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A.1 Stability and Instability in Latino Politics

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

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

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

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

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

A.2 Further Explanation for Intuition of Net Votes Analysis

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

$$\begin{aligned}\text{Net Votes}(x) = &(Pr(\text{Republican}|\text{turnout} = 1, x) - Pr(\text{Democratic}|\text{turnout} = 1, x)) \\ &\times p(\text{turnout} = 1, x) \times p(x)\end{aligned} \tag{2}$$

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

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

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

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

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

A.2.1 Shift in Net Votes

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

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

where

$$\begin{aligned}\text{Net Votes}_t(x) = &(Pr(\text{Republican}|\text{turnout} = 1, x)_t - Pr(\text{Democratic}|\text{turnout} = 1, x)_t) \\ &\times p(\text{turnout} = 1, x)_t \times p(x)_t\end{aligned} \tag{4}$$

and

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

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

A.2.2 Different Paths to Losses in Net Votes

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

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

A.2.2.1 Decreases in turnout

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

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

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

A.2.2.2 Decreases in Vote Choice

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

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

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

A.2.2.3 Decreases in Composition

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

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

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

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

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

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

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

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

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

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

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

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

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

Net Diff(x) of 0.016.

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

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

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

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

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

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

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

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

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

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

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

where ΔY_{tg} represents the monthly change in state-level Biden support in month t for group g (i.e., Latinos, non-Hispanic whites), β_1 reflects the marginal effect of reductions in mobility, β_2 represents the marginal effect of increases in Covid-19 deaths, β_3 adjusts for state-specific trends, and β_4 represents a step dummy that adjusts for a change in survey wording that occurred in September 2020. Coefficients are standardized to facilitate the interpretation of the estimates.

We estimate regressions separately for each group, and present the coefficients in Figure A1. Adjusting for unobserved differences between states and over-time changes in Covid-19 deaths, we find evidence that a standard deviation unit decrease in state-level mobility – a proxy for over-time fluctuations in Covid-19 mitigation policies – is associated with a .8 percentage point (pp) decrease in Biden support among Latinos. However, the marginal effect for non-Latinos is even larger (β_1 = 1.6pp), which runs counter to the expectation that Covid-19 had a *differentially* large effect among Latinos. While we detect a penalty among Latinos due to monthly increases in logged fatalities, the difference between groups is substantively small and statistically insignificant. In sum, while we find that decreased mobility due to Covid-19 may have contributed to lower Biden support among Latinos, these patterns were similar – if not more pronounced – among non-Latinos.

[1]We estimate a single-factor model to combine Google mobility data on time spent in retail locations, grocery stores, transit, workplaces, and residences (α = .75).

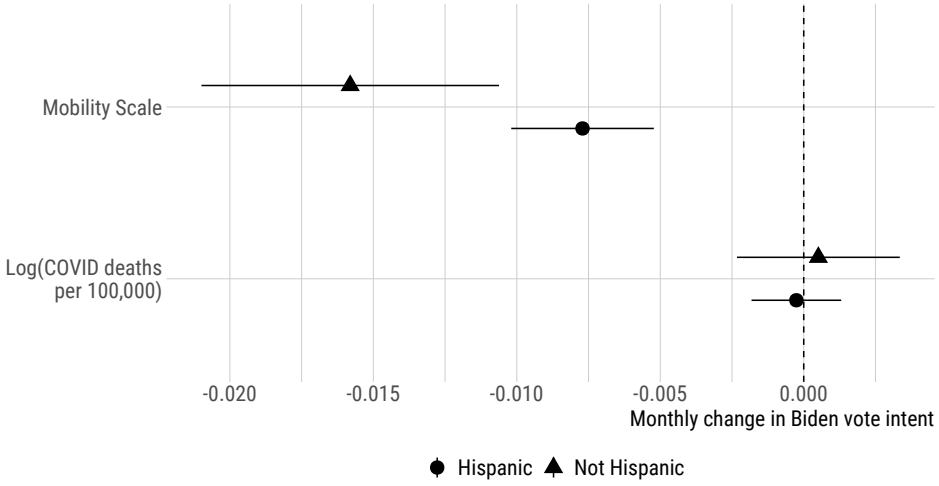

Figure A1: **Coefficient estimates for an OLS regression of monthly changes in Biden vote intent on pandemic-related variables** Point estimates with triangles and circles denote estimates for non-Hispanic whites and Hispanics/Latinos, respectively. Lines extending from point estimates indicate 95% confidence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

