

## THE POST- POLITICAL REALIGNMENT ELECTORAL COLLEGE MAP

May 15, 2020

For many Americans Memorial Day typically marks the unofficial beginning of summer, but for presidential political campaigns it is also the time they begin to map out their Electoral College strategy for November.

It is generally accepted that Trump's victories in the Rust Belt states of Michigan, Pennsylvania, and Wisconsin handed him the presidency in 2016 ([Map](#)). So it stands to reason that many political pundits are squarely focused on this path for a Biden victory in 2020. But the fact is that it isn't Biden's easiest route to the White House.

There's no question that Donald Trump's presidency has changed politics in our country. But he didn't force a political realignment; he merely accelerated the one that began in the early 1990's. Trump has never faced voters since the completion of this realignment, and any analysis of the upcoming presidential election must factor in how these changes will impact the 2020 outcome.

While Trump may not have invented tribal politics, he has done everything possible to exploit them - both in his 2016 campaign and throughout his presidency. Any short-term benefits that he may have derived in his last campaign could now lead to his defeat this November.

Today, the most important drivers of electoral outcomes are age, race, gender, and education. Trump's divisive approach to governing and his acrimonious public policy fights have driven women, suburban, and college-educated voters away from the Republican Party. Since Trump became President the GOP has lost 41 congressional seats, costing them control of the House of Representatives. In the states, Republicans have lost 10 governorships, while Democrats have taken full control of state government in 10 states.

Trump is facing a two-front war in his campaign to win a second term. In addition to facing challenges in key states that are trending Democratic, Trump must also deal with the health and economic devastation caused by COVID-19 in states that he narrowly won in 2016.

### **The Rust Belt: Traditional Battlegrounds**

Trump's chances of winning Michigan, which he carried by 11,000 votes in 2016, have been significantly reduced, given the impact of COVID-19 in the state. It is difficult to overstate how much Michigan has been impacted by the coronavirus.

There have now been over 4,700 deaths in the state – the fourth highest in the country. Michigan was one of the hardest hit states during the Great Recession of 2008, and was slow to recover from it. The state's economy is also more cyclical than the national average, with a heavy dependency on manufacturing in general, and the auto industry in particular. Fourteen percent of its workforce had manufacturing jobs prior to the pandemic. The National Tax Foundation reports that as of May 9<sup>th</sup>, 20.9% of the workforce in the state – one in five – has filed for unemployment insurance claims since the outbreak of the virus.

Democrats have done well in Michigan since Trump became President. In 2018, Democrats picked up the governorship, two congressional seats, and 10 state legislative districts. Governor Gretchen Whitmer, who has been publicly at odds with Trump, has earned a 72% favorable rating on her handling of the coronavirus. An April 22<sup>nd</sup> Fox poll had Biden leading Trump by 49% to 41% in Michigan.

Pennsylvania has almost been as hard hit as Michigan and will also be a tough slog for Trump this November. Pennsylvania has had over 4,200 deaths since the outbreak of the virus – the fifth highest in the country.

The state is also particularly at risk economically due to the coronavirus. In an April report by Wallethub, a personal finance website, Pennsylvania ranked number six among the most vulnerable states in the country due to its economic structure. Since the outbreak, 17.35% of its workforce has filed unemployment claims.

Democrats have also been successful politically in Pennsylvania since Trump took office. In 2018, Democratic Governor Tom Wolf easily won a second term, while Democrats picked up three congressional House seats and 16 state legislative districts. The governor remains popular and has a 72% approval rating for his handling of the coronavirus.

The staggering health and economic consequences from COVID-19 in Pennsylvania, combined with Biden's "favorite son" status in the state, make this another very difficult hill for Trump to climb in the fall. An April 22<sup>nd</sup> Fox poll had Biden leading Trump by 50% to 42% in the state.

Of the three Rust Belt states, Trump is best positioned in Wisconsin, where his job approval ratings have remained higher than the national average. An early May Marquette University poll shows Trump with a 47% approval rate, which is above his national average. In 2016, Trump flipped 23 counties in the state (out of 72) that had previously voted for Obama.

