

December 15, 2021

A Look Ahead to the 2022 Midterm Elections and Beyond

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As tumultuous as our politics has become, chances are that the next few years will be even more acrimonious. With the probability that the Republicans will likely take back the House next November, we will be entering a new phase in American politics in which the political incentives are likely to pull the parties even further apart.

The Critical Period that Will Determine the Outcome of the Midterm Elections

With the Democrats in control of the federal government, the midterm elections will be a referendum on their leadership and stewardship.

While elections are about the future, views are formed by how people feel about the current direction of the country and their daily lives. In general, these feelings harden by the end of the summer in the runup to voting in the fall. This is increasingly the case as voting now starts long before Election Day in most states.

While getting COVID under control is a prerequisite to having life return to normal, the condition of the economy will most likely determine the fate of Democrats in 2022.

The three key economic measurements to watch are inflation (the Consumer Price Index), employment and GDP growth. These three metrics most accurately gauge the strength of the economy and impact how voters think about the future. It is important to keep an eye on actions the Federal Reserve takes in response to these economic trends.

In addition to these economic factors it should also be noted that in late June of next year the Supreme Court will likely rule on the pending Mississippi case, *Dobbs v. Jackson Women's Health Organization*, which could potentially overturn *Roe v. Wade*.

There are several key dates to watch in the run-up to the 2022 elections:

- **June 3:** May unemployment numbers are released
- **June 10:** May CPI data are released
- **June 15/16:** The Federal Reserve meets
- **Late June:** The Supreme Court ruling on the Mississippi case is expected
- **July 8:** June unemployment numbers are released
- **July 13:** June CPI data are released
- **July 27/28:** The Federal Reserve meets
- **July 28:** Advanced estimate for Q2 GDP is released
- **August 5:** July unemployment numbers are released
- **August 10:** July CPI data for July are released

The single best snapshot of the mood of the country heading into the midterms will be the release of the University of Michigan Consumer Confidence data for June (on July 15th) and the release for July (on August 12th).

Five Myths About American Politics in the Age Of Trump

The past five years have shown that the coalition that supports Trump and his policies is larger and more durable than people generally thought when he was unexpectedly elected President in 2016. Even if Trump decides not to run again, his effects on the GOP will likely endure.

His populist, nationalist and isolationist views, and even his claims that the 2020 election was stolen, have become Republican orthodoxy.

The results from the 2020 presidential election and this year's races in New Jersey and Virginia paint a much clearer picture of the nature and depth of support for a reshaped, working-class Republican Party.

The results of the 2016 and 2018 elections led to five widely held assumptions that the 2020 Presidential elections and this year's off-year elections demonstrated to be false.

1. Trump's victory in 2016 was an aberration: The common perception that Trump's victory was a fluke, largely attributable to the weakness of Clinton as a candidate, has clearly been disproven by the 2020 results. Last year Trump received the second highest vote total in the history of our country, and 11 million more people supported his candidacy than did in 2016.

2. Demography is destiny and that is good for the Democrats: With Obama's victory in 2008, it has been an article of faith that demographic trends will inevitably make the Democrats the majority party. As the country becomes more diverse, the reasoning goes, it will inevitably become more Democratic.

But the 2020 results tell a different story: the Republican Party made significant inroads with Hispanic, Asian and even some black voters. Particularly troublesome for Democrats is that the increase of support for Trump with Hispanics was seen across the country: from New York state to Florida's Dade County to the Rio Grande in south Texas to Las Vegas. Despite winning Hispanics by nearly 30 points in 2020, Biden had only a 42% job approval with these voters in the November *Wall Street Journal* poll. More troubling for Democrats is that in this poll Hispanics are now evenly split on which party they would support in the upcoming midterm elections.

There are a variety of reasons for this increase in Hispanic support for the Republican Party. Hispanics skew younger, and they share the attributes of other millennials, including a lack of affiliation with either political party. They are also following the assimilation trends of other ethnic groups, voting more on issues than those associated with their ethnicity as they establish multi-generational families in this country. For many Hispanics, there is a cultural conservatism, which finds comfort in many of the positions of today's Republican Party. Lastly, other than saying that they are not Republicans, the Democrats have not given Hispanics a reason to vote for them, creating an opening for the GOP.

3. A higher turnout is always good for Democrats: The results from the 2020 and 2021 elections suggest this is not necessarily the case. The transformation of the Republican party to one that is more populist and working-class has enabled it to tap into a large pool of occasional or non- voters. This is particularly true in the midwestern industrial battleground states of Michigan, Pennsylvania and Wisconsin. While turnout has been historically high in the past two elections, the results show that there is now more of an arms race, with both sides having access to a large pool of new or occasional voters.

