

May 2022

OUTLOOK FOR THE 2022 MIDTERM ELECTIONS





Anxiety and Division



MIDTERMS WILL TAKE PLACE AS AMERICANS HAVE DEEP CONCERNS ABOUT THE FUTURE



**58% of
Americans**

say things in the U.S. are off
on the wrong track

Causes of concern:

| Economic concerns:

- > 81% believe the U.S. economy is likely to experience a **recession in 2022**
- > The **rising cost of food and gas due to inflation** is putting stress on American families who report cutting back on a variety of expenses

| Russia's invasion of Ukraine:

- > 64% are concerned about Russia's influence around the world
- > U.S. adults are split on what should be the bigger priority for the U.S. in response to Russia's invasion of Ukraine – sanctioning Russia as effectively as possible (51%) or limiting damage to the U.S. economy (45%)



DEEPLY EMOTIONAL ISSUES ARE BEING FOUGHT IN STATE LEGISLATURES ACROSS THE U.S.



School Curriculum

- | Only **24%** of Americans believe that schools in their areas spend too much time teaching about race, compared to 53% who believe they spend about the right amount or not enough time
- | But **42 states** have introduced bills that would limit public schools' ability to teach about race, gender, and sexuality



Abortion Rights

- | A leaked draft opinion from Justice Alito suggests SCOTUS is set to overturn *Roe v. Wade* this summer. The decision would mean that abortion rights are no longer protected at the federal level; states will have the right to enact reaching restrictions.



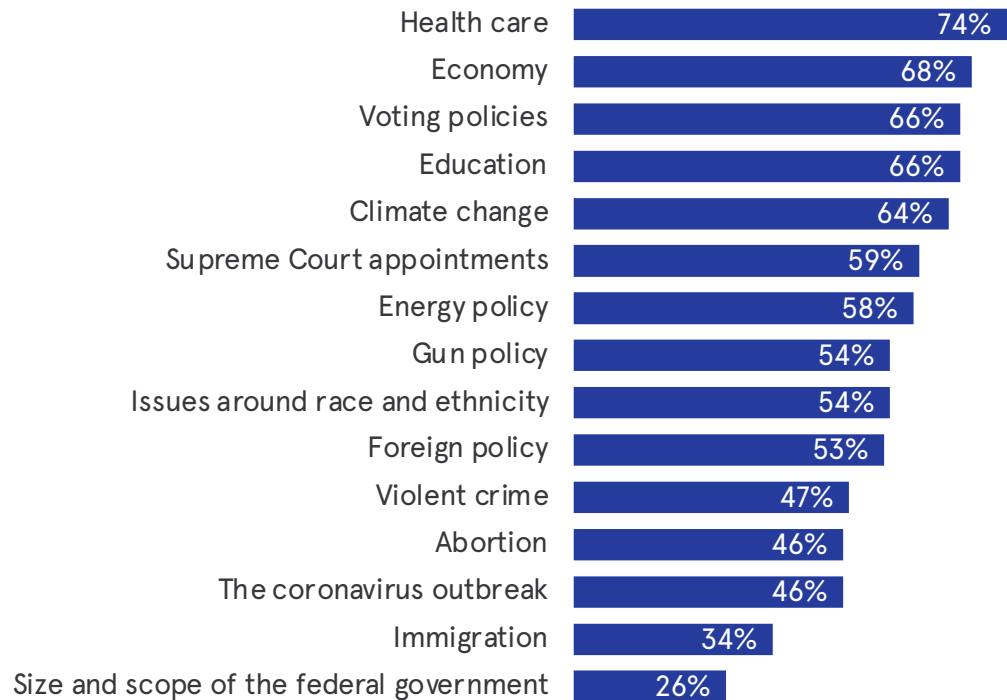
Voting Rights

- | 27 states have introduced bills with restrictive voting provisions including stricter voter ID requirements and limits to same-day voter registration

