2024 POLITICAL LANDSCAPE

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ONE

Triangulated Approach

TWO

Main Issue in Limbo

THREE

Biden is Democrats’ best hope

FOUR

The emergence of AI-powered misinformation and manipulation tools, at scale
Triangulating is the best way to counteract bias

**CONTEXT:** Main Issues of the Day

**STRUCTURE:** The dynamics of the election

**POLLS:** A constant pulse on where the public is
85% Rule
Candidates who are strongest on the main issue win their election
The main issue is in limbo

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

*Prior to February 2021, “Economy, generally” and “Unemployment/lack of jobs” were asked separately, results on chart display the sum of both issues through that date. Have since been combined to create “Economy, unemployment, and jobs”. Other changes include “system” being added to “healthcare”, and “Inequality and discrimination” and “Public health, disease, and illness” were added as new issues. In August 2022, “the end of national abortion rights” was added and eliminated in November 2022. In January 2023, “Abortion rights” was added.
 Issue set is uncertain for 2024

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

**Independent**
- Economy, unemployment, and jobs: 23%
- Crime or Corruption: 10%
- Inequality & discrimination: 7%
- Immigration: 7%
- Environment & Climate: 7%
- Morality: 5%

**Democrats**
- Economy, unemployment, and jobs: 17%
- Inequality & discrimination: 15%
- Immigration: 3%
- Environment & Climate: 11%
- Morality: 3%

**Republicans**
- Economy, unemployment, and jobs: 27%
- Inequality & discrimination: 16%
- Immigration: 2%
- Environment & Climate: 17%
- Morality: 15%

Source: June 2-5, 2023, among 1,003 U.S. adults
Structure Matters
40% Approval Rating is a tipping point where a sitting president has better than a 50/50 chance of winning re-election.
President Biden’s approval remains at the tipping point

Overall, do you approve or disapprove of the way Joe Biden is handling his job as president? (previously ‘president-elect’)

Source: Ipsos Core Political
Biden gives Democrats the best chance in 2024

Reagan’s approval was over 60% when he left office, paving the way for his successor, George H.W. Bush

<table>
<thead>
<tr>
<th>Government approval rating</th>
<th>Incumbent</th>
<th>Successor</th>
</tr>
</thead>
<tbody>
<tr>
<td>35%</td>
<td>38%</td>
<td>2%</td>
</tr>
<tr>
<td>40%</td>
<td>55%</td>
<td>6%</td>
</tr>
<tr>
<td>45%</td>
<td>78%</td>
<td>14%</td>
</tr>
<tr>
<td>50%</td>
<td>90%</td>
<td>28%</td>
</tr>
<tr>
<td>55%</td>
<td>96%</td>
<td>49%</td>
</tr>
<tr>
<td>60%</td>
<td>98%</td>
<td>71%</td>
</tr>
</tbody>
</table>

Source: Ipsos Global Analysis
Polls are not that accurate this far out from Election Day

Accuracy of polls by time till the presidential election

Primaries
But Trump’s hold over the 2024 Republican primary remains

Looking ahead to the 2024 presidential election, who would you support as the 2024 Republican presidential nominee? Among Republicans

- **March 14-20**: Donald Trump - 44%
- **March 31-April 3**: Donald Trump - 49%, Ron DeSantis - 19%
- **April 5-6**: Donald Trump - 58%, Ron DeSantis - 21%
- **May 9-15**: Donald Trump - 49%, Ron DeSantis - 19%

Other/Don't know: 12%
Mike Pence: 5%
Liz Cheney: 3%
Nikki Haley: 4%
Immigration is an animating force in the GOP primaries

Percent who agree that
When jobs are scarce, employers should prioritize hiring people of this country over immigrants

* Question wording changes slightly between 1990-2009. It is as follows “Employers should give priority to (nation) people than immigrants”
2024 looks to be a close election

Q: If the election for president were held today and the candidates were [INSERT CANDIDATES HERE], for whom would you vote?

- Biden (D): 38%
- Trump (R): 36%
- Other: 8%
- Wouldn't vote: 8%
- Don't know / Refused: 10%

- Biden (D): 37%
- DeSantis (R): 33%
- Other: 8%
- Wouldn't vote: 9%
- Don't know / Refused: 12%

Trump as a third-party candidate splits Republican

Q: If the election for president were held today and the candidates were [INSERT CANDIDATES HERE], for whom would you vote?

- Biden (D): 37%
- DeSantis (R): 19%
- Trump (I): 22%
- Wouldn't vote: 8%
- Don't know / Refused: 13%

Of the 157 polls on the market, Biden leads in about half

Source: FiveThirtyEight Presidential Polling General Election Ballot Aggregate. Removed Partisan Ballot. Aggregation of 157 polls from late December 2022 to June 7, 2023
### Likelihood to win in 2024

<table>
<thead>
<tr>
<th>Triangulated Forecasting</th>
<th>Trump</th>
<th>Biden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>Structure matters</td>
<td>45</td>
<td>55</td>
</tr>
<tr>
<td>Polls, polls, polls</td>
<td>49</td>
<td>51</td>
</tr>
<tr>
<td>Average</td>
<td>48</td>
<td>52</td>
</tr>
</tbody>
</table>

**Source:** Ipsos Global Analysis
Culture War Vs. Economics

Either the culture wars or the economy will define the 2024 election
The emergence of AI-powered misinformation & manipulation tools, at scale
Gen AI is the ultimate low-cost, large-scale misinformation and manipulation tool

Q: When thinking about possible uses for AI, how worried, if at all, are you about each of the following? - % Very worried

- Inability to distinguish what is produced by AI vs. produced by humans: 36%
- AI will spread more misinformation online: 41%

June 6-7, 2023
April 25-26, 2023
The technology Cambridge Analytica had at their disposal before 2016 compares to today’s available AI tools ...

Cambridge Analytica and Facebook: The Scandal and the Fallout So Far
Revelations that digital consultants to the Trump campaign misused the data of millions of Facebook users set off a furor on both sides of the Atlantic. This is how The Times covered it.

EU Seeks To Avoid Another Cambridge Analytica Scandal With New Rules On Political Ads
Emma Woollacott  Senior Contributor ©
... like a horse-drawn carriage compares to a Shinkansen
Most Americans think government should act on AI

Q: How much do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Disagree</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>AI will create new jobs and opportunities to make up for the jobs that are lost</td>
<td>38%</td>
<td>42%</td>
<td>20%</td>
</tr>
<tr>
<td>The government should take action to prevent the potential loss of jobs due to AI</td>
<td>64%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Increased use of AI will lead to more income inequality and a more polarized society</td>
<td>50%</td>
<td>26%</td>
<td>25%</td>
</tr>
</tbody>
</table>

The government should take action to prevent the potential loss of jobs due to AI

- **Republican**
  - Agree: 64%
  - Disagree: 23%
  - Don’t Know: 14%

- **Democrat**
  - Agree: 67%
  - Disagree: 17%
  - Don’t Know: 17%

- **Independent**
  - Agree: 60%
  - Disagree: 21%
  - Don’t Know: 19%

Source: Ipsos Consumer Tracker, fielded January 31 – February 1, 2023 among 1,118 U.S. adults