

MEMORANDUM

TO: Interested Parties
FROM: John Nienstedt and Jenny Holland, Ph.D.
RE: Results of Final 2018 Pre-Primary California Gubernatorial Poll
DATE: June 1, 2018

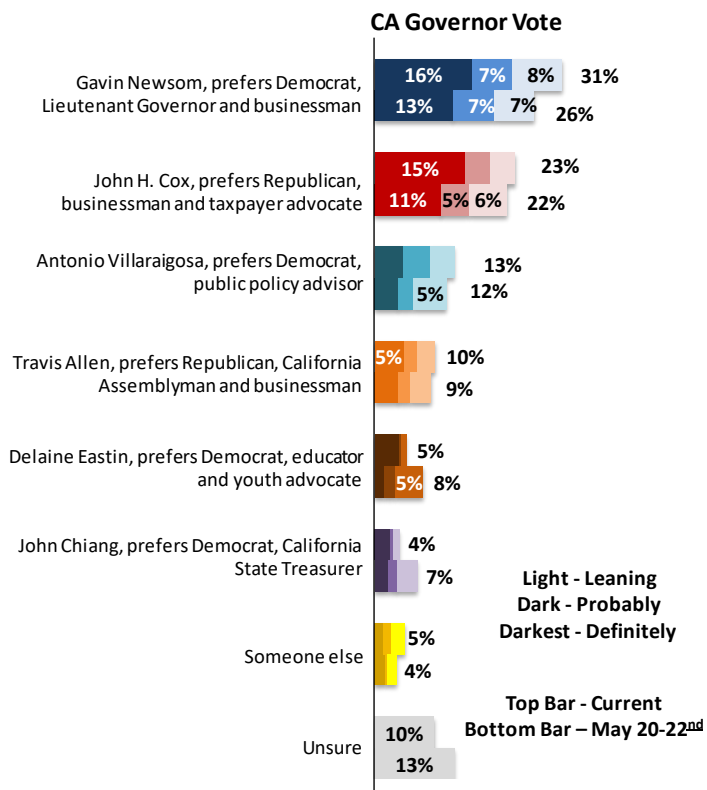
This analysis is based on the results from our poll of 504 randomly-sampled likely California June primary voters which we fielded May 29 through 30. The turnout model reflects 30% participation in the June primary election. The margin of sampling error is +/-4.4% at the 95% confidence level. Interviews were conducted by trained professionals from our offices in El Paso, TX, and via e-mail. Our initial poll was conducted May 20 to 22.

Summary

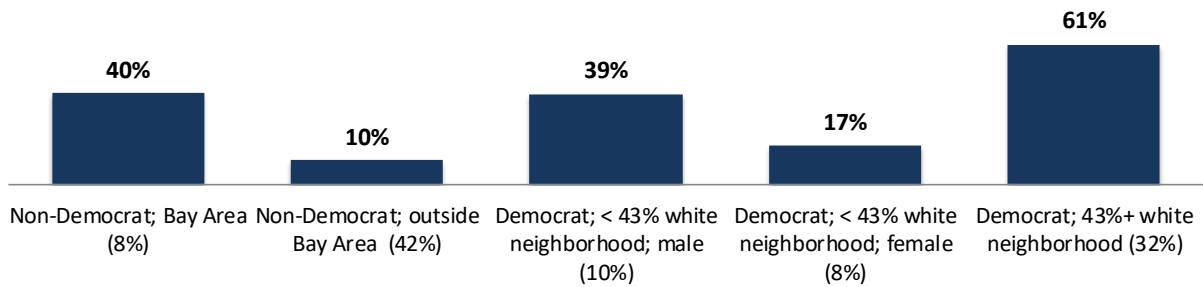
Lieutenant Governor Gavin Newsom easily maintains his leading position in the campaign’s final week. Reinforcing last week’s Competitive Edge poll findings, Newsom will face Republican businessman John Cox in November’s general election, barring their complete collapse. Support for both candidates is holding steady and remains strong. Former Los Angeles Mayor Antonio Villaraigosa and Republican Assemblyman Travis Allen remain locked in a battle for third place. Educator Delaine Eastin and State Treasurer John Chiang still trail the rest of the field, with the latter losing ground in the last week. Ten percent of likely voters remain undecided with less than a week left in the campaign, making chances of a second-tier candidate closing the gap very slim.

Analysis

Newsom’s performance is solid among Democrats, as nearly half are casting their vote for him. He performs best with Democrats in heavily white neighborhoods, garnering 61% of their vote. The former San Francisco mayor also makes a strong showing among Bay Area *non-Democrats*, earning 42% of their support. Of course, Newsom does poorly among Republicans outside the Bay Area (65% of Republicans across the state strongly dislike him), but Newsom is also relatively weak with Democratic women living in heavily minority areas, capturing only 17% of their vote. Looking ahead to a runoff in which Cox will need everything to go right, lack of enthusiasm for Newsom within this segment should give the Republican hope for weak turnout in normally reliable Democratic segments.



