



A visit with

The Hawthorn Group

May 16th, 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
... and The Unknown Unknowns
- IV. What We Think Will Happen**
- V. What Voters Are Seeing**
- VI. Your Questions and Comments**

Setting the Stage

**Political volatility has become commonplace
in a nation as deeply and closely divided
as America is today.**

**Seven of the last eight elections qualify as change elections.
 $\frac{3}{4}$ a shift in the balance in some important way.**

**And if Republicans were to capture
the House and Senate in November,
Biden would be the fifth consecutive president
to see his party lose both chambers of Congress
on his watch.**

**Dan Balz & Marianna Sotomayor
THE WASHINGTON POST
May 16th, 2022**

The background features a stylized American flag with blue, white, and red wavy stripes and stars. The stars are white and blue, and the stripes are red and white. The overall design is modern and abstract.

I. What's In Play in 2022

What's in Play in 2022

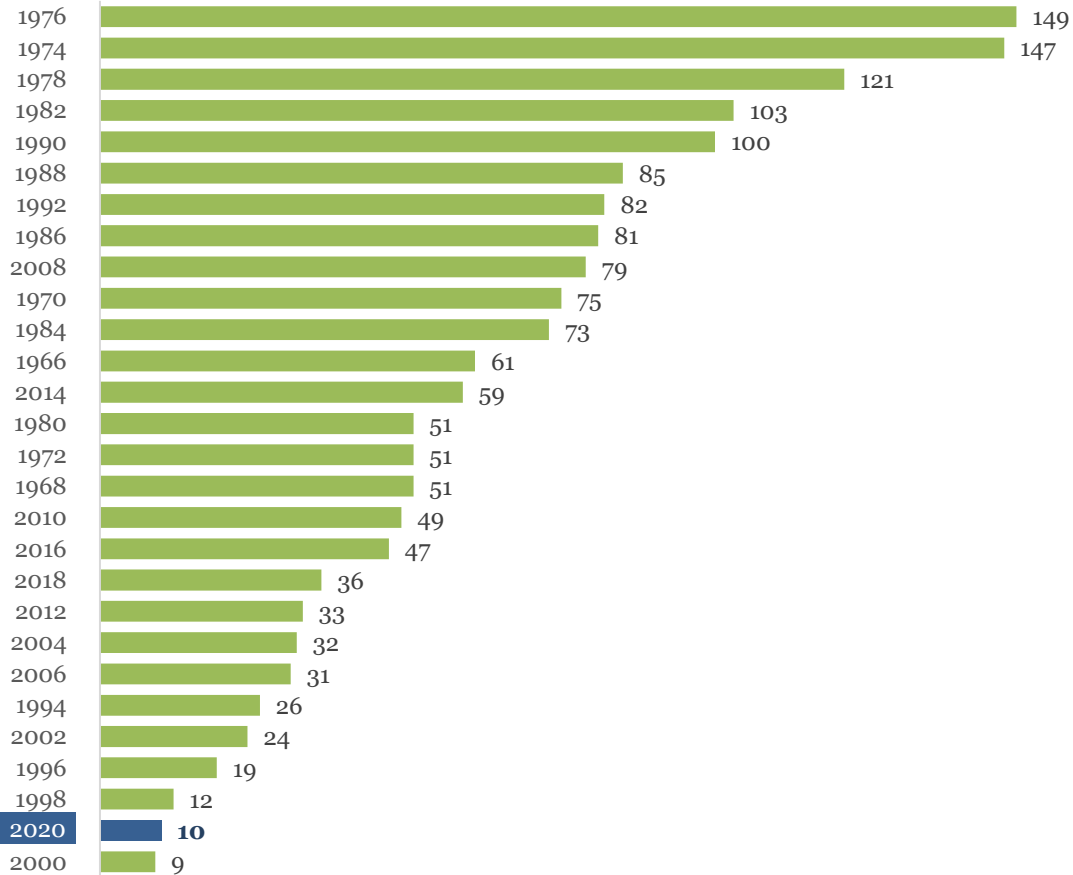
- **35* U.S. Senate Seats** – Currently **50D** – **50R**
 - **14D** vs. **21R*** (Retiring **1D** vs. **6R***)
- **435 U.S. House** – Currently **221D** – **208R**- 6 Vacancies
 - **222D**-**213R** (Not Seeking Re-Election **31D** vs. **21R**)

* 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

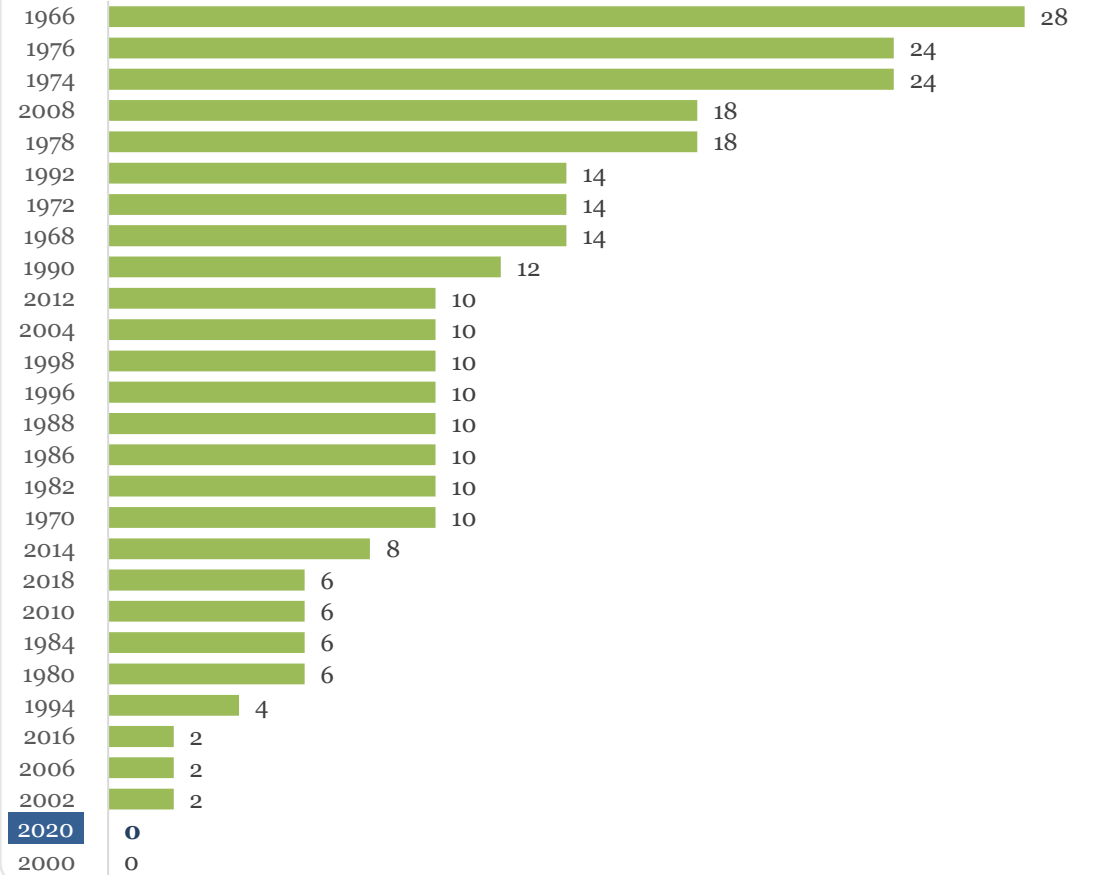
Size of the House majority since 1966

90TH-117TH CONGRESS



Size of the Senate majority since 1966

90TH-117TH 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**
- **91 statewide ballot measures** have been certified for the ballot in 33 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

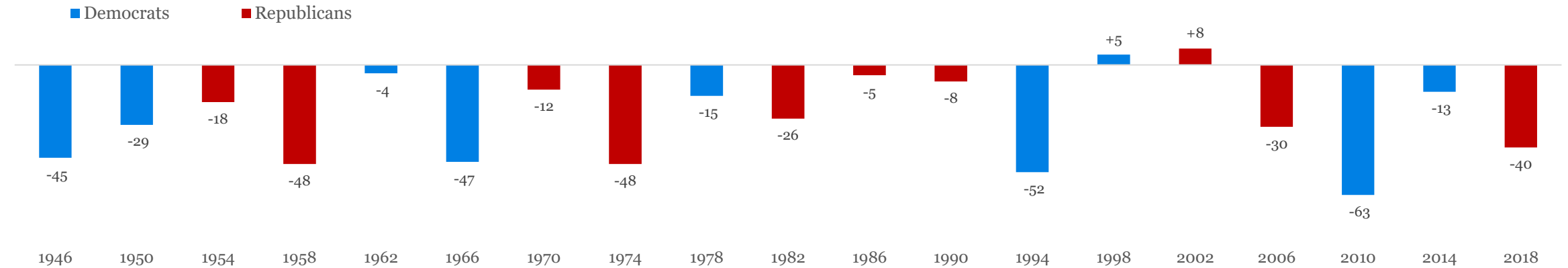
The (Sometimes Disputed)

Known Knowns

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

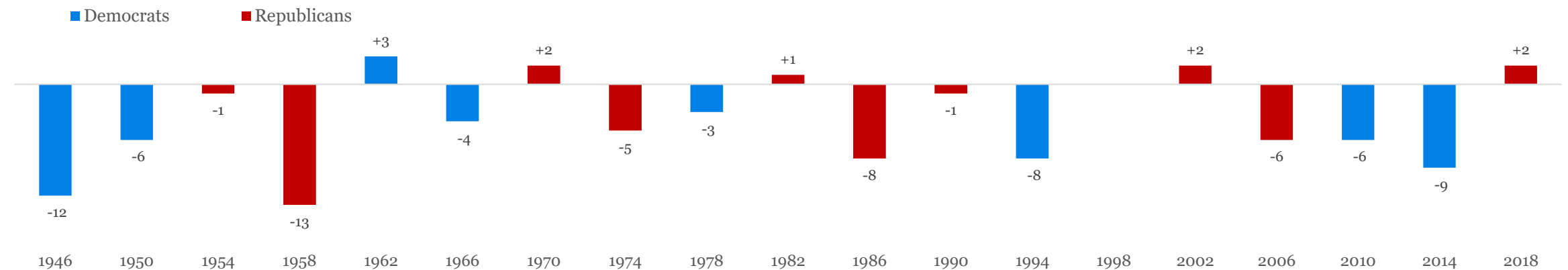
President's party gain/loss of seats in House