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

Table A1: Full Model Results

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

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

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

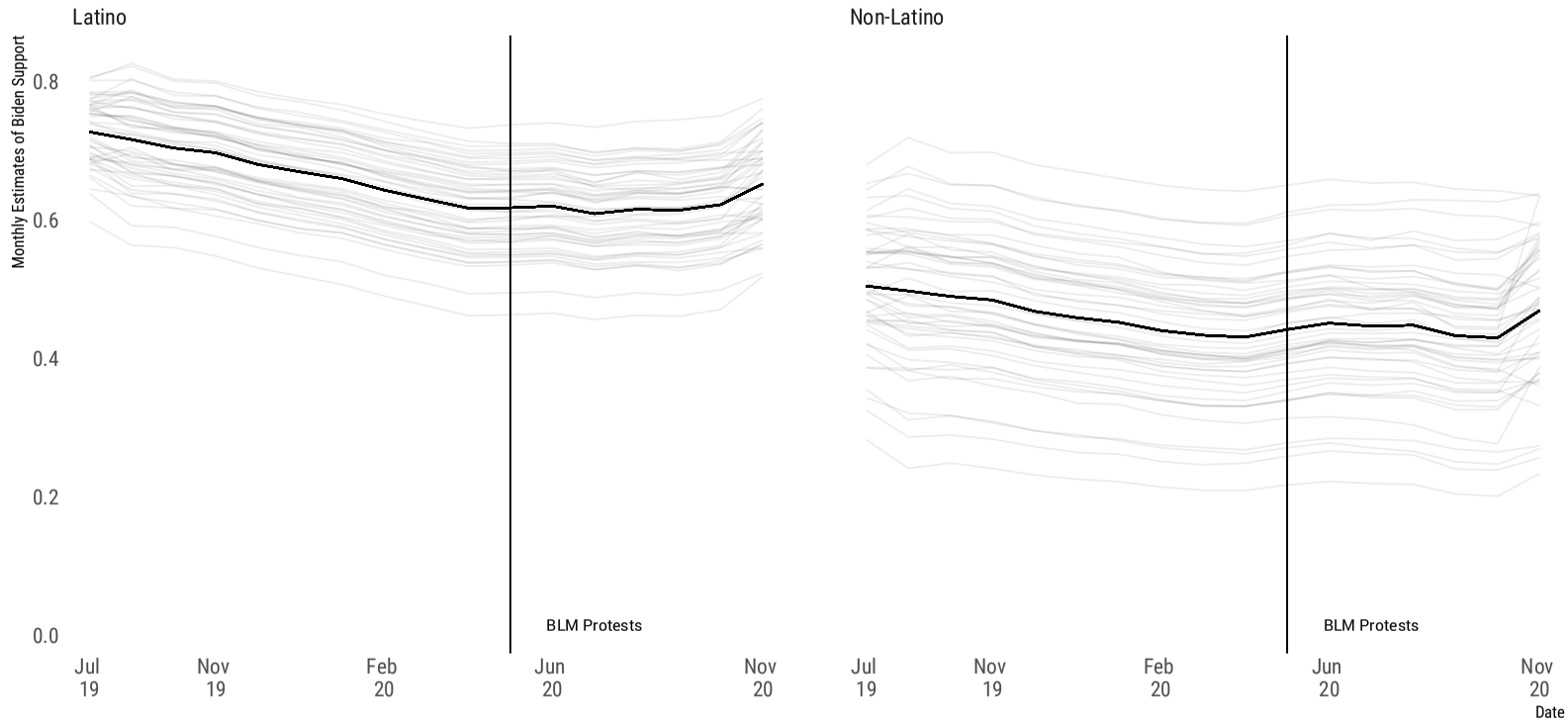

Figure A2: **Time series estimates of Biden support by group and state** Individual lines represent state-level dynamic MRP posterior median estimates of Biden support for each group. The dark line represents the mean estimate, averaging across states. Full set of dynamic MRP estimates can be accessed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

