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Spouses as Campaign Surrogates: Strategic Appearances by Presidential and Vice Presidential Candidates' Wives in the 2004 Election

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"To reach voters, surrogates, especially wives, have become indispensable members of the presidential candidates' supporting cast . . . It is their strategic use within the campaign that has made wives a force in contemporary presidential elections, not their independent quantitative effect on the vote."

Barbara Burrell (2001, 111–2)

"Having your spouse on the campaign trail is the most visible endorsement of your candidacy. It says to audiences, 'My wife or my husband is supportive of what I'm doing.' We like to know the character of a candidate, and we put his or her family in that particular basket."

Myra Gutin (Baer 2004)

"Very often in these campaigns, in fact more often than not, the wives are a separate campaign unto themselves because two can cover twice as much ground as one. So very rarely do candidates and their wives campaign together."

Candy Crowley (2007)

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It is clear from the presidential primary campaign that 2008 can legitimately be labeled "the year of the spouse as surrogate." The sheer number of candidates on both sides of the aisle and the heavily front-loaded campaign season have made using the wives—and husband—of the candidates a "must." Never before has media attention been so heavily focused on the spouses. In fact, they have often been an equal, or in some cases, bigger story than the candidates themselves. The same pattern will characterize the spouses of the vice presidential candidates. The bottom line is that use of presidential and vice presidential spouses has become an integral part of presidential campaigns. In this article, we detail how the Bush and Kerry camps strategically scheduled spouses in the final days of the campaign—from Labor Day until Election Day. We conclude with some thoughts about what to expect in 2008.

Presidential candidates cannot be everywhere they need—or want—to be at once. Consequently, they have to rely on high profile surrogates to represent them on the campaign trail. Historically, their vice presidential running mates have played that role and/or, in the case of incumbent presidents, their most popular Cabinet members. Over the course of history, however, as women have gained clout at the ballot box, the campaign-related activities of candidates' wives, primarily wives of winning presidential candidates, have gradually received more attention from scholars and journalists (cf. Mughan and Burden 1995;

O'Connor, Nye, and van Assendelft 1996; Truman 1995; Boller 1998; Gutin 1989; Grimes 1990; Troy 2000; Burrell 2001; Gould 2001; Caroli 2003; Watson and Eksterowicz 2003; Wertheimer 2005). Up to now, the spousal activities of the losing candidate have received little methodical academic attention. The same is true for the spousal activities of the vice presidential candidates, with one exception (see Dunlap 1988). But media coverage in the 2004 campaign of the spouses of both presidential and vice

presidential candidates demands that we look more closely at spousal roles.

To date, no empirically based, comparative analyses have tracked the frequency, timing, and structure of appearances by the candidates' spouses on the campaign trail. The purpose of this study is to begin to fill that void by examining the degree to which the major party presidential campaigns strategically planned the appearances of the wives during the 2004 campaign. The results provide a much-needed baseline to measure the 2008 and subsequent presidential campaigns against. It is clear that the study of spousal surrogates will become even more important as their gender and race/ethnicity become more diverse.¹

The primary assumption being tested is that decisions about spousal appearances have become critical to a presidential campaign. In fact, in 2004, both the John Kerry and George W. Bush campaign playbooks contained sections devoted to the strategic use of the candidates' wives on the campaign trail.² Both presidential campaigns recognized that women had become a larger proportion of registered (and actual) voters than in 2000 and an increasingly critical swing vote (MacManus 2006). However, the appearances of Laura Bush, Theresa Heinz Kerry, Lynne Cheney, and Elizabeth Edwards were rarely limited to female audiences, especially since their visits got considerable media attention—itsself a primary goal of their increasingly visible and important role as surrogates for their candidate husbands.

Previous Research

Most of the research on campaigning by presidential candidates' spouses has been dominated by retrospective looks at the first ladies, rather than at all four spouses on both major party presidential tickets. The focus, at least through the 2004 election, has largely been on these first ladies' own personal attributes—speaking ability, warmth, attractiveness and clothing, relationship with their husband and family, and skill at

complementing or enhancing their husband's candidacy—rather than on how their appearances were strategically planned as part of the larger campaign (although the 2004 campaign suggests the two may be related). Margaret Truman in *First Ladies: An Intimate Group Portrait of White House Wives* (1995, 16) describes the spouses in action as “democracy in skirts.”

As Gould comments on the public's expectations from the first lady: “The role of the president's wife has responded to changes in the nation's highest office itself and the social demands on women . . . The public expects the First Lady to fulfill a multitude of roles flawlessly, and there is criticism at any departure from the perceived standards” of the day (2001, xi). These “standards” often include style of dress, make-up, social skills, appearance venues, the marriage partnership, parenting skills, and even the friends she keeps. Thus, one would expect presidential campaigns to pay close attention to polls showing any negativity toward the presidential and vice presidential candidates' wives among certain constituencies and to adjust their use as surrogates on the campaign trail accordingly. Some of these opinions are obviously driven by media coverage of women in general. Heith (2003, 126) singles out the press corps' inclination to “lipstick watch”—to focus on “clothing, make-up, hair, and other distinctly feminine categorizations.” But increasingly the policy stances of these surrogates have played a big part in the formation of the public's opinions of them. Of particular interest to the media (and then the public) is when the spouses express policy views that seem counter to the candidate's position on hot button issues like abortion or war.

The first ladies' speech and verbalizations, often tempered by experience on the campaign trail, has been described by Wertheimer (2005, x) as, “[t]he difficulty of learning how to funnel one's spontaneous verbalizations and actions into a form appropriate to the public role . . . [O]ften they have not practiced enough to cope with the demands placed upon them as public communicators.” Yet their communication skills greatly affect how they interface with and are covered by the news media, a task some are better at than others but one that cannot be avoided (cf. Caroli 2003). Watson and Eksterowicz (2003, 7) make the point that “with the modern, media-saturated presidential campaign . . . first ladies have become well-known fixtures on the campaign stump and have not been given the luxury of declining to participate in the campaigns.”

According to Grimes (1990, 15), the role of wives on the campaign trail is to “provide a window to the candidate's character” (Grimes 1990, 16). Others see the candidates' wives as playing an important part in registering more women to vote, prompting them to go to the polls, and thus narrowing the gender gap (cf. Watson 2006).

