

# Third Way Double Haters Segmentation Survey

May 2024 Analysis



**THIRD WAY**

# Methodology

## Voters

Global Strategy Group conducted a survey of **1000 'Double Haters' – Registered Voters who are unsatisfied with both Trump and Biden – nationwide** between April 24 and May 2, 2024.

## Confidence Level

The survey has a confidence interval of +/- 3.1%.

All interviews were conducted via web-based panel. Care has been taken to ensure the geographic, political, and demographic divisions of the population of nationwide registered voters are properly represented.

# Objectives

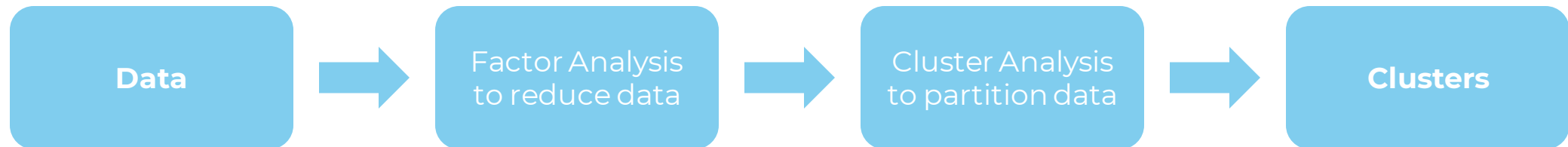
- Determine how many different groups of double haters exist, what they look like demographically and attitudinally, and how they feel about politics and issues
- Understand what unites groups of double haters and what divides them
- Begin to determine which double haters could be most movable

## **Ultimately, we'll use the results here to:**

- Influence press in how they write about double haters (they aren't a monolith!)
- Inform who we target in future research
- Begin to understand the messaging/communications strategy for moving double haters to vote for Biden
- Create a baseline so we can track how double haters change and move from now until Election Day

# The Process

- We collected responses to dozens of questions
- We used **factor analysis** to help structure and summarize the data
  - Reduces data dimensionality (transforms multiple variables into fewer) by identifying underlying traits and attitudes
  - Condenses large amounts of data into a smaller set of variables that capture most of the information
- And then applied **cluster analysis** to partition data into meaningful groups
  - Groups observations into clusters based on their similarity
  - The goal is to minimize the within-cluster variation and maximize the between-cluster variation



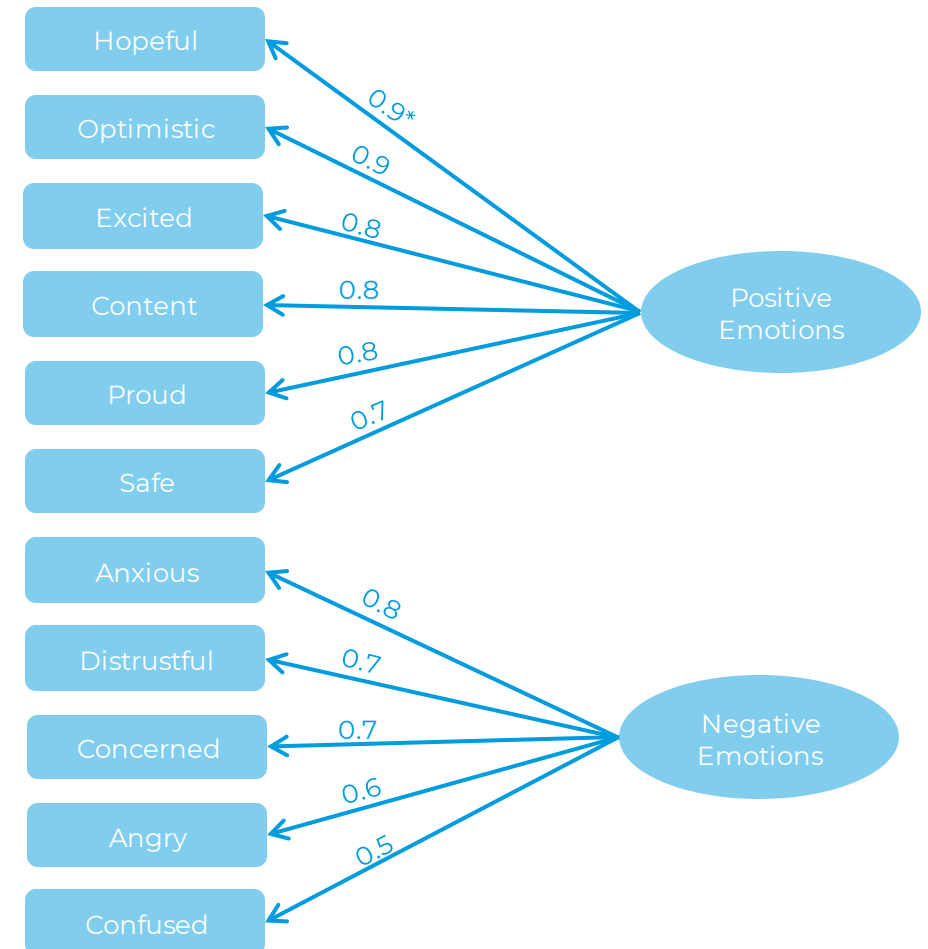
- Difference between factor and cluster analysis:
  - Factor Analysis aims to uncover underlying factors that explain correlations among variables, while Cluster Analysis focuses on grouping similar objects together

# Factor Analysis

- **Factor Analysis** is a statistical method that captures underlying attitudes and traits from multiple questions. We used it to summarize our batteries using a smaller number of unobserved variables called factors.
  - Factor loadings show how each variable is related to each factor.
  - We assign meaning to the factors based on the loadings of observed variables.
  - We can use the factor loadings to construct variables to use at the cluster analysis stage.
  - In the example to the right, responses to the battery items were heavily correlated in a way that suggested two underlying variables: positive and negative emotions.
    - For example, "Hopeful" was very correlated with "Optimistic," while "Anxious" was very correlated with "Concerned."

Example: 11 variables were reduced into 2 factors of positive and negative emotions.

B9. Please indicate how you have felt about Joe Biden's time as president.



# Segmentation Process

- We used **K-means cluster analysis**: method that groups similar objects or observations into clusters. K-means iteratively assigns data points to clusters based on their similarity. Each observation is assigned into an exclusive group/cluster.
  - We generated groups of similar observations into clusters based on normalized factor scores obtained from factor analysis and original variables.
  - We explored multiple possible solutions before settling on one.
- **Final Clustering Criteria:**
  - Eliminated factors implicitly recalling party affiliation to look beyond partisanship.
  - Used 22 factors derived from 78 questions:
    - **Personal and political values** (B2, B3, B7)
    - **Trust in institutions** (B4)
    - **Political issue preferences** (B5, B6)
    - **News consumption and hobbies** (BNEWS, B14)
    - **Political engagement** (P2)
- **Results:** We settled on 4 clusters to profile and compare.

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# **Double Haters at A Glance**



# There are four core groups of Double Haters that emerged from the segmentation analysis. They each exhibit different behaviors, hold different attitudes, and are comprised of different demos

Each of the profiles below and detailed on the slides that follow demonstrate the archetypes of each group. These profiles do not speak for everyone who comprises each group (as you can see in the demographic composition of each group), but rather serve as strong examples of who we are predominantly talking about.

