

CONVENTIONAL WISDOM UPENDED – AN ANALYSIS OF THE US MIDTERM ELECTIONS

Last week, Democrats defied conventional wisdom, upended both mainstream media and political press predictions and delivered in the [words](#) of President Biden a “good day, I believe, for democracy.” For the first time since 2002 (and, before that over the past 100 years, only in 1934 and 1962 – *see* [UCSB](#)), when Republicans rode a wave of 9/11-inspired patriotism and, as the party in power, actually gained seats in the midterms, the party in power had an unexpectedly respectable showing. The Democrats did so notwithstanding paramount concerns over the economy, with inflation at a 40-year high, and presidential approval ratings hovering in the low 40s.

It is impossible to overstate the impact of *Dobbs* on voter turnout, individual races and ballot initiatives. Republicans must rue the day *Roe* ceased to be the holy grail of conservative messaging, giving Democrats the opportunity to recapture more powerful messaging – personal freedom.¹ And while protection of democracy was not expected to be seen as an animating factor, it appears that, for many supporters of reproductive freedoms, their concerns over abortion were linked to concerns about the future of democracy in the country. Ultimately, it appears that swing voters were more concerned about how Republicans handled reproductive rights than how Democrats handled the economy and inflation. Those concerns were heightened across voting districts by the Trump effect on the GOP (see below).

In a welcome reversal of a trend that crystallized in the early 2000s, Democrats have become far more disciplined in their focus on state legislative and other state-level races, delivering wins in gubernatorial, state legislative, secretary of state and attorney general races. In another reversal, ticket-splitting appears to have made an ever-so-slight, but nonetheless perceptible, comeback, suggesting a weariness among some voters for hyper-partisanship. There does appear to be a Rubicon out there.

The snapshot:

- With Catherine Cortez Masto, the first (and only) Latina elected to the Senate, prevailing in the NV Senate race (with a 0.7% margin), the Democrats hold the Senate (but the hoped-for 52/48 split to more easily deliver on the Biden agenda is out of reach; at best, it will be 51/49 if Sen. Warnock wins the GA runoff). There is a critical difference between 50/50, and 51/49, in that the former triggers a Senate power-sharing rule that dramatically slows down legislation. An actual one-seat majority means clear Democratic control, with the ability to fast-track legislation and nominees.

¹ In an [interview](#) published in Vox explaining the salience of *Dobbs*, Democratic election analyst David Schor made the point that voters have a tendency to punish lawmakers for undertaking radical change, which is one explanation why the party in power tends to do poorly in midterms. This time, the GOP was tarred with a hugely unpopular change – prompted by the composition of the Supreme Court – when they neither controlled the White House nor Congress. Democrats benefitted in this case from being seen as the party of the status quo. It was, he said, “both historically unusual and quite powerful.” In this context, incumbency also helped individual races.

- The GOP will control the House by a narrow margin (*see* [New York Times Tracker](#)). At best, the GOP will have an extremely narrow majority (of up to five seats).
- Democrats flipped four Republican-held state legislative chambers and three Republican-held governorships. Democrats did not lose control over any state chambers they currently control. As a result of legislative and gubernatorial wins, Democrats notched up four new trifectas (MN-after flipping the Senate), MI (after flipping the House and the Senate), and MA and MD (after winning the two gubernatorial races), and lost one in NV (after losing the gubernatorial race). *See* [NCSL State Elections 2022](#), published by the National Conference on State Legislatures. According to the NCSL, the party in power has lost state legislative seats in all but two elections, 1932 and 2002.
- Election deniers, while diminished, are by no means vanquished.
- We count Trump out at our peril (though we can be grateful that, as was the case with his intervention that likely delivered Senate control in the 2021 runoffs, his endorsements have come at a measurable, steep price for the GOP and a measurable boon for Democrats.²

Conventional Wisdom

According to data [compiled](#) by NBC News, historically, when voters feel the country is on the wrong track, the president's party has suffered significant losses in the midterms. In 1994, with 57% of voters feeling the country was on the wrong track (a negative 28-point margin), the Democrats lost 54 House seats and eight Senate seats. In 2010, with 60% feeling the country was on the wrong track (a negative 29-point margin), the Democrats lost 63 House seats and six Senate seats. When the president's approval rating has been in the mid-40s, his party has lost an average of 37 seats House. In 1994, Clinton's approval rating was 46%, and in 2010, Obama's approval rating was 45%. Overall, according to the Washington Post, since LBJ, new Democratic presidents have lost an average of 45 House Seats and five Senate seats in midterm elections.

The National Republican Congressional Committee had projected winning as many as 30 seats. They needed to net only five seats to win the majority of 218. Over the summer, the rallying cry at gatherings of the Democratic party faithful shifted noticeably in tone and passion, "Republicans have no idea how angry we are. They are about to find out." We all did.

Exit Polling³

According to NBC News [exit polling](#), inflation ranked first as the top issue overall for voters (31% of voters), abortion was second (27%), followed by gun policy and crime (11% each)

² A number of races have yet to be called, and in many not all ballots have been counted. Percentages are current as of the date of this briefing note, based on the New York Times [Live Election Results](#) page.

³ Even in the best of times, polling is anything but an exact science. The information reflected in this briefing note is based on preliminary analyses undertaken over the course of just a few days. Methodologies differ. *See, e.g.,* a [comparison](#) published by the Washington Post of an exit poll conducted by Edison Research and one by AP VoteCast.

and immigration (10%). Overall, 61% of voters were “angry” or “dissatisfied” with *Dobbs*, while 37% were “satisfied” or “enthusiastic.”

