

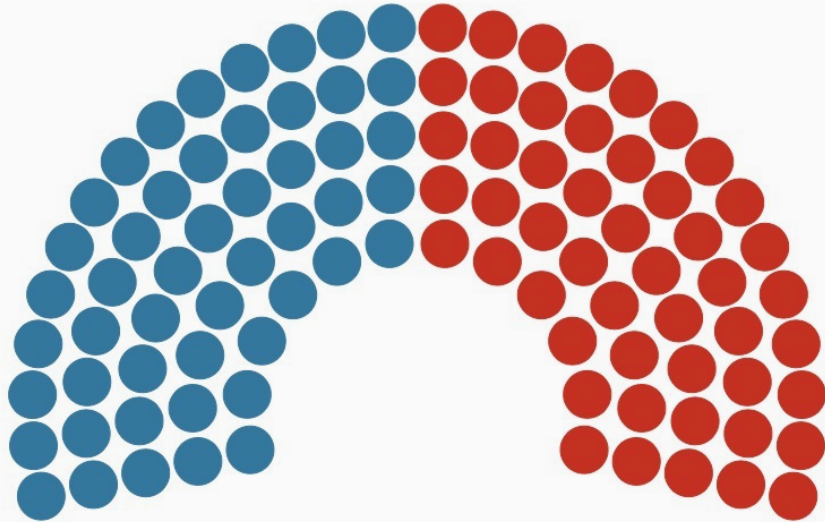


2022 Midterm Outlook

July 11, 2022
– 120 Days Until Election Day –



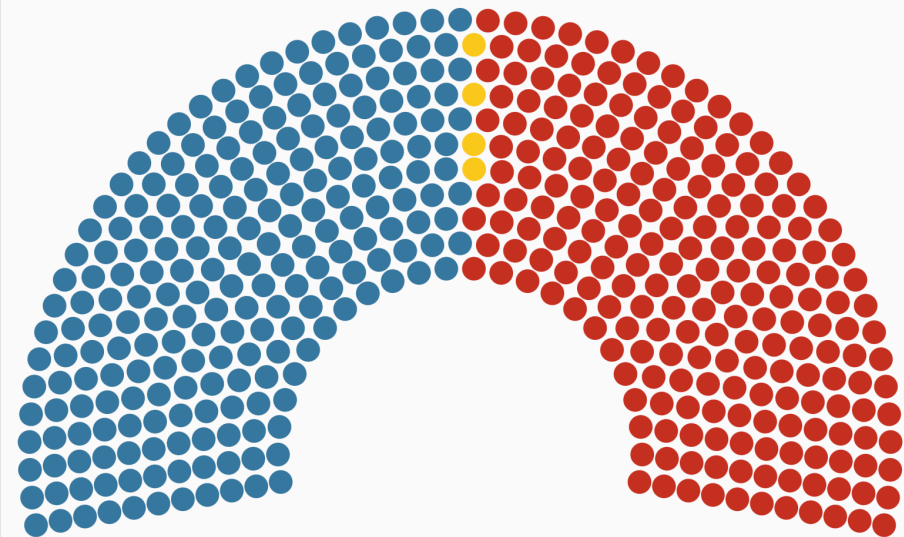
What's at Stake: Current Balance of Power



U.S. Senate
50 Ds – 50 Rs

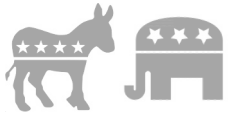
(Includes 2 independents who participate in the Democratic caucus; VP Harris serves as tiebreaking 51st vote)

Key races to watch: Georgia, Nevada,
Pennsylvania, Arizona



House of Representatives
220 Ds – 211 Rs

(4 vacancies: AK-At Large, MN-1, NY-19, NY-23)

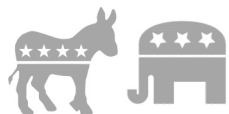


What's at Stake: Overview

- All House seats contested; Republicans must flip **4** seats currently held by Democrats to gain a majority *
- **35** Senate seats contested: **14** Democrat-controlled, **21** Republican-controlled **
- Many Members not seeking re-election
 - House: **31** Democrats, **18** Republicans
 - Senate: **1** Democrat, **6** Republicans

** Assumes party advantages for vacant seats/special elections*

*** Includes special election to finish Sen. Inhofe's (R-OK) term*

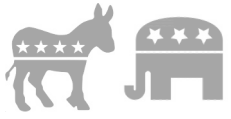


What's at Stake: Overview

- Since 1942, midterm elections have resulted in an average loss of **27** seats in the House and **4** seats in the Senate by the party occupying the White House
- 1998 and 2002 are outliers:
 - In 1998, Democrats gained **5** seats in the House and lost **0** seats in the Senate despite occupying the White House
 - In 2002, Republicans gained **8** seats in the House and gained **1** seat in the Senate

Year	Party holding presidency	President's party gain/loss of seats in House	President's party gain/loss of seats in Senate
1942	D	-44	-9
1946	D	-55	-12
1950	D	-28	-5
1954	R	-18	-1
1958	R	-48	-12
1962	D	-4	2
1966	D	-48	-4
1970	R	-12	1
1974	R	-48	-4
1978	D	-15	-3
1982	R	-26	1
1986	R	-5	-8
1990	R	-8	-1
1994	D	-54	-8
1998	D	5	0
2002	R	8	1
2006	R	-30	-6
2010	D	-63	-6
2014	D	-13	-9
2018	R	-41	2

Source: Brookings Institution



Outlook: What Are They Saying?

“It’s a perfect storm of problems for the Democrats because it’s an entirely Democratic government. Which leads you to ask the question: ‘How could you screw this up?’ It’s actually possible. And we’ve had some experience with that in the past.”

– ***Senate Minority Leader Mitch McConnell, April 2022***



“We didn’t gain seats when President Biden won. We worked together to win the Senate, win the House and win the White House. It was cumulative, but it wasn’t an increase... We take nothing for granted. We intend, by redistricting... by recruitment... with raising of money... and raising interest in volunteers... We have decided to win, and that’s what we will do.”

