THE U.S. MIDTERMS: WHAT HAPPENED AND WHAT IT MEANS FOR U.S. FOREIGN POLICY

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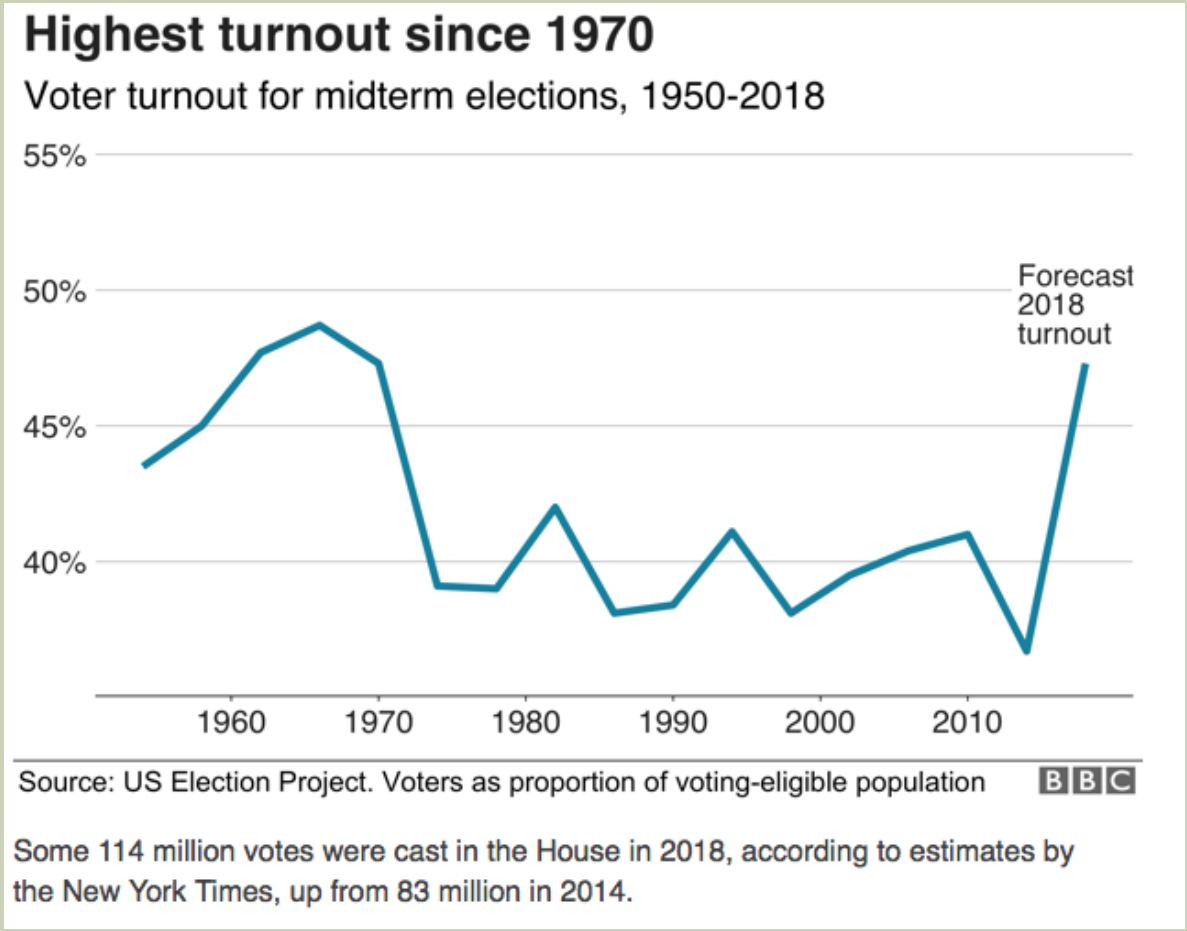
THE ELECTION: WAS IT A WAVE?

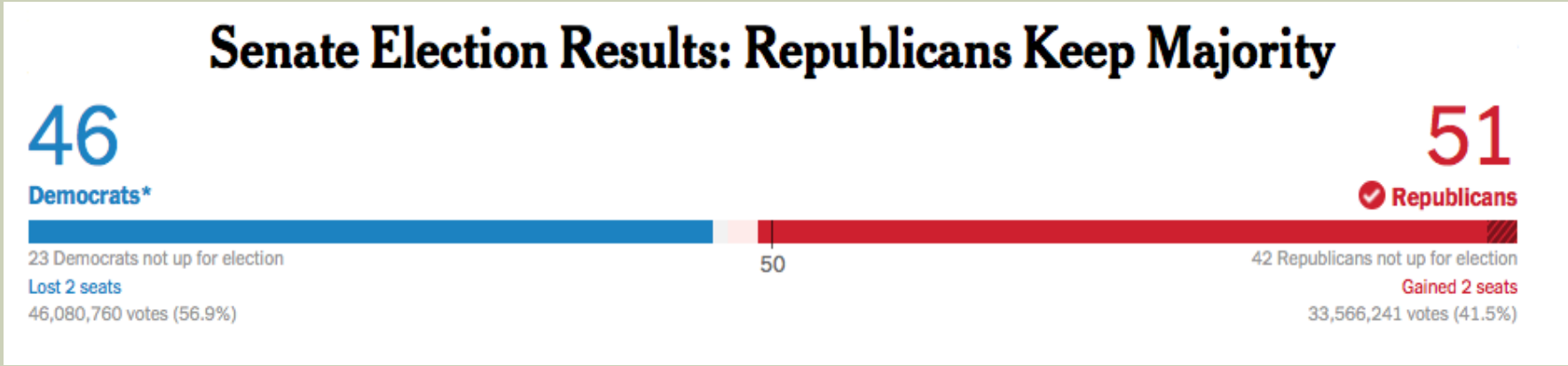
- The results in the House, Senate, Governors
- Who voted and why – what exit polls tell us
- Two Americas – the geography of the election
- What it tells us about 2020
- How Donald Trump understands the election results
- How the Democrats understand the election results

