

# Gone, but not forgotten? The German federal election 2021 and the effect of an incumbent who did not run

Holger Reinermann\*, Fabio Best, Sascha Huber, Robert Welz

JGU Mainz, Germany

## ARTICLE INFO

### Keywords:

Incumbency advantage  
Candidate-centered voting  
Political judgment  
Dynamic political evaluations  
Personalization of politics  
Political leaders  
Political candidates  
German Federal Election 2021

## ABSTRACT

The German federal election 2021 was remarkable partly because the incumbent chancellor Angela Merkel, albeit still popular, was not running for re-election and did not figure prominently in the campaign. Drawing on the literatures on incumbency advantage, cost of ruling, and candidate-centered voting, we analyze whether an outgoing incumbent might still have an effect on voters' attitudes and behavior. We distinguish two phenomena: First, we expect the effects of outgoing incumbents on electoral behavior to *wash off* during campaigns, as voters get more informed and adjust to new candidates. Second, if the incumbent's successor as front-runner of their party manages to link themselves to their predecessor, the incumbent's reputation might *rub off* on the new candidate, possibly indirectly enhancing electoral fortunes of the party. We examine the dynamics of these phenomena using data from the panel and RCS components of the *German Longitudinal Election Study* and a large-scale survey experiment.

## 1. Introduction

Vote choice is not a static decision made at an isolated point in time. Extensive strands of literature deal with how perceptions about either the past or the future (or both) impact voting behavior. One of the recurring findings is that incumbents enjoy an advantage over candidates and parties that were in opposition prior to the election. However, this effect varies considerably depending on the political context (e.g. [Ansolabehere et al., 2000](#)). While there is extensive literature on incumbency effects ([Gelman and King, 1990](#); [Gschwend and Zittel, 2015](#)), the particular case of executive incumbents in parliamentary systems who are not running again is not yet understood very well. From a rather naïve understanding, the incumbent should not affect voting decisions at all in this situation — after all, they are not up for election anymore. However, voters who make up their minds about politics at a given point in time might still be influenced by their attitudes towards and perceptions of the outgoing incumbent. If political judgments are not made in isolation for each new election but are informed by earlier judgments, it is very plausible that incumbents who are not running anymore do still have an influence on election outcomes.

Against this background, we study the direct and indirect effects of an incumbent who does not run again on voters' attitudes towards

candidates and voting behavior. While incumbency and candidate effects have been studied in the political science literature in great depth, research on the effects of outgoing incumbents is relatively scarce and not exhaustively theorized. Building on advances by [Hainmueller and Kern \(2008\)](#) and [Elis et al. \(2010\)](#), we distinguish between the outgoing incumbent's effect on voters' assessments of the succeeding candidate on the one hand and vote choices on the other hand. We employ social judgment theory ([Bless and Schwarz, 1998](#); [Wänke et al., 2001](#)) to develop two expectations guiding our analysis: First, we expect the effects of outgoing incumbents on electoral behavior to decrease throughout campaigns, as voters adjust to the new context and fresh candidates, a process we label *washing off*. Second, if the incumbent's successor as front-runner of their party achieves to link themselves to the predecessor, the incumbent's reputation might *rub off* on the new candidate, possibly indirectly affecting electoral fortunes.

The German federal election in 2021 is a particularly suitable case to study these two effects of outgoing incumbents in parliamentary systems. For Germany, this was a rather remarkable situation, because it was the first time since the foundation of the Federal Republic in 1949 that the incumbent chancellor was not running again. While formally not the head of state, the chancellor arguably is the most prominent executive figure in the German government. Angela Merkel was very popular at the end of her 16 years as chancellor and her early

\* Corresponding author.

E-mail addresses: [reinermann@politik.uni-mainz.de](mailto:reinermann@politik.uni-mainz.de) (H. Reinermann), [best@politik.uni-mainz.de](mailto:best@politik.uni-mainz.de) (F. Best), [huber@politik.uni-mainz.de](mailto:huber@politik.uni-mainz.de) (S. Huber), [welz@politik.uni-mainz.de](mailto:welz@politik.uni-mainz.de) (R. Welz).

<https://doi.org/10.1016/j.electstud.2023.102698>

Received 11 November 2022; Received in revised form 18 September 2023; Accepted 29 September 2023

Available online 18 October 2023

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decision not to run again in the election was widely seen as ‘the end of an era’; discussions of her ‘legacy’ were ubiquitous (e.g. *Sueddeutsche Zeitung*, 2021) after she had already relinquished party leadership in 2018. At the same time, she did not figure prominently in the actual campaign. For instance, she made very few appearances at the side of Armin Laschet, the new candidate of the CDU/CSU, a circumstance that was widely discussed (*Merkur.de*, 2021). In the end, the CDU/CSU incurred a historically bad result, ending its 16 years in government. This was to a large extent attributed to Laschet lacking the popularity of his predecessor, with some commentators also speculating that Merkel could have changed her party’s fortunes if she had played a more active role in the campaign. As we discuss in the conclusion, while the effects we detect here would not have induced seismic changes in the election result, they make this conjecture plausible — also because the eventual election result favored the SPD by a thin margin.

Our analysis of how much Merkel still shaped the perceptions and evaluations of voters in the 2021 German federal election rests on both observational and experimental data: On the one hand, we rely on waves 1–19 of the German Longitudinal Election Study (GLES) panel (GLES, 2021, 2022a,b,c,d), with some additional insights from the last three rolling cross sections (RCS) run by GLES (2019, 2022f,e). On the other hand, we use a large-scale survey experiment that we conducted in July 2021 and in which we compare subjects with and without a prime about Angela Merkel’s departure. This experimental design allows us to examine a potential causal effect of the saliency of Angela Merkel as an incumbent on voters’ attitudes towards Laschet.

We believe that this article makes a valuable contribution to the study of electoral behavior as we examine a phenomenon that is not yet well understood. We shed light on whether and how voters are influenced by politicians who are not running anymore, a situation that turns up frequently but is rarely addressed in detail in the respective literature. Drawing on social judgment theory, our study extends the rich literature on incumbency effects and highlights the importance of a dynamic perspective on voting behavior.

## 2. Candidate and incumbency effects without personal continuity

Several strands of literature examine how either candidates or parties are affected electorally if they already hold a prominent office. However, none of them fully applies to the case of incumbent politicians who do not run for office again, since in their respective original formulations, they require continuity of the entity at stake, e.g. because they argue that incumbent candidates possess specific personal characteristics that give them personally an advantage or because they personally are evaluated differently because they are already in office.

In the case of incumbent politicians who do not run for election anymore, this continuity is broken: since the person who holds office is not on the ballot, there is no incumbent in a traditional sense. Still, vote choices might be affected by those politicians as there are indirect continuities, for instance because one of the new candidates belongs to the same party as the outgoing officeholder. In most situations, it seems inconceivable that voters’ decision calculus is ‘reset’ completely at a given election.

