



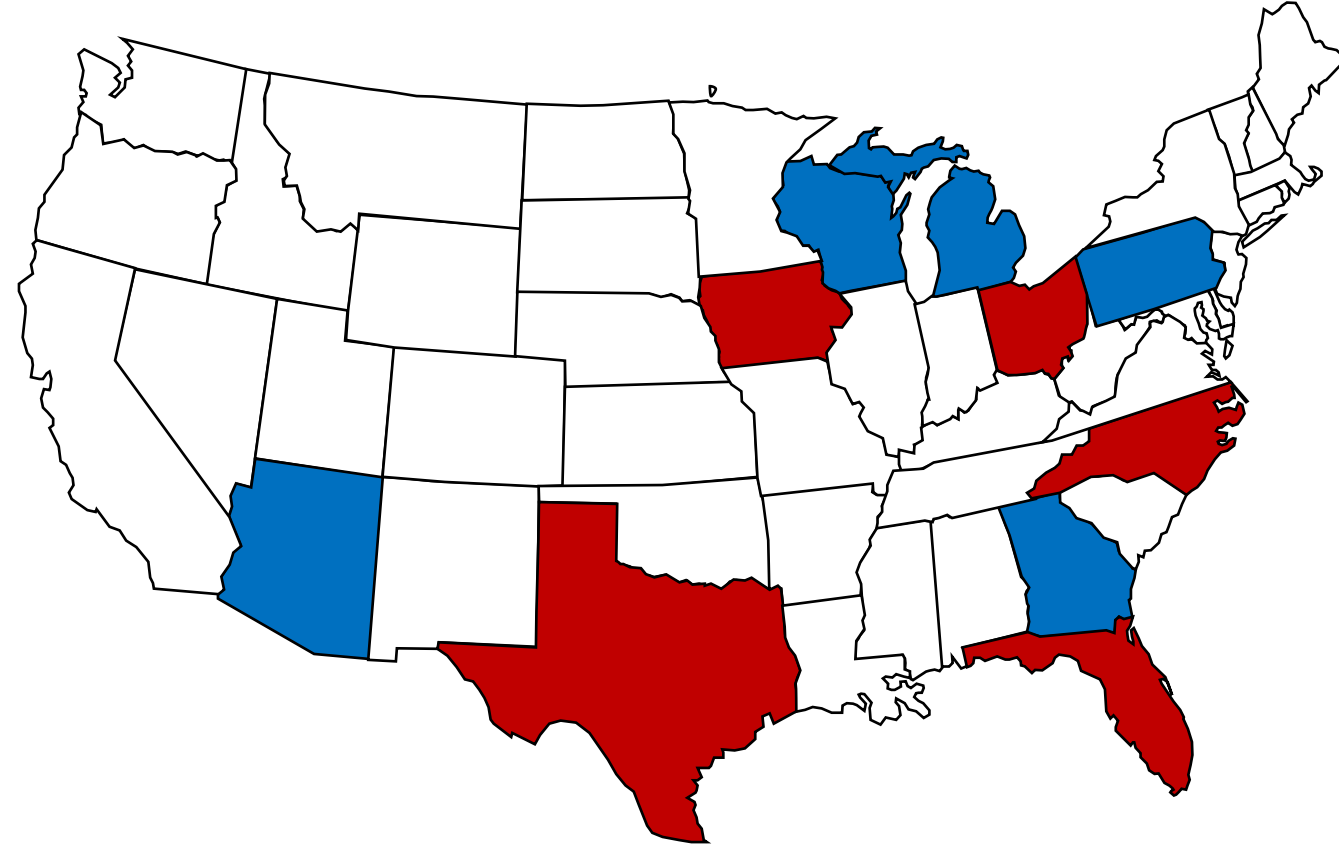
Post Election Exit Poll Analysis 10 Key Target States

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State Groupings

We focused on the 10 battleground states that President Trump won in 2016, but split in 2020.

- The “**Flipped**” group are the five states won by Trump/Pence in 2016, but won by Biden in 2020 – Arizona, Georgia, Michigan, Pennsylvania and Wisconsin.
- The “**Held**” group are the five most competitive states won by Trump/Pence in both 2016 and 2020 – Florida, Iowa, North Carolina, Ohio and Texas.



Data Sources

- Data is from the National Election Pool's exit polls and AP's VoteCast.
- Each state grouping's data is an average of the individual states.
- Sample in each state grouping was:

	NEP Exit Poll	AP VoteCast
Flipped	15,787	18,100
Held	23,825	17,456
Total	39,612	35,556



Key Take-Aways: (1)

- Despite turnout for both state groups being MORE GOP in 2020 than 2016, POTUS lost ground in both groups largely due to a massive swing against POTUS among Indies in both state groups and more GOP ‘leakage’ in “Flipped” states.
- Racially, POTUS suffered his greatest erosion with White voters, particularly White Men in both state groups. However, he made double digit gains with Hispanics in both groups, while his performance among Blacks was virtually the same as 2016.
- POTUS lost ground with almost every age group in both state groupings, but he lost the most with voters 18-29 and 65+ in “Flipped” states. Worse was the double-digit erosion he suffered with White College educated voters across the board.
- Voters who did not vote in ’16 but voted in ’20 accounted for roughly 1-in-6 voters and they broke markedly for Biden, especially in the “Flipped” states. 1-in-10 voters say they decided their vote in the final month of the campaign, and contrary to conventional wisdom, they broke in Biden’s favor in both state groups.
- While Biden’s image was underwater in both state groups, POTUS’s was more so in the “Flipped” states, while he was a net positive in the “Held” states.
- VPOTUS held a marked image advantage over Harris in both state groups where his image was net positive. Harris’s image was worse than Biden’s in both state groups.

Key Take-Aways: (2)

- While a majority of voters said they didn't find either Presidential candidate honest or trustworthy, Biden held a double-digit advantage over POTUS, especially in the "Flipped" states.
- POTUS's overall job approval was mixed with a majority of voters in the "Flipped" states disapproving while voters in the "Held" states were split down the middle. However, POTUS earned negative marks on handling of Coronavirus (CV) in both groups, particularly in flipped states.
- Conversely, Fauci garnered nearly a 3 to 1 positive job approval on handling of CV overall with Fauci detractors voting overwhelmingly for POTUS while Fauci supporters voted for Biden by wide margins, especially in "Flipped" states.
- Coronavirus (CV) was the top issue in both state groups – more so in "Flipped" states – and Biden carried those voters nearly 3 to 1. The economy ranked second and POTUS crushed Biden with those voters by a 6 to 1 or better margin.
- Voters in "Flipped" states somewhat more negative about the economy than in "Held" states, and voters in "Held" states more likely to choose POTUS to handle the economy.

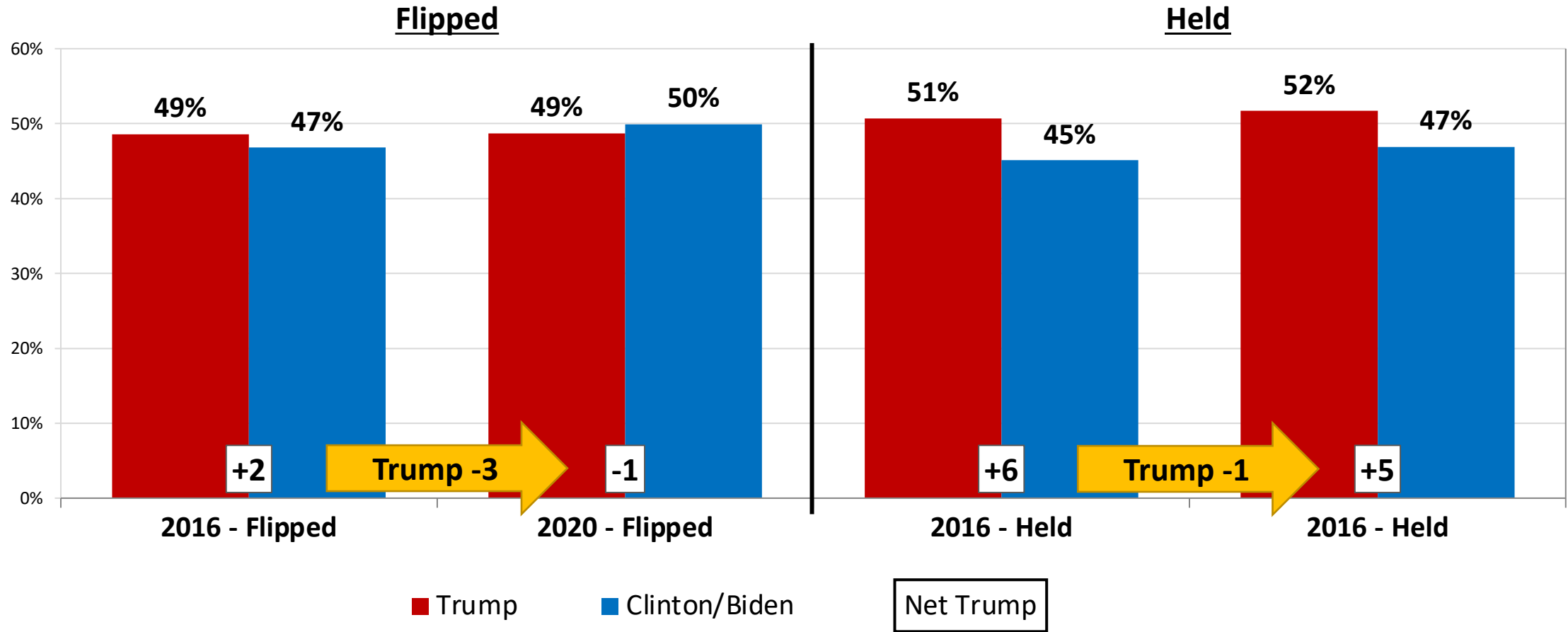


Key Take-Aways: (3)

- While majorities of voters in both state groups prioritized stopping the spread of CV over re-opening the economy, the majority was markedly larger in “Flipped” states. And pluralities in both groups picked Biden as best able to handle CV, not surprisingly by a larger margin in the “Flipped” states.
- State groups were split on whether or not CV was under control with a slight majority of “Flipped” state voters saying no and a majority of “Held” saying yes. And voters were highly polarized based on these positions with voters who say it is under control voting overwhelmingly for POTUS and those who say it isn’t voting overwhelmingly for Biden regardless of state group.
- Three-quarters of voters in both state groups favored public mask mandates. Not surprisingly those who opposed them voted overwhelmingly for POTUS with those who favored them supporting Biden, particularly those in the “Flipped” states.
- 9-in-10 voters in both groups said that SCOTUS was a factor in deciding their vote. Ironically, those who said it was a factor voted for Biden in both state groups while those who said it wasn’t a factor voted for POTUS by large margins.

Popular Vote Shift

- President Trump lost 3 net points in the Flipped states vs only 1 net point in the Held states.

