

A GLOBAL VIEW OF THE 2020 U.S. PRESIDENTIAL ELECTION

- ★ Biden vs. Trump: How the world would vote
- ★ Who the world expects will win
- ★ Perceived threats to the U.S. election and to own country's next major election

For more information about this survey, go to: <https://www.ipsos.com/en/global-views-us-presidential-election>

October 2020

GAME CHANGERS



KEY FINDINGS: BIDEN VS. TRUMP

When asked who they would vote for in the 2020 U.S. presidential election, a greater proportion of adults surveyed in most of 24 countries, not including the United States, say they would vote for Democrat candidate Joe Biden over Republican candidate Donald Trump

- Biden leads Trump by 50 percentage points or more in six countries and by 30 to 49 points in 10 other countries
- Only in Poland and Russia does support for Trump equal or outweigh that for Biden
- Biden is preferred by as many as 73% of those surveyed in Sweden and by only 13% in Russia
- Trump is preferred by as many as 34% of those surveyed in India and by only 7% in Mexico
- Averaging the results for all 24 countries surveyed, Biden leads Trump by 31 points, 48% to 17%
- A similar Ipsos poll conducted before the 2016 presidential election also found citizens across the world generally preferred Democrat candidate Hillary Clinton to Trump: on average, 58% of people across 22 countries not including the U.S. would have voted for Clinton, compared to 12% for Trump

When it comes to who people outside the U.S. expect to win the election, regardless of their preference, 39% across all 24 countries believe Biden will win and 27% think Trump will.

- Biden is most widely expected to win in Mexico (51%) and South Korea (50%); Trump is in Poland (41%), Russia (36%), and India (35%)
- Ahead of the 2016 election, 68% of citizens from 23 countries not including the U.S. expected Clinton to win while only 15% were betting on Trump

KEY FINDINGS: THREATS TO THE INTEGRITY OF U.S. AND OWN COUNTRY'S ELECTIONS

Looking at the integrity of the upcoming U.S. presidential election, Americans are more likely than people living in other countries to believe this event could be impacted by four factors:

- The spreading of fake news (cited as a serious risk by 45% of Americans vs. 35% of people in 24 other countries)
- Efforts to misrecord, misuse, or destroy valid votes (36% vs. 19%)
- Voter fraud (35% vs. 22%)
- Efforts to prevent people from voting (34% vs. 20%)

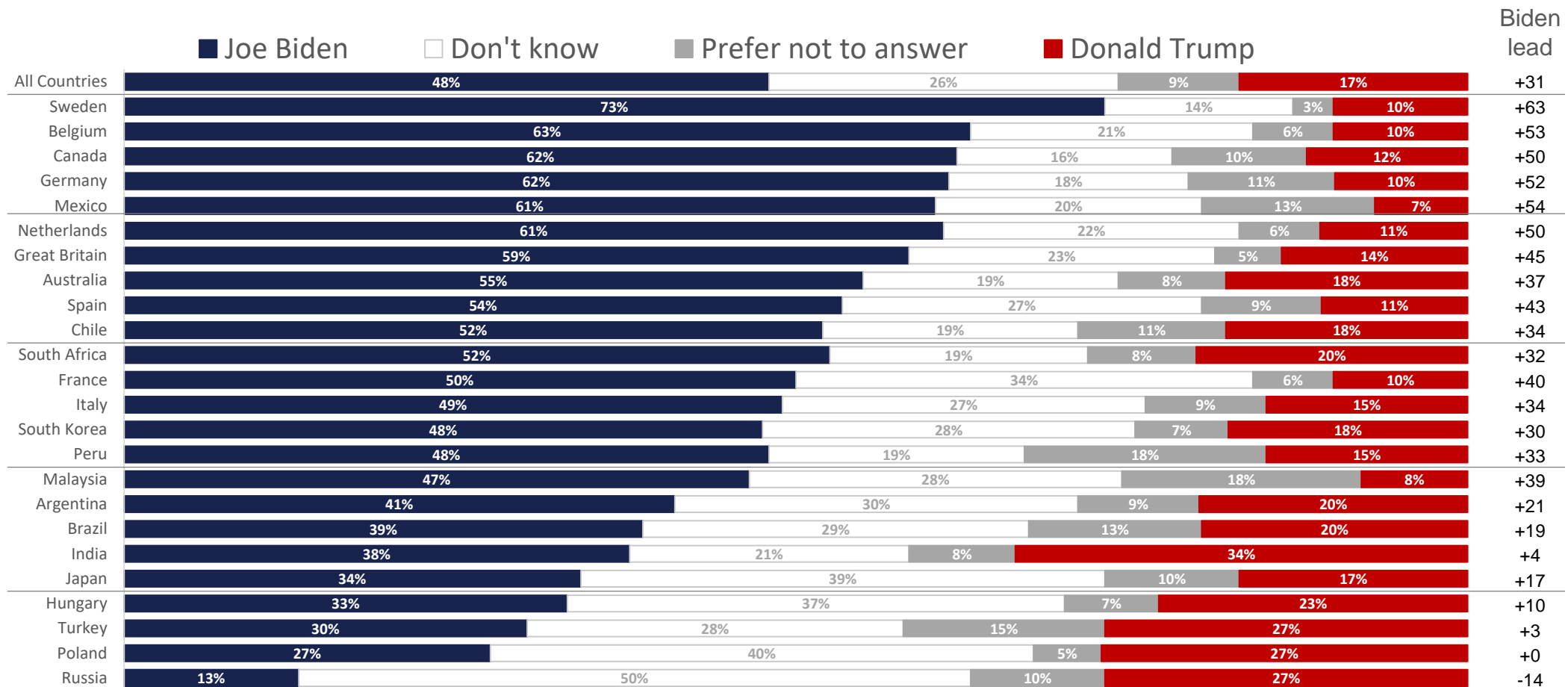
On average, people across the world are more likely to think the upcoming U.S. election is exposed to several specific risks than is the next major election in their country:

- The spreading of fake news (globally cited by 35% as a serious risk in the U.S. vs. 28% as a risk in their country)
- Efforts to prevent people from voting (20% vs. 15%)
- Interference from a foreign power (16% vs. 12%)

Concerns about the integrity of the next major election in one's own country being at risk vary widely

- About one third or more in the Netherlands, Germany, Australia, Japan, Canada, Belgium, and France do not think any of these risks could seriously impact the results of their country's next major election
- No more than 10% in Mexico, South Africa, Brazil, Hungary, Argentina, India, Malaysia, Peru, Turkey, the U.S., and Russia do

WOULD YOU VOTE FOR...



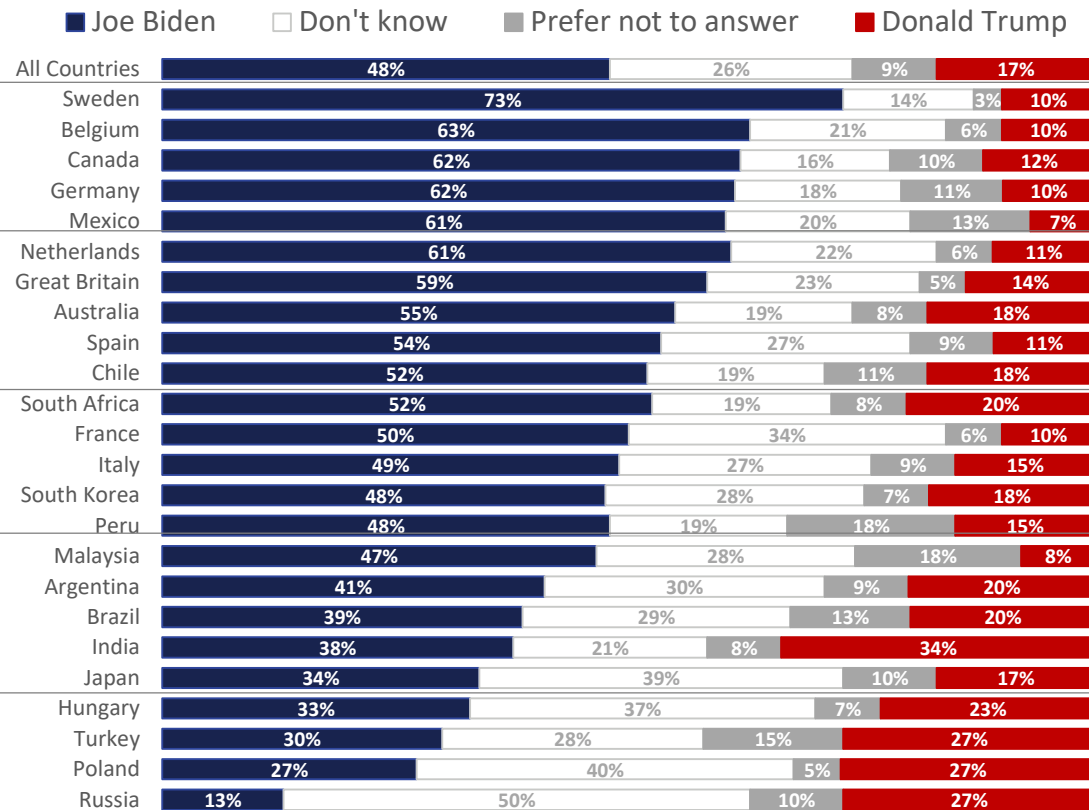
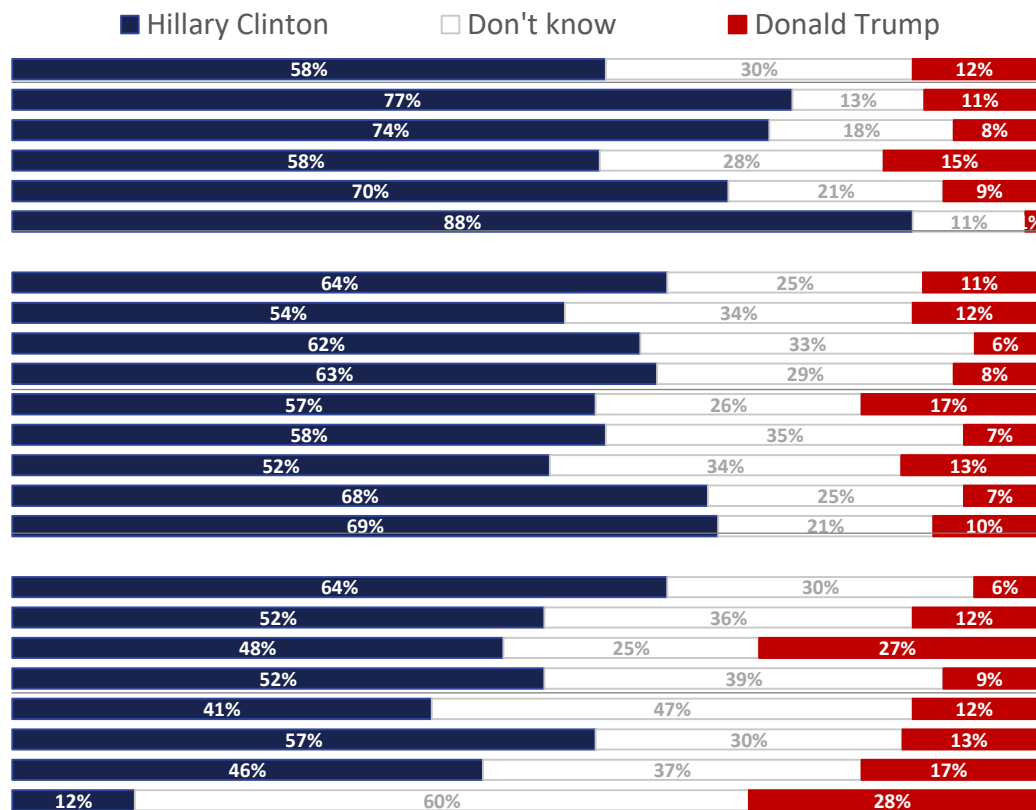
Q1. The United States will be holding an election this November to elect a President for the next four years. If you had to vote in this election, would you vote for (ROTATE) Republican candidate Donald Trump, or Democrat candidate Joe Biden?