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

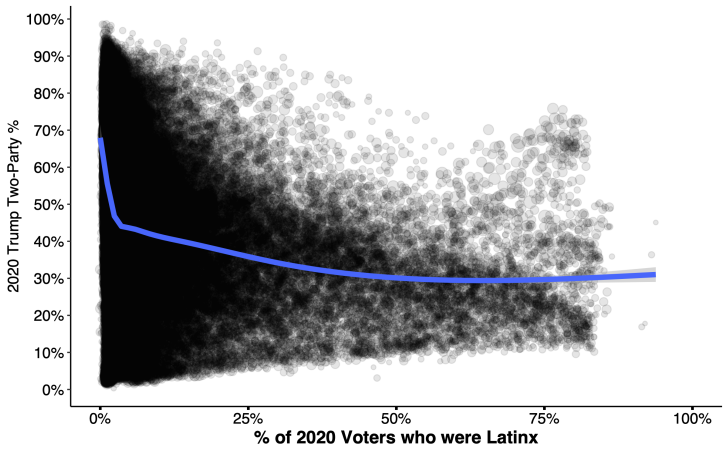

Figure A3: **Census Tract-level Trump 2020 Voteshare as a function of % Latino/a/x Voters**. Blue line represents a loess smoother.

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

[2]Note that the size scaling is topcoded at 10,000.

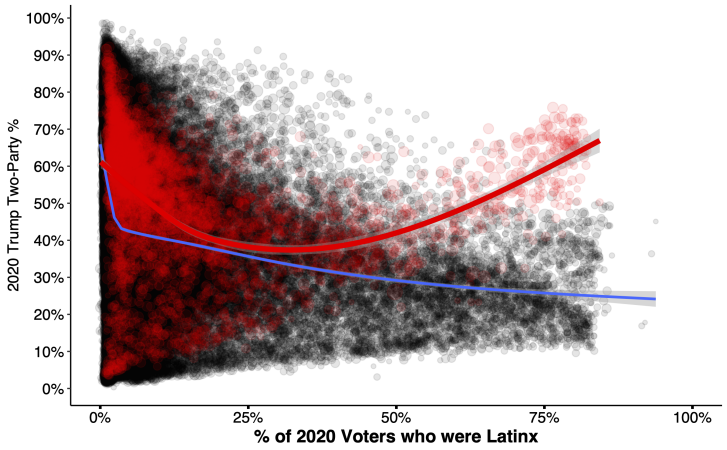

Figure A4: **Census Tract-level Trump 2020 Voteshare as a function of % Latino/a/x Voters**. Blue line represents a loess smoother run on tracts outside of Florida. Red points and line indicate Census Tracts in Florida.

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

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

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

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

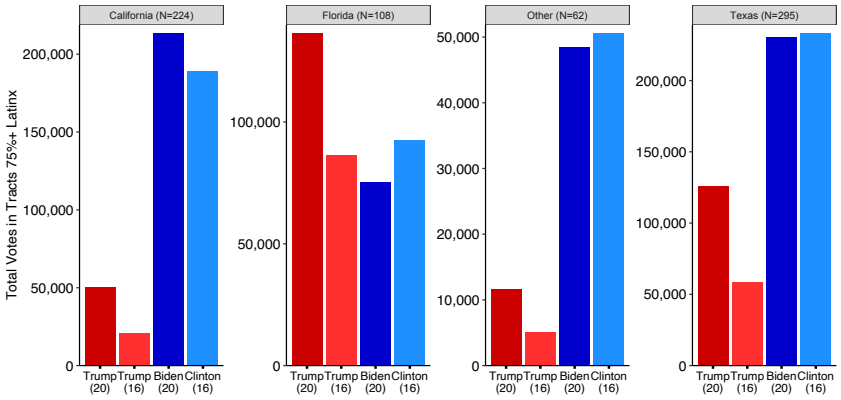

Figure A5: **Total Presidential Votes in 2016 and 2020 in heavily-Latino Census Tracts**. Includes 689 Census Tracts where 75% or more of 2016 voters were Latino. "Other" includes tracts in AZ, CO, IL, LA, MA, NJ, NM, NY, and PA.

