

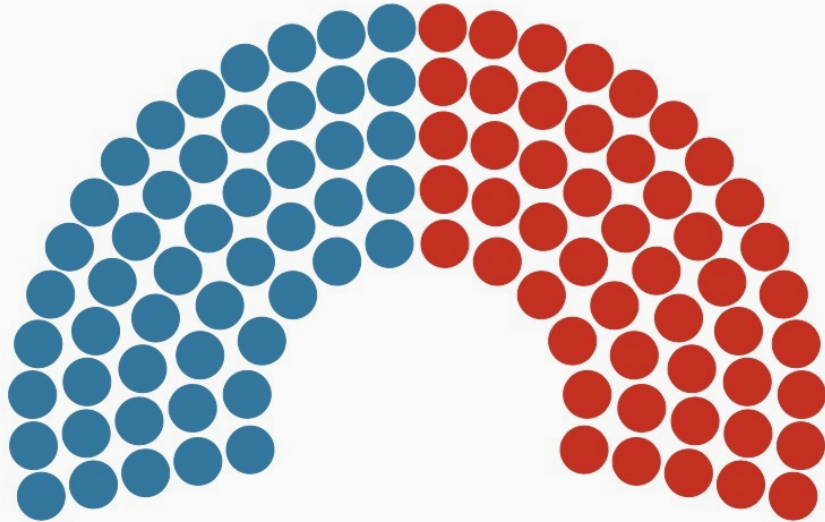


2022 Midterm Outlook

September 19, 2022
– 50 Days Until Election Day –



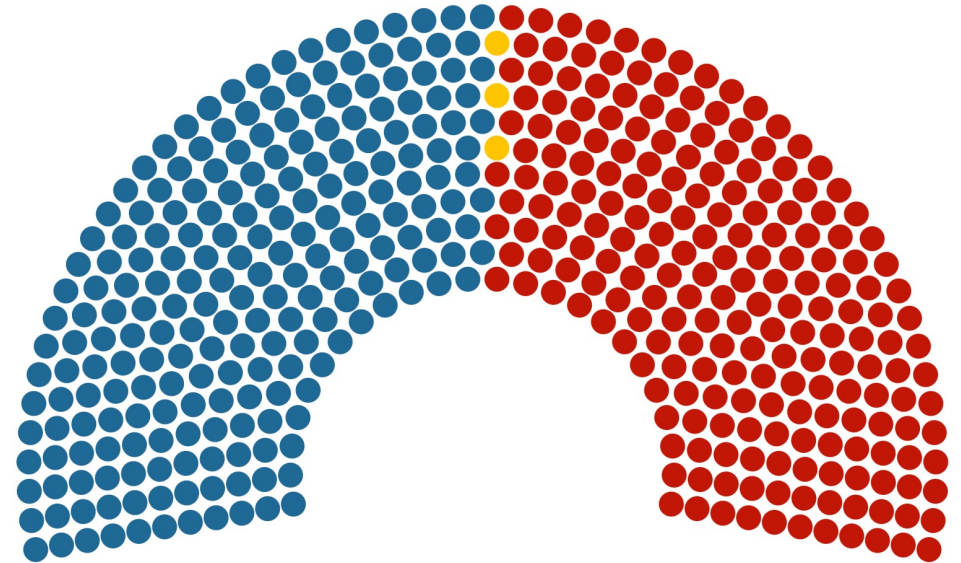
What's at Stake: Current Balance of Power



U.S. Senate
50 Ds – 50 Rs

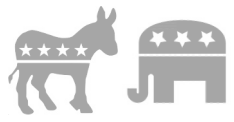
(Includes 2 independents who participate in the Democratic caucus; VP Harris serves as tiebreaking 51st vote)

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



House of Representatives
221 Ds – 212 Rs

(3 vacancies: AK-At Large, IN-2, FL-13)

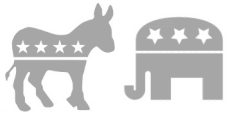


What's at Stake: Overview

- All House seats contested; Republicans must flip **4** seats currently held by Democrats to gain a majority *
- **35** Senate seats contested: **14** Democratic-controlled, **21** Republican-controlled **
- Many Members not seeking re-election
 - House: **38** Democrats, **27** Republicans
 - Senate: **1** Democratic member, **6** Republicans

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

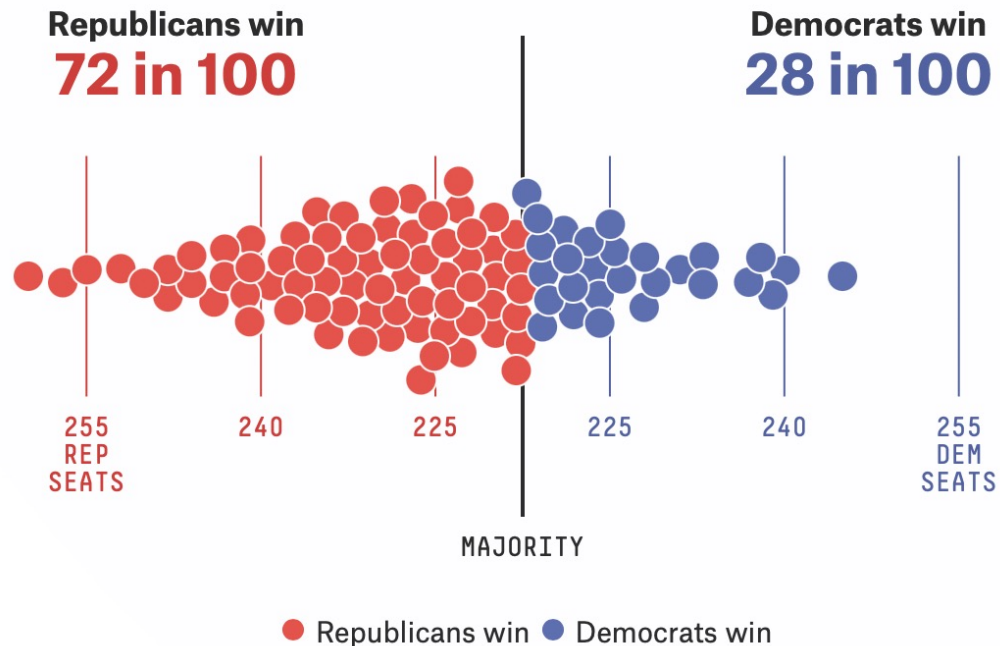
*** Includes special election to finish Sen. Inhofe's (R-OK) term*



