table 11.33 Factional Primaries & Roll-Call Position

DV = Nominee DW-N Ext (Relative)	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Factional Primary	-0.008	-0.046***	0.029	-0.065**	-0.012**	-0.040***	-0.031	-0.022
	(0.006)	(0.008)	(0.020)	(0.032)	(0.006)	(0.009)	(0.023)	(0.022)
Relative District PVI +/−	0.009***	0.011***	0.009***	0.006	0.009***	0.013***	0.009***	0.015***
	(0.001)	(0.002)	(0.002)	(0.004)	(0.001)	(0.002)	(0.002)	(0.002)
relative_pvi#relative_pvi	-0.000*	-0.000**	-0.000	0.000	-0.000***	-0.000**	-0.000	-0.000*
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.003	-0.005	0.002	-0.029**	-0.000	0.001	0.006	-0.005
	(0.003)	(0.005)	(0.008)	(0.014)	(0.003)	(0.006)	(0.007)	(0.007)
District White %	0.009	-0.038	-0.024	0.050	0.038	-0.072*	-0.018	-0.051
	(0.023)	(0.039)	(0.061)	(0.095)	(0.028)	(0.043)	(0.060)	(0.084)
Senate	0.061***	0.053***	0.096***	0.104**	0.051***	0.016	0.102***	0.066**
	(0.013)	(0.018)	(0.027)	(0.050)	(0.014)	(0.021)	(0.037)	(0.030)
Election Year = 2008	0.006	-0.021	-0.014	0.156*	0.015	-0.028	-0.012	0.007
	(0.012)	(0.017)	(0.034)	(0.094)	(0.013)	(0.019)	(0.035)	(0.046)
Election Year = 2010	0.023**	-0.013	-0.005	0.100	0.018	-0.035*	0.001	0.033
	(0.010)	(0.015)	(0.038)	(0.080)	(0.013)	(0.020)	(0.031)	(0.038)
Election Year = 2012	-0.008	-0.047***	-0.029	0.070	-0.007	-0.059***	-0.021	0.008
	(0.011)	(0.015)	(0.031)	(0.072)	(0.013)	(0.017)	(0.037)	(0.040)
Election Year = 2014	-0.018	-0.048***	-0.116**	0.011	-0.015	-0.050**	-0.024	-0.011
	(0.011)	(0.016)	(0.057)	(0.093)	(0.013)	(0.020)	(0.032)	(0.037)
Election Year = 2016	-0.035***	-0.047***	-0.053	0.178**	-0.036**	-0.043**	-0.016	-0.055
	(0.013)	(0.015)	(0.033)	(0.083)	(0.014)	(0.019)	(0.037)	(0.037)
Election Year = 2018	-0.016	-0.062***	0.021	0.002	-0.021	-0.068***	-0.002	-0.078**
	(0.012)	(0.017)	(0.038)	(0.085)	(0.013)	(0.020)	(0.035)	(0.038)
Election Year = 2020	-0.020*	-0.052***	0.019	0.109	-0.026*	-0.078***	0.056	-0.023
	(0.012)	(0.018)	(0.099)	(0.081)	(0.015)	(0.022)	(0.043)	(0.041)
Constant	-0.105***	0.030	-0.107	-0.003	-0.101***	0.018	-0.090*	-0.014
	(0.023)	(0.046)	(0.069)	(0.137)	(0.025)	(0.054)	(0.052)	(0.085)
Observations	802	962	95	116	576	645	131	201
Number of districts	309	320	88	102	228	248	115	167

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

Table 11.34 Ideological Primaries & Roll-Call Voting

DV = Nominee DW-N Ext (Relative)	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Ideological Primary	-0.003	-0.021***	0.040**	-0.025	-0.007	-0.020**	-0.025	-0.002
	(0.006)	(0.007)	(0.019)	(0.057)	(0.006)	(0.009)	(0.023)	(0.021)
Relative District PVI +/−	0.008***	0.011***	0.009***	0.009	0.009***	0.012***	0.009***	0.015***
	(0.001)	(0.002)	(0.002)	(0.016)	(0.001)	(0.002)	(0.002)	(0.002)
relative_pvi#relative_pvi	-0.000*	-0.000**	-0.000	0.002	-0.000***	-0.000**	-0.000	-0.000*
	(0.000)	(0.000)	(0.000)	(0.001)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.003	-0.004	0.002	-0.278***	0.001	0.002	0.005	-0.005
	(0.003)	(0.005)	(0.008)	(0.089)	(0.003)	(0.006)	(0.007)	(0.007)
District White %	0.002	-0.043	-0.026	0.520	0.025	-0.080*	-0.006	-0.058
	(0.025)	(0.041)	(0.060)	(0.318)	(0.030)	(0.044)	(0.057)	(0.085)
Senate	0.065***	0.048**	0.096***	0.040	0.055***	0.007	0.108***	0.064**
	(0.013)	(0.019)	(0.027)	(0.092)	(0.014)	(0.022)	(0.036)	(0.029)
Election Year = 2008	0.012	-0.021	-0.005	0.030	0.021**	-0.027	-0.011	0.005
	(0.010)	(0.015)	(0.032)	(0.112)	(0.010)	(0.017)	(0.035)	(0.045)
Election Year = 2010	0.021**	-0.016	-0.005	0.054	0.018*	-0.034*	-0.001	0.029
	(0.010)	(0.014)	(0.035)	(0.065)	(0.011)	(0.018)	(0.032)	(0.038)
Election Year = 2012	-0.006	-0.049***	-0.024	-0.000	-0.003	-0.057***	-0.020	0.006
	(0.011)	(0.014)	(0.030)	(0.068)	(0.012)	(0.016)	(0.036)	(0.041)
Election Year = 2014	-0.014	-0.049***	-0.104*	0.076	-0.010	-0.051***	-0.024	-0.010
	(0.011)	(0.015)	(0.056)	(0.103)	(0.012)	(0.018)	(0.032)	(0.037)
Election Year = 2016	-0.035***	-0.048***	-0.048	0.242***	-0.033**	-0.041**	-0.019	-0.055
	(0.013)	(0.014)	(0.031)	(0.088)	(0.013)	(0.018)	(0.037)	(0.037)
Election Year = 2018	-0.016	-0.069***	0.025	0.112	-0.018	-0.074***	-0.002	-0.081**
	(0.012)	(0.016)	(0.035)	(0.085)	(0.012)	(0.019)	(0.037)	(0.038)
Election Year = 2020	-0.019	-0.051***	0.031	0.355***	-0.021	-0.078***	0.055	-0.024
	(0.012)	(0.017)	(0.098)	(0.113)	(0.014)	(0.020)	(0.043)	(0.042)
Constant	-0.108***	0.020	-0.119*	0.902*	-0.105***	0.010	-0.098**	-0.012
	(0.023)	(0.048)	(0.066)	(0.469)	(0.026)	(0.056)	(0.050)	(0.085)
Observations	833	986	97	117	604	666	132	203
Number of districts	313	321	90	103	231	253	116	168

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

Table 11.35 Winner Realigner & Primary Turnout

DV = Winner Realigner `xtlogit` models	Democratic All	Republican All	Democratic Factional	Republican Factional
Primary Turnout %	-2.251	1.595	0.508	2.126
	(1.835)	(2.283)	(2.533)	(3.236)
Relative District PVI +/−	0.061***	0.072***	0.028*	0.030*
	(0.012)	(0.012)	(0.016)	(0.016)
c.relative_pvi#c.relative_pvi	0.004***	0.002***	0.003***	0.000
	(0.000)	(0.000)	(0.001)	(0.001)
Median Income ($10,000s)	-0.034	-0.101	-0.060	-0.108
	(0.069)	(0.070)	(0.083)	(0.086)
District White %	0.852	-1.196**	0.290	-1.146
	(0.646)	(0.606)	(0.835)	(0.781)
Senate	0.183	-0.471	0.212	-0.468
	(0.360)	(0.340)	(0.424)	(0.370)
Incumbent Primary	-0.527*	-1.085***	-1.053***	-1.520***
	(0.288)	(0.230)	(0.400)	(0.353)
Open Primary	-0.583**	-0.240	-0.851**	0.044
	(0.240)	(0.223)	(0.370)	(0.333)
Election Year = 2008	0.050	0.020	-0.016	-0.977*
	(0.348)	(0.341)	(0.530)	(0.584)
Election Year = 2010	0.376	0.312	0.509	-1.120**
	(0.350)	(0.299)	(0.559)	(0.504)
Election Year = 2012	0.270	-0.165	0.761	-1.444***
	(0.320)	(0.310)	(0.502)	(0.522)
Election Year = 2014	-0.053	0.175	-0.109	-1.363**
	(0.357)	(0.323)	(0.534)	(0.548)
Election Year = 2016	0.574*	0.149	0.396	-1.254**
	(0.338)	(0.323)	(0.486)	(0.548)
Election Year = 2018	0.413	0.231	-0.350	-0.717
	(0.315)	(0.317)	(0.457)	(0.504)
Election Year = 2020	0.576*	0.544*	-0.452	-0.686
	(0.340)	(0.322)	(0.494)	(0.536)
Constant	-2.138***	0.690	-0.892	1.943**
	(0.639)	(0.623)	(0.815)	(0.860)
Observations	1,606	1,724	679	776
Number of districts	470	470	355	374

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.36 Winner Realigner & Primary Turnout: Multilevel Model

DV = Winner Realigner `melogit` models	Democratic All	Republican All	Democratic Factional	Republican Factional
Primary Turnout %	-0.897	2.374	1.168	2.371
	(1.396)	(1.886)	(2.142)	(2.660)
Relative District PVI +/−	0.044***	0.043***	0.017	0.019
	(0.009)	(0.009)	(0.013)	(0.013)
c.relative_pvi#c.relative_pvi	0.002***	0.001***	0.002***	0.000
	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	-0.052	0.013	-0.053	-0.059
	(0.046)	(0.049)	(0.064)	(0.065)
District White %	0.694	-0.173	-0.378	-0.794
	(0.470)	(0.518)	(0.709)	(0.656)
Senate	0.117	-0.332*	0.117	-0.337
	(0.203)	(0.182)	(0.310)	(0.237)
Incumbent Primary	-0.265	-1.047***	-0.858***	-1.302***
	(0.208)	(0.175)	(0.312)	(0.261)
Open Primary	-0.406**	-0.318*	-0.737**	-0.127
	(0.193)	(0.176)	(0.301)	(0.255)
Election Year = 2008	0.055	0.006	0.031	-0.675
	(0.285)	(0.279)	(0.440)	(0.460)
Election Year = 2010	0.312	0.072	0.396	-0.991**
	(0.280)	(0.246)	(0.452)	(0.396)
Election Year = 2012	0.254	-0.186	0.534	-1.133***
	(0.262)	(0.254)	(0.408)	(0.405)
Election Year = 2014	0.163	-0.105	0.011	-1.145***
	(0.283)	(0.263)	(0.434)	(0.430)
Election Year = 2016	0.462*	-0.104	0.371	-1.100**
	(0.272)	(0.263)	(0.399)	(0.430)
Election Year = 2018	0.346	0.043	-0.327	-0.641
	(0.254)	(0.259)	(0.373)	(0.397)
Election Year = 2020	0.410	0.111	-0.534	-0.754*
	(0.269)	(0.261)	(0.403)	(0.423)
Constant	-1.595***	-0.460	-0.225	1.345**
	(0.450)	(0.494)	(0.640)	(0.675)
Observations	1,606	1,724	679	776
Number of groups	49	49	48	49

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.37 Within CFscore Extreme & Primary Turnout

DV = CFscore Extreme (0/1) xtlogit	Democratic All	Republican All	Democratic Ideological	Republican Ideological
Primary Turnout %	0.071	-0.136	1.213	4.032
	(1.652)	(2.243)	(2.408)	(3.449)
Relative District PVI +/–	0.008	-0.021*	0.021	-0.001
	(0.010)	(0.011)	(0.015)	(0.018)
c.relative_pvi#c.relative_pvi	-0.000	-0.000	0.000	-0.000
	(0.000)	(0.000)	(0.001)	(0.001)
Median Income ($10,000s)	-0.055	-0.007	-0.099	0.019
	(0.053)	(0.061)	(0.080)	(0.095)
District White %	-0.377	0.230	-1.030	-0.081
	(0.457)	(0.527)	(0.685)	(0.868)
Senate	0.130	-0.160	0.545	-0.113
	(0.273)	(0.267)	(0.413)	(0.395)
Incumbent Primary	-0.946***	-0.632***	-1.295***	-1.262***
	(0.255)	(0.234)	(0.394)	(0.388)
Open Primary	-0.679***	0.448**	-1.306***	0.122
	(0.215)	(0.225)	(0.381)	(0.376)
Election Year = 2008	-0.114	0.123	0.101	-0.671
	(0.297)	(0.359)	(0.498)	(0.644)
Election Year = 2010	0.276	-0.609*	0.425	-1.651***
	(0.301)	(0.312)	(0.524)	(0.549)
Election Year = 2012	0.205	-0.546*	0.487	-1.559***
	(0.279)	(0.322)	(0.472)	(0.544)
Election Year = 2014	-0.057	-0.554*	0.688	-1.271**
	(0.316)	(0.332)	(0.517)	(0.563)
Election Year = 2016	0.129	-0.366	0.100	-1.564***
	(0.307)	(0.344)	(0.500)	(0.582)
Election Year = 2018	0.163	-0.023	0.362	-0.547
	(0.269)	(0.343)	(0.449)	(0.547)
Constant	0.730	0.061	0.906	0.430
	(0.489)	(0.583)	(0.737)	(0.984)
Observations	852	997	420	593
Number of districts	409	420	277	325

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.38 Within CFscore Extreme & Primary Turnout: Multilevel Model

DV = CFscore Extreme (0/1) melogit	Democratic All	Republican All	Democratic Ideological	Republican Ideological
Primary Turnout %	0.047	-0.112	1.000	2.374
	(1.518)	(1.892)	(2.219)	(2.610)
Relative District PVI +/−	0.009	-0.018*	0.020	0.002
	(0.009)	(0.009)	(0.014)	(0.014)
c.relative_pvi#c.relative_pvi	-0.000	-0.000	0.000	-0.000
	(0.000)	(0.000)	(0.000)	(0.001)
Median Income ($10,000s)	-0.057	-0.018	-0.095	-0.013
	(0.049)	(0.050)	(0.074)	(0.069)
District White %	-0.379	0.095	-1.058*	-0.126
	(0.414)	(0.438)	(0.628)	(0.660)
Senate	0.114	-0.118	0.546	-0.077
	(0.247)	(0.206)	(0.379)	(0.267)
Incumbent Primary	-0.899***	-0.551***	-1.211***	-0.938***
	(0.236)	(0.200)	(0.353)	(0.283)
Open Primary	-0.615***	0.376*	-1.215***	0.083
	(0.198)	(0.194)	(0.339)	(0.289)
Election Year = 2008	-0.099	0.097	0.116	-0.384
	(0.281)	(0.319)	(0.470)	(0.493)
Election Year = 2010	0.264	-0.562**	0.388	-1.292***
	(0.286)	(0.275)	(0.493)	(0.415)
Election Year = 2012	0.209	-0.548*	0.460	-1.335***
	(0.265)	(0.285)	(0.445)	(0.424)
Election Year = 2014	-0.030	-0.530*	0.653	-1.057**
	(0.299)	(0.294)	(0.484)	(0.436)
Election Year = 2016	0.121	-0.387	0.104	-1.258***
	(0.291)	(0.303)	(0.471)	(0.448)
Election Year = 2018	0.163	-0.127	0.362	-0.541
	(0.255)	(0.303)	(0.423)	(0.429)
Constant	0.722	0.253	0.911	0.696
	(0.450)	(0.479)	(0.685)	(0.731)
Observations	852	997	420	593
Number of groups	48	49	47	49

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.39 Between CFscore Extreme & Primary Turnout

DV = CFscore vs median `xtreg`	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	-0.113	0.272	0.284	0.124	0.204	0.002
	(0.240)	(0.265)	(0.446)	(0.388)	(0.402)	(0.298)
Relative District PVI +/−	-0.004***	-0.002	-0.006**	0.002	-0.006**	-0.001
	(0.002)	(0.001)	(0.003)	(0.002)	(0.003)	(0.002)
c.relative_pvi#c.relative_pvi	0.000***	0.000**	0.000*	0.000	0.000*	0.000
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.051***	-0.048***	0.045***	-0.051***	0.053***	-0.050***
	(0.009)	(0.008)	(0.015)	(0.013)	(0.014)	(0.012)
District White %	0.312***	-0.064	0.178	-0.156	0.162	-0.083
	(0.084)	(0.071)	(0.141)	(0.105)	(0.128)	(0.098)
Senate	-0.013	-0.043	-0.016	-0.074	0.004	-0.071
	(0.051)	(0.039)	(0.076)	(0.051)	(0.071)	(0.053)
Incumbent Primary	-0.339***	-0.207***	-0.334***	-0.304***	-0.330***	-0.228***
	(0.036)	(0.026)	(0.063)	(0.042)	(0.059)	(0.033)
Open Primary	-0.181***	-0.116***	-0.147**	-0.138***	-0.133**	-0.086**
	(0.030)	(0.027)	(0.057)	(0.042)	(0.055)	(0.033)
Election Year = 2008	0.015	-0.055	0.074	-0.172***	0.067	-0.143***
	(0.039)	(0.037)	(0.080)	(0.065)	(0.073)	(0.051)
Election Year = 2010	0.021	-0.084**	-0.011	-0.214***	-0.039	-0.145***
	(0.040)	(0.033)	(0.082)	(0.057)	(0.076)	(0.044)
Election Year = 2012	-0.006	-0.072**	0.079	-0.183***	0.064	-0.115***
	(0.037)	(0.034)	(0.076)	(0.057)	(0.070)	(0.044)
Election Year = 2014	-0.098**	-0.017	-0.030	-0.132**	-0.031	-0.063
	(0.041)	(0.035)	(0.081)	(0.060)	(0.075)	(0.047)
Election Year = 2016	-0.093**	0.007	-0.022	-0.094	-0.042	-0.050
	(0.040)	(0.035)	(0.074)	(0.060)	(0.069)	(0.046)
Election Year = 2018	-0.045	0.001	-0.040	-0.064	-0.039	-0.035
	(0.037)	(0.036)	(0.069)	(0.058)	(0.064)	(0.046)
Constant	-0.326***	0.453***	-0.253*	0.701***	-0.283**	0.561***
	(0.083)	(0.075)	(0.136)	(0.117)	(0.126)	(0.106)
Observations	1,282	1,395	526	633	598	780
Number of districts	459	454	311	334	333	368

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.40 Between CFscore Extreme & Primary Turnout: Multilevel Model

