

From Swings to Poles?

President George W. Bush's fate looks increasingly likely to turn on three lines of questioning. First, to what extent is the U.S. economy improving? Will it begin creating sufficient new jobs on a sustained basis to aid in Bush's reelection, or will the economy languish with what some call a jobless recovery, ruining his shot at a second term? Second, what will the situation in Iraq look like next year, and just as important, how will Americans see this situation? Could the combination of a lack of evidence connecting Saddam Hussein to the September 11 attacks, the failure to find any weapons of mass destruction in Iraq, successive problems with the occupation of Iraq, and the proposed \$87 billion price tag for the military operations in and reconstruction of Iraq and Afghanistan erode public confidence in the president? Finally, will a major act of terrorism against the United States or U.S. citizens occur between late 2003 and the November 2004 election, and if so, will most Americans see such an attack as beyond the U.S. government's control or something that could have been anticipated and prevented?

If the economy recovers and a meaningful number of new jobs are created, if the occupation of Iraq is going well, and if no new major acts of terrorism occur—or to the extent that they do, they do not seem preventable—then the Democrats could nominate the reincarnation of Franklin D. Roosevelt or John F. Kennedy and still lose. On the other hand, if one or more of these three factors follows a negative course, the presidential election could easily become a very close race, reflecting the evenly divided partisan division in this country. Just about anyone who plausibly could be seen as winning the Democratic nomination would seem perfectly capable of winning the general election.

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A Referendum on the President

Although almost a cliché, it remains the reality that a presidential election is, in effect, a referendum on the incumbent when the incumbent seeks a second term. Do voters believe that the incumbent has done a sufficiently good job to deserve reelection? Do voters have enough confidence in the president to elect him to serve for another four years? If the president deserves reelection and enjoys the confidence of the American public, then it really does not matter whom the opposition party nominates—the election is over. If voters do not believe that the president's performance has earned him the right to reelection and he has lost their confidence, then who the opponent is (within reason) becomes almost equally irrelevant—the incumbent will lose. Only when the public remains legitimately unsure or has a mixed opinion on the president's performance does the opponent and the two campaigns become a relevant part of the equation. Otherwise, circumstances drive the outcome.

IT'S STILL THE ECONOMY, STUPID

Experts tell us that, normally, an economic growth rate (real change in gross domestic product) of 4.0–4.5 percent is necessary for meaningful new job creation. During this period of extraordinary gains in productivity, referred to as a jobless recovery, perhaps an even higher growth rate might be necessary. At this writing in September 2003, the U.S. Department of Labor reports that 129,862,000 Americans are employed in nonagricultural jobs, compared with 132,436,000 in January 2001, when Bush took office, a loss of 2,574,000 jobs. The last president to experience a net decrease of as much as one job during four years in office was Herbert Hoover (1929–1933). The job deficit may or may not be a determinative factor in the upcoming election, but if the economy and jobs are important and this trend is not substantially reversed, Bush is in very serious trouble.

A high rate of unemployment does not guarantee that an incumbent will lose the election. President Ronald Reagan carried 49 states and was easily reelected in 1984, when the unemployment rate was 7.2 percent in both June 1984 and November of that same year. Since January 1983, the unemployment rate was dropping from substantially higher levels, so even though it was high, the arrow was very clearly headed in the right direction. Bush does not need to eliminate the entire job deficit during his term, but history suggests that he must turn the tide by the second quarter of 2004. The United States needs to see clear improvement in the economy and on the job front especially for the Bush administration to gain the benefits, or at least not have it be a liability, on Election Day.

Republicans argue, with justification, that the economy is not just about jobs, that it is also about affordability, that Americans need to be able to feel that they can afford the necessities (and perhaps a few niceties) of life. When the economy is viewed from this standpoint, the situation does not seem so bad: inflation is low, except when it comes to the cost of health care; and many Americans are doing quite well, which moderates the impact of the unemployment situation to a certain extent. To the extent that Americans are worried about their jobs, their businesses, and their futures, however, the job deficit can erode much of the advantages of a low inflation rate. Polls continue to show that Americans still prioritize the economy as a main concern, that the numbers of those who approve of Bush's handling of the economy are now lower than the number of those who disapprove, and that many do not consider his tax cut-based economic stimulus package to have made a significant difference.

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In short, the economy remains a real question mark for the president's hopes for reelection, with some economic statistics pointing to a strong recovery while others suggest that the economic situation remains poor and we have not yet turned the corner. The economy is unlikely to become a significant asset for Bush, but it is not clear whether it will be a major liability.

WHAT ABOUT IRAQ?