Before turning to the special case of incumbents not running anymore, a look at the traditional incumbency literature is useful. There is plenty of empirical support that being in office helps individual candidates in future elections (see e.g. Gelman and King, 1990; Cox and Katz, 1996). The origins of such incumbency advantages are manifold. Besides effects of mere candidate quality of the incumbent (Zaller, 1998; Fowler, 2016) and, consequentially, the deterrent of potential challengers (Ashworth and Bueno de Mesquita, 2008), previous research points to substantive advantages in media coverage (Green-Pedersen et al., 2017; Prior, 2006) on which incumbents can build their prominence (Druckman et al., 2020) which eventually will favor them over their challengers at the ballot box (Ansolabehere et al.,

2000). In addition to candidate-specific and system-level factors, voters’ traits might play an important part as well. As Eckles et al. (2014) argue, familiarity with the incumbents, their positions, and their style of politics prompts risk-averse voters to prefer officeholders over their challengers. While the traditional incumbency literature mainly focuses on highly personalized elections such as presidential elections or district voting under majority rule, there is now also some evidence for less personalized PR systems with (closed) party lists (see Jankowski and Müller, 2021 for a recent review).

At the same time, studies that focus on incumbent parties rather than on incumbent candidates interestingly find opposite effects. According to these studies, incumbency is not necessarily an ‘asset’ but rather a ‘liability’ (Rose and Mackie, 1983). Empirically, there is a well-documented pattern that governing parties systematically lose votes (see e.g., Paldam, 1986; Powell and Whitten, 1993), and some attempts have been made to theorize these ‘costs of ruling’. Two approaches are mainly used to study these costs in multiparty systems (see e.g., Hjermitsev, 2020; Allers et al., 2022): The grievance asymmetry theory, on the one hand, builds on the notion that risk-averse voters weigh failures more heavily than achievements in their assessments of incumbents (Kahneman and Tversky, 1979), which on average leads to vote loss for governmental parties (see e.g., Nannestad and Paldam, 2002). The coalition of minorities theory, on the other hand, states that parties tend to systematically overpromise to voters (Downs, 1957), but once in office are unable to fulfill all their pledges and are punished at the ballot box (Klüver and Spoon, 2020). Ultimately, both theories build on voters’ responsibility attribution. While research on the costs of governing mostly focuses on the role and characteristics of parties (Van Spanje, 2011; Hjermitsev, 2020; Klüver and Spoon, 2020; Allers et al., 2022), agenda power is crucial for the attribution of responsibility (Duch and Falcó-Gimeno, 2022) which, in the case of Germany, is closely linked to the chancellor (Berz, 2020).

The incumbency literature and the cost of ruling literature thus come to very different conclusions by either focusing on candidates or parties. For vote choices that are about candidates – like presidential elections or district candidates in majority rule elections – the incumbency advantage might be the dominant factor. For vote choices that put parties at the center – like (closed) list elections in parliamentary systems – the cost of ruling arguments might be more important. Probably though, both factors do play a role at the same time. For parliamentary systems, it has been extensively shown that voters focus not only on parties but also use evaluations of party leaders for their vote choices and that both factors interact with each other (e.g. Quinlan and McAllister, 2022; Costa Lobo and Curtice, 2015; Huber, 2015). For Germany, the effect of chancellor candidates has been found to vary to a considerable degree between elections depending on the electoral context and the popularity of party leaders (Klingemann and Taylor, 1977; Kaase, 1994; Wagner and Wessels, 2011; Ohr et al., 2013; Gschwend and Zittel, 2015). Some prominent factors that have been identified for candidate-centered voting are perceived experience, political competence, and favorable personality traits (Norpoth, 1977).

Even if it is well established that evaluations of incumbents and party leaders will influence vote choices, it is far from obvious how an outgoing incumbent might alter candidate-centered voting. Fowler and Hall (2014) make a persuasive argument on personal and partisan incumbency advantages: they argue that voters do not only favor the incumbents themselves but “attribute the actions of representatives to their parties or that retiring representatives systematically help new candidates from their party” (p. 502). However, the authors themselves do not find such partisan incumbency effects investigating US state elections, and evidence from other studies at different levels is mixed (see Salas, 2016). Elis et al. (2010), on the other hand, find a considerable effect of an outgoing incumbent. One reason for this inconclusive evidence might be case selection. Both studies use the US case, which as a highly personalized system might have a more ambiguous incumbent-party nexus. In systems in which parties are more coherent political

objects and structure the political competition more strongly, outgoing incumbents will much more reliably be associated with their party. We therefore think that the proposed partisan incumbency effect is particularly plausible in less personalized parliamentary systems like Germany and at the level of chancellors or prime ministers. When the personal component of incumbency does not apply due to an outgoing incumbent, there is still the office-holding party and a succeeding party leader in pursuit of continuity. In that situation, a possible option for citizens satisfied with the outgoing incumbent seems to be a vote for the incumbent's party.

### 2.1. Categorization of outgoing incumbents

According to research in social psychology, individuals need to construct both a mental representation of a stimulus that they want to evaluate and a particular standard of comparison, either of which is highly dependent on what information is cognitively accessible to them at the moment (e.g. Schwarz and Bless, 1992). How this process plays out hinges to a large degree on categorization: that is, whether either the stimulus and the information elements that constitute the standard are individual tokens (exemplars) or a general type (categories), and to what degree category memberships are cognitively available to the respondents. Depending on the specific configuration, assimilation or contrast effects can be observed, i.e. context information either has a positive effect on the evaluation or a negative one. Studies on evaluating politicians found, for instance, that the relationship between evaluations of an individual politician (exemplar) and the evaluation of their party (category) depends on how salient party membership is Bless and Schwarz (1998). This echoes our reasoning with respect to institutional differences between countries from above: in systems with a strong focus on parties, like the parliamentary, PR-based system in Germany, party membership of outgoing incumbents will be much more salient than in systems that have a stronger emphasis on candidates. That is, outgoing chancellors might be rather categorized as exemplars of their party and hence still influence party evaluations.

However, the influence extends beyond the party itself, as other politicians can also be impacted by the assessment of a fellow party member. Assimilation effects can arise from the shared party label between a successor and predecessor. Wänke et al. (2001) find that assimilation effects between two politicians are more likely the more salient a common category is, although party membership is not the only category on which voters can rely. Other categories like being members of the same coalition government may also influence voter perceptions. Depending on which category is more salient, different assimilation effects should occur. But again, in the German case of a very much party-centered system, we expect the party category to be most salient for voters.

Whether or not voters use such a categorization also depends on how much they are influenced by retrospective considerations. In past research, retrospective and prospective voting have often been cast against each other as mutually exclusive models (e.g. Lanoue, 1994; Norpoth, 1996). If that was accurate, expectations for the scenario we study would be very clear: purely prospective voters should pay no heed to politicians who can or will not take office anymore. On the other end, voters who mainly decide retrospectively will not care much about newly running candidates. These two extreme scenarios both seem implausible: prospective as well as retrospective evaluations are likely to play a role in voters' judgments, albeit to different degrees depending on the political context (Elis et al., 2010; Singer and Carlin, 2013). Based on these considerations, we expect voters to be still influenced by an outgoing incumbent and propose two different observable patterns, we will discuss in greater detail below.