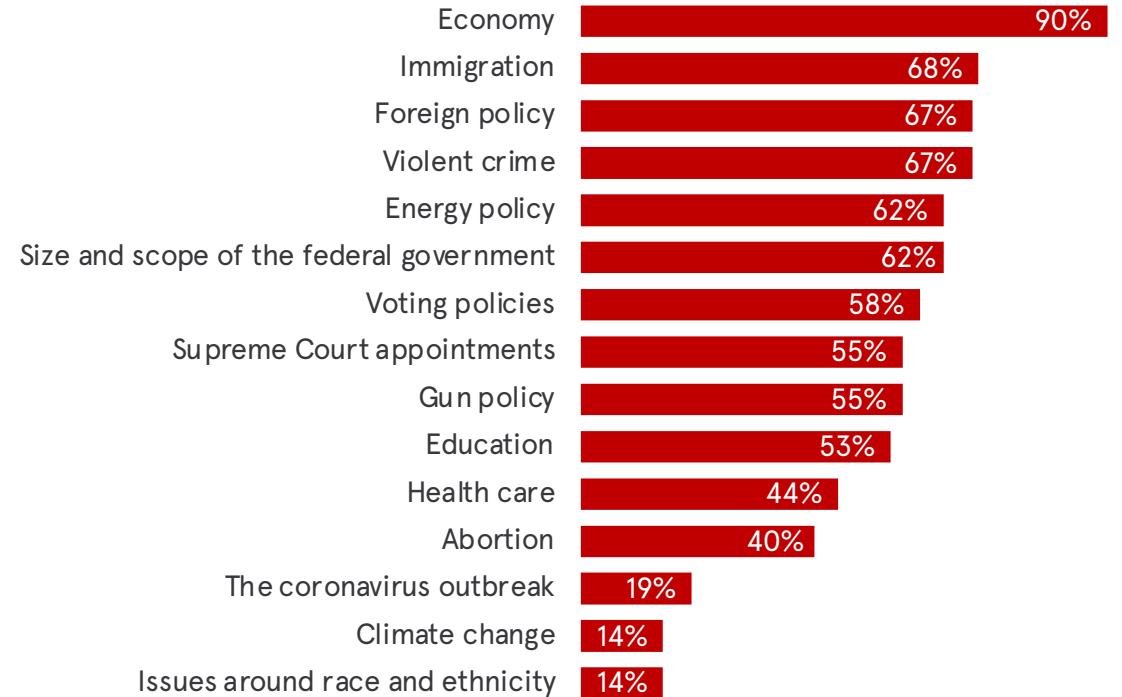


DIFFERENT ISSUES WILL DRIVE THE CONVERSATION ON EACH SIDE OF THE AISLE

Very Important to Democrats:



Very Important to Republicans:





