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UPDATED Dec. 23, 2020

America Decided… America's Divided






Everything Changed and Nothing Changed

MEHLMAN CASTAGNETTI
ROSEN & THOMAS

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MAIN TAKEAWAYS

- **Voters wanted more competent but also more moderate leadership:**
  - Trump lost for failing to manage COVID competently & excessive chaos / division
  - House Democrats lost where voters feared overly-aggressive Progressivism

- **Our nation remains narrowly & deeply divided:**
  - Senate & House nearly tied, key EC states close, minimal state-gov't change
  - Biden had no coattails, enters with a narrower mandate… manage COVID & lower the volume… his ability to do more will depend on his success managing the pandemic

- **The big questions remain mostly unresolved:**
  - Both parties face huge internal battles over future direction & leadership
    - Biden is a transitional leader, not the future of the Democratic Party
    - Trump is out but hardly gone
  - Big policy directional questions were deferred (climate, inequality, immigration, systemic racism, etc.)

THE RESULTS: A SPLIT DECISION

Democrats Capture the White House & Gain in the Senate
Republicans Gain in the House & States



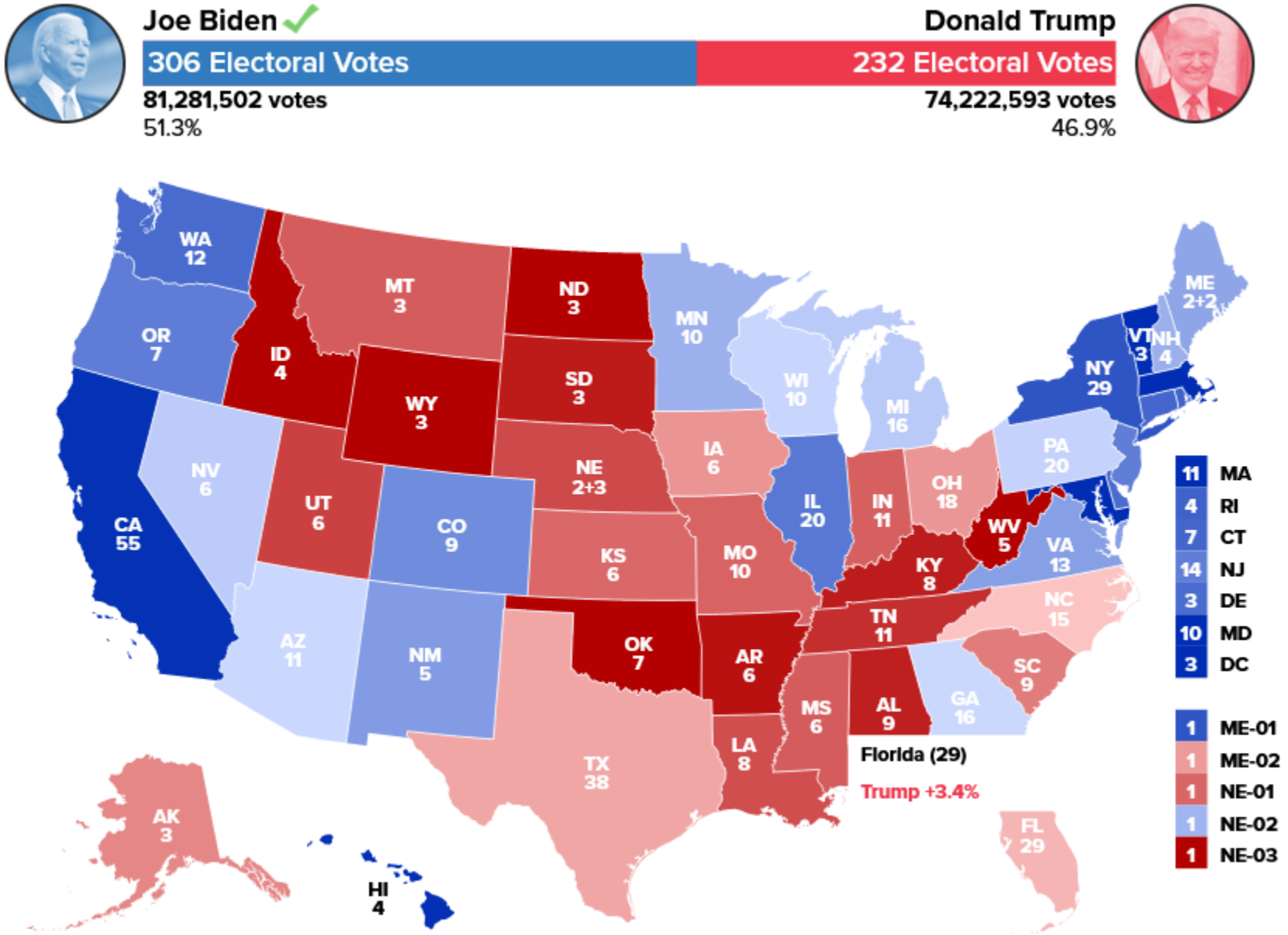




	WHITE HOUSE	U.S. SENATE	U.S. HOUSE	STATE LEG. CHAMBERS	GOVS
LAST ELECTION	Republican	53R – 47D	235D – 199R	59R – 39D	26R – 24D
AFTER *(So Far)*	**Democratic**	**50R* – 48D**	**222D – 213R**	**61R – 37D**	**27R – 23D**
NET GAIN	**FLIP**	**D+1**	**R+14****	**R+2**	**R+1**

Sources: NCSL; * 2 Senate runoffs in GA 1/5/21; ** several races not yet called

BIDEN WINS POPULAR VOTE, ELECTORAL COLLEGE



https://cookpolitical.com/2020-national-popular-vote-tracker

10 LESSONS FROM 2020:
What the Elections Say About the Nation & the Future

#1. HISTORIC ENGAGEMENT

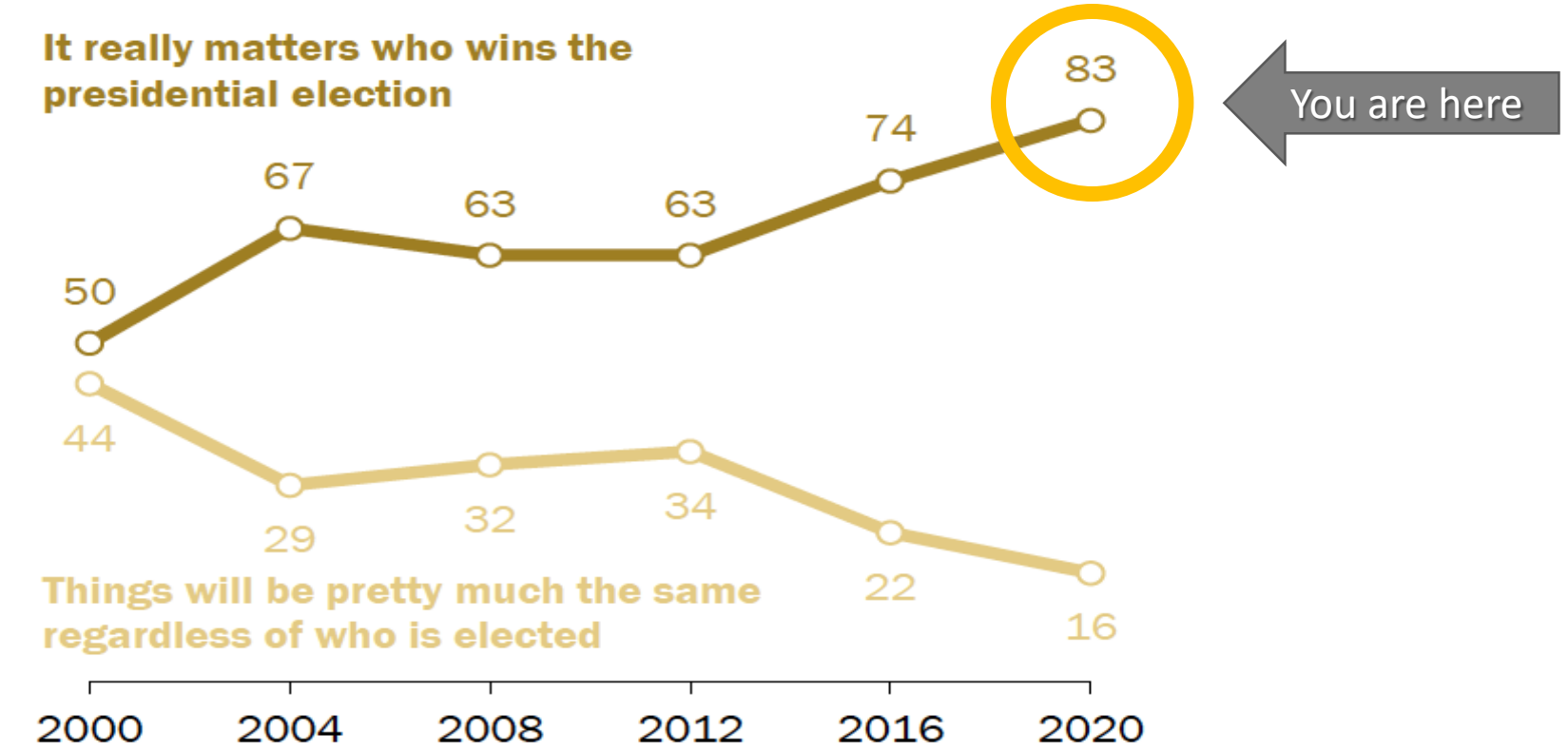
Americans Remain Eager to Protest, March & Vote in an Age of Hyper-Activism

AMERICANS BELIEVED “IT REALLY MATTERS WHO WINS”





