

A Regional Analysis of Incumbency and Female Presidential Candidates

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How and when do women win presidential elections? This book develops a theory centered on incumbent parties as a pathway for women to achieve this. Women have won the presidency in Latin American nine times, and in seven of these instances, women were backed by an incumbent party or running for re-election themselves. This chapter empirically probes the incumbent pathway theory by analyzing two stages of the presidential selection process: (1) the party nomination stage; and (2) the general election.

My main argument concerning the nomination stage is that vote-seeking parties are more likely to support female presidential candidates when the parties' perceived weaknesses align with women's stereotypical advantages: novelty, feminine leadership, and moral integrity. The theory next reveals unexpected affinities between parties currently holding presidential power—henceforth “incumbent parties”—and female presidential candidates. Such parties can be more likely than challenger parties to perceive a need to credibly signal these traits. As a result, incumbent parties may be more likely than challenger parties to nominate women for president.

Concerning the general election stage, the incumbent pathway theory emphasizes the relevance of these kinds of parties in boosting women's electoral performance. Incumbent parties usually provide their presidential nominees with substantial resources to launch viable and sometimes victorious campaigns. Due to gender stereotypes, women with presidential ambitions need to signal experience in order to reassure voters of their capacity to govern. As a result, the formal support of incumbent parties may especially benefit women's performances in presidential races, the second and final stage of the presidential selection process.

I empirically explore some of the theory's main predictions by employing data on all presidential candidates in 18 Latin American countries during the 1990-2019 period. My dataset builds on Baker and Greene's (2011) presidential candidate dataset of over 750 candidates that competed in 101 elections from 1990–2014 in 18 Latin American countries. I extended the dataset through 2020 and coded the sex of all candidates and their parties' incumbency status. I also use AmericasBarometer data to analyze the contextual factors that can motivate parties to nominate women.ⁱ

Results from regression models are consistent with each of these theoretical expectations, but only during Latin America's post-2004 period. Parties overall are more likely to back women over men (1) when citizens tend to identify with political parties less; (2) when citizens trust parties less; and (3) when citizens perceive greater corruption. Parties' incumbency status exerts a significant and positive impact on the likelihood of nominating a female presidential candidate. The models' null results concerning parties' ideology is consistent with existing work on legislative nominations (Funk, Hinojosa, and Piscopo Forthcoming). In short, contextual factors as well as whether parties currently hold presidential power appear to affect parties' decisions to break with tradition and nominate women for president.

The chapter next turns to the second stage and uses three measures of electoral performances: vote share, viability and victory. Viability includes vote share as a criterion, but it also adds in candidates' first-round placements (Reyes-Housholder and Thomas 2021). The data indeed show that incumbency status boosts both men's and women's electoral prospects, but the differential impact of incumbency on male and female candidates' electoral results appear null in contingency tables.

These null results hardly indicate gender-neutral processes, and more likely reflect a brief historical record. Victorious men have successfully leveraged a plethora of alternative, non-incumbency routes to winning presidential elections. Men backed by challenger parties have won the presidency 58 times, but women have done the same just twice. The support of experienced, specifically incumbent parties seems to determine much of the success of female presidential candidates in Latin America.

This chapter then critically examines an alternative pathway to the presidency: family ties (Jalalzai 2016; 2013). I point out that it has been more common in Latin American since 2004 for women to win presidential elections without direct family ties to the presidency. Moreover, many of the spouses of former presidents also achieved viability by consolidating the support of an incumbent party, and this suggests that incumbent parties rather than merely family ties provide a broader more generalizable path to the presidency. The incumbent pathway theory ultimately provides greater explanatory power concerning how women win presidential elections.

To sum up, this regional analysis suggests that incumbent parties can play a crucial role in women's presidential victories. Rather than a large-N statistical analysis, the rest of the chapters adopt an in-depth qualitative approach, which not only enables a deeper understanding of the context of specific presidential cycles, but it also enables an appreciation of female presidential candidates' agency, specifically their use of gendered discourse to obtain power, an objective that is difficult to achieve with large-N statistical analysis. Chapters 4 and 5 seek to understand why two "most different" incumbent parties—the Concertación and the Asociación Nacional Republicana—decided to break with tradition and throw their campaign resources Michelle Bachelet in 2005 and Blanca Ovelar in 2007. Chapter 6 explores the gendered factors that seemed to boost Michelle Bachelet to victory and impeded Blanca Ovelar's ultimate success. This chapter argues that Bachelet's ability to project autonomy from the men in her coalition and Ovelar's inability to achieve helps explain how Bachelet won and Ovelar lost in the general election.

1. Stage One: Context, Incumbency, and Female Presidential Nominees

1.1 Hypotheses

It is possible to compete for the Latin American presidency as an independent, but no candidate at least since 1990 has ever won a presidential election without the support of a political party. The first stage of the presidential selection process therefore is obtaining the formal nomination of at least one party or coalition. When do women achieve this?

Chapter 2 explained how because of their historical marginalization, women in politics are better positioned to credibly signal change and novelty. In addition to their outsider status, connections between the female sex and maternalism mean that women in politics are also associated with greater moral integrity than their male counterparts.

The theory suggests that contextual factors could motivate parties to break with tradition and support female candidates. Specifically, when citizens identify with and trust parties less, parties are more likely to calculate that they need to switch course and convey novelty. Parties in

such contexts therefore are more likely to nominate women. Parties' variable incentives to convey novelty and change lead to two contextual hypotheses:

H_{partyid} : Parties are more likely to nominate female presidential candidates when citizens identify less with parties.

$H_{\text{trustparties}}$: Parties are more likely to nominate female presidential candidates when citizens trust parties less.

Due to the prevalent belief that women in politics are less corrupt than men, parties are more likely to turn to women when they seek to portray—or as more often is the case for incumbent parties—re-brand themselves as anti-corruption forces. The degree to which parties will seek to convey moral integrity will likely depend on citizens' perceptions of corruption. When citizens perceive little corruption, parties are less likely to prioritize a need to project moral leadership via their presidential candidates' sex and hence even more likely to stick with men. However, when citizens perceive greater corruption, parties are more likely to do so, and hence more likely to gamble on women.

$H_{\text{corruption}}$: As citizens' perceptions of corruption rise, parties are more likely to nominate female presidential candidates.

