

## Storm Clouds Gathering for the Democrats

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There is one thing about the upcoming November midterm congressional elections that we can be pretty certain of: if Democrats manage to hold onto their control in the U.S. House and/or Senate, those majorities will be considerably smaller than they are today. And if Republicans win a majority in one or both chambers, their majorities will be considerably smaller than the ones that Democrats have enjoyed—if that is the appropriate word—for the last two years. Congress will certainly be more evenly divided between the two parties, making even the most routine and lowest common denominator legislative initiatives from either party very difficult to pass.

### Republicans: It's Not About You

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Republicans find themselves in a good news, bad news situation. The bad news is that voters still hold the Republican Party in disfavor—the GOP has hardly been forgiven for the 12-year tenure in control of Congress (12 years in the House, 9 and a half years in the Senate) and eight years in the presidency. Whether recalling the national debt doubling during the Bush administration, or the president's decision to go to war with Iraq, or the president and the Republican Congress' handling of the Terri Schiavo case, memories of Republican control are still not fond. The GOP's favorable/unfavorable ratings in the polls remain dismal.

But the good news for Republicans is that this election is not about them. Whenever a party holds the White House and controls both chambers in Congress, midterm elections are inevitably a referendum on the party in power.

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With polls showing just 30 percent of voters believing the country is headed in the right direction, 60 percent say it is off on the wrong track. This election is up or down on Democrats—it is not a choice and it is not a referendum on a party that, at least technically speaking, has little power. Midterm elections offer voters a chance to lash out and express their discontent, although it should be noted that when things are going well, voters rarely use these midterm elections to reward the party in power.

As of late summer, the House seems to be teetering on the edge of shifting into GOP hands, while the fight for a majority in the Senate seems to be getting tighter, though the odds still favor Democrats holding on by a little. The Gallup Organization reported that the president's job approval averaged 47.3 percent for his sixth quarter in office, ending July 19, 2010, fluctuating between 44 and 50 percent from day to day, putting him a bit better than President Ronald Reagan was at this stage, but a bit worse than where President Bill Clinton was. Both those president's parties faced ugly first term, midterm election losses. Clinton's Democratic Party entered the 1994 election cycle with majorities in the House and Senate, losing both in that election. Reagan's Republican Party held a majority in the Senate going into the 1982 election but Democrats controlled the House, a partially divided government situation.

### **How Worried Should Democrats Be?**

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For over a year, storm clouds have been gathering for President Barack Obama and the Democrats. The confluence of a number of decisions they made and circumstances which worked against them will likely lead to them sustaining

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greater losses than parties normally suffering in first term, midterm elections. The most severe economic downturn since the Great Depression was accompanied by significantly higher unemployment than was anticipated and followed by an unusually anemic recovery. This would have caused serious losses for almost any party that held the White House and had majorities in both the House and Senate (read: total responsibility for governing). While polls showed voters acknowledged that the recession began under

Obama's predecessor, President George W. Bush, and blamed his economic policies for many of the current woes, over the course of two years, a new president and party in control naturally came to “own” the economy, for better, or in this case, worse.

While voters blame Bush for the recession, they are highly critical of the handling of the economy by Obama and the Democratic Congress, finding much to fault in the \$787 billion economic stimulus package that Obama and the Democratic majorities enacted in early 2009. Polls show that over half of voters believed that the package did little if any good and many say that it simply exacerbated already mounting federal budget deficits. In one of the first successful message battles won by Republicans in years, they were very effective in discrediting much of the stimulus plan both for its size and because it included stimulus for areas where Democrats inserted many pet spending items that had gone unfunded or underfunded in the previous eight years. Though the motive was laudable, not all of it was committed to labor-intensive job creation, where the stimulus would get the most bang for the buck.

There also was a toll paid by Democrats who were seen as having spent 2009 and early 2010 overly focused on health care and more disengaged on economic policy than they would have liked. Presidential candidate Clinton's 1992 campaign promise that, if elected, he would "focus on the economy like a laser beam" was more what they had in mind.

Hindsight is always 20–20 and, to be fair, it should be noted that, back in the earliest weeks of the Obama administration, economists inside the administration and out almost uniformly underestimated how high the jobless rate would go. In January 2009, the Blue Chip Economic Indicators survey of top economists reported a consensus unemployment rate for calendar year 2010 of 8.2 percent. By July 2010, that consensus forecast was 9.6 percent. The politics of dealing with an election year unemployment rate of 9.6 percent is a lot different than 8.2 percent. Indeed, the policies pursued would undoubtedly be different.

### **Too Much Government or Too Little?**

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But a bigger and more fundamental force seems to be at work. Many Americans appear to be developing two very different and somewhat contradictory points of view. First, that the federal government has become dangerously out of control; and second, that it is ineffectual and cannot do anything right. With almost half of Americans subscribing to one or both attitudes, it means that an activist president and a Democratic Congress are on exceedingly thin ice, with their whole reason for being called into question.

For several generations, Americans had blithely ignored warnings that government spending had grown too large, that spending had outstripped tax revenues, that deficits were getting too high, and that entitlement programs were in need of reform. While professing support for controlling the size of government, most voters welcomed the largesse that their members of Congress brought home, with the influence of congressional appropriators

valued at home most of all for their ability to secure funding for projects back home, both those badly needed and those of more dubious value.

Like in the children's story about Chicken Little warning that the sky would fall, the sky did begin to fall for numerous Americans in September 2008 when Lehman Brothers fell, credit markets seized up, the worldwide economy seemed to go into cardiac arrest, and the Dow Jones Industrial Average dropped 800 points in a single day. Traumatized by the sudden crisis, on a personal level, Americans began to spend less, save more, and pay down debt as much as they could, behaving in a far more conservative manner in their personal finances they had in many years.