– ***House Speaker Nancy Pelosi, February 2022***

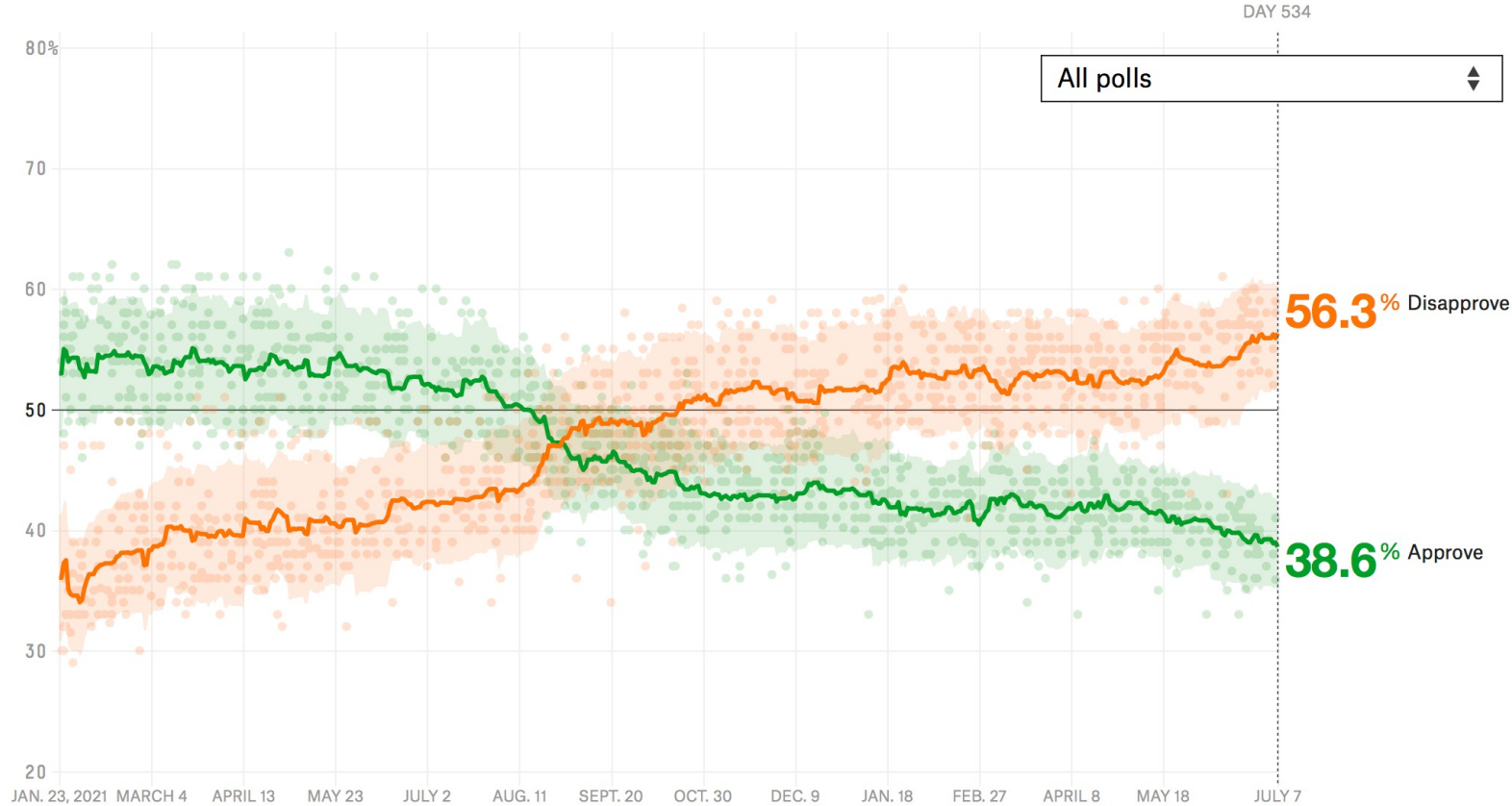
“It’s not going to be an election [like] 2010 where we win 60 seats... I’ll make this one prediction — we’re going to win the majority. And it’s not going to be a five seat majority... The play this time, there’s fewer competitive seats in the old nature, so we’re going to have to be winning seats in Democratic areas.”

– ***House Minority Leader Kevin McCarthy, March 2022***





Public Sentiment: Biden Approval Rating



President Biden's Approval Rating
7/7/2022 (FiveThirtyEight)

