Welcome to our webinar!

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

Chris Jackson
Senior Vice President

Chris.Jackson@ipsos.com

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

Ipsos

AGENDA

1. CONTEXT

2. PERCEPTIONS OF DONALD TRUMP

3. GENERAL ELECTION

4. ELECTION FORECASTING

5. QUESTIONS

CONTEXT

1

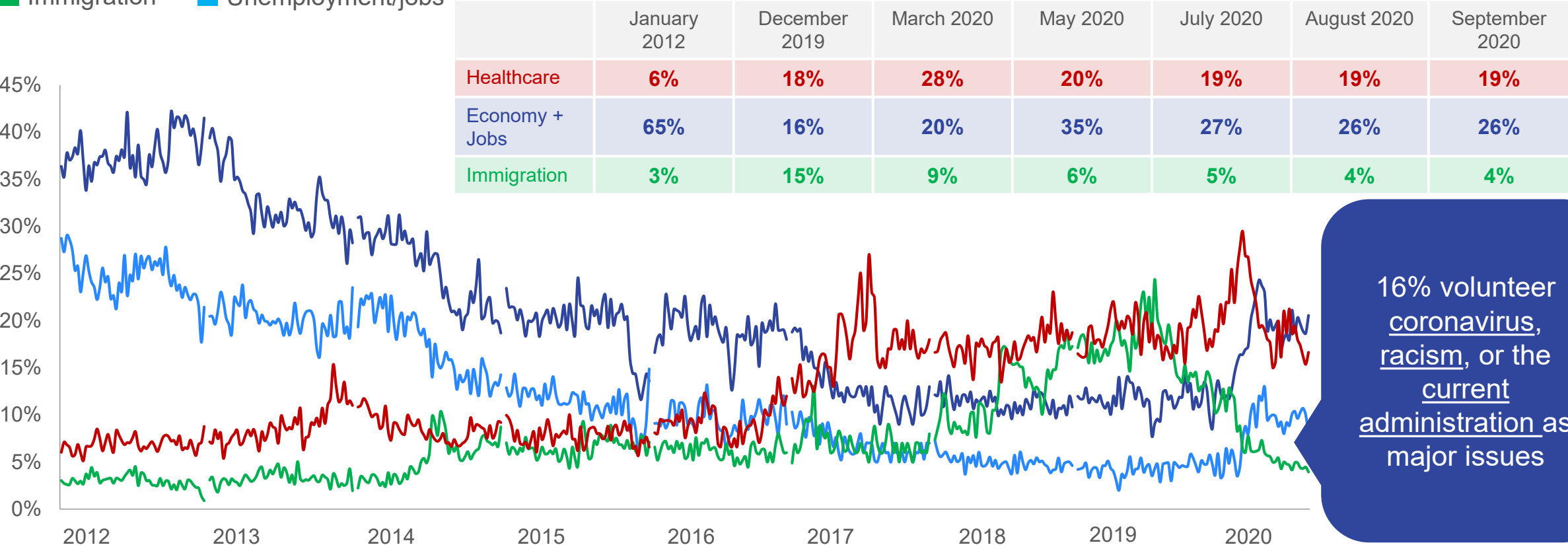# Most Important Problem Facing America

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

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

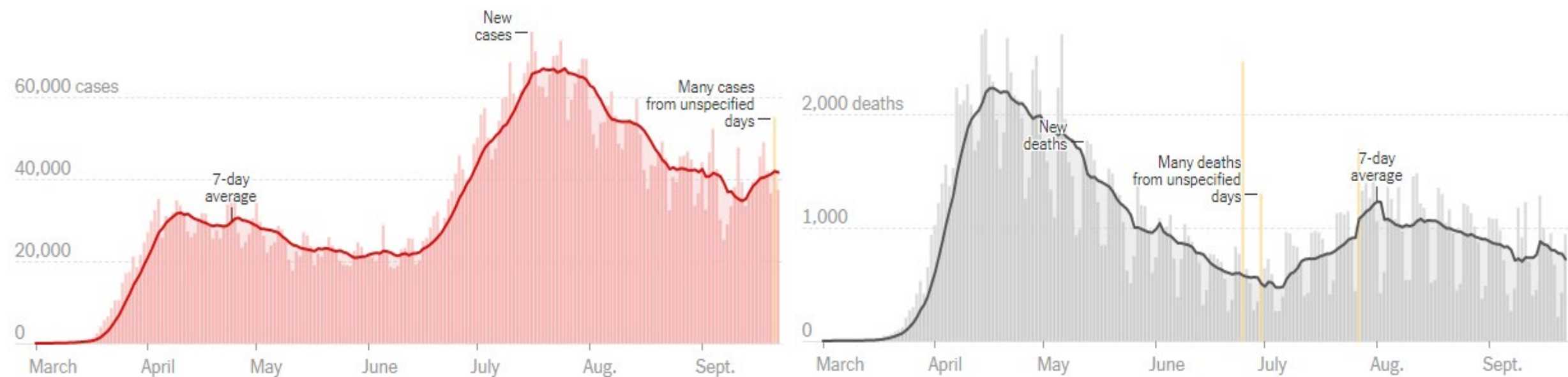|	January 2012	December 2019	March 2020	May 2020	July 2020	August 2020	September 2020
Healthcare	6%	18%	28%	20%	19%	19%	19%
Economy + Jobs	65%	16%	20%	35%	27%	26%	26%
Immigration	3%	15%	9%	6%	5%	4%	4%

16% volunteer <u>coronavirus</u>, <u>racism</u>, or the <u>current administration</u> as major issues

Reuters/Ipsos Data

Coronavirus continues to spread at a high rate in the U.S.

+6.9 million confirmed cases, +200,000 deaths

New cases

7-day average

60,000 cases

40,000

20,000

0

Many cases from unspecified days

March | April | May | June | July | Aug. | Sept.