Burrell (2001) establishes the 1960s as the start point for the media-saturated campaigns for two reasons: the emergence of candidate- rather than party-centered presidential campaigns and the rise of the second women's movement. She concludes that candidate-centered campaigns by necessity must rely more on surrogates “to generate attention to their campaign, raise money, and rally the faithful” (Burrell 2001, 111).

Several studies have found that presidential candidates' spouses do affect a person's vote for president (cf. Mughan and Burden 1995), but not just among women. For some, the connection with the spouse is via issues; for others, it's through style, demeanor, children, or personality. Although scholars have viewed the role of wives as a way to close the gender gap both in terms of turnout and vote choice, the correlation has not proven to be as strong as expected, primarily because quantitative studies cannot establish causal relationships³ (Burrell 2001, 112) and the women's vote is not monolithic (cf. Carroll and Fox 2006).

Sparse Literature on Candidate and Spouse Appearances

The overemphasis on the first ladies' personal attributes rather than on the strategy behind their appearances as surrogates is not surprising. Prior to the 2000 election Shaw (1999, 345) observed that data on the personal appearances by candidates were “sparse in the election literature” in spite of their importance to the overall campaign. His analysis of presidential campaign appearances in 1988, 1992, and 1996, primarily in battleground states, found that strategically planned appearances “can move a statewide electorate” (Shaw 1999, 356). Appearances are most effective if repeated, especially close to Election Day. Shaw also found that “the amount of campaigning from week to week shows that the opposition usually matched increases in . . . appearances within two weeks” (1999, 357).

Candidates' appearances have particular value in generating media attention. King and Morehouse (2004, 1) argue: “Local campaign appearances generate tremendous free media coverage, which often offsets the ‘costs’ of appearing be-

fore relatively small audiences in out-of-the-way parts of America. Indeed, in many instances, local campaign appearances likely ‘move’ the vote more than higher priced advertisements.” They are covered by local news that “is less cynical about politics and more favorable towards the candidates” (King and Morehouse 2004) and more regularly watched than either cable or national network news programs (Pew Research Center 2004).⁴

In the heat of a highly competitive presidential campaign, a visit by a high profile political figure, whether it is the candidate or a surrogate, will get coverage in multiple news cycles: the day before, the day of, and the day after an event. It may even get national news coverage. However, it is the local news coverage that candidates seek most with their visits. Karl Rove, the Republican strategist, knew this well. The Republican Party's 2004 Get-Out-The-Vote strategy “involved local presidential visits, timed to bring out the party faithful and to attract local media coverage” (King and Morehouse 2004, 8).

Increasingly, the media have covered appearances by candidates' wives as well as by the candidates: “[S]ince the advent of television . . . the American public has gone from wanting to expecting more appearances from candidates' spouses. So modern campaign wives, with some help from campaign strategists, have learned to adjust” (historian Betty Boyd Caroli in Ortiz and Uebelherr 2004).

Primary Research Question

Our primary research question is, “Do the appearances of the presidential and vice presidential candidate spouses—the spousal surrogate campaign—follow the same patterns as scholars have observed for the presidential candidates over the past several decades?” We are particularly interested in whether presidential campaigns are as strategic in their use of the candidates' surrogate wives as in their use of the candidates. We believe the spouses of all four major party presidential and vice presidential candidates are now under the media microscope just as much as their husbands—a theory that has gained weight since the 2004 election.

The Research

To date, little empirical research has been done on the campaign appearances of the spousal surrogates. In this paper, we analyze their appearances from Labor Day⁵ until Election Day (September 2–November 2, 2004).

Specifically, we examine the frequency, timing, and structure of their

visits: (1) which states (battleground vs. non-battleground) were visited and how often; (2) how many visits took place before the first presidential debate (September 30) and after the third, and last, presidential debate (October 13); (3) what was the nature of the appearance; (4) what was the type of event in which they participated; (5) what was the targeted audience of the event; and (6) what was the primary focus of the event.

Hypotheses

Based on previous research and our own intuition, we hypothesize the following:

- H1: Campaigns will alter the appearance patterns—frequency, place, audience, type of event—of spouses as the campaign progresses.
- H2: Spouses will be more likely to visit battleground than non-battleground states.
- H3: Spouses will make more appearances the closer to Election Day.
- H4: One party's scheduling of spousal appearances will "answer" the opposition's spouses' appearances within a short time.
- H5: Spouses will make more solo than joint appearances with their husbands.
- H6: Spouses will make more solo appearances in the early part of the campaign and more joint appearances as the campaign winds down.

Data Sources

During the 2004 election, the ABC News political unit published "The Note," a summary of the day's most important political news and events including the appearances of the presidential and vice presidential candidates and their wives. On the weekends when "The Note" was not published, we retrieved data from the candidates' web sites (johnkerry.com and whitehouse.gov). We cross-referenced all data with information posted on the George Washington University's Democracy in Action web site (www.gwu.edu/~action).⁶

Appearance data for public events (i.e., open to media coverage) were collected from September 2 to November 2, 2004, for Laura Bush, Teresa Heinz Kerry, Lynne Cheney, and Elizabeth Edwards.

We retrieved election return data for 2000 (used to determine red and blue

states) and for 2004 to calculate margin of victory from the "Statistical Abstract of the United States 2006" (www.census.gov/prod/2005pubs/06statab/election.pdf, Table 388, 249).

We retrieved data on the Electoral College votes by state in 2000 and 2004 from www.fec.gov/pages/electvote.htm ("Distribution of Electoral Votes").

Battleground states were those CNN identified as "showdown" states: Colorado, Florida, Iowa, Maine, Michigan, Minnesota, Missouri, Nevada, New Hampshire, New Mexico, Ohio, Oregon, Pennsylvania, West Virginia, and Wisconsin (see www/cnn.com/ELECTION/2004/special/polls/index.html). Of these 15 battleground states, eight were blue (Iowa, Maine, Michigan, Minnesota, New Mexico, Oregon, Pennsylvania, and Wisconsin). Of those blue battleground states, the ones that were the most competitive all the way to the end were Iowa, Michigan, Minnesota, Pennsylvania, and Wisconsin. Of the seven red battleground states, the ones most up-for-grabs near the end of the campaign were Florida, Ohio, and New Hampshire.

