Welcome to our webinar!

Today's presenter: 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

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AGENDA

1. CONTEXT

2. PERCEPTIONS OF DONALD TRUMP

3. GENERAL ELECTION

4. ELECTION LEGITIMACY

5. QUESTIONS

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CONTEXT

1

Chaotic News Cycles

The top political news topic each day for the last month

|																									
Potential Biden Blowout	Portland Protests	Trump headwinds 100 days out	Why Harris Isn't a Lock for VP	Trump's Favorite Doctor	Louis Gohmert Tests Positive	Herman Cain Dies from COVID	Postal Service Backlogs	Georgia Summer Camp Hotspot	Trump Nomination to be Private	Microsoft to Purchase TikTok	Census Stops Count Early	Biden's Massive Ad Plans	Stimulus Talks Break Down	Crowded GA School/TikTik Ban	Biden Camp Prebut Sexists Attacks	Trump Executive Orders on Stimulus	Jimmy Lai Arrested in HK	Biden VP Pick Said to be Imminent	Biden Pick Harris for VP	Kamala Harris as Dem VP	USPS Warns Ballots Will be Late	Trump's Assault on the USPS	Robert Trump Dies	Congress Called Back for USPS	DNC First Night / Michelle Obama	Democrats Nominate Biden

| 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 |

July | August

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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

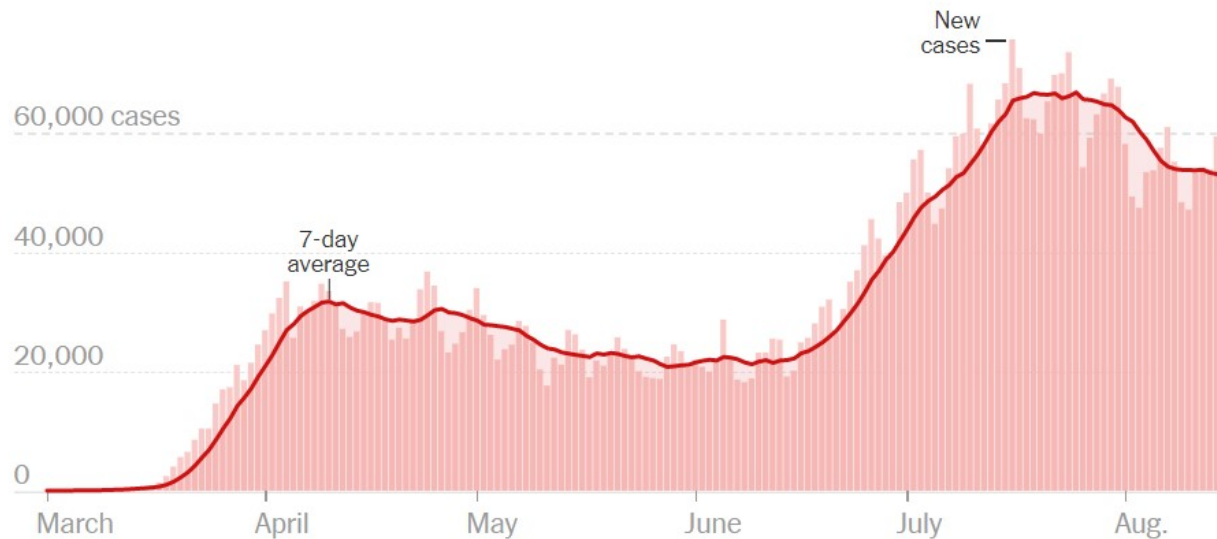|	January 2012	December 2019	March 2020	May 2020	July 2020	August 2020
Healthcare	6%	18%	28%	20%	19%	18%
Economy + Jobs	65%	16%	20%	35%	27%	30%
Immigration	3%	15%	9%	6%	5%	5%
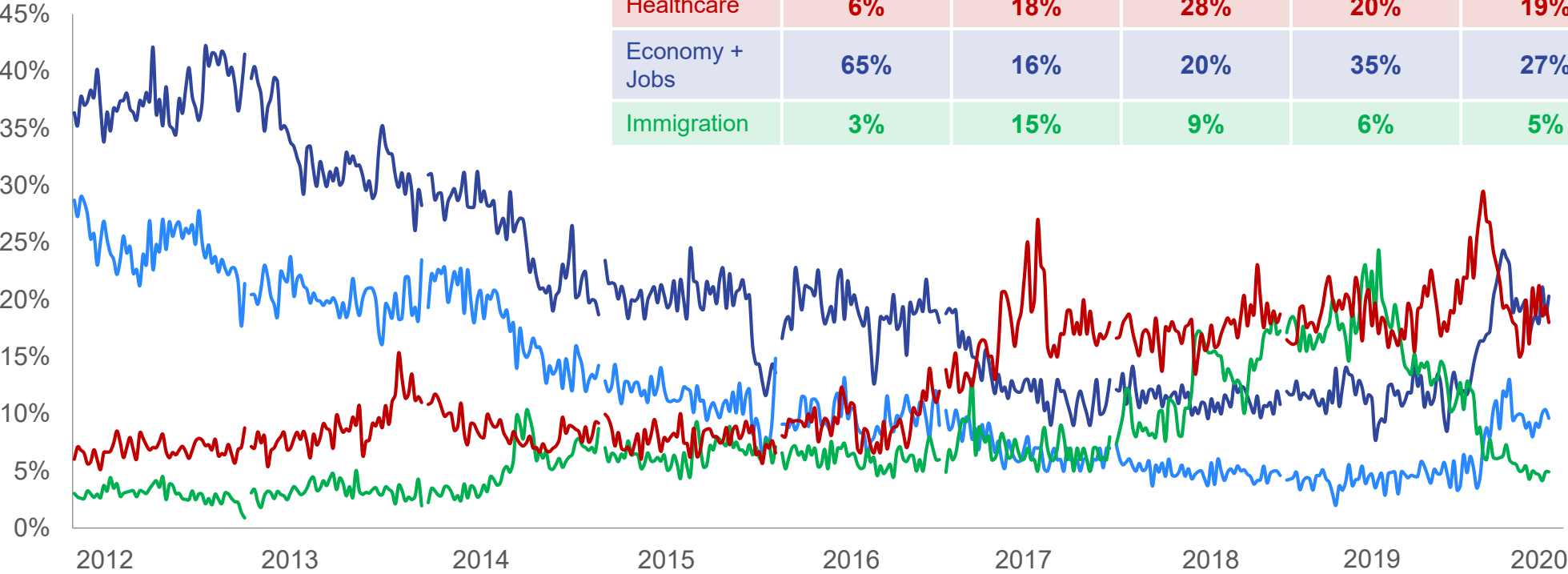
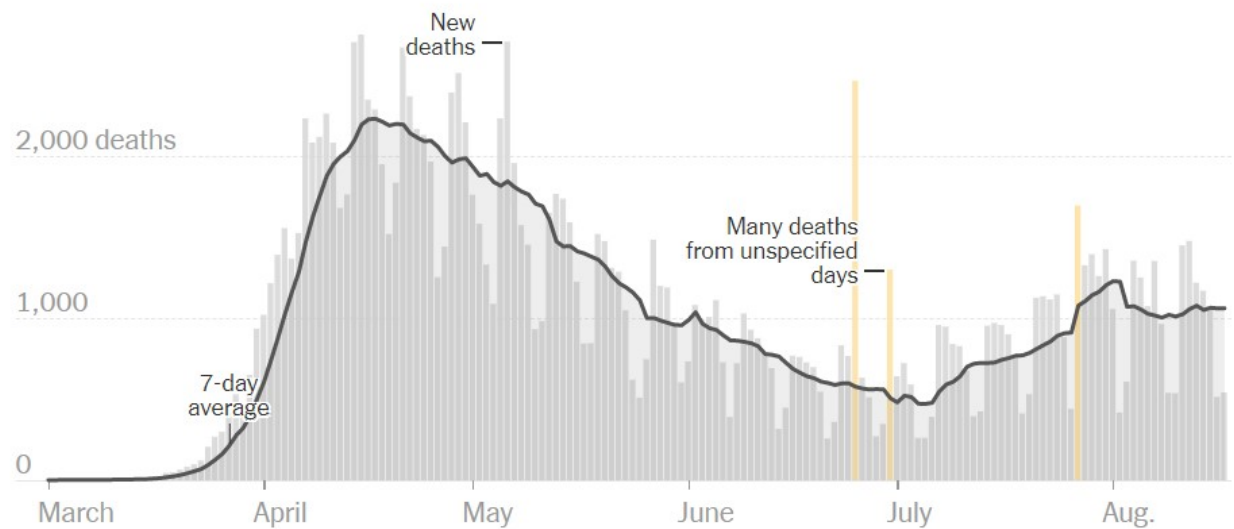About 1 in 10 are volunteering 'coronavirus'

Reuters/Ipsos Data

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Reports of new cases are stabilizing at high rate

+5.5 million confirmed cases, +170,000 deaths

New reported cases by day in the United States

New cases —

60,000 cases

40,000

7-day
average

20,000

0

March   April   May   June   July   Aug.

