

By the barest of margins

Our final report on the US presidential election

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The TLDR

1. **Lean – just – to Harris:** We think the race is very marginally lean Harris - 276 electoral college votes to 262 on a national vote share of lead 2.7%. **We would assign a 55% probability of a Harris win at this stage.**
 - a. This is driven by wins across the Blue wall (Michigan, Wisconsin, Pennsylvania)
 - b. Our MRP has basically converged on this narrow path - but was never as pro Harris as our swing state polls.
 - c. The reason its “lean” Harris - and nothing stronger - is she’s losing all in the states which have less historical polling error and due to win in all the states that have had massive anti Republican polling (1-6%) last two cycles
 - d. Only 0.7% swing towards the Republicans in swing states gives it to Trump. Last average error was 3.5 points and in 2016 it was 3.7 points.
2. **Harris could win bigger than people think:** If our polls are correct - there exists a credible path to Harris winning bigger than Biden in 2020, she’s within touching distance in Georgia and North Carolina. If she takes this plus midwest she’s on course for 328 votes
3. **But she really only leads in states which were called wrong in 2016 and 2020:** If the online polls replicate the errors of 2016 or 2020 due to a combination of non-response bias, education - and vaccination status. The latter is our prime suspect for potential error Trump will win over every swing state - bar Michigan; which ironically we think is the best candidate for a pro-republican polling error due to ethnic composition
4. **Harris was the rust belt candidate and weaker in the south during the campaign; that’s now reversing.** Harris has been stronger in mid west and weaker in south all campaign - but in our polling this trend has actually been reversing past 2 weeks - stronger in Georgia and North Carolina and softening in mid west
5. **We are not convinced that the Mid West always moves as one:** We are not super convinced that the mid west will move as one (State statistics from when they last didn’t move together) - we think PA is beginning tilting Democrat, but WI looks very close, and Michigan polling - safest in our estimates - prime candidate for a polling error
6. **The Democrat coalition looks a lot more Reagan-esque than before:** The pattern of the election is that the Harris coalition will be whiter, richer, more educated and more female than previous Democrat coalitions. There will be some racial depolarisation - but it is modest vs the headlines (see our principal component analysis below)
7. **Pollsters have been herding big time:** Pollsters have been herding - Ann Seltzer aside - the election has been hard to call, which isn’t the same as being close - it may not be
8. **The Fundamentals favour Trump.** If we weren’t looking at voting intention opinion polls - our prior would be a Trump win. Firstly the performance of incumbent governments, second Trump owns with material leads the top three issues. The side that overperforms on top issues normally wins. In the plus Harris column is the fact that she has superior favourable ratings in Mid West

9. **Early voting doesn't provide any clarity:** Early voting largely indicate a really close election - rather than blue wave. Michigan and Nevada look worse than current polls for Democrats, but other states look more in line with our estimates
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Since the start of the year, the team at Focaldata has been working on our state polls and MRP for the US presidential election, alongside analysing other methods of forecasting the election like early voting and fundamentals.

After months of slight variation in the methods, our signal has now become much clearer: **Kamala Harris is the narrow favourite to be elected president, but the race remains very close.**

Assigning each state to the most likely winner, our current projection estimates that **Kamala Harris will win 276 Electoral College** votes to **Donald Trump's 262**, on a national popular-vote lead of 2–3 percentage points.

A Harris victory would be driven by wins across the Rust Belt – Michigan, Pennsylvania and Wisconsin – while Trump is set to pick up southern states like Arizona and Georgia.

Both our MRP and swing state polls have converged on this path over the course of the campaign. Almost all of our MRP runs since September have pointed towards a Trump victory, but our final update has picked up on movement towards the current vice president in key states.

Due to sensitivities around polling error and fundamentals, our call remains 'lean Harris' by the barest of margins. Some of Harris' most crucial leads come in states which had a significant pro-Republican polling miss in 2016 and 2020. A margin shift of just 1.4 points in the tipping-point state of Pennsylvania in our swing state polls would see Trump take the win – in raw numbers, this means just 40,000 voters changing their minds, or 0.02% of the national vote (for context, the average polling error in swing states was 3.5 points in Trump's favour in 2016, and 3.7 points in 2020).

State	FD state polls	FD MRP	Fundamentals	EV implication	Our call
Arizona	Trump +1	Harris +1	Approval Trump +2 Issues Trump +10 Crowd T+18 / T+5	Trump +2	Likely Trump
Georgia	Trump +1	Trump +1	Approval Tied Issues Trump +8 Crowd T+10 / H+1	Tied	Lean Trump
Michigan	Harris +5	Harris +4	Approval Harris +12 Issues Harris +8 Crowd T+4 / H+8	Trump +6	Likely Harris
Nevada	Harris +2	Harris +3	Approval Harris +6 Issues Trump +2 Crowd T+9 / H+1	Trump +1	Lean Harris
North Carolina	Tied	Trump +3	Approval Harris +4 Issues Trump +2 Crowd T+12 / H+5	Tied	Lean Trump
Pennsylvania	Harris +1	Tied	Approval Harris +4 Issues Tied Crowd T+10 / H+8	Harris +3	Lean Harris
Wisconsin	Harris +3	Harris +1	Approval Harris +10 Issues Harris +2 Crowd T+9 / H+4	Harris +2	Likely Harris
ELECTORAL COLLEGE	Harris 276-262	Harris 282-256*	Approval H 276-262 Issues T 287-251 Crowd T 297-241	Harris 271-267	Lean Harris

*MRP Electoral College counts are probabilistic.



Could someone win big?

Both candidates are a normal-sized polling error away from a large win in the Electoral College. A 2020-style polling error would see Trump back in the White House with 312 electoral votes, winning every swing state. On the flipside, there is also a credible path for Harris to outperform Joe Biden. The vice president is within touching distance in North Carolina and a polling error of just 1–2 points in her favour across the swing states would see Harris sweep to victory by a 100-vote margin in the Electoral College.

Can polling errors be predicted?

In reality, not really. The polls underestimated Trump in 2016 and 2020, but it's rare for polls to be out in the same direction for three elections in a row, which is not to say that it definitely won't happen, but that the direction of past polling error tells us very little about its direction going forward. In fact, we could make the argument that pollsters may be overcorrecting for underestimating Trump in the last two elections and may miss a Harris victory.

Our early voting analysis (below), however, can help to identify where a polling error may occur. The prime suspect in this case is Michigan, which ranks behind Wisconsin as the swing state with the largest total polling error over the last four elections. Given the demographic makeup of the state, we think Michigan may be susceptible to a polling error which favours Republicans.

