



What Republicans Need to Know as We Move Toward the 2020 Election

PREPARED BY:

PUBLIC OPINION STRATEGIES

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A first step will be “unlearning” every concept you have of “likely voters” in the context of the 2020 campaign.

The demographic composition of the electorate will most closely resemble *all* registered voters, with a likely new record percentage of non-White voters.

Here is a stunning finding: Election interest already looks closer to an October of an election year than an off-year.

Interest in the Election

| Presidential Years | |
|--------------------|--------------|
| Date | Percent 9-10 |
| Mid-October 2016 | 72% |
| Mid-October 2012 | 77% |
| Mid-October 2008 | 87% |
| Mid-October 2004 | 82% |

| Presidential Off-Year | |
|-----------------------|--------------|
| Date | Percent 9-10 |
| May 2019 | 69% |

Even with this upcoming record turnout the Republican party, while *not* in great shape, is still in a competitive position.

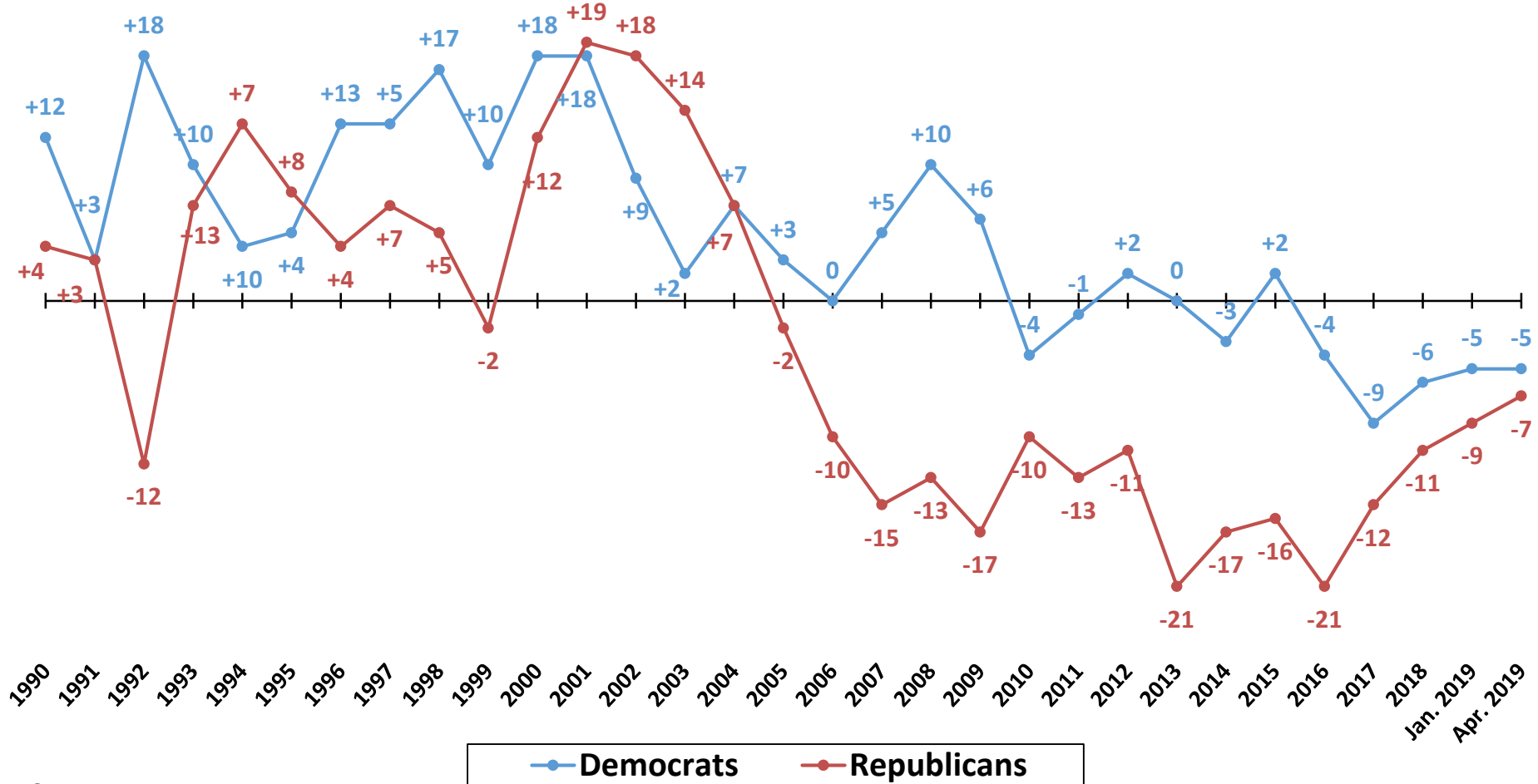
Republicans lost 40 House seats while only losing the actual vote in swing seats by roughly one percentage point.

