



ELECTION
2020

REALITY CHECK: ELECTION 2020

THE TRUE STORY OF BIDEN V. TRUMP



What if
MEDIA GROUP



The Problem With Polling

With national political polls in recent weeks showing a strong advantage for Joe Biden in the Presidential race, it may seem that the contest is pretty much set at this point. However, the experience of 2016 taught us the limitations of polling as a science, and demonstrated that knowing the minds of the electorate is no easy task.

During the polling post mortem that followed the 2016 vote, several key threads emerged that underlined how pollsters' biases may have affected their prediction. One 2017 NY Times retrospective identified three broad categories of bias that likely impacted the reliability of the pre-electoral polling:

“**Undecided voters broke** for Mr. Trump in the final days of the race, or in the voting booth. **Turnout** among Mr. Trump’s supporters was somewhat higher than expected. And state polls, in particular, understated Mr. Trump’s support in the decisive Rust Belt region, in part because those **surveys did not adjust for the educational composition of the electorate** — a key to the 2016 race.”

The Problem with Polling

Each of these factors—indecision, enthusiasm, and educational attainment—were discounted by pollsters during their weighting. And, in some cases, they overlapped: for example, some analysts discounted voting intentions (enthusiasm) from people without a college degree because of a long-held belief that these

voters would not turn out on election day. Another key issue that can skew polling is reluctance to engage or be truthful with pollsters. Many voters instinctively shy away from discussing their beliefs with strangers, making it difficult to capture truly representative data, *particularly when the polling is the sole focus of a survey.*

“ Many voters instinctively shy away from discussing their beliefs with strangers, making it difficult to capture truly representative data”

Meeting Voters Where They Are

One solution to these issues is to meet voters where they are: not asking a series of questions solely dedicated to campaign issues, but rather inserting campaign-related questions into a wider survey covering a range of topics, from the impact of current news events, to product marketing-related issues.

What If Media Group, an award-winning

performance marketing company, takes exactly that approach to its political polling, with results that suggest that, just like in 2016, the 2020 Presidential race is significantly closer than national political polling might suggest—and that it may once again be decided by unforeseen enthusiasm for candidates, and the late choices of undecided voters.

