

Charlie Cook

Editor and Publisher of *The Cook Political Report*

Political Analyst for the National Journal Group

December 13, 2004

This was a fascinating election. It was a good solid and decisive win for President Bush and the Republican Party. This was the best-planned, designed, and executed Presidential campaign in American history. This was an important election, but it was hardly a transformational or realigning election, which is when a decisive win at the top is also decisive at every level beneath it. This election, while a big and a decisive win, doesn't really meet those characterizations. One final point: Second-term, mid-term elections are really ugly for the party holding the White House. History tells us that in four out of the five of these elections since the end of World War II, bad things have happened to the party holding the White House. Typically they goosed the economy up during the election year, so there has been a little bit of a sag afterwards. They tend to lose energy, lose focus, run out of gas, run out of new ideas, get arrogant, scandals start hitting. But four out of five is a pretty high correlation.

Vernon Jordan

Ladies and gentlemen, welcome again to the Economic Club. We are delighted that you could be with us this afternoon. Today's speaker is a man who, frankly, needs little introduction to a politically attuned Washington audience. Charlie Cook is Editor and Publisher of *The Cook Political Report* and a political analyst for the National Journal

Group. He writes a weekly column for *National Journal* magazine, and also is an analyst for *NBC News*, as well as *MSNBC and CNBC*, where he appears regularly on *CNBC's* evening program, *Capitol Report*. Mr. Cook also helps to oversee the Ipsos – Public Affairs Poll, which is a national survey of 1,000 adults, conducted twice a month, to gauge public attitudes on a variety of political and economic issues. Before he joined the National Journal Group in 1998, for 12 years Mr. Cook wrote a twice-weekly column in *Roll Call*, the newspaper of Capitol Hill.

One of the nation's most acclaimed political experts, Mr. Cook has been described by *The Washington Post's* David Broder as “perhaps the best nonpartisan tracker of Congressional races.” *The New York Times* characterized his newsletter, *The Cook Political Report*, as “a newsletter that both parties regard as authoritative.”

It gives me great pleasure to welcome to The Economic Club of Washington, Charlie Cook.

Charlie Cook

Thank you. When people say that it is an honor to speak to a group, in this case it is actually true. My old friend Ann Wexler once mentioned that I might speak to The Economic Club, and I thought Ann was just flattering me. But then, when I was seated next to Vernon at a dinner this summer in Boston, he said something about it and I didn't even know he knew who I was. It really is a thrill. All I can say is, there are a couple of economics professors from Georgetown who are now rolling over in their graves that I am before you today.

I always like to start off by doing a survey of the room. Raise your hand if you are, as I am, from a state that has had three consecutive state insurance commissioners go to federal prison. Raise your hand if you are, as I am, from a state that has a Governor's race in the past 15 to 20 years where both the Democratic and Republican nominees later went to federal prison. Just a couple of those. I am talking about Louisiana, the 1991 Governor's race between David Duke, who was a former grand dragon and wizard of the Ku Klux Klan, and Edwin Edwards, the incumbent who was a crook and a philanderer, and the good guy in the race. A bumper sticker said, "Vote for the Crook, It's Important." The high point of the race was when Governor Edwards, referring to Duke, said, "Well, we have one thing in common, I'm a wizard under the sheets, too." Don't worry, I'm not going any further. Only in Louisiana would you have something like that. It was a great place to learn politics before I came to Washington 32 years ago.

This was a fascinating election. I always enjoy doing post-election analysis more than pre-election because hindsight is always 20/20. These kinds of elections always have millions and millions of moving parts. The bottom line is that this was a good, solid, decisive win for President Bush and the Republican Party. I think that this Bush campaign actually has one of the architects, Jack Oliver, sitting right over here. This was the best-planned, designed, and executed Presidential campaign in American history. Their use of strategy and tactics was absolutely flawless. We could spend a lot of time talking about where the Democrats went wrong and what they did wrong and Senator Kerry's shortcomings. Any discussion of this race would have to begin with the fact that this campaign was at least on a par with and quite possibly superior to the Nixon

campaign of 1972, the Clinton campaign of 1992, the Reagan campaign of 1984, just the great campaigns in American history. This one is absolutely right there.

