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# *Midterm Election Recap*

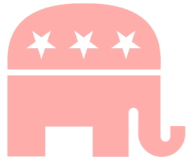
*Based on data as of 9am November 15.*

*Exit polling and race results are preliminary and will  
change once final counts are in.*



# *Control of Congress is too close to call, but divided government is likely.*

## House



*Likely Republican*

## **House will likely be GOP-controlled, Democrats will keep the Senate**

- Analysts predict a Republican majority of ~3 seats (216 D, 219 R).
- The Senate currently stands at 50 Democrats, 49 Republicans.
- Georgia will go to a December 6<sup>th</sup> runoff.

## **Another high-turnout midterm**

- Nearly on-par with record 2018 turnout when Democrats won 41 House seats.
- This could be the new normal.

## Senate



*Remains Democratic*

## **Democrats beat expectations (and history)**

- Obama and Trump (who had similar approval levels) each lost 40 seats in their first midterms.
- Best performance by a first-term incumbent president in 20 years.

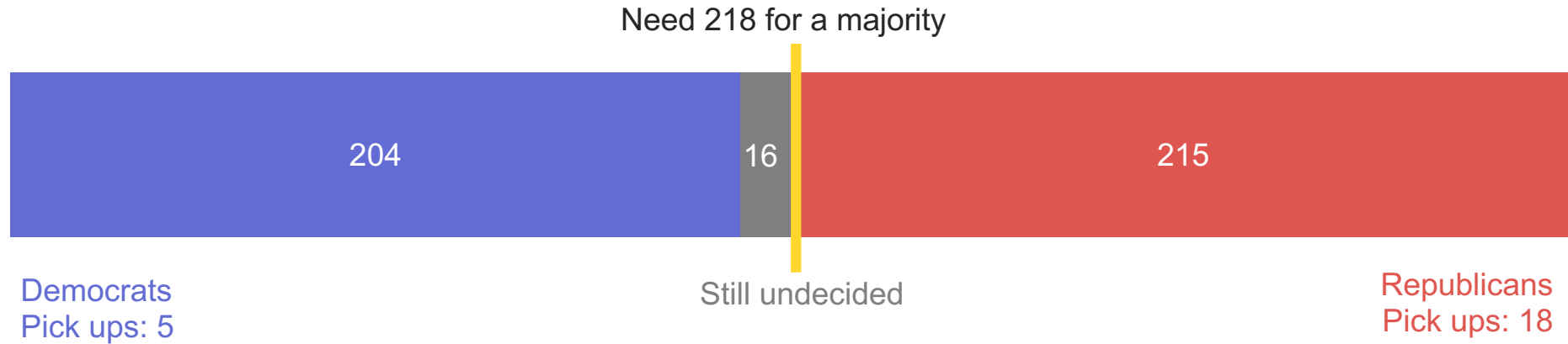
## **Abortion mattered more than forecasted**

- Inflation wasn't the only issue on voters' minds. Abortion came in as a close second.
- Abortion rights won in every state where it was on the ballot – even where Republicans won statewide.