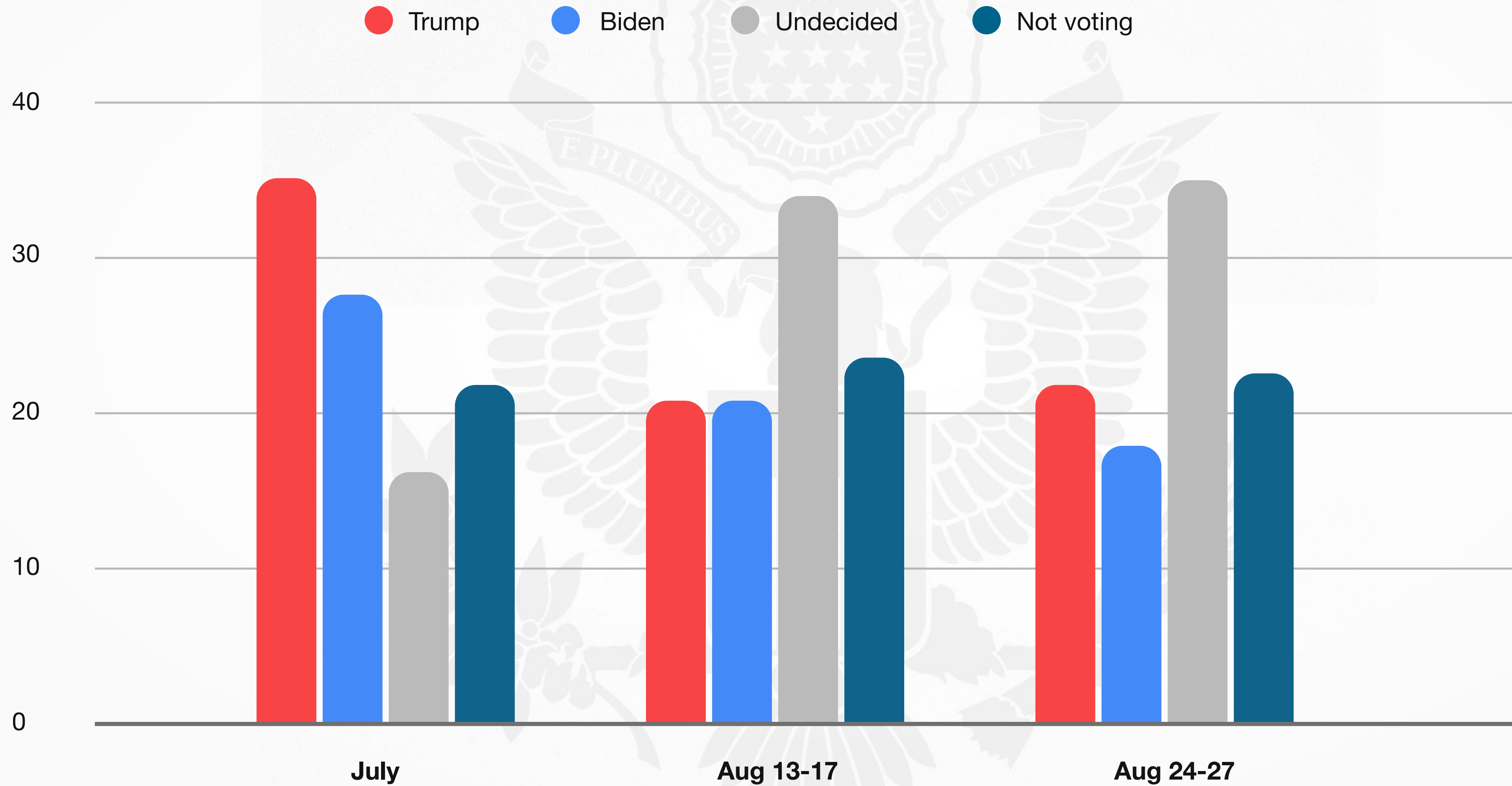
Presidential Preferences

In a series of three polls conducted in July and August 2020, What If Media Group's polling found a highly competitive race, with President Trump leading among voters for the majority of the summer. The first poll, conducted in July, surveyed 13,912 voters, and found President Trump leading former Vice President Biden by almost 6 points—33.9% to 28.1%—at a time when some national political polls indicated that the Biden campaign was leading by as much as 10%. The second poll, conducted after the announcement of Kamala Harris as Biden's

running mate, and during the Democratic National Convention, indicated that the candidates were running statistically neck-and-neck, with each drawing support from approximately 21% of the public, significantly lower than the 33% of undecided respondents.

In the third poll, meanwhile, conducted during the Republican National Convention, the Trump campaign's lead had been restored to 4 points, with the incumbent leading Biden by 22% to 18%, with undecided voters making up 34% of the sample.

Who do you plan to vote for in the upcoming election?



The Enthusiasm Issue

While the Trump campaign may be looking to polling such as the above as evidence that 2016 may be repeating itself, it is also facing headwinds when it comes to one of the other metrics that defined that election: enthusiasm.

In What If Media Group's polling, respondents are asked to rate their enthusiasm at voting for the candidate of their choice on a scale of 1 to 10 (with 10 being the most enthusiastic).

In What If's most recent poll, 65% of respondents selected responses ranging from 6 to 10 for President Trump—the same percentage as in the previous August poll. However, that represents a marked decline from the enthusiasm that the Trump campaign was generating as recently as July, when more than 72% of respondents selected a response in the 6 to 10 range.

The Enthusiasm Issue

The numbers get worse when considering only the most enthusiastic responses: in July, 54.5% of likely Trump votes selected 10 out of 10 for their level of enthusiasm for their candidate. In the two subsequent polls, those numbers have fallen to 49% and 47% respectively, suggesting that the increasingly fractious campaign is taking a toll.