New deaths

Many deaths from unspecified days

7-day average

2,000 deaths

1,000

0

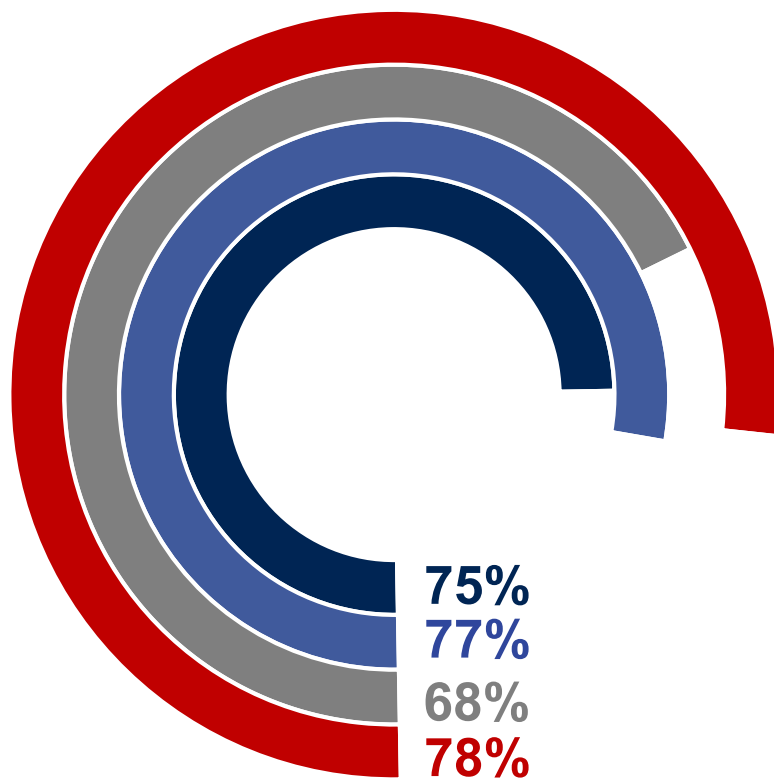March | April | May | June | July | Aug. | Sept.
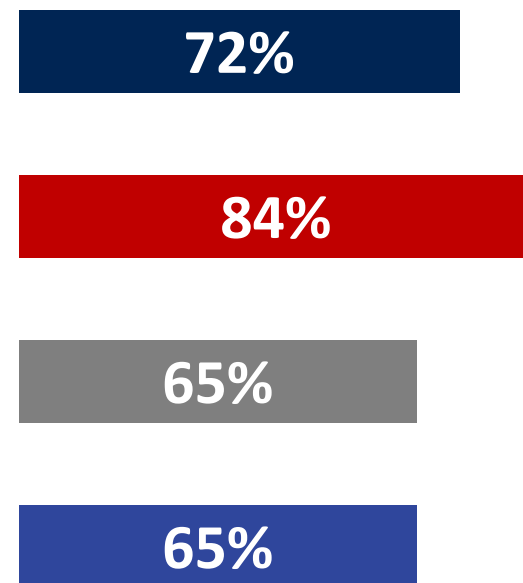
Source: New York Times
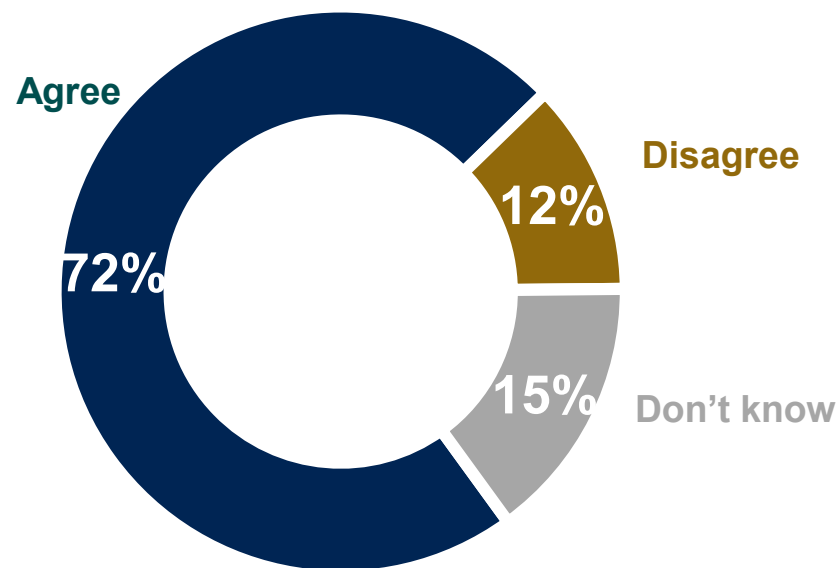
Battle for the soul of the nation

■ All Americans ■ Republicans ■ Independents ■ Democrats

% Agree "We are in a battle for the soul of the nation"
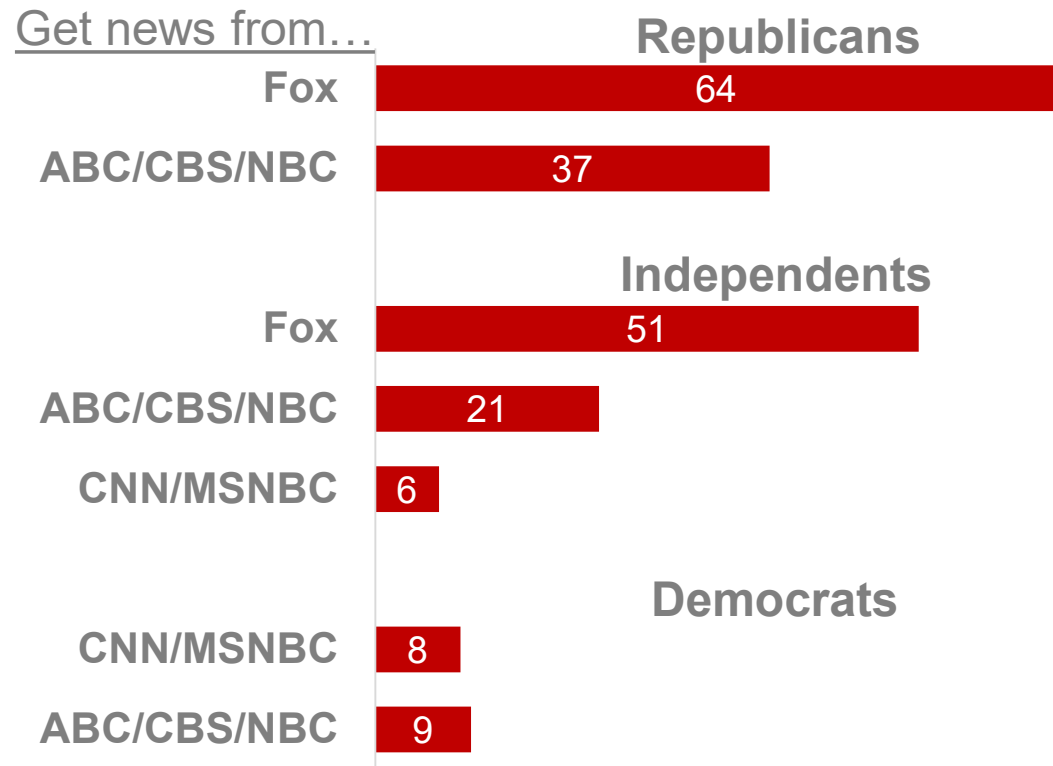
75%
77%
68%
78%

