

# Decision 2024: Red Dawn or Blue Skies

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People again told us this will be the most important election in our lifetime. We are looking again at an election that appears to be fifty-fifty, close to being a tie. We look again at a race that is going to fall on typical post-Trump demographic patterns, which is to say that whites without a college degree will be overwhelmingly Republican, and whites with college degrees, who were once the bastion of the Republican party, will be increasingly moving to the Democrats.

The question is, amid all this angst and fog, how will the election turn out? I'm often asked to predict the election. I also respond that anyone who predicts the election nine weeks in advance is somebody whose prediction you ought not to listen to. So, I will not predict the election, but what I will do tonight is say, what direction the race is trending and why? Based on what I can see, it is more likely than not that Trump will win, although things can change. I'll explain how I came to that conclusion by looking at polling and the fundamentals of electoral behavior and political demography. And then I will say, what can go wrong? How can my mind change between now and election day? And what factors might those be?

I was asked on a radio show a couple of weeks ago, what would surprise you about the election? What could happen between now and then that would surprise you? By definition, I'd have to be surprised, and so, I couldn't tell you that. But the late Defense Secretary Donald Rumsfeld talked about known unknowns and unknown unknowns that anyone who is planning a military adventure can prepare for. By definition, you can't prepare for the unknown unknowns. That's the genuine surprise. You can say in advance that there are certain things you know will be important, but you cannot predict or calculate what will transpire, like unit morale. There are known unknowns in this American election, though, which I will describe.

After I talk about the presidential election, I'd like to end very briefly with a rundown of the Congressional races. I will explain how they relate to the presidential election, why that relationship is more important now than it might have been twenty years ago, and why the presidential election is likely to be the determinant of who controls at least one chamber of Congress.

Let me start with the bottom line that you're all waiting for. Who will win the 2024 election? I give a slight edge to Donald Trump. Why do I say that? I'm not the only person who says that. Nate Silver, who invented FiveThirtyEight.com, now has his own publication called the Silver Bulletin. (He's a good marketer.) And he, as of this afternoon, gives Trump a 64.4% chance of winning the electoral college. Now, that has changed for him in the last three weeks, and it will change again if the data permits. But why does Nate have it there and why do I concur?

To understand, we must step back into the 2016 election. That election was historic. It was not the first time that a president won the presidency by losing the popular vote and winning the Electoral College. George W. Bush did that in 2000; Benjamin Harrison did that in 1888; John Quincy Adams did that in 1824; and Rutherford B. Hayes did that in 1877. However, 2016 was the first time somebody did that while losing the popular vote by more than a point without having the vote sent to the House of Representatives or a special commission. In 1824, four candidates got electoral college votes, and the vote went to the House. In a stolen election in 1876, there was so much confusion about the electoral votes in three states that effectively the Republicans and the Democrats cut a back-room deal. The nation did not have a way of resolving disputed electoral vote counts until after that.

Trump's unusual victory happened even though he did not get a much higher percentage of the vote than Mitt Romney did. He did, however, win a much, much larger share of whites without a college degree than Republicans had won before, and more, certainly, than Mitt Romney had won. Because whites without a college degree are a very high percentage of the electorate in the Midwest, it meant that Electoral College votes in the Midwest could be swayed by large groups of these voters changing parties.

The blue-collar white votes that switched from Obama to Trump thus created what we now have: an imbalance that favors the Republicans between the Electoral College count and the popular vote. This became clear in 2020 when Joe Biden won with roughly the same percentage that Barack Obama had won. He won by 4.4% of the vote, about what Obama beat Romney by. The three closest states were decided by less than a percentage point, though, and Pennsylvania, the fourth closest state, was decided by 1.18 percentage points. That means if Biden had won by only 3.6% instead of 4.4%, and you assume an even swing across the country, Donald Trump, not Joe Biden, would've won the election.

So, the question is not whether Kamala Harris can win the popular vote. Nate Silver's model gives Kamala Harris a 55% chance of winning the popular vote. The question is, can Harris win the popular vote by enough, given the known propensity of voting coalitions within the country, to be sure of carrying enough Electoral College votes to prevail?

That's unclear, in part because it appears that a couple of things have happened since 2020. One is that Donald Trump is doing much better than any Republican in a long time with Blacks. That's not saying that he's going to win Black voters; he's going to lose Black voters by a massive, massive amount.

But typically, Republicans lost Black voters by eighty points in the Obama era. They lost them by as much as ninety points in 2008. The polling averages right now suggest that he will lose them by sixty-five to seventy points.