Presidential Performance



AMERICANS ARE DISSATISFIED WITH PRESIDENT BIDEN'S FIRST YEAR DESPITE NOTABLE ACCOMPLISHMENTS

56% thought Pres. Biden's first year was a failure

54% think Pres. Biden is not fulfilling campaign promises

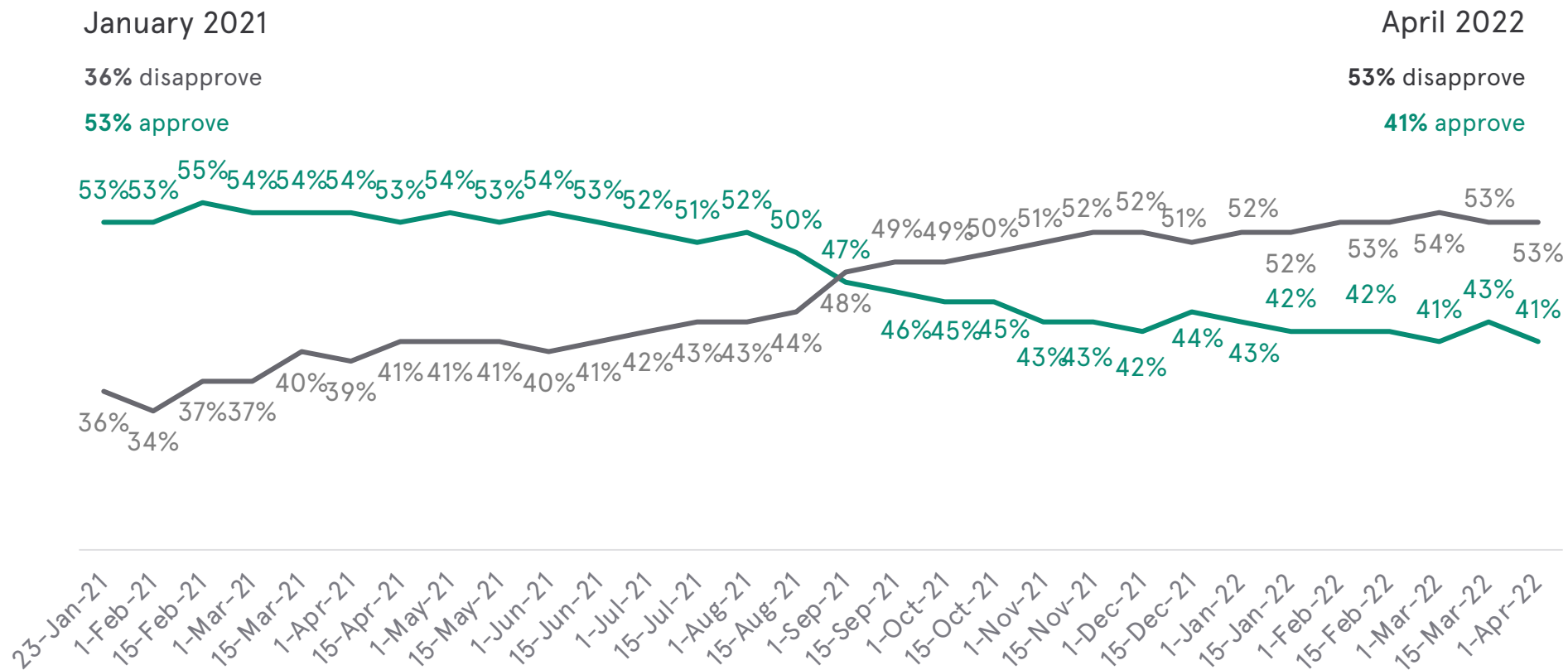
52% think Pres. Biden is doing more to divide the nation than unite it

Signed into law during President Biden's first year:

- | **American Rescue Plan Act:** \$1.9 trillion focused on U.S. economic recovery from the COVID-19 pandemic including stimulus payments, increased unemployment benefits, and expansion of the child tax credit
- | **Infrastructure Investment and Jobs Act:** \$1.2 trillion for American "hard" infrastructure such as roads and bridges
- | **Two stopgap bills to avoid government shutdown**
- | **Juneteenth National Independence Day Act:** Established June 19 as a U.S. federal holiday commemorating the end of slavery in the U.S.
- | **Uyghur Forced Labor Prevention Act:** Banned imports from China's Xinjiang region unless proven they were not made with forced labor



APPROVAL RATINGS ARE DOWN AMONG BOTH DEMOCRATS AND INDEPENDENTS



Approval among:

- Democrats: 84%**
(-14 points from inauguration)
- Republicans: 5%**
(-6 points from inauguration)
- Independents: 35%**
(-26 points from inauguration)

Source: 538 aggregate of current polls, 1/23/2021-4/1/2022 (<https://projects.fivethirtyeight.com/biden-approval-rating/>); Gallup, 1/21-12/16/2021 (<https://news.gallup.com/poll/329384/presidential-approval-ratings-joe-biden.aspx>)