The Biden camp is facing a similar decline in enthusiasm, although originating from a weaker overall position:

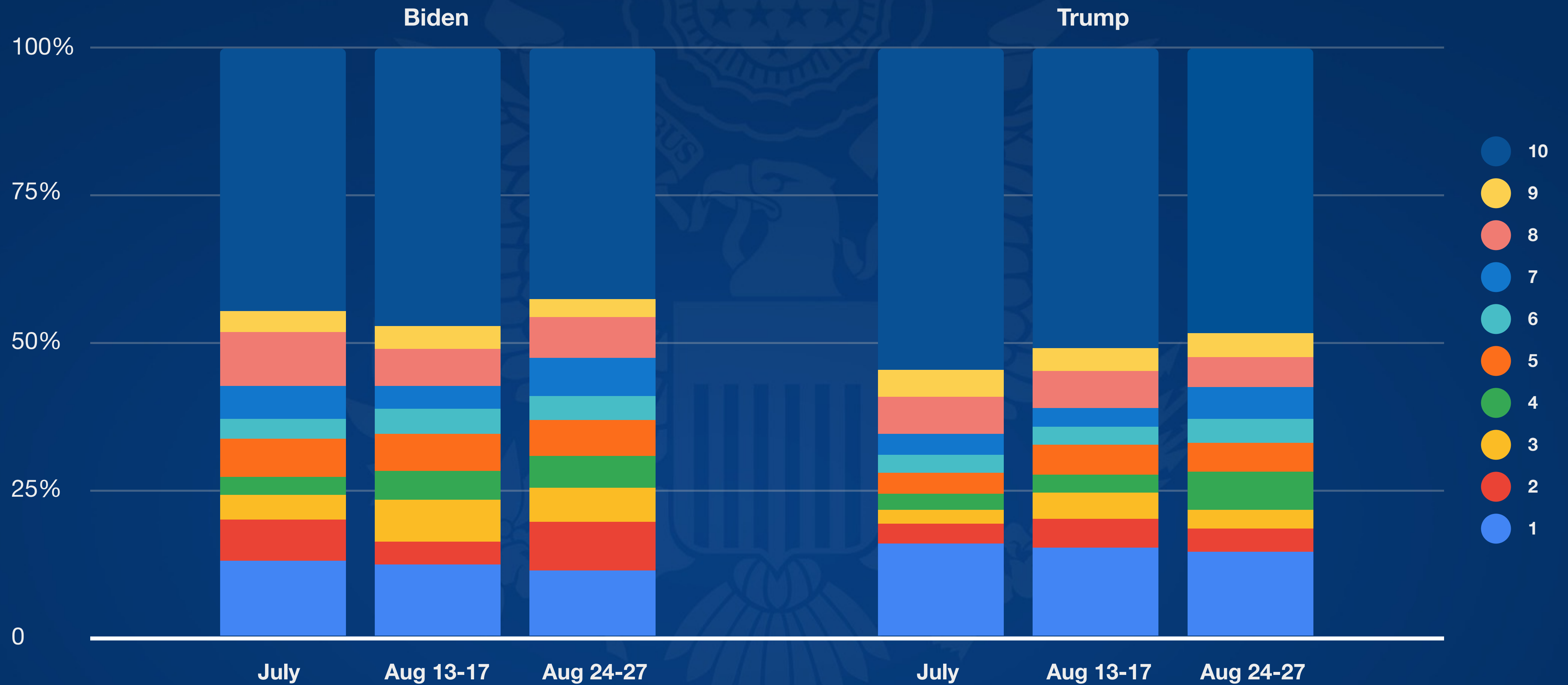
What If's July poll saw just 66.3% of pro-Biden respondents select a 6-10 level of enthusiasm about voting for their

candidate—a number that fell to 64% in the next poll, despite the Kamala Harris announcement and the onset of the DNC. And, by the time the RNC convention, enthusiasm amongst likely Biden voters had fallen even further, to 61%.

There is some evidence, however, that the selection of Harris and the DNC engendered some enthusiasm for Biden: the proportion of likely Biden voters who selected a 10 on the enthusiasm scale grew from 43.8% in July to 46% in the mid-August poll, only to fall to 41% by the end of the month.

Voter Enthusiasm for Candidates

Interestingly, supporters seem less ardently in favor of their preferred candidates as the election draws closer.