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

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

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

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

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

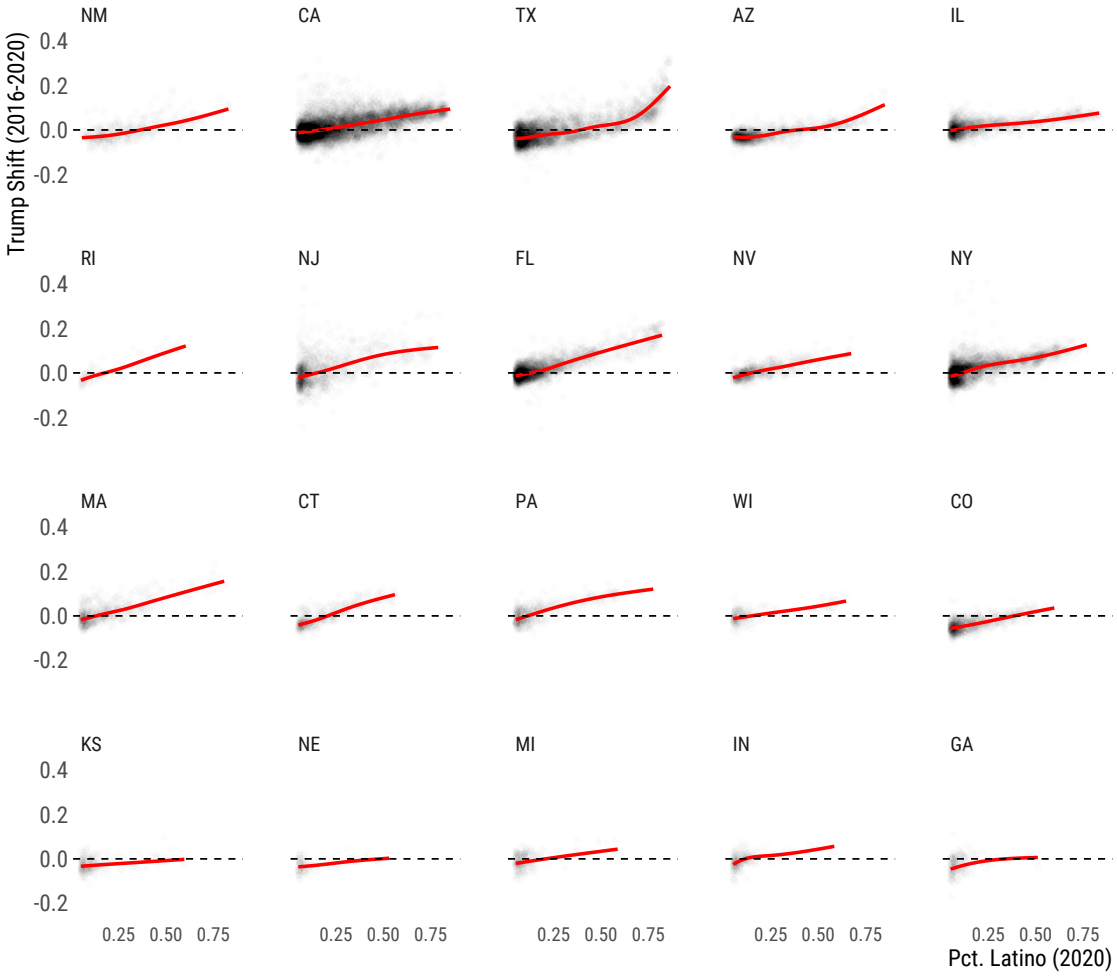

Figure A6: **Census Tract-level Trump 2020 Voteshare as a function of % Latino Voters, by State**. Includes all states with at least one majority-Latino Census Tract as of 2020. Points indicate Census tracts. Red line represents a spline smoother run on all Census tracts within the state.

