



Key Factors That Shaped 2018... And A Brief Look Ahead

November 2018

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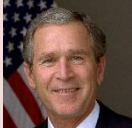

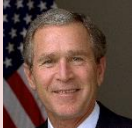


PUBLIC OPINION STRATEGIES

**Yes, *it was* all
about Trump.**



A midterm record said their vote was a message of support or opposition to President Trump.

Midterm Elections: Sending a Message

	Trump 2018	68%
	Obama 2010	63%
	Bush 2006	55%
	Obama 2014	49%
	Bush 2002	45%
	Clinton 1994	38%
	Clinton 1998	37%

Source: Public Opinion Strategies Post-Election Surveys.

A high percentage of voters were either sending a message to support or oppose President Trump.

Midterm Elections: Sending a Message

President/Year	Supporting President	Opposing President	Net Difference
Obama 2010	23%	40%	-17%
Bush 2006	19%	36%	-17%
Obama 2014	17%	32%	-15%
Trump 2018	31%	37%	-6%
Clinton 1994	17%	21%	-4%
Clinton 1998	20%	17%	+3%
Bush 2002	29%	16%	+13%

Source: Public Opinion Strategies Post-Election Surveys.

This was a fairly traditional midterm: Presidents with a job approval rating below 49% lose an average of 39 seats. This is coincidentally the number of seats Republicans have currently lost in 2018.



Trump's Job Approval

44%*

First time in history that four successive presidents have lost control of Congress.

Job Approval

Average Change

Over 60%

+1 Seat

49%-59%

-21 Seats

Under 49%

-39 Seats

**RCP Average on Election Day – November 6, 2018.*

Source: Gallup using final Presidential Approval and mid-term election results from 1962-2014.



**Intensity and
turnout – at a
historic level.**

Interest in this election was almost at a presidential level.

Interest in the Election

Midterm Years	
Date	Percent 9-10
November 2018	70%
Mid-October 2018	65%
Mid-October 2014	50%
Mid-October 2010	61%
Mid-October 2006	61%

Presidential Years	
Date	Percent 9-10
Mid-October 2016	72%
Mid-October 2012	77%
Mid-October 2008	87%
Mid-October 2004	82%

Record early voting has so far meant one thing: *not* cannibalizing election day voters, but instead record turnout.

Percent Who Voted Early

Midterm Years	
2018	42%
2014	34%
2010	27%
2006	23%
2002	20%

Presidential Years	
2016	40%
2012	36%
2008	31%
2004	24%
2000	16%

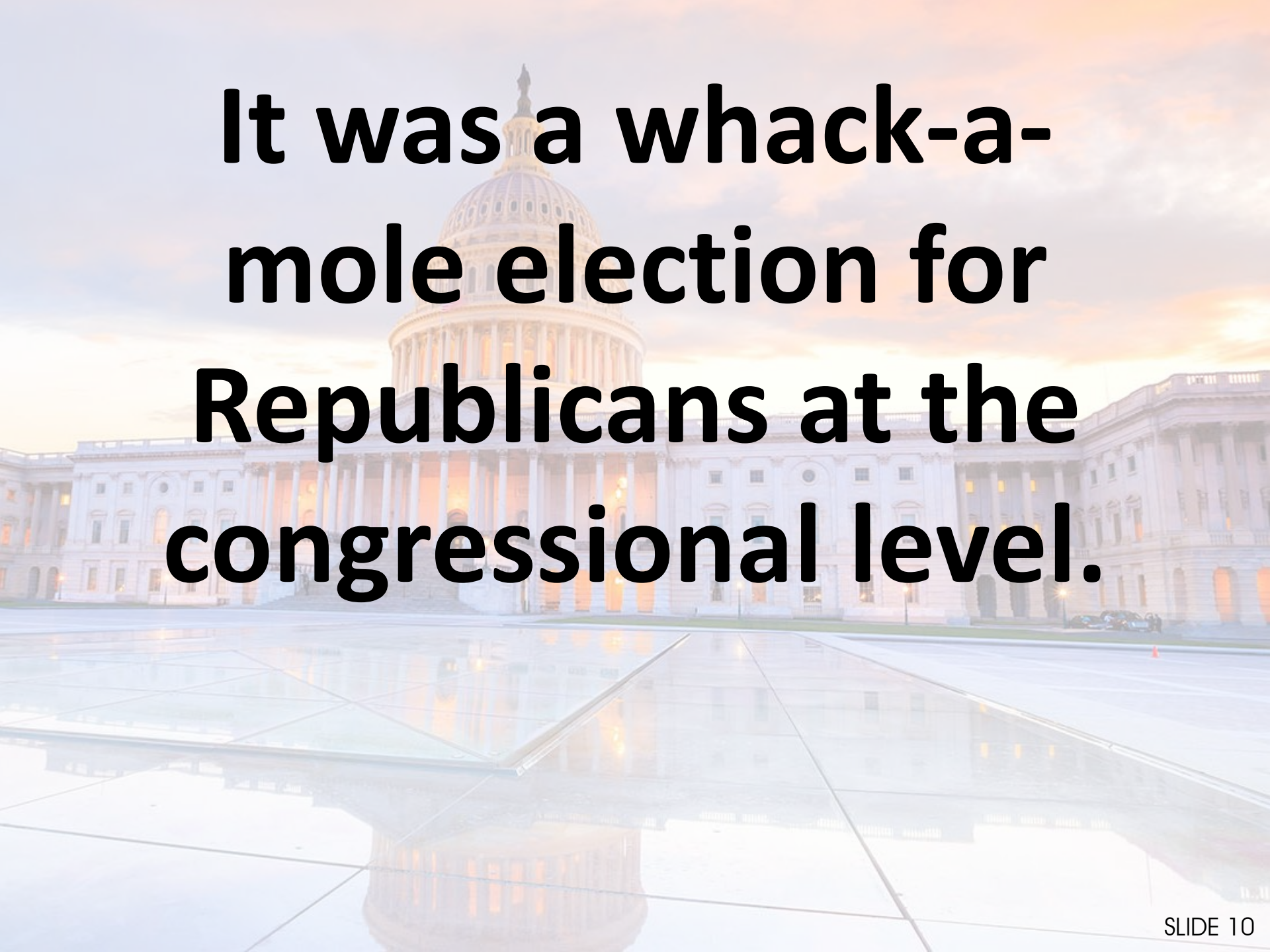
Source: Public Opinion Strategies Post-Election Surveys.

