

## *Explaining Welfare Benefits in the South: A Regional Analysis*

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This study examines whether the contemporary South can still be considered a meaningful political region by analyzing the political distinctiveness and political cohesion of the region. Political distinctiveness refers to the extent to which the states in the region are different from the rest of the country in relevant political characteristics. Political cohesion refers to the extent to which the states in the region are similar to each other in relevant political characteristics. We find that for presidential and congressional voting, the South is at least as political distinctive now as it was in the 1980s, but the cohesion of the region has declined, at least for presidential voting. The ideological distinctiveness of the South, for both political elites and the mass electorate, also has not diminished since the 1980s, but again the ideological cohesion of the states has declined. Finally, the South remains considerably more conservative than the North when it comes to public policy outcomes, although on this dimension both the distinctiveness and the cohesion of the South are lower now than in the 1980s.

A frequent and recurring question in the study of southern politics is whether the South remains a unique and distinct political region. There is no doubt that this was the case for much of the 20th century, which made the study of southern politics interesting and relevant. However, the growth of genuine two-party competition, the changes in underlying partisan cleavages, and the economic and social transformation of the South during the post-civil rights era have changed the region so much that some have questioned whether it is still meaningful to consider the South as a region that differs significantly from the rest of the nation. The question addressed by this study is a simple one: to what extent is the contemporary South a meaningful political region and one that has unique defining characteristics? This is a recurring question in the literature on southern politics, and different scholars have provided different answers, depending on the regional characteristics that they analyzed (Beck and Lopatto 1982; Cooper and Knotts 2010b; Prysby 1989; Rice et al. 2002; Steed and Moreland 1990). This study attempts to contribute to that debate.

Investigating this question requires us to consider the criteria for defining a political region. The first premise of this study is that a region must be constructed from a set of contiguous states, and each state must be entirely in or out of the region. For example, if Virginia is considered part of the South, all of Virginia must be part of the region. Parts of northern Virginia

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cannot be excluded from the region, even though they might not be very “southern” in some respects. There are several reasons for this restriction of the definition of a political region. First, many of the variables that are commonly used to characterize a region, including ones that we use in this study, are attributes of states as a whole. Presidential electors, U.S. Senators, and governors, among others, are elected statewide. Public opinion data are typically available for a state, but rarely for each small portion of a state. State policies, such as taxation or spending policies, apply across the entire state. Second, the South normally has been defined as comprised of whole, contiguous states, usually the eleven states of the old Confederacy, so this principle maintains consistency with past practices.<sup>1</sup> Finally, allowing regions to be defined without regard to state borders introduces a level of complexity to drawing regional boundaries that is beyond the scope of this study.

A second premise of this study is that two factors should characterize a political region: political distinctiveness and political cohesion. Distinctiveness refers to the extent that the region differs from the rest of the nation in relevant political characteristics. If a set of contiguous states currently is no different from the nation in its salient political features, then it is hard to see why we should refer to the set of states as a meaningful political region, even if it made sense to do so at some point in the past. The greater the political distinctiveness of a region, the more significant it becomes as a political region. Distinctiveness is not the only important aspect. Political cohesion also is relevant. Cohesion refers to the similarity among the set of states in relevant political factors. The more similar that the states are to each other, the more meaningful it is to consider them a political region. Conversely, if a group of contiguous states is extremely heterogeneous in its political and social characteristics, then it seems problematic to consider them as a meaningful political region. Note that cohesion refers to differences between states, not within states. There may be great political diversity within each state, but if the states are similar overall to each other in salient characteristics, then there is high cohesion. Taken together, distinctiveness and cohesion are important criteria for ascertaining whether a set of contiguous states is worthy of being considered a region. If the states are very similar to one another and very different from the rest of the country, there is good reason to refer to these states as a distinct region. If the states do not differ very much from the rest of the country, and if the states are highly dissimilar, then there is little justification to call them a meaningful political region.

There is no doubt that the South described by V.O. Key was high in both distinctiveness and cohesion on a great many variables—the strength of the Democratic Party, the significance of race as a political issue, the low level of political participation, and the lack of economic development, to

name a few (Grantham 1988; Key 1949). The South of the civil rights era also was clearly high in distinctiveness and cohesion, in large part because these states were undergoing enormous political and social changes that other states were not (Bartley and Graham 1975; Bass and Devries 1976; Black 1976). The same could be said about the first two decades of the post-civil rights era (Black and Black 1987, 2002; Lamis 1984). In the twenty-first century though, the pace of change in the South has subsided, and while regional differences remain, perhaps they are not as dramatic as those of years past. Moreover, the political and social changes that have taken place in the region have been uneven, leading some analysts to see more regional diversity now (Brown and Bruce 2010; Hood and McKee 2010; Knotts 2009; Woodard 2006). The question then is how different the southern states currently are from the rest of the nation and how similar they are to one another.