Congress Prediction: Republican Control of House vs. Senate

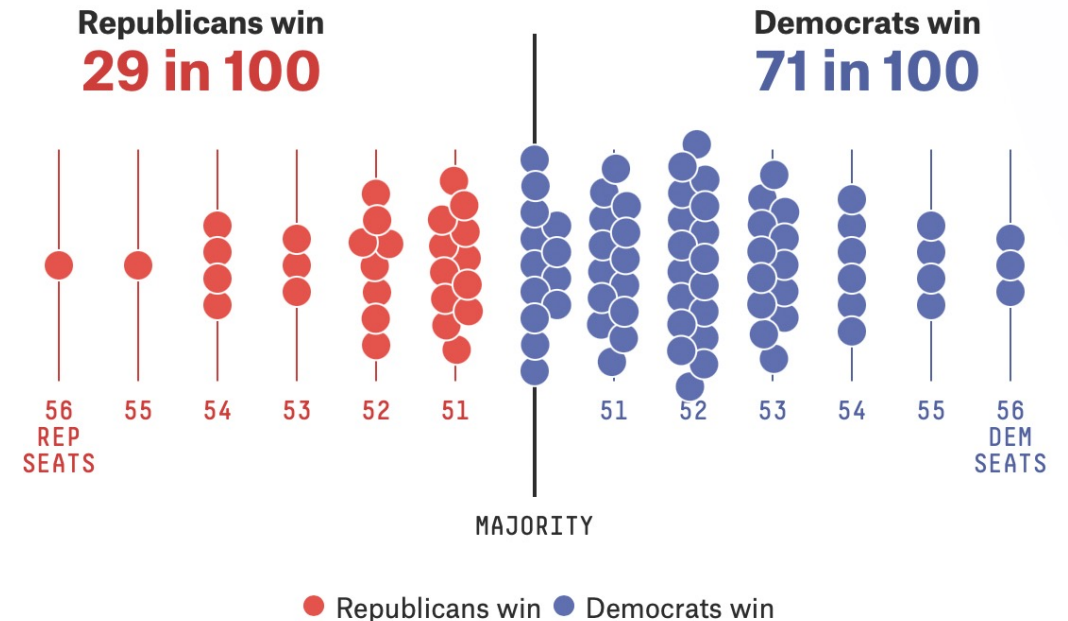
House: Republicans *avored* to win

Republicans have a 72% chance of taking over the House



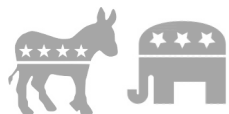
Senate: Democrats *avored* to win

Republicans' best chances of gaining a seat are in Georgia and Nevada; Democrats' best chance is in Pennsylvania



Source 9/17/22, FiveThirtyEight

*Data from Deluxe model stimulates the election 40,000 times to see who wins most

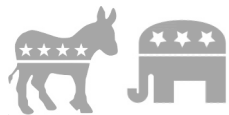


What's at Stake: Overview

- 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?

“We didn't gain seats when President Biden won. We worked together to win the Senate, win the House and win the White House. The members who won in Trump districts are in strong shape. I have absolutely no intention of us losing the election and we will win it one election at a time on the ground through mobilization, strong progressive messages, and funding. Our Democracy is on the ballot and these ‘kitchen issues’ such as inflation are being addressed by the Administration.” – ***House Speaker Nancy Pelosi, June 2022***

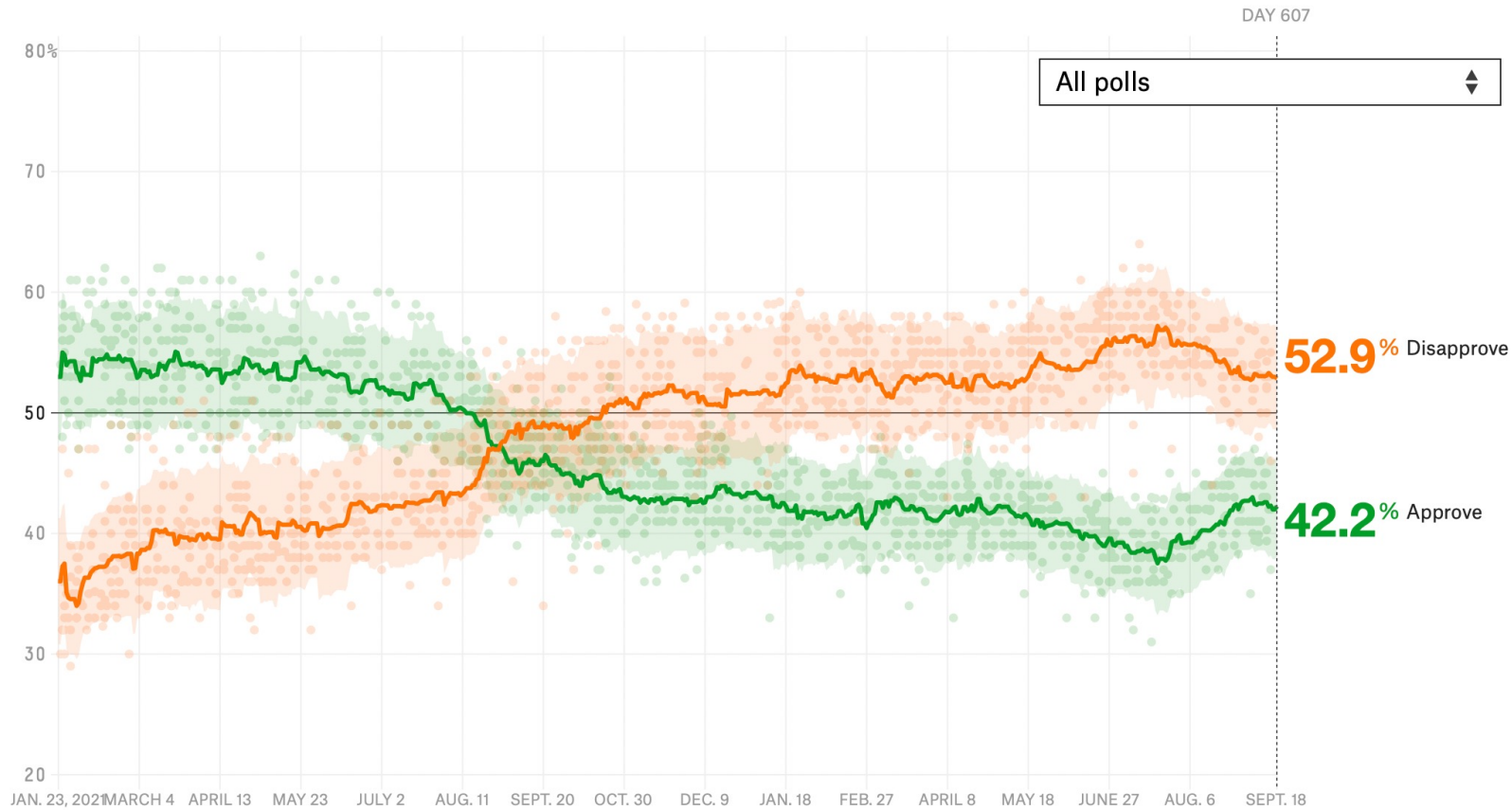
“I’m not focusing on [whether Biden should or should not run], if we get a couple more seats in the Senate — right now, if the election were held today, we would pick up a few seats. We’re doing great. And you have many listeners in ... Pennsylvania, in Wisconsin, in North Carolina, in Ohio. Those states we can win Republican seats,” ***Senate Majority Leader Chuck Schumer, August 2022***

“I think there’s probably a greater likelihood the House flips than the Senate. Senate races are just different — they're statewide, candidate quality has a lot to do with the outcome,” – ***Senate Minority Leader Mitch McConnell, August 2022***

“This should be a really huge year for Republicans just because of the failures of the Democrats who are in control of everything and Biden’s low approval ratings, but we could blow it by nominating unelectable people—and that’s exactly what’s happening across the country and why the wave is going to be more of a ripple rather than a tidal wave.” – ***Maryland Gov. Larry Hogan, August 2022***



Public Sentiment: Biden Approval Rating



President Biden's Approval Rating
9/17/2022 (FiveThirtyEight)

How Do Other Presidents' Approval Ratings Compare?*



40% 9/15/2018



46% 9/12/2010



70% 9/13/2002



42% 9/7/1994

*Represents approval polling on Gallup
Presidential Job Approval Center



Presidential Approval Impact: Those who are "meh" about Biden are voting for Democrats

| Date | Generic Ballot (D/R) | Somewhat disapprove of sitting President planning to vote D/R | Gap between generic and 'not so strongly' disapprovers |
|--------------------------|----------------------|---|--|
| June 1994 (Clinton) | 47/45 | 33/58 16% | -27 |
| September 1998 (Clinton) | 46/45 | 23/69 8% | -47 |
| June 2006 (W. Bush) | 46/44 | 87/4 7% | -81 |
| September 2010 (Obama) | 47/44 | 29/55 16% | -29 |
| May 2018 (Trump) | 48/43 | 64/32 5% | -27 |
| August 2022 (Biden) | 44/42 | 43/29 17% | 12 |

