2016 RECAP

n on behalf of :

I N OF REALTORS

ILLINOIS ASSOCIATION OF REALTORS®

GENE ULM • Partner

PUBLIC OPINION STRATEGIES

January 25, 2017

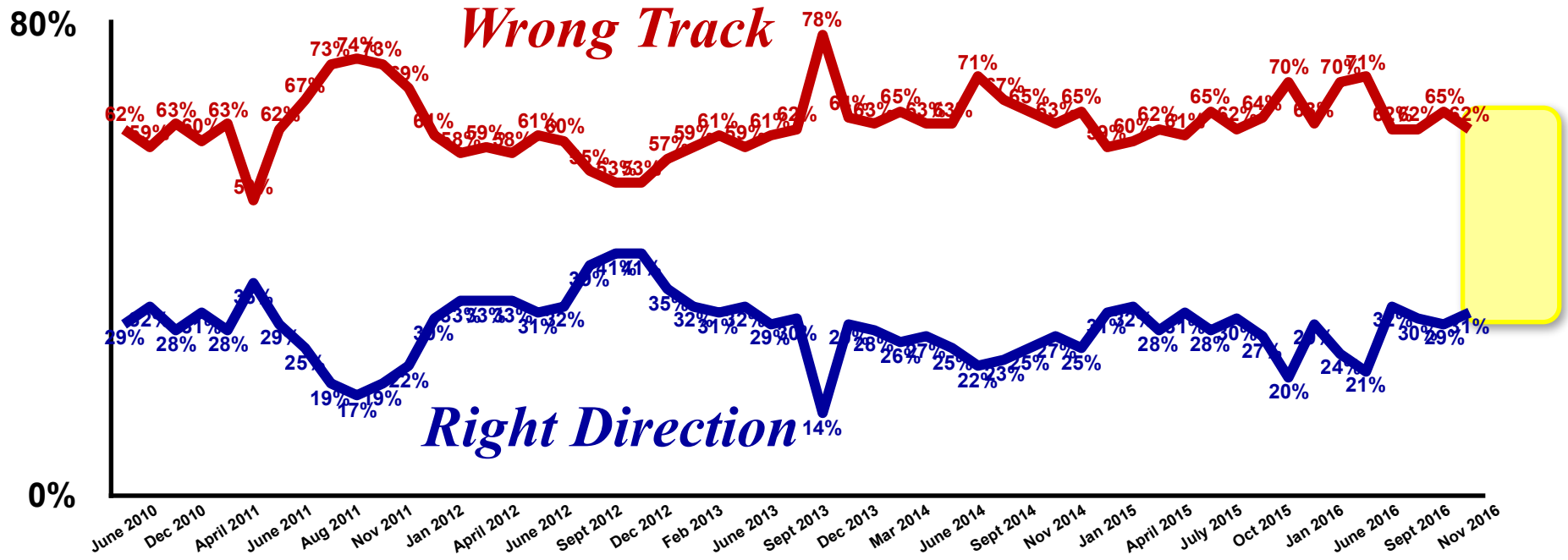
Keys to Understanding
the 2016 Election

The sustained negative mood of the country drove voter attitudes.

The Mood of the Country

Last Time Mood Was Positive:
154 Months Ago…
01/2004: 47% RD–43% WT

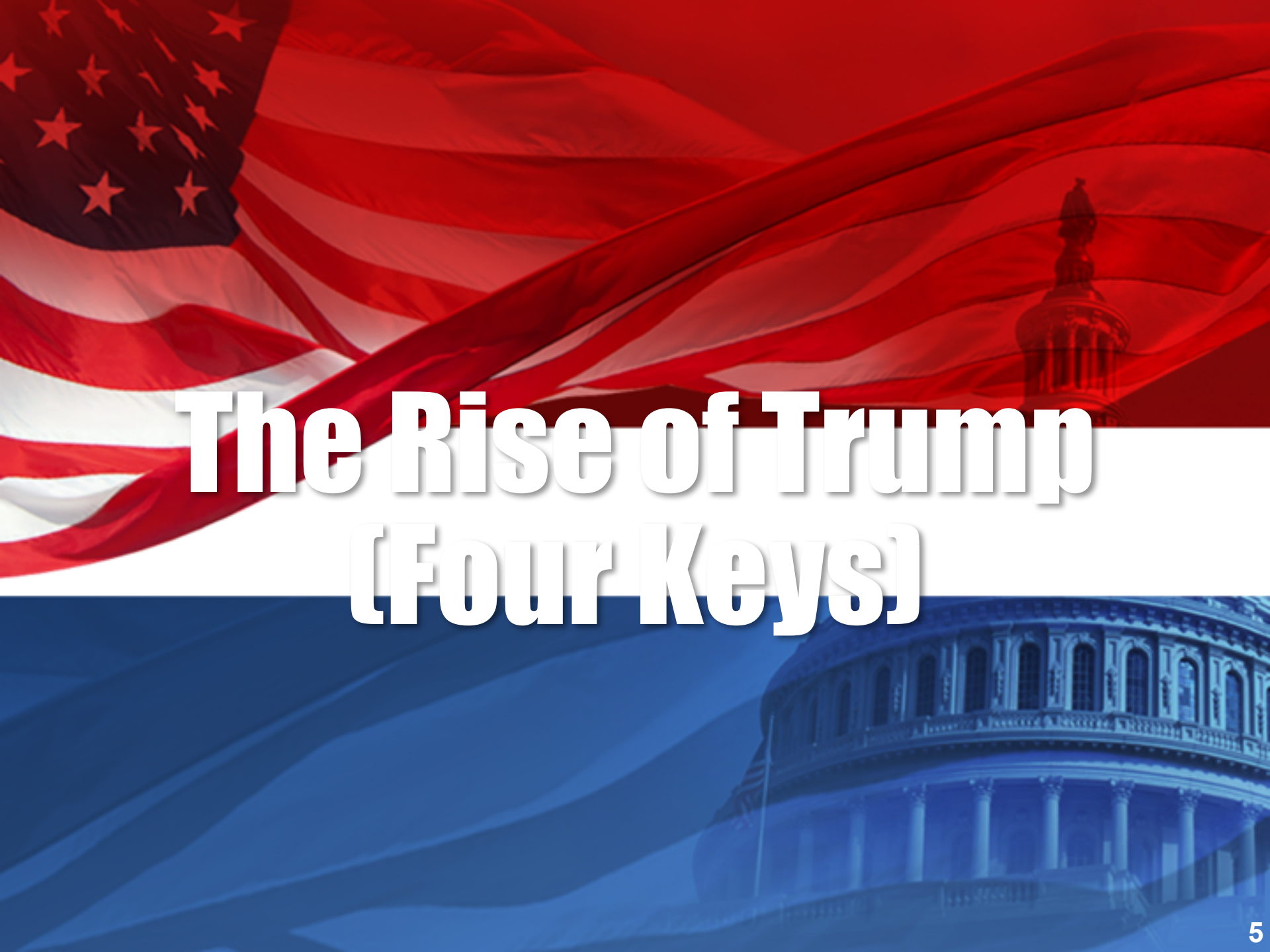
Rasmussen Reports 11/20 – 11/22: 30% - 58%
The Economist/YouGov 11/19 – 11/22: 24% - 60%
Reuters/Ipsos 11/18 – 11/22: 21% - 62%
NBC News/WSJ 11/03 – 11/05: 31% - 62%