KEY ESTIMATE PROJECTION
90% OF POLLS PROJECTED
TO FALL IN THIS RANGE

How Do Other Presidents' Approval Ratings Compare?*



41% 6/21/2018



46% 6/21/2010



76% 6/21/2002



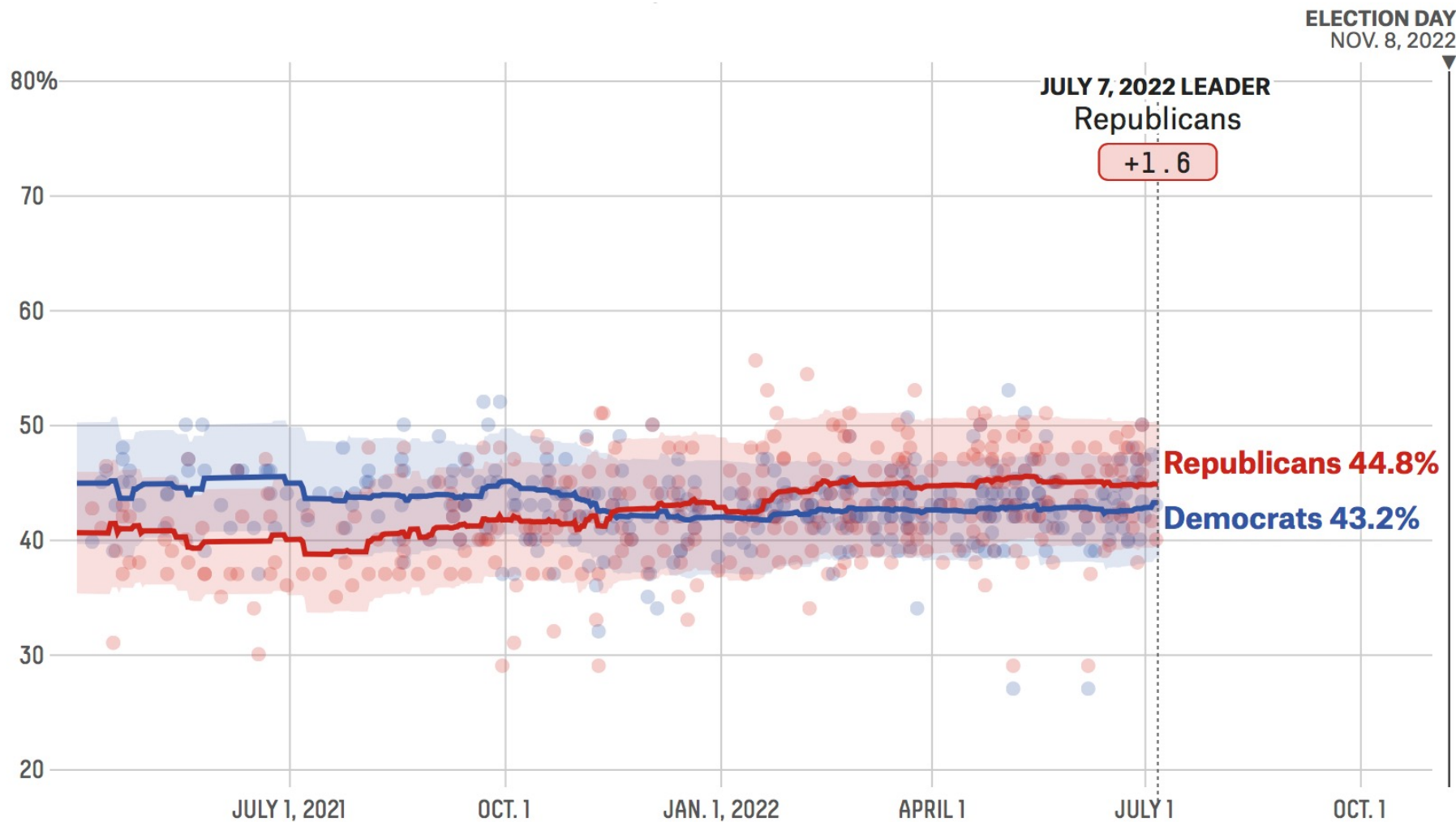
43% 6/25/1994

*Represents approval polling on Gallup
Presidential Job Approval Center



Public Sentiment: Generic Ballot

Estimate based on polls that inquire which party voters would support in an election

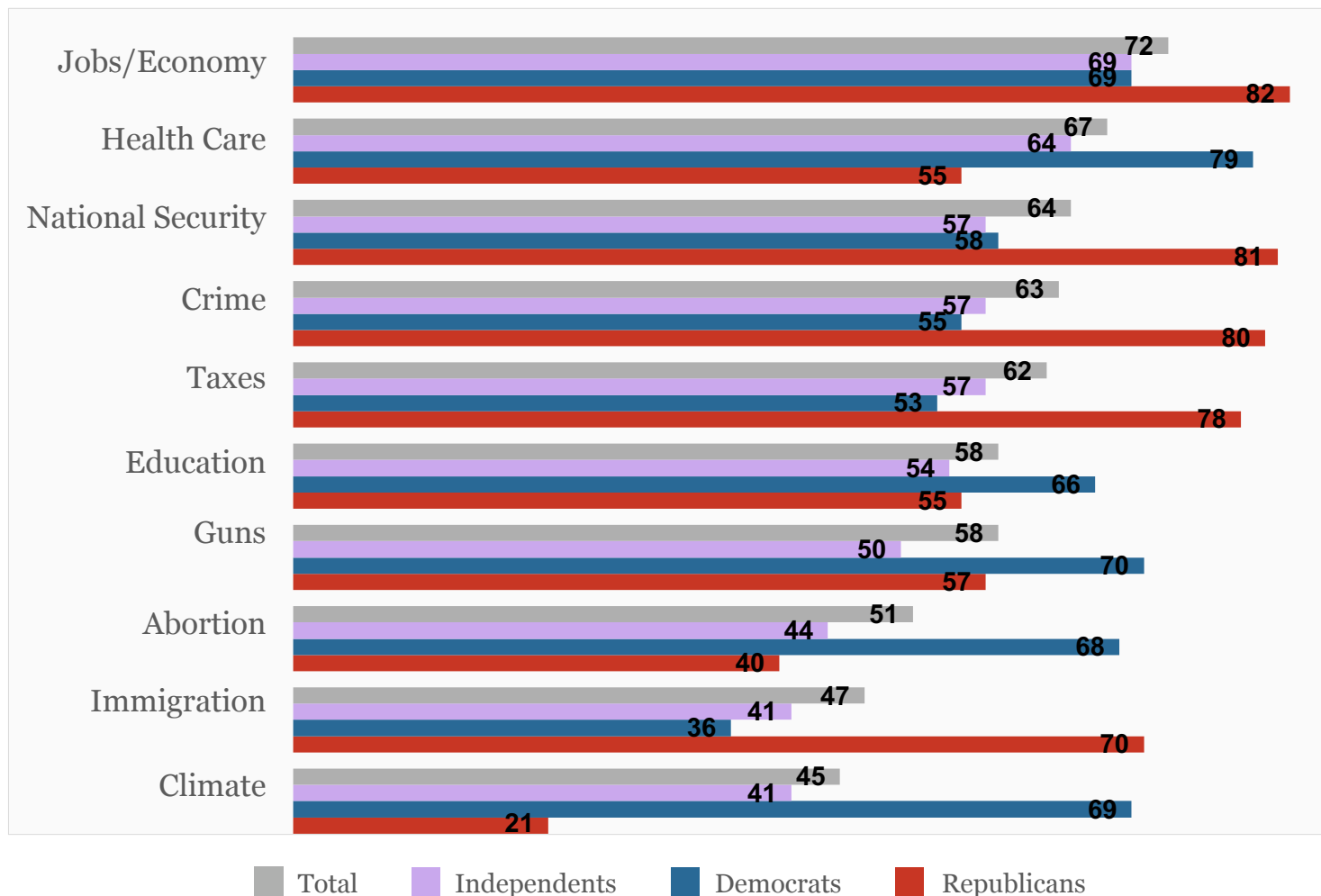


FiveThirtyEight



Public Sentiment: Key Issues for Voters

Based on a survey that required voters to identify which issues are “very important”



