

June 4, 2019



U.S. NATIONAL SURVEY

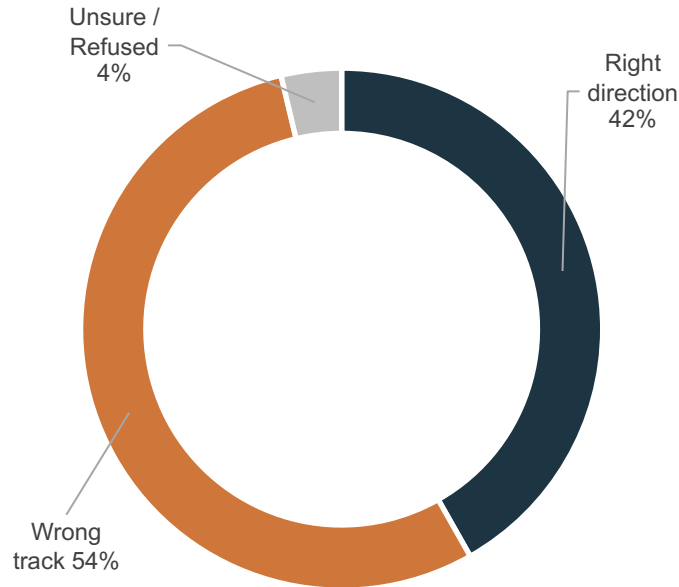
2020 General Election Voters

Methodology

This online survey was conducted May 22-23, 2019, with 1019 likely general election voters. Interviews were conducted using an online sample collection platform accessed via secure link. This survey was weighted to a likely 2020 general election voter universe.

US Right Track/Wrong Direction

Generally speaking, would you say things in the United States of America are headed in the right direction or off on the wrong track?

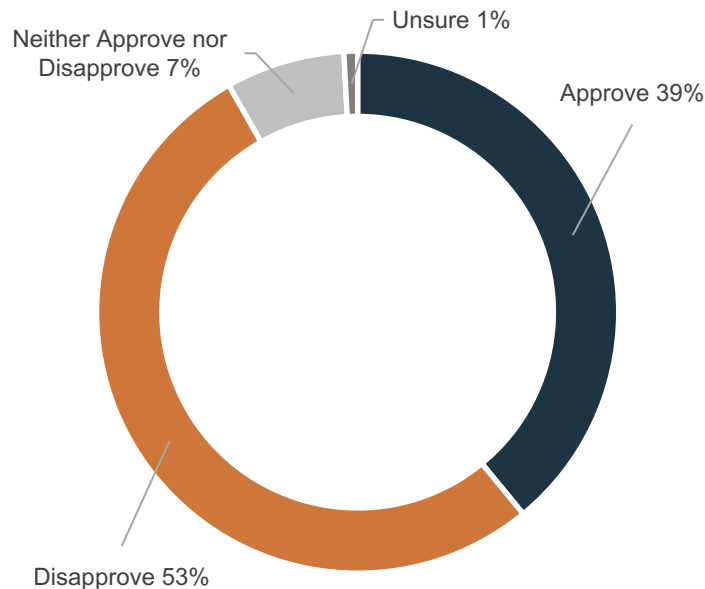


	Right direction	Wrong track
Female	34%	61%
Male	50%	47%
Under 45	36%	60%
45 and Over	46%	51%
Left Mainstream	17%	80%
Left Populist	14%	84%
Center Mainstream	37%	57%
Center Populist	41%	54%
Right Mainstream	62%	35%
Right Populist	70%	28%
Unaligned	29%	61%
Republican	75%	22%
Independent	41%	53%
Democrat	13%	84%
Trump - Fav	81%	16%
Trump - Unfav	13%	85%



Trump's Job Approval

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

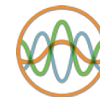
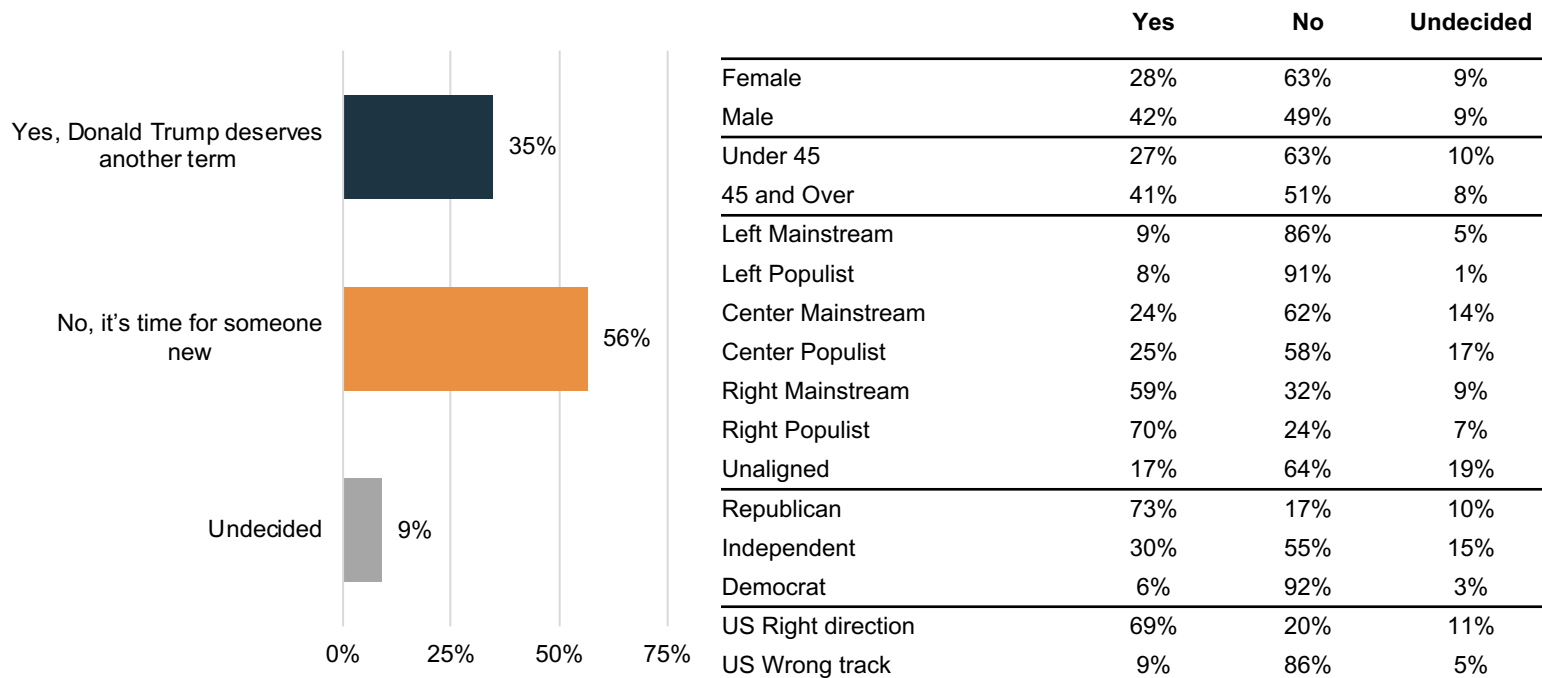


