

# **THE INSIDE TRACK: 2022 MIDTERM ELECTIONS**

## **SEPTEMBER 27, 2022**

© 2022 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.



# **AGENDA**

**1.MAIN ISSUE**

**2.ISSUE DEEP DIVE**

**3.ELECTION**

**4.QUESTIONS?**

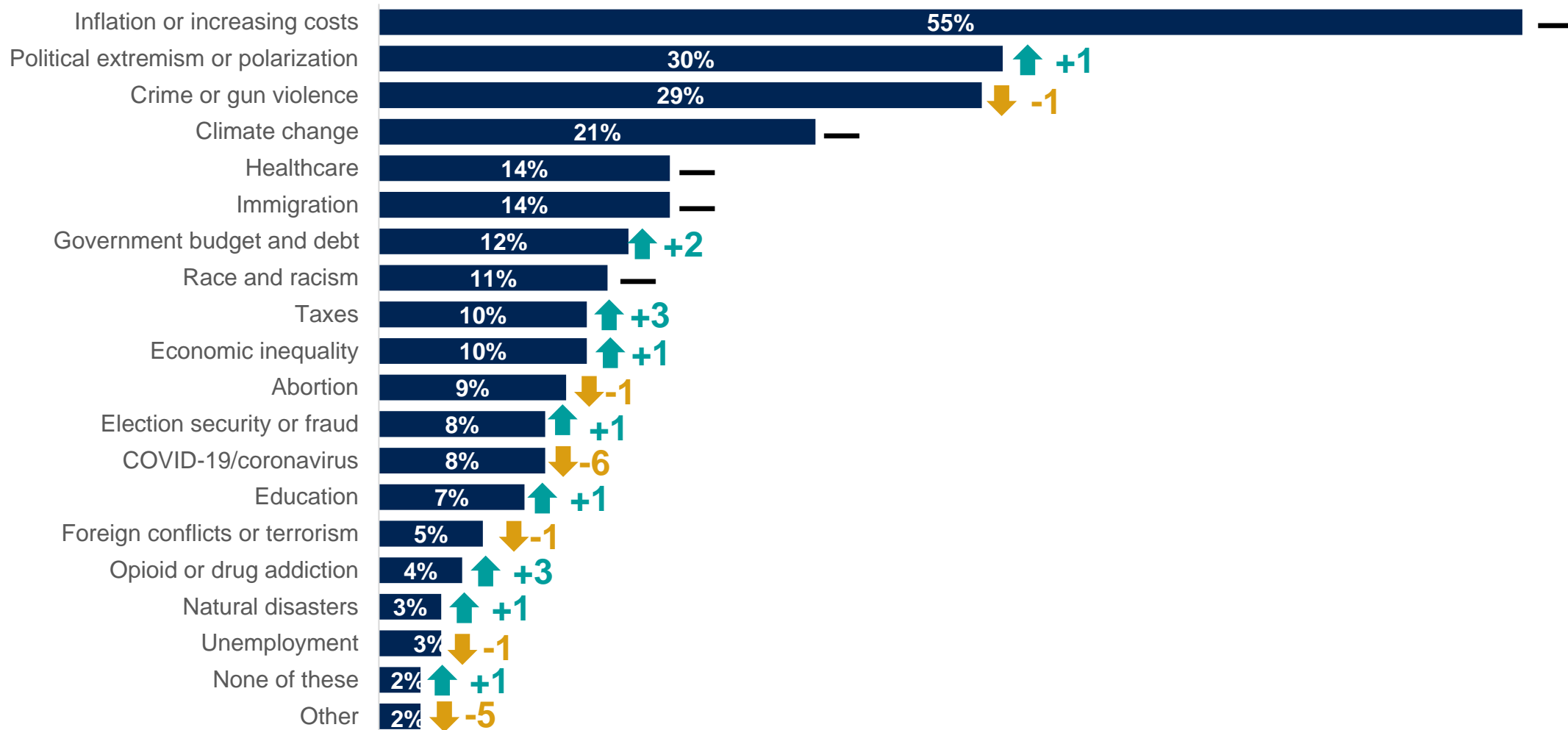
# MAIN ISSUE

1

# Inflation remains the top concern for Americans

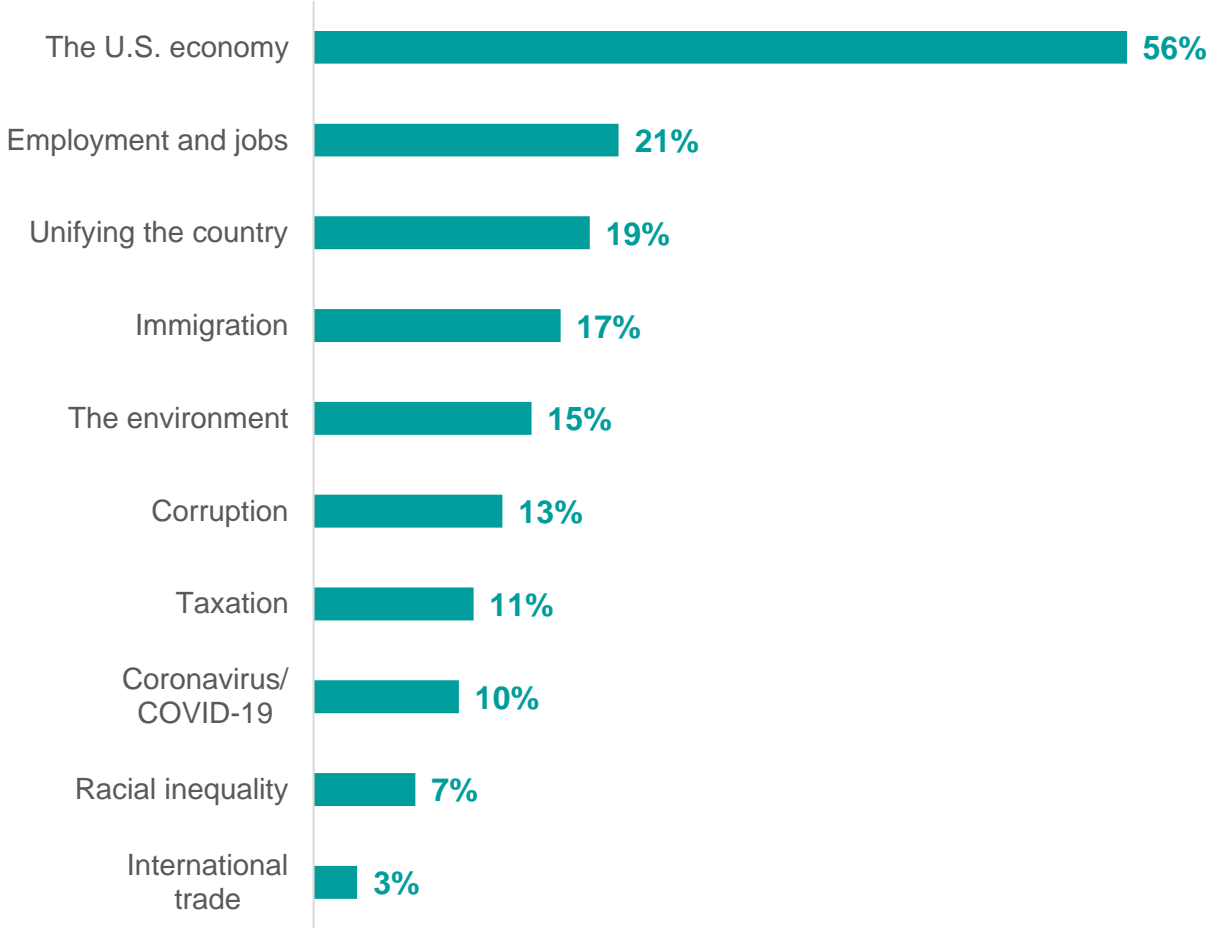
Percent who find the following topics to be the most worrying to them personally

*Change in main issue  
month-over-month*

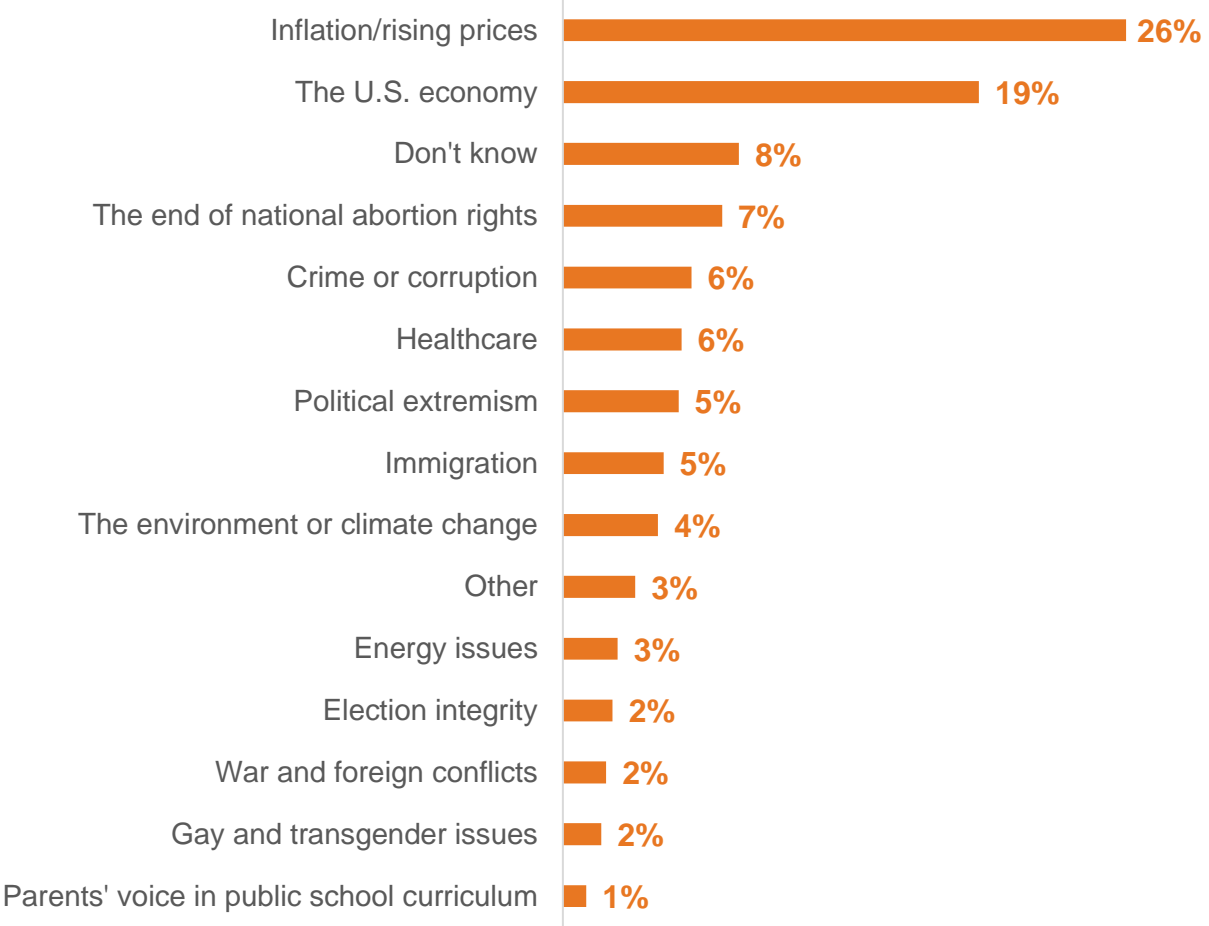


# The economy and inflation are the main focus for the election

What do you want President Joe Biden to prioritize?