% of registered voters who say …

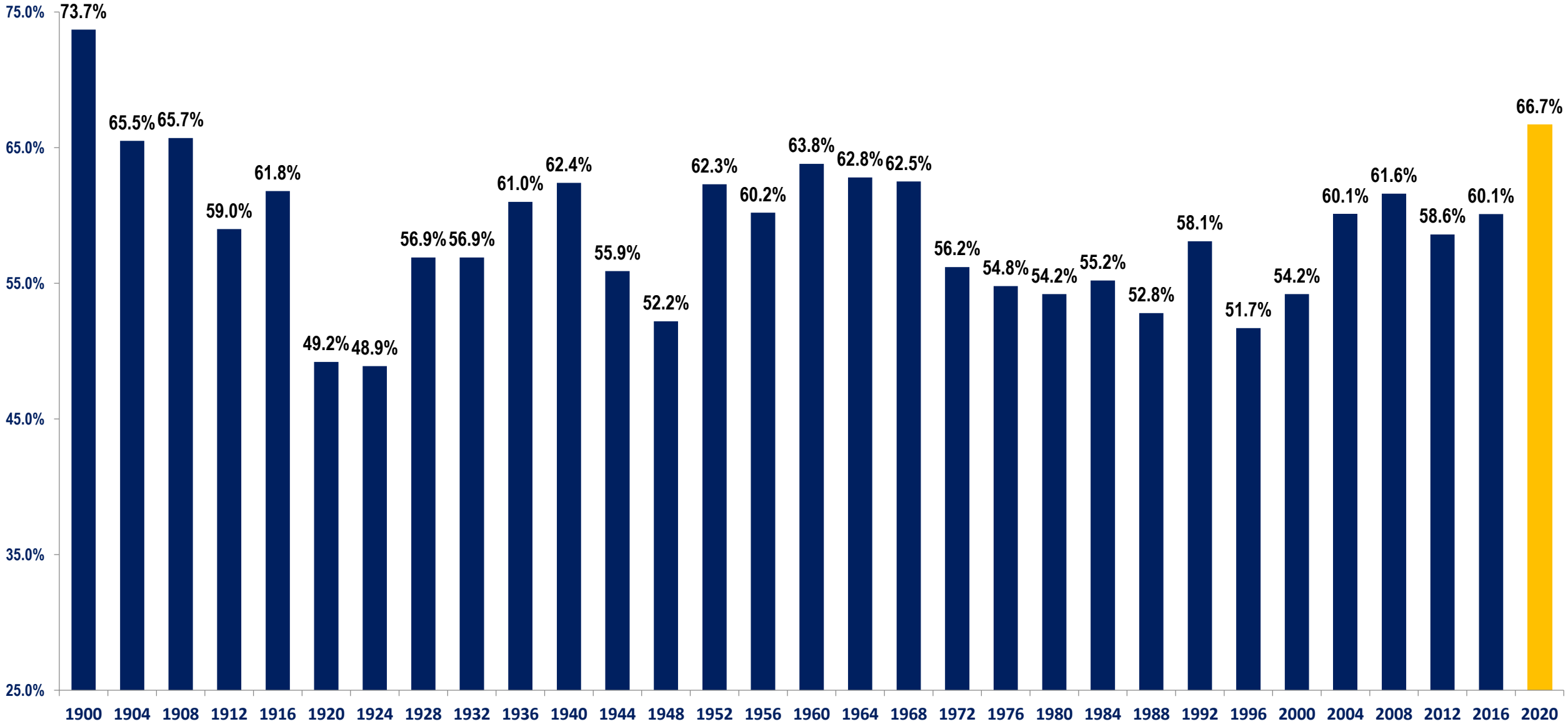


Notes: Based on registered voters. Volunteered and don’t know responses not shown. Data for prior years from June surveys.
Source: Telephone survey of U.S. adults conducted July 23-Aug. 4, 2020.

PEW RESEARCH CENTER

HIGHEST VOTER TURNOUT SINCE 1900

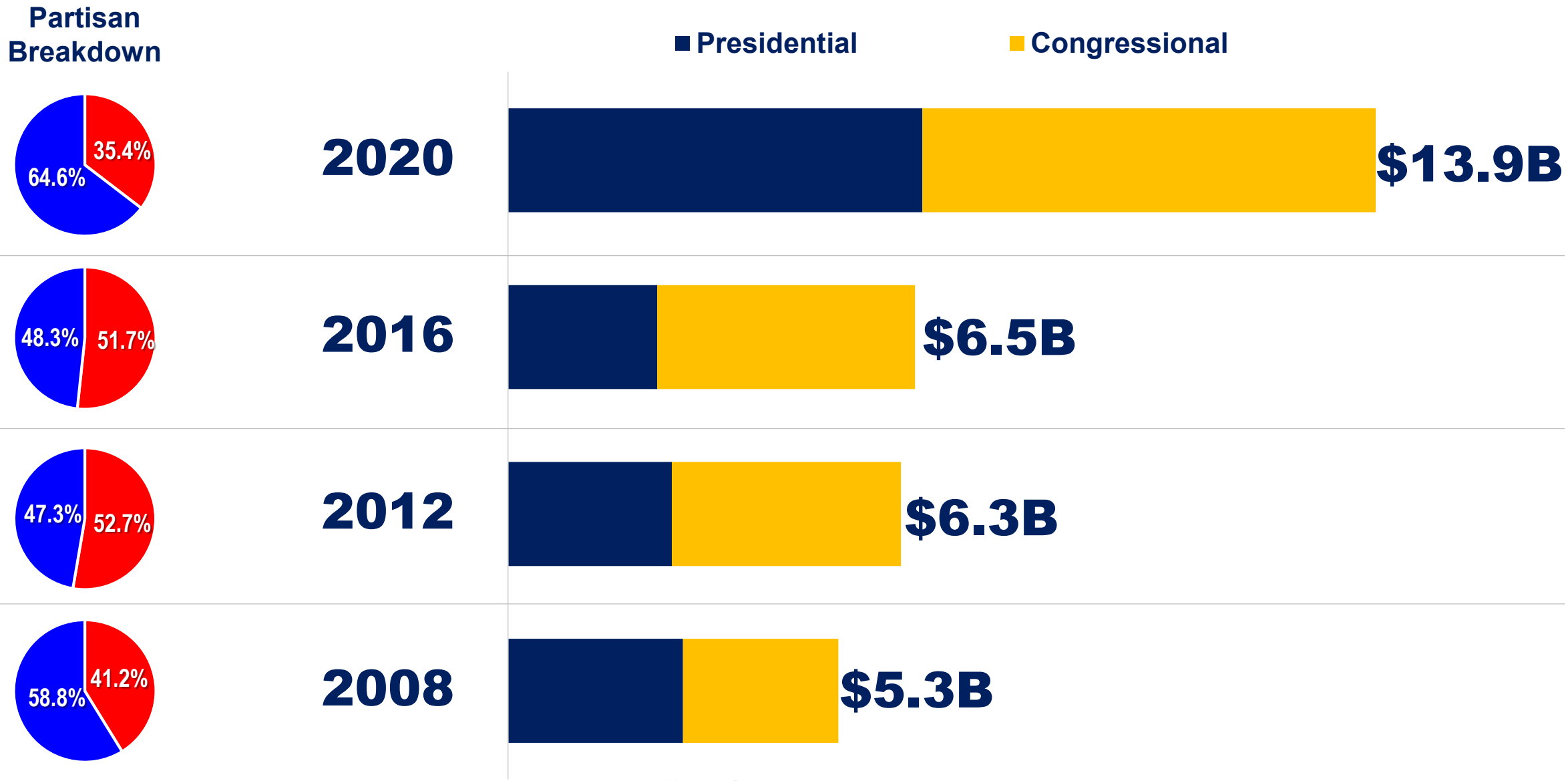
U.S. Voter Turnout as % of Eligible Voters



Source: US Election Project (12/7)

SPENDING ON THE 2020 ELECTIONS CRUSHED ALL PRIOR RECORDS

Total Election Spending (Open Secrets)



