



GPG 2020 Election Polling Update

October 30, 2020



The Latest

An unprecedented number of votes have already been cast before Election Day.

So far, **over 85 million votes have been cast in the 2020 election**, compared to **58.3 million total early ballots in 2016**.

In 2016, **nearly 137 million votes** were cast in total.
Analysts predict **a record-breaking 150 million votes will be cast this year**.

Notable states:



Florida:

35% of likely voters have already cast a ballot, according to polling.



N. Carolina:

Republicans are narrowing the gap in early voting.



Pennsylvania:

About 70% of pre-election votes have been cast by Democrats.



Michigan:

So far, Black voters make up 12% of voters, up from 8% at this time in 2016.



Arizona:

Slightly less than one-third of all registered voters have no party affiliation.

As Election Day approaches, COVID-19 cases are on the rise in 41 states, including in key battleground states Pres. Trump won in 2016.

Percent increase in the 7-day average of new cases on Oct. 20 and Oct. 27

Nationwide: +22%



Arizona
+16%



Florida
+21%



Ohio
+22%



Wisconsin
+23%

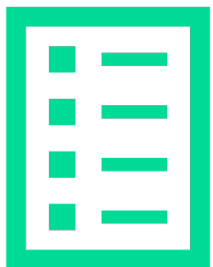


Michigan
+25%



Pennsylvania
+33%

51% of voters are confident in Joe Biden's ability to deal with the COVID-19 outbreak, compared to just 39% who are confident with Pres. Trump's ability to deal with it.



The Polling

Biden goes into the final weekend with a solid lead that is 6 points higher than Hillary Clinton's at this point in 2016.

6

Current National Average

Biden leads by 7 points.

