



Transcript

US 2012: The Battleground for the Presidential Election

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Xenia Dormandy:

Welcome to 'US 2012: The Battleground for the Presidential Election'. First, we are going to hear from Celinda Lake. She is the president of Lake Research Partners, and one of the Democratic party's leading political strategists, serving as tactician, senior advisor to the national party, Democratic incumbents, and challenges at all level of the actual process. Her work has also, as I said, taken her to advising foreign governments, including the fledgling democratic parties in Bosnia and South Africa. Ed Goetas is president and CEO of the Tarrance group, one of the most prominent Republican survey, research and strategy teams in American politics. Now Ed and Celinda work together in the nationally recognized Battleground Poll, which is one of the country's, one of the US's political research programmes. With that, Celinda, it is all yours.

Celinda Lake:

Thank you. Thank you very much. Well, first of all I want to thank you all very, very much for having us. I want to thank the American Embassy for making this possible, and I must say Ed and I have thoroughly enjoyed our time here because we have just been flabbergasted at the amount of information that British people have about the American elections, and the sophistication of your questions has been really, really exciting, and so we are really excited about this forum as well.

It is always a great pleasure to be with Ed, and Ed is one of the toughest most outside-the-box strategist on either side of the aisle, and we have been working together for almost 21 years since we started the Battleground Survey over a piano bar in Budapest where we working on democracy. So, that might have been one of the best things that came out of that democracy effort as some of the former Soviet Union retraces its steps in terms of democracy, but that is a whole other Chatham House lecture. [Laughter]

Let's talk about fledgling democracy and floundering democracy in America. And what I'm going to do is to layout much of this data jointly from both of our polls, from the Battleground Poll, but just to lay out a little context about what is going on in terms of the mood of the country. So, first of all, the vast majority of Americans say that the country is going in the wrong direction. The only people who say in surveys that the country is going in the right direction are Democrats because when we get asked we think, 'Well, our guy is in charge, what are we supposed to say? I guess "right direction", even though we are not too happy with the way things are going.' And this question that we

ask of what emotion do you associate is actually a far greater predictor; the bigger the worry, the more people who volunteer it. And you can see here the kinds of emotions about people feeling discouraged, disappointed, scared, uncertain; it is a very, very precarious time in the United States.

Most people do not believe the economy is going to get better; only a third of Americans say the economy is going to get better. 46% say the economy is going to stay the same. The same is not good here and it is not good from two different perspectives. One perspective is that the same means bad; and, two, one of the central things about the American psyche is that what really determines the psyche and the kind of mood that the public has is not the status thing of anything, but the direction in which it is headed. Americans will put up with a lot as long as they think that it is going to be better over the next horizon, or better tomorrow, or better on the other side of the mountains. And there is a very profound pessimism in the US right now, which effects very much the mood of the public and our electoral situation.

That pessimism is founded or anchored by some very, very pessimistic assessments about the economy. So, 51% of Americans believe that they will not be able to maintain their standard of living in the next year; 43% believe they they may not be able to pay a medical cost in the next 12 months; and 34% believe that they or their spouse might lose their job in the next month. And you can see there has been no – despite the so-called recovery – there has been no abating of those feelings. So, this is a very, very challenging time in the American economy, and a challenging time for an incumbent president who, on the one hand, wants to talk about the successes and how bad it could be if he hadn't taken the actions he has taken, but on the other hand faces an electorate that is very, very pessimistic.

Bill Clinton faced much the same in 1992, and Bill Clinton used to run around saying, you know, 'I created 2 million jobs,' and it wasn't working very well for him. We finally did focus groups, which were smaller discussion groups in south-east Los Angeles and one of the woman in the groups said... you know, we said the president says he has created 2 million jobs, and the woman said, 'Yeah, and I have got three of them.' [Laughter] And we took that tape back to the president and that is when he changed his dialogue and said, 'I have created 2 million jobs, but that is not good enough. We have to have jobs that pay well, we have to have jobs you can have a future in.'

The second piece of America's pessimism is the future for the next generation, and you now have 59% of Americans who say that the next generation will be worse off economically than they are. This... it is hard to

express what a fundamental violation of kind of the compact of America, because in the US we feel like, 'Okay, we work our brains out in two and a half jobs and get only a week of vacation, and we put up with your kids as a teenagers who are barely tolerable,' because they are supposed to be better off.' And if they are not better of that is a pretty fundamental violation of what this country is about, and what the American dream is supposed to be about. So, there is embedded here a very, very difficult climate. As you will remember, James Carville said, 'It's the economy, stupid!' On the Democratic side we have an inside joke now where we say, 'It is the economy, moron!' And you can see the economy dominating the agenda, but people are worried about different aspects of the economy.