All of the above further suggests that parties' incumbency status should matter. Given their experience holding presidential power, incumbent parties' weaknesses may align more closely with women's stereotypical advantages than the weaknesses of non-incumbent parties. To justify their continued grip on presidential power, incumbent parties would be more likely than challenger ones to perceive a need to signal change and novelty. Moreover, because incumbent parties have had greater opportunities for corruption, they may be more likely than challenger parties to perceive a need to signal moral integrity. Conversely, challenger parties are more likely to seek to project capacity to govern and have less of a need to credibly signal change and novelty. These parties consequently may cling to male contenders even more than incumbent parties.

$H_{\text{incumbent}}$: Incumbent parties are more likely to than challenger parties to nominate female presidential candidates.

1.2 Operationalizations

These contextual hypotheses—party identification, trust in parties, and corruption—require survey data from the Latin American Public Opinion Project (LAPOP), which only covers the post-2004 period. Following Funk, Hinojosa, and Piscopo (2019), I match as closely as possible the LAPOP data to the time period during which parties select their candidates. I therefore used survey data that was collected prior to the presidential elections by a period of several months, but when that was not possible, I used data collected during periods that immediately proceeded the elections. I did not use the data if the survey fieldwork was conducted more than eight months after the first round of voting. For example, the 2006 Brazilian elections occurred in October, and I used the LAPOP 2006-07 data, which were

collected in June and July of 2007. (See Table 2A for the complete list of presidential election dates and LAPOP fieldwork dates).

First, the variable *party identification* is measured with the survey question “Do you currently identify with a political party?” *Party identification* features the percentage of “yes” responses to this question. Second, *trust in parties* is measured with the survey question “To what extent do you trust the political parties?” Respondents were shown a ladder with steps numbered 1 to 7, where 1 was the lowest step and means “not at all” and 7 is the highest and means “a lot.” *Trust in parties* is the average of the responses. Finally, citizens’ perceptions of corruption are measured with the survey question “Taking into account your own experience or what you have heard, corruption among public officials is very common, common, uncommon, or very uncommon?” *Citizen corruption perceptions* reflects the percentage of respondents who responded “very common” to this question.

Citizens’ assessments of the level of corruption in their own countries could depart from experts’ more objective and broad-based assessments of corruption. These differences also could create contrasting impacts on parties’ tendencies to nominate women for president. Some studies suggest that male-dominated networks of corruption tend to shut out women from executive politics, specifically ministerial posts (Stockemer and Sundström 2019). Parties operating in contexts of deeply ingrained corruption may seek male contenders because networks of corruption are based on trust, and party leaders hence trust insiders (men) more than outsiders (women). If this is true, then actual—rather than perceived—levels of corruption could negatively affect the likelihood of parties nominating female presidential candidates.

To account for this possibility, models control for experts’ assessments of levels of corruption in the executive branch. Data for this control variable come from the Varieties in Democracy dataset (Coppedge et al. 2016). Country experts assessed corruption at the executive level on a 0-100 scale according to these questions: “How routinely do members of the executive, or their agents grant favors in exchange for bribes, kickbacks, or other material inducements, and how often do they steal, embezzle, or misappropriate public funds or other state resources for personal or family use?”

Unlike the contextual hypotheses, the incumbent hypothesis can be tested on the full dataset (1990-2019). Candidates are coded as incumbents if they are supported by the current presidential party in power. Some constitutions in Latin America impose restrictions on presidents’ ability to run for a consecutive term, so presidential candidates coded as incumbents can also be candidates who are not currently the president, but rather are backed by the same party that supports the outgoing president. Such candidates reap the benefits of being able to signal experience and they are able to leverage the incumbent party’s campaign resources.

Former presidents who sat out a term and then competed again are not counted as incumbents because they are not supported by the outgoing presidential party power, but rather as being nominated by challenger parties. Tabaré Vázquez in 2014, however, is coded as an incumbent because he ran with the support of the Frente Amplio coalition, which supported José Mujica’s 2010-15 presidency. Table 1A lists all former presidents who ran for a non-consecutive (rather than consecutive) term. The only female to have done so is Michelle Bachelet in the 2013

Chilean race. All of the results concerning the role of incumbency are robust to coding former presidents who ran for non-consecutive terms as incumbents.

The theory posits that incumbent parties would nominate women due to the alignment between their perceived goals and women's stereotypical advantages. An alternative explanation for why incumbent parties would nominate women more than non-incumbent parties relates to the region's ideological context in the post-2004 period. This period overlaps with much of the region's "pink tide" era, often thought to extend from 1999 to 2016 (Levitsky and Roberts 2011). Although the overlap is imperfect, it could be that incumbent parties in the post-2004 era chose female presidential candidates because they leaned further to the left than their male counterparts.

All models control for *ideology* to account for the possibility that left-leaning parties may tend to nominate more women than conservative parties. The parties' ideologies in this dataset are coded on a 1-20 scale, with lower scores indicating greater ideological progressivism and higher scores indicating greater ideological conservatism (Baker and Greene 2011).

Models also control for the percent female in Congress (Thames and Williams 2013; O'Brien and Reyes-Housholder 2020; Jalalzai 2013). All models include year fixed effects, and Models 4 and 5 included country fixed effects. Including the country dummies and the *party identification* and *trust in parties* variables introduces collinearity and drops observations from the countries with no female presidential candidates during this period: El Salvador, Nicaragua, and Uruguay. This reduces information and hence precision of the estimates of parties' selection of male candidates, and the *party identification* and *trust in parties* results are not robust to the inclusion of country fixed effects. Table 3A lists the descriptive statistics for all of these variables.

1.2 When are parties more likely to nominate women for president?

Logistical regression analysis enables estimation of the impact of contextual factors and incumbency on parties' likelihoods of nominating a female presidential candidate. The reduced number of relevant observations limits possibilities for robust statistical analysis of whether these same contextual factors work in different ways according to the incumbency status of the political party. I therefore leverage contingency tables to examine possible differences.

Table 1 displays the results concerning the impact of contextual factors and incumbency on parties' likelihoods of nominating female presidential candidates during the post-2004 period. Model 1 shows that *party identification* exerts a significant and negative impact on parties' likelihoods of supporting female candidates. This result is consistent with theoretical expectations: as citizens identify less with parties, parties are more likely to throw their support behind women.