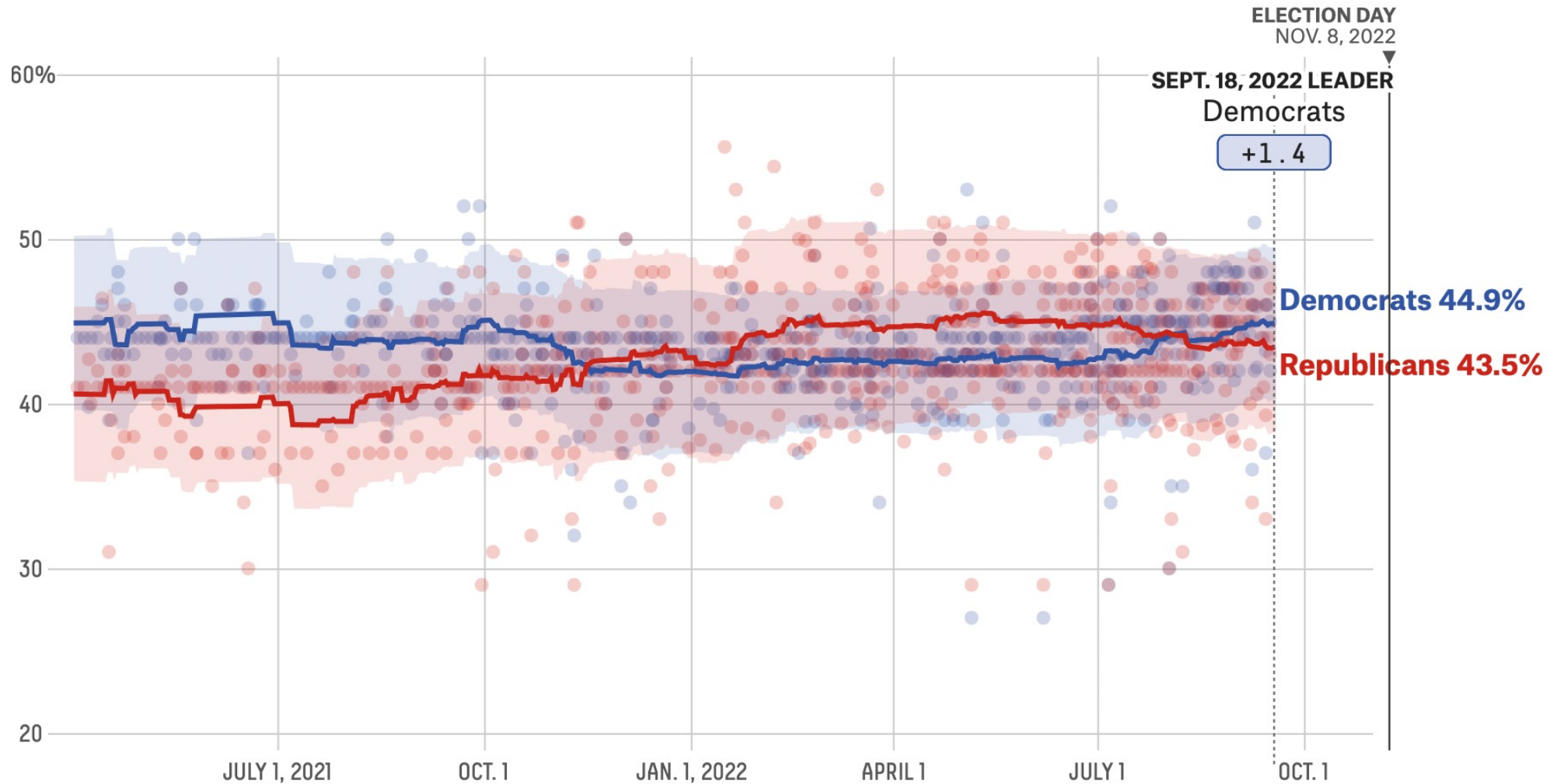
- In the last five midterm elections for which Pew had data, "somewhat disapprovers" of the sitting president have never been this supportive of his party in the upcoming election.
- Among the voters who say they "somewhat disapprove" of Biden, 43 percent say they are planning to vote Democratic this fall.
- In the Pew survey, 28 percent of 'somewhat disapprovers' are undecided about their vote choice this fall.

Source: 9/6, Cook Politico Report



Public Sentiment: Generic Ballot

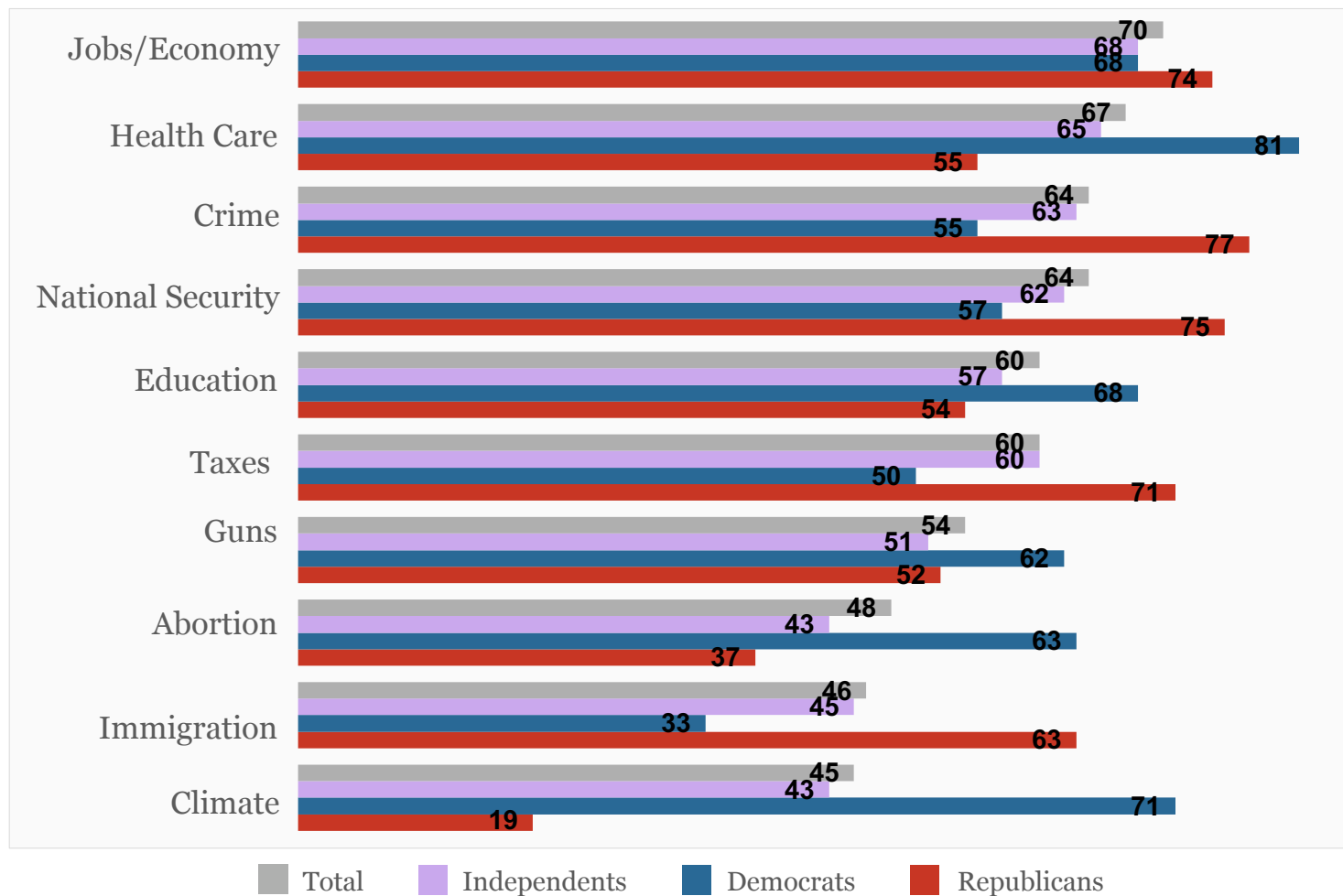
Estimate based on polls that inquire which party voters would support in an election