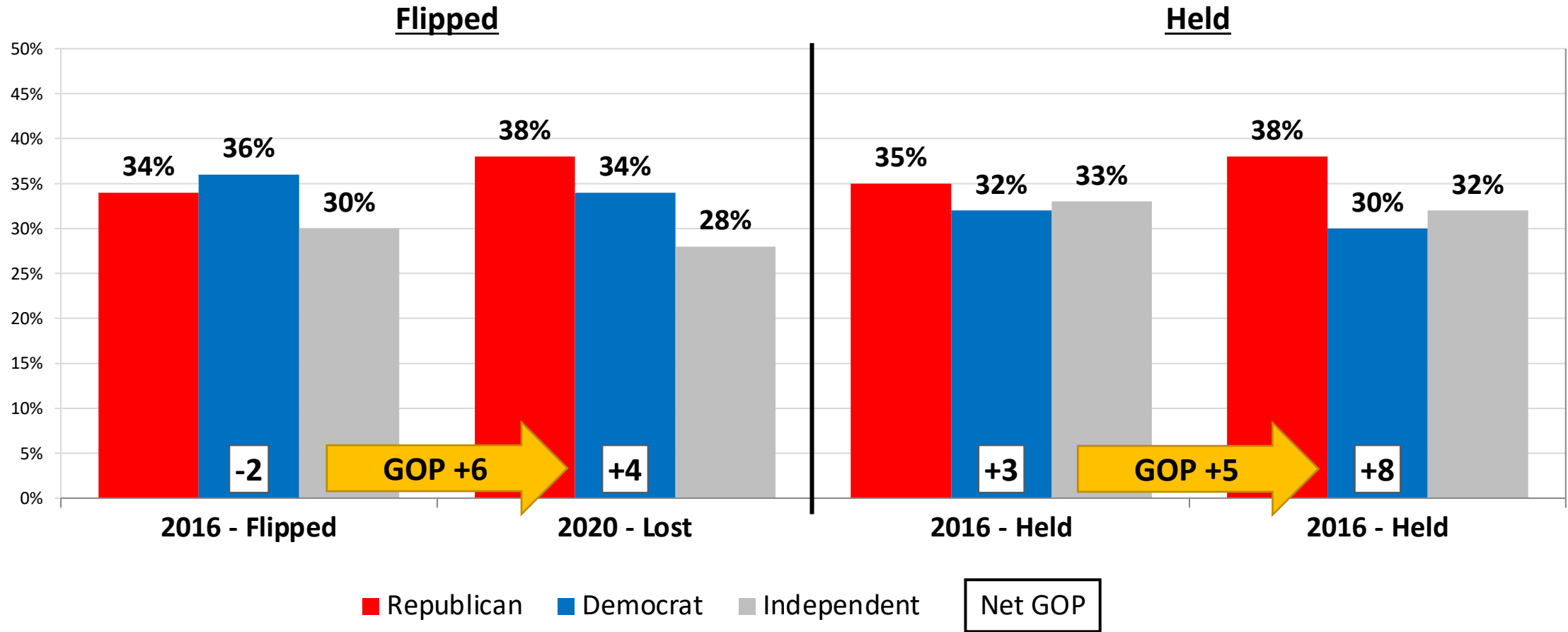


Trends Among Key Demographics



Party Share of Electorate

- In both the Flipped and Held groupings, the electorates were more Republican in 2020 than they were in 2016.



Vote by Party

- In 2016, Trump won Independents by double digits in both the Flipped and Held groupings. They shifted against him significantly in 2020.
- Similar patterns in shifts with GOP voters becoming more hardened in support for Trump but Dem voters picking Biden by an even larger margin than they did Hillary. Though POTUS did “leak” more GOP voters in Flipped states.

Flipped

	Trump	Clinton	Net Trump	Trump	Biden	Net Trump	Net Shift
Republican	90	7	+83	92	7	+85	+2
Independent	50	40	+10	44	53	-9	-19
Democrat	8	90	-82	4	95	-91	-9

Held

	Trump	Clinton	Net Trump	Trump	Biden	Net Trump	Net Shift
Republican	90	7	+83	94	6	+88	+5
Independent	51	39	+12	46	51	-5	-17
Democrat	9	90	-81	5	94	-89	-8



Vote by Race/Ethnicity & Gender

- Dropoff was evident among White voters, especially men.
- Improvement with Hispanic voters was not enough to cancel out losses among White voters.

Flipped

	Trump	Clinton	Net Trump	Trump	Biden	Net Trump	Net Shift
White	59	36	+23	57	42	+15	-8
Black	7	91	-84	8	91	-83	+1
Hispanic	30	65	-35	36	61	-25	+10
White men	65	30	+35	61	38	+23	-12
White women	54	42	+12	54	45	+9	-3

Held

	Trump	Clinton	Net Trump	Trump	Biden	Net Trump	Net Shift
White	62	33	+29	62	37	+25	-4
Black	9	86	-77	11	88	-77	-
Hispanic	32	62	-30	40	58	-18	+12
White men	68	27	+40	66	32	+34	-6
White women	58	38	+20	58	41	+17	-3

Vote by Age & Education

- Voters over 65 shifted away from POTUS in the states that flipped but largely stuck by his side in the states that he held.
- White voters with college degrees were a huge loss for POTUS while those without college degrees stayed in POTUS's column by a larger margin in the states we held than those that flipped.

Flipped

	Trump	Clinton	Net Trump	Trump	Biden	Net Trump	Net Shift
18-29	38	54	-17	37	60	-24	-7
30-44	42	50	-8	46	52	-7	+1
45-64	54	42	+12	53	46	+7	-5
65+	55	42	+13	52	47	+5	-8
White Col+	52	43	+9	47	52	-5	-14
White <Col	65	30	+35	64	35	+29	-6

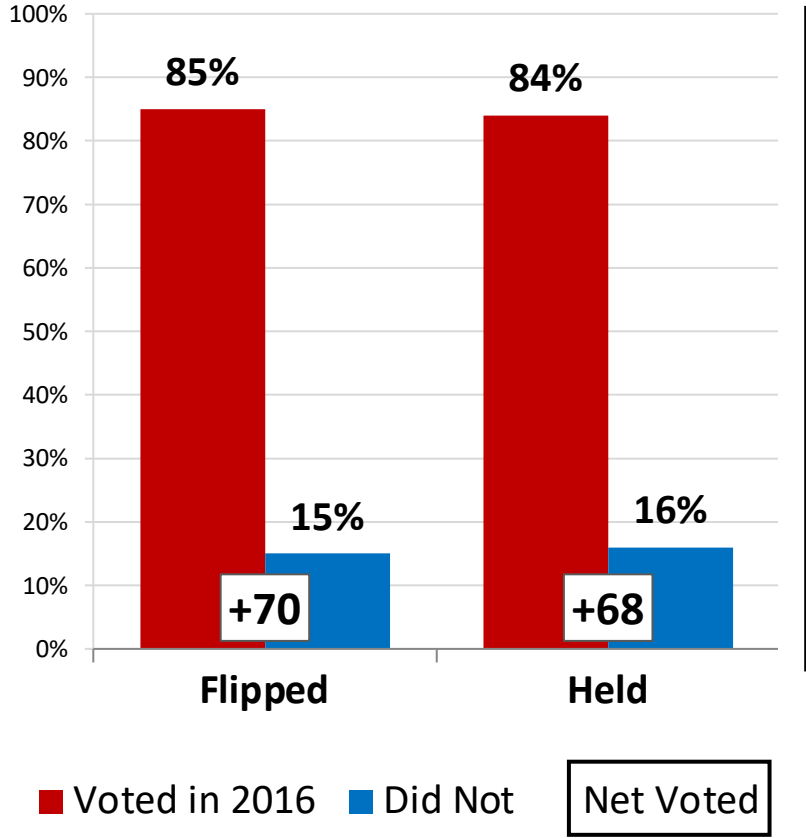
Held

	Trump	Clinton	Net Trump	Trump	Biden	Net Trump	Net Shift
18-29	39	52	-12	40	56	-16	-4
30-44	47	46	+2	47	50	-3	-5
45-64	56	42	+14	55	44	+12	-2
65+	58	40	+17	58	42	+16	-1
White Col+	58	37	+21	51	48	+3	-18
White <Col	66	29	+37	69	30	+39	+2

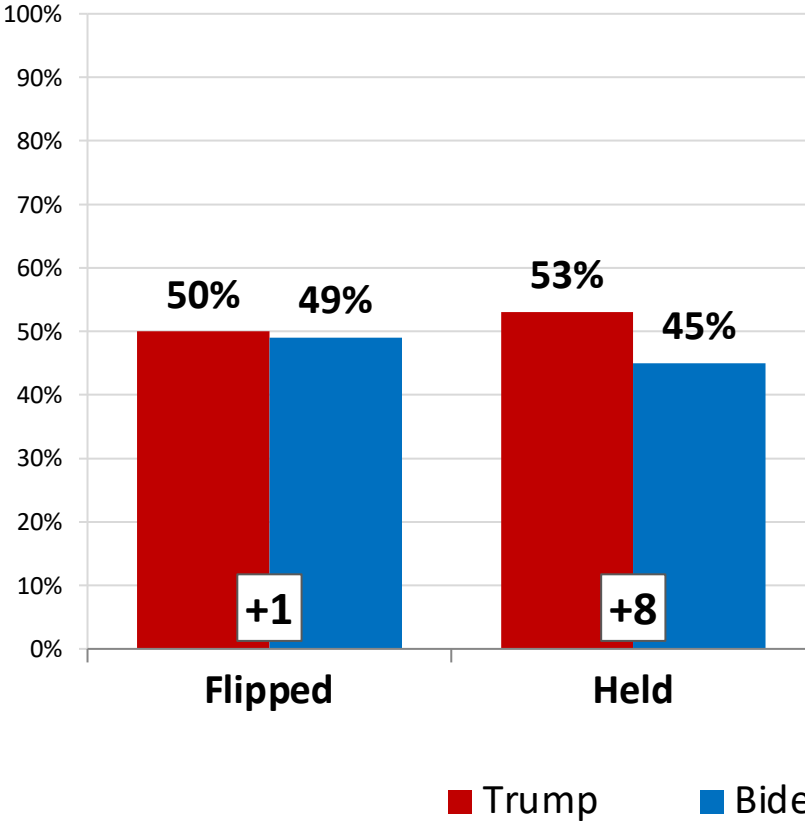
Voted in 2016 vs. Not

- A large majority of voters in November’s election also said they voted in 2016, while about 1-in-6 did not.
- POTUS narrowly won those who had voted in 2016 in the Flipped states, and won them in the Held states by 8.
- Biden won those who didn’t vote in 2016 in both groups, by a larger margin in the Flipped states.