DV = CFscore vs median mixed	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	-0.379	-0.379	-0.030	0.273	-0.133	0.144
	(0.256)	(0.256)	(0.477)	(0.441)	(0.436)	(0.374)
Relative District PVI +/−	-0.004**	-0.004**	-0.007**	0.000	-0.006**	-0.002
	(0.002)	(0.002)	(0.003)	(0.002)	(0.003)	(0.002)
c.relative_pvi#c.relative_pvi	0.000***	0.000***	0.000**	-0.000	0.000***	0.000
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.040***	0.040***	0.048***	-0.028**	0.051***	-0.027***
	(0.009)	(0.009)	(0.015)	(0.012)	(0.014)	(0.010)
District White %	0.348***	0.348***	0.146	-0.126	0.198	-0.092
	(0.090)	(0.090)	(0.158)	(0.120)	(0.143)	(0.108)
Senate	0.004	0.004	-0.008	-0.093**	-0.005	-0.097***
	(0.035)	(0.035)	(0.065)	(0.038)	(0.059)	(0.034)
Incumbent Primary	-0.398***	-0.398***	-0.408***	-0.317***	-0.403***	-0.262***
	(0.035)	(0.035)	(0.063)	(0.041)	(0.058)	(0.035)
Open Primary	-0.191***	-0.191***	-0.172***	-0.154***	-0.155***	-0.138***
	(0.031)	(0.031)	(0.057)	(0.044)	(0.054)	(0.039)
Election Year = 2008	0.026	0.026	0.076	-0.106	0.075	-0.096
	(0.042)	(0.042)	(0.083)	(0.072)	(0.076)	(0.063)
Election Year = 2010	0.018	0.018	-0.036	-0.169***	-0.048	-0.140***
	(0.042)	(0.042)	(0.085)	(0.061)	(0.079)	(0.054)
Election Year = 2012	-0.015	-0.015	0.046	-0.176***	0.034	-0.136**
	(0.040)	(0.040)	(0.079)	(0.062)	(0.073)	(0.054)
Election Year = 2014	-0.096**	-0.096**	-0.054	-0.125*	-0.049	-0.100*
	(0.043)	(0.043)	(0.083)	(0.065)	(0.077)	(0.057)
Election Year = 2016	-0.092**	-0.092**	-0.049	-0.086	-0.069	-0.074
	(0.042)	(0.042)	(0.077)	(0.065)	(0.073)	(0.056)
Election Year = 2018	-0.026	-0.026	-0.041	-0.080	-0.042	-0.059
	(0.039)	(0.039)	(0.071)	(0.063)	(0.067)	(0.055)
Constant	-0.265***	-0.265***	-0.179	0.560***	-0.227*	0.504***
	(0.084)	(0.084)	(0.140)	(0.123)	(0.131)	(0.111)
Observations	1,282	1,282	526	633	598	780
Number of groups	48	48	47	49	47	49

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.41 Between DW-NOMINATE Extreme & Primary Turnout

DV = DW-N vs median xtreg	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	0.010	0.034	0.007	-0.019	-0.039	-0.010
	(0.055)	(0.100)	(0.098)	(0.145)	(0.083)	(0.125)
Relative District PVI +/–	0.009***	0.012***	0.009***	0.012***	0.009***	0.013***
	(0.001)	(0.002)	(0.001)	(0.002)	(0.001)	(0.002)
c.relative_pvi#c.relative_pvi	-0.000***	-0.000***	-0.000**	-0.000***	-0.000***	-0.000***
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.003	-0.004	0.001	-0.007	0.001	-0.001
	(0.003)	(0.005)	(0.004)	(0.006)	(0.003)	(0.006)
District White %	0.003	-0.054	0.012	-0.036	0.018	-0.031
	(0.023)	(0.040)	(0.037)	(0.051)	(0.032)	(0.049)
Senate	0.066***	0.043**	0.046**	0.020	0.045**	0.019
	(0.015)	(0.020)	(0.020)	(0.023)	(0.019)	(0.023)
Incumbent Primary	0.007	-0.035***	-0.016	-0.033*	-0.017	-0.035**
	(0.010)	(0.012)	(0.017)	(0.020)	(0.015)	(0.017)
Open Primary	0.027**	0.004	-0.009	0.029	-0.011	0.029
	(0.011)	(0.013)	(0.019)	(0.021)	(0.017)	(0.019)
Election Year = 2008	0.013	-0.020	-0.000	-0.043	0.013	-0.052**
	(0.011)	(0.017)	(0.020)	(0.030)	(0.017)	(0.027)
Election Year = 2010	0.023**	-0.027*	0.011	-0.073***	0.009	-0.070***
	(0.011)	(0.016)	(0.019)	(0.026)	(0.017)	(0.023)
Election Year = 2012	-0.004	-0.053***	-0.010	-0.099***	-0.015	-0.098***
	(0.010)	(0.015)	(0.018)	(0.026)	(0.016)	(0.023)
Election Year = 2014	-0.013	-0.050***	-0.008	-0.098***	-0.015	-0.100***
	(0.012)	(0.016)	(0.023)	(0.027)	(0.019)	(0.024)
Election Year = 2016	-0.034***	-0.049***	-0.030	-0.084***	-0.034**	-0.088***
	(0.011)	(0.016)	(0.019)	(0.027)	(0.016)	(0.023)
Election Year = 2018	-0.015	-0.075***	-0.022	-0.097***	-0.023	-0.109***
	(0.010)	(0.016)	(0.017)	(0.027)	(0.015)	(0.024)
Election Year = 2020	-0.018	-0.056***	-0.031*	-0.127***	-0.020	-0.114***
	(0.011)	(0.017)	(0.019)	(0.029)	(0.016)	(0.025)
Constant	-0.121***	0.034	-0.082**	0.069	-0.078***	0.039
	(0.022)	(0.044)	(0.034)	(0.062)	(0.030)	(0.058)
Observations	833	986	371	463	453	604
Number of districts	313	321	206	230	228	262

Standard errors in parentheses
*** $p<0.01$, ** $p<0.05$, * $p<0.1$

Table 11.42 Between DW-NOMINATE Extreme & Primary Turnout: Multilevel Model

DV = DW-N vs median mixed	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	0.054	0.054	0.092	0.017	0.031	0.053
	(0.057)	(0.057)	(0.095)	(0.164)	(0.083)	(0.149)
Relative District PVI +/−	0.009***	0.009***	0.009***	0.012***	0.009***	0.013***
	(0.001)	(0.001)	(0.001)	(0.002)	(0.001)	(0.002)
c.relative_pvi#c.relative_pvi	-0.000***	-0.000***	-0.000***	-0.000***	-0.000***	-0.000***
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	0.001	0.001	-0.000	0.005	-0.001	0.007
	(0.002)	(0.002)	(0.003)	(0.005)	(0.003)	(0.005)
District White %	0.020	0.020	0.001	0.064	0.021	0.061
	(0.019)	(0.019)	(0.030)	(0.057)	(0.026)	(0.055)
Senate	0.069***	0.069***	0.052***	0.047***	0.050***	0.042***
	(0.010)	(0.010)	(0.016)	(0.016)	(0.014)	(0.016)
Incumbent Primary	0.009	0.009	-0.023	-0.056***	-0.021	-0.057***
	(0.011)	(0.011)	(0.018)	(0.020)	(0.017)	(0.018)
Open Primary	0.031**	0.031**	-0.006	0.007	-0.007	0.005
	(0.012)	(0.012)	(0.020)	(0.022)	(0.019)	(0.020)
Election Year = 2008	0.018	0.018	0.002	-0.045	0.019	-0.043
	(0.014)	(0.014)	(0.023)	(0.032)	(0.021)	(0.030)
Election Year = 2010	0.020	0.020	0.013	-0.091***	0.011	-0.079***
	(0.013)	(0.013)	(0.022)	(0.028)	(0.020)	(0.026)
Election Year = 2012	-0.001	-0.001	-0.012	-0.127***	-0.013	-0.104***
	(0.013)	(0.013)	(0.021)	(0.028)	(0.019)	(0.026)
Election Year = 2014	-0.006	-0.006	0.009	-0.130***	0.003	-0.118***
	(0.015)	(0.015)	(0.026)	(0.029)	(0.023)	(0.027)
Election Year = 2016	-0.031**	-0.031**	-0.023	-0.118***	-0.027	-0.105***
	(0.014)	(0.014)	(0.022)	(0.029)	(0.020)	(0.026)
Election Year = 2018	-0.012	-0.012	-0.017	-0.128***	-0.016	-0.122***
	(0.013)	(0.013)	(0.019)	(0.029)	(0.018)	(0.027)
Election Year = 2020	-0.018	-0.018	-0.047**	-0.171***	-0.027	-0.142***
	(0.013)	(0.013)	(0.020)	(0.031)	(0.019)	(0.027)
Constant	-0.129***	-0.129***	-0.077**	-0.051	-0.078***	-0.072
	(0.020)	(0.020)	(0.031)	(0.063)	(0.028)	(0.059)
Observations	833	833	371	463	453	604
Number of groups	46	46	39	44	41	43

Standard errors in parentheses

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

Table 11.43 Absolute CFscore & Primary Turnout

DV = CFscore xtreg	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	0.120	0.285	-0.259	0.155	-0.185	-0.003
	(0.241)	(0.264)	(0.447)	(0.388)	(0.403)	(0.299)
Relative District PVI +/−	0.004**	-0.002	0.006**	0.002	0.006**	-0.001
	(0.002)	(0.001)	(0.003)	(0.002)	(0.003)	(0.002)
c.relative_pvi#c.relative_pvi	-0.000***	0.000**	-0.000*	-0.000	-0.000*	0.000
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	-0.051***	-0.046***	-0.045***	-0.050***	-0.052***	-0.049***
	(0.009)	(0.008)	(0.015)	(0.013)	(0.014)	(0.012)
District White %	-0.313***	-0.066	-0.180	-0.159	-0.165	-0.089
	(0.085)	(0.071)	(0.142)	(0.105)	(0.129)	(0.098)
Senate	0.023	-0.049	0.019	-0.073	-0.002	-0.071
	(0.051)	(0.039)	(0.076)	(0.051)	(0.071)	(0.053)
Incumbent Primary	0.344***	-0.215***	0.335***	-0.316***	0.334***	-0.235***
	(0.036)	(0.026)	(0.063)	(0.042)	(0.059)	(0.033)
Open Primary	0.181***	-0.123***	0.144**	-0.149***	0.132**	-0.095***
	(0.030)	(0.026)	(0.057)	(0.042)	(0.055)	(0.034)
Election Year = 2008	-0.027	-0.007	-0.088	-0.105	-0.081	-0.075
	(0.039)	(0.037)	(0.080)	(0.065)	(0.073)	(0.051)
Election Year = 2010	-0.021	0.008	0.011	-0.107*	0.038	-0.035
	(0.040)	(0.033)	(0.082)	(0.057)	(0.076)	(0.044)
Election Year = 2012	-0.080**	0.006	-0.164**	-0.091	-0.150**	-0.023
	(0.037)	(0.034)	(0.076)	(0.057)	(0.069)	(0.044)
Election Year = 2014	-0.058	0.061*	-0.126	-0.038	-0.126*	0.033
	(0.041)	(0.035)	(0.081)	(0.060)	(0.075)	(0.047)
Election Year = 2016	-0.105***	0.104***	-0.175**	0.017	-0.160**	0.065
	(0.040)	(0.035)	(0.074)	(0.060)	(0.069)	(0.046)
Election Year = 2018	-0.261***	0.114***	-0.263***	0.067	-0.267***	0.096**
	(0.037)	(0.036)	(0.069)	(0.058)	(0.064)	(0.046)
Constant	-0.568***	1.390***	-0.641***	1.628***	-0.612***	1.490***
	(0.083)	(0.074)	(0.137)	(0.117)	(0.127)	(0.106)
Observations	1,282	1,394	526	633	598	780
Number of districts	459	454	311	334	333	368

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.44 Absolute CFscore & Primary Turnout: Multilevel Model

DV = CFscore mixed	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	0.383	0.383	0.050	0.328	0.155	0.166
	(0.257)	(0.257)	(0.479)	(0.442)	(0.438)	(0.374)
Relative District PVI +/−	0.004**	0.004**	0.007**	0.000	0.006**	-0.002
	(0.002)	(0.002)	(0.003)	(0.002)	(0.003)	(0.002)
c.relative_pvi#c.relative_pvi	-0.000***	-0.000***	-0.000**	-0.000	-0.000***	0.000
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	-0.040***	-0.040***	-0.048***	-0.027**	-0.051***	-0.026**
	(0.009)	(0.009)	(0.015)	(0.012)	(0.014)	(0.010)
District White %	-0.349***	-0.349***	-0.144	-0.133	-0.201	-0.098
	(0.091)	(0.091)	(0.159)	(0.120)	(0.143)	(0.108)
Senate	0.003	0.003	0.009	-0.094**	0.005	-0.099***
	(0.035)	(0.035)	(0.066)	(0.038)	(0.059)	(0.034)
Incumbent Primary	0.402***	0.402***	0.412***	-0.329***	0.408***	-0.271***
	(0.035)	(0.035)	(0.063)	(0.041)	(0.058)	(0.035)
Open Primary	0.191***	0.191***	0.171***	-0.165***	0.154***	-0.147***
	(0.031)	(0.031)	(0.057)	(0.044)	(0.054)	(0.039)
Election Year = 2008	-0.035	-0.035	-0.087	-0.046	-0.086	-0.037
	(0.042)	(0.042)	(0.083)	(0.072)	(0.076)	(0.063)
Election Year = 2010	-0.019	-0.019	0.036	-0.067	0.048	-0.038
	(0.042)	(0.042)	(0.085)	(0.061)	(0.079)	(0.054)
Election Year = 2012	-0.071*	-0.071*	-0.131*	-0.087	-0.120	-0.049
	(0.040)	(0.040)	(0.079)	(0.062)	(0.073)	(0.054)
Election Year = 2014	-0.058	-0.058	-0.101	-0.036	-0.106	-0.011
	(0.043)	(0.043)	(0.083)	(0.065)	(0.077)	(0.057)
Election Year = 2016	-0.106**	-0.106**	-0.146*	0.020	-0.132*	0.034
	(0.042)	(0.042)	(0.077)	(0.065)	(0.073)	(0.056)
Election Year = 2018	-0.280***	-0.280***	-0.263***	0.047	-0.262***	0.067
	(0.039)	(0.039)	(0.071)	(0.063)	(0.067)	(0.055)
Constant	-0.628***	-0.628***	-0.718***	1.494***	-0.667***	1.440***
	(0.085)	(0.085)	(0.141)	(0.123)	(0.131)	(0.111)
Observations	1,282	1,282	526	633	598	780
Number of groups	48	48	47	49	47	49

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.45 Absolute DW-NOMINATE & Primary Turnout

DV = DW-NOMINATE xtreg	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	-0.008	0.039	0.011	-0.016	0.048	-0.007
	(0.055)	(0.100)	(0.098)	(0.144)	(0.083)	(0.125)
Relative District PVI +/−	-0.009***	0.012***	-0.009***	0.012***	-0.009***	0.013***
	(0.001)	(0.002)	(0.001)	(0.002)	(0.001)	(0.002)
c.relative_pvi#c.relative_pvi	0.000***	-0.000***	0.000**	-0.000***	0.000***	-0.000***
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	-0.003	-0.004	-0.001	-0.007	-0.001	-0.002
	(0.003)	(0.005)	(0.004)	(0.006)	(0.003)	(0.006)
District White %	-0.005	-0.056	-0.018	-0.036	-0.023	-0.030
	(0.023)	(0.040)	(0.037)	(0.051)	(0.032)	(0.049)
Senate	-0.011	0.004	0.010	-0.024	0.011	-0.024
	(0.015)	(0.020)	(0.020)	(0.022)	(0.018)	(0.023)
Incumbent Primary	-0.003	-0.036***	0.017	-0.032*	0.018	-0.035**
	(0.010)	(0.012)	(0.017)	(0.019)	(0.015)	(0.017)
Open Primary	-0.024**	0.003	0.010	0.028	0.011	0.028
	(0.011)	(0.013)	(0.019)	(0.021)	(0.017)	(0.019)
Election Year = 2008	0.005	-0.011	0.020	-0.034	0.007	-0.043
	(0.011)	(0.017)	(0.020)	(0.029)	(0.017)	(0.026)
Election Year = 2010	-0.004	0.013	0.011	-0.033	0.012	-0.030
	(0.011)	(0.016)	(0.019)	(0.026)	(0.017)	(0.023)
Election Year = 2012	-0.009	0.009	-0.003	-0.038	0.002	-0.036
	(0.010)	(0.015)	(0.018)	(0.026)	(0.016)	(0.023)
Election Year = 2014	-0.003	0.015	-0.009	-0.032	-0.002	-0.035
	(0.012)	(0.016)	(0.023)	(0.027)	(0.019)	(0.024)
Election Year = 2016	0.013	0.014	0.009	-0.022	0.013	-0.024
	(0.011)	(0.016)	(0.019)	(0.026)	(0.016)	(0.023)
Election Year = 2018	0.013	0.016	0.021	-0.006	0.021	-0.018
	(0.010)	(0.016)	(0.017)	(0.027)	(0.015)	(0.024)
Election Year = 2020	0.011	0.026	0.024	-0.043	0.014	-0.031
	(0.011)	(0.017)	(0.019)	(0.029)	(0.016)	(0.025)
Constant	-0.252***	0.460***	-0.291***	0.494***	-0.294***	0.464***
	(0.022)	(0.044)	(0.034)	(0.062)	(0.030)	(0.058)
Observations	833	986	371	463	453	604
Number of districts	313	321	206	230	228	262

Standard errors in parentheses
*** $p<0.01$, ** $p<0.05$, * $p<0.1$

Table 11.46 Absolute DW-NOMINATE & Primary Turnout: Multilevel Model

DV = DW-NOMINATE mixed	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	-0.050	-0.050	-0.076	0.024	-0.020	0.060
	(0.058)	(0.058)	(0.095)	(0.163)	(0.083)	(0.149)
Relative District PVI +/−	-0.009***	-0.009***	-0.009***	0.012***	-0.010***	0.014***
	(0.001)	(0.001)	(0.001)	(0.002)	(0.001)	(0.002)
c.relative_pvi#c.relative_pvi	0.000***	0.000***	0.000***	-0.000***	0.000***	-0.000***
	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)	(0.000)
Median Income ($10,000s)	-0.001	-0.001	0.000	0.005	0.001	0.007
	(0.002)	(0.002)	(0.003)	(0.005)	(0.003)	(0.005)
District White %	-0.022	-0.022	-0.006	0.063	-0.024	0.061
	(0.018)	(0.018)	(0.030)	(0.057)	(0.026)	(0.055)
Senate	-0.013	-0.013	0.006	0.005	0.007	0.001
	(0.010)	(0.010)	(0.016)	(0.016)	(0.014)	(0.016)
Incumbent Primary	-0.005	-0.005	0.025	-0.055***	0.022	-0.056***
	(0.011)	(0.011)	(0.018)	(0.019)	(0.017)	(0.018)
Open Primary	-0.027**	-0.027**	0.007	0.006	0.008	0.004
	(0.013)	(0.013)	(0.020)	(0.022)	(0.019)	(0.020)
Election Year = 2008	-0.001	-0.001	0.015	-0.035	-0.001	-0.033
	(0.014)	(0.014)	(0.023)	(0.032)	(0.021)	(0.030)
Election Year = 2010	-0.001	-0.001	0.006	-0.051*	0.008	-0.039
	(0.014)	(0.014)	(0.022)	(0.028)	(0.020)	(0.026)
Election Year = 2012	-0.012	-0.012	-0.002	-0.066**	-0.001	-0.042*
	(0.013)	(0.013)	(0.021)	(0.028)	(0.019)	(0.026)
Election Year = 2014	-0.011	-0.011	-0.027	-0.065**	-0.020	-0.053**
	(0.015)	(0.015)	(0.026)	(0.029)	(0.023)	(0.027)
Election Year = 2016	0.010	0.010	0.000	-0.056**	0.006	-0.042
	(0.014)	(0.014)	(0.022)	(0.029)	(0.020)	(0.026)
Election Year = 2018	0.009	0.009	0.014	-0.037	0.013	-0.031
	(0.013)	(0.013)	(0.019)	(0.029)	(0.018)	(0.027)
Election Year = 2020	0.009	0.009	0.038*	-0.087***	0.018	-0.058**
	(0.013)	(0.013)	(0.020)	(0.030)	(0.019)	(0.027)
Constant	-0.246***	-0.246***	-0.294***	0.373***	-0.294***	0.351***
	(0.020)	(0.020)	(0.031)	(0.062)	(0.028)	(0.059)
Observations	833	833	371	463	453	604
Number of groups	46	46	39	44	41	43

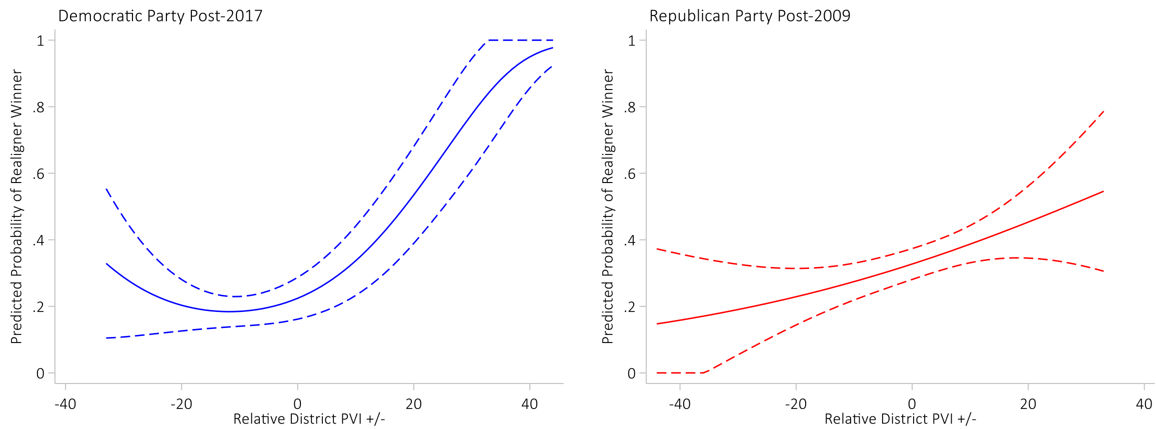
Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

11.4.2 Robustness Checks

This sub-section includes all analyses repeated using the previously established robustness checks of the winner receiving less than seventy-five percent of the vote, the second candidate receiving at least five percent of the vote, and a financial threshold where at least two candidates raised money.