So, Democrats are worried about jobs and the economy in general; independents focus the most on the economy, which means inflation, what jobs pay, what kind of economy security and stability there is; and then the GOP voters are worried about the deficit, and the impact of the deficit on the economy. So, complicating this situation is that even though the economy is dominating, Americans are focused on different aspects of the economy.

This chart that looks like America going into cardiac arrest is the president's job approval numbers, and you can see here it is really flat-lining evenly around the job performance. And obviously any incumbent wants to have a net positive job performance number to assure re-election, and the challenge of the Republicans is that they want to make this election a referendum on the incumbent. The challenge for the Democrats is for us to switch that from being a referendum on the incumbent to being a choice between two alternatives for the future. And watch the two campaigns really battle over the summer and the fall to try to control the definition of the race. We have a saying in the United States that 'the campaign that sets the frame – the campaign that sets the question – determines who is going to win.' And these two campaigns are going to fight hard to set the question.

President Obama does have very, very high personal approval, and that is a real asset. People think very, very highly of him as a person; he is a good family man, a good father, he is honest, you don't expect a scandal, he is earnest, he is in touch, he is very smart, he tries to think things through, he really wants to do the best job. And for those last women voters who determine, the last deciding voters – and I will tell you that the key electorate in my mind that will determine the election will be white, non-college women who are independents. That will be the swing voter in the final days; so the waitress mom, if you will, in the electorate. The personal is political for her. So, the fact that she feels so strongly about as a person may be a tiebreaker,

but the president is also going to have to prove that he gets her family's economic situation and in her mind that situation isn't very good right now.

This is the president's job approval rating in a number of key areas. You can see that foreign policy is a real strength; I don't know, there may be a range of views about America's foreign policy. Don't look for any changes in the near future because foreign policy, the decisiveness that the president has shown, his successes, his leadership style is a real anchor of his strength right now, and voters feel very strongly that he has done a good job. People also believe that he stands up for the middle class, that he is in touch, and this is a contrast that the Democrats will try to draw very distinctly with Mitt Romney. We are going to distinguish between someone who gets what your life is like, who is for the middle class, someone who has off-shore bank accounts, someone who forgets to declare \$300,000 worth of income, someone who has elevators in their house for their cars. This is not your average American story, or even your average American success story. On the Democratic side we will try to say that someone with this kind of background is not going to be in touch with your life. But the economy, you will notice, is much, much more of a battleground, and what we need to do is get ahead on our plans on the economy.

One of the things that was very for us as Democrats to watch what we thought was the debacle of the Republican primary. We really, really enjoyed each of those debates; they were really fun for us. Ed may have been having less fun, but Ed warned me at the time that Romney was going to come back fast, and I have to say that I think Democrats were really surprised at how fast Romney rehabilitated himself. And while he is not liked or approved of as much as Barack Obama, you can see that he has solidly improved his numbers, and that is one of the reasons why the race is really even right now.

So, if we look at this as a choice rather than a referendum, you can see that we have strong advantages on 'standing up for the middle class', foreign policy, and 'shares your values'. 'Shares your values' has become less of a moral question and more about who is in touch with your life; but we are not having any major advantage on the economy and jobs, where we really need to acquire an advantage. Notice Democrats are also ahead on taxes. This is the first time we have been ahead on taxes in decades, and watch for the Democrats to fight hard on the message that the wealthy are not paying their share, it is not fair that Mitt Romney is paying a lower tax rate than his secretary is, and you will hear that a lot in the US elections.

If framing this as a choice is job one for the Democrats, job two for the Democrats is getting out our vote. And one of the things... we got two sobering lessons in June. First of all, we had counted on us being able to out raise or even the Republicans, and it was a real shock to see the kind of money that Republicans raised in Wisconsin, and beating us at the presidential level. So, that is something that you will watch the Democrats really pound home to try to raise the money that we need and to be competitive.

The second thing that we saw in Wisconsin was the really able job that the Republicans did – and much of this a real expertise that Ed brings to the table – of getting out the Republican vote. And though we met our goals, we were beat because they way surpassed their goals. We have demographics in our favour because we have increasing numbers of unmarried Americans, younger Americans, people of colour; but they don't vote at the same rate, so we have got to get our vote out.

