



NORTH STAR OPINION RESEARCH

Outlook for the 2018 Midterm Elections

2018 ASTA Regulatory Workshop

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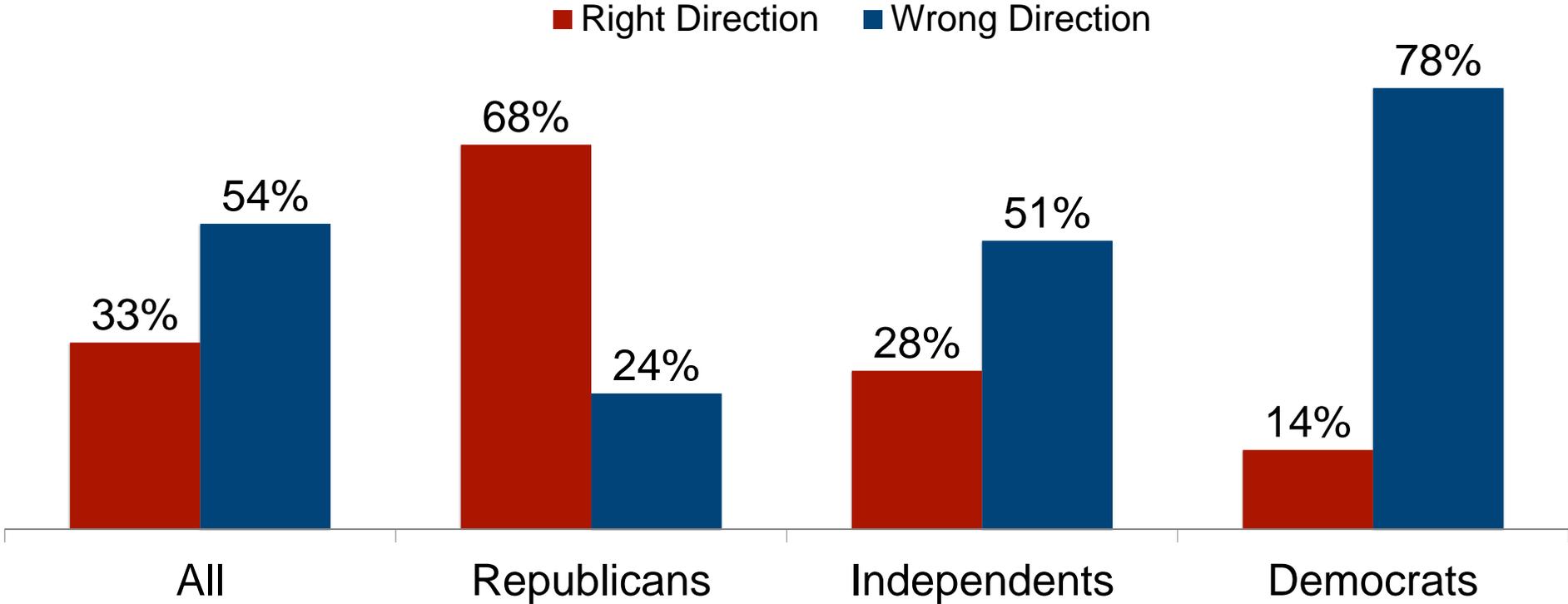
Where Do We Stand Today?

Policy-wise, the Trump Administration's achievements looks like a Republican wish list:

- **Supreme Court Justices Neil Gorsuch and Brett Kavanaugh**
- **Largest tax cuts in 3 decades**
- **Repeal of the individual mandate in ObamaCare**
- **Massive deregulation across industries**
- **Strong economy with historically-low unemployment**
- **Approval of the Keystone XL Pipeline**
- **Approval of oil drilling in ANWR**
- **Slowed illegal immigration**
- **ISIS on the ropes**
- **U.S. embassy in Israel to move to Jerusalem**
- **A frothing-mad national media**

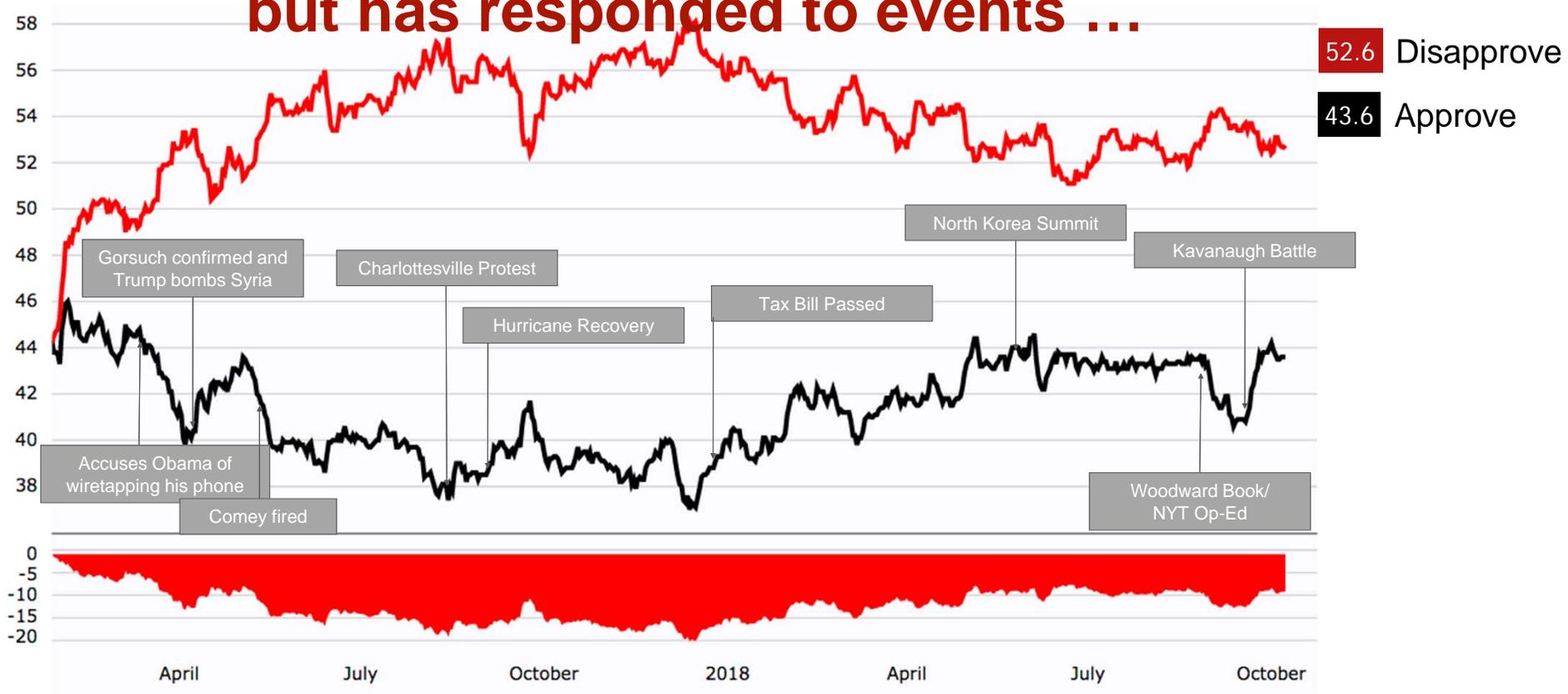
Which is why Republicans think things are going great! But independents and Democrats strongly disagree.

