



Voters to Washington in 2018:

## **“Focus on OUR Concerns”**

An analysis of the 2018 Midterm Elections

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## Key Takeaways

- This was not a base election. Independents decided the outcome, breaking for Democrats by 12 points.
- Turnout was higher, but the ideological/party composition remained basically the same. Women and young voters made up the same percentage of the electorate as in previous elections.
- The key to the election was voter groups changing vote preference almost across the board, especially Independents, as Republicans saw significant losses in the suburbs and in rural areas.
- According to ideology and party ID post-election data, there was no radical realignment to the Left. America remains a center-right country.
- The state of the economy had the potential to be the most powerful message, not healthcare, with 68% of voters calling the economy excellent or good, an improvement from 2016 when only 36% called it excellent or good.
- Republicans were not able to capitalize on the economic opportunity by educating the electorate on what was in the tax cut bill and how it was helping them and their families. Only 32% of voters believed the bill reduced tax rates for everyone. Those people who said it would lower their taxes voted Republican 73-26.
- The combination of the immigration and the caravan issues dominated the Republican economic message voters heard by a 2:1 margin.
- The focus on the immigration/caravan issue instead of the positive jobs report in the last days of the campaign had a net result of late deciders breaking for Democrats by 12 points.
- Republicans missed an opportunity to win because they were not able to make the number one issue – the economy – the number one issue.

## Overview

The 2018 midterm elections, for Republicans, is a story of missed opportunity. Holding the House was a tall order with history against the GOP as the party in power and the large number of Republican retirements. But a path to preserving their House majority, even if a difficult one, did exist if the election became all about the economy. It didn't.

This post-election analysis, based on exit poll data from the National Election Pool, done by Edison Research, and the Winston Group's Winning the Issues post-election survey, done Election Night, assesses the 2018 campaign that began and ended with the fight for the election narrative.

There is no question that money was a significant disadvantage for Republicans in this election, but this report outlines the opportunities that existed which could have led to a much better result for them, especially in terms of what the electorate heard from both Republicans and Democrats. This report also shows that the election outcome was not the result of an ideological or party identification realignment, but instead a shift in vote preferences. This means that Republicans still have an opportunity to rebuild their majority coalition for 2020.

## The Missed Opportunity

The Friday before the 2018 midterm elections, Republicans were handed a gift in the form of the October monthly jobs report. Described by a former economic advisor to then-Vice President Joe Biden as "pretty much everything you could want in a monthly jobs report," it was a clear sign that Republicans' center-right economic policies were moving the economy forward, impacting not just job growth, but finally in this report, wage growth as well. And the timing couldn't have been better, coming just four days before the election.



This moment was potentially the culmination of the fight for the narrative of the election. Democrats had been focused on the issue of health care most of the year, raising concerns about increasing costs and the Republican move toward a state-based approach to pre-existing conditions. Democratic leaders had been careful to avoid both the hot button issue of impeachment and the equally awkward subject for them of the growing economy.



Over the year, Republicans had made some efforts to create a focus on the economy; but, as the election drew near, they found themselves embroiled in less positive issues, immigration and the caravan story. That bifurcation diminished the impact of the “good news” economic report that should have dominated the final days of the campaign. Instead, Republicans, as they did throughout the campaign, muddled the economic message in two ways.

First, Republicans too often put the tax cut debate in the context of Nancy Pelosi, rather than telling voters what was actually in the tax bill and how the legislation would help voters and their families. Then, the closing focus in the final days of the campaign was on the immigration/caravan message, popular with the base and those at President Trump’s rallies but also controversial and divisive, particularly with Independents. The people who made their decision over the last few days voted Democratic by a 12-point margin.

Republicans had just gotten a jobs report that validated Congress’ most important accomplishment of the previous two years, the tax cut bill, and were not able to capitalize on the late-breaking opportunity to impact late deciders. Instead of getting a gift, Republicans lost that opportunity and along with it, the majority in the House.

## Three Strategic Uncertainties

Going into the fall election, there were three strategic uncertainties in play. First, historically, the party holding the White House tends to lose a significant number of House seats in the first midterm elections of a presidency. Would history repeat itself and would Trump’s low job approval impact the outcome? He won the presidency in 2016 with remarkably high negatives, but how would those negatives impact the Congressional elections?

