

Political Pulse in Election Year 2014 AAPA Spring Conference

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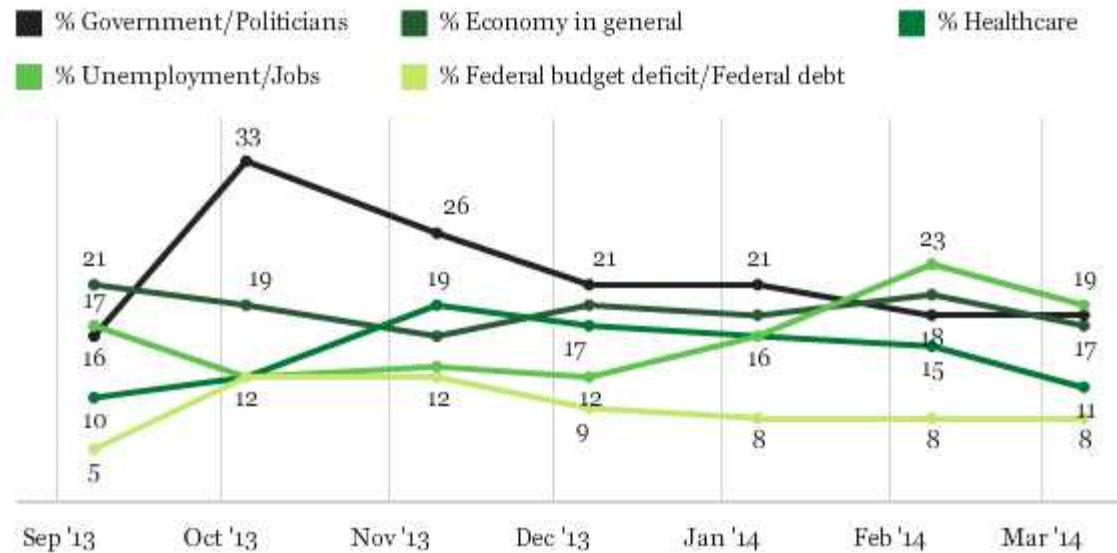
National Mood



Government and politicians spiked as the top problem facing America in the wake of the government shutdown, reaching levels not seen since Watergate, although it has declined in importance since then.

Recent Trend in Top Five "Most Important" U.S. Problems

What do you think is the most important problem facing this country today? (open-ended and coded)

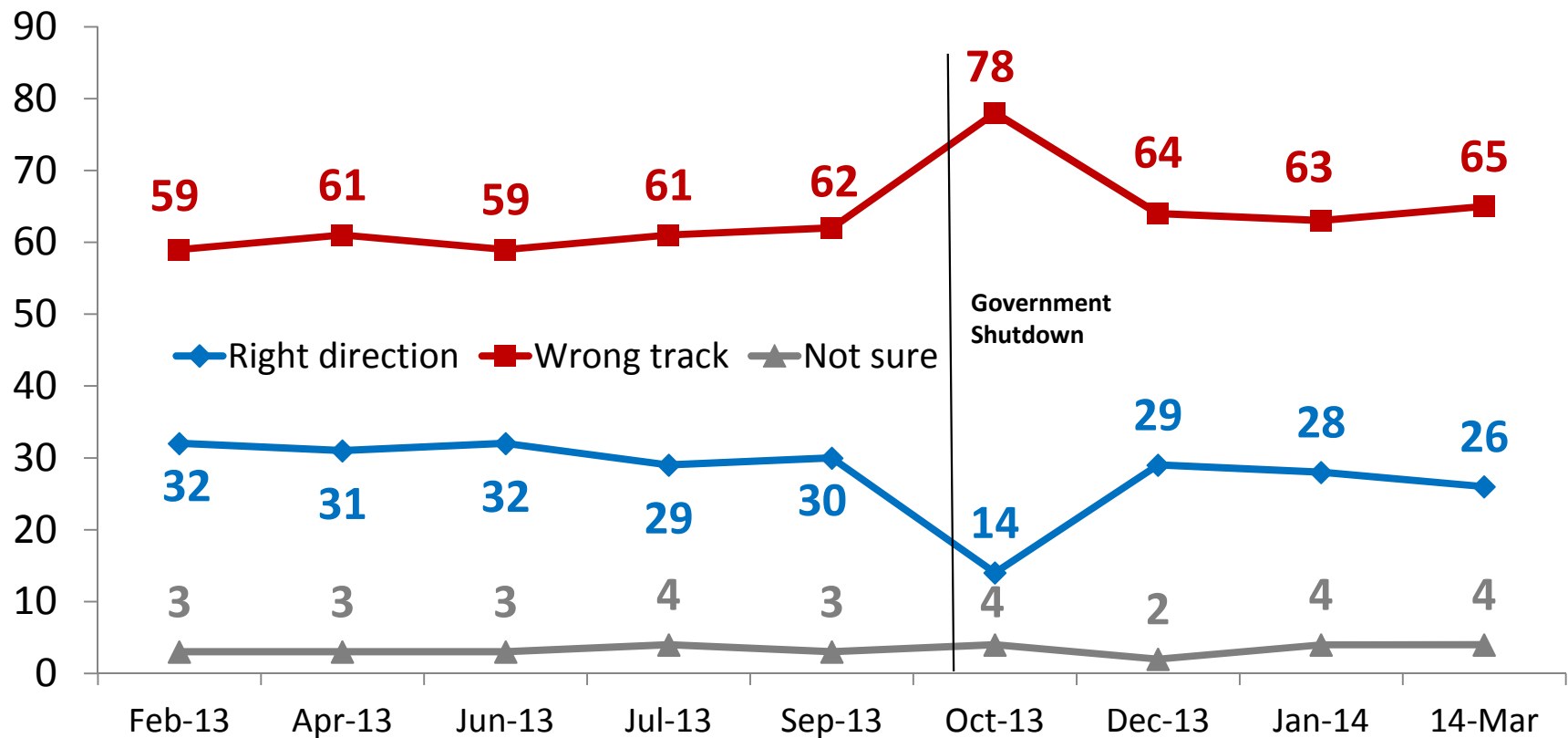


GALLUP

Source: Gallup

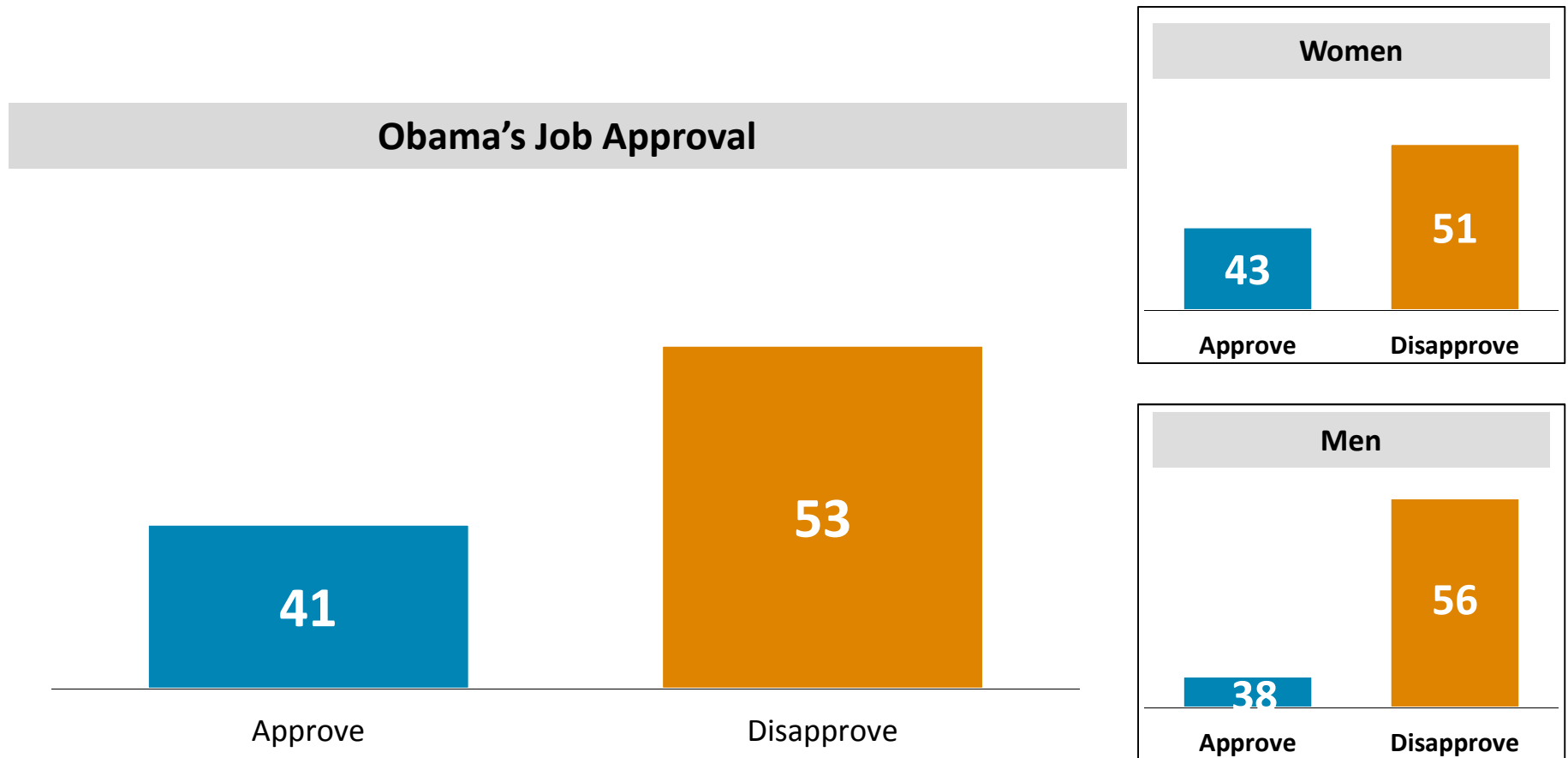
Americans are intensely frustrated with their government and believe that the country is off on the wrong track.

All in all, do you think things in the nation are generally headed in the right direction, or do you feel things are off on the wrong track?



Source: NBC/Wall Street Journal Survey. Conducted by Hart Research Associates & Public Opinion Strategies.

Obama's job approval rating is solidly net negative, with noticeably worse numbers among men than among women.



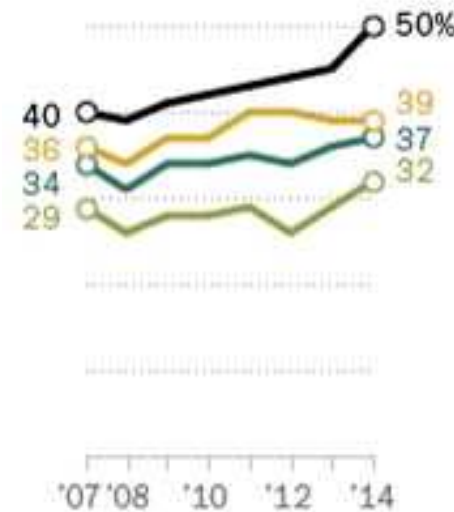
January Battleground Poll conducted by Lake Research Partners and the Tarrance Group. Conducted January 12th-January 16th, 2014 among 1,000 likely 2014 voters. Margin of error +/- 3.1%.

Part of the difficulty Democrats face in winning midterm elections is that younger voters, their strongest age cohort, are more averse to aligning themselves with institutions, including political parties.

