

ANALYSIS OF 2010 MID-TERM ELECTIONS: A CASE STUDY

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ANALYSIS OF 2010 MID-TERM ELECTIONS: A CASE STUDY

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## CHAPTER I

### INTRODUCTION

Article I of the United States Constitution establishes a Congress of the United States, consisting of a House of Representatives and a Senate. It was the intention of the framers of the Constitution that the House of Representatives be the body of the legislature that is closest to the People, with the entire membership of the body being chosen every two years. The upper chamber of the legislature, the Senate, was originally chosen by the various state legislatures, until the 17th amendment gave that power to the People of the states. One third of the membership of the Senate is up for election every second year.

This structure of electing representatives, both in the House and the Senate, has allowed the American voting public to use Congressional elections as a way to voice their opinion to the way leaders manage issues in Washington. Mid-term elections, especially, are seen as a barometer of public opinion toward the job performance of the president. An increase in the number of seats held by the party of the president is an indicator that the electorate largely approves of the president's job performance. While the party of the president in power generally loses seats in mid-term elections, large losses can be interpreted as public disapproval toward the president's agenda.

The twentieth century had several mid-term elections which saw dramatic losses for the party of the incumbent president. In the middle of President Franklin D. Roosevelt's second term, the Democrats lost 72 House seats to the Republicans. Several explanations have been given as to why the Democrats lost so many seats that year, including the recession of 1937 and Roosevelt's attempt at packing the Supreme Court. The recession of the previous year caused the public to question the success of the New Deal policies of the Roosevelt Administration and his New Deal coalition in Congress (Busch, 2006, May).

As World War II concluded shortly after the death of Roosevelt, President Harry S Truman was charged with the monumental task of not only helping to secure the peace in Europe, but re-incorporating millions of returning servicemen into American society. Though he was not elected president, the 1946 elections were seen as a mid-term referendum on his performance. By the time the election was held, Truman was a deeply unpopular president, partly due to a perceived mishandling of labor disputes. Republicans were able to gain control of the House of Representatives for the first time in 14 years, as Democrats lost 54 seats to the Republicans (Leuchtenburg, 2006). The Republican majority would be short-lived, as Democrats gained control of the chamber again two years later, when Truman was surprisingly elected to a full term.

The 1958 elections, held in the middle of President Eisenhower's second term, were held during a downturn in the economy. This was also a time when American angst over communism grew to new heights when the Soviets successfully launched the first satellite, Sputnik, into space. The public questioned the continued ability of the President

to lead, and consequently, the Republicans lost 48 seats in the House, bringing the margin of Democratic control in the chamber to an astounding 130 seats (Busch, 2006, July).

The mid-term elections of 1966 were held during an especially turbulent point in American history. American discontent over the Vietnam War and the occurrence of several race riots across the country hurt the popularity of President Johnson, and through him, the Democratic Party (Cook, 2010). Republicans were able to put a dent into the massive majorities the Democrats had built up in the 1964 elections, winning 48 seats, to bring their total representation to 187 seats as compared to the Democrats' 248 (Frail, 2010).

Republicans had an especially rough year in 1974. President Richard Nixon resigned in the wake of the Watergate affair, which left Americans highly distrusting of government, and the Republican Party. Shortly after succeeding him as president, Gerald Ford pardoned Nixon from any possible charges stemming from the Watergate scandal. This was politically unpopular, and seemed to only add to the electoral problems Republicans were facing that fall. Democrats were able to add 48 seats to their majority in the House, and 4 seats in the Senate (Abramowitz, Cover, & Norpoth, 1986). The Democratic victories gave Democrats a two-thirds majority in the House.

In 1994, after 40 years as the minority party in the House of Representatives, Republicans saw their opportunity to gain control of the lower chamber. In what is widely known as the "Republican Revolution," Minority Whip Newt Gingrich was able to engineer a Republican take-over of the House that included the defeat of the incumbent Speaker of the House, the first time such an event had occurred since 1862. Running on

a “Contract with America” that promised several popular pieces of legislation to be voted on in the first 100 days of the new Congress, Republicans were able to gain 54 seats in the House. In the Senate, Republicans also gained eight seats, making them the majority party in that chamber, as well (Nagourney & Connelly, 2010).

Republicans were able to maintain their majority in the House for the next 12 years. The Senate briefly saw a Democratic majority in 2001, following Vermont Senator Jim Jeffords’ decision to leave the Republican Party and become an independent. In 2006, President George W. Bush was in the middle of his second term and was deeply wounded politically. The Iraq War was in its third year and had grown increasingly unpopular among the American public. The federal response to the aftermath of Hurricane Katrina left Americans questioning the ability of the federal government to meet the needs of the people. Republicans in Congress were also caught up in the Abramoff lobbying scandal, and the Republican leader in the House resigned following an indictment on charges of violating campaign finance laws. Democrats seized on these Republican blunders by labeling pushing the message that Republicans lived in a “culture of corruption.” Voters responded to this message, and sent a clear signal that they were ready for change in Washington. Democrats were able to take back control of both chambers of Congress, winning 30 seats in the House and six in the Senate (CNN Politics, 2006).

All of these mid-term elections saw large losses for the party of the incumbent president. In all of these cases, historical events contributed in the creation of a political environment which was toxic to the party of the president. In some cases, a disruption in the economy led Americans to seek a balancing of power in the nation’s capital, in other

cases, voters were seeking to punish the president for a perceived failure in leadership, or the pursuit of an unpopular agenda. Some elections saw both of these reasons contribute to electoral defeats for the president's party.

This thesis will examine the factors behind the Republican wave of 2010, which resulted in the president's party losing 63 seats in the House of Representatives and six seats in the Senate. To accomplish this, a literature review of the scholarly work published on congressional campaigns will be utilized in order to show that there are four major themes that exist in every election cycle: strategic retirements, party identification, issues, and campaign intensity and effectiveness. These four themes were prevalent in the 2010 mid-term elections, and all contributed to the Republican gains of that year.

Following the literature review will be an analysis of the campaigns and voting results of the 2010 election cycle. The analysis will include an examination of how the four themes played a role in the Republican victories, as well as how the Tea Party played a major role in galvanizing a voter enthusiasm gap between the Republican and Democratic parties, resulting in a larger turnout of Republican voters at the polls than Democrats.

Finally, an analysis of a specific congressional race will be used to illustrate, at a micro level, how these themes played a role in these elections. While the dynamics of every congressional race are different, the contest between Democrat Rep. Chet Edwards and Republican Bill Flores is largely representative of the characteristics of the 2010 election cycle. This race resulted in the defeat of a moderate Democratic incumbent in a year that was anti-incumbent and anti-Democratic.

While it was expected that the Democratic Party would lose some seats in Congress in the middle of President Obama's term, especially following the Democratic waves of 2006 and 2008, no one could have predicted the magnitude of the Republican victory much before 2010. However, the passage of the health care reform bill, the proposed cap and trade bill, the massive federal deficit and national debt, and the exposure of the Democratic majorities in both chambers of Congress created a perfect storm that led to the Republican wave that swept the country in November 2010.

## CHAPTER II

### LITERATURE REVIEW

The Federal elections that were held in November 2010 were widely considered to be a referendum on the policies of the administration of Barack Obama who was inaugurated 22 months before. The history of mid-term elections dictates that the party of the incumbent president will lose seats in the United States Congress, but the losses the Democratic Party experienced in 2010 were at a level of such dramatic proportions that it deserves further analysis among members of the political science community. The large majorities the Democratic Party built in the Federal elections of 2006 and 2008 evaporated, handing control of the House of Representatives to the Republicans for the first time in four years, and greatly reducing the margin of control the Democrats had in the Senate.

The 2010 mid-term elections revealed the importance of not only political messaging and campaign strategy, but also how mid-term elections are closely tied to the public opinion regarding the performance of the president, acting in a way as a referendum on the policies of the Executive branch of the government. The literature discussing congressional elections approaches the subject from a myriad of directions, revealing the complex nature of this democratic institution. As this literature review will show, there is little consensus in the scholarly community in regard to the subject of

congressional elections. There is no one single theme that is revealed by the scholarly literature on this subject. Rather, the literature discussed in this review show the many different themes upon which authors narrow their focus, each playing an important part in congressional elections.

Reviewing the literature written on congressional elections, a few themes appear consistently throughout the scholarly material. First and foremost, a fascinating discussion among scholars in the political science community has developed regarding the relevance of campaigns in general terms. There is disagreement regarding whether or not campaigns are useful in the polarized environment of American politics. While some believe that campaigns are vital in the effort to sway the ever-increasing bloc of voters known as independents, others seem to believe that elections are largely decided before votes are even cast due to the overwhelming advantage that incumbents hold in their races for re-election.

Second, party identification is a prevalent theme throughout the literature. Association with a specific party has become part of voter's overall personal identity in much as religiosity and they vote accordingly. As a result, candidates will often base their campaign strategy on the successful attempt to secure voters who identify themselves with a specific party.

Third, issues play a very important role in congressional elections, especially in cycles that see a large amount of turnover in the partisan makeup of the membership. The 2010 congressional elections revealed just how much of an impact issues can have

on the outcome of a specific election cycle. Hot button issues such as health care reform, cap and trade, and deficit spending dominated the narrative of the entire election cycle.

This literature review is meant to highlight the importance of these themes in the context of analyzing the 2010 congressional elections, which will be presented in the following chapter. It is significant that the themes of campaign effectiveness and intensity, party identification, and issue voting are prevalent in the scholarly material written on congressional elections, and should be used as the foundation for any scholarly analysis of a particular campaign cycle. The topics presented in this literature review encapsulate the most vital parts of the election process and the scholarly opinion regarding them.

### **Campaign Effectiveness and Intensity**

The 2006 book *Capturing Campaign Effects*, edited by Henry E. Brady and Richard Johnston, lays the foundation for understanding the purpose and relevance of campaigns in the modern political context. Recognizing the polarized state of American politics and the fact that the most in-tune, or likely, voters have made their choice months before a general election, Brady seeks to identify the purpose of a campaign in very generic terms. At the very least, a campaign is the time before voters make a political decision. During this time, the intensity with which the American public's focus is on politics is greatly increased. The amount of attention paid by the public to campaigns is directly related to the propinquity of an election (Brady & Johnston, 2006).

Another measurement of intensity is the amount of effort put forth by candidates and their respective political parties, which gradually increases throughout the duration of

the campaign. The effort can be characterized through periodic spurts of television advertising or alternating the amount of effort put forth in the campaign, which to some voters makes the effort look more intense. Voters who follow a campaign closely would be able to notice the different fluctuations in campaign activity (Brady & Johnston, 2006).

The last indicator of intensity is the amount of focus the media pays to the campaign. Without media attention, a campaign can die with little notice. Since the media focuses on stories that are able to attract viewers and readers, a campaign that garners media coverage is usually quite intense and competitive. Concomitantly with party participation, an increase in media coverage generally occurs close to the time of the general election. When this does occur, the focus of the media is generally on the dynamics of the choice facing voters, and not on the voters themselves (Brady & Johnston, 2006).

Even with these indicators, the prevailing scholarly opinion, according to Brady and Johnston, is that campaigns have minimal effects. This is known as the minimal effects theory. Brady and Johnston (2006) continue, “Minimal effects mean in essence minimal persuasion. Because of the existing information and prejudices that voters possess, campaigns rarely change their minds” (p. 4). Supporting their claim, Brady and Johnston (2006) point to the 1940 presidential election where over half of the voters had settled on their preferred candidate by June, with only eight percent shifting their allegiance to another candidate throughout the campaign. While campaigns may have little influence over changing the minds of voters, they do serve the purpose of shoring up

the base. In essence, campaigns effectively reinforce the decisions of partisan voters, reassuring them that their preferred candidate is the right choice.

Campaigns can also serve the purpose of “activating” preferences. A significant amount of voters who, at the beginning of the campaign were undecided, ended up choosing a candidate who most closely reflected their sociological predilections. Brady and Johnston (2006) cite a study which explained this phenomenon in that “campaigns identify for the voter ‘a way of thinking and acting which he is already half-aware of wanting’” (p. 5).

