



A Hawthorn Group

visit with

**National Association of
Water Companies**

April 5, 2022

Agenda

- I. What's in Play in 2022**
- II. What We Know**
 - The (Sometimes Disputed) Known Knowns*
- III. What We Don't Know**
 - The Known Unknowns*
- IV. What We Really Don't Know**
 - The Unknown Unknowns*
- V. What We Think Will Happen**
- VI. What Voters Are Seeing**
- VII. Your Questions and Comments**



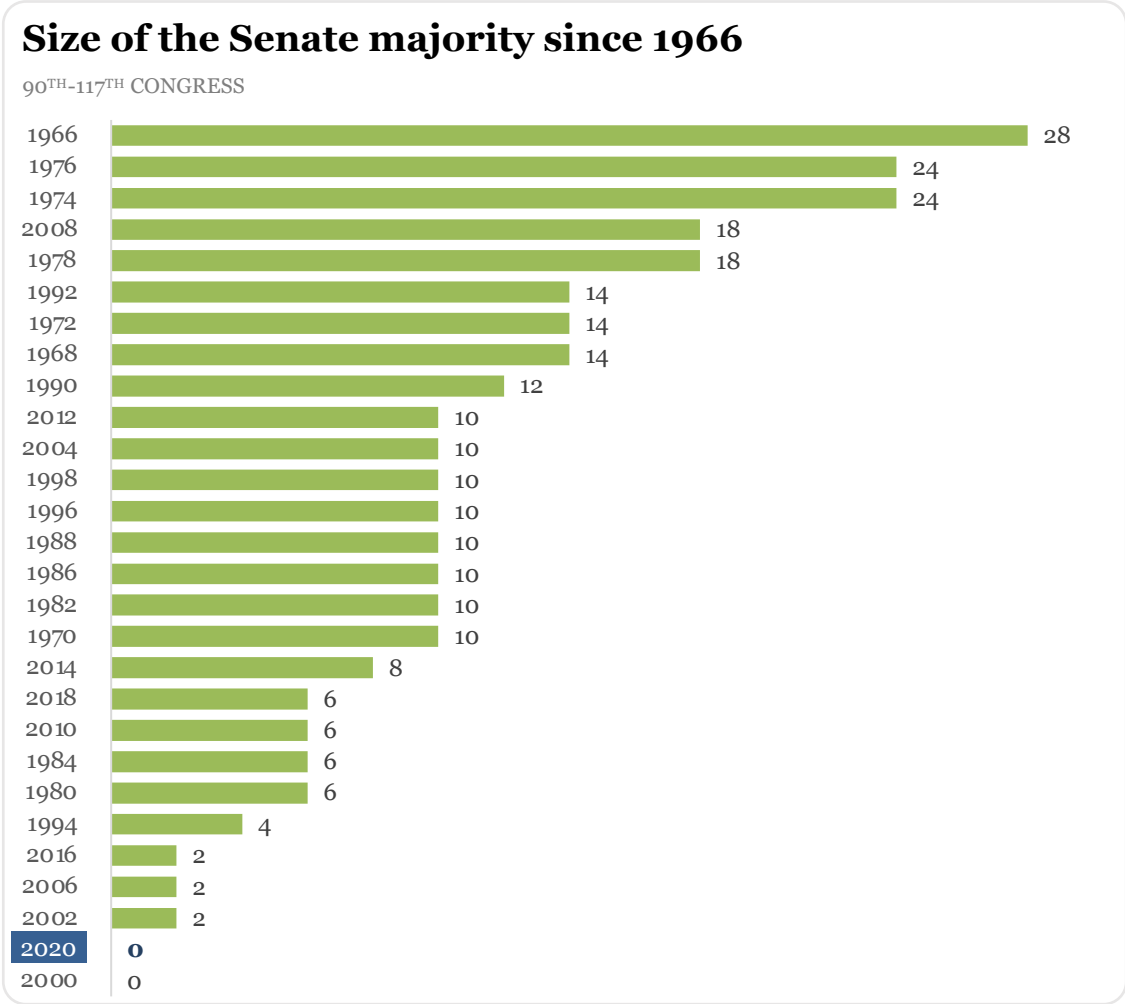
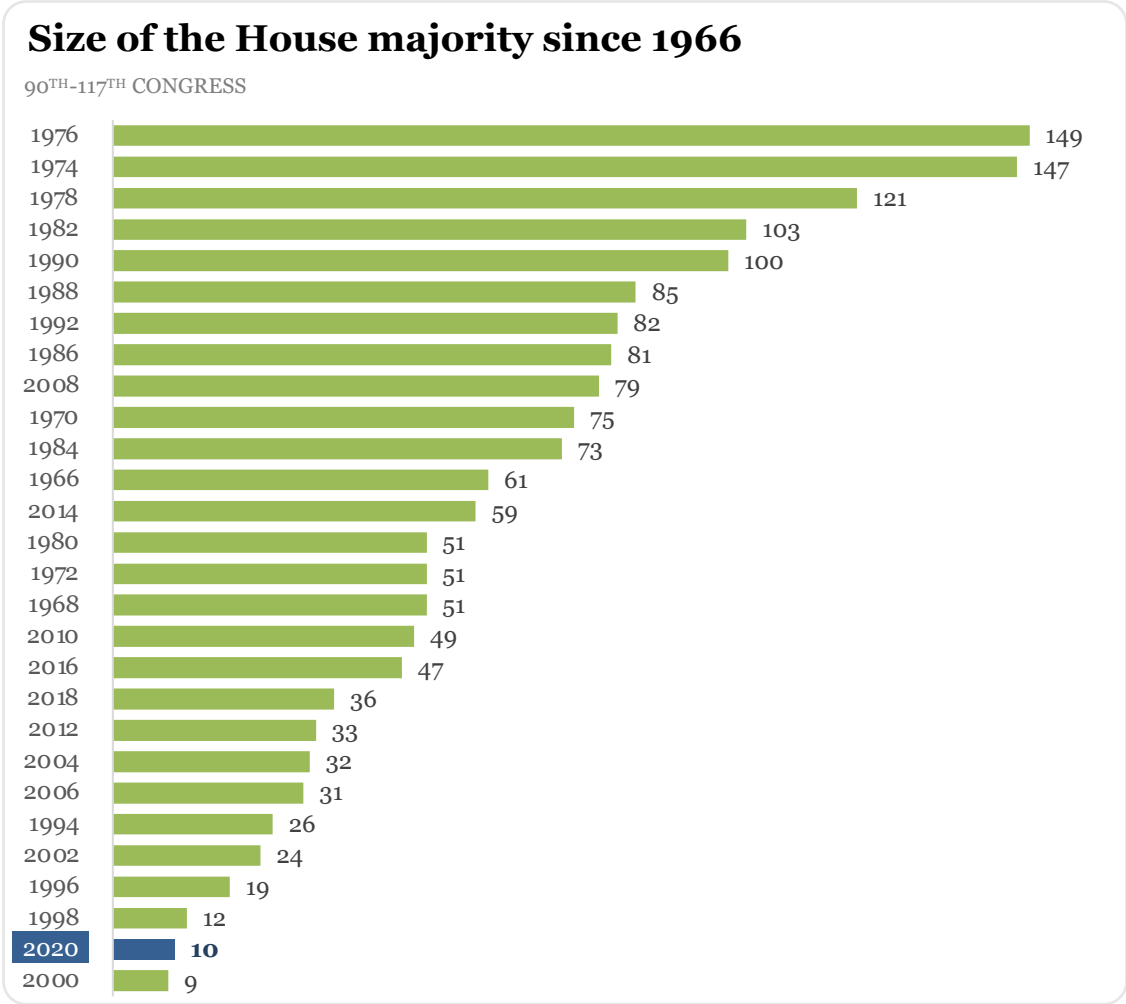
I. What's In Play in 2022

What's in Play in 2022

- **35* U.S. Senate Seats** – Currently **50D** – **50R**
– **14D** vs. **21R*** (Retiring **1D** vs. **6R***)
- **435 U.S. House** – Currently **222D** – **210R**- 3 Vacancies
– **222D-213R** (Not Seeking Re-Election **31D** vs. **19R**)

* Sen. Inhofe (R-OK) retirement's special election will take place during 2022 General Election.

Democrats have unusually narrow majorities in both chambers of Congress



Figures represent the size of the House and Senate majorities at the start of each Congress.

What's in Play in 2022

- **36 Governors** –Currently **22D** – **28R**
– **16D** vs. **20R** (Term-Limited/Retiring **3D** vs. **5R**)
- **229 State Executive Offices**
- **6,166 State Legislative Seats**
- **78 statewide ballot measures** have been certified for the ballot in 31 states.
- **Major Mayors** – Austin, Charlotte, DC, Detroit, LA, Newark, San Jose
- **Foreign Elections** – Australia, Brazil, Colombia, France, Hungary, Kenya, Korea, Philippines, Republic of Congo



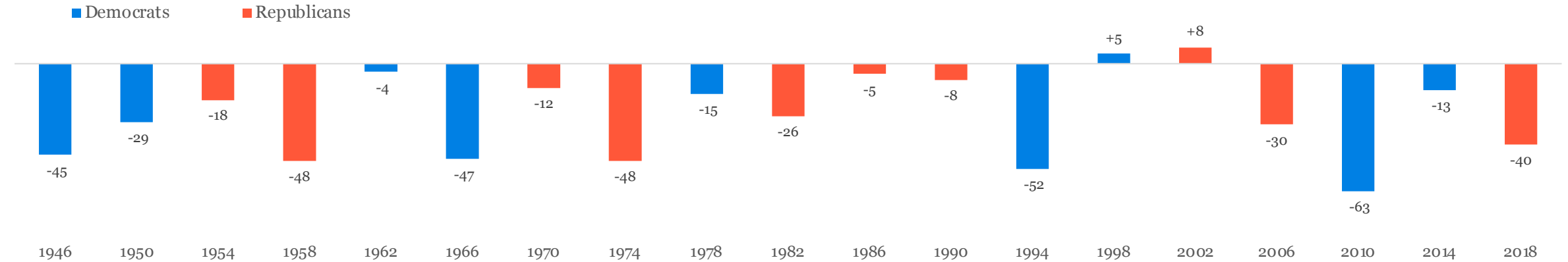
II. What We Know

***The (Sometimes Disputed)
Known Knowns***

1 Historically, the president's party loses seats in midterm elections

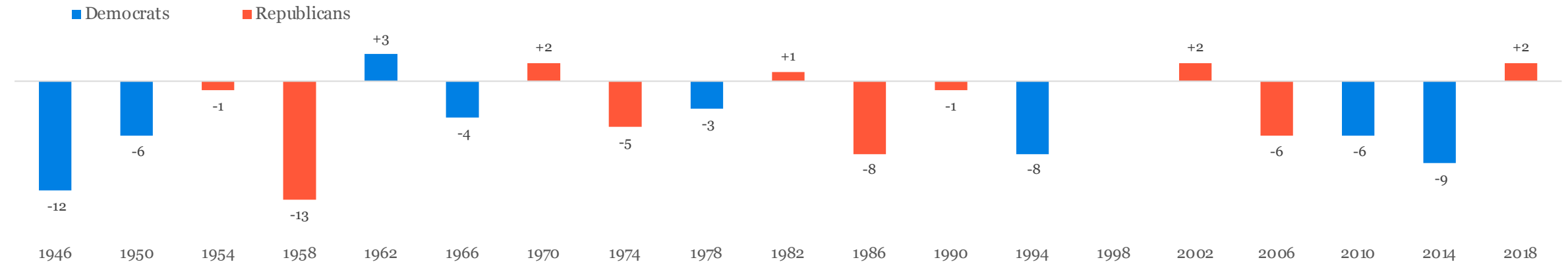
President's party gain/loss of seats in House