Election turnout is estimated to be the highest percentage of eligible voters since **1914!**

U.S. Voter Turnout as % of Eligible Voters

Date	U.S. Voter Turnout
2018	49.2%
2014	36.7%
2010	41.0%
Average 1970s-2000s	40.3%
1966	48.7
1914	50.1

Source: [US Election Project](#), 11/15 update with an estimated voter projection of 115,897,500 ballots.



It was a whack-a-mole election for Republicans at the congressional level.

There were too many Republican open congressional seats and too many seats in play to keep a majority.

Year	GOP Lean or Toss Up Seats	DEM Lean or Toss Up Seats	President's Party Seats Lost
September 2018	70	4	-39*
November 2014	12	27	-13
November 2010	7	93	-63
November 2006	55	7	-30

Source: Cook Political Report. *Source: [Axios](#), as of November 19, 2018.



**The “green wave” was
an accelerant for the
Democrats and is
reshaping our politics.**

Record Spending in a Midterm Election

	Republicans	Democrats	Net Difference
Candidates Raised	\$612M	\$923M	+311M
Parties Raised	\$147M	\$250M	+103M

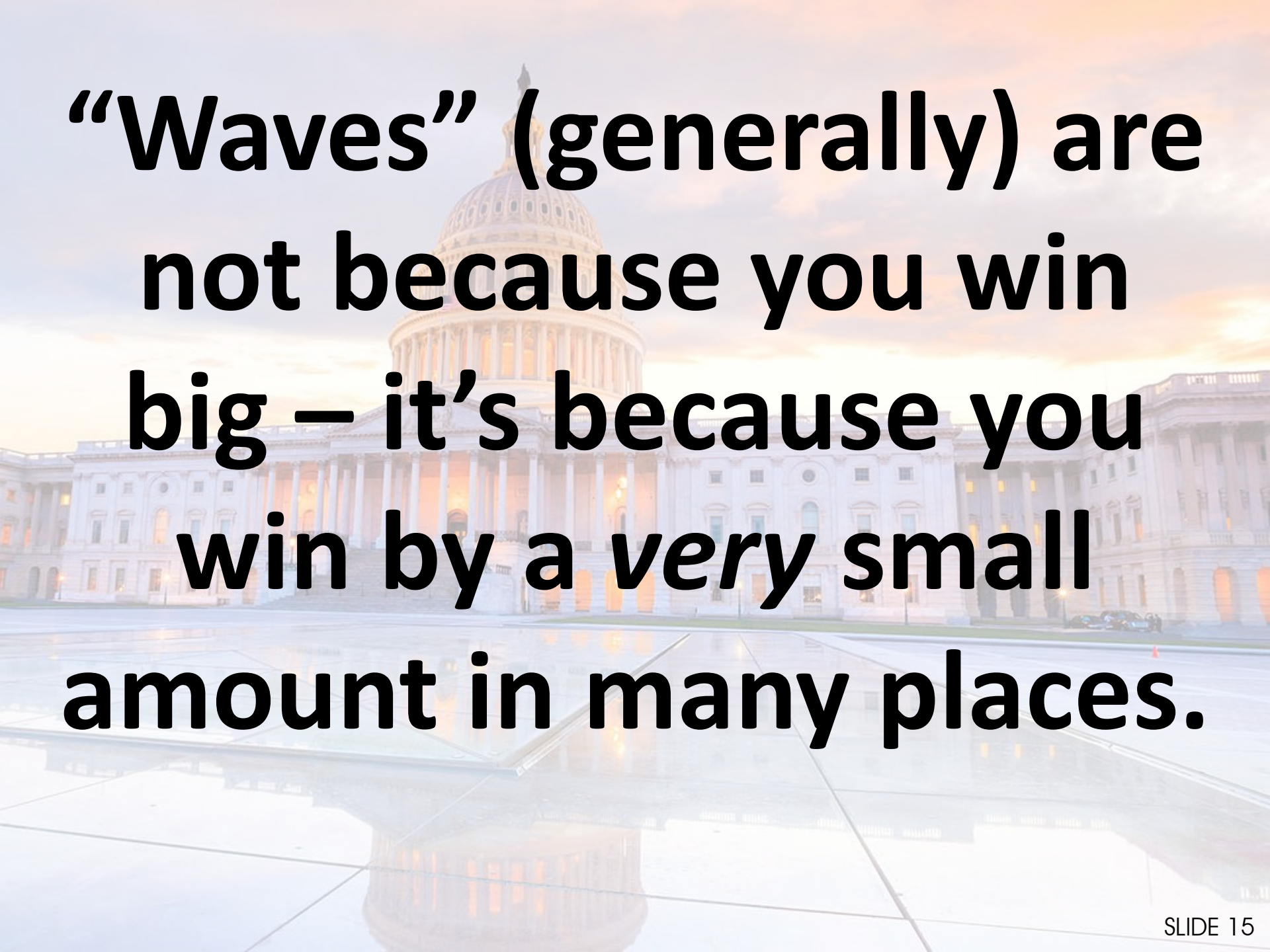
Total Spending by Outside Groups	
2018	\$1.17B*
2014	\$566.1M