The political distinctiveness and cohesion of a region can be measured on several dimensions. One obvious dimension is electoral. How different from national patterns are the electoral patterns in the region, and how similar are they across states in the region? A second possible dimension is the political culture, especially the ideology of elites and citizens, as measured by survey and other data. How different is the profile of political attitudes in the region from the national pattern, and how similar is the profile across the states in the region? Specifically, how much more conservative is the South compared to the nation and how ideologically similar are the southern states? A third possible dimension is public policy. How does state public policy in the region differ from national patterns, and how similar are policies across the states in the region. These concepts can be applied to the South, defined as the eleven states of the old Confederacy. Furthermore, we can examine data over time to see how political distinctiveness and cohesion have changed in the past few decades. The time period that we examine in this study is roughly from 1980 to the present (the exact years vary a little, depending on the variable). Following Reagan's election in 1980, Republican growth in the South was more steady and consistent. While there clearly was Republican electoral success in the 1970s, it was more uneven and erratic.

### **Electoral Patterns**

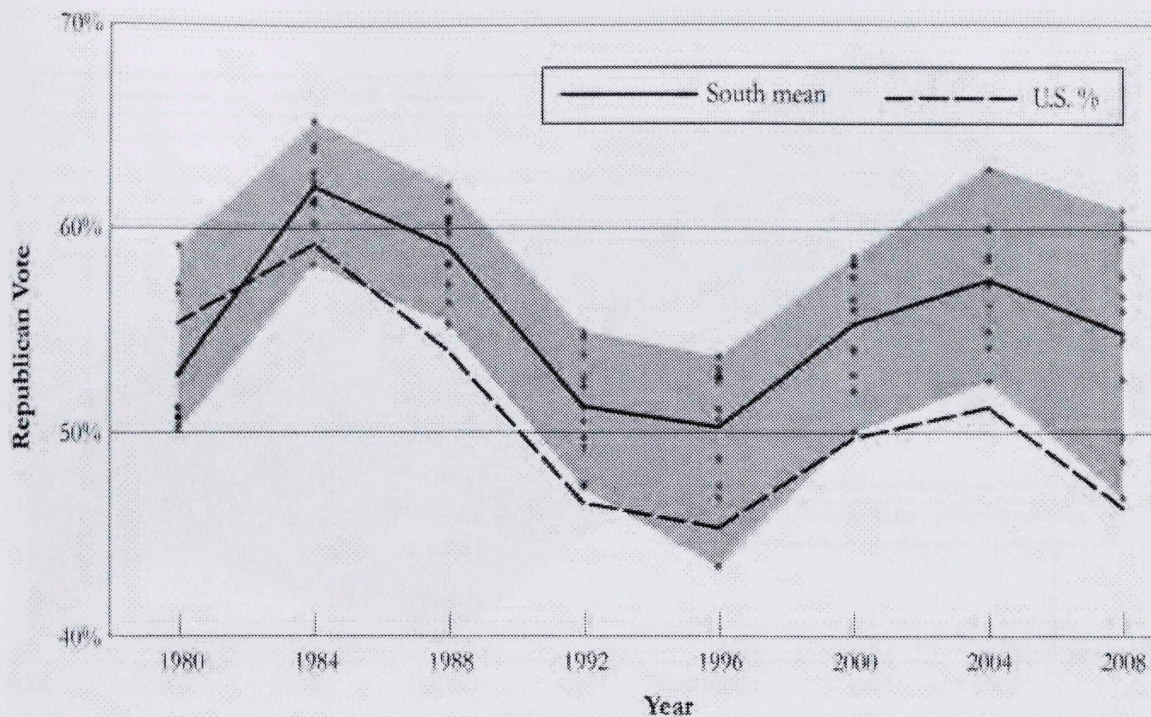
A logical starting point for this analysis is with patterns of presidential voting, which have been extensively analyzed by scholars of southern politics (Black and Black 1992; Kapeluck et al. 2010; Moreland and Steed 2012; Scher 1997; Stanley 2006). One reason for the scholarly focus on presidential elections is that Republican growth in the modern South emerged first at

the presidential level and then spread to lower levels (Aistrup 1996; Bullock 1988; Lublin 2004). Figure 1 shows the Republican percentage of the two-party vote for each presidential election from 1980 through 2008, adjusted for home state effects.<sup>2</sup> Each state is plotted on the chart, and the grey area indicates the range of scores for the southern states. This range can be termed the vote spread, which is one measure of southern regional cohesion. Also plotted on the chart are the mean percentages for the South and the nation. The distance between these two lines, which is the difference between the mean for the southern states and the national vote percentage, is our measure of political distinctiveness. The national percentage includes the South, so the difference between the South and the North (the term “North” is used synonymously in this article with non-South) is greater than the distance between the two lines. The reason for using the national percentage, rather than the percentage for the non-South, is that doing so allows us to measure the political distinctiveness of other regions against the same national benchmark, something that will be done shortly.

