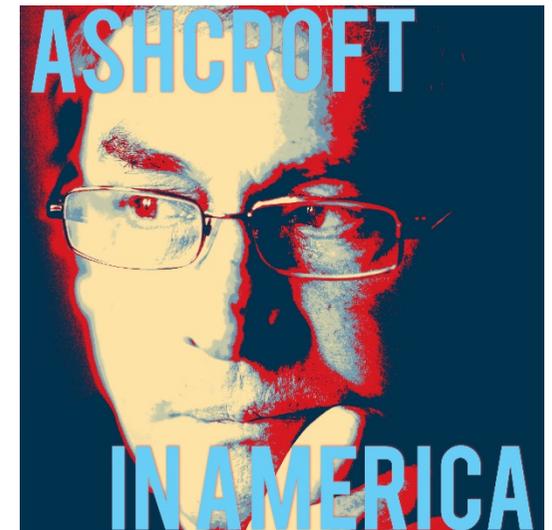


TRUMP'S FINAL COUNTDOWN?

American public opinion a year before the 2020 presidential election

Lord Ashcroft KCMG PC
November 2019

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METHODOLOGY

15,051 adults in the United States were interviewed online between 1 and 15 October 2019. Data have been weighted to be representative of all adults in the United States. Full data tables are available at LordAshcroftPolls.com

Focus groups with voters from a range of backgrounds and voting histories were held in Bedford, NH, Pittsburgh, PA, and Atlanta, GA between 20 and 23 October 2019.



THE AMERICAN ELECTORATE

Our survey shortly before the presidential election in October 2016 asked 30,000 Americans about their background, ethnicity, family, housing, education, health, work, income, religion, level of political interest and commitment, sources of news – among other things – as well their political views and attitude to social and cultural issues. Our analysis of the results identified ten distinct segments of voters within the American electorate, which fell into four clusters: the Democrat Core, Centrist Voters, Republican Partisans, and a more disengaged but dissatisfied group which we designated the Trump Targets.

We re-examined the segments after the 2018 midterm elections (see *Half-Time! American Public Opinion Midway Through Trump's (First?) Term*) and have done so again a year later. While each segments have grown or shrunk slightly from survey to survey, most of these changes have been within the margin of error. However, there appears to have been a small shift within the larger groups: the Democrat Core and Centrist groups have grown from 33% and 23% to 37% and 26% of the total electorate respectively, while the Trump Targets and Republican Partisans are down by a total of 8 points over the three surveys to a combined 36% of all voters.

	Segment descriptions									
	Democrat core			Centrist Voters		Trump Targets			Republican Partisans	
	Cosmopolitan Activists	Mainstream Liberals	Blue Collar Democrats	Melting Pot Moderates	Faithful Centre	Low Key Pragmatists	Losing Ground	Left Behind & Angry	Republican Mainstream	Fox News Militants
% of the population	11%	16%	10%	15%	11%	8%	13%	6%	5%	4%
% politically active	61%	44%	41%	36%	38%	35%	33%	35%	44%	50%
% planning to vote in primaries	82% Democrat	66% Democrat	46% Democrat 31% Republican	42% Republican 41% Democrat	50% Republican 32% Democrat	42% Republican 34% Democrat	46% Democrat	53% Republican	72% Republican	83% Republican
Most likely primary candidate	 Elizabeth Warren	 Joe Biden	 Joe Biden	 Joe Biden	 Joe Biden	 Joe Biden	 Joe Biden	 Joe Biden		
Trump approval	4%	14%	37%	45%	54%	49%	31%	63%	89%	96%
Two most important issues	1. Environmental issues & climate change 2. Healthcare	1. Healthcare issues & climate change 2. Environmental issues & climate change	1. Healthcare 2. The economy & jobs	1. Healthcare 2. The economy & jobs	1. Healthcare 2. Immigration & border control	1. Healthcare 2. Immigration & border control	1. Healthcare 2. The economy & jobs	1. Immigration & border control 2. Healthcare	1. Immigration & border control 2. National security & defense	1. Immigration & border control 2. National security & defense
% optimistic on economy	31% for country 45% for family	43% for country 52% for family	60% for country 65% for family	69% for country 74% for family	68% for country 71% for family	57% for country 57% for family	46% for country 48% for family	64% for country 62% for family	86% for country 83% for family	90% for country 86% for family
Two most serious threats	1. Climate change 2. Inequality in American society	1. Climate change 2. Inequality in American society	1. Terrorism within US 2. The risk of a new economic & financial crisis Favour a progressive, liberal or a moderate, centrist Democrat	1. Terrorism within US 2. Division & polarisation in American society	1. Terrorism within US 2. Excessive immigration	1. Excessive immigration 2. Terrorism within US	1. The risk of a new economic & financial crisis 2. Climate change	1. Excessive immigration 2. Terrorism within US	1. Excessive immigration 2. Division & polarisation in American society	1. Excessive immigration 2. Terrorism within US
Most likely 2020 ticket	Very strongly favour a progressive, liberal Democrat	Slightly favour a progressive, liberal Democrat	Slightly favour a progressive, liberal or a moderate, centrist Democrat	Slightly favour moderate, centrist Democrat	Slightly favour Trump	Slightly favour Trump	Marginally favour a moderate, centrist Democrat	Strongly favour Trump	Very strongly favour Trump	Overwhelmingly favour Trump
% saying enough evidence to pursue impeachment	88%	70%	50%	39%	34%	36%	51%	25%	5%	2%

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Cosmopolitan Activists are disproportionately young and female, affluent, and the most likely to have a college degree. They are by far the most likely to share political information on social media, donate to campaigns, attend political meetings and campaign actively for candidates. They are the most liberal segment in their social and political attitudes.

Mainstream Liberals are more likely than average to be younger, female, and highly educated. They are significantly more likely than the population as a whole to describe themselves as liberal or very liberal, and more than half identify as Democrats.

Blue-Collar Democrats are the youngest segment, and are more likely than average to be female. They are less likely than most to have been to college, to be registered to vote or to take an interest in politics and public affairs. They have a lower household income than most segments. They are the most likely to be black or Hispanic, and almost half the segment is non-white. Though the segment contains twice as many Democrats as Republicans, the political outlook of its membership divides evenly between liberals, moderates and conservatives. Though supportive of immigration, same-sex marriage and marijuana legalisation, Blue-Collar Democrats differ from the two other Democrat-leaning groups by being pro-life, supportive of gun-ownership rights, and believing religion is being wrongly driven out of American life.

Melting Pot Moderates are among the least likely to be politically active or to take a close interest in public affairs. The segment is fairly evenly divided between Democrats, Republicans and Independents, and its members are more likely to describe themselves as moderate than either liberal or conservative. Two fifths of this segment are non-white. They are less likely than average to have been to college.

Members of the **Faithful Center** segment are neutral or divided on immigration, gun control and green energy, but strongly believe religion is wrongly being driven out of national life, are opposed to same-sex marriage and are the most pro-life outside the Republican Partisan groups. They are more likely than most to be African American.

Low-Key Pragmatists are more likely than average to be white and female. They are more likely than average to describe their political outlook as moderate, and twice as likely to be conservative than liberal. Members of this segment tend to think immigration and free trade deals have had a negative impact on the US in recent years. They are also in favour of same-sex marriage, marginally pro-choice, and in favour of defending gun ownership rights. They are less likely than average to have been to college.

The **Losing Ground** segment are generally pessimistic about life in the US. They are neutral or divided on controversial issues including immigration, same-sex marriage, gun control and the role of religion in political life, and have the lowest involvement in politics of any segment. They are the least likely to be registered to vote.

Members of the **Left Behind and Angry** segment are among the least likely to have a college education and have a lower household income than most segments. Almost half are aged 55 or over. They take an interest in public affairs and around half describe themselves as conservative, but they are not politically active. Members of this segment tend to think immigration has had a negative effect over recent years and to oppose same-sex marriage. They prioritise reducing energy costs over investing in green energy sources.

Republican Mainstream members are disproportionately white, male and married. More than half are over 55, they have an above average