Source: Open Secrets (money), as of November 8, 2018. [OpenSecrets](#) (FEC) excluding Party Committee independent units. *Red = projected number.

In the third quarter, 51 incumbent House Republicans were outraised at least 2-to-1, while 71 were outspent by their challenger.

Only five Democratic House incumbents were outraised.

Source: Politico; October 17, 2018.



**“Waves” (generally) are
not because you win
big – it’s because you
win by a *very* small
amount in many places.**

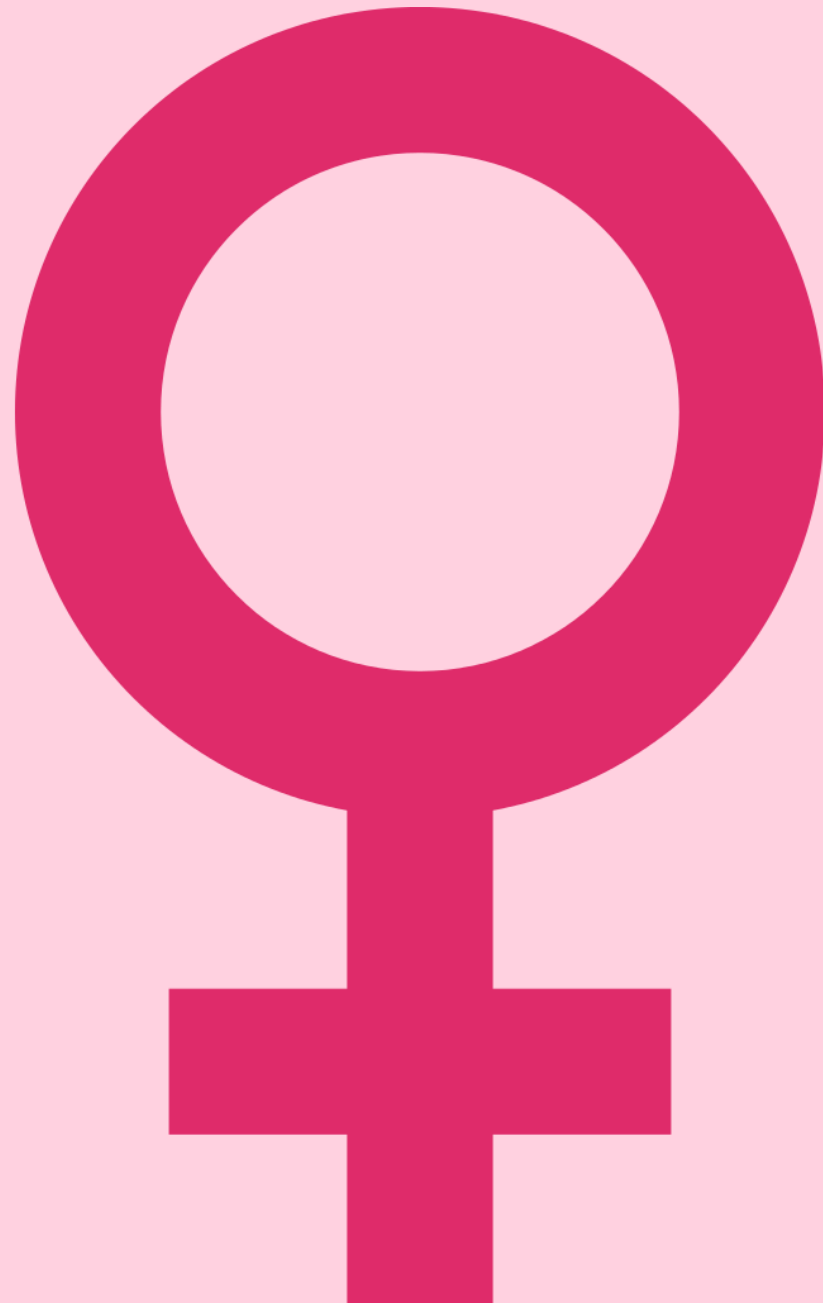
Republicans lost 39 House seats while only losing the actual vote in swing seats by one percentage point.

