

NationalJournalMembership

Charlie Cook's Perspective on the 2016 Election

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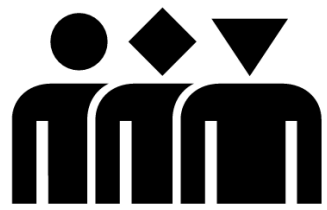
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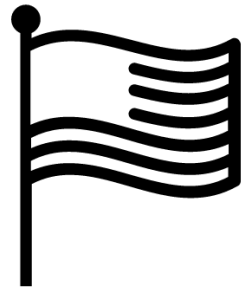
Afzal Bari

Six Dynamics Affecting 2016 Race

Increasingly Polarizing Ideologies



Culture Wars



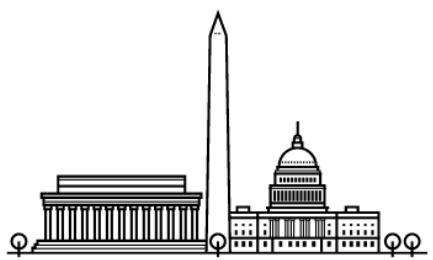
Economic Anxiety



Strong Sense of Populism



Anger at Washington and Career Politicians



America's Place in the World



Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015
Clipart from Noun Project: Luis Prado; Guilherme Simoes; Cristiano Zoucas; Leighton Pustejovsky; Laura Lin; Stephen Copinger

Democrats and Republicans are More Ideological than Ever

Increasingly Radical Party Ideologies Trap Clinton and Bush in an Ideological Time Warp



Democrats **much more liberal** compared to when Bill Clinton left office 15 years ago



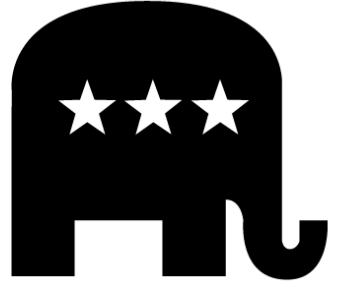
Hillary Clinton was considered to be far left in her husband's time; now she is scrambling to keep up with a party that has moved well to her left

She has changed her positions on **trade** and **Keystone XL** to align with her party



Jeb Bush was one of the most conservative governors in his time; now he is on the left in his party though his ideologies have not changed

Unlike Clinton, Bush has been **unwilling to change** his positions on issues such as immigration and education




GOP **much more conservative** compared to when George W. Bush left office 7 years ago

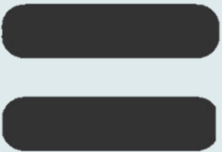
Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015
Clipart from Noun Project: Lorie Shaull; Benjamin Harlow; Yi Chen

Culture War Goes Beyond Deep-Seated Policy Conflicts

How American Values are Weighted By Different Groups of People



JUSTICE



EQUALITY

There are **certain values that all Americans share**, but there is a fundamental difference between the two sides of the ideological spectrum

Liberals place a premium on **justice and equality**

Care most about:
Economy, jobs, wealth inequality, healthcare, etc.