## Turnout Risks

*29% of double haters*



## Young Progressives

*19% of double haters*



## Safety Hawks

*24% of double haters*



## Trump Leaners

*28% of double haters*





# Demographics of Double Haters

Gender	Overall	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
Men	45	42	31	59	43
Women	54	56	66	40	57

Age	Overall	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
Ages 18-29	25	35	48	16	5
Ages 30-44	26	32	30	31	13
Ages 45-54	13	11	9	20	12
Ages 55-64	15	12	5	14	25
Seniors 65+	22	10	8	19	46

Education	Overall	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
Non-College	62	69	67	56	58
College	38	31	33	44	42

Density	Overall	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
Rural	28	30	30	21	32
Suburban	38	40	31	41	39
Urban	33	30	39	38	29

Region	Overall	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
Northeast	18	15	19	23	16
Midwest	23	21	18	20	29
South	35	37	27	38	37
West	24	26	36	19	18

Ethnicity	Overall	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
White	70	72	70	54	82
Black	12	12	12	22	5
Latino	11	10	14	18	4
AAPI	5	3	5	7	6

Party ID	Overall	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
Democrat	35	32	58	38	19
Independent	36	51	28	30	33
Republican	29	17	13	32	49

Ideology	Overall	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
Liberal	27	26	58	23	11
Moderate	49	57	34	50	50
Conservative	24	17	8	27	39

2020 Vote	Overall	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
Biden	41	37	57	47	31
Trump	28	18	12	30	47
Other/Didn't vote	30	45	31	23	22

# Profile of a Turnout Risk

***Less educated and less engaged women. They are most concerned about the rising cost of living, but don't like the dishonesty and lack of accountability surrounding Trump.***

## Meet Julie:

- White suburban woman
- Between the ages of 18-44
- Did not graduate college
- Didn't vote in 2020 or 2022
- Disapproves of both Biden and Trump (though even more disapproving of Biden than Trump)
- Identifies as independent
- Is undecided or is thinking of voting for RFK Jr. and says she isn't open to either Biden or Trump, but she does ultimately favor Biden when push comes to shove
- Her core values: Honesty, Freedom, and Accountability
- Her top issues: Inflation and the cost of living
- Believes abortion should be legal but with some restrictions



## **OUR MESSAGING IMPERATIVES:**

- Make sure people like Julie show up on Election Day
- Disqualify RFK Jr. for these voters

# Profile of a Young Progressive

***Younger women who are progressive and dissatisfied with both Biden and Trump, but ultimately know Biden is the best option they have (more aligned with their values).***

## Meet Tara:

- White urban woman
- Between the ages of 18-29
- Did not graduate college
- Biden 2020 voter, but didn't vote in 2022
- Disapproves of both Biden and Trump
- Identifies as a liberal Democrat
- Says she isn't open to either Biden or Trump, but ultimately votes for Biden in both the multi-candidate and two-way vote
- Her core values: Honesty, Equality, and Accountability
- Her top issues: Inflation and the cost of living, and health care
- Believes abortion should be legal in all cases



## OUR MESSAGING IMPERATIVES:

- Remind them there are only 2 choices: Biden and Trump
- And remind them that Trump is a BAD choice for them and their values

# Profile of a Safety Hawk – Our TRUE Persuadable Voter

***Predominantly suburban men, and more likely to be Black or Latino than any other group. They are most focused on their family's safety and voted Biden in 2020 but are torn today***

## **Meet Marcus:**

- Suburban man (more likely to be Black or Hispanic than any other group)
- Between the ages of 45-64
- Did not graduate college
- Biden 2020 voter
- Much more disapproving of Biden than Trump, though he isn't happy with Trump either
- Identifies as a moderate Republican
- Is planning to vote for RFK Jr., and he's torn when left with the choices of just Biden and Trump
- His core values: Freedom, Honesty, Safety, and Accountability
- His top issues: Inflation and the cost of living, jobs and the economy, and crime and public safety
- Believes abortion should only be legal in certain situations



## **OUR MESSAGING IMPERATIVES:**

- Remind them why Trump is untenable

# Profile of a Trump Leaner

***Older women from rural communities who care about their family more than anything. They voted for Trump in 2020 but aren't satisfied with him or Biden, though they stick with Trump for his economic policies without a solid alternative.***

## Meet Sandy:

- White rural woman
- Is a senior (age 65+)
- Did not graduate college
- Voted in both 2020 and 2022, Trump 2020 voter
- Strongly disapproves of Biden, and isn't satisfied with Trump, but not too disapproving of him overall
- Identifies as a Republican
- RFK Jr. is her first choice in the vote for President, but when her only options are Biden or Trump, she chooses Trump
- Her core values: Honesty, Family, Freedom, and Safety
- Her top issues: Inflation and the cost of living
- 13 ○ Believes abortion should only be legal in certain situations



## OUR MESSAGING IMPERATIVES:

- This is the toughest group for Biden to get, so the goal is to keep them away from Trump...which could perhaps mean taking the risk of elevating RFK Jr.

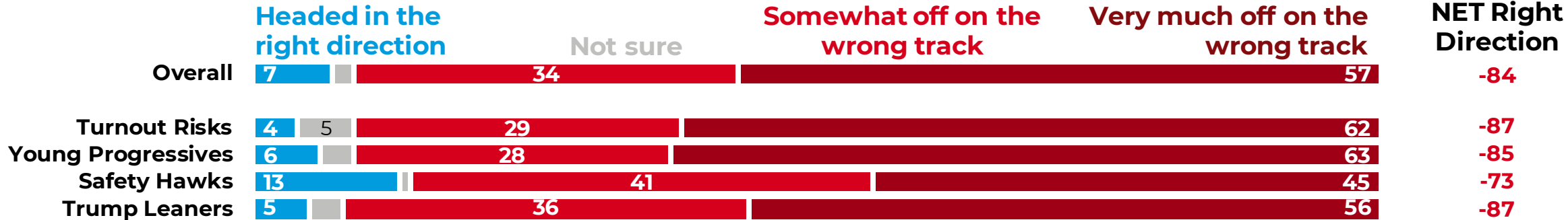
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# **The Landscape Through the Eyes of Double Haters**

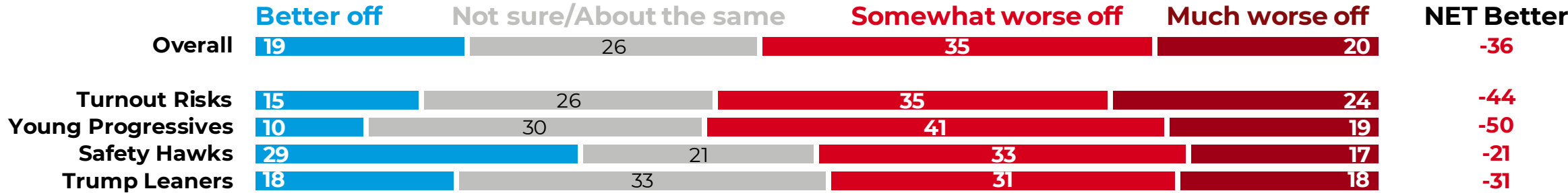


# Double haters are pessimistic about how things are going today, especially Turnout Risks and Young Progressives

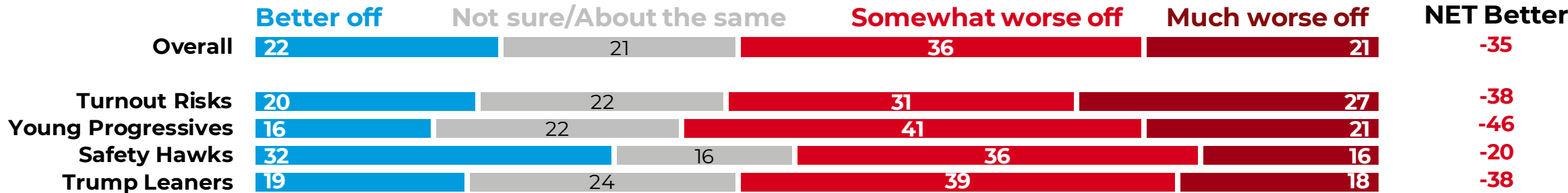
Generally speaking, would you say the country today is...