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# *The Latest Results*

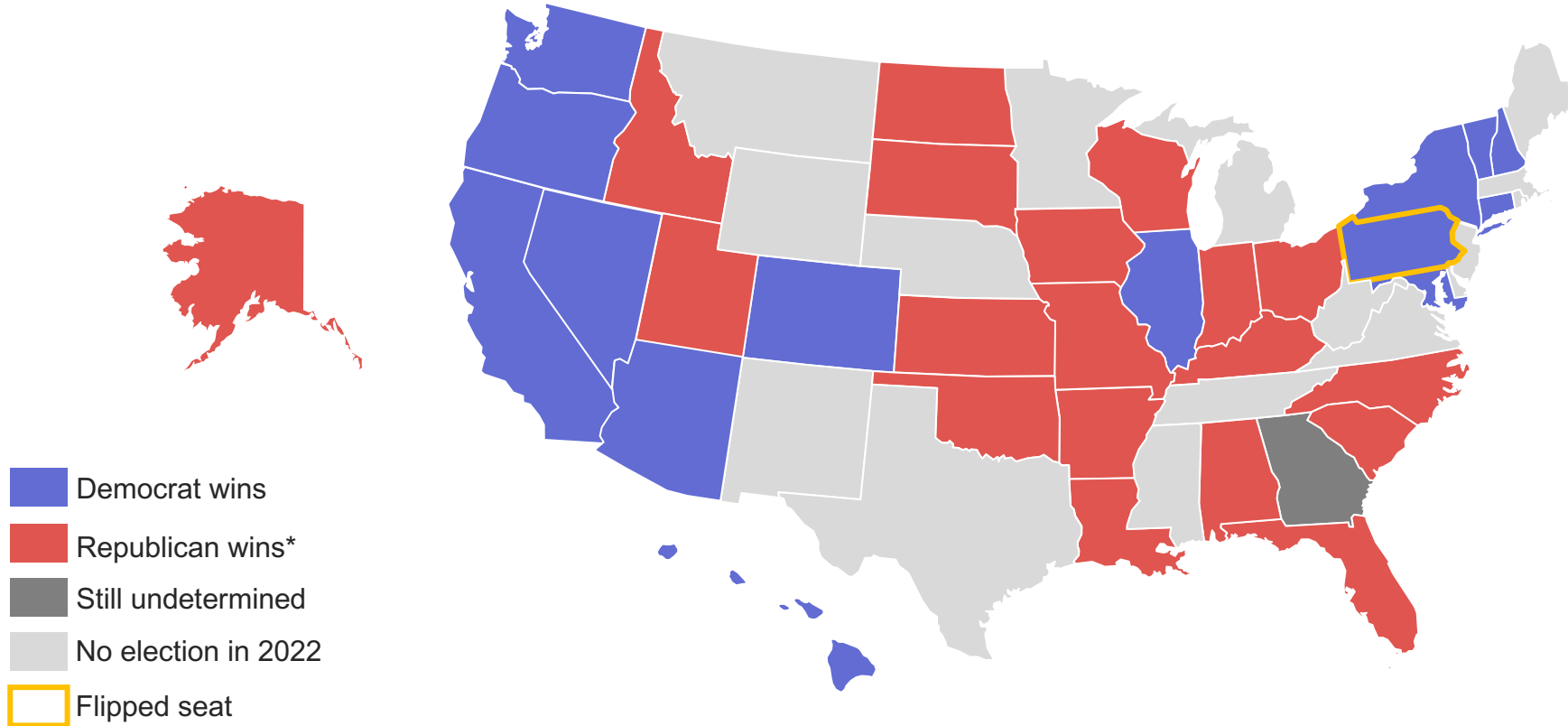
# Republicans are likely to win control of the House by a narrow margin.



## ***Republican gains fell well below expectations***

- Obama and Trump lost **over 40 seats** in their first year midterms, with approval numbers similar to Biden's.
- The modern-day average seat loss for a President's party is **28**. Democrats stand to lose much less.

# Democrats will keep control of the Senate, even as Georgia goes to a runoff.



- Democrats flipped 1 seat in PA (John Fetterman)
- Georgia will go to a runoff election on Dec 6th.
- Georgia will remain the battleground for the next few weeks.

\*Alaska = expected GOP win

Republicans need to net: 1 seats  
Republicans so far have netted: 0 seats  
**Still outstanding: 3 seats**

