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

July 23, 2020

Ipsos

AGENDA

1. IMPACT OF CORONAVIRUS

2. PERCEPTIONS OF DONALD TRUMP

3. GENERAL ELECTION

4. ELECTION FORECASTING

5. QUESTIONS

Most Important Problem Facing America

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

■ Healthcare   ■ Economy generally
■ Immigration   ■ Unemployment/jobs

|	January 2012	December 2019	March 2020	May 2020	June 2020	July 2020
Healthcare	6%	18%	28%	20%	17%	19%
Economy + Jobs	65%	16%	20%	35%	29%	27%
Immigration	3%	15%	9%	6%	5%	5%
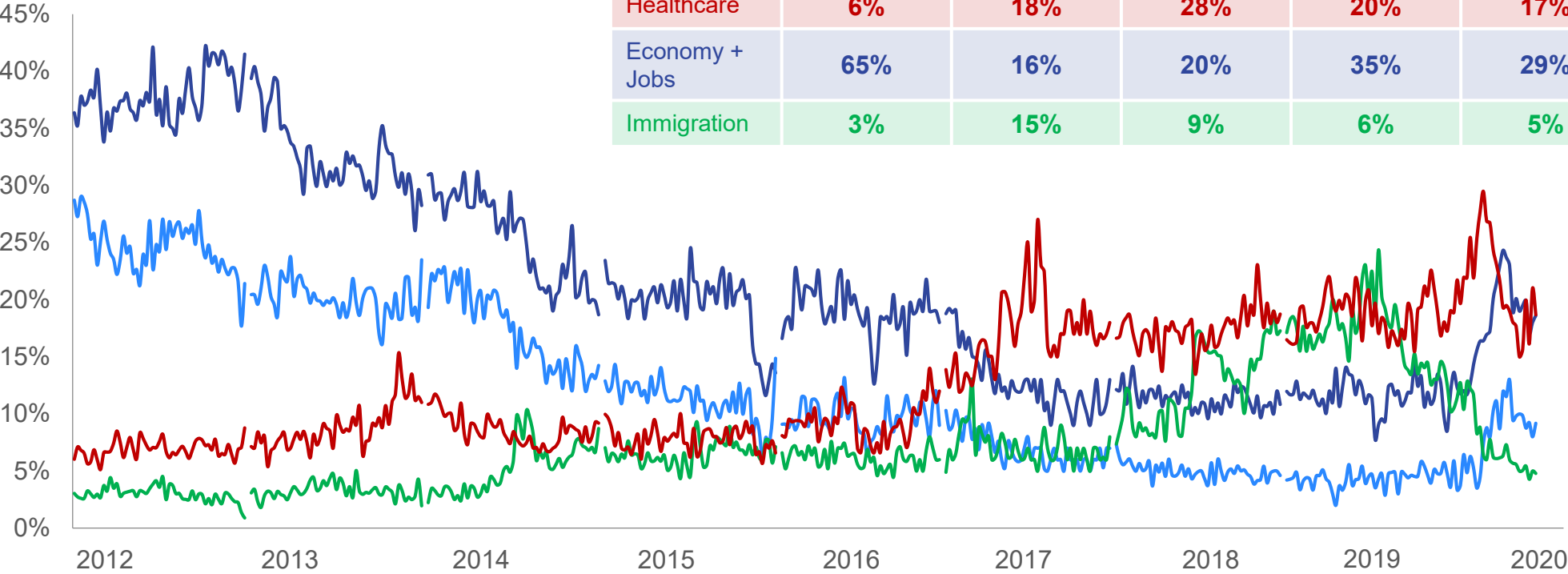
About 1 in 10 are volunteering 'coronavirus'

Ipsos Primary Consumer Sentiment Index / US Bureau of Labor Statistics

Consumer perceptions not in line with economic reality

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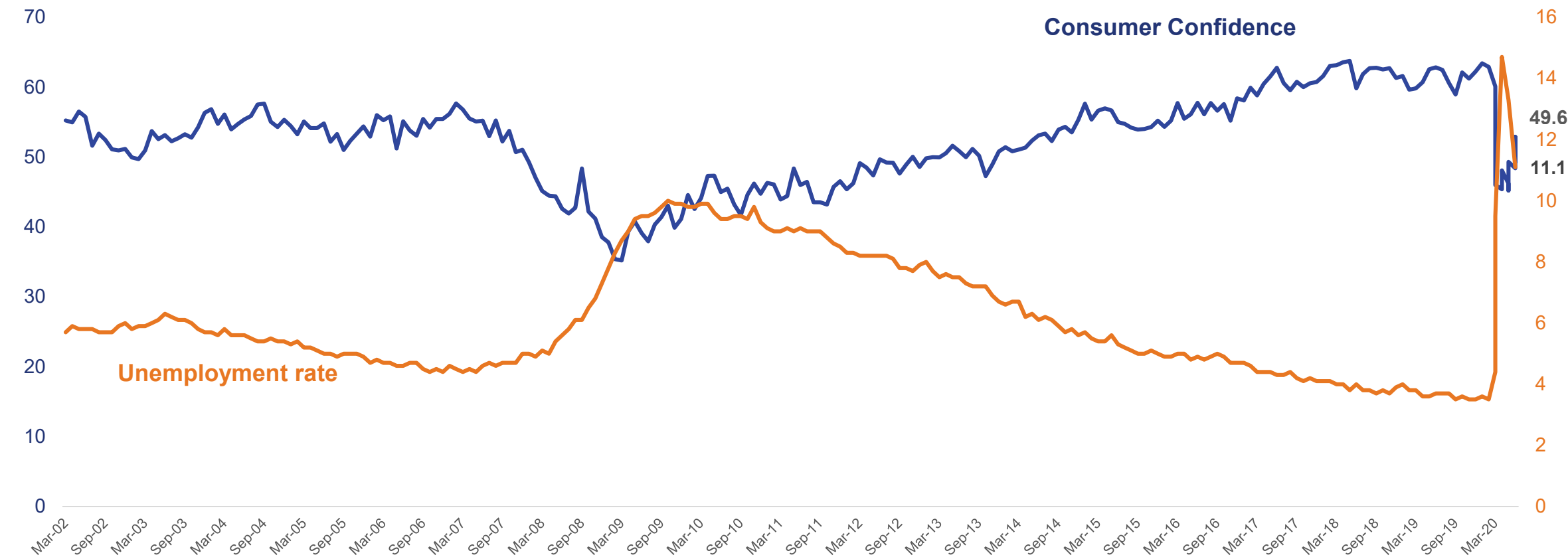
Ipsos Primary Consumer Sentiment Index / US Bureau of Labor Statistics

Impact of Coronavirus

Five states account for one-third of infections

+3.9 million confirmed cases, +142,000 deaths

New Reported Cases in the U.S.

