

What Polls Are Trying to Tell Us



January 2021

This deck presented by Future Majority and our partner Change Research is a starting point to answer one of the serious questions coming out of the 2020 election: “why were the polls wrong?”

The data analyzed looks at:

- **Trends over the past 6 years;**
- **What is driving the vote;**
- **A deeper look at the DNA of voters;**
- **Recommendations**

The data reveals several key points to keep in mind as you read through this deck:

- **Polling (Democrat, Republican, and independent) gets the Democratic vote share essentially correct. However, polling continues to underestimate the Republican vote share by a lot. And if a Democrat is not near or above 50 percent the wave topples them at the end. This also happens in non-Trump elections.**
- **Pure Independent voters, who are key to winning general elections in tough states dislike everyone by nature; however, they really dislike Democratic leaders and the Party. In other words, they lean right. They need convincing.**
- **The three main drivers of the vote play to the Republican strength by perception: economy, putting U.S. interests first, and personal freedoms.**
- **Putting justice above freedom is not a winner for Democrats as the Independent voter sides with Republicans on these key values and the words aligned with them.**
- **Note: Taking the congressional district tracking poll closest to election day in 49 districts, the average missed the Democratic vote share by 1.9% and the Republican vote share by 6.2% (Source: HMPAC)**

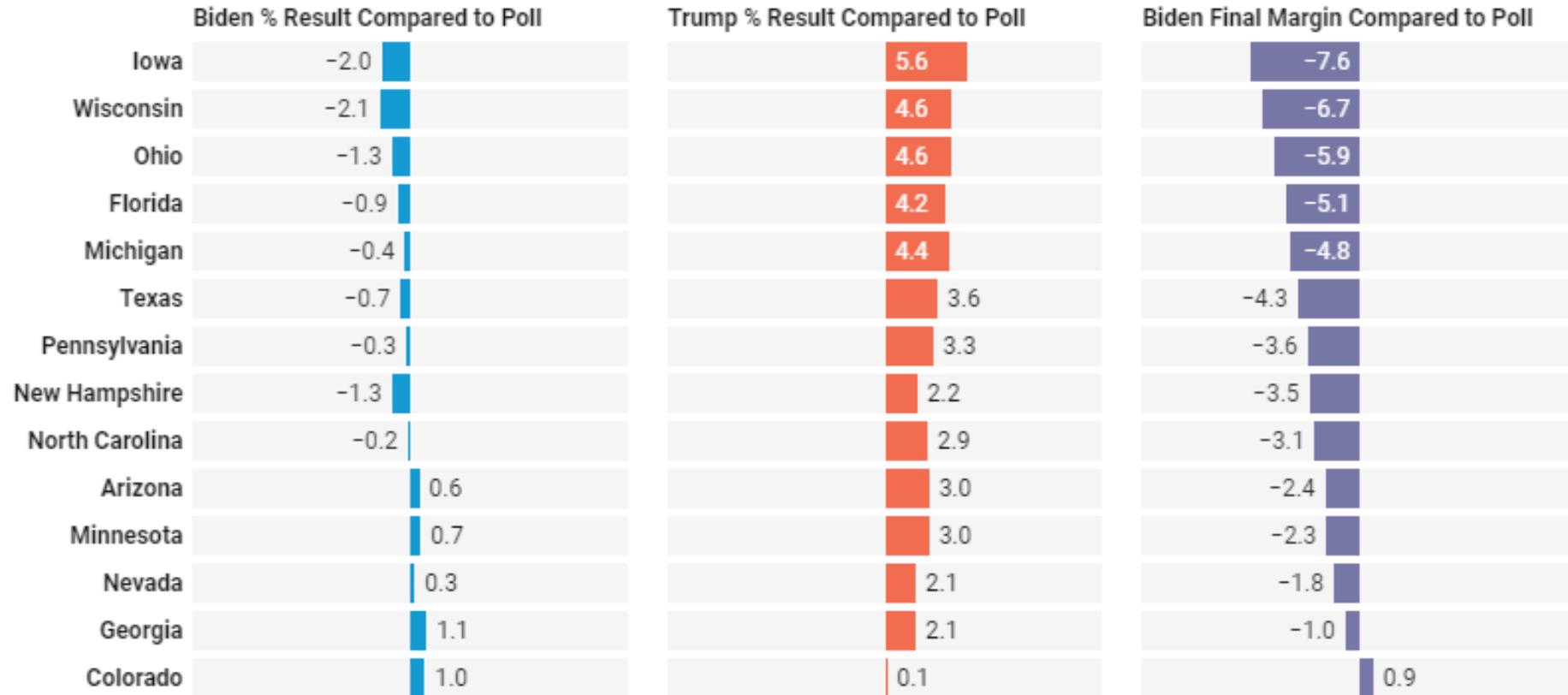
Recommendations:

- **Adjust polling budgets away from messaging to base voters and do many more interviews with people – mostly independent voters - who dislike both parties to drive the strongest contrasts with the GOP. Trust independent groups to turn out voters.**
- **Focus on economic issues that voters care about and their values that drive their choice. Focus on the working class (Biden's personal story, allowed independents to identify with him.)**
- **Frame the Democratic in terms of a vision of “freedom” (such as “more access to health care gives you the freedom to start a business.”) We know that freedom dominates the Republican mind, however, it is also a major driver of the Independent vote.**

In 2020, publicly released polls properly estimated Biden’s vote share. However, they once again underestimated Trump’s vote share.

2020 President Poll Comparison

Final Results Compared to Public Polling Average in the Last Three+ Weeks (10/14 to 11/3)

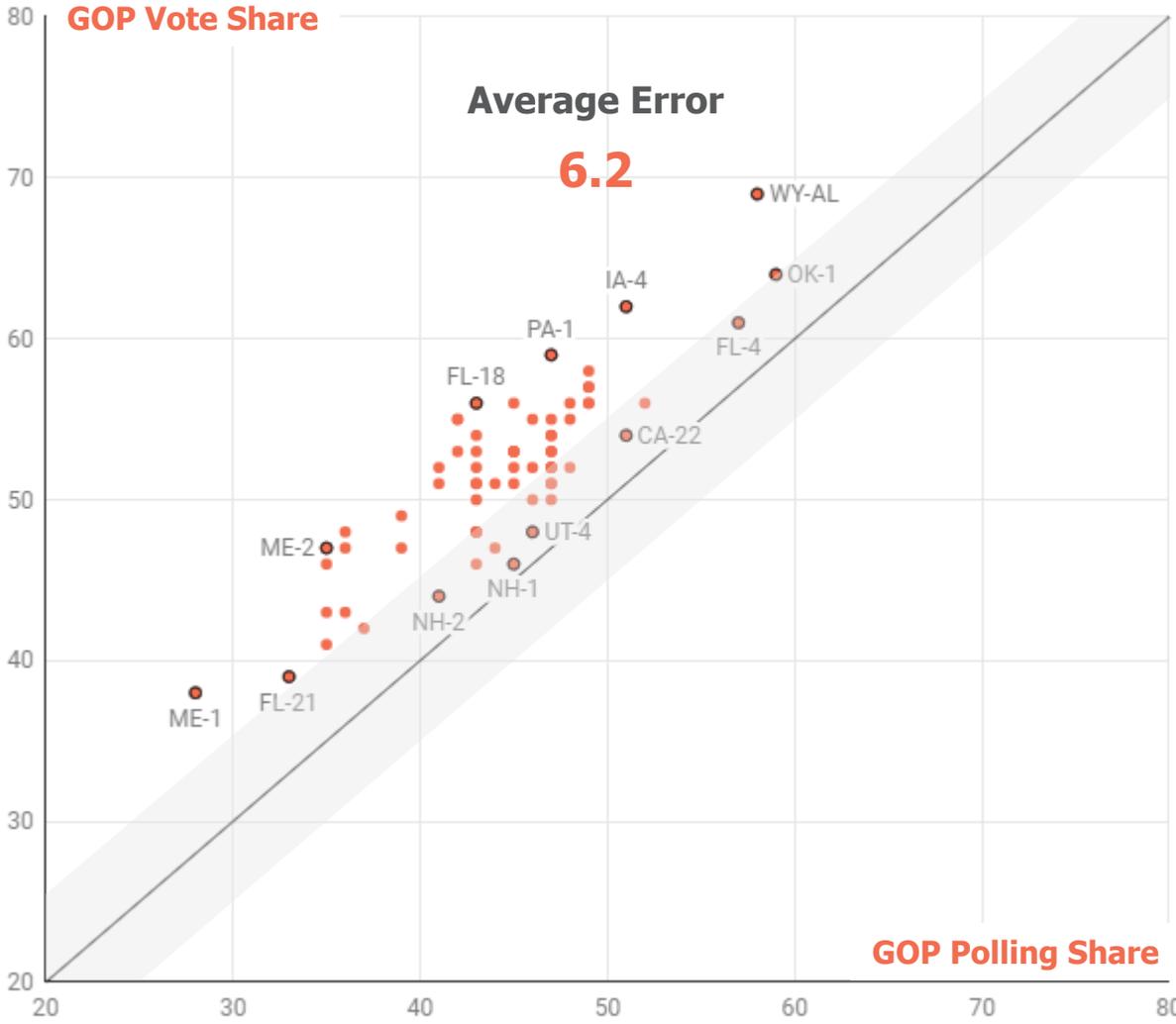
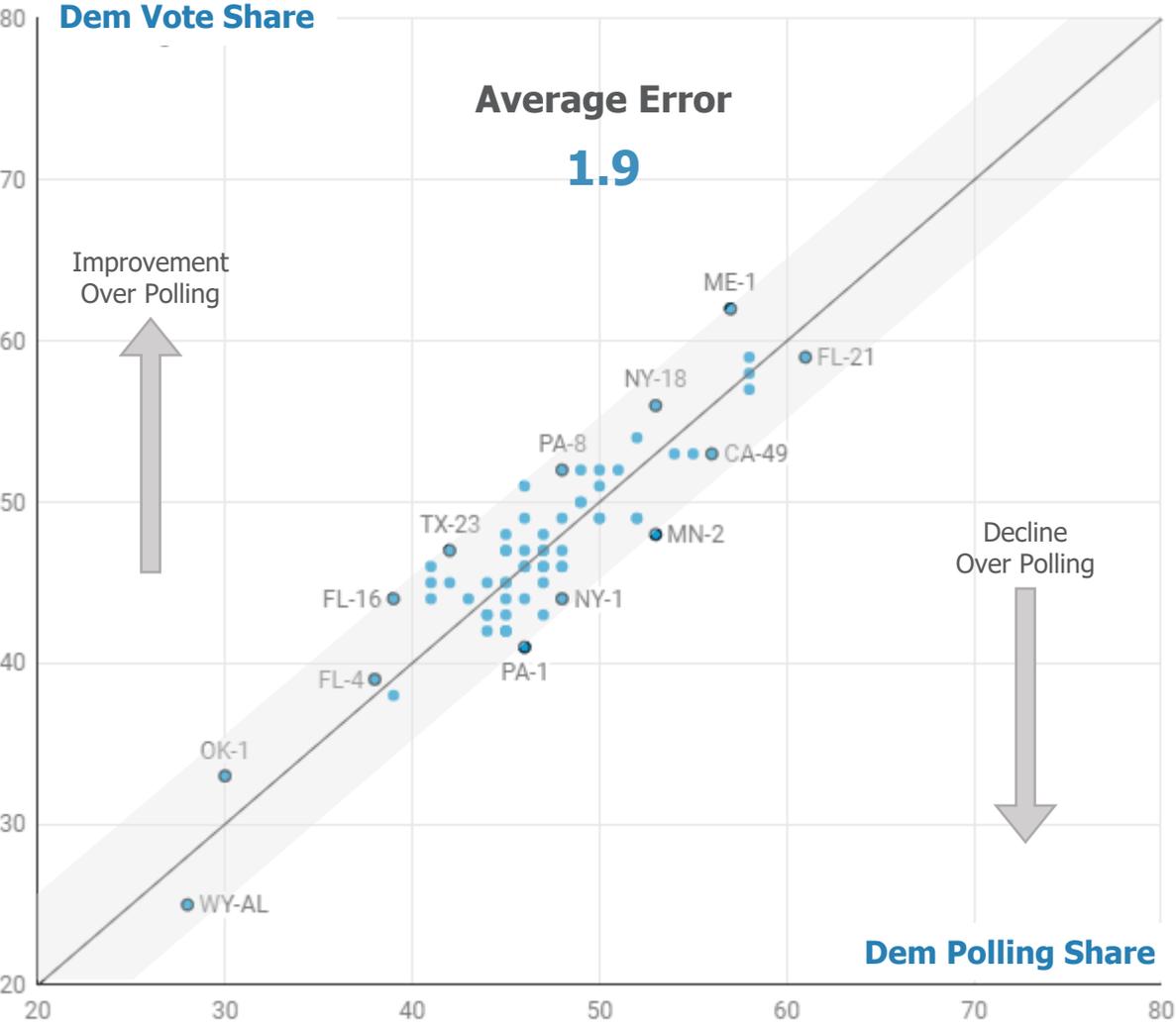


Average Error -0.4

3.3 (8x Dem polling error)

House public polling showed the same pattern (D correct, R not) in 2020...