Would you say things in this country today are generally headed in the right direction, or off on the wrong track?



Source: The Economist/YouGov

Trump's job approval has been poor since his inauguration, but has responded to events ...



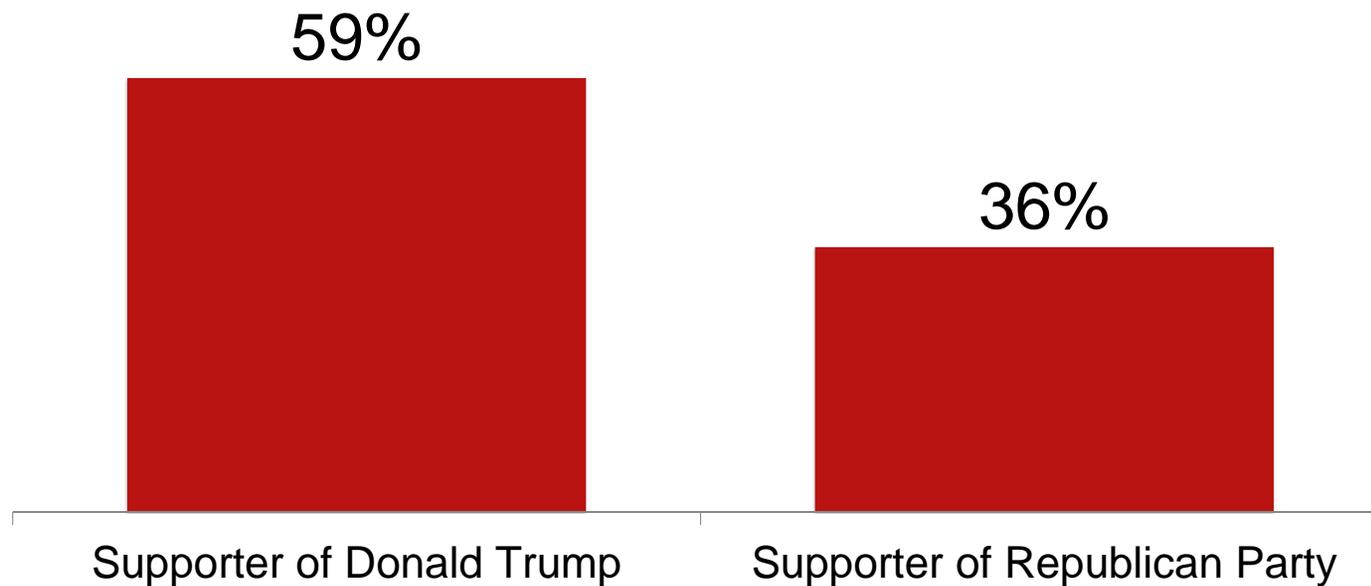
Source: Real Clear Politics



A Polarized Republican Party

There is a very real division among “Trump” Republicans and “Establishment” Republicans that is changing the party in a fundamental way.

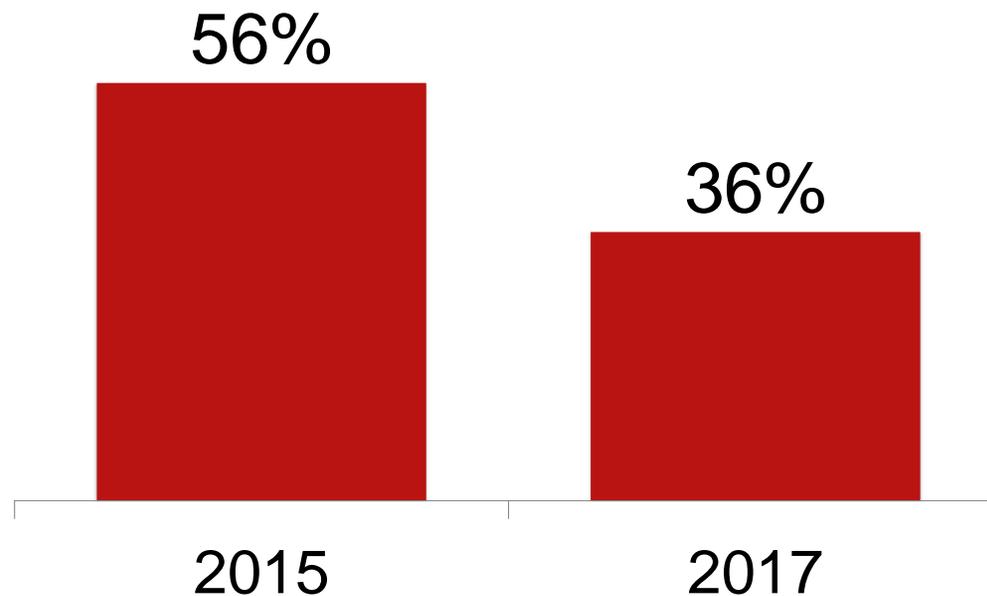
Do you consider yourself to be more of a supporter of Donald Trump or more of a supporter of the Republican Party?



Source: WSJ/NBC News

**In 2015, a majority of Republicans thought free trade was good for the U.S.
Today only about one-third do.**

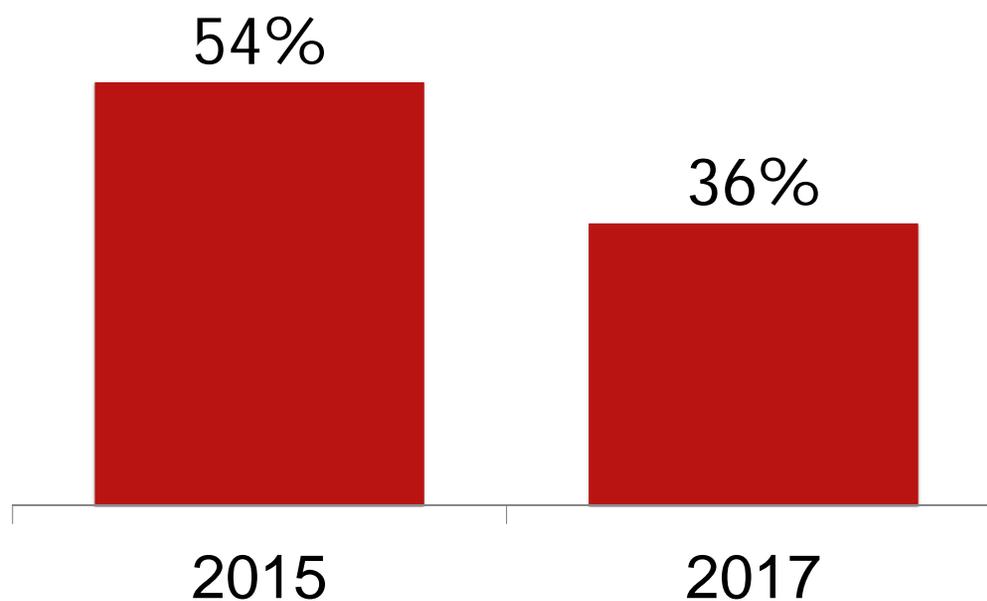
In general, do you think that free trade agreements between the U.S. and other countries have been a good thing or a bad thing for the United States?