The second factor was what role would an improving economy play in how the electorate would make their choice for Congress. Presiding over a strong economy in 1998, President Clinton was able to buck the trend of the party holding the White House losing seats. But in 2018, with almost half the country saying they were living paycheck to paycheck, voters were still cautious about their economic future.



The last uncertainty was turnout. Would we see the increased turnout that played a role in off-year special elections also impact the 2018 elections? If so, would that increase come from specific voter groups or be more broad-based?

The context for these three strategic factors was a country that was extremely divided, driven by harsh political discourse, a contentious media, and a mostly negative tone in campaigns. The post-election data gives us some answers.

## Presidential Job Approval

Historically, when a president's disapproval has exceeded approval, it has negatively impacted their party's midterm performance. President Trump, however, was elected with 60% unfavorables, and Republicans won key Senate seats in Ohio, Wisconsin, and Pennsylvania. The question early on then was how much impact Trump's negatives would have. Overall, could he push them into better political territory?

It was certainly possible for a President to have negative personal favorable-unfavorable numbers, yet manage to improve their job approval and get a positive midterm outcome. In the 1998 election, according to the exit polls, President Clinton's favorables were 35% and his unfavorables were a remarkably high 61%. However, his job approval was positive at 55% approve and 43% disapprove. Some 20% of the electorate approved of the job he was doing but had an unfavorable view of him. Among those voters, Democratic Congressional candidates won 62-35. Overall, 28% of those unfavorable to Clinton voted for the Democratic candidate for Congress. Democrats picked up five House seats.



As 2018 progressed, there was slight improvement in President Trump's job approval as it exceeded 40%. But an important dichotomy began to emerge. While Trump's overall job approval inched toward 45%, his disapproval remained over 50%. His job approval on handling the economy, however, was another story as this number improved, going over 50% while his economic job disapproval dipped to the low 40s.

So, the question was whether people would vote on his economic job approval or his overall job approval. Choosing the immigration message rather than the economy, especially the last weekend, led voters to move their emphasis from the President's economic performance to his overall job approval – the wrong direction for Republicans.

## The Potential of Economy, Jobs, and Taxes

In this election, the electorate believed the economy was excellent or good (68%), rather than not so good or poor (31%) according to the exit polls. This was a major improvement from 2016 when only 36% believed it was excellent/good and 63% saw it as not so good/poor.

Among those believing it was excellent/good, Republicans won 60-39. Among those who saw it as not so good/poor, Democrats won 83-14. However, isolating those who said the economy was “good” as opposed to “excellent,” Republicans only won these voters 51-47. Those saying the economy was only “good” made up a 51% majority of the electorate.



The inability to translate the economic gains into meaningful, personal terms for voters was a major shortcoming for Republicans. They lost the House this year despite a remarkable unemployment rate and a strong economy because they didn't make the number one issue their number one issue. The data shows the economy/jobs issues came in third in terms of what voters heard from Republicans.

What the GOP had was a “failure to communicate” with voters on what was in the tax cut bill that impacted them personally against the backdrop of Democrats and the majority of the media telling them the bill was “only for the rich.” The Winning the Issues post-election survey found that while voters favored the tax cut bill 45-31, with Independents favoring it 41-33, there was still a significant knowledge gap. More people believed the bill would not lower taxes for “people like them” 36-42 (will-will not). Independents were even more inclined to think it would not lower taxes for them (30-43).

Voters believed the tax cut bill reduced rates for corporations and the wealthy (67-17 believe-do not believe) but not that it would reduce rates for everyone (32-50 believe-not believe). Independents were less likely to believe it reduced rates for everyone (27-51).

Clearly, the electorate was not aware of the basic elements of the bill, and naturally as a result, were unaware of the potential benefits at risk. So, when Republicans said Democrats were going to take away their tax cut, only one-third of the electorate thought they had something to lose. Ironically, the electorate did believe the statement that Democrats would raise taxes (53-30 believe-do not believe). This was not a surprise to them.

If a majority of voters had understood that the tax cut bill was going to lower taxes for them, this would have decisively helped Republicans. Those people who said it would lower their taxes voted Republican 73-26. But with the focus being on what the Democrats would take away rather than

what the tax cut bill accomplished for individuals and families, the electorate never had a clear understanding of its worth to them, and with it the value of the signature accomplishment of the Republican Congress.

## The 2018 Electorate

On Election Day, about 117 million people voted. That turnout was well above the recent midterms of 2010 (91 million) and 2014 (83 million). It was also still well below the 2016 Presidential year turnout of about 139 million. Given the increased turnout seen in the 2017-18 special elections, a higher turnout in 2018 was expected; but the make-up of this electorate was similar to recent Congressional elections in most respects.