Table 1: Context, Incumbency and Candidate Sex 2004-19

	Model 1	Model 2	Model 3	Model 4	Model 5
Party identification	-0.06	--	--	--	--
	(0.02)***	--	--	--	--
Trust in parties	--	-0.98	--	--	--
	--	(0.45)**	--	--	--
Citizens' corruption perceptions	--	--	0.06	0.19	--
	--	--	(0.03)**	(0.03)**	--
Incumbent	0.82	0.73	0.98	1.23	0.96
	(0.42)*	(0.41)*	(0.44)**	(0.45)**	(0.44)**
Expert: executive corruption	--	--	-0.02	-0.05	--
	--	--	(-0.01)**	(0.07)	--
Party ideology	-0.04	-0.03	-0.04	-0.05	-0.04
	(0.3)	(0.03)	(0.04)	(0.04)	(0.03)
Percent female in legislatures	-0.01	-0.01	-0.03	-0.13	-0.07
	(0.02)	(0.02)	(0.02)*	(0.11)	(0.07)
N	381	405	345	299	361

Notes: All models include year fixed effects, which means that the year 2004 drops out of the analysis as no women for president in 2004. Results are robust to excluding the year fixed effects and hence including the year 2004. Models 4 and 5 include country fixed effects, which automatically forces El Salvador, Nicaragua, and Uruguay to drop out since no women ran for president in these countries during the post-2004 period. All results are robust to including the number of candidates in a particular race as well as national rates of unemployment, inflation, and GDP growth. Results are also robust to excluding candidates with less than 1% of the first-round vote.

* $p < 0.10$; ** $p < 0.05$; *** $p < 0.01$

Parties' incumbency status exerts a significant and positive impact in Model 1, as it does in all the other models. These results are consistent with my theory's central prediction concerning the theoretical confluence of these parties' weaknesses and women's stereotypical strengths. However, the significant results regarding parties' incumbency status are not robust to the inclusion of pre-2004 data (results not shown), a point that I explore further at the end of this section.

Model 2 shows that *trust in parties* is also significant and negative, and this again is consistent with theoretical expectations: as citizens trust parties less, parties overall are more likely to change course and nominate a woman. Models 3 and 4 illuminate a potential impact of citizens' perceptions of corruption. Both models show significant and positive effects: as citizens perceive greater levels of corruption, parties become more likely to nominate female over male contenders for president. Model 3 further shows that the likelihood of nominating a female presidential candidate decreases as experts' assessments of corruption in the executive branch increases.

Model 4 introduces country fixed effects, which forces countries where either no party during the post-2004 period nominated a woman for president countries or where there are no data on corruption perceptions to drop out of the analysis: Nicaragua, the Dominican Republic,

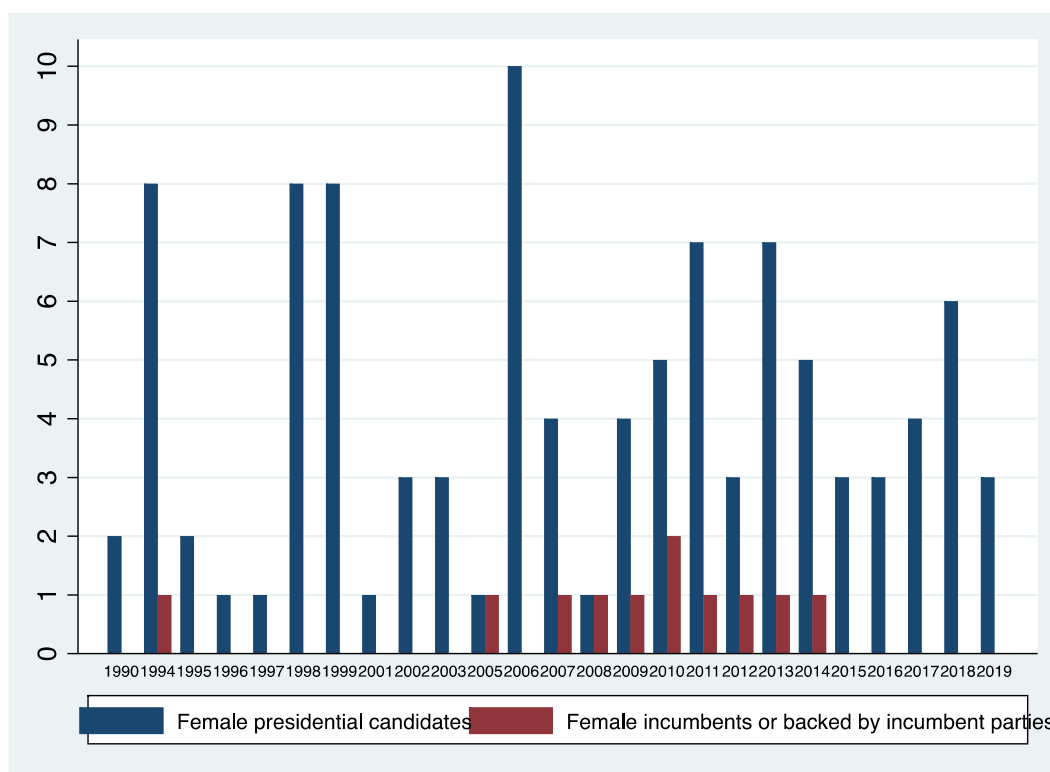
Venezuela, El Salvador, and Uruguay.ⁱⁱ The inclusion of the country dummies in Model 4 means that the executive corruption variable loses significance. This is possibly related to greater multicollinearity produced by the country dummies. Model 5 replicates the positive results for parties' incumbency status but again introduces country fixed effects.

The control variables collectively seem to exert little influence on parties' tendencies to nominate women for president. Null results for *ideology* are consistent with existing work on the region's left turn and candidates' sex at the legislative level (Funk, Hinojosa, and Piscopo Forthcoming; Forthcomingb). This work argues that parties' strategic motivations rather than ideological factors are more determinant of parties' tendencies to nominate female legislative candidates. The quantity of women in Congress does not consistently affect the likelihood of parties to nominate women for president. This variable is only significant in Model 3 and the coefficient is negative. Parties' motivations appear more determinant than "supply" factors (Inglehart and Norris 2003).

