

# Reversion to the Mean, or their Version of the Dream? Latino Voting in an Age of Populism\*

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## Abstract

In 2020, support for Joe Biden among Latina/o/x voters was 8 percentage points lower than support for Hillary Clinton in 2016, the largest drop of any racial/ethnic group. While much media and academic attention has focused on understanding the impact of misinformation, COVID concerns, and racial animus on Latino voters in 2020, we take a step back and clarify the demographic and core ideological characteristics of Latino voters who voted for Donald Trump in 2020. Using a mix of national survey data, precinct returns, and voter file records, we disaggregate components of electoral change. We find evidence of an increasing alignment between Latinos' ideology, issue positions and vote choice. Correspondingly, we observe significant pro-Trump shifts among working-class Latinos and modest evidence of a pro-Trump shift among Latinos closer to the immigration experience. These findings, coupled with an analysis of the 2022 CES, point to a more durable Republican shift than currently assumed.

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# 1 Introduction

Latina/o/x support for Biden in 2020 was 8 percentage points lower than support for Clinton in 2016, the largest drop of any racial/ethnic group.<sup>1</sup> Given the increasing competitiveness of presidential elections, these shifts led pundits and academics to speculate about the causes and consequences of Latinos drifting from the Democratic Party. Though these electoral shifts re-ignited interest in Latino politics, the specter of GOP gains among Latinos has always been present (de la Garza and Cortina 2007).

While many Latinos identify as conservative and vote Republican, a majority of Latinos identify as Democrats. To explain this, existing theory emphasizes a threat-mobilization process, where increasing polarization and extremism on the issue of immigration, owing to growing restrictionism among Republicans, has pushed Latinos toward the Democratic Party (Bowler, Nicholson and Segura 2006; Barreto and Collingwood 2015; Gutierrez et al. 2019). This process is consistent with social identity research, which posits that threat can activate anger and mobilize groups (Mackie, Devos and Smith 2000). Given this, Trump support among Latinos ought to have reached a nadir after four years of immigration restrictionism. Yet, Trump made gains in majority Latino areas across the nation.<sup>2</sup>

Are these rightward shifts durable? On one hand, our evidence shows working-class and ideologically conservative Latinos supported Trump more in 2020, mirroring mass-level increases in educational and ideological polarization (Gethin, Martínez-Toledano and Piketty 2022). This points to lasting shifts in partisan loyalties. On the other hand, while the Latino vote continues to be majority Democratic, historical voting patterns reveal significant ebbs and flows in Republican

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<sup>1</sup>According to Catalist, Biden's 2020 two-way voteshare estimate among Latinos was 63%, whereas Clinton's estimated 2016 two-way voteshare was 71% (<https://catalist.us/wh-national/>).

<sup>2</sup><https://www.nytimes.com/interactive/2020/12/20/us/politics/election-hispanics-asians-voting.html>

support.<sup>3</sup> Therefore, 2020 could be a “reversion to the mean,” with 2016 serving as a high watermark for Democrats.

We unpack the 2020 “Latino shift” by examining the electoral behavior of Latino subgroups. We leverage surveys to show which subgroups contributed *net* votes for Trump in 2020. We also decompose components of change into shifts in turnout, vote choice, and group size using the approach outlined by Grimmer, Marble and Tanigawa-Lau (2022). We find that Trump improved within subgroups already disposed to favor Republicans, indicating a more durable change in Latino voting and suggesting that “identity threat” effects may have been transient (Gutierrez et al. 2019). Specifically, we find a stronger alignment between issue positions and 2020 vote choice, as Trump gained net votes among blocs defined by criminal justice and immigration attitudes, as well as Latinos who describe themselves as very conservative, Catholic, and lower socio-economic status (SES).

These gains are attributable to rightward swings as opposed to (de)mobilization, with the notable exceptions of college-educated Latinos and partisans whose attachments remained stable. Analyzing precinct returns and voterfile data, we see that places with more immigrants and lower SES also shifted rightward. Our findings empirically develop an understanding of contemporary Latino vote shifts, while also theoretically calling into question the durability of threat-mobilization.

## 2 Our Contribution

Evidence exists for both stability and instability in Latino voting (Appendix A.1 provides a literature review). The potential for Republican gains among Latinos has long been recognized (de la Garza and Cortina 2007), but unrealized (Barreto and Collingwood 2015). The 2020 election is theoretically important since a shift toward Trump occurred despite the presence of several conditions that could generate Latino bloc voting (e.g., threat). Latinos are still heavily Democratic-

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<sup>3</sup><https://centerforpolitics.org/crystalball/articles/are-latinos-deserting-the-democratic-party-evidence-from-the-exit-polls/>

leaning, in both party identification and vote choice (Barreto and Segura 2014; Corral and Leal 2020). However, a deeper understanding of who shifted toward Trump may resolve the disconnect between recent political shifts among Latinos and the extant literature.

We seek to answer two key questions related to 2020 Latino voter behavior: First, *which Latinos increased their support for Trump in 2020?* Here we draw on national surveys, precinct-level returns, and voter file data. Second, *will this increase in support transfer to other Republican candidates in the future?* We study the characteristics of Latinos who contributed to Trump’s gains and/or shifted their support to Trump, finding a stronger correspondence between political orientations and vote choice from 2016 to 2020, and observing general stability in 2022.

We divide our analyses into two parts. First, we conduct a decomposition of the net votes Trump gained from Latinos in 2020 relative to 2016. Second, we use a combination of precinct returns and national voter file data to conduct an ecological analysis of areas with a disproportionate “Latino shift.” Though both approaches have limitations, we consider the use of both individual-level and ecological data as necessary, given wide variation in estimates of Latino opinion across different polls.<sup>4</sup> To the extent that we find similar patterns across data sources, we can be more confident in our conclusions.

## 3 Results

### 3.1 Trump gained among low-SES and conservative Latinos

Grimmer, Marble and Tanigawa-Lau (2022) contend that while models focused on changes in vote choice across elections can identify shifts in candidate support, assessing how these shifts are translated into *vote totals* requires a different approach. A bloc’s contribution to election outcomes depends on three components – turnout, vote choice, and composition. Simply knowing if a voting bloc became more likely to vote for a candidate between elections is insufficient for knowing if that

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<sup>4</sup><https://fivethirtyeight.com/features/have-latinos-really-moved-toward-the-republican-party/>

bloc produced a net increase in that candidate’s vote total. As Grimmer, Marble and Tanigawa-Lau (2022) show, one can estimate this “net votes” quantity within a given voting bloc  $x$  using the following equation:

$$\begin{aligned} \text{Diff Net}(x) = \text{Net Trump}_{2020}(x) - \text{Net Trump}_{2016}(x) = \\ \underbrace{(p(\text{Trump} \mid \text{turnout} = 1, x)_{2020} - p(\text{Biden} \mid \text{turnout} = 1, x)_{2020})}_{\text{Vote choice difference (2020)}} \underbrace{p(\text{turnout} = 1 \mid x)_{2020}}_{\text{Turnout rate (2020)}} \underbrace{p(x)_{2020}}_{\text{Composition (2020)}} - \\ \underbrace{(p(\text{Trump} \mid \text{turnout} = 1, x)_{2016} - p(\text{Clinton} \mid \text{turnout} = 1, x)_{2016})}_{\text{Vote choice difference (2016)}} \underbrace{p(\text{turnout} = 1 \mid x)_{2016}}_{\text{Turnout rate (2016)}} \underbrace{p(x)_{2016}}_{\text{Composition (2016)}} \end{aligned} \quad (1)$$

This equation clarifies the necessary components for calculating if a candidate gained votes from a bloc over time. The first component captures the percentage point difference in vote choice between Trump and his Democratic competitor within voting bloc  $x$ , the second component is  $x$ ’s turnout rate, and finally, the third component is the share of the Latino electorate in voting bloc  $x$ . (See Appendix A.2 for further explanation of this decomposition method, and Appendix A.3 for an explanation of the utility of such decomposition for our understanding.)

To better understand the role of different Latino voting blocs in 2020, we estimate Latino-specific survey weights using entropy balancing (Hainmueller 2012) and apply the Grimmer-Marble-Tanigawa-Lau (GMTL) decomposition to key political and demographic subgroups using data from the 2016 and 2020 CES. The principal advantages of the CES are the size of its Latino sample ( $N_{2016} = 7,495$ ;  $N_{2020} = 6,978$ ) and the inclusion of turnout and voter validation data. Given that we aim to make inferences about Latinos, we use entropy balancing to estimate Latino-specific weights using data from the 2016 and 2019 ACS.<sup>5</sup> We assess if Trump observed increases in net votes from 2016 to 2020 among Latino subgroups based on age, sex, income, education, ancestry,

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<sup>5</sup>We generate Latino-specific weights with targets based on key demographics such as age, sex, education, national origin, foreign-born status, and state.

generational status, partisanship, ideology, religion, crime policy attitudes, immigration attitudes, and social media usage. Given inconsistent survey items across CES surveys, item response theory (IRT) was used to place respondents on the same latent scale through the use of common items present in both 2016 and 2020 (see “Additional Study Details” documentation on Dataverse for question wording and scale construction details).