2018 Midterm Election Popular Vote:*

	Republican Votes	Democrat Votes	Net Difference
Total U.S. Vote	45%	53%	+8%
Cook Political Report Swing Districts (18%)	49%	50%	+1%

*Vote as of November 19, 2018.

Note: Percentages are rounded to the nearest whole number.




There was an all-time record 234 women running for Congress, 182 Democratic women and 52 Republican women.

**There will be 90 new Members in the House of Representatives;
35 of them are Democratic women.
There is only one new Republican female House Member.**

Source: Roll Call. Note: 4 House races have not been called as of November 19, 2018.

If Republican incumbent Mia Love wins in UT-4, the party will have 14 female House Members next year versus 90 so far for the Democrats.

Source: NBC News; November 20, 2018.

The background of the slide is a photograph of the United States Capitol building in Washington, D.C., taken during the "golden hour" of sunset. The building's white marble facade is illuminated by the warm, low light of the setting sun, creating a soft glow. The iconic dome is visible in the center, and the surrounding architecture with its columns and arches is clearly defined. The sky is a mix of pale blue and orange, with some light clouds. The foreground shows a paved plaza with a grid pattern, and the overall scene is peaceful and majestic.

Gender: a new all-time record split between men and women in voting for Congress; a net 23 point difference.

Women voted Democrat for Congress by a record margin and by a record gap compared to men.

Exit Poll Congressional Preference by Key Sub-Groups

	2006 Margins	2008 Margins	2014 Margins	2016 Margins	2018 Margins
Men	+3%	+6%	+16%	+12%	+4%
Women	+12%	+14%	+4%	+10%	+19%

This is a net 23 point difference by gender.

Source: CNN U.S. House National Exit Polls.

Republicans only broke even among white women.

Exit Poll Congressional Preference by Key Sub-Groups

	2006 Margins	2008 Margins	2014 Margins	2016 Margins	2018 Margins
White Men	+9%	+11%	+31%	+32%	+21%
White Women	+1%	+6%	+14%	+12%	-0-

Source: CNN U.S. House National Exit Polls.



**White college educated
women have moved
decisively towards the
Democratic party.**

Exit Polls by White Women/Education

Year	Republican	Democrat	Net Difference
<i>White Women College+</i>			
2018	39%	59%	+20%
2016	49%	49%	-0-
<i>White Women Less Than College</i>			
2018	56%	42%	+14%
2016	63%	35%	+28%

**Education is the new
cultural divide.**



2016 Presidential: Education was the Cultural Divide

States Where More Voters Have Advanced Degrees Go DEM, Fewer GOP

State	% Advanced degree	Rank
District of Columbia	28.00%	
Massachusetts	16.40%	1
Maryland	16.00%	2
Connecticut	15.50%	3
Virginia	14.10%	4
New York	14.00%	5
Vermont	13.30%	6
New Jersey	12.90%	7
Colorado	12.70%	8
Illinois	11.70%	9
Rhode Island	11.70%	10
Delaware	11.40%	11
New Hampshire	11.20%	12
Washington	11.10%	13
California	10.70%	14
Oregon	10.40%	15
New Mexico	10.40%	16
Minnesota	10.30%	17
United States Average	10.30%	--
Kansas	10.20%	18
Pennsylvania	10.20%	19
Hawaii	9.90%	21
Georgia	9.90%	21
Maine	9.60%	23
Missouri	9.50%	24
Michigan	9.40%	25

