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US Election Primer: Could We Know by Midnight?

Summary: 270 electoral college votes are needed to win the Presidency (out of a 538 total). Assuming there are no shockers in non-swing states (e.g.: Colorado, Minnesota, New Hampshire, New Mexico, Texas, Virginia, etc.), Harris and the Democrats would need 44 electoral college votes out of the 93 available in the seven swing states (discussed below). The easiest path for Harris and the Democrats would be winning Wisconsin, Michigan, and Pennsylvania. Meanwhile, Donald Trump and the Republicans need 51 more votes. The simplest path for Trump would be winning Georgia, North Carolina, and Pennsylvania. If this occurs, the Presidential election outcome could be known before midnight. We are acutely focused on Pennsylvania. Carrying the most votes among the swing states, Pennsylvania is known as the "tipping point" state because probabilistically it is the state most likely to win the election for either candidate. Second, polls close here at 8 PM EST, meaning that initial readings may be known here relatively early. But perhaps of greatest significance is that **the Northern swing states — Pennsylvania, Michigan, Wisconsin — generally vote together with only a few exceptions**. For example, they have voted for the same Presidential candidate in every election since 1992. So, candidates that win Pennsylvania tend to win the whole lot of northern swing states.

1) **Pennsylvania (19 electoral votes) is the tipping point state and the most important of the seven swing states!** Polls close here at 8 PM EST. This state will begin counting votes (including *early* votes) at 7 AM Tuesday, which is important because **1.8M votes have been cast as of this writing**. In 2020, Biden received 50.0% of votes versus 48.8% for Trump; in 2016 Trump received 48.2% of votes versus Clinton's 47.5%. In this election cycle, party registration data has been quite positive for the Republicans as they have substantially narrowed their state-wide party registration deficit. In March 2021, Democrats outnumbered Republicans by 630,000. October's data show that Republicans have cut this deficit to just 300,000.

Two bellwether counties to watch: **Erie County** is a swing county and has voted in line with the broader *state* in every election since 1992. Meanwhile, **Northampton County** has selected the *country's* Presidential election winner in every election since 1912 with exceptions in 1968, 2000, and 2004.

2) **North Carolina (16)** Polls close at 7:30 PM EST. This is largely a red-state and is likely to go for Donald Trump. If Harris wins North Carolina, it could be because damage from Hurricane Helene suppressed turnout in the largely Republican western portion of the state. North Carolina has voted Republican in every Presidential election since 1980 with 2008 being the lone exception (Obama narrowly won by around 14,000 votes). Almost 4.5M ballots have been cast here early.

Key County: Mecklenburg County, which includes the state's largest city (Charlotte).

3) **Georgia (16)** Polls close at 7:00 PM EST. The first results of the night will also be announced around this time in less competitive races/states. This state has historically been a Republican stronghold. Joe Biden, in 2020, became the first Democrat to win the state since Bill Clinton in

1992. However, many data points suggest that the state may swing back to Trump and the Republicans this cycle. As of the time of this writing, over 4M ballots have been cast already.

Key Counties: Cobb, Gwinnet, Fulton (home to Atlanta)

4) **Michigan (15):** Although Michigan has the fourth most electoral votes on this list, this is the second most competitive race in our estimation after Pennsylvania, because North Carolina and Georgia seem likely to vote for Donald Trump. Michigan has, in recent history, tended to vote for Democratic candidates because of their traditionally favorable attitudes/policies toward unions. This is important in manufacturing-oriented cities like Detroit and Flint. Donald Trump was able to win Michigan in 2016, becoming the first Republican to do so since 1988. Biden won Michigan in 2020 by roughly 154,000 votes (2.8%). Trump won in 2016 by nearly 11,000 votes (0.2%). So far, 3.2M ballots have been cast early. This state began counting mail-in ballots over a week ago, so results could be known quickly after closing. But these numbers cannot be *revealed* until after polls close at 8 PM EST.

Key counties: Wayne County (home to Detroit), competitive Kent County, and bellwether Saginaw County. Since 1992, every Presidential candidate to have won Saginaw County has won the state of Michigan too.

5) **Arizona (11)** Polls close at 9 PM EST. Although now a competitive state, Arizona used to be a Republican stronghold. Arizona has voted for the Republican candidate in every Presidential election from 2000 - 2016. President Biden (Democratic) won this state in 2020 by under 11,000 votes (0.3%). Trump won by roughly 91,000 votes (3.5%) in 2016. Almost 2.1M votes have been cast here so far.

Key County: Maricopa County — home to Phoenix, the country's fifth most populous city.

6) **Wisconsin (10)** Polls close at 9 PM EST. Wisconsin is famous for being a notoriously difficult state to poll accurately and misses have been exceptionally large here in the last two Presidential election cycles. Polls undercounted Trump substantially in 2016 and 2020. The final polls in the immediate runup to the 2016 election had Hillary Clinton with the 6.2% advantage. Yet, Trump ended up ***winning*** by less than 23,000 votes (0.8%) in 2016. In 2020, the final polls had Biden with a 7.6% advantage. Yet, Biden ended up winning by only around 20,000 votes (0.6%) in 2020. **If polling errors of these magnitudes continue in this election, Trump is likely to win substantially considering that as of writing, polls have Harris with just a 1% lead.** 1.5M votes have been cast early in Wisconsin.

Key counties: Dane County (Madison), Waukesha, Milwaukee, Door County (which has backed the winning Presidential candidate in every cycle since 2000).

7) **Nevada (6)** Polls close at 10 PM EST. This state has the least electoral college votes of the swing states. This state has voted for the Democratic Presidential candidate in every election since 2008. However, Nevada's job market slowdown is the most pronounced of the swing states. In 2016, Clinton (D) received 47.9% of votes compared to Trump's (R) 45.5%. This state has been close in the last two elections having been decided by around ~27,000 votes in 2016 and ~34,000 votes in 2020. Biden received 50.1% of votes compared to Trump's 47.7% in 2020. Approximately 1.1M votes have been cast so far in Nevada.

Key county: Clark County (home to Las Vegas).

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