

## Cozen Currents: Separating Signal From Noise in Tonight's Results



Howard Schweitzer

CEO, Cozen  
O'Connor  
Public  
Strategies

hschweitzer@cozen.com  
Phone: (202) 912-4855  
Fax: (202) 640-5932

### Related Practice Areas

- Government Relations - Cozen O'Connor Public Strategies

### The Cozen Lens

- Early clues from Election Night will help guide an understanding for how the midterms will unfold and what those results will mean for the political and policy worlds moving forward.
- The Keystone State will again be a key state in this year's election with a tight Senate race and several toss-up contests for seats in the House.
- Arizona offers a case study of key demographics and political dynamics relevant to the midterms.

### How to Watch Election Night

**The Midterm Dynamics to Watch.** As voters head to the polls today, there are several storylines about the state of the American electorate that could receive greater clarity by actual vote counts.

- Voters are upset and they are expressing that frustration with elevated enthusiasm and elevated early voting turnout. The Trump era high turnout elections looks like it will continue into 2022.
- Democrats and Republicans look to make inroads on gains from 2020. Will Democrats continue to gain in Sun Belt suburbs, like Arizona's Maricopa County and the Atlanta metro area? Will Republicans continue to gain among minority populations, like Latinos in South Texas and South Florida and Asian Americans in California's Orange County?
- How the midterms unfold will help refine an understanding of whether the fundamentals or candidate quality matters more, if ticket splitting still exists, and if debates impact elections.

**The Midterm Bellwethers to Watch.** The first polls close in Indiana and Kentucky at 6:00 pm ET. The vote counting isn't expected to be as hectic as in 2020, but the full results will take days to tabulate. Meanwhile, there could be early clues on how the night will unfold.

- Look to the Virginia suburbs for early clues for the House. VA-02, held by Rep. Elaine Luria, and VA-07, held by Rep. Abigail Spanberger, are two seats won by Democrats in the 2018 blue wave. Republicans are looking to retake the districts. If Republicans win the toss-up district of VA-02, they will have a good night. If they win the Democratic-leaning district of VA-07, they will have a great night. If Democrats hold both districts, it could be a good night for them.
- Look to New Hampshire and Georgia for early clues for the Senate. The Granite State expects to have 100 percent of its vote counting completed tonight, providing clues to a Senate race that's Democratic leaning but could be competitive if Republicans are having a good night. Georgia's Senate race is a toss-up, and despite the large absentee vote, Georgia election officials have improved vote counting from 2020.
- There could still be long and contentious counts. Arizona, Nevada, and Pennsylvania all have competitive Senate races that could take days to tabulate. California and New York could also take time to tabulate absentee ballots for key House races, statewide races, and ballot measures.

**The Midterm Aftermath to Watch.** Just as there will be a race to win the votes, Democrats and Republicans will race to spin the results to their advantage.

- Most importantly, the results of the midterms may remain suspended for about another month. If no candidate receives at least 50 percent of the vote in the Georgia Senate race,

there will be a runoff on December 6th. Depending on how the other races go, that runoff could once again determine control of the Senate.

- Poor midterm showings usually force a pivot by the incumbent president. If Democrats lose control of one or both chambers, President Biden may shift to the center as he runs for reelection.
- A good midterm showing for the GOP will be the prelude to President Trump announcing another presidential run later this month. Trump is already trying to bully potential rivals, like Governor Ron DeSantis (R-FL), and wants to cut off any competing momentum after DeSantis' own likely reelection tonight.
- The midterms today will influence leadership races and the lame duck legislative session for the rest of the year. A good Republican night rewards current leadership and bolsters leverage in year-end negotiations. A good Democratic night means a stronger hand in reaching a compromise with Republicans on appropriations, nominations, and potentially even the debt limit.

## Purple Pennsylvania

**A Race for Senate Control.** By nearly all accounts, the Keystone State's open Senate race between Lieutenant Governor John Fetterman (D) and Mehmet Oz (R) is a toss-up that will be pivotal in determining which party controls the upper chamber.

- One of the defining issues in this race has been candidate quality. Thanks to the early image that Democrats were able to paint of Oz, he has a very high unfavorable rating. However, the very favorable environment for Republicans he is running in could save him.
- Fetterman is also not a perfect candidate, and has been seen as especially flawed after his shaky performance in the recent debate. Since his stroke, Fetterman has not been a constant public figure and the debate is viewed as being a major drag on his public perception.
- The result of this race very well will not be known this evening as state officials work to count mail-in ballots and the results could be challenged in court, depending on how close the tally is.

**A Democratic Slam Dunk.** Unlike the Senate race, the one for the governor's mansion between state Senator Doug Mastriano (R) and state Attorney General Josh Shapiro (D) is trending the Democrats' way.