- Republican voters cited inflation and immigration as the most important issue that determined how they would vote. Democrats overwhelmingly cited abortion as the most important issue, followed by gun policy.
- Republicans overwhelmingly were satisfied or enthusiastic about *Dobbs*, while even higher proportions of Democrats were angry or dissatisfied with *Dobbs*.

According to CNN [exit polling](#), only 24% of voters felt the economy was doing well (“good” or “excellent”), and 59% of voters felt abortion should be “legal in all cases” (29%) or “legal in most cases” (30%). Support for abortion was highly partisan, with 86% of Democrats saying abortion should be “legal in all cases,” and 60% saying “legal in most cases.” Among Republicans, only 11% felt abortion should be “legal in all cases,” and 38% said in some cases. There was a connection to be made, though: speaking after her victory, Gov. Whitmer noted that “the ability to decide when and whether to have a child is the *biggest economic* decision a woman will make over the course of her lifetime. And that's why we kept that front and center too.”⁴

A Third Way [analysis](#) concluded that voters split their tickets in major statewide races, choosing mainstream Democratic candidates against extreme Republicans. “Although turnout was low in Biden counties in battleground states, making the electorate about two points more Republican-leaning than the last election cycle, Democrats were able to outperform Biden’s support by persuading swing voters.” Citing AP VoteCast data, Third Way found that, while Republicans outnumbered Democrats by four points, Democrats held or flipped seats in many districts by appealing to Independents, and winning them over overall by four points.

CNN exit polling showed President Biden with a 45/54 disapproval/approval rating, with less favorable ratings in key battleground states. Yet, 48% said the President was not a factor in their House votes. NBC News, based on exit polling, in trying to [explain](#) the outcomes of the week focused on swing voters who only “somewhat” disapproved of Biden, finding:

- They made up 10% of all voters, and broke for Democrats over Republicans by 4 points nationally, 49% - 45%.
- In GA, they backed Republican Brian Kemp over Democrat Stacey Abrams in the gubernatorial race by 16 points, 57% - 41%, but preferred Rev. Warnock over Herschel Walker, only 50% - 44%, a 22-point swing.
- In NH, GOP Gov. Chris Sununu won these voters (59% - 39%), but so did Democrat Sen. Maggie Hassan (72% - 25%).

⁴ As Ana Marie Cox noted, writing in an NBC [analysis](#), the assumption that abortion would not top the list of voter concerns was not technically incorrect. What pundits failed to take into account was that only a narrow cohort of voters are true single-issue voters. Concern about the economy can easily extend to fears about unplanned pregnancies and fears about crime can as easily extend to the criminal penalties where abortion is banned.

- In NV, GOP gubernatorial nominee Joe Lombardo carried them (52% - 40%), but so did Democratic Sen. Catherine Cortez Masto (47% - 44%).
- In WI, GOP Sen. Ron Johnson won them (51% - 48%), as did Democratic Gov. Tony Evers (56% - 41%).

Harry Enten of CNN [said](#) that of the 18% who viewed neither Biden nor Trump favorably in the exit polls, 40% of them voted for Democrats. In 2010, a September CNN poll had Democrats winning just 21% of those who viewed neither Bush nor Obama favorably.

I have included additional data on demographic preferences and turnout in an annex to this briefing note.

Democracy

Many high-profile pro-democracy candidates prevailed.

- Jocelyn Benson was re-elected as MI Secretary of State (55.9%), WI Gov. Tony Evers (51.2%) and MI Gov. Gretchen Whitmer (54.1%) also were re-elected. Jocelyn's opponent, who insisted Trump had won MI in 2020, lost by 14 points. Election denier candidates running for Secretary of State in MN and NM also lost.
- Josh Shapiro won the gubernatorial race in PA (56.2%) and John Fetterman won the PA Senate race (51%), flipping the seat held by retiring GOP Sen. Pat Toomey. PA GOP gubernatorial candidate Doug Mastriano, who led the PA election-denial effort, was at the Capitol on January 6th and participated in a video prayer call where he spoke of "seizing power" and called on leaders to "rise up" on January 6th, lost by 14 points. Mehmet Oz is also an election denier.
- In AZ, Mark Kelly won re-election to the Senate (51.8%) and, in the AZ Secretary of State race, Adrian Fontes defeated (52.4%) Mark Finchem, an election denier who had marched to the Capitol on January 6th, once identified as a member of the Oath Keepers, was a major proponent of the Maricopa "election audit" and called for the 2020 election to be decertified (a process that does not exist).
- Also in AZ, in the last major race to be called, Secretary of State Katie Hobbs defeated former television news anchor Kari Lake in the gubernatorial race. This was a narrow (50.34%) but definitive rebuke of election denial. Lake had linked her race to the Big Lie and emerging as one of the most prominent and outspoken defenders of Trump's lies. Hobbs had campaigned largely on abortion rights and had refused to be "part of the spectacle" and debate Lake, whom she had labelled a "conspiracy theorist."
- In NV, Catherine Cortez Masto narrowly defeated Adam Laxalt to win another term in the Senate. Adam Laxalt was co-chair of the NV Trump campaign and filed lawsuits to overturn the 2020 result, claiming the election was rigged. NV was deemed one of the best GOP pick-up opportunities as both contenders were polling within the margin of error. Cortez Masto campaigned on abortion and attacked Laxalt for questioning the 2020 election results. This election was particularly fraught for Democrats with the passing of former Senate Majority Leader Harry Reid, who had built a powerful machine in the state. Three of the four Democratic House incumbents up for re-election also won in races heavily targeted by GOP money.