Now, the four-seat gain that the Republicans enjoyed in the U.S. Senate was sort of an exclamation point. If there was any doubt at all in terms of which side had won, the unexpected gain of four seats for Republicans certainly ended that. This was an important election, and it was a clean win. But it was hardly a transformational or realigning election. A transformational, realigning election is when you have a decisive win at the top that is also decisive at every level beneath it, big gains from top to bottom of the ballot. That's when you have the 1974 Watergate election, the 1980 Reagan landslide election, and 1994, those were transformational elections that were pretty big from top to bottom. In this election, while a big and a decisive win, doesn't really meet those characterizations.

A couple of years ago, Michael Barone, the principal author of the *Almanac of American Politics*, wrote that we lived in a 49/49 nation, and that was very, very true. If we were in a 49/49 nation then, we are probably in a 51/48 nation now, because not only was that the popular vote for the Presidency, but it was pretty much the popular vote for the U.S. House of Representatives, 51% Republicans and 47% or 48%, sort of right on the cusp in the popular vote for the House of Representatives. We have a natural tendency to call anybody who gets 51% a genius and anybody who gets 48% a goat. We also know that close counts in horseshoes and hand grenades. The thing that determined this Presidential election was obviously 119,000 votes out of 5.5 million cast in the State of Ohio, out of 120 million cast nationwide.

Look at the House of Representatives. If it hadn't been for redistricting, instead of picking up three seats, Republicans would have lost a couple of seats in the House of Representatives. So, yes, they picked up seats in the House of Representatives, but it was almost more of a technical win based more on a one-time in modern history realignment during the middle of the decade than on anything else. Look at state legislative seats. Republicans actually lost seats in the state legislatures around the country. It wasn't very many, it was just a few dozen. It is interesting that, of 7,382 state representatives and state senators in this country, as of about 2 weeks ago there were 3,657 Democrats and 3,657 Republicans. It was exactly the same. Democrats picked up a couple, and there were still some recounts out there, so I don't know who is ahead by a seat or two. But the thing about it is that you don't lose a few state legislative seats nationwide and call it a net loss. You would if you were having a transformational election.

The one place that really was big was obviously the Senate. It is very clear that the Republican realignment of the U.S. Senate is alive and well and continuing. When you look at the four-seat net gain, when you look at the six seats that Republicans gained all told and then lost two, every one of the six seats they gained was in a state that President Bush carried 4 years ago and this year. Four seats were Deep South states, and the other was Florida, which I am not sure is a South state. I consider Florida more a state of confusion. Then there was, obviously, South Dakota, where Tom Daschle lost to John Foon, who certainly was one of the biggest Republican heroes of the day.

But basically what you are seeing is a continuing realignment of the South, and that explains pretty much what happened in the U.S. Senate. The fascinating thing in this election has to do with turnout and with that 51%/48% victory. How did that occur?

Based on some of the preliminary numbers, a friend of mine, Allen Abramowitz, a political scientist from Emory University, figured out that in the 12 swing states, purple states or most purple states, the turnout went up by roughly 17.3% over 2000. Wow: 17.3% is really a lot! In the deep red states, the states we knew President Bush was going to carry, turnout went up almost as much, 14.9%. But in the deep blue states, the states that everybody knew Kerry was going to win, turnout went up by less than 2 percentage points, basically 1.9 percentage points. In other words, if you lived in a state that you knew President Bush was going to carry, turnout was real strong there. But in the states we knew Kerry was going to win, turnout hardly went up at all.

The biggest piece of that probably has to do with the fact that Republicans were voting for someone. Democrats weren't voting for someone. Democrats were voting against someone. For some reason, if you didn't think your vote was going to matter, if you knew that your guy was going to win that state no matter what, you just didn't bother to show up. This highlights the next point about Kerry as a candidate. I'll talk about Kerry and the campaign and then talk about the Democratic Party.

Kerry as a candidate. It's poor form to kick a guy while he is down, but I'll do it anyway. I can't point to a single state, a single demographic group, a single political subgroup that went for John Kerry that wouldn't have gone for just about any other Democrat running against President Bush under these circumstances. Kerry got pretty much the default Democratic vote and just not much more than that. That is a real problem. It is based on a couple of things. One is that, first and foremost, a Presidential election involving an incumbent is a referendum on that incumbent. Do you feel that the President has performed well enough to deserve reelection? Do you have confidence in

that President to lead for another 4 years? That is incredibly important. But think about when, in the past 34 years, incumbent Presidents have lost reelections.

