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## THEY SAID IT

There are many methods for predicting the future. For example, you can read horoscopes, tea leaves, tarot cards, or crystal balls. Collectively, these methods are known as “nutty methods.”

Or you can put well-researched facts into sophisticated computer models, more commonly referred to as “a complete waste of time.”

--*Dilbert* creator Scott Adams.

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## SOME THOUGHTS ON THE ELECTION.

Some weeks ago, we decided that we were not going to do an Election Day/Prediction scorecard like we did two years ago, in large part because this election has been exceptionally difficult to call, with most honest and serious analysts insisting to this very moment that the range of possible outcomes is very wide. But as the big day drew closer, we changed our minds, figuring that we had to put out something. After all, what good are Washington analysts if they don't analyze Washington?

Nevertheless, our task is a formidable one. Unlike the 2004 race, no overarching trend has emerged this year to convince us one way or the other about the likely results. It was clear back then that the mainstream media and the usual collection of pollsters and election prognosticators had missed the groundswell of support for President Bush and Republican candidates within their party's base and had therefore underestimated both GOP turnout and the effect that this would have on the outcome of the various contests. We sensed early on that the conventional wisdom was very wrong and predicted accordingly, correctly calling 48 of 50 states and the overall winner in the presidential contest, and 32 of 33 Senate races.

By contrast, today, we are nowhere near as certain about the prevailing undercurrents or likely outcomes, though we do sense once again that the media and the pundits are underestimating Republican strength. It's as if these guys settle on a handful of clichés about the election early on in the cycle and then spend the rest of the campaign trying to force all of their analysis to correspond to those clichés, regardless of what the actual on-the-ground data show. And since most of the clichés this time around posited bad, bad things for the GOP, most of the coverage of the campaign has forecast the same.

What we know for certain is that someone is going to go to bed tonight shocked and disappointed. Among the wildly divergent predictions are a handful that forecast small GOP gains (that's right, *gains*) in both houses and more than a handful that suggest that Democrats will have one of their best election nights

ever, picking up somewhere between 35 and 80 seats in the House and more than enough (6) to take back majority in the Senate as well. Surprisingly, the outlier predictions favoring the Democrats have been made by some of the best known, most respected prognosticators in the business, including Charlie Cook and Stuart Rothenberg, both of whom have predicted that a “Democratic wave” will sweep the nation today.

Obviously, someone here is cocooning, that is interpreting data in the most optimistic possible light and ignoring any news, numbers, or information that conflicts with their rosy scenario. Strangely enough, we think it is likely that the “cocooners” are the big shots, Cook and Rothenberg, both of whom called the contest for Kerry in 2004 and both of whom appear to be repeating the mistakes they made then.

For a variety of reasons, it strikes us that the old school prognosticators, folks like Cook, Rothenberg, and Dick Morris have overestimated the likely Democratic surge. Cook’s and Rothenberg’s predictions actually contradict the variables and statistical measures that they themselves established, thereby suggesting that Democrats will outperform all models and will win virtually every contest imaginable, including many that no one – not even they themselves – had expected. As polling expert Jay Cost put it, Rothenberg and Cook are expecting “a massive movement of seats toward the Democrats” that even they can’t identify. As for Morris, he appears to be in the grip of some malady that causes violent mood swings. He declared last week that the election was once again a “dead heat,” but woke up today, took a look at the GOP’s improved weekend poll numbers, and proceeded to warn Republicans to expect a “bloody Tuesday.”

Morris also insists on clinging to the old electoral truism that undecided voters *always* break heavily for the challenger, which as blogger Mickey Kaus has pointed out, suggests that every close Senate race will go to the Democrats. But despite Morris’s insistence, evidence from the last election in particular suggests that in the post-9/11, internet age, the so-called “incumbent” rule may not be such a useful predictor, since in that contest undecideds broke fairly evenly.

And that, we think, may end up being the theme of the day. We just can’t shake the feeling that something has changed in American voter behavior over the last several election cycles that has yet to be identified or even, for that matter, detected by the mainstream prognosticators. This explains why they performed so badly in 2002 and 2004 and why their forecasts this year seem so out of line with what seems probable.