Base: 17,507 online adults aged 16-74 or 18-74 across 24 countries, Sept-Oct 2020

WOULD YOU VOTE FOR...

2016

2020



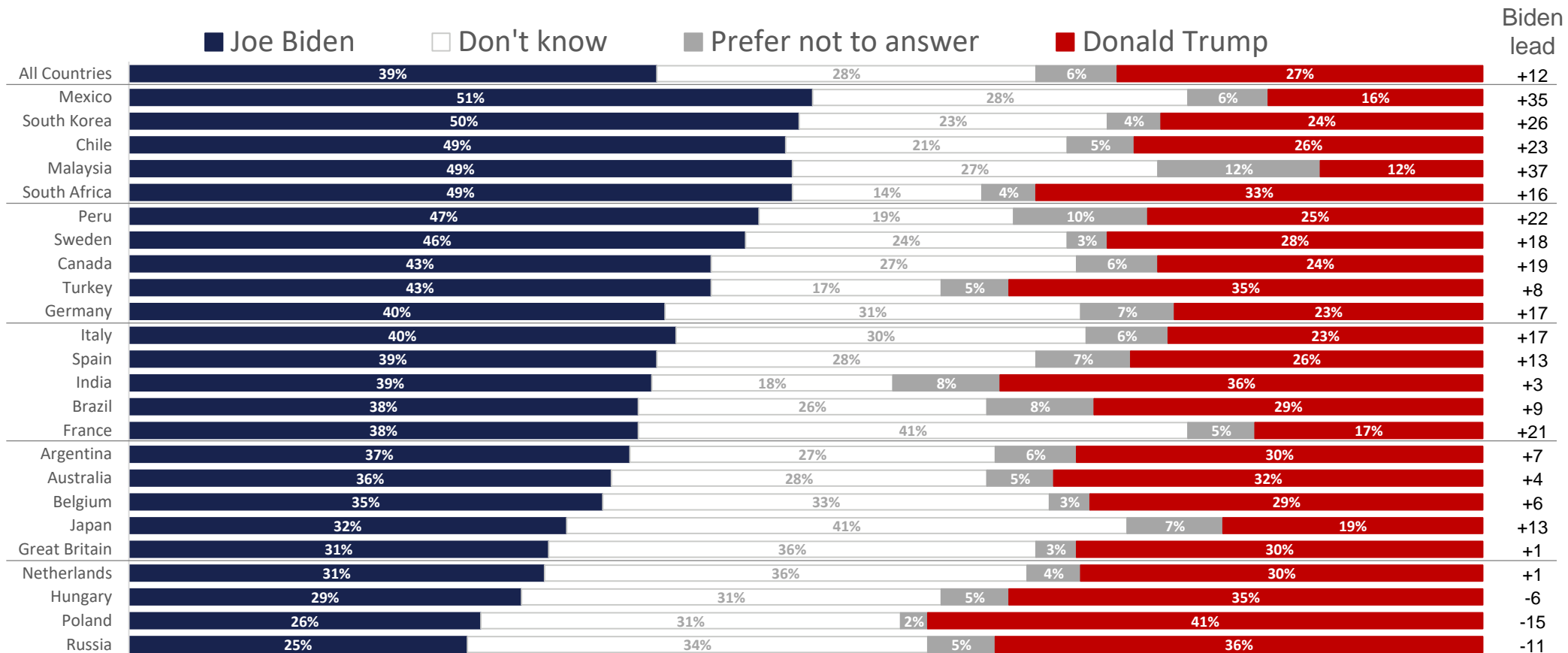
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Base 2020: 17,507 online adults aged 16-74 or 18-74 across 24 countries, Sept.-Oct. 2020

Base 2016: 11,000 online adults aged 16-64 or 18-64 across 22 countries, May-June 2016



WHICH DO YOU BELIEVE WILL BE ELECTED AS PRESIDENT?