MIDTERM ELECTIONS, 1946-2018



President's party gain/loss of seats in Senate

MIDTERM ELECTIONS, 1946-2018

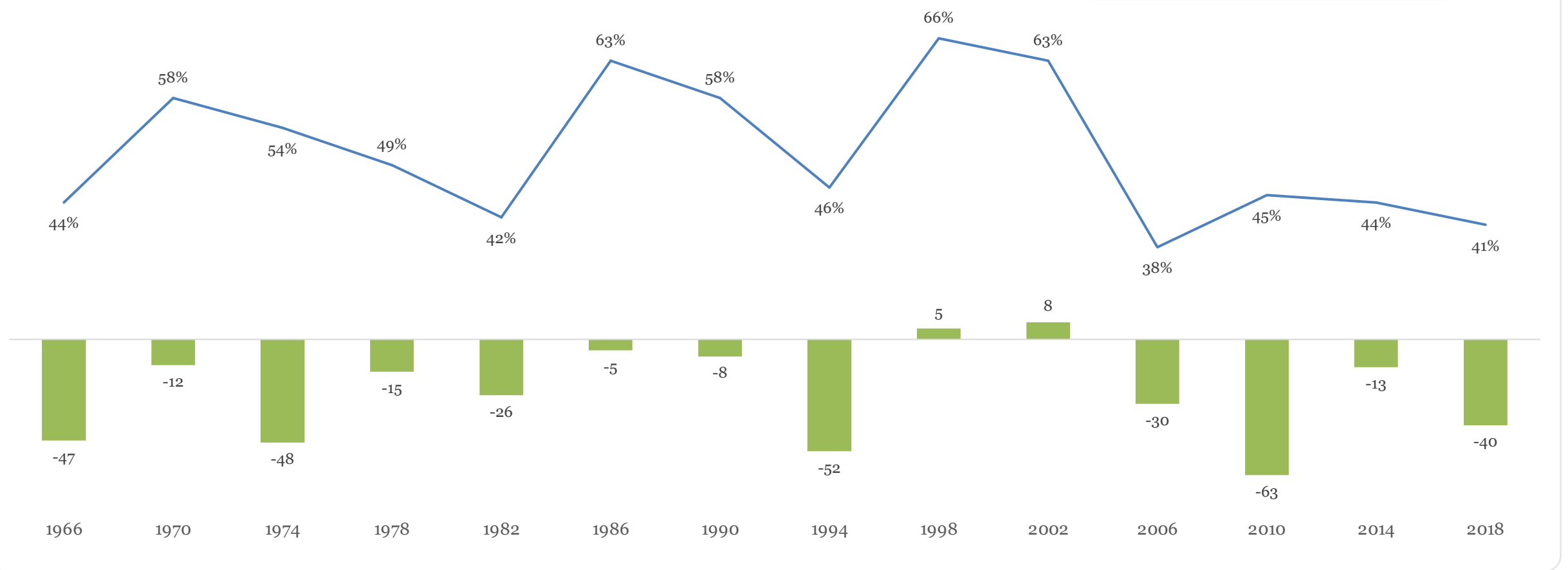


1 Presidents with a sub-50% approval rating lose an average of 36 House seats in the midterms

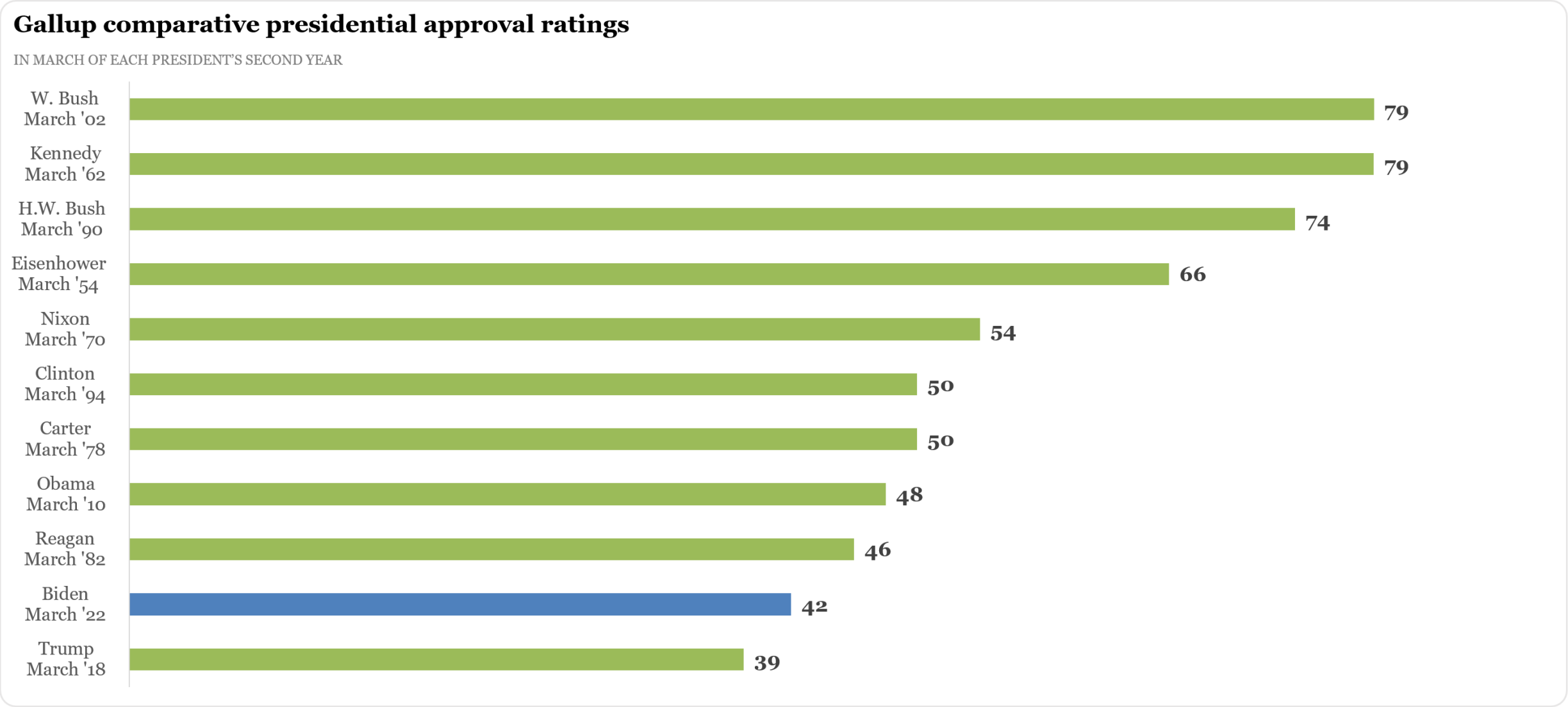
Presidential job approval vs. midterm results since 1966

■ Gallup presidential approval the week before the midterm
■ House seats gained/lost by president's party in the midterm

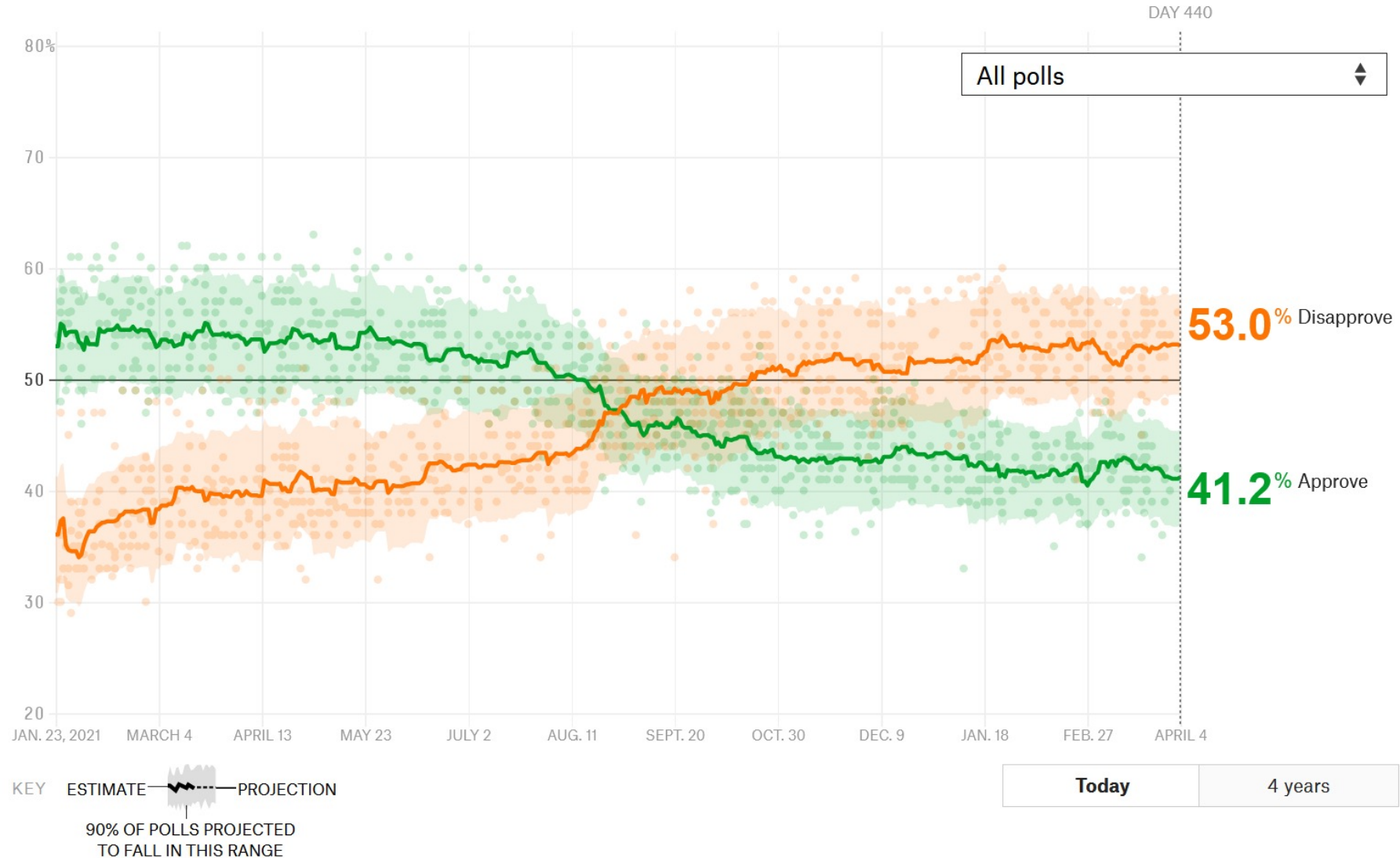
JOB APPROVAL	AVERAGE CHANGE
Over 60%	+3 Seats
50%-60%	-12 Seats
Under 50%	-40 Seats