Until Bush's September 7, 2003, speech to the nation, the U.S. public remained largely but cautiously supportive of the war in Iraq and his handling of the situation. After the speech, enthusiasm began to wane noticeably, with Gallup polls beginning to show the percentage of Americans who felt that the war was worth fighting only three points higher than the percentage who said it was not. The cost of the war in terms of money and lives has begun to take its toll. Whether the president's mid-September admission that there was no direct connection between Saddam and the September 11 attacks would affect the public's attitudes toward the war is unclear, especially because this statement was widely at variance with an August *Washington Post* poll that suggested that 69 percent of Americans believed that it was at least likely that the former Iraqi leader was somehow connected to the attacks on the World Trade Center and the Pentagon.

An argument can be made that, as long as Americans see the war in Iraq as central to the war on terrorism and to preventing a future terrorist attack, the public's resolve should remain strong and therefore Iraq will not be

a liability for the president. Indeed, some argue that national security will remain a strong point for the president as long as Democrats have little credibility on this particular issue. To the extent that Americans may eventually see the situation in Iraq as increasingly disconnected from their own concerns and the U.S. presence there unnecessary, however, the cost in terms of American lives and to the U.S. Treasury could become a real liability for the president.

The Iraq question means that the role of Gen. Wesley Clark (Ret.) could become important. Until now, Democrats have not had a highly visible spokesperson with credibility on national security issues attacking Bush's foreign policies. Whether or not Clark becomes the Democratic nominee, his ability to retain his credibility and attack the president presents a very real potential problem for Bush. You can bet that Republican strategists, as well as all of Clark's Democratic rivals' advisers, will strive to undermine the general's credibility as quickly as possible.

ANOTHER STRIKE?

At this point, it is impossible to say what kinds of potential acts of terrorism would and would not be blamed on the Bush administration. Americans tend to rally behind their leader during times of crisis, and that is still the most likely immediate public reaction to any new terrorist act. The second stage, however, would be to decide whether or not the attack could and should have been prevented. That conclusion, and the timing of any potential attack, will color the public's perception of whether Bush can effectively protect the nation.

A Polarized Political Landscape

The 2004 elections come at a time when the country is evenly divided and highly polarized. Since the 2000 election, the partisan division in the country has been almost universally accepted, but the high level of polarization between the two political parties has attracted greater attention in recent months. The proportion of the Democratic Party that hates Bush is not insubstantial; many Democrats loathe him with an intensity that never existed toward his father or Presidents Reagan, Gerald Ford, or Dwight Eisenhower. In more recent times, only President Richard Nixon has been the target of comparable animosity among Democrats. The animosity that Democrats feel toward Bush is in fact quite similar to the extent to which Republicans despise former president Bill Clinton (as well as Senator Hillary Rodham Clinton [D-N.Y.]) and former vice president Al Gore. One would have to go

as far back as Franklin Roosevelt to find a Democratic president more hated by Republicans than Clinton was. At the same time, conservatives love the current Bush in a way they never loved his father.

The bases of both parties are energized and motivated, and the reality of a theory first espoused in an August *New York Times* front-page story by Adam Nagourney may be emerging.¹ The United States may be entering an era of confrontation between the bases of the two parties, with the swing voters—so cherished by strategists during the 1990s—now taking a backseat to the activists and ideologues on each side. Although the smart campaign will focus both on the party's base and its swing voters (walking and chewing gum at the same time), the emphasis may well shift away from swing voters, which will largely influence the nature of the messages each side aims to send.

With the nation so evenly divided and so highly polarized, most indicators predict a very close general election. Assuming a close election, strategists in each party believe that the battleground for the 2004 presidential election will center on 17 states: Arkansas, Florida, Iowa, Maine, Michigan, Minnesota, Missouri, Nevada, New Hampshire, New Mexico, Ohio, Oregon, Pennsylvania, Tennessee, Washington, West Virginia, and Wisconsin. Some Democrats also add Arizona to the list, even though it is not yet clear whether the growth of the heavily Democratic Hispanic vote in the state and the influx of new and less conservative voters into the state over the last decade will make Arizona a close enough vote in time for it to be potentially decisive in the upcoming election.

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A Predictable Democratic Nomination?

On the Democratic side, although it is much too soon to assess whether Clark's candidacy will take off, the juggernaut of Vermont's Howard Dean persists. As recently as January 2003, Senator John Kerry of Massachusetts was the nominal front-runner for the nomination; very few, if any, anticipated that the former governor of Vermont would assume first place not only in Iowa and New Hampshire but also in fund-raising by the end of summer. That such an underdog and early long shot could become the front-runner without pulling off an upset in an early caucus, primary, or even straw poll is pretty remarkable. With most Democratic congressional leaders and the party's other first-tier presidential candidates having voted

in favor of the war in Iraq, Dean stood out and soon personified national opposition to the war. He later took advantage of the frustration felt by many Democrats who saw their party's leadership as too passive and unwilling to confront Bush more aggressively on the issues. The growing animosity toward Bush among many Democrats turned into fertile ground for Dean, with other Democrats stepping up their level of criticism only later in the campaign.

