

Trading Places, Trading Platforms: The Geography of Realignment

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Abstract

In advanced plurality countries, previously protectionist Left parties now favor free trade, while formerly pro-trade Right parties are increasingly proponents of protectionism. At the same time, the Right has lost its appeal among college-educated citizens; Left parties have gained these voters but have lost support among the uneducated. In this paper, I present a formal theoretical framework for understanding these otherwise puzzling realignments. Drawing on research in economic and political geography, I argue that economic forces like trade cause college-educated workers to move from low-density constituencies controlled by the Right to high-density constituencies controlled by the Left. To satisfy their increasingly educated constituencies, Left incumbents adopt more pro-trade positioning, while Right platforms increasingly endorse protectionism. Due to changing party platforms, college-educated voters switch their support to the Left, while uneducated voters defect to the Right. I find empirical support for all observable implications of my theory.

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Introduction

Despite the surge of academic interest in understanding the contentious politics of trade in advanced democracies, existing research fails to address the emerging realignment of parties in advanced plurality countries¹ with regards to trade policy. Previously protectionist Left parties are now endorsing globalization,² while formerly “free market” Right parties are increasingly becoming the parties of protectionism.³ At the same time, Left parties in advanced plurality countries have become more popular with highly educated citizens, while Right parties have gained uneducated supporters at the expense of losing support among educated voters.⁴ What is driving these puzzling realignments? In this paper, I argue that these related realignments are both a result of internal migration:⁵ as skilled individuals sort into high-density constituencies controlled by the Left, Left parties increasingly endorse free trade and Right parties turn towards protectionism.⁶ As

¹Plurality systems here are countries with geographically-defined single-member constituencies in which voters cast ballots for individuals, rather than parties. [Cox \(1990\)](#) provides a similar definition.

²Take, for example, the shift in the U.K. Labour party’s position, from its 1983 platform arguing “We must therefore be ready to act on imports directly...to safeguard key industries... using tariffs and quotas, if these prove necessary” to it’s most recent platform in 2017, arguing “Labour is pro-trade...prosperity depends on minimising tariff and non-tariff barriers.”

³In the United States, this shift predates Trump; examining Republican platforms from 2000 to 2012, [Kuk, Seligsohn and Zhang \(2018\)](#) find a persistent trend towards a more pessimistic tone about trade (concerns about “fair trade”) and away from prior enthusiasm for “free and open trade.” [Cerrato, Ferrara and Ruggieri \(2018\)](#) find a consistent trends towards protectionism in Republican presidential campaign rhetoric from 2008 to 2016.

⁴Take, for example, the United States; college-educated voters had supported Republican presidential candidates for decades, but in 2016 college-educated voters preferred Clinton to Trump by a 9 point margin, while voters without a college education (a traditionally left-leaning group) supported Trump by 8 percentage points ([Tyson and Maniam 2016](#)). Despite the British Labour party’s long-history as a working-class party, educated voters favored Labour in the 2017 election by a substantial margin, while those in the lowest educational category preferred the Conservatives by more than 20 percentage points ([Curtis 2017](#)).

⁵[Gallego et al. \(2016\)](#) estimates that 31 percent of English citizens relocated to a different parliamentary constituency at least once between 1991 and 2008. About 20 percent of Americans change counties over a 5 year period ([Glaeser and Gottlieb 2009](#)). [Mummolo and Nall \(2017\)](#) find that internal migration patterns in the U.S. are determined by economic factors, not by partisan sorting. Though international migration is often analyzed in International Political Economy, internal migration has been neglected as a salient factor for understanding the politics of globalization. For more on the contentious politics of internal migration, see [Gaikwad and Nellis \(2017\)](#); for an analysis of the relationship between attitudes towards internal and internal migration, see [Singer and Quek \(2017\)](#).

⁶I am not the first to link internal migration to political change in the United States. An extensive literature in American Politics finds that migration into and out of the American South was an important contributor to the civil rights realignment in the second half of the 20th century ([Beck \(1977\)](#) and [Campbell 1977](#)). [Brown \(1988\)](#) and [Frendreis \(1989\)](#) argue that migration into an area changes the preferences of the local electorate. Examples include

a consequence of changing party positioning, educated voters defect from the Right to the Left, while less educated citizens increasingly support the Right.

My argument links a persistent political geography to an evolving economic geography. In advanced plurality countries, Left incumbents are responsive to high-density constituencies, while Right incumbents control low-density constituencies.⁷ Research in American Politics finds evidence of responsiveness to constituency preferences; [Canes-Wrone, Brady and Cogan \(2002\)](#) contend that voters do not re-elect incumbents whose positions are out of step with theirs, so politicians adopt the preferred policy positions of their constituents.⁸ Policymakers exhibit “dynamic responsiveness”⁹ to changing constituency preferences in the U.S.,¹⁰ the U.K.¹¹ and Canada.¹² In the trade context, [Bailey \(2001\)](#) finds that members of Congress (both House and Senate) who represent skilled constituencies are more likely to vote in favor of trade agreements; this finding has been widely replicated (for recent examples, see [Milner and Tingley \(2011\)](#), [Owen \(2017\)](#) and [Conconi et al. 2018](#)). I therefore expect that the migration of skilled workers to high-density constituencies will induce more pro-trade positioning by Left incumbents, while a “brain-drain” of highly educated workers from low-density electorates yields more protectionist positioning by the Right. Due to changing party positioning, I predict educated voters will increasingly support the Left, while uneducated voters should increasingly turn out for Right candidates.

To explore these dynamics, I embed a spatial equilibrium model from economic geography within a formal model of incumbents choosing party platforms. I test all observable implications of my model in Australia, Canada, the United Kingdom and the United States, and find strong and

the migration of affluent, liberal Americans into Tennessee ([Lyons and Durant 1980](#)), as well as the influx of educated voters into the Rocky Mountain West ([Robinson and Noriega 2010](#)).

⁷For more on the relationship between population density and party politics in advanced plurality countries, see [Rodden \(2019\)](#).

⁸Similarly, [Ansolabehere and Jones \(2010\)](#) find that American voters’ beliefs about their legislator’s positions are closely related to the legislator’s actual voting record and the policy brand of the legislator’s party. Furthermore, citizens hold legislators accountable if the legislators voting record diverges from the voter’s own policy preference.

⁹I borrow this term from [Caughey and Warshaw \(2018\)](#).

¹⁰[Stimson, MacKuen and Erikson \(1995\)](#) find that members of the U.S. House are especially likely to maintain their seats by adapting their positions to changing public opinion; they refer to this preemptive shift in positioning as “rational anticipation.”

¹¹[Hakhverdian \(2010\)](#)

¹²[Soroka and Wlezien \(2004\)](#)

consistent evidence in favor of my theory. Until recently, Republican constituencies were more educated than Democratic constituencies; today, Democratic constituencies are disproportionately educated. The relative skill of Left constituencies has risen across other advanced plurality countries as well. At the same time, Left parties have become relatively more supportive of free trade, and relatively more popular with college-educated voters.