New reported deaths by day in the United States

New
deaths —

2,000 deaths

Many deaths
from unspecified
days —

1,000

7-day
average

0

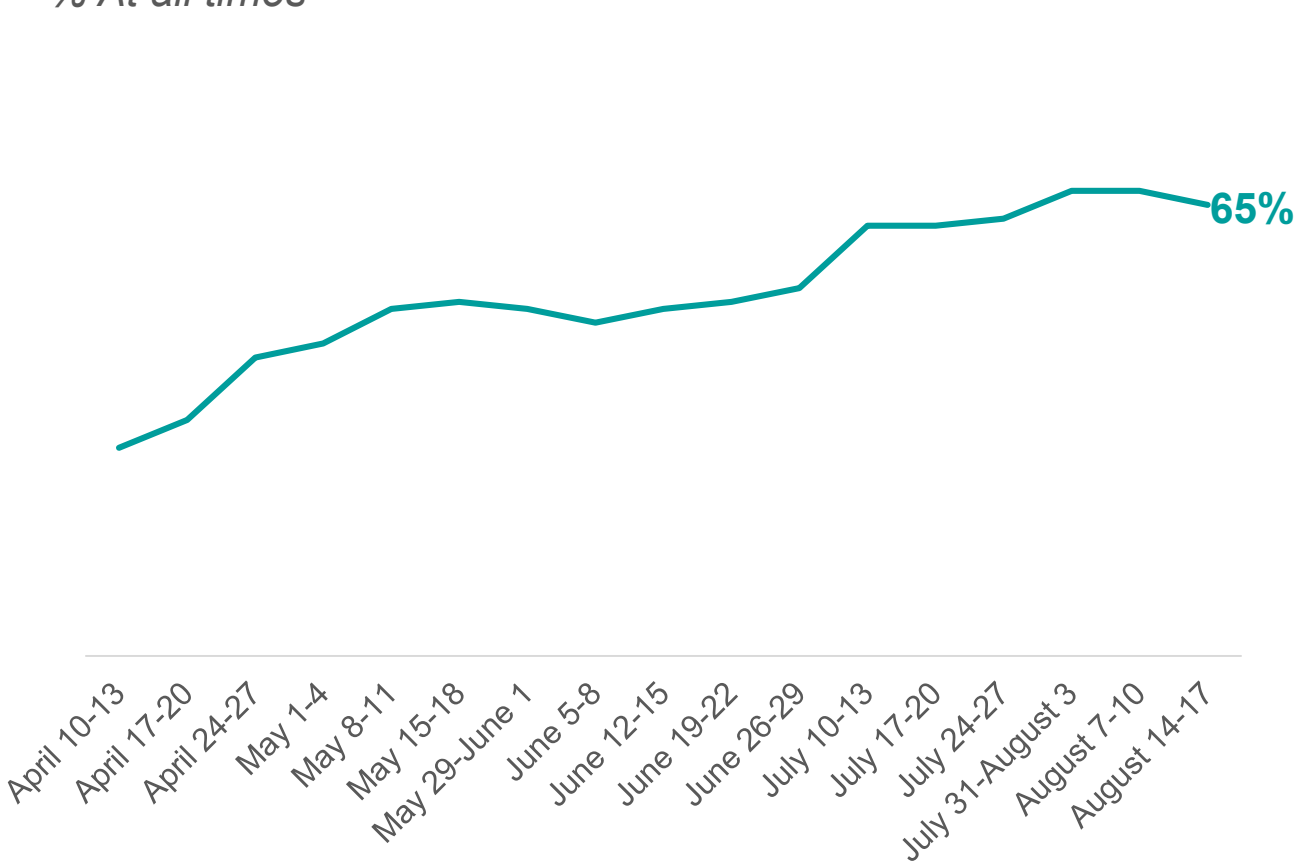March   April   May   June   July   Aug.

Source:New York Times

Mask usage has leveled off; Less than half of Republican comply

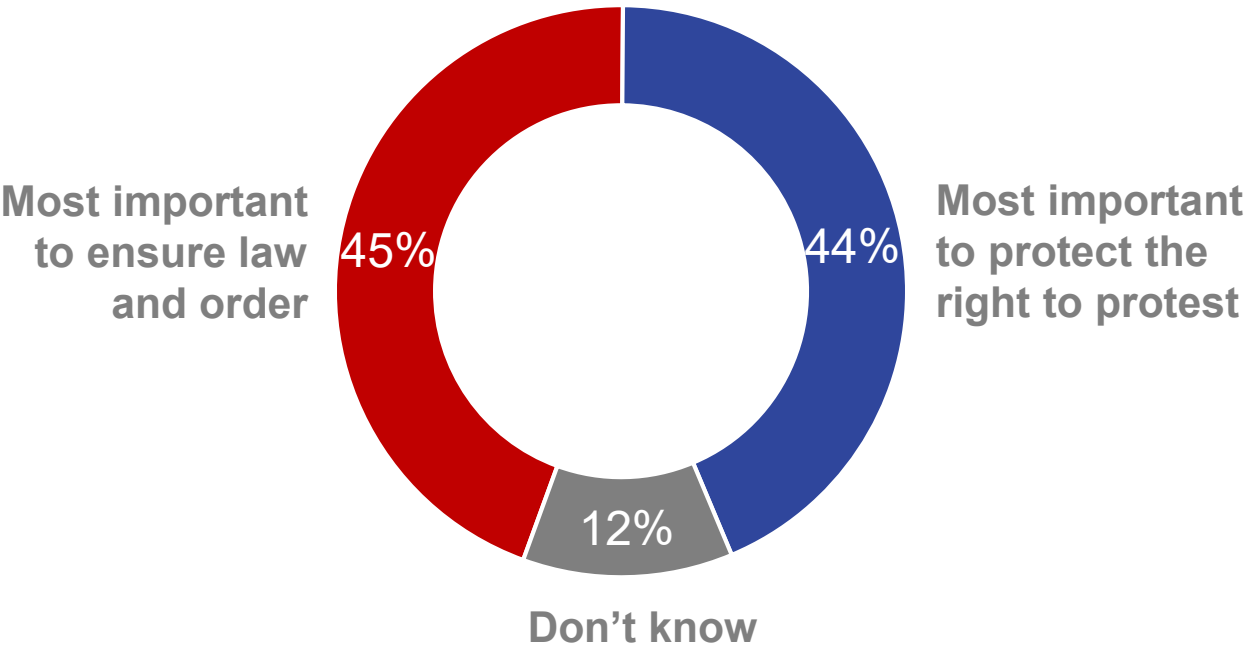**When you leave your home, are you wearing a mask?**
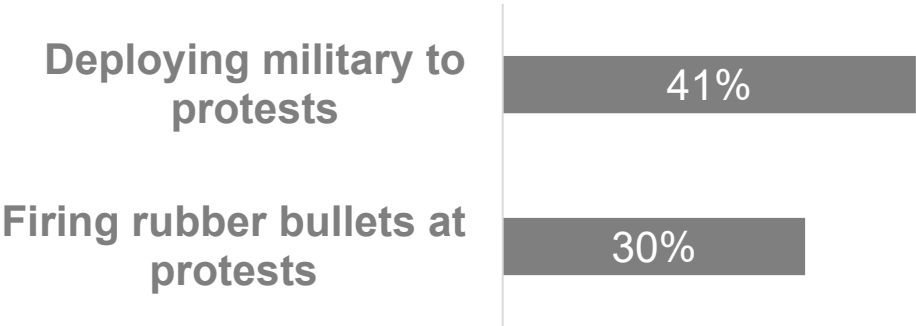
% At all times