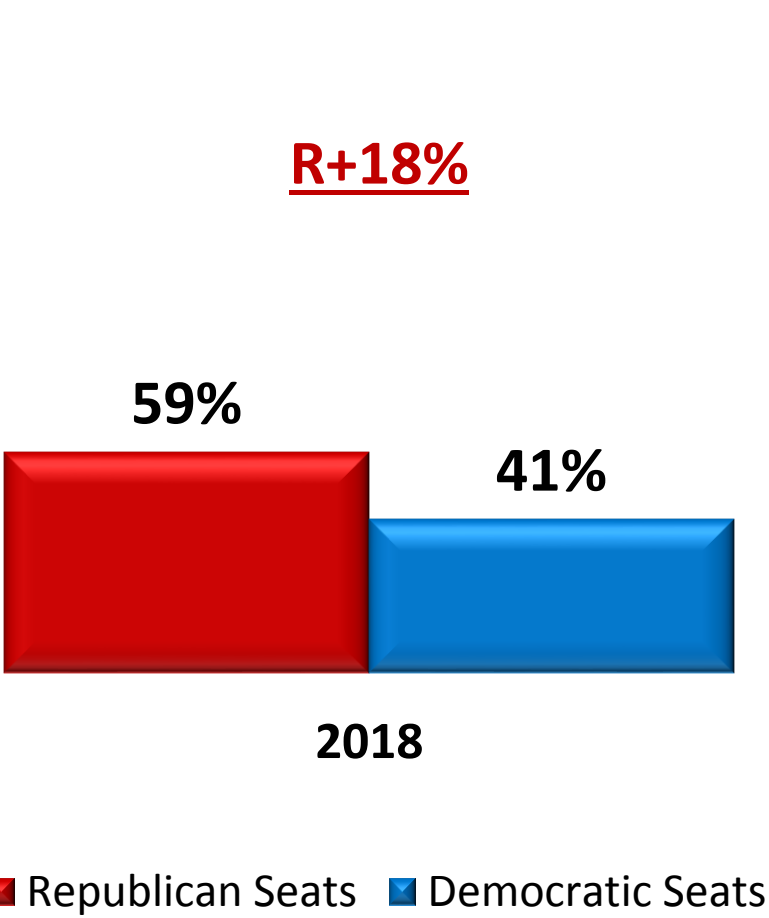
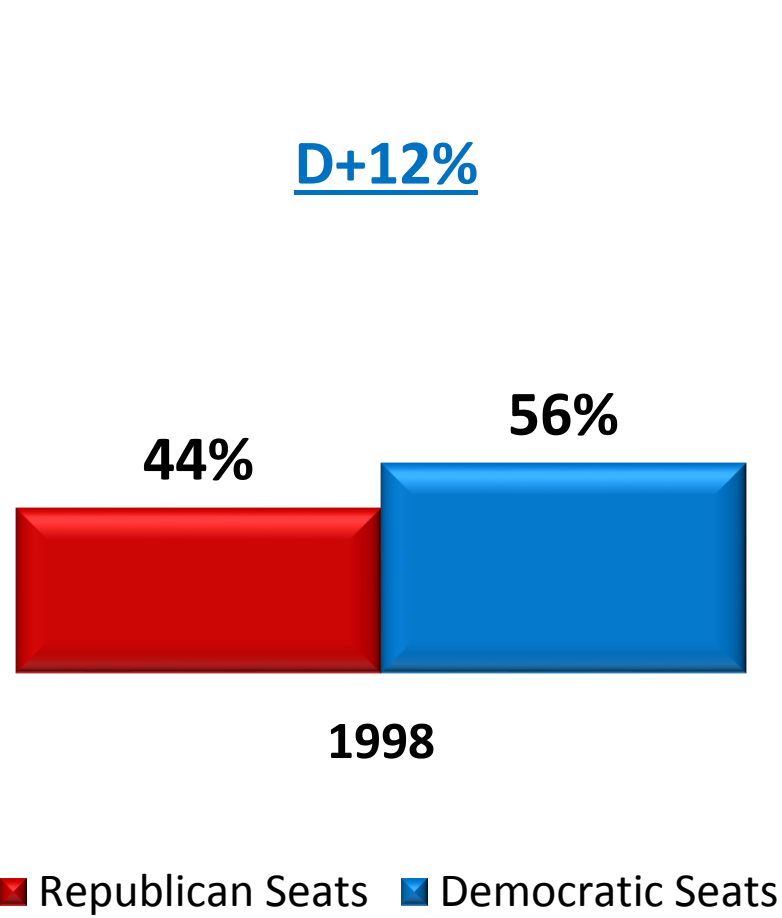
State	% Advanced degree	Rank
Arizona	9.30%	26
Utah	9.10%	27
Alaska	9.00%	28
Florida	9.00%	28
Nebraska	8.80%	30
North Carolina	8.80%	31
Ohio	8.80%	32
Texas	8.50%	33
Kentucky	8.50%	33
Wisconsin	8.40%	35
South Carolina	8.40%	35
Montana	8.30%	37
Indiana	8.10%	38
Wyoming	7.90%	39
Tennessee	7.90%	39
Alabama	7.70%	40
Nevada	7.60%	41
Idaho	7.50%	42
Iowa	7.40%	43
Oklahoma	7.40%	43
South Dakota	7.30%	45
Mississippi	7.10%	46
Louisiana	6.90%	47
North Dakota	6.70%	48
West Virginia	6.70%	48
Arkansas	6.10%	50

Republicans lost all white college voters by eight points.

Exit Polls by White/Education

Year	Republican	Democrat	Net Difference
<i>Whites College+</i>			
2018	45%	53%	+8%
2016	54%	44%	+10%
2014	57%	41%	+16%
2010	58%	39%	+19%
<i>Whites Less Than College</i>			
2018	61%	37%	+24%
2016	66%	31%	+35%
2014	64%	34%	+30%
2010	63%	33%	+30%

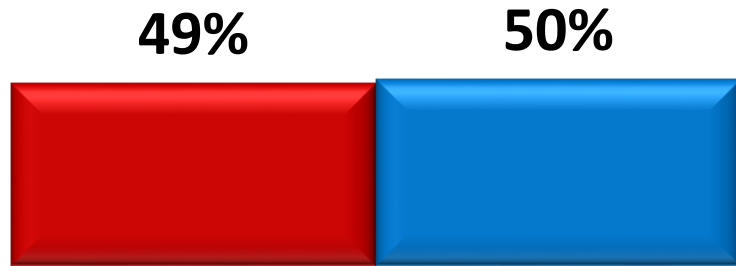
Parties' Share of House Seats Won by Lowest Quartile Educational Attainment – 1998 vs. 2018



Note: reflects results as of 4pm on November 7. Source: [WSJ](#)

Parties' Share of House Seats Won by Highest Quartile Educational Attainment – 1998 vs. 2018