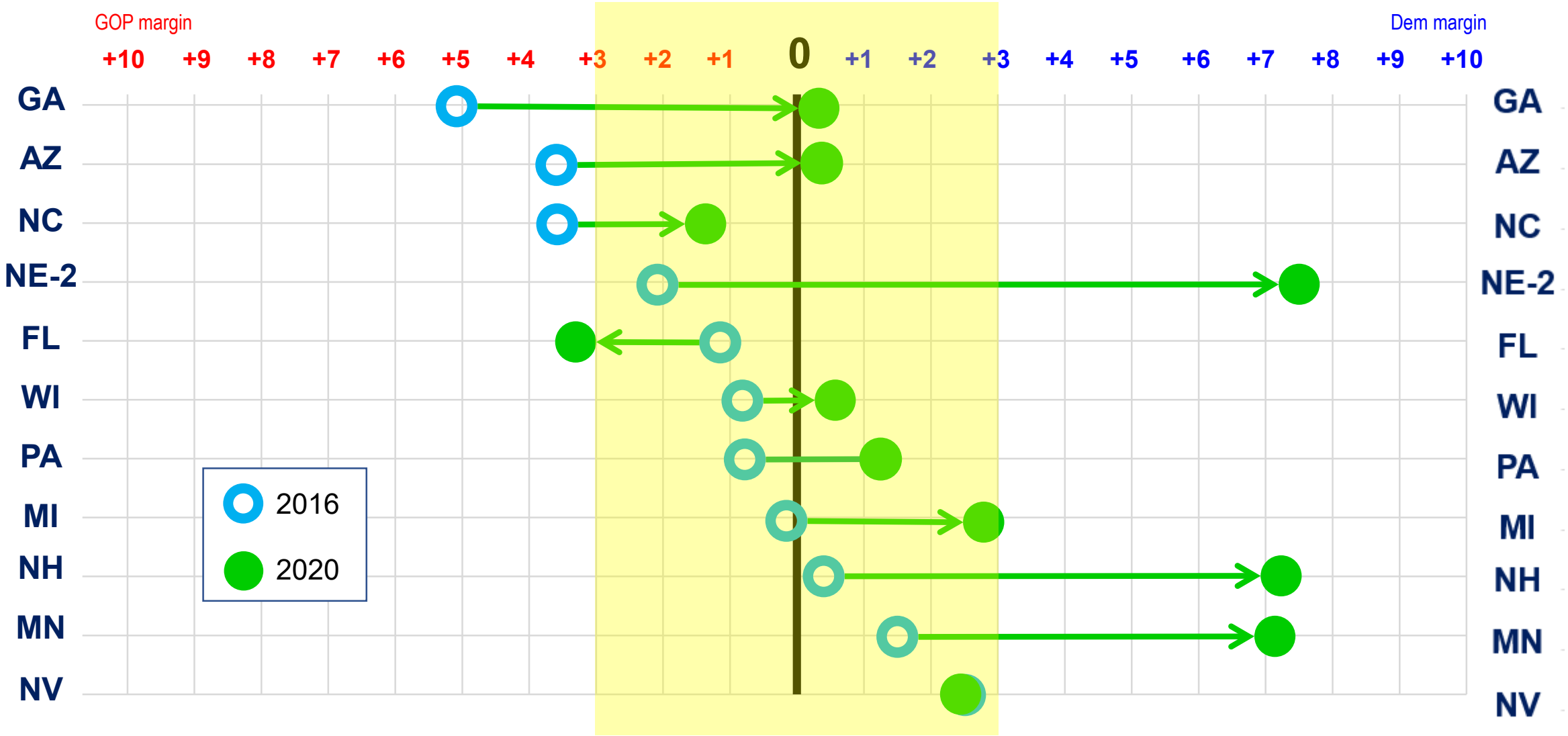
Sources: Open Secrets

#2. VERY CLOSE OUTCOME

American Politics Remain Closely Divided, No Breakthroughs in 2020

THE BATTLEGROUNDS: CRITICAL STATES SHIFTED JUST ENOUGH

Seven States Within 3% Margin in 2020, Eight in 2016



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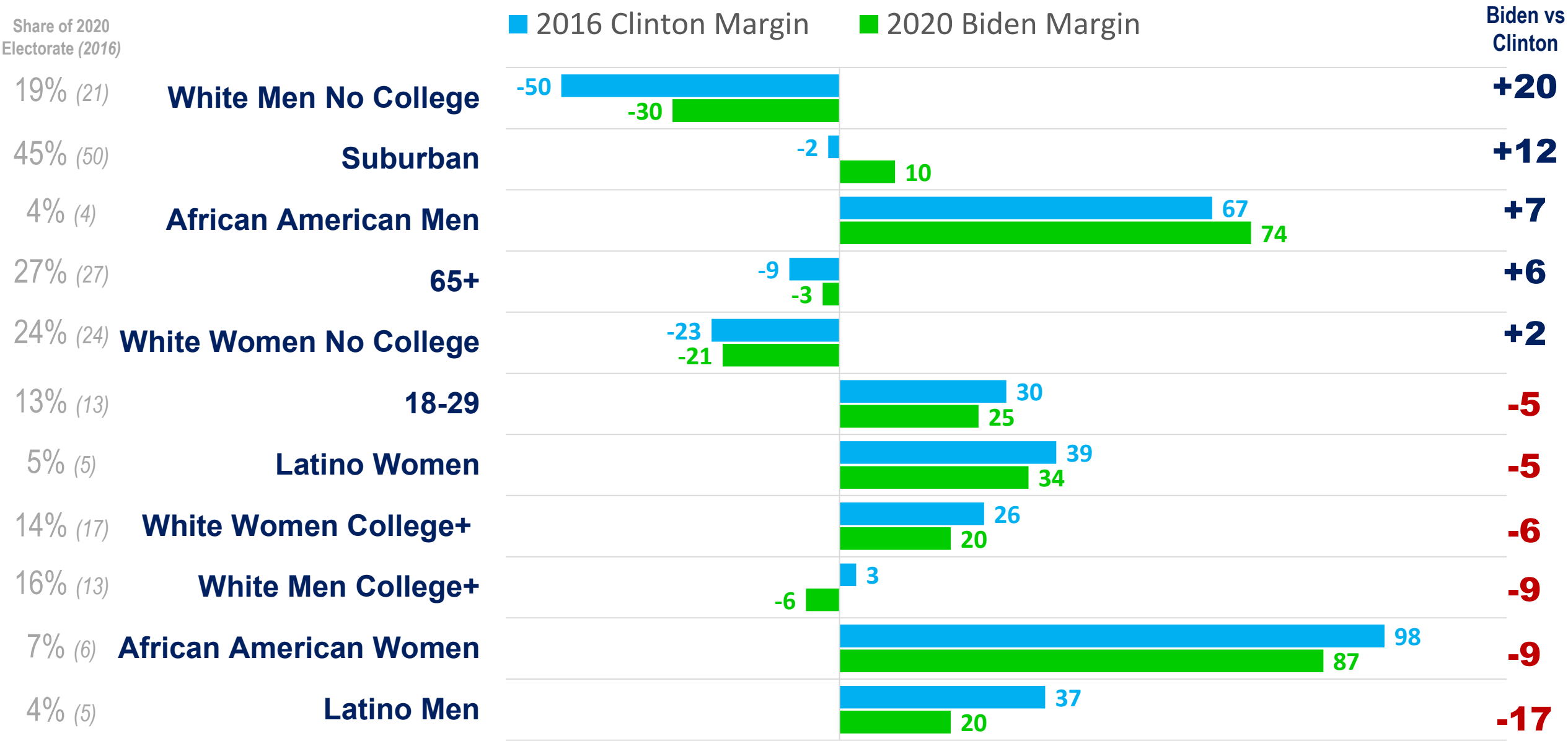
FEWER VOTES DECIDED ELECTORAL COLLEGE IN 2020 THAN 2016

While the Popular Vote Margin Grew from 3M+ (Clinton) to 7M+ (Biden), The Margin in Decisive Electoral States Remained Tight



Source: NBC

BIDEN CUT INTO TRUMP'S COALITION, TRUMP INTO CLINTON'S



Sources: 2016 Pew Validated Voters; 2020 AP Votecast Exit Polls

#3. NO COATTAILS

Americans Chose Divided Government & A Narrow Mandate for 46

ELECTORATES SEEKING MAJOR CHANGE SHOW IT DOWNBALLOT

Coattails for Presidents With Big Messes to Clean Up

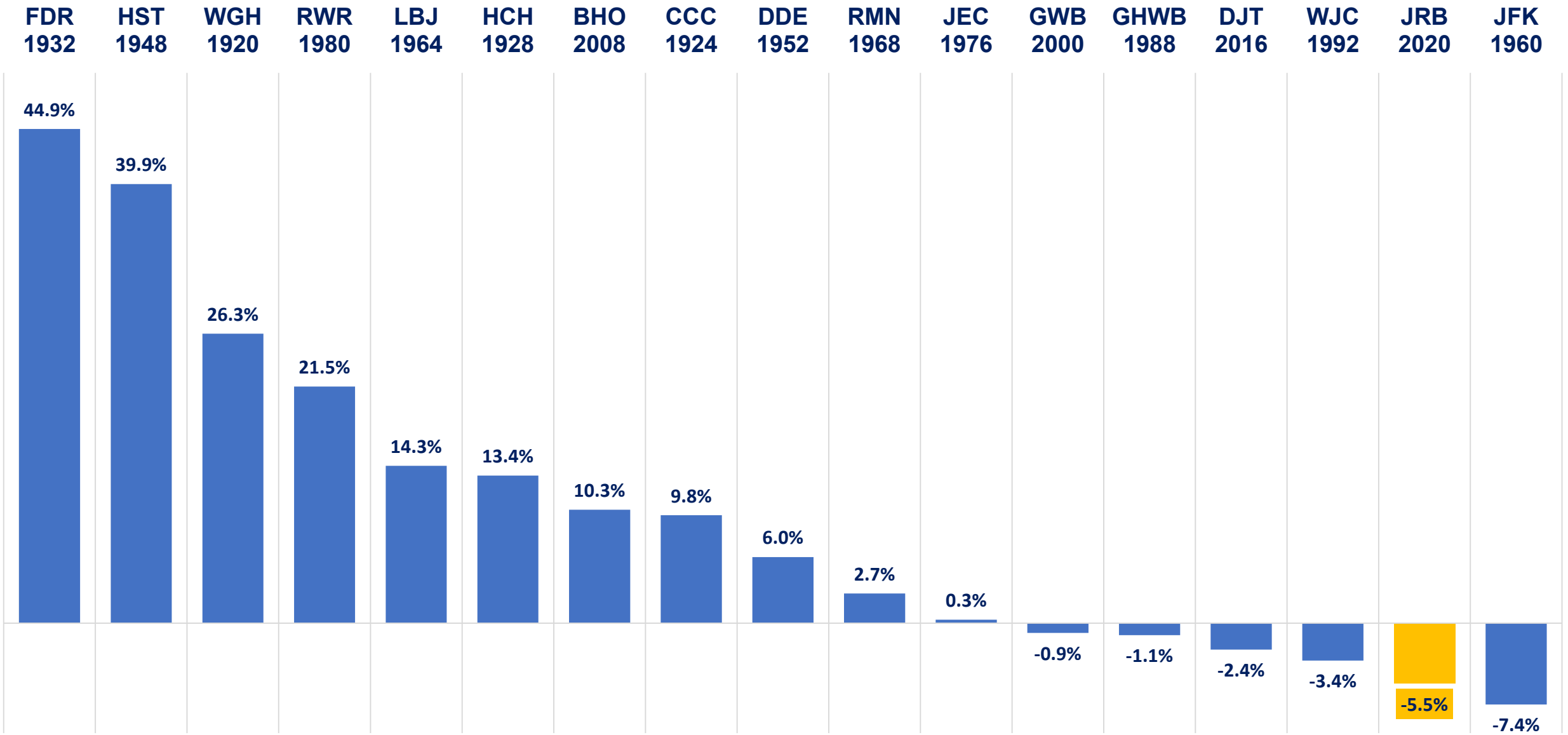
YEAR / PRESIDENT	Popular Vote	Senate Seats	House Seats	Governors
2008 / OBAMA	+7.27%	+8	+21	+1
1980 / REAGAN	+9.74%	+12	+34	+4
1932 / FDR	+17.8%	+11	+97	+11
1920 / HARDING	+26.2%	+10	+63	+7
1860 / LINCOLN	+10.13%	+2 (of 66)	+30**	
2020 / BIDEN	+4.4%	+1***	-14	-1

*** Pending GA runoff elections*

**** +30 for the Unionists*

WEAKEST HOUSE COATTAILS SINCE 1960

Change in President's Party Share of House Seats at First Election

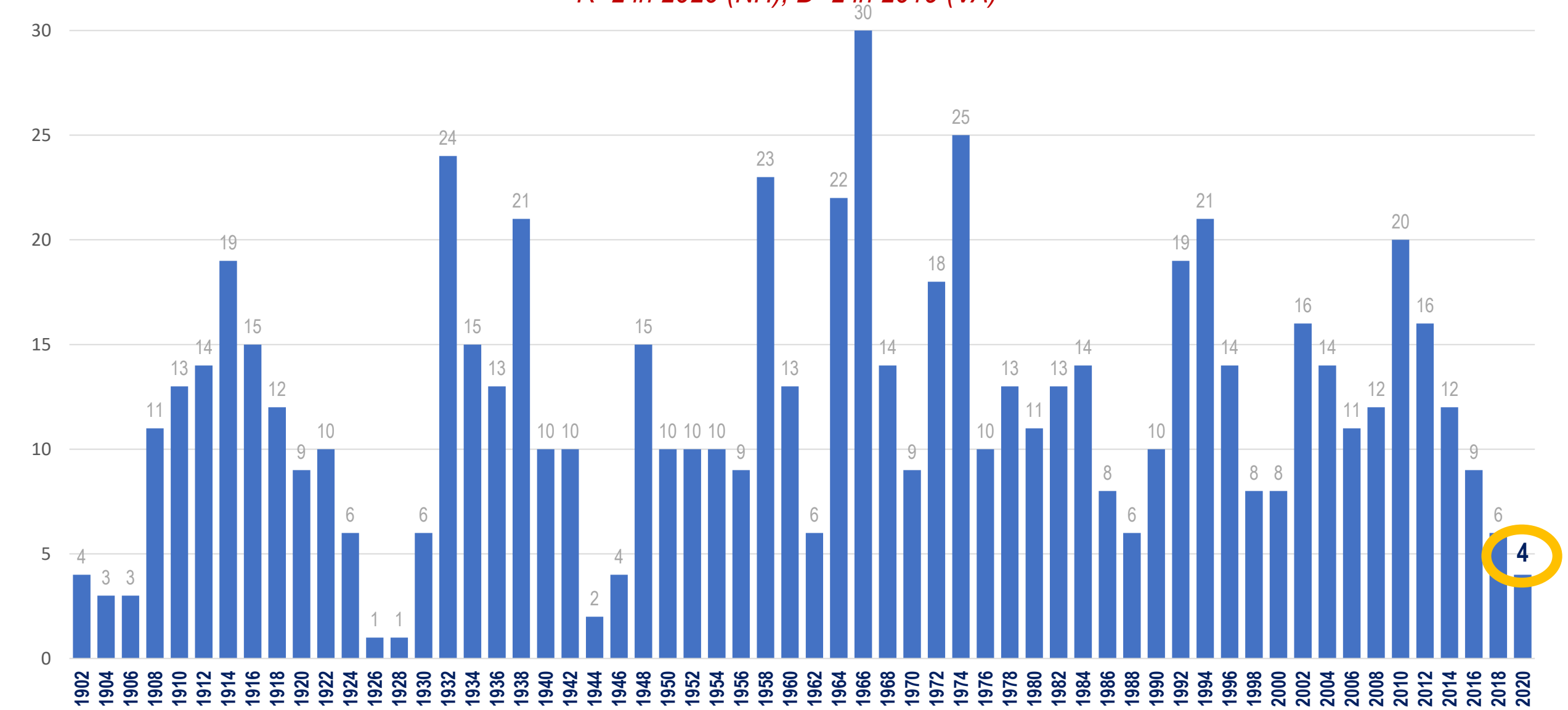


Source: Author's calculations **assuming Dems have 222 seats** in 117th Congress

IN THE STATES: A "NO CHANGE" ELECTION (GOP +2)

Fewest Legislative Chamber Switches Since 1946

R+2 in 2020 (NH), D+2 in 2019 (VA)