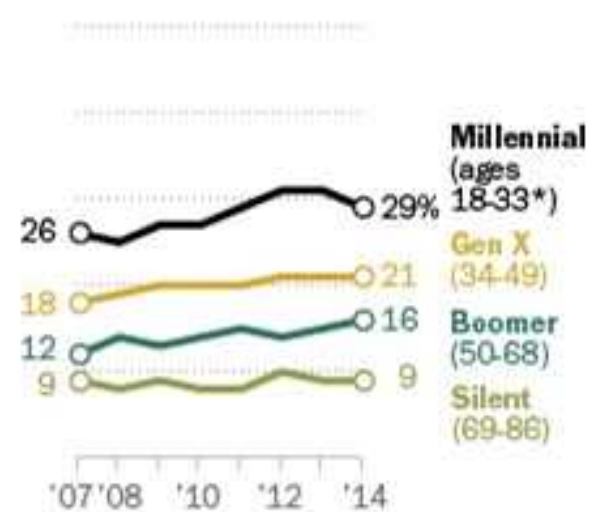
Along with their general cynicism toward politics, this compounds the challenge of getting them to the polls in non-presidential elections.

Millennials: Unmoored from Institutions

Percent who consider themselves political independents



Percent of adults in each generation who are religiously unaffiliated

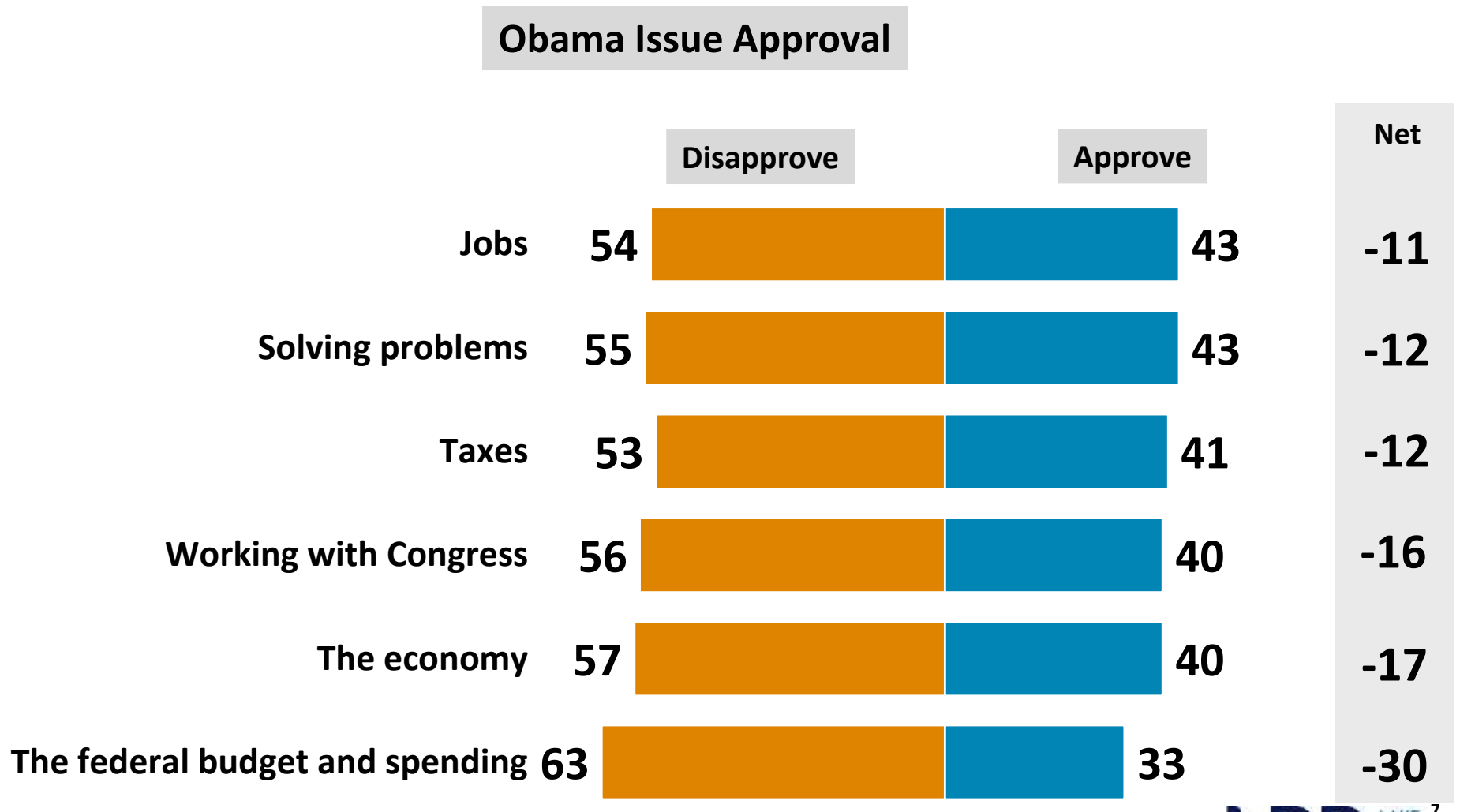


* Age ranges are for 2014

Source: Data points represent totals based on all Pew Research surveys of the general public conducted in that calendar year.

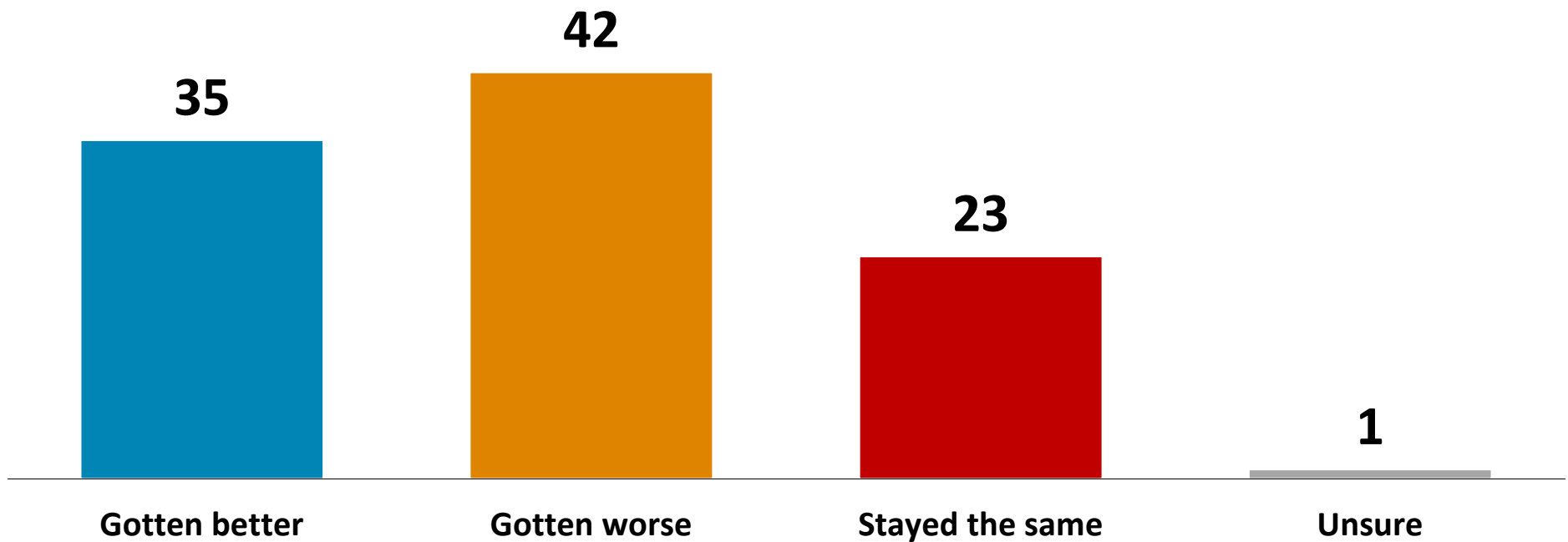
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Obama receives negative job approval ratings across all major issues, with the lowest ratings on the federal budget and spending.



January Battleground Poll conducted by Lake Research Partners and the Tarrance Group. Conducted January 12th-January 16th, 2014 among 1,000 likely 2014 voters. Margin of error +/- 3.1%.

Most Americans say the economy has gotten worse over the last four years, with barely one-in-three saying it has improved.

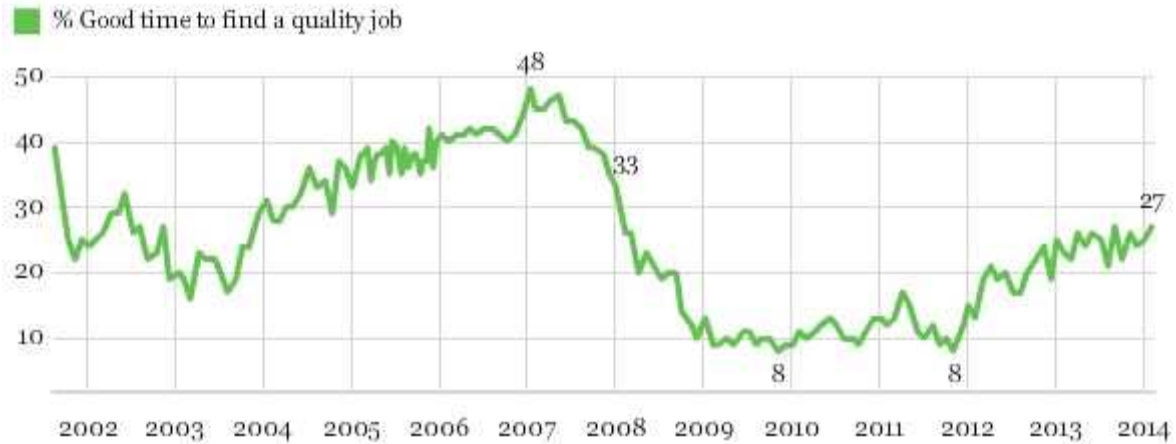


January Battleground Poll conducted by Lake Research Partners and the Tarrance Group. Conducted January 12th-January 16th, 2014 among 1,000 likely 2014 voters. Margin of error +/- 3.1%.

While it remains far below the levels experienced before the economic crash, the number of Americans saying now is a good time to find a quality job is inching upwards.

Is Now a Good Time to Find a Quality Job?

Thinking about the job situation in America today, would you say that it is now a good time or a bad time to find a quality job?



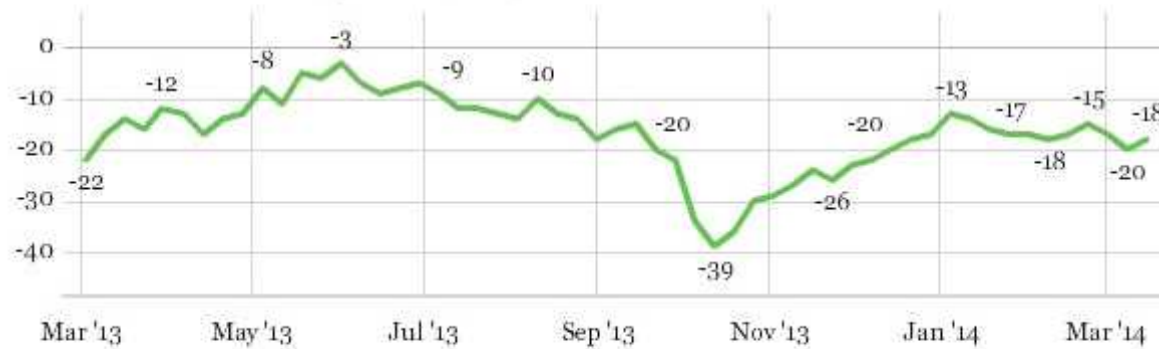
GALLUP

Source: Gallup

Americans' economic confidence is creeping upwards after bottoming out after the government shutdown in October.

