# AUSTRALIAN BRAND SCIENTISTS RELEASE NEW US VOTER ENERGY STUDY

**Political Brand Institute forecasts a Democratic Senate majority, citing significantly stronger voter energy and greater Republican brand damage.**

Sydney, 30 October 2026

Australian researchers at the Political Brand Institute (PBI) are forecasting a major Democratic victory in the 3 November US midterm elections, including control of the Senate, using a new measure of Political Brand Energy™ alongside research into party personality and rejection.

PBI, an initiative of Australian brand strategy group House of Brand Group, surveyed 5,027 registered American voters in September. The study measures not only the direction of political preferences, but their intensity and the emotional associations voters hold about each party.

**Three findings underpin PBI's interpretation of the election environment:**

- **Women score 25%** more Political Brand Energy towards Democrats than Republicans.
- **Gen Z scores a huge 56%** more Political Brand Energy towards Democrats than Republicans.
- **27.2%** of US voters say they would **definitely never vote Republican in future elections**, compared with 19.7% who say the same about Democrats.

"Polls tell you which way America leans. They don't tell you how hard," said PBI founder and Australian brand strategist Peter Drinkwater. "Our Political Brand Energy scores reveal the difference between the intensity of approval and disapproval, a dimension of voter sentiment that conventional polling may not fully capture."

PBI forecasts a clear Democratic victory across the House and Senate. That forecast is an interpretation of national research findings into he emotion of the electorate, not a state-by-state seat projection.

## Measuring the voter energy polls do not capture

PBI's Political Brand Energy™ measure combines the direction of a voter's political lean with the intensity of that preference. Two voters may express the same party preference while feeling very different levels of conviction. PBI believes that intensity can provide additional insight into potential mobilisation and turnout.

The study also finds that men who voted for Donald Trump in 2024 show greater current openness towards Democrats than women who voted for Trump, particularly among Gen X and Gen Z men. This is a comparison of reported past vote and present attitudes, not a longitudinal measure of individual switching.

"Just as the polls underestimated the pull of Trump's brand in previous presidential elections, we believe they may now be underestimating how strongly the Republican brand is motivating opposition," Drinkwater said.

## Honesty and freedom from corruption outranks cost of living in voters' ideal political party

While cost of living dominates much election discussion, honesty and freedom from corruption ranked first when respondents described the qualities they want in an ideal political party. Abiding by the Constitution ranked second, protecting democracy third and addressing the cost of living fourth.

Neither major party performed strongly against expectations of honesty and trustworthiness. "When we examine the deeper qualities Americans want from their political leaders, honesty and integrity come first. Neither party is delivering what voters ideally want," Drinkwater said.

## The personalities behind America's political divide

In spontaneous descriptions, respondents associated the Democratic Party with **caring and honest**, and the Republican Party with **selfish, greedy and corrupt**. PBI also identifies contrasting brand archetypes, with Democrats occupying a more maternal role and Republicans a more paternal role. Democratic voters strongly associate the Republican Party with Donald Trump. Republican voters more readily describe their party through conservative values, lower taxes, America First and economic strength before mentioning Trump.

"People do not simply vote for policies. Political choices are also tied to identity, values and how people see themselves," Drinkwater said.

## Widespread distrust of political institutions

- 80% do not trust political party advertising.
- 69% do not trust Congress.
- 67% do not trust the federal government.
- 62% do not trust political polls.

"Our data is not a replacement for polling. It is the missing emotional layer," Drinkwater said.

## A new discipline of Political Brand Science™, applied first to USA followed by Australia

PBI applies commercial brand tracking methods to political parties, examining personality, emotion, functional performance, energy, consideration and rejection. Established by House of Brand Group, which has 15 years of brand strategy and research experience of running brand health tracking for many of Australia and the world's best brands, PBI plans quarterly US tracking, an Australian tracker in 2027 and a UK tracker thereafter. PBI has no affiliation with any political party or candidate.

All profits from PBI support the Rebecca Rebuild Institute, which helps people rebuild their health following treatment for serious illness.

## Watch the research and access media assets

Peter Drinkwater presents the findings in Beyond Polling: The Health of the US Political Party Brands. A preview teaser attracted almost 300,000 views in less than five days.

Research films (33 min and feature film length cuts): youtube.com/@polbrandusa

Media materials and research graphics: politicalbrandinstitute.com/media

## Research methodology

PBI surveyed 5,027 US adults who reported being registered to vote from 4 to 15 September 2026 using an online panel provided by US-based Full Circle Research. Results were weighted by age, gender, region, education, race and recalled 2024 presidential vote using Pew Research Center benchmarks. They were not weighted to current party identification or voting intention, allowing current political preferences to emerge from the weighted sample rather than being calibrated to predetermined party-support proportions.
The research is designed for national analysis, not individual state-level estimates. Political Brand Energy is intended to complement traditional polling by measuring sentiment intensity and potential mobilisation, rather than directly measuring turnout.
Full methodology: politicalbrandinstitute.com/methodology

## About Peter Drinkwater and media enquiries

Peter Drinkwater is an Australian brand strategist, author and founder of House of Brand Group and the Political Brand Institute, with extensive experience in brand research and strategy working with Australia and the world's best brands. He is available for interviews with Australian television, radio, print and digital media.

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