The political distinctiveness of the region increased from 1980 to 1988, then leveled off in the 1990s (even declining a bit), but then increased again to 5.6 points in 2000, to 6.4 points in 2004, and to 8.5 points in 2008. Even though Obama carried three southern states, the South was more Republican than the nation in presidential voting in 2008 than in any other year in the post-civil rights era. At the same time, regional cohesion, measured either by the spread or the standard deviation, has declined in recent elections, with 2008 displaying a significantly larger spread than previous years. In 2008, the Republican percentage of the two-party vote ranged from 46.8 percent in Virginia to 60.9 percent in Alabama, a spread of over 14 points, compared to just over 10 points in 2004, the next lowest year in cohesion. In contrast, the spread never exceeded 7.6 points from 1984 to 1992. Another measure of cohesion, the standard deviation of the presidential vote, also shows an increase over time, especially for 2008, when it reached 4.83.<sup>3</sup>

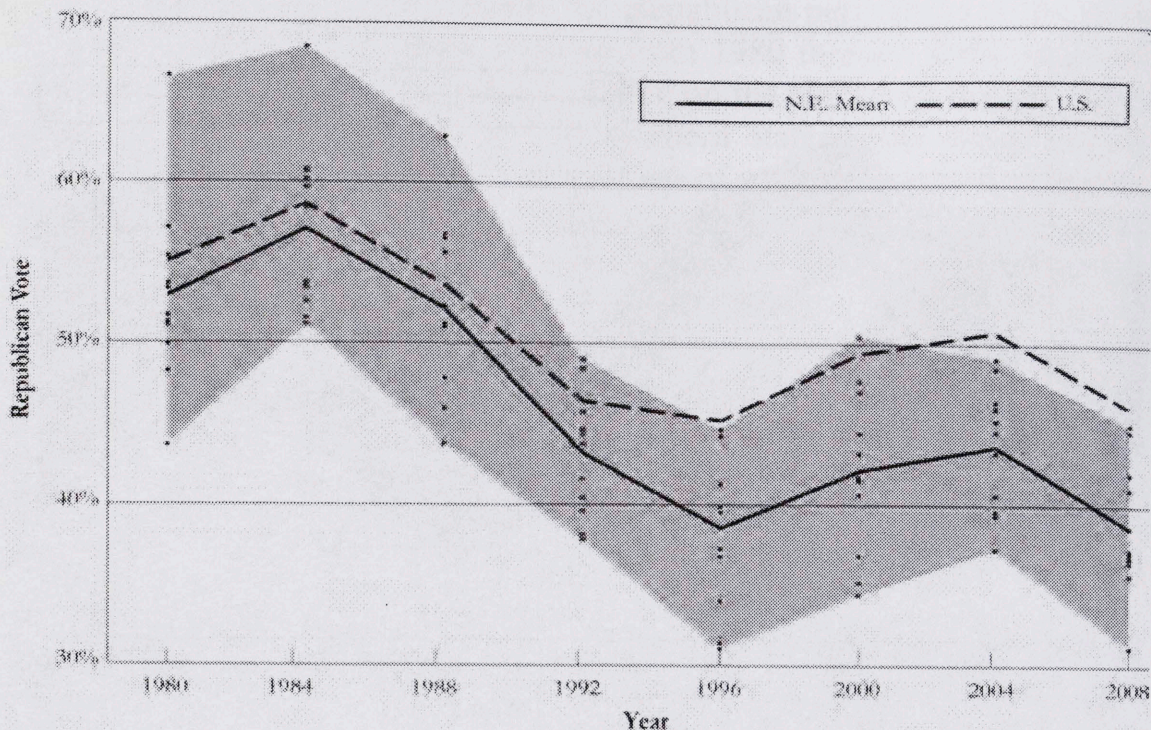
The decrease in regional cohesion could represent a variety of patterns. The simplest pattern would be that the states that had already been either the least or the most Republican in the region moved even further from the southern mean. That turns out not to be the case. The states that were the most Republican in 2008 were often not that way earlier. For example, Florida and Virginia were among the most Republican states in the 1980s, yet both were carried by Obama in 2008. Similarly, Arkansas and Louisiana were among the least Republican states throughout the 1980s and 1990s, but they moved to be among the most Republican states in the most recent elections. The increased political heterogeneity of the southern states reflects a complex pattern of change over the past couple of decades. Whether this will continue to be the case is unclear. Perhaps the next two decades will

Figure 1. Southern Presidential Vote, 1980-2008



result in the states that are now the most Republican in the region becoming even more so, while those that are the most Democratic will move even further in that direction. However, past patterns should indicate some caution in projecting future changes.

It might be interesting to compare the South to another region that has undergone considerable change over the past few decades: the Northeast, defined as the eleven states to the north of Virginia and West Virginia and to the east of Ohio.<sup>4</sup> Figure 2 shows the adjusted presidential vote for these states from 1980 to 2008. The change here is almost as dramatic as in the South. The Northeast was less than two points more Democratic than the nation in the 1980s, but in the last three presidential elections, it has been about 7.5 points more Democratic. This makes the political distinctiveness of the Northeast a little lower than that of the South in 2008, which registered an 8.5 point difference, but higher than that of the South in 2000 and 2004. Figure 2 also shows the range of the vote across the Northeastern states from 1980 to 2008. For most of this time period, the political cohesion of the Northeast, measured either by the spread or the standard deviation, has been lower than that of the South. However, cohesion has been increasing in the Northeast, just the opposite of what has been happening in the South, and in 2008, the Northeast was at least as cohesive as the South. This suggests that scholars might pay more attention to the Northeast as a

**Figure 2. Northeastern Presidential Vote, 1980-2008**

meaningful political region, particularly if recent trends in presidential voting continue (Knuckey 2009; Reiter 2010; Reiter and Stonecash 2011).