60,000 cases

40,000

7-day average

20,000

0

New cases —

March   April   May   June   July

Source: New York Times

Florida, Arizona, Georgia, Texas, California ONLY

254,824

1,434,821

Total United States

464,891

3,938,598
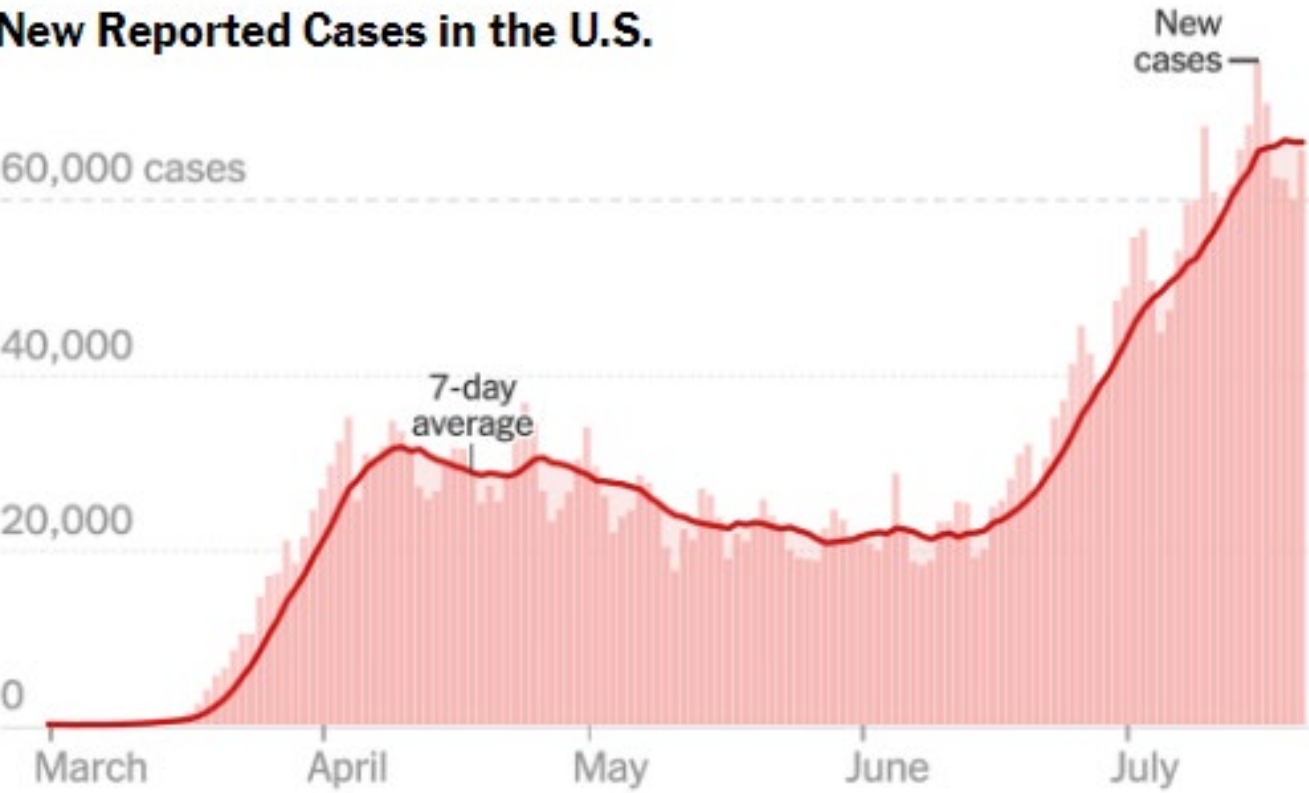
■ **New cases last 7 days**   ■ **Total Cases**
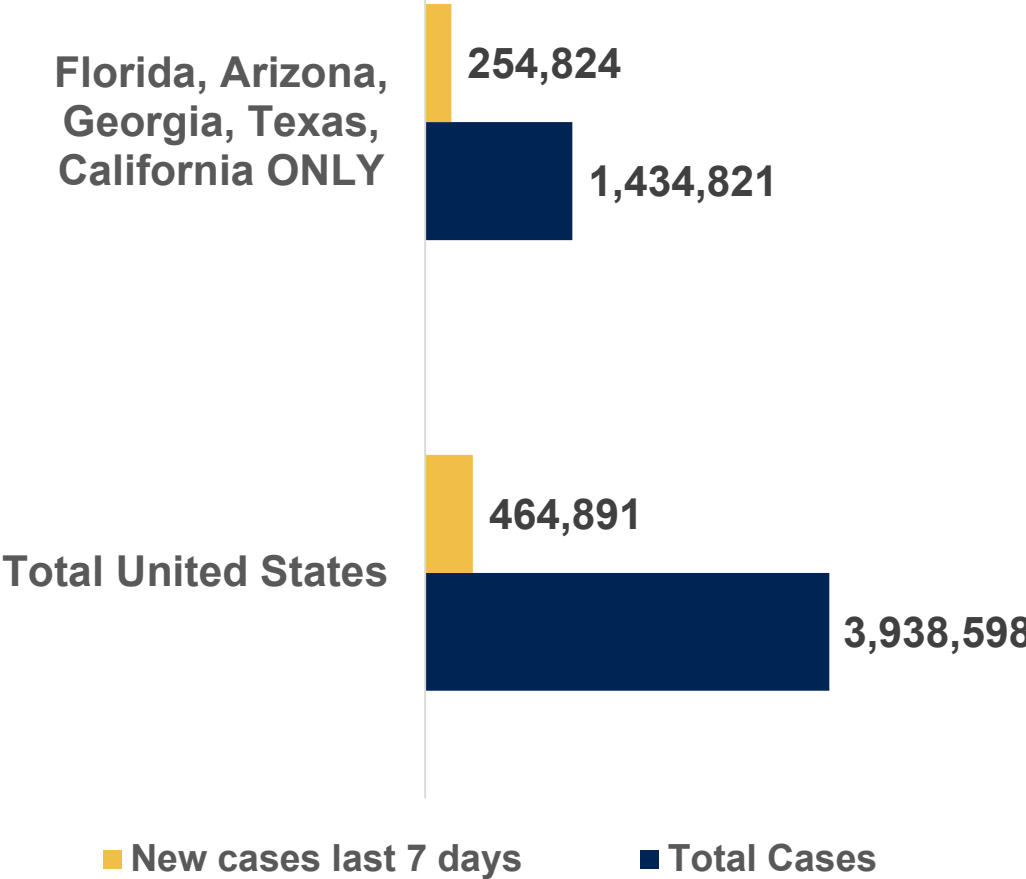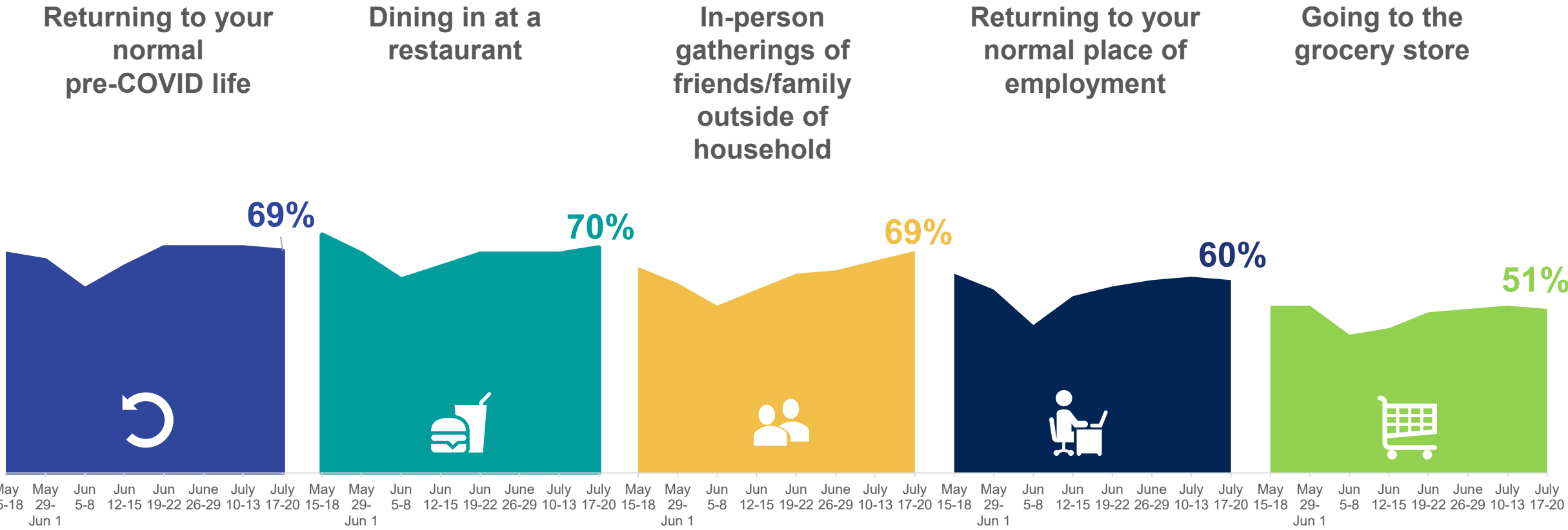
Perceived risk is on the rise

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

In-person gatherings of friends/family outside of household

Returning to your normal place of employment

Going to the grocery store

69%

70%

69%

60%

51%

Returning to your normal pre-COVID life timeline:
May 15-18, May 29-Jun 1, Jun 5-8, Jun 12-15, Jun 19-22, June 26-29, July 10-13, July 17-20

Dining in at a restaurant timeline:
May 15-18, May 29-Jun 1, Jun 5-8, Jun 12-15, Jun 19-22, June 26-29, July 10-13, July 17-20

In-person gatherings of friends/family outside of household timeline:
May 15-18, May 29-Jun 1, Jun 5-8, Jun 12-15, Jun 19-22, June 26-29, July 10-13, July 17-20

Returning to your normal place of employment timeline:
May 15-18, May 29-Jun 1, Jun 5-8, Jun 12-15, Jun 19-22, June 26-29, July 10-13, July 17-20

Going to the grocery store timeline:
May 15-18, May 29-Jun 1, Jun 5-8, Jun 12-15, Jun 19-22, June 26-29, July 10-13, July 17-20

Mask usage is increasing, Republicans least likely to comply

When you leave your home, are you wearing a mask?

