

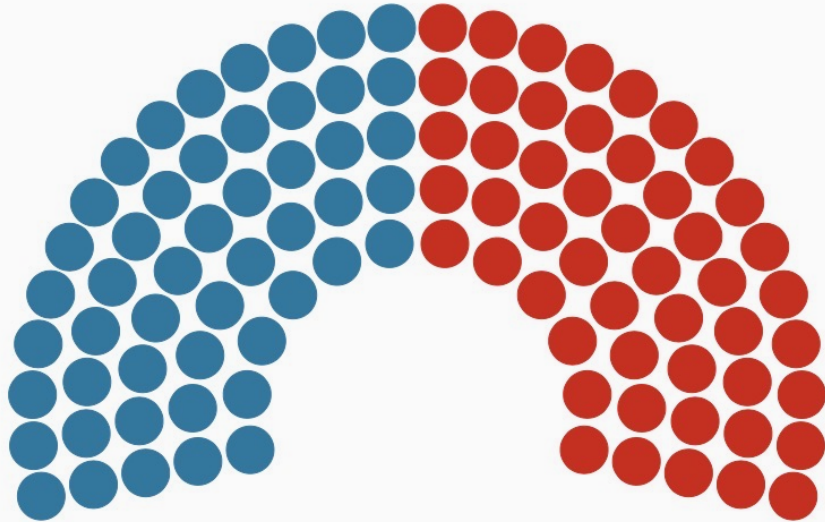


# 2022 Midterm Outlook

**October 18, 2022**  
– 21 Days Until Election Day –



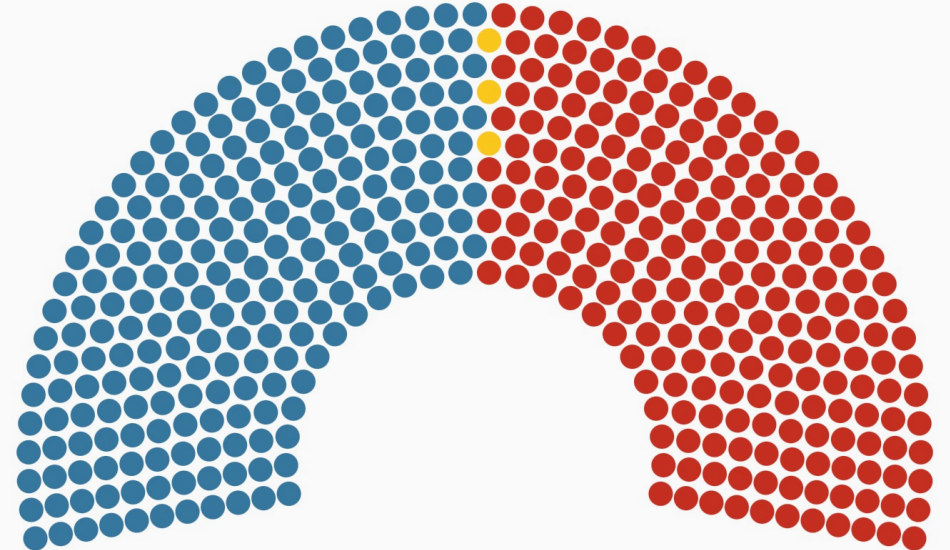
## What's at Stake: Current Balance of Power



**U.S. Senate**  
**50 Ds – 50 Rs**

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

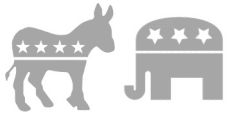
Key races to watch: Arizona, Georgia, Nevada, Pennsylvania, Wisconsin



**House of Representatives**  
**220 Ds – 212 Rs**

(3 vacancies: IN-2, FL-13, FL-22)



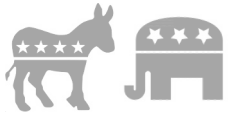


## What's at Stake: Overview

- All House seats contested; Republicans must flip **5** 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, **28** Republicans
  - Senate: **1** Democratic member, **6** Republicans

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

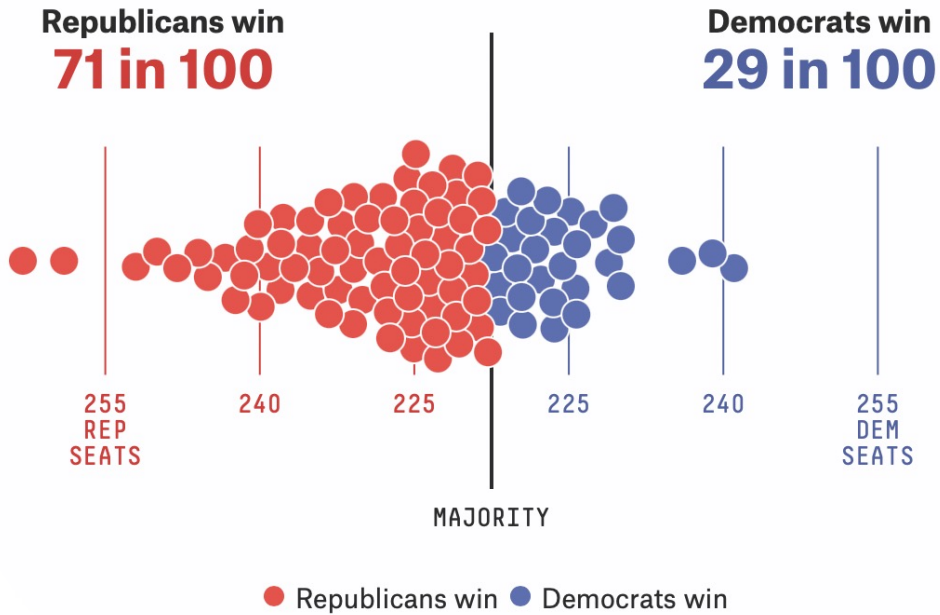
*\*\* Includes special election to finish Sen. Inhofe's (R-OK) term*