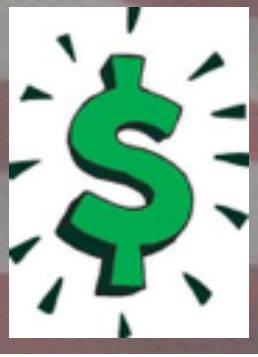
Trend data from monthly NBC News/Wall Street Journal polling of American adults.

It fueled a strong “time for a change” sentiment.

	2008	2016
Time for a Person Who Will Bring Greater Changes	54%	61%
Time for a More Experienced and Tested Person	42%	36%

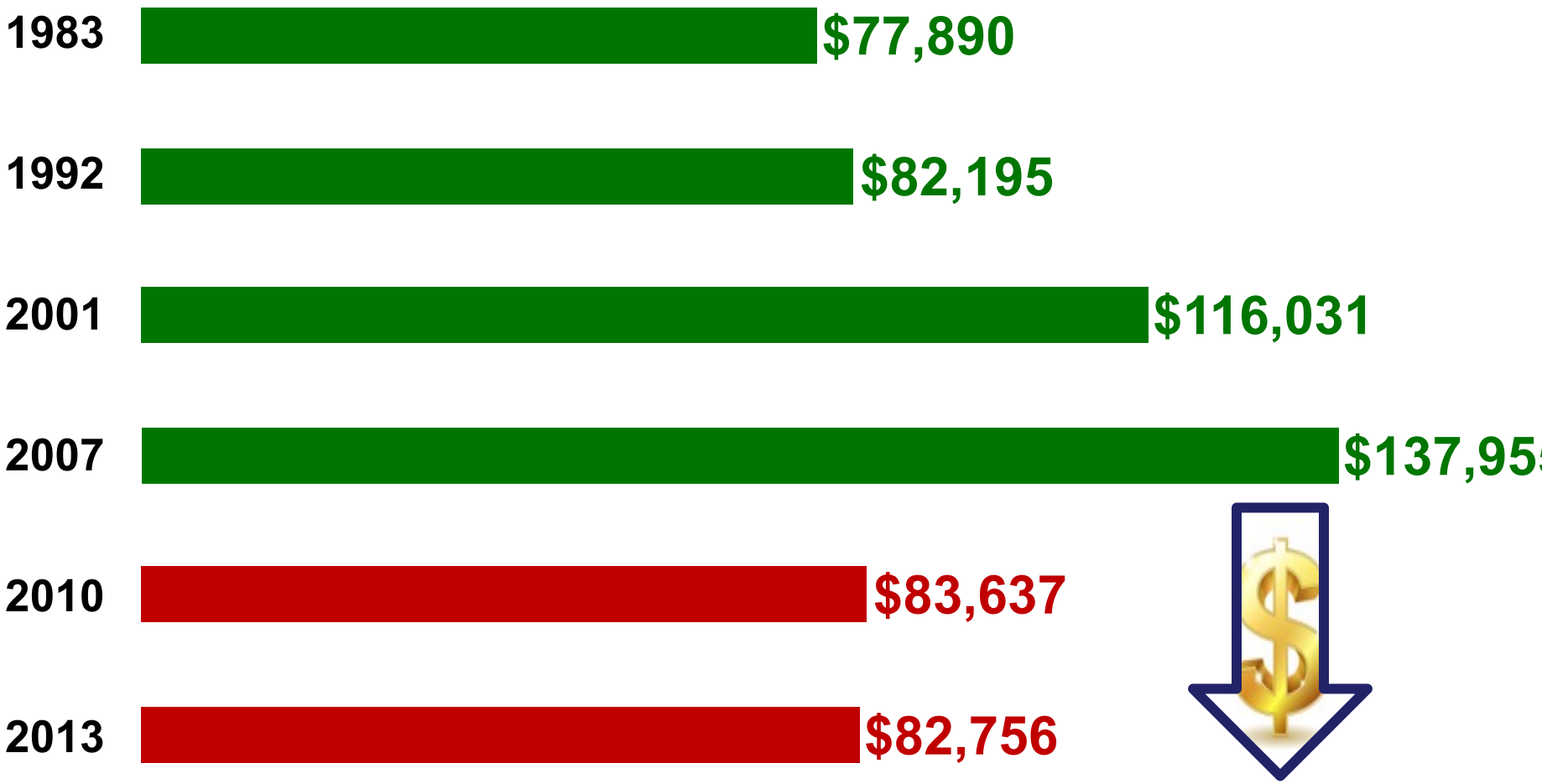

The Rise of Trump
(Four Keys)

#1: An Economic Hollowing Out



The wealth of US families has fallen sharply over the past decade.

The median net worth of families, in 2014 dollars.



Source: PEW Research, 12/9/2015

#2: An Epic Fail: Loss of Faith in Institutions

Thirty-one years of eroding confidence in institutions.