There was no significant political realignment to the Left.

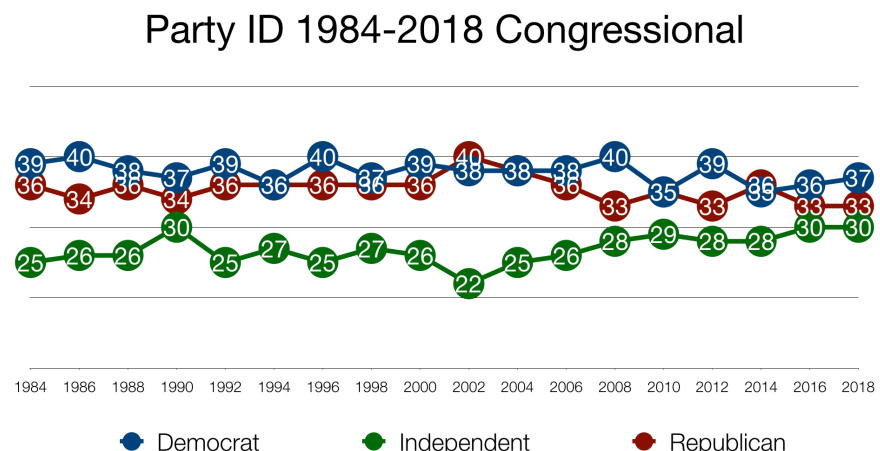
### Party Identification

In terms of the partisan composition of the electorate, party ID was +4 for Democrats nationally. This is slightly better for Democrats than previous recent midterm elections. In 2010, party ID was even, and in 2014, it was +1 for Republicans. However, in the last two Presidential elections, Democrats had a +6 advantage in 2012, and a +3 advantage in 2016; and Republicans held the House both times winning 234 seats in 2012 and 241 in 2016.

Overall, the 33% mark for Republicans isn't particularly unusual, although recently, we have only seen it in Presidential years (2008, 2012, and 2016). It does, however, reflect the lowest level going forward from 1984. For Democrats, their 37% puts the party in the mid-range of results they've seen since 1984.

More interesting is Independents' party ID weighing in at 30% in back-to-back elections, reflecting an upward trend since 2002. In the last six elections, Independents have made up 28% of the electorate or greater. Both party bases turned out and got overwhelming percentages of their party's vote: Republicans at 94-6; Democrats at 95-4.

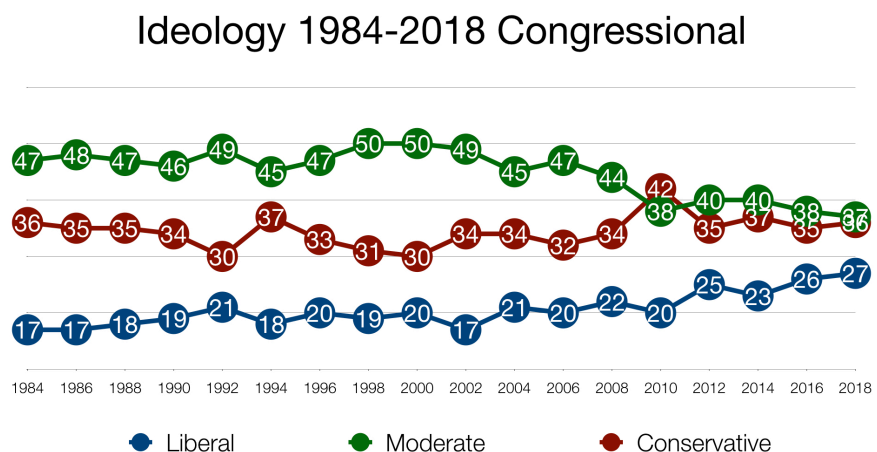
But the most important take away from this data is that neither party's base is large enough to produce a winning majority.





## Ideology of the electorate

While the data show some continued uptick in the percentage of self-defined liberals (27%) as part of the electorate, there was no major ideological shift since the last election. Moderates' share of the electorate continued its downward trend at 37%, its lowest point over the period of 1984 to the present. Meanwhile, conservatives held about the same percentage (36%), as they have over the past several elections. This means the electorate is still center-right, with moderates still being the largest group, and conservatives outnumbering liberals by a significant margin.

