

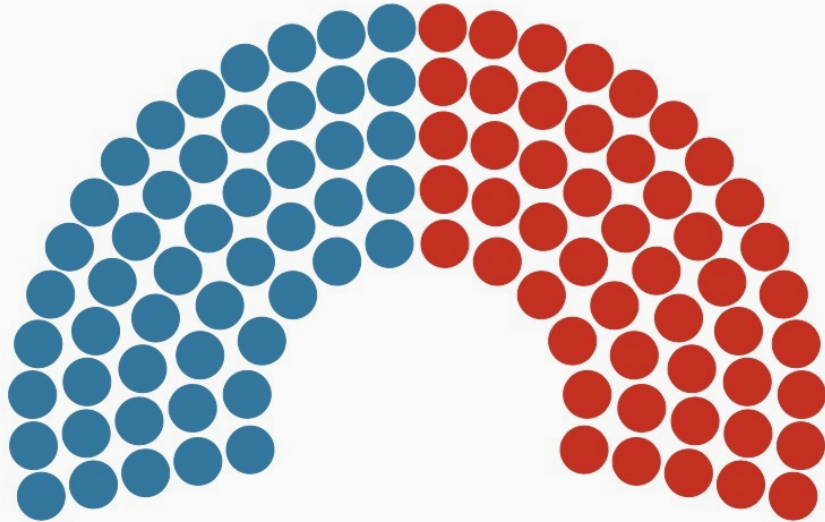


2022 Midterm Outlook

October 4, 2022
– 35 Days Until Election Day –



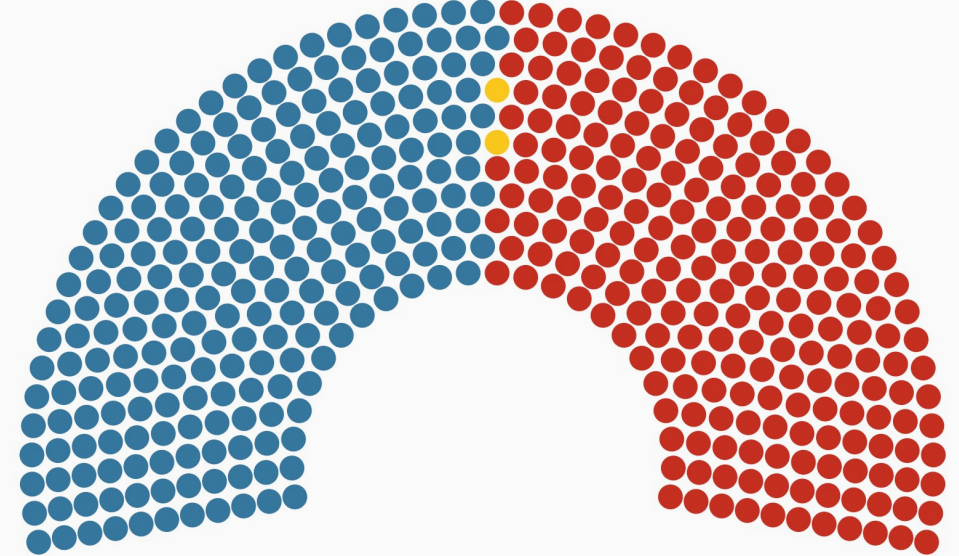
What's at Stake: Current Balance of Power



U.S. Senate
50 Ds – 50 Rs

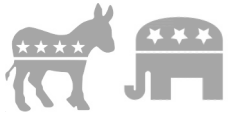
(Includes 2 independents who participate in the Democratic caucus; VP Harris serves as tiebreaking 51st vote)

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



House of Representatives
221 Ds – 212 Rs

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

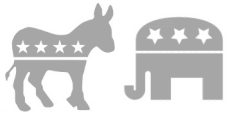


What's at Stake: Overview

- 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*

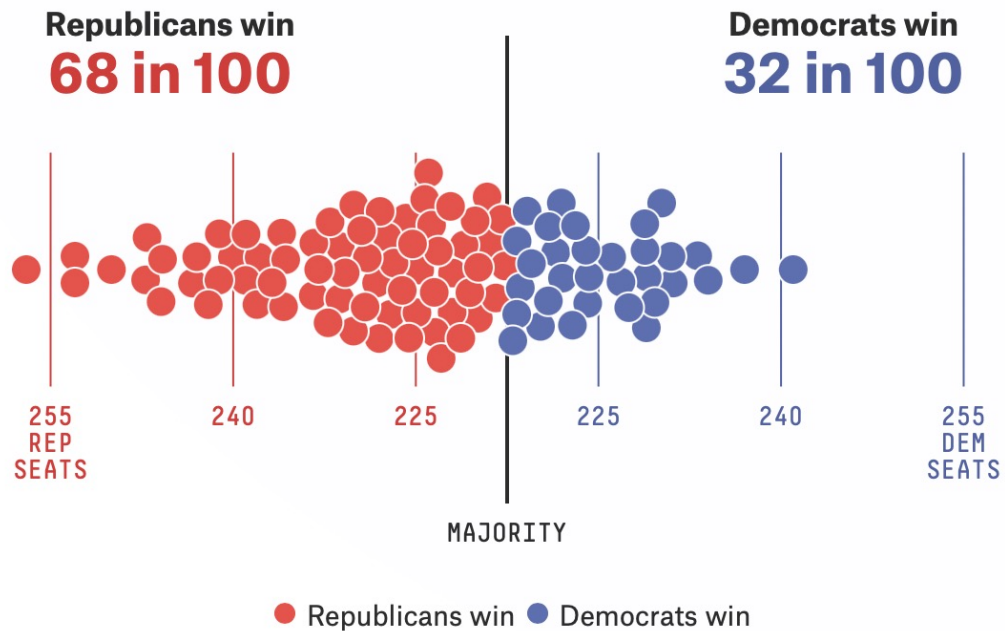
*** Includes special election to finish Sen. Inhofe's (R-OK) term*