"There is chaos and destruction going on in America's inner cities"

Agree
72%

Disagree
12%

Don't know
15%

72%
84%
65%
65%

Source: Ipsos poll, September 2020

Ipsos

Alternate Realities

Is the official COVID-19 death toll…

■ Exaggerated

Get news from…

Republicans

Fox	64
ABC/CBS/NBC	37

Independents

Fox	51
ABC/CBS/NBC	21
CNN/MSNBC	6

Democrats

CNN/MSNBC	8
ABC/CBS/NBC	9

Do you approve of Trump's handling of COVID

■ Total approve

Get news from…

Republicans

Fox	80
ABC/CBS/NBC	53

Independents

Fox	46
ABC/CBS/NBC	13
CNN/MSNBC	12

Democrats

CNN/MSNBC	5
ABC/CBS/NBC	7

Ipsos
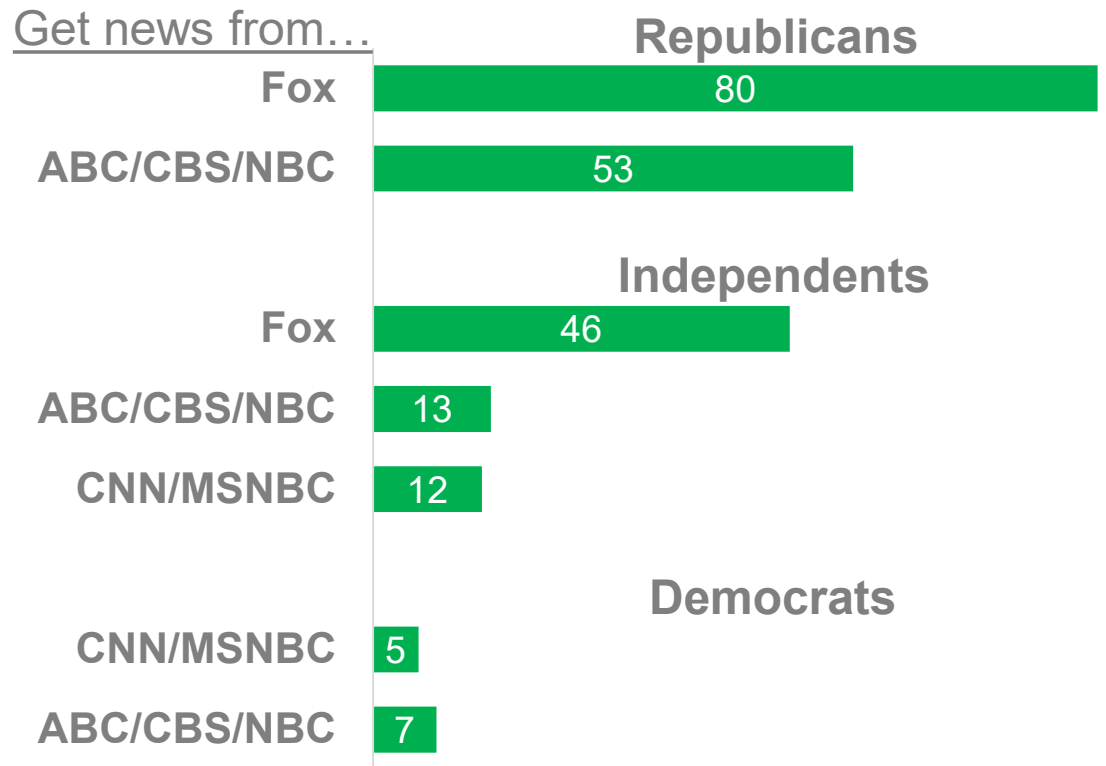
Republicans more likely to believe Donald Trump should nominate RBG Replacement before election

Percent Agree With the Following Statements

How do you expect the death of Justice Ruth Bader Ginsburg to impact the presidential election?

Increase Support For Trump — 23%

Increase Support For Biden — 29%

No impact — 23%

Don't know — 25%

President Donald Trump should nominate a replacement for Ruth Bader Ginsburg before his term ends :

- 46%
- 25%
- 78%
- 33%

The winner of the election should be able to appoint Ruth Bader Ginsburg's replacement on the Supreme Court