Conservatives value **freedom and liberty** above all

Care most about:
Terrorism, national security, America's place in the world



FREEDOM



LIBERTY

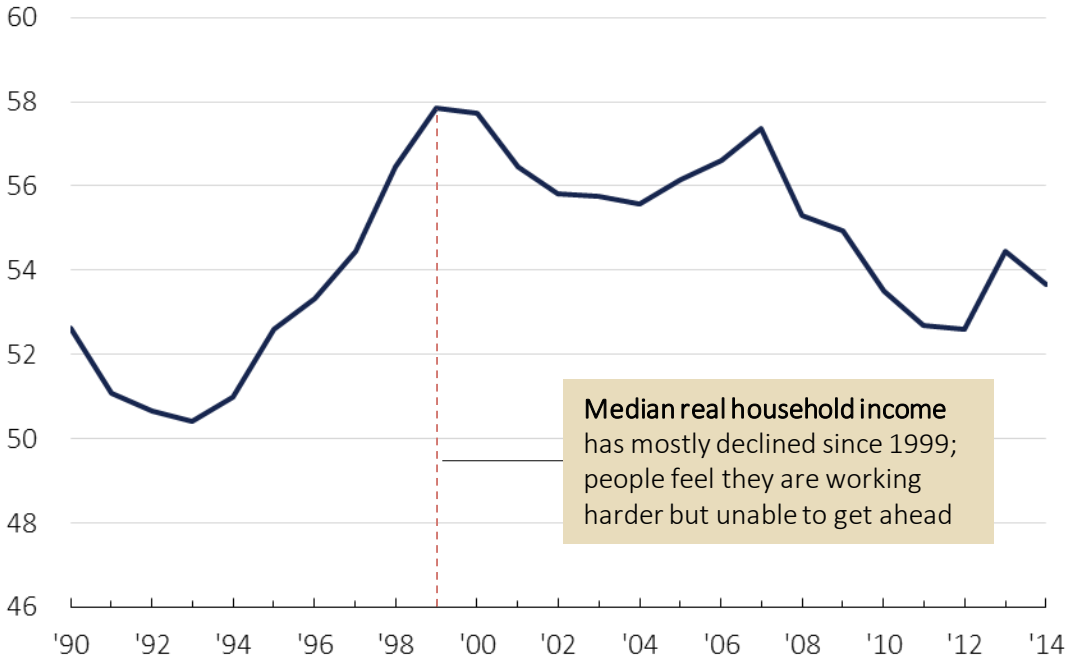
- Analysis**
- There are **deep-seated conflicts** over abortion, gay marriage, and the role of religion in public life
 - These aren't only **policy disagreements**, but a result of groups of people seeing the world in very different ways
 - There is a **city-rural split**
 - One side of the country believes values are **dynamic**, changing over time and with society. The other side believes values must be held onto and **defended**
 - People of faith see their religion and values in jeopardy

Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmers, December 15, 2015
Clipart from Noun Project: Erin Gillaspay; Ivan Kvasov; John Melven; Lloyd Humphreys

A Slow Recovery Has Led to Economic Anxiety

Median Real Household Annual Income

Thousands of 2014 dollars, not seasonally adjusted



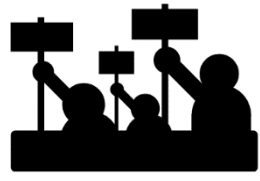
“Tortoise” Recovery

- A fragile economy has been buffeted by the Greece crisis, China slowdown, West Coast dock strike and drought
- High-income individuals, corporations and banks have recovered from recession, but the average person is still suffering
- For the first time in history, a majority of Americans do not believe their children will have the same opportunities that they had

Sources: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015; Chief Economist, Goldman Sachs; Federal Reserve Bank of St. Louis, "Real Median Household Income in the United States;" Noun Project: Johan H.W. Basberg

Rise in Populism Leads to Anger and Distrust of Institutions Among Liberals and Conservatives

Increased Popularity of Populism on the Left and Right



OCCUPY WALL STREET



TEA PARTY MOVEMENT



BERNIE SANDERS

People on both sides of the ideological spectrum feel **distrust** and **anger** at large institutions.

There is the sense that "everyone has a lobbyist except me."