	1985	2016	D/S
Military	61%	73%	12%
The Criminal Justice System ('93)	17%	23%	6%
Small Business ('97)	63%	68%	5%
The Medical System ('93)	34%	39%	5%
The Police ('93)	52%	56%	4%
News on the Internet ('99 & '14)	21%	19%	-2%
Organized Labor	28%	23%	-5%
Big Business	32%	18%	-14%
Newspapers	35%	20%	-15%
The Presidency ('75)	52%	36%	-16%
US Public Schools	48%	30%	-18%
U.S. Supreme Court	56%	36%	-20%
Banks	51%	27%	-24%
Television News ('93)	46%	21%	-25%
The Church/Organized Religion	66%	41%	-25%
US Congress	39%	6%	-33%

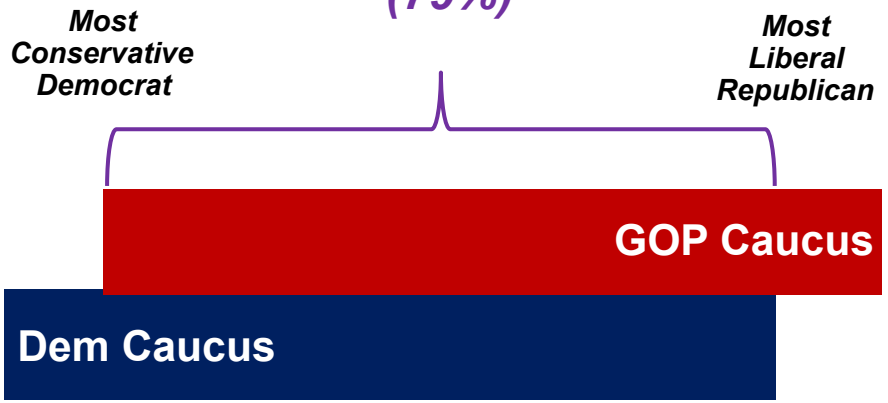
% refers to % of Americans who have "Quite A Lot/A Great Deal" of confidence in the institution.
Source: Gallup-Confidence in Institutions. June 1-5, 2016.

The Polarization of Congress

1982

Make-Up of House of Representatives:

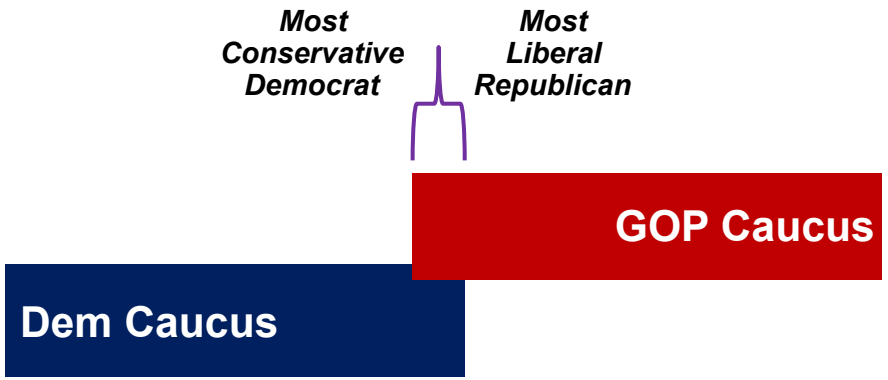
344 Members (79%)



2013

Make-Up of House of Representatives:

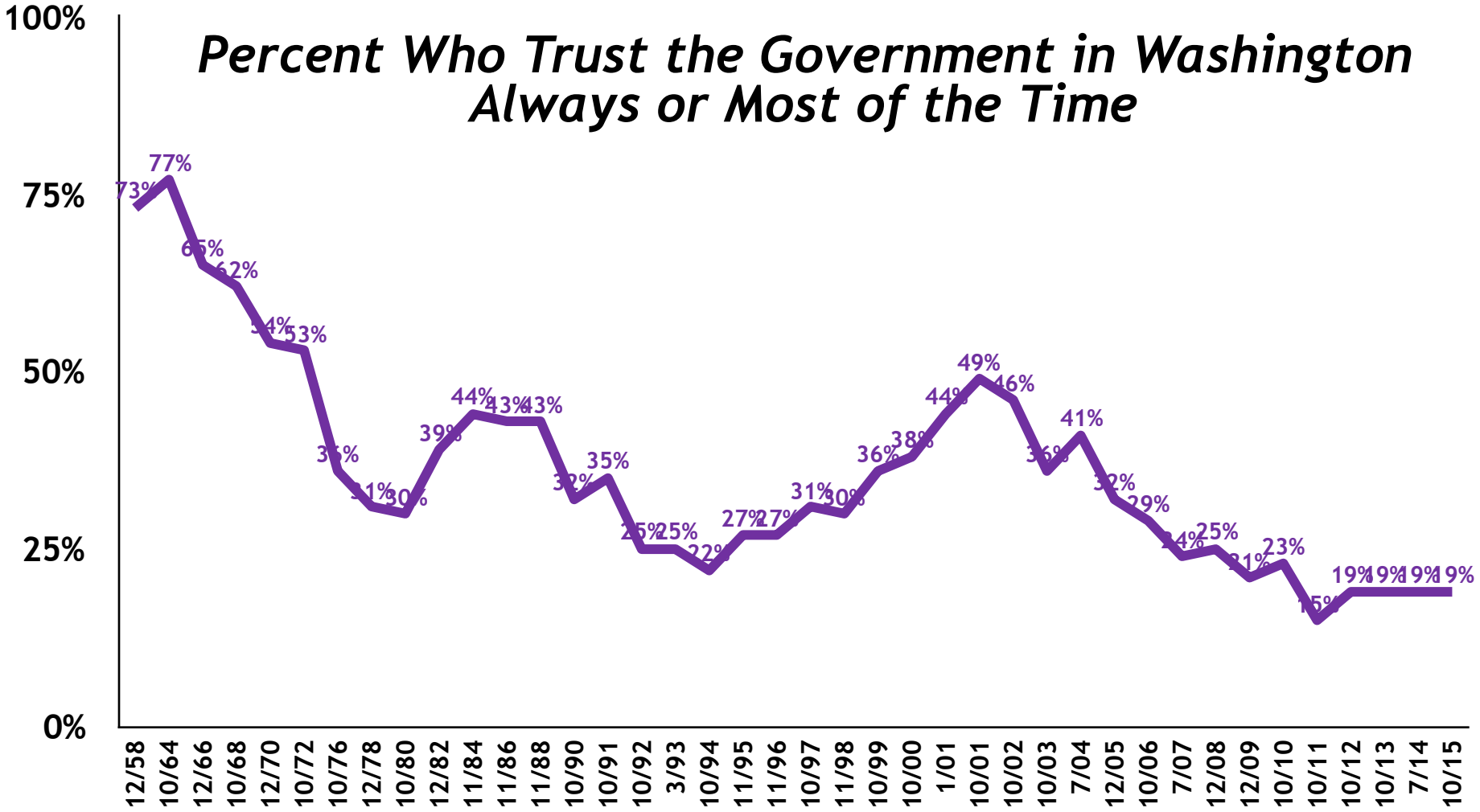
4 Members (1%)