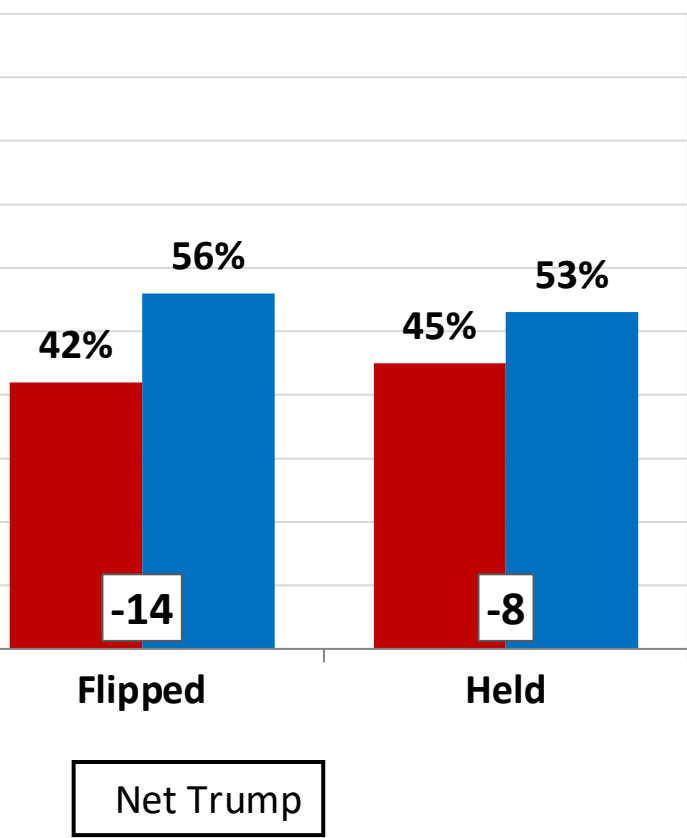
Vote History



Vote – Voted in 2016



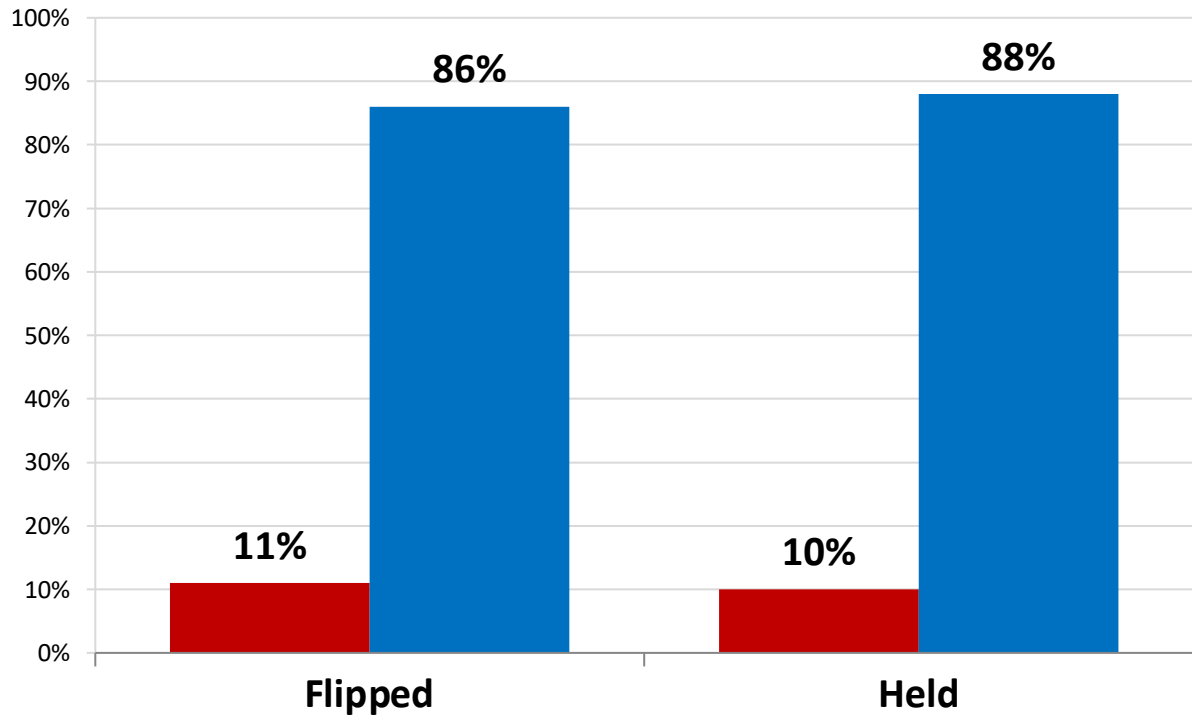
Vote – Did Not Vote in 2016



Impact of Late Deciders

- While most had their minds made up before the last month, 1-in-10 decided late.
- POTUS needed late deciders to break in his direction in the states we flipped, but that did not materialize.