% At all times
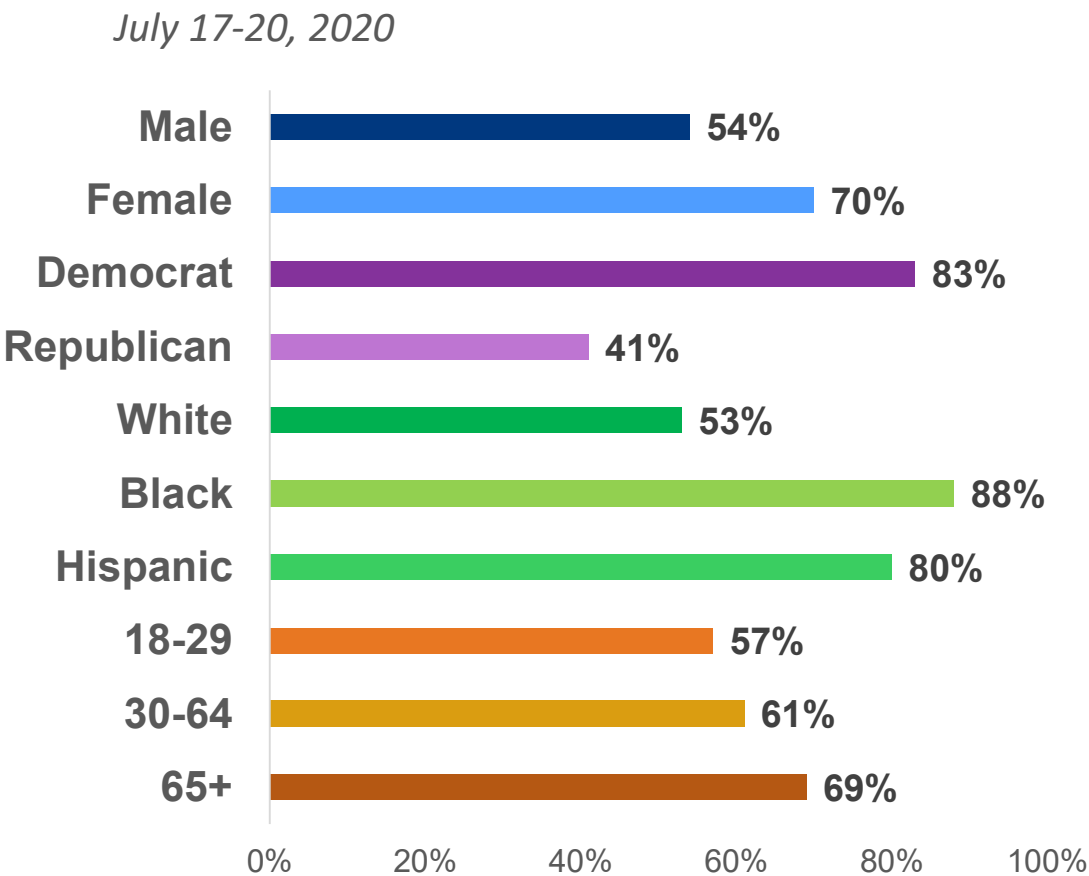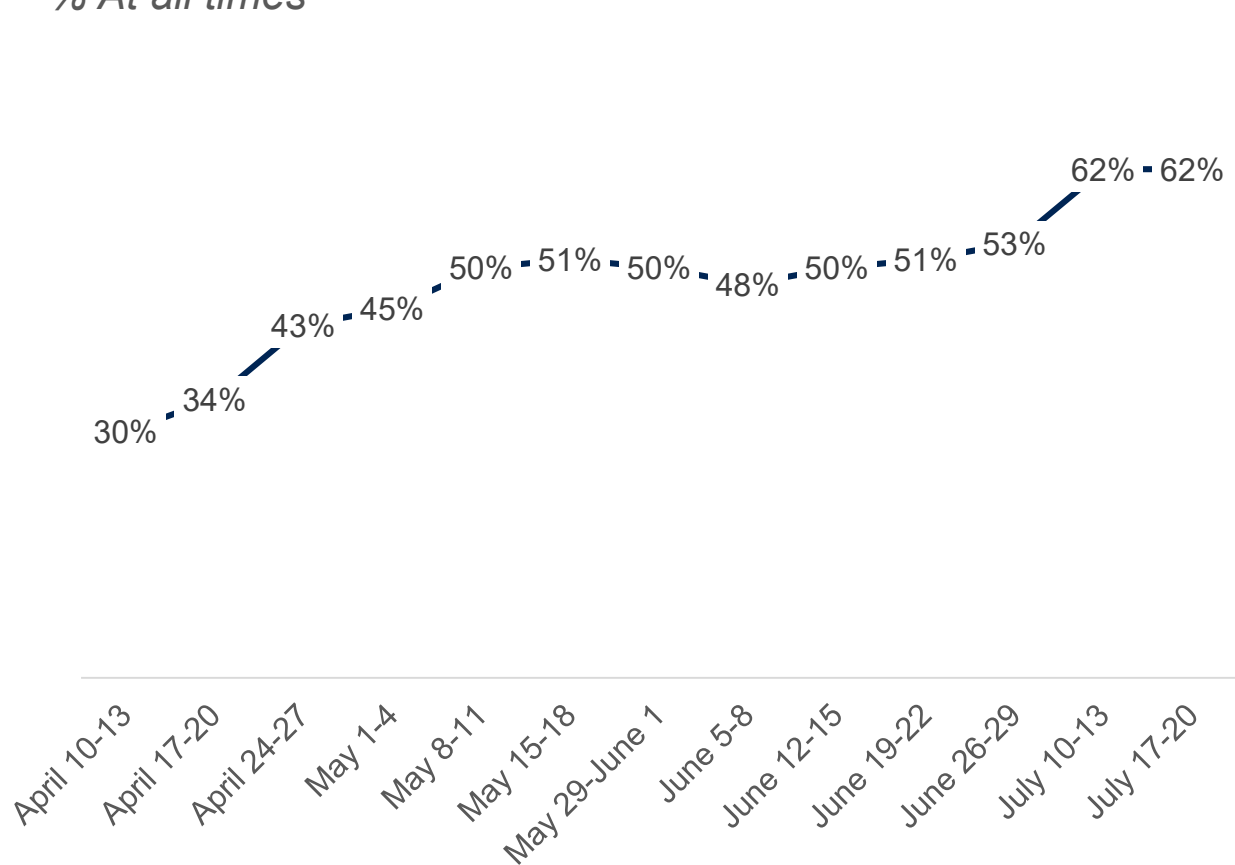
July 17-20, 2020

Line chart (% At all times) by wave:
- April 10-13: 30%
- April 17-20: 34%
- April 24-27: 43%
- May 1-4: 45%
- May 8-11: 50%
- May 15-18: 51%
- May 29-June 1: 50%
- June 5-8: 48%
- June 12-15: 50%
- June 19-22: 51%
- June 26-29: 53%
- July 10-13: 62%
- July 17-20: 62%

Bar chart:
- Male: 54%
- Female: 70%
- Democrat: 83%
- Republican: 41%
- White: 53%
- Black: 88%
- Hispanic: 80%
- 18-29: 57%
- 30-64: 61%
- 65+: 69%

Americans are socializing more

Have you done the following in the last week?

% Yes

— Visited friends or relatives   — Self-quarantined
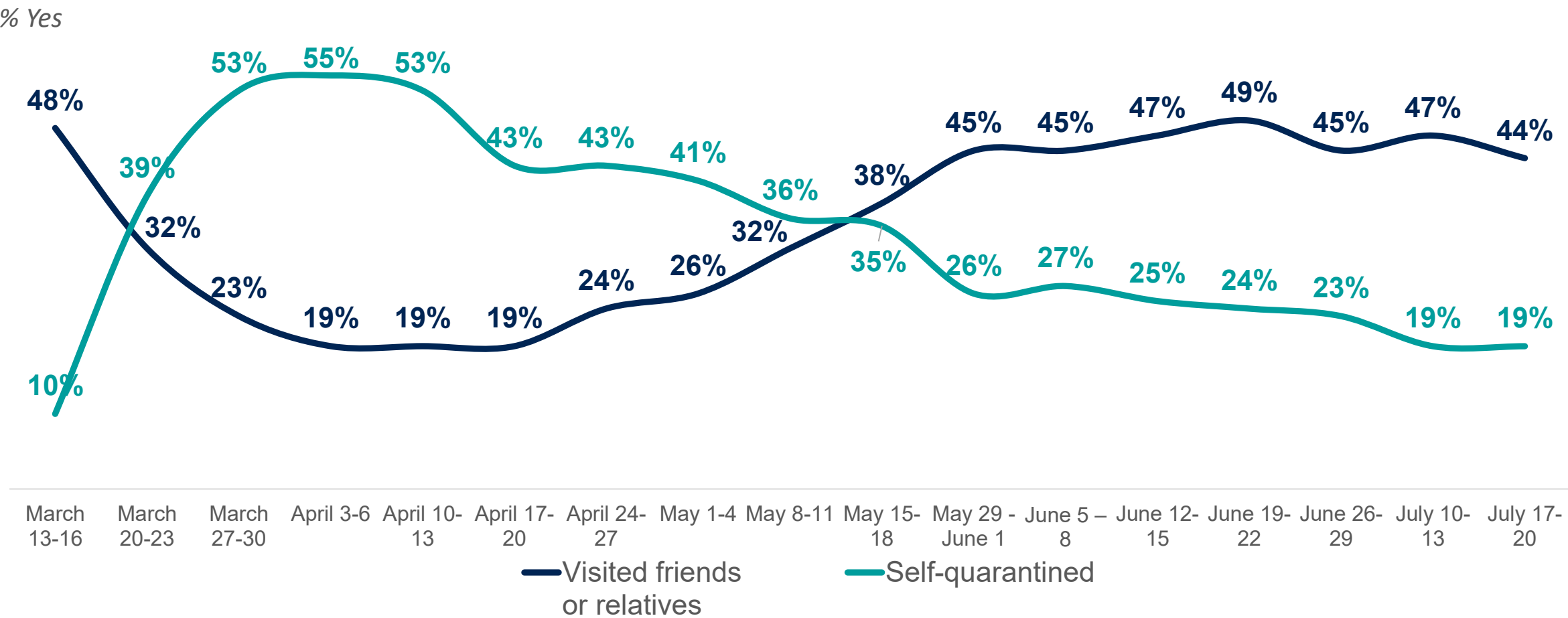
Americans believe other Americans are hindering U.S. recovery