August 14-17, 2020

65%

Category	Percentage
Male	58%
Female	72%
Democrat	83%
Republican	48%
White	59%
Black	82%
Hispanic	74%
18-29	67%
30-49	58%
50-64	63%
65+	76%

X-axis (line chart): 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, June 26-29, July 10-13, July 17-20, July 24-27, July 31-August 3, August 7-10, August 14-17

Axios/Ipsos Coronavirus Index

Ipsos
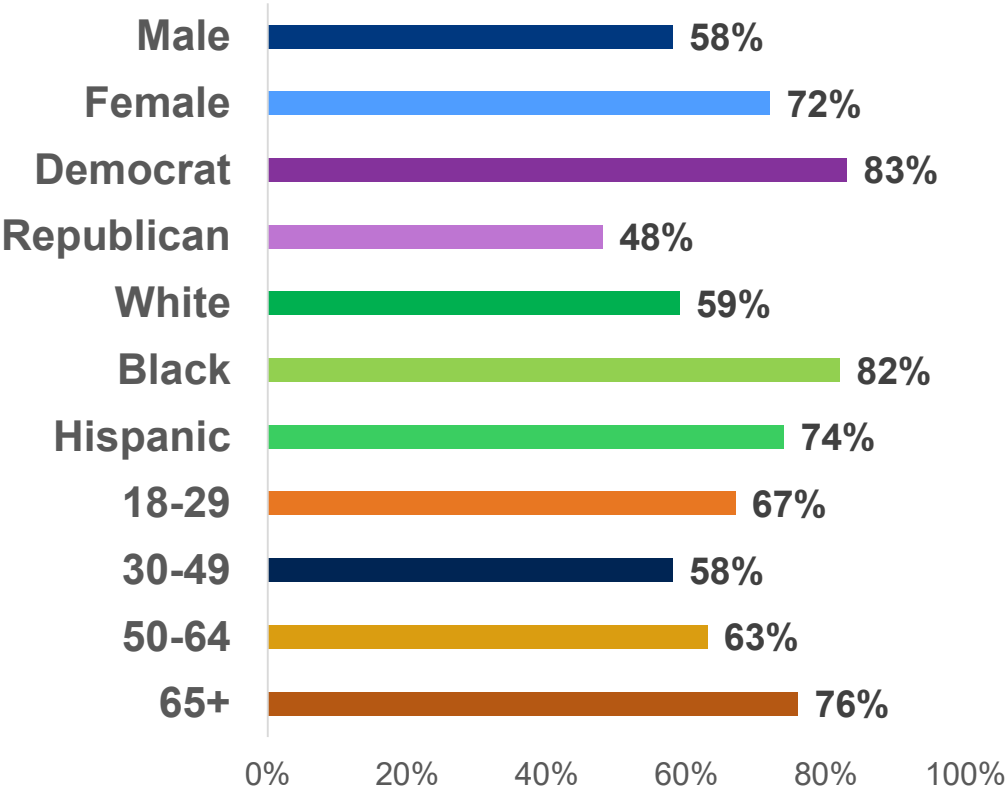
Protests vs. Law & Order Have Been Mixed Bag

Which comes closer to your view?

Most important to ensure law and order **45%**

Most important to protect the right to protest **44%**

12% Don't know

Do You Support…

Deploying military to protests	41%
Firing rubber bullets at protests	30%

Are Federal Agents Being Sent To Portland to…

Ensure law and order	Further Trump's agenda	Don't know
39%	42%	19%
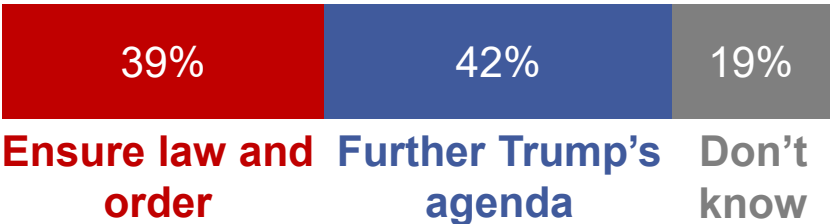
Three-quarters say USPS is vital for the election; Most use postal service

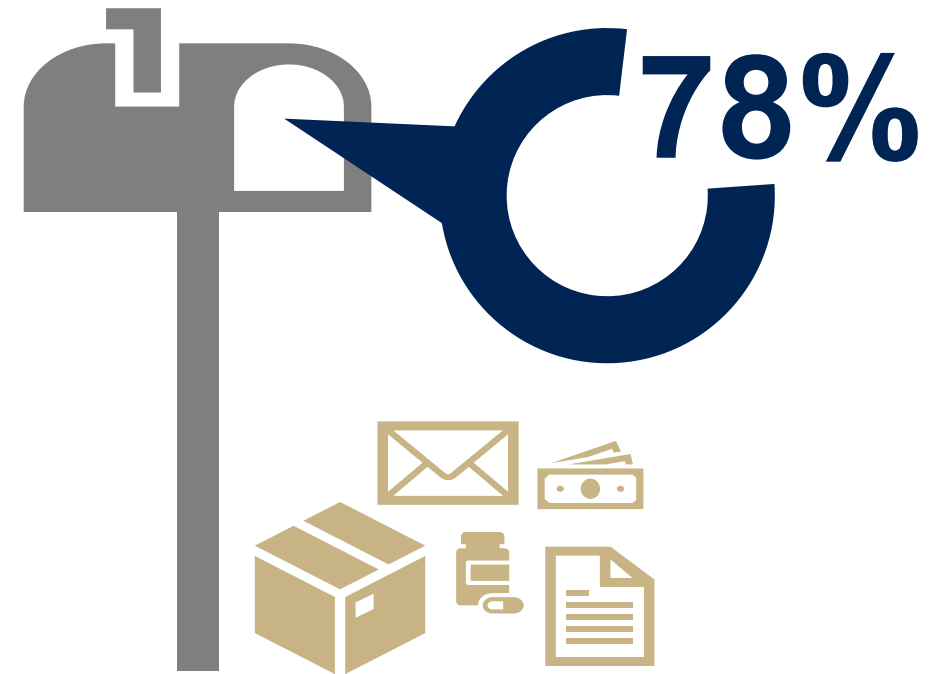**Have you received any of the following through the U.S. Postal Service in the last week?**
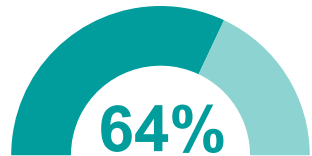
64%
Expected to receive a **package** via USPS

19%
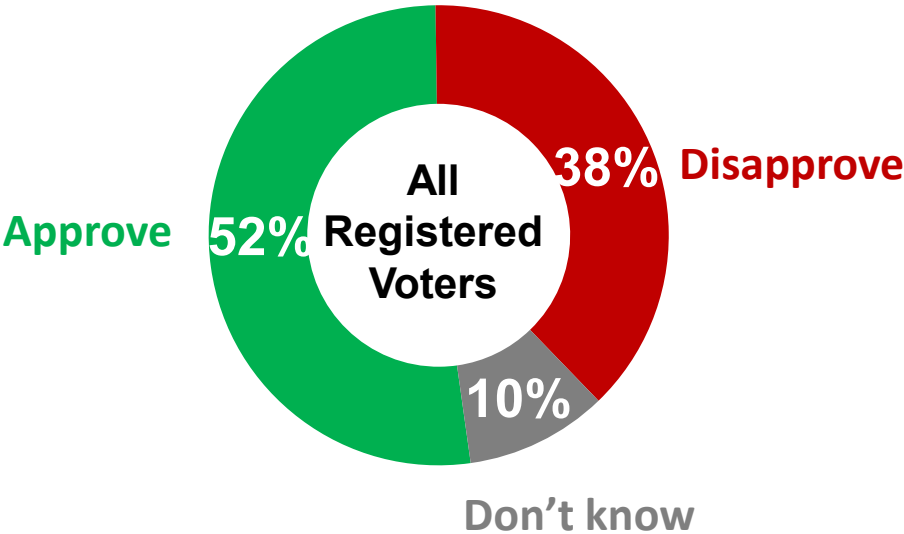Expected to receive **medication** via USPS