Findings

There was no shortage of press coverage of the candidates' wives in 2004. Headlines ran the gamut—from focusing on their major political role on the campaign trail to complaining about their traditional personal attributes. Here's a sample of those headlines: "Candidates' Wives Play Supporting Roles: They Balance Families, Careers and Spouse's Ambitions" (Loughlin 2004), "The High-Wire Act: Candidates' Wives Face the Seemingly Impossible Task of Meeting the Public's Widely Varied Expectations" (Swanson 2004), and "Candidates' Wives Trivialized by Press" (Gibbons 2004).

The first story mentions the varied backgrounds of the primary candidates but stresses their vital role on the campaign trail: "Their roles in the campaigns have varied, but each of these women—all of whom are mothers—has made an impression on the campaign trail, whether by virtue of their own speeches and stumping, or their backgrounds" (Loughlin 2004). In contrast, in the last story, Gibbons (2004) complains that "despite growing recognition of the press of their broadened role, some recent coverage doesn't seem to have caught on. The women are too often treated as decorative add-ons . . ." In spite of the different perspectives on how the press was covering the wives' campaign activities, no one disagreed on their use as surrogates for their husbands.

Frequency of Appearances: Bush and Edwards Tops for Their Tickets

Both the Bush-Cheney and Kerry-Edwards campaigns relied heavily on the candidates' spouses to help them reach more voters, especially in the battleground states. As shown in Table 1, the four wives made 376 appearances between Labor Day and Election Day: Laura Bush (125), Elizabeth Edwards (112), Lynne Cheney (83), and Teresa Heinz Kerry (76).

The fact that a vice presidential candidate's spouse (Elizabeth Edwards) made more appearances than the ticket's presidential candidate's spouse (Teresa Heinz Kerry) reflects two things. First, it shows the strategic nature of a presidential campaign's use of surrogates; as Teresa Heinz Kerry's popularity declined, the Kerry-Edwards campaign turned more to Elizabeth Edwards. Second, it affirms the need to follow all four candidates' wives, not just the spouses of the presidential nominees.

Jill Lawrence of *USA Today* describes Edwards' appeal on the campaign trail (2004):

Edwards' intellect, termed a "weapon of mass destruction" by a former courtroom rival, is one side of what she brings to the 2004 campaign . . . The other side is what Teresa Heinz Kerry . . . calls Edwards' "mother earth" quality. That is, her grounding in a life familiar to most Americans: raising kids, coaching soccer, volunteering at school, struggling with her weight, juggling work and family.

Edwards' filling in for Teresa Heinz Kerry is somewhat similar to the 1960 campaign when Lady Bird Johnson served as surrogate for Jackie Kennedy, but for different reasons. Jackie Kennedy was pregnant for most of the campaign, and daughter Caroline was still a toddler. Furthermore, she didn't like the campaign trail; she felt bombarded by the news media who loved her (Carlin 2005). In 2004, by contrast, Teresa Heinz Kerry got too much negative press (from the Kerry-Edwards campaign perspective) with her off-the-cuff comments. As Kurtz (2004, C01) notes: "Teresa Heinz Kerry hardly suffered from a lack of media attention during the presidential campaign." But it quickly became apparent that it was not the type of attention the ticket wanted.

Much has been written about the ineffectiveness of Heinz Kerry as a surrogate campaigner relative to Laura Bush:

[Sen.] Kerry's inability to connect was exacerbated by the public's perception of

Table 1
Spousal Appearances (Publicly Announced) by State: 2004
 (Red states = bold)

State	Laura Bush (R)	Teresa Heinz Kerry (D)	Lynne Cheney (R)	Elizabeth Edwards (D)	Total*	Electoral College Votes 2004	Comp. Factor**
Alabama	0	0	0	0	0	9	0.00
Alaska	0	0	0	0	0	3	0.00
Arizona	1	4	0	0	5	10	0.50
Arkansas	0	0	0	1	1	6	0.17
California	0	3	0	0	3	55	0.05
Colorado	1	2	3	2	8	9	0.89
Connecticut	0	0	0	0	0	7	0.00
Delaware	0	0	0	0	0	3	0.00
District of Columbia	0	1	0	0	1	3	0.33
Florida	17	10	9	7	43	27	1.59
Georgia	0	1	0	0	1	15	0.07
Hawaii	0	0	1	0	1	4	0.25
Idaho	0	0	0	0	0	4	0.00
Illinois	1	0	1	0	2	21	0.10
Indiana	1	0	0	0	1	11	0.09
Iowa	11	8	10	19	48	7	6.86
Kansas	0	0	0	0	0	6	0.00
Kentucky	0	0	0	0	0	8	0.00
Louisiana	1	0	1	0	2	9	0.22
Maine	1	0	0	4	5	4	1.25
Maryland	0	0	0	0	0	10	0.00
Massachusetts	0	1	0	1	2	12	0.17
Michigan	6	0	8	9	23	17	1.35
Minnesota	4	2	6	6	18	10	1.80
Mississippi	0	0	0	1	1	6	0.17
Missouri	2	2	2	2	8	11	0.73
Montana	0	0	0	0	0	3	0.00
Nebraska	0	0	0	0	0	5	0.00
Nevada	4	1	3	2	10	5	2.00
New Hampshire	8	2	1	7	18	4	4.50
New Jersey	2	0	1	0	3	15	0.20
New Mexico	6	4	1	1	12	5	2.40
New York	1	2	1	0	4	31	0.13
North Carolina	0	0	0	6	6	15	0.40
North Dakota	0	0	0	0	0	3	0.00
Ohio	15	3	11	13	42	20	2.10
Oklahoma	0	0	0	0	0	7	0.00
Oregon	2	1	1	0	4	7	0.57
Pennsylvania	7	25	7	10	49	21	2.33
Rhode Island	0	0	0	0	0	4	0.00
South Carolina	1	0	0	0	1	8	0.13
South Dakota	0	0	0	0	0	3	0.00
Tennessee	0	0	0	0	0	11	0.00
Texas	2	2	0	0	4	34	0.12
Utah	0	0	0	0	0	5	0.00
Vermont	0	0	0	2	2	3	0.67
Virginia	0	0	1	2	3	13	0.23
Washington	0	2	0	0	2	11	0.18
West Virginia	1	0	2	7	10	5	2.00
Wisconsin	10	0	11	10	31	10	3.10
Wyoming	0	0	2	0	2	3	0.67
Total	105	76	83	112	376	538	0.70

*Total appearances by all candidates' wives. **The "competitiveness factor" is the ratio of total visits by all candidates' wives to Electoral College votes.