Thinking ahead to a year from now, do you think the country will be...

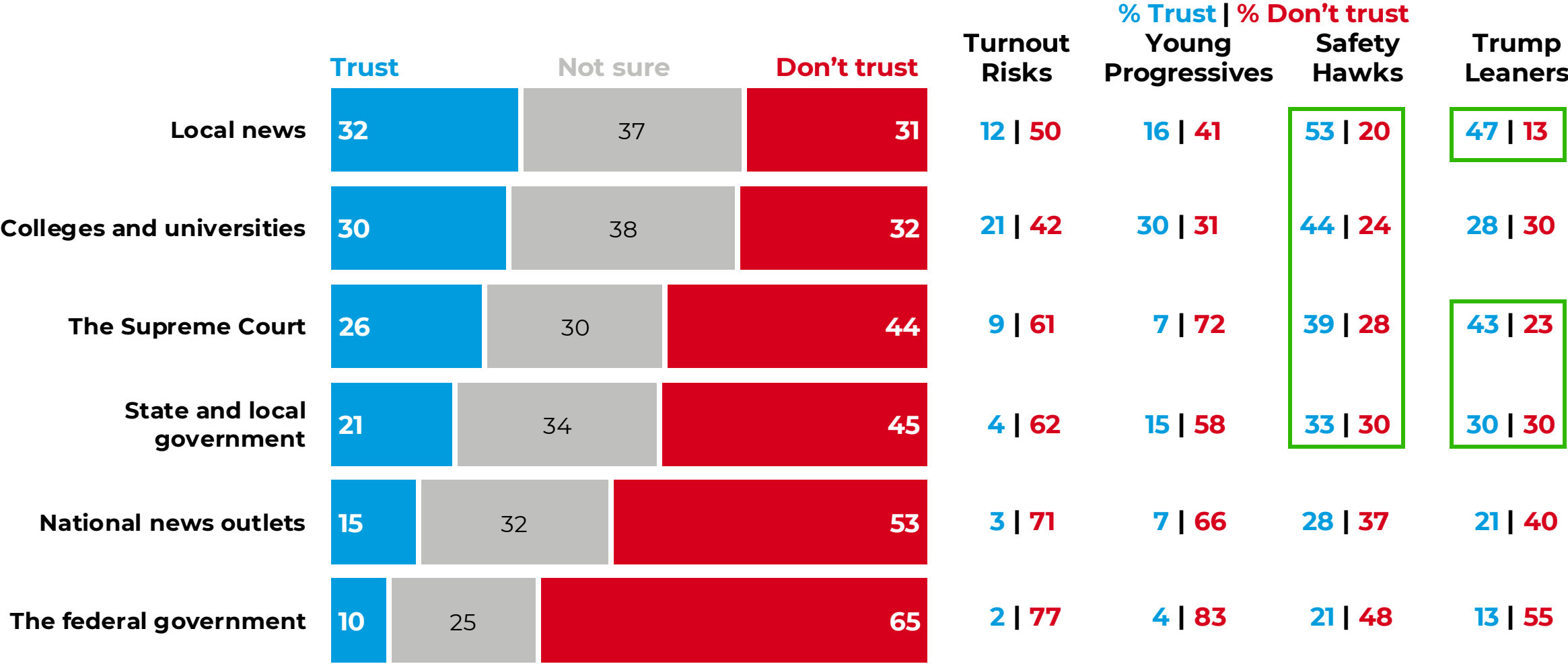


Thinking ahead to a year from now, do you think the economy will be...



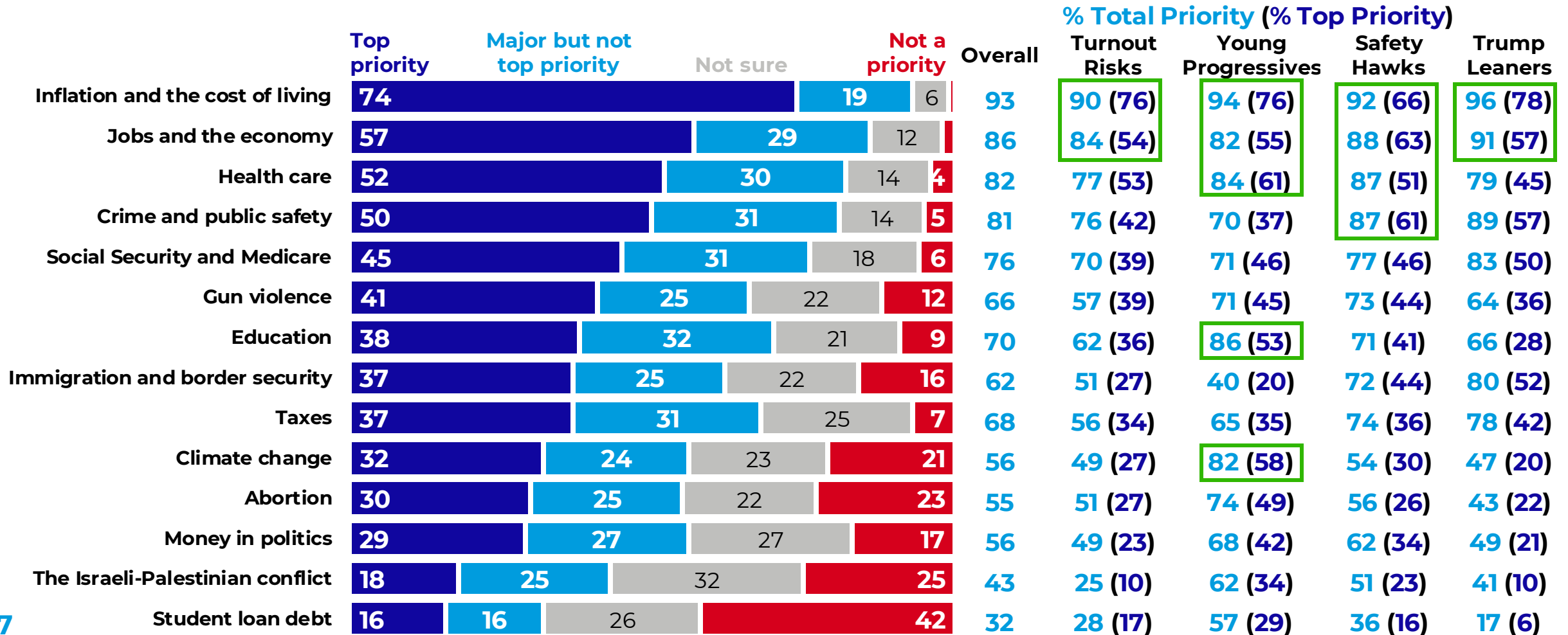
# Safety Hawks are most trusting of institutions. Trump Leaners trust local institutions and the Supreme Court. Turnout Risks and Young Progressives are the most distrusting

Trust for Institutions



# Inflation and jobs/the economy are the top issues across Double Haters. Young Progressives also focused on climate change, education, and health care. Safety Hawks focused on crime too.