Source: Pew Research

In 2015, a majority of Republicans said colleges and universities had a positive effect on the country. Today only one-third do.

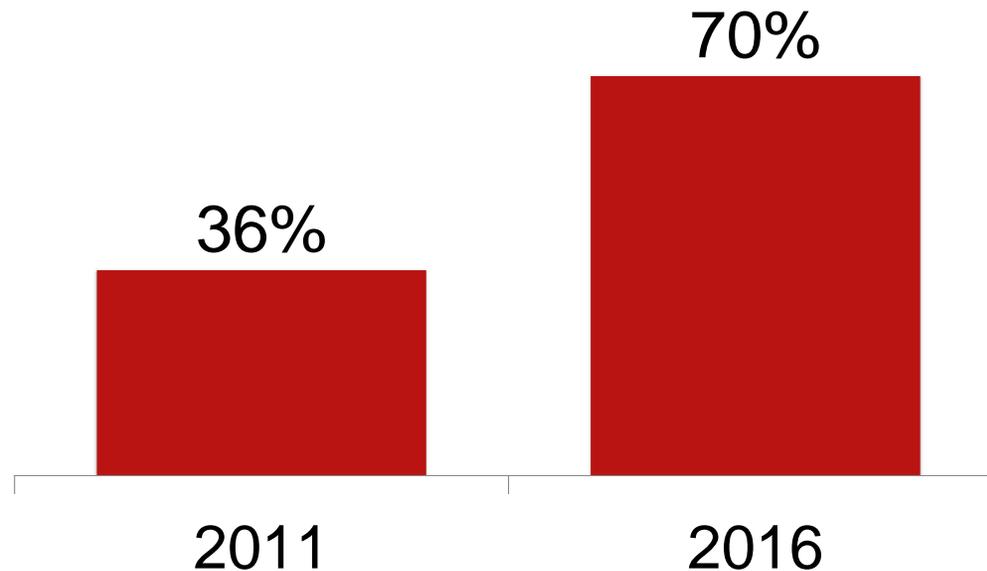
Overall do you think colleges and universities are having a positive or negative effect on the way things are going in this country today?



Source: Pew Research

In 2011, only one-third of Republicans thought an elected official who commits immoral acts in private life could act ethically in public life. By 2016, over two-thirds did.

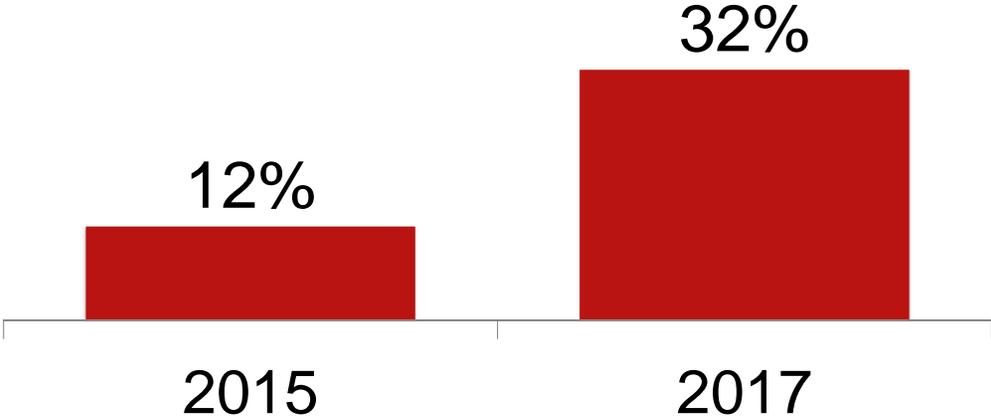
Do you think an elected official who commits an immoral act in their private life can still behave ethically and fulfill their duties in their public and professional life?



Source: PRRI/Brookings

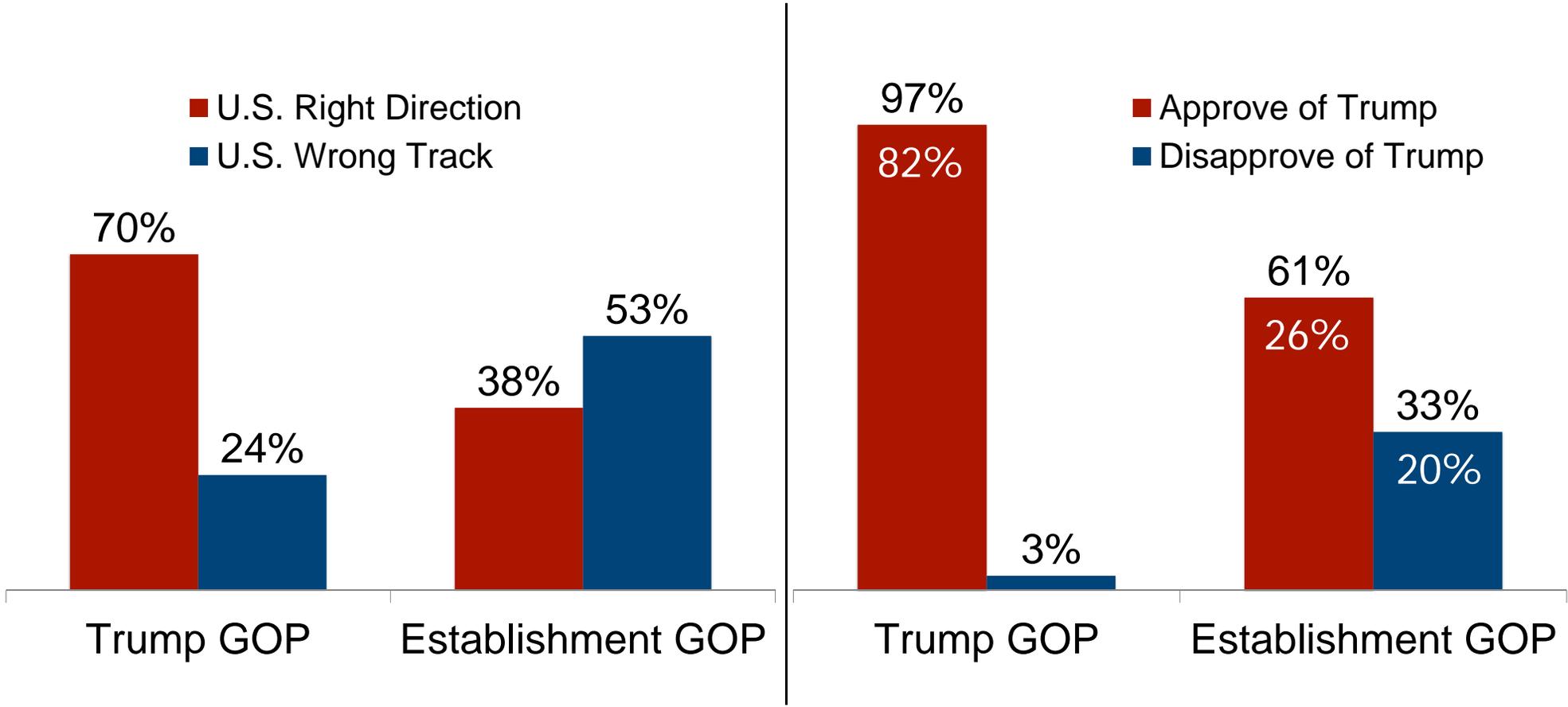
Republicans' favorable views of Vladimir Putin have almost tripled since 2015.