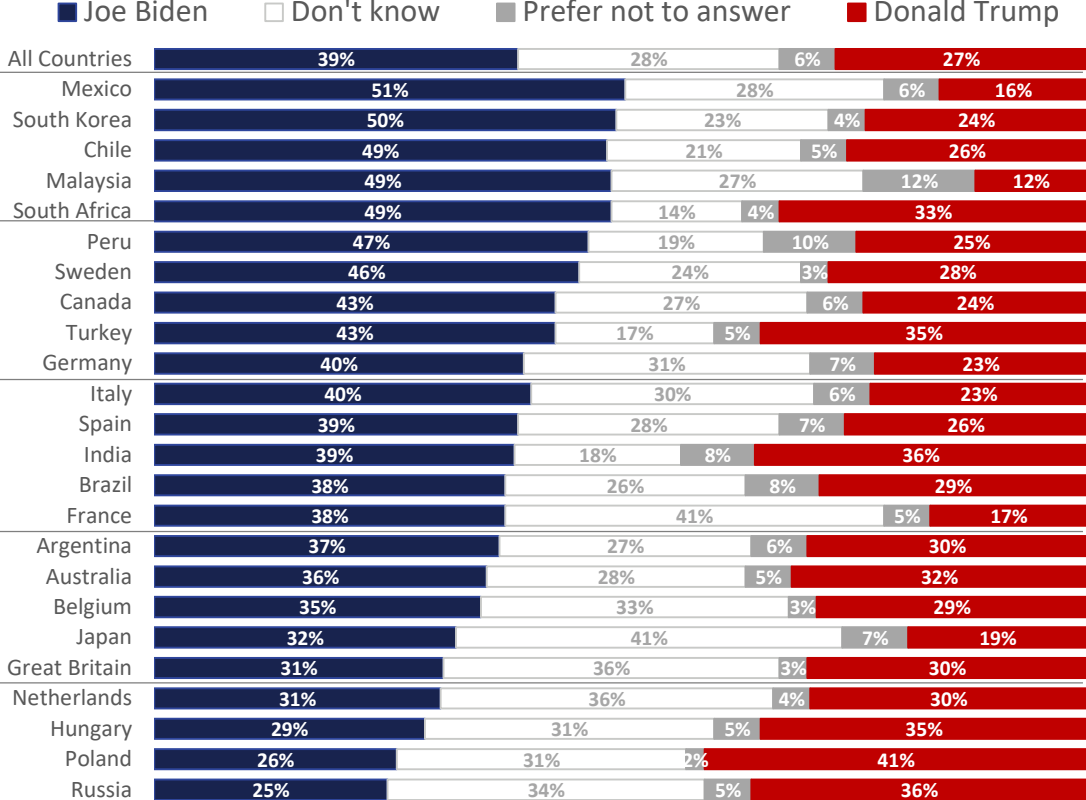
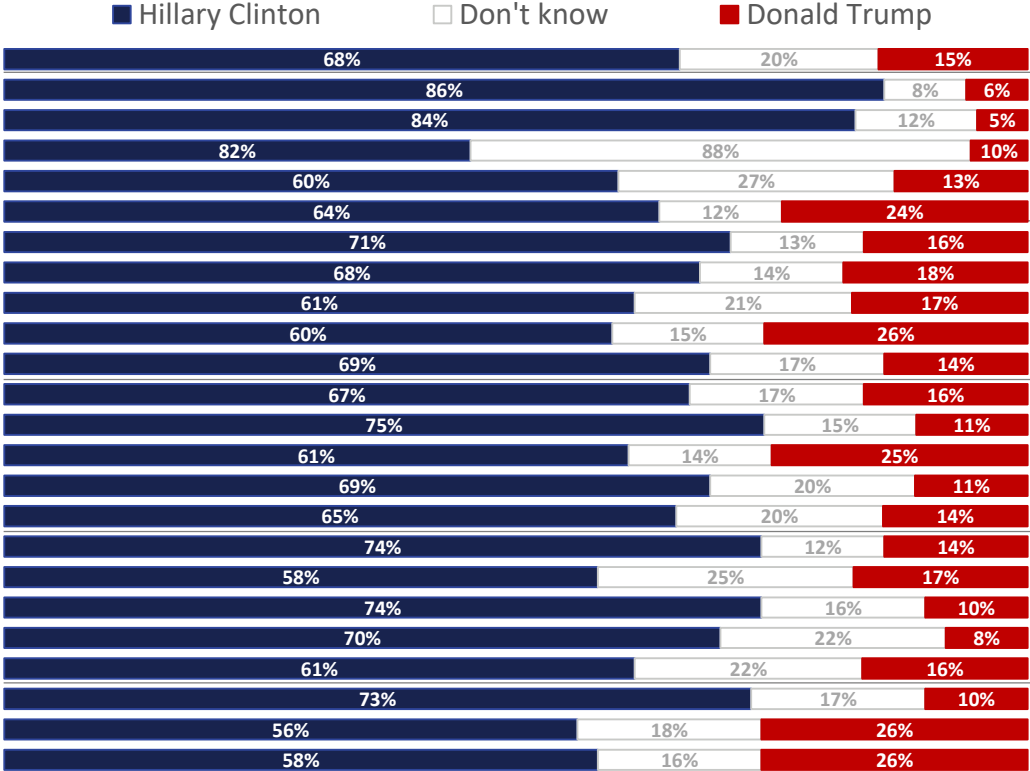
Q2. Regardless of who you would vote for in the U.S. Presidential election, which of Donald Trump or Joe Biden do you believe will be elected as president?

