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# Growing Tea with Subnational Roots: Tea Party Affiliation, Factionalism, and GOP Politics in State Legislatures

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## Abstract:

Most research has examined the influence of the Tea Party as a social movement or loose organization, but less is known about its influence within legislative party politics, especially at the state level. In this paper, we argue that in this context the Tea Party is primarily an intraparty faction that has caused significant divisions inside the Republican Party. Using an original dataset of legislators across 13 states for the years 2010 to 2013, we examine legislator and district-level characteristics that predict state legislators' affiliation with the Tea Party. Our results reveal that in some respects legislators affiliated with the Tea Party are a far-right wing of the Republican Party. However, by other measures that capture anti-establishment political sentiment, Tea Party affiliated legislators comprise a factional group attempting to transform the Party in ways that go beyond ideology. These findings have important implications for the future prospects of the GOP.

In December 2013, the long simmering rift between the establishment wing of the Republican Party, led by Speaker of the House John Boehner, and the grassroots, fundamentalist wing, spearheaded by Tea Party-affiliated Republicans, became very public. Boehner openly criticized the strategy of Tea Party groups that forced their members in Congress into supporting a government shutdown to defund Obamacare (Roberts 2013). The acrimony between Boehner and the Tea Party continued throughout his tenure; the House Speaker tried “to prevent the Tea Party wing from crashing through the gates of the establishment and putting Washington on total legislative lockdown” (Allen 2015), while the Tea Party attempted on numerous occasions to replace him as Speaker.

Similar fights between Tea Party-affiliated legislators and establishment Republicans occurred at the state level. Take for example the Texas legislature. In 2017, the Tea Party-aligned House Freedom Caucus, comprised of twelve Republican members, became known for their “highly vocal and confrontational tactics to challenge House Speaker Joe Strauss and other mainstream Republicans” (Montgomery 2017). In one prominent case, the House Freedom Caucus was able to hold up a “sanctuary cities” bill until they successfully amended it with provisions allowing local law enforcement officers to question people about their immigration status during traffic stops (Montgomery 2017). Members of the caucus viewed the revisions made to the “sanctuary cities” bill as an example of how the caucus has influenced legislative decisions within the Republican-led Texas House (Montgomery 2017).

Despite its status as the most significant conservative political movement in the 21<sup>st</sup> century (Gervais and Morris 2018), little is known about the underlying characteristics of officeholders who affiliate with the Tea Party.<sup>1</sup> This reflects a lingering disagreement in both the scholarly literature and in the broader culture about the true origins of the Tea Party, and what its influence indicates about the modern Republican Party. Is the Tea Party little more than an ideological movement, intent only on shifting the Republican Party farther to the right? Or is it a truly factional movement with more dynamic characteristics and goals? We propose and find evidence that the latter is a much truer squarely with one of the two major parties, but do not adhere to their traditions, organizational structures, and conventional practices. The Tea Party is indeed an ideologically extreme movement, but its emergence has been equally fueled by anti-establishment, anti-government sentiment that transcends ideology and has more in common than one might think with far-left movements like the Democratic Socialists of America (DSA).

In the 2010 midterm elections the Republican Party gained control of both houses of Congress, including their largest majority in the House of Representatives since 1931, thanks in no small part to the burgeoning Tea Party movement. However, they also saw significant gains in state legislative seats during this same period. During the height of the

movement (and still to this day), the Tea Party has had a large presence in state legislatures. While high-profile Tea Partiers have had significant influence in the U.S. Congress, their numbers have been relatively few, making it difficult to systematically analyze the factors that predict membership. State legislatures, on the other hand, feature substantial variation between Republican legislators and their districts, offering a unique opportunity to study meaningful intraparty differences. This paper leverages this variation to better explain the factors that lead legislators to affiliation with the Tea Party, and to assess their status as a disruptive intraparty faction within the Republican Party.

Our results indicate that both conservative ideological attitudes *and* anti-establishment factors are the most prevalent and consistent predictors of Tea Party affiliation. Building on previous work that has explored the grassroots origin of the Tea Party (Zernike 2010; Skocpol and Williamson 2012), the influence of the movement in Congress (Ragusa and Gaspar 2016; Gervais and Morris 2012, 2018), and the effects of intraparty factions (Baer 2000, DiSalvo 2009), we identify the key factors that predict state legislators' association with the Tea Party. We demonstrate that in many ways, the Tea Party is a model of a straightforward far-right wing of the Republican Party – more conservative, whiter, and with backgrounds fitting the extreme Republican archetype. But Tea Party legislators are also far less likely than typical Republicans to have prior political experience, serve in their chamber for long periods, or hold leadership positions in the Party. The prevalence of these traits shows that in addition to being ideologically extreme, the Tea Party is also an anti-establishment movement intent on disrupting the partisan status quo. In drawing this key distinction, we provide greater insight into how interparty divisions shape legislative organization, particularly within the modern Republican Party in the states.

