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## Political Partisanship as a Social Identity

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### Summary and Keywords

Partisanship remains a powerful influence on political behavior within developed and developing democracies, but there remains a lively debate on its nature, origins, and measurement. In this debate, political scientists draw on social identity theory to clarify the nature of partisanship and its political consequences in the United States and other developed and developing democracies. In particular, social identity theory has been used to develop an expressive model of partisanship, which stands in contrast to an instrumental model grounded in ideological and policy considerations. Included here are a discussion of the key motivational and cognitive components of social identity theory and an explanation of how the theory can be applied to the study of partisanship. The focus is on the measurement of partisanship, its social nature, its origins in convergent identities, and its ability to generate strong emotions and drive political engagement. Lastly, areas for future partisanship research are discussed. These areas include the study of negative partisan identities, coalitional identities in multiparty systems, and the political situations in which expressive and instrumental aspects of partisanship are most common.

Keywords: social identity, partisanship, political emotion, political involvement

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### Introduction

Partisanship remains a powerful influence on political behavior within developed and developing democracies (Brader & Tucker, 2009; Brader, Tucker, & Duell, 2013; Dalton & Weldon, 2007; Green et al., 2002). In empirical American political science, party identification is one of the most important variables, explaining vote choice, political engagement, partisan reasoning, and the influence of partisan elites (Bartels, 2002; Campbell et al., 1960; Green, Palmquist, & Schickler, 2002; Huddy et al., 2015; Lavine, Johnston, & Steenbergen, 2012; Lewis-Beck et al., 2008; Nicholson, 2012; Sniderman &

Stiglitz, 2012). No other single variable comes close to accounting as well or as consistently for American political behavior. While levels of partisanship have declined in a number of other developed democracies (Dalton & Wattenberg, 2002) partisanship remains a potent political force nonetheless (Bartle & Bellucci, 2009; Holmberg, 2007).

If the influence of partisanship on political behavior is not in dispute, there remains a lively debate on its nature, origins, and measurement. A growing number of researchers have drawn on social identity theory (Green et al., 2002; Huddy et al., 2015) to clarify the nature of partisanship and its political consequences in the United States and other developed and developing democracies (e.g., Bankert, Huddy, & Rosema, 2017; Carlson, 2016; Lupu, 2013). Four aspects of partisanship are better understood through the lens of social identity theory: the measurement of partisanship, its social nature, its origins in convergent identities, and its ability to generate strong emotions and drive political engagement. The application of social identity theory in each of these areas has advanced the study of partisanship.

## The Nature of Partisanship

There remains disagreement on the exact nature of partisanship. Campbell et al. (1960) defined partisanship in *The American Voter* as both a set of beliefs and feelings that culminate in a sense of “psychological attachment” to a political party. This definition has generated two competing views of partisanship: instrumental and expressive (Arceneaux & Vander Wielen, 2013; Lupu, 2013).

From an *instrumental* perspective, partisanship is a running tally of party performance, ideological beliefs, and proximity to the party in terms of one’s preferred policies that is affected by current features of the political environment (Downs, 1957; Fiorina, 1981; Achen, 2002). This conceptualization of partisanship is rooted in the rational choice paradigm, which stresses utility maximization as the driving force behind political decision making and involvement. In this model, various factors such as economic evaluations, presidential approval (MacKuen et al., 1989), policy preferences, and party performance (Fiorina, 1981), as well as candidate evaluations (Garzia, 2013), affect party loyalties and can lead partisans to abandon their party preferences if the party no longer satisfies these instrumental considerations. The instrumental model of partisanship is appealing because its predictions are generally uniform across members of the electorate and variations in the design of electoral systems. Moreover, the rational voter can base a political decision on either ideological considerations or—in the absence of attitude constraint—a mix of various policy preferences, allowing for flexibility in voters’ level of political sophistication and issue intensity.

In a competing *expressive* approach, fleshed out by Green, Palmquist, and Schickler (2002) in *Partisan Hearts and Minds*, partisanship is an enduring identity strengthened by social affiliations to gender, religious, or ethnic and racial groups. These social affiliations

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with a party and its associated groups promote an emotional attachment to the party, generate stability over time in partisan identification and vote choice, and diminish the political influence of short-term events on party loyalties. Green and colleagues describe the process by which people come to identify with a political party as starting with the question: “What kinds of social groups come to mind as I think about Democrats, Republicans, and Independents? Which assemblage of groups (if any) best describes me?” (p. 8), rather than with the question: “Which party best represents my political positions?”

