

Friday, December 18th, 2020

To Hawthorn Friends & Family -

As the holidays draw ever more nigh, it surely means the end of a year that, as Her Majesty once said, has truly been an “*annus horribilis*.” From pandemic, to riots, to recession, to one of the most divisive election campaigns ever, one can now only hope this year ends, as the late T. S. Elliott wrote, “*not with bang, but with a whimper*.”

We hope the year end finds you and your family well: healthy, safe, and reasonably sane.

Georgia Runoffs --

Of course, while the calendar year ends December 31, the elections aren't over until **Georgia's two U.S. Senate seats (and one Georgia Public Service Commission race)** runoffs are decided **January 5** (and, truly, until Joe Biden takes the oath of office January 20).

One of the best analyses of that complicated Georgia situation I've read is in **Larry Sabato's "Crystal Ball"** from the University of Virginia. Larry and his team are real masters at analyzing races. Last month they correctly called the presidential outcome in 49 of the 50 states, as well as the two separate congressional districts that have one electoral vote each, and got ranked #1 by the Harvard Political Review in predicting the Electoral College. It said, in part:

“For partisans, runoff elections are often about turning out the base — the venues where each candidate has campaigned illustrate this well. For their part, Republicans are working to turn out rural areas: Loeffler kicked off the start of the early voting period this week with an event in Rome, in the northwestern corner of the state, while Perdue rallied in Macon, an area where his political family has its roots. On the Democratic side, Biden headlined a drive-in rally in Atlanta this week, though Democrats are also hitting other metro areas. Ossoff recently appeared in Augusta, an region where Biden made some notable gains over past Democratic presidential nominees.

“The bottom line: This election is about as close as you can get. In November, polling-based aggregates were relatively accurate in Georgia — FiveThirtyEight's model, for instance, pointed to a narrow Biden win — and the polling we've had since then of the Senate races usually finds the contests within the margin of error. It's hard to tell who has the edge, but undoubtedly, the party that does a better job turning out the base will be the party that carries the day.”

[Here is Larry's and his team's latest on Georgia.](#)

In addition to sharing their analysis, I would only add that my recent comments have been:

1. I do think **BOTH races will go to the SAME party** (and that will dictate how **Bubba McDonald's PSC race** turns out). I just don't see voters choosing Osoff (D) AND Loeffler (R), nor Purdue (R) AND Warnock (D). Dr. Sabato noted in an email to me that the last time two senate elections held in one state on one day went to two different parties was 54 years ago, in 1966, in South Carolina, when Strom Thurmond (R) kept one seat while Fritz Hollings (D) barely won the other. I don't expect to see that repeated next month.
2. I think there is a **ceiling in Georgia** for a Black, liberal, Democrat preacher from the city of Atlanta . . . and that ceiling **is less than 50%**
3. Not original with me, but a comment from a colleague, Andrew Bemus, which I have been repeating, *"I think it is interesting **how the senate candidates compared to the presidential**. David Perdue ran 780 votes ahead of Trump. Jon Ossoff ran behind Biden by 99,988 votes . . . one would think this is Ossoff's death knell for the runoff."*
4. The **GOP is mounting a much more intensive grassroots effort** in Georgia for January than they did in November . . . at least in the Atlanta suburbs. If the GOP had done in Georgia what they did in Florida (and what the Democrats did NOT do in Florida), the GOP would have carried Georgia for Trump and Perdue.
5. The smartest political mind I know in Georgia is predicting a **turnout of about one million less voters** in January than in November. The question is, WHOSE million will it be? Will the GOP reject the legitimacy of the process and stay home . . . or turn out to avenge Trump's loss of Georgia to the "thieving Democrats" . . . or will the Democrats stay home because Trump isn't on the ballot . . . or turn out in record numbers (as early ballot requests seem to suggest) to legitimize their November victory and deliver the U.S. Senate to Democrats?

As of Wednesday (12/16), about 800,000 early ballots had been cast for the runoff, both via in-person and absentee. Monday, 12/14, was the first day of in-person voting. On Monday, 168,000 ballots were cast, compared to 128,590 on the first day of early in-person voting for the general election. On Tuesday, 165,000 votes were cast. So far, **1.2 million mail-in ballots have been requested**.