Majority agree: a well-functioning United States Postal Service is important to having a smooth and successful election during the coronavirus pandemic
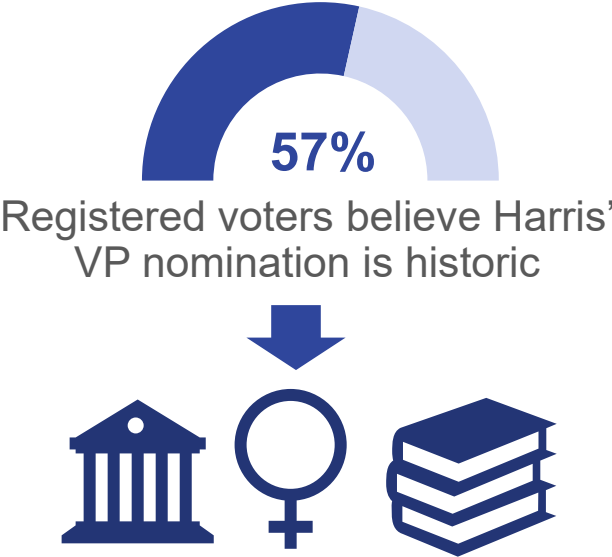
78%

Kamala Harris Positively Received

Do you approve or disapprove of Biden's selection of Kamala Harris?

Approve **52%**
38% **Disapprove**
10%
Don't know

All Registered Voters

Is the choice of Kamala Harris a milestone for the United States?

57%
Registered voters believe Harris' VP nomination is historic

Democratic Convention Producing A Few Breakthrough Moments
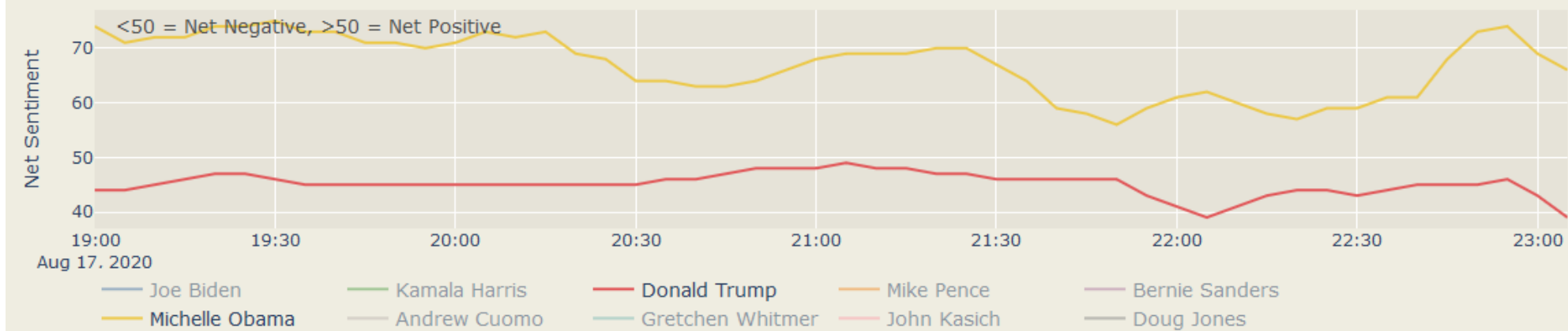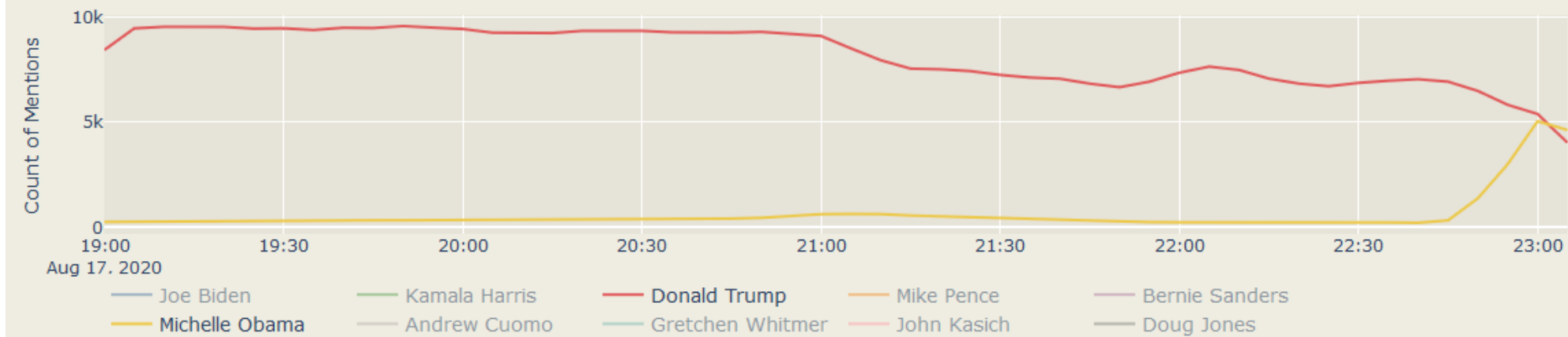
Perceptions of Donald Trump

2

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

56%

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 | July 6-7, 2020 | July 15-21, 2020 | August 3-4, 2020 | August 14-18, 2020
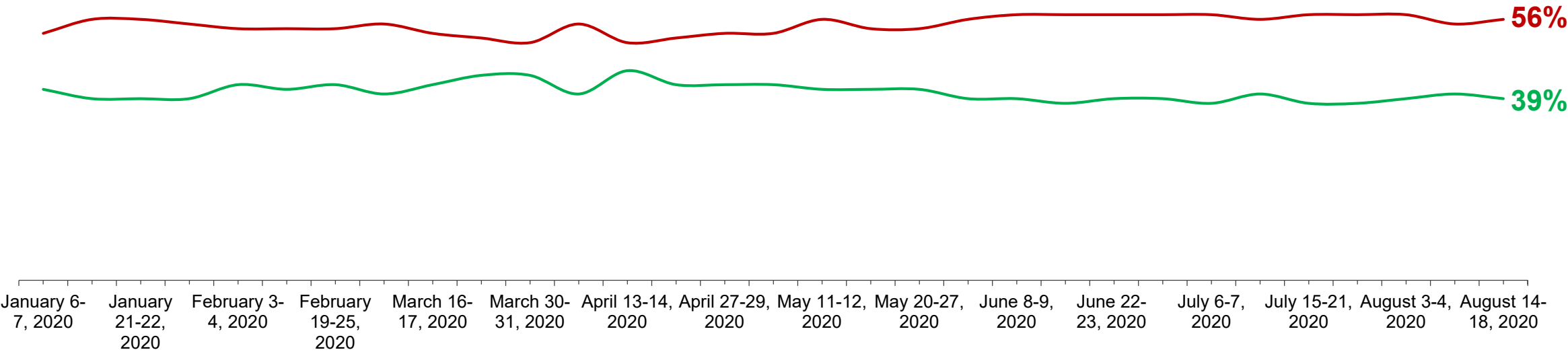
Reuters/Ipsos Data

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President Trump's approval rating by state