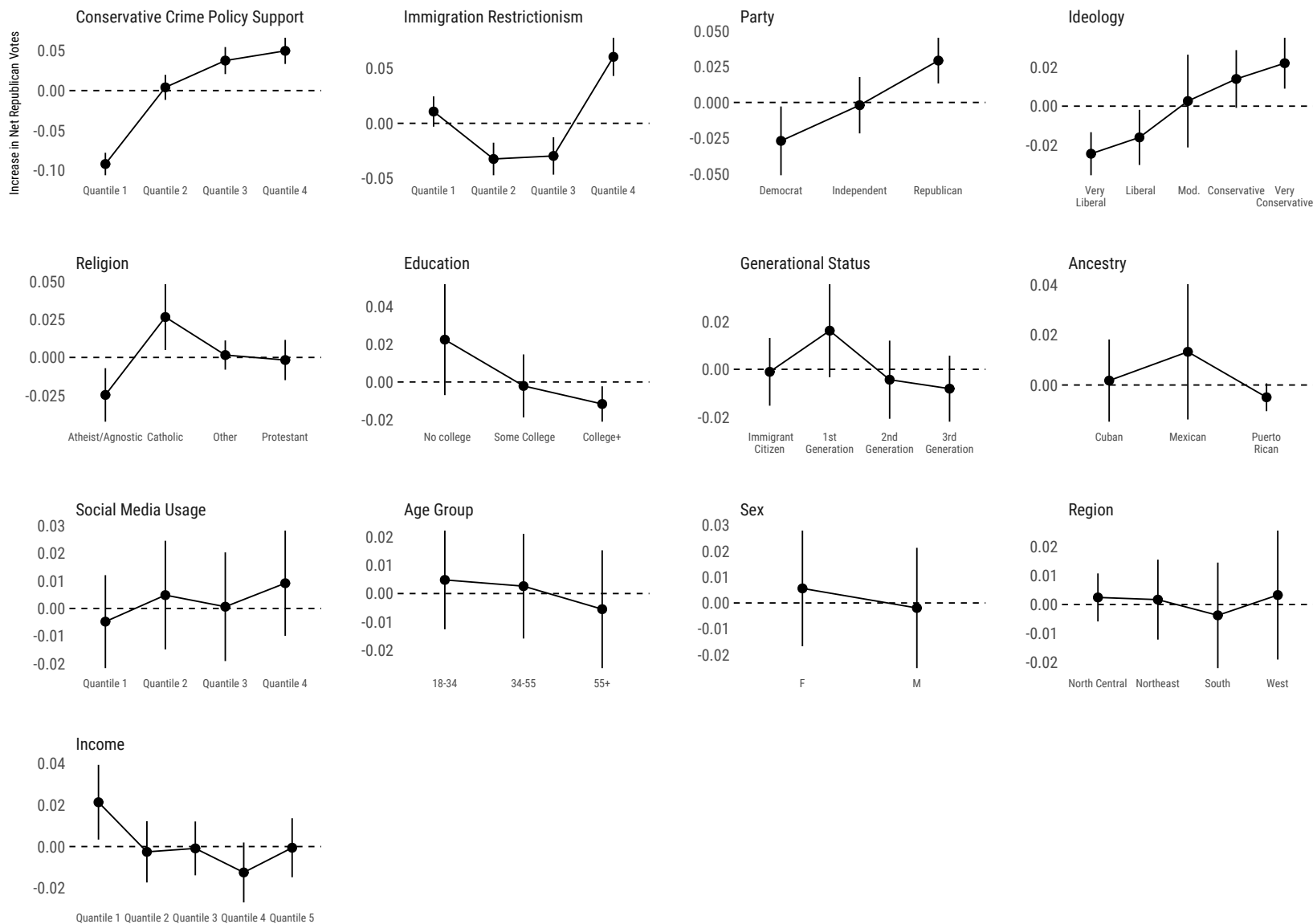
Figure 1 presents estimates of net vote Trump increases from 2016 to 2020 with bootstrapped 95% confidence intervals.<sup>6</sup> Positive estimates indicate shifts in relative Trump support from 2016 to 2020, whereas negative estimates indicate shifts towards Biden. Observable shifts in votes for Trump from 2016 to 2020 were mostly contained within partisan, religious, ideological, and attitudinal voting blocs, such as Catholic, restrictionist, pro-police, partisan, and ideologically conservative Latinos. That is, indicators for alignment with the Republican party most strongly predict Latino vote shifts. This suggests that shifts are sustainable and not necessarily specific to Trump or 2020. We also explicitly examine election-specific effects, such as reactions to COVID-19 and BLM protests and do not find support for these alternative explanations of Latino vote shift (see Appendix A.4-A.5). Our social media analysis presented in the first graph in the 3rd row of Figure 1 also suggests misinformation may have had muted effects on net votes.<sup>7</sup>

Patterns for demographic voting blocs were smaller, with considerable uncertainty in the estimates. Net vote increases of 2pp were observed among the least educated and lowest income quartile. Those with a college degree provided Biden with a net vote increase of approximately 1pp. This is consistent with a shift in the electorate in general, and thus again indicates the rightward shift among Latinos may be sticky. We observe suggestive evidence of a shift towards Trump among first-generation Latinos (i.e., American-born children of immigrants) ( $p = .10$ ). Shifts towards Trump according to age, sex, social media use, ancestry, or geographic region are less discernible.

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<sup>6</sup>See replication materials for full estimates.

<sup>7</sup>This aligns with Velez, Porter and Wood (2023) who find muted effects of misinformation exposure on turnout intention and candidate evaluations.



**Figure 1: Increase in net Republican votes from 2016 to 2020 among different Latino subgroups.** Positive scores indicate that Trump gained votes within a subgroup across elections. Negative scores indicate that Biden gained votes (relative to Clinton) across elections. Estimates are calculated for Latinos only.

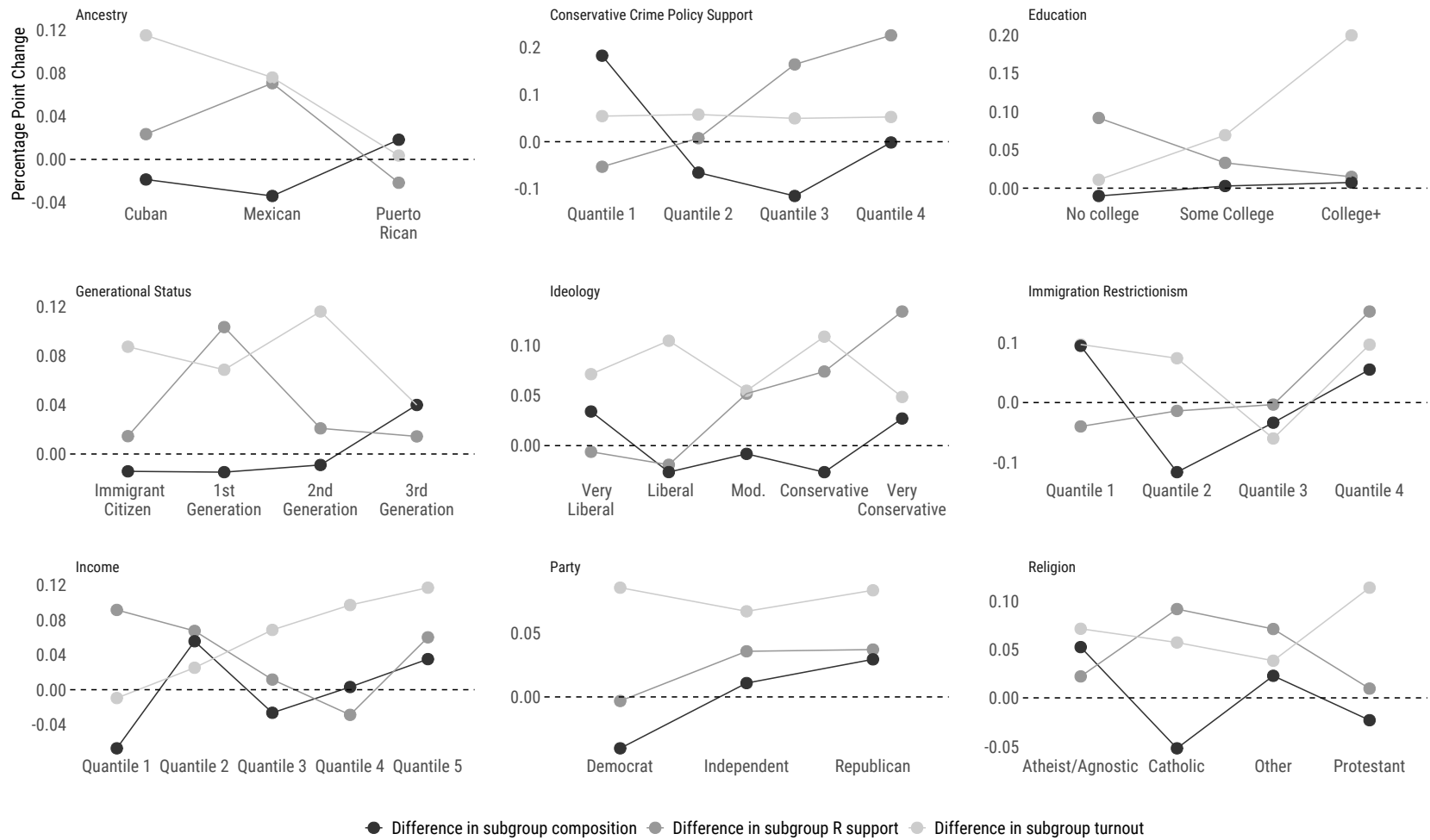


Figure 2: **Decomposition of net votes into changes in turnout rate, composition, and vote choice from 2016 to 2020 for voting blocs demonstrating discernible shifts towards Trump.** Estimates are calculated for Latinos only.



In Figure 2, we display the different components of the “net votes” estimand for the voting blocs that had statistically discernible shifts (see “Additional Study Details” documentation on Dataverse for estimates). The figure displays percentage point changes from 2016-2020 with respect to the different components: turnout rate; Trump support; and group size. The closer the estimate of a component is to zero, the less likely it is to be an explanation for increases in net votes. Positive (negative) estimates for the turnout rate indicate that the voting bloc increased (decreased) its turnout from 2016 to 2020, positive (negative) estimates for the subgroup Republican support measure indicate that the subgroup increased (decreased) its Trump support from 2016 to 2020, and positive (negative) estimates for the composition measure indicate that a group grew (shrank) as a proportion of the electorate.

Shifts in Trump vote choice from 2016 to 2020 help explain net vote increases among voting blocs defined by conservative crime policy attitudes, generational status, and ideology. Turnout increases from 2016 to 2020 appear to be responsible for the net vote increases for Biden among those with a college degree. In other cases, a combination of changes in turnout, Trump vote, and/or composition is responsible for the observable shifts within voting blocs. For example, those scoring at the lower end of immigration restrictionism had a higher turnout rate in 2020 than 2016 *and* increased their support for Biden, but became a smaller proportion of the electorate. Those scoring at the upper end of the scale became more numerous, increased turnout, and increased Trump support in 2020 over 2016. Relative increases in Trump support among first-generation Latinos can be explained by a mixture of increased turnout and increased Trump vote choice, whereas shifts among low-income voters can mostly be attributed to vote choice. Gains among Catholics can be explained by changes in turnout and vote share, whereas gains among atheists/agnostics can mostly be explained by increases in turnout.

We find changes in vote choice among low SES and conservative Latino voting blocs generated increases in net votes for Trump. This dovetails with trends among White voters starting in 2016, and suggests that this rightward 2020 shift among Latinos may stick. In contrast, mobilization among voters with stable voting patterns who were already opposed to Trump (e.g., self-identified

Democrats, liberals, and college-educated voters) contributed to decreases in his vote totals. Our estimates are consistent with ideological sorting, rather than an increase in the share of conservative Latinos. While a threat-mobilization process may have driven opposition to Trump among those already predisposed (e.g., Democrats, college-educated Latinos) (Pantoja and Segura 2003; Gutierrez et al. 2019; Ocampo, Garcia-Rios and Gutierrez 2021), this effect did not extend to more conservative or less politically active Latinos.

### **3.2 Shift to Trump was geographically broad/concentrated in areas with low-SES, newly-activated Latinos**

To further probe Latino voter shifts, we rely on official records of turnout and election results at the sub-county level. We identify the population of 2020 voters using individual-level voter file records from TargetSmart, a vendor that compiles voter registration and vote history data in each state, geocoding registrants' addresses and using a combination of given name, surname, and geographic context to model individual race/ethnicity. We aggregate the number of voters in 2020 by voting behavior in the 2018, 2016, and 2014 elections, along with sums of the modeled probabilities of voter race/ethnicity, to the Census tract level. We reaggregate precinct-level 2016 and 2020 election results produced by the Voting and Election Science Team (Voting and Team 2018, 2020) to the 2010 Census tract level, merging the resultant election results with the voterfile-derived turnout totals.

Figure 3 indicates the increase or decrease in Trump's two-party 2020 voteshare as compared to the 2016 election at the Census-tract level. There are broad *gains* in Trump voteshare in neighborhoods with substantial numbers of Latino voters. Here the trend is monotonically rising from 25% Latino onward, with an 80% Latino tract seeing a roughly 15pp increase in Trump two-party voteshare between 2016-2020. In Appendix A.7, we show that these gains can be observed even outside Florida and Texas.