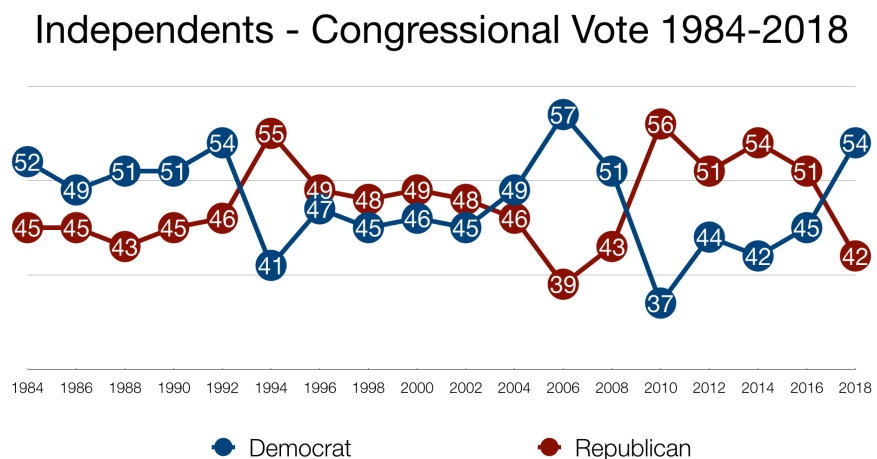


## Key Demographic Group Turnout

In the months leading up to the election, several demographic and geographic groups and their potential impact were the topic of conversation. These included Independents, women, voters 18-29, minorities and suburban voters.

### Independents

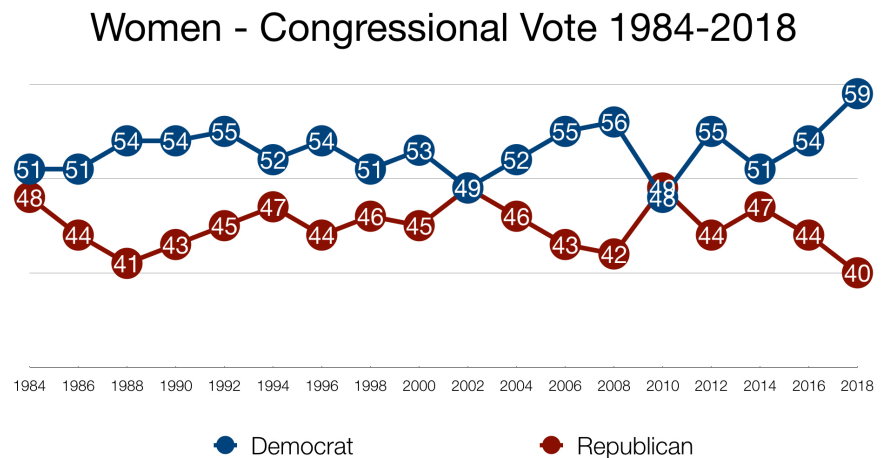
Independents, who made up 30% of the electorate, broke for Democrats by 12 points, the same margin by which Republicans won them in 2014. This was the first time since 2008 that Congressional Democrats won Independents. However, the 2018 margin was not as large as the Democratic margin among Independents in 2006 (+18), nor the Republican wins among Independents in 2010



(+19) and in 1994 (+14), the last three times the House has switched hands. This means the current Congressional Democrat majority does not start in as strong a position as previous newly elected majorities.