Distinct expressive and instrumental approaches to partisanship have coexisted in political science research since at least the early 1980s when researchers articulated a singular instrumental perspective (Fiorina, 1981; Franklin & Jackson, 1983). This was met by comparable efforts to formalize and empirically examine an expressive approach to partisanship (Fowler & Kam, 2007; Gerber, Huber, & Washington, 2010; Green et al., 2002; Greene, 2002; Iyengar, Sood & Lelkes, 2012; Lupu, 2013; Nicholson, 2012). The expressive approach has gained growing popularity as a counter to the instrumental approach because it can better account for the stability of partisan attachments, their relative immunity to short-term economic and political fluctuations, the powerful influence of partisanship on vote choice independently of issue preferences, and the power of partisan elites to influence rank-and-file partisan opinion—evidence that is difficult to reconcile with the instrumental model (Cohen, 2003; Dancey & Goren, 2010). It is also consistent with evidence that partisans are relatively unaware of changes in the party’s platforms (Adams et al., 2011) and are motivated to argue against political information that contradicts their prior beliefs and convictions (Taber & Lodge, 2006; Lodge & Taber, 2013; Lebo & Cassino, 2007).

Nonetheless, both the expressive and instrumental approach continue to attract ardent supporters. Both models can claim empirical support, and there is growing evidence that instrumental and expressive accounts of partisanship may explain vote choice and public opinion at different times, under differing conditions, and among different segments of the electorate (Arceneaux & Vander Wielen, 2013; Bullock, 2011; Lavine et al., 2012).<sup>1</sup> For example, Huddy and colleagues (2015) argue against an “all or nothing” approach to partisanship and instead highlight the role of competition for partisan power and status during election season in creating an environment in favor of an expressive model of partisanship. Strong partisans in particular will be affected by their party’s electoral fate boosting their political action. This competitive spirit, however, subsides between elections, bringing other identities or political considerations to the foreground in shaping political involvement. Therefore, partisanship likely is a mix of both instrumental and expressive factors, and the conditions under which one or the other model holds sway is worth future research investigation.

Nevertheless, the differentiation of expressive and instrumental aspects of partisanship is important for several reasons. First, the two models construe democratic citizens differently. In the instrumental model, voters resemble the ideal citizen who is capable of (and presumably willing to) competently navigate the political environment and make

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political decisions based on careful examination of the political choices at hand. In contrast, in the expressive model, voters are motivated to defend the party in order to maintain its positive standing underlining the tribal nature of politics. Supporting this notion, a recent study by Miller and Conover (2015) found that 41% of partisans agreed that simply winning elections is more important to them than policy or ideological goals in getting them engaged in politics, compared to 35% who viewed policy as more important.

In that sense, an expressive model of partisanship also provides a motive for biased reasoning. Expressive partisans are motivated to defend their party's positions and status, which results in the biased processing of information. When people engage in motivated reasoning, they downgrade the quality of an argument that contradicts their view, scrutinize a contrary message to a far greater degree than one that is congenial in order to refute it, evaluate supportive arguments as stronger than contrary ones, and seek out information that confirms their view (Kunda, 1990; Taber & Lodge, 2006). This process generates attitude stability and maintains political beliefs. It is also at odds with an instrumental model in which partisans are thought to evenhandedly consider political information.

Second, the instrumental and expressive model also have different implications for democratic accountability: If campaign engagement is grounded in instrumental policy considerations, then campaign donations, volunteering, and other activities will increase the electoral success of candidates and parties most in sync with the engaged electorate's issue preferences. This should lead, in turn, to the enactment of legislation consistent with those preferences. But if campaign engagement involves expressive partisanship, its policy implications are less clear and its advancement of normative democratic goals is less certain. Consider the subset of American political conservatives who hold liberal economic and social policy stances (roughly 30% of conservatives according to Ellis & Stimson, 2012). To the extent to which these conflicted conservatives work on behalf of Republican candidates (as some surely do), they send a distorted political signal in support of candidates who do not promote their policy goals.

Third, from a practical political standpoint campaigns can be run very differently if voters are driven to take action on the basis of expressive versus instrumental considerations. A candidate facing an electorate engaged by instrumental concerns needs to focus on policy. In contrast, a candidate facing supporters with highly expressive partisan concerns can run a campaign built more on slogan than on substance. For example, generating anger at the opposing side is a highly effective way to elicit political engagement and action. For these reasons, it is important to assess more fully the extent to which partisanship is driven by instrumental and expressive considerations.

# Partisanship as a Social Identity

Social identity theory provides a strong foundation for the study of partisanship and political involvement. A social identity involves a subjective sense of belonging to a group, which is internalized to varying degrees, resulting in individual differences in identity strength, a desire to positively distinguish the group from others, and the development of ingroup bias (Tajfel, 1981). Moreover, once identified with a group, or in this instance political party, members are motivated to protect and advance the party's status and electoral dominance as a way to maintain their party's positive distinctiveness (Huddy, 2001). In developing the theory, Tajfel and Turner (1979) placed key emphasis on this need among group members "to differentiate their own groups positively from others to achieve a positive social identity" (Turner et al., 1987, p. 42).