Public Sentiment: Key Issues for Voters

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



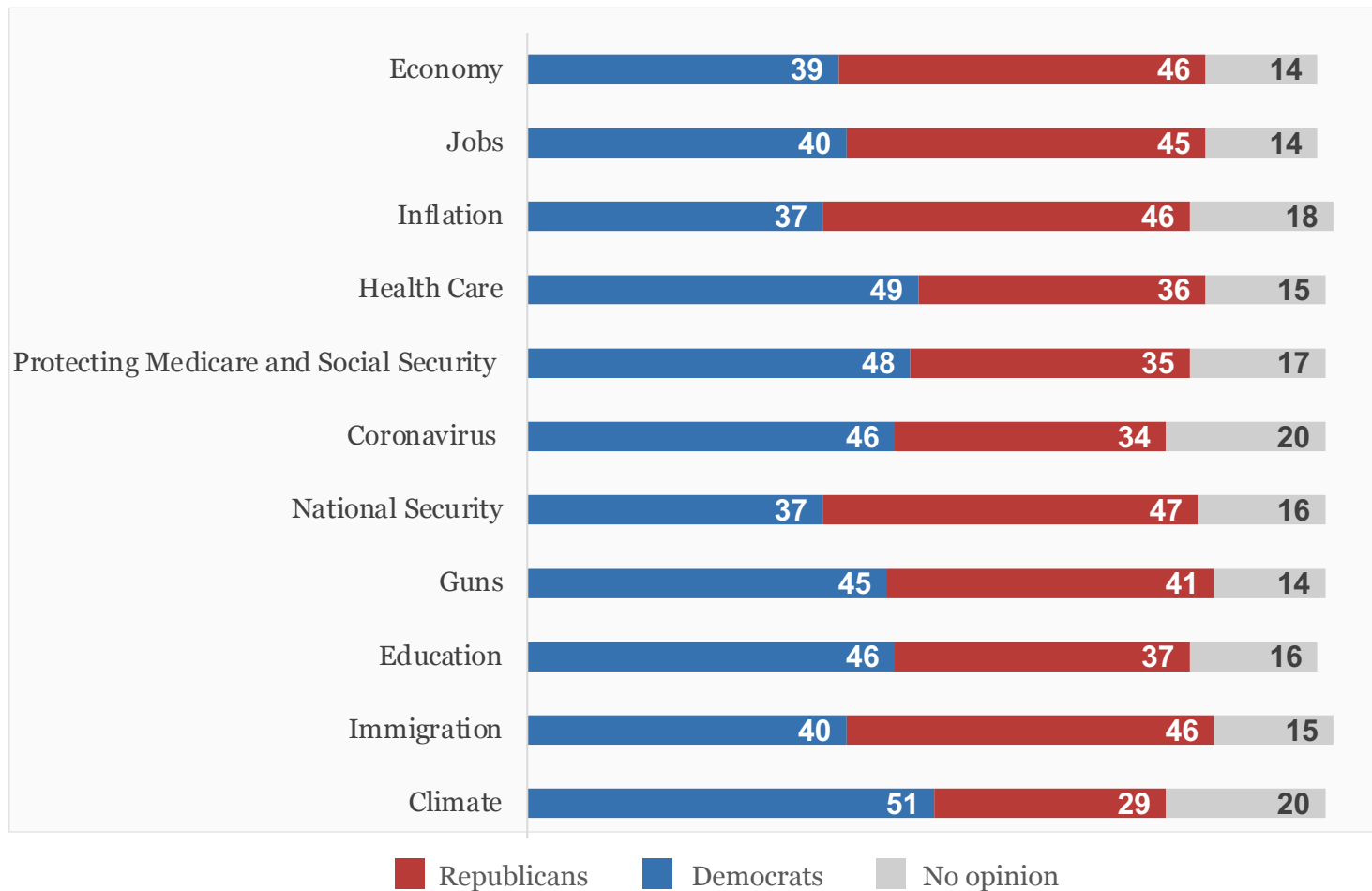
- Jobs/Economy are the public’s top concern, followed by health care.
- Notably, following the climate surrounding abortion after the *Dobbs* decision, the issue increased importance among Democrats by 22 points since the June *Dobbs* decision.
- For Republicans, crime is the top issue area, followed by national security and jobs and economy
- Wide partisan gaps remain on a number of issues, but a majority in both parties are concerned with jobs and the economy, health care, crime, national security, education, taxes, and gun policy.

Source: Economist/YouGov survey of U.S. adults conducted 9/12/2022



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, and national security
- Democrats hold an advantage with voters concerned about health care, protecting Medicare and Social Security, Coronavirus, gun policy, education, and climate

*Source: Morning Consult-Politico poll of U.S. adults
conducted 8/12 – 8/14/22*

Midterm Indicator: Will Kansas Voter Turnout Set the Tone?

Kansas Voters Decide 'No' on Abortion Amendment During Primaries

June 24, 2022: *Dobbs v. Jackson Women's Health Organization* decision by Supreme Court; effectively overturning *Roe v. Wade*



June 24-July 7, 2022: Largest % of voter registration nationwide, up 332%



June 24-July 7, 2022: Kansas Vote.Org site experienced 1,000% increase in registered voters



June 24-July 7, 2022: 500% or more increase in voter registrations since *Roe* decision in states including: Michigan, Indiana, Ohio, Texas, and Tennessee

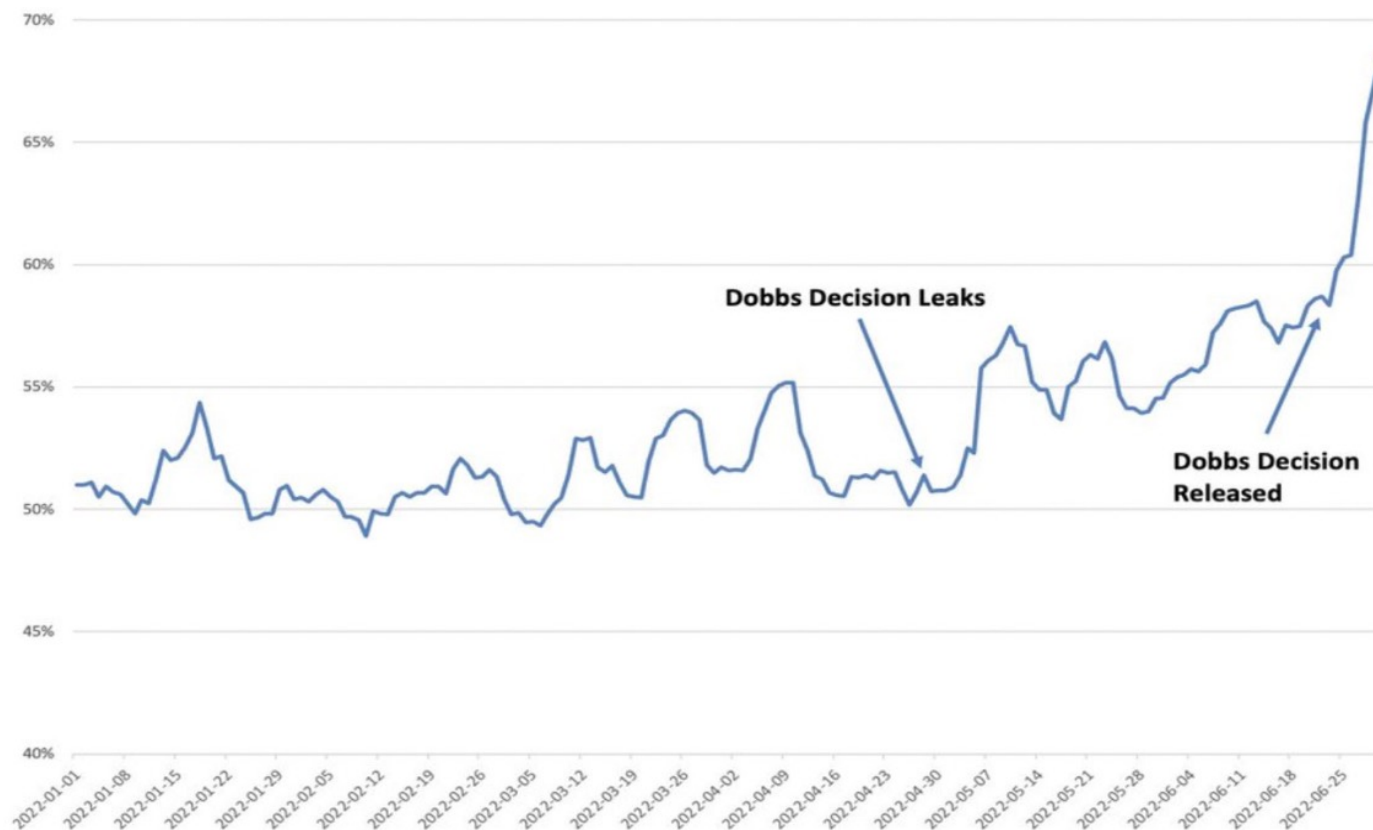
** Of those people, visiting Vote.Org website to register or verify their registration, 65% were women and almost half, 47%, were under the age of 35.*