11.4.2.1 Robustness Checks for 7.1 Results

Figure 11.29 Predicted Probability of Realigner Winner of Factional Primaries (Post-Transformation)



11.4.2.2 Robustness Checks for 7.2 Results

Table 11.47 Incumbent Roll-Call, Donor Moderation & Likelihood of Any Primary Challenger (Winner 75% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-3.882***	-1.620**		
	(1.059)	(0.776)		
Incumbent CFscore Extremism (Relative)			-1.172***	-1.366***
			(0.341)	(0.494)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

Table 11.48 Incumbent Roll-Call, Donor Moderation & Likelihood of Any Primary Challenger (Second 5% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-2.780***	-0.891*		
	(0.843)	(0.541)		
Incumbent CFscore Extremism (Relative)			-0.969***	-0.475
			(0.259)	(0.378)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

Table 11.49 Incumbent Roll-Call, Donor Moderation & Likelihood of Any Primary Challenger (Money)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-2.478***	-0.982*		
	(0.898)	(0.557)		
Incumbent CFscore Extremism (Relative)			-0.813***	-0.798**
			(0.294)	(0.381)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

Table 11.50 Incumbent Roll-Call, Donor Moderation & Likelihood of Ideological Primary Challenger (Winner 75% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-10.438***	-4.666***		
	(1.675)	(1.068)		
Incumbent CFscore Extremism (Relative)			-2.128***	-2.536***
			(0.528)	(0.659)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

Table 11.51 Incumbent Roll-Call, Donor Moderation & Likelihood of Ideological Primary Challenger (Second 5% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-7.348***	-4.696***		
	(1.177)	(0.725)		
Incumbent CFscore Extremism (Relative)			-1.187***	-1.974***
			(0.361)	(0.474)
Observations	1,678	1,596	1,443	1,438
Number of panel	359	340	338	337

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

Table 11.52 Incumbent Roll-Call, Donor Moderation & Likelihood of Ideological Primary Challenger (Money)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-7.031***	-4.346***		
	(1.193)	(0.781)		
Incumbent CFscore Extremism (Relative)			-1.199***	-1.946***
			(0.415)	(0.494)
Observations	1,678	1,596	1,443	1,438
Number of districts	359	340	338	337

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

Table 11.53 Incumbent Roll-Call, Donor Moderation & Quality Ideological Primary Challenger (Winner 75% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-12.399***	-3.029*		
	(4.672)	(1.748)		
Incumbent CFscore Extremism (Relative)			-3.210**	-3.711***
			(1.322)	(1.238)
Observations	242	362	163	330
Number of districts	147	180	110	177

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

Table 11.54 Incumbent Roll-Call, Donor Moderation & Quality Ideological Primary Challenger (Second 5% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-10.765**	-3.151*		
	(4.459)	(1.717)		
Incumbent CFscore Extremism (Relative)			-2.233*	-3.296***
			(1.215)	(1.127)
Observations	242	362	163	330
Number of districts	147	180	110	177

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

Table 11.55 Incumbent Roll-Call, Donor Moderation & Quality Ideological Primary Challenger (Money)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-12.578***	-2.605*		
	(4.824)	(1.562)		
Incumbent CFscore Extremism (Relative)			-2.548*	-3.126***
			(1.333)	(1.064)
Observations	242	362	163	330
Number of districts	147	180	110	177

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

Table 11.56 Incumbent Roll-Call, Donor Moderation & Competitiveness of Any Primary (Winner 75% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	0.081	-0.009		
	(0.071)	(0.042)		
Incumbent CFscore Extremism (Relative)			0.016	-0.036
			(0.027)	(0.025)
Observations	225	299	157	278
Number of districts	141	160	112	160

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

Table 11.57 Incumbent Roll-Call, Donor Moderation & Competitiveness of Any Primary (Second 5% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-0.171**	-0.081*		
	(0.080)	(0.047)		
Incumbent CFscore Extremism (Relative)			-0.041*	-0.095***
			(0.024)	(0.030)
Observations	576	659	463	592
Number of districts	228	253	211	243

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

Table 11.58 Incumbent Roll-Call, Donor Moderation & Competitiveness of Any Primary (Money)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-0.132	-0.034		
	(0.094)	(0.052)		
Incumbent CFscore Extremism (Relative)			-0.040	-0.082**
			(0.033)	(0.035)
Observations	324	444	250	403
Number of districts	181	219	155	210

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

Table 11.59 Incumbent Roll-Call, Donor Moderation & Competitiveness of Ideological Primary (Winner 75% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	0.039	0.007		
	(0.156)	(0.047)		
Incumbent CFscore Extremism (Relative)			-0.109	-0.029
			(0.075)	(0.027)
Observations	102	187	56	178
Number of districts	81	114	47	116

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

Table 11.60 Incumbent Roll-Call, Donor Moderation & Competitiveness of Ideological Primary (Second 5% Threshold)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-0.504***	-0.029		
	(0.120)	(0.066)		
Incumbent CFscore Extremism (Relative)			-0.083**	-0.096**
			(0.035)	(0.040)
Observations	232	360	156	328
Number of districts	144	180	109	177

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

Table 11.61 Incumbent Roll-Call, Donor Moderation & Competitiveness of Ideological Primary (Money)

DV = Contested Incumbent Primary	Democratic	Republican	Democratic	Republican
Incumbent DW-N Extremism (Relative)	-0.454***	-0.002		
	(0.151)	(0.060)		
Incumbent CFscore Extremism (Relative)			-0.085	-0.087**
			(0.054)	(0.039)
Observations	148	264	91	240
Number of districts	113	153	74	149

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

11.4.2.3 Robustness Checks for 7.3 Results

Table 11.62 Any Primary Contest & Nominee Donor Extremism (Winner 75% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Contested Primary (75%)	0.035**	0.048***	-0.036	0.072*	-0.022	-0.023**	-0.060	0.033
	(0.018)	(0.014)	(0.032)	(0.038)	(0.018)	(0.010)	(0.047)	(0.049)
Observations	2,968	2,770	1,220	1,036	1,443	1,438	303	296
Number of districts	496	496	340	341	338	337	246	244

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

Table 11.63 Any Primary Contest & Nominee Donor Extremism (Second 5% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Contested Primary (5%)	0.013	0.031**	-0.036	0.064	-0.035***	-0.013*	-0.057	0.027
	(0.016)	(0.014)	(0.033)	(0.040)	(0.012)	(0.007)	(0.051)	(0.061)
Observations	2,968	2,770	1,220	1,036	1,443	1,438	303	296
Number of districts	496	496	340	341	338	337	246	244

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

Table 11.64 Any Primary Contest & Nominee Donor Extremism (Money)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Contested Primary	0.034**	0.028**	-0.008	0.046	-0.024*	-0.013	-0.078*	0.039
(Money)	(0.017)	(0.012)	(0.036)	(0.030)	(0.014)	(0.008)	(0.047)	(0.048)
Observations	2,968	2,770	1,220	1,036	1,443	1,438	303	296
Number of districts	496	496	340	341	338	337	246	244

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

Table 11.65 Any Primary Contest & Roll-Call Position (Winner 75% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Contested Primary (75%)	-0.008*	0.009*	-0.014	0.031	-0.020***	-0.010	0.013	0.012
	(0.004)	(0.005)	(0.014)	(0.027)	(0.006)	(0.006)	(0.019)	(0.036)
Observations	1,992	1,971	154	159	1,676	1,593	159	218
Number of districts	380	350	132	129	359	340	137	177

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

Table 11.66 Any Primary Contest & Roll-Call Position (Second 5% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Contested Primary (5%)	-0.009***	0.003	-0.007	0.029	-0.014***	-0.007	0.014	-0.007
	(0.003)	(0.004)	(0.017)	(0.030)	(0.004)	(0.004)	(0.022)	(0.050)
Observations	1,992	1,971	154	159	1,676	1,593	159	218
Number of districts	380	350	132	129	359	340	137	177

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

Table 11.67 Any Primary Contest & Roll-Call Position (Money)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Contested Primary	-0.008**	0.005	-0.003	0.020	-0.015***	-0.006	-0.014	0.003
(Money)	(0.004)	(0.004)	(0.016)	(0.027)	(0.005)	(0.005)	(0.019)	(0.033)
Observations	1,992	1,971	154	159	1,676	1,593	159	218
Number of districts	380	350	132	129	359	340	137	177

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

11.4.2.4 Robustness Checks for 7.3.1 Results

Table 11.68 Factional Primary Contest & Nominee Donor Extremism (Winner 75% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Factional Primary (75%)	0.043	0.023	0.012	0.049	-0.021	-0.044***	0.075	0.046*
	(0.031)	(0.025)	(0.048)	(0.048)	(0.029)	(0.015)	(0.060)	(0.026)
Observations	1,282	1,396	575	540	484	601	223	254
Number of districts	459	454	278	277	212	244	190	214

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

Table 11.69 Factional Primary Contest & Nominee Donor Extremism (Second 5% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Factional Primary (5%)	0.019	-0.004	0.024	0.031	0.010	-0.027**	0.058	0.075***
	(0.026)	(0.022)	(0.045)	(0.044)	(0.022)	(0.013)	(0.058)	(0.027)
Observations	1,282	1,396	575	540	484	601	223	254
Number of districts	459	454	278	277	212	244	190	214

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

Table 11.70 Factional Primary Contest & Nominee Donor Extremism (Money)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Factional Primary	0.006	0.005	-0.033	0.051	0.025	-0.026**	0.015	0.047*
(Money)	(0.028)	(0.023)	(0.048)	(0.051)	(0.027)	(0.013)	(0.062)	(0.026)
Observations	1,282	1,396	575	540	484	601	223	254
Number of districts	459	454	278	277	212	244	190	214

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

Table 11.71 Ideological Primary Contest & Nominee Donor Extremism (Winner 75% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Ideological Primary (75%)	0.033	0.018	0.000	0.042	-0.022	-0.031**	0.098*	0.010
	(0.030)	(0.023)	(0.046)	(0.044)	(0.027)	(0.014)	(0.058)	(0.027)
Observations	1,282	1,396	575	540	484	601	223	254
Number of districts	459	454	278	277	212	244	190	214

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

Table 11.72 Ideological Primary Contest & Nominee Donor Extremism (Second 5% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Ideological Primary (5%)	0.000	-0.001	0.015	0.032	-0.004	-0.015	0.081	0.036
	(0.025)	(0.022)	(0.044)	(0.043)	(0.022)	(0.014)	(0.055)	(0.028)
Observations	1,282	1,396	575	540	484	601	223	254
Number of districts	459	454	278	277	212	244	190	214

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

Table 11.73 Ideological Primary Contest & Nominee Donor Extremism (Money)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Ideological Primary	-0.006	0.011	-0.036	0.046	0.012	-0.011	0.041	0.023
(Money)	(0.026)	(0.022)	(0.046)	(0.047)	(0.025)	(0.013)	(0.061)	(0.027)
Observations	1,282	1,396	575	540	484	601	223	254
Number of districts	459	454	278	277	212	244	190	214

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

Table 11.74 Factional Primary Contest & Roll-Call Position (Winner 75% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Factional Primary (75%)	-0.011	-0.028***	0.025	-0.028	-0.023**	-0.036***	-0.016	-0.025
	(0.008)	(0.008)	(0.024)	(0.030)	(0.009)	(0.009)	(0.023)	(0.023)
Observations	833	987	97	117	604	666	132	203
Number of districts	313	321	90	103	231	253	116	168

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

Table 11.75 Factional Primary Contest & Roll-Call Position (Second 5% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Factional Primary (5%)	-0.007	-0.046***	0.033	-0.064**	-0.011*	-0.039***	-0.032	-0.025
	(0.006)	(0.008)	(0.020)	(0.031)	(0.006)	(0.009)	(0.023)	(0.022)
Observations	833	987	97	117	604	666	132	203
Number of districts	313	321	90	103	231	253	116	168

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

Table 11.76 Factional Primary Contest & Roll-Call Position (Money)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Factional Primary	-0.013*	-0.035***	0.035	-0.058*	-0.017**	-0.030***	-0.041*	-0.024
(Money)	(0.007)	(0.008)	(0.022)	(0.032)	(0.008)	(0.009)	(0.023)	(0.022)
Observations	833	987	97	117	604	666	132	203
Number of districts	313	321	90	103	231	253	116	168

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

Table 11.77 Ideological Primary Contest & Roll-Call Position (Winner 75% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Ideological Primary (75%)	-0.007	-0.007	0.036	-0.008	-0.018**	-0.017*	-0.009	-0.005
	(0.007)	(0.007)	(0.022)	(0.027)	(0.008)	(0.009)	(0.023)	(0.021)
Observations	833	987	97	117	604	666	132	203
Number of districts	313	321	90	103	231	253	116	168

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

Table 11.78 Ideological Primary Contest & Roll-Call Position (Second 5% Threshold)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Ideological Primary (5%)	-0.002	-0.021***	0.042**	-0.025	-0.006	-0.020**	-0.025	-0.002
	(0.006)	(0.007)	(0.019)	(0.057)	(0.006)	(0.009)	(0.023)	(0.021)
Observations	833	987	97	117	604	666	132	203
Number of districts	313	321	90	103	231	253	116	168

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

Table 11.79 Ideological Primary Contest & Roll-Call Position (Money)

	Democratic All	Republican All	Democratic Challenger	Republican Challenger	Democratic Incumbent	Republican Incumbent	Democratic Open	Republican Open
Ideological Primary	-0.007	-0.011	0.045**	-0.025	-0.009	-0.010	-0.035	-0.006
(Money)	(0.006)	(0.007)	(0.021)	(0.057)	(0.007)	(0.009)	(0.022)	(0.021)
Observations	833	987	97	117	604	666	132	203
Number of districts	313	321	90	103	231	253	116	168

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

11.4.2.5 Robustness Checks for 7.4 Results

Table 11.80 Absolute CFscore & Primary Turnout

DV = CFscore xtreg	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	0.120	0.285	-0.259	0.155	-0.185	-0.003
	(0.241)	(0.264)	(0.447)	(0.388)	(0.403)	(0.299)
Observations	1,282	1,394	526	633	598	780
Number of districts	459	454	311	334	333	368

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Table 11.81 Absolute DW-NOMINATE & Primary Turnout

DV = DW-NOMINATE xtreg	Democratic All	Republican All	Democratic Factional	Republican Factional	Democratic Ideological	Republican Ideological
Primary Turnout %	-0.008	0.039	0.011	-0.016	0.048	-0.007
	(0.055)	(0.100)	(0.098)	(0.144)	(0.083)	(0.125)
Observations	833	986	371	463	453	604
Number of districts	313	321	206	230	228	262

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

11.5 Chapter Eight

11.5.1 Descriptive Statistics

Table 11.82 Democratic Descriptive Statistics

Variable	Obs	Mean	Std. Dev.	Min	Max
Nokken-Poole (Raw)	1674	-.388	.132	-.954	.091
Nokken-Poole Movement: t0 to t1	1426	-.006	.084	-.526	.668
Nokken-Poole Movement: t0 to t2	1060	-.005	.082	-.409	.418
Nokken-Poole Movement: t0 to t3	763	-.006	.087	-.355	.514
Nokken-Poole Movement: t0 to t4	537	-.007	.094	-.361	.379
Nokken-Poole Movement: t0 to t5	544	.001	.066	-.228	.231
Nokken-Poole Movement: t-1 to t0	1091	-.001	.065	-.254	.668
Any Primary	1776	.398	.49	0	1
Factional Primary	682	.45	.498	0	1
Ideology – I Primary	707	.3	.459	0	1
Ideology – C Primary	707	.119	.324	0	1
Relative District PVI +/−	1776	11.569	12.337	-25	44
District White %	1776	.566	.244	.024	.958
Median Income ($10,000s)	1776	5.942	1.874	2.377	13.997

Table 11.83 Republican Descriptive Statistics

Variable	Obs	Mean	Std. Dev.	Min	Max
Nokken-Poole (Raw)	1616	.484	.166	0	1
Nokken-Poole Movement: t0 to t1	1360	-.004	.084	-.514	.375
Nokken-Poole Movement: t0 to t2	972	-.007	.1	-.514	.439
Nokken-Poole Movement: t0 to t3	668	-.01	.106	-.453	.484
Nokken-Poole Movement: t0 to t4	428	-.006	.116	-.438	.46
Nokken-Poole Movement: t0 to t5	436	.005	.099	-.484	.411
Nokken-Poole Movement: t-1 to t0	841	-.003	.078	-.514	.349
Any Primary	1669	.471	.499	0	1
Factional Primary	765	.475	.5	0	1
Ideology – I Primary	786	.411	.492	0	1
Ideology – C Primary	786	.08	.272	0	1
Relative District PVI +/−	1669	10.666	7.336	-10	33
District White %	1669	.756	.15	.13	.97
Median Income ($10,000s)	1669	5.728	1.358	2.841	12.463

11.5.2 Main Results with Controls

The below tables show the main results at t1 without the spatial controls applied in the main text and with the addition of temporal controls as a fixed effect per congress. In all cases, the main findings are substantively unchanged.