his wife Teresa and her Heinz fortune. Mrs. Heinz Kerry's off-hand remark during the campaign questioning that First Lady Laura Bush had never held a real job definitely hurt her husband's candidacy. Pollsters in both parties say that Mrs. Bush, a former librarian, enjoys perhaps the greatest popularity of any First Lady in history. Mrs. Kerry, meanwhile, is seen as one of the richest people in the country and one of the very few with her own private jet. (Cook 2006, 290)

It was Teresa Heinz Kerry's personal attributes—namely, her speaking style and wealth—that didn't jibe with what many wanted in a first lady. Gail Sheehy in "Transforming Teresa" (2004) described her as "unpredictable, super-rich, charming, prickly, high-powered, and very conflicted." She argued that Heinz Kerry never really warmed up to the idea of being on the campaign trail, especially in joint appearances with her husband:

She will go wherever his schedulers tell her to go, usually at the last minute. Yet there is something held back about her, something uncomfortable, an I'd-rather-be-almost-anywhere-else disdain for the moneygrubbing, ___-kissing, bromide-mouthing ritual that American presidential candidates must endure.

But the fact remained that she did go wherever John Kerry's campaign schedulers told her to go, as did the other wives on the 2004 campaign trail.

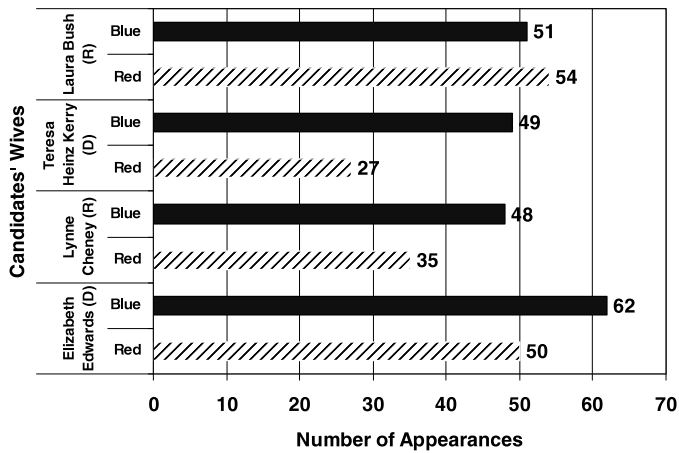
Red vs. Blue State Appearances

Both presidential campaigns sent the wives to blue states more often than to red states, the exception being Laura Bush (see Figure 1). Overall, the number of spouse visits to the blue states was 210 (E. Edwards, 62; L. Bush, 51; T.H. Kerry, 49; L. Cheney, 48); for the red, 166 (L. Bush, 54; E. Edwards, 50; L. Cheney, 55; T.H. Kerry, 27).

The reason was that a higher proportion of the battleground

Figure 1 Presidential and Vice Presidential Wives' Appearances: Red vs. Blue States, September 2–November 2, 2004

Red vs. Blue for Candidates' Wives Appearances



Note: Only publicly announced or media-monitored events are included in this analysis.

Sources: Appearances data calculated from ABC News's "The Note," published from September 2 to November 2, 2004; George Washington University's Democracy in Action 2004 web page; and candidates' web sites.

states were blue states that Democrats felt compelled to defend and Republicans aggressively tried to flip. This pattern dovetails with analyses in the middle of the campaign that described the GOP shifting gears away from defending red states toward putting the Democrats on the defensive in key blue states. For example, Republican candidates' wives visited Michigan 14 times, while Elizabeth Edwards visited nine times. And the GOP wives visited Wisconsin 21 times compared to 10 visits by Elizabeth Edwards (see Table 2).

Teresa Heinz Kerry's liabilities, as reflected in polls, prompted the Kerry-Edwards campaign to greatly limit her appearances in red states and to rely more on Elizabeth Edwards from North Carolina to reach the more conservative, mostly southern, states (see Figure 1). For example, the total number of visits Heinz Kerry made to red states (27) was almost the same as the number of visits to her home state alone, Pennsylvania (25). Elizabeth Edwards picked up the slack; she made 50 appearances in red states, just four fewer than Laura Bush (54).

Battleground State Appearances

The battleground states received the most visits by the four wives, but especially by Laura Bush and Elizabeth Ed-

wards. Overall, the spouses visited the battleground states 329 times (E. Edwards, 99; L. Bush, 95; L. Cheney, 75; T.H. Kerry, 60), and the non-battleground states 47 times (T.H. Kerry, 16; E. Edwards, 13; L. Bush, 10; L. Cheney, 8) (see Figure 2). Edwards has often been credited with being an excellent campaign strategist herself in addition to being effective on the campaign trail, as detailed by *New York Times* reporters Broder and Naughton (2007):

Mrs. Edwards had a prominent role in his failed 2004 campaign for president, both as a behind-the-

scenes player intimately involved in the management of the campaign and on the trail on behalf of her husband. She was widely viewed as an effective surrogate for Mr. Edwards in 2004, particularly with blue collar audiences.

Two states—Ohio and Pennsylvania—were visited more frequently by the party that won the state in 2000. Each was effectively playing defense. Republican wives visited Ohio 26 times and Demo-

cratic wives visited 16 times. In contrast, Pennsylvania received 35 visits from Democratic wives and 14 from Republican wives. Both states stayed true to their 2000 colors.

Focus on the Electoral College Map

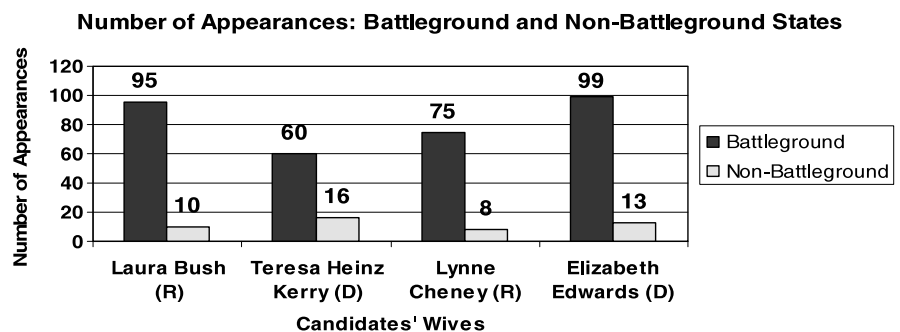
It is clear that both the Kerry-Edwards and Bush-Cheney campaigns had the Electoral College map in mind in planning the spouses' visits. They kept the campaigns focused on small and medium-sized states in addition to the more populous ones—ever wary that some of the smaller states could be the margin of victory in the Electoral College vote.