MIDTERM ELECTIONS, 1946-2018



President's party gain/loss of seats in Senate

MIDTERM ELECTIONS, 1946-2018

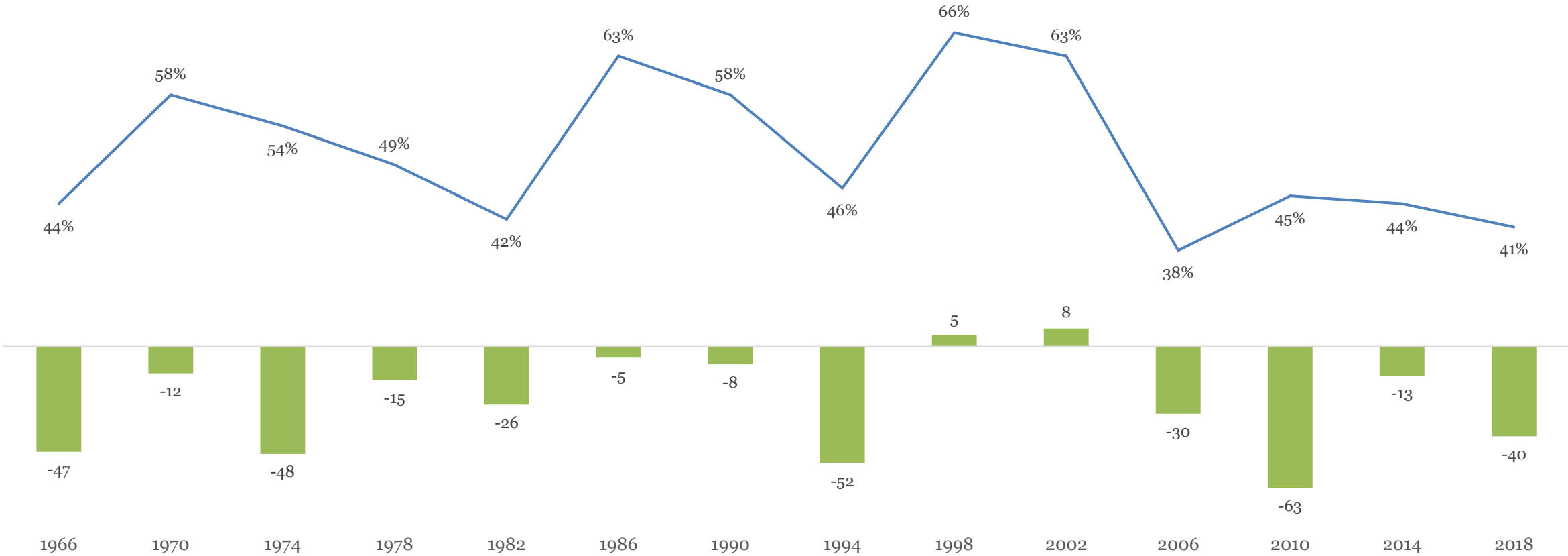


1 Presidents with a sub-50% approval rating lose an average of 36 House seats in the midterms

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

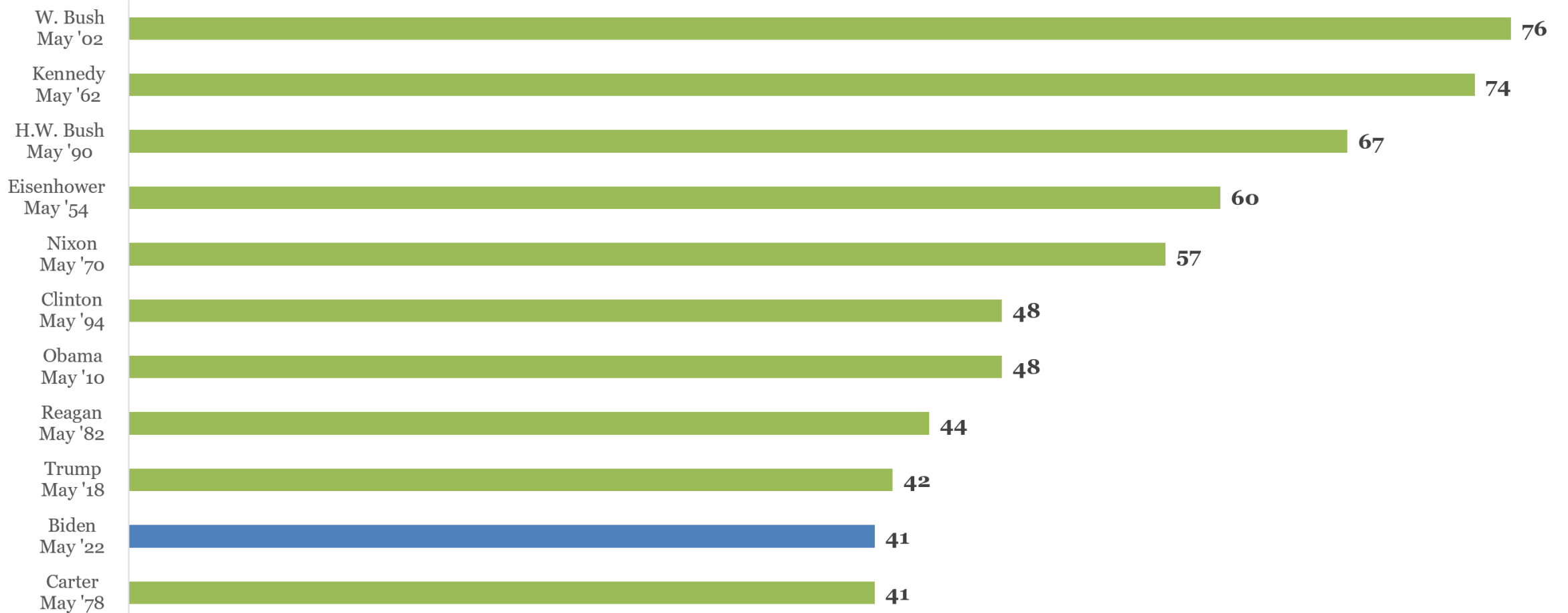


SOURCE: Gallup.

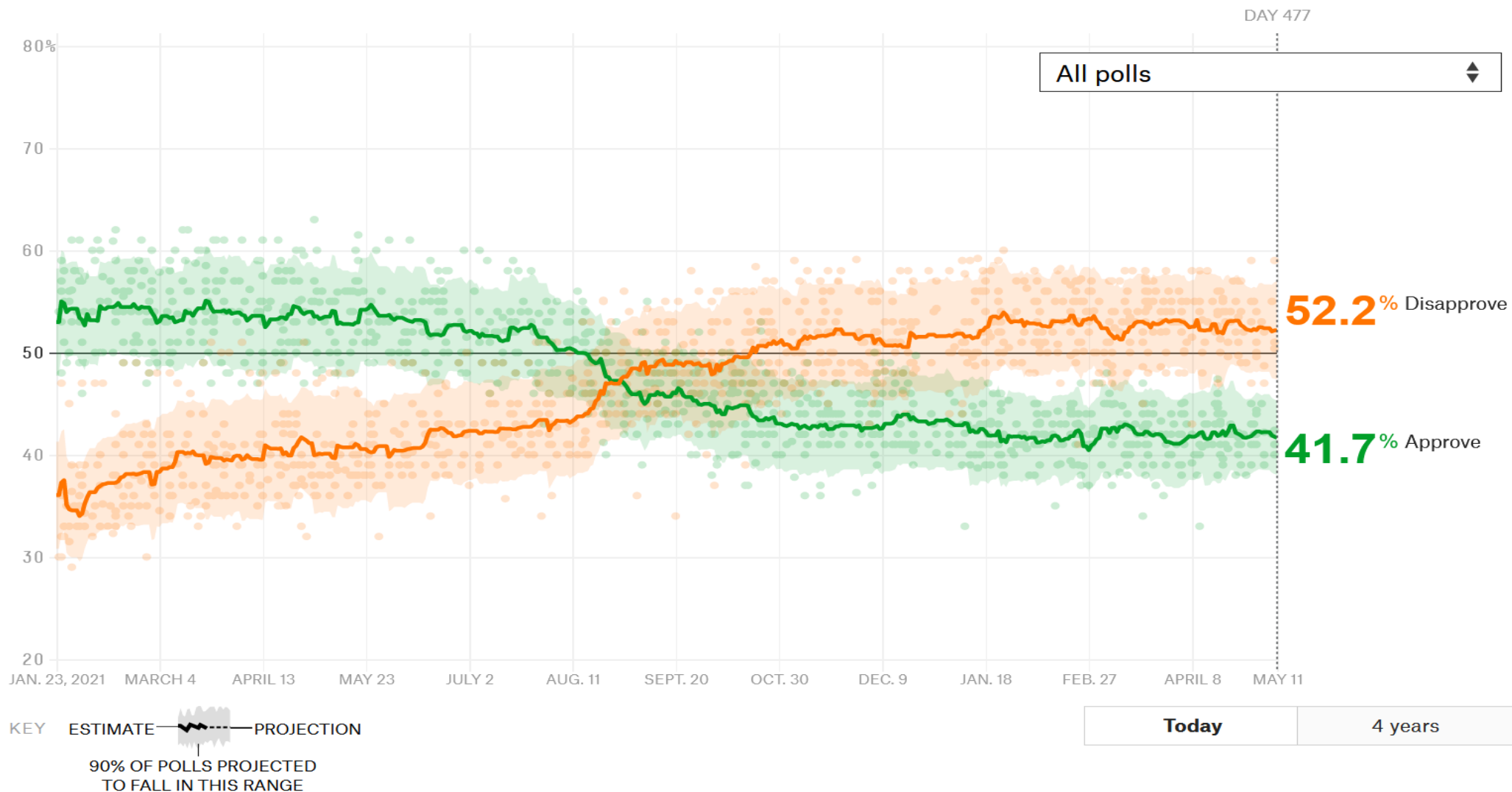
2 Biden's job approval rating is lower than those of most recent presidents at this point in their presidencies