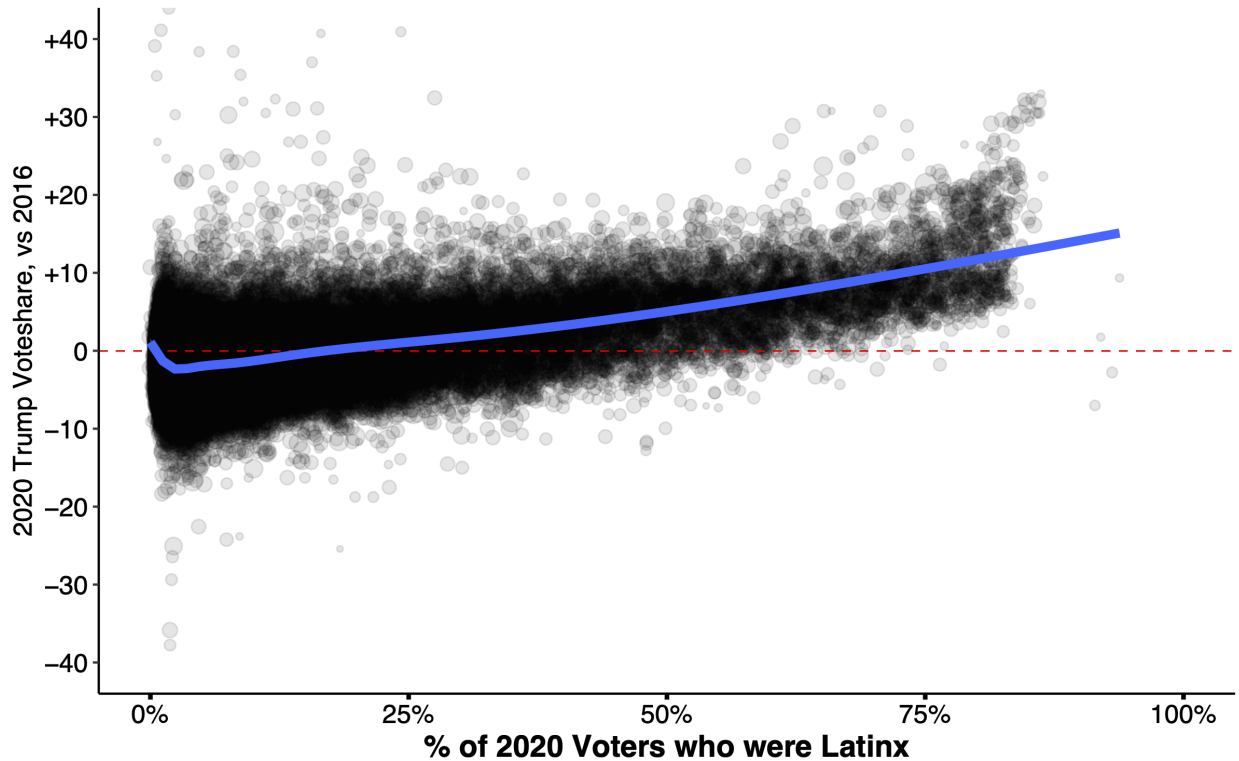


Figure 3: **Census Tract-level Trump 2020 Voteshare - Trump 2016 Voteshare as a function of % Latino Voters.** Blue line represents a loess smoother. Red dashed line indicates 0 change in Trump two-party vote between 2016 and 2020.

Which factors predict increased Trump voteshare in the voterfile data? Table 1 presents estimates from a weighted linear regression on the Census-tract level election and turnout data.<sup>8</sup> The dependent variable is the 2020 Trump share of the two-party vote, and % Latino is the modeled share of tract voters in 2020 who were Latino. Model 1 indicates a linear *decrease* in Trump support as the share of Latino voters increases. That is, at baseline, Democrats perform better than Republicans in heavily-Latino areas. However, once we control for Trump’s voteshare in 2016 at the tract level (Model 2), the relationship reverses and the percent of voters who are Latino in a Census

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<sup>8</sup>The regression analyses only include tracts where Latinos constitute at least 5% of 2020 voters due to a lack of Census data on Latino characteristics in areas with few Latinos. Substantive findings do not change when using the full sample. Observations are weighted by the number of 2016 voters in the tract.

	(1)	(2)	(3)	(4)	(5)	(6)
% Latino Voters (2020)	-0.247*** (0.007)	0.129*** (0.001)	0.130*** (0.001)	0.123*** (0.002)	0.123*** (0.001)	0.117*** (0.002)
Trump Voteshare (2016)		0.908*** (0.001)	0.908*** (0.001)	0.907*** (0.001)	0.915*** (0.001)	0.915*** (0.001)
% New Voters (Among Latinos)			0.031*** (0.003)			0.042*** (0.003)
log(Latino HH Income)				-0.005*** (0.001)		-0.006*** (0.001)
% Non-College (Among Latinos)				0.012*** (0.002)		0.014*** (0.002)
% Immigrant (Among Latinos)					0.004 (0.003)	0.003 (0.003)
% Latino Immigrants Naturalized					-0.010*** (0.001)	-0.007*** (0.002)
% Native-Born Latinos LEP					0.033*** (0.002)	0.025*** (0.003)
% Immigrant $\times$ % Naturalized					0.057*** (0.005)	0.070*** (0.006)
(Intercept)	0.434*** (0.002)	0.011*** (0.001)	-0.012*** (0.002)	0.065*** (0.007)	0.003* (0.001)	0.024** (0.008)
<i>N</i>	23,288	23,288	23,288	19,124	23,288	19,124
<i>R</i> <sup>2</sup>	0.057	0.962	0.962	0.959	0.963	0.961

Table 1: **Census Tract-level regressions predicting Trump 2020 two-party voteshare.** Unit of observation is the 2020 Census tract. Estimates derived using a weighted least-squares model. \*  $p < 0.05$ , \*\*  $p < 0.01$ , \*\*\*  $p < 0.001$

tract positively predicts Trump *gains* in 2020. Model 3 adds a voterfile-derived variable related to previous voting history: the percent of Latino voters in the tract who could have voted prior to the 2020 election,<sup>9</sup> but have no recorded vote history before Trump’s re-election campaign. After controlling for 2016 Trump voteshare, and the overall percent Latino voter in the tract, the percent of Latinos who were first-time voters in 2020 significantly predicts an increase in Trump voteshare. In conjunction with Figure A5, this implies a *newly activated* group of Latino voters produced some of Trump’s raw gains.

<sup>9</sup>This percentage does not count individuals who aged into the electorate between 2016-2020 as “new voters.” These voters who then turned out for the first time in 2020 predicts a slight decrease in 2020 Trump support, after controlling for 2016 Trump voteshare.

Leveraging the Census tract-level aggregated data, Table 1 Models 4-6 add estimates from the Census American Community Survey 2016-2020 5-Year data. These additional variables proxy for individual-level attributes discussed in the net-votes analysis. In line with the GMTL decomposition, median household income for Latino-led households in the tract is associated with a significant decrease in Trump support. Similarly, as percent Latino non-college increases, Trump's voteshare also increases. Both of these corroborate the story that lower-SES Latinos were a source of increased 2020 Trump support, even after accounting for his performance in the same Census tracts in 2016.

Table 1 Model 5 attempts to capture generational dynamics. Recall that in the GMTL decomposition there was a large, though imprecisely estimated, boost in Trump support among individuals who indicated that they were the children of immigrants. The Census Bureau does not ask about generational status directly. Instead, we use three variables in an attempt to establish how personal proximity to the immigration experience predicts an increase in Trump support: percent immigrant, which uses the total Latino population in the tract as the denominator; percent of Latino immigrants who are naturalized, an interaction between these variables that should expose the independent effect of the Latino immigrant voting-eligible population; and the percent of native-born Latinos who report that they speak English less than "very well." This final measure speaks to the size of the less "acculturated" U.S. or Puerto Rican-born Latino population within a Census Tract.

The results again provide evidence of shifting loyalties among Latinos proximate to the immigrant experience. In places with more immigrants and a larger share of potential immigrant voters (the interaction term), Trump support 2016-2020 increased significantly, implying that immigrants were a source of Trump gains. Yet, the independent effects of the Latino immigrant population, Latino immigrant naturalization rate, and the percent of the native-born population that is limited English proficient tell a different story. Places with many noncitizen Latino immigrants did not see an increase in Trump support in 2020. Tracts with a high naturalization rate, but few Latino immigrants overall, saw relatively lower levels of Trump support in 2020 compared to 2016. A larger share of U.S or Puerto Rican-born Latinos who exhibit limited English proficiency predicts an increase in Trump support. Model 6 demonstrates that these heterogeneous estimates persist

after controlling for education and income. These results offer tentative evidence that, all else equal, places with a less acculturated and lower-SES Latino population were disproportionately likely to shift toward Trump in 2020. We thus confirm some of the demographic correlates of increased Latino support found in the GMTL decomposition.

## 4 Conclusion

The Republican gains we describe in our paper align with two key processes shaping American politics: ideological sorting and educational polarization. Unlike the general population, these mechanisms have been notably delayed among Latino voters. Though we can only speculate on the source, one plausible reason may be the diminished salience of immigration. Immigration has receded in national importance, with fewer voters, including Latinos, describing it as crucial issue (Sanchez 2021). Even after 2020, economic issues have become more pressing for Latino voters than immigration.<sup>10</sup> Second, while 55% of Latinos viewed Trump as hostile to Latinos in 2016, this number dropped to 29% in 2020 (Sanchez 2021). Decreased immigration salience and reduced perceptions of hostility may be responsible for recent defections.

Given the nature of the subgroups who have shifted most, the evidence suggests a more durable shift toward the Republican party that has less to do with specific campaign messaging or threat. Gains were not found solely among national origin groups or in states where messaging would be expected to have a large impact. We examine election-specific factors such as COVID-19, social media consumption, and BLM protests, and fail to find evidence that these events induced distinctive 2020 GOP shifts. Instead, a segment of the Latino electorate that is in line with Republicans' conservative policy agenda supported Trump in 2020 and are unlikely to transfer support to Democrats going forward.

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<sup>10</sup>UnidosUS and Mi Familia Vota. 2022. "National Survey of Latino Voters." Field Dates: July 20-August 1. Sample Size: N=2,750 (+/- 1.9%).

In Appendix A.8, our data points to a relative consistency in net vote patterns between 2020 and 2022, offering a glimpse into potential trends for the 2024 election. The 2022 analysis also serves to test whether such movements are short-lived and Trump-specific or part of a more enduring realignment. More research is necessary on the reach of these trends into down-ballot races. Still, our findings dovetail with recent literature that also discounts short-term factors, such as the COVID-19 pandemic or threat during the Trump administration, as primary drivers for this shift among Latino voters toward the Republican party (Hopkins, Kaiser and Pérez 2023). This lends credence to the notion that the rightward shift is more structural and likely to persist.

Beyond implications for future trends, our results advance understanding of Latino political behavior in two ways. First, by focusing on net votes, we are able to isolate specific changes in Latino voting patterns. This approach offers a valuable method for examining the scope conditions of the threat-mobilization hypothesis, which has historically been studied by focusing on turnout (White 2016) or partisanship (Bowler, Nicholson and Segura 2006) in isolation. Our second contribution is documenting an influential set of Latino voters who could vote for restrictionist candidates despite being the population of eligible voters most impacted by increased immigration enforcement and punitive policies: working-class Latinos and those closer to the immigration experience. Given the polarized nature of immigration, future research in Latino politics could examine how and when immigrant identities are politically consequential.