The Enthusiasm Issue

In terms of demographics, meanwhile, both Biden and Trump draw some of their most enthusiastic support from the same generation: Baby Boomers. In the most recent What If Media Group poll:

- 51% of Biden-voting Boomers selected 10 out of 10 for enthusiasm, with 54% of Trump's Boomer voters doing the same.
- 56% of Silent Generation Trump supporters selected 10 out of 10, compared to 44% for Biden —the largest generational enthusiasm gap in favor of Trump.
- Biden's biggest enthusiasm gap win was with Gen Z voters: 42% indicated maximum enthusiasm for Biden, compared to 29% for Trump.

Issues and Policy

When it comes to the issues actually driving voters to the polls, two areas dominate above all else:

Concerns related to COVID-19, and the economy. Combined, these account for the main issues for fully 43% of sampled voters.

However, as with enthusiasm, there is a significant knowledge gap about what truly motivates a large swath of the voting public: almost a quarter of people polled in What If Media Group's most recent survey selected "other" as their primary motivation for casting a ballot this fall, despite a long list of hot-button items to choose from.

Key Issues for Voters

WHICH OF THESE ISSUES IS YOUR PRIMARY MOTIVATION FOR CASTING A BALLOT?	PERCENTAGE OF VOTERS
Other	24
Health Concerns with COVID-19	15
Economy and Jobs	14
Economic Concerns with COVID-19	14
Social Security	5
Racial Justice	5
Health Care	4
Medicaid and Medicare	3
Gun violence and prevention	2
Criminal justice reform	2
Education	2
Labor unions and workers' rights	2
Immigration	2
Women's rights	2
Foreign policy and national security	2
Veterans	1
Voting rights	1
Campaign finance reform	1

*Issues listed in the survey for selection were worded verbatim in correspondence with an email sent by the Biden campaign to list subscribers in August 2020.

Key Issues for Voters

Given this range of issues one might expect the candidates' positions and policies on specific issues to be a key driver of likely votes. However, in What If Media Group's most recent poll, voters were asked to rate their familiarity with each candidate's

policies on a 10-point scale, with 10 being the most familiar. The result: 75% selected a value between 1 and 5 for Biden, and 72% for Trump, calling into question whether policy agendas are that much of a factor in swaying the electorate.

The Ground Game

According to a Washington Post analysis of 2016 election spending, the Presidential contest, including primaries, cost a combined \$2.1 billion. Of that, the Clinton campaign spent \$768 million to the successful Trump campaign's \$398 million outlay—proof positive that where campaigns spend matters just as much as how much they spend.

That's a lesson the Biden team will be seeking to take to heart, this time around: according to an NPR report, as of the end of July, the Trump campaign had raised some \$1.2 billion, with more than \$120 million on hand. By contrast, Biden had raised \$699 million, and had \$98 million on hand to spend for the remainder of the campaign.