What is the issue that will most influence your choice of political candidate in the upcoming November midterm elections?

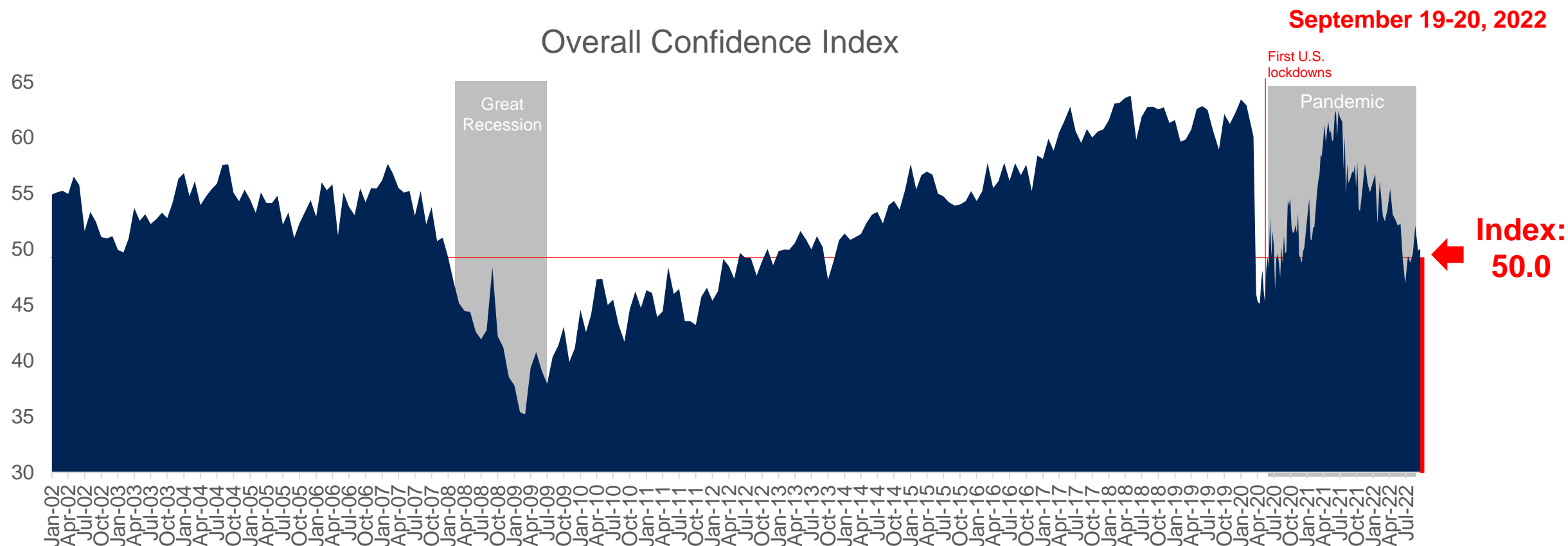


# ISSUE DEEP DIVE

# 2

# Consumer confidence remains below pre-pandemic levels

Consumer confidence Index over between 2002-2022

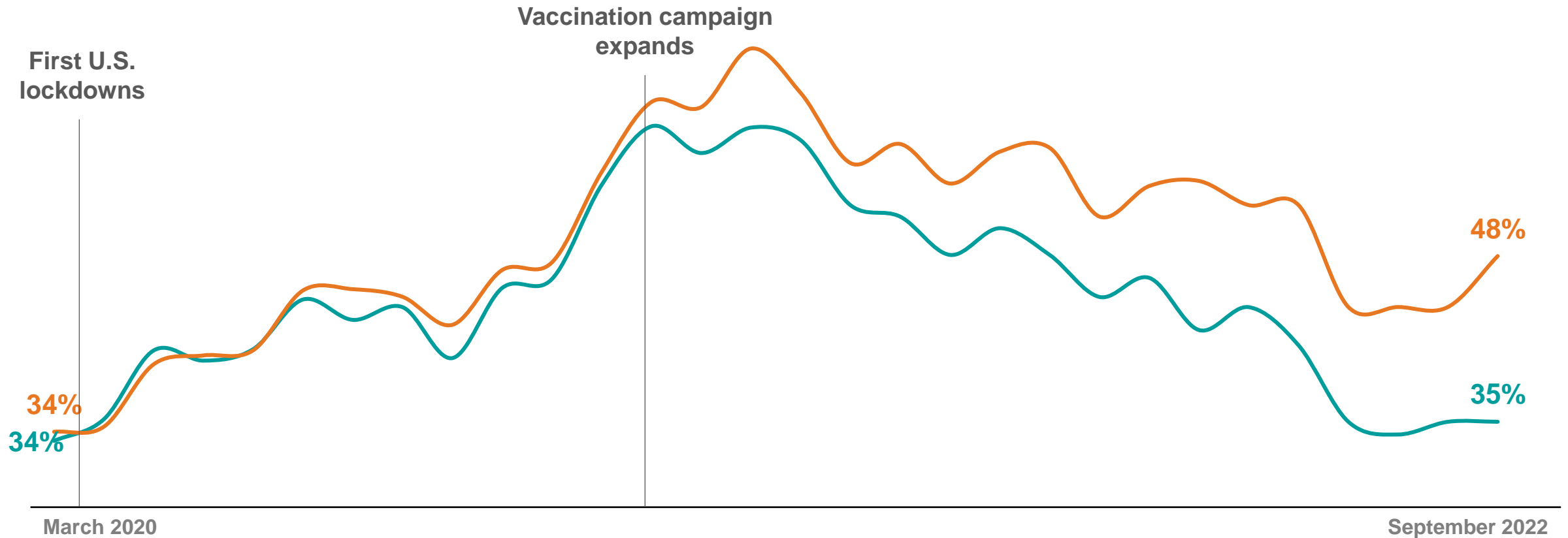


Source: March 2011 to early March Monthly Refinitiv-Ipsos Primary Consumer Sentiment Index  
March 25, 2020 to date Ipsos-Forbes Advisor U.S. Consumer Confidence Weekly Tracker

# Employment and cost of living delinked in current economy

Comfort with making 'other' household purchases vs. people's perceptions about their job security

■ Their job security   ■ Their ability to make "other" household purchases



Source: March 2011 to early March Monthly Refinitiv-Ipsos Primary Consumer Sentiment Index  
March 25, 2020 to date Ipsos-Forbes Advisor U.S. Consumer Confidence Weekly Tracker



# Comfort with major household purchases sliding

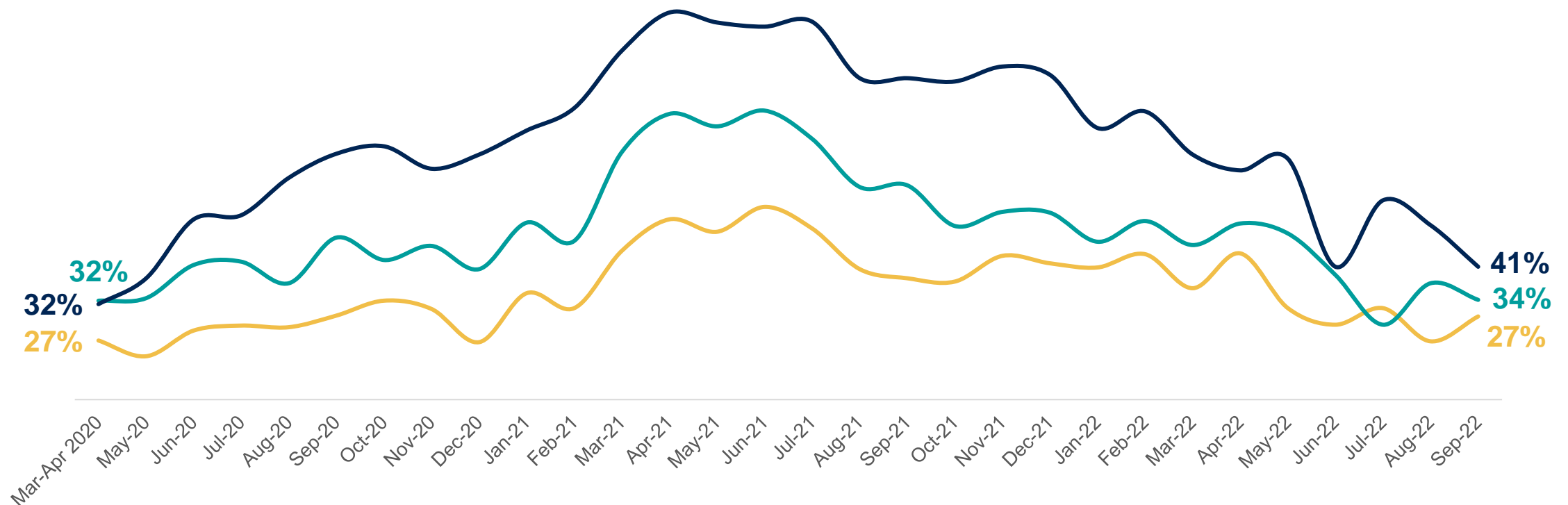
Percent who feel more comfortable making major household purchases compared to 6 months ago