2018 Election Popular Vote for U.S. Congress:*

| | Republican Votes | Democrat Votes | Net Difference |
|---|------------------|----------------|----------------|
| Total U.S. Vote | 44.8% | 53.4% | +8.6% |
| Cook Political Report Swing Districts (18%) | 48.7% | 49.9% | +1.2% |

Feelings toward the Republican and Democratic parties over time: Republicans are on an upswing.

(Yearly Average Differential: Positive-Negative)



Feelings toward the Republican and Democratic parties over time: Among Whites by party

Republican Party

| | Positive | Negative | <u>D/S</u> |
|------|----------|----------|------------|
| 2010 | 35% | 39% | -4% |
| 2012 | 40% | 39% | +1% |
| 2014 | 31% | 42% | -11% |
| 2016 | 36% | 41% | -5% |
| 2018 | 39% | 41% | -2% |
| 2019 | 42% | 38% | +4% |

Democratic Party

| | Positive | Negative | <u>D/S</u> |
|------|----------|----------|------------|
| 2010 | 31% | 49% | -18% |
| 2012 | 33% | 47% | -14% |
| 2014 | 31% | 47% | -16% |
| 2016 | 30% | 50% | -20% |
| 2018 | 31% | 47% | -16% |
| 2019 | 29% | 46% | -17% |

From our focus groups, Alexandria Ocasio-Cortez is becoming the defining image of today's Democratic party.



| | | | |
|---------------------------------|----------------|------------------|------------------|
| Alexandria Ocasio-Cortez | 779,957 | 4,162,201 | 3,438,205 |
| Speaker Nancy Pelosi | 671,944 | 2,519,643 | 553,908 |

Social media table from:

Pelosi and Ocasio-Cortez Image



| | | |
|-----|-----|-----|
| GOP | 4% | 80% |
| IND | 15% | 50% |
| DEM | 60% | 15% |

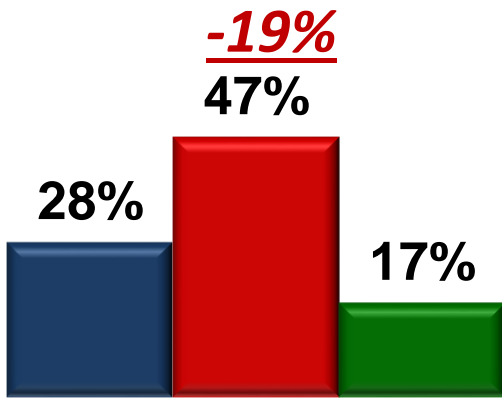


| | | |
|-----|-----|-----|
| GOP | 9% | 58% |
| IND | 23% | 27% |
| DEM | 48% | 9% |

*First track as Speaker

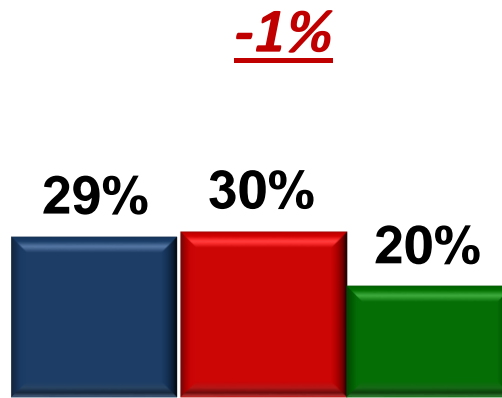


| | | |
|---------|-----|-----|
| GOP | 4% | 64% |
| IND | 14% | 29% |
| DEM | 46% | 9% |
| DEM PVs | 51% | 9% |



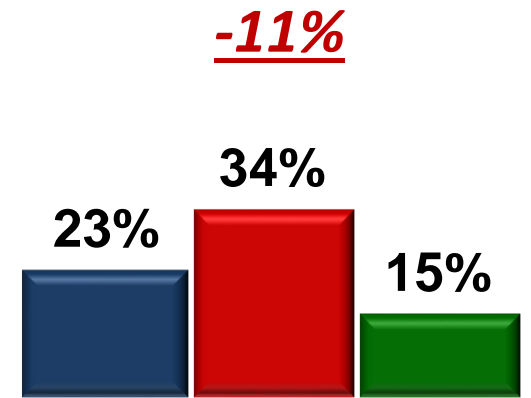
Nancy Pelosi
(January 2019)

Able to Rate: 92%



Nancy Pelosi
(April 2007)

Able to Rate: 79%



Alexandria Ocasio-Cortez
(March 2019)

Able to Rate: 72%

■ Positive ■ Negative ■ Neutral

It will *not* be getting easier—key numbers by generation are concerning.

