RATIONAL MOBILIZATION OF IDEOLOGICAL GROUP MEMBERS IN ELECTIONS: THEORY AND EVIDENCE∗

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This draft: May 18, 2015

ABSTRACT

We re-examine the link between group membership and turnout. While recent theoretical work in the rational choice tradition emphasizes the importance of groups, such as political parties and informal social networks, for turnout, it has paid little attention to formal economic groups like labor unions. We argue that this has hampered scholars’ ability to make sense of unions’ electoral impact. Theoretically, we show that rational mobilization implies that the link between union membership and turnout varies by individual ideology and electoral competitiveness. This suggests that the common empirical approach of estimating the average union vote premium can lead to misleading inferences. Analyzing American national election surveys combined with state-level data between 1964 and 2008, we find strong evidence consistent with rational mobilization by unions. Competitiveness increases turnout among left-leaning union members rather than all members, and left-leaning but non-unionized individuals are less affected by competitiveness.

∗Previous versions of this paper were presented at the annual meeting of the American Political Science Association in Washington, D.C., August 2014, and in seminars at the University of Konstanz (October 2014), the University of Oxford (November 2014), and at the Central European University (May 2015). We thank all participants, as well as Elin Naurin, David Rueda, Lucio Baccaro, Michael Donnelly, Nolan McCarty, Jonas Pontusson, Tilko Swalve, and Thomas Gschwend for helpful comments and suggestions. Becher acknowledges financial support from the University of Konstanz through a YSF project grant. The usual disclaimer applies.
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I. INTRODUCTION

Labor unions are familiar actors in electoral politics, but they are not well understood. Who do rational union leaders mobilize in elections? When do they have incentives to exert significant mobilization effort? What are observable implications of strategic union behavior for turnout and what are its consequences for elections in times of declining union membership? To address these questions, we start by developing the argument that union leaders strategically mobilize ideological members in close elections. Our theory implies that the link between union membership and turnout varies by individual ideology and electoral competitiveness. Perhaps surprisingly, the relevance of this individual heterogeneity and context-dependency has been mostly neglected by the empirical literature on unions and voting. The formal model we employ to clarify the argument suggests that the common practice in existing research to focus on estimating the average effect of formal group membership on political participation can lead to misleading inferences. We provide new evidence consistent with central implications of this logic.

Turnout is a core issue in political science, and since the late 1980s rational choice theorists have turned their attention to groups in order to explain variation in turnout in large elections. They have analyzed the role of political parties as mobilizing agents (Aldrich 1993; Morton 1987; Nichter 2008; Shachar and Nalebuff 1999; Uhlaner 1989), ethical motivations in groups (Coate and Conlin 2004; Feddersen and Sandroni 2006), and informal social networks (Abrams et al. 2011). These group-based approaches, while differing in several interesting ways, offer a consistent account for why we observe that a significant number of citizens participate in mass elections despite an approximately zero probability that any individual voter is pivotal, and why aggregate turnout often increases with the competitiveness of the electoral contest. The rational choice perspective has paid considerably less theoretical attention to the impact of formal economic groups like labor unions. We argue that this omission has hindered the ability of social scientists to make sense of the electoral influence of these groups, which were not formed primarily for electoral purposes but regularly use their resources to get particular groups of citizens to vote. We focus on unions as agents of mobilization and explore, using theory and survey data, the mechanism of strategic mobilization by unions. Unions are an especially relevant group because they remain, despite decades of membership decline in many advanced democracies, one of the largest mass organizations in the electoral arena (Kim and Margalit 2014). As unions tend to favor particular economic policies and candidates of left-leaning parties, their influence on voting behavior remains potentially important for democratic representation (Schlozman et al. 2012).

The idea that unions are agents of electoral mobilization is not new and has spawned dozens of empirical studies. Electoral mobilization of its members is a central mechanism through which unions are thought to influence politics. By mobilizing citizens who, based
on their socio-demographic characteristics, have a lower propensity to vote, unions reduce inequality in political participation and representation (Leighley and Nagler 2007; Lijphart 1997; Schlozman et al. 2012). However, this literature has paid less attention to unions’ strategic calculus of mobilization and how it explains variation in the group-turnout link. This also matters when we consider the politically relevant question of the continuing electoral impact of unions. In the context of a significant decline in union membership in many advanced democracies (Visser 2013), this question has been examined by academics in political science, sociology and political economics. One widespread view is that changes in membership have dramatically curtailed the ability of unions to get out the vote, despite credit-claiming by union leaders to the contrary if their favored candidate wins. For instance, a recent comprehensive analysis of American data concludes that the “ability of unions to increase turnout among its membership has been drastically curtailed.” (Rosenfeld 2014: 163). More broadly, a meta-analysis of turnout studies published in ten top political science journals between 2000 and 2010 finds that “union membership and union density do not have a statistically significant effect on individual level turnout in most tests and studies.” (Smets and van Ham 2013: 351). A dissenting view is that unions remain a mobilizing force in the electoral arena, and some scholars have drawn on new data sources to bolster this claim (e.g., Flavin and Radcliff 2011; Francia 2012; Lamare 2010; Zullo 2008). What existing studies mostly neglect, regardless of their interpretation of the average impact of unions on turnout, is that rational mobilization implies that unions have clear incentives to strategically vary their mobilization efforts across individuals and elections. Our rational mobilization perspective suggests that average effects provide an incomplete picture of the mobilization mechanism and can lead to misleading inferences about the electoral impact of unions.

Our theory brings together the rational choice literature on turnout with the behavioral literature on the role of unions in elections. We propose a stylized model of rational mobilization of ideological members by a union leader interested in shaping the outcome of electoral competition in a majoritarian electoral system. Building on party-based models of rational mobilization (Aldrich 1993; Morton 1987, 1991; Shachar and Nalebuff 1999; Uhlaner 1989), our account considers a situation where individual turnout reflects considerations of costs, benefits, and norms that can be influenced through mobilization efforts. A strategic union leader interested in left (i.e., union-friendly) policies has incentives to target costly mobilization efforts towards left-leaning union members, especially when elections become more competitive. While a union may also try to reach non-members, it has a clear advantage in mobilizing its members: Leaders can rely on personal canvassing, personalized

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4Focusing on the ability of unions to reduce turnout biases, several studies have examined whether the membership-turnout link varies by individual characteristics such as income, education, race or type of employment (e.g., Kerrissey and Schofer 2013; Leighley and Nagler 2007; Rosenfeld 2010).
appeals, and social pressure, which have been found to be effective tools to get out the vote by a large and growing number of field experiments (e.g., Druckman and Green 2013; Gerber et al. 2008). Our theory highlights novel implications about differences in turnout based on union membership, ideology and competitiveness. Turnout among union members is predicted to increase as elections become more competitive and this context effect should be more pronounced for left members. Turnout among left non-members, on the other hand, should be less sensitive to competitiveness.

