



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.

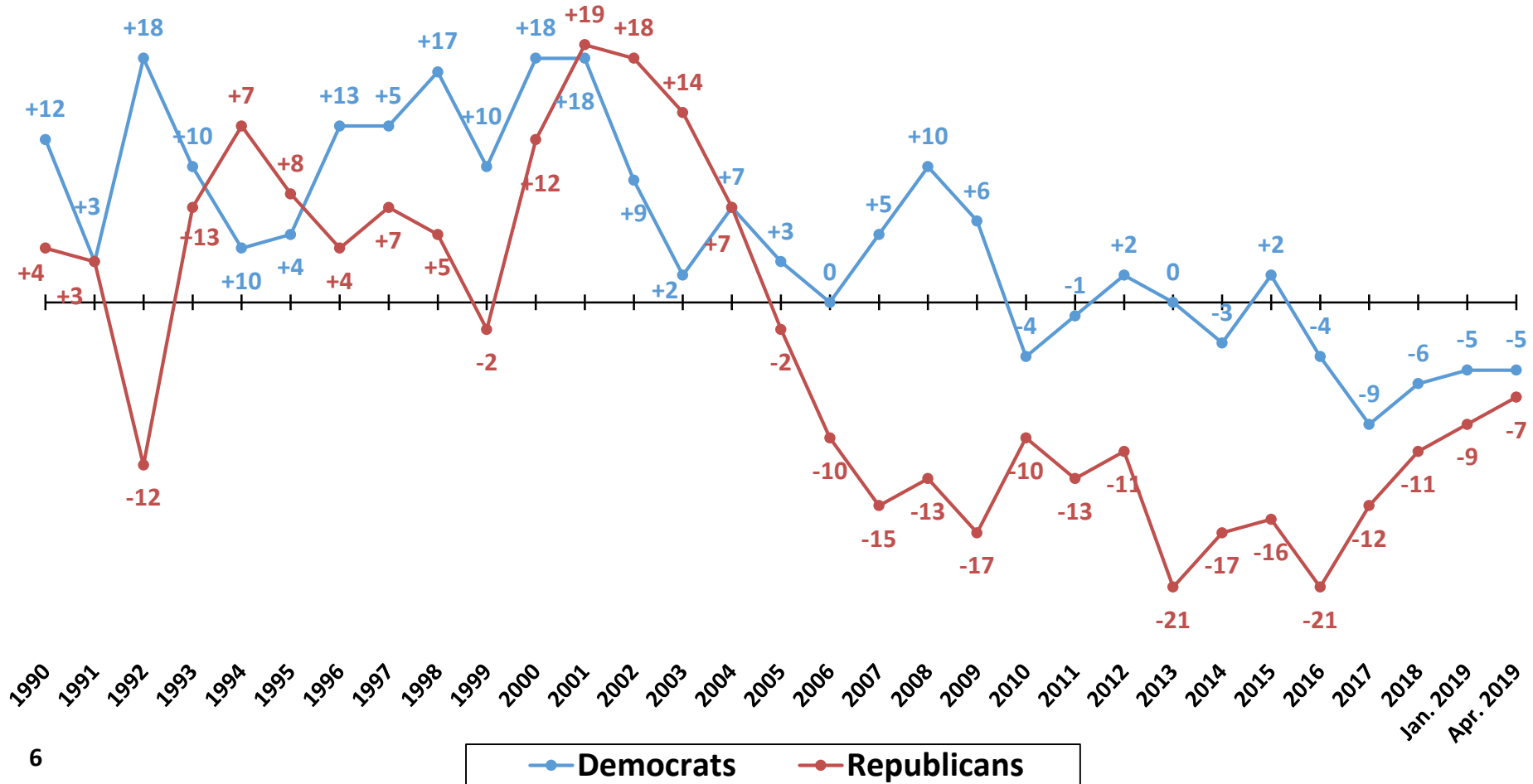
Republicans lost 40 House seats while only losing the actual vote in swing seats by roughly one percentage point.