Gallup comparative presidential approval ratings

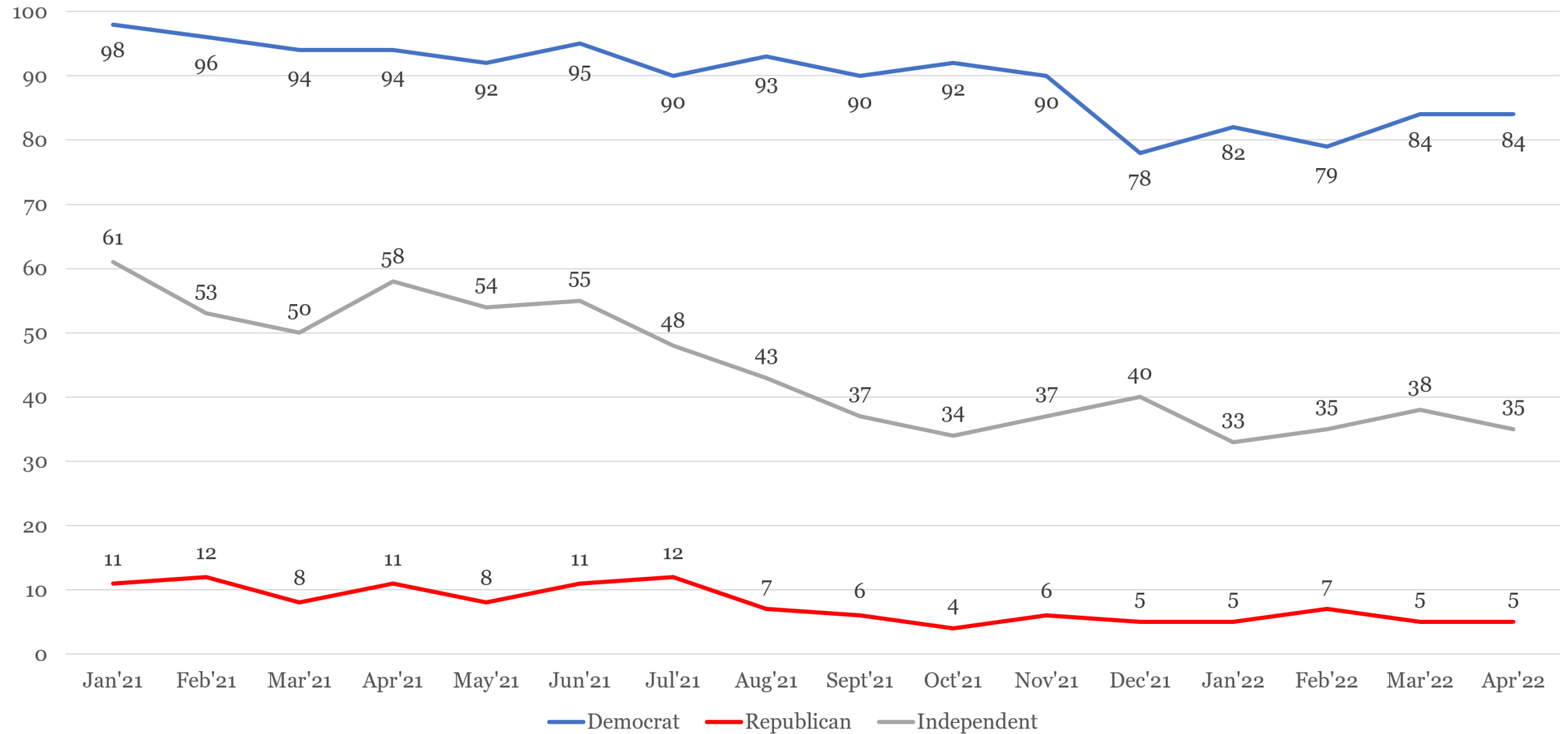
IN MAY OF EACH PRESIDENT'S SECOND YEAR



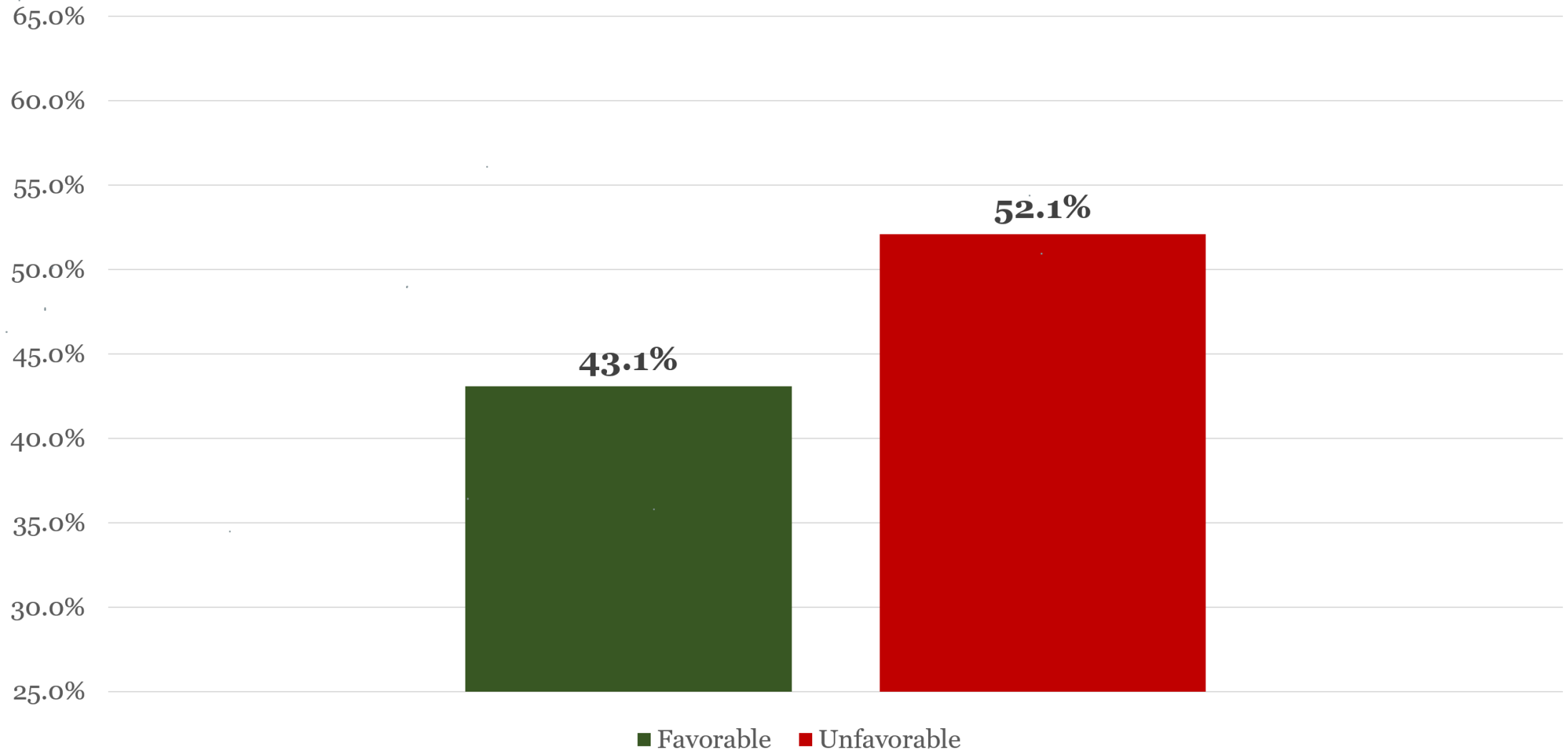
2 Biden Job Approval Since Inauguration



2 Biden Approval Since Inauguration by Party ID

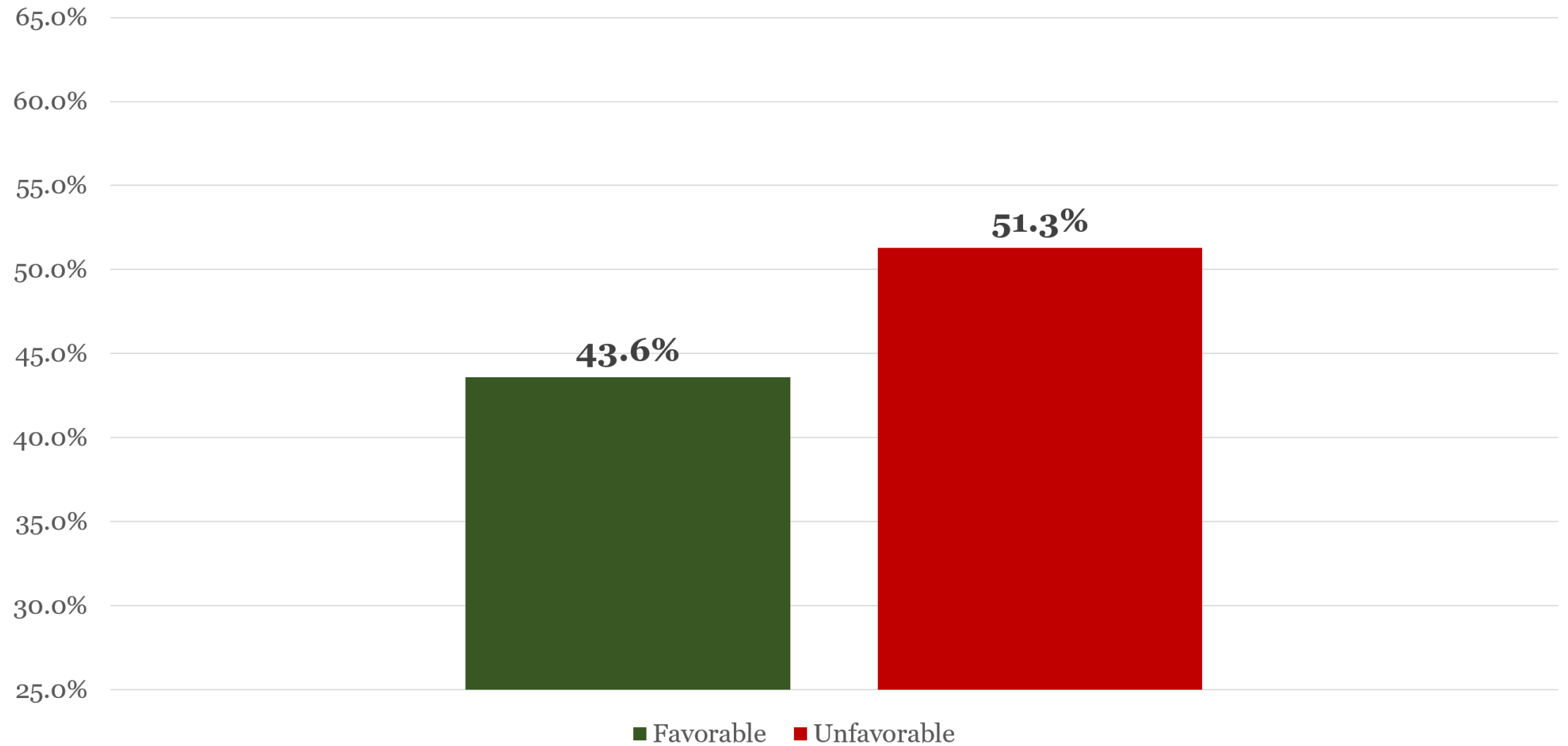


2 Biden Personal Favorability



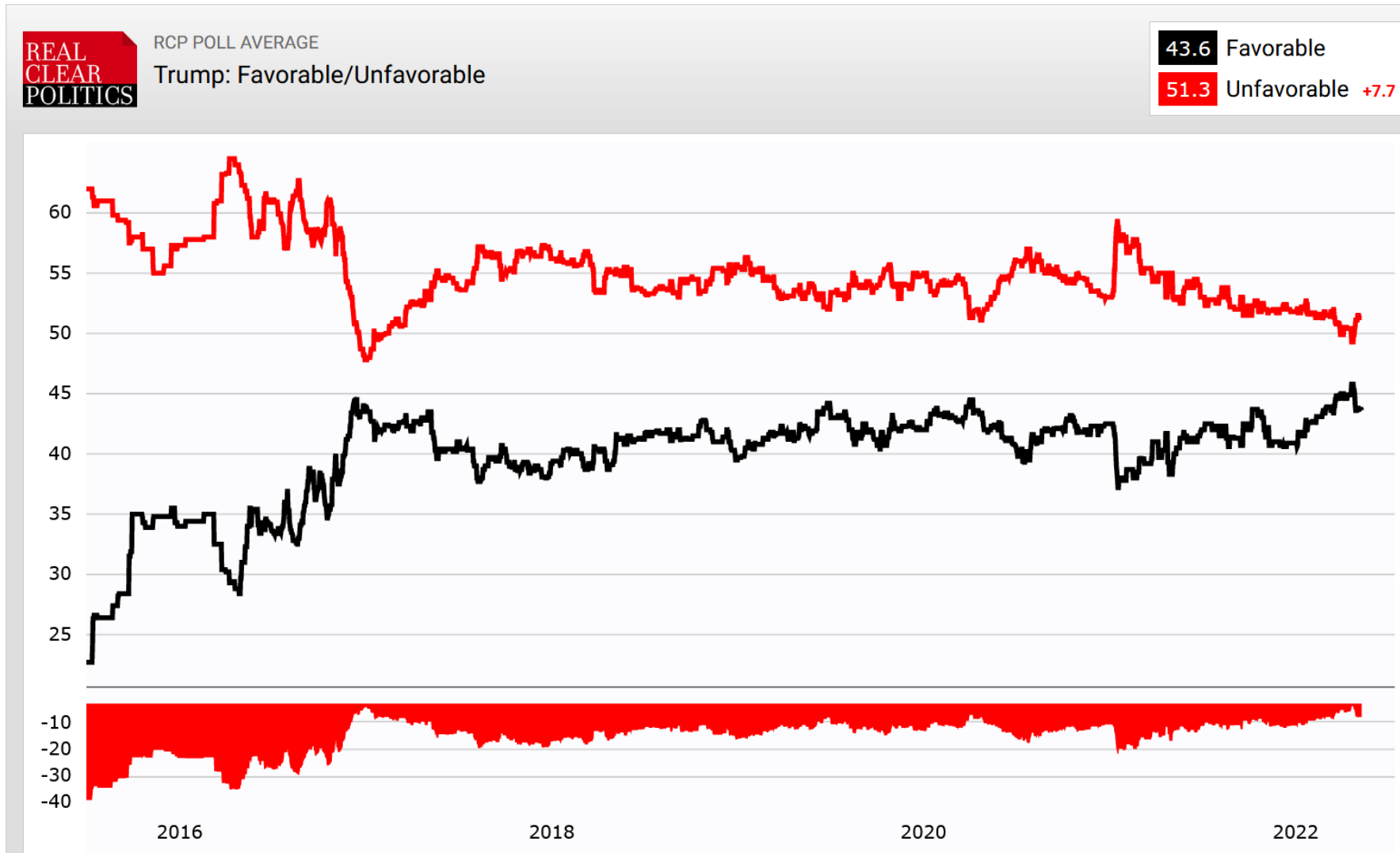
Source: RCP Average 3/2/22 - 5/10/22

2 Trump Personal Favorability



Source: RCP Average 4/10/22 - 5/10/22

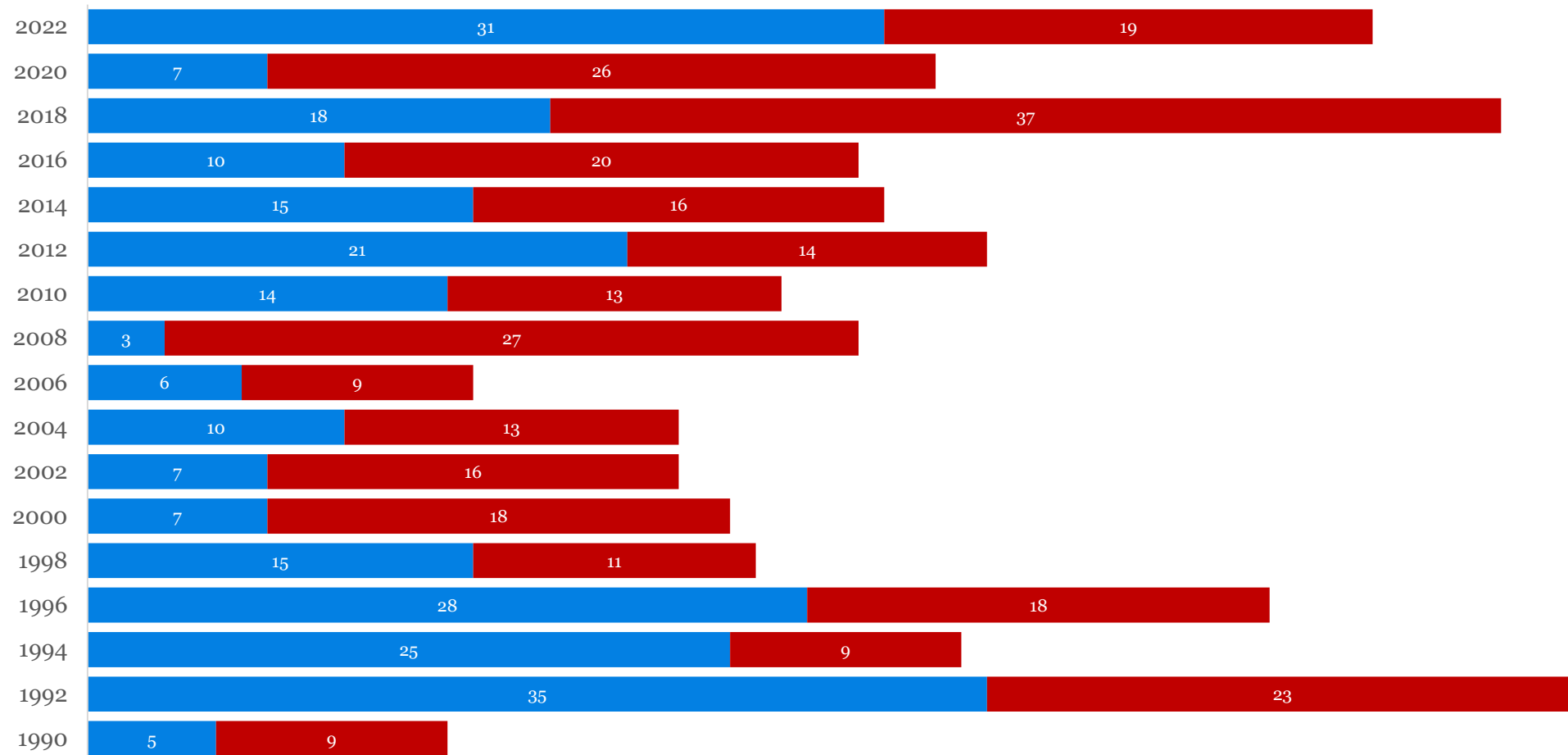
2 Trump Personal Favorability (Since 2015)



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



SOURCE FiveThirtyEight, Ballotpedia, Roll Call, Charlotte Observer, Politico, AP News, Texas Tribune, The Hill

4 Voter Enthusiasm is NOT Favorable to Democrats



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%	??

4 Voter Enthusiasm is NOT Favorable to Democrats



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%	

5 Recent Election Results

- **Virginia Governor**
- **Virginia Lt. Governor, Attorney General, State House**
- **New Jersey State Senate President**
- **San Francisco School Board**
- **Ohio Senate and West Virginia House GOP Primaries**

- **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

6 GOP Anxieties

- **Recruitment Failures**
- **Trump Vengeance**
- **Trump Challengers**
- ~~**Russia**~~ **Roe v. Wade**

7 Cash on Hand – March 31, 2022

Democratic National Committee	\$57.2 Million
Democratic Senatorial Campaign Committee	\$43.7M
Democratic Congressional Campaign Committee	\$113.2M
Republican National Committee	\$44.9M
National Republican Senatorial Committee	\$44.1M
National Republican Campaign Committee	\$94.7M
Trump's Save America PAC	\$112.5M



III. What We Don't Know
The Known Unknowns

“Known Unknowns”

- **Candidates/Nominees . . . and Trump**

The Power of a Trump Endorsement

- **Trump Endorsements**

- 130 endorsements in midterm races to date
- All 22* endorsed candidates in Indiana and Ohio came away with the Republican nomination.
 - *12 were incumbents with no opposition