Source: 8/4, Vote.Org and MSNBC
Report



Midterm Indicator: How Abortion Changed the Kansas Electorate

Percent of new female registrants in Kansas (7 day average)

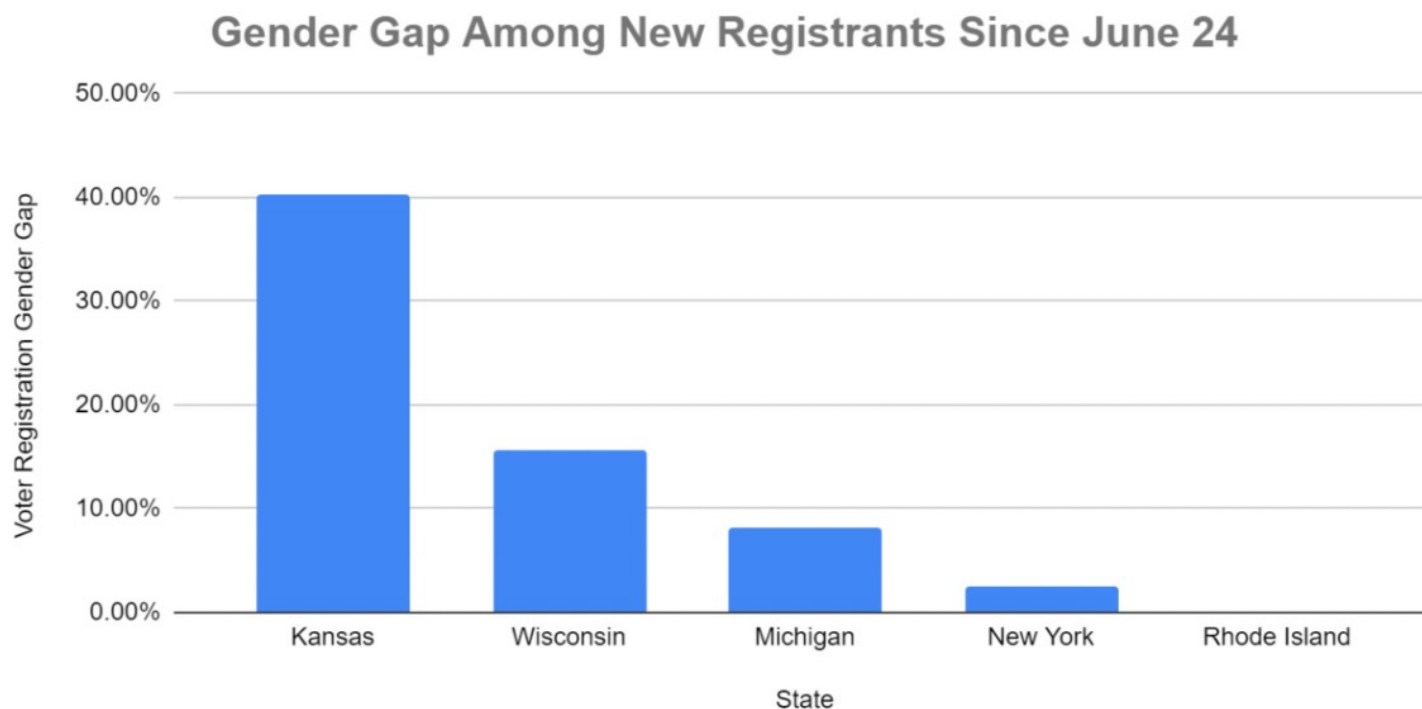


- Kansas voters turned out in a red state where Trump beat Biden 56.2% to 41.6% in 2020 and Republicans outnumber Democrats by almost 400,000 registered voters
- Among Kansans who registered to vote on or after June 24, the days following *Dobbs* decision, Democrats have had an 8-point advantage
- 70% of Kansans who registered to vote after *Dobbs* were women

Source: 8/3, Target Smart



Midterm Indicator: Not Just Kansas; Women Motivated To Vote Post *Dobbs* Decision



- In Wisconsin, abortion care has stopped post *Dobbs*. Among new registrants since June 24, women have out-registered men by 15.6% and Democrats make up 52.36% of all newly registered voters compared with 16.59% of Republicans.
- In Michigan, the *Dobbs* decision revived a state abortion ban making it a felony. Notably, among the 12,879 new voters, women are out-registering men by 8.1% and Democrats out-registering Republicans by 18 percentage points.

Source: 8/3, Target Smart



Public Engagement: Primary Turnout by Party

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

+ 5%

Turnout increase overall

- 6%

Turnout increase among Democrats

+ 18%

Turnout increase among Republicans

+ 6 pt

Increase in Republican % of electorate

MI, CO, IA, KY, NC, NV, PA,
WV, WI, NH

Flipped electorates

*Source: 9/18, JMC Analytics & Polling
Subject to change as more data comes in*

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

*** CA projected*

**** Flipped electorates: Republican share of electorate changed from less than 50% to more than 50%*



Recent Primaries: The Trump Effect

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

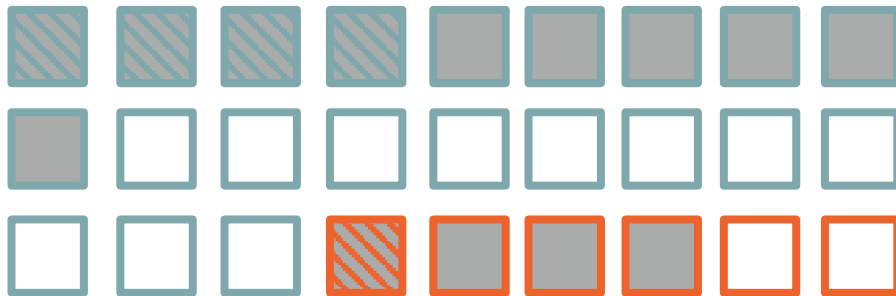
Senate

8 won and 0 lost out of 9 endorsements



House

21 won and 6 lost out of 27 endorsements



29

➤ Trump-endorsed candidates who won in races considered competitive

5

➤ Winning candidates who were challengers to incumbents

6

➤ Trump-endorsed candidates who lost in races considered competitive

3

➤ Losing candidates who were challengers to incumbents



Open Seat



Endorsee is incumbent



Won



Lost

Source: 9/16/22, *Axios*
Note: Data only includes races in which at least two candidates have a reasonable chance of winning