Presidential voting patterns are an important consideration for the definition of a region, but surely they are not the only relevant factor. Another aspect of electoral patterns that we might examine is congressional voting, which also has been the subject of substantial research into southern politics (Beachler 2000; Black and Black 2002; Bullock et al. 2005; Hill and Rae 2000; Knuckey 2000; McKee 2010; Prysby 1996; Prysby and Watkins 2010; Shafer and Johnston 2001; Whitby and Gilliam 1991). Examining congressional voting requires more care in the data analysis than examining presidential voting, due to the fact that in any given election some congressional seats are not contested by both major parties. If we were to tally up the percent of votes cast for Democrats and Republicans for the U.S. House for each state for a particular election, that figure could be distorted by uncontested seats.<sup>5</sup> The solution to this problem that we adopt is to calculate an adjusted two-party vote for each congressional district, where the adjustment is to truncate the Republican percentage of the two-party vote in each district to run between 20 and 80 percent, and then to calculate the mean Republican adjusted vote for the districts in each state. This is a very conservative adjustment; very rarely does a party fail to win 20 percent of the two-party vote when it contests a U.S. House seat, and it often does much better than that, even with a weak candidate and a minimal campaign effort.

**Figure 3. Southern U.S. House Vote, 1980-2010**

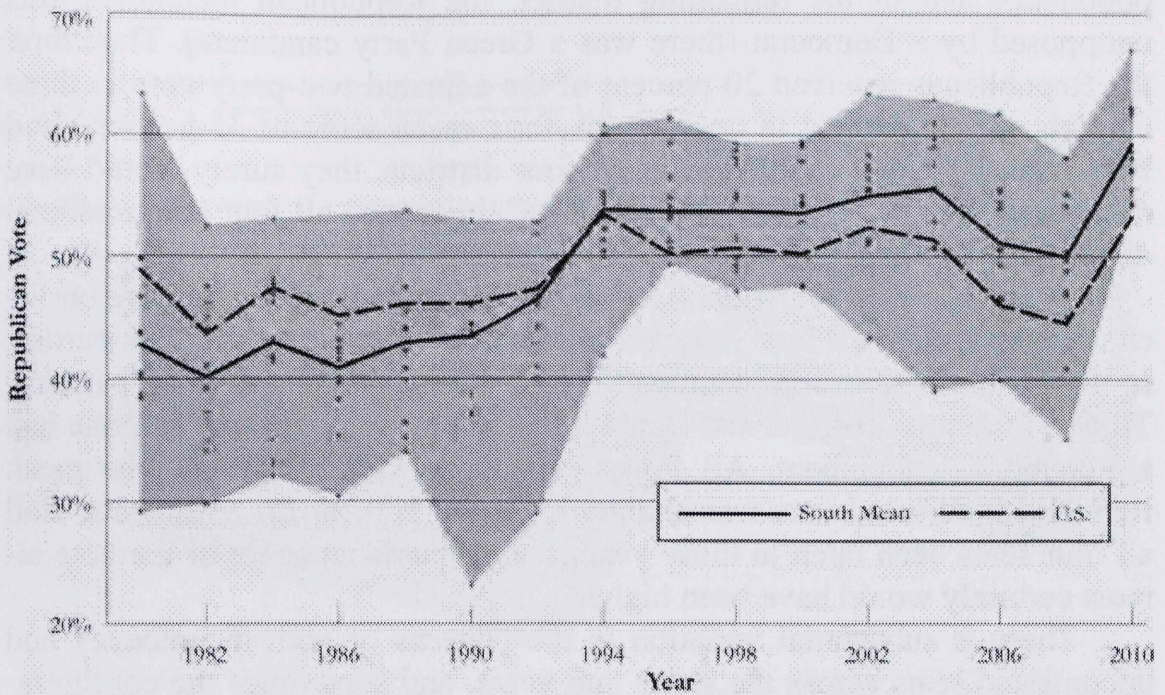


Figure 3 displays the adjusted Republican congressional vote for each southern state from 1980 to 2010, along with the mean for the southern states and the national congressional vote, just as Figure 1 did for the presidential vote. The difference between the two lines indicates the political distinctiveness of the South on this measure. When it comes to congressional voting, the South is not as different from the nation as it is in presidential voting. The regional distinctiveness of the South was less than 6 points in both the 2008 and 2010 congressional elections, compared to 8.5 points for the 2008 presidential election. In earlier years, there also was more southern distinctiveness in presidential voting than in congressional voting. However, there has been some growth in distinctiveness of the congressional vote, and there also has been a shift in the direction of distinctiveness, with the South being clearly more Republican after 1994, whereas it was more Democratic prior to 1994.