Source: National Journal Vote Rankings from a presentation by Mehlman Vogel Castagnetti.

#3: A Well-Earned Anger at Washington

Trust in the federal government is near an all-time low.

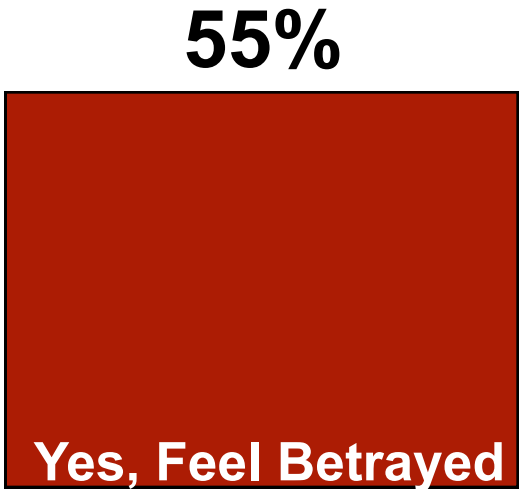


Trend data from Pew Research Center polling of American adults.

#4: Rise in anti-establishment sentiment

Both parties rebelled against the establishment.

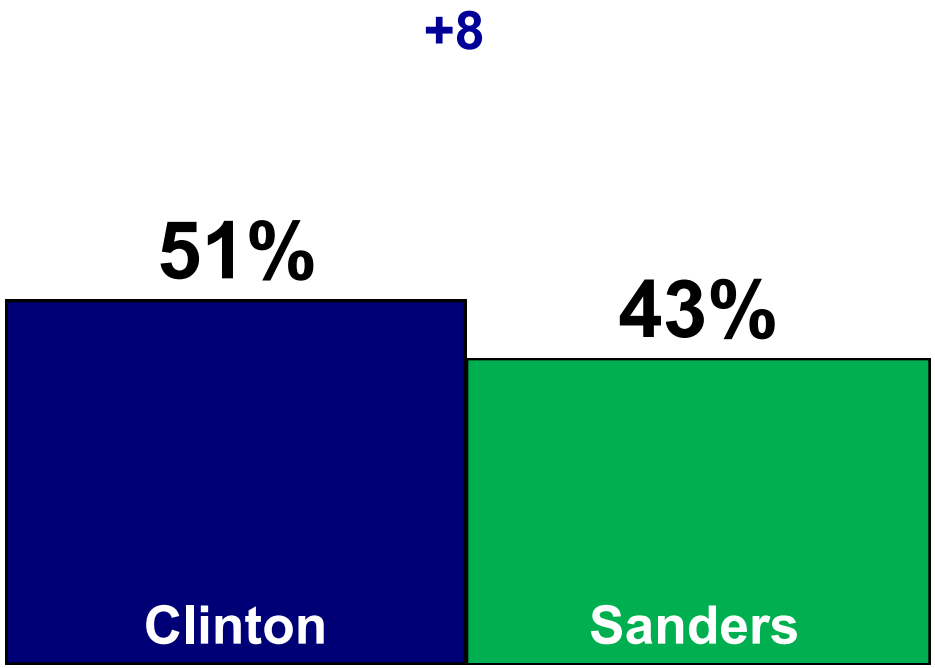
Would you say you feel betrayed by politicians from the Republican Party?



e of GOP Primary Exit Polls from 16 States*

Data from NBC News exit polls from GOP primaries in NE, FL, PA, MO, MI, NC, GA, OH, AR, VA, WI, SC, AL, IN, IL, WV.

