



Memo

To: Interested Parties

Fr: Simon Rosenberg

Dt: Tuesday, November 4, 2014

Re: Some Thoughts on Election Day, 2014

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Some thoughts on this very close election on a beautiful fall morning in Washington, DC:

**2014 Predictions: A Dead Even Race** – We enter Election Day with an enormous number of critical races in statistical dead heats. Making predictions in this environment is a bit tricky (wish the media had held back a bit more), but my [predictions](#) for 2014 were once again submitted to the Hill’s Election Prediction contest. Proud to have won this competitive contest [in both 2012 and 2008](#), I predict Democrats will end up with 51 Senators and control the Senate after the Georgia run-off. My admittedly optimistic analysis has been bolstered by the final WSJ/NBC poll, the last major media poll in the field this year. In what might be the poll closest to the actual results, it shows the national race dead even. Democrats have a 46-42 advantage with registered voters, and are tied in the Congressional Generic, Senate Battleground and in vote interest. These findings comport with many of the polls in the individual races these last few days showing them true toss ups, and the effect of strong Democratic ground games kicking in. [Analysis of the poll](#) from Chuck Todd, Mark Murray and Carrie Dann has this fascinating data showing the Congressional vote preference (Congressional Generic) progression from their previous polls:

Aug. 2014: GOP 49%, Dem 41% (GOP +8)  
Sept. 2014: GOP 49%, Dem 44% (GOP +5)  
Mid-Oct. 2014: GOP 46%, Dem 44% (GOP +2)  
Now: GOP 46%, Dem 45% (GOP +1)

**If the GOP Takes the Senate, Tenure Likely to Be Unstable, Short** – Even if the GOP takes the Senate, it is not clear who will really be in charge of the Congressional agenda. Whoever is the GOP’s Majority Leader will face challenges from a bigger pool of Tea Partyish hardliners in his conference; struggles with aligning with the even more conservative House; the challenge of having up to 4 members of the conference run for President; and perhaps most importantly, the difficult math of passing anything through the Senate.

For argument’s sake, let’s give the Rs 51 in the Senate next year. This means they will still need to get 9 Democrats on board to break any filibuster. Of the 34 Senators up for re-election next year, 24 are GOP held seats, just 10 are Democratic, and only 2 Democrats are likely to face tough races (even these – CO, NV – fair far better for Democrats in a Presidential year). For the Republicans 7 of these 34 seats come

in states Obama won twice and are likely to go Dem again in 2016 – FL, IA, IL, NH, OH, PA and WI. Of these 7, 4 – FL, IL, PA and WI – were won with less than 52% of the vote in a high water mark GOP midterm election. These Senators are simply going to have a hard time aligning consistently with the more conservative part of the conference as they will be facing Democratic electorates in their states next cycle. There will be no similar gang of Democrats being pressured to vote with the Rs, however. Given this it may be hard for the GOP Senate Leader to get to 50 votes on some major GOP priorities next year, let alone 60.

Pulling against this GOP “gang of 7” will not only be a more conservative Senate, but a more conservative House. Speaker Boehner had a hard time rallying his caucus behind his priorities in this Congress. The anti-establishment Tea Partyish wing of the GOP will be stronger, and the establishment wing weaker in the coming Congress. This means that whatever comes out of the House over the next two years is likely to be even more conservative than before. This will make getting to 50, and to 60, even harder in the Senate next year. Certainly one would expect President Obama to be far more aggressive in issuing veto threats early in these legislative fights to put even more pressure in the Senate for Dem heavy Rs and more conservative Dems to oppose whatever comes out of the Republican House Majority.

The Senate map is so favorable to Democrats in 2016 that it will put the Rs on the defensive politically from day one, something that may encourage McConnell’s team to be even more cautious of the hard line House than usual. Taken together, it is a bit hard to see how the Republicans can make their possible new found control of Congress anything other than messy. The issue next year will not be what President Obama does – his agenda is well established at this point – but what can this new unstable and fragile Congressional majority do.

