



To: Interested Parties
From: Michael Palmer, AFPA Senior Advisor
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Subject: Nikki Haley is the Stronger GOP Primary and General Election Candidate

Haley has shown sustained momentum in recent months

Right now, in the GOP Primary, the most meaningful polling is in Iowa and New Hampshire. These are the states where the candidates and their staff are on the ground, where the vast majority of the ad spending is occurring, and where the media is focused.

They are also the states where primary voters are beginning to make up their minds and learn about candidates other than Donald Trump. In fact, 80% of voters in Iowa and New Hampshire say the primary is just beginning or is about halfway through. Contrast this with later contests like South Carolina or the Super Tuesday states, where virtually all the voters say the race hasn't begun or is just beginning.

Right now, polling from states other than Iowa and New Hampshire shows President Trump with a significant lead, similar to national polls where Haley and DeSantis are in the teens. This is because primary voters have a well-baked opinion of President Trump from his time in office (juxtaposed with their current view of the country under Joe Biden) but have little to no knowledge of alternative candidates. This will change with momentum coming out of the early states and the voters beginning to evaluate their choices. But for right now, we need to look to Iowa and New Hampshire to understand what's going on.

In these states, a clear trend can be seen in terms of growing support for Haley and shrinking support for DeSantis amongst GOP primary and caucus-goers, with Haley growing from single digits in early August to now being in second place. In contrast, in this same time period, DeSantis has been static or shrinking.

Iowa

	Trump	Haley	DeSantis
November	44%	17%	16%
October	42%	13%	15%
September	44%	11%	17%
Late August	44%	10%	14%
Early August	40%	6%	17%

New Hampshire

	Trump	Haley	DeSantis
November	40%	25%	9%
October	42%	20%	11%
September	39%	19%	10%
Late August	41%	12%	10%
Early August	36%	6%	13%

To go back even further, just as a point of reference, in early February, in Iowa, DeSantis was tied in the polls with Trump (DeSantis at 35%, Trump at 37%), and in New Hampshire, they were both tied at 31%. So, an even steeper decline when you look at the whole year.

Haley is more viable amongst GOP Primary voters to take on Trump

In looking below the topline numbers at the second choice for voters, a plurality of DeSantis voters say they would support Haley as their second choice while DeSantis does not get that level of support from Haley voters.

- In NH, 34% of DeSantis’s supporters go to Haley, 29% to Trump. For Haley’s supporters, only 24% go to DeSantis.
- In IA it’s more evenly split, with, 38% of DeSantis’s support going to Haley and 35% to Trump.

It should be noted that this is a significant change from a month ago when in Iowa, only 27% of DeSantis voters went to Haley, and in New Hampshire, only 26%.

In terms of image, Haley is the most “likable” candidate. Overall, Haley has the lowest unfavorable numbers of any candidate. In New Hampshire, 32% of voters think of her unfavorably compared to 45% for DeSantis and 42% for Trump. It’s closer in Iowa, with Trump and DeSantis having a 30% unfavorable rating and Haley at 28%.

In terms of favorability between the candidates, more of DeSantis’s voters have a favorable image of Haley than the other way around.

- In NH, 36% of Haley supporters have a favorable impression of DeSantis. However, 54% of DeSantis voters have a favorable impression of Haley.
- In IA, only 47% of Haley supporters have a favorable impression of DeSantis, whereas 65% of DeSantis supporters have a favorable image of Haley.
- In addition, 44% of Trump voters in NH and 47% in IA have a favorable impression of Haley, suggesting significant potential for Haley to attract support from diverse voter bases.

In addition, Haley has more room to make her case to primary voters as she is less defined than Trump or DeSantis. The below numbers are from the question “how much do you know and understand the policy positions” of a named candidate and they are averaged across Iowa and New Hampshire.

	A lot	A little / None
Donald Trump	80%	20%
Ron DeSantis	50%	50%
Vivek Ramaswamy	32%	68%
Nikki Haley	41%	59%
Chris Christie	27%	73%
Tim Scott	27%	73%

Because Haley is less defined than DeSantis and certainly Trump, she has an opportunity to paint her narrative on a blank slate vs change people’s negative impression of an existing narrative.

Haley is the strongest General Election candidate

GOP primary voters, particularly in the early states, don’t just want a candidate to win Iowa or New Hampshire; they want a candidate who can get to the Oval Office. In public and private

general election polling, nationally and in the Presidential swing states, Haley consistently performs the best against Joe Biden compared to Trump or DeSantis.

Internally, we have seen the general election race tightening in the Biden vs Trump matchup in the last two months, but not to the extent that public polls have shown.

Many recent public polls, mostly at the national level but some in specific swing states, have Trump tied or beating Biden. In our daily tracking and recent general election polls in AZ, NV, PA, MI, and WI, we consistently show that Biden beats Trump by 1 to 3 points. This is tighter than polls from September or earlier that showed Biden beating Trump by 6 plus points; however, in those same polls, DeSantis beat Biden by 2 to 4 points, and Haley beat Biden by 6 to 11 points, depending on the swing state. Even in the public polls that show Trump tied or winning, the same pattern emerges of DeSantis doing better than Trump and Haley doing the best.

This could certainly change as these polls are a year out from actual decision time, but the trend and patterns are clear that Haley would be the strongest general election candidate to beat Joe Biden and turn the page to a new generation. In addition, while it needs to play out in the general election campaign, Haley's profile and policy positions have the potential to attract a new coalition of voters that the other candidates could not.

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