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 Democratic candidates minus total share for Republican candidates



Senate



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

* Ranked "toss-up"

** Ranked "Lean R/Lean D"

Cook Political Report as of 8/18/22



2010 Senate Elections: Missed Opportunities?

2010: *Republicans defended 18 seats and Democrats defended 19 seats. Republicans needed 10 to gain majority in Senate*

Democrats defended several vulnerable seats including: ND, DE, AR, NV, IN, PA, CO, of those Republicans won ND, AR, IN, PA, but did not win DE, NV

2010



Nevada:

Harry Reid vs. Sue Lowden



Delaware

Chris Coons vs. Christine O'Donnell

2022

Pennsylvania

John Fetterman's vs. Dr. Mehmet Oz

Arizona

Mark Kelly (Incumbent) vs. Blake Masters

Nevada

Catherine Cortez Masto (Incumbent) vs. Adam Laxalt

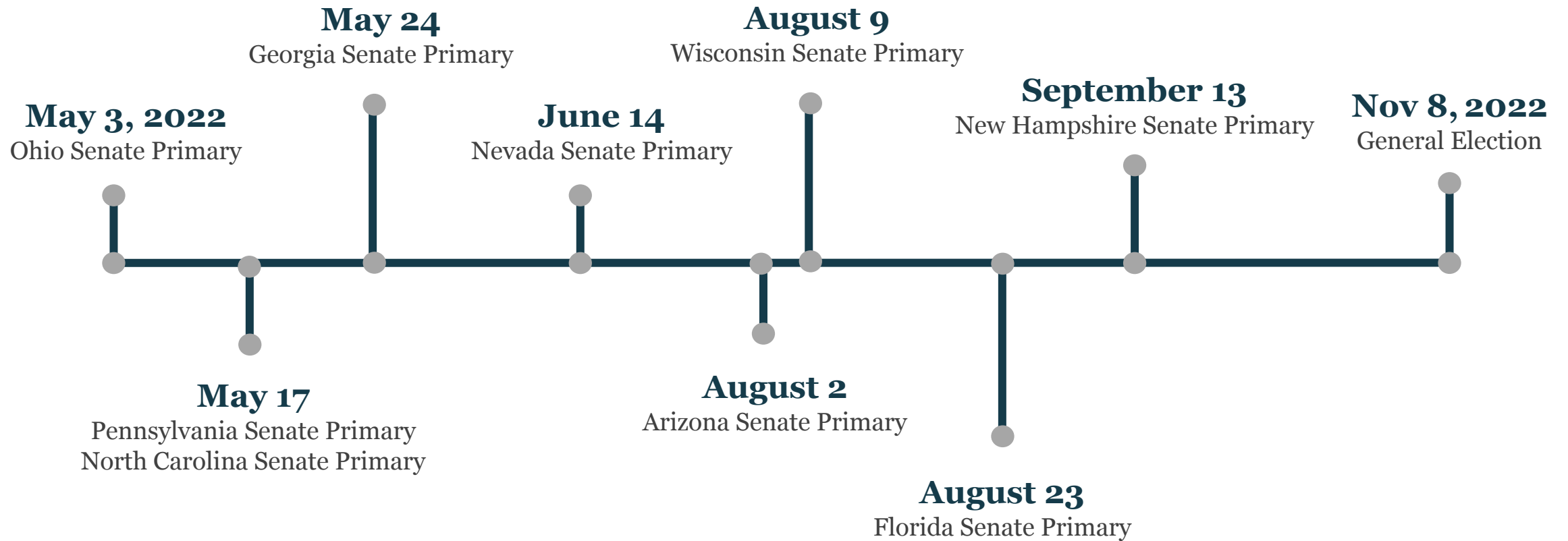
Georgia

Raphael Warnock (Incumbent) vs. Herschel Walker

Source: Politico, 10/9/2009



Primary Timeline: Most Competitive Senate Seats





Latest Polls: Most Competitive Senate Seats



Arizona

Mark Kelly

Kelly + 1 (vs Masters)



Georgia

Raphael Warnock

Warnock +6 (vs Walker)



Nevada

Catherine Cortez Masto

Cortez Masto -1 (vs Laxalt)



New Hampshire

Maggie Hassan

Hassan +11 (vs Bolduc)



Wisconsin

Ron Johnson

Johnson +1 (vs Barnes)



Pennsylvania

Open

Fetterman +2 (vs Oz)



Ohio

Tim Ryan

Ryan -4 (vs Vance)

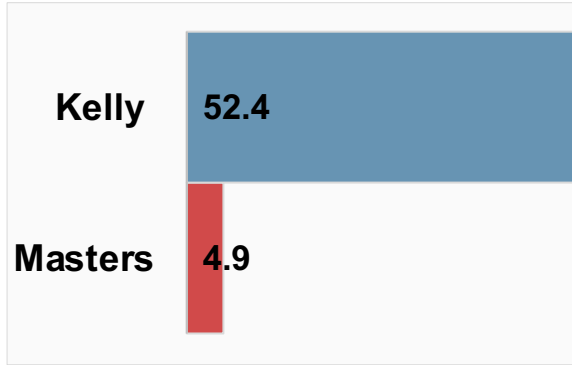
Note: Not all candidates represented in state-wide polling at this point in time

