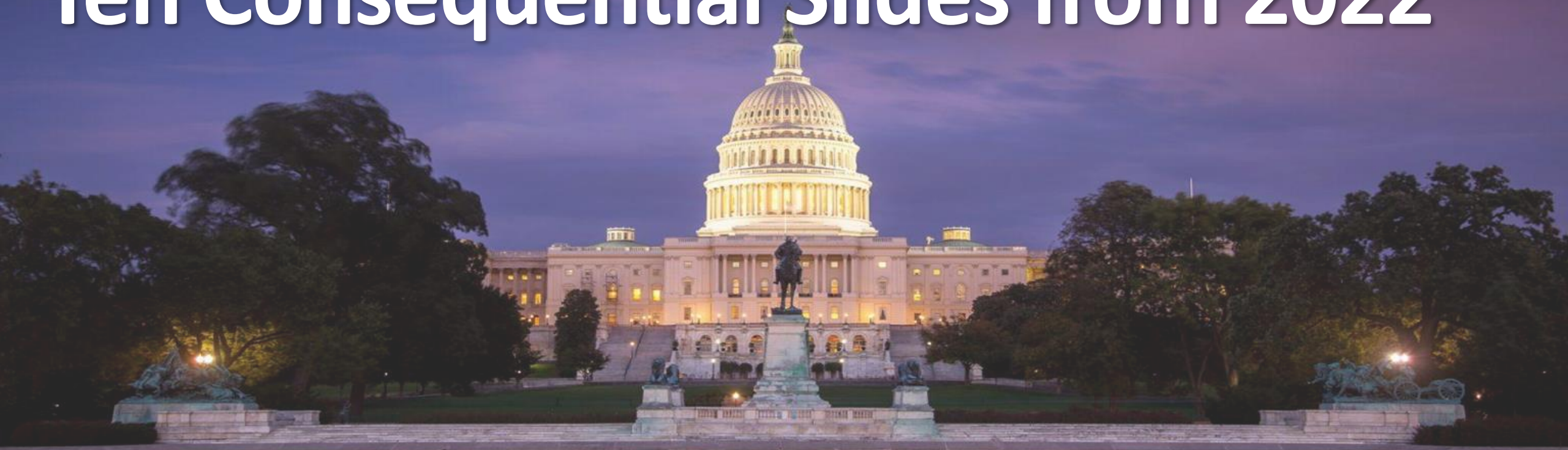


Ten Consequential Slides from 2022



Bill McInturff, Partner

1

There is trend and then there is *trend!*

The University of Michigan's National Consumer Sentiment Index has been with us since the 1950s. In seven decades, they measured the lowest consumer confidence ever this June of 50.0 and was under 60.0 for a record eight months in a row.

The University of Michigan's National Consumer Sentiment Index (MCSI) was a record low in 2022.

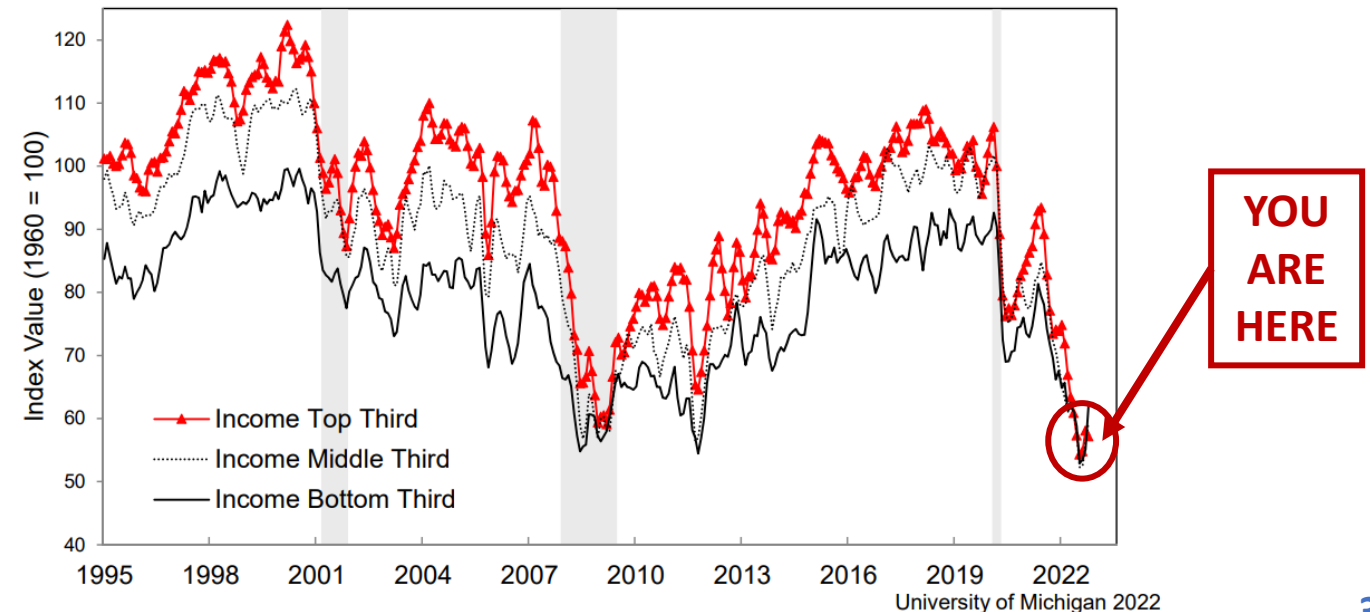
Michigan Consumer Sentiment Index Report