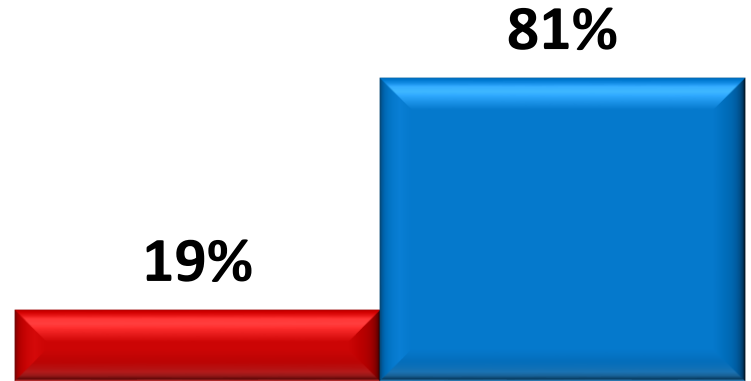
D+1%



1998

■ Republican Seats ■ Democratic Seats

D+62%



2018

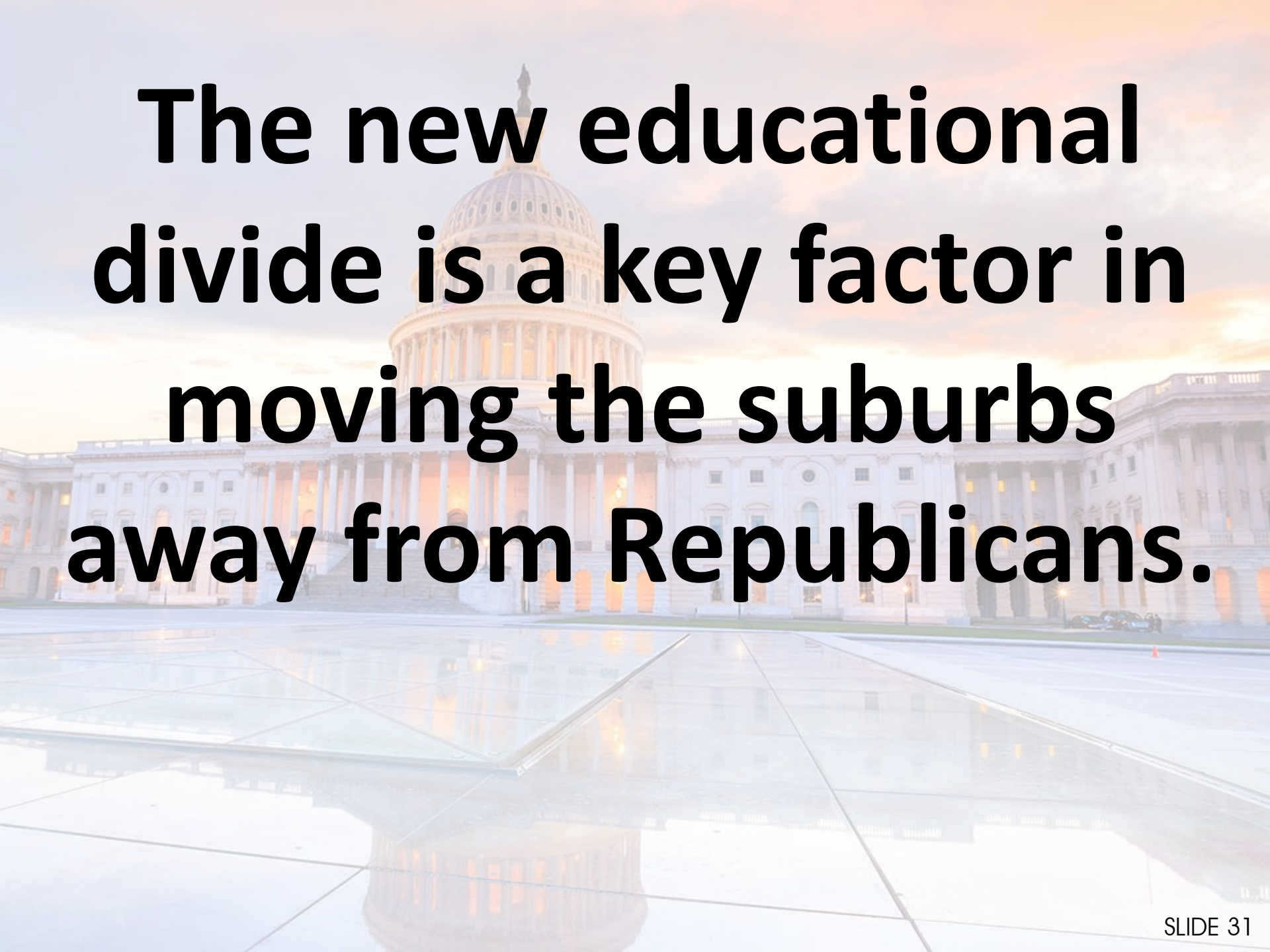
■ Republican Seats ■ Democratic Seats

Note: reflects results as of 4pm on November 7. Source: [WSJ](#)

The composition of the Republican party has shifted significantly over the decade to non-college whites.