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

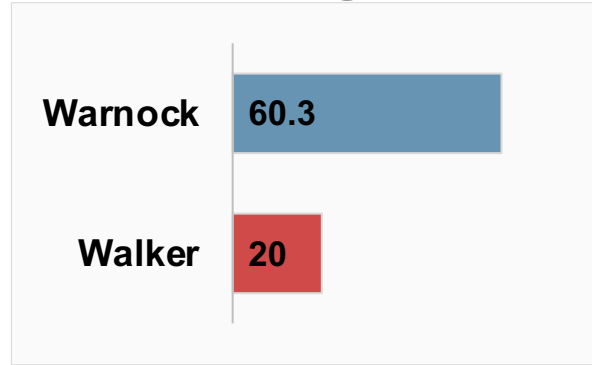


Latest Fundraising: Most Competitive Senate Seats

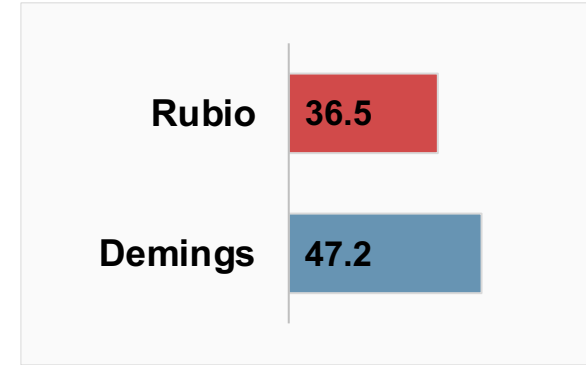
Arizona



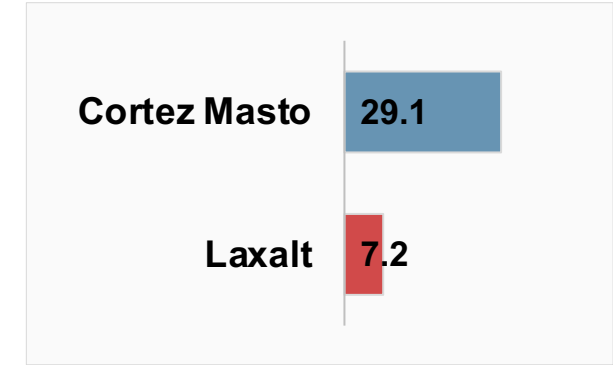
Georgia



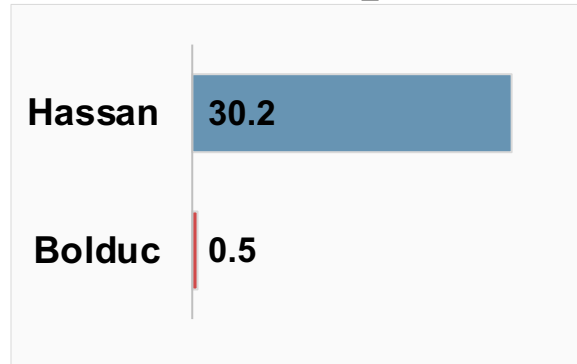
Florida



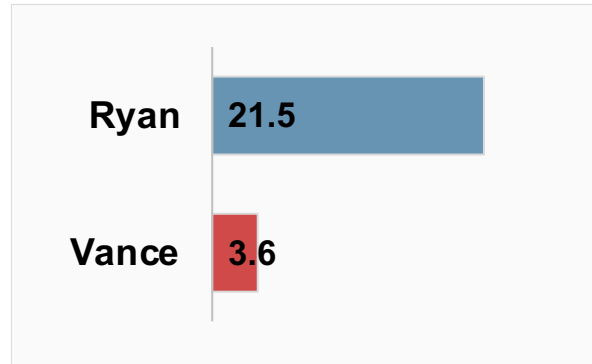
Nevada



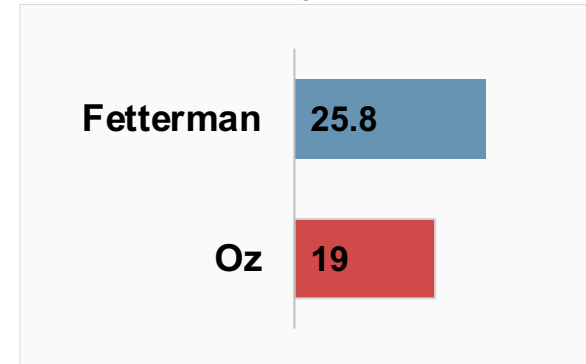
New Hampshire



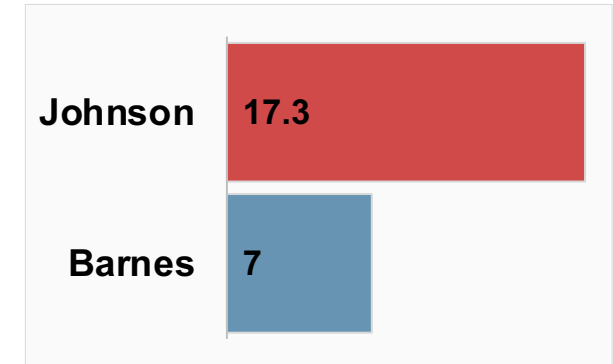
Ohio



Pennsylvania



Wisconsin



Total funding raised (in millions), as of 9/17
Source: OpenSecrets



House

162

11 14

34

11 15

188

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

Most Competitive

23 D Toss-Ups

(Open) CA -13
(Peltola) – AK-AL
(Open) IL-17
(Mrvan) IN-1
(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
NY-19 (Open)
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

16 Lean D

CA-09 (Harder)
CA-47 (Porter)
CA-49 (Levin)
CT-05 (Hayes)
IL-6 (Casten)
IL-13 (Open)
MI-03 (Open)
MD-6 (Trone)
NC-1 (Open)
NY-17 (Maloney)
NY-18 (Ryan)
TX-34 (Merged)
OR-04 (Open)
OR-06 (New Seat)
NY-3 (Open)
(Kuster) NH-2

11 Lean R

AZ-1 (Schweikert)
AZ-6 (Open)
CA-41 (Calvert)
CA-45 (Steel)
IA-03 (Axne)
NJ-7 (Malinowski)
NY-1 (Open)
PA-07 (Wild)
TX-15 (Open)
WI-3 (Open)
WA-03 (Open)



Redistricting: Overview

Net Change From Old Maps

+ 6

Democratic-leaning seats

0

Republican-leaning seats

– 6

Highly competitive seats

States Remaining

Louisiana

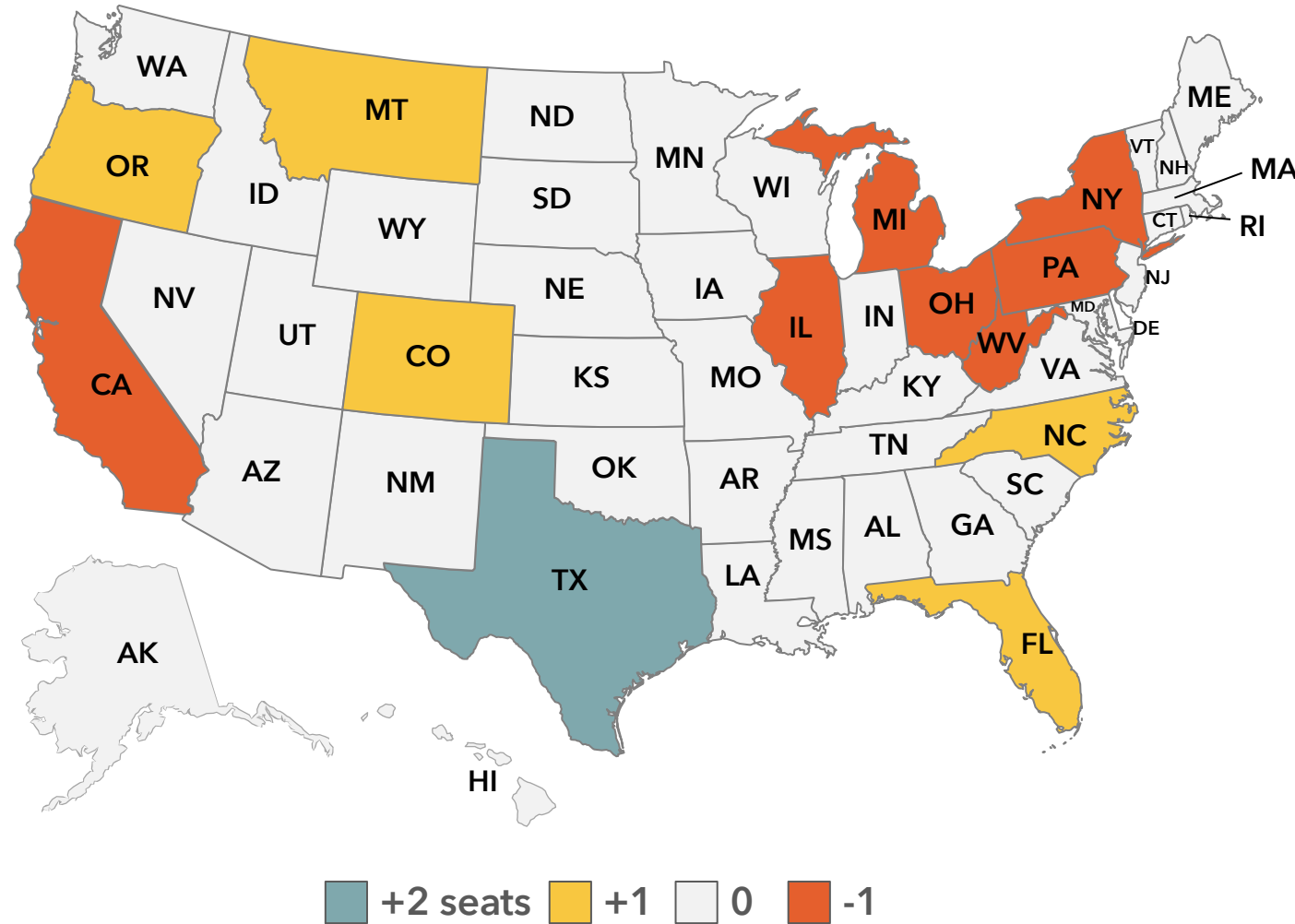
States with Litigation Still Pending

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

Source: 7/19/22, FiveThirtyEight



Redistricting: Outcomes



- 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



Retirements and term-limits 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