- Mastriano has remained consistent on his aggressive MAGA/religious ideology and continued to advance right-wing conspiracy theories throughout the general election. Mastriano's campaign is choosing to instead rely on the letter next to his name over the substance of his platform.
- With Shapiro a likely winner, a major question will be how well that success carries over to Fetterman. While the Senate race is expected to be the closer of the two, this is in part due to a belief that there will be ticket splitting, especially in the Philadelphia suburbs where Shapiro supporters may also vote for Oz. A wider margin of victory for Shapiro may suggest that Fetterman may be able to lose these voters and still emerge the winner.

**Toss-Ups Abound in House Races.** As is to be expected in a purple state like Pennsylvania, there will be several tight races for positions in the House of Representatives.

- Pennsylvania's 7th Congressional District in the Lehigh Valley features a rematch of the 2020 race that was won by Rep. Susan Wild (D) over Lisa Scheller (R). Wild won by only 3.8 points, less than Biden's margin of victory in the district. In addition to a poor macro environment for Democrats, redistricting has meant that it has become slightly more favorable for Republicans.
- The race in Pennsylvania's 17th Congressional District in the Pittsburgh suburbs has no incumbent as Rep. Connor Lamb (D) stepped down after running for the Democratic nomination for the Senate. The district is one of a handful in PA that voted for Trump in 2016 and Biden in 2020. Redistricting is seen as having made it slightly more Democratic, which could be the push needed for Chris Deluzio (D) to claim victory over Jeremy Shaffer (R).
- While the GOP is expected to reclaim the House majority, the outcome in toss-up races like these two where Republicans are aiming to pick up a previously Democratic seat will be pivotal in determining the size of that majority, which in turn, will impact anticipated House

Speaker Kevin McCarthy's (R-CA) room for maneuverability.

## The Grand Canyon State Shines a Light on America's Political Chasm

**Arizona's Competing Demographics.** Arizona is a microcosm of some notable demographic trends with major implications for US politics.

- One of the biggest political stories of the Trump era has been the shift of suburban voters towards Democrats. In 2018, 38 of the 41 GOP-held districts that flipped to Democrats were suburban. Suburban voters were responsible for delivering the White House to President Biden in 2020.
- Arizona is home to fast-growing suburbs. Maricopa County, which includes Phoenix, grew by 671,405 residents between 2010 and 2021 – over 75 percent of the state's total population increase during this period. Biden was the first Democratic presidential candidate to win Arizona since Bill Clinton in 1996 and the first to win Maricopa County since 1948. Tonight's results could indicate whether suburban voters will continue turning out for Democrats without Trump in office.
- Another major political development from 2020 was the GOP's improving performance among Latino voters. Between 2016 and 2020, President Trump increased his share of the Latino vote by eight points. Latinos amount to 32.3 percent of Arizona's population. Results from Arizona's competitive races this year could show whether this trend from 2020 holds.

**Arizona's GOP Veers Right.** Arizona Republicans offer insight into the direction of the GOP after Trump.

- Arizona is known for electing Republicans outside of the party's mainstream. Conservative Senator Barry Goldwater (R), who lost to President Lyndon Johnson in a landslide in 1964, hailed from the Grand Canyon State, as did the late Senator John McCain (R), who cultivated a reputation as a "maverick." Today, all four of Arizona's GOP House members belong to the far-right Freedom Caucus, including Rep. Andy Biggs (AZ), who served as the chairman.
- GOP candidates running for Arizona's three major statewide races have all embraced Trump's falsehoods about the 2020 presidential election results. Kari Lake, a former TV news anchor, has made election denial a cornerstone of her gubernatorial campaign, as has Mark Finchem, a state representative who is running for secretary of state. Finchem is a member of the Oath Keepers, a far-right extremist militia group of which 11 members, including the leader, have been indicted by the Justice Department for charges relating to the January 6, 2021 attack on the US Capitol. Venture capitalist Blake Masters has also echoed this theme in his Senate bid.
- If these three candidates win, it could cement Trump's election denialism as a feature of the GOP platform. Goldwater, though initially on the fringe, ultimately paved the way for the Reagan Revolution and a conservative turn in the GOP. All three have a chance to win.

**Arizona's Democratic Party Tries to Find Its Footing.** Arizona Democrats are navigating a tricky balance as they seek to defy midterm history, which favors the party that doesn't control the White House.

- The economy and the border are political weaknesses for Biden's party, so Democrats have focused on an issue where they can go on the offense in the Arizona Senate race: abortion access. Democrats have spent almost \$10.3 million on ads relating to abortion, while Masters has walked back his initial position of a total ban to one after the first trimester. Kelly has pledged to codify *Roe v. Wade* in federal law. Election results in Arizona could indicate to what extent abortion remains a top political issue in a swing state in a post-*Roe* world.
  - While Senator Mark Kelly (D) has largely supported most aspects of Biden's legislative agenda, his fellow Senator Kyrsten Sinema (D) has built a political brand out of being a thorn in the president's side. If Kelly loses, Democrats could see Sinema's position as the most viable way to run as a Democrat in a historically red state, taking the wind out of the sails of potential 2024 primary challengers like Rep. Rubén Gallego (D). If Kelly wins, however, that could make Sinema more vulnerable in a primary next election cycle.
-