Most think their fellow citizens are making the situation worse; meanwhile, those who visit family/friends not taking precautions

Percentage of Americans who believe other Americans are behaving in ways that are making the country's recovery from the pandemic *somewhat* or *much worse*

- ■ All Americans
- ■ Democrats
- ■ Republicans

74%

83%

65%
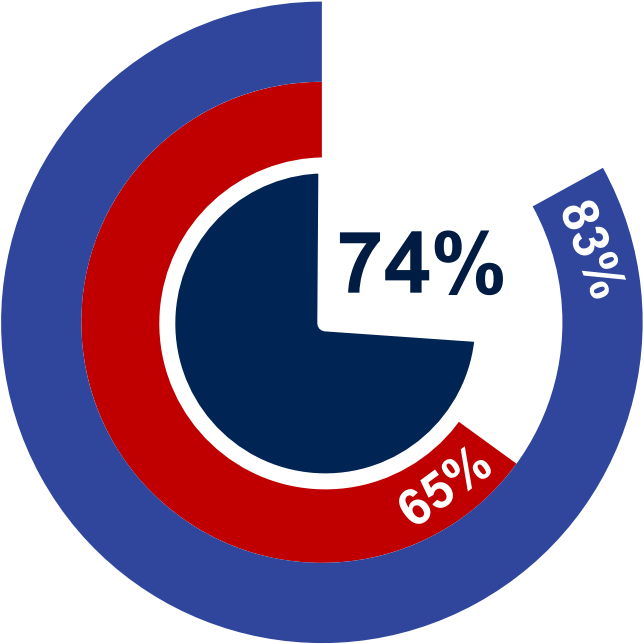
Percentage of Americans who have visited friends and/or relatives in the last week

44%

Visited friends and/or relatives in the last week

18%

Wore a mask at all times while visiting friends/family

23%

Maintained a 6 foot distance at all times while visiting friends/family
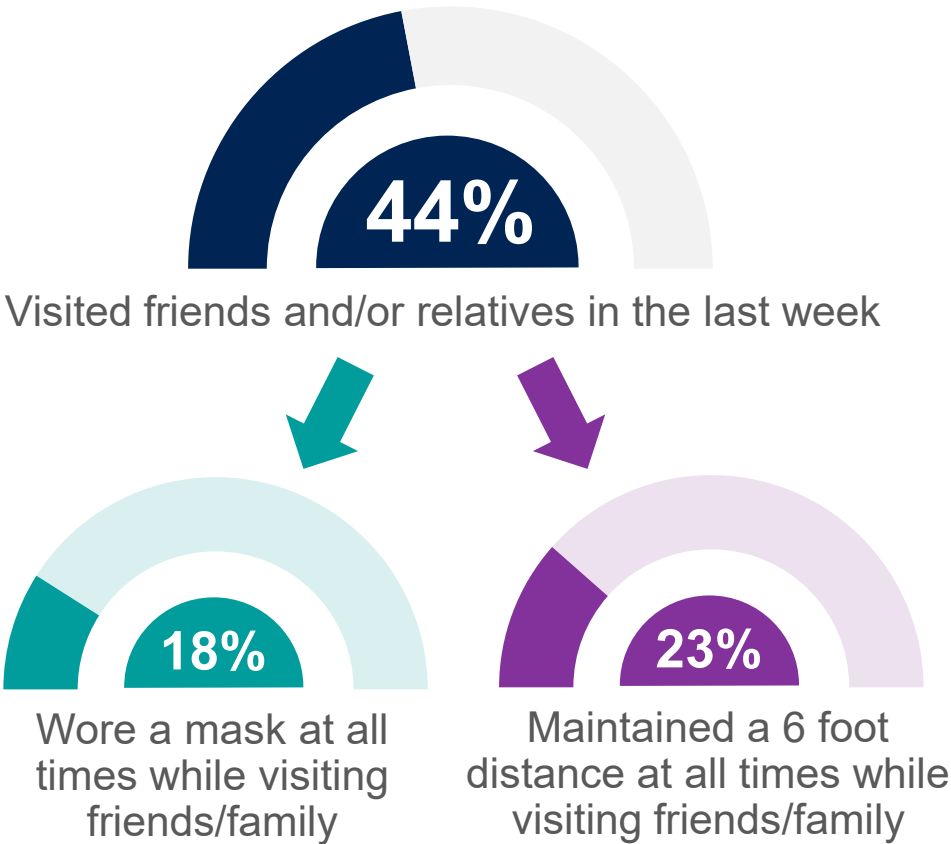
Perceptions of Donald Trump

2

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2 in 5 Americans believe Trump knew about Russian bounties

Which of the following comes closest to your opinion?

% say *President Trump did know that Russia was paying Taliban members to kill American soldiers in Afghanistan*

All Americans	Democrats	Republicans	Independents
39%	66%	14%	30%

Reuters/Ipsos Data

© Ipsos

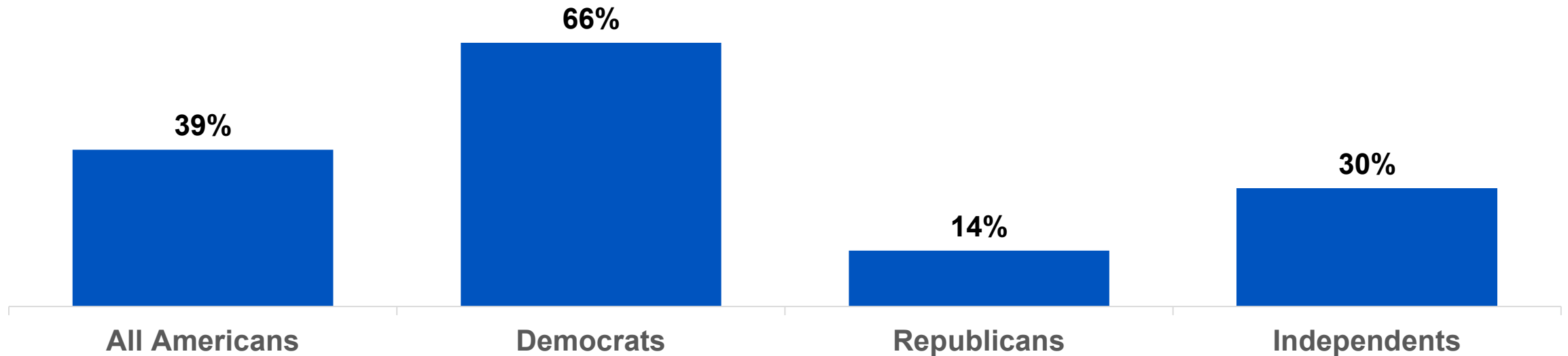# Many Americans think Trump should release his tax returns

