

## *To Hawthorn Friends & Family - -*

Your requests (o.k., from a couple of you who are true junkies) for more frequent comments on the campaigns are flattering (and belie “election exhaustion” which I am afraid will become terminal, between Trump’s tweets and Bloomberg’s ads) but I try not to repeat what you’re otherwise hearing . . . and nearly everything that could be said IS being said by someone.

But for those who are still looking for another perspective on last night’s New Hampshire results and the upcoming events, here are a few observations – perhaps more questions than conclusions – from the west bank of the Potomac (aided enormously by folks we’ve been talking to on the ground in “real America,” especially in Iowa, New Hampshire, South Carolina, and Nevada):

### **Is It ‘Bye-‘Bye Biden?**

It may have been almost 400 years since John Dunne wrote,

*“ . . . send not to know for whom the bells tolls, it tolls for thee.”*

but it is timely for the Biden campaign.

Fifty years after he became a member of the New County Council in Delaware, I hear the bells tolling for Joe Biden’s career, encompassing 36 years in the U.S. Senate, eight as Vice President, and an ill-advised final run for the White House.

Once this year’s front-runner in national and most state polls, Biden finished a poor fourth in the **Iowa** Caucuses, winning only a handful of delegates (six to be precise, compared to Pete’s 13 and Bernie’s 12), and last night finished a miserable fifth in the **New Hampshire** Primary, receiving at last count 8.4% of the vote and NO delegates.

Biden faces increasingly daunting challenges:

- Having fled in retreat to **South Carolina** before the polls even closed in New Hampshire, if to protect his “firewall” in South Carolina Biden spends most (or even a lot) of the next 17 days there, he puts at enormous risk his prospects in Nevada’s caucuses (February 22) and the 14 states (including California, Texas, North Carolina, Virginia, and Connecticut) set for Super Tuesday, March 3.
- Polling we’re seeing suggests that the Biden South Carolina “**firewall**” – built on African-American support – is cracking (tho’ not yet collapsing), with Blacks voters, especially younger, moving away from Biden. Tom

Steyer is making a concerted – and well financed effort – to win Black support in South Carolina.

- Even if he does win South Carolina, he then has only two days for the hard-earned (and over-rated) vaunted “momentum” to help him on **Super Tuesday** in California, Texas, etc.
- And while Biden – supported by the “Old Guard” of the Nevada political establishment – has strong support of unions in Nevada, whose members fought hard for healthcare benefits they don’t want to lose under Sanders’ and Warren’s Medicare-for-all approaches, the massive culinary union has not endorsed yet.

Further, USA Today’s early January Nevada poll had Biden up on Sanders by only one point, a lead that must have been damaged by Iowa and New Hampshire results.

- Biden also has serious **money** troubles. He ended 2019 with \$8.9 million cash-on-hand, compared to Sanders’ \$18.3 million. Biden supporters in South Carolina are now regretting the \$900,000 his SuperPAC spent on television in New Hampshire, following \$8.4 million on his losing Iowa effort. One thing is for sure: nothing about his Iowa and New Hampshire performances are going to help his short-term fundraising.
- Reports from “on the ground” in Iowa suggest Biden, in person, looked bad: older, more frail and more uncertain than he does on television. His modest-sized crowds were described as “loyal, respectful and quietly waiting for his appearances.”

### **Nothing Good has Happened for Elizabeth Warren**

As Bernie has gone from strength to strength, Sen. Warren slipped from third in **Iowa** (18%) to a distant fourth (9.3%) in her neighboring **New Hampshire**.

She is hemorrhaging **money**. Her acclaimed field organization (which so far has produced only those third and fourth place finishes) is now more than 1,100 staff personnel whose payroll must be met weekly. In December she spent about \$3.2 million on staff salaries.

She’s looking to do well in **Nevada** . . . in large part because of her field organization (from which six minority women publicly resigned last week because of bad treatment) and in what her campaign keeps claiming is potential support from the culinary unions (who oppose her approach to healthcare).

She is going to have to face an unpleasant reality.

## How Likely is a Bernie Nomination?

While it may horrify the Democratic establishment, a Bernie nomination is not only NOT unthinkable, but increasingly possible, at a stretch maybe likely (depending on how Bloomberg does on Super Tuesday).

Writing in the wee hours of this morning, **Nate Silver** was already speculating that their model, once additional results and polling were added, would show a significant up-tick for Sanders . . . as well as for a contested convention. And he has raised almost \$200 million from more than 1.5 million individual small-dollar donors who have made more than five million donations.

I found fascinating an analysis by **Mike Allen** on Axios this morning:

“Some top Democrats tell me that if the split 2020 field persists through Super Tuesday, Bernie Sanders could build an insurmountable delegate lead while the moderates eat each other up.

- Why it matters: With California's massive delegate trove as part of Super Tuesday on March 3, whoever winds up as the survivor against Sanders could be in a deep delegate hole by the time the field thins.