Democratic Primary Ballot

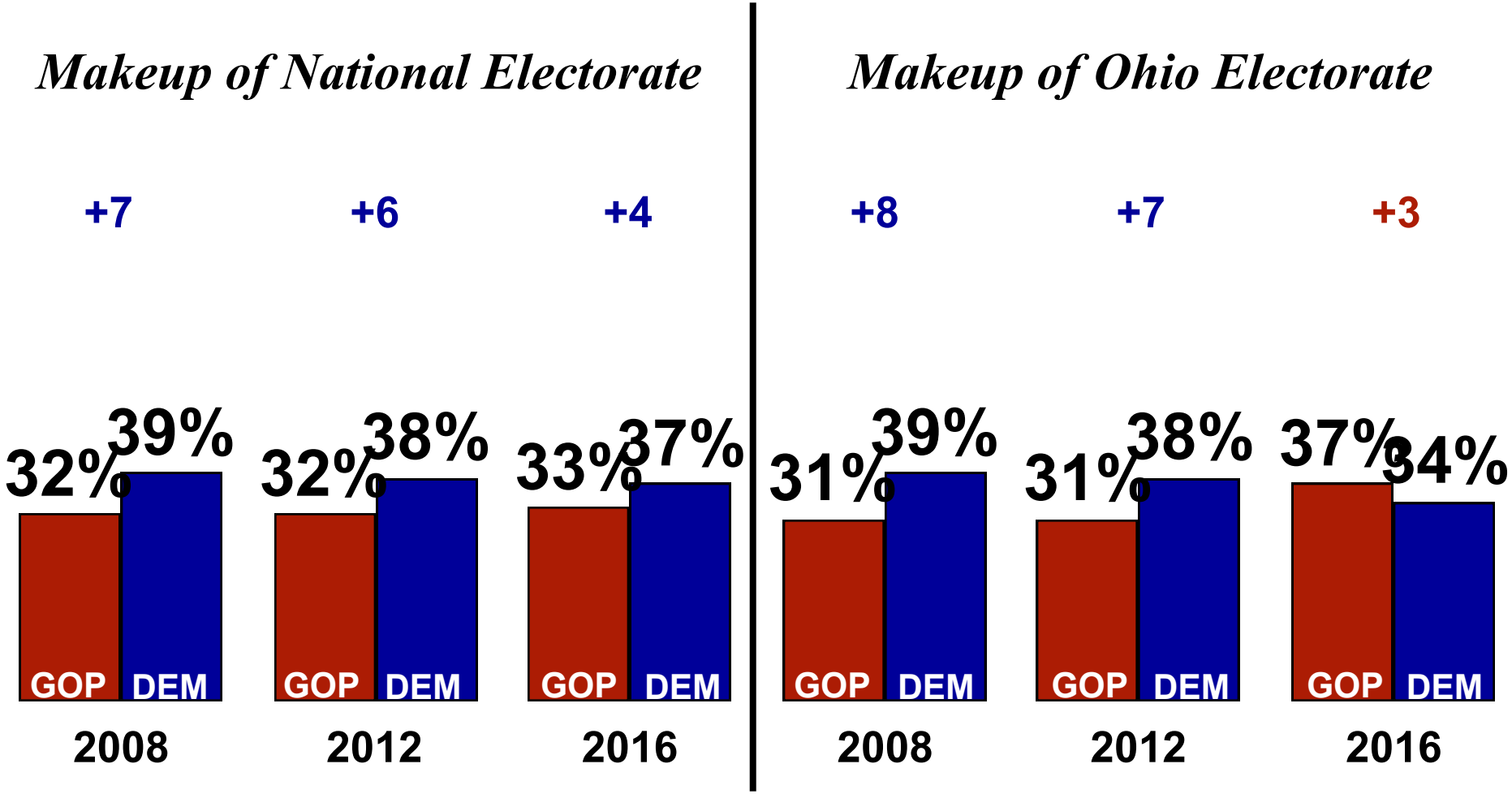


May 2016

Data from CNN surveys.

On November 8th…

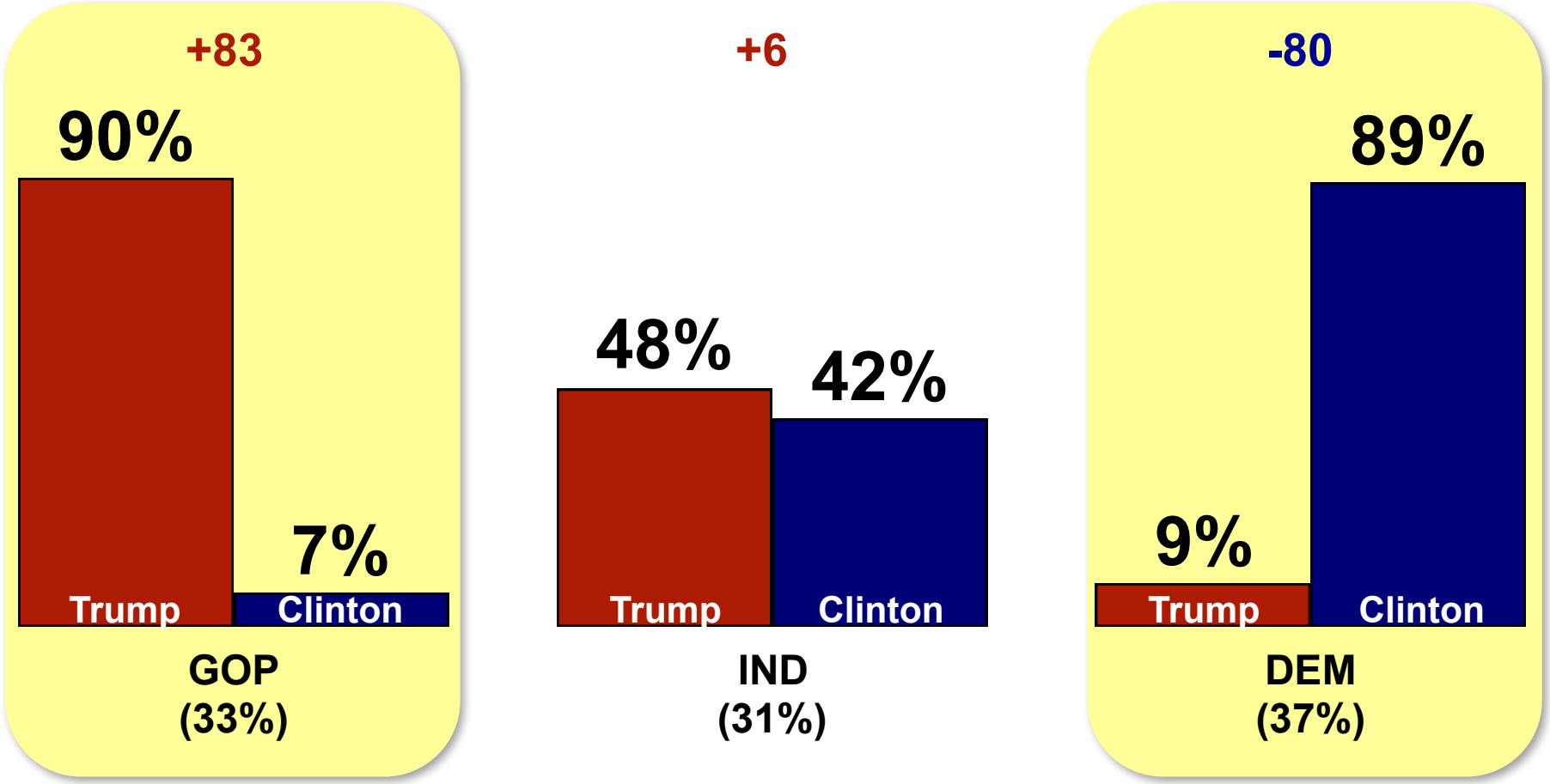
The ‘16 electorate was less tilted Hillary’s direction.