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

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

A.8 2022 Analysis

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

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

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

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

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

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

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

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

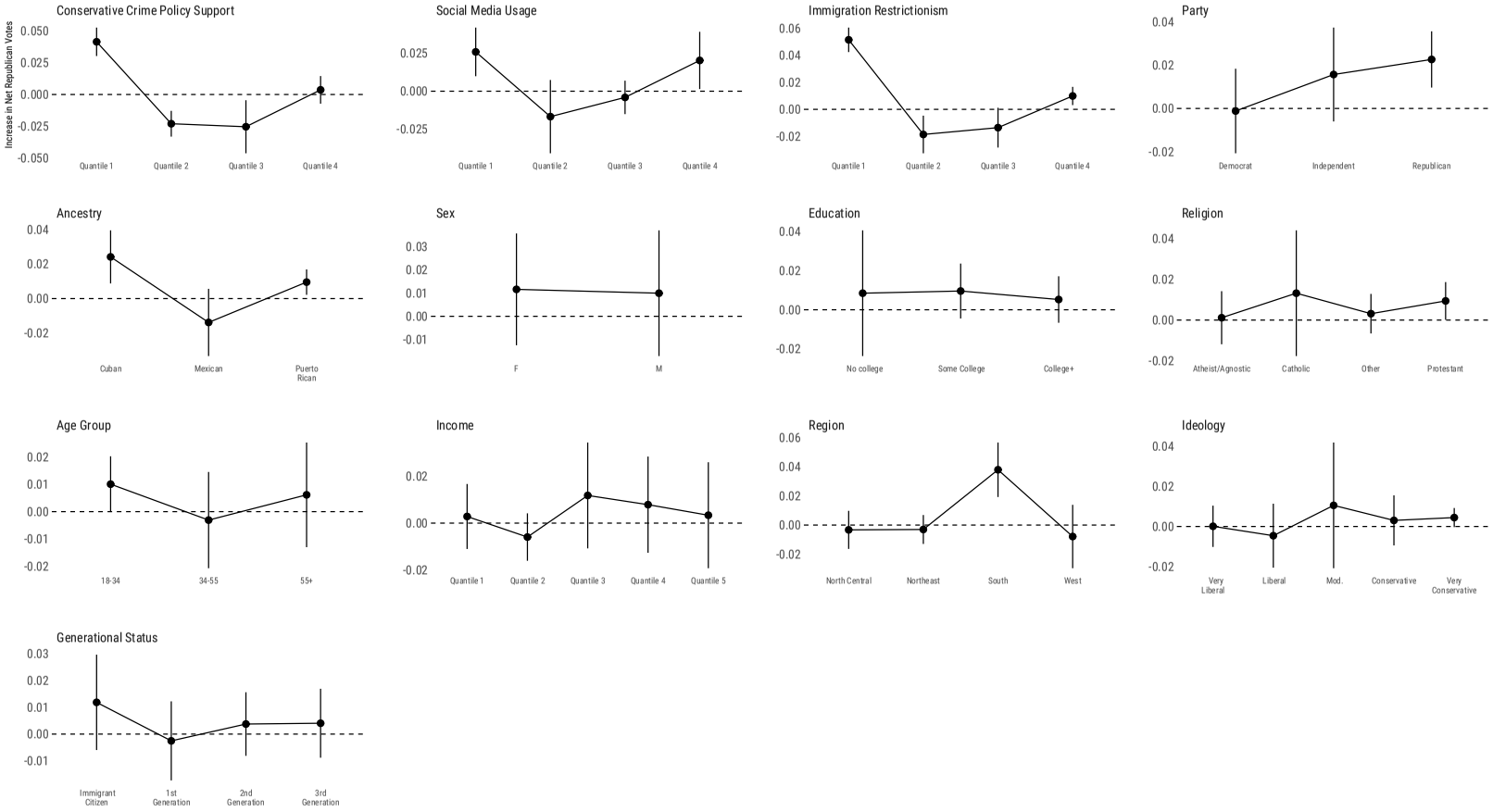

Figure A7: **Increase in net Republican votes from 2020 to 2022 among different Latino subgroups, fixing turnout to 2022 levels.** Positive scores indicate that House Republican candidates gained votes (relative to Trump) within a subgroup across elections. Negative scores indicate House Democratic candidates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