- 62%
- 84%
- 49%
- 42%

■ All Respondents ■ Republicans ■ Democrats ■ Independents
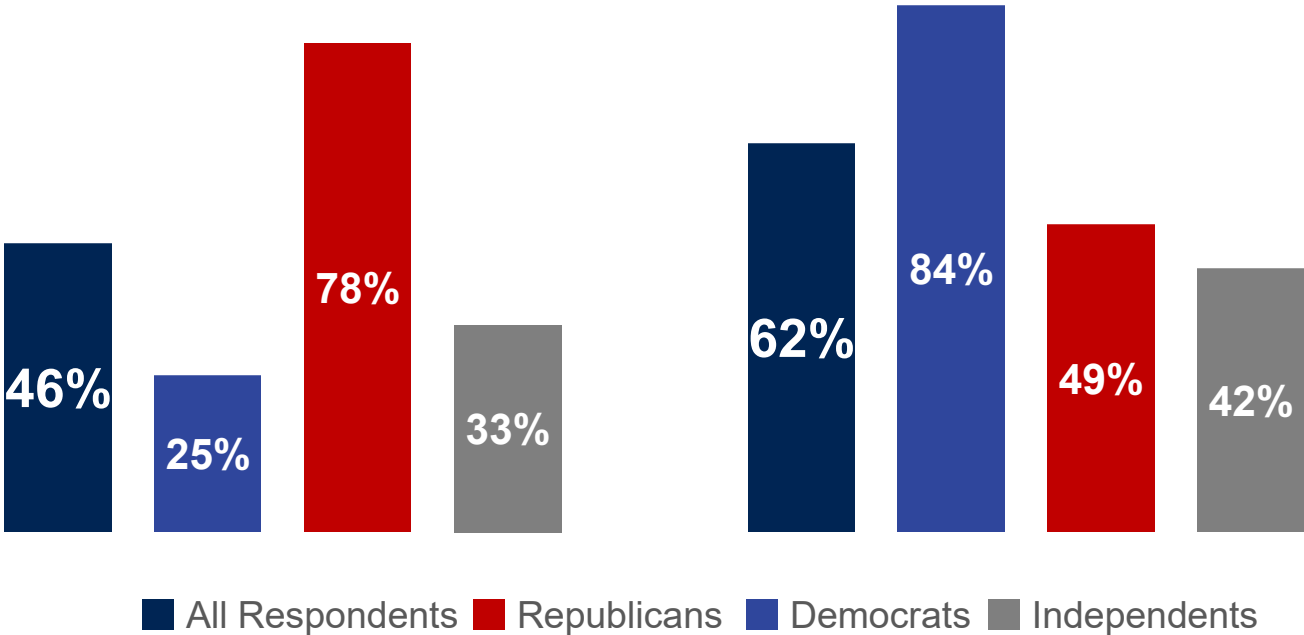
Reuters/Ipsos Data.
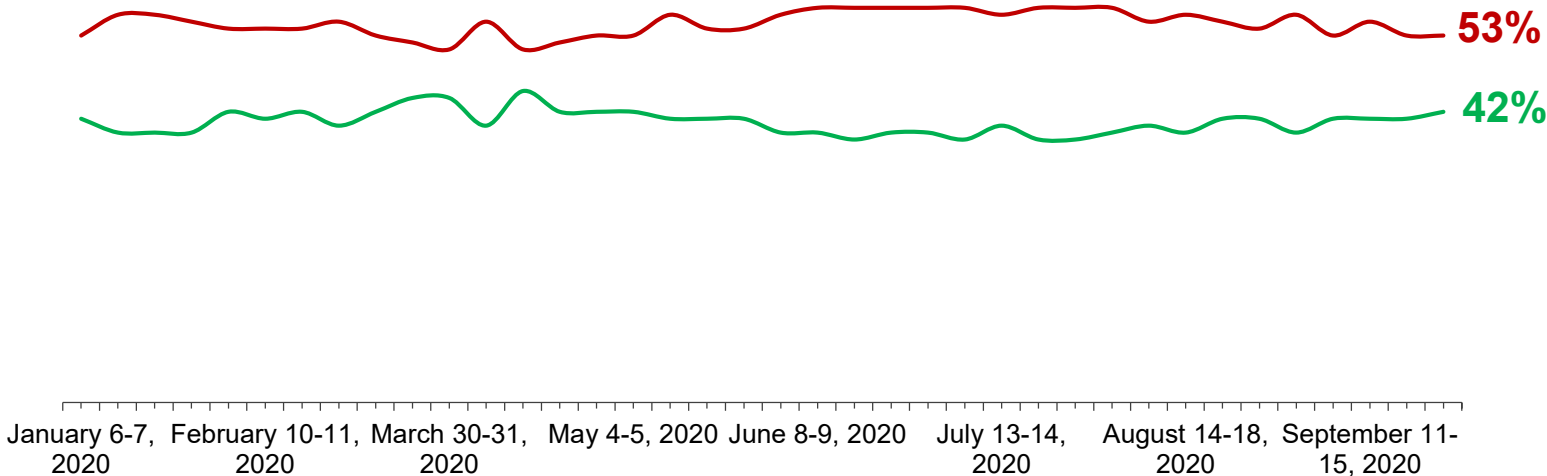
Ipsos

Perceptions of Donald Trump

2

© Ipsos

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

53%

42%

January 6-7, 2020   February 10-11, 2020   March 30-31, 2020   May 4-5, 2020   June 8-9, 2020   July 13-14, 2020   August 14-18, 2020   September 11-15, 2020

Presidential approval going into second election

Year	President	Approval Rating
2012	Barack Obama	52%
2004	George W. Bush	50%
1996	Bill Clinton	58%
1992	George H.W. Bush	33%
1984	Ronald Reagan	54%
1980	Jimmy Carter	35%