Congress Prediction: Republican Control of House vs. Senate

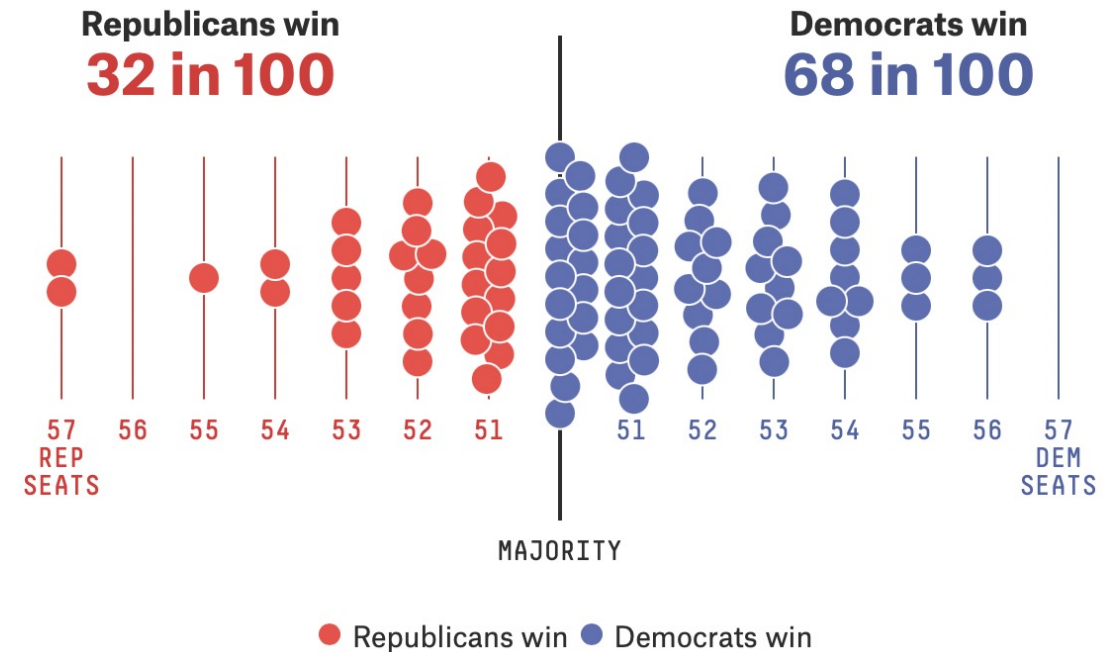
House: Republicans slightly *avored* to win

Republicans have a 68% chance of taking over the House

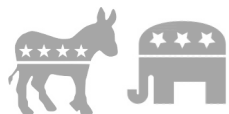


Senate: Democrats slightly *avored* to win

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



Source 9/30/22, FiveThirtyEight
*Data from Deluxe model stimulates the election 40,000 times to see who wins most

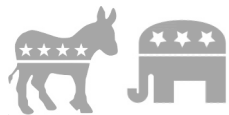


What's at Stake: Overview

- 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***

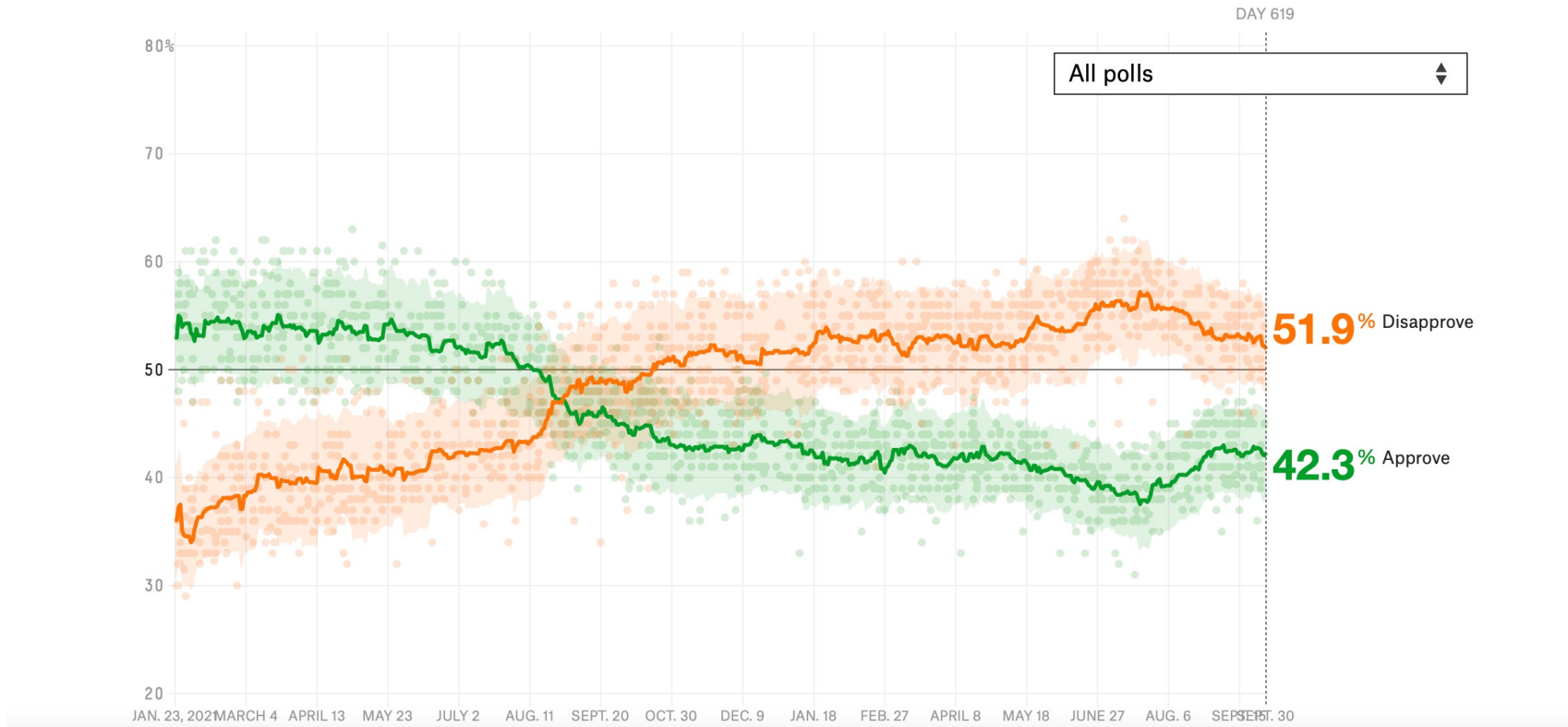
“I’m not focusing on [whether Biden should or should not run], if we get a couple more seats in the Senate — right now, if the election were held today, we would pick up a few seats. We’re doing great. And you have many listeners in ... Pennsylvania, in Wisconsin, in North Carolina, in Ohio. Those states 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
9/30/2022 (FiveThirtyEight)