Issue Priorities for the Next President

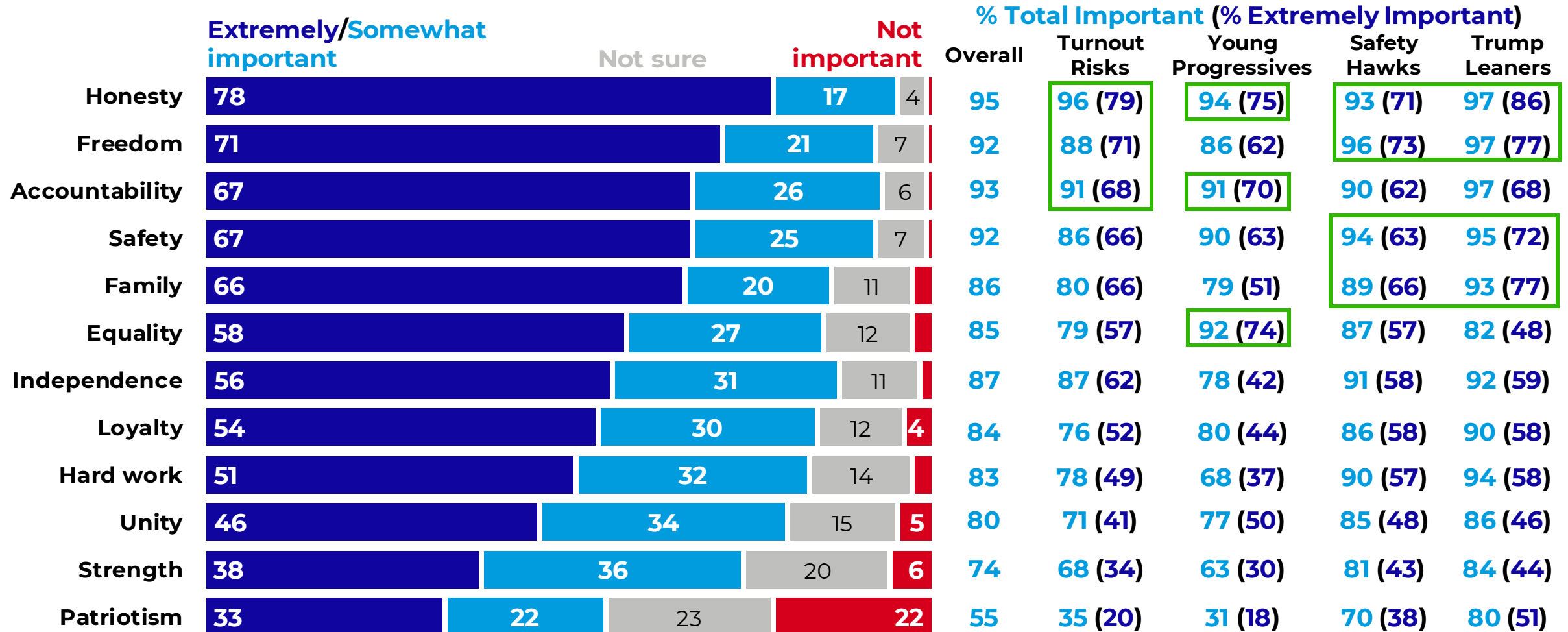


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# **Values and Behaviors of Double Haters**

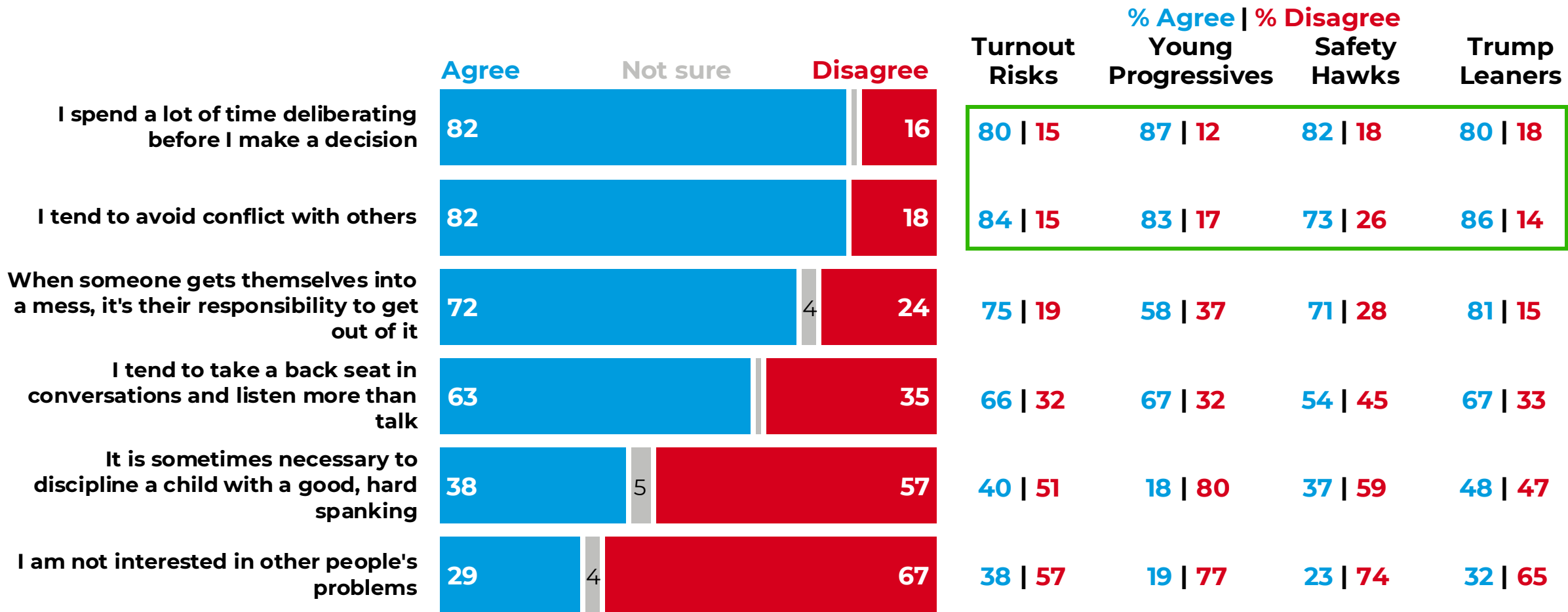
# Honesty, accountability, and freedom are core values across double haters. Young Progressives care about equality, while Safety Hawks and Trump Leaners care about family and safety

Importance of Values



# Double Haters tend to be conflict-averse and indecisive. Most believe in individual responsibility and accountability (less so for Young Progressives)