By household income

■ Earns \$100k+

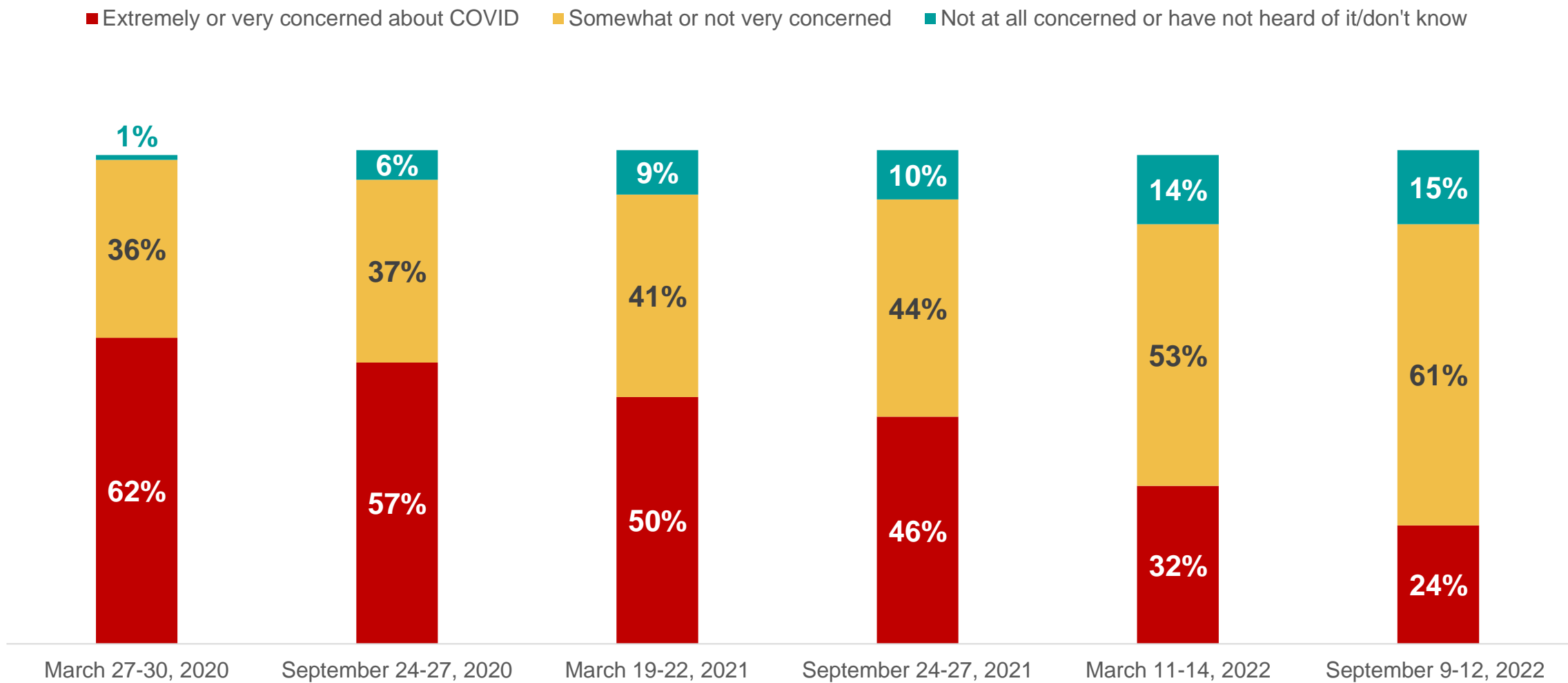
■ Earns between \$50k-\$100k

■ Earns less than \$50k



# Fewer are now extremely or very concerned about COVID, though most aren't

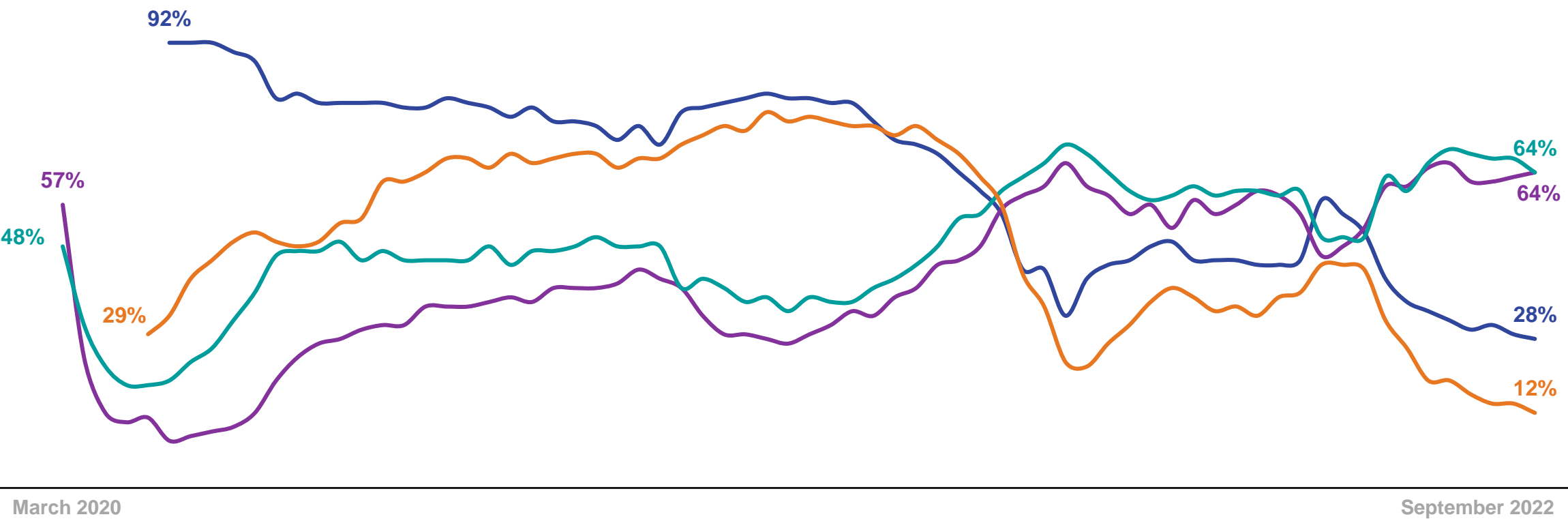
Percent who are concerned about COVID



# Two and half years of behavior change

Percentage of Americans who have \_\_\_\_\_  
in the last week

- Social distanced
- Visited friends or relatives
- Gone out to eat
- Worn a mask outside the home at all times

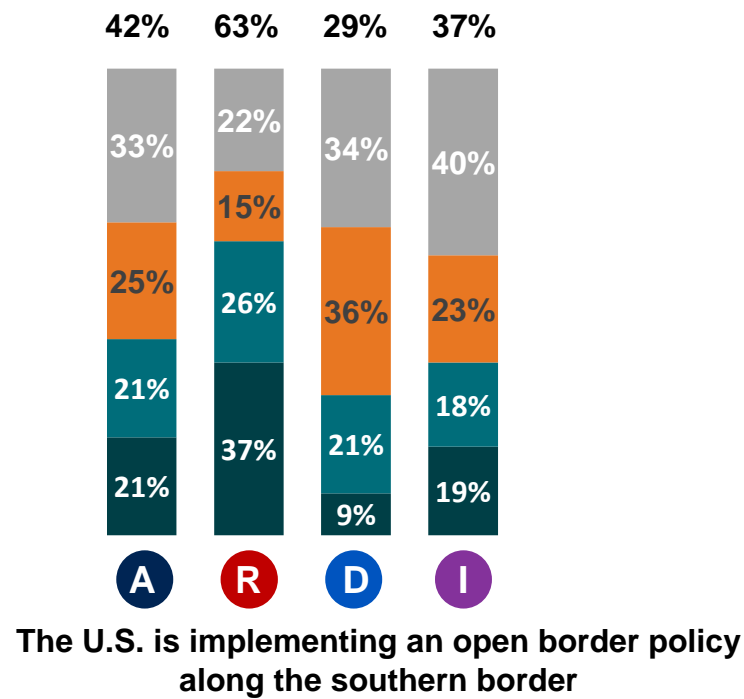
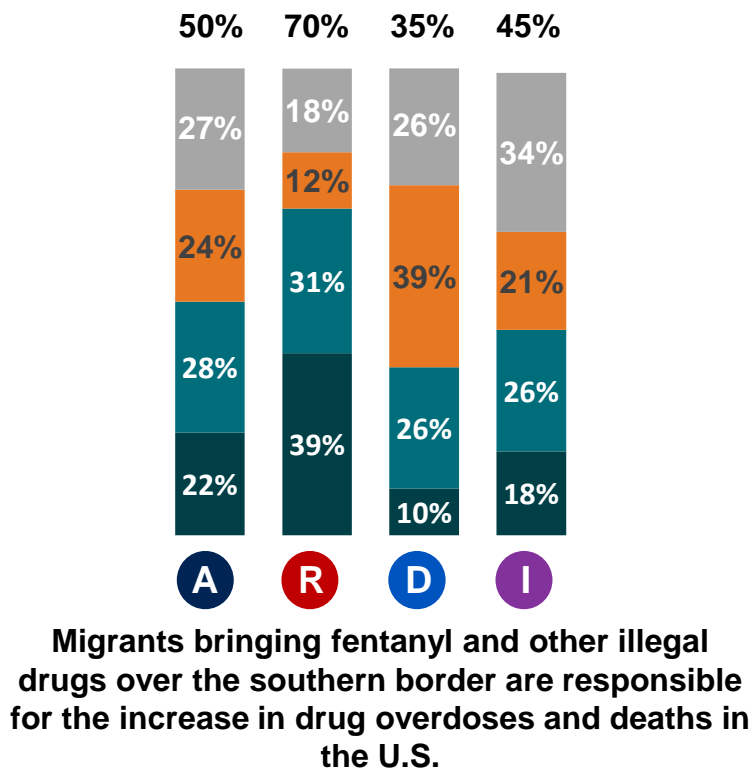
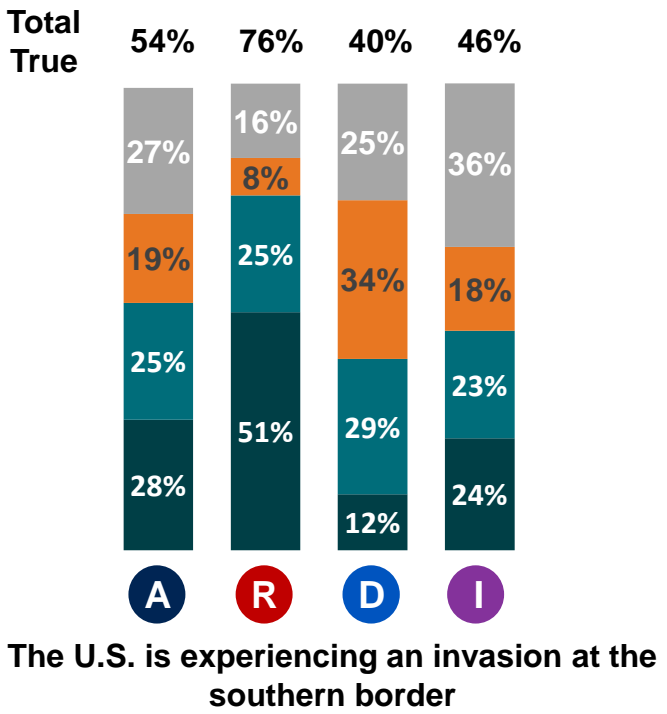


# On immigration, most buying into idea of “invasion” at southern border

About half believe immigrants are transporting fentanyl and other illegal drugs across the border.

To what extent, if any, do you believe the following are true?