The pattern for cohesion in congressional voting is less clear. It decreases in the early 1990s, then increases until 2010, when the spread drops to about 10 points, compared to over 20 points in 2008. A closer look at the data reveals two reasons for this unstable pattern: (a) uncontested seats, even though they have been adjusted for, explain much of the fluctuation in the spread of the vote; and (b) incumbency, which is related to whether seats are contested, explains most of the rest. For example, consider Arkansas in 2008, a year in which Arkansas was the most Democratic southern state on the chart. In three of the four districts in Arkansas, the Democratic

incumbent was unopposed by a Republican (two did have a Green Party opponent), and in the remaining district, the Republican incumbent was unopposed by a Democrat (there was a Green Party candidate). Therefore, the Republicans received 20 percent of the adjusted two-party vote in three districts and 80 percent in one district, for a mean score of 35 percent. Had Republicans fielded candidates in all four districts, they surely would have done much better, especially because McCain carried all four congressional districts in 2008.

In 2004 and 2006, Arkansas also was the most Democratic state on the chart, even though all four Arkansas districts were contested by both parties. In these years, the strong Democratic vote was due to incumbency patterns. Three of the four districts had Democratic incumbents running, and one had a Republican incumbent. All four incumbents won easily, and the mean Republican adjusted vote was slightly under 40 percent for both years. Had all four seats been open in those years, the Republican share of the vote almost certainly would have been higher.

There is substantial variation in the patterns of both incumbency and uncontested seats across the states and years, and sometimes the configuration of incumbency and uncontested seats for a given state in a particular year produces a lopsided two-party vote, whereas in other years the configuration of incumbency and uncontested seats results in a more even two-party vote, even though the underlying partisan nature of the state remains constant. The result is a substantial degree of instability in cohesion due to idiosyncratic factors, thus making it difficult to come to a clear conclusion about trends in regional cohesion for the congressional vote.

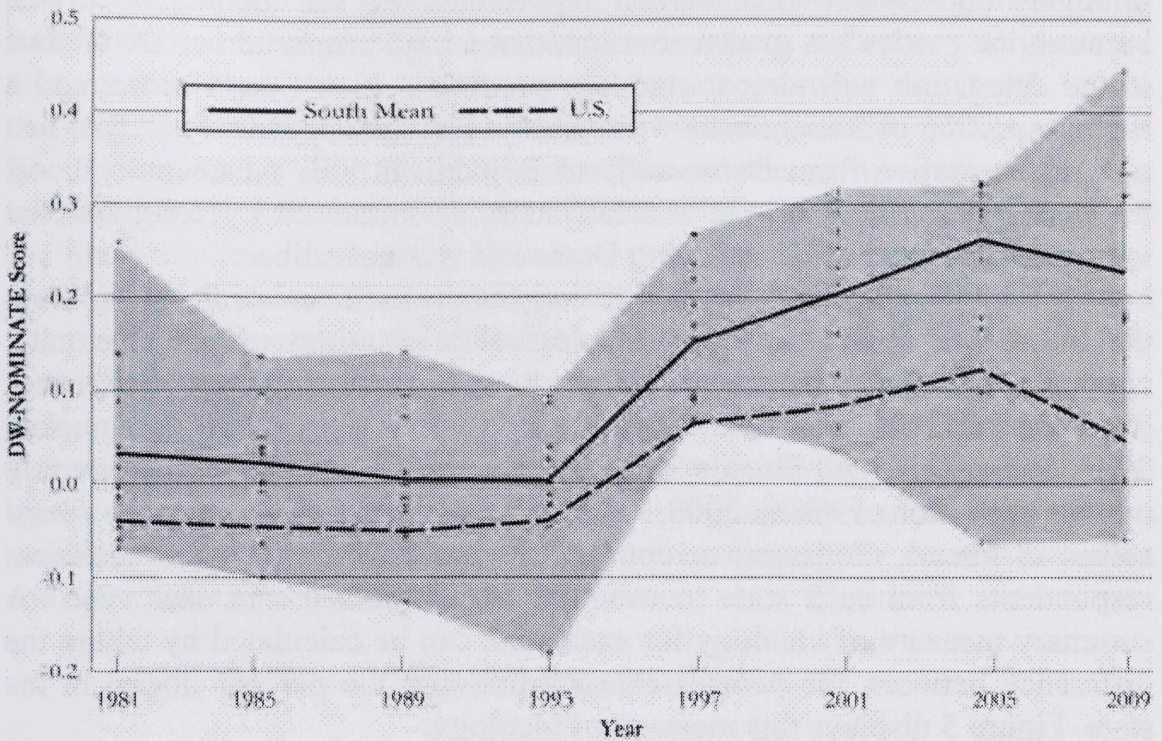
### **Ideological Patterns**

While examining electoral patterns for U.S. House elections may be interesting, it might be more revealing to analyze the ideological tendencies of the southern representatives. After all, prior to 1994, the Democratic congressional vote in southern states exceeded the national average, but a significant share of that vote went to more conservative Democrats (Berard 2001; Rae 1994). To measure the ideological tendencies of southern congressmen, we use DW-NOMINATE scores (obtained from Carroll et al. 2011). A more positive score represents a more conservative voting record.