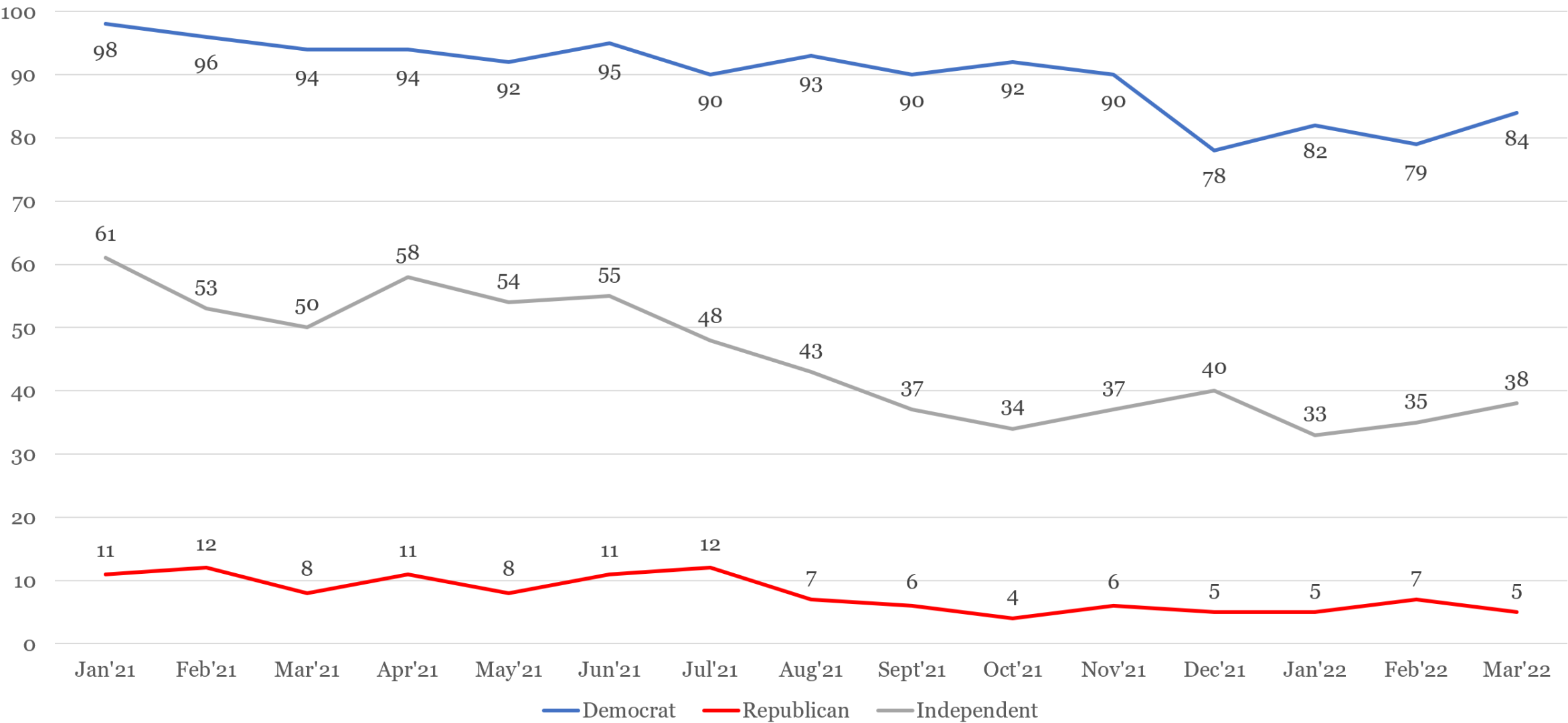
2 Biden's job approval rating is lower than those of most recent presidents at this point in their presidencies