Base: 17,507 online adults aged 16-74 or 18-74 across 24 countries, Sept-Oct 2020

WHICH DO YOU BELIEVE WILL BE ELECTED AS PRESIDENT?

2016

2020

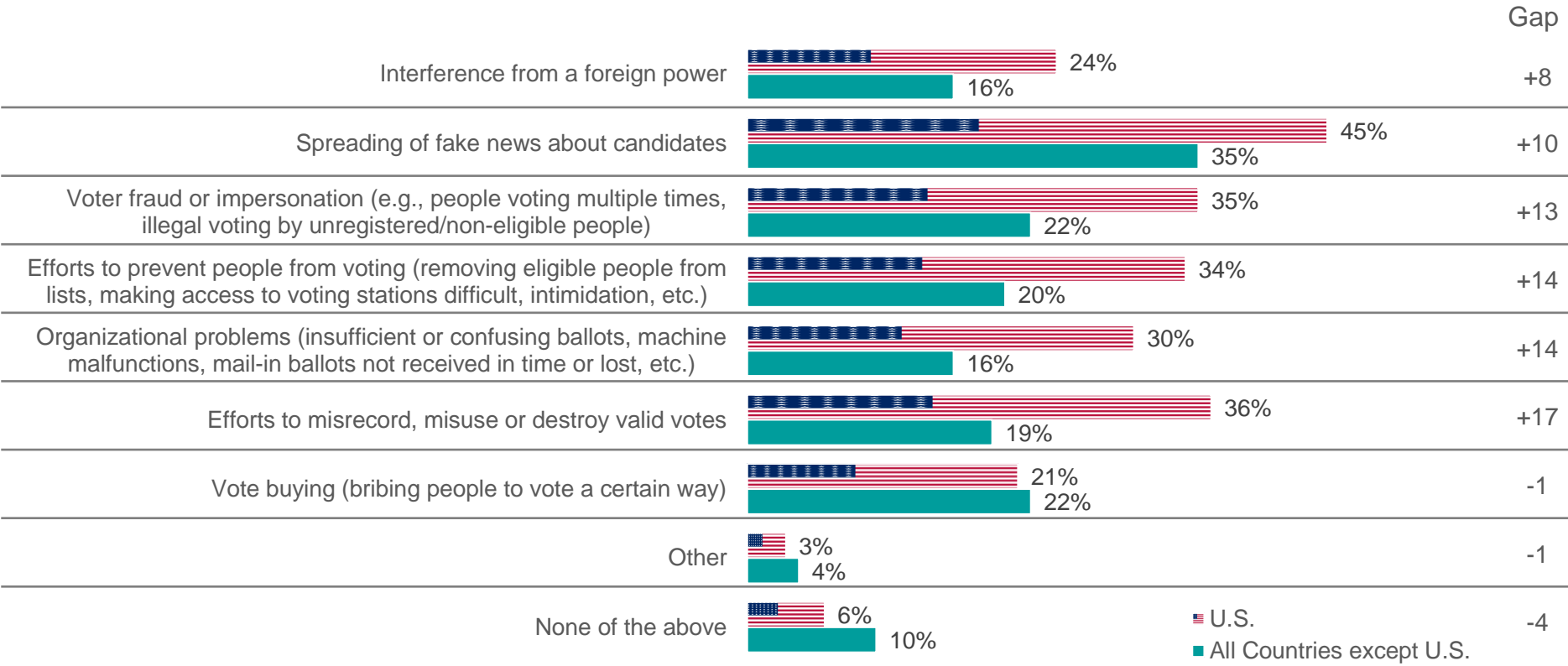


Q2. Regardless of who you would vote for in the U.S. Presidential election, which of Donald Trump or Joe Biden do you believe will be elected as president?