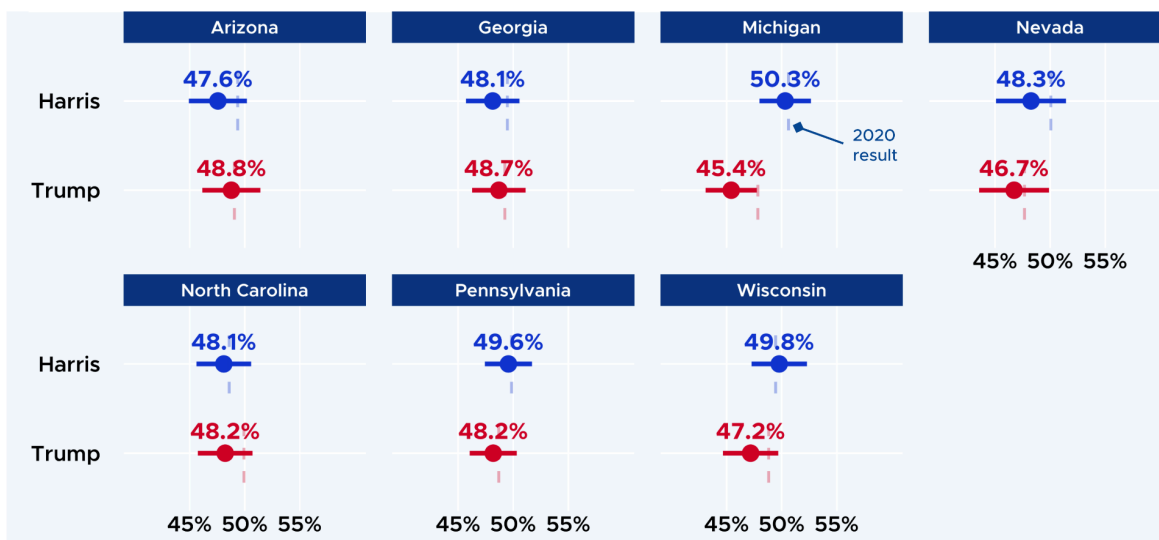
Our results

STATE POLLING



Kamala Harris narrowly leads in most swing states

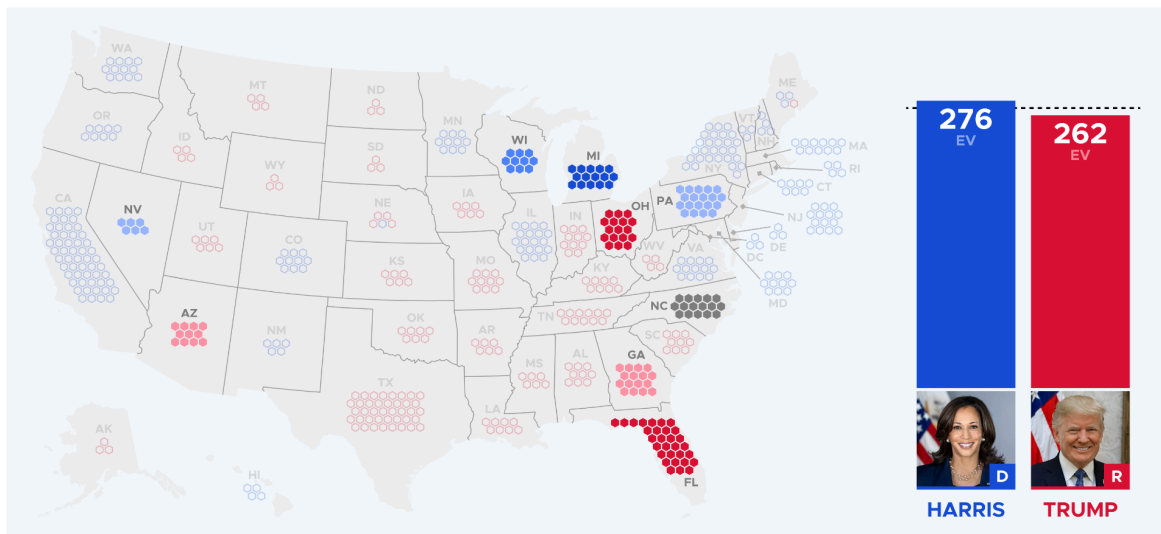
VOTING INTENTION AMONG LIKELY VOTERS



Fieldwork conducted 3 Oct - 1 Nov 2024 with a sample size of 16,615 likely voters across the swing states. Data weighted by age, gender, education, ethnicity, population density, past vote and party registration. Likelihood to vote calculated using a model which uses validated voter panels to determine the effect of demographics and survey answers on turnout.



Our final wave of swing state polling puts Kamala Harris narrowly ahead in the key Rust Belt states of Michigan, Pennsylvania and Wisconsin, along with Nevada. Trump, meanwhile, leads in Arizona, Georgia and North Carolina. If the leader in each poll went on to win the respective state (however narrow their lead!), Harris would win the election with 276 Electoral College votes to Trump's 262.



State polls conducted 3 Oct - 1 Nov 2024 with a sample size of 16,615 likely voters across the swing states. Data weighted by age, gender, education, ethnicity, population density, past vote and party registration. Likelihood to vote calculated using a model which uses validated voter panels to determine the effect of demographics and survey answers on turnout.



Harris' vote share is holding up in the Rust Belt, fueled by strong numbers among older white women – a group in which Trump underperforms a generic House Republican. The Republican nominee has made ground since 2020 with younger black and Hispanic men, however, which explains why Arizona and Georgia are currently showing narrow leads for the former president.

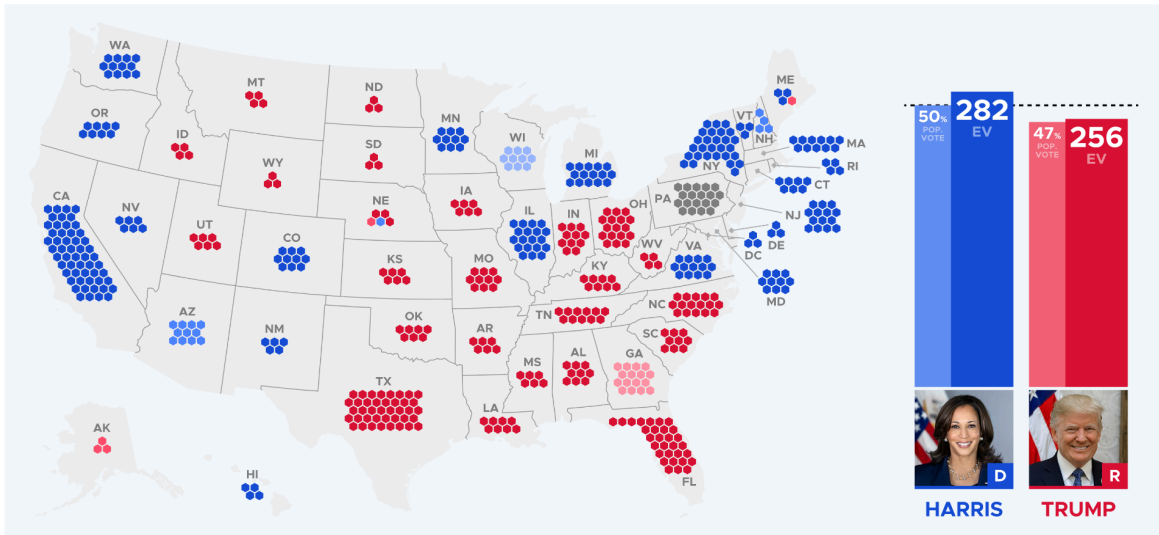
[See the data tables here.](#)