In contrast to other intergroup research paradigms such as realistic group conflict theory, social identity theory does not focus on competition over scarce resources as a driver of group identity and intergroup conflict. Instead, the motivation to protect and advance group status is a cornerstone of the social identity approach and the psychological foundation for the development of ingroup bias. Those who identify most strongly with their group express the greatest ingroup bias, generating the expectation that the strongest partisans will work most actively to increase their party's chances of electoral victory and boost its status (Andreychick et al., 2009; Fowler & Kam, 2007; Ethier & Deaux, 1994). The social identity model of partisan politics may be even easier to understand when placed in the context of sports teams. Weakly identified fans may attend games when the team is doing well and skip those where defeat is likely, but strong fans hang on and participate, even when the team is sure to lose, in order to boost their team's chances of victory.

The motivational underpinnings of social identity theory are *central* to understanding its expressive nature and ability to motivate political action. Partisans take action precisely because they wish to defend or elevate the party's political position. Their internalized sense of partisan identity means that the group's failures and victories become personal. The maintenance of positive group distinctiveness is an active process, especially when a group's position or status is threatened, helping to account for the dynamic nature of partisan political activity (Huddy, 2013; Mackie et al., 2000). Elections pose threats to both a party's power and less tangible goods such as group members' collective social standing, and electoral involvement is one way in which partisans can defend their party against such potential losses or ensure gains. In that sense, social identity theory provides a more complete and dynamic account of expressive partisanship than is found in previous political behavior research.

While the impact of partisan identities is well documented, the next challenge is to obtain a better understanding of their origins. Social categorization theory forms the cognitive underpinning of social identity theory (Turner et al., 1987). In social categorization theory, groups are cognitively represented by prototypes—typical members who define

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the group and convey information about the central characteristics of group members. Prototypes can also be equated with group stereotypes. Based on their perceived similarity with these prototypes or group stereotypes, people estimate how well they match the party profile. Partisan prototypes or stereotypes are long-lasting which helps to explain why partisanship is relatively stable despite changes in party platform and economic performance. From this perspective, partisanship is the result of a cognitive matching process in which people compare their self-image to the types of people and social groups that are associated with a political party and then sort themselves politically on that basis.

Identities also form through the merger of component demographic identities based on race, ethnicity, gender, and class. Social identity theory underscores the power of identity convergence, which can create especially powerful identities. Roccas and Brewer (2002) develop the concept of identity complexity to capture this dynamic. They measured the extent to which different social groups were perceived to share characteristics and members, and they discovered that individuals who are members of highly overlapping groups (those in which members share similar characteristics and/or include many of the same people) are more reactive to group-based threats than members of groups that are not seen as overlapping. Mason (2015, 2016) has demonstrated this process in the United States where evangelical, conservative, and Republican identities have merged, as have black, secular, liberal, and Democratic identities. In other countries, parties are likely to be especially strong and politically consequential when based on religious, regional, and ethnic identities, such as the Scottish National Party in the UK or the Sweden Democrats who married social conservatism with a strong nationalistic identity.

When fully developed, both the motivational and cognitive aspects of social identity contribute to an understanding of partisanship. The greater levels of political engagement observed among partisans are motivated by their defense of the party. The origins of partisanship in self-categorization help to explain why members of a particular religion or ethnic group are more attached to one party rather than another.

# The Measurement of Partisan Identity

In the United States, partisanship is typically measured with a single standard question: “Generally speaking, do you think of yourself as a Democrat, a Republican, or an Independent?” Partisans are then asked if they are strong or not so strong partisans and Independents whether they are closer to Democrats or Republicans. The traditional measure does not distinguish between an instrumental and expressive basis for partisanship and captures very minimal variation in partisan strength, simply distinguishing between strong and not so strong identifiers. A similar single question is employed in other nations. In the Comparative Study of Electoral Systems (CSES), survey respondents are asked: “Do you usually think of yourself as close to any particular party?” This question captures partisan direction and is followed by a question on how close the person feels to the party. In most countries that participate in the CSES, the question garners a majority of respondents who feel close to a party, although in a few countries this does not occur.

The social identity approach to partisanship generates the need for a more finely differentiated measure of partisanship that taps identity and does so across a greater range of intensity than typical partisanship questions. In recent research grounded in a social identity approach to partisanship, scholars have extended the expressive partisanship model beyond the United States: Bankert, Huddy, and Rosema (2017) developed a measure of partisan identity in the United Kingdom, Sweden, and the Netherlands based on the Identification with a Psychological Group (IDPG) scale created by Mael and Tetrick (1992; see also Greene, 1999, 2002, 2004). Huddy et al. (2015) also developed a comparable shorter four-item scale to assess partisan identity in the United States, assessed in a random sample of New York state residents, college students, and opt-in Internet panels. All of these partisan identity scales include items designed to capture a subjective sense of group belonging, the affective importance of group membership, and the affective consequences of lowered group status, which are crucial social identity ingredients (Ellemers et al., 1999; Leach et al., 2008). Table 1 provides wording and responses to all eight partisan identity questions in each of these three European countries.