Over time after the crisis, voters began to react strongly as well. Conservative voters who had expressed little outrage over deficits while the GOP was in charge suddenly became vociferous in their long-held opposition to federal spending. Proposed cap-and-trade climate change and health care reform proposals took them to an even higher level of anger, some flocking to congressional town hall

meetings screaming at elected officials, spawning the Tea Party movement.

In eight NBC News/*Wall Street Journal* (WSJ) polls, conducted between January 2002 and April 2009, when asked if they believed "government should do more to solve problems and help meet the needs of people" or if "government is doing too many things better left to business and individuals" more Americans said government should do more each time. Sometimes the margin was

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very wide. In September 2007, 55 percent believed government should do more while 38 percent thought government was trying to do too much, a 17-point differential. Other times it was just a single point, as in April 2009, but every time, more sided with greater governmental efforts. More recently however, in four straight NBC/WSJ polls, more respondents thought that government was doing too many things—not by wide margins, generally two to five points—but definitely a different pattern than before.

But among the less ideological independent voters—those usually less engaged in politics but who are critical swing votes in elections—a rather remarkable change began to take place. While Democrats have long tended to believe that government should do more and Republicans that government was trying to do too much, independent voters who generally sided by a few points on the side of more government shifted significantly in September 2009, with 56 percent on the government doing too many things side and 35 percent that government should do more. In the five polls starting in September 2009, the

less government side was greater than the pro-government side by 10 to 21 percentage points, most recently in June 2010 by 15 points (55 to 40 percent). Having swing voters shift their attitudes toward the role of government so decisively will inevitably have electoral and policy implications.

In 2006, independents supported Democrats for Congress by an 18-point margin—the margin was eight points in 2008. The swing among independents, which approximates the national popular vote for the House, translates into seats very clearly. In Gallup polling this year, Republicans have averaged a ten-point lead in the generic congressional ballot test. A swing from eight points in favor of Democrats in 2008 to ten points for the GOP this year, an 18-point reversal, would if it continues, have a dramatic impact in swing congressional districts and key House and Senate races.

## Two Main Challenges

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It is impossible to prove but seems very likely that this idea of governmental overreach—that government was trying to do more than it could adequately fund or effectively do—along with the weak economy have become the two overarching dynamics in this election. These two monumental challenges would have seemed unlikely when Obama took office and Democrats celebrated his inauguration, but are very real today.

To win a House majority, Republicans must register a net gain of 39 seats, a tall order but doable when looking at the strong gains that Democrats had scored in the last two elections. A total of 53 House Democrats are in seats held by Republicans four years ago, 48 are in districts won by Senator John McCain (R–AZ) in 2008, and 47 in districts that voted Republican for president in the last two elections. While Obama's low popularity hurts Democrats in some districts, in others it is the disfavor with which the Democratic Congress itself is held.

House Speaker Nancy Pelosi (D–CA) and Senate Majority Leader Harry Reid (D–NV) have taken much higher profiles than many past congressional leaders and have become far more polarizing than most. When Democrats lost their majorities in the House and Senate in 1994, Speaker Tom Foley (D–CT) and Senate Majority Leader George Mitchell (D–ME) were not well known outside the Capitol Beltway and certainly had not become the faces of the Democratic majorities. Former Speaker Newt Gingrich (R–GA) was long gone from the House in 2006 and House Majority Leader Tom DeLay (R–TX) had left for Houston five months before the election, while Speaker Dennis Hastert (R–IL) and Senate Majority Leader Bill Frist (R–TN) were hardly liabilities for their party. In some districts, Pelosi and Reid have become the images that voters have

when they think of the Democratic Party, and that has hurt far more than helped.

On a race-by-race basis, Democrats appear likely to suffer tough losses, but could be expected to hang on. Only if there is a powerful political tidal wave, like those seen in 1958, 1966, 1974, 1994, and 2006, would Democrats lose their majority. But the signs have been growing for almost a year that such a wave might well be in the offing.

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While Democrats also look likely to sustain big losses in the Senate, at this point it looks much more likely than not that they will retain their majority, albeit at a greatly reduced level. Of the 18 total seats that the *Cook Political Report* rates as possibly changing hands, the GOP would have to

win 16, which would be hard to do even in a fantastic year for Republicans. To retake their Senate majority lost in 2006, Republicans must score a net gain of ten seats, simply a nine seat gain in the chamber—currently split 59 Democrats to 41 Republicans—and would result in parity with Vice President Joe Biden able to cast the deciding vote. Republicans appear likely to pick up at last five Senate seats, perhaps as many as eight, but nine or even ten look very difficult.

While there is probably not a Republican Senate in our immediate future, with Democrats having enjoyed net gains of six seats in 2006 and eight in 2008, Democrats must defend 43 Democratic seats in the 2012 and 2014 elections, compared to just 23 for the GOP. Thus, while Democrats may well hold onto their majority this November, the odds of the GOP getting close in 2010 and winning a majority in 2012 or 2014 are pretty good, though the political environment in those years would obviously be important factors.

Whether Democrats cling to razor-thin majorities in one or both chambers of Congress or Republicans win narrowly, no other option seems at all likely. Congress will be far more evenly divided than today, and the dynamics of Obama dealing with a Senate that was split 59 Democrats to 41 Republicans, or a House where Democrats hold 59 percent of the seats, will be dramatically different. Stalemate and paralysis is far more likely to be the norm than it is even today and the political climate no less contentious.