Base 2020: 17,507 online adults aged 16-74 or 18-74 across 24 countries, Sept-Oct 2020
 Base 2016: 16,629 online adults aged 16-64 or 18-64 across 23 countries, Sept-Oct 2016



SERIOUS RISKS IN THE U.S. PRESIDENTIAL ELECTION THIS YEAR AS PERCEIVED IN THE U.S. AND IN THE REST OF THE WORLD

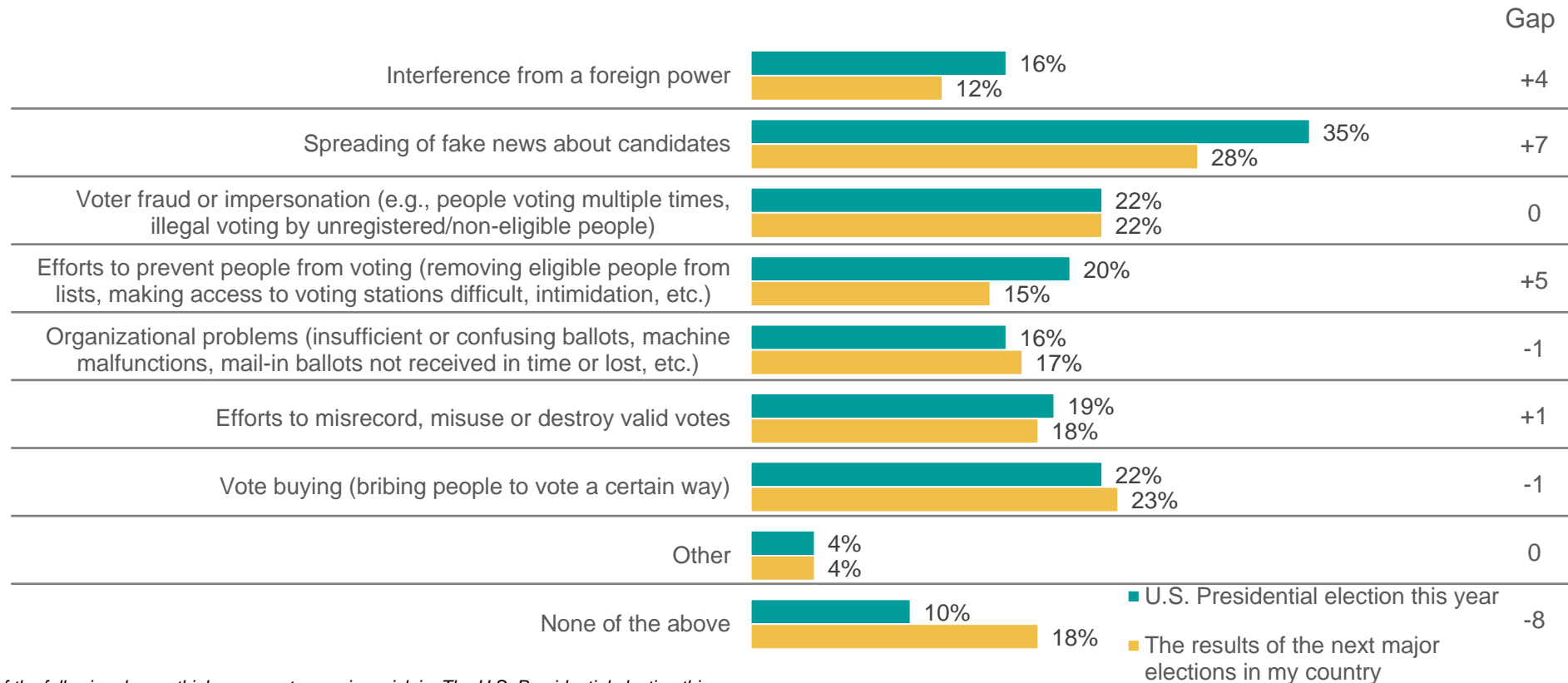


Q3a. Which of the following do you think represents a serious risk in: The U.S. Presidential election this year

Base: 1,000 online adults aged 18-74 in the U.S. and 17,507 online adults aged 16-74 or 18-74 across 24 other countries, Sept-Oct 2020



SERIOUS RISKS IN THE U.S. PRESIDENTIAL ELECTION THIS YEAR VS. IN OWN COUNTRY'S NEXT MAJOR ELECTION (AVERAGE FOR ALL COUNTRIES EXCLUDING THE U.S.)



Q3a. Which of the following do you think represents a serious risk in: The U.S. Presidential election this year

Q3b. Which of the following do you think represents a serious risk in: The results of the next major elections in [COUNTRY]

Base: 17,507 online adults aged 16-74 or 18-74 across 24 countries (not including the U.S.), Sept-Oct 2020