Gallup Economic Confidence Index -- Weekly Averages

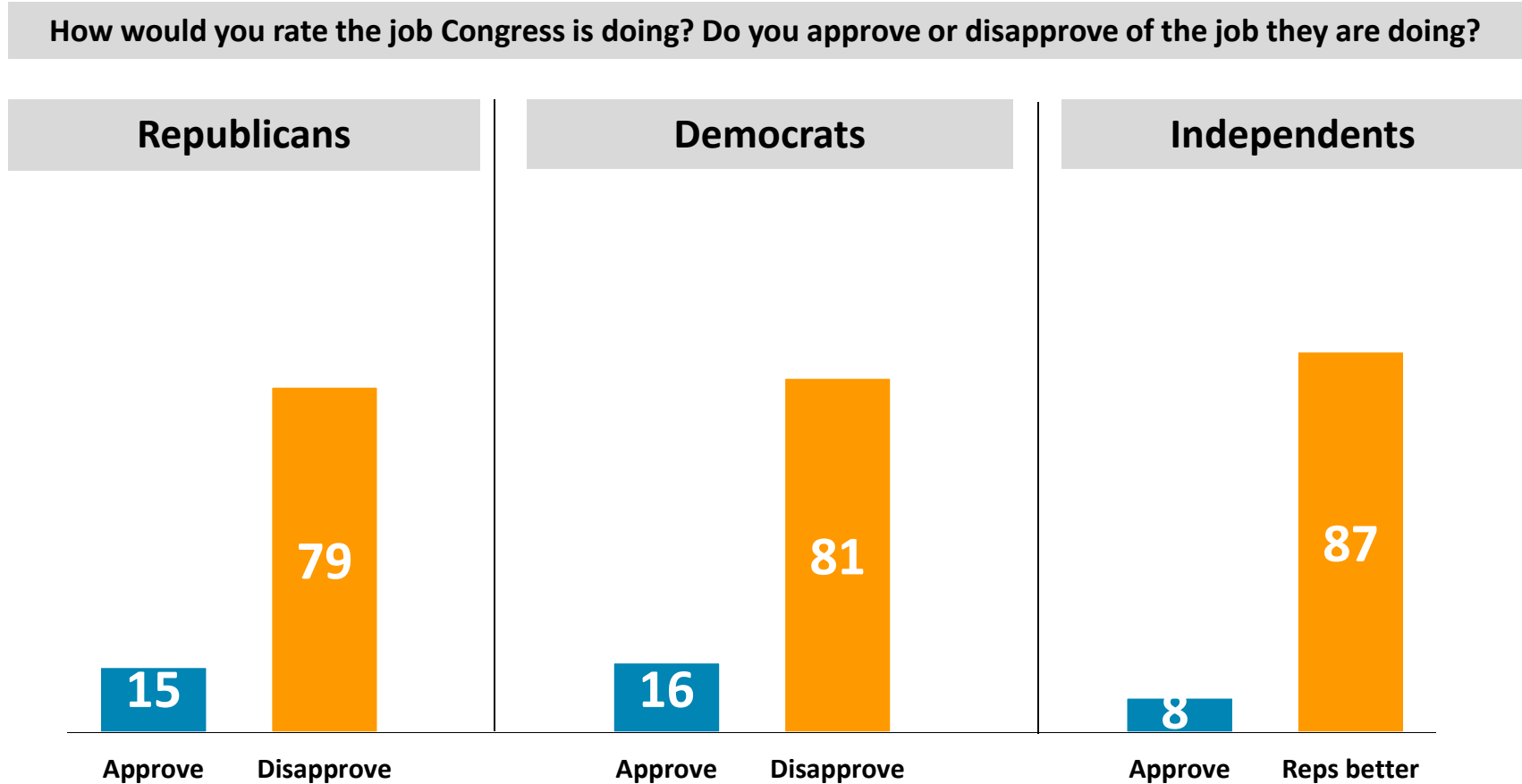
Latest results for week ending March 16, 2014



Gallup Daily tracking

GALLUP

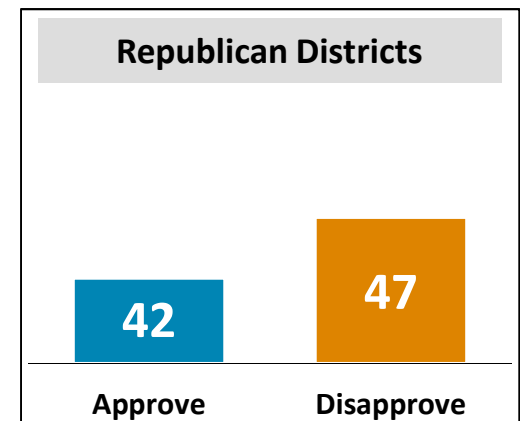
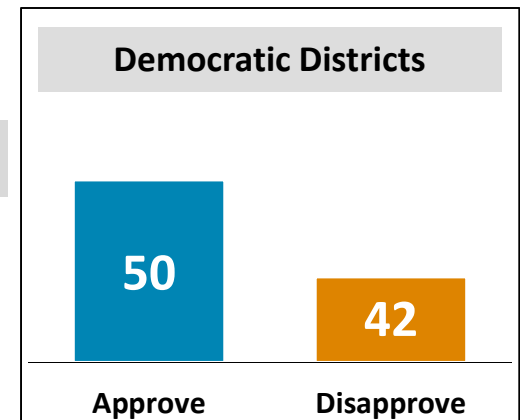
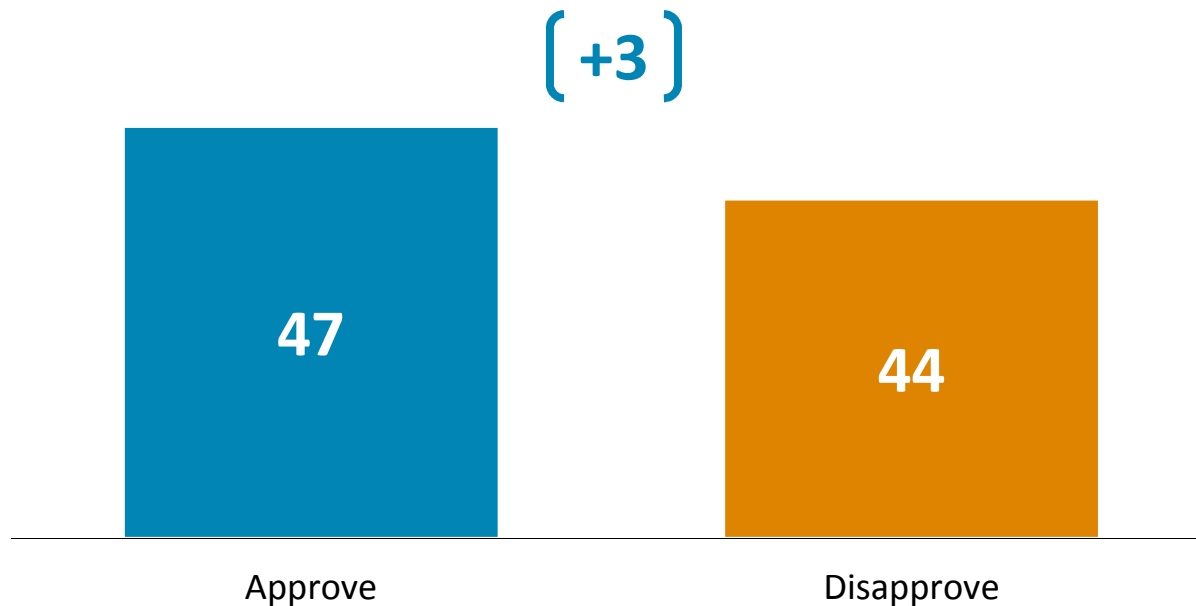
Disapproval of Congress unites voters of both parties, but independents give the lowest approval ratings.



January Battleground Poll conducted by Lake Research Partners and the Tarrance Group. Conducted January 12th-January 16th, 2014 among 1,000 likely 2014 voters. Margin of error +/- 3.1%.

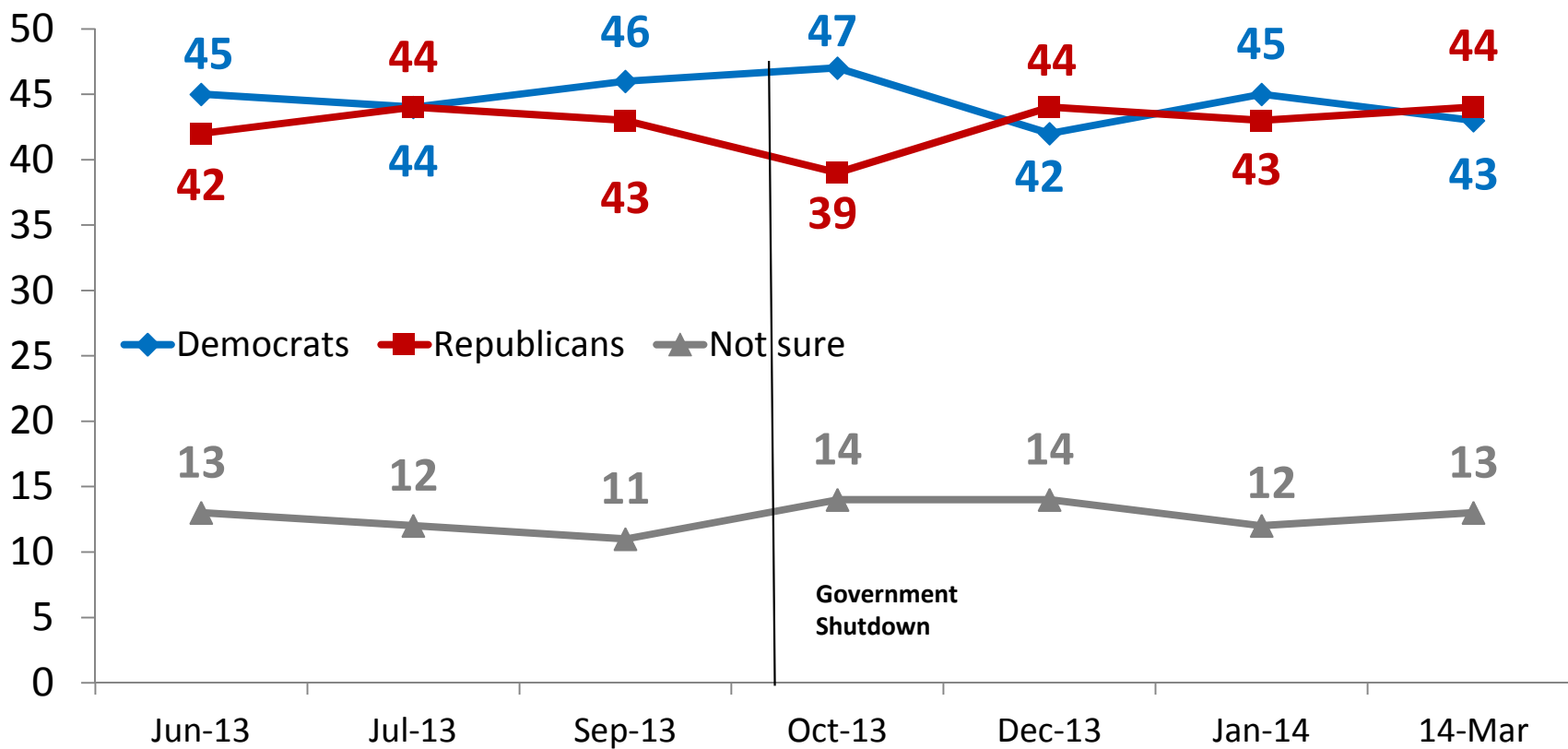
Voters blame Congress but do not make exceptions for their members.
Constituents of Democratic members are generally more supportive than those in Republican districts.