- **Big Winners**

- **Mooney in WV (54.2%)**
- **J.D. Vance in OH (32.2%)**

- **Losers**

- **Herbster (NE Gov) still got 30.2% of the vote**

- **Other**

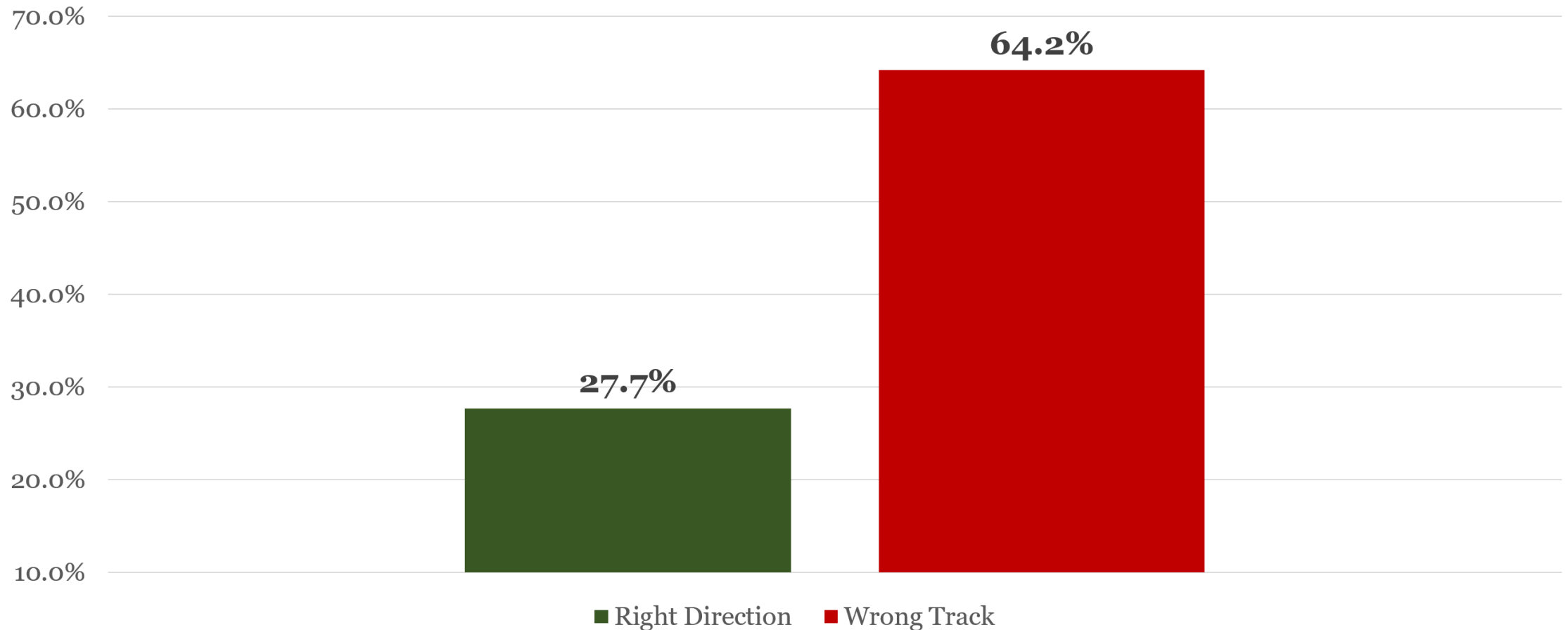
- **Lindstrom (NE Gov) a never Trumper got 25.8%***

“Known Unknowns”

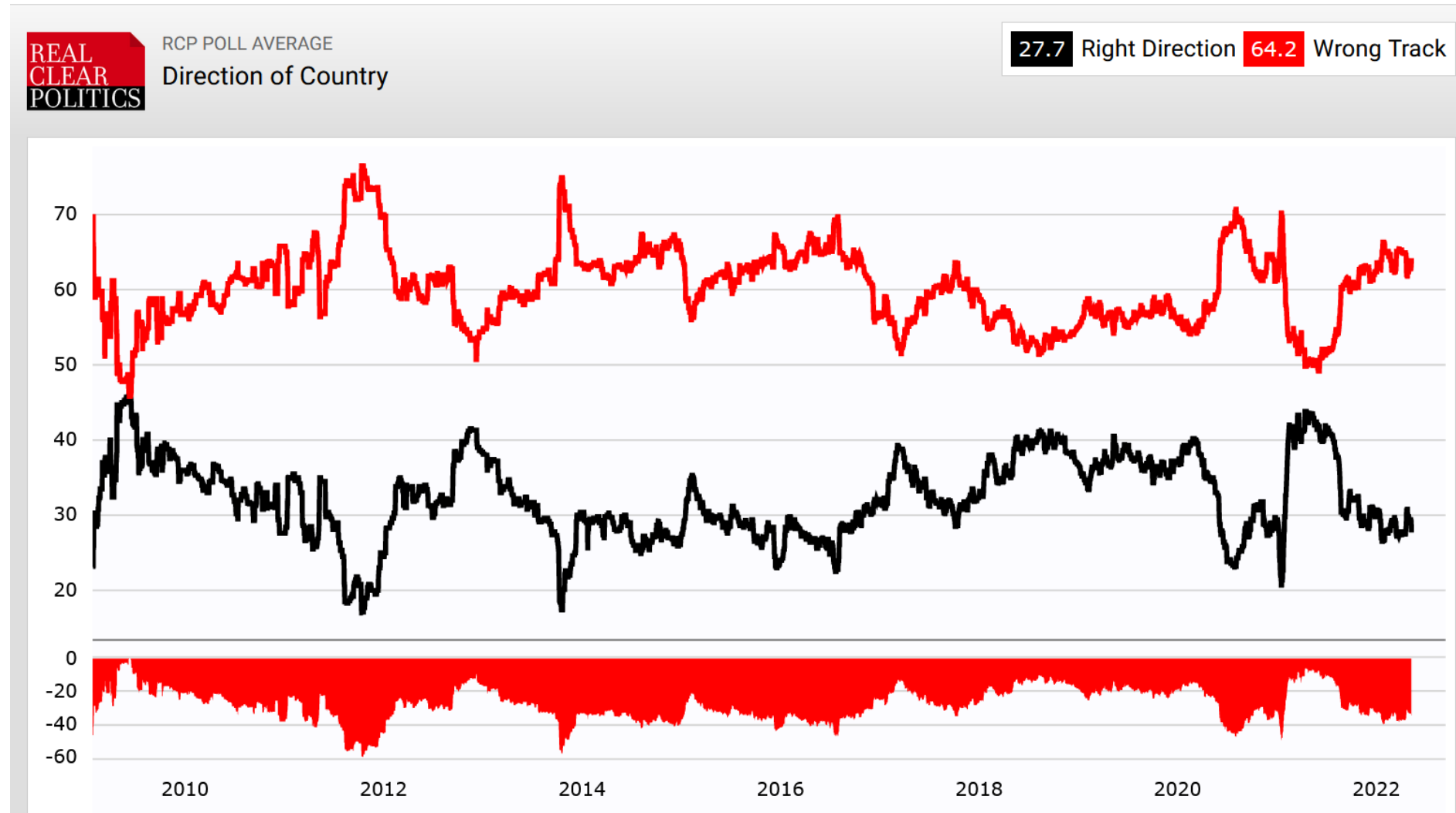
- **Candidates/Nominees . . . and Trump**
- **Changing Voter Opinion . . . and Trust/Rage**

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



“Known Unknowns”

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

Low Consumer Confidence

- University of Michigan Consumer Confidence Survey:
Lowest level in almost 11 years
 - (59.7 percent down from 84.9 percent in March 2021)
- A March Associated Press/NORC Poll:
 - **70 percent** of Americans think the economy is in poor shape,
- **81 percent** of those in a poll released by CNBC see a recession coming this year.
- Gallup: Share of Americans citing **inflation as the top issue** is now at its highest level since the 1980s.

Other “Known Unknowns”

- **Immigration Issues**
- **Schools**
- **Natural Disasters**
- **War in Ukraine and Its Consequences**
- **Russia/China During War/Post-War**

A NEW “Known Unknown”

... and the GOP pro-populist, anti-corporate shift

- **Disney**
- **FPL Veto**
- **Musk Twitter Takeover**
- **Carhartt Customer Revolt**
- **Increased NIMBY Support**

A NEW “Known Unknown”

... and the GOP pro-populist, anti-corporate shift

- **Disney**
- **FPL Veto**
- **Musk Twitter Takeover**
- **Carhartt Customer Revolt**
- **Increased NIMBY Support**

For business, there is no longer a GOP firewall!

The “midterm” environment offers challenges ... and opportunities

- **Political polarization, extremism, lack of trust:** More contentious issues will play out in public.
- **Public opinion matters:** Even when federal and state approvals are required, local support – and opposition – can be definitive.
- **Public engagement is a vital business strategy for managing risk.**

What We REALLY Don't Know

The Unknown Unknowns

The background features a stylized American flag motif. It consists of flowing, semi-transparent bands of red and white, with blue areas containing white stars. The overall effect is dynamic and patriotic.