	Approve	Disapprove
Female	33%	59%
Male	46%	46%
Under 45	32%	58%
45 and Over	45%	49%
Left Mainstream	14%	81%
Left Populist	10%	88%
Center Mainstream	25%	60%
Center Populist	38%	54%
Right Mainstream	64%	26%
Right Populist	72%	25%
Unaligned	26%	53%
Republican	78%	15%
Independent	35%	51%
Democrat	8%	87%
US Right direction	75%	14%
US Wrong track	12%	84%



Trump Reelect

Does Donald Trump deserve reelection, or is it time for someone new?



2020 Presidential Ballot

If the 2020 election for President was held today, and you had to make a choice, would you vote for Donald Trump, the Democratic candidate, or someone else?

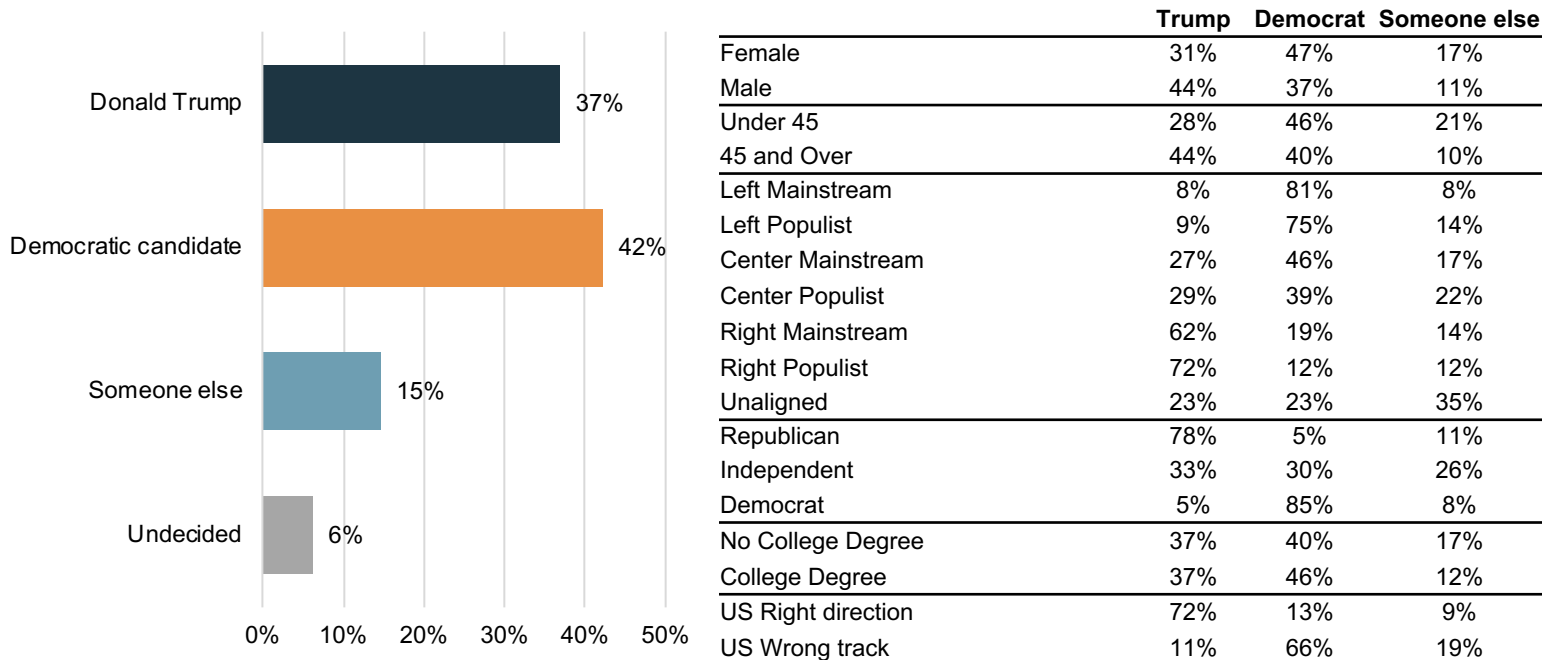
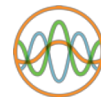
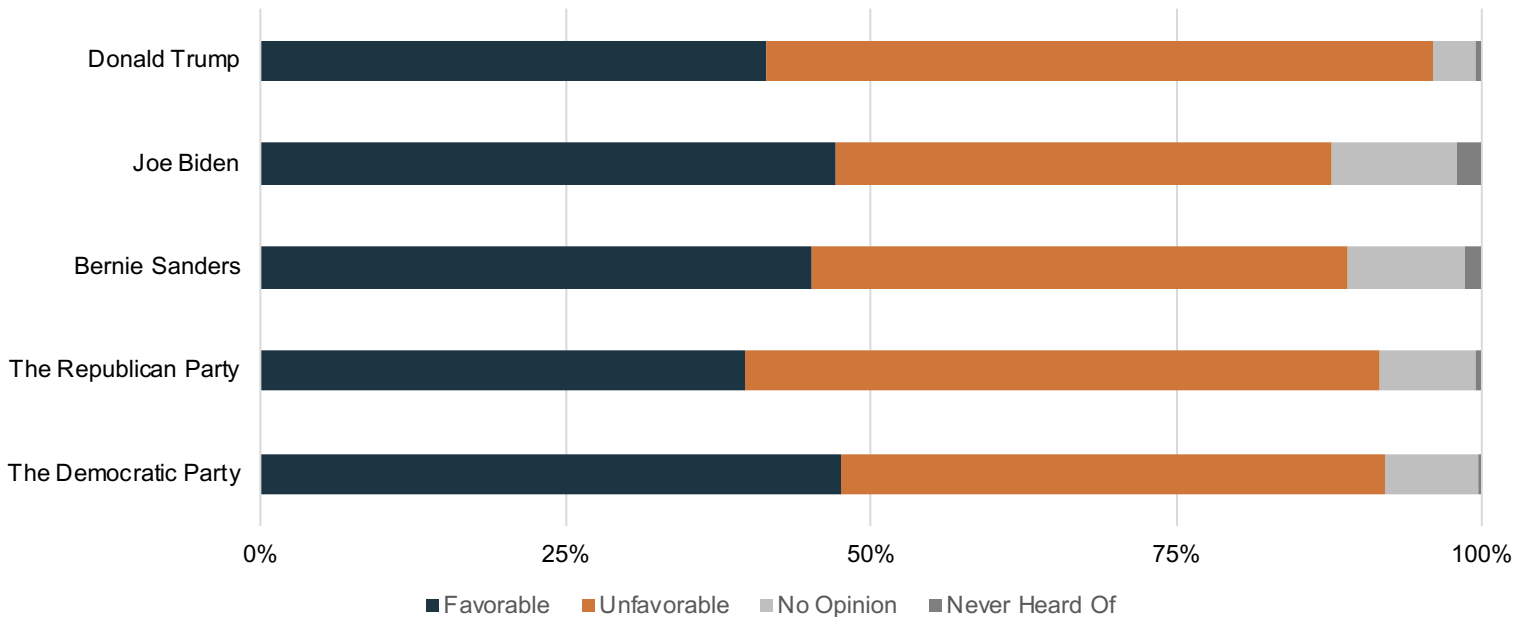