My findings challenge a substantial literature in American Politics and Comparative Politics linking partisan realignments to “critical elections,” or distinct junctures of drastic political change.¹³ Instead, I find evidence of gradual political change resulting in realignment.¹⁴ I also challenge accounts of voter realignments that emphasize the emergence of a new dominant voter cleavage, such as [Schattschneider \(1960\)](#); I argue that voters change the party they support even though the issue cleavage (tariff policy) stays the same.¹⁵ My argument is consistent with other evidence of policy-driven changes in partisan voting in the United States, such as the defection of racially conservative Southern whites from the Democratic party in response to the party’s endorsement of civil rights.¹⁶

¹³For examples in American Politics, see [Schattschneider \(1956\)](#) and [Key Jr \(1955\)](#). In the European context, [Hooghe and Marks \(2018\)](#) argue for a critical junctures approach to realignments.

¹⁴The rise of a more protectionist Right and a pro-market “New Left” have largely been studied separately. One possible factor driving party re-positioning on trade is changing voter preferences; exposure to import competition seems to induce “authoritarian” preferences and support for far-right parties ([Cameron Ballard-Rosa and Scheve \(2018\)](#), [Cerato, Ferrara and Ruggieri \(2018\)](#), [Colantone and Stanig \(2017\)](#) and [Malgouyres 2017](#)). While preference change in favor of authoritarianism can explain more protectionist positioning by the Right, it cannot explain why Left parties have become more supportive of free trade in advanced plurality countries. A separate literature studies the emergence of a “New Left” in advanced democracies that is increasingly capitalistic and supportive of free trade. For example, [Ford and Goodwin \(2014\)](#) argue that the UK’s Labour party abandoned its working class constituency to gain the support of the expanding university-educated middle class (see also [Evans and Tilley 2012](#)). However, arguments of this nature cannot explain why Right parties in advanced plurality countries have become more protectionist at the same time that a “New Left” has emerged.

¹⁵[Piketty \(2018\)](#) finds evidence of voter realignments in the United States, France and the United Kingdom. He offers two explanations for these realignments: the rising salience of immigration (which makes uneducated voters who once supported the high-tax Left embrace the low-tax but anti-immigrant Right) and the expansion of higher education (highly educated voters support taxation to fund public spending on education). Looking only at the United States, [Kitschelt and Rehm \(2018\)](#) also find evidence of a gradual defection of educated voters to the Democrats and of less educated voters to the Republicans; they argue that this voter realignment has emerged due to the growing salience of “second-dimension” politics (i.e. social issues) relative to traditional class issues. While the theories put forward in [Piketty \(2018\)](#) and [Kitschelt and Rehm \(2018\)](#) are not necessarily inconsistent with a partisan realignment on trade, they do not offer an explicit explanation of changes in party positioning on protectionism.

¹⁶See [Kuziemko and Washington \(2018\)](#) for more on policy voting in the United States. Furthermore, [Fowler](#)

My findings also add nuance to a disagreement in the literature exploring whether exposure to globalization increases or diminishes future support for trade.¹⁷ For example, [Milner \(1988\)](#) argues that trade creates pro-globalization constituencies among firms with international interests. Examining support for trade among political parties, [Milner and Judkins \(2004\)](#) find that exposure to globalization leads to higher support for trade among all parties: “Parties in countries that are more open (holding size and level of development constant) are less protectionist. . . As globalization grows, the differences among parties in a country over trade policy decline, as all become more free trade oriented.”¹⁸ However, more recent work finds a link between trade exposure and backlash to globalization at the voter level ([Autor \(2016\)](#), [Colantone and Stanig 2017](#)) and at the party platform level ([Burgoon 2009](#)). I present a middle ground between these competing findings: in plurality countries, trade exposure leads to more support for trade among Left parties, but also more enthusiasm for protectionist policies among Right parties.

Political and Economic Geography

My theoretical argument links political and economic geography. [Rodden \(2019\)](#) demonstrates a robust relationship between population density and Left voting in advanced plurality countries. Though it initially emerged out of the working class politics of the Industrial Revolution, “urban-

[\(2018\)](#) finds that “intoxicated partisans, if they exist, are a small share of the American electorate, and policy voting is more prevalent.” In the United Kingdom, voters are motivated primarily by policy concerns, not partisan attachments ([Schonfeld and Winter-Levy 2019](#)). More generally, [Carsey and Layman \(2006\)](#) write that “Issue-based change in party identification should occur among individuals who are aware of party differences on an issue and find that issue to be salient.”

¹⁷There is a long-standing literature on the effects of globalization on party systems and societal cleavages more generally. [Rogowski \(1989\)](#) argues that trade exposure either produces class conflict or urban-rural conflict depending on the relative abundance of labor, capital and land. Alternatively, [Kriesi et al. \(2006\)](#) argue that globalization “transforms” the structure of the Western European political space as conflict between winners and losers of globalization crosscuts other cleavages like the religious-secular or urban-rural divides.

¹⁸[Milner and Judkins \(2004\)](#) find that right parties are more pro-trade than left parties in advanced democracies, and argue that this is because right-wing parties depend more on capital owners for support, whereas left parties depend more on labor. In opposition to this finding, I demonstrate that Right parties in plurality countries have become more protectionist as globalization has progressed. Like Milner and Judkins, [Dutt and Mitra \(2005\)](#) also focus on capital and labor, predicting that left-wing governments will be protectionist in capital-abundant countries. However, their model cannot account for an increasingly pro-trade left in capital-abundant advanced democracies.

rural polarization” persists in Australia, Canada, the United States, and the United Kingdom.

I consider the interaction of this relatively constant political geography with an evolving economic geography.¹⁹ Research in economic geography finds that skilled workers now earn significantly higher wages in high-density U.S. Metropolitan Statistical Areas.²⁰ Until a few decades ago, both skilled and unskilled workers earned higher wages in urban areas, but “urban non-college workers currently perform substantially less skilled work than in prior decades. This deskilling reflects the joint effects of automation and international trade, which have eliminated the bulk of non-college production, administrative support, and clerical jobs... attenuating, to a startling degree, the steep urban wage premium for non-college workers that prevailed in earlier decades.”²¹ I now verify that the same economic dynamics hold at geographic levels that are relevant for American trade politics, namely congressional districts (the House of Representatives) and states (the Senate). I utilize American Community Survey data from 2016 on the median earnings of workers whose highest level of education is a bachelor’s degree (“skilled”), as well as the median earnings of workers whose highest level of education is a high school diploma (“unskilled”). I then subtract the median gross rent (contract rent plus the cost of utilities) from these wages to calculate the median skilled and unskilled “real” wages. In Figure 1, I plot real wages against log population density; as expected, I find that skilled workers earn higher real wages in denser congressional districts and states; the same does not hold true for unskilled workers, who actually earn lower real wages in denser congressional districts.

¹⁹In *Spending to Win*, Rickard finds that politicians in plurality systems favor geographically concentrated interest groups, while geographically diffuse interest groups perform better under proportional representation. However, Rickard takes economic geography as given, analyzing “the political implications of existing patterns of economic geography”(Rickard (2018), page 31). By contrast, I allow economic geography to endogenously evolve by employing spatial equilibrium modeling tools, enabling me to assess the implications of changes in economic geography for partisan positioning and voter behavior.

²⁰See, for example, Lindley and Machin (2014).

²¹Autor (2019), page 1.