# Congress Prediction: Republican Control of House vs. Senate

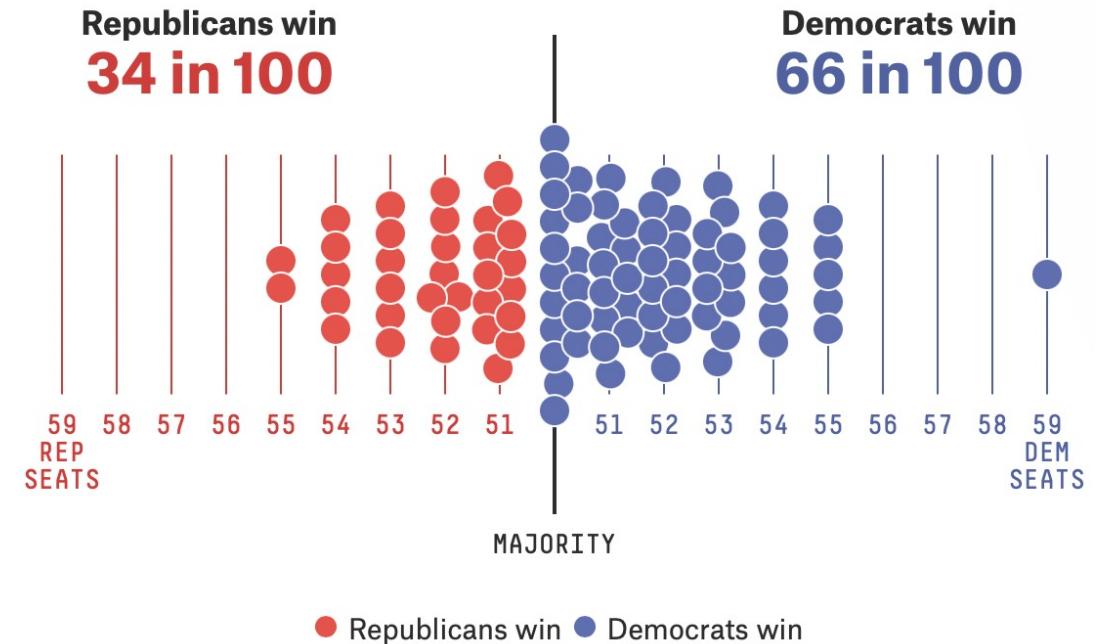
**House:** Republicans *avored* to win

*Republicans have a 71% chance of taking over the House*



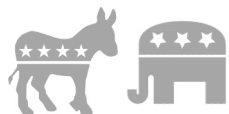
**Senate:** Democrats *avored* to win

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



Source 10/16/22, FiveThirtyEight

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

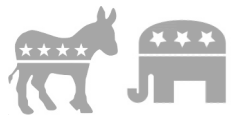


## What's at Stake: Overview

- 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
<b>1998</b>	<b>D</b>	<b>5</b>	<b>0</b>
<b>2002</b>	<b>R</b>	<b>8</b>	<b>1</b>
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***

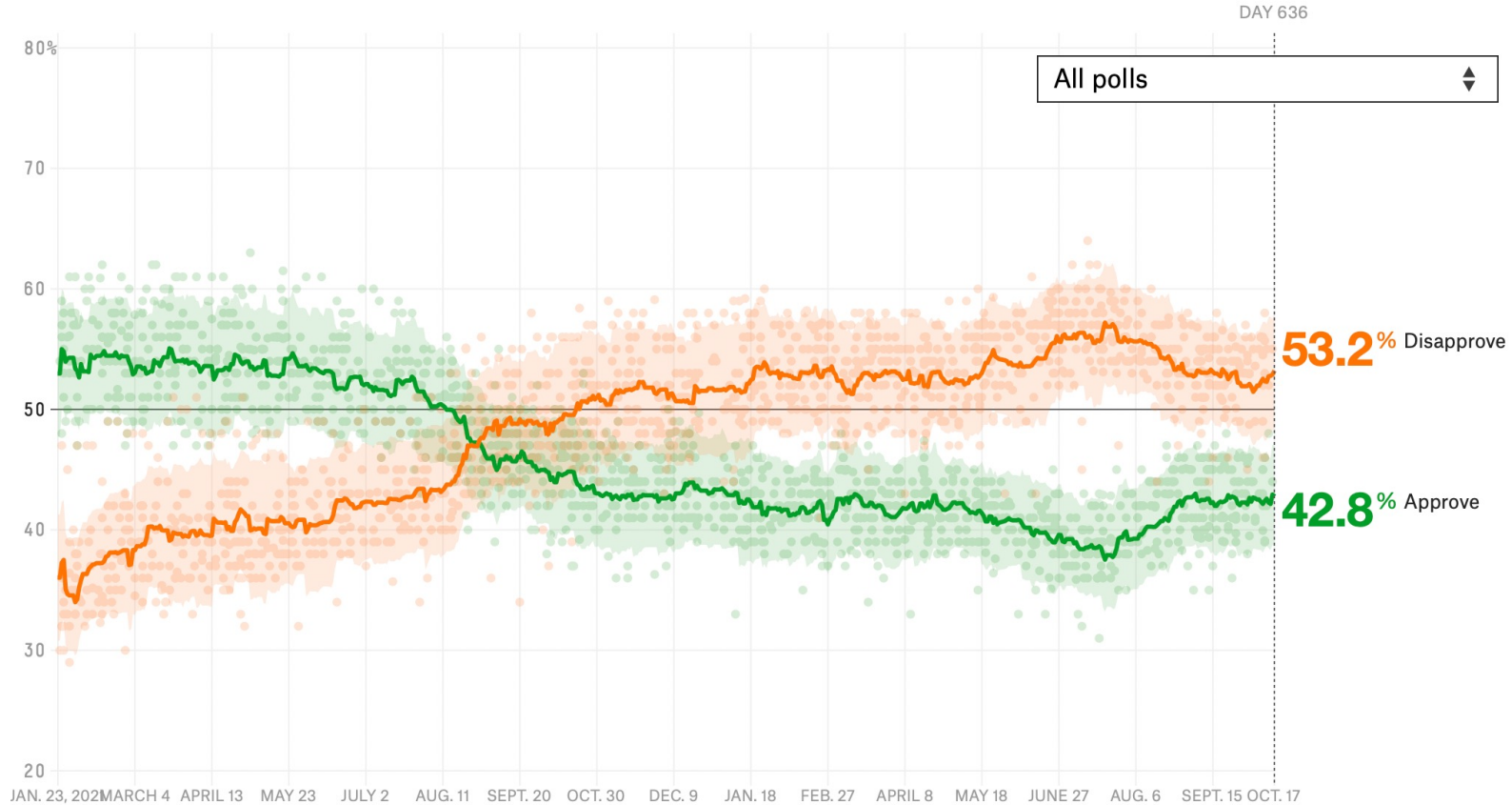
“I’m not focusing on [whether Biden should or should not run], if we get a couple more seats in the Senate — right now, if the election were held today, we would pick up a few seats. We’re doing great. And you have many listeners in ... Pennsylvania, in Wisconsin, in North Carolina, in Ohio. Those states 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  
10/17/ 2022 (FiveThirtyEight)*

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

## How Do Other Presidents' Approval Ratings Compare?\*



43% 9/15/2018



44% 9/12/2010



62% 9/13/2002



41% 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



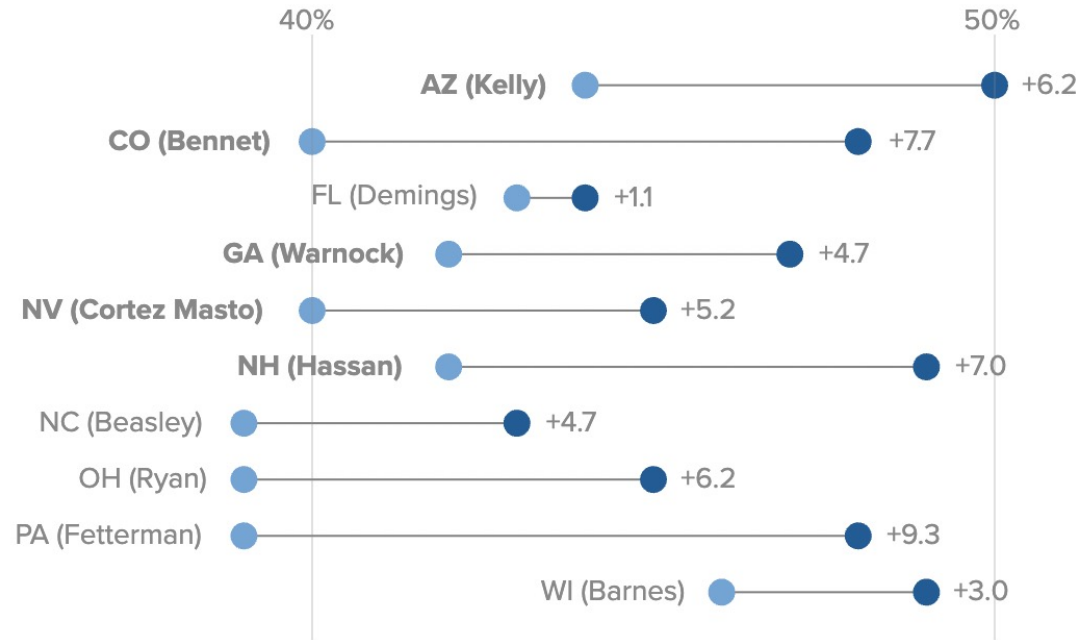


# Presidential Approval Rating: Impact on 2022 Senate Elections

## 2022 Senate Elections

How much ● Democratic candidates' current polling numbers compare to President Biden's most recent recorded approval rating in each state ●. **Bold** denotes an incumbent senator.