## *Georgia will have a runoff election in December.*

**No candidate will receive 50% of the vote.  
Runoff scheduled on December 6th.**

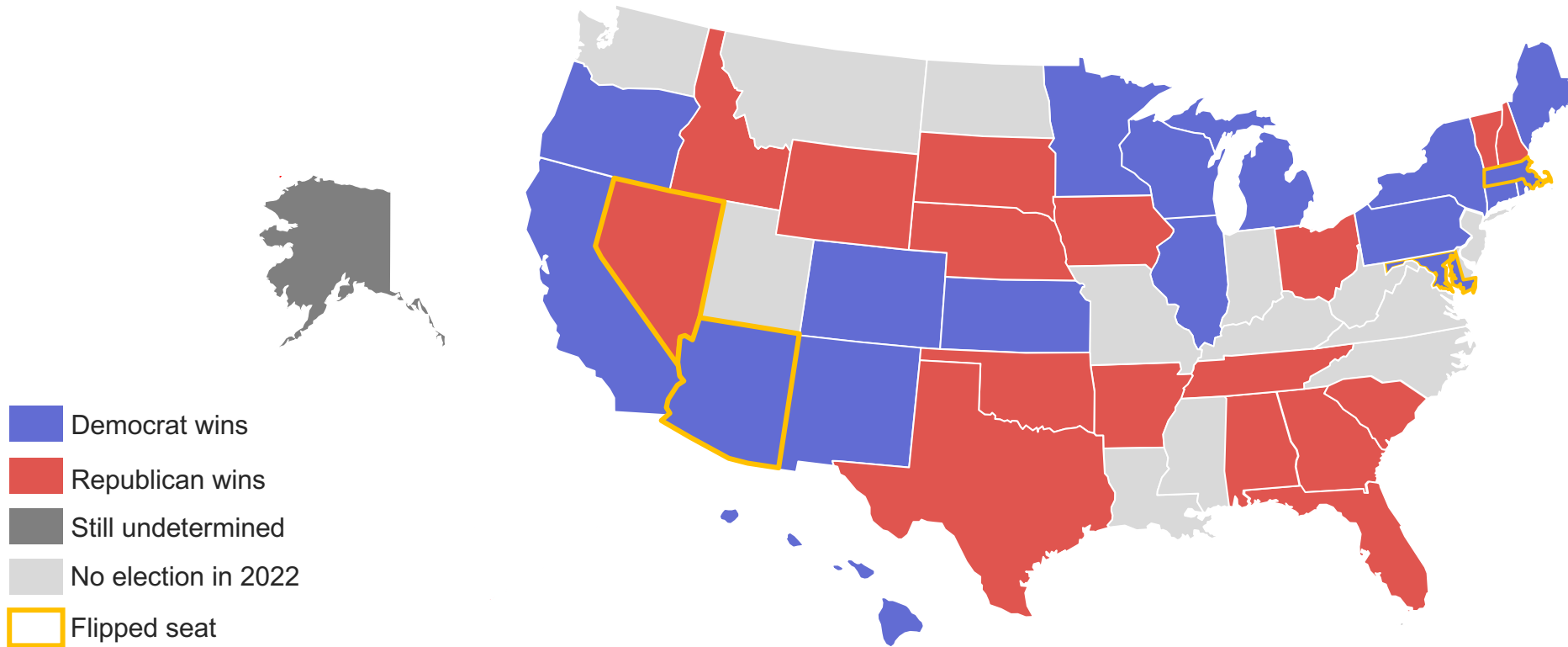


General Election  
**Warnock 49.4%**  
**Walker 48.5%**  
99% reporting

Run-off Rating: Toss Up

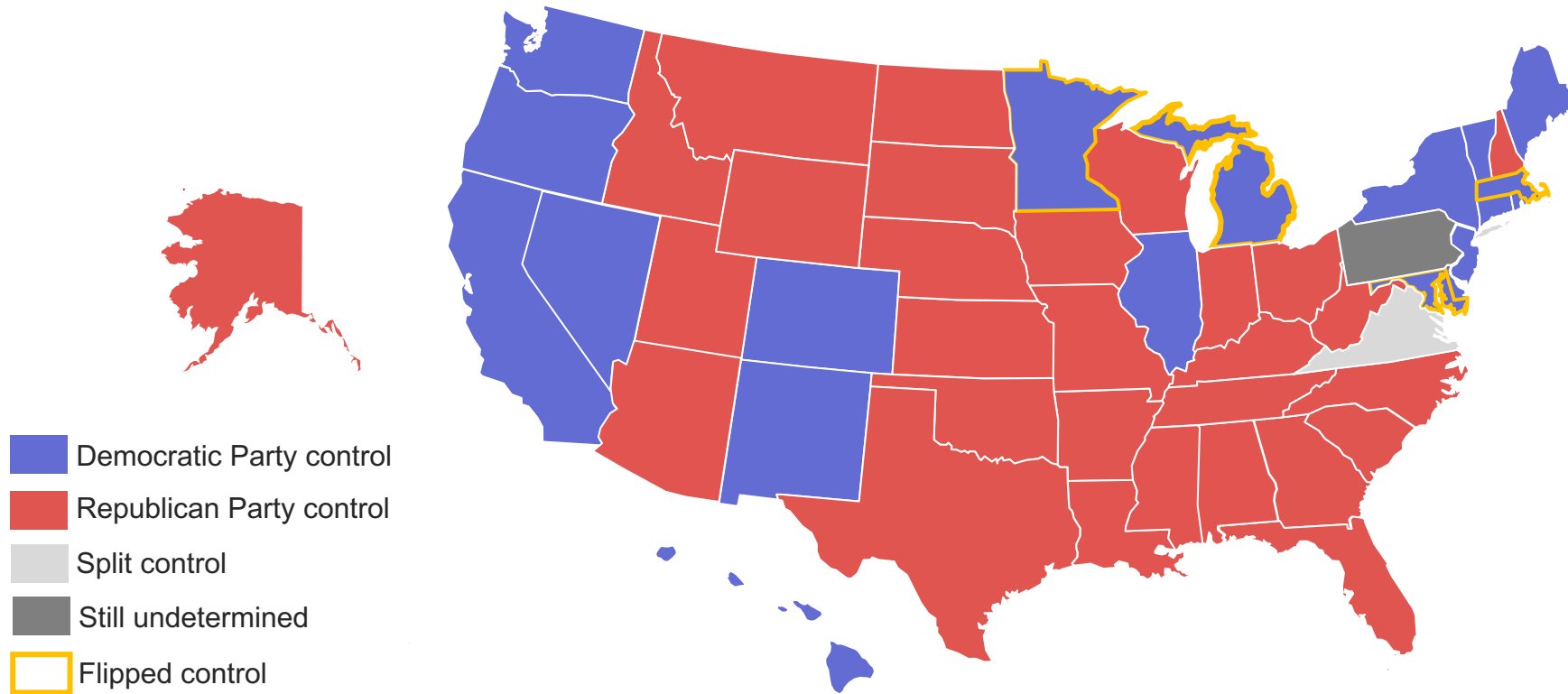
- Given the smaller early voting window and voter fatigue, **expect a lower turnout for the December runoff.** Analysts predict that this would hurt Warnock.
- However, Republican voters who are less enthusiastic about Walker may decide to stay home now that they know the **Senate will remain in Democrats' control regardless.**
- This will be Georgia's third runoff in two years.

# Democrats picked up three gubernatorial seats and Republicans picked up one.



- Democrats flipped three seats in Arizona (Katie Hobbs), Massachusetts (Maura Healy), and Maryland (Wes Moore).
- Republicans flipped one seat in Nevada (Joe Lombardo).
- Ballots are still being counted in Alaska and Arizona.
- Record number of women governors in 2023 (12 total).