Here is another gap between our party and younger voters: Climate change is their most important issue.

Data among the first wave of Generation Z voters is not favorable towards the GOP.

| 2018 NBC/WSJ Merge | Gen Z | Millen'al | Gen X | Boomers | Silent |
|--|-------------|-------------|------------|------------|-------------|
| % of registered voters | 3% | 24% | 33% | 25% | 7% |
| 2018 Cong Pref (GOP - Dem) | -28% | -18% | -2% | -3% | -13% |
| 2018 Trump Approval (App – Dis) | -27% | -23% | -2% | -2% | -9% |
| 2018 Recalled '16 Vote (DJT - HRC) | -16% | -13% | 3% | 0% | -6% |
| 2018 Party ID w/ Lean (GOP - Dem) | -23% | -13% | 1% | -2% | -11% |

Gender is an ever increasing problem: there was a new all-time record split between men and women in voting for Congress in 2018; a net 23-point difference.

Women voted Democrat for Congress by a record margin and by a record gap compared to men.

Exit Poll Congressional Preference by Gender

| | 2006 Margins | 2008 Margins | 2014 Margins | 2016 Margins | 2018 Margins |
|-------|--------------|--------------|--------------|--------------|--------------|
| Men | +3% | +6% | +16% | +12% | +4% |
| Women | +12% | +14% | +4% | +10% | +19% |

This is a net 23-point difference by gender.

The composition of the Republican party has shifted in a surprising way.

Our margins now rest on a very different group of less well educated voters.

The composition of the Republican party has shifted significantly over the decade to non-college Whites.

Self-Described Republicans by Ethnicity/Education

| | 2010 Merge | 2012 Merge | 2014 Merge | 2016 Merge | 2018 Merge |
|--|------------|------------|------------|------------|------------|
| Total Republican Non-College Whites | 50% | 48% | 49% | 56% | 59% |
| Total Republican College+ Whites | 40% | 40% | 38% | 33% | 29% |
| Republican Non-Whites | 10% | 12% | 13% | 11% | 12% |

Republicans lost all White college + voters by eight points in 2018.

Exit Polls by White/Education

| Year | Republican | Democrat | Net Difference |
|---------------------------------|------------|----------|----------------|
| <i>Whites College+</i> | | | |
| 2018 | 45% | 53% | +8% |
| 2016 | 54% | 44% | +10% |
| 2014 | 57% | 41% | +16% |
| 2010 | 58% | 39% | +19% |
| <i>Whites Less Than College</i> | | | |
| 2018 | 61% | 37% | +24% |
| 2016 | 66% | 31% | +35% |
| 2014 | 64% | 34% | +30% |
| 2010 | 63% | 33% | +30% |

The standard typology of liberal, moderate, and conservative is devolving.

There are stable differences between self-described “progressives” versus liberals—and good reasons not to allow Democrats to move to the use of the word “progressive.”

Self-Described Political Ideology

Progressive

10%

Liberal

17%

27%

Moderate

31%

Conservatives

29%

Libertarian

9%

38%

There's a reason Democrats prefer the term progressive.