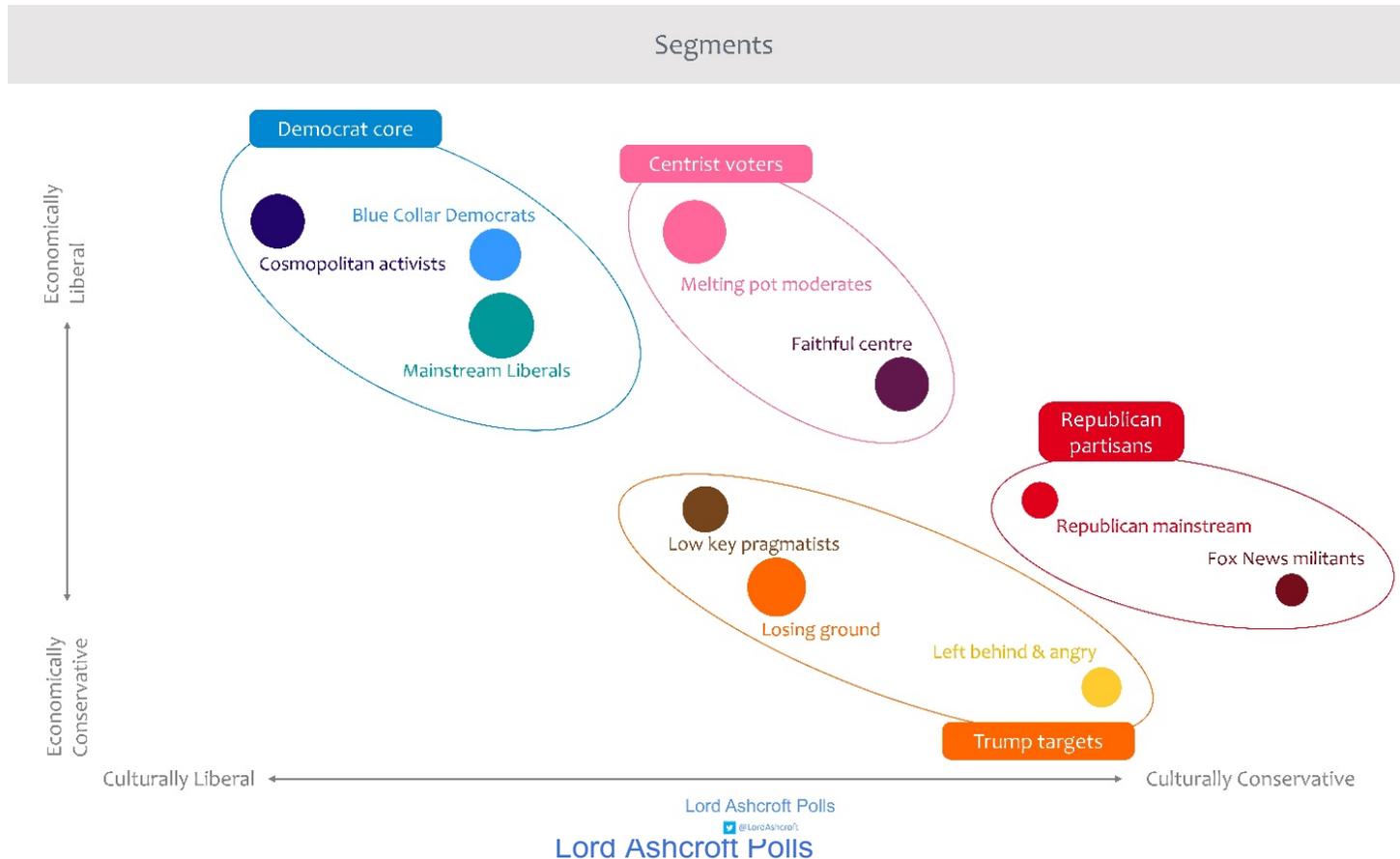


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level of education and are among the most likely to earn over \$100k. Three quarters described themselves as conservative, and almost two thirds as Republicans. They are more likely than average to be politically active.

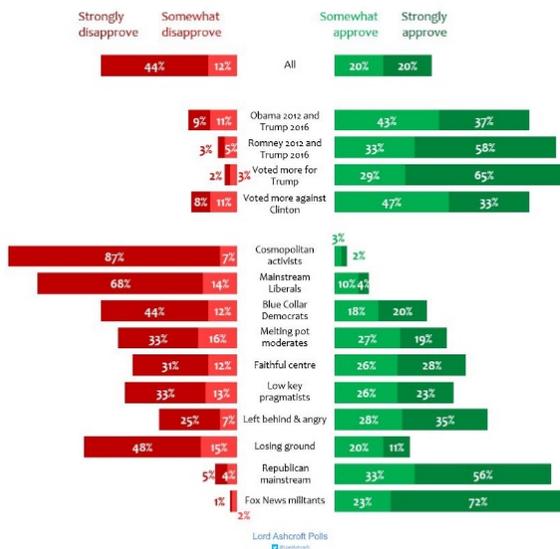
Fox News Militants are the oldest segment, and the most likely to be male and married and are also likely to be white. They have an above average level of education and are among the most likely to earn over \$100k. Nine in ten say they are conservative, and almost three quarters

described themselves as Republicans. They are the most likely after *Cosmopolitan Activists* to donate to or become involved in political campaigns. They have negative views about immigration, free trade deals, same-sex marriage, the growth of religions other than Christianity and the legalisation of marijuana and feel strongly that religion is wrongly being driven out of American life. They are the most pro-life, constructionist, and supportive of gun ownership rights and smaller government.



THE TRUMP PRESIDENCY SO FAR

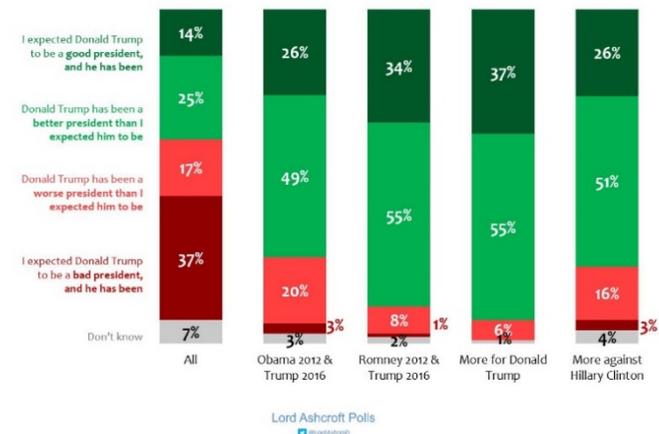
Thinking about the job Donald Trump is doing as President, do you:



Four in ten voters approve of the job Donald Trump is doing as president, with 56% disapproving (including 44% saying they strongly disapprove). Nearly nine in ten (89%) of those who voted for Trump in 2016 say they approve, though with some variations: while 65% of those who voted positively for Trump say they strongly approve, only 33% of those who voted mainly to stop Hillary Clinton say the same. Similarly, while 91% of Trump voters who backed Mitt Romney in 2012 say they approve, only 79% of those who switched to Trump from Obama say the same, with just 37% of Obama-Trump voters saying they strongly approve.

Trump's job approval is at 69% among those for whom Fox News is the most-watched TV news channel, compared to 34% among network news viewers, 22% for CNN viewers and 15% for those whose most-watched channel is MSNBC.

Which of the following best describes your overall view of Donald Trump's presidency so far?



Nearly four in ten Americans say either that they expected Trump to be a good president and he has been (14%) or that he has proved better than they expected (25%). More than half of Trump voters overall (53%) say he has exceeded their expectations, as do 61% of the *Fox News Militants* segment. However, one in five Obama-Trump voters and 16% of those who say they voted for him mainly to stop Clinton say he has turned out to be a worse president than they expected.

Asked to rate his performance on various measures, Americans give Trump's highest score for "having a clear idea of what he wants to



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achieve” (the only one on which he achieves a positive score among voters as a whole). For his 2016 voters, this is followed by “making things happen and getting things done,” and “making the right decisions even when they are unpopular.” His lowest rating overall is for “bringing the country together at difficult times.” Again, Obama-Trump voters and those who were voting mainly against Clinton give lower scores than Trump voters as a whole.

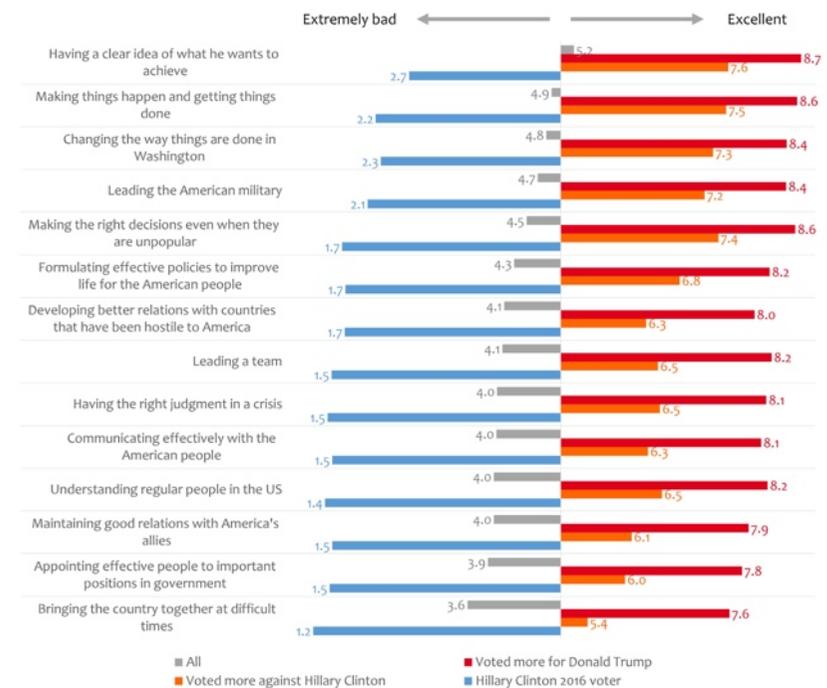
In our focus groups, those who had voted for Trump mainly to stop Hillary Clinton were largely pleased with what he had done so far as president, especially on the economy, tax, foreign policy, immigration and the Supreme Court. However, they often complained about his personal behavior: *“You knew what you were getting into, he acted like a two-year-old. But I’m it’s surprised it’s as bad as it is. I thought a lot of the antics would quit once he became president;”* *“He just comes unhinged once in a while. He could be more professional. It’s like he’s on a construction site;”* *“Arrogance, childishness, making fun of world leaders. This guy is running the country!”* *“What adult calls other adults names? And then his wife goes on an anti-bullying campaign.”*

Even so, most of these felt – as they did in 2016 – that they could live with these failings as the price of getting the policies and actions they wanted: *“Overall, he’s done better than I thought, but not his personality. But I’m not trying to hang out with him;”* *“We didn’t elect him to be presidential in the traditional sense.”*