For decades, the minimal effects theory was the prevailing consensus among political scientists. However, it became clear that the dynamics of a congressional campaign were much different than those of a presidential campaign. For example, Gary C. Jacobson’s 1983 work on congressional campaigns revealed the influence candidate spending had on election results. Jacobson states that as the candidate exerts more effort throughout the campaign, the more cash the campaign expends. The increase in spending comes as more advertising is bought and distributed, as well as other expenses that accrue due to the day to day operations of the campaign working to get the candidate elected (Jacobson, 1983).

In light of the minimal effects theory, the hypothesis that Brady and Johnston explore is that political campaigns matter. In order to do this, they attempt to answer whether or not campaigns persuade voters, prime certain issues or considerations, shape strategic considerations, and stimulate voter interest and turnout. By using both panel studies and rolling cross-sections, the authors are able to discern how “people’s ideas and

intentions change in the weeks and months preceding an election” (Brady & Johnston, 2006, p. 18).

Working to measure the effects of campaign spending in U.S. House elections, Gary C. Jacobson first mentions a basic fact about congressional campaigns. Analyzing National Election Studies (NES), Jacobson notes that every NES conducted since 1958, the first year of the study, has “confirmed that simple knowledge of the candidates’ names is both far from universal among voters and strongly associated with the vote choice” (Jacobson, 2006, p. 199). In other words, voters tend to gravitate toward candidates whose names they recognize. Campaign advertising, according to Jacobson, is the best way for candidates to get their name recognized among the voters, and this is only realized when political campaigns expend funds on this type of media. Recognizing the dispute among scholars about how campaign advertising influences election results, Jacobson also notes that there is little disagreement that campaign spending effects the results in an important way.

Campaign spending, as mentioned before, is an important measure of campaign effort. It is important, however, not to measure campaign spending with undue accuracy. Put another way, an increase in a certain amount of dollars spent will not guarantee a certain increase in votes received. Kept in more general terms, however, an analysis of the effects of campaign spending will be concurrent with analysis of the effects of campaign effort (Jacobson, 2006). Using this understanding as a foundation for further research, Jacobson first focuses on whose campaign spending matters. Benefiting from the disclosure provisions of the Federal Election Campaign Act of 1971, Jacobson (2006) discovers a surprising importance on the incumbency status of a candidate.

The correlation between money spent and votes received differed greatly between incumbents and challengers. The more a challenger spent, the better they did on Election Day; the more an incumbent spent, the worse they did. This obviously does not mean that incumbents lose votes with every dollar they spend. The consensus among political scientists is that when incumbents spend more money, it generally means that they are facing a considerable election threat, and so they must spend more money to stave off a challenger (Jacobson, 2006).

Following this logic, campaign spending seems to be a predictor of success. For challengers, campaign donors are more willing to invest in campaigns that show greater possibilities of success. So the more money a challenger brings in, the better their chances are of winning an election. Working in the opposite manner, the less money an incumbent brings in, the greater their likelihood of success. If it is a foregone conclusion that an incumbent is going to win an election, it is not paramount for that candidate to raise considerable amounts of money for the campaign (Jacobson, 2006).

Another measure of the effectiveness of campaigns is the flow of information. Focusing on the flow of information in congressional campaigns, Laurel Elms and Paul M. Sniderman focus on the purpose of campaigning and its effects on voter recall of candidates. More specifically, the authors analyze at what point during the course of a campaign information must be acquired by voters in order for it to have its intended effects. For Elms and Sniderman, it is of vital importance to establish exactly “when in the course of the campaign citizens learned whatever they wound up learning about the candidates” (Elms & Sniderman, 2006, p. 221-222). According to the authors, since the amount of information voters know about a candidate is correlated to the length of time

they have known of them, it is necessary to discover both the knowledge voters have about candidates and when they acquired that knowledge.

The authors employed the 1994 Missouri Election Study for their research, as it was the first election survey that used daily random samples of voters to gauge campaign intensity, while all other election surveys, specifically the NES, only surveyed voters after the campaign was over. The Missouri Election Study included all of Missouri's nine congressional districts, which all had varying degrees of campaign intensity. Although none of the challengers in the study won their respective elections, some of them were close, as would be expected in a year of political realignment.

At first, the ability to recall who was running in an election was an indicator of awareness of candidates. However, as Thomas E. Mann and Raymond E. Wolfinger pointed out in their 1980 article "Candidates and Parties in Congressional Elections," many citizens who were unable to recall the names of candidates on the ballot were still able to recognize them. Therefore, "recall is a more demanding test than recognition, though both are tests of knowledge" (Elms & Sniderman, 2006, p. 223). Recall and recognition are not indicators of success, however. Just because a citizen is able to remember the name of a candidate does not mean they will vote for them.

Using what they already know about recognition and recall, Elms and Sniderman "consider other types of candidate familiarity and the differences in the levels of these types of awareness during the campaign" (2006, p. 223). The authors' study maps voters' changes in the level of knowledge they have of incumbents and challengers throughout the span of congressional campaigns. The authors are able to determine how

much of an “educational role” campaigns undertake by testing different varieties of knowledge about candidates. Additionally, Elms and Sniderman analyze this role further through the “effort and ability of the candidates to inform citizens about their electoral choices” (2006, p. 223).

The biggest obstacle that challengers must overcome is name recognition. It is important for challengers to use their campaigns as a means of saturating the voting public with their name, so that citizens may, at the very least, recall their names by the time Election Day arrives. Using the Missouri study, Elms and Sniderman mapped the ability to recall and rate both strong and weak challengers throughout the 64 days leading up to Election Day. The difference between strong and weak challengers is dramatic. While weak challengers are able to make gains in the level of name recognition among the voting public, only about one in five voters can recognize them by Election Day. Strong challengers, on the other hand, make steady gains throughout the course of the campaign, reaching near complete name recognition by Election Day, or eight out every ten respondents. Using these statistics, the authors argue that for the cause of boosting name recognition, campaigns matter (Elms & Sniderman, 2006).

Incumbents, however, enjoy nearly universal name recognition from the outset of a campaign. If there is an increase in name recognition, it is only minimal. Noting this “ceiling effect” of incumbent name recognition, some analysts have come to the conclusion that if an incumbent finds any sort of advantage from a campaign, informational gains are not one of them (Elms & Sniderman, 2006). Elms and Sniderman, however, come to the conclusion that incumbents do find use in campaigning, specifically in boosting what voters know about them. This requires effort

on the part of the incumbent, so this usually happens when there is a specific need to do so.

### **Party Identification**

Gary C. Jacobson takes an in-depth look at congressional voters in his 2001 book *The Politics of Congressional Elections*. Jacobson notes in the introduction of his narrative that while the understanding of congressional voters is critical for both political scientists and political candidates, their voting behavior is continuously changing, making it difficult to develop a concrete profile of this segment of the population. However, with each passing election, new data are gathered, allowing political scientists to understand congressional voters in a better way than they did decades ago (Jacobson, 2001, p. 101).

Jacobson notes that turnout for congressional elections is typically low. While this has been the trend for mid-term elections for several years, only recently has this also been the case for elections held during a presidential election cycle. Jacobson notes that there is a 13 percentage point drop in voter participation in congressional elections cycles where the presidency is not on the ballot. Even when the presidency is on the ballot, voting for the House of Representatives is four percentage points lower than participation in the presidential election (2001, p. 101).

The demographics of those participating in congressional elections are usually consistent with each cycle. According to Jacobson, “better educated, wealthier, higher-status, and older people are clearly over-represented in the electorate” (2001, p. 103). The reason for this, according to Jacobson, is that higher-educated people have a greater ability to comprehend the complex issues that surround the political environment, and are

more willing to involve themselves in the political process. The result of this imbalance is that politicians shape their agendas to this voting demographic, paying less attention to the issues that face the less-educated and the poor (Jacobson, 2001, p.103).

Party identification also plays a significant role in the defining of congressional voters. Jacobson describes that party identification among voters is much the same as identifying with a religious or ethnic group. The author explains, “The psychological attachment to a party was rooted in powerful personal experiences (best exemplified by the millions who became Democrats during the Depression) or was learned, along with similar attachments, from the family” (105). Consequently, party identification remains pretty consistent in its distribution among the electorate. This does not mean that the same party will win every election. Many voters do not identify with a single party, and among those who do, will “defect if their reactions to particular candidates, issues, or recent events ran contrary to their party identification strongly enough” (105). Interestingly, Jacobson clarifies that once the short-term influences that force a diversion from their normal party-identification are no longer present, these voters quickly return to their normal voting behavior. Concluding, Jacobson states that “only quite powerful and unusual experiences could inspire permanent shifts of party allegiance” (105).

From 1956-1998, the number of partisan voters participating in congressional elections has remained fairly consistent, though they are at levels lower than their peak in the 1950s. This does not mean that more partisan voters became independents. On the contrary, the number of voters who identify themselves as independent did not grow during this time. The growth was seen in the defection of voters from their party. The benefactors of these defections differed between the races for the House and Senate.

Challengers in House elections generally benefited more from these defectors, while the incumbents in Senate races gained the votes of these defectors (Jacobson, 2001, p.109).

In their article “Voters, Candidates, and Issues in Congressional Elections,” found in Lawrence C. Dodd and Bruce I. Oppenheimer’s book *Congress Reconsidered*, Robert S. Erikson and Gerald C. Wright (2009) also address the partisan identification of voters for congressional elections, more specifically the House of Representatives. In their discussion of the partisan breakdown of the electorate, the authors introduce the term “macropartisanship,” which they define as being the national division of party identification (73). While macropartisanship generally remains stable, small changes occasionally occur, which “imply small changes in the electorate’s collective standing decision” (73). These changes in partisanship are generally reflective of the electorate’s evaluation of the major parties’ “relative competence in governing,” which can affect the outcome of elections (73).

In order to further explain macropartisanship, Erikson and Wright point to the 40 year period of constant Democratic control of the House of Representatives during the twentieth century. Since Democrats had a massive advantage in party identification during this time, there were more voters who voted Democratic than Republican. During the 1980s and into the early 1990s, the Democrats lost their advantage in party identification, ultimately resulting in their loss of control in the House of Representatives in 1994.

Addressing partisan voting activity during mid-term elections, Erikson and Wright (2009) present two leading explanations for the trend of the presidential party

losing seats during these elections. The first theory is known as “withdrawn coattails,” explained as the over-inflation of votes received by the party of the winner of the presidential election during years in which the presidency is on the ballot. When congressional elections are held two years later, “the congressional vote reverts to its ‘normal vote’ outcome, resulting in an electoral decline for the president’s party” (76). Supporting this theory is the trend of the presidential party losing seats in the 14 mid-term elections held from 1946 through 1998. The authors also address the fact that the Democrats gained seats in the 1998 election by noting the lack of coattails provided by President Clinton in 1996. Therefore, since there were “no coattails to be withdrawn in 1998, the Democratic congressional vote did not decline” (76-77).

The second theory the authors present is known as “ideological balancing.” This occurs when political moderates, who do not identify with either party, want to provide a balance of ideology in Washington. In other words, moderates would rather not have any single party directing the priorities of the executive and legislative branches of government. Supporting this theory is the fact that during the 16 mid-term elections held from 1936 to 2006, which had an equal number of Republican and Democratic presidencies, “each party won about twenty-one more House seats when it did *not* control the presidency” (Erikson & Wright, 2009, p. 77). It would therefore seem that the party out of power had the greatest amount of seat takeovers in Congress when they lost the presidential election two years earlier.

In the overview of *Campaigns and Elections: Contemporary Case Studies*, a book co-edited by Michael A. Bailey, Ronald A. Faucheux, Paul S. Herrnson, and Clyde Wilcox, the editors address the importance of party identification in congressional

elections. Here, the editors affirm the notion presented earlier that voters most often vote based on their affiliation to a specific party. In the 1996 elections for example, “87 percent of strong Democratic partisans voted for Democratic House candidates and 98 percent of strong Republican partisans voted for Republicans” (12). In an effort to explain this phenomenon, the editors support the theory that partisanship is part of a person’s identity, and that voters use their party loyalty as “a cue for assessments about what is good and what is bad in politics” (12). Party loyalty for an individual generally remains constant, so party identification is a reliable predictor as to how a specific person will vote.