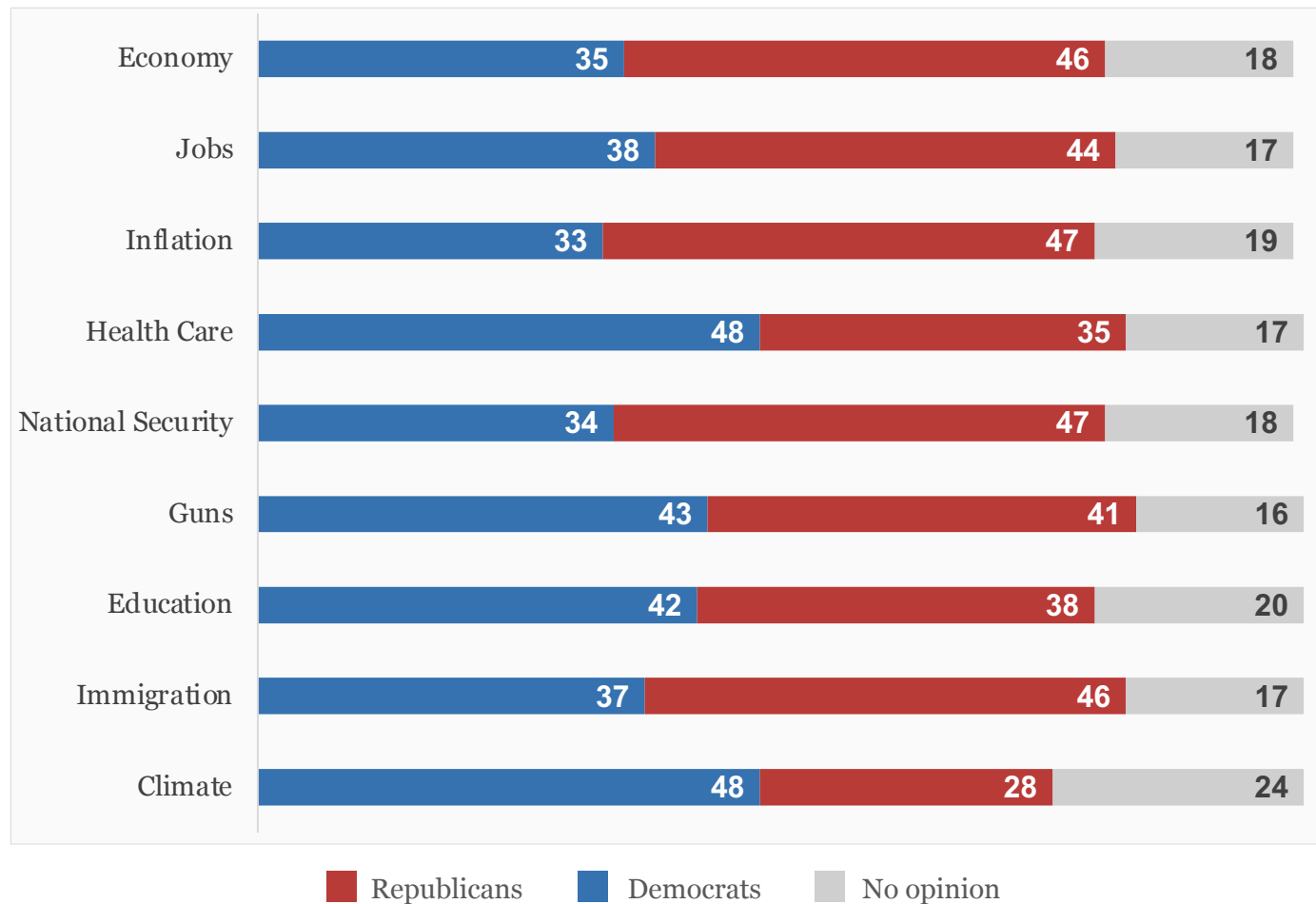
- Jobs and the economy are the public’s top concern, followed by health care and national security
- Notably, the issue of abortion increased in importance among Democrats the past 2 weeks by a total of 12 percentage points
- Wide partisan gaps remain on a number of issues, but a majority in both parties are concerned with jobs and the economy, crime, health care, national security, taxes, education, and gun policy

Source: Economist/YouGov survey of U.S. adults conducted 7/2 – 7/4/2022



Public Sentiment: Party Advantage on Key Issues

Based on a poll that inquires which party would do a better job addressing each issue



- Republicans hold an advantage with voters concerned about the economy, jobs, inflation, immigration, national security, and immigration
- Democrats hold an advantage with voters concerned about health care, gun policy, education, and climate

Source: Morning Consult-Politico poll of U.S. adults
conducted 6/25 – 6/28/22



Public Engagement: Primary Turnout by Party

Turnout comparison of 2018 vs 2022 in most states that have held primaries in 2022

+ 10%

Turnout increase overall

- 4%

Turnout increase among Democrats

+ 26%

Turnout increase among Republicans

+ 6 pt

Increase in Republican % of electorate

CO, IA, KY, NC, NV, PA, WV

Flipped electorates

*Source: 6/29, JMC Analytics & Polling
Subject to change as more data comes in*

** KY: 2014 figures used; PA: 2010*

*** CA projected*



Recent Primaries: The Trump Effect

Is the endorsement of the former president helping or hurting primary candidates?

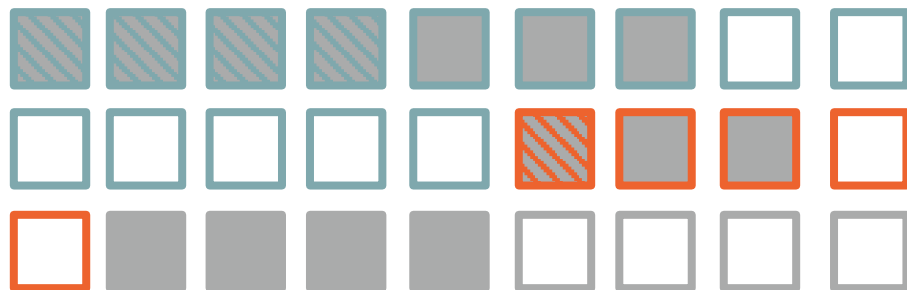
Senate

7 won and 0 lost out of 9 endorsements



House

14 won and 5 lost out of 27 endorsements



- 19** ➤ Trump-endorsed candidates who won in races considered competitive
- 3** ➤ Winning candidates who were challengers to incumbents
- 5** ➤ Trump-endorsed candidates who lost in races considered competitive
- 2** ➤ Losing candidates who were challengers to incumbents
- 19** ➤ Remaining races featuring Trump-endorsed candidates