# Republicans will still have the advantage in more statehouses.



- Republicans will hold the House and Senate in 29 states (24 trifectas)
- Democrats will hold House and Senate in 19 states (14 trifectas)
- NC and WI narrowly missed on veto-proof Republican majorities
- VT gained a veto-proof Democratic supermajority
- Democrats flipped control of both chambers in MI

### Secretaries of State:

- 27 states had Sec. of State elections this year
- 13 states had 2020 election deniers on the ballot:
  - 3 won (AL, IN, WY)
  - 10 lost, including all candidates in races that were competitive (AZ, CT, MA, MI, MN, ND, NM, NV, OH, VT)



# 2022 saw many key firsts.

## A sample of notable firsts:



Wes Moore  
(D, MD)

First Black governor  
of MD



Sarah Huckabee Sanders  
(R, AR)

First woman  
governor of AR;  
First time any state has  
elected women as both  
Gov. and Lt. Gov.  
(a first shared with MA)



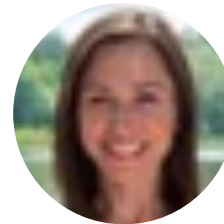
Maxwell Frost  
(D, FL-10)

Age 25, First Gen-  
Z member of  
Congress



Becca Balint  
(D, VT)

First woman House  
member from VT, the  
last state to elect a  
woman to the House



Katie Britt  
(R, AL)

First woman Senator  
from AL



Maura Healey  
(D, MA)

First openly-lesbian governors of any state



Tina Kotek  
(D, OR)

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# *Key Trends*

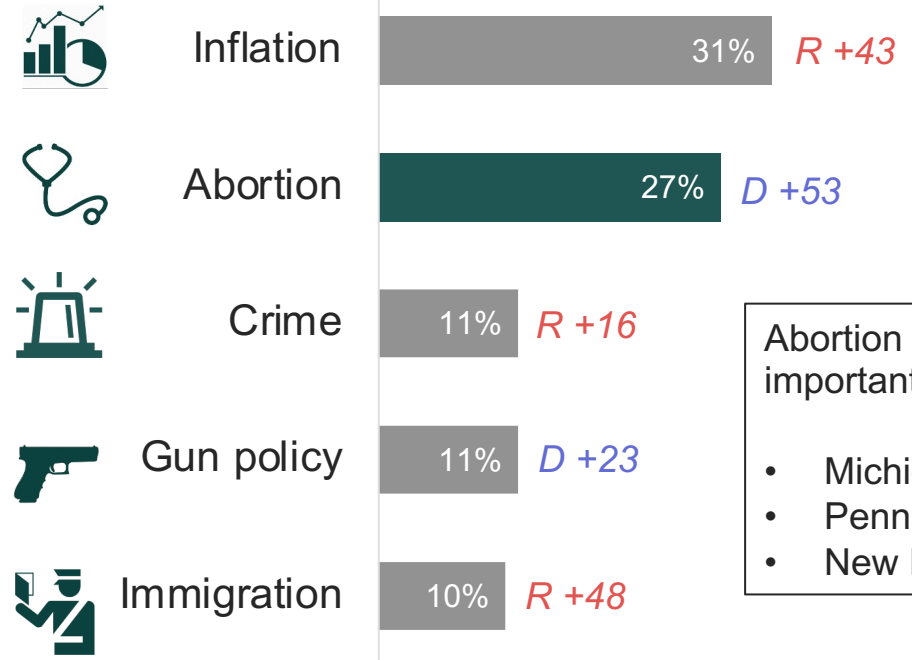
# Voters sent a clear message on abortion.

## 6 out of 6

Abortion ballot initiatives in 2022 went for the pro-abortion rights side.

### Abortion mattered almost as much as inflation in vote choices:

Showing the % that each party "won" on this issue



Abortion was #1 most important issue in:

- Michigan
- Pennsylvania
- New Hampshire

# Democrats held their coalition where it mattered.



## Independents

- In the last four elections, the party out of power carried Independent voters by double digits.
- This year, it flipped: the party in power won **Independents** by 2 points.



## 18-29

- This year, 18-29-year-olds didn't make up more of the electorate or break for Democrats more than they did in 2018.
- But they **swung further towards Democrats where it mattered**: PA, WI and AZ.



## Women

- Support among women decreased slightly compared to prior years (D +19 in '18 to D +8 in '22).
- But women voters **cared more about abortion than inflation** (33% vs. 28%). It struck a chord and likely drove turnout.