The editors also are sure to note that while party identification is crucial to many voters, the overall amount of voters who identify with a specific party has declined. In 1952, for instance, almost three-fourths of all Americans identified themselves as either strong or weak supporters of one of the two major parties. By 1998, that number had shrunk to 66 percent, with the number of voters identifying themselves as independents reaching 26 percent (Bailey, Faucheux, Herrnson, & Wilcox, 2000, p. 13). The reason for this reduction in partisans is based on several factors including improved education, suburbanization, and reduced immigration. In addition, “the introduction of new issues that cut across each party’s original core policy positions left many voters feeling that their party had abandoned their concerns” (Bailey, Faucheux, Herrnson, & Wilcox, 2000, p. 12). Lower party identification is also tied to the extinction of “old-fashioned political machines,” which served as the connection between voters in a specific area to politics. These political machines have been replaced by more modern campaigns that rely heavily on money and media.

During presidential election years, another phenomenon of party identification appears, especially among independent voters. Many voters will intentionally split their votes between the two political parties. In other words, if a voter supported the Democratic candidate for the presidency, they may decide to then support the Republican candidate in their local House or Senate elections, so as to not give any one party complete control over both elected branches of government. Interestingly enough, Republican candidates capitalized on this phenomenon in the 1996 elections, running campaign ads that urged voters to keep President Clinton in-check by re-electing a Republican Congress (Bailey, Faucheux, Herrnson, & Wilcox, 2000, p. 14).

Clearly, the literature presented reveals the importance of party identification in congressional elections. For many voters, party identification shapes their views on specific issues and candidates, and serves as their guide to voting. Still for many other voters, party identification is of little significance, as proven by the growing number of independent voters among the electorate.

## **Issues**

In his book *Congressional Elections: Campaigning at Home and in Washington*, Paul S. Herrnson addresses how candidates use issues as a focus of their campaigning within their district. Citing the 1998 Congressional Campaign Study, Herrnson notes that about 56 percent of all congressional campaigns use issues as the basis of their messaging, while about 24 percent, mostly incumbents, focus on the candidate's image (2000, p. 194). Herrnson explains that most candidates focus on "valence" issues, which are generic policy stands on the economy, job creation, and other issues that are generally

viewed favorably. Candidates usually ignore “positional” issues, which force a candidate to take a specific stand regarding a certain policy. Congressional challengers usually benefit the most from campaigns focused on positional issues, as they are able to use the congressional voting record of the incumbent against them, and use that record as a means of drawing distinctions between their stances on the issues. Herrnson continues his explanation by stating that “candidates who campaign on positional issues hope to attract the support of single-issue or ideological voters or to overcome some weakness in their image” (2000, p. 195).

Erikson and Wright (2009) also discuss how the nation’s policy mood can direct voters’ long-term voting behavior. According to the authors, the outcome of congressional elections is reflective of the electorate’s preference toward either more conservative or liberal policies. Erikson and Wright reference the work of James Stimson, who developed an annual report of the nation’s ideological mood based on his compilation of various public opinion polls. Through analysis of Stimson’s work, the conclusion is able to be drawn that the outcome of congressional elections is “significantly related” to the nation’s ideological mood (p. 75). Focusing their conclusion in a narrower way, Erikson and Wright state that when the nation is preferable to more government activism, they tend to vote Democratic. Again citing Stimson’s research, the nation’s most liberal mood came during the early 1960s, which was a time of Democratic dominance in the House of Representatives. Concomitantly, the Republicans enjoyed a period of considerable strength during the early 1980s, reflecting the electorate’s more conservative mood. The pendulum swung the other way again in

2006, giving Democrats control of the House, when dissatisfaction with the Bush Administration resulted in a more liberal policy mood (p. 75).

In their essay “Issue Voting in the 2006 Elections for the U.S. House of Representatives,” included in the Dodd and Openheimer edited book *Congress Reconsidered*, Paul S. Herrnson and James M. Curry discuss how national and local issues shape congressional campaigns. Noting that most congressional campaigns are focused on local issues, the authors also quickly point out that national issues are sometimes at the forefront of voters’ minds when they step into the polling booth. For instance, the matters regarding national security in 2002 and 2004 shaped the congressional election campaigns of those years, especially seen in the use of the military campaigns in the Middle East as a campaign narrative by candidates affiliated with the Republican Party. The relatively high popularity of President George W. Bush and the War on Terror during this time resulted in electoral success for Republican candidates. National issues were again a focus during the 2006 mid-term elections; the difference was that the popularity of the Bush Administration was at historic lows and the Democrats were able to shape the narrative of the election around the struggling military campaign in the Middle East and the perceived government corruption at the Federal level, resulting in their gain of 31 seats in that election. When national issues are the prominent focus of congressional issues, candidates will focus their campaign narratives toward the issues that will benefit them the most. This is especially true if they hold positions that are relatively popular with voters of their district or that are contrary to an unpopular incumbent or the party of an unpopular president. Candidates with that problem usually try to focus their campaigns on local issues (2009, p. 100).

The authors note that while few voters actually “possess a high level of political awareness, and even fewer are believed to systematically compare candidate positions on the issues with their own policy preferences” (Herrnson & Curry, 2009, p. 102), issues can still be a major component of congressional elections. Herrnson and Curry argue that a campaign strongly focused on issues can increase turnout among voters of a candidate’s base of support, along with attracting voters who do not identify with either major political party, and sometimes cause voters of the other party to cross-over and vote for them. Historically, domestic issues tend to be the dominant focus of campaign messaging and the most important for voters who intend to vote in a congressional election (2009, p. 102).

The process of issue voting is explored by Dona-Gene Mitchell in her chapter “Perceptions and Realities of Issue Voting” written for the 2009 book *Fault Lines*. Mitchell explains that while most voters like to consider themselves issue voters, the reality is that choosing a candidate who is closest to a voter’s stance on specific issues takes more cognitive power than most voters are willing to expend. Instead, Mitchell explains, voters most often will shape their stances on issues based on the stances of the candidate they most prefer. Voter preference is most often determined by “other considerations such as partisanship, personality, or character” (p. 114). Basing their issue stances on these other considerations takes much less cognitive reasoning, therefore making it easier to assume that the candidate they support shares their basic views, whether the candidate in reality does or not.

Mitchell (2009) also brings up a point that remains a topic of debate among political scientists. While most agree that “issues matter for electoral decision making”

(p. 116), there is less consensus regarding just exactly how issues influence voters. Additionally, it is unclear how important issues are to voters as they decide for whom to vote. Using data collected from the 2006 House elections, Mitchell found that issues played a critical role in formulating a vote choice. For instance, “83.1 percent of respondents considered the candidate’s issue positions important to their vote decision” (p. 116). The data Mitchell reviewed showed that the majority of voters based their votes on not only the issue stances of the candidates, but also their voting record, if one existed. So while it is unknown *how* issue information is processed by voters, the conclusion can be drawn that issue information is used by voters when formulating a vote choice.

Mitchell’s research revealed that voters in the 2006 House elections did not, in reality, practice classical issue voting, in which a voter evaluates which candidate’s positions are closest to their own. Instead, voters largely inferred what a candidate’s positions would be based on the candidate’s party affiliation. Even when presented with information regarding a specific candidate’s stances, voters did not use that information when drawing their conclusions regarding the candidate’s stances on issues (p. 124).

The editors of *Campaigns and Elections* attempt to explain why issues do not play a larger role in congressional elections. While many believe that having campaigns focused on issues would be positive for the democratic process, very seldom does this actually occur. One reason that the editors give for this is the fact that many candidates hold the same stance on issues, particularly in district-centered campaigns. For instance, “candidates from rural areas, regardless of their party, support agricultural programs, and candidates from conservative districts usually favor a balanced budget” (Bailey, Faucheux, Herrnson, & Wilcox, 2000, p. 2). Any candidate taking a stance against the

consensus of the district would never be viable, therefore resulting in the candidates agreeing on the issues.

Campaigns also tend to focus on local issues rather than national issues. While national news outlets tend to focus on the major current events, the fact of the matter is that voters pay little attention to them, focusing instead on the issues that directly impact their everyday life. Another reason that voters tend to pay little attention to national issues is because the chance of their representative in Congress having any impact on the national decision making is very small. Instead, voters look to their representatives for more “tangible benefits” for their district, especially federal funding for a project that could bring jobs to their area (Bailey, Faucheux, Herrnson, & Wilcox, 2000, p. 3).

Former Speaker Tip O’Neill’s aphorism “All politics is local” would seem to hold true for most congressional election cycles. In years where the election is more district-centered, local issues dominate the campaign narrative. In those sporadic cycles where there is a political wave, national issues tend to dominate the campaign messaging.

### **Strategic Retirements and Entries**

While there has been considerable attention paid to the strategic decisions made by political campaigns, the strategic decisions of the candidates themselves is also mentioned in literature. Gary Jacobson and Samuel Kernell’s groundbreaking 1981 work *Strategy and Choice in Congressional Elections* analyzes the decisions that House incumbents must face in determining whether to run for re-election, seek higher office, or retire. While the decision to retire may not necessarily always be a strategic move, it sometimes is. Jacobson and Kernell investigate the motives behind each of these choices.

Every two years, all sitting Representatives must make the decision to run for re-election. Some incumbents look at the current political environment and decide to opt for retirement, rather to wage another campaign for Congress. Jacobson and Kernell explain that as Representatives gain more seniority, they become more uneasy about the decision to run for re-election. While on the one hand their chances of winning are very good, a hostile political environment towards their party makes retirement an attractive option. Retiring and avoiding an electoral defeat leaves the door open for a run for higher office later (Jacobson & Kernell, 1981, p. 25).

Political intuition on the part of incumbents also plays a major factor in their decision to run for re-election. Jacobson and Kernell's research revealed that significant numbers of incumbents will try and "read the tea leaves" months before an election is to take place. Using the mid-term elections of 1946 as an example, several newspaper articles in January of that year were reporting that the electoral outlook for Republicans was the best it had been in years, due to voter dissatisfaction with the way President Truman and the Democratic Congress were readjusting the economy from wartime to peacetime.

Another indicator is public opinion polls, like the generic congressional ballot poll conducted by Gallup. Pointing to the mid-term elections of 1954 as an example, Jacobson and Kernell noted that the huge Democratic victories of that year were preceded by a "shift in the percentage of respondents favoring a Democratic congressional victory from 47 percent in July 1953 to 52 percent in February 1954." Similarly, a rise in Democratic support from 52 percent in an October 1957 poll to 56 percent in February 1958 also foreshadowed the big Democratic gains in 1958 (1981, p. 28).

Candidate recruitment is the final indicator discussed by Jacobson and Kernell. In the disastrous mid-term elections of 1974 (for Republicans, anyway), Republicans struggled to recruit quality candidates for Congress, while Democrats put-forth a highly formidable field. For the purposes of their research, Jacobson and Kernell defined a quality candidate as someone who had run for, and won, elected office prior to running for Congress. For Democrats, 38.3 percent of the candidates they fielded in open-seat elections had prior political experience, while Republicans were only able to recruit 12.6 percent. Since candidates who have held prior political office have the experience to wage a winning campaign, they are more likely to win the election (Jacobsen & Kernell, 1981).

In their chapter titled “Candidate Entry, Voter Response, and Partisan Tides in the 2002 and 2006 Elections,” included in the edited work by Jeffery J. Mondak and Dona-Gene Mitchell *Fault Lines*, Walter J. Stone, Nathan J. Hadley, Rolfe D. Peterson, Cherie D. Maestas, and L. Sandy Maisel add to the discussion of strategic retirements and strategic entries in congressional campaigns. The authors point to the importance of party identification in House races and how this can effect whether or not a specific candidate will enter the race. Further expounding on this notion, the authors state that “while local concerns and the politics of the district are often important in explaining House elections, the simple fact that candidates affiliate with the Democratic or Republican party in virtually every district can shift attention away from local interests to concerns that resonate in similar ways across all district races” (2009, p. 61). While former Speaker Tip O’Neill’s assertion that “all politics is local” is relevant, there are other forces at work in the election cycle, including the overall state of the national

political environment. This can shape the decisions of some candidates on whether or not to enter a race.