Though the future of Latino politics is uncertain, the 2020 election is an opportunity to reflect on the complicated nature of identity-based political behavior. Throughout different eras of U.S. immigration, ethnic voting blocs have formed and dissolved, owing to both changes in the material conditions of group members and shifts in elite behavior (Wolfinger 1965). Assuming a trajectory that favors one political party runs the risk of embracing a “demographic determinism” that does not neatly align with minority voting patterns. This hinders political responsiveness insofar as groups’ political attachments are seen as fixed.

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## A.1 Stability and Instability in Latino Politics

Group attachments have long been known to structure partisanship and voting behavior (Campbell et al. 1960; Berelson, Lazarsfeld and McPhee 1954; Green, Palmquist and Shickler 2002). For voters who identify with a racial/ethnic group, a high sense of in-group loyalty in the non-political realm may translate into political loyalty in terms of attitudes and vote choice (Wolfinger 1965; Manzano and Sanchez 2010).

These ethnic attachments have often been viewed as particularly important for Latinos, relative to non-Hispanic Whites. Similar to African-Americans, where current and past experiences with discrimination and racial hierarchy increase group consciousness and the likelihood of bloc voting (Gurin, Miller and Gurin 1980; Dawson 1994; White and Laird 2020), Latinos have often been understood as politically cohesive due to social factors reinforcing shared political allegiance (Padilla 1985; Michelson 2003). Co-ethnic cues may be especially important for Latino political decision-making given lower levels of party identification (Hajnal and Lee 2011) and the salience of Latino descriptive representation (Pantoja and Segura 2003; Barreto 2010; Manzano and Sanchez 2010).

That said, racial/ethnic self-description as Latino may be insufficient to stimulate Latino “ethnic voting.” As with African-Americans, a sense of linked fate may be the key factor leading to within-group homogeneity in Latinos’ political attitudes/behavior (Sanchez 2006). Linked fate’s influence is not always apparent to the voter, for as Manzano and Sanchez (2010) note, a mix of “deliberate and asserted” traits, along with “ascribed characteristics,” drive Latino group attachments.

We may also question the concept of a “Latino voter” or voting bloc in the first place. As outlined in Beltrán (2010), the appearance of unity among Latinos may be an elite strategy to build group political power by hiding within-group differences. Corral and Leal (2020) find, for instance, that non group-prototypical third-generation and protestant Latinos were a major source of Latino Trump support in 2016.

Previous work also indicates the necessary conditions for Latino bloc voting. These include the presence of descriptive representation and targeted mobilization (Barreto 2010; Michelson 2003; Fraga 2018), group threats (Pantoja, Ramirez and Segura 2001; Pantoja and Segura 2003; Bowler, Nicholson and Segura 2006), and more recently, sustained efforts by the Democratic Party to mobilize on the basis of group threat (Barreto and Collingwood 2015). Following this trend, President Trump’s anti-immigrant rhetoric is thought to have facilitated mobilization by Democrats in 2016 (Gutierrez et al. 2019), a process that should have continued given actions during his presidency (Carlos, Al-Faham and Jones-Correa 2021). However, attention shifted away from immigration in the 2020 race, with the COVID-19 pandemic and corresponding economic concerns being “top-of-mind” for the general public (Ocampo, Garcia-Rios and Gutierrez 2021). Analysts claim that Black Lives Matter protests in 2020 were also a particularly salient driver of Latino vote switching away from Democrats (Klein 2021). Any of these factors would imply relatively transient shifts to Republicans rather than durable changes in party identification or vote choice.

## A.2 Further Explanation for Intuition of Net Votes Analysis

In this section, we provide further intuition for the core estimand of our paper: the difference in net votes across elections. As discussed in Grimmer, Marble and Tanigawa-Lau (2022), net votes in a single election are measured using the following equation:

$$\text{Net Votes}(x) = (Pr(\text{Republican}|\text{turnout} = 1, x) - Pr(\text{Democratic}|\text{turnout} = 1, x)) \times p(\text{turnout} = 1, x) \times p(x) \quad (2)$$

In plain language, the net votes that a party (in this case, Republicans) gains from a particular subgroup is a function of three components: (1) **subgroup vote choice**: the difference in proportion of subgroup voters who support Republicans versus Democrats, (2) **subgroup turnout**: the turnout rate of that subgroup, and (3) **subgroup composition**: the size of that subgroup as a share of the Latino electorate.

To illustrate the calculation of net votes, we provide hypothetical scenarios show the different components operate. Suppose this is a fairly conservative Latino subgroup that tends to support Republicans across elections, and assume the following: The proportion of subgroup voters who support Republicans is  $Pr(\text{Republican}|\text{turnout} = 1, x) = 0.6$ , those who support Democrats is  $Pr(\text{Democratic}|\text{turnout} = 1, x) = 0.4$ , the turnout rate of that subgroup is  $p(\text{turnout} = 1, x) = 0.7$ , and its size as a share of the Latino electorate for the year is  $p(x)_{\text{year}} = 0.2$ . In plain language, 60% of voters from this subgroup support Republicans, relative to 40% who support Democrats, members of this group have a turnout rate of 70%, and this subgroup reflects 20% of the eligible Latino voters.

With these numbers in hand, the net votes can be calculated using the equation:

$$\text{Net Votes}(x) = (0.6 - 0.4) \times 0.7 \times 0.2 = 0.028$$

According to this equation, this subgroup contributes 2.8% of the eligible voting population in vote margin to the Republican candidate. Put simply, Republicans have a net vote advantage over Democrats within this particular subgroup.

### A.2.1 Shift in Net Votes

When comparing *across* elections, the appropriate estimand is the shift in net votes, which we denote as  $\text{Diff Net}(X)$  in the paper. This can be calculated in a similar way as Eq. 2, except the net vote quantity is estimated across two elections. This is provided by the following equation:

$$\text{Diff Net}(x) = \text{Net Votes}_t(x) - \text{Net Votes}_{t-1}(x) \quad (3)$$

where

$$\text{Net Votes}_t(x) = (Pr(\text{Republican}|\text{turnout} = 1, x)_t - Pr(\text{Democratic}|\text{turnout} = 1, x)_t) \times p(\text{turnout} = 1, x)_t \times p(x)_t \quad (4)$$

and

$$\text{Net Votes}_{t-1}(x) = (Pr(\text{Republican}|\text{turnout} = 1, x)_{t-1} - Pr(\text{Democratic}|\text{turnout} = 1, x)_{t-1}) \times p(\text{turnout} = 1, x)_{t-1} \times p(x)_{t-1} \quad (5)$$

$t$  represents a specific election. This estimate captures how the net votes for a specific subgroup evolve from one election cycle to the next. With this equation in hand, we can derive three different paths to losses in net votes over time. We present the three hypothetical scenarios (and values) below.

## A.2.2 Different Paths to Losses in Net Votes

Assume the following values for a baseline election (e.g., 2016): Proportion of subgroup voters who supported Republicans in the previous period is  $Pr(\text{Republican}|\text{turnout} = 1, x)_{t-1} = 0.6$ , those who supported Democrats is  $Pr(\text{Democratic}|\text{turnout} = 1, x)_{t-1} = 0.4$ , the turnout rate of that subgroup in the previous period is  $p(\text{turnout} = 1, x)_{t-1} = 0.7$ , and its size as a share of the electorate in the previous period was  $p(x)_{t-1} = 0.2$ .

With these baseline values, we can explore three different scenarios for how net votes may decline over time, focusing on each component of the equation.

### A.2.2.1 Decreases in turnout

First, consider a drop in turnout rate from 0.7 to 0.6, while other variables remain at their baseline values.

$$\text{Diff Net}(x) = (0.6 - 0.4) \times \mathbf{0.6} \times 0.2 - (0.6 - 0.4) \times \mathbf{0.7} \times 0.2 = -0.004$$

The net votes for Republicans from this subgroup would decrease by 0.004 due to the decrease in participation from one election to the next.

### A.2.2.2 Decreases in Vote Choice

Second, assume a decline in Republican preference from 0.6 to 0.5, while all other factors remain constant.

$$\text{Diff Net}(x) = (\mathbf{0.5} - 0.4) \times 0.7 \times 0.2 - (\mathbf{0.6} - 0.4) \times 0.7 \times 0.2 = -0.014$$

Here, the net votes for Republicans would decline by 0.014 due to shifts in vote choice.

### A.2.2.3 Decreases in Composition

Lastly, let us assume the subgroup's share of the Latino electorate shrinks from 0.2 to 0.1, with all other variables constant.

$$\text{Diff Net}(x) = (0.6 - 0.4) \times 0.7 \times \mathbf{0.1} - (0.6 - 0.4) \times 0.7 \times \mathbf{0.2} = -0.014$$

In this case, the net votes for Republicans would decline by 0.014 because the subgroup grew more slowly as a part of the electorate relative to other subgroups.

These scenarios reveal why losses in net votes might be observed for traditionally Democratic or Republican groups despite high levels of baseline support. As shown above, if a subgroup is less likely to turnout or grows more slowly than other subgroups over time, this can lead to a decline in net votes even when there is robust support for a particular party. The examples above are illustrative, and scenarios are not mutually exclusive. In reality, subgroups could simultaneously experience changes across all three dimensions. Still, decomposing the different aspects of the net votes estimand demonstrates the limitations of focusing solely on changes in vote choice to interpret electoral shifts. In neglecting these additional factors, we risk overlooking the various dynamics that contribute to electoral change. In the following section, we describe how interactions between components may inform how we think about prominent frameworks in the Latino politics literature such as the “threat-mobilization” hypothesis.

### A.3 Why net votes are an important theoretical quantity for testing the threat-mobilization hypothesis

Previous studies have illuminated the power of threat in shaping Latino partisanship and mobilization (Bowler, Nicholson and Segura 2006; White 2016; Pérez 2015; Walker, Roman and Barreto 2020). In their canonical article, Bowler, Nicholson and Segura (2006) examine the implications of California Propositions 187, 209, and 227 – propositions that were perceived as explicitly targeting Latino immigrants – on partisanship among different voters in California including Latinos. Bowler and colleagues found that these initiatives halted favorable trends toward the GOP that were occurring in the period prior to the propositions. Bowler and colleagues posit that Latino departures from the GOP were due to an issue-based realignment, where the GOP’s stance on racially charged ballot initiatives cumulatively pushed Latinos toward the Democratic Party. The study primarily examined changes in partisanship, however, without considering the effects of threat on turnout. More recent studies such as White (2016), Pérez (2015), and Walker, Roman and Barreto (2020) have examined the impact of threat on political participation. Consistent with the earlier threat-mobilization studies, these studies have highlighted the importance of racially targeted policies, but have rarely modeled the *joint* effects of threat on mobilization and partisan voting.

Though there is no issue *per se* with treating participation and vote choice as independent outcomes, understanding the *electoral* implications of threat-mobilization requires a multi-faceted approach. The net votes estimand combines vote choice, voter turnout, and demographic composition into a single, comprehensive metric.

To illustrate why the net votes estimand might be useful for understanding the real-world implications of the threat-mobilization hypothesis, let us consider hypothetical scenarios derived from the literature.