Reuters/Ipsos Data
Source: Gallup Presidential Job Approval Center

President Trump's approval rating by state

Legend:
- 50 or more
- 45-49
- 40-44
- 35-39
- 30-34
- 29 or less
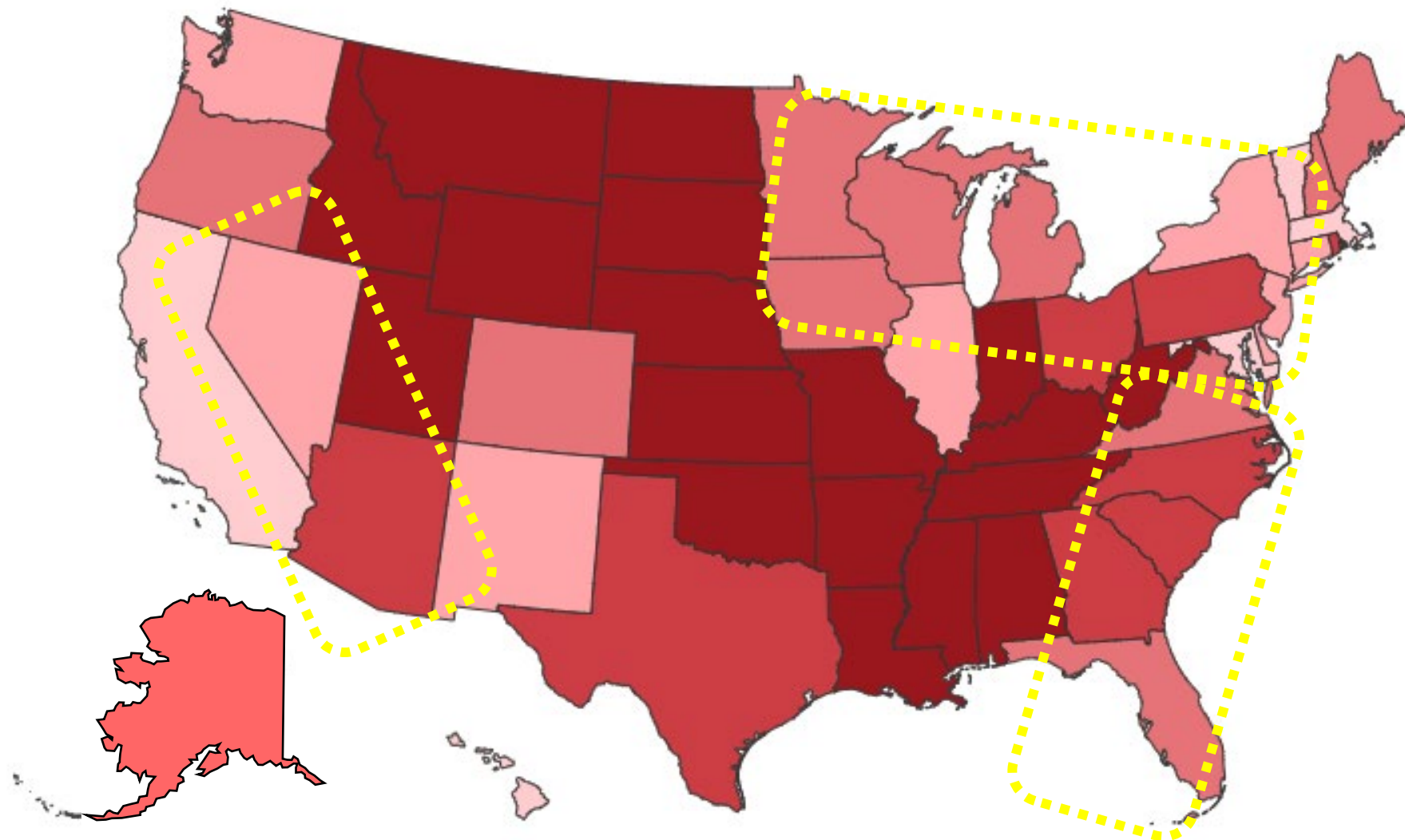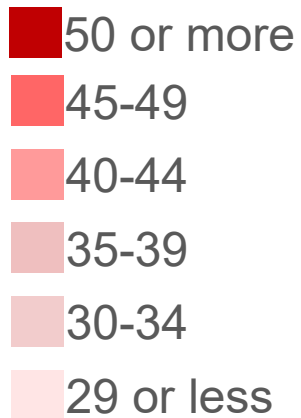
Reuters/Ipsos Political Atlas

Ipsos

President Trump's approval rating on key issues

Overall, do you approve or disapprove of the way Donald Trump is handling the following issues?...

	Strongly approve	Somewhat approve	Lean towards approve	Lean towards disapprove	Somewhat disapprove	Strongly disapprove	Don't know	TOTAL APPROVE	TOTAL DISAPPROVE
The U.S. economy	**27%**	**12%**	**11%**	**8%**	**6%**	**31%**	**5%**	**50%**	**45%**
Employment/jobs	**28%**	**12%**	**11%**	**8%**	**7%**	**30%**	**5%**	**50%**	**44%**
Coronavirus	**19%**	**14%**	**8%**	**7%**	**6%**	**43%**	**4%**	**40%**	**56%**

Reuters/Ipsos

Ipsos

General Election

3

© Ipsos

Presidential Ballot Trend – Likely Voters

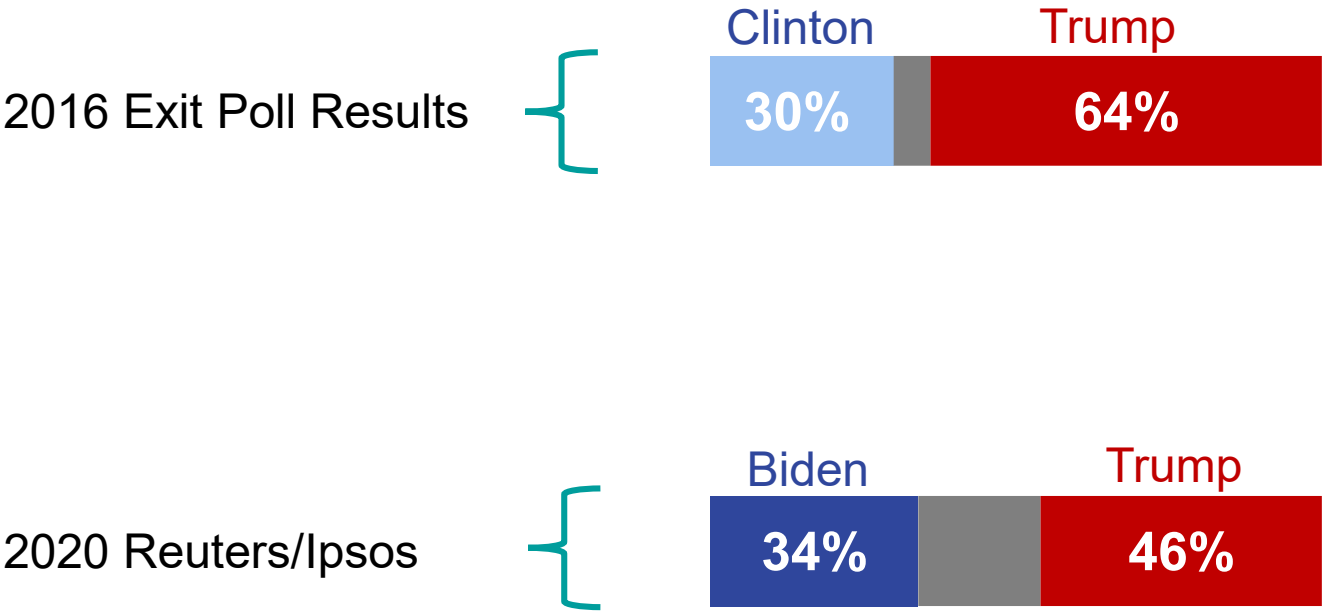If the 2020 presidential election were held today, would you vote for Donald Trump or Joe Biden? *Order of candidates is randomly rotated in question text*