Figure 4 presents the average DW-NOMINATE score for each of the southern states for each year following a presidential election, from 1980 to 2008. This choice of years is based on the assumption that the first year of a new administration is likely to be a good reflection of ideological tendencies. The solid line represents the mean for all representatives, not the mean for the states, so it is less affected by fluctuations in the composition of the



Figure 4. Ideology of Southern U.S. House Delegation, 1981-2009



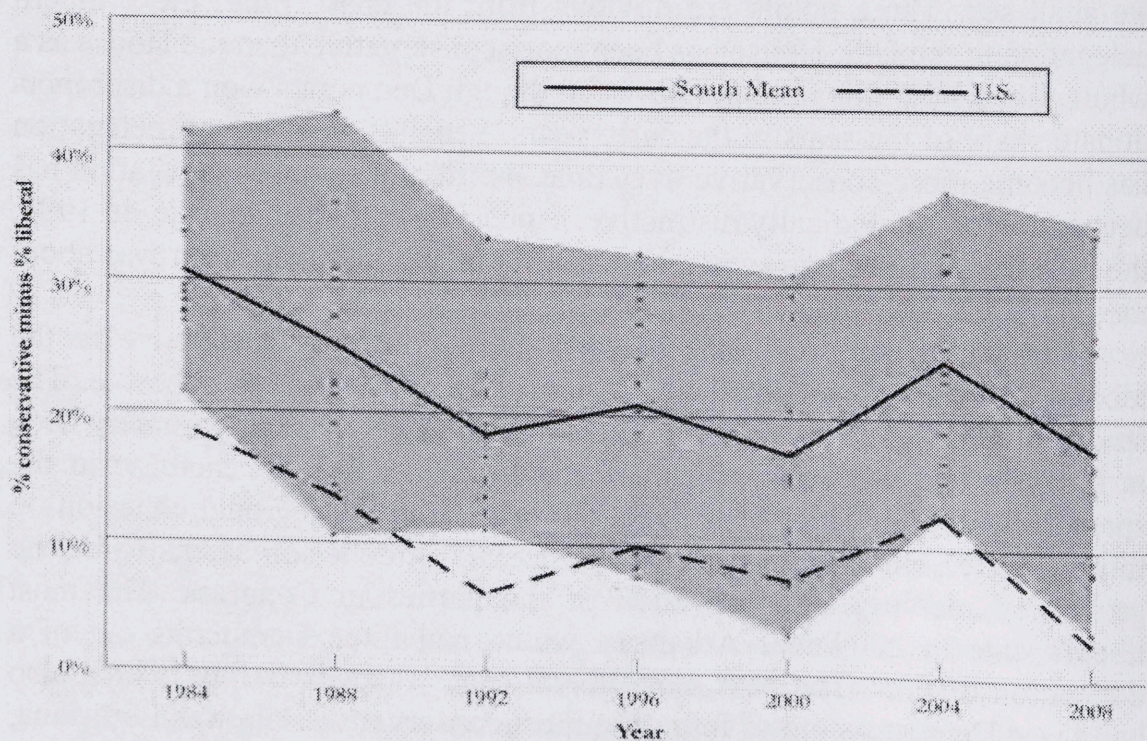
delegations from very small states, which can display unstable patterns, as we shall see. Three points are obvious from the chart. First, the southern delegation to the U.S. House has been more conservative than the House as a whole throughout this time period, even though Democrats won a disproportionate share of the seats in the early years. Second, the southern delegation has become more conservative over time. Third, the southern delegation has become more ideologically distinctive, especially in the last decade. In 1996, the difference in average scores between the South and the nation was about .08; in 2009 it was about .21.

But while the South has become more politically distinctive in the ideology of its congressional delegation, it has become less cohesive. The spread in ideological scores of the state delegations has been extremely wide in the past two elections, and there has been a noticeable increase in the spread after 1997, which represents the high point for regional cohesion on this measure. The explanation for the decline in cohesion seems to be the growth of ideological polarization of the parties in Congress. The most liberal state in 2009 was Arkansas, which had three Democrats out of a delegation of four. The next most liberal state was Mississippi, which also had three Democrats out of four. The most conservative state was Louisiana, which had six Republicans out of seven representatives. The ideological character of the state's congressional delegation is greatly influenced by its

partisan composition, much more so than in the past. Even if the state has relatively conservative Democratic representatives, the ideological divide between the parties has grown so much that a high proportion of Democrats in the delegation will almost certainly produce a high liberal score, and a high proportion of Republicans will result in just the opposite. A shift of just one representative from Democratic to Republican will substantially boost the conservative tendency of a small state, as measured by congressional voting scores, even if the departing Democrat was not a liberal.

In addition to examining the ideology of the members of Congress from the South, we also look at the ideological orientations of the electorate, another area where a number of studies have examined regional differences (Cotter et al. 2006; Cotter and Stovall 1990; Knotts et al. 2005; Knuckey 2001; Schreckhise and Shields 2003; Shaffer et al. 2000). To do this, we rely on exit polls from 1984 to 2008, which asked respondents to classify themselves as liberal, moderate, or conservative, and which included sufficient respondents from each state to calculate a reliable score in each case.<sup>6</sup> A summary measure of ideology for each state can be calculated by taking the difference between the percent conservative and the percent liberal in the state. Figure 5 displays this measure of ideology.