It was an effective strategy. When we compared the total visits of these candidates' wives to each state's total Electoral College votes (see Table 1), those with the highest ratios—i.e., those most dense in wives' appearances—were Iowa (6.86), New Hampshire (4.5), Wisconsin (3.1), and New Mexico (2.4). Three of these four states were the only ones to flip colors in 2004: Iowa and New Mexico turned to red from blue; New Hampshire shifted to blue from red. Wisconsin stayed blue but by only a sliver.

States Not Visited by the Surrogate Wives

Of the 16 states the surrogates did not visit (see Table 3), most were safe red states and only four were sure blue states (Connecticut, Delaware, Maryland, and Rhode Island). This is further evidence that the surrogate wives were being strategically used by their respective presidential campaigns. It is interesting to note

Figure 2
Presidential and Vice Presidential Wives' Appearances to Battleground and Non-Battleground States, September 2–November 2, 2004



Note: Only publicly announced or media-monitored events are included in this analysis.

Sources: Appearances data calculated from ABC News's "The Note," published from September 2 to November 2, 2004; George Washington University's Democracy in Action 2004 web page; and candidates' web sites.

Table 2
Summary of Spouse Appearances by Party and Position: All 50 States and D.C. (Red states = bold)

State	REP Wives*	DEM Wives**	PRES Wives†	VP Wives‡
Alabama	0	0	0	0
Alaska	0	0	0	0
Arizona	1	4	5	0
Arkansas	0	1	0	1
California	0	3	3	0
Colorado	4	4	3	5
Connecticut	0	0	0	0
Delaware	0	0	0	0
District of Columbia	0	1	1	0
Florida	26	17	27	16
Georgia	0	1	1	0
Hawaii	1	0	0	1
Idaho	0	0	0	0
Illinois	2	0	1	1
Indiana	1	0	1	0
Iowa	21	27	19	29
Kansas	0	0	0	0
Kentucky	0	0	0	0
Louisiana	2	0	1	1
Maine	1	4	1	4
Maryland	0	0	0	0
Massachusetts	0	2	1	1
Michigan	14	9	6	17
Minnesota	10	8	6	12
Mississippi	0	1	0	1
Missouri	4	4	4	4
Montana	0	0	0	0
Nebraska	0	0	0	0
Nevada	7	3	5	5
New Hampshire	9	9	10	8
New Jersey	3	0	2	1
New Mexico	7	5	10	2
New York	2	2	3	1
North Carolina	0	6	0	6
North Dakota	0	0	0	0
Ohio	26	16	18	24
Oklahoma	0	0	0	0
Oregon	3	1	3	1
Pennsylvania	14	35	32	17
Rhode Island	0	0	0	0
South Carolina	1	0	1	0
South Dakota	0	0	0	0
Tennessee	0	0	0	0
Texas	2	2	4	0
Utah	0	0	0	0
Vermont	0	2	0	2
Virginia	1	2	0	3
Washington	0	2	2	0
West Virginia	3	7	1	9
Wisconsin	21	10	10	21
Wyoming	2	0	0	2
Total	188	188	181	195

Note: *Total appearances by Republican wives. **Total appearances by Democratic wives. †Total appearances by presidential candidates' wives. ‡Total appearances by vice presidential candidates' wives.

that in every no-visit blue state, Democrats lost ground relative to their margin of victory in 2000. While Republicans lost some ground in the western states, they increased their margin in the southern no-visit red states. But neither party was willing to waste precious time and resources by sending the surrogate wives to campaign in these one-party states.

Timing of the Visits

Both presidential campaigns strategically timed the visits of the surrogate candidate wives, especially during the final stretch of the campaign (after the third debate) when the number of appearances increased from 133 to 179 (see Figure 3). Three spouses made more visits after the third, and last, presidential debate than before the first presidential debate: Laura Bush (61 compared to 31 earlier), Lynne Cheney (41 to 27), and Elizabeth Edwards (47 to 44) (see Table 4). However, Teresa Heinz Kerry did not escalate appearances (30 to 31). It is apparent that with just three weeks to go, the Kerry-Edwards campaign saw little benefit in increasing the number of her appearances. The Bush-Cheney team, however, saw more appearances by Laura Bush as a real plus.

Appearances in Battleground States Escalated as Election Day Drew Near

Consistent with research on presidential candidate appearances, we found that in the last days of the campaign, the visits of the surrogate candidate wives were targeted to the most up-for-grabs states. Appearances in battleground states were stepped up after the third and final presidential debate (167 compared to 110 earlier) while those in non-battleground states declined (down from 23 to 12) (see Table 5). The rate of increase was dramatic for Laura Bush (27 to 57), Elizabeth Edwards (37 to 45), and Lynne Cheney (23 to 38), but nearly flat for Teresa Heinz Kerry (23 to 27).

Both presidential campaigns were quite strategic in deciding which battleground states candidates' wives would visit. Evidence affirms our hypothesis that in competitive states, a visit by one party's surrogate would be answered in short order by a visit from a surrogate of the opposition party. Furthermore, the frequency of appearances changed as a state's competitiveness changed. Some states, like Missouri and West Virginia, started out as competitive but quickly turned non-competitive, prompting a

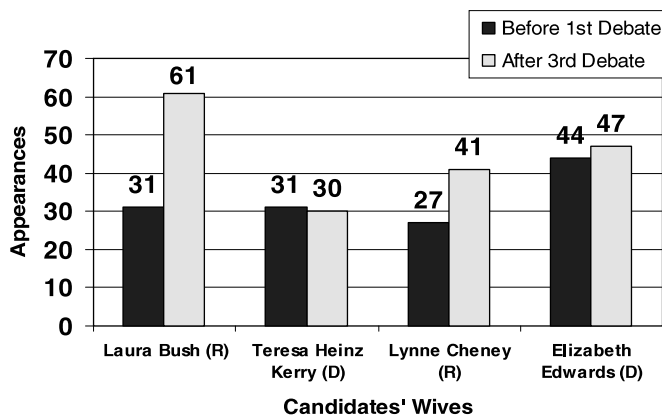
Table 3
States with No Visits by Candidates' Wives, 2004: "Safe States"