**Not A Lot of Good News in the 2016 Map for the GOP** – At this point, it doesn’t look like the GOP has done very much to weaken the Democratic Electoral college advantage of recent years. Most of their Senate wins will come from outside the Presidential map. In critical 2016 states – FL, GA, MI, PA, WI – the GOP is showing ominous weakness in Senate and/or gubernatorial races. Hard to argue that dead even Senate races in CO and IA are big bright spots, though the GOP’s success in Ohio this cycle could become significant in 2016. Whatever GOP strategic gains might come from Ohio moving to be a true Presidential toss-up are likely to be offset by Democrats adding two Red states – AZ and GA - to their 2016 targets.

All of this comes against the backdrop of an electorate becoming 2 percentage points less white every four years, making the GOP’s 2016 Presidential Hill that much higher to climb. In 2012 the electorate was 72% white. Due to inexorable population trends, it is estimated to be just 70% white in 2016. Additionally, far more Millennials will be of voting age in 2016, and though the Dem advantage with this group may not be what it was, it is still significant and there will be more of them in coming elections. The math means that even a lower vote share for Democrats with Millennials in 2016 might not

translate into the GOP gaining any additional net vote given the expanding voting age Millennial population.

**No Evidence of Any Big Shifts in the Hispanic Vote** - Election Day may tell a different story, but today there is no evidence of a statistically or politically significant shift in the Hispanic vote in the US. The most recent [Pew Hispanic poll](#) – perhaps the most credible independent poll of Hispanics - released just a week ago has the 2014 Hispanic vote at 2-1 Democrat, 57-28, or about where Obama ended up in 2008. Diving deeper into the data, the favs/unfavs also show 2008 level numbers, which of course may leave the GOP a bit better off than 2012 but far away from being competitive at the Presidential level. In their pre-election poll from a few weeks ago, the Democratic leaning pollsters at Latino Decisions [have the numbers even worse right now](#) for Republicans: 59-25 in 2014, and 55-20 in 2016. And in their [recent state polls](#) in CO, FL and NC traditional Democratic advantages are holding, and there is no sign of Republican gains.

The Pew Hispanic poll has data which suggests that advocates on both sides may have exaggerated the impact of the President's delay in taking Executive Action on the Hispanic vote. Only 24% of Hispanics in this poll say they are unhappy (disappointed/angry) with the delay in Executive Action, and only 6% say they are angry. 76% either had no opinion about the delay, or supported it – three times as many as were disappointed or angry. These findings reinforce that what we are seeing is a slight dip in support for Democrats in this community but no real structural change.

Claims from Republican interests of their gains with Hispanics thus seem to be far more wishful thinking than data-driven analysis at this point.

And while the possibility of a Bush on the ballot in 2016 might improve the Rs standing with Hispanics, the underlying trends are far worse for the Republican Party than is commonly understood. The last four years has seen a dramatic escalation by the GOP in [advancing policies hostile to Hispanic](#) and immigrant interests, while Democrats have perhaps advanced an agenda that is among the most pro-Hispanic and immigrant of the modern era. Depending on the candidates the two sides choose, and the agenda their allies in Congress advance, it is far more likely that over the next two years the Democrats will be able to make this stark contrast clearer they have this cycle than the opposite taking place - the Republicans switching core positions on things like the ACA, minimum wage, opposition to CIR and the President's coming Executive Action, deportation of DREAMers, cutting federal education spending and advocating voting restrictions. Remember that the only potential 2016 GOP candidate with an unequivocal embrace of Comprehensive Immigration Reform is Jeb Bush. So there is no real evidence in the data of GOP gains with Hispanics, and the path for them to regain critical lost ground seems politically out of reach.

**Our System Needs Reform** – Assuming the GOP takes the Senate tonight, in just three elections the US political system will have given one Party its biggest back to back majorities at the Presidential level in 70 years will also stripping both Houses of Congress from that Party and giving it to their opposition. From a political science/design standpoint, it is frankly hard to produce election results like this in a political/electoral system even if one tried.