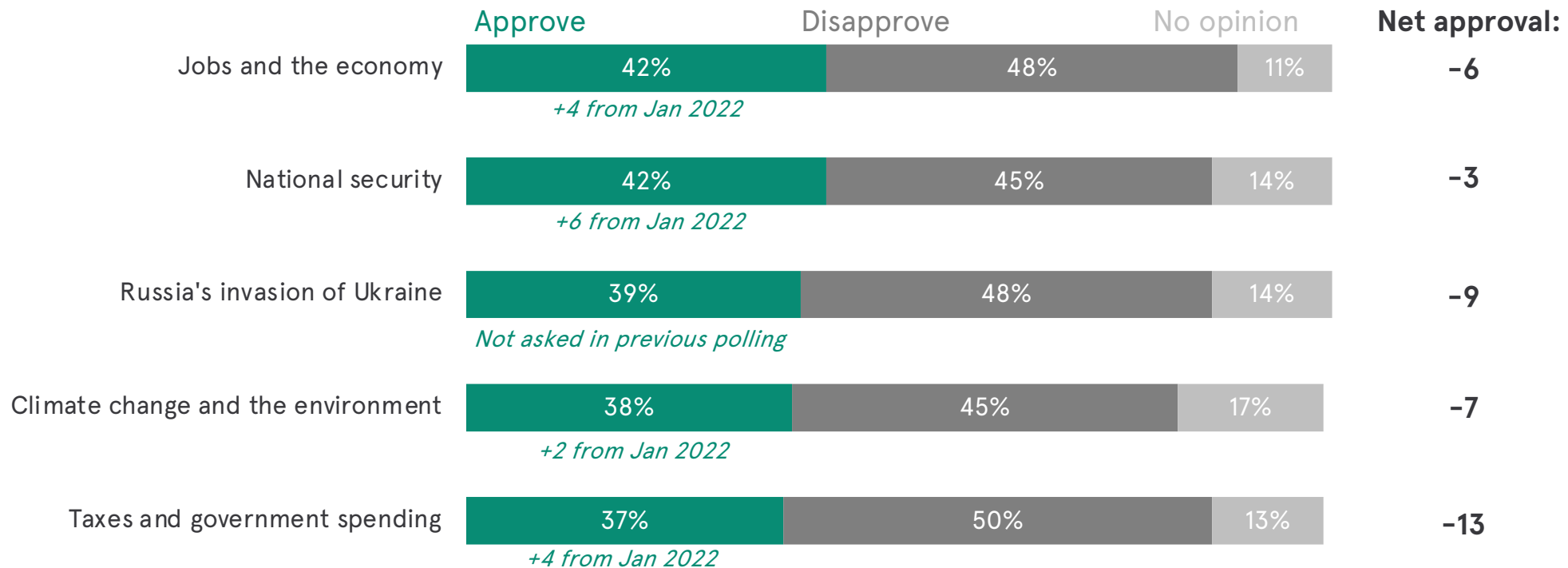
APPROVAL RATINGS ARE ESPECIALLY LOW IN KEY SENATE STATES

State	2020 Presidential Election Result	Q1 2021 Net Pres. Biden Approval	Q1 2022 Net Pres. Biden Approval
Nationwide	Biden +4.5	+15	-12
Arizona	Biden +0.3	+8	-14
Georgia	Biden +0.16	+12	-12
Nevada	Biden +2.4	+10	-12
New Hampshire	Biden +7.3	+9	-13
Pennsylvania	Biden +1.2	+9	-15
Wisconsin	Biden +0.63	+7	-16



THE PRESIDENT IS UNDERWATER ON KEY ISSUES THAT CAUSE VOTER ANXIETY

Approval of Biden's performance on key issues:



REPUBLICANS ARE MORE ENTHUSIASTIC ABOUT VOTING IN 2022; YOUNG VOTERS MAY POSE CHALLENGES FOR DEMOCRATS

**67% of
Republicans**

are very interested in the
2022 midterm elections

**50% of
Democrats**

are very interested in the
2022 midterm elections

Young voters:

- | **Concerns about turnout:** Younger voters had strong turnout numbers in 2020, but only 36% of 18–29 year olds currently believe they will definitely/very likely vote in 2022.
- | **Don't have strong party ties:** Younger voters are less likely than older generations to identify with either party, and sizable numbers believe the Democratic and Republican parties care more about the elite than people like them (39% and 51% respectively).
- | **Student loans:** 85% of young Americans support some form of government action on student loan debt, with 38% supporting total debt cancellation





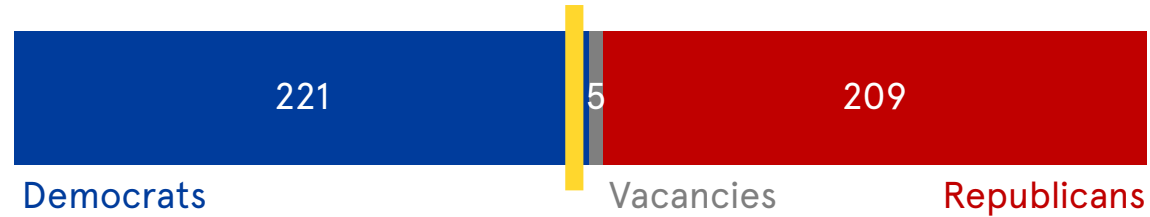
Looking Ahead



THE DEMOCRATS' NARROW MAJORITY IS ON THE LINE IN 2022

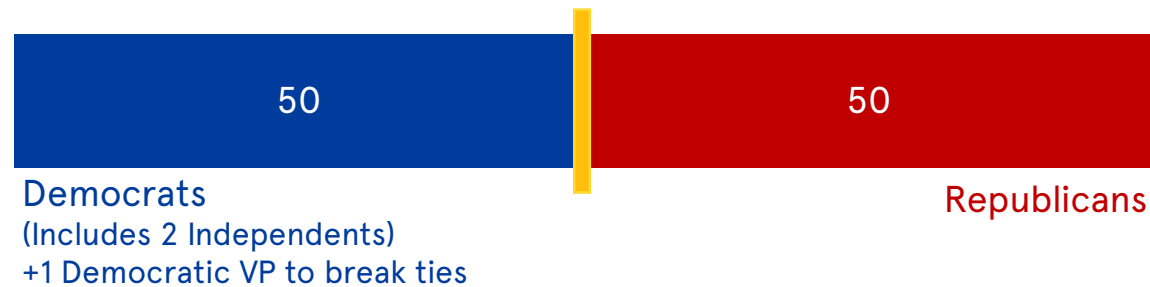
Current House:

GOP needs 9 seats to take the House in 2022



Current Senate:

GOP needs 1 seat to take the Senate in 2022



THE GOP HAS HISTORICAL AND STRUCTURAL ADVANTAGES GOING INTO NOVEMBER



History

- | The President's party historically loses seats – 27 on average.
- | Only Clinton ('98) and Bush ('02) gained seats in the midterm election over the past 30 years. Both had approval ratings over 60%.



Redistricting

- | New state maps have been drawn after the 2020 census.
- | **TX**: +2 seats
- | **CO, OR, FL, MT, NC**: +1 each
- | **CA, IL, MI, NY, PA, OH, WV**: -1 each



The Virginia and New Jersey Playbooks

- | Biden won Virginia in 2020. The GOP candidate (Youngkin) won the Governor's race by 2 points – a shift of 12 points in the GOP's favor.
- | Biden won New Jersey in 2020 by 17 points. The Democratic candidate (Murphy) won the Governor's race by 3 points – a shift of 14 points in the GOP's favor.

But who will break through in the primaries?

