Welcome to our webinar!

Today's presenters: Helping you to understand the complex factors of American life that will impact the 2020 presidential election

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Chris Jackson is a Senior Vice President and lead for the Ipsos Public Polling practice in the United States. His research specialties include public opinion trends, election polling, strategic communications research and reputation research. He works with a wide variety of public and private sector clients including our media partners including Thomson Reuters, USA Today, and ABC News, and he is a spokesperson for Ipsos Public Affairs in the US.

Chris is an expert on American electoral and public polling with a deep background in the American political system. Beyond politics, Chris has worked across a wide range of research subjects – including technology, healthcare, policy, energy and consumer issues – and mastered a wide range of research techniques– including multiple survey methodologies, focus group moderating, in-depth interviewing, etc.

Chris has been a commentator in major news outlets in the United States and abroad, including USA Today, Reuters, BuzzFeed, BBC, Sky News, and CBS, as well as original commentary from Ipsos.

Chris earned his BA from the University of Southern Mississippi and did his graduate work at the University of Georgia (MA) where he specialized in American elections.

ELECTION 2020 INSIDE TRACK

June 25, 2020

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AGENDA

1. IMPACT OF CORONAVIRUS

2. BLACK LIVES MATTER DEMONSTRATIONS

3. PERCEPTIONS OF DONALD TRUMP

4. NOVEMBER ELECTION

5. QUESTIONS

Coronavirus, the economy, and racism are top issues

In your opinion, what is the most important problem facing the U.S. today?

Legend:
- Healthcare (dark red)
- Economy generally (dark blue)
- Immigration (green)
- Unemployment/jobs (light blue)

	January 2012	December 2019	March 2020	May 2020	June 2020
Healthcare	6%	18%	28%	20%	16%
Economy + Jobs	65%	16%	20%	35%	29%
Immigration	3%	15%	9%	7%	5%
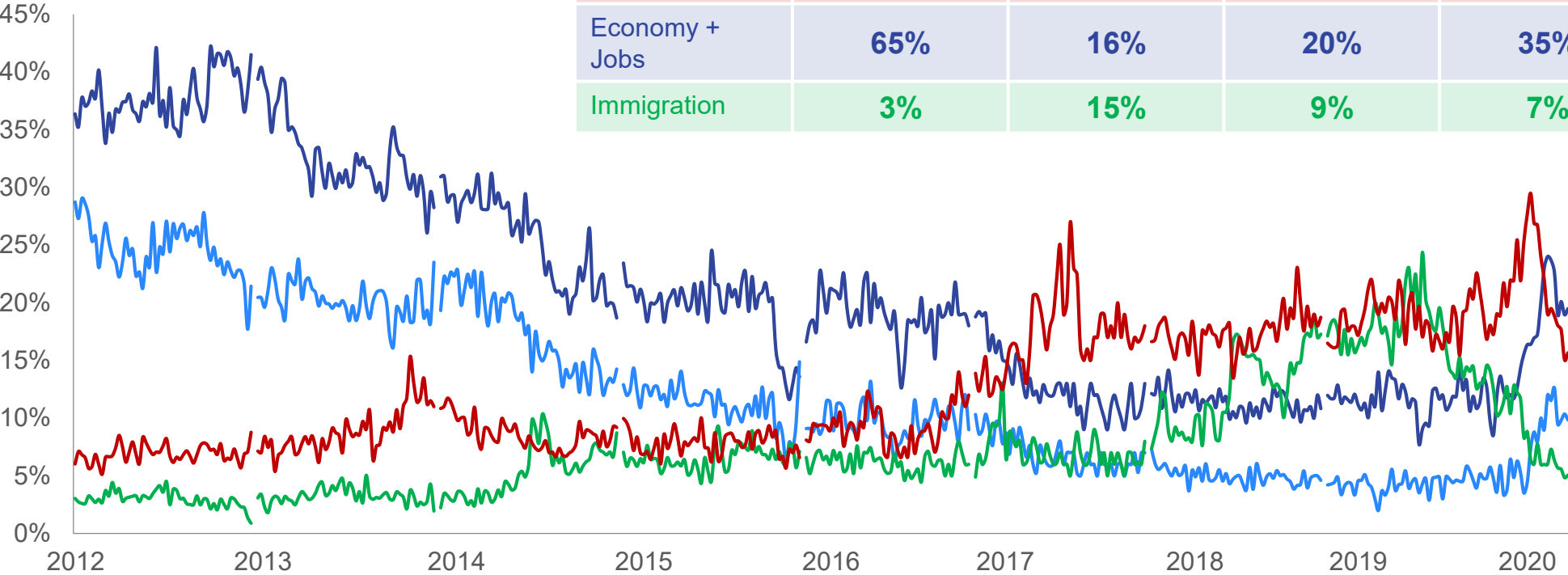
1 in 10 have been volunteering "racism" and "police brutality"

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Consumer perceptions not in line with economic reality

American consumer confidence and unemployment 2002-2020
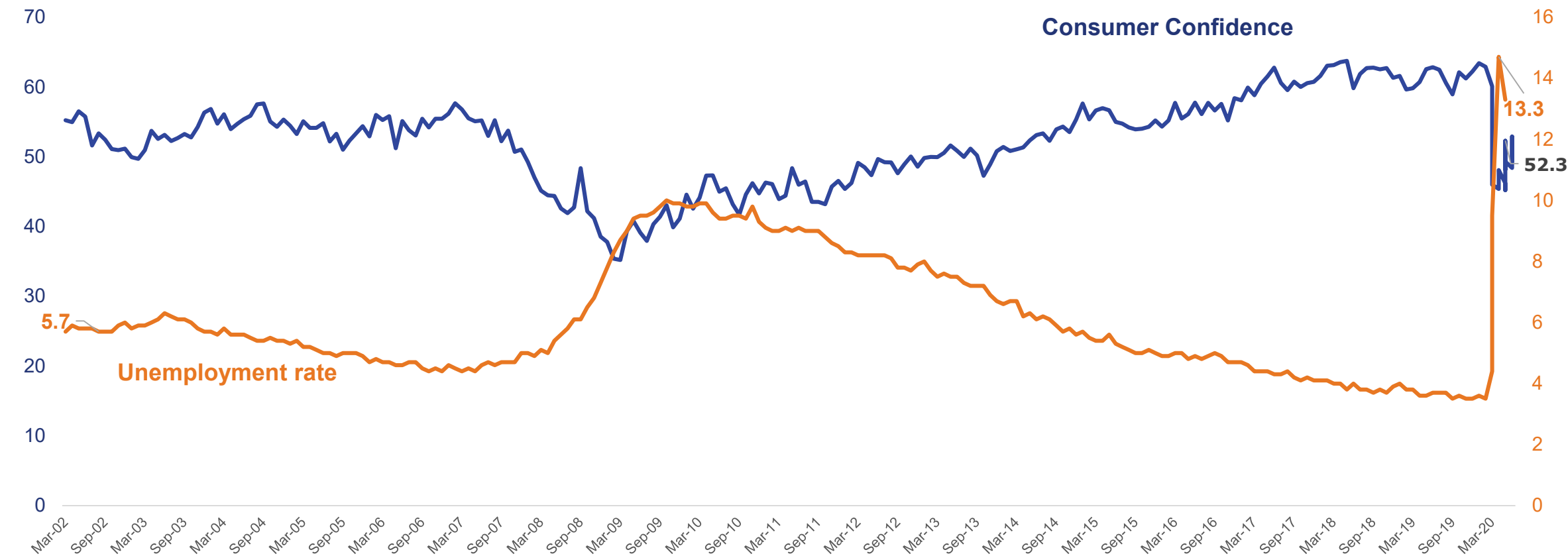
Ipsos Primary Consumer Sentiment Index / US Bureau of Labor Statistics

Impact of Coronavirus

Americans are socializing more

Have you done the following in the last week?