In each of those cases, three circumstances existed. Number one, the economy was either lousy or widely seen as being lousy. Number two, the challenger was interesting, maybe compelling, maybe even charismatic, but certainly at least one of those three. Finally, the challenger had a message that was perfectly crafted, perfectly pitched for the circumstances of that year. Think back to 1976, in the first post-Watergate Presidential election. People were angry at politics and politicians. They were angry at Washington. They wanted change, and the economy was lousy. Who ever heard of this Naval Academy graduate, former nuclear submarine officer, former Georgia Governor with a family that was straight out of the movie Fried Green Tomatoes? Remember Ms. Lillian, Jimmy Carter's mother? Remember brother Billy? Now, I maintain that in the South, and maybe other parts of the country, in every Southern family there is a son or nephew who was behind the door when God passed out brains. Certainly Bill Clinton had Roger and Jimmy Carter certainly had Billy. Remember Billy Beer? There was that great story that Congressman Udall used to tell, that Billy Carter licensed his name for a beer, and it came out that Udall went out and bought a six pack and he brought it home and he opened one up and took a sip and it was so foul that he poured it in a mason jar and sent it to a chemist for analysis. The report came back a week later said, "Mr. Udall, I am sorry to inform you that your horse has diabetes."

Jimmy Carter was a very interesting person, and what was his message? His message was, I am not a career politician, I'm not like all the others, and I will never lie

to you. That was a message that would not have worked 4 or 8 or 12 or 16 years earlier or later, but it was perfect for 1976.

Fast forward to 1980. The economy was a mess again. The hostages were in Iran. We had an ill-fated attempt to rescue the hostages. People were suffering from low self-esteem. Along came this candidate Ronald Reagan, who projected strength and confidence in leadership and had a message that he was going to reduce the size of government. He was going to cut taxes. He was going to make Americans feel better about themselves and their country. He was interesting, he was charismatic, he was a compelling candidate, and he had a message that was absolutely perfect for 1980.

Fast-forward 12 years to 1992. The economy was in the doldrums again, starting to come out of a recession, but most people didn't realize it. Bill Clinton came along. He was certainly interesting and charismatic and had a message that he was going to focus on the economy like a laser beam. He had no real credentials on the foreign policy side, but that's okay, we'd had foreign policy before. The Cold War was over. We wanted somebody to focus on domestic issues and the economy, two areas the public thought had been overlooked before.

So, there were the three ingredients: the economy was a problem, there was an interesting and compelling or charismatic candidate, and the message was perfect for the year. It is hard to look at John Kerry and see him as an interesting or compelling or charismatic candidate, while he talked about the economy, jobs, healthcare, and prescription drugs, and this and that. It's just really hard to look at Kerry's message and say that it fit seamlessly, hand and glove, with the year in the same way that Jimmy Carter's did, that Ronald Reagan's did, that Bill Clinton's did. Just given the match up,

you might have been able to get that square peg into that round hole, but it was going to take a couple of poundings to do it. It didn't fit in as easily as the others.

If you compare the two campaigns, look no farther than the two conventions. The most memorable thing at the Democratic Convention was that incredibly impressive speech by that young African-American State Senator from Illinois, Barack Obama, since elected to the U.S. Senate. It was truly a memorable speech. The problem is, if you are getting nominated for President of the United States, the most memorable thing about your convention has nothing to do with you or the office you are running for. That's kind of a problem. That really is.

Compare that with the Republican Convention in New York. They needed someone to talk about the importance of 9/11, how 9/11 changed the country, changed the world, and changed the Presidency, yet not be seen as exploiting 9/11. So, they went out and got Rudi Giuliani, who just hit a home run. They needed someone to talk about the war in Iraq and to lay out the Administration's case for the war in Iraq, but they wanted someone that was seen as independent of the Administration and someone who had a lot of credibility. So they went out and found the guy who ran against George Bush 4 years earlier, John McCain, who hit a home run. Then they needed someone to talk about the President's economic philosophy of an opportunity society, economic self-reliance. So, they went out and found this Austrian immigrant named Arnold Schwarzenegger, who hit a home run. Finally they needed someone just to take John Kerry's head off and they got Zell Miller, a Democratic Senator from Georgia, who did a fabulous job.