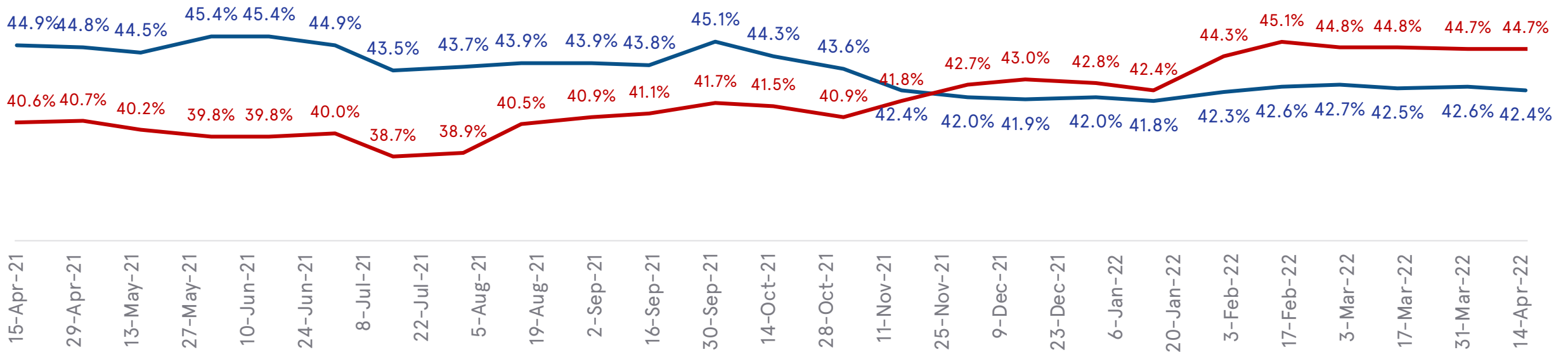
- > Pres. Trump's support for controversial primary challengers may cause headaches for the GOP.
- > Pundits are watching if Democrats run progressives or moderates in the battleground.