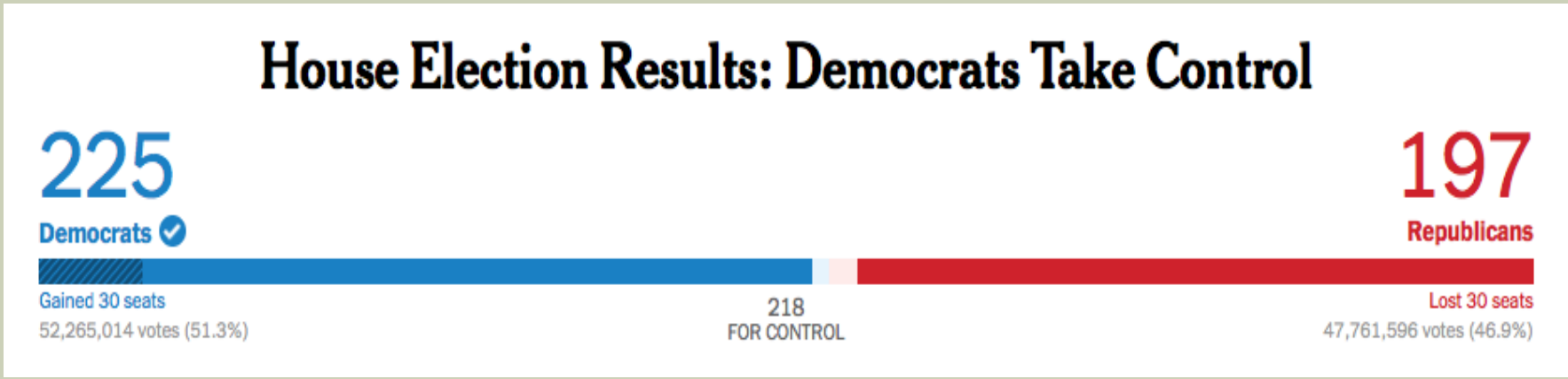
MASSIVE TURNOUT



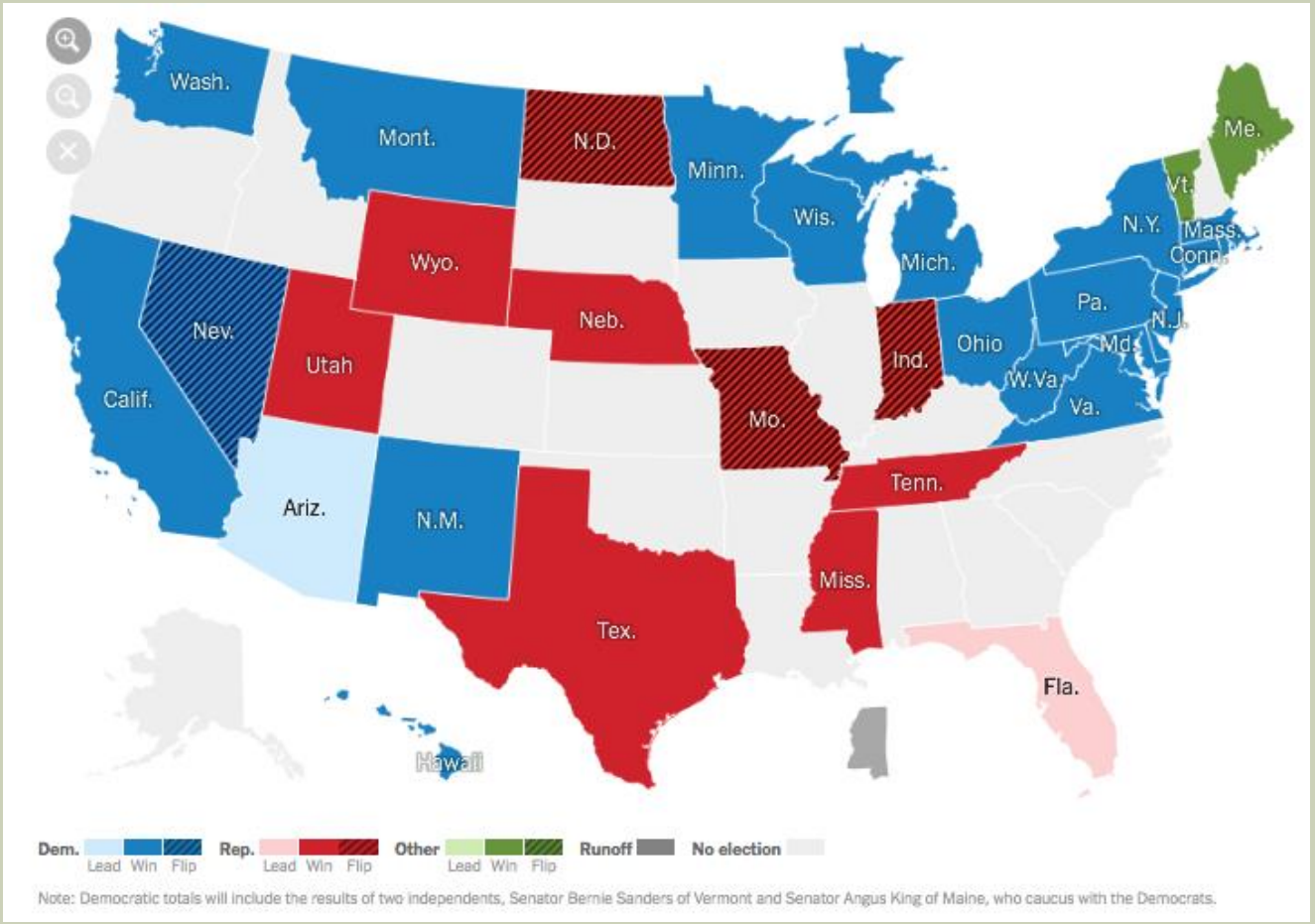
Some 114 million votes were cast in the House in 2018, according to estimates by the New York Times, up from 83 million in 2014.