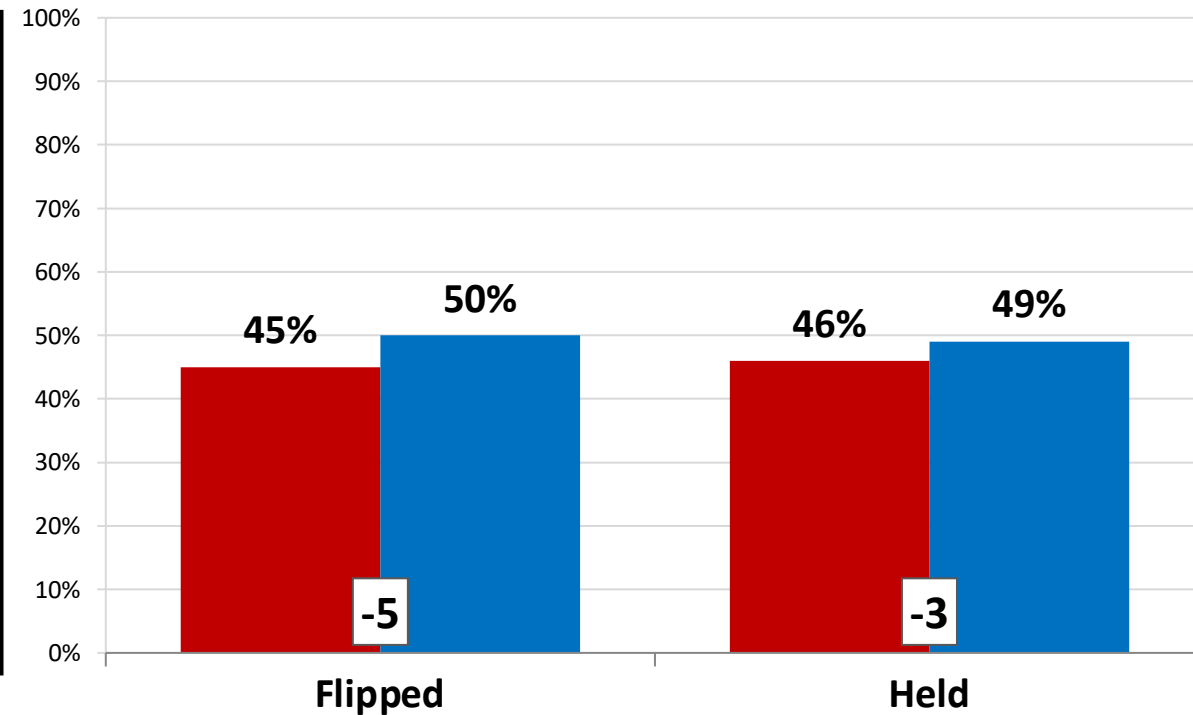
Decided Presidential Vote



■ In the Last Month

■ Before That

Vote – Decided in Last Month



■ Trump

■ Biden

Net Trump



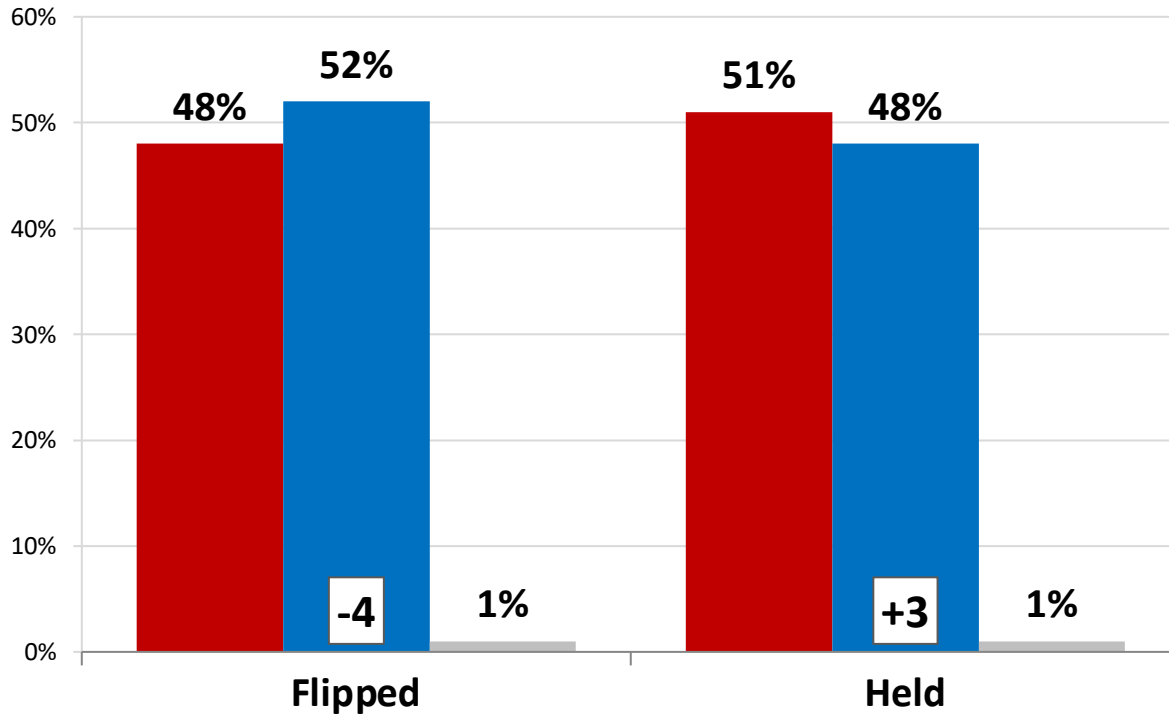
Candidate Images and Ratings



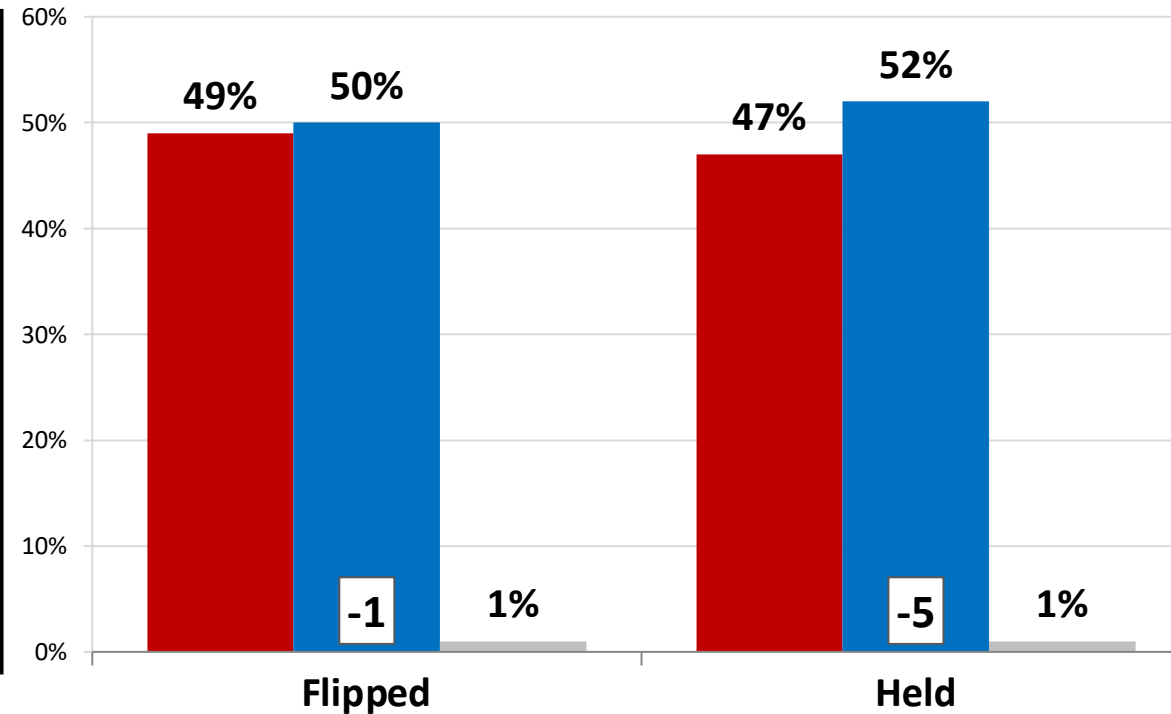
Trump & Biden Image

- POTUS's image is stronger in the states that were held, while the reverse is true for Biden.

Trump Image



Biden Image



Favorable Unfavorable Don't Know

Net Favorable

Favorable Unfavorable Don't Know

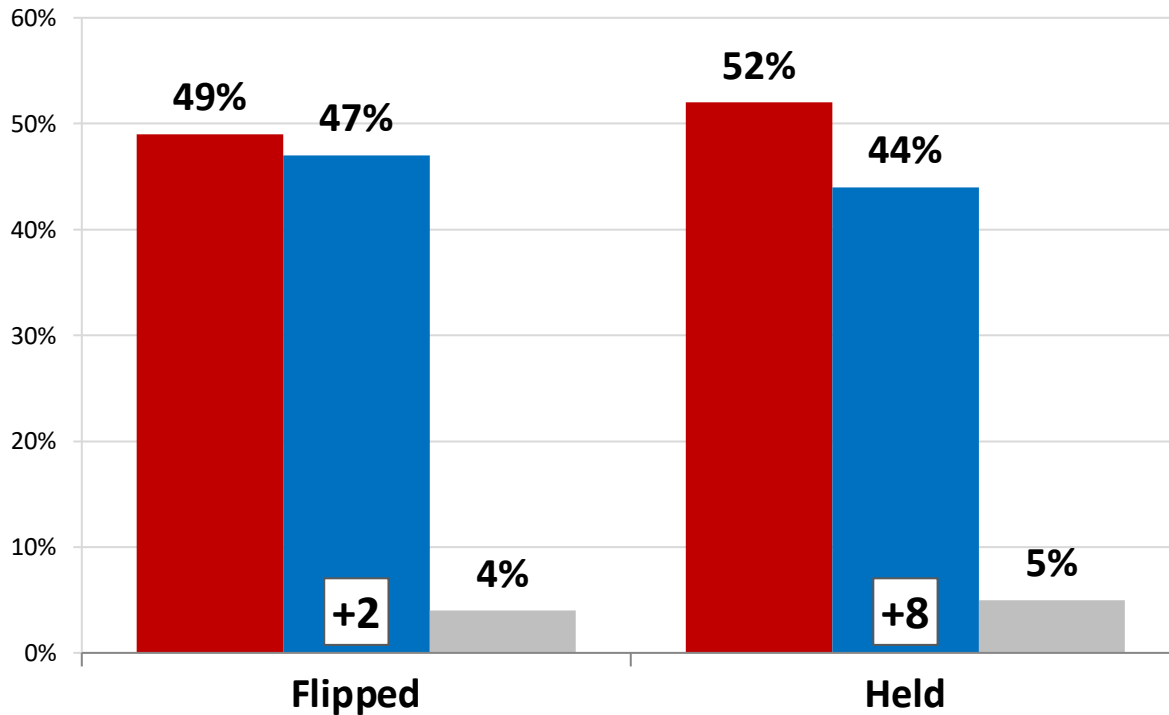
Net Favorable



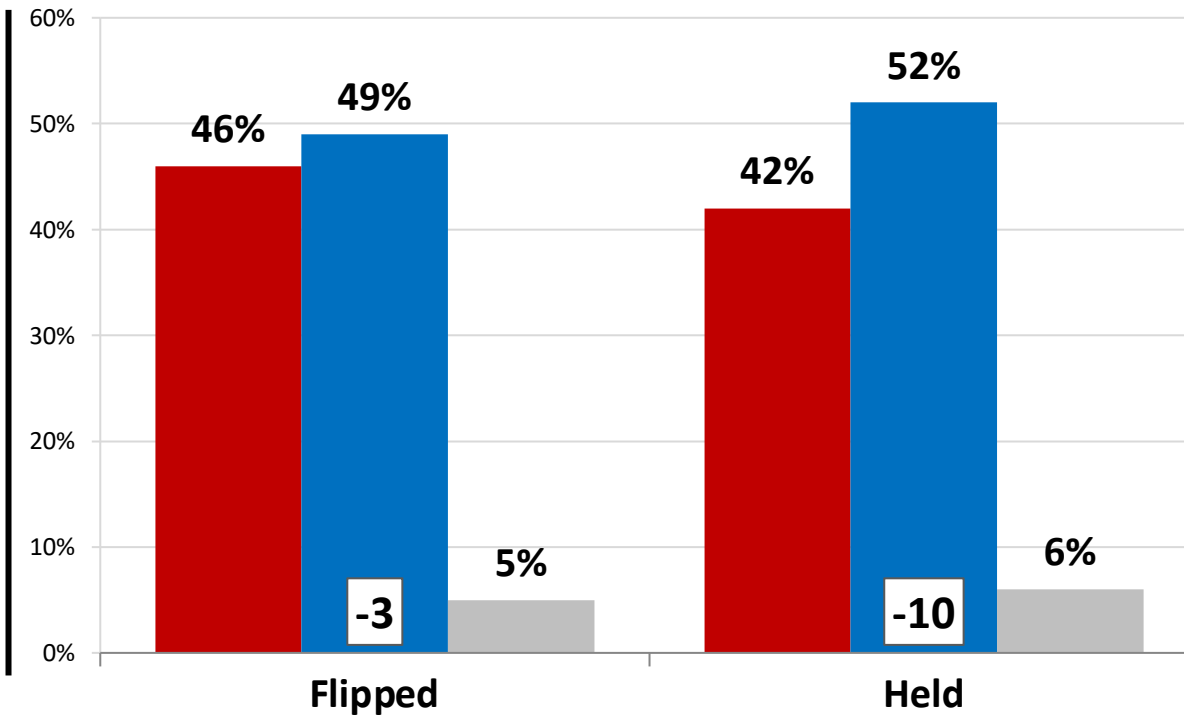
Pence & Harris Image

- Pence's image is in positive territory in both state groupings, especially the states that were held.
- On the other hand, Harris is underwater in the Flipped and Held groups.