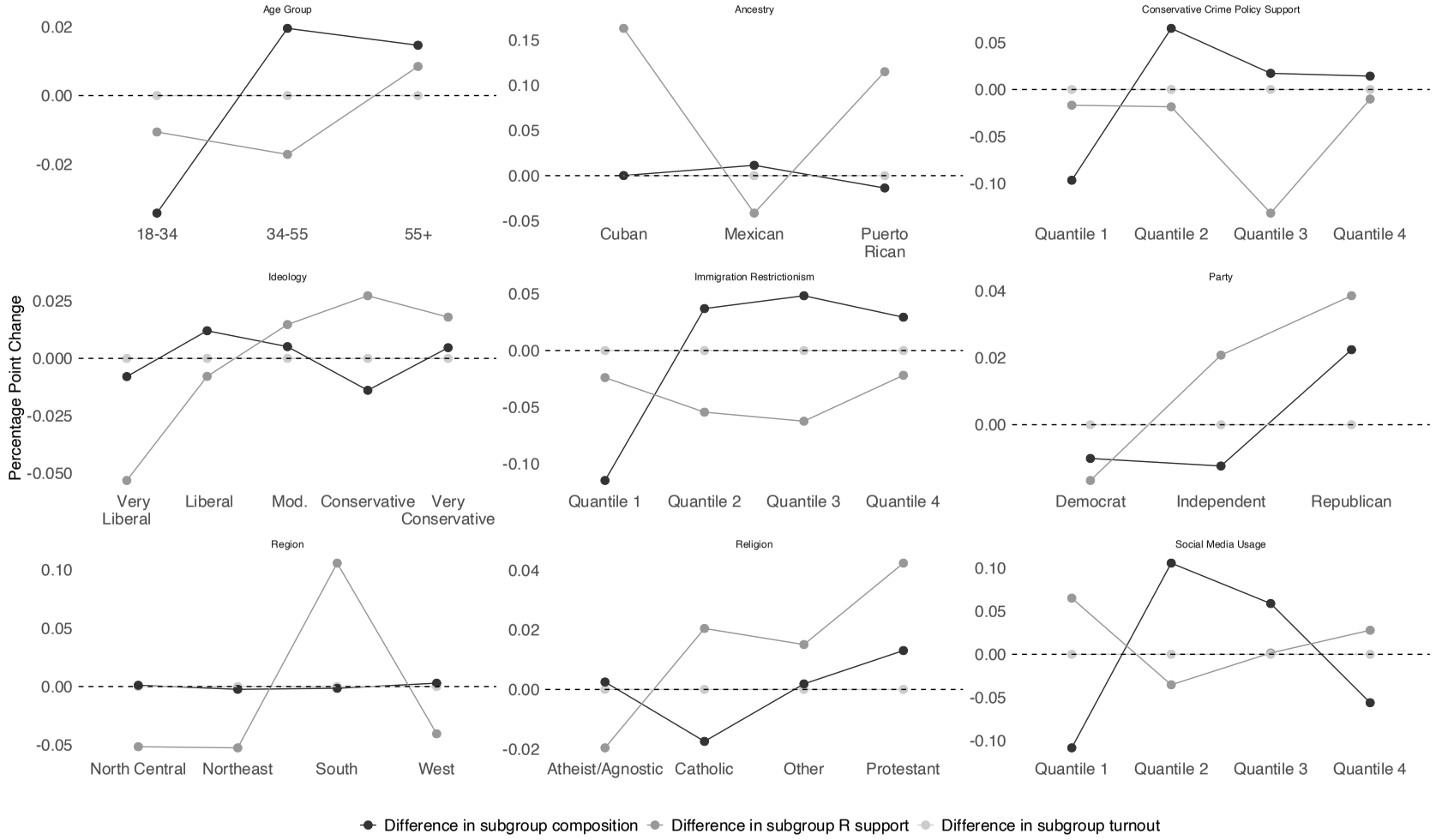

Figure A8: **Decomposition of net votes estimate (2020-2022)**, fixing subgroup turnout to 2020 levels. Full model estimates can be found in replication materials.