% Yes

Visited friends or relatives: 48%, 32%, 23%, 19%, 19%, 19%, 24%, 26%, 32%, 38%, 45%, 45%, 47%, 49%

Self-quarantined: 10%, 39%, 53%, 55%, 53%, 43%, 43%, 41%, 36%, 35%, 26%, 27%, 25%, 24%

March 13-16 · March 20-23 · March 27-30 · April 3-6 · April 10-13 · April 17-20 · April 24-27 · May 1-4 · May 8-11 · May 15-18 · May 29 - June 1 · June 5 – 8 · June 12-15 · June 19-22

━━ Visited friends or relatives   ━━ Self-quarantined
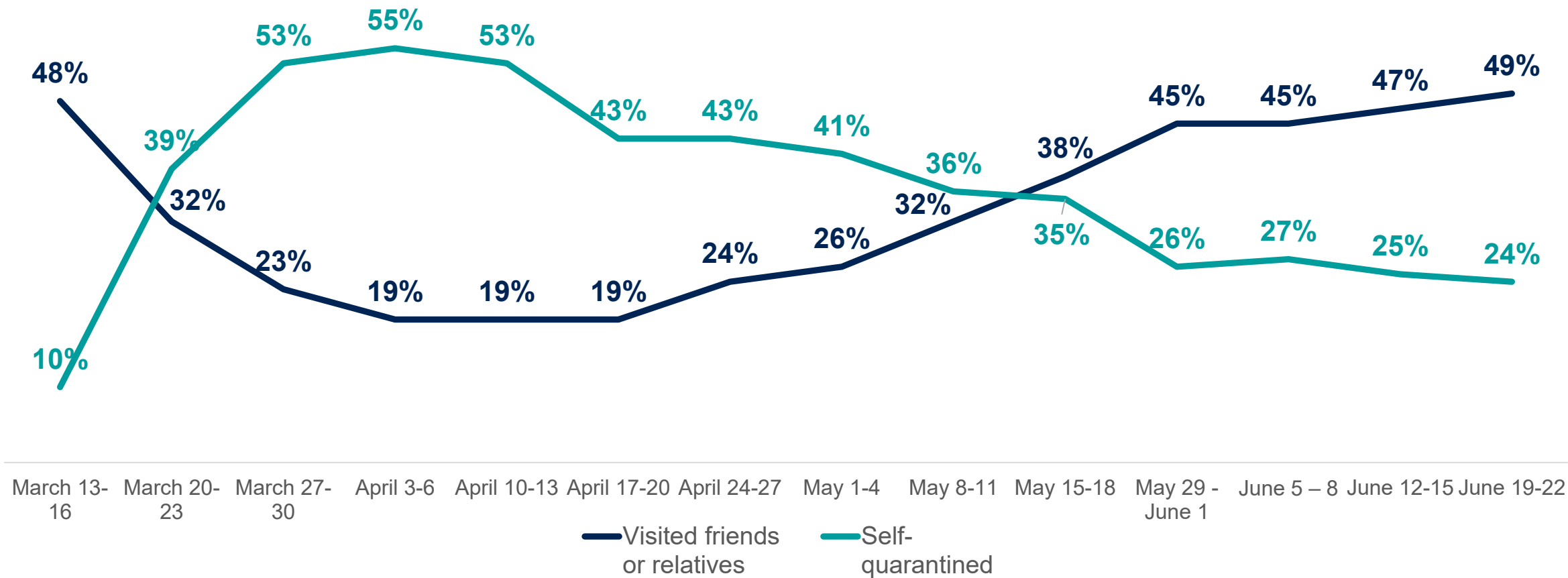
Coronavirus moving South and West

+2.3 million confirmed cases
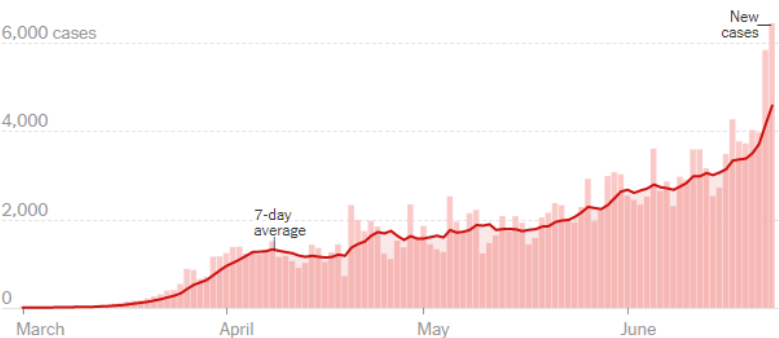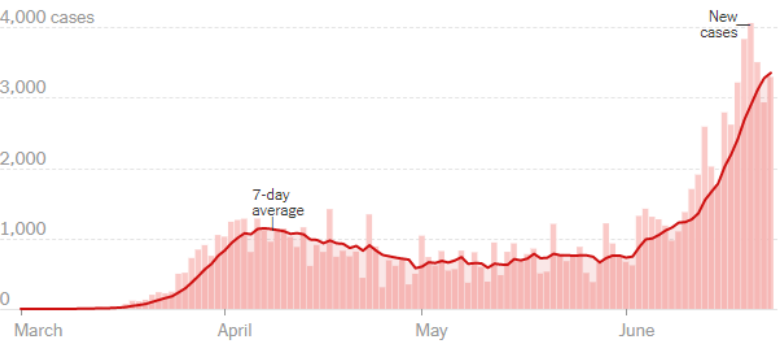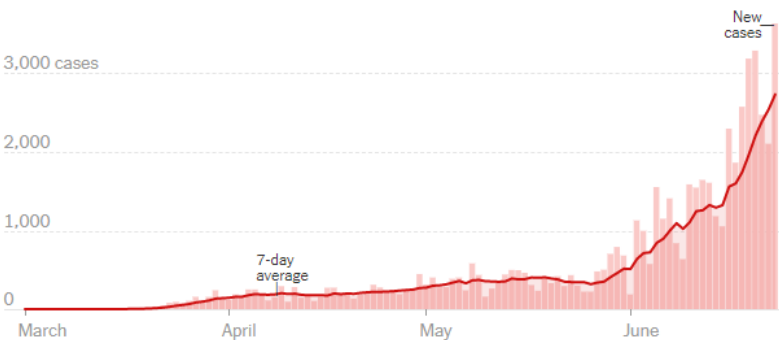
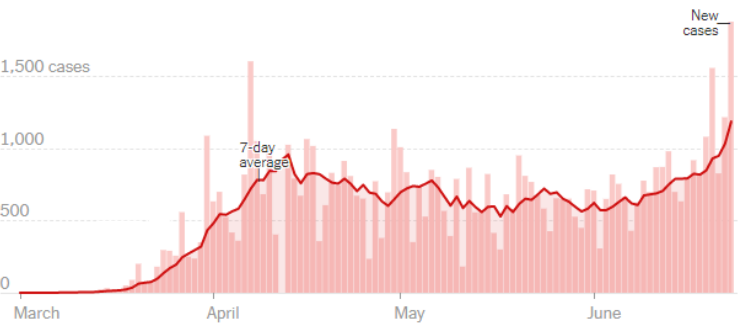### New reported cases by day in California