All of the results reported in Table 1 are robust to macroeconomic indicators, specifically annual gross domestic product growth, unemployment rates, and percentage change in inflation ("International Monetary Fund Data" 2017). None of the coefficients for these variables appeared significant in any of these robustness checks, suggesting that objective measures of macroeconomic performance do not correlate with parties' overall tendencies to nominate women for president (Inglehart and Norris 2003). I therefore find no evidence that economic crisis or economic good times independently exert impacts on parties' nominations of female presidential candidates.

The positive relationship between incumbent parties and female presidential nominees may only apply to the post-2004 era. Figure 1 shows the number of female presidential candidates from 1990-2019 and the number of women who ran with the backing of an incumbent party. Mireya Moscoso first ran for president backed by the incumbent Partido Arnulfista in 1994, and then the next Latin American woman to run backed by an incumbent party was Michelle Bachelet in 2005. From 1990-2005 35 women backed by challenger parties, including victors Violeta Chamorro and Mireya Moscoso, ran for president.

Figure 1: Female Presidential Candidates and Incumbency 1990-2019



Again, due to the limited number of observations, the data do not permit a regression analysis of the contextual factors that could specifically motivate incumbent parties to break with tradition and nominate a woman. While they do not control for potential confounders, contingency tables still can shine some light on whether citizens' levels of party identification, trust in parties, and perceptions of corruption could provide incentives for incumbent parties to throw their support behind a woman.

Table 2 shows party identification levels when incumbent parties supported female candidates averages to 31.81 while party identification levels when such parties nominated male candidates averages to 35.48. This difference, however, is not statistically significant ($p=0.48$). This result of non-significance could trace back to a lack of statistical power. Among non-incumbent parties showed, similar differences are also observed, and these differences are statistically significant ($p=0.002$). Put differently, the differences in party identification levels when incumbent parties nominate male vs. female candidates contribute to the overall positive and significant impact observed in the regression model results.

Table 2: Incumbency, Contextual Factors and Candidate Sex 2004-19

	Party Identification	
	Women	Men
Incumbent	31.81 (N=10)	35.48 (N=42)
Challenger	26.83 (N=49)**	33.03 (N=340)**
	Trust in Parties	
Incumbent	2.98 (N=10)	2.97 (N=48)
Challenger	2.80 (N=50)*	2.92 (N=370)*
	Citizens' Corruption Perceptions	
Incumbent	43.13 (N=9)	45.27 (N=41)
Challenger	49.25 (N=43)	46.73 (N=318)
	Expert Assessments of Public Corruption	
Incumbent	32.3 (N=10)**	51.62 (N=42)**
Challenger	50.45 (N=49)	47.80 (N=370)
	Expert Assessments of Executive Corruption	
Incumbent	43.3 (N=10)	55.29 (N=42)
Challenger	54.02 (N=49)	51.36 (N=370)
	Party Ideology	
Incumbent	10.99 (N=10)	11.47 (N=46)
Challenger	10.17 (N=42)	11.06 (N=319)

Note: Mean levels of dependent variables shown.

Candidate sex differences: * $p < 0.10$; ** $p < 0.05$

Moving down the contingency table, the difference between average levels of trust in parties when incumbent parties nominate female and male candidates is virtually zero (0.01% difference). However, levels of trust in parties when challenger parties nominate women averages to 2.80, appearing significantly lower than 2.92, the mean trust in parties when challenger parties nominate men ($p=0.06$). This suggests that the *trust parties* results detected in Model 3 in Table 3 might be driven mostly by challenger rather than incumbent parties.

The results of citizens' corruption perceptions and incumbent vs. challenger are mixed, but not inconsistent with the theory of gendered advantages. Citizens' perceptions of corruption appear lower when incumbent parties nominate women (43.13) than when they nominate men (45.27), but they are higher when non-incumbent parties nominate women (49.25) than when they nominate men (46.73). None of the sex differences are significant.

Results from Models 3 and 4 in Table 1 suggest that a chief confounder to this relationship between citizens' perceptions of corruption and parties' likelihoods of supporting women could be a perhaps more objective indicator of corruption: expert assessments of executive-level corruption. Experts' assessments of executive corruption are lower when

incumbent parties nominate women (43.3) than when they nominate men (55.29), but this difference is not significant ($p=0.18$). This difference for incumbent parties is reversed and not significant.

Experts' assessments of public corruption are lower when incumbent parties nominate women (32.3) than when incumbent parties nominate men (51.62), and these differences are statistically significant ($p=0.02$). (Logistic regression model results for public corruption not shown but are similar to results for executive corruption as the correlation between executive-level and public corruption is $p=0.86$.)

Finally, female candidates, at first blush, appear to lean slightly more to the left than their male counterparts from 2004-19. The ideological mean for incumbent candidates is 10.99 for women and 11.47 for men. Moreover, the mean for challenger candidates is 10.17 for women and 11.06 for men. However, these sex differences fail to reach statistical significance. Moreover, during this period, non-incumbents tended to lean more to the left than non-incumbent. These data overall are not consistent with the idea that incumbent parties tend to nominate more women than challenger parties because both female candidates are ideologically more progressive than their male counterparts.

2. Stage Two: Electoral Performance, Incumbency, and Candidate Sex

2.1 Defining Gradations of Electoral Performance

Having probed when parties nominate women, I now turn to the second stage of the presidential selection process: candidates' performances on voting day. Most electoral systems in Latin America feature a two-round electoral system in which only the top two contenders advance to the second round (Negretto 2006). This chapter analyses three measures of electoral performance: the percentage of first-round vote share (a continuous variable), whether they attained viability and whether they ultimately won the election (both binary variables). While vote share and ultimate victory are easily measured, the operationalization of viability requires a more extensive discussion.ⁱⁱⁱ

I operationalize viability according to two criteria based on first-round outcomes. First, the candidate must have finished in at least third place. Fourth-place finishers rarely, if ever, pose a real threat to the ultimate winner of a presidential election. Candidates who finished in first place in the initial round of voting do not always end up winning the election,^{iv} but I automatically consider them as viable candidates regardless of their vote share.

An additional criterion applies to candidates who finished second or third: they must also have obtained at least 15% of the vote to be classified as viable. No candidates since 1990 have finished in second place and failed to meet the 15% threshold, but some third-place finishers in systems dominated by two parties or coalitions—for example Gladys Marín in Chile in 1999 who received just 3.2% of the vote—are never considered close contenders for president. Similarly, Elías Wessin ended up in third place in the 2012 race in the Dominican Republic, but only garnered 0.44% of the vote. Like Marín, he never posed a serious threat to the top two contenders.