The partisan identity questions elicit considerable variance across countries, as can be seen in Table 1. Partisan strength is highest in the UK, followed by Sweden and then the Netherlands. For example, when asked if they say “we” rather than “they” when talking about their party, only 25% of respondents in the UK strongly disagree, whereas 80% of the Dutch and 65% of Swedes say they never feel this way. When asked if they feel connected with someone who supports their party, 57% of UK respondents agree; 27% of Swedes and 16% of the Dutch say they feel this way always or often (see also Bankert et al., 2017).

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Table 1: Partisan Identity Items by Country.



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	The Netherlands				Sweden				United Kingdom (Wave 3)			
	Always	Often	Sometimes	Never	Always	Often	Sometimes	Never	Strongly agree	Agree	Disagree	Strongly disagree
When I speak about this party, I usually say “we” instead of “they.”	2	5	14	79	5	10	20	65	7	18	50	25
I am interested in what other people think	3	22	51	24	7	30	45	19	12	61	21	6

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about this party.												
When people criticize this party, it feels like a personal insult.	1	3	23	74	1	6	33	59	5	22	50	23
I have a lot in common with other supporters of this party.	3	26	46	25	2	33	50	14	12	65	18	5

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If this party does badly in opinion polls, my day is ruined .	1	5	29	65	1	3	20	77	2	12	55	31
When I meet someone who supports this party, I feel connected with this	2	14	44	40	3	24	52	21	6	51	32	11

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person .												
When I speak about this party, I refer to them as “my party.”	1	6	17	76	3	7	17	73	5	15	54	26
When people praise this party, it makes me feel good.	5	24	44	28	6	21	42	30	6	47	34	13
<b>N</b>	4,691				2,464				5,954			

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*Note:* Entries are percentages. The UK and Swedish studies were based on opt-in internet panels whereas the Dutch sample was drawn as a true probability sample (Bankert et al., 2017).

(\*) Items included in the short four-item partisan identity scale.

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An Item Response Theory analysis revealed that the scale works in the same way in all three European countries and measures partisan identity well across its range. In contrast, the traditional single item of partisan strength performed less well in distinguishing differing levels of partisan identity across its range. In additional analyses, the authors found that a shorter four-item scale works almost as well as the longer eight-item version. Items in the shorter scale are marked with an asterisk in Table 1.

The multi-item partisan identity scale had greater predictive validity than the standard single-item version in the United States and all three European countries, providing a superior predictor of in-party voting and campaign involvement than the standard single-partisanship item. (Huddy et al., 2015; Bankert et al., 2017).

Contrary to conventional wisdom, the scale does not entail reverse coded items, which are often seen as a tool to reduce acquiescence bias among respondents. However, certain theoretical and methodological concerns discourage the use of reverse-coded items in this context. From a theoretical standpoint, phrasing scale items in the opposite direction is reasonable when the underlying construct has opposite ends such as a party preference or political issue positions. The partisan identity scale, however, measures the intensity of an attachment that respondents indicate in a prior question. Reverse-coded items would thus measure the absence of an attachment that respondents have already acknowledged. In that sense, the items measure an attitude's intensity, not direction. From a methodological perspective, reverse-coded items can also complicate factor structures (Netemeyer, Bearden, & Sharma, 2003) and even affect dimensionality. Moreover, given that the scale is recommended for use in comparative research, reverse-coded items might muddle comprehension (Swain, Weathers, & Niedrich, 2008), especially when translated into another language (Wong, Rindfleisch, & Burroughs, 2003).

One final measurement question concerns the assessment of partisan identity among political independents. Following conventional wisdom (Keith et al., 1992), researchers have typically assessed partisan identity among independent leaners, those who call themselves independents but report feeling closer to one than another party (Huddy et al., 2015; Bankert et al., 2017). This increases the range of the identity scale and enhances its effects. There is also some evidence that a strong identity as a political independent boosts political engagement. Klar (2014) found higher levels of political engagement (action, interest, and discussion) among political independents who rated their partisan identification as more important. In contrast, Huddy and colleagues (2015) found that pure independents who scored highly on a four-item measure of independent identity were more interested in politics but were not more politically active (in unpublished data). These mixed results may arise because political independents are a complex mix of the fiercely politically independent, the politically apathetic, and those masking their partisanship at least in the United States (Klar & Krupnikov, 2016).

# The Social Nature of Partisanship

One of the key unaddressed questions within the study of partisanship concerns fluctuations in its strength. Past studies have emphasized the stability of partisanship. But as Johnston notes, most research on partisanship has focused on investigating the direction of partisanship and its sources, even though “it seems fairly clear . . . that [partisan] intensity varies more than direction does” (Johnston, 2006). Despite this observation, political scientists have yet to fully explore the sources of this variation in partisan strength. The lack of a fine-grained measure of partisanship has contributed to this gap in the literature. The introduction of a multi-item partisan identity scale, however, alters that situation and makes it easier to study variation in partisan strength over time and across situations.