Retirements and term-limits 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 **Bold:** Member lost election in 2022 **Underline:** term-limited

Source: Bloomberg Government



Gubernatorial Elections

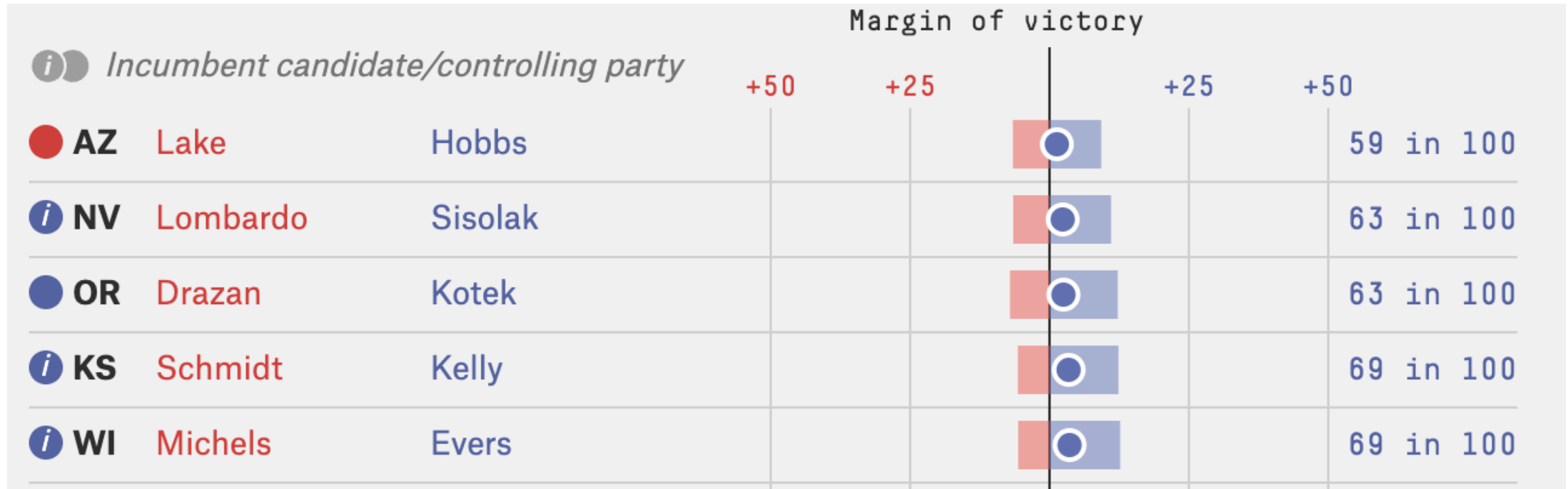
- **Current Landscape:** There are **23** Democratic governors and **27** Republican governors
- **2022:** Gubernatorial elections will be held in **36** states
 - Democrats are defending **16** seats (includes **3** open seats)
 - Republicans are defending **20** seats (includes **5** open seats)
- There are **4** states with races considered to be “toss-ups”*
 - Arizona (**Open**) **Katie Hobbs** vs. **Kari Lake**
 - Kansas (**Kelly**) vs. **Schmidt**
 - Nevada (**Sisolak**) vs. **Lombardo**
 - Wisconsin (**Evers**) vs. **Tim Michels**

Sources: FiveThirtyEight, Cook Political Report

*Opponents for toss-ups will be added after primaries in August



5 Most Competitive Governorship Races in 2022

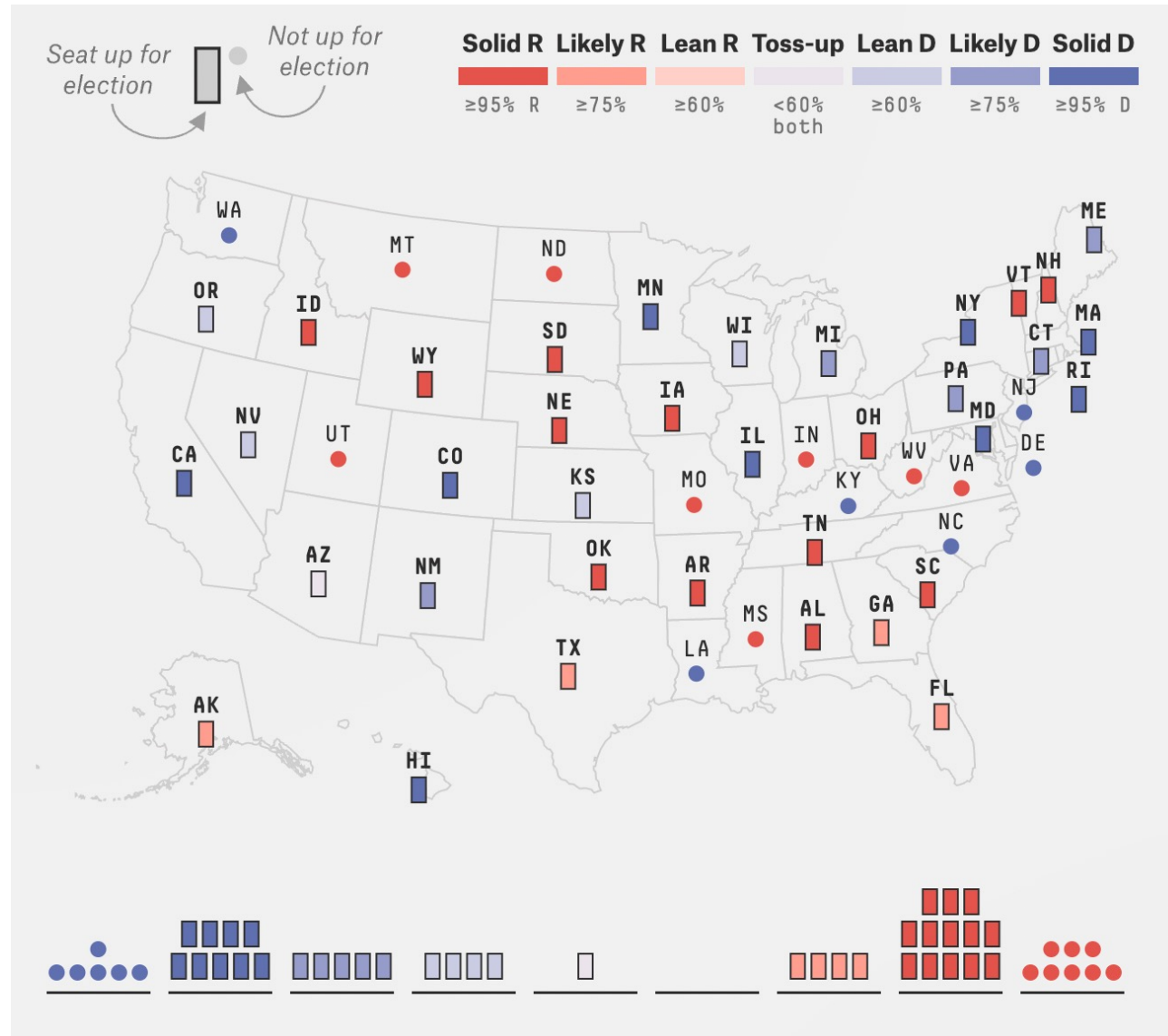


Source: FiveThirtyEight

*Leading candidate's forecasted chance of winning and margin of victory in each state. Dots closer to the line represent tighter races, and wider bars mean more uncertainty about the outcome.



2022 Races: Forecasting Governorships



- Data outlines each party's chances of winning 36 governorships up for reelection
- Estimates 83% chance that Republicans end up with a majority of governorships, compared with a 7% chance for Democrats.
- Notably, 73% chance that the majority of the U.S. population will reside in states run by Democratic governors.

Source: 9/17/22, FiveThirtyEight