However, a few were more disappointed by his performance, which they sometimes put down to the way he went about the job: *“He’s a master of finding good people and hiring them, but they all quit. He’s not a good manager;”* *“I’m disappointed he hasn’t done anything with infrastructure. I’ve seen zero;”* *“He could have been more moderate in*

the way he approaches his job. He’s haphazard in his hiring and firing;” *“The way he handled immigration is very crude. The way he talks about people of other races, his comments about rapists and murderers. It’s not completely false, but it’s very crude, very disappointing;”* *“He gets too distracted. He could have achieved a lot.”*

How would you grade President Trump's performance in each of the following areas, where 0 means "extremely bad" and 10 means "excellent"?
[NB mean score]



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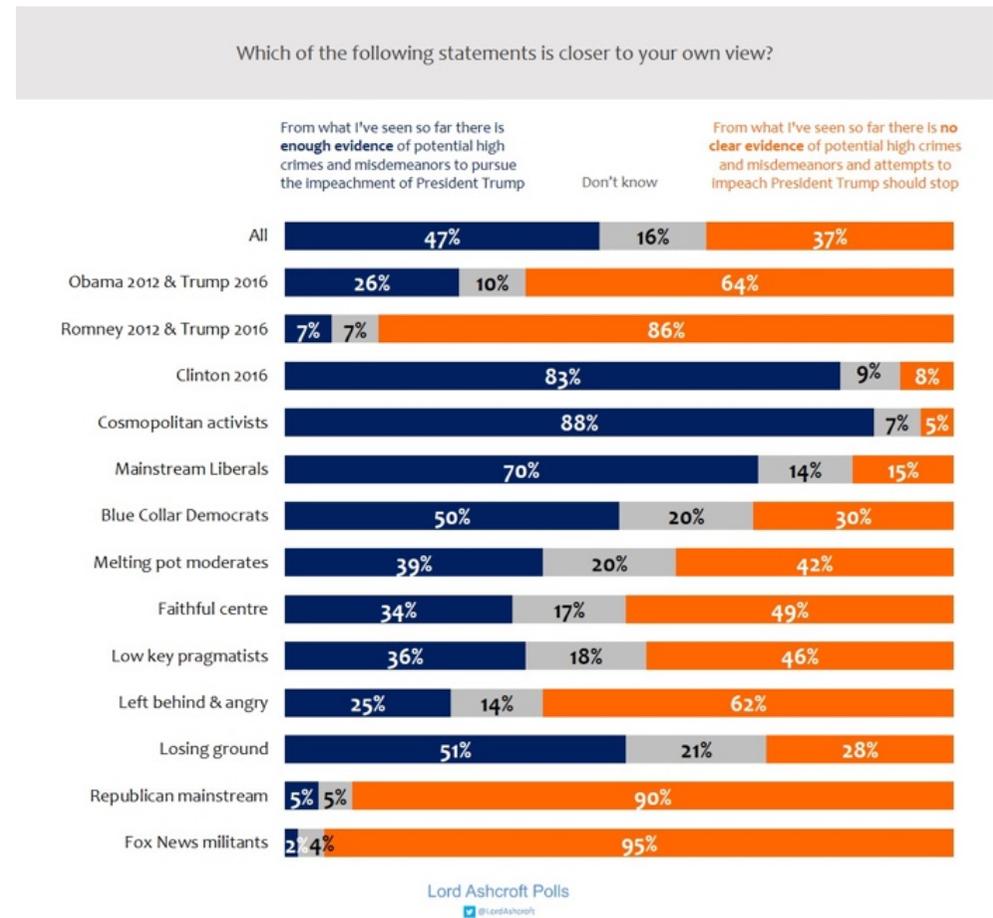


THE ISSUES AT STAKE

Impeachment?

For our focus groups, the potential impeachment of President Trump was the most immediate political issue of the day. Most Democrat participants strongly supported impeachment proceedings against President Trump. They often saw the specific allegation (“the Ukraine deal – ‘we’re going to hold the money until you get me something on Biden’”) as the latest example of a pattern of behavior: *“Why haven’t they done it sooner? He’s making a fool of all of us. It’s long overdue;”* *“He’s supposed to be for all the people, not his bottom line and his pocket and his family.”* Even though he would probably not be convicted by the Senate, impeachment by the House would still be the right thing to do, they argued: *“They had to do it. He makes Nixon look like an angel.”* They also hoped it would be an obstacle to his re-election: *“It will educate the public. Hopefully people will see the list of things he’s done getting longer and longer. Even if he can’t be impeached it will show people why he’s not a good candidate.”*

Some of Trump’s opponents had reservations, however: *“If it goes as planned and he gets kicked out, you put the devil in power. Mike Pence is the devil.”* They also feared that far from weakening Trump, the move would galvanise his support, while making Democrats complacent: *“It will invigorate the base. He’ll say corrupt Democrats are coming after him. The more attention he gets, they will feel like he’s the underdog and Democrats will think ‘we’ve got this’ and not turn up to vote. It’s a very dangerous situation.”*



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This fear was borne out by what we heard from most of our Trump-voting participants, even though their votes had been more against Clinton than for Trump. For them, impeachment was simply a continuation of the partisan “witch-hunt” that they thought had included the Mueller investigation and continued throughout his presidency: *“To me it’s like, oh, again?” From the time he took the oath of office they’ve tried to impeach him;” “It’s the next thing. It’s become one thing after another, getting something to blast Trump;” “An outsider got into office, so they’re all going to do whatever they can to get him out;” “It would be a big deal, just like Russian collusion would have been, but there’s no proof of anything.”*

While some of his actions may have been somewhat shady, this was by no means unique to President Trump: *“That’s what politicians do. Ethically I don’t think it’s great but that’s what they all do;” “So much has come out, especially on Hillary Clinton, and there are no consequences.”*

Some said they thought the allegation sounded potentially serious but that the process seemed unfair: *“This one seems like more, but he should be able to see his accusers. They don’t want to go on the record and won’t even bring out the whistleblower;” “They’re using anonymous sources and hearsay;” “Nothing has been made public. Someone has put something into the slipper of the Democrats and it’s all anonymous.”*

However, a few Trump voters did think the evidence merited investigation: *“There could be some criminal undertones. Whether it’s*

impeachable or not will have to be looked at;” “I think it is. You can’t use your power to have another country investigate your opponent’s family. You just can’t do that.”

In our poll, just under half of Americans (47%) say that from what they have seen so far “there is enough evidence of potential high crimes and misdemeanors to pursue the impeachment of President Trump,” with 37% saying that “so far there is no clear evidence,” and 16% saying they don’t know. However, voters are heavily split along party lines: while 78% of Democrats think there is enough evidence to pursue impeachment, 76% of Republicans think there is not – though Obama-Trump voters are nearly four times as likely to think the evidence warrants impeachment proceedings (26%) as Romney-Trump voters (7%).

More Americans think those pursuing Trump’s impeachment “genuinely believe he has committed high crimes and misdemeanors” (56%) than that they “are doing so simply because he is their political opponent” (44%). However, 86% of Trump voters (though only 68% of Obama-Trump voters), 93% of *Republican Mainstream* members and 99% of *Fox News Militants* believe the latter explanation.



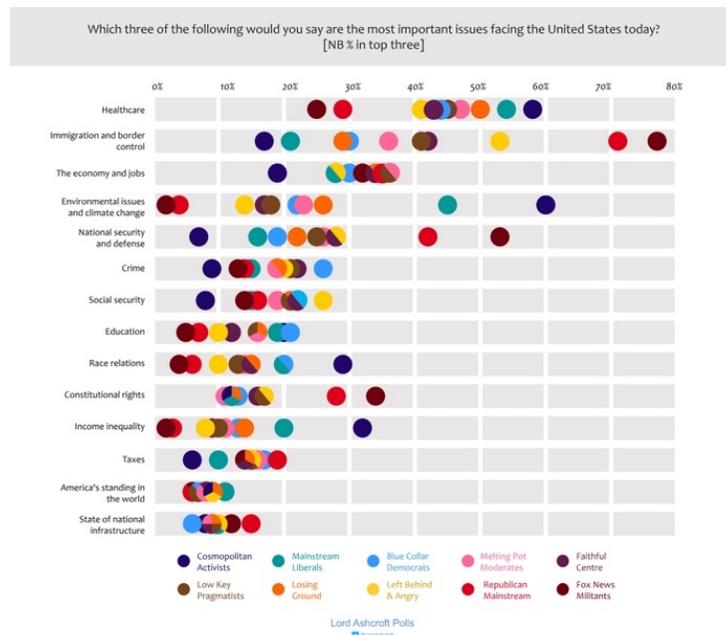
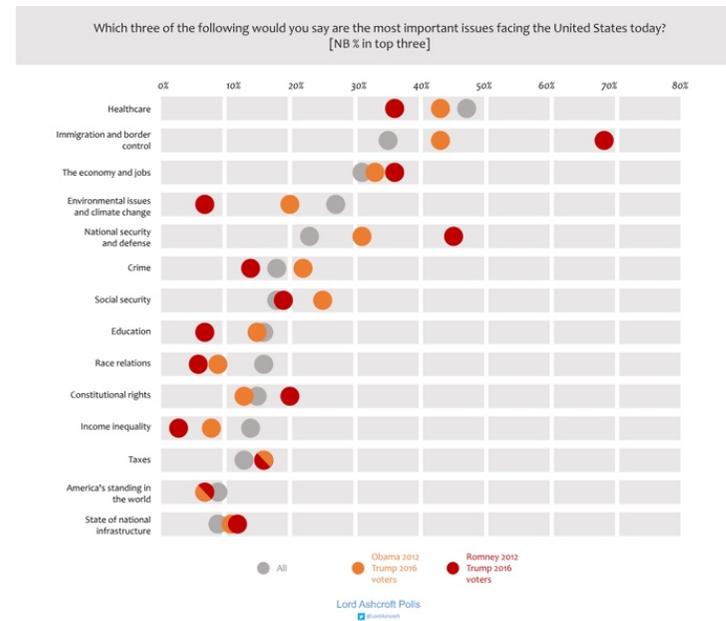
Most important issues

Healthcare heads voters' list of the most important issues facing the US today with 47% mentioning it among their top three, followed by immigration and border control (35%), the economy and jobs (31%), and environmental issues and climate change (27%).