● Biden Approval



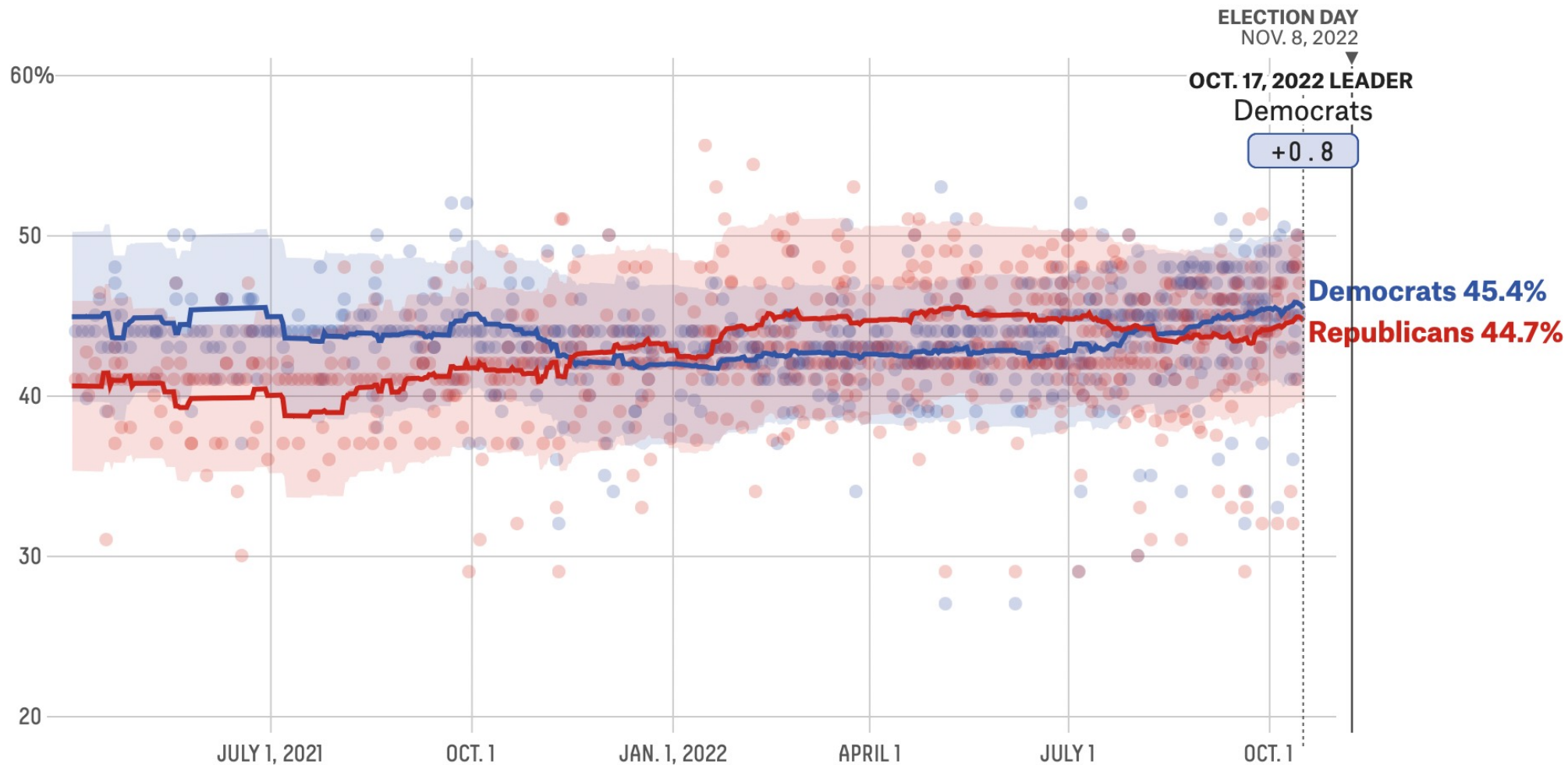
- On average, Democrats are currently outrunning Biden's approval numbers by 5.5 points.
- John Fetterman (*toss up*) is outpacing Biden by 9.3 points compared to his average lead over Republican candidate Dr. Oz.
- Even in states like Ohio, where Biden lost by eight, Democratic nominee Rep. Tim Ryan is running 6.2 points ahead of Biden's current numbers.

Source: 9/9, Cook Politico Report



# Public Sentiment: Generic Ballot

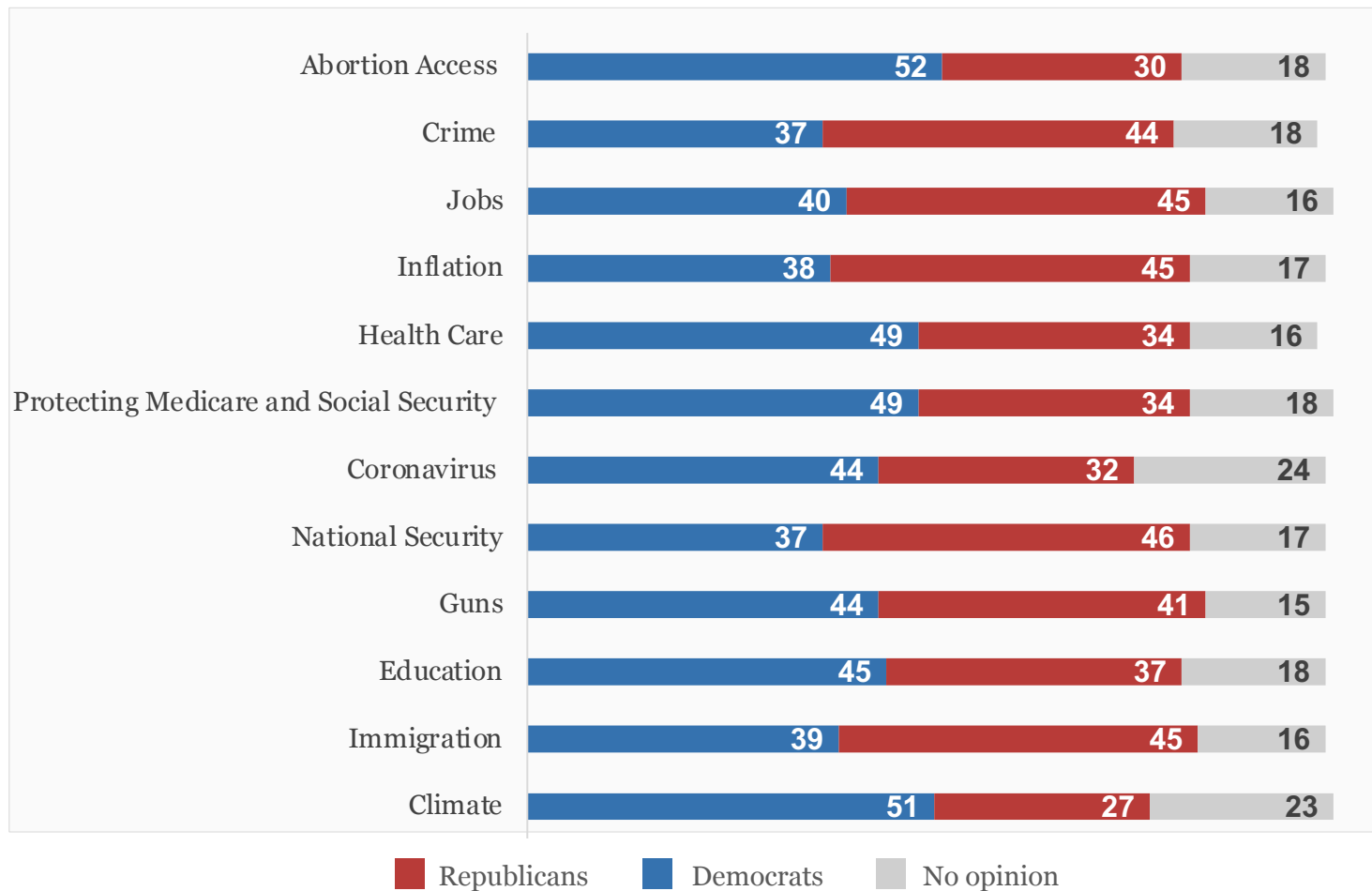
*Estimate based on polls that inquire which party voters would support in an election*