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%

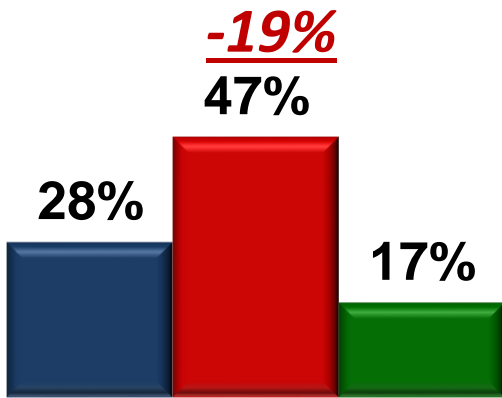


GOP	9%	58%
IND	23%	27%
DEM	48%	9%

*First track as Speaker

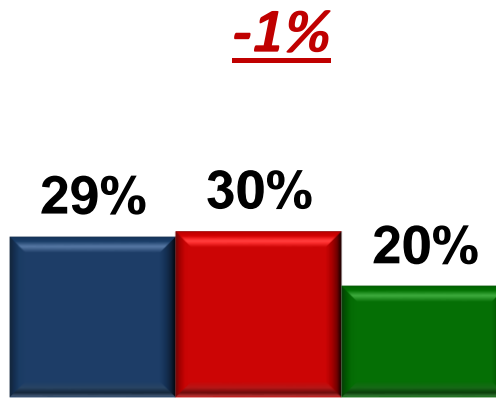


GOP	4%	64%
IND	14%	29%
DEM	46%	9%
DEM PVs	51%	9%



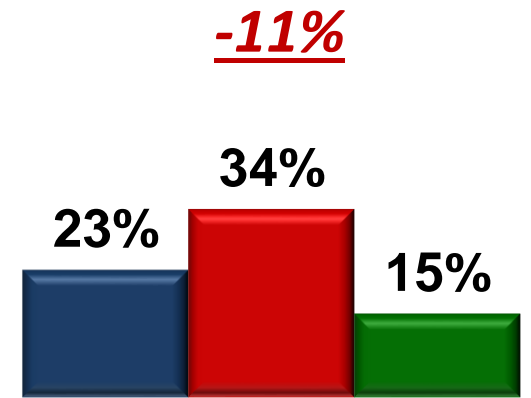
Nancy Pelosi
(January 2019)

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

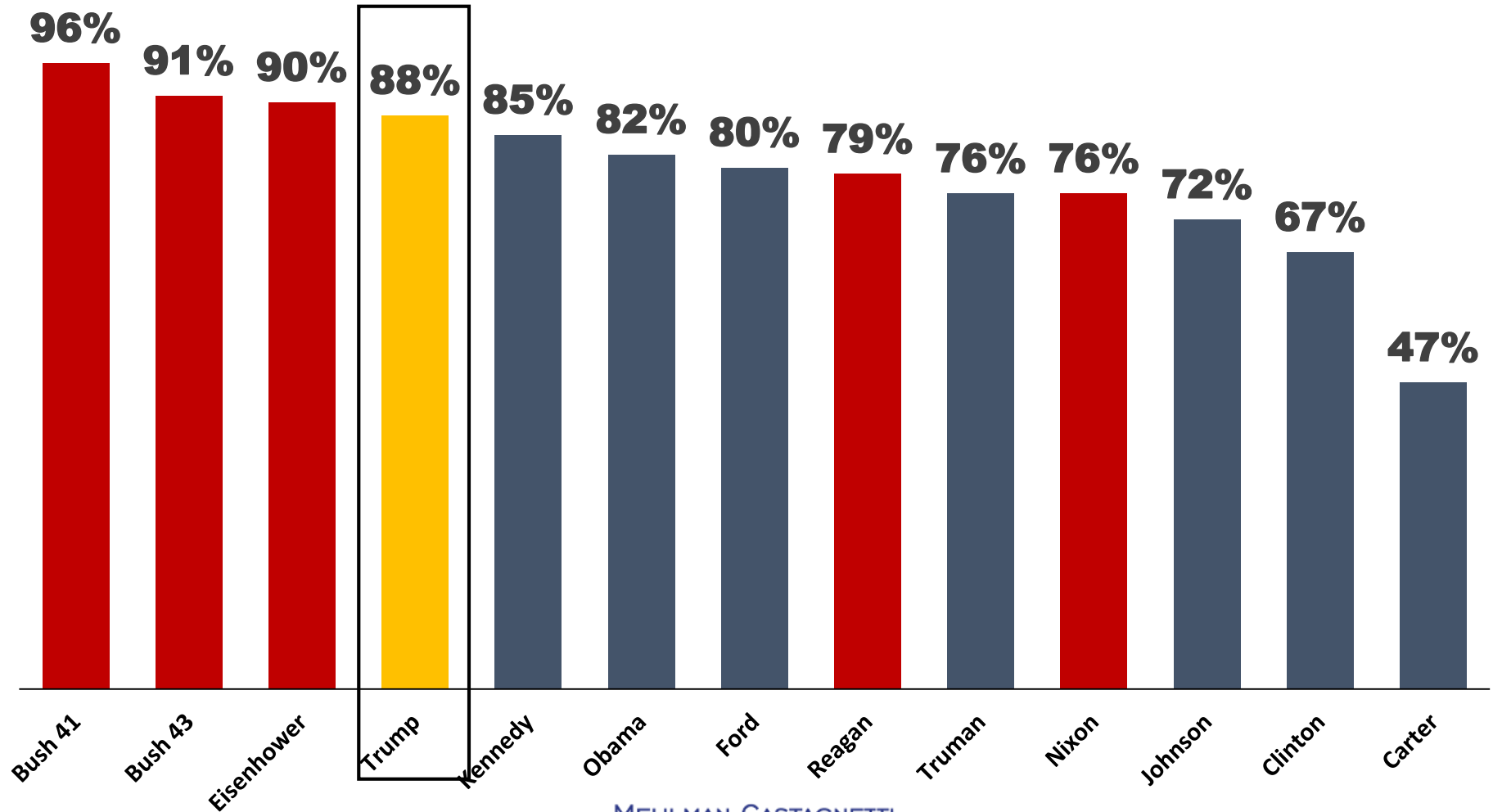
"Push the envelope."