Okay, that doesn't sound like a lot. Trump is still losing big among this group of voters. But, Georgia was decided by three-tenths of a point in 2020, and 29% of voters in Georgia are African American. Shave Biden's margin with Blacks, or now Harris's margin, from ninety to eighty points, even if not a single voter of another race changes their vote, and Georgia flips from Democrat to Republican. The same is true in Pennsylvania, where, depending on how many African Americans vote, the demographic makes up somewhere between 8% to 11% of voters. Shave the Democrats' winning margin with Blacks by 10% and suddenly Pennsylvania becomes a toss-up even if nobody else changes their votes.

This analysis applies in every swing state but one: Arizona is the only swing state where Blacks are less than 5% of the electorate.

The second new factor regards the Latino vote. Latinos have traditionally, in the modern era, been another Democratic -tinged group, which the party's candidates usually win by thirty-five or forty points nationally. Right now, the polling average has Harris ahead by only about fifteen points among Latinos.

Latinos are also broadly present in the swing states. Latinos are five to ten percent of the electorate in North Carolina, Pennsylvania, Georgia, and Wisconsin. Twenty percent of the Arizona electorate is Latino. Close to 15% of the Nevada electorate is Latino. Decreasing the Democratic margin in those states from 2020's 23 points to a mere 15 flips Arizona and makes the other states toss-ups or Trump-leaning.

Now combine the effects of lower Democratic margins among both groups at once. That would flip from every state from Democrat to Republican and keep North Carolina red. However, these changes will also reduce the gap between the Electoral College outcome and the national popular vote because there are lots of Blacks and Latinos who live in non-swing states.

Trump may do better among Latinos in Texas. He's going to carry Texas anyway. Repeat this in deep red and deep blue states nationwide and the gap between the popular vote and the Electoral College outcome would likely shrink. Nate's model says it is roughly around 2.4 or 2.5%. – that's the margin Harris has to win the popular vote by to have an even shot of winning the Electoral College.

If Harris carries the popular vote by less than that, she stops being the favorite to win the Electoral College. If she wins by more than that, she's a lock to win the Electoral College.

What's saving Harris right now? She is gaining votes among whites with a college degree, which is also a growing share of the electorate. Getting a larger share of the vote among that growing segment of

the electorate is helping to prop Harris up. That almost balances Trump's gains with non-whites, but the polls show that Harris is not winning by the 2.5 points she needs.

Some individual polls have her winning outside of that margin. A poll released within the hour before I came to Juniata College, sponsored by the Morning Consult, has her up by three points, but most polls do not. The high-quality Pew Research poll that surveys over 88,000 people, one of the largest samples of any poll, has the race tied. Last month, before her convention, *The New York Times* and a college poll had her up by one point. Now, they have Trump up by one or two points, depending on how you round it. Something to consider is that the average polling lead Harris has (although you can find polls outside of that) tends to have her up by about one to two points.

If Harris is up by one to two points, the odds that she wins the electoral college are not nothing, but they are less than 50%.

Where do we go from here? There are a couple of factors that may favor Harris and a couple of factors that may favor Trump. For Harris, the Democratic advantage among Black voters is long-standing. It's entirely possible that the closer we get to the election, their flirtation with Donald Trump will fade. It may be that instead of winning Black voters by eighty-one points, what Biden won by nationally in 2020, Harris will win Black voters by seventy-six. Not as good, but not as catastrophic as if she wins Black voters by seventy points.

That's something that her campaign is trying to deal with. She went to southeastern Georgia a few weeks ago on her bus tour. In an area that backed Donald Trump, her campaign told the press, she is going to fight for every vote. They noted this is an area that backed Donald Trump. She nonetheless made three stops, all of them in Black areas. Harris knows what she needs to up their enthusiasm and bring that vote home.

Then you have Harris and the topic of abortion. Her support for abortion rights is unlikely to convince the one-third of Republicans who are pro-abortion rights to switch parties. However, the issue can motivate Independents and marginally attached Democrats who might not be crazy about Harris, but care about abortion, to vote for her. The topic of abortion will probably be a benefit to her, but the question is how much of a benefit will it be. Some states have an abortion referendum or measures on the ballot, and when there is a specific measure for something that animates a group, the less attached voters who support that message will often come to the polls.

This happened with George W. Bush in 2004 when his campaign put an anti-same-sex-marriage referendum on the ballot in Ohio. It helped boost rural turnout and helped Bush beat John Kerry in that crucial state in 2004. There are abortion rights referendums on ballots in at least two of the swing states, Arizona and Nevada. That's a factor that could help Harris.