### 2.2. Washing off: Diminishing influences of outgoing incumbents on vote choice

As we discussed above, social judgment research points out that evaluations of an individual exemplar (e.g., a candidate) are likely to have a positive influence on evaluations of the category it belongs to (e.g., a party) if the category membership figures prominently in the evaluative situation. Whether that is the case may depend on a broad set of variables. De Ferrari (2015), for example, points out that parties have some leeway in whether they capitalize on the achievements of 'their' president or present their candidate as a 'fresh start', and correspondingly finds different effects of the economy on vote intentions depending on whether parties claim to continue the work of an outgoing president.

Generally, party affiliations of candidates are, however, a very salient category in modern democracies, whether parties stress the connection or not. Political judgments about political objects often depend on party cues. At the same time, party evaluations are shaped by candidate evaluations (e.g., Lenz, 2013). For many voters, there is a strong link between candidates and their parties. Therefore, we expect parties are also likely to benefit (or suffer) from the good (or bad) reputation of outgoing prominent incumbents. This effect should be strongest when voters do not yet have much information about a new candidate and are still relying on evaluations of the outgoing incumbent. As they learn more about new candidates in an unfolding election campaign, this initial effect of the incumbent should diminish.

Elis et al.'s (2010) study on the US presidential election of 2008 is one case in point. That election took place in a very similar configuration as the one we are studying here insofar as George W. Bush was not able to run as a candidate anymore, and the Republican party fielded fresh candidates. Bush, still being associated with his party, had a positive impact on respondents' intention to vote Republican. However, this effect somewhat diminished over the course of the campaign, suggesting a mix of both prospective and retrospective reasoning in voters' decision-making: voters access more information about the new candidate as the election draws closer which then features more prominent in their electoral decision-making. As voters learn more about the election at hand the longer an election campaign lasts, the effect of an outgoing incumbent decreases over time, a process we label as *washing off* of the incumbent's effect.

While the institutional characteristics of Elis et al.'s case are quite different from ours, we believe that this effect works very similar in parliamentary systems like Germany. Political parties, while an equally salient label for political actors, tend to be more coherent in parliamentary systems with closed list voting, such as Germany, than in presidential systems with majority voting. Candidates for chancellor are chosen by their parties and even though voters cannot vote directly for those candidates on the national level, there is a strong link between candidates and parties. These characteristics also reduce the potential for dissociation between party and incumbent, as noted by De Ferrari (2015). Thus, we believe that our case selection makes it rather likely that we observe strong initial effects of the outgoing incumbent that will eventually *wash off* during the election campaign.

### 2.3. Rubbing off: Candidates benefiting from outgoing incumbents

When voters evaluate a new candidate and not the party, this may depend again on the standard of comparison they use. While both party and candidate may face restrictions on the degree to which they can 'disown' or 'claim' an incumbent, these restrictions arguably are different. For instance, before a candidate is chosen, different contenders have to position themselves vis-à-vis the incumbent (see for the German case below), a configuration which is likely to be picked up on by the media and the general public. If candidates manage to present themselves as the 'true heir' to an incumbent and emphasize their belonging to the same party or even the same political camp of the party, voters

will be more likely to perceive them to belong to the same category. It is then very plausible that “a popular incumbent’s reputation rubs off on the next candidate her party puts forward after she decides to retire (especially if she explicitly endorses the candidate)” (Hainmueller and Kern, 2008, 217). Again, we think this mechanism to work not only in presidential elections but also in parliamentary elections with an outgoing prime minister or chancellor. Analogous to what we argued above, parties should serve as a very salient mutual category of the incumbent and the new candidate, creating an assimilation effect. To contrast this transmission of popularity from the *washing off* effect discussed above, we call this the *rubbing off* effect.

Depending on the success of a candidate to link themselves to a popular incumbent, the *rubbing off* effect on their own popularity will be more or less pronounced. While we generally expect a direct effect of the incumbent on party choices, which should get smaller and smaller over the campaign and hence *wash off* a bit over a campaign, the indirect effect of the popularity of an incumbent *rubbing off* on their successor as party leader will be more contingent on the specifics of the campaign. Thus, it is conceivable that a popular incumbent might still be beneficial to their party and to their successor even if voters realize that they are not running anymore. This would also be consistent, for instance, with the risk aversion argument made in the incumbency literature mentioned above.

### 3. Context of the German federal election of 2021

We examine the theoretical arguments made above using the federal election of 2021 in Germany. Apart from its historical significance, this election is very well suited for our purposes as it allows us to transcend the realm of presidential systems, on which research on incumbency effects is typically focused, and also provides us with a particular boundary condition. Although empirical cases are usually not completely unambiguous, the situation in the 2021 elections gives us reasonably clear empirical expectations, but still provides a relatively ‘hard’ test for our theoretical expectation: on the one hand, social judgment theory implies assimilation effects of Merkel both on her party and Laschet, since categorization is relatively clear. What is more, because of Merkel’s popularity (see below) concerning the electoral fortunes of the CDU/CSU, we can plausibly assume that if Merkel had any effect on them, she would have enhanced them.<sup>1</sup> On the other hand, Merkel’s early announcement that she would not run anymore makes it somewhat likely that Merkel’s effect both on her party and Laschet would have completely dissipated by the beginning of the election campaign.

Having been chancellor of Germany for 16 years, Angela Merkel was still remarkably popular in 2021. This probably was in no small part due to her skill in keeping potentially controversial topics off the agenda, presenting her party as united and herself as a pragmatic middle-of-the-road leader that during her long tenure had been able to steer Germany through a number of challenging times such as the Euro crisis, the height of the refugee movements in 2015 and the Covid-19 pandemic (see, i.a., Faas and Klingelhofer, 2019, 2022). After being successful in four federal elections since 2005 and having had a great impact on the electoral fortunes of the CDU/CSU in all those elections (Schoen, 2011; Schoen and Greszki, 2014; Hansen and Olsen, 2020), in 2018 she decided not to run again, which is a very unusual choice in German politics.

Armin Laschet became Merkel’s successor as party leader and as front-runner in the 2021 election. He was widely described as being ‘her’ candidate, particularly in comparison to his CDU rival Friedrich

Merz, who had fallen out with Merkel early on in his career. But even after Laschet became party leader of the CDU, his path to the candidacy was contested: since the beginning of the federal republic, the CDU is in a political alliance with the CSU, which competes solely in Bavaria, while the CDU competes in the rest of the country. Both parties then campaign with a joint candidate for the chancellorship. Because of that, CSU leader Markus Söder also had a plausible claim to the CDU/CSU candidacy, which led to speculations whether he would have better prospects as front-runner of the two parties. Eventually, Laschet was able to assert himself, but the dispute itself as well as endorsements by CDU politicians for Söder gave the impression of discord within the party and harmed Laschet’s image. Furthermore, Merkel was largely mute about the 2021 election, only doing a few campaign events in favor of Laschet. Many observers were puzzled about her apparently lackluster support for her party and Laschet in the 2021 election (Jesse, 2021; Faas and Klingelhofer, 2022). A priori, it is therefore not clear, how much of a *rubbing off* effect of her popularity on Armin Laschet materialized.