How Do Other Presidents' Approval Ratings Compare?*



40% 9/15/2018



46% 9/12/2010



67% 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

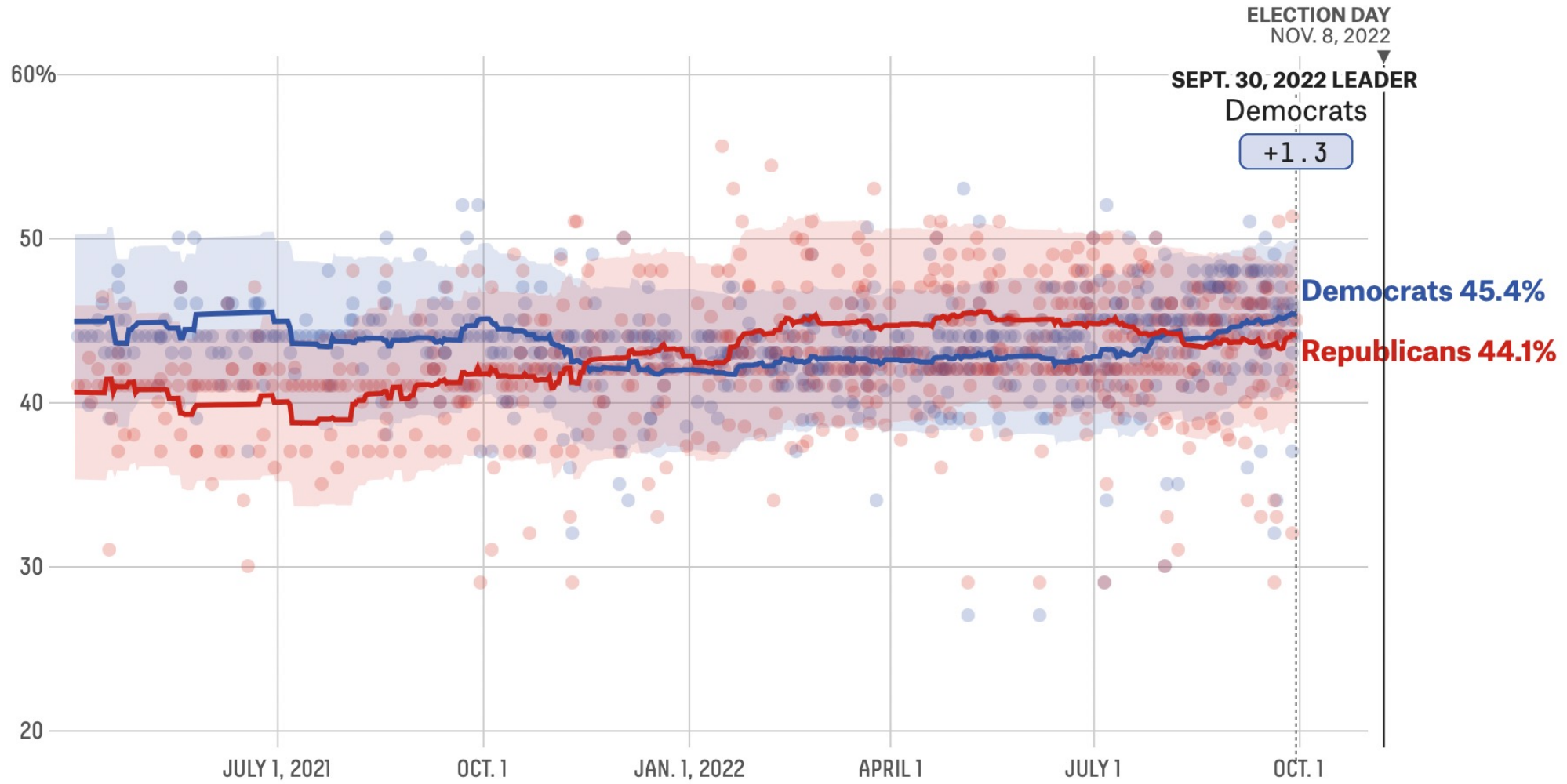
- In the last five midterm elections for which Pew had data, "somewhat disapprovers" of the sitting president have never been this supportive of his party in the upcoming election.
- Among the voters who say they "somewhat disapprove" of Biden, 43 percent say they are planning to vote Democratic this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