[Talking Points Memo \(TPM\)](#) highlighted that high profile election deniers largely had bad midterm elections. However, when one drills down into the larger group, the picture is mixed. TPM cited a [CBS News](#) estimate of 308 out of 597 Republicans running in midterm elections qualifying as election deniers and FiveThirtyEight [estimates](#) that 60% of voters would have an election denier on their ballot. Not only were election deniers (see my previous briefing note, available [here](#)) on the ballot, but some also suggested that if elected they would carry their crusade forward.

The New York Times undertook its own [analysis](#) of statements made by GOP candidates across all 50 states and concluded that more than 370 had cast doubt on the 2020 election in some way. Of those, around 180 (more than half) won their elections, and most were elected to the House. Around 30 explicitly said the 2020 election was rigged or stolen, while the balance cast doubt about the election in less extreme ways. The New York Times found 17 Republican election-skeptics in the Senate, and more than two dozen were elected to state offices.

The good news though is that, as Caitlin Dickson and Andrew Romano, in a [post](#) carried by yahoo!news, noted, as election administration is a state responsibility, the results most relevant to the 2024 election are the outcomes of the governor, secretary of state and attorney general races.

States United [reported](#) that (as of yesterday), overall, of the 94 races for governor, secretary of state or attorney general, 141 election deniers ran, 46 made it through the primaries and only 14 won (in 10 states). All were in districts that Trump won twice. No non-incumbent election denier won a gubernatorial race and only two non-incumbent election deniers (out of 31) won attorney general races (in Idaho and Kansas). Of the 27 races for Secretary of State, only three new election deniers won (in Alabama, Indiana and Wyoming). Thus far, in only 10 states did an election denier win as a governor, secretary of state or attorney general.

As for QAnon conspiracy theorists, according to a New York Times [analysis](#), three (Lauren Boebert (who won), Marjorie Taylor Greene (who also won) and J.R Majewski (who lost to Marcy Kaptur)) underperformed Trump, while most House Republicans outperformed Trump, and in each case, the Democratic challenger had a higher margin than in 2020.

In the remaining Senate race, the Republican challenger (Herschel Walker) is an election denier. Among other election deniers who lost were Don Bolduc, who failed in his bid to oust Maggie Hassan in NH, Dan Cox who lost his MD gubernatorial race against Wes Moore and Darren Bailey, who lost his IL gubernatorial race against J.B. Pritzker, and Jim Marchant, who lost his bid to serve as NV Secretary of State.

While the legacy of *Shelby County* and *Brnovich* delivered racial gerrymandering and partisan maps, fair maps prevailed in MI and PA (*see* Brennan Center, Democracy Wins the 2022 Midterms).

Reproductive Freedoms

By framing the *Dobbs* decision as an assault on freedom, personal choice and individual rights, and abortion restrictions as government mandates (government in the waiting room), Democrats deployed messaging that resonated successfully across party lines.

- Voters in MI (57%), CA (65%) and VT (77%) affirmed abortion rights in state ballot initiatives.
- Voters in KY, where abortion currently is banned, rejected an amendment (52%) that would have said there was no right to an abortion, at the state level.
- Voters in MT (53%) also rejected efforts to restrict abortion.

In MI, Gretchen Whitmer (54.5% of the vote), Jocelyn Benson (55.9%) and Dana Nessel (53.2%) won their state-wide races, and Elissa Slotkin (52%) and Dan Kildee (53%) fended off challengers and Hillary Scholten (55%) flipped a seat, all in House races that were considered very much at risk for Democrats. In addition, the MI state legislature flipped to Democratic control, the first time in 40 years, giving Democrats a trifecta of control. These races all benefitted from the abortion tail winds, and abortion was at the core of the campaign messaging. The MI abortion ballot initiative received 53,000 more votes than Whitmer did against her opponent, the Trump-endorsed Tudor Dixon.

In OH, Nan Whaley’s reproductive rights messaging was not the silver bullet she needed in her gubernatorial bid.

According to analysis of the impact of *Dobbs* on the midterms, [KFF/AP VoteCast](#) reported:

- About a quarter of voters cited *Dobbs* as ***the single most important*** factor in their midterm vote. This increases to more than three in ten among some groups that tend to be pro-choice, including Democrats (37%), younger women (34%), first time voters (38%), and those who say they are angry about the Court’s decision (43%). These groups were more likely to say *Dobbs* had a “major impact” on their voting decisions – both as to turnout and which candidates to support. Majorities of Black and Hispanic women also report *Dobbs* impacted their voting behavior, and older women of color were more likely than older White women to report this.
- Voters who said *Dobbs* was the single most important factor in their vote went more than 2:1 for Democratic candidates. Democrats also had the advantage of voters who were angry, as eight in ten cast ballots for Democratic House candidates.
- There were several states with competitive races where *Dobbs* may have played a role in motivating voters both to turnout and to vote for candidates who share their opinion on abortion access. In PA, *Dobbs* was the most important factor in the vote of about one in ten Republican voters, and 21% of these Republican voters cast ballots for the Senate Democratic candidate. A small share overall, but it was an election where small margins mattered. A majority of key voting groups in PA, including younger voters, women 18-49, and voters who supported Democratic candidates also said *Dobbs* had a “major impact” on their decision to vote and who they supported.
- In states with reproductive rights ballot initiatives, *Dobbs* was an even stronger driver of turnout for women 18-49. Large shares of women voters under 50 in each of the four states said *Dobbs* had a “major impact” on whether they voted, including more than half of women voters under 50 in CA (55%), MI (55%) and VT (51%), and nearly half (45%) of KY women voters under 50. One takeaway from this is that ballot measures are very likely to be the way forward to enshrine protections of reproductive rights as a matter of state law.

