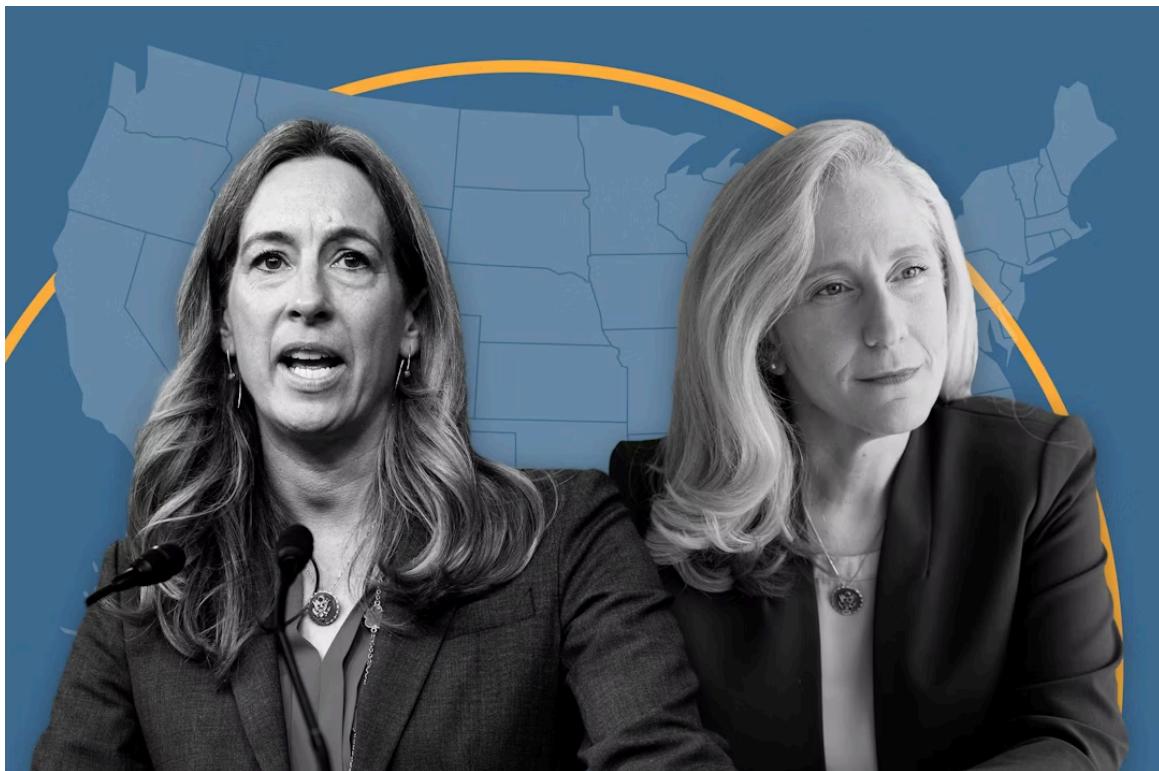


**MEMO** Published November 25, 2025 • 3 minute read

# Renewal or Ruin: The Stakes of Choosing the Right Model for Democrats

**Third Way**

We should feel both terrific and sober about the off-year elections. Much of the news was great, but it also laid bare the two projects defining the future for Democrats. One project is to make blue places bluer. That's what happened in NYC, and it's the mission of the far left. The other, which is our obsessive focus, is *flipping* red and purple places to blue.

As Democrats are in the minority in the House, Senate, and Electoral College, the only project that matters for a Democratic revival and stopping Trumpism is changing the colors on the map, not deepening the color of blue America. We've been arguing forcefully for months that the model for Democrats to retake power is not Zohran Mamdani but Mikie Sherrill and Abigail Spanberger. Sherrill, Spanberger, and Mamdani each surpassed 50% of the total general election vote, but Mamdani's victory came *in spite of* his performance with key voter groups, not because of it.

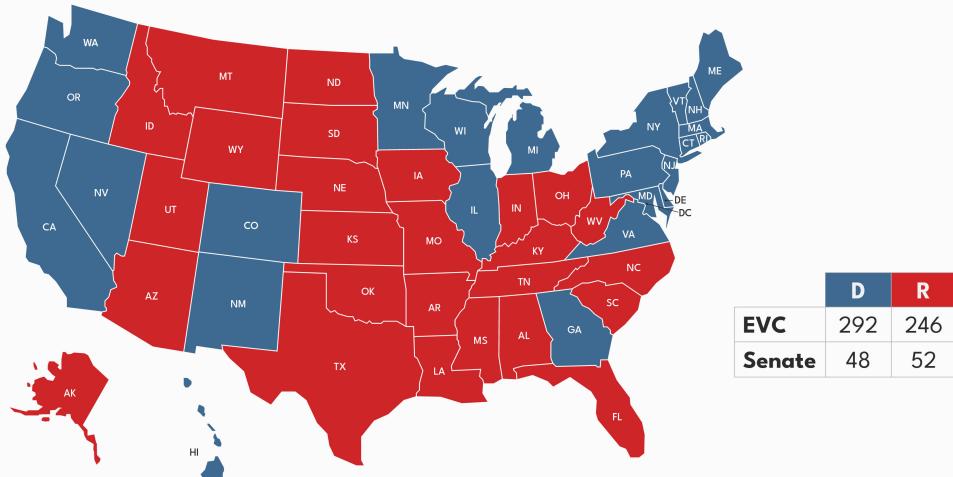
Meanwhile, Sherrill and Spanberger's victories are precisely *because* they built a winning coalition with swing voters.