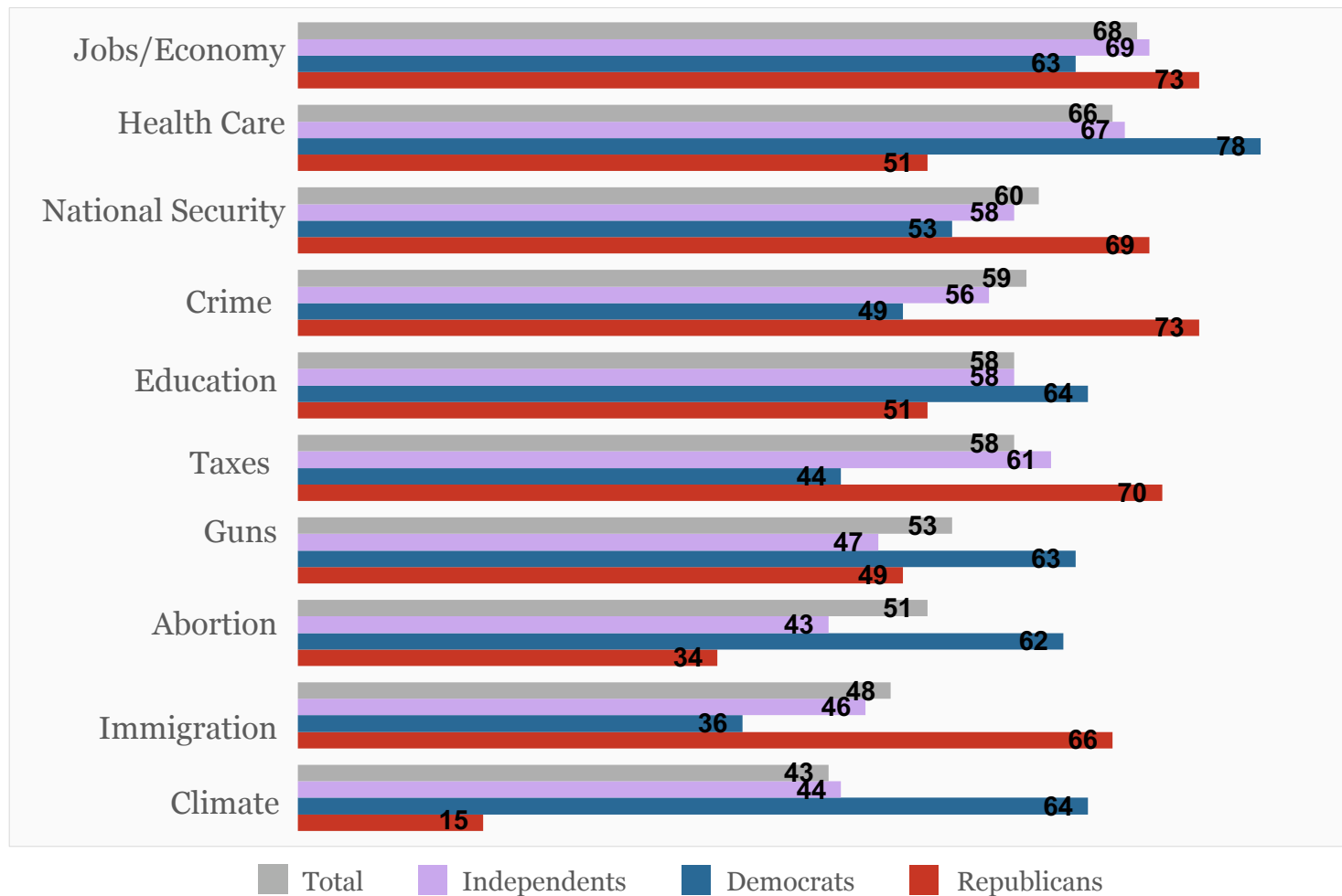
Estimate based on polls that inquire which party voters would support in an election





Public Sentiment: Key Issues for Voters

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



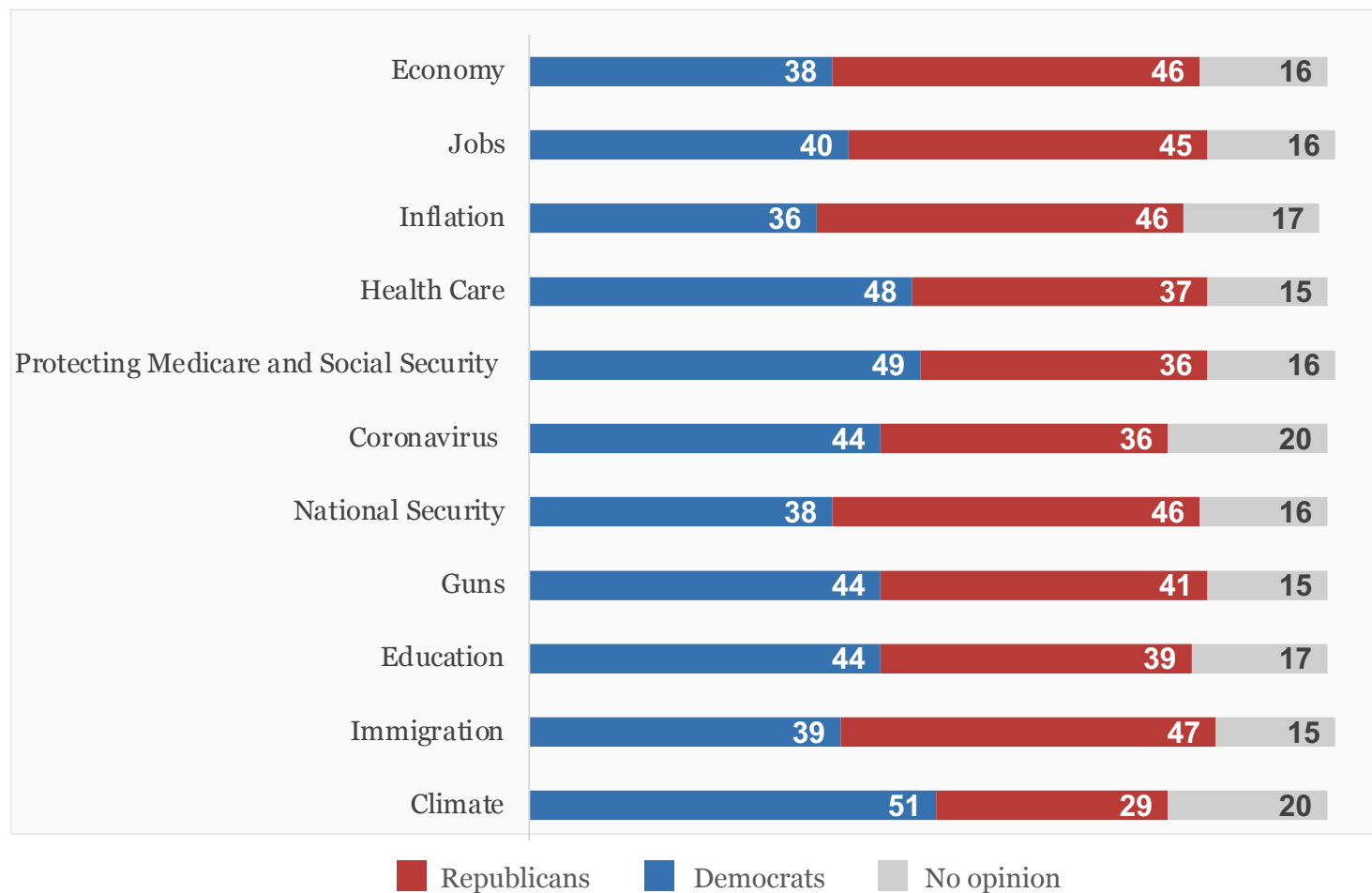
- Jobs/Economy are the public’s top concern, followed by healthcare.
- Notably, following the climate surrounding abortion after the *Dobbs* decision, the issue increased importance among Democrats by 23 points since the June *Dobbs* decision.
- For Republicans, jobs/economy and crime are the top issue areas, followed by national security and taxes.
- Wide partisan gaps remain on a number of issues, but a majority in both parties are concerned with jobs and the economy, healthcare, national security, education, and gun policy.