Social identity theory, and self-categorization theory more specifically, shed light on the potential dynamics of partisan identity strength, emphasizing the role of party elite members in shaping the party’s prototype. According to Hogg and Reid (2006), group leaders communicate their prototypicality to their followers through the use of pronouns such as “we,” and in reference to common goals and concerns, through language that is pervasive in political speeches. Such leaders can be regarded as identity entrepreneurs who define the group, its allies, and its enemies.

Especially in a candidate-centered electoral system like that of the United States, party elite members have a disproportionate influence on how their party is perceived by the public in general and its partisans in particular. For example, former Democratic president Barack Obama was more likely to increase black identification with the Democratic Party than a more peripheral African American politician. In this way, prototypical group members help to define the group and establish group boundaries that partisans use to estimate how well they fit in with their party. From this vantage point, partisan strength is a function of category match.

Prior research in social psychology has provided empirical support for this hypothesis, demonstrating that more prototypical group members tend to identify more strongly with their group and, consequently, also display more pronounced group behaviors: they show greater ingroup loyalty, and ethnocentrism, and they generally behave in a more group-serving manner (Hogg, 2001; Hogg & Hardie, 1991, 1992; Hogg, Hardie, & Reynolds, 1995).

Matching oneself to a group prototype, however, does not explicitly distinguish between similarity based on social characteristics over those grounded in political considerations. In that sense, it has been difficult to test whether partisan identity is largely instrumental or social in origin. In one of the few attempts to disentangle the two dimensions, Bankert (2016) conducted an experiment in which survey respondents were matched to a fictional in-party leader based on their political issue preferences, including gender-based issues such as abortion. In addition, the respondents were randomly assigned to be of the same

or a different gender. Results provided some support for the expressive model in which social characteristics additionally influence partisanship. Partisanship increased in strength among women who were matched with a female politician but only when the fictional politician was perceived as a typical party member. This meant that being matched to a woman politician boosted partisanship for female Democrats but not female Republicans. While these results suggest that expressive factors boost party attachments above and beyond instrumental concerns, it remains unclear what factors shape perceptions of typicality. Further research is needed to compare and contrast the effect of expressive and instrumental determinants. This study illustrates the social nature of partisanship in the sense that both instrumental (i.e., political issue preferences) and expressive factors (i.e., gender) determine partisan strength.

## Convergent Identities

Another process that strengthens partisanship is the convergence of partisan and social identities. It is possible to follow the roots of identity convergence back to seminal voting studies (Lazarsfeld, Berelson, & Gaudet, 1948; Campbell, Converse, Miller, & Stokes, 1960) that introduced the idea of cross-pressured voters. Early electoral studies indicated that partisans who identified with groups associated with the opposing party were less likely to vote. Lipset (1960) went so far as to call these cross-pressured voters “politically impotent,” suggesting that “the more pressures brought to bear on individuals or groups which operate in opposing directions, the more likely are prospective voters to withdraw from the situation by ‘losing interest’ and not making a choice” (p. 211). Additional research found that these voters are less strongly partisan (Powell, 1976) and that such “cross-cutting cleavages” mitigate social conflict (Lipset, 1960; Nordlinger, 1972). More recent work has suggested that cross-pressures do in fact reduce the strength of partisan affiliation and levels of political activism (Brader, Tucker, & Theriault, 2013; Mason, 2015; Mutz, 2002).

African Americans provide a powerful example of identity convergence, involving party and race. They exhibit an impressive degree of racial identity and loyalty, are staunch Democrats, and are far more likely than whites to vote for black Democratic candidates (Reese & Brown, 1995; Philpot & Walton, 2007; Sigelman & Welch, 1984). The electoral effect of group loyalties is most pronounced among African Americans who identify with both the Democratic Party and their racial group (Tate, 1994; Dawson, 1994). In exit polls conducted during the 2008 Democratic presidential primaries (pitting Barack Obama against Hillary Clinton), respondents in 31 states were asked whether race constituted the single most important factor, one of several important factors, or was not important in their vote choice. This is admittedly a crude way to get at the influence of racial loyalties because not everyone is aware of or willing to admit that their vote was affected by such considerations. Nonetheless, roughly 30% of black men and women said that race was important to their vote, and they voted overwhelmingly for Obama. Moreover, in a 2008



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Democratic primary poll conducted in Pennsylvania by *Time* magazine, blacks strongly supported Obama based on their concern about racial discrimination in American society (Huddy & Carey, 2009). The fusion between black and Democratic identity is palpable.