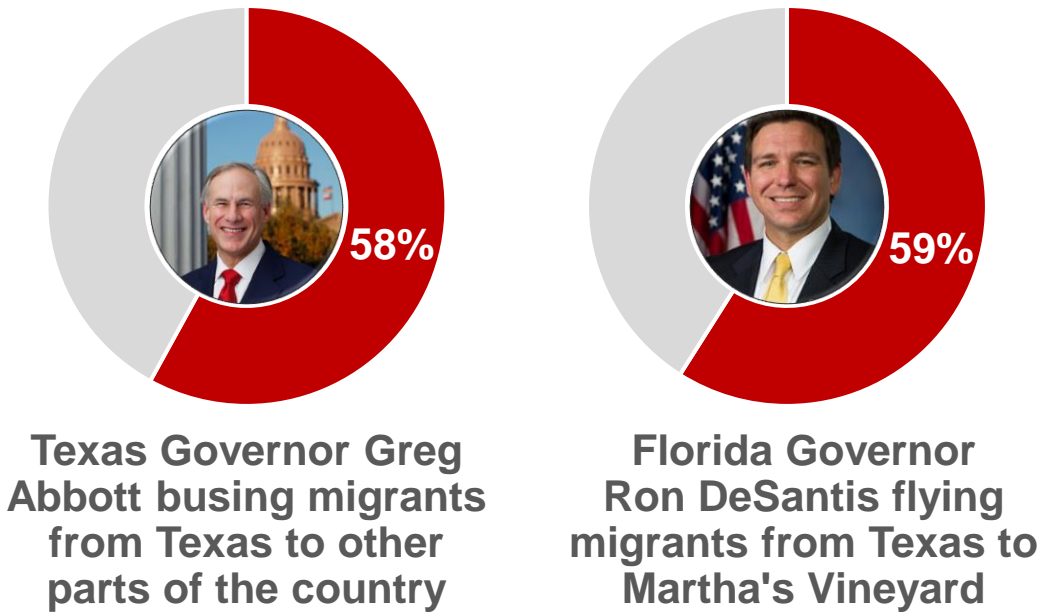
% Selecting    ■ Completely true   ■ Somewhat true   ■ Completely false   ■ Don't know



# Just one in four Americans support states using tax dollars to transport migrants

Percent of Americans who have heard, read, or seen something about the following

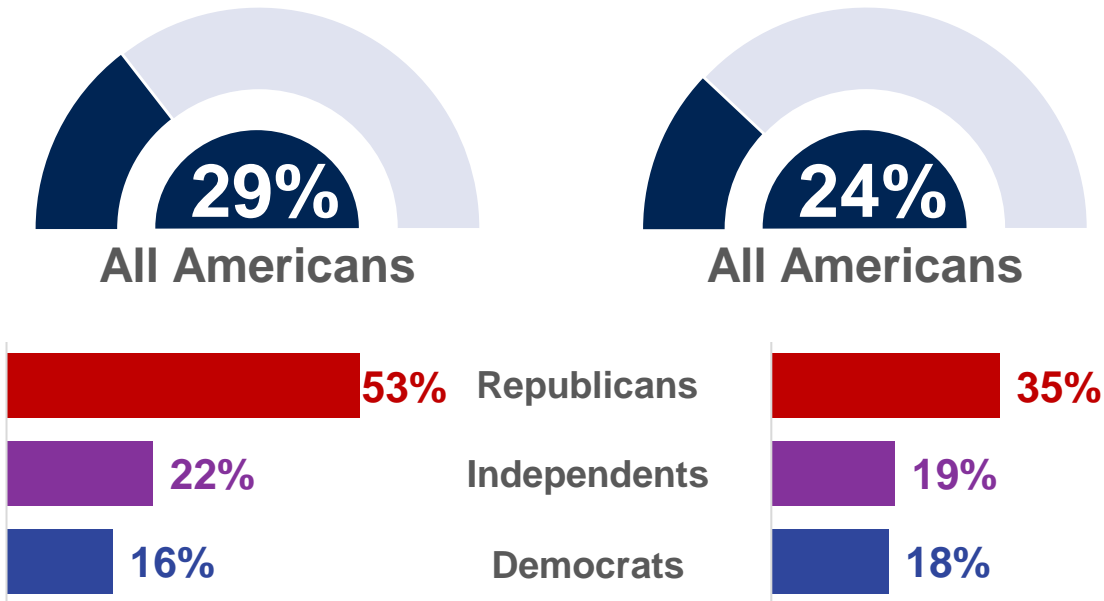
% A lot/Some



Percent of Americans who support the following

Leaders of some states busing or flying migrants to other states or Washington D.C.

States using tax dollars to pay to transport migrants who have arrived in their territory to other states or Washington D.C.