On the one hand, Laschet was always considered to be close to Merkel and perceived to be her ally in some intra-party struggles. Moreover, he had a similar style of politics, refraining from being too confrontational. Most importantly, Merkel did voice her support for his candidacy. On the other hand, Merkel was not very present in the campaign: being the chancellor of a grand coalition of CDU/CSU and SPD, she had a very long working relationship with vice-chancellor Olaf Scholz, who was now the chancellor candidate for the SPD and therefore the main rival for Laschet. Scholz tried to stress the prospect of continuity in government with him in charge and get some *rubbing off* from Merkel’s popularity as well by emphasizing him being part of the same cabinet (Schmitt-Beck, 2021). Given this partly rather unfavorable context, it is not straightforward to assume that the affiliation of Merkel and Laschet to the same category was clear-cut since much noise around the succession as chairperson of the CDU and chancellor candidate of the CDU/CSU arose during the campaign. Therefore, we expect only a moderate *rubbing off* effect of Merkel’s popularity on Armin Laschet.

Nevertheless, Angela Merkel’s popularity at the end of her tenure could still have had a direct effect on vote intentions for the CDU/CSU in the 2021 election, without necessarily helping Armin Laschet to become more popular himself. After all, in the parliamentary system of Germany, voters cast their vote for parties instead of candidates. Given the salience of Merkel’s long leadership of the CDU/CSU, retrospective voters could still use their evaluation of Merkel as a simple cue for their party choice, even if she was not running anymore, leading to considerable assimilation effects. According to this view, Merkel’s popularity should still have helped the CDU/CSU in this election. We expect this effect to be more pronounced when voters have not yet learned much about the candidates for chancellor in this election. As outlined above, Merkel was not very present during the campaign and as election day came closer the three candidates for chancellor – Armin Laschet (CDU/CSU), Olaf Scholz (SPD), and Annalena Baerbock (Greens) – stood more and more in the spotlight. For instance, the various TV debates between these three got very high audience ratings (Statista, 2022). By the end of the campaign, we expect voters to rely less on their evaluation of Merkel in making their vote choices and more on their evaluations of the actual candidates. Put short, we expect a strong *washing off*-effect during the campaign with only a small direct effect of Merkel remaining at the end.

### 4. Data

As observational data, we mainly rely on the German Longitudinal Election Study (GLES) panel, waves 1–19 (GLES, 2021, 2022a,b,c,d) in order to evaluate the effects discussed above. For additional long-term insights, we use the GLES Rolling Cross-Sections of 2013, 2017

<sup>1</sup> Note that assimilation always implies a positive sign for the effect of the standard of comparison on the stimulus to be evaluated, regardless of its valence. If Merkel would have been very unpopular, her effect would have been expected to hurt her party.

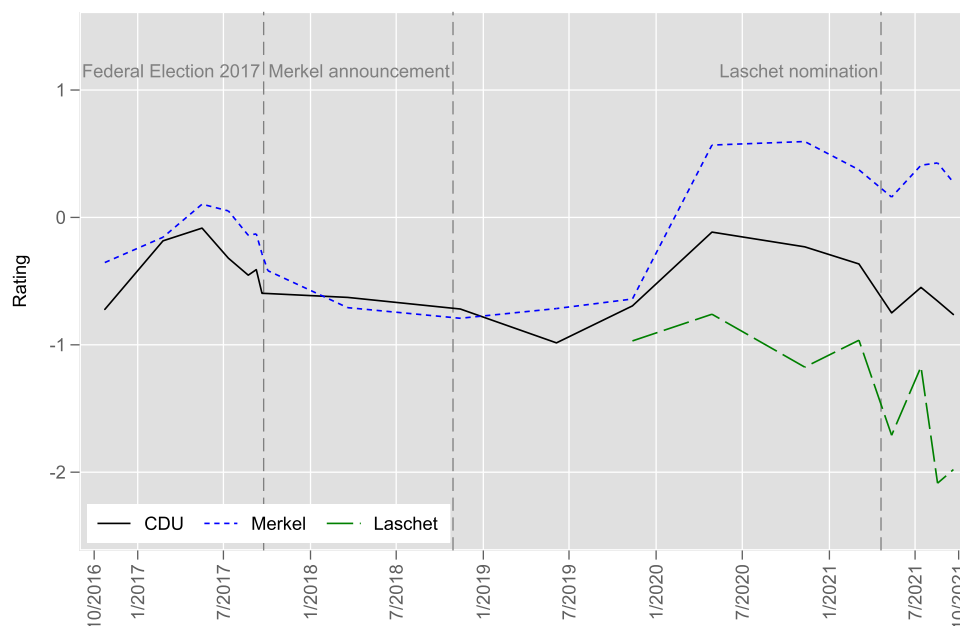


Fig. 1. Ratings of Angela Merkel, Armin Laschet, and the CDU, across GLES panel waves.

and 2021 (GLES, 2019, 2022f,e). Table A1 in the appendix contains the respective field times of all GLES surveys we use.

Containing information that has been collected in 19 interview waves from 2016 onwards, the GLES panel is perfectly suited both to investigate the long-term trajectories of Angela Merkel's effect on the electoral prospects of the CDU/CSU as well as to compare the effect of Merkel's popularity on vote intentions in the 2021 federal election with the 2017 federal election. In this comparison, the 2017 results can be considered a "baseline"-model against which the *washing off* of her effect can be gauged. The panel further allows us to investigate the *rubbing off* effect of Merkel's popularity on her possible successor Armin Laschet in the election campaign 2021. To ensure comparability between waves, we have limited our analysis to those 720 respondents who have participated in all 19 waves and exhibit only non-missing values on all independent and dependent variables.<sup>2</sup> While this inevitably biases our estimates, our robustness checks (see below and section 3 of the appendix) suggest that this bias is not so large as to fundamentally alter our substantive findings, which is why we judge comparability as the more important goal. Tables A2 and A3 in the appendix provide an overview of the variables used in our analyses.

Apart from these observational data we use experimental data from a survey experiment which we fielded from July 12 to 31 2021 at a very early stage of the campaign before the incisive changes in the run-up to the elections. To illustrate the relatively early stage of the campaign: during field time, polls placed CDU/CSU well above both the second-placed Greens and the Social Democrats. Throughout the campaign, the Christian Democrats forfeited popularity and eventually came in second behind the SPD. This development has been quite often ascribed to a downward spiral of bad campaigning by Laschet. However, it is conceivable that during our survey in July, citizens' perceptions were mostly unaffected by campaign dynamics and their judgments of the chancellor candidates were not yet concluded. This setting enables us to test a potential *rubbing off* effect of Merkel, independent of potential confounding influences.