To test the empirical implication of our theoretical model we draw on survey data from the American National Election Study (ANES) covering 22 national elections between 1964 and 2008. Importantly, the data include the required measures of ideology, union membership, and turnout, which we complement with data on the competitiveness of elections at the state level. The historical and geographical scope of the data provides leverage to examine the predicted macro-micro interactions. Our empirical results reveal robust evidence consistent with rational mobilization. We find that competitiveness increases turnout predominantly among left-leaning union members rather than all union members. In substantive terms, a standard deviation increase in competitiveness increases turnout among left members by 5 percentage points – an effect large enough to influence the outcome when elections are competitive, which many are. In extended specifications, we also find that turnout among left non-members is fairly insensitive to competitiveness whereas turnout among right non-members increases with competitiveness. This is remarkably consistent, we argue, with rational mobilization on both sides of the political spectrum.

Our findings are robust to controlling for explanatory variables emphasized by party-based models of mobilization in the tradition of Aldrich (1993), Morton (1991) and Uhlaner (1989), as well as the informal social network perspective of Abrams et al. (2011). Party contact is a robust predictor of turnout, in line with the original Aldrich-Morton-Uhlaner framework, but does not drive the effect of union membership. Building on a tradition going back to at least Lazarsfeld et al. (1944), the rational informal social network perspective formulated cogently by Abrams et al. (2011) emphasizes that individual turnout decisions are largely shaped by the social interaction of like-minded individuals in small groups without any selective incentives provided by group leaders. Group members themselves reward and punish each other, thus creating social incentives to vote despite non-zero costs of voting and an infinitesimal probability of affecting the outcome. Political discussion is a key explanatory variable in this framework. Controlling for a measure of political discussion, we find our core prediction confirmed. To be sure, discussion remains a significant predictor of turnout. In that sense, our findings mirror those of Abrams et al. (2011) and bolster their interpretation that the mechanisms through which formal groups like unions and informal networks operate are at least partially distinct. We also believe that unions make use of informal social networks
in their mobilization efforts, though exploring the strategic interaction between political parties, unions, business groups, and informal social networks is a task for future research.

While the use of observational data requires the usual caution when interpreting the estimation results, we should note that the findings cannot be explained by standard accounts of self-selection into unions. Scholars investigating the links between groups and participation have long argued that the decision to join a group may well reflect a prior propensity to participate. Following a long tradition that emphasizes the importance of voluntary associations for citizens’ political participation (e.g., Verba et al. 1995), another explanation is that union members have higher political interest and higher civic skills as a byproduct of (active) membership. Reflecting these arguments, our theoretical model incorporates the possibility that there are systematic differences between members and non-members that may exist prior to any mobilization effort. What distinguishes our model from these accounts is that we highlight that the differences in turnout should be context-sensitive and vary by ideological orientation. Explanations based only on self-selection or endogenous skills tend to imply a constant turnout gap and do not explain why turnout among members varies by ideology and competitiveness.

II. THEORETICAL CONSIDERATIONS

Building on and extending party-based models of rational mobilization in large elections (e.g., Aldrich 1993; Morton 1991; Shachar and Nalebuff 1999; Uhlaner 1989), we begin by analyzing the problem of a strategic labor union that can exert mobilization effort to influence the turnout decision of citizens. The stylized set-up captures an important electoral channel through which unions can influence policy in a representative democracy. It allows us to ask how a change in the political environment, such as electoral competitiveness, changes the union’s incentive to mobilize and therefore affects turnout and election outcomes. Throughout, we compare results from our strategic perspective with a non-strategic benchmark based only on systematic differences (possibly unobserved by researchers) between union members and non-members. Later, we allow for counter-mobilization.

A. A basic mobilization model

*Individuals and groups* Suppose political competition over policy in a one-dimensional space takes place under a majoritarian, winner-take-all electoral system. The policy-motivated (or ideological) union leader (U) has an ideal point that is normalized to zero, $x_U = 0$. This can be thought of as a position in favor of labor market regulation and income redistribution. There are two mainstream parties (or candidates), left (L) and right (R), with policy positions
0 ≤ x_L < x_R.\textsuperscript{5} The expected utility of the union leader is based on the expected policy outcome, captured by a linear spatial utility function, and the cost of mobilization. Formally,

\[ U_U = -p_L|x_L| - (1 - p_L)|x_R| - c(\bar{m}) \] (1)

where \( p_L \) is the endogenous probability that party L wins the election, \( 1 - p_L \) is the complementary probability that party R wins the election, \( c(\bar{m}) \) is a twice-differentiable convex cost function that captures \( U \)'s costs of exerting mobilization effort, and \( \bar{m} \geq 0 \) (\( \bar{m} \) is the weighted sum of per capita mobilization efforts across groups defined below). In particular, we assume \( c(\bar{m}) = -\frac{1}{2}\bar{m}^2 \).

The population consists of a large number of citizens. The overall size of the population is unity. Citizens care about the outcome of the election. A citizen's party preference can be based on policy consideration, reflecting which party is closer to her in the policy space, as well as non-policy consideration, such as valence. As the probability that any individual is pivotal in a mass election is effectively zero, an individual's turnout decision is driven by non-instrumental considerations such as opportunity and information cost and civic duty that are amenable to get-out-the-vote mobilization at the margin (Aldrich 1993). Some citizens are labor union members, others are not. As we will see, union membership conditions the ability of elites to mobilize particular groups. With respect to party preferences, union members may be heterogeneous: while some members prefer party L, others favor R. The same is true for non-members. To capture this in the model, we require a bit more notation. Denote union membership by subscript \( g \in \{u, n\} \), where \( u \) indicates union members and \( n \) indicates non-members. The exogenous fraction of union members in the population is \( k \in (0, 1) \). Citizens' party preferences, for L or R, are denoted by subscript \( p \in \{l, r\} \). The share of L supporters among union members is \( l_u \) and the share of L supporters among non-members is \( l_n \). Hence, there are four mutually exclusive and jointly exhaustive groups of potential voters defined by union membership, \( g \), and party preference, \( p \). This set-up differs from previous mobilization models, which focus only on differences in party preferences. The number of union members favoring L is \( kl_u \), the number of union members favoring R is \( k(1 - l_u) \), the number of non-members favoring L is \( (1 - k)l_n \), and the number of non-members supporting R is \( (1 - k)(1 - l_n) \). We know from empirical studies that union members have heterogeneous preferences but are, on average, more likely to support left policies and parties than non-members (Rosenfeld 2014: 176). So the realistic restriction we impose on the distribution of preferences is that the fraction of L supporters is weakly higher among union members than non-members: \( l_u \geq l_n \).