While for Democrats the top three issues are healthcare, the environment and the economy, the equivalent list for Republicans is immigration, healthcare and national security and defense. Obama-Trump voters are more likely than Trump voters as a whole to prioritise healthcare, the environment and climate change, crime, social security and education.

For African American voters, the top three issues are healthcare, race relations and the economy and jobs.

These differences are even more stark when examined by segment. For *Cosmopolitan Activists* the most important issues are the environment and climate change, mentioned by 60%, followed by healthcare (58%) and income inequality (32%). At the other end of the spectrum, nearly eight in ten *Fox News Militants* (77%) name immigration and border control in their top three issues, with national security and defense second (53%) and constitutional rights third (34%).



The economy

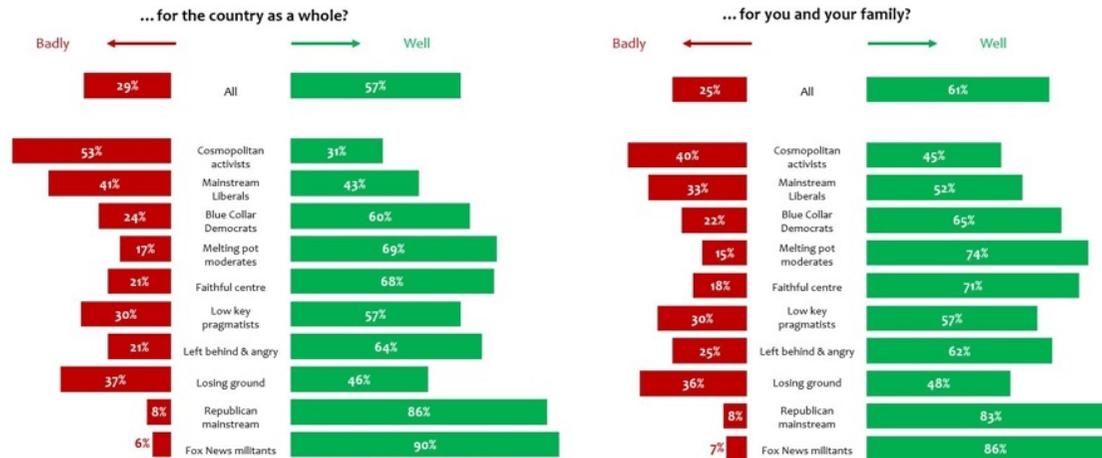
Most voters are optimistic for the American economy over the next year, though people are slightly more likely to think it will do well for themselves and their families (61%) than for the country as a whole (57%). This pattern is more pronounced among Democrats, 52% of whom are personally optimistic compared to 42% who think the economy will do well for the country. Republicans are much more optimistic on both questions, but are even more likely to be optimistic for the country as a whole (84%) than for themselves and their families (82%). Obama-Trump voters are slightly less optimistic than Trump voters as a whole both for themselves (77% expecting the economy to do well) and for the country (81%).

Most of those in our focus groups who had voted for Trump to stop Clinton felt things were going well: *"I'm trying to get back into full-time*

work and I feel there are more job opportunities than there were;" "My 401k is doing better;" "My company is giving more incentives;" "I think it's him. He has that business sense. When he got in, the stock market went up;" "He has personally stepped in numerous times to keep jobs here."

Some, however – particularly those who had voted for Obama in 2012 – were more doubtful: *"My paycheck isn't keeping up with the price of a loaf of bread and a gallon of milk;" "A lot has stayed the same. Most of the benefits from the tax cuts were at the top;" "I don't think the economy is what they say it is. I think it's worse. If someone worked three part time jobs, that used to be counted as three part-time jobs but now it's just counted as three jobs."*

Thinking about the economy - including things like jobs, wages, prices, taxes and interest rates - how do you think the American economy will do over the next year...



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Threats

Asked how serious they considered various threats to America today, Democrats were significantly more worried than Republicans about climate change, the risk of a new economic and financial crisis,

inequality in American society, and division and polarization – and slightly more worried about the prospect of military conflict with another country. Democrats and Republicans took the threat of terrorism within the US equally seriously, and Republicans were much more likely to regard excessive immigration as a serious threat.

How serious a threat is each of the following to America today, where 0 means it is not a threat at all and 100 means it is an extremely serious threat?
NB Mean score

	1st	2nd	3rd
Cosmopolitan Activists	Climate change 91	Inequality in American society 85	Division and polarisation in American society 80
Mainstream Liberals	Climate change 81	Inequality in American society 73	Division and polarisation in American society 72
Blue Collar Democrats	Terrorism within the United States 73	The risk of a new economic and financial crisis 71	Climate change 71
Melting Pot Moderates	Terrorism within the United States 64	Division and polarisation in American society 63	Climate change 61
Faithful Centre	Terrorism within the United States 70	Excessive immigration 66	Division and polarisation in American society 65
Low Key Pragmatists	Excessive immigration 72	Terrorism within the United States 71	The risk of a new economic and financial crisis 66
Losing Ground	The risk of a new economic and financial crisis 68	Climate change 68	Division and polarisation in American society 67
Left Behind & Angry	Excessive immigration 76	Terrorism within the United States 70	Division and polarisation in American society 62
Republican Mainstream	Excessive immigration 80	Division and polarisation in American society 69	Terrorism within the United States 66
Fox News Militants	Excessive immigration 86	Terrorism within the United States 68	Division and polarisation in American society 67

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THE DEMOCRATIC PRIMARIES

Democrat primary voters in our focus groups tended to put their 2016 defeat down to campaign tactics, complacency and problems with their candidate rather than anything more fundamental: *“She’s not a warm, fuzzy campaigner and there were some states she didn’t visit enough;” “She was judged differently because she’s a woman;” “A lot of people thought she’d get it and didn’t bother voting;” “They need to have a clearer message. What Hillary didn’t do was say why she wanted to be president and what she could do;” “Hillary was a terrible candidate. It was a horrible campaign. She didn’t go to Wisconsin. The emails. She was just corrupt from head to toe.”* Some felt the other side had done a better job of getting their message across to people who might otherwise have voted for the Democratic ticket: *“Republicans are good at framing techniques to make complex problems seem very simple and to trigger an emotional and angry response. So many Democrats are intellectuals, they have a real problem communicating with blue-collar people. Republicans have mastered the art.”*

Trump voters usually had a different take on the lessons the Democrats could have learned from 2016: *“They didn’t realise how much people wanted change. When I saw Trump was a candidate I couldn’t believe it, but that’s how much of a change people wanted after Obama.”* Many felt that Clinton’s description of some Trump voters as “a basket of deplorables” had been directed at them, and was a message they continued to get from the president’s opponents: *“She was talking about us. I think she was talking about the working class people;” “That’s what people still like to throw at us because we voted for Donald Trump;” “She established herself as being more of an elitist than people*

thought. They have this platform of ‘don’t forget the poor and the lower middle class’ and then alienated the majority of them;” “They preach compassion and understanding but only if you agree with them;” “Years ago the Democrats were the working man’s friend, but I don’t think that any more.”

Our poll found that among voters who expect to vote in the Democratic primaries and who backed Hillary Clinton over Bernie Sanders in 2016, the single most important attribute in choosing a nominee for 2020 is that “they stand the best chance of beating Donald Trump.” For 2016 Sanders voters, being the most likely to beat Trump is ranked slightly behind having the right priorities for the country, having

On a scale of 0 to 100, how important are each of the following qualities in determining who you are likely to end up voting for in the Democratic primary, where 0 means they are completely unimportant and 100 means they are very important indeed?
[NB mean scores, All expecting to vote in the 2020 Democratic Primary]

	All	2016 Clinton Primary voters	2016 Sanders Primary voters
1	They have the right priorities for the country 83	They stand the best chance of beating Donald Trump 85	They have the right priorities for the country 85
2	They have policies to make life better for me and my family 80	They have the right priorities for the country 84	They have policies to make life better for me and my family 82
3	They stand the best chance of beating Donald Trump 79	They have policies to make life better for me and my family 81	Their values seem in tune with my own 80
4	Their values seem in tune with my own 77	Their values seem in tune with my own 78	They stand the best chance of beating Donald Trump 79
5	They are likeable and I find them relatable 68	They are likeable and I find them relatable 72	They are likeable and I find them relatable 68

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the right policies to make life better for them and their families, and having values that seem in tune with their own. Likely Democrat primary voters as a whole rate being best placed to beat Trump marginally behind having the right priorities and policies for the country. Being likeable and relatable came fifth on the list for both groups.

Having an inspiring life story, having the chance to make history and “their likely appeal to people I don’t necessarily agree with” were all rated less important than these other attributes.

