Post-Debate Landscape

June 30, 2024

Key Takeaways Part 1

- These findings represent a snapshot of the landscape in the debate's immediate aftermath. It is possible that they can shift in either direction in coming days, and we will continue to monitor closely.

- In tracking of whether voters feel more or less favorably towards Biden based on what they've heard in the past week, the share of those feeling more favorable hit an all-time low, with a magnitude of drop similar to the one we saw after the Afghanistan withdrawal.

- In terms of horse race, post-debate polling shows that in the 72 hours following the debate:
    - Biden's vote share in the two-way horse race declined by -0.8pp.
    - Similarly, Biden's vote share against Trump in the multi-way also declined by -0.8pp.

- In what has been a generally steady race, these declines represent the the largest single-week drop since horse race tracking began in late 2021.

- They also occur in the shadow of what had been a challenging position before the debate:
    - Prior to the debate, Biden's vote share was already 4pp lower (8pp on margin) than his winning vote share in 2020.
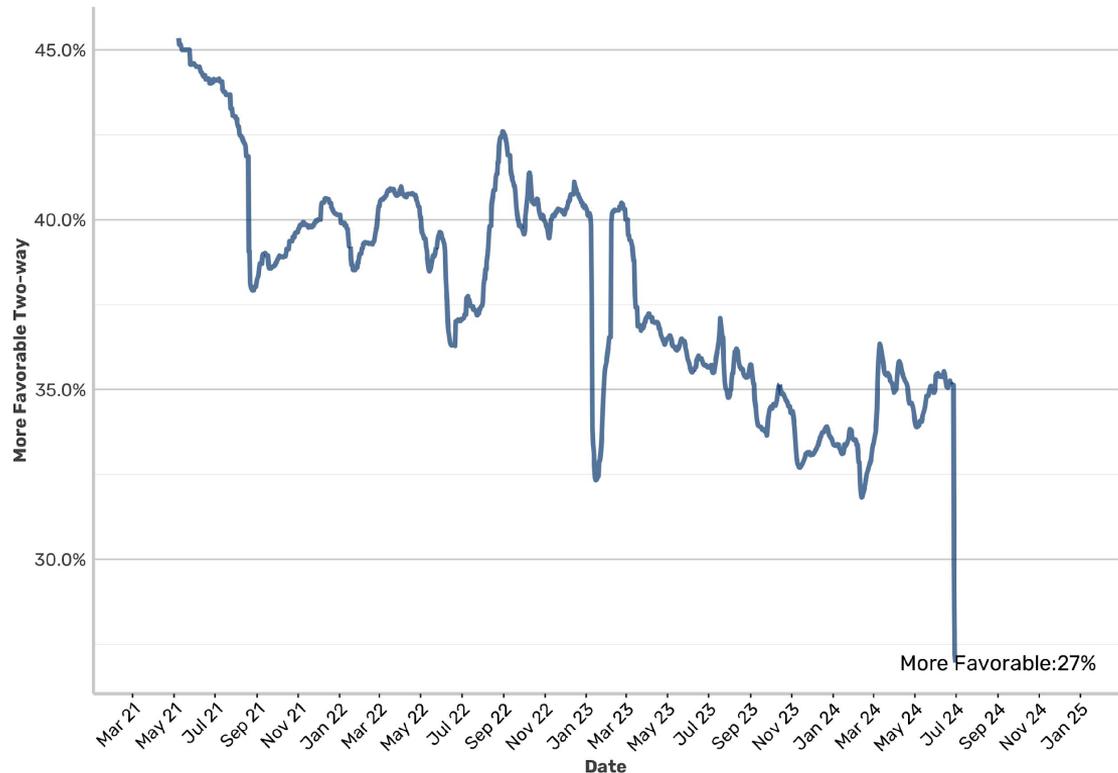
Key Takeaways Part 2

- Underpinning the decline is an increase in already-high concerns about the President's age, and a growing split among Democrats about what should happen with his candidacy.

- A significant majority (69%) of voters are very or somewhat concerned about the impact of Biden's age on his ability to do the job of president.

- 40% of Biden '20 voters now say he should end his campaign, compared to 45% who say he should stay in the race. This represents a significant shift in this metric from May, when Biden '20 voters were more firmly behind the President's candidacy (25% step aside, 62% stay in the race).
  - Swing voters would prefer Biden leave the race by a nearly 2-to-1 margin.