SPLIT DECISION

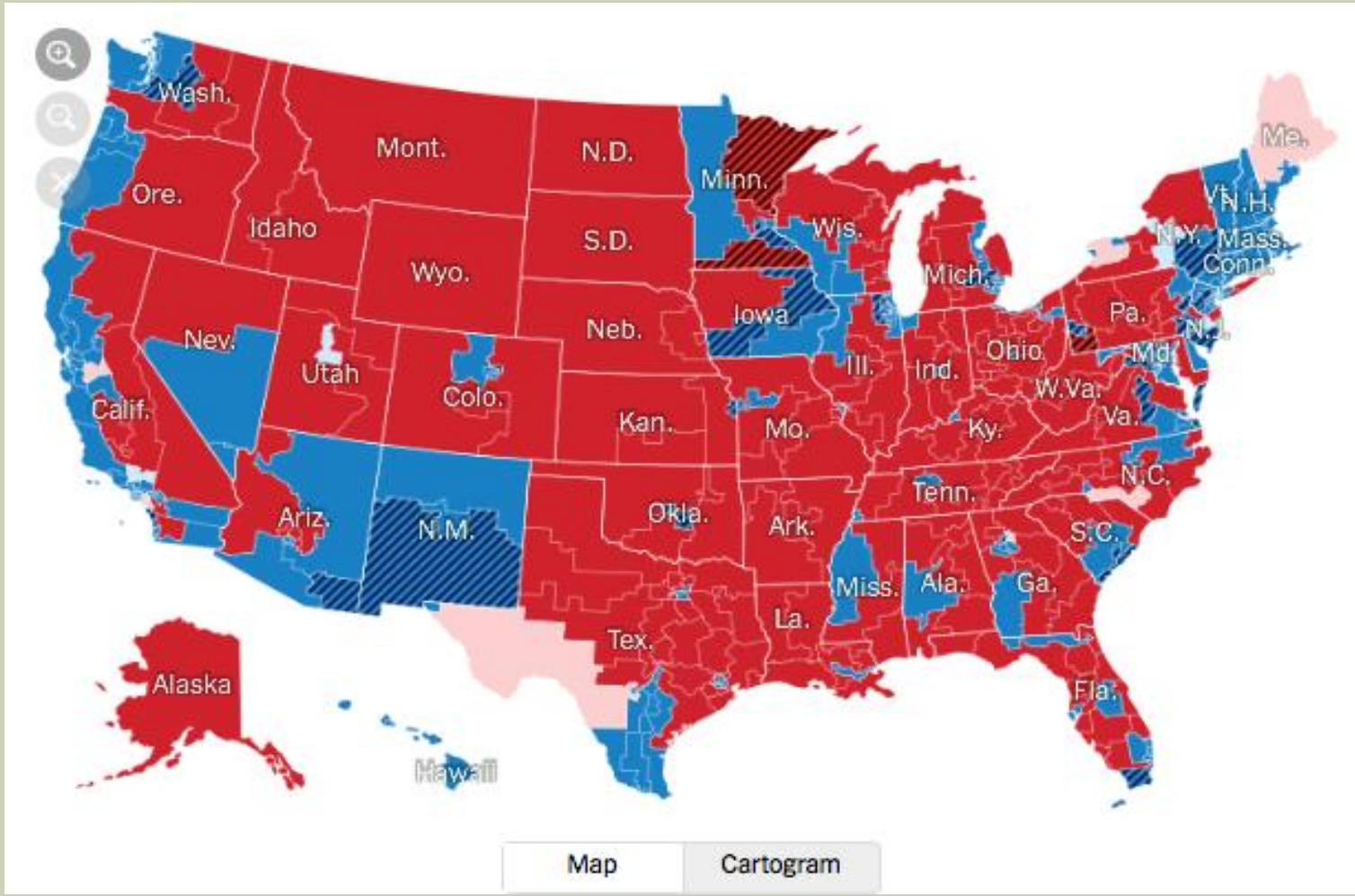




SENATE MAP


Wash.
Mont.
N.D.
Minn.
Me.
Vt.
Wis.
N.Y.
Mass.
Conn.
Mich.
Wyo.
Pa.
N.J.
Nev.
Neb.
Ohio
Md.
Utah
Ind.
W.Va.
Calif.
Va.
Mo.
Tenn.
Ariz.
N.M.
Miss.
Tex.
Fla.
Hawaii
Dem.
Lead Win Flip
Rep.
Lead Win Flip
Other
Lead Win Flip
Runoff
No election
Note: Democratic totals will include the results of two independents, Senator Bernie Sanders of Vermont and Senator Angus King of Maine, who caucus with the Democrats.

