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FROM: Whit Ayres, Jon McHenry, and Dan Judy
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RE: Highlights of GOP Presidential Primary Survey

In the wake of a disappointing Republican performance in the 2022 midterm elections, Donald Trump has slipped to his lowest point since he emerged on the political scene almost eight years ago. He remains a formidable force, to be sure, with a lock on approximately 30 percent of likely Republican primary and caucus voters nationally. But a majority of the GOP is ready to move on, believing either that Trump cannot win in 2024, or that he is too focused on the past rather than the future.

Those are the key findings of a national online survey of 1000 likely Republican primary and caucus voters conducted January 16-21, 2023, by North Star Opinion Research. The sample reflects today's Republican Party. It is overwhelmingly white--93 percent--with 3 percent Hispanic, 2 percent Asian, 1 percent Black, and 1 percent other. Because of Trump's effect on GOP primary turnout, there are substantially more non-college voters--57 percent--than college graduates--43 percent. Thirty-eight percent say they are evangelical Christians. Fifty-three percent say they are strong Republicans, 30 percent not-so-strong Republicans, and the remainder are independents, most of whom lean toward the Republican Party. Sixty-three percent support the GOP more than Trump, 26 percent support Trump more than the GOP, and 12 percent say they support both equally. Eighty-five percent of these people voted for Trump in 2020, 7 percent voted for Biden, 3 percent for a third-party candidate, and 5 percent either did not vote or wouldn't say. All respondents say they are likely to vote in their state's Republican primary or caucus for President in 2024.

Highlights of the survey findings are:

- 1. Florida Governor Ron DeSantis holds a substantial lead over Donald Trump on three different ballot tests, with Trump locked in between 28 and 30 percent on all three.** On a two-way ballot between the two, DeSantis leads Trump 52 to 30 percent, with 15 percent undecided and 3 percent saying they would not vote if those were the only two options. On a three-way ballot test with DeSantis, Trump, and "another candidate," DeSantis has 44 percent, Trump 28 percent, "another candidate" 10 percent, with 17 percent undecided. On a ten-way ballot, DeSantis has 39 percent, Trump 28 percent, Mike Pence has 9 percent, Nikki Haley and Liz Cheney 4 percent each, and five other candidates are at 1 percent, with 13 percent undecided.

2. **For respondents who say they support the GOP more than Trump, Mike Pence has overtaken Trump, moving into second place on the 10-way ballot.** Among these voters, DeSantis has 48 percent, Pence 13 percent, and Trump 9 percent, with the remaining candidates at 5 percent or less.

3. **The 28 percent of Republican primary voters who are locked in for Trump would support him even if he ran as an independent against the Republican and Democratic nominees in a general election.** On a general election ballot test with DeSantis and Joe Biden, DeSantis would take 56 percent, Trump 28 percent, Biden 5 percent, with the remainder undecided or not voting. Voters who support Trump more than the GOP overwhelmingly stick with him as an independent candidate, with 69 percent supporting Trump and 24 percent supporting DeSantis. In this scenario, 2024 would be a replay of the 1912 Presidential election, with former Republican President Teddy Roosevelt running as the Bull Moose Party candidate against Republican nominee William Howard Taft and Democratic nominee Woodrow Wilson, splitting the Republican vote and ensuring that the Democrat Wilson would win the election.

4. **When given a choice of three different statements about a Trump candidacy in 2024, a majority of Republican primary voters say they want a different candidate, either because they think Trump cannot win, or because they think he is too focused on the past rather than the future.** The survey used a split-sample format to test two different sets of statements.

Split-Sample A

Donald Trump is the best candidate Republicans can nominate in 2024.	35%
I supported Donald Trump when he was President, but I don't think he can win the Presidency in 2024, and I want a different nominee who can win.	52%
I did not support Donald Trump when he was President, and I do not want him to be the Republican nominee in 2024.	13%

Split-Sample B

Donald Trump is the best candidate Republicans can nominate in 2024.	35%
I supported Donald Trump when he was President, but he now seems focused on the past, and I want a nominee who is focused on the future.	57%
I did not support Donald Trump when he was President, and I do not want him to be the Republican nominee in 2024.	9%

5. **When asked in an open-ended format what concerns them most about a Trump candidacy in 2024, dominant answers refer to “his mouth,” “his behavior,” “his baggage,” and “his age.”** Resistance to a Trump candidacy in 2024 is centered not on his policy positions or on his record as President, but on his personal characteristics.

Conclusion

The Republican Presidential contest in 2024 is wide open. Donald Trump remains a significant force, but far from the overwhelming favorite. With a lock on about 30 percent of the Republican electorate, his best scenario is a large field of candidates splitting the two-thirds of the Republican electorate who are looking for another alternative. But if that two-thirds coalesces around one or two alternatives, Trump will have a significant challenge winning the Republican nomination again.

Methodology and Sample

This national survey of 1000 registered voters was conducted January 16-21, 2023. Interviews were conducted online by Dynata, using their voter-matched panel. All respondents confirmed that they are registered to vote and are likely to vote in the 2024 Republican Presidential primary or caucus. Quotas were set for state, gender, age, and education to reflect past turnout.

The margin of error for the full sample, with respondents splitting 50 percent for one response and 50 percent for another response is plus-or-minus 3.10 percent. The margin of error increases for smaller subgroups within the sample. For example, the margin of error is plus-or-minus 4.38 percent for subgroups of 500 and 9.80 percent for subgroups of 100.