## Suburban

- The suburban vote has always been close, and this year was no exception.
- **Growing metro areas in key states** of AZ, PA, NV and GA mean some rural suburbs are becoming more urban – and more left-leaning – over time.

## *Republicans made inroads that can't be ignored.*



### **Florida Republicans – and Gov. DeSantis – shined.**

- GOP Gov. Ron DeSantis beat Dem. Charlie Crist by 19 points – the largest GOP governor win in Florida's history.
- Former Pres. Trump considers him a rival and has already released negative information about DeSantis.



### **Critical Senate seats in Ohio, Wisconsin and North Carolina held by GOP.**

- NC open Senate seat won by Trump-aligned Rep. Ted Budd in a competitive contest; WI held by Rep. Ron Johnson.
- Despite OH trending left in House races, Trump-supported J.D. Vance beat expectations to win the open Senate seat by 6 pts.



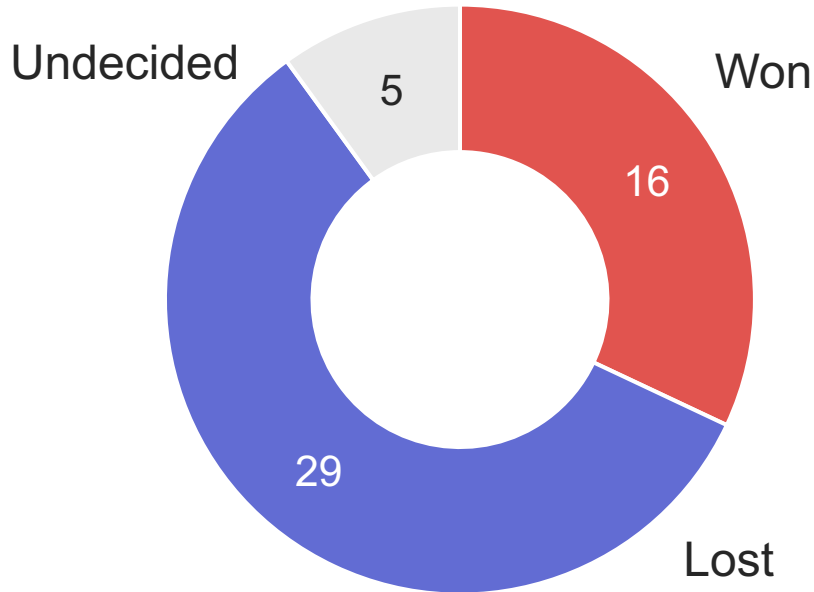
### **Gaining ground with Latino voters.**

- Latinos still largely vote Democratic (+21), but 2022 was the second election in a row where the GOP chipped away at their margins (2020 = D +33, 2018 = D +40).
- Much of this shift took place in FL – Latino voters leaned Democratic in 2018 but voted Republican in 2022.
- Young and female Latinos continue to vote solidly Democratic.

# Trump's candidates have so far failed in tight races.

## Election denier losses

In Congressional, Governor, or Sec. of State races rated "competitive" by Cook\*



All candidates for Sec. of State who denied the outcome of the 2020 election lost their races in AZ, MI, MN, NM, and NV.

## Trump-backed losses

In Senate, Governor, or Sec. of State races rated "competitive" by Cook\*

### 5 high-profile losses in governor's races.

- Losses in AZ, MI, KS, WI, and PA.
- Still waiting on AK.

### 3 high-profile losses in Senate races.

- Losses in PA, NV, and AZ.
- Still waiting for GA and AK.

### 2 losses for Secretary of State in AZ and MI.

- Both have major implications for 2024.

\*As of 11/15/22

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# *Looking Ahead*

- *What to expect for 2024*
- *Impacts on policymaking*
- *What brands need to know*

## *Key implications for 2024*

### **Pres. Trump is damaged by midterms.**

- However, he is still expected to announce a 2024 presidential run this Tuesday.