To capture the idea that individual turnout is not a strategic choice but rather a decision based on a comparison of non-instrumental benefits and costs, we assume a citizen \( i \) turns

\textsuperscript{5}Allowing for multiple policy dimensions does not change the argument.
out to vote if $\gamma_{g,p}(m_{g,p}) + \delta + \alpha_{g,p} > c_i$, where $c_i$ is the citizen’s idiosyncratic cost of voting (e.g., opportunity or information cost) that is not observed by politicians and assumed to be uniformly distributed on the unit interval. Aggregate shocks influencing turnout, such as weather (e.g., Hansford and Gomez 2010), are captured by $\delta$. The mobilization effort of the union for a particular group is captured by the function $\gamma_{g,p}(m_{g,p})$, which we discuss in more detail below. Finally, $\alpha_{g,p}$ are group specific parameters that allow for pre-existing group differences in the propensity to vote, which are unrelated to the union’s mobilization effort. These capture self-selection based on, for example, cognitive ability or political interest. They may also reflect the participatory effects of civic skills acquired as a by-product of group membership (Verba et al. 1995). Accounting for these differences allows us to highlight where our predictions based on a strategic mobilization model depart from non-strategic accounts purely based on systematic differences between citizens’ propensity to vote. The existing literature is most concerned with the possibility that union members differ systematically from non-members. Thus, we abstract from other differences and assume that $\alpha_{u,l} = \alpha_{u,r} = \alpha_u$ and $\alpha_{n,l} = \alpha_{n,r} = \alpha_n$, in other words, we allow for pre-existing systematic turnout differences between union members and non-members.

**Mobilization choice** The union leader makes the mobilization decision before the election and thus before individual and aggregate shocks are realized.\(^6\) Given the uniform distribution of individual turnout cost, expected turnout among a group of individuals defined by their union membership and partisan preference is

$$Pr(\gamma_{g,p}(m_{g,p}) + \delta + \alpha_{g,p} > c_i) = F(\gamma_{g,p}(m_{g,p}) + \delta + \alpha_{g,p}) \equiv \Pi_{g,p}$$

(2)

where $F(\cdot)$ is the cumulative distribution function of the individual cost. Expected turnout $\Pi_{g,p}$ is a random variable, since $\delta$ is a random shock. Here we assume that the aggregate turnout shock $\delta$ is distributed uniformly on $\left[-\frac{1}{2\phi}, \frac{1}{2\phi}\right]$. Thus the mean is zero and the variance decreases as $\phi$ increases. The left party wins the election if it wins a plurality of votes. Given these assumptions, the probability of a left victory is

$$p_L = \Pr[kl_u\Pi_{u,l} + (1-k)l_n\Pi_{n,l} > k(1-l_u)\Pi_{u,r} + (1-k)(1-l_n)\Pi_{n,r}]$$

$$= \Pr[\Delta > -\delta B]$$

(3)

\(^6\)Note that the model does not assume a voting-reward contract between leaders and group members, which is difficult (or impossible) to enforce in institutionalized democracies where the ballot is secret and vote buying is illegal (Abrams et al. 2011: 234; Feddersen 2004: 106). Consistent with many studies of effect of get-out-the-vote campaigns (Green and Gerber 2008), the model captures that the ability of union leaders to provide selective incentives before the election (rather than rewards after) does not require them to monitor voters’ behavior. An important part of get-out-the-vote efforts is about reducing the cost of voting and they, similar to coupons that reduce the price potential customers need to pay for a product, may be disregarded (Aldrich 1993: 267).
where $B$ is the exogenous balance of partisan support in the population and $\Delta$ is the endogenous balance of partisan support among voters. A positive (negative) value of $B$ or, respectively, $\Delta$, indicates that the partisan balance is tilted toward party L (R). Formally, $B \equiv 2(kl_u + (1 - k)l_u) - 1$ and $\Delta \equiv kl_u \gamma_{u,l} + (1 - k)l_n \gamma_{n,l} - k(1 - l_u)\gamma_{u,r} - (1 - k)(1 - l_n)\gamma_{n,r} - \alpha_u k(1 - 2l_u) - \alpha_n (1 - k)(1 - 2l_n)$.

Until now we have been silent about the mobilization technology represented by $\gamma_{g,p}(m_{g,p})$. This part is crucial and requires some discussion. We make two substantive assumptions that are informed by the empirical literature. First, we assume that unions can target left party supporters. This reflects the view in the mobilization literature that parties and other political groups are pretty good at identifying likely supporters, and focus on getting them to the polls (e.g., Green and Gerber 2008: 4). Second, unions are better at mobilizing their members than non-members. There are several reasons for this. To begin with, members provide a clearly identifiable and accessible list of targets that belong to a common group and share a professional link to the group leadership. This means, for example, that union organizers can make use of personal canvassing, or at least use personalized voting appeals from group leaders – methods that have been found to be effective in raising turnout (Druckman and Green 2013). Moreover, historically, campaign finance legislation has restricted direct contributions of unions (as well as business groups) to campaigns or candidates but not spending on partisan voter-registration and get-out-the-vote drives among members as well as non-partisan mobilization efforts among the general public (Masters 2004). Finally, close-knit workplace networks with repeated interactions make it easier to disseminate information, organize voter registration or voting day transportation, and use social pressure to enforce norms of participation (on the latter, see for instance Druckman and Green 2013; Gerber et al. 2008).