Sources: NCSL, Tim Storey

#4. VOTERS HISTORICALLY DISRUPTED

Focused on COVID & ECONOMY…

Sought Competence > Change

MOST DISRUPTED ELECTORATE SINCE 1968

In the 31 Presidential Election Years Since 1900…











11 **9** **8** **6** **2**

Years with **Two** Super-Disruptors: **1972, 2004**

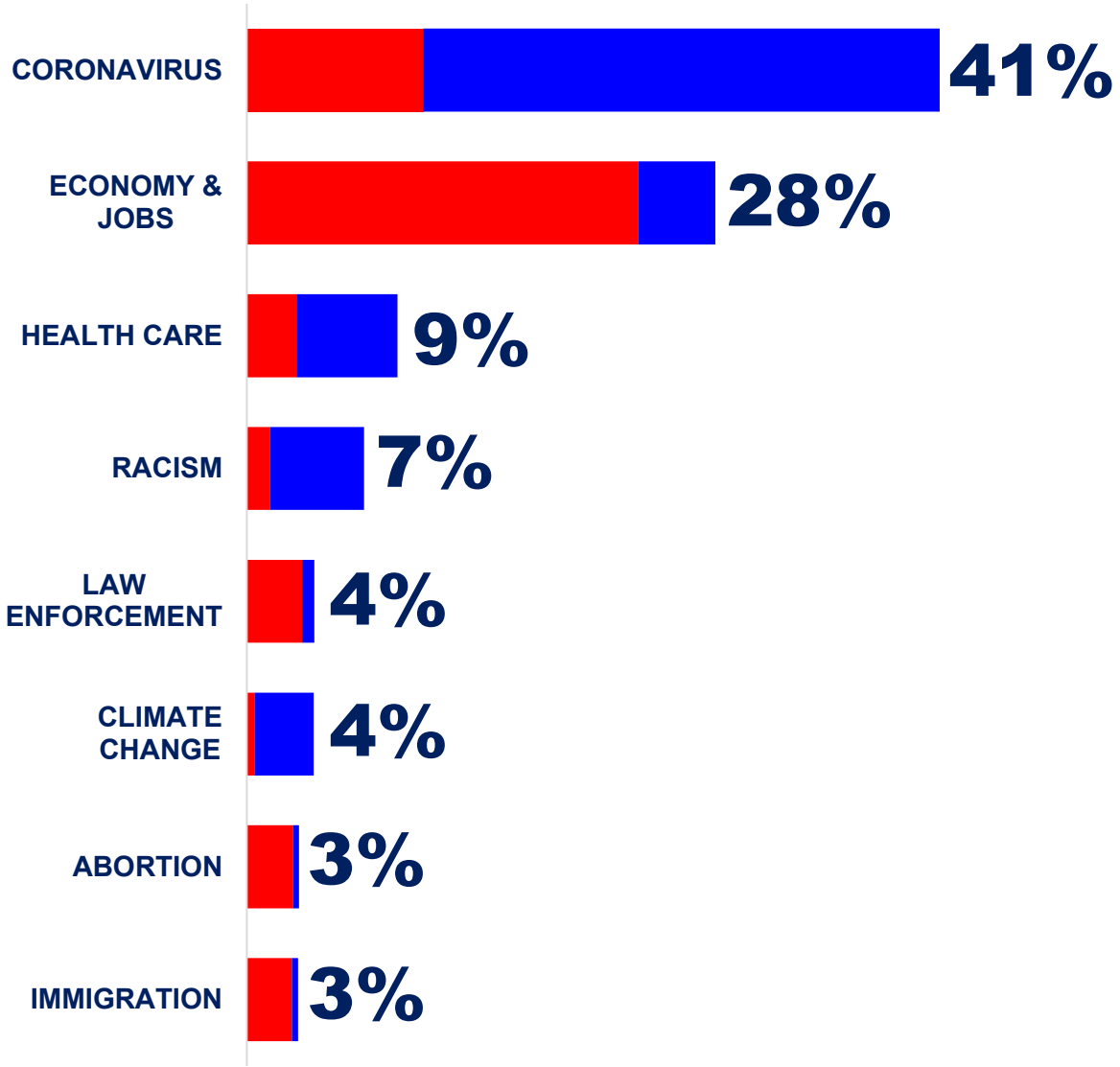
Years with **Three** Super-Disruptors: **1932, 2008**

Years with **Four** Super-Disruptors: **1968, 2020**

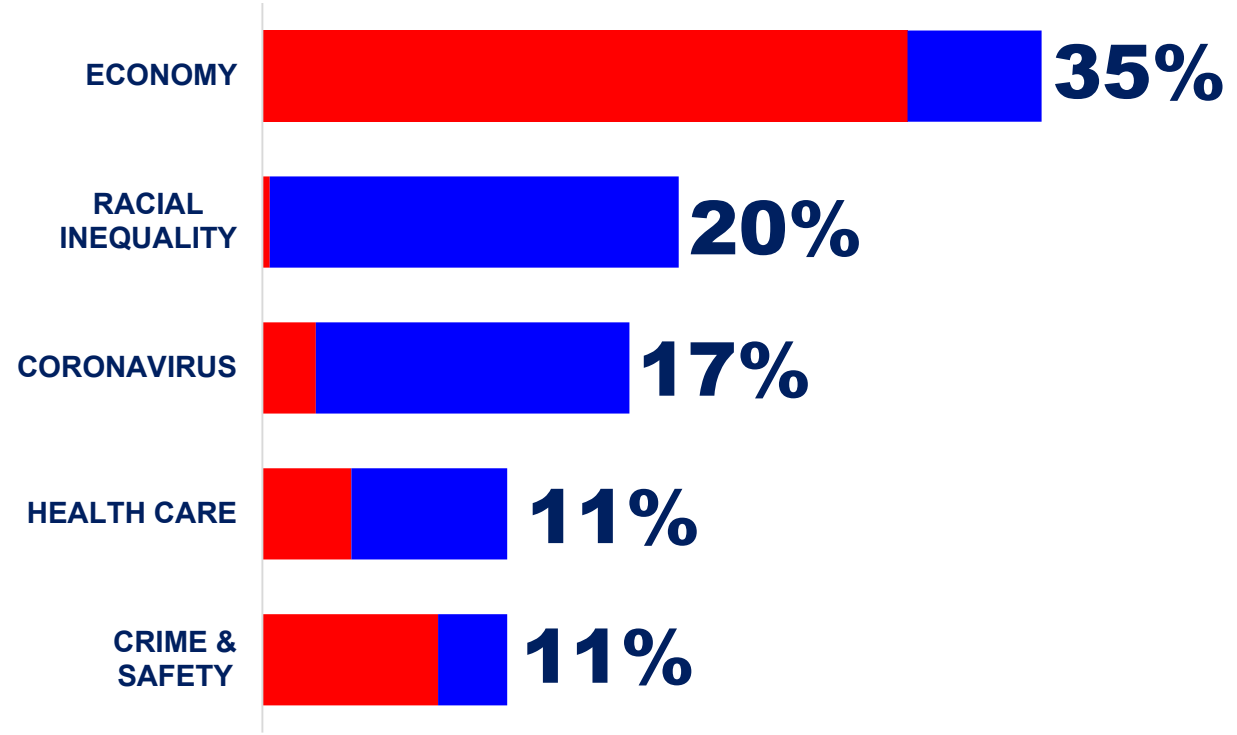
White House Changed Parties

THE ISSUES: COVID & THE ECONOMY

Most Important Issue Facing the Country



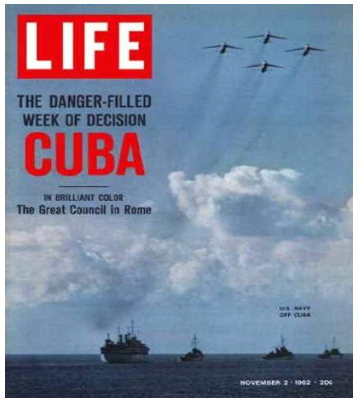
Most Important Issue to Your Vote



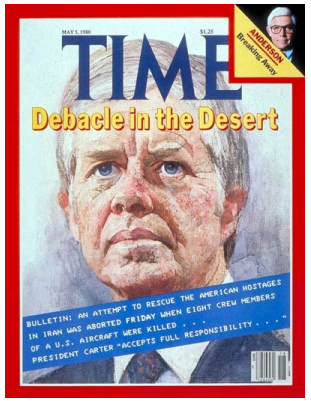
Source: AP Votecast (Country); Edison Research (Your Vote)

THE ADMINISTRATION'S POOR PANDEMIC RESPONSE SUNK THE PRESIDENT

Crises Define Leaders







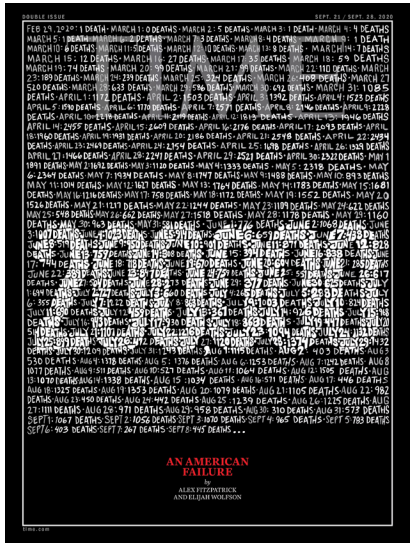






55% disapproved of Pres. Trump's handling of the coronavirus (47% strongly)

83% said the fed'l government's response to the coronavirus was an **important factor** in their vote (**39%** single most important factor)



Source: AP Votecast

PANDEMIC PERCEPTIONS TURNED HEAVILY ON MEDIA PREFERENCES

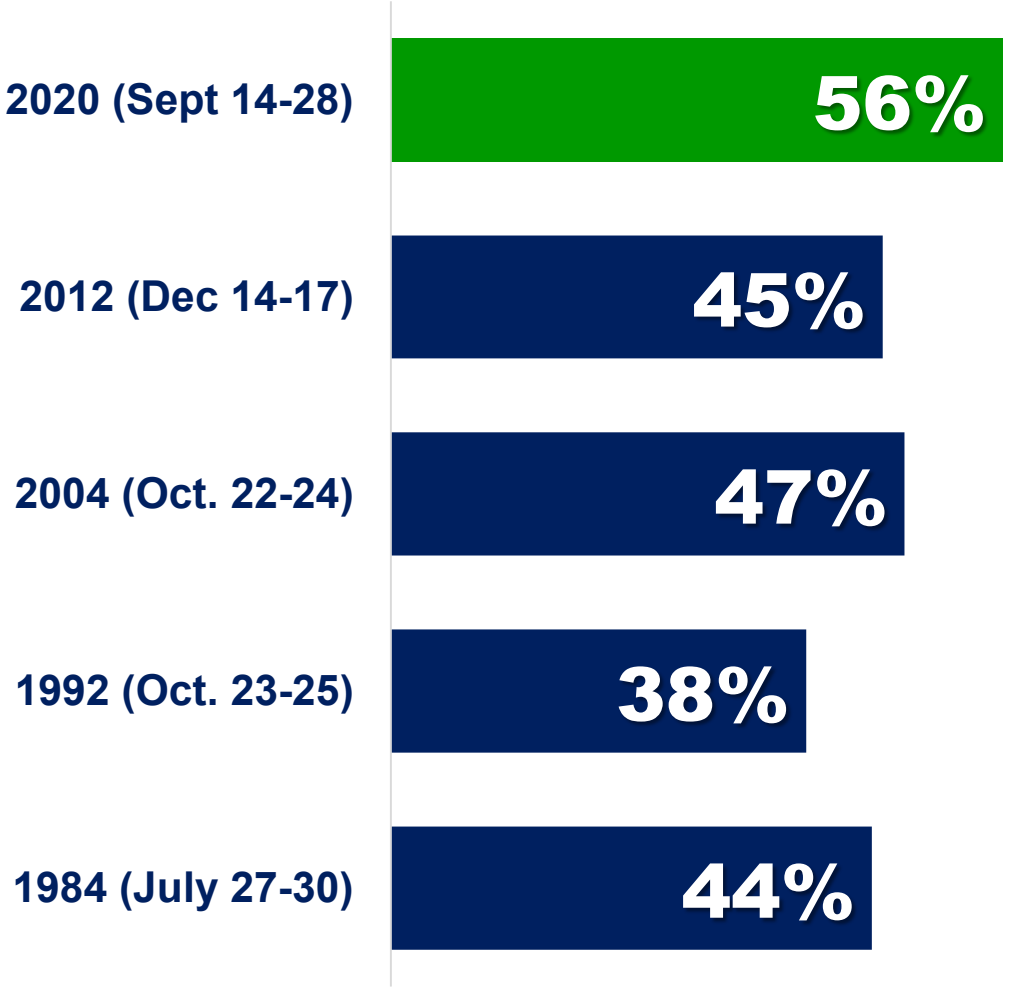
Media Diets Massively Shaped Perceived Pandemic Reality