Pence Image



Harris Image



Favorable Unfavorable Don't Know

Net Favorable

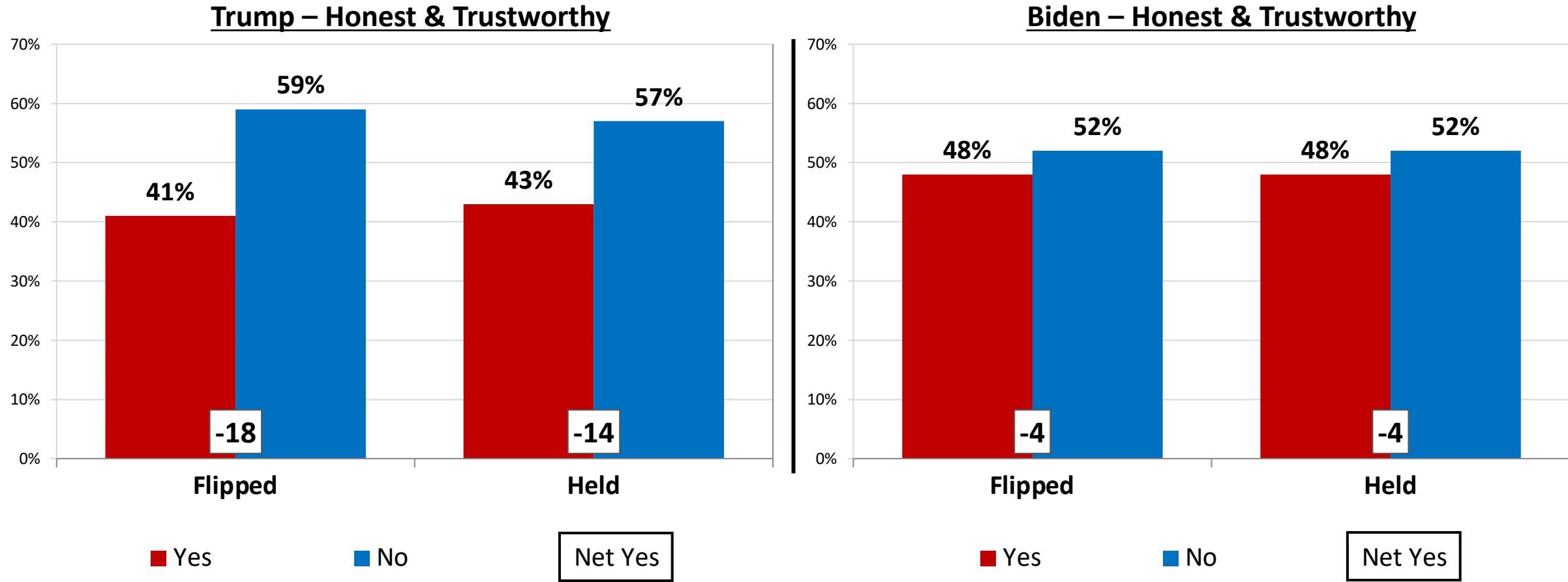
Favorable Unfavorable Don't Know

Net Favorable



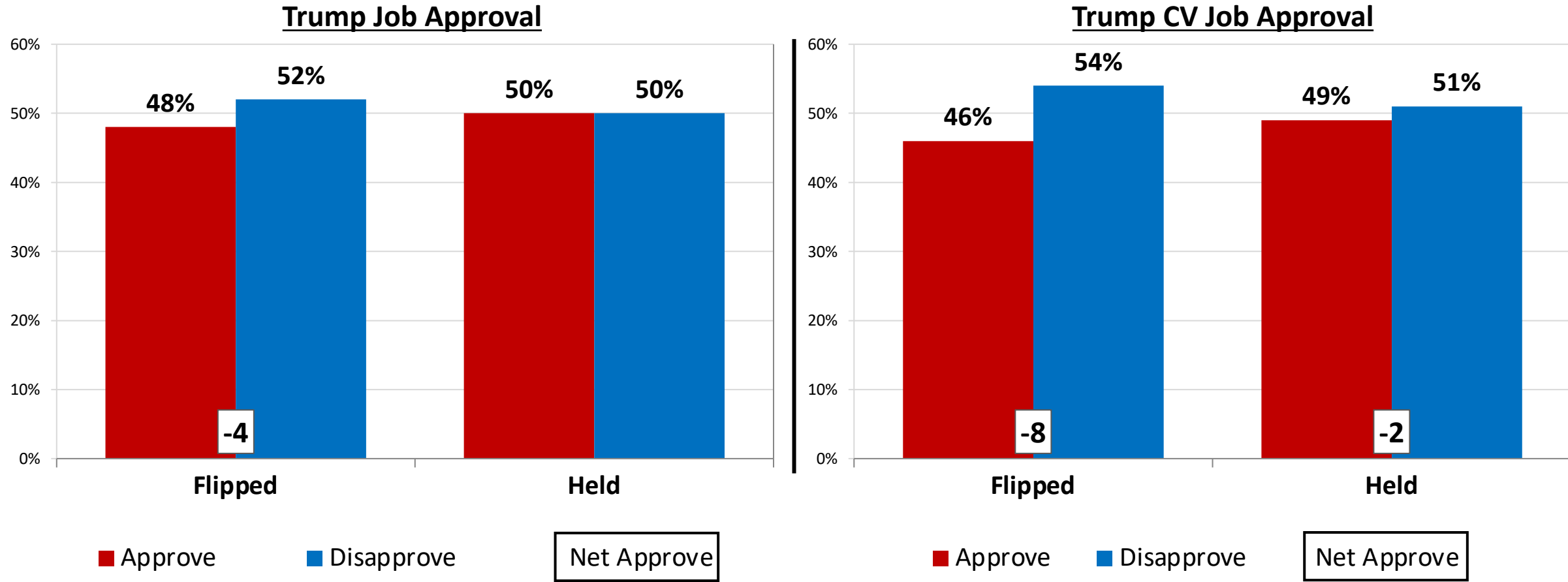
Trump & Biden Honest/Trustworthy

- Biden had a clear edge over POTUS on being seen as honest & trustworthy in both state groupings.



Trump Job Approval & CV Job Approval

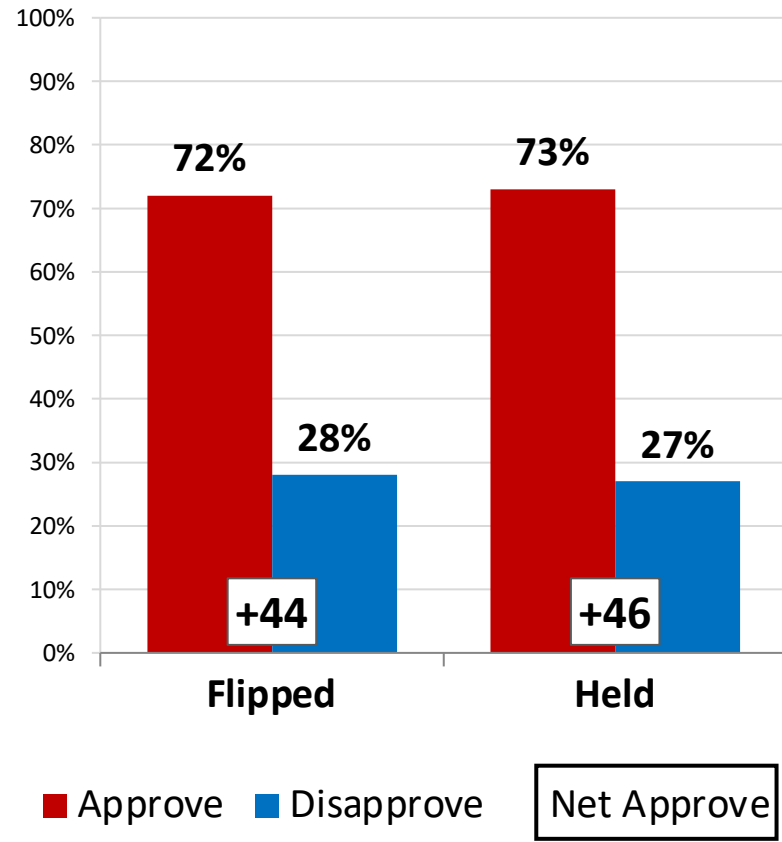
- POTUS's job approval was split dead even in the Held states, and narrowly underwater in those that flipped.
- Marginally worse off on his CV job approval compared to his overall.



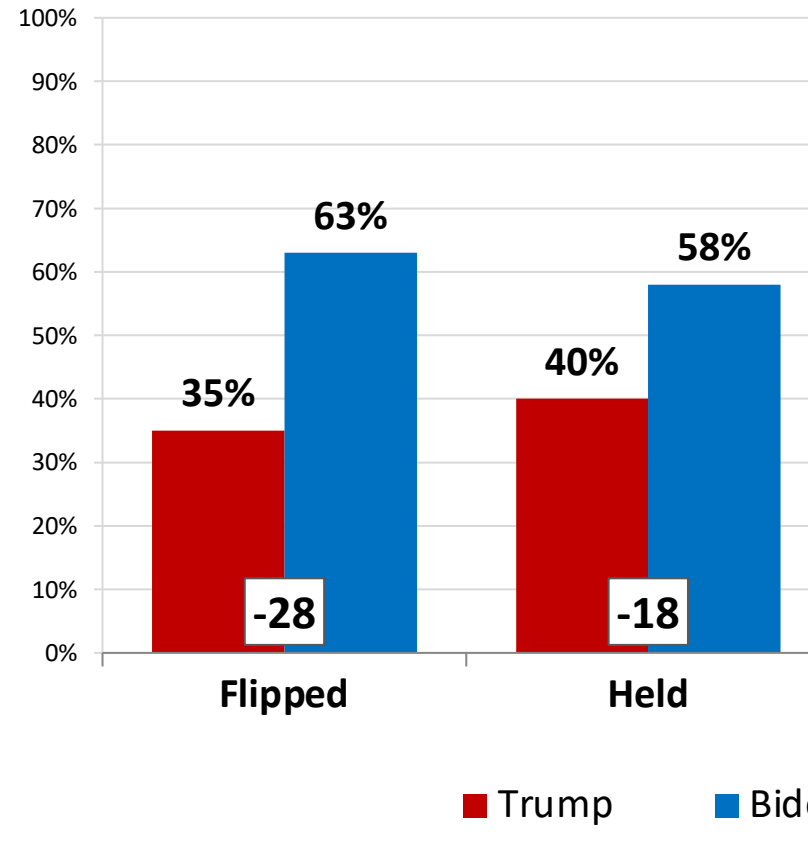
Fauci CV Job Approval

- Dr. Fauci had a very strong job approval in both groupings, with nearly 3-in-4 voters approving of the job he did.
- Biden won those who approved by significant margins, especially in the states that he flipped.