Democrats have only won the White House one time since 1980 without winning a supermajority of moderate voters nationwide. But even in that anomalous year, Obama won 56% of moderate voters. If a Mamdani-like candidate were the next Democratic presidential nominee, it would mean an electoral bloodbath. Mamdani won just 36% of self-identified moderates, while Sherrill (62%) and Spanberger (69%) won supermajorities of moderate voters—reaching the crucial 60% moderate support that is necessary for a Democratic presidential nominee to win nationwide. Democrats who are able to win the battle of reasonableness with these voters in the middle, as Spanberger and Sherrill did, put us in the strongest position to defeat MAGA.

To see how Mamdani, Sherrill, and Spanberger's support would translate at the presidential and senate level, we projected their respective 36%, 62%, and 69% share of moderate voters across every state, and the results were staggering.

If a Sherrill-like presidential nominee were running with 62% moderate support in each state, and every senator running had that same level of moderate voter support, Democrats would win 292 electoral college votes and 48 seats in the Senate.

## Mikie Sherrill Share of Moderates (62%)

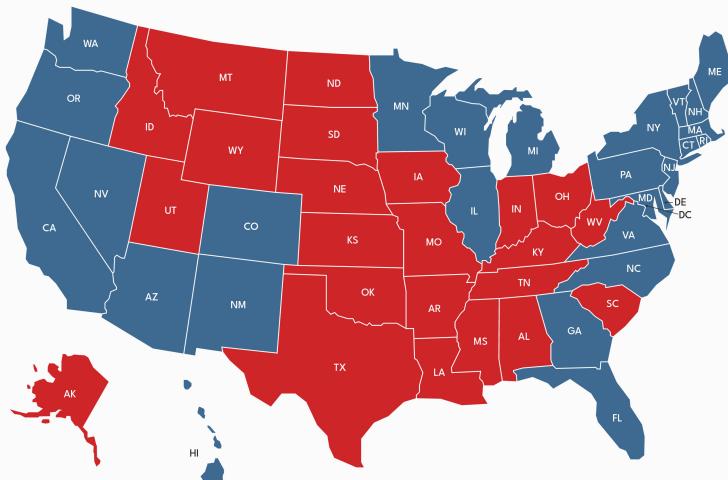


Source: Analysis of 2025 exit polls and 2024 AP Votecast data.

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Under the Spanberger scenario, if Democratic senate candidates won 69% of moderates, as does the presidential nominee, Democrats have an enormous landslide of 349 electoral college votes and a 54-46 majority in the Senate. Both of these scenarios lead to a renewal of the Democratic Party nationwide.

## Abigail Spanberger Share of Moderates (69%)



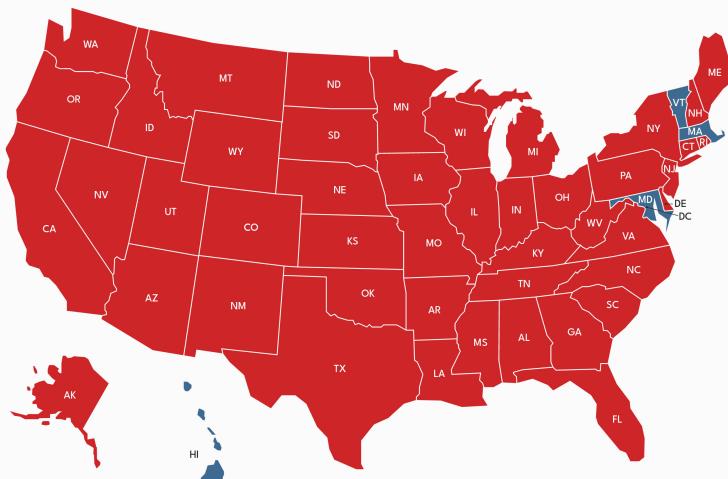
	D	R
EVC	349	189
Senate	54	46

Source: Analysis of 2025 exit polls and 2024 AP Votecast data.

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However, there is one path to ruin, and that is if Democrats opt to put a Mamdani-like nominee in the presidential slot. If all the Democratic Senate candidates and the presidential nominee won Mamdani's 36% of the moderate vote share in each state, Democrats would lose the general election 507 to 31—winning the electoral college votes of just Maryland, Massachusetts, Vermont, Hawaii, and the District of Columbia—and Democrats would hold just four governorships and eight senate seats with a Mamdani-like coalition. It's clear that the easiest way to ensure Trumpism spreads and thrives is to nominate a candidate incompatible with the views and values of moderate swing voters.

## Zohran Mamdani Share of Moderates (36%)



	D	R
EVC	31	507
Senate	8	92

Source: Analysis of 2025 exit polls and 2024 AP Votecast data.

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Regardless of one's personal policy preferences, to win in 2026 and 2028, Democrats have to overperform in unfavorable terrain, not underperform on home turf. There is enormous, often fatal, political danger for Democrats if the loudest, most organized, best-financed voices in the tent are the

far-left rather than the center. Presidents Clinton and Obama, and Nancy Pelosi as Speaker, proved it's possible to manage a broad coalition and win. But they did it from the center-out, not the left-in. That is what gave them two terms, Congressional majorities and governing progress.

If we have dynamic, pugnacious centrists leading the ticket in the right districts and states and, eventually, for the presidential nomination, we will win. Otherwise, we will reinforce Republican attacks that we are the extremists, and we will lose. Our path ahead is clear.

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