Source: Economist/YouGov survey of U.S. adults conducted 9/30/2022



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 9/16 – 9/18/22*

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

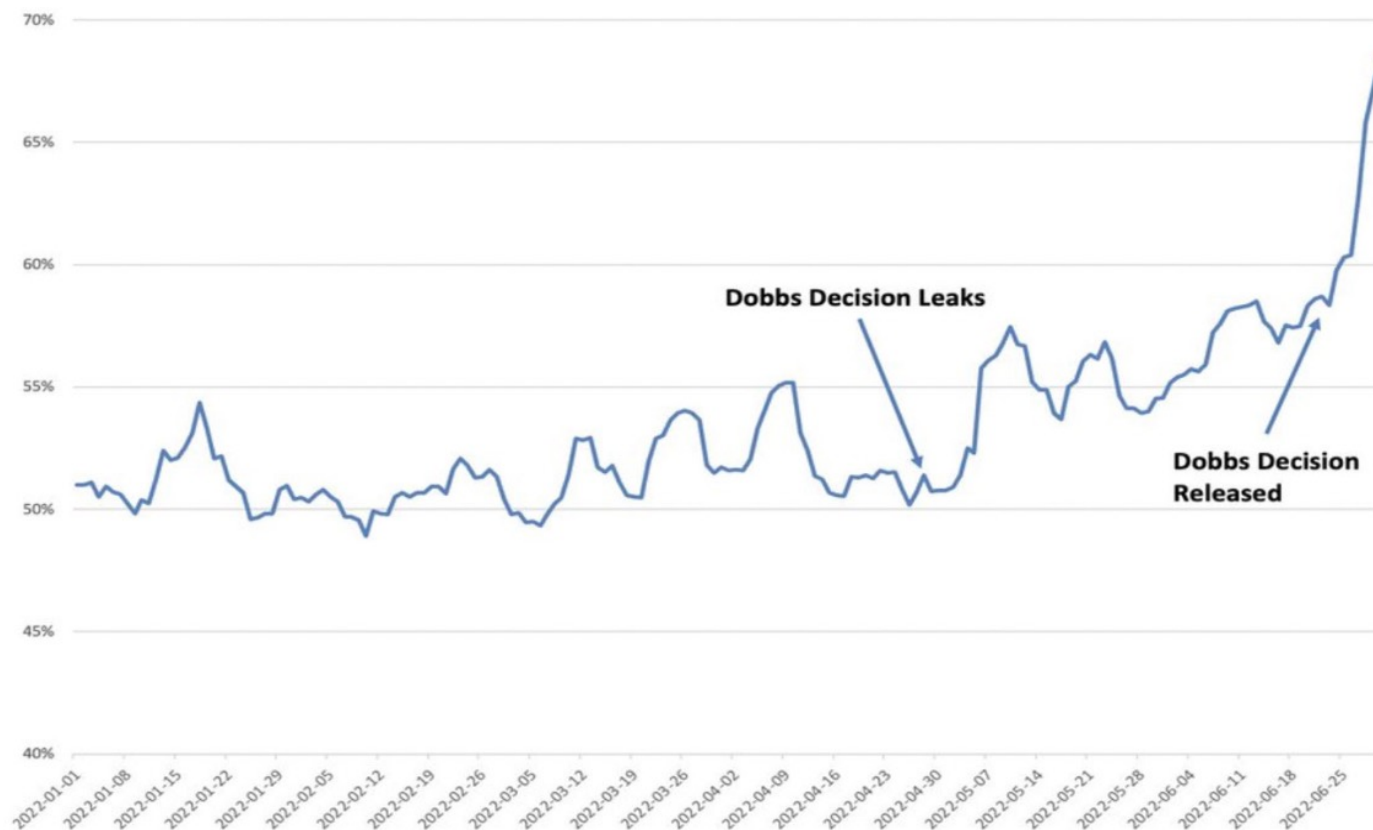
** Of those people, visiting Vote.Org website to register or verify their registration, 65% were women and almost half, 47%, were under the age of 35.*

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)