Table 11.84 Any Primary

DV: Movement (Nokken-Poole)	Democratic (Basic)	Democratic (Spatial Control)	Democratic (Spatial & Temporal)	Republican (Basic)	Republican (Spatial Controls)	Republican (Spatial & Temporal)
Any Primary	-0.010	-0.009	-0.007	-0.010	-0.010	-0.009
	(0.006)	(0.006)	(0.007)	(0.007)	(0.007)	(0.007)
Relative District PVI +/−		-0.001	-0.001		0.002	0.002*
		(0.001)	(0.001)		(0.001)	(0.001)
District White %		-0.003	-0.010		0.050	0.038
		(0.029)	(0.029)		(0.044)	(0.049)
Median Income ($10,000s)		-0.003	-0.002		-0.006	-0.001
		(0.002)	(0.003)		(0.005)	(0.007)
111th Congress			0.016**			0.002
			(0.007)			(0.008)
112th Congress			0.010			-0.014
			(0.009)			(0.011)
113th Congress			0.007			0.001
			(0.007)			(0.009)
114th Congress			0.012			-0.003
			(0.007)			(0.012)
115th Congress			0.005			-0.011
			(0.008)			(0.013)
116th Congress			0.015			-0.018
			(0.010)			(0.015)
117th Congress			-0.002			-0.008
			(0.013)			(0.016)
Constant	-0.002	0.030	0.018	0.001	-0.023	-0.037
	(0.002)	(0.021)	(0.025)	(0.003)	(0.037)	(0.053)
Observations	1,426	1,426	1,426	1,360	1,360	1,360
R-squared	0.003	0.005	0.012	0.003	0.006	0.011
Number of representatives	374	374	374	388	388	388

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

Table 11.85 Factional Primary

DV: Movement (Nokken-Poole)	Democratic (Basic)	Democratic (Spatial Control)	Democratic (Spatial & Temporal)	Republican (Basic)	Republican (Spatial Controls)	Republican (Spatial & Temporal)
Factional Primary	-0.023	-0.024	-0.014	0.051**	0.049**	0.052**
	(0.016)	(0.016)	(0.020)	(0.024)	(0.024)	(0.025)
Relative District PVI +/–		0.001	0.002		0.005	0.006
		(0.002)	(0.002)		(0.004)	(0.004)
District White %		0.023	0.020		0.139*	0.086
		(0.141)	(0.143)		(0.082)	(0.077)
Median Income ($10,000s)		0.001	0.011		-0.004	0.023
		(0.009)	(0.011)		(0.014)	(0.023)
111th Congress			-0.026			0.015
			(0.022)			(0.049)
112th Congress			0.023			-0.016
			(0.026)			(0.047)
113th Congress			-0.022			0.022
			(0.025)			(0.045)
114th Congress			0.002			-0.010
			(0.035)			(0.052)
115th Congress			-0.042			-0.027
			(0.032)			(0.052)
116th Congress			-0.011			-0.028
			(0.028)			(0.052)
117th Congress			-0.046			-0.038
			(0.034)			(0.055)
Constant	0.006	-0.020	-0.079	-0.043**	-0.177*	-0.299**
	(0.010)	(0.067)	(0.104)	(0.018)	(0.094)	(0.119)
Observations	228	228	228	295	295	295
R-squared	0.014	0.015	0.078	0.052	0.077	0.113
Number of representatives	124	124	124	138	138	138

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

Table 11.86 Movement Following Ideological and Centrist Challenges

	Democratic Ideological	Democratic Centrist	Republican Ideological	Republican Centrist
"Ideology – I" Primary	-0.012		0.030**	
	(0.011)		(0.015)	
"Ideology – C" Primary		-0.021		-0.028
		(0.015)		(0.027)
Relative District PVI +/–	-0.002	-0.002	0.002	0.002
	(0.002)	(0.002)	(0.003)	(0.003)
District White %	0.041	0.034	0.044	0.044
	(0.052)	(0.052)	(0.092)	(0.093)
Median Income ($10,000s)	0.002	0.001	0.001	0.003
	(0.006)	(0.006)	(0.012)	(0.012)
	-0.008	0.006	-0.086	-0.087
Constant	(0.050)	(0.049)	(0.081)	(0.083)
Observations	491	491	542	542
R-squared	0.008	0.011	0.024	0.013
Number of representatives	223	223	248	248

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

11.5.3 Robustness Checks

In the below sub-sections I present the results of several robustness checks: adding a further control for temporal (congress) fixed effects, using t–1 as the base category, including controls for performance and financial variation, and the thresholds used in previous chapters.

11.5.3.1 Additional Control for Congress Fixed Effects

Given the ongoing trend of polarization—with incumbents in both parties adopting more consistent partisan roll-call voting producing scores further from zero in more recent congresses—and the possibility of different voting behavior given the different set of bills to be voted on in congress, I repeat my main analyses with an additional control for temporal trends with a factor variable for each congress in the data.

Figure 11.30 All Primaries: Congress Fixed Effects

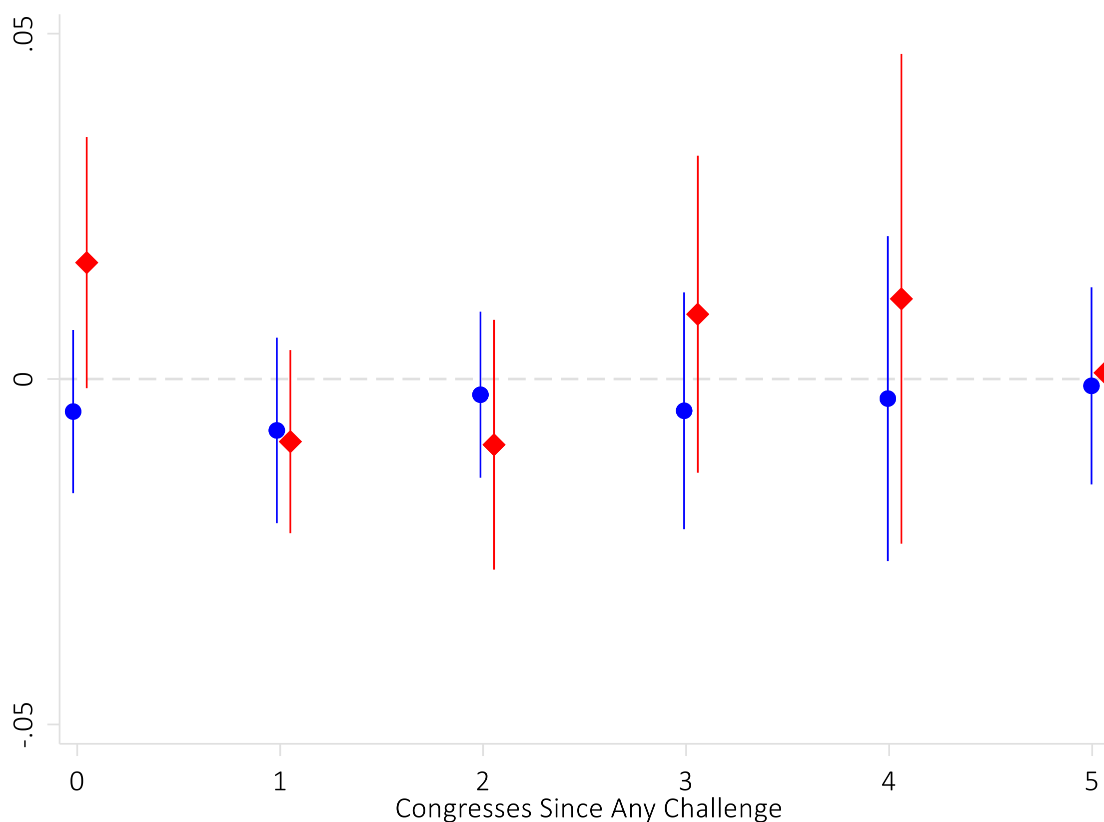


Figure 11.31 Factional Primaries: Congress Fixed Effects

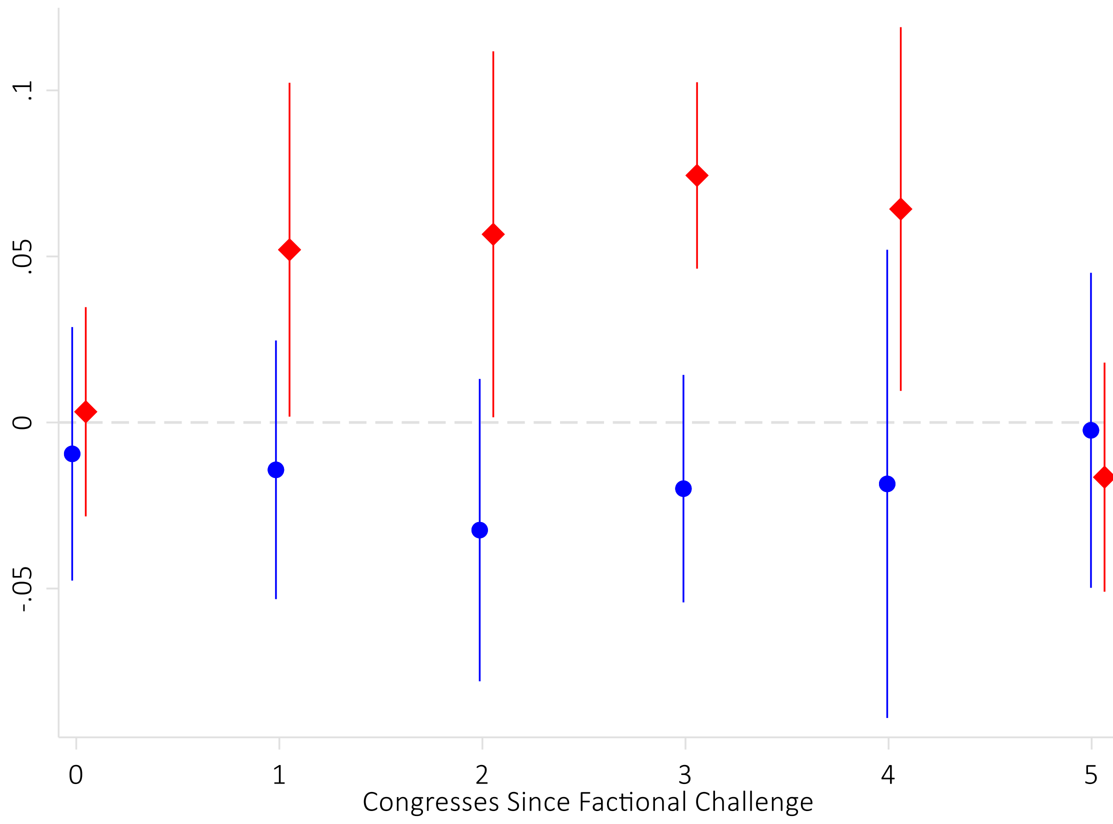
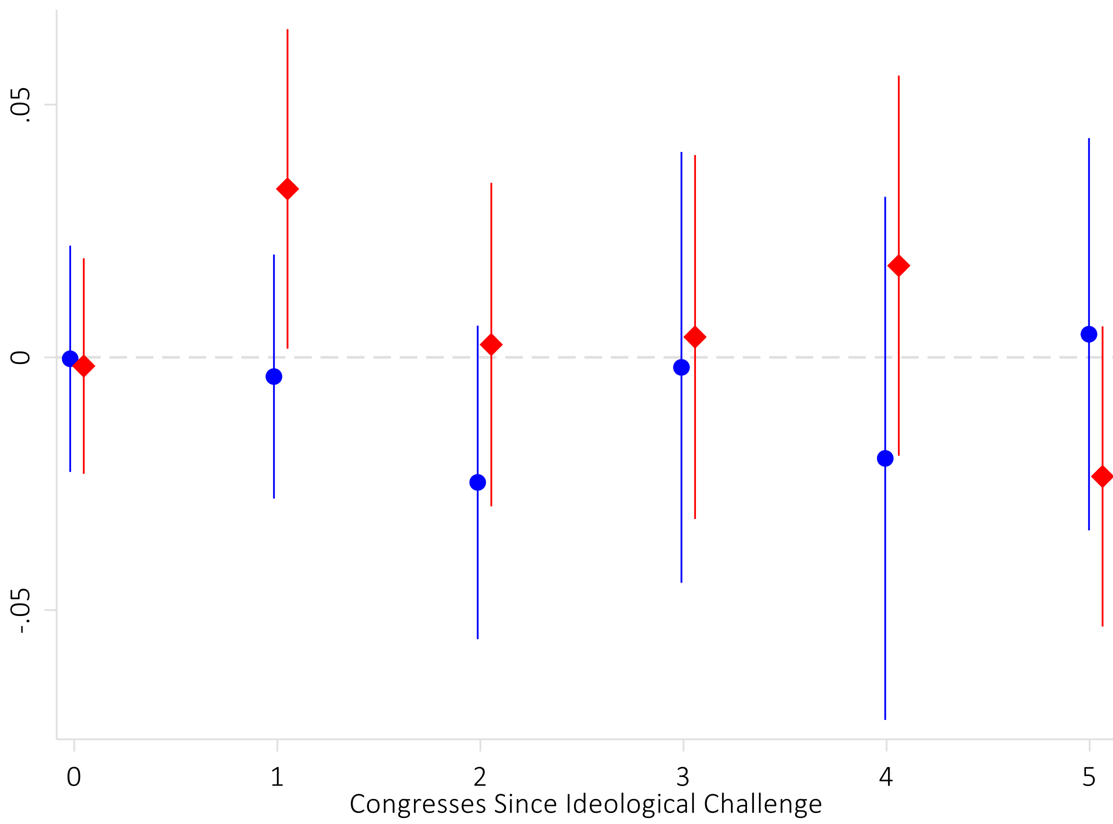


Figure 11.32 Ideological Primaries: Congress Fixed Effects



11.5.3.2 Using t–1 as Base Category

Using t–1 as the base category reduces the number of observations by removing members who never served in Congress without facing a primary election. As a result, these estimates are much less precise with wider confidence intervals, especially in later years. Given the non-significant differences between positions in t–1 and t0 in all models, the temporal endogeneity issues introduced by considering t0 as a post-treatment observation, and the alignment of trends between these and the main results, I argue that t0 serves as a preferable baseline category for the models. In the below models the coefficients for t0 as identical to those presented in the main results.