New reported cases by day in Florida

New reported cases by day in Arizona

New reported cases by day in Georgia

New reported cases by day in Texas
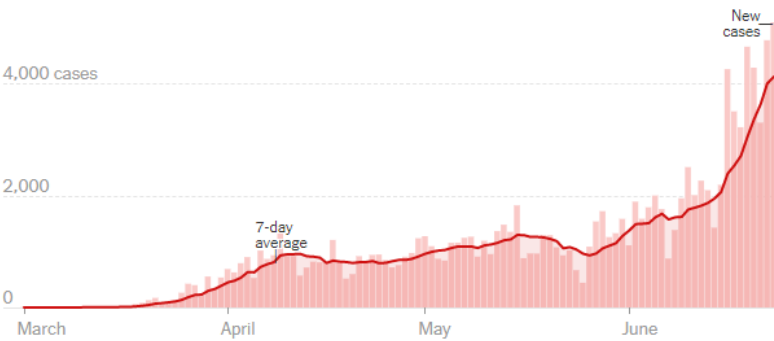
New reported cases by day in Oklahoma
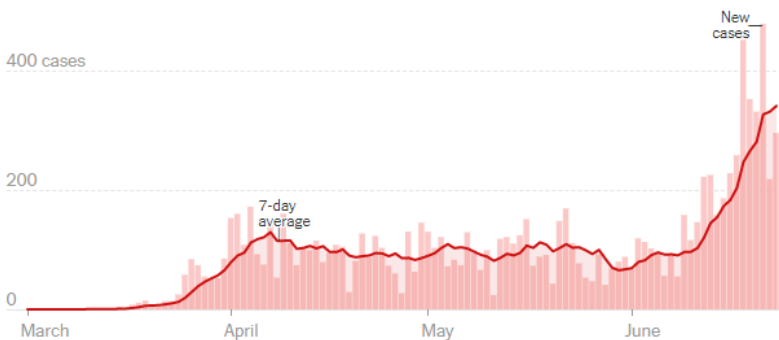
Source: New York Times

Partisan disparity in concern over coronavirus

How concerned are you, if at all, about the coronavirus or COVID-19 outbreak?

% Extremely/Very concerned

■ Democrats
■ Republicans
-- All Americans

	March 20–23	March 27–30	April 3–6	April 10–13	April 17–20	April 24–27	May 1-4	May 8-11	May 15-18	May 29-June 1	June 5-8	June 12-15	June 19-22
Democrats	72%	72%	82%	82%	80%	80%	76%	79%	78%	75%	62%	76%	75%
All Americans	59%	62%	67%	66%	64%	62%	58%	59%	59%	54%	48%	54%	56%
Republicans	46%	51%	58%	56%	49%	46%	40%	37%	41%	31%	31%	26%	38%
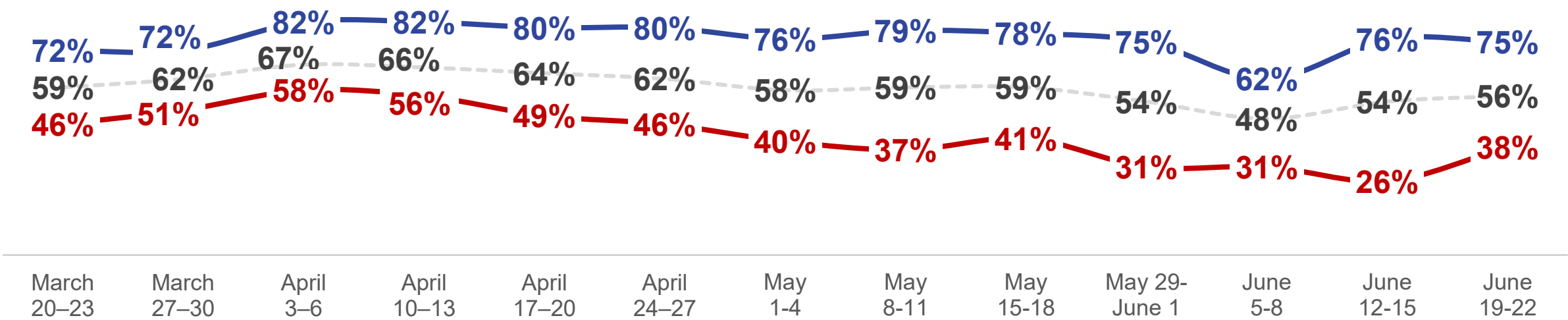
Perceived risk continues to increase

How much of a risk to your health and well-being do you think the following activities are right now?

% Large/Moderate Risk

Returning to your normal pre-COVID life	Dining in at a restaurant	Going to a salon, barber, or spa	Shopping at non-grocery retail stores	In-person gatherings of friends/family outside of household	Returning to your normal place of employment	Going to the grocery store

Returning to your normal pre-COVID life: 68%, 66%, 57%, 64%, **69%**

Dining in at a restaurant: 74%, 68%, 60%, 64%, **68%**

Going to a salon, barber, or spa: 66%, 63%, 54%, 58%, **62%**

Shopping at non-grocery retail stores: 64%, 60%, 52%, 57%, **62%**

In-person gatherings of friends/family outside of household: 64%, 59%, 52%, 57%, **62%**

Returning to your normal place of employment: 62%, 57%, 46%, 55%, **58%**

Going to the grocery store: 52%, 52%, 43%, 45%, **50%**

Dates for each: May 15-18, May 29-Jun 1, Jun 5-8, Jun 12-15, Jun 19-22

Axios/Ipsos Coronavirus Index.