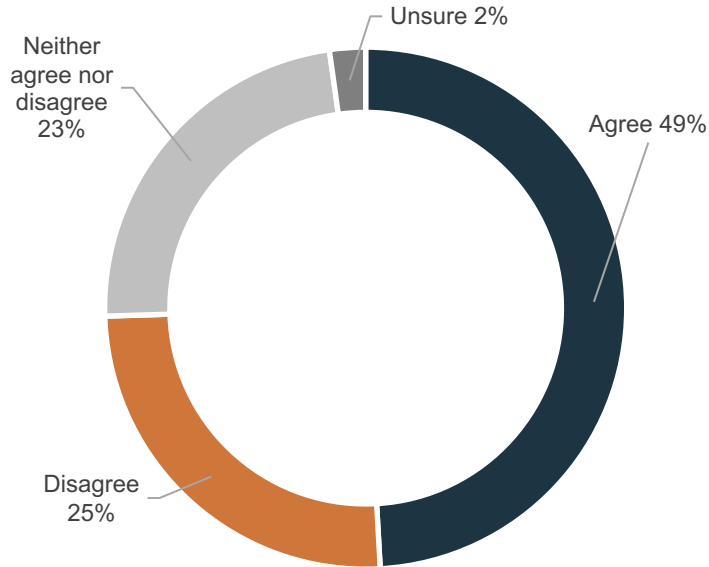
Image Tests

Please indicate if you have heard of the individual or group, and if you have, whether you have a favorable or unfavorable impression of the individual or group. If you don't recognize a name, choose so.



Message Tests

Ordinary people would do a better job solving the country's problems than elected officials.

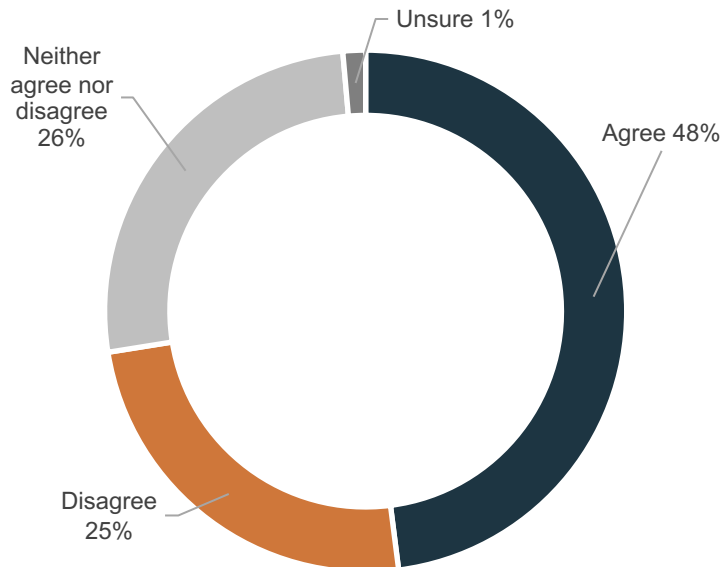


	Agree	Disagree	Neither
Female	48%	24%	25%
Male	50%	27%	21%
Under 45	48%	26%	23%
45 and Over	50%	25%	23%
Left Mainstream	20%	44%	34%
Left Populist	100%	0%	0%
Center Mainstream	14%	41%	42%
Center Populist	100%	0%	0%
Right Mainstream	17%	42%	38%
Right Populist	100%	0%	0%
Unaligned	41%	18%	23%
Republican	54%	25%	21%
Independent	50%	23%	23%
Democrat	44%	28%	26%
US Right direction	53%	24%	21%
US Wrong track	47%	27%	24%



Message Tests

Most ordinary people are generally honest and can be trusted.