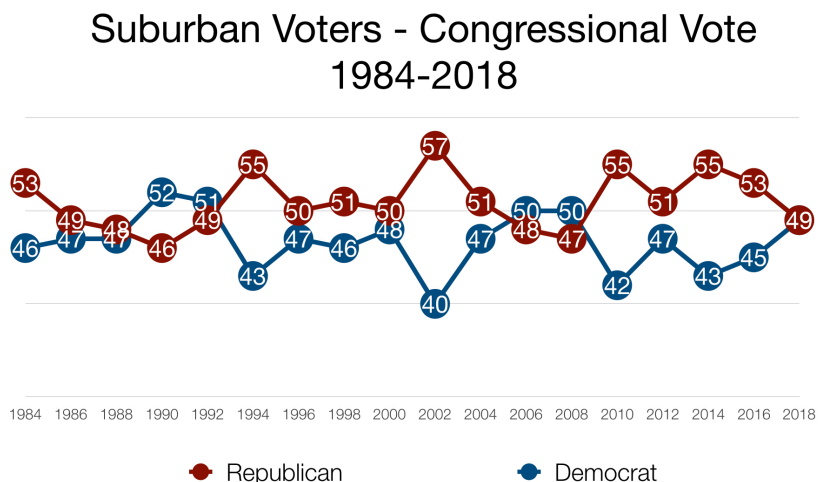
## Women

Women continued to make up a majority of the electorate. At a national level, their percentage of the electorate overall did not increase from 2016 at 52%. This election, however, produced the largest vote margin among women (+19 in exit polls) for Congressional Democrats in recent history, surpassing the 2008 election results that favored Democrats by 14. It is important to note that men, however, were not the mirror opposite of women in this election. Republicans only won them by 4.



## Suburban Voters

While there has been significant discussion about suburban women, in fact the suburban vote shift came from both men and women. Suburban women went from favoring Republicans by five in 2010 to favoring Democrats by eight in 2018 - a change of 13 in the margin. Suburban men went from favoring Republicans by 23 in 2010 to favoring Republicans by only 10 in 2018, also a change of 13 in the margin - exactly the same as suburban women. The biggest change came among suburban Independents who went for Republicans by 25 in 2010; but in this election, went Democratic by 6, a 31-point change in the margin in favor of Democrats.



Younger voters in midterm elections have typically made up about 12%-13% of the electorate, and this election was similar, with 13% of the electorate 18-29. Minorities did increase slightly from previous midterms, specifically the Hispanic vote, which rose from 8% in 2010 and 2014 to 11% this year, similar to the 2016 Presidential election.

While the turnout of these groups did increase significantly, their percentage of the electorate remained basically the same. What changed was their vote preference.

## Key Changes in Vote Preference

This was not a base election — this was about the middle and Independents. As shown in the chart below, the 2010 Republican majority coalition fell apart across almost every demographic group, numbers that should set off alarm bells for the GOP.

While there were many groups that shifted, the one that clearly stands out is Independents. In the 2018 election, Republicans lost them by 12. This was a dramatic shift from 2010 when they won them by 19, a central component of winning back the majority that year. That margin held in 2014 as Republicans won 247 seats, the largest number since the 1920s.

Coalition	Percentage of Electorate	2006 R-D Margin	2010 R-D Margin	2014 R-D Margin	2018 R-D Margin
Independent	30	-18	+19	+12	-12
College Degree/Advanced Degree	41	-7	+8	+3	-20
30-44	22	-8	+4	-2	-19
18-29	13	-22	-13	-11	-35
Women	52	-12	+1	-4	-19
Seniors 65+	26	0	+21	+16	+2
Hispanic	11	-39	-22	-26	-40
Suburban	51	-2	+13	+12	0

There are other groups that could also be on this list. For example, in 2010 Republicans won small city and rural Independents by 27 points; and in 2018, Democrats won them by 2.

The question is what pushed these voters to shift so dramatically? What we found was a significant level of consistency across these groups in terms of what they said in relation to their priorities, what they heard from Republican and Democratic candidates and their reaction to it.

# What the Electorate Heard and Didn't Hear Drove the Shift

## Issue and News Story Importance

To get a handle on message impact, the Winning the Issues post-election survey asked voters to rate a list of issues and news stories on a scale of 1 to 9, with 1 being not important at all to their vote decision and 9 being extremely important. The top four were household issues relating to personal economics and health care, specifically the economy and jobs, cost of living, Affordable Care Act/health care, and pre-existing conditions. Not surprisingly, those were also the top four for Independents as well. Immigration came in fifth, overall, which is also where Independents rated the issue.

In the next chart, the color-coding represents significant differences in how Republicans, Democrats, Independents and the overall electorate defined the importance of these issues/news stories relative to the importance they placed on other issues/news stories in order to standardize the differences. Green represents issues/news stories that were rated by that group one standard deviation higher than the overall mean for that specific group, and red represents results that are one standard deviation lower. In basic terms, if the issue/news story is in green it is in a group's top 16% of concerns. If in red, it was in the bottom 16%; the rest were in the middle.

Republican voters focused on the economy and jobs as well as immigration. Immigration came in two options: the overall issue and the immediate situation of the caravan. However, while immigration was a major concern for Independents, it was not one of their top issues, and the caravan was farther down the list.