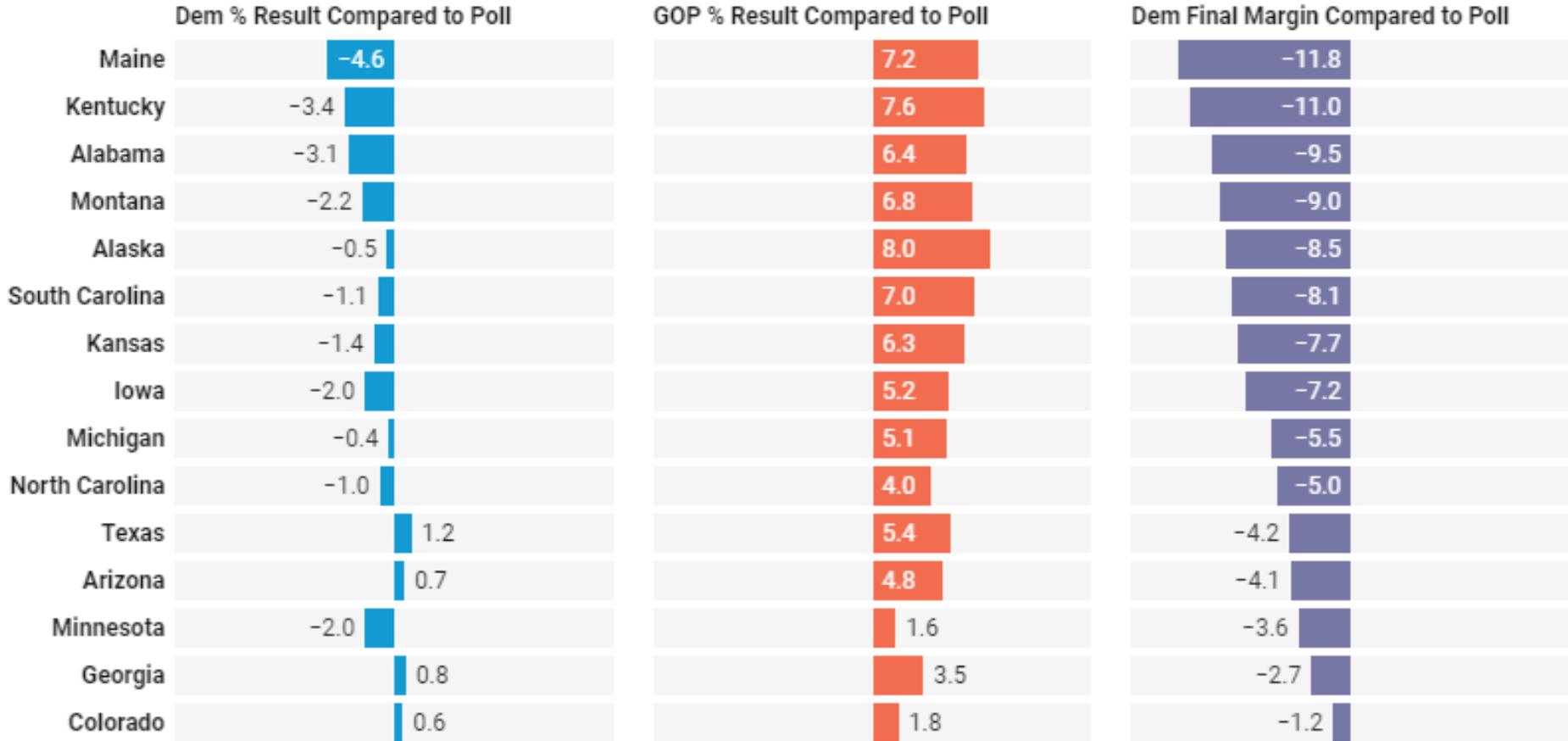
2020 U.S. House Comparison of top 49 Districts



2020 Senate Polling: Same problem

2020 U.S. Senate Poll Comparison

Final Results Compared to Public Polling Average in the Last Three Weeks (10/14 to 11/3)



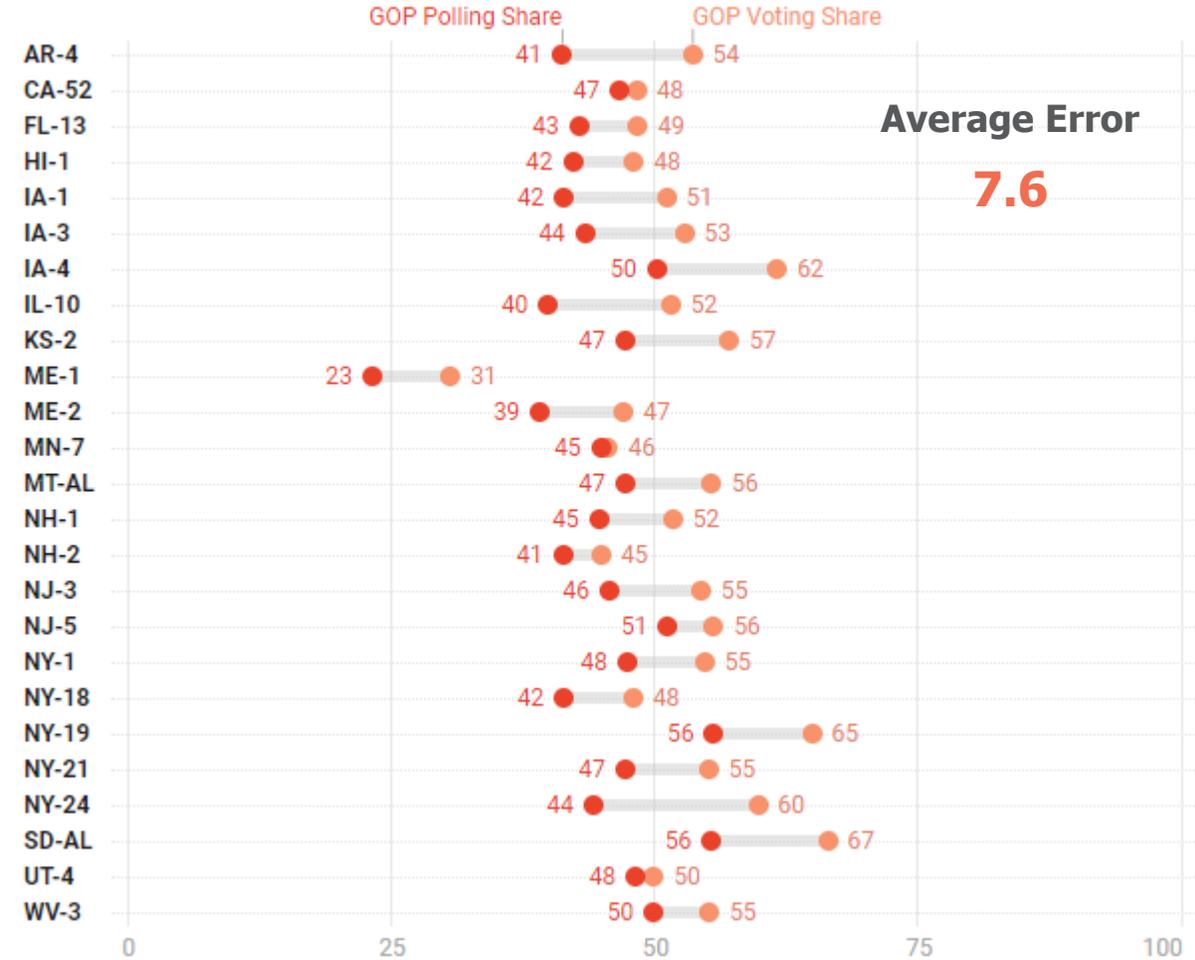
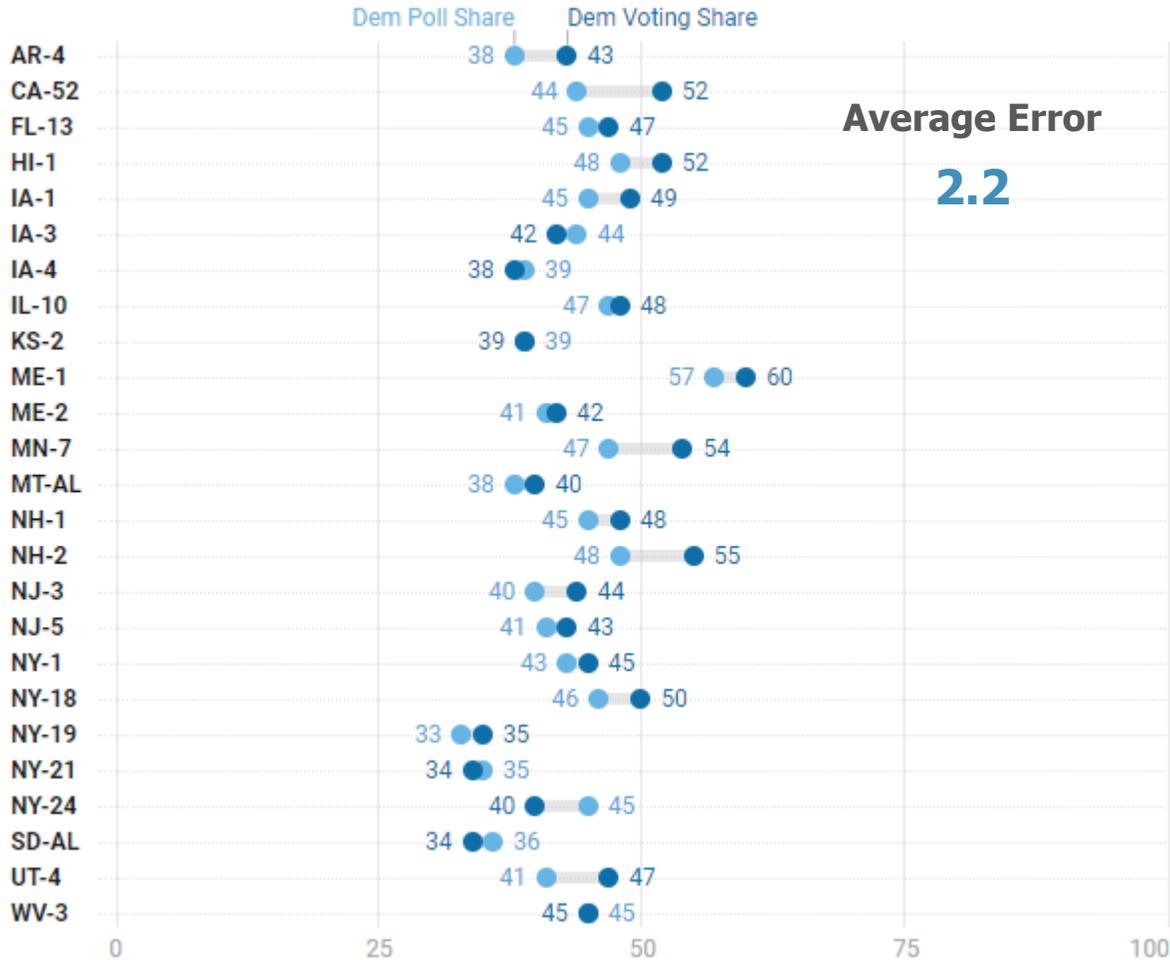
Average Error