HOUSE MAP


Wash.
Mont.
N.D.
Minn.
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Ore.
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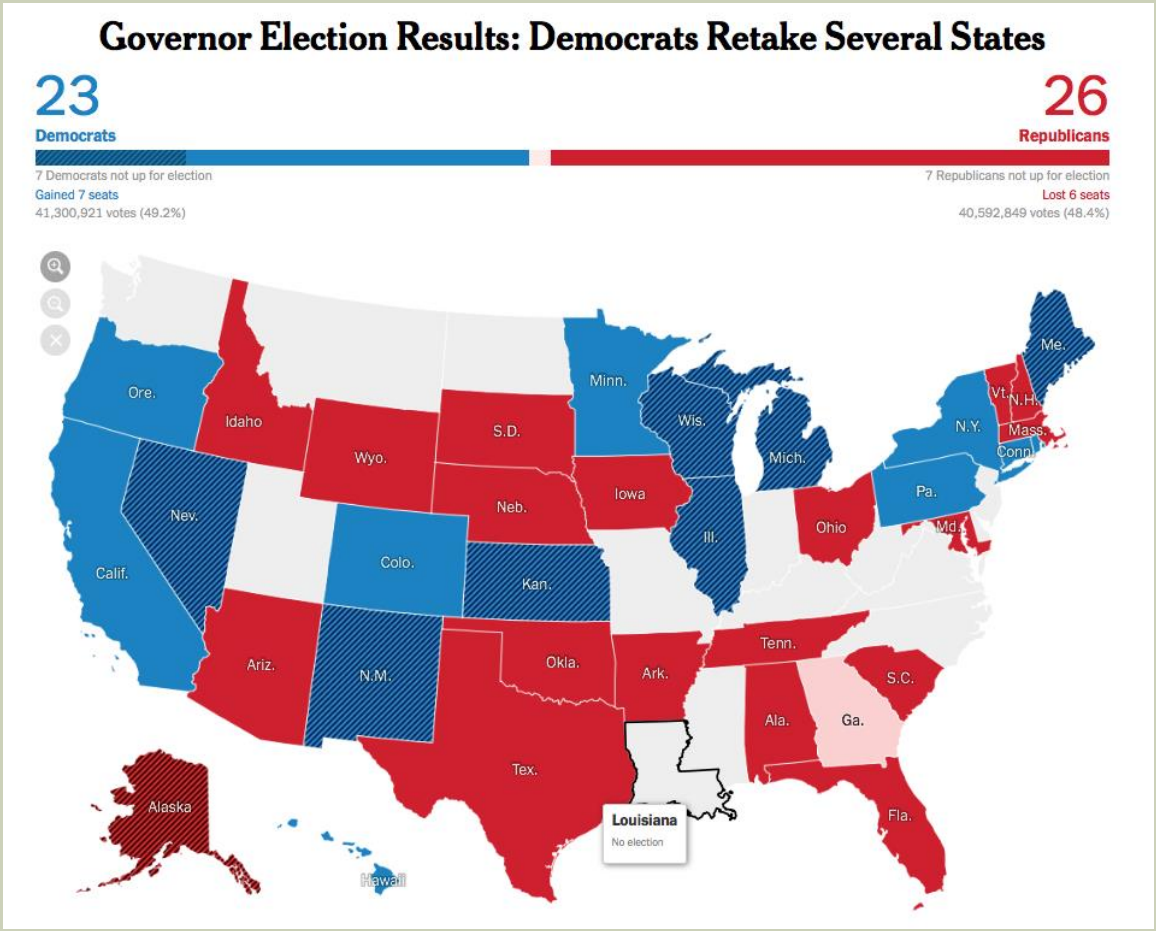
Mass.
Conn.
Wyo.
Mich.
Pa.
N.J.
Nev.
Neb.
Iowa
Ohio
Md.
Utah
Ill.
Ind.
W.Va.
Colo.
Calif.
Kan.
Mo.
Ky.
Va.
N.C.
Tenn.
Ariz.
N.M.
Okla.
Ark.
S.C.
Miss.
Ala.
Ga.
La.
Tex.
Alaska
Fla.
Hawaii
Map
Cartogram

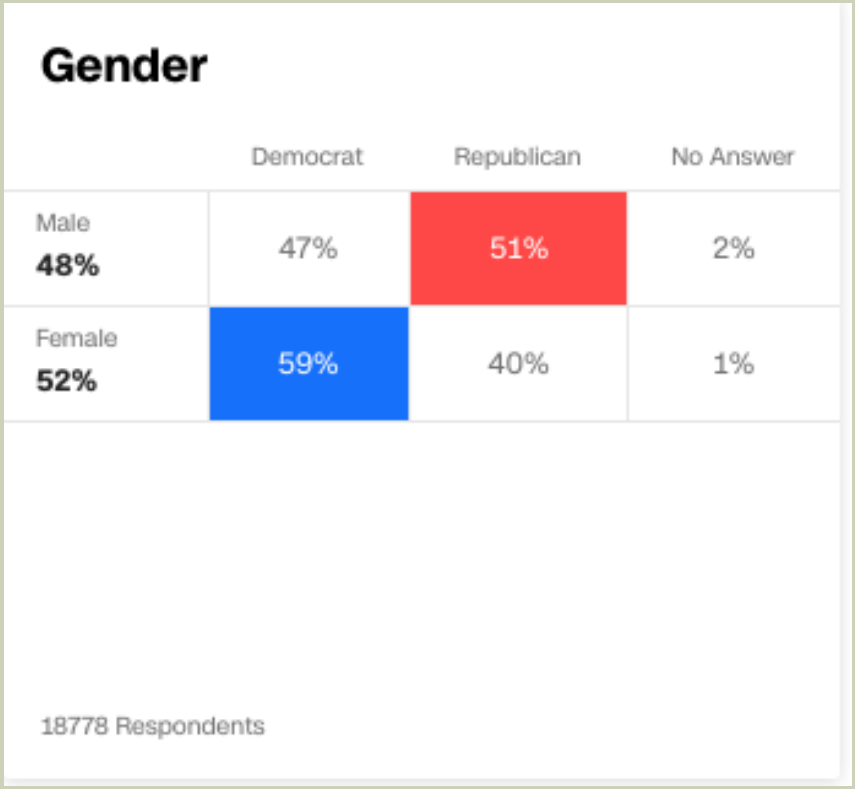
GOVERNORS


Governor Election Results: Democrats Retake Several States
23
Democrats
7 Democrats not up for election
Gained 7 seats
41,300,921 votes (49.2%)
26
Republicans
7 Republicans not up for election
Lost 6 seats
40,592,849 votes (48.4%)
Ore.
Idaho
Wyo.
S.D.
Minn.
Wis.
Mich.
Me.
Vt.
N.H.
N.Y.
Mass.
Conn.
Pa.
Nev.
Neb.
Iowa
Ill.
Ohio
Md.
Calif.
Colo.
Kan.
Ariz.
N.M.
Okla.
Ark.
Tenn.
S.C.
Ala.
Ga.
Tex.
Fla.
Alaska
Louisiana
No election
Hawaii

WOMEN WIN ACROSS PARTY LINES

- Record 123 women will be in next Congress (mostly Dems)
- 40 women of color
- Two Muslim Americans
- Two Native Americans
- LGBT candidates win