Figure 11.33 Any Primary: t–1 Baseline

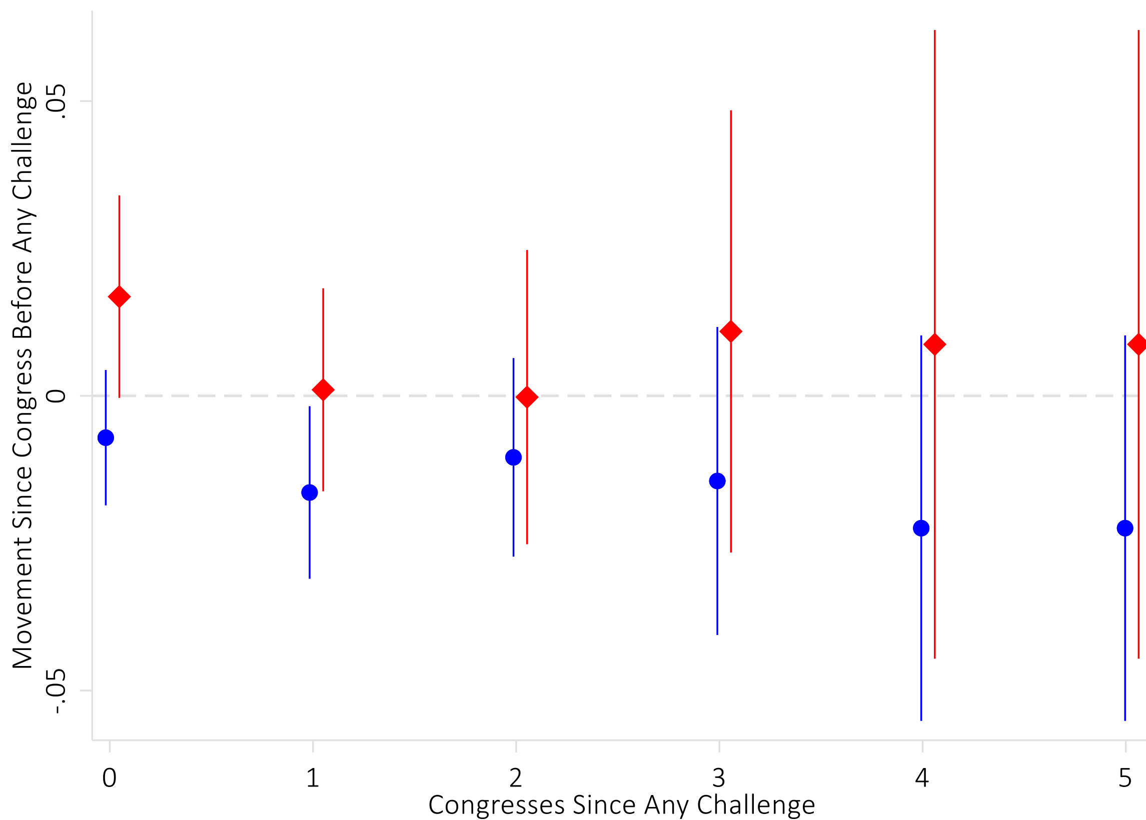


Figure 11.34 Factional Primary: t–1 Baseline

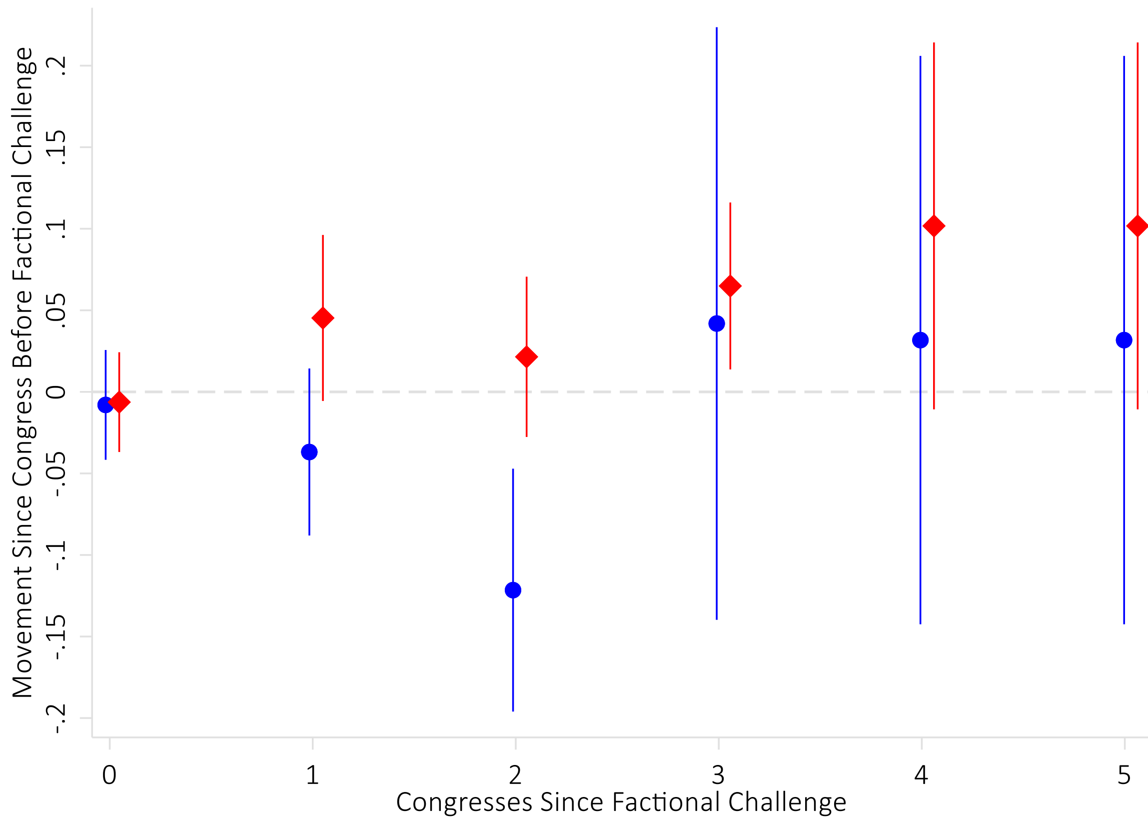
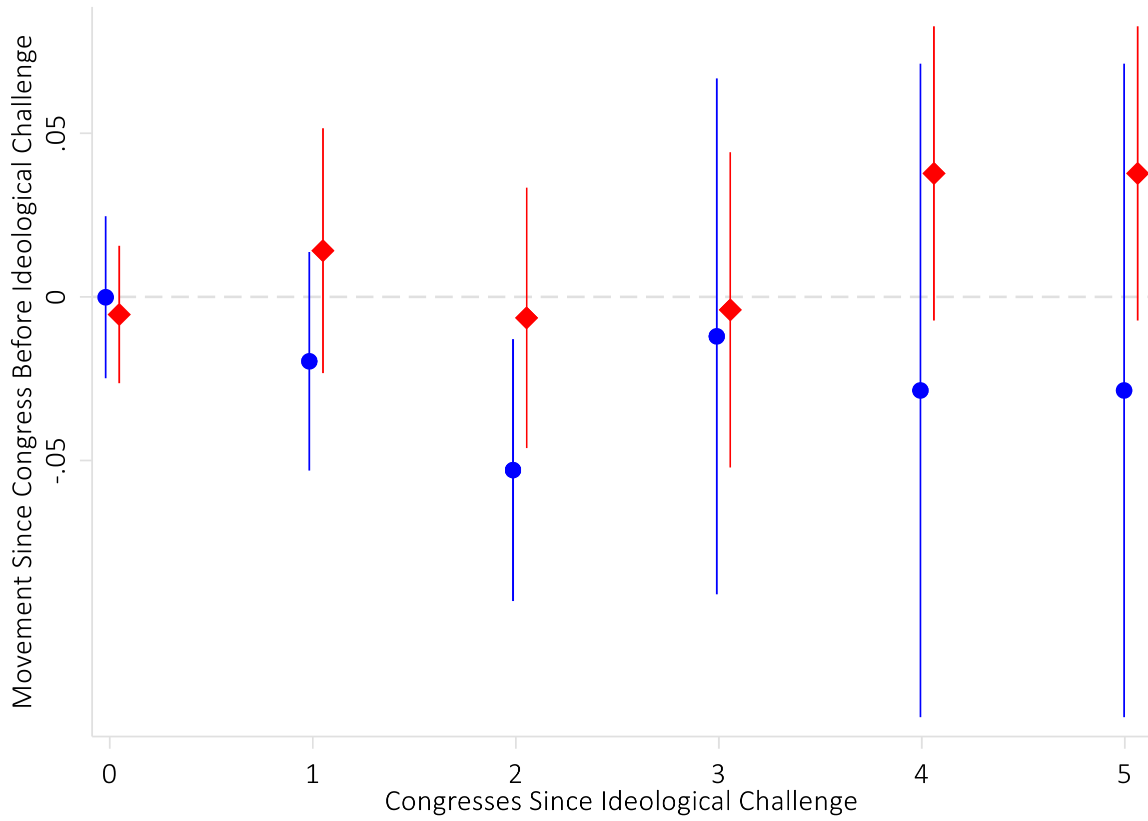


Figure 11.35 Ideological Primary: t–1 Baseline



11.5.3.3 Performance & Financial Variation

Not all primary challengers pose an equal threat to incumbents. In Table 11.87 I test incumbent movement following any primary based on challengers' performances in terms of primary vote share and money spent. These results are shown for $t1$, the congress immediately following the primary challenge. As in the main models the dependent variable is Nokken-Poole movement.

Table 11.87 Challenger Vote Share & Spending

	Democratic: Vote Share	Democratic: Money	Republican: Vote Share	Republican: Money
Challenger Vote %	0.067		0.153**	
	(0.063)		(0.071)	
Challenger Spending $		0.000		0.000
		(0.000)		(0.000)
Relative District PVI +/−	-0.002	-0.001*	0.003	0.001
	(0.002)	(0.001)	(0.003)	(0.001)
District White %	0.046	0.000	0.013	0.058
	(0.051)	(0.029)	(0.087)	(0.044)
Median Income ($10,000s)	0.001	-0.004	0.003	-0.007
	(0.006)	(0.002)	(0.012)	(0.005)
Constant	-0.018	0.031	-0.096	-0.022
	(0.052)	(0.021)	(0.080)	(0.037)
Observations	493	1,426	542	1,360
R-squared	0.008	0.004	0.025	0.003
Number of representatives	224	374	248	388

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

The only significant movement in Table 11.87 is Republican rightward movement following a challenger with a higher vote share. This aligns with the main findings, namely that Republicans move further rightward in the Congress immediately following an ideological or factional primary challenger. Democratic incumbents did not move in this way, with non-significant moderation rather than more consistent or extreme positioning. Challenger spending had no meaningful influence on subsequent roll-call voting by representatives in either party.

11.5.3.4 Thresholds

As in previous chapters, I repeat my main analyses under the three most used thresholds in the literature: winners receiving less than seventy-five percent of the vote, challengers receiving at least five percent of the vote, and challengers filing with the FEC.

Figure 11.36, Figure 11.37 and Figure 11.38 show the three main results using the threshold of incumbents receiving less than seventy-five percent of the vote. In all cases this vastly reduces the number of observations, but the substantive results largely align with those presented in the main text of the chapter.