Joe
Biden

51%

*Based on aggregated polling from
October 21- 28*

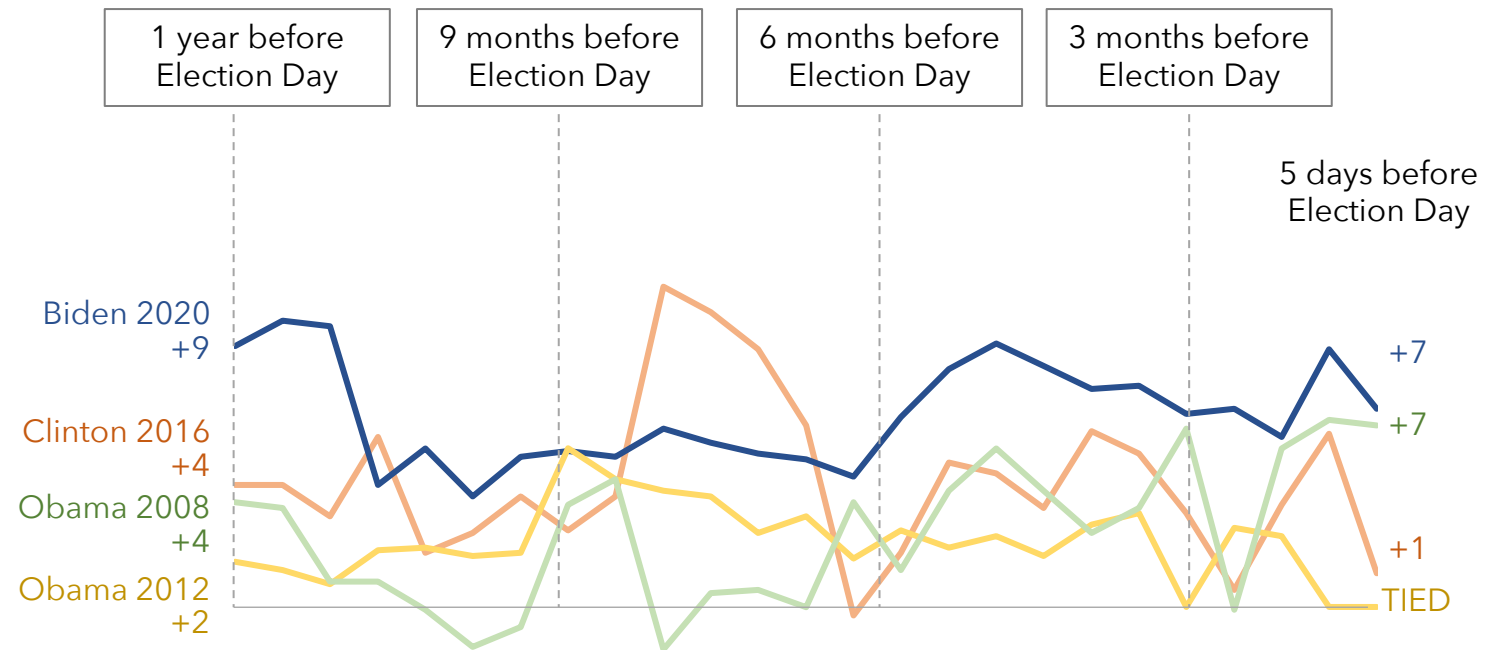
President
Trump

44%

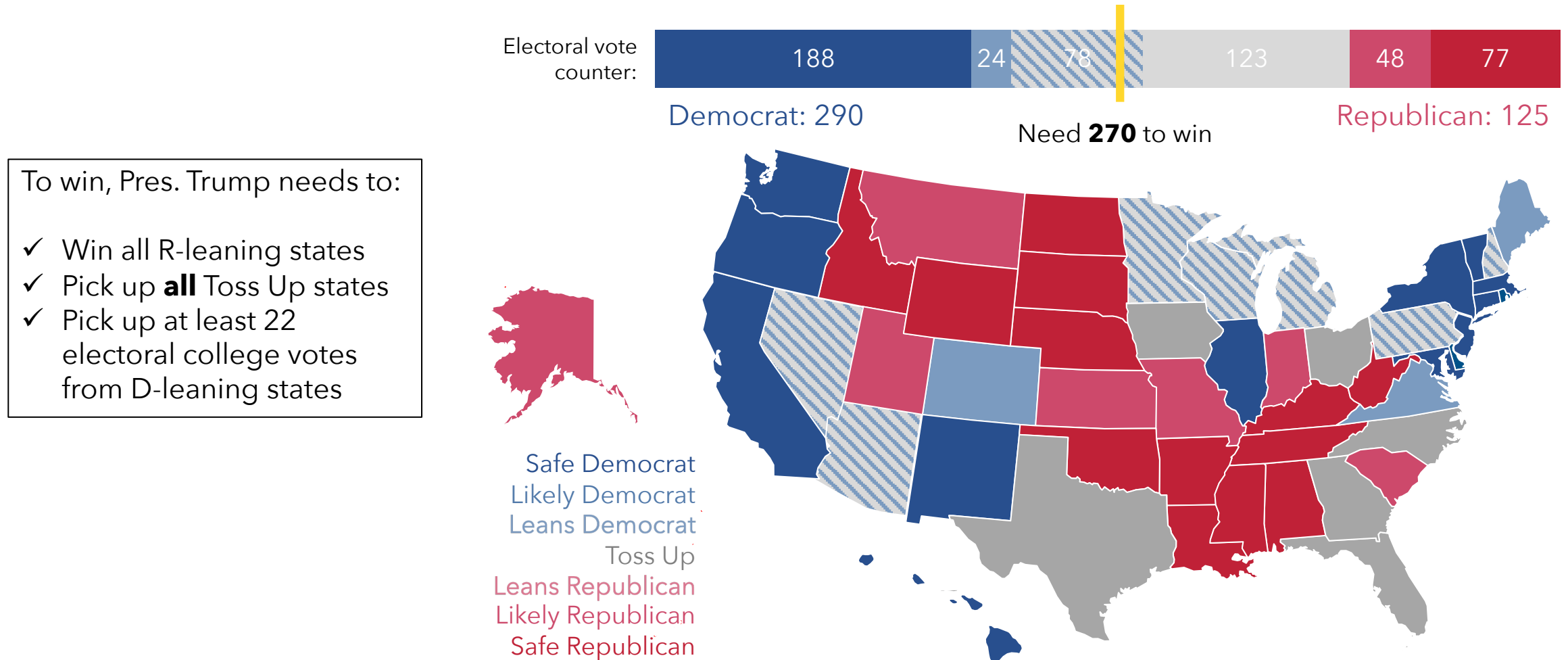
Biden's lead is one point lower
than it was one week ago.

