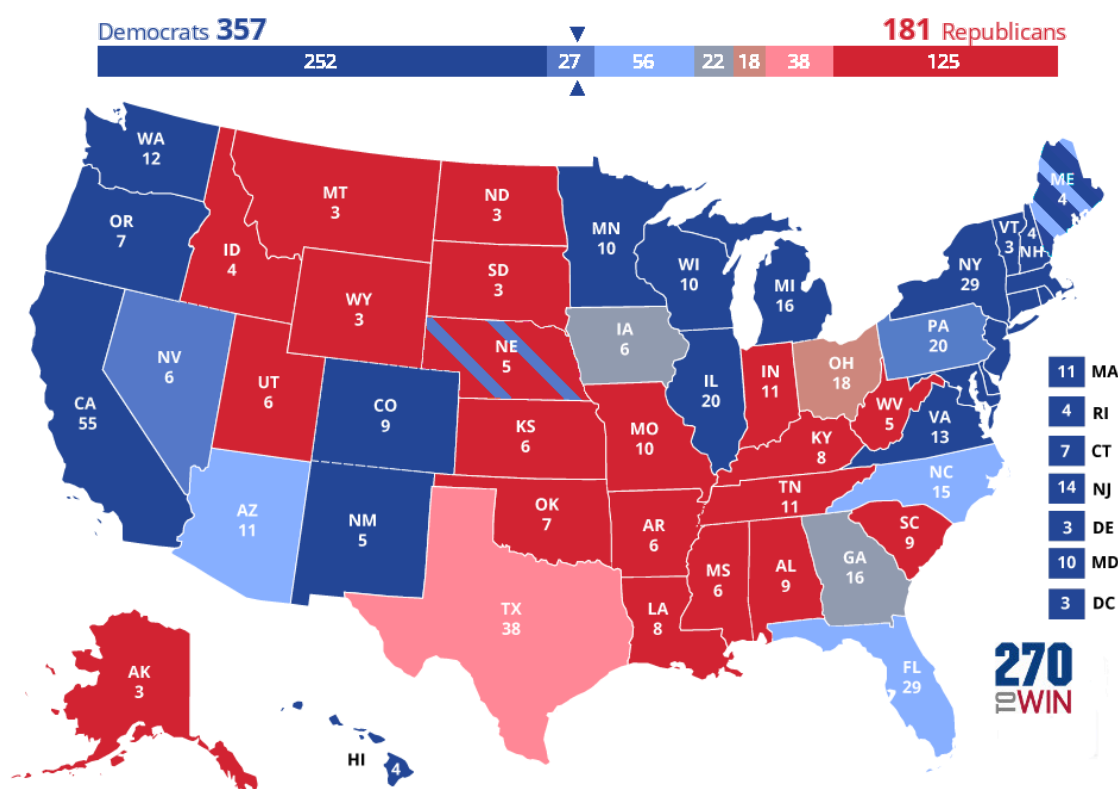


## The Last Pre-Election Estimation: A Review During the Final Hours

At midnight, [FiveThirtyEight locked their polling database](#) for this election cycle. As my model uses data from it to run and I lack the time to manually add in the flood of last second polls, it looks like this forecast is final as well. We truly have entered the final hours.

So what does it say? Right now, 88.5% of simulations show Joseph R. Biden beating Donald Trump in the electoral college by a mean of 345-192 votes, with 0.4% of simulations showing a tie. To put it in a more elegant format, here is the “No Tossups” version of the map produced by the model.



Tilt:  $\geq 65\%$  Chance of Victory    Leans:  $\geq 80\%$  Chance of Victory  
Likely:  $> 95\%$  Chance of Victory    Solid:  $\leq 95\%$  Chance of Victory

Here are the states with the winning party's chance of victory and margin of victory