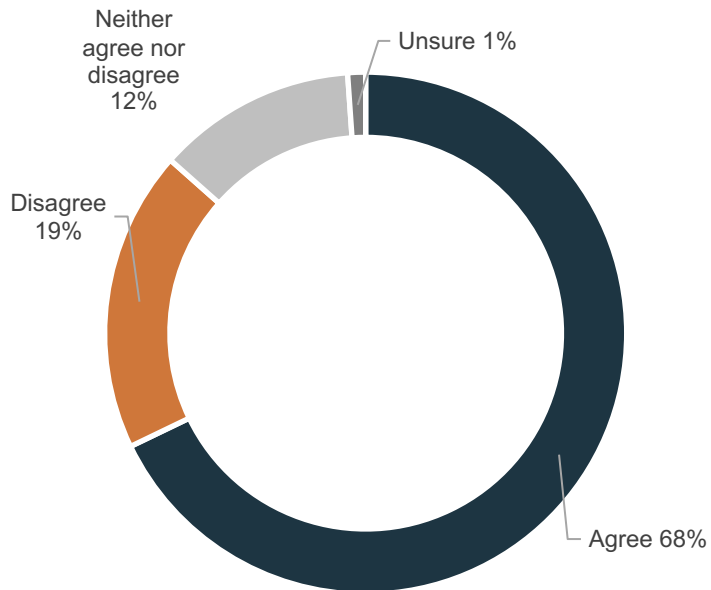


	Agree	Disagree	Neither
Female	46%	25%	27%
Male	51%	23%	25%
Under 45	42%	30%	25%
45 and Over	52%	20%	27%
Left Mainstream	44%	23%	32%
Left Populist	57%	22%	21%
Center Mainstream	42%	24%	33%
Center Populist	59%	25%	17%
Right Mainstream	39%	34%	25%
Right Populist	65%	15%	20%
Unaligned	22%	29%	34%
Republican	50%	25%	24%
Independent	48%	26%	24%
Democrat	46%	23%	30%
No College Degree	45%	25%	28%
College Degree	51%	24%	24%



Message Tests

Most elected officials don't care what people like me think.

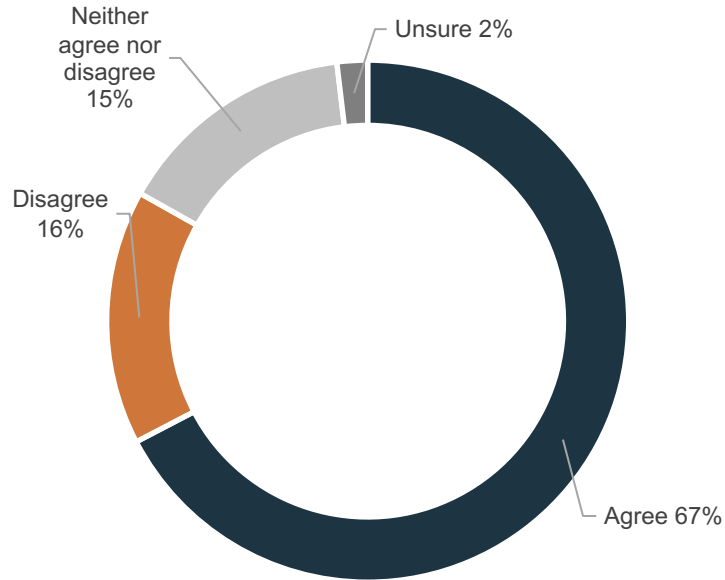


	Agree	Disagree	Neither
Female	65%	21%	12%
Male	71%	16%	13%
Under 45	67%	17%	14%
45 and Over	69%	20%	11%
Left Mainstream	46%	36%	17%
Left Populist	100%	0%	0%
Center Mainstream	53%	24%	22%
Center Populist	100%	0%	0%
Right Mainstream	45%	33%	21%
Right Populist	100%	0%	0%
Unaligned	62%	11%	15%
Republican	67%	20%	12%
Independent	70%	14%	14%
Democrat	66%	21%	12%
No College Degree	70%	15%	14%
College Degree	65%	23%	11%
US Right direction	66%	18%	14%
US Wrong track	70%	19%	11%



Message Tests

Ordinary citizens have been betrayed, neglected, or exploited by the elites of this country.

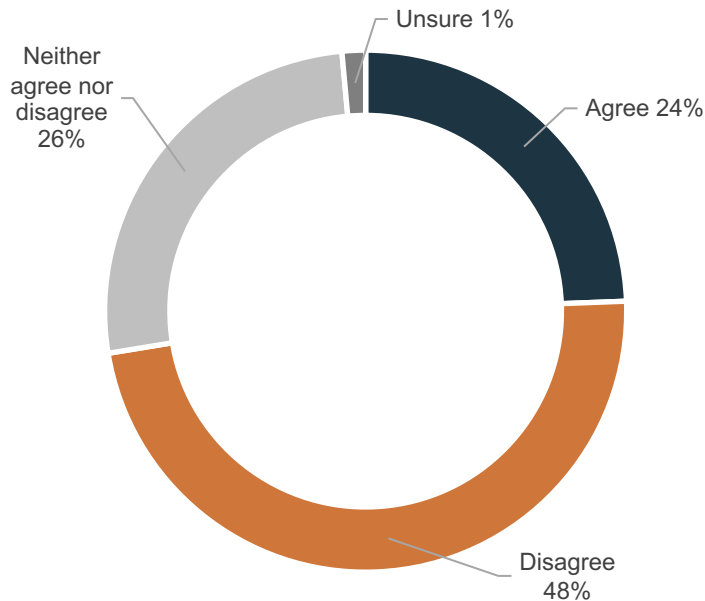


	Agree	Disagree	Neither
Female	66%	14%	18%
Male	69%	18%	11%
Under 45	61%	18%	18%
45 and Over	72%	14%	13%
Left Mainstream	67%	18%	13%
Left Populist	84%	10%	6%
Center Mainstream	56%	18%	23%
Center Populist	73%	10%	16%
Right Mainstream	58%	22%	19%
Right Populist	82%	10%	7%
Unaligned	49%	13%	23%
Republican	64%	20%	15%
Independent	65%	15%	17%
Democrat	72%	13%	13%
No College Degree	65%	14%	18%
College Degree	70%	18%	12%
US Right direction	62%	20%	17%
US Wrong track	73%	13%	13%



Message Tests

Ordinary people can't be trusted to make the right choices about our nation's interests.