State	Electoral College Votes 2004	Presidential Vote 2000			Presidential Vote 2004			Margin of Victory Change 2000–2004
		Dem %	Rep %	Margin	Dem %	Rep %	Margin	
Alabama	9	41.6	56.5	14.9	36.8	62.5	25.7	10.8
Alaska	3	27.7	58.6	30.9	35.5	61.1	25.6	-5.3
Connecticut	7	55.9	38.4	17.5	54.3	43.9	10.4	-7.1
Delaware	3	55.0	41.9	13.1	53.3	45.8	7.5	-5.6
Idaho	4	27.6	67.2	39.6	30.3	68.4	38.1	-1.5
Kansas	6	37.2	58	20.8	36.6	62.0	25.4	4.6
Kentucky	8	41.4	56.5	15.1	39.7	59.5	19.8	4.7
Maryland	10	56.5	40.2	16.3	56.0	43.0	13.0	-3.3
Montana	3	33.4	58.4	25.0	38.6	59.1	20.5	-4.5
Nebraska	5	33.3	62.2	28.9	32.7	65.9	33.2	4.3
North Dakota	3	33.1	60.7	27.6	35.5	62.9	27.4	-0.2
Oklahoma	7	38.4	60.3	21.9	34.4	65.6	31.2	9.3
Rhode Island	4	61.0	31.9	29.1	59.4	38.7	20.7	-8.4
South Dakota	3	37.6	60.3	22.7	38.4	59.9	21.5	-1.2
Tennessee	11	47.3	51.1	3.8	42.5	56.8	14.3	10.5
Utah	5	26.3	66.8	40.5	26.0	71.5	45.5	5
Total	91							

Source: U.S. Census, *Statistical Abstract of the United States*.

Figure 3
Visits Escalated After the Last Presidential Debate

Number of Total Visits: Before and After Debates



Note: Only publicly announced or media-monitored events are included in this analysis.

Sources: Appearances data calculated from ABC News's "The Note," published from September 2 to November 2, 2004; George Washington University's Democracy in Action 2004 web page; and candidates' web sites.

curtailment of visits by each party's spouses. Other battleground states, like Iowa, Minnesota, Ohio, and Wisconsin, remained in contention throughout the campaign, resulting in repeat visits by the surrogates and often multiple appearances in a single day. An interesting pattern of visits was exhibited by Pennsylvania and New Hampshire where sur-

rogate's "responded" to each other's visits within two weeks. Proof that campaigns concentrate eleventh-hour visits in crucial battleground states can best be seen in the wives' visits to Florida and Ohio. Other states where surrogate appearances escalated toward the campaign's final days were Colorado, Michigan, and New Mexico.

As shown in Table 4, the vast majority of the wives' campaign appearances were

sole, with the exception of Lynne Cheney's. She almost always appeared jointly with her husband, Dick, mostly to improve perceptions of him. One explanation was to soften her husband's somber disposition. Yet another was to divert the press from covering just his area of expertise (defense policy) by having her speak of the arts and family. The joint appearance strategy was transparent but effective:

Mrs. Cheney, campaigning across the country for another four years as second lady, is downright warm. And she helps the vice president look a little warmer too . . . It all paints a portrait of high school sweethearts, together ever since. And strategists for both parties say it's a clear attempt to soften the image of a man who cuts a divisive and hard-edged public figure. (Dillon 2004)

Even more intriguing in the appearance format in the campaign's final stretch is the partisan difference (see Table 4). The Republican campaign scheduled more joint appearances for both Laura Bush and Lynne Cheney, while the Democratic campaign used both Teresa Heinz Kerry and Elizabeth Edwards as true surrogates. A higher proportion of the Heinz Kerry and Edwards appearances was solo, mostly in a different state than the candidates. Most striking was the shift in Laura Bush's appearance patterns. Prior to the first presidential debate she appeared solo in

Structure of the Appearances

The structure, or format, of the wives' visits can vary considerably—from solo appearances, either in a different state or in the same

Table 4
The Nature of Surrogate Appearances (Solo to Joint) Before the First Presidential Debate and After the Last Presidential Debate

Spouse	Total	Solo, Different State		Solo, Same State		Joint	
		#	%	#	%	#	%
Before 1st Presidential Debate							
Laura Bush (R)	31	24	77	0	0	7	23
Teresa Heinz Kerry (D)	31	28	90	3	10	0	0
Lynne Cheney (R)	27	1	4	0	0	26	96
Elizabeth Edwards (D)	44	44	100	0	0	0	0
Total	133	97	73	3	2	33	25
After 3rd Presidential Debate							
Laura Bush (R)	61	16	26	1	2	44	72
Teresa Heinz Kerry (D)	30	23	77	1	3	6	20
Lynne Cheney (R)	41	0	0	0	0	41	100
Elizabeth Edwards (D)	47	33	70	10	21	4	9
Total	179	72	40	12	7	95	53

Note: Only publicly announced or media-monitored events are included in this analysis.

Sources: Appearances data calculated from ABC News's "The Note," published from September 2 to November 2, 2004; George Washington University's Democracy in Action 2004 web page; and candidates' web sites.

a different state 77% of the time. After the final presidential debate she appeared jointly with her husband 72% of the time.

The Republican joint-appearance model reflects the more traditional image of first and second ladies as marriage partners, while the Democratic solo-

appearance pattern paints a picture of more independent wives whose partnerships with their husbands more closely resemble a co-presidency. As one columnist wrote of the contrast: "[Several of] the wives of the top-tier Democrats [are] outspoken women who are a far cry from the dutiful, smiling mannequin-variety of political spouses" (Baer 2004). The Republicans correctly predicted (and polls verified)⁷ that a sizable portion of the electorate favored a smiling Laura Bush standing adoringly next to her husband over the more independent-minded Teresa Heinz Kerry who did not seem to be as warm or comfortable in the role of the traditional first lady. In fact, a *Washington Post* post-election analysis by Howard Kurtz (2004) described her as someone "who often looked 'sullen,' was deemed a 'hypochondriac' by the staff and had a knack for 'silencing a cheering crowd.'" First Lady Laura Bush's demeanor was a bit sunnier, a difference easy for voters to see for themselves and one that Bush-Cheney strategists took advantage of in scheduling her appearances:

Poise. Grace. Good manners. Good looks. Those are the admiring comments that follow the presidential spouse on the campaign trail. This week brings her to five battleground states in three days. With polls suggesting that John Kerry is slowly eating away at Mr. Bush's lead,