The authors describe two different scenarios that encompass all congressional elections. In years where there is a partisan tide developing in the cycle, campaigns are more nationally focused, while other years typically feature district-centered campaigns. The research the authors conducted revealed that these two different scenarios effect the strategic decisions of the candidates. More definitively, the authors claim that “the conditions that make for a vulnerable incumbent differ in the two scenarios” (Stone, Hadley, Peterson, Maestas, & Maisel, 2009, p. 69). Using the 2002 elections, which were district-centered, and the 2006 elections, which were during a year of partisan tide, as the basis for their research, the authors found that the quality of the incumbent had a negative effect on the strategic decision of challengers in 2002, and no effect in 2006. In other words, since the 2002 elections were largely district-centered, challengers were less inclined to challenge an incumbent. In the 2006 elections, however, the quality of the incumbent did not matter; rather the party the incumbent was affiliated with had more of an impact on whether or not they drew a challenger in their race (p. 69).

These findings are consistent with the knowledge that incumbents begin an election cycle with an overwhelming advantage over any challenger, regardless of the challenger’s quality. As a result, many quality challengers will either wait for an election where they can campaign against an incumbent’s party, or wait for the incumbent to retire. Open races draw quality candidates from both parties, creating a more level playing field for campaigning.

## Conclusion

The literature on congressional campaigns reveals the diverse opinions and research focuses among political scientists. Themes appearing throughout the literature included the effectiveness and intensity of campaigns, party identification, issues voting, and strategic retirements and entries. Taken as a part or whole, these themes have had a significant impact on the outcome of congressional election cycles. The myriad of themes and factors encompassed in congressional elections leads to some consensus throughout the literature.

Party identification is a consistently accurate predictor of how a person will vote. As Gary Jacobson notes, a person's association with a particular party is part of an individual's identity, and one would only vote contrary to that identification in rare instances. Issues are generally the driving force behind the choices voters make as they go to the polling booth. Local issues are of utmost importance in Congressional campaigns, as Paul S. Herrnson and James M. Curry note. Finally, the strategic election decisions made by incumbents and challengers can have a significant impact on elections. Samuel Kernell and Jacobson's groundbreaking research on this issue shows that the political and ideological mood of the electorate has a major impact on the final decisions of both incumbents and challengers over whether or not to enter a congressional race.

The themes present throughout the literature on Congressional elections are clearly represented in the 2010 election. Party identification, issues, and strategic retirements and entries, each played a role in the outcome of the 2010 election. However, it appears that in every Congressional election since 1994, issues have played a heavier

hand in determining the outcomes of these elections. Whether it be sex scandals, war, or major reform (best represented in health care reform), issues have surrounded and swayed voters to cause major Congressional upsets. The next chapter will address the 2010 mid-term election. By applying the themes found throughout the literature on Congressional elections, we will be able to see how much these themes influenced the 2010 mid-term election outcome. Further, by applying these themes, we will be able to see if new themes presented themselves in the 2010 election.

## **CHAPTER III**

### **AN ANALYSIS OF THE 2010 ELECTIONS**

The political environment for Republicans was toxic heading into the 2006 mid-term elections. President Bush was extremely unpopular, and as figurehead of the Republican Party which controlled all three branches of government, all Republicans were blamed for the problems facing the United States at the time. The Iraq War, three years old at the time, was believed to have been a mistake by 55 percent of the electorate, while, according to a Gallup poll, only 40 percent had the opposite opinion (Campbell, 2011). The economy was also stagnating. The U.S. Bureau of Economic Analysis reported that growth of the gross domestic product (GDP) sank from 1.4% in the second quarter of 2006 to almost zero before the elections (Campbell, 2011). Additionally, the Bush administration's poor handling of the recovery efforts after Hurricane Katrina, left Americans deeply questioning the president's ability to lead.

Republicans in Congress were also suffering major political blunders. Several members of the Republican caucus were caught up in the Abramoff corruption scandal and the Republican leadership was taken to task over the handling of a sex abuse scandal involving a Republican Congressman and a congressional page. Seizing on these questionable judgments of character, the Democrats campaigned on the theme that

Republicans had developed a “culture of corruption,” which resonated with voters (Campbell, 2011).

According to Gallup, the approval rating for President Bush immediately before Americans cast their votes was an abysmal 38%, having lost the support of the independents who helped him win re-election in 2004. In addition, the enthusiasm gap, which gauges how enthusiastic voters of each party are to vote in the election, favored Democrats by a 53-44 percent margin (Gallup, 2010). This mixture led to a wave election that had not been witnessed since the 1994 Republican wave. In all, the Republicans lost 30 seats in the House of Representatives, and six seats in the Senate, losing control of both chambers.

The political environment worsened even more for Republicans in 2008. Confidence in the Bush administration was at historic lows. Opposition to the Iraq War was now twice as much as support for it. The GDP was contracting at this point, and a Gallup survey found that just 15 percent of Americans were satisfied with the states of affairs in the United States (Campbell, 2011). Then, in September an economic crisis occurred, the likes of which had not been seen since the Depression Era. Numerous banks and financial institutions failed, and the stock market lost over one-quarter of its value between September and October. President Bush was largely blamed for the crisis, and his approval rating dropped, according to Gallup, to 25 percent. By association, voters also blamed the Republicans in Congress for the financial crisis, having been in power for most of the decade. When the votes were finally cast, Barack Obama was elected president with over 53 percent of the popular vote, and Republicans in Congress

were handed a defeat which paralleled the 2006 wave election. In all, Republicans lost eight Senate seats and 24 seats in the house.

In the analysis that followed the 2008 election, many politicians predicted the end of the Republican Party, and that Americans had permanently shifted from a center-right ideology to center-left. It seemed that the Republicans were handed a permanent minority status, similar in fashion to the 40 consecutive years they were the minority in the House during the twentieth century. However, the 2010 elections revealed that this was not the case. The massive gains made by the Democrats in the House were completely wiped out in 2010, and greatly diminished in the Senate. This shows that 2010 was, as James E. Campbell describes it, a “restoration election” (2011), returning the legislative branch to a partisan make-up more reflective of the country’s overall political ideology. Just as in 2006 and 2008, party identification, issues, campaign relevance and intensity, and strategic election decisions played a heavy hand in the overall outcome of the 2010 mid-term elections, which this chapter will explore. Additionally, new themes which appeared throughout the 2010 election cycle will be investigated, as they also were contributing factors to the massive change in the partisan make up of Congress.

The dramatic losses experienced by Democrats in 2010 were due to a perfect storm of political obstacles. The conclusions that James Campbell draws in his article are valid, and serve as the best explanation for the size of the Republican wave in 2010. First, the gains made by Democrats in 2006 and 2008 were much too high to be able to hold considering the partisan makeup of the American electorate. The waves enjoyed by the Democrats in 2006 and 2008 were not so much a result of the American electorate’s

ideology moving left, as much as it was a punishment to the Republicans, who controlled the Executive and Legislative branches of government for much of the decade.

Therefore, the Republican wave in 2010 was a correction of the massive gains experienced by the Democrats in the previous two elections.

Secondly, the poor economic conditions at the time of the 2010 elections were another contributing factor. Voter frustrations regarding the slow economic recovery were prevalent especially in the Midwest, an area hit especially hard during the recession. Whenever the economy is the main concern of the electorate, the party of the incumbent president is usually held accountable (Hibbing & Alford, 1981). The elections in 2010 were no exception. Adding to this frustration was the price tag of the legislation the Democratic Congress passed to stimulate the economy. When the stimulus package failed to dramatically turn the economy around, voters saw the \$787 billion spent as a waste of money.

### **Turnout and Party Identification**

Turnout in 2010 was fairly average for mid-term elections. It is estimated that about 88.7 million people cast a ballot in the 2010 elections, which registers about a 40.7 percent turnout rate. According to Michael P. McDonald's analysis of voter turnout in 2010, it was the fourth consecutive mid-term election that saw an increase in voter participation. Although the size of the Republican gains in the 2010 elections were larger than those in the 1994 elections, turnout in 1994 were slightly higher, at 41.1 percent (McDonald, 2010).

McDonald points out that the states that make it easier for citizens to vote had higher participation rates. For example, Minnesota allows Election Day voter registration. In other words, voters can register to vote when they show up at their polling place, instead of having to do so before a state-imposed deadline sometime before Election Day. As a result, and in part because of the hotly contested gubernatorial election in that state, Minnesota saw 55.5 percent of its eligible voters cast ballots. Similarly, Oregon and Washington, which vote primarily through the mail system, had a turnout rate slightly higher than the median turnout among the states, which was about 43 percent (McDonald, 2010).

According to the James M. Jones (2011) of the Gallup Organization, there was a large shift in party identification among the electorate in 2010. Using “aggregated data from 21 separate Gallup and *USA Today*/Gallup polls conducted in 2010, encompassing more than 25,000 interviews with U.S. adults” (Jones, 2011), Gallup found that while more Americans identify themselves as Democrats than Republicans, the number is 5 percent lower than what it was in 2008. According to Jones (2011), 32 percent of Americans identify themselves as Democratic, 28 percent as Republican, and 37 percent as Independents. Most of the change was represented by the increase of those identifying themselves as Independents, as Republicans only increased by one percentage point from 2008 (Jones, 2011).

If one were to look tersely at these numbers, it would be difficult to understand how Republicans were able to make such massive gains in the House if more Americans identify themselves as Democratic or Independent. The answer comes when examining the exit polls conducted of voters who participated in the mid-term election of 2010.

According to an exit poll conducted by the *Washington Post* (2010), the all-important Independent voting bloc broke for the Republicans by an overwhelming 56-37 percent margin. This is similar to what happened during the Democratic wave of 2006, when Independents voted for Democrats by a 57 to 39 percent margin (Washington Post, 2010).

As more Americans identify themselves as politically independent, their importance in elections will continue to increase. As seen in the elections of 2006, 2008, and now 2010, the outcome generally falls on the choices of the Independent voting bloc. This will continue to complicate the American political process, as the base of both major parties drift further toward the extreme ends of the political spectrum. Candidates will have to first win over the base, meaning, promote the policies most important to the fringe elements of the major parties, then immediately moderate their positions in order to win over independents, who are the deciding factor in each election.

### **Issues and the 2010 Elections**

During the 2008 presidential election, President Obama campaigned heavily on the theme that he would change the way Washington works. Campaigning during a time of economic downturn and frustration with Washington, Obama capitalized on voter frustration and scored a resounding victory in the general election. As his administration took office in early 2009, the president's approval ratings were consistently in the 60 percent range. The president benefited from the public's blame on the state of the nation's affairs on the previous administration the Republican's previous decade of control of the legislative branch. However, a series of events would soon occur that

would dramatically change the opinion of the nation regarding the Obama administration's governing performance.

Two legislative priorities of the Obama administration brought concern over government spending into the forefront of politics. In February, 2009, President Obama signed the American Recovery and Reinvestment Act (ARRA), with an estimated cost of \$787 billion, as a way to stimulate the slumping American economy. On the day it was signed into law, ARRA enjoyed the support of 59 percent of Americans, with only 33 percent disapproving. Throughout the summer of 2009, unemployment continued to rise. By May, just a few months after it became law, support for ARRA plummeted to 38 percent, with 39 percent disapproving (McClatchy, 2011). By the time Election Day came, 68 percent of Americans believed that Congress had mismanaged the stimulus money (Busch, 2010). Originally believed to be an electoral boost to Democrats at the time of its passage, Democrats largely avoided mention of the stimulus package during their campaigns, as it had become a politically unpopular piece of legislation.

The economic conditions of the United States did not help the political prospects of Democrats in 2010. A recession began December of 2007, and although it had officially ended in June of 2009 (National Bureau of Economic Research, 2010), the sluggish recovery made it seem as though the recession was still occurring. Indeed, a number of public opinion polls revealed just how sour the public's opinion was toward the economy. For instance, a CBS News poll conducted in July 2010 revealed that 75 percent of respondents believed that the recession would continue for at least another two years.