Agree/Disagree Statements Related to Values and Confidence

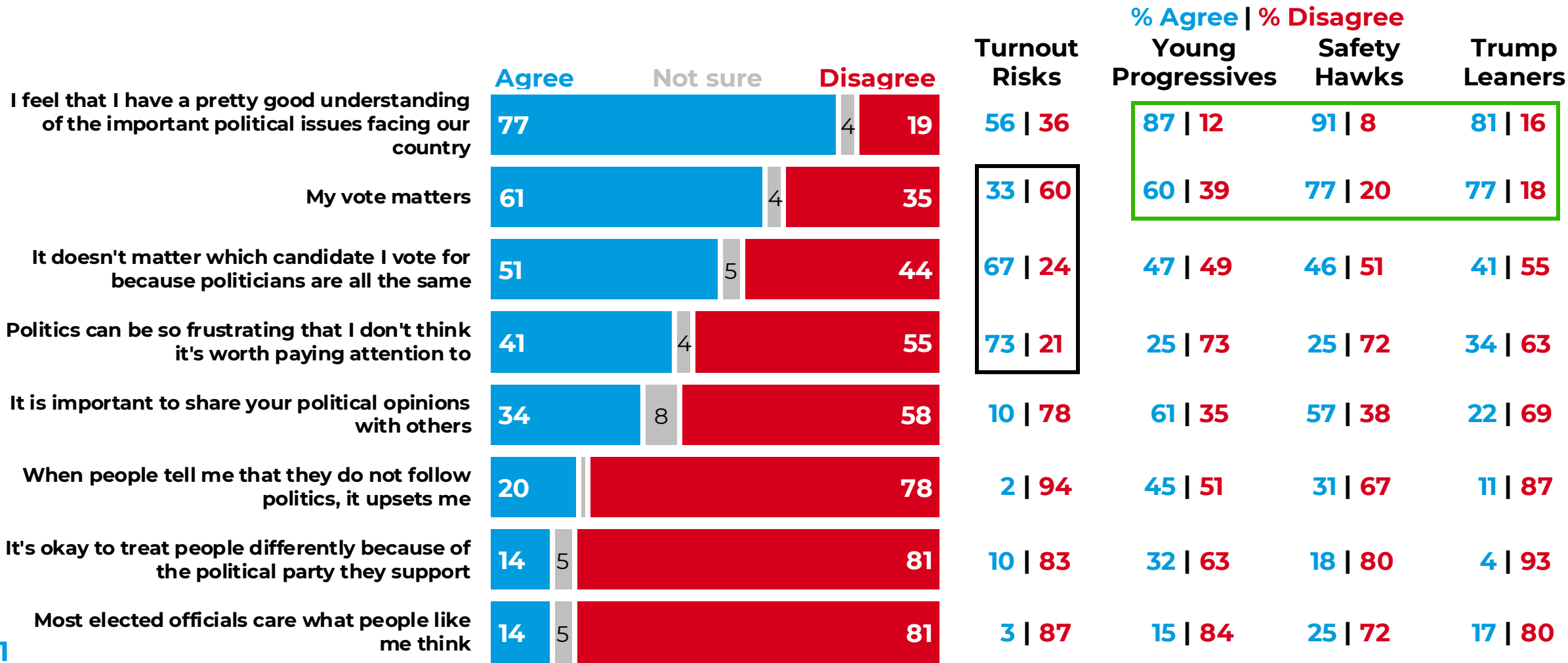


As we think about messaging for Double Haters, it could be that reflecting deep, thoughtful decision-making goes a long way in connecting to how these voters make decisions.



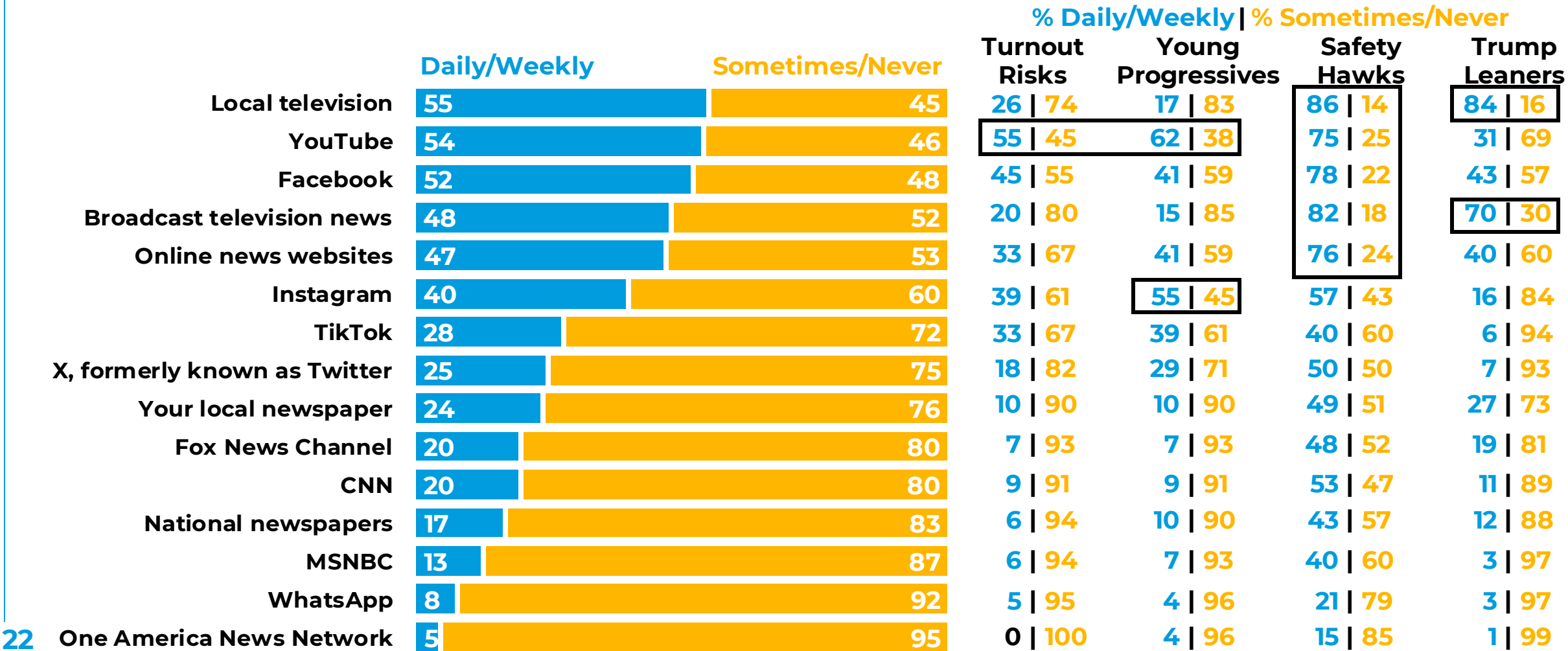
# Turnout Risks are disillusioned with politics and don't think their voice or vote matters much. Young Progressives, Safety Hawks, and Trump Leaners feel empowered to vote

Agree/Disagree Statements Related to Political Engagement and Attitudes



# Turnout Risks and Young Progressives are younger and more online, whereas Safety Hawks (who are more online than Trump Leaners) and Trump Leaners rely most on local TV and broadcast

Where Double Haters Get their News



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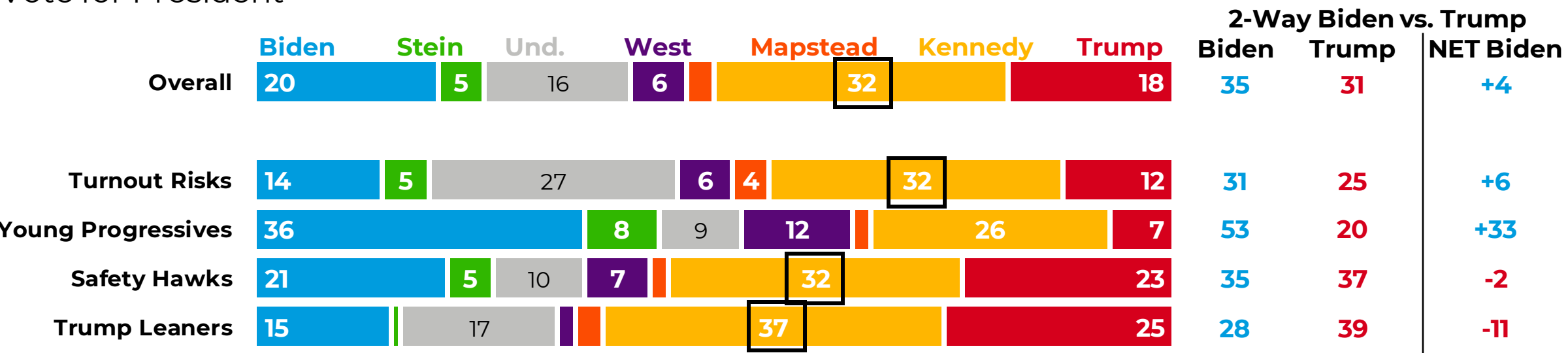
# **How Double Haters Feel About Biden and Trump**