Now, I don't think anybody went to Zell Miller and said, "Senator, tone it down, don't criticize Senator Kerry too much, we want this to be a positive, upbeat convention." That is exactly the advice that President Clinton got before he gave his speech, and all the other speakers got in the Democratic Convention, tone it down, be positive, be upbeat, we want to emphasize leadership. Which was just an enormous miscalculation.

One other point, in just about every election I ever saw, 51% of the electorate was female and 49% was male, because women live longer than men do. Then 4 years ago, Al Gore, God's gift to charisma and modern campaigning, won the female vote by 11 percentage points. This time, women constituted 49% of the electorate, not 51%, and John Kerry won the female voters by 3 percentage points, not 11. While President Bush did carry the male vote by 11 points, same as he did last time, something had happened. A lot of it had to do with message discipline, of not staying honed in on the messages that really mattered.

Do I think that another Democrat might have won this? We'll never know. This is not a computer game or video game where you can go back and do it exactly the same but make one change. But, I suspect so. I suspect that there are other Democrats who might have been able to articulate the jobs issue better in Ohio than someone who sounded like Thurston Howell III. But, we do finally get to something about the Democratic Party because the Democratic Party can get to 48% real easily. They can get to 240-something electoral votes without too much difficulty. But, getting from 48% to 50% and getting from 240 electoral votes to 270, that's what really matters. You can argue about whether Democrats should or should not forfeit or have any choice about forfeiting the South, but there is no question that if you forfeit the South, you better

sweep the Midwest and Heartland states. You better not have problems winning Michigan and Wisconsin. You better carry Iowa. And you better pick up Ohio, under the right circumstances, if jobs are a real problem. If you look at that red/blue map of America— not at the state level, but the county level—what you pretty much see for the Democrats is heavily minority areas and then the cities and close-in suburbs, and basically that's it. You'll see a little string of blue counties along the Mississippi River coming up from New Orleans, parishes and counties in Louisiana, Mississippi, Arkansas, Tennessee, that are heavily African American. You see this little strip zigzag across Mississippi, Alabama, South Carolina, and part of Georgia that is the black belt of heavily African-American voters. You see some heavily Hispanic states down here. Other than that, it's basically cities and close-in suburbs.

Look at the Washington metropolitan area. You have DC. You have Arlington, Alexandria, Montgomery, Prince George's counties, all blue. But when you start going out in concentric circles from that point, it gets whiter, it gets more conservative, it gets more Republican. So, even in a bright blue state such as, say, Maryland, there are a lot of red counties out there. It's because Democrats are not reaching out, they do not have the right message, and they don't even know how to send messages to small towns and rural America.

Both the Kerry campaign and the Media Fund, which is the principle outside, "independent" group on behalf of Democrats, aired virtually no radio commercials outside of African-American radio. The thing about it is, once you get out of cities and close-in suburbs, Americans pretty much live in their cars. Some of them even have trucks. They have radios in them things. If you want to reach them, chances are you

ought to do some radio, because that is where they are. The Bush campaign was airing ads that were in these places, in health clubs, for example. I've never been in one myself. While you are on your exercise bike or something called a stair master or something, they have commercials that are there while you are sitting on a treadmill or something. Wherever you were, if the Bush campaign thought there was the slightest chance of getting your vote, they were talking to you.

So, Democrats have some real soul searching to do in terms of what they are saying and what they need to say.

One last point about 2004. There is all this talk about what role values played. It was fascinating that, going into the 2000 election, if somebody had told me that George Bush or any Republican was going to carry heavily Democratic West Virginia, I would have assumed that the Republican was going to win the country in a landslide. George Bush did carry West Virginia, and this time he carried it by a bigger margin. Conversely, if somebody had told me 4 years ago that Al Gore was going to carry Montgomery, Bucks, and Delaware counties in Pennsylvania, three very Republican suburban counties right outside Philadelphia, I would have assumed that Gore or that Democrat was going to win the country in a landslide, if they are winning hardcore Republican counties. Not only did Al Gore carry them 4 years ago, John Kerry carried them by bigger margins this time.