THE GENERIC BALLOT HAS SHIFTED TO FAVOR REPUBLICANS

April 15, 2021
D +4.3

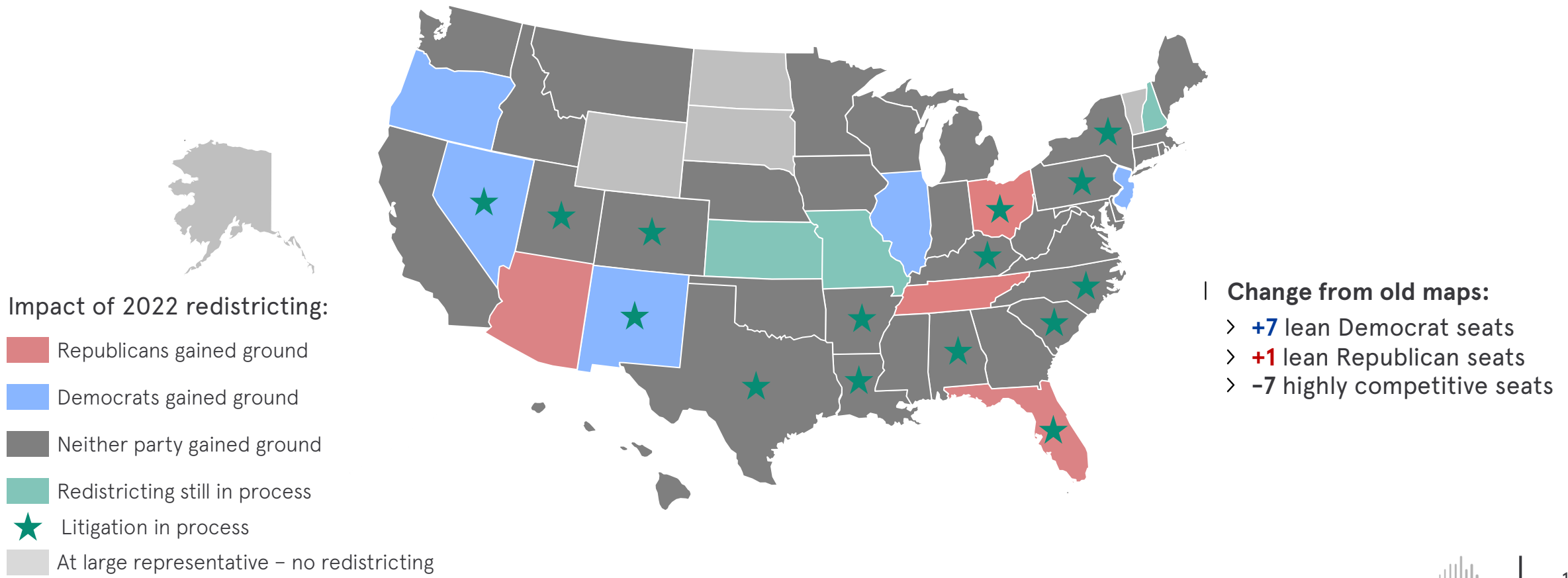
April 15, 2022
R +2.3



Source: FiveThirtyEight (<https://projects.fivethirtyeight.com/congress-generic-ballot-polls/>), June 15, 2018; estimate based on polls from 23 different pollsters