January 2020	99.8
January 2021	79.0
January 2022	67.2
May 2022	58.4
June 2022	Lowest Ever 50.0
July – December 2022	<i>Under 60</i>

Key 2022 Trends in MCSI:

- Hit its lowest **EVER** point in June 2022.
- Under 60 for record eight months in a row.
- Expectations lower than current condition.
- Inflation cited as a driver of lower ratings.

The Index of Consumer Sentiment
(3 Month Moving Average)



2

America the divided.

Our extreme political polarization has led people to believe our national government can no longer solve the major issues facing the country.

A Consensus on Division

Which of the following statements is closer to your own view?

Strong partisan differences have always made America dynamic. Yet in tough times we always come together as a nation--to solve our greatest challenges--and we will continue to do so.

America has become so deeply divided and politically polarized that our national government can no longer solve the major issues facing our country--and these differences will only continue to grow.

Net Difference

May 2010*

January 2022

50%

27%

45%

70%

+5%

-43%

** May 2010 survey conducted by Marttila Strategies for IMS Health.*

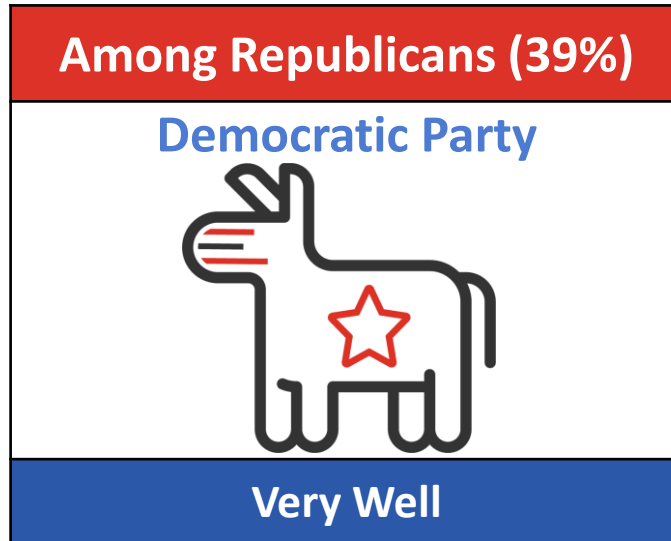
3

Just how bad is our political polarization?

Roughly eight out of ten partisans believe the agenda of the other party poses a threat that if not stopped will destroy America as we know it.