# Double Haters don't want to vote for either Trump or Biden BUT Turnout Risks and Young Progressives are more open to Biden than Trump, vice-versa for Safety Hawks and Trump Leaners

Openness to Voting For Biden and Trump

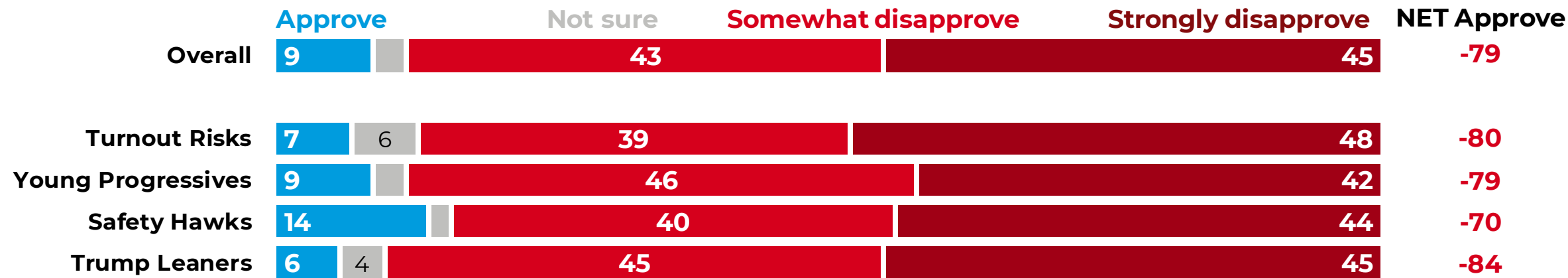


Vote for President

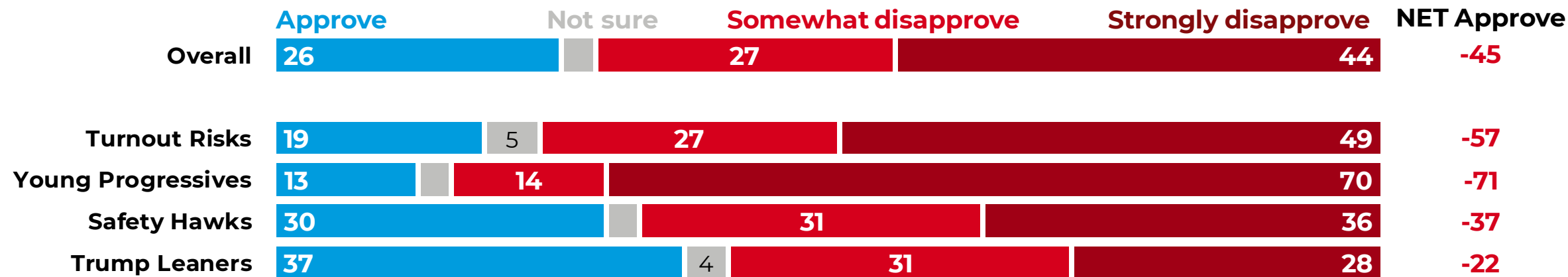


# Double Haters disapprove of both options, but they are more disapproving of Biden than Trump

## Joe Biden Job Approval

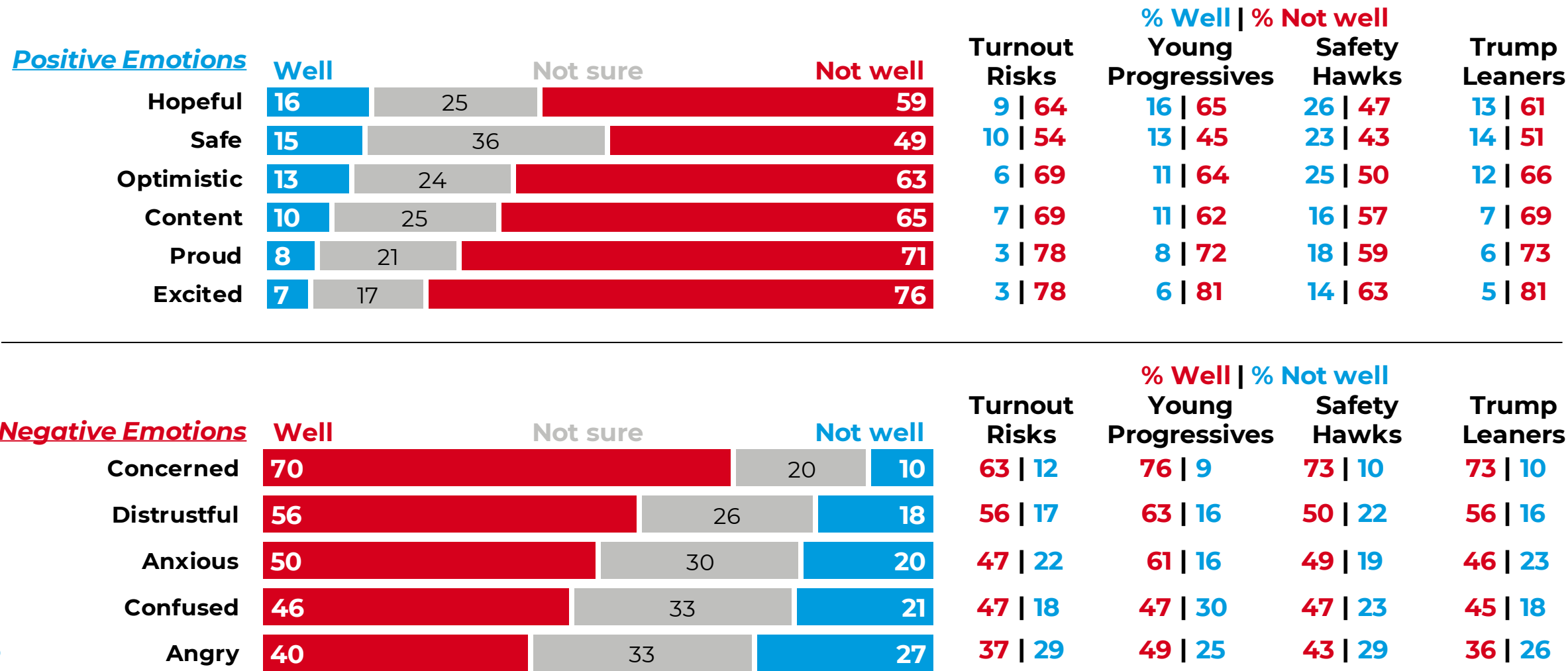


## Donald Trump Job Approval



# Even the Double Haters who are most likely to vote for Biden feel more concerned, distrustful, and anxious than anything positive about his time in office