MRP

Our final MRP model of the campaign paints a similar picture, with leads for Harris in most of the swing states and a 3-point lead at the national level (50% for Harris, 47% for Trump). Over the course of the campaign, most runs of our MRP showed Trump ahead, but we have captured a late move towards Harris.

Harris narrowly favoured to win the presidency

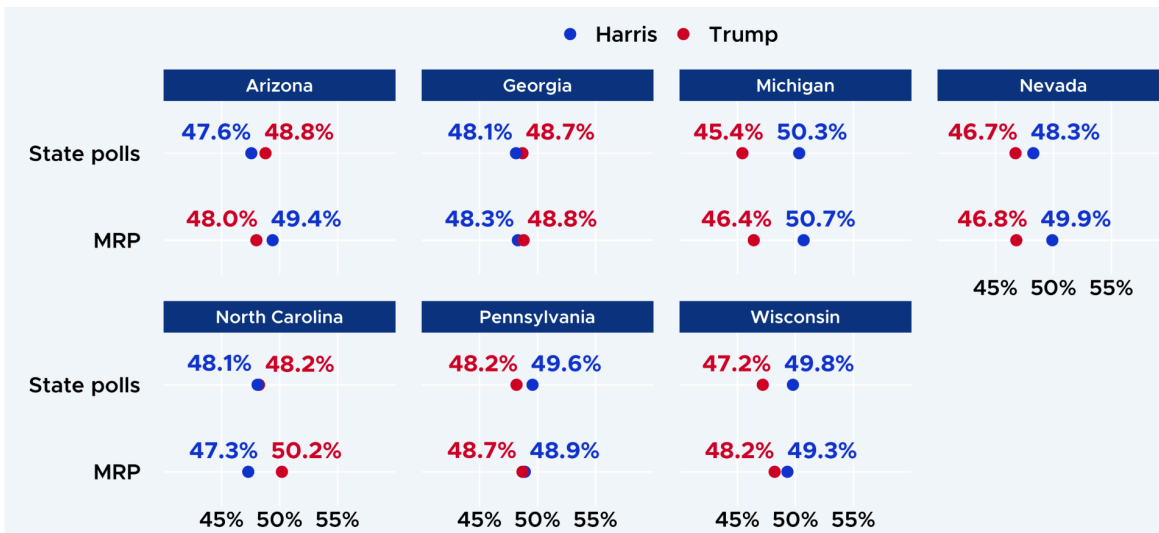
RESULTS OF FINAL FOCALDATA MRP MODEL



Our state polls and MRP have converged over the course of the campaign, and now agree in all swing states except Arizona:

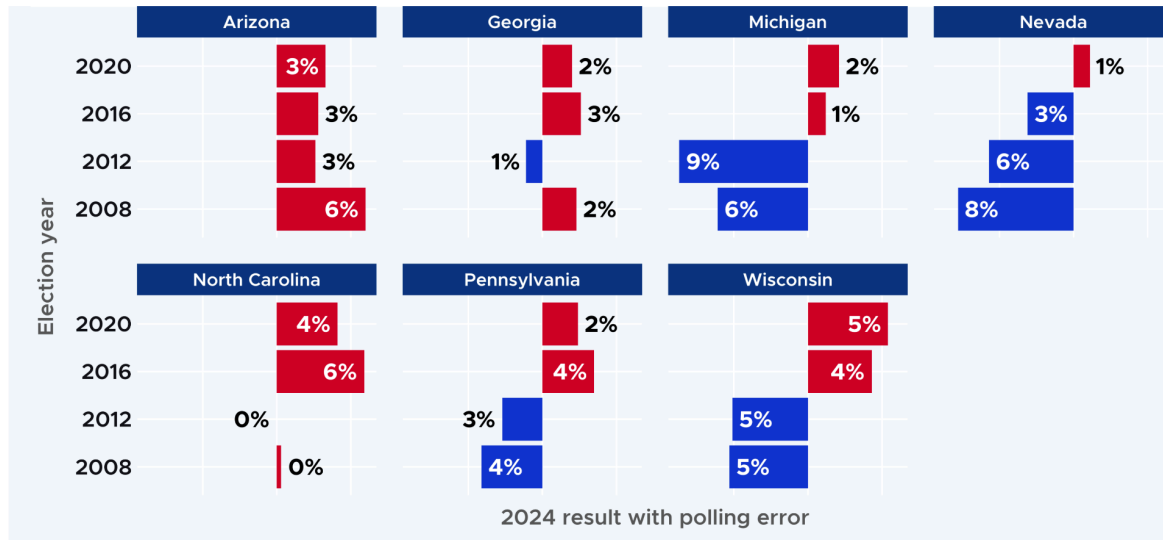
State polls and MRP have mostly converged

VOTING INTENTION AMONG LIKELY VOTERS: STATE POLLS VS MRP



State polls conducted 3 Oct - 1 Nov 2024 with a sample size of 16,615 likely voters across the swing states. Data weighted by age, gender, education, ethnicity, population density, past vote and party registration. Likelihood to vote calculated using a model which uses validated voter panels to determine the effect of demographics and survey answers on turnout.

While both methods show Harris ahead, it's worth reiterating that both candidates are a normal-sized polling error away from clear wins. A 2020-style error would see Trump winning all seven swing states, whereas a 2012 error would secure a solid Harris victory.



2020 and 2016 polling averages sourced from 538. 2012 and 2008 polling averages sourced from Real Clear Politics.



What do the candidate coalitions look like?