Data from CNN exit polls.

Republicans were stronger behind Trump than D's for Hillary.

Presidential Vote by Party



Data from CNN exit polls.

The Obama coalition was less committed to Hillary.

"DEM Voters" Less Pro-DEM in 2016 than 2012

Demographic	Asian Americans	Hispanics	Unmarried Women	African Americans	Millennials
Ballot Net Difference vs 2012	-11 points	-8 points	-7 points	-7 points	-5 points

*Source: National Exit Polls | *Estimated*

MEHLMAN CASTAGNETTI ROSEN & THOMAS

Trump margins went up with core parts of the Republican coalition.

"GOP Voters" More Pro-GOP in 2016 than 2012

Demographic	Non-College Whites	Small City or Rural	Evangelical Christians	Men
Ballot Net Difference vs 2012	+14 points	+8 points	+8 points	+5 points

Source: National Exit Polls

MEHLMAN CASTAGNETTI ROSEN & THOMAS

Education is the new cultural divide.

States Where More Voters Have Advanced Degrees Go DEM, Fewer GOP

State	% Advanced degree	Rank
District of Columbia	28.00%	
Massachusetts	16.40%	1
Maryland	16.00%	2
Connecticut	15.50%	3
Virginia	14.10%	4
New York	14.00%	5
Vermont	13.30%	6
New Jersey	12.90%	7
Colorado	12.70%	8
Illinois	11.70%	9
Rhode Island	11.70%	10
Delaware	11.40%	11
New Hampshire	11.20%	12
Washington	11.10%	13
California	10.70%	14
Oregon	10.40%	15
New Mexico	10.40%	16
Minnesota	10.30%	17
United States Average	10.30%	--
Kansas	10.20%	18
Pennsylvania	10.20%	19
Hawaii	9.90%	21
Georgia	9.90%	21
Maine	9.60%	23
Missouri	9.50%	24
Michigan	9.40%	25

State	% Advanced degree	Rank
Arizona	9.30%	26
Utah	9.10%	27
Alaska	9.00%	28
Florida	9.00%	28
Nebraska	8.80%	30
North Carolina	8.80%	31
Ohio	8.80%	32
Texas	8.50%	33
Kentucky	8.50%	33
Wisconsin	8.40%	35
South Carolina	8.40%	35
Montana	8.30%	37
Indiana	8.10%	38
Wyoming	7.90%	39
Tennessee	7.90%	39
Alabama	7.70%	40
Nevada	7.60%	41
Idaho	7.50%	42
Iowa	7.40%	43
Oklahoma	7.40%	43
South Dakota	7.30%	45
Mississippi	7.10%	46
Louisiana	6.90%	47
North Dakota	6.70%	48
West Virginia	6.70%	48
Arkansas	6.10%	50

Trump actually had a worse image than Hillary in the exit polling.

Image of Donald Trump

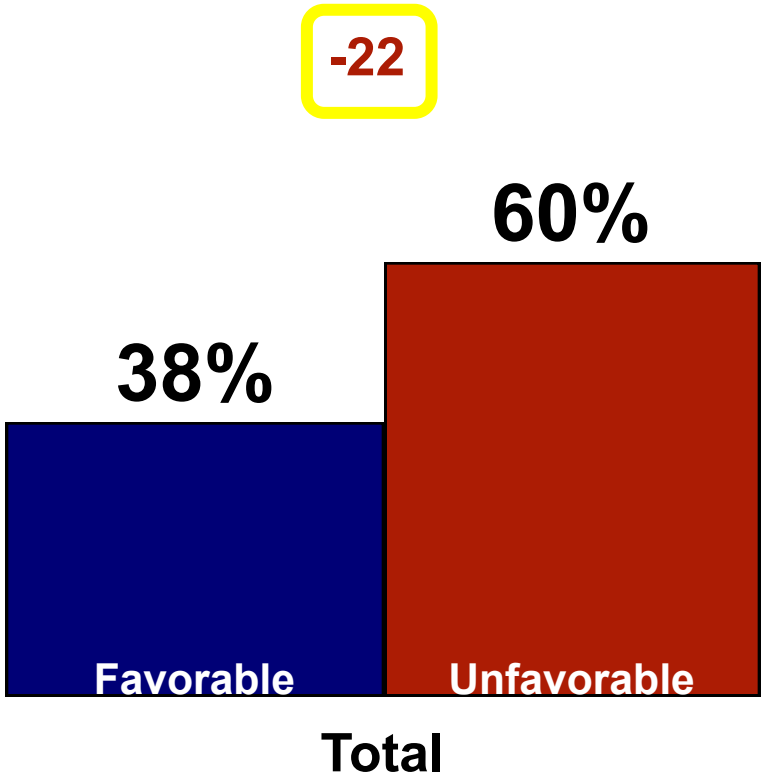
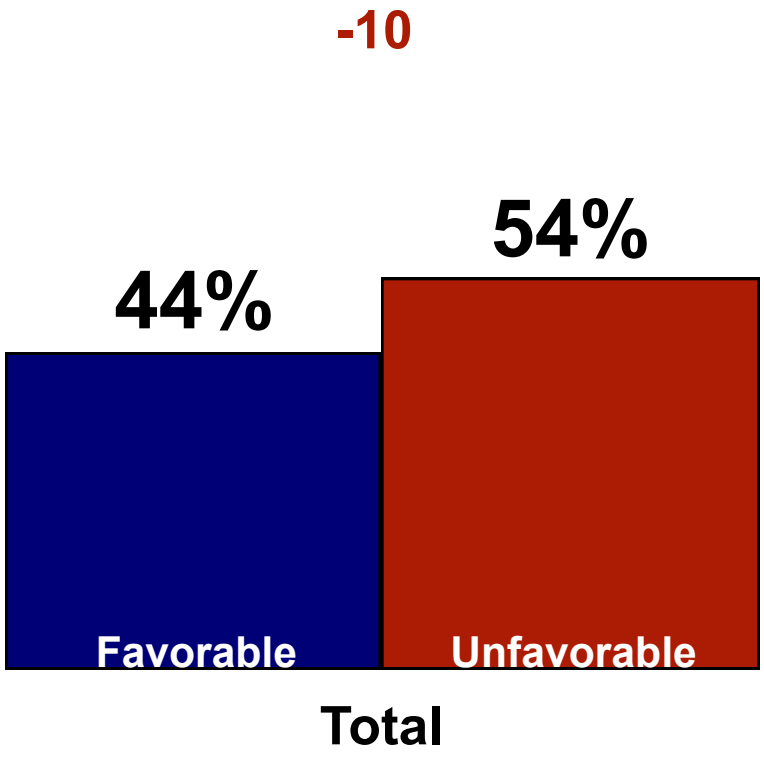