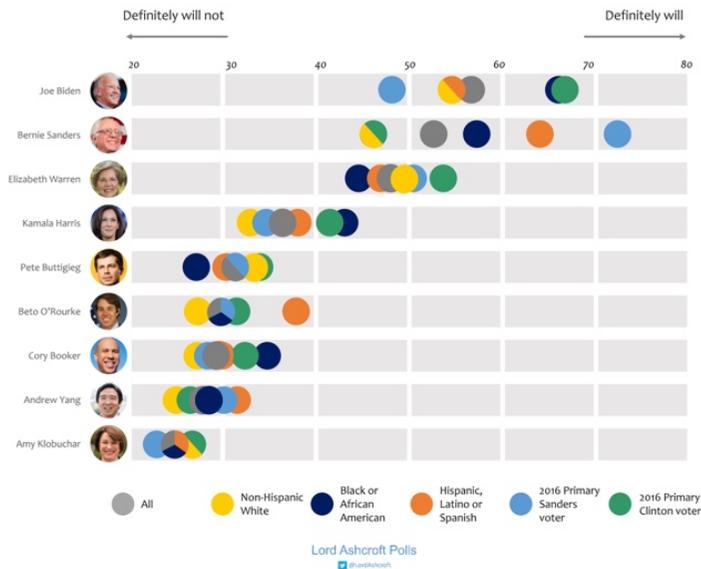
When we asked likely Democrat primary voters how likely they felt they were at this stage to vote for each of the main contenders, Joe Biden

achieved the highest average score (56.64/100), followed by Bernie Sanders (52.61), Elizabeth Warren (47.88) and Kamala Harris (36.46).

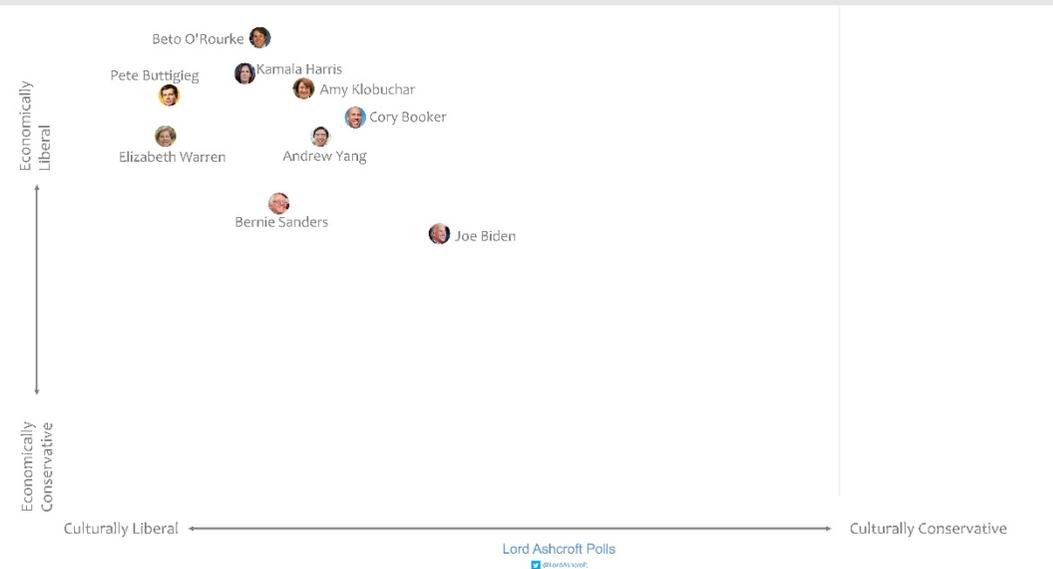
While Biden’s likely support was highest among African American voters and those who had backed Clinton in the 2016 primaries, he was third among 2016 Bernie Sanders voters behind Sanders and Elizabeth Warren.

Those describing themselves as moderate gave the highest likelihood score to Biden (though only 58.01/100), followed by Sanders (49.08) and Warren (42.67). Self-described liberals also gave their highest score to Biden (59.11), while those who consider themselves very liberal gave their highest average likelihood score to Warren (63.5), with Sanders (58.9) in second place.

On a scale of 0 to 100, how likely is it that you will end up voting for each of the following candidates, where 0 means you definitely will not vote for that candidate and 100 means you definitely will vote for that candidate? [All expecting to vote in the 2020 Democratic Primary. Mean scores]



On a scale of 0 to 100, how likely is it that you will end up voting for each of the following candidates, where 0 means you definitely will not vote for that candidate and 100 means you definitely will vote for that candidate?



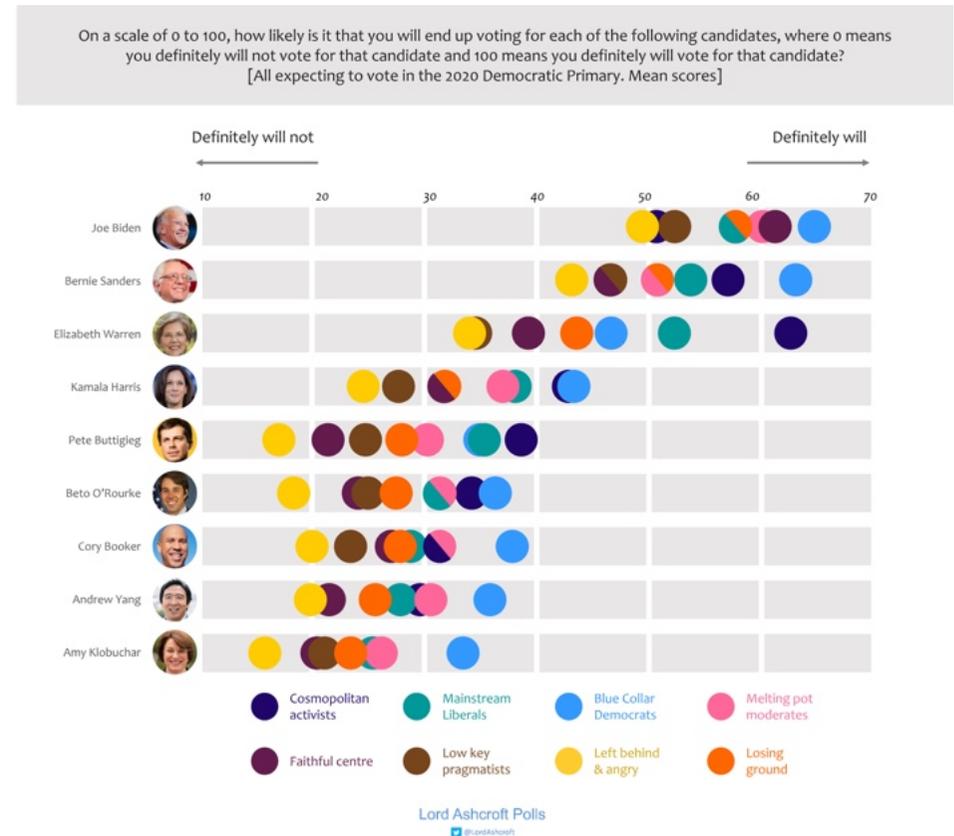
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As with the segments, we can plot the relative positions of likely Democrat primary voters currently most likely to support each of the candidates. Elizabeth Warren's peak of support is the most socially and culturally liberal, while Joe Biden's is the most conservative – though these are only relative terms, since Democratic primary voters is heavily centered in the top left quadrant of the map of the overall electorate.

Cosmopolitan Activists gave their highest likelihood scores to Elizabeth Warren (62.6) and Bernie Sanders (57.02). Likely Democrat primary voters in all other segments said they were currently most likely to vote for Joe Biden.

Despite being the frontrunner in most polls, **Joe Biden** inspired little enthusiasm among the Democrat primary voters in our focus groups. Though some thought he had been a good vice president, he had been around for decades and his age was showing, with “senior moments” becoming more frequent: *“He can't recall facts correctly, you sometimes can't follow what he's saying from one sentence to the next;”* *“A few years ago he was probably faster on his feet. Now it seems like he's always stumbling. He says things that are confusing. He does it all the time.”* He also seemed bereft of new ideas: *“He refers to things he did when Obama was president, but not what he's going to do.”* Several noted that despite trading on his vice presidency, Biden had received no endorsement from President Obama.

Despite the assumption that he can command widespread minority support, some African Americans in our groups had a very different view: *“He had a part in the Clinton crime bill. A lot of people are still in jail now because of what he did. He didn't oppose it, he voted for it, when Clinton was calling us super-predators.”*



While some of our Trump-voting participants saw Biden as the least threatening of the Democrat field, he had yet to generate any active support among them: *“He's like your uncle who came to Christmas dinner, but I don't think he has the intelligence for foreign affairs and the economy. I don't think he's a predator or anything but I don't think he has it in him to be president;”* *“He started out like a humble guy. But that's not how he is today, those days are long gone. After 40 years they get all the perks and forget where they came from;”* *“He's the creepy uncle. Bernie is the crazy uncle.”*



In our poll, Biden achieved his highest likelihood-to-vote score among 2016 Clinton primary voters (66.67/100), African Americans (66.01) the Blue-Collar Democrats segment (64.7) and those aged 65 or over (63.78).