Donald Trump should release his tax returns from earlier years

% Strongly/Somewhat Agree

All Americans	Democrats	Republicans	Independents
66%	89%	39%	69%
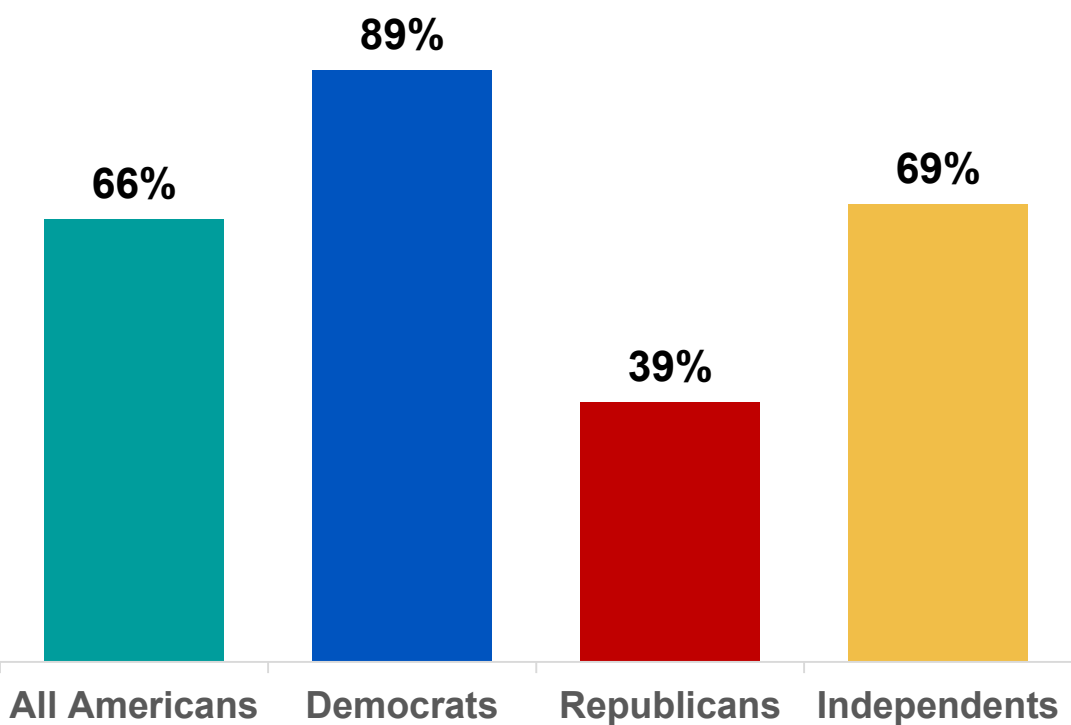
In your opinion, what is the main reason you believe Donald Trump has yet to release his tax information?

	All Americans	Democrats	Republicans	Independents
They contain incriminating evidence against him	26%	44%	6%	29%
He does not pay taxes because of loopholes in the tax code	16%	22%	9%	17%
He is fighting back against the far left	14%	2%	31%	6%
He is trying to hide significant financial losses from his businesses	10%	13%	7%	8%
He is currently under audit by the IRS and will release them when the audit concludes	7%	3%	13%	5%
He is too busy fighting the spread coronavirus	3%	3%	4%	4%
Something else	8%	2%	12%	14%
Don't know	16%	12%	17%	17%

Reuters/Ipsos Data

© Ipsos

President Trump's approval on coronavirus

Do you approve or disapprove of the way Donald Trump is handling the following issues?
Coronavirus/COVID-19:

■ Total Approval
■ Total Disapproval

Total Disapproval values: 47% 49% 47% 44% 46% 53% 48% 52% 53% 50% 54% 52% 53% 54% 52% 55% 57% 56% 57% 57% 58%

Total Approval values: 38% 39% 47% 49% 48% 42% 48% 44% 42% 43% 41% 42% 41% 40% 43% 40% 38% 39% 37% 37% 38%

| 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 27-29, 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 | June 29-30, 2020 | July 6-7, 2020 | July 13-14, 2020 | July 15-21, 2020 |

Reuters/Ipsos Data

© 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% 50% 48% 49% 48%

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

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 | June 29-30, 2020 | July 6-7, 2020 | July 13-14, 2020 | July 15-21, 2020
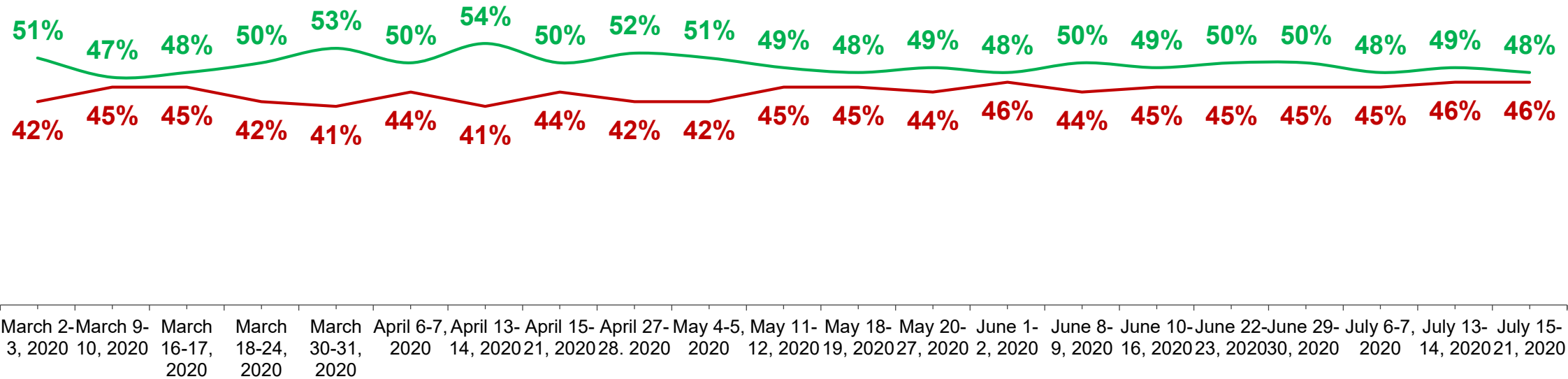
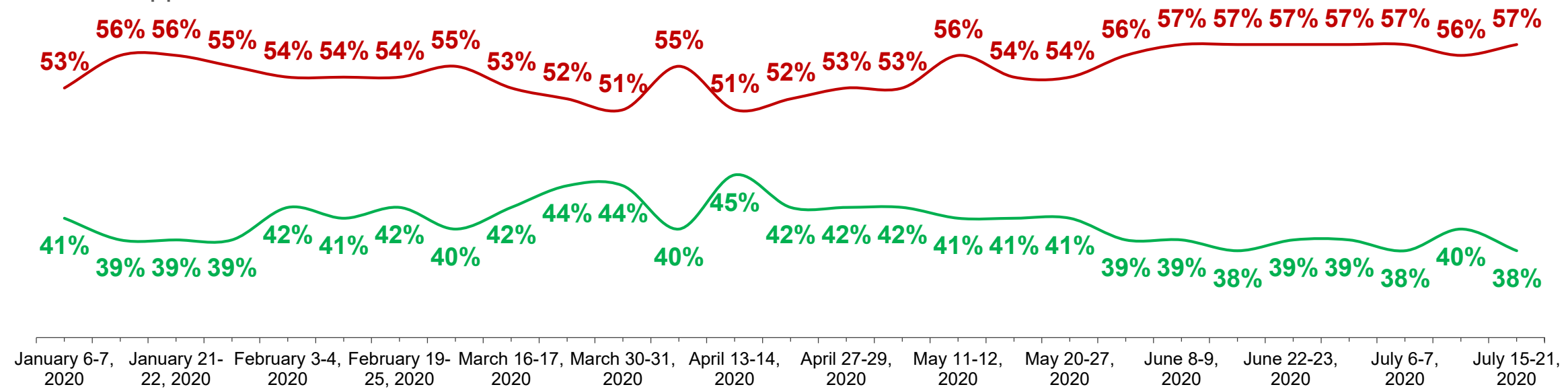# President Trump's approval rating in 2020

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

🟩 Total Approval
🟥 Total Disapproval

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

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

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 · July 6-7, 2020 · July 15-21, 2020

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General Election

3

General Election Vote Share

If the 2020 presidential election were held today, would you vote for Donald Trump or Joe Biden? *Order of candidates is randomly rotated in question text*

	All Adults	Registered Voters	Democratic Registered Voters	Republican Registered Voters	Independent Registered Voters
Donald Trump	**34%**	**38%**	**6%**	**80%**	**23%**
Joe Biden	**43%**	**46%**	**83%**	**8%**	**29%**
Some other candidate	8%	8%	6%	6%	24%
I would not vote	8%	2%	1%	1%	7%
Not sure	7%	6%	3%	5%	17%

Reuters/Ipsos Data

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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	33%	34%	38%	29%	30%
Ability to restore trust in American government	24%	25%	29%	20%	27%
Strong on the economy and job creation	21%	21%	10%	35%	19%
Strong on healthcare	10%	9%	12%	4%	13%
Strong on civil rights	7%	7%	9%	4%	8%
Strong on immigration	6%	5%	3%	9%	3%