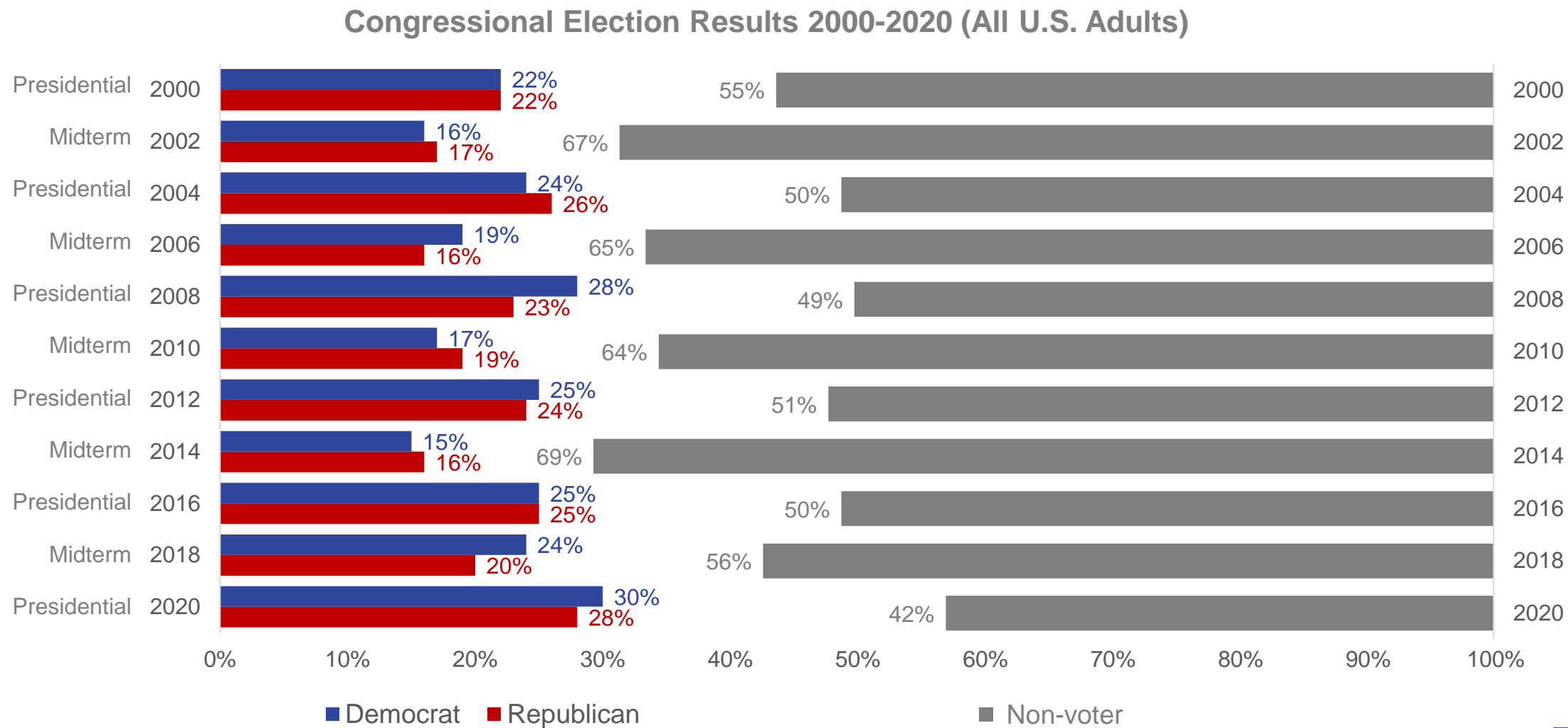


# ELECTION

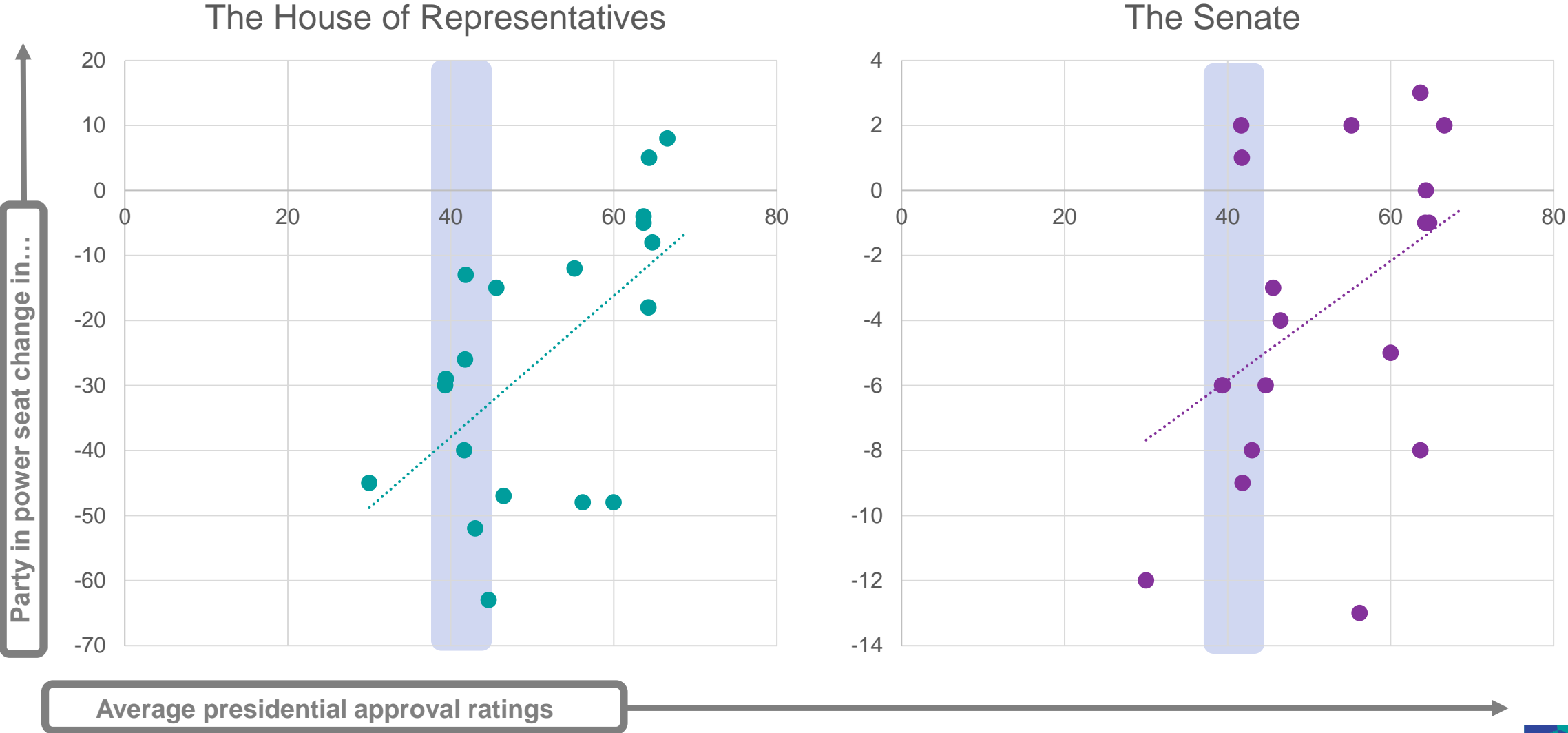
# 3

# Midterms average 1/3 of population voting

Analysis of past election results



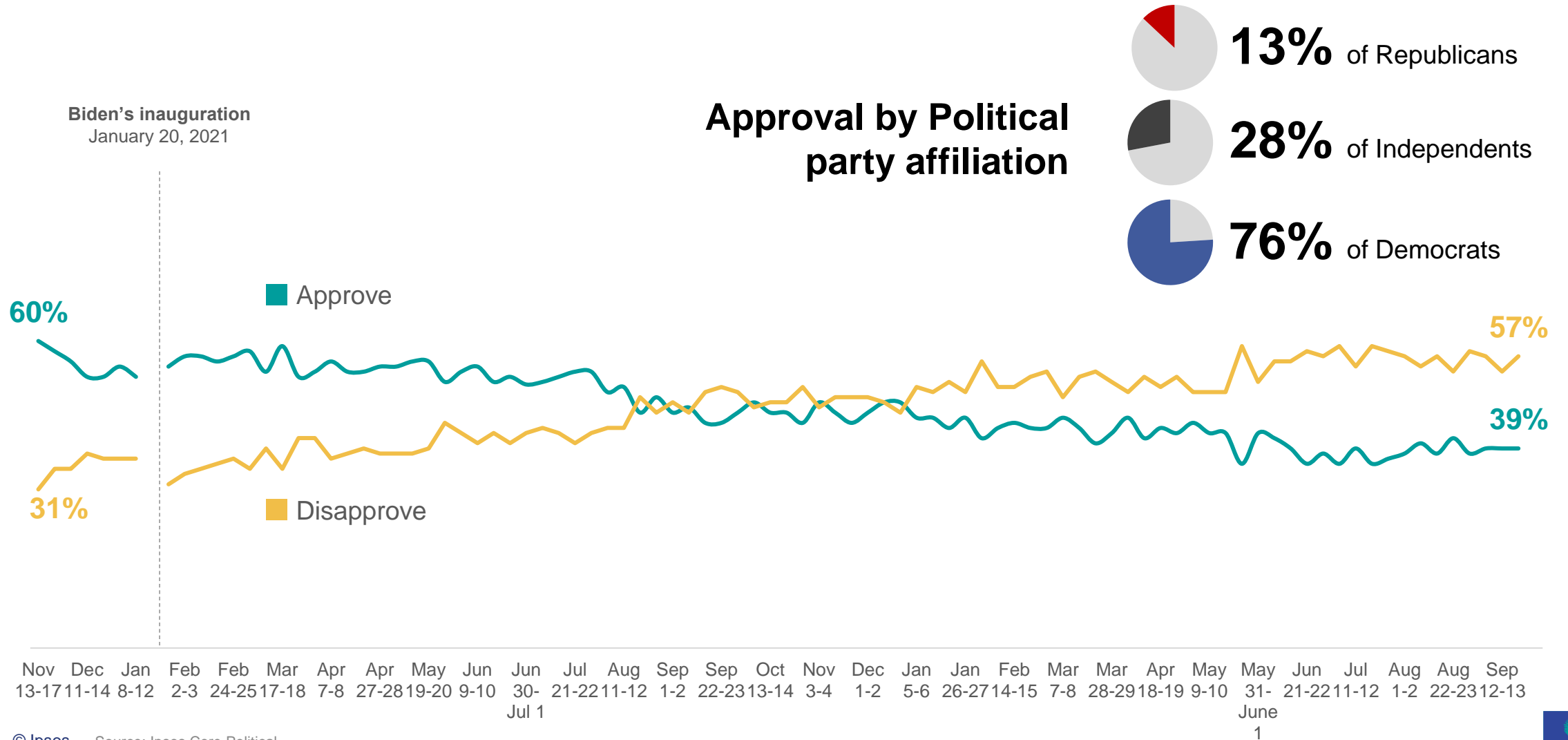
# Outcomes tend to swing with presidential approval rating





# Biden's approval rating falls with rising inflation

Overall, do you approve or disapprove of the way Joe Biden is handling his job as President?

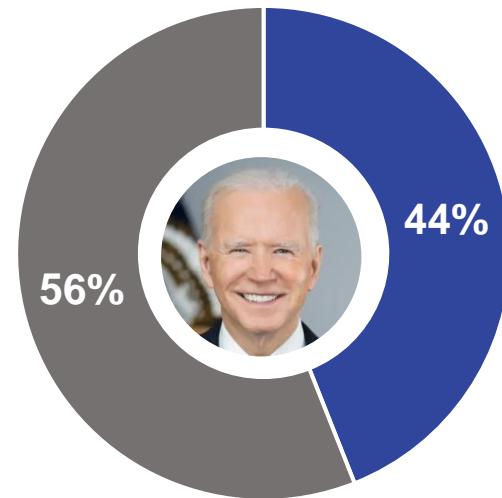


# As midterms (and 2024) loom, Republican voters more in Trump's corner than Democrats in Biden's

Which of the following statements comes closest to your view, even if neither is exactly right?

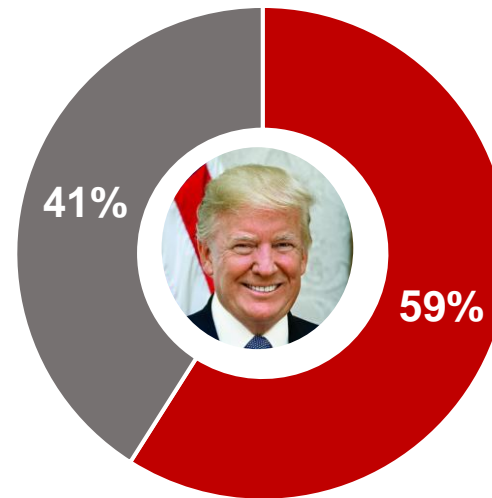
% Selecting

## Among Democratic voters



- President Biden **should be the Democratic nominee** for president in 2024 and deserves re-election
- It's time for a change within the Democratic Party, and President Biden **should not run for re-election** in 2024

## Among Republican voters



- President Trump **should be the Republican nominee** for president in 2024 and deserves re-election
- It's time for a change within the Republican Party, and President Trump **should not run for re-election** in 2024

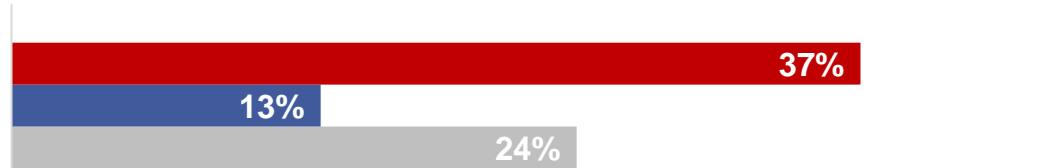
# Most Americans say they don't believe Democrats accomplished most of their objectives, but the reasons why vary

Democrats blame Republicans; Republicans blame infighting and Democrats' unwillingness to take the needed steps

Which comes closest to your opinion, even if none are exactly right?

Overall Democrats Republicans

Democrats have been unable to get stuff done because they have been unwilling to take needed steps to push things through



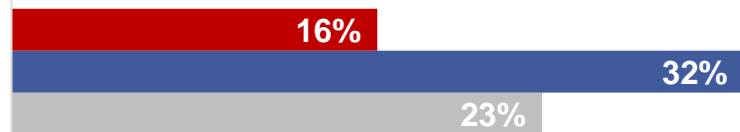
Democrats have been unable to get stuff done because Republicans keep blocking their efforts



Democrats have been unable to get stuff done because they are too busy fighting with each other

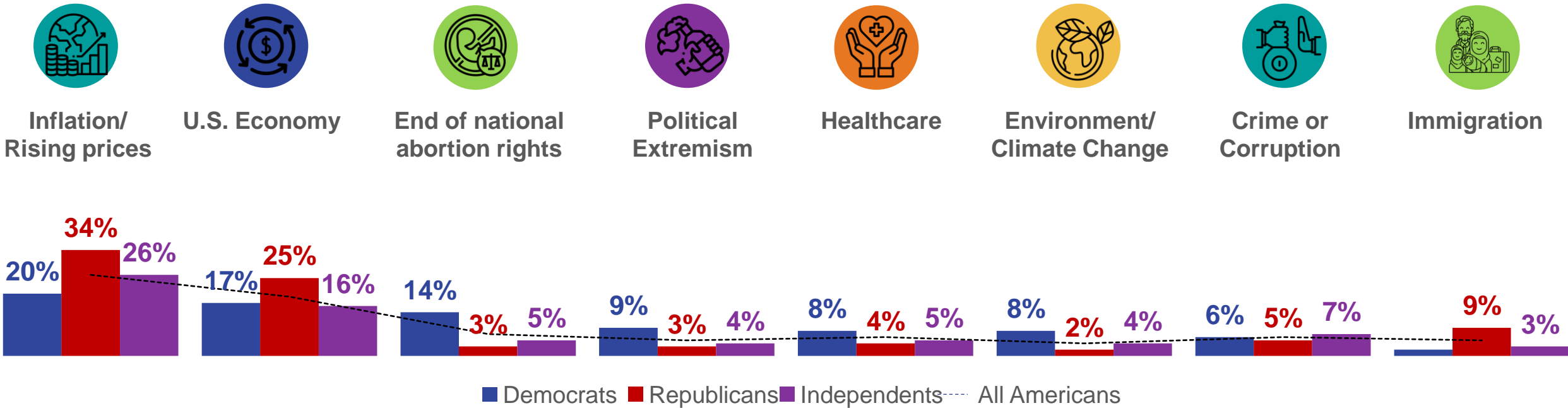


Democrats have been able to accomplish most of their objectives in 2021 and 2022



# Candidate performance on inflation and economy will be critical when deciding who to vote for

What is the issue that will most influence your choice of political candidate in the upcoming November midterm elections?