<b>Solid D</b>	California (100%, D+27.8), Connecticut (100%, D+24.7) District of Columbia (100%, D+80.9), Delaware (100%, D+24.3) Hawaii (100% D+33.2), Illinois (100%, D+20.4), Maryland (100%, D+36.8) Massachusetts (100%, D+34.1), New Jersey (100%, D+22.8), New York (100%, D+30.6), Oregon (100%, D+19.5), Vermont (100%, D+34.9), Washington (100%, D+23.4), Rhode Island (100%, D+29.8)
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	Maine CD-1 (100%, D+23.3), Virginia (100%, D+12.3), Maine (99.9%, D+13.8), Colorado (99.8%, D+14.0), New Mexico (99.3%, D+10.5), New Hampshire (98.6%, D+11.1), Minnesota (98.4%, D+9.9), Michigan (96.1%, D+7.9), Wisconsin (95.6%, D+7.8)
Likely D	Pennsylvania, (94.5%, D+6.2), Nevada (92.6% D+6), Nebraska CD-2 (86.5%, D+4.3)
Leans D	Florida (77.8%, D+3) Arizona (74.8%, D+3), North Carolina (69.3%, D+2)
Tilt D	Maine CD-2 (63.8%, D+1.8), Georgia (53.6%, D+0.3), Iowa (50.2%, D+<0.1)
Tilt R	Ohio (57.7%, R+0.7)
Leans R	Texas (72.3%, R+2.2)
Likely R	None
Solid R	Montana (96.5%, R+8.4), South Carolina (97.2%, R+7.3), Mississippi (97.9%, R+14.1), Kansas (98.9% R+10), Alaska (98.7%, R+9.4) Missouri (99.1%, R+8.2), South Dakota (99.3%, R+16.4), Nebraska (99.3%, R+11), Louisiana(99.4%, R+15.5), Nebraska CD-1 (99.8%, R+13.7), Indiana (99.9%, R+9.7) Utah (100%, R+15.3), Tennessee (100%, R+14.9), Alabama (100%, R+18.8), Arkansas (100%, R+20.3), Kentucky (100%, R+17.8), North Dakota (100%, R+22.0), Idaho (100%, R+21.9), Oklahoma (100%, R+23.4), West Virginia (100.0%, R+29.6), Wyoming (100%, R+35.6), Nebraska CD-3 (100%, R+47).

Important to note that these percentages are not guarantees, they just quantify the chances of a win occurring. Even the “100%” chance states are more like 99.999...%.

In short, Trump seems to be in trouble.

To win a second term, Trump’s best bet was to emulate what he did in 2016; win the Sun Belt (save California and New Mexico) and repeat his performance in the Rust Belt, specifically his upsets in Wisconsin, Michigan, and Pennsylvania. Perhaps he could even make himself competitive in states he narrowly lost, like Maine (Clinton +2.9) Nevada (Clinton+2.4), Minnesota (Clinton+1.5) and/or New Hampshire (Clinton+0.4).

Regardless, he didn’t even have to focus on those states, his electoral college win was large enough (74 EVs but *technically* 77 due to faithless electors) that he could repeat his 2016 result, lose Michigan and Pennsylvania but still win 270-268.

As the polls have come in and time has passed, it very much seems as if (but is **not** a guarantee that) Trump faces many complications with this plan.

Let's take a look at the key battlegrounds:

Maine has been won by the Democratic candidate during every presidential election since 1992. In 2016, as mentioned prior, the margin was rather close (Trump also won the 2nd congressional district), so there were questions about whether or not it would become more competitive, especially considering the fact that the prior midterm elections had the GOP winning statewide races. But 2018's midterms showed Democrats doing well, and polling has shown Biden with a strong lead there, so the model shows the same.

Colorado, New Mexico, and New Hampshire all used to be competitive states in previous elections (in fact, Colorado was the tipping point state in 2012, George H.W. Bush won New Hampshire in 2000, and New Mexico went for him in 2004). But over time, they have trended more blue, and despite Clinton's underperformance in the Granite State as mentioned before, they all have steadily trended blue over the years, to the point where Biden is projected to have fairly large margins in their popular vote totals; all of them are forecasted to go for him by >10pts.

Minnesota has gone for the Democratic candidate in presidential elections every time since 1976, but was yet another close state in 2016, and questions similar to the ones about Maine also arose. This year, the polls again suggest that this state will go into Biden's column.