Do you have a favorable or unfavorable opinion of Russian President Vladimir Putin?



Source: Gallup

Differences between the party's two factions are stark, and difficult to reconcile.



Source: North Star Opinion Research

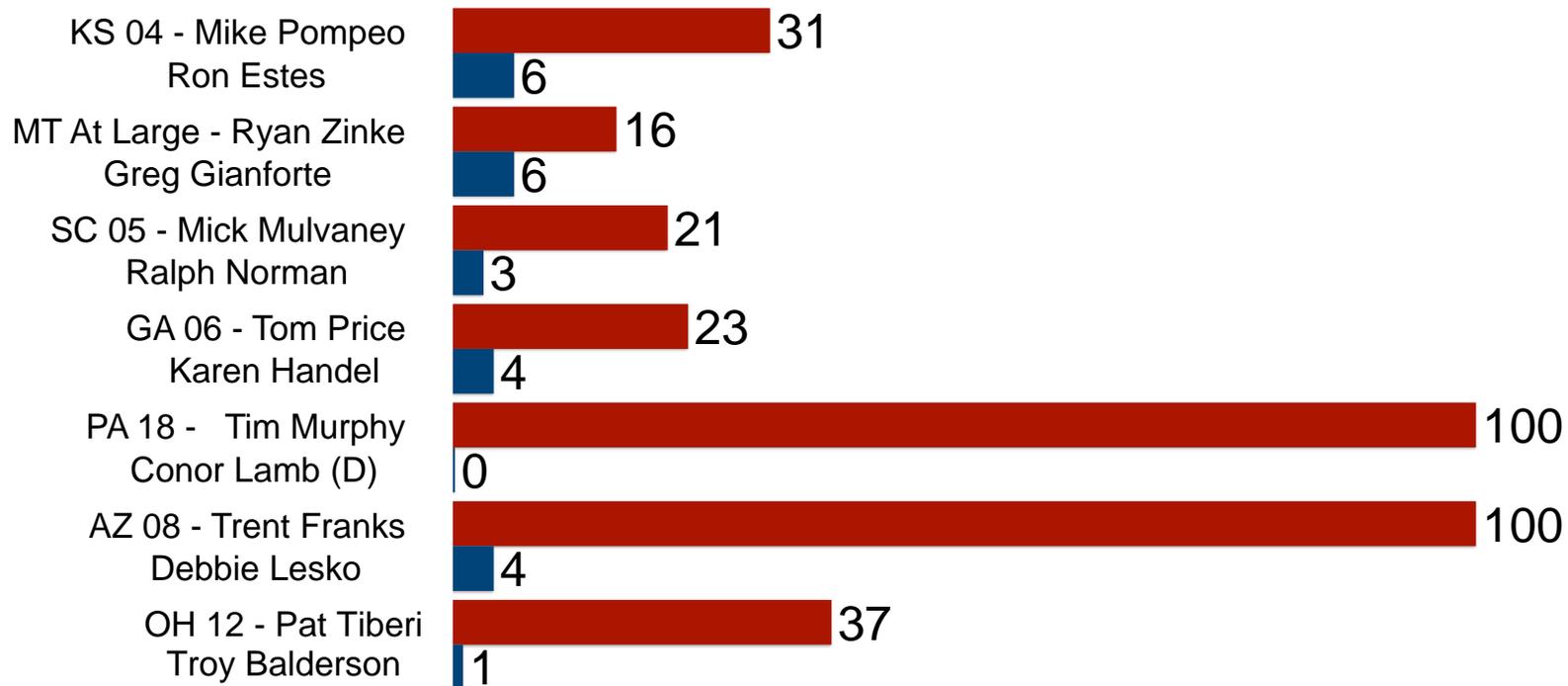


Canaries in the Coal Mine? The 2017-2018 Special Elections

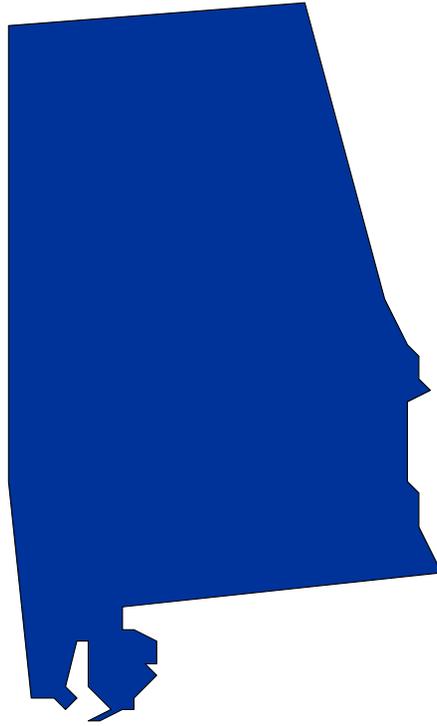
Republican performance in special House elections over the last 2 years has not been encouraging, even in victory:

■ 2016 General ■ 2017-18 Special

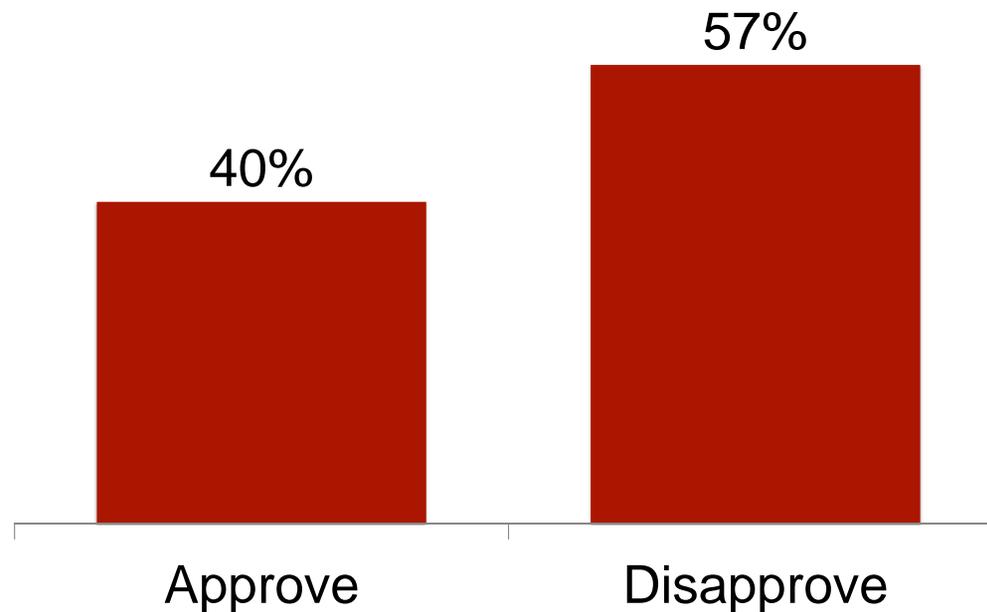
Margin of victory in percentage points:



And then there's this ...



Among Virginia voters, Trump's statewide job approval was only 40 percent on election day ...

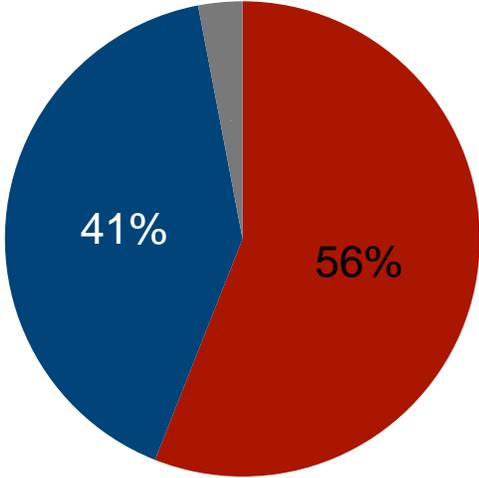


Source: Exit Polls

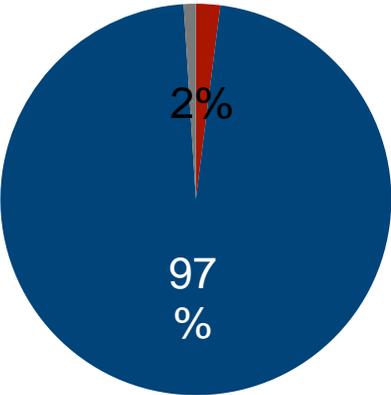
... and that is ultimately what decided the election for Ralph Northam.

■ Gillespie ■ Northam ■ Other

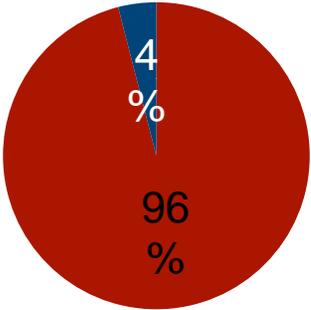
Trump Not a Factor in Vote
(47% of Voters)



Vote is Opposition to Trump
(34% of Voters)



Vote is Support for Trump
(17% of Voters)