### **Origins and Concepts of the Tea Party Movement**

By most accounts, the Tea Party movement came into existence after the passage of the 2009 stimulus bill (Gervais and Morris 2015). Groups across the country organized protests highlighting frustration over what many viewed as an overreaching government wastefully spending tax revenue. These groups believed the government needed to be reined in and returned to the Founding Fathers' fundamental constitutional principles. Those who argue that the movement came about mainly because of racial resentment counter the anti-government narrative, as the basis for the inception and motivation of the Tea Party. This resentment was manifested through opposition to the presidency of Barack Obama, as well as the generational and demographic shift his election represented (Parker and Barreto 2014; Williamson, Skocpol and Coggin 2014).

While the Tea Party as an identifiable entity has rescinded, its influence continues to fuel conservative politicians and perpetuates divisions with the GOP establishment. Differences between Tea Party members and other conservatives present some of the most interesting research on the movement (Maxwell and Parent 2012). However, little work on these distinctions extends into the legislative arena, especially at the state level. Given the divisions, there clearly appear to be differences between “establishment” Republicans and those who ran as Tea Party candidates (Gervais and Morris 2012). However, important questions remain about how exactly to identify and measure these differences.

### **Republican Factionalism and Polarization: (Tea) Party Fundamentalists and the GOP Establishment**

Since the rise of the Tea Party in 2009 and between 2010 and 2015, Republicans won a net gain of 913 state legislative seats (Cillizza 2015). Given that there are roughly 7,000 state legislative seats across the country, the 913-seat gain by Republicans means that approximately 12% of state legislature seats went to the Republican Party in the span of a decade. Part of Republican success during this time was due to the rise of the Tea Party movement (Wilson 2014). However, these victories likely came at the cost of intraparty stability. The Republican political establishment garnered significant mistrust of the movement's motivations (Skocpol and Williamson 2012), while Tea Party-affiliated groups worked to undermine the Party's more moderate and mainstream agenda and defeat incumbents who were not true party loyalists.

Differences within the party pertaining to characteristics like political experience (a euphemism for “establishment”) and sentiments on issues of diversity have factionalized Republican-controlled legislatures. At the height of the Tea Party movement, some argued that mainstream Republicans were accountable to the Tea Party and not the other way around (Hood, Kidd and Morris 2015), indicating a real struggle to define (or redefine) Republican ideals. Competing

theories aim to explain the true origins and motivations of the movement, but most agree that Tea Party and affiliated legislative caucuses have caused a critical fissure within the Republican Party that threatens its long-term viability (Coll 2013).

Many of the defining features of the Tea Party are emblematic of today's heavily factionalized party environment. Chief among these features is the populist, anti-establishment, and anti-intellectual bent of many Republicans, which not only characterized the rise of the Tea Party in 2009, but also propelled the presidential nomination and election of Donald Trump in 2016. Another important feature of the Republican cleavage is the hyperpolarization that has disproportionately inflicted the Party. The Republican Party has moved much further to the right than the Democratic Party has moved to the left (Grossman and Hopkins 2015). Tea Party ideals help drive this rightward shift and "reflect a longer, deeper decline in the Republican Party's ability to tolerate a diversity of ideas..." (Coll 2013). How this struggle within the party is resolved is still an open question.

Factionalism has a long history in American Politics. At the country's founding, both Alexander Hamilton (in Federalist No. 9) and James Madison (in Federalist No. 10) warned about the destructive nature of factions and their potential for breaking the new republic apart. Of course, the most prominent factions were those that eventually developed into political parties. The two-party system that dominates American politics leaves little room for many cross-party factions to emerge (Reiter 2004). Therefore, most factions are of the intraparty variety, but scholars have paid little attention to them. This is regrettable because factionalism within parties is crucial to understanding political parties (Beller and Belloni 1978; Reiter 2004). While a consensus definition for a faction is hard to find, most scholars who study the phenomenon agree that they are more than loose alliances within an organization and that they must be able to compete with rivals for "power advantages" (Beller and Belloni 1978). DiSalvo (2009: 31) defines an intraparty faction as "a party subunit that has enough ideological consistency, organizational capacity, and temporal durability to influence policy making, the party's image, and the congressional balance of power." This description seems to fit the Tea Party Caucus in Congress, but we suspect it also describes Tea Party-affiliated caucuses in state legislatures (to varying degrees) as well.

Historical intraparty factions in Congress have taken a number of forms and have exercised power in various ways (Reiter 2004; DiSalvo 2009). Some intraparty factions are more formal than others, and some seek to concentrate power, while others seek power decentralization to achieve their goals (DiSalvo 2009). Reiter (2004) posits three types of intra-party cleavage: kaleidoscopic (based on patronage, with low probability of affecting party unity), consensus (based on individual personalities, with low probability of disturbing party unity), and persistent (based on ideological differences that create constant clashes; brings high potential for disrupting party unity). Reiter notes that parties likely experience all three types of intra-party factions at some point in their existence. However, the viability and endurance of these factions often depends on exogenous forces like the broader political system.

