September Board Meeting

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Beyond the Horserace: Some Key Demographic Groups in 2016

- **White, Working Class**: non-college educated households still struggling; suffering from the *unaffordability* of middle class life.

- **“Older Young” Voters**: those 25-32 year olds, concerned with *financial independence* – starting careers & families, buying first homes, continuing education or paying for it.

- **Independents**: disgusted with politics and its adjuncts (lobbyists, consultants, donors). Late in the game deciders who send a message by splitting their ticket or staying home.

- **First Generation American Hispanic and Asians**: *not single-issue voters* on immigration; education, economic mobility, and assimilation are priorities.

- **Suburban Women**: a/k/a Security Moms (and non-moms) worried about foreign affairs. Economically secure; not sold on Obamacare or Common Core. Passively pro-choice; *Planned Parenthood videos* may be a game-changer.
# A Changing Electorate

<table>
<thead>
<tr>
<th>Demographic</th>
<th>2004 % of the Electorate</th>
<th>2012 % of the Electorate</th>
<th>% △</th>
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</thead>
<tbody>
<tr>
<td>HISPANICS</td>
<td>8%</td>
<td>10%</td>
<td>+2%</td>
</tr>
<tr>
<td>ASIANS</td>
<td>2%</td>
<td>3%</td>
<td>+1%</td>
</tr>
<tr>
<td>WHITES</td>
<td>77%</td>
<td>72%</td>
<td>-5%</td>
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<tr>
<td>BLACKS</td>
<td>11%</td>
<td>13%</td>
<td>+2%</td>
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<tr>
<td>18-29</td>
<td>17%</td>
<td>19%</td>
<td>+2%</td>
</tr>
<tr>
<td>65+</td>
<td>24%</td>
<td>16%</td>
<td>-8%</td>
</tr>
<tr>
<td>SUBURBAN VOTERS</td>
<td>49%</td>
<td>47%</td>
<td>-2%</td>
</tr>
<tr>
<td>SINGLE VOTERS</td>
<td>37%</td>
<td>40%</td>
<td>+3%</td>
</tr>
<tr>
<td>INDEPENDENT VOTERS</td>
<td>26%</td>
<td>29%</td>
<td>+3%</td>
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Increase in Vote for Republicans from 2012-2014

- Women: 8%
- Hispanics: 12%
- Asians: 25%
- Unmarrieds: 12%
- Those without a high school education: 18%
- High school grads: 14%

Source: New York Times Exit Polls

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The “Middle” Is Getting Bigger

- Political affiliation decreasing – 42% declare themselves Independent.

*Party Identification, Yearly Averages, 1988-2013*

- % Republican
- % Independent
- % Democrat

Based on multiple day polls conducted by telephone

GALLUP
A Few of the Issues in Voter Focus

- **Republican Primary Voters**: illegal immigration, common core, economic growth and entrepreneurship, role of the US around the world, Obamacare, rule of law, fairness

- **Democratic Primary Voters**: social issues, climate change, pay and gender equity, selective disengagement globally, active government, equality

- **Jobs/economy** – voters view this in terms of everyday affordability and long-term financial security. The job is no longer enough.

- **Security/Foreign Policy** – ISIS/ISIL, Iran/Israel, Russia/Ukraine, China, Middle East. Are we losing our friends, emboldening our enemies?

- **Energy** – More here, less from over there. Cheaper fuel, more jobs & growth locally

- **Education** – More choice, charters and less Common Core v. more funding, teachers unions, standardized curriculum,
Down-Ballot Dynamics

- GOP had favorable map & disciplined candidates in 2014
- 2016 a much smoother path for Democrats.
- The Class of 2010 hail form purple/swing states.

<table>
<thead>
<tr>
<th>Republicans</th>
<th>State</th>
<th>Democrats</th>
<th>State</th>
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<tbody>
<tr>
<td>Rubio</td>
<td>Florida</td>
<td>Bennet</td>
<td>Colorado</td>
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<tr>
<td>Portman</td>
<td>Ohio</td>
<td>Blumenthal</td>
<td>Connecticut</td>
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<td>Ayotte</td>
<td>New Hampshire</td>
<td>Boxer</td>
<td>California</td>
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<td>Kirk</td>
<td>Illinois</td>
<td>Leahy</td>
<td>Vermont</td>
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<td>Toomey</td>
<td>Pennsylvania</td>
<td>Mikulski</td>
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<td>Johnson</td>
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<td>Murray</td>
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<td>Grassley</td>
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<td>Reid</td>
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<td>Schatz</td>
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<td>Schumer</td>
<td>New York</td>
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<td></td>
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<td>Wyden</td>
<td>Oregon</td>
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Electability is a Fiction; Electoral College is How You Win A Dozen States in Play
2016: Perhaps the Craziest (Political) Thing We’ve Ever Seen!

- A process of elimination nomination. Voters have plenty of time, plenty of choices, and seem to be enjoying the ride if not driving the train.

- Non-establishment outsiders receiving most traction from voters.
  - Trump (33%) and Carson (20%) lead in latest ABC/WashPo poll.
  - Carson is underrated as a candidate in political circles, but not for GOP voters.
  - Cruz unique as the experienced outsider.
  - Sanders continues to gain on Hillary, Warren could do the same.
  - Carly currying favor, slaying Goliath, impressing in debate
  - Establishment candidates trying to prove they are “electable”.

- The Trump Factor – has both hero and victim status among his supporters. Normal rules for a candidate do not apply to him. Teflon Don
Hillary 2.0 Seems More Like the “New Coke”

- US is a nation of second chances, but she is blowing hers...
  - Voters don’t trust her
  - Democrats don’t want her
  - Independents cannot relate to her
  - Women aren’t heeding the call:
    - 42% of Democrat-leaning voters say they are support Hillary.
    - 42% of Democratic-leaning female voters, down 29% in 8 weeks. (about equal with her support among men).
    - 37% of white Democratic women say they would vote for her.

#FeeltheBern: Sanders attracts crowds; beating her in some early states
Elizabeth Warren’s footsteps: does “no” mean “maybe”?
Biden his time: VP Joe could rankle the race
Hillary Unable to Capitalize on Basics

- The three positive attributes associated with female candidates do not seem to apply to Hillary Clinton (fresh & new, incorruptible, accessible/consensus-builder)

- Reluctance to leverage her greatest asset: the popular, two-term President, shrewd tactician to whom she is married

- An imperfect fit for: carrying forward the Obama-Biden legacy; a less centrist Democratic party; the growing anti-Wall Street, anti-corporatist populism movement
Challenges for Republicans in the 2016 Race

- The “Democratic blue wall”: Dem. electoral college advantages in states where GOP has governors and/or senators, but where POTUS victory has been elusive
- No dominant candidate as Commander-in-Chief
- Ground game & technology: much improved, still behind
- Perception as reality – false caricatures that stick
- The unexpected, currently immovable, say anything-go anywhere dynamic that is Donald Trump