	"The U.S. has controlled the outbreak as much as it could"	*"The U.S. has not controlled the outbreak as much as it could"*
If your only news comes from: FOX NEWS Channel, ON AIR	90	9
If your only news comes from: MSNBC, CNN, npr	3	97

Source: Pew Research, Oct. 7, 2020

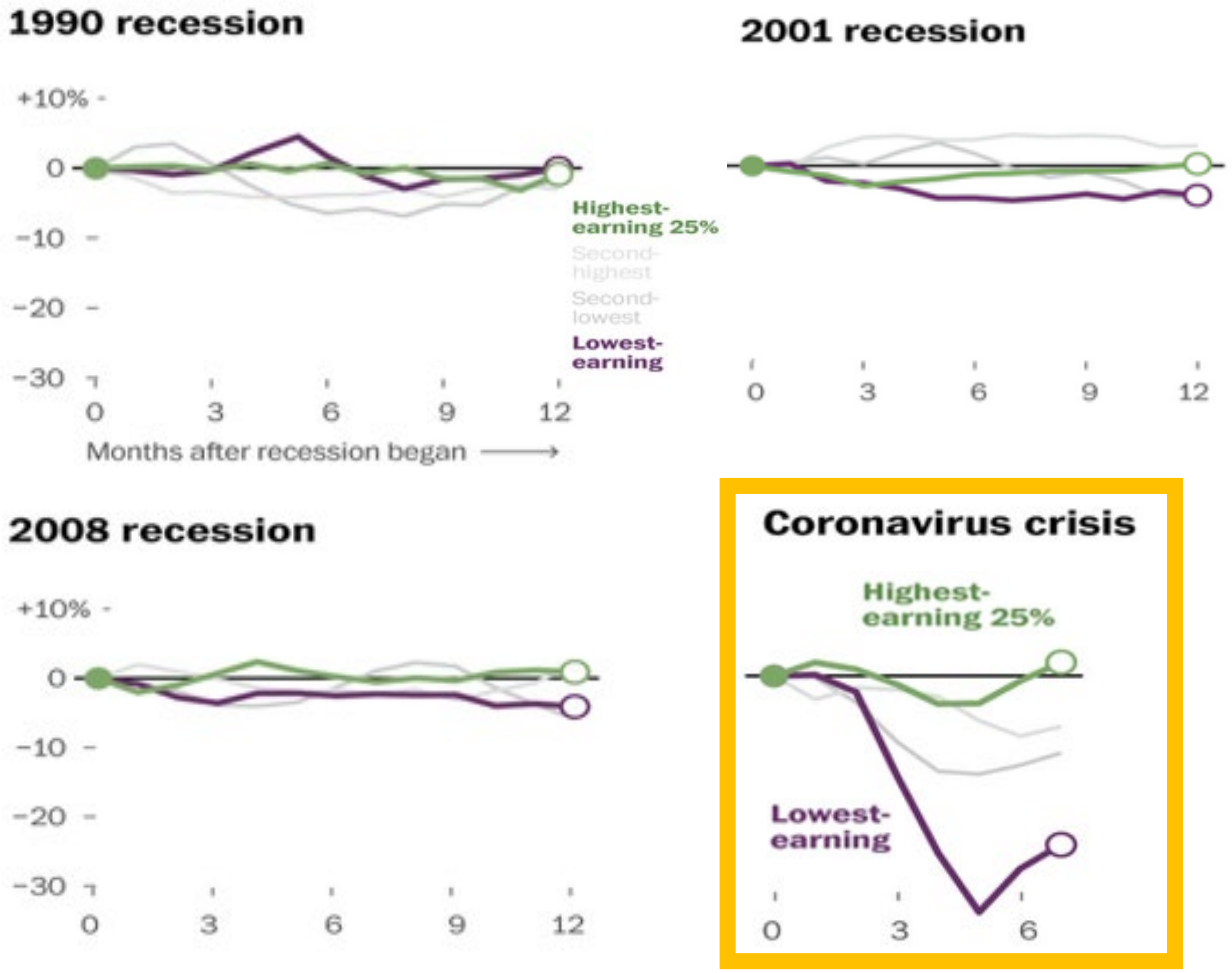
ECONOMIC REALITIES SHAPED PERCEPTIONS

Are You Better Off Today Than You Were Four Years Ago?



Americans Face Two Very Different Recessions

Job growth (or loss) since each recession began, based on weekly earnings



Source: Gallup; Washington Post

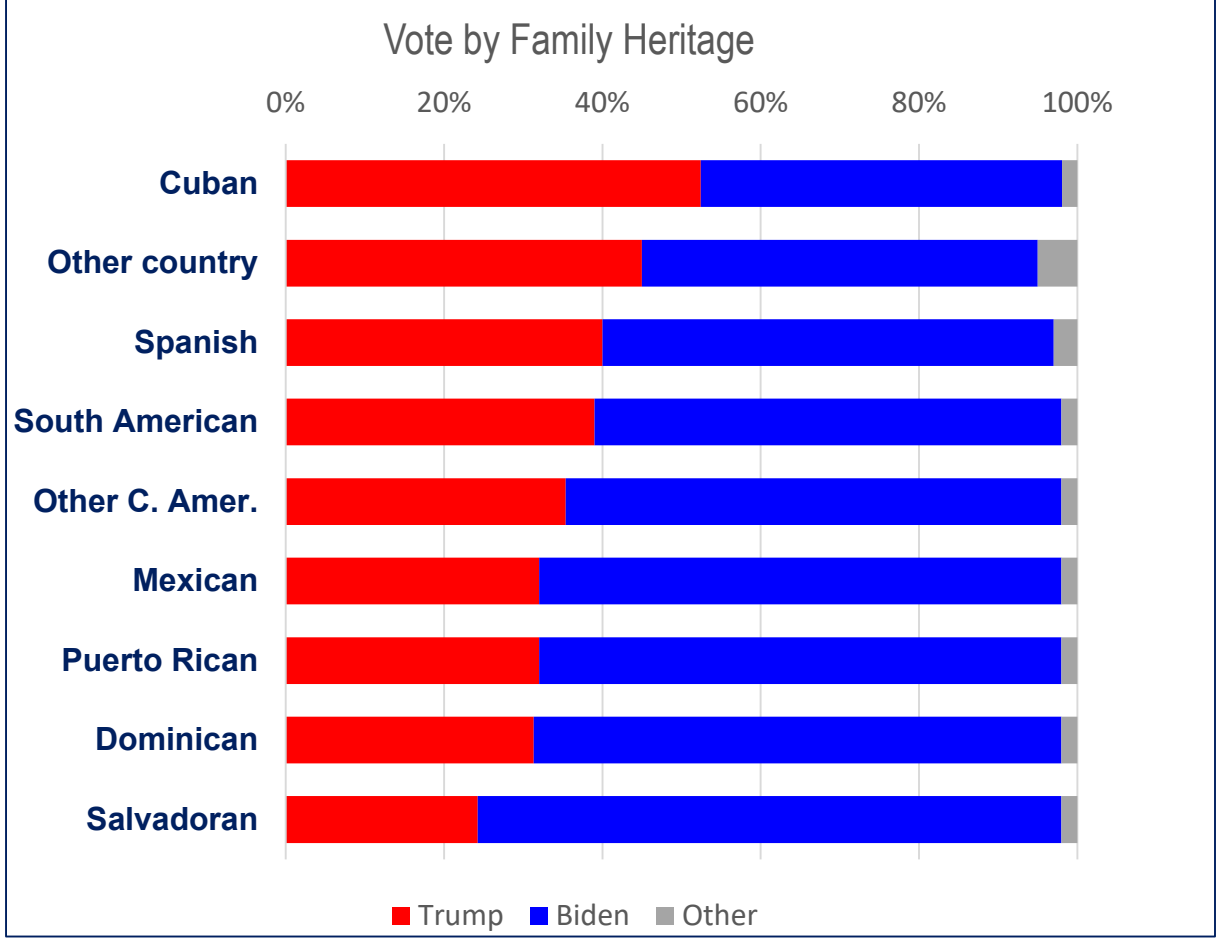
#5. THE ELECTORATE IS NOT MONOLITHIC

You Won't Bring All Americans Together Until You Understand Them

DIVERSE AMERICANS ARE NOT MONOLITHIC

Appeal to Them As Individuals

There is no "Hispanic Vote"… There Are Many



Immigration & Civil Rights Matter Greatly, But Other Issues Matter Too

Top Issues for Americans of Color (American Election Eve poll)

LATINO	BLACK	ASIAN
Coronavirus pandemic **(55%)**	Coronavirus pandemic **(55%)**	Coronavirus pandemic **(58%)**
Jobs & the Economy **(41%)**	Racial Justice **(37%)**	Jobs & the Economy **(44%)**
Health care costs **(32%)**	Jobs & the Economy **(34%)**	Health care costs **(37%)**

Sources: AP Votecast per WSJ; American Election Eve poll

THERE'S A SIGNAL IN THE NOISE: MIND THE DISRUPTION

Why Did >73M Americans Vote to Reelect Donald Trump?