The experiment complements our observational analyses insofar as it strengthens our claim that Angela Merkel causally affected the evaluation of Armin Laschet. While correlations of Merkel's and Laschet's

evaluations are suggestive, they could still come about through third variables or a causal effect in the reverse direction. In fact, we deem mutual causality a plausible scenario (also see Section 5.3). However, to ascertain the effect we are interested in here, we specifically scrutinize the causal effect of Merkel on Laschet and not vice versa. This also helps us examining the mechanism we put forth above: a necessary condition for the evaluation of an outgoing incumbent to alter citizens' assessment of running candidates would be that citizens take the incumbent into account when contemplating potential successors. In a natural campaign context, whether citizens have the incumbent in mind or not is hard to observe, let alone to examine causally. To approximate the relevant counterfactual, we tried to stimulate the consideration of Merkel in our experiment.

Participants were recruited via Facebook ads using demographic targeting on age and gender (Neundorf and Öztürk, 2021) and were randomly assigned to either a control ( $N = 1086$ ) or treatment group ( $N = 1103$ ). Respondents in both groups were asked to rate the three leading candidates for chancellorship on an eleven-point scale from  $-5$  to  $+5$ . For the treatment group, the question was introduced with a short sentence about Angela Merkel: "The upcoming federal election will be the first in 16 years in which Chancellor Angela Merkel will not be running". This sentence was omitted in the item for the control group. One should keep in mind that in this experimental setting, we were not able to actively prevent participants in the control group to consider Merkel when making up their minds about the candidates, but just did not mention her. However, we primed considerations about her in the treatment group. Consequently, differences between the two groups do not depict the whole effect Merkel could have had on candidate ratings but display more of a conservative tendency.

## 5. Analysis

First, descriptive impressions from our observational data show that one condition for a favorable influence of Merkel on the CDU/CSU, i.e. a relatively high popularity of Merkel, was certainly met. Fig. 1 shows the average ratings of Merkel, Laschet, and the CDU, across panel waves. Before the 2017 federal election, the incumbent Angela Merkel was evaluated slightly better than her party, possibly aiding the CDU/CSU in winning the election. After a period in which this gap disappeared, she started to be seen more positively than her party again after her announcement to not run for reelection in late 2018. The

<sup>2</sup> Observation numbers still fluctuate slightly due to collinearity issues (see table A4 in the appendix).

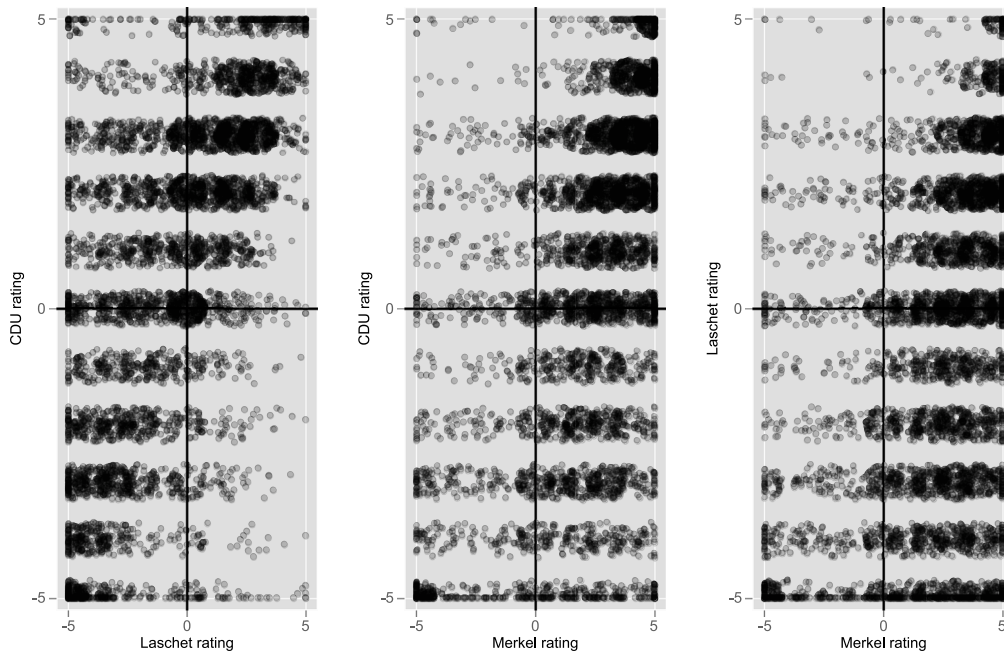


Fig. 2. Ratings for the CDU, contingent on Merkel (left) and Laschet rating (middle), and Armin Laschet's rating, contingent on Merkel rating (right), GLES RCS 2021.

biggest gap between her and her party, however, emerged during the pandemic: From 2020 onwards, she has constantly been seen positively while her party and especially Armin Laschet prime minister of North Rhine-Westphalia at that time had a net negative rating. Interestingly, his ratings even dropped after he was nominated as the joint chancellor candidate of CDU and CSU, which might be a result of the struggles between him and Söder. After this dip, it seemed as if momentum was beginning to build with rising ratings but as soon as August his favorability dropped again, presumably because of unfavorable public appearances, e.g. a picture of Laschet laughing during a condolence speech of president Steinmeier in the Ahr valley after a flood disaster in the region was a prominent subject in the media.

The branching out of the lines in Fig. 1 is echoed remarkably in Fig. 2, prepared with data from the RCS 2021. As the left and middle panel show, while both Merkel's and Laschet's ratings correlate positively with that for the CDU, Merkel was a boon for her party, whereas Laschet was more of a liability: even among respondents who evaluate the CDU negatively, Merkel is predominantly well-liked. For Laschet, the picture is reversed: Even those who give the CDU high ratings are mostly skeptical of him. On this basis (and in comparison to Armin Laschet), it appears that Merkel's high popularity, if an assimilation effect did materialize, may have helped the CDU/CSU in the 2021 election. As regards our central effects, the middle and right panels show the expected positive correlations between the evaluation of Merkel and that of the CDU (middle) and Laschet (right).