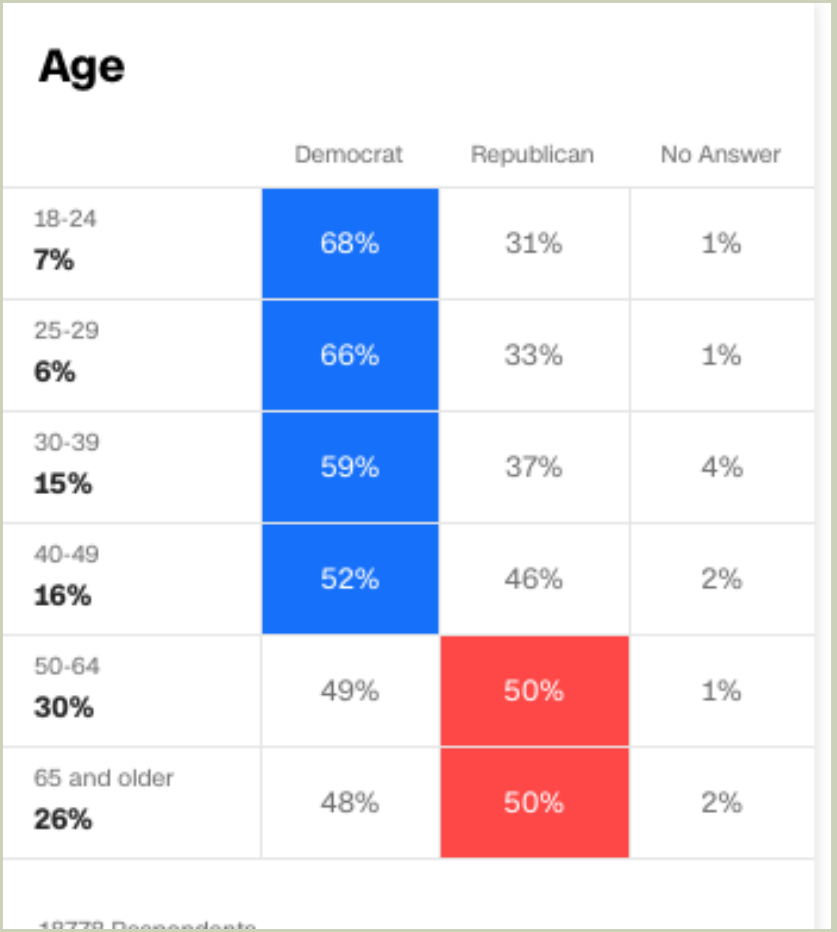
DIVIDED AMERICA – EXIT POLLS



Gender

	Democrat	Republican	No Answer
Male **48%**	47%	51%	2%
Female **52%**	59%	40%	1%

18778 Respondents



Age

	Democrat	Republican	No Answer
18-24 **7%**	68%	31%	1%
25-29 **6%**	66%	33%	1%
30-39 **15%**	59%	37%	4%
40-49 **16%**	52%	46%	2%
50-64 **30%**	49%	50%	1%
65 and older **26%**	48%	50%	2%

RACE

Race by gender

	Democrat	Republican	No Answer
White men **35%**	39%	60%	1%
White women **37%**	49%	49%	2%
Black men **5%**	88%	12%	N/A
Black women **6%**	92%	7%	1%
Latino men **5%**	63%	34%	3%
Latino women **6%**	73%	26%	1%
Others **6%**	66%	32%	2%

Race

	Democrat	Republican	No Answer
White **72%**	44%	54%	2%
Black **11%**	90%	9%	1%
Latino **11%**	69%	29%	2%
Asian **3%**	77%	23%	N/A
Other race **3%**	54%	42%	4%

18778 Respondents

EDUCATION AND RELIGION

Education

	Democrat	Republican	No Answer
HS or less **23%**	48%	51%	1%
Some college **25%**	52%	47%	1%
Associate's degree **11%**	47%	50%	3%
Bachelor's degree **24%**	55%	43%	2%
Advanced degree **17%**	65%	34%	1%

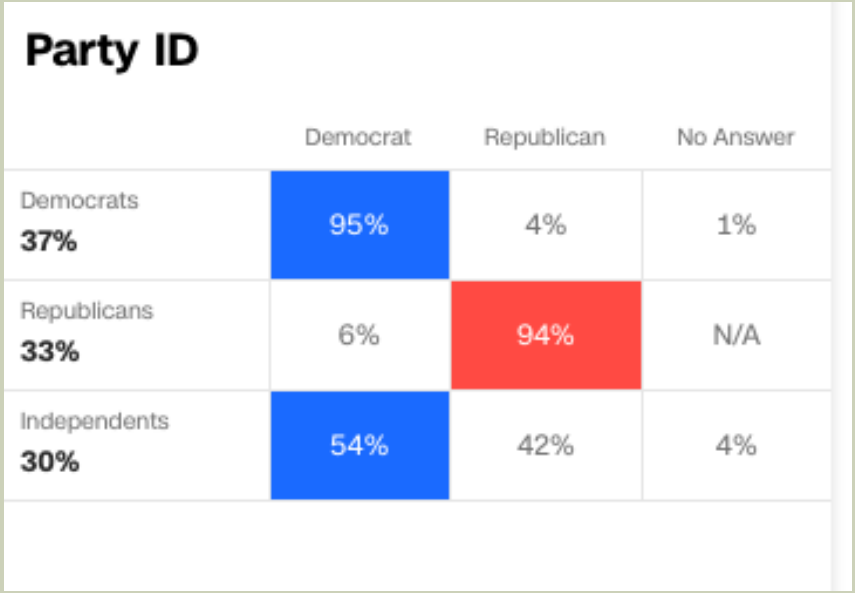
18778 Respondents

Religion, combined Protestant and other Christian

	Democrat	Republican	No Answer
Protestant/Oth. Christian **47%**	42%	56%	2%
Catholic **26%**	50%	49%	1%
Jewish **2%**	79%	17%	4%
Other **8%**	73%	25%	2%
No religion **17%**	70%	28%	2%

