

*Incumbency is No Advantage:
Michigan's 7th Congressional District*

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Introduction

In the four elections from 2002 through 2008, four different candidates were elected to the United States House of Representatives seat representing the Michigan's 7th congressional district. Such turnover is rare in U.S. House races, where a large majority of incumbents easily win reelection and many districts are not considered to be competitive. In fact, the 7th district is the only one in the nation that has seen this type of turnover in this four-election span. The turnover in representation has occurred even though the district has been considered a leaning Republican district after both the 1992 and 2002 re-districting plans went into effect. The district's turnover in representatives is due in part to the nature of the district and its voters, but also because of the candidates in each election, and a combination of events that began after the 2002 election.

First, Republican Nick Smith was elected from this district in each election from 1992 through 2002. After the 2002 election, Smith announced that he would retire as part of a promise he made during his first campaign to serve only six terms. Republican John J.H. (Joe) Schwarz, a moderate Republican former state senator from Battle Creek, beat five other candidates in the 2004 primary, and then won the general election with 58 percent of the vote. The one-term incumbent, however, faced a serious challenge from within the Republican Party ranks in 2006. One of Schwarz's primary challengers in 2004 was former state representative Timothy Walberg, a staunch social and fiscal conservative who was able to oust Schwarz in the 2006 primary and then win a close general election with just 50 percent of the vote.

In the 2008 election, voters in Michigan's 7th district contributed to the Democratic Party's expansion of their majorities in both houses of Congress by electing Democrat Mark Schauer over the one-term Republican incumbent Walberg. There were macro-political and economic factors, along

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with micro-political campaign factors specific to the candidates and the district that helped influence the specific interplay of strategic decision-making made by each candidate, all of which contributed to Rep. Walberg's loss in 2008. In order to better understand how a Democratic challenger beat an incumbent Republican in the 2008 election, we will examine each in turn.

The Michigan 7th U.S. House District

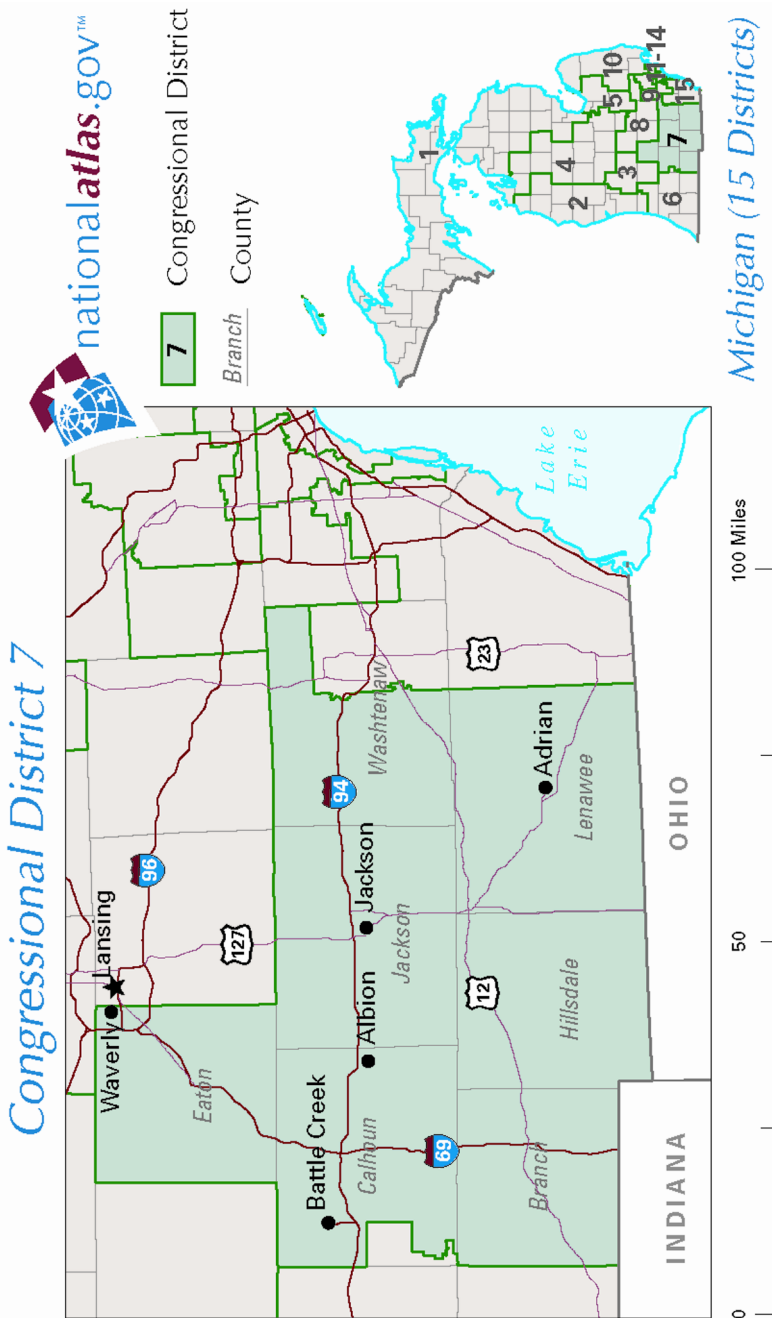
Michigan's 7th congressional district is located in the south-central part of the state. It is largely small-town and rural, so it is not surprising that the district has been considered a Republican district since the 1990s (Figure 1). The district is comprised of all or fairly large parts of seven counties. The district includes three conservative "southern tier" counties—Branch, Hillsdale, and Lenawee—along with the more moderate, but still Republican leaning, Jackson County. Calhoun County, where the city of Battle Creek is located, is a relatively high-population area that is the most Democratic part of the district. Battle Creek is the district's largest city, mostly blue-collar, and home of 2008 Democratic candidate Mark Schauer. The district also includes Eaton County, mostly rural in the past, but moving towards the Democrats as the nearby Lansing-area population has moved further away from the city into the surrounding suburbs and rural areas. Moreover, a large General Motors factory employing about 3,000 workers is located in Eaton County's Delta Township, which further shifted the county towards the Democrats. Finally, a portion of Washtenaw County that includes the near-northern and western areas surrounding the highly Democratic city of Ann Arbor is at the eastern end of the district.

District Characteristics

The latest round of redistricting did not have a major impact on the make-up of the 7th, but it did pick up some voters from western Washtenaw County. This change likely moved the district towards the Democrats a bit, but the character of the district has remained small-town and rural, with enough conservative voters for it to remain a Republican-leaning district. The district has been described by Congressional Quarterly as ". . . small towns, farming communities, and a few midsize cities. . . . Auto parts manufacturing drives small-town economies, especially in Jackson. Outside the cities and towns, expansive fields of soybeans and corn dominate the rest of the 7th, which is the state's leading producer of both crops" (Koszczyk and Angle 2003, 521).