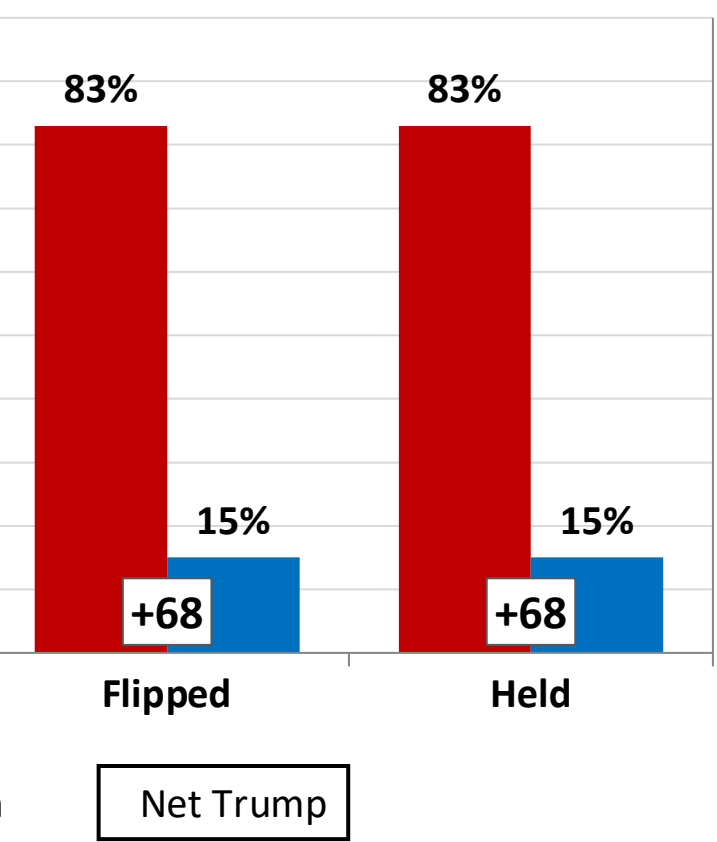
Fauci CV Job Approval



Vote – Approve Fauci



Vote – Disapprove Fauci

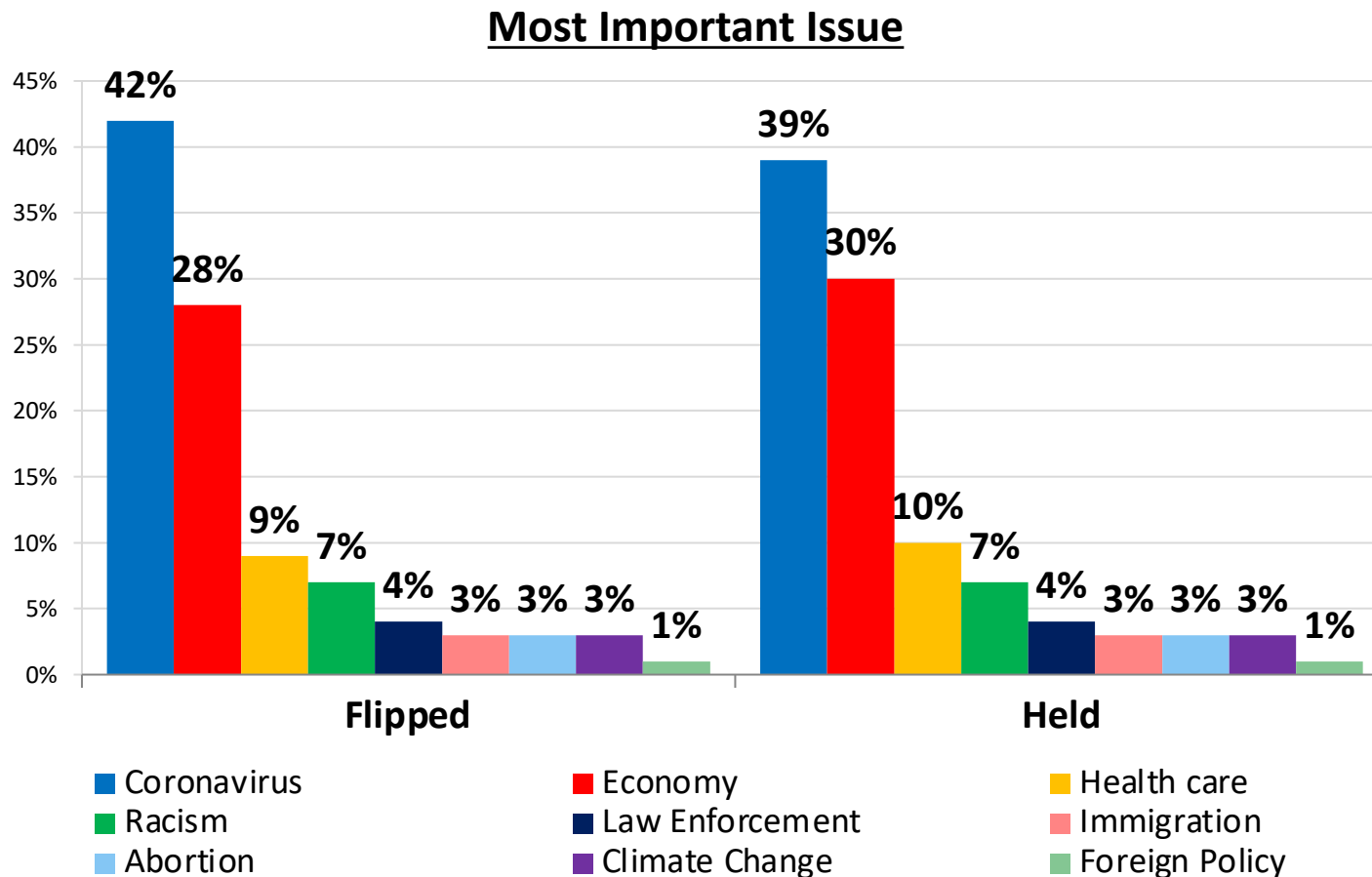


Issues and Impacts



Most Important Issue

- Coronavirus was the most important issue followed by the economy. Significant falloff after those two big issues.
- While POTUS dominated among voters focused on the economy, Biden won Coronavirus voters, which was a bigger share of the electorate, especially in the Flipped states.



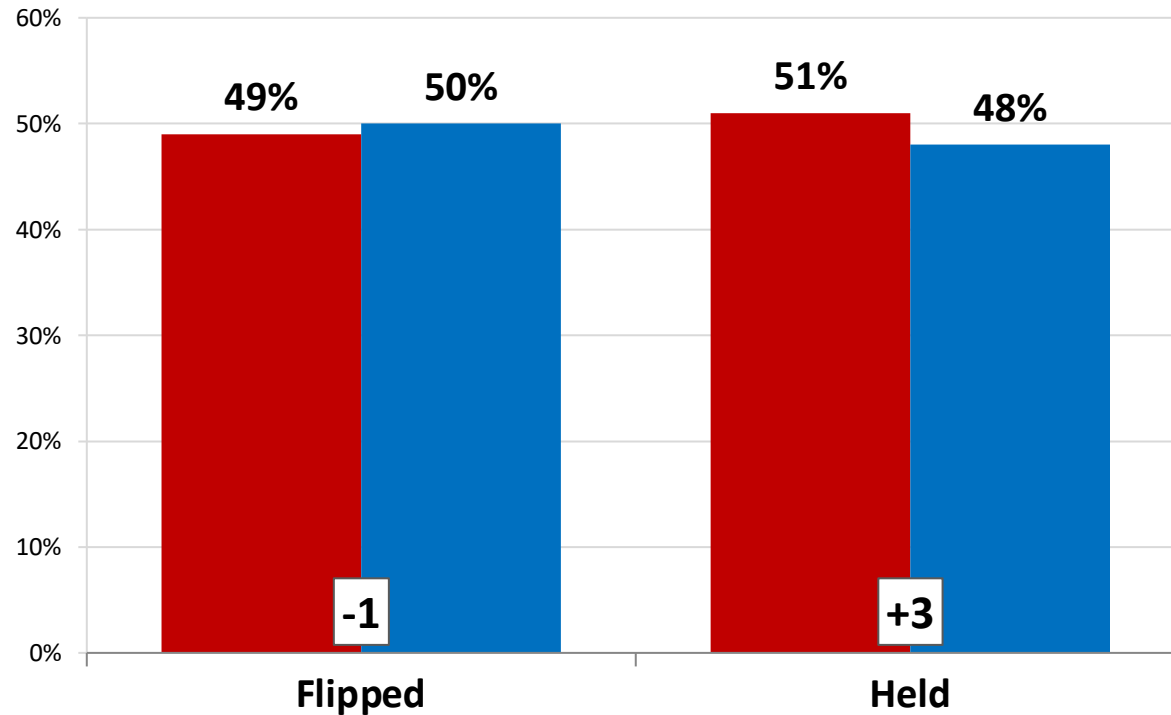
	<u>Flipped</u>			<u>Held</u>		
	Trump	Biden	Net Trump	Trump	Biden	Net Trump
Coronavirus	26	73	-47	28	71	-43
Economy	84	15	+69	85	13	+75
Health care	34	64	-30	38	61	-23
Racism	18	80	-62	22	76	-54
Law Enforcement	82	17	+65	81	17	+64
Climate Change	15	82	-67	15	83	-68



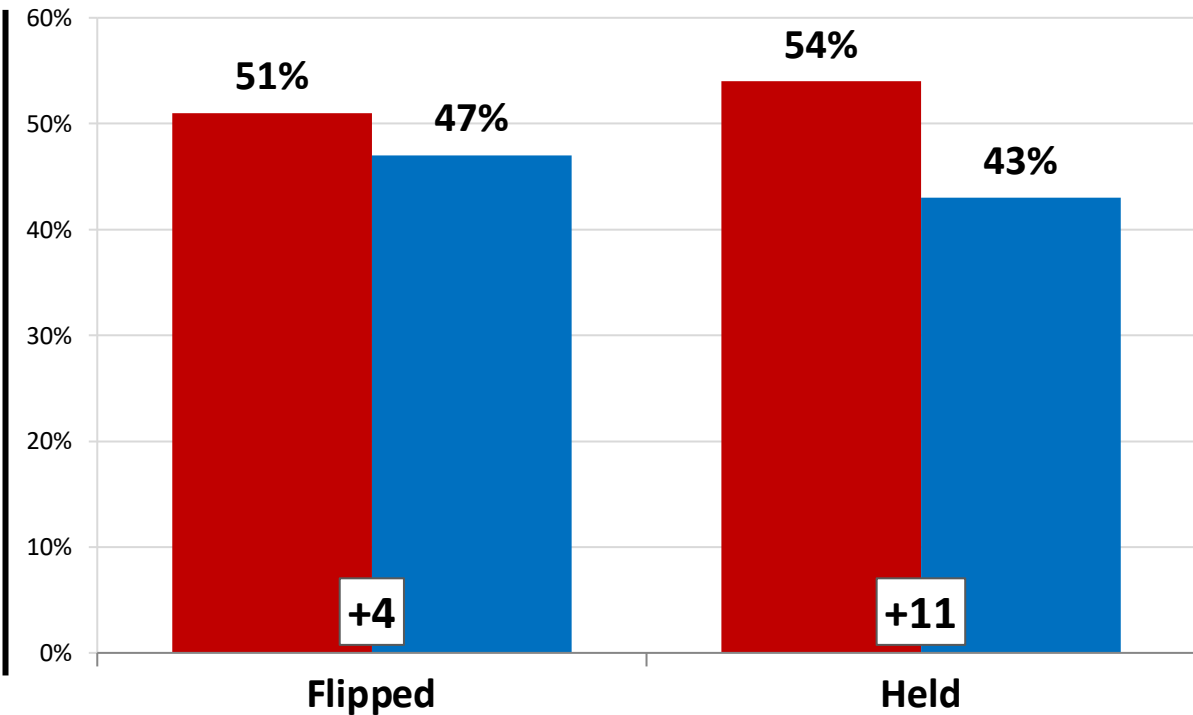
Impact of the Economy

- Opinions of the state of the economy were mixed rather than an area of strength.
- POTUS's edge on the economy was more defined in the states we held vs. those that flipped.