This definition of viability is retrospective, thereby omitting candidates who looked like serious contenders months or weeks before election day, but who then fell short once the votes were cast and counted. Irene Sáez's presidential run indeed illustrates this. Sáez, a successful mayor and former Miss Universe, topped the polls for the 1998 presidential race when she entered the race, but she ultimately finished third with only 3% of the first round vote (Hinojosa 2010). Examples of female candidates peaking before election day and then dramatically tumbling nevertheless are uncommon.

Sáez's bid seems to constitute a partial counter-example to this book's argument of the electoral importance of parties with governing experience. Indeed, against the backdrop of historically dominant but also discredited two-party system, Sáez seemed more popular among Venezuelans when she was running as a candidate of her own IRENE party rather than as the candidate of an experienced party. The Social Christian Party (COPEI) was one of the two dominant parties in the Venezuelan system since 1958. Despite their historical success, COPEI's decision to back Sáez actually preceded the tumbling of her citizen-level support.^v Hugo Chávez ended up winning that election, marking the beginning of Latin America's left turn. He remained in power for the next 14 years, until his death in 2013, and no female candidate has ever mounted a viable campaign in Venezuela.

Despite these limitations, operationalizing viability in terms of first round performance enables exploration of how important incumbency appears to both male and female candidates in terms of assuring their viability during the 1990-2019 period.

2.2 Do incumbency and candidate sex affect electoral performance? If so, how much?

Chapter 2 reviewed the literature on incumbents' electoral advantages over challengers. I test this conventional wisdom, based primarily on legislative elections in the U.S., on the 1990-2019 dataset of presidential candidates in Latin America. I simultaneously estimated possible impacts of candidates' sex on electoral performance. Incumbent party status in this dataset is operationalized as whether the current president's party supports the candidate who may or may not be the sitting president.

I regress incumbency status and candidate sex on the dependent variables of vote share, viability and victory. The vote share models use OLS regression because vote share is a continuous variable and the viability and winner models use logit as viability is a binary variable. I also control for the number of candidates, and all models include year and country fixed effects. Models include a variable for ideology at the party level. The dataset has ideological information for 787 presidential candidates during the post-1990 period.

Table 3 shows the impacts of parties' incumbency status and candidates' sex three measures of electoral performance. Incumbent status exerts a significant and positive effect on a candidates' vote share, but candidate sex and ideology are not significant. The control variable of number of candidates has a significant and negative impact on vote share.

The results of the viability model are similar. Incumbency again exerts a significant and positive effect on a candidate's likelihood of mounting a viable presidential campaign. Neither candidate sex nor ideology exert significant effects, but the number of candidates again significantly depresses the likelihood of a particular candidate achieving viability. All of these results are robust to the inclusion of macroeconomic indicators—specifically unemployment

rates, inflation, and GDP growth—which existing theory also suggests could mitigate the positive impact of incumbency on electoral performance (Carlin and Singh 2015).

Table 3: The Impacts of Incumbency and Candidates' Sex on Electoral Performance 1990-2019

	Vote Share	Viability	Victory
Incumbent	0.25	3.18	2.32
	(0.02)***	(0.36)***	(0.25)***
Candidate Sex	-0.004	0.09	-0.41
	(0.02)	(0.30)	(0.43)
Ideology	0.02	0.05	0.02
	(0.001)*	(0.02)***	(0.03)
Number of candidates	-0.01	-0.15	-0.07
	(0.002)***	(0.04)***	(0.05)
N	788	787	787

*Note: All models include year and country fixed effects.

Only 11 women ran for president with the incumbent parties' support since 1990. This relatively small number does not enable a robust regression analysis of whether incumbency status provides a disproportionately larger boost to female than male candidates. Such an analysis would require an interaction term between incumbency status and candidate sex.

The historical record, however, does suggest that incumbency party status would matter more for women's presidential ambitions. Women have won the presidency with incumbent parties six times and without incumbent parties just three times. However, in two of the non-incumbent cases women still won with the support of a well-resourced and experienced party. Moscoso won with the Pañameñista party, one of the oldest and strongest parties in Panama, and Bachelet, a former president herself, won re-election in 2013 after sitting out a constitutionally-mandated term.

It is only in the case of Violeta Chamorro's 1990 victory that a woman won without the support of a well-established party. Chamorro unified the National Opposition Union coalition of 14 parties to defeat the incumbent Daniel Ortega. She thereby became Latin America's first elected female president (see the final section for more discussion of Violeta Chamorro).

Men, on the other hand, have won the presidency as challengers 58 times during this same timeframe. This suggests that while men's electoral prospects undoubtedly benefit from incumbency status, incumbency may not be as determinant of men's chances of victory as women's chances.

Although the statistical data during up until 2019 remain inconclusive on this point, men have often leveraged their non-partisan masculine credentials—especially those from the military, business world and the priesthood—in order to win presidential elections. For example, men such as Hugo Chávez leveraged their military credentials to rail against the two-party establishment and triumph as an outsider in the 1998 Venezuelan election. Vicente Fox capitalized on his background in big business to win the 2000 Mexican elections, ending the PRI's 70-year reign. Fernando Lugo tapped into his identity as a priest in order to do the same in the 2008 Paraguayan elections, ending the Asociación Nacional Republicana's 60-year reign. Despite inroads in the military and business worlds as well as the existence of women-only

religious orders, women generally are unable to tap into comparable experiences to win the presidency with only the backing of new or unestablished parties. Men can, and have, chosen from a greater variety of avenues to the presidency than solely via experienced parties.

Descriptive statistics, specifically contingency tables, enable exploration of this possibility. The major drawback of this analysis is that, unlike the regression models above, contingency tables do not control for potential confounders. These will help establish whether any baseline correlations might prove statistically significant.

Table 2 displays contingency tables for incumbency status and candidates' sex on the three measures of electoral performance: average vote shares, percentage achieving viability, and percentage of winners. To start, of the 11 women incumbents, vote shares averaged to 39.11%, and among the 48 male incumbents the statistic was similar: 38.01%. Of the 90 non-incumbent women who ran for president, vote shares averaged to 7.37%.