Self-Described Republicans by Ethnicity/Education

	2010 Merge	2012 Merge	2014 Merge	2016 Merge	2018 Merge
Total Republican Non-College Whites	50%	48%	49%	56%	59%
Total Republican College+ Whites	40%	40%	38%	33%	29%
Republican Non-Whites	10%	12%	13%	11%	12%



The new educational divide is a key factor in moving the suburbs away from Republicans.

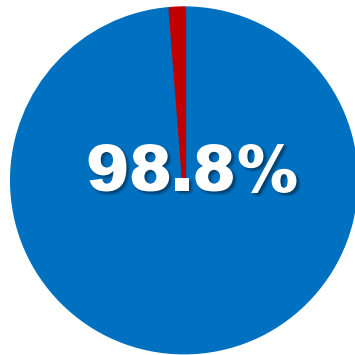
Exit Polls of Suburban Voters

Year	Republican	Democrat	Net Difference
2018	49%	49%	-0-
2016	53%	45%	+8%
2014	55%	43%	+12%
2012	51%	47%	+4%
2010	55%	42%	+13%

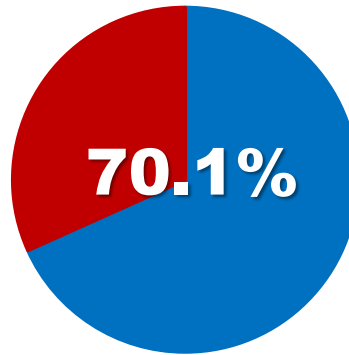
Democrats Dominate Urban and Now Suburban Districts

Democrats' Winning Percentage by House District Type

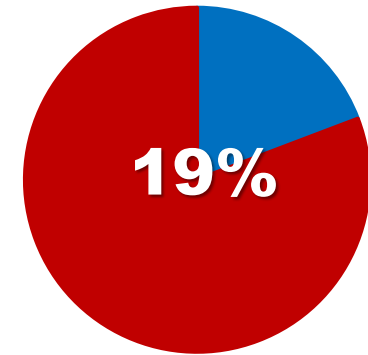
URBAN



SUBURBAN



RURAL



GOP Has So Far Lost 21 / 25 Districts Won by Hillary Clinton in 2016

~~AZ-2~~ ~~CA-10~~ ~~CA-21~~ ~~CA-25~~ ~~CA-39~~ ~~CA-45~~ ~~CA-48~~ ~~CA-49~~ ~~CO-6~~
~~FL-26~~ ~~FL-27~~ ~~IL-6~~ ~~KS-3~~ ~~MN-3~~ ~~NJ-7~~ ~~NY-24~~ ~~PA-1~~ ~~PA-5~~
~~PA-6~~ ~~PA-7~~ ~~TX-7~~ ~~TX-23~~ ~~TX-32~~ ~~VA-10~~ ~~WA-8~~

Source: David Montgomery, [City Lab](#), races called as of November 19, 2018.





The Issue Agenda

A plurality of Democratic TV advertising was on the topic of health care.

*Percentage of House/Senate Campaign Advertisements Mentioning...
January – September 30, 2018*

Ranked by Democrat Campaign Mentions

		
Health care	36%	12%
Jobs-Unemployment	10%	10%
Taxes	9%	18%
Health care: Medicare	9%	3%
Budget/Government Spending	8%	10%
Social Issues	8%	8%
Corruption	8%	7%
Energy/Environment	7%	3%
Immigration	3%	14%
Pro-Trump	2%	14%

On an open-ended question, health care went from barely on the table during the last midterm to the most important issue of 2018.

2014	
23%	Economy/Jobs
10%	Education
9%	Government Dysfunction/Getting Country Moving on Right Track
8%	Immigration/Illegal Immigration
6%	President Obama's Health Care Reform Law—Negative
6%	Foreign Policy/National Defense
5%	Taxes
4%	Cutting Government Waste/ Controlling Government Spending
4%	President Obama's Health Care Reform Law—Positive
4%	Moral Values

2018	
23%	Health Care
18%	Economy/Jobs
15%	Immigration/Illegal Immigration
10%	Taxes
9%	Education
7%	Moral Values
5%	Environment
4%	Need More Gun Control
4%	Pro-Life/Abortion
3%	Need More Protection for Gun Rights

Source: Public Opinion Strategies Post-Election Surveys.

When given eight issues to choose from, health care rises to the top as the deciding vote factor for Congress.

Ranked by First Choice

	First Choice	Combined Choice
Health care	24%	37%
The economy and jobs	17%	28%
Changing how things work in Washington	17%	30%
Immigration	14%	33%
Abortion	5%	12%
Taxes	5%	13%
Guns	4%	16%
Foreign policy and terrorism	3%	11%

Source: Public Opinion Strategies Post-Election Survey.

Democrats dominated health care voters, Republicans won immigration, the economy/jobs, and taxes.