Huddy and Colleagues (2016) have examined the process of identity convergence among Latinos in the United States. They found Latinos to be more likely to identify with the Democratic than the Republican Party, a preference that has intensified in recent years (Bowler & Segura, 2011). But the explanation for this increase in Democratic affiliation remains contested. Is it based on instrumental concerns about immigration policy and immigrant benefits, or does it involve concerns about the respect Latinos receive from the two major political parties? Huddy et al. analyzed data from two Latino surveys: Latino citizens included in the main and oversample component of the 2012 American National Election Study (ANES) Time Series and Web component, and immigrants included in the 2012 Latino Immigrant National Election Survey (LINES) (Huddy et al., 2016). Both studies involve a panel that was interviewed just before and just after the 2012 presidential election.

In support of social identity theory and identity convergence, Latinos who identified with their ethnic group and perceived widespread ethnic discrimination were far more likely to identify with the Democratic Party. Furthermore, Democratic partisanship increased over the course of the election among those with a strong Latino/Hispanic identity. The increasing alignment between Hispanic and Democratic identities also holds powerful implications for Latinos' political engagement. A strong partisan identity increased Latinos' political campaign activity, even among noncitizens who engaged in the election by talking to others and exhibiting campaign buttons and stickers. Garcia-Rios and Barreto (2016) document a similar trend, finding that those who feel a sense of linked fate with other Latinos (an element in the Latino identity scale used by Huddy et al.) and consumed Spanish language television were more politically active in the 2012 campaign.

Mason (2015, 2016) provides the best case for the enhanced power of multiply convergent identities. In a recent study, she assessed multi-item identity scales as secular, evangelical, black, liberal, conservative, and Tea Party supporter and calculated the degree of alignment between these identities and partisan identity (Mason, 2016). Aligned partisans had stronger emotional reactions to an experimental message that either threatened or reassured their party's future electoral success. Aligned partisans are stronger partisans, but aligned partisans had even stronger emotional reactions than those who simply reported a strong partisan identity. This finding demonstrates that aligned identities may capture an aspect of partisanship that is not detected by the partisan identity measure alone. The convergence of social and political identities is linked to sorting individuals into the "right" political party. But it is more than just matching or lining up group-linked policy issues. In Mason's research, taking strong stances on a range of policies including group-linked issues does not account for the intensity of emotional reactions observed among partisans with highly aligned identities (Mason, 2015, 2016).

# Partisan Emotions and Political Engagement

Finally, the political consequences of partisanship deserve closer attention from political scientists. The social identity approach redirects attention away from the study of public opinion and electoral choice, which has attracted the lion's share of partisanship research, to focus on political action where expressive partisanship is especially powerful. Partisans vote at higher rates than political independents, participate more actively in politics, care more about it, and follow it more closely (Abramson & Aldrich, 1982; Brady, Verba, & Schlozman, 1995; Campbell et al., 1960; Rosenstone & Hansen, 1993). But this heightened activity could stem from either expressive or instrumental partisan concerns. On one hand, involvement could be largely expressive, grounded in partisan loyalty and the protection and advancement of the party independently of policy issues. On the other hand, campaign involvement could be largely instrumental, based on the protection and advancement of valued public policies and political ideology. Abramowitz (2010) underscores the large gaps between Democrats and Republicans on issues such as health care and racial matters, in support of an instrumental explanation. At the same time, powerful animosity between Democrats and Republicans in the United States suggests a process that is more expressive in nature and goes beyond instrumental concerns (Iyengar et al., 2012).

Emotions play a central role in explaining political engagement. In politics, anger motivates political interest and protest activity, and positive enthusiasm is associated with political engagement (Groenendyk & Banks, 2014; Marcus et al., 2000; Smith et al., 2008; van Zomeren, Postmes, & Spears, 2008; Valentino et al., 2011). From a social identity standpoint, partisan anger is most likely to arise in response to electoral threats, whereas positive emotions increase under conditions of electoral reassurance. These emotions are a major facet of group life, including partisan politics. They are often most intense among the strongest group identifiers who feel angrier than weak identifiers in response to a collective threat (Rydell et al., 2008; van Zomeren, Spears, & Leach, 2008). Green et al. (2002) note differing partisan emotions after George W. Bush was deemed to be the winner of the contentious 2000 presidential election, with Republicans feeling "thrilled" and "relieved," Democrats feeling "angry" and "cheated," and Independents feeling far less emotion. Strong group identifiers are also more likely than weak identifiers to vilify an opposing group under conditions of threat (Huddy, 2013; Mackie et al., 2000). A similar dynamic is at work within electoral politics.

Strong group identifiers also feel more positive emotion when their group status is enhanced. For example, strong partisans in the United States felt increased *schadenfreude*, a complex positive emotion, when they read about bad things happening to or reflecting poorly on a political candidate of the other party. They even feel this positive emotion in reaction to events that are clearly negative, such as increased U.S. military deaths in Iraq (Combs et al., 2009). We expect strong partisans to feel similarly positive when something good happens to their party or when they anticipate electoral

victory. This expectation helps to explain an interesting paradox. If strong partisans expect to win an election, there is little instrumental need for them to participate. Yet, the heightened positive feelings generated by an expected victory will motivate them to get involved because positive emotion is a prelude to action (Huddy et al., 2015; Bankert et al., 2017).