2 Biden Job Approval Since Inauguration

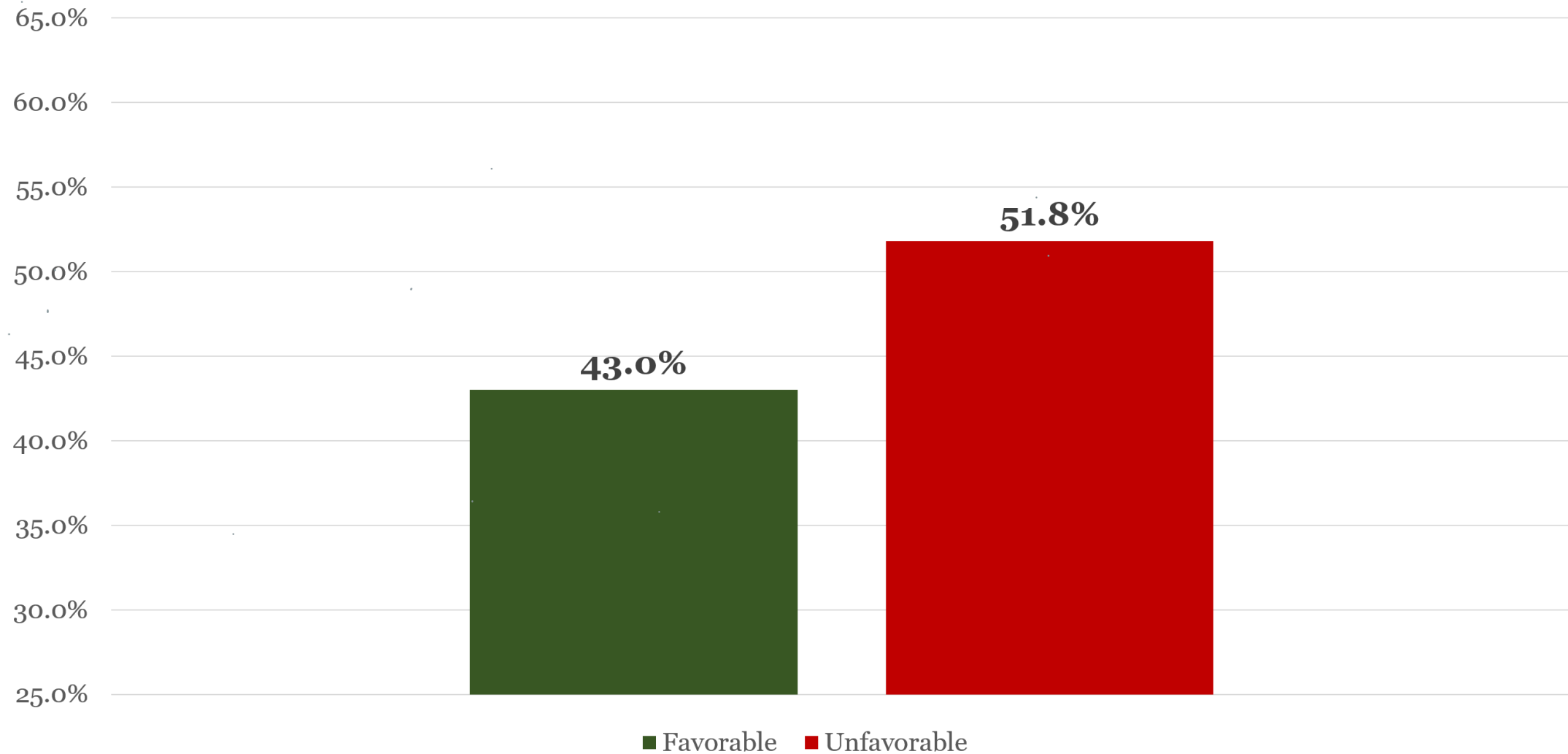


2 Biden Approval Since Inauguration by Party ID



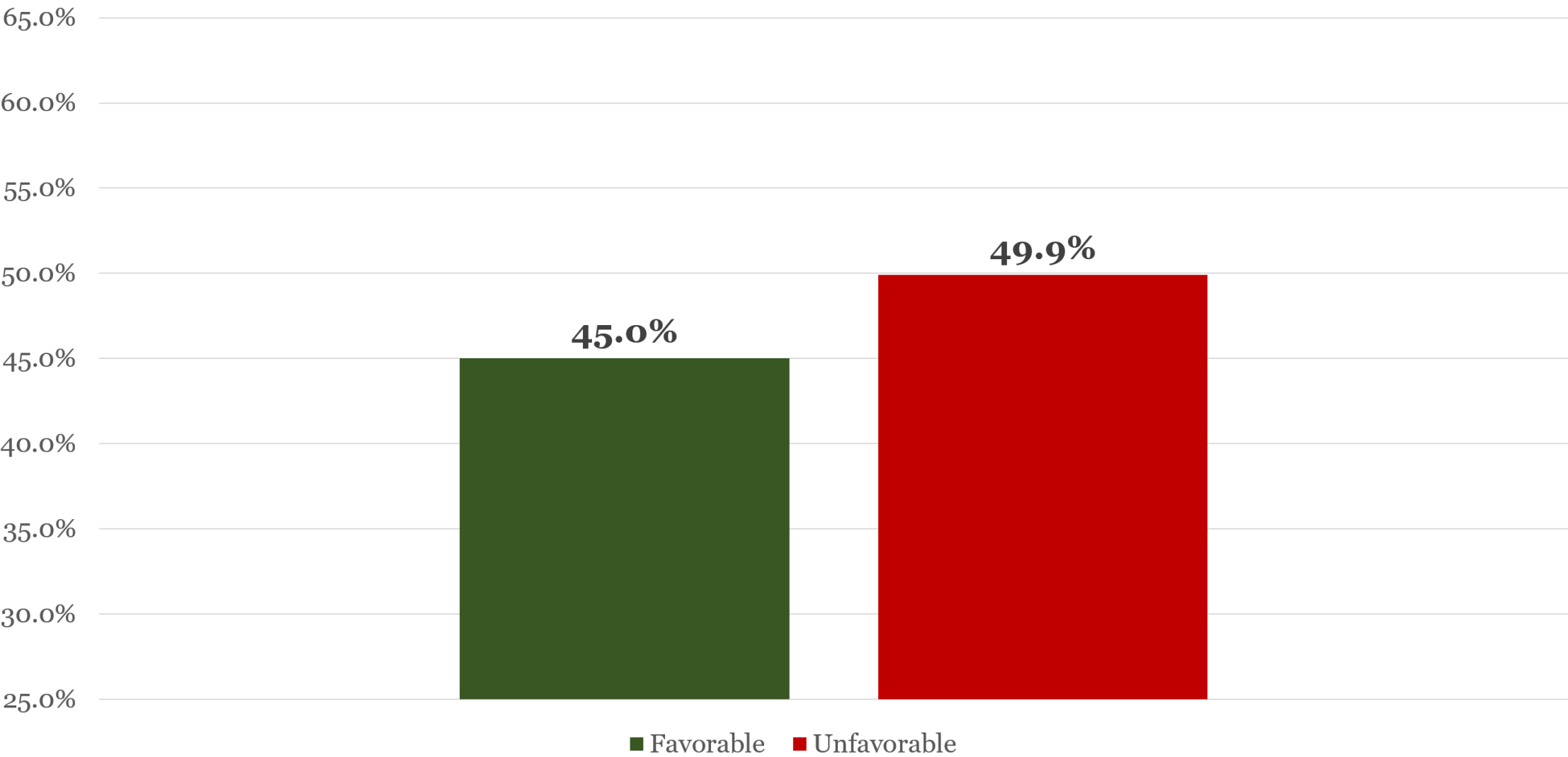
Source: Gallup

2 Biden Personal Favorability



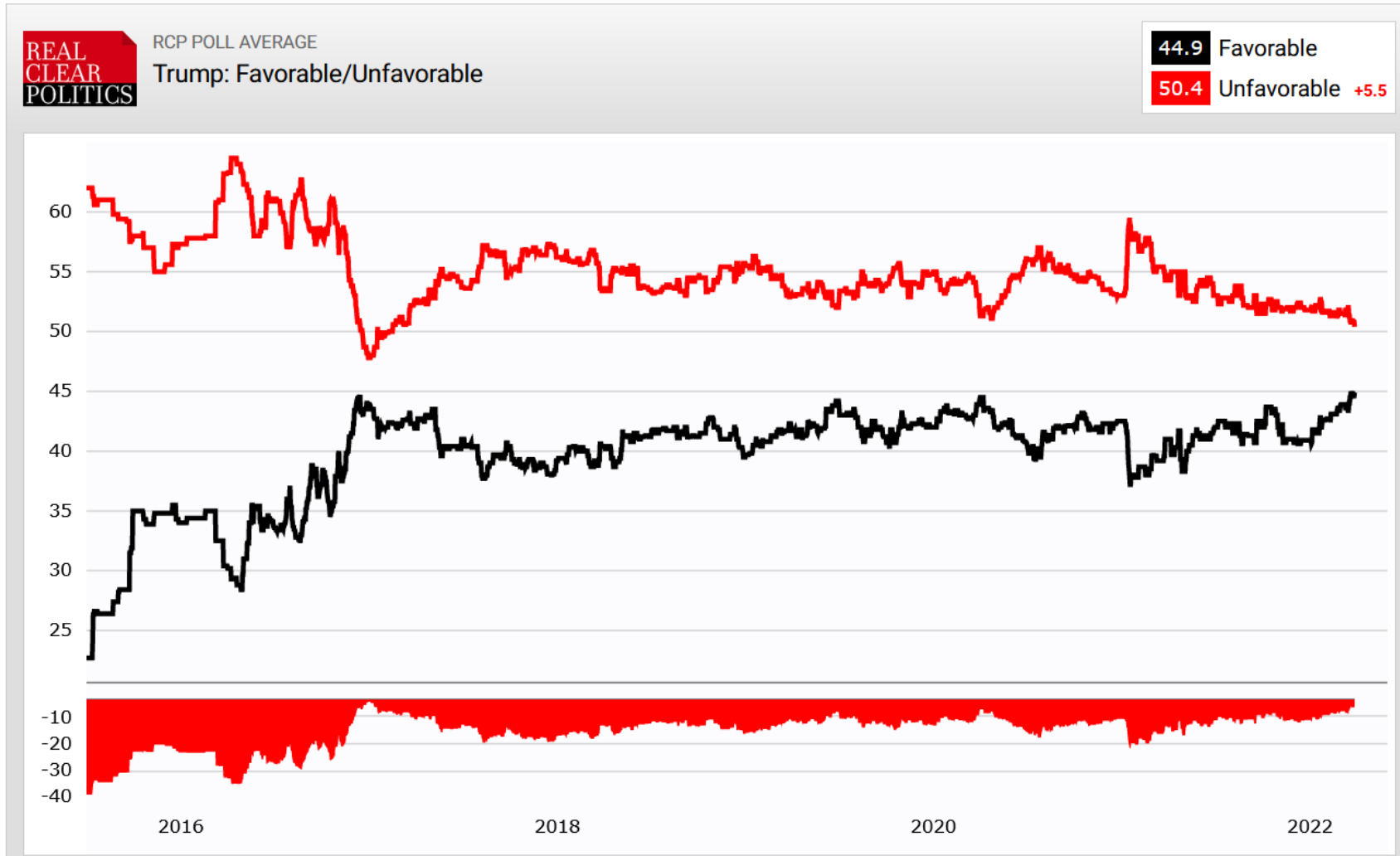
Source: RCP Average 2/3/22 - 3/29/22

2 Trump Personal Favorability



Source: RCP Average 2/3/22 - 3/29/22

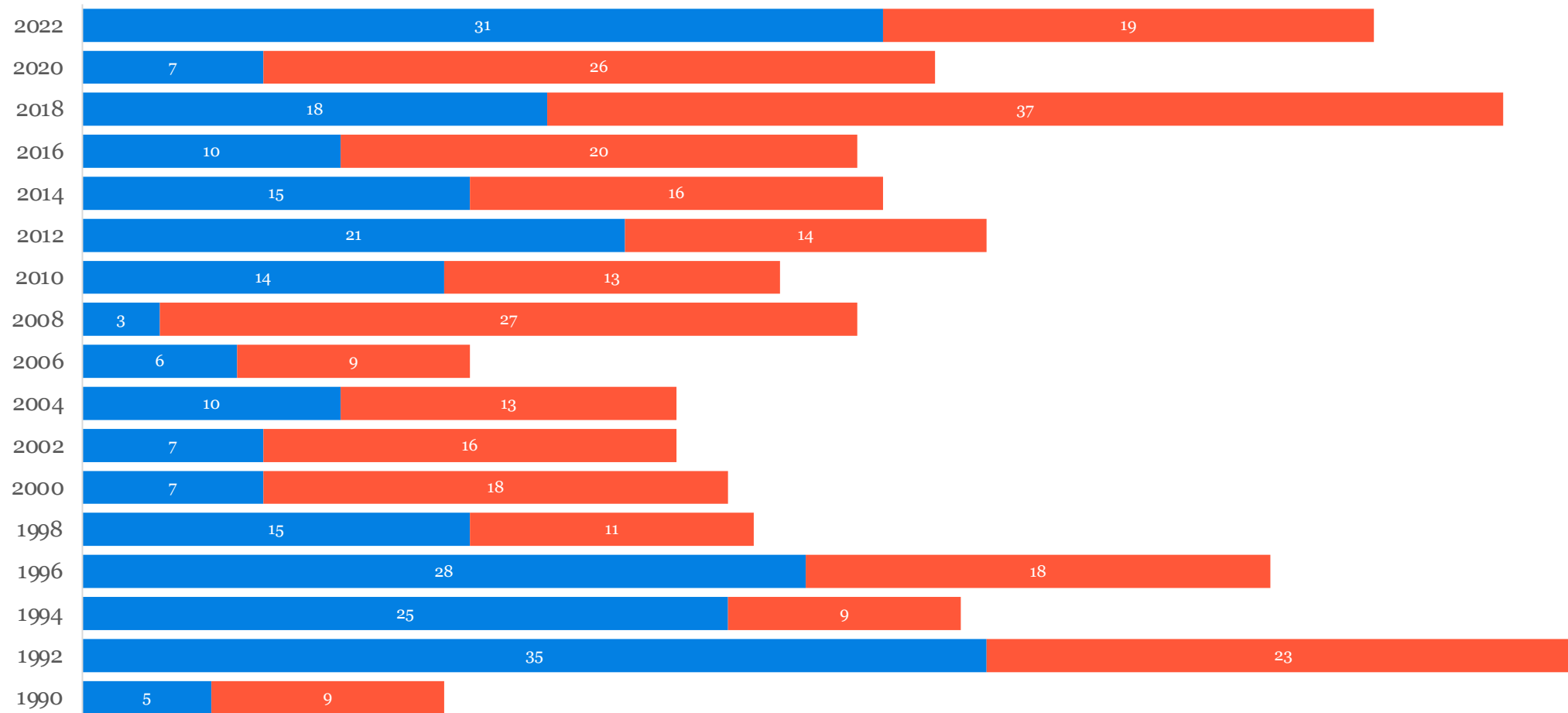
2 Trump Personal Favorability (Since 2015)



3 Most Democratic Retirements Since 1992

Retirements from Congress, by election cycle

■ Republicans ■ Democrats



*Data includes retirements and members of Congress seeking a different office; does not include members of Congress who resigned from or otherwise vacated their seat before the 2022 election



S O U R C E FiveThirtyEight, Ballotpedia, Roll Call, Charlotte Observer, Politico, AP News, Texas Tribune, The Hill

Voter Enthusiasm

Tracking Very Interested in the Election *



National Data/NBCWSJ & NBC News



			<i>Net Difference</i>	<i>Pick up House Seats</i>
2006	56%	69%	+13%	+30
2010	66%	49%	+17%	+63
2014	59%	48%	+11%	+13
2018	57%	66%	+9%	+40
January 2022	61%	47%	+14%	??
March 2022	67%	50%	+17%	

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2014	59%	48%	+11%	+13
2018	57%	66%	+9%	+40
January 2022	61%	47%	+14%	??
March 2022	67%	50%	+17%	

4 Recent Election Results

- **Virginia Governor**
- **Virginia Lt. Governor, Attorney General, State House**
- **New Jersey State Senate President**
- **San Francisco School Board**

- **California Governor Recall**

2021 California Gubernatorial Recall Election

Results

No: 61.9%

Yes: 38.1%

Spent

Against recall (pro-Newsom): \$88,437,450

For recall (anti-Newsom): \$19,252,030

4 GOP Anxieties

- **Recruitment Failures**
- **Trump Vengeance**
- **Trump Challengers**
- **Russia**

5 Fundraising – January 1, 2021 – February 28, 2022

Democratic National Committee	\$172.0 Million
Democratic Senatorial Campaign Committee	\$116.9M
Democratic Congressional Campaign Committee	\$177.4M
Republican National Committee	\$188.0M
National Republican Senatorial Committee	\$134.6M
National Republican Campaign Committee	\$161.5M
Trump's Save America PAC	\$110.0M



III. What We Don't Know

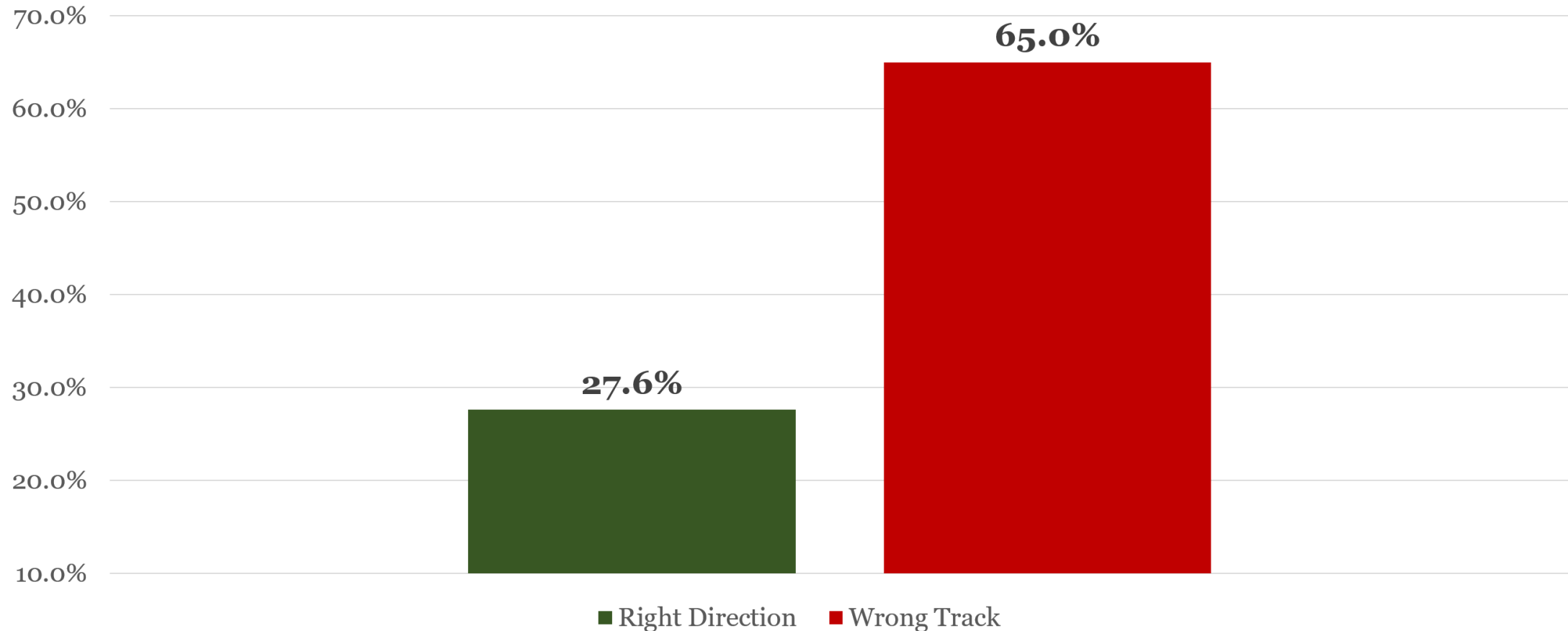
The Known Unknowns

“Known Unknowns”