**"Forward
thinking."**

**"Open
minded."**

Liberal

Progressive

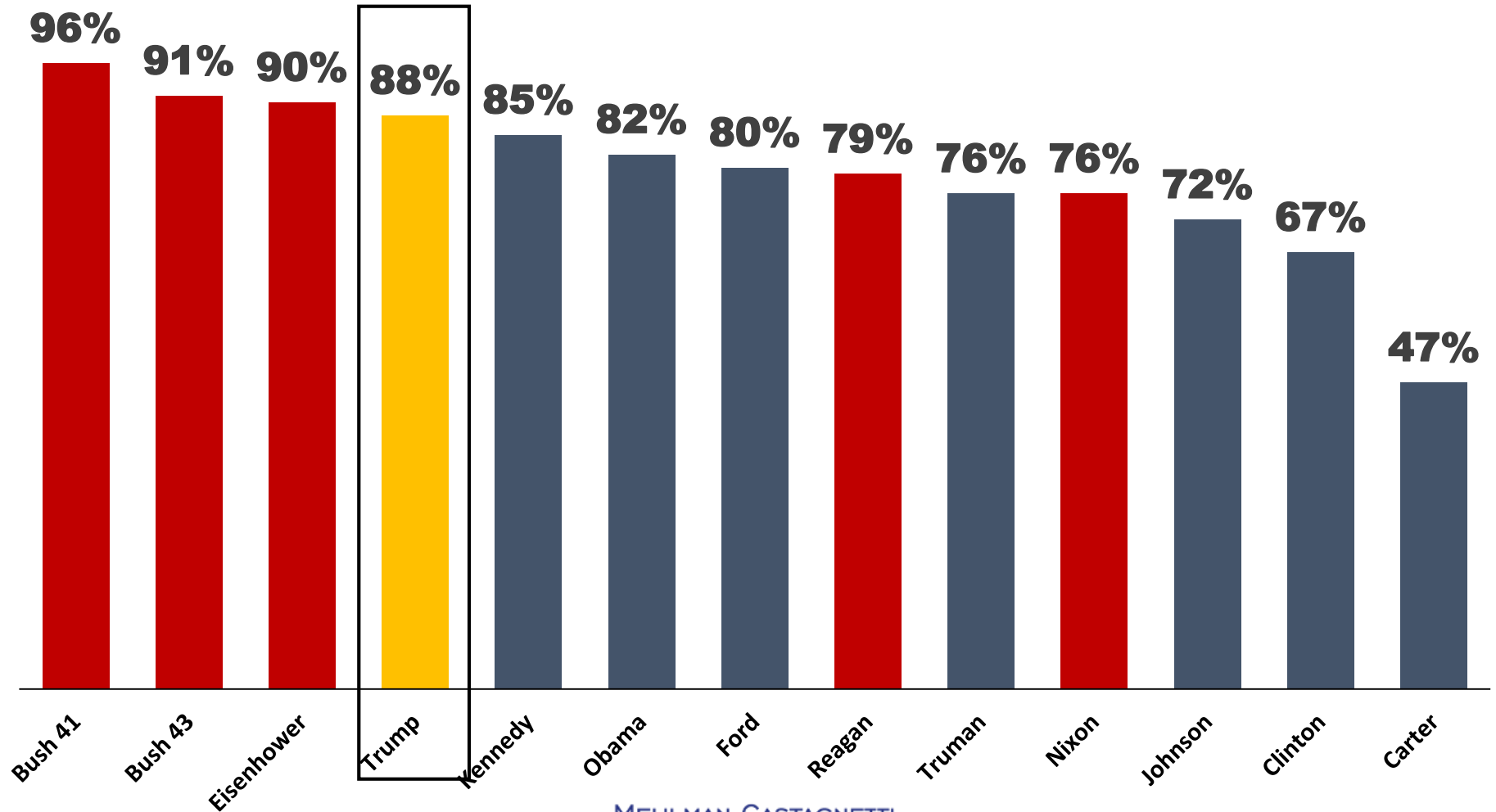
**"Push the
envelope."**

**"Ahead of
the curve."**

President Trump is an undervalued stock.

If the economy continues to be positive for another year without a major international event, Trump has core areas of strength he and the party can leverage.

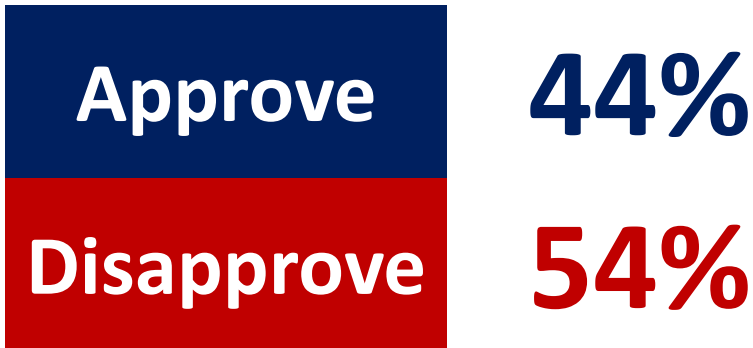
Two years plus into his presidency, Trump's approval rating among members of his own party exceeds that of any Democratic president among their own partisans.



Source: February 2019 NBC-WSJ Poll.