In the elections this year turnout was significantly higher compared to four years ago but the increase was far greater among Republicans than Democrats. In New Jersey the Republican candidate for governor received over 350,000 more votes than the nominee in 2017, while Governor Murphy increased his vote total by less than 140,000 between these elections. These patterns held in Virginia as well. Youngkin received nearly 500,000 more votes than the 2017 Republican nominee, while McAulliffe increased his vote by less than 200,000 from the last election.

4. The Trump presidency has realigned the suburbs towards the Democratic party: On the surface that appeared to be true based on the 2018 midterm results and the vote for Biden in 2020. In the 2018 midterms

the Democrats picked up 41 seats, all but a handful in suburban areas. In 2020 Biden improved his performance by 13 points in suburban areas compared to Clinton in 2016.

However, there were signs in the 2020 election that support for Biden from suburban voters had more to do with their dislike of Trump than a realignment with the Democrats. The clearest evidence that year was that Republicans unexpectedly picked up 14 House seats, largely in suburban districts, because of concerns that the Democratic Party has moved too far to the left on cultural issues.

The results from the 2021 elections in Virginia and New Jersey continued this trend of Republican support in the suburbs. In Virginia, Youngkin outperformed Trump by 14 points in the suburbs, while in New Jersey's suburban Bergen County Murphy lagged 11 points behind Biden's vote in 2020.

In the October NBC/Wall Street Journal poll, Biden's job approval among suburban voters dropped 17 points from its level in April, with only 44% approving of the job he is doing as president.

A central focus of the Republicans' efforts next year will be to continue to use education, crime and immigration as wedge issues against the Democrats. These efforts will be supplemented by an economic argument that the Democrats are out to tax, spend and regulate our country into a depression.

5. Trump has pushed independents into the arms of the Democratic Party: While independents were key to the Democrats' success in the 2018 midterms and Biden performed 10 points better with this group than Clinton did in 2016, support for Biden and the Democrats has cratered in 2021. In the most recent Wall Street Journal poll from November Biden only had a 30% job approval with independent voters.

Many disaffected Republicans left the party and became independents due to their dislike of Trump personally rather than his policies. They have never been particularly supportive of the Democrats and have become even more alienated from them this year due to their leftward tilt on social and economic issues. The Republican arguments with suburban voters are also effective with independents as well.

These trends were reflected in the results in Virginia. A key to Youngkin's success was that he did 16 points better with independents than Trump did last year.

The 2022 Congressional Elections

This is the best political environment for the Republicans since 2010. In the first place, history is not on the Democrats' side. With only two exceptions, 1998 and 2002, the president's party has lost House seats in every midterm election since World War II. In addition, the country has voted for change in seven out of the last eight elections. In fact, during the last four presidents' time in office, his party lost control of both the House and Senate. Beyond these longer-term patterns, and perhaps most important, after ten months in office Biden's job approval is the second lowest of any president (Trump had the worst) in the past 70 years.

The U.S. Senate

Our politics has become increasingly nationalized. Of 100 senators, 94 are now members of the party of the presidential candidate who carried their state in 2020. This decline in ticket-splitting has created a huge structural advantage for the GOP due to the allocation of two senators per state, regardless of population.

The next three years will be daunting for the Democrats. They will have to defend 37 of their 50 seats, with a particularly tough 2024 cycle looming, when they will be defending 23 seats of which seven are in red or purple states.

This year, in a 50/50 Senate, there will be 34 races, with the Republicans defending 20 seats and the Democrats 14. Of these races there are now only six that are considered highly competitive, all in purple states. Slightly more than a net of 100,000 votes yielded the final margin of victory in the presidential election in these six states in 2020.

In these tossup races, the Democrats are defending Kelly (AZ), Warnock (GA), and Cortez Masto (NV), while the Republicans are attempting to hold the open seats in North Carolina and Pennsylvania and Johnson (WI).

Democratic chances of maintaining control also hinge on holding Hassan (NH), where the Republicans have been unable to attract a tier-one candidate, as well as nominating viable general election candidates in Pennsylvania and Wisconsin.

The results from the Republican primaries could have the greatest impact on their chances to take back control in November. Trump has already been active in endorsing out-of-the-mainstream candidates with checkered pasts. His endorsed candidate in the open Pennsylvania Senate race was recently forced to suspend his campaign due to allegations of domestic abuse.

The biggest threat to the GOP of not taking back the Senate would be a failure to nominate viable general-election candidates in these toss-up states.

Under a worst-case scenario, the Republican-leaning states of Ohio and Missouri could be in play for the Democrats if the GOP nominates extreme, flawed general-election candidates.

The Republicans have a track record of nominating unelectable candidates in Senate races. In 2010, a year of historic victories for the GOP, they squandered the opportunity to take control of the Senate by nominating a candidate in the Delaware open seat who practiced witchcraft and questioned the theory of evolution, while in Nevada the GOP nominee wanted to phase out Social Security. Two years later the Republicans failed to gain control of the Senate by nominating a candidate in Missouri who defended "legitimate rape," while in Indiana their nominee stated that pregnancies caused by rape were acts of God.