The third factor that could favor Harris, but depends all on her, is that she remains the less well-known candidate. Not to say that people don't have an opinion of her; most people do, but it is less firmly fixed than people's opinions on Donald Trump.

One of the *New York Times* polls asked people how firm they are in their opinion of the two candidates. Concerning Trump, around 90% of people responded "Yes, I know enough about Donald Trump to know my opinion." Only about 70% or so of people said that regarding Harris. That means there's a chance for people's opinions of her to go up, and there's a chance for them to go down.

Does that 20% to 30% of people have some opinion about her? A lot of these people probably do. We know that about 12% to 15% of the electorate said in July they had an unfavorable opinion of her and today have a favorable opinion. That switch may not be solidified yet, though. That makes tomorrow's debate quite important because it will be Harris's first opportunity to make her case directly to voters, not indirectly through the media, advertisements, or surrogates. People can see her in the flesh for two hours answering questions, and then make an assessment.

This is a huge high-risk, high-reward opportunity for Harris. You never get a second chance to make a first impression, and this is Harris's first impression moment for many people because swing voters tend not to tune into conventions. They may have seen or heard about the speech she delivered at 9:30 or 10 o'clock on the last night of the Democratic Convention, but most swing voters wait for something like the debate to make a judgment.

Those are the factors that move in her favor; what factors that weigh against her? The most important is her role in an administration whose head, Joe Biden, remains the most unpopular president at this stage of a first-term presidency in history. Biden is even less popular than Donald Trump at the same stage of his presidency in 2020. People don't like the direction that the country is going in. Many people who voted for Biden, not a huge number, but enough, don't like the direction the country's going. Some of those people don't like it enough that they're either undecided or will vote for Trump. This is one factor that Trump will play on and that works in his favor. You don't like what happened, she was part of what happened, therefore, don't vote for her.

Again, I'll quote from the *New York Times*-Siena poll, which asked people which candidate represents a major change, minor change, or pretty much the same. For Trump, 53% of respondents said he represents a major change from the status quo. Less than 50% said that Harris represents a minor or a major change, and roughly 50% said that she represents continuity. When the respondents were asked what they wanted, over half of them said they wanted major change.

That background is unfavorable to her, which is one reason why she's been talking about being an agent of change. She's been emphasizing what she would do differently than Biden because without

disowning the administration that she's part of, she is very unlikely to win. She is in effect saying, "I'm not just a continuer of the status quo. I am somebody who will bring us to a new future."

Another factor that weighs against her very slightly is the deep fear of Republican voters. Republicans right now are likelier to vote than are Democrats. If Harris manages to make up that enthusiasm gap, this won't be a significant break against her. But if enthusiasm wanes the slightest for her, the Republicans will have an enthusiasm gap that in a very close election, could be the difference. If 75% of Republicans vote versus 73% of Democrats, it's not that big of a deal. But a 75% versus 67% difference, which is how it was leaning when Joe Biden was running, can be the determining factor. Harris needs to make a case that she's somebody who represents the values of America, and who will not simply continue the Biden administration.

Harris may need to break more from the Biden administration as we get closer to election day. In 1968, Hubert Humphrey, the vice president for Lyndon Johnson, desperately wanted Johnson to change his Vietnam War policy. He was unwilling to criticize the President and demand he change policies, and Humphrey did not get a cessation of the bombing of North Vietnam until two days before the election. Many people think if the cessation happened a week before, Humphrey would've beaten Richard Nixon in the election. Joe Biden is probably not going to make a major policy change, but Harris may be in a position where she has to say, I supported what we did, but the circumstances now dictate that if I occupy the Oval Office, I will make a different decision.

There are other known unknowns, which are not too difficult to figure out. Donald Trump is always one moment before a microphone away from a damaging verbal statement. In his performance in the first debate against Joe Biden, he threw away what he had been gaining in favorability with more petulant, arrogant displays of rude, boorish behavior. Trump could do that again tomorrow, he could do it on a stage, and we know that drives soft supporters of his away. Donald Trump has never had a 50% job approval rating or a 50% favorable rating from the American people during his time in public life. He's the only man in the history of polling to be elected to the presidency without hitting a 50% favorability rating in a polling average. Today, Trump is at his highest mark, about 45% to 46%, but that's not 50%.