Michigan was one of shock upsets that Trump had in 2016, and needs one again this cycle. Biden appears to be in front here, with 96.1% chance of winning and a 7.9 margin of victory.

Next we look at Wisconsin, Trump's "must not lose" state. After his 2016 shock upset, he seems to be in danger of doing exactly that. As Nathaniel Rakich of FiveThirtyEight wrote, the state has never really been safe blue, but the model sees Biden winning 95.6% of the time and a victory margin of 7.8pts.

Pennsylvania once again seems to be important as the forecast model thinks that it is the most likely tipping point state (48.1% of simulations); the state that gives the eventual winner their 270th electoral vote. It estimates that Biden leads by 6.2 and has a 94.5% chance of winning. It's grown more competitive as the election has grown nearer.

[Nevada](#), one of the 2016's closest races, is considered by the model to be more competitive than any of the states mentioned before. This is mostly due to the slightly smaller margin there (D+6) and the variance we have seen in the polls overtime. Still, it is likely we will see this state go for Biden.

Trump won [Nebraska CD-2](#) in 2016, thereby clinching all the electoral votes from the state of Nebraska. Now he is in danger of losing it. [Leaving many stranded on an Omaha airfield in freezing temperatures](#) six days before the election certainly didn't help, and the model sees Biden with a 86.5% chance of winning and leading the forecasted vote share by 4.3pts.

[Florida](#), a state that is infamous for razor thin margins and super long recounts. Except, at least this year, that might not be the case; the Sunshine State has a robust absentee voting system and could be one of the first to release results, which could be a key indicator of who is leading nationwide. The model shows that Biden is doing so right now with a 77.8% chance of winning and a 3 point advantage in the forecasted vote share.

[Arizona](#) could see itself flip to the Democratic candidate for the first time since 1996, as Biden has a 74.8% chance to win there and leads the forecasted vote share by 3 points. [North Carolina](#) went for Obama in 2008 before Romney won it back in 2012 and Trump in 2016. It's competitive once again, though Biden has the better chance (69.3%, 2pt MoV).

[Maine CD-2](#) went for Trump in 2016, and this year it is still a close race. To complicate things even further, Maine uses [ranked choice voting](#), so if a candidate cannot get to 50%+1 vote, the last place candidate has their votes distributed to their voters' next choice to the remaining ones until a majority winner is determined. While Biden has a 63.8% chance of winning and is forecasted to have a 1.8 pt margin of victory, both Trump and he are expected to get less than 50%.

[Georgia](#) (along with Texas) seemed to be the state that Democrats insisted every election year was "turning purple". I used to be skeptical about this, but after Democrat Stacy Abrams' narrow 1.4pt loss to Republican Brian Kemp in the 2018 Georgia gubernatorial election, this seemed to have some evidence for it. Now, looking at the polling data, there is. Will it be enough though? The model thinks so, but it's very close; Biden wins in 52.6% of the simulations and a forecasted victory margin of 0.3pts.

[Iowa](#) is a competitive state most years and is politically significant during both the general and primary seasons (RIP the 2020 Democratic Caucus, amirite?). In 2008 and 2012 it went for Obama, but then flipped to Trump in 2016 by a larger margin than Obama managed. But right now the only way to describe how the model characterizes it is a pure tossup. The model shows Biden winning Iowa 0.2% more times than Trump in the simulations, and he leads the forecasted vote share by <0.1%.

[Ohio](#) prides itself in being the national bellwether; it has gone for the winning candidate every time since 1964, but this year, the model believes that streak may be broken. Trump has a 57.7% chance of winning there, and the model sees him winning by 0.7 points.

[Texas](#) was mentioned prior as a potential “purple state”, and while in 2018, Democrat Beto O’Rourke lost by 2.6pts to Republican Ted Cruz for his senate seat, the model believes that the margin will be similar for Trump, which sees him winning the Lone Star State by 2.2pts and in 72.3% of simulations. Still, this is a quite unusual state to see so competitive

Now here’s the thing, out of these states I mentioned, only **\*two\*** are forecasted to be won by Trump. And while a valid case can be made for flipping GA and IA for Trump’s column, it is rather clear that Biden has quite a significant leg up in the battleground races, which is shown if you organize the model’s state data by chance of winning.