So, here you see... everyone knows the gender gap, women vote more Democrat than men. There is also a big marital gap, with unmarried voters voting very Democratic and married voters voting more Republican. One of the things I say to my friends on the Democratic side who are all matchmakers is 'December weddings, it is really nice to have Christmas weddings, no weddings before the election!' [Laughter]

Age is another big factor; the young people vote produced – it wasn't just the increase in turnout as everybody was talking about, it was the margin that we had among the young vote – they really helped deliver the Obama victory. You can see, the younger that you are the better or the more likely you are to vote Democratic. This hasn't always been true, in fact the seniors used to be a bastion of Democratic support. So, we need to get this young voter out to vote as well as the Latino and the African-American voter.

Finally, a number of people here have asked us the question, 'Why doesn't Obama run more on the issue of who you blame, where you came from?' And frankly we would run on anything. We would run on 'Mars is made of green cheese' if it would get us elected, so that is not the issue. But it doesn't test very well, and part of it is that psyche that 'I don't care who caused this, it is your watch now, what are you going to do about it?' And America is very solution-oriented right now. We have found that messages can have like one-third set up of the problem, but they need to have two-thirds of the solution because people think, 'I could sit down at the bar with my friends and hear a

very eloquent dissertation of the problem; I want to know what you are going to do about it.'

But this was also a sobering reminder from the 2010 exit polls. This is asking, 'Who do you blame for the economy?' Obviously if you blamed Barack Obama you voted overwhelmingly Republican, if you blamed George Bush you voted overwhelmingly Democratic. The interesting one is the first one. If you blamed Wall Street in November 2010 for the economic of the United States, you voted 16 points Republican. That was a huge shock to our side, and the repercussions of that shock is that the Democrats I think are still struggling a little bit with how do we frame this economic vision, how do we frame this economic plan, and what is the mixture of what we have done and what we need to do?

So, having set that up a little bit, let me turn it over to Ed.

[Applause]

Ed Goeas:

I am actually going to take my jacket off, if that is alright, and grab my notes here.

I will just say a few things about Celinda and the Battleground. First of all, we are very proud of what we put together on the Battleground Poll. Yes, we were sitting in a bar in Hungary – a piano bar – talking about, really kind of looking at national polling, talking about our frustrating at the time, little did we know how bad it was going to get. [Laughter] The frustration public polls and how little explanation or depth there was in terms of the polls, and in fact we do polling now at George Washington University and Politico, and I will tell you at Politico they are more of a news agency, and we are fighting daily with them to make sure that we are actually asking barriers of questions to really delve down and see what the issues are as opposed to what I like to call 'the political questions of the day'. We reached a point in the 2004 campaign that in September and October, 87% of stories of all the stories on the presidential campaign was generated by stories about polling numbers as opposed to stories about what the candidates were talking about and the issues. And I think that was very unfortunate; we try to avoid that.

Very often we talk about it being a bipartisan poll – in honesty it is actually a purely partisan poll. One of the unique things we do is that we write a separate strategic analysis based on the numbers. We don't see each other's analysis until we are releasing it to the press. And I think that way – in any

kind of poll you have good news and bad news for both sides of the aisle – she does a very good job of bringing out the bad news for us, and I do a very good job of bringing out the bad news for them, and vice versa on the good news. But in the five presidential elections that we have been doing the Battleground, we have been closest in three of the five presidential elections all the national polls, and in one of those we tied with four other firms with being the closest. So, we have actually been the closest four of the last five presidential elections. So, we feel pretty solid about the numbers.

So, let me say something about Celinda. One of the unique things about us is we involved in politics a long time. I actually walked into the doors of the first campaign headquarters I ever worked in... in another two years it will be 50 years. I was twelve years old, I have worked in campaigns ever since, and I turn 60 in two months. Celinda – not maybe quite so long – but professionally certainly has. The interesting thing is Celinda grew up in a Republican family and changed parties after the 1972 campaign that she had worked for Richard Nixon. I grew up in a very Democratic family and worked in my last Democratic campaign for George McGovern. But, like reformed smokers, we are both passionate about the sides that we have taken. [Laughter] And it is the one thing I have to say about Celinda, my just deep, profound respect for this lady, the professionalism she brings, the commitment to doing the right thing for the candidates, the commitment for really making a change; I just can't say enough good about her, and it has been a real joy working with her even though I don't agree with a damn thing that she says. [Laughter]

I do have to tease her a little bit; I always do when she uses overheads. I never use overheads, but Celinda used to talking to Democrats and they need a picture to kind of understand what you are saying [laughter], where I am used to talking to Republicans.