How would you rate the job your member of Congress is doing?



Democrats saw a bump in their support during the government shutdown, but now the race for control of Congress is neck and neck.

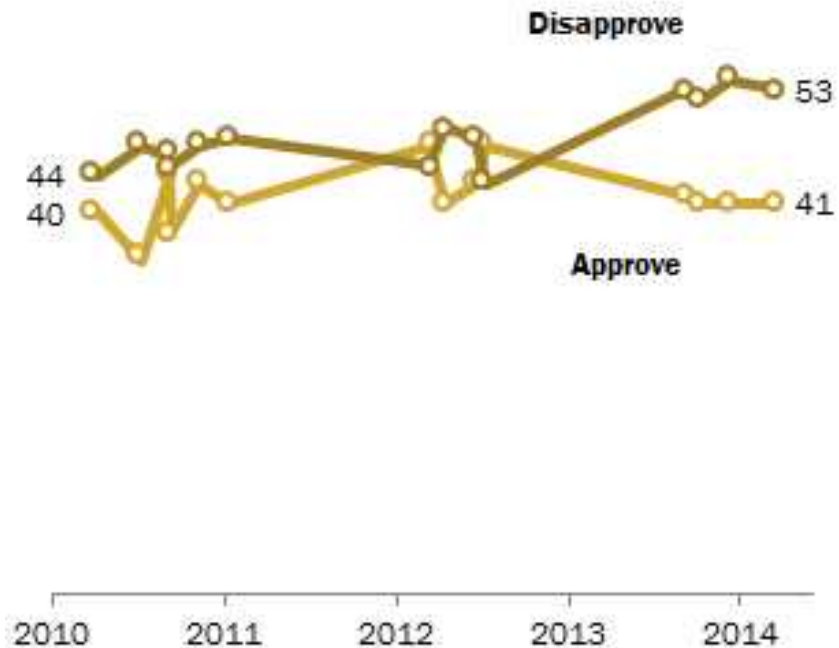
What is your preference for the outcome of this year's congressional elections – a Congress controlled by Republicans or a Congress controlled by Democrats?



Source: NBC/Wall Street Journal Survey. Conducted by Hart Research Associates & Public Opinion Strategies

Four Years After Enactment Health Care Law Remains Unpopular

Disapproval of
Obamacare remains
a serious problem
for Democrats this
election year.

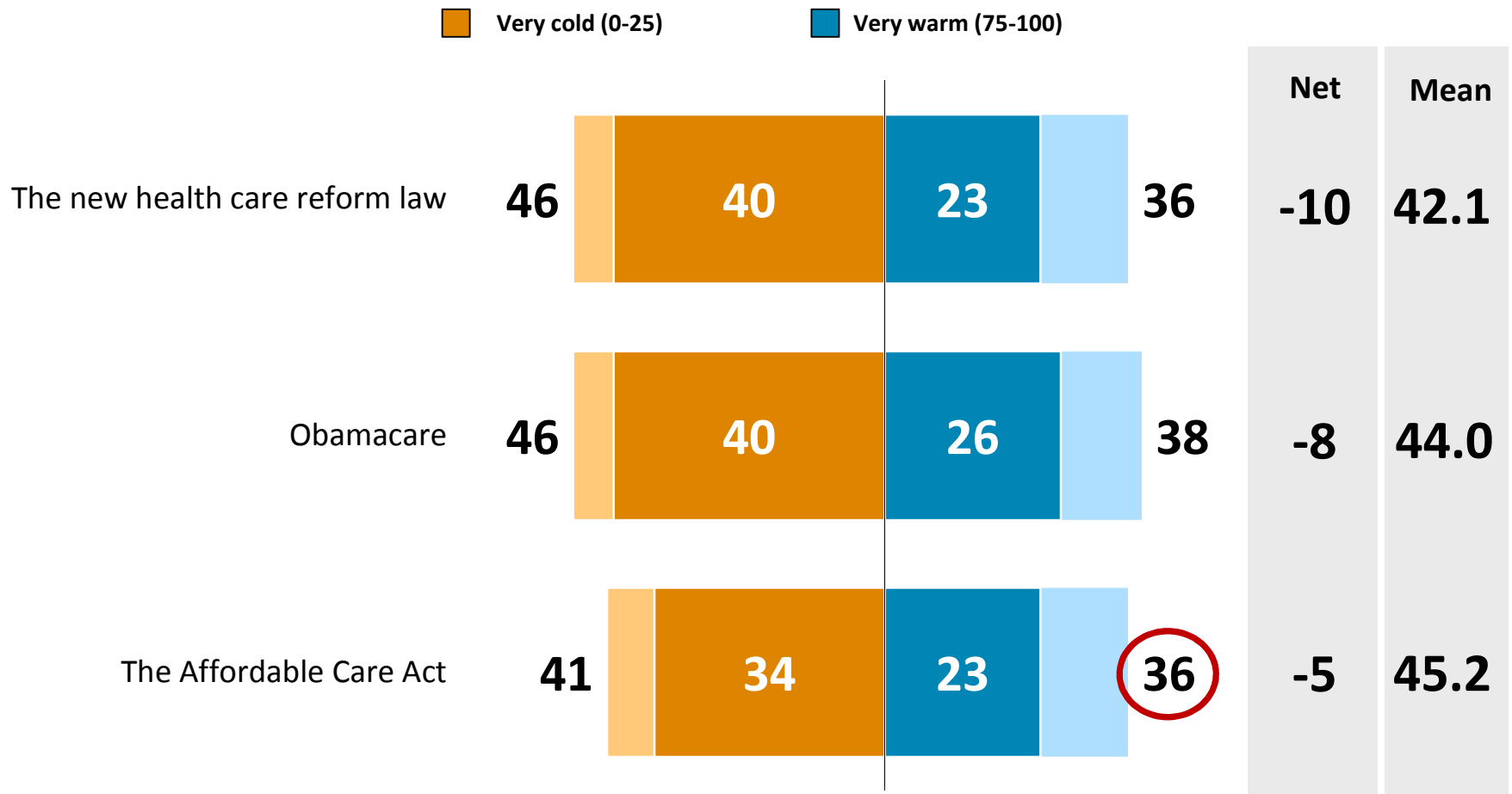


Survey conducted Feb. 27-March 16, 2014.

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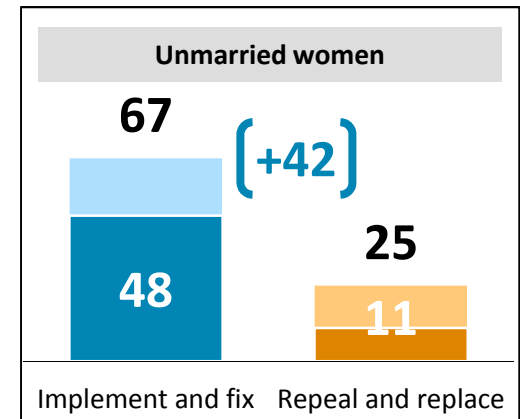
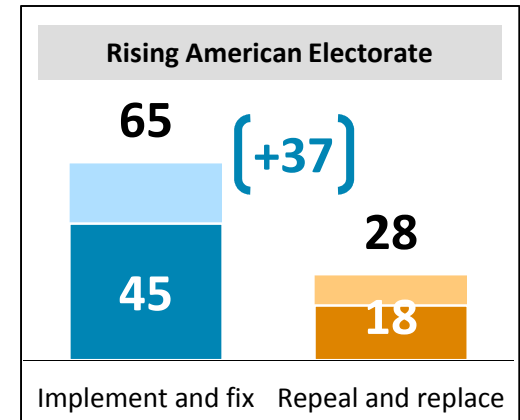
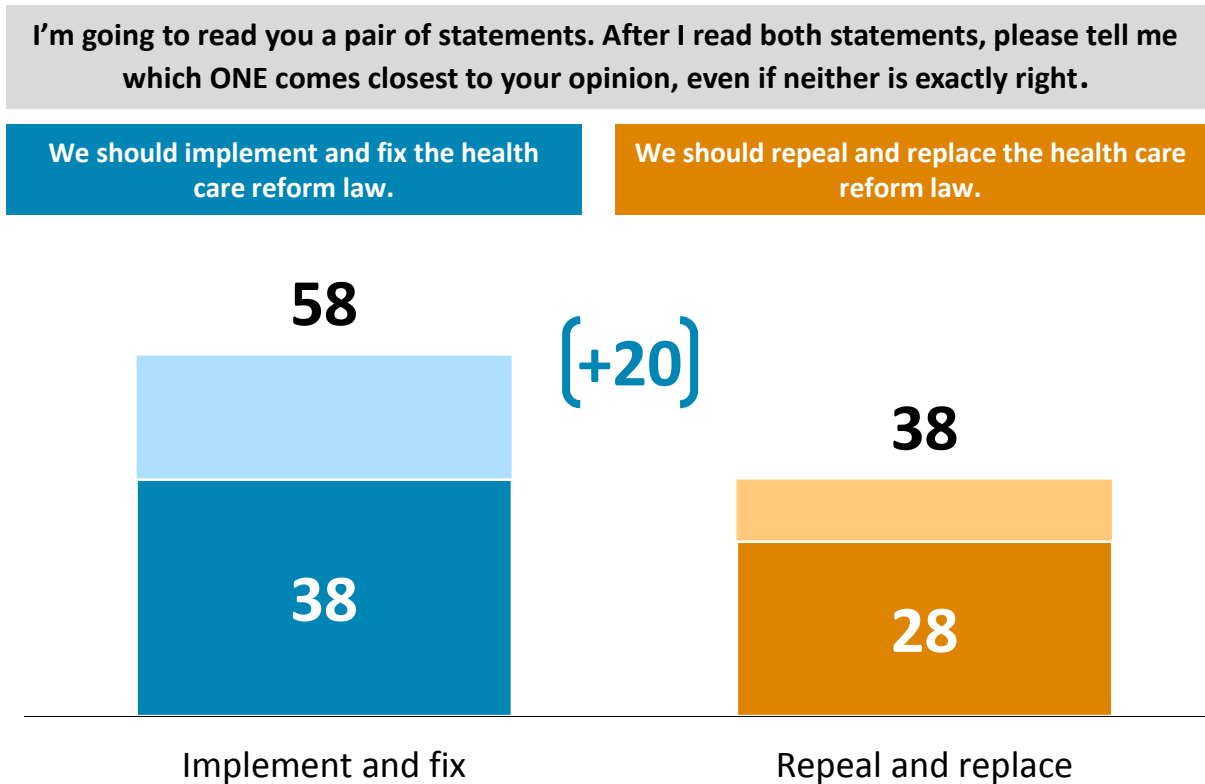
Terminology is key as well when it comes to health care reform. Americans are slightly more favorable of the Obamacare terminology than the Affordable Care Act.

Now I'd like to rate your feelings toward some people and organizations, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.