**Figure 5. Ideology of Southern Electorate, 1984-2008**



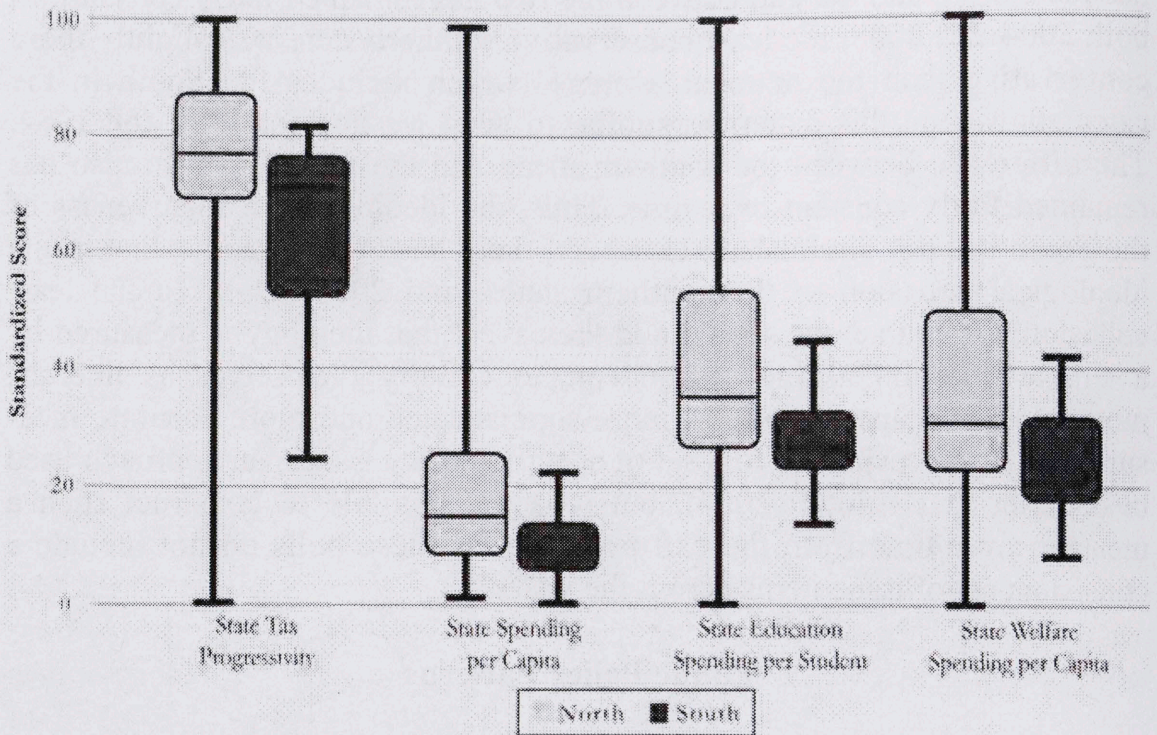
The southern states have become less conservative over time, but so has the nation, and the gap between the two has remained fairly constant. In both 2004 and 2008, the least conservative southern state was slightly more conservative than the national average (which includes the South in the calculation), and this pattern is similar to what we find for 1980 and 1984. The difference between the southern mean and the national mean also has remained fairly constant over time. Thus, the ideological distinctiveness of the South has not diminished. However, there has been some decline in the ideological cohesion of the southern states, and 2008 displayed the least cohesion. Of course, we should add the caveat that ideology is measured by a simple question asking respondents to classify themselves as liberals, moderates, or conservatives. A more sophisticated and more accurate measure would use responses to a set of specific policy issues, an approach used by Cooper and Knotts (2004), but it is not possible to construct such a measure over time from the exit poll data, as these polls do not include a consistent set of issue items across the years.

### **Public Policy Patterns**

If the southern states truly are more conservative, then we might assume that this would be represented in their public policies (Cooper and Knotts 2004). We chose four policies to examine: the progressivity of state and local taxes, total state and local government spending per capita, spending per student on public education, and welfare spending per capita. Each of these variables has a different range, and the first is not even measured in dollars, so we converted each variable to a 0 to 100 scale, where 0 represents the most conservative state score and 100 the most liberal score. Figure 6 displays boxplots for the South (in dark grey) and the North (in light grey). The length of each box shows the range for the middle 50 percent of cases in the group (i.e., from the 25th to the 75th percentiles), and the whiskers show the range for all cases in the group. The solid line in each box indicates the 50th percentile. The general pattern is similar across all four variables. The median southern state would fall close to the 25th percentile among northern states, and the 75th percentile in the South is roughly at the median value for the North. The cohesion of the southern states on the spending variables is fairly high, but there is considerable diversity when it comes to tax progressivity. For the spending variables, the length of the boxes for the South is about one-half of what it is for the North, and the total range is much smaller.