When looking at economic statistics compiled by Campbell for his article, it is easy to see why the American public was so pessimistic about the economy. Campbell states that when polling places opened in November 2010, “the economy had not experienced three consecutive quarters of real GDP growth over two percent in nearly three years” (2010). Additionally, Campbell points to the fact that the nation had experienced 18 straight months of unemployment above 9.4 percent (2010).

Although President Obama and Democratic candidates campaigned on the notion that they had kept the economy from being much worse, and that the poor economic conditions were a result of the Bush administration, the American public still placed a good deal of blame on the policies of the Democratic Congress and the Obama administration. In an exit poll conducted by news outlet CNN, 65 percent of respondents believed that the stimulus package had either made “no difference” or “hurt the economy” (CNN Politics, 2010). Voters reporting these sentiments broke for the Republicans by an overwhelming margin.

It was the debate over another part of the Obama administration’s attempts to restart the slumping economy that led to the blossoming of the social movement which would have major influence over the 2010 mid-term elections, the Tea Party. Reacting to the president’s proposed mortgage bailout plan, CNBC commentator Rick Santelli launched into a rant against the Obama administration on the floor of the Chicago Board of Trade. It was during this rant that Santelli challenged Americans to come to Chicago and protest the president’s latest attempts to stimulate the economy. Later that year, on April 15, 2009, Tax Day, thousands of Americans in dozens of cities across the nation held Tea Parties, in which they protested the seemingly uncontrolled spending taking

place in Washington, the president's stimulus package. The Tea Party will be addressed in further detail later.

Another legislative priority of the Obama administration, which added to the American anxiety over uncontrolled spending, was health care reform. President Obama began pushing an overhaul of the health care programs in the United States during the summer of 2009. Almost immediately, Republican lawmakers began a campaign to defeat this latest priority of the Obama administration. Democrats, on the other hand, were charged by the president and congressional leadership to go home to their districts during the summer recess to attempt to drum up support among their constituents for the president's attempts to overhaul the nation's broken health care system. Polls consistently showed public opposition to the Democratic health care reform proposals from the summer of 2009 through its final passage in March 2010. Polling firm Rasmussen Reports has released polls on a bi-weekly basis since the legislation's passage, in which they ask voters whether they favor or oppose repeal of the legislation. In every poll, at least 50 percent of respondents have reported an affirmative feeling toward the repeal of the legislation. Support for repeal has at times exceeded 60 percent (Rasmussen Reports, 2011).

Indeed, health care reform played a major role in the 2010 election cycle. While Democrats tried their best to campaign on the positive aspects of the bill, such as extended coverage for children, and the prohibition of pre-existing conditions clauses, Republicans were able to capitalize on the anti-"Obamacare" sentiment in the United States. In the end, health care reform became a toxic issue for Democrats throughout the campaign, regardless if they had voted in favor of its final passage. According to

analysis conducted by Kevin Sack of the *New York Times*, of the 30 Democrats who voted against the measure in March 2010, 17 were defeated in November. Additionally, of the 22 House members representing swing districts voting in the affirmative, 19 were defeated. Most telling was the fact that all five House members who switched their votes from a “no” in November 2009 to “yes” in March 2010 were defeated in November. In all, of the 49 Democratic incumbents who were defeated in November, 32 voted in favor of the health care legislation, while 17 voted against (Sack, 2010).

This is not to say that health care reform was the deciding factor in the election. According to Sack’s (2010) analysis of exit polling, voters remained deeply divided on their opinion regarding the health care legislation. While 48 percent of voters thought that the legislation should be repealed, 47 percent believed that it should either be expanded or left as is. This points to the greater probability that the overriding issue of the 2010 elections was jobs and the economy. Some of the frustration among voters during the election was the fact that Congress did not focus as much energy on the economy as they did on passing other pieces of legislation which focused on other issues such as health care and global warming. In the end, the saying holds true that voters vote with their pocketbooks, and by the time Election Day arrived, most Americans’ pocketbooks were still thin.

### **Regional Analysis of the Vote**

The regional distribution of seats that changed parties in the 2010 elections is somewhat uneven. While all regions of the country saw some change in congressional representation, the most change occurred in the Midwest and the Northeast. Republicans

took control of five seats in New York, Pennsylvania, and Ohio. In Illinois and Florida, Republicans picked up an additional four seats in each state. Tennessee and Virginia each saw Republicans wrest control away from the Democrats in three districts. Texas increased their Republican congressional delegation from 21 to 23 seats.

These changes were not limited to the House. Gubernatorial races, especially in the Midwest, saw huge changes. The states of Wisconsin, Michigan, Iowa, Ohio, and Pennsylvania each saw their gubernatorial offices change from Democrat to Republican. Additionally, Republicans replaced Democrats in the U.S. Senate in Wisconsin, Indiana, and Pennsylvania. Voters in Wisconsin replaced a longtime incumbent Senator with a Republican political newcomer.

When considering the economic conditions of the American Midwest, it is easy to see why there was so much political volatility in the region in 2010. The Midwest was hit especially hard by the economic downturn that began in 2008. Michigan, especially, whose economy relies so heavily on the auto manufacturing industry, was economically devastated, and by October of 2010, their unemployment rate was around 12.8 percent (Bureau of Labor Statistics, 2011).

The only region where Democrats escaped relatively unscathed was the West. In California, the Democrats actually improved their political standing. For instance, every Democratic member of their congressional delegation was re-elected. Additionally, the governorship changed from Republican to Democratic control. Democratic Senator Barbara Boxer beat her Republican challenger, Carly Fiorina, by a double digit margin of victory.

Democrats kept control of the governorships of Oregon and Colorado, while losing control in New Mexico. There, a Latina was elected governor for the first time in the nation's history, handily defeating the Democratic opponent. Susana Martinez, the Republican victor, benefitted from the ethics scandals plaguing her successor Governor Bill Richardson.

The Republicans also continued their dominance of the South. Republicans were returned to the governorships of South Carolina, Florida, Alabama, and Texas. Democratic Arkansas Senator Blanche Lincoln was handily defeated by Republican Jon Boozman, making every state in the South have at least one Republican Senator.

### **Exposure**

Exposure, as explained by Andrew Busch, is “the number of seats held by the president's party” (2010). Real exposure, Busch continues to explain, is the amount of seats that the president's party holds which is above that party's norm. In the context of the 2010 election, Democrats had to defend a very large number of seats. At the time the election was held, Democrats held 255 seats in the House of Representatives. The disparity in exposure was not as large in the Senate. Of the 37 Senate seats up for election in 2010, 19 were held by Democrats, while 18 were held by Republicans. Since the exposure was not as great in the Senate, the likelihood of a change in party control in that chamber was not as great.

Taking a closer look at the seats defended by Democrats in the House, a clearer picture appears of the monumental task facing the Democrats in 2010. The large Democratic majorities that came from the 2006 and 2008 elections were built on

Democrats who won in moderate-to-conservative districts. There were 49 House Democrats in 2010 who were representing a district that voted for John McCain in 2008. An additional 11 Democrats represented a district that voted for George W. Bush in 2004, but not for McCain in 2008. That makes a total of 60 Democrats who represented a moderate-to-conservative district (Busch, 2010).

Of the 52 Democratic incumbents defeated in 2010, 33 were originally elected in either 2006 or 2008. This emphasizes the fragility of those Democratic majorities, and just how much those elections were meant to punish the failures of the Republican president and Congress. These numbers seem to validate the theory presented by Campbell that 2010 was a restorative election. Had the Republicans only won these 33 seats, the partisan distribution of the House of Representatives would have been close to what it was after the 2004 elections, the last Republican House that was elected.

As stated earlier, the exposure was much different in the Senate. There were a number of strategic retirements made by incumbents on both sides of the aisle, as well as a few special elections that were held to fill uncompleted terms in office. These factors served to balance the playing field in the Senate. Since there were a number of open seats, there was not a distinct advantage of one party over the other. However, the Republicans would have needed to win 10 Democratic-held Senate seats in order take control of the chamber.

If there was a year where that could happen, it would have been 2010. Indeed, if Republicans had had higher quality candidates running in Delaware, Colorado, Nevada, and Connecticut, the Senate would have seen a change in party leadership. Polling in

those states consistently showed the possibility for a close election between the two parties. The elections in Connecticut and Delaware were open races, while Nevada and Colorado featured politically vulnerable incumbents who were targeted heavily by the National Republican Senatorial Committee, the political fundraising arm of the Republican caucus in the Senate.

The biggest prize Republicans had their eye on was the seat in Nevada, held by sitting Majority Leader Harry Reid. Nevada in recent years has become purple in its political leanings. Their congressional delegation is closely divided between Republicans and Democrats, and Nevada has supported both Republican and Democratic presidential candidates in the past few elections. This politically moderate environment made it difficult for someone like Harry Reid, charged with the job of being partisan and promoting the efforts of the Democratic Party, of running a campaign that fit to the politically moderate nature of his constituency. Nevada was also hit especially hard by the crash of the housing market, and much of the state's economy depends on the tourism industry, which naturally takes a big hit during economic recessions (Associated Press, 2011). The face of the president's party in the Senate, Harry Reid was in danger of being held especially accountable for the sluggish recovery.

It is generally a sign of impending electoral defeat for an incumbent to poll consistently below 50 percent in pre-election polls. In some polls released throughout the campaign, Reid was polling below 40 percent. For much of the campaign it seemed certain that the sitting Majority Leader would lose his election, the first time such an event would have happened in decades. However, Reid benefited from the incredibly weak field of Republicans seeking their party's nomination. The eventual nominee was

Sharon Angle, a gaffe-prone State Assemblywoman who was backed heavily by the Tea Party. While Angle routinely led in pre-election polls, it was generally within the margin of error, and could never open a big lead. In the end, Reid's incredibly organized get-out-the-vote efforts, especially in the union-heavy area of Las Vegas, pushed the sitting senator over the top with a five percentage point margin of victory (New York Times, 2010).

When Vice President Biden resigned his Senate seat to become vice president, the governor of that state appointed someone who pledged not to seek the seat outright, in order to keep the seat open for the vice president's son and sitting Delaware attorney general, Beau Biden. However, as the political atmosphere for Democrats continued to deteriorate throughout 2009, Biden declined to run for the seat, making the special election an open race.

For months of polling, long-time Delaware Congressman Mike Castle, a Republican, seemed certain of a fall victory in 2010. Castle was consistently registering double-digit leads against presumptive Democratic nominee Chris Coons (Rasmussen Reports, 2010). All Castle had to do was hand perennial candidate Christine O'Donnell a defeat in the Republican primary, and he in all likelihood would become the next senator from Delaware. However, the Tea Party provided the nation a look at just how powerful a voting bloc they were in the Republican primary. The Tea Party-endorsed O'Donnell beat Castle by six percentage points in the primary, all but guaranteeing a general election victory for Coons. This was evidenced by the fact that the first campaign advertisement the O'Donnell campaign had to release was to reassure voters that their

candidate was not a witch. In the end, Coons scored an easy 16 point margin of victory over O'Donnell in the general election.

Had the Republicans nominated the politically popular Congressman Castle, barring any scandals or gaffes, it was almost a certainty that Castle would have won the general election. The problem facing Castle, however, was his very moderate-to-liberal voting record while in the House. In addition, his self-proclaimed pro-choice views did not sit well with the conservative voters in the Republican primary (Kilgore, 2010).

The situation in Colorado was somewhat different. Having been appointed to fill the seat left vacant by the resignation of Ken Salazar to become Secretary of the Interior, Michael Bennet faced a tough re-election battle in the swing state. His greatest vulnerability came from his decisive vote in favor of the health care reform legislation. Bennet's relative lack of political experience also was a factor working against him. Prior to his appointment to the Senate, Bennet served as the superintendent of public schools in Denver. Experienced politicians were anxious to take on the political newcomer.