In theory, strong emotions such as anger can arise in response to a blocked policy goal or defeated legislation. There is growing experimental evidence, however, that a threat to a party's political status is more likely to generate strong emotional reactions than a threat to specific policies. Huddy et al. (2015) experimentally threatened or reassured a respondent's party position on health care and gay marriage. Anger did not increase among those who held the party's position most strongly and cared most about gay marriage or health care. Likewise, those with a strong position on gay marriage or health care that was consistent with their party did not feel more enthusiastic when the party's position was bolstered by the experimental blog message. The emotional ups and downs of an election campaign seem tied far more closely to status-related concerns over winning and losing than to policy-related gains and losses, lending further empirical support to an expressive model of partisanship.

## Expressive versus Instrumental Partisanship

So far, empirical support for an expressive model of partisanship grounded in social identity theory has been considered. Finally, attention is now given to a major alternative approach: the instrumental model of partisanship. The extent to which partisanship reflects issue preferences, a reasoned and informed understanding of the parties' positions, and is responsive to ongoing events and political leadership remain central concerns for normative democratic theorists. As a test of instrumental partisanship, researchers have examined its origins in long-standing socioeconomic cleavages and contemporary forces such as issue proximity and leader evaluations (Dalton & Weldon, 2007; Garzia, 2013). Garzia (2013) reports, for example, that a mixture of social cleavages and leader evaluations have shaped partisanship in the UK, Germany, Italy, and the Netherlands, with leader evaluations eclipsing the importance of social factors in recent decades.

Researchers have also examined the degree to which partisans are aware of ideological shifts in a party's platform, with mixed results. Adams et al. (2011) find that the public remains unaware of a party's changed platform, whereas Fernandez-Vazquez (2014) reports a slight change in voters' perceptions that falls far short of the magnitude of actual change. Based on this accumulated research, partisanship appears somewhat responsive to certain contemporary forces such as changing leadership but much less so to shifting party positions, providing modest support at best to the instrumental model. In other research, partisans seem immune to accusations of poor party performance, weak

leadership, or an altered platform, resulting in a relatively stable political identity (Green et al., 2002).

Huddy et al. (2015) have directly compared the expressive and instrumental approaches as explanations for in-party voting and political engagement. From an instrumental perspective, partisanship depends on agreement with the party on major policy issues and judgments concerning the party's competence and performance. In research comparing the two approaches, the political effects of the multi-item partisan identity scale are typically contrasted with a scale of ideological issue intensity. The ideological intensity scale is created from respondents' positions on a series of key issues consistent with the stance of their party. Typically, stances on these issues are combined to assess the intensity of the person's agreement with their party's positions (see Huddy et al., 2015).

Huddy and colleagues find greater support for the expressive than the instrumental approach in their studies. First, in-party voting is better predicted by partisan identity than ideological consistency in the UK, Sweden, and the Netherlands. Campaign activity is even more powerfully predicted by partisan identity than ideological consistency in the United States and the three European countries (Huddy et al., 2015; Bankert et al., 2017). Finally, anger felt in response to a statement threatening a party loss or enthusiasm felt in response to a statement predicting party victory is conditioned on strong partisan identity. Strong issue ideologues do not react more angrily to threat, but they do feel more enthusiastic when exposed to a reassuring message; however, this effect is much smaller than that of partisan identity. Furthermore, when a sample of American college students was threatened with either status- or issue-based electoral losses, anger was far more aroused by a decline in party status than by a defeat for ideologically consistent issues. In the same vein, party victory aroused enthusiasm among those with a strong party identity, but an ideological victory did not increase enthusiasm among those with a strong ideological stance. In other words, strong, ideologically consistent students did not react to policy-based threat or reassurance with increased anger or enthusiasm, in stark contrast to the greater emotion aroused by party threats and reassurances among those with a strong partisan identity (Huddy et al., 2015).

In comparing the expressive and instrumental approaches, researchers have focused on issue positions, not ideological self-placement as a liberal or conservative, or left- or right-wing sentiments as an indicator of ideology. There is growing evidence that ideological self-placement is in itself an identity which is more expressive than instrumental in nature. From that vantage point, self-reported ideology is not necessarily a coherent belief system that aligns political preferences and values. For example, Ellis and Stimson (2012) find that roughly 30% of self-identified American conservatives hold completely liberal stances on economic and social issues, suggesting that their stances are shaped less by policy goals than by expressive factors. Similarly, Malka and Lelkes (2010) find that ideological identities function similarly to partisan identity, driving liberals and conservatives to adopt a position attributed to their ideological group that is at odds with actual ideological principles. The authors argue that an ideological identity as

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conservative or liberal is distinct from a conservative or liberal ideology. Thus, social identity theory can also be applied to the study of other politically potent identities such as ideology and single-issue identities such as right-to-life or pro-choice on abortion (for a similar argument, see Mason, 2016).