The second assumption does not mean that unions are unable to reach out to non-members, but that they will be somewhat less effective in doing so. Capturing these considerations, for convenience we assume a simple linear mobilization technology with varying coefficients. Hence, $\gamma_{u,l} = e_u m_{u,l}$, $\gamma_{n,l} = e_n m_{n,l}$, $\gamma_{u,r} = e_u m_{u,r}$ and $\gamma_{n,r} = e_n m_{n,r}$ where $m_{g,p} \geq 0$ denotes the mobilization effort by the union for a group and coefficients are larger for members than non-members ($e_u > e_n > 0$). Realistically, the mobilization technology cannot achieve 100% turnout. To solve the problem of the union leader, we substitute the probability of a left victory given the mobilization strategy, equation (3), into the leader’s utility function, equation (1), and find the mobilization effort for each group that maximizes the leader’s expected utility.

**Predictions** This basic model elaborates the intuition that the union leader has incentives to strategically mobilize some citizens but not others in order to influence the balance of

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7Formally, for left-union members this requires $e_u < \sqrt{\frac{\nu}{\phi d}} (1 - \frac{1}{2p} - \alpha_u)$. 

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partisan support among voters. Here we focus on the observable implications of this logic. The formal derivation is in Appendix A. Rational mobilization implies that the relationship between union membership and turnout depends on ideology and electoral context. It also predicts context-specific variation in the union vote premium.

The union leader has incentives to target the union’s mobilization efforts on left-leaning union members where the electoral stakes are high. Figure 1 illustrates empirical implications of this logic and compares them to a non-strategic baseline given a situation of comparatively low union membership (15%, close to the average in the data set we use later). Throughout, the focus is on electoral competitiveness as one important context variable, which also features prominently in party-based accounts of mobilization. In the model, we say that an election is competitive if the distribution of partisan support in the population is fairly balanced (i.e., the absolute value of $B$ is small).

We begin by characterizing turnout in each of the four groups without mobilization. There are multiple explanations for why, on average, union members tend to be more likely to vote than non-members. We have already alluded to some of them. Some scholars argue that union members self-select into unions based on, at least in part, higher propensity to participate in politics (Freeman 2003). Following the seminal work of Verba et al. (1995), union members might also be more likely to participate in politics because the have acquired civic skills as a byproduct of membership in a voluntary association (also see Almond and Verba 1963: ch. 11). All of these mechanisms may be at work. On their own, they imply a more or less constant turnout gap between members and non-members for varying levels of competitiveness. Given the extensive literature, we consider this to be a relevant baseline prediction. Panel (a) of Figure 1 illustrates the non-strategic baseline for the case when union members have a higher propensity to vote ($\alpha_u > \alpha_n$).

Next, consider mobilization by the union leader. The mobilization model does not dispute the relevance of the non-strategic mechanisms just discussed. Rather, it incorporates them explicitly (via the $\alpha$-terms). Going beyond the baseline, rational mobilization implies that group differences in turnout vary by ideology and competitiveness. This is illustrated by panel (b) in Figure 1. As the election becomes more competitive, mobilization increases turnout among left-leaning union members and thereby the turnout difference between union members and non-members. In a competitive election, a marginal increase in mobilization effort targeted at left supporter leads to a significant increase in the probability of a left victory (recall equation 3). Because union members can be targeted more effectively, mobilization effort is focused on left members rather than all left supporters. When competition is low, the leader’s incentive to undertake costly mobilization are low. As competition increases, narrowing the margin to 10 percent or less given the parameter values underlying Figure 1,

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8  The figure is based on the following parameterization: $k = 0.15, l_u = 0.55, l_n = 0.45, d = 2, \phi = 1, \alpha_u = 0.4, \alpha_n = 0.35, e_u = 0.02, e_n = 0.015, f_u = 0.015, f_n = 0.03$
Figure 1: The impact of competitiveness on turnout across groups: comparative static predictions of the basic and extended mobilization model compared to a non-strategic baseline capturing systematic differences between members and non-members not driven by mobilization (e.g., self-selection). Competitiveness refers to the partisan balance among eligible voters ($B$). Competitiveness increases as the term approaches 0.
the model predicts that turnout among union members increases substantively relative to that of non-members. The difference is generated by higher turnout of left-leaning union members, not union members in general. This is a result of targeting. Therefore, the turnout gap should be most pronounced if one compares left-leaning members with non-members. While turnout among left-union members is quite sensitive to electoral competitiveness, that of right-leaning members as well as non-members is less so. The twin implications of context-sensitivity and union heterogeneity are summarized by Prediction 1.9

**Prediction 1** The expected difference in turnout between left union members and non-members increases, other things being equal, when electoral competitiveness increases. Turnout of right union members is less sensitive to competitiveness than that of left members.

These predictions do not follow from the existing literature on unions and turnout and they differ from existing group-based theories of voting in the rational choice tradition. Group-based models of mobilization, building on the foundational work of Uhlaner (1989) and Morton (1991), have analyzed groups that are only defined by partisan preferences. Our mobilization model explicitly builds on this framework and recovers the basic prediction that competitiveness and turnout are linked at the aggregate level. In addition, it predicts systematic variation in turnout among citizens that support the same party based on whether they are a union member or not. In the same competitive electoral context and holding socio-demographics constant, a left-leaning individual should be more likely to vote if he is a union member than if he is not. As explained above, this gap should increase as the election becomes more competitive. The model also predicts variation in the behavior of left and right union members facing the same electoral context.

**B. Counter-mobilization**

Before we turn to the data, let us consider the possibility that the union faces a player mobilizing supporters of the right party. We call this player the conservative agent. We can think of it as, say, a business-sponsored group that relies on professional get-out-the-vote campaigns. The ideal point of the conservative agent is on the right of the political spectrum,  \( \hat{x}_C \geq x_R \). The agent’s expected payoffs are

\[
U_C = -p_L|x_L - \hat{x}_C| - (1 - p_L)|x_R - \hat{x}_C| - c(\bar{m}^C).
\]