Figure 11.36 Any Primary: 75% Threshold

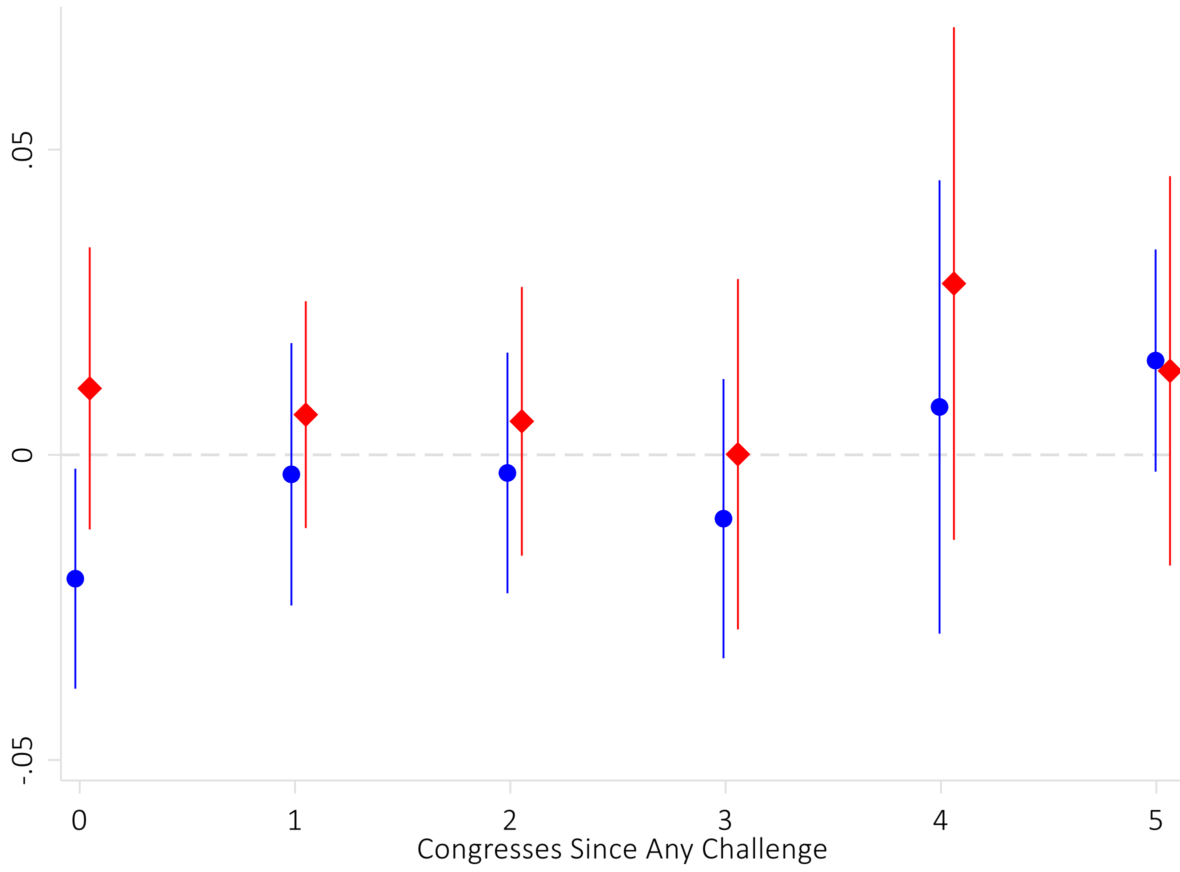


Figure 11.37 Factional Primary: 75% Threshold

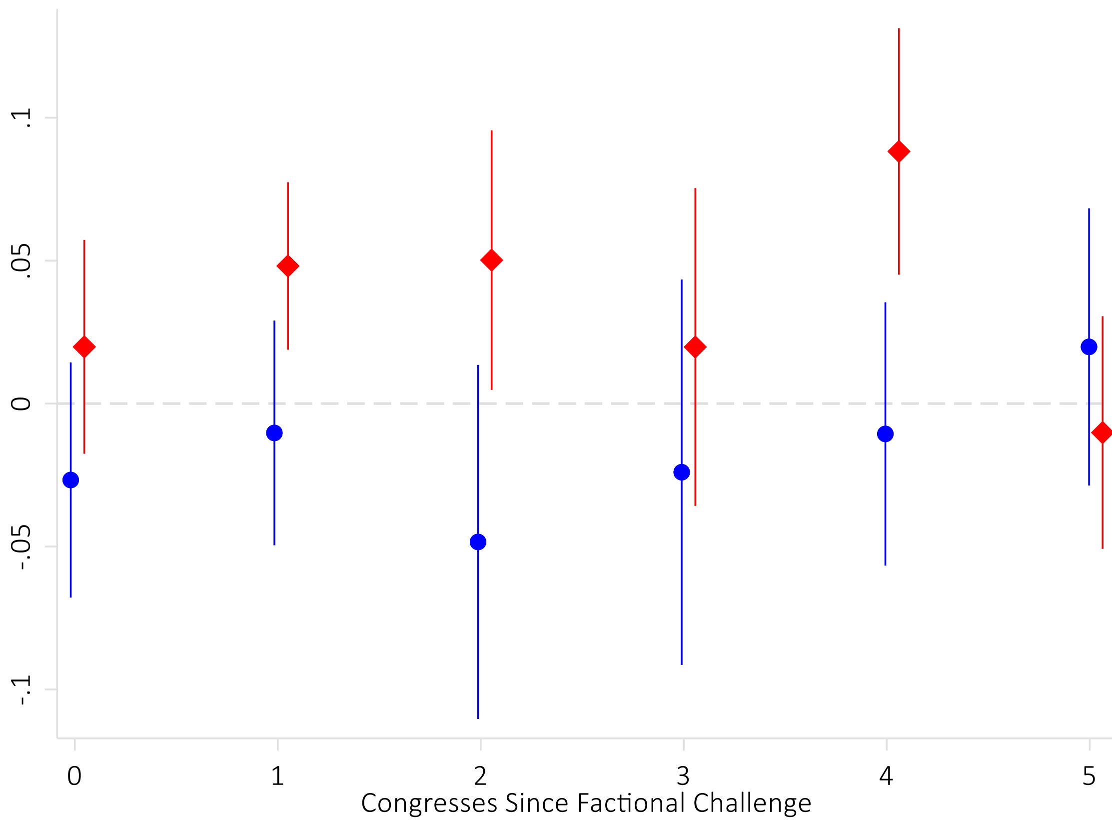


Figure 11.38 Ideological Primary: 75% Threshold

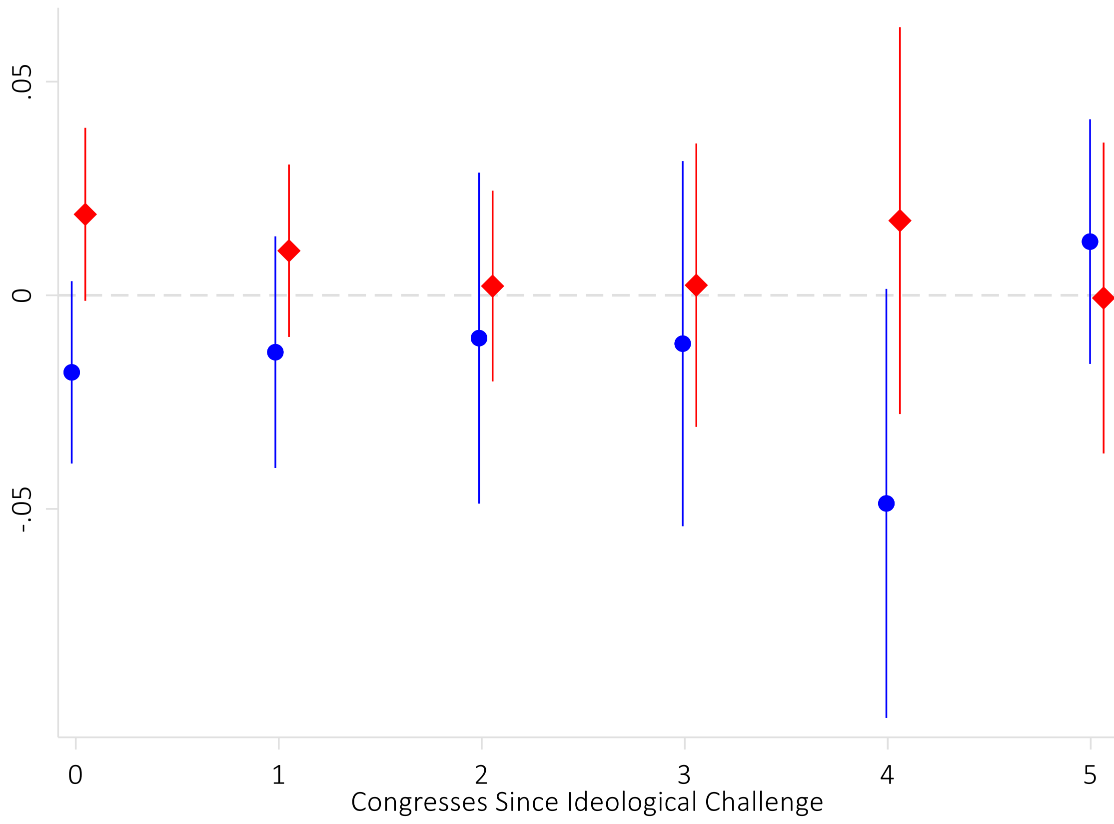


Figure 11.39 All Primaries: Challenger 5% Threshold

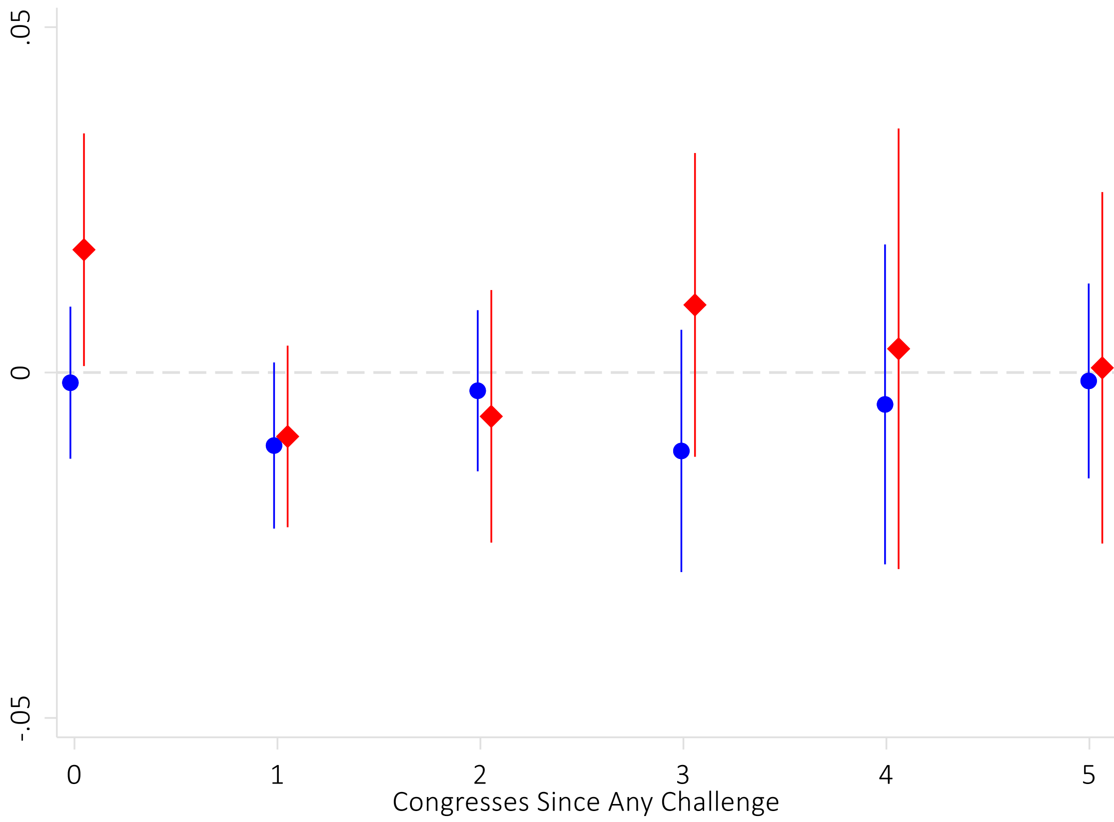


Figure 11.40 Factional Primary: Challenger 5% Threshold

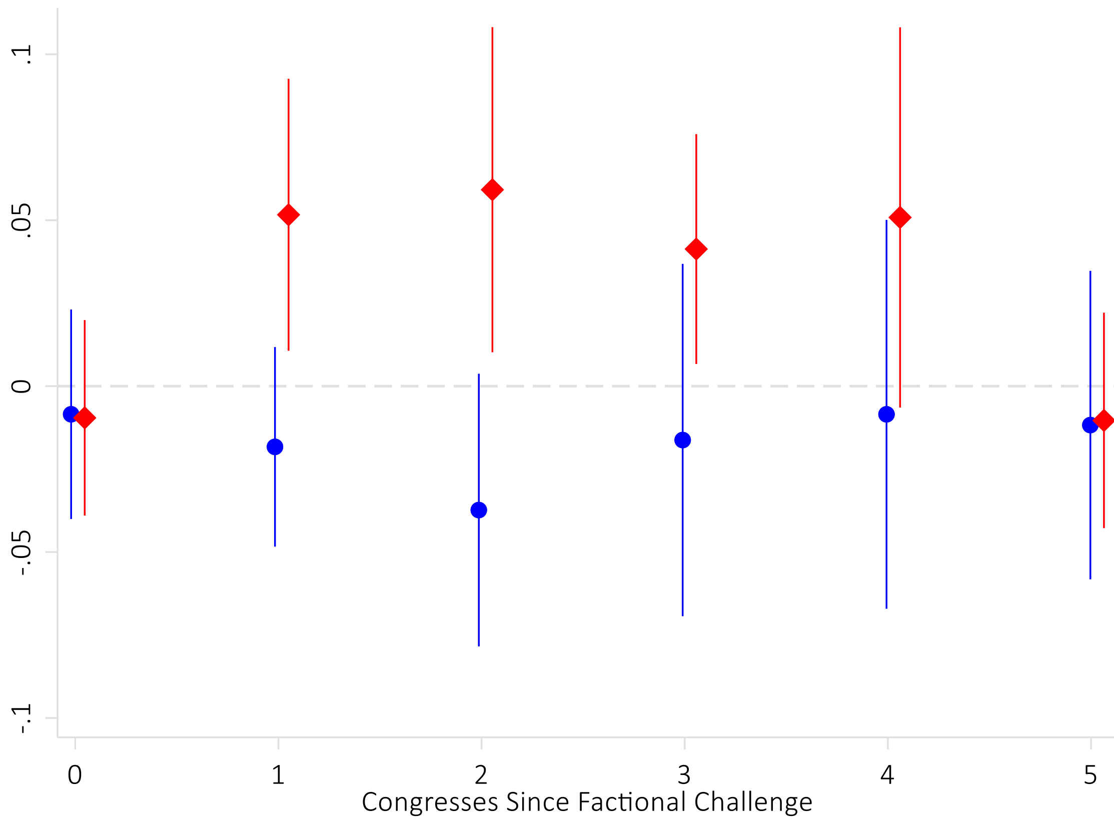


Figure 11.41 Ideological Primary: Challenger 5% Threshold

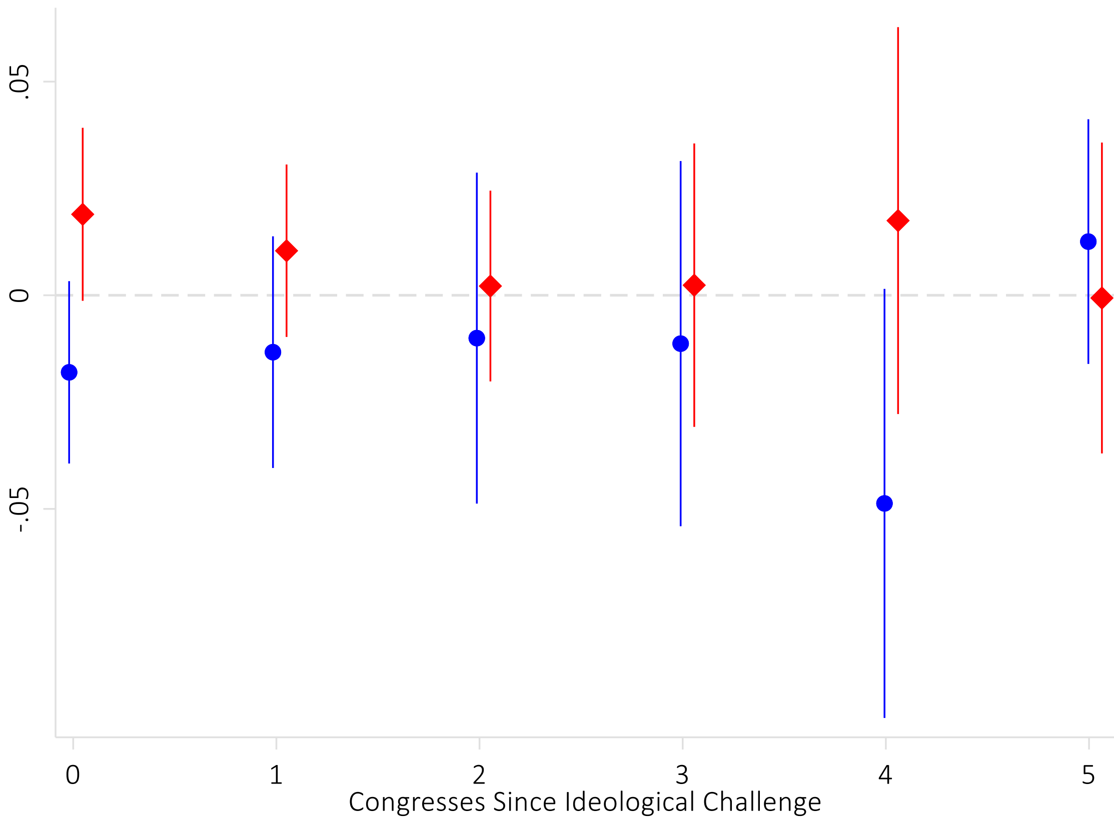


Figure 11.42 Any Primary: Financial Threshold

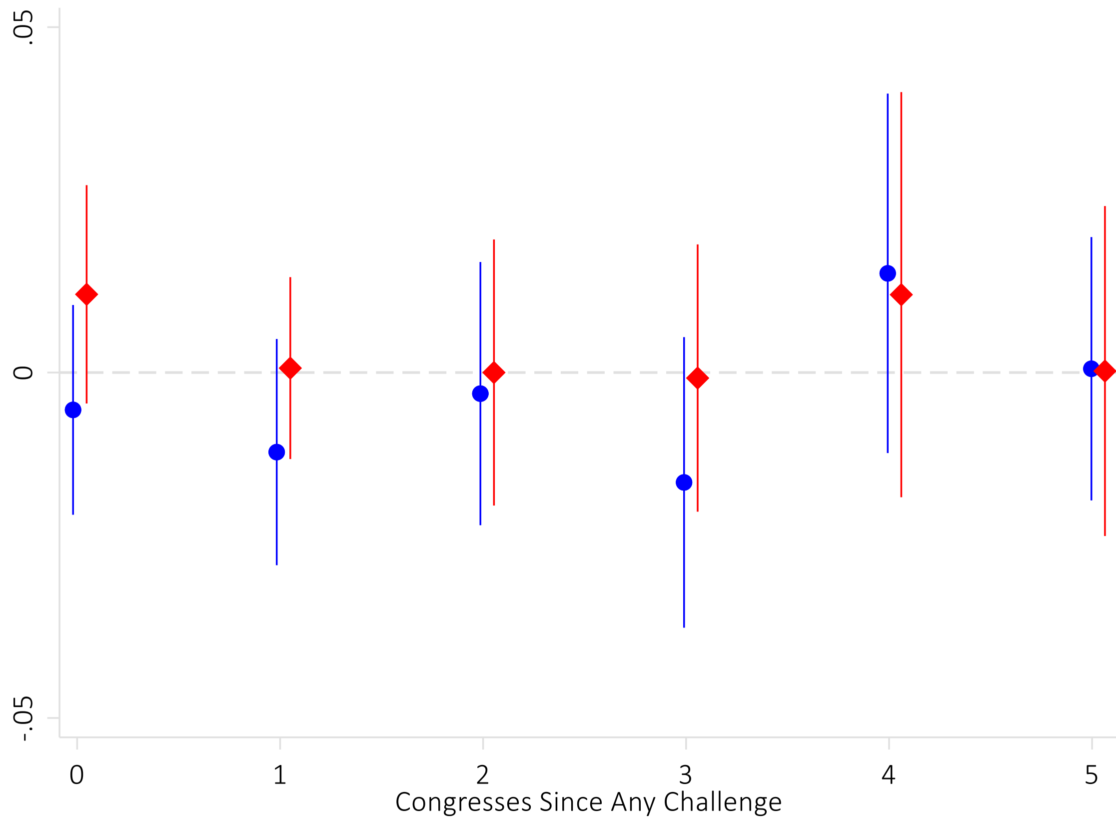


Figure 11.43 Factional Primary: Financial Threshold

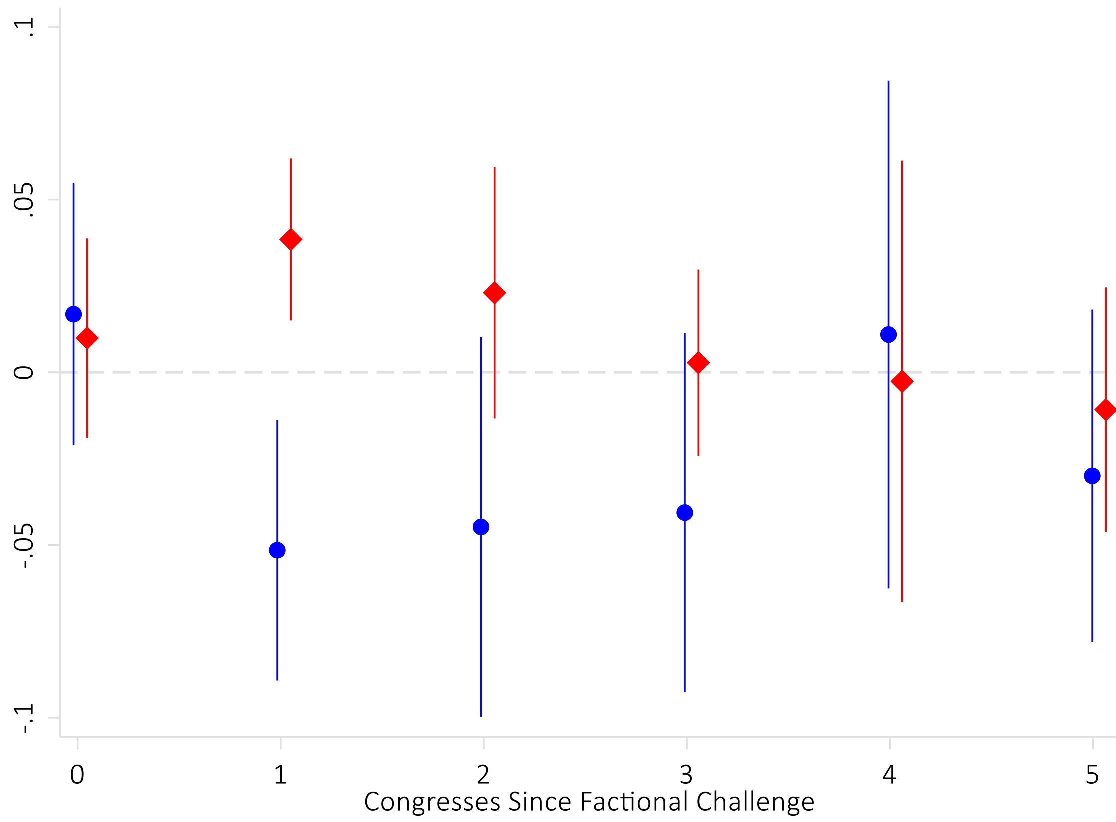
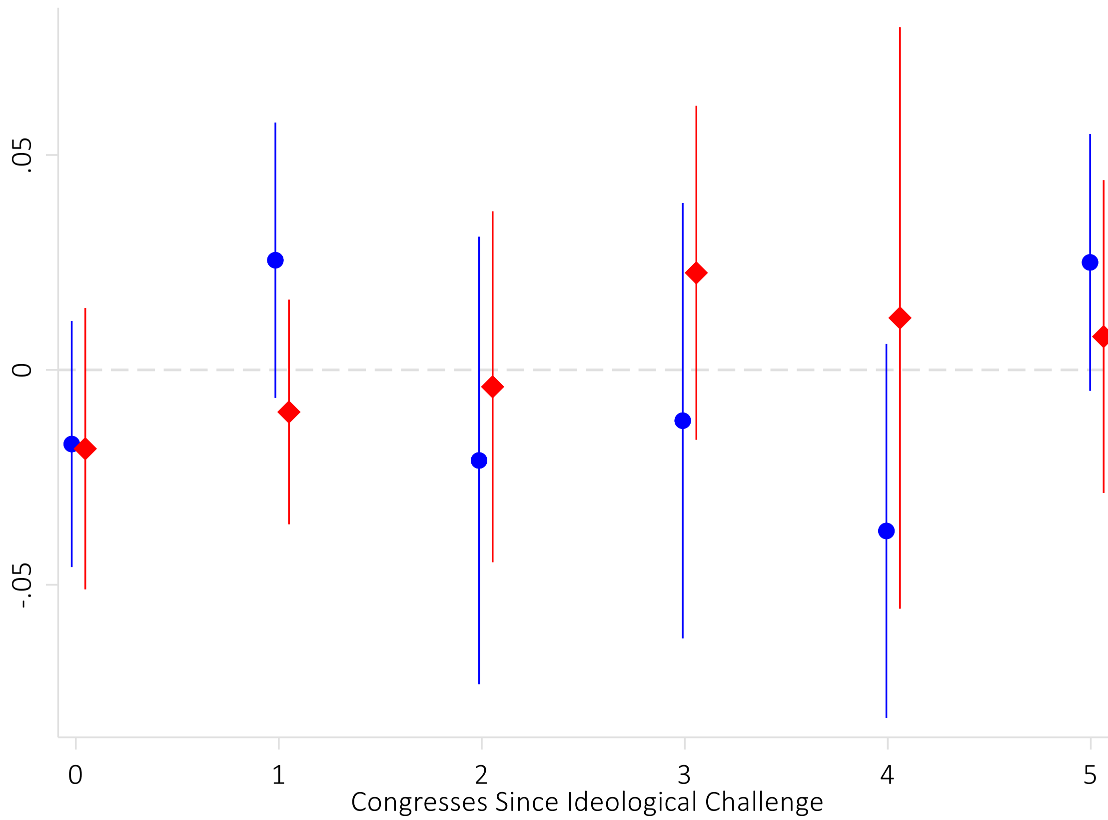