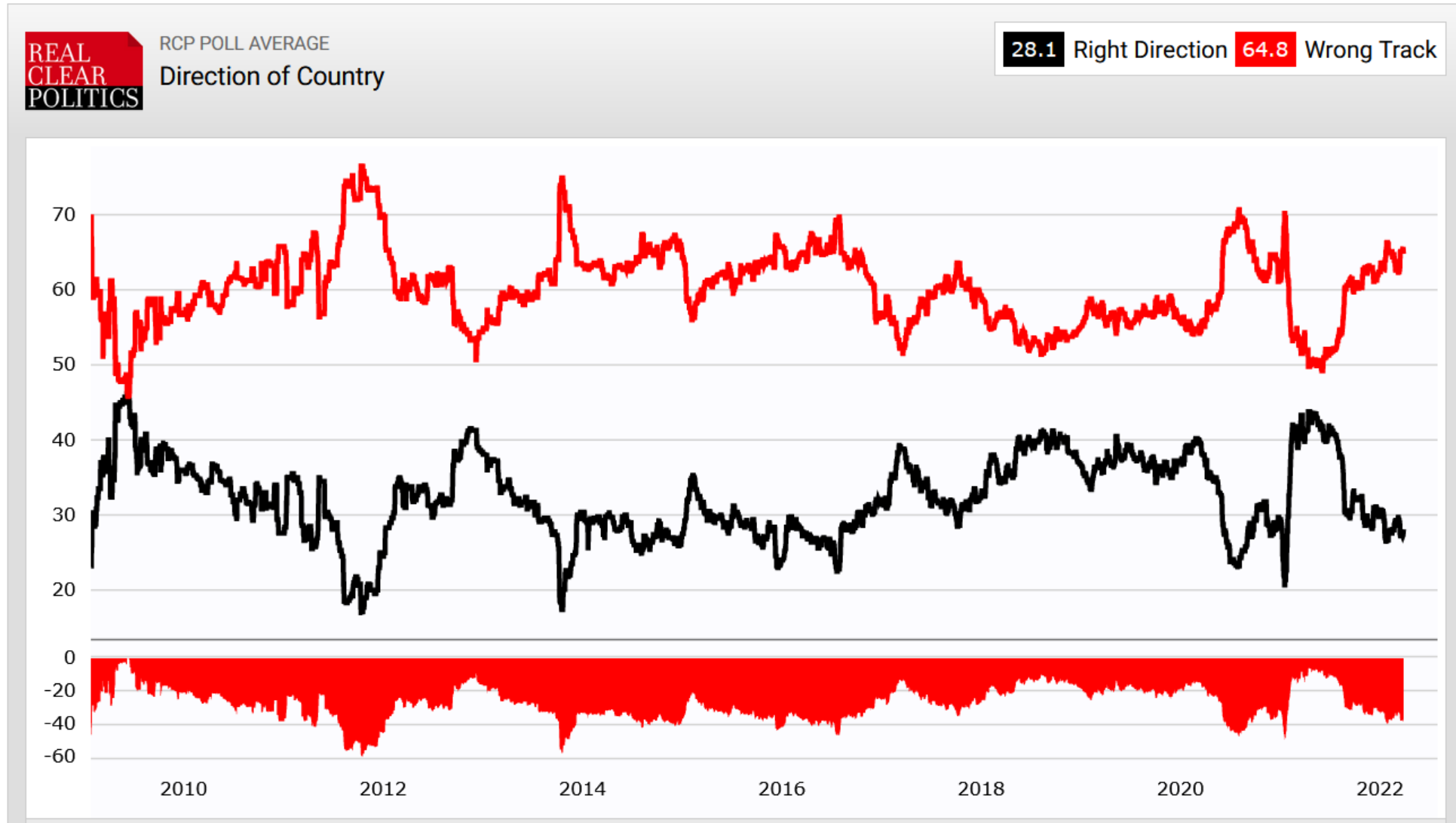
- **Candidates/Nominees . . . and Trump**
- **Changing Voter Opinion . . . and Trust/Rage**

Right Direction/Wrong Track

Do you think the country is going in the right direction, or is it on the wrong track?



Majority of Americans Has Thought Wrong Track Since 2009



Source: RCP

Public Anger/Attitudes/Reassessment

- **Truckers Protest: Canada vs. U.S.**
- **The Great Resignation/Sabbatical**
- **Consumer/Business Consequences/Opportunities**
- **Communication Silos/Foreign and Domestic Disinformation**

“Known Unknowns”

- Candidates/Nominees . . . and Trump
- Changing Voter Opinion . . . and Trust/Rage
- **COVID**
- **Economic Crises**
 - **Jobs/Hiring**
 - **Supply Chain**
 - **Housing**
 - **Inflation/Real Wages/Purchasing Power**

“Known Unknowns”

- **Immigration Issues**
- **Schools**
- **Critical Race Theory/Monuments/Re-naming**
- **Natural Disasters**
- **International Disasters**
- **War in Ukraine and Its Consequences**
- **Russia/China During War/Post-War**