Average Leads Going Into The Final Weekend

Biden's lead has been more consistent
than all others in recent history.

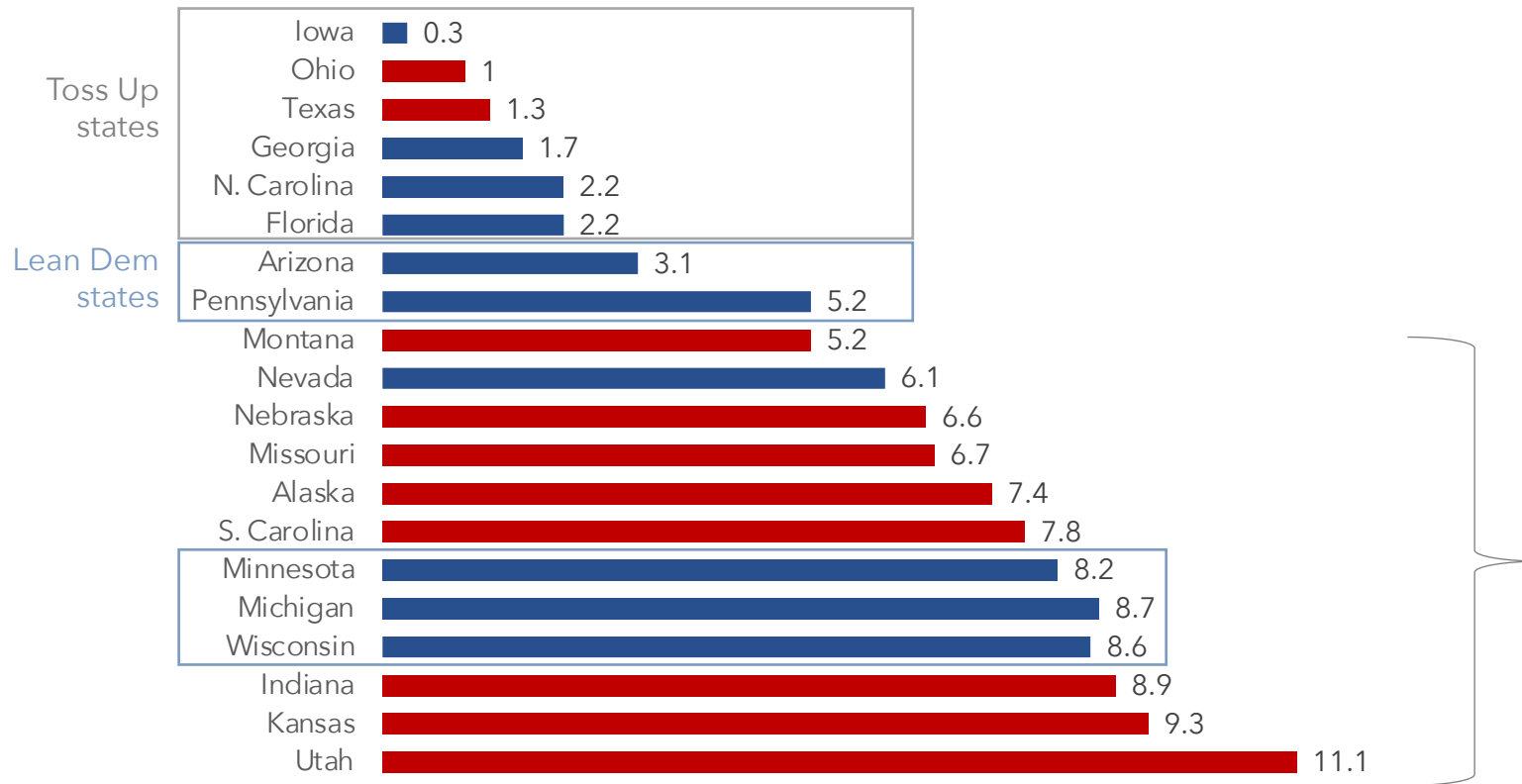


Current electoral college projections strongly favor Biden, even without Toss Ups.