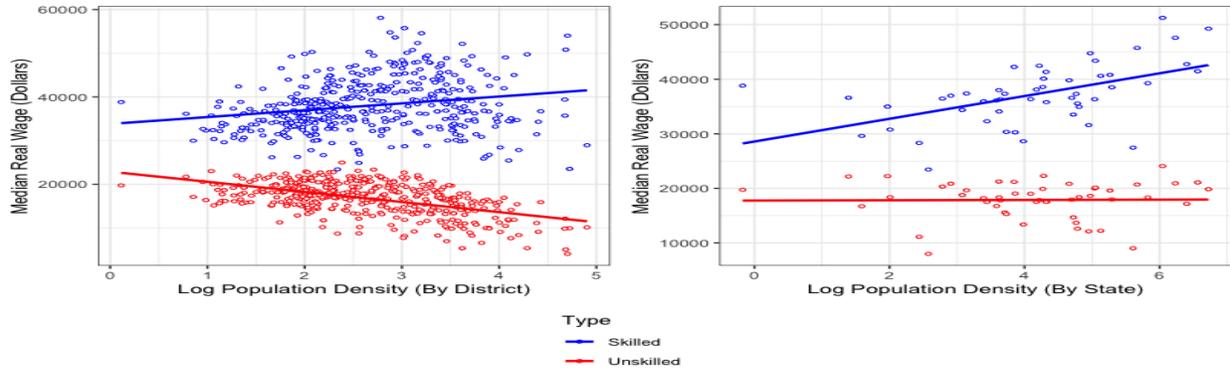


Figure 1: *Real Wage by Log Population Density*

In U.S. states and congressional districts, skilled real wages are increasing in population density.

These geographic differences in real wages are a source of spatial “skill-sorting” in advanced countries. For example, [Lindley and Machin \(2014\)](#) find evidence of “increased spatial concentration of more educated workers” in U.S. Metropolitan Statistical Areas between 1980 and 2010.²² Relatedly, [Diamond \(2016\)](#) finds that American “cities which became disproportionately productive for high skill workers attracted a larger share of skilled workers. . . driving up local rents. . . low skill workers were less willing to pay the price of a lower real wage. . . leading them to prefer more affordable. . . locations.”²³ In Canada, because of “the interprovincial migration process, human capital is redistributed from the more rural to the predominantly urban provinces.”²⁴

²²[Lindley and Machin \(2014\)](#), page 131.

²³[Diamond \(2016\)](#), page 479. Similarly, [Ganong and Shoag \(2017\)](#) find that the “divergence in the skill-specific returns to moving to high-income places” and rising costs of housing in high productivity areas have deterred low skill migration to high productivity (high rent and high wage) areas.

²⁴Skilled workers are also sorting into high-density areas in advanced Proportional Representation democracies. In Spain, [De la Roca \(2017\)](#) finds that “migrants to big cities are positively selected in terms of education, occupational skills, and individual productivity;” other research finds evidence of skill-sorting in Italy ([Mion and Naticchioni 2009](#)) and Sweden ([Ahlin et al. 2016](#)).

Modeling the Interaction of Political and Economic Geography

I now put forward a theoretical framework that conceptualizes political parties as groups of office-seeking politicians; this view echoes [Aldrich \(1995\)](#), who argued “It is political leaders... *those who seek and those who hold elective office*—who are the central actors in the party.”²⁵ National party platforms are determined by self-interested party leaders who must cater to their particular (geographically-defined) constituencies to win re-election.²⁶ I argue that migration-induced changes in the demographics (and thus, the preferences) of partisan constituencies yield shifts in party positioning.

In this section, I present an original formal model that unifies economic and political geography into one theoretical framework. The model allows me to tease out the political implications of an endogenously evolving spatial economy. I embed a spatial equilibrium framework from economic geography (largely based on [Moretti 2011](#))²⁷ within a game-theoretic model of party platform-setting by incumbent legislators (an application of [Snyder 1994](#)). The model generates predictions about the relative skill of Right-controlled constituencies over time, as well as the relative positioning of Right parties on trade and the relative popularity of Right parties with college-educated voters. The model also presents the conditions for a partisan realignment on trade and for a voter realignment by skill level.

The Political System

In the political system, there are two constituencies: low-density constituency a and high-density constituency b . There are two parties, the Left (l) and the Right (r). Candidate p_c of party $p \in (l, r)$ competes in constituency $c \in (a, b)$ in election period $t \in (1, 2)$. At the beginning of the game

²⁵[Aldrich \(1995\)](#), pages 19-20. Similar views of parties can be found in other foundational analyses of party politics, such as [Downs et al. \(1957\)](#) and [Schlesinger \(1994\)](#). For an alternative view of parties, see [Cohen et al. \(2009\)](#) (the UCLA school). For a critique of the “UCLA school,” see [McCarty and Schickler \(2018\)](#).

²⁶Incumbents cannot easily move between constituencies, as there may be legal requirements for running for election in a particular place. Furthermore, incumbents may have organizational and reputational advantages within their own constituencies, but not in others.

²⁷The spatial equilibrium framework was initially explored in [Rosen \(1979\)](#) and [Roback \(1982\)](#).

($t = 1$), the incumbent in constituency b is l_b , while the incumbent in constituency a is r_a ; this initial condition operationalizes the historical relationship between population density and Left voting in advanced plurality countries.²⁸ Incumbents set their parties' platforms; formally, l_b gets to set the Left's tariff policy τ_{l1} (which l_a must also commit to),²⁹ while r_a gets to set the Right's tariff policy τ_{r1} (which r_b must also commit to).³⁰ Incumbents care about the success of their party, but receive no utility if they do not win their own re-election campaigns (i.e. lexicographic preferences over winning their own elections).

In each constituency, the candidate who wins the majority of votes wins the election; formally, a candidate in constituency c must win the vote of the median voter in constituency c , m_c . Voters are not strategic, and simply vote for the candidate in their constituency whose party's platform is closest to their ideal tariff policy. If m_c prefers tariff τ_{m_c} , l_c wins the constituency if $|\tau_l - \tau_{m_c}| < |\tau_r - \tau_{m_c}|$, and r_c wins if $|\tau_r - \tau_{m_c}| < |\tau_l - \tau_{m_c}|$.³¹

The Spatial Economy

I now introduce the spatial economy. There are S skilled workers and U unskilled workers. θ_c denotes the number of workers of type $\theta \in (S, U)$ in constituency c . Each worker's utility is their real wage, which is their skill and constituency-specific nominal wage $W_{\theta c}$ for skill type $\theta \in (S, U)$

²⁸See [Rodden \(2019\)](#) for more on this relationship.

²⁹Tariff policy is assumed to be a "pliable policy," i.e. a policy dimension in which parties are open to changing their policies in response to electoral incentives. These differ from "fixed policies," which might include taxes or social issues. For more on this distinction, see [Grossman and Helpman \(1996\)](#).

³⁰I assume that challengers cannot deviate from their party's platform by creating their own policy platforms. In parliamentary countries like Australia, Canada and the United Kingdom, candidates are directly associated with the legislative agenda of their party encapsulated in the national party platform. Even in a Presidential system like the United States, voters can easily distinguish cross-partisans, but cannot distinguish policy positions between co-partisans; voters know much about the policies supported by parties, but little about the policies supported by particular candidates ([Snyder and Ting 2002](#)). The "nationalization" of Congressional elections in the U.S. (see [Hopkins \(2018\)](#), [Sievert and McKee \(2018\)](#), and [Jacobson 2015](#)) has further diminished the ability of particular candidates to differentiate themselves from their party's national brand. This suggests that when a group of self-interested incumbents chooses a party's national "brand" or platform, all candidates from that party become associated with those policies, including non-incumbent challengers.