The Tea Party exhibits the characteristics of a *persistent* faction, with a fairly organized structure.<sup>2</sup> It has sought to decentralize and redistribute power within the broader Republican Party in order to disrupt normal party activities and shift its ideological position to the right. By all accounts, then the Tea Party and affiliated legislative caucuses have the hallmarks of a strong intra-party faction. As such, it is important to examine factors that make it more likely for legislators to align together over the more mainstream wing of the Republican Party. Doing so will help us better understand how their presence has affected state policies that more directly influence the lives of people, compared to those enacted at the national level.

An accelerant to the rise and success of the Tea Party has been the hyperpolarized political environment in which the movement was able to take hold. Over the past decade, the Republican and Democratic parties have become more distinct, and each more cohesive (Lee 2015). These factors, coupled with greater party competition, have led to increased conflict, both across and within parties. This conflict has been more pronounced within the Republican Party, which has always stressed doctrinal purity and has punished those who are not viewed as sufficiently devoted to conservative principles (Mann and Ornstein 2012; Grossmann and Hopkins 2015). Tea Party members have led the accusations of ideological betrayal. The conservative purity test creates tensions that threaten to break the Republican Party apart, especially when a decreasing number of moderate Republican candidates are less willing to run for office to counter extreme right wing forces (Thomsen 2014).

## Portrait of a Tea Partier

One of the major challenges in identifying legislators who are in some way associated with the Tea Party is trying to understand the movement itself. Research attempting to identify the movement's core goals has produced interesting, but mixed results. An extension of this work considers these varying perspectives, and identifies the mechanisms and motivations at work behind the actions of Tea Party elites. We argue that identifying these elements among state legislators is an important avenue towards better understanding this influential movement.

In terms of actionable change, Tea Party supporters, especially activists, prioritized replacing their own representatives—mainly Republicans—with those who would better adhere to the movement's principles. In particular, they looked to defeat incumbents who supported the Obama legislative bail-out package (Bullock and Hood 2012). Further separating Tea Party activists and the Republican establishment is an underlying cultural resentment that government and societal institutions are not working (Zernike 2010). While most of the research on the Tea Party revolves around the characteristics of activists, relatively little work has examined elected officials, particularly at the state level. Furthermore, since the Tea Party is purported to be a grassroots movement born out of citizen frustration, identifying elite Tea Party support is a natural area in which to expand this research.

At the state level, Tea Party groups continue to back candidates and influence elections (Coaston 2018). As some have noted, the Tea Party movement paved the way for the rise of grievance politics and the election of Donald Trump as president (Williamson 2016; Gervais and Morris 2018). For these reasons, it is important to identify characteristics that are prevalent for elected representatives who aligned themselves with the Tea Party. It is reasonable to expect that these factors are not only an extension of the traits that define Tea Party supporters, but they will also continue to define the internal struggles of the Republican Party and will play a role in future elections.

Can state legislators who are affiliated with the Tea Party movement be distinguished from other Republican representatives? We examine this question by adapting prior observations about the Tea Party into a framework that leverages the factional nature of the group and its elite members. Then, in pairing this framework with a unique dataset of Republican state legislators, we assess the validity of two theories about the causes of Tea Party affiliation among state legislators using two distinct sets of identifiers. The first set posits the likelihood of Tea Party affiliation as the result of possessing demographic, socioeconomic, and ideological traits more commonly associated with Republicans than Democrats. In this way, Tea Party legislators are understood to simply be “more Republican”. Conversely, the second set of identifiers captures background traits related specifically to political careers and amateurism. These identifiers capture the anti-establishment attitudes and experience that characterize the Tea Party's direct challenges to Republican Party hierarchy, and firmly establish them as a factional group.

Our first set of identifiers captures individual-level descriptive traits and characteristics that fit the Republican Party mold. Republican voters are more likely than ever to be white, male, less educated, and conservative on both economic and social issues than the average voter (Pew Research Center 2018). Several scholars have asserted that the Tea Party is no more than a brand or offshoot of Republican politics (Ashbee 2011; Arceneaux and Nicholson 2012), or a “cluster” of interest groups driven by Republican officials and elites (DiMaggio 2011). By this logic, legislators who affiliate with the Tea Party should have many similar characteristics as their fellow Republicans. Descriptively, what we mostly know about Tea Party members and loose affiliates comes from observations about the characteristics of activists within the movement. Tea Party activists tend to be older, white, males who are more educated, and financially better off than the rest of the population (Zernike and Thee-Brenan 2010). Another commonly observed trait among Tea Party activists and supporters is that they tend to be conservative not just on economic issues (Skocpol and Williamson 2012), but on social issues as well (Clement and Green 2011). This social conservatism has drawn disproportionate support from religious adherents, particularly among white evangelical Protestants (Hood III, Kidd, and Morris 2015) who perceive a shared set of ideas (e.g. antigovernment sentiment and American exceptionalism) with the Tea Party Movement (Wilson and Burack 2012).