(Most are not deplorable racists brainwashed by Fox News & Facebook friends)



Concern that Globalization Harms > Helps

Many Americans bemoan the "hollowing out of the middle class" as businesses outsourced >2M U.S. manufacturing jobs to China & low wage nations via "free trade"



Fear the New Economy Is Leaving them Behind

Many Americans feel disrupted by the knowledge economy; they see their "fly-over states" getting left behind by the "super star" technology and investment elites on the Coasts



Anger at "Political Correctness" / Elite Condescension

Many Americans feel under attack for being proud of their country & lifestyles (God, guns & football) and resent "elitist" condescension by the media and liberal politicians



Profound Disagreement with "Socialism"

Many Americans strongly disagree with the policies offered by some on the Left (e.g. defunding the police, decriminalizing the border, ending fossil fuels, higher taxes)

STATE'S SCIENCE & TECH LEADERSHIP HIGHLY PREDICTIVE

21 of Top 25 States for Biden

STATE TECHNOLOGY AND SCIENCE INDEX

MILKEN INSTITUTE

Overall Rankings

2020

21 of Bottom 25 States for Trump

RANK	STATE	RANK	STATE
1	Massachusetts	11	Minnesota
2	Colorado	12	Connecticut
3	California	13	Pennsylvania
4	Maryland	14	New Jersey
5	Washington	15	N. Carolina
6	Utah	16	Texas
7	New Hampshire	17	Arizona
8	Virginia	18	New Mexico
9	Delaware	19	Michigan
10	Oregon	20	Illinois
21	New York		
22	Georgia		
23	Rhode Island		
24	Ohio		
25	Wisconsin		

RANK	STATE	RANK	STATE
26	Idaho	36	Alaska
27	Indiana	37	Hawaii
28	Vermont	38	Nebraska
29	Montana	39	Wyoming
30	Kansas	40	Tennessee
31	Missouri	41	North Dakota
32	Alabama	42	South Dakota
33	Florida	43	Maine
34	Iowa	44	Kentucky
35	S. Carolina	45	Oklahoma
46	Nevada		
47	Louisiana		
48	Arkansas		
49	West Virginia		
50	Mississippi		

Won by Biden

Won by Trump

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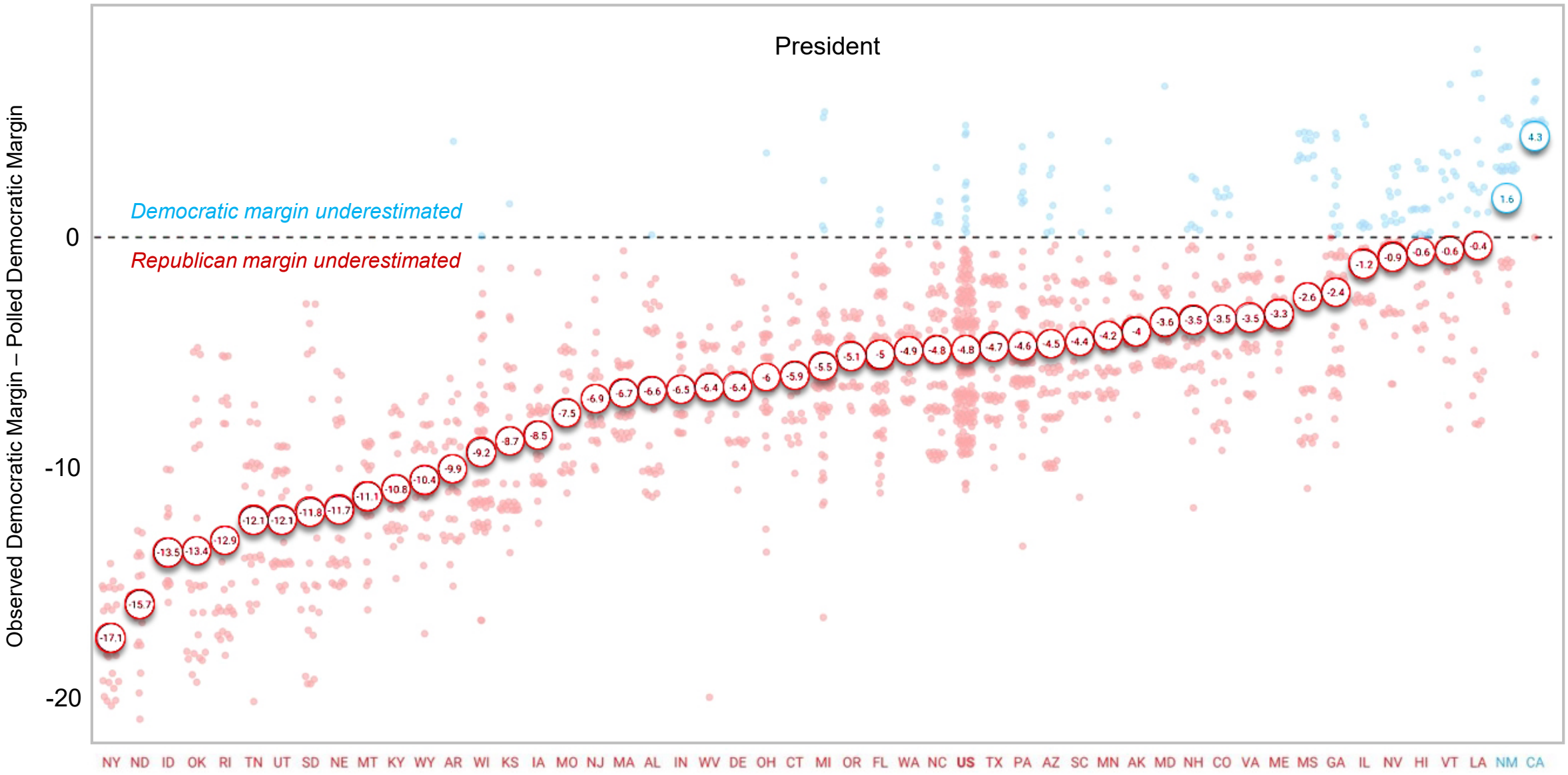
#6. ANOTHER POLLING FAIL

We're Flying Blind: Pre- and Post-Election Misses

(How will you reach stakeholders if you don't know who they are or where they stand?)

PRE-ELECTION POLLS SIGNIFICANTLY UNDER-COUNTED TRUMP SUPPORT

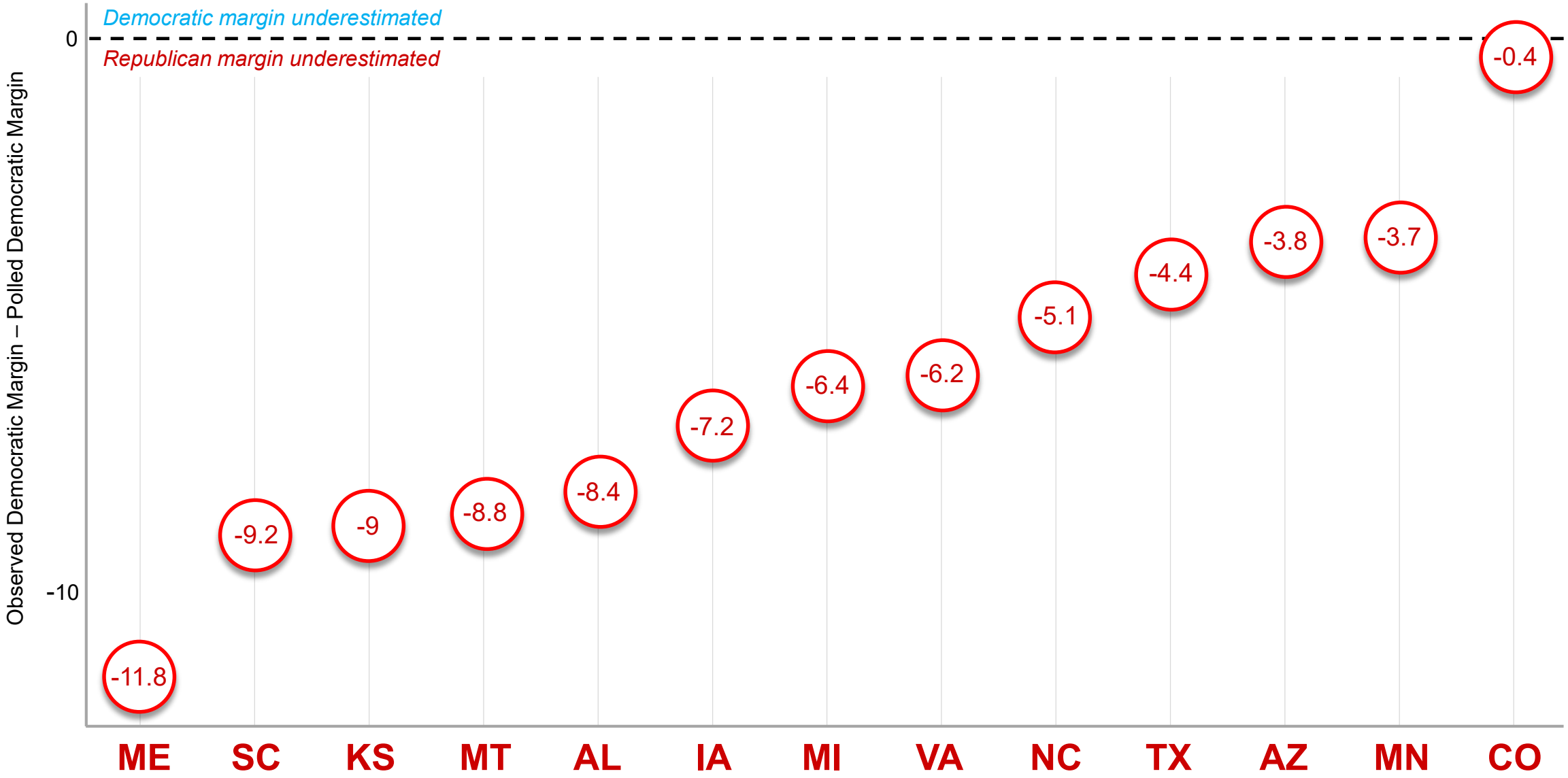
Presidential Poll Accuracy by State *(vote totals as of 11am 11/13; All polls within 2 weeks of election)*



Source: Ohio State political professor Tom Wood, @thomasjwood

NOT JUST TRUMP / PRESIDENTIAL: SENATE POLLING MISSED GOP VOTERS

Senate Poll Accuracy by State *(vote totals as of 11am 11/13; All polls within 2 weeks of election)*



Source: Ohio State political professor Tom Wood, @thomasjwood

EVEN THE EXIT POLLS DON'T AGREE

Large & Inexplicable Disparities Between the Two Competing Exit Polls



VS.

AP VOTECAST
ELECTION 2020

15,590 — *# of U.S. voters polled* — *110,485*

WHO VOTED *(Estimated Share of 2020 Electorate)*		
65% *(67%)*	**White**	**74%**
13%	**Latino / Hispanic**	**10%**
22%	**65+ (seniors)**	**27%**
34% *(35%)*	**White No College**	**44%**

HOW WE VOTED		
Trump +1 ***(B+9)***	**White Women College+**	**Biden +20**
Trump +12	**Household Income >$100k**	**Biden +4**
Biden +60	**African American Men**	**Biden +75**
Biden +3 *(B+2)*	**Suburban**	**Biden +10**

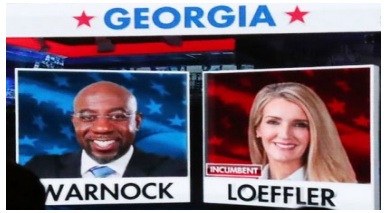
Sources (Linked):
Edison Research
AP Votecast

Shows Initial data published 11/4 and *(italics = adjusted data published 11/10 if different from initial)*

#7. WHAT TO EXPECT IN 2021

Challenging Politics, Challenging Times

SENATE CONTROL DETERMINED IN 2 GEORGIA RUNOFFS 1/5/21





Results of Major Statewide GA Races Since 2000

YEAR	PRESIDENT	SEN. SEAT 1	SEN. SEAT 2	GOVERNOR	LT. GOV	SEC. STATE
2020	49.5%	49.8%	48.5% *(all Rs)*			
2018				50.2%	51.6%	51.9%
2016	50.4%		54.8%			
2014		52.9%		52.7%	58.0%	57.5%
2012	53.3%					
2010			58.3%	53.0%	54.5%	56.2%
2008	52.2%	57.4%				
2006				57.9%	54.1%	54.1%
2004	60.0%		57.9%			
2002		52.8%		51.3%	51.9%	61.1%
2000	54.7%					