IV. What We Really Don't Know

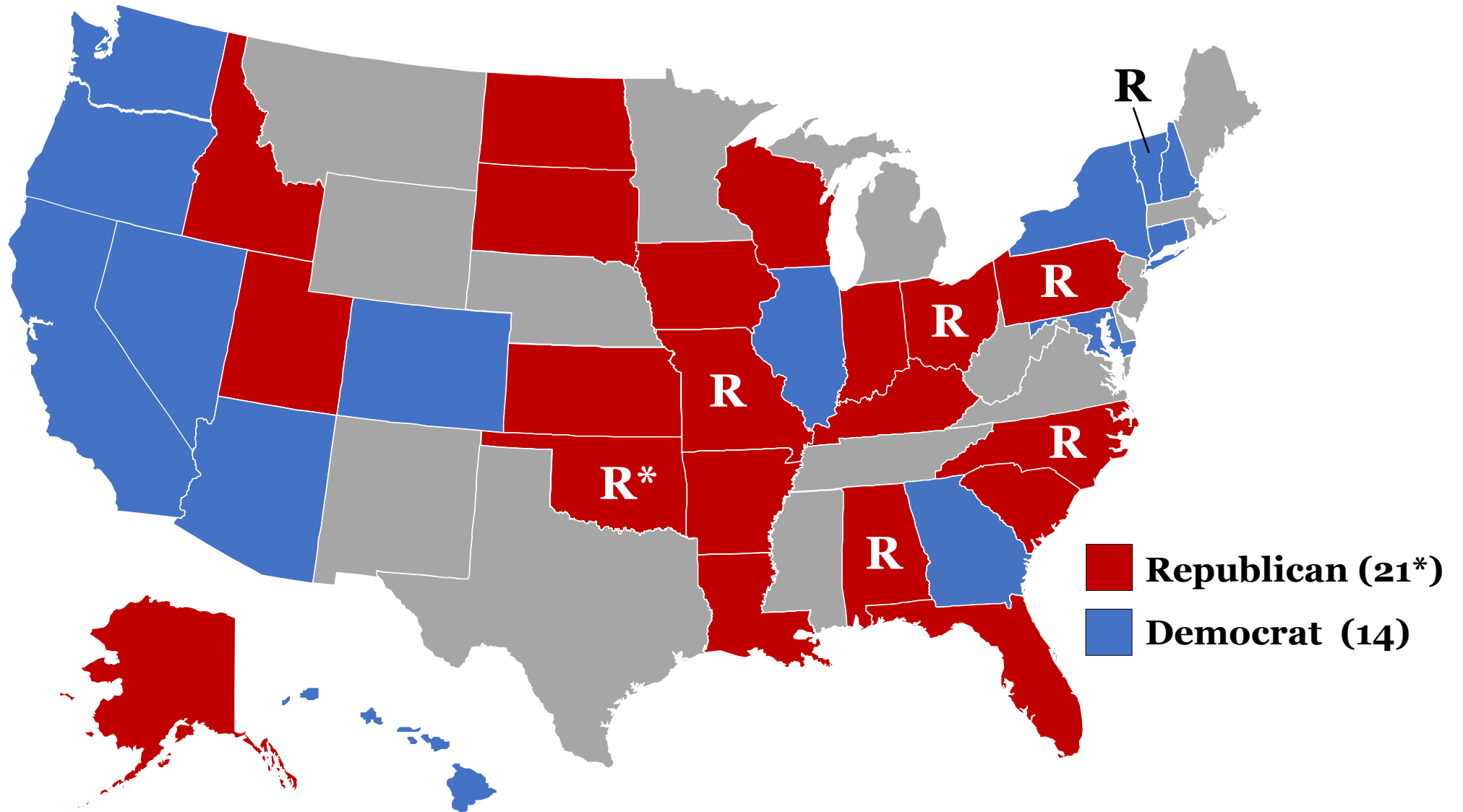
The Unknown Unknowns



V. What We Think Will Happen

Gazing Into the Crystal Ball

U.S. Senate Elections in 2022

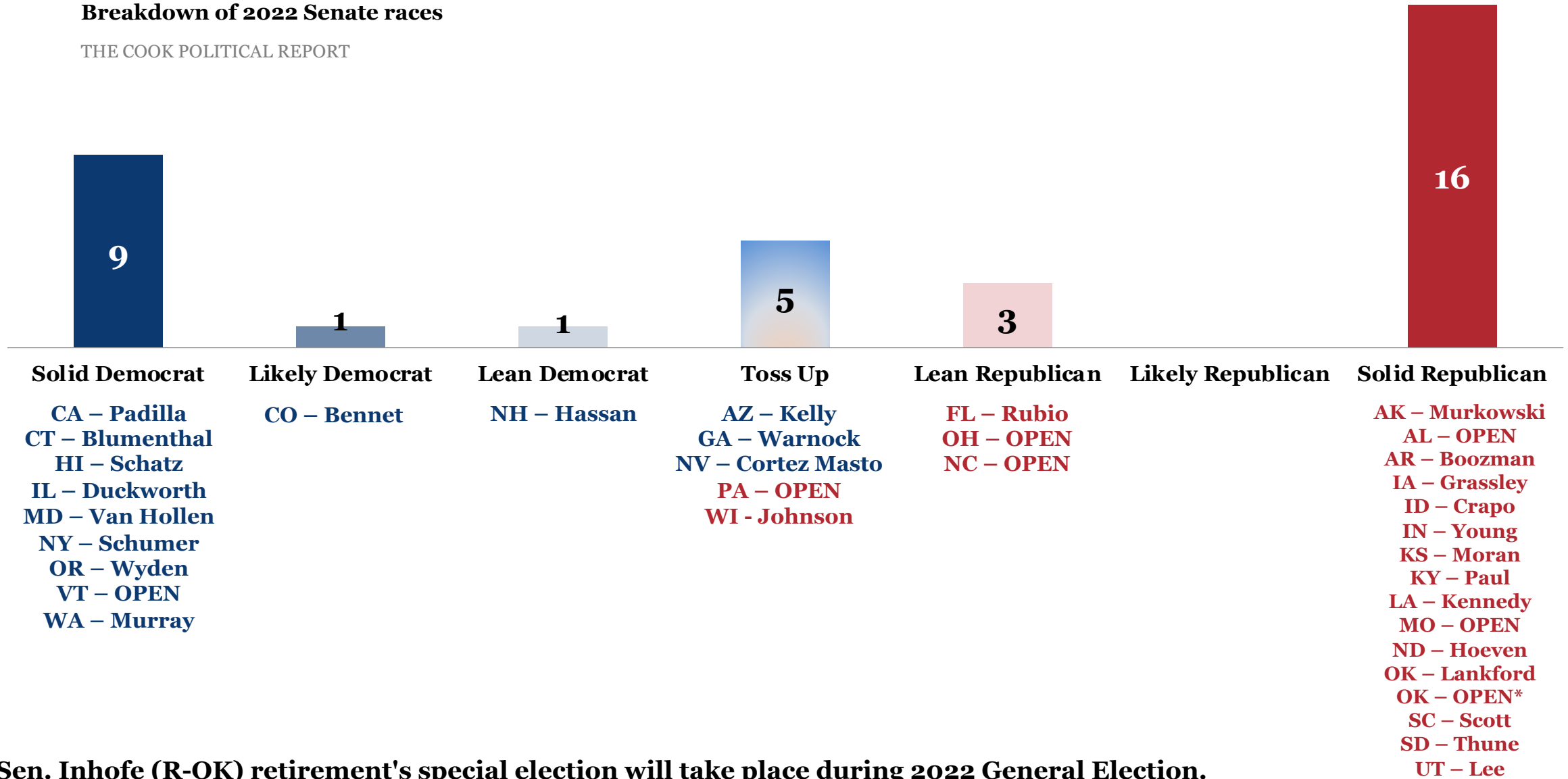


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Senate Races – Charlie Cook's Predictions

Breakdown of 2022 Senate races

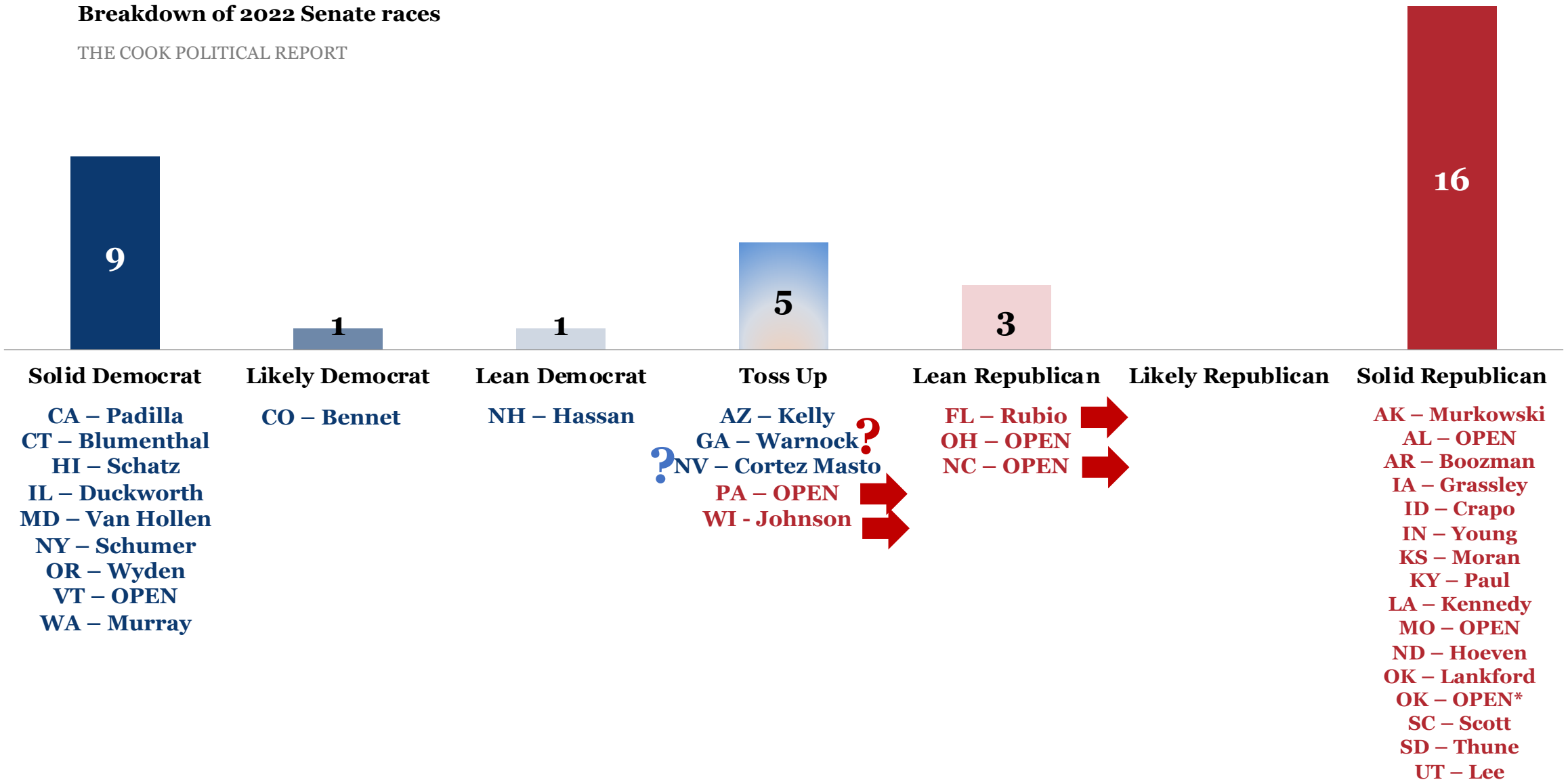
THE COOK POLITICAL REPORT



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Senate Races – Hawthorn’s View of Charlie Cook’s Predictions

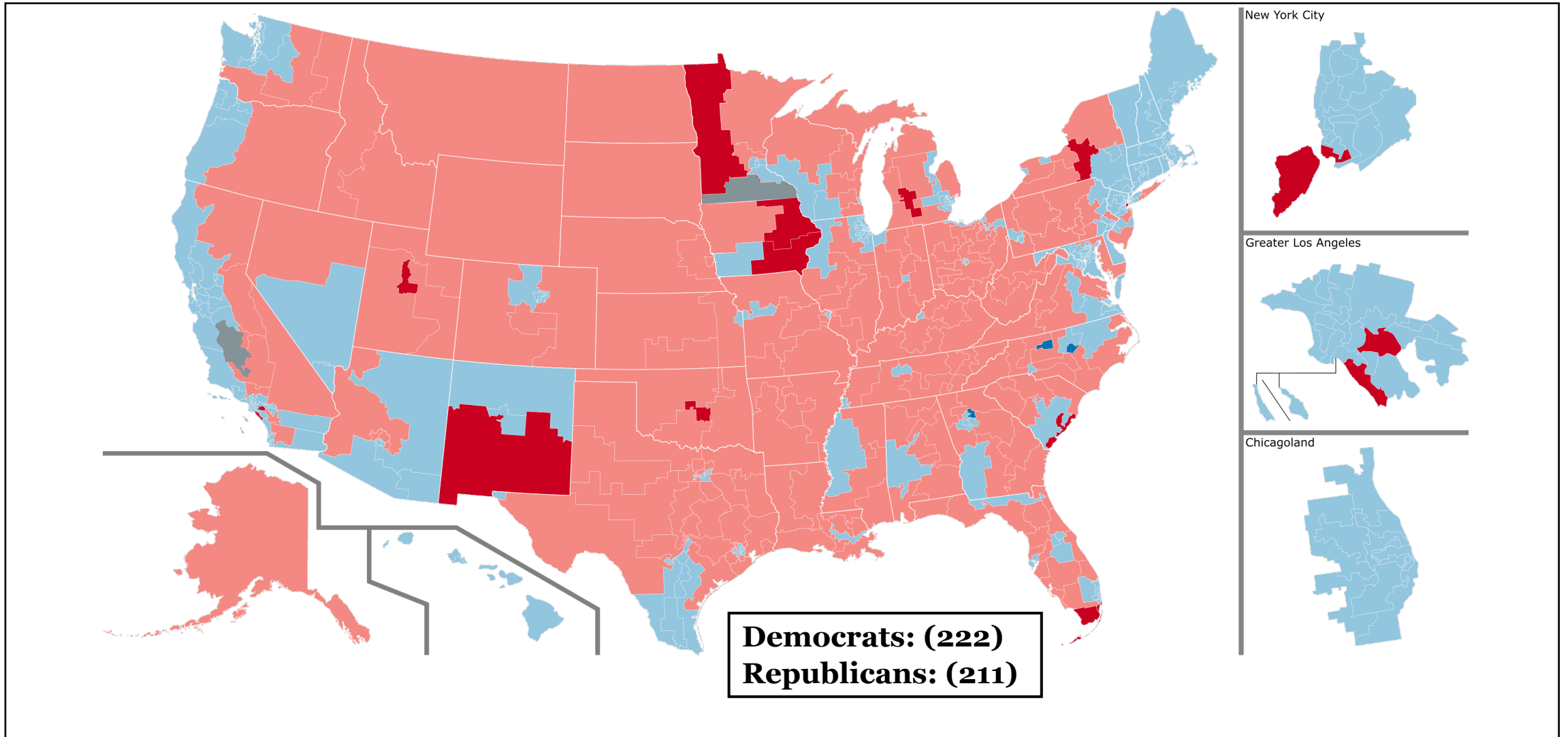
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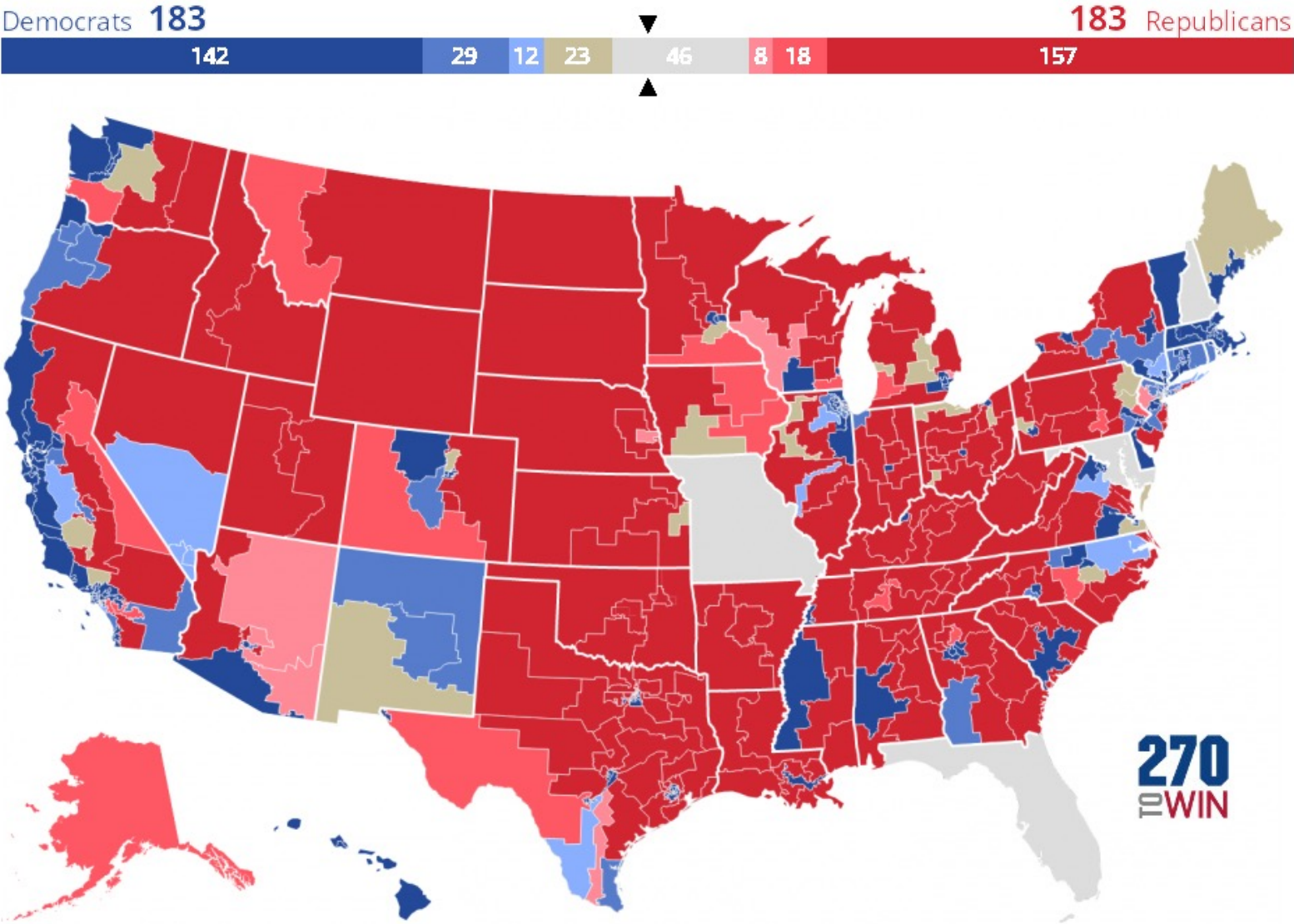
Too Close to Call
*(Georgia will decide,
unless there is a GOP wave)*