Donald Trump
Joe Biden

Begin Reporting Likely Voters

50%

42%

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
August 19-25, 2020
August 28-September 1, 2020
September 3-8, 2020
September 9-10, 2020
September 11-15, 2020
September 15-17, 2020
September 18-22, 2020
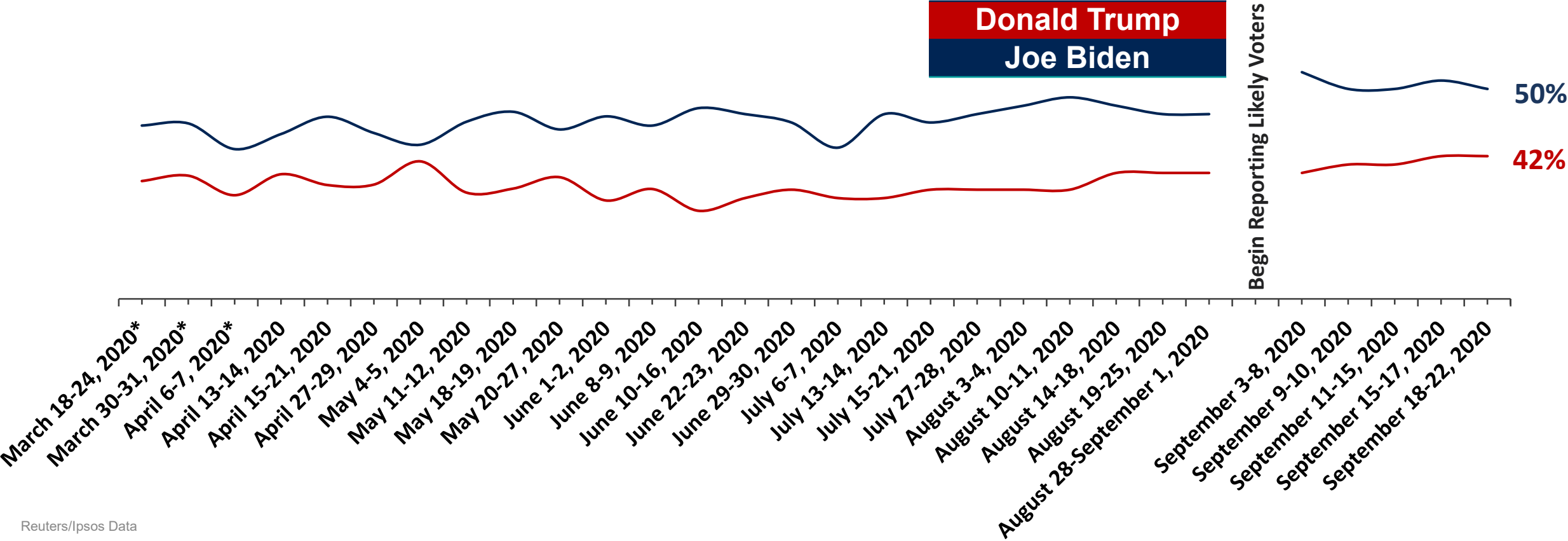
Reuters/Ipsos Data

© Ipsos

Trump less dominant with white voters than 2016

Support among non-college educated white voters

2016 Exit Poll Results

Clinton **30%** | Trump **64%**

2020 Reuters/Ipsos

Biden **34%** | Trump **46%**

Stated Intent to Vote Climbing Among Democrats

May 2020
- Republican: **77%**
- Democrat: **74%**

August 2020
- Republican: **78%**
- Democrat: **79%**

Source: Ipsos analysis

© Ipsos

Undecided voters trend – likely 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*
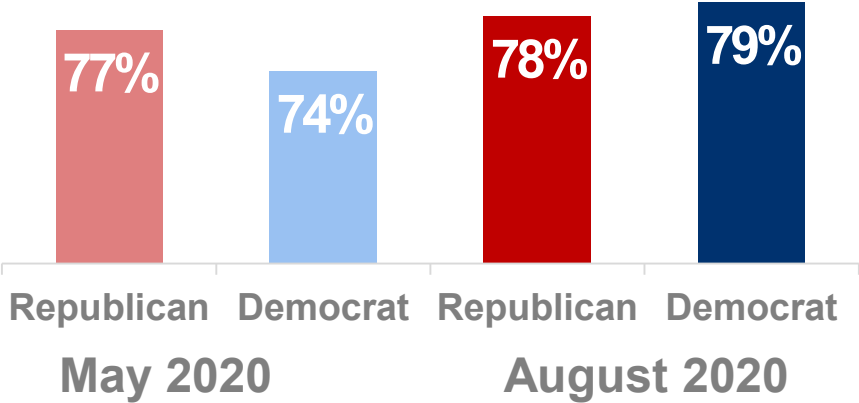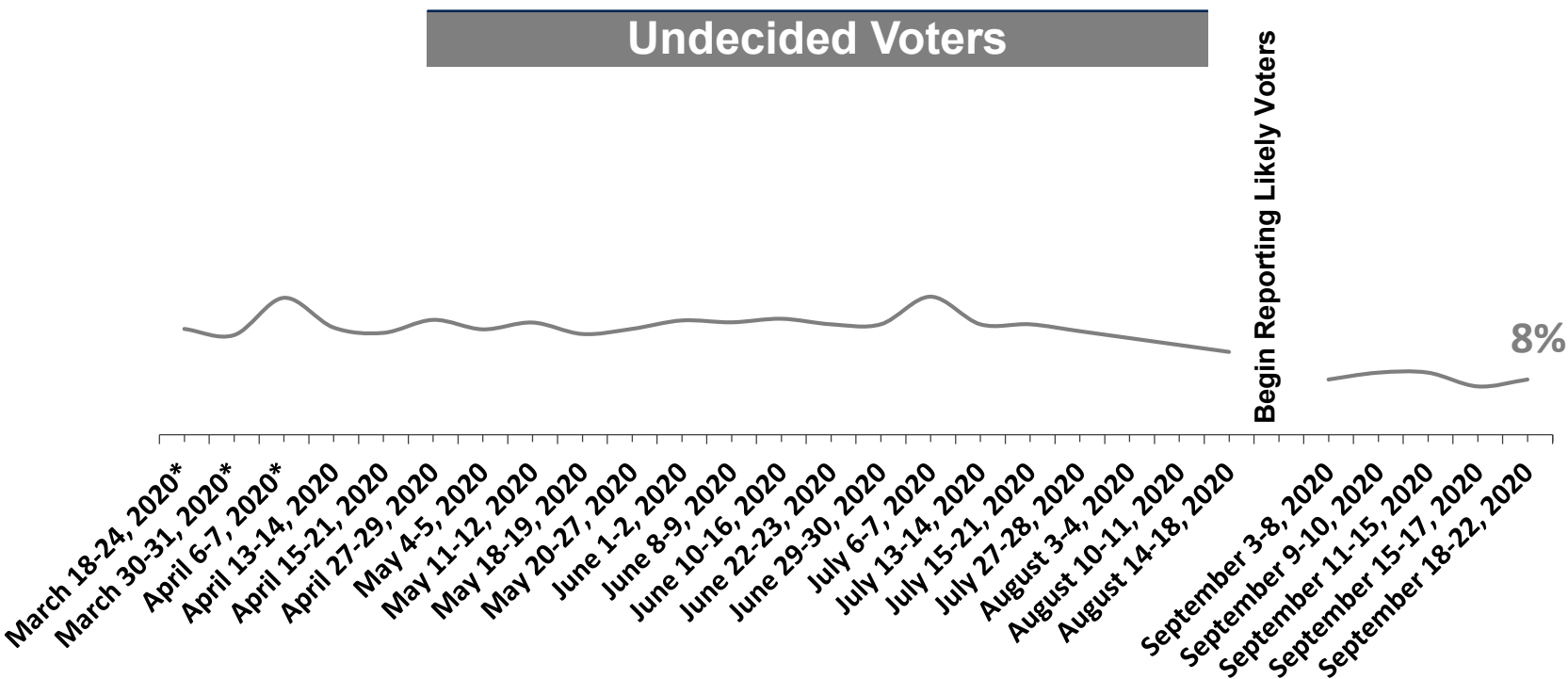