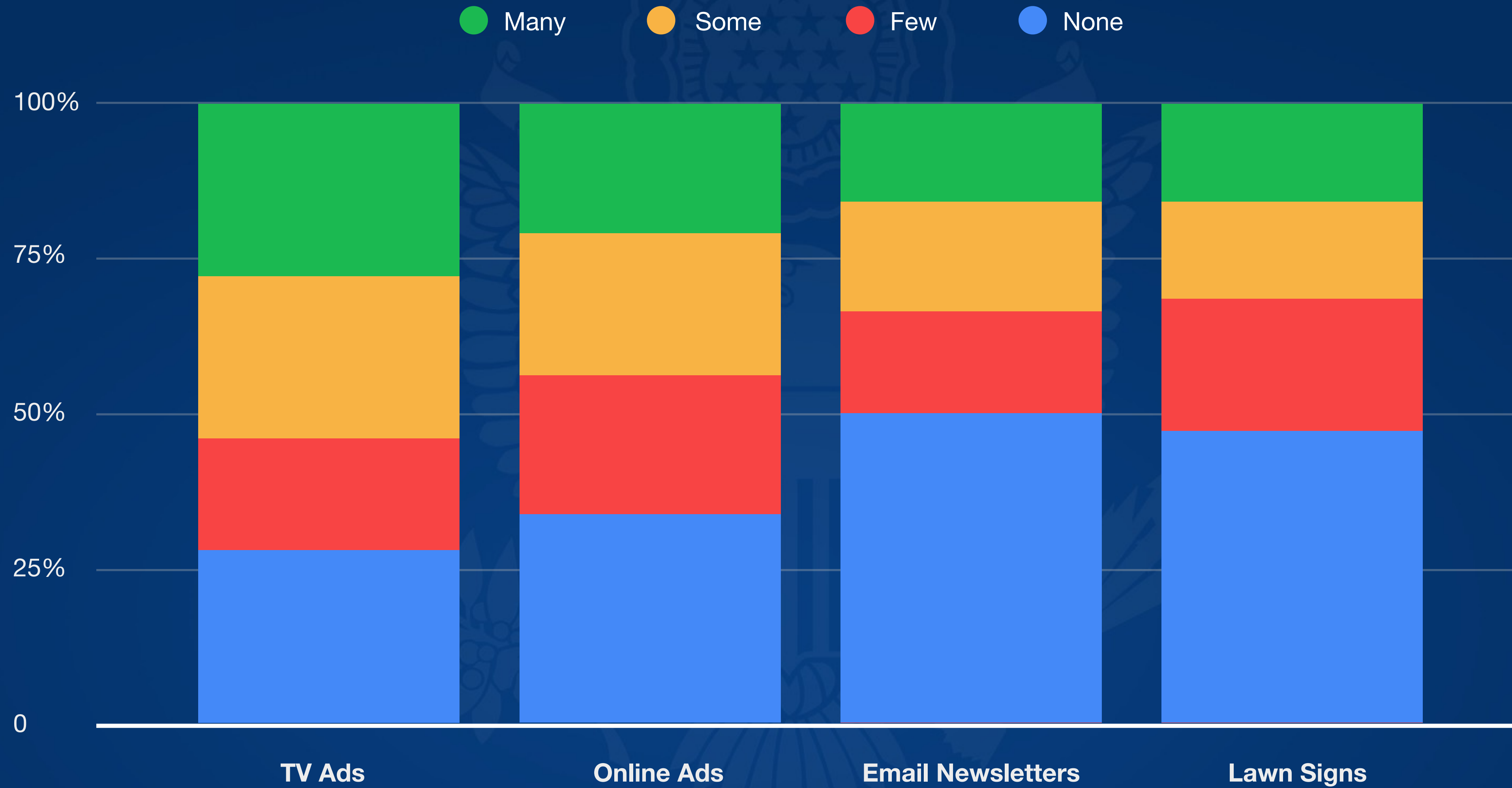
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The Ground Game