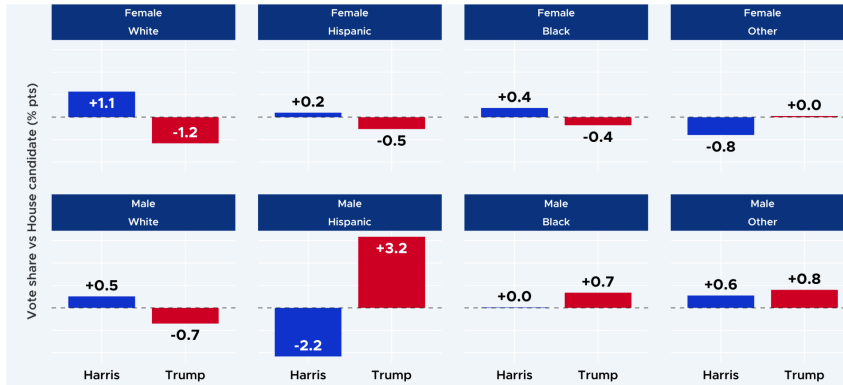
THE DEMOCRAT COALITION IS MORE REAGAN-ESQUE

We have been tracking the changes in the US party coalitions over time. The plots below show how the counties which vote Republican and Democrat have shifted over time – both in terms of the size of each electoral coalition, but also the types of voters who are opting for each party. From 2000–2008 the overlap between the Republican and Democrat coalitions was much greater, with much less differentiation by density and education, and to a degree income. Since then, we have seen the Democrat coalition become much richer, much more diverse and urban between 2008 and 2016. In 2020, we saw an interesting inflection in which the Democrat coalition became higher income, less diverse, and even more educated than before – losing ground in ethnically diverse and working class areas, and picking up support in whiter, richer areas.

Compared to a generic Democrat, Harris is disproportionately popular with white women, whereas Trump gains with Hispanic men compared to his Republican House counterparts. This may see the Republican coalition becoming more diverse again in 2024, and will no doubt be the subject of a serious post-mortem in the event of a Trump victory.

White women and men of colour diverge

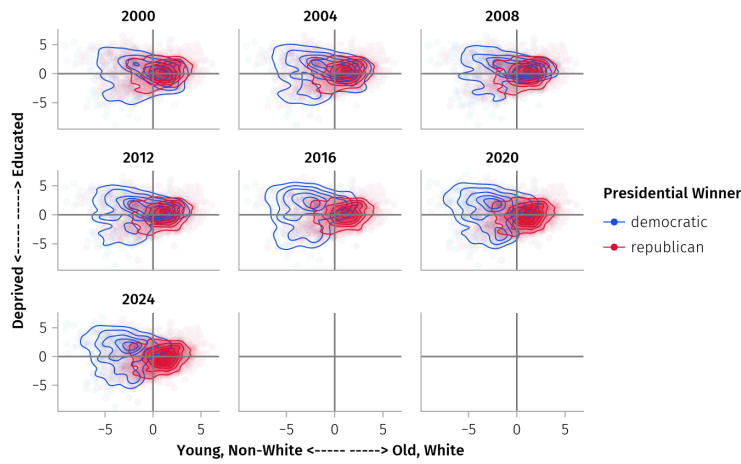
HARRIS/TRUMP VOTE SHARE VS GENERIC CANDIDATE, BY RACE & GENDER

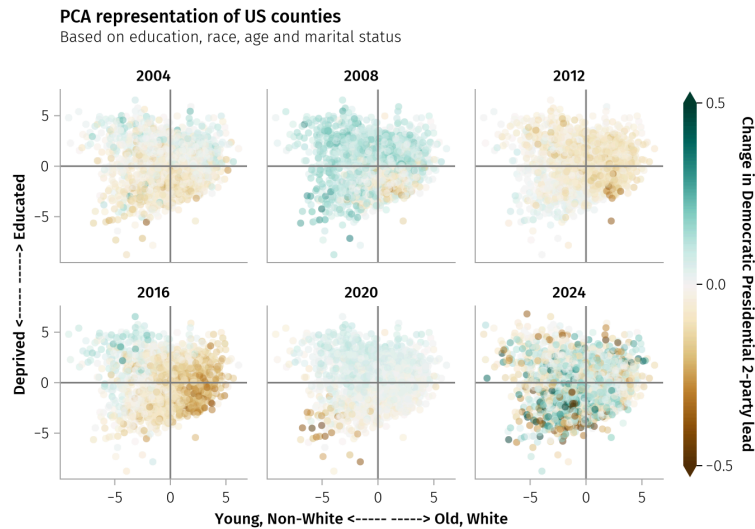


Fieldwork conducted over the last month with a sample size of 13,422 respondents across swing states. Data weighted by age, gender, education, ethnicity, population density, past vote and party registration. Likelihood to vote calculated using a model which uses validated voter panels to determine the effect of demographics and survey answers on turnout.

PCA representation of US counties

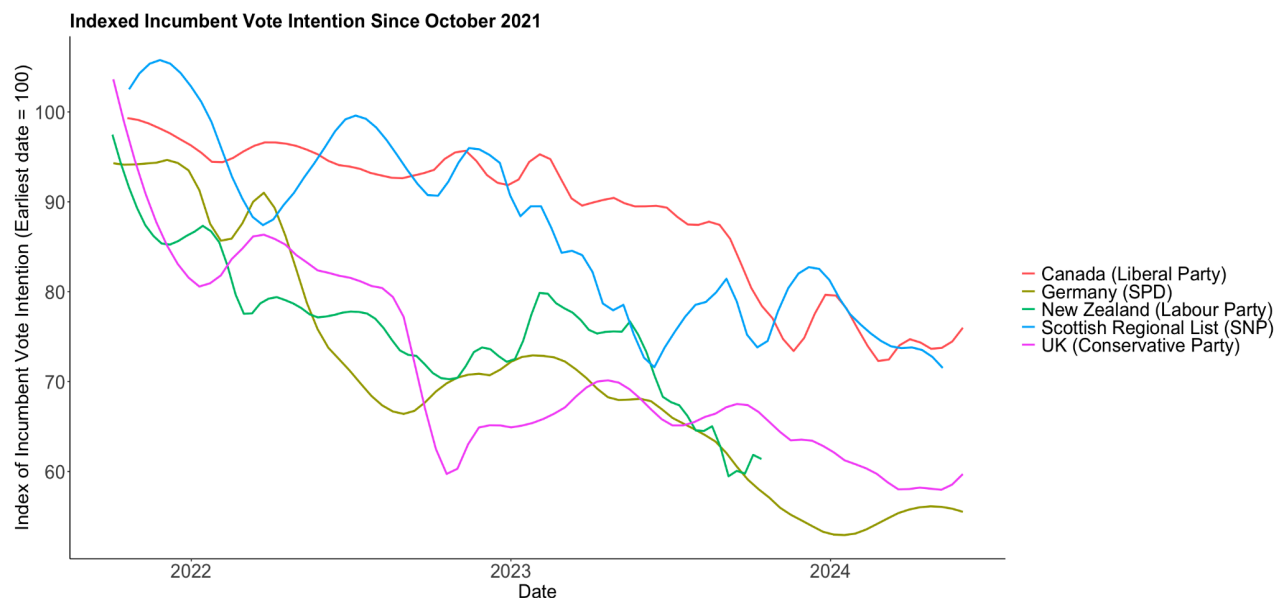
Based on education, race, age and marital status





What do the fundamentals say?