ELIZABETH WARREN

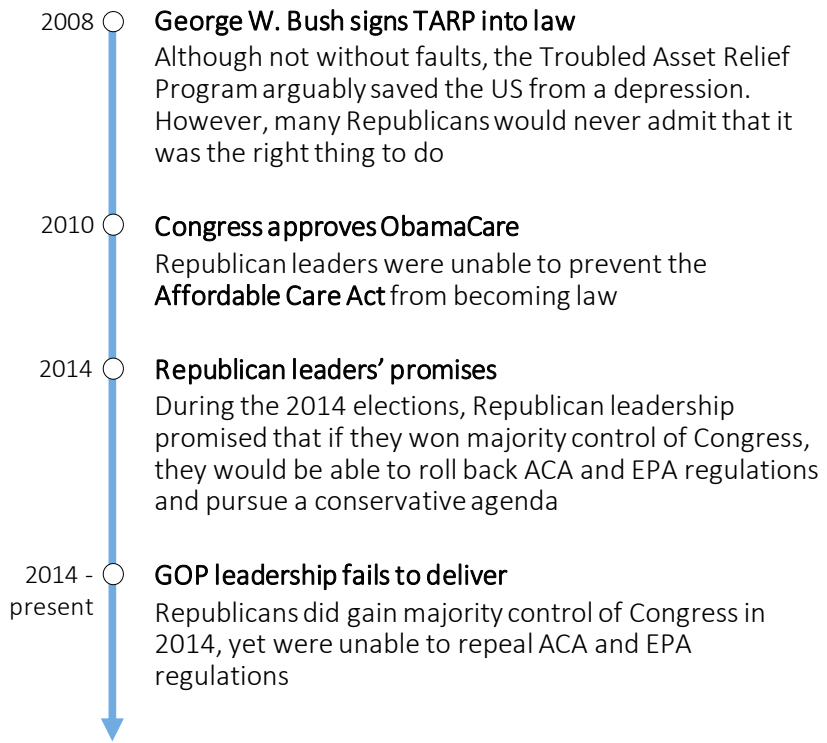


DONALD TRUMP

Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015
Clipart from Noun Project: Tyler Nations, Achille Bianchi, Lorie Shaull, Marie Van den Broek; Ed Harrison; Nick Bluth

Trust in Government is at Historic Lows, Especially Among Republicans and Conservatives

A Series of Blows to the GOP



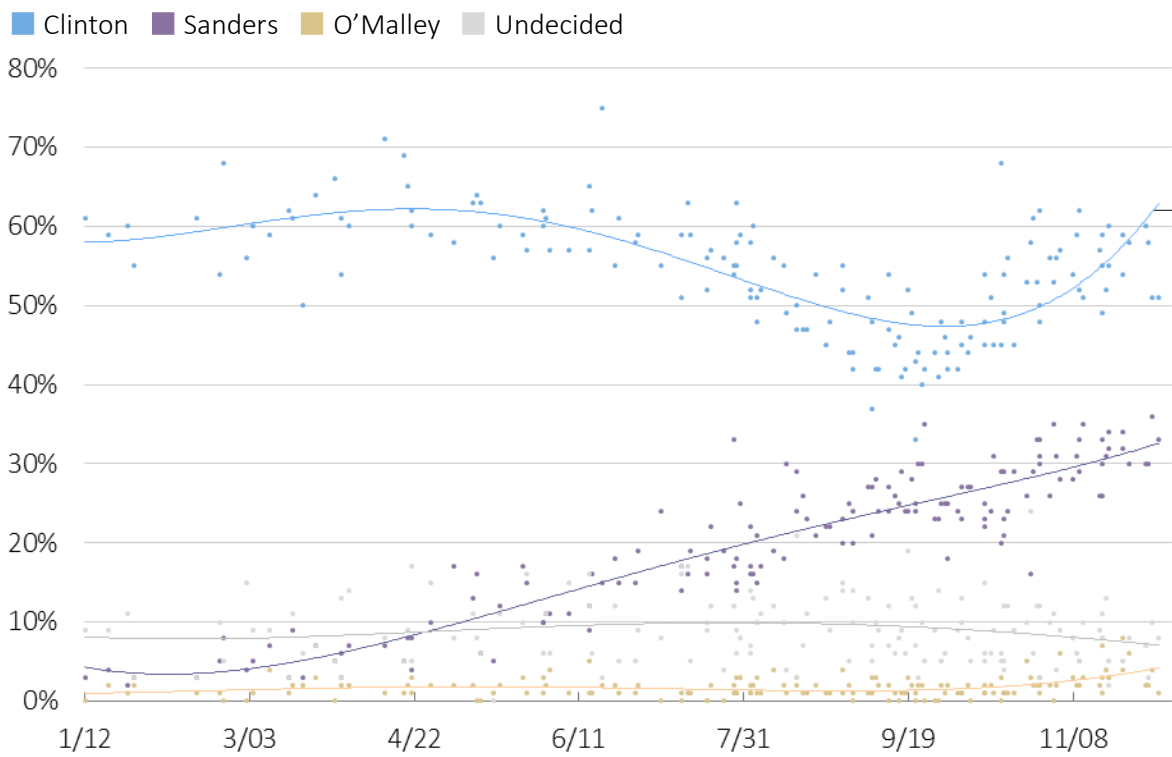
The Simple Truth
Even if a party has majority control of Congress, it is not really in charge unless it holds the Presidency or has veto- and filibuster-proof majorities in the House and Senate.

Nevertheless, Republicans feel betrayed by their leadership and have the mindset that Speaker Boehner and Mitch McConnell "chose" not to fulfill their promises.

Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015

Hillary Clinton's Biggest Problem is Still Her E-mail Scandal, Not Bernie Sanders

January 2015-December 2015 Polling Numbers, by Democratic Candidates

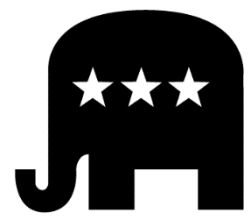
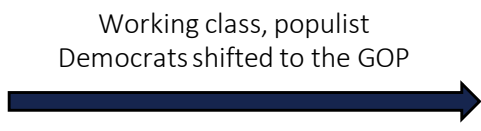


- Clinton is the clear frontrunner in the Democratic primary; her polling numbers are still strong among Democrats and liberals
- Her numbers were strong among moderates and independents until her e-mail scandal
- As long as the Public Integrity section of the Justice Department does not pursue a prosecution, the nomination is hers
- Even if Clinton is prosecuted, Democrats will turn to **Joe Biden**
- Despite his recent momentum, **Bernie Sanders** will not win the nomination

Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015; HuffPost Pollster, "Poll Chart: 2016 National Democratic Primary," December 7, 2015.

A Blue Collar Movement in Party Affiliation Has Led to Today's Divided Republican Party

Shift in Party Make-Up Over Last Few Decades



Today's GOP
Split roughly in half by college graduates and non-college graduates

Two Brackets of Republicans in 2016

Mainstream, Establishment Republicans

- Party started moving away from the establishment wing in 2011, with the rise of Michele Bachmann, Rick Perry, Herman Cain, Rick Santorum and Newt Gingrich
- It wasn't until these candidates failed that GOP settled for **Mitt Romney** as its 2012 nominee

2016 Candidates:
Jeb Bush, Chris Christie, Scott Walker, John Kasich, Marco Rubio

Unconventional, Angry & Alienated Republicans

- An **amalgam of four groups**: (1) Tea Party, (2) Faith-based, evangelical conservatives, (3) Libertarians and (4) Extreme conservatives
- Half of GOP is angry at career politicians and seeking the opposite of a politician (Trump, Carson, Fiorina)

2016 Candidates:
Donald Trump, Ben Carson, Carly Fiorina, Ted Cruz

Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015
Clipart from Noun Project: Benjamin Harlow; Yi Chen

Unexpected Vacuum in Establishment Side Candidates Brings Rubio to the Forefront

Mainstream 2016 Candidates and Their Problems



Jeb Bush

- “Bush” brand has been damaged
- Unwilling to change positions that go against the grain
- His heart isn’t fully invested in the race

John Kasich

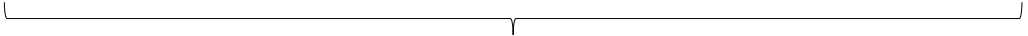
- Most qualified candidate in 2016 race; great resume
- Lacks focus and discipline

Chris Christie

- Lost momentum when Jeb entered the race
- Was “out-Trumped” in personality and attitude

Marco Rubio

- Has the best raw political skills in the GOP race
- Biggest threat to Democrats; could appeal to young voters and minorities
- Due to the unexpected vacuum in the polls, Rubio is **gaining traction** from the establishment side



All were expected to perform well; instead, their poll numbers are stuck in the single-digits

Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015

Trump and Carson Will Not Win the Nomination, Their Supporters Will Likely Move to Cruz

The Appeal of Trump and Carson and Why They Will Ultimately Fail



→
Trump supporters will shift to Cruz



←
Carson supporters will shift to Cruz



Donald Trump

- Appeals to Republicans who feel **angry**
- “Winner” attitude, blunt and “tell it like it is” persona

Ted Cruz

- Brilliant, skillful communicator
- Focused and relentless (opposite of Kasich)
- Has best campaign organization

Ben Carson

- Appeals to Republicans who feel **alienated**
- Polite, soft-spoken, gentle, “good bedside manner”

Analysis

- The election will become serious in **March** (Super Tuesday), people will shift from sending a message to actually picking a candidate
- When people start thinking about whether candidates have the **temperament** and **judgment** to succeed in the Situation Room, voters will move away from Trump and Carson
- Cruz is the most likely candidate to pick up their supporters

Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015

Charlie Cook Sheds Light on the 2016 Presidential Race

Recap of Key Takeaways From this Presentation

<p>Factors Affecting the 2016 Race</p>	<p>The unconventional nature of the 2016 presidential race can be explained by six interconnected features of the US political climate:</p> <ol style="list-style-type: none"> 1) The increasingly extreme ideological polarization of the Democratic and Republican Parties; 2) A culture war that stems from divergent conservative and liberal values; 3) The US electorate's economic anxiety; 4) A strong sense of populism; 5) Historically high levels of anger at Washington and career politicians; and 6) The apocalyptic sense that America and the American way of life is in danger
<p>Democratic Field</p>	<p>Hillary Clinton's path to the nomination is likely to remain clear, unless the Public Integrity section of the Justice Department recommends she be prosecuted for her e-mail server (relatively unlikely to happen)</p> <ul style="list-style-type: none"> • In the event that Hillary falters, the Democratic Party likely will not turn to Sanders or O'Malley, but Joe Biden
<p>Republican Field</p>	<p>A Divided Party: Republican voters and candidates can be broken down into about two, roughly equal brackets:</p> <ol style="list-style-type: none"> 1) An establishment bracket (e.g. Jeb Bush and Marco Rubio); and, 2) An exotic, anti-politician bracket (e.g. Carson and Trump) <p>Allure of non-politicians: Conventional candidates, such as Bush and Walker, have generally underwhelmed, creating a vacuum that could potentially be filled by unconventional candidates (e.g. Trump, Carson, and Fiorina)</p> <ul style="list-style-type: none"> • The Republican voters who are upset with the Washington status quo are drawn to who they see as the antithesis of a career politician, although this means something different for different groups of people • Trump and Carson: While Trump has been able to tap into a portion of the electorate's visceral anger with the political system, Carson appeals to an entirely different group of people, one that is drawn to his spirituality, kindness and past accomplishments as a doctor – the Trump and Carson votes are not interchangeable <p>Cruz's Potential: Ted Cruz has positioned himself to take advantage Trump's and Carson's lack of fluency with current political issues - Ted Cruz may be the candidate to inherit their votes when/if their appeal fades</p>

Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015

Charlie Cook Previews the General Election and 2016 Senate Races

Charlie Cook's Insights on Upcoming Elections

General Election	<p>An Election Defined by Change: but what kind of change?</p> <ul style="list-style-type: none"> • The answer to this question may determine whether a Democrat or Republican becomes president: • If the election becomes about a change in demographics, it will likely favor a Democrat • If the election becomes about effecting change in Washington, it will likely favor a Republican
US Senate Races	<p>Presidential Election America vs. Mid-Term Election America: During presidential elections, the voter turnout is broad and diverse, whereas during mid-term elections, the turnout is about 60% as large and tends to be older, more white, and more conservative</p> <ul style="list-style-type: none"> • During presidential years the demographics of the voting population heavily favor Democrats, while it favors Republicans during mid-term elections • There are seven Republican Senate seats that are up for reelection in states that Obama won in 2012, • There are zero Democratic seats up for vote in Romney states <p>The 2016 Picture: There are 6 Republican Senate seats that are in serious danger, and 1 Democratic seat in danger</p> <ul style="list-style-type: none"> • <i>Democratic Seats in Danger:</i> Harry Reid's vacant seat in Nevada • <i>Republican Seats in Danger:</i> Mark Kirk's seat in Illinois, Ron Johnson's in Wisconsin, Rob Portman's in Ohio, Pat Toomey's in Pennsylvania, Kelly Ayotte's in New Hampshire and Marco Rubio's vacant seat in Florida • Despite partisan chatter about the possibility of seats flipping in Colorado and North Carolina, Michael Bennet (D-CO) and Richard Burr (R-NC) are unlikely to lose their seats <p>Possible 2016 Senate Outcomes: Best case scenario for Republicans is a two seat loss, going from 54 Senate Republicans to 52.</p> <ul style="list-style-type: none"> • A three seat loss is more plausible, while four seats is entirely possible, and five seats is not out of the question, which leaves open the possibility of a Democratic majority in the Senate • Important to keep in mind that some of the closest Senate races are also some of the closest presidential states, and mid-term elections tend to be bad for whichever party is in the White House • Even if Republicans lose the majority in 2016, they will likely take it back in 2018 when many Democratic seats will be up

Source: Charlie Cook's Analysis, Breakfast Conversation at Charlie Palmer Steak, December 15, 2015

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