# Conclusion

The social identity approach to partisanship is insightful. It generates a new approach to the measurement of partisan identity; sheds light on the origins of partisanship in social characteristics shared with typical partisans; underscores the political power of a partisan identity grounded in other primary ethnic or ideological identities; and points to the power of partisanship to arouse emotions that drive political engagement in turn. In particular, the inadequate measurement of partisanship (via the traditional one-item question) has led to the underestimation of the link between partisanship and political activity. It has also made it difficult to track fine-grained changes in partisanship over time. The adoption of a multi-item measure of partisan identity should help to rectify this situation and allow researchers to observe changes in levels of partisan affiliation over time and track the consequences of these shifts within European and other polities.

A social identity approach to the study of partisanship also helps to explain current political behavior. In the United States, the greater emotionality of strong partisans, especially their greater anger in response to threat, helps to explain the vitriolic nature of current party politics (Iyengar, Sood, & Lelkes, 2012). Once angry, partisans are less influenced by information, more likely to act, minimize the risk associated with action, take riskier actions, and in general drive politics in an extreme direction (Huddy et al., 2007). In a revealing study, Harbridge and Malhotra (2011) found that strong partisans were the only group of Americans to express less support for bipartisanship than partisan politicians of their party. Of course, the positive side of intense partisan identities is increased political involvement. Strong partisan enthusiasm for party candidates increases voter turnout and other forms of electoral activity (Marcus et al., 2000).

In Europe, declining levels of partisanship hint at the potential for destabilized politics as weak identifiers abandon their parties (Dalton & Wattenberg, 2002). The decline in partisanship has led to greater electoral volatility, an increase in personality-centered elections, and heightened economic voting (Dalton & Wattenberg, 2002; Kayser & Wlezien, 2011). Multiparty systems also raise questions about several other aspects of partisanship. Are party identities positive, or can they be negative, so that an identity rests on not identifying with a specific party? Garry (2007), for example, utilizes an affective measure to account for multiple and negative party attachments in Northern Ireland. Medeiros and Noël (2014) demonstrate the predictive power of negative partisanship in Australia, Canada, New Zealand, and the United States. Similarly, Caruana et al. (2015) demonstrate that negative attitudes toward a political party, assessed as negative feelings or an absolute unwillingness to vote for them, can decrease its electoral support, increase turnout in an election, and promote political engagement, including protest and online political activity. In a next step, political scientists need to examine the validity of the negative partisanship measure in order to distinguish negative attitudes toward a political party and a truly negative identity. It is possible to adapt the

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partisan identity measure discussed here to the assessment of a negative identity by modifying items to refer to the party with which one does not identify (e.g., “When people criticize X, it makes me feel good”).

Another central question is whether citizens identify with a larger coalition of parties or with a single party within a coalition. Hagevi (2015) examined this in Sweden, measuring identification with a single political bloc and found additional effects of bloc identification on vote choice. This approach could be expanded to develop a multi-item identity scale with a political coalition and a specific party to contrast their relative political effects. Moreover, the expressive approach to partisanship predicts that a coalition identity will increase the positive ratings of all coalition parties and their leaders, whereas a primary party affiliation would suggest higher ratings for one’s own party than coalition parties. The identity approach to partisanship thus lends itself well to the study of party affiliations in multiparty systems, opening several new avenues for research.

Going forward, several unanswered questions are worthy of future research. First, the interplay of instrumental and expressive aspects of partisanship requires closer attention. What opportunities do partisans have to learn about their party’s issue and ideological positions? To what extent do politicians muddy the waters by espousing vague issue positions or stressing emotionally laden values and attitudes? Second, how large are the effects of social similarity on partisanship, and what are the limits to these effects? It is unlikely that simply sharing the ethnicity or gender of a political candidate in the absence of common political beliefs is sufficient to reshape partisan identity. But when does this kind of similarity matter? And are its effects mediated by assumed common interests or support for policy issues that benefit group members? Third, does expressive partisanship always trump instrumental considerations? Not surprisingly, someone with a strong partisan identity will feel elated after an election victory and depressed after defeat. But party status is less likely to be affected by a single legislative victory or defeat because it does not alter the formal balance of partisan power and status. At these times, between elections, other identities and political considerations may drive political involvement and action, based on concerns about a specific issue or event.

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### Notes:

(1.) For example, partisans who feel ambivalent about their party (feeling a strong attachment but holding viewing beliefs) fit the expectations of an instrumental model, whereas partisans who lack such ambivalence more strongly resemble expressive partisans (Lavine et al., 2012).

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