³¹Ties occur with probability 0, as I assume that incumbents win if the platform positions are the same (incumbency advantage).

and constituency $c \in (a, b)$ minus their constituency-specific cost of rent ρ_c .³² Workers of each skill type seek to maximize their real wage; migration occurs until workers of each skill type are indifferent between living in constituency a and constituency b (spatial equilibrium).³³ Formally, this means $W_{\theta b} - \rho_b = W_{\theta a} - \rho_a$ in equilibrium.³⁴

Wages for skill type θ in constituency c are increasing in labor productivity $X_{\theta c}$ and decreasing in θ_c ($W_{\theta c} = X_{\theta c} - \theta_c$).³⁵ I assume the price of rent in constituency c is directly proportional to the number of people living in constituency c ($\rho_c = S_c + U_c$).³⁶

Trade

Following each election, Nature chooses either constituency a or b as the “median constituency.” Party p that wins the median constituency in election period t sets nation-wide government tariff policy $\tau_{Gt} = \tau_{pt} \in [0, 1]$, where $\tau_G = 1$ indicates autarky and $\tau_G = 0$ signifies free trade.³⁷ Starting from autarky, trade boosts the productivity of skilled labor in the high-density constituency (X_{Sb})

³²There is no commuting in the model, which may be a realistic assumption given the size of electoral constituencies. There is also no home-ownership in the model; while this is not a realistic assumption, including home-ownership is unnecessary to show the interesting spatial dynamics of the model. Furthermore, one can think of the rent parameter ρ_c as a proxy for the general cost of living in constituency c ; [Moretti \(2013\)](#) finds that rising housing costs (in US Metropolitan Statistical Areas) are associated with increases in the cost of local services.

³³I am assuming away moving costs in this analysis; though migration costs would reduce the total level of internal migration, the direction of migration would not change. None of the results of the model depend on a particular level of population movement, only on the direction of skilled and unskilled migration.

³⁴See [Kennan and Walker \(2011\)](#) for evidence that individuals migrate in response to economic incentives.

³⁵I assume $X_{Sc} > X_{Uc} > 1$ such that wages are never negative.

³⁶This simple equation captures the positive relationship between demand for housing and the price of housing (assuming imperfectly elastic housing supply); I chose this linear functional form for reasons of parsimony, but it is not necessary for the main results.

³⁷For simplicity, I do not include the World Trade Organization in the model. Though all of the advanced plurality democracies in my sample are in the World Trade Organization, they often apply tariff rates below the WTO Most-Favored-Nation (MFN) rates, suggesting that they can increase tariffs from those levels without violating WTO rules. For example, according to the World Trade Organization’s “World Tariff Profiles 2017” report, Australia applies a lower MFN tariff rate (2.5 percent) than the bound rate (9.9 percent) on all products; the same can be said for Canada (4.1 percent average applied MFN tariff rate, 6.5 percent bound rate). Furthermore, [Rosendorff \(2005\)](#) notes that there are institutional mechanisms allowing states to temporarily suspend compliance with international trade law in times of intense domestic political support for protectionism. The ongoing trade war between the United States and China following the implementation of tariffs by the Trump administration casts further doubt on the ability of the WTO to insulate trade from protectionist pressures in domestic politics.

inter-temporally: $X_{Sb2} = X_{Sb1} + (1 - \tau_{G1})\Delta$ with $\Delta > 0$. Unskilled voters are more protectionist than skilled voters; skilled voters have tariff preferences $\tau_S \sim U(0, 0.5)$ and unskilled voters have preferences $\tau_U \sim U(.5, 1)$.³⁸

Stage Game

The stage game in period t is as follows:

1. Incumbents set party platforms τ_{lt} and τ_{rt}
2. Elections are held
3. Nature chooses either a or b as the median constituency
4. Party p in control of the median constituency implements $\tau_{Gt} = \tau_{pt}$

Between $t = 1$ and $t = 2$, workers relocate across constituencies to maximize their expected utility (until spatial equilibrium is achieved).

Because there are many possible Nash Equilibria of this game, I focus on the (unique) “Trembling Hand Perfect Equilibrium,”³⁹ which allows for players to make mistakes and to play any strategy (in this case, for incumbents to choose any party platform) with positive probability.

Persistent Political Geography

To maximize the probability of winning re-election, the Left incumbent sets their platform at the ideal point of the high-density constituency’s median voter, while the Right incumbent chooses the tariff position preferred by the low-density constituency’s median voter.⁴⁰ Because incumbents

³⁸The relationship between college education and support for trade is robustly supported in the literature (see, for example, [Margalit \(2012\)](#), [Hainmueller and Hiscox \(2006\)](#) and [Scheve and Slaughter 2001](#)).

³⁹[Selten \(1988\)](#)

⁴⁰Left incumbent l_b chooses $\tau_l = \tau_{m_b}$, while Right incumbent r_a chooses $\tau_r = \tau_{m_a}$. This is because it is possible that the other party’s incumbent will choose the tariff desired by your own constituency’s median voter (this occurs with positive probability using the Trembling Hand refinement). It is therefore a strictly dominant strategy for incumbents to position at their own constituencies’ median tariff positions (otherwise, there is positive probability of losing their seats).

cater to their constituencies' median voters, challengers from both parties lose their elections.

Lemma 1. *Political geography persists between periods (incumbents keep their seats).*

Evolving Economic Geography (“Skill-Sorting”)

Exposure to trade boosts the productivity of skilled labor in the high-density constituency. Skilled workers migrate in to take advantage of higher wages, while rising rents force unskilled workers out.

Lemma 2. *Trade exposure induces internal migration such that the high-density constituency becomes more skilled, while the low-density constituency becomes less skilled.*⁴¹

Shifting Skill Levels of Partisan Constituencies

Political geography persists between periods, but economic geography evolves. As skilled individuals sort into the high-density constituency controlled by the Left, the Right-controlled constituency becomes relatively less skilled.

Lemma 3. *As a result of Lemmas 1 and 2, the “Relative Skill of Right Constituencies” declines between periods.*

Re-Positioning of Party Platforms

Proposition 1 characterizes the relative protectionism of party platforms before and after trade exposure. Because the high-density constituency becomes more skilled, the Left incumbent must adapt their platform in an increasingly pro-trade direction. The reverse holds for the Right incumbent.

⁴¹ $S_{b2} > S_{b1}$ and $U_{b2} < U_{b1}$, and $S_{a2} < S_{a1}$ and $U_{a2} > U_{a1}$. It is also worth noting that $U_{b2} + S_{b2} > U_{b1} + S_{b1}$ and $U_{a2} + S_{a2} < U_{a1} + S_{a1}$. We therefore know that trade exposure causes the high-density constituency to gain population, and the low-density constituency to lose population, so we do not need to worry about the constituencies “changing types” (i.e. a low-density constituency becoming more dense or a high-density constituency becoming less dense).

Proposition 1. *As a result of internal migration, the Right becomes more protectionist, while the Left moves closer to free trade. As the “Relative Skill of Right Constituencies” declines, the “Relative Protectionism of the Right” rises.*⁴²

Trading Places, Trading Platforms: Partisan Realignment on Trade

I define a “partisan realignment on trade” as the scenario in which the Right is initially less protectionist, but subsequently becomes the relatively protectionist party.⁴³ If the low-density constituency is relatively skilled at the beginning of the game, the Right will endorse a lower tariff than the Left in Period 1. If there is sufficient “skill-sorting” between periods such that the low-density constituency becomes relatively unskilled, the Right will endorse a higher tariff than the Left in Period 2.