Table 4: The Impacts of Incumbency and Candidate Sex on Electoral Performance 1990-2019

	Women	Men
	% Vote Share	
Incumbent	39.11 (N=11)	38.01 (N=97)
Challenger	7.37 (N=90)	9.24 (N=735)
	% Achieved Viability	
Incumbent	100.00 (N=11)	88.66 (N=97)
Challenger	20.00 (N=90)	23.27 (N=735)
	% Victorious	
Incumbent	54.54 (N=11)	50.52 (N=97)
Challenger	3.33 (N=90)	7.89 (N=735)

Note: No sex differences reach statistical significance.

All 11 women incumbents have attained viability since 1990, but only 88.66% of the 48 male incumbents have also done so. Of the 90 non-incumbent women who ran for president, 20% achieved viability, and of the 370 men who ran as non-incumbents, 23% achieved viability. None of these sex differences in vote share and viability are statistically significant, suggesting that incumbency similarly affects this first measure of female and male candidates' electoral performance.

What about winning? 54.54% of the female incumbents won the presidential race, and 50.52% of the male incumbents did so. Women's slightly stronger record by this measure is not statistically significant. For non-incumbents, the relationship reverses: non-incumbent males seem to have better records. Just 3% of the non-incumbent women have won, and again, this statistic includes President Michelle Bachelet's 2013 comeback after sitting out a constitutionally-mandated term. Male non-incumbents seemed to fare better than their female counterparts, with 7.8% of them winning elections. This difference in non-incumbents' success rates is the only sex difference in Table 4 that is close to conventional levels of statistical significance ($p=0.12$).

To sum up, the statistical analysis these data cannot conclude that incumbency status boosts women's electoral prospects more than men's electoral prospectus. However, these non-significant results may be in part a product of the short historical record—and hence a lack of statistical power—as well as selection effects. The analysis suggests that parties' incumbency status unquestionably matters for both female candidates—but it also matters for their male counterparts.

3. Family Ties as an Alternative Route to the Presidency?

An alternative explanation for how women win the presidency relates to family ties (Jalalzai 2016). Women with presidential ambitions may be more likely than their male counterparts to leverage their familial connections—primarily as wives and daughters of prominent political figures—to access chief executive power. Family ties could provide women with the resources that they need—name recognition, networks, and financial capital—to launch viable and victorious campaigns.

Of all the possible family ties that women could have, spousal ties are likely to be the most relevant and somewhat unique to women: assuming the role of first lady probably would offer a greater boost to women's presidential ambitions than other kinds of kin connections. First ladies often possess unique opportunities to observe and acquire executive experience. Indeed, from 1990-2016, 88 women occupied the position of first ladies in Latin America, and 75% of these women became formally involved in a prominent policymaking area, such as health and education (Guerrero Valencia and Arana Araya 2019, 32).

Seven former or sitting first ladies in Latin America from 1990-2020 have run for president: Nora Gúnera de Melgar (Honduras 1997), Cristina Fernández (2007, 2011), Patricia Escobar (Guatemala 2011), Keiko Fujimori (2011, 2016), Xiomara Castro de Zelaya (Honduras 2013), Sandra Torres (Guatemala 2015), and Margarita Zavala (Mexico 2018) (Guerrero Valencia and Arana Araya 2019, 32). Fujimori is the only daughter of this group of first lady presidential candidates: she assumed the position during her father's, Alberto Fujimori's, presidency.

There are a few immediate reasons why a theory of incumbent parties would provide greater explanatory power than a family ties argument. Crucially, the only instance of a first lady winning the presidency is also the only instance of a first lady running with the backing of an incumbent party. The historical record thus lacks any instance of a first lady winning the presidency in the absence of the support of an incumbent party, but multiple women (Bachelet, Chinchilla and Rousseff) have won without family ties and with the support of an incumbent party.

The incumbent party theory moreover offers a potential re-interpretation of Fernández's rise as she ran for the Argentine presidency not only as a first lady, but also as the candidate of the incumbent *peronista* party. Existing scholarship argues that while international media accounts have frequently pointed to Fernández's first lady status as a primary reason for her victory, other perhaps more determinant factors related to her vast experience in elected legislative offices and her ability to consolidate the support of the *peronista* party in power (Reyes-Housholder and Thomas 2021).^{vi} Moreover, her status as a first lady may have

contributed to the Argentine media's deeply sexist coverage of her presidential campaigns (Piscopo 2010).

More than leverage family ties, Fernández tapped into Argentines' fidelity to Juan and Eva Perón who were of no relation to her (Andrews-Lee 2020). Moreover, Fernández achieved this in a way that parallels the way other men have reinvigorated charismatic movements. Although Fernández immediately succeeded Kirchner, Andrews-Lee (2020) considers Fernández a "self-starter" rather than anointed successor because she and Kirchner "planned a joint project to become Argentina's new saviors" (Andrews-Lee 2020, 13).

All of this suggests that the incumbent pathway to the presidency could include, but certainly does not require, family ties. In sexist, and yet, democratic contexts, the media and opposition also are more likely to criticize women's family ties as nepotism rather than a legitimate. If women are to eventually make durable inroads in presidential politics, they are unlikely to do so primarily through leveraging of family ties. Obtaining an incumbent party's nomination and launching a presidential candidacy via an incumbent party in the absence of clear family ties, such as running as a former first lady, may provide a path to the presidency that is more likely to be perceived as democratically legitimate.^{vii}

4. Summary and Conclusions

How and when do women democratically win the presidency? I argued that given women's marginalization in executive politics, incumbent parties can provide a route for women to achieve this. Vote-seeking parties are more likely to nominate women for president when these parties' weaknesses align with women's stereotypical advantages, most importantly, novelty and moral integrity. Incumbent parties are more likely than challenger parties to perceive such weaknesses and hence more likely to nominate women for president. Such affinities between incumbent parties and female candidates are fortuitous because incumbent parties possess vast resources needed to launch viable presidential campaigns.

This chapter's analysis of presidential candidates in 18 Latin American countries showed that from 2004-19 how certain contextual factors correlate with a greater tendency of parties across the board to back women. Parties had a greater likelihood of doing so when the political context provided them with incentives to signal change and novelty. These conditions specifically are when citizens trusted parties less and when citizens identify less with political parties. Finally, because women can also signal greater moral leadership, parties overall were more likely to nominate women in contexts of greater citizen perceptions of corruption. Table 1's results provided the most consistent support for the theory's main prediction: parties' incumbency status exerts a positive and significant impact on their likelihoods of nominating women for president.