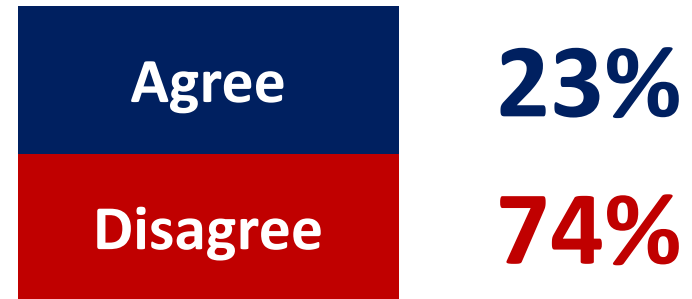
MEHLMAN CASTAGNETTI
— ROSEN & THOMAS —

There are some persuadable voters who could form the basis of a successful re-elect.

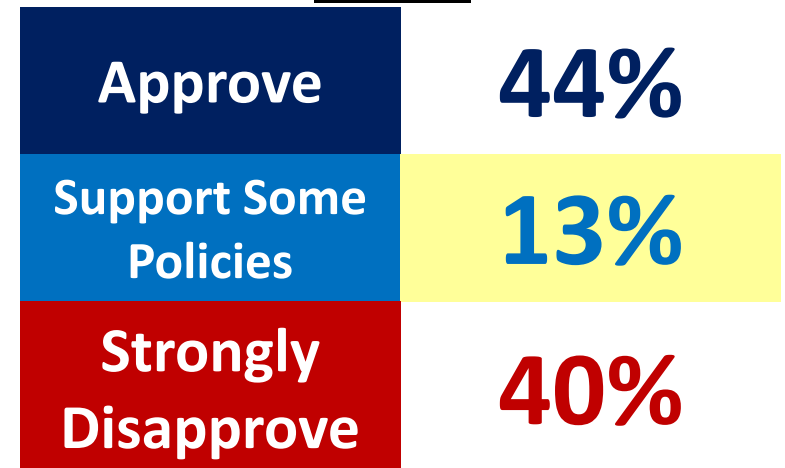


Agree/Disagree: Even though I don't approve of the job Trump is doing as President, I do support some of the policies he is supporting.

Among Those Who Disapprove...



Recalculated Among All Registered Voters...



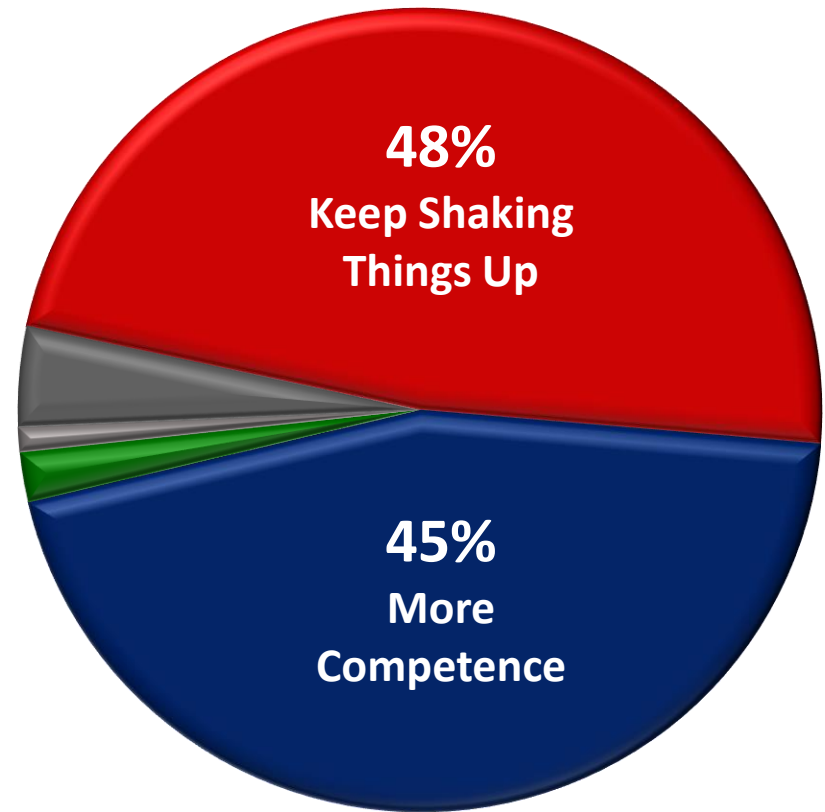
Views of the government in Washington, D.C. tells us people are still looking for major changes.