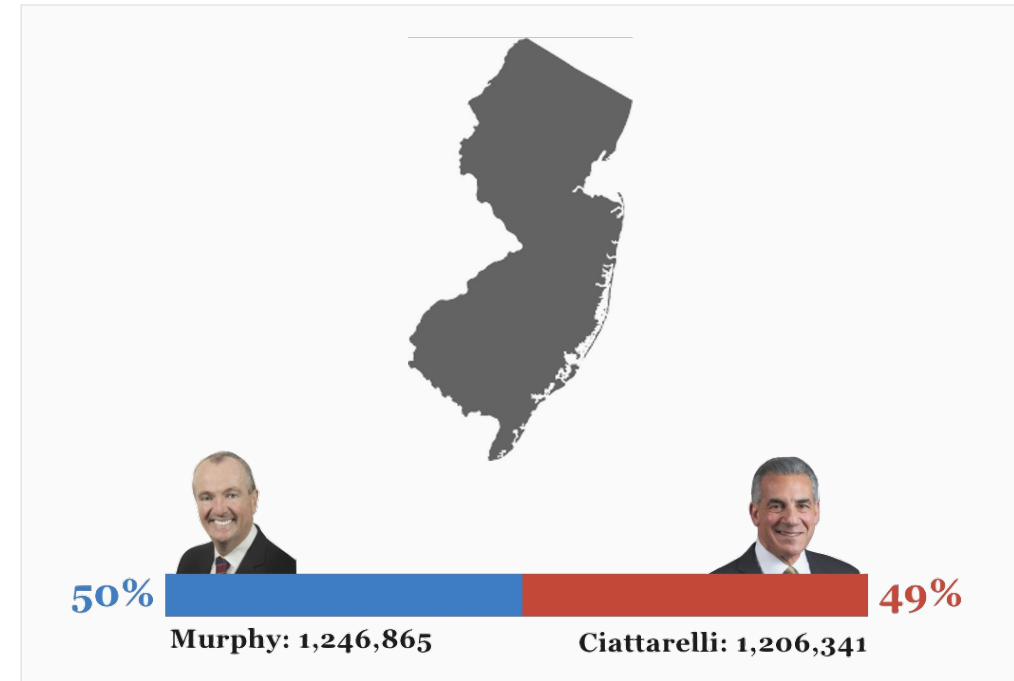
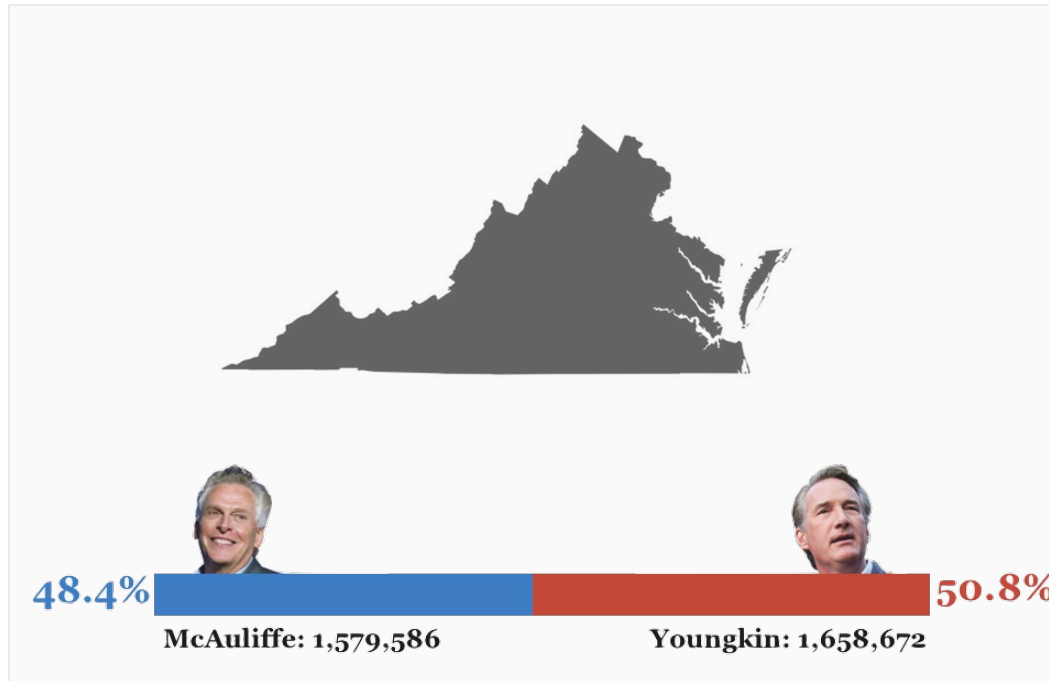
Open Seat Endorsee is incumbent Won Lost

Source: 6/29/22, *Axios*
Note: Data only includes races in which at least two candidates have a reasonable chance of winning



Public Sentiment: Recent Statewide Elections

Gubernatorial Elections: Republicans' victory in Virginia and surprisingly narrow results in New Jersey may signal strong support for Republicans in 2022





Public Sentiment: Recent Special Elections

Results in 2021 and 2022 special elections have been inconsistent, with Republicans performing well in some states (e.g. TX-6 and CA-22) and Democrats overperforming in others (e.g. LA-2 and NM-1)

Date	Seat	Partisan Lean	Vote Margin	Margin Swing
March 20, 2021	Louisiana 2nd*	D +51	D +66	D +15
March 20, 2021	Louisiana 5th*	R +31	R +45	R +13
May 1, 2021	Texas 6th*	R +11	R +25	R +14
June 1, 2021	New Mexico 1st	D +18	D +25	D +7
Nov. 2, 2021	Ohio 11th	D +57	D +58	EVEN
Nov. 2, 2021	Ohio 15th	R +19	R +17	D +2
Jan. 11, 2022	Florida 20th	D +53	D +60	D +7
April 5, 2022	California 22nd*	R +11	R +32	R +22
	Average	D +13	D +11	R +2

** Top-two primaries; vote margin represents total share for Democrat candidates minus total share for Republican candidates
Source: FiveThirtyEight*



Senate



- **35** contested Senate seats:
 - **14** Democrat-controlled seats
 - **21** Republican-controlled seats
- Most competitive: *
 - **3 D:** AZ (**Kelly**); GA (**Warnock**); NV (**Cortez Masto**)
 - **2 R:** PA (**Open**); WI (**Johnson**)
 - *Senate battleground states mirror battleground states of 2020 Presidential Election*
- Competitive: **
 - **1 Lean D:** NH (**Hassan**)
 - **3 Lean R:** FL (**Rubio**); NC (**Open**); OH (**Open**)