# Public Sentiment: Party Advantage on Key Issues

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



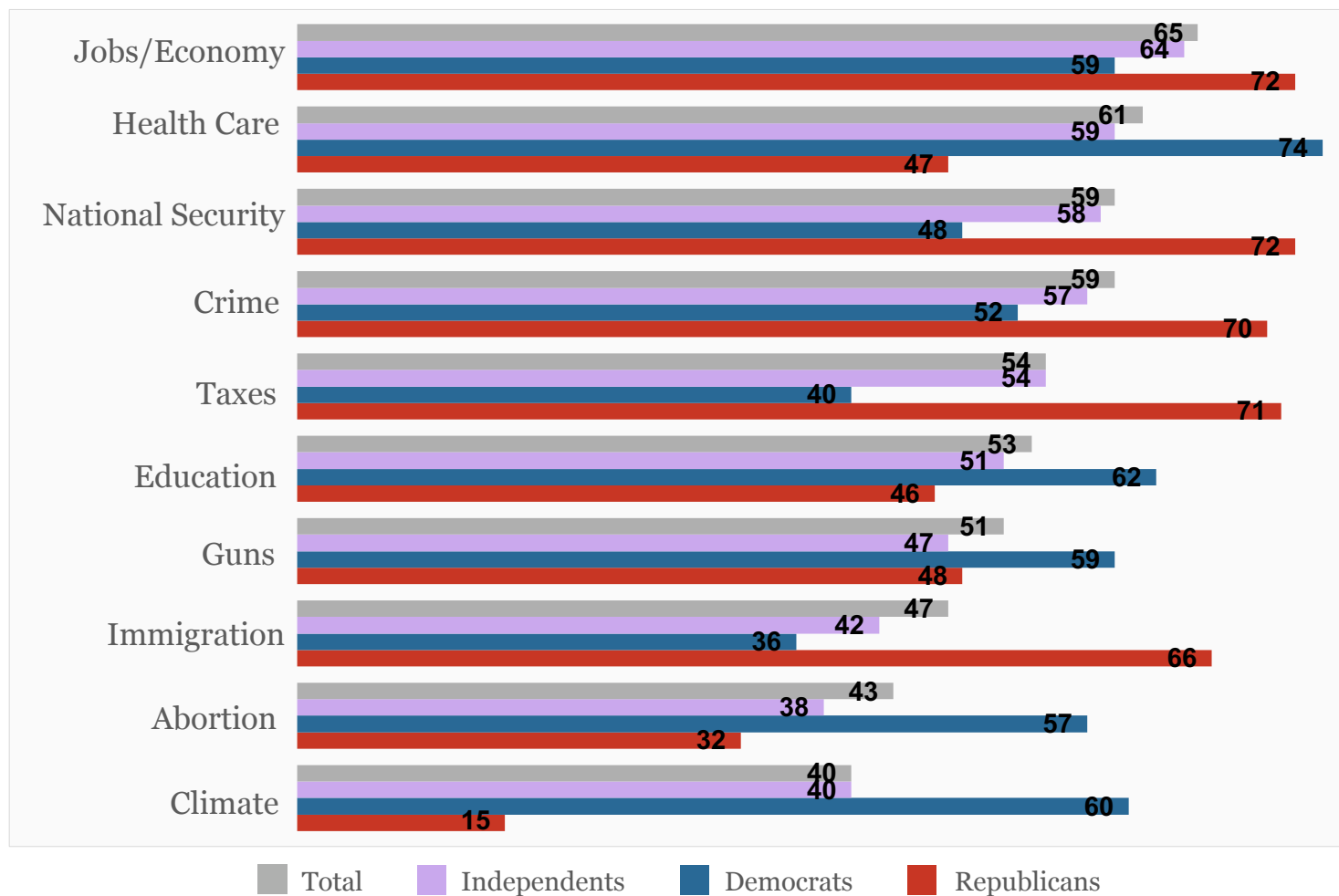
- Republicans hold an advantage with voters concerned about crime, jobs, inflation, immigration, and national security.
- Democrats hold an advantage with voters concerned about abortion access, health care, protecting Medicare and Social Security, Coronavirus, gun policy, education, and climate.

Source: Morning Consult-Politico poll of U.S. adults conducted 9/30 – 10/2/22



# 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 healthcare.
- Notably, following the climate surrounding abortion after the *Dobbs* decision, the issue increased importance among Democrats by 24 points since the June *Dobbs* decision; however, this week fell by 6 points among Democrats.
- For Republicans, jobs and the economy is the top issue, followed by national security.
- Wide partisan gaps remain on a number of issues, but a majority in both parties are concerned with jobs and the economy, and crime.

