Y² ANALYTICS

TO:	Interested parties
FROM:	Quin Monson Ph.D., Scott Riding, Luke Carter – Y² Analytics
RE:	Pivot Voters Study Results
DATE:	September 28, 2023

PIVOT VOTERS EXPRESS DESIRE TO MOVE ON FROM TRUMP; HALEY WOULD BE TOUGHEST GOP MATCHUP FOR BIDEN

The 2024 presidential primary season is in full swing, and many voters are rightly interested in which candidates would be most likely to win a general election. However, traditional general election polls a full year before Election Day must be taken with a grain of salt, as they historically have limited ability to predict the eventual election result. To better explore the contours of different potential 2024 matchups, **Y² Analytics, in conjunction with YouGov, has designed and conducted a deep dive study of Pivot Voters**. Pivot Voters are an understudied group of voters that live in battleground states and have supported nominees of different parties in recent elections, and their views provide valuable insight into which candidates are more or less likely to prevail in a general election. **Among Pivot Voters, Donald Trump is the least liked of any of the potential GOP nominees**. Meanwhile, **Nikki Haley stands out as the toughest potential Republican challenger for President Joe Biden**.

WHO ARE THE PIVOT VOTERS?

Unlike most political polls that seek to represent the views of all registered or likely voters, Y² Analytics and YouGov conducted a study that included only Pivot Voters. A Pivot Voter is any voter who:
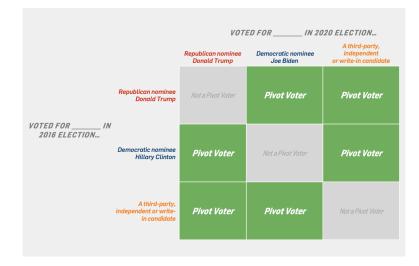
1. Lives in one of seven **key battleground states**: North Carolina, Georgia, Arizona, Wisconsin, Pennsylvania, Nevada, or Michigan[1]
2. Reports having **voted in both the 2016 and 2020** presidential general elections
3. Reports having **switched the nature of their presidential support** between these two elections, switching their support from the nominee of one major party to the other, from the nominee of a major party to a minor party candidate, or from a minor party candidate to the nominee of a major party[2]

Pivot Voters include a mix of voters who voted for Clinton and then Trump, voters who voted for Trump and then Biden, and voters who voted for a third-party candidate in 2016 or 2020. Pivot Voters are split nearly evenly between those who

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switched between the Democratic and Republican nominees and those who switched between a minor candidate and a major party candidate.

Pivot Voters are valuable to study at this stage of the campaign cycle for a few reasons:

- **Pivot Voters are politically engaged without being rigidly partisan.** Since Pivot Voters report being regular presidential voters, we have reason to believe that their views on current candidates will be fairly well-informed, even at a time when many less-partisan voters are not paying much attention to the election.[3]
- **Pivot Voters are truly persuadable.** They have shown a willingness to actually support candidates of different parties in the recent past. While Pivot Voters are not the only persuadable voters, their views may offer insight into the attitudes of other types of persuadable voters that are harder to identify, such as voters who may choose not to vote at all depending on the candidates.
- **Pivot Voters only live in key battleground states**. The 2024 presidential election is likely to be decided by voters in a handful of states. To determine who is most likely to win the presidency, we should focus on persuadable voters that live in the small number of states that are likely to determine the result of the Electoral College. Because of where they live, we expect Pivot Voters to have a disproportionate impact on the outcome of the race.

While it is impossible to know the exact number of Pivot Voters, available data suggests that Pivot Voters make up about 10% of the those who live in these states and report voting in both of the last two elections.

A survey of Pivot Voters should not be used to try to predict the final election result. However, at this stage in the campaign, information on Pivot Voters can provide valuable information about which candidates are more likely to win the support of the voters that can be decisive in a close election.

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[3] Reported voting behavior does not always align with actual recorded vote history. For this study, voters were qualified solely based on stated vote history.

PIVOT VOTERS VIEW TRUMP LEAST FAVORABLY AMONG GOP CANDIDATES

This much is certain about the current political landscape: **Donald Trump is viewed extremely unfavorably by Pivot Voters**. Donald Trump has the **worst favorability rating** of any political figure tested, with only 30% of Pivot Voters viewing him favorably compared to 70% that view him unfavorably (-40 net favorable). This is considerably worse than these voters' views of Biden, who is viewed positively by 42% and negatively by 57% (-15 net favorable). **All of Trump's major opponents for the GOP nomination are also viewed more favorably** by Pivot Voters, especially Tim Scott (+2 net favorable) and Nikki Haley (-13 net favorable). **The favorability ratings of Scott and Haley are particularly notable given that they are better than President Biden's.** However even Mike Pence, who has the second lowest favorability rating among those candidates tested (-34 net favorable), is viewed more positively than Trump.