Census data indicate that almost half (46.3 percent) of the district's population lives in rural areas—over twice that of the U.S. as a whole.

Figure 1. The Michigan 7th Congressional District



Almost 90 percent of the district's population is white, with an estimated 6.6 percent black population in 2007. The district's unemployment rate in 2007 was 7.9 percent, with 12.2 percent of the population living under the poverty level.

Despite its distance from the metropolitan Detroit area, many communities in the district have continued to rely on the automobile industry for its economic livelihood. Most of the automotive-related work has featured small-scale auto suppliers and job shops related to auto manufacturing. These small shops include stamping operations, sheet metal fabrication, automobile parts manufacturing, and producing automotive sealants and adhesives. These businesses have been substantially hurt over the past 5-10 years because of the downturn in the automobile industry in the U.S. and specifically in the state of Michigan. Not surprisingly, the area also has been hurt economically in part because of free trade policies such as the 1994 North American Free Trade Agreement (NAFTA), and trade policy's impact on the U.S. domestic auto industry became a major campaign issue in 2008.¹ The most recent economic crisis that became so evident in late 2008 will only create further hardships in the 7th district in the future.

District Politics

The Michigan 7th district has largely been conservative and Republican leaning, given its rural and small town nature. But the district also has a split personality of sorts. It does not appear to have a social, economic, or political cohesiveness that is found in many congressional districts in the U.S. One identifiable component of the district includes the three southernmost counties in the district. Branch, Hillsdale, and Lenawee counties all border Indiana or Ohio, are small-town/rural, and are considered to be the centers of social conservatism in the district. Another component of the district includes the city of Jackson and Jackson County, both of which contain a large Catholic voting bloc and represent a Catholic-based version of conservatism among the district's Republican voters.

In the more moderate and Democratic part of the district, Calhoun County is located in the northwest part of the district, Eaton County is located in the northeast, and the Washtenaw County portion of the district is in the eastern part of the district. However, these are not geographically contiguous areas, nor are they cohesive on economic and political dimensions. This lack of a unified district identity was not necessarily created on purpose through gerrymandering, at least according to some. Former 7th district Representative Joe Schwarz bemoaned the lack of unity in the district, but does not believe the district was drawn that way on purpose. Schwarz noted:

The district has lots of differences both north and south and east and west. . . . This district is not cohesive historically or ideologically. The west part of the district doesn't think about the east part and vice-versa. The district is so bad, I don't even consider it to be gerrymandered. It was put together with scraps from here and there. It's a bunch of leftovers.²

Understanding the 2008 election results cannot be accomplished without examining the earlier district elections—especially the 2004 election. Republican Nick Smith's tenure as Representative would end once he completed his term of office after the 2002 election. In many ways, this decision set in motion a series of events that led to a Tim Walberg versus Mark Schauer contest in 2008. For the 2004 election, Nick Smith tapped his son Brad as his successor. However, six Republicans entered the 2004 primary election. The candidates were considered to be quite conservative (including Brad Smith), except for former State Senator Joe Schwarz—a Republican with moderate bona fides including pro-choice, pro-gay rights, and pro-stem cell research positions. When asked to compare ideology to his five 2004 Republican primary opponents, former Rep. Schwarz said, "People used to ask me how I won that primary. I used to say that there weren't six people in that primary, there were seven. There was me, and there was Attila the Hun, and then there were five guys to the right of Attila the Hun."³ The other candidates split the conservative vote in the 2004 primary, allowing Schwarz to win with 28 percent of the vote. Brad Smith finished with 22 percent. Schwarz then beat organic farmer Sharon Renier (D) in the general election, winning 58 percent to 36 percent. For a Republican, Schwarz did well in counties that were Democratic or trending that way—Calhoun, Eaton, and Washtenaw.

The 2006 Election: An Incumbent Loses in the Primary

Among the conservative candidates in the 2004 primary was Tim Walberg, a nondenominational pastor⁴ and former Michigan state representative from the small town of Tipton, Michigan. Walberg had placed third in the crowded 2004 primary, and ran an aggressive campaign in a head-to-head contest against Schwarz in the 2006 Republican primary as a social and fiscal conservative. He did not hide his opposition to gay marriage and abortion, against amnesty for illegal immigrants, and in support of tax cuts and reduced pork barrel spending. This created a marked contrast to Schwarz's views. Schwarz was supported in the election by robo-calls (automated telephone calls) to voters from First Lady Laura Bush and a district appearance by U.S. Senator John McCain (Schwarz had chaired McCain's presidential primary campaign organization in Michigan in 2000). Walberg beat Schwarz 40 to 35 percent in the 2006 primary, in large part by attacking

Schwarz's positions on social issues and by mobilizing the conservative voters in the district. Schwarz refused to endorse Walberg in the 2006 general election, in part because of the negative advertising against him during the primary campaign.

The Washington, DC-based Club for Growth was a factor throughout the 2006 campaign, providing financial support to Walberg, and sponsoring negative ads against Schwarz in the primary and then again against Democrat Sharon Renier in the general election. Walberg narrowly defeated Renier 50 percent to 46 percent, but spent far more (\$1,260,111) than Renier (\$55,682).⁵ Some later observed that the fact that an underfunded, relatively unknown candidate could come so close to winning suggested that Walberg was vulnerable. Indeed, Ken Brock, an advisor to the 2008 Schauer campaign, put it this way: "Because of his conservative politics, Walberg is a great fit for a Republican primary in the 7th District, but he's a lousy fit for a general election."⁶

The results of the 2006 election made the Democrats look more closely at their prospects for the 2008 election, and by the end of 2007 the 7th district was seen as a prime target for the Democratic Congressional Campaign Committee (DCCC). By this time, the DCCC had 40 GOP-held seats on its list of most vulnerable targets and Tim Walberg was at or near the top. The district fit many of the criteria the DCCC set out for being on the list of target districts, but most important here was the candidate. An important reason for the targeting of the 7th was the 2008 challenger Mark Schauer. While the DCCC did contact Mark Schauer about running in 2008, he argued that his motivation came primarily from the district's constituents. Schauer noted:

The DCCC had periodically recruited me—but I was clear that I didn't want to run for Congress. They had put out feelers in 2006, and then they contacted me again in the 2008 cycle. . . . As I watched Tim Walberg in action establishing a record that was so out of sync with the district and missing opportunities to help people in the district, plus the intensity of requests from constituents in my district, I finally started to listen. I think ultimately, it was more a decision that came because of my constituents more than from Washington.⁷