The Republican primary drew a number of challengers, most notably the former lieutenant governor, Jane Norton, and Weld County district attorney Ken Buck. Norton was the early favorite to win the nomination, having had previous experience winning state-wide elections and an impressive campaign war chest to use. However, as witnessed time and again in 2010, the Tea Party was a powerful force in this primary race. Buck also benefited from the anti-establishment mood in the nation at the time.

Voters were longing for someone who was a political outsider, and Buck fit that mold. Despite some gaffes in the primary, Buck ended up securing the Republican nomination.

For much of the campaign, Buck was considered the slight favorite to win the election. However, he was forcefully and consistently attacked by social groups for his stances on abortion. Buck believed that abortion should not be allowed, not even for the most common exceptions, cases of rape or incest. Buck was also plagued by his decision not to prosecute an alleged rape case based on the fact that the victim “had a prior relationship with the accused” (Clark-Flory, 2010). In the general election, Buck ended up losing the women vote to Bennet by a 17 percent margin. This was a significant factor, considering that the margin of victory for Bennet was only 16,000 votes (Burns, 2010).

The race in Connecticut was always a longshot campaign for Republicans, but the Democratic Party of Connecticut had been bruised by the scandals of retiring Senator Chris Dodd, leading to a weak nominee to face political newcomer Linda McMahon in the fall. Sitting attorney general Richard Blumenthal committed a major gaffe during the campaign that seemed to open a possible path to victory for the Republican McMahon, the former head of World Wrestling Entertainment.

It was discovered that Blumenthal had lied about his military service during the Vietnam War on a number of occasions. McMahon had attempted to seize on these mistruths in order to characterize Blumenthal as a career politician “who has a difficult time telling the truth” (CBS News, 2010). However, McMahon was never able to lead in polling during the campaign, despite the huge cash advantage she enjoyed compared to

Blumenthal. Blumenthal was able to use her past as head of the WWE against her in such a manner that McMahon had to spend much of her time campaigning discussing her employment history, rather than her goals for the Senate.

Had Republicans been able to nominate stronger candidates in each of these states, their chances of capturing control of the Senate would have been much better. Polling conducted before the primaries in Nevada and Delaware consistently showed that voters in those states were ready to elect a Republican to the Senate. Likewise, the toxic environment for Democrats led to their vulnerability in states like Colorado and Connecticut. More politically experienced candidates in each of these states would have been able to effectively take advantage of the political wave that was forming in the country, and ultimately triumphed in the general election.

### **Strategic Retirements**

As discussed in the previous chapter, incumbents must make a decision each election cycle whether or not to retire, or seek another office. Because of the political environment in 2010, there were a number of House incumbents who decided to forego another term as Representative. For many Democrats, this decision was based on the toxic environment they faced back in their home districts. Many Republicans viewed this as an opportunity to seek a higher office, with some opting to run for their home state's governorship, others for U.S. Senate.

In all, there were 45 open house seats in the 2010 mid-term elections. Of these open races, 16 seats flipped to the opposing party, 15 of which were won by Republicans. Some of the most notable retirements were announced by senior Democrat David Obey,

who was chairman of the Appropriations Committee, and Democrat Bart Stupak, who was involved heavily in the debate over the health care reform bill, especially regarding how the bill would cover abortions.

David Obey of Wisconsin was first elected to the House of Representatives in 1969, in a special election to fill a vacant seat. At the time of his election, he was the youngest Member of Congress. Obey's tenure brought him to the chairmanship of the House Committee on Appropriations, which controls the spending of the Federal Government. His powerful position in Congress helped Obey consistently win re-election with over 60 percent of the vote (Rutenberg & Zeleny, 2010).

In the beginning of 2010, polls began to show the potential for a tight general election race. One poll released by the campaign of then-Republican primary challenger Dan Mielke showed Obey, a 40 year incumbent, losing to the republican by a 52-34 percent margin (Rutenberg & Zeleny, 2010). As stated earlier, it is a troubling sign for any incumbent to poll below 50 percent before a re-election race. It is especially troubling for an incumbent with the seniority that Obey enjoyed.

Citing his advanced age, and the fulfillment of a goal to pass health care reform in the United States, Obey announced in May of 2010 that he would not seek re-election. Adding to the surprise of the announcement was the fact that Obey had already hired campaign staff and amassed a campaign war chest exceeding \$1.4 million (Rogers, 2010). Insisting that he would have won had he decided to stay in the race, Obey's retirement opened the way for Republicans to grab ahold of the seat. Obey's late retirement announcement also left Democrats scrambling to find a replacement, whom

they finally found in a state legislator. In the end, however, the Republican wave swept eventual Republican nominee Sean Duffy to a resounding victory in the district.

Representative Bart Stupak of Michigan was a rank-and-file Democratic Congressman who was suddenly thrust into the national spotlight during the debate of the Patient Protection and Affordable Care Act. During the debate over the legislation, Stupak and other socially-conservative “Blue Dog Democrats” voiced their opposition over federal funds being indirectly used to fund abortions. Stupak, along with Republican Congressman Joseph Pitts submitted an amendment before the House, known as the Stupak-Pitts Amendment, which would prohibit funds being used for abortions. The measure was approved by the House of Representatives but was not included in the Senate version of the bill (House of Representatives, 2009).

Stupak had enough Democratic support of his effort to put the final passage of the health care bill in peril. An eventual compromise with the Obama administration led Stupak to throw his support behind the bill, allowing its final passage. The speculation began almost immediately regarding the re-election chances of the 17-year incumbent. Stupak’s insistence on the inclusion of pro-life language in the bill, and his subsequent compromise with the president drew challenges from both the left and right. Stupak had drawn a primary challenge from a pro-choice candidate during the process, and Republicans from around the country began to contribute heavily toward the campaign of the Republican who seemed to be the most likely to win the party’s primary in August of that year. In May, Stupak announced his intention to retire at the end of his term, citing a desire to spend more time with his family (Allen & Kraushaar, 2010).

The strategic retirements of Obey and Stupak are only a couple of examples of what many Democratic House incumbents decided to do in 2010; they determined it would be better to end their congressional careers in retirement, rather than risk an electoral defeat. Both of their seats went to Republicans in 2010, but it remains to be seen whether these freshmen Republicans will be able to retain their seats in 2012. Both of these men were long-time incumbents of the seats they held in Congress, increasing the vulnerability of their successors.

### **Campaign Intensity**

Measuring campaign intensity by spending, the 2010 elections were very active. The Center for Responsive Politics (2010) estimated that the amount of money spent during the mid-term elections of 2010 surpassed 2006 by almost \$1 billion. They use a couple of factors to explain the large increase in spending. First, agreeing with Jacobson's hypothesis, the amount of competitive races across the country resulted in candidates expending more money for their campaigns. The more competitive a certain race is, the more money candidates will spend to try and gain an advantage in messaging and public opinion.

Secondly, the 2010 elections were marked by a change in federal law regarding campaign contributions. The Center for Responsive politics, as reported by the blog OpenSecrets.org, explains that "recent federal court decisions have armed corporations, unions and ideological organizations with the firepower to spend as much as they want, whenever they want on political messages saying just about anything they want, no matter how scathing or partisan" (2010). Analysis in spending revealed that for every \$1

spent by a liberal organization, conservative groups on behalf of Republican candidates spent \$2. This advantage in third party contributions most certainly assisted in the Republican takeover of the House.

Further proving the validity of Jacobson's hypothesis that the more incumbents spent, the worse they performed, the DCCC greatly outspent the NRCC in the week before the election. In the final days of the election, the DCCC spent over \$24 million on behalf of Democratic candidates around the country. In a shocking contrast, the NRCC spend just over \$1.3 million on behalf of Republican candidates in the final week of the election. Looking at total spending for 2010, the DCCC spent over \$63 million dollars throughout the election cycle, compared to \$44.5 million by the NRCC (Washington Post, 2011).

### **Tea Party**

A new social movement sprung up seemingly out of nowhere in early 2009. The rise of the movement was so sudden that many observers were perplexed as to what it was all about and what potential effects the movement would have on American politics. The Tea Party was never a single organization with a unified message. Rather, there were several Tea Party groups around the country, each with their own organization and leadership, and each with their own agenda and messaging strategy.

As mentioned previously, it was CNBC personality Rick Santelli who gave the name to the growing movement of Americans who were protesting the spending of the federal government. Most of the disapproval was directed toward the passage of the Toxic Asset Relief Program (TARP) and the stimulus package. Added together, the price

tag of these two pieces of legislation totaled in excess of \$1.4 trillion. It was Santelli who encouraged Americans to protest the uncontrolled spending of the government on Tax Day, calling it a modern version of the Tea Party of the American Revolutionary era.

All across the country, different groups sprang up and gathered to protest TARP and the rest of the recovery proposed by the Bush and Obama administrations, and passed by Congress. The unorganized nature of the gatherings was emblematic of the grassroots nature of the movement. Dismissing the Tea Party as “Astroturf,” Speaker of the House Nancy Pelosi attempted to explain away the blossoming social movement as a fake grassroots movement funded by the rich in order to pressure Congress to extend the Bush era tax cuts for the wealthiest of Americans (Courser, 2010).

As the debate in Washington started to shift toward the topic of health care reform, so too did the focus of the Tea Party’s ire shift toward this latest high price tag legislative agenda. Throughout the summer of 2009, Members of Congress returned to their home districts during their summer recess, charged with the task of selling this new health care reform package. Many Members of Congress held town hall style meetings in their district, a traditional practice intended to create “face time” between a Representative and their constituency. What are normally sparsely attended events, these town hall meetings became an arena for many, including Tea Party members, to voice their anger over the perceived overreach of government into the lives of Americans. These town hall meetings gave the Tea Party a more focused message; it was opposition to health care reform that gave the Tea Party a platform to become a mainstream movement (Courser, 2010).

While those affiliated with the Tea Party were proud of the fact that they were strictly a grassroots organization, the truth is that they did benefit from the assistance of powerful figures such as Glenn Beck and Dick Armey. It was organizations such as Beck's "9-12 Project" and Armey's "Freedom Works" that provided the monetary backing and media coverage that the Tea Party needed to spread their message to a broader audience. So, as Zachary Courser (2010) accurately explains in his analysis of the Tea Party's effects on the 2010 elections, the Tea Party movement fell somewhere between grassroots and Astroturf (an artificial grassroots movement).

The Tea Party wishes to be independent from any established political party. In a way, they have succeeded in that goal by not officially being recognized by either of the major political parties. However, it is important to note that the overwhelming majority of candidates the Tea Party endorses are Republicans. On the same token, it is only Republican candidates that claim to support the Tea Party. In a way and as Courser also noted, the Tea Party has already been commandeered by the Republican Party (2010). It was a Republican Congresswoman, Michele Bachman, who founded the Tea Party Caucus in the House of Representatives in 2009. While the intent of the Tea Party is to remain independent from any political party, it is clear that they almost exclusively support Republican candidates.

While the focus of most of the Tea Party's efforts in 2009 was to defeat Democratic candidates, they also targeted several Republican incumbents who they believed had lost their way from supporting small government and conservative fiscal issues. While their success in this endeavor varied, it established a mindset among Republican candidates for office that if they wanted to win, they had better be in the good

graces of the Tea Party. It was this success against Republican incumbents that also helped shaped the narrative that 2010 was not so much an anti-Democratic year, but an anti-incumbent year.

One of their biggest successes came in Utah. Senator Bob Bennett, the incumbent, was first elected to the Senate in 1992, and served as a rank and file Republican senator until 2006, when Minority Leader Mitch McConnell tapped him to serve on the Republican leadership team as Counsel to the Minority Leader. This leadership move firmly ensconced him as a member of the Republican establishment in the Senate. Coupled with his votes in support of the bank bailouts, and his own proposed legislation during the health care reform debate that would have required Americans to buy health insurance, Bennett became a prime target for the Tea Party.

The Tea Party packed the local Republican conventions in the hope of having their members elected to sit at the statewide Republican convention. In the end, they were successful. In the second round of balloting at the state convention, Bob Bennett failed to acquire the necessary number of votes to appear on a statewide primary ballot, ending his career in the Senate (Gehrke, 2010). Bennett's defeat sent shockwaves across the country, essentially sending the message that the Tea Party was willing to target both Republicans and Democrats they deemed to be part of the Washington establishment.