In terms of these characteristics, the Tea Party is therefore not a completely unique entity, but instead a more consistently right-polarized faction of the Republican Party. These characteristics congeal into what we term the “extreme Republican archetype.” Republicans are likelier to fit this archetype than the average voter, and legislators affiliated with the Tea Party are more likely to do so than the average Republican legislator. As a result, we propose the following *Extreme Republican Archetype Hypothesis*:

**H1: Republican state legislators who more closely fit the extreme Republican archetype will have stronger affiliation with the Tea Party.**

However, we also posit that the Tea Party represents something more dynamic than an extreme version of Republicanism. While we know from previous literature that the movement is largely made up of those who consider themselves Republicans (Karpowitz, et al. 2011), there are important distinctions in members of Congress who signal affiliation with the Tea Party via membership in the Tea Party caucus (Gervais and Morris 2012, 2018). In their descriptive and ideological traits, Tea Party legislators may well fit an extreme, but ultimately Republican, archetype; but in their pathways to political power, and most importantly in their broadly anti-establishment worldview, Tea Party legislators directly *conflict with* rather than *converge with* the Republican establishment.

Scholars note that Tea Party members have a deep distrust of the Republican Party, and although the movement has not taken the form of a third party, its members are intent on “dumping” the Republican establishment while working through the existing two-party system (Skocpol and Williamson 2012). We know from the extant literature that one of the Tea Party’s priorities was to elect “outside” candidates who could replace entrenched Republican politicians as a way to shake up the system and interrupt the status quo. Tea Party activists and leaders tend to show disdain or distrust for the Republican Party and the broader political establishment. This, in many ways, is the most salient means by which the Tea Party has made its mark and affected policy outcomes; the movement has bucked the party establishment and developed into an intraparty faction.

Therefore, we expect that legislators will have greater affiliation with the Tea Party if they have less prior political or party organizational experience. We argue that affiliation with the Tea Party is the natural result of distinctly nontraditional pathways to office or disdain for traditional party power structures that give the Tea Party its factional qualities. As a result, we posit the following *Anti-Establishment Hypothesis*:

**H2: Republican state legislators with non-traditional, anti-establishment political careers will have stronger affiliation with the Tea Party.**

**Data and Methods**

In order to explore the factors that predict Tea Party affiliation in state legislatures, we examine legislator and district characteristics in 13 states, based on data gathered by the Institute for Research and Education on Human Rights’ (IREHR) Tea Party Membership Database. IREHR ranks state Tea Party membership based on a number of factors, including the number of identifiable Tea Party members and the number of local Tea Party groups (Burghart 2014). While IREHR has rankings for all states, we include primarily states with most of the highest per-capita Tea Party activity. To measure this, we utilized the IREHR rankings and 2013 Census population estimates of each state to arrive at a measure of the highest-ranking states in terms of per-capita Tea Party activity. The states selected that fall under this categorization are: Arizona, California, Florida, Indiana, Michigan, North Carolina, Ohio, Texas, and Washington. In addition, we also included four other states (Kansas, Maryland, Alabama, and South Carolina) that provide more substantial variance in a number of categories. First, by including several states from the former Confederacy, we examine greater geographic dispersion. These states also help to balance our sample of states based on median household income, education, minority population, and religiosity.<sup>3</sup> Since accumulating legislator-level data for all 50 states was not practically possible, we believe this sample of 13 provides a robust cross-section of legislators and districts (N=2,506) that are broadly representative of the nation as a whole. For this sample of states, we examine legislators serving between 2010 and 2013. This period encompasses the range of elections when the Tea Party was most rapidly emerging.

Specifying the extent to which a state legislator is associated with the Tea Party movement is not an easy task. First, as previously discussed, the Tea Party is not a unified and tangible organization, but rather a disaggregated and autonomous confederacy of various groups who share similar ideas and principles, but who do not necessarily organize together to accomplish their goals. Second, does association have to be mutual or can a Tea Party group show support or interest for a legislator without reciprocation and vice versa? To tackle the challenge of identifying and quantifying the relationship between state legislators and the Tea Party, we created an additive index of Tea Party association. We identified the most prominent types of associations that capture proactive steps on the part of legislators, Tea Party organizations, or both to establish a link between one another. Included in our additive Tea Party index are indicators of whether or not the following five associational conditions were met:

- Is mentioned in the media as a Tea Party candidate or legislator
- Attended a Tea Party meeting or rally<sup>4</sup>
- Received an official endorsement from a Tea Party organization
- Received a campaign contribution from a Tea Party organization
- Joined a legislative Tea Party Caucus in the state legislature

This variety of sources of association offer valuable levels of validity for our measurements. These conditions capture Tea Party association at different stages of both the electoral and legislative processes. Furthermore, as Figure 1 indicates, they also vary in terms of the proportion of Republican state legislators who are classified with each activity.