If we weren't looking at voting-intention polls, our prior would be a Trump win. The recent performance of incumbent governments across the Western world since the post-COVID cost of living crisis and Trump's material lead on the top electoral issues both point towards a second non-consecutive term for the Republican nominee. On Harris' side, however, is her superior favourability ratings in the Midwest.



WISDOM OF THE CROWDS

We asked respondents in the swing states the following two questions:

- 'Regardless of how you personally intend to vote, how do you think people **in your local area** will vote in the upcoming presidential election?'

- ‘And, regardless of what you personally want to happen, **who do you think will win** the upcoming presidential election?’

Crowdsourcing a forecast in this way can be a soft signal of election results. In every swing state we polled, a majority of respondents thought people in their local area would vote for Trump. When questioned about the national winner, a narrow majority of voters in six of the seven swing states thought Harris would win the election. Interestingly, in our MRP and ‘final call’ exercise on an [Australian constitutional referendum](#) the wisdom of crowds and voting intention broadly aligned – and accurately, we may add.

We do not see crowd-sourced forecasting as a hugely useful metric until we have more evidence, so it only plays a very small part in our final call on the election. If Trump goes on to win, however, the signs will have been there, but we simply may not have trusted non-traditional methods enough.

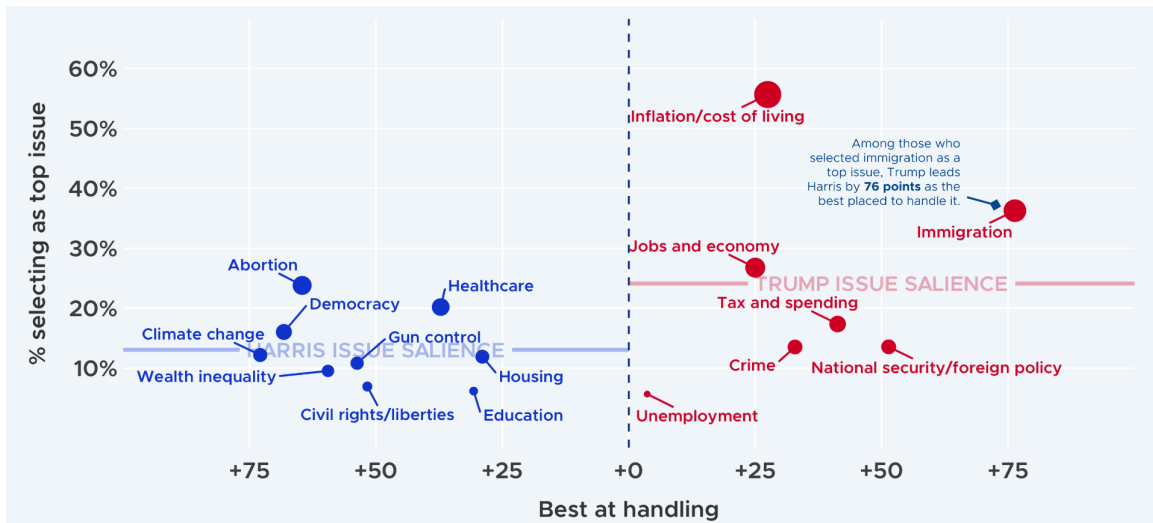
State	Expected winner in local area	Expected national winner
Arizona	Trump +20	Trump +5
Georgia	Trump +9	Harris +1
Michigan	Trump +4	Harris +8
Nevada	Trump +9	Harris +1
North Carolina	Trump +12	Harris +5
Pennsylvania	Trump +10	Harris +8
Wisconsin	Trump +9	Harris +4

TOP ISSUES

Trump’s lead on the top issues has not shifted over the course of the campaign. However, we also find that some Trump-heavy issues like immigration have fallen in salience in recent weeks, with the former president unable to keep the issue as high up the agenda as it was a couple of months ago. In contrast, areas in which Harris is strong – particularly healthcare – have climbed up people’s priority lists.

Trump's lead on big issues has not moved

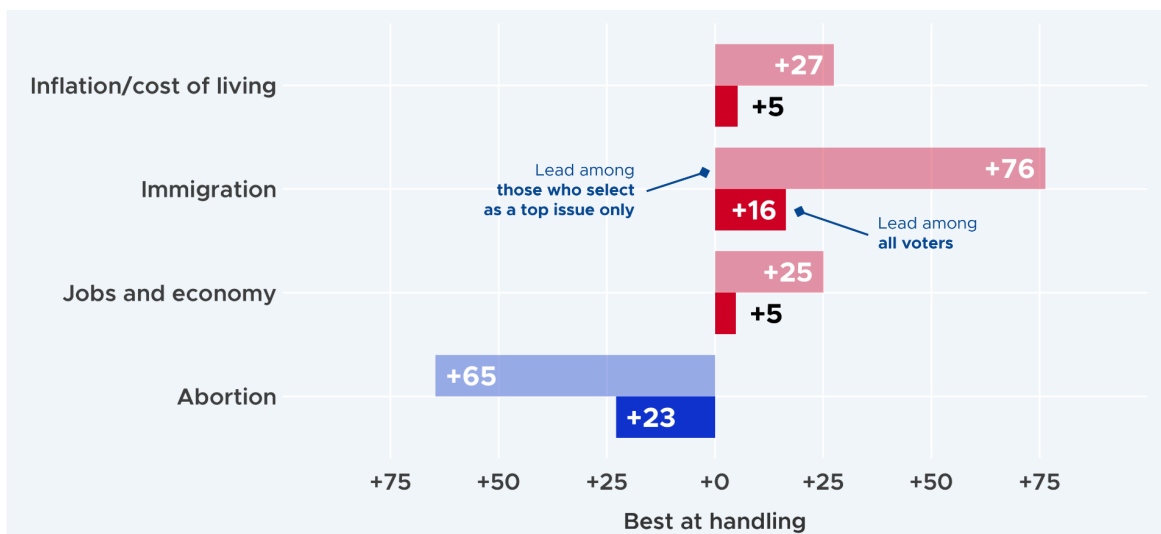
ISSUE IMPORTANCE VS. BEST PARTY/CANDIDATE TO HANDLE



The above chart shows the lead for each candidate among those who select an issue as one of their top priorities, so there is a degree of partisanship which can affect the outcome. For example, Republican voters are more likely to select immigration as a top priority, so it stands to reason that Trump's lead on the issue will be high. However, even when we account for partisanship by asking *all* voters for their assessment of the candidates on the big four issues (inflation/cost of living; immigration; jobs and the economy; and abortion), Trump still led on three.