"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.

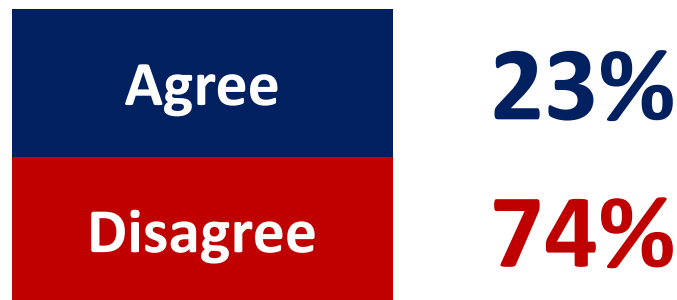
MEHLMAN CASTAGNETTI
— ROSEN & THOMAS —

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

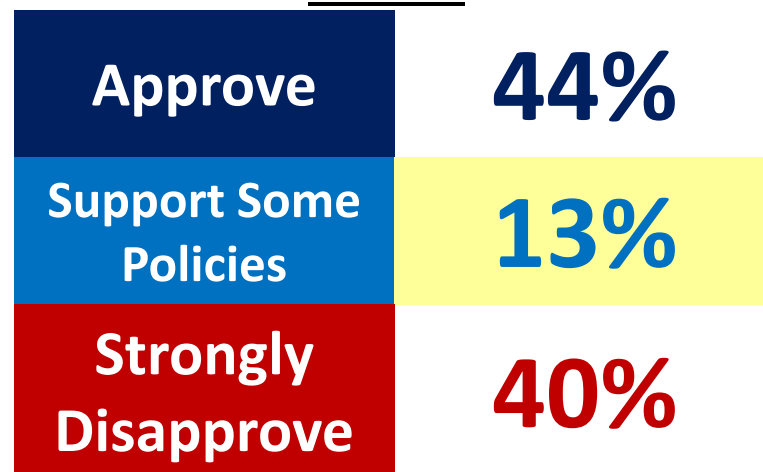


Agree/Disagree: Even though I don't approve of the job Trump is doing as President, I do support some of the policies he is supporting.

Among Those That Disapprove...



Recalculated Among All Registered Voters...



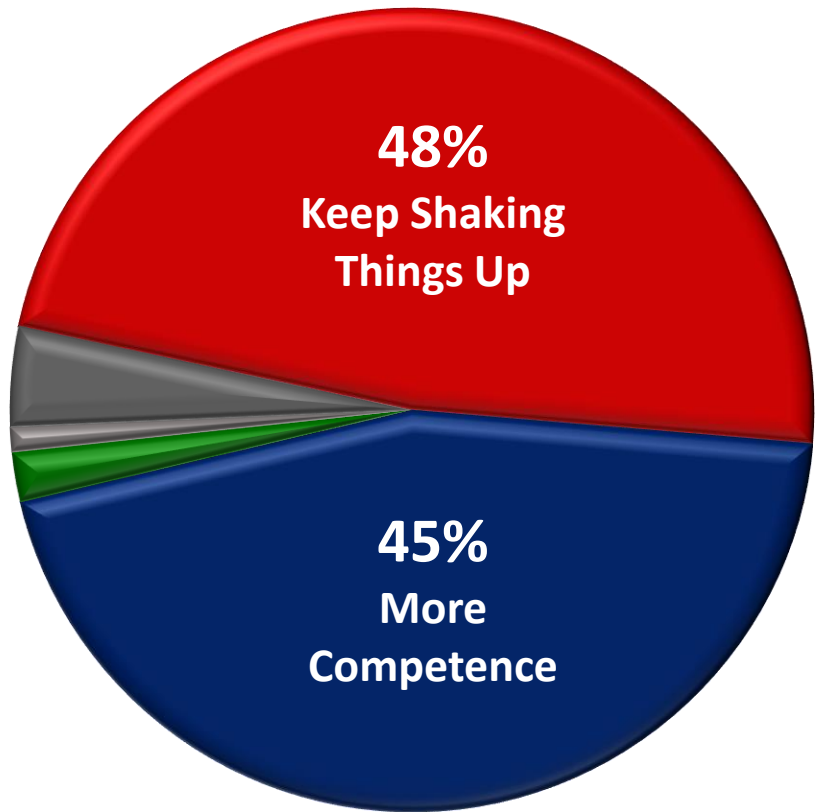
Views of the government in Washington, D.C. tells us people are still looking for major changes.

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.”

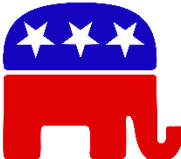
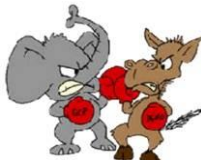

This thematic/debate is at the heart of the 2020 election.

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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