

# 2024 state of play



The *Presidential* Election and the Race for *Congress*

## 2024 state of play

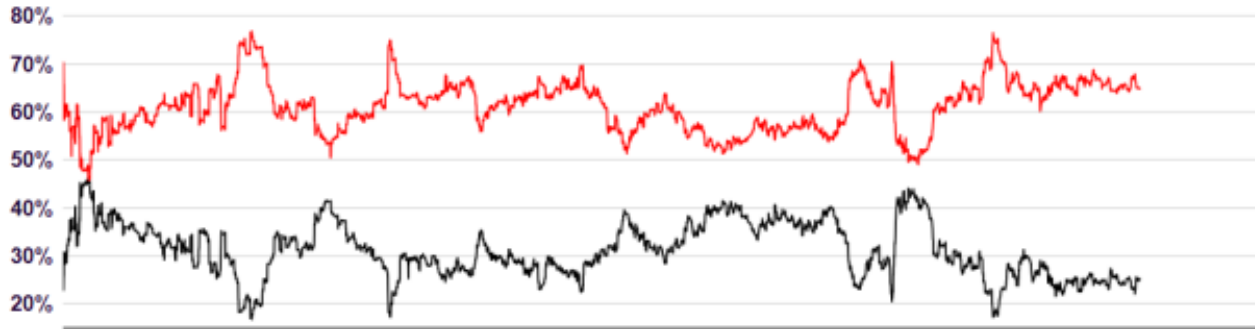


Expected to be the most expensive in history –  
**\$16.7 BILLION** projected to be spent between  
presidential, Senate and House races combined.

# People are in a bad mood



## Direction of Country



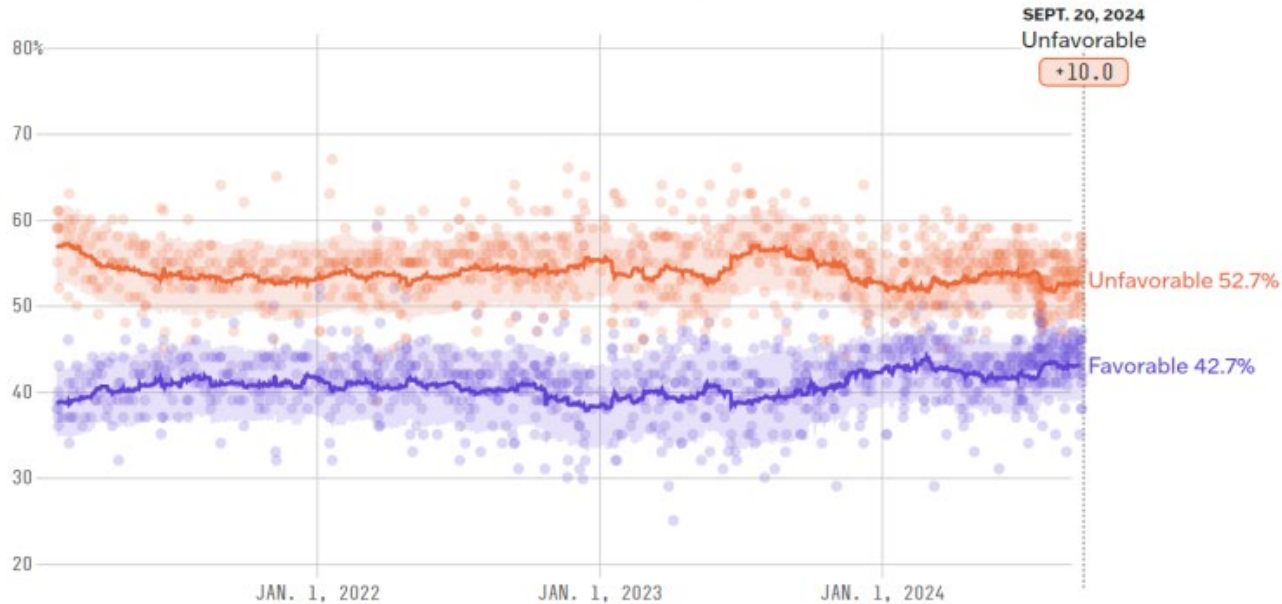
SOURCE: RealClearPolitics

15 YEARS

of consecutive  
months saying  
country is off on  
the wrong track

# Largely a referendum on Trump... to an extent

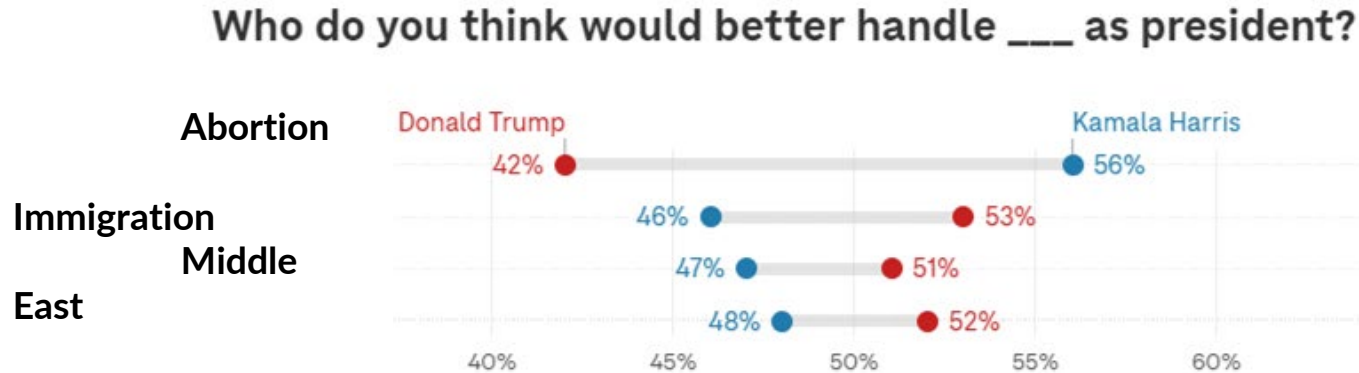
Do Americans have a favorable or unfavorable opinion of Donald Trump?



SOURCE: FiveThirtyEight

- Trump's favorability ratings have not budged.
- People love him or hate him

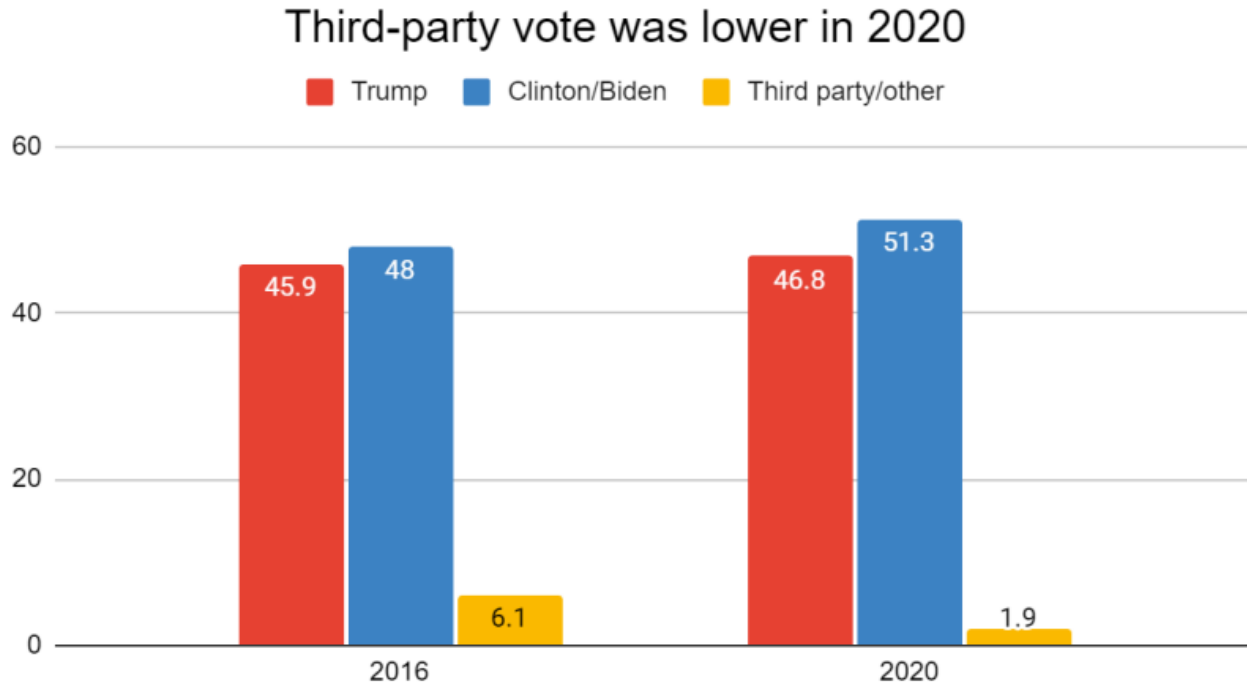
# But... the issues are a fundamental GOP advantage



Source: NPR/PBS News/Marist poll of 1,529 U.S. adults, conducted Sept. 3-5, 2024. The margin of error for the overall sample is 3.2 percentage points. "Neither" and "unsure" results aren't shown.

Credit: Shajia Abidi and Alyson Hurt/NPR

# The third-party wild card



SOURCE: U.S. Election Atlas

Trump got 46% in 2016 and won.

He got 47% in 2020 and lost.

*The difference?*

# 2024 state of play



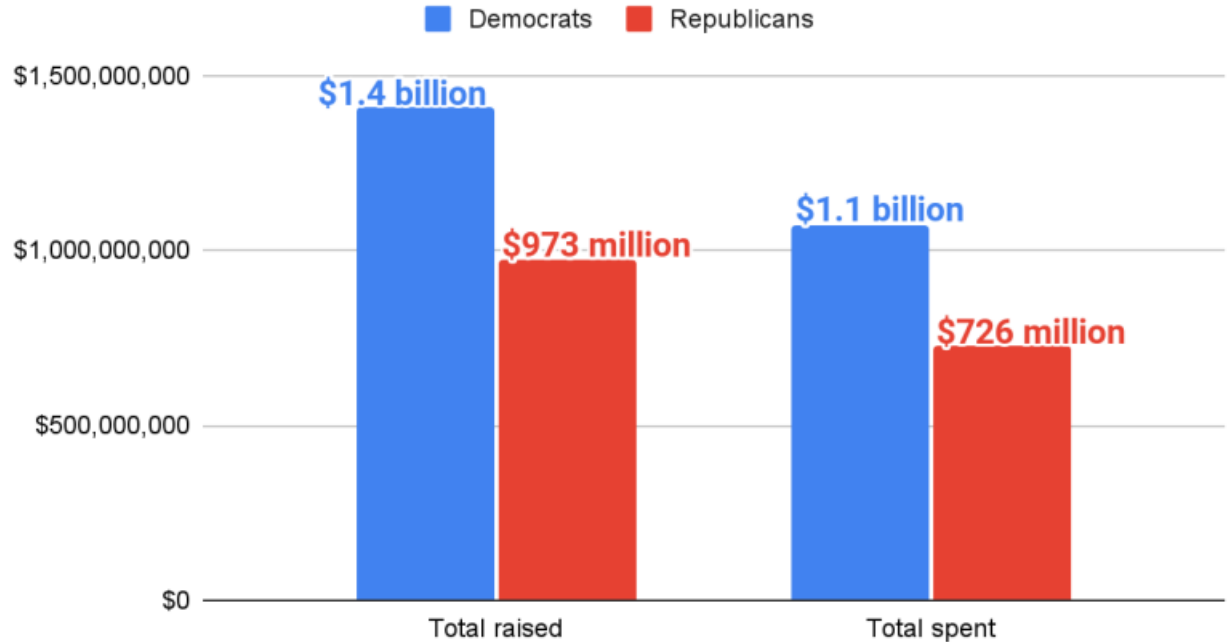
## A Closer Look at the Money

# Money



Democrats raised more than *\$1 billion* – as of the *end of August*

Total raised and spent by party in presidential election so far

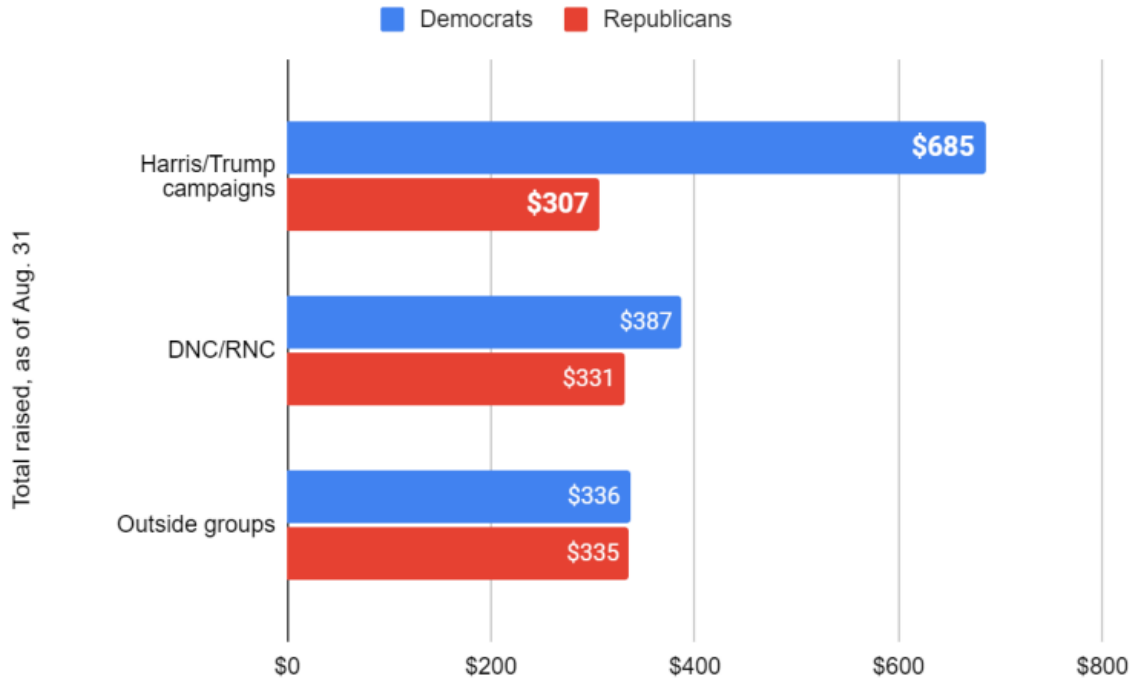




# Money



Harris' campaign has outpaced Trump by a lot (amt in millions)



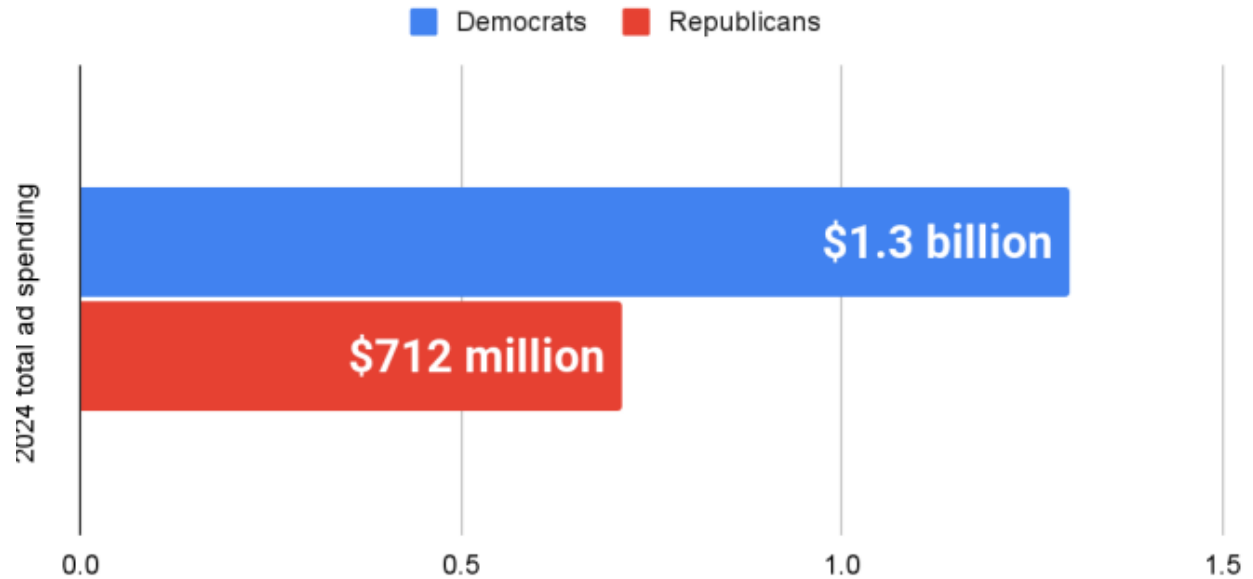
Harris has  
outraised Trump  
since she got  
into the race.