We can’t put our finger on this ethereal “something” that has changed. It may internet related; it may be terrorism related. We don’t know. But we do sense that things are different. And, more to the point, *we sense that this difference means that the old prognostication methodology will consistently underestimate Republican participation and thus will underestimate the strength of Republican candidates.*

For example, the mainstream press and forecasters have insisted all year – and continue to insist to this very day – that this election pits a motivated and hungry Democratic base against an apathetic and “dispirited” Republican base. And they’ve insisted that this is the case for all the obvious reasons: because Bush’s poll numbers are down; because conservative elites are voicing their unhappiness; and because this is the sixth year of the Bush presidency. Yet there are several reasons to doubt that the GOP base is as dispirited as the pundits and prognosticators would have us believe. Republican voters have demonstrated “intensity” in numerous polls. The number of new donors to the party (long considered a good measure of engagement) has been exceptionally high. And the number of Republicans participating in early voting and requesting absentee ballots has also been high. All things considered, we’re not sure we buy the “dispirited base” theory.

A second reason to question the old methodologies is our belief that many of the polls on which the “Democratic wave” theories are based are hopelessly biased. Most of the polls this year have been over-weighted heavily with Democratic participants, despite the fact that Republicans and Democrats comprised equal fractions of the electorate in 2004. Naturally, this suggests that the Democratic support shown in these polls may be overstated. Some pollsters have attempted to explain the shift toward Democratic

respondents (who now purportedly comprise 38% of the electorate to the GOP's 31%) and a few have even done so reasonably. Nevertheless, there exists data that might contradict the presumption that underpins nearly all of the poll numbers we've seen of late. As the indispensable Jay Cost pointed out last week:

Curtis Gans of American University's Center for the Study of the American Electorate has just published a new report that analyzes nationwide registration data. Based upon the 34 states that have reported registration statistics, he finds that 68% of the voting age public is eligible to vote. This is unchanged since 2002.

Gans also offers some surprising information on partisan registration. He has analyzed the 13 states that have supplied partisan registration voting data, comparing them to prior years. Relative to 2002, the Republicans have actually closed the registration gap. In 2002, the Democrats had a 7.0% registration advantage over Republicans in these 13 states. This year, their advantage is down to 5.8%. I won't report the actual figures because they are inflated (due to deaths and geographical movement), but the trend lines here are, as Gans argues, valid (so long, of course, as Democrats are no more likely to have died or moved than Republicans).

Does this mean that as many Republicans will vote as Democrats? No. But it does mean that significant parts of the media and pollster narrative – a narrative on which expectations of Democratic landslides have been built – are quite likely flawed.

It is possible the Republican momentum as seen in polls over the weekend will yield nothing positive for the GOP today. As columnist John Podhoretz reminded GOP enthusiasts yesterday, Gerald Ford showed considerable momentum coming out of the final weekend of the 1976 campaign, yet still was beaten like a drum. In other words, it is conceivable

that the election will play out precisely as the most optimistic Democratic-leaning pollsters and prognosticators have foreseen.

But we doubt it.

We tend to think that the vast majority of pundits, those who have predicted that the Democrats will narrowly take the House while the GOP narrowly retains the Senate, are probably closer to correct than are Rothenberg, Cook, and Morris. A range of 12-24 net House seat gains and 3-6 net Senate seat gains for the Democrats seems reasonable enough to us. But as we've noted, this election is very, very hard to handicap, given the great number of unknowns.

If forced to make our own prediction (and we guess that's the whole point of this exercise), we'd guess it would look something like this:

*Democrats will gain a net of 4 seats in the Senate, leaving the GOP with a 51-47-2 advantage (with both of the independents, Lieberman and Sanders, caucusing with the Democrats). We also predict that one of those 51 Republican Senators will be Michael Steele of Maryland. Last January, we predicted that one of the three black conservatives running for statewide office (Steele; Lynn Swann, running for governor in Pennsylvania; and Ken Blackwell, running for governor in Ohio) would win. And we stand by that prediction. Steele triumphs in an enormous upset.*

*On the House side, we forecast a Democratic net gain of 12 seats. That's right, 12 seats, which will leave the Democrats three seats short of the magic number and will leave the GOP in power.*

We realize that all of this is counterintuitive. And we would not be at all surprised if we are wrong. We can't emphasize enough the fact that this election has been an extremely difficult one to "get a handle on." Indeed, almost nothing will surprise us today, except perhaps the "landslide" that Cook, Rothenberg, and Morris have told us to expect. The paradigm in electoral prognostication has shifted. No one is sure why or by how much. But clearly something has changed.

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