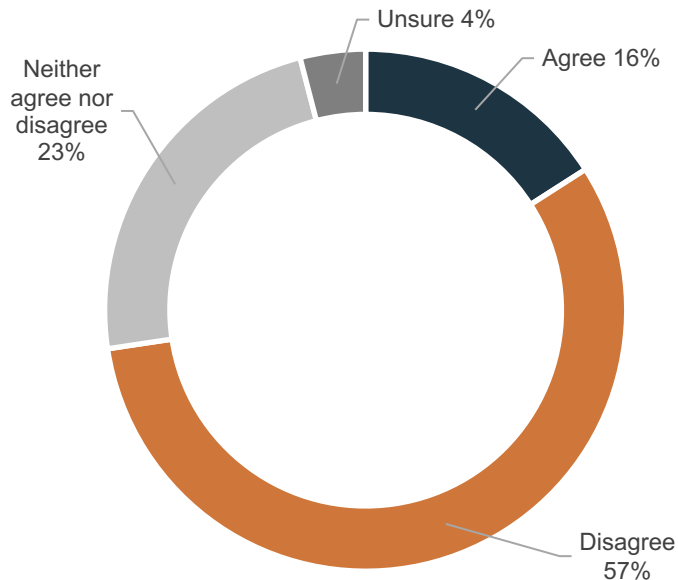


	Agree	Disagree	Neither
Female	23%	47%	28%
Male	26%	49%	24%
Under 45	28%	41%	28%
45 and Over	22%	53%	25%
Left Mainstream	25%	49%	26%
Left Populist	25%	57%	18%
Center Mainstream	21%	40%	37%
Center Populist	19%	57%	24%
Right Mainstream	35%	36%	27%
Right Populist	19%	63%	18%
Unaligned	13%	38%	34%
Republican	27%	49%	24%
Independent	22%	48%	28%
Democrat	24%	48%	27%
No College Degree	25%	44%	29%
College Degree	23%	53%	23%



Message Tests

States should transfer more powers to the federal government.

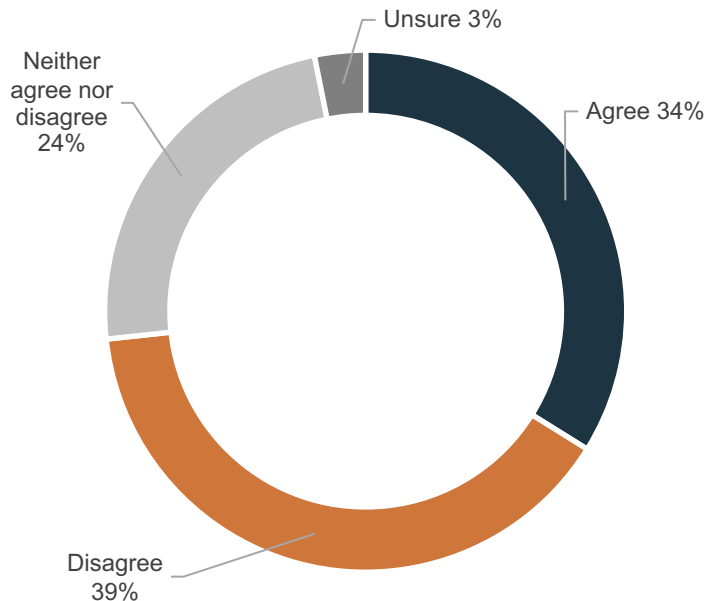


	Agree	Disagree	Neither
Female	16%	51%	27%
Male	16%	63%	20%
Under 45	21%	46%	27%
45 and Over	12%	65%	20%
Left Mainstream	19%	49%	28%
Left Populist	15%	57%	25%
Center Mainstream	16%	49%	30%
Center Populist	9%	70%	20%
Right Mainstream	18%	60%	18%
Right Populist	15%	67%	16%
Unaligned	10%	33%	37%
Republican	15%	66%	16%
Independent	14%	58%	23%
Democrat	18%	47%	30%
No College Degree	17%	50%	27%
College Degree	14%	65%	19%



Message Tests

It is generally good for our society if the government regulates business.

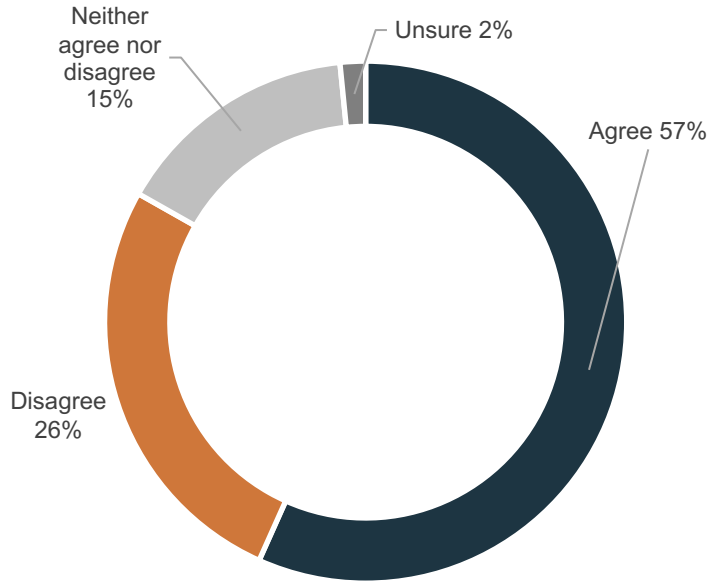


	Agree	Disagree	Neither
Female	32%	38%	26%
Male	36%	42%	21%
Under 45	35%	33%	27%
45 and Over	33%	44%	21%
Left Mainstream	52%	25%	21%
Left Populist	51%	29%	19%
Center Mainstream	33%	34%	29%
Center Populist	30%	47%	21%
Right Mainstream	24%	49%	24%
Right Populist	26%	55%	19%
Unaligned	12%	26%	43%
Republican	23%	55%	20%
Independent	31%	39%	26%
Democrat	46%	26%	25%
US Right direction	26%	51%	21%
US Wrong track	41%	31%	25%



Message Tests

It is the government's responsibility to ensure a decent standard of living for all citizens.