# Ad spending



More than  
\$2 billion spent  
so far

## Democrats have outspent Republicans on ads

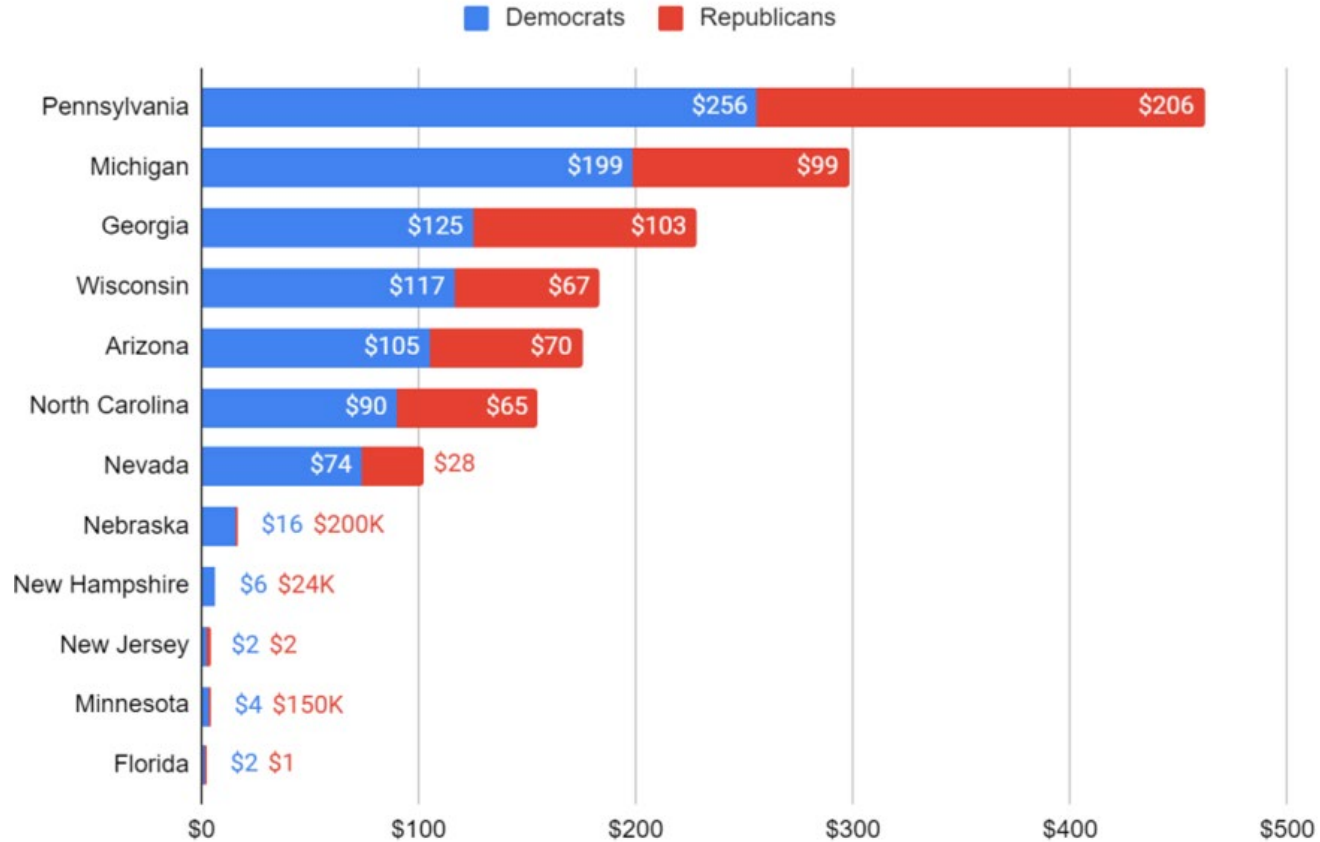


SOURCE: NPR/AdImpact, bookings from March 6-Nov. 5, 2024, as of Sept. 30

# Ad spending



Pennsylvania  
has been THE  
focus of both  
campaigns.



SOURCE: NPR/AdImpact, bookings from March 6-Nov. 5, 2024; spending in the millions

# 2024 state of play



## The Electoral Map

Harris: 226

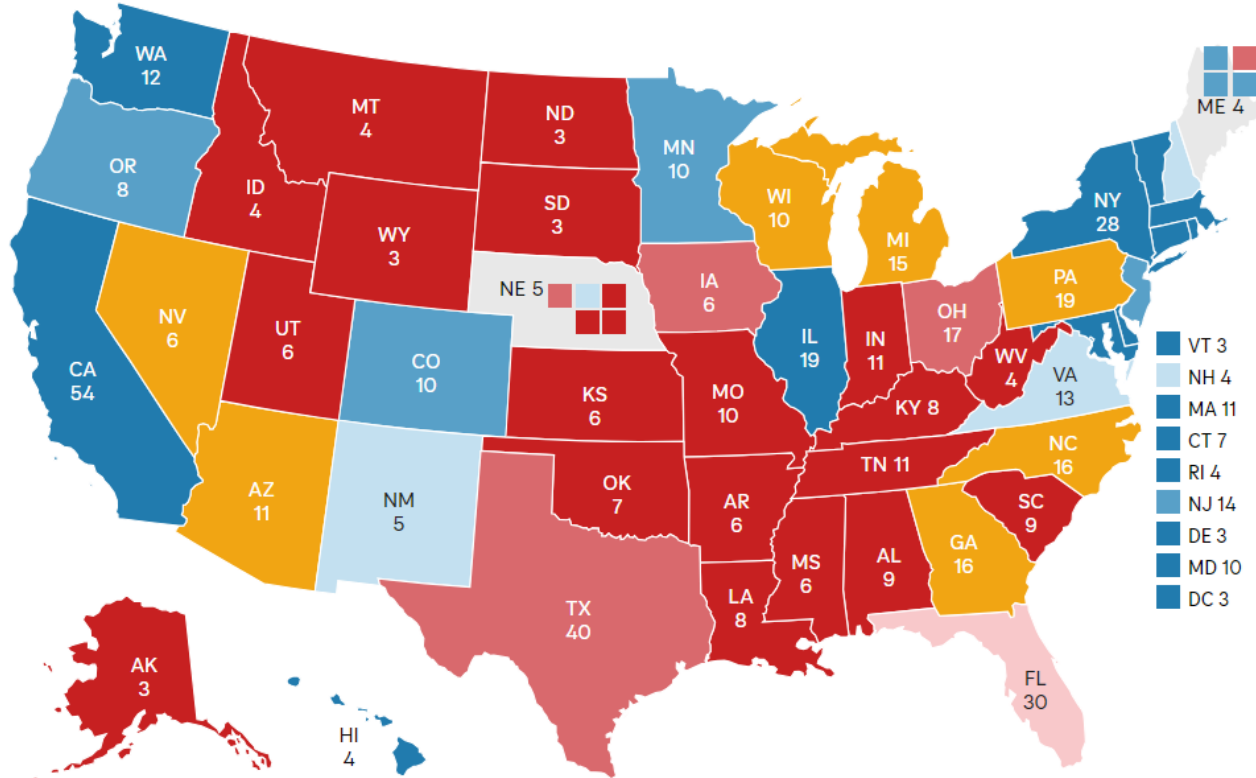
270 to win

Trump: 219



■ Safe Dem. 
 ■ Likely Dem. 
 ■ Lean Dem. 
 ■ Toss-up 
 ■ Lean GOP 
 ■ Likely GOP 
 ■ Safe GOP