SERIOUS RISK FOR THE U.S. PRESIDENTIAL ELECTION THIS YEAR

| | All countries except U.S. | Argentina | Australia | Belgium | Brazil | Canada | Chile | France | Germany | Great Britain | Hungary | India | Italy | Japan | Malaysia | Mexico | Netherlands | Peru | Poland | Russia | South Africa | South Korea | Spain | Sweden | Turkey | United States |
|---|---------------------------|-----------|-----------|---------|--------|--------|-------|--------|---------|---------------|---------|-------|-------|-------|----------|--------|-------------|------|--------|--------|--------------|-------------|-------|--------|--------|---------------|
| Interference from a foreign power | 16% | 9% | 23% | 17% | 12% | 21% | 8% | 14% | 12% | 24% | 18% | 20% | 10% | 14% | 22% | 15% | 12% | 9% | 10% | 8% | 19% | 17% | 12% | 26% | 27% | 24% |
| Spreading of fake news about candidates | 35% | 26% | 41% | 41% | 38% | 37% | 30% | 32% | 37% | 44% | 33% | 28% | 32% | 34% | 28% | 26% | 46% | 24% | 36% | 34% | 39% | 44% | 30% | 50% | 30% | 45% |
| Voter fraud or impersonation | 22% | 23% | 24% | 25% | 20% | 20% | 24% | 29% | 28% | 18% | 20% | 23% | 16% | 15% | 26% | 24% | 25% | 27% | 19% | 26% | 28% | 15% | 25% | 16% | 23% | 35% |
| Efforts to prevent people from voting | 20% | 14% | 32% | 22% | 14% | 33% | 18% | 19% | 21% | 28% | 13% | 27% | 14% | 10% | 23% | 19% | 24% | 16% | 13% | 12% | 27% | 15% | 20% | 25% | 26% | 34% |
| Organizational problems | 16% | 10% | 20% | 18% | 15% | 24% | 14% | 18% | 20% | 19% | 10% | 25% | 8% | 12% | 18% | 13% | 23% | 10% | 13% | 13% | 19% | 21% | 13% | 18% | 17% | 30% |
| Efforts to misrecord, misuse or destroy valid votes | 19% | 13% | 24% | 22% | 14% | 25% | 17% | 15% | 27% | 21% | 16% | 19% | 11% | 8% | 20% | 11% | 24% | 16% | 16% | 17% | 23% | 12% | 13% | 31% | 33% | 36% |
| Vote buying | 22% | 20% | 22% | 24% | 13% | 21% | 21% | 20% | 20% | 17% | 22% | 22% | 23% | 15% | 29% | 23% | 25% | 25% | 20% | 26% | 32% | 14% | 26% | 23% | 25% | 21% |
| None of the above | 10% | 8% | 11% | 9% | 8% | 7% | 6% | 15% | 11% | 10% | 7% | 8% | 13% | 20% | 10% | 4% | 12% | 6% | 15% | 13% | 5% | 14% | 8% | 5% | 5% | 6% |
| Prefer not to answer | 13% | 20% | 10% | 10% | 17% | 15% | 15% | 12% | 13% | 11% | 14% | 14% | 14% | 13% | 18% | 14% | 13% | 14% | 13% | 14% | 11% | 5% | 17% | 7% | 13% | 6% |

Q3. Which of the following do you think represents a serious risk in: The U.S. Presidential election this year

Base: 1,000 online adults aged 18-74 in the U.S. and 17,507 online adults aged 16-74 or 18-74 across 24 other countries, Sept-Oct 2020

SERIOUS RISK FOR RESULTS OF THE NEXT MAJOR ELECTIONS IN OWN COUNTRY

| | All countries except U.S. | Argentina | Australia | Belgium | Brazil | Canada | Chile | France | Germany | Great Britain | Hungary | India | Italy | Japan | Malaysia | Mexico | Netherlands | Peru | Poland | Russia | South Africa | South Korea | Spain | Sweden | Turkey | United States |
|---|---------------------------|-----------|-----------|---------|--------|--------|-------|--------|---------|---------------|---------|-------|-------|-------|----------|--------|-------------|------|--------|--------|--------------|-------------|-------|--------|--------|---------------|
| Interference from a foreign power | 12% | 8% | 14% | 7% | 11% | 10% | 12% | 11% | 9% | 21% | 13% | 11% | 6% | 7% | 13% | 10% | 8% | 9% | 7% | 14% | 15% | 11% | 9% | 26% | 25% | 24% |
| Spreading of fake news about candidates | 28% | 27% | 28% | 20% | 41% | 24% | 27% | 25% | 15% | 34% | 29% | 29% | 27% | 17% | 33% | 18% | 21% | 26% | 32% | 22% | 28% | 41% | 33% | 32% | 32% | 45% |
| Voter fraud or impersonation | 22% | 35% | 9% | 10% | 23% | 9% | 19% | 15% | 11% | 13% | 39% | 30% | 13% | 8% | 33% | 34% | 7% | 25% | 30% | 45% | 45% | 11% | 17% | 8% | 36% | 35% |
| Efforts to prevent people from voting | 15% | 14% | 8% | 5% | 13% | 8% | 26% | 8% | 6% | 11% | 16% | 27% | 11% | 7% | 25% | 19% | 3% | 12% | 22% | 18% | 29% | 9% | 16% | 8% | 30% | 34% |
| Organizational problems | 17% | 18% | 14% | 19% | 15% | 15% | 18% | 13% | 10% | 11% | 12% | 28% | 12% | 10% | 21% | 19% | 15% | 15% | 23% | 17% | 28% | 20% | 16% | 17% | 23% | 30% |
| Efforts to misrecord, misuse or destroy valid votes | 18% | 20% | 7% | 10% | 13% | 7% | 16% | 7% | 9% | 8% | 26% | 21% | 13% | 7% | 27% | 25% | 7% | 24% | 31% | 33% | 35% | 13% | 13% | 15% | 42% | 36% |
| Vote buying (bribing people to vote a certain way) | 23% | 36% | 11% | 11% | 28% | 10% | 20% | 10% | 8% | 7% | 41% | 32% | 26% | 17% | 37% | 43% | 8% | 33% | 21% | 31% | 41% | 12% | 18% | 14% | 31% | 21% |
| None of the above | 18% | 6% | 35% | 31% | 4% | 32% | 11% | 30% | 38% | 27% | 4% | 6% | 16% | 35% | 6% | 2% | 43% | 6% | 11% | 10% | 3% | 17% | 15% | 29% | 6% | 6% |
| Prefer not to answer | 10% | 11% | 8% | 11% | 14% | 14% | 10% | 11% | 14% | 9% | 11% | 10% | 13% | 13% | 13% | 8% | 11% | 10% | 7% | 8% | 5% | 5% | 14% | 7% | 8% | 6% |