Other Results/Takeaways

- Democrats blocked a super majority in NC, which would have allowed Republicans to override Democratic Gov. Roy Cooper's veto and enact a six-week abortion ban. Democrats appear to have done the same in WI and MT.
- Democrats won governorships in MA (Maura Healey), MD (Wes Moore, only the third Black governor of any state since Reconstruction) and KS (Laura Kelly)
- WI benefited from same day registration, with a surge of new young voters, particularly women. The Leadership Now PAC ran a campaign aimed at business leaders and swing voters that had over 4 million views.
- The GOP surged in NY (which has not, for example, had a Republican governor since 2002) and, while Gov. Kathy Hochul beat challenger Lee Zeldin (52.9/47.1), her margin of victory was far narrower than it should have been and the GOP flipped four seats, including Sean Patrick Maloney's (the DCCC Chair). Max Rose was unable to reclaim the seat he lost in 2020, and NY-19, which had flipped in the special election triggered this summer (when Antonio Delgado was appointed Lt. Gov.) in favor of Pat Ryan, flipped back to Ryan's then Republican challenger; Pat Ryan, having run this time in NY-18, won by a narrow margin.

That Democrats lost in what should have been a reliably Democratic backyard is being attributed to a chaotic redistricting process, a lackluster Hochul campaign, and the fact that *Dobbs* did not have the same resonance in New York State as it did elsewhere. (Incidentally, abortion had less resonance as well in NV and OR, where abortion rights are not seen as at risk, at the state level). Anecdotally, Democrats in NY cited the lack of a concerted Democratic voter outreach effort.

Perhaps the most significant contributor though was voter concern over public safety in New York City (by voters in the city and in neighboring Suffolk and Nassau counties), and the perceived failure of Democrats to have a plan, let alone be willing to confront the issue. While incidents of violent crime remain at historical lows, according to a [Bloomberg](#) report, the perception of out-of-control crime flows from a series of high-profile incidents and the fact that Mayor Eric Adams has made fighting crime a core issue. (See also [Quinnipiac](#) polling.)

The results in New York have set off furious finger pointing within the Democratic party.

- In Washington, Kim Schrier fended off a heavily targeted challenge (52.1%), as did Marie Gluesenkamp Perez, who ran as a rural Democrat and small business owner on abortion access and fighting climate change, as well as protecting Second Amendment rights; her Trump-endorsed opponent, who was expected to win in a Trump +4 district, won his primary against one of the Republican House members who voted to impeach Trump (in the second impeachment). He denied the legitimacy of the Biden win in 2020 and had supported arrested January 6th insurrectionists. FiveThirtyEight had [given](#) Gluesenkamp Perez 2-in-100 odds of winning.
- Due in part to the Chase Oliver third-party run, the GA Senate race heads to a runoff.

The Trump Effect

As Susan Glasser, [writing](#) in the New Yorker, noted, pundits focused too much on President Biden’s approval rating and not sufficiently on Trump’s worse ratings. It defies logic that the twice-impeached former president, who twice lost the popular vote and, in 2020, delivered the White House, the Senate and the House to Democrats commands the loyalty of much of the senior Republican Party leadership and millions in MAGA world. Few dare to stand up publicly and call him out for what he is.⁵

Many voters found the Trump noise, two years after his failed bid for a second term and two years during which the Big Lie has animated so many of the GOP talking points, to be too much. “Candidate quality” (a euphemism for calling out the crazies on election denial) became a dominant factor, and a number of election deniers lost, but many did win.

The midterms delivered neither the revenge Trump sought nor the triumph that would serve as the opening act of the launch of his 2024 bid. According to an [article](#) in POLITICO, over the course of the 2022 cycle, Trump endorsed over 330 candidates, raised significant amounts and held 30 rallies. He relishes the kingmaker role, but voters largely rejected his more high-profile endorsees. One notable exception was JD Vance, though his victory in the Senate race over Tim Ryan (53.3/46.7) may be more of a confirmation of the continued drift of OH to the right. Vance was a victim of ticket-splitting as he was almost 10 points behind Gov. DeWine’s margin.

By way of recap, among the more-high profile Trump endorsements:

Won	Lost	Yet to be called
Tedd Budd (NC Senate)	Kari Lake (AZ governor)	Herschel Walker (GA Senate)
Katie Britt (AL Senate)	Dan Cox (MD governor)	
Eric Schmitt (MO Senate)	Doug Mastriano (PA governor)	
	Blake Masters (AZ Senate)	
	Don Bolduc (NH Senate)	
	Adam Laxalt (NV Senate)	
	Mehmet Oz (PA Senate)	
	Bo Hines (NC-13)	
	J.R. Majewski (OH-9)	
	Karoline Levitt (NH-1)	
	Yesli Vega (VA-7)	

POLITICO [summed up](#) the Trump effect – torpedoing his own party, as follows:

- In NV, home to three of the nation’s tightest House races and one of its most competitive Senate contests, 29% voters said their vote was in opposition to the former president, and all four remained Democratic
- In IL, MI and PA, where 11 House races were rated lean D or toss-up, all ended up in Democratic hands, aided by the drag on the GOP ticket of the Trump-endorsed, hardliners.