The Republican primary in Alaska also had its elements of political drama. Incumbent Republican Senator Lisa Murkowski was running for re-nomination by the Republican Party for a second full-term as Senator for Alaska. Not originally a target of the Tea Party, Murkowski nevertheless got the attention of the Tea Party after the former

governor of Alaska, Sarah Palin, endorsed her primary rival, political newcomer Joe Miller. A darling of the Tea Party movement, Palin and her husband Todd had a history of bad relations with the Murkowski family. It was in 2002 that Palin challenged Murkowski's father, then-Governor Frank Murkowski in the Republican primary, and won. Palin had resigned from the Murkowski administration over frustrations regarding possible ethics violations she witnessed.

It was only after the Palin endorsement that the Tea Party became involved in the Alaskan Republican primary. The California-based Tea Party Express poured over \$600,000 into the race on behalf of Miller. After a bitterly contested campaign, Miller defeated Murkowski by just over 1,600 votes. After Murkowski conceded, the Tea Party express thanked Palin "who first called our attention to this race" (Cockerham, 2010).

This race would not only represent of the Tea Party's greatest successes in 2010, but also one of their most humiliating defeats. A few days after conceding the Republican nomination to Miller, Murkowski announced her candidacy as a write-in candidate on the fall ballot. After the completion of the vote counting in November, Murkowski became the first Senator to win election on a write-in campaign since Strom Thurmond in 1954 (Cockerham, 2010). Miller initially refused to concede, even going so far to officially challenge the election results. However, Murkowski's lead was so great that any change in the outcome seemed highly unlikely. The courts agreed, and Miller eventually conceded on December 31, 2010.

The Tea Party had considerable success in other states discussed previously, most notably Delaware and Nevada. In Florida, the Tea Party successfully drummed up

enough support for Marco Rubio in the lead-up to the primary that NRSC-endorsed Governor Charlie Crist chose to leave the Republican Party and run as an independent. Also, in the gubernatorial primary in that state, Tea Party-backed Rick Scott narrowly defeated the state's Attorney General Bill McCollum.

In late 2010, the *Washington Post* conducted a canvas of Tea Party organizations across the United States to gain a better understanding of this new movement. According to *Post* staff writer Amy Gardner (2010), they were able to find 647 different organizations that claimed to be part of the Tea Party movement. The findings of the *Post* underscore the fact that the movement is really a loose network of several independent organizations not affiliated with a major political party.

For example, 42 percent of the groups responded that they were unaffiliated with any established major Tea Party organization, while 32 percent claimed to be affiliated with the Tea Party Express. In response to being asked the purpose of their group, 57 percent said it was "to operate as a network of independent political organizations" (Gardner, 2010). Additionally, 63 percent responded that there was no single public figure who represented the Tea Party movement, or could not think of someone who did (Gardner, 2010). Interestingly, the national figure who was mentioned most often was Sarah Palin, further evidence of her influence within the Tea Party.

It is not surprising that 99 percent of the groups surveyed cited "concern about the economy" as an "important factor driving group support" (Gardner, 2010). The economy was the most important factor in the election as a whole. What is more telling is that 92 percent cited opposition to the Obama administration and the Democratic Party, along

with 87 percent also stating that opposition to the Republican establishment were also important factors (Gardner, 2010). This clearly shows that the Tea Party was not only focused on the defeat of Democrats who supported big government programs, but also Republicans who, if they did not support the programs, did not do enough to stop them.

Analysis into the Tea Party will continue for some time to come, and it is needed. It is rare for such a spontaneous movement to influence an election in such a way as the Tea Party did in 2010. After the elections were over, the Tea Party seemed to drift off the radar screen of American politics. This should not be taken as a sign that the movement is no longer active. It will remain to be seen what sort of impact the Tea Party will have on the 2012 presidential elections. If the volatility of the race for the Republican nomination is any indicator, it seems as though the Tea Party has yet to coalesce their support behind one candidate, but this may change as voters begin to cast their votes.

## **Conclusion**

The 2010 mid-term elections marked the largest Republican victories since 1938. Republicans took control of the House of Representatives, greatly diminished the Democratic majority in the Senate, retook a majority of state governorships, and aided by over 700 state legislative victories, took control of a majority of the state legislatures across the United States. Clearly, a Republican wave swept across the nation in 2010.

The Democratic losses were dramatic. The reasons for these dramatic losses can be explained by a few factors in addition to party identification, issues, campaign intensity, and strategic retirements. First, the Democratic victories in the House and Senate which they amassed in 2006 and 2008 were too numerous to maintain. The size

of the Democratic majority in Washington was not representative of the overall ideological orientation of the American electorate. Thus, a correction had to occur, which happened to take place in 2010. However, it is possible that the electorate over-corrected itself. The current 242-193 Republican advantage in the House will likely shrink after the 2012 elections and return to the pre-2006 partisan distribution.

Democrats who stayed home in 2010 will likely return to the polls in 2012 to help re-elect President Obama. With this increase in Democratic voters will come an increase in Democratic representation in the House of Representatives.

Second, the voter outrage over the Patient Protection and Affordable Care Act and the American Recovery and Reinvestment Act fueled Republican and Independent determination to send a message of rebuke to the Obama administration. The perceived out-of-control growth of the federal government angered enough conservative and independent voters to motivate them to go to the polls in numbers that far outweighed the Democratic participation. This imbalance in voter enthusiasm helped lead to massive Republican gains in the House, and modest gains in the Senate.

Third, the nation still felt as if the economy was in a recession. Although the recession technically ended in June 2009, the recovery was moving at such an anemic pace that voters decided to punish the party of the president, who, rightly or wrongly, is perceived as setting an agenda that is conducive to economic growth. Since unemployment was still hovering around 10 percent by the time voters cast their ballots, it is clear that the American electorate felt that the Democratic Congress and president were not doing enough to improve the economic environment in the United States.

It remains to be seen whether the size of this new Republican majority in the House will hold after the 2012 elections. Based on history, it probably will not. However, the elections in 2012 will be much more contingent on the race at the top of the ballot, the presidency. If President Obama wins by the same margin he did in 2008, it is safe to assume that Congress will be much more balanced than it is now. However, if economic conditions do not improve, and Republicans win the White House, it is possible that the Republican majority either stays as it is now or increases, as well as winning control of the Senate.

## CHAPTER IV

### THE TEXAS 17<sup>TH</sup> CONGRESSIONAL DISTRICT RACE

When Tom DeLay engineered the mid-decade redistricting of Texas's congressional districts in 2003, his intent was to once and for all establish Republican dominance of the state's congressional delegation. DeLay and the Texas legislature redrew the many congressional districts in such a way that favored Republicans heavily and caused long-time incumbent Democrats to lose their seats. However, Chet Edwards, representing the 17th congressional district, managed to hang on to his seat for the next three election cycles, before being defeated in the Republican wave of 2010.

Entering the 2010 election cycle, the 17th district was the most Republican district in the country to be represented by a Democrat, with a Cook Partisan Voting Index of R+20 (The Cook Political Report, 2009). The district was specifically designed to be heavily Republican, encompassing many rural areas which tend to heavily favor Republican candidates in Texas. However, Edwards managed to escape defeat in the elections following the redistricting, although at smaller margins than are typically seen by incumbent Representatives. The 17th district was routinely on the National Republican Congressional Committee's wish list for change in control. Edwards seemed to benefit from his reputation for having excellent constituent service, and his position on the Armed Services Committee, as Army base Fort Hood was part of his district.

The 2010 race in the 17th district is representative of the themes discussed previously. This chapter will reveal how the themes discussed previously in the literature review played a factor in the outcome of this election. A closer analysis of this race reveals the implications that party identification, issues, and campaign intensity had in the eventual defeat of this long serving incumbent.

### **Campaign Intensity**

The race between Democratic Representative Chet Edwards and Republican businessman Bill Flores is an example of the importance politicians place on campaigning. This is especially true for Mr. Edwards, as he routinely defied the assumptions of political prognosticators in being able to win re-election in a district specifically designed to defeat him. Mr. Edwards approached this election with the same view, routinely telling reporters throughout the campaign that he would once again defy the odds and win another term in Congress. In September 2010, Edwards told Morgan Smith of the *Texas Tribune*, “I’ve had half a dozen opponents do partisan internal polls that show their candidates ahead of me, and on Election Day we’ve beaten every single one of them. People in my district know me, and know I’ve worked hard” (Smith, 2010). This reflects the natural advantage incumbents enjoy when running for re-election. Their near universal name recognition is often a big obstacle for challengers to overcome. However, the tough political environment Edwards faced, in addition to the well-financed challenger, neutralized his incumbency advantage.

In the final weeks of the campaign, both Edwards and Flores made many public appearances within the district, seeking to generate as much face time with the voters as

possible. For example, Flores held four town hall meetings in one day to discuss the federal budget. Both Flores and Edwards also attended tail gate events at Texas A&M University in College Station, located within the 17th district. Both candidates capitalized on any opportunity to mingle with voters of the district, seeking to make a personal touch with as many people as possible (Watkins, 2010).

The intensity of the campaign in the district was also reflected in the amount of spending by both candidates, and committees on behalf of the candidates. Flores was able to self-finance a large part of his campaign, using well over \$1 million of his own money to fund his campaign operations. In a striking comparison, Edwards spent a grand total of \$0 of his own money on his campaign, relying instead on the donations of individual donors and political action committees (OpenSecrets.org).

Perhaps what was most revealing of the intensity of the campaign was the strategic spending of the National Republican Campaign Committee and the Democratic Congressional Campaign Committee. Wanting to finally knock Edwards out of the seat he held for so long, the NRCC spent nearly \$500,000 on behalf of Flores. The DCCC, however, only spent \$58,000 on behalf of Edwards. In an interesting turn of events, the NRCC suddenly pulled its continued funding of the race in late October. Democrats claimed that this was a sign that Flores was behind in the race and Republicans were conceding the race. The NRCC, however, said that they decided to spend the money on other races since Flores was so far ahead (Mann, 2010).

## Issues

The candidates used issues in a way that directly support the hypothesis of Paul S. Herrnson and James M. Curry discussed in chapter two. Herrnson and Curry argued that when national issues are the prominent focus of congressional campaigns, candidates will focus their campaign narratives toward the issues that will benefit them the most. When a particular candidate is associated with an unpopular incumbent party, or unpopular president, they tend to focus more on local issues during the campaign. This is exactly what transpired in the race between Edwards and Flores.

From the start of the campaign, Flores' message focused on the national themes that dominated the election cycle, which were government spending and health care reform. Flores touted his experience as a businessman to appeal to voters concerned with the state of the national economy. He also consistently tried to tie Edwards to the Obama Administration, even mentioning the fact that the incumbent Democrat was on the short-list to be the vice-presidential nominee in 2008 (Smith, 2010, September 25).

A Flores advertisement released in September did not mention any local issues, rather, its purpose was to remind voters that their congressman was a Democrat. It mentioned Edwards' record of voting with Democrats 96 percent of the time, and supporting the "Pelosi budget to raise taxes on the middle class." Flores was also sure to mention President Obama and Edwards' vote in favor of the stimulus package passed in 2009. In one advertisement, Flores linked Edwards to an unpopular Congress and unpopular president (Mann, 2010, September 25).

As Flores tried to link Edwards to Obama and the rest of the Democrats in Congress, Edwards sought to distance himself from them. In one particular ad released in September, Edwards touted how he “stood up” to Obama and speaker Nancy Pelosi when they “pressured” him to vote in favor of health care reform and cap and trade. In the same ad, Edwards was able to mention his opposition to Democrats in Washington, his record of “voting with the conservative Chamber of Commerce sixty-seven percent of the time,” and his endorsement from the National Rifle Association (Stein, 2010).

The Edwards campaign focused mostly on issues pertaining to veteran and military affairs, as the district is home to many active and retired military personnel. He held a lengthy “Vets for Chet” tour throughout the district, in an effort to remind voters of the influence he held in Washington as chairman of the House subcommittee in charge of veteran affairs (Smith, 2010, September 3). In one particular advertisement paid for by Edwards’ campaign, the embattled congressman attacked his challenger for wanting to privatize the health care of veterans and accused him of putting the medical care of wounded veterans in jeopardy.