[Figure 1 about here]

While all of these conditions are indicative of association with Tea Party organizations, there are differences between them that provide important variation and allow us to capture different types of affiliation. Some conditions, such as attending a Tea Party rally or joining a caucus, indicate a legislator actively seeking out association with the Tea Party, regardless of whether an official organization recognizes them as such. Other conditions, like receiving an endorsement or a campaign contribution from a Tea Party organization, may indicate either asymmetrical or symmetrical affiliation, where Tea Party organizations want to associate themselves with a legislator, with or without reciprocity. Media mentions, on the other hand, are a third-party indicator. These differences in types of affiliation are substantively important and are reflected in the literature. Most recently, Gervais and Morris (2018) characterize members of Congress' association with the Tea Party as operating on two dimensions, either as "attachment" of a legislator to the Tea Party, or as "support" of a legislator on the part of Tea Party-affiliated voters.<sup>5</sup>

Since the five component measures reflect substantively different mechanisms of Tea Party association, we argue that they offer a more complete picture of how an association with this movement plays out. We can expect that when legislators exhibit a greater total number of these indicators, they are more likely to be associated with the Tea Party. As a result, we add together the total presence of each of these conditions for a legislator to create the *Tea Party Index*, the dependent variable in our analysis.<sup>6</sup> The rationale here is that the more of these conditions a legislator meets, the higher their overall association with the Tea Party. Since very few legislators satisfied more than three of the above conditions, the Tea Party Index was collapsed into three categories: no Tea Party association (0 conditions met); some Tea Party association (1 condition met); and significant Tea Party association (2 or more conditions met). In our sample, about 38% of all Republican state legislators registered at least some Tea Party association. Of these, about a quarter registered as significant Tea Party associates (about 7.5% of the entire sample).

The presence or absence of each condition of association with the Tea Party was coded using web searches based on news articles, campaign websites, state legislative websites, websites of local Tea Party organizations, etc. Searches were conducted using the legislator's first and last names, the name of the state and/or district in which they served, and phrases that picked up hits for articles on the Tea Party movement. We also included searches with specific, well known Tea Party groups such as FreedomWorks and the Tea Party Express. These search criteria are similar to those utilized in other studies (c.f. Karpowitz et al., 2011).<sup>7</sup> Coders looked for any indication of the legislator being endorsed by a Tea Party group or attending a meeting hosted by a Tea Party organization. We relied on data from the National Institute of Money in Politics to identify legislators who took money from Tea Party groups. Web searches were also performed to determine the presence of a legislative Tea Party caucus in each state, then linked with those legislators in our dataset.

To test our hypotheses regarding Tea Party affiliation, we include both legislator and district-level characteristics from which we have theorized potential effects. First, we include variables capturing our *Extreme Republican Archetype Hypothesis* (H1). The first of these is race. The modern GOP is increasingly a party of white voters and white representatives, and the archetypical Republican legislator would reflect this trend. We include an indicator for whether a Republican state legislator is nonwhite – and therefore expect this to have a negative effect on Tea Party affiliation. Another important indicator is ideological conservatism. The Republican Party has become increasingly conservative at the elite level, and the Tea Party represents a particularly conservative faction of the party. Using Shor and McCarty's (2018) legislator-level ideal point measures, we predict that ideological conservatism in the chamber will lead to higher affiliation with the Tea Party.

We also include a measure for gender. While research notes that the majority of supporters of the Tea Party tend to be male, some work has noted that Tea Party groups endorsed Republican women for office (Schreiber 2012) and that women hold disproportionate local leadership positions within the movement (Deckman 2016). However, our *Republican Archetype Hypothesis* predicts that Tea Party legislators are more likely to be male.

To measure whether and how educational attainment affects Tea Party association, we include a variable for education (measured as high school or less, Associates degree, Bachelor's degree, or Postgraduate degree). Voters with greater educational attainment are among the fastest-moving demographics toward the Democratic Party, and this split is reflected in elite representation. Therefore, the *Republican Archetype Hypothesis* holds that legislators with less educational attainment should have higher Tea Party affiliation. A related area concerns salient occupational backgrounds. Two non-political pathways to office that are archetypical to the modern GOP include a background in business and military service. We expect both to positively predict Tea Party affiliation. Business experience, in particular is a strong expectation given the notable emphasis Tea Party activists and elites have placed on "running government like a business." We include a number of other occupational characteristics – legal, policy, and farming/manufacturing backgrounds – for which we do not have particular expectations, but which were available and may indicate certain social/cultural enclaves of which Tea Party affiliation may be more or less a feature.<sup>8</sup>

Affiliation with an established conservative religion is also a characteristic confined more to the Republican Party. A majority of white evangelical Protestants support Republican candidates (Sciupac and Smith 2018), and there has been an observed strong association between evangelicalism and Tea Party support (Hood, Kidd, and Morris 2015). We therefore expect the promotion of Christian religious adherence to be positively associated with Tea Party affiliation in fitting with a Republican Archetype. Therefore, we include a binary indicator of whether a legislator publicly identifies with a religion, signaling to voters their religious adherence.