Bernie Sanders retained a good deal of respect and affection among his 2016 supporters, and many on both sides thought he would have had a better chance of beating Donald Trump. However, many were now worried about his age and health: *“He might have some good ideas but he’s 78 years old and he’s just had a heart attack. Look at his hands. You’d be voting for his VP;”* *“I’m surprised he’s running again. He’s damn near dead.”*

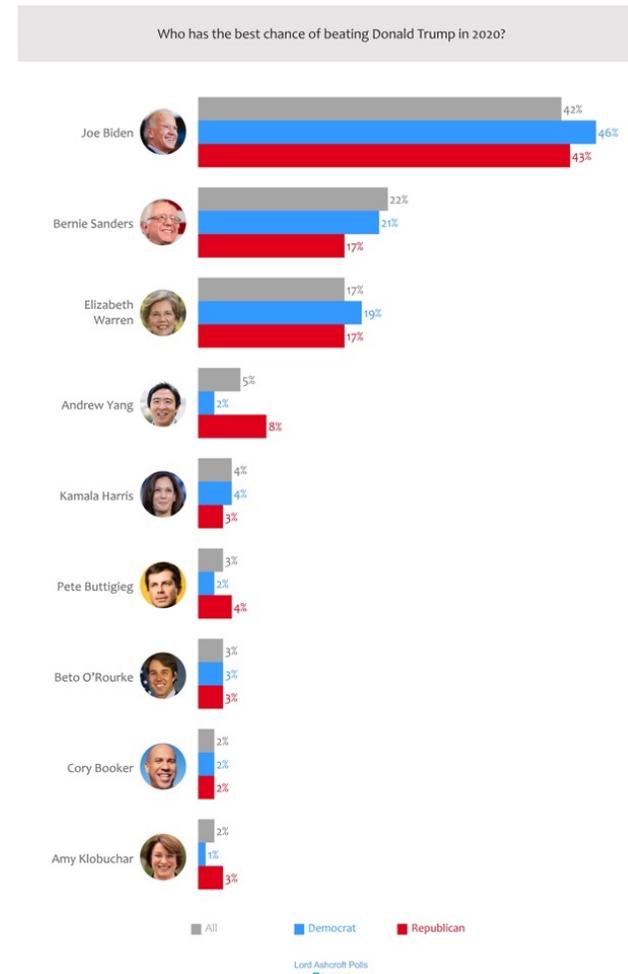
Some also felt he was too radical to attract the range of support he would need to win the presidency, and wondered how his plans would be paid for: *“Bernie was more in touch with people who get up and go to work every day and save their money. Now I feel he’s too over the top and too far left. People don’t want to lose all their private healthcare;”* *“Who’s going to pay for all that college?”* Despite being open to an alternative to the incumbent, Trump voters often found this worrying: *“I don’t understand when it became a bad thing to be successful, to work hard and be successful. He just wants to give, give, give;”* *“Show me the numbers, the books, where the money is coming from.”*

Our poll found the most likely Sanders primary voters to be socialists (74.82/100), 18 to 24 year-olds (71.01), Hispanic voters (63.99) and 25-24s (63.96).

Democrat primary voters were also sceptical about **Elizabeth Warren’s** plans: *“She hasn’t been specific about how she’s going to pay for universal healthcare and free college. I don’t think the country is ready to go that far;”* *“How much is it going to cost, her plan for health insurance?”*

Why can’t she tell us?” *“When she talks about student loans my ears prick up, but I don’t know if that’s even achievable.”*

Moreover, several had not warmed to her as a candidate: *“The stuff with her ancestry, her heritage. People feel that touting the Native*



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American thing was ridiculous;” *“She comes across as being shrill, a bit too energetic, and not presidential in demeanor.”* This was not a barrier for everyone, however: *“She’s not relatable to me but I can still look at a person and say they could run the country.”*

Trump voters from 2016 undecided how to vote in 2020 had similar reservations: *“She’s a mini-Sanders. Free! Free! Free!”* *“She’s different, she wants to help the middle class, but it’s not the right way of doing it – free education and health and no plan. You can’t keep going after Wall Street. There would be more lay-offs, the market would fall. It’s not a good idea.”*

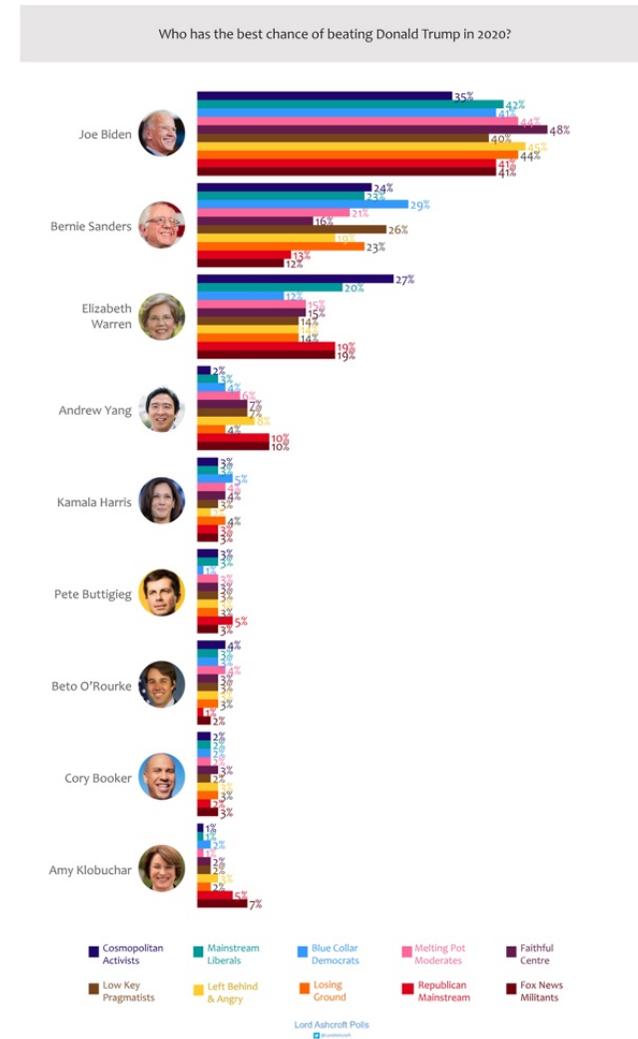
In our poll, Warren’s most likely primary voters were MSNBC viewers (64.94/100), those describing themselves as “very liberal” (63.5), and Cosmopolitan Activists (62.6).

Few had strong views about **Kamala Harris**, but of most of those expressed by our Democrat primary voters in New Hampshire were negative: *“She’s full of crap. She tells people what they want to hear. She was a DA out of California, she’s trying to appeal to the black vote, but she’s behind three strikes. No thanks;”* *“I don’t like her. She was prosecuting people for marijuana stuff.”*

African American voters in Atlanta were clear that their support for minority candidates should not be taken for granted: *“It seems phony. It seems she and Cory [Booker] are in over their heads. They’re just selling us the pretty picture, nothing seems realistic. It seems like I’m being played when I listen to them;”* *“It’s ‘I’m black so get the church buses lined up’. We’re not a monolith, we disagree with each other all the time.”*

Pete Buttigieg was the candidate most likely to be mentioned positively and spontaneously: *“I like Mayor Pete. He’s from the Midwest, moderate, can get people out, and he’s a veteran which is awesome. It’s hard for*

Trump to criticise him in the debate because he dodged his military service;” *“He’s grounded, he can talk to the public. I have a good feeling about him. He comes across as likeable, he could be president;”* *“Pete*



talks about plans and how to fix the country. It's how Obama won – he's not running against the Republicans, he's running for America."

Some worried that his relative youth and inexperience might count against him: *"I like Mayor Pete but I'm not sure he would beat Trump. It's nice to have someone who can put together multiple sentences, but I'm just not sure he can be elected. He's young, unknown, doesn't have a lot of foreign policy experience... but then Donald Trump didn't, either;"* *"He's not presidential. He has a child's demeanor, like a teenager almost."*

There were also concerns that what people referred to as his "preference" might be an obstacle for some voters: *"I think Mayor Pete could get progressives and moderate Democrats behind him. It's harder for Republicans because he's gay. It will be a harder sell for Republicans*

unless they're fairly liberal Republicans;" *"I think he's absolutely brilliant, incredibly smart. He would make a good president. But honestly, I don't think the country is ready for a gay president with a First Man;"* *"That's beautiful, but he ain't going to make it."*

Democrats and Republicans are united in thinking that Joe Biden has the best chance of beating Donald Trump in 2020. However, those describing themselves as "very liberal" think this by a lower margin than most (and 18 to 24 year-olds and self-declared socialists believe Bernie Sanders is best placed to win). *Cosmopolitan Activists* also say Biden has the best chance of beating Trump, despite they are more likely to vote for both Elizabeth Warren and Bernie Sanders.

