

## The Blue Wave Narrative And What To Watch This Fall

Democrats are getting excited at the prospect of a Blue Wave this fall, and the media seems to be joining in the hype. While Republicans had a Red Wave disappointment in 2022, Democrats had their own Blue Wave bust in 2020. On Election Night, House Democrats had a rude awakening by coming very close to losing the House. Much of their campaign polling turned out to be wrong in several races, and what they thought were safe seats were in more trouble than they realized.

The 2020 Blue Wave narrative was fueled by media polling that showed large leads for Democrats. Some media polls in the final pre-election week showed double digit leads for Biden, like Economist/YouGov showing +10 Biden, NBC/WSJ +10 Biden, and Quinnipiac +11 Biden. Some pre-election polls showed party ID leads for Democrats that had never happened in any election in modern history.

A Democratic [post-election autopsy](#) declared “polling in the 2020 cycle was widely viewed as a catastrophic misfire from the top of the ticket down.” The report said that “inflated polling led Democrats to believe some stretch races were competitive and to take for granted other races as easy wins, leading to an overly-expansive electoral map.” From our tracking of pre-election polling at the time, the polling averages at the presidential and House levels were much larger than the actual vote margins. In the last two months leading up to the election, the presidential polling average was a 7.9% lead for Biden, when the final vote margin was 4.5%. A final vote margin of 4.5% was a solid win for him, but that margin was nowhere close to the Blue Wave landslide that had been predicted by the double digit Biden leads forecast in media polling.

2020 Actual Vote Margins Vs. Pre-Election Polling Margins	Presidential	House
Vote margins	4.5%	3.1%
Average last 2 months	7.9%	7.2%

The bigger surprise on Election Night 2020 was at the House level. The pre-election polling average was a 7.2% lead for Democrats when the final House margin was only 3.1%. With the House margin being around 3%, the House of Representatives was in play, and Republicans picked up 12 seats. In a result that [Politico](#) described as the “2020 Democratic House debacle,” “House Democrats were expected to win seats, but they instead ceded ground and suffered some shocking defeats.” House race surprises happened in south Florida, California, and Texas with one of the contributing factors being Republican inroads with Hispanic voters. The House Republican “Commitment to America” led by Kevin McCarthy gave candidates an agenda to run on, another asset to Republicans in close races.

A Blue Wave could happen this November, but it would be more likely to happen among independents than a large party ID advantage. Democrats are still recovering from their decline as a percentage of the electorate, going from 37% in 2020 (House level) to 32% in 2024. It is possible they can regain some of that by November, but seems unlikely they could reclaim a party ID advantage of +4 as they had in 2018. For the last two election cycles, Republicans have had a party ID advantage of +3R, and it is not yet known if this advantage can be sustained. Democrats won independents by +2 in 2022, undercutting the expected Red Wave, and in 2024, won them by +1 at the House level. If Democrats could achieve double digit leads among independent voters this fall, this political opening could be how a Blue Wave could happen.

As the media narrative is moving toward a Blue Wave, keep an eye on the party ID in polling samples and the margin among independents.

Have a good weekend.

David & Myra