*Source: Economist/YouGov survey of U.S. adults conducted 10/17/2022*



# 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

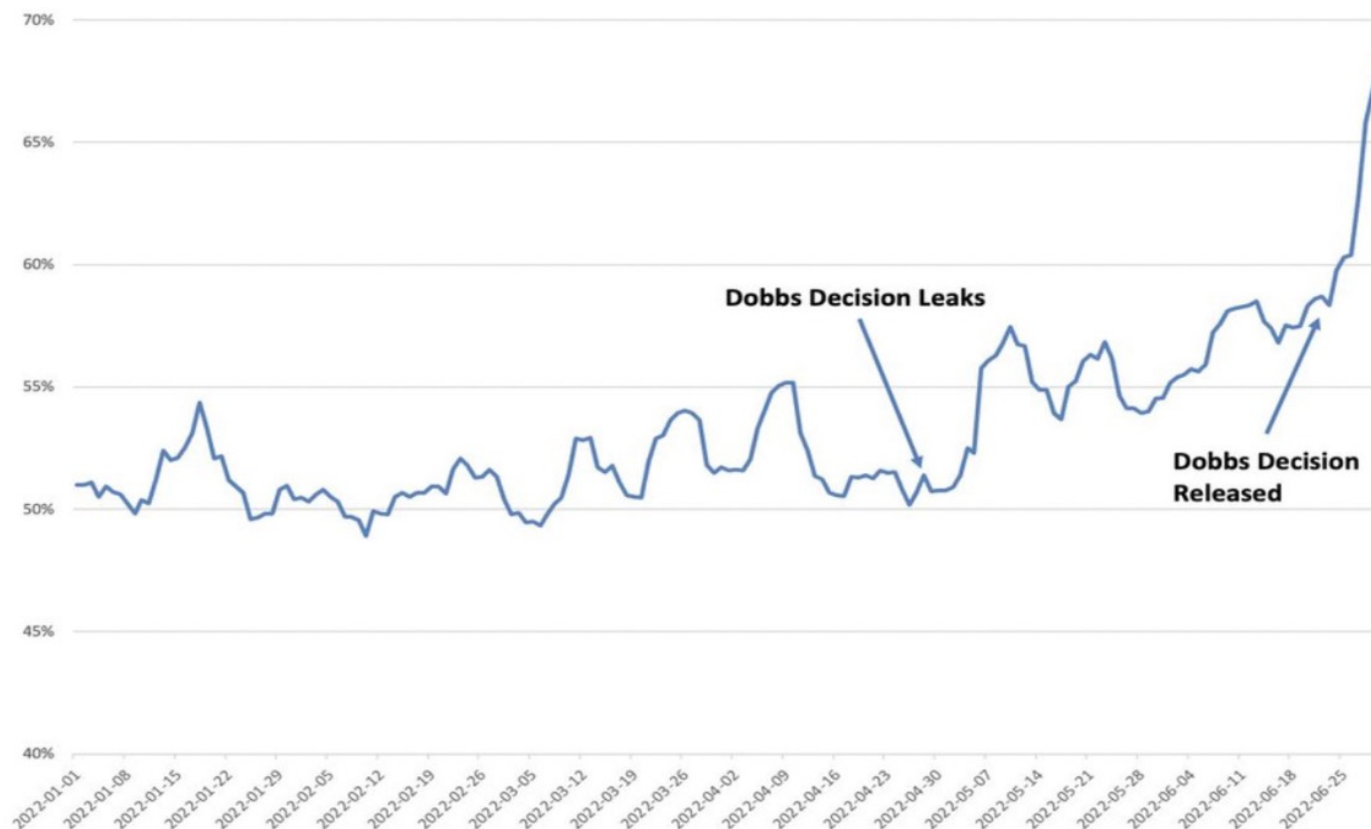
*\* Of those people, visiting Vote.Org website to register or verify their registration, 65% were women and almost half, 47%, were under the age of 35.*

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)



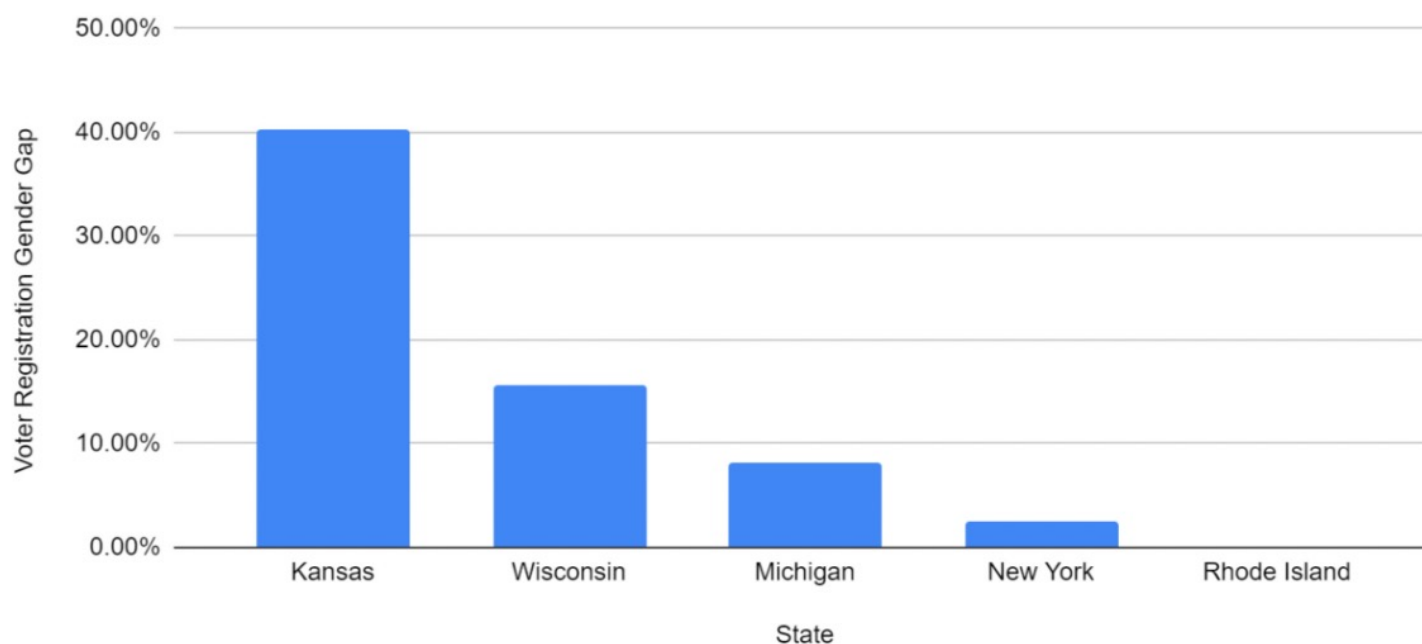
- Kansas voters turned out in a red state where Trump beat Biden 56.2% to 41.6% in 2020 and Republicans outnumber Democrats by almost 400,000 registered voters
- Among Kansans who registered to vote on or after June 24, the days following *Dobbs* decision, Democrats have had an 8-point advantage
- 70%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

Gender Gap Among New Registrants Since June 24



- 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?*

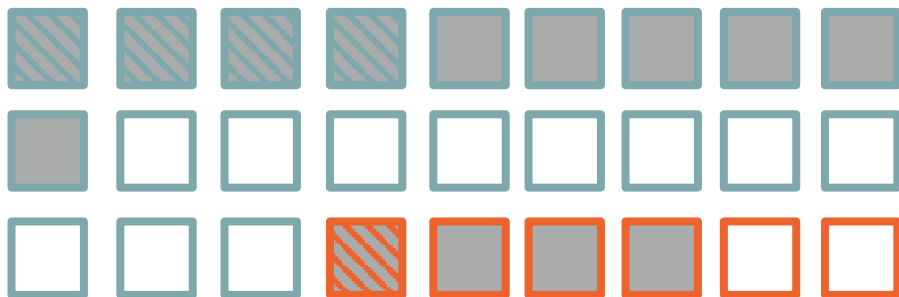
## Senate

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
June 7, 2022	California 22nd	R+11	R+24	R+14
June 14, 2022	Texas 34th*	D+5	R+5	R+10
	<b>Pre-Dobbs average</b>	<b>D+12</b>	<b>D+10</b>	<b>R+2</b>
June 28, 2022	Nebraska 1st	R+17	R+5	D+12
Aug. 9, 2022	Minnesota 1st	R+15	R+4	D+11
Aug. 16, 2022	Alaska at-large†	R+15	D+3	D+18
Aug. 23, 2022	New York 19th	R+4	D+2	D+6
Aug. 23, 2022	New York 23rd	R+15	R+7	D+9
	<b>Post-Dobbs average</b>	<b>R+13</b>	<b>R+2</b>	<b>D+11</b>

- Notably, since *Dobbs*, Democrats have done well in special elections.
- Other than Alaska, there have been four federal special elections since that June 24 decision, and Democrats did at least 6 points better than the partisan lean of the districts they ran in each election.