While Republicans did not have a great year in Wisconsin in 2018, they fared relatively better compared to other states in the country. Despite Republican Governor Scott Walker's narrow defeat, the GOP did not lose any House or state legislative seats. The Democrats have picked up two state supreme court seats over the past two years.

The state's demographics continue to be very favorable for Trump. This is one of the more rural states in the country. In 2016, white voters constituted 90% of turnout, 58% of which were non-college educated.

Sufficient evidence suggests that Trump could build on his success in 2020. William Frey from the Brookings Institute estimates that there are 459,000 non-college educated white men who did not vote in Wisconsin in the 2016 elections. This pool of potential voters gives the Trump campaign ample opportunity to build on his narrow 22,748 vote victory in 2016.

The Trump campaign is clearly focused on these voters, which they highlighted in a December 2019 meeting with reporters. At that briefing Jared Kushner and campaign manager Brad Parscale laid out their strategy for Wisconsin. They indicated that their focus will be on the 48 smallest counties, which constitute 22% of the statewide vote. These areas have the profile of potential Trump supporters – older, white, rural, and non-college educated.

Luckily for Biden, Wisconsin isn't a must win state. If Biden carries Michigan, the Electoral College calculus would completely tilt in Biden's favor. If Michigan and Pennsylvania were to land in Biden's column, as they are currently favored to do, then he would only be two Electoral College votes short of 270.

### **The Emergence of the South and West as the New Democratic Base**

With the completion of the country's political realignment, there is an emerging new Democratic blue wall in presidential politics. There are seven western states – California, Colorado, Hawaii, Nevada, New Mexico, Oregon, Washington – with a total of 98 electoral votes that are firmly in the Democratic column.

There are another six states in the south and the southwest – Arizona, Florida, Georgia, North Carolina, Texas, and Virginia – that are in various stages of becoming Blue states. When the political transformation is complete, these states will contribute to Democrats' base of 220 electoral votes from the southern and western points of the country.

Outside of Virginia, which has already become a blue state, Arizona is the state most likely to transition to a Democratic base state as early as November.

According to Census data, since 2010 Arizona has been the fast-growing state in the country. It is now second only to Texas in terms of migration from California. Maricopa County, which encompasses highly suburban Phoenix, Scottsdale, and Tempe, is now the fourth largest county in the country.

The state's growth has largely come from the demographic groups most opposed to Trump – younger, non-white, and college-educated voters. They increasingly make up a higher percentage of the electorate.

Between 2014-2018 there was a 13.5% increase in Arizona's Hispanic voting age population, compared to only a 4.3% growth in white non-Hispanic registration. Hispanic turnout rose 25% between 2014 and 2018. Not surprisingly, these population changes have contributed to a significant political tilt toward Democrats in Arizona.

Just since the start of this year Democratic registered voters in Maricopa County have grown by nearly 26,000, while Republicans registered active voters have decreased by just under 5000 people.

The decline for Republicans in the state is directly tied to their diminishing support in Maricopa County, which comprises over 60% of the statewide vote. Trump won the state by less than 91,000 votes, compared to Romney's 208,000 vote margin in 2012. The decline in support for Trump was largely due to his three percent victory over Hillary Clinton in the county, which was significantly less than Romney's 11-point margin over Obama in 2012.

This trend continued in 2018 when Kyrsten Sinema became the first Arizona Democrat to be elected to the U.S. Senate in 30 years. Her 55,900-vote victory was due entirely to her 60,236-vote margin in Maricopa County.

Democrats also picked up a congressional seat, giving them a majority of House members in the state. Republicans have only a narrow two-seat majority in the state House and a four-seat majority in the senate.

Biden should also be aided by the Senate race in the state where Democratic challenger Mark Kelly currently has a nine-point lead and a \$9.5 million cash-on-hand advantage over appointed Republican incumbent Martha McSally.