ELECTORAL WEIGHT
GEOGRAPHY



## 7 closely watched states

- Blue Wall
- Sun Belt

# The polling averages – National



Harris

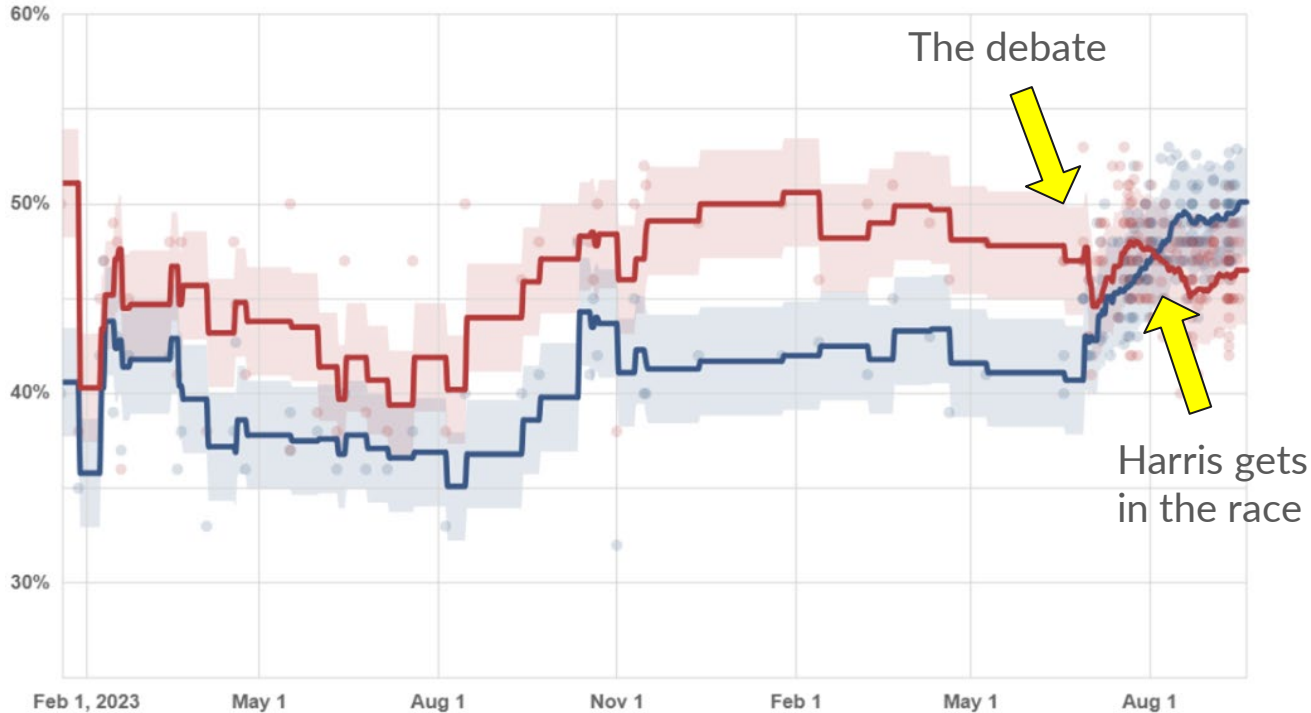
50.1%



Trump

46.5%

Estimate  95% of polls fall in this range



# Wisconsin

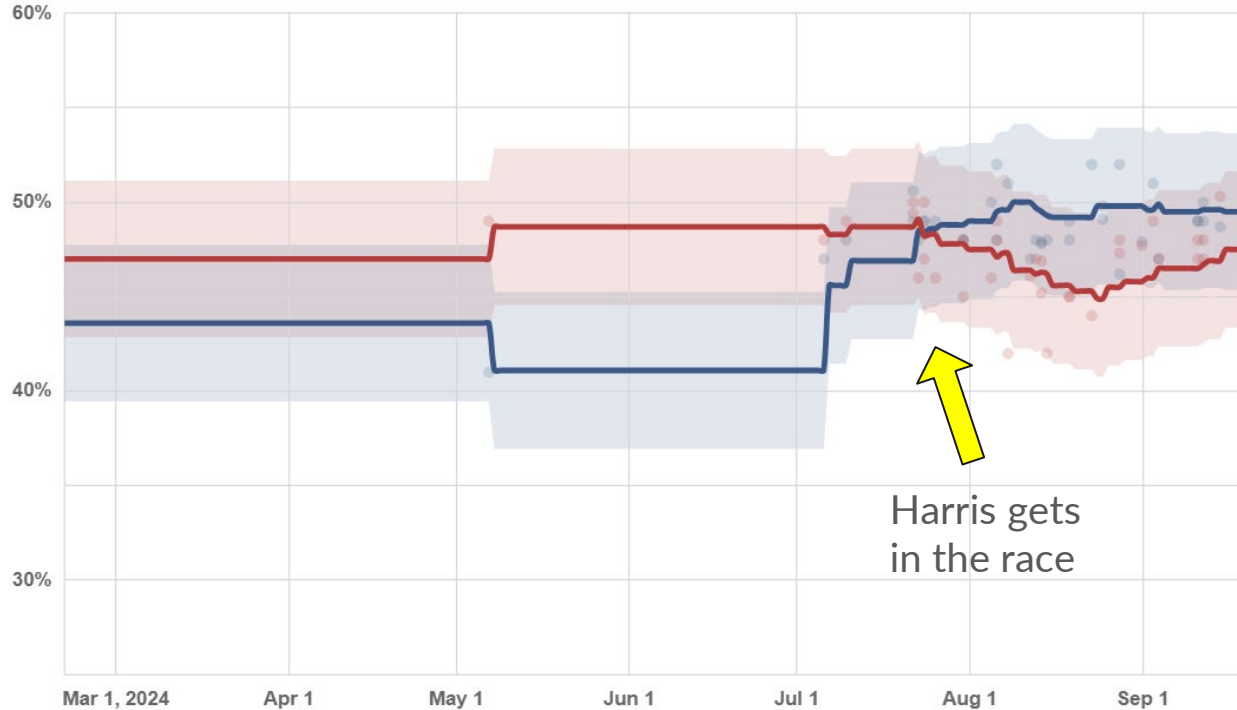


Harris 49.5%



Trump 47.5%

Estimate — 95% of polls fall in this range



# Michigan

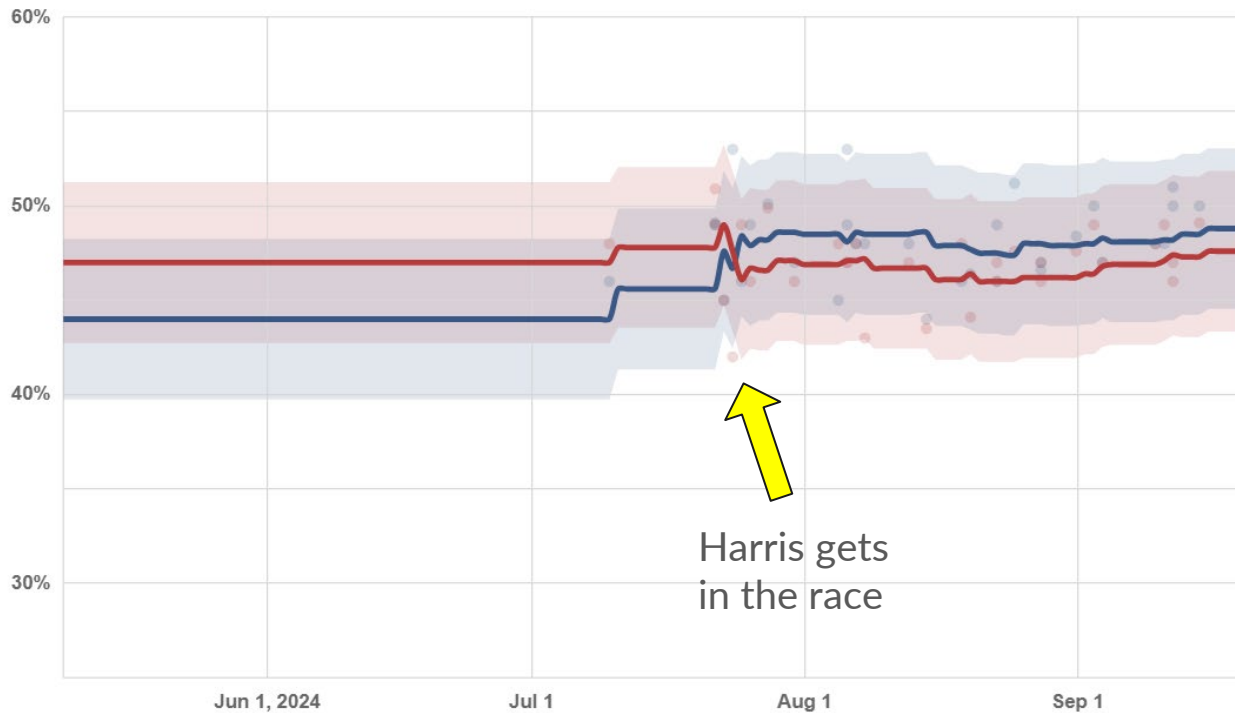


Harris **48.8%**



Trump **47.6%**

Estimate — 95% of polls fall in this range





# Pennsylvania

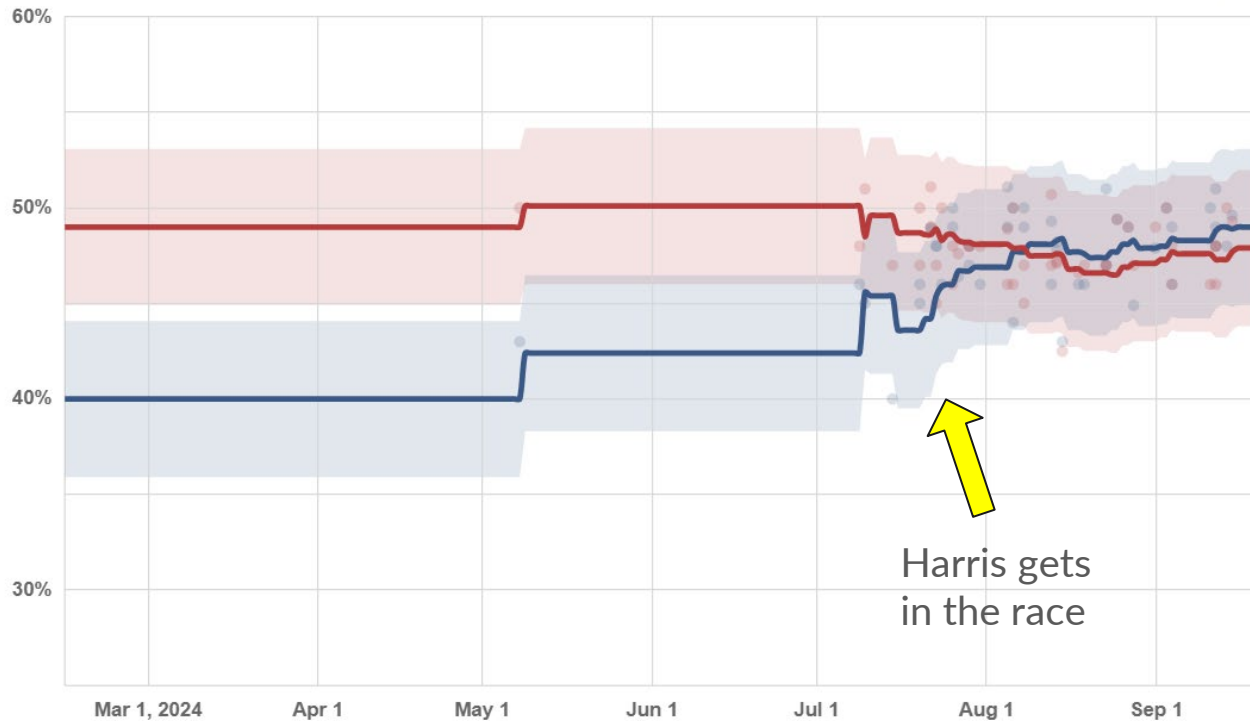


Harris **49.0%**



Trump **47.9%**

Estimate — 95% of polls fall in this range



# Arizona

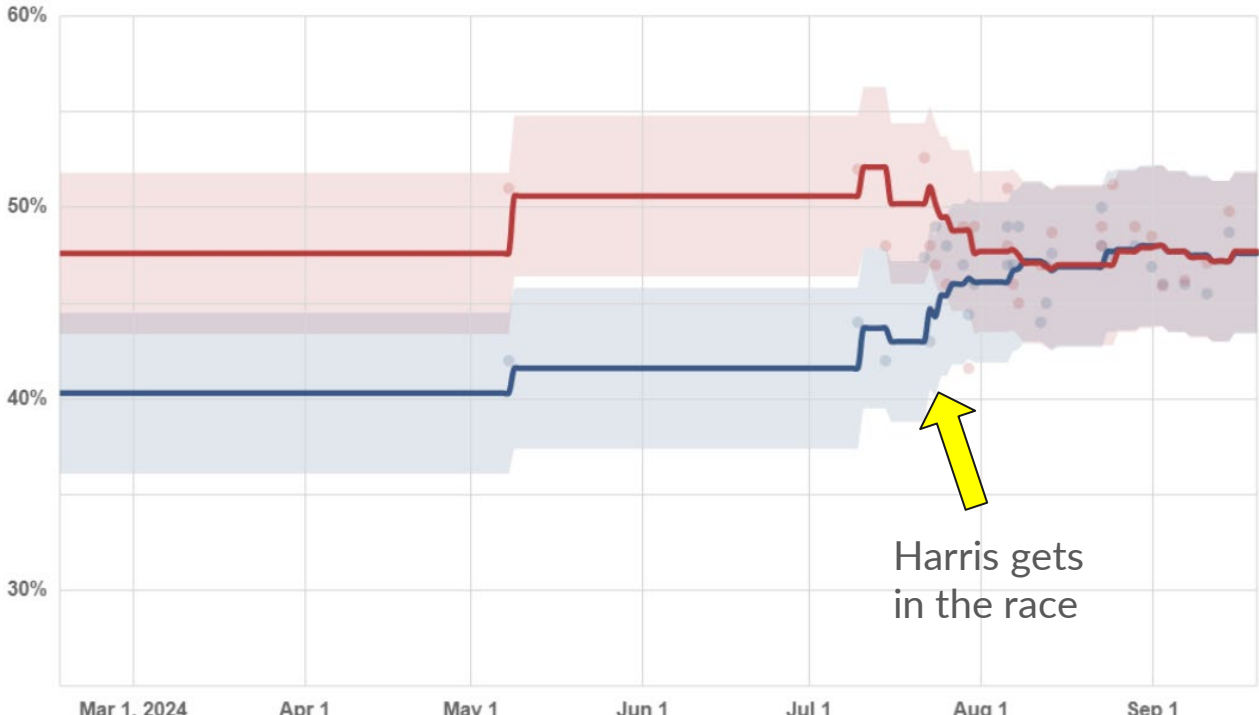


Trump 47.7%



Harris 47.6%

Estimate — 95% of polls fall in this range



# Nevada

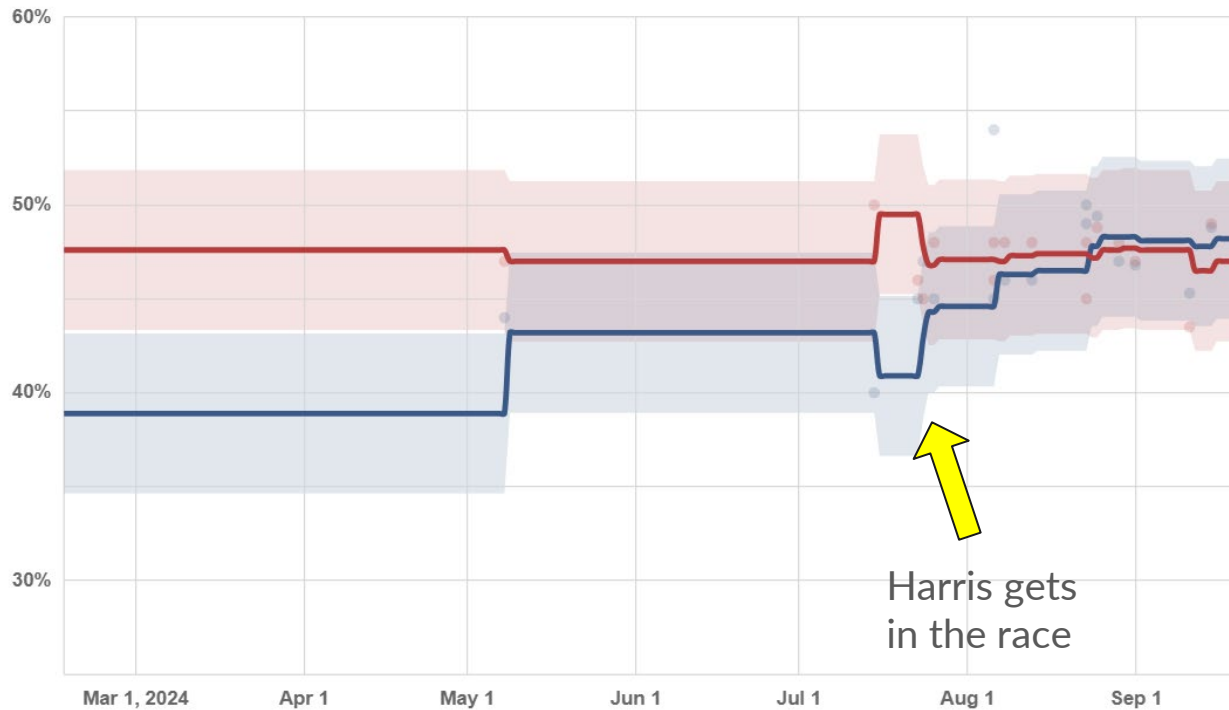


Harris 48.2%



Trump 47.0%

Estimate  95% of polls fall in this range



# Georgia

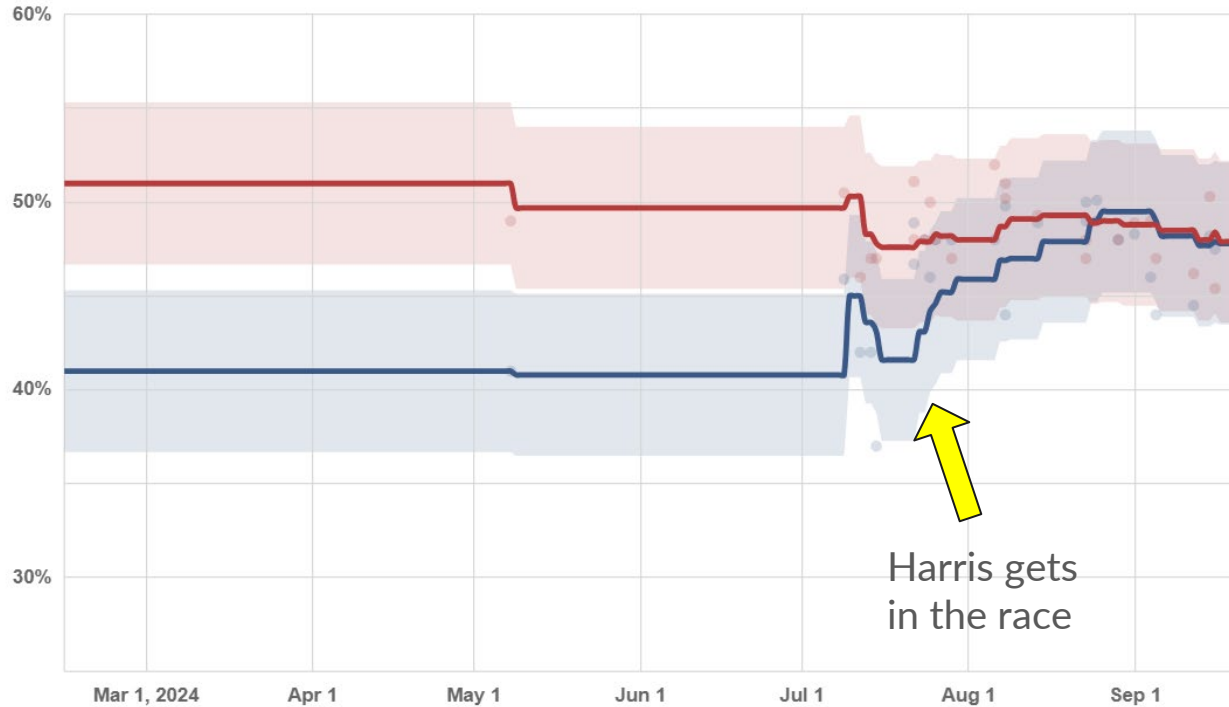


Trump 47.9%



Harris 47.8%

Estimate  95% of polls fall in this range



Harris gets in the race

# North Carolina

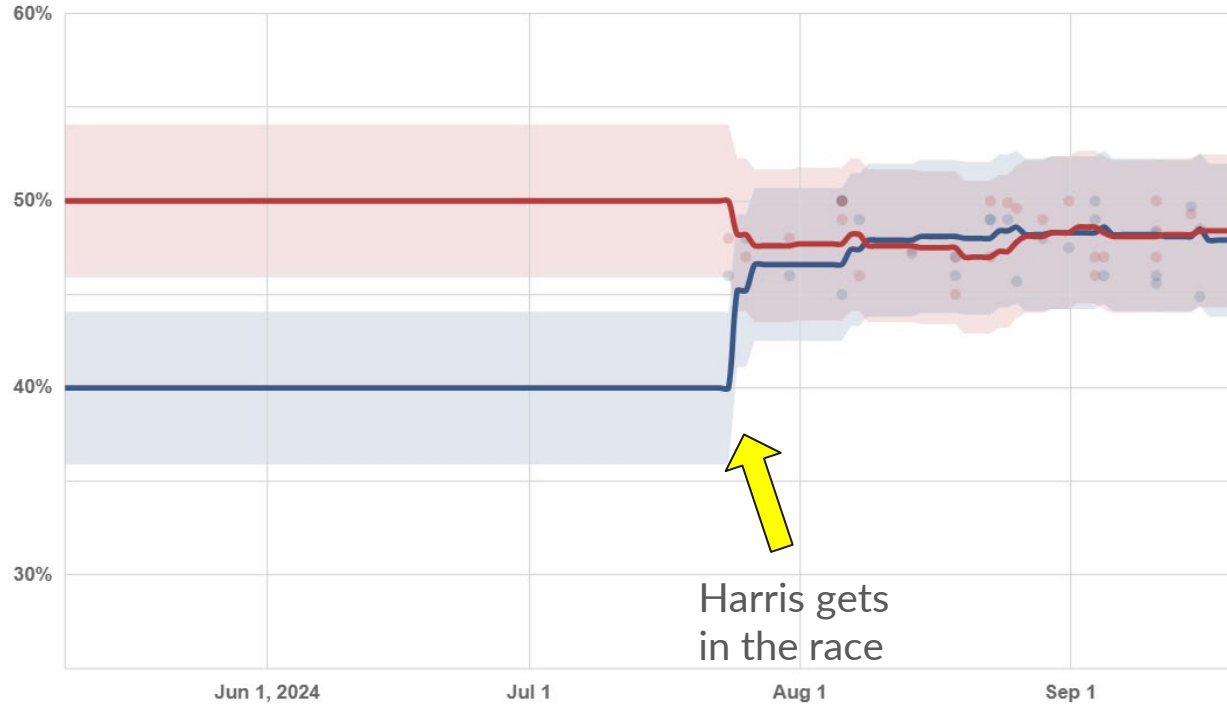


Trump 48.4%

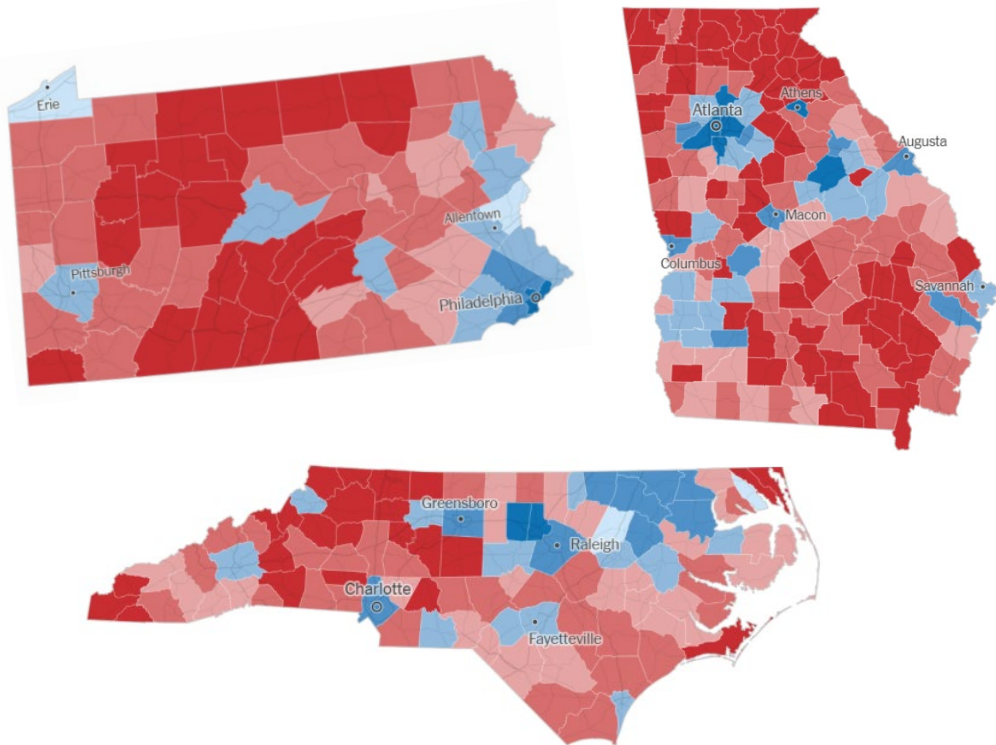


Harris 47.9%

Estimate — 95% of polls fall in this range



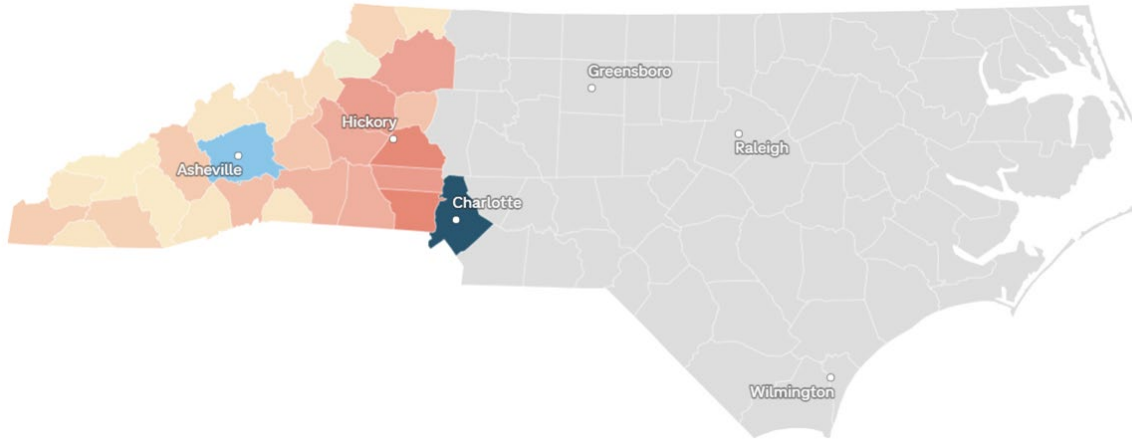
# The three most important states



There is no path for Harris without winning one of PA, GA or NC.

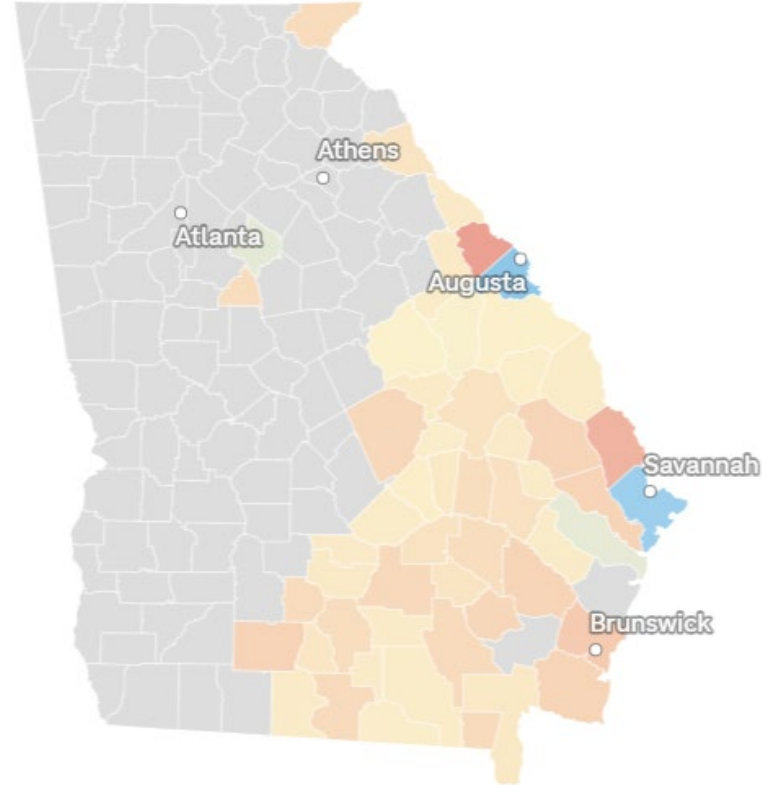
If Trump wins all three, he's right at 270.