9The model deliberately focuses on strategic mobilization given party positions (similar to Abrams et al. 2011; Shachar and Nalebuff 1999). Analyzing the choice of party positions goes beyond the scope of the paper. In line with arguments emphasizing the difficulties parties face in credibly changing the positions, we typically neither observe full convergence of political parties at the national level nor of candidates at the district level (e.g. Ansolabehere et al. 2001; Lee et al. 2004). This is consistent with our assumption and implies a positive mobilization effort.
Now the probability of a left victory, $p_L$, is endogenous to the mobilization effort of both the union and the conservative agent. Both choose their mobilization efforts simultaneously and before turnout shocks are realized. While the union is at least somewhat better at influencing members rather than non-members, there is no reason to believe that the same holds for the conservative agent. The starting point is that the conservative agent is better at increasing participation among those not in a union. We denote the mobilization coefficient of the conservative agent as $g > 0$. Thus we have the following mobilization functions for each of the four groups of citizens:

\[
\begin{align*}
\gamma_{u,l} &= e_u m_{u,l}^U + f_u m_{u,l}^C, \\
\gamma_{n,l} &= e_n m_{n,l}^U + f_n m_{n,l}^C, \\
\gamma_{u,r} &= e_u m_{u,r}^U + f_u m_{u,r}^C, \\
\gamma_{n,r} &= e_n m_{n,r}^U + f_n m_{n,r}^C.
\end{align*}
\]

In equilibrium, the union leader targets mobilization effort on left-leaning union members and the conservative agent targets mobilization effort on right-leaning individuals that are not union members (the proof is in Appendix A). This confirms a key result of the basic mobilization model and suggests an additional empirical implication. As before, left-union members will vote at higher rates when the election becomes more competitive whereas right union members and left non-members are less sensitive to competitiveness. As a consequence of rational counter-mobilization, however, non-unionized right-leaning individuals should also vote at higher rates when the election becomes more competitive. Panel (c) in Figure 1 illustrates this pattern.

**Prediction 2** Suppose the union mobilizes supporters of party $L$ and there is a conservative agent mobilizing supporters of party $R$. Then the comparative statics described in Prediction 1 hold if the union’s advantage in mobilizing its members is sufficiently large.

This means that despite counter-mobilization on the right, the predictions about turnout differences derived from the basic model hold as long as the union’s comparative advantage in mobilizing members relative to non-members is sufficiently large (Prediction 2). The result does not generally require that the union is actually better than the conservative group at mobilizing its members (though this is plausible). Thus, explicitly accounting for counter-mobilization highlights a plausible substantive condition for the intuitive predictions derived from the basic model and confronted with the appropriate data in the next section. In addition, it suggests that ideology also matters among non-members.\(^\text{10}\)

### III. EMPIRICAL STRATEGY

We test the key implications of our theoretical model using a macro-micro modeling strategy. Lacking long-term panel data on individuals’ union membership and turnout, we turn to a repeated cross-section design, where we observe cross-sections of individuals

\(^\text{10}\)Note that the underlying claim about the behavioral responses of the four groups to competitiveness holds regardless of whether this condition holds.
experiencing elections of differing degree of competitiveness over time. The goal of the analysis is to estimate how groups defined by union membership and ideology respond to state-level variation in electoral competitiveness.

A. Data

We use 22 repeated cross-sections from the American National Election Study (ANES), conducted between 1964 and 2008, matched with measures of electoral competitiveness. We limit our sample to males of working age (20–65 years), in order to model a more homogeneous data generating process. This leaves us with a sample size of 13,436 individuals. A full joint model of men and women would need to take into account the endogeneity of female labor market participation and union membership, which is beyond the scope of this paper.

Ideological union members To capture the implications from our model, we need indicator variables for ideological union members, or, in other words, left (leaning) and right (leaning) members of unions. The ANES contains an indicator of respondents’ union membership in each wave. To capture ideology of union members we rely on the ‘classical’ party identification item, which asks respondents to classify themselves as either strong or weak Democrat or Republican, or as independent (Independent Democrat, Independent Republican, or Independent). Party identification is the appropriate measure, since we want to capture stable ideological positions, instead of short-term measures of political or partisan attitudes (Green et al. 2004). We classify union members as left if they declare themselves to be either strong or weak Democrats (ignoring independents as non-ideologues), and as right if they self-classify as strong or weak Republicans. In our sample of working-age males, 9.4% are left union members, while 3% are union members on the right of the political spectrum.

Competitiveness Our measure of competitiveness is an ex post measure based on election outcomes, which is used in the majority of political science applications (e.g., Caldeira et al. 1985; Cox and Munger 1989; Geys 2006; Fraga and Hersh 2010; Engstrom 2012). The construction of the measure follows Leighley and Nagler (2007), who calculate competi-

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11While long-term panel data on union membership does exist, notably the National Longitudinal Study of Youth, it does not provide repeated observations on turnout.
12The ANES is our preferred survey since it provides the required measures for union membership and ideology, as well as covariates. One drawback of the ANES is that, as in virtually every self-report, respondents over-report their turnout (e.g., Traugott and Katosh 1979). While over-reporting creates the possibility of bias in every analysis, we have no a priori expectation that over-reporting varies systematically with our hypothesized mobilization–ideological union member interaction.
13But note that this sample selection is not what drives our empirical results presented below. As a robustness check we reestimated our model on a pooled sample of men and women. We find our main effects slightly weakened, but still highly significant (both in the statistical and substantive sense).
tiveness as the log of the reciprocal of the difference in the two-party vote share.\textsuperscript{14} The transformation captures the curvilinear increase in the incentives to mobilize suggested by the theory (see Figure 1).

Note that actual closeness correlates highly with whether a state was initially considered a “battleground” by at least one of the campaigns (Fraga and Hersh 2010: 347). There are several advantages of using realized closeness for our purposes. Compared to a simple battleground indicator, actual closeness contains more information. The theoretical model suggests that incentives for mobilization increase non-linearly in closeness. Compared to available ex ante predictions of state-level vote margins (Campbell et al. 2006), the ex post measure is better at capturing closeness in turbulent political times including, for instance, partisan realignment. Moreover, ex ante measures do not capture campaign effects by design. This is desirable for some purposes (such as studying campaign behavior), but not for ours. We know that union organizers facing the difficult decision of how to allocate scarce resources do pay a lot of attention to the campaigns run by political parties (Asher et al. 2001: 74-5). As actors trying to influence the election outcome, they do not only care about economic fundamentals or presidential popularity but also about whether their preferred party appears to run a competent campaign in a given state as well as other idiosyncratic features of the race. In other words, unions have more incentives to be well-informed than average voters.

Controls To capture systematic differences between individuals we include a number of controls. We restrict this set to pre-treatment variables and do not include variables that are likely to be consequences of, or correlated with, ideological union membership. In doing so, we also avoid the dangers of “garbage can regression” models (Achen 2005). We include respondents’ age (in years) and education (holding a college degree or beyond), as well as income (in quintiles). While income could be thought of as a consequence of union membership (i.e., reflecting a union wage premium), we include it nonetheless in order to capture systematic differences in material interests of union members. The theoretical mechanism we are interested in concerns mobilization for a given income. Finally, we account for the known fact that turnout is higher in presidential elections than in midterms, by including an indicator variable for the former. Furthermore, we test the stability of our specification against a number of alternative explanations (such as party mobilization, “right to work” legislation, or the role of political discussion in informal social networks), which we discuss later.