If Harris can consolidate the 52% who have an unfavorable opinion of Trump, obviously 52 beats 46 by more than two and a half points and she's the president. Her problem is she's not doing that. She's not doing what Joe Biden did, convert Trump's 52% to 53% unfavorable rating into a 52% to 53% favorable rating for Biden. Trump's proclivity for self-wounding is a known unknown and that could work in her favor.

International situations can work in either direction. A sudden international crisis that appears to or does risk American security is obviously a bad factor for a member of an incumbent administration. But the flip side is also true: if an international crisis arises and Biden is able to rise to the occasion and

resolve it successfully, that can run to his benefit. When Barack Obama succeeded where George W. Bush had failed and had Osama bin Laden captured and killed, it produced a short bump in the polls.

The Cuban Missile Crisis, which was John F. Kennedy's greatest moment as president, occurred in the two and a half weeks before the 1962 midterms in the middle of October 1962. People thought that the world may be destroyed by the end of October. After realizing the world had been saved, they went out and voted a week later; it's hard to imagine that that didn't help Democrats. One of the best performances by an incumbent president in their first midterm came in 1962. That is, until Joe Biden managed to beat that being more unpopular and yet do better relative to expectations than John F. Kennedy did. If there is a brokered peace in Ukraine on October 30th, that could really help Harris. These are known unknowns. We have no idea if they will happen, but we know they could happen, and they can impact the results.

The economy is a big known unknown. We are unlikely to see a significant change in employment, and without that small change tend not to move voters. Similarly, we could have a stock market decline, but that tends not to move people as long as it's not accompanied by an employment decline. One can't rule out the possibility of an international crisis creating a shortage of a particular good that drives inflation, or unemployment, or something else. If something dramatic happens with the economy in October, that could affect the election. What if there's a terrorist attack, and so forth.

Most of these factors are risk factors that are slightly negative for her. But again, if Biden successfully rose to the moment, that could help an incumbent administration and help, if not the president, the person in line to succeed the president. If Biden were to have the stock market drop and then the market jumped back up within a couple of weeks, in a race this close, that could produce enough favor to boost her. These are the known unknowns.

As we go into the race, we have to understand that not only is the country divided roughly fifty-fifty, but it is also divided fifty-fifty along lines where the people who are in part of each 50% increasingly see the other 50% as dishonorable. A pollster asked Harris voters, how do you see people who voted for Trump? And they asked Trump voters, how do you see people who voted for Harris? Does the other side simply disagree? Or are they people with fundamentally different values? 80% of both sides saw the other group as people with fundamentally different values. That's not how the American people saw each other in the 1950s, '60s or '70s. With that level of animosity, whoever wins a narrow election will face about half of the country who is not only unhappy that you won but is also fearful and angry about it.

That poses a great opportunity for somebody to heal those divisions as Thomas Jefferson did after the bitter election of 1800. The Federalist Party and Jefferson's Democratic-Republican Party were evenly matched in 1800, but the Democratic Republicans had a wide lead by 1804 because of how

Jefferson dissolved and diffused the tension. Don't diffuse the current tension and you haven't seen anything yet regarding what will happen in two or four years from now.

That's the way I see the presidential race unfolding. I would not be surprised by a Harris victory, and I would not be surprised by a Trump victory. I won't put money on the race or predict it either way, but I may give a slight edge to Trump for the reasons I stated.

What does that mean for Congress? When I was young, we had split ticket voting, voting for people of different parties up and down the ballot. Somebody may have voted for Ronald Reagan for president, voted for a Democrat for Senator, voted for a Republican for the state representative, and voted for an Independent for their city council. Consequently, individual branding mattered a lot. Split ticket voting was a dominant feature of American politics throughout the '80s, '90s, and the '00s. When a candidate of a certain party won the presidency, candidates from the opposing party would win other seats, often by large margins.

When Barack Obama won the presidency, Democrats still held seventy to ninety House seats that John McCain had carried. The same thing held true in the Senate. We have Obamacare because of Democratic senators in Arkansas, Louisiana, Nebraska, South Dakota, and North Dakota, deeply red states where Democrats could win because of split-ticket voting and their personal brand.

What's happened in the last decade as animosity has risen? Split ticket voting has plummeted. In the last two presidential races, only one senator has won a state that was not carried by a candidate of their party.