Source: Wikipedia; Ballotopia

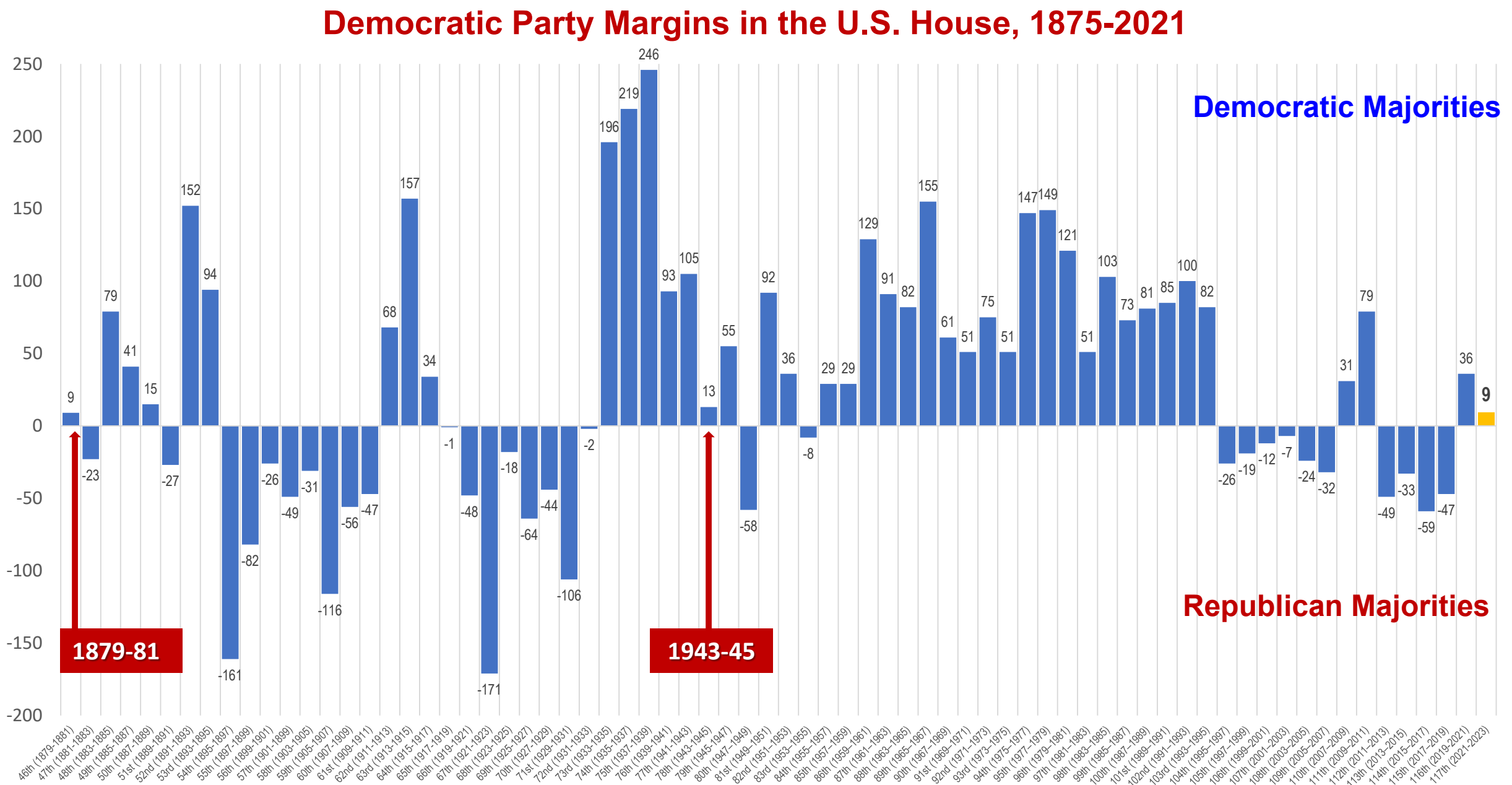
FIRST NEWLY-ELECTED DEMOCRAT WITHOUT A D-LED SENATE SINCE 1884



YEAR	1ST TERM DEMOCRATIC PRESIDENTS	SENATE MAJORITY PARTY	HOUSE MAJORITY PARTY
2020	Biden	GOP*	DEM
2008	Obama	DEM	DEM
1992	Clinton	DEM	DEM
1976	Carter	DEM	DEM
1964	Johnson	DEM	DEM
1960	Kennedy	DEM	DEM
1948	Truman	DEM	DEM
1932	FDR	DEM	DEM
1912	Wilson	DEM	DEM
1884	Cleveland	GOP	DEM
1856	Buchanan	DEM	DEM
1852	Pierce	DEM	DEM

Source: Author's calculations; *Assumes Democrats don't win both GA Senate runoffs 1/5/21

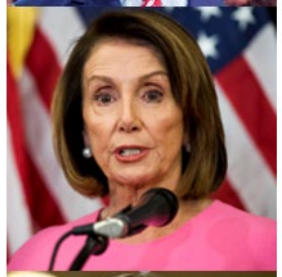
SMALLEST DEMOCRATIC MAJORITY IN HOUSE SINCE 1879-81



Source: House; **Assumes 222 D – 213 R in 117th**

THE POLITICS: HOW MUCH CAN GET DONE IN 2021?







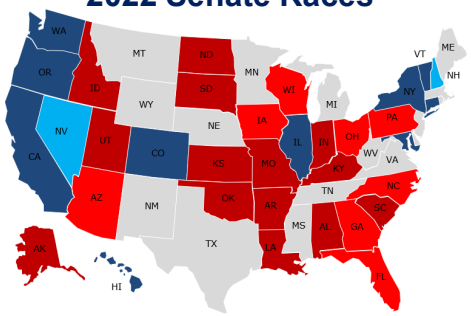
THE CASE FOR MORE	THE CASE FOR LESS
Top 3 leaders are **Deal Makers** with 113 years combined experience	**Wings** of parties oppose "dealing with the enemy," preferring causes to compromise
Crises (**COVID & economy**) demand cooperation & agreement	Pandemic has become **Partisan**, economic needs debated
Moderates in both parties want progress on problems	**Ideologues** in both parties want "purity"
Senate GOP & House Dem **Majorities At Risk** in purple states & districts	Politicians who compromise are more likely to face **Primary Challenges** from the fringes of their parties
Mainstream Media will paint compromise as courageous	**Social Media** will paint compromise as treachery







2022 Senate Races



KEY BIDEN ATTRIBUTES & CONSIDERATIONS

It's Possible That Only He Can Fix It



1. **He's a Legislator more than an Executive** (very comfortable cutting deals)

2. **He's Party Centrist more than an Ideological Moderate** (willing to compromise with anyone)

3. **He's an Institutionalist** (with great respect for the people, processes & protocol that make government work)

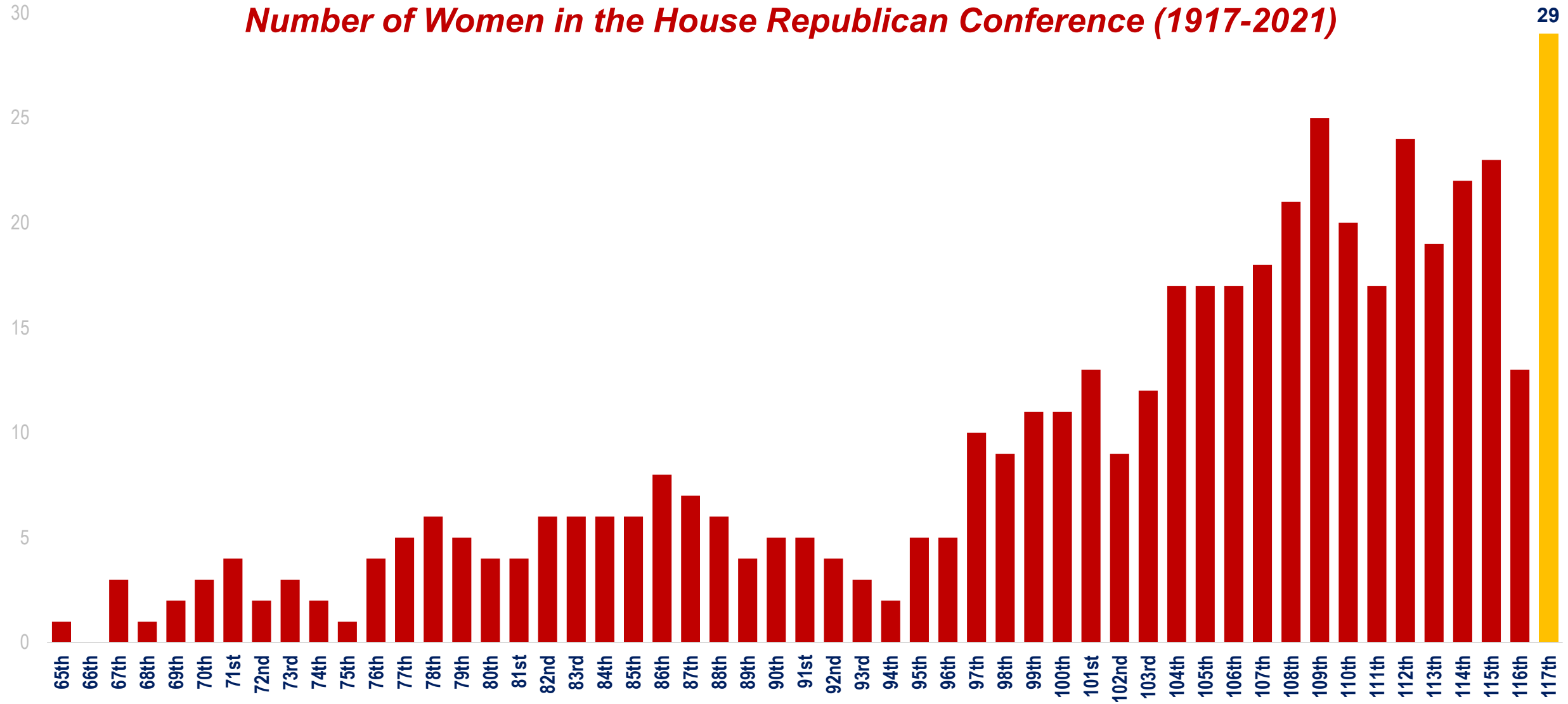
4. **He retains an Optimistic view of the GOP** (works well with Sen. McConnell, believes there are more Howard Baker / Bob Doles out there)

5. **He's a Transitional figure and he knows it** (trying to govern well rather than lead a revolution)

#8. BOTH PARTIES IN TRANSITION

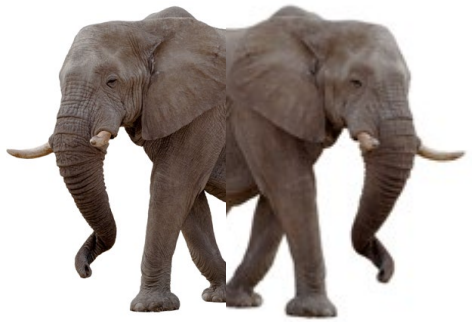
Historic Uncertainty about the Parties' Future Leadership & Direction

SOME GOOD NEWS: MOST EVER REPUBLICAN WOMEN IN THE U.S. HOUSE



Source: Rutgers Center for American Women & Politics

THE FIVE FACES OF THE GOP, 2021+



The Republican Civil War for the Future

	GOP REFORMERS	NEW DEAL-MAKERS	NEW REAGANITES	NEW #RESISTANCE	TRUMPISTS
MOTTO	**Be Competent & Non-Partisan**	**We Came to Govern**	**Take Back the Right**	**America First Nationalism**	**It's Trump's Party** (he can tweet if he wants to)
LEADERS	**Gov. Hogan** (MD) **Gov. Baker** (MA) **Gov. Scott** (VT)	**Collins** **Murkowski** **Romney**	**Rubio** **Sasse** **Toomey**	**Cotton** **Cruz** **Hawley**	**Pres. Trump** **VP Pence** **Trump Family**
PHILOSOPHY	• Most popular U.S. governors are Blue State GOP • Socially moderate • Fiscally conservative • Pragmatic problem solvers	• Legislate to solve problems • Democrats are the opposition, not the enemy	• Reformicons: • Free enterprise + Future of Work • Limited gov't + Modern safety net • Strong defense	• Control the border • Fight political correctness • End unfair trade deals, put America first	• DJT made America great… only he can fix it again • Democrats, Big Tech & Media stole election

Core Challenge: Republicans have won the popular vote for President once since 1988.