The models' results further suggest that several factors that could plausibly affect parties' likelihoods of nominating women actually do not appear significant. Neither parties' ideology, the quantity of female legislators, nor macroeconomic conditions independently exert significant impacts on parties' likelihoods of nominating women.

Figure 1 suggested that the positive relationship between incumbency status and female nominees is time-bound to the post-2004 era. The question of why incumbent parties started to

nominate more women than non-incumbent parties after 2004 is beyond the scope of this chapter. The shift could relate to the region's left turn, a quota-spurred influx of women in politics, a greater influence of international pro-women norms, or all of these factors (Towns 2012; Franceschet, Krook, and Piscopo 2012; Levitsky and Roberts 2011).

The expectation that incumbent rather than non-incumbent parties are more likely to nominate women may initially seem counter-intuitive. Global research suggests that the more powerful the executive position—specifically presidencies such as those in Latin America with high concentrations of power—the more men will seek to obtain that position and the more likely they are to exclude women (Jalalzai 2013). One might suspect therefore that incumbent parties, given their privileged positions, would be even more likely to exclude women than non-incumbent parties. Similarly, smaller, less electorally successful parties that are more likely to nominate women than the electorally stronger parties in economically advanced countries (O'Brien 2015).

Regarding the second stage of the presidential selection process, this chapter also showed how important parties' incumbency status actually is for performances in these elections. Incumbency status overall does positively and strongly affect all three measures of electoral performance: vote share, viability, and victory. Candidates from incumbent parties enjoy higher vote shares and greater likelihoods of not only mounting a viable campaign but also of winning the election. None of the data at hand, however, statistically suggests that incumbency status benefits women more than men: both sexes enjoy boosts. However, the number of non-incumbent men who have won the presidency (58) far outnumber the quantity of non-incumbent women who had done so (2), suggesting that men enjoy a greater diversity of non-incumbent routes to the presidency.

The nature of the historical record, that is, women's historical exclusion from presidential competitions, means that the Latin American data do not enable a robust regression analysis of when incumbent parties nominate women for president. Yet, these limitations, coupled with some non-significant results in sex differences from the contingency tables, hardly provide evidence of gender-neutral processes (Bauer 2020), but rather suggest that we need different kinds of methodological tools, namely qualitative, historical tools.

The subsequent chapters therefore pick up where this chapter has left off, by inductively developing the incumbent pathway theory via case studies of the Concertación and the Asociación Nacional Republicana. Focus on the first stage of the presidential selection process, Chapters 4 and 5 closely examining party-based incentives to nominate women for president. These chapters integrate evidence from newspaper accounts, personal interviews, and secondary analyses of the campaigns to show that the Concertación and Asociación Nacional Republicana sought to project novelty, feminine leadership and moral integrity by nominating women for president.

Chapter 4 shows that the Concertación leaders in Chile indeed perceived widespread dissatisfaction with political elites and the coalition sought to project novelty and change. The chapter illuminates how Michelle Bachelet through discourse and symbols leveraged her gender identity as a single mother to portray herself as an empathetic, and yet highly competent, political outsider. Chapter 5 unpacks how key leaders in the Asociación Nacional Republicana in

Paraguay, specifically sitting President Nicanor Duarte, faced criticisms of entrenched, corrupt, authoritarian leadership. To help modernize her party's image and convey change, Blanca Ovelar also discursively leveraged her identity as a woman to argue that she offered novel, modern, and honest leadership. These chapters collectively suggest that rather than a single kind of contextual incentive, it is instead a cluster of gendered calculations that can motivate incumbent parties to nominate a female over a male presidential candidate.

Chapter 6 moves to the second and final stage of the presidential selection process in seeking to understand what gendered factors can determine whether female incumbents defeat or lose to male challengers. To win, a major challenge to female incumbents is establishing their autonomy from the male establishment of their party or coalition. For female incumbents, projecting autonomy requires mobilizing a core constituency of voters that appears independent of the sitting male president and running a campaign that is not dominated by the sitting male president.

Chapter 6 argues that Bachelet's ability to project autonomy and Ovelar's inability to do so helps explain the divergent outcomes in this second stage of the presidential selection process. Bachelet's ability to mobilize a core constituency of women on the basis of gender identity boosted her poll numbers, helped convince male Concertación leaders that she was undoubtedly the best-suited candidate to win, and distinguished her from the popular sitting male president Ricardo Lagos. Projecting autonomy, Bachelet convinced voters through her discourse and symbols that her identity as a woman made her *better-suited* for the presidency than her male challengers: as a woman, she was able to embody novelty, empathetic, horizontal leadership and moral integrity. Male Concertación leaders followed Bachelet's lead, lining up behind her candidacy.

In contrast, Ovelar was never able to project autonomy from sitting President Nicanor Duarte who overshadowed and dominated her campaign. Despite winning the ANR's 2007 primary and her own political talent, she failed to fully rally her party behind her candidacy. Several males from the ANR establishment decided not to support her in part because of sexism, but also that she was never able to outperform the male challenger, Fernando Lugo, in the polls. Key to Lugo's dominance in the polls relates to his ability to leverage his identity as a priest to convey novelty, empathetic leadership and moral integrity, thereby outperforming Ovelar on women's stereotypical strengths. All of these factors contributed to her electoral loss, which ended 60 years of the ANR's rule in Paraguay.