Q3b. Which of the following do you think represents a serious risk in: The results of the next major elections in [COUNTRY]

Base: 1,000 online adults aged 18-74 in the U.S. and 17,507 online adults aged 16-74 or 18-74 across 24 other countries, Sept-Oct 2020

DIFFERENCE IN PERCEIVED RISK: U.S. PRESIDENTIAL ELECTION THIS YEAR VS. NEXT MAJOR ELECTIONS IN OWN COUNTRY

| | All countries except U.S. | Argentina | Australia | Belgium | Brazil | Canada | Chile | France | Germany | Great Britain | Hungary | India | Italy | Japan | Malaysia | Mexico | Netherlands | Peru | Poland | Russia | South Africa | South Korea | Spain | Sweden | Turkey |
|---|---------------------------|-----------|-----------|---------|--------|--------|-------|--------|---------|---------------|---------|-------|-------|-------|----------|--------|-------------|------|--------|--------|--------------|-------------|-------|--------|--------|
| Interference from a foreign power | +4 | +1 | +9 | +10 | +1 | +11 | -4 | +3 | +3 | +3 | +5 | +9 | +4 | +7 | +9 | +5 | +4 | 0 | +3 | -6 | +4 | +6 | +3 | 0 | +2 |
| Spreading of fake news about candidates | +7 | -1 | +13 | +21 | -3 | +13 | +3 | +7 | +22 | +10 | +4 | -1 | +5 | +17 | -5 | +8 | +25 | -2 | +4 | +12 | +11 | +3 | -3 | +18 | -2 |
| Voter fraud or impersonation | 0 | -12 | +15 | +15 | -3 | +11 | +5 | +14 | +17 | +5 | -19 | -7 | +3 | +7 | -7 | -10 | +18 | +2 | -11 | -19 | -17 | +4 | +8 | +8 | -13 |
| Efforts to prevent people from voting | +5 | 0 | +24 | +17 | +1 | +25 | -8 | +11 | +15 | +17 | -3 | 0 | +3 | +3 | -2 | 0 | +21 | +4 | -9 | -6 | -2 | +6 | +4 | +17 | -4 |
| Organizational problems | -1 | -8 | +6 | -1 | 0 | +9 | -4 | +5 | +10 | +8 | -2 | -3 | -4 | +2 | -3 | -6 | +8 | -5 | -10 | -4 | -9 | +1 | -3 | +1 | -6 |
| Efforts to misrecord, misuse or destroy valid votes | 1 | -7 | +17 | +12 | +1 | +18 | +1 | +8 | +18 | +13 | -10 | -2 | -2 | +1 | -7 | -14 | +17 | -8 | -15 | -16 | -12 | -1 | 0 | +16 | -9 |
| Vote buying (bribing people to vote a certain way) | -1 | -16 | +11 | +13 | -15 | +11 | +1 | +10 | +12 | +10 | -19 | -10 | -3 | -2 | -8 | -20 | +17 | -8 | -1 | -5 | -9 | +2 | +8 | +9 | -6 |
| None of the above | -8 | +2 | -24 | -22 | +4 | -25 | -5 | -15 | -27 | -17 | +3 | +2 | -3 | -15 | +4 | +2 | -31 | 0 | +4 | +3 | +2 | -3 | -7 | -24 | -1 |
| Prefer not to answer | +3 | +9 | +2 | -1 | +3 | +1 | +5 | +1 | -1 | +2 | +3 | +4 | +1 | 0 | +5 | +6 | +2 | +4 | +6 | +6 | +6 | 0 | +3 | 0 | +5 |

Q3a. Which of the following do you think represents a serious risk in: The U.S. Presidential election this year

Q3b. Which of the following do you think represents a serious risk in: The results of the next major elections in [COUNTRY]

Base: 17,507 online adults aged 16-74 or 18-74 across 24 countries (not including the U.S.), Sept-Oct 2020

METHODOLOGY

The findings in this report come from a 25-country Global Advisor survey conducted on Ipsos's Online Panel System, September 25-October 9, 2020 among 18,507 adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey and 16-74 in all other countries.

The sample consists of approximately 1000+ individuals in each of Australia, Belgium, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Mexico, Spain, Sweden, and the U.S., and approximately 500+ individuals in each of Argentina, Chile, Hungary, India, Malaysia, the Netherlands, Peru, Poland, Russia, South Africa, South Korea, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the U.S. can be taken as representative of these countries' general adult population under the age of 75.

The samples in Brazil, Chile, India, Malaysia, Mexico, Peru, Russia, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more "connected" segment of these population.

This report includes comparisons with the results of surveys conducted on Global Advisor in May-June 2016 and September-October 2016 in most of the same countries as in the 2020 survey with comparable sample sizes.

The data is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 4.8 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of don't knows or not stated responses.

The publication of these findings abides by local rules and regulations.

ABOUT IPSOS

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Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

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At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.