-1.2

5.4

Despite common wisdom, the public polling has underestimated GOP support going back all the way to the 2014 House races, in other words for four cycles

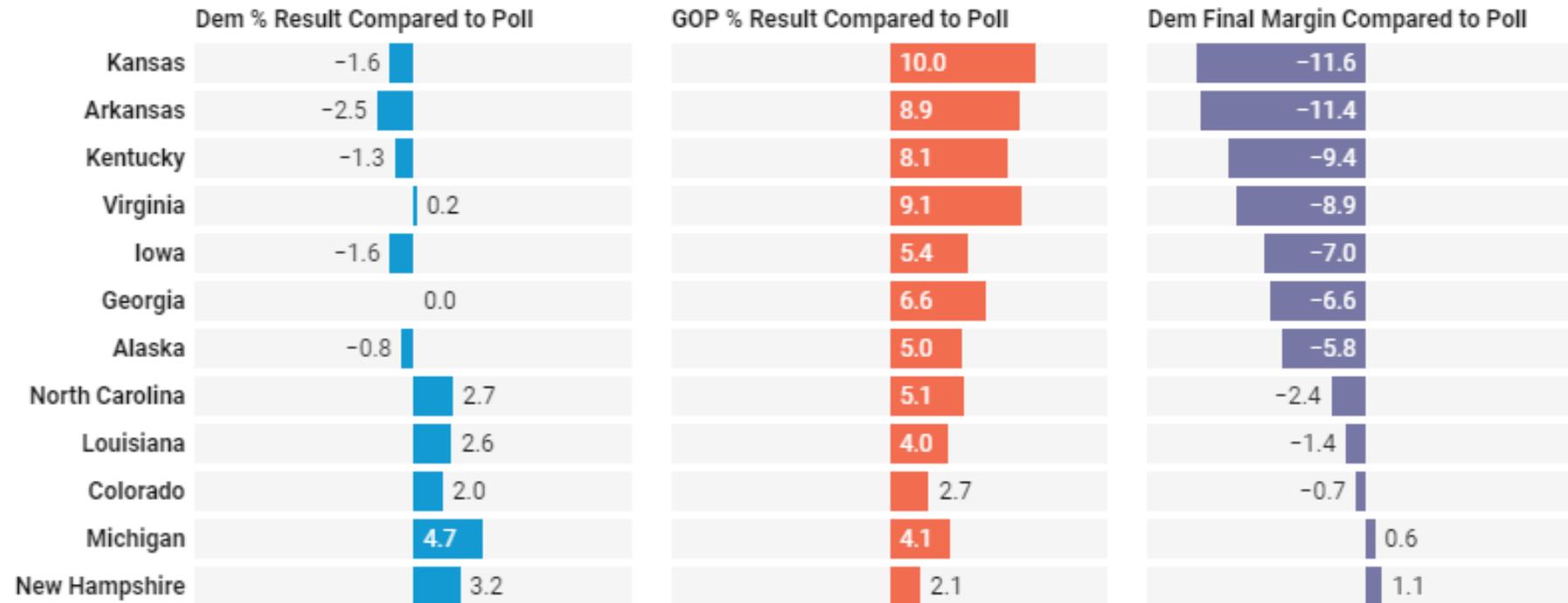
2014 U.S. House Comparison



Once again, with the 2014 Senate races

2014 U.S. Senate Poll Comparison

Final Results Compared to Public Polling Average in the Last Three Weeks (10/14 to 11/4)



Average Error

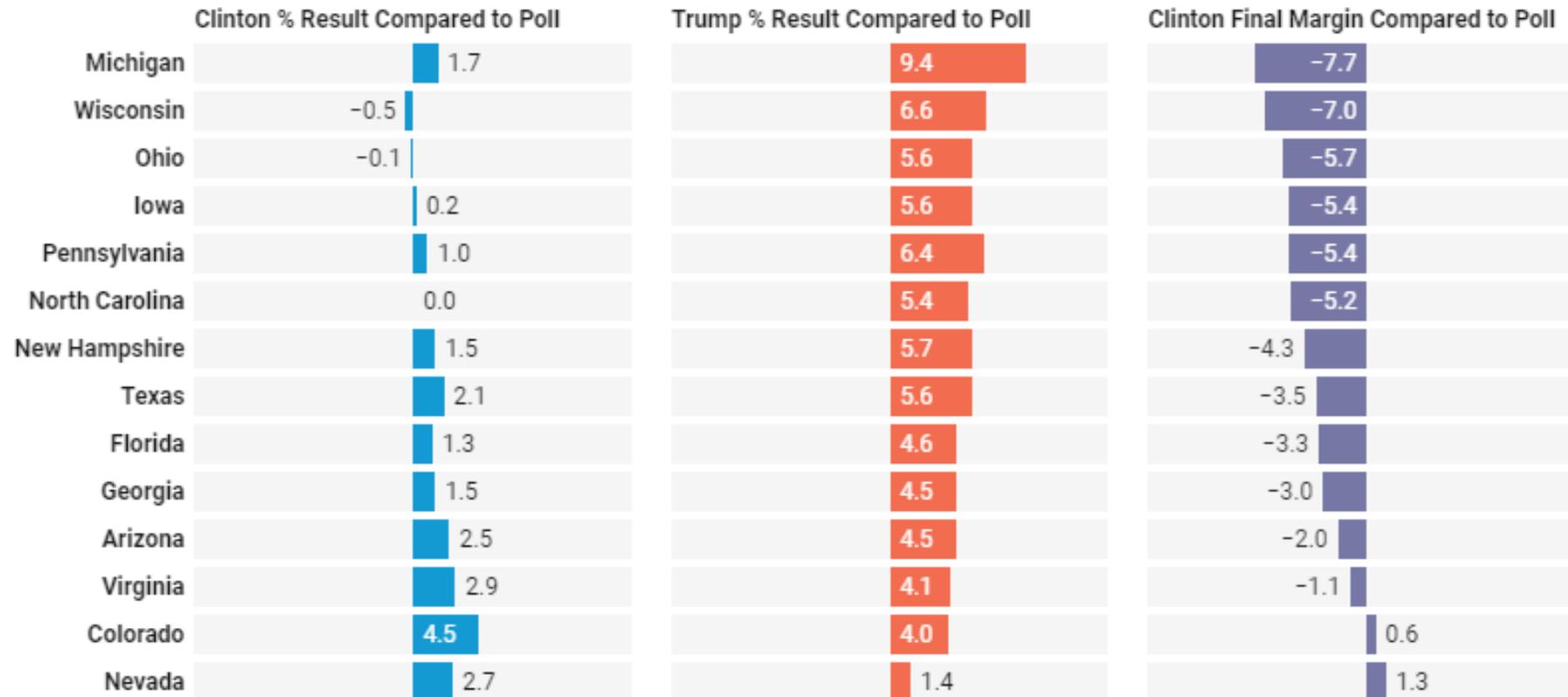
0.6

5.9

In 2016, public polling estimated Hillary's share closely but again very much underestimated Trump. Though 2016 was *not* the start.

2016 President Poll Comparison

Final Results Compared to Public Polling Average in the Last Three+ Weeks (10/15 to 11/8)



Average Error

1.5

5.2

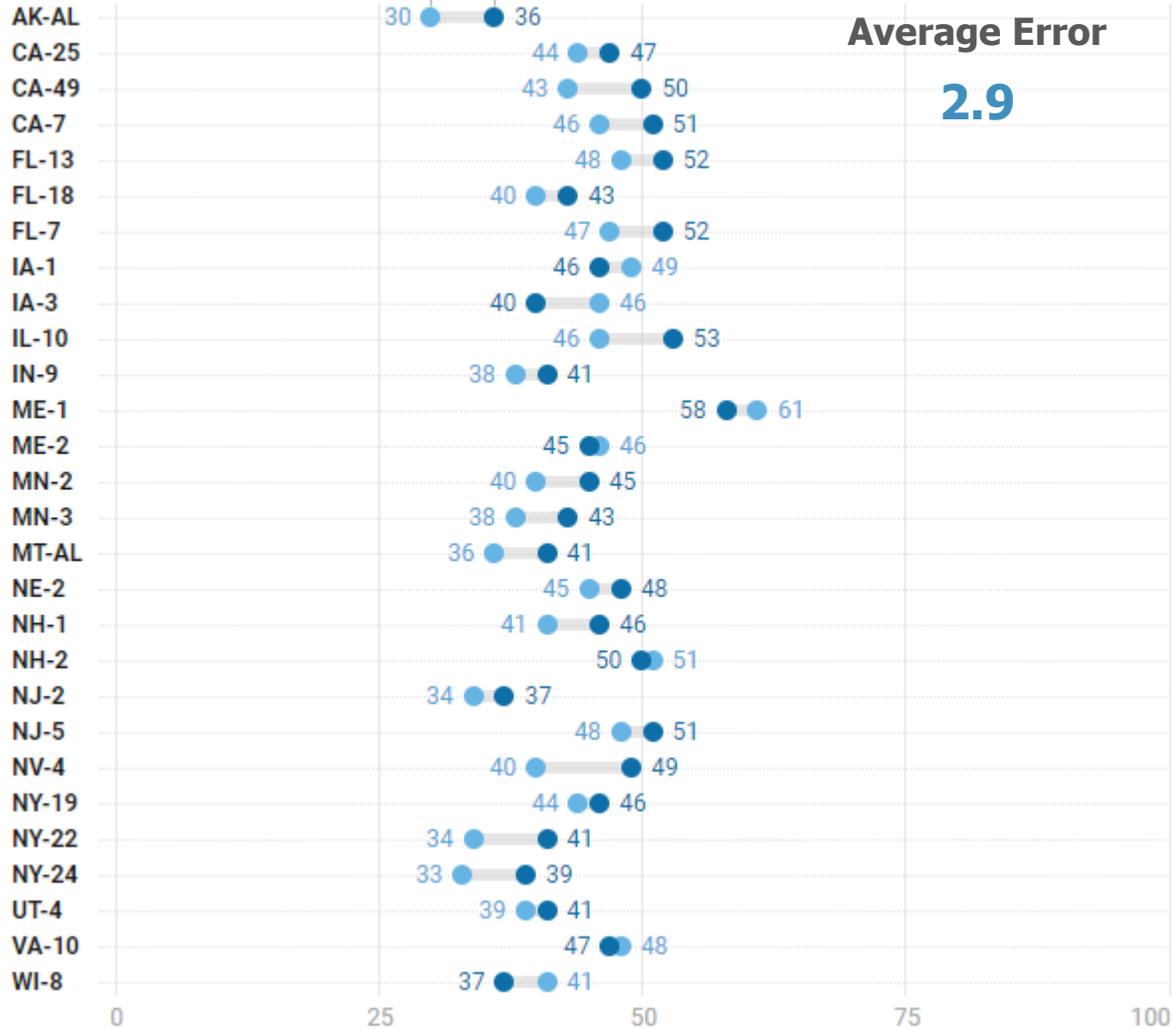
The same pattern held in the 2016 House races, reflected by lack of gains