Table 5
The Continuum of Surrogate Appearances from Solo to Joint in Battleground and Non-Battleground State

Spouse	Total	Battleground						Non-Battleground					
		Solo, Different State		Solo, Same State		Joint		Solo, Different State		Solo, Same State		Joint	
		#	%	#	%	#	%	#	%	#	%	#	%
Before 1st Presidential Debate													
L. Bush	27	20	74	0	0	7	26	4	4	100	0	0	0
T. H. Kerry	23	20	87	3	13	0	0	8	8	100	0	0	0
L. Cheney	23	0	0	0	0	23	100	4	1	25	0	0	3
E. Edwards	37	37	100	0	0	0	0	7	7	100	0	0	0
Total	110	77	70	3	3	30	27	23	20	87	0	0	3
After 3rd Presidential Debate													
L. Bush	57	15	26	0	0	42	74	4	1	25	1	25	2
T. H. Kerry	27	21	78	1	4	5	19	3	2	67	0	0	1
L. Cheney	38	0	0	0	0	38	100	3	0	0	0	0	3
E. Edwards	45	33	73	10	22	2	4	2	0	0	0	0	2
Total	167	69	41	11	7	87	52	12	3	25	1	8	8

Note: Only publicly announced or media-monitored events are included in this analysis.

Sources: Appearances data calculated from ABC News's "The Note," published from September 2 to November 2, 2004; George Washington University's Democracy in Action 2004 web page; and candidates' web sites.

Table 6
Type-of-Event Appearance Patterns for Each Spouse

	Laura Bush (R)	Teresa Heinz Kerry (D)	Lynne Cheney (R)	Elizabeth Edwards (D)	Total
Rally	86	36	41	41	204
Town hall meeting	0	1	21	35	57
Roundtable/Discussion	1	21	9	25	56
Fundraiser	11	5	4	2	22
Debate	3	3	4	3	13
Coffee/Community Leaders	1	6	3	2	12
Convention	1	3	0	0	4
Church	1	1	0	2	4
Home	1	0	0	2	3
Media	1	0	1	0	2
Funeral	0	1	0	0	1
Total	106	77	83	112	378

Note: Only publicly announced or media-monitored events are included in this analysis.

Sources: Appearances data calculated from ABC News's "The Note," published from September 2 to November 2, 2004; George Washington University's Democracy in Action 2004 web page; and candidates' web sites.

Republican party officials joke that she is their stealth weapon. (Goldenberg 2004)

Type of Event Attended

Of event types, the surrogate wives attended the rally the most in the last two months of the campaign. Over half of their appearances overall (204 of 376) were at these gatherings designed to maximize the number of potential voters they could reach. The next most popular venues were town hall meetings (15% of the appearances) and roundtables or discussion groups (15%). Laura Bush was sent almost exclusively to rallies or fundraisers (92% of her visits), compared to Teresa Heinz Kerry's 53%. In fact, Teresa Heinz Kerry appeared at a wider variety of events, particularly smaller ones, such as coffees and a town hall meeting. See Table 6.

Overall, the vice presidential spouses spent more time at town hall meetings and in roundtables/discussion groups. Their event appearance patterns were more evenly distributed across type of events and the difference between them narrower than for the presidential spouses. For example, 49% of Lynne Cheney's appearances were at rallies compared Elizabeth Edwards' 37%; for town hall meetings the breakdown was E. Edwards (31%) and L. Cheney (25%).

Type of Audience (General vs. Targeted)

Three-fourths of the total appearances by the wife surrogates (285 of 378) were before general rather than targeted audiences. The Republican spouses appeared

more often before general audiences than the Democratic spouses (85% and 66% respectively). The Democratic wives were much more likely to appear before specific slices of the electorate—namely, women, labor, racial/ethnic groups, and seniors—but different ones (see Table 7). Teresa Heinz Kerry was more often sent to address party activists, labor, African American, Hispanic, Native American, and victim groups (more liberal audiences), while Elizabeth Edwards more often interacted with college students, seniors, and military families (more independent and moderate audiences). In contrast, the Republican wives appeared before more general audiences, often at rallies they appeared jointly at with their husbands.

Announced Issue Focus of the Event

A relatively small proportion (20%) of the surrogates wives' appearances were at events with an issue focus. The most common were health care and Get-Out-The-Vote-related events. But again, we see differences by party. The Democratic spouses were more likely to appear at events with a specific issue focus than the Republican spouses (36% and 5% respectively). Of the issue-related events Laura Bush attended, education and the economy were the top two topics (see Table 8). For the two Democrats, it was health care and Get Out The Vote.

Table 7
Type of Audience (Announced) Targeted by Each Spouse

	Laura Bush (R)	Teresa Heinz Kerry (D)	Lynne Cheney (R)	Elizabeth Edwards (D)	Total
General	85	45	75	80	285
College Students	5	7	4	10	26
Political Party Activists	11	5	4	2	22
Women	2	4	0	5	11
Labor	0	5	0	4	9
Seniors	2	1	0	5	8
Military	0	0	0	6	6
African-American	0	5	0	0	5
Hispanic	0	2	0	0	2
Victim	0	2	0	0	2
Native American	0	1	0	0	1
NASCAR	1	0	0	0	1
Total	106	77	83	112	378

Note: Only publicly announced or media-monitored events are included in this analysis.

Sources: Appearances data calculated from ABC News's "The Note," published from September 2 to November 2, 2004; George Washington University's Democracy in Action 2004 web page; and candidates' web sites.

Table 8
Announced Focus of Events Attended by Candidates' Spouses

	Laura Bush (R)	Teresa Heinz Kerry (D)	Lynne Cheney (R)	Elizabeth Edwards (D)	Total
General	98	51	82	70	301
Health	1	16	0	19	36
Get-Out-The-Vote	1	7	1	7	16
Military/Security	0	1	0	8	9
Education	3	0	0	4	7
Economy/Job	3	0	0	3	6
Women Issue	0	1	0	1	2
Environment	0	1	0	0	1
Total	106	77	83	112	378

Note: Only publicly announced or media-monitored events are included in this analysis.

Sources: Appearances data calculated from ABC News's "The Note," published from September 2 to November 2, 2004; George Washington University's Democracy in Action 2004 web page; and candidates' web sites.