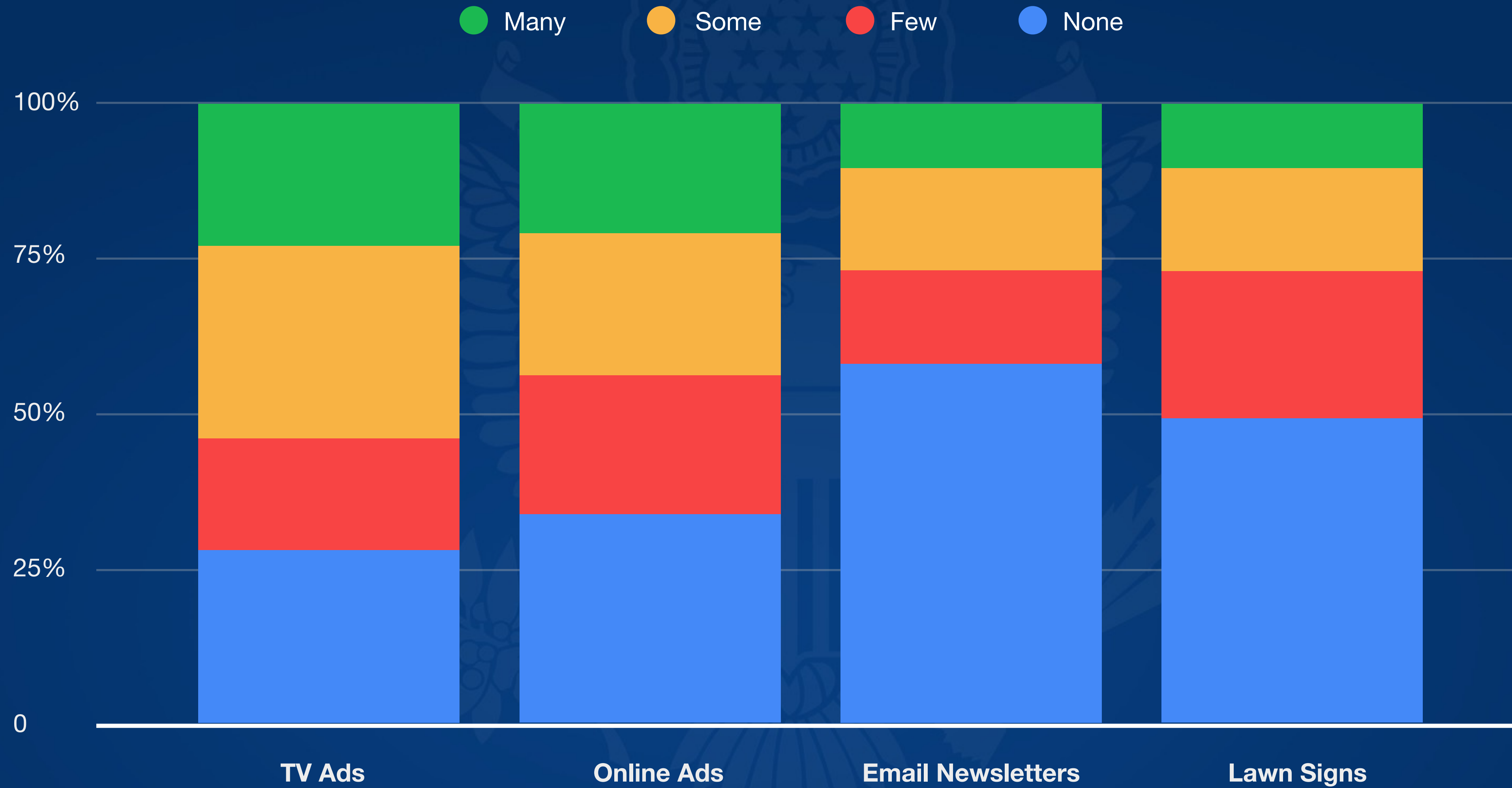
As can be seen in the results of the most recent What If Media Group poll, the Trump campaign has a perceived advantage across all categories of traditional political advertising that were asked about: people surveyed report seeing more TV ads, online ads, email

newsletters, and even good old fashioned lawn signs for Trump than for Biden. Whether this messaging advantage is driven by higher spending, or just perception, it is clear that Trump is ubiquitous in the minds of voters.

How many of these have you seen in support of Trump?



How many of these have you seen in support of Biden?