- **Turnout Increases, Democratic Losses:** According to White (2016), exposure to the Secure Communities program increased Latino turnout by 2.3pp in areas that were “reluctantly” introduced into the program. In this hypothetical, assume we double this effect to  $2 \times 2.3pp = 4.6pp$ . Adding this to the 2016 Latino turnout rate of 48%, the new estimated turnout for 2020 becomes 52.6%. Simultaneously, the Democratic vote share among Latinos is assumed to decrease from 71% in 2016 to 63% in 2020, as is consistent with estimates from the election data firm Catalist. With Latinos growing as a share of the electorate from 9% to 10%, the Net Diff(x) is  $-0.00447$ , reflecting a loss in net votes for Democrats even with a substantial increase in voter turnout. This is due to the shift in voting patterns, which effectively cancels out the gains in political participation.

$$\text{Net Diff}(x) = (0.63 - 0.37) \times 0.526 \times 0.1 - (0.71 - 0.29) \times 0.48 \times 0.09 = -0.004$$

- **Partisan Shift:** Based on the findings of Bowler, Nicholson and Segura (2006), restrictionist immigration propositions in California led to an 11.4pp shift towards the Democratic Party among Latinos. Suppose threat had driven Latinos to identify with the Democratic Party in a similar fashion. Applying this to a 2016 baseline Democratic vote share of 71%, the new hypothetical vote share for 2020 becomes 82.4%. Keeping turnout and composition constant, the Net Diff(x) becomes 0.010.

$$\text{Net Diff}(x) = (0.824 - 0.176) \times 0.48 \times 0.09 - (0.71 - 0.29) \times 0.48 \times 0.09 = 0.010$$

- **Threat Mobilizes and Changes Partisan Voting Patterns:** Combining both the doubled turnout increase from White (2016) and the partisan shift from Bowler, Nicholson and Segura (2006), the hypothetical turnout becomes 52.6%, and the Democratic vote share becomes 82.4%. This results in a

Net Diff(x) of 0.016.

$$\text{Net Diff}(x) = (0.824 - 0.176) \times 0.526 \times 0.1 - (0.71 - 0.29) \times 0.48 \times 0.09 = 0.016$$

These hypothetical scenarios, grounded in empirical findings, offer a more comprehensive interpretation of threat's electoral influence. Traditional approaches that study these dimensions in isolation could miss this interaction and, consequently, underestimate or overestimate the electoral implications of the threat-mobilization hypothesis. A crucial intuition that emerges from the net votes estimand is that threat can have multiplicative effects. In cases where it affects both vote choice and turnout, it can augment mobilization efforts. However, in cases where partisan loyalties also shift, it can produce net losses in votes if some group members abandon their usual partisan affiliations in threatening settings.

Our focus on shifts in net votes within subgroups is also theoretically informative. As studies such as Pérez (2015) and Garcia-Rios, Pedraza and Wilcox-Archuleta (2019) highlight, threats are far from uniform and may impact group members who already possess high levels of identity salience or are disproportionately targeted by restrictionist policies. This implies that assessing the threat-mobilization process without attending to subgroup differences may obscure electoral patterns among groups that are unlikely to perceive threat in the first place. Moreover, subgroup analyses can illuminate where candidates are actually receiving their electoral support within broader ethnic or racial categories. Without this level of granularity, we risk painting a misleading picture of the role of threat in shaping electoral outcomes and reinforce essentialist views of panethnic categories.

## **A.4 COVID-19 did not have a disproportionate impact on Biden support among Latinos**

As a first step, we analyze the potential impact of transient factors not likely to persist beyond the 2020 election cycle. Just as in previous elections, news media focused on campaign dynamics and linked contemporary events outside of the candidates' control to election outcomes. However, academic analyses indicate that these "shocks" only served to reinforce longstanding trends in American politics, in particular, partisan polarization (Sides, Tausanovitch and Vavreck 2022).

Throughout the spring and summer of 2020 the COVID-19 pandemic dominated Americans' concerns. Though partisan differences in policy were minimal at the outset of the pandemic, Republican states such as Florida, Louisiana, and Mississippi adopted a more laissez-faire strategy as the pandemic raged on, whereas Democratic states like California and New York enacted mask mandates, occupancy restrictions, and other policies meant to stem the tide of the virus. Many Latino voters bore the brunt of the pandemic, both in terms of higher mortality rates (Andrasfay and Goldman 2021), but also through lost wages or lost earning capacity (Vargas and Sanchez 2020). This may have generated possible "pocketbook" reasons to vote against the Democratic Party (Lewis-Beck 1985). Though previous studies have shown that the role of economic self-interest is narrow and often fails to explain voting behavior (Sears et al. 1980; Sears and Funk 1991), there is some evidence that Latinos weigh these considerations in their vote choice (Abrajano, Michael Alvarez and Nagler 2008). Recent evidence indicates that Latinos who emphasized concerns about COVID-19 were particularly likely to support Trump in 2020 (Ocampo, Garcia-Rios and Gutierrez 2021).

We test this "COVID-19 backlash" explanation by using the Democracy Fund + UCLA Nation-scape (NS) data set. NS is a large-scale survey of Americans that began in July 2019 and concluded



February 2021. NS is ideal for evaluating over-time trends due to large samples per wave that also include significant numbers of minority respondents. NS surveyed 69,072 Latino respondents in 50 states and D.C., yielding a Latino sample approximately 17x larger than other large-sample surveys of Latinos such as the 2020 Collaborative Multiracial Post-Election Survey (CMPS).

We leverage NS to examine if over-time changes in pandemic-related trends yielded increases in Trump support. Specifically, we use dynamic multi-level regression and post-stratification (MRP) models (Caughey and Warshaw 2015) to estimate two-way state-level support for Biden over the course of election season, and assess if changes in pandemic-related variables contributed to a Latino-specific penalty. An advantage of this panel design is that we can adjust for unobserved differences between states (e.g., different demographics, policy environments, partisanship, Covid-19 reporting standards). We include the logged count of Covid-19 deaths per 100,000 people and measures of state-level mobility produced by Google (Cot, Cacciapaglia and Sannino 2021) to capture changes in the severity of the pandemic over time.<sup>1</sup>

We estimate the following model using ordinary least squares (OLS):

$$\Delta Y_{tg} = \alpha_g + \beta_{1g} \Delta \text{Mobility} + \beta_{2g} \Delta \text{Log(COVID deaths per 100,000)} + \beta_{3g} \text{state} + \beta_{4g} \text{wording} + \varepsilon_{tg} \quad (6)$$

where  $\Delta Y_{tg}$  represents the monthly change in state-level Biden support in month  $t$  for group  $g$  (i.e., Latinos, non-Hispanic whites),  $\beta_1$  reflects the marginal effect of reductions in mobility,  $\beta_2$  represents the marginal effect of increases in Covid-19 deaths,  $\beta_3$  adjusts for state-specific trends, and  $\beta_4$  represents a step dummy that adjusts for a change in survey wording that occurred in September 2020. Coefficients are standardized to facilitate the interpretation of the estimates.

We estimate regressions separately for each group, and present the coefficients in Figure A1. Adjusting for unobserved differences between states and over-time changes in Covid-19 deaths, we find evidence that a standard deviation unit decrease in state-level mobility – a proxy for over-time fluctuations in Covid-19 mitigation policies – is associated with a .8 percentage point (pp) decrease in Biden support among Latinos. However, the marginal effect for non-Latinos is even larger ( $\beta_1 = 1.6\text{pp}$ ), which runs counter to the expectation that Covid-19 had a *differentially* large effect among Latinos. While we detect a penalty among Latinos due to monthly increases in logged fatalities, the difference between groups is substantively small and statistically insignificant. In sum, while we find that decreased mobility due to Covid-19 may have contributed to lower Biden support among Latinos, these patterns were similar – if not more pronounced – among non-Latinos.

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<sup>1</sup>We estimate a single-factor model to combine Google mobility data on time spent in retail locations, grocery stores, transit, workplaces, and residences ( $\alpha = .75$ ).

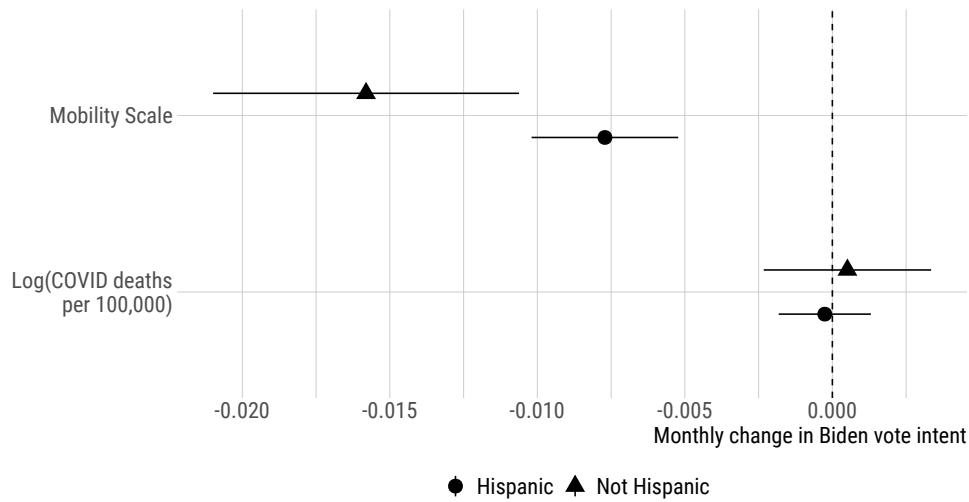


Figure A1: **Coefficient estimates for an OLS regression of monthly changes in Biden vote intent on pandemic-related variables** Point estimates with triangles and circles denote estimates for non-Hispanic whites and Hispanics/Latinos, respectively. Lines extending from point estimates indicate 95% confidence intervals. Full model results can be found in Table A1.

Outcome: Biden vote intent		
	Hispanic	Not Hispanic
Mobility Scale	-0.008 (0.001)	-0.016 (0.003)
Log(Covid-19 Deaths)	-0.0003 (0.0008)	-0.0005 (0.001)
Wording Change	0.022 (0.002)	0.018 (0.004)
N	410	410
RMSE	0.01	0.01
Clustered SEs	by: State	by: State
Fixed Effects: State	✓	✓
Observations	410	410
Adj. $R^2$ :	.32	.18

Table A1: Full Model Results

## A.5 No evidence of a BLM protest-induced decline in Biden support

We now turn to whether the BLM protests that spread across the country after George Floyd's murder in Minneapolis had a discernible effect on aggregate evaluations of Biden using Nationscape

data. We do so by plotting the dynamic MRP estimates generated above for each survey month and state. Each line represents the monthly estimate of Biden support within a given state. The black line represents the mean estimate, averaging across states. As shown in Figure 11, evaluations of Biden were steadily declining long before the BLM protests in late May and early June. Indeed, during this period, Biden support reaches a kind of stasis before slightly increasing in the run-up to the election. Of course, this does not preclude the possibility that *some* Latinos may have been more responsive than others (in either direction), but we consider it unlikely that the BLM protests were responsible for the broad-based shifts observed across states and among different national origin groups, given the secular declines in support that preceded the national outcry.