# Potential effect of Hurricane Helene



**NC:** 52% Trump-won counties

**GA:** 57% Trump-won counties



# 2024 state of play



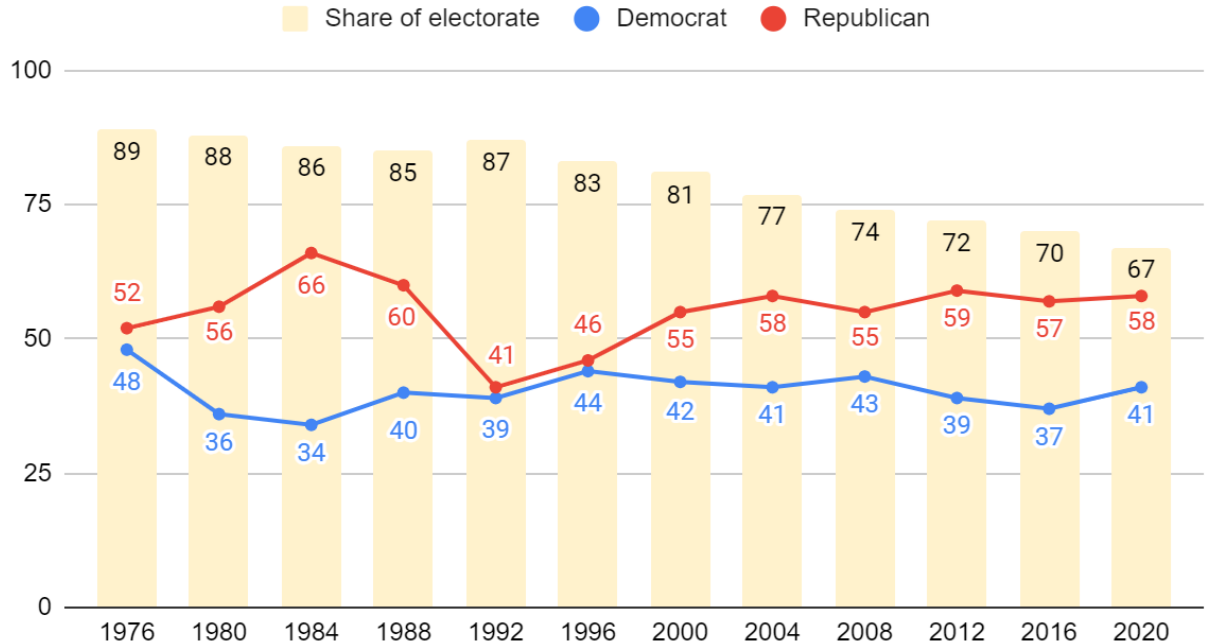
Key demographics



# White voters are largest, but declining share of electorate



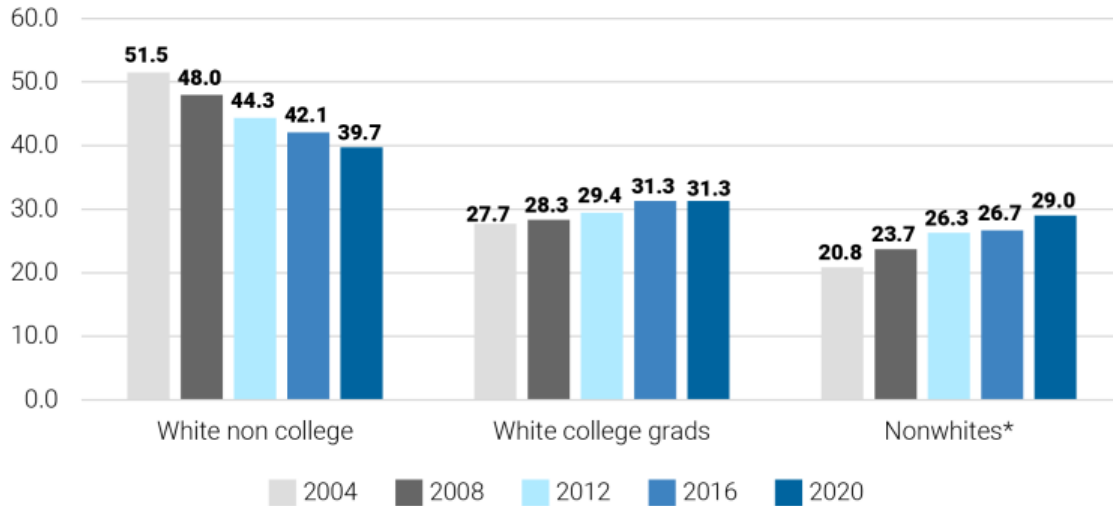
Republicans have won white voters, but they're on the decline



Democrats generally need to be at about 40% with white voters to win.

# A shifting electorate

**Figure 4. White non college, white college grad and nonwhite voter shares**  
Presidential elections, 2004-2020



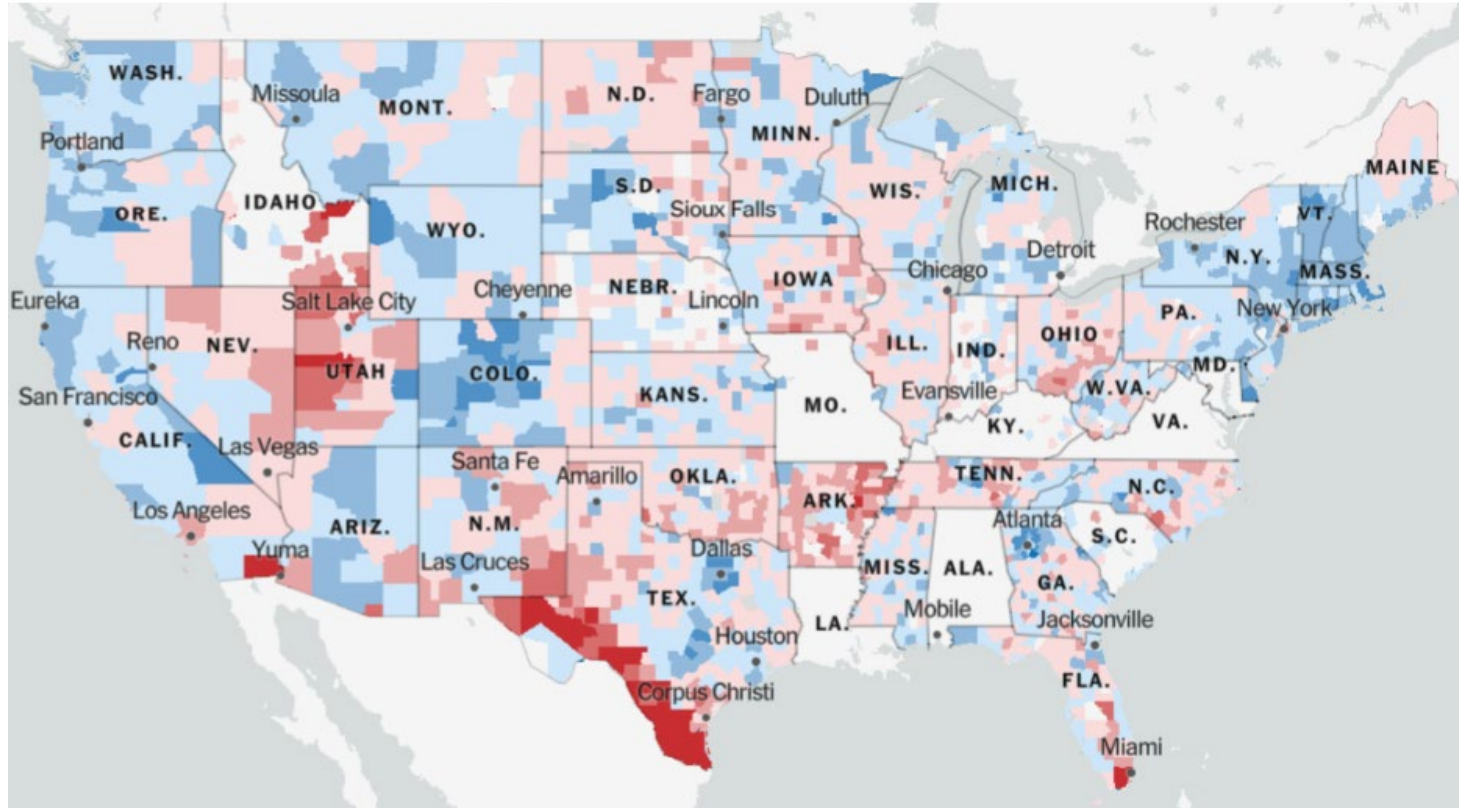
Country and  
electorate becoming  
more educated  
and  
more diverse.

\* Includes Latino or Hispanic members of racial group

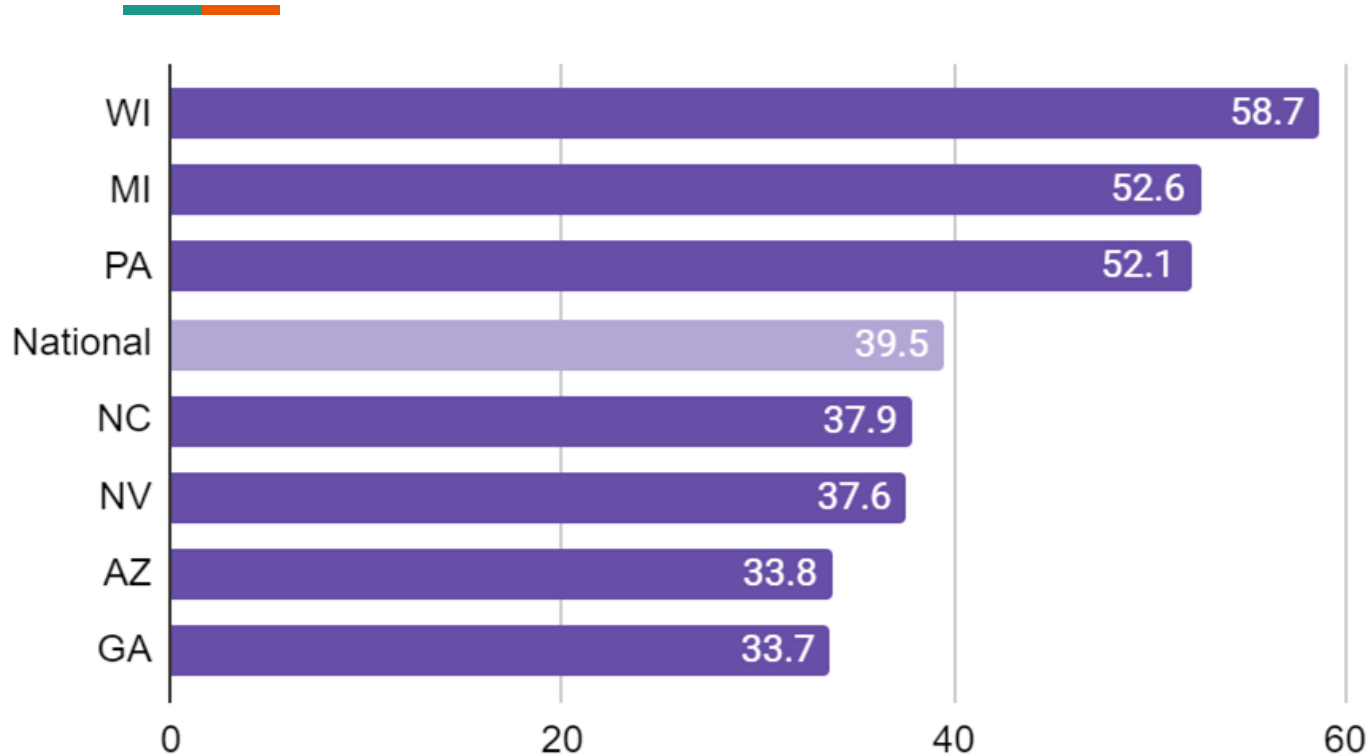
Source: William H. Frey analysis of Current Population Survey Voting and Registration supplement, 2004 -2020 (released April 29, 2021).