IN MATCHUPS WITH BIDEN, HALEY SITS IN DEAD HEAT WHILE TRUMP TRAILS DISTANTLY

Pivot Voters were also asked who they would support for the presidency in a series of head-to-head matchups. Here Pivot Voters make their preferences just as clear: **while some Republican candidates poll competitively against Biden, Trump loses to Biden by a wide margin**. Pivot Voters were first asked who they would support in a race between Biden and a hypothetical "generic Republican" candidate. In this matchup, **Biden and the generic Republican are statistically tied among Pivot Voters, with Biden trailing by one point 39% to 40%** (and 22% saying that they would vote for a minor party candidate or not vote). But **in a matchup against Donald Trump, Biden leads 47% to 30%**, defeating Trump by a considerable margin of 17 points. Not only does Trump perform much worse than a generic Republican, but he also polls worse in head-to-head matchups than any other GOP candidate tested:

- **Ron DeSantis vs. Joe Biden**: Biden leads by 13 points
- **Mike Pence vs. Joe Biden**: Biden leads by 4 points
- **Tim Scott vs. Joe Biden**: Biden leads by 3 points
- **Nikki Haley vs. Joe Biden**: Biden leads by 1 point

Despite not having the best overall favorability rating, Haley polls best against Biden among Pivot Voters. Biden leads Haley by just 1 point, also a statistical tie, and she is the only candidate that performs about as well as the generic Republican. **If the GOP seeks to maximize their appeal to Pivot Voters in 2024, Nikki Haley appears to be their strongest option**.

PIVOT VOTERS SAY THAT JAN 6TH CASE IS MOST CONCERNING OF TRUMP LEGAL ISSUES

After Pivot Voters expressed their initial views of candidates and chose preferred candidates in potential matchups, they were asked to express their opinions on one of the most significant news stories of the day: the various legal challenges facing Donald Trump. Pivot Voters read a series of paragraphs describing six different legal cases involving Trump before

being asked which case they view as the most serious. **The January 6th election case was viewed as the most serious case by a plurality (37%) of Pivot Voters**. This was followed by the classified documents case, which 33% selected as most serious case. The New York state case involving Stormy Daniels was generally regarded as the least serious, with only 3% saying that it was the most serious of the various cases tested.

In a comparative bright spot for Donald Trump, **reading information on the cases facing Trump did not appear to meaningfully impact Pivot Voters' opinions of him**. 70% of Pivot Voters expressed an unfavorable opinion of Donald Trump before reading information about these cases; this worsened by only four points to 74% unfavorable after reading this information. This lack of movement suggests that Pivot Voters' views of the former president are largely settled.

CONCLUSION: PIVOT VOTERS SEEK FRESH FACE IN 2024

Election Day 2024 is nearly a year away. In the coming months, Republicans will choose a candidate to face Joe Biden in the general election. This Pivot Voters study offers us valuable information on the race by providing a glimpse into the minds of an engaged group of voters that could decide the presidency.

Pivot Voters' preferences are clear: **Donald Trump is the most disliked of all of the potential 2024 GOP nominees, and he performs worse against Biden than any of the other candidates running for the Republican nomination**. While Biden handily leads Trump in a head-to-head matchup, **Biden leads Nikki Haley by only a single point**, proving that **many Pivot Voters would support some (but not all) of the potential GOP nominees**. Which candidate will eventually earn that nomination, and whether that candidate can appeal to enough Pivot Voters to prevail on Election Day, will be determined in the months ahead.

METHODOLOGY

Between September 12 – 25th, 2023, Y2 Analytics and YouGov conducted a survey of 800 Pivot Voters who are registered to vote in the US. For this survey, interviews were conducted with 800 Pivot Voters who are registered to vote in the US. For the purposes of our research design, Pivot Voters are defined as voters living in battleground states who reported voting in 2016 and 2020, and they also reported switching their support in the presidential race from one party category to another between elections. The battleground states sampled for this study were Arizona, Georgia, Michigan, Nevada, North Carolina, Pennsylvania, and Wisconsin. Party categories are defined as Republican, Democrat, and third party/Independent/write-in. Interviews were conducted online by YouGov. Retrospective 2016 and 2020 vote data was self-reported by respondents.

YouGov interviewed 936 respondents who were then matched down to a sample of 800 to produce the final dataset. The respondents were matched to a sampling frame on gender, age, race, and education. The frame was constructed by stratified sampling of a subset of the 2020 Cooperative Election Study (CES) with selection within strata by weighted sampling with replacements. The matched cases were weighted to the sampling frame using propensity scores. The matched cases and the frame were combined and a logistic regression was estimated for inclusion in the frame. The propensity score function included age, gender, race/ethnicity, years of education, and region. The propensity scores were grouped into deciles of the estimated propensity score in the frame and post-stratified according to these deciles. The weights were then post-stratified on 2020 presidential vote choice as well as gender, age, race, and education, to produce the final weight. Sampling margin of error is +/- 3.46%.