For Democratic voters, the top two issues/stories were health care/ACA and the need for a check and balance on President Trump. While pre-existing conditions was very high up the Democrat list, many Democrats defaulted to the broader issue/story of health care and placed the stronger emphasis there.

Independents agreed with Republicans that economy/jobs was critical and made it their top issue/story as well. They placed more significance on cost of living, putting it second in importance. While Independents agreed with Democrats about the importance of health care, they were more focused on pre-existing conditions and saw that as the central element of the health care issue.

One additional note about Independents and health care issues. They put pre-existing conditions and health care high up their list, but when it came to single payer/Medicare for all, that was a separate issue that was much farther down their list of priorities.

In terms of news coverage, the media did not prioritize the the issues Independents cared about. In the later months of the campaign, the news stories that usually got the most attention from the media – harassment of Trump officials, mail bombs and Russia – ranked 18<sup>th</sup>, 19<sup>th</sup> and 20<sup>th</sup> respectively on Independents' rankings.



Issue/News Story Importance in Deciding How to Vote — Rank Order of Importance	Total	Republican	Independent	Democrat
Economy and Jobs	1	1	1	9
Cost of living	2	5	2	6
Affordable Care Act/health care	3	13	4	1
Pre-existing conditions	4	10	3	3
Immigration	5	2	5	14
Gun policy	6	7	7	5
Foreign policy/Terrorism/ISIS/situation in the Middle East	7	4	6	13
The tax cut plan recently passed by Congress	8	8	8	11
Confirmation of Supreme Court nominee Brett Kavanaugh	9	6	12	17
Trade/tariffs/NAFTA	10	11	10	15
Recent shooting at a synagogue in Pittsburgh	11	15	14	7
Border security/Caravan coming up through Mexico	12	3	11	18
Need for a check and balance on the President	13	19	9	2
Whether a candidate supports President Trump	14	12	16	16
Single payer health care/Medicare for All	15	16	15	8
Issues related to women, such as equal pay, contraception issues, and the MeToo movement	16	18	13	4
Mail bombs sent to CNN and Democratic officials	17	17	19	12
The implications of Nancy Pelosi becoming Speaker	18	14	17	19
Harassment against Trump administration officials and Republicans	19	9	18	20
Allegations of Donald Trump ties to Russia	20	20	20	10
Green represents results that are one standard deviation higher than the mean of all the issues/stories for the specific group and red represents results that are one standard deviation lower.				

## What Voters Heard Most from the Candidates

From the issue/news story list, we asked voters which issues they heard the most about from Republican candidates and from Democratic candidates. Voters heard an immigration and border security message from Republican candidates that ultimately overwhelmed the economic message, while the message from Democrats was more diffused but had a significant focus on health care.

### Republican Message

The issue/news story that voters heard most from Republican candidates was immigration (19%) followed by the border/caravan (15%) and then economy/jobs (15%). Everything else was in low single digits. This means that the combination of immigration and the border/caravan message (34%) dominated the Republican economic message (15%) by 2:1. The Republican message was muddled, giving Democrats the opportunity to increase the electorate's focus on health care. As a result of what they heard from Republicans (no matter what specifically they heard), voters were slightly unfavorable to voting for the Republican candidate (43-48 more-less favorable), with Independents being even less favorable (36-48).

The chart below depicts how voters reacted to the specific message they heard from Republican candidates and how that affected their vote for Congress. For example, among those voters who heard an immigration message from GOP candidates, 35% were more favorable as a result, while 59% were less favorable. Likewise, 44% of this group voted for the Republican candidate, while 56% voted for the Democrat.

Issue/news story heard most from Republican candidates (5% or above)	Percent Heard	More-less favorable to GOP candidates based on what they heard	R-D Vote
Immigration	19	35-59	44-56
Border/caravan	15	30-63	34-65
Economy/jobs	15	76-16	73-19
Whether a candidate supports Trump	5	30-68	26-74
Confirmation of Brett Kavanaugh	5	46-45	43-57

Looking at how the Republican message was received by party, Republicans were very favorable to the Republican message about immigration (82-13 more-less favorable), with Independents being unfavorable 2:1 (29-58 more-less favorable). Similarly, Republicans were very favorable to what they heard from Republicans about the border/caravan (77-21), with Independents being unfavorable 28-47. However, economy/jobs was the message component that was received favorably by Republicans (92-0) and Independents by almost 3:1 (66-26). Only a small percentage

said that what they heard most from Republicans was about Kavanaugh, with Republicans being very favorable (81-10) and Independents being evenly split (43-45).