*Source: 9/1, Five Thirty Eight*

*\* 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: \*
  - **2 D:** GA (**Warnock**); NV (**Cortez Masto**)
  - **2 R:** WI (**Johnson**); PA (**Open**)
  - *Senate battleground states mirror battleground states of 2020 Presidential Election*
- Competitive: \*\*
  - **3 Lean D:** NH (**Hassan**); CO (**Bennet**); AZ (**Kelly**)
  - **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. Sharron Angle



### 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

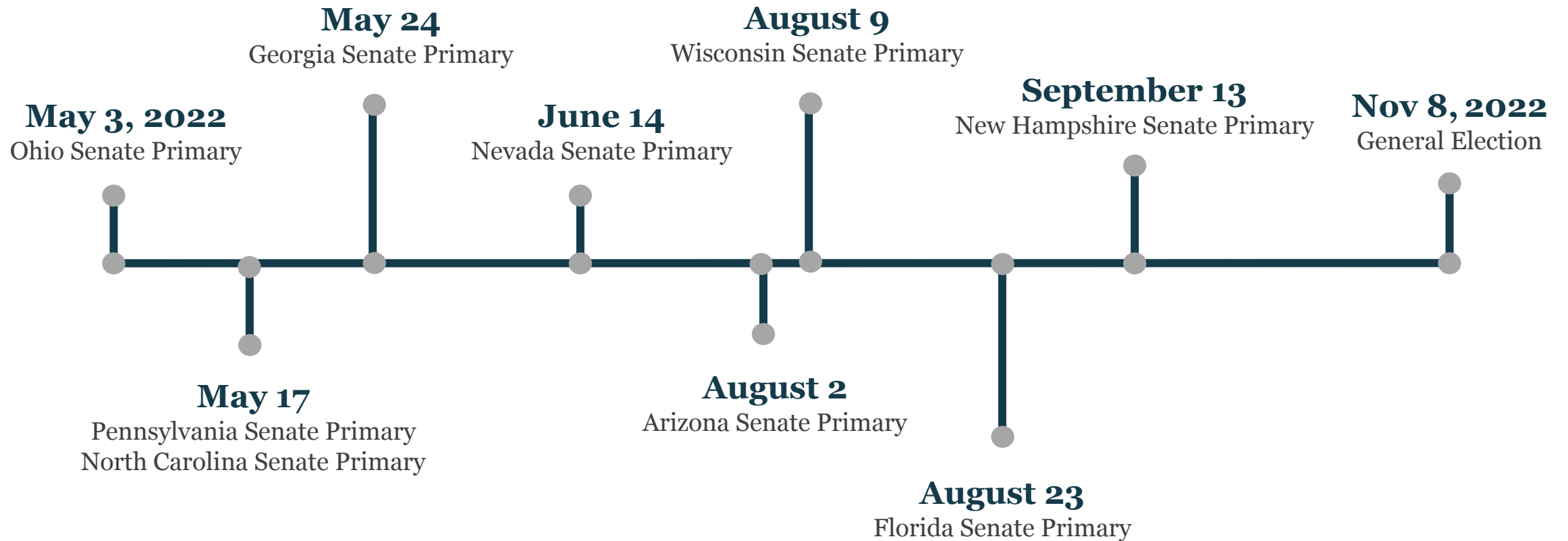
Raphael Warnock (Incumbent) vs. Herschel Walker

Source: Politico, 10/9/2009





## Primary Timeline: Most Competitive Senate Seats





## Latest Polls: Most Competitive Senate Seats



### Arizona Mark Kelly

Kelly + 3 (vs Masters)

As of 10/10

RCP Average: Kelly +4.5

As of 10/11



### Georgia Raphael Warnock

Warnock +2 (vs Walker)

As of 10/11

RCP Average: Warnock +3.3

As of 10/11



### Nevada Catherine Cortez Masto

Cortez Masto +2 (vs Laxalt)

As of 10/7

RCP Average: Laxalt +1.7

As of 10/7



### New Hampshire Maggie Hassan

Hassan +3 (vs Bolduc)

As of 9/30

RCP Average: Hassan +5.8

As of 10/6



### Wisconsin Ron Johnson

Johnson -1 (vs Barnes)

As of 10/11

RCP Average: Johnson +2.8

As of 10/9



### Pennsylvania Open

Fetterman +2 (vs Oz)

As of 10/11

RCP Average: Fetterman +3.4

As of 10/11



### Ohio Open

Ryan -1 (vs Vance)

As of 9/22

RCP Average: Vance + 0.8

As of 10/8



### North Carolina Open

Budd +1 (vs Beasley)

As of 10/8

RCP Average: Budd + 1.5

As of 10/2

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

Source: Based on most recent, highest rated, state-wide 538 polls &  
Real Clear Politics average spread



# Latest Party Spending: Most Competitive Senate Seats

~Total spending includes Party Super PACs, Committees, and Other Party Spending~

Republican party advantage in total spending= **R+\$55,903,345**

## Arizona

**Masters** v. **Kelly**

**Total Spending:**

\$46,455,538

**Party Advantage:**

**D+\$6,139,740**

## Georgia

**Walker** v. **Warnock**

**Total Spending:**

\$58,979,645

**Party Advantage:**

**R+\$2,623,496**

## Wisconsin

**Johnson** vs. **Barnes**

**Total Spending:**

\$48,789,167

**Party Advantage:**

**R+\$12,860,879**

## Nevada

**Laxalt** vs. **Cortez Masto**

**Total Spending:**

\$48,640,865

**Party Advantage:**

**D+\$2,998,236**

## New Hampshire

**Hassan** vs. **Bolduc**

**Total Spending:**

\$14,861,721

**Party Advantage:**

**R+\$4,100,614**

## Ohio

**Ryan** vs. **Vance**

**Total Spending:**

\$19,021,420

**Party Advantage:**

**R+\$8,903,596**

## Pennsylvania

**Fetterman** vs. **Oz**

**Total Spending:**

\$65,254,538

**Party Advantage:**

**R+\$11,686,026**

Source: 10/1, Lakshya Jain, Election Analyst

\*Total spending indicates spending from both parties

\*Party Advantage spending is the difference between the total Democratic and Republican Committees spending



# House

162

15

16

31

11

11

189

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

## Most Competitive

### 21 D Toss-Ups

(Open) CA -13  
(Peltola) – AK-AL  
(Open) IL-17  
(Mrvan) IN-1  
(Davids) KS-03  
(Golden) ME-2  
(Slotkin) MI-7  
(Craig) MN-2  
(Pappas) NH-1  
(Titus) NV-1  
(Lee) NV-3  
PA-07 (Wild)

NY-19 (Open)  
OH-13 (Open)  
OR-5 (Open)  
OR-06 (New Seat)  
PA-8 (Cartwright)  
PA-17 (Open)  
RI-02 (Open)  
VA-2 (Luria)  
WA-8 (Schrier)

### 10 R Toss-Ups

AZ-01 (Schweikert)  
CA-22 (Valadao)  
CA-27 (Garcia)  
CO-8 (New Seat)  
NC-13 (Open)  
NE-02 (Bacon)  
NM-2 (Herrell)  
NY-22 (Open)  
OH-1 (Chabot)  
TX-34 (Merged Seat)

## Competitive

### 17 Lean D

CA-47 (Porter)  
CA-49 (Levin)  
CT-05 (Hayes)  
IL-13 (Open)  
MI-03 (Open)  
MI-08 (Kildee)  
NC-1 (Open)  
NY-17 (Maloney)  
NY-18 (Ryan)  
OR-04 (Open)  
NY-3 (Open)  
NH-2 (Kuster)  
VA-7 (Spanberger)  
TX-28 (Cuellar)  
OH-9 (Kaptur)  
NC-1 (Open)  
NV-04 Horsford

### 11 Lean R

AZ-02 (O'Halleran)  
AZ-6 (Open)  
CA-41 (Calvert)  
CA-45 (Steel)  
FL-27 (Maria Elvira Salazar)  
IA-03 (Axne)  
NJ-7 (Malinowski)  
NY-1 (Open)  
TX-15 (Open)  
WI-3 (Open)  
WA-03 (Open)