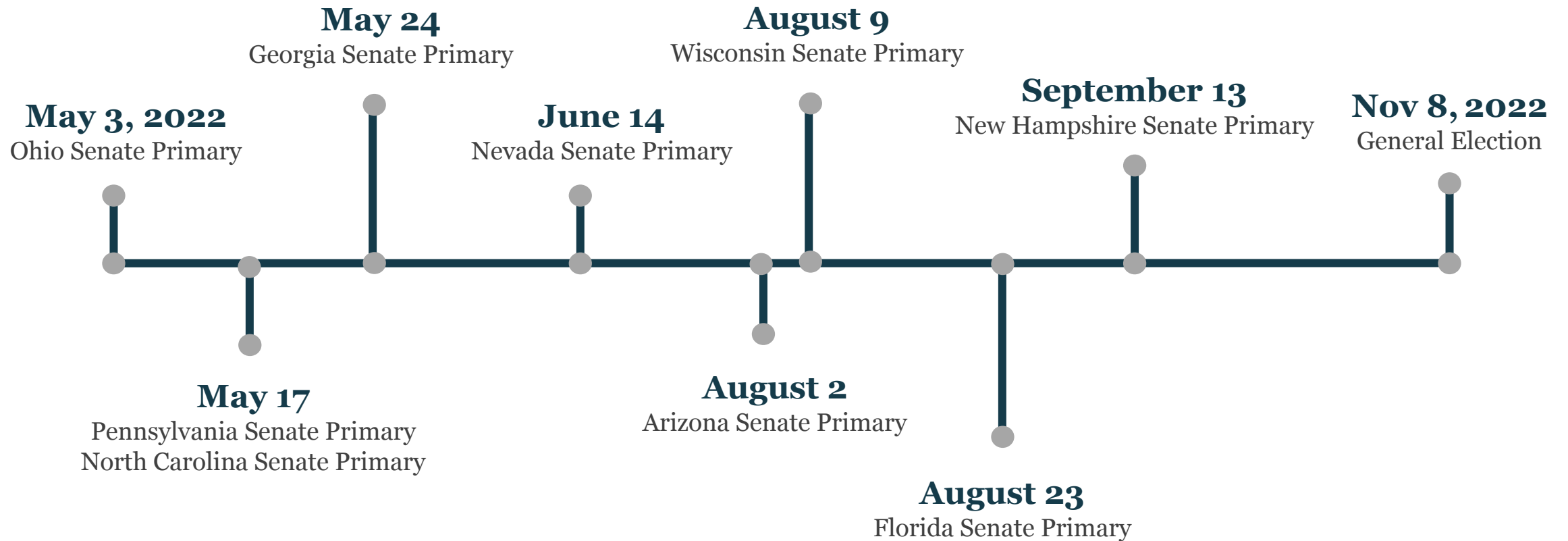
* Ranked "toss-up"

** Ranked "Lean R/Lean D"

Cook Political Report as of 7/7/22



Primary Timeline: Most Competitive Senate Seats





Latest Polls: Most Competitive Senate Seats



Arizona

Mark Kelly

Kelly + 9 (vs Masters)

Kelly +6 (vs Lamon)



Georgia

Raphael Warnock

Warnock -2 (vs Walker)

Warnock +10 (vs Walker)

Warnock +4 (vs Walker)



Nevada

Catherine Cortez Masto

Cortez Masto +3 (vs Laxalt)



New Hampshire

Maggie Hassan

Hassan +9 (vs Bolduc)



Wisconsin

Ron Johnson

Johnson -2 (vs Barnes)

Johnson -2 (vs Godlewski)

Johnson +3 (vs Lasry)

Johnson -1 (vs Nelson)



Pennsylvania

Open

Fetterman +4 (vs Oz)

Fetterman +6 (vs Oz)



Ohio

Tim Ryan

Ryan +9 (vs Vance)

Ryan +12 (vs Vance)

Ryan +9 (vs Vance)

Note: Not all candidates represented in state-wide polling at this point in time

*Based on most recent,
highest rated, state-
wide 538 polls*



House

162

13 12

33

11 12

192

All seats contested; outlook likely to change due to ongoing redistricting litigation

Most Competitive

25 D Toss-Ups

(Open) CA -13
(Open) IL-17
(Davids) KS-03
(Golden) ME-2
(Slotkin) MI-7
(Kildee) MI-8
(Craig) MN-2
(Pappas) NH-1
(Kuster) NH-2
(Titus) NV-1
(Lee) NV-3
(Horsford) NV-4
(Open) NY-3

NY-18 (Open)
NY-19 (Vacant)
OH-9 (Kaptur)
OH-13 (Open)
OR-5 (Open)
PA-8 (Cartwright)
PA-17 (Open)
RI-02 (Open)
TX-28 (Cuellar)
VA-2 (Luria)
VA-7 (Spanberger)
WA-8 (Schrier)

8 R Toss-Ups

CA-22 (Valadao)
CA-27 (Garcia)
CO-8 (New)
MI-3 (Meijer)
NC-13 (Open)
NM-2 (Herrell)
NY-22 (Open)
OH-1 (Chabot)

Competitive

12 Lean D

AZ-04 (Stanton)
CA-09 (Harder)
CA-47 (Porter)
CA-49 (Levin)
CT-05 (Hayes)
IL-6 (Casten)
IL-13 (Open)
IN-1 (Mrvan)
MD-6 (Trone)
NC-1 (Open)
NY-17 (Maloney)
TX-34 (Merged)

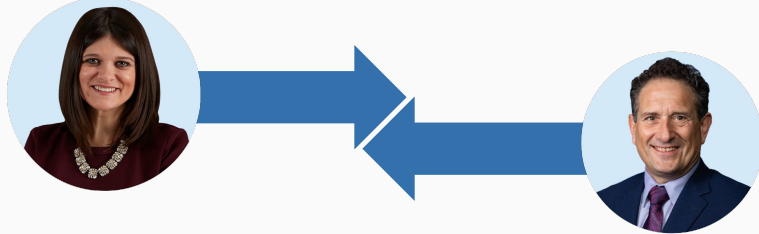
11 Lean R

AZ-1 (Schweikert)
AZ-6 (Open)
CA-40 (Calvert)
CA-45 (Steel)
IA-3 (Axne)
MI-10 (Open)
NJ-7 (Malinowski)
NY-1 (Open)
PA-07 (Wild)
TX-15 (Open)
WI-3 (Open)