But a lot can change – the race is extremely tight in several battleground states.

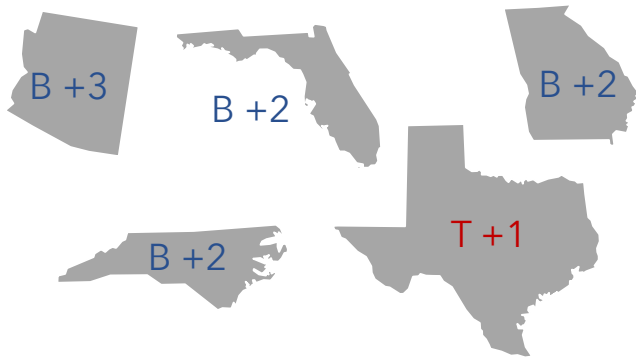
Margins in Current Polling Averages



Statewide polling would need to be off by 6 or more points for Pres. Trump to win any of these blue states.

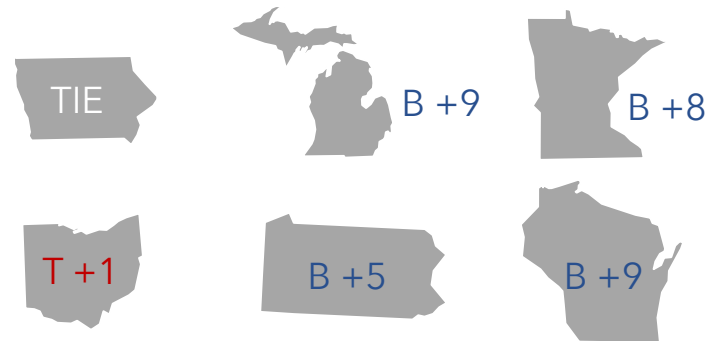
President Trump still has a few possible paths to victory.

Path 1: The South



If Pres. Trump wins the southern states that he won in 2016 (AZ, FL, GA, NC, and TX), he would only need to add one Rust-Belt Lean Democrat state to pull off a win or a tie.

Path 2: Rust Belt and Midwest



If Pres. Trump outperforms in the Rust Belt and Midwest (as he did in 2016) and wins IA, MI, MN, OH, PA, and WI, he can win with just one southern Toss Up or Lean Democrat state.

Path 3: Polling has been wrong



If statewide polling is off by four or five points across the U.S. and has been overestimating Biden's lead, that would put enough states in Pres. Trump's column for a win.

Average polling as of October 30, 2020 shown.



Source: FiveThirtyEight, average statewide polling as of 10/30/2020 (<https://projects.fivethirtyeight.com/polls/president-general/national/>); Washington Post, 10/29/2020 (<https://www.washingtonpost.com/politics/2020/10/29/3-most-likely-paths-victory-biden-trump-maps/>)

Candidates are spending their time and money in some similar states in the last week.

Travel

Joe Biden

Biden plans to travel to **4 states** (Iowa, Wisconsin, Georgia, & Florida).

VP candidate Harris plans to travel to **3 states** (Nevada, Arizona, & Texas).

President Trump

Pres. Trump will have rallies in **7 states** (Arizona, Florida, Minnesota, Nebraska, Nevada, N. Carolina, & Wisconsin).

VP Pence will travel to **4 states** (Wisconsin, Michigan, Iowa, & Nevada).

Spending

Joe Biden

\$6.4 million more spent in last week on TV ads.

Biden has increased spending in:
Florida (+\$1.6M)
Michigan (+\$1.3M)
N. Carolina (+\$1.2M)

President Trump

\$6.2 million more spent in last week on TV ads.