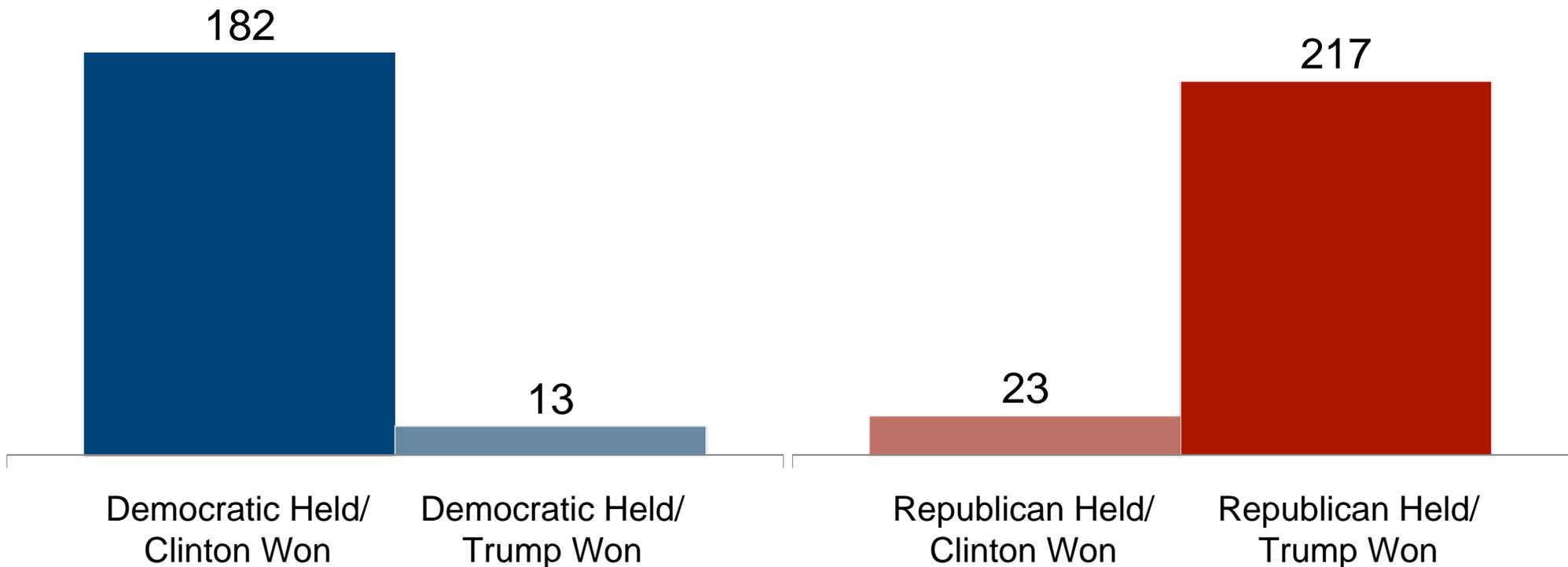


Source: Exit Polls

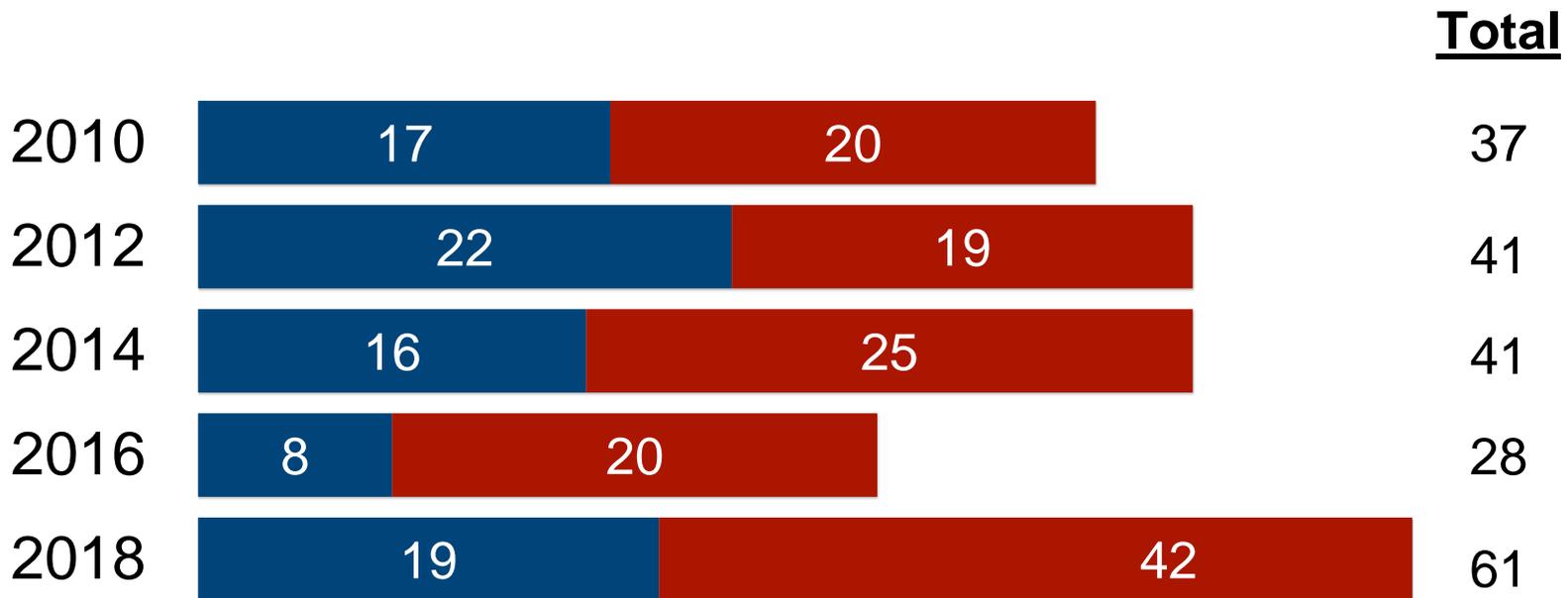


Outlook for the House and Senate in 2018

In the House, Republicans currently hold a 45-seat majority, so Democrats need to pick up 23 seats to take control.



Retirements and resignations have opened up a record number of House seats, disproportionately Republican.



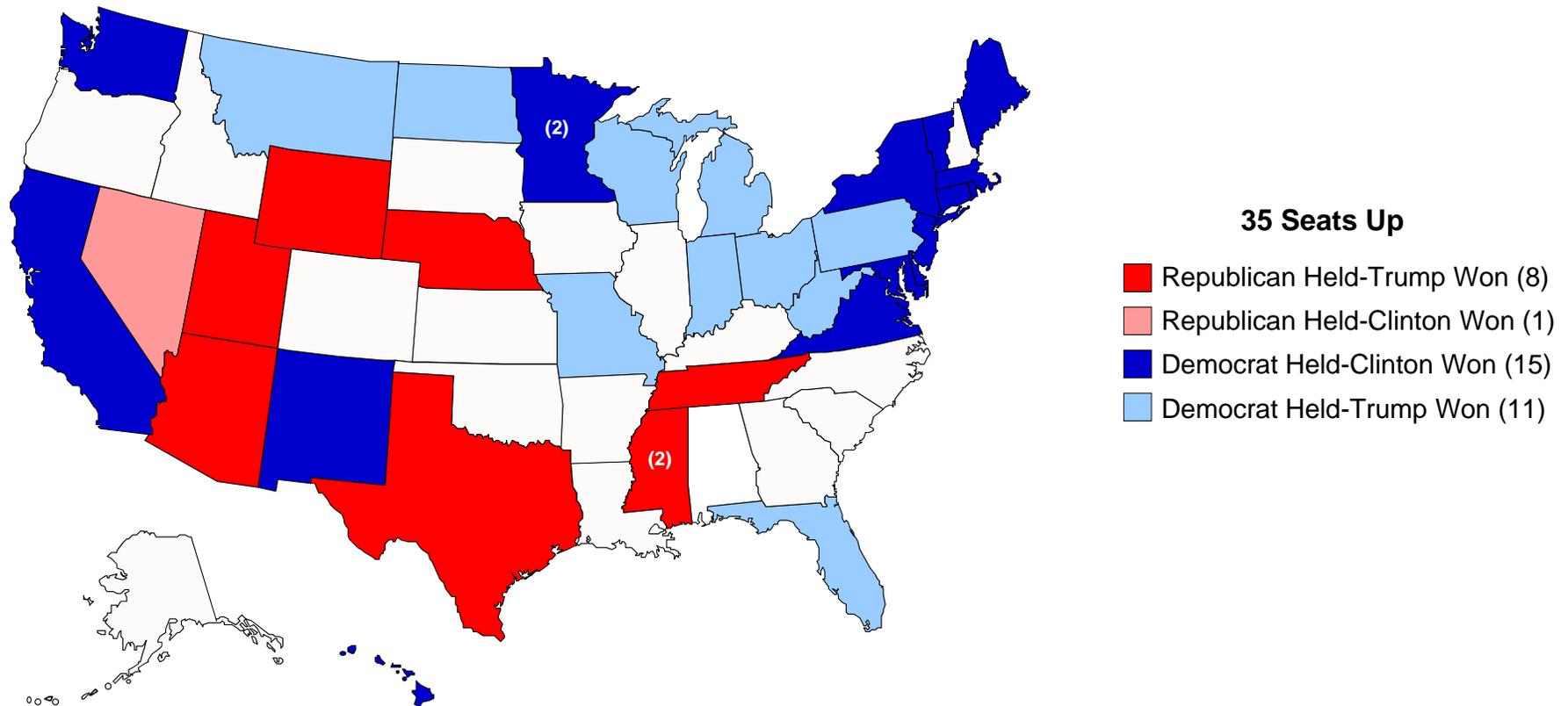
Of the 108 House seats deemed to be “competitive” by the Cook Political Report, 95 of them are currently held by Republicans.

31 of the competitive seats are deemed toss-ups, with 29 currently held by Republicans.

37 of the competitive seats are “lean Republican/Democrat,” with 36 currently held by Republicans.