Most Americans will stay home, avoid public if 2nd wave

Warning signs to trigger a return to quarantine behavior

% Very/Somewhat likely

CDC announcements **82%**

New spike in cases **81%**

Official state social distance order **80%**

Hospitals reporting full or near-full capacity **80%**

If there is a second wave of coronavirus in your state, how likely are you to…

% Very/Somewhat likely

Social distance – stay home and avoid others as much as possible **87%**

Stop having gatherings with friends and family outside of the home **80%**

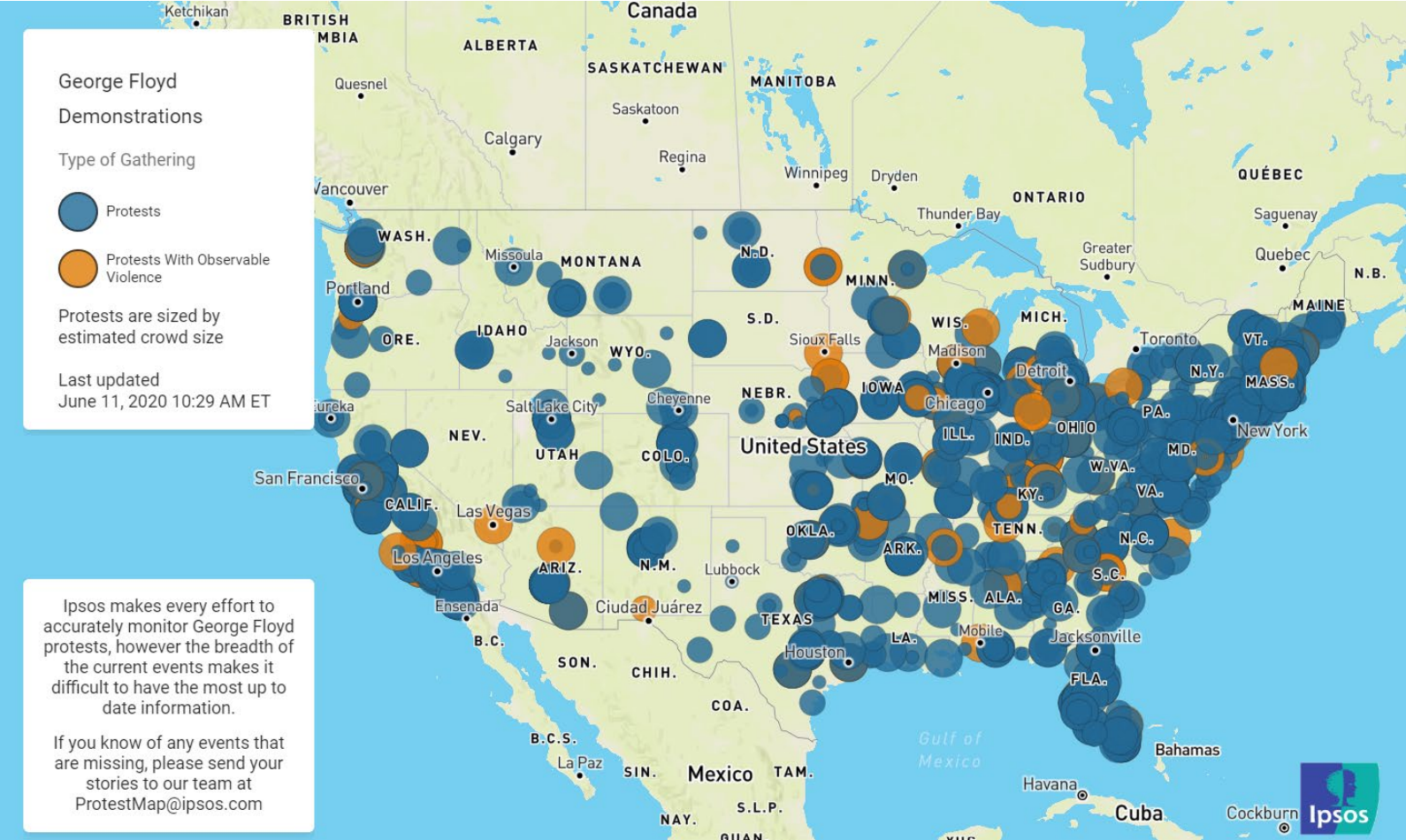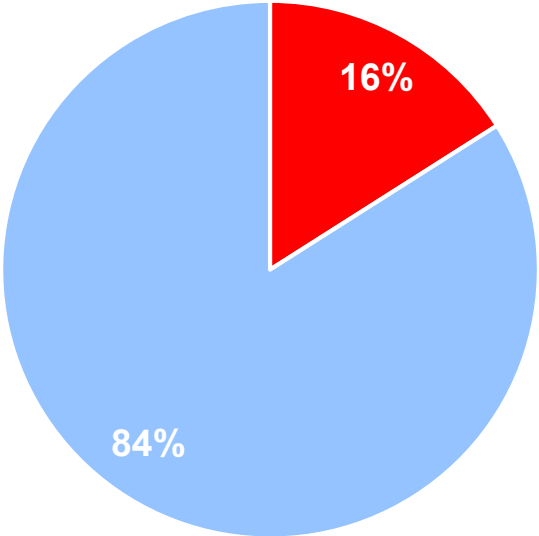Stop going to non-grocery retail stores **74%**

Black Lives Matter Demonstrations

2

Black Lives Matter demonstrations

Protests still ongoing across the nation, more than two weeks after George Floyd's death

George Floyd Demonstrations

Type of Gathering

- Protests
- Protests With Observable Violence

Protests are sized by estimated crowd size

Last updated June 11, 2020 10:29 AM ET

Ipsos makes every effort to accurately monitor George Floyd protests, however the breadth of the current events makes it difficult to have the most up to date information.

If you know of any events that are missing, please send your stories to our team at ProtestMap@ipsos.com
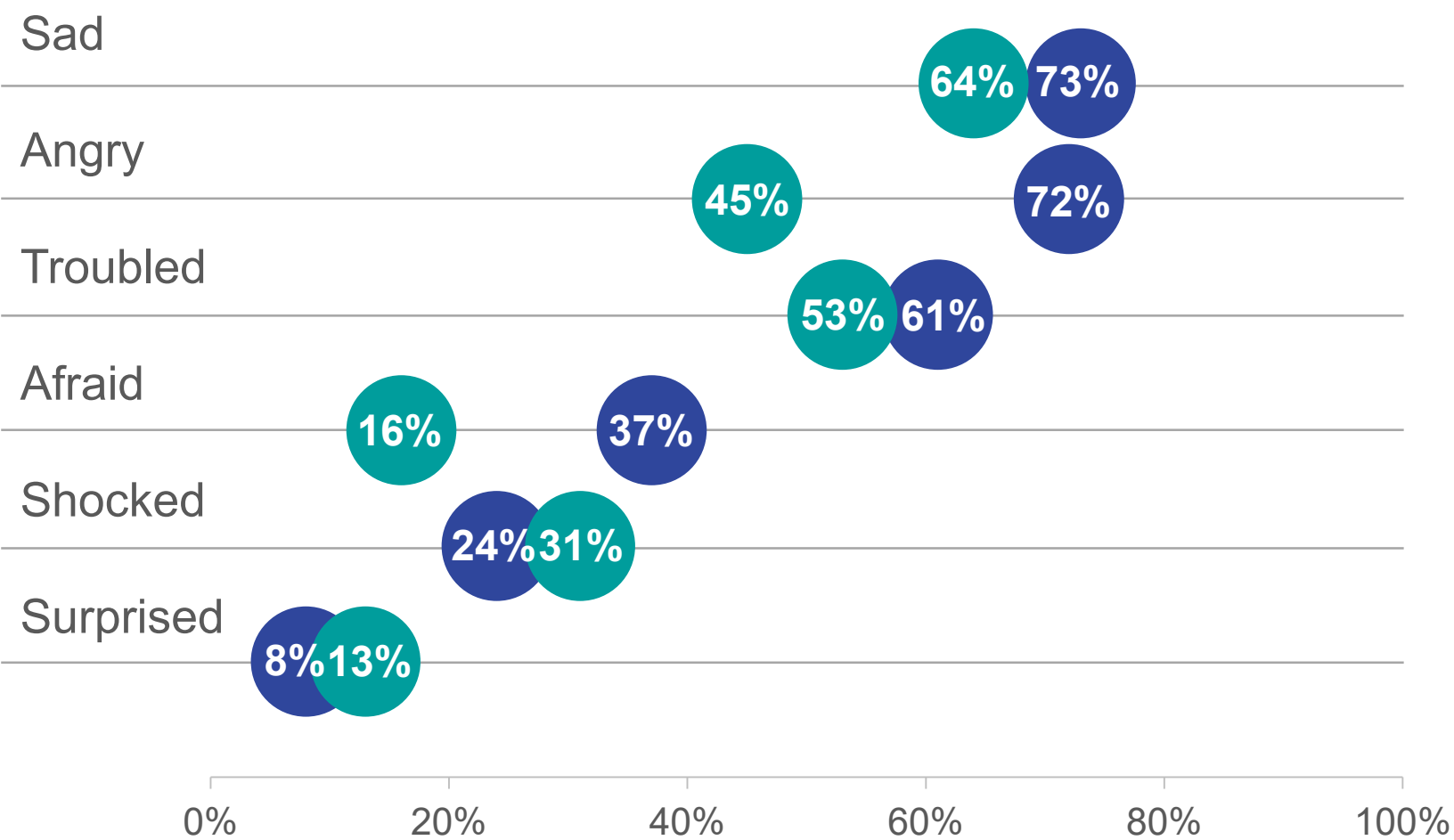
16%