Current US House

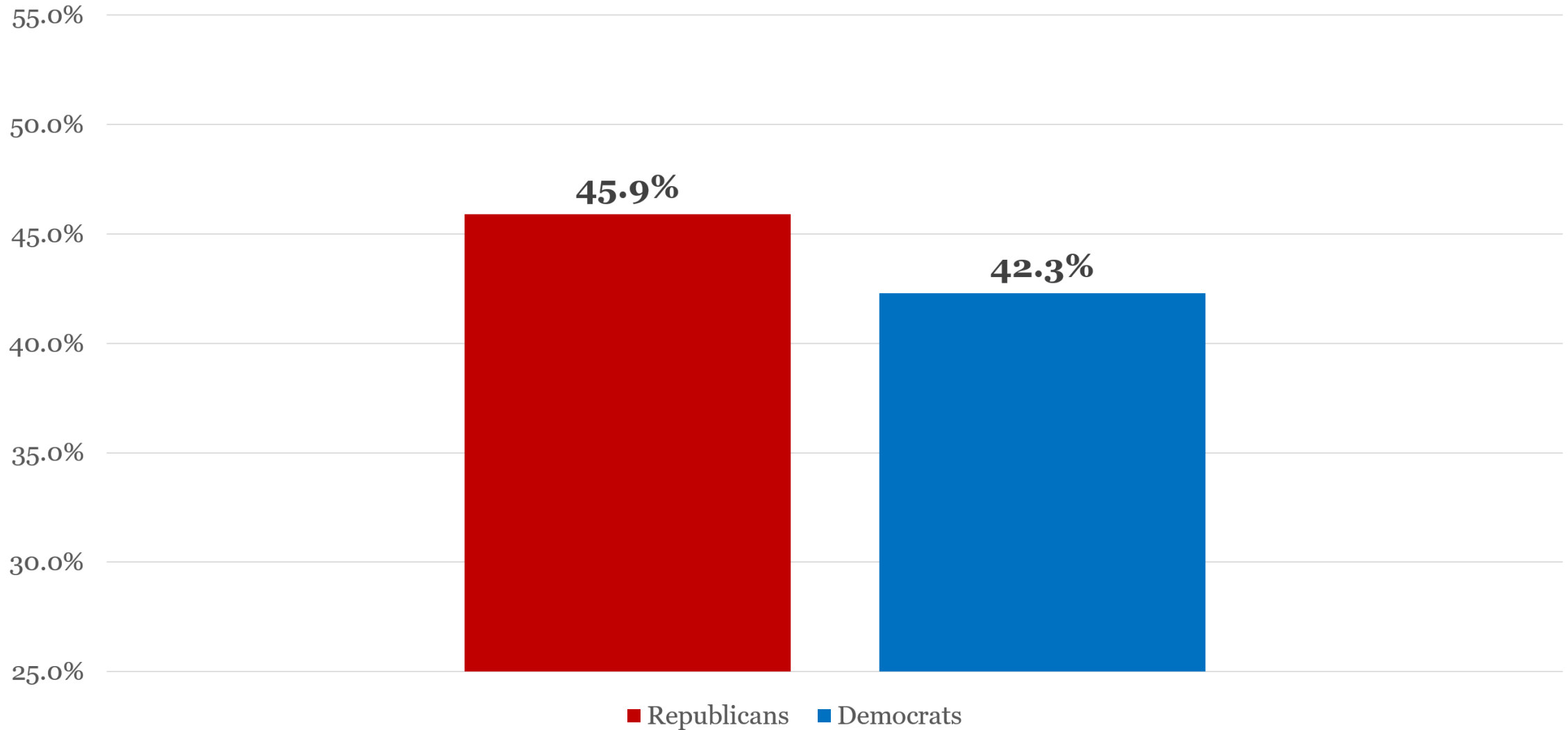
Darker districts flipped in the 2020 General Election (3 Vacancies – CA-22, MN-01 & NE-01)



2022 House Map of Competitiveness



Generic Ballot Preference – 2022 Congressional: GOP +3.6

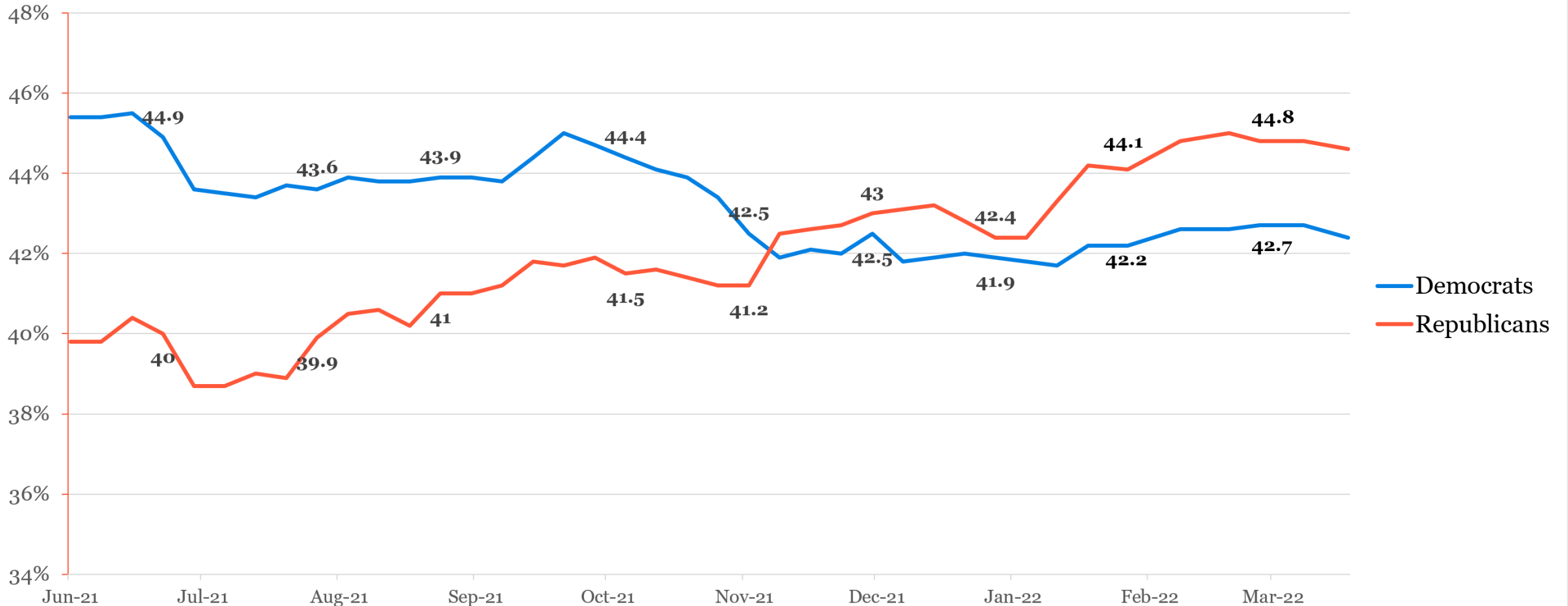


Source: RCP Average 2/3/22 - 3/29/22

Voters are deeply divided on which party should control the House

Generic Ballot Preference: Would you want to see the Republican Party or the Democratic Party win control of the US House of Representatives?

FIVETHIRTYEIGHT



House Races – Charlie Cook's Predictions

Democrat-held seat

Republican-held seat

Open seat – 18 open competitive seats

17 Dem, 1 GOP

AZ-4 Stanton
CA-9 Harder
CA-49 Levin
CO-7 *Open*
CT-5 Hayes
GA-2 Bishop
IL-11 Foster
IN-1 Mrvan
NC-1 *Open*
NC-6 Manning
NJ-5 Gottheimer
NM-3 Fernandez
NY-3 *Open*
NY-19 Delgado
OR-4 *Open*
OR-6 New Seat
Tx-34 Gonzalez
NY-22 *Open*

Likely Democrat

11 Dem, 3 GOP

CA-13 *Open*
CA-47 Porter
IL-6 Casten/Newman
IL-14 Underwood
NV-1 Titus
NV-3 Lee
NV-4 Horsford
NY-18 Maloney
OR-5 Schrader
RI-2 *Open*
VA-7 Spanberger
IL-13 New Seat
NY-1 *Open*
NY-11 Malliotakis

Lean Democrat

15 Dem, 8 GOP

IA-3 Axne
IL-17 *Open*
KS-3 Davids
ME-2 Golden
MI-7 Slotkin
MI-8 Kildee
MN-2 Craig
OH-9 Kaptur
OH-13 *Open*
PA-7 Wild
PA-8 Cartwright
PA-17 *Open*
TX –28 Cuellar
VA-2 Luria
WA-8 Schrier
CA-22 Valadao
CA-27 Garcia
CA-45 Park Steel
CO-8 New Seat
MI-3 Meijer
NC-13 *Open*
NM-2 Herrell
OH-1 Chabot

Toss Up

5 Dem, 1 GOP

AZ-1 Schweikert
AZ-6 *Open*
MI-10 *Open*
NJ-7 Malinowski
TX-15 *Open*
WI-03 *Open*