The Strategic and Issue Environments

The strategic environment at the start of the campaign in the 7th district favored Mark Schauer dramatically, as it did for most Democratic challengers in 2008. In addition to a strong challenger from the opposing party, Tim Walberg would have other considerations to battle than simply a well-funded challenge from a quality candidate. Much like other Republicans

around the nation, Tim Walberg was saddled with a Republican brand that was slumping. George W. Bush had low approval ratings from district voters—he had only 37 percent approval as of February 2008—and would likely be a drag on the rest of the GOP ticket. Nearly 80 percent of district residents said that the nation was off on the wrong track, which is typically bad news for incumbents. More importantly, Walberg's own approval ratings were low. In the same February poll, he was given a positive approval rating by only 39 percent of district residents and 38 percent gave him a negative job approval rating. An incumbent with ratings like these is in for a tough reelection battle.⁸

Early ballot tests did not give Walberg much more to be optimistic about. When respondents were asked who they would vote for in the congressional race had it been held that day, Walberg had an advantage of 51 percent to 40 percent over Schauer. While an incumbent always likes to hear that he or she has support of a majority of voters, at this point, Schauer was relatively unknown in many parts of the district, except his home county of Calhoun. An analyst from the polling firm that conducted the early poll noted the concern the Walberg campaign should have had: "If I were in Tim Walberg's camp, I would have grave concerns at this point that a relatively unknown Democrat in a traditionally Republican district can match up so competitively."⁹

As the fall campaign began after the August primary, the sentiment of the district had not improved much, if at all. Bush was still unpopular with only 24 percent approval and Walberg's job approval numbers actually went *down* to only 32 percent saying he was doing an "excellent" or "pretty good" job; 43 percent said he was doing "just fair" or "poor." Moreover, the ballot test was down to a two point margin. In August, poll results for the ballot test after respondents' heard the candidate biographies, Walberg was doing well (leading 68 to 24) in Branch and Hillsdale counties—his core support in the strong conservative areas—but was leading only 46 to 35 in Lenawee and in the heavily Catholic Jackson County was up by only one point.¹⁰ These poll results certainly validated the ratings by prognosticators such as Charlie Cook and Stuart Rothenberg that the race was a toss up. At the time of this poll, EPIC-MRA pollster Bernie Porn argued that for Walberg to be successful, he would have to go on the offensive and make Schauer the issue.¹¹

The voters of the 7th congressional district cared about one issue during this campaign—the economy and jobs. As we have noted, Michigan was feeling the effects of a weak economy months or even years before the national economic crisis hit in September of 2008. Citizens of the 7th district were watching jobs disappear for years while the national economy was still creating them, and Michigan was the only state with a shrinking GDP in

2006. One report in the *Detroit News* on June 13, 2007 noted that, “Michigan’s one-state recession is now three years old and counting.”¹²

Poll results from February 2008 illustrate this clearly. While the economy became a central issue nationally late in the campaign’s season, it was clear this would be *the* issue in this election a full nine months before Election Day. The next most-often mentioned issues (protecting the country from terrorism and making quality health care available to everyone) were nearly 30 points behind the economy and jobs. All other issues—war in Iraq, family values, education, taxes, and the environment—were considered to be most important by less than ten percent of survey respondents. The importance of jobs and the economy was not constant through the district, however; it was more important in some areas of this split-personality district. In Branch, Lenawee and Hillsdale counties, a majority of poll respondents said the economy was the most important issue, while in Calhoun County less than 25 percent said the same. In Calhoun County, Mark Schauer’s home, protecting America from terrorism was a close second with 21 percent, while in Lenawee County, health care was a second with 23 percent.¹³

Candidate Issues

These data should have been a signal to both candidates as to which issue they should focus their message. Only one candidate was able to really address the worries of the voters during this campaign, however. There was both good and bad news in the poll numbers cited above for Tim Walberg. John Petrocik’s (1996) theory of issue ownership tells us that the different parties “own” certain issues because the public trusts that party to handle the issue better than the other party. The good news was that one of those most-mentioned issues favored Tim Walberg in Petrocik’s categorization of owned issues. According to Petrocik, Republicans have an advantage on foreign and defense policy, of which protecting the public from terrorism is an important piece. Terrorism is also an issue Republicans had used to their advantage in the 2002 and 2004 elections. This might have been an opportunity for Walberg—a portion of the electorate, and a sizable one on his opponent’s home turf, was worried about a solidly GOP issue.

The bad news for Walberg was that the most-cited important issue—the economy—was not a Republican-owned issue. The economy, according to Petrocik, is not a Democrat-owned issue either. Rather, it is what Petrocik calls a “performance issue,” where neither party owns the issue but one party can take out a short term “lease” on the issue based on how the party in power had performed. Clearly, the national electorate had placed blame with Republicans for the declining state of the economy; this was less clear in Michigan, however, because the state’s governor, Democrat Jennifer

Granholm, did not have high approval ratings either. The candidate who could address voter concerns about the economy would be in a better position to win the seat.

Tim Walberg discussed a number of issues during the course of the campaign including energy, social security, and taxes. Some of his television ads also made reference to the economy, but his message varied throughout the campaign. For instance, his early television ads mentioned issues such as energy—including his No More Excuses Energy Act, which he introduced in the House—as well as a vote Schauer made in the state Senate that Walberg said would have allowed adults to send pornography to minors over the Internet. Walberg also tried to use the issue of energy during the summer when gas prices reached a record-high \$4 per gallon. He touted his energy plan in the aforementioned ad, and also made a point of riding his Harley Davidson motorcycle during a week-long campaign tour of the district.

Walberg's ad focusing on energy was the first one the campaign aired and the one focusing on values was the third. Some early ads also mentioned taxes quite a bit. The problem with these ads is that they were not issues the public was concerned about. In the February poll noted above, only seven percent of respondents said promoting morality and family values was their biggest worry and only three percent said the same about keeping federal taxes low. These were Walberg's two biggest bread-and-butter issues. While the February poll was conducted months before Walberg had likely outlined his message and before these ads began to run, the importance of the economy and the secondary nature of the issues he featured only became more entrenched in the voters' minds.¹⁴

The ads focusing on taxes did reference the economy but the focus of the ad was certainly taxes more than the economy. Walberg's ads on the economy went after Schauer for voting to raise taxes during his time in the state Senate. One ad featured the following audio:

Tim Walberg understands the key to a strong economy is keeping taxes down and encouraging business to create jobs. Mark Schauer. He was the deciding vote. The deciding vote for the largest tax increase in Michigan history. Raising income and small business taxes. It's been devastating for the Michigan economy. Schauer wants to raise taxes again. This plant, these jobs, our survival is in jeopardy if we let him.¹⁵

Other ads also featured a link to the economy through a lens of taxes. According to pollster Bernie Porn, the tax issue “was not an issue that resonated. As a matter of fact, most polling showed that Obama was preferred over McCain among those who were concerned about taxes. And when you asked questions testing messages. . . . Democrats were at least even if not running ahead on the tax issue. . . .”¹⁶

Moreover, the Walberg campaign did not focus their attention to taxes until late in the campaign. Schauer advisor Ken Brock argued that the decision by the Walberg campaign to turn to taxes is what made the race competitive in the last two weeks.