Maine (S)	99.9%	0.1%	-13.8
Colorado	99.8%	0.2%	-14.0
New Mexico	99.3%	0.7%	-10.5
New Hampshire	98.6%	1.4%	-11.1
Minnesota	98.4%	1.6%	-9.9
Michigan	96.1%	3.9%	-7.9
Pennsylvania	94.5%	5.5%	-6.2
Wisconsin	95.6%	4.4%	-7.8
Nevada	92.9%	7.1%	-6.0
Nebraska CD-2	88.0%	12.0%	-4.9
Florida	77.8%	22.2%	-3.0
Arizona	74.8%	25.2%	-3.0
North Carolina	69.3%	30.7%	-2.0
Maine CD-2	62.6%	37.4%	-1.8

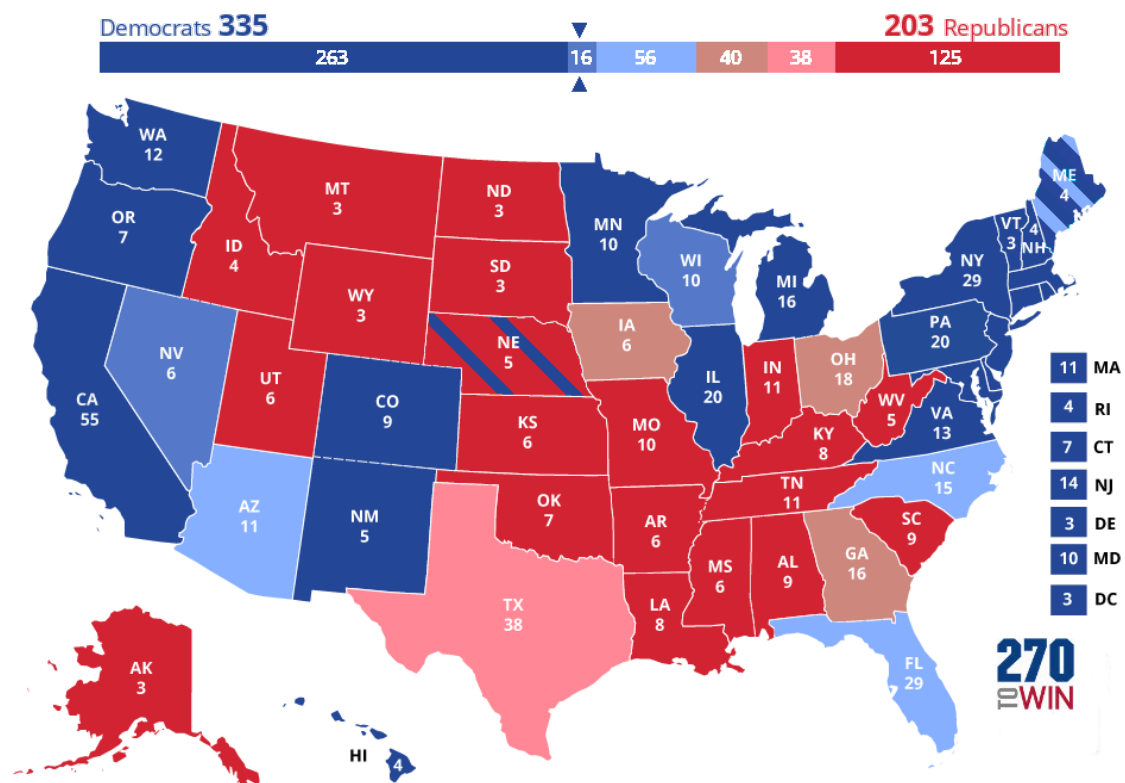
Georgia	52.6%	47.4%	-0.3
Iowa	50.2%	49.8%	0.0
Ohio	42.3%	57.7%	0.7
Texas	27.7%	72.3%	2.2

Now before you say “POLLING ERROR” it is important to mention that while yes, polls are not infallible, there are many indications that the crumbling which occurred to Hillary Clinton’s campaign in the last parts of the 2016 race are not being seen this year.