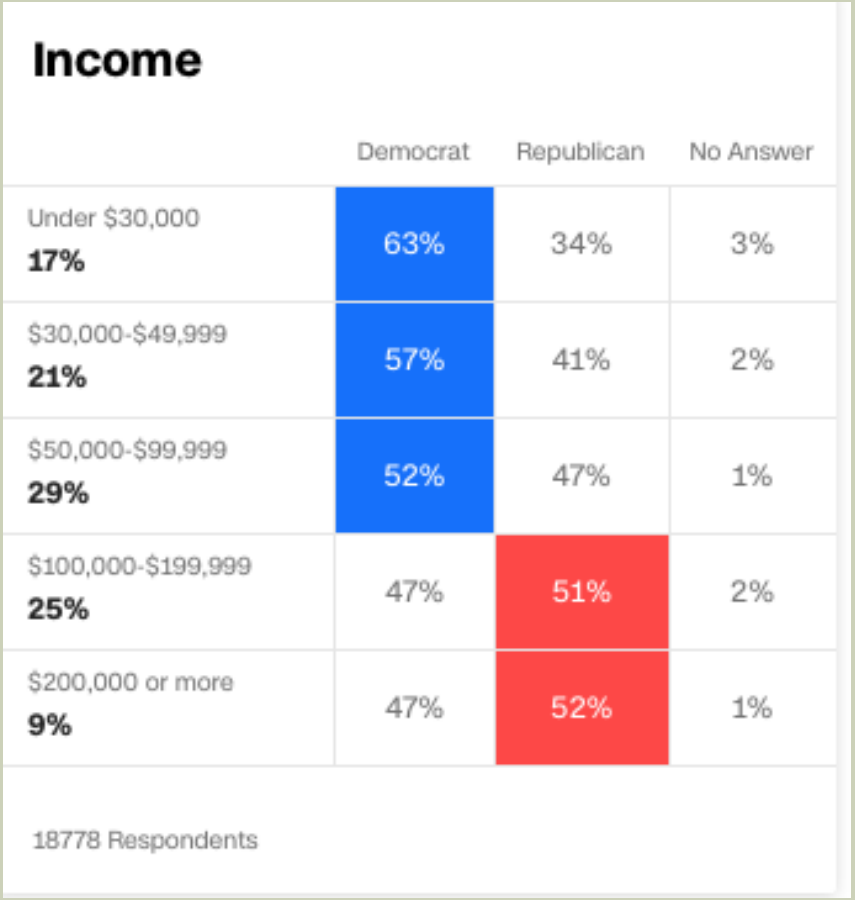
18778 Respondents

PARTY AND INCOME



Party ID

	Democrat	Republican	No Answer
Democrats **37%**	95%	4%	1%
Republicans **33%**	6%	94%	N/A
Independents **30%**	54%	42%	4%



Income

	Democrat	Republican	No Answer
Under $30,000 **17%**	63%	34%	3%
$30,000-$49,999 **21%**	57%	41%	2%
$50,000-$99,999 **29%**	52%	47%	1%
$100,000-$199,999 **25%**	47%	51%	2%
$200,000 or more **9%**	47%	52%	1%

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THE ISSUES

Most important issue facing the country

	Democrat	Republican	No Answer
Health care **41%**	75%	23%	2%
Immigration **23%**	23%	75%	2%
Economy **22%**	34%	63%	3%
Gun policy **10%**	70%	29%	1%

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Does Trump's foreign policy make the U.S.:

	Democrat	Republican	No Answer
Safer **38%**	8%	91%	1%
Less safe **46%**	90%	9%	1%
No difference **13%**	60%	38%	2%

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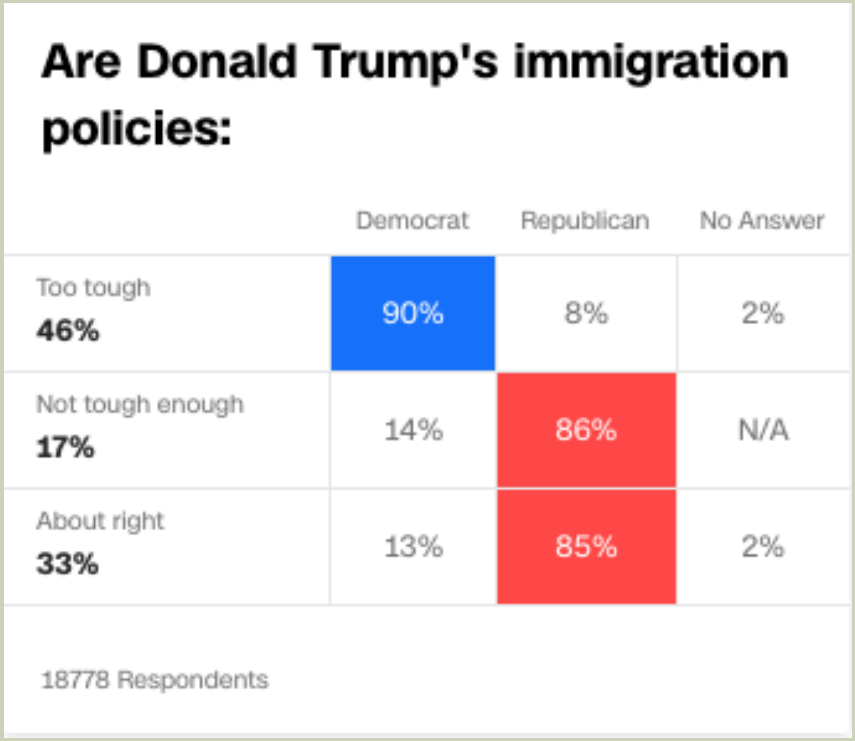
IMMIGRATION AND TRADE



Are Donald Trump's immigration policies:

	Democrat	Republican	No Answer
Too tough **46%**	90%	8%	2%
Not tough enough **17%**	14%	86%	N/A
About right **33%**	13%	85%	2%