The race actually ended up tighter than our polling indicated. And the Republicans saw something in this race that we weren't picking up. . . . Now, I would have never would have predicted a 10-point victory, but I thought we'd be more in the 5, 6, 7, not 2, 3 [point] range. And I think what did it for 'em is that they finally got their message act together in the last two, three weeks . . . on the single message of taxes.¹⁷

Even so, the tax issue was not the best way to connect with voters on the issue of the economy. Pollster Bernie Porn notes that, "People did not think about taxes . . . in the election in terms of their economic fears. Their economic fears were based on their personal fear out of potentially losing their jobs and the uncertainty of what was happening with the financial markets."¹⁸

At the start of the fall campaign, the Schauer campaign tied into the theme Barack Obama was having such success with, noting immediately after his primary victory, "This campaign is about change, and this district is represented by a stubborn ideologue who is a part of the problem, part of why Washington is broken."¹⁹ Schauer worked the Democratic mantra of change into the 7th district by focusing on economic policy, specifically trade policy and vowed to try and alter it if elected to Congress. The Schauer campaign was focused on one issue in most of their communications—the economy and jobs. More importantly, they focused on the issue by framing it in terms of trade, which was an important issue to the district. As we have noted, portions of the 7th district relied heavily on manufacturing jobs as a source of employment. As in many manufacturing areas, the loss of jobs was blamed on trade policy, including the North American Free Trade Agreement.

The NAFTA issue was a common theme in all aspects of the Schauer campaign. It appeared in TV ads as well as other communications, and brought up in debates and other appearances. An exchange in the first debate between the two candidates summarizes each one's issue priorities.

Walberg criticized the business climate in the state, while Schauer said many of the problems were caused by outside factors. "Trade is a major issue that needs to be addressed, NAFTA and China" . . . "It's partly bad choices (by business) and part bad trade policies that must be changed." . . . Walberg said *Inc.* magazine listed Michigan as having the third worst business climate in the country—ahead of only California and New York. He blamed that on high business taxes and an unfriendly regulatory climate.²⁰

Schauer advisor Ken Brock said focusing on the economy and trade was their strategy from the beginning: “. . . from a positive messaging standpoint, [the best strategy we had] was to essentially own the trade and economic issues in the beginning and . . . to not let it go, not to get distracted by other peripheral issues”; in short, “if this is a race about jobs and trade, we win.”²¹ The Schauer campaign adhered to this strategy throughout the campaign and continually hit Walberg (and Republicans generally) on the issue of jobs by talking about trade and outsourcing. In all, Schauer aired eight television commercials, and each one of them mentioned the most important issue to the people of the 7th district—jobs and the economy.

One of Schauer's first ads was a positive ad that introduced him to the parts of the district that were unfamiliar to him and included the following audio:

While Michigan's economy gets ignored in Washington, here in Michigan Mark Schauer is working to turn things around by creating tax incentives and cutting red tape. Mark Schauer is keeping jobs here: 60 new jobs in Brooklyn, 107 manufacturing jobs kept in Homer, 379 aviation jobs in Battle Creek. Our economy has a long way to go, that's why in Congress Mark Schauer will keep fighting to turn Michigan around one job at a time.²²

Schauer also aired attack ads against Walberg by arguing he supported unfair trade deals and outsourcing:

Unfair trade policies are costing us jobs. A recent study reported 319,000 jobs were lost last year alone. Everyone gets that except for Tim Walberg. Tim Walberg and his free-trading buddies think outsourcing has been good for our economy. Maybe we should outsource Tim Walberg. Mark Schauer knows that outsourcing is killing our economy and devastating Michigan families. In Congress, Mark Schauer will fight against unfair trade policies and focus on creating good jobs here.²³

The Impact of George W. Bush

Interestingly, President Bush and his policies were not mentioned specifically by the Schauer campaign. Schauer advisor Ken Brock, noted that the campaign did not do too much to tie Walberg to President Bush:

We did a little bit of that. As I look back there was maybe one ad with that Bush-linkage stuff. But . . . we tended to take it to him on the issues specific [to the district]. We had him on some pretty good quotes on trade, for example. Because he was linked to Club for Growth, we had some pretty juicy economic and trade [quotes] directly from him. So our attack lines on him were not exactly Bush-specific or Bush-generic.²⁴

In a reversal of how campaigns played out across the country, incumbent Tim Walberg proudly touted his allegiance to President Bush throughout most of the campaign. Even as late as October, when it was clear just how big a liability Bush would be to Republicans, Walberg maintained his support of the president. In the debate noted above, Walberg kept up rhetorical support for the Bush administration, especially on Iraq. Walberg argued that the troop surge had worked, resulting in a much more stable country, and that the war needed to be won. Schauer countered that argument with a call for a timetable for withdraw.

Walberg's strong rhetorical support for Bush came with one exception. During the first debate between the two candidates, each was asked how they had disagreed with their party leader in the past. Walberg was quick to give four examples of when he did not follow the president: The Water Resources Development Act, the Farm Bill, No Child Left Behind (NCLB), and the Wall Street Bailout bill. These positions, however, fit with Walberg's ideology—the votes against NCLB and the Wall Street bailout were votes against an increasing role of the federal government—and the votes for the Water Resources Development Act and the Farm Bill were both driven by constituency interests. Walberg did support Bush, but not as much as one might think when it came to casting votes on the floor of the House; he had a presidential support score of only 68 during 2008, down from 84 in 2007 (even in 2007, there were only 68 House Republicans with higher support scores). Rhetorically, however, as we noted earlier, he was quick to stand with the president.

Money in the 7th Congressional District

Both candidates were very well funded for this campaign. In total, Tim Walberg raised \$2,021,793, while Mark Schauer brought in \$2,198,909 in contributions. According to the Center for Responsive Politics, this marked one of only 14 races where the challenger candidate outraised the incumbent.²⁵ Walberg ended the 2006 cycle with \$37,961 in cash on hand; he raised another \$266,772 by the time Mark Schauer decided to enter the race in August of 2007. At that point, Walberg had a fundraising lead of \$240,784 on Schauer. In this case, Walberg did not do the first thing that incumbents need to do to protect their seats—raise early money. Normally, incumbents' war chests scare off potential challengers because they can be almost insurmountable. This was not the case with Schauer, however. First, the lead that Walberg had was not as daunting as that faced by other challengers. And second, Schauer quickly made up ground. In fact, in every fundraising period after he entered the race, Schauer outraised Walberg (see Table 1).