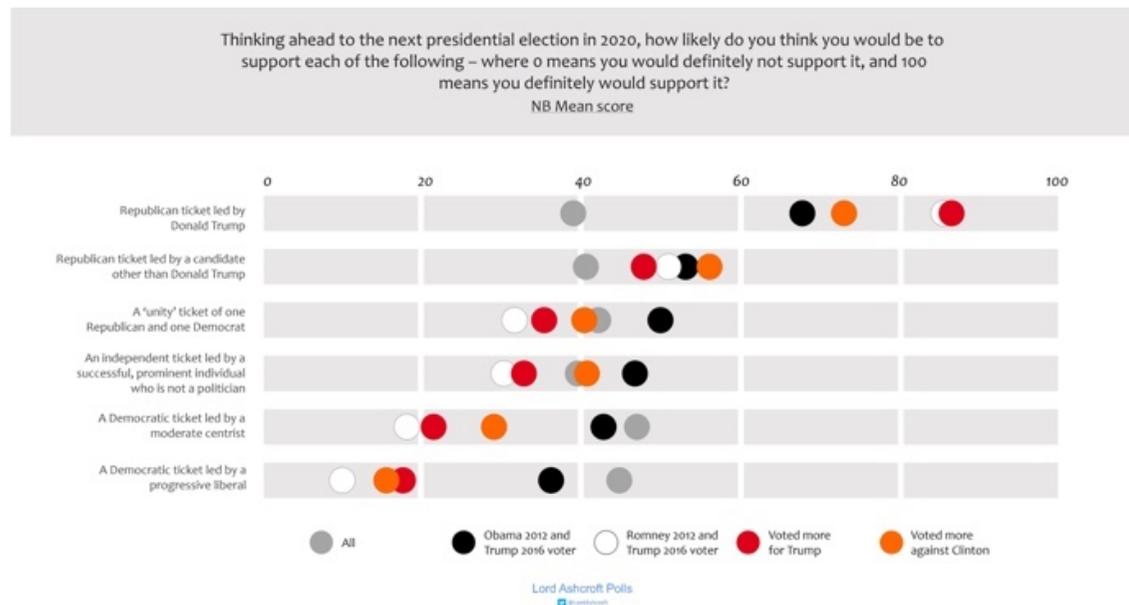


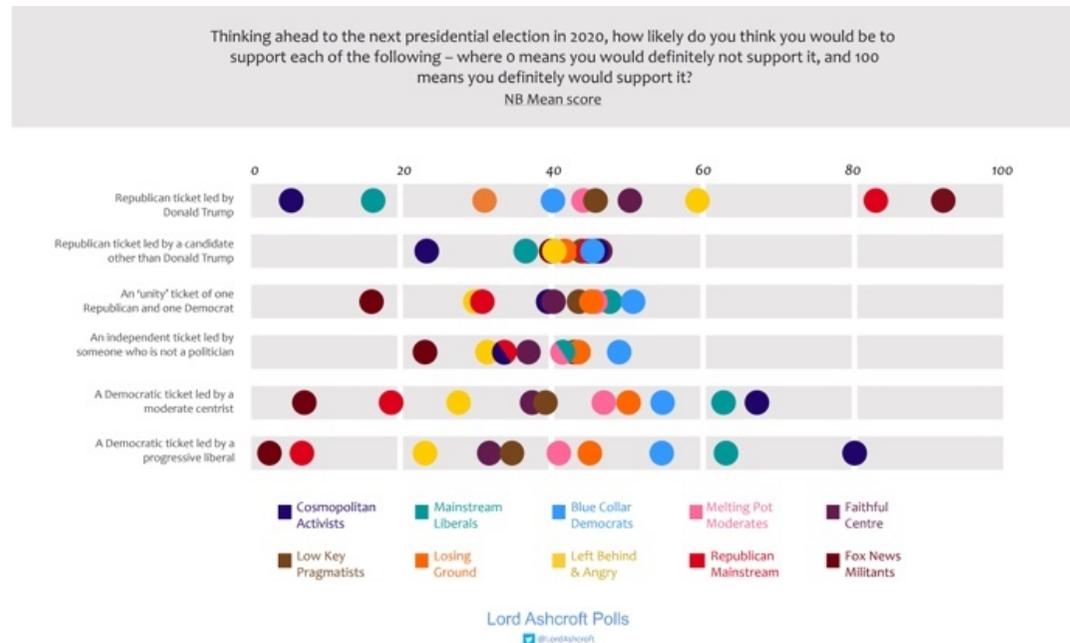
THE CHOICE IN 2020

Trump voters from 2016 put their likelihood of voting for a Republican ticket led by Trump in 2020 at an average of 80.92/100. However, this was higher among those who had voted positively for Trump (86.32) than those who had been voting mainly against Hillary Clinton (72.89), and higher among those who had previously voted for Mitt Romney (85.33) than among those who had voted for Obama in 2012 (67.88) –

though both of these less enthusiastic groups said they were more likely to vote for Trump than any of the other hypothetical tickets on offer.

Among voters as a whole, the highest average likelihood score was to vote for a Democratic ticket led by a moderate centrist.





Cosmopolitan Activists were most likely to support a progressive liberal Democrat (80.02/100), and were less enthusiastic about voting for a moderate centrist (67.12). *Mainstream Liberals* were roughly equally likely to back either Democratic ticket (63.03 for a progressive liberal, 62.71 for a moderate centrist), as were *Blue-Collar Democrats* (54.56 and 54.66).

Melting Pot Moderates said they were most likely to back a moderate centrist Democrat (46.88), but there was no clear lead. They gave slightly higher likelihood scores to voting for a unity ticket (45.8) and for Donald Trump (44.21) than for a progressive liberal Democrat (40.97).

Members of the *Faithful Center* considered themselves more likely to vote for a Trump ticket than any other, but only with an average likelihood of 50.34; they would be more likely to back a moderate centrist Democrat (37.42) than a progressive liberal one (31.79).

Low Key Pragmatists appear open to persuasion, with little difference between their most likely vote (a Trump Republican ticket at 45.8) and their lowest (a progressive liberal Democrat at 34.78).

The *Losing Ground* segment currently favored a moderate centrist Democrat over anything else on offer, though with a likelihood score of only 50.17, while the *Left Behind and Angry* group put their chance of voting for Trump (59.26) significantly higher than any other option.



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Members of the *Republican Mainstream* and *Fox News Militants* segments put their chances of voting for Trump at 82.81 and 91.71 respectively.

We asked how people would vote if the election were between Donald Trump and five of the current Democratic frontrunners (Biden, Warren, Sanders, Harris and Buttigieg). No filter was used for likely turnout, so the results are only indicative. However, in each case, the challenger beat Trump by between 12 points (Harris and Buttigieg) and 18 points (Biden).

While Romney-Trump voters said they would back the president by at around a 90-point margin in each case, one in four Obama-Trump voters said they would vote for Biden or Sanders against Trump, one in five for Warren, and 19% for Harris and Buttigieg.

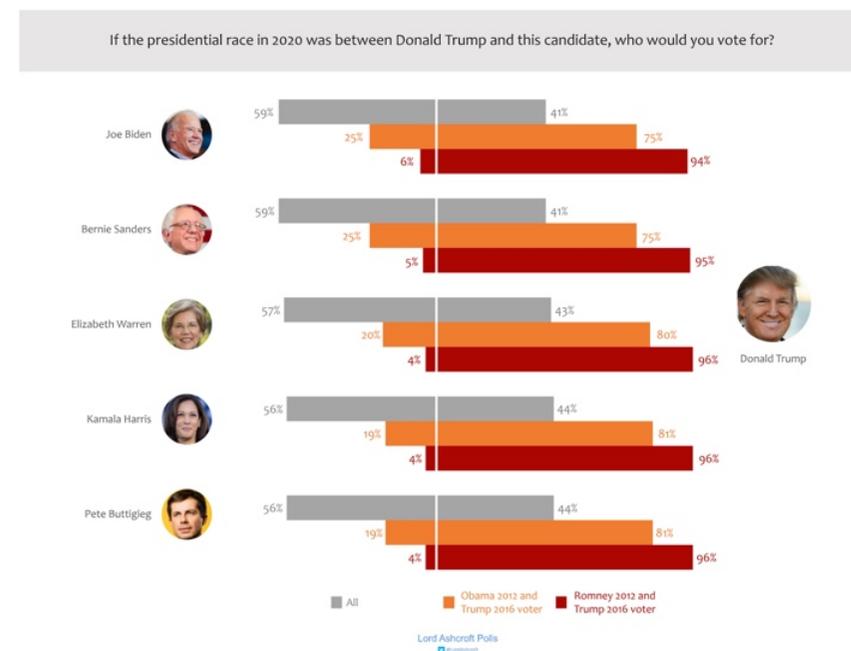
Trump voters in our groups often said he was doing a good job and deserved to continue: *"He's kind of like a new car. Four years later it's not still a great new car but it still gets you from A to B;"* *"People need more time. At least two terms to accomplish anything."*

Though many were open to an alternative, most had not yet focused on the Democratic candidates: *"I don't know who the frontrunners are because they change every three days;"* *"They haven't differentiated themselves. It's one person talking ten or fifteen times."* However, apart from the party's extreme dislike of President Trump, so far one message dominated from the Democrats: *"Their change is free education, free this, free that. That type of change destroys a country. We've seen it again and again in socialist countries. That type of change is not attractive to me."*

However, some had strong reservations about voting for him again and worried about what he might do in a second term: *"You've got to*

secure our borders and I'm for tariffs because the trade deficit is not good for the country. But I hear he's going after social security and Medicare. If he gets a second term he won't need Pennsylvania, Wisconsin, organised labor, so the gloves will be off;" *"He's a playground bully. Eventually someone will stand up and knock you down. Eventually he will push someone's button the wrong way;"* *"The military. He plays with them a lot, but he's not a military person and doesn't listen to his commanders. He's not paying attention;"* *"Talk about a space force. It's absolutely ridiculous."*

Some, though, had even stronger reservations about the prospect of a Democrat in the White House: *"I'm more scared about other parties, so it's the lesser of two evils;"* *"Taxes will be sky high. Jobs will go overseas because they will raise the corporate tax;"* *"More complacency. It would go back to the way it was before the upheaval that Trump has brought."*



Although several Trump voters said they were “exhausted” by the division and rancor and found his abrasive style off-putting, few said they would be tempted to vote for a moderate Democrat simply as a way of calming the atmosphere – both because policy and action were more important (as in 2016), and because such a change was unlikely to come about anyway: *“If whoever comes in on the Democrat side can come up with plans that sound legitimate and possible, they have a chance of getting my vote. If not, I’ll put up with it;”* *“There is one Democratic candidate who says everything can be solved with love. It’s a nice thought but it’s not going to work;”* *“If the Democrats win it will be the same back and forth, it’s never going to end.”*

In our poll, Trump came out ahead in each match-up among white voters, by margins of between 10 points (over Harris) and just 2 points (over Biden).