⁵ The leadership had the chance, by convicting Trump in the second impeachment, to permanently bar him from federal office. At the decisive moment, best illustrated by the punch line of Mitch McConnell’s speech, which veered sharply away from the logical conclusion of all but the final moments of the scathing indictment of Trump, Senate Republicans failed to do so.

- Two GOP-held House seats flipped after Trump helped oust their incumbents as a payback for their impeachment vote.
- GOP chances in New England fell short after a handful of top GOP House candidates lost. In NH, where two of them failed and Sen. Hassan won reelection, 32% of voters said they voted to oppose Trump.
- In PA, Democrats also flipped the GOP-held Senate seat, despite Biden’s approval rating of 46-53. Trump, was even more unpopular, at 40-58, with 26% saying their vote was to oppose Trump, and 91% of them voted for Fetterman over Oz.

It had to be an interesting night at Mar-a-Lago as the election returns came in and the spotlight shifted to Gov. Ron DeSantis, with his decisive 20-point margin, both in rural areas and in Miami-Dade. Trump may still be looking to play kingmaker in GA, though that may not be a winning strategy in light of Joe Biden’s GA win in 2020, the victories of Jon Ossoff and Rev. Warnock in the 2021 runoff, and the victory of Brian Kemp against Trump-endorsed David Perdue in the 2022 GOP primary.

Trump has announced he will seek a second term. George Conway III, writing in the Washington Post, [captured](#) the motivation: Trump was always going to run – he could not help himself. “His narcissism, his megalomania, his delicate yet illimitable ego, would have it no other way. Donald Trump craves the power. Even more, he craves the attention. And more than ever – after an unprecedented two impeachments, a humiliating reelection defeat that he can’t even admit, and amid multiple criminal investigations and civil suits — he seeks vengeance.” Echoing a growing consensus, Conway concludes that what ultimately drives Trump is his belief that his presidential run and his ability to incite political violence among his base will protect him from what he fears most, criminal prosecution. We do not have to guess, Trump, in an echo of Lindsey Graham’s prediction of “riots in the street,” warned in a September interview of “big problems” if he is indicted.⁶

⁶ Commentators have suggested that the easiest route would be a federal prosecution over the Mar-a-Lago documents, based on willful retention of classified documents and possibly obstruction of justice, which would avoid the questions of intent and state of mind required for prosecution relating to January 6th. Many have raised the question of what would prevent Trump from becoming president were he to win the 2024 election. Indictment or even incarceration would not disqualify him from running or serving, under the Constitution. That leaves open the question of whether the bar to holding federal office provided for in Section 3 of the [14th Amendment](#) would apply, the predicate for which would have to be a finding that Trump engaged in insurrection or rebellion. This brings us back to whether the January 6th events would form part of a DoJ indictment. Even then, experts are split on what action would be needed to give effect to the bar. The January 6th committee has yet to issue its final report; even if the committee is, as expected, shut down under the new Congress, the DoJ efforts should be unaffected.

In the meantime, prompted by Trump’s announcement that he is running in 2024 and the assumption that Biden also will run in 2024, and the potential conflict of interest posed by the pending investigations, Attorney General [announced](#) the appointment of a special counsel to oversee the dual criminal investigations, into whether any person unlawfully interfered with the transfer of power following the 2020 election or the certification of the electoral college vote, and into the Mar-a-Lago documents and possible related obstruction of justice.

There is also the ongoing investigation of Trump by the Fulton County District Attorney for violations of the Georgia election laws. An updated [report](#) from Brookings, authored by a team

Punditry Rejected

Neither the feared red wave nor red tsunami materialized. Voters rejected, in the words of Charles Blow [writing](#) in the NYT, punditry. In spite of the generic ballot that Democratic operatives continued to point to that showed extremely tight races, the mainstream media, building on predictions from the political press, largely got it wrong on both voter turnout and voter intention.

- We were led to believe that voter sentiment had shifted again in the past few weeks in favor of the GOP, but that simply was not the case.
- We have been warned not to view Latinos as a single voting bloc, but the pundits/political commentators then seemed to ignore those warnings and reach the wrong conclusion. While Latinos in South Florida may be more firmly in the Republican camp, that does not appear to have been the case in TX or NV.
- Pundits/political commentators seem to have concluded that it was folly for Democrats to focus so much attention on abortion and the fragility of democracy, at the expense of crime and the economy. The reporting overlooked the fact that House Democrats were running local messaging, and crime and the economy often were not ignored. Ultimately, campaigns in battleground states benefited from a surge in support for reproductive freedom.

Concluding Thoughts

The key themes:

- As politics go, Monday was the first day of the 2024 cycle. Democrats will be defending 21 seats (including in three states won by Trump in 2020), compared to 10 GOP seats (none of whom are in states won by Joe Biden in 2020); two independents who caucus with the Democrats are also up for re-election. As Senator Mark Warner noted in a fundraising email, a Warnock victory in December is a down-payment on holding the majority in future Senate elections.
- “The hour has come for a new generation to lead the Democratic caucus.” With those words, Speaker Nancy Pelosi announced that she would not again seek to lead the Democratic caucus. She was one of the most consequential politicians of our time, the most powerful woman politician in Washington, the first woman to be elected speaker of the House who would go on to serve alongside four presidents and the second in line to the presidency. She was a leader who played a pivotal role in navigating the acrimony now endemic in our polarized political world and repeatedly delivered legislation out of an ideologically divided caucus. Among so many, her accomplishments likely to live on through the ages will be the ACA and standing up to Trump. Her ambition was to lead the caucus and to deliver; it was never about the power for its own sake. If there was a single guiding force, it was summed up regularly by her – “for the children.” The transition to the next generation of leaders

led by Norman Eisen, on the facts and the law underpinning the investigation, was released earlier this week.