5.1. Washing off: Changes in Merkel's and Laschet's effects on CDU/CSU vote intention over time

Turning to the test of our first theoretical expectation - a washing off effect of the outgoing incumbent, Fig. 3 displays the influence of Angela Merkel and Armin Laschet on vote intentions for the CDU/CSU in the GLES panel (the underlying regression models are shown in tables A4–A6 in the appendix). It plots the average marginal effects of their respective evaluations in each wave, derived from logistic regressions with CDU/CSU vote intention as the dependent variable. Our models control for the standard sociodemographic variables age, gender, and education and whether respondents stated having a party identification (PID) with one of the six Bundestag parties in the first panel wave (this set of controls is used in all multivariate models to

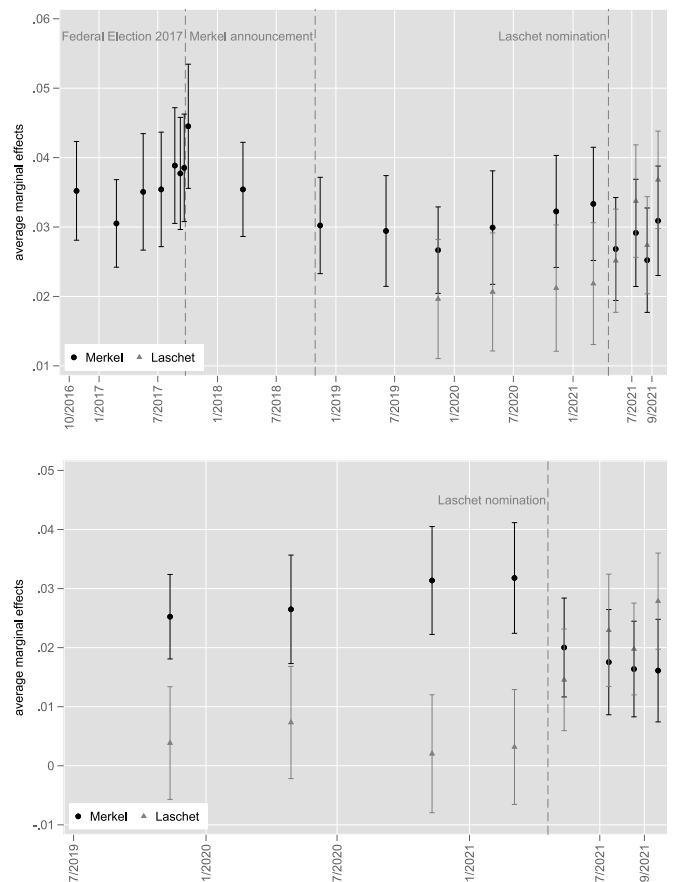


Fig. 3. Effect of Merkel (black) and Laschet (gray) ratings on CDU/CSU vote across GLES panel waves. Top: individual models for Merkel and Laschet, bottom: joint models.

increase comparability of the results). Since Laschet's evaluations are not available in all waves, we compute one set of regressions in which we only include the evaluation of either Merkel or Laschet (top panel) and one in which we include both evaluations (bottom panel).

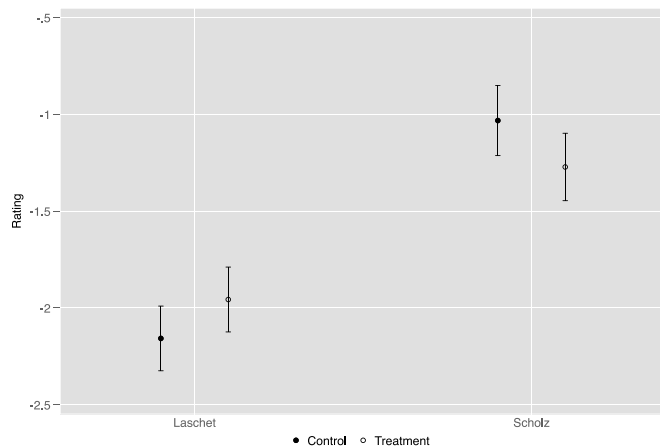


Fig. 4. Mean ratings of Laschet and Scholz in the control and treatment group, survey experiment.

Our findings indicate that Merkel had a positive impact on the prospects of the CDU/CSU throughout the covered timespan. However, her influence on vote intentions for the CDU/CSU is not static across panel waves. Specifically, there is a marked drop in conjunction with her renouncement of the candidacy for the federal election of 2021 in October 2018 (indicated by the second of the three vertical dashed lines in the plot). Notwithstanding the effect increasing again during the onset of the Covid19 pandemic, all in all, it decreases from the time of the federal election of 2017 to 2021 but is still far from absent. Voters did not completely disregard Merkel as the outgoing incumbent in the end even as her influence declined during the campaign and thus showed some signs of *washing off*. At the same time, Armin Laschet's influence on vote choices only starts to rise from insignificance after being nominated as the official CDU/CSU candidate in April 2021. The last wave of the GLES panel just before the election (fielded in September 2021) indicates that both politicians had a positive and roughly equivalent effect on vote intentions for the CDU/CSU. Even though Merkel's effect on vote choices *washes off* to an extent, it is remarkable how she still played a part for intended vote choices in the 2021 election.

### 5.2. Rubbing off: The effect of Merkel on Laschet's favorability

We start our analysis of the *rubbing off* effect with results from our survey experiment, carried out in July 2021. Comparing Armin Laschet and Olaf Scholz, Fig. 4 displays the mean ratings of the two candidates for the two experimental groups. Starting with the former, it is remarkable that Laschet is rated higher in the treatment group in which chancellor Merkel was mentioned in the question text, compared to the control group in which she was not mentioned. Using a one-tailed *t*-test, this difference reaches statistical significance ( $p < 0.05$ ). This finding is in line with the expectation that Merkel's incumbency status and potential related advantages would *rub off* on Laschet. The mere mention of Merkel in the treatment resulted in a higher rating for her fellow party member. Turning to Scholz, Fig. 4 shows the opposite pattern: the candidate of the Social Democrats was rated lower by respondents in the treatment group than by those in the control group. This effect is also statistically significant in a one-tailed *t*-test ( $p < 0.05$ ).

The findings thus suggest that the popularity of an incumbent may *rub off* onto a succeeding candidate of the same party. Furthermore, it seems that there was not only potential for her party's leading candidate to ride on the incumbency bandwagon but that his Social Democratic competitor Scholz could have lost approval. This contradicts some popular claims that the vice-chancellor in Merkel's cabinet benefited by making himself appear as a successor of the chancellor's

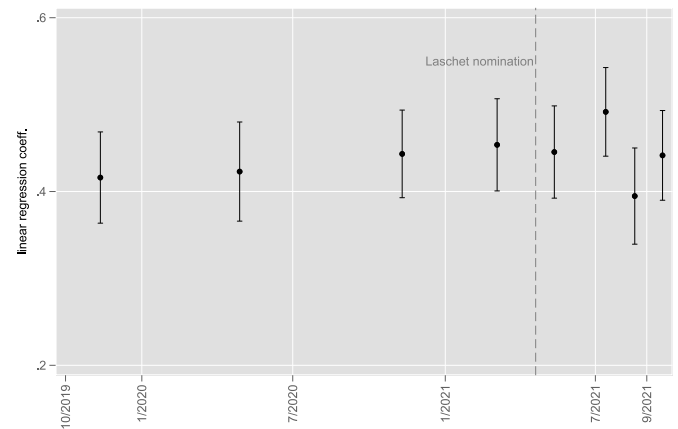


Fig. 5. Effect of Merkel on Laschet rating across GLES panel waves.

style of politics. Instead, it seemed that party allegiances mattered more than cabinet colleagueship regarding a *rubbing off*. Since we did not prime any category memberships, it appears that party affiliation is a much more salient mutual category in the minds of voters than belonging to the cabinet.