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At this point, for Howard Dean not to become the Democratic nominee, someone will have to take the nomination away from him. Dean is leading Representative Richard Gephardt of Missouri in Iowa caucus polls by only about five or six points, about half of the dozen-point lead that Dean enjoys over Kerry in New Hampshire's primary polls. In addition, cau-

cuses are tests of a candidate's political organization; therefore, Gephardt's strong support among organized labor, who are veterans of the caucus process, might give him an advantage over Dean, whose campaign is driven more by neophytes than by campaign veterans and professionals, at least on the state and local level. So, Iowa is one possible place for a Dean derailment—a scenario that is more plausible than a Kerry upset of Dean in New Hampshire.

If Dean wins over Gephardt in Iowa and over Kerry in New Hampshire, however, the next question arises: Who will emerge as the anti-Dean candidate once the campaign turns south and west? An Iowa loss would no doubt doom the financially undernourished Gephardt campaign, while a New Hampshire loss for Kerry could kill him or perhaps just badly wound him, allowing him to continue on, albeit bloodied and weakened. Although Kerry could still emerge as the anti-Dean alternative, that mantle might more likely fall to Senators John Edwards of North Carolina or Joe Lieberman of Connecticut or perhaps it will go to the newest entrant in the race, Clark. Undoubtedly, an anti-Dean candidacy would emerge, but whether it could stop Dean's momentum is highly debatable. In every contested battle for a presidential nomination, an effort is made to halt the momentum of the Iowa and/or New Hampshire winner; these attempts rarely succeed. Any candidate who does not have momentum coming out of the first two contests is highly unlikely to wrest the nomination away from those who do. (Indeed, some argue that Bill Clinton, otherwise known as the Comeback Kid, won New Hampshire in 1992 with his strong second-place finish behind former senator Paul Tsongas [Mass.], even in the face of allegations of adultery that had emerged just a week before the primary.)

How Clark will fare remains a mystery. National polls taken within days of his entry into the race showed him at least tied for first place and in some cases holding a formidable lead. Of course, because there is no national primary, the value of such polls is rather limited, with states such as Iowa and New Hampshire enormously important and the value of large, heavily populated states such as California, New York, Ohio, and Texas minimal, except for campaign contributions. The early polls suggest that at least a part of Clark's appeal is a reflection of the electorate's view of the retired general more as a concept than as a person. Apart from a vague outline of a handful of biographical characteristics, the public knows little about Clark the person.

Initial public support for Clark could be compared with the situation in the late spring and early summer of 1992 when many voters became enamored of billionaire Ross Perot and fell in love with the concept of a non-Washingtonian, nonpolitician, self-made man un beholden to the special interests that dominate both parties. Once the time came to reconcile the concept with the man, however, the two did not match up, with Perot the man coming up far short of the concept for which voters had been so hopeful. Although these early polls show that Americans have taken an instant liking to the concept of Clark, we will need to wait and see whether he can live up to that concept.

Moreover, no matter how accomplished in their previous endeavors, first-time candidates for public office, particularly for high office, make mistakes. Being an enormously successful businessman or military leader may give a candidate unique skills that could prove helpful in governing the country, but the same candidates often have little experience that will help them cope with the challenges of running for office, let alone doing the job once they get it. Both the news media and political opponents essentially put front-running presidential candidates under an electron microscope. Mistakes, both real and imagined, take on huge significance and are often blown out of proportion. Clark committed one of these mistakes in his first 24 hours as a candidate when he flip-flopped on the question of how he would he have voted on the Iraq war resolution had he been in Congress. His response—turning to his press secretary and pleading, “Help me, Mary”—cannot be replicated many more times before his credibility as a candidate is significantly undermined.

Clark then faces the challenges of putting together a presidential campaign and raising the money necessary to fund a campaign in such a short period of time. Very little time remains between now and the onset of cau-

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cuses and primaries, and much of the top talent in the Democratic Party—those with the experience and skills to pull off a Democratic nomination win for their candidate of choice—have been largely picked over by the nine candidates who entered the race earlier. Numerous reasons why Clark might not win the nomination exist; in fact, any one or two of them could sufficiently do the trick. Until Clark overcomes these obstacles, therefore, Dean should be considered the front-runner for the Democratic nomination.

Things Heat Up in the Spring

Numerous questions about the election still remain, with the president's poll numbers becoming more relevant after the first of the year and economic numbers more important during the second quarter. History tells us that job approval ratings prior to the end of the year preceding the election are of no value in predicting the electoral outcome. Polling numbers become more relevant the further into the election year we go. In terms of economic indicators, history tells us that the state and direction of the economy during the second quarter of the election year are the best predictors of the results; if the ratings turn around later, as Bush's father experienced, it will be too late for the numbers to make a difference.

Note

1. Adam Nagourney, "Political Parties Shift Emphasis to Core Voters" *New York Times*, August 31, 2003, p. 1.