\textsuperscript{14}Formally, competitiveness = \text{log}(1/\text{abs}(s_D - s_R)), where s_D and s_R are Democratic and Republican vote shares, respectively. Leighley and Nagler (2007) assign a value of -7 when no election takes place (we checked that alternative choices of -6 or -8 do not produce qualitatively different results). For concurrent presidential and senate elections we use the maximum value of both competitiveness measures. As a robustness test we repeat our analyses using the mean of both competitiveness measures and obtain the same substantive results.
B. Statistical specifications

Our analysis is done in a fully Bayesian framework (e.g., Gill 2014). This choice is attractive because we are working with the complete population of US states (Jackman and Western 1994). In this context, Bayesian measures of uncertainty are conditional on the observed data only, instead of trying to generalize to a super-population (cf. Jackman 2009: ch.1).

We denote by \( y_{ist} \) turnout of individual \( i \) \((i = 1, \ldots, N_st)\) living in state \( s \) \((s = 1, \ldots, S)\) at survey wave \( t \) \((t = 1, \ldots, T)\). Since turnout is dichotomous we employ a logit specification.\(^{15}\)

Following our basic theoretical model, next to a vector of controls \( x_{it} \), the basic regression equation contains five central inputs. They include the measure of competitiveness of an election in state \( s \) in wave \( t \), denoted by \( w_{st} \), and indicator variables for ideological union members, denoted by \( u_{L_{it}} \) and \( u_{R_{it}} \) for left and right union members, respectively. Our theoretically central factor is the differential mobilization of left and right union members, given by the macro-micro interaction terms, \( u_{L_{it}}w_{st} \) and \( u_{R_{it}}w_{st} \). Thus, our regression equation is given by:

\[
y_{ist}^* = x_{it}' \beta + \gamma_1 w_{st} + \gamma_2 u_{L_{it}} + \gamma_3 u_{R_{it}} + \gamma_4 u_{L_{it}}w_{st} + \gamma_5 u_{R_{it}}w_{st} + \alpha_s + \epsilon_{ist} \quad (5)
\]

Here \( \beta \) captures the influence of pre-treatment controls, while \( \gamma_1 \) to \( \gamma_5 \) capture our central factors of interest. Equation (5) also includes state-specific constants \( \alpha_s \), in order to capture time-constant systematic differences between states (such as culture, a “union-friendly climate”, etc.). Since, due to the design of the ANES, states are represented by quite different sample sizes, we employ a random effects or shrinkage estimation strategy, where state-specific constants from states with smaller sample sizes are shrunken towards the overall mean (e.g., Jackman 2009: ch.7). This is achieved by drawing each \( \alpha_s \) from a common normal distribution with mean zero and variance estimated from the data: \( \alpha_s \sim N(0, \sigma^2) \).

By default this random effects logit model assumes that state-specific constants and regressors are independent.\(^{16}\) In our second specification we relax this assumption by employing the correlated random effects specification suggested by Mundlak (1978). The core idea is to model the dependency of state-constants and regressors via the following projection:

\[
\alpha_s = \bar{z}_{s}' \omega + \xi_s, \quad \xi_s \sim N(0, \sigma^2_{\xi}), \quad (6)
\]

\(^{15}\)More precisely we use a latent index model (Albert and Chib 1993), where a continuous variable is specified to drive observed discrete choices, such that \( y_{ist} = 1 \) if \( y_{ist}^* > 0 \) and 0 otherwise. This latent variable is the left hand side variable of a linear regression, with residuals set to follow a logistic distribution, yielding a Bayesian logit model.

\(^{16}\)This stringent assumption is often presented as the argument for using random effects over fixed effects models. However, these two perspectives can be subsumed in a more encompassing framework. See Crépon and Mairesse (2008) for an extended discussion.
where $\alpha_s$ are expressed as a function of a set of time-constant state characteristics, $\bar{z}_s$, with coefficient vector $\omega$, and $\xi_s$ are now orthogonal random effects (cf. Hsiao 2003: 46; Crépon and Mairesse 2008). Substituting equation (6) into (5) yields our specification of the correlated random effects logit model:

$$y^*_{ist} = x_{it}' \beta + \gamma_1 w_{st} + \gamma_2 u_{it}^L + \gamma_3 u_{it}^R + \gamma_4 u_{it}^L w_{st} + \gamma_5 u_{it}^R w_{st} + \bar{z}_s' \omega + \xi_s + \epsilon_{ist}$$

(7)

with $\bar{z}_s$ set to state averages for all covariates, i.e., $\bar{z}_s = (\bar{x}_s, \bar{u}_s, \bar{w}_s)$.

To discuss our third and final specification, note that while the shrinkage property of our random effect models is sensible given the data, some may object to its bias-variance trade-off (the model trades in some bias in random effects estimates for a reduction in variance; for a discussion see Jackman 2009: 308f.). The alternative is a “fixed effects” specification, or more precisely a setup without shrinkage of state-specific constants. In the Bayesian framework this amounts to setting up a prior that does not specify each $\alpha_s$ as arising from a common distribution, but rather treating all $\alpha_s$ as idiosyncratic, unrelated coefficients with possibly large variance. For a more detailed discussion of classical “fixed” and “random” effects in a Bayesian setup see Rendon (2012). Thus, in our final specification, we set $\forall s: \alpha_s \sim N(0, 1000)$ – yielding “no-shrinkage” or “fixed state effects” estimates. To complete the Bayesian model specification we assign non-informative priors to all remaining coefficients.

IV. RESULTS

The resulting estimates are displayed in Table 1. Shown are summaries of the posterior parameter distributions in form of posterior means, and standard deviations, as well as 90% highest posterior density regions. Column (RE) shows results from our random effects logit model, while column (CRE) shows the correlated random effects specification. Finally, column three, (FE), shows “no-shrinkage” estimates.

---

17Note that the assumption of normally distributed effects can be relaxed and is of little consequence for our results. In a robustness check, we allowed for more extreme values in state-specific constants using t-distributed random effects (cf. Stegmueller 2013, Gelman et al. 2004: 446).