Reuters/Ipsos Data

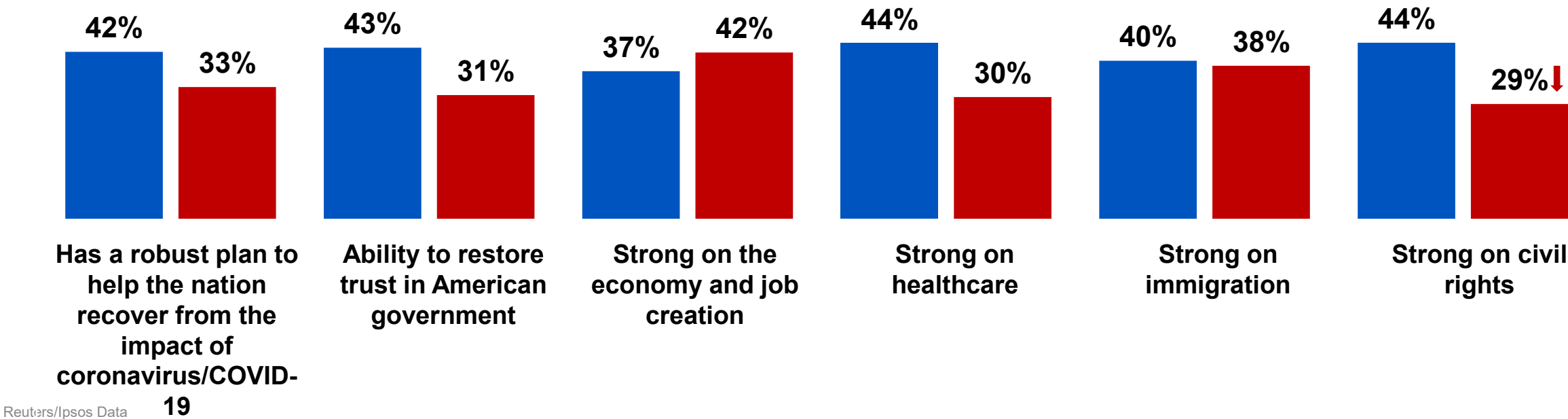© Ipsos

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

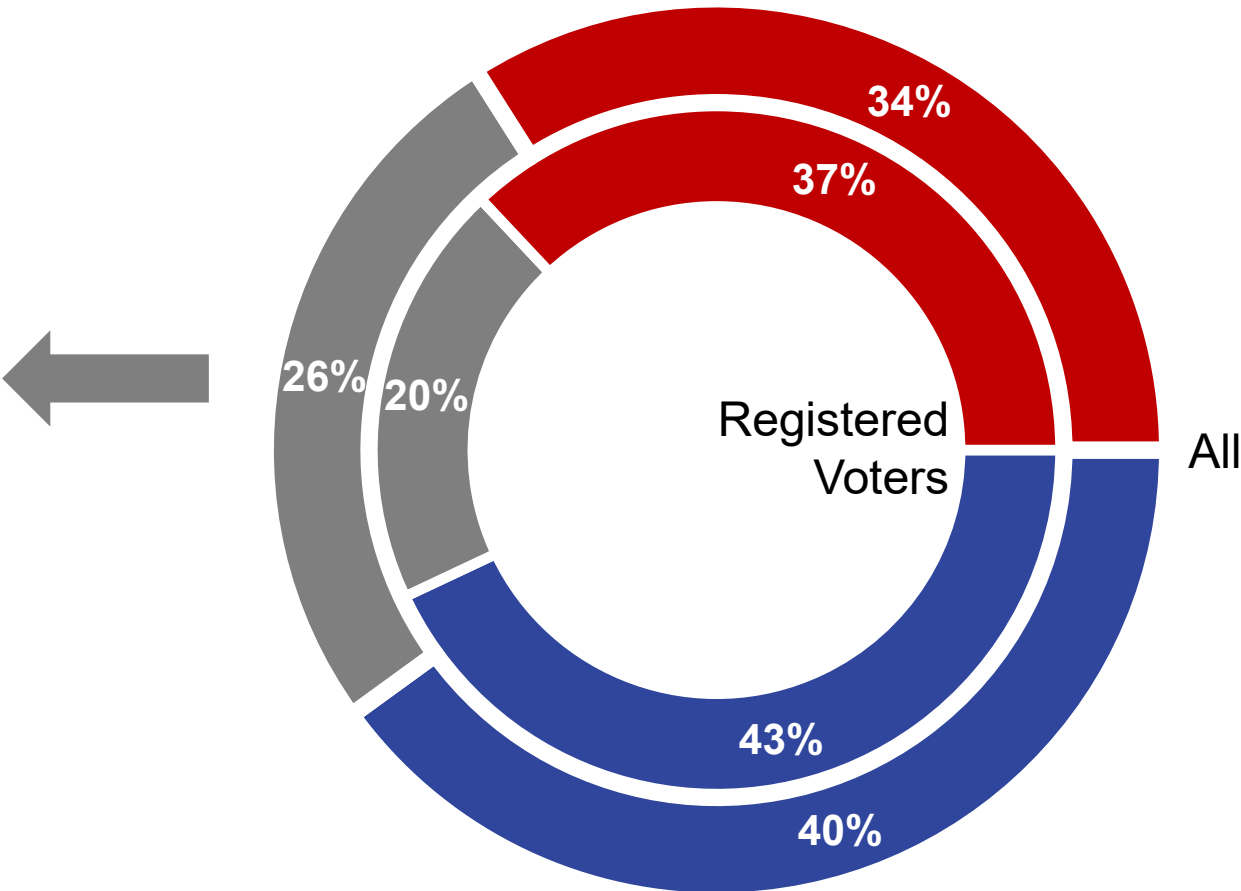|	Has a robust plan to help the nation recover from the impact of coronavirus/COVID-19	Ability to restore trust in American government	Strong on the economy and job creation	Strong on healthcare	Strong on immigration	Strong on civil rights
Joe Biden	42%	43%	37%	44%	40%	44%
Donald Trump	33%	31%	42%	30%	38%	29% ↓

Polling market averages show Biden advantage in Rust Belt, number of toss-up states remain

- ■ Biden leads
- ■ No average reported but lean Democrat
- ■ Toss-up
- ■ No average reported but lean Republican
- ■ Trump leads
- ■ No average reported

Five Thirty Eight 2020 National Polling Average, President: General Election. Updated July 7, 2020
Average only reported if state has at least five total polls or polls from at least three pollsters. All states that do not meet this criteria are displayed in gray.
State lean determined using past voting results

© Ipsos

Undecided Voters – July 2020

Undecided Voter Profile

Male	**44%**
Female	**56%**
No college degree	**73%**
College degree or more	**27%**
Millennial (Born 1982-2004)	**48%**
Gen-X (Born 1965-1981)	**29%**
Baby Boomer (Born 1946-1964)	**20%**
Silent (Born before 1946)	**2%**
White Only	**55%**
Black Only	**12%**
Hispanic	**21%**
Others	**12%**