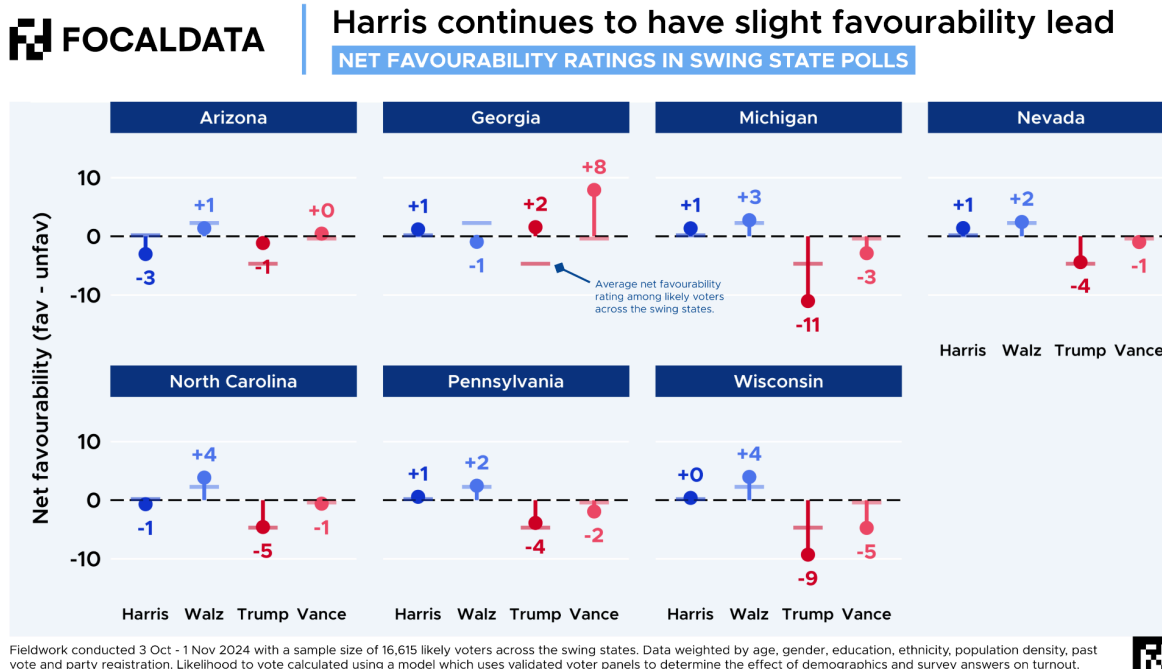
Donald Trump seen as best to handle big issues

BEST PARTY/CANDIDATE TO HANDLE TOP FOUR ISSUES



FAVOURABILITY

Harris boasts a higher approval rating than Trump in five of the seven swing states, with just Arizona and Georgia giving leads for the Republican nominee. Harris' approval ratings are pretty consistent across the swing states, but in parts of the Rust Belt – specifically Michigan and Wisconsin – Trump's favourability ratings are prohibitively low.



Can early voting stats help to predict the outcome?

Early voting analysis is traditionally frowned upon, and trying to read the tea leaves through direct comparison with 2020 early voting stats (an election when the country was in the middle of a global pandemic and one candidate was openly stating that early voting was going to be rigged against him) is a fool's game.

However, as a research company we have the advantage over other early vote analysis methods in that we have actually *asked* voters whether they would vote early or on election day, so no comparison with 2020 is necessary. We have compared our estimates of the early-voting electorate with the demographic breakdowns of votes so far to project the overall early vote shares for each candidate, allowing us to compare the estimated totals with hypothetical early vote shares if the race were tied overall.

For example, in a tied race in Arizona, we would expect Harris to lead the early vote by 2.8 points based on our polling. Based on the demographics of those who have [actually voted early](#),

however, we think that the early vote is basically tied (Harris leads by 0.6 points). Harris underperforming a tied race by 2.2 points means that we project Trump will take the state by that margin based solely on early voting analysis.

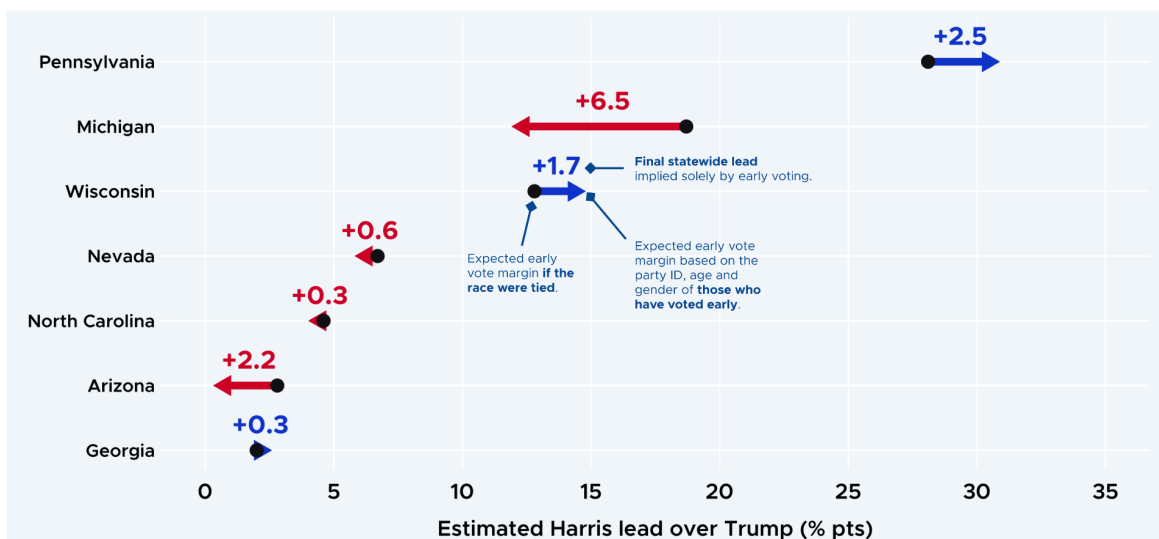
Like other methods, our early voting analysis points to an extremely close race, with a razor-sharp margin of just 0.3 percentage points favouring Harris in the tipping-point state of Georgia. Early voting stats do not give any indication of a landslide for either candidate.

The one state that stands out in our analysis is Michigan, where Harris is significantly underperforming expectations. We estimate that she leads the early vote by 12 points, when a tied race would show a Harris lead of 19. These stats have echoes of the Democratic primary in the state earlier this year, where an ‘uncommitted’ movement opposing Joe Biden picked up 13.2% of the vote from the Democratic electorate, driven partly by a rejection of the administration’s position on the Israel-Palestine conflict. Michigan has the fifth-highest Muslim population in the country at 2.4%, and as we saw in the recent UK general election, pollsters have serious issues with sampling [ethnic-minority respondents](#) – particularly those of Muslim background. These factors all create a perfect storm for a potential polling error in Michigan, meaning our final call in the state is only ‘likely Harris’ rather than ‘safe Harris’.