The Democratic/Republican party agenda poses a threat that if not stopped will destroy America

*The **Democratic Party's** agenda poses a threat that if not stopped will destroy America as we know it*

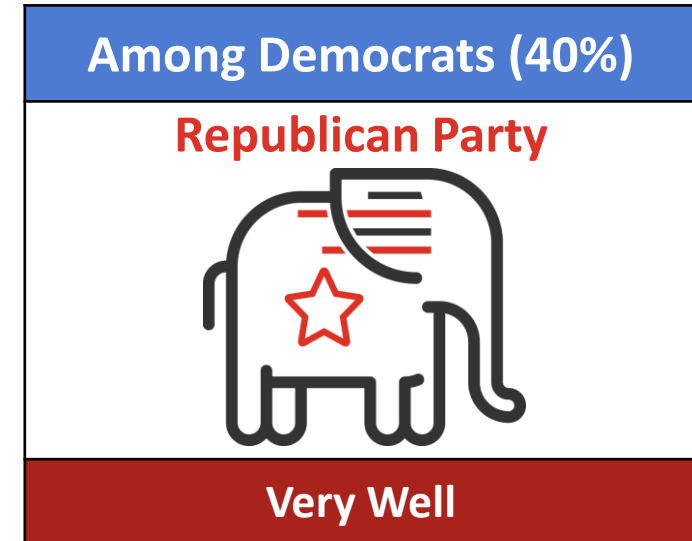


61%

Total Well

79%

*The **Republican Party's** agenda poses a threat that if not stopped will destroy America as we know it*



57%

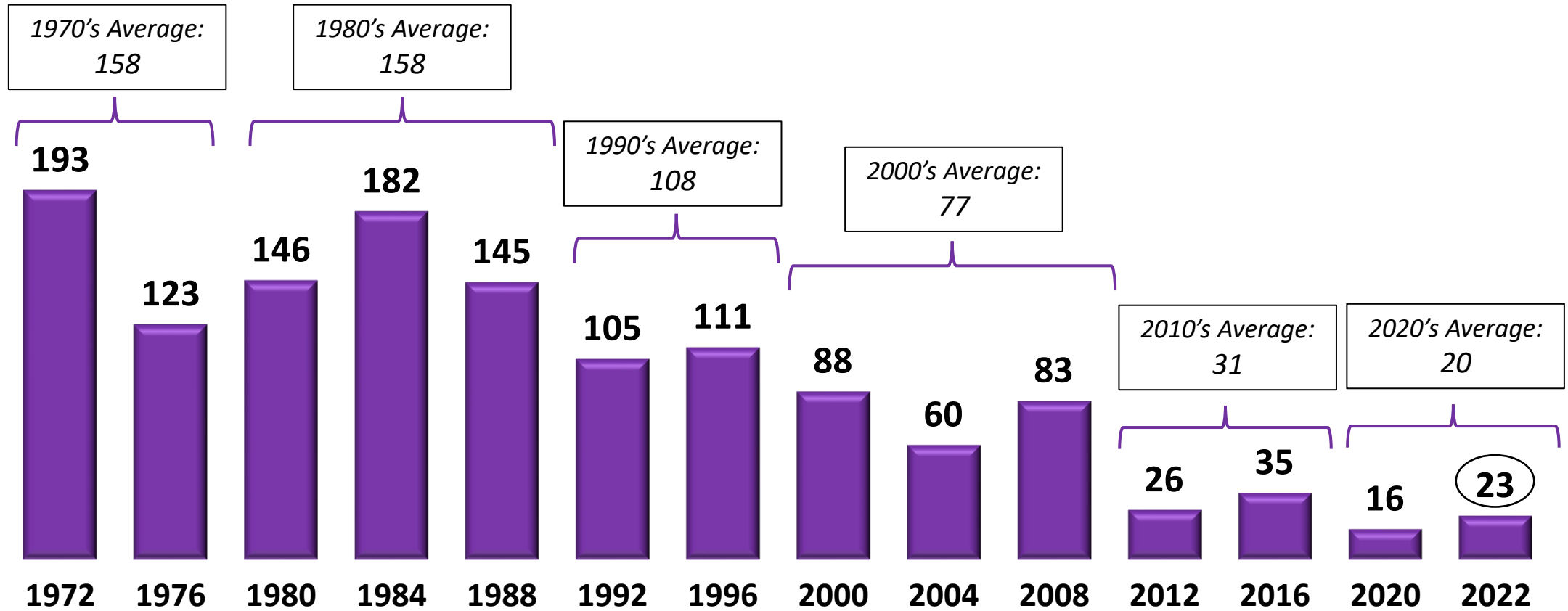
Total Well

81%

4

Underlying this extreme divide is the electoral reality — swing congressional seats have essentially disappeared. Members of Congress have a lot more incentive to placate their partisan political base than work across the aisle on meaningful compromise.