A couple of things... Let me start off really quickly on the myths of the 2008 campaign because it was extremely frustrating to us pollsters to watch so many of the national polls in the 2008 election not do their basic due diligence on pooling a sample, looking at likely voters, and getting down to likely voters. And instead what they were doing was that they were polling their samples based on their projection of what the election would be and who would be involved in that election, and we all heard about the transitional groups that just surged out to vote. In reality, in reality... for a percentage of the adult aged population in the United States, turnout in the election was only two tenths of a percent higher than four years earlier in 2004. Every demographic group that you look at – every key demographic group that you look at – was not more than a per cent more or a per cent less than what they had voted

four years before. Young voters, one percent higher; African-American voters, one point higher; Hispanic voters was the same; women actually a percent less.

So, there wasn't this kind of tremendously different electorate that was out there, and in fact I see a lot of young people here in the room. One of the messages I think I have been able to move Republicans to an understanding is that on the youth vote, we watched the youth vote go from 2000 to 2004 to 2008, being 16% of the votes cast to 17% of the votes cast to 18% of the votes cast. In that period of time – so not a huge surge over that eight years – in that period of time, however, Republicans in 2000 won the youth vote by a percentage, in 2004 lost them by 11 points, and in 2008 lost them by 34 points. That difference between winning by one point in 2000 and losing in 2008 by 34 points accounted for six points of the seven-point victory that Obama had in the election. Almost every other demographic group you look at came out of that youth vote, and it was very important for me to drive home to the Republicans that it wasn't a surge in the youth vote; we lost the youth vote. And it became very important in terms of the messaging and what we were doing in the future. So, that is kind of laying out the 2008 election.

I will say the election by all accounts – and I may have come to this conclusion a little bit earlier than Celinda did, but I think Celinda came to this conclusion a lot earlier than most Democrats – that this is going to be a very, very close election. We actually have had it flat for almost six weeks now ever since Romney the nomination it has been even, a point up, and point down, we had it five weeks ago at two points up for Romney. There are some dynamics there that we track and we watch very closely. First of all, for all the talk about the partisanship in Washington, one of the things that I always stress with the groups – and we have been at this, basically, we have been at this number for almost 15 to 20 years now – that basically there is a split in the American public that is fairly even. Today about 53% [sic] of the country is Democratic and 40% of the country is Republican – very split. And so one of the first things we look at from a campaign standpoint is two things: where is the intensity of the vote? And today the intensity of the Republican vote is 9 points higher than the intensity of the Democratic vote, so again you start evening out a little bit that 43-42.

Second of all, the big surprise recently, which goes back to the that the Democrats thought that the primaries were good for them, all the news accounts that kept coming up turn out in the primaries for Republicans, my response to the news media was 'That is because Barack Obama isn't on the ballot.' You put Barack Obama on the ballot and Republicans are going to

come out because they are going to come out to vote against him. And one of the things... the next thing we looked at though was party loyalty, and it reinforces the party loyalty. Today, Romney is winning Republican votes by a net 88 points. Obama is winning the Democratic vote by a net 83 points. So, we have a nine-point advantage on intensity, a five-point advantage on party loyalty, which brings us down to maybe a dead even race, and it brings you in to looking at... ok, let's look at the independents.

The independents, I had a lot of fun kind of, again, watching the pundits out there, especially the news media looking at the independents. We have gone through, or we have suffered through – or I have suffered through – story after story after story about the 'Obama independent'. Where is the Obama independent in this next election? First of all, independents will comprise about 28% of the votes cast in this presidential election. They talk about the independent vote like Obama won 100% of it. He only won the independent vote by a net seven points, the same margin that he won the overall election by.

More importantly is, if we delve down into the data what we find is that only 50% of the independents vote in every presidential election, only 50%. They will comprise about two thirds of the vote, the independent vote that will be cast. Two thirds of the independents vote in every presidential election. The other third is what I call the angry independents. The thing that motivates them to vote in some elections and not others is anger towards one candidate or the other, or one party or another. And I can guarantee you that the angry independent of 2012 is not the same as the angry independent of 2008, which is why today Romney leads with the independent vote by 10 percentage points. So, when we talk about a dead-even race, the only other factor that you would add in a little bit later is the intensity difference. What is the factor going to be on the angry independents? What is the factor going to be on the independents that turnout?