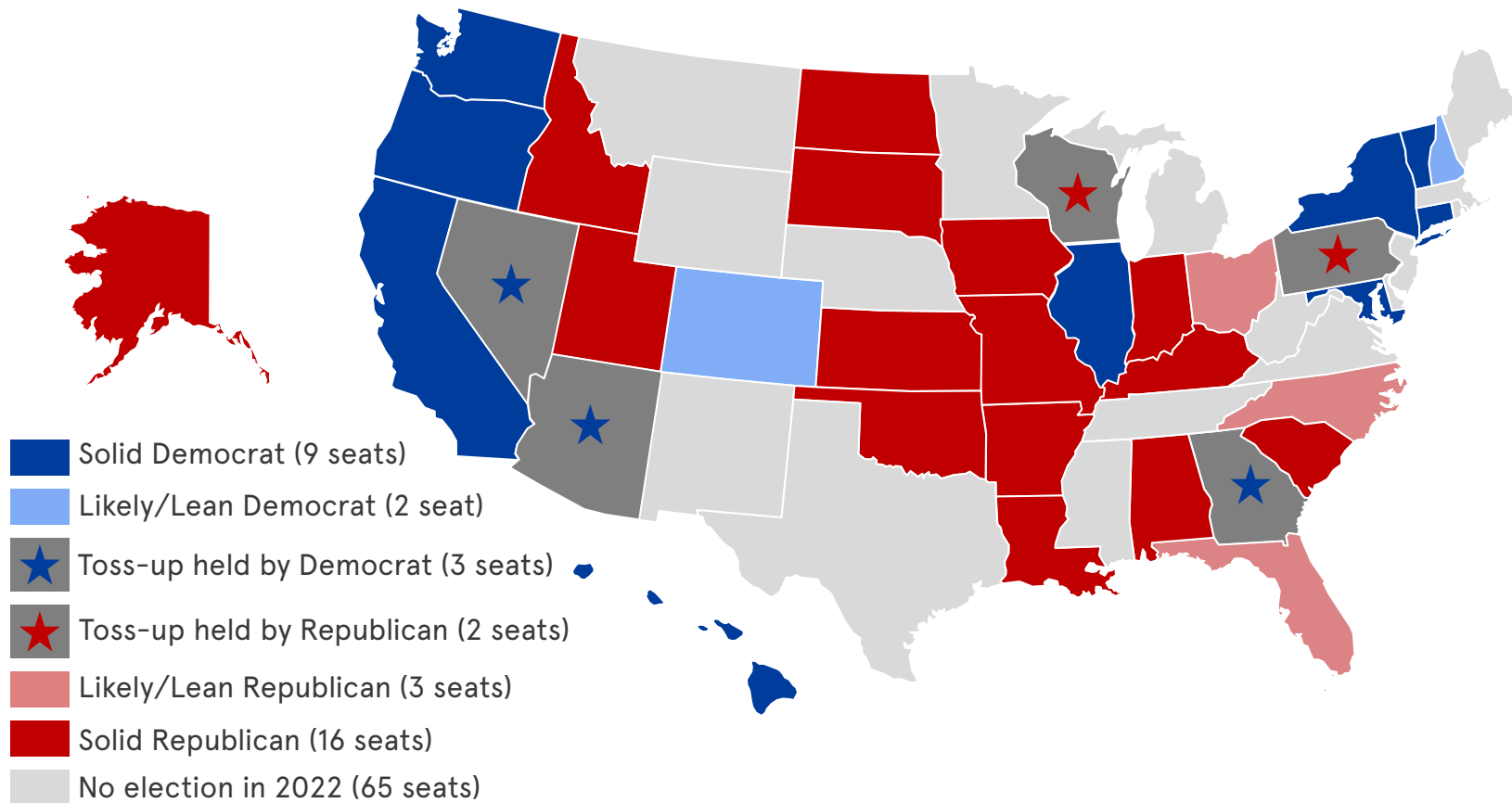
MAPS ARE STILL BEING DRAWN BUT LESS GOP ADVANTAGE THAN ONCE THOUGHT



Source: FiveThirtyEight, 4/25/2022 (<https://projects.fivethirtyeight.com/redistricting-2022-maps/>); Cook Political Report, 1/4/2022 (<https://www.cookpolitical.com/analysis/house/house-overview/2022-house-overview-still-gop-advantage-redistricting-looks-wash>)



SENATE: REPUBLICANS ARE DEFENDING MORE SEATS BUT THEY ONLY NEED TO FLIP ONE



STATES TO WATCH

- | Only 5 seats are true toss-ups
- | Two are held by the GOP:
 - > Incumbent **Sen. Ron Johnson (WI)**
 - > Retiring **Sen. Pat Toomey (PA)**
- | Three are held by Democrats:
 - > Incumbents **Sen. Mark Kelly (AZ)**, **Raphael Warnock (GA)** and **Sen. Catherine Cortez Masto (NV)**
- | The GOP is targeting the seat held by **Sen. Maggie Hassan (NH)**



HOUSE: THE GOP ONLY NEEDS 9 SEATS TO TAKE CONTROL

| The RNCC is targeting more seats than the DCCC:

- › Of the 31 seats the DCCC is targeting, **7 are suburban districts Democrats held before the 2020 election**
- › The RNCC is targeting 72 seats:
 - **23 districts that Biden did not carry** or that **Biden carried by 5 points or less**
 - **33 districts where Biden won by <10 points**

| Democrats are defending twice as many toss up seats as Republicans:

- › 27 House seats are currently rated “toss ups” – 19 are held by Democrats and 8 are held by Republicans

| Democrats are retiring in higher numbers (30 to 18), though most are in safe seats

- › Several Republicans are running for higher office including open Senate seats
- › Four of the Republicans retiring from public office voted to impeach Pres. Trump



ALL EYES WILL BE ON SUBURBAN VOTERS AND DISTRICTS HEADING INTO NOVEMBER



The suburbs have continued to grow in recent years.

- › Throughout COVID-19, more Americans have been moving to the suburbs, particularly in the south and southwest.
- › In two sunbelt states with toss up Senate elections Democrats have been improving their performance in the suburbs, specifically in Maricopa County, AZ and Clark County, NV.



Suburban voters are focused on practical issues like the economy and education.

- › They are concerned about rising crime, and don't respond to Democrats' calls to defund the police.
- › These voters are also not excited by the Trump wing of the Republican party's extreme views on social issues.



Though the suburbs were important for Biden's win in 2020, Democrats will face challenges without Trump on the ticket.

- › In 2020, 26% of Biden voters selected him because they did not like Trump's policies, compared to only 9% of Trump voters who cast their vote because of opposition to Biden.
- › Republicans picked up 15 seats that were almost all in the suburbs in 2020.
- › Suburban areas in Virginia were crucial to the Republican gubernatorial candidate Youngkin's win in 2021.



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