56 or more

50-55

45-49

40-44

35-39

30-34

29 or less
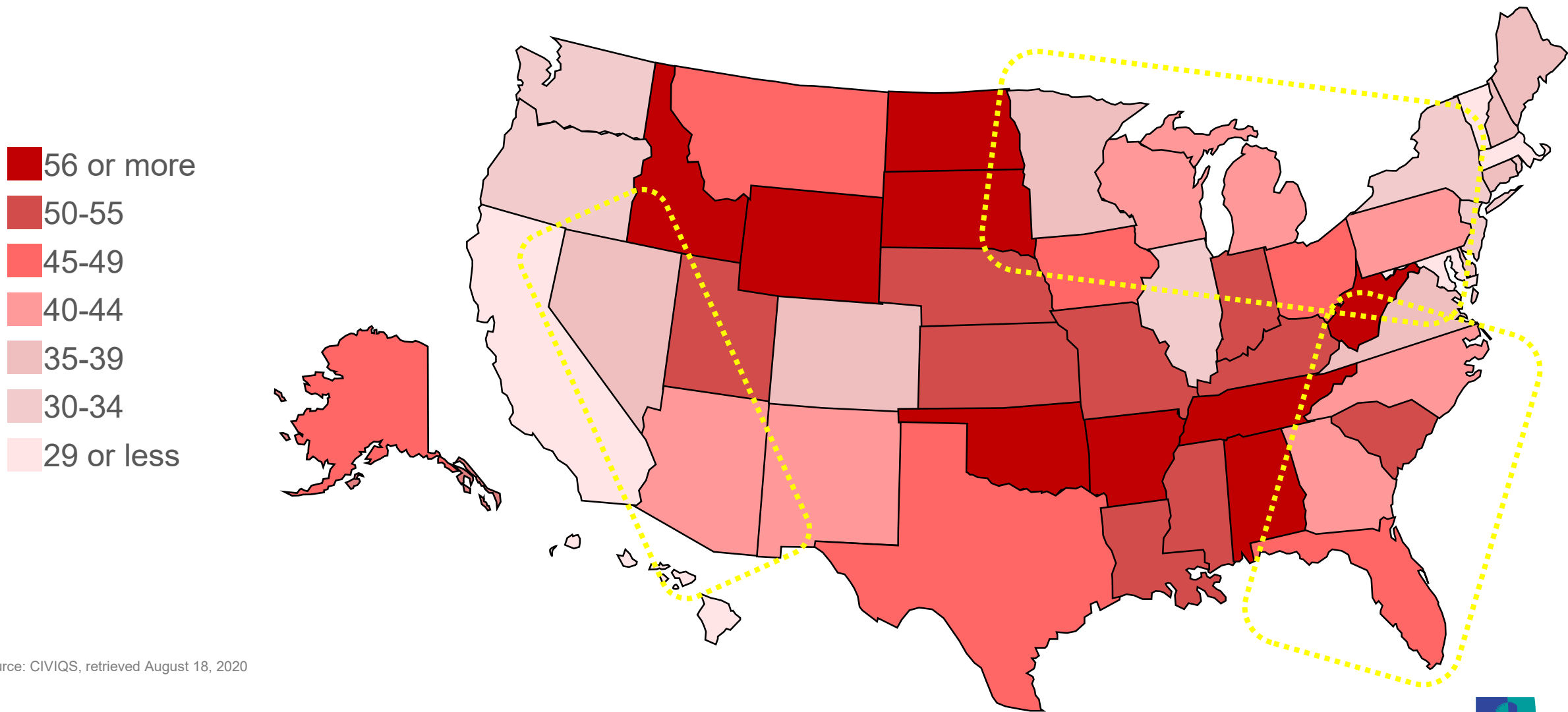
Source: CIVIQS, retrieved August 18, 2020

General Election

3

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Presidential Ballot Trend – Registered Voters

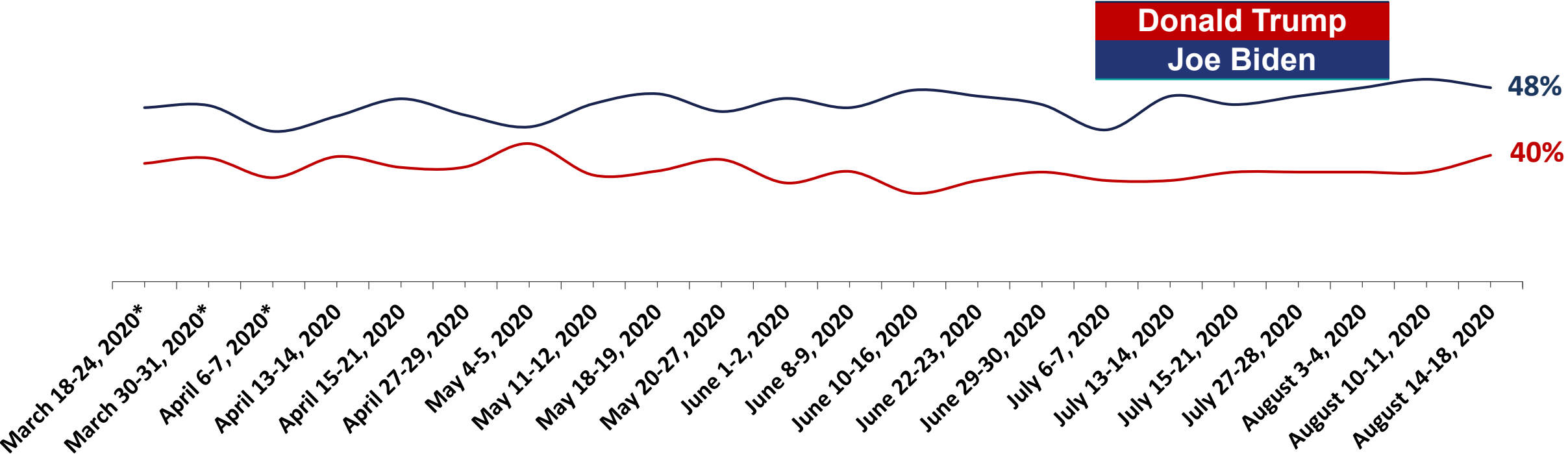If the 2020 presidential election were held today, would you vote for Donald Trump or Joe Biden? *Order of candidates is randomly rotated in question text*

| Donald Trump |
| Joe Biden |

48%

40%

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
July 27-28, 2020
August 3-4, 2020
August 10-11, 2020
August 14-18, 2020

Reuters/Ipsos Data

*"If the 2020 presidential election were being held today and the candidates were as below, for whom would you vote?" Question text from March 18-April 7, 2020
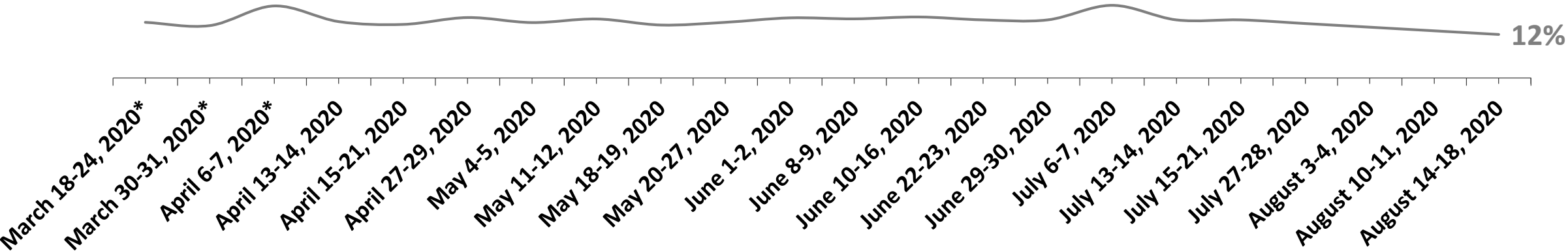
© Ipsos

Undecided Voters Trend – Registered Voters

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*

Undecided Registered Voters

12%

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 | July 27-28, 2020 | August 3-4, 2020 | August 10-11, 2020 | August 14-18, 2020

Reuters/Ipsos Data

*"If the 2020 presidential election were being held today and the candidates were as below, for whom would you vote?" Question text from March 18-April 7, 2020