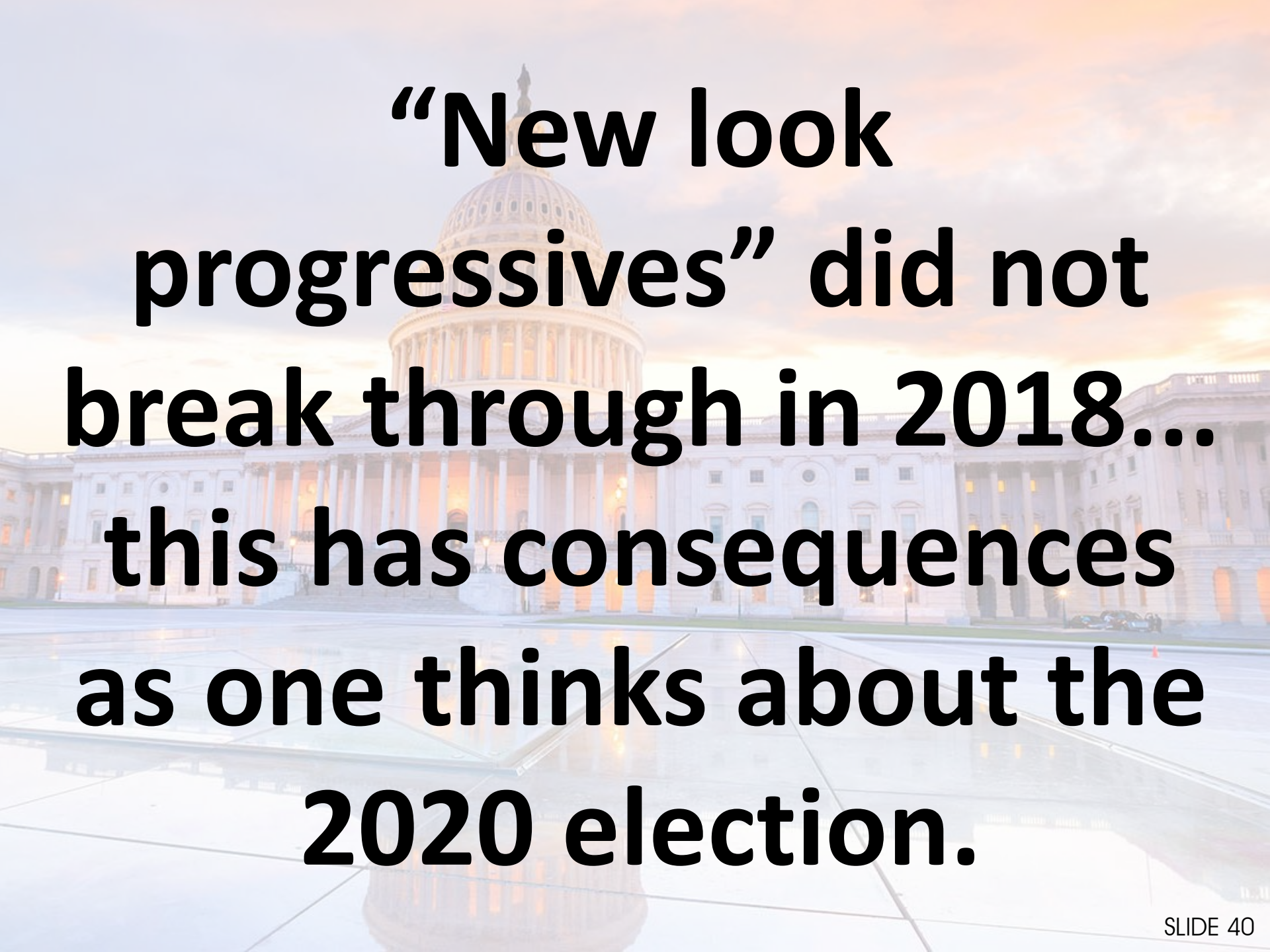
Congressional Ballot – by Most Important Issue

	Republican	Democratic	Net Diff.
Overall	46%	53%	D+7%
Health Care (36%)	17%	83%	D+66%
Immigration (32%)	64%	36%	R+28%
Changing DC (29%)	36%	62%	D+26%
Economy/Jobs (27%)	68%	31%	R+37%
Guns (15%)	38%	61%	D+23%
Taxes (13%)	58%	41%	R+17%
Abortion (11%)	53%	47%	R+6%
Foreign Policy (10%)	44%	52%	D+8%

Source: Public Opinion Strategies Post-Election Survey.



A Look Ahead to 2020



**“New look
progressives” did not
break through in 2018...
this has consequences
as one thinks about the
2020 election.**

2018 Key Races Featuring Democratic Progressives

Republican Candidate

State

Democratic Candidate



Florida
(R+0.4)*



LOST



Georgia
(R+1.4)*



LOST



Arizona
(R+14.2)*



LOST



Texas
(R+2.6)*



LOST

**As of November 19, 2018.*

The Industrial Midwest is Up For Grabs

As Goes the Rust Belt? The Road to 2020 Runs Through...

BOTH PARTIES LIKELY TO PUSH POLICIES POPULAR IN THESE STATES					
	IA	MI	OH	PA	WI
GOV. 2016	GOP	GOP	GOP	DEM	GOP
GOV. 2018	GOP	DEM	GOP	DEM	DEM
SENATE 2019-20	2 R	2 D	1D / 1R	1D / 1R	1D / 1R
WH 2012	DEM	DEM	DEM	DEM	DEM
WH 2016	GOP	GOP	GOP	GOP	GOP

Questions?





PUBLIC OPINION **STRATEGIES**

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