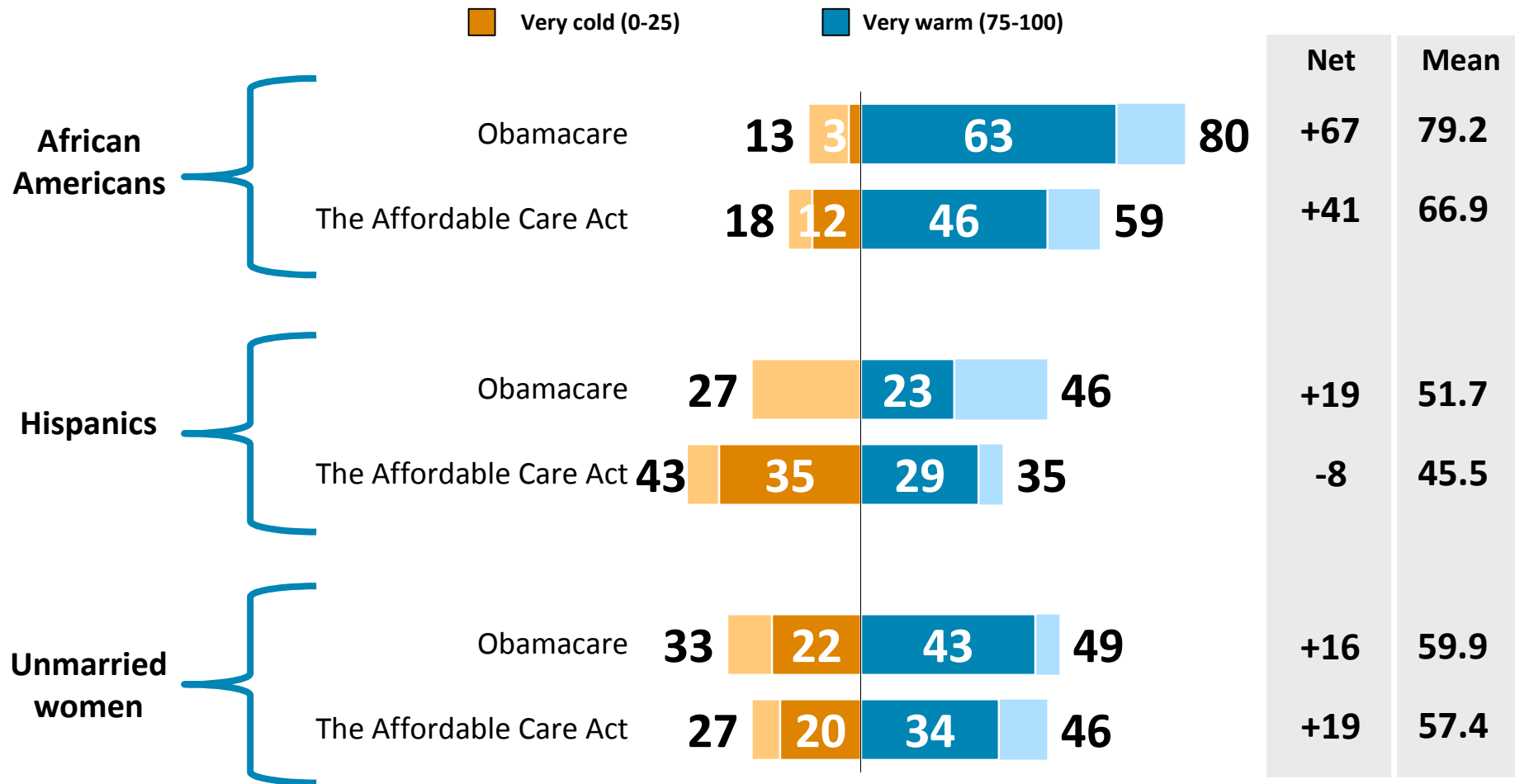
Source: Greenburg Quinlan Rosner Research. The survey of 950 2012 voters (1150 unweighted) nationwide, including 860 likely 2014 voters, was conducted from October 6-8, 2013.

While Americans overall support the health care reform law, the RAE widely support it and would rather see it implemented and fixed than repealed.



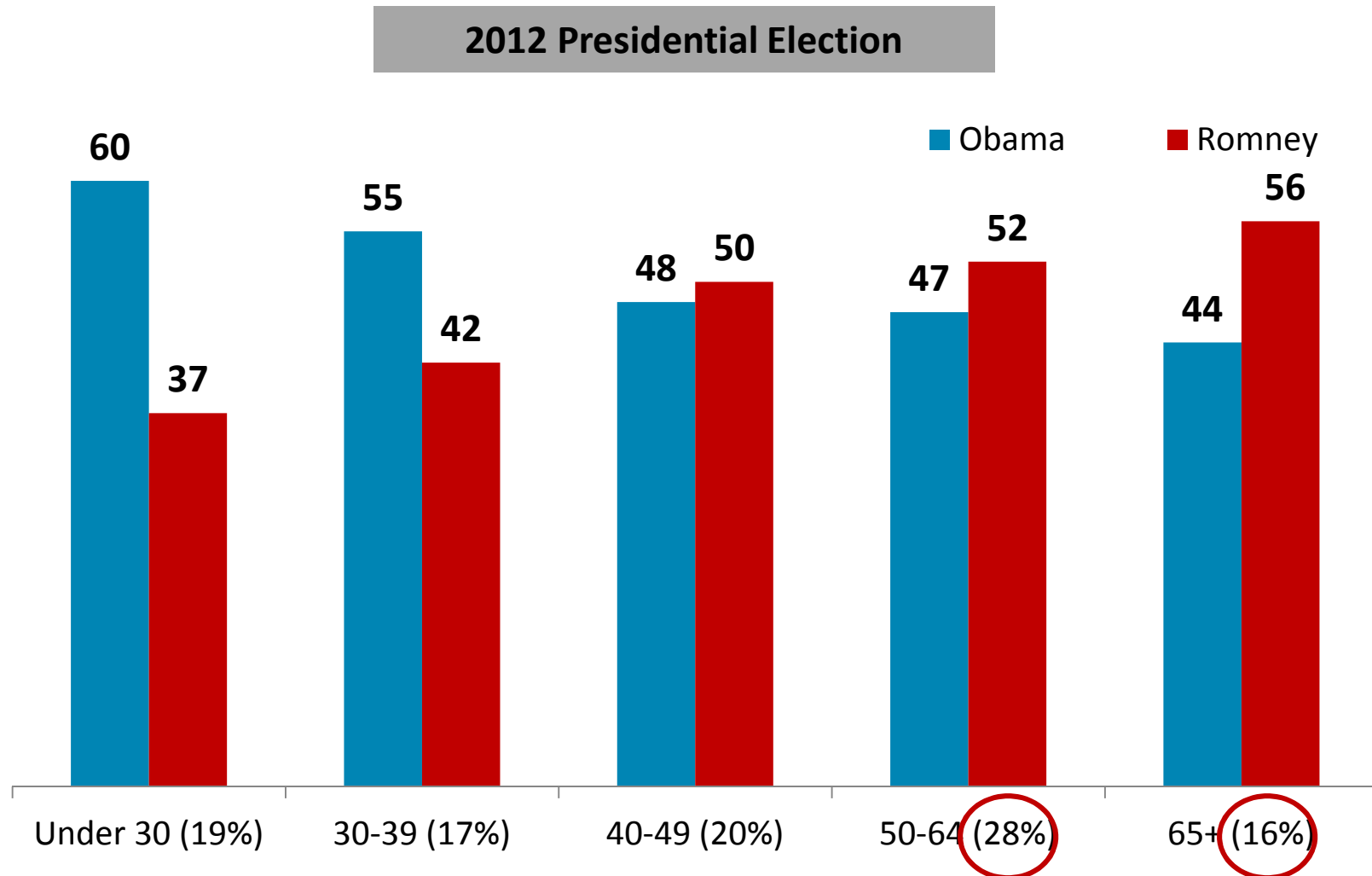
The RAE, and African Americans in particular, favor Obamacare by wider margins.

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Source: Greenburg Quinlan Rosner Research. The survey of 950 2012 voters (1150 unweighted) nationwide, including 860 likely 2014 voters, was conducted from October 6-8, 2013.

In 2012 only 44% of the electorate was over 50, but in 2014 it could be as high as 57%.



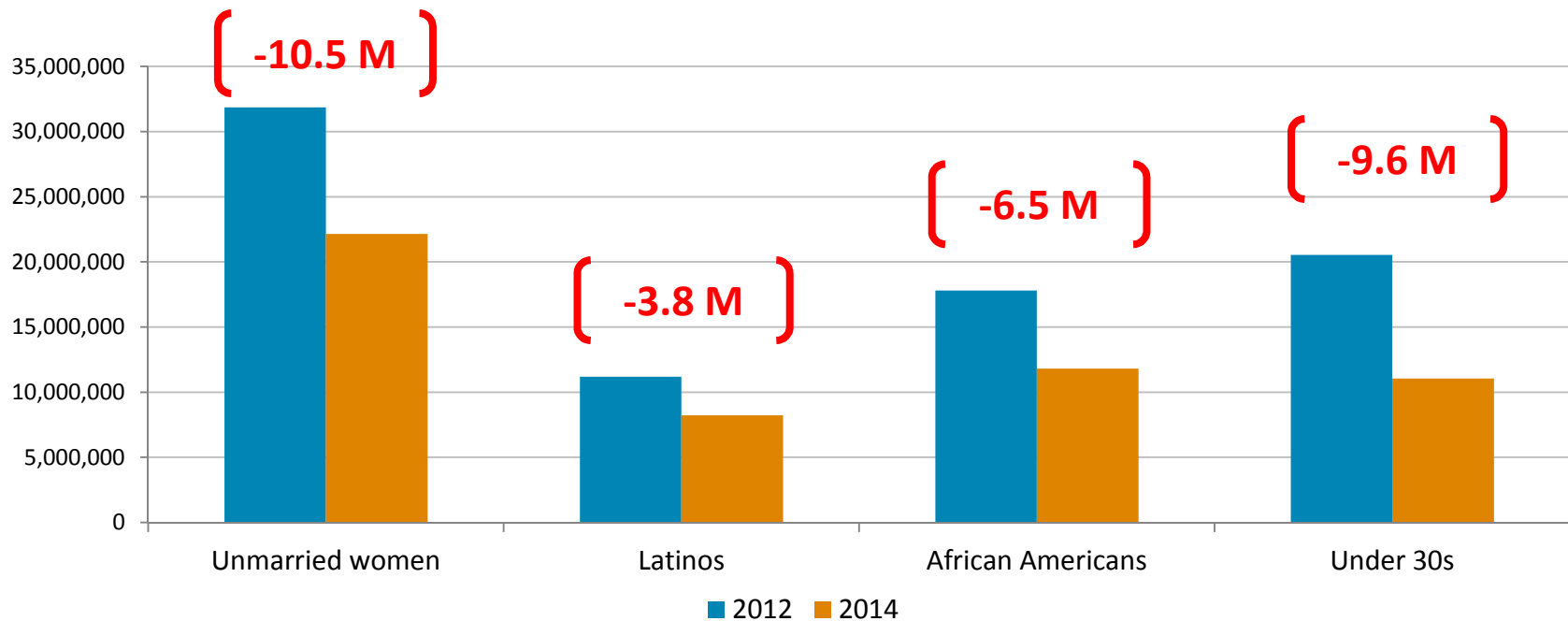
Source: CNN Exit Data 2012

Key Demographic Groups for 2014

- There is always drop-off from presidential to off year elections. Drop-off in 2010 was larger than it had been previously, especially among voters of diverse ethnic backgrounds, younger voters, and unmarried voters (especially women), of whom more than 20 million voters did not return to the polls.
- 34 million voters are expected to drop off from 2012 to 2014.
- Of women drop-off voters, 55.4% are unmarried.
- Drop-off among voters in off year elections can have real impacts on elections.