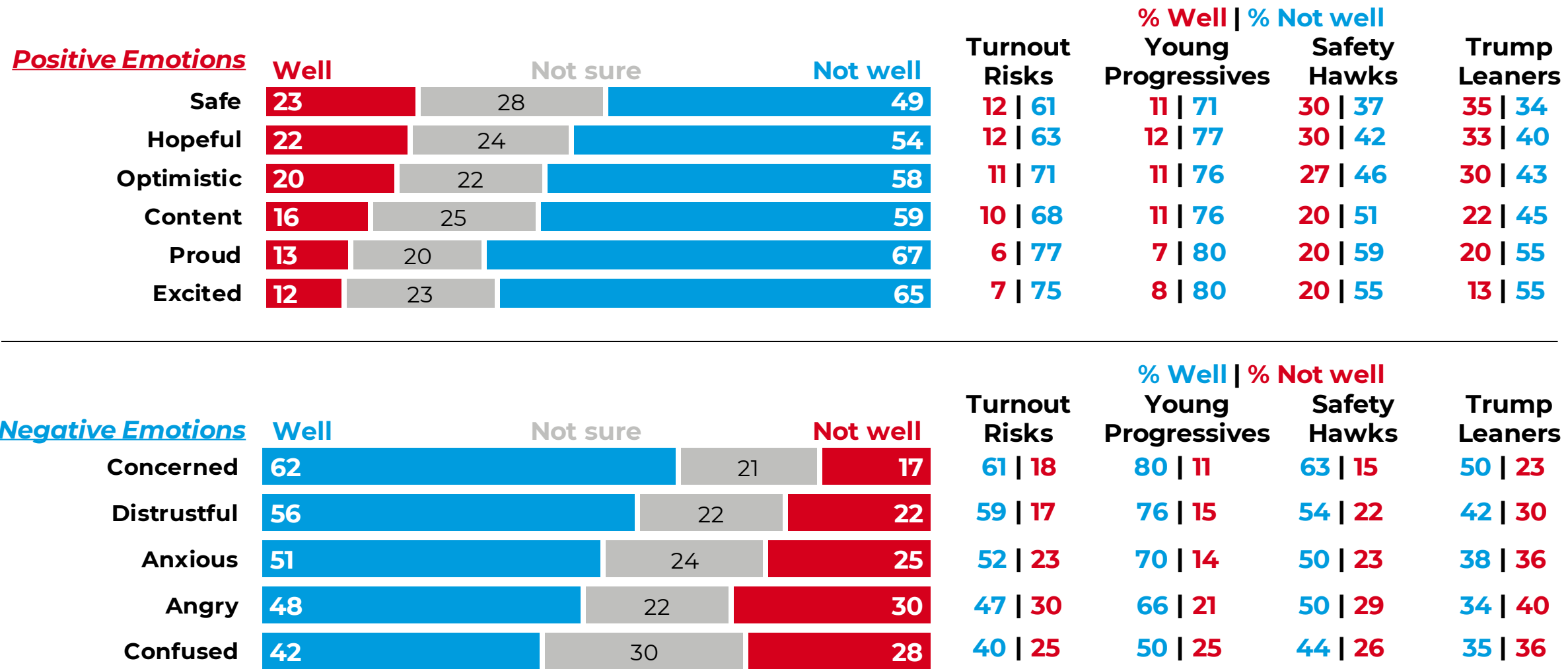
How well does each one describe how you have felt about Joe Biden's time as president?





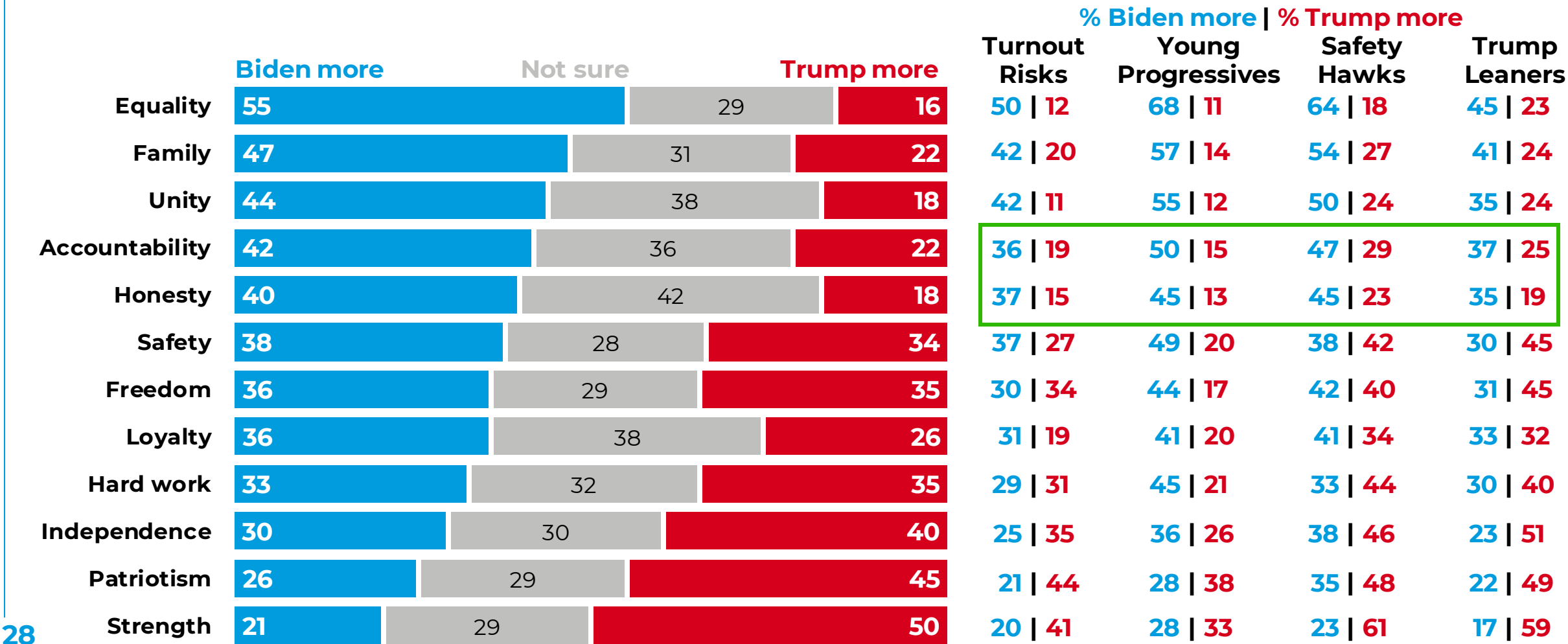
# The Double Haters most likely to vote Trump feel better about his time in office, with many feeling safe and hopeful, though they still felt concerned and distrustful.

How well does each one describe how you have felt about Donald Trump's time as president?



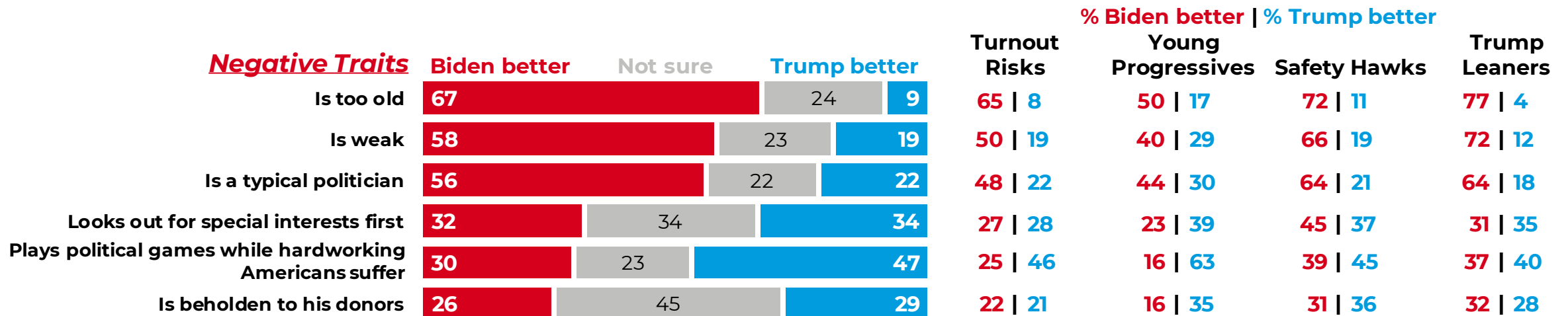
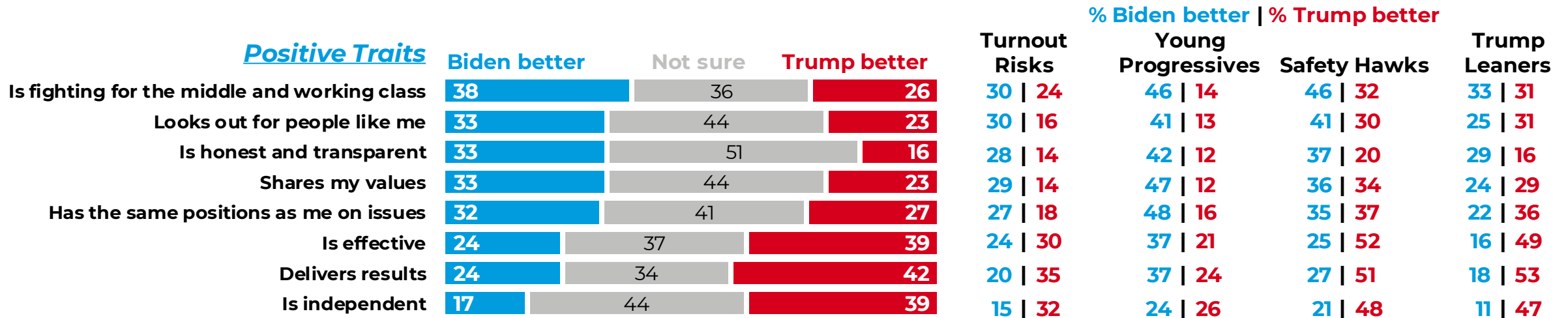
# Biden is given credit for progressive values like equality, and he's seen as more committed to family, honesty and accountability. But Trump has the upper hand on safety and freedom