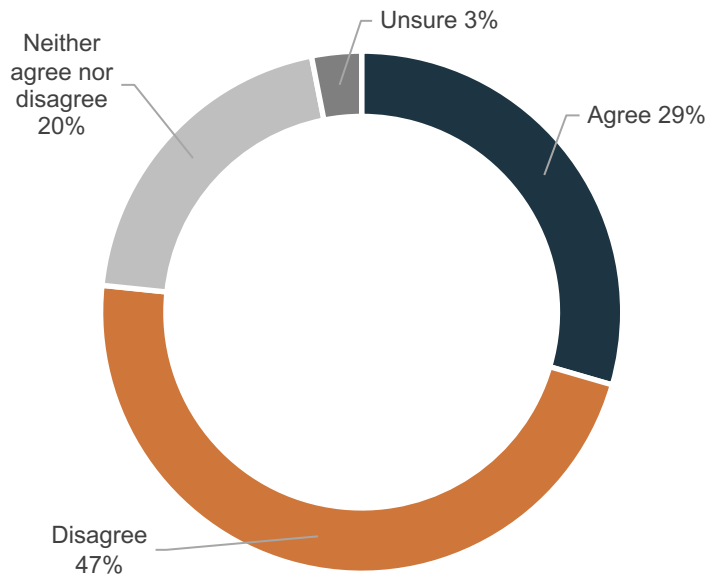


	Agree	Disagree	Neither
Female	61%	22%	15%
Male	52%	31%	15%
Under 45	61%	19%	17%
45 and Over	53%	32%	14%
Left Mainstream	76%	10%	14%
Left Populist	75%	13%	10%
Center Mainstream	54%	29%	17%
Center Populist	68%	22%	9%
Right Mainstream	42%	38%	19%
Right Populist	42%	44%	13%
Unaligned	46%	8%	32%
Republican	43%	41%	16%
Independent	51%	28%	18%
Democrat	73%	13%	12%
No College Degree	58%	23%	16%
College Degree	55%	30%	14%



Message Tests

All further legal and illegal immigration to the United States should be halted.

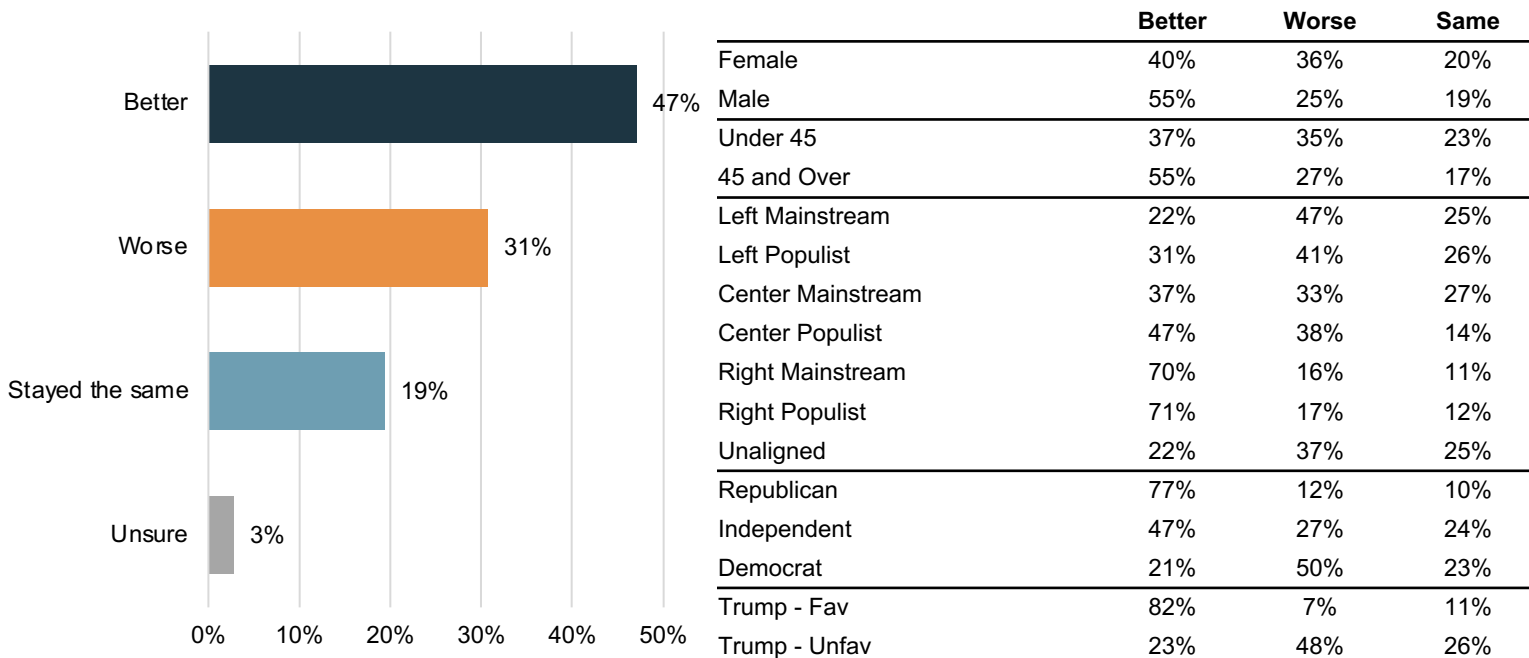


	Agree	Disagree	Neither
Female	26%	47%	22%
Male	33%	47%	18%
Under 45	27%	44%	23%
45 and Over	32%	49%	18%
Left Mainstream	14%	66%	16%
Left Populist	19%	64%	16%
Center Mainstream	29%	41%	28%
Center Populist	33%	48%	18%
Right Mainstream	36%	37%	24%
Right Populist	46%	39%	15%
Unaligned	23%	30%	26%
Republican	49%	32%	19%
Independent	25%	48%	23%
Democrat	17%	60%	20%
US Right direction	43%	33%	22%
US Wrong track	20%	58%	18%
Trump - Fav	47%	32%	20%
Trump - Unfav	17%	61%	19%