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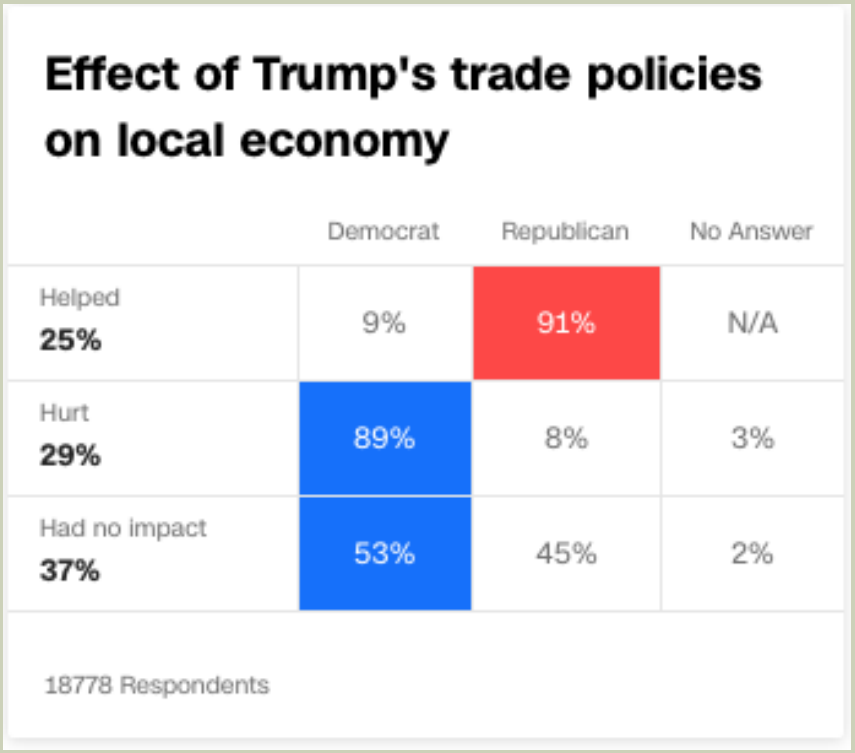

Effect of Trump's trade policies on local economy

	Democrat	Republican	No Answer
Helped **25%**	9%	91%	N/A
Hurt **29%**	89%	8%	3%
Had no impact **37%**	53%	45%	2%

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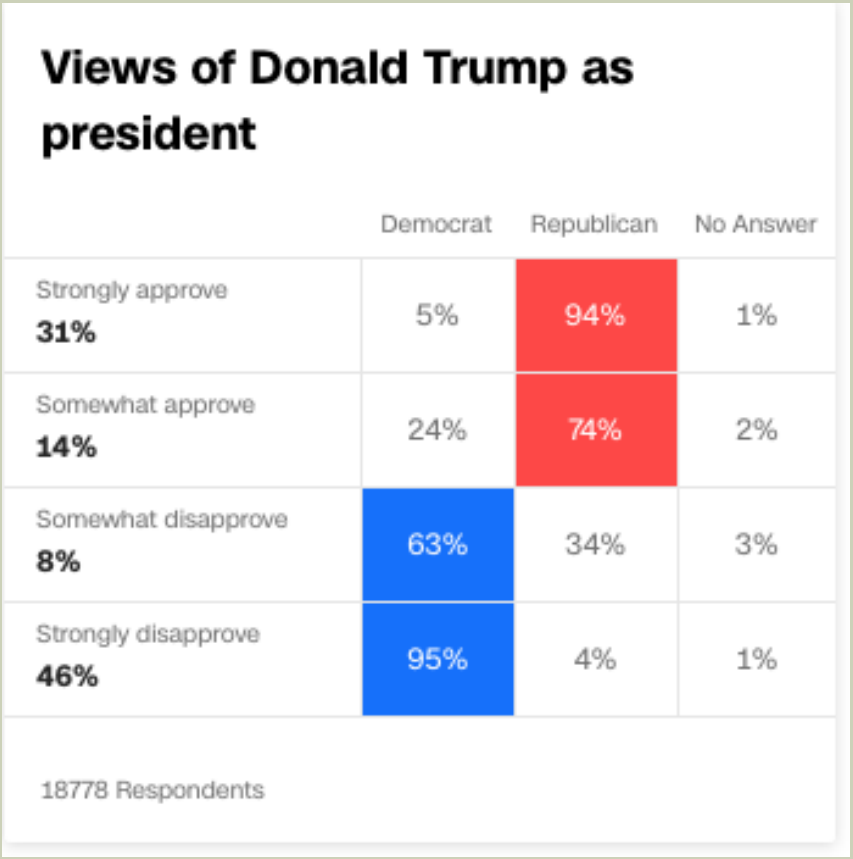
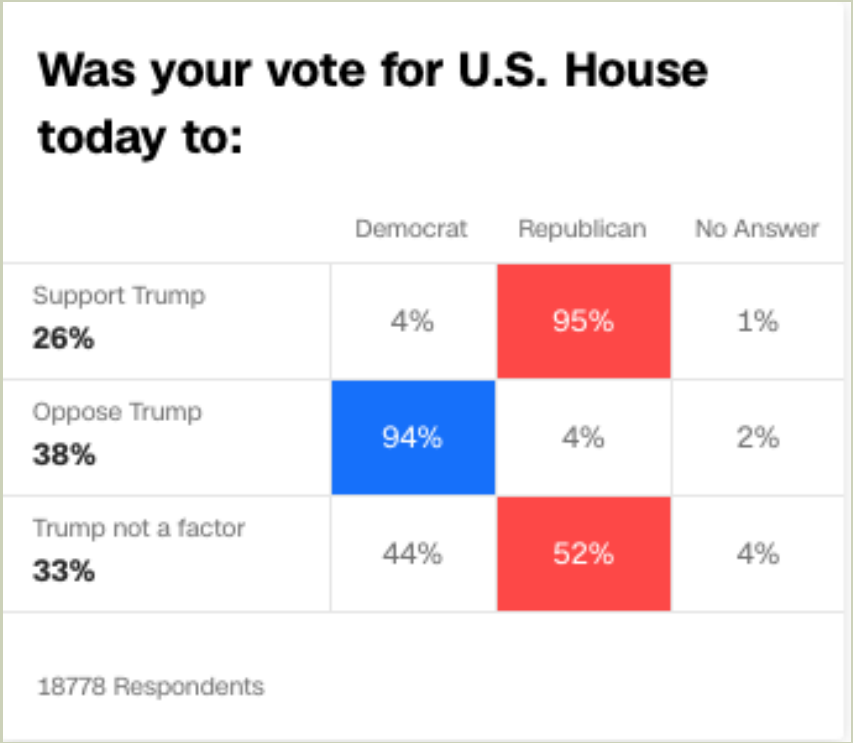
THE TRUMP REFERENDUM