Please indicate whether you think Joe Biden or Donald Trump embodies each value more.



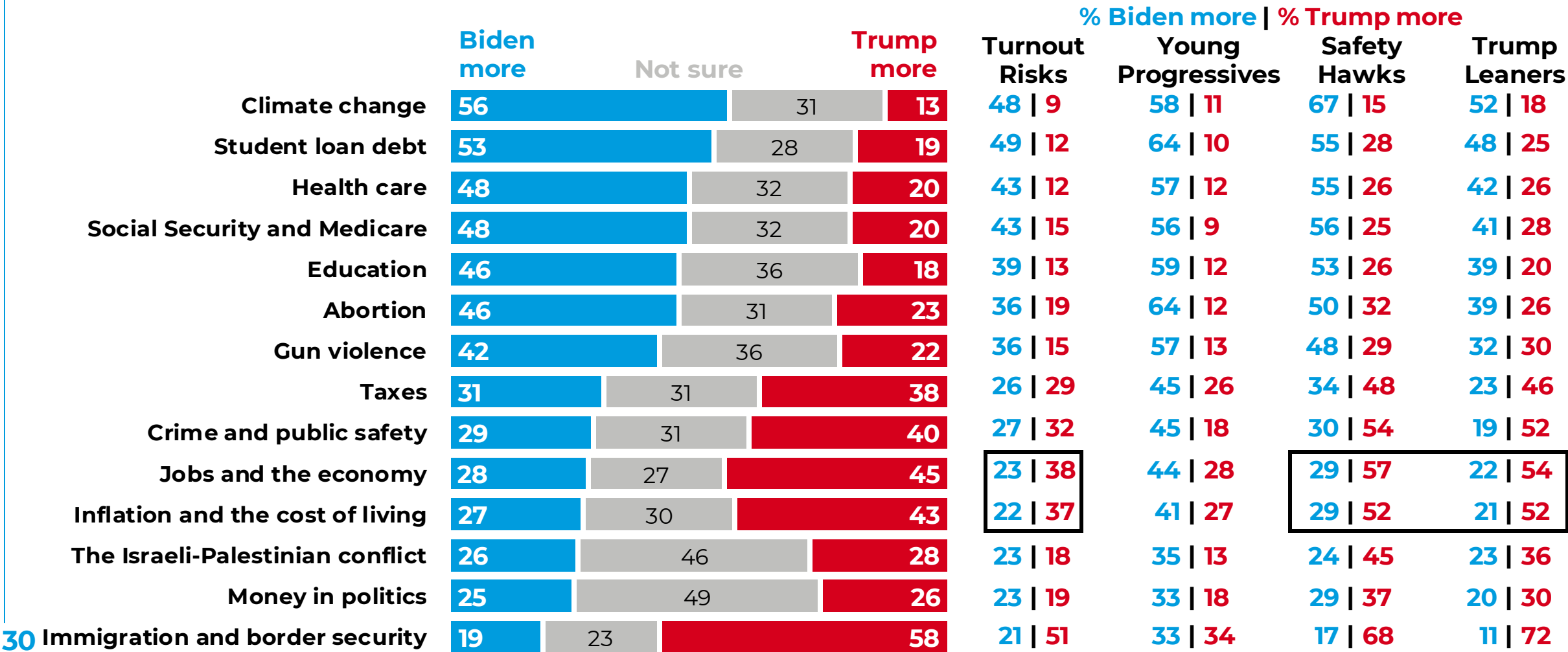
# Double Haters give Biden credit for fighting for the middle and working class and being honest, but even Turnout Risks and Young Progressives worry he is too old and weak

Please indicate whether each trait describes Joe Biden or Donald Trump better.



# And when it comes to the issues that matter most to voters, Trump has the upper hand on jobs and the economy, and inflation, except among Young Progressives

Please indicate whether you trust Joe Biden or Donald Trump more to address each issue.



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# Looking Ahead

# We now have a clear understanding of how the groups of Double Haters differ from each other

	Turnout Risks	Young Progressives	Safety Hawks	Trump Leaners
Gender	Majority women	Majority women	Majority men	Majority women
Age	Majority 18-44	Majority 18-44 (plurality 18-29)	Majority 30-54	Majority 55+ (plurality 65+)
Race/Ethnicity	Majority white	Majority white	Majority white BUT only narrowly so and most likely group to be Black or Latino	Majority white
Vote History	Plurality didn't vote in 2020	Biden 2020 voter	Biden 2020 voter	Trump 2020 voter
2024 Presidential Vote	Favor RFK Jr. in multi-candidate Lean Biden in 2-way	Vote for Biden in both multi-candidate and 2-way	Favor RFK Jr. in multi-candidate Split nearly evenly in 2-way	Favor RFK Jr. in multi-candidate Favor Trump in 2-way
Top Issues	Inflation and cost of living	Inflation and cost of living, Health care	Inflation and cost of living, Jobs and economy, Crime and public safety	Inflation and cost of living
Top Values	Honesty, Freedom, Accountability	Honesty, Equality, Accountability	Freedom, Honesty, Safety, Accountability	Honesty, Family, Freedom, Safety



## Next, there are several questions we want to answer about them, including:

- Why are they unfavorable to both Trump and Biden?
  - For those unfavorable toward Trump but still likely to vote for him, what if anything would be disqualifying?
  - And for those who are torn, how can we disqualify Trump for them? Or make Biden more attractive?
- How do we soothe on the negative feelings Double Haters feel for Biden's time in office to get them comfortable with voting for him?
  - Or do we even have to do that? Should we instead amplify the negative feelings voters have for Trump's time in office to disqualify him?
- Which of these groups are most movable? (We already have an idea based on the data here, but we should observe movement after exposure to stimuli in a survey)
- What is our message to motivate Turnout Risks to come out and vote?
- What is our persuasion message for Safety Hawks to ensure they vote for Biden rather than RFK Jr. or Trump?
- How much communication do Young Progressives need to shore up their support for Biden?
- Do we run the risk of potentially activating the Trump Leaners more?
- Is there an opportunity to move Trump Leaners away from Trump by potentially elevating RFK Jr. and positioning him as an alternative for this group?

# Thank You

New York

Washington, DC

Hartford

Chicago

Denver

Seattle