(trending towards Hakeem Jeffries, Katherine Clark and Peter Aguilar) is likely to be seamless.

- The battle for the soul of the Republican party has been joined. Rick Scott launched a bid to oust Mitch McConnell as Senate GOP leader, a post he has held since 2007. McConnell prevailed, 37-10. But, as E.J. Dionne Jr. writing in the Washington Post [reported](#), Scott campaigned on the fact that the Republicans did not stand for anything this year – true. And Scott’s policy pronouncements, such as raising taxes on lower-income Americans and requiring Congress to reauthorize Social Security and Medicare every five years, were a drag on the Senate challengers Scott was trying to elect. As McConnell predicted early on, Scott’s acquiescence to Trump on candidate selection would drive Democratic victories.

Kevin McCarthy will have to scramble for the support of 218 members of the House to be elected Speaker, when the House convenes in January 2023. He survived a challenge from Freedom Caucus member and election denier Rep. Andy Biggs (188-31).

Going forward, Kevin McCarthy, assuming he becomes Speaker, is unlikely to be able to exercise the same degree of control over his caucus as Nancy Pelosi did over hers and generate the volume of legislation that she was able to shepherd through. (That said, Republicans in the minority have shown far less interest in governing than in blocking sensible legislation.) The far-right members will be able to wield significant power in light of the margin, which also means that Trump could well have sway via his MAGA-centric House members.

- *Dobbs* was a principal driver of election results (foreshadowed in August in KS and in NY-19), and for Democrats and Independents reproductive rights became twined with concerns over democracy. It was right to message on the issue, and Democrats became particularly adept at honing the narrative around reproductive “freedom,” including freedom from government interference, thereby breaking the monopoly the GOP seems to have enjoyed over time on owning the spirit of liberty that resonates broadly with Americans. This was particularly helpful in attracting Independents.

Dobbs also had a galvanizing psychological effect, providing Democrats over the summer with a sense of momentum that had proved elusive in the days of surging gas prices at the pump and high costs of food in supermarkets. Voters can sense optimism, which begets success – overnight (and by this, I mean, the date the opinion was formally issued, not the day it was leaked), *Dobbs* injected that optimism into campaigns across the country.

Abortion access, as Tim Alberta [wrote](#) in The Atlantic, is the winning formula that, now weaponized to turn out a new base, will inform field programs, messaging campaigns, micro-targeting efforts and ballot initiatives for cycles to come. For this new base, the focus will not be on justices of the Supreme Court, but rather on state legislators.

- And speaking of messaging, moderate Democrats Elissa Slotkin and Abigail Spanberger, whose races were my personal bellwether, confirmed that Democrats indeed did have a message, and that a critical element of success in R-leaning districts

is a tactic championed by James Carville and American Bridge as well as by Elissa, Abigail and countless others – to “lose better” (that is, to reduce the margins in rural districts to augment far larger margins in urban and suburban districts). Do not give up on the GOP’s “persuadable voters.”⁷ Incidentally, both Elissa and Abigail received endorsements from Liz Cheney.

- Trump had a bad night, and it will likely get worse. “Candidate quality” came back to haunt Republicans, with significant down-ballot implications (the clearest examples being MI and PA). As [Tim Alberta](#) succinctly put it, voters preferred “out of touch” to “out of their minds” and were less worried about “unchecked progressivism” on the left than about “unchecked extremism” on the right (whether in the form of election denial or broader de-legitimization of elections, January 6th or disinformation about the attack on Paul Pelosi, or even Lindsey Graham’s call for a national abortion ban or Rick Scott’s call to “sunset” Medicare and Social Security).
- President Biden’s messaging around “MAGA extremists” made it easier for conservative voters to break from the more extreme Republican candidates. As political analyst Michael Podhorzer noted (as [reported](#) by the New York Times), the Democrats’ best chance was to capitalize on the growing public disdain for far-right Republicans and make it a choice between two very distinct alternatives, rather than a referendum on President Biden. President Biden obliged, often saying “don’t compare me to the Almighty, compare me to the alternative” and calling out MAGA Republicans as forces bent on depriving Americans of fundamental freedoms and rights.

But we should not interpret the outcome of the midterms as signaling that Trumpism will be banished, that MAGA world will simply disappear, any time soon. Recall that the GOP primary process – that is the MAGA base – begot the unimaginably ill-suited (and at times cringe-worthy) candidates; they did not just magically appear. Admittedly, DeSantis has emerged as a key contender on the Republican side, but we should not count Trump out – after all, the GOP has done little to rein him in since 2016 (and it missed a few key opportunities to put an end to his designs on returning to the Oval Office, under law).

- Those in the trenches protecting election integrity were beneficiaries of voters’ concerns about the state of the country. May that continue.