Table 1. Schauer and Walberg Fundraising Totals by Quarter

	Year-end report (January 1 – December 31)	April quarterly report (January 1 – March 31)	Pre-primary report (April 1 – July 16)	October quarterly report (July 17 – September 30)	Post-general report (October 1 – November 24)
Mark Schauer					
Fundraising this period		\$323,349	\$ 419,504	\$ 428,054	\$ 301,827
Fundraising to date	\$561,376	884,850	1,303,345	1,731,399	2,198,909
Cash on hand	501,563	751,359	928,686	856,148	21,716
Tim Walberg					
Fundraising this period		264,895	363,441	309,541	365,990
Fundraising to date	557,756	822,651	1,186,093	1,495,635	2,021,793
Cash on hand	438,005	604,466	855,137	691,635	46,812

Source: Federal Election Commission

By April of the election year, Schauer had shown himself to be a serious candidate and threat to Walberg simply by raising the amount of money he did. The early returns on Walberg's fundraising were not so optimistic. By the end of 2007, Schauer was ahead of Walberg in dollars raised and cash on hand. David Wasserman of the nonpartisan Cook Political Report warned that for Walberg, "that's not a good omen at the beginning of the year" and that "Walberg should be doing better than he is right now. At this point, most freshmen have raised considerably more money, even those in noncompetitive districts."²⁶ Walberg did step up his fundraising pace making the total dollars raised by the candidates nearly equal.

Both candidates raised money from political action committees (PACs) and individuals in roughly equal ratios. Walberg's single biggest donor was Club for Growth, with contributions totaling over \$153,000.²⁷ This should be no surprise since Club for Growth had such an important role in electing Walberg to Congress two years earlier. Former Michigan gubernatorial candidate Dick DeVos' company, Alticor, and its employees gave Walberg another \$13,300; a litany of other PACs provided the maximum \$10,000 in contributions. A long list of labor groups and traditionally Democratic groups (e.g., NARAL) were top contributors to Mark Schauer's campaign. However, the single biggest source of Schauer's money was ActBlue, a Web site which funneled nearly \$400,000 to his coffers by allowing donors to bundle their contributions together.

Candidate Spending in the 7th District

These fundraising successes allowed both candidates to do nearly everything they would have liked from a tactical standpoint. The Walberg campaign spent nearly \$1.3 million on paid electronic media (TV and radio). Walberg also spent over \$270,000 on direct mail—this sum combines funds spent for fundraising solicitations as well as persuasion mail. These figures are much higher than the average candidate in congressional elections who spends only about 56 percent on communication (Herrnson 2008). Another large chunk of money (\$154,000) in the Walberg campaign budget was spent on outside consultants,²⁸ while only a relatively small amount was spent on staff inside the campaign (FEC records show only two paid staffers throughout the campaign with total payments of \$31,000). Over \$50,000 was spent on voter lists and data, presumably to help the campaign target voters with mail pieces.²⁹

The Schauer campaign was also able to spend large sums to develop and communicate its message. Nearly \$125,000 was spent on research to help develop the candidate's message in the form of polling and opposition research. Another \$12,000 was spent on voter lists and data that could help

identify important target groups within the district. Communication, however, took up the largest share of the budget. Over two-thirds of the Schauer campaign's total budget was spent on paid electronic media (TV and radio). Moreover, almost \$67,000 was spent on direct mail and other printed materials that would also spread the candidate's message. The Schauer campaign also paid over \$250,000 to staff in the district (including health care benefits) as well as over \$35,000 in consulting fees.

An important strategic point about this district that helps explain the large sums spent on electronic media is the nature of the media market coverage of the district. To advertise to all potential voters, the campaigns had to buy time on broadcast networks in four separate media markets, three of which contained only small portions of the district. Roughly 40 percent of the district is covered by the Lansing / Jackson media market, the other 60 percent of the district is covered by the Grand Rapids / Kalamazoo / Battle Creek (25 percent), Detroit (15 percent), and Toledo, Ohio (10 percent) markets. This creates quite a fractured district in terms of media markets and poses a problem for the campaigns. In order to cover the district with broadcast television, campaigns would have to buy time on network affiliates in all four markets, at least two (Detroit and Toledo) of which are very inefficient in that huge numbers of viewers in those markets are not even eligible to vote for their candidate.

The nature of the media markets in this district made it so that campaigns had to make very difficult decisions on where and how to spend their money. Even with over \$2 million for a congressional race, every penny mattered. For instance, the Schauer campaign decided not to buy time in the Detroit media market, which would have covered western Washtenaw County, the part of the district that included the suburbs of Ann Arbor. According to Schauer advisor Ken Brock, the nature of the media market matrix created some difficult choices that had to be made:

You really have to run four different campaigns. The mix of your media and how long you can be on the air and in the mailboxes . . . in the Lansing / Jackson media market is different than in the Grand Rapids media market. We never went on broadcast TV in Detroit, we did for a very short time in the Toledo market and so that impacts your direct mail budget in each of those media markets. . . . Obviously, if you are doing a lot of broadcast TV you don't have to do quite as much direct mail, and in places where you can't do broadcast TV you are doing more direct mail.³⁰

The decision not to go on the air in the expensive and inefficient Detroit media market was likely driven by the nature of the voters in that part of the district—recall Ann Arbor is a heavily Democratic area—and the fact that the campaign felt it had enough coverage in their mail.

Outside Money Pours into the District

The 7th district has a history of outside money playing a part in congressional elections; recall that the Club for Growth spent over \$1 million in 2006 to help Tim Walberg defeat Joe Schwarz in the GOP primary. The 2008 campaign was no different, as many different outside groups dropped money into the district. In fact, the Michigan 7th saw the fifth largest amount of outside money spent during this cycle.³¹ The Club for Growth again was involved in the 7th, as in the first part of October, the group went on the air with an ad buy of roughly \$175,000 in the Lansing market and on cable TV that attacked Schauer's record on taxes.³² The Club's entrance into the race may have actually *hurt* Walberg, as this was the one thing that former Rep. Schwarz said would make him cross party lines and endorse Schauer, which he did. In addition, National Right to Life spent about \$20,000 on a mail piece for Walberg, and the National Rifle Association spent about \$10,000 to support Walberg.³³