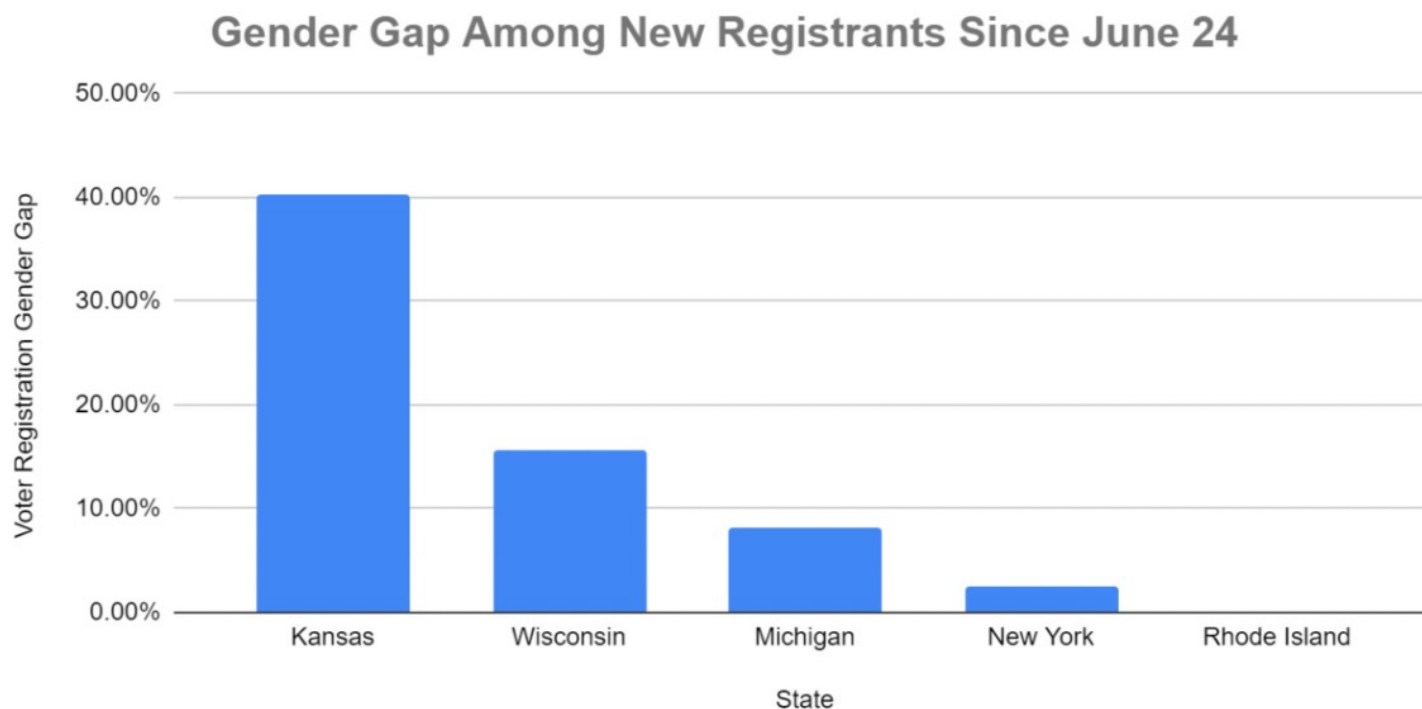


- Kansas voters turned out in a red state where Trump beat Biden 56.2% to 41.6% in 2020 and Republicans outnumber Democrats by almost 400,000 registered voters
- Among Kansans who registered to vote on or after June 24, the days following *Dobbs* decision, Democrats have had an 8-point advantage
- 70%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

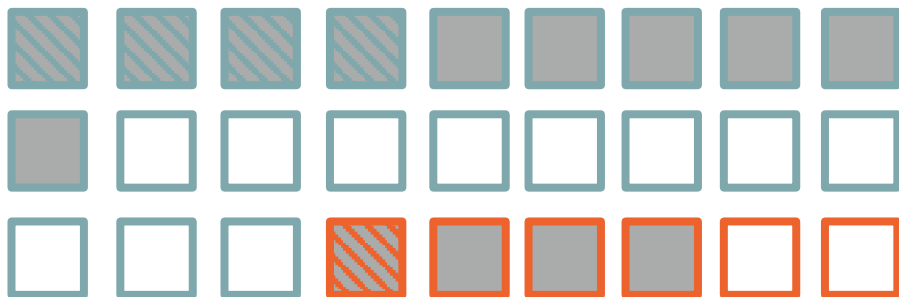
Senate

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
June 7, 2022	California 22nd	R+11	R+24	R+14
June 14, 2022	Texas 34th*	D+5	R+5	R+10
	Pre-Dobbs average	D+12	D+10	R+2
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
	Post-Dobbs average	R+13	R+2	D+11

- 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**)
 - **1 R:** WI (**Johnson**)
 - *Senate battleground states mirror battleground states of 2020 Presidential Election*
- Competitive: **
 - **4 Lean D:** NH (**Hassan**); CO (**Bennet**); PA (**Open**); 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

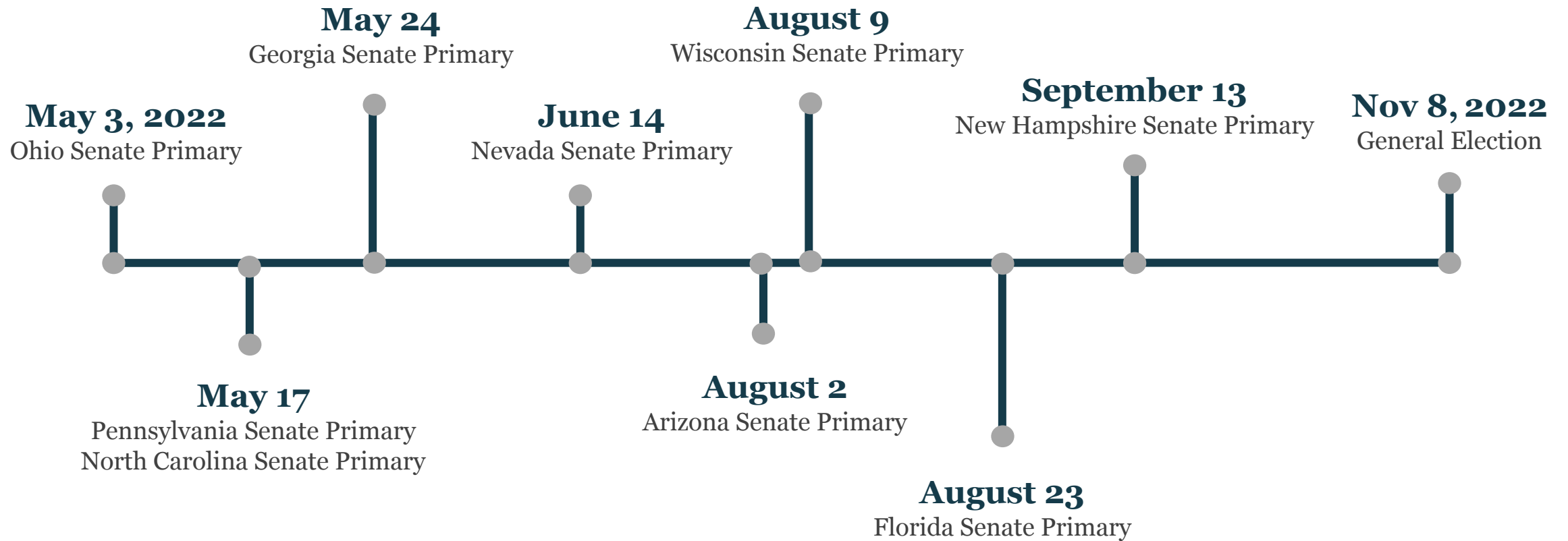
Georgia

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 + 6 (vs Masters)

As of 9/26

RCP Average: Kelly +5.4

As of 9/26



Georgia Raphael Warnock

Warnock +5 (vs Walker)