2016 U.S. House Comparison

Dem Poll Share Dem Voting Share

Average Error

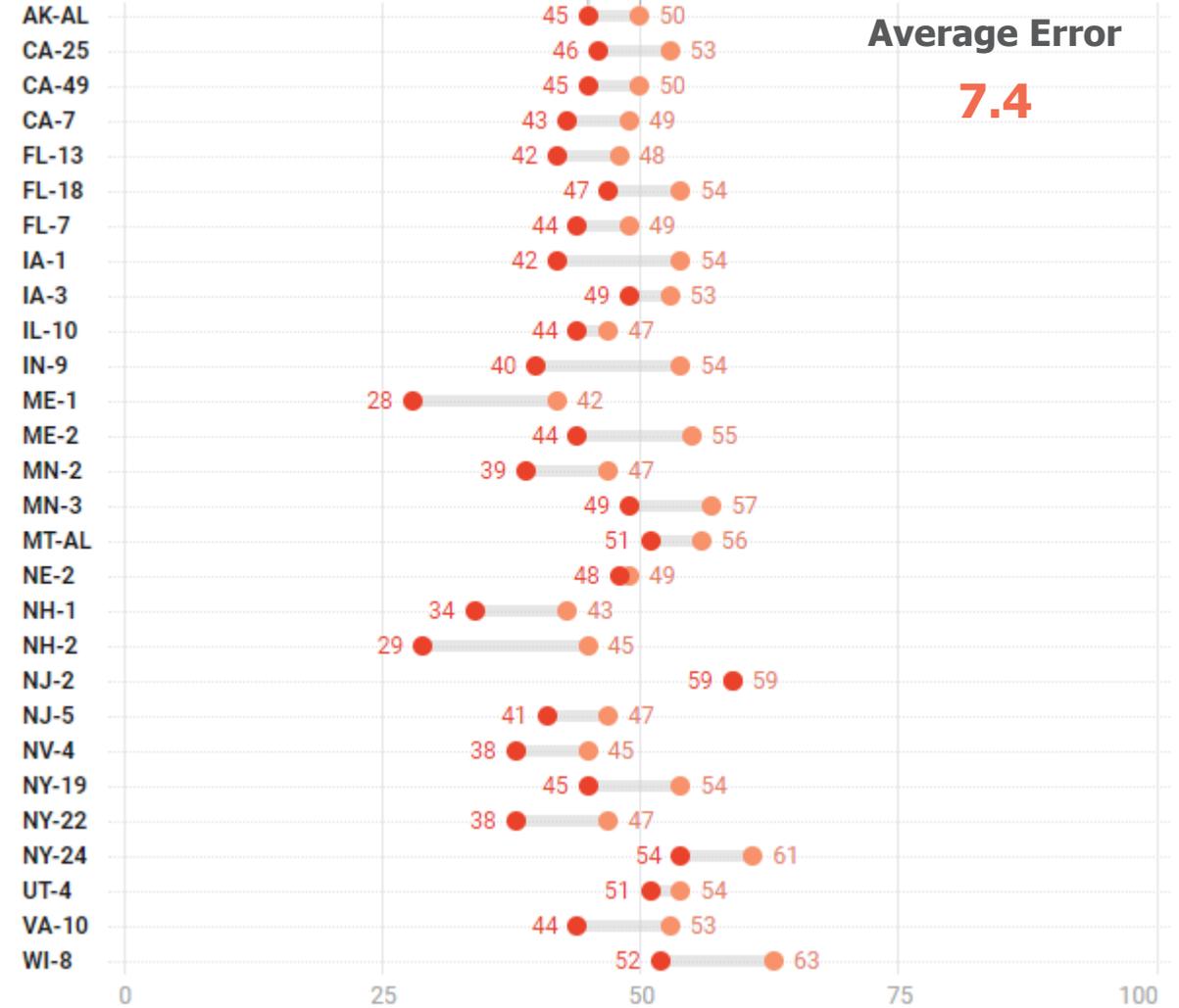
2.9



GOP Polling Share GOP Voting Share

Average Error

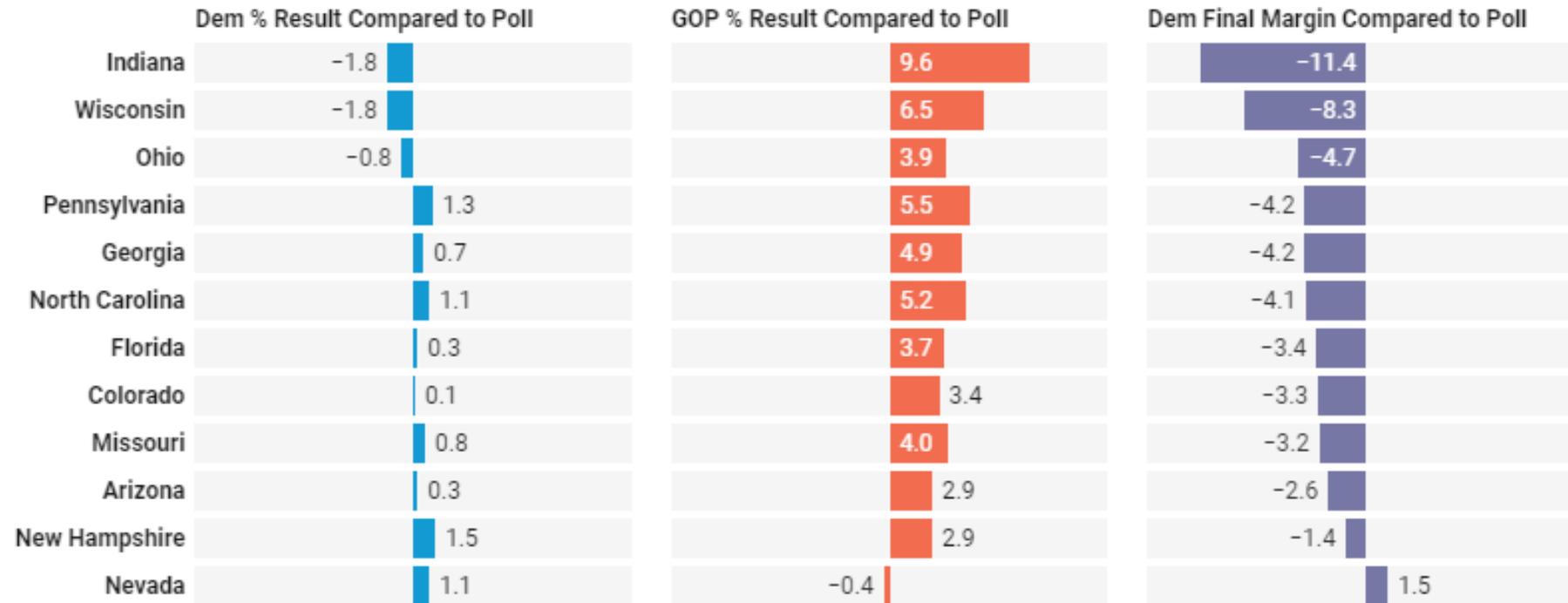
7.4



This is getting old: the 2016 Senate races

2016 U.S. Senate Poll Comparison

Final Results Compared to Public Polling Average in the Last Three+ Weeks (10/15 to 11/8)

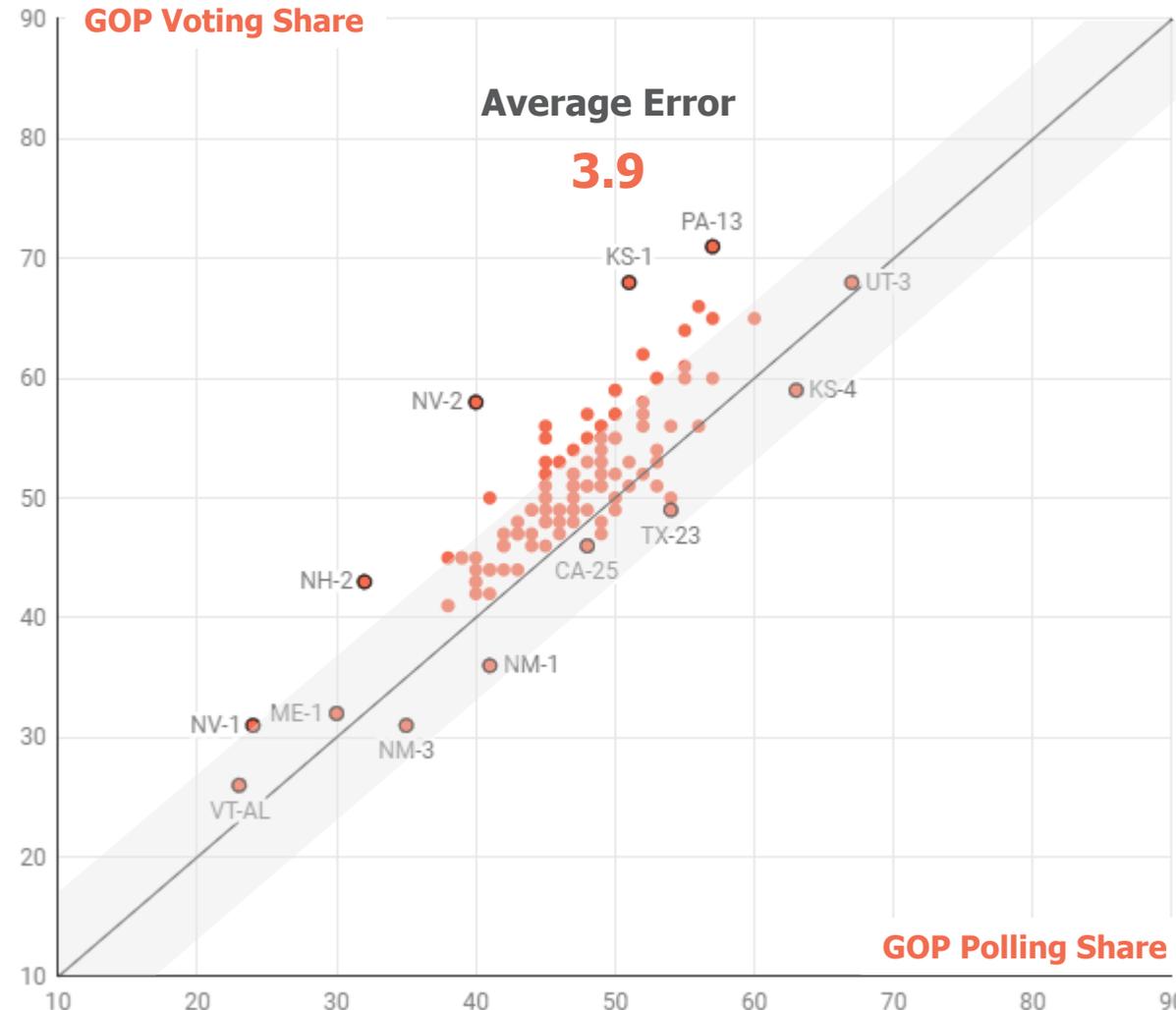
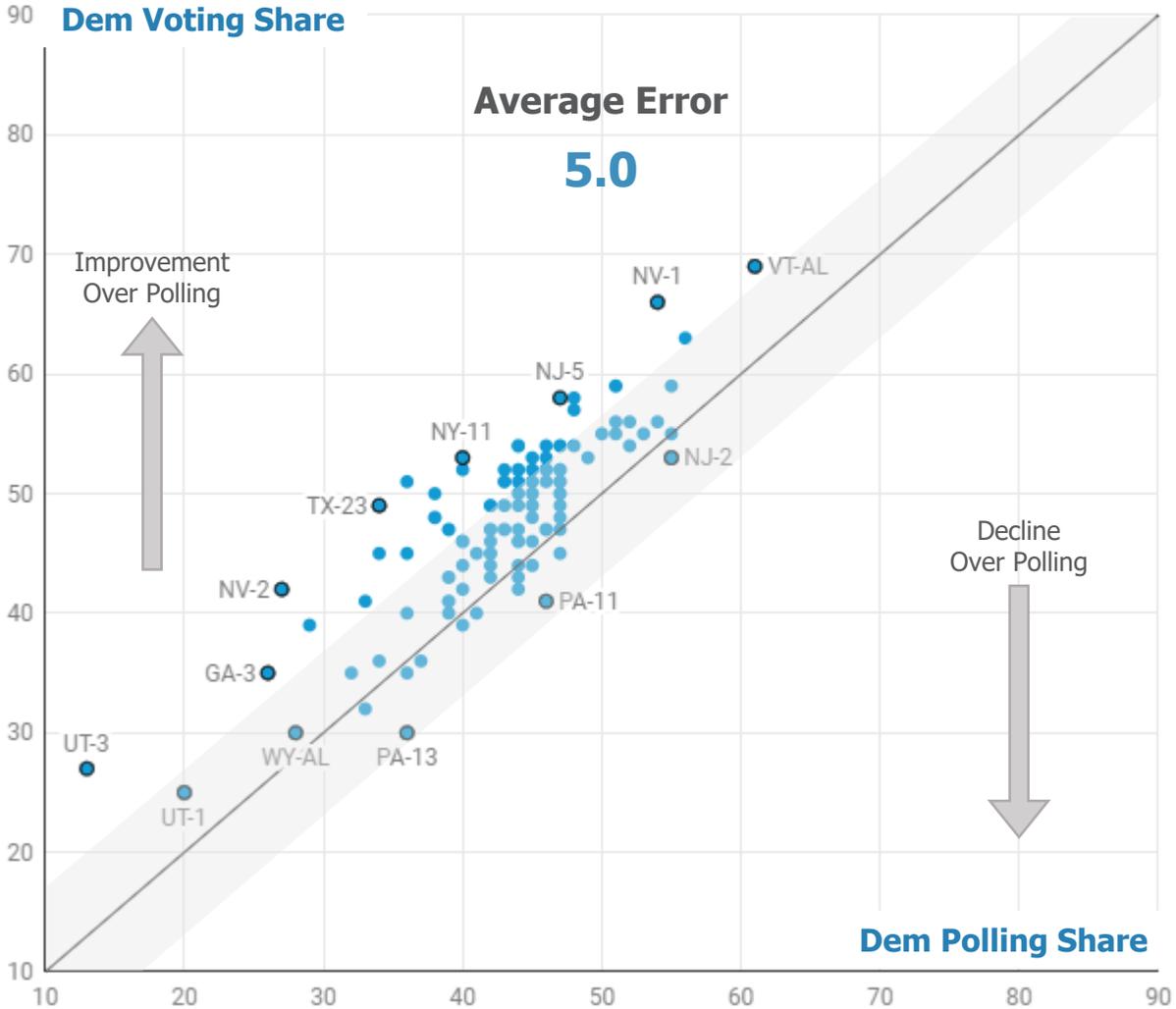