The *rubbing off* effect of Merkel on Laschet also turns up in the observational data, and in a remarkably stable manner: we regress the evaluation of Armin Laschet on his predecessor's evaluations in the individual waves of the GLES panel, analogous to Fig. 3. Results are shown in Fig. 5 (the respective regressions are shown in table A7 in the appendix): they indicate that Laschet did indeed profit from the good reputation of Angela Merkel. Throughout the observed time span, respondents' ratings of Angela Merkel had a significant and positive effect on their ratings of Laschet. Interestingly, in contrast to the finding that Merkel's direct effect on vote choices *washes off* to an extent, this *rubbing off* effect is rather stable over time. Even in the decisive stages of the campaign, how they viewed his predecessor Merkel mattered for citizens' assessments of Laschet.

### 5.3. Robustness checks

We address two potentially problematic aspects of our analyses in this section: first, the possibility of spurious correlations due to unobserved heterogeneity between respondents; second, a potential bias due to the sample harmonization across panel waves. As regards the former, Table 1 shows the results from regressions we computed across panel waves, with respondent fixed effects. The regressions show a positive, statistically significant coefficient of Merkel's evaluation for both the intention to vote CDU/CSU and Laschet's evaluation, strengthening the case for a causal effect. One possibility that we cannot rule out with this design is that of reverse causality. We are doubtful, however, that this would be a plausible claim even on a theoretical level, since it appears highly likely that the respective variables share causal relationships in both directions.

Another conceivable problem for our inferences is that we opted to analyze only respondents with valid responses for the variables we employ for all 19 waves. This greatly increases the comparability of the effects we find, but on the other hand biases the coefficients altogether: given the considerable effort and willingness this requires on the respondents' part, it seems highly unlikely that panel attrition occurs at random here. To gauge the magnitude of the bias that results from the harmonization, we repeat each regression with all observations that are available for the individual waves. Figures A1 and A2 in the appendix compare the effects found in this manner with those for our harmonized sample (the respective regressions are shown in tables A11 and A12). While they suggest a small degree of bias, they do not appear

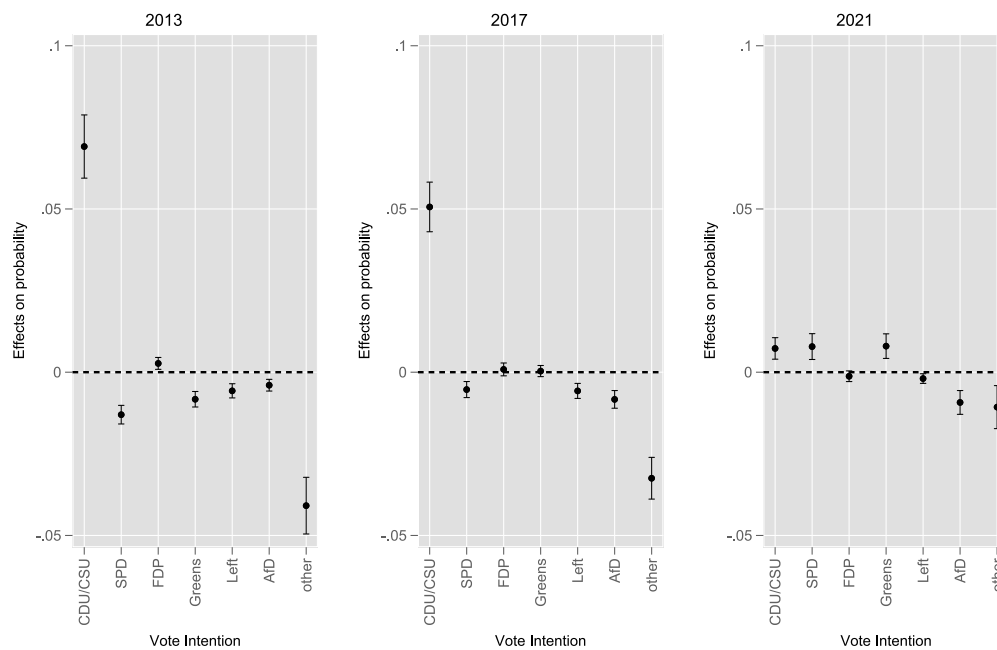


Fig. 6. Effect of Merkel ratings on vote intention in 2013, 2017 and 2021, GLES RCS.

Table 1

Logistic regressions of CDU/CSU vote intentions and linear regressions of Laschet ratings, with respondent fixed effects, GLES panel.

	(1) CDU/CSU vote intention (W1-W19)	(2) CDU/CSU vote intention (W12-W19)	(3) Laschet rating (W12-W19)
Merkel rating	0.379*** (13.37)	0.257*** (4.83)	0.181*** (10.72)
Laschet rating		0.160*** (4.08)	
Constant			-1.374*** (-63.27)
Observations	4104	1307	5928

t statistics in parentheses.

\*p < 0.05, \*\*p < 0.01, \*\*\*p < 0.001.

to fundamentally alter our conclusions: if anything, the *washing off* pattern in Merkel’s effect on CDU/CSU vote intention turns out to be more pronounced using the respective full samples.

#### 5.4. The bigger picture: Merkel’s effect on vote intentions across elections

Having specifically examined the *washing off* and *rubbing off* effects above, we turn to a broader perspective on how Angela Merkel impacted vote intentions more generally, and how this impact compared to those in earlier German elections. For that, we use the GLES RCS datasets of 2013, 2017, and 2021, and estimate multinomial logistic regression models with respondents’ intended vote choices as the dependent variable<sup>3</sup> and their rating of Merkel as the central independent variable. The models, like those presented above, control for age, gender, education, and party identification with each of the six larger parties.<sup>4</sup>

<sup>3</sup> We categorize respondents into seven groups: those who intend to vote for one of the six Bundestag parties and one residual category.

<sup>4</sup> In the analysis of the 2013 data set, we omit the dummy for AfD identification due to convergence issues.