Issue/news story heard most from Republican candidates (5% or above)	More-less favorable to GOP candidates		
	Republicans	Independents	Democrats
Immigration	82-13	29-58	0-97
Border/caravan	77-21	28-47	4-94
Economy/jobs	92-0	66-26	39-54
Whether a candidate supports Trump	87-13	13-87	13-83
Confirmation of Brett Kavanaugh	81-10	43-45	10-85

## Democrat Message

The issue/news story voters heard most from Democratic candidates was health care (ACA, 12%; pre-existing conditions, 7%; single payer/Medicare for all, 6%). Based on what they heard from Democrats (no matter what specifically they heard), 50% of voters were more favorable to voting for Democratic candidates and 40% were less favorable. Independents split evenly 43-43. Among voters overall, health care messages were received favorably. Among those who heard an ACA/healthcare message from Democrats, 66% were more favorable to the Democratic candidate (25% less favorable), while 71% voted for the Democrat in the Congressional race and 28% voted for the Republican candidate. Those who heard about pre-existing conditions were more favorable by a margin of 63-24. Immigration was also a positive message from Democrats (55-37). However, the Democrat message about Trump ties to Russia was negatively received (28-64), as was their message about Kavanaugh (37-52).

Issue/news story heard most from Democratic candidates (5% or above)	Percent Heard	More-less favorable to Dem candidates based on what they heard	R-D Vote
ACA/health care	12	66-25	28-71
Allegations of Trump ties to Russia	7	28-64	69-31
Pre-existing conditions	7	63-24	31-69
Immigration	7	55-37	35-65
Single payer/Medicare for all	6	50-46	52-46
Confirmation of Brett Kavanaugh	6	37-52	68-32
Whether a candidate supports Trump	5	38-50	44-56
Need for check and balance on the President	5	59-34	34-66

Looking at reaction to the Democratic message by party, health care messages were viewed favorably by their base and Independents (ACA/health care, 65-24 among Independents; pre-existing conditions, 57-30 among Independents). In contrast, Democrat candidates' message about immigration was seen very positively by Democrats (91-8), but negatively by Independents (24-46). This was also true of their discussion of Trump ties to Russia (81-19 among Democrats, 24-76 among Independents). Additionally, their message about Kavanaugh was a positive among their own party's voters (92-0), but a negative among Independents (21-58).

Issue/news story heard most from Democratic candidates (5% or above)	More-less favorable to Dem candidates		
	Republicans	Independents	Democrats
ACA/health care	15-78	65-24	90-2
Allegations of Trump ties to Russia	0-80	24-76	81-19
Pre-existing conditions	23-63	57-30	84-3
Immigration	20-75	24-46	91-8
Single payer/Medicare for all	17-83	41-47	97-3
Confirmation of Brett Kavanaugh	20-71	21-58	92-0
Whether a candidate supports Trump	12-88	28-50	75-12
Need for check and balance on the President	0-100	43-45	87-5

## Key Voter Group Reaction

One would expect base voters in both parties to view their parties' key messages favorably and they did. Republicans liked the immigration issue; Democrats liked health care and anti-Trump messaging.

What was surprising, however, was the similarity in the views of both parties' messages by key demographic/geographic voters who helped determine the election: Independents, women, and suburban voters. They all saw the immigration issue as the Republicans' top message and the Democrats' as a health care message. They liked one; the other was not favorably received.

While the margins varied, generally these three groups, as seen in the following charts, were less likely to vote for a Republican candidate with a message focus on immigration and the caravan and much more favorably inclined toward the economic message.

They were more favorably disposed toward Democratic candidates who focused on the ACA and pre-existing conditions. Single payer as part of the health care message was not favorably received. Additionally, when they heard from Democrats on the issues of Kavanaugh and the Russia investigation, that generated a less favorable view for their candidates.



The data show the economy could have been a winning issue for the GOP. Instead, the Republican immigration message was not only poorly received by voters, it overshadowed what could have been much more positive economic message for Congressional Republicans.