© Ipsos

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*
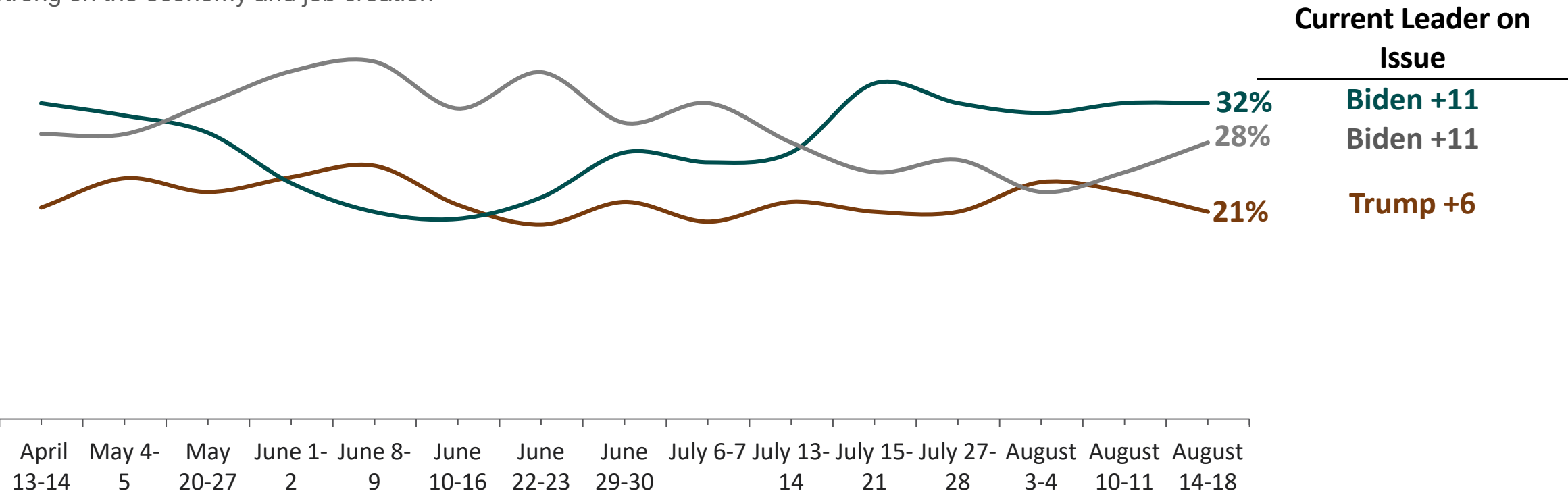
	All Adults	Registered Voters	Democratic Registered Voters	Republican Registered Voters	Independent Registered Voters
Donald Trump	36%	40%	5%	85%	28%
Joe Biden	45%	48%	87%	8%	38%
Some other candidate	6%	5%	3%	5%	14%
I would not vote	7%	1%	1%	0%	3%
Not sure	6%	5%	4%	3%	16%

Reuters/Ipsos Data

© Ipsos

# Biden and Trump's performance on key issues

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?

■ Has a robust plan to help the nation recover from coronavirus
■ Ability to restore trust in American government
■ Strong on the economy and job creation

Current Leader on Issue

32% — **Biden +11**
28% — **Biden +11**
21% — **Trump +6**

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 | July 27-28 | August 3-4 | August 10-11 | August 14-18

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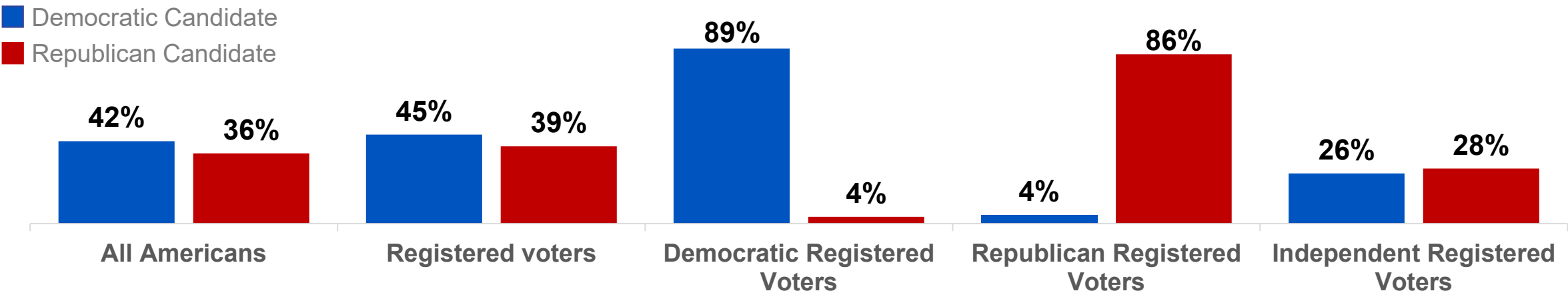
Biden leads

No polls, likely Democrat

Toss-up

No polls, likely Republican
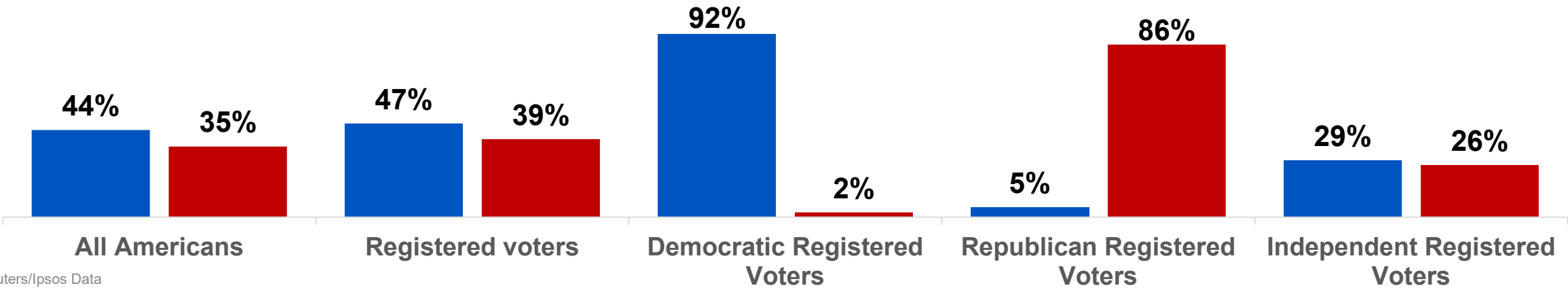
Trump leads
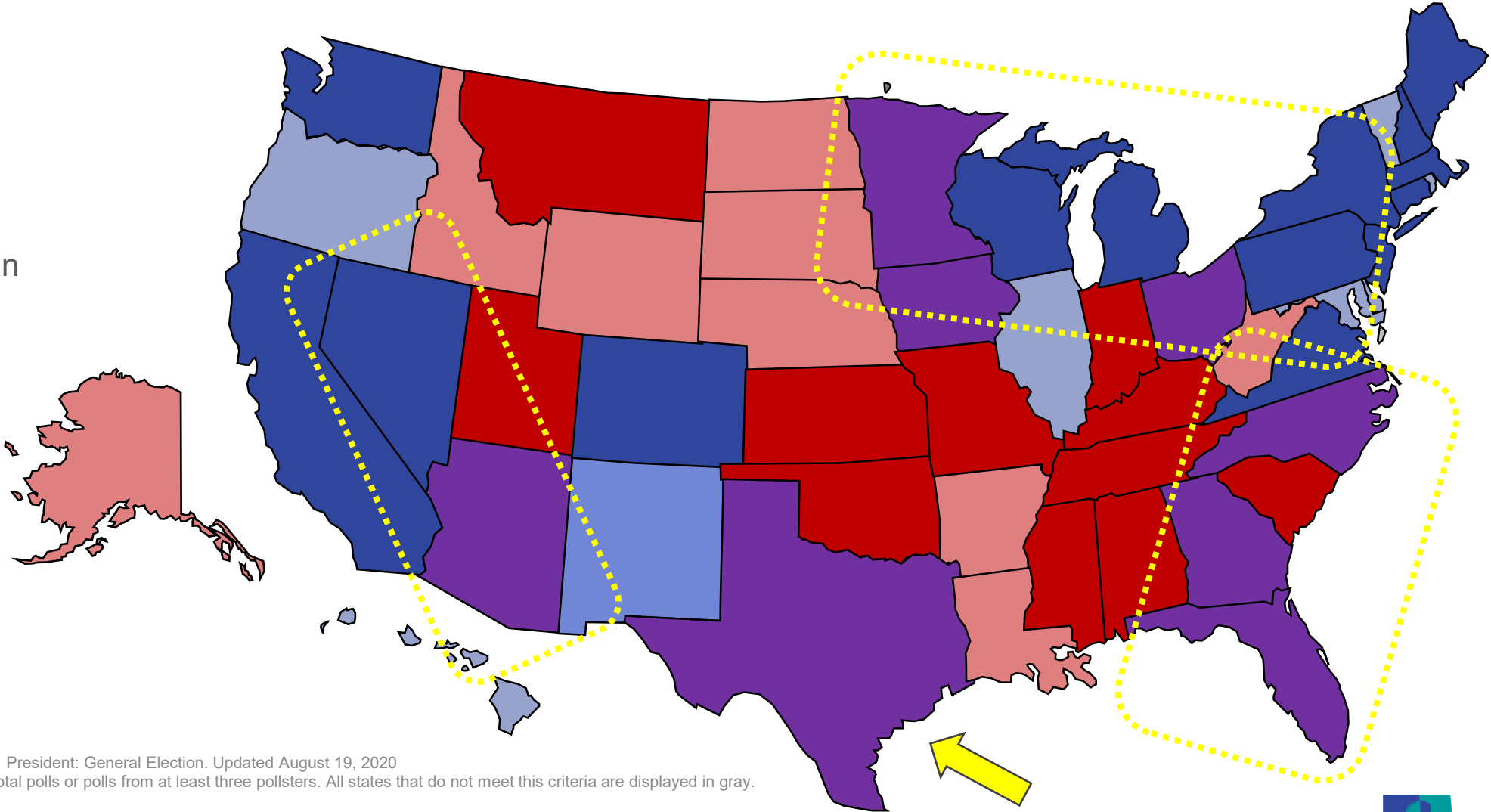
Five Thirty Eight 2020 National Polling Average, President: General Election. Updated August 19, 2020
Average only reported if state has at least five total polls or polls from at least three pollsters. All states that do not meet this criteria are displayed in gray.
State lean determined using past voting results