*Cook Political Report, 9/1/22*

*\* Notably, PA-07 (Wild) moved from Lean R to D Toss up; TX-34 (Merged) moved from Lean D to R Toss up*





# Redistricting: Overview

## Net Change From Old Maps

**+ 6**

Democratic-leaning seats

**0**

Republican-leaning seats

**– 6**

Highly competitive seats

## States Remaining

Louisiana

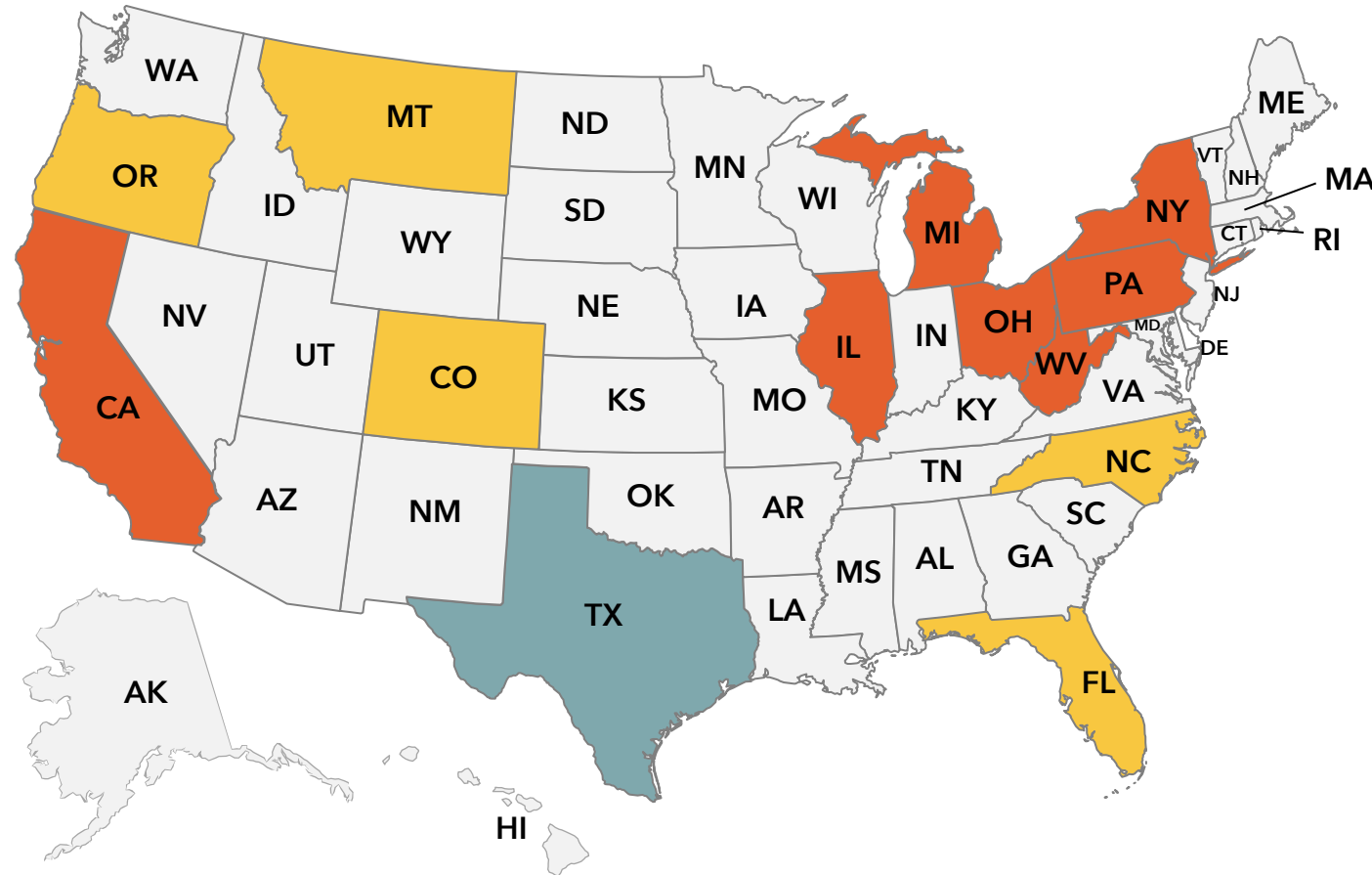
## States with Litigation Still Pending

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

Source: 7/19/22, FiveThirtyEight



# Redistricting: Outcomes



■ +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



# Gubernatorial Elections

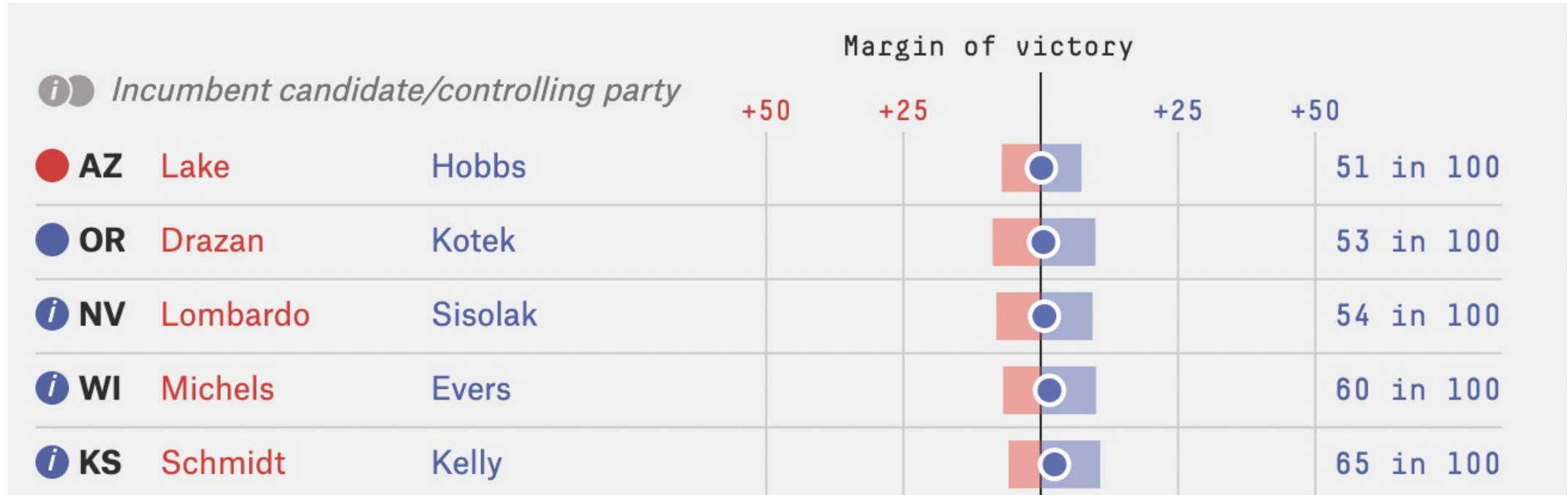
- **Current Landscape:** There are **23** Democratic governors and **27** Republican governors
- **2022:** Gubernatorial elections will be held in **36** states
  - Democrats are defending **16** seats (includes **3** open seats)
  - Republicans are defending **20** seats (includes **5** open seats)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