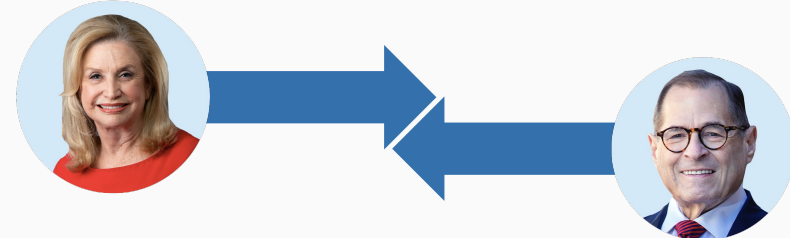


Notable Primaries: Member vs. Member

Upcoming:

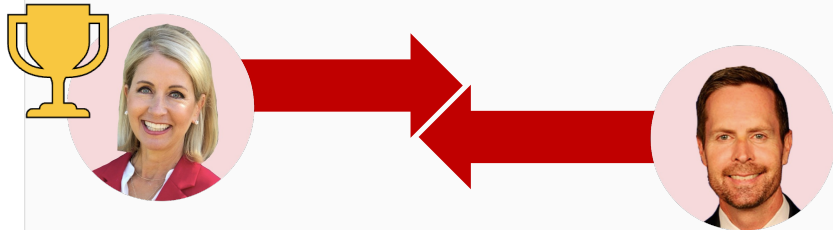


MI-11: Haley Stevens (D) vs. Andy Levin (D)
August 2, 2022

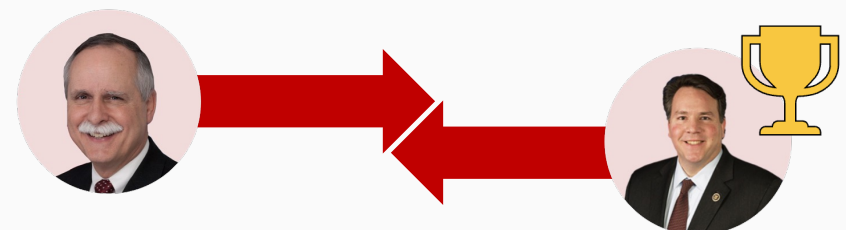


NY-12: Carolyn Maloney (D) vs. Jerry Nadler (D)
August 23, 2022

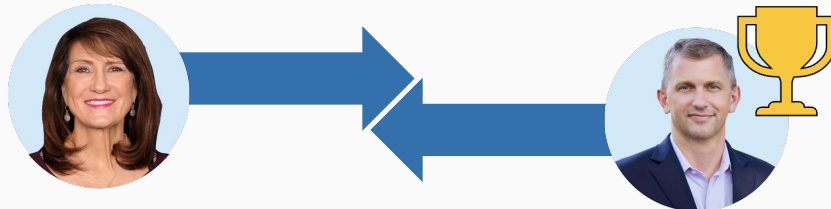
Past:



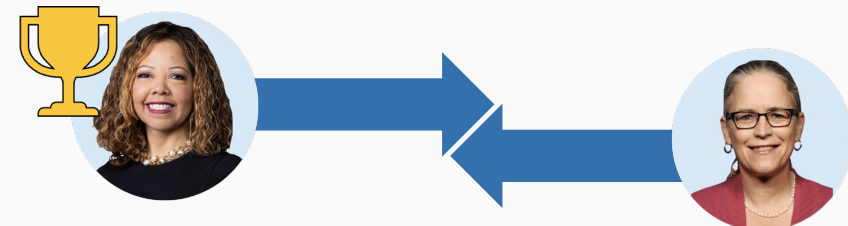
IL-15: Mary Miller (R) vs. Rodney Davis (R)



WV-02: David McKinley (R) vs. Alex Mooney (R)



IL-06: Marie Newman (D) vs. Sean Casten (D)



GA-07: Lucy McBath (D) vs. Carolyn Bourdeaux (D)