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	42%	45%	89%	4%	26%
Republican Candidate	36%	39%	4%	86%	28%

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	44%	47%	92%	5%	29%
Republican Candidate	35%	39%	2%	86%	26%

Reuters/Ipsos Data
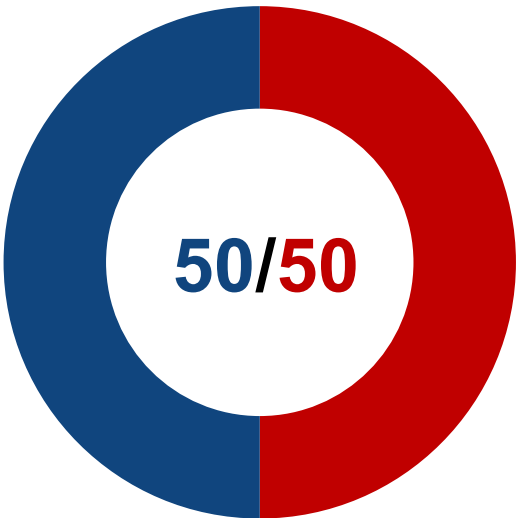
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Control of Congress driven by presidential results

House of Representatives

Democrats currently hold 232 seats of 435. In a close election, they are likely to maintain their majority.

70/30
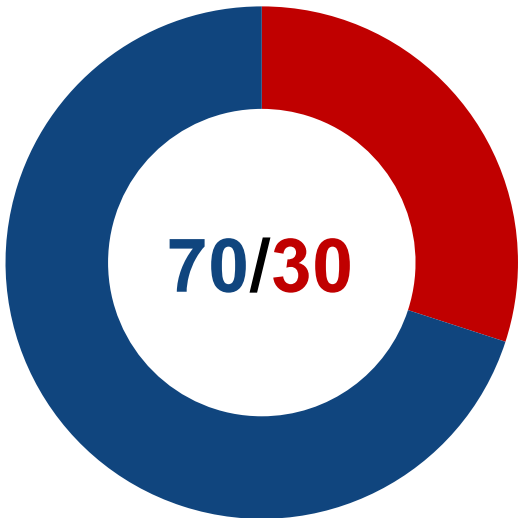
Senate

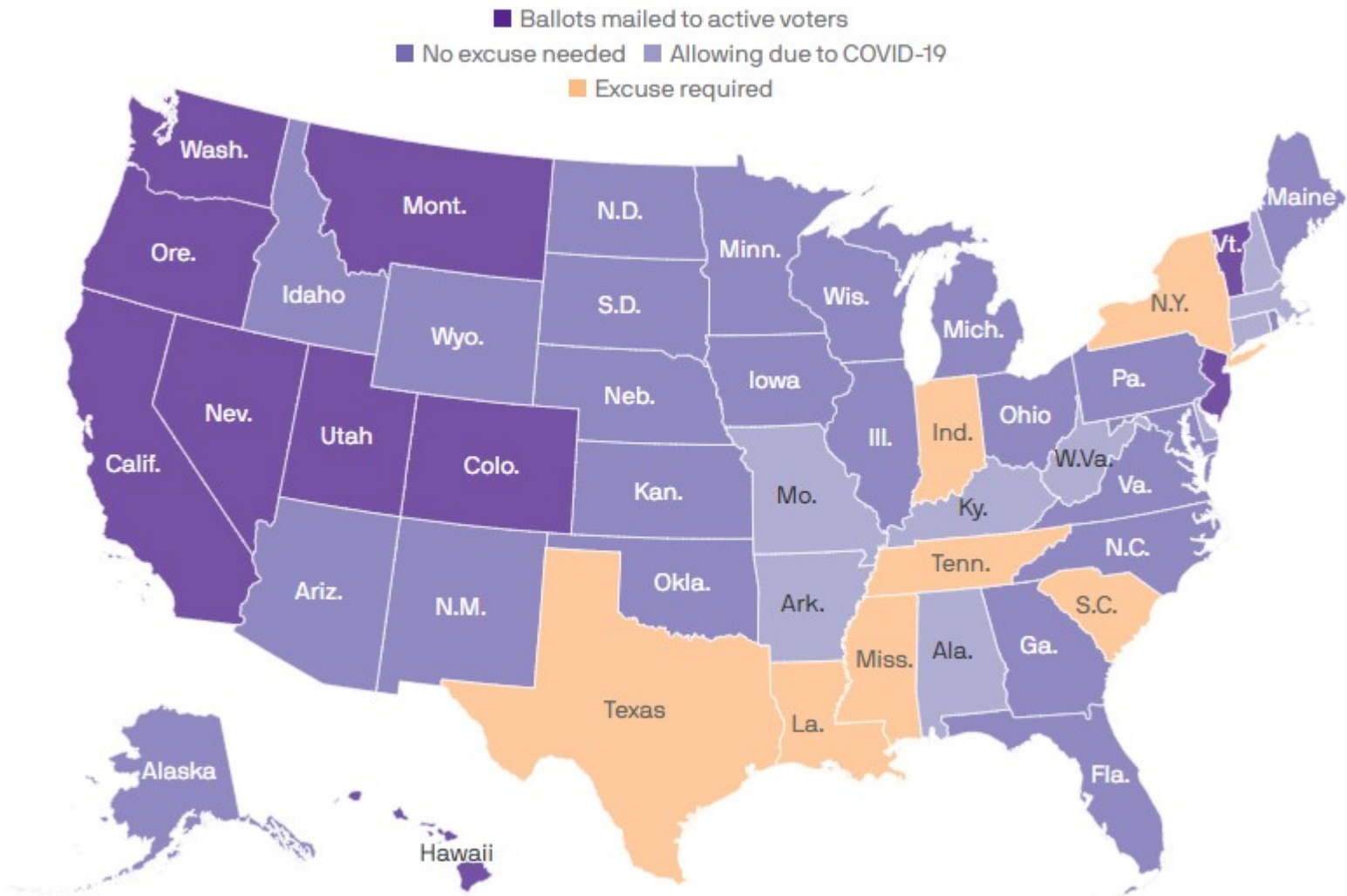Republicans currently hold 53 seats of 100. There are currently 35 seats open that will determine the election.