And it gets worse. In 2012 Democrats won more one than 1 million more votes in the House than the GOP but didn't win the chamber. In 2014, according to the latest major national poll, registered voters favor the Democrats 46-42, and likely voters are split evenly 46R-45D. Yet the Republicans are likely to make significant gains in both the Senate and House. It is at this point a realistic possibility that the Democrats could win more votes nationally in 2014 and end up with the GOP controlling both Houses of Congress. Results like these should raise legitimate questions about whether something has gone wrong with the way our democracy works these days, and reinforce the need for the center-left to make [political reform](#) one of its highest priorities in the years ahead.

In a recent essay, I raised related questions about whether with so few people voting in contested races every two years our democracy is still capable of providing the [“consent of the governed”](#) as imagined by The Founding Fathers. And of course there are many other issues – the role of money, the difficulty of voting, the pernicious development of a true small state basis in our Congress, the anachronistic Electoral College and more. I hope in the coming months the chattering classes in Washington can start having a serious conversation about what is happening in our political system, and whether there are things we can do to make it better.

**The DNC Should Have A Single Minded Mission: Expanding the Electorate** – The return of the mid-term turnout problem for Democrats, and what appears to be early evidence of success in mitigating it in targeted Senate races, suggests a new and very concentrated mission for the DNC: single minded focus on closing this gap, and advancing efforts to make it easier for people to vote in all 50 states. While these efforts are already underway at the DNC, they needed to be stepped up, funded and staffed at a level commensurate with the challenge.

**Can a Party Run Away From Its Own President in the Mid-Terms?** I have long doubted that a Congressional Party has the capacity to distance itself from its own Presidential candidate or President. I fall in the camp that believes Democrats should have found a way to run on their record this cycle, as 6 years of a Democratic President has made once again made the nation far better than he found it (been true of both Clinton and Obama, not true of either Bush). Whether that narrative was an easy one to sell or not we will never really know for while it is statistically true it was never really tried. Democrats managed to get all of the downside of President Obama this cycle and far too little of the upside.

The across the board policy successes of President Obama on the economy, deficit, health care reform energy policy and border security also leaves the GOP very little running intellectual and policy running room in the next Congress, and reinforce how little of a mandate the GOP will have in 2015-2016. Will be interesting to see how exactly GOP leaders criticize plummeting deficits, gas prices, unemployment and uninsured rates; declining costs of health care; very strong stock market valuations and GDP/growth rates; significant advances in renewable and traditional energy production; and a net undocumented flow of zero and declining crime rates all along the US-Mexico border. Do we think in any kind of serious and sustained debate the GOP will be able to convince the US public that Obama has been a bad President given all this, and that they somehow could have done a better job? Assume this is possible, but it sure isn't a given.

Finally, in what should be one of the major stories of 2014, the total meltdown of the conservative experiment in Kansas, and the struggles/loses of GOP governors in FL, PA, MI and WI reinforce that while 2014 might be a good election for the GOP politically, it has not been a good one for them ideologically. A dead even national vote, power potentially granted by a handful of races decided by a few thousands votes, no big argument, significant setbacks and struggles in big states does not a mandate make. The potential for overreach by a new GOP Congressional majority is very real, and may be hard to avoid.

**More to Come** - Look for an update (and perhaps corrections) later this week.

*NDN's Corey Cantor also contributed to this memo.*

#### **Other Items We Found Helpful**

Ronald Brownstein: "[The Tectonic Plates of 2014](#)," *National Journal*.

Norm Ornstein: "[A Republican Victory Could Splinter The Party](#)," *National Journal*.

Nate Cohn: "[Why 2014 Isn't Good As It Seems for the Republicans](#)," *New York Times*.

Joe Rospars: "[Obama Digital Guru to Democrats: Stop Being Lame](#)," *Time Magazine*.

Jill Lawrence: "[A Wasted Opportunity for Democrats](#)," *National Memo*.

Patrick Egan: "[Welcome to the Most Unrepresentative Senate election since World War II](#)"