For example, Dave Wasserman of the Cook Political Report noted how in 2016, there were [clear signs at the district level](#) that Clinton was in trouble with white working class voters, the same demographic that would hand her crippling losses in the Midwest. This year, [the district level polls are more or less in line with the national ones](#), which show that Trump is underperforming by significant margins.

Moreover, one of the main reasons the state polls were so poor was because pollsters didn’t weight well by education, and non-college educated voters were more likely

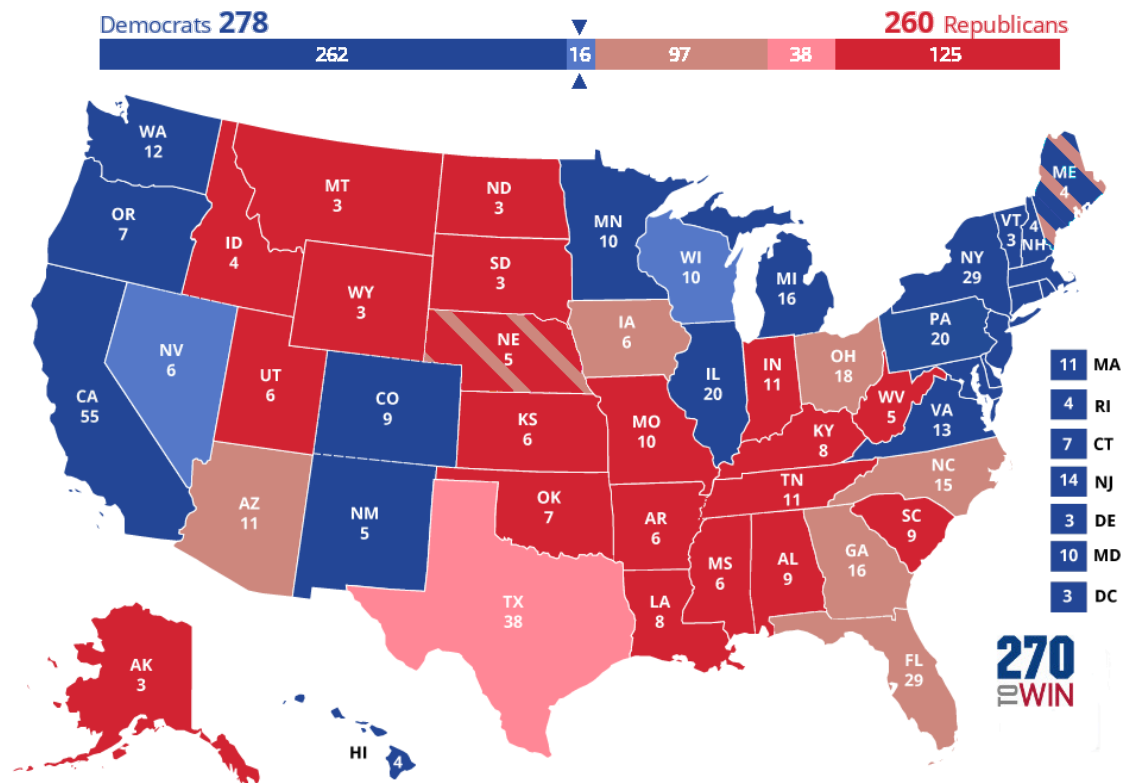
Biden’s easiest path to 270 looks pretty straightforward



The formula is simple, flip the states Clinton lost: WI, MI, and PA. To gain a lead, he could also win Florida and North Carolina, two states that Obama won along with the previous three in 2008 (and 2012 except for NC). Lately, Biden and Co., bolstered by their strong numbers in those states, have been trying to expand their map by campaigning in states such as Texas, Georgia, Iowa, and Arizona. The fact that we are even mentioning TX and GA, Republican strongholds for the last decade, as competitive states just shows how much of an advantage Biden seems to have garnered.

Trump's easiest path to reelection is anything but.