84%

- Protest with observable violence
- Peaceful protests

Black Americans sad, angry about Floyd killing; not shocked

Overall, has Floyd's killing made you feel any of the following?

■ Black Americans
■ All Americans

Sad: 64% (All Americans), 73% (Black Americans)
Angry: 45% (All Americans), 72% (Black Americans)
Troubled: 53% (All Americans), 61% (Black Americans)
Afraid: 16% (All Americans), 37% (Black Americans)
Shocked: 24% (Black Americans), 31% (All Americans)
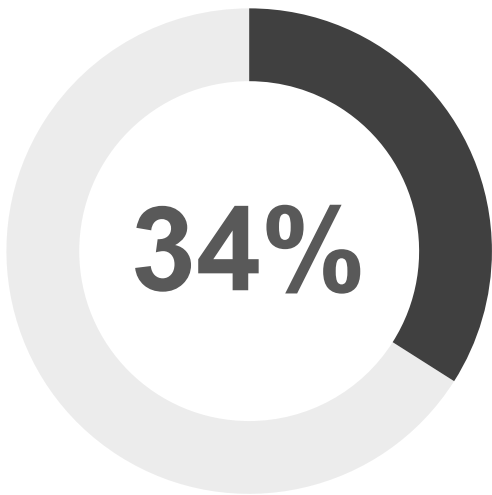Surprised: 8% (Black Americans), 13% (All Americans)

Most oppose "defund the police," but in favor of reform

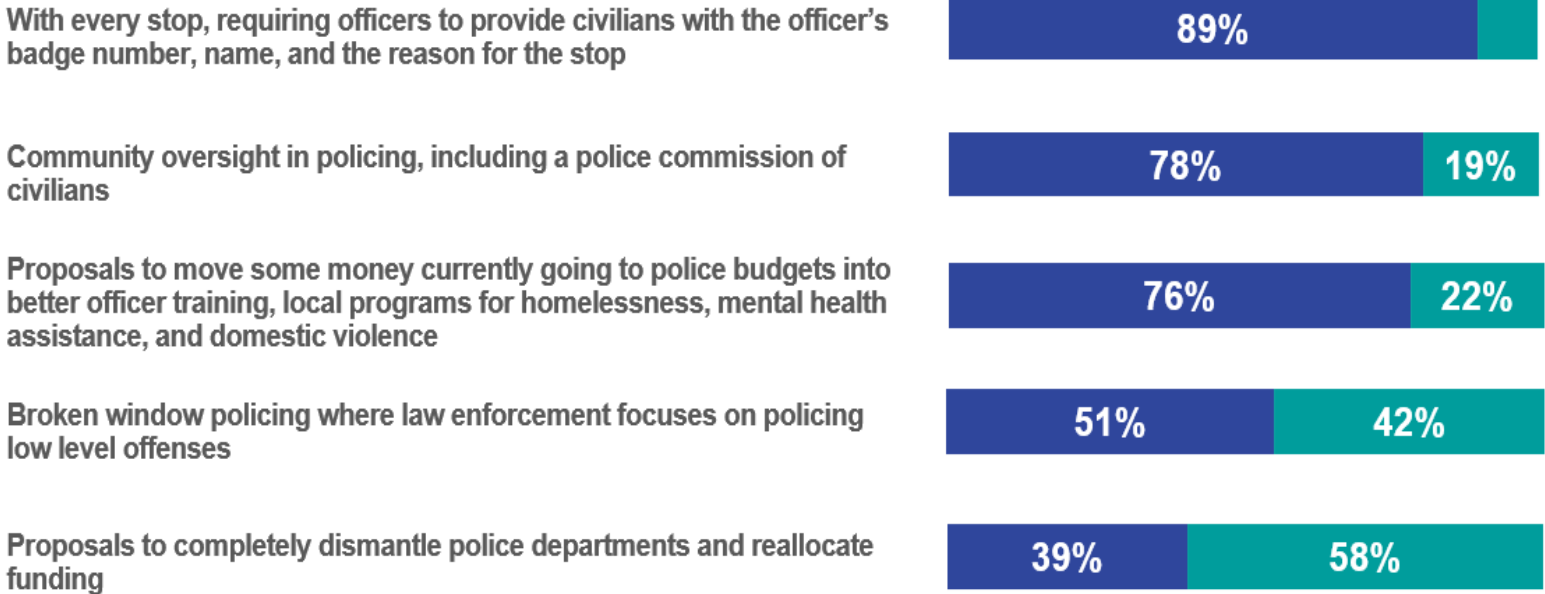Police reform receives broad, bipartisan support for many policies

Percentage of Americans who support "defund the police"

34%

All Americans

American support for and opposition for police reform

■ Support   ■ Oppose

Policy	Support	Oppose
With every stop, requiring officers to provide civilians with the officer's badge number, name, and the reason for the stop	89%	
Community oversight in policing, including a police commission of civilians	78%	19%
Proposals to move some money currently going to police budgets into better officer training, local programs for homelessness, mental health assistance, and domestic violence	76%	22%
Broken window policing where law enforcement focuses on policing low level offenses	51%	42%
Proposals to completely dismantle police departments and reallocate funding	39%	58%

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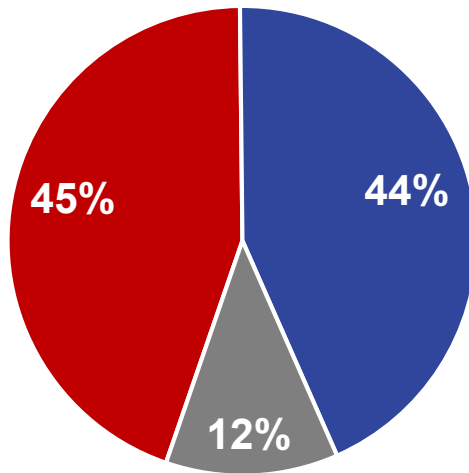
Americans divided between protests & enforcing law and order

Which of the following statements comes closer to your view, even if neither is exactly right?