Sources: FiveThirtyEight, Cook Political Report

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



# 5 Most Competitive Governorship Races in 2022

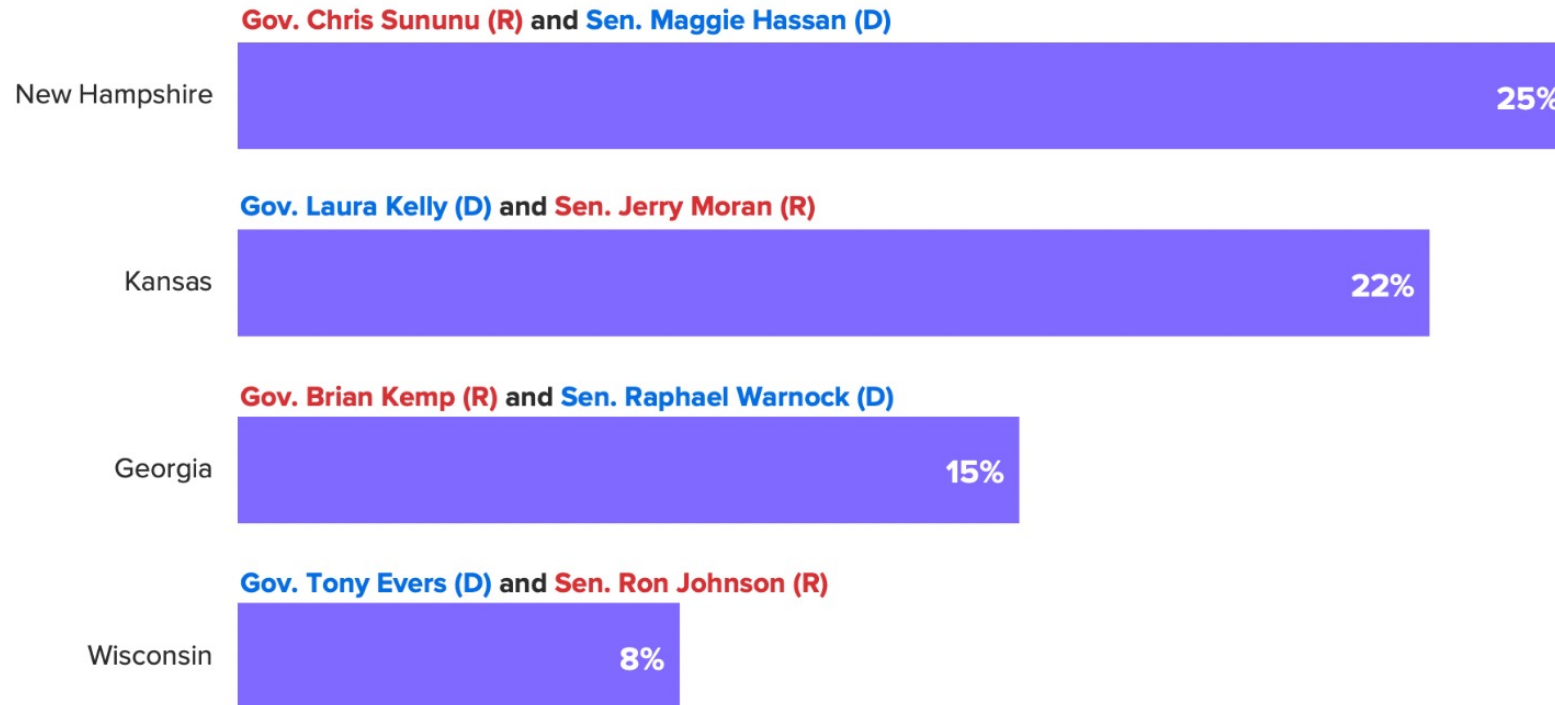


Source: FiveThirtyEight

\*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.



# Potential for Crossover Support: Share of Voters by State Who Approve of Both Officials on November Ballot



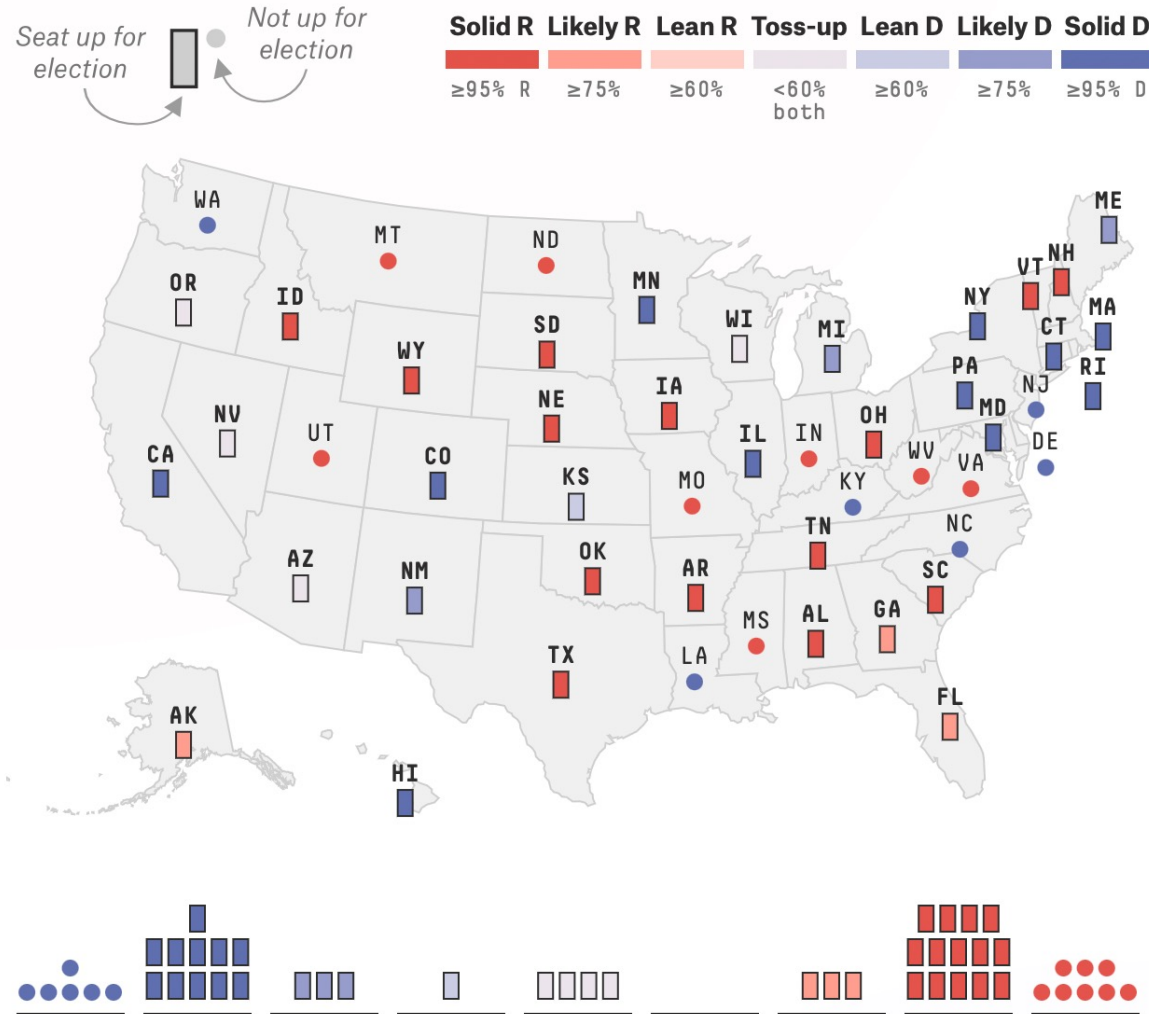
- The chart represents the share of voters in each state who approve of both of the following officials appearing on the same ballot in November.
- Hassan and Warnock face voters next month on ballots that will feature a governor of the opposite political party.
- The quarterly data suggests ticket splitting — where voters pick Republican and Democratic candidates on the same ballot — could factor into these races.

Source: 10/13/2022, Morning Consult





# 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: 10/17/22, FiveThirtyEight