As of 9/26

RCP Average: Walker +0.7

As of 9/26



Nevada Catherine Cortez Masto

Cortez Masto -3 (vs Laxalt)

As of 9/20

RCP Average: Laxalt +1.7

As of 9/20



New Hampshire Maggie Hassan

Hassan +8 (vs Bolduc)

As of 9/19

RCP Average: Hassan +9.3

As of 9/26



Wisconsin Ron Johnson

Johnson EVEN (vs Barnes)

As of 9/18

RCP Average: Johnson +2.3

As of 9/26



Pennsylvania Open

Fetterman +2 (vs Oz)

As of 9/26

RCP Average: Fetterman +4.1

As of 9/26



Ohio Open

Ryan +3 (vs Vance)

As of 9/22

RCP Average: Vance + 1.2

As of 9/22

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

11 14

34

11 15

188

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

Most Competitive

22 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
(Titus) NV-1
(Lee) NV-3
(Horsford) NV-4

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

9 R Toss-Ups

AZ-01 (Schweikert)
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

18 Lean D

CA-09 (Harder)
CA-47 (Porter)
CA-49 (Levin)
CT-05 (Hayes)
IL-6 (Casten)
IL-13 (Open)
MI-03 (Open)
NC-1 (Open)
NY-17 (Maloney)
NY-18 (Ryan)
TX-34 (Merged)
OR-04 (Open)
OR-06 (New Seat)
NY-3 (Open)
NH-2 (Kuster)
VA-7 (Spanberger)
TX-28 (Cuellar)
OH-9 (Kaptur)

11 Lean R

AZ-02 (O'Halleran)
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

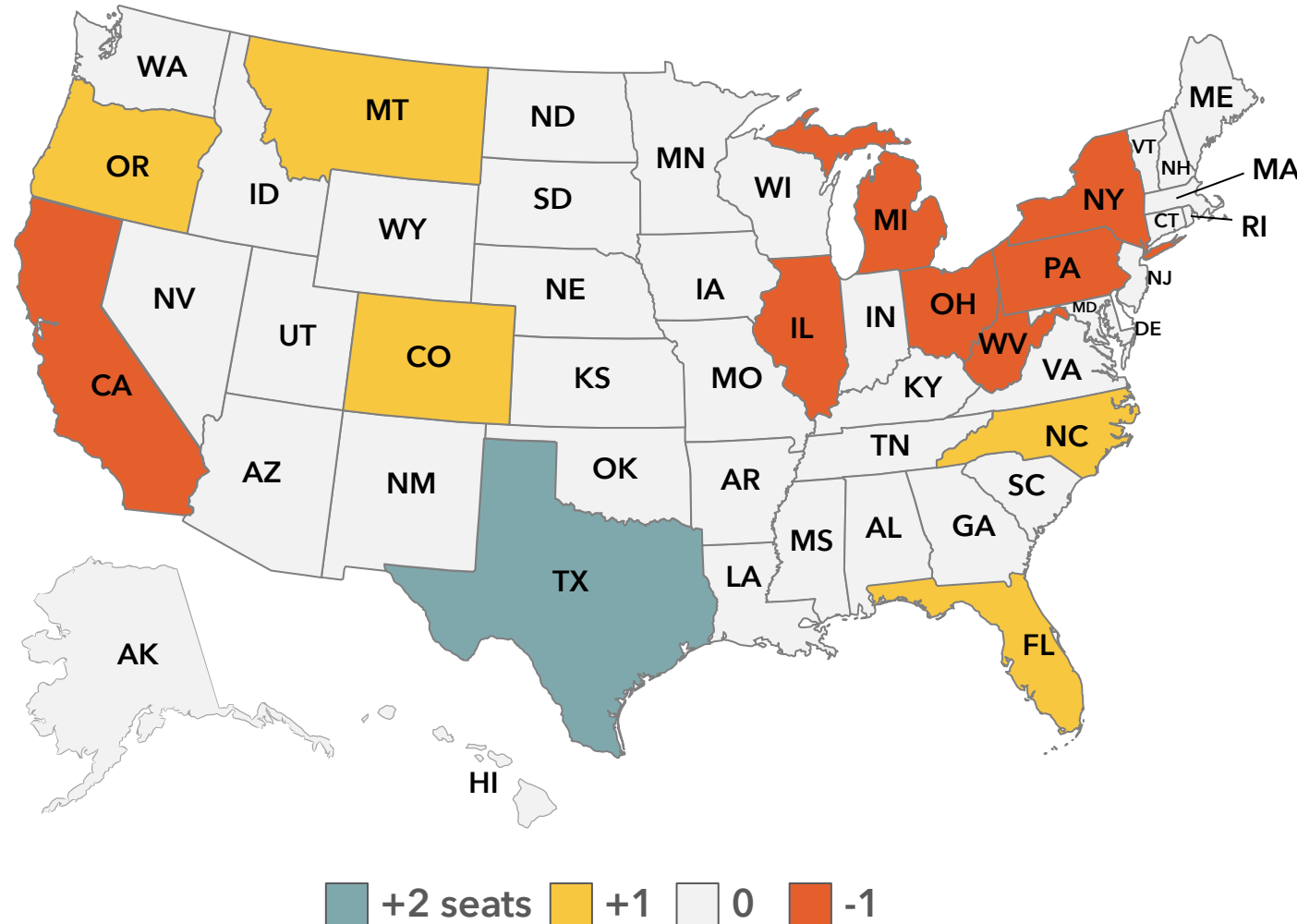
States with Litigation Still Pending

- 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/lost primary **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)	<u>Kevin Brady (TX)</u>

Strikethrough: Retiring members/lost primary **Bold:** Member lost election in 2022 **Underline:** term-limited