18Details are in Appendix C, where we also perform checks to show that these choices do not influence results. All models can be estimated via Gibbs sampling, using the auxiliary variable strategy outlined by Holmes and Held (2006) to sample the latent $y^*$. We ran this sampler, implemented in JAGS 3.3.0, for 20,000 iterations, after a transient phase of 4,000 samples, keeping every 4th sample. Standard diagnostics (Cowles and Carlin 1996) did not indicate any absence of convergence. Thus all reported results are based on 5,000 samples from the posterior probability distribution of each parameter.

19These can be thought of as Bayesian equivalents to classical estimates, standard errors, and confidence intervals. These confidence intervals actually can be interpreted as region of confidence, i.e. the 95% probability that the estimated parameter lies in this region (Jaynes 1976: 260).
Table 1: Estimates for mobilization model. Posterior means, standard deviations, and 90% highest posterior density regions

<table>
<thead>
<tr>
<th></th>
<th>RE</th>
<th>CRE</th>
<th>FE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitiveness</td>
<td>0.027</td>
<td>0.027</td>
<td>0.027</td>
</tr>
<tr>
<td></td>
<td>(0.012)</td>
<td>(0.012)</td>
<td>(0.012)</td>
</tr>
<tr>
<td></td>
<td>[0.006, 0.046]</td>
<td>[0.008, 0.047]</td>
<td>[0.006, 0.046]</td>
</tr>
<tr>
<td>Left union member</td>
<td>0.787</td>
<td>0.782</td>
<td>0.787</td>
</tr>
<tr>
<td></td>
<td>(0.134)</td>
<td>(0.138)</td>
<td>(0.135)</td>
</tr>
<tr>
<td></td>
<td>[0.555, 0.993]</td>
<td>[0.554, 1.008]</td>
<td>[0.564, 1.004]</td>
</tr>
<tr>
<td>Right union member</td>
<td>0.381</td>
<td>0.373</td>
<td>0.367</td>
</tr>
<tr>
<td></td>
<td>(0.229)</td>
<td>(0.232)</td>
<td>(0.230)</td>
</tr>
<tr>
<td></td>
<td>[0.022, 0.771]</td>
<td>[−0.003, 0.763]</td>
<td>[−0.020, 0.730]</td>
</tr>
<tr>
<td>Competitiveness × Left</td>
<td>0.091</td>
<td>0.091</td>
<td>0.092</td>
</tr>
<tr>
<td>union member</td>
<td>(0.032)</td>
<td>(0.033)</td>
<td>(0.033)</td>
</tr>
<tr>
<td></td>
<td>[0.037, 0.143]</td>
<td>[0.039, 0.146]</td>
<td>[0.041, 0.148]</td>
</tr>
<tr>
<td>Competitiveness × Right</td>
<td>−0.027</td>
<td>−0.027</td>
<td>−0.029</td>
</tr>
<tr>
<td>union member</td>
<td>(0.058)</td>
<td>(0.058)</td>
<td>(0.058)</td>
</tr>
<tr>
<td></td>
<td>[−0.122, 0.066]</td>
<td>[−0.123, 0.067]</td>
<td>[−0.125, 0.065]</td>
</tr>
</tbody>
</table>

Note: Based on 5,000 MCMC samples. Controls include age, education, income quintiles, and an indicator variable for presidential elections. All models include state-specific constants, $a_s$. Full table of estimates available in Appendix table B.1.
To begin with an established finding, all three models show that on average turnout is higher in more competitive elections. This is indicated by the positive estimate on the competitiveness coefficient (with a posterior density interval that excludes zero). Note that this result is net of the effect of presidential versus midterm elections, which we include as control, and the mobilization effort among union members. In substantive terms, a standard deviation increase in competitiveness increases turnout by $1.1 \pm 0.5$ percentage points.\(^{20}\)

Looking at turnout among ideological union members, we find that both left and right union members are more likely to show up at the polls than “middle of the road” union members or non-members. However, most of the action is among left union members: their turnout differential is twice as large as that of right union members. Furthermore, only those union members with left ideology are systematically different from the reference group: their posterior density region is clearly bound away far from zero, while the density region for right union members overlaps with zero in both the correlated random effects and fixed effects specifications. In other words, we find a substantively and statistically significant effect of ideological union membership on turnout among the left, while the evidence is much more limited for right union members.\(^{21}\)

A central test for our theoretical argument is the differential mobilization of left and right union members, as captured by coefficients $\gamma_4$ and $\gamma_5$. In line with key implications of the rational model of union mobilization, we find starkly differing results between left and right union members. There is a systematic and strong effect of electoral competitiveness on turnout among left union members: in more competitive elections, left union members are more likely to go to the polls. This finding is both substantively and statistically relevant: a standard deviation increase in closeness is associated with an increase in turnout among left union members of $5.4 \pm 1.5$ percentage points. This result is robust against other specifications (as we show below), and is consistently obtained both under random and “fixed” effects specifications (see columns CRE and FE of Table 1). In contrast, there is virtually no competitiveness effect among right union members. More precisely, we find a coefficient estimate of close to zero with large posterior uncertainty in all three model specifications. Consequently, a standard deviation in closeness is associated with an insignificant change in turnout among right union members of $0.12 \pm 2.4$ percentage points.

In order to visualize the effect of competitive elections on turnout of ideological union members, we calculate predicted probabilities of turnout among left union members. We keep all control variables at average values, and only vary levels of competitiveness. Results of this calculation are displayed in Figure 2. It displays mean predicted probabilities together

\(^{20}\)For this, and all following predicted probability calculations, all remaining variables have been held at their respective means.

\(^{21}\)In terms of probabilities, left union membership increases turnout by $13.4 \pm 1.9$ percentage points. The corresponding turnout increase among right union members is $7 \pm 4$ percentage points (holding control variables at means, and mobilization at zero).
Figure 2: Predicted probability of turnout among left union members at deciles of competitiveness. Displayed are posterior means and 90% highest posterior density regions.

with 90% confidence regions. It displays in more visual form the results found in Table 1: increasing competitiveness raises turnout among left union members quite dramatically. Even when concentrating on realistic increases in competitiveness, such as moving from the fifth to the eighth decile, we find an increase in turnout by more than four percentage points – a margin quite relevant in competitive elections. Taken together, these results closely match the macro-micro implications of our basic mobilization model (recall panel (b) of Figure 1). At this point, it is noteworthy that many elections in our data were competitive at the state-level. Competitiveness for the median survey respondent corresponds to a two-party vote margin of about 10 percentage points. At the 90th percentile, the vote margin is less than two points, indicating an election that is too close to call.