Undecided Voters

Begin Reporting Likely Voters

8%

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
September 3-8, 2020
September 9-10, 2020
September 11-15, 2020
September 15-17, 2020
September 18-22, 2020

Undecided Voters in Past Elections

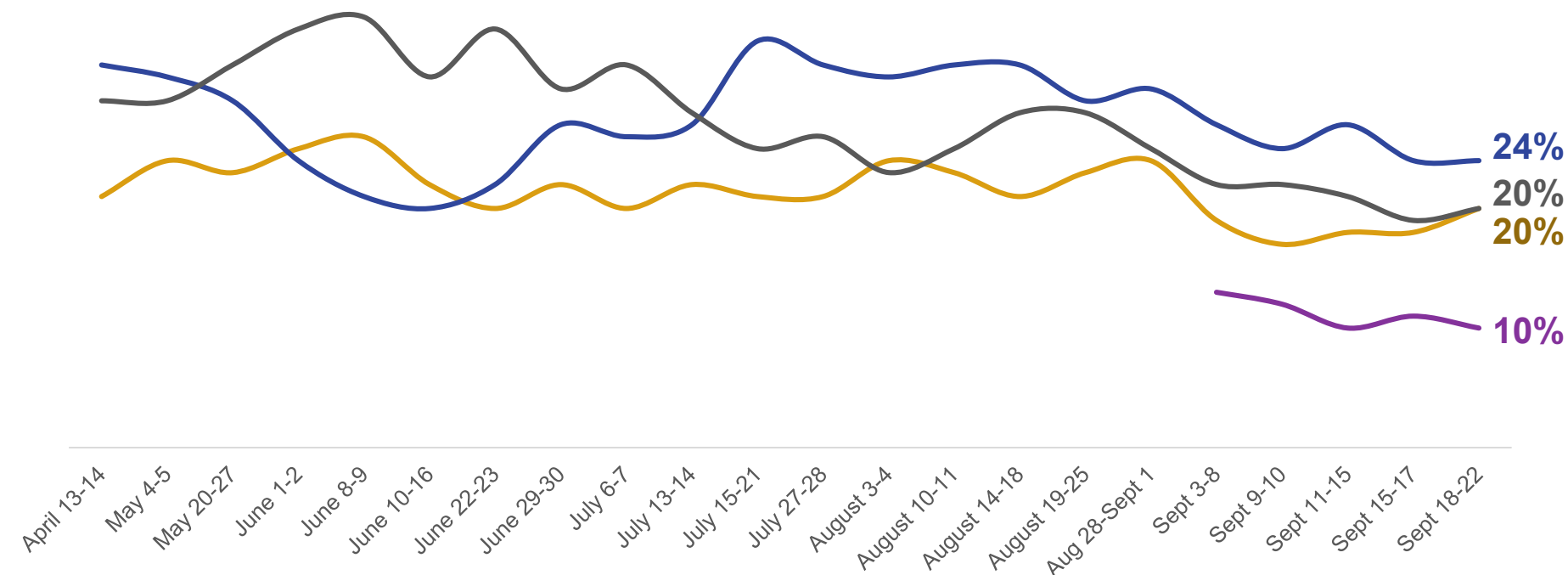| Year	With 100 days to go	On Election day
2016	18.5%	12.5%
2012	7.6%	4.3%
2008	13.1%	3.6%
2004	6.4%	3.4%
2000	17.8%	8.9%

Reuters/Ipsos, FiveThirtyEight

*"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

Coronavirus is the key issue this 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?