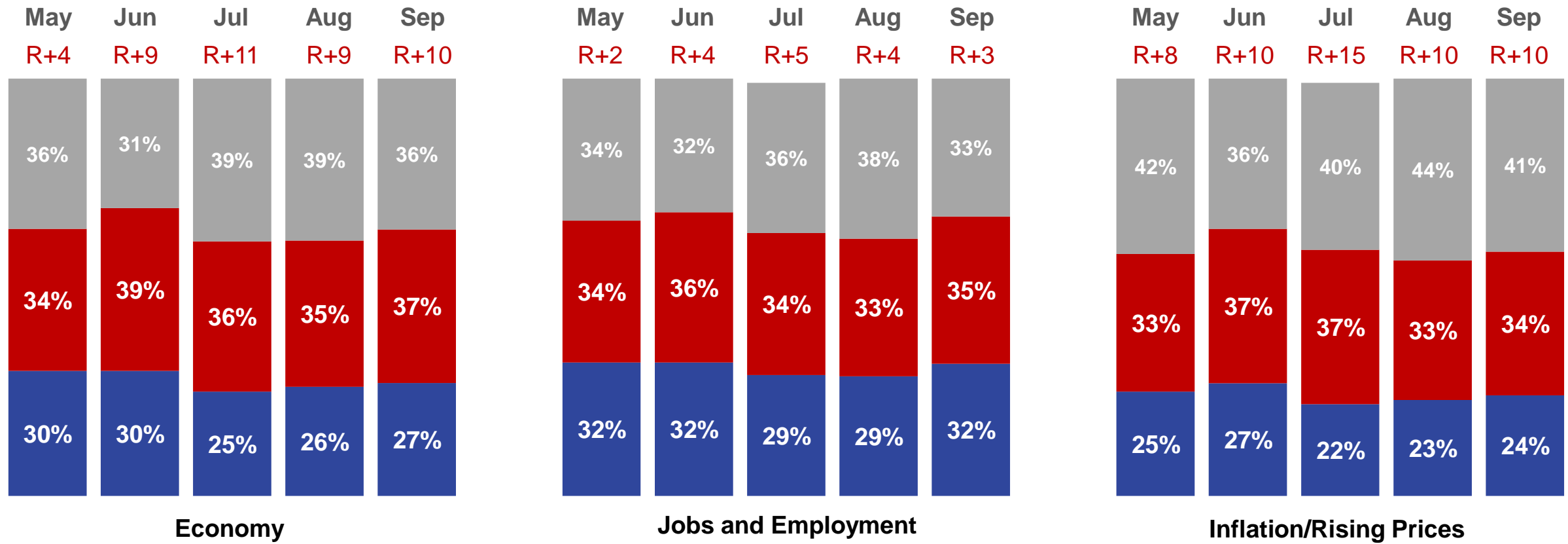
Source: Reuters/Ipsos September 7 – September 12, 2022  
Base: All Americans (N=4,411) Democrats (N=2,116), Republicans (N=1,599), independents (N=520); \*DK/Other omitted  
Icons designed by [Flaticon](#)

# Republicans outperform Democrats on the economy and inflation

In your opinion, which political party has a better plan, policy or approach to each of the following?

All Respondents

■ Democratic Party ■ Republican Party ■ Other

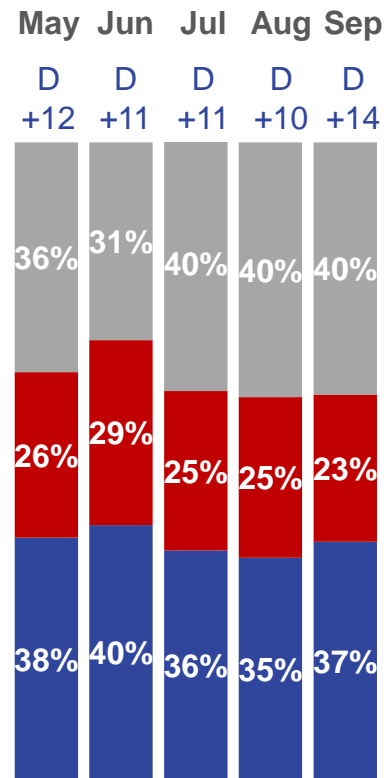


# Democrats are stronger on lower priority issues

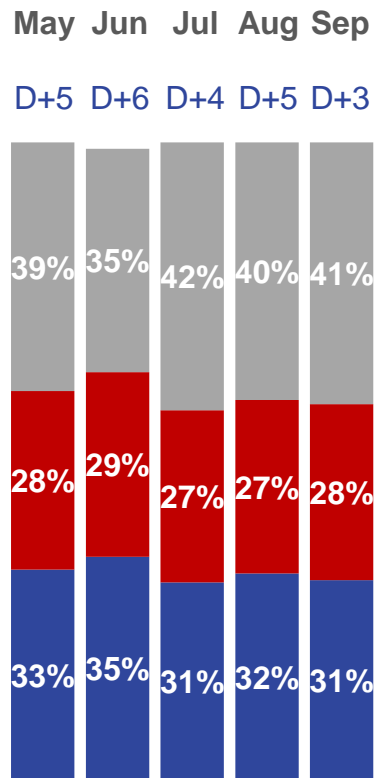
In your opinion, which political party has a better plan, policy or approach to each of the following?

All Respondents

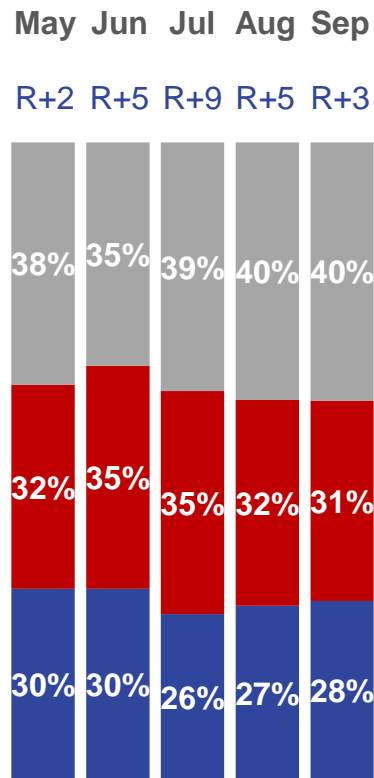
■ Democratic Party ■ Republican Party ■ Other



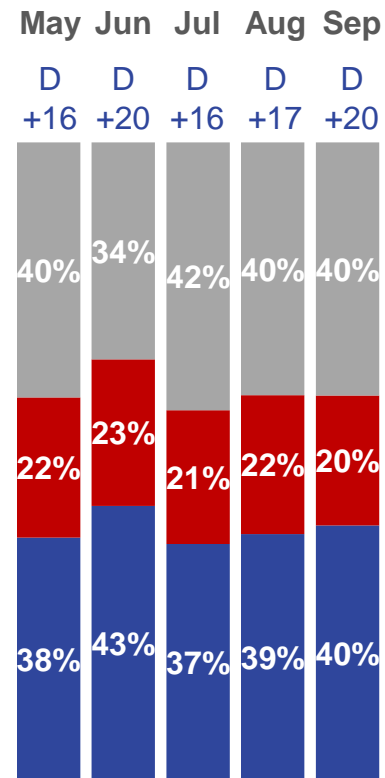
Healthcare



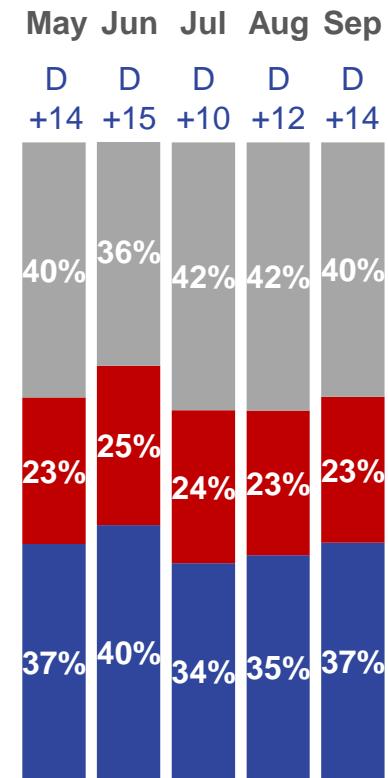
Education



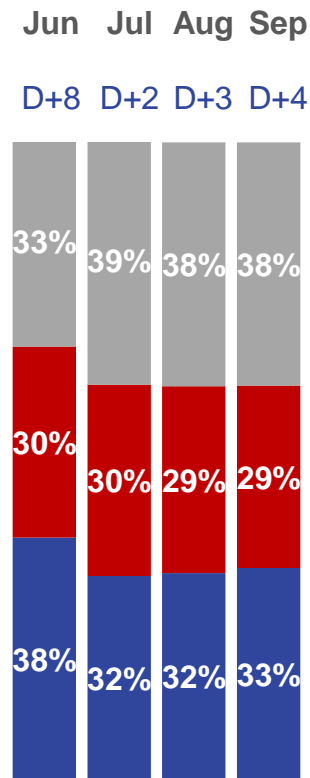
Foreign Policy



Women's Rights



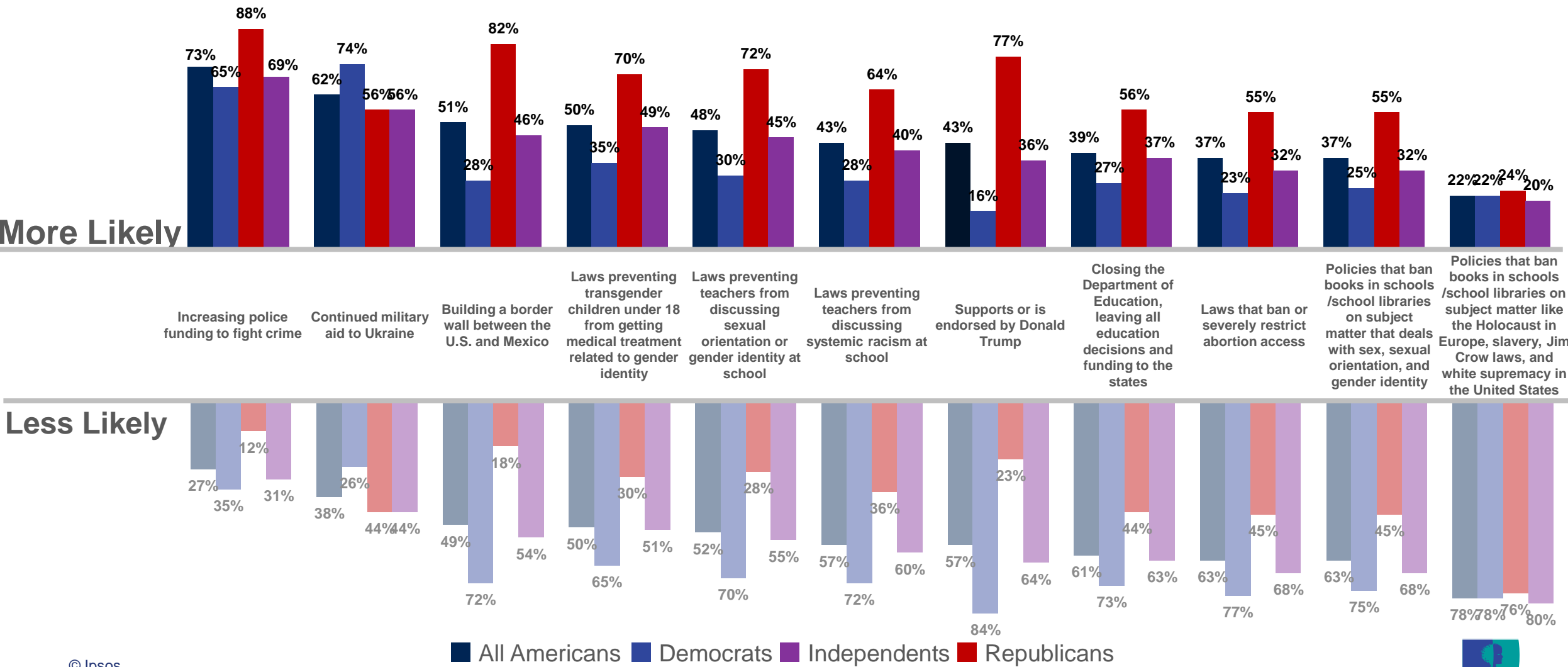
The Environment



Gun Violence/Gun Control

# Crime, aid to Ukraine, and a border wall are issues which Americans are most likely to support a candidate over

More or less likely to support a candidate who supports/does the following...