Average Error

0.2

4.3

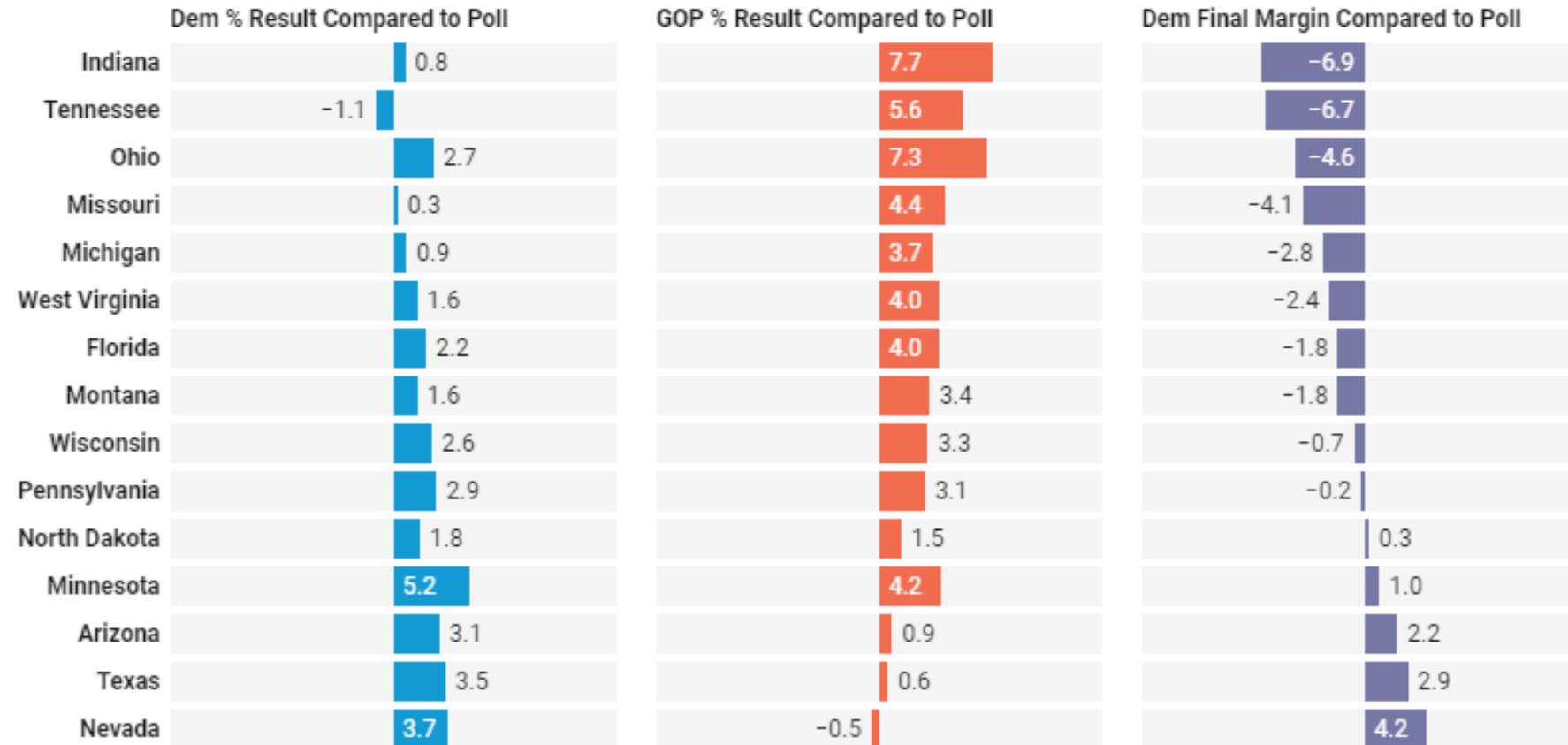
Polling about D and R broke the pattern by underestimating vote share about equally in the House races.



2018 Senate races show the same pattern as 2018 House races

2018 U.S. Senate Poll Comparison

Final Results Compared to Public Polling Average in the Last Three+ Weeks (10/13 to 11/6)



Average Error

2.1

3.5

Now that a fact pattern about the polling has been established, there is another important strategic point:

- **In the big races the Democrat candidate must be at 49 or above to win. Meaning if the Democrat candidate is winning (for example) 46 to 40 then the Democrat candidate loses the race and gets around 46 on election day.**
- **Key exceptions:**
 - **A strong 3rd Party candidate can affect the math, but Hillary was not close to 50% in the swing states, and so should have never been seen as the clear favorite.**
 - **In lower profile CD races or down ticket races usually there is a higher percentage of undecided voters – however – this is where the dislike of the Democratic brand plays a larger role and a key driver in underperforming local races.**

The 50% Rule: Biden won all states where he publicly polled at 50%+. He split the states where we was between 48-49% and lost where he polled below that.

State	Polling Average			Election Results		
	Biden	Trump	Net	Biden	Trump	Net
Colorado	54.4	41.1	13.3	55.4	41.2	14.2
New Hampshire	54.2	43.3	10.9	52.9	45.5	7.4
Minnesota	51.9	42.4	9.5	52.6	45.4	7.2
Wisconsin	51.7	44.4	7.3	49.6	49.0	0.6
Michigan	51.1	43.5	7.6	50.7	47.9	2.8
Pennsylvania	50.3	45.5	4.8	50.0	48.8	1.2
Nevada	49.7	45.6	4.1	50.0	47.7	2.3
North Carolina	48.9	47.2	1.7	48.7	50.1	-1.4
Florida	48.8	47.0	1.8	47.9	51.2	-3.3
Arizona	48.8	46.1	2.7	49.4	49.1	0.3
Georgia	48.4	47.2	1.2	49.5	49.3	0.2
Texas	47.2	48.5	-1.3	46.5	52.1	-5.6
Iowa	47.0	47.6	-0.6	45.0	53.2	-8.2
Ohio	46.6	48.7	-2.1	45.3	53.3	-8.0

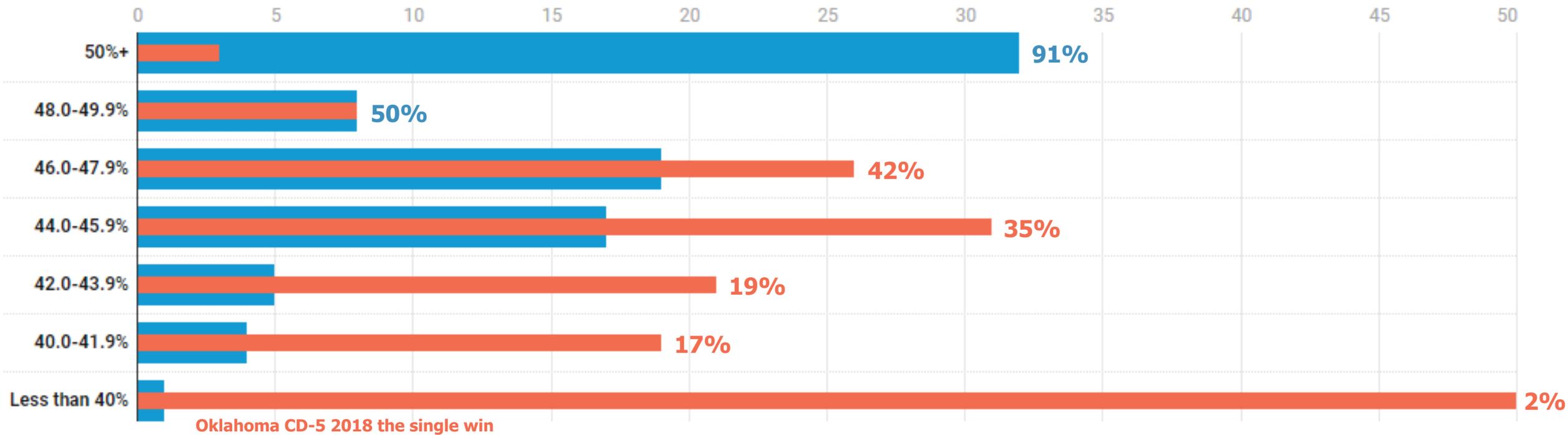
Hillary did not poll above 50% in swing states. Yes, there was a third party candidate but she was never close to 50%. Undecideds and Independents once again held the cards and broke against her.

State	Poll Average			Election Results		
	Dem	GOP	Net	Dem	GOP	Net
Wisconsin	46.9	40.6	6.3	46.5	47.2	-0.7
Pennsylvania	46.9	42.2	4.7	47.9	48.6	-0.7
Virginia	46.8	40.3	6.5	49.8	44.4	5.4
Florida	46.5	44.4	2.1	47.8	49.0	-1.2
North Carolina	46.1	44.5	1.6	46.2	49.8	-3.6
Michigan	45.6	38.1	7.5	47.3	47.5	-0.2
New Hampshire	45.3	40.7	4.6	46.8	46.5	0.3
Nevada	45.2	44.1	1.1	47.9	45.5	2.4
Georgia	44.4	46.5	-2.1	45.9	51.0	-5.1
Colorado	44.1	39.7	4.4	48.7	43.7	5.0
Ohio	43.7	46.1	-2.4	43.6	51.7	-8.1
Arizona	42.6	44.2	-1.6	45.1	48.7	-3.6
Iowa	41.5	45.5	-4.0	41.7	51.1	-9.4
Texas	41.1	46.6	-5.5	43.2	52.2	-9.0

The 50% public polling rule holds true in House races as well.