Pres. Trump has increased spending in:
Michigan (+\$1.9M)
Pennsylvania (+\$1.3M)
Georgia (+\$0.9M)

Key demographic groups are shifting from 4 years ago, and even from earlier this year.

Demo group	Current polling	Notable changes
Gender		
Women	Biden +20	Biden’s lead has increased from +9 in early October. Among suburban women, Pres. Trump’s approval is 30%, down 8 points from earlier in 2020.
Men	Biden +1	Biden’s lead has decreased from +7 in early October.
Age		
65+	Trump +17	Biden led this group in some earlier polling, they seem to have come back to Pres. Trump.
Education and race		
White, no college degree	Trump +20	In key battleground states like Minnesota and Wisconsin, Trump’s support among White voters is lower than it was in 2016.
White, with college degree	Biden +14	
Hispanic	Biden +21	Biden’s lead has decreased from +28 in early October.
Other minority	Biden +47	
Religion		
White Evangelicals	Trump +61	72% of White Evangelicals approve of Pres. Trump.



Sources: Economist/YouGov, 10/25-27/2020, n = 1,500 (<https://docs.cdn.yougov.com/nzc8dt85gn/econTabReport.pdf>); Economist/YouGov, 10/4-6/2020, n = 1,500 (<https://docs.cdn.yougov.com/1qb5j6pdqd/econTabReport.pdf>); Gallup, 10/28/2020 (<https://news.gallup.com/poll/323042/suburbanites-show-one-largest-drops-trump-approval.aspx>); Pew Research, 10/13/2020 (<https://www.pewresearch.org/fact-tank/2020/10/13/white-christians-continue-to-favor-trump-over-biden-but-support-has-slipped/>); Politico (<https://www.politico.com/news/2020/09/21/trump-white-voters-support-418420>); Economist/YouGov, 9/27-30/2020, n = 1,500 (<https://docs.cdn.yougov.com/9k0tqsqgue/econTabReport.pdf>)

The 2020 election looks different from 2016 on a few fronts.

Like 2016, this election will come down to key battleground states with very close polling.

There are, however, some key differences.

- **The pandemic:** This is top-of-mind for voters and has led to an increase in early, absentee, and mail-in voting as a result.
- **Voters like Biden more than they liked Clinton:** Biden has a higher net favorability than Clinton did in 2016 and a wider lead in national polling.
- **Voters know how Pres. Trump will lead:** He is no longer an unknown entity.
- **Fewer undecided voters:** 15% of voters were undecided in 2016 compared to 8% in 2020.
- **No real third-party threat:** Both Gary Johnson and Jill Stein were real competitors in 2016.
- **More investment in state polling:** Increased investment in state polling and changes to weighting and turnout modeling will likely make polling more reliable in 2020.
- **Two men at the top of the ticket:** A female candidate at the helm of the Democrat ticket in 2016 may have mattered to enough people to make a difference four years ago.



House and Senate Updates

Analysts predict Democrats could pick up as many as 7 Senate seats.

Solid Dem	Likely/Lean Dem	Toss Up	Likely/Lean Rep	Solid Rep
DE-Coons	MI-Peters	GA-Loeffler	AL-Jones	AR-Cotton
IL-Durbin	AZ-McSally	GA-Perdue	AK-Sullivan	ID-Risch
MA-Markey	CO-Gardner	IA-Ernst	KS-Open	LA-Cassidy
MN-Smith		ME-Collins	KY-McConnell	NE-Sasse
NH-Shaheen		MT-Daines	MS-Hyde-Smith	OK-Inhofe
NJ-Booker		NC-Tillis	TX-Cornyn	SD-Rounds
NM-Open		SC-Graham		TN-Open
OR-Merkley				WV-Moore Capito
RI-Reed				WY-Open
VA-Warner				

77%

chance of Democrats taking the Senate based on current forecasts.

Bold denotes seats that have shifted left in the past week.

Democrats only need to pick up 4 Senate seats to take control.