North Carolina is another state that has been moving toward the Democratic Party since Trump took office. In 2018, Democrats picked up 10 state house seats and six senate ones. The political environment is no better for Republicans in 2020. Popular Democratic Governor Roy Cooper, who currently has a 74% approval rating on his handling of the coronavirus, is on the ballot and is favored to get reelected, while freshman Republican Senator Tom Tillis is currently trailing his Democratic challenger in the polls. Making matters worse, the other Republican senator, Richard Burr, currently has a 22% job approval rating following accusations that he sold off millions of dollars in stocks based on inside information prior to the outbreak of the coronavirus.

Demographic trends will continue to favor Democrats as the growth in North Carolina has come disproportionately from non-whites and college-educated voters. In 2016, 29% of the voters were non-white, while 50% of the turnout came from college graduates. The most recent public poll shows Biden leading Trump in the state by a margin of 50% to 45%.

Florida has supported every successful candidate for President since 1996. With its large senior population, the health and economic impact from COVID-19 will be the wildcard in determining the outcome of the election in the state.

While Texas and Georgia are also trending Democratic and are likely to complete the shift by the end of the decade, these states are unlikely to factor in the 2020 elections. If Biden were to carry either or both of these states, then he would win the election in a landslide.

### **Biden's Path to 270 Electoral College Votes**

Biden has multiple paths to get the 38 additional Electoral College votes necessary to get elected President. The most likely scenarios to get to 270 are:

- 1. Michigan, Pennsylvania, and Arizona:** Biden wins all three states – his best option, given the current political environment. By winning Michigan, Pennsylvania, and Arizona, he would be elected with 279 electoral votes. ([Map](#))
- 2. Michigan and Pennsylvania + 2 congressional districts (NE-02 and ME-02):** Biden wins Michigan and Pennsylvania, along with the second congressional districts in Nebraska and Maine (states that apportion votes based on congressional districts) to get to 270. ([MAP](#)) Nebraska's second congressional district is currently rated a tossup by Cook's Political Report. In 2018, Democrats picked up Maine's second congressional district, the governor's office, and took control of the state legislature. Cook currently has Maine's second congressional seat going to Trump.

3. **The Rust Belt:** Biden wins Michigan, Pennsylvania, and Wisconsin, giving him 278 electoral votes. ([MAP](#))
4. **Michigan and the Sunbelt:** Biden carries Michigan, Arizona, and North Carolina and ends up with 274 electoral votes. ([MAP](#))
5. **Florida +1:** Biden carries Florida, getting him to 261 electoral votes, and a win in any of the other battleground states would put him well past 270. ([MAP](#))

With these options in mind, the Biden campaign's best strategy to knock off Trump would be to:

1. Make putting Michigan out of reach for Trump the top priority
2. Lock up Pennsylvania
3. Prioritize winning Arizona, Maine 02 and Nebraska 02
4. Focus remaining resources on Wisconsin, North Carolina, and Florida

### **A New Era in American Politics**

In the coming days, the campaigns will shift their attention to the Electoral College map. Whereas in the past campaign activities were geared toward Election Day voting, increasingly states are opting for some form of early absentee ballot or mail-in voting. There are five states that have completely replaced Election Day voting with vote-by-mail. Additionally, there are 17 states that currently will allow absentee or early voting at least 25 days or more before Election Day; nine of these states begin the process 40 days or more out from November 3<sup>rd</sup>. This year, all six of the battleground states will offer no excuse early voting.

Given the threat of a second phase of COVID-19 in the fall, it is likely that the trend for early voting will be even more important this year as an increasing number of states will supplement Election Day voting with vote-by-mail. As more states choose this option, there will be greater pressure on campaigns to start making the tough choices on where to target their resources.

Since the 1992 presidential election, campaigns have largely been fought over the same political terrain. Now that the political realignment is complete, in no small part due to the Trump presidency, the 2020 elections will start a new era in presidential politics with an increasing number of states like Arizona and North Carolina becoming the political battlegrounds in American politics. The Biden campaign's strategy should focus on this new political map in our country rather than refighting the 2016 election.