Figure 11.44 Ideological Primary: Financial Threshold



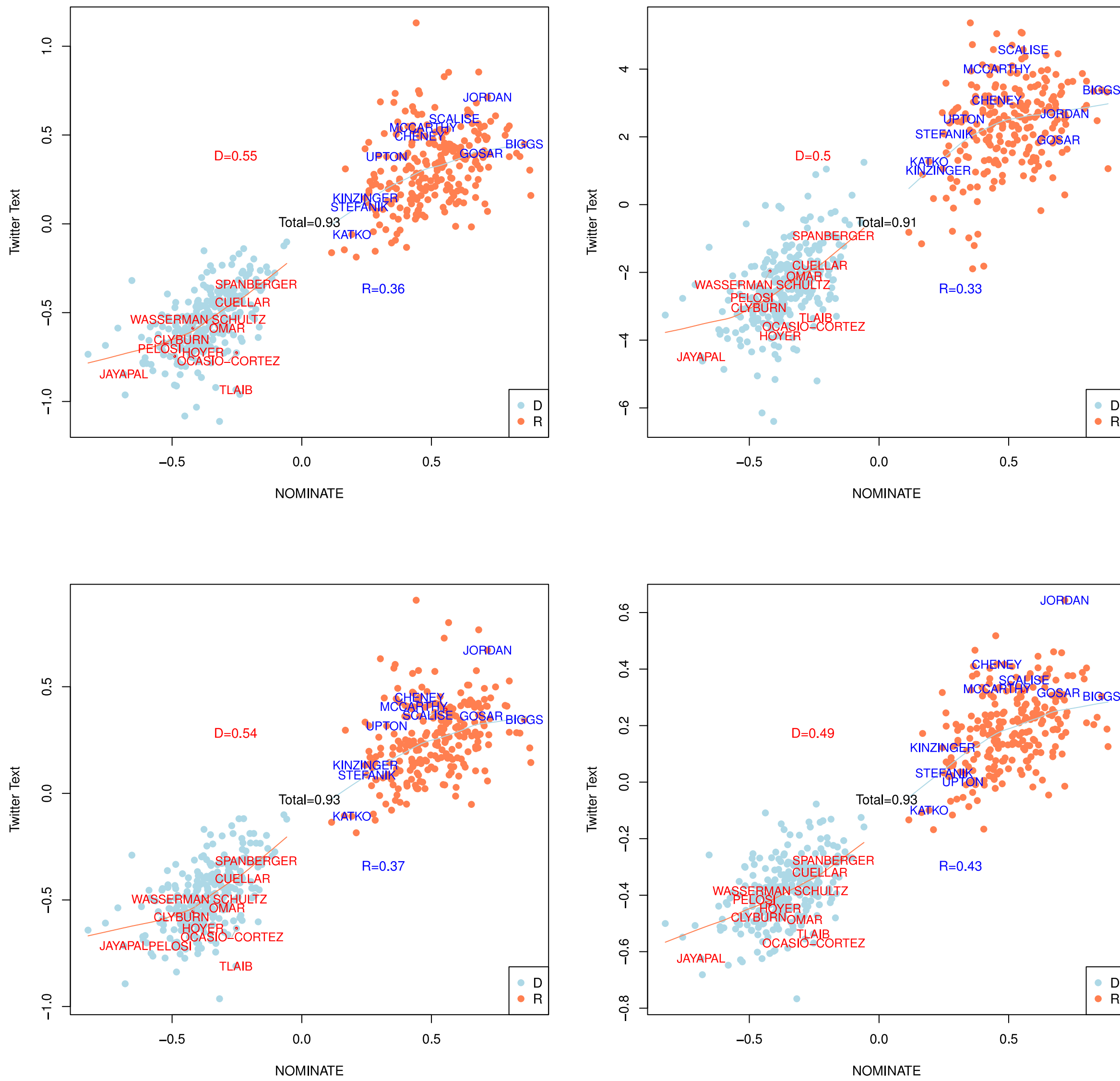
11.6 Chapter Nine

Table 11.88 Descriptive Statistics

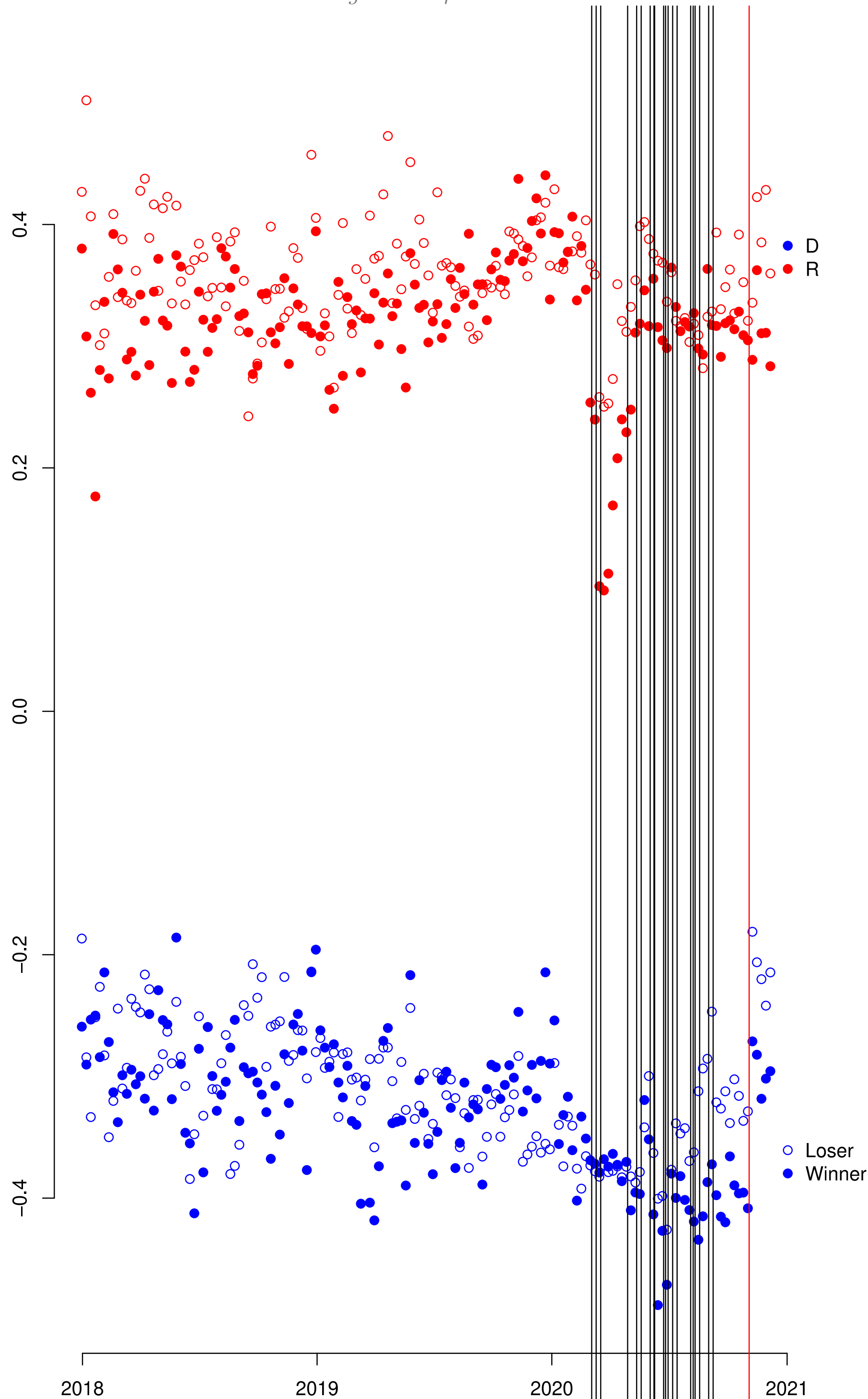
Variable	N	Mean	St. Dev.	Min	25th pct	75th pct	Max
Movement	886	−0.055	0.883	−1	−1	1	1
NOMINATE	283	0.016	0.454	−0.747	−0.396	0.460	0.883
Position Before	886	−0.083	0.320	−0.862	−0.363	0.200	0.761
Position After	886	−0.102	0.305	−0.864	−0.366	0.158	1.395
Candidates (Contested)	1772	3.481	2.350	2.000	2.000	5.000	19.000

Positional scaling often depends on the exact choice of specification. I remove all Twitter-specific references, hashtags, and @-mentions, from the data. Figure 11.45 shows the correlation with NOMINATE for all terms (top-left), only @-mentions (top-right), hashtags but no @-mentions (bottom-left), and only plain text (bottom-right). I use only plain terms in the main analysis (see Figure 9.2) as they are most balanced between Republicans and Democrats in terms of intra-party correlations and have the most semantic validation in terms of the positions of individual representatives.

Figure 11.45 Comparative Validity of Alternative Measures

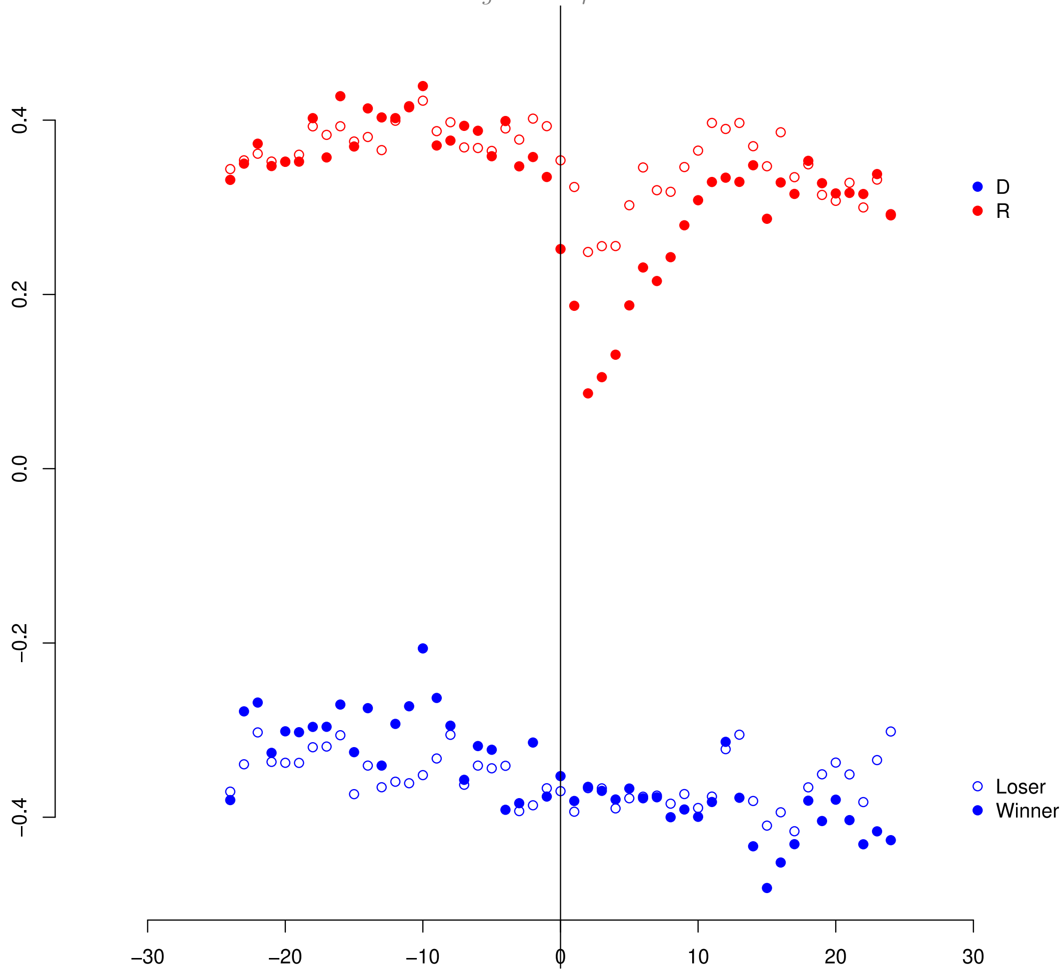


The unusual political climate in the summer of 2020 may affect the generalizability of these findings. In Figure 11.46 I plot the main figure using the true calendar date rather than the 'time-to-primary' variable I use elsewhere. This figure shows that the murder of George Floyd (25th May 2020) and the subsequent national protests, which were at their height between 26th May and 9th June, do not appear to have changed the positioning of candidates in either party in real time. Given that ten of the forty-nine states' primaries took place prior to 25th May, with no difference in the behavior of candidates in these contests compared to the twelve states which had their primaries shortly after this date or compared to the twenty-seven states who held their primaries later in the summer, these findings are not affected by these events.



As an additional check for the causal interpretation of this analysis, I run a placebo test. Figure 11.47 shows the positions of winning and losing primary candidates by party over time. Instead of using the real time-to-primary variable, I randomize the primary date for each candidate from all real primary dates and aggregated the positions over week to these fictitious primaries. If there was a confounder correlated with the primary date, it would still systematically affect the dependent variable over time rather than at the date of the primary. Since I only randomize across nineteen weeks in total (weeks that had primary elections), there is still a relevant time trend in the data.

Figure 11.47 Placebo Test



As the plot demonstrates, the main effect for Democratic candidates is no longer present and only emerges once all primaries have concluded, indicating that indeed primaries cause this movement. We do not see this for the Republicans. In other words, if I set new primaries dates for each Republican candidate, we would still observe the same overall behavior. This is *not* the case for the Democrats.

I also run the ITS model for Democrats using a randomized primary date at the candidate level. I present the results in Table 11.89. As expected, when the primary date is randomized, there is no significant effect (ZX_t).

Table 11.89 ITS Results: Placebo Dates

	Democratic
Time (T_t)	–0.002***
	(0.001)
Post-Pseudo Primary (X_t)	–0.029
	(0.018)
Post-Pseudo Primary # Time ($X_t T_t$)	–0.000
	(0.001)
Loser (Z)	–0.027
	(0.018)
Loser # Time (ZT_t)	0.001
	(0.001)
Loser # Post-Pseudo Primary (ZX_t)	–0.000
	(0.001)
Loser # Post-Pseudo Primary # Time ($ZX_t T_t$)	0.003*
	(0.002)
Constant	–0.337***
	(0.012)
Observations	98
R^2	0.549
Adjusted R^2	0.514
Residual Std. Error (df = 94)	0.032
F Statistic (df = 7;94)	15.628***

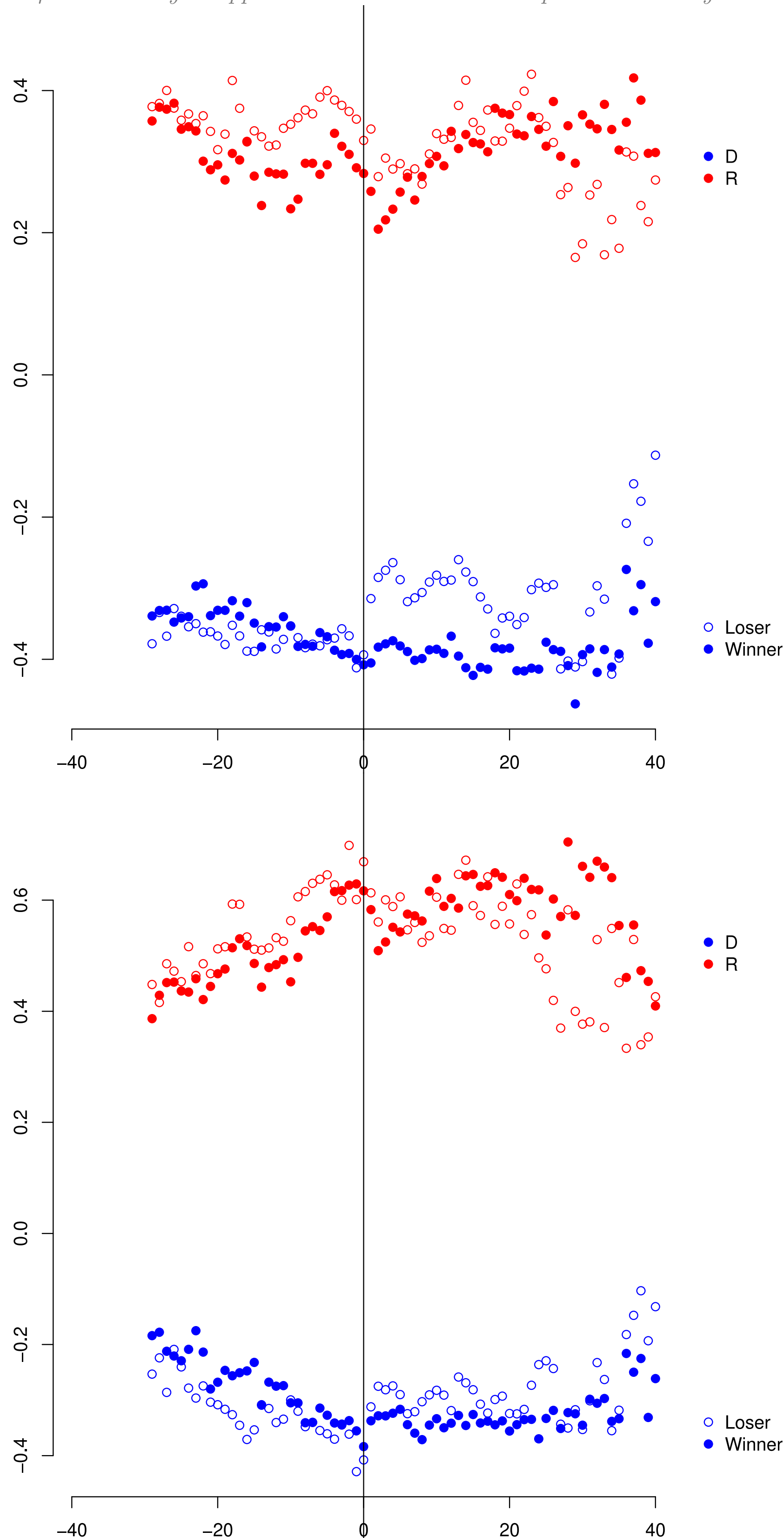
Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

Time-series analysis of political positions has numerous challenges, the most severe of which is the effect of changing saliency that might introduce exogenous shocks into the data. Because many candidates use Twitter to respond to events and current developments, convergence may result from the whole 'system' (all candidates) moving and tweeting about the same issues. As I measure the relative emphasis of specific terms, systemic movement can be problematic, with issues varying in prevalence over time. As an example, healthcare is more commonly emphasized by Democratic candidates, but as discussed above, the COVID-19 pandemic also led to Republicans emphasizing this traditionally 'Democratic' issue.

To tackle this problem, I 'detrend' the data, using canonical correspondence analysis to control for time effects. The common use of correspondence or factor analysis is to extract values for the main dimension, controlling for additional variables and implicitly computing positions of third variables extracted from word weights. By using time as an explanatory variable, we only observe differences in emphasis. If the saliency of an issue rises collectively, I put less weight on it. This process of 'detrending' provides more consistent positions and removes time trends from the data, where the model subtracts the time-based component from the word weight (Greenacre 2007). Figure 11.48 compares approaches, where the upper plot shows the Naïve Bayes approach used in the main analysis, and the lower uses the Canonical Correspondence Analysis discussed here. These effects are substantively the same, with the additional caveat that the detrending produces stronger time effects for the Republicans.

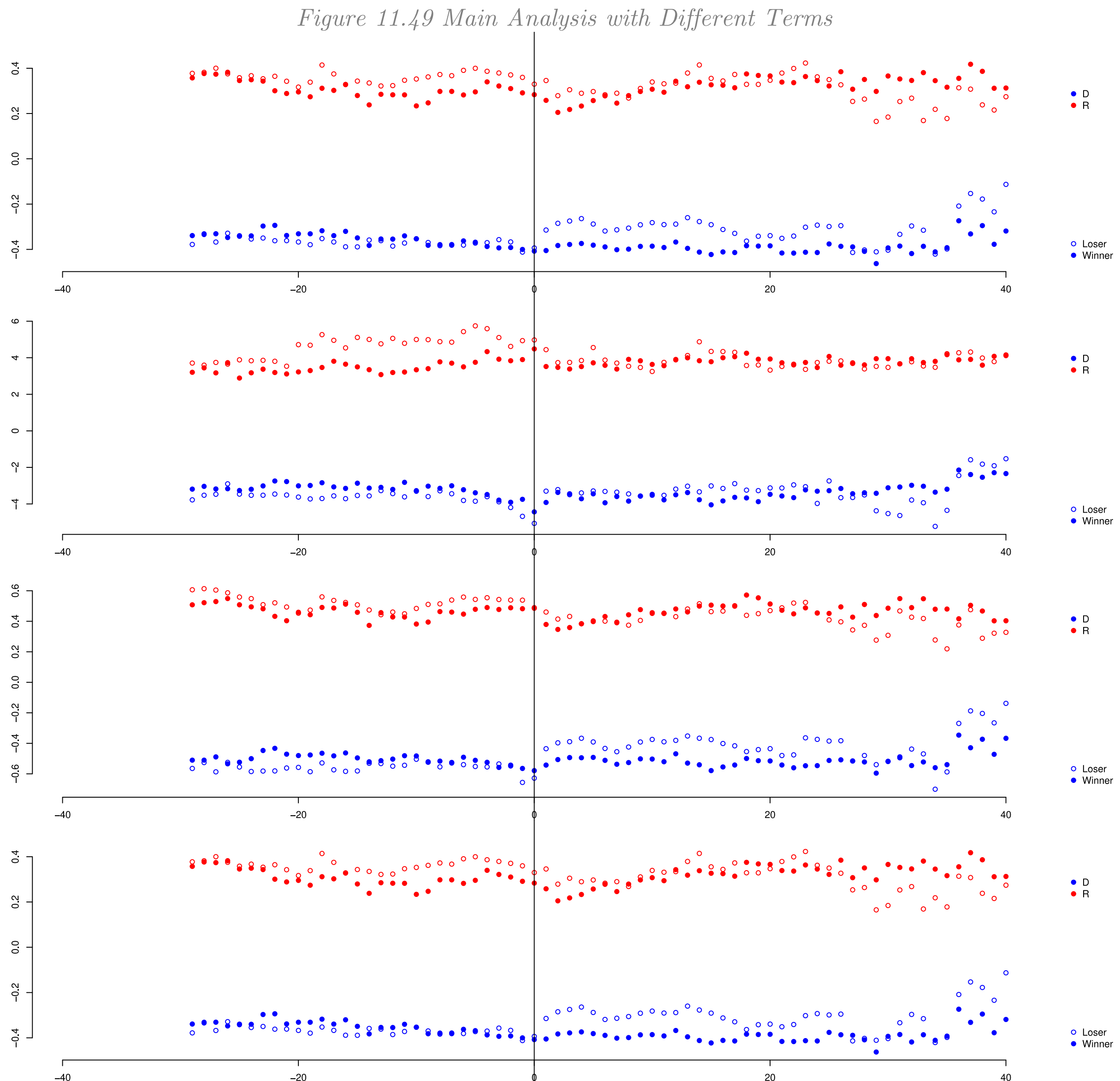
In combination with the placebo test, I conclude that the COVID-19 pandemic affected the political positions of the Republicans, as healthcare, typically a Democratic issue, made the agenda. Before Republicans formulated their own framing, they used similar language to Democrats. This effect leads to a strong time-based overlay in the data that cannot be eliminated at this point, but which requires additional data from future elections.

Figure 11.48 Naïve Bayes Approach & Canonical Correspondence Analysis Comparison



I further demonstrate the robustness to over-time trends by showing that the approach is not affected by the choice of which terms to include in the analysis in Figure 11.49. When I include all terms (first plot), hashtags (third plot), and hashtags and @-mentions (fourth plot), the results remain present. Only if I restrict the data to @-mentions (second plot) is the effect no longer present.

Figure 11.49 Main Analysis with Different Terms



In Table 11.90, I repeat the individual-level analysis with the removal of candidates in the eight districts that saw same-party (all Democrat vs Democrat) general elections because of California and Washington's top-two primary systems. Those districts were CA-12, CA-18, CA-29, CA-34, CA- 38, CA-44, CA-53, and WA-10. The results are substantively unchanged with the removal of these districts.