US House
Dem Polling %

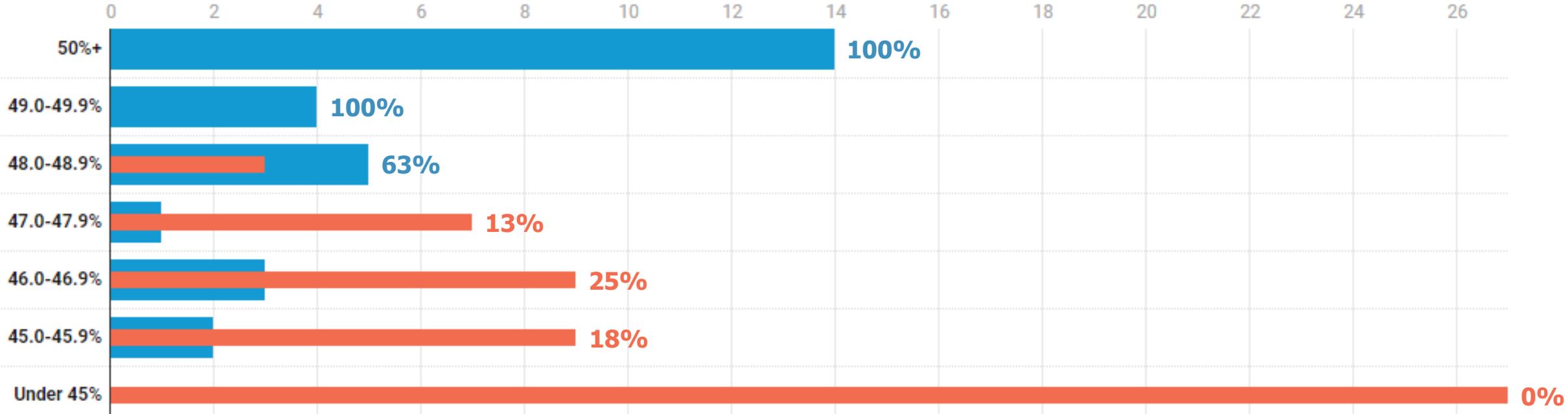
Dem House Winning %



Senate races follow the 50% rule even more than House races

US Senate
Dem Polling %

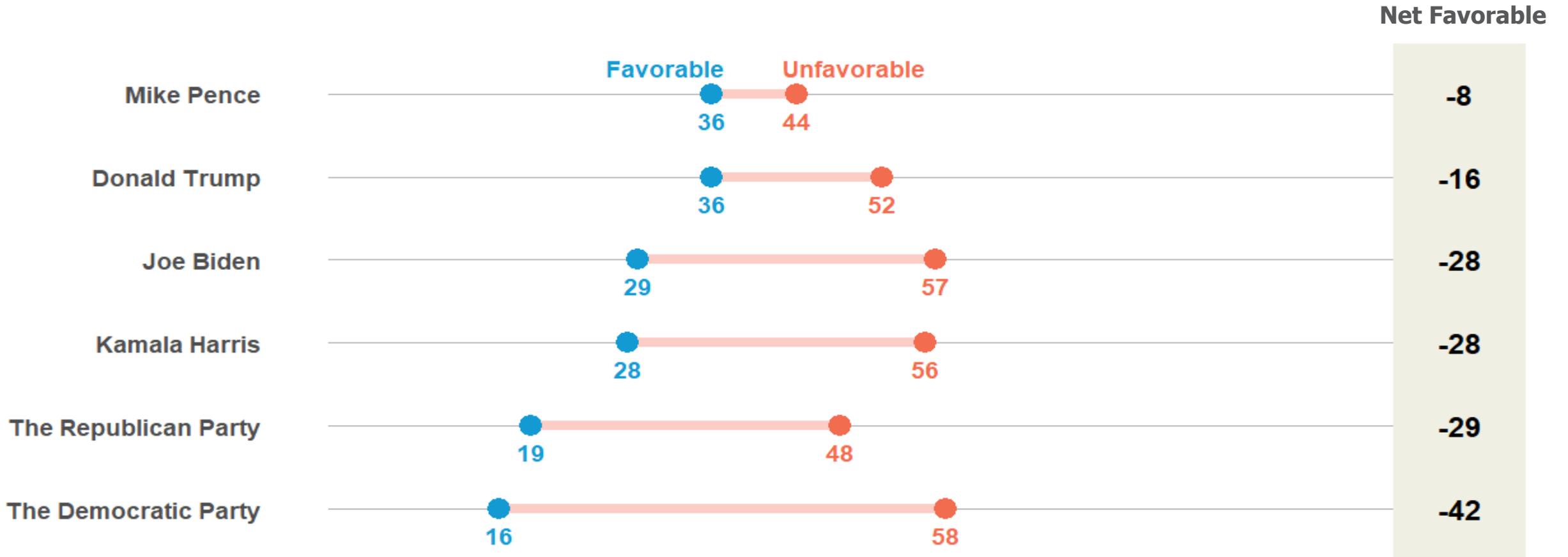
Dem Senate Winning %



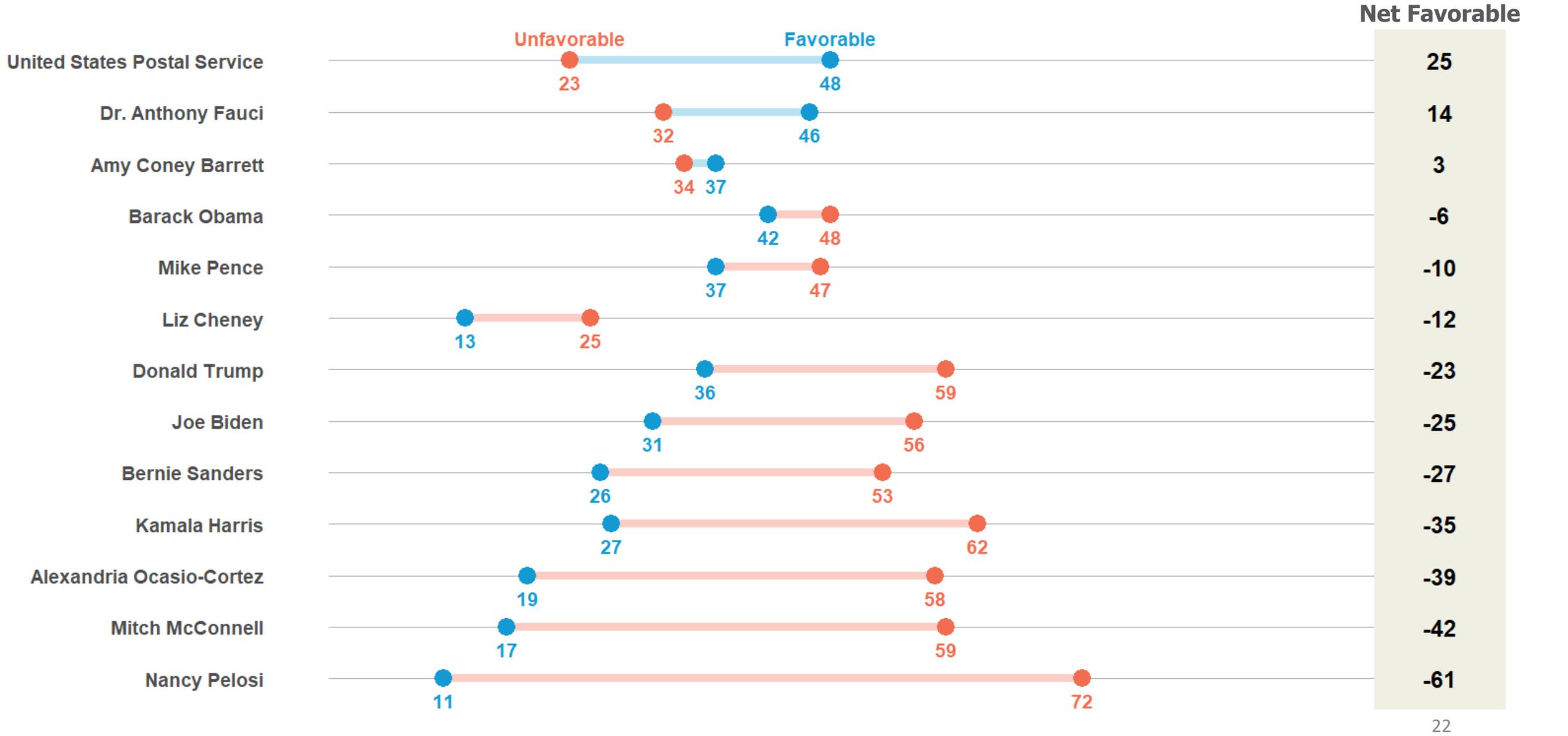
To build a durable and national Democratic majority, we must answer these four questions:

- **With the data being consistent over several cycles that Democrats get what they get in polls, why are the undecided/third party voters more comfortable voting Republican than Democratic?**
- **What is wrong with the Democratic brand? How have Democrats failed to define the Party, and how have they allowed the Republicans to brand the Party?**
- **Why did Biden do so much better than down ticket Democrats? A close study of his messaging vs. other candidates is a must.**
- **What do we need to do to persuade people who do not have Democratic voting in their DNA to vote for us?**

Pure Independents, a small (7-10%) share of the electorate, tend to determine margins and outcomes. While they dislike everyone, the polling shows they dislike Democrats more.

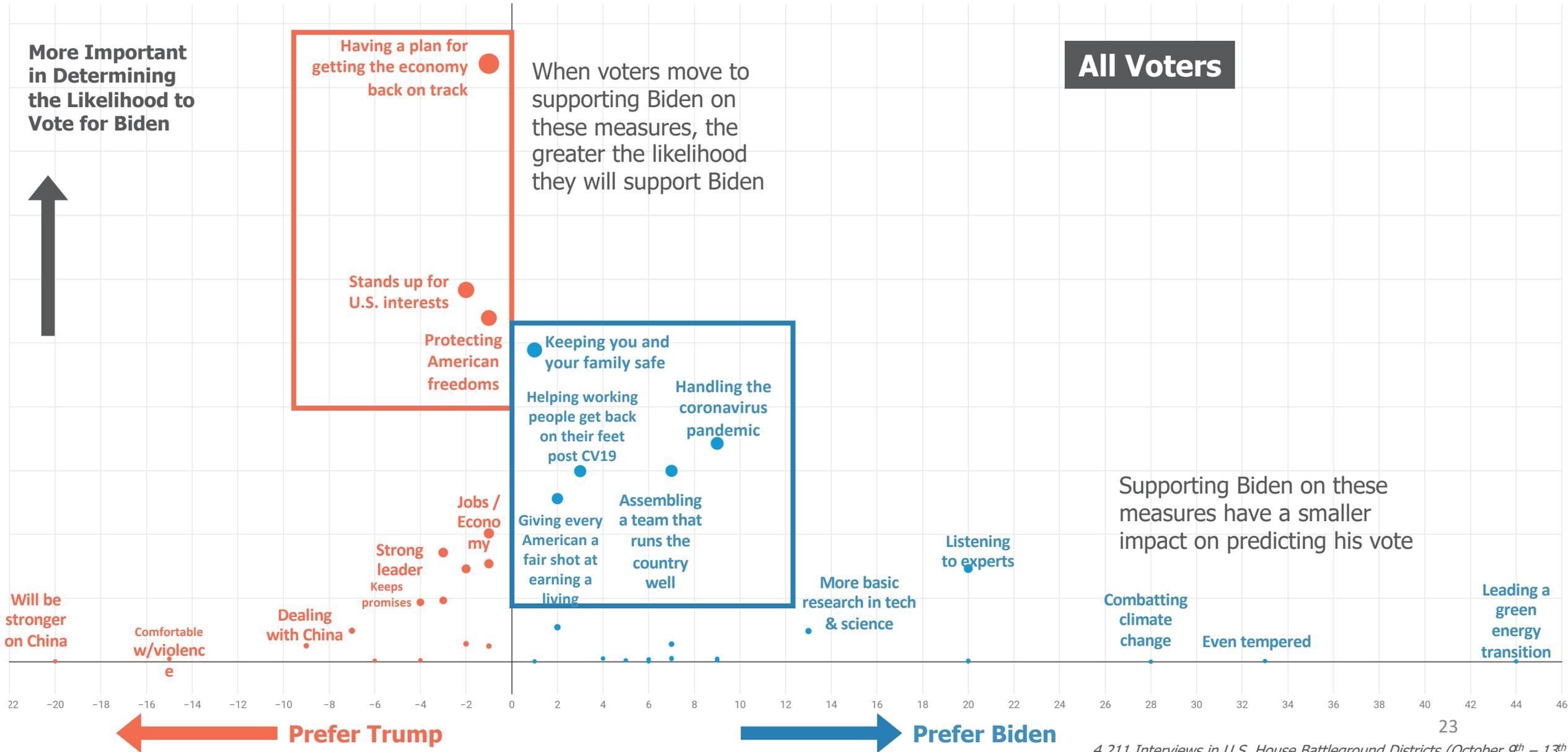


More data points: Independents on public figures and institutions



22
4,211 Interviews in U.S. House Battleground Districts (October 9th – 13th)