Reuters/Ipsos data

© Ipsos

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

Undecideds   Donald Trump   Joe Biden

34%
37%
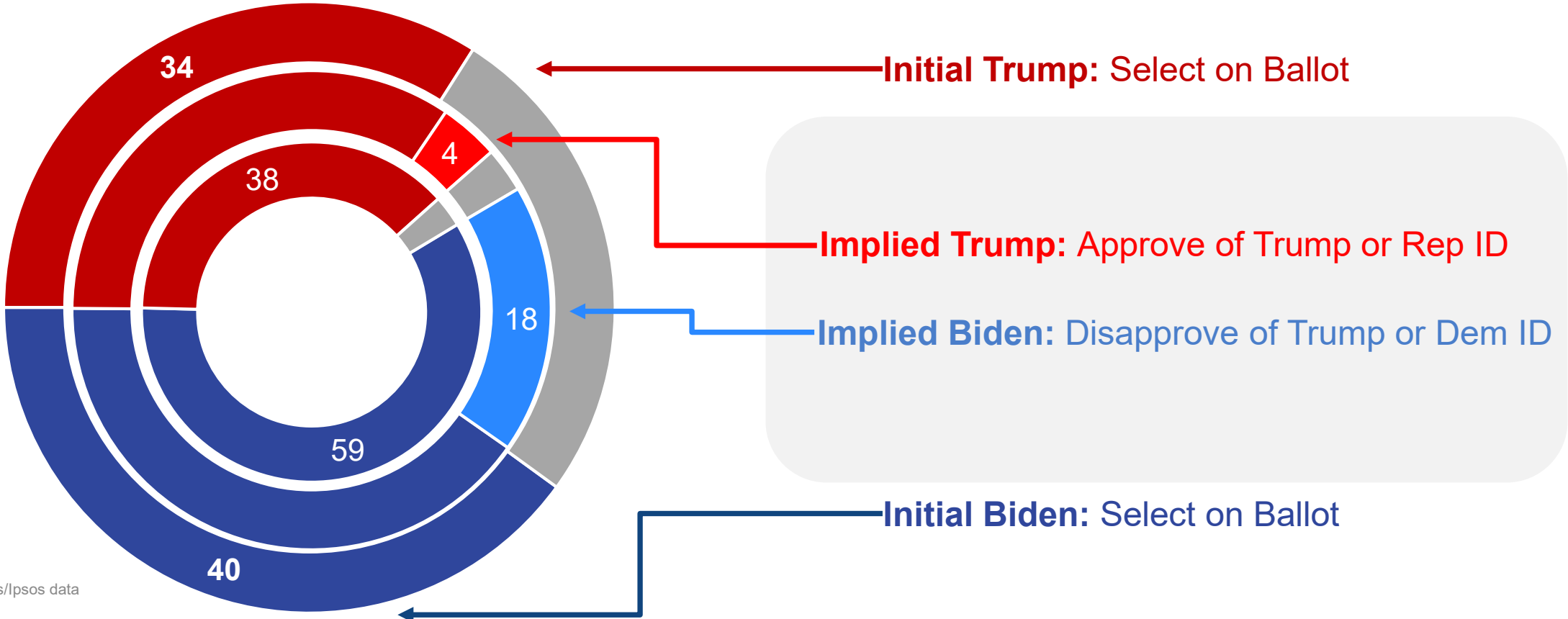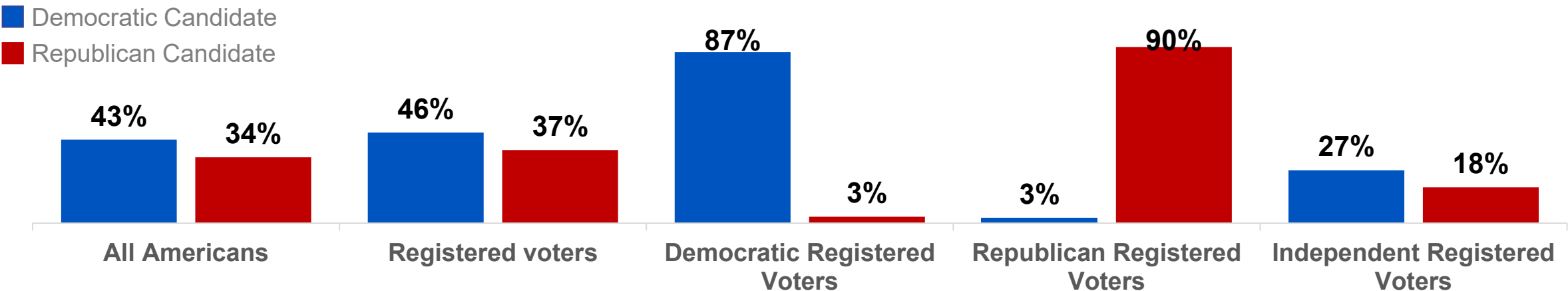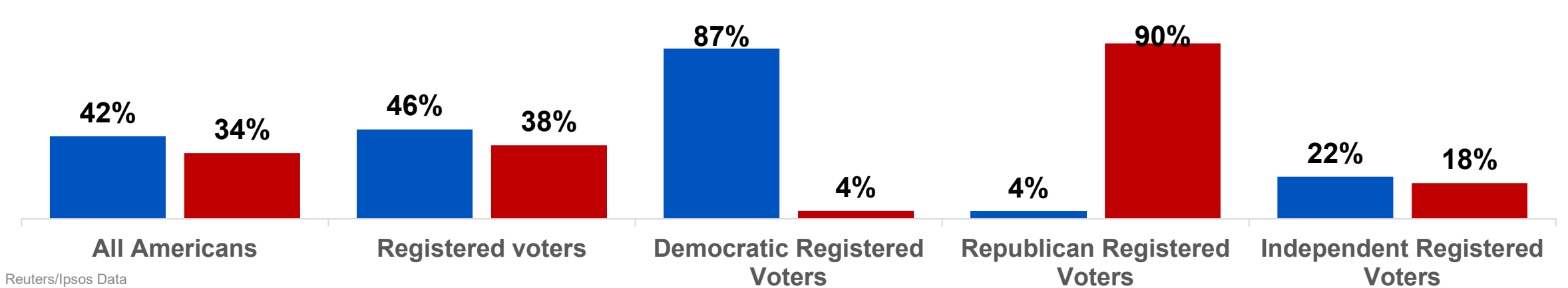26%   20%
Registered Voters
All
43%
40%

Ipsos

Undecided Voters – July 2020

Direction of the country

Right direction	Not sure	Wrong track
11%	21%	68%

Approval of Donald Trump

Approve	Not sure	Disapprove
17%	17%	67%

Political party identification

Democrat	Independents / No party / Don't know	Republican
27%	50%	23%

If you had to choose, would you support Joe Biden or Donald Trump?

Joe Biden	Donald Trump
66%	34%
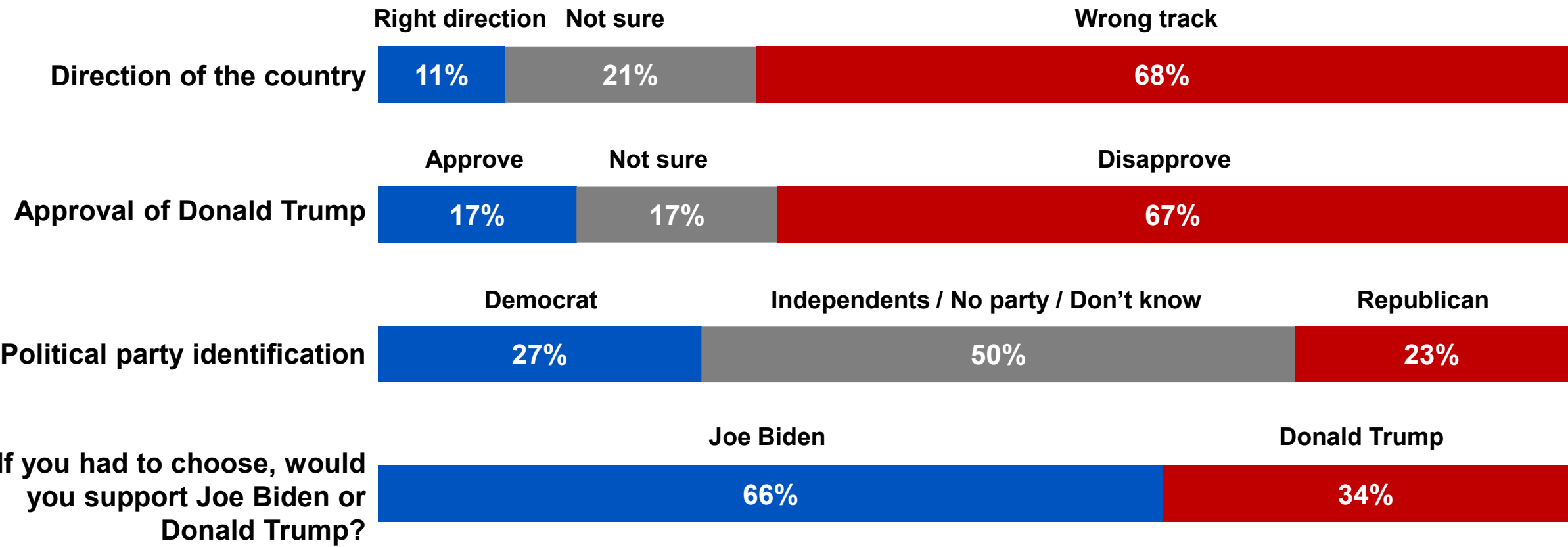
Reuters/Ipsos data

© Ipsos

Undecided Voters – July 2020

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

Initial Trump: Select on Ballot

Implied Trump: Approve of Trump or Rep ID

Implied Biden: Disapprove of Trump or Dem ID

Initial Biden: Select on Ballot

Undecided

34

38

4

18

59

40

Reuters/Ipsos data

© Ipsos

Democrats have an edge in Congressional races this year

Thinking about the elections in 2020, if the election for U.S. Congress were held today, would you vote for the Democratic candidate or the Republican candidate in your district where you live?

- ■ **Democratic Candidate**
- ■ **Republican Candidate**

	All Americans	Registered voters	Democratic Registered Voters	Republican Registered Voters	Independent Registered Voters
Democratic Candidate	43%	46%	87%	3%	27%
Republican Candidate	34%	37%	3%	90%	18%

Thinking about the elections in 2020, if the election for U.S. Senate were held today, would you vote for the Democratic candidate or the Republican candidate in your state where you live?

	All Americans	Registered voters	Democratic Registered Voters	Republican Registered Voters	Independent Registered Voters
Democratic Candidate	42%	46%	87%	4%	22%
Republican Candidate	34%	38%	4%	90%	18%

Reuters/Ipsos Data

© Ipsos

Control of Congress Driven by Presidential Results

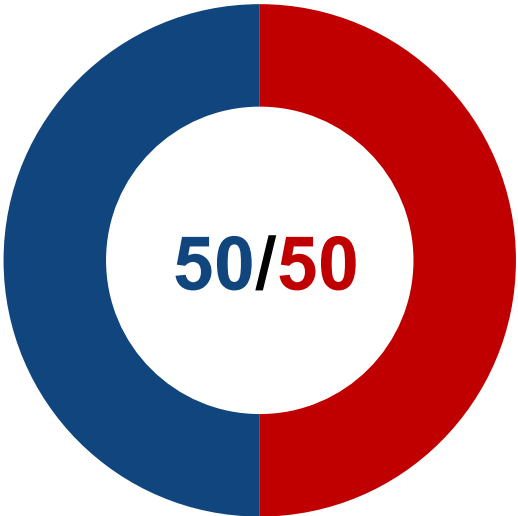## House of Representatives

Democrats currently hold 233 seats of 435. In a close election, they are likely to maintain their majority.