All Americans

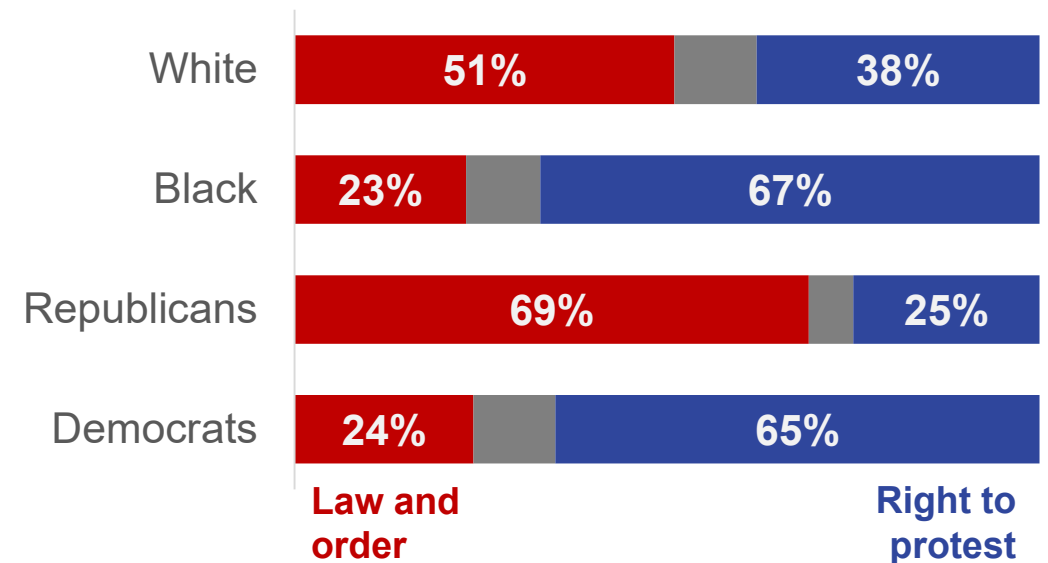- 45% — Law and order is the most important thing to ensure, even if it means limiting peaceful protests.
- 44%
- 12%

Legend:
- ■ (red) Law and order is the most important thing to ensure, even if it means limiting peaceful protests.
- ■ (blue) The right to protest is the most important thing to ensure, even if it means there are some incidents of violence.
- ■ (gray) Don't know

By race and partisanship

	Law and order		Right to protest
White	51%		38%
Black	23%		67%
Republicans	69%		25%
Democrats	24%		65%

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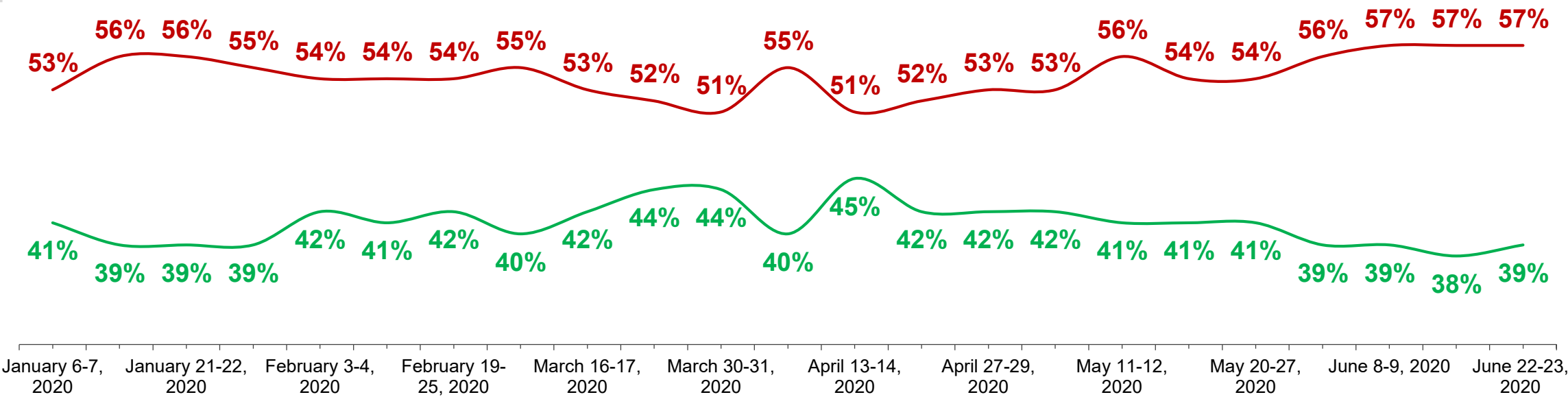# Perceptions of Donald Trump

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President Trump's approval rating in 2020

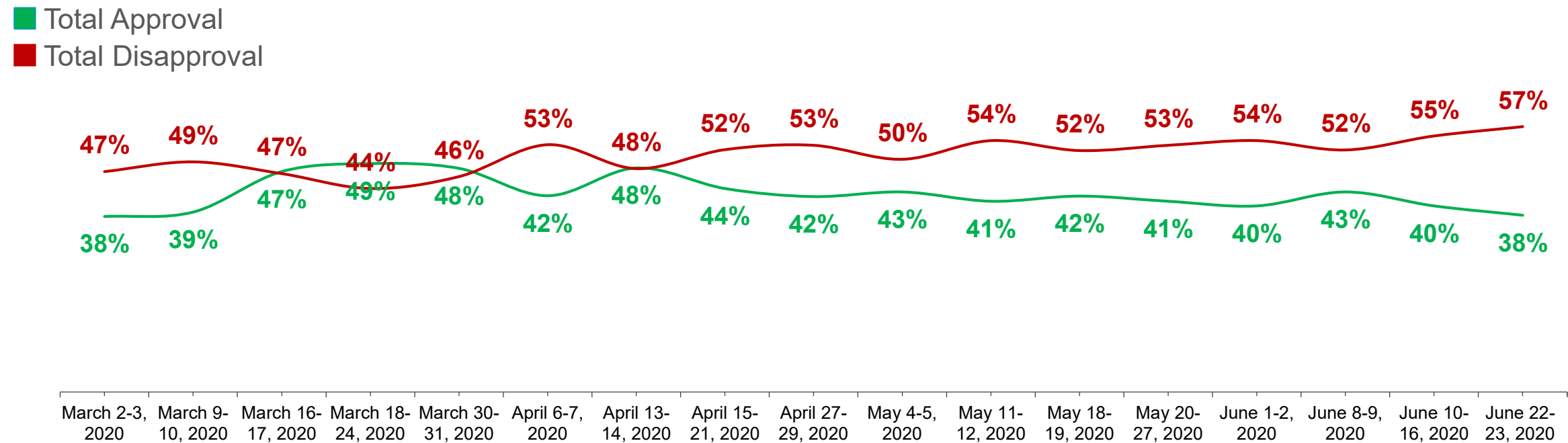**Overall, do you approve or disapprove of the way Donald Trump is handling his job as President?**

🟩 Total Approve
🟥 Total Disapprove

Total Disapprove: 53% 56% 56% 55% 54% 54% 54% 55% 53% 52% 51% 55% 51% 52% 53% 53% 56% 54% 54% 56% 57% 57% 57%

Total Approve: 41% 39% 39% 39% 42% 41% 42% 40% 42% 44% 44% 40% 45% 42% 42% 42% 41% 41% 41% 39% 39% 38% 39%

January 6-7, 2020 · January 21-22, 2020 · February 3-4, 2020 · February 19-25, 2020 · March 16-17, 2020 · March 30-31, 2020 · April 13-14, 2020 · April 27-29, 2020 · May 11-12, 2020 · May 20-27, 2020 · June 8-9, 2020 · June 22-23, 2020