Now, I will touch upon another couple of things very quickly. I love to give Celinda a hard time about the likeability issue; she gives the party line, she is very loyal about going out there and talking about the likeability issue. I believe it is fool's gold for the Democrats to talk about the likeability issue. In our survey that she was showing you here that 72% approve of the president personally, what that translated into is 24% of our sample disapproved of the job the president was doing but approved of the president personally. But then when we applied a re-elect question to those people, 68% said they were not going to vote to re-elect the president, and in fact would vote against him; 28% said they were going to consider another candidate; 6% said they

were unsure what they were going to do; and only 6% said they were going to vote to re-elect the president. That means that he has a lot more to do to move them with than just likeability. Now admittedly, the fact that they say they are favourable towards him from a personal standpoint means that they may remain open to his messages through the campaign, but it doesn't mean that automatically that is going to be the key determinant in the election.

70% of our electorate is focuses on the economy, or pocket-book issues. Romney is winning with that group by 54-43. The whole issue of identifying with the voters; I think the voters are long past that. They want to know who is going to come in and truly fix it as opposed to who they feel understands their plight because believe me everyone in the country understands the plight of everyone else in terms of this economy and what is going on.

I think one of the things that is going to become – and I agree with Celinda on the women's issues – are women in terms of this election. But one of the things that has always surprised me – Celinda doesn't do a great deal of this, but certainly has done a great deal in talking about the American electorate – is I am constantly surprised how often women are talked about as a monolithic group, and they are not, they are vastly different. Not only are we winning with married women, but white married women we are married by 18 points, white married women with children at home we are winning by 22 points. Single white women we are losing by 74 points, African-American women we are losing by 93 points, Hispanic women we are losing by 67 points; big difference between those two groups. And I think one of the things the Democrats have found out recently in terms of their 'war on women' is that there was a difference amongst these groups on who was at war with who, especially when you look at economic issues.

I will come down to one last thing in talking about the economy. We asked a very interesting question on the survey, which was: 'Do you believe that Barack Obama made the economy better, made it worse, or had no impact?' 40% of our sample said that he had made the economy better, and 91% of those voters said they were going to vote for Barack Obama. 39% said he had made the economy worse; 91% of those voters said they were going to vote for Romney. 19% of the voters said that he had not had an impact on the economy, and Romney was winning over Obama by 46-44. I believe this is going to be a very close election, but one of the things to watch is what happens with that 19%. My advice, and we can see where the president is going... one of the things we know as pollsters is that it takes six – and I think Celinda mentioned this – it takes six solid months of good economic news for the American public to come to the conclusion the economy has improved.

We are now inside that window with the unemployment numbers going up, and I think the president has struggled with a couple of comments in the last ten days with a couple of comments by the voters, by saying things that make him seem like he is not connected with the voters, that he believes in fact the economy is doing better than they perceive. He is going to have to get off of that, and get off of that very quickly.

But how will those voters end up at the end of the day? We know what his message is going to be. His message is going to be, 'I have made some improvements' – he is not going to blame it on Bush, he is not going to blame it on Europeans and their economy – he is going to have to say, 'We made some improvements, and you need to re-elect me for another four years so I can finish the job I am doing.' I believe our job is simpler. I believe our job is all we have to do is in that 20% or 19%, plant the question in their minds, 'Can you afford four more years of Barack Obama?' And if they do not walk into the polling place on election day saying, 'Yes, I can afford four more years,' they are not going to vote for him. And I think you can see that 20% break open.

The one thing that we are having some fun with internally and you are going to see more and more about it – and I do a great deal of governors, my firm won nine governors in the last election in a lot of the key races, you heard about Scott Walker, John Kasich in Ohio, Michigan, Pennsylvania. Of the ten most economically improved states in 2011 as we are beginning to see some signs of growth in the economy, in seven of the ten states that were most improved economically, they are states in which Republican governors replaced Democratic governors and like Scott Walker and John Kasich implemented Republican policies that began turning around the economy, and I think that is something you will hear about.

We believe our electoral map is very simple; you need 270 electoral votes to win the presidency; we have governors in 300 electoral votes worth of states. And they are not in New York that we can't win, or California that we can't win, every one of those states we could win in the fall. So our map is very clear. I think what Obama is going to have to do is try and expand that map.

Let me quit there. Thank you.

[Applause]