⁷ See [Canary in the Coal Mine](#) in POLITICO. As Elissa’s campaign described her strategy, her field operation made more than 1.8 million attempts to reach voters this cycle, including more than 670,000 calls, more than 85,000 doors knocked and more than 1 million texts sent. A critical element of her victory was over-performance in GOP-leaning counties and rural areas, including winning in Eaton County by nearly 3% (50.5%-47.2%), increasing her 2020 margin in conservative Livingston County by nearly 2%, winning the City of Howell by 13 votes – the first time in recent history that a congressional Democrat carried the city, and winning Brighton by over 8%, increasing our 2020 margin in Brighton by 6%. In Clinton County, which was new to her, she ran over 5% ahead of the 2020 congressional Democrat, winning Dewitt by 17% and Dewitt Township by 12% – flipping towns that congressional Republicans won in 2020.

- Both the conduct of the election and the counting of votes appear to have gone according to plan, with only sporadic incidents of intimidation and no signs of systemic problems. (See [Voting was relatively smooth](#).) Poll watching operations organized by election denial constituencies did not result in feared violence at any scale. There are likely multiple reasons for this, including effective coordination and communication among election administration officials, NGOs, civil society groups and national and, more importantly, state/local law enforcement (aided by comprehensive tracking of online extremist content and election-related disinformation) and content-moderation by the platforms (see [ISD - Election Disinformation](#)).
- Democrats will be able to rely on their majority in the Senate to block what might otherwise head to President Biden's desk from the House, but they will be hard-pressed to push President Biden's agenda further forward. However, control of the Senate forecloses paths for the GOP to affirmatively undermine the existing Biden agenda or successfully remove him or other members of the administration in promised impeachment efforts (stay tuned for endless investigations into the withdrawal from Afghanistan and pandemic policies). That said, the President will need the House to keep the government open and avoid a default on the national debt. The President may try to reach across the aisle to find areas of compromise, but that risks the ire of the progressive wing of the Democratic Party. The President will be able to confirm Supreme Court justices, Federal court judges and others requiring Senate confirmation.

We should savor the midterm outcomes. Conventional wisdom was upended, to the surprise of many, if not most. But it was upended, and significant proportions of voters (that is, of at least the 46.3% of eligible voters who turned out) delivered a message that they care about democracy.

However, Democrats need to give credit where credit is due. As the political psychologist and author of the "Political Brian," Drew Westen, pointed out, while Democrats have much to be thankful for, it is important to thank the Independents and suburban Republicans who, while they may have significant policy differences with Democrats, chose country over party and democracy over authoritarianism. Democrats need this new political center to identify with them and stay the course. Democrats ran the risk of losing this center after the 2018 midterms and again after the 2020 presidential race. But for *Dobbs* and the MAGA-inspired candidates, this coalition may well have drifted back to the right. As Thomas Freidman concluded in his [op-Ed](#) this week, in which he posits that the Big Lie was ever only intended to benefit one man, Trump, the best part of the reckoning over the Big Lie is that it came not from the GOP leadership, "but from the most important and quietly courageous people in this election. It was delivered by everyday Americans ... voting against the Big Lie and its perpetrators in their local voting stations."

With the election of Joe Biden, democracy in America moved off life support in 2021. Republican efforts to diminish what we learned from the January 6th hearings and how close we came to losing the Republic, the pervasive embrace since the 2020 election of the Big Lie and the fielding of significant numbers of election deniers with the avowed purpose of undermining the guardrails that held in 2020 – all suggested that democracy had only moved

as far as intensive care. Post the midterms, we likely are out of the ICU. That move, by the way, comes with a huge price tag ([Open Secrets](#) projects an eye-watering cost of \$16.7 billion for state and federal elections), and that, in and of itself, is terrible for democracy. In the meantime, Trump faces multiple legal threats, and how his base will react to one or more indictments or to a call to action to demonstrate he remains relevant is unknown.

Notwithstanding internecine warfare among competing wings of the GOP, regrettably we can expect consensus in the House perhaps only on what undoubtedly will be high profile efforts to litigate the last two years – performative politics rather than serious governing. This, though, will present a Republican Party eager in many quarters to move beyond Trump with a conundrum if Trump is indicted, forcing them to take sides as to whether or not to investigate the investigators/prosecutors. That is not good for the country; it remains an open question what democracy will look like in 2024.

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ANNEX - SOME ADDITIONAL DATA ON THE ELECTORATE

Demographic Preferences

Bruce Stokes of the German Marshall Fund reported in a briefing, based on exit polling, that a majority of Whites voted Republican (54%), while larger majorities of minorities (90% of Black voters, 69% of Latino voters, 77% of Asian American voters) voted Democratic.

According to [data](#) published by Tuft's Center for Information & Research in Civic Learning and Engagement (CIRCLE):

- youth (18-29) preferred Democrats by a 27-point margin (62% vs. 35%), representing a slight shift in favor of Republicans since 2018, which was 67% vs. 32% (youth are the only age group in which a strong majority supported Democrats);
- voters aged 30-44 are estimated to have split 51% vs. 47%;
- voters aged 45-64 split 44% vs. 54%; and
- voters aged 65 and over split 43% vs. 55%.

Among youth, the race/ethnicity breakdown was estimated as follows:

- Black youth: 87% preferred Democrats vs. 9% who preferred Republicans;
- Latino youth: 67% vs. 30%; and
- White youth: 57% vs. 40%.

According to CIRCLE [data](#), nationally 71% of young women voted for Democrats (and 26% voted for Republicans), while 53% of young men voted for Democrats (and 42% for Republicans).

LGBT youth represented 21% of young voters; 93% voted for Democrats and 5% for Republicans.

In the PA Senate race, where John Fetterman won by a slim 3% margin, youth preferred Fetterman 70% to 28%, compared to 55% to 42% among voters 30-44, with voters over 45 preferring Dr. Oz.

