A Lay of the Land and Buildup to 2016

September 16, 2015

Celinda Lake
clake@lakeresearch.com

Follow on Twitter & Facebook:

Twitter: @CelindaLake
Facebook: www.facebook.com/celinda.lake
National Mood & Top Issues According to Voters
While Americans are not as anxious as they were several years ago, they still remain far from satisfied about the country’s course, and have not been for a good portion of the last decade. The right-track/wrong-track question is often a reflection of the state of the economy. While perceptions of the economic recovery have ticked up in the last few years, it hasn’t been a surge. Most Americans say the economy is in only fair or poor shape.

While economic issues dominate the agenda, concerns over foreign threats are growing compared to recent years.

**Chart:**

- Jobs: 14%
- The economy: 23%
- Health care: 10%
- Illegal immigration: 8%
- Foreign threats: 12%
- Social Security: 4%
- Taxes: 3%
- The deficit: 8%

Source: The Battleground Poll; The Terrance Group, Lake Research, George Washington University
While Americans are more confident in the ability of Republicans to handle the economy, they are more confident in Democrats when it comes to producing jobs. They are also more confident in Democrats in Foreign Affairs.

Now, thinking about issues facing this country… I am going to read you a list of issues. Please listen as I read the list and tell me, for each one, whether you have more confidence in -- the Republican Party, or the Democratic Party to deal with this issue.

<table>
<thead>
<tr>
<th>Issue</th>
<th>GOP Party</th>
<th>DEM Party</th>
<th>Both</th>
<th>Neither</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>The economy</td>
<td>49%</td>
<td>44%</td>
<td>1%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Taxes</td>
<td>47%</td>
<td>44%</td>
<td>1%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Health care</td>
<td>39%</td>
<td>52%</td>
<td>3%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Jobs</td>
<td>42%</td>
<td>49%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Foreign affairs</td>
<td>50%</td>
<td>40%</td>
<td>1%</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: The Battleground Poll; The Terrance Group, Lake Research, George Washington University
The Rising American Electorate

Changes in America’s demographics had a dramatic influence in 2012 and 2014 and hold greater implications for the 2016 elections. The Rising American Electorate needs to be invited to participate more fully in civic processes through registration and voter education programs.
Looking back on 2014, Democrats continues to perform well among the Rising American Electorate, however, their performance fell off substantially from their showing in 2012. Earning back the support of these groups is crucial for Democrats’ electoral victory in 2016. All but Hispanics voted less Democratic than they had in 2010.

CNN National Exit Poll; data for unmarried women from 2010 LRP Omnibus
Vote eligible Latinos and Asian Americans are expected to have the fastest growth from 2012 to 2016. Latinos and unmarried women will see the largest growth in terms of number of voters added.

### CPS Estimates of the Vote Eligible Population

<table>
<thead>
<tr>
<th>Category</th>
<th>2012</th>
<th>2016*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RAE</strong></td>
<td>116,839,304</td>
<td>133,154,682</td>
</tr>
<tr>
<td>Unmarried Women</td>
<td>55,151,532</td>
<td>58,904,783</td>
</tr>
<tr>
<td>African Americans</td>
<td>26,914,854</td>
<td>28,975,337</td>
</tr>
<tr>
<td>Latinos</td>
<td>23,328,876</td>
<td>27,395,471</td>
</tr>
<tr>
<td>18-34 Year Olds**</td>
<td>63,008,477</td>
<td>66,063,167</td>
</tr>
<tr>
<td>Married Women (Not just in the RAE)</td>
<td>56,907,899</td>
<td>58,346,915</td>
</tr>
<tr>
<td>Asian Americans</td>
<td>8,253,663</td>
<td>10,509,210</td>
</tr>
</tbody>
</table>

* Projected: Uses a rolling average of monthly CPS data to estimate the linear trend in population growth and use that to extrapolate from the current population size. This is intended to be an approximation of likely population growth.

** These RAE/age projections use the RAE definition of 18-34 year olds rather than Millennials, which change year on year. They assume a standard age group of 18-34 year olds for each year.
Race for the Democratic Presidential Nomination
Bernie Sanders has jumped out to a nine-point lead over front-runner Hillary Clinton in New Hampshire, and he's gained ground on her among Iowa voters in the Democratic presidential race. While not an announced candidate, Vice president Biden is also enjoying a upswing in support.

Source: A September NBC News/Marist poll of 966 registered voters
Hillary Clinton has lost significant ground over the past two months, as she has struggled to manage the controversy over her use of a private e-mail server while Secretary of State. She still leads the field of Democrats, but for the first time her support has dropped below 50 percent, with the biggest decline coming from Women.

Percentage supporting Hillary Rodham Clinton if primary/caucus were held today (among Democratic-leaning registered voters).

Source: September 4-8, 2015 CNN ORC poll of 1012 adult Americans/Washington Post – ABC News Poll of 1,003 adults
While Hillary Clinton is certainly going through a low point in her campaign, and the challenge posed to her by Bernie Sanders – and potentially Vice President Biden – are very real, she is still a very formidable candidate in what is still a very early campaign season. Furthermore, she is still ahead of many of her potential rivals in the Republican field.

<table>
<thead>
<tr>
<th>Compare</th>
<th>Clinton vs. Trump</th>
<th>Clinton vs. Bush</th>
<th>Clinton vs. Carson</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Clinton +2.8</td>
<td>Clinton +1.2</td>
<td>Clinton +1.6</td>
</tr>
</tbody>
</table>

Source: Real Clear Politics aggregates of polls
Celinda Lake
Clake@lakeresearch.com
Washington, DC | Berkeley, CA | New York, NY
LakeResearch.com
202.776.9066

Celinda Lake
Clake@lakeresearch.com