Between October 5 and December 7, there have been **76,000 new registered voters**, 56% of whom are **under 35** years of age.

6. **Is any polling to be believed?** The ones we've seen are neck-and-neck, with a slight advantage to Republicans. But after the polling disasters of November (the polls could not have been MORE wrong about the close Senate and, even, House races), I'm not sure there is a poll I'd readily believe.

Imponderables from November --

Among the "imponderables" from November on which we are "pondering" are:

- **Punditry (ours included)** – How could so many have been so wrong about so much?

U.S. Senate races that were supposed to be close weren't. In **Maine**, Susan Collins won re-election by 8.6 points while Trump was losing the state by 9.1 points, a 17.7 point difference. In **Iowa**, Joni Ernst – predicted throughout the campaign to be tied or behind (tho', admittedly, the Iowa Poll finally got the outcome right on the eve of the election) – won by 6.6 points. In **South Carolina**, Jamie Harrison spent \$108 million to lose by 10.1 points. In **Kansas**, the Democrat out-raised her opponent more than four-to-one, only to lose by 11.4 points.

In the **U. S. House**, Democrats were supposed to gain five to 15 seats. Instead, they LOST 12 seats.

In **Texas**, Democrats were supposed to have a shot at taking control of the State House of Representatives. Net, they didn't gain a single seat (each side flipped one). How must polling/analytics change to produce more reliable results?

- **Perfect Senate Wave** – With the exception of the two Georgia races still in runoff (in which the Republicans lead in the latest polls), **ALL the close/"toss-up" Senate races went Republican: Maine, North Carolina, South Carolina, Iowa, and Montana.** Democrats won the three "lean Democrat" races they were supposed to win – **Michigan, Colorado and Arizona** – and nothing else even arguably close (**Mississippi, Kansas, Texas**, etc.).
- **House Republican Triumph/Democratic Vacuum – Not a single incumbent House Republican lost. And of the Republican challengers who won Democratic seats, every single one of them was a woman and/or minority.**

Pelosi may have a bare majority, but her years are coming to an end. At the end of the next congress, she will be 82. Steny Hoyer will be 83. Jim Clyburn will be 82. While Progressive Democrats like AOC can cry out for new Democratic leadership, it isn't there.

- **Atypical California Voting** – America’s “bluest” state, looming over the “left coast,” did not vote entirely as might have been expected. Yes, Biden carried the state 63.5% to 34.3%. But an attempt to repeal restrictions on affirmative action failed. Rent control failed. Protecting workers in the “gig” economy failed. And a tax increase on commercial property to fund teachers and schools failed. A recall petition for the Democratic governor is in the works and, with sufficient funding, will force a recall election.
- **“Divided We Stand”** – To historic divides of race, party, age, and affluence, we see increasing divides of gender, education, and urban/rural. People increasingly listen to only “echo chamber” news, confirming what they already believe. Mutual respect and a belief in bipartisan cooperation no longer exist. Both comity and civility are increasingly things out of an ancient past. Public confidence in the integrity of the election process is in ever shorter supply.

A Season Whose Memories are Bittersweet, too --

As we always do at year’s end, we reflect on the good friends we’ve lost over the last year, including in 2020:

James Kiss, long-time devoted chair of Hawthorn’s Advisory Board, whose always wise counsel dated back 40 years to Matt Reese’s day

Peter Stickles, for many years Hawthorn’s able and unflappable Vice President for Research Services, whose research skills found their best use at the horse tracks

Ralph Murphine, in recent years a Hawthorn advisor in Latin America, in early years an invaluable personal mentor at Matt Reese & Associates

Andy Savitz, admired colleague, Massachusetts political expert and environmental leader

Elmer Harris, CEO of Alabama Power and who, as Hawthorn’s first client, put the company in business and kept it in business for many years

With Best Wishes of the Season --

Whatever holiday you may celebrate we hope is a happy and healthy one. We wish for you this holiday season, as we do every year, in the immortal words of Charles Dickens: “*And so, as Tiny Tim said . . .*”

‘God bless us, every one!’”

***John . . . and Suzanne, Larry, Dr. John,
James, Bryant, Angie, Henry, Ellen,
Sloan, Jared, Scott, Frank, Andrew,
Liam, Olivia, Charlie, Anthony, Carlos,
Charles, Janice, Donald, Amanda***