A. Extension to four ideological groups

The previous statistical models were simplified to focus on the main contrast between left and right union-member and the rest of the voting population. In this subsection we estimate a full model with all four possible ideological groups – left and right union members, as well as left and right non-members. This more demanding specification allows us to examine an additional prediction from our extended mobilization model, which accounts for mobilization on both sides of the political spectrum. Thus the statistical model given in equation (5) is extended by four new parameters. We include two level effects (or constituent terms) for left and right non-members with associated coefficients $\gamma_6$ and $\gamma_7$, respectively. The interaction
Table 2: Competitiveness effects in extended model. First differences in predicted probabilities of a standard deviation change in competitiveness. Percentage points. Displayed are posterior means and 90% highest posterior density regions.

<table>
<thead>
<tr>
<th>Competitiveness effect</th>
<th>Posterior Mean</th>
<th>90% Highest Posterior Density</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left union member</td>
<td>5.72</td>
<td>[3.15, 8.47]</td>
</tr>
<tr>
<td>Right union member</td>
<td>-0.01</td>
<td>[-4.54, 4.46]</td>
</tr>
<tr>
<td>Left non-member</td>
<td>0.41</td>
<td>[-1.17, 1.89]</td>
</tr>
<tr>
<td>Right non-member</td>
<td>3.17</td>
<td>[1.28, 5.03]</td>
</tr>
</tbody>
</table>

Note: Calculated from estimates in Table B.2, specification (RE). Based on 5,000 MCMC samples.

between competitiveness and ideological group membership for left and right non-members is represented by $\gamma_8$, and $\gamma_9$. From the extended theoretical model, displayed in panel (c) of Figure 1, we expect that both right union members and left non-members are not primary mobilization targets and thus have coefficients $\gamma_5$ and $\gamma_7$ close to zero. In contrast, if right non-union-members are targeted by a counter-mobilizing group, we expect to find a positive interaction. The new prediction is that right non-union members should be sensitive to the closeness of the election as well.

A complete table with estimates is available in Appendix Table B.2. As before, results from correlated random effects and fixed effects specifications provide the same substantive conclusions. We estimate competitiveness-ideology interactions for right union members and left non-members that are statistically indistinguishable from zero. For right members, on the other hand, we find a larger, significant coefficient. To better convey the substantive meaning of these estimates, we calculate quantities of interest displayed in Table 2. It shows first differences in predicted turnout probabilities resulting from a standard deviation increase in competitiveness (the baseline is the average level of competitiveness, all control variables are held at their means). In accordance with previous results from our simplified model we find that an increase in competitiveness raises turnout among left union members by more than five percentage points, while it has virtually no effect on right union members. Our results for ideologues who are not union members are illuminating. We find that increasing competitiveness does not lead to a substantive increase in turnout of left non-members, as predicted in our counter-mobilization model. Contrarily, and consistent with the prediction
based on counter-mobilization, increasing electoral competitiveness goes hand in hand with an increased turnout probability of right non-members.

B. Alternative explanations

Given our observational research design, we can of course never completely rule out that our findings are the result of some unobserved factor. However, plausible arguments in the literature about endogeneity due to self-selection into unions are already accounted for in our theoretical model. They do not explain the twin heterogeneity in the union turnout gap.

Furthermore, we tested alternative theoretical explanations in a number of robustness tests. In order to save space, a detailed theoretical discussion as well as results are presented in Appendix D. Here we briefly discuss the alternatives considered. First, we allow for direct mobilization by parties, to adjust for the possibility that union members might be contacted by parties at a higher rate. Second, we explicitly include the existence of “right-to-work” legislation in our statistical model to capture time-varying heterogeneity in the environment where unions operate. Third, we also allow for systematic state differences in levels of unionization and partisan polarization. Forth, we include the effects of informal-groups through political discussion, following the logic of Abrams et al. (2011). Finally, we adjust for occupational heterogeneity by estimating a model including occupational fixed effects. In all specifications we find our main result confirmed. This is not to say that these additional factors do not matter. For instance, in line with previous studies we find that political discussion is a significant predictor of turnout. What matters is that they do not change the effects of our main theoretical variables.22

V. CONCLUSION

In this paper, we have shown empirically – motivated by a new rational theory of mobilization – that the link between union membership and turnout depends on individual ideology and the electoral environment. Our analysis of surveys covering 22 national elections across the American states indicates that union membership substantively increases turnout among left-leaning members in competitive elections. Unions thus may tilt the electoral balance in favor of their morepreferred party. Our findings demonstrate that examining the electoral impact of unions requires taking into account electoral context and within-group ideological heterogeneity, and we believe that this applies more generally to voluntary associations. In political terms, average differences in turnout between members and non-members are much less relevant than turnout differences between polarized citizens.

22In this section, we focused on theoretically relevant confounder that are arguable pre-treatment. But we also estimated more specifications that allow for self-selection based on observable traits like political interest that are likely to be post-treatment. See Appendix F for details. They, too, confirm our basic results.
in close races. Choosing a research design that allows us to account for competitiveness and ideology, we find robust evidence consistent with our theory of rational mobilization. The context-sensitive impact of union membership on turnout is robust to alternative explanations such as party mobilization, political discussion in informal social networks, selection into unions based on political interest, and unobserved state-level features.

The main limitation of our data is that it does not contain direct measures of unions’ mobilization effort. Thus we cannot completely rule out that our findings, while clearly consistent with a theory of rational mobilization, are driven by some other logic of mobilization. Perhaps unions try to mobilize all members across elections but only left-leading members are responsive to their efforts and increasingly so as elections become more competitive. While possible, this does not strike us to be very likely because mobilization is costly. Union leaders with a political agenda have strong incentives to target unions’ scarce resources to where they have the largest effect, and qualitative accounts of union-targeting in campaigns are consistent with this view (Asher et al. 2001). More data would be nonetheless useful to further examine this question, and we are working on a follow-up project on this.

Going forward, our theoretical framework and empirical approach can be extended to analyze unions’ incentives for mobilization in alternative institutional settings, such as proportional representation electoral systems, and thereby contribute to comparative research on institutions and turnout.
REFERENCES


