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## Incumbent ideology, district ideology, and candidate entry in U.S. congressional elections, 1954–2008<sup>☆</sup>



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### ABSTRACT

This paper investigates the role of incumbent ideology on quality candidate entry in U.S. congressional elections. Looking at district ideology, the analysis shows that members of the House and Senate face different ideological incentives in terms of opponent quality. For officials from highly ideological districts, greater ideological extremity is advantageous as it discourages strong opponents. For members from cross pressured districts, however, greater extremity may increase the likelihood of facing a strong opponent. Although the magnitude of these findings vary by party, they illustrate that incumbents face diverging ideological motivations in terms of discouraging strong challengers based on the ideology of their district.

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### 1. Introduction

Whether or not an incumbent faces a quality challenger matters to election scholars because of the strong link between candidate quality and election outcomes (Jacobson, 1989; Squire, 1992). While incumbents are notoriously difficult to defeat under most circumstances, challenger quality plays a major role in the election result.

The central interest of this paper is the relationship between incumbent ideology and quality challenger entry. Relatively few works directly link challenger quality with

incumbent ideology. Research from Bond, Covington, and Fleisher (1985), looking at the House, finds that greater ideological distance increases the potential for challenge; looking at the Senate, Adams and Squire (1997) find a very limited role for incumbent ideology on entry. While work on electoral outcomes such as Canes-Wrone, Brady, and Cogan (2002) find that more extreme incumbents received a lower general election vote percentage, the question remains whether incumbent positioning can affect the preceding step, the quality of challengers that incumbents face. As challenger quality strongly influences election outcomes, it is important to better understand the role of an incumbent's ideology on challenger emergence.

As quality challengers likely enter strategically, it is also important to look at the interplay between incumbent behavior and district ideology. Specifically, as district ideology clearly predicts election outcomes, quality opponents will likely consider district ideology when making their entry decisions. The expectation is that greater incumbent extremity serves to discourage strong opponents when the incumbent's ideology and the district's ideology are

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congruent.<sup>1</sup> In these districts, the majority of modern congressional seats, a Republican incumbent's conservative signals in a conservative district, for example, should discourage quality Democratic opponents from entering. Conversely, for an incumbent oriented counter to the district's ideological direction, such as a liberal Democrat representing a somewhat conservative district, ideological extremity should be a costly behavior encouraging quality candidates to challenge. Thus, the expectation is that the effect of incumbent ideology on candidate entry is conditional on district ideology. If the empirical models support these expectations, as the majority of districts are congruent, the electoral incentive for incumbents to moderate in terms of challenger quality will be limited to relatively few members of Congress.

This study finds, by looking at House and Senate elections from 1954 to 2008, a conditional relationship between ideological extremity, district ideology, and quality challenger entry. After accounting for standard political and incumbent factors, the majority of congressional incumbents have no greater likelihood of facing quality opponents if they become more ideologically extreme. Only a small subset of congresspersons from places where district ideology runs counter to the incumbent's ideology face an increased likelihood of being challenged by strong opponents based on greater ideological extremity. These findings offer the discipline additional understanding of incumbents' strategic considerations and could offer some leverage over modern congressional behavior, such as polarization.

## 2. Candidate emergence and incumbent characteristics

To understand the influence of incumbent ideology on entry, it is necessary to examine the decision making process of potential, high quality candidates. In their seminal work, [Jacobson and Kernell \(1983\)](#) find that strategic politicians enter when they see their chance of victory as the highest. Their work modeled the entry decision calculus as one where potential candidates measured the probability of winning against the value of the seat and cost of the election. This analysis of the costs and benefits of entry remains widely utilized, although more recent work has modeled ambition as a preceding step in the entry process ([Maestas, Fulton, Maisel, & Stone, 2006](#)).

Looking at candidate entry, [Bianco \(1984\)](#) finds challengers are more likely to emerge when incumbents do less well in terms of previous vote share ([Bianco, 1984](#); [Jacobson, 1989](#); [Krasno & Green, 1988](#); [Squire, 1989](#)). As Krasno and Green note, “[T]he cost of a tight election for

an incumbent is the increased probability of facing an even tougher challenger (if possible) the next time around, in turn leading to another close call, or worse” (1988, p. 932). Thus, previous incumbent vote share is critical to potential entrants because it both reflects incumbent strength and district partisanship ([Adams & Squire, 1997](#); [Kazee, 1983](#); [Maisel & Stone, 1997](#)).

Furthermore, Bianco finds that challengers are more likely to emerge from the in-party when the economy does well and challenges are more likely from the out-party when the economy does poorly (1984). Finding that national events drive House entry parallels Jacobson's work on candidate emergence and strategic challengers (1989). Jacobson finds that more qualified candidates are likely to run when the national conditions favor their party, specifically when personal income or presidential popularity change ([Born, 1986](#)). These results are particularly important given that Jacobson finds clear evidence that quality challengers are more likely to lead to incumbent defeats. In Senate elections, a weaker relationship has been found between entry decisions and national political and economic factors ([Lublin, 1994](#); [Stewart, 1989](#)), perhaps resulting from the longer time period between elections.

While potential challengers react to the national political environment and the incumbent's political strength, the focus here is on the role of incumbent ideology on entry decisions. Overall, the relationship between challenger entry and incumbent ideology has received relatively limited scholarly attention. The chief finding, from [Bond et al. \(1985\)](#), discovers a moderate effect for ideological distance in terms of promoting potential challenges. Their work found that previous incumbent percentage and district partisanship both strongly predict an incumbent facing a quality challenger but that ideological distance played a more modest role. Members further from the district's median ideology were more likely to face better financed and more qualified challengers, although not necessarily more politically experienced candidates. Conversely, looking at the Senate, [Adams and Squire \(1997\)](#) find that incumbent ideology does not play a major role in an incumbent senator facing a quality challenger.

While [Bond et al. \(1985\)](#) do not find that greater ideological distance leads to an increased probability of facing an experienced opponent, they do find that when incumbents are out of step with their districts' voters, they increase their likelihood of facing a stronger opponent. This strongly suggests that higher quality opponents react to the relationship between an incumbent's ideological position and the district's political characteristics.

## 3. Expectations

Fundamentally, this piece incorporates ideology into the Jacobson and Kernell candidate entry framework (1983). Their model describes the likelihood of entry as based on the probability of victory, the value of the seat in question, and the cost of the election ([Black, 1972](#)). Central to the current analysis is the idea that incumbent ideology and its congruence with district ideology has the potential

<sup>1</sup> Throughout this paper the word district will be used to denote the politics that elect members of the House and Senate. While Senators get elected at the state level and House members at the congressional district level, referring to the units that elect members as districts/states or electoral units seemed less clear than referring to all units as districts. In other words, this paper will use district in a general way to mean a geographically bounded political unit, rather than specifically a congressional district.

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