Views of Donald Trump as president

	Democrat	Republican	No Answer
Strongly approve **31%**	5%	94%	1%
Somewhat approve **14%**	24%	74%	2%
Somewhat disapprove **8%**	63%	34%	3%
Strongly disapprove **46%**	95%	4%	1%

18778 Respondents



Was your vote for U.S. House today to:

	Democrat	Republican	No Answer
Support Trump **26%**	4%	95%	1%
Oppose Trump **38%**	94%	4%	2%
Trump not a factor **33%**	44%	52%	4%

18778 Respondents

WHAT THE VOTE TELLS US
NOT A WAVE, A REALIGNMENT

- The suburbs shifted heavily toward the Democratic party, driven by women voters. GOP lost at least 27 seats in suburban areas, compared to 7 in rural or small towns.
- Democrats regained ground in Upper Midwest – especially Wisconsin, Michigan, Iowa and Pennsylvania, all key to Trump victory in 2016.
- Democrats made large gains at state levels, not only governors but state legislatures, key to redistricting.
- GOP has huge advantage in rural and small towns, and in the South, which gives them advantage for Senate but not House.
- Democrats turned out large numbers of young and minority voters – as in 2008.
- South is now in play even though Dems lost high profile races in Florida, Georgia and Texas. GOP shut out in Northeast, West coast.

LESSONS OF 2018

- Trump believes it was failure of GOP establishment to follow his anti-immigrant, protectionist, xenophobic campaign themes. Blames moderates and GOP leaders for not falling in line behind him. GOP now the Trump Party. Moderates almost gone.
- Trump will double down on those policies and campaign constantly from here to 2020 election.
- Democrats have debate between progressives and centrists but results seem to show that progressives do well in deep Blue areas but centrists do very well in purple areas and red states. Both will exist within the party and split is not as deep as between Tea Party and establishment GOP.
- Most Democrats adopted themes from Sanders wing – Medicare for all, minimum wage increase, climate change. Left will push for more anti-Trump posture but election strategy was to avoid that – voters already hate Trump so no need.

WHAT COMES NEXT?

- What will Democrats do in the House?
- The firing of Sessions and the fate of the Mueller investigation
- Gridlock for the next two years – no major legislation to pass; budget battles.
- Bipartisanship – can it happen? NO
- A permanent campaign and the role of trade and foreign policy as only areas where President can act without much interference from Congress

KEY ISSUES FOR TRUMP FOREIGN POLICY AND WHAT IT MEANS FOR JAPAN

- IRAN AND THE MIDDLE EAST
- TRADE POLICY
- THE NEW COLD WAR WITH CHINA
- NORTH KOREA

IRAN – TARGET NUMBER ONE?

- Key figures in Trump administration are hawks on confronting Iran – Bolton, Mattis, Kushner, Pompeo, Trump
- Key political constituencies want to confront Iran – especially Christian evangelicals but also Southern conservatives
- An axis of the Netanyahu government in Israel, the Saudi monarchy and Gulf states (not Qatar) pushing for confrontation with Iran
- Goal is not large scale war but to bring down the Iranian regime
- But Iranian regime is likely to escalate tensions in response, creating danger of conflict building up
- US will pressure allies and partners – Europe, Japan, South Korea, India, others to join the anti-Iran axis, beginning already with sanctions implementation

THE COMING TRADE WAR

- Trump will continue to pursue an economic nationalist trade policy, backed by aggressive use of punitive tariffs as tool to force bilateral (NOT multilateral) trade agreements.
- Trump believes in the idea of trade balance as a symbol of national strength and has a goods-based, manufacturing view of trade – no interest in services or in global supply chain management.
- USTR head Lighthizer works closely with the President and keeps a low profile. The USMCA is now the model for Lighthizer as he heads into negotiations with Japan, China and EU. But Congress could block USMCA approval.
- For Japan, key issue will be autos, not agriculture. US will see numerical quotas on Japanese auto exports to US. Will probably accept TPP levels on agriculture in exchange for major changes on autos.

THE NEW COLD WAR VS CHINA

- The Pence speech to Hudson Institute on China on October 4 was collective statement of administration.
- Key features – China is main strategic rival of U.S.; hopes that China would reform and join world order post-WTO are now gone; must confront Chinese efforts to gain technological superiority and military challenges in Western Pacific and beyond; tighten cooperation with Taiwan and others vs China.
- Core neoconservatives architects of this -- Bolton, Michael Pillsbury, others.
- Trump officials (Lighthizer, Navarro) want to decouple US firms from their dependence on China-based supply chains and block Chinese purchases of US high tech firms. Cooperate with Japan and EU.
- Threat to impose new round of tariffs on China is real. Not much hope for breakthrough at G-20 Xi-Trump meeting but who knows?
- Growing consensus among US experts to challenge China but no agreement on methods used by Trump or 'new Cold War' approach

NORTH KOREA – NOBEL PRIZE OR WAR?

- Negotiations between North Korea and US have hit predictable impasse – US wants clear steps to denuclearize; NK offers symbolic freeze but no dismantlement; seeks easing of sanctions and end of war declaration.
- Gap also open between Seoul and Washington, with South Koreans preparing to push ahead on engagement, maybe without US backing. Alliance troubles ahead.
- North Koreans looking for summit with Trump; believe they can get what they want directly from him – Singapore model.
- What will Trump do? No one knows. Most believe he wants to pursue peace deal, even if not good one, to claim victory and get Nobel Prize (competing with Obama).
- But if talks collapse, Trump could revert to threat of war.

CRISIS AHEAD

- Cabinet reshuffles will continue beyond Sessions
- Mattis may leave but not clear
- Mueller will file his report and possible new indictments, including of Trump family members, soon
- Trump may move to fire Mueller ahead of that, triggering constitutional crisis
- Economy may lose momentum as political warfare escalates
- Foreign policy to serve as distraction from domestic problems – Iran and North Korea?