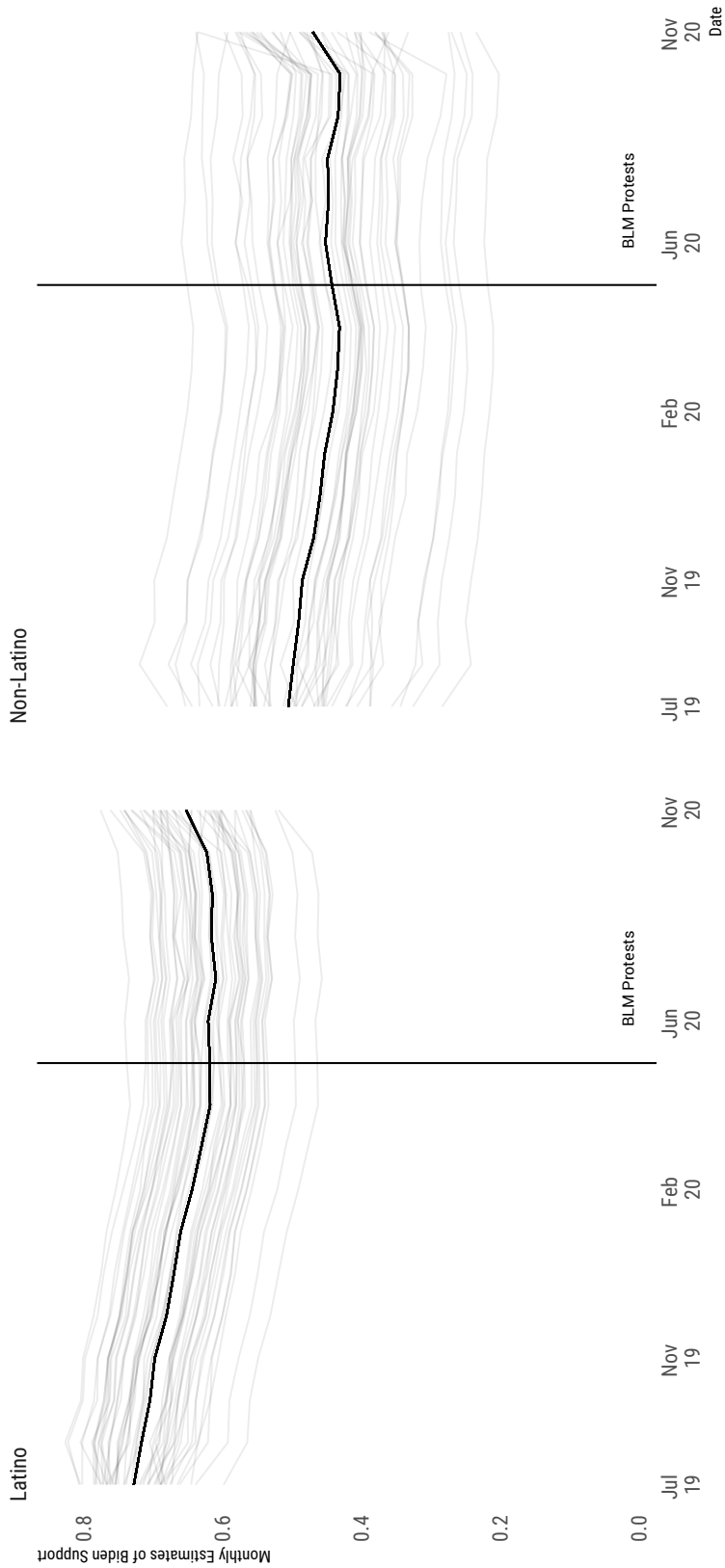


Figure A2: **Time series estimates of Biden support by group and state** Individual lines represent state-level dynamic MRP posterior median estimates of Biden support for each group. The dark line represents the mean estimate, averaging across states. Full set of dynamic MRP estimates can be accessed in the replication materials.

## A.6 Baseline support for Democrats is higher in heavily Latino areas

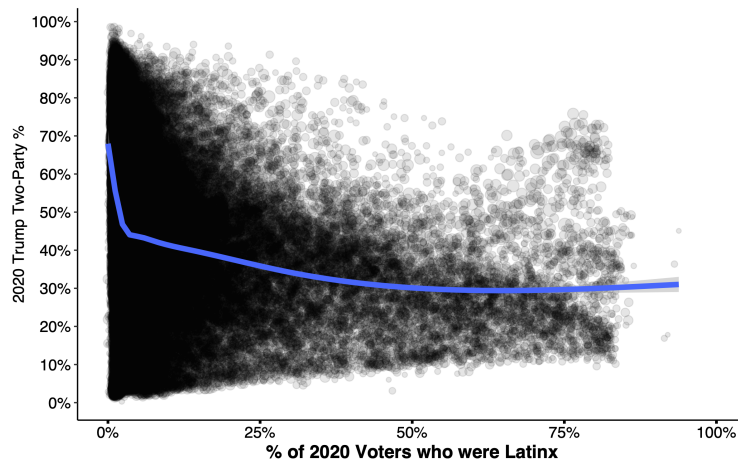


Figure A3: **Census Tract-level Trump 2020 Voteshare as a function of % Latino/a/x Voters.** Blue line represents a loess smoother.

Figure A3 presents a scatterplot of the relationship between Trump’s share of the 2020 presidential vote and the percent of 2020 voters in the Census tract who were Latino. Each point in the scatterplot indicates a Census tract, with the size of the circle scaled to the size of the tract.<sup>2</sup> The blue line superimposed on the scatterplot is a loess smoother, documenting the nonparametric bivariate relationship. The figure demonstrates that Trump’s share of the two-party vote is negatively correlated with the percent of voters who were Latino, with a very strong difference between tracts with virtually no Latinos (which support Trump by a 2-1 or even greater margin) and tracts that have at least some Latinos, but where the share of voters that were Latino was less than 10%. Beyond that percentage, Trump performs worse in tracts until approximately 50% of voters are Latino. After that, the level of support for Trump stops declining and levels off at approximately 30%.

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<sup>2</sup>Note that the size scaling is topcoded at 10,000.

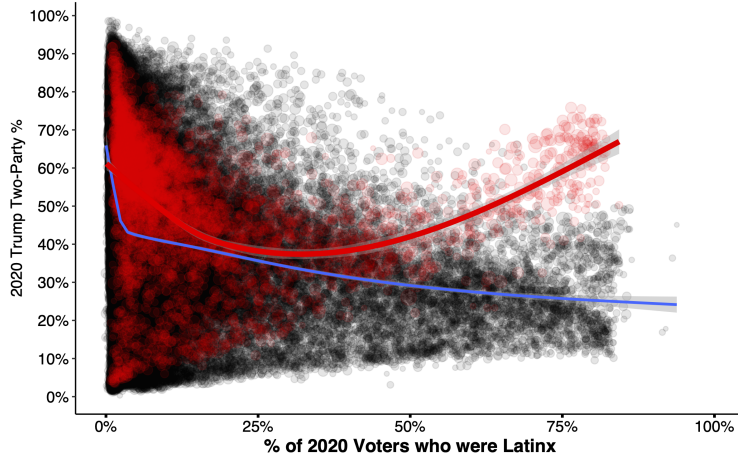


Figure A4: **Census Tract-level Trump 2020 Voteshare as a function of % Latino/a/x Voters.** Blue line represents a loess smoother run on tracts outside of Florida. Red points and line indicate Census Tracts in Florida.

Figure A3 suggests that in nearly homogeneous Latino Census tracts Trump was able to get an average of 30% of the vote. However, the geographic distribution and characteristics of these Census tracts *outside* of their percent Latino is not at all equal. Figure A4 demonstrates that, as in previous elections, strong Republican performance in heavily-Latino neighborhoods was isolated almost entirely to Florida. The leveling off that appeared in Figure A3 is a product of Florida’s curvilinear relationship between Latino voter percentage and Trump support, where some heavily-Latino census tracts gave Trump over 70% of the vote.

## **A.7 Trump’s performance in 2020 improved over 2016 in heavily-Latino areas nationwide**

While the tract-level analysis does not allow us to observe vote switching at an individual level, we can further probe shifts in Latino support for Trump by examining changes in partisan vote totals and overall levels of support in heavily-Latino Census tracts.

We first examine vote totals by presidential candidate and election for 2016 and 2020. Figure A5 presents a bar chart of raw candidate vote totals in heavily-Latino voter Census tracts, broken up by state.

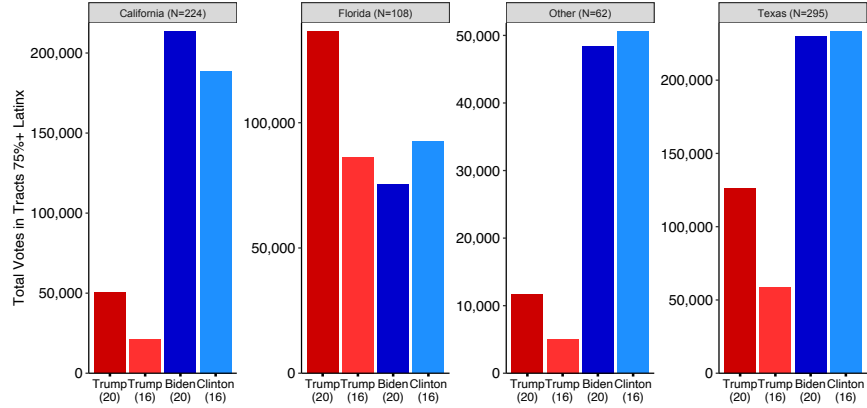


Figure A5: **Total Presidential Votes in 2016 and 2020 in heavily-Latino Census Tracts.** Includes 689 Census Tracts where 75% or more of 2016 voters were Latino. “Other” includes tracts in AZ, CO, IL, LA, MA, NJ, NM, NY, and PA.

Overall, Figure A5 indicates that Biden received a similar number of votes as Hillary Clinton did in 2016, but ran slightly behind Clinton’s total, with the exception of California. However, across states, Trump saw a much larger improvement in terms of the number of votes he received relative to 2016. In California, Texas, and the aggregation of 9 states with a small number of heavily-Latino voter Census tracts, Trump more than doubled his raw vote total in his reelection effort. In all cases, Trump gained more votes relative to his 2016 effort than Biden gained relative to Clinton. Again, the disproportionate shift in raw votes received by Trump may mask significant vote switching on the part of individual voters. However, Figure A5 implies that broad increases in turnout among Latinos in 2020 generally did not favor Biden over Trump.

State	Trump 2020 % - Trump 2016 %
AZ	12.3 pp
CA	8.6 pp
FL	16.4 pp
IL	6.6 pp
MA	15.4 pp
NJ	14.2 pp
NM	11.7 pp
NY	10.5 pp
PA	10.7 pp
TX	13.5 pp
<b>National</b>	<b>11.8 pp</b>

Table A2: **Trump 2020 Voteshare - Trump 2016 Voteshare in heavily-Latino Census Tracts, weighted statewide averages.** Only includes Census Tracts where 75% or more of 2020 voters were Latino. Statewide averages are weighted by the number of Latino voters in the Tract in 2020. “National” aggregates data from all of the listed states.

Table A.7 aggregates Census Tract-level election results for 2020 and 2016 in states with heavily-Latino Census Tracts (Tracts where 75% or more of 2020 voters were Latino). As with Figure A5, we see that Trump did significantly better in heavily-Latino areas in states in 2020 relative to 2016, for a nationwide average gain of 12 percentage points in heavily-Latino areas.