### **Ron DeSantis scored a breakout win.**

- Though some in the GOP suggest he should run in 2024, others say he should wait until 2028 to avoid an ugly primary battle with former Pres. Trump.
- Former Pres. Trump considers him a rival and has publicly lashed out at Gov. DeSantis since the midterms.

### **Pres. Biden gets a second wind from a stronger showing than anticipated.**

- He intends to officially announce whether he will run again in 2024 early next year.



# Midterm Policy Implications

## Lame Duck session:

- **Democrats will try to pass EOY priorities and nominations** (particularly judicial and regulatory agencies).
- **Reasonable Republicans may realize that passing anything next year will be nearly impossible.**

## Leadership changes:

- Senate Leadership on both sides will likely stay the same, although some Republicans are ginning up leadership concerns.
- McCarthy (R) now faces a torturous path to Speaker. Pelosi (D), who once considered stepping aside, will likely remain at the helm of a slim minority.

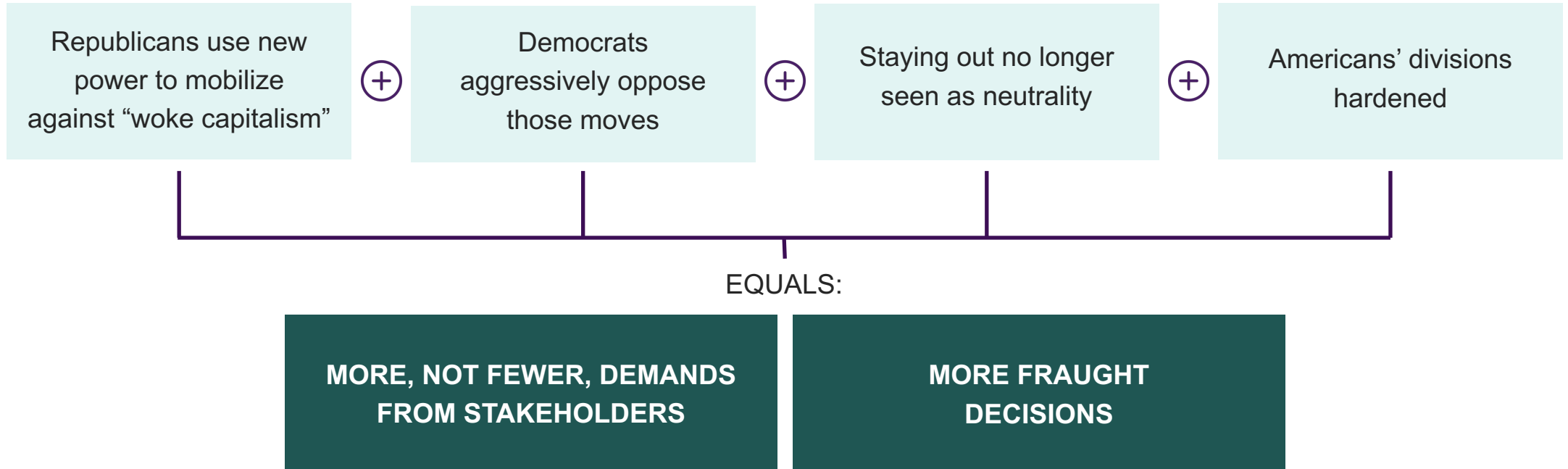
## Republicans will leverage their majority in advance of 2024:

- Focus on investigations and oversight of Biden, his Administration, and Regulatory Agencies
- With little policy overlap between parties and little incentive for bipartisan cooperation, there will be few legislative accomplishments
- Debt Ceiling and Appropriations past December 16th could become political footballs

## Focuses of the Biden Administration:

- Departures of some senior White House staff, cabinet- and sub-cabinet level officials
- Legislative gridlock will shift focus to advancing agenda through executive and regulatory actions
- The 2024 presidential cycle begins immediately

# *Companies and brands will need to remain prepared.*



**New Dynamic:  
War on Woke vs. War on Talent**

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# *Thank You*

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