Proposition 2. *If the low-density constituency is initially relatively skilled and enough workers “trade places” between periods (such that the low-density constituency becomes relatively unskilled), the parties will “trade platforms” on tariff policy.*⁴⁴

Shifting Behavior of Skilled and Unskilled Voters

I will now consider the implications of my model for the relationship between skill and partisan voting. As the Right becomes relatively more protectionist, skilled voters defect to the Left, while unskilled voters become more likely to support the Right.

Proposition 3. *As a result of the rising “Relative Protectionism of the Right,” the “Relative Skill of Right Voters” declines.*⁴⁵

⁴²Formally, $\tau_{r2} > \tau_{r1}$, and $\tau_{l2} < \tau_{l1}$, so $(\tau_{r2} - \tau_{l2}) > (\tau_{r1} - \tau_{l1})$.

⁴³Formally, $\tau_{l1} > \tau_{r1}$ and $\tau_{l2} < \tau_{r2}$.

⁴⁴A partisan realignment on trade occurs if $\frac{S_{a1}}{U_{a1}} > \frac{S_{b1}}{U_{b1}}$ and $\frac{S_{a2}}{U_{a2}} < \frac{S_{b2}}{U_{b2}}$.

⁴⁵ θ_{pt} is the number of workers of type θ that vote for party p in period t . Define the “Relative Skill of Right Voters” as $\frac{S_r - S_l}{S} - (\frac{U_r - U_l}{U})$. Then we have $\frac{S_{r2} - S_{l2}}{S} - (\frac{U_{r2} - U_{l2}}{U}) < \frac{S_{r1} - S_{l1}}{S} - (\frac{U_{r1} - U_{l1}}{U})$.

Voter Realignment by Skill Level

A “voter realignment by skill level” occurs if the Right is initially more popular with skilled voters, but subsequently becomes relatively more popular with unskilled voters.⁴⁶ If the Right is relatively pro-trade, it will be more popular with skilled voters than the Left; the inverse will hold if the Right becomes relatively protectionist.

Proposition 4. *If there is a partisan realignment on trade, then a voter realignment by skill level will occur as well.*

In summary, I embed a spatial equilibrium framework within a game-theoretic model of party platform-setting by re-election driven incumbents. Trade exposure causes the high-density constituency to become more skilled, while the low-density constituency becomes less skilled. In response to changing constituency demographics, the Left incumbent adopts a more pro-trade platform than before, while the Right platform becomes increasingly protectionist. Finally, intertemporal changes in party platforms drive skilled voters towards the Left and make unskilled voters more likely to vote for the Right. If a partisan realignment on trade occurs, then a voter realignment takes place as well.⁴⁷

Empirical Analysis

I now turn to examining the empirical evidence for all predictions of the model. I begin by assessing the evidence for Lemmas 1, 2 and 3, which suggest the following observable trends over time:

1. Left (Right) incumbents consistently control high-density (low-density) constituencies
2. High-density constituencies become disproportionately skilled over time
3. The Relative Skill of Right Constituencies declines over time

⁴⁶Formally, this would mean $\frac{S_{r1}}{S} - \frac{U_{r1}}{U} > \frac{S_{l1}}{S} - \frac{U_{l1}}{U}$ and $\frac{S_{r2}}{S} - \frac{U_{r2}}{U} < \frac{S_{l2}}{S} - \frac{U_{l2}}{U}$.

⁴⁷All proofs are in the appendix.

I first undertake a quantitative case study of the United States, which has the broadest data coverage for population density, internal migration and percent college-educated of all the countries in the sample. After finding strong support for the model in the U.S., I extend my analysis to other advanced plurality countries.

Evidence of Shifting Skill Levels of Partisan Constituencies in the U.S.

Implication 1. *A majority of Democratic (Republican) Constituencies are High-Density (Low-Density)*

I first validate the assertion that Democratic incumbents maintain consistent control of high-density electoral constituencies. I divide districts by population density into a top-half (“high-density”) and a bottom-half; I then calculate what proportion of Democratic and Republican members of the House of Representatives are in high-density districts.⁴⁸ As shown below in Figure 2, a majority of Democratic members of the House are in high-density districts in all years of the sample, while a majority of Republican representatives are in low-density districts in each year.⁴⁹ I perform the same analysis for the United States Senate, finding that a majority of Democratic seats are in high-density states in each year.

⁴⁸I perform this analysis by matching congressional district-level data on population density from the United States (1990 census, 2000 census, and 2006, 2008, 2010, 2012, 2014 and 2016 American Community Surveys) to VoteView data on membership of the United States House of Representatives in those years (from the 101st, 106th, 109th, 110th, 111th, 112th, 113th and 114th Congresses, respectively).

⁴⁹The vertical gray lines indicate years of redistricting.

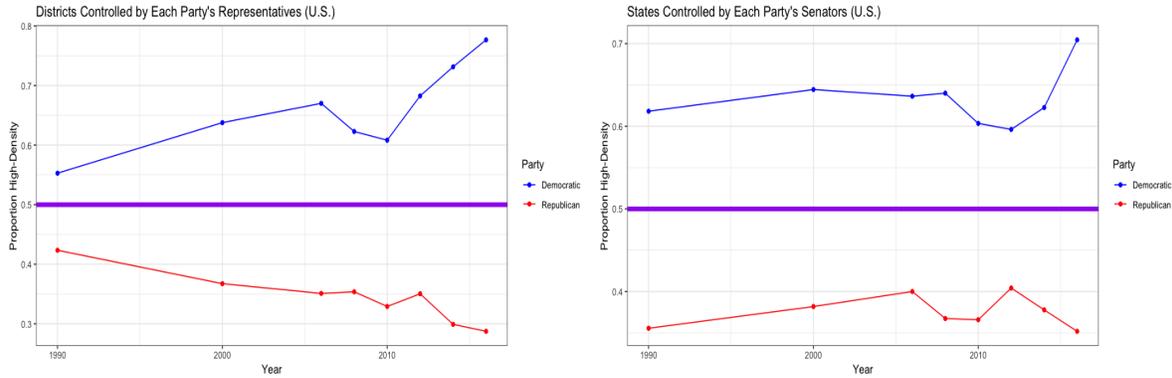


Figure 2: *Proportion of Constituencies that are High-Density (by Party)*

This plot shows that Democrats (Republicans) primarily control high-density (low-density) constituencies.

Implication 2. High-Density Constituencies Become Disproportionately Skilled Over Time

I now examine whether high-density American constituencies have become disproportionately skilled over time. I calculate the “Skill Gap” between high and low-density constituencies, which is the difference between high and low-density constituencies in average percent skilled (the percent of adults over 25 years old with a bachelor’s degree or higher). In Figure 3, I plot this measure over time for both congressional districts and states, finding evidence of a strong positive time trend. In 1990, high-density states were about as skilled as low-density states; by 2016, there was a substantial skill gap. The growing skill gaps between high and low-density states and districts are not driven by outliers, as the skill gap between the median high-density constituency and the median low-density constituency exhibits the same positive time trend.⁵⁰ It is true, however, that this skill gap has exhibited especially significant growth when comparing the densest and least dense constituencies. In 1990, the top ten percent of congressional districts in terms of density were less than one and a half percentage points more skilled than the bottom decile; by 2016, this skill gap had grown to almost ten and a half percentage points. This combination of “brain-drain” from rural areas and skilled migration into dense areas has substantial implications for partisan constituencies, as Democrats controlled 93 percent of the densest decile of congressional districts

⁵⁰See appendix for plot.

in 2016, while Republicans controlled 87 percent of the least dense decile.