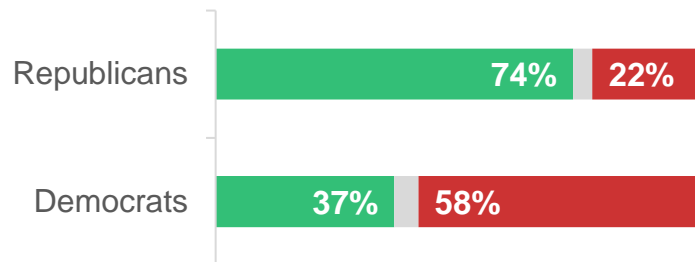


# Two years after 2020 election, trust in elections still low among Republicans

Please indicate how much you agree or disagree with the following statements.

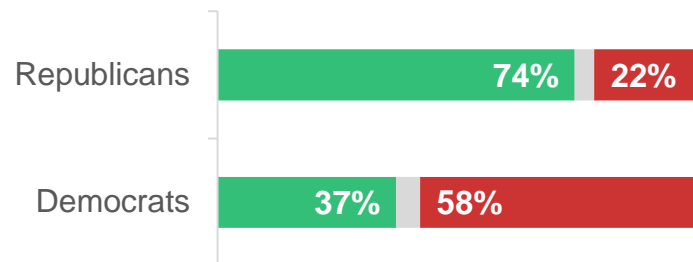
■ Total agree ■ Total disagree ■ Not sure

I think voter fraud is a widespread problem



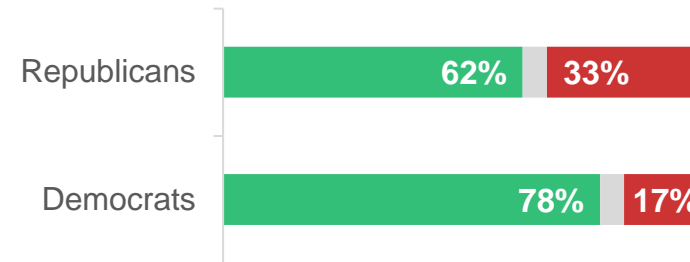
**3** in **4** Republicans said voter fraud is a widespread problem compared to **1** in **3** Democrats

I am concerned that the election is rigged



**2** in **3** Republicans said they are concerned the election is rigged, compared to **1** in **3** Democrats

I trust election officials in my county or town to do their job honestly

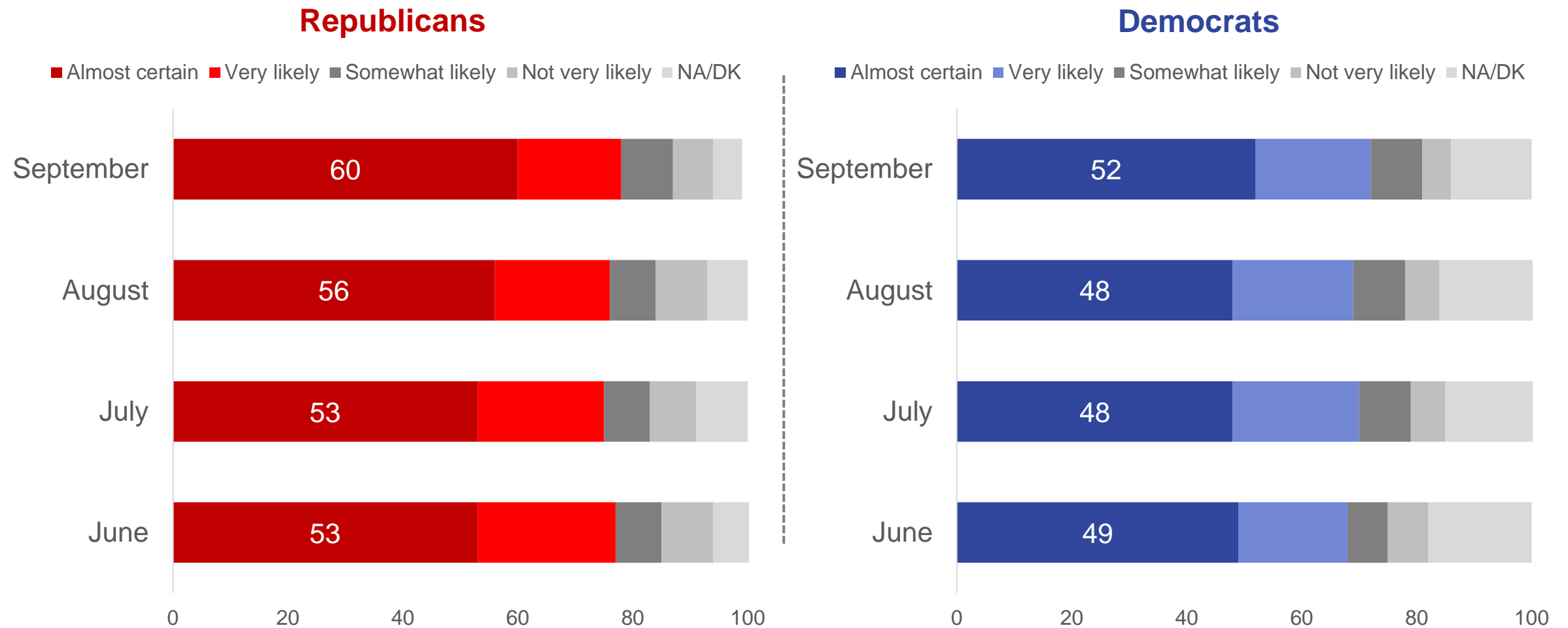


**1** in **3** Republicans said they do not trust election officials to do their job honestly, compared to **2** in **5** Democrats



# Republicans maintain an enthusiasm advantage

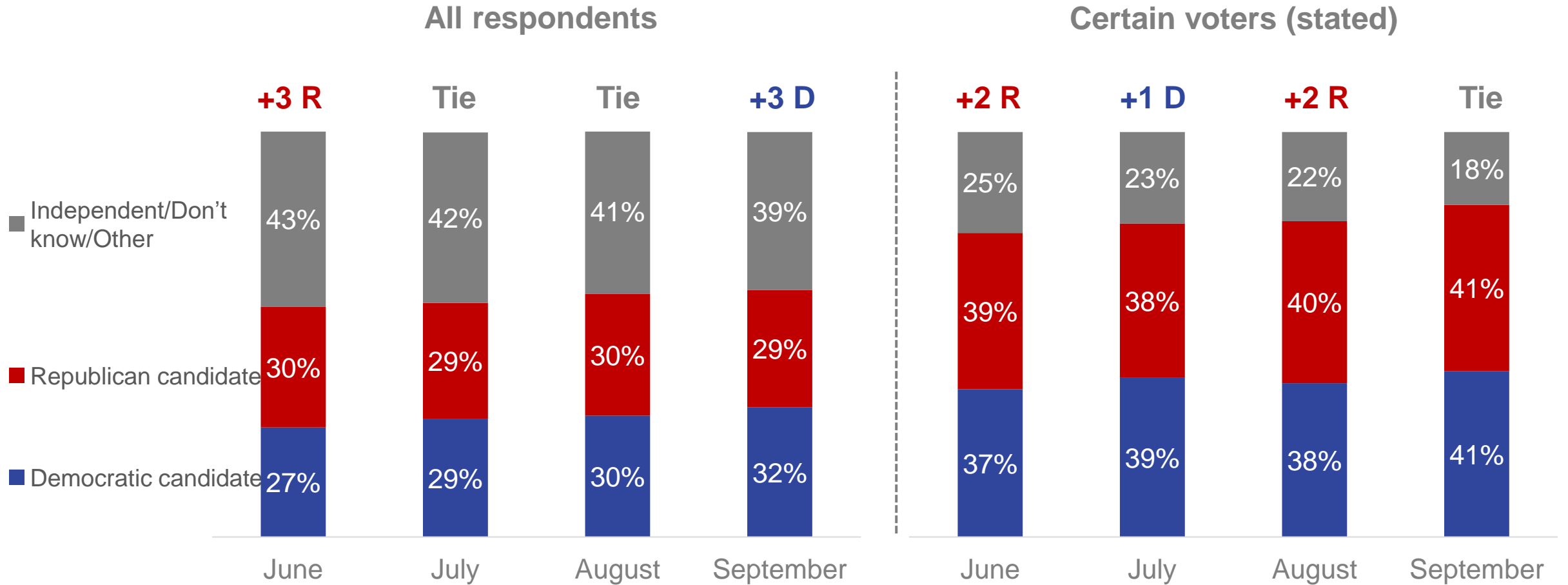
How likely, if at all, are you to vote in the 2022 midterm elections?



# Generic House ballot resetting to baseline

If you do vote in the 2022 midterm congressional elections, how would you vote?