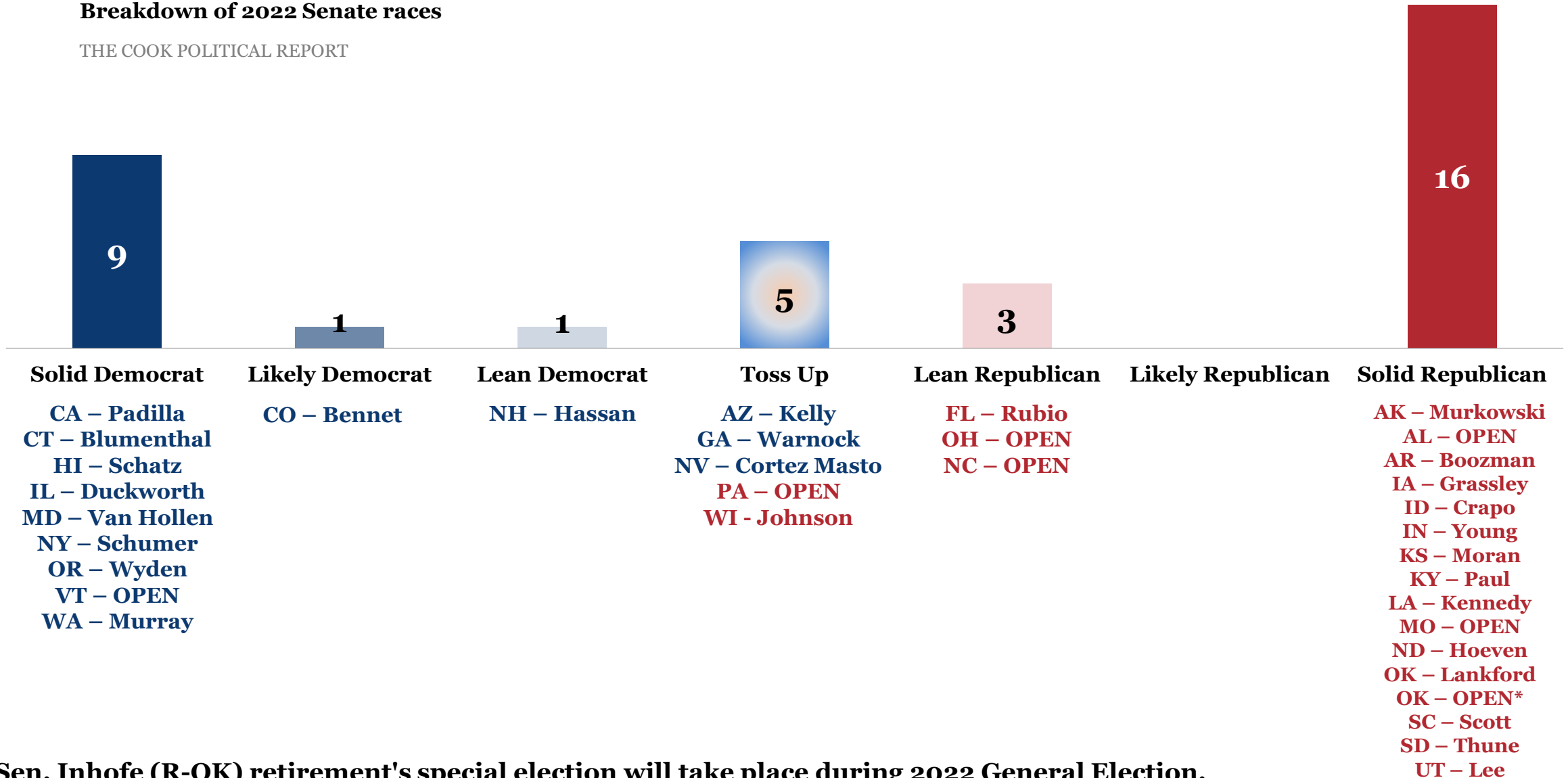
IV. What We Think Will Happen

Gazing Into the Crystal Ball

Senate Races – Cook Report Predictions

Breakdown of 2022 Senate races

THE COOK POLITICAL REPORT

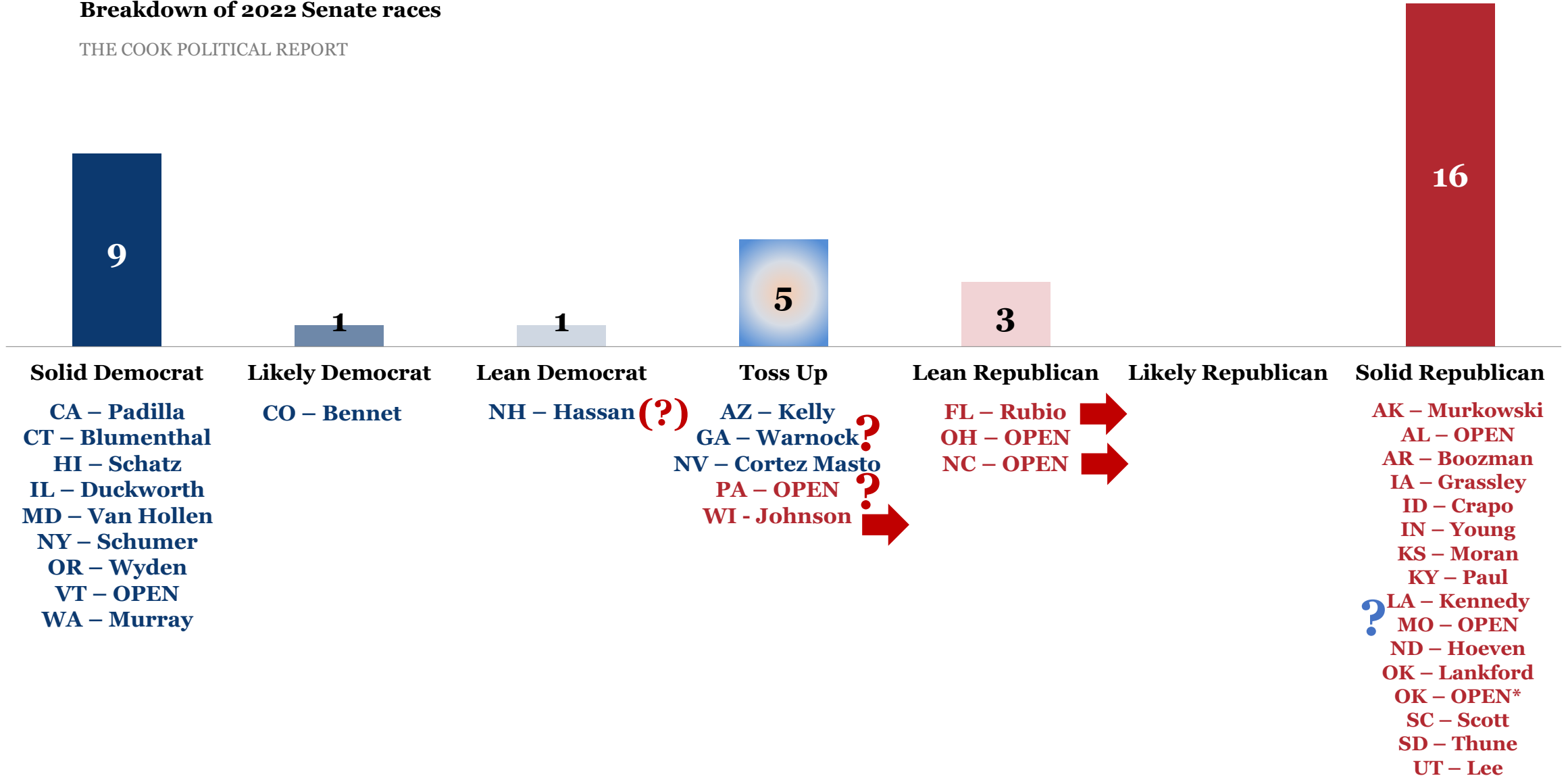


* Sen. Inhofe (R-OK) retirement's special election will take place during 2022 General Election.

Senate Races – Hawthorn’s View of Cook Report Predictions

Breakdown of 2022 Senate races

THE COOK POLITICAL REPORT

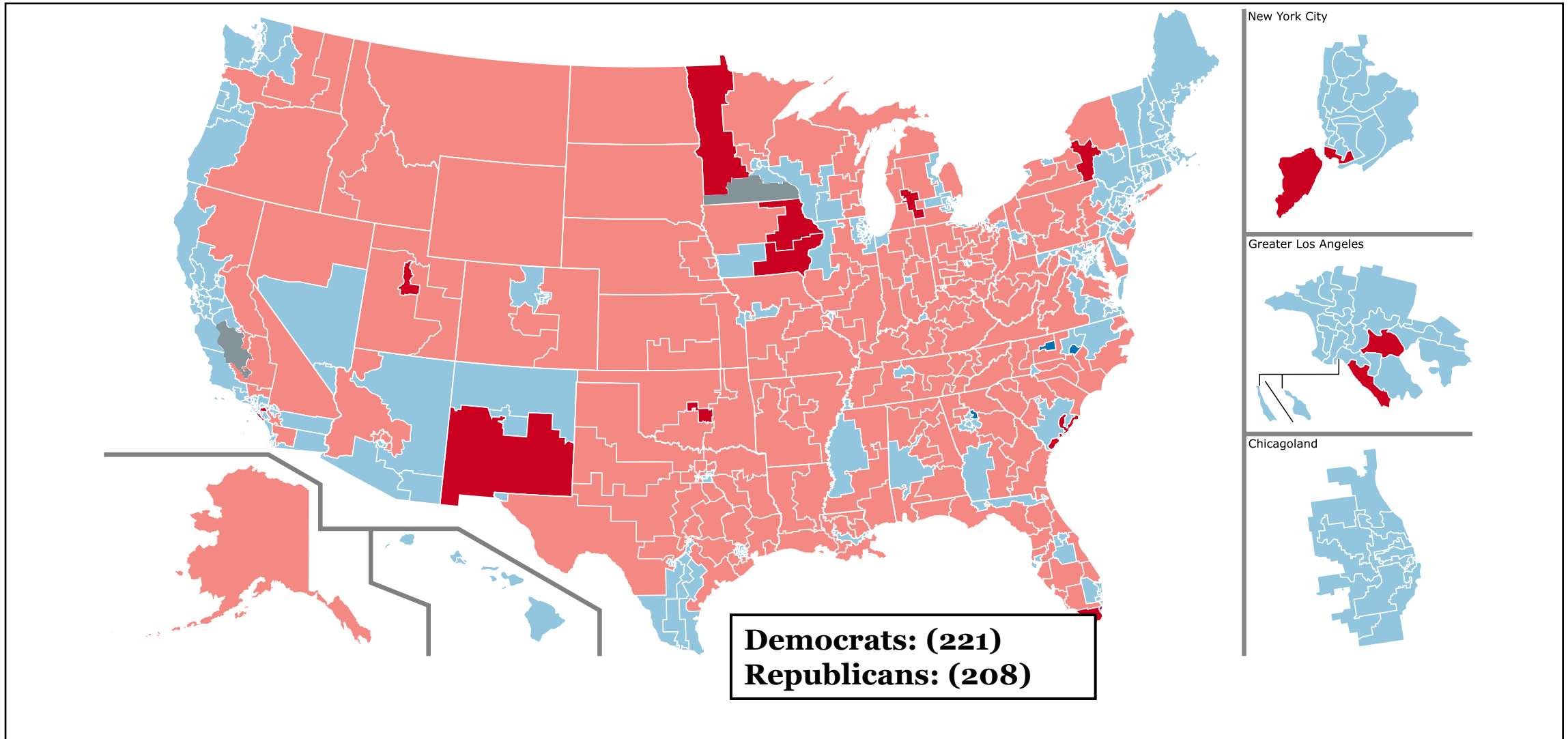


Increasingly Republican

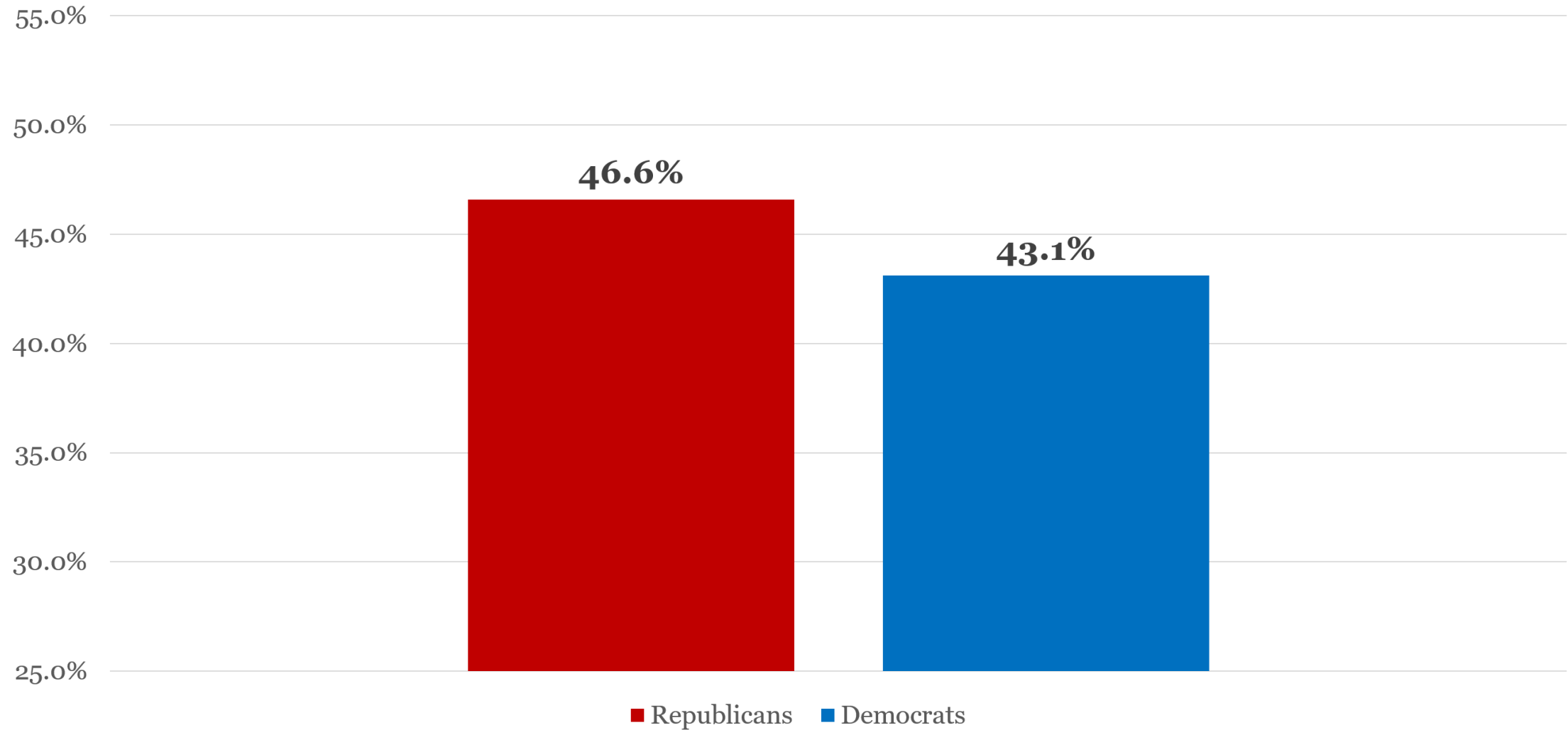
*(Absent a GOP wave, Georgia will decide,
but there MAY be a GOP wave
in Arizona, Nevada, and New Hampshire)*