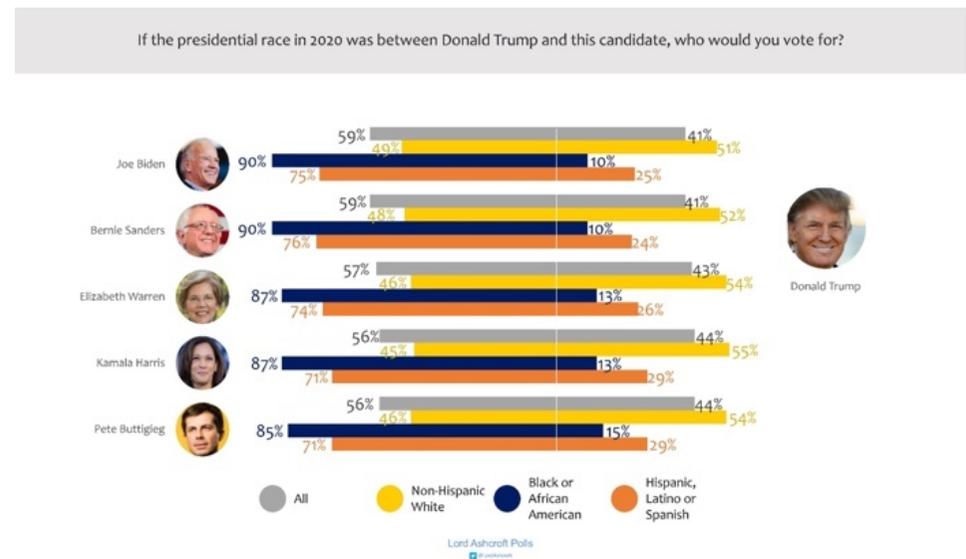
Among African Americans, Trump lost in each case by between 70 points (Buttigieg) and 80 points (Biden and Harris). Hispanic voters backed each Democratic challenger over Trump by between 42 points (Harris and Buttigieg) and 52 points (Sanders).

Although they had all voted for President Obama in 2012, none of the African American participants in our focus groups had voted in 2016, for reasons they explained: *“It was like a choice between drowning and fire;”* *“It was the lesser of two evils. I couldn’t get behind it;”* *“She decided that black people were going to vote Democratic, she didn’t have to pay attention, then it started slipping and suddenly she had hot sauce in her bag. Like when you go to church and there is a politician sitting outside. So I went deaf to her.”*

They were divided as to whether they would turn out in 2020. Some found Trump so appalling that the only imperative was to get him out:

“this time I will vote for anyone.” However, others were adamant that the Democratic nominee would have to earn their vote, not take it for granted as had been the case in the past.

They were also very pessimistic about the chances of Trump losing in 2020: *“His big joker is to use racism as a dog whistle. Poor white people will operate against their own interests to listen to that dog whistle. He’ll win because he’ll always go lower than any other candidate;”* *“There is a big ‘us against them’ sentiment. It’s ‘we’re riding with him, he’s our guy;”* *“He’s admitted to sexual assault, he’s said he could shoot someone in Times Square... how many things has he been able to pull off and still get elected? Those people could have changed their minds and they didn’t.”*



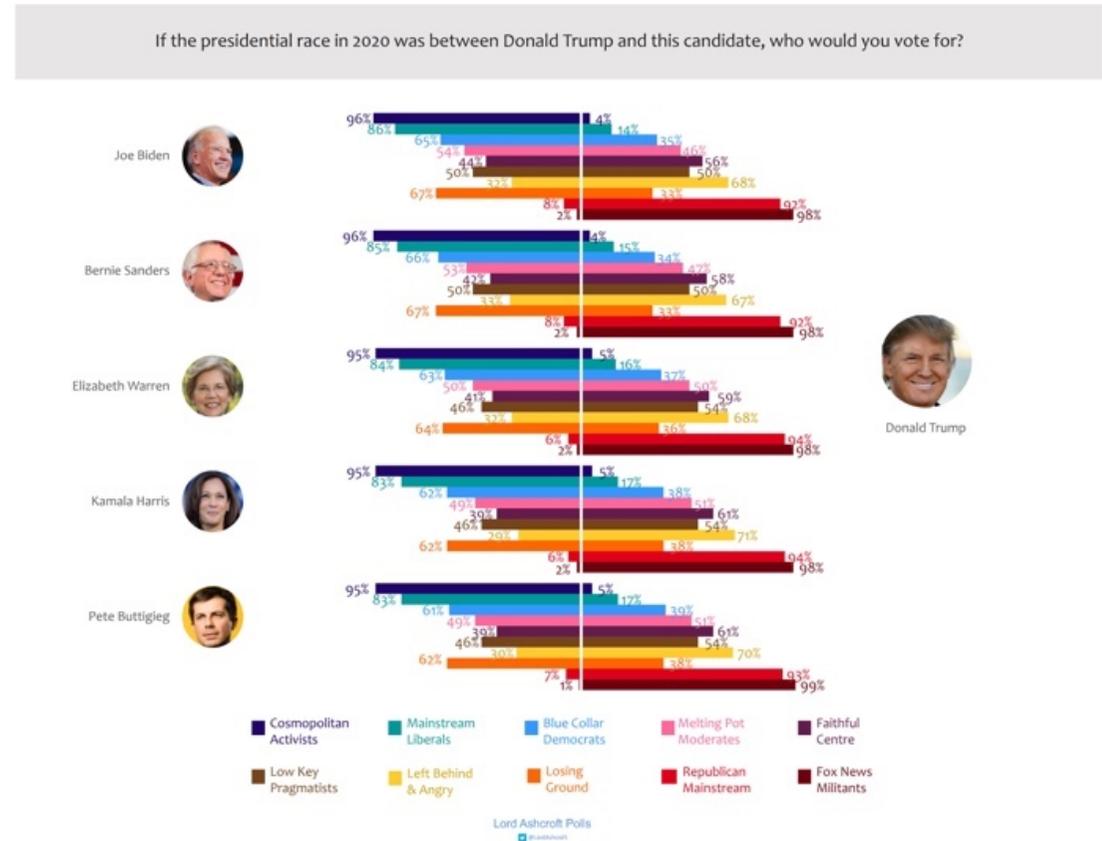
Trump's Final Countdown?

In each case, *Fox News Militants* backed Trump by at least 96 points, *Republican Mainstream* by at least 84 points, *Left Behind and Angry* by between 34 points (over Sanders) and 42 points (Harris), and the *Faithful Center* by between 12 points (over Biden) and 22 points (over Harris and Buttigieg).

Cosmopolitan Activists backed each challenger by a margin of around 90 points, *Mainstream Liberals* by at least 66 points, *Blue-Collar Democrats* by between 22 points (Buttigieg) and 32 points (Sanders), and the *Losing Ground* segment by between 24 points (Harris, Buttigieg) and 34 points (Biden, Sanders).

Among *Low Key Pragmatists*, Trump beat Warren, Harris and Buttigieg by 8 points, but ties with Biden and Sanders.

Among *Melting Pot Moderates*, Trump beats Harris and Buttigieg by 2 points, ties with Warren, but loses to Sanders by 6 points and Biden by 8 points.



ABOUT LORD ASHCROFT

Lord Ashcroft KCMG PC is an international businessman, author, philanthropist and pollster. From 2005 to 2010 he was Deputy Chairman of the Conservative Party, having been its treasurer from 1998 to 2001. He began conducting political research in the run-up to the 2005 UK general election; the findings formed the basis of his book *Smell the Coffee: A Wake-Up Call for the Conservative Party*. In 2010 he founded Lord Ashcroft Polls, which has established a reputation for insightful non-partisan research on politics and public opinion in the UK, Europe and the United States, looking in detail at elections, referendums, political leadership, party brands and the motivations and priorities of voters.

As well as *Smell the Coffee*, his political works include: *Minority Verdict: The Conservative Party*, *The Voters And the 2010 Election*; *Well, You Did*

Ask: Why the UK Voted to Leave the EU; *Call Me Dave: The Unauthorised Biography of David Cameron*; *Hopes and Fears: Trump, Clinton, the Voters and the Future*; and *The Lost Majority: The 2017 Election, the Conservative Party, the Voters & the Future*.

Lord Ashcroft is also founder and chairman of the board of the charity Crimestoppers, a Trustee of the Imperial War Museum, chairman of the trustees of Ashcroft Technology Academy, Chancellor of Anglia Ruskin University, and Treasurer of the International Democrat Union. From 2012 to 2018 he served as the Prime Minister's Special Representative on Veterans' Transition. His other books include: *Victoria Cross Heroes*; *Special Ops Heroes*; *Heroes of the Skies*; *George Cross Heroes*; *Special Forces Heroes*; and *White Flag? An Examination of the UK's Defence Capability*.

ABOUT ASHCROFT IN AMERICA

Lord Ashcroft's US research began in the autumn of 2016 with focus groups in seven swing states. The findings from these groups, together with analysis from a 30,000-sample poll, formed the basis of his book *Hopes & Fears: Trump, Clinton, The Voters And The Future*, which sought to explain how the country had arrived at its decision, as well as looking in detail at the US electorate and the prospects for the future of American politics. Since then, Lord Ashcroft has continued to conduct regular polls and focus groups which, together with his

interviews with prominent figures on the American scene, form the basis of his *Ashcroft In America* podcast, which is available on iTunes and other platforms. In the coming months *Ashcroft In America* will look in more detail at the 2020 presidential election campaign as it unfolds.

Lord Ashcroft's research and analysis is published at LordAshcroftPolls.com and his Facebook page, *Ashcroft in America*. You can also follow him on Twitter: [@LordAshcroft](https://twitter.com/LordAshcroft)