In the WI Governor election, Gov. Tony Evers won re-election by a slim margin, 51% to 48%. Youth gave Evers extraordinary support: 70% vs. 30%. Voters 30-44 also preferred Evers by a slimmer 55% to 44% margin, while voters over 45 backed the GOP candidate.

In the GA Senate race, with a margin of less than 1% separating the candidates, youth backed Sen. Warnock 63% to 36%. Voters aged 30-44 backed Warnock 56% to 41%, while voters over 45 gave a majority of their votes to Herschel Walker. Notably, the youth share of the vote in Georgia was 13%, slightly higher than the national rate.

Youth voting for Democrats, and especially young woman, prioritized abortion as an issue in their voting preferences.

Turnout

Overall turnout (based on preliminary numbers) of 46.3% of eligible voters appears to be below 2018's 50% high-mark, but is on track to exceed turnout in all other midterms since 2002. Turnout in some battleground states is on track to exceed 2018 levels (according to [projections](#) published by the Washington Post, PA turnout (55.7%) looks to have exceeded

2018 by 4 points; MI turnout (58.7%) looks to have exceeded 2018 levels by 2 points). Nearly six in 10 eligible voters voted in WI. Turnout in MD and NJ is projected to be more than 10 points lower than in 2018.

According to [CIRCLE data](#), turnout among youth (18-29) is expected to be the second highest in almost three decades, at 27% (behind the 31% turnout in 2018), and that turnout in some battleground states was even higher (an overall aggregate of 31% for the eight states). About one in eight voters (12%) were under 30, nearly matching the shares in 2014 and 2018.

According to [Pew Research Center](#), an estimated 34.5 million Latinos were eligible to vote this year, making them the fastest-growing racial and ethnic group in the U.S. electorate since the last midterm elections. The number of Latino-eligible voters has increased by 4.7 million since 2018, representing 62% of the total growth in U.S. eligible voters during this time. Five key themes noted in the Pew Research Center report are:

- Latinos were projected to account for 14.3% of voters in the midterms, a new high.
- Approximately 8.3 million out of the 32.3 million Latino-eligible voters (26%) reside in CA in 2020. TX had the second-largest number (6.2 million), followed by FL (3.4 million), NY (2.1 million) and AZ (1.3 million). Together, these five states hold about two-thirds (66%) of all Latino-eligible voters.
- NM is also the only state in which Latinos make up a higher share of the total eligible voter population than any other racial or ethnic group.
- Latinos are considerably less likely than Americans overall to be eligible to vote (53% vs. 72%). This is partly because the Latino population includes a large number of people who are too young to vote or who are not U.S. citizens.

[Pew Research Center](#) found that while Black voters as a bloc have grown more modestly, their turnout rates were higher (51%) in 2018 than among Latino or Asian American voters (40% each). Black voters in Georgia account for nearly one-third of eligible voters. In an August 2022 [Pew Research Center](#) survey, 70% of Black registered voters said they would vote for or were leaning to the Democratic House candidate. Another 24% were either unsure or said they would back another candidate. Just 6% of Black registered voters said they would back the Republican House candidate. Four key themes noted in the Pew Research Center report are:

- Blacks were projected to account for 13.6% of all eligible voters.
- As of 2020, eight states are home to about half of all Black eligible voters in the United States. TX has the largest number, with 2.7 million, followed by GA and FL (each 2.5 million). Rounding out the top eight are NY (2.3 million), CA (2.0 million), NC (1.8 million), and MD and IL (1.4 million each). Together, these states account for 52% of Black eligible voters in the 50 states and D.C.
- Seven-in-ten Blacks are eligible to vote, compared with 72% of all people living in the country. Two reasons explain this consistently high eligibility: a large share of the Black population is 18 or older (73%) and an even larger share are citizens (96%), if not native-born citizens (90%).
- Black eligible voters are about as likely as eligible voters overall to be women (53% vs. 51%). Black eligible voters are more likely to be women than they are to be men (53% vs. 47%).

[Pew Research Center](#) reports that Asian Americans have been the fastest-growing group of eligible voters over roughly the past 20 years, but their growth has leveled off somewhat since 2018. Asian Americans typically lean Democratic. In the August [2022 Pew Research Center](#) survey, 57% of English-speaking, Asian registered voters said they would likely back the Democrat in the House race, while 26% said they would likely support the Republican. In midterm elections, voter turnout rates among Asian American eligible voters has typically trailed those of some other groups, while keeping up with the rate of Latino voter turnout. Four key themes noted in the Pew Research Center report are:

- A projected 13.3 million Asian Americans were eligible to vote, making up 5.5% of all eligible voters.
- As of 2020, the majority of Asian American eligible voters (56%) live in only five states. CA has the highest number of Asian American eligible voters by far (4.2 million). The state is home to nearly a third (32%) of the entire U.S. Asian electorate. The state with the second-most Asian American eligible voters is NY (1.1 million), followed by TX (930,000), HA (565,000) and NJ (505,000).
- Asian Americans are the only major racial or ethnic group where the majority of eligible voters are naturalized citizens. A smaller share of Asian American eligible voters (43%) are U.S.-born citizens.
- Asian Americans are slightly younger than eligible voters overall. The median age for Asian American eligible voters is 44, compared with 48 among the broader population of eligible voters. And 36% of Asian American eligible voters are ages 30 to 49, compared with 32% of the total eligible voter population.