And 15 seats currently held by Republicans are in the “lean or likely Democratic” category — twice the number seen in the Spring.

On the other hand, the 2018 Senate map strongly favors Republicans, making their 2-vote majority safer than it might appear.



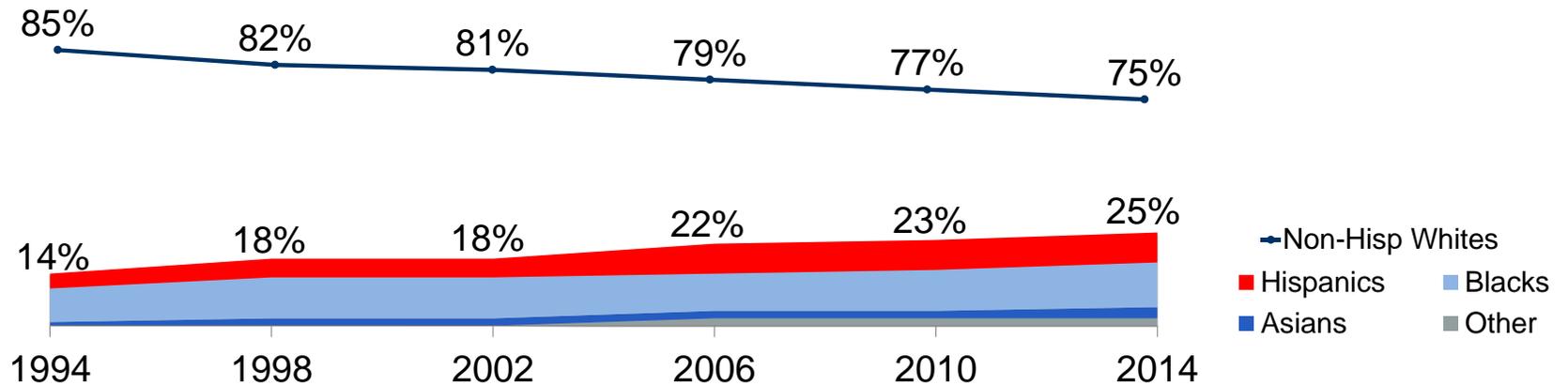
Of the 17 Senate seats deemed to be “competitive” by the Cook Political Report, 12 of them are currently held by Democrats.

9 seats are deemed toss-ups, including 5 currently held by Democrats (FL, IN, MO, ND, & WV) and 4 currently held by Republicans (AZ, NV, TN, & TX).

If Democrats lose even one of their incumbents, their path to a majority becomes extremely narrow.

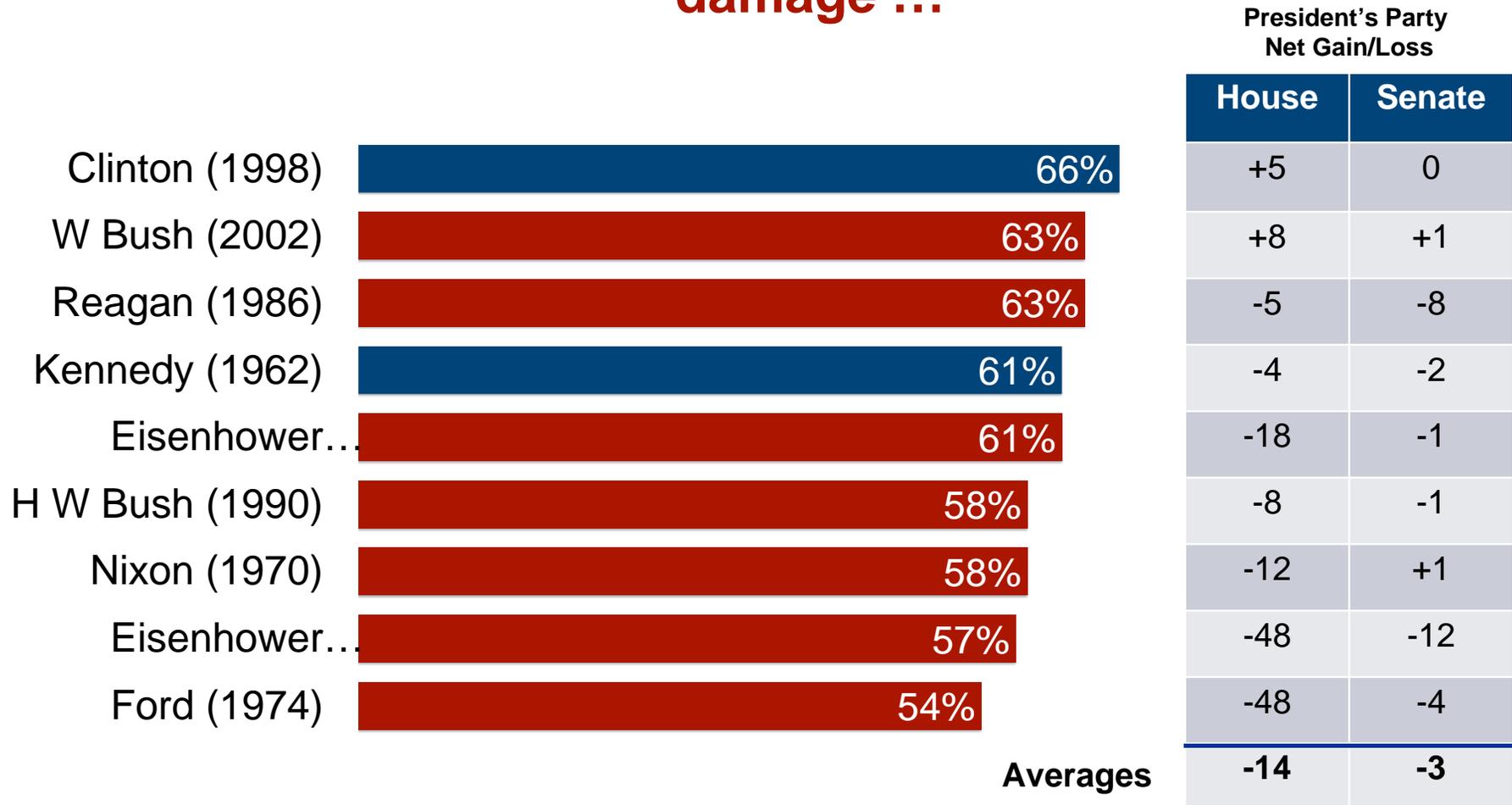
But a likely runoff in Mississippi is a potential wildcard.

Midterm electorates tend to be older and whiter, and thus more Republican. But the proportion of whites in midterm electorates is declining every election, and Democratic enthusiasm is through the roof.