Table 11.90 Original Analysis & Removal of Same-Party Districts

	Main Analysis	Without Same Party
Loser	0.057***	0.056***
	(0.014)	(0.014)
Republican	–0.079***	–0.079***
	(0.014)	(0.015)
Republican # Loser	–0.043**	–0.041**
	(0.020)	(0.020)
Constant	0.038***	0.039***
	(0.012)	(0.010)
Observations (Candidates)	886	871
R^2	0.052	0.052
Adjusted R^2	0.049	0.049
Residual Std. Error	0.049 (df = 882)	0.049 (df = 867)
F Statistic	16.088*** (df = 3; 882)	16.088*** (df = 3; 867)

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

In Table 11.91, I demonstrate the robustness of the main individual results to three standard errors of movement.

Table 11.91 Individual Level Results (as Coefficient Plot)

	Democrats Absolute	Democrats Three Errors	Republicans Absolute	Republicans Three Errors
Loser	–0.001	–0.007	–0.008***	–0.029***
	(0.001)	(0.008)	(0.002)	(0.010)
District PVI	–0.041***	–0.284***	0.013	0.086
	(0.012)	(0.087)	(0.023)	(0.097)
Incumbent	0.042**	0.277**	–0.031**	–0.080
	(0.007)	(0.051)	(0.013)	(0.057)
Constant	0.039***	0.315***	0.021	0.152*
	(0.011)	(0.079)	(0.020)	(0.083)
Observations	472	472	414	414
R^2	0.094	0.099	0.033	0.025
Adjusted R^2	0.089	0.094	0.026	0.018
Residual Std. Error	0.102 (df = 468)	0.742 (df = 428)	0.184 (df = 410)	0.784 (df = 410)
F Statistic	16.272*** (df = 3; 468)	17.209*** (df = 3; 468)	4.623*** (df = 3; 410)	3.523** (df = 3; 410)

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

In Table 11.92, I demonstrate the robustness of the individual results with the removal of the additional controls in the main analysis.

Table 11.92 Individual Robustness without Controls

	Absolute (No Controls)	Three Errors (No Controls)	Absolute (w/Controls)	Three Errors (w/Controls)
Loser	0.057***	0.438***	0.043***	0.371***
	(0.014)	(0.071)	(0.015)	(0.076)
Republican	–0.079***	–0.359**	–0.073***	–0.336***
	(0.014)	(0.075)	(0.014)	(0.075)
District PVI	-	-	–0.003***	–0.010*
			(0.001)	(0.006)
Incumbent	-	-	–0.028**	–0.145***
			(0.012)	(0.061)
Loser # Republican	–0.043***	–0.324***	–0.037*	–0.298***
	(0.020)	(0.104)	(0.020)	(0.104)
Constant	0.038***	0.252***	0.040***	0.262***
	(0.010)	(0.053)	(0.010)	(0.053)
Observations	886	886	886	886
R^2	0.052	0.056	0.066	0.064
Adjusted R^2	0.049	0.053	0.061	0.059
Residual Std. Error	0.148 (df = 882)	0.769 (df = 882)	0.147 (df = 880)	0.766 (df = 880)
F Statistic	16.088*** (df = 3; 882)	17.349*** (df = 3; 882)	12.407*** (df = 5; 880)	12.104** (df = 5; 880)

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

As an additional check on the approach of running the analysis on the subset of political tweets, I also run a separate analysis on the entire corpus with a control for political tweets. I present the results in Table 11.93. As with the other robustness checks, the main finding that Democratic losers moderate remains substantively significant

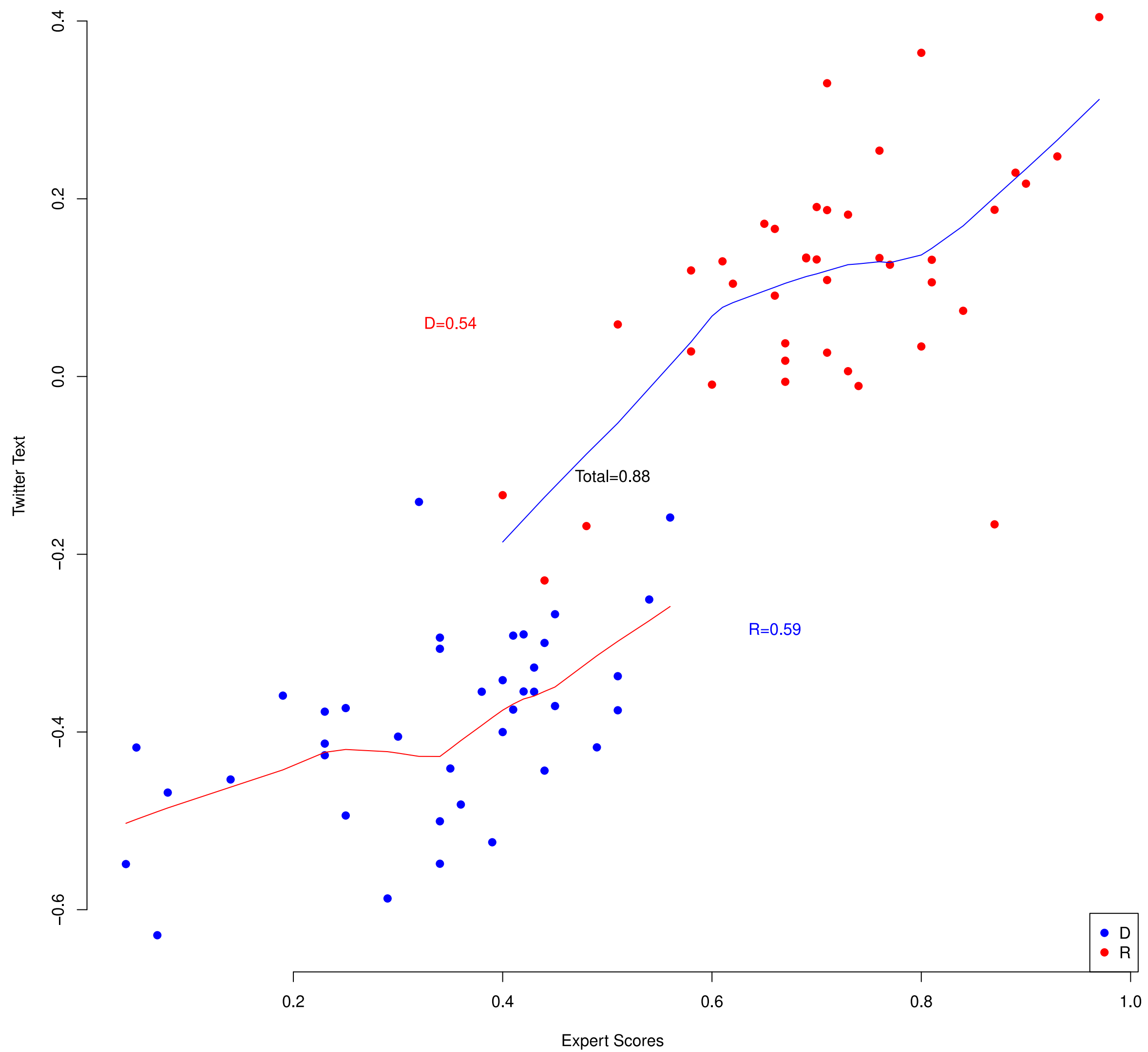
Table 11.93 ITS Results: Controlling for Political Tweets

	Democratic	Republican
Time (T_t)	–0.003***	–0.001***
	(0.001)	(0.001)
Post-Primary (X_t)	0.020*	–0.040***
	(0.011)	(0.015)
Post-Primary # Time ($X_t T_t$)	–0.000*	–0.000
	(0.000)	(0.000)
Loser (Z)	0.024***	0.057***
	(0.009)	(0.018)
Loser # Time (ZT_t)	0.002***	0.000
	(0.001)	(0.001)
Loser # Post-Primary (ZX_t)	0.055***	–0.018
	(0.020)	(0.025)
Loser # Post-Primary # Time ($ZX_t T_t$)	0.002***	0.001
	(0.001)	(0.001)
Intercept	–0.003***	–0.003
	(0.001)	(0.002)
Constant	–0.342***	0.211***
	(0.026)	(0.038)
Observations	102	102
R^2	0.851	0.610
Adjusted R^2	0.839	0.576
Residual Std. Error (df = 94)	0.016	0.025
F Statistic (df = 7;94)	66.578***	18.157***

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

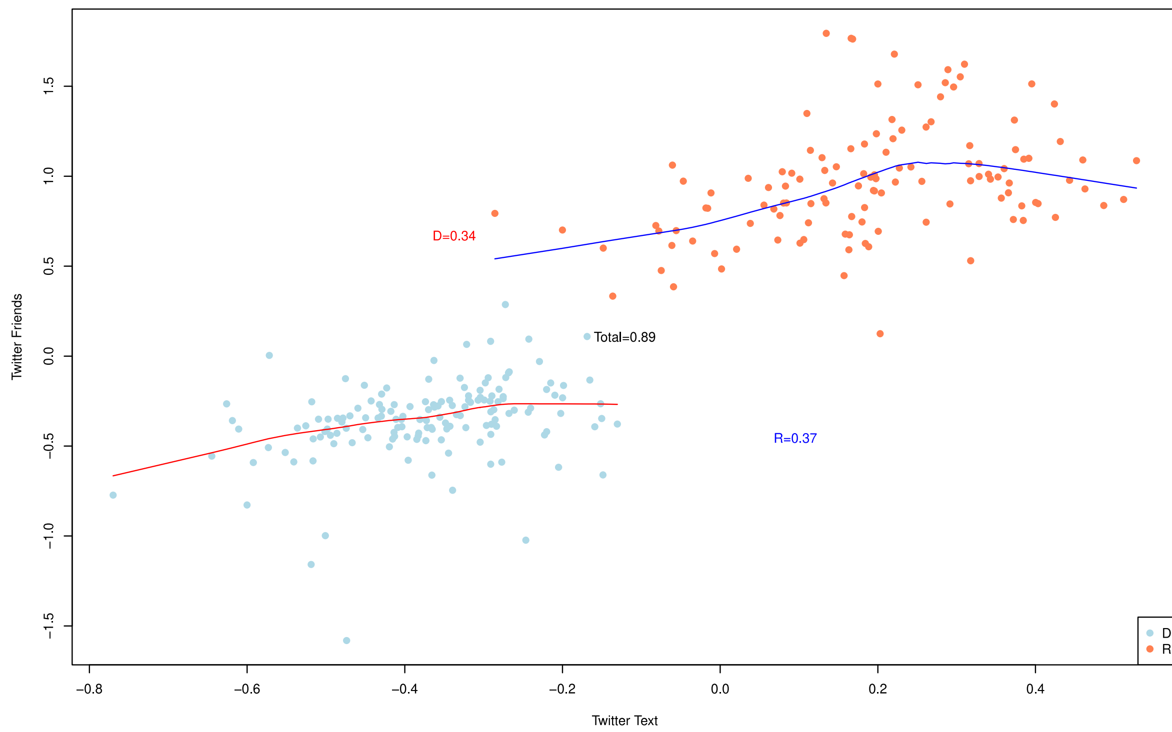
As a further robustness check, I also validate the measure against Hopkins and Noel's (2021) pair-wise activist scores for senators in Figure 11.50. As noted in the main chapter, I do not train the model on senators' tweets, making these tweets an excellent independent corpus against which to validate.

Figure 11.50 Validation Against Hopkins & Noel Pairwise Activist Scores



I also validate against Barberá's (2015) Follower Network in Figure 11.51.

Figure 11.51 Validation Against Barberá's Follower Network



Dataset Codebook

Variable	Definition
`unique_id`	Seven-digit unique identifier made up of PartyYearYearStateStateDistrictDistrict. Democratic = 1, Republican = 2, year codes are last two digits of `year`, state codes are `state_fips`, district codes are `district_number`
`year`	Year of primary contest
`party`	Political party D = Democratic R = Republican
`state`	State name
`state_code`	Two letter state abbreviation
`state_fips`	Two-digit state FIPS code
`district_number`	US Congressional District, Senate contests 99, special Senate 98
`geoid`	`state_fips` * 10 + `district_number`
`panel`	`geoid` plus 0.1 for Democratic primary and 0.2 for Republican primary, used as the panel variable to set the data
`district_pvi`	Cook PVI rating, figures taken from: https://cookpolitical.com/pvi-0
`relative_pvi`	Rescaled version of `district_pvi` relative to the party, where a D+5 district would take the value 5 for the Democratic primary and -5 for the Republican primary.
`white_pct`	Percentage of white citizens in the district, data from US Census ACS website: https://www.census.gov/programs-surveys/acs
`median_income`	District median income, data from US Census ACS website: https://www.census.gov/programs-surveys/acs
`presidential_vote`	Party's most recent presidential vote share in the district
`primary_type`	Signifies whether the incumbent is standing in the primary or if no primary taking place. Incumbent = current office holder running in the contest, Incumbent^ = Incumbent defeated in the primary, Challenger = current office holder standing for alternative party, Open = current office holder not running, None = no primary contest taking place
`factional_primary`	Signifies whether the two highest placing candidates are proximate to different factions, 1 = different ideological factions against each other, 0 = non-factional contest, blank = no contest. See Table 3.3 for decision rule.
`ideology_primary`	Signifies whether the reason for contest is coded as "Ideology", "Ideology-I", or "Ideology-C". Takes the value 1 if yes, 0 if no, blank if uncontested. See Table 3.4 for decision rule.
`polarized_primary`	Signifies whether the two highest placing candidates are both proximate to the realigner faction, 1 = two realigner candidates, 0 = any other contest, blank = no contest.
`reason_for_contest`	Main reason for primary contest taking place, metric of analysis originally developed by Robert Boatright (2013) independently applied to this data set by Mike Cowburn. See Table 3.4 for decision rule.
`primary_turnout`	Number of voters in the primary contest, figures from FEC website: https://www.fec.gov/introduction-campaign-finance/election-and-voting-information/
`voting_age_pop`	Voting age population (VAP) of district, data from US Census ACS website: https://www.census.gov/programs-surveys/acs
`primary_turnout_pct`	`primary_turnout / voting_age_pop`
`pres_consecutive`	Presidential primary held on the same day? Takes the value 1 if yes, 0 if no. All midterm elections take the value 0.
`fractionalization`	Standard measure of primary competitiveness: $F = 1 - \Sigma[(C_1)^2 + (C_2)^2 + (C_3)^2 + (C_3)^2 + (C_4)^2 ...]$
`primary_candidates`	Number of primary candidates on the ballot.

winner_name	Name of candidate who wins the primary.
winner_icpsr	ICPSR code for candidate who wins the primary.
winner_gender	Gender of candidate who wins the primary.
winner_cfscore	CFscore of candidate who wins the primary. Data from Adam Bonica's Database on Ideology, Money in Politics, and Elections (DIME) https://data.stanford.edu/dime
winner_dwn	DW-NOMINATE score of the candidate who wins the primary. Data from www.voteview.com
winner_nokkenpoole	One-Congress-at-a-time-NOMINATE (Nokken Poole score) for the forthcoming Congress of candidate who wins the primary. Data from www.voteview.com
winner_p	Percentage primary vote share of the candidate who wins the primary, figures from FEC website: https://www.fec.gov/introduction-campaign-finance/election-and-voting-information/
winner_g	Percentage general election vote share of the candidate who wins the primary, figures from FEC website: https://www.fec.gov/introduction-campaign-finance/election-and-voting-information/
won_general	Dichotomous variable that takes the value 1 if the primary winner won the general election, 0 if the primary winner lost the general election, blank = no candidate. Data from www.fec.gov/introduction-campaign-finance/election-and-voting-information/
winner_ge_votes	Total number of votes for primary winner in the general election. Data from www.fec.gov/introduction-campaign-finance/election-and-voting-information/
general_turnout	Total turnout in general election. Data from www.fec.gov/introduction-campaign-finance/election-and-voting-information/
winner_fec_id	FEC ID for primary winner.
winner_receipts	Primary winner receipts, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
winner_individuals	Primary winner individual receipts, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
winner_pacs	Primary winner PAC receipts, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
winner_self	Primary winner self-financed receipts, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
winner_disbursement	Primary winner disbursement, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
winner_faction	Primary winner proximity to factional ideal types, assigned by Mike Cowburn. See Table 3.3 for decision rule.
winner_quality	Primary winner 'quality' code of having held previous elected office. In line with Jacobson (1978), coded by Mike Cowburn using Ballotpedia and VoteSmart websites.
winner_extr1	Primary winner relative CFscore vs. party median for that year.
winner_extr2	Primary winner relative CFscore vs. second in the primary.
second_name	Name of candidate who placed second in the primary.

second_gender	Gender of candidate who placed second in the primary.
second_cfscore	CFscore of candidate who placed second in the primary. Data from Adam Bonica's Database on Ideology, Money in Politics, and Elections (DIME) https://data.stanford.edu/dime
second_dwn	DW-NOMINATE score of the candidate who placed second in the primary. Data from www.voteview.com
second_nokkenpoole	One-Congress-at-a-time-NOMINATE (Nokken Poole score) for the forthcoming Congress of candidate who placed second in the primary. Data from www.voteview.com
second_p	Percentage primary vote share of the candidate who placed second in the primary, figures from FEC website: https://www.fec.gov/introduction-campaign-finance/election-and-voting-information/
second_fec_id	FEC ID for candidate who placed second in the primary.
second_receipts	Primary second receipts, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
second_individuals	Primary second individual receipts, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
second_pacs	Primary second PAC receipts, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
second_self	Primary second self-financed receipts, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
second_disbursement	Primary second disbursement, as per FEC 12P pre-primary filing: https://www.fec.gov/data/reports/house-senate/?data_type=processed&amendment_indicator=N&report_type=12P
second_faction	Primary second proximity to factional ideal types, assigned by Mike Cowburn. See Table 3.3 for decision rule.
second_quality	Primary second 'quality' code of having held previous elected office. In line with Jacobson (1978), coded by Mike Cowburn using Ballotpedia and VoteSmart websites.
third_pct	Third placed candidate primary vote share, used only to calculate fractionalization
fourth_pct	Fourth placed candidate primary vote share, used only to calculate fractionalization
fifth_pct	Fifth placed candidate primary vote share, used only to calculate fractionalization
sixth_pct	Sixth placed candidate primary vote share, used only to calculate fractionalization
seventh_pct	Seventh placed candidate primary vote share, used only to calculate fractionalization
eighth_pct	Eighth placed candidate primary vote share, used only to calculate fractionalization
ninth_pct	Ninth placed candidate primary vote share, used only to calculate fractionalization
tenth_pct	Tenth placed candidate primary vote share, used only to calculate fractionalization
eleventh_pct	Eleventh placed candidate primary vote share, used only to calculate fractionalization
twelfth_pct	Twelfth placed candidate primary vote share, used only to calculate

	fractionalization
thirteenth_pct	Thirteenth placed candidate primary vote share, used only to calculate fractionalization
fourteenth_pct	Fourteenth placed candidate primary vote share, used only to calculate fractionalization
fifteenth_pct	Fifteenth placed candidate primary vote share, used only to calculate fractionalization
sixteenth_pct	Sixteenth placed candidate primary vote share, used only to calculate fractionalization
seventeenth_pct	Seventeenth placed candidate primary vote share, used only to calculate fractionalization
eighteenth_pct	Eighteenth placed candidate primary vote share, used only to calculate fractionalization
republican	Takes value 1 if Republican, 0 if Democratic.
senate	Take value 1 if Senate, 0 if House.
contested_primary	Takes value 1 if any primary contest, otherwise 0.
notes	Brief note and sources on each primary competition.

List of Previous Works by Author

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