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

24%
20%
20%
10%

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 · August 19-25 · Aug 28-Sept 1 · Sept 3-8 · Sept 9-10 · Sept 11-15 · Sept 15-17 · Sept 18-22

Current leader on issue

Biden +5

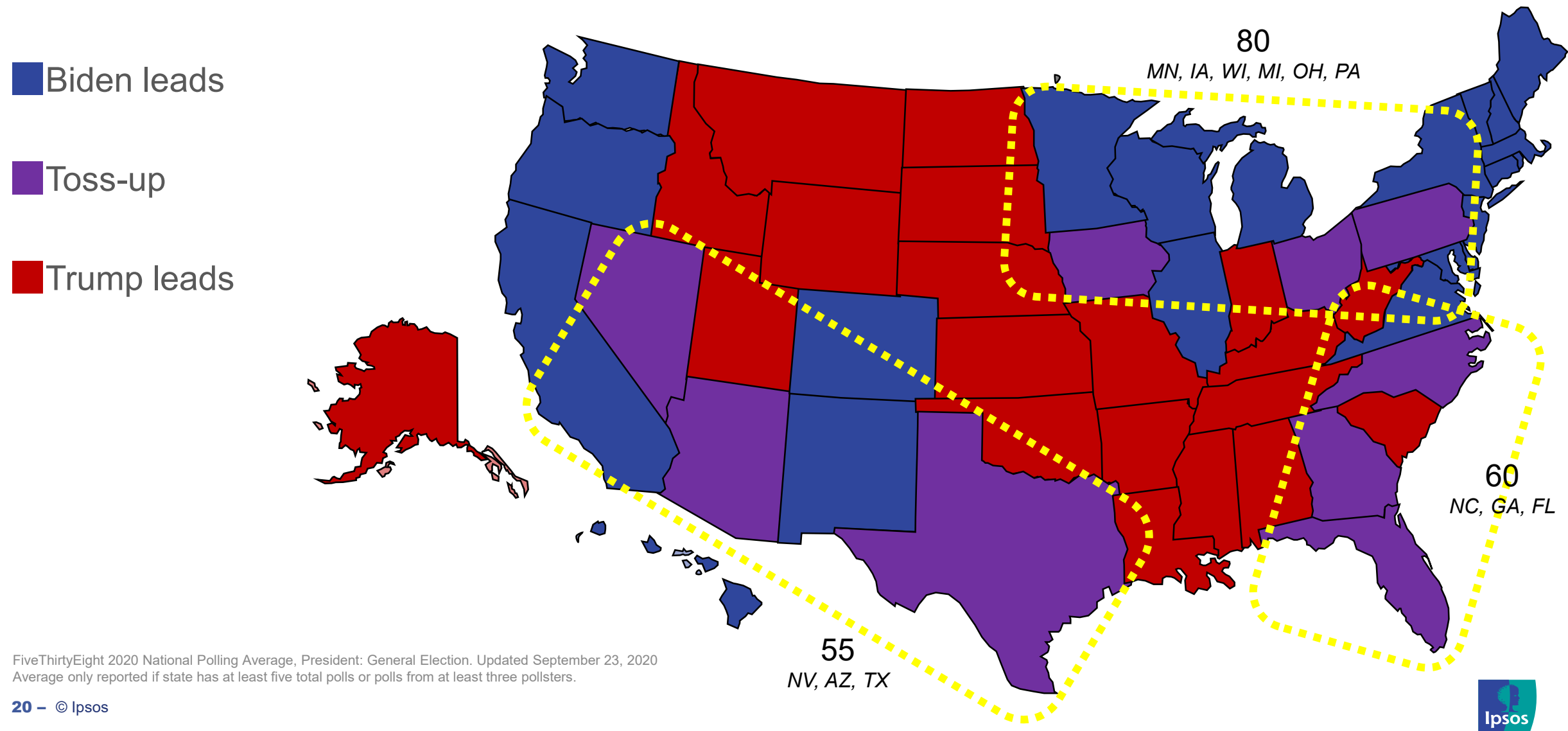**Biden +8**

Trump +9

Trump +7

Reuters/Ipsos

Ipsos

Election Forecasting

4

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

■ Biden leads

■ Toss-up

■ Trump leads

80
MN, IA, WI, MI, OH, PA

60
NC, GA, FL

55
NV, AZ, TX

FiveThirtyEight 2020 National Polling Average, President: General Election. Updated September 23, 2020
Average only reported if state has at least five total polls or polls from at least three pollsters.

Ipsos polls show tight races, with Biden having slight edge in Wisconsin and Michigan
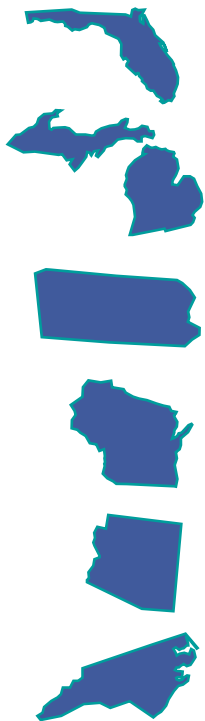
State	Vote share (Reuters/Ipsos)	State Trump Approval (Among All Respondents)	Base Rate Model Probabilities
Florida	Even	48%	Trump 86%
Michigan	Biden +5	42%	Trump 55%
Pennsylvania	Biden +3	44%	Trump 74%
Wisconsin	Biden +5	43%	Trump 70%
Arizona	Biden +1	43%	Trump 70%
North Carolina	Even	44%	Trump 74%

Ipsos Projection of State Polling data

Election Forecast: Mixed Signals

Source	Finding	Advantage
Base rate model - national	Trump approval between 40-45%	Trump
Base rate model - state	Trump 3-5 points stronger in key states	Trump
Main problem heuristic	Biden preferred on COVID and restoring trust	Biden
Election poll – national	Biden has sizable lead in national polls	Biden
Election poll - state	Biden leads in states sufficient to reach 270	Biden
Academic/econometric	Mixed ranging from Trump to Biden	Mixed

AVERAGE OF SOURCE PROJECTIONS

Summary judgement	Mixed signals, Biden slight favorite	Slightly Biden

Source: Ipsos analysis

© Ipsos

Potential outcomes for 2020

One in Five	Two in Five	Two in Five
Blue Wave *(Democrats hold House, take Senate and White House)*	**Narrow Biden Win** *(Democrats hold House, take White House, Republicans hold Senate)*	**Narrow Trump Win** *(Democrats hold House, Republicans hold Senate & White House)*
Emboldened progressive control of government	**Status quo ante**	**Continued governmental and social disorder**
• Focus on getting coronavirus and economy under control • Potential for major federal spending • Proactive regulatory state • Opportunities for "good" private sector actors to set agendas	• Halting efforts to manage pandemic & revive economy • Reconstituted regulatory apparatus and legislative gridlock • Relative freedom of maneuver for private sector within existing context	• Personality-driven global policy setting • Pandemic and economic fallout continue • Ongoing political and social risk for private sector • Deregulatory efforts prioritize industry agenda

Source: Ipsos analysis

© Ipsos

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

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

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).

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

Game Changers

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

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.