On the Democratic side, there was a good deal more outside money. The American Federation of State, County and Municipal Employees (AFSCME) spent roughly half a million dollars on ads opposing Walberg. Interestingly, the ads went after Walberg on his main issue of taxes by claiming that Walberg voted to keep a tax loophole for "Wall Street Fat Cats" rather than tax cuts for 22 million families, and creating a tie between Walberg and donations from individuals from Goldman Sachs and Merrill Lynch.³⁴ Patriot Majority Midwest, a left leaning 527 committee, spent nearly \$300,000 opposing Walberg for his vote on a bill in the House on the Head Start educational program.³⁵ Health Care for America Now! (HCAN) also spent \$475,000 on ads critical of Walberg.³⁶

The presence of outside groups is not always a benefit for the candidates they are trying to help. Sometimes, the message of the outside group does not mesh with that of the candidate and it is a distraction from what the campaigns want to discuss (Gill 1998). This was particularly true from the perspective of the Walberg campaign. According to advisor Ken Brock:

On our side there were times where I had frustration, quite frankly. . . . We were driving one message and they were off doing other stuff. . . . HCAN . . . had a beautiful health care message attacking Walberg, but it wasn't quite dead on message because we were trying to drive jobs and trade and they were talking about health care. . . . It helped . . . but it wasn't spot on.³⁷

This frustration stems from the rules that allow these groups to spend unlimited funds advocating for or against a candidate. Namely, if a group is going to make independent expenditures, they cannot coordinate or have any

contact with the campaign. As Brock notes, his frustration came from his team not being “on the same page.”³⁸

Large sums were spent by both Hill Committees—the Democratic Congressional Campaign Committee (DCCC) and the National Republican Congressional Committee (NRCC). The DCCC spent \$1.7 million in support of Schauer while the NRCC spent \$1.4 million. The NRCC invested a great deal in trying to keep Walberg in his seat only to pull their funding in the last weeks of the campaign. Even after pulling their funds, Walberg was one of only four GOP House candidates who received more than \$1 million in help from the NRCC and ended up second in total support from the party.³⁹ While the DCCC spent a lot in the 7th, they spent large sums elsewhere as well—Schauer was only one of 35 Democrats that received more than \$1 million in party aid—which illustrates the large advantage in fundraising Democrats had nationally. A full accounting of the total funds spent shows that when all was said and done, between the candidates’ funds, outside groups’ independent expenditures, and party committee spending the campaigns were on roughly equal in terms of spending with roughly \$5.5 million being spent on both sides for a total of \$11 million.⁴⁰

Impact of the Presidential Race

For the last several presidential election cycles, Michigan has been one of the “battleground” states that the presidential campaigns targeted with resources including money, volunteers and staff, and candidate visits. These important resources can bring paid media campaigns that spread a party message, workers for get-out-the-vote efforts and other mobilization activities close to election day, and enthusiasm for the party’s base. Voters in Michigan were set for the more of the same—wall-to-wall television ads from the presidential campaigns and frequent visits by the candidates—in 2008. The candidates in congressional races around the state, including the 7th congressional district, were hoping to benefit from the presence of their party’s standard bearer.

For much of the summer and into the fall this was the case. Both campaigns were on the air in many of the media markets in the state including ones that covered the 7th district and candidates made visits in the state expecting it to once again be a tough battle for the state’s 17 electoral votes. This all changed in the first week of October when the McCain campaign announced it was pulling its resources from the state of Michigan to increase spending in other states deemed more competitive.

Tim Walberg was clear about his hopes for working with the McCain campaign. He told the *Ann Arbor News* in early September before McCain’s withdrawal: “We’ll help him and he’ll help us, there’s no doubt about it. . . .

I think his message will truly resonate with people who want to have reform in Washington. He's not afraid to take anyone on."⁴¹ According to the story, Walberg hoped he could take advantage of McCain's success in Michigan, and Washtenaw County specifically, during the 2000 presidential primary. Clearly, he was looking to pick up the votes of some moderate partisans and independents that he had struggled to connect with to that point.⁴² Mark Schauer attempted to capitalize on and take advantage of the excitement and enthusiasm associated with Barack Obama's candidacy. This was especially true among young voters as there are several colleges and universities in the district. Pollster Bernie Porn noted the potential impact:

There's a real intensity in terms of the intent to turn out voters, especially African-Americans and younger voters . . . and you can see that in the numbers of new registrants. They're voting for Obama. We can't assume they'll vote Democratic down the ticket but I would be surprised if they didn't.⁴³

The McCain campaign's decision to pull out of the state had a dramatic effect on the race in the 7th district. Now, instead of both candidates rallying support and trying to energize the base, only the Obama campaign was left in Michigan. This had a two-fold impact. First, the resources that could have helped Tim Walberg while John McCain battled to win statewide were gone. Second, and more importantly, any excitement and motivation that was present among Republicans in the state also was gone. As long-time Michigan political analyst Bill Ballenger noted: "Any time your standard bearer . . . throws up the white flag and says 'I quit,' and leaves the field of battle, it has to be a body blow to the whole party, on down to the candidates."⁴⁴

Interestingly, the Obama campaign, buoyed by their tremendous advantage in campaign resources, stayed active in Michigan. They stayed on the air and kept much of their staff in the state, thus keeping up the excitement in the Democratic base.⁴⁵ Schauer beat Walberg by less than 7,500 votes, or about 2 percent. He certainly benefited from the Obama campaign's continued presence in the district. Would the outcome of the race have been different had McCain stayed in Michigan? That is a more difficult question to answer. Obama's strength and appeal were difficult to combat, especially given Walberg's strong conservative record. Schauer may have won anyway since Walberg was in electoral trouble even without the presidential contest as a factor in the race. But when Schauer had the added advantage of the Obama campaign's resources and excitement Walberg's fate was likely sealed.

Conclusion

Tim Walberg was defeated on November 4, 2008 by a margin of 48.8 percent to 46.5 percent of the vote, marking the fourth time in four elections

that the citizens of the 7th congressional district had elected a new member of Congress. A number of factors contributed to Walberg's loss in 2008 that were tied to trends in the district and voters, national-level political factors, and factors related to the candidates and their campaigns. On a fundamental level, the 7th district was trending Democratic, especially in Eaton and Washtenaw counties with a migration of Democrats and Democratic-leaning individuals to those areas from the cities of Lansing and Ann Arbor. This gave the Democrats at least a shot at making the 7th, once a solid district for the GOP, a possible Democratic seat.

Of course, the larger economic and political trends in 2008 also hurt Walberg's re-election chances. President Bush had very low approval ratings by the time the 2008 election cycle began, due to looming economic difficulties and the war in Iraq continued to be unpopular with voters. Voters in the 7th district were worried about the economy as they kept seeing their jobs disappear, and many felt this was the result of both bad trade policies and general economic decline. In addition, Rep. Walberg was swimming against the tide that was moving nationally and had begun two years prior. Walberg beat an underfunded and inexperienced challenger two years before by less than 4 percentage points and with 49.9 percent, failed to get a majority of votes; he probably should have been prepared for a fight, or at least known that the Democrats would come after him with a strong challenge.