Figure A6 presents all of the tract-level data and demonstrates that a strong relationship emerged between % Latino and the gains Trump made in 2020 relative to 2016 in each state (Figure A6).

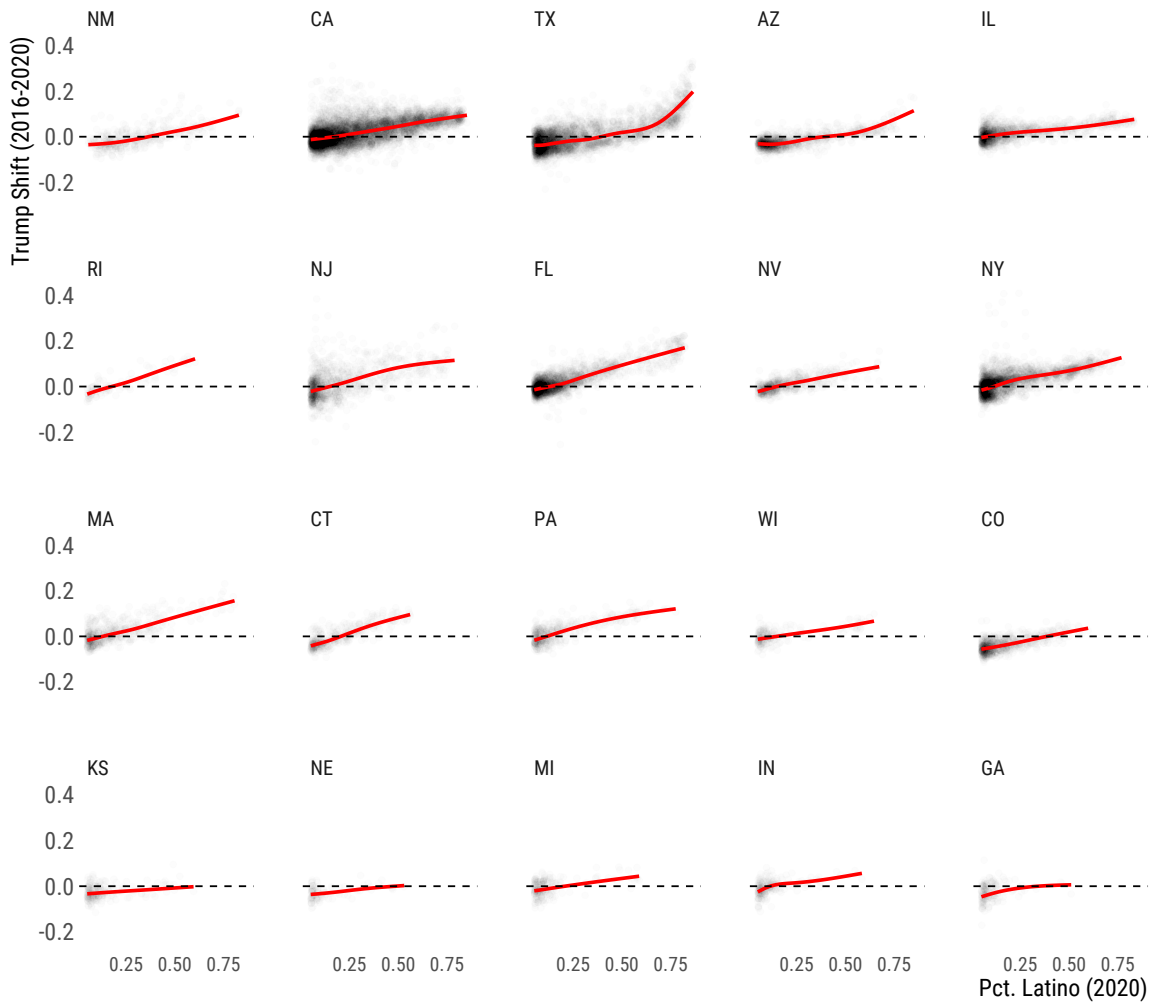


Figure A6: **Census Tract-level Trump 2020 Voteshare as a function of % Latino Voters, by State.** Includes all states with at least one majority-Latino Census Tract as of 2020. Points indicate Census tracts. Red line represents a spline smoother run on all Census tracts within the state.



	Main Text			
	Model (6)	Exclude FL	Exclude TX	Exclude CA
% Latino Voters (2020)	0.117*** (0.002)	0.100*** (0.002)	0.118*** (0.002)	0.134*** (0.002)
Trump Voteshare (2016)	0.915*** (0.001)	0.900*** (0.002)	0.913*** (0.002)	0.931*** (0.002)
% New Voters (Among Latinos)	0.042*** (0.003)	0.043*** (0.003)	0.041*** (0.004)	0.038*** (0.004)
log(Latino HH Income)	-0.006*** (0.001)	-0.002*** (0.001)	-0.006*** (0.001)	-0.008*** (0.001)
% Non-College (Among Latinos)	0.014*** (0.002)	0.030*** (0.002)	0.004* (0.002)	0.015*** (0.002)
% Immigrant (Among Latinos)	0.003 (0.003)	-0.011** (0.003)	0.009* (0.003)	0.003 (0.003)
% Latino Immigrants Naturalized	-0.007*** (0.002)	-0.004* (0.002)	-0.006** (0.002)	-0.006*** (0.002)
% Native-Born Latinos LEP	0.025*** (0.003)	0.020*** (0.003)	0.027*** (0.003)	0.031*** (0.003)
% Immigrant $\times$ % Naturalized	0.070*** (0.006)	0.039*** (0.006)	0.057*** (0.006)	0.076*** (0.006)
(Intercept)	0.024** (0.008)	-0.009 (0.008)	0.033*** (0.008)	0.035*** (0.009)
<i>N</i>	19,124	17,432	16,406	13,762
<i>R</i> <sup>2</sup>	0.961	0.962	0.958	0.964

Table A3: **Census Tract-level regressions predicting Trump 2020 two-party voteshare, holding out CA, FL, or TX.** Unit of observation is the 2020 Census tract. Estimates derived using a weighted least-squares model. \*  $p < 0.05$ , \*\*  $p < 0.01$ , \*\*\*  $p < 0.001$

## A.8 2022 Analysis

Given that our analysis examines two elections, it remains uncertain whether the shift in Latino support for Republicans signifies transient changes due to election-specific factors (e.g., incumbency effects, Covid-19) or a longer-term realignment. As of this writing, the 2022 midterm serves as the only additional data point to validate or challenge our findings that key Latino segments have increasingly favored Republicans. A limitation of this test is that midterm electorates are demographically distinct from those in presidential election years. Additionally, midterm turnout generally falls about 10 percentage points below presidential year turnout rates. Applying the net votes equation to the 2022 case yields the following components:

$$\begin{aligned} \text{Diff Net}(x) = \text{Net Republican}_{2022}(x) - \text{Net Trump}_{2020}(x) = \\ [p(\text{House R} \mid \text{turnout} = 1, x)_{2022} - p(\text{House D} \mid \text{turnout} = 1, x)_{2022}]p(\text{turnout} = 1 \mid x)_{2022}p(x)_{2022} - \\ [p(\text{Trump} \mid \text{turnout} = 1, x)_{2020} - p(\text{Biden} \mid \text{turnout} = 1, x)_{2020}]p(\text{turnout} = 1 \mid x)_{2020}p(x)_{2020} \end{aligned} \quad (7)$$

Assuming identical vote choice and composition for a voting bloc across both elections, the net votes estimate will be negative simply due to lower midterm turnout. While this issue is intractable when comparing different election types, we can introduce simplifying assumptions about turnout stability to project changes in net votes for 2024. Specifically, we assume (1) stable subgroup turnout and (2) that 2022 voting patterns and composition will mirror those in 2024. Although these assumptions are strong, they are more instructive than ignoring the electoral behavior differences between midterms and presidential elections. We produce a provisional estimate below, fixing 2020 turnout rates and allowing for variations in composition and vote choice.

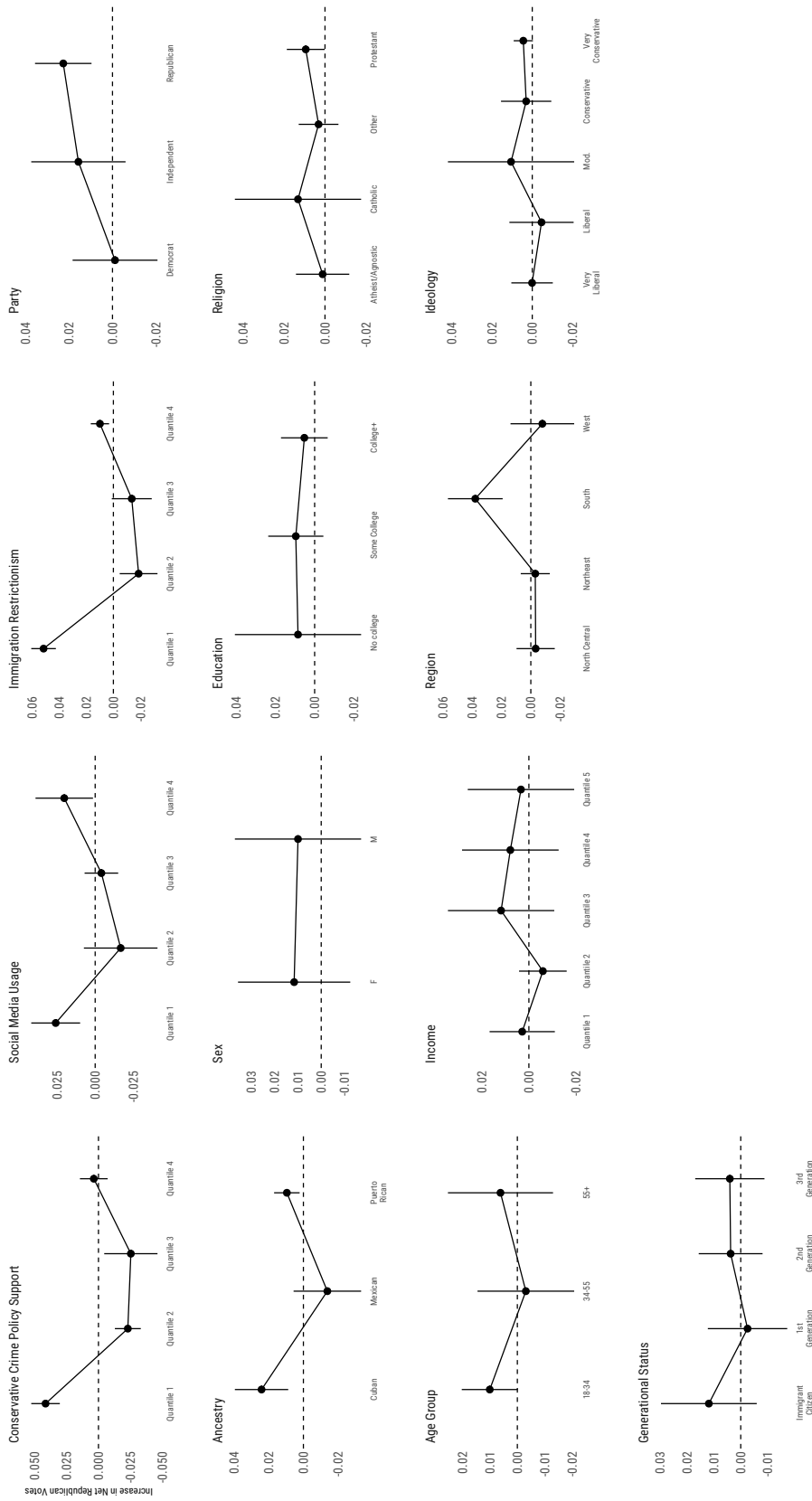
As shown in Figure A7, we observe increases in Republican net votes among Republican identifiers, those at the lower end of conservative crime policy, those at the lower end of immigration restrictionism, young Latinos, Latinos living in the South, Cuban Americans, Puerto Ricans, and those in the 18-35 category. We observe decreases in Republican net votes for those in the middle quartiles of conservative crime policy support and immigration restrictionism. For the remaining subgroups, we observe stable levels of support since 2020.