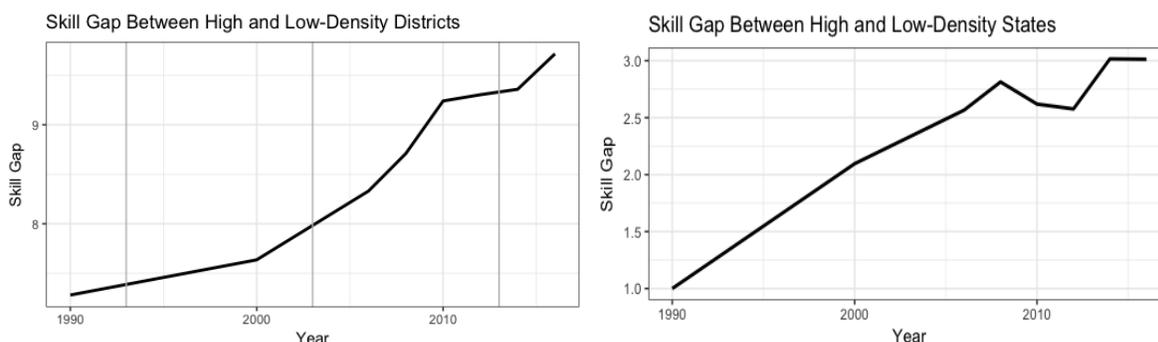


Figure 3: *Skill Gap Between High and Low-Density Constituencies*

This figure shows the growing skill gap between high and low-density constituencies in the United States.

Implication 3. *The Relative Skill of Republican Constituencies Declines Over Time*

Given that the relationship between population density and Democratic political control has persisted, an increasing relationship between population density and percent skilled should result in Democratic constituencies that are increasingly skilled (and Republican districts that are comparatively less skilled). I combine data on the proportion of college educated workers in each district from [Milner and Tingley \(2011\)](#) with more recent American Community Survey data (matched to VoteView political data) to examine the skill levels of Republican and Democratic districts over time in Figure 4. I find that the median Republican-controlled district was more skilled than the median Democratic district until 2008. The same result holds when analyzing the mean district, rather than the median (shown in the appendix). I perform the same analysis for the U.S. Senate, and find that the median Republican Senate constituency was more educated than the median Democratic Senate constituency in 1990; for the last two decades, Democratic Senate constituencies have been relatively more skilled than those controlled by Republicans.⁵¹

⁵¹In both chambers of the American legislature, Right constituencies were initially more skilled, and are now less skilled; in the model, this shift is the key theoretical condition for a partisan realignment on trade.

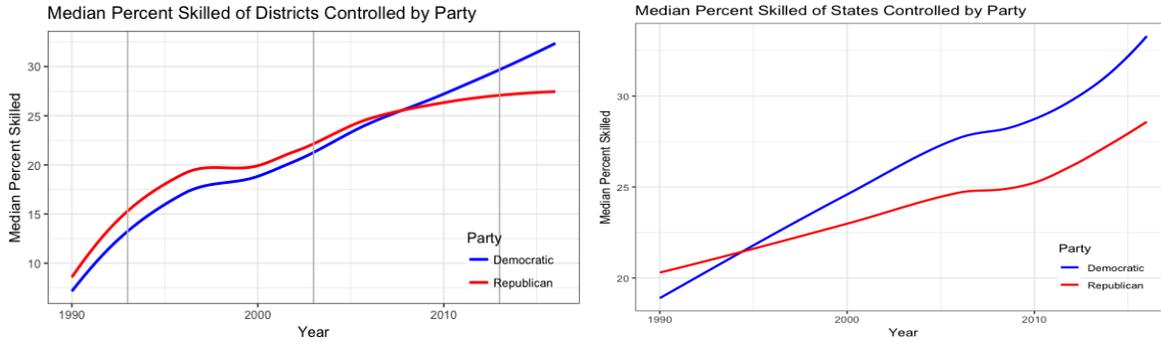


Figure 4: *Median Percent Skilled of Constituencies Controlled by Party*

This figure reveals that Democratic constituencies are now more skilled than Republican constituencies.

To negate the concern that changes in relative skill levels are due to changes in the types of constituencies each party controls (rather than through demographic change in continuously-held constituencies), I subset to constituencies held by each party throughout the whole time period in the appendix (for the House of Representatives, I must account not only for selection but also redistricting, which occurred in 1993, 2003 and 2013). In support of my argument, I find that continuously-held Republican constituencies became relatively less skilled than continuously-held Democratic constituencies over time.

To further isolate the mechanism of skill-sorting, I analyze data on county-to-county migration in the previous year (by level of educational attainment) from the 5 year American Community Survey spanning 2007 to 2011 (this is the only period for which migration by educational attainment data is available). As before, I code college and above as “skilled.”⁵² I match this migration data to population data from the same 5 year American Community Survey sample to construct a “high-density” half and a “low-density” half. At both the congressional district and state level, I calculate “net skilled migration” as the number of skilled in-migrants plus the number of unskilled out-migrants minus the number of skilled out-migrants minus the number of unskilled in-migrants. In Figure 5, I show that high-density constituencies gained skilled workers on net, while low-density

⁵²Some counties are in multiple congressional districts; I allocate counties to congressional districts by weighting districts by their share of a county’s population. The results are robust to weighting districts by their share of a county’s territory instead.

constituencies became more unskilled.

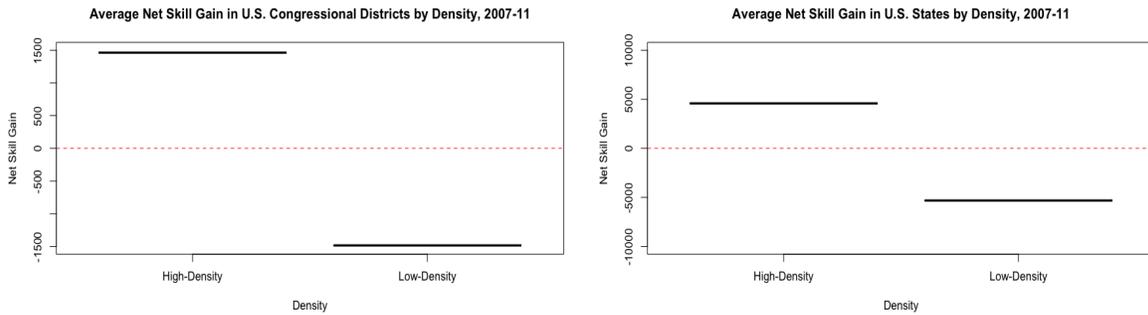


Figure 5: *Average Net Skill Gain From Internal Migration (by Density)*

High-density (low-density) constituencies have gained (lost) skilled workers through internal migration.