Lean Republican

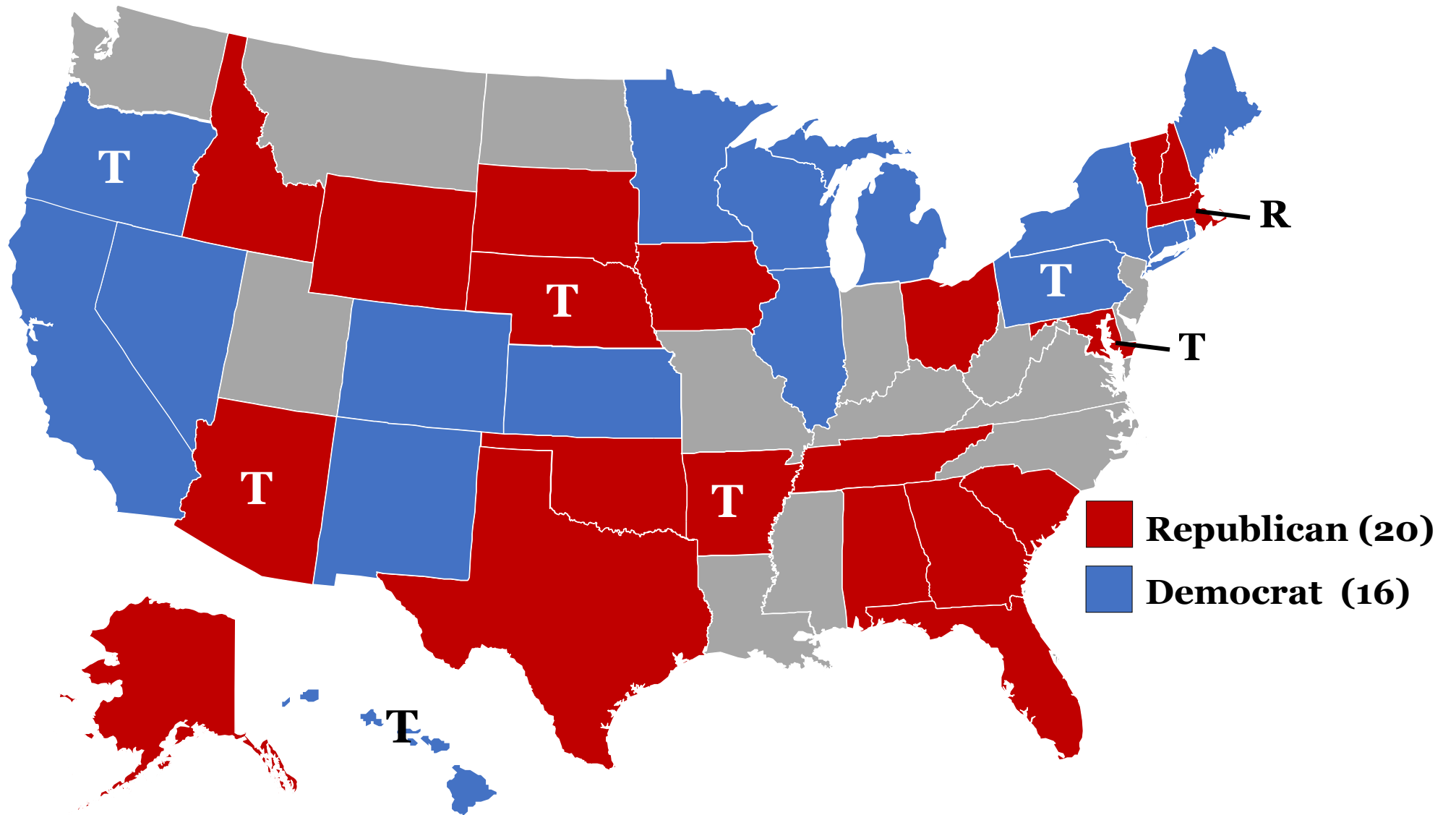
1 Dem, 10 GOP

CA-3 *Open*
CA-40 Kim
CA-41 Calvert
IA-1 Miller-Meeks
IA-2 Hinson
MN-1 *Vacant*
MT-1 *New Seat*
NE-2 Bacon
PA-1 Fitzpatrick
PA-10 Perry
AZ-2 O'Halleran

Likely Republican

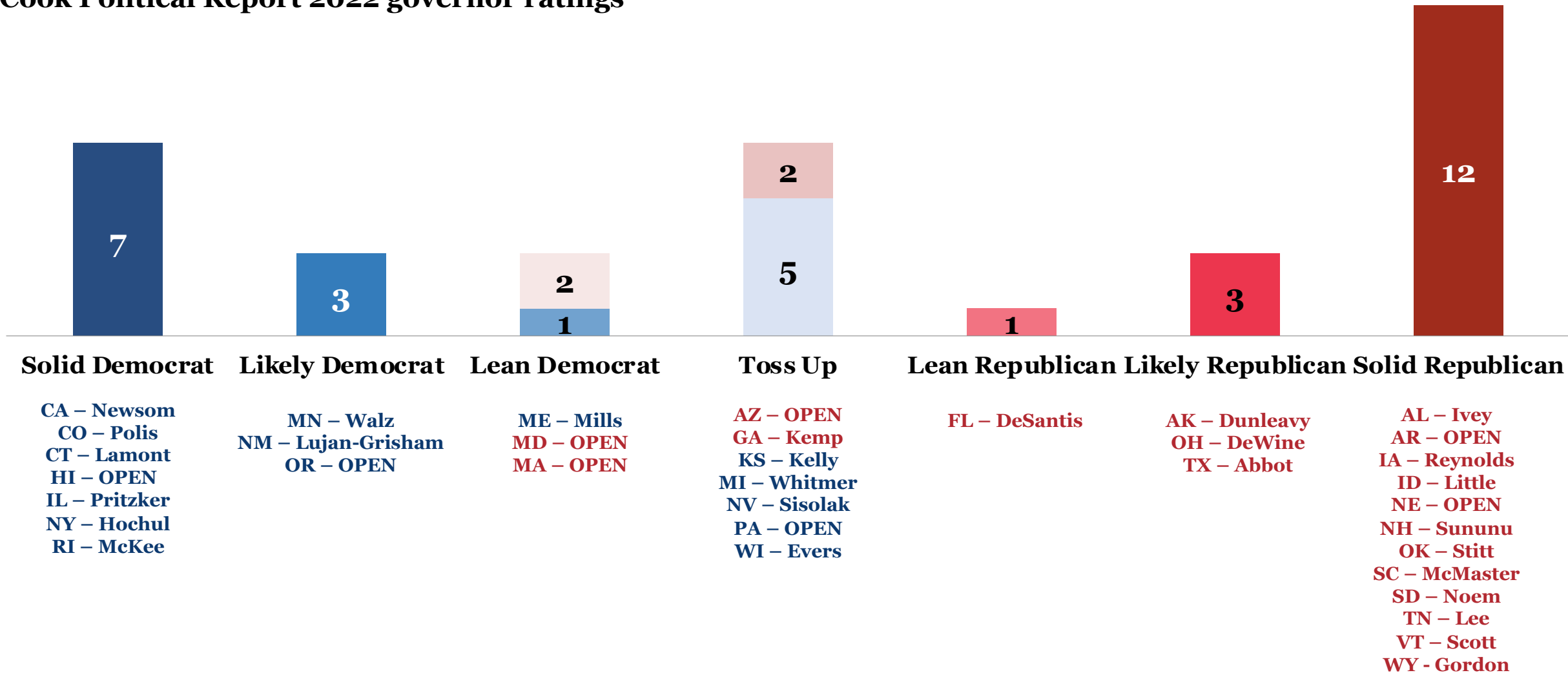
GOP Majority

U.S. Gubernatorial Elections in 2022



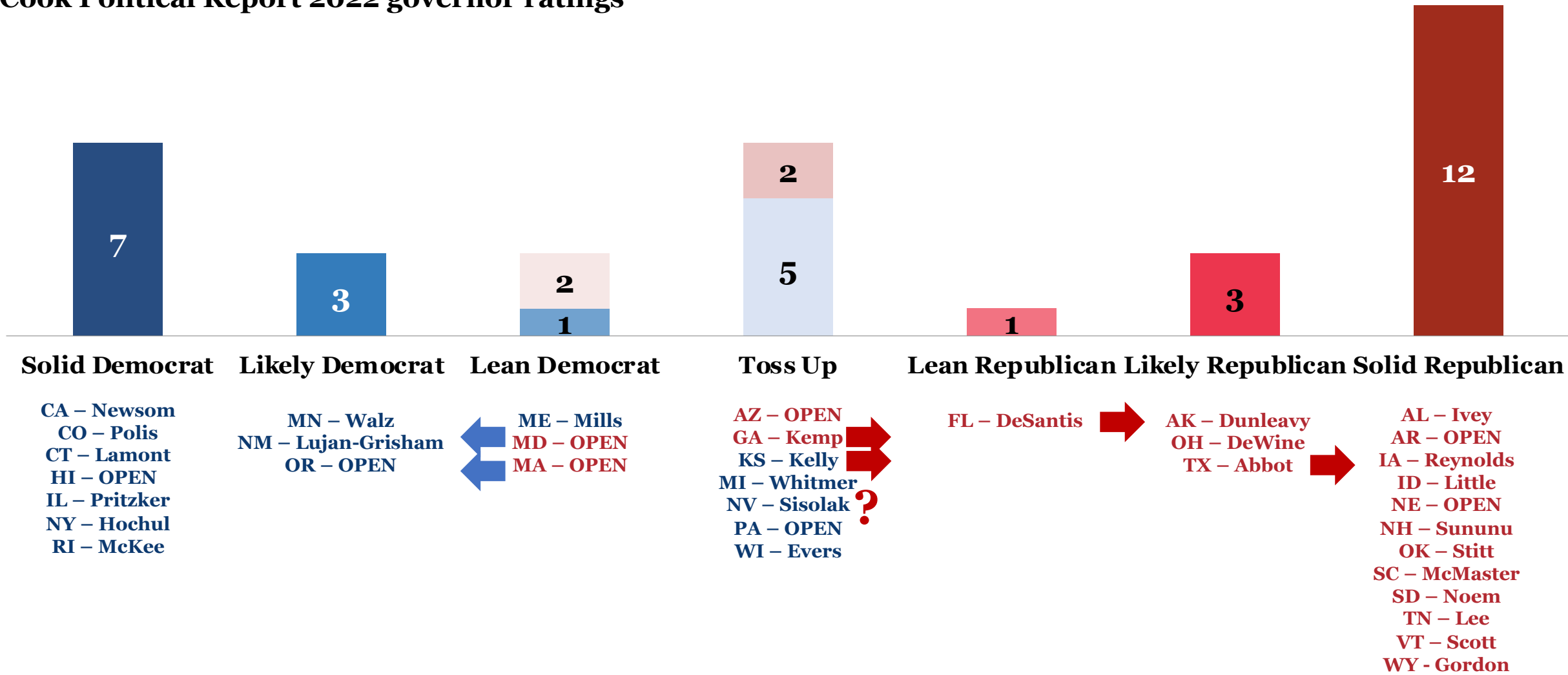
Cook Governor Predictions

Cook Political Report 2022 governor ratings



Cook Governor Predictions – Hawthorn’s View

Cook Political Report 2022 governor ratings



No Net Partisan Change

(Depending on Georgia)

Takeaways

- **GOP Majority in Congress: Congress stalls**
- **Politicians playing to increasingly extreme points of view**
- **Charlie Cook: UCLA poll**

“60 percent of Democrats and 63 percent of Republicans would not want their son or daughter to marry someone from the opposite party.”

“Now we are in an era of ping-pong policy development, bouncing back and forth, from left to right, repeating endlessly. That will not change until the moderates decide they want to take back their parties, pulling back the center right and the Democrats to the center left.”

- **Lack of public trust could spell trouble for a host of industries**



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