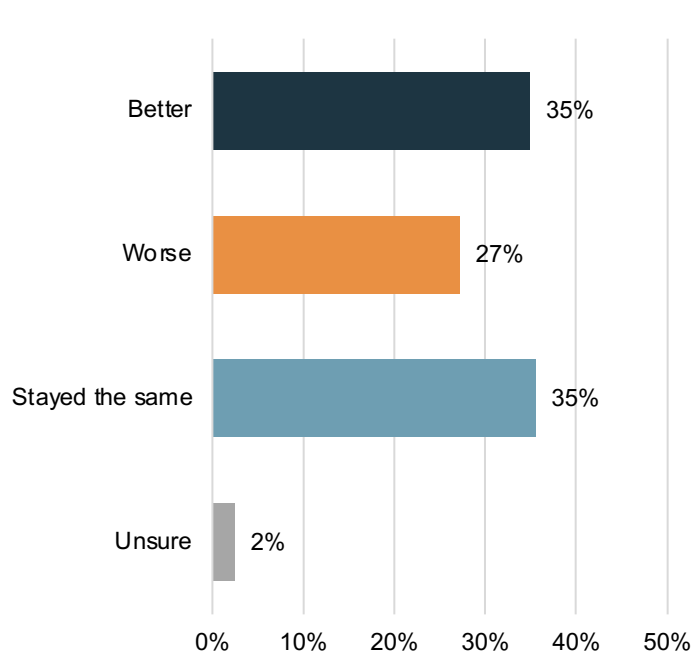
General Economic Improvement

How do you think the general economic situation in this country has changed over the last 12 months? Has it...

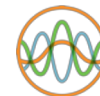


Household Financial Improvement

How has the financial situation of your household changed over the last 12 months? Has it...

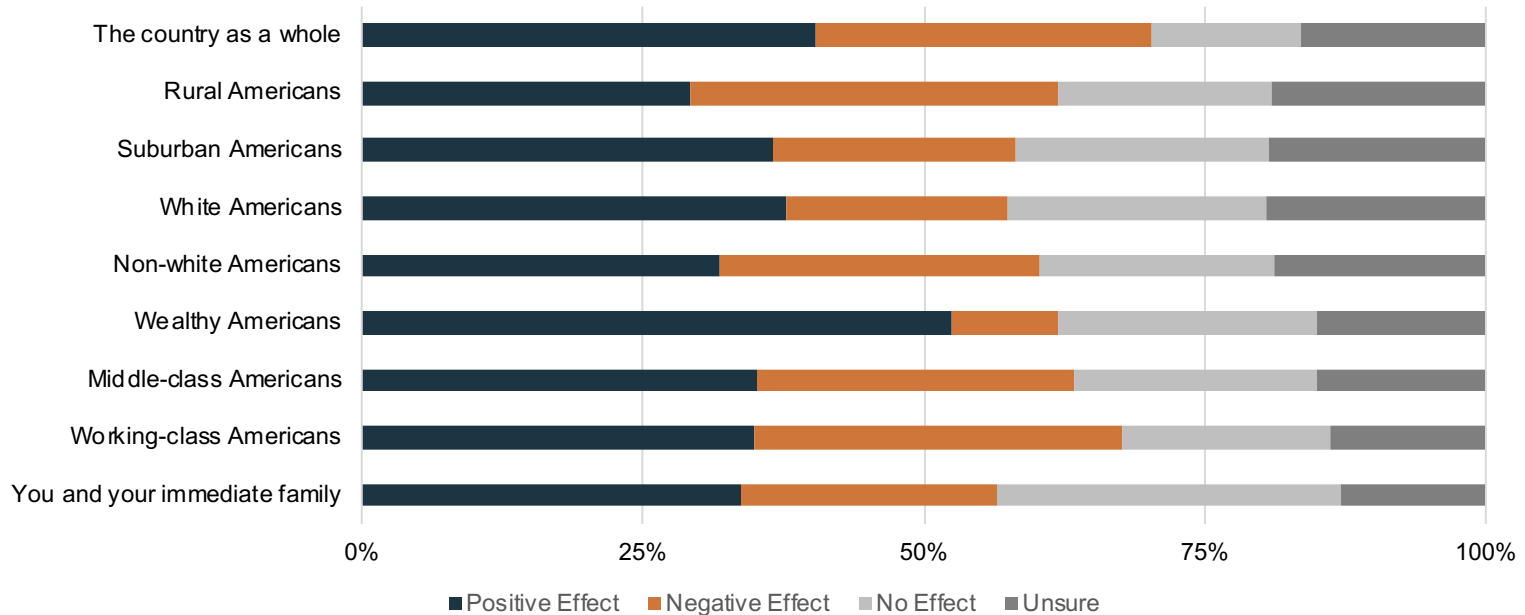


	Better	Worse	Same
Female	29%	33%	34%
Male	42%	20%	37%
Under 45	35%	30%	31%
45 and Over	35%	25%	39%
Left Mainstream	21%	38%	38%
Left Populist	22%	39%	38%
Center Mainstream	31%	28%	39%
Center Populist	31%	34%	34%
Right Mainstream	51%	16%	31%
Right Populist	49%	16%	36%
Unaligned	20%	34%	31%
Republican	52%	15%	32%
Independent	35%	27%	34%
Democrat	19%	38%	39%
Trump - Fav	56%	13%	31%
Trump - Unfav	20%	38%	40%