**B** Metropolitan Policy Program  
at BROOKINGS

# Shift from 2016 to 2020

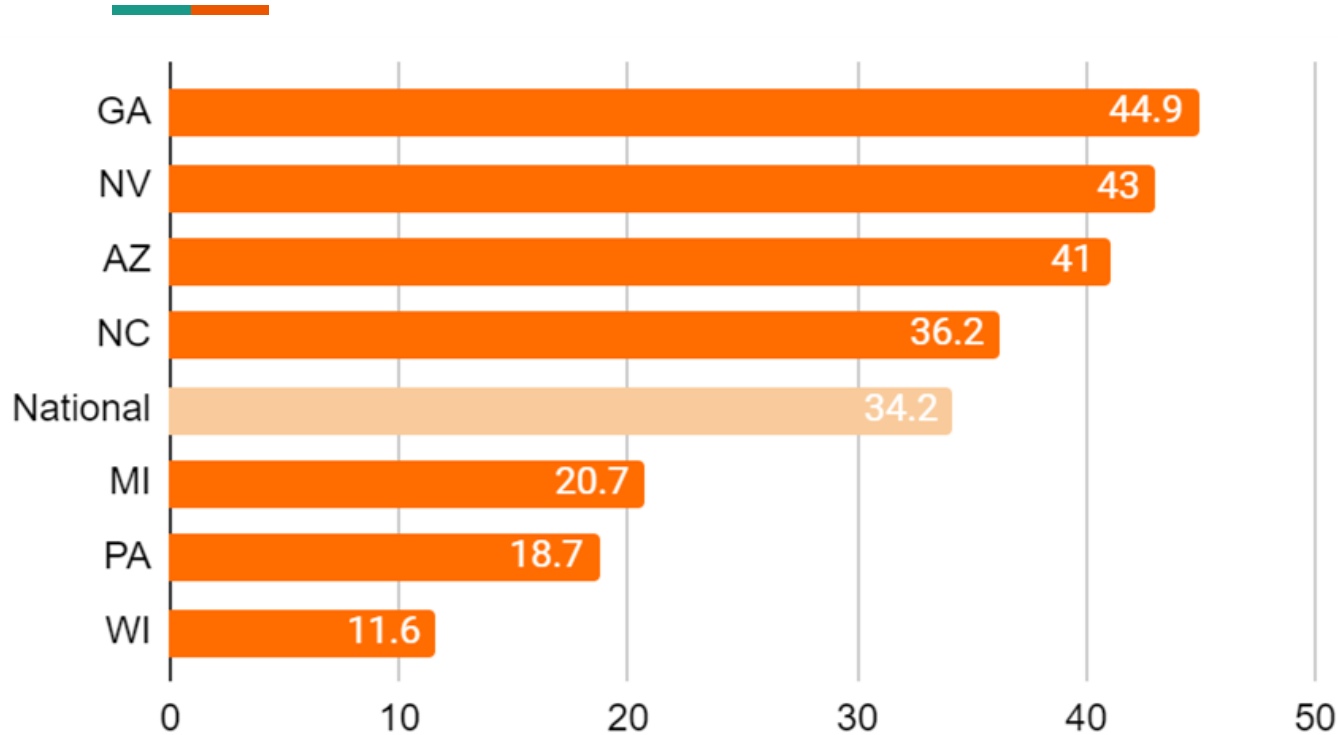


# White, non-college eligible voter population



Half or more of  
eligible voting  
population in  
*Blue Wall*

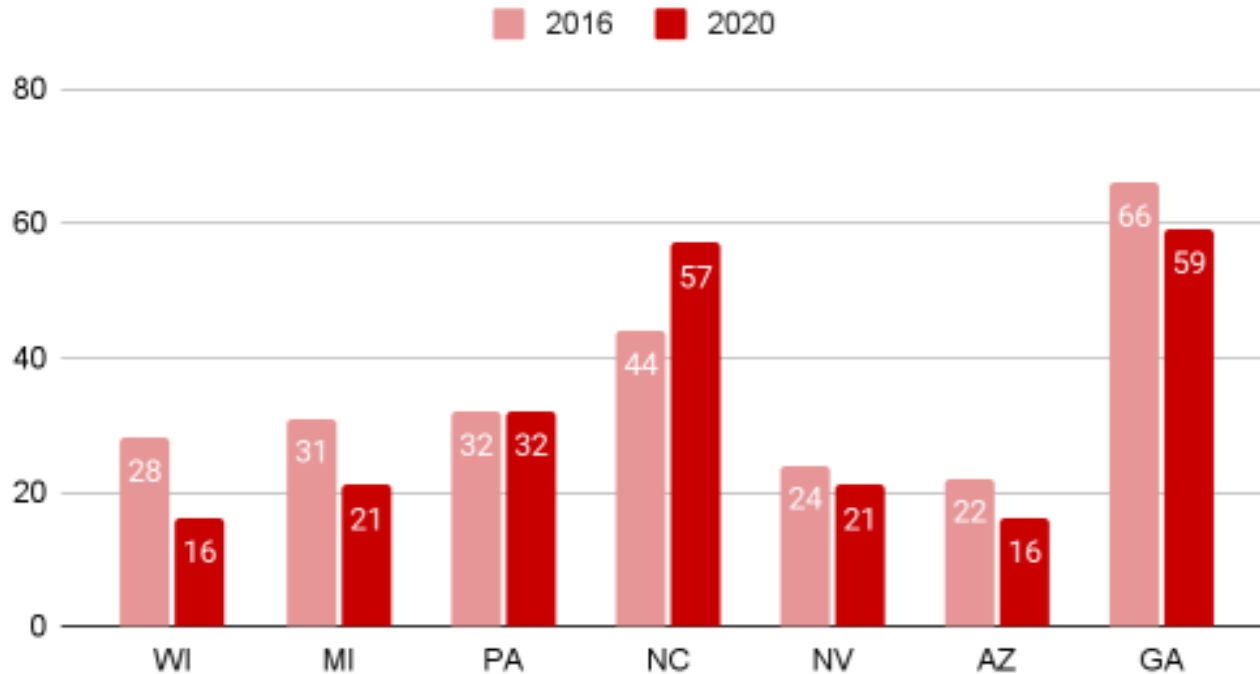
# Nonwhite eligible voter population



The *Sun Belt* states  
are far more  
diverse and  
changing quickly

# Key demographics that explain the shift

## Trump margin of victory with white, non-college voters

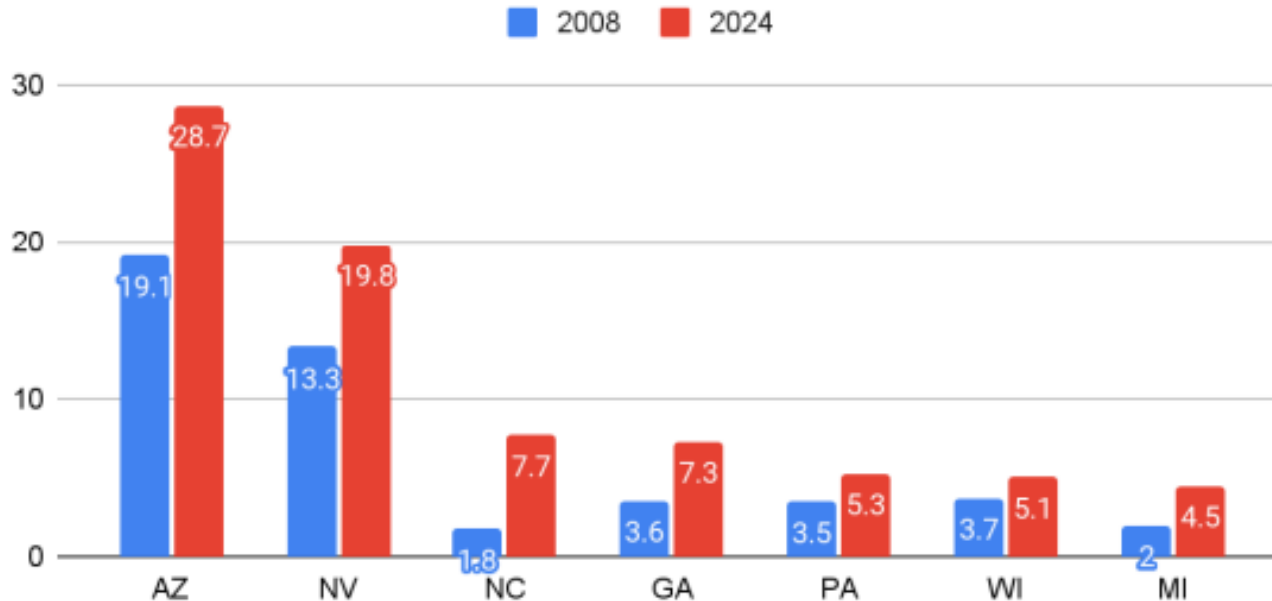


Trump's margins with WNC went down in every swing state except NC and PA.

Southern WNC very different from others.

# Key demographics that explain the shift

Latino eligible voter increase has been significant

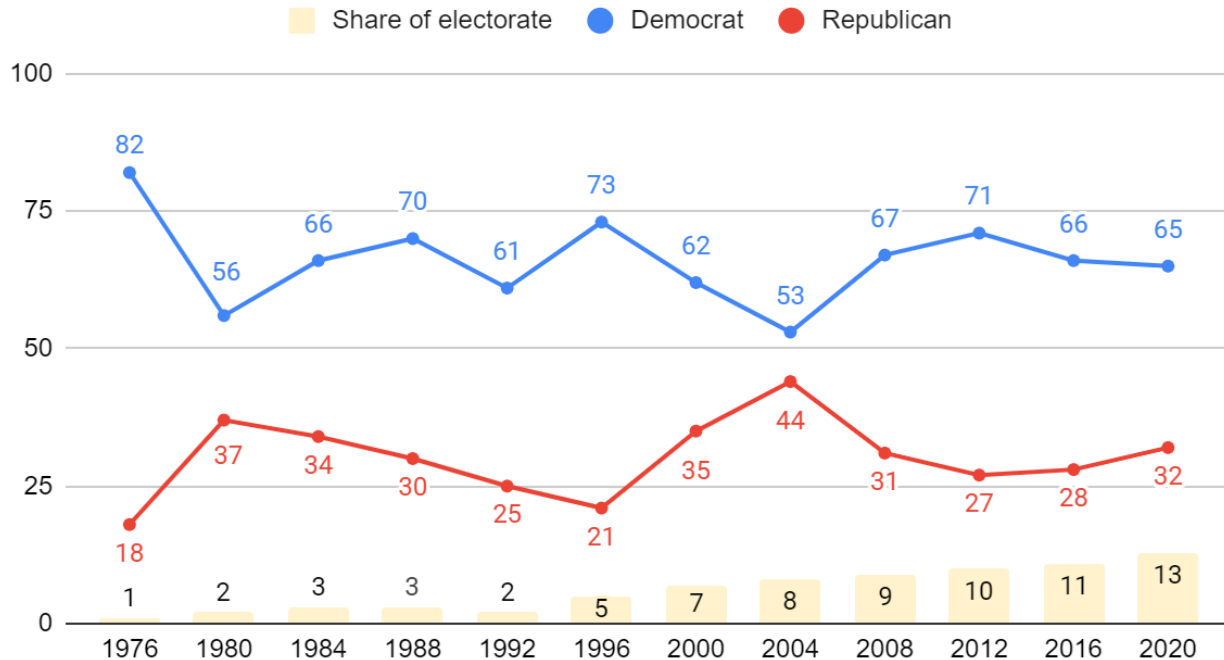


SOURCE: Data from William Frey at the Brookings Institution

Latinos have gone up  
as a share of the  
electorate in every  
swing state since  
2008.

# Key demographics that explain the shift

Latinos are on the rise and have largely sided with Democrats

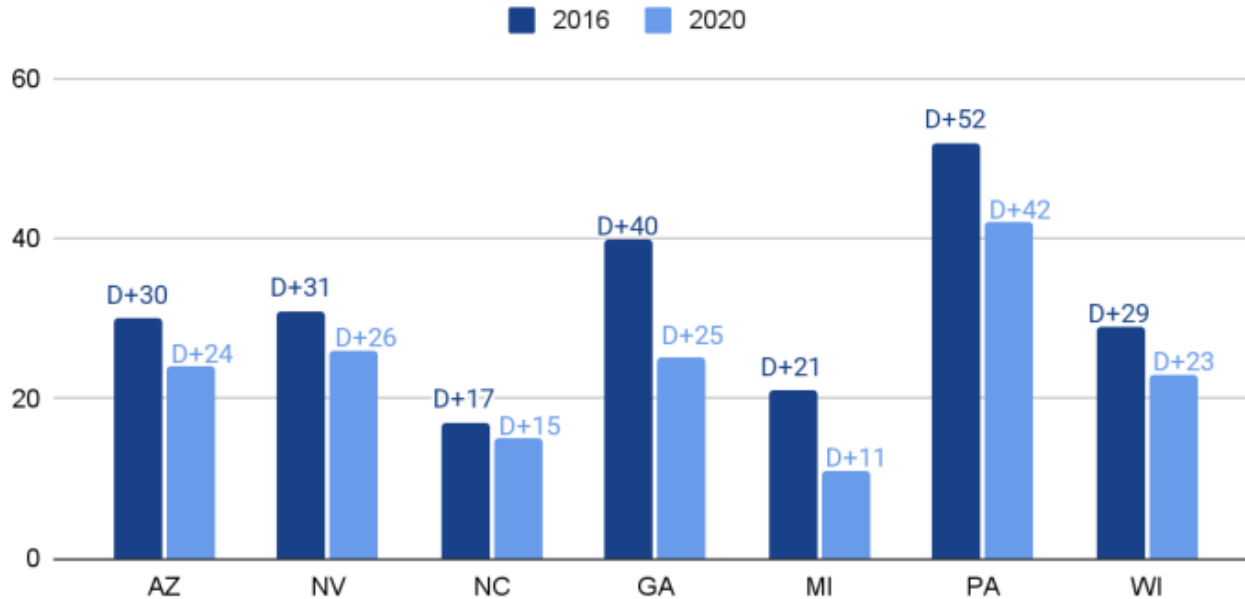


*Biden won 65%* of Latinos in 2020, but that was actually slightly less than Hillary Clinton.



# Key demographics that explain the shift

Democrats saw a decline in Latino margins in each swing state

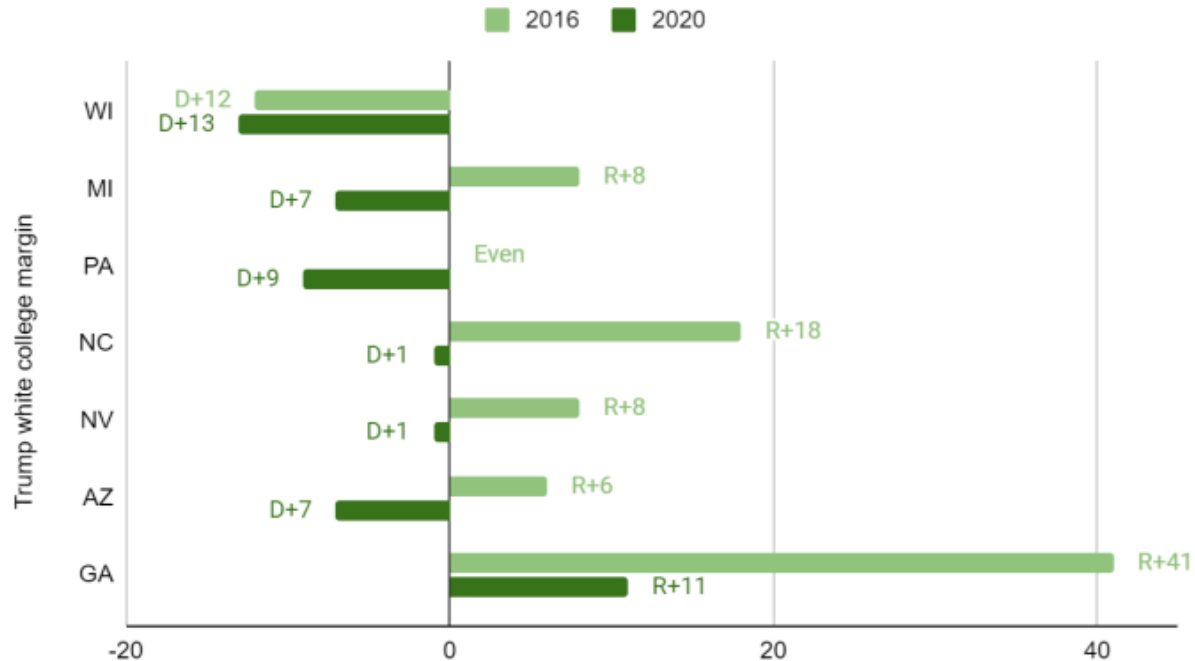


SOURCE: 2020 and 2016 Edison exit polls

Trump cut into margins in swing states with them.

# Key demographics that explain the shift

Trump lost ground with white, college-educated voters in every swing state



Trump won white voters with college degrees in 5 of 7 swing states in 2016.

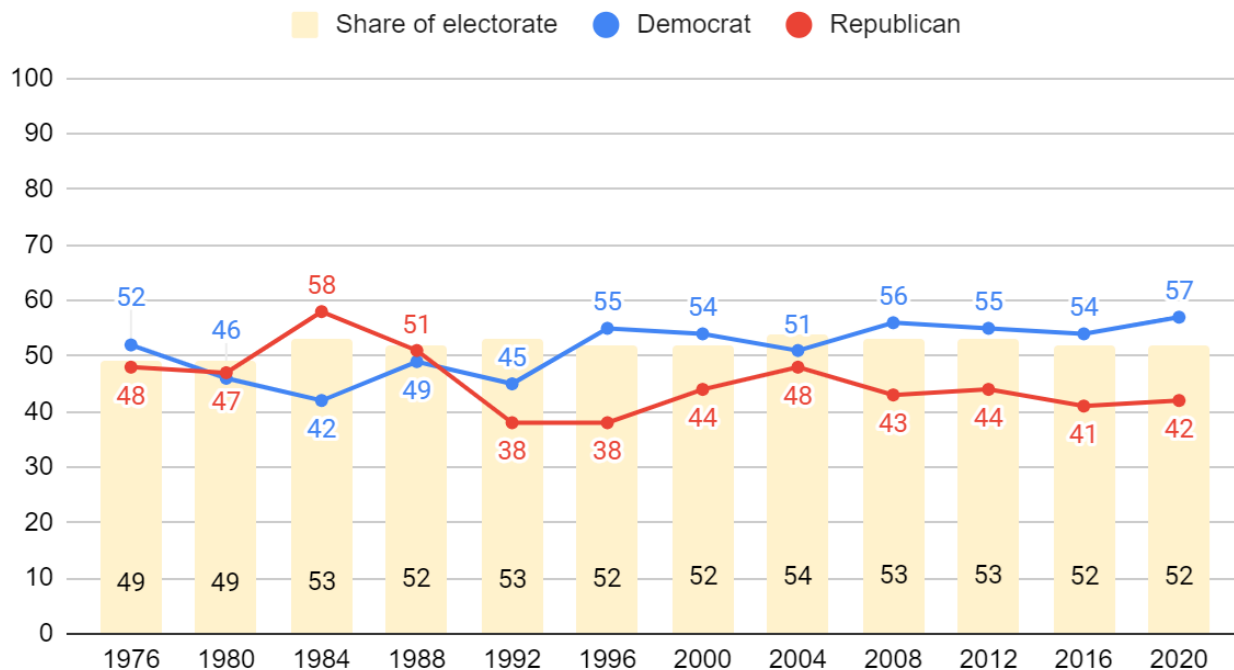
Biden won them in 6 of 7 in 2020.

# Women are key to Democrats' chances

57% of women voted for Biden in 2020, the highest percentage in history.

That's nearly 47 million women, the most ever.

More women sided with Democrats in 2020 than ever before

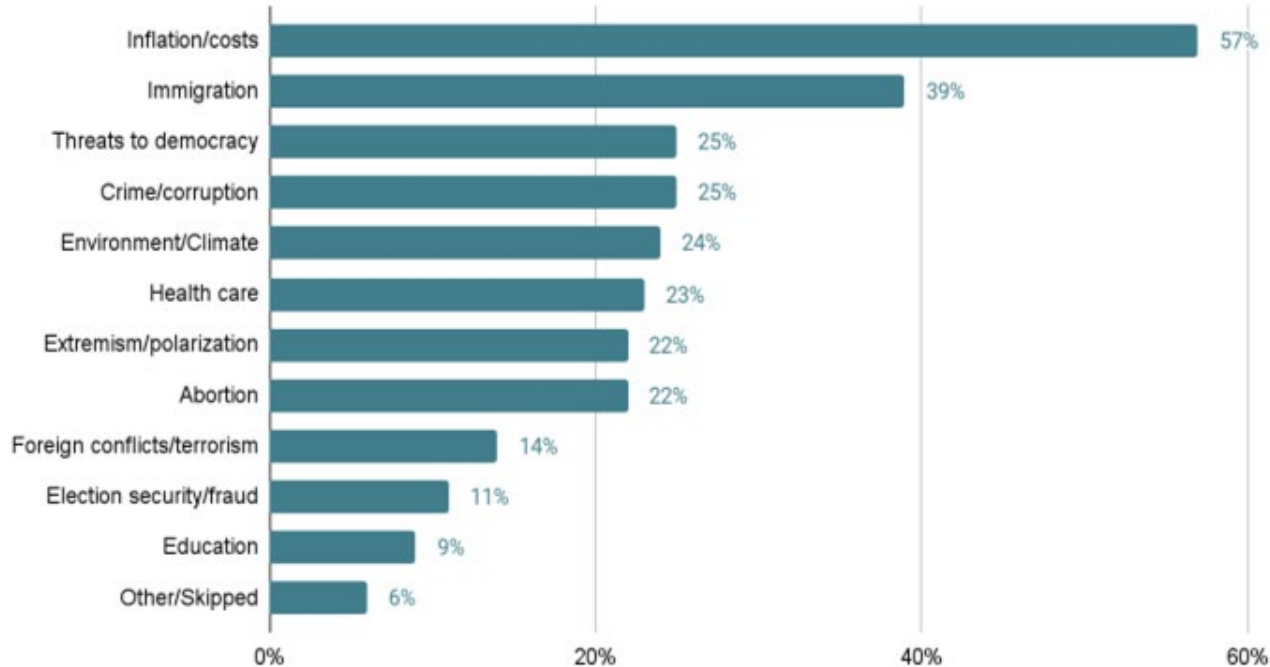


# 2024 state of play



The issues

# Inflation, immigration, democracy top list of issues



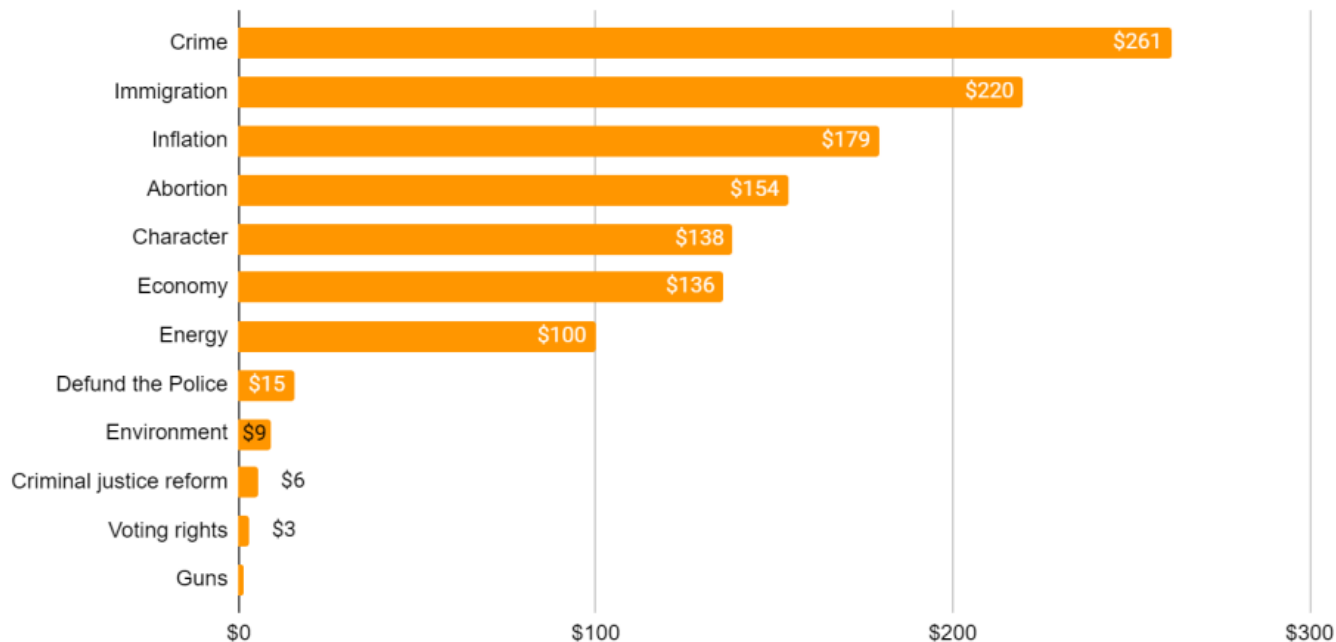
What people rated as the most important issues facing the country.