Most likely to flip
from Republican
to Democrat:



Arizona



Colorado

Toss Up states:



Georgia



Georgia Special



Iowa



Kansas



Maine



Michigan

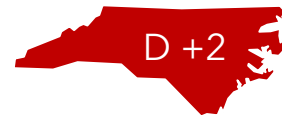
Most likely to flip
from Democrat to
Republican:



Alabama



Montana



North Carolina



South Carolina

*denotes polling within the margin of error.

Average polling as of October 30, 2020 shown with
the exception of AL, CO, KS, ME, SC and GA Special.



Sources: Real Clear Politics Senate race averages, 10/30/2020 (https://www.realclearpolitics.com/epolls/2020/senate/ia/iowa_senate_ernst_vs_greenfield-7072.html); https://www.realclearpolitics.com/epolls/2020/senate/mt/montana_senate_daines_vs_bullock-7063.html; https://www.realclearpolitics.com/epolls/2020/senate/ga/georgia_senate_perdue_vs_ossoff-7067.html; https://www.realclearpolitics.com/epolls/2020/senate/nc/north_carolina_senate_tillis_vs_cunningham-6908.html; https://www.realclearpolitics.com/epolls/2020/senate/mi/michigan_senate_james_vs_peters-6964.html; https://www.realclearpolitics.com/epolls/2020/senate/az/arizona_senate_mcsally_vs_kelly-6801.html; Monmouth University, 10/23-27/2020, n = 504 likely GA voters (https://www.monmouth.edu/polling-institute/reports/monmouthpoll_ga_102820/); Data for Progress, 10/22-27/2020, n = 1,196 likely SC voters (https://filesforprogress.org/memos/2020-senate-project/week-6/dfp_psp_sc_10.27.pdf); Auburn, 10/23-25/2020, n = 853 likely AL voters (<https://www.aum.edu/wp-content/uploads/2020/10/10.29.2020-AUM-Poll-Topline-Results.pdf>); NYTimes/Siena, 10/18-20/2020, n = 755 likely KS voters (<https://int.nyt.com/data/documenttools/ks101820-crosstabs/fcc9a5346866c517/full.pdf>); YouGov, 10/5-9/2020, n = 800 likely CO voters (https://www.colorado.edu/lab/aprl/sites/default/files/attached-files/2020_colorado_political_climate_report_election_topline_10-19-20_.pdf); Colby College, 10/21-25/2020, n = 879 likely ME voters (<https://www.realclearpolitics.com/docs/2020/Wave-4-Topline-Final.pdf>).

Analysts give Democrats an 86% chance of keeping the House.

Lean Dem		Toss Up			Lean Rep	
AZ-1 O'Halleran	NV-03 Lee	CA-21 Cox	AZ-6 Schweikert	NY-2 Open	AK-AL Young	NC-9 Bishop
CA-48 Rouda	OR-4 DeFazio	IA-1 Finkenauer	CA-25 Garcia	NY-24 Katko	AR-2 Hill	NC-11 Vacant
FL-26 Mucarsel-Powell	PA-8 Cartwright	IA-2 Open	IL-13 Davis	OH-1 Chabot	CO-3 Open	NY-1 Zeldin
GA-7 Open	PA-17 Lamb	MN-7 Peterson	IN-5 Open	PA-10 Perry	FL-15 Open	PA-1 Fitzpatrick
IA-3 Axne	SC-1 Cunningham	NM-2 Torres Small	MI-3 Open	TX-21 Roy	MI-6 Upton	TX-3 Taylor
IL-17 Bustos	TX-23 Open	NY-11 Rose	MN-1 Hagedorn	TX-22 Open	MT-AL Open	TX-10 McCaul
MI-8 Slotkin	VA-2 Luria	NY-22 Brindisi	MO-2 Wagner	TX-24 Open	NC-8 Hudson	WA-3 Herrera Beutler
MI-11 Stevens	VA-7 Spanberger	OK-5 Horn	NE-2 Bacon	VA-5 Open		
NJ-3 Kim	WI-3 Kind	UT-4 McAdams	NJ-2 Van Drew			
NJ-7 Malinowski						