Early voting suggests 271-267 Harris victory

EXPECTED EARLY VOTING RESULTS VS FORECAST FOR TIED RACE



Early voting stats sourced from NBC News / TargetSmart.



The polling context

This year’s US presidential election has felt like a remarkably low-key affair given the stakes involved and the tightness of the race. Pollsters are afraid of another big miss on the election and underestimating Trump for the third time in a row. A degree of herding appears to be occurring in

public polls. For non-poll junkies, herding is a phenomenon where pollsters aim to reduce the risk of being a notable outlier who calls the race wrong by weighting their results to more or less match other public polls. This reduces reputational risk for an individual pollster, but it makes the overall polling average more prone to a miss, and misinforms the public about the range of possible outcomes.

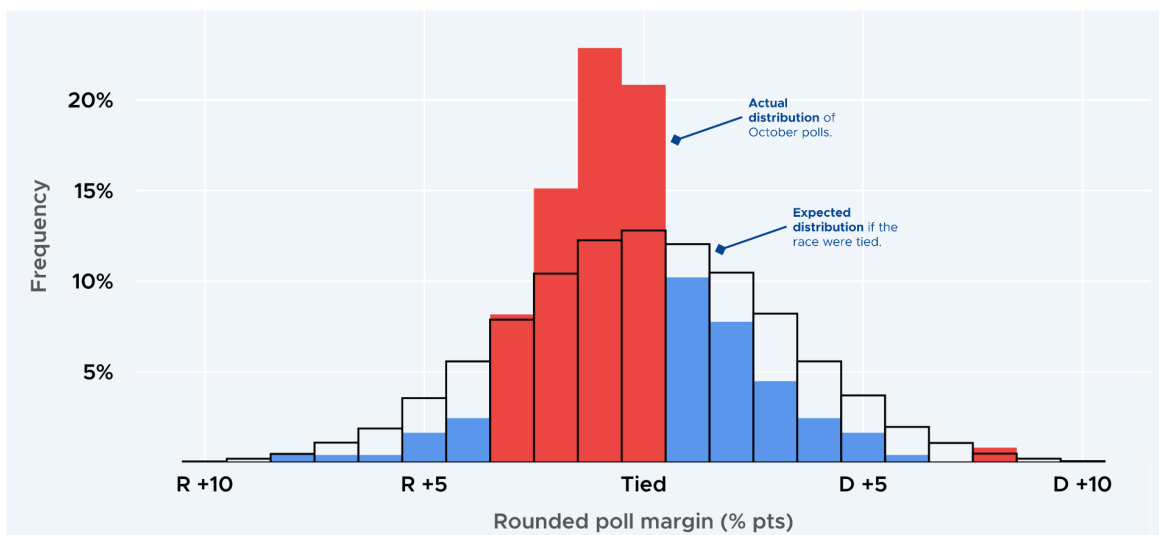
Deviation from the 'true' value is inherent to polling and is very much a good thing. Due to their sample sizes, individual polls are not perfect predictors of the population they are trying to measure (this is why you might hear about margins of error), and they should not be presented that way. If an election were truly tied 50-50, a poll of 1000 people should show a rounded lead of six points or more for one of the candidates around 7-8% of the time, and a rounded lead of four points or more around a quarter of the time.

If we compare those estimates with actual poll results from the seven key swing states, we see that pollsters have released more than 50% more tied polls than we would have expected (13% expected vs 21% actual), and while over a quarter of polls (25.9%) ought to show rounded leads of four points or more, barely 1-in-10 (10.6%) polls in October did. While weighting schemes will tighten the distribution of our expected values, some firms are putting out polls where the variance between states and previous polls looks suspect.



Herding in action?

EXPECTED VS. ACTUAL POLL DISTRIBUTION IN SWING STATES



Expected distribution based on a simulation of 50,000 polls with a sample size of 1,000 respondents each.
Actual poll results taken from FiveThirtyEight, including only likely voter polls conducted in the seven swing states where fieldwork finished in October 2024.



The tight distribution of polls is giving the false impression of a high degree of certainty in a close race, which should not be the case. In reality, both candidates are a normal-sized polling error away from a clear win. **A hard-to-read race does not necessarily mean it will be close.** As mentioned earlier, there is a clear pathway for Harris to have a highly comfortable victory; we have her almost over the line in both Georgia and North Carolina state polls – 0.6 points or less,

which would give her a win bigger than Biden's 2020. Indeed our MRP simulations show that the number of large Democratic wins dwarfs the number of simulations with large Trump wins.

Our methodology

How does Focaldata's methodology differ from anyone else's?

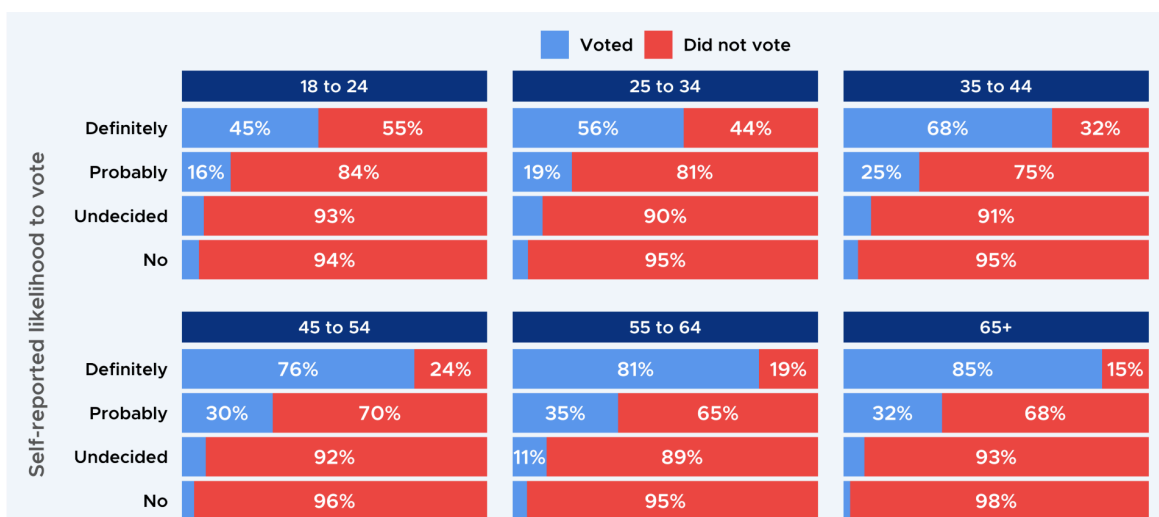
We have been concerned about the sources of polling error among US pollsters over the last ten years, and have taken time to address it. We believe that viewing the race using both traditional polling and MRP modelling is the best way to get a clear view of the overall electoral picture.