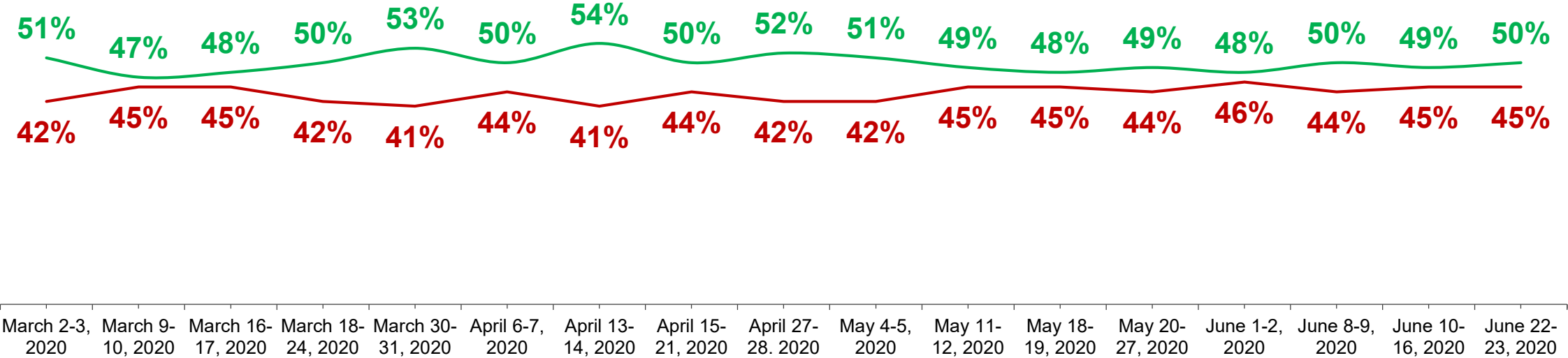© Ipsos

Economic approval rating remains flat

Do you approve or disapprove of the way Donald Trump is handling the following issues?
U.S Economy

■ Total Approval
■ Total Disapproval

51%   47%   48%   50%   53%   50%   54%   50%   52%   51%   49%   48%   49%   48%   50%   49%   50%

42%   45%   45%   42%   41%   44%   41%   44%   42%   42%   45%   45%   44%   46%   44%   45%   45%

March 2-3, 2020 | March 9-10, 2020 | March 16-17, 2020 | March 18-24, 2020 | March 30-31, 2020 | April 6-7, 2020 | April 13-14, 2020 | April 15-21, 2020 | April 27-28. 2020 | May 4-5, 2020 | May 11-12, 2020 | May 18-19, 2020 | May 20-27, 2020 | June 1-2, 2020 | June 8-9, 2020 | June 10-16, 2020 | June 22-23, 2020

Black Lives Matter Demonstrations

Do you approve or disapprove of how President Donald Trump has handled the recent protests and demonstrations?

	All Americans	White Americans	Black Americans	Hispanic Americans	White Americans, no college degree	White Americans, college degree or more
Strongly approve	15%	19%	3%	11%	21%	15%
Somewhat approve	13%	15%	6%	8%	15%	16%
Lean towards approve	7%	8%	5%	4%	9%	7%
Lean towards disapprove	8%	6%	7%	12%	6%	7%
Somewhat disapprove	8%	8%	8%	10%	7%	9%
Strongly disapprove	43%	38%	65%	46%	35%	43%
Not sure	6%	6%	6%	9%	7%	5%
TOTAL APPROVE	35%	42%	14%	23%	45%	37%
TOTAL DISAPPROVE	59%	52%	81%	68%	48%	59%

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General Election

4

Key issues impacting the 2020 election

If the 2020 presidential election were being held today, which of the following candidate traits would be the MOST important factor for you in deciding who to vote for?

	All Americans	Registered Voters	Democrat RV	Republican RV	Independent RV
Has a robust plan to help the nation recover from the impact of coronavirus	22%	22%	23%	24%	14%
Ability to restore trust in American government	33%	35%	42%	25%	45%
Strong on the economy and job creation	20%	20%	7%	35%	22%
Strong on healthcare	10%	9%	13%	4%	14%
Strong on immigration	5%	5%	3%	9%	1%
Strong on civil rights	11%	9%	13%	3%	4%

Reuters/Ipsos Data

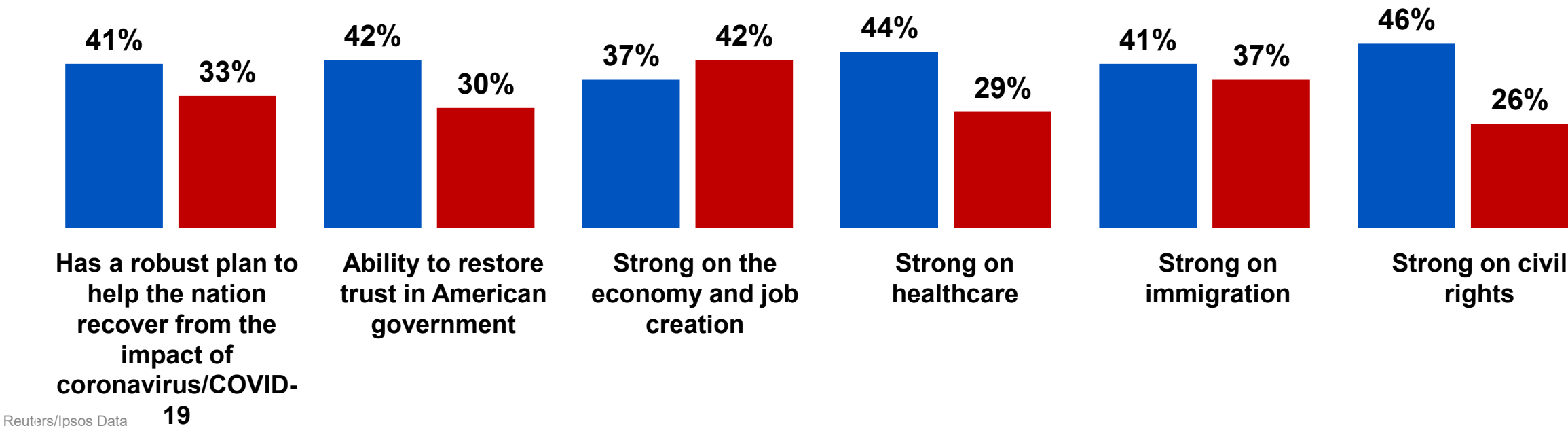© Ipsos

Biden and Trump's performance on key issues

For each of the following, please select the candidate you think is the best on that particular issue…