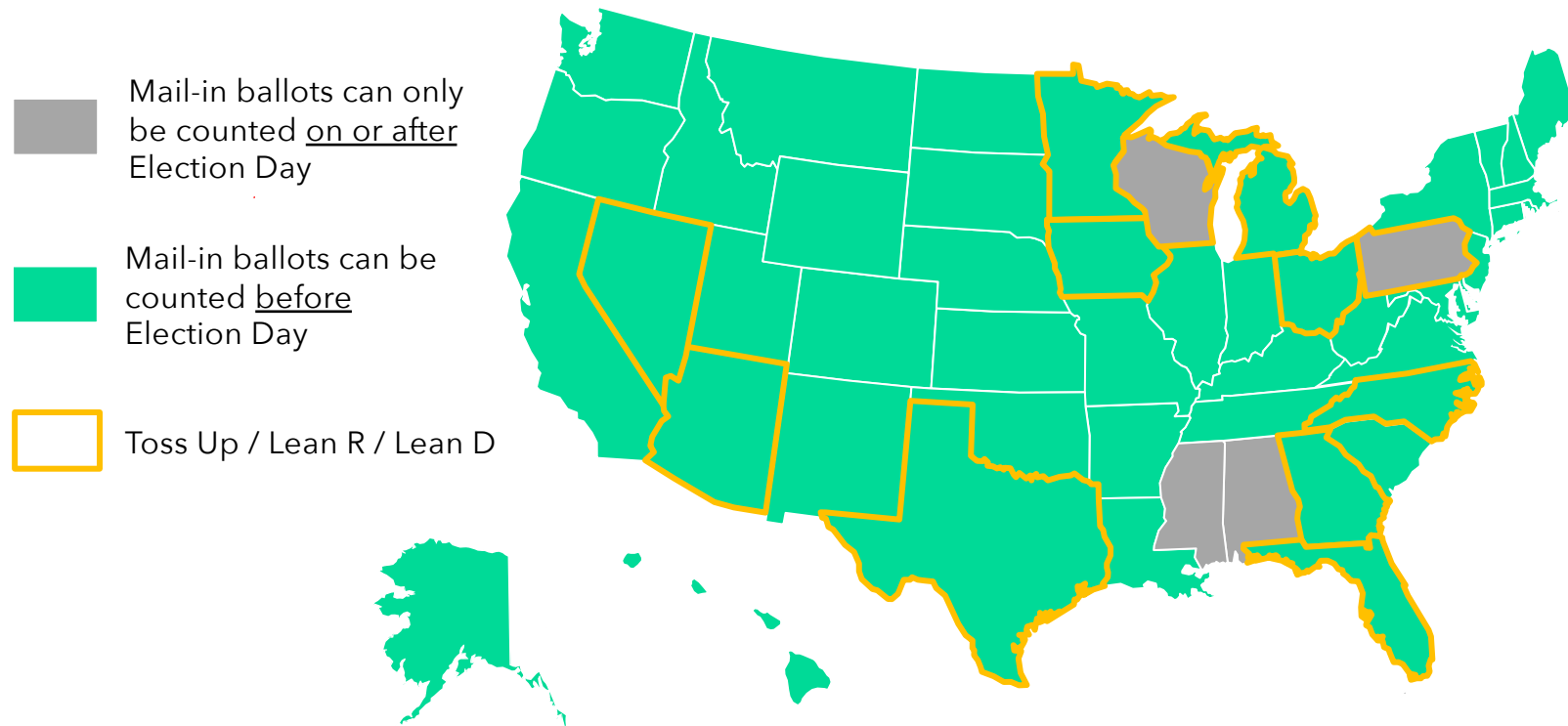
Source: Cook Political Report, 10/21/2020 (<https://cookpolitical.com/ratings/house-race-ratings>); FiveThirtyEight, 10/23/2020 (<https://projects.fivethirtyeight.com/2020-election-forecast/house/>)



What to Watch

Because of varied vote counting procedures, results may not be available for some key states soon after Election Day.