A Democratic campaign shared these scenarios to argue Sanders could walk away from Super Tuesday in control:

- Scenario #1: Bernie's Super Tuesday vote share is five points ahead of the second candidate (say, 30% to 25%). Bernie would net 96 delegates more than the next-highest-performing candidate. At that point, it would be possible but difficult to overtake Sanders: To become the nominee, that survivor would need to beat Bernie by an average of 53% to 47% in remaining contests.
- Scenario #2: Bernie's Super Tuesday vote share is 10 points ahead of the second candidate (say, 30% to 20%). Bernie would net 198 delegates more than the next-highest-performing candidate. Overtaking Sanders would be unlikely: The field would need to clear, the and survivor would need to win each remaining contest on average 55% to 45% over Bernie.
- Scenario #3: Bernie's Super Tuesday vote share is by 15 points ahead of the second candidate (say, 35% to 20%). Bernie would net 328 delegates more than the next-highest-performing candidate. The race would be all but over.

A veteran Democratic operative told me: "Obama showed in '08 and Clinton showed in '16 [that] once you get a lead in the Democratic primary, it is very hard to lose it. Because we don't have winner-take-all states, the front-runner is always accumulating delegates."

- "Trump would not have been the nominee in '16 had the non-Trumpers consolidated. They never did and he got the nomination. We are looking at the same scenario."

### Or Has the Democratic “Left” Peaked?

Yes, after virtually tying Buttigieg in Iowa, Bernie did win **New Hampshire** (with Buttigieg close on his heels and Klobuchar not far behind), but his New Hampshire performance was less spectacular than predicted.

Sanders actually got only **half as many votes** in New Hampshire yesterday as he did in 2016. Admittedly it was a multi-candidate race this year versus a two-candidate race four years ago. Nonetheless, some 75,000 voters who supported Bernie in 2016 supported someone else this year.

Even among **young voters** – his most crucial base of support – Bernie’s sizable lead slipped. Among voters 18-29, Sanders won 83% in ’16 and only 51% yesterday. Among voters 30-44, Sanders won 66% in 2016 and 36% yesterday, with Buttigieg picking up a significant number of them.

And if one adds up the “**left**” votes cast yesterday for Bernie and Elizabeth Warren, they received (latest count) 102,871 votes while the combined “**center**” of Buttigieg, Klobuchar and Biden received 155,175.

### Can Klobuchar Seize the Moment?

Based on her VERY strong third place finish in New Hampshire – following her strong showings in the Iowa debate and caucuses – Senator Klobuchar’s star is rising. She raised \$2 million in 14 hours after the Iowa debate and \$2.5 million in just a couple of hours after the polls closed in New Hampshire.

But she has proudly run a “lean” campaign. Can she **staff** up in time for Nevada (10 days) and South Carolina (17 days)? While they didn’t make their first hires in Nevada until November, they DO have 50 staffers there. She just made her first **television** buy in the Silver State while others have been on for months. Can she **raise** the \$10-15 million needed for ad buys on Super Tuesday . . . some of whose states are already **early voting** (California started last week, the day of the Iowa Caucuses)?

Given her recent fundraising surges, she MAY have enough money to compete for Super Tuesday . . . but will she have it in **TIME**?

### What About Bloomberg?

We really won’t know until **Super Tuesday**. Clearly his massive spending has won him recognition and support at least IN the polls, if not yet AT the polls. In

Real Clear Politics' latest (pre-New Hampshire) national average of polls, Bloomberg has bought his way solidly into third place:

|           |      |
|-----------|------|
| Sanders   | 23.6 |
| Biden     | 19.2 |
| Bloomberg | 14.2 |
| Warren    | 12.4 |
| Buttigieg | 10.6 |
| Klobuchar | 4.6  |

**New Hampshire** will, of course, change that. As will Bloomberg's staggering **spending**. Since he announced November 24, through January, spending at something over \$35 million per week, he had spent almost as much on television as ALL the other candidates combined, including President Trump. His early January social media spending WAS more than all the other candidates combined, including President Trump.

But will it produce **real votes** in primaries and at caucuses? As noted, we won't know until the votes are counted March 3rd.

### Voter Interest/Enthusiasm

In a year when data and pundits are all predicting record turnout, after the lackluster turnout in Iowa (5,000 more caucus attendees than 2016 but some 62,000 LESS than 2008), New Hampshire's turnout is approaching 300,000 as final votes are counted, 253,062 in 2016 and 287,527 in 2008. That's the kind of heightened turnout we saw in "off year" 2019 elections in Louisiana, Mississippi, Kentucky and Virginia.

We will add to all this as I sense we have something to say that MIGHT be worth your time to read . . . including about **President Trump's** massive vote total in a virtually uncontested primary in New Hampshire, proof positive of the allegiance and active support of his base. We'll also provide an update on whether the **Nevada caucuses** February 22 will run into the "train wreck" of a reporting nightmare that happened in Iowa (and which we HAD predicted).

*John*