I then assess whether Democratic (Republican) constituencies have gained (lost) skilled workers due to internal migration. I subset to House and Senate constituencies that were held by the same party throughout the whole time period in question. Figure 6 confirms that Republican constituencies experienced “brain-drain,” while Democratic constituencies experienced a net inflow of skilled labor.

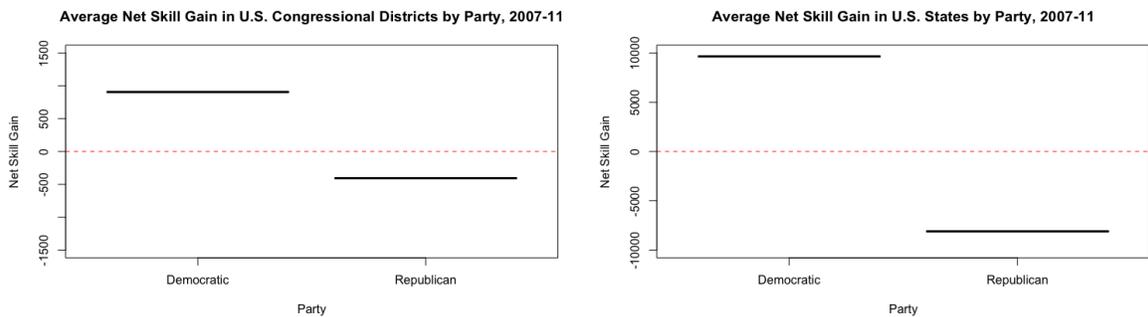


Figure 6: *Average Net Skill Gain From Internal Migration (by Party)*

Democratic (Republican) constituencies have gained (lost) skilled workers through internal migration.

The American case is therefore consistent with the lemmas of the model. As educated citizens sort into high-density constituencies, Democratic constituencies become relatively more skilled.

Cross-National Evidence of Shifting Skill Levels of Partisan Constituencies

I now extend my analysis of partisan constituencies by examining data from Australia, Canada and the United Kingdom.

Implication 1. *A majority of Left (Right) Constituencies are High-Density (Low-Density)*

For Australia, Canada and the United Kingdom, I divide constituencies by population density into a top half (“high-density”) and a bottom half (“low-density”) in each of the country years in my sample.⁵³ In every year for which I have data, a majority of each country’s major Left party constituencies are high-density, and a majority of each country’s major Right party constituencies are low-density (see Figure 7 below).⁵⁴

Percentage of Constituencies That Are High-Density

	Australia 2011	Australia 2013	Australia 2016	Canada 2001	Canada 2006	Canada 2011	Canada 2016	U.K. 2001	U.K. 2011
Left	61	67	64	59	67	73	65	63	75
Right	41	40	39	29	33	37	22	25	31

Figure 7: *Percentage of Left and Right Constituencies that are High-Density*

Implication 2. *High-Density Constituencies Become Disproportionately Skilled Over Time*

I now test whether high-density constituencies have become disproportionately skilled over time. As before, I divide constituencies into a high-density top half and low-density bottom half. I again calculate the “Skill Gap” measure between high-density constituencies and low-density

⁵³For 2001 and 2011, I calculate the percentage of Labour seats in the House of Commons that are in high-density parliamentary constituencies, and do the same for the Conservative party. Because of data limitations, I am only able to do this analysis for England and Wales (which include almost 90 percent of constituencies in the U.K.). I also perform this analysis for the Canadian House of Commons elected in 2011 and 2016 (the Liberal Party is the Left party, and the Conservative Party is the Right party), and the Australian House of Representatives in 2011, 2013 and 2016 (Labor is Left and the Liberal and National parties are coded as Right—by 2011, the Liberal and National parties had merged in the Australia state of Queensland and in the Northern Territories, and the parties have long collaborated on strategy and policy positioning).

⁵⁴I cannot analyze the Canadian Senate because Senators are appointed by the Prime Minister; for the same reason, I cannot examine the British House of Lords. Australian Senators are elected via state-wide proportional representation, and are therefore not within the scope of my theory.

constituencies.⁵⁵ I examine the trend in this variable over time (including institution fixed effects), and examine both the average and median differences in skill between high-density and low-density constituencies. In Table 1, I show statistically significant positive time trends for both measures of the “Skill Gap.”

Table 1: Skill Gap Between High and Low-Density Constituencies

	<i>Dependent variable:</i>	
	Median Skill Gap	Mean Skill Gap
	(1)	(2)
Year	0.173** (0.078)	0.188** (0.073)
Institution FE	✓	✓
Constant	-338.120** (156.862)	-368.041** (146.945)
Observations	24	24
R ²	0.692	0.698
Adjusted R ²	0.606	0.614
Residual Std. Error (df = 18)	2.693	2.523
F Statistic (df = 5; 18)	8.072***	8.327***

Note:

*p<0.1; **p<0.05; ***p<0.01

⁵⁵I conduct this analysis for the Australian House of Representatives, the Canadian House of Commons, the U.K. House of Commons, the U.S. House of Representatives, and the U.S. Senate.

Implication 3. *The Relative Skill of Right Constituencies Declines Over Time*

Finally, I perform a quantitative test of whether Left constituencies have become relatively more skilled over time.⁵⁶ I measure the “Relative Skill of Right Constituencies,” which is the difference between the skill level of the median (or mean) constituency controlled by the Right and the skill level of the median (or mean) constituency controlled by the Left. I expect this variable to trend in a negative direction over time as high-density Left constituencies become disproportionately skilled due to internal migration. Table 2 confirms that the Relative Skill of Right Constituencies has declined (i.e. exhibits a negative and significant time trend). Having found support for the lemmas of the model, I now turn to testing the propositions.

Table 2: Relative Skill of Right Constituencies

	<i>Dependent variable:</i>	
	Median Relative Skill of the Right	Mean Relative Skill of the Right
	(1)	(2)
Year	-0.259*** (0.054)	-0.231*** (0.041)
Institution FE	✓	✓
Constant	520.261*** (108.458)	464.435*** (82.564)
Observations	30	30
R ²	0.733	0.788
Adjusted R ²	0.678	0.744
Residual Std. Error (df = 24)	2.155	1.641
F Statistic (df = 5; 24)	13.192***	17.872***

Note:

*p<0.1; **p<0.05; ***p<0.01

Evidence of Partisan Realalignments on Trade

I conclude my empirical analysis by examining whether there is evidence of partisan realignments on trade and voter realignments by skill level in Australia, Canada, the United Kingdom and the

⁵⁶As before, I conduct this analysis for the Australian House of Representatives, the Canadian House of Commons, the U.K. House of Commons, the U.S. House of Representatives, and the U.S. Senate.

United States between 1985 and 2015.⁵⁷

I measure parties' support for tariffs in a given election year by taking a Manifesto Project measure of favorable mentions of protectionism in a party's platform and subtracting from it a measure of unfavorable mentions of protectionism.⁵⁸ To assess whether there is evidence of an emerging partisan realignment on trade, I measure the "Relative Protectionism of the Right" in each country-election year by subtracting the major Left party's "Support for Tariffs" value from the major Right party's value (i.e. for the United States in 1988, the "Relative Protectionism" measure captures the Republicans' 1988 "Support for Tariffs" score minus the Democrats' 1988 "Support for Tariffs" value).