Early Vote Processing Timelines



Election Results Forecast

More likely to have results on

Wed. Nov 4:

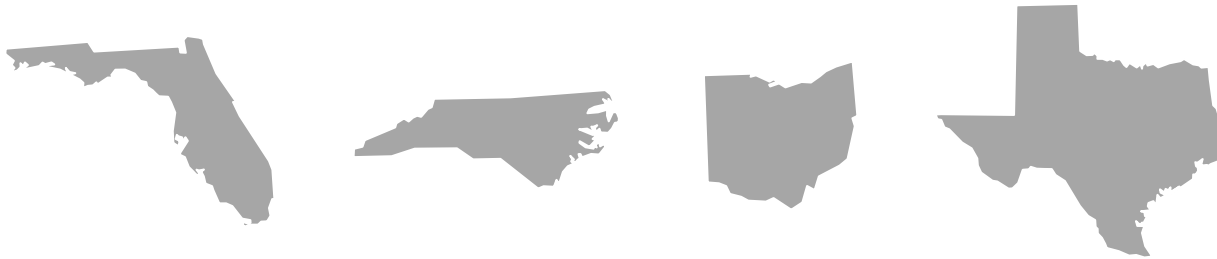
Arizona (11)
 Florida (29)
 Iowa (6)
 Minnesota (10)
 Nevada (6)
 Ohio (18)
 Texas (38)

Less likely to have results on

Wed. Nov 4:

Georgia (16)
 Michigan (16)
 North Carolina (15)
 Pennsylvania (20)
 Wisconsin (10)

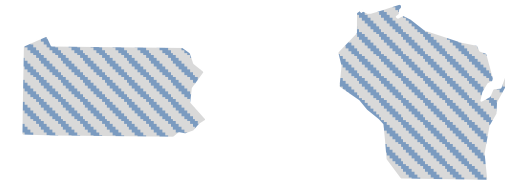
There are some important states to watch closely as presidential election results come in.



Florida, North Carolina, Ohio, and Texas

If **one** of these states is called on Election Day for Biden, he will have almost certainly won.

If **all** of these are called on Election Day for Pres. Trump – and if all Likely and Lean Republican states are as well – it still won't be enough to declare him the winner on Election Day without flipping some states that Lean Democrat.



Pennsylvania and Wisconsin

Results will likely be delayed.

At 20 and 10 Electoral College votes respectively, this could make the difference for either candidate.

Key races may determine control of the Senate.

Expected shifts:



Democrats will likely pick up Arizona and Colorado's Senate seats.

Alabama is expected to be a pick-up for the Republicans.

Close key races:



If Democrats flip seats in Iowa, Maine, and North Carolina - plus the expected shifts pan out - Democrats can take the Senate.

Potential runoffs:



Both Georgia Senate races could result in run-off elections.

Unexpected results:



If Democrats flip seats in Kansas, South Carolina, or Montana, it would be somewhat surprising, but put them in position to take the Senate.

While Democrats will most likely retain the House, there are a few key races to watch.

Endangered GOP incumbents:



AZ-06:
David Schweikert



PA-01:
Brian Fitzpatrick



NJ-02:
Jeff Van Drew

GOP-held open seats:



IN-05



PA-01



NJ-02

**Democrat in district
Pres. Trump won
big in 2016:**



MN-07:
Collin Peterson

**Freshman
Democrats in
vulnerable seats:**



GA-06:
Lucy McBath



NM-02:
Xochitl Torres Small



OK-05:
Kendra Horn



SC-01:
Joe Cunningham

What's Ahead: Final days

NOVEMBER

ELECTION DAY

- Tuesday, Nov. 3.

STATES TALLY MAIL-IN BALLOTS

- Expected to continue into the weeks after Nov. 3.

LAME DUCK SESSION

- The House and Senate will return to session in November, likely with some lame duck legislators.

JANUARY 2021

INUAGURATION DAY

- Wednesday, Jan. 20 is 82 days away.

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