*Same respondents tracked in each wave*



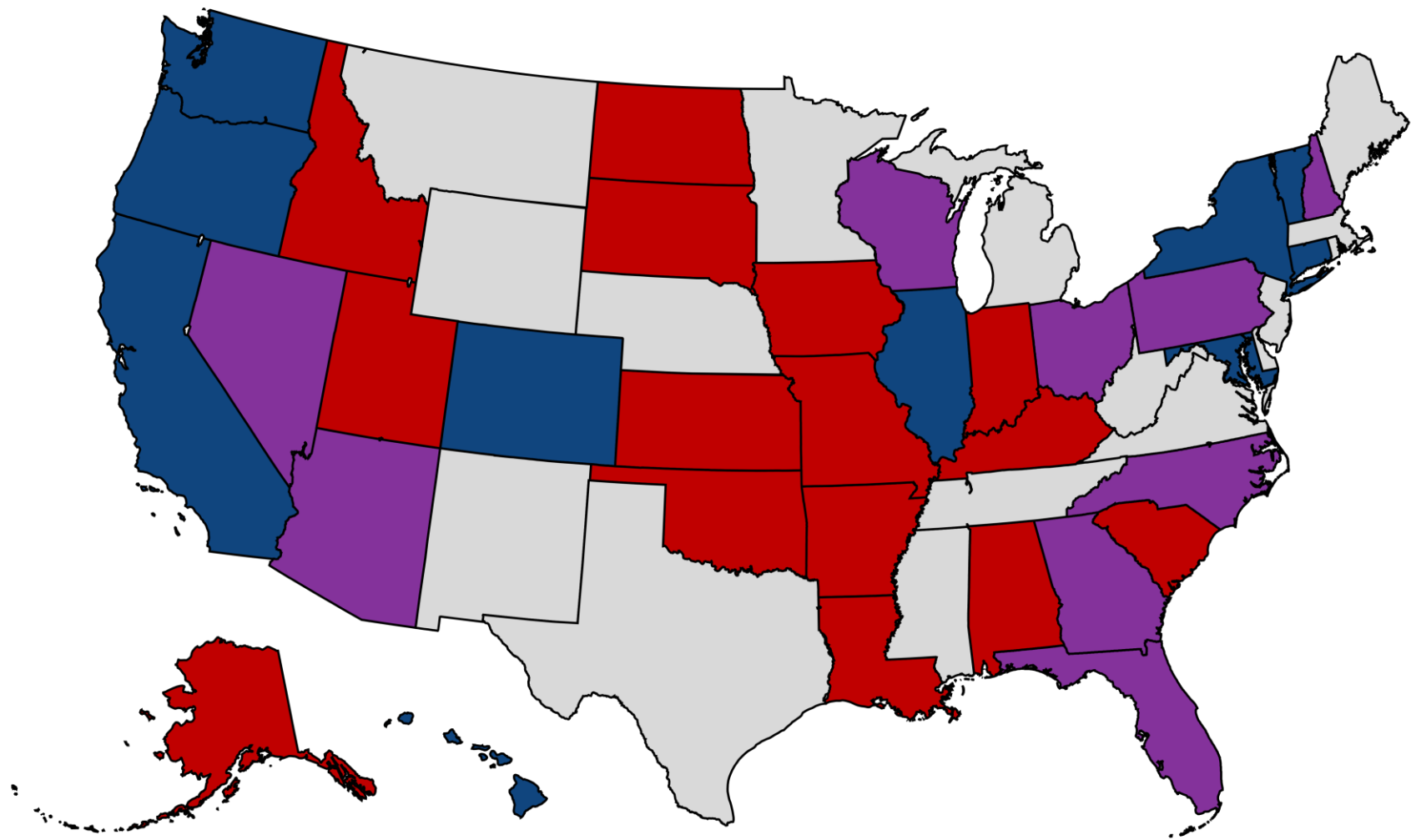
# House of Representatives still looks likely to go GOP

<u>Outlet</u>	<u>Control</u>	<u>Democrat Seats</u>	<u>Republican Seats</u>	<u>Tossup seats</u>	<u>Type</u>
FiveThirtyEight	Likely R	208	214	13	Model
Cook Political Report	Likely R	192	212	31	Expert
Inside Elections	Likely R	206	211	17	Expert
Sabato's Crystal Ball	Likely R	196	215	24	Expert
Politico	Likely R	196	212	27	Hybrid
Real Clear Politics	Likely R	185	218	32	Hybrid
Fox	Likely R	189	216	30	Hybrid
Decision Desk HQ	Likely R	199	223	13	Hybrid
The Economist	Likely R	204	210	21	Hybrid
<b>Average</b>	<b>Likely R</b>	<b>197</b>	<b>214</b>	<b>23</b>	

*218 for majority*

# Senate battlegrounds expand

- Toss-ups
- Likely Democratic win
- Likely Republican win



N/A

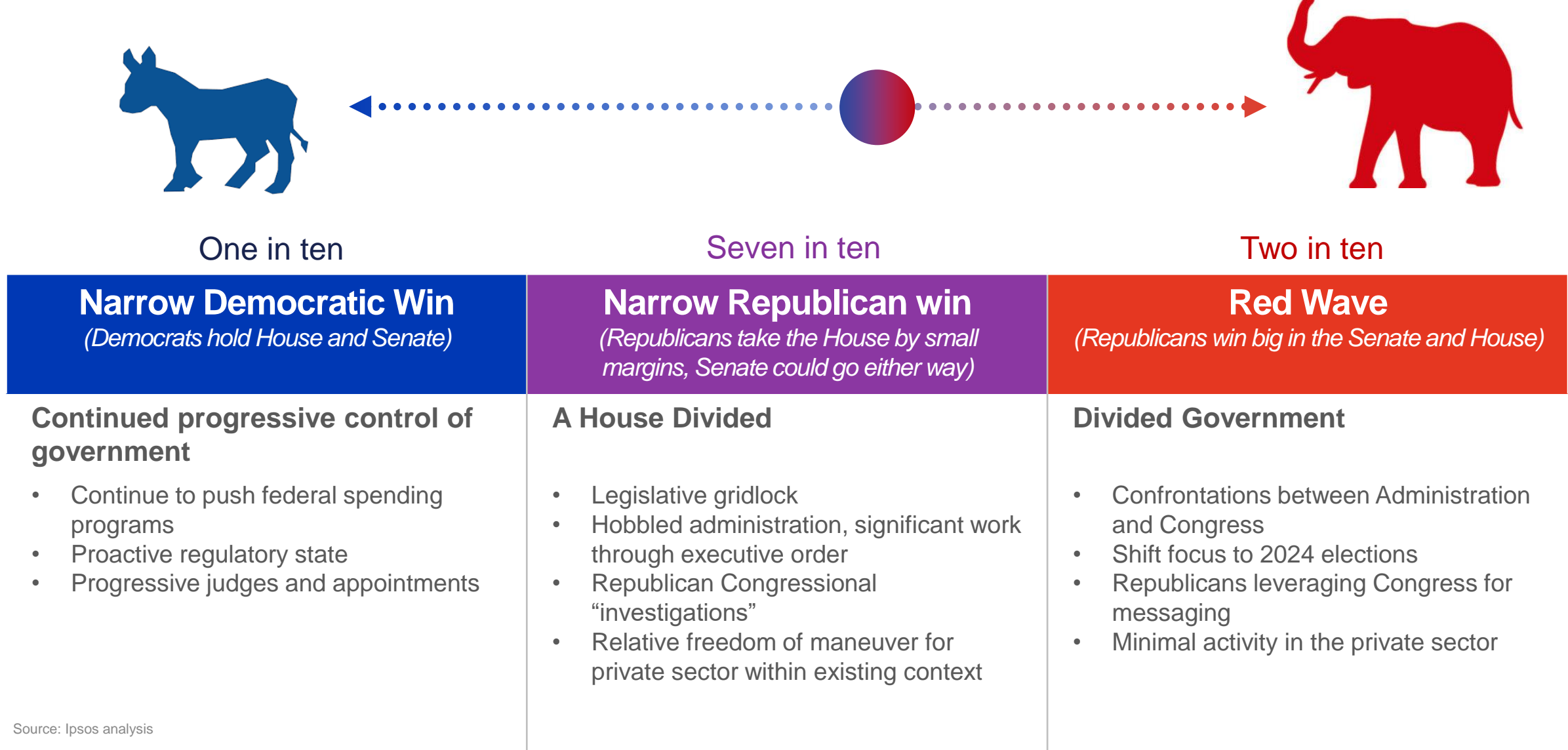
# Key Senate Races Looking Surprising for Dems

<u>State</u>	<u>Democrat</u>	<u>Republican</u>	<u>538</u>	<u>RCP</u>	<u>Experts</u>
Arizona	Mark Kelly (i)	Blake Masters	+6 D	+6 D	Tossup/Lean D
Florida	Val Demings	Marco Rubio (i)	+7 R	+3 R	Likely R
Georgia	Raphael Warnock (i)	Herschel Walker	+1 D	Tie	Tossup
Nevada	Catherine Cortez Masto (i)	Adam Laxalt	+1 D	+2 R	Tossup
New Hampshire	Maggie Hassan (i)	Donald Bolduc	+8 D	+8 D	Lean D
North Carolina	Cheri Beasley	Ted Budd	+2 R	+ 2 R	Tossup/Lean R
Ohio	Tim Ryan	J.D. Vance	+4 R	+1 R	Lean/Likely R
Pennsylvania	John Fetterman	Mehmet Oz	+5 D	+5 D	Tossup
Wisconsin	Mandela Barnes	Ron Johnson (i)	+2 R	+2 R	Tossup/Lean R

# Governor's races are a mix

<u>State</u>	<u>Democrat</u>	<u>Republican</u>	<u>538</u>	<u>RCP</u>	<u>Experts</u>
Arizona	Katie Hobbs	Kari Lake	Tie	+1 R	Tossup
Florida	Charlie Crist	Ron DeSantis (i)	+10 R	+5 R	Likely R
Georgia	Stacey Abrams	Brian Kemp (i)	+6 R	+7 R	Likely R
Kansas	Laura Kelly (i)	Derek Schmidt	+3 D	+2 D	Tossup
Maine	Janet Mills (i)	Paul LePage	+9 D	+7 D	Likely D
Michigan	Gretchen Whitmer (i)	Tudor Dixon	+10 D	+10 D	Likely D
Minnesota	Tim Walz (i)	Scott Jensen	+11 D	+5 D	Likely D
Nevada	Steve Sisolak (i)	Joe Lombardo	+3 D	+2 R	Tossup
Pennsylvania	Josh Shapiro	Doug Mastriano	+8 D	+9 D	Likely D
Texas	Beto O'Rourke	Greg Abbott (i)	+11 R	+8 R	Likely R
Wisconsin	Tony Evers (i)	Tim Michels	+2 D	+2 D	Tossup

# Potential outcomes for 2022



Source: Ipsos analysis

# THANK YOU!

## Questions?



# Ipsos Resources

- Ipsos public polling: <https://www.ipsos.com/en-us/news-and-polls/news>
- Axios-Ipsos Coronavirus Index
- FiveThirtyEight/Ipsos Midterm Election Tracking
- Reuters/Ipsos Public Opinion Partnership
- IpsosGlobalIndicators.com
- Ipsos Coronavirus Consumer Tracker: <https://www.ipsos.com/en-us/consumer-behavior-time-covid-19>
- Ipsos-Forbes Advisor U.S. Consumer Confidence Tracker: <https://www.ipsos.com/en-us/news-polls/Ipsos-Forbes-Advisor-Tracker>
- *Week in Review*– Weekly Ipsos Thought Leadership

# About Ipsos

---

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP  
**[www.ipsos.com](http://www.ipsos.com)**

# Game Changers

---

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.  
Ultimately, success comes down to a simple truth:  
**You act better when you are sure.**