SOURCE: Ipsos poll, September

# Issue ad spending



More spent on crime and immigration than anything else



## Republicans:

- Immigration
- crime

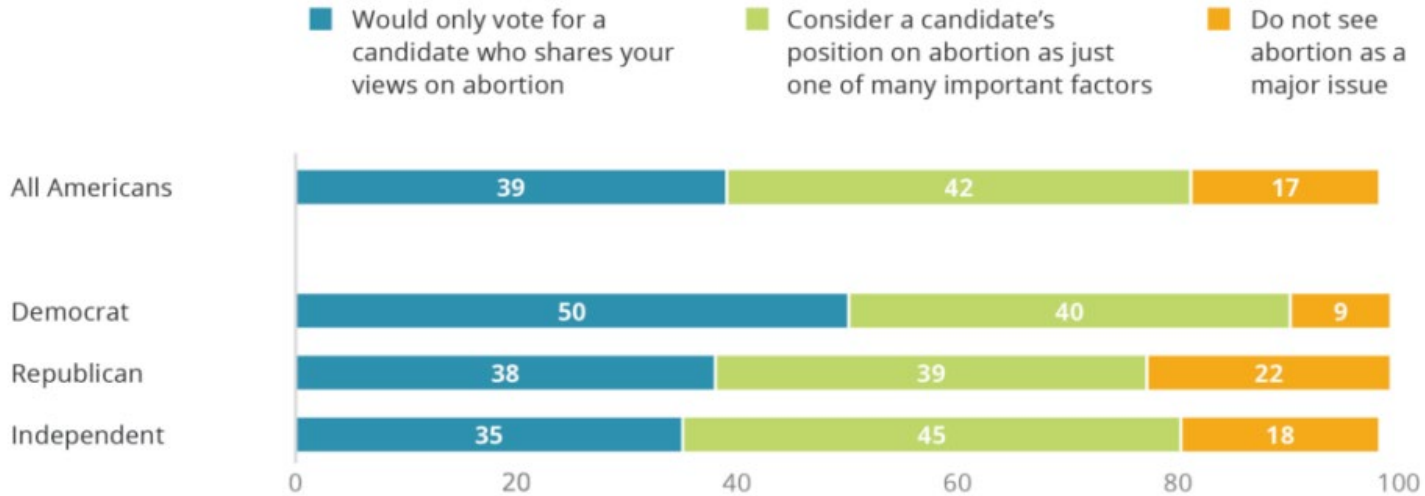
## Democrats:

- Abortion
- Trump's character

# Abortion has become a litmus test... for Democrats

**FIGURE 5. Importance of Candidate's Stance on Abortion, by Party Affiliation**

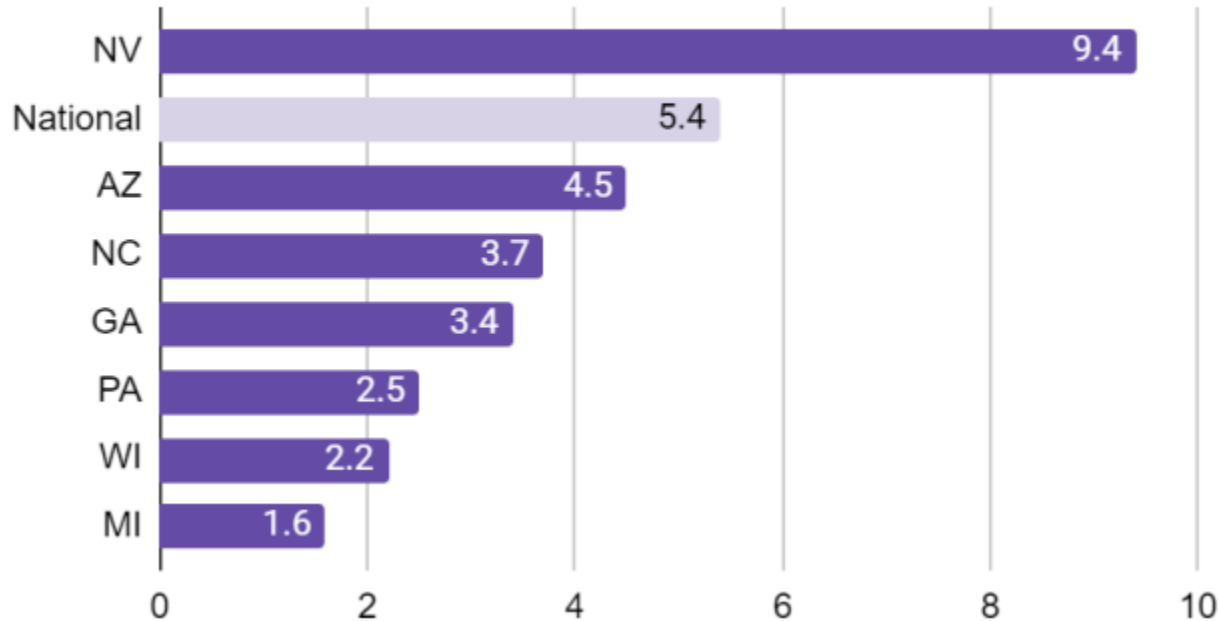
Percent who say they:



Source: PRRI American Values Survey, 2023.

# Key demographics that explain the shift

## AAPI eligible voter population



AAPI voters could make a difference, especially in Nevada.



# Key demographics that explain the shift

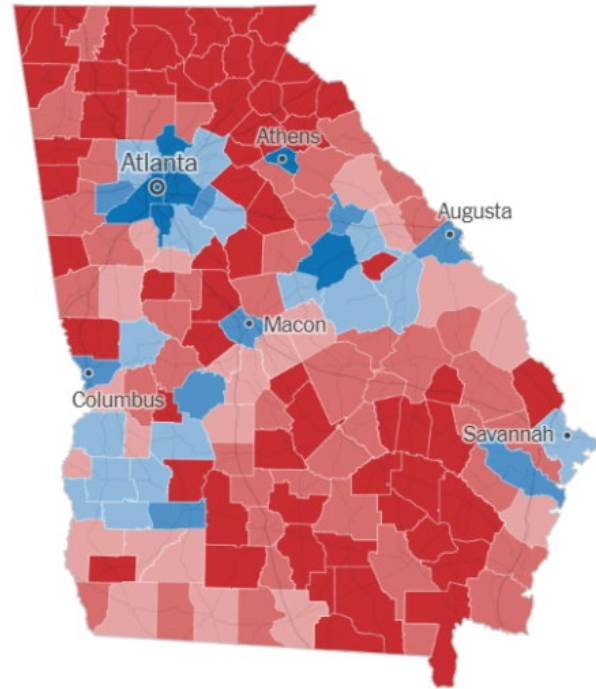
But even in Georgia...

Margin: 11,779

45,000 new AAPI voters

58% for Biden

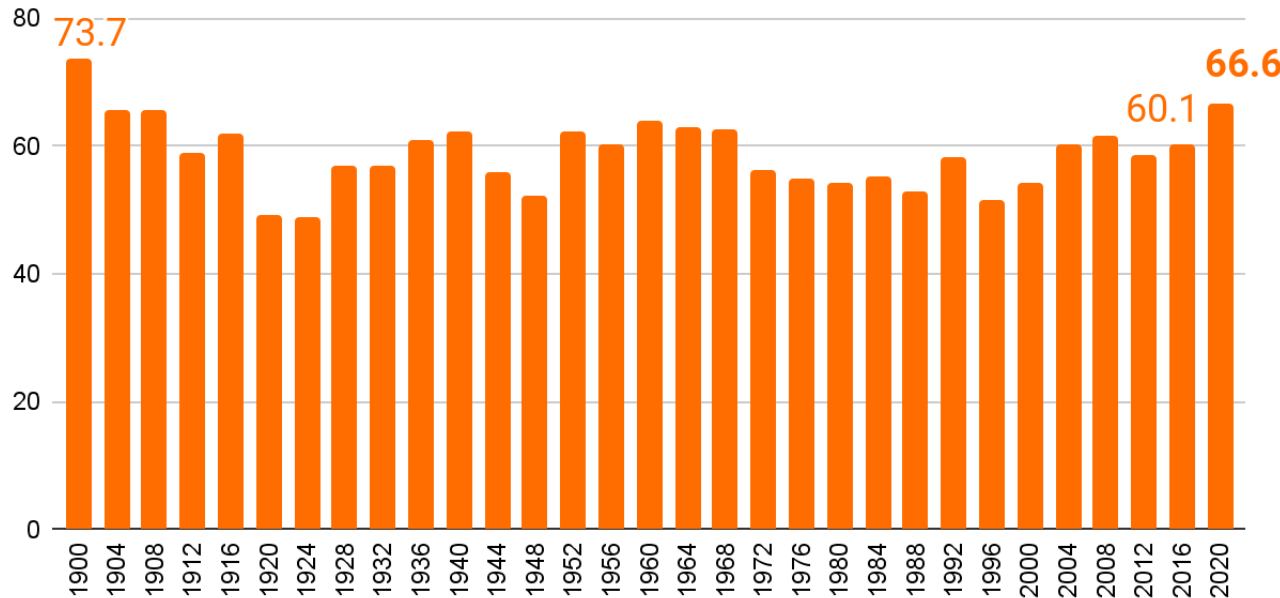
7,000 vote margin just from  
NEW AAPI voters in Georgia.



# Turnout is expected to be lower



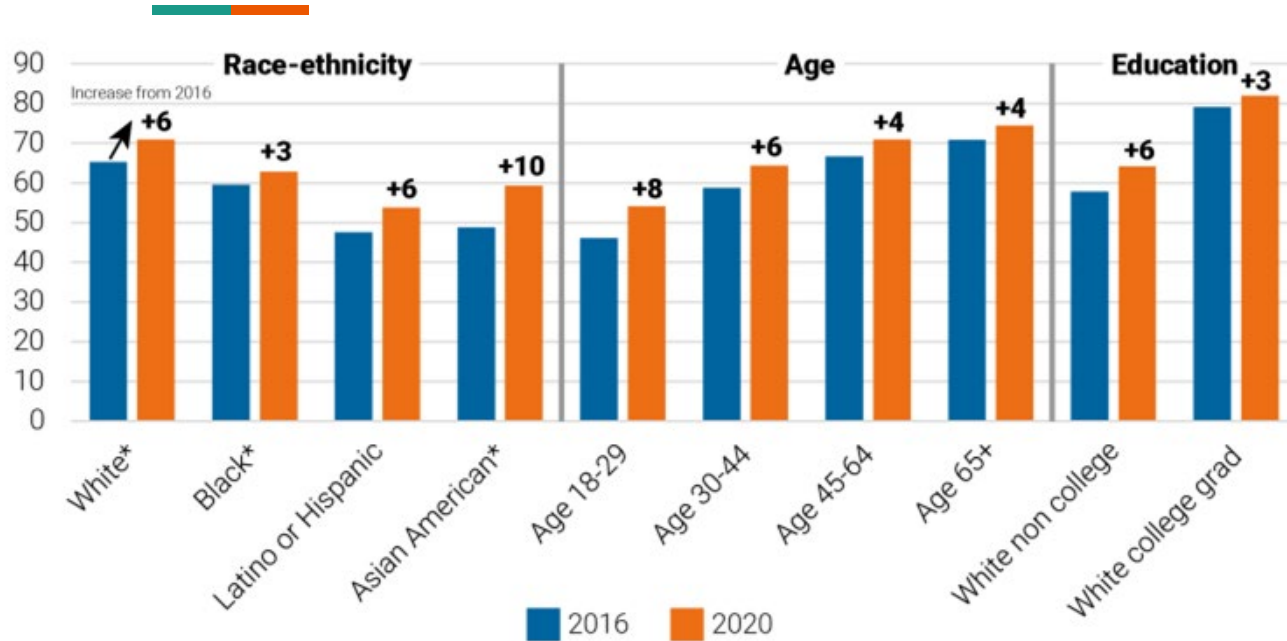
Percent of eligible voters who have turned out



Turnout in 2020 was highest since 1900.

Mail-in voting won't be as widely available; some early voting windows have been curtailed

# Which groups are most likely to vote?



## Harris advantage:

- older voters
- white college-educated

## Harris challenge:

- younger voters
- nonwhite voters

## Trump:

- white, non-college opportunity & challenge

\* Non-Latino or Hispanic members of racial group

Source: William H. Frey analysis of Current Population Survey Voting and Registration Supplement, 2016 and 2020 (released April 29, 2021).

# 2024 state of play

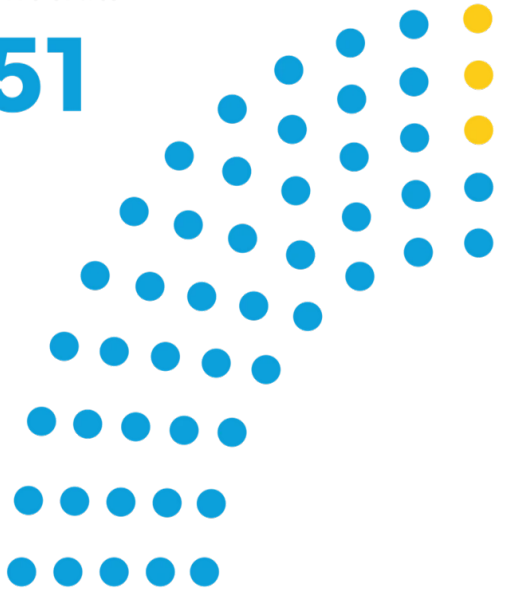


The race for Congress

# Balance of power - Senate

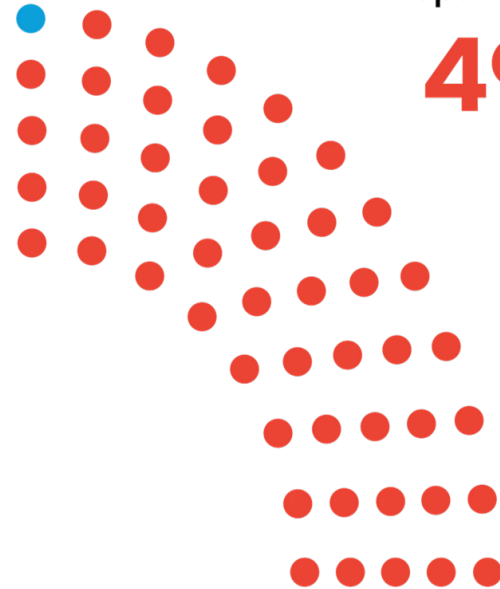
Democrats

51



Republicans

49

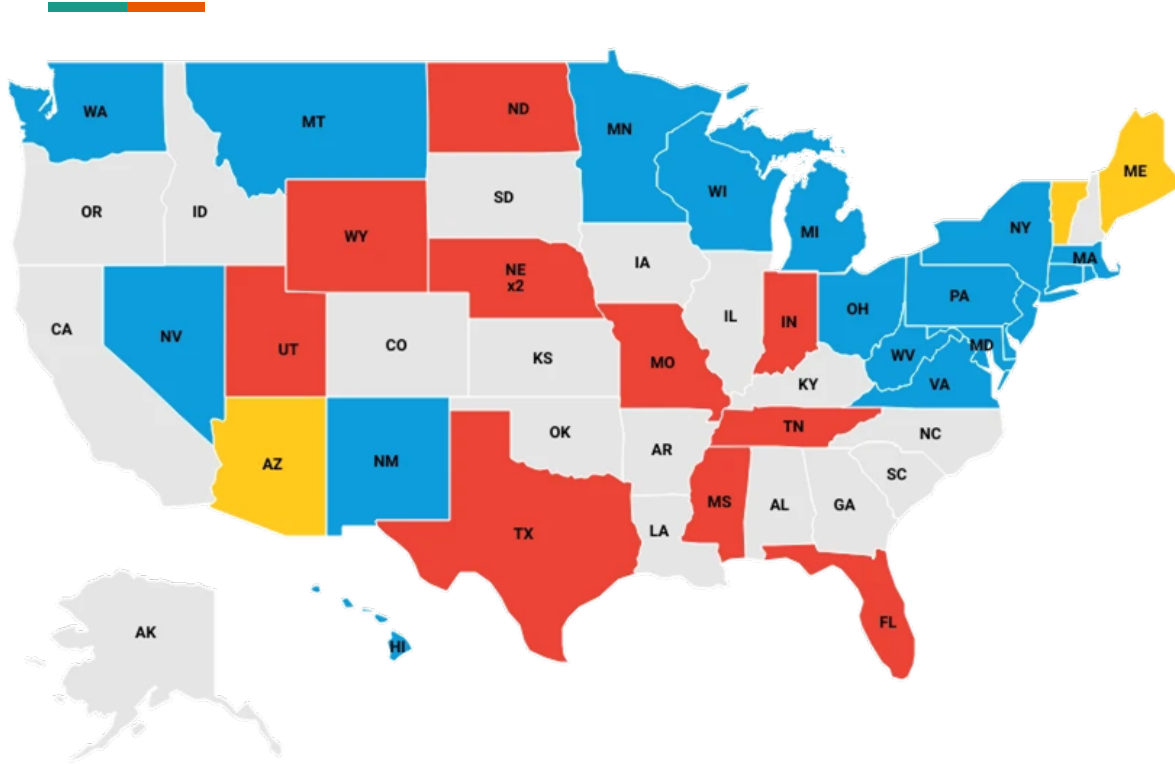


Republicans need a net gain of 2 seats for outright control of the Senate – or 1 plus the White House.