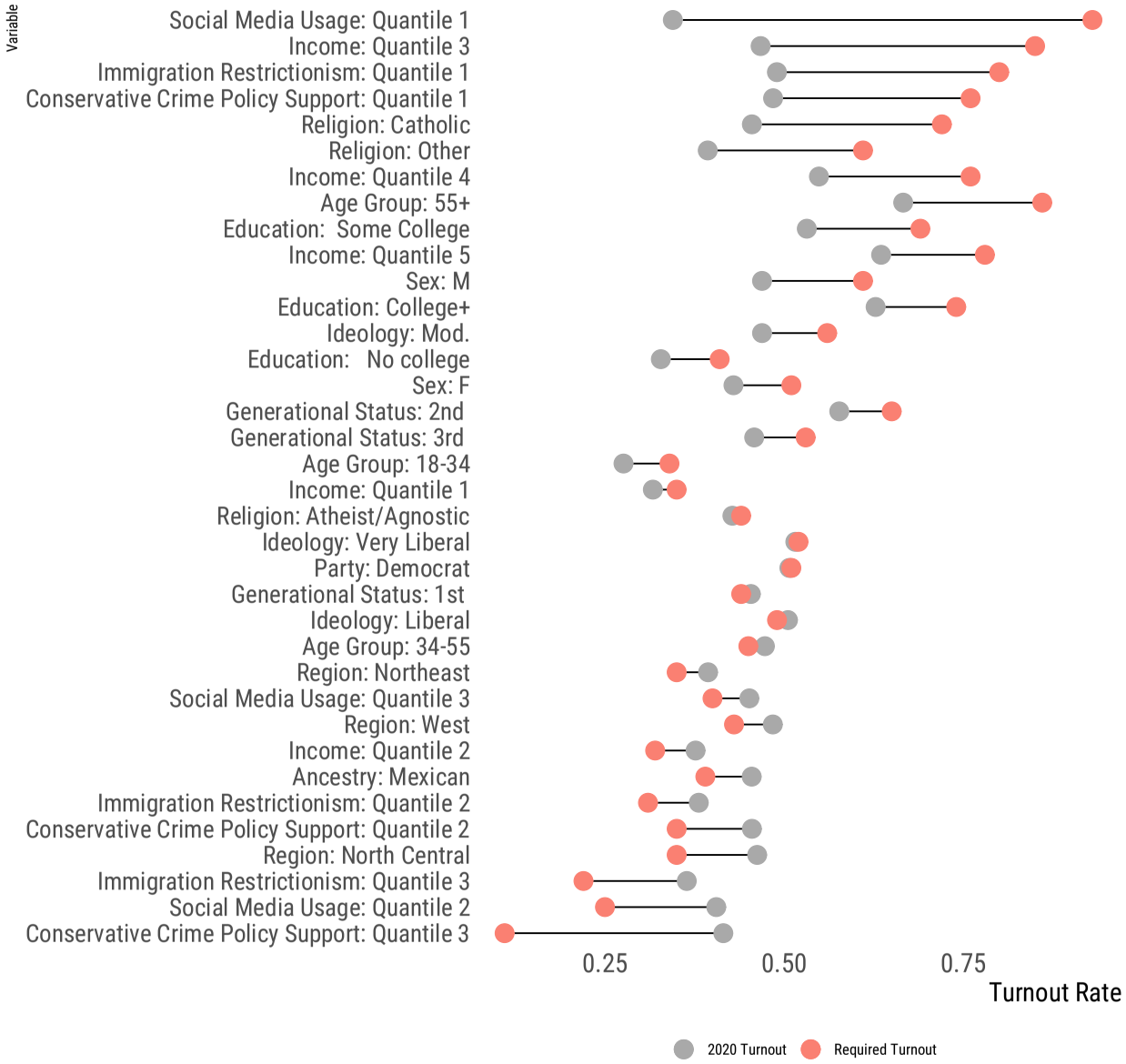

Figure A9: **Sensitivity analysis assessing required level of turnout to reverse Democratic net vote losses**

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