Donald Trump had an advantage on three issues/traits most significant in predicting vote choice

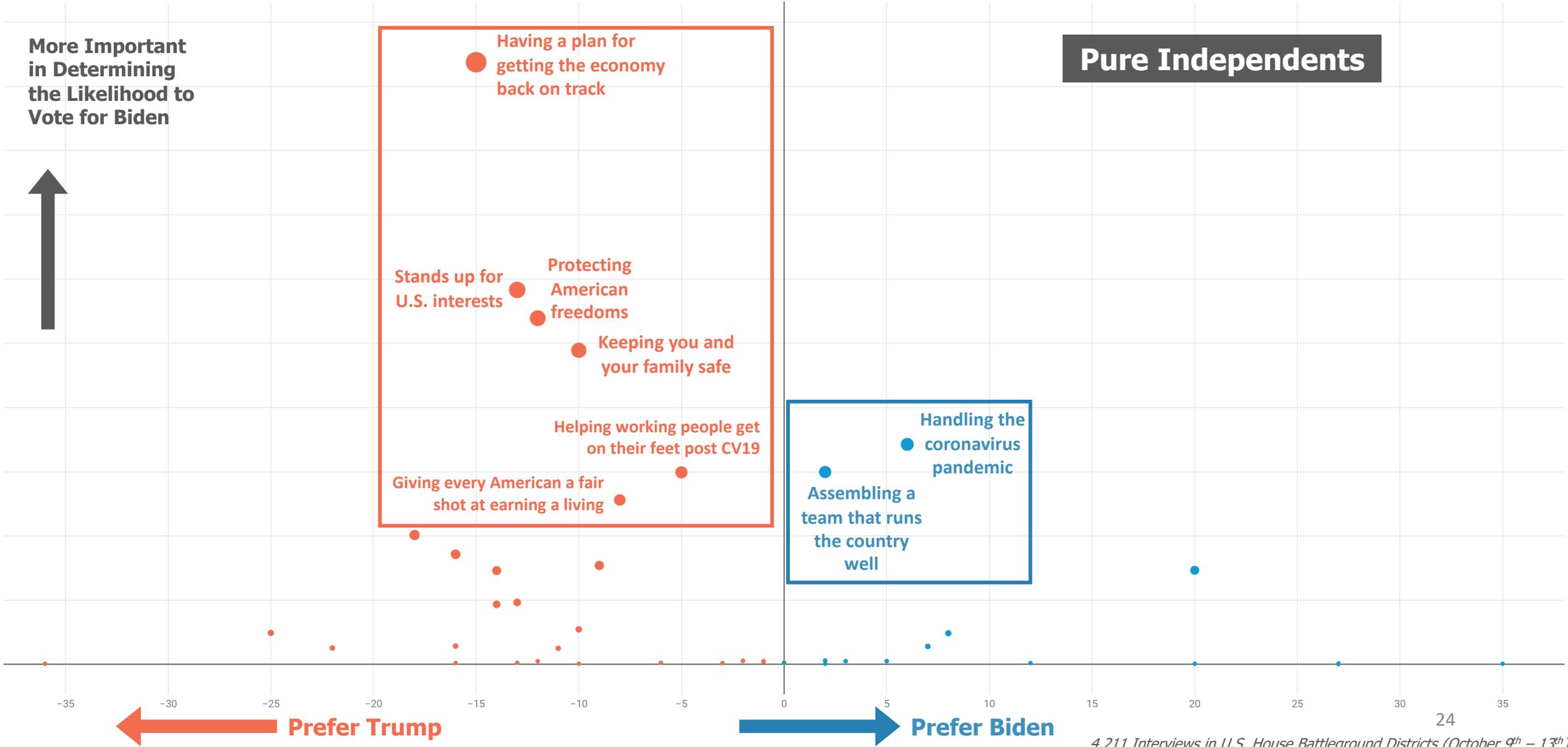


Trump does better on these than he does overall with pure Independents.

More Important in Determining the Likelihood to Vote for Biden



Pure Independents



Prefer Trump

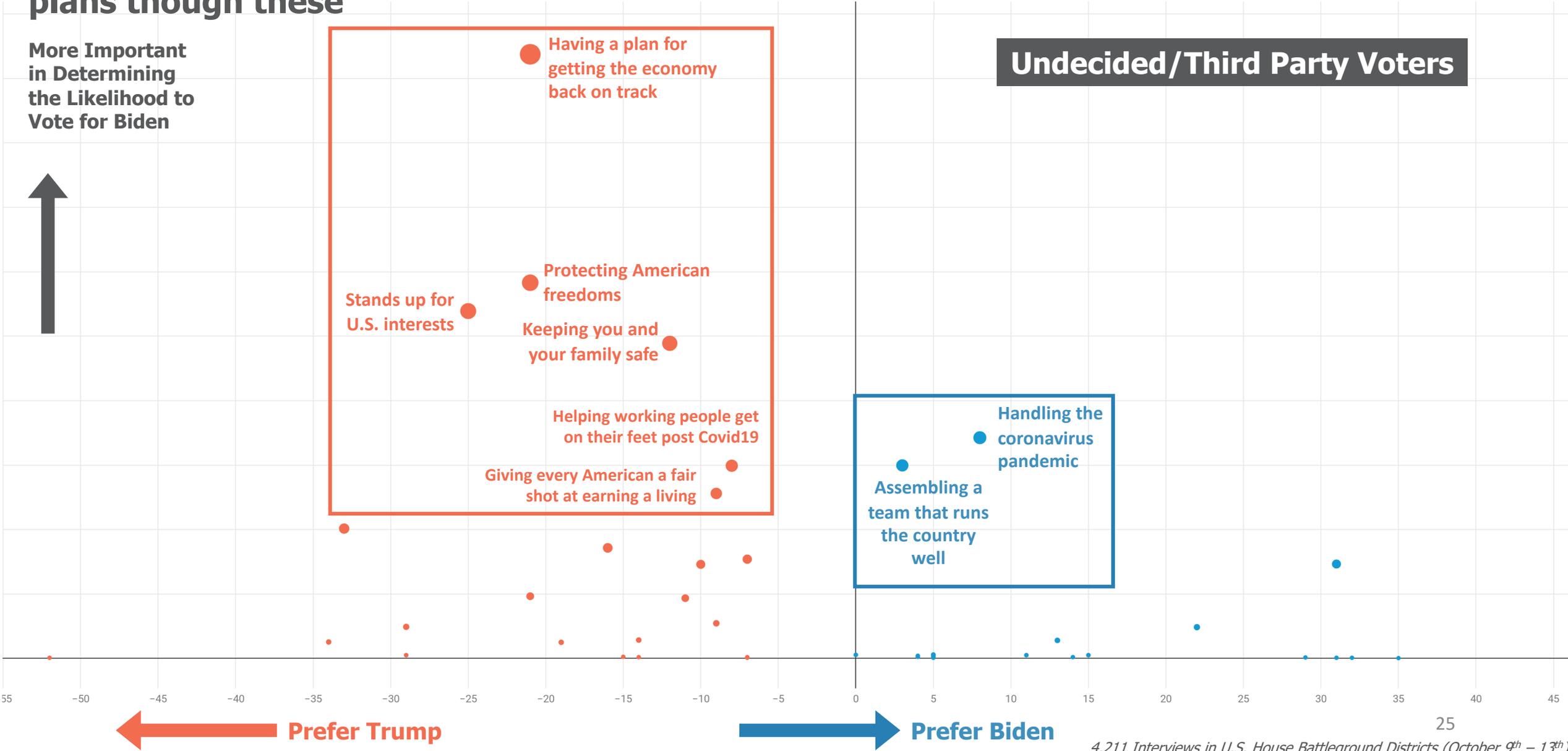
Prefer Biden

To do better with the uncommitted voters. Biden and those supporting him must center our story on these attributes and filter all accomplishments and plans though these

More Important in Determining the Likelihood to Vote for Biden



Undecided/Third Party Voters



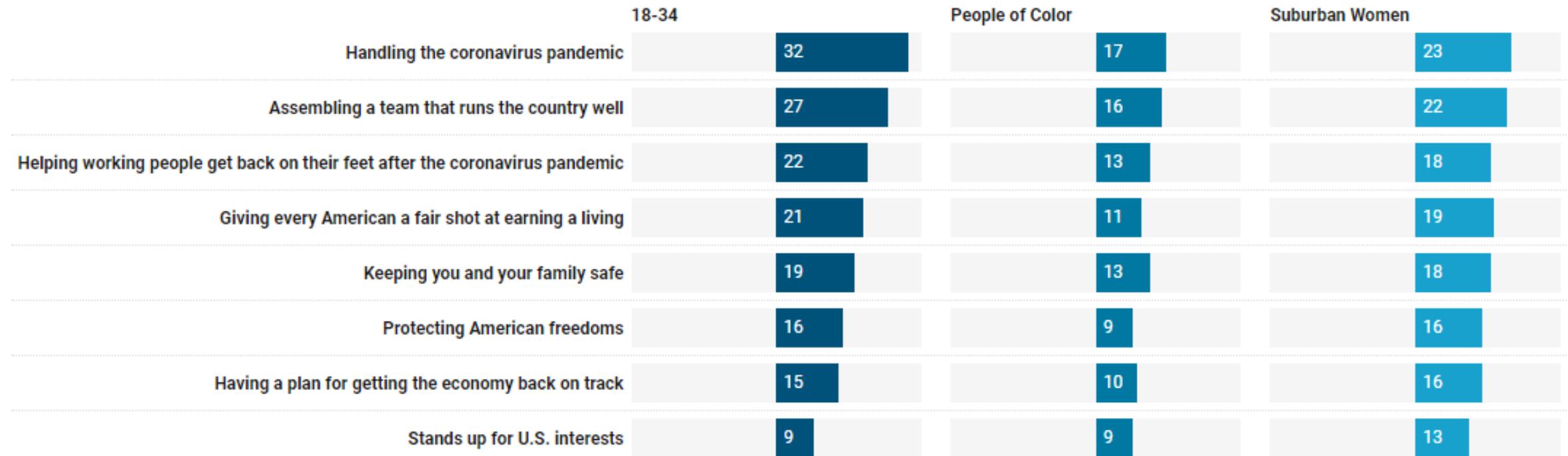
← Prefer Trump

→ Prefer Biden

Biden and the Democrats Have Unique Advantages on These Key Issues / Traits over Trump and the Republicans with Young Voters, People of Color, and Suburban Women