Economic Globalization

Do you think economic globalization – the increased trade between countries in goods, services, and investments – has had a negative effect, no effect, or a positive effect on each of the following groups:



Insights

- 2% think the US is headed in the right direction while 54% said wrong track. Nearly 30% of respondents said definitely wrong track.
- The partisan split over the direction of the country is extremely clear. 75% of self-identified Republicans said right direction while 84% of Democrats said wrong track.
- Over 50% of male respondents said right direction, as opposed to just 34% of females.
- 39% of respondents approve of the way Donald Trump is handling his job as President, while 53% disapprove.
- Nearly 80% of Republicans approve of the job Donald Trump is doing as President.
- 70% of right-populists think Donald Trump deserves another term. That number is 10 points lower among the right-mainstream grouping. 91% of left-populists believe it's time for someone new.



Insights

- Respondents' desire for a second Trump term is closely tied to their opinions of the economy. 62% of respondents who feel the economy has improved over the past 12 months think Trump deserves another term. 89% Those who believe it's gotten a lot better believe trump deserves a second term. Only 7% of those who believe the economy is worse believe Trump deserves another term.
- There's a 14-point gap between Men (42%) and Women (28%) who believe DJT deserves a second term.
- While 56% said that Donald Trump doesn't deserve reelection, only 42% said they planned to vote for the democratic candidate. With an enormous Democratic field for the nomination, and a clear divide in the party between hyper-liberal democrats and more moderate liberals, it isn't a foregone conclusion that the entire party will rally around the nominee, something that spelled disaster for Hillary in 2016.



Insights

- Trumps favorability is net -13 overall, but is +51 among right-populists. For contrast, it's +36 among right-leaning respondents who hold more mainstream ideologies.
- Biden (+7), Sanders (+1), and the Democratic Party (+3) all have positive net favorabilities overall.
- Bernie has +52 net favorability with left leaning populists.
- Populists are often characterized by their distrust of traditional institutions, including the political parties that mirror their political views. 29% of right-populists have an unfavorable opinion of the Republican party, 3-points higher than the right-mainstream grouping. The left-populist and left-mainstream groupings are more aligned behind the Democratic party, but there is a disparity in intensity (LP – 36% very favorable | LM – 40% very favorable).



Insights

- The defining characteristic of populists, regardless of their political view, is that the systems put in place by the elites are rigged against them. They share a deep distrust of traditional institutions. This can be seen in the fav/unfavs of the Democratic and Republican parties.
- They believe the common man is generally honest, regardless of party affiliation. 60% of populists agree with this statement, while only 41% of those who hold more mainstream views agree.
- A large majority of the country (68%) believes that elected officials don't care what people like them think.
- There was a negligible difference across ideological lines among conservatives, liberals and moderates.



Insights

- The anti-establishment sentiments helping to fuel the populist wave can be found on the left, center and right of the ideological spectrum. This is incredibly evident when looking at the responses to the statement on page 14 and the one on page 15. Populists (80%) overwhelmingly feel that ordinary citizens have been betrayed by the elites of this country, regardless of their political view. Only 60% of those with mainstream ideologies hold this view with a much smaller percentage saying they strongly agree (24%).
- While state's rights have long been a tenant of the Republican party, a majority of the country believes that more power should NOT be transferred to the federal government. Intensity is particularly high among populists on both sides of the aisles, even left leaning populists. This further gets to the root of populist movements, a distrust of the perceived powers granted to the ruling class, including the federal government.



Insights

- Populism is about the perceived imbalance of ordinary citizens and the elites of the country. You'll see throughout the different messages that we tested left, center, and right populists are in general agreement on statements dealing with imbalances of power, but line back up across party lines when dealing with more typical policy statements.
- Even though the margins are not as large, left, right, and center populists all disagreed with the statement on page 17 at a slightly higher rate than their mainstream counterparts; however, the divide across party is much clearer.
- While populist views play a significant role in some key areas, the attitudinal differences between people who place themselves on the left and those who place themselves on the right tend to be larger across specific public policy issues. You'll see that the left-right divide is particularly large on the issue of immigration, but is also significant when looking at the role the government plays in the economy.



Insights

- Respondents categorized as left-mainstream are at least 34 percentage points more likely than those in the right-mainstream to say it is the government's responsibility. While center-populist groups are more supportive of government assistance than those in the mainstream, the divide by populist views overall tends to be smaller than the ideological divide in America.
- There's also a pretty clear link between the anti-establishment sentiments and attitudes of populism and immigration. Overall, party is still the clearest divide in attitudes about immigrants, however respondents with populist views are consistently more negative toward immigrants than those in the mainstream who share their ideological position, regardless of party.



Insights

- There is a lot of debate over whether or not economic issues are the underlying cause of the rise of populist movements. Some studies in Europe have shown a correlation between the two, but in America, respondents opinions about the national economy are much more closely tied to their party affiliation. Left-right differences carry more weight than populist sympathies when it comes to how people view the government's involvement in the economy.
- This trend is present at the micro-level as well. 52% of Republicans say their personal financial situation has improved in the last year, as opposed to only 19% of Democrats. There's almost no perceptible difference between those with mainstream and populist ideologies.



Insights

- 41% of respondents feel the country as a whole has benefitted from economic globalization, but when you drill down to different sub-groups of the population, a majority of Americans believe that only wealthy Americans have benefitted from globalization. There was almost no variation between those who were categorized as populists and those who were categorized as mainstream when looking at crosstabs of each group tested with exception of wealthy Americans.
- This is further proof that populism in America seems to be much more closely tied to the rhetorical idea of an imbalance between elites and ordinary people than specific economic conditions or policy positions, which mostly break along party lines.



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June 4, 2019



U.S. NATIONAL SURVEY

2020 General Election Voters