Yellow indicates independents who caucus with Democrats.

Bloomberg Government

# 2024 Senate races



## Democrats

- 23 defending

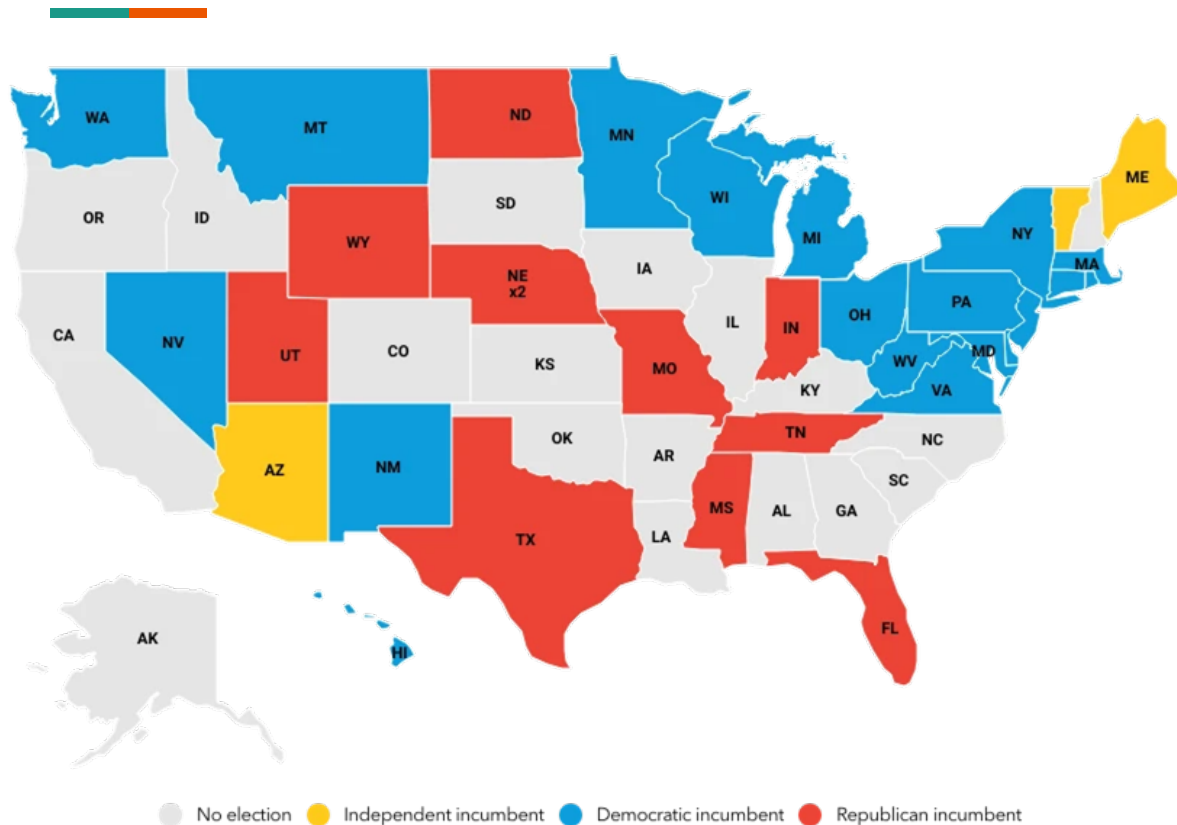
## Republicans

- 11 defending

9 D seats competitive  
to potentially  
competitive

2 R

# Key Senate races



## D seats (9)

SOLID R: WV

LEAN R: MT

TOSS UP: OH

TOSS UP: MI

TOSS UP: WI

LEAN D: AZ

LEAN D: NV

LEAN D: PA

LIKELY D: MD

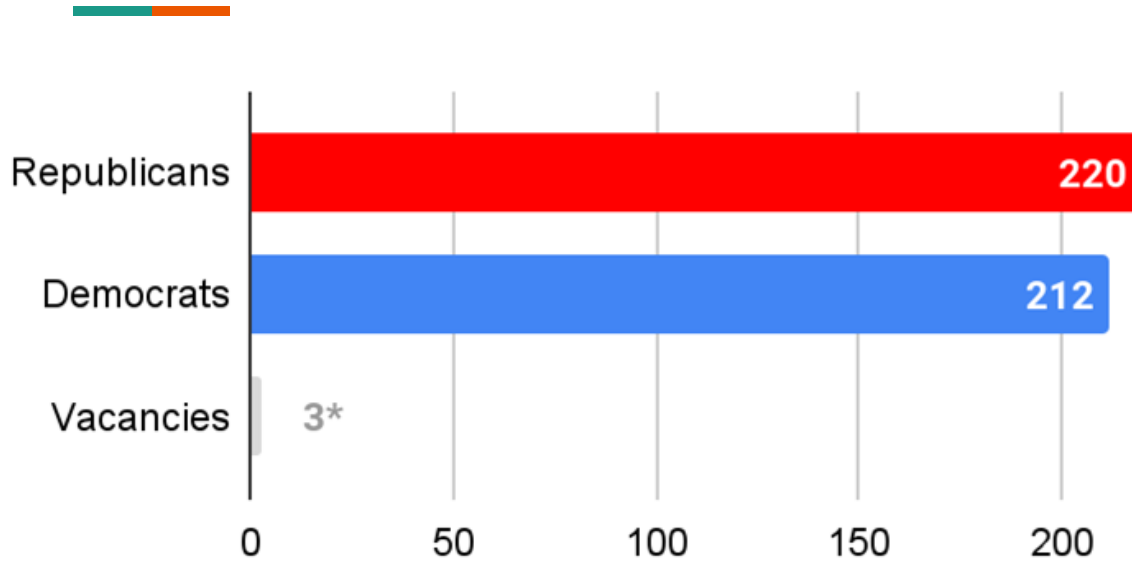
## R seats (3)

LEAN R: TX

LIKELY R: FL

LIKELY R: NE

# Balance of power - House



- Democrats need +4 to pick up House
- Estimates: +5R → +5 D

\* 2 of the vacancies are solid D



# Balance of power - House

LIKELY DEMOCRAT 15 Dem • 1 Rep 0 Ind	LEAN DEMOCRAT 12 Dem • 1 Rep 0 Ind	DEMOCRAT TOSS UP 11 Dem • 0 Rep 0 Ind	REPUBLICAN TOSS UP 0 Dem • 13 Rep 0 Ind	LEAN REPUBLICAN 0 Dem • 6 Rep 0 Ind	LIKELY REPUBLICAN 0 Dem • 10 Rep 0 Ind
AL-02 NEW SEAT CA-09 Harder CA-49 Levin FL-09 Soto KS-03 Davids MD-06 OPEN (Trone) <i>MI-03 Scholten</i> NH-01 Pappas NH-02 OPEN (Kuster) NV-01 Titus NV-04 Horsford <i>NY-03 Suozzi</i> <i>OH-01 Landsman</i> <i>OR-04 Hoyle</i> TX-28 Cuellar WA-08 Schrier	CA-47 OPEN (Porter) CT-05 Hayes <i>IL-17 Sorensen</i> IN-01 Mrvan MN-02 Craig NV-03 Lee <i>NY-18 Ryan</i> <i>NY-22 Williams</i> OH-09 Kaptur <i>OR-06 Salinas</i> <i>PA-17 Deluzio</i> TX-34 Gonzalez VA-07 OPEN (Spanberger)	<i>AK-AL Peltola</i> <i>CO-08 Caraveo</i> ME-02 Golden MI-07 OPEN (Slotkin) MI-08 OPEN (Kildee) <i>NC-01 Davis</i> <i>NM-02 Vasquez</i> <i>OH-13 Sykes</i> PA-07 Wild PA-08 Cartwright <i>WA-03 Perez</i>	AZ-01 Schweikert <i>AZ-06 Ciscomani</i> <i>CA-13 Duarte</i> CA-22 Valadao CA-27 Garcia CA-41 Calvert CA-45 Steel NE-02 Bacon <i>NJ-07 Kean Jr.</i> <i>NY-04 D'Esposito</i> <i>NY-17 Lawler</i> <i>NY-19 Molinaro</i> <i>OR-05 Chavez-DeRemer</i>	IA-01 Miller-Meeks <i>IA-03 Nunn</i> <i>MI-10 James</i> PA-10 Perry <i>VA-02 Kiggans</i> <i>WI-03 Van Orden</i>	<i>CA-03 Kiley</i> CA-40 Kim CO-03 OPEN (Boebert) <i>FL-13 Luna</i> FL-27 Salazar <i>MT-01 Zinke</i> <i>NY-01 LaLota</i> PA-01 Fitzpatrick <i>TX-15 De La Cruz</i> WI-01 Steil

SOURCE: Cook Political Report

# Balance of power - House

38D  
31R

LIKELY DEMOCRAT 15 Dem • 1 Rep 0 Ind	LEAN DEMOCRAT 12 Dem • 1 Rep 0 Ind	DEMOCRAT TOSS UP 11 Dem • 0 Rep 0 Ind	REPUBLICAN TOSS UP 0 Dem • 13 Rep 0 Ind	LEAN REPUBLICAN 0 Dem • 6 Rep 0 Ind	LIKELY REPUBLICAN 0 Dem • 10 Rep 0 Ind
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SOURCE: Cook Political Report

# Balance of power - House

38D  
31R

69 of 435  
or just 16%

LIKELY DEMOCRAT 15 Dem • 1 Rep 0 Ind	LEAN DEMOCRAT 12 Dem • 1 Rep 0 Ind	DEMOCRAT TOSS UP 11 Dem • 0 Rep 0 Ind	REPUBLICAN TOSS UP 0 Dem • 13 Rep 0 Ind	LEAN REPUBLICAN 0 Dem • 6 Rep 0 Ind	LIKELY REPUBLICAN 0 Dem • 10 Rep 0 Ind
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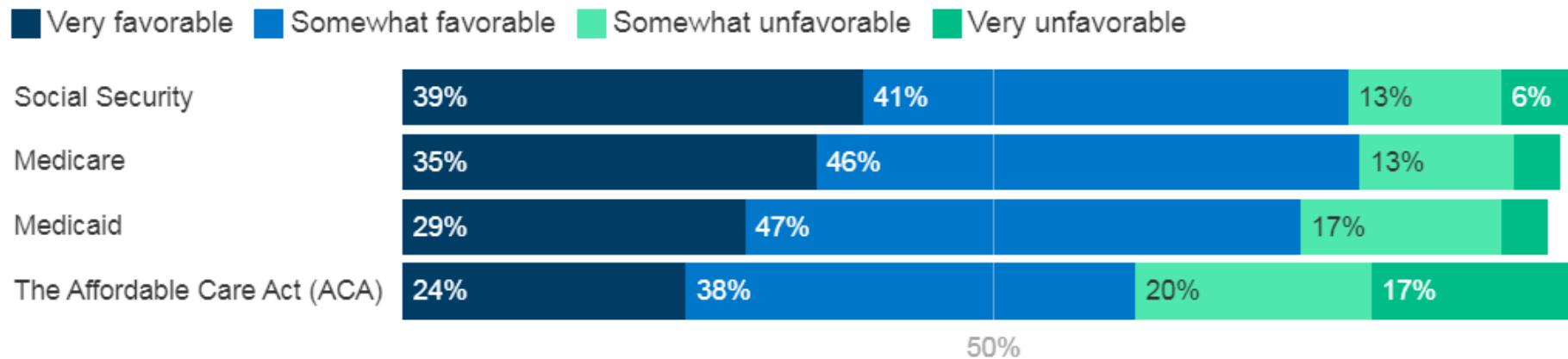
SOURCE: Cook Political Report

# 2024 state of play



Role of health care

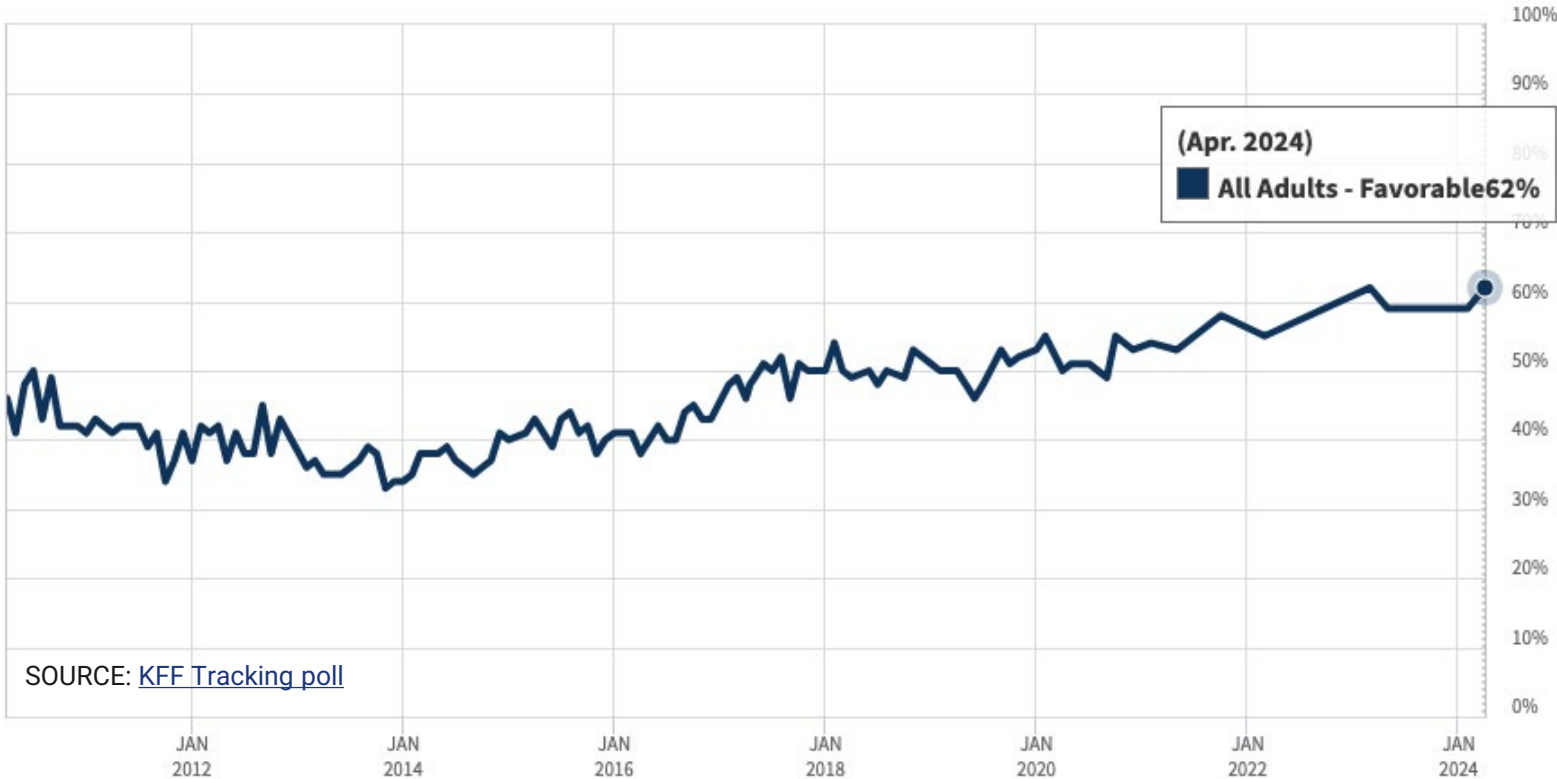
# 2024 state of play



NOTE: See topline for full question wording.