Key primary dates to watch in the U.S. Senate races include:

- **Ohio** (open, Portman): May 3 primary
- **North Carolina** (open, Burr): May 17 primary
- **Pennsylvania** (open, Toomey): May 17 primary
- **Alabama** (open, Shelby): May 24 primary
- **Georgia** (Warnock): May 24 primary/June 21 runoff
- **Nevada** (Cortez Masto): June 14 primary
- **Arizona** (Kelly): August 2 primary
- **Missouri** (open, Blunt): August 2 primary
- **Wisconsin** (Johnson): August 9 primary
- **New Hampshire** (Hassan): September 13 primary

U.S. House of Representatives

The Democrats' five-seat majority is the narrowest margin of control in 20 years. Due to historical patterns and the reapportionment process, the Republicans are favored to take back the House next year. If the Republicans pick up a net of 35 seats next year -- a distinct possibility -- they would achieve their highest total of members in the House since 1929. However, the Republican win total could be somewhat tempered by the nationalization of our politics, in addition to their unexpected success in the 2020 House elections when they picked up a net of 14 seats.

During the 2020 election, an analysis by the New York Times identified over 85% of House seats as noncompetitive and considered only 61 to be battlegrounds. When the final results were tabulated, 419 of 435 members elected -- fully 96% -- were of the same party as the presidential candidate who carried their districts.

The current reapportionment and redistricting process will likely have as big an impact in determining the outcome of House races as the actual voting next fall. In this process, the Republicans have a sizable advantage over the Democrats across the country. They have total control of 23 states, compared to 15 for the Democrats. As a result they will be able to determine the composition of 187 House seats, compared to only 75 for the Democrats.

The Democrats had been counting on the states with some form of a non partisan commission process to diminish some of the Republican advantages. However, in many of these states these commissions have been circumvented or ignored.

With states beginning to finalize their congressional maps, most analysts already have the Republicans picking up more than the five seats necessary to regain control of the House. Subject to court challenges, the Republicans' most significant gains will likely be in Texas, Florida, North Carolina, Ohio, and Georgia, while the Democrats' pick-ups will be largely limited to Illinois and New York.

In addition to picking up these seats, through their control of the process in many states, the Republicans have solidified their incumbents. In a recent Washington Post analysis of the 15 states dominated by the Republicans that have approved their congressional maps, the number of districts where the presidential margin of victory in 2020 was 5% or less has been reduced from 23 to only 10 seats.

Along with the reapportionment process, a perceived unfavorable political environment has already led 19 House Democrats to announce they will not seek reelection, and this number is expected to grow by the end of the year. These retirements are leading indicators of the next election. A number of senior members have declared their expectation that the Democrats will lose control by announcing their retirements rather than risk serving in the minority in the next Congress. In addition, in over half of these retirements, negative redistricting maps and Biden's narrow margin of victory in those districts in 2020 led to the flight to the exits.

There were 44 House Democrats who won by less than 10% in 2020. Seven of those districts were carried by Trump. The open seats, along with these districts, will be the battlegrounds.

State and Local Elections

There will be 36 governor's races next year, with nine out of the ten largest states (all but North Carolina) holding elections. Mirroring the trends in federal races of a nationalized electorate, there are only six races at this point that are considered highly competitive.

The Democrats are defending four governorships in states that Biden narrowly carried -- Whitmer (Michigan), Sisolak (Nevada), Evers (Wisconsin), and Pennsylvania's open governorship -- in addition to trying to hold Kelly in Kansas, a state Trump won by over 14 points in 2020.

With incumbent Governor Ducey term-limited, the GOP is defending the open seat in Arizona. The outcome may be decided by the candidate who emerges from the Republican primary in early August. Kemp's seat in Georgia is also at risk due to a messy primary, as well as Abrams' candidacy in the general election. The Republicans will likely lose the open seats in Massachusetts and Maryland.

These governor's races could have a significant impact on the 2024 presidential elections. If the Republicans pick up any of the presidential battleground states in the industrial Midwest (Michigan, Pennsylvania, Wisconsin), they will take total control of government in these states and, with this power, they could determine the voting procedures and counts in the next presidential election. In addition, DeSantis (FL) and Abbott (TX) are favored for reelection in 2022, with both likely to consider running for president in 2024.

Access to Voting

The country is moving in opposite directions on how and when people are able to vote. The states with the most restrictive laws are making it even more difficult for people to vote. The states with the most accessible procedures have enacted laws to make it even easier.

As of September 27th, according to the Brennan Center, 19 states (including the presidential battlegrounds of Arizona, Georgia and Florida) had enacted 33 laws making it harder for people to vote, while 25 states had passed 62 laws making it easier.

In addition, in seven states west of the Mississippi (California, Colorado, Hawaii, Nevada, Oregon, Utah, and Washington) as well as in Vermont, vote-by-mail is the only way to cast ballots in elections.

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