When we look at the Senate map, the Republicans will likely control the Senate regardless of what happens at the presidential level, simply because there are more Democratic senators representing states that Donald Trump won by between eight and thirty-eight points than there are Republican senators up for states that Joe Biden won. In fact, not a single Republican senator is up in a state that Joe Biden won. So, Republicans currently have forty-nine seats. Joe Manchin retired rather than face West Virginia voters, and everyone is conceding that seat to the popular Republican Governor Jim Justice, which would bring Republicans to fifty. In Montana, John Tester has never gotten a majority of the votes but has won two terms with plurality votes in a state that Donald Trump will carry by between fifteen and twenty points. Almost every poll has him behind already. In 2020, the popular Democratic then-governor of Montana, Steve Bullock, who had won with crossover Republican votes and was up in polls, lost by 10 points; in the end, Republican voters returned to vote for the Republican even if they had voted for Bullock before.

Assuming those two races hold, Republicans win fifty-one seats in the Senate. Republicans holding fifty-one seats would not mean they necessarily have the ability to pass an agenda. There are certainly some moderates like Lisa Murkowski of Alaska, who was elected as a nominal Republican.

Susan Collins of Maine is also a moderate who could hold up a conservative agenda. Maine is a state that hasn't voted Republican for president in many, many decades. But that still constitutes control of the Senate.

Other states are up in the air, like Pennsylvania. Here, unless there is a major personal development in the race, we can expect the Senate race to largely follow the presidential race. This is what happened in 2016, when people thought Pat Toomey was going to lose. Donald Trump won Pennsylvania narrowly and Pat Toomey won Pennsylvania narrowly, too, basically with a 97% similar coalition.

Ron Johnson of Wisconsin was considered a dead-bang loser in 2016. Donald Trump surprisingly won the state, and Ron Johnson also won. This dynamic will play out in five swing states this year: Wisconsin, Michigan, Nevada, Pennsylvania, and Arizona. Democratic Senate candidates tend to run a point or so ahead of their presidential candidates. So, if Trump wins Pennsylvania by half a point rather than one and a half points, that could be the difference between Senator Casey and Dave McCormick being elected. In Wisconsin, it could be the difference between Eric Hovde and Senator Baldwin. In Nevada, it could be the difference between Sam Brown and Senator Rosen.

There's only one state where the candidate persistently brings her own negatives and brings her own bull to the China shop. I'm talking about Kari Lake in Arizona, who has such a persistent, personal, negative brand that she runs substantially behind the president. Most Republican candidates in the Senate races who are running behind the President are not yet as well-known as Trump. As they become more well known from television advertising, one should expect their poll ratings to go up. Lake is as well-known as Trump. She's largely disliked and she's running well behind Trump. Trump would have to win Arizona by probably five points or more to be able to drag her over the line.

The House is a totally different matter. We have the fewest number of house districts, at least in a century, where people represent a district that was carried by somebody from the opposite party in the last presidential race. What that means, Republicans being in the majority, is that they have more exposure. There are only five Democrats currently representing a seat that Donald Trump won. There are over twenty Republicans representing the seat that Joe Biden would want. Control of the House is highly likely to depend on how the popular vote goes in particular regions of the country. If Harris wins the popular vote by two points, but narrowly loses the Electoral College, that might be enough to give Democrats control of the House.

They only need to gain five seats. It's entirely possible that the Democrats could achieve that with the map that we use and with the collapse of split ticket voting. The House really is a coin flip. It's entirely plausible that we have a Democratic House, but a Republican Senate and a Republican president.

What I'd like to conclude with, though, is how perilous the times we live in are. When people within a nation tend not to just disagree about politics but really hate the other side, republics start to fray. To be fellow citizens, you must see each other as fellow citizens. You must see someone as having something in common with you that transcends political disagreements. In ancient times, Thucydides wrote about the collapse of many Greek city states into civil war because people saw themselves as either being part of the property class or the unpropertied class. We see this happen in the religious wars of Europe; if you can't see a Protestant or a Catholic as a fellow citizen, you can't have a free government. It happened in the Civil War when one side decided they could not continue to condone slavery, and slaveholders believed they could not live in a republic without slavery. We're not going to have a civil war, but we could have an erosion of norms that makes one side, or arguably both sides, more afraid of losing their rights, which raises the possibility of political overreach and political violence. Desperate people do desperate things.

The question I would pose to you is: no matter how deeply you feel about different political rights, about different political outcomes, is the alternative, the prospect of what might happen if those passions continue to be stoked, worth the opportunity of winning? Is the pain worth the gain? That's the question Americans need to be asking themselves more. If the pain isn't worth the game, maybe we need to rebuild that civic trust that makes a republic possible, and that might be more important in the long run than the victor of one election.