Tables and Figures**Table 1A: Former presidents who competed for a non-consecutive term**

Country	Candidate	Year
Argentina	Carlos Menem	2003
Argentina	Eduardo Duhalde	2011
Bolivia	Carlos Mesa	2019
Chile	Michelle Bachelet	2013
Chile	Sebastián Piñera	2017
Dominican Republic	Joaquín Balaguer	2000
Dominican Republic	Leonel Fernández	2004
Ecuador	Lucio Gutiérrez	2013
Nicaragua	Daniel Ortega	1996, 2001, 2006
Nicaragua	Arnoldo Alemán	2011
Peru	Alejandro Toledo	2011, 2016
Peru	Alán García	2016
Uruguay	Tabaré Vázquez	2014

Table 2A Presidential Elections and LAPOP Fieldwork Dates

Country	First-Round Voting	Survey Fieldwork
Argentina	10 / 2007	12 / 2007- 1/ 2008
Argentina	10 / 2011	3-4 / 2010
Argentina	10 / 2015	2-3 / 2014
Argentina	10 / 2019	
Bolivia	12 / 2005	10 / 2004
Bolivia	12 / 2009	2-3 / 2008
Bolivia	10 / 2015	3-5 / 2014
Bolivia	MONTH / 2019	
Brazil	10 / 2006	June-July 2007 8 months
Brazil	10 / 2010	March-April 2010
Brazil	10 / 2014	March-April 2014
Brazil	10 / 2018	April-May 2017
Chile	12 / 2005	July-August 2006 7 months
Chile	12 / 2009	December 2007-January 2008
Chile	11 / 2013	March-May 2012
Chile	11 / 2017	March-May 2017
Colombia	5 / 2006	2005
Colombia	5 / 2010	April-May 2010
Colombia	5 / 2014	March-May 2014
Colombia	5 / 2018	August-October 2016
Costa Rica	2 / 2006	February-March 2004
Costa Rica	2 / 2010	January-February 2010
Costa Rica	2 / 2014	March-May 2014
Costa Rica	2 / 2018	August-September 2016
Dominican Republic	5 / 2004	January-April 2004
Dominican Republic	5 / 2008	March 2008
Dominican Republic	5 / 2012	January-February 2012
Dominican Republic	5 / 2016	October-December 2016
Ecuador	10 / 2006	January 2006
Ecuador	4 / 2009	January-February 2008
Ecuador	2 / 2013	February 2012
Ecuador	2 / 2017	November 2016-January 2017
El Salvador	3 / 2004	April-May 2004
El Salvador	3 / 2009	February 2008
El Salvador	2 / 2014	March-April 2014
Guatemala	11 / 2007	July-August 2006
Guatemala	9 / 2011	January-March 2010
Guatemala	9 / 2015	April-May 2014
Guatemala	MONTH 2019	
Honduras	11 / 2005	February-March 2004
Honduras	11 / 2009	February-March 2008
Honduras	11 / 2013	January-February 2012

Honduras	11 / 2017	October-November 2016
Mexico	7 / 2006	June 2006
Mexico	7 / 2012	January-February 2012
Mexico	7 / 2018	January-March 2017
Nicaragua	11 / 2006	June-July 2006
Nicaragua	11 / 2011	January-February 2010
Nicaragua	11 / 2016	September-October 2016
Panama	9 / 2004	March 2004
Panama	5 / 2009	February 2008
Panama	5 / 2014	March-May 2014
Panama	Month / 2019	
Paraguay	4 / 2008	February-March 2008
Paraguay	4 / 2013	February 2012
Paraguay	4 / 2018	October-November 2016
Peru	4 / 2006	June-July 2006
Peru	4 / 2011	January-February 2010
Peru	4 / 2016	January-February 2014
Uruguay	10 / 2009	March-April 2008
Uruguay	11 / 2014	March-April 2014
Uruguay	Month / 2019	
Venezuela	10 / 2012	January-February 2010
Venezuela	4 / 2013	February-March 2012
Venezuela	5 / 2018	October 2016-January 2017

Table 3A Descriptive Statistics 2004-19

Type	Name	N	Mean	Std. Dev.	Min	Max
Dependent	Candidate sex	503	0.13	0.33	0	1
Dependent	First-round vote share	507	0.13	0.17	0.0001	0.72
Dependent	Viability	507	0.32	0.47	0	1
Dependent	Election winner	503	0.13	0.34	0	1
Contextual	Party identification	469	32.47	14.67	10.26	70.26
Contextual	Trust in parties	507	2.91	0.44	1.94	4.45
Contextual	Citizens' corruption perceptions	440	46.57	10.36	24.77	66.05
Contextual	Expert assessments of public corruption	507	47.91	23.26	7	97
Contextual	Expert assessments of executive corruption	507	51.39	24.41	3	97
Party-level	Ideology	421	11.02	4.76	1.6	19
Party-level	Incumbent	482	0.12	0.33	0	1
Control	Female legislators	507	21.08	10.35	5.5	53.1
Control	Unemployment	443	7.29	2.44	3.3	12.3
Control	GDP growth	507	4.00	3.14	-18	9
Control	Inflation	501	9.60	39.39	0	438.1
Control	Number of candidates competing	507	9.13	3.81	3	20

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ii Nicaragua, of course, elected the region’s first female president in 1990: Violeta Chamorro, but no other women have run for president since Chamorro. Soraya Aquino of the Partido de Unidad Nacional ran for president in the Dominican Republic in 2016. María Bolívar of the Partido Democrático Unidos por la Paz y la Libertad and Reina Sequera Poder of Laboral—ran for president in the 2012 and 2013 Venezuelan elections. However, country fixed effects in this model means that the Dominican Republic and Venezuelan data are dropped because there are no data on corruption perceptions in this particular presidential election.

iii A similar operationalization was first justified by Reyes-Housholder and Thomas (2021).

^{iv} For example, in the 2019 Uruguayan elections Daniel Martínez vote the first-round vote with 39.02% compared to Luis LaCalle's 28.82%, but LaCalle eventually defeated Martínez in the second round of voting and hence assumed the presidency.

^v Sexist media coverage—particularly excessive coverage of her physical appearance rather than her presidential credentials—likely contributed to Sáez's strong beginning and weak finish (Hinojosa 2010).

^{vi} “Her victories are not first and foremost explained by her marriage. Accounts of Fernández political scent tend to overstate Kirchner's role, thereby underplaying her own political genius. Their political ambitions manifested around the time of their adolescent romance, and their careers remained intertwined until Kirchner's death in 2010. This suggests that even if Fernández—who commanded national power as a Senator prior to the presidency—benefited from marital ties, then Kirchner likely did as well.”

^{vii} Of all the women who have won the Latin American presidency, Chamorro's case seems to provide the most obvious outlier to the incumbent pathway theory. Historians describe Chamorro as lacking political experience, arguing that she rose to power by primarily by evoking her husband (Saint-Germain 2013). Her coalition, Uno, was not expected to win. Chamorro had never officially belonged to a political party, and with the support of Uno, she ran as a candidate from a challenger party. Despite her large margin of victory, Chamorro's legitimacy as president and capacity to govern was questioned and she was seen as a temporary or “stand-in” leader (Saint-Germain 2013).