Current US House

Darker districts flipped in the 2020 General Election (6 Vacancies – CA-22, MN-01 & NE-01, AK-1, TX-34, NY-23)



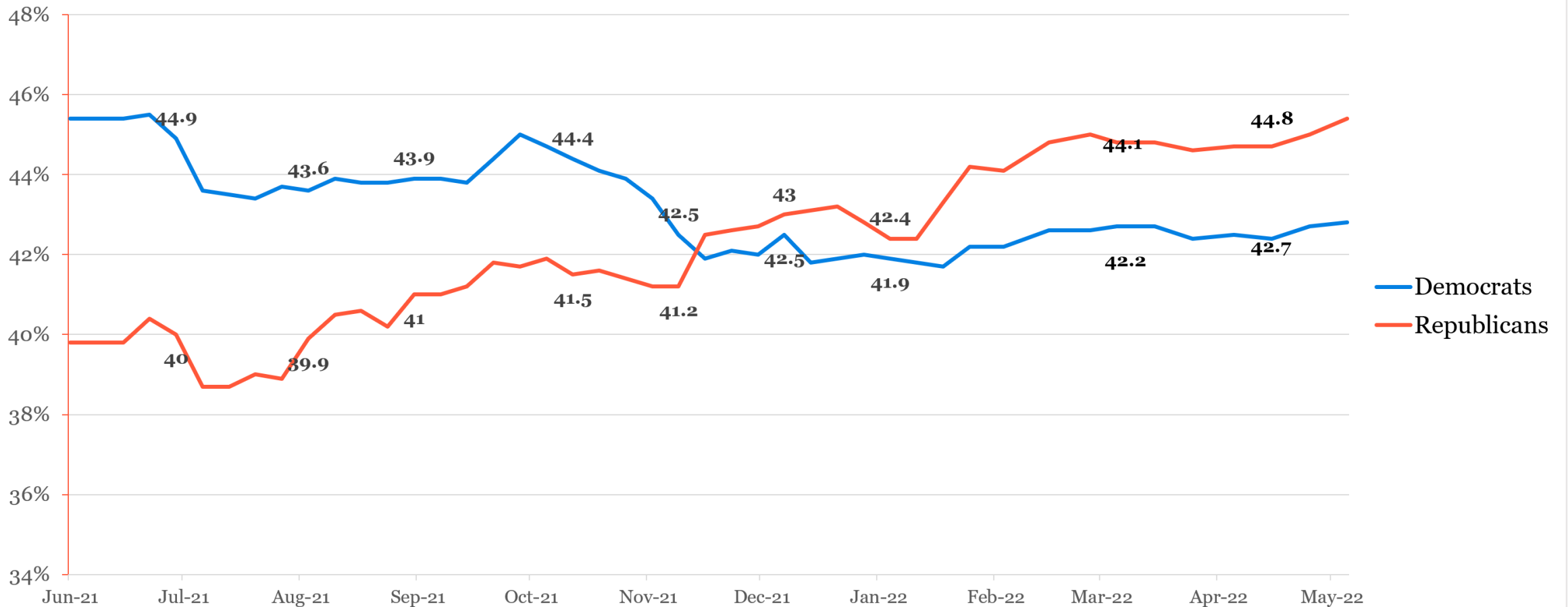
Generic Ballot Preference – 2022 Congressional: GOP +3.5



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 – Cook Report Predictions (where redistricting settled)

Democrat-held seat

Republican-held seat

Open seat – 20 open competitive seats

13 Dem, 0 GOP

AZ-4 Stanton
CA-9 Harder
CA-49 Levin
CO-7 Open
CT-5 Hayes
GA-2 Bishop
IL-11 Foster
NC-6 Manning
NC-03 Kim
NJ-5 Gottheimer
NM-3 Leger Fernandez
OR-4 Open
OR-6 New Seat

Likely Democrat

10 Dem, 1 GOP

CA-13 Open
CA-47 Porter
IL-6 Casten/Newman
IL-14 Underwood
IN-1 Mrvan
MD-06 Trone
NC-1 Open
NV-1 Titus
OR-5 Schrader
RI-2 Open
IL-13 New Seat

Lean Democrat

18 Dem, 8 GOP

IA-3 Axne
IL-17 Open
ME-2 Golden
MI-7 Slotkin
MI-8 Kildee
MN-2 Craig
NV-3 Lee
NV-4 Horsford
OH-9 Kaptur
OH-13 Open
PA-7 Wild
PA-8 Cartwright
PA-17 Open
TX -28 Cuellar
Tx-34 Gonzalez
VA-2 Luria
VA-7 Spanberger
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

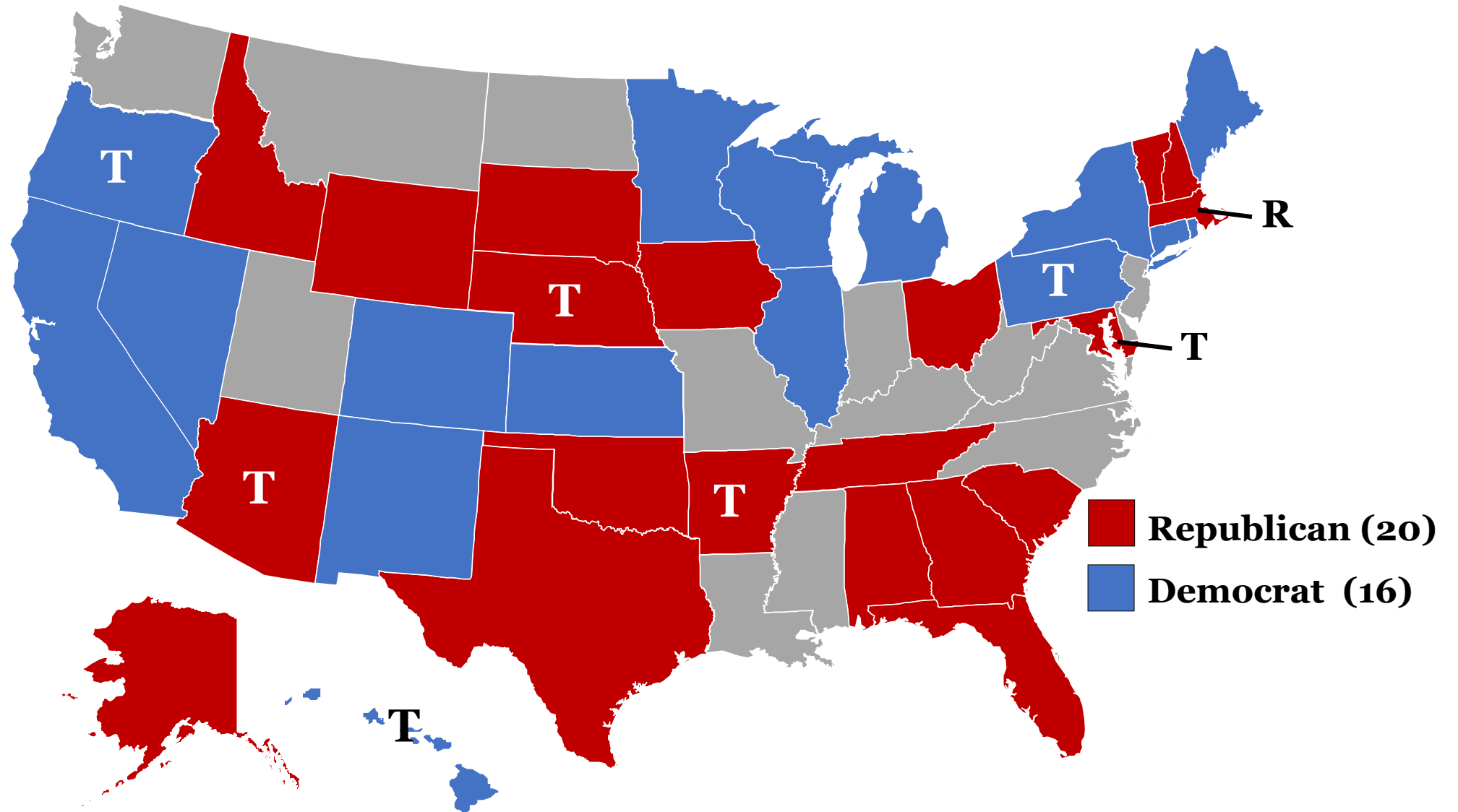
3 Dem, 11 GOP

CA-3 Open
CA-40 Kim
CA-41 Calvert
FL-15 Open
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
FL-07 Open
FL-13 Open