Source: Bloomberg Government



Gubernatorial Elections

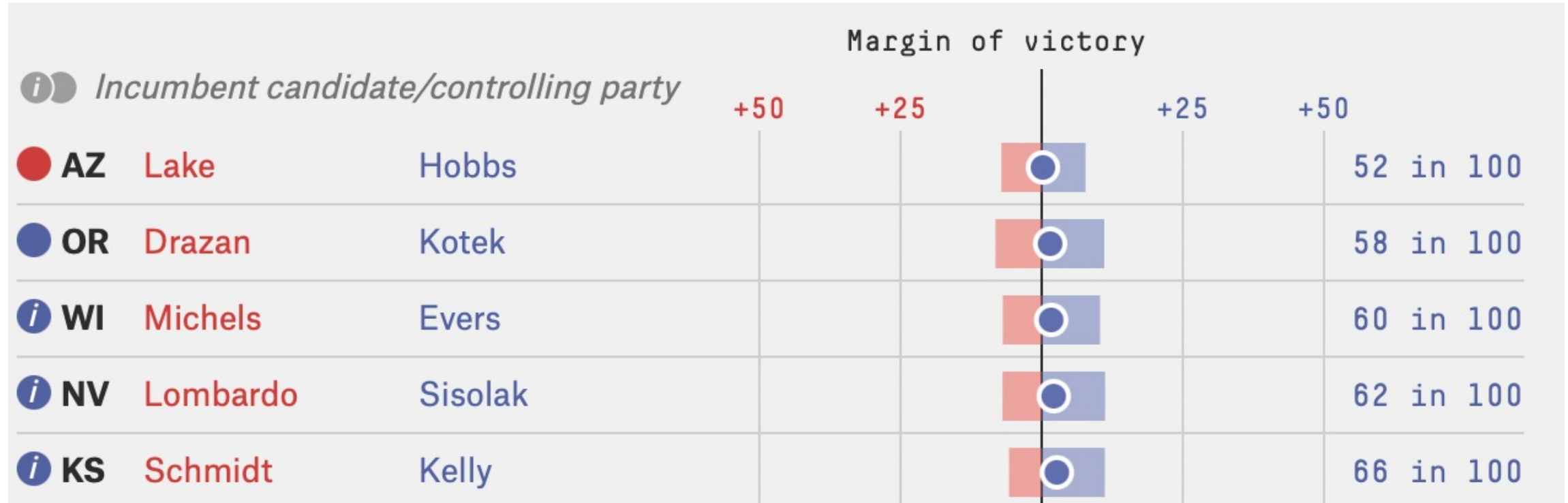
- **Current Landscape:** There are **23** Democratic governors and **27** Republican governors
- **2022:** Gubernatorial elections will be held in **36** states
 - Democrats are defending **16** seats (includes **3** open seats)
 - Republicans are defending **20** seats (includes **5** open seats)
- There are **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

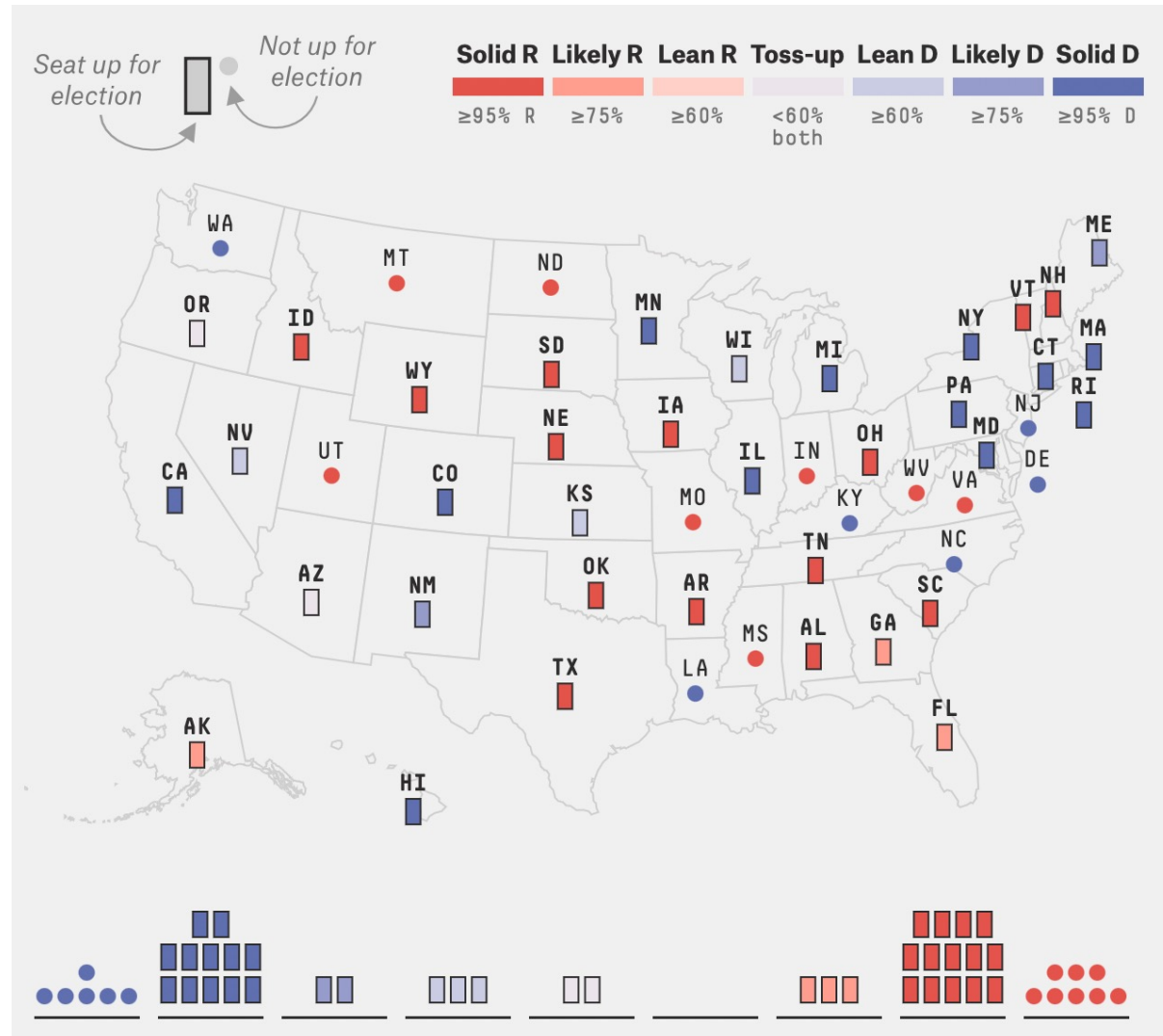


Source: FiveThirtyEight

*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.



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