50/50

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

Reuters/Ipsos Data

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Election Legitimacy

4

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Vote by mail rules across the country

7 states are still requiring an excuse to go to the polls

Ballots mailed to active voters
No excuse needed · **Allowing due to COVID-19**
Excuse required
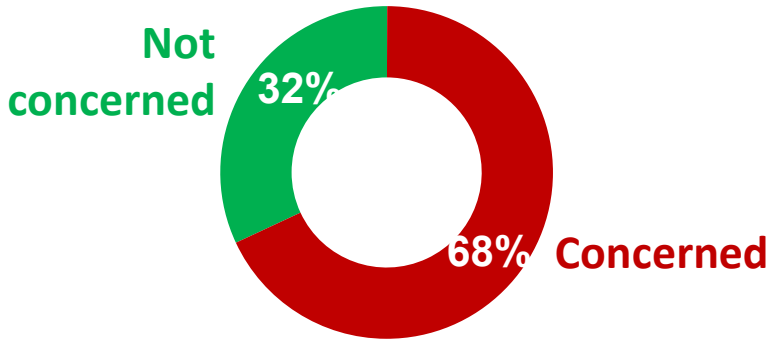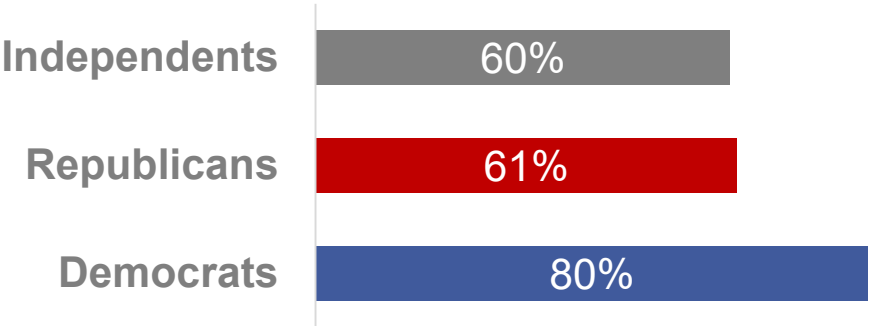
Voting Starts
September 4!!!

Widespread concerns about election integrity

How concerned are you about the following?

Total Concerned
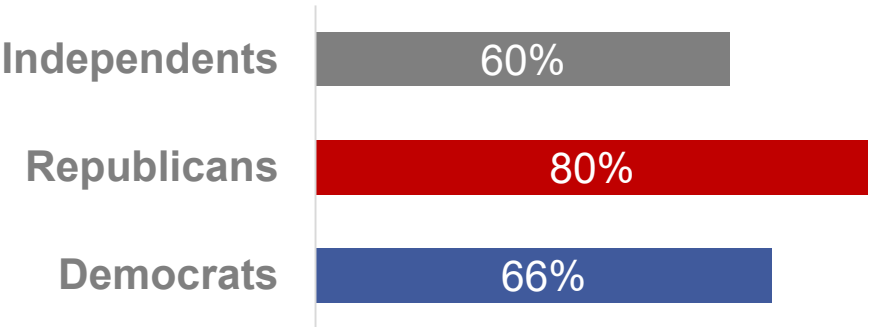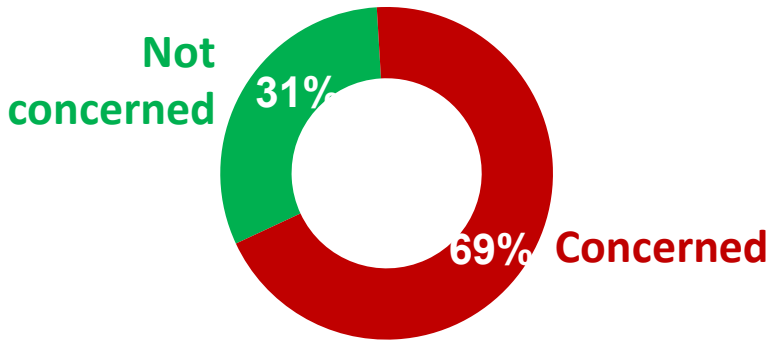
Voter Suppression

Not concerned **32%**

68% Concerned

Independents	60%
Republicans	61%
Democrats	80%

Organized Voter Fraud

Not concerned **31%**

69% Concerned

Independents	60%
Republicans	80%
Democrats	66%

Reuters/Ipsos data

Ipsos
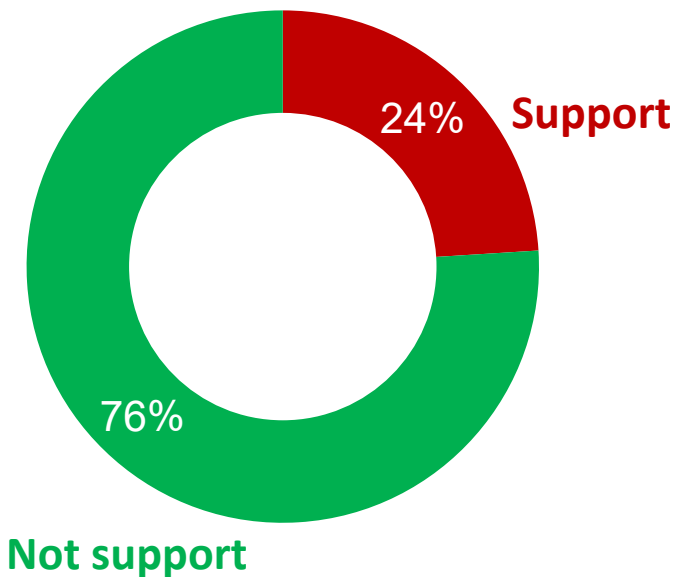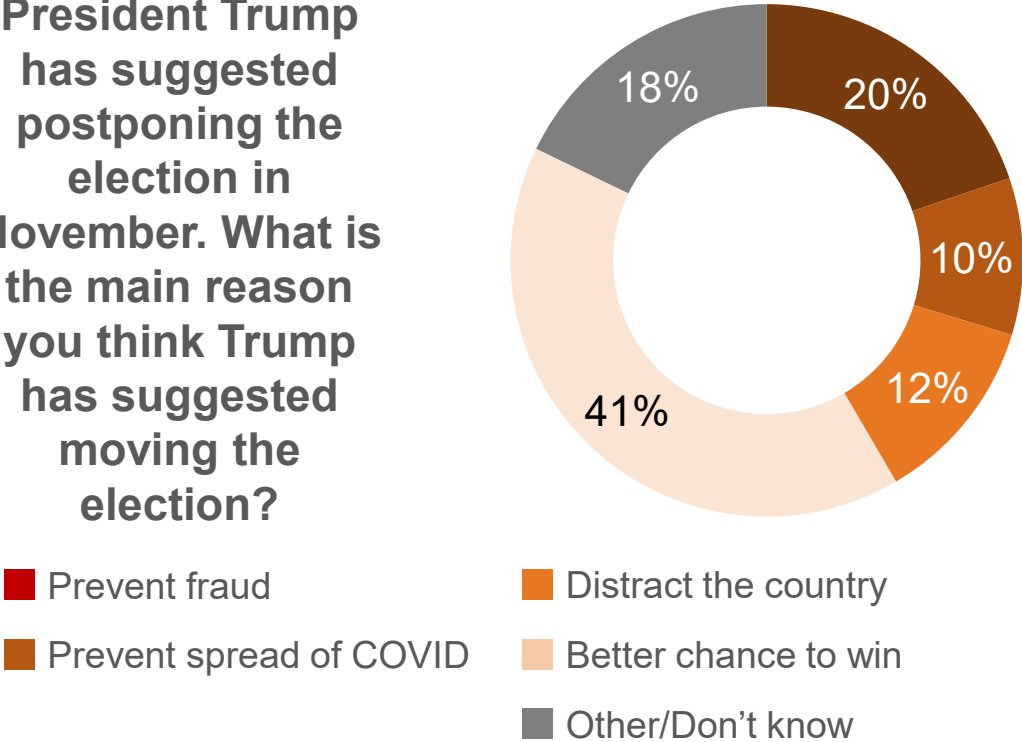
Delay the election?

Delay the election?

Recently, some have proposed postponing the election for Congress and the President because of fear of voter fraud from mail-in ballots. Do you support or oppose postponing the election?

Support 24%

Not support 76%

Why?

President Trump has suggested postponing the election in November. What is the main reason you think Trump has suggested moving the election?

20%
10%
12%
41%
18%

■ Prevent fraud   ■ Distract the country

■ Prevent spread of COVID   ■ Better chance to win

■ Other/Don't know

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
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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.

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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.