What we are seeing is that social and cultural issues are playing more and more of a role in a partial realignment in this country. We are seeing Southern and Border State whites, white voters in small towns and rural America and to a certain extent downscale whites, moving away from the Democratic Party and more towards the Republican Party

because of abortion, guns, or even gay marriages now. But at the same time, what you are seeing is upscale white voters outside the South—particularly in the suburbs, closer in, typically not the really far-out exurbs—moving away from the Republican Party and more towards the Democratic Party on those very same issues.

Democrats are coming up a little on the short side because there are more of those folks down here than there are the other people up there. But, it is a simultaneous shift that is increasingly taking place that has absolutely nothing to do with income.

What are the next couple of years going to be like? I am a little skeptical that the next 2 years are going to be real different in terms of legislative output from before. The reason is this: first, the House, 3 seats changed out of 435, that's just not much of a shift. Republicans could get pretty much what they needed out of the House anyway, so that didn't really change. Now in the Senate, four seats is a whole lot. But, when you start taking it apart and say, okay, Republicans are starting off with 55 seats, then you start off with Lincoln Chafee from Rhode Island, who is what some conservatives derisively call a RINO—Republican In Name Only. Whether that is a fair characterization, you can argue about. But you have other moderates such as Susan Collins and Olympia Snowe from Maine, Arlen Specter from Pennsylvania. On tax and budget issues, George Voinovich is very much a deficit hog. There is only one honest-to-God conservative Democrat left in the U.S. Senate, and that is Ben Nelson from Nebraska. After that, you need to go over a little bit before you get to Blanche Lincoln from Arkansas, Mary Landrieu from Louisiana, Evan Bayh from Indiana, Bill Nelson from Florida. But the pool of conservative-moderate Democrats is just a lot smaller than it used to be. So when you start asking, “How many honest-to-gosh conservative votes are there in the U.S. Senate?”

you are at about fiftyish. It depends on the issue a little bit. This is something that goes largely unremarked, but Senator Bill Frist of Tennessee is certainly one of the most accomplished people I have ever met in my life. He is a brilliant heart surgeon from Vanderbilt and all that. But, he has been the Senate Majority Leader for only 2 years and is now a lame duck, having announced he was going to serve only two terms in the U.S. Senate. So he is leaving the U.S. Senate after the next election. A lame duck, fairly junior leader with a very tenuous ideological majority in a completely acrimonious and bitter environment—explain to me how a lot is coming through that Senate. It is not clear to me. So while it was a big jump for Republicans, it may be a 3/3 seat net shift to the right, but there are not 55 and there sure as hell aren't 60 conservative or reliably Republican votes on every single issue.

One very final point. Second-term, mid-term elections are really ugly for the party holding the White House. Look back to 1958 with Eisenhower as President, when Republicans lost 48 seats in the House and 13 in the Senate. The next one was 1966, with Kennedy and Johnson, when Democrats lost 47 seats in the House and 4 in the Senate. In 1974, the next one, Nixon and Ford, Republicans lost 49 seats in the House and 4 in the Senate. The next one was 1986, with Ronald Reagan, when Republicans lost only five seats in the House, but eight seats in and control of the Senate.

Finally, the one time that the party holding the White House did not take a bath in a second-term, mid-term election was Bill Clinton in 1998, when Democrats actually picked up five seats and broke even in the Senate. But, there was this little thing called impeachment going on that kind of changed the natural order of things. Don't get me wrong, I am not suggesting for a second that the American people have marked on their

kitchen calendars all over America, “Oops, it’s the first Tuesday after the first Monday of November of the sixth year of the party of an all-new White House, time to kick the heck out of the President’s party.” That is ridiculous. But, history tells us that in four out of the five of these kinds of elections since the end of World War II, bad things have happened to the party holding the White House. Typically they goosed the economy up during the election year, so there has been a little bit of a sag afterwards. They tend to lose energy, lose focus, run out of gas, run out of new ideas, get arrogant, scandals start hitting. But four out of five is a pretty high correlation.

So my advice is, every month or two pretend, you are a turtle and stick your head out, look around, and ask yourself this question: ”Are any of the situations that contributed to the party holding the White House getting hammered in the sixth-year, second-term, mid-term election, do any of these circumstances exist?” If the answer is no, then go back to your work, go back to your business. But, if the answer is yes or maybe, stick your antenna up a little higher and pay attention, because four out of five is a pretty big number.

Thank you all very much. This has been a real honor to speak with you.