- Democrats other than POTUS outperform him in a horse race against Trump, in some cases by a large margin.
  - This represents a significant shift from when this question - tracked to predict public polling narratives - was last asked in September of 2023.
  - At that time, no candidate outperformed POTUS, with new data showing a marked change in this dynamic over time.
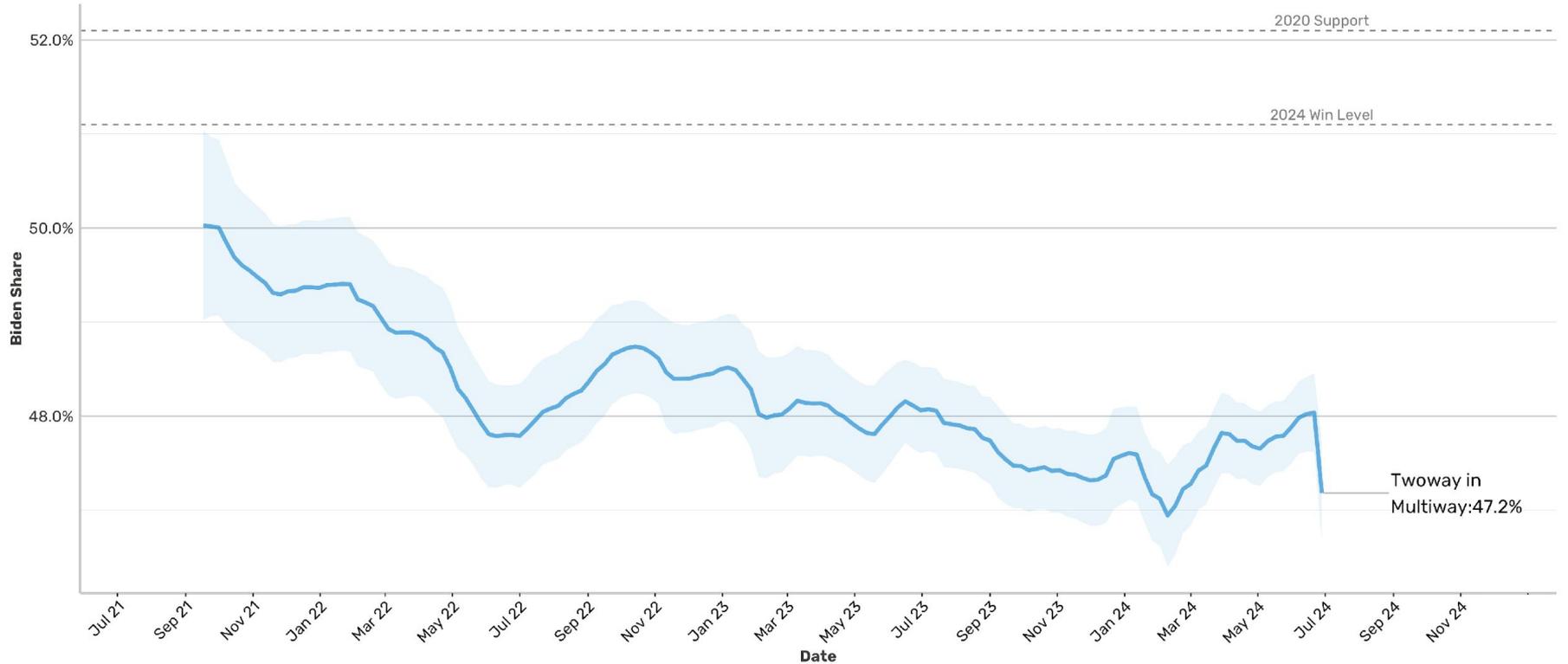
After the debate, the share of voters for which the previous week's news made them "more favorable" towards Biden is at an all-time low (27%)

*Would you say that what you've heard about Joe Biden in the last week makes you think **more favorably** of Joe Biden, less favorably of Joe Biden, or does it not make a difference?*

We saw similar magnitude drops in tracking during the Afghanistan withdrawal and classified documents case, but this is the lowest this metric has been since tracking began in 2021.

More Favorable:27%

Since the debate, Biden's vote share against Trump has declined -0.8pp nationally

In a multi-candidate ballot, Biden trails Trump by 7.3pp in the Electoral College tipping point

Biden's national popular vote share in the multi-candidate ballot sits at 37.6%, -6pp from Trump, which allocates out to 47.2% in a two-way between Biden and Trump.

In Pennsylvania, the state that now represents the tipping point, POTUS trails Trump by 7.3pp.

At this moment post-debate, POTUS trails in New Hampshire and is narrowly behind in Virginia and New Mexico.