As in the 2016-2020 comparison, positive net votes for Republicans can be attributed to a combination of shifts in turnout, subgroup vote share, and composition (see Figure A8). Republicans saw gains in vote share over 2016 in most subgroups, which accounts for their positive net votes. Notable reversals occurred among Latinos who hold conservative views on crime and immigration; here, the vote share for Republicans decreased by 5 percentage points across various levels of immigration restrictionism and by 10 percentage points among those in the third quartile of immigration restrictionism. However, these gains for Democrats are largely offset by compositional shifts. Specifically, the population in the first quartile of conservative crime policy and immigration restrictionism shrank in 2022, producing a Republican-favoring tilt in net votes.

Overall, findings indicate stable voting patterns with modest Republican gains and losses in narrow cases. Given the strong simplifying assumption of identical subgroup turnout in 2020 and 2024, however, we conduct sensitivity analyses to assess hypothetical turnout increases among Democratic-leaning subgroups (or decreases among Republican-leaning subgroups) over 2020 that would be necessary to produce *positive* increases in net votes for Democrats.

For subgroups like Cuban Americans and Southern Latinos, changes in composition and vote choice, not just turnout, are necessary for Democratic gains. Put another way, decreasing turnout would not be enough. Other factors such as Republican vote choice and composition would also have to decline. To offset Democratic losses among remaining subgroups, turnout adjustments would need to be substantial. For example, to produce positive Democratic net votes among those in just above the median of conservative crime policy attitudes, 2024 turnout for this group would need to drop by 31 percentage points. For Latinos with the most inclusive views on immigration, turnout would need to increase by an equivalent amount to reverse losses in net votes to offset compositional decreases. Given the sensitivity analysis, fixing 2022 turnout to 2020 levels is not entirely unreasonable for many subgroups. Large shifts in turnout would be required to alter observed trends, making the turnout stability assumption not as problematic as it might initially

seem. In summary, while it is unclear whether 2024 will align with these projections, current evidence suggests that the 2016 to 2020 shifts are not transient but may indicate a lasting shift in loyalties.



**Figure A7: Increase in net Republican votes from 2020 to 2022 among different Latino subgroups, fixing turnout to 2022 levels.** Positive scores indicate that House Republican candidates gained votes (relative to Trump) within a subgroup across elections. Negative scores indicate House Democratic candidates gained votes (relative to Biden) across elections. Estimates are for Latinos only. Full model estimates can be found in replication materials.

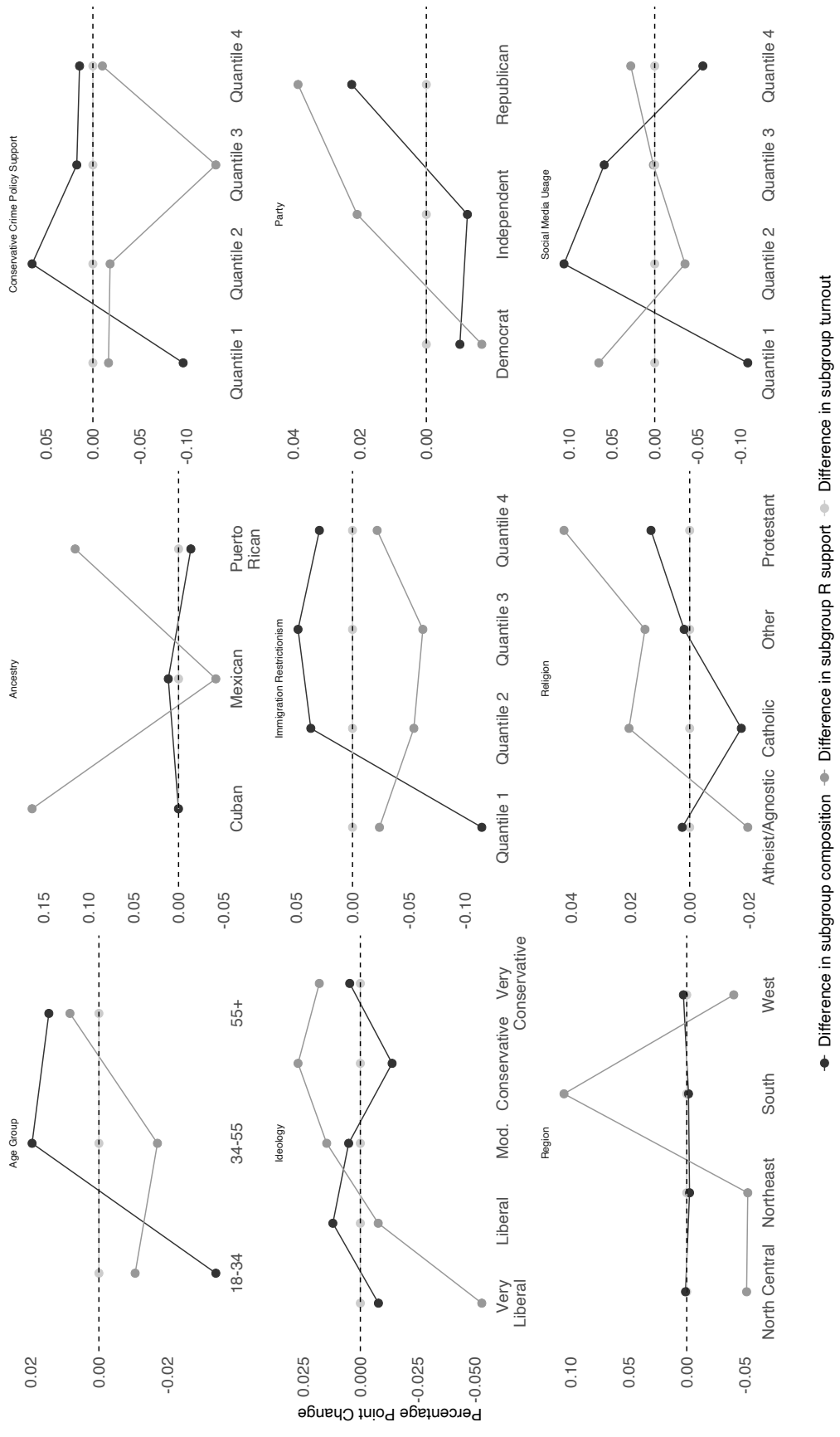


Figure A8: Decomposition of net votes estimate (2020-2022), fixing subgroup turnout to 2020 levels. Full model estimates can be found in replication materials.

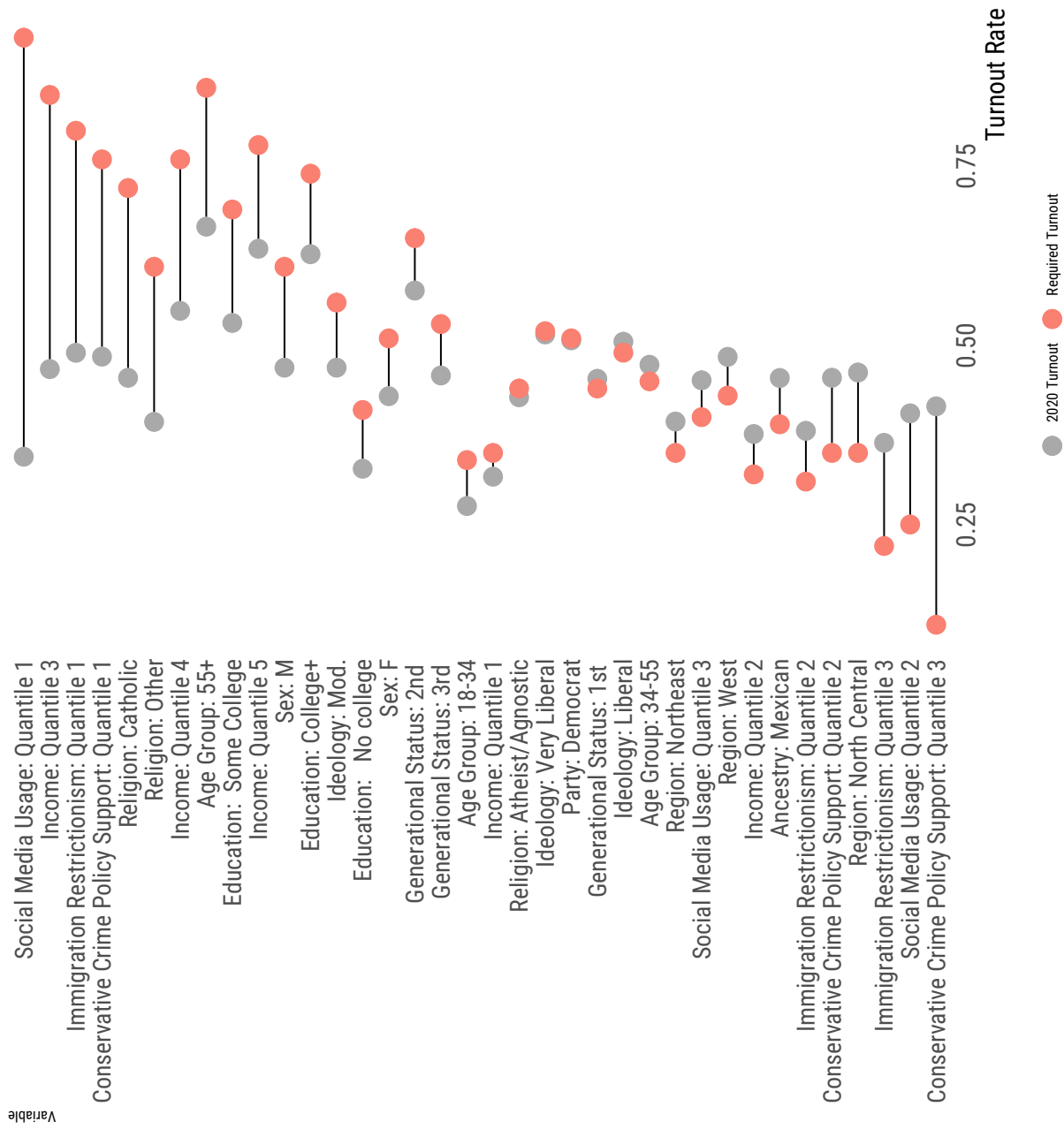


Figure A9: Sensitivity analysis assessing required level of turnout to reverse Democratic net vote losses

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