Mark Schauer certainly benefited from Democratic presidential candidate Barack Obama's strength nationally and statewide. Obama won by a large margin after John McCain decided to no longer contest the state after early October. Schauer benefited from increased turnout and enthusiasm in his base. He was able to take advantage of the popularity of the top of the ticket first hand when Obama visited Battle Creek as part of his campaign travels and Democratic candidate Schauer spoke at that same rally, which drew over 18,000 people. Schauer was the last person to speak before vice presidential candidate Joe Biden introduced Obama and presented the two with a box of Corn Flakes cereal made at the local Kellogg's factory complete with the pictures of the two on the front of the box. As Schauer advisor Ken Brock said about the event, "That's gold. . . . Did that persuade anyone to vote for him? Probably not. But does it build energy and enthusiasm for our team? Oh yeah."⁴⁶

Trends in the district and the national political environment set the stage for a Democratic pickup in the 7th district, but the factors that closed the door on Rep. Walberg's reelection were ultimately driven by the candidates and their campaigns. Despite the indications that the Republican "brand" was in decline, Rep. Walberg stayed true to his social and fiscal conservative principles. He supported federal tax cuts and argued that the troop surge in Iraq was effective. He supported a hybrid privatized version

of Social Security and opposed the \$700 billion financial institutions bailout. He did not always support President Bush on the floor of the House, but many times it was difficult to know that by his actions and rhetoric on the campaign trail. Walberg defended the president's policies and the Republican approach for most of the 2008 campaign. He did not try to put much distance between himself and the president—as many Republican candidates around the country tried to do in 2008, given the president's unpopularity. Rob South, a reporter covering the race for WKAR Radio in Lansing, found that Walberg's strategy regarding the problems of the economy and President Bush's approval ratings did play a role in this campaign:

It sure did put Walberg on the defensive, but he defended his president! Walberg was a stalwart George W. Bush supporter to the bitter end—except when Bush started to talk about bank bailouts and the bailouts for the Big 3 automakers. Walberg maintained his conservative, small government, “defend our flag,” composure throughout the campaign. While that message continued to play well in the conservative rural areas of the district, he lost favor as the Republicans imploded.⁴⁷

Even though Walberg was not the staunchest supporter of President Bush, he was seen as a very conservative member of Congress and candidate. This, in the end, is what failed him—he did not fit well with the district, especially as it continued to see shifts that made it more Democratic. In essence, Walberg was a candidate who was a terrific fit for the GOP primary electorate—his social conservative and anti-tax positions served him well—but a bad fit for a general election in a district that overall is more moderate. To his credit, Tim Walberg never tried to run from his core beliefs. He was very much a “what-you-see-is-what-you-get” candidate. Unfortunately for him, he could not attract enough votes from the middle of the political spectrum to secure a victory in the general election.

Stephen Medvic's (2001) theory of deliberate priming argues that when deciding what issues to focus on, candidates and their campaign teams look to those issues that, one, the public cares about, and two, on which they have a strategic advantage over their opponent. Walberg failed by focusing on issues that were not at the top of the public's mind, which, by an overwhelming majority, was the economy. He also failed to use the issue of terrorism to a great degree. Recall that this issue was the second most cited issue in the district, albeit with only 13 percent; but concerns over terrorism was a close second in Schauer's home county of Calhoun. Had Walberg used this more effectively, he may have been able to take some additional votes away from Schauer in his backyard, which is where Schauer effectively won the election. Schauer won by 7,500 votes; he carried Calhoun

County by 10,000. Had Walberg used the issues to his advantage more, he may have been able to pull the race out.

Moreover, while Walberg broke from the president to support proposals that were beneficial to the district, he did not have that much to brag about to his constituents in terms of district service, which can help incumbents at election time (Ferejohn 1974; Levitt and Snyder 1997). One of the local papers in the district noted this when making their endorsement before election day. The *Jackson Citizen Patriot* (the same Jackson, Michigan town where the Republican Party was born in 1845) said the following while endorsing Mark Schauer:

. . . this congressional district—and every district—deserves an advocate. It needs someone who can identify priorities and fight to see they are met. The Jackson area needs money to modernize I-94. Michigan's automakers (and, by extension, their local suppliers) need federal assistance. Economic development projects involving government contracts or regulations need attention from a local lawmaker. Walberg's record in this regard has been spotty. Schauer's has been exceptional.⁴⁸

Mark Schauer certainly had a lot to do with the victory. Just by getting into the race, he made the seat competitive. In Schauer, a popular state senator and Senate Minority Leader, the Democrats had a candidate that had name recognition and a much higher profile than his predecessor Sharon Renier. Mark Schauer was particularly strong in Calhoun County (his home county) and won Jackson County (a rarity for a Democrat). Schauer also did well in Lenawee County, trailing Walberg by only 900 votes out of 45,000 cast in one of the southern tier counties that had been solidly conservative and Republican in the past. Mark Schauer's own analysis of his victory touched on several factors:

It's very difficult to unseat an incumbent. But the 2006 election demonstrated that Tim Walberg was vulnerable and much too extreme for the district. We ultimately were able to draw contrasts and make the case that he was just out of step with the district. He had failed to represent the district in a way that would help people and businesses who were suffering in a tough economy. He had failed on the trade issue; he had marched in lockstep with the Club for Growth. . . . He didn't have any accomplishments to campaign on. . . . Plus, he was totally tone-deaf—he didn't listen to the district. . . . We were able to successfully make the case that Walberg should be fired.⁴⁹

Interestingly, in the several interviews we did for this article every person believed that the 7th congressional district would still likely be a safe district for a Republican had that Republican been Joe Schwarz. This is partly seen in the candidate the Democrats put forward in 2006—organic farmer Sharon Renier. Had Schwarz won the race in 2006 there was no

guarantee that Schauer would have even run. According to journalist Rob South, Schwarz “really fit [the district] and . . . a lot of people were comfortable with him.”⁵⁰ Speaking about fit with the district, not long after he lost the 2006 primary, Joe Schwarz predicted that his party would lose the seat. In recounting a lunch meeting he had with then Minority Whip Roy Blunt (R–Mo.), Schwarz says Blunt asked him what was going to happen in the 7th. Schwarz responded:

I said, “Here’s what’s going to happen. There’s a 50 percent chance Walberg will lose this year . . . and the only reason he’ll win is because his opponent is Sharon Renier.” And . . . he damn near did. . . . And I said, “the chance he will lose in 2008 is 100 percent. . . . I’ll beat him if I run as a Democrat and . . . Mark Schauer will beat him.”⁵¹

Now, the 7th congressional district is far from a safe Democratic seat. Recall, Mark Schauer, like Walberg two years before, also failed to get a majority of votes on Election Day. In 2010, this district may just as easily elect its fifth member of the House in as many election cycles.