State	Cumulative EVs	Post Debate Margin	Pre Debate Margin	Margin Drop	Biden Multiway	Trump Multiway	Third Party	Undecided Multiway
CO	191	1.9%	3.7%	-1.8%	40.4%	38.5%	8.6%	12.5%
MN	201	0.4%	2.4%	-2.0%	40.0%	39.6%	8.1%	12.2%
ME-State	**203**	**0.2%**	2.2%	-2.0%	40.0%	39.8%	7.9%	12.2%
NM	208	-0.5%	1.9%	-2.4%	40.1%	40.6%	7.7%	11.6%
VA	**221**	-0.6%	**1.5%**	-2.1%	40.1%	40.7%	6.9%	12.2%
NH	225	-2.8%	-0.5%	-2.3%	39.0%	41.8%	7.7%	11.6%
WI	235	-4.2%	-2.2%	-1.9%	38.1%	42.3%	7.5%	12.1%
NE-2	236	-4.3%	-2.6%	-1.7%	38.1%	42.4%	7.4%	12.2%
MI	251	-6.9%	-5.1%	-1.8%	37.3%	44.2%	6.2%	12.3%
PA	**270**	**-7.3%**	**-5.1%**	**-2.2%**	38.3%	45.6%	5.9%	10.1%
NV	276	-8.8%	-6.9%	-1.9%	35.4%	44.2%	8.0%	12.3%
AZ	287	-9.7%	-7.6%	-2.1%	35.7%	45.4%	7.5%	11.4%
GA	303	-10.1%	-7.9%	-2.2%	36.7%	46.8%	5.6%	11.0%
NC	319	-10.6%	-8.5%	-2.1%	36.3%	46.9%	5.8%	11.0%

A significant majority (69%) of voters are very or somewhat concerned about the impact of Biden's age on his job as president

This includes 45% of 2020 Biden voters, up +9pp from the beginning of June.

Among swing voters, 68% are very or somewhat concerned, up from 59% in early June.

Post-Debate: Are you concerned about President Biden's age impacting the job that he is doing as President?

Response	Overall	2020 Vote: Biden	2016 x 2020 Vote: Swing	2020 Vote: Trump
Very concerned	54%	24%	51%	86%
Somewhat concerned	15%	21%	17%	6%
A little concerned	15%	26%	17%	4%
Not at all concerned	15%	27%	13%	3%
Not sure	2%	2%	2%	1%

Early June: Are you concerned about President Biden's age impacting the job that he is doing as President?

Response	Overall	2020 Vote: Biden	2016 x 2020 Vote: Swing	2020 Vote: Trump
Very concerned	46%	19%	42%	74%
Somewhat concerned	15%	17%	17%	11%
A little concerned	17%	27%	18%	6%
Not at all concerned	17%	33%	18%	4%
Not sure	6%	5%	6%	5%

Biden voters are split on whether he should stay in the race; Swing voters prefer he exit by a nearly 2-to-1 margin

In May, Biden voters favored the President remaining in the race by 37pp. This is now at 5pp, indicating a significant shift in the debate's aftermath.

Among swing voters, who had been evenly split in May, 55% now say he should step aside compared to just 29% who say he should stay in the race.

Post-Debate: Which of the following comes closer to your views on the 2024 presidential election?

Response	Overall	2020 Vote: Biden	2016 x 2020 Vote: Swing	2020 Vote: Trump
Joe Biden should step aside and suspend his 2024 re-election campaign so a different Democrat can run against Donald Trump	52%	40%	55%	64%
Joe Biden should continue running for President against Donald Trump	32%	45%	29%	22%
Not sure	16%	15%	16%	14%

Early May: Which of the following comes closer to your views on the 2024 presidential election?

Response	Overall	2020 Vote: Biden	2016 x 2020 Vote: Swing	2020 Vote: Trump
Joe Biden should step aside and suspend his 2024 re-election campaign so a different Democrat can run against Donald Trump	43%	25%	42%	61%
Joe Biden should continue running for President against Donald Trump	38%	62%	40%	18%
Not sure	19%	13%	18%	22%

Alternative Candidate Polling

Biden has significantly lower favorability than alternative Democrats

Biden net fav is underwater at -21pp, Harris is slightly higher, but still decidedly underwater, at -11 net fav.

The Net-Fav and Fav Two-way metrics have similar rank-orders indicating that all of these candidates are roughly equally known by Democrats and Republicans.

Candidate	Fav	Unfav	Dk	Net Fav	Fav Twoway
Buttigieg	32%	28%	40%	3.4%	51%
Whitmer	24%	21%	55%	2.4%	52%
Newsom	28%	32%	40%	-3.9%	47%
Harris	41%	52%	7%	-10.7%	44%
Biden	38%	60%	2%	-21.2%	39%
Trump	44%	54%	2%	-10.0%	45%

All alternatives would improve upon Biden's standing against Trump, which is a change from earlier data showing all were comparable

These range from modest (Harris' EVs ranging from 231-240, contingent on whether we adjust for name recognition or not), while Buttigieg and Whitmer would be above 50% in states totaling 260-301 electoral votes.