While Figure 6 only displays recent data, we examined the spending variables for earlier years, and some change in the regional patterns has occurred.<sup>7</sup> Regional distinctiveness on the spending variables was somewhat

Figure 6. State Policy Outputs, 2007



greater in the 1980s and 1990s than it is today. For example, three-fourths of the southern states in 1981 had overall per capita spending figures that would place them in the bottom 25 percent of the northern states. In 2007, only one-half of the southern states would be below the 25 percentile in the North, as indicated above. A very similar pattern exists for the change in per capita educational expenditures between 1981 and 2007. The change in welfare expenditures is somewhat less, but still in the same direction: southern states were further below the national average in 1981 than in 2007. Regional cohesion also was greater in earlier years than it is today. In fact, the southern states were remarkably cohesive in both overall and educational spending in 1981. Overall per capita state spending in that year ranged from about \$1300 (Arkansas) to about \$1800 (Louisiana), and per capita educational spending ranged from \$520 (Arkansas) to \$630 (Virginia).

### Conclusions

To sum up these results, the South remains distinct from the North on a variety of political characteristics. It is more Republican in presidential and congressional voting; it is more conservative, both in terms of the ideology of its House members and the ideology of the electorate; and its state policies are more conservative. Moreover, for many of the measures that we

analyze, the political distinctiveness of the South has not diminished over the past three decades. On the other hand, the South appears to be less cohesive now than in the past. Much of this decline in regional cohesion may be the result of economic and demographic changes, which have changed in a very uneven way across the South (Hood and McKee 2010; MacManus 2012). If this diversity within the South increases over the next couple of decades, it will be more important than ever to talk about differences between the southern states.

Furthermore, the concepts of distinctiveness and cohesion can be applied to other regional characteristics than the ones analyzed here. For example, rather than examining the difference between the North and the South in the two-party division of the presidential or congressional vote, as we did here, one might analyze the regional differences in the structure of the vote and in the electoral coalitions of the two parties. In other words, are the factors that influence the vote similar in the North and the South? Some studies have addressed this question and have found that in this regard, the South has become much more similar to the North. The South may be more Republican than the rest of the nation, but the types of people who vote Republican in the South seem to be increasingly similar to the types of people who vote Republican in the North (Buchanan 2009; Prysby 1989; Shafer and Johnston 2006).

On a more general note, this study suggests how regions might be defined and analyzed. The concepts of distinctiveness and cohesion can be applied to other geographical regions, such as the Northeast. The characteristics that we used to measure distinctiveness and cohesion—presidential and congressional voting, ideology of elites and masses, state public policies—can be applied outside the South. It might be interesting to do this more systematically across the nation to determine how the South compares to other regions in terms of the distinctiveness and cohesion of relevant political characteristics.

## NOTES

<sup>1</sup>While the South is most commonly defined by political scientists as the eleven states of the old Confederacy, other definitions have been used. Bullock and Rozell (2010) include Oklahoma. Cooper and Knotts (2010a), using cultural identity, find that Kentucky, Oklahoma, and West Virginia can be considered southern.

<sup>2</sup>The problem with simply using the presidential vote is that some states had a presidential candidate from that state in a particular year, which distorts the vote from what it otherwise would have been. For example, Georgia was the southern state with the lowest Republican vote in 1980 (42.3%), no doubt a result of the fact that the Democratic candidate in 1980, Jimmy Carter, was from Georgia. Similarly, Arkansas was unusually Democratic in 1992 and 1996, when Bill Clinton was on the ballot. To correct for this

distortion, we adjusted the presidential vote to what it most likely would have been if no presidential candidate from that state had been on the ballot. This adjustment was based on how the state stood relative to other southern states in adjacent years. For example, Georgia was only 2.4 percentage points less Republican than the South as a whole in 1984, so the 1980 figure for Georgia was adjusted to be 2.4 points less Republican than the southern average for 1980, thereby giving Georgia an adjusted presidential vote of 51.4%.

<sup>3</sup>The standard deviation for the presidential vote across the eleven southern states was 3.27 in 1980, 1.96 in 1984, 2.07 in 1988, 2.70 in 1992, 3.26 in 1996, 2.94 in 2000, and 3.13 in 2004.

<sup>4</sup>Specifically, the Northeast is defined as: Maryland, Delaware, Pennsylvania, New Jersey, New York, Connecticut, Rhode Island, Massachusetts, New Hampshire, Vermont, and Maine.

<sup>5</sup>For example, if a state has six House seats, and two were not contested by the Republicans in a particular election, then the Democrats would effectively have captured 100 percent of the two-party vote in those two races, thus boosting their statewide percentage of the two-party vote for that election. But if the Republicans had contested those two seats, even with weak and poorly financed candidates, they probably would have won at least one-fifth of the vote, perhaps even more.

<sup>6</sup>We were unable to go back to 1980 for this measure because the 1980 exit poll dataset does not include the respondent's state as one of the variables.

<sup>7</sup>We were unable to obtain data for state tax progressivity back to the 1980s, so the change in the distribution of this variable over time cannot be examined.

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