National Drop-Off

- **Unmarried Women Voter drop-off: 32.9%**
 - Est. 10.5 million votes
- **African American Voter drop-off: 36.2%**
 - Est. 6.5 million votes
- **Latino Voter drop-off: 34.1%**
 - Est. 3.8 million votes
- **Under 30 Voter drop-off: 46.8%**
 - Est. 9.6 million votes



Source: Census Bureau, CPS November 2012 supplement, Catalyst

Key 2014 Issues

Although several pressing, and polarizing, issues are already on the table for 2014, the economy will be the central framework for voters in this election.



Key 2014 Issues

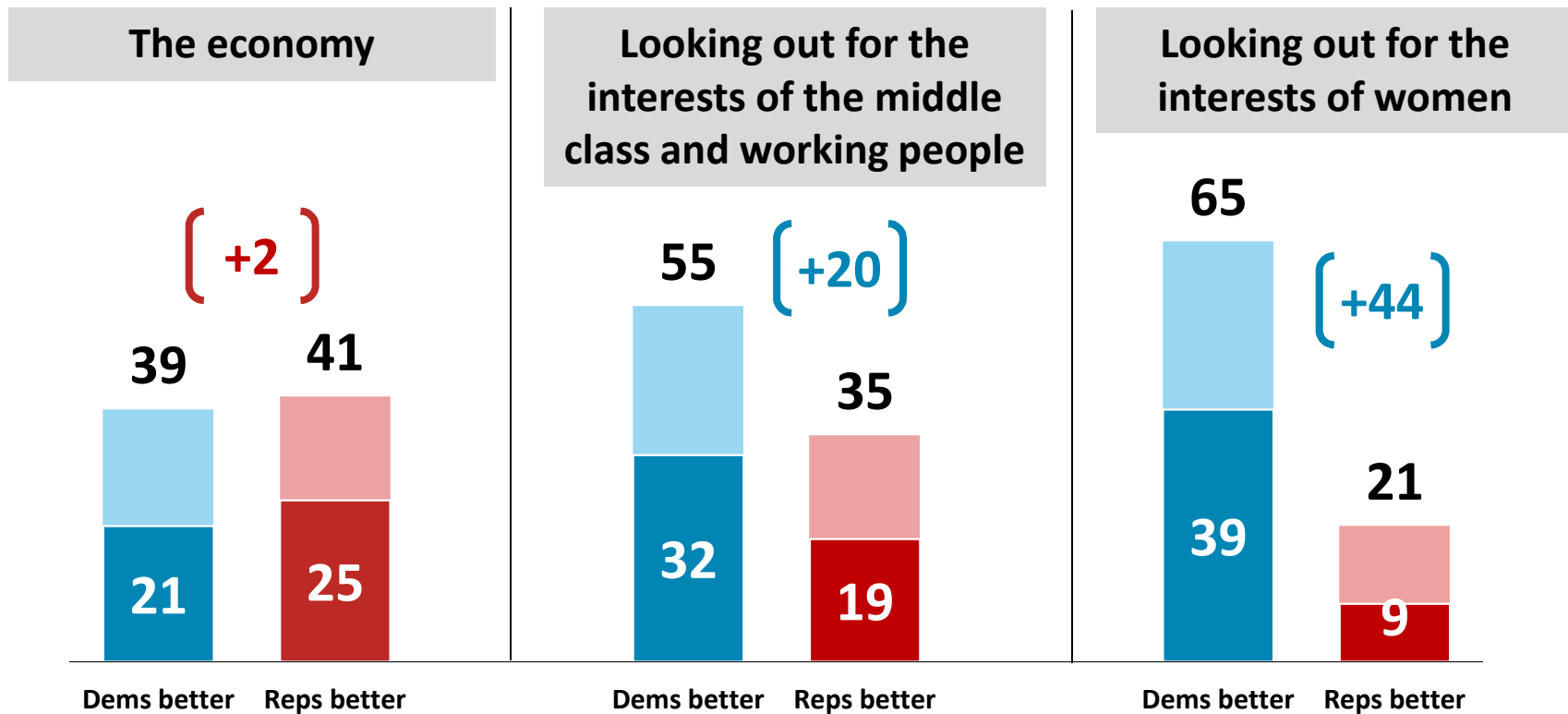
- National perceptions of the **economy** always trail actual economic conditions, but better than expected growth in the fourth quarter of 2013 could help Democrats and President Obama's approval numbers. The disappearing middle class is one of the most powerful ways to express the widening gap between the very wealthy and the rest of the country.
- Both parties will try to position the debate over the economy on their own turf. Democrats will be pushing for a **higher minimum wage, extending unemployment benefits, and equal pay laws for women**. Republicans will blame **Obamacare** for holding back economic growth and the state of the deficit (despite the fact that it is shrinking rapidly, in large part as a result of the ACA). Voters rate the two parties equally on the economy right now.
- While a **budget deal** to avoid another shutdown was struck in December, the long-term debate goes on. The biggest impact of any future budget deals may be the extent to which Republican incumbents are made vulnerable to **primary challengers** who paint them as insufficiently conservative.

Key 2014 Issues

- **Social Security and Medicare** are always top issues for midterm elections (in part because of the older electorate), and that will be the case again in 2014. Look for Democrats to advocate for expanding Social Security and for Republicans to portray themselves as protecting Medicare from Obamacare. Republicans remain vulnerable to attack for the embrace of the Ryan plan last cycle.
- **Obamacare** will undoubtedly be a motivating issue for conservative voters in 2014, but its importance to swing voters will be determined by how successfully the health insurance exchanges operate in the months to come and whether voters see their own health care costs start to settle. The key voters will be non-college, older, white women. While the Healthcare.gov fiasco may be over, enrollment issues for women and small businesses continue to tamp down any success the exchanges have seen.
- The **Snowden** revelations regarding the **NSA** and **US surveillance** will not go away in 2014 as the President and Congressional leaders call for a review of intelligence practices. However, so far few candidates have successfully turned this into an issue that pays political dividends.
- **Women's issues** will continue to play a prominent role in Congressional races, as GOP policies on health care, contraception, and equal pay will force the debate. And as we've seen in previous cycles, it only takes a few inarticulate candidates to bring these issues even more to the forefront.

Democrats are widely seen as the party that does a better job of looking out for the interests of women, the middle class, and the working poor, but the parties are even on the economy.

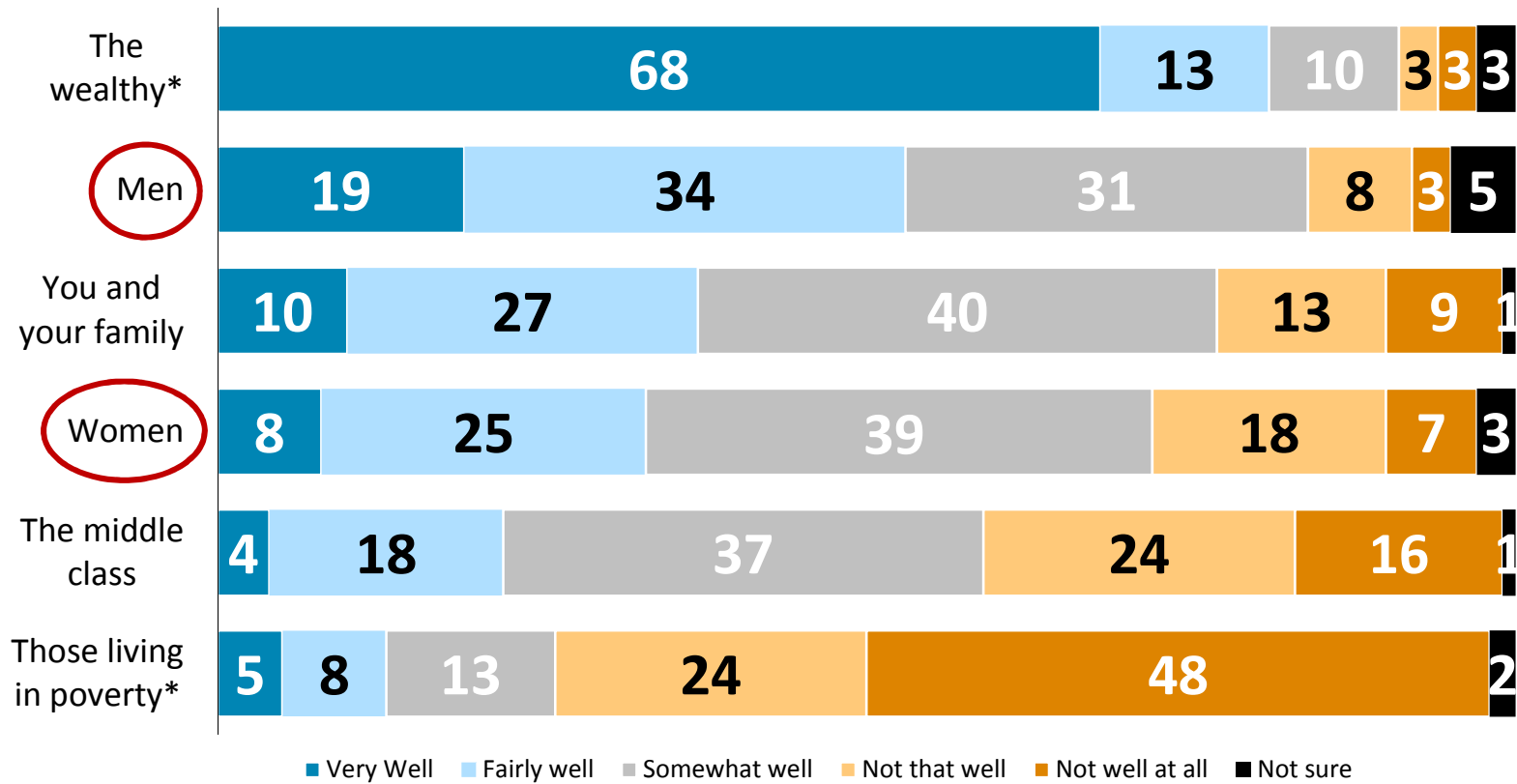
I am going to read you a list of issues and I want you to tell me whether, overall, you think the Democrats or the Republicans would do a better job with each issue. If you do not know, just tell me and we'll move on.



Source: Greenburg Quinlan Rosner Research. The survey of 950 2012 voters (1150 unweighted) and 841 likely 2014 voters nationwide was conducted from July 10-15, 2013.

The wealthy are largely seen as doing very well in the current economy, while women, the middle class, and particularly those living in poverty are not doing well.

I'm going to mention a number of groups of people and for each one, please tell me how well the economy works for that type of person – very well, fairly well, just somewhat well, not that well, or not well at all.



*Asked of half the sample

Source: NBC/Wall Street Journal Survey. Conducted by Hart Research Associates & Public Opinion Strategies. January 22-25, 2014

The Rising American Electorate (RAE) have driven Obama’s victories in 2008 and 2012, and their lack of participation in 2010 led to major Democratic losses. In general, the RAE prioritizes the economy, though the deficit concerns African Americans the least.