■ Joe Biden
■ Donald Trump

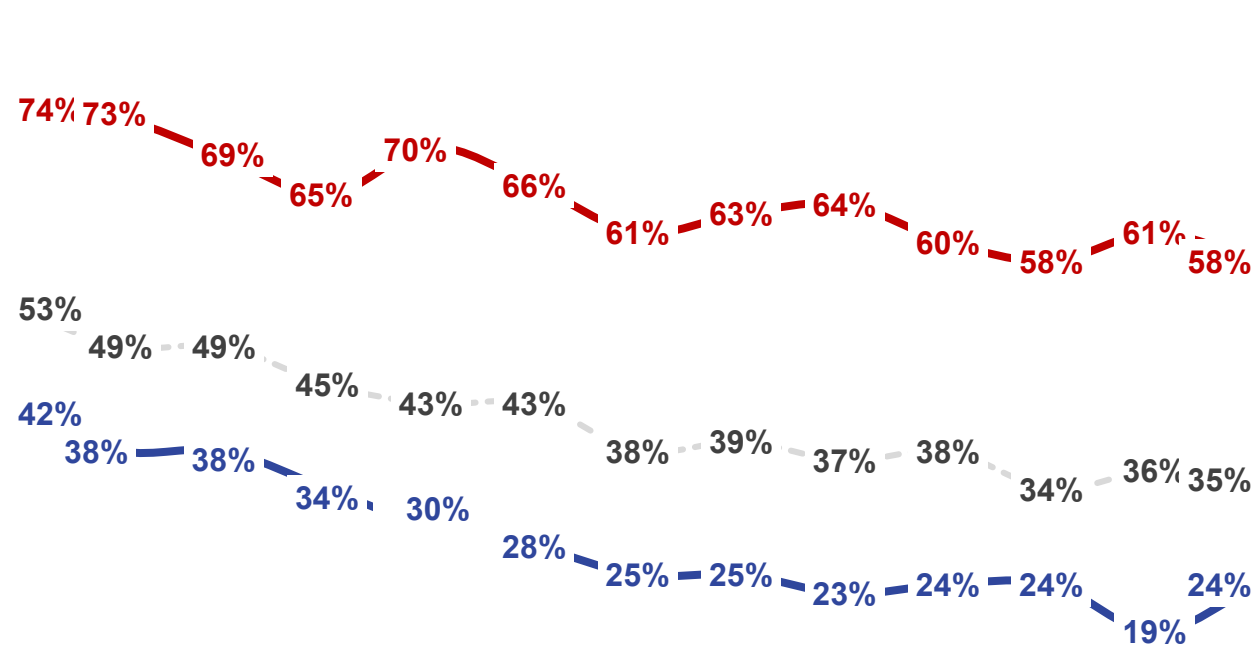| Has a robust plan to help the nation recover from the impact of coronavirus/COVID-19	Ability to restore trust in American government	Strong on the economy and job creation	Strong on healthcare	Strong on immigration	Strong on civil rights
41% / 33%	42% / 30%	37% / 42%	44% / 29%	41% / 37%	46% / 26%

Reuters/Ipsos Data

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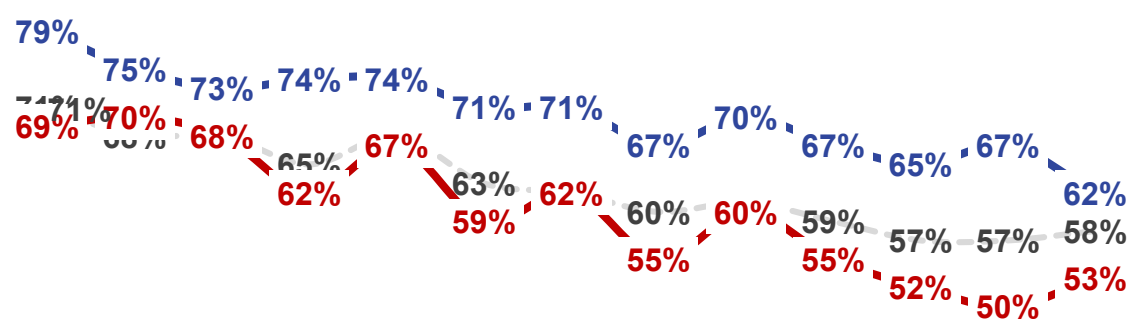# Partisan differences in trusting the government

How much trust do you have in each of the following to look out for the best interests of you and your family?

% A great deal/A fair amount ■ Democrats ■ Republicans - - All Americans

Federal government

74% 73%
69%
65%
70%
66%
61% 63% 64%
60% 58% 61% 58%

53%
49% 49%
45% 43% 43%
38% 39% 37% 38%
34% 36% 35%

42%
38% 38%
34%
30%
28%
25% 25% 23% 24% 24% 24%
19%

State government

79%
75% 73% 74% 74%
71% 71% 70%
67% 67% 65% 67%
62%

71% 70%
69% 68% 65% 67%
63%
60% 60% 59%
57% 57% 58%

69% 62% 59% 62%
55% 55% 52% 50% 53%

General Election Vote Share

If the 2020 presidential election were held today, would you vote for Donald Trump or Joe Biden?

|	All Adults	Registered Voters	Democratic Registered Voters	Republican Registered Voters	Independent Registered Voters
Donald Trump	**34%**	**37%**	**6%**	**82%**	**24%**
Joe Biden	**43%**	**47%**	**85%**	**8%**	**24%**
Some other candidate	9%	8%	6%	5%	27%
I would not vote	7%	2%	1%	0%	12%
Not sure	7%	6%	3%	5%	12%

Reuters/Ipsos Data

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2016 vs 2020 – What's changed?

If the 2016 presidential election were being held today and the candidates were as below, for whom would you vote? If the 2020 presidential election were held today, would you vote for Donald Trump or Joe Biden?
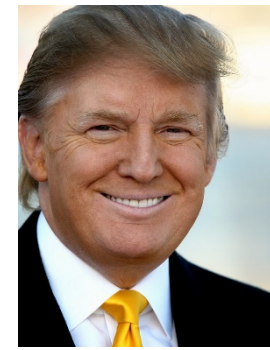
	Donald Trump		Joe Biden		Don't know/ Other/ Wouldn't vote	
	2020	Change from 2016	2020	Change from 2016 (Hillary Clinton)	2020	Change from 2016
All Americans	34%	+2	43%	+4	23%	-6
White Americans	43%	+4	39%	+7	18%	-11
Black Americans	7%	+3	67%	-9	25%	+6
Hispanic Americans	24%	-4	45%	+7	31%	-3
White, no college degree	46%	+3	34%	+9	20%	-12
White, college degree or more	38%	+6	47%	+2	15%	-7

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Current polling vs 2016 election results

If the 2016 presidential election were being held today and the candidates were as below, for whom would you vote? If the 2020 presidential election were held today, would you vote for Donald Trump or Joe Biden?

	Donald Trump		Joe Biden	
	2020	**Change from 2016**	**2020**	**Change from 2016 (Hillary Clinton)**
All Americans	44%	-2	56%	+8
White Americans	52%	-5	48%	+11
Black Americans	9%	+1	91%	+2
Hispanic Americans	35%	+7	65%	-1
White, no college degree	58%	-8	43%	+14
White, college degree or more	45%	-3	55%	+10

2020 poll rebased to 100%, omitting undecided

Ipsos Resources

Axios-Ipsos Coronavirus Index

Reuters/Ipsos Public Opinion Partnership

IpsosGlobalIndicators.com

The Point Being – an Ipsos Podcast overview of public opinion trends

Cliff's Take –Weekly Ipsos Thought Leadership

All our public polling: https://www.ipsos.com/en-us/news-and-polls/news

Ipsos Coronavirus Central: https://www.ipsos.com/en-us/knowledge/society/covid19-research-in-uncertain-times

THANK YOU!

Questions?

About Ipsos

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ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

Game Changers

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You act better when you are sure.