Table 3 displays a statistically significant positive time trend in the Relative Protectionism of the Right. Figure 8 shows most Relative Protectionism measures were negative in the 1980's, indicating relatively pro-trade Right parties; in the 2000's, most values are positive, indicating partisan realignments on trade. I therefore demonstrate that Right parties in advanced plurality countries have become relatively more protectionist over the last three decades, as predicted by the model. One empirical concern might be that only Left or Right parties are driving this result. Disaggregating Left and Right party positioning, I find that the increased relative protectionism of the Right is driven by both increasingly liberal positioning by the Left and more protectionist positioning by the Right (shown in the appendix). Furthermore, I "placebo test" my theory in the appendix by showing that Right parties have not become more protectionist in advanced proportional representation countries.

⁵⁷The Right parties in my sample include the Republican party in the U.S., the Conservative party in the U.K., the Progressive Conservative party in Canada from 1984 to 2000 and the Conservative party in Canada from 2004 to 2011, and the Liberal party in Australia. Though there are two major Right parties in Australia, the Liberal party and the National party, I can only include one Right party in each country-election year. While the Liberal party and National party are often in a coalition government together, the Liberal party is generally the dominant partner and the larger party. It is not consequential whether one analyzes the Liberal party platform or the National party platform, as the parties "run on a common ideological platform" (Rodden (2019), page 213). The Left parties in the sample are the Democratic party in the U.S., Labour in the U.K., the Liberal party in Canada, and Labor in Australia.

⁵⁸This is "per406"- "per407."

Table 3: Relative Protectionism of the Right, 1985-2015

<i>Dependent variable:</i>	
Relative Protectionism of the Right	
Year	0.106** (0.040)
Country FE	✓
Constant	-210.868** (79.000)
Observations	33
R ²	0.276
Adjusted R ²	0.172
Residual Std. Error	1.901 (df = 28)
F Statistic	2.662* (df = 4; 28)

Note: *p<0.1; **p<0.05; ***p<0.01

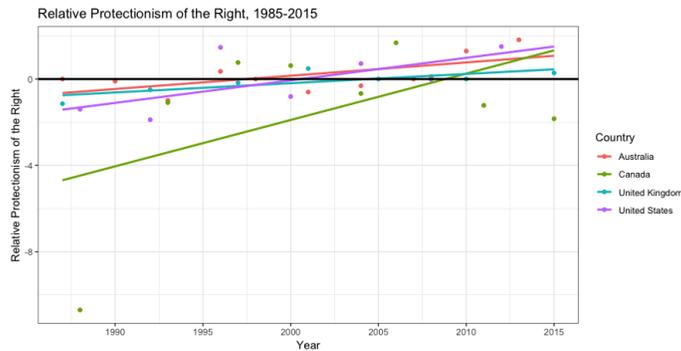


Figure 8: *Relative Protectionism of the Right*

This plot reveals that the Relative Protectionism of Right parties has increased over time.

In the appendix, I demonstrate evidence for the theorized mechanism in the U.S. case. Using automated text analysis, I demonstrate that incumbents increased their support for trade after their constituencies became more skilled from internal migration. Furthermore, I draw on data from [Milner and Tingley \(2011\)](#) to show that incumbent legislators are more likely to vote in favor of trade agreements if their constituencies have become more skilled.

Evidence of Voter Realignment by Skill Level

Finally, I assess whether the emerging realignment on tariff positions has been accompanied by a corresponding “voter realignment” by skill level. To analyze trends in voting by skill level, I rely on post-electoral survey data. I divide each country’s sample into voters with university education and above (“skilled”) and those without (“unskilled”), and calculate the percentage of each voter type that supported the major Left (Right) candidate in their constituency’s legislative election (I exclude survey respondents who did not vote).⁵⁹ I first calculate the “Skill Gap in Voting,” which is the percentage of college-educated voters supporting a party minus the percentage of uneducated voters turning out for the party. Positive (negative) values indicate a party is more popular with college-educated (uneducated) voters. I then subtract the major Left party’s value of this measure from the Right’s “Skill Gap in Voting” to generate the “Relative Skill of Right Voters.” This measure is positive if the Right’s electorate is more college-educated than that of the Left, and negative if the Left’s base of support is relatively more educated. I examine the time trend for this measure in Table 4, finding a negative and significant time trend in the “Relative Skill of Right Voters” that corresponds with the previously discussed “Relative Protectionism of the Right.” Figure 9 presents visual evidence that voter realignments by skill level have accompanied the emerging partisan realignments on trade in advanced plurality countries.

⁵⁹To measure voter behavior, I utilize the American National Election Study, as well as the Australian, Canadian and British Election Studies. In the U.S., I assess voting for members of the House.

Table 4: Partisan Voting by Skill Level

<i>Dependent variable:</i>	
Relative Skill of Right Voters	
Year	-0.608*** (0.134)
Country FE	✓
Constant	1,216.732*** (268.679)
Observations	32
R ²	0.672
Adjusted R ²	0.623
Residual Std. Error	6.447 (df = 27)
F Statistic	13.812*** (df = 4; 27)

Note: *p<0.1; **p<0.05; ***p<0.01

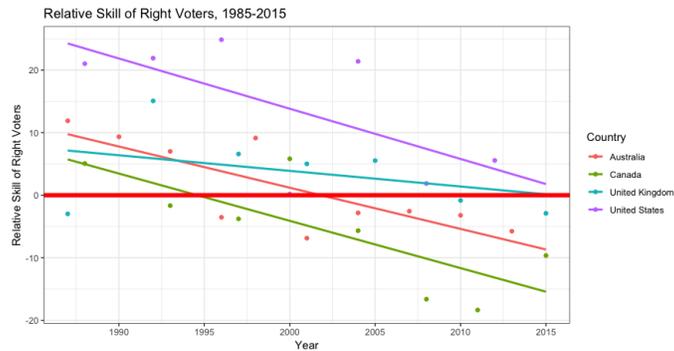


Figure 9: *Relative Skill of Right Voters*

This figure shows that the Relative Skill of Right Voters has decreased over time.

I therefore find empirical support for all predictions of my model; as the relative skill of Right constituencies declines, the relative protectionism of Right parties rises. The emergence of an increasingly protectionist Right induces a decline in the relative skill of Right voters.

Conclusion

Over the last three decades, two puzzling realignments have taken place in advanced plurality countries. Initially protectionist Left parties have become proponents of free trade, while formerly pro-trade Right parties now endorse protectionism. At the same time, the Right has lost its appeal among educated citizens; the Left has gained these voters at the expense of losing support among the unskilled. In this paper, I offer a formal theoretical framework for understanding these developments. Drawing on research in economic and political geography, I argue that exposure to trade causes skilled workers to move from low-density constituencies controlled by Right incumbents to high-density constituencies controlled by the Left. As the relative skill of Right constituencies decreases, the relative protectionism of the Right rises, yielding a corresponding decline in the relative skill of Right voters.

My research provides new causes for concern for already-embattled proponents of globalization in advanced countries. [Rodden \(2019\)](#) shows that advanced plurality systems are biased against urban citizens; as skilled workers sort into cities, the political power of globalization supporters will continue to wane, dimming the prospects for continued global economic integration. Ultimately, my findings show the importance of economic geography not only for domestic electoral politics, but also for the international political economy. Future studies should further probe the political consequences of an ever-evolving spatial economy.

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