Redistricting: Overview

Net Change From Old Maps

+ 6

Democrat-leaning seats

0

Republican-leaning seats

- 6

Highly competitive seats

States Remaining

Louisiana

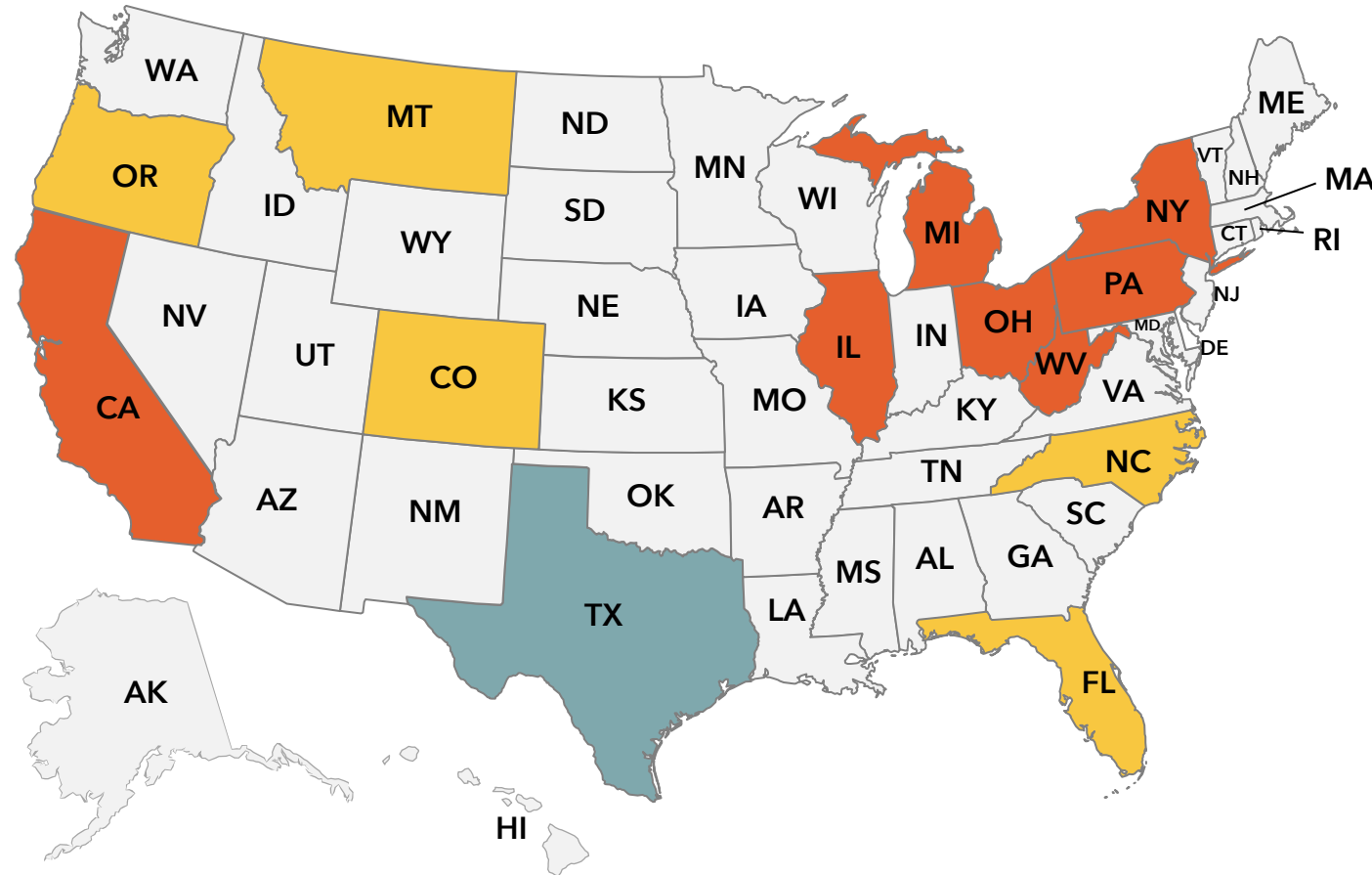
States with Litigation Still Pending

- Alabama
- Arkansas
- Florida
- Georgia
- Kentucky
- Michigan
- Nevada
- New Mexico
- North Carolina
- Ohio
- Pennsylvania
- South Carolina
- Texas
- Utah

Source: 6/28/22, FiveThirtyEight



Redistricting: Outcomes



■ +2 seats ■ +1 ■ 0 ■ -1

- Texas gained the most House seats (2) due to redistricting
- For the first time, California lost one seat
- The industrial North/Midwest was the region with the most seats lost

Source: U.S. Census Bureau and Bloomberg Government



Potential Changes in Committee Leadership: Senate

Senate Committee	Democratic Chair (117 th)	GOP Ranking Member (117 th)
Aging	Bob Casey (PA)	Tim Scott (SC)
Agriculture	Debbie Stabenow (MI)	John Boozman (AR)
Appropriations	Patrick Leahy (VT)	Richard Shelby (AL)
Armed Services	Jack Reed (RI)	Jim Inhofe (OK)
Banking, Housing & Urban Affairs	Sherrod Brown (OH)	Pat Toomey (PA)
Budget	Bernie Sanders (VT)	Lindsey Graham (SC)
Commerce, Science & Transportation	Maria Cantwell (WA)	Roger Wicker (MS)
Energy & Natural Resources	Joe Manchin (WV)	John Barrasso (WY)
Environment & Public Works	Tom Carper (DE)	Shelley Moore Capito (WV)
Finance	Ron Wyden (OR)	Mike Crapo (ID)
Foreign Relations	Bob Menendez (NJ)	Jim Risch (ID)
Health, Education, Labor & Pensions	Patty Murray (WA)	Richard Burr (NC)
Homeland Security & Governmental Affairs	Gary Peters (MI)	Rob Portman (OH)
Indian Affairs	Brian Schatz (HI)	Lisa Murkowski (AK)
Intelligence	Mark Warner (VA)	Marco Rubio (FL)
Judiciary	Dick Durbin (IL)	Chuck Grassley (IA)
Rules & Administration	Amy Klobuchar (MN)	Roy Blunt (MO)
Small Business & Entrepreneurship	Ben Cardin (MD)	Rand Paul (KY)
Veterans' Affairs	Jon Tester (MT)	Jerry Moran (KS)

Strikethrough: Retiring members **Bold:** Members up for election in 2022 **Underline:** term-limited

Source: Bloomberg Government



Potential Changes in Committee Leadership: House

House Committee	Democratic Chair (117 th)	GOP Ranking Member (117 th)
Agriculture	David Scott (GA)	Glenn Thompson (PA)
Appropriations	Rosa DeLauro (CT)	Kay Granger (TX)
Armed Services	Adam Smith (WA)	Mike Rogers (AL)
Budget	John Yarmuth (KY)	Jason Smith (MO)
Education & Labor	Bobby Scott (VA)	<u>Virginia Foxx (NC)</u>
Energy & Commerce	Frank Pallone (NJ)	Cathy McMorris Rodgers (WA)
Financial Services	Maxine Waters (CA)	Patrick McHenry (NC)
Foreign Affairs	Gregory Meeks (NY)	Michael McCaul (TX)
Homeland Security	Bennie Thompson (MS)	John Katko (NY)
House Administration	Zoe Lofgren (CA)	Rodney Davis (IL)
Intelligence	Adam Schiff (CA)	Mike Turner (OH)
Judiciary	Jerry Nadler (NY)	Jim Jordan (OH)
Natural Resources	Raúl Grijalva (AZ)	Bruce Westerman (AR)
Oversight & Government Reform	Carolyn Maloney (NY)	James Comer (KY)
Rules	Jim McGovern (MA)	Tom Cole (OK)
Science, Space & Technology	Eddie Bernice Johnson (TX)	Frank Lucas (OK)
Small Business	Nydia Velázquez (NY)	Blaine Luetkemeyer (MO)
Transportation & Infrastructure	Peter DeFazio (OR)	Sam Graves (MO)
Veterans' Affairs	Mark Takano (CA)	Mike Bost (IL)
Ways & Means	Richard Neal (MA)	Kevin Brady (TX)

Strikethrough: Retiring members

Underline: term-limited

Source: Bloomberg Government



Gubernatorial Elections

- **Current Landscape:** There are **23** Democrat governors and **27** Republican governors
- **2022:** Gubernatorial elections will be held in **36** states
 - Democrats are defending **16** seats (includes **3** open seats)
 - Republicans are defending **20** seats (includes **5** open seats)
- There are **6** states with races considered to be “toss-ups”
 - Arizona (**Open**)
 - Georgia (**Kemp**)
 - Kansas (**Kelly**)
 - Michigan (**Whitmer**)
 - Nevada (**Sisolak**)
 - Wisconsin (**Evers**)

Sources: FiveThirtyEight, Cook Political Report