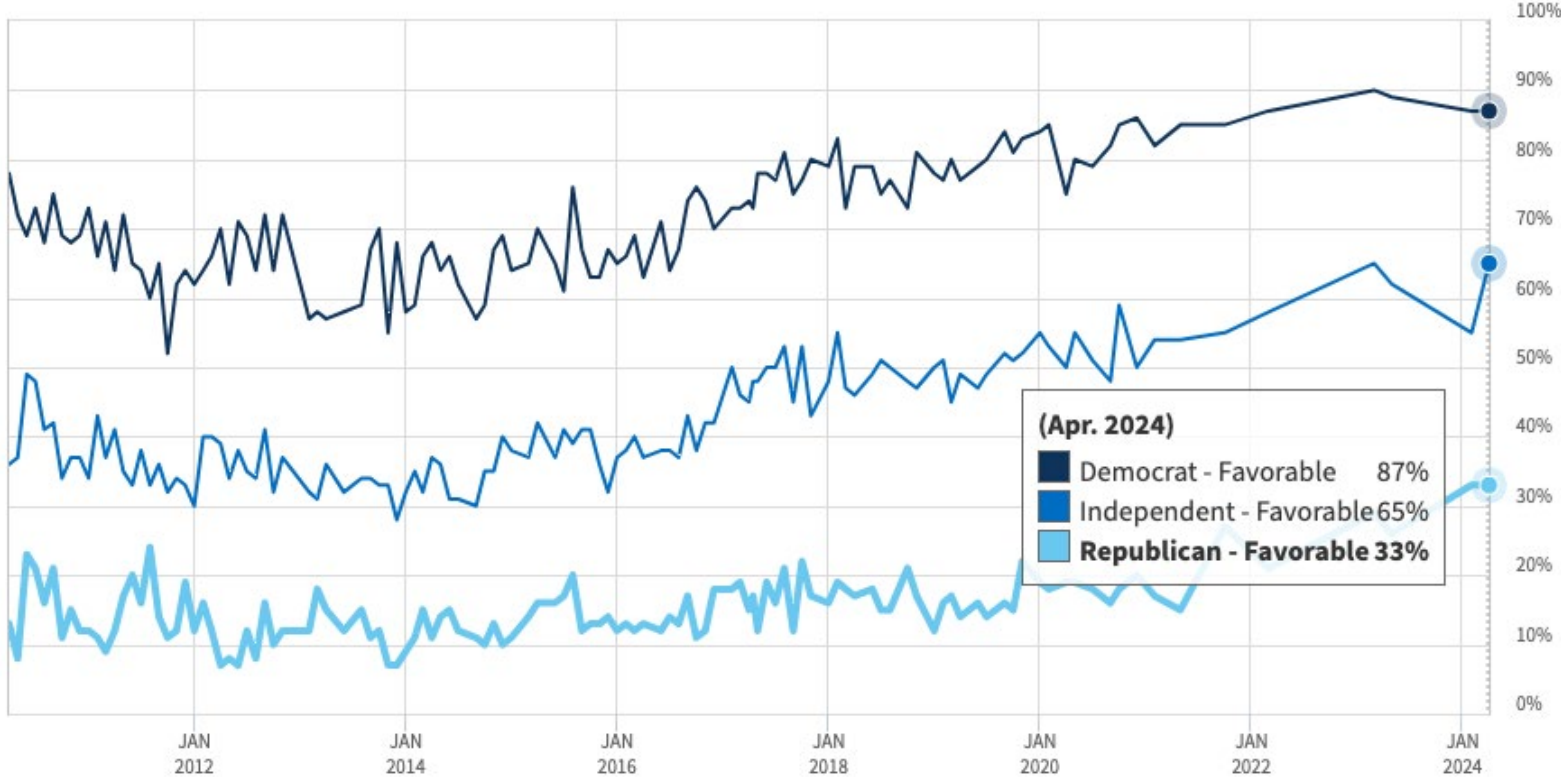
SOURCE: KFF Health Tracking Poll (March 14-23, 2023) • [PNG](#)

# The ACA's popularity has grown



SOURCE: [KFF Tracking poll](#)

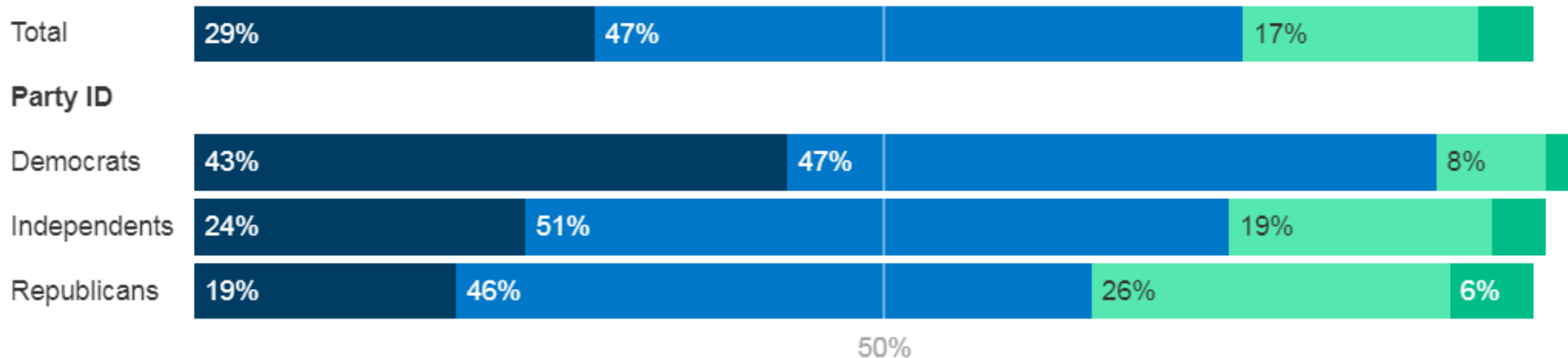
# The ACA's popularity has grown



# Positive views of Medicaid across parties

In general, do you have a favorable or unfavorable opinion of **Medicaid**, the federal-state government health insurance for certain low-income adults and children and long term care program for adults 65 and older and younger adults with disabilities?

Very favorable   Somewhat favorable   Somewhat unfavorable   Very unfavorable



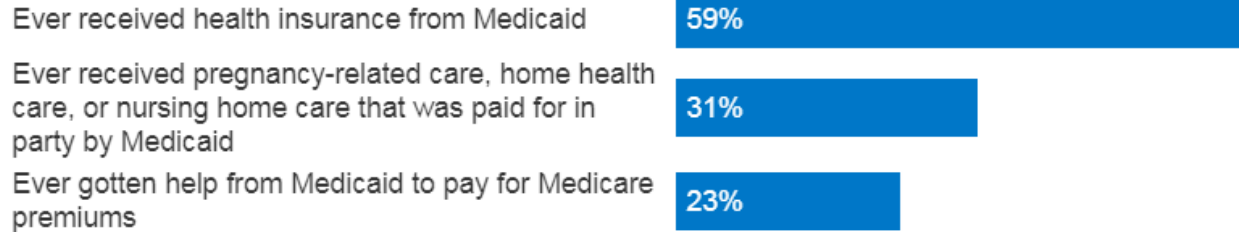
NOTE: See topline for full question wording.

SOURCE: KFF Health Tracking Poll (March 14-23, 2023) • [PNG](#)



# Two-thirds have a connection to Medicaid

## Share of adults who say that themselves, their family members, or their close friends have...



## Share of adults who have ever had a child ever covered by Medicaid



## Share of adults who have a connection to Medicaid

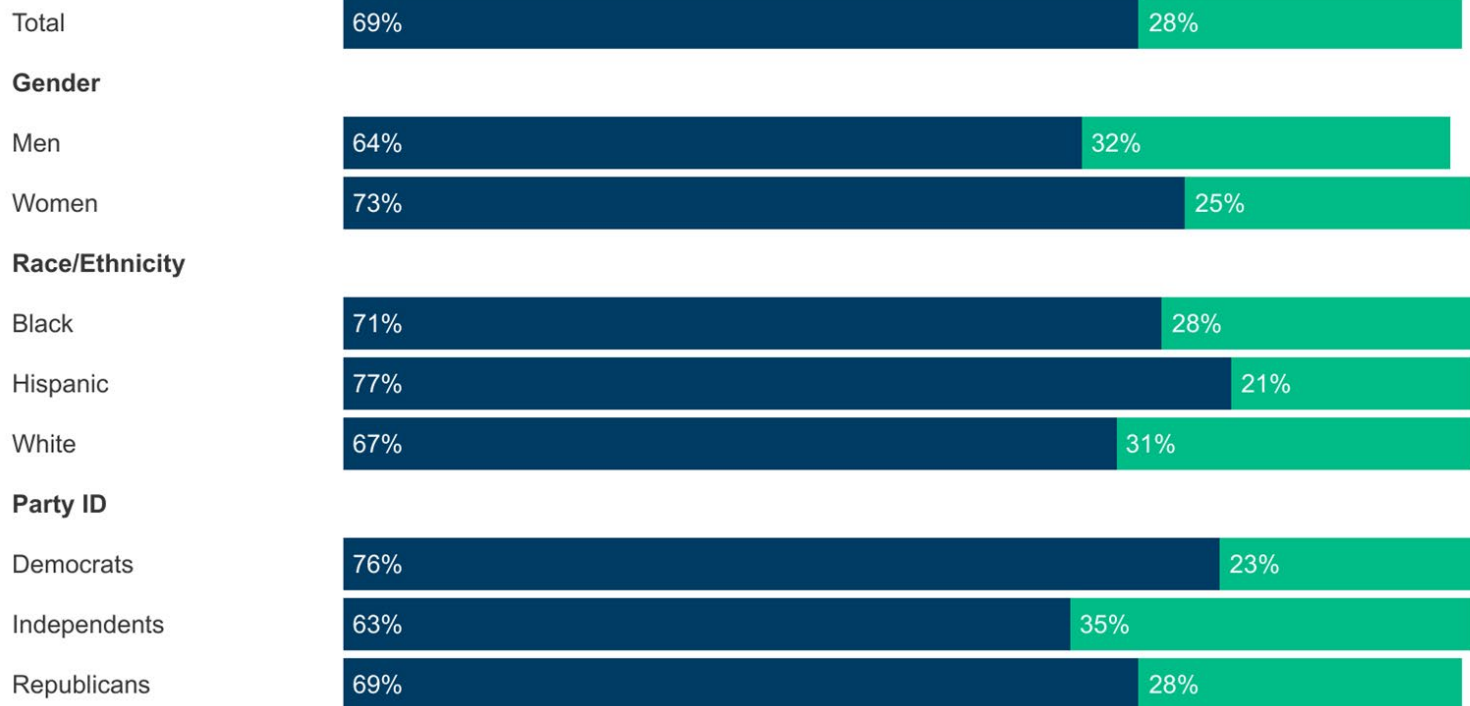


NOTE: See topline for full question wording.

SOURCE: KFF Health Tracking Poll (March 14-23, 2023) • [PNG](#)

# Most say Medicaid is working well

Working well Not working well



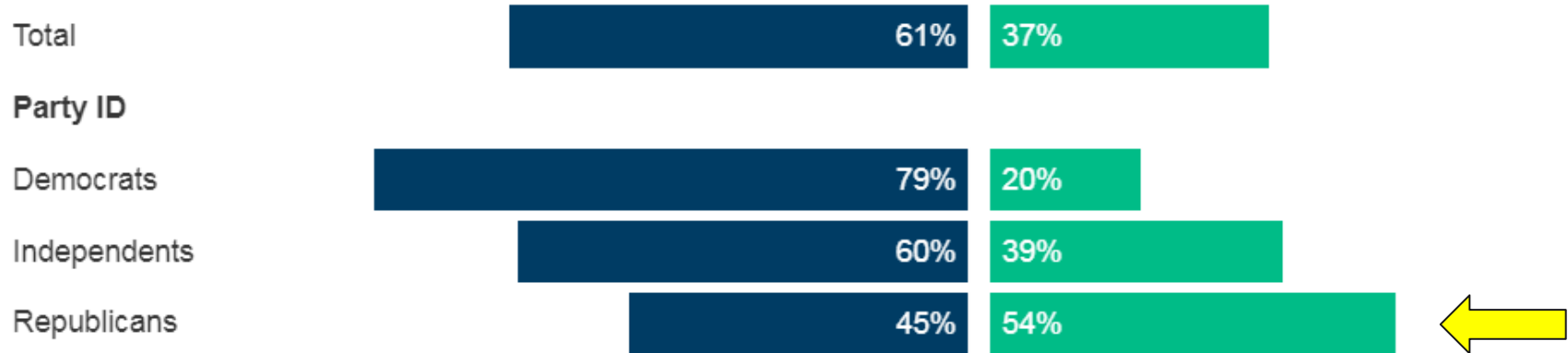
# Slim majority of Republicans see it as “welfare”



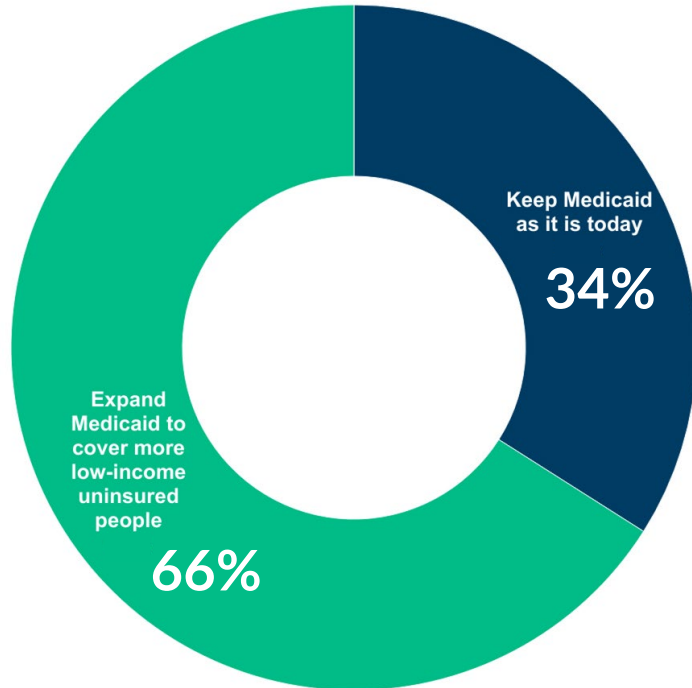
Which comes closer to your view?

Medicaid is primarily a government health insurance program that helps people pay for health care

Medicaid is primarily a government welfare program



# Support for expansion in non-expansion states



Two-thirds of people in non-expansion states want their state to expand their Medicaid programs.

NOTE: Among those who live in states that have not expanded Medicaid (AL, FL, GA, KS, MS, SC, TN, TX, WI, WY). See topline for full question wording.

SOURCE: KFF Health Tracking Poll (April 23-May 1, 2024)

# Health care playing vital role in campaign



\$147 million in ads since March that focus on health care

- 115 different ads
- Abortion rights
- Price of insulin
- Access to birth control

## Democrats focusing on women's health care

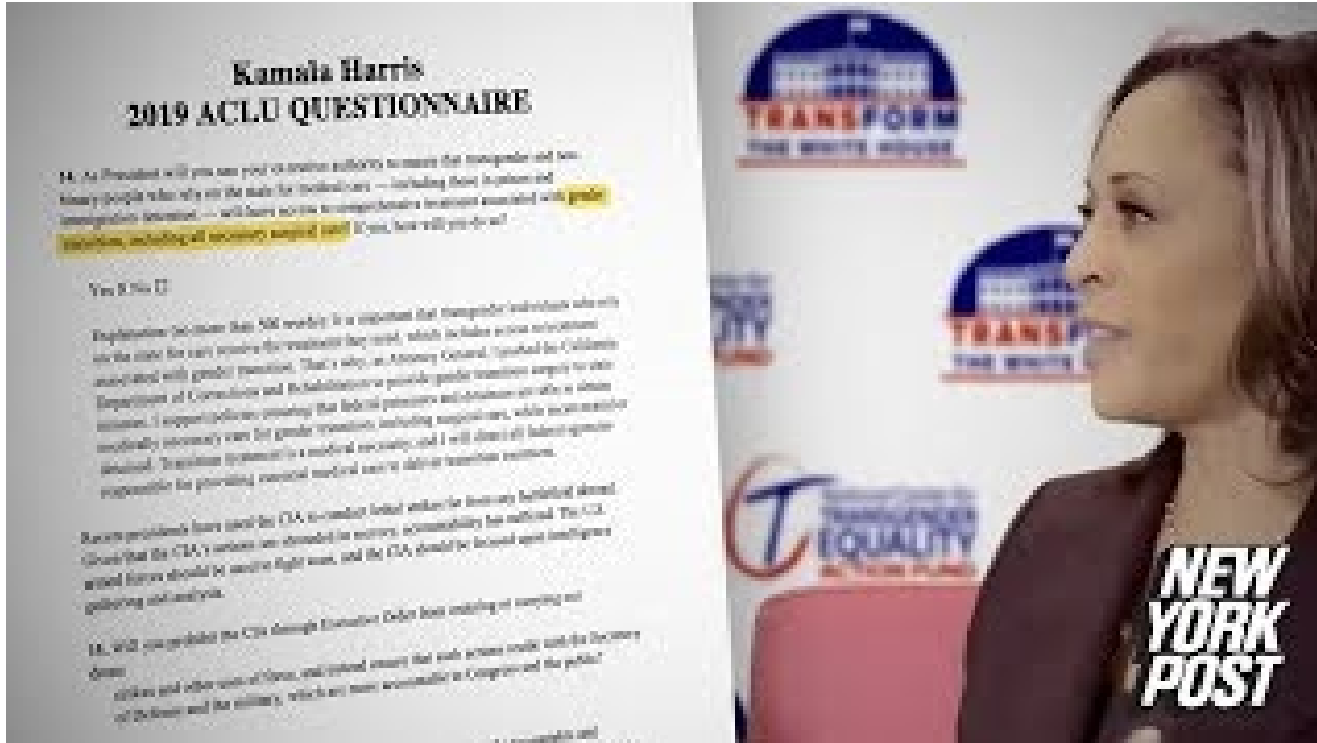
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...but also Trump's "concepts of a plan"



# Trump hitting Harris over gender-affirming care



## FACT CHECK:

Harris said this in 2019 about “medically necessary” procedures.

Her campaign now says, “This is not what she’s proposing; it’s not what she’s running on.”



## Key dates



**Sept. 16:** Early voting begins (parts of Pennsylvania)

**Nov. 5:** ELECTION DAY

**Dec. 17:** Electors vote in states

**Dec. 25:** Electoral votes arrive in D.C.

**Jan. 3:** Archivist transfers certificates to Congress

**Jan. 6:** Congress counts electoral votes

**Jan. 20:** Inauguration