State of Economy



Better to Handle Economy



■ Excellent/Good ■ Fair/Poor

Net Excellent/Good

■ Trump ■ Biden

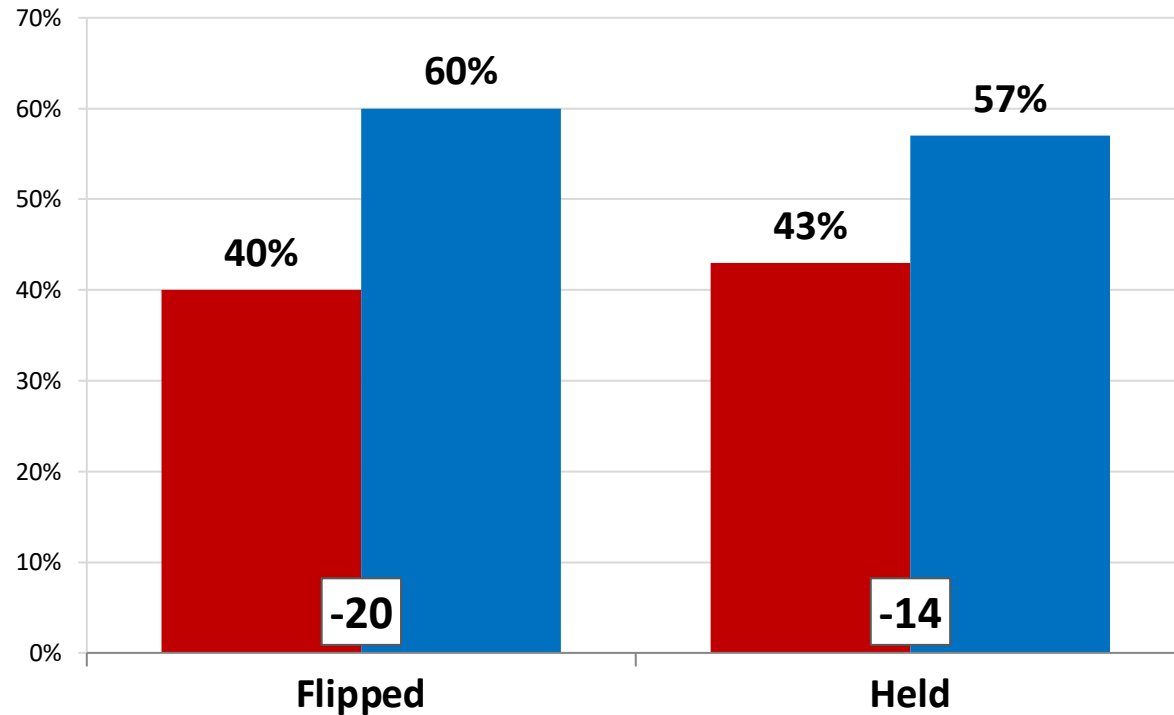
Net Trump



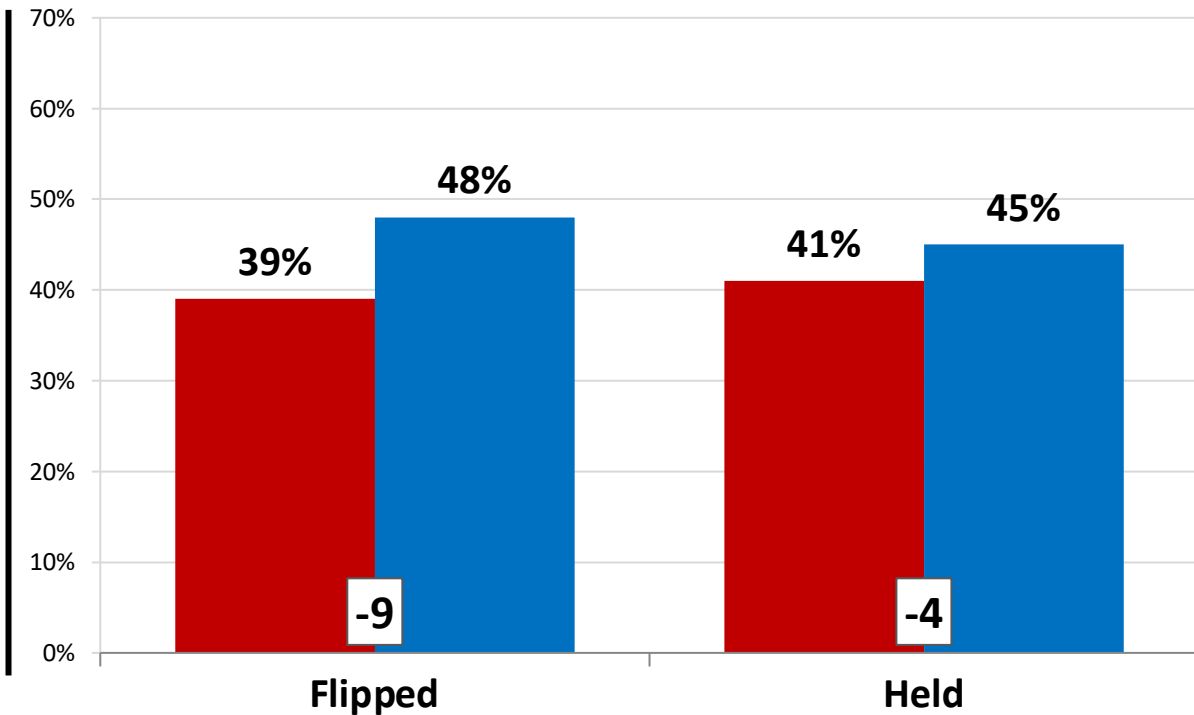
Impact of Coronavirus

- Voters prioritized stopping the spread of coronavirus over reopening the economy in both groupings, larger in the states that flipped.
- Biden was seen as better to handle coronavirus than POTUS by 9-points in the Flipped group and 4-points in the Held.

Prioritize Economy or CV



Better to Handle CV



■ Fix Econ/Spread CV ■ Limit CV/Damage Econ Net Fix Econ

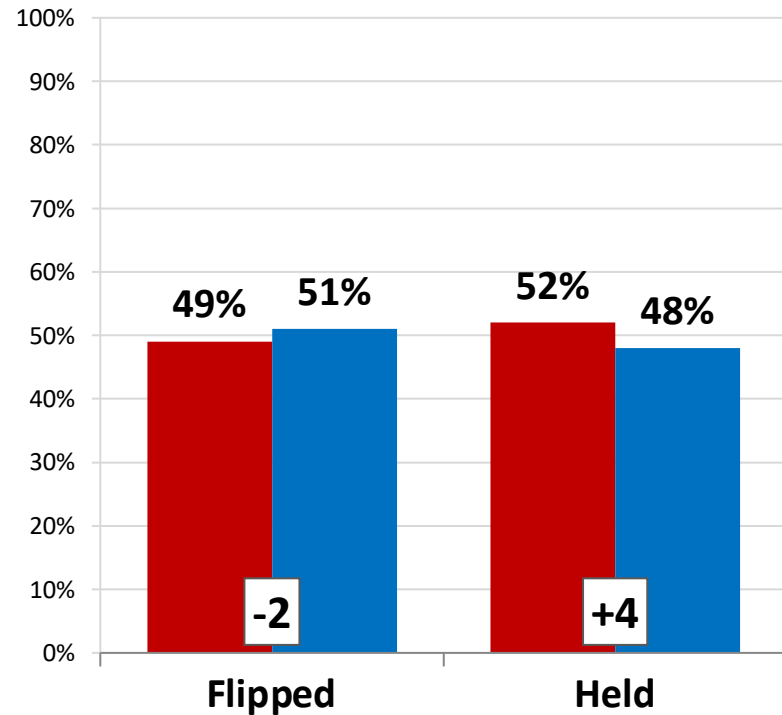
■ Trump ■ Biden Net Trump



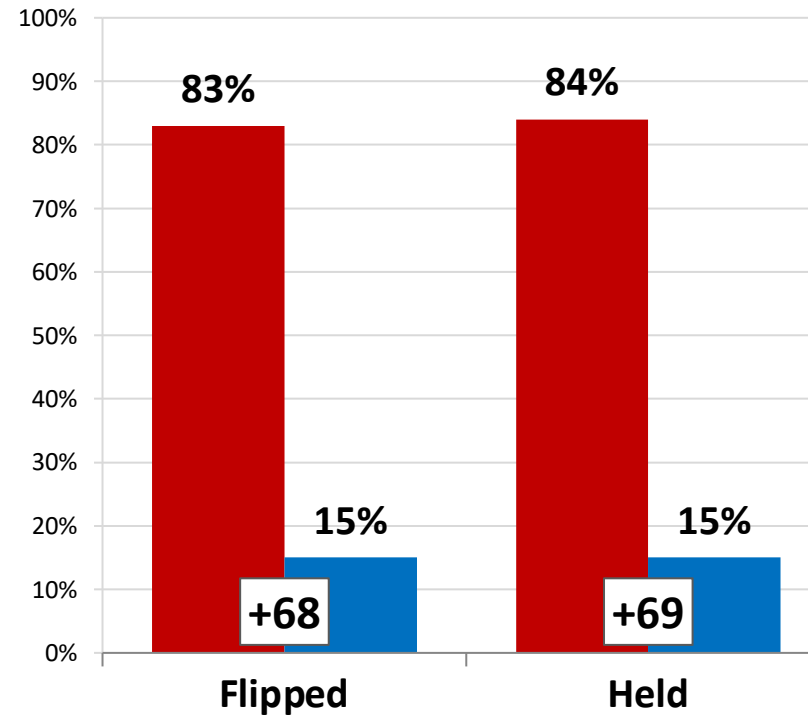
Impact of Perceived CV Level of Control

- The electorates were divided on whether CV was at least somewhat under control when they went to vote in November, slightly better in the Held states.
- Perception of control was closely linked to vote, with POTUS doing well with those who thought it was under control, but Biden winning most of those who said not at all under control.