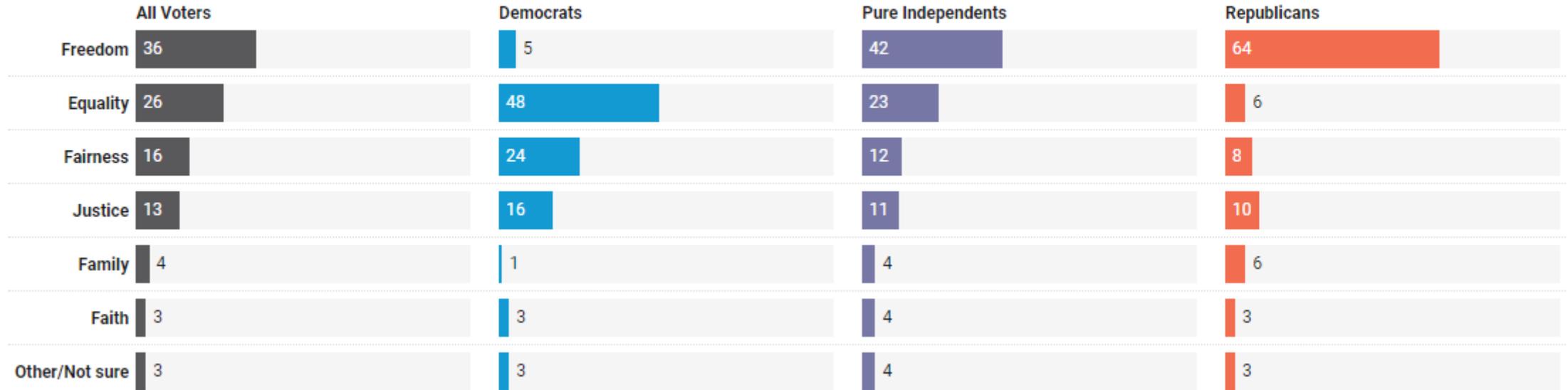
Who Would Do Better on Issues/Traits

Net Biden

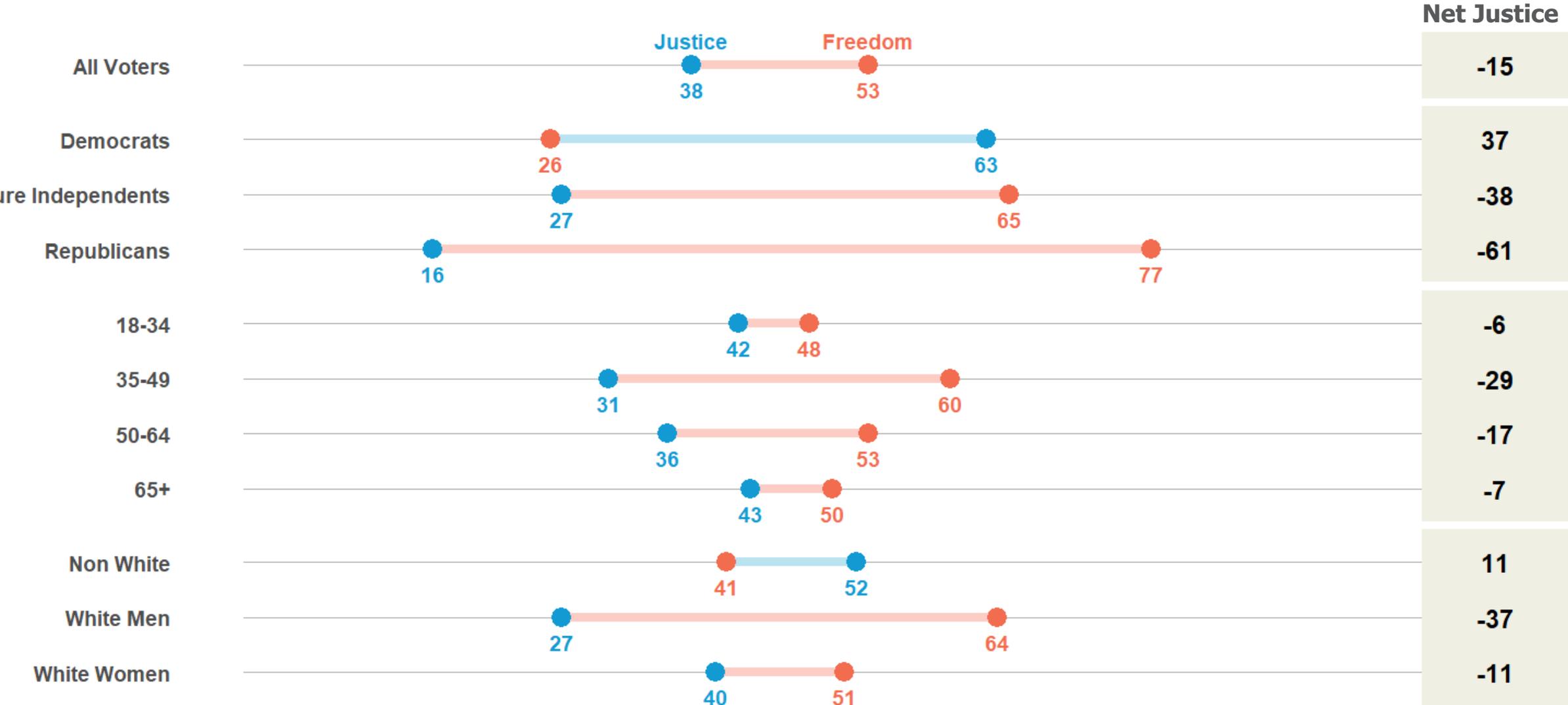


Independent voters, who tend to decide most elections, value most the word 'freedom'; which aligns with the Republican value words. While Democrats are split on their value words. And won't embrace freedom, even economic freedom.

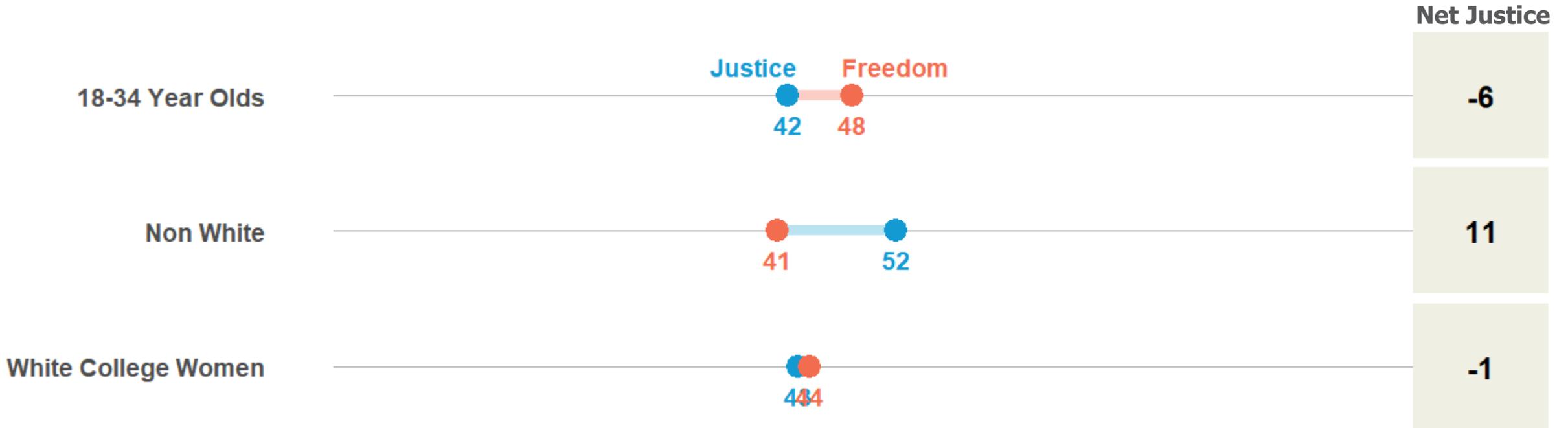
If a political party could choose one and only one value to place highest in their governing and in their message, what would that value be?



Many vocal Democrats have defined themselves as “Justice Democrats” and the GOP communication machine was all too happy to stick that label to all Democrats. This chart might explain the down ticket issues. Justice just isn’t the most important American value.



Our core constituencies are closely divided on this and we must develop a message and program that speaks to both of these values.

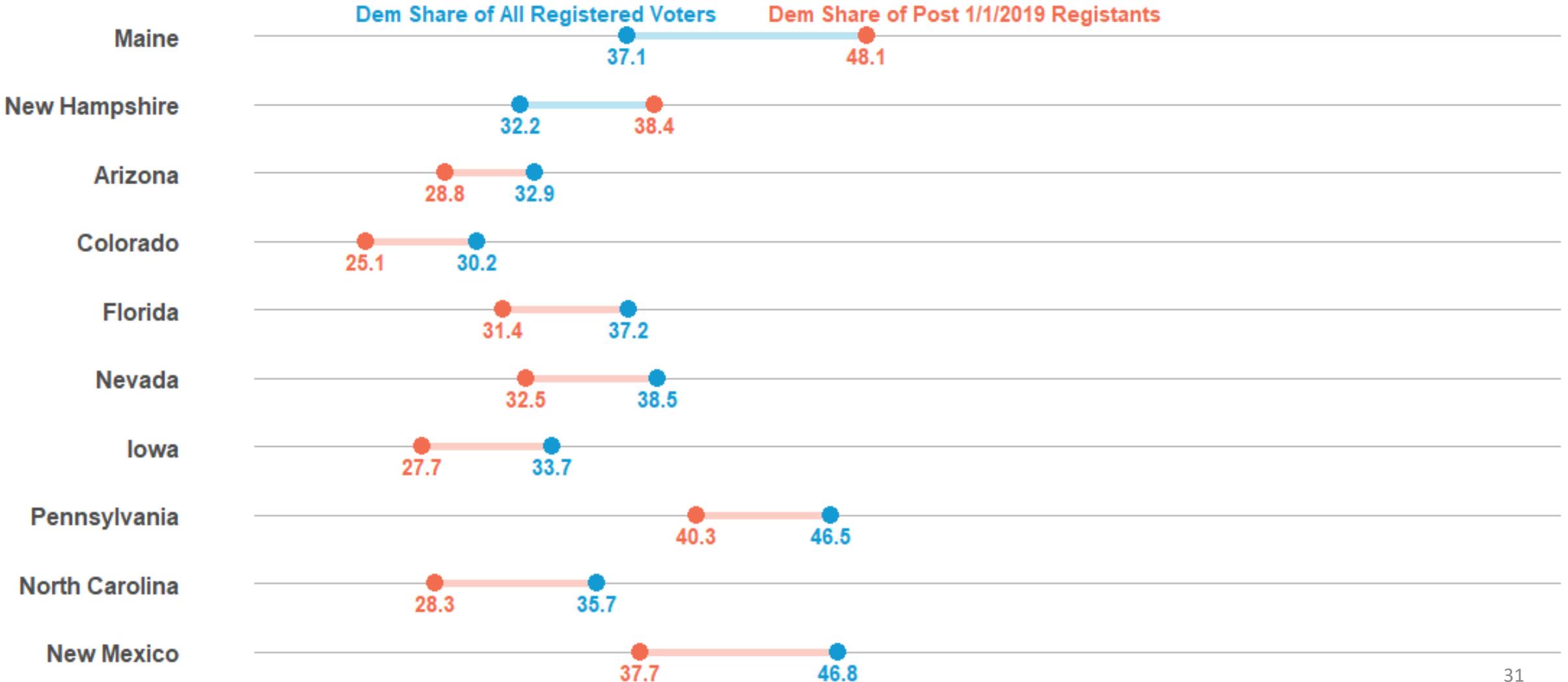


Recommendations:

- **Adjust polling budgets away from messaging to base voters and do many more interviews with people – mostly independent voters - who dislike both parties to drive the strongest contrasts with the GOP. Trust independent groups to turn out voters.**
- **Focus on economic issues that voters care about and their values that drive their choice. Focus on the working class (Biden’s personal story, allowed independents to identify with him.)**
- **Frame the Democratic in terms of a vision of “freedom” (such as “more access to health care gives you the freedom to start a business.”) We know that freedom dominates the Republican mind, however, it is also a major driver of the Independent vote.**

One more recommendation:

- Register more voters. Democrats are losing ground in swing states. Some entity should certify and resource best in class organizations early each cycle.



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December 2020