In September '23, we did not see meaningful differences between the candidates.

Candidate	Overall			Name Recognition Adjusted		
	Natl Two-way	Two-way in Tipping Point State	Expected EVs	Natl Two-way	Two-way in Tipping Point State	Expected EVs
Biden	48.3%	47.5%	223	48.3%	47.5%	223
Buttigieg	51.0%	49.6%	261	52.9%	51.1%	301
Harris	49.1%	48.0%	231	49.8%	48.6%	240
Newsom	49.6%	48.7%	239	50.0%	48.8%	245
Whitmer	50.6%	49.7%	260	52.2%	51.1%	290

September 2023 Polling

	Allocated Natl Two-way	Dem Candidate	Trump	Not Sure
Biden	49.2%	44.8%	48.5%	6.7%
Buttigieg	49.8%	43.1%	47.4%	9.4%
Harris	49.9%	45.2%	48.5%	6.3%
Newsom	49.5%	42.1%	47.8%	10.1%
Whitmer	49.9%	42.8%	47.4%	9.8%

Among all voters, support for alternative Democrats is 0.6-2.7pp higher on average in battleground states

All alternative candidates poll ahead of Biden in every battleground state.

Buttigieg and Whitmer over-perform the most, with both leading or tied in the states that get them to 270 electoral votes.

Two-way Horse Race Among Everyone

State	Biden	Buttigieg	Harris	Newsom	Whitmer
WI	49.3%	52.2%	49.6%	50.5%	51.7%
NE-2	48.8%	51.4%	49.2%	49.9%	51.4%
PA	47.6%	49.6%	48.0%	48.7%	49.7%
MI	47.5%	50.6%	48.8%	49.4%	53.6%
NV	46.6%	49.9%	47.4%	47.9%	48.3%
GA	46.3%	47.7%	46.6%	46.7%	47.5%
AZ	46.1%	48.9%	46.7%	47.8%	47.8%
NC	45.9%	48.3%	46.8%	47.1%	48.1%

Limiting to voters who have heard of each candidate, support is 1.3-4.5pp higher on average for some alternative Democrats

Accounting for name recognition, Buttigieg and Whitmer show more significant improvement, with both leading outright or tied in all current battleground states.

Neither Harris or Newsom benefit from the name recognition adjustment.

Name Recognition Adjusted Two-way Horse Race

State	Biden	Buttigieg	Harris	Newsom	Whitmer
WI	49.3%	53.9%	50.1%	50.7%	53.1%
NE-2	48.8%	53.7%	49.6%	50.3%	53.3%
PA	47.6%	51.1%	48.6%	48.8%	51.1%
MI	47.5%	52.3%	49.6%	49.8%	53.7%
NV	46.6%	52.5%	48.3%	48.4%	51.7%
GA	46.3%	50.2%	47.2%	47.9%	49.7%
AZ	46.1%	50.8%	47.4%	48.1%	49.7%
NC	45.9%	50.0%	47.5%	47.5%	49.7%

Appendix: Alternative Candidate Polling Definitions

Polling and comparing hypothetical match-ups is challenging because candidates hold different levels of name recognition. Below are a set of metrics we use to work with these challenges:

"Net Favorability" - Current share of voters that hold a favorable opinion of each candidate minus the share of voters that hold an unfavorable of that candidate. This metric is influenced by how well known the candidate is, and can be misleading if a candidate is better known by one party's voters than the other.

"Favorability Two-way" - Percentage of voters that hold a favorable versus unfavorable view of each candidate, extrapolating based on the voters that do have an opinion of the candidate. This metric tries to mitigate the issues with candidates having different levels of name recognition (and differentially by party), by effectively taking the views of voters that have an opinion of the candidate and extrapolating them out (using demographics, voter file models) to the voters that don't have an opinion.

"Two-way Horse Race Among Everyone" - We ask voters whether they would vote for a specific alternative named candidate versus Trump. We take the responses of those that have an opinion when pushed (including pushes of people who say they're voting third party), and extrapolate those preferences out to currently undecided voters (i.e., the entire electorate). This can be seen as the "lower end" on support for candidates not widely known by the electorate.

"Name Recognition Adjusted Two-way Horse Race" - Similar to 'Favorability Two-way,' we limit the horse race data to only those that have name recognition for a specific alternative named candidate, and extrapolating out their views (using demographics, voter file) to that voters that don't have an opinion. We do this because we know that if a survey respondent does not know who a candidate is, they are less likely to report voting for them (biasing down the head-to-head for lesser-known candidates). This can be seen as the "upper end" on support for candidates not widely known by the electorate.