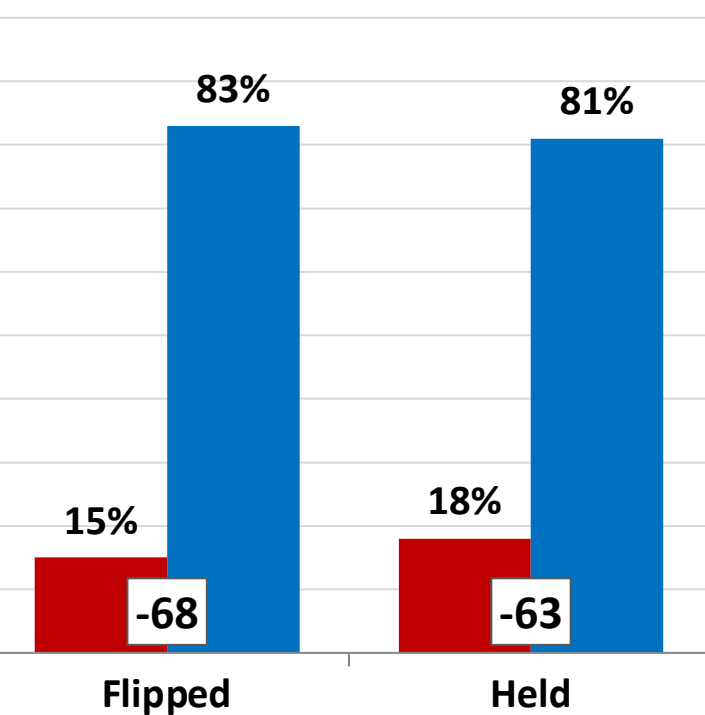
Level of CV Control



Vote – At Least Smwt Under Control



Vote – Not at All Under Control



■ Completely/Mostly/Smwt ■ Not at All Net Control

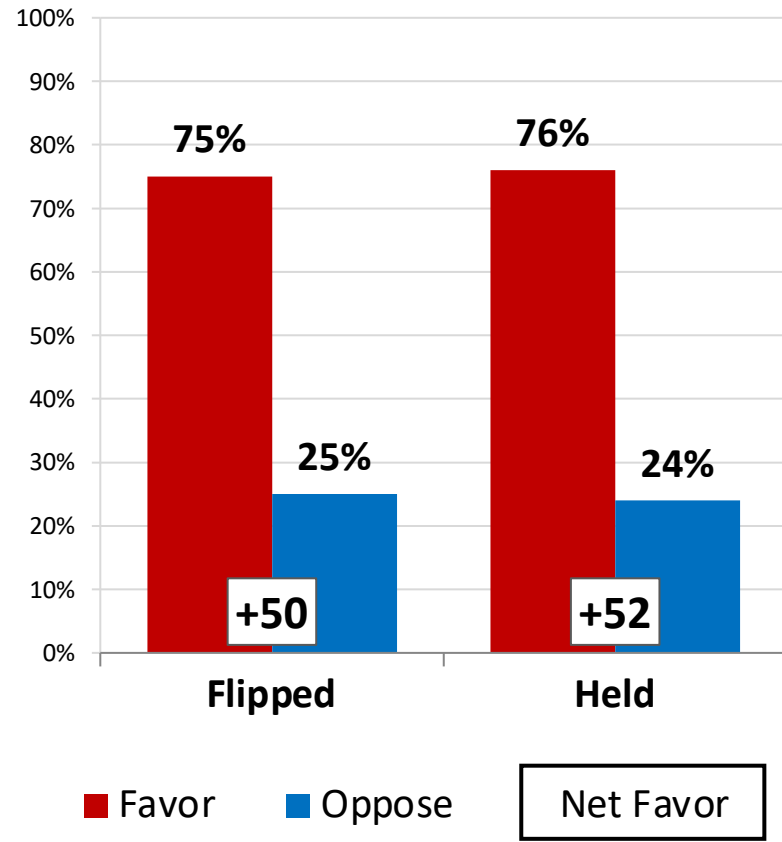
■ Trump ■ Biden Net Trump



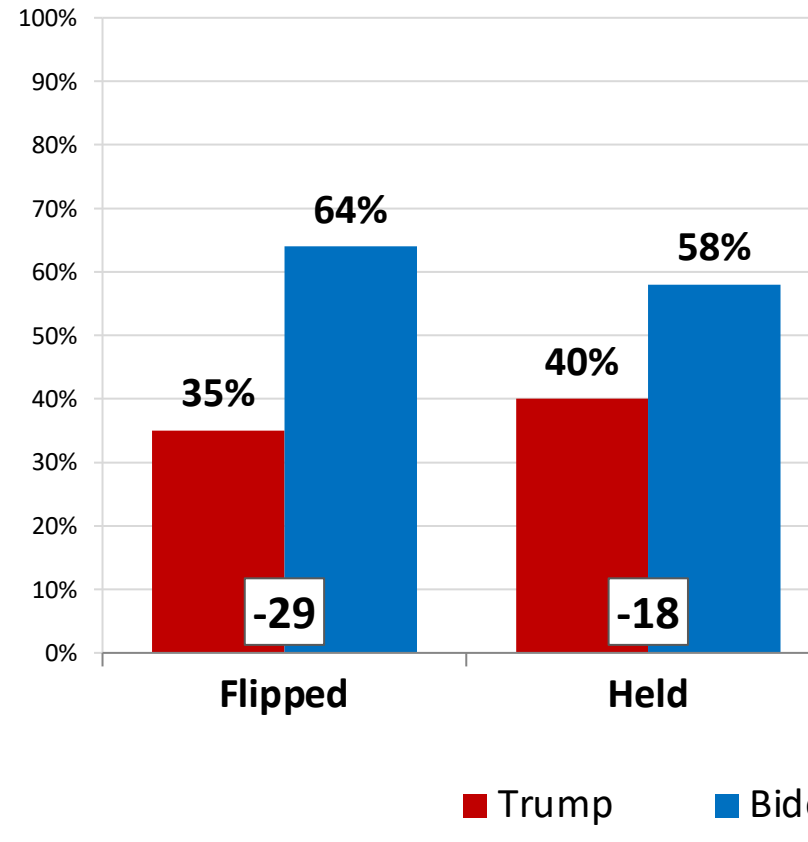
Mask Mandates

- Three quarters of voters favored mask mandates both in the Flipped and Held groups.
- Biden ran up the score with this large majority of voters, especially in the states that flipped.

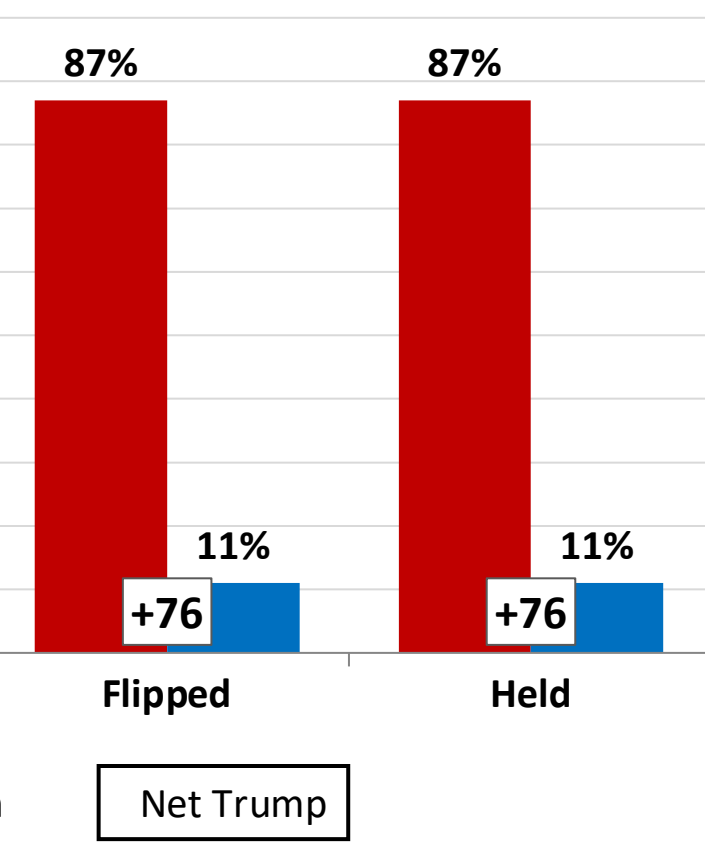
Public Mask Mandates



Vote – Favor Mandate



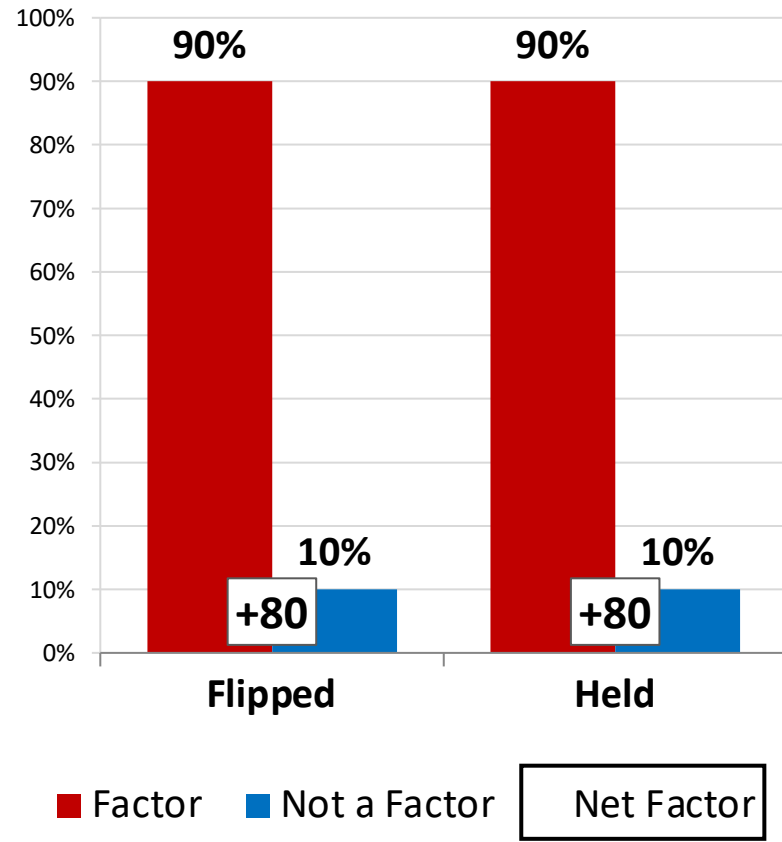
Vote – Oppose Mandate



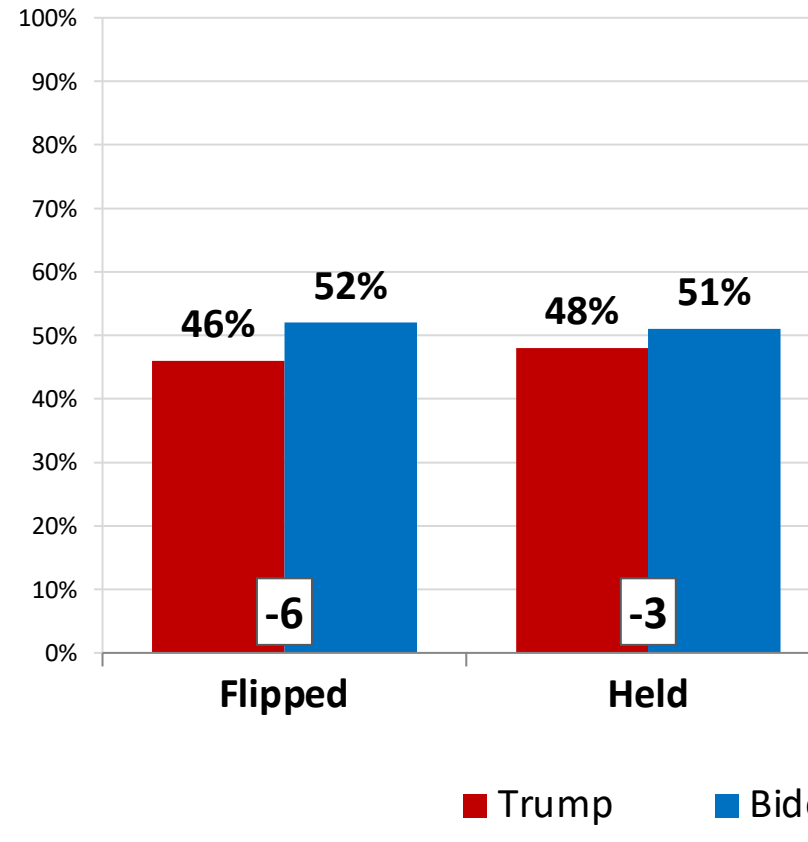
Impact of Supreme Court

- While the vast majority of voters said the Supreme Court was a factor in their vote, POTUS did worse among this group than he did among those who said it was not, a change vs. four years ago.

Factor in Vote



Vote – SC Factor in Vote



Vote – SC Not a Factor in Vote