The messaging of the Edwards campaign clearly reveals its intention to distance themselves from the Democrats in Washington, and focus instead on all the ways Edwards was in line with the views of the district. His advertisements touted his conservative tendencies and his record of success regarding issues that are important to the district. The Edwards campaign recognized the importance of trying to steer the focus of the race toward local issues because the congressman was the member of an unpopular incumbent party.

In the opposite manner, the Flores campaign heavily focused on national issues, more specifically the stimulus package and the health care reform bill. Although Edwards voted against the president's health care plan and the other hot-button piece of legislation, cap and trade, the mere fact that he was a member of the party in power was all the Flores campaign needed to do to put Edwards on the defensive throughout the campaign. In an election cycle so heavily focused on national issues, the Flores campaign had to keep the narrative of the race on the problems in Washington.

### **Party Identification**

As the mid-term election cycle began, Edwards was probably the most endangered Democrat in the House. He was a Democrat with the most Republican district in the country. With a Cook rating of R+20, winning the 17th district was a top priority of the NRCC in 2010, just as it had been in 2004, 2006, and 2008. However, Edwards believed that he could again sway enough Republicans and Independents to vote for him that he would escape defeat, however narrow it was. His margins of victory in the 2004, 2006, and 2008 elections had been considerably less than what is typically seen by an incumbent. In fact, in 2008, despite the fact his Republican challenger spent only \$100,000 compared to his over \$2 million, Edwards only won by six percentage points.

Edwards was particularly adept in communicating the need for less partisanship in Washington and using that message to attack Republican challengers who focused on the need to have a Republican in Congress representing a Republican district. In 2004, the first election held after the 2003 redistricting, Republican nominee state Rep. Arlene Wohlgemuth, used President Bush in her ads, saying, "I am proud that I will be receiving

the vote of President George W. Bush.” She continued, “This is a Republican district, it deserves to have a conservative Republican representing it” (Barone & Cohen, 2009, p. 1453). Edwards quickly spun the message, using it to his advantage by pointing to it as another example of too much partisanship, saying “While Mrs. Wohlgemuth is focusing on partisanship on every breath in this campaign, I find voters feel strongly, including Republicans, that we need less partisanship in Washington, not more” (Barone & Cohen, 2009, p. 1453). In the end, Republicans agreed with him, as Edwards was the only Democrat targeted in the redistricting efforts to win re-election to Congress. Showing just how Republican the district is, President Bush received 70 percent of the vote over Senator John Kerry’s 30 percent.

In the midst of the debate over the health care reform bill in the Congress, a few events served as a possible warning sign for the prospects of a Republican wave in 2010. First, in November 2009, Republicans were elected to the governorships in Virginia and New Jersey, two states carried by President Obama in 2008. Then, in January 2010, Republican Scott Brown was elected to fill the Senate seat left vacant by the death of liberal Senator Edward Kennedy of Massachusetts. Possibly seeing this as a warning sign, Mr. Edwards voted against the cap and trade bill and the health care reform plan as it came up for final passage in March 2010. Edwards explained his vote by saying, “Over the past year, I have listened to the people of our district and believe my ‘no’ vote reflects their values and mine that we simply cannot afford this new spending bill, given our massive federal deficits” (The Washington Post, 2012).

In a poll released in May 2010 by Republican pollster Wes Anderson, as reported by Stuart Rothenberg (2010) of The Rothenberg Political Report the first glimpse into the

coming fight for Edwards to retain his seat, Flores led Edwards by a margin of 53 to 40 percent. This was the first sign that the Republican district was finally ready for a Republican representative. In August 2009, Anderson had shown that Edwards would beat Flores in a hypothetical general election contest by eight percentage points (Rothenberg, 2010). The same poll showing Edwards losing to Flores also revealed that the incumbent remained politically popular within the district. Anderson explained this disparity by saying, “There are a whole bunch of Republican voters who like Congressman Edwards. They say that they voted for him in the past, but they aren’t going to do it this time. This election isn’t about Chet Edwards” (Rothenberg, 2010). Had the election been held in a year that was less toxic for Democrats, it would be a reasonable hypothesis to argue that Edwards would have once again won re-election.

## **Conclusion**

By the time all of the votes were counted, Bill Flores finally delivered Republicans the seat they had been coveting for so long. Edwards was resoundingly defeated by a vote of 61 to 38 percent. The incumbent Democrat was a casualty of the Republican and anti-incumbent wave which swept the country in 2010.

The race for the 17th district was an accurate reflection of the themes presented in the second chapter. Both candidates obviously saw the relevance of campaigning, as evident in the amount of personal touches made to voters throughout the election cycle. The intensity of the campaign was clearly shown in the amount of money spent during the election, and by the national attention paid upon it by the national parties and the media.

The candidates approached issues in a way that would benefit their respective campaigns. The Flores camp sought to keep the attention on national issues, as this would clearly benefit him as a member of the party currently out of power. The Edwards campaign, quite oppositely, sought to keep the campaign narrative focused on local issues, as the overall national environment was toxic for Democrats in 2010.

Party identification also played an important role in this race. As the district was designed to be heavily Republican, Flores used his natural ideological advantage to continuously remind voters that Edwards was a member of the Democratic party, and an ally of both President Obama, who was unpopular in the district, and Speaker Pelosi, the two figureheads of Democratic leadership in Washington. Edwards, on the other hand, sought to highlight the ways in which he was ideologically similar to his constituents, reminding voters of his National Rifle Association endorsement and his tendency to vote for issues that were important to the conservative Chamber of Commerce.

This race between Flores and Edwards was representative of the overall national outcome of the mid-term elections. The anti-incumbent, anti-Democratic wave was certainly present in the 17th district, as it claimed Edwards, an incumbent Democrat, as a victim. It would be hard to imagine a scenario where a Democrat would once again represent this heavily Republican district, but as Edwards had proven in previous elections, it is certainly not impossible for a Democrat to win.

## CONCLUSION

The review of literature on congressional elections reveals a few main themes that are prevalent throughout the literature. First, there is an ongoing discussion as to the relevance of campaigns and the effects they have on the outcome of an election. The minimal effects theory states that the outcome of an election is already known due to the “existing information and prejudices that voters possess” (Brady, 2006). Other scholars such as Gary C. Jacobson argue that campaign intensity, often measured by the amount of spending on the part of candidates, has an effect on election outcomes.

Party identification is also a major theme in the literature. This is especially significant in the way campaigns target certain demographics and build winning coalitions. Voters identify themselves with a political party about as strongly as they identify with a religious belief or an ethnic group. In other words, association with a party has become a part of personal identity. Therefore, the likelihood of a voter’s party affiliation to change from one election to the next is very slim. As a result, campaigns will often work to solidify their natural base of support, or voters of the same political party, then try to sway independents and members of the opposite party in order to win. Recently, however, the amount of Americans classifying themselves as independent has sharply risen, making them a more important voting bloc for candidates to target.

Issues also play an important role in congressional elections. Candidates will focus on issues that will most help their election effort. Most candidates will focus on

valence issues, which are generic policy stands on the economy, job creation, and other issues that are generally viewed favorably. Candidates will largely avoid positional issues, which force them to take a stand on a certain policy. Most importantly, the literature reveals that the outcomes of elections are closely correlated to the nation's ideological mood. In other words, when national voters prefer more government activism, they tend to vote Democratic, as witnessed in the 2006 and 2008 elections, when voters wanted more government intervention in the economy. When the national sentiment leans more toward limited government, voters tend to vote Republican.

Finally, strategic retirements and entries, or strategic campaign decisions, is a point of scholarly focus. Every two years incumbents in the House of Representatives must make the decision to either retire, run for re-election, or seek higher office. The motivating factor are often the current political environment. Months before an election is to be held, candidates will use media reporting and public opinion polls to try and gauge their chances of victory. If the environment looks particularly hostile to their party, many senior members of Congress will opt for retirement rather than risk electoral defeat. This also leaves the door open for a future run for higher office.

When analyzing the outcome of the 2010 elections, the relevance of these themes is apparent, and are important in trying to explain the factors behind the magnitude of the Republican pick-ups in the House of Representatives. First, there was a large shift in party identification, with a large increase in the amount of voters classifying themselves as independents. Republicans were able to win a large majority of independent support, fueling the takeover of the House.

Government spending and the economy were the overriding issues in the mid-term elections. Public discontent over the cost and effect of the American Recovery and Reinvestment Act, and the unpopularity of the Patient Protection and Affordable Care Act, gave Republicans a platform on which to run, and put the Democrats on the defensive from the outset of the campaign. Republicans were successful in their efforts to turn the elections into a national referendum on the policies of the Democrats in Congress and the Obama Administration. Having the narrative focused on national issues assisted Republican candidates as the opposition party.

Strategic campaign decisions were prevalent in the lead-up to the 2010 elections. Several senior members of Congress chose to either retire or run for higher office. In all, there were 45 open House seats in the mid-term elections. Of these open seats, 16 flipped to the opposing party, 15 of which were won by Republicans.

In terms of campaign intensity, the 2010 mid-term elections were characterized by massive amounts of campaign spending, with total expenditures rising to the range of \$3 billion. Overall, Republican campaign organizations outraised and outspent their Democratic counterparts, though in some competitive races, the Democrats had a slight edge in fundraising. However, the advantage in voter enthusiasm for the Republicans led to an increase in donations, allowing for the national party to have more resources at its disposal to help candidates around the country.

Other factors contributed to the dramatic nature of the Republican victory in November 2010. Democratic exposure, particularly in the House, was an obstacle. The Democratic waves of 2006 and 2008 were not representative of a shift in political

ideology in the United States. Rather, it was the result of voter frustration with the Bush Administration, the political missteps of the Republicans in Congress, and public unease over the weakening economy. Therefore, the size of the Democratic majority was not representative of the ideological makeup of the voting public, leaving Democrats without a strong winning coalition to depend on for re-election. The 2010 elections resulted in a Congress that is more representative of the center-right tendencies of the American public. However, it is likely that there was an over-correction, which could result in the loss of Republican seats in the House, while still maintaining a Republican majority in 2012.

The Tea Party also had a considerable effect on the elections. This social movement conglomeration of fiscally conservative voters successfully organized the defeat of several incumbent Members of Congress, both Republican and Democrat. While their influence in 2010 was obvious, in the period of time that has elapsed since then, their significance has appeared to diminish, being replaced by a movement representative of the other end of the political spectrum, Occupy Wall Street. It remains to be seen the political organizational prowess this movement may have, but could have big implications in a presidential election year.

As the elections of 2012 approach, political scientists and pundits alike will study the state of the political environment for both Republican and Democratic candidates seeking federal office. As the presidency is up for election in 2012, the race for the White House will undoubtedly be the focus for most voters as they make their decision of who to support for the highest office in the land. What will remain unknown is the effect the presidential race will have on the offices further down the ballot. If President Obama

is headed toward a reelection in the style of Ronald Reagan in 1984, will this translate to large Democratic gains in the House and Senate? Conversely, if the Republican nominee, whomever he may be, wins the White House, will voters balance out the power in Washington by saddling him with a Democratic-controlled Congress?

While there are relatively little presidential elections to study where the outcome was as decisive as the Reagan 1984 or Nixon 1972 victories, there are several examples where the White House was won by one party, while the Congress was won by another. In 1996, President Bill Clinton easily won re-election over Senator Bob Dole, but Americans returned a Republican majority to Congress. In the Nixon landslide of 1972, Democratic majorities were returned in both the House and the Senate. The coattail effect of the presidential race does not always carry through to the races further down the ticket.

It is too soon to make a prediction as to the effect the 2012 presidential race will have on the fight to control Congress. The certainty so far is that Republicans are confident that they can retain their House majority, and pick up a majority of seats in the Senate. Democrats are confident that they will retake control of the House of Representatives, and add to their majority in the Senate. It is also guaranteed that campaigning, political identification, issues, and strategic retirements will also play a role in the outcomes of the 2012 elections.

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## VITA

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