The Ground Game

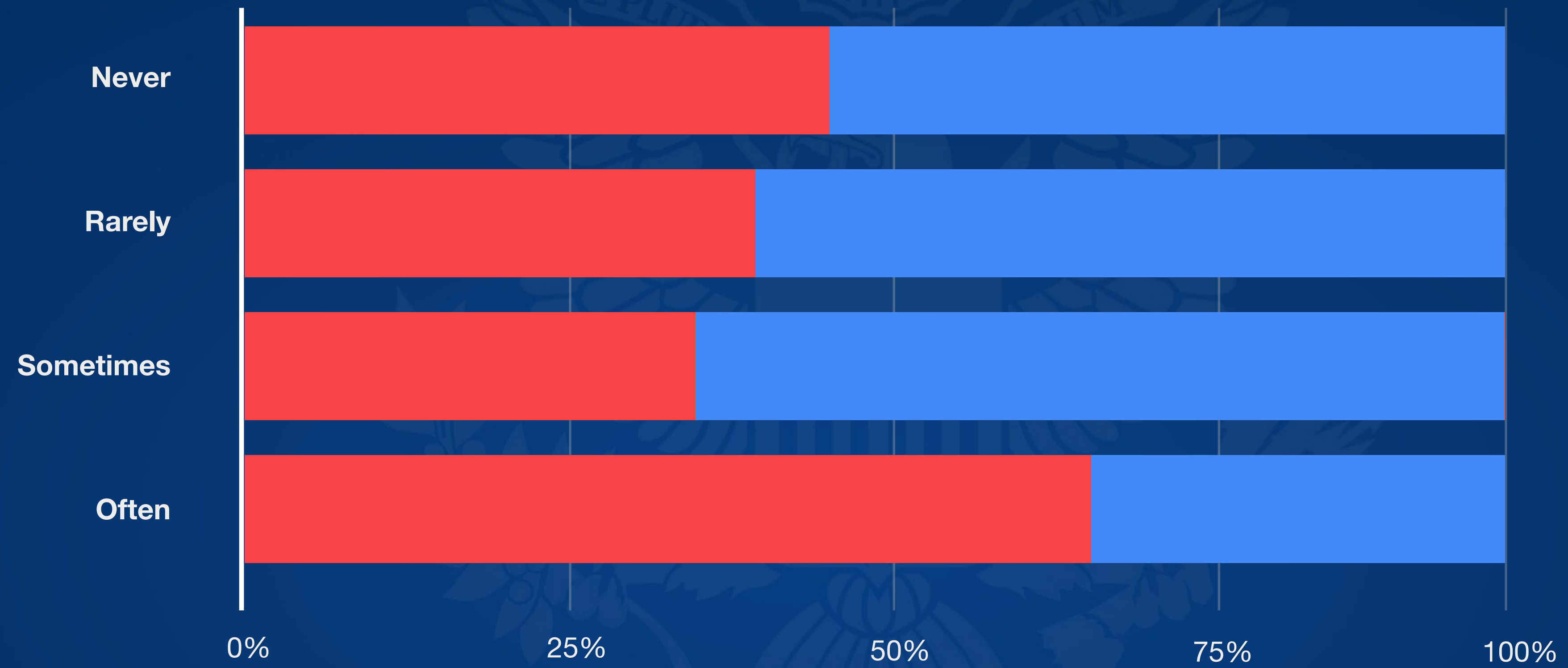
In addition to these paid media channels, the Trump campaign has an outsized advantage that the Biden campaign cannot hope to match: earned media. During the 2016 campaign, the value of Trump's earned media appearances were valued at around \$5 billion in terms of the equivalent cost of advertising—a figure that the Clinton campaign came nowhere near to matching.

This time around, with the added advantage of incumbency, the Trump campaign appears to be enjoying a similarly lopsided level of press exposure: 54% of those polled say they have “often” seen Trump in the news, compared to just 29% for Biden. Given the nature of much of this coverage, however, it remains to be seen whether this perceived advantage for Trump will translate to higher degrees of support and enthusiasm on Election Day.

“ 54% of those polled say they have “often” seen Trump in the news, compared to just 29% for Biden.”

How often do you see this candidate in the news?

● Trump ● Biden



Checking the Boxes

Predicting elections is never easy and, with the polling limitations exposed in 2016, it is clear that there is no room for pollsters to be complacent this time around. The gaps in enthusiasm, exposure to advertising and, in particular, earned media advantage for the incumbent indicate that 2020 is set to be a much tighter race than many were expecting as recently as a month ago.

For questions related to the surveys or methodology, or for general inquiries about What If Media Group's performance marketing platform, consumer data and insights, and capabilities, please email: contact@whatifmediagroup.com

About What If Media Group

Founded in 2012, What If Media Group is an award-winning performance marketing company that enables the world's leading brands to acquire valuable new customers at scale. By leveraging data-driven engagement and re-engagement strategies across multiple proprietary marketing channels and sophisticated targeting technology, and utilizing insights based on

millions of consumer ad interactions each day, What If Media Group delivers the most cost-effective and highest performing marketing campaigns for its clients. Headquartered in Fort Lee, New Jersey, What If is a recipient of Crain's 2019 Fast 50 and is a member of the Inc 5000 list of the fastest-growing private companies in America.

To learn more, please visit www.whatifmediagroup.com.



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