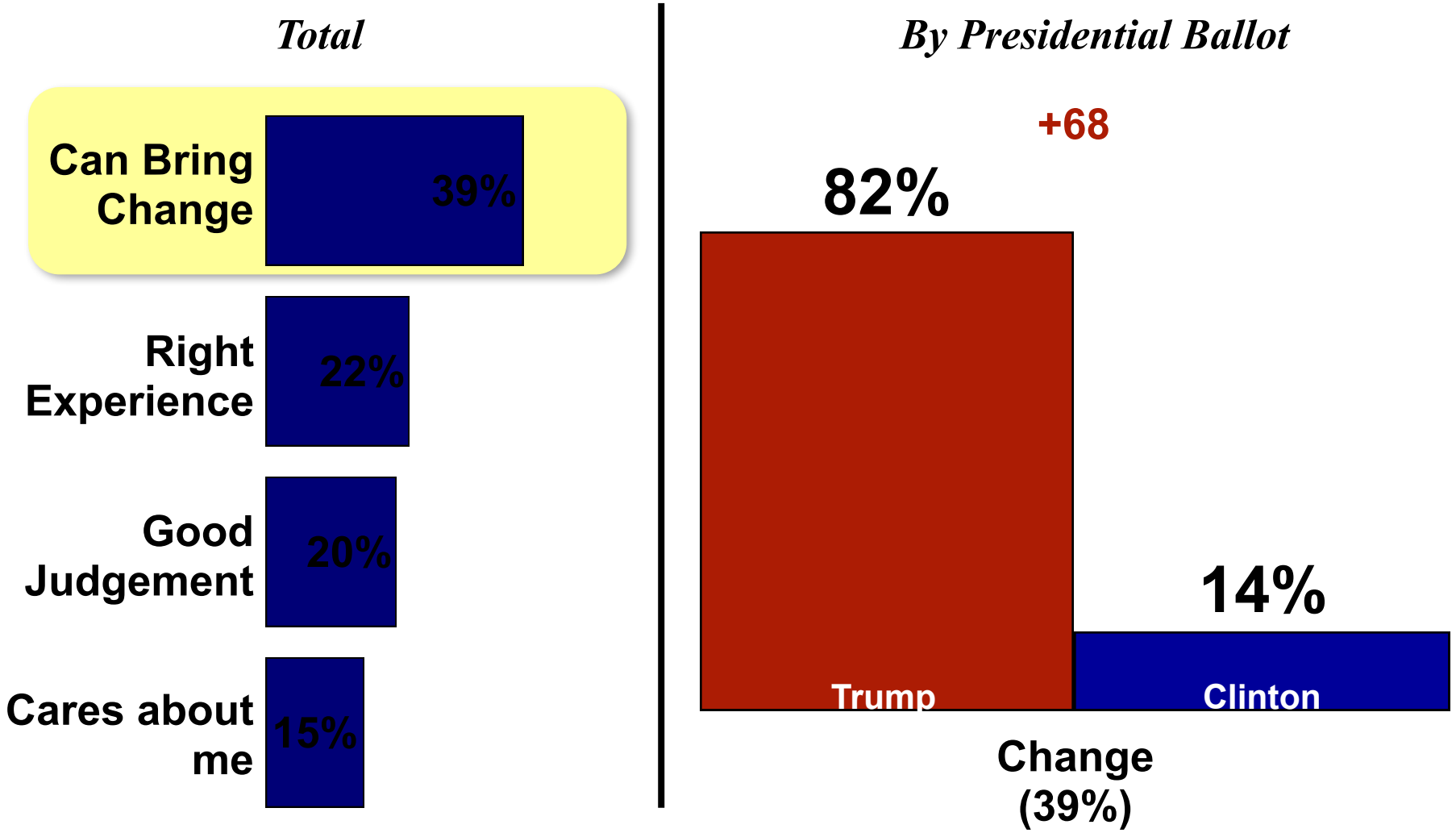
Image of Hillary Clinton



Data from CBS News exit polls.

But on what mattered the most, Trump won "bigly."

Which candidate quality mattered most?



Data from CNN exit polls.

Late deciders in key states broke decisively towards Trump.

Exit Poll: Among Voters Who Decided in the Last Few Days

	Late Deciders % of electorate	Clinton Vote Among Late Deciders	Trump Vote Among Late Deciders	Late Deciders in Exit Poll	Actual Election Results
National	8%	43%	43%	EVEN	+1.9
Wisconsin	10%	30%	57%	+27	+0.8
PA	10%	37%	53%	+16	+1.2
Michigan[1]	13%	39%	50%	+11	+0.3
Ohio	10%	42%	45%	+3	+8.6
Virginia[2]	14%	45%	42%	+3	+4.9

Data from NBC News/WSJ polls.

Trump narrowly won big, close states.