Finally, we include variables capturing relevant district-level demographics, on the possibility that Tea Party affiliation is driven not just by legislator characteristics, but also by district characteristics influencing the behavior of the legislator. Specifically, as a legislative district adheres more extremely to archetypical characteristics of the modern Republican voter, Tea Party affiliation becomes more likely for a Republican legislator. As such, we include district measures for the following: median income; % with a bachelor's degree; whether a district is located in the South<sup>9</sup>; and % of the district identifying as white. These measures, as well as a control measure for district unemployment, were taken from the American Community Survey estimates of the U.S. Census Bureau.

Our second broad hypothesis, the *Anti-establishment Hypothesis* (H2), states that legislators with non-traditional, anti-establishment political careers should have higher affiliation with the Tea Party. These types of careers are marked by the presence (or absence) of a number of diverse factors, but which all capture the "anti-establishment" concept. First, we argue that newcomers to the political process should be more likely to affiliate with the Tea Party given the movement's anti-establishment tendencies and fundamental distrust of the institutional hierarchy of the Republican Party. We therefore include indicators of whether the legislator has prior elected experience at any level of government. Similarly, we include an indicator for whether the legislator has background experience within the Republican Party, such as being a delegate to the national convention, working as a staffer for Republican elected officials, or working for the state or local Republican Party organization. We expect that legislators with these political backgrounds will be less likely to affiliate with the Tea Party.

Second, we include a continuous measure of how many years a state legislator has served in office, on the expectation that longer-serving members are more likely to be part of the Republican Party establishment. We also include a binary measure of whether the legislator was elected post-2010, indicating whether the national rise of the Tea Party itself could have been a motivator for them to run. Finally, we include an indicator for whether a legislator is a chamber party leader. We expect that party institutionalists will be highly unlikely to affiliate with the Tea Party.

We also control for chamber-level factors that may have exogenous influences on legislator-level Tea Party affiliation. We include a measure for ideological chamber polarization on the expectation that more extreme polarized legislatures may be more hospitable to Tea Party legislators.<sup>10</sup> Additionally, we control for level of professionalization of the legislature, since the anti-establishmentarian nature of the Tea Party may make affiliated legislators more likely to emerge in citizen legislatures, rather than in more professional settings.<sup>11</sup> Finally, we include a continuous "time" variable to capture the four years of our sample, to account for whether Tea Party affiliation was at its peak in 2010, and declined thereafter.

We estimate our models using generalized least-squared regression to test the effects of the independent variables on the extent of a state legislator's affiliation with the Tea Party. Since legislator-observations occur multiple times in our data, we use random effects<sup>12</sup> for individual members to avoid the assumption that these are independent observations, and in order to capture legislator-level variation not accounted for in the independent variables.<sup>13</sup> See Table A1.1 in the Appendix for descriptive statistics of each variable included in the models. The results of the analyses are discussed below.

## Results

Are Tea Party legislators simply an extreme representation of the Republican Party, a truly factional group bucking the party, or both? Table 1 offers some revealing insights into these questions, displaying the results of our unified GLS model, split between legislator and district-level variables. While some of these variables – particularly the legislator-level background characteristics – appear to have little statistical association with legislators' Tea Party affiliation, many others have important implications for our hypothesized effects.

[Table 1 about here]

The directionality of most legislator- and district-level variables confirm that Tea Party legislators, even when compared only to other Republican state legislators, are in general more archetypical Republicans (H1). The first and most statistically strong of these characteristics is, unsurprisingly, legislator ideology. As Figure 2 indicates, ideal point scores for state legislators, for which higher values indicate greater ideological conservatism, predict higher Tea Party affiliation. The least conservative Republican state legislator is predicted to garner a Tea Party Affiliation Index score of around .35, while the most conservative predicts a score of .51. Therefore, as Republican state legislators become increasingly conservative, they are more likely to affiliate with Tea Party.

[Figure 2 about here]

Religious identification is another variable that shows Tea Party-affiliated Republicans more closely fitting the archetypical Republican model. Affiliation with a religion corresponds with a .10 increase on the Tea Party Affiliation index at a statistically significant level. Furthermore, legislators who have greater levels of educational attainment are less likely, on average, to affiliate with the Tea Party. Legislators representing districts located in the former Confederate South score .12 points higher on the Index, at a high statistically significant level. Military service, a common trait among Republican politicians, has the same size and certainty in its effect. While these isolated effects may appear modest, the average Republican state legislator in our sample scored around .45 on the Tea Party affiliation index. Especially when taken together –if a legislator is religiously-oriented, ideologically conservative, and located in the South (not an uncommon combination) – these characteristics add up to meaningful affiliation with the Tea Party, and strongly support Hypothesis 1.