Districts That Voted for a Presidential Nominee From One Party and a Member of Congress From the Other



Note: Because of missing data, 1984 figures exclude Ohio's 21 House districts, and 1988 figures exclude Mississippi's five House districts. In 2000, one district was R-presidential but elected an Independent to the House; one other districts was D-presidential but elected an Independent to the House.

Sources: Pew Research Center

5

Another change impacting our politics is the shift in the Republican coalition. Over a decade plus, the composition of the Republican party has moved decisively to be comprised of non-college White voters. These voters and their concerns will be what underlies the policy dynamics of the new Republican majority in the House of Representatives.

The composition of the Republican party has shifted significantly over the decade to non-college Whites.



Self-Described Republicans by Ethnicity/Education

	2012 Merge	2014 Merge	2016 Merge	2018 Merge	2020 Merge	2022 Merge
Total Republican Non-College Whites	48%	49%	56%	59%	58%	62%
Total Republican College+ Whites	40%	38%	33%	29%	28%	25%
Republicans of Color	12%	13%	11%	12%	14%	12%

6

The issue of abortion helped transform the 2022 election. Thirty plus years of trend data was reversed within a week of the leak of the Dobbs decision in May. Single-issue abortion voters were no longer pro-life conservative Republicans, but pro-choice liberal Democrats.

Single Issue Abortion Voters Top Subgroups: A total flip in the coalition focused on this issue.



January 2020

Prefer GOP Controlled Congress	Prefer Dem Controlled Congress
57%	37%

May 2022

Prefer GOP Controlled Congress	Prefer Dem Controlled Congress
34%	63%

Top Demographic Subgroups Abortion

- ✓ Conservatives
- ✓ Watch Fox News
- ✓ Trump: Core Supporters
- ✓ Total Republicans

Top Demographic Subgroups Abortion

- ✓ Women College+
- ✓ Total Democrats
- ✓ Post-Graduates
- ✓ 2020 Vote: Biden
- ✓ Liberal



Some people feel so strongly about an issue that they will vote for or against a candidate on that basis regardless of the candidate's stand on most other issues. I'm going to read you a list of issues and ask whether you consider any one issue so important that you would vote for or against a candidate solely on that basis. If you do not feel strongly enough about any of the issues to determine your vote, please just say so....

7

Pre-Dobbs, Republicans enjoyed a double-digit advantage on voter intensity. The week after Dobbs, that advantage was cut in half. By the weekend before the election, partisans of both parties were equally likely to say they were “very interested” in the election with self-described interest very high on both sides.

Tracking Very Interested in the Election *

National Data/NBCWSJ & NBC News

			<i>Net Difference</i>	<i>Pick up House Seats</i>
2006 (October)	56%	69%	+13%	+30
2010 (Merge)	66%	49%	+17%	+63
2014 (Merge)	59%	48%	+11%	+13
2018 (Merge)	57%	66%	+9%	+40
January 2022	61%	47%	+14%	+9
March 2022	67%	50%	+17%	
May 2022	69%	61%	+8%	
August 2022	68%	66%	+2%	
September 2022	69%	66%	+3%	
October 2022	78%	69%	+9%	
November 2022	73%	73%	-0-	

On a scale of one to ten, with one meaning NOT AT ALL interested and ten meaning VERY INTERESTED, please tell me how interested you are in this year's elections? Of course, you can choose any number between one and ten.

*Percent 9 or 10 on a 1 to 10 scale

8

October data provided a cautionary signal for Republicans. In October of 2006 before Democrats recaptured the House, by a ten-point margin voters were more concerned maintaining a Republican majority would mean no change in current policies.

Instead, this past October by a two-point margin, voters told us they were more concerned Republicans would make the wrong kind of changes.

Despite the Republican edge this cycle, voters were nonetheless concerned about Republicans making the wrong kind of change.