It's *possible*. Georgia is basically a coin toss, so it could go for either candidate. Biden's leads in [Arizona](#), [Florida](#), [Maine CD-2](#), and [North Carolina](#) are within the forecast's range of vote shares, so that could flip over to Trump if the President has a good night. Let's add NE CD-2, even though it barely has a Trump win in it's range.

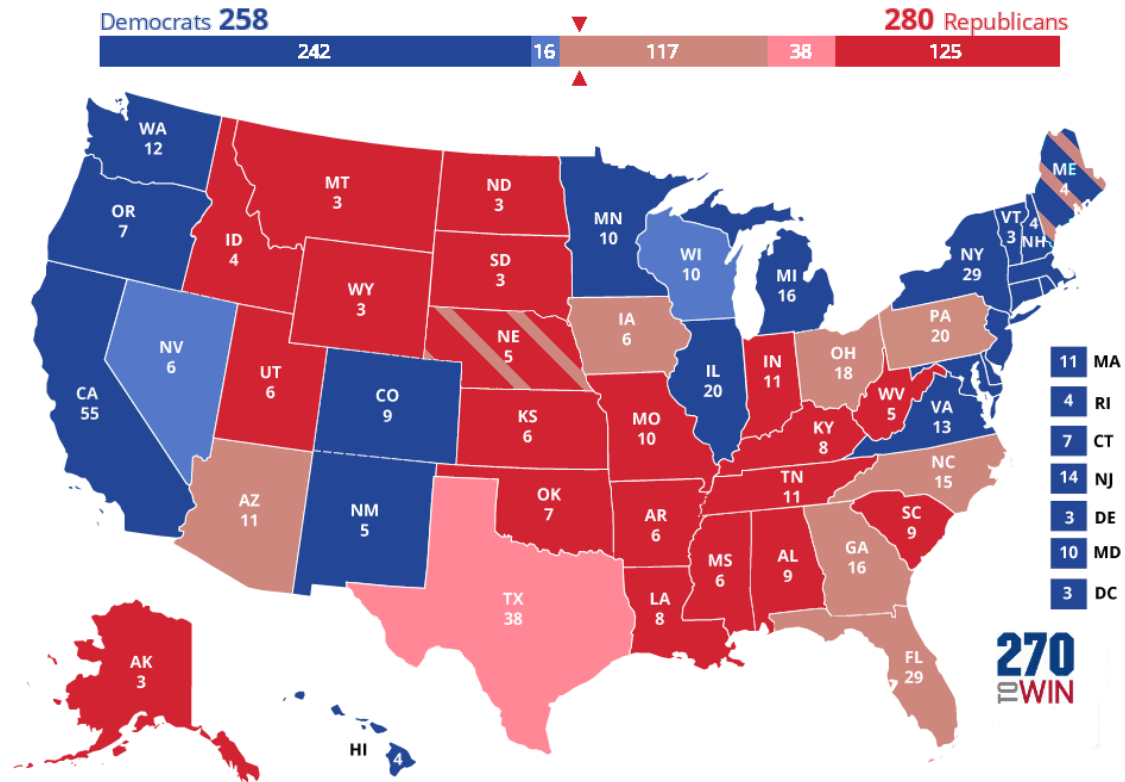


Along with the other states the model sees him leading, that gives Trump 260 electoral votes. That's close, but not a win. He needs another 10.

Pennsylvania seems to be the next suspect as it is important for both candidates. But the forecast margin there is Biden+6.3, well above the range of vote shares and a major



reason (along with the stability of the polls) he has a 94.5% chance of winning the state. Compare that to the chances for the previously mentioned states, which ranged from 53% to 77% (88% if you include NE-2), and you can see why this would seem more improbable.