Voter Group	Party	Top Four Issue/News stories	Percent Heard	More-less favorable to Party candidates
Independents	Democrats	ACA/health care	12	65-24
		Allegations of Trump ties to Russia	10	24-76
		Pre-existing conditions	9	57-30
		Single payer/Medicare for all	8	41-47
	Republicans	Economy/jobs	18	66-26
		Immigration	17	29-58
		Border/caravan	11	28-47
		Confirmation of Brett Kavanaugh	6	43-45
Women	Democrats	ACA/health care	11	61-29
		Allegations of Trump ties to Russia	7	30-67
		Need for check and balance on the President	7	64-31
		Pre-existing conditions	7	55-21
	Republicans	Immigration	18	35-59
		Border/caravan	18	32-62
		Economy/jobs	15	80-18
		Whether a candidate supports Trump	6	29-68
Suburban	Democrats	ACA/health care	14	54-33
		Allegations of Trump ties to Russia	8	24-67
		Pre-existing conditions	8	54-24
		Immigration	6	57-34
	Republicans	Immigration	19	34-60
		Economy/jobs	18	79-12
		Border/caravan	15	28-67
		Confirmation of Brett Kavanaugh	6	45-41

In contrast, the Democratic message was more muted. While people did hear a focus on health care, it was nowhere near the levels they had heard from Republicans about immigration/caravan,

and barely outpaced what they had heard from Republicans on economy/jobs. Additionally, the Democrats were slightly bifurcated on health care as well. If voters thought they were hearing about the ACA or pre-existing conditions they had a positive response. If they thought it was about single payer or Medicare for all, voters were split.

But, muted or not, it was enough to win.

## Time of Decision-Making

In the weekend leading up to the election, the focus was on the caravan and immigration instead of the economy and jobs. Unlike 2016, in which late deciders broke in favor of President Trump, late deciders in 2018 broke more heavily for Democrats, particularly among those who decided “in the last few days” (+12D among this group). This accounts for some 8% of the electorate, with another 8% saying they made their decision “in the last week” (this group was more evenly split in their vote preference, 48R-49D). Majorities of those making their decision before the last week also voted for Democrats, but the margin in favor of Democrats was not as wide in these groups as it was among the latest of deciders. Among the 19% who made their decision in the month before the election, the margin in favor of Democrats was +5. Among the 63% who made their decision before that, the margin in favor of Democrats was also +5.

Time of decision-making	Percent	R-D Margin
In the last few days	8	41-53
In the last week	8	48-49
In the last month	19	46-51
Before that	63	47-52

## Conclusion

Despite the incredibly good monthly jobs report the Friday before the election and despite being able to expand their majority in the Senate, Republicans were unable to maintain their majority in the House. This midterm election will be remembered as a missed opportunity for Republicans with many lingering questions, the most important being: Can Republicans rebuild a majority coalition and regain the House?

History was against them this year, but the post-election data show the Republicans’ economic message was seen positively by a large majority of voters, more positively than the Democrats’ message. Republicans can take heart that their economic policies not only seem to be working; but when voters understood what was in the tax bill, they favored Republicans by a comfortable margin. The problem was only 32% of this year’s voters knew about the key provision in this important legislation or how it would positively impact them.

And that's where Democrats should be careful not to see this election as a major, permanent shift to the Left – a mandate for increasingly liberal policies. According to the post-election data, many groups moved toward Democrats in this election and the Republicans' double-digit losses of Independents and women are particularly worrying.



But the data does not show major changes in party ID or ideology that would normally accompany a significant political realignment. The country remains center-right in its views, and the Republican Party is the center-right party, particularly in contrast with a Democratic Party becoming even more liberal.

Shifts in voter preference can be short-lived as we saw going from 2006 to 2010. But Republicans need to address their value proposition to

the electorate in order to rebuild a majority coalition. In 2010, they focused on the question “Where are the Jobs?” and proposed a solution. That policy debate gained Republicans 63 House seats.

Going forward, what did this midterm's electorate say they were looking for? The post-election survey makes a strong case that voters want solutions designed to help people still living paycheck to paycheck. Voters' top four issues/news stories related to household and personal economics along with health care, but they were frustrated by campaign discourse that centered on the respective party bases and their issues. And we know that neither party's bases are large enough to form a winning majority coalition.

Republicans should refocus on the economy, their economic record and solutions to household issues as first steps toward rebuilding their majority coalition for 2020.

## Methodology

This analysis was based on data from the Winston Group's Winning the Issues post-election survey, conducted November 6, 2018 of 1000 registered voters who voted at the Congressional level. It also draws on exit poll data from the National Election Pool conducted by Edison Research of 18,778 voters who voted at the Congressional level.