Electoral Votes in States Decided by 1.5 Points for Less

TRUMP		
Florida	+ 1.3%	29 EVs
Pennsylvania	+ 0.3%	20 EVs
Michigan	+ 0.3%	16 EVs
Wisconsin	+ 0.8%	10 EVs

TOTAL EVS: 75

CLINTON		
Minnesota	+ 1.5%	10 EVs
New Hampshire	+ 0.4%	4 EVs

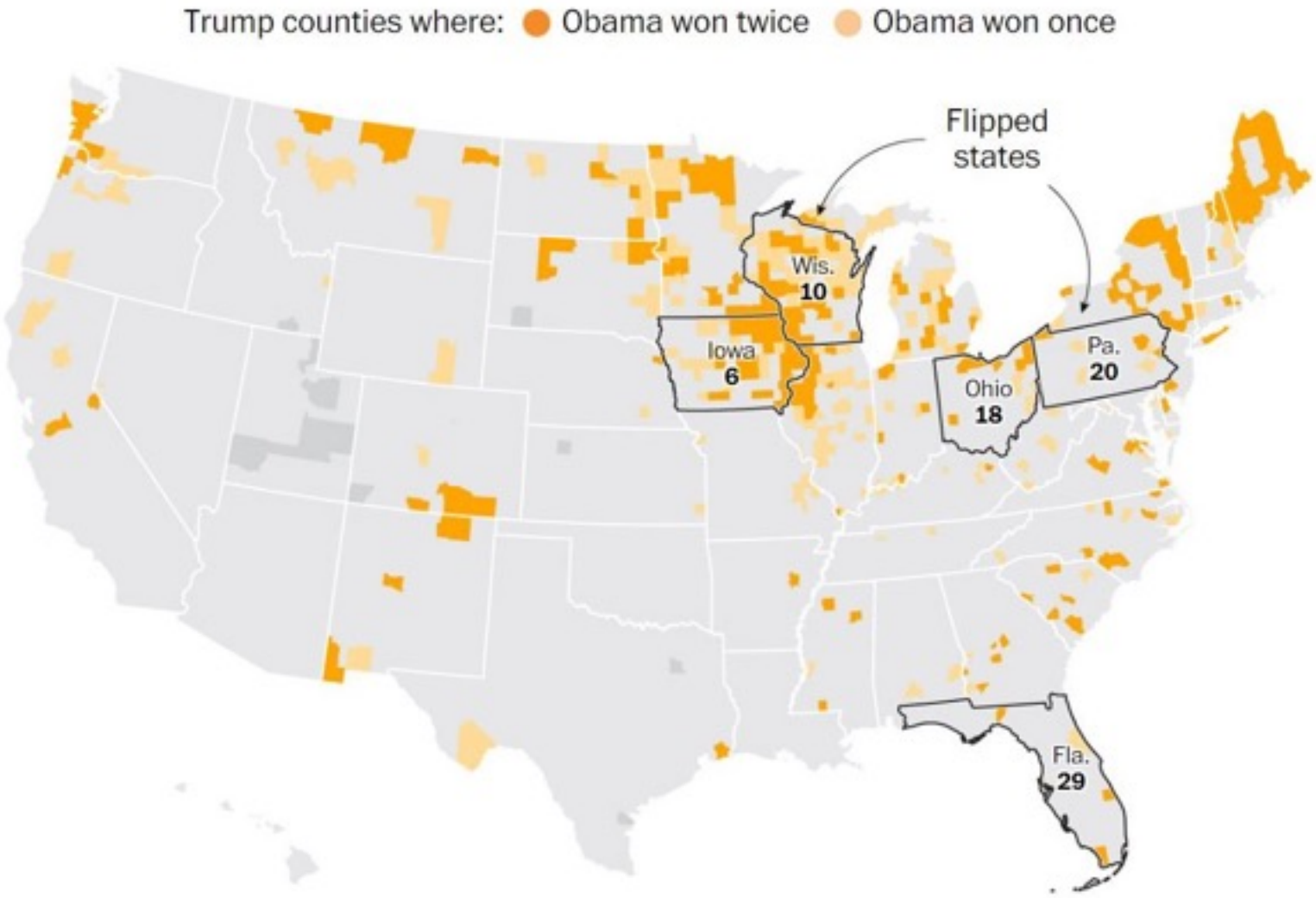
TOTAL EVS: 14

Data from CNN.com.

Turnout in base DEM counties in swing states dropped significantly.

State	County	2012 Turnout	2016 Turnout	D/S
WI	Milwaukee	87%	77%	-10%
WI	Dane	84%	81%	-3%
NC	Wake	81%	72%	-9%
NC	Durham	68%	65%	-3%
MI	Wayne	59%	56%	-3%
OH	Cuyahoga	66%	65%	-1%

Trump won 209 out of 676 counties (31%) that voted for Obama twice.



Source: AP, Washington Post

The Message Trump Voters Sent

"Borrowed" from Peter Hart

✓ ***Security*** - we live in a country that cannot secure its borders; the war against terrorism is never-ending, and it has come ashore.

✓ ***Anger with the Elite*** - Journalists mock us; comedians make fun of us; the rich use us, we're not going to take it anymore.

✓ ***The Economy*** - we're still in debt; wages are not growing and our standard of living is declining; student loans are killing us; ObamaCare may work for some, but not us.

✓ ***Understand Us*** - we go to 7-11, not Starbucks, we don't listen to NPR or vacation in Hawaii; we care more about high school sports, we eat at KFC, shop at Walmart, fish and hunt.

We want our country back!

What this means for
the next two years...

Populism is the new normal.

Skepticism Towards "Big Business"

More aggressive oversight

Tougher Antitrust Oversight

Anti-Crony Capitalism Meets Too Big To Fail

OCCUPY

TEA PARTY

Globalization "Re-Think"

More aggressive trade enforcement

Tougher reviews of in-bound M&A

Existing Relationships at Risk

Push for Systemic "Reforms"

Alternative media empowered

BREITBART

DAILY KOS

"Tax-the-rich" / Fair Share

HEDGE FUNDS

Restrict Lobbying by ex-Members

MEHLMAN CASTAGNETTI ROSEN & THOMAS

Areas Ripe for Significant Legislation in 2017

Tax Reform (repatriation) + Infrastructure

Securing the Borders / Legal Immigration

Trade Enforcement

Repeal & Replace ACA

Domestic Energy Production

Telecom Act Modernization & Cyber

Debt Ceiling / Sequestration Relief

Dodd-Frank Reform

Mehlman Castagnetti Rosen & Thomas

The GOP "owns" the government.

Now what?

Gene Ulm

Partner • gene@pos.org

PUBLIC OPINION STRATEGIES

214 North Fayette Street
Alexandria, Virginia 22314
Phone: (703) 836-7655
Web: www.pos.org