In general, which comes closer to your view of government in Washington, D.C....

We need to keep shaking things up and make major changes in the way government operates

Or...





We need more competence and a steady approach to the way government operates









Source: January 2019 NBC-WSJ Poll.

Democrat primary voters are currently “comparison shopping” and find any number of their candidates potentially appealing.

2020 Candidate Rating Among Democratic Primary Voters

| <i>Ranked by % Enthusiastic/Comfortable</i> | | Able to Rate | Enthusiastic/ Comfortable | Reservations/ Uncomfortable |
|---|------------------|--------------|------------------------------|--------------------------------|
|  | Joe Biden | 97% | 70% | 27% |
|  | Bernie Sanders | 98% | 62% | 36% |
|  | Elizabeth Warren | 90% | 57% | 33% |
|  | Kamala Harris | 79% | 52% | 27% |







2020 Candidate Rating Among Democratic Primary Voters

| <i>Ranked by % Enthusiastic/Comfortable</i> | | Able to Rate | Enthusiastic/ Comfortable | Reservations/ Uncomfortable |
|---|--------------------|--------------|------------------------------|--------------------------------|
|  | Beto O'Rourke | 77% | 48% | 29% |
|  | Pete Buttigieg | 57% | 44% | 13% |
|  | Cory Booker | 66% | 38% | 28% |
|  | Kirsten Gillibrand | 59% | 28% | 31% |
|  | Amy Klobuchar | 50% | 27% | 23% |
|  | Julián Castro | 51% | 22% | 29% |

Trump has his problems, but voters are already expressing concerns—sometimes major concerns—about the Democratic candidate options.

2020 Candidate Rating

Among All Voters

| <i>Ranked by % Enthusiastic/Comfortable</i> | | Able to Rate | Enthusiastic/ Comfortable | Reservations/ Uncomfortable |
|---|-------------------------|---------------------|--------------------------------------|--|
|  | Donald Trump | 100% | 41% | 59% |
|  | Joe Biden | 96% | 47% | 49% |
|  | Bernie Sanders | 95% | 37% | 58% |
|  | Kamala Harris | 66% | 25% | 41% |
|  | Beto O'Rourke | 64% | 23% | 41% |
|  | Elizabeth Warren | 83% | 30% | 53% |

The 2018 cycle also brought us the first consistent mentions about Democrat candidates being too “socialist.”

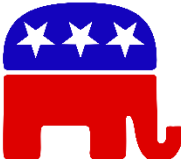


This thematic/debate is at the heart of the 2020 election.

Our firm has spent the past few months focusing on this topic of socialism and the 2020 election.

We can win this fight, but it will not be as easy as you think.

In what could portend the framing of the 2020 election, a first look at a response to a definition of “socialist.”

The country would be better off if our political and economic systems were more socialist, including taxing the wealthy more to pay for social programs, nationalizing health care so that it's government-run, and re-distributing wealth.

| | Agree | Disagree |
|---|-------|----------|
| Total | 45% | 51% |
|  | 14% | 83% |
|  | 37% | 56% |
|  | 77% | 19% |

Younger voters are more embracing of this description of socialist policies.

The country would be better off if our political and economic systems were more socialist, including taxing the wealthy more to pay for social programs, nationalizing health care so that it's government-run, and re-distributing wealth.

| | Agree | Disagree |
|-------|-------|----------|
| Total | 45% | 51% |
| 18-34 | 55% | 38% |
| 35-64 | 42% | 55% |
| 65+ | 39% | 58% |

Opposition to socialist policies have a crucial advantage for us among key demographic sub-groups.

The country would be better off if our political and economic systems were more socialist, including taxing the wealthy more to pay for social programs, nationalizing health care so that it's government-run, and re-distributing wealth.

| | Agree | Disagree |
|------------------------------|-------|----------|
| Total | 45% | 51% |
| White Suburban Women | 40% | 57% |
| All Suburban Voters | 41% | 56% |
| Key 2020 Presidential States | 42% | 54% |

The Democrat party slide towards socialist policy positions opens up opportunities:

- ✓ It highlights and focuses on a new and unpopular face of the Democrat party—Alexandria Ocasio-Cortez.**
- ✓ Swing voters understand “free is not free” as a powerful way to capture the Democrat agenda.**
- ✓ It reinforces the concerns our voters have about a culture that embraces entitlement over hard work. America was not built on participation trophies.**



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**PUBLIC OPINION STRATEGIES
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Office: (703) 836-7655

Website: www.pos.org