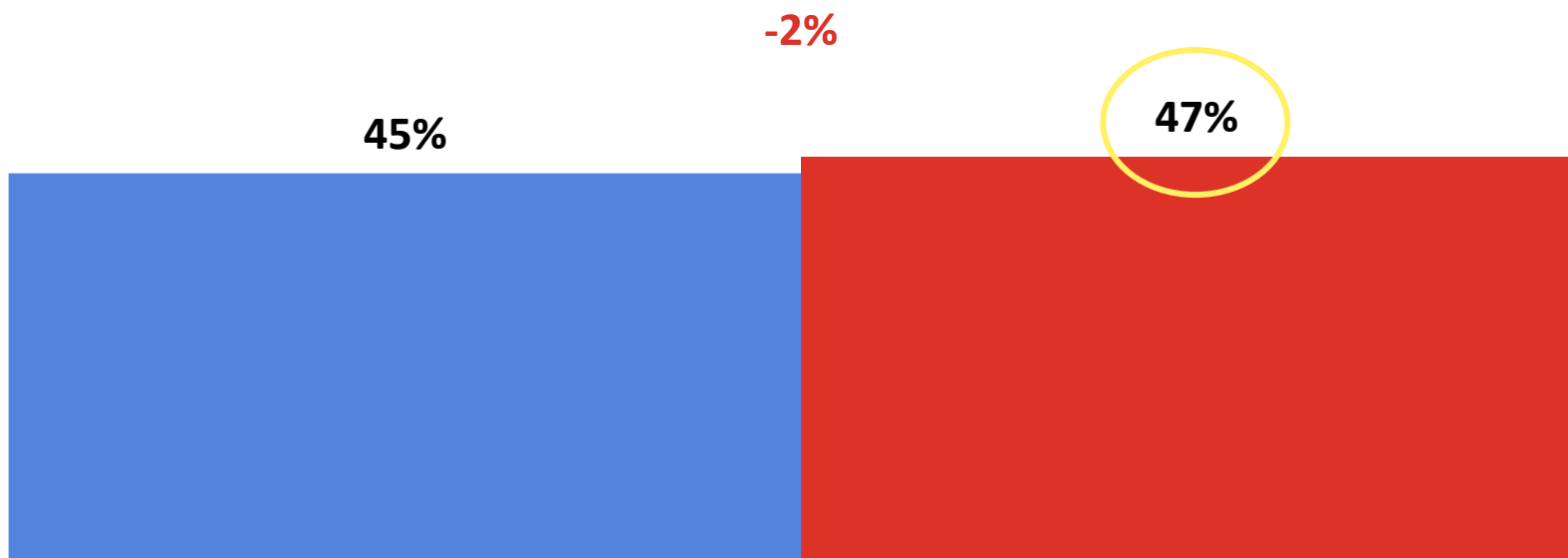


Which of the following represents the bigger concern to you regarding the results of this November's Congressional election?

The Democrats continue to control Congress, and there is not enough change in current policies.

...or...

The Republicans take over control of Congress, and they make the wrong kinds of changes in current policies.



**NBC News Poll, November 3-5, 2022*

9

There is an easy way to measure the Republican underperformance in the race for Congress. Republicans won the national vote by 2.8% but captured only 222 seats. A similar vote margin in 2004 produced 10 additional seats.

Republicans carried the national vote cast for Congress but underperformed the number of seats that margin could have produced.

Year	Actual Vote (GOP Margin)	GOP Seats Gain/Loss	GOP Seats After Election
1994	+6.8%	+54 Seats	230 Seats
2010	+6.6%	+60 Seats	242 Seats
2014	+5.8%	+13 Seats	247 Seats
2002	+4.6%	+8 Seats	229 Seats
2004	+2.6%	+3 Seats	232 Seats
2016	+1.0%	-6 Seats	241 Seats
1998	+0.9%	-5 Seats	223 Seats
2000	+0.3%	-2 Seats	221 Seats
2022	+2.8%	+9 Seats	222 Seats

10

Keep betting on change!

For the first time in our history, four successive presidents had lost control of at least one chamber of Congress. Make it five presidents now. Since 2000, we have had 12 election cycles. We have had only two cycles where we have not seen a party change in the presidency, Senate or House.

Bet on change!

Change in Control of House, Senate and/or White House 1960-2022





PUBLIC OPINION STRATEGIES

turning questions into answers

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