However, of all four wives, it was Edwards who was sent most often to issue-focused events—and to a wider variety (health, GOTV, military/security, education, and the economy/jobs). Since her husband's first run for office in 1998, Edwards had served as his chief policy spokesperson:

When Edwards ran for president, she sat in on early policy talks. "I couldn't stay quiet. If John happened not to be in the room, I might say, 'John doesn't believe that,'" she says. On some issues, such as education, "I might have a practical perspective" from years of volunteer work. (Lawrence 2004)

No One-Size-Fits-All Pattern to Appearances

It is clear that a great deal of thought went into the use of the presidential and vice presidential candidates' wives as surrogates in the 2004 campaign. Strategists, particularly those in charge of the surrogate campaign, were obviously reading the polls daily and reacting accordingly. Strategists were constantly adjusting the spouses' appearance schedules throughout the campaign. The tweaking got easier as the strategists became more knowledgeable about each spouse's strengths and weaknesses as campaigners. Marked party differences emerged about the preferred formats for the surrogates, the audiences they would address, and the issues they would discuss.

Conclusion

This first empirical analysis of wives as surrogate candidates on the presidential campaign trail clearly shows they were strategically used in the 2004 election. The findings provide solid evidence for at least four of our hypotheses: (1) campaigns will alter the appearance patterns—frequency, place, audience, type of event—of spouses as the campaign progresses; (2) spouses will be more likely to visit battleground than non-battleground states; (3) spouses will make more appearances closer to Election Day; and (4) one party's scheduling of spousal appearances will answer the opposition's spouses' appearances within a short time.

A fifth hypothesis, that spouses will make more solo than joint appearances with their husband candidates, was found generally true, but it differed by the stage of the campaign and the political party. Specifically, in the waning days of the 2004 campaign, Laura Bush and Lynne Cheney made more joint appearances than did their Democratic counterparts.

A sixth hypothesis, that spouses will make more solo appearances in the early part of the campaign and more joint appearances as the campaign winds down, was shown to be more true for one party—in this case, Republican, as mentioned above. Thus, the Bush-Cheney team chose to cast their candidate wives in a more traditional role (women as supporting cast), whereas the Kerry-Edwards campaign used Theresa Heinz Kerry and Elizabeth Edwards as more independent equals.

Surrogates do make a difference in campaign outcomes. Many anecdotally oriented, post-election analyses by major news outlets compared the "helpfulness" of these wives. Based on our analysis of their appearance patterns, we are not surprised that the best marks went to Laura Bush and Elizabeth Edwards. These surrogates made more appearances overall, more in battleground states, and more in the waning days of the campaign, especially in the handful of states that were still competitive. This did not happen by chance. The campaigns' greater reliance on Laura Bush and Elizabeth Edwards was based on their popularity and the breadth of their appeal across the partisan and gender divide.

In recent years, the selection of a vice presidential running mate has been said to hinge more on that person's ability to serve as a surrogate for the presidential nominee on the campaign trail than to give the ticket a geographical balance. Now it appears that the ability of their spouses to act as surrogates may be just as important a consideration, especially when the effectiveness of a vice presidential surrogate may be limited due either to personal attributes or political geography.

In the past, the term "surrogate" in a presidential election typically referred to the vice presidential candidates, Cabinet officials, and first ladies. As this research has shown, any future study of a surrogate campaign in a presidential election must examine the roles of the spouses of presidential—and vice presidential—candidates. It is evident, especially in this media age, that we must analyze how effectively the appearances of spouses are used to complement the candidates' visits to key electoral battleground states and the role spouses may play in candidates' successes or failures. This study provides a baseline for 2008 and beyond.

What to Watch for in 2008

As this research has demonstrated, it will be important to watch how the respective campaigns utilize the spouses of *both* the presidential and vice presidential candidates. It is already apparent from the primary campaign that the biographies of the spouses will play an integral role in how they are used to highlight specific issues and to reach very narrow, but critical, slices of the electorate. We can also expect that these spouses will be the object of much more media scrutiny than in the past, as their role in the campaign intensifies. A more ideologically-segmented press will most likely result in more negative media coverage of the candidates' spouses, in some cases cast in a "reality show" tone.

Notes

1. Extensive coverage of the potential 2008 presidential nominees' spouses began in early 2007. Examples of such articles were: "Bill Clinton Ponders a Role as First Gentleman" (Healy 2007); "Obama's Wife No Mere Coat Holder" (Associated Press 2007); "Elizabeth Edwards Charms the Queen City (Clayton 2007); "Exclusive: Cindy McCain's Straight Talk" (Rubin 2007); "[Janet Huckabee] Wife of the Preacher Man" (Campo-Flores 2007). This substantiates the growing role of spouses in media coverage of presidential campaigns and underscores the importance of having a strong surrogate campaign strategy.

2. As an example, an entire section of the Democrats' "Florida Victory 2004" handbook was labeled "surrogate strategy." The key constituency groups to be targeted by the surrogate campaign were women, seniors, African Americans, Hispanics, Jews, veterans, and youth

(Democratic Party 2004, 12). Likewise, for Florida Republicans, the campaign playbook pledged rallies with "high-level surrogates like the First Lady," especially for volunteer recruitment (Republican Party 2004).

3. As Burrell (2001, 112) notes, "The effect of the spouse on the campaign trail can be very broad in scope; she can attract crowds, generate positive press, help raise money, appeal to particular groups, and so on. This cannot be captured in a quantitative analysis. Quantitative analyses ignore the ability of a particular campaigner to stimulate workers, raise funds, motivate certain groups, or send get-out-the-vote messages."

4. Research by the Pew Research Center (2004) found that a larger percentage of Americans (59%) "regularly watched" local news media than either cable news (38%) or network news (34%).

5. Labor Day has long been viewed as time when voters start to pay more attention to the presidential campaign.

6. This web site makes a disclaimer about not being certain if there were more appearances by Theresa Heinz Kerry.

7. The headline for an article that appeared in the October 19, 2004, issue of USA Today read, "Public Favors a Traditional, Non-Working First Lady." It cited the results of a USA Today/MacNeil-Lehrer Productions/Gallup Poll showing that "public attitudes toward the appropriate roles for the wives of presidents and presidential candidates remain so traditional that spouses who stretch the boundaries risk rebuke at the polls" (Page 2004). The same poll showed that 54% say a candidate's spouse is an important factor in their decision about whom to support for president.

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