Our turnout model is a big distinguishing feature in our polling. [Our analysis](#) shows that merely relying on someone's self-described likelihood to vote does not provide you with the full picture, and that a 'definite' voter has different definitions across a variety of demographics.



Turnout of 'definite' voters varies greatly with age

SELF-REPORTED LIKELIHOOD VS. VALIDATED TURNOUT BY AGE



Data sourced from the CCES 2020 panel of 60,000 respondents.
Turnout relates to whether a respondent had a validated vote for president in the 2020 United States presidential election.



Our turnout model uses validated voter panels to assess the effects of demographics and self-described turnout likelihood on voter participation, in order to get a better view of who will actually turn out in an election.

We also have an Automatic Data Quality (ADQ) engine, which screens out bots, duplicate respondents and those who race through the survey without reading the questions properly.

How does MRP differ from normal polling?

While state polls typically rely on samples of around 1,000 in each state, our MRP model has a 'mega sample' of over 20,000 voters nationally. One of the key advantages of MRP is that it

makes use of data across the country to predict levels of support in each individual state. If a poll does not have many respondents from rural Pennsylvania for example, MRP can learn from the behaviour of similar respondents in similar states to make an informed estimate of how rural Pennsylvanians might vote, while retaining specific state-level effects. The modelling inherent to MRP makes it more immune to wild swings in polling merely caused by who does and does not respond to a survey (known in the industry as non-response bias).

On the other hand, this introduces an element of synthetic-ness to the MRP data, so having traditional polling conducted alongside it, in which all respondents come from the state in question, can provide a good sense check of the results.

Where we might be wrong

Turnout

We find that our registered voter samples are much more Democratic than our likely voter ones after our turnout model has been applied. It's possible that our likely voter model is penalising the Democrats too much. Our turnout model is trained on both the 2020 and 2016 elections, and we take an average of the predicted turnout for each respondent based on the two models. If turnout looks more like 2020, Harris will fare better, whereas if it looks more like 2016, Trump will.

State	Adults	Registered voters	Likely voters (2016 model)	Likely voters (2020 model)	Likely voters (final call)
Arizona	Harris +2.0	Harris +2.5	Trump +2.5	Trump +0.1	Trump +1.2
Georgia	Harris +2.1	Harris +3.5	Trump +1.5	Harris +0.3	Trump +0.6
Michigan	Harris +6.4	Harris +6.8	Harris +4.2	Harris +5.6	Harris +4.9
North Carolina	Harris +2.3	Harris +3.3	Trump +0.8	Harris +0.5	Trump +0.1
Nevada	Harris +4.1	Harris +3.8	Harris +0.6	Harris +2.4	Harris +1.5
Pennsylvania	Harris +2.1	Harris +4.1	Harris +0.3	Harris +2.4	Harris +1.4
Wisconsin	Harris +4.0	Harris +4.5	Harris +1.2	Harris +3.9	Harris +2.6

MRP attenuation bias

MRP has had some problems historically around regularisation and attenuation. For the UK general election, we deployed an 'unwinding' adjustment to account for this, which made a tangible difference to overall seat counts. Any unwinding adjustment for our US MRP, however,

would not make a difference to the overall outcome and no states would change hands, so we have opted not to take the added risk of implementing one. Some results at the extremes (e.g. District of Columbia) may display smaller leads for the Democrats than we actually see.

Late swing

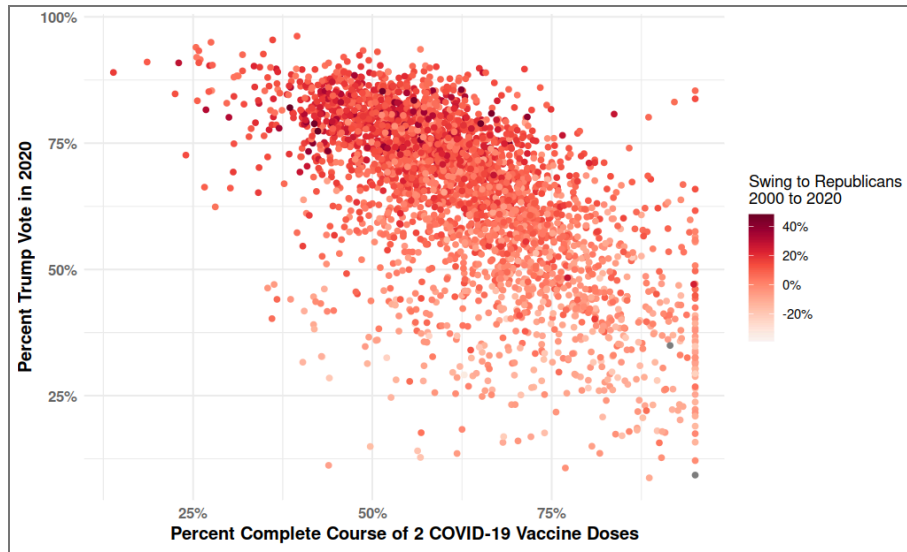
While confidence intervals are included in the data tables, please note that these are confidence intervals within each poll or MRP model itself. Our 95% confidence intervals give us an idea of the likely range of results the same poll/model would produce if we ran it again with a different set of respondents. A candidate having a lead outside the margin of error should therefore not be read as a certain victory. These intervals do not account for other sources of error, like the polls moving in the days before the election following the completion of our fieldwork.

Non-response bias

Although our polls are weighted by past vote (with an adjustment for false voting recall so we don't end up with too many 2020 non-voters), it's possible that the kinds of respondents for each party who answer our surveys differ significantly from those who do not. This is what's known in the industry as 'non-response bias'. For example, if people who have switched their vote from the last election are less likely to respond to surveys than party loyalists, our poll results may underestimate the degree of change since the last presidential election.

Trust levels / vaccination status

One theory as to the Trump polling misses in 2016 and 2020 is the high degree of correlation between the Trump base and distrust in institutions, which was tied very closely to COVID-19 vaccination status in 2020. One of the biggest predictors of Trump support in that election at the county level was the proportion of the population who had received the vaccine.



It stands to reason that people with distrust in institutions would be less likely to respond to surveys – especially when surveys so notably underestimated Trump at the last two elections, perhaps sowing greater distrust in the industry among the MAGA faithful. Although weighting by vaccination status did not alter the outcome of our polls or MRP to any significant degree, it's possible that hard-to-reach groups will surprise the pollsters once again.