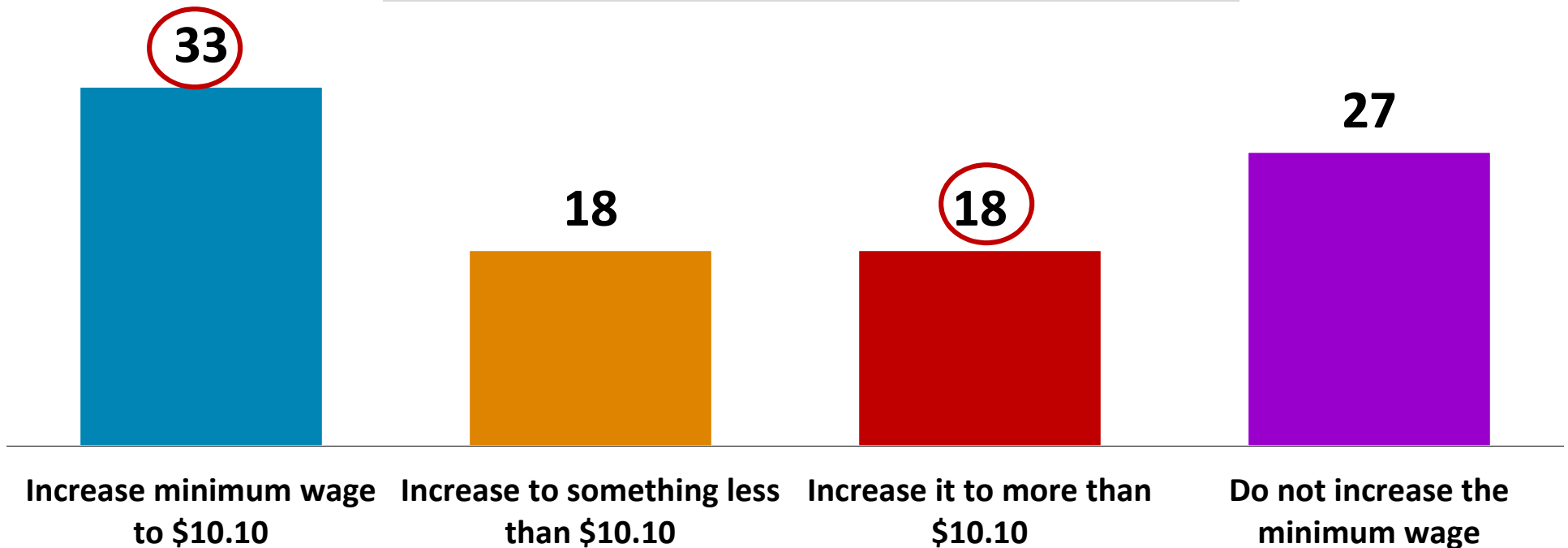
2014 Congress and President Priority	Total Pop	Women	Latinos	African Americans	18-29 Year Olds
Economy	39	37	32	38	31
Deficit	23	21	20	8	19
Health care	16	20	21	21	20
Taxes	4	2	4	4	3
Gun policy	3	3	6	2	2
Immigration	5	6	10	8	6
Something else	9	9	6	13	16
Don't know	2	3	2	5	3

Which of the following do you think should be the most important priority for President Obama and Congress in 2014: the economy, the federal budget deficit, health care, taxes, gun policy, immigration issues, or something else?

Source: Quinnipiac University January 4-7, 2014 1,487 registered voters M.O.E. +/- 2.5 percentage points

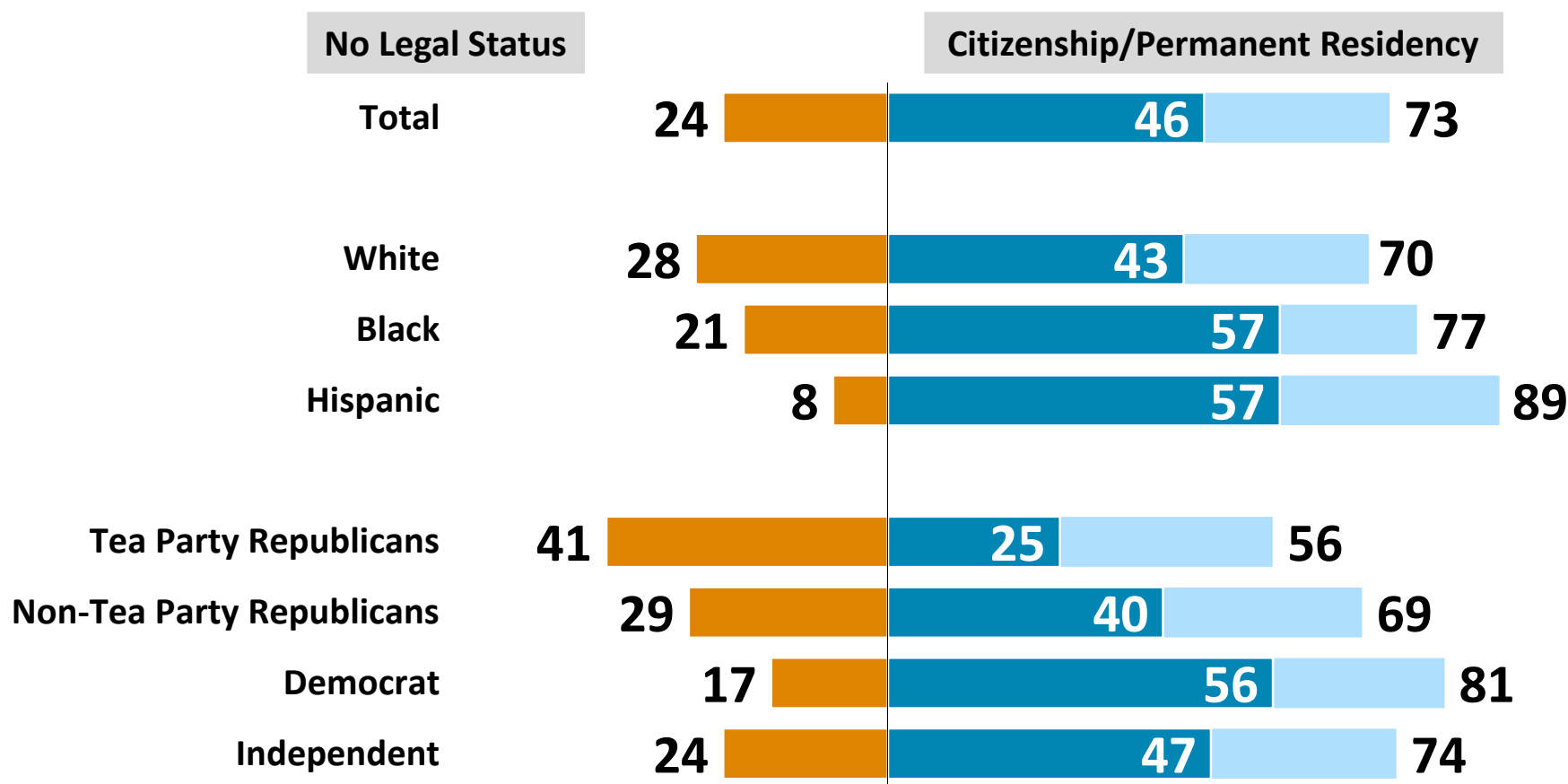
Given the option, most American support increasing the minimum wage, including a majority (51%) who support raising it to \$10.10 an hour or higher. Overall 69% of voters favor increasing the minimum wage.

Would you support or oppose raising the national minimum wage, which is now \$7.25 an hour?



While most Americans favor some type of legal status for undocumented immigrants, there is considerable pushback among Tea Party Republicans for granting citizenship.

Legal Status for Undocumented Immigrants



Which comes closer to your view on how to handle undocumented immigrants who are now living in the U.S.? [If Legal status] and should they be able to apply for U.S. citizenship or be able to apply for permanent residency but not U.S. Citizenship?

Pew Research Center survey conducted February 14th-23rd 2014. Telephone interviews conducted among a national sample of 1,821 adults, ages 18 or older. Margin of error +/- 2.6%.

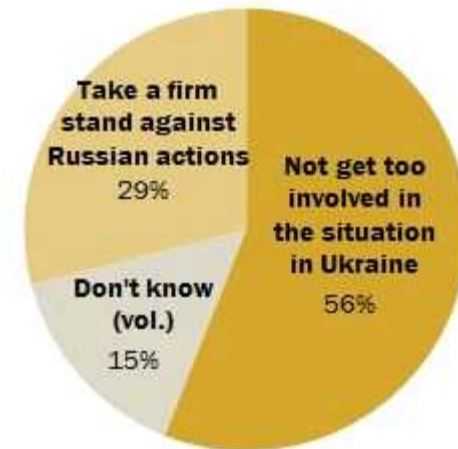
Americans have been following the situation in Ukraine at roughly similar rates to previous international situations in Libya and Egypt. Americans advocate taking a hands off approach to the situation.

	% Following "very" or "somewhat" closely
Russia's involvement in the situation in Ukraine (March 2014)	68
The fiscal cliff, the combination of major tax increase and spending cuts (November 2012)	71
The proposed building of the Keystone XL pipeline, which could carry oil from Canada to Texas (March 2012)	49
U.S. military finding and killing Osama bin Laden (May 2011)	83
The situation in Libya (March 2011)	71
The political crisis and demonstrations in Egypt (February 2011)	69
Classified documents on war in Afghanistan leaked on the Internet (July 2010)	53
The oil spill in the Gulf of Mexico off the coast of Louisiana (May 2010)	87
The tsunami that struck parts of Asia (January 2005)	89
Terrorist attacks on New York City and Washington, D.C. (September 2001)	97

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29% Want 'Firm Stand' by U.S. Against Russia

% saying it is more important for the U.S. to ...



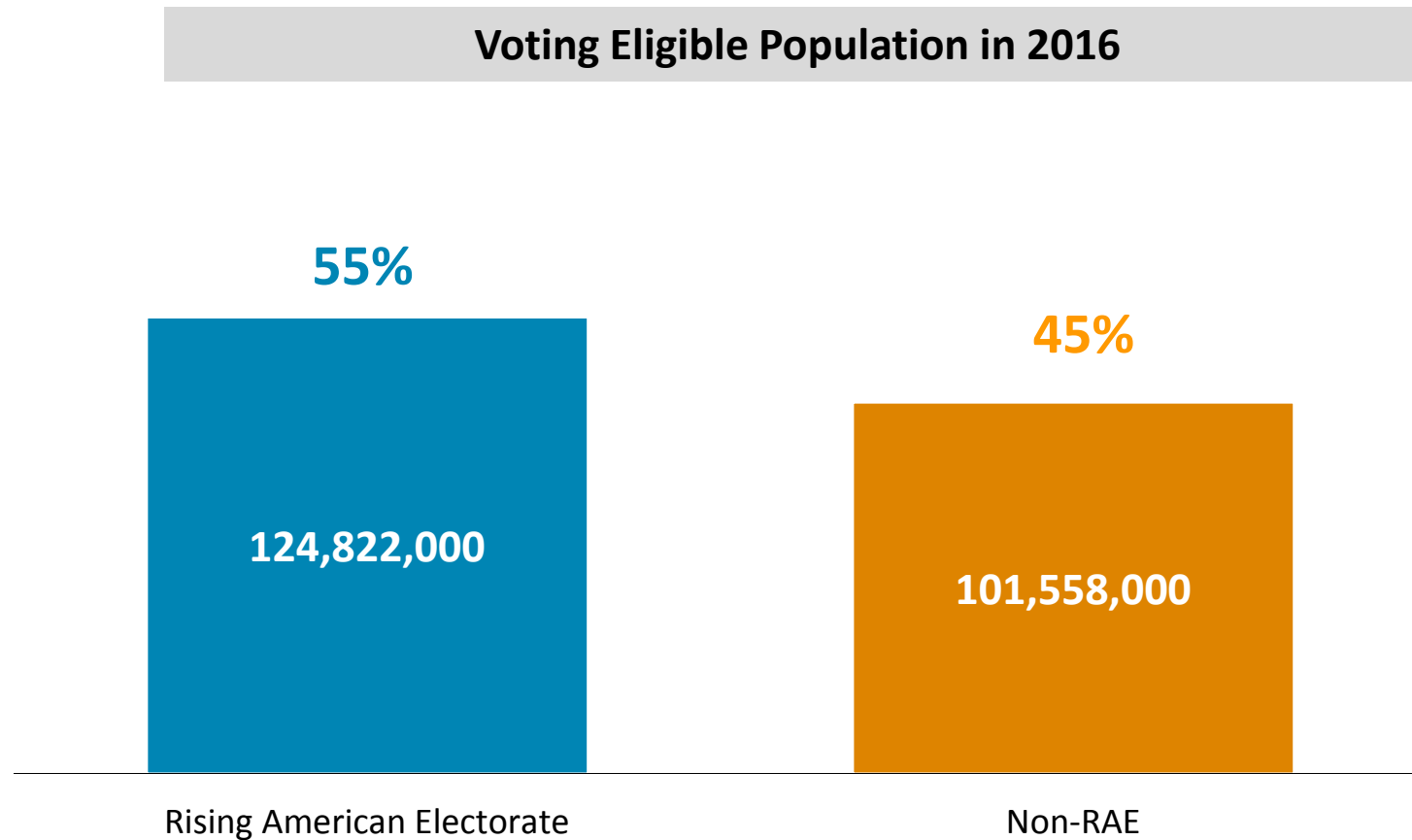
Survey conducted Mar. 6-9, 2014.