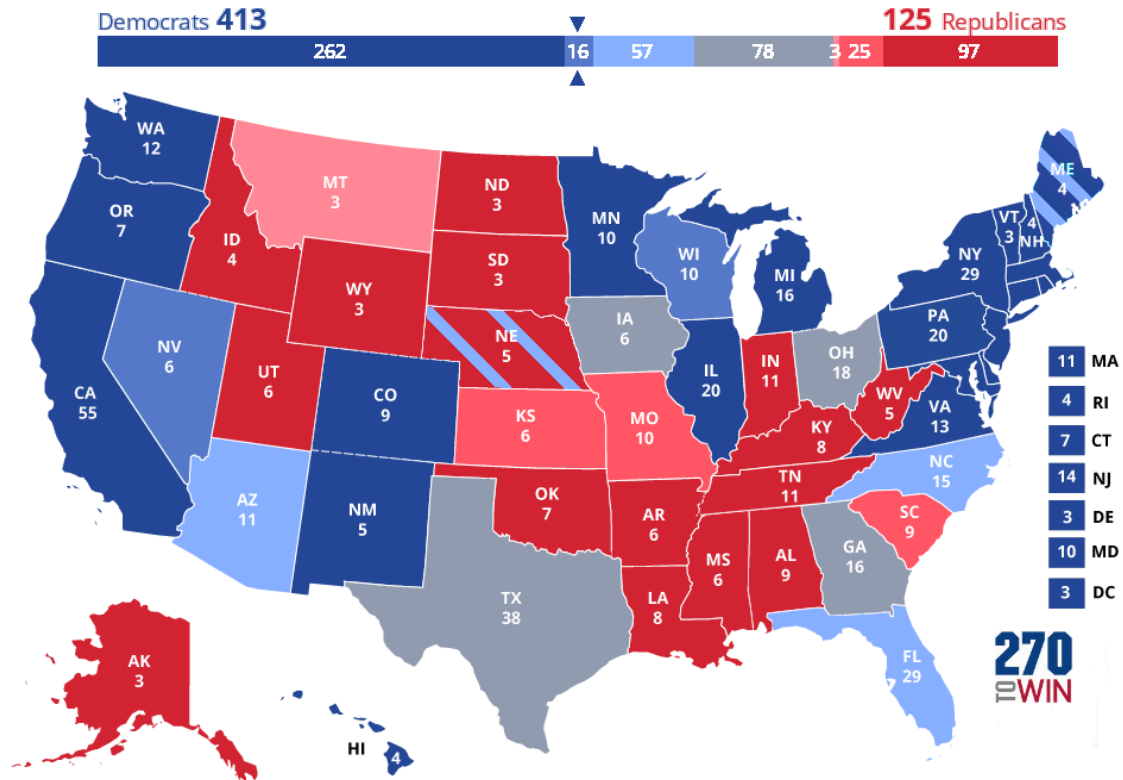
...It still is possible though. 5.5% of the model's simulations had Trump winning the state. And if there is one thing that we all learned from last time, "improbable" does not mean "impossible". This map becomes especially difficult for Biden, as there are no other states that can replace it for him, and underperformance is likely to propagate through the electorate.

But let's zoom out for a bit. For this to reasonably happen, we would need reasonable polling errors in ~4 races, a big one in NE CD-2 and a *large* one in PA.

Again, this isn't impossible. One of these predictions being wrong is expected. Two, still likely. But 5 misses, especially after the fixes from the previous times and the lack of district level indications? Again *possible*, but more unlikely than not.

And who's to say such polling errors have to go Trump's way? If the errors go Biden's way, Ohio and Iowa would flip. Texas would as well since his forecasted margin of victory is within the range of results, which makes the map more commanding for Biden.





Suddenly, states like Montana, South Carolina, Missouri, and Kansas now come into play.

Therein lies the crux of the problem for the president. The range of reasonable electoral college vote shares goes from a slight Biden win (Biden+21 EVs) to a **huge** Biden win (Biden+288), with the median still being a healthy margin (Biden+164). In layman's terms, ***Trump's best chance of victory lies on the edge of a reasonable polling error, and would have to be larger than 2016's in order to see him win (fairly).***

Still, ***Donald J. Trump has a path to victory.*** 12.5% is not 0%, and as the results come in, we mustn't forget that.

Also, it is VERY IMPORTANT to wait until official outlets, such as [AP Politics](#) for election calls and stay away from unvetted sources, even if you like what you see.

I spent way too much time on this thing. You're still reading? Great! Below is my non-model based forecast for the Senate.