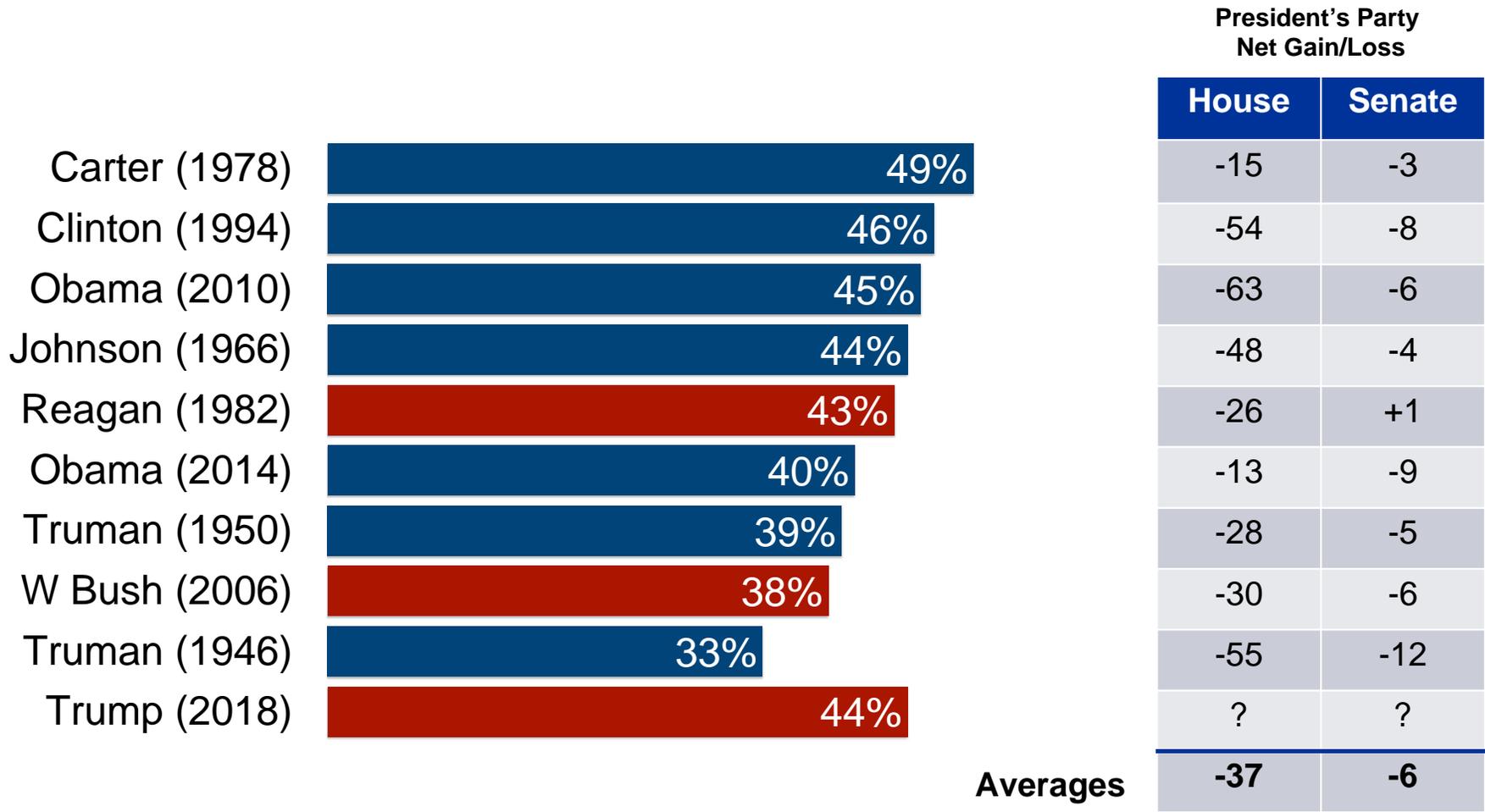


Source: Exit Polls

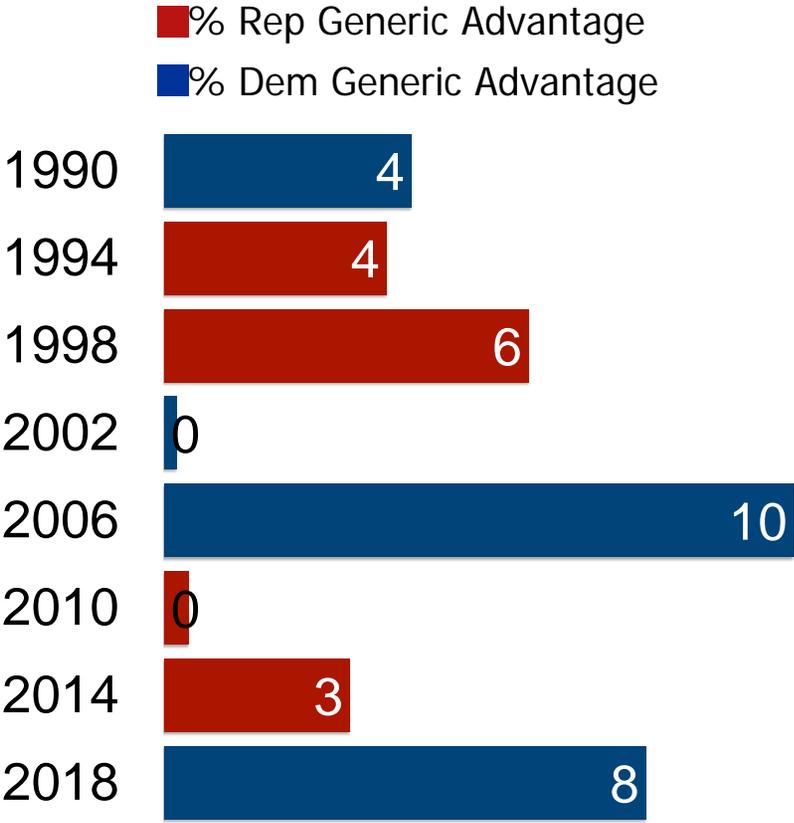
The in-party nearly always loses Congressional seats in midterm elections, but a good Presidential approval rating can mitigate the damage ...



... while a bad approval rating can be a harbinger of doom.



The current generic House ballot puts the Democrats in range for a takeover.



Rep Net Gain/Loss

House	Senate
-8	-1
+54	+8
-5	0
+8	+1
-30	-6
+63	+6
+13	+9
?	?

Source: NYT



So What's the Bottom Line?

- **Historical forces, an unpopular president, and a highly motivated base point to a good year for Democrats in the House.**
- **But a map with a big GOP-tilt makes a Democratic Senate less likely.**
- **Donald Trump will continue to dominate every news cycle, and be the central figure and most important issue in every campaign for House and Senate.**
- **But the candidates and campaigns will matter, and both parties are deeply divided and unpredictable.**
- **The Mueller Report, when it comes, may well be the spark that ignites the DC powder keg. And if the Democrats take over the House, their base will demand impeachment.**
- **But let's be honest: Who even knows what will happen tomorrow in this environment?**



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Questions?

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