One interesting juxtaposition between legislator- and district-level variables is the effect of race. As we expect, nonwhite legislators are both substantively and statistically less likely to affiliate with the Tea Party. At an effect size of .38, this represents the largest substantive effect on Tea Party affiliation in the data, and seems to indicate that theories about the Tea Party that emphasize the importance of racial grievance and white identity have merit. And yet we also see that on the voter side, higher proportions of white constituents are negatively associated with Tea Party affiliation, although the result is not statistically significant. This finding runs against expectations which would predict that less racially diverse districts would be more likely to elect Tea Party legislators. However, some previous research has found null effects for racial animosity as a driver of Tea Party support among voters (Hood, Kidd and Morris 2015). Future analyses should explore these somewhat contradictory findings relating legislator and voter race to Tea Party affiliation.

In keeping with trends showing an ever-increasing gender gap between the Democratic and Republican Parties, being female appears to lessen the extent of Tea Party affiliation in a state legislator, though the effect – while substantively large – is not statistically significant. Other characteristics more commonly associated with Republicans, like business experience and older age, tend to point in the expected direction but fail to reach meaningful levels of statistical significance. Overall, these findings confirm that Tea Party affiliation is in many ways emblematic of more extreme Republicanism.

The results for variables measuring the *Anti-Establishment Hypothesis* (H2) are much more straightforward. The five legislator-level characteristics that capture anti-establishment orientation all predict Tea Party affiliation, and nearly all do so with high levels of statistical significance. Prior state or local political experience, legislative experience in the chamber, and whether a legislator is a party leader in the chamber, are all statistically significant, and predict lower affiliation with the Tea Party. Figure 4 displays predicted scores on the Tea Party Affiliation Index based on different lengths of service in the state legislature. Less experienced legislators score over a .5 on the scale (above the mean for the sample), while long-serving legislators score as low as .2 (well below the mean), a more than 150% decrease. These longer-serving legislators are more likely to have stronger ties with the party, and are less open to non-institutional forces that threaten the status quo. These results confirm our expectations presented in Hypotheses 2 (*Anti-Establishment Hypothesis*).

[Figure 4 about here]

### Conclusion

In 2009, the Tea Party stormed onto the political scene and helped redefine the landscape of American politics. While the apex of the movement occurred in the first few years of the Obama presidency, its mission and principles are still at the forefront of the ideological and establishmentarian struggle within the Republican Party today. The Tea Party is called the most important political movement of the 21<sup>st</sup> century (Gervais and Morris 2018), and it is difficult to imagine the current incarnation of the Republican Party without it. Gervais and Morris (2018) argue that the Tea Party capitalized on divisions within the Republican Party and laid the groundwork for anti-establishment sentiment and populist resentment. Donald Trump amplified these fault lines and rode the politics of grievance all the way to the White House. As such, there is plenty of contemporary rationale for exploring the Tea Party's continued influence.

Scholarly work on the Tea Party has largely focused on the behavior of the movement's members, with some research on the actions of members of Congress. However, there has been a scarcity of work focusing on the effects of the Tea Party on elected representatives at the state level. Utilizing a dataset of legislators across 13 states for the years 2010 to 2013, we examined both legislator and district characteristics that are likely to predict greater Tea Party affiliation. Our results indicate some important patterns for state legislators' association with the Tea Party, and suggest two broad but equally crucial roles they play within the modern Republican Party.

First, we found that in most cases, legislators are more likely to associate with the Tea Party when they more closely fit the extreme archetypical model of the modern Republican Party. Tea Party legislators are whiter and more conservative than the average Republican legislator. In line with the observed overlap between the Tea Party movement and the Christian Right movement, our results show that legislators who publicly promote their religious adherence are also more likely to associate with the Tea Party. Like white Republicans generally, they also have statistically lower levels of educational attainment, and are more likely to have served in the military. In addition, we confirm the notion that the southern part of the country (particularly the former Confederate states) became the epicenter of Tea Party activity, finding that southern state districts are more likely to elect legislators who affiliate with the movement.

However, other equally-consistent predictors of legislators' affiliation with the Tea Party are those related to anti-establishment political sentiment. Measures that capture the "newcomer" status of legislators (e.g., no prior political experience, little legislative experience, and no party leadership experience) are highly predictive of Tea Party association. Crucially, these findings establish that while the Tea Party is in many ways simply a far-right wing of the Republican Party, it is also a truly factional group, defining itself not just by its conservatism and demographic identities, but also by an anti-establishment sentiment that fundamentally alters political and policy fights within the modern GOP.