NOTES

¹Ken Brock, telephone interview, March 12, 2009.

²Rep. Joe Schwarz, personal interview, March 10, 2009.

³Rep. Joe Schwarz, personal interview, March 10, 2009.

⁴Walberg served as pastor of Grace Fellowship Church in New Haven, Indiana, in the 1970s, and of United Gospel Church in Tipton, Michigan, from 1978 to 1982.

⁵Center for Responsive Politics, “Michigan: Congressional Races in 2006,” <http://www.opensecrets.org/races/election.php?state=MI&cycle=2006> [accessed March 25, 2009].

⁶Ken Brock, telephone interview, March 12, 2009.

⁷Rep. Mark Schauer, phone interview, March 26, 2009.

⁸Poll data were provided by Bernie Porn of EPIC-MRA.

⁹John Cavanaugh, quoted in Deb Price, “Walberg faces stiff reelection battle,” March 7, 2008, p. B5.

¹⁰Poll data were provided by Bernie Porn of EPIC-MRA.

¹¹Deb Price, “GOP lawmakers in tight races,” *Detroit News*, August 26, 2008, p. B1.

¹²Louis Aguilar, “Worst yet to come for Michigan economy,” June 13, 2007, <http://www.detnews.com/apps/pbcs.dll/article?aid=/20070613/biz/706130416/1001> [accessed March 19, 2009].

¹³Poll data were provided by Bernie Porn of EPIC-MRA.

¹⁴Bernie Porn, telephone interview, March 23, 2009.

¹⁵http://www.youtube.com/watch?v=kwS_fEitGUM.

¹⁶Bernie Porn, telephone interview, March 23, 2009.

¹⁷Ken Brock, telephone interview, March 12, 2009.

¹⁸Bernie Porn, telephone interview, March 23, 2009.

¹⁹Derek Wallbank, "Schauer to challenge Walberg," *Lansing State Journal*, August 6, 2008. www.lansingstatejournal.com/apps/pbcs.dll/article?AID=2008808060370 [accessed March 20, 2009].

²⁰David Frownfelder, "Walberg, Schauer spar on economy, Iraq," *Daily Telegram* (Adrian, MI), October 8, 2008. <http://www.lencconnect.com/archive/x282364794/Walberg-Schauer-spar-on-economy-Iraq> [accessed March 21, 2009].

²¹Ken Brock, telephone interview, March 12, 2009.

²²<http://www.youtube.com/watch?v=iL7wcUOLDV4>.

²³<http://www.youtube.com/watch?v=4iY9kpm0mYk>.

²⁴Ken Brock, telephone interview, March 12, 2009.

²⁵Center for Responsive Politics, "Races to Watch I: Challengers Outraising Incumbents," <http://www.opensecrets.org/news/2008/09/races-to-watch-i-challengers-o.html> [accessed March 22, 2009].

²⁶Quoted in Deb Price and Gordon Trowbridge, "Rep. Walberg trails in campaign funds," *Detroit News*, February 1, 2008, p. 5B.

²⁷Center for Responsive Politics, "Top Contributors." <http://www.opensecrets.org/races/contrib.php?cycle=2008&id=MI07> [accessed March 22, 2009]. CRP makes an important point about these figures: "The organizations themselves did not donate, rather the money came from the organization's PAC, its individual members or employees or owners, and those individuals' immediate families."

²⁸An important point here is that there are also some consulting fees contained in the dollars listed under paid media. Media consultants may be on retainer, but they also take a percentage of the media buy (the cost of getting the ad they make on the air) as a commission. This can be as high as 15 percent of the total media buy. However, this is not disclosed or separated out in filings with the FEC so it is impossible to know exactly how much went to the consultants who produced and bought time for TV ads.

²⁹The source of the data in this section is reports from the Federal Election Commission.

³⁰Ken Brock, phone interview, March 12, 2009.

³¹Center for Responsive Politics, "Independent Expenditures," <http://www.opensecrets.org/overview/indexp.php?Display=R&filter=A> [accessed May 7, 2009].

³²Reid Wilson, "Club returns to aid Walberg," *The Politico* <http://dyn.thepolitico.com/blogs/scorecard/index.cfm/category/Michigan> [accessed March 16, 2009].

³³Deb Price, "Two Mich. Dems outraise House incumbents," *Detroit News*, October 16, 2008, p. A5.

³⁴http://www.youtube.com/watch?v=-9xr_OLpijg.

³⁵<http://www.youtube.com/watch?v=zE7XU309DNk>.

³⁶Deb Price, "Two Mich. Dems outraise House incumbents," *Detroit News*, October 16, 2008, p. A5.

³⁷Ken Brock, telephone interview, March 12, 2009.

³⁸Ken Brock, telephone interview, March 12, 2009.

³⁹Michigan Campaign Finance Network, "Campaign Finance 2008: A first look back," <http://www.mcffn.org/press.php?prID=76> [accessed March 16, 2009].

⁴⁰Ken Brock, telephone interview, March 12, 2009.

⁴¹Art Aisner, "GOP lawmakers look for bounce." *Ann Arbor News*, September 07, 2008 <http://www.mlive.com/news/annarbornews/index.ssf?/base/news-29/1220769619230941.xml&coll=2> [accessed March 24, 2009].

⁴²Art Aisner, "GOP lawmakers look for bounce." *Ann Arbor News*, September 07, 2008 <http://www.mlive.com/news/annarbornews/index.ssf?/base/news-29/1220769619230941.xml&coll=2> [accessed March 24, 2009].

⁴³Bernie Porn, telephone interview, March 23, 2009.

⁴⁴Alexa Stanard, "Two Michigan Republican congressional candidates struggling in wake of McCain departure," *Michigan Messenger*, October 22, 2008 <http://michigan-messenger.com/6754/two-michigan-republican-congressional-candidates-struggling-in-wake-of-mccain-departure> [accessed March 24, 2009].

⁴⁵Ken Brock, telephone interview, March 12, 2009.

⁴⁶Ken Brock, telephone interview, March 12, 2009.

⁴⁷Rob South, telephone interview, March 12, 2009.

⁴⁸*Jackson Citizen Patriot*, "Schauer the better choice for Congress," November 2, 2008, http://www.mlive.com/opinion/jackson/index.ssf/2008/11/schauer_the_better_choice_for.html [accessed May 6, 2009].

⁴⁹Rep. Mark Schauer, telephone interview, March 26, 2009.

⁵⁰Rep. Rob South, telephone interview, March 12, 2009.

⁵¹Rep. Joe Schwarz, personal interview, March 10, 2009.

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