DEMOCRATS: INCREMENTALISM OR AGGRESSIVE PROGRESSIVISM?

The Democratic Civil War for the Future

PROGRESSIVES		MODERATES
	MEDICARE FOR ALL!	HEALTH CARE	OBAMACARE	
	GREEN NEW DEAL	ENERGY & ENVIRONMENT	PARIS CLIMATE AGREEMENT	
	WEALTH TAX	TAX	REPEAL THE TRUMP TAX	
		TECH & TELECOM	NETWORK NEUTRALITY	
	REPARATIONS NOW	CIVIL RIGHTS		
		IMMIGRATION	#PROTECT DREAMERS	

#9. MACRO TRENDS THAT MATTER

Regardless of Washington, Big Changes Are Coming, All Around the World

CONTEXT: KEY MACRO TRENDS



PANDEMIC

DOMINATING 2021

- Global infections peak in winter; U.S. lacks testing / tracing / masking
- Recovery undermined by mistrust/fear (masks, vaccines), state deficits & inequality



TECHNOLOGY

ACCELERATION

- Accelerating 4th Industrial Revolution Hyper-Digital Transformation hits eds, meds & Feds
- Ongoing Techlash drives policy in Congress, agencies, states & global



GEOPOLITICS

DEGLOBALIZATION

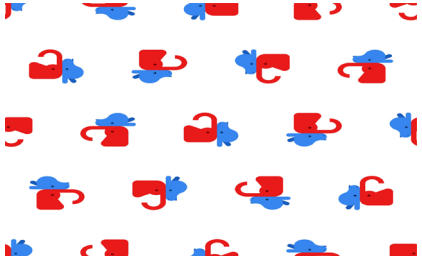
- Soft Power Vacuum (neither U.S. nor China trusted); Nationalism > Globalism
- U.S.-China Decoupling on tech, "critical" goods & sectors



CULTURE

HYPER-ACTIVISM

- BOTH left & right energized by 2020 election, anger amplified on cable & social media
- TRUST deficit exacerbated (government, media, elections, medicine)



POLITICS

REALIGNMENT

- Both parties face Civil Wars & future-defining identity crises
- Reform era accelerated, anchored by need for resilience economy

GEOPOLITICS: NEW WORLD ORDER TAKING SHAPE

Great Power Rivalry Returns



Multilateralism Remade

NEW MISSIONS, MANDATES, MODELS

WORLD TRADE ORGANIZATION

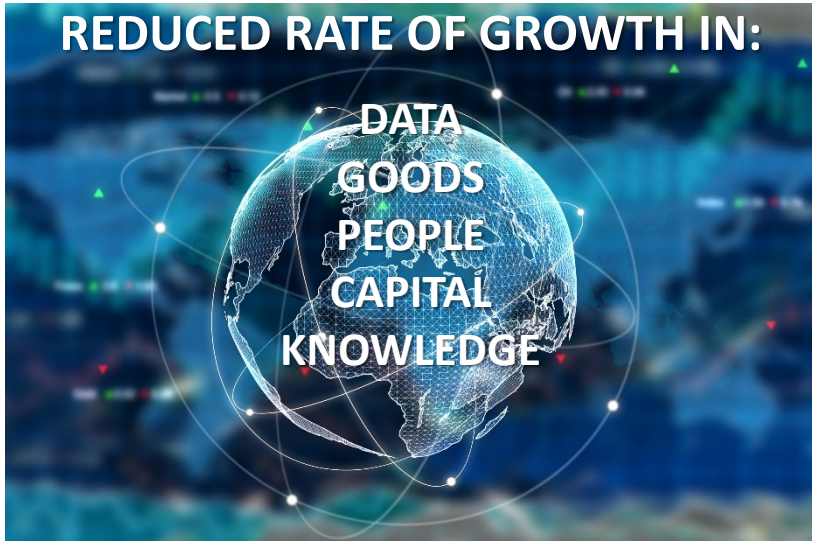
EU

WORLD ECONOMIC FORUM

NATO

TPP TRANS PACIFIC PARTNERSHIP

Cross-Border Flows Slow



Trade Economics Disrupted



#10. RECOMMENDATIONS

Engaging Washington in the Biden Era & Reasons for Faith in America

TIMETABLE: THE NEXT ~780 DAYS IN BIDEN'S WASHINGTON







	Lame Duck & Transition *(Nov-Jan 5th)*	First 100 Days *(Jan 20-Apr 30)*	First 2 Years *(Jan 20 – Midterms)*
POLITICS	• Recounts & Lawsuits • Leadership Elections • GA Senate runoffs	• Inauguration & Confirmations • Intra-Party Civil Wars • Temporary return of civility	• 2022 Midterms (both small Majorities at risk, many primaries?) • 2024 race begins (Will Biden run again? Will Trump?
PROCESS	• Transition planning • Trump Lame Duck: EOs, deals, purges & pardons, "midnight" regulations (no CRA), sanctions • "Lame Duck" Session	• Fill Cabinet, White House & Executive Branch jobs (4,013) • House will pass many bills that die in the Senate • 1st Trip abroad	• New Normal -Chaos → Calm -Aspirational → Practical -Throw for TDs → Run for 1st D's -Intra-Party deals → Inter-Party • McConnell controls floor
POLICY	• COVID stimulus • FY21 funding • Nat'l Defense Auth. Act • Health, tax "extenders"	• Reverse Trump EOs / Regs • Rejoin Paris, WHO, COVAX • COVID & economy dominate	• Increased oversight (pandemic profiteering, systemic failures, tech, health) • Post-Trump reforms (eg Hatch Act; Presidential tax returns, etc.) • Bipartisan Issues (e.g. Big Tech, China, infrastructure)

Source: Mehlman Castagnetti analysis

RECOMMENDATION: STRATEGY FOR ENGAGING WASHINGTON IN 2021

Employer engagement may hold the key:

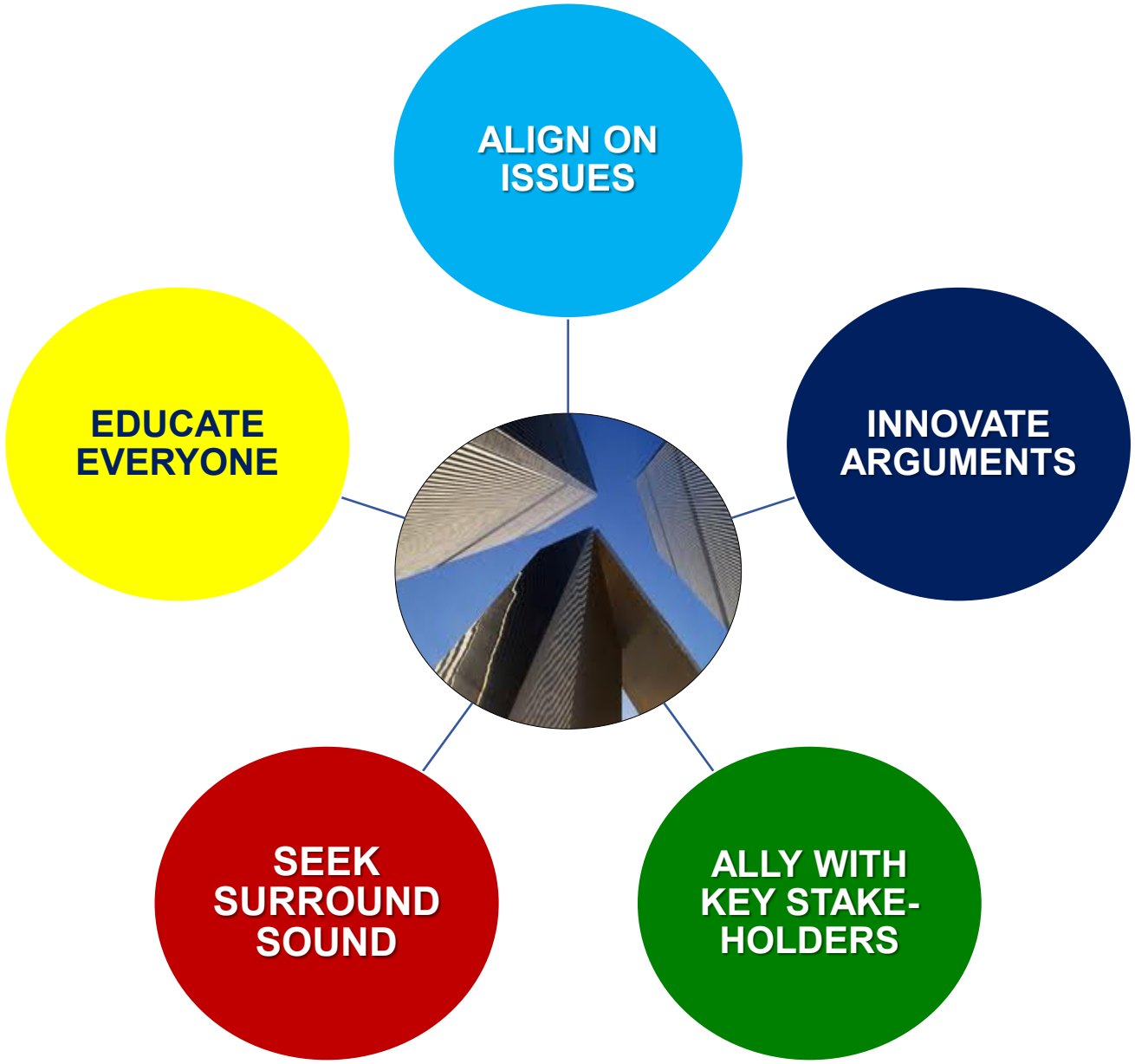
- Bipartisan coalitions succeeded in 2015-16:
- TSCA reform
- 21st Century Cures Act
- FAST Act (infrastructure)
- Trade Promotion Authority

Successful efforts require:

- Partnering with stakeholders on problems & solutions
- Working with high-impact NGOs & policy makers on both sides, aligning issues with values
- Running persistent, bipartisan, surround sound campaigns

Business leaders expected to step up:

- On issues of global & national concern
- Employees, customers, investors & activists looking for C-Suite leadership



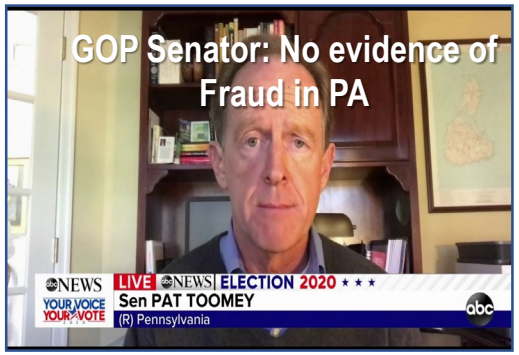
REASONS FOR HOPE FOR THE FUTURE

Reports of the Death of Our Democracy Are Greatly Exaggerated

No Foreign Interference



No Evidence of Fraud



Max Turnout, Not Intimidation



No Violence





Our System of Checks & Balances Held, Limiting President Trump as It Will President Biden



For future slides: bruce@mc-dc.com

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