Fig. 6 presents the conditional marginal effects of Merkel’s rating on the likelihood of each response category, for each of the three surveys (the respective regressions are shown in tables A8–A10 in the appendix). Merkel’s rating had a significant positive effect on CDU/CSU vote intentions in each election. However, two interesting contrasts between the 2021 election and the other two stand out: first, the effect in favor of the CDU/CSU is much smaller, commensurate with the *washing off* effect. Second, while in 2013 and 2017 Merkel’s evaluation worked almost exclusively in favor of her own party (apart from a positive effect in 2013 on the probability to state a vote intention for the FDP, which was the junior coalition partner at that time), in 2021 we see a statistically significant positive effect on vote intentions for the SPD and the Greens. This is quite an unusual finding: sympathy for a politician of one party not only increased the likelihood of voting for that party but also for two other parties. It may imply that in 2021 respondents who were very fond of Merkel but were not very keen on supporting the CDU/CSU primarily regarded these two parties as their alternative. This finding further contextualizes the results on the *rubbing off* effect. Just like incumbency effects in the conventional sense hinge to a large part on advantages in media attention, the transmission of popularity to new candidates may be conditional on high visibility of both the incumbent and candidate in the media. As we discussed above, Merkel was not very active in the campaign, which makes the real-world context (studied in the RCS) probably more akin to the experimental condition in which Chancellor Merkel was not mentioned. In this condition, Laschet’s ratings dropped, while Scholz benefited from Merkel’s absence. Consistent with this, the RCS results show that the CDU/CSU failed to retain the support of voters who were fond of Merkel, as some of them decided to opt for other political parties.

This link between the RCS and the experimental results invites speculation about Merkel’s role and the possible outcomes that might have resulted from an alternative approach by the incumbent chancellor: In our second experimental condition, we observed a clear benefit for Laschet when Merkel was mentioned, accompanied by lower ratings for Scholz. Therefore, it seems that if Merkel actually had played a more prominent role in the campaign, Laschet and the CDU/CSU could have benefited, as the allegiance of voters who favored Merkel might have been reinforced to support the CDU/CSU instead of a significant number of these voters voting for other parties. In practice, however, the results suggest that some of the potential assimilation effect did not

materialize: the CDU/CSU and Laschet apparently struggled to convince voters to see him as a clear successor to Merkel's legacy without her being present.

## 6. Conclusion

In this article, we addressed the question of how incumbents who do not run again for re-election influence voters' attitudes and electoral behavior. While there is a rich literature in political science on the advantages of incumbents over their contenders or the 'costs of ruling' for parties, little is known if and how incumbents might play a role in political competition after they decide not to run again. Building on previous research on incumbency advantages, 'costs of ruling', and evidence in social psychology that is stressing the importance of category membership for individuals' assessments of political objects, we derived two distinct mechanisms which we labeled the *washing off* and the *rubbing off* effect of the outgoing incumbent.

We studied these two effects using panel and cross-sectional data from the German Longitudinal Election Study (GLES) with a focus on the Bundestag election 2021, complemented by experimental evidence from a large-scale survey experiment we fielded in July 2021. Taken together, our results are in line with our expectations, indicating the presence of both a *washing off* as well as a *rubbing off* effect. Our analysis showed that, first, Angela Merkel was immensely popular at the end of her term not only with her own party supporters but across many voters from different parties. Second, although she was not competing and not particularly visible in the campaign, she still had an impact on vote intentions. Third, the direct effect of Merkel on a CDU/CSU vote intention *washed off* the closer the election was drawing even though it was far from disappearing fully at the end. Fourth, Merkel apparently also had a positive effect on the personal evaluation of her successor Armin Laschet: this *rubbing off* effect was shown in both our experiment with a subtle Merkel prime and the GLES survey data, while we find no such effect, and in fact a negative one, for Olaf Scholz in our experiment. Laschet never became very popular but still benefitted from Merkel's popularity — interestingly, this effect was also quite stable during the whole campaign.

Finally, looking at the effect of Merkel on vote intentions for all parties and not only the CDU/CSU, we find the interesting pattern that voters sympathizing with Merkel were not only more likely to vote for her party but also for the center-left parties of SPD and Greens. Merkel's popularity was thus not exclusively helping the CDU/CSU. From the perspective of social judgment theory, this suggests that category membership may not have been confined to Merkel's party affiliation and that voters' view of Merkel at the end of her tenure was not exclusively linked to her party.

To our knowledge, there is very little research on the dynamic aspects of social judgment, and almost exclusively on singular events that have a clear pre-post logic, such as political scandals (Herrmann and Tepe, 2018; von Sikorski et al., 2020; Close et al., 2023, but see Puente-Diaz, 2015). Gradual shifts of candidate and party evaluations over time, like we study them here with the effects of an outgoing incumbent, could be an interesting avenue for further research. Another aspect that we could not address in detail here are the institutional arenas the different actors belong to and the ramifications this could have for the decision behavior of individuals: Angela Merkel was in an executive position (arguably the most prominent one in Germany's government system), which obviously lead to very different effects than if she had only been a member of parliament. One possibility to clarify this would be to study the effect of outgoing party leaders or lead candidates who did not hold an executive position.

While we cannot ascertain whether or not the CDU/CSU would have obtained a better result if Merkel had been more visible in the campaign, our findings suggest a pathway for how she could have brought that about, namely by endorsing and promoting her successor more offensively. While never being evaluated positively, Armin

Laschet benefitted from the popularity of his predecessor, and arguably could have done so even more. Given that the CDU/CSU only fell short to be the strongest party group in parliament by 1.7 percentage points even a statistically small effect may have turned out to be substantially important.

Although our analysis focused specifically on the 2021 federal election, we think that this German case contributes to the wider literature on incumbency, candidate effects and vote choice. 2021 was the first Bundestag election without the sitting chancellor running as their party's candidate, but comparable situations occur not only on other levels of the German political system (Hainmueller and Kern, 2008), they are also observed in other countries and contexts: For a start, systems with term limits routinely create situations with an outgoing incumbent (Elis et al., 2010; Fowler and Hall, 2014). Incumbents who, although eligible, choose not to run again are less frequent, but not unheard of<sup>5</sup>: They include a variety of different cases such as the Netherlands (Ruud Lubbers in 1994), Portugal (Anfál Cavaco Silva in 1995), Spain (José María Aznar in 2004, José Luis Rodríguez Zapatero in 2012) and France (Jacques Chirac in 2007, François Hollande in 2017). Analyzing cases like these could deepen our understanding of how voters make up their minds when political actors change and how institutional as well as personal characteristics impact on categorization and assimilation effects. While Angela Merkel certainly is a particular case because of her extraordinarily positive appraisals by voters and her very long tenure as chancellor, it might be interesting to study other cases of outgoing incumbents, like unpopular incumbents who might become a liability for their successor, and further analyze comparatively how these effects vary in different institutional arrangements with a stronger or lesser focus on parties.

Overall, our analysis shows that one should not neglect long-term dynamics in political decision-making. Voters do not make up their minds anew for each election but are very much influenced by past political judgments and evaluations. This seems to hold true even for evaluations of incumbents who do not run anymore.

## Declaration of competing interest

The authors declare no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

## Data availability

Data will be made available on request.

## Appendix A. Supplementary data

Supplementary material related to this article can be found online at <https://doi.org/10.1016/j.electstud.2023.102698>.

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<sup>5</sup> Interestingly, the two-term rule in US presidential elections rested only on the precedent of incumbents not running again after two terms until codified in the constitution in 1951.

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