Questions and Answers

Vernon Jordan: What will it take for *The Washington Post* to endorse a Republican candidate for President?

Charlie Cook: Wow! I don't know how much it would say about the Republican or how much it would say about the Democrat running against him. Last time I checked, I thought *The Washington Post* was pretty supportive of the President on the war, and it has taken a lot less heat than a certain other national newspaper. I don't think I want to answer that one. It certainly is an interesting one, but I see the *Post* endorsing a Republican every once in awhile. More than *The Washington Times* does Democrats.

Vernon Jordan: Where is the Hispanic vote going in the future?

Charlie Cook: Great question! I try to avoid using the term Hispanic vote because I think that there is not a Hispanic vote. There is a Mexican-American vote. There is a Cuban vote. There is a Dominican vote. Take the Cuban vote, it is heavily Republican. Now, Cubans who came to the U.S. prior to the revolution tend to be more conservative Democrats who live more towards Tampa, while ones who came during and after the revolution tend to be far more Republican and live more towards Miami. The Cuban vote is obviously very Republican. You look on the other end. Look at the Puerto Rican vote: just incredibly Democratic, and there is no indication from the research that as Puerto Rican incomes go up, their willingness to vote Republican goes up. On the other hand, in the biggest group, the Mexican-American vote, there is clear evidence that as Mexican-American incomes rise, their willingness to vote Republican rises. I would argue that that's the critical vote to watch.

There is some dispute over whether President Bush got 44% or 40% or whatever of the Hispanic vote nationwide. But this is something to watch in the future, because if Republicans are going to remain a majority party, they need to continue to do well with Mexican-American voters, as well as President Bush did this time. That is the key vote.

Vernon Jordan: Looking back, would Howard Dean have done better than Kerry?

Charlie Cook: On paper, someone who is one of the most moderate Governors in the country, who had the record that Governor Dean did, and who had a message that this war is a mistake and we've screwed it up to boot—on paper, that candidate could have won this election. Whether Howard Dean himself could have won, that's interesting, because I am not sure that he would have carried it out. On paper, Dean could have done it. But in practice I am skeptical whether he or his campaign would have been successful. His campaign was guilty of malpractice for allowing the war to define him, actually one of the more moderate Governors in the country, so they screwed that up pretty badly.

Vernon Jordan: From both sides of the aisle, whom would you bet on in 2008?

Charlie Cook: Only a fool would predict anything about 2008. It is going to be like a Cecil B. DeMille production on both sides. Let me just throw out some names. On the Republican side, from right to left, Senator Rick Santorum From Pennsylvania, Senator George Allen of Virginia, Governor Haley Barber of Mississippi. I don't think he'll run but, Governor Jeb Bush of Florida, Senator Bill Frist of Tennessee, Governor Bill Owens

of Colorado, Senator Chuck Hagel of Nebraska or John McCain of Arizona, Mit Romey of Massachusetts, Governor Pataki, Mayor Guilianni, a cast of thousands.

Then you look over at the Democratic side and you see Mark Warner of Virginia, Evan Bayh, Governor Bill Richardson, Tom Vilsack, John Edwards, John Kerry, and Hilary Clinton. Just casts of thousands on both sides. Hilary Clinton starts off as a front runner for the Democratic nomination, but one of the byproducts of this intense polarization, this bitterness we have, is that electability, something that has never been important before, has suddenly become so much more important. I just wonder whether you are going to have a lot of liberals, a lot of Democrats, who will be thinking in 2008, “Gosh I would love to see Senator Clinton win. God, that would be great, she’d be fabulous, but somebody told me that not everybody likes her. I really, really want a win.” So, I think there is a push-pull on electibility that is very real there, as Democrats will have been out for 8 years.

Charlie Cook is Editor and Publisher of *The Cook Political Report*, and a political analyst for the National Journal Group, where he writes weekly for *National Journal* magazine and *CongressDailyAM*. He is an analyst for *NBC News* as well as well as *CNBC* and *MSNBC*, appearing regularly on *CNBC’s* evening program, *Capitol Report*. As one of the most sought-after political experts, Mr. Cook has appeared on all the major network news shows, including *NBC’s Meet the Press*, *ABC’s This Week* and *Nightline*, *CBS Evening News with Dan Rather*, and *PBS NewsHour with Jim Lehrer*.