70/30
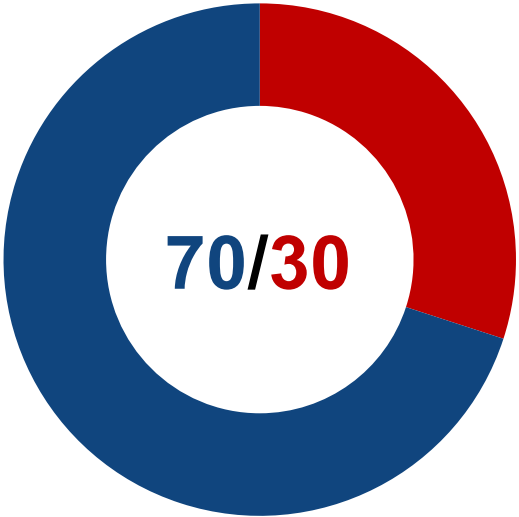
Senate

Republicans currently hold 53 seats of 100. There are currently 35 seats open that will determine the election.

50/50

■ Democrats' odds of majority ■ Republicans' odds of majority

Reuters/Ipsos data

© Ipsos

Election Forecasting

4

Base Rate Model Suggests Trump Had an Advantage

Ipsos Model of Chief Executive Odds of Election Victory

Government approval rating	Incumbent	Successor
30%	18%	9%
35%	38%	2%
40%	55%	6%
45%	78%	14%
50%	90%	28%
55%	96%	49%
60%	98%	71%

Job Approval: February 2020 (43%) →

Source: Ipsos presidential election model

© Ipsos

But an Eventful Election Year Had Damaged Those Odds...
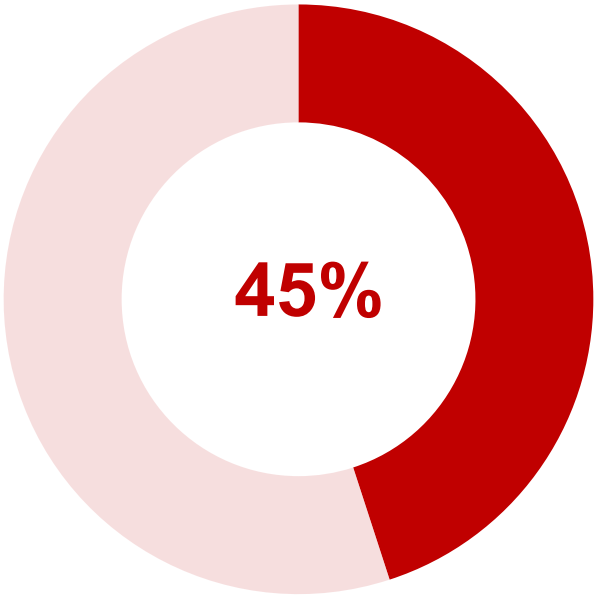
President Trump's Odds of General Election Victory

Feb 2020

60%

Approval: 43%

COVID

ECONOMY

BLM

July 2020

45%
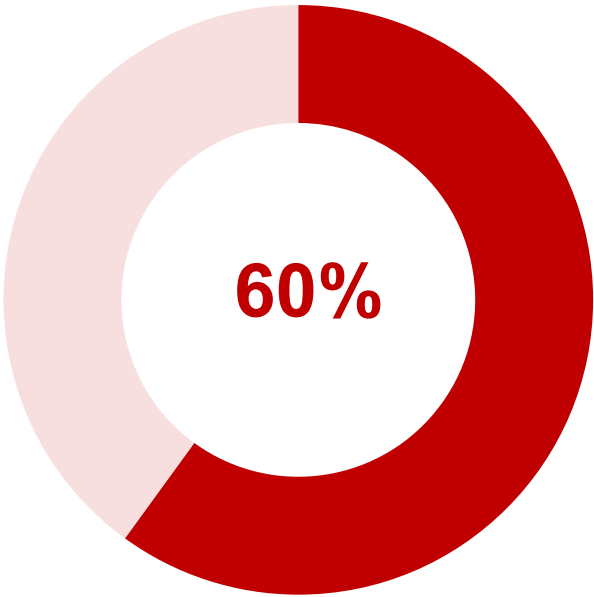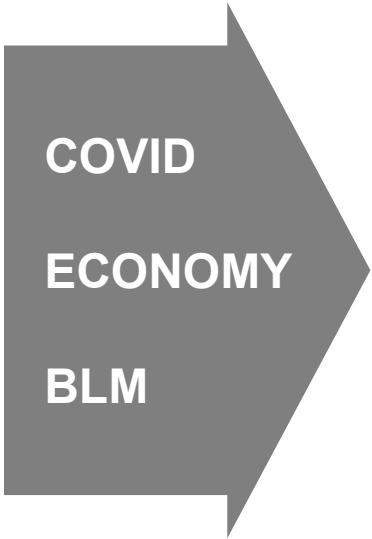
Approval: 38%

Source: Ipsos presidential election model

Main Issue in Voting

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?
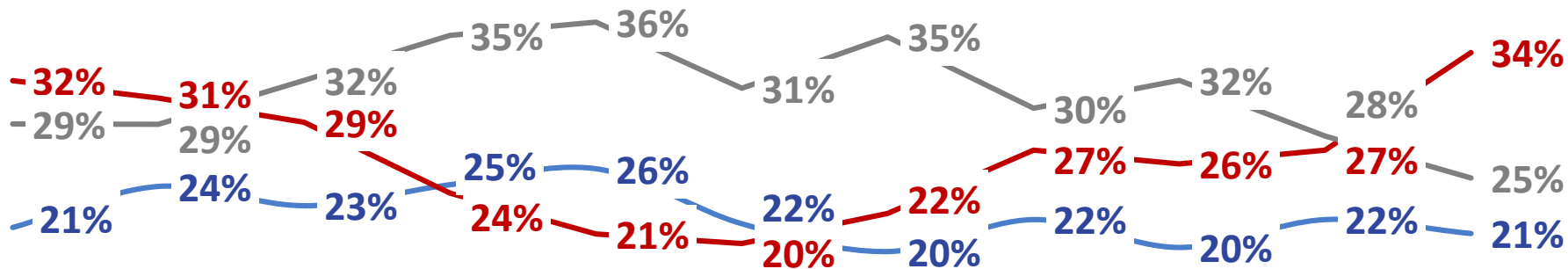
- 🟦 Strong on the economy and job creation
- 🟥 Has a robust plan to help the nation recover from coronavirus
- ⬜ Ability to restore trust in American government

Current Leader on Issue

Biden +9

Biden +13

Trump +4

32% 31% 29%
29% 29% 32% 35% 36% 31% 35% 30% 32% 28% 34%
21% 24% 23% 25% 26% 24% 22% 22% 27% 26% 27% 25%
21% 20% 20% 22% 20% 22% 21%

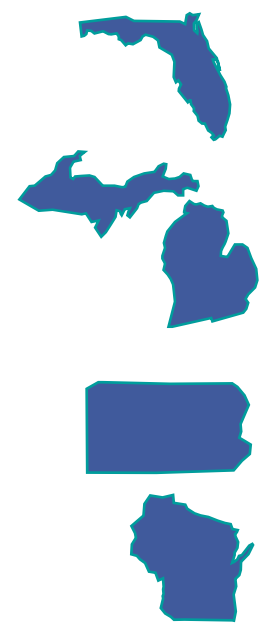*In 85% of elections around the world, the candidate seen as most credible on the main issues wins.*

April 13-14   May 4-5   May 20-27   June 1-2   June 8-9   June 10-16   June 22-23   June 29-30   July 6-7   July 13-14   July 15-21

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Polls Show Biden Strong in Swing States, but Trump Remains More Popular Than Nationwide

State	538 Polling Average	State Trump Approval (late June)	Base Rate Model Probabilities
Florida	Biden +8	43%	Trump 70%
Michigan	Biden +9	43%	Trump 70%
Pennsylvania	Biden +9	41%	Trump 60%
Wisconsin	Biden +9	41%	Trump 60%

Ipsos Projection of Reuters/Ipsos Core Political data
Five Thirty Eight 2020 National Polling Average, President: General Election. Updated July 8, 2020

Summary Judgement: Biden Slight Favorite

Source	Finding	Stand-alone odds (Trump)
Base rate model - national	Falling approval rate puts Trump underwater	45%
Base rate model - state	Trump remains stronger in key swing states	60%
Main problem heuristic	Biden preferred on covid and restoring trust	40%
Election poll – national	Trump trails substantially in national polls	35%
Election poll - state	Trump lagging in key swing state polling	40%

AVERAGE OF SOURCE PROJECTIONS

Summary judgement	Biden slight favorite	43%

Source: Ipsos analysis

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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?

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Game Changers

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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.