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An early look at 2016



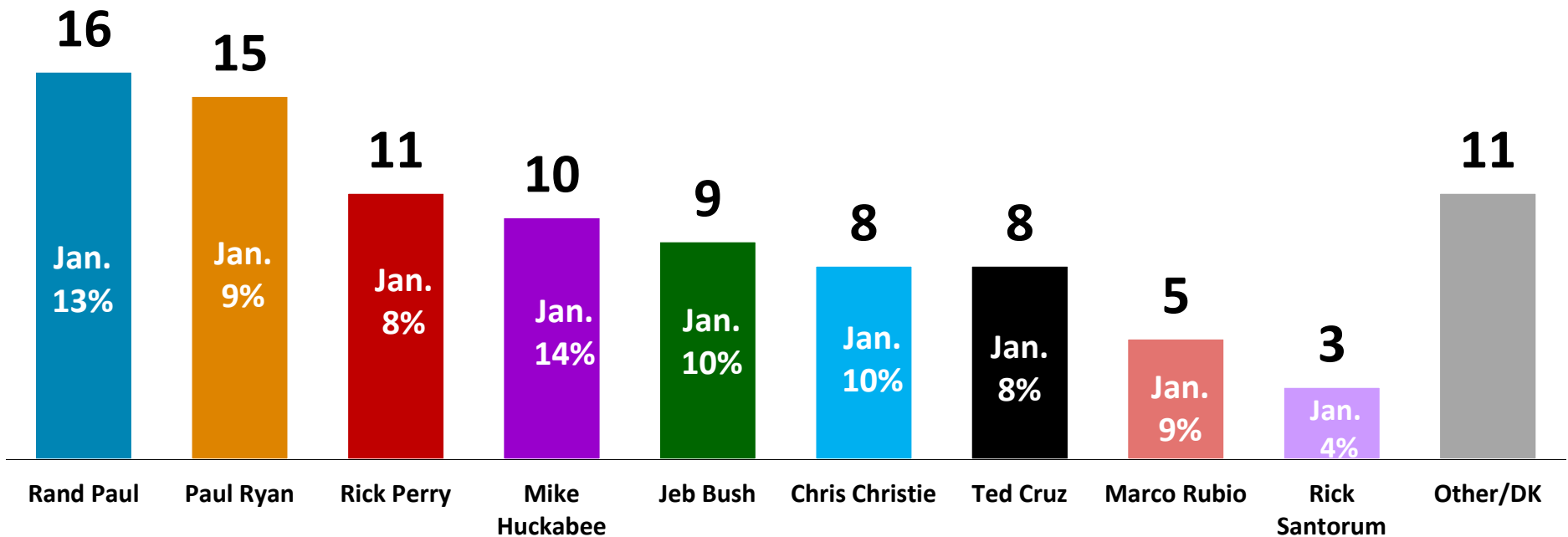
The Rising American Electorate will make up a clear majority of the eligible voters in 2016.



Source: LRP Data projections

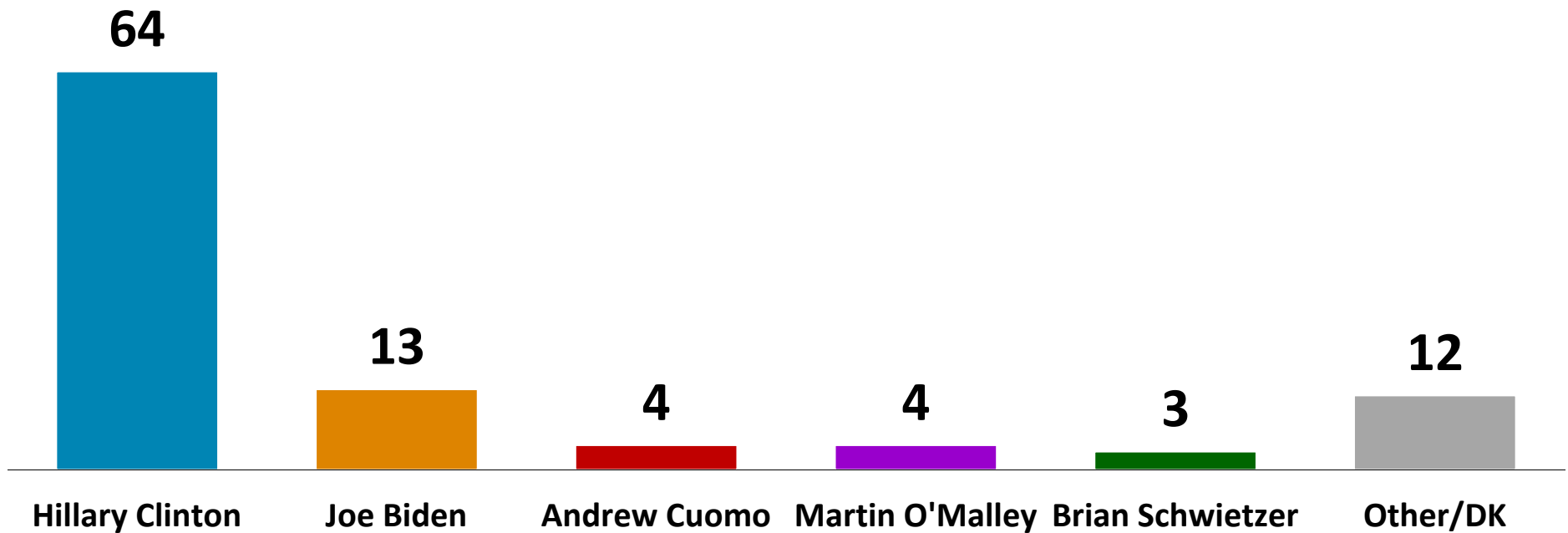
The battle for the Republican nomination remains wide open, with Rand Paul and Paul Ryan the early frontrunners. Rick Perry and Mike Huckabee show the strong support social conservatives will play in choosing the eventual nominee.

2016 Republican Primary



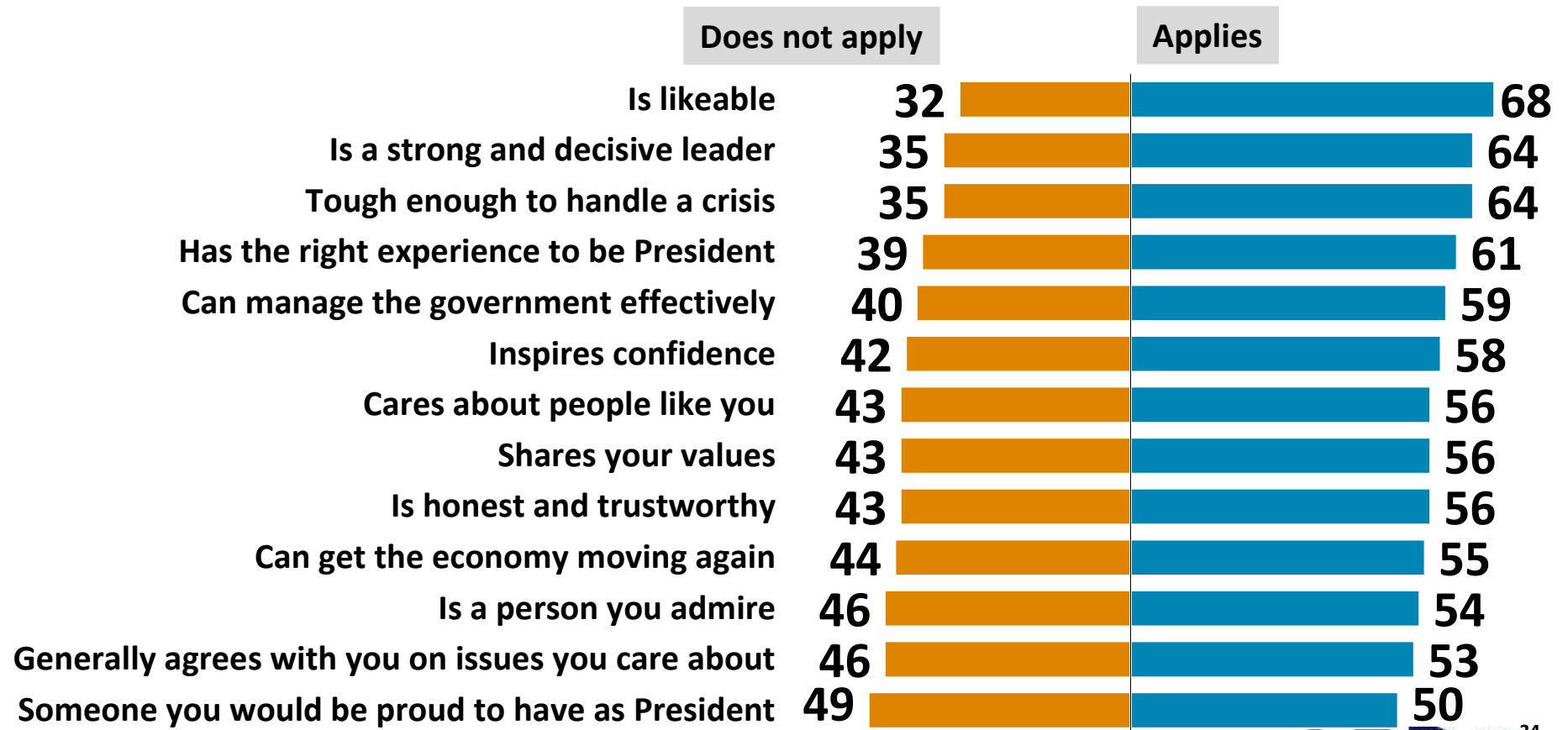
Should she choose to run, Hillary Clinton is the clear frontrunner for the Democratic nomination.

2016 Democratic Primary



Hillary Clinton performs strongly across a wide array of positive traits, drawing the strongest numbers for likeability, leadership abilities, and toughness – important criteria for women candidates.

Hillary Clinton Traits



Interviews with 801 adult Americans conducted by telephone by ORC International on March 7-9, 2014. The margin of sampling error for results based on the total sample is plus or minus 3.5 percentage points.

Q&A

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