The role of race in arbitrating the relationship between legislators and the Tea Party remains an open question. We expected that racial characteristics would predict Tea Party affiliation among state legislators, since the movement was thought to have been motivated, in part, by rising racial resentment. We find differing effects for legislator- and district-level measures of race that raise questions about whether the characteristics of voters or elites are more explicitly predictive of factionalization within the party. Future research should readdress this finding with more refined racial measures.

These findings also offer important lessons about the nature of intraparty factions more broadly, and what defines them. While many, if not most similar movements throughout history are thought of simply as ideologically extreme subsets of a major party, these groups are also truly factional – that is, defined in many ways by their exclusion from (and their stated goals of disrupting) the party establishment. This is a particularly important distinction in contemporary American politics. As the two major parties have become better-defined ideologically and demographically, Americans have more clarity than they have had in decades about which party they “belong” to, and as a result, persuasion of members of the opposite party has become increasingly difficult in the legislative and electoral spheres. Therefore, for many elected officials, the zone of disagreement has shifted from outside to inside the party. Factions like the Tea Party, and to a lesser extent, the DSA are seeking not just to pull their respective major parties to the ideological extremes, but to disrupt the organizational status quo within them and decentralize power from traditional party structures. In this paper, we have shown that even at the subnational level of elected government, these latter factors are every bit as defining of these movements than simple ideological extremism.

Finally, there remains significant and more specific debate about the lasting impact of the Tea Party movement. While the inception of the movement occurred during the presidency of Barack Obama, its effects are still reverberating through American politics today. Will the Tea Party ultimately recast the Republican Party, or will it be purged from it? A movement like the Tea Party can represent extreme, yet vocal interests, and have an important effect on the political system, especially as an intraparty faction. The Republican establishment and the principles represented by the Tea Party continue to fight over influence. A significant part of this battle takes place in the states, where both activists and candidates are groomed and where representation is much more consequential and direct.

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<sup>1</sup> The House Freedom Caucus in Congress and its namesake in the states are considered contemporary offshoots of the Tea Party movement. Its members are mostly former members of the Tea Party Caucus who express similar views about a desire for a rightward shift on fiscal and social issues and to transfer power away from leadership to the rank-and-file (Desilver 2015).

<sup>2</sup> The rebranding of the Tea Party Caucus to the Freedom Caucus in Congress and the states does not change the faction designation because the same principles are being promoted.

<sup>3</sup> Religiosity refers to religious identification and church attendance of state populations and is used for the purpose of describing state rankings and not statistical analysis. We use religious identification of state legislators in our models.

<sup>4</sup> It is possible that a legislator could attend a Tea Party meeting or rally without being invited or without the knowledge of Tea Party organizers, but without information about such an occurrence, we assume that both entities at least consent to the presence of the legislator.

<sup>5</sup> We do not distinguish between attachment and support, but notably, a factor analysis run on our five component Tea Party Affiliation measures does indeed produce two separate dimensions of factor scores.

<sup>6</sup> As a robustness check, we also collapsed the Index variable into a simple binary indicator. Legislators who are observed to associate with the Tea Party on any of our five measures are assigned a 1; all others a 0. Random-effects logistic regression analysis confirm the substance of our main findings, the results of which can be found in Table A1.3 in the Appendix.

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<sup>7</sup> Similar to Karpowitz, et al. (2011), we identified Tea Party organizations and legislators that explicitly adopted the “Tea Party” label or were identified by news organizations as being affiliated with the Tea Party movement. We used both local and national news accounts that had information about legislators’ association with the Tea Party.

<sup>8</sup> The policy experience variable denotes occupational background in policymaking, rather than party background/campaigning.

<sup>9</sup> We code all districts in former Confederacy states in our dataset (Alabama, Florida, North Carolina, South Carolina, and Texas) as 1 and all other states as 0. We expect that state legislators who represent districts in the former Confederate states are more likely to associate with the Tea Party.

<sup>10</sup> For chamber polarization, we use Shor and McCarty’s (2014) aggregated ideal-point measures.

<sup>11</sup> We use the standard Squire (2007) index for a continuous measure of legislature professionalization.

<sup>12</sup> We considered the use of alternate specification strategies to further account for repeat observations of legislators in our data. For example, clustering standard errors by legislator is one possible step, but one we feel is unnecessary since we do not suspect autocorrelation or heteroskedasticity in our errors. We also considered using only one observation per legislator – or, even more conservatively, using only one year of observations. But, in addition to significantly reducing the N, it would also throw away substantial variation in a number of measures at both the district and legislator levels that do change over time. Keeping repeat observations while using random effects allows us to account for the fact that these observations aren’t independent, while also leveraging as much variation as possible in this rich dataset. All alternate specifications described here produced fairly robust results that did not change the main findings of the paper.

<sup>13</sup> An alternative method would be to establish random effects by state or district as opposed to legislator. We argue that since legislators are the primary units of analysis of interest in this project, random intercepts should be used at the legislator-level. However, alternate specifications produce broadly similar results.