Likely Republican

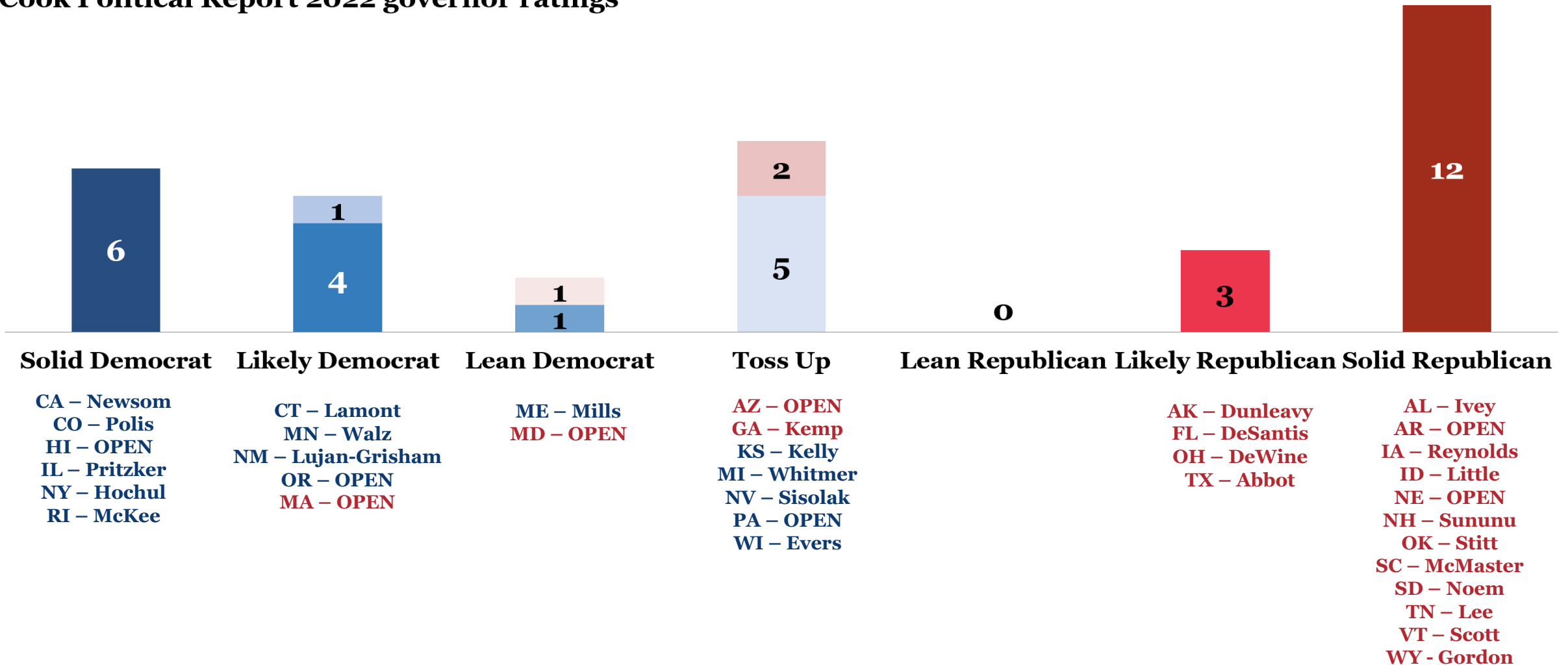
GOP Majority

U.S. Gubernatorial Elections in 2022



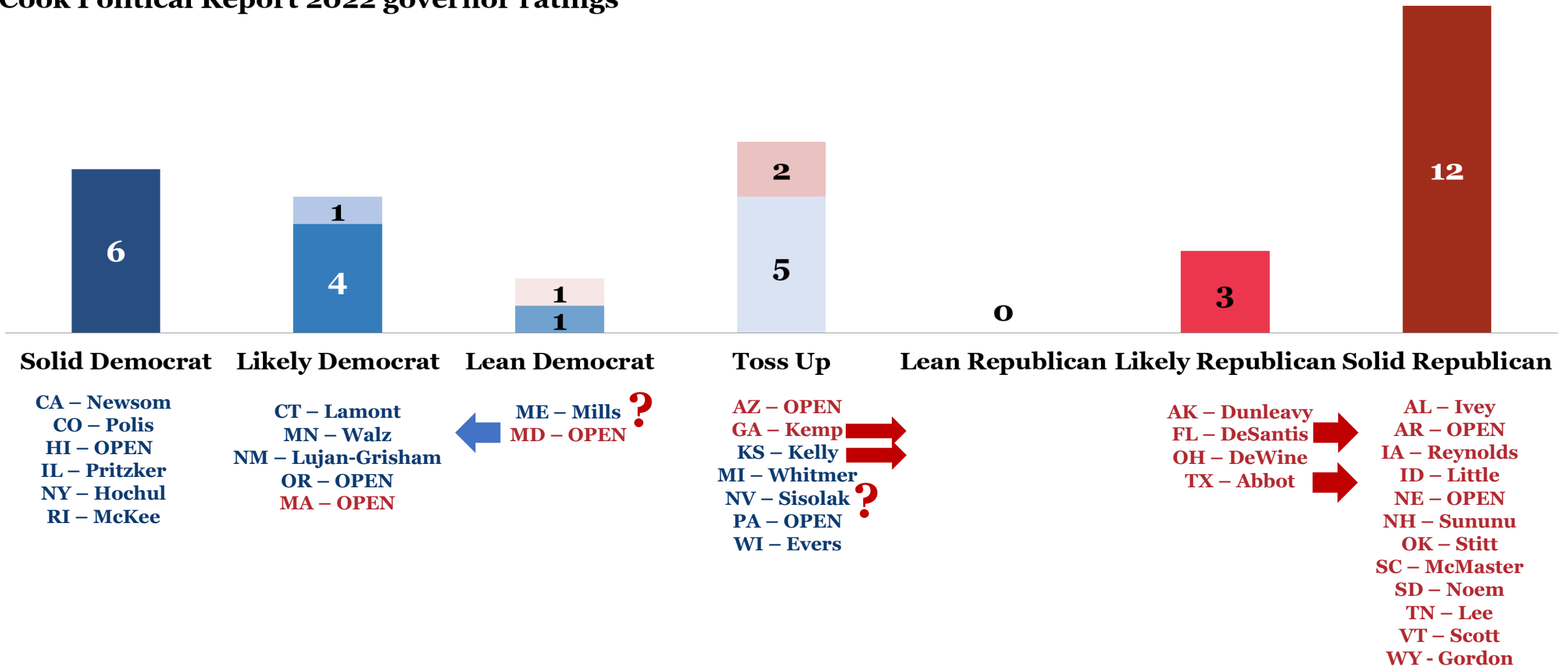
Cook Report Governor Predictions

Cook Political Report 2022 governor ratings



Cook Report Governor Predictions – Hawthorn’s View

Cook Political Report 2022 governor ratings



No Net Partisan Change
(Depending on Georgia)

Kansas -- April 26-27 WPA Intelligence IVR Poll

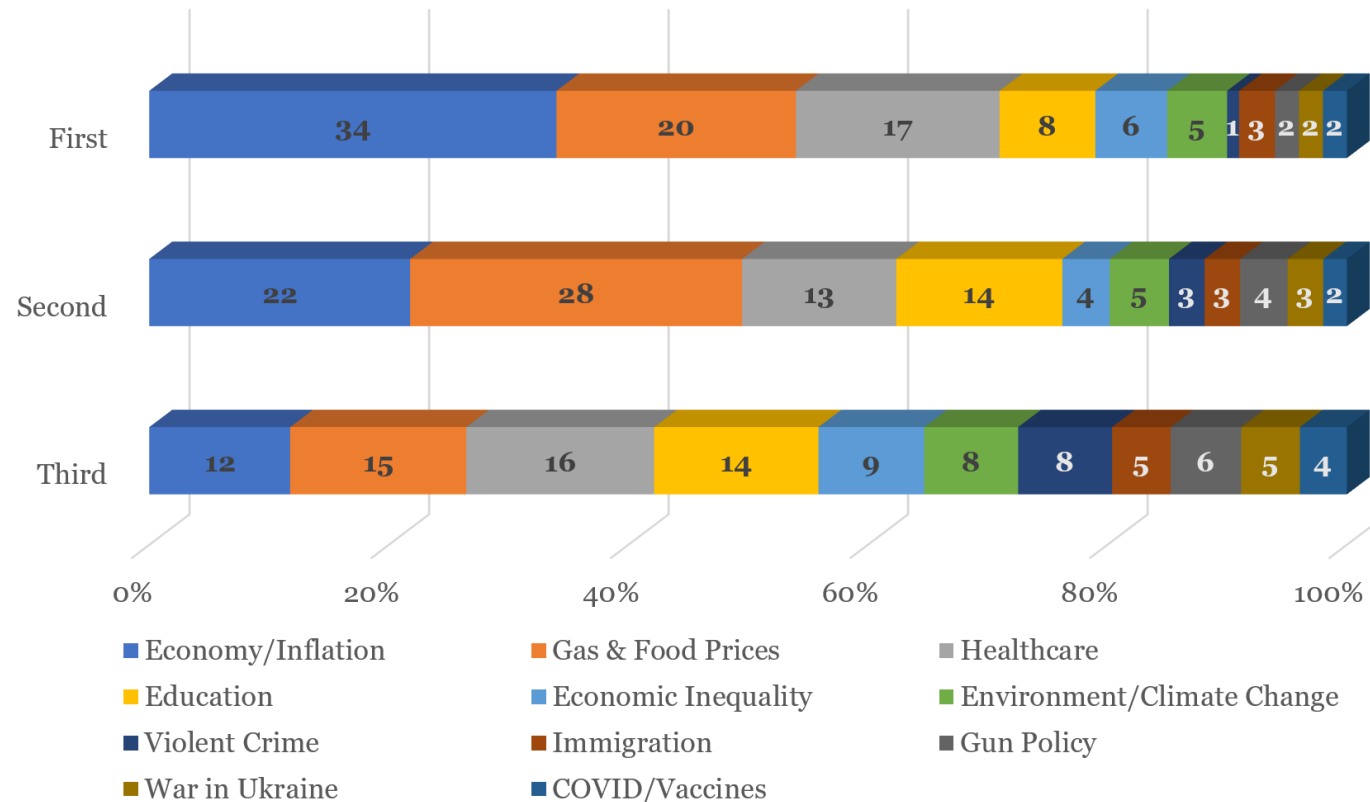
n=500 likely voters (re-stratified)

Governor	Derek Schmidt	47%
	Laura Kelly	43%
A.G.	Kris Kobach	44%
	Chris Mann	41%

Hawthorn Flash Poll KS Likely Voters | May 11-13 | n=450

Most Important Issue: Inflation/Food & Gas Prices

From the following list, What is the most important, 2nd most important and 3rd most important issue to you and your family?



[V. What Voters Are Seeing]





A visit with

The Hawthorn Group

May 16th, 2022