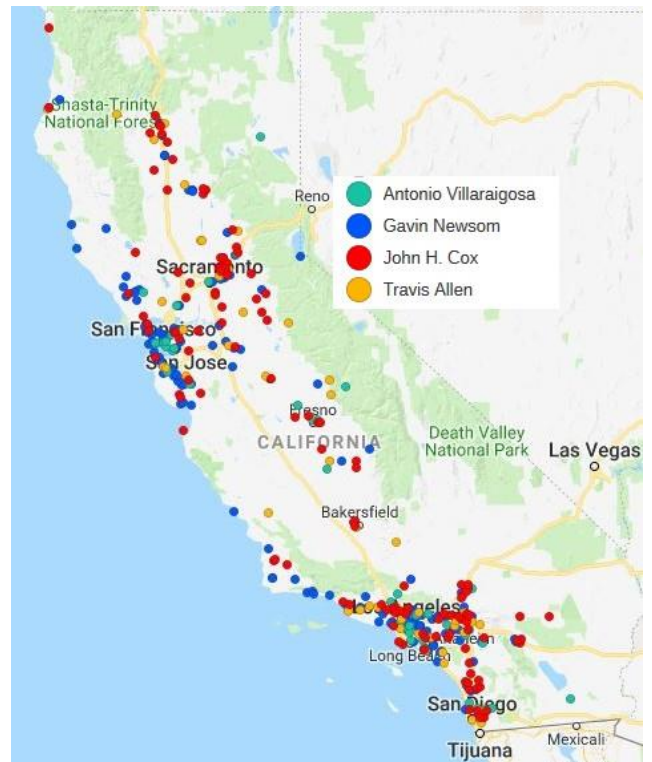
Newsom Vote by Party/Area/Neighborhood/Gender



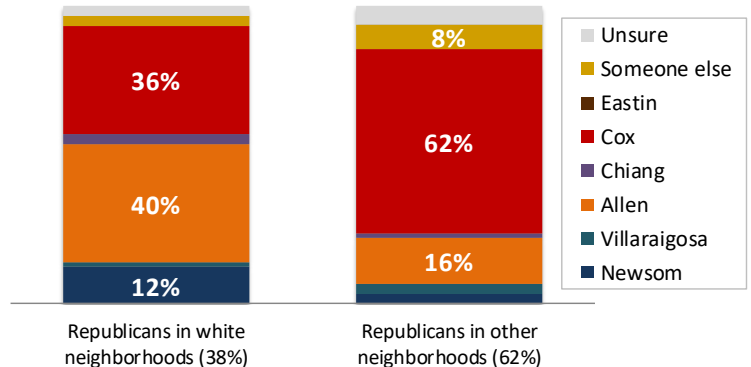
Like Newsom, Cox is strongest with his partisans, as more than half of Republicans side with the businessman. This increases to 62% in areas where whites comprise three-quarters or less of the population. The area-based difference here is largely explained by Allen's strong appeal in heavily white areas. Cox also picks up 35% of the non-partisans in Los Angeles and the Inland Empire, competing for votes in Villaraigosa's backyard. Outside this region, Cox garners a modest 12% of the vote from non-partisans and only 3% from Democrats. Another forward-looking positive for Cox is that Democrats and non-partisans do not dislike him. Unlike, Newsom, Cox is simply unknown by those outside his party.

Villaraigosa's name recognition has increased since last week, though his vote share has not. He still struggles to win votes on his home turf, performing no better in Los Angeles County than other candidates. As in Competitive Edge's initial poll, Villaraigosa performs well in heavily minority neighborhoods, particularly with women, as 42% are voting for him. His biggest fans are women in less-educated communities. Unfortunately for Villaraigosa, his appeal elsewhere is limited, and he gets no love from Republicans.

Allen is slipping under the radar and has lost ground during the past week in terms of how the electorate views him. While 17% of the voters previously viewed Allen favorably, that percentage has now shriveled to 6%. Opposite Cox, Allen earns 45% of the Republican vote in very heavily white areas, but gets trounced among GOP voters in the state's less white areas. Among non-Republicans, he's made a dent using social media, as 13% receiving campaign information through this medium are voting for Allen.



Vote Among Republicans by Neighborhood Type



Eastin has become more well-known in the last week, but not more well-liked. She has a base of support in Alameda County, parts of which Eastin represented in the state legislature. She even has a school named for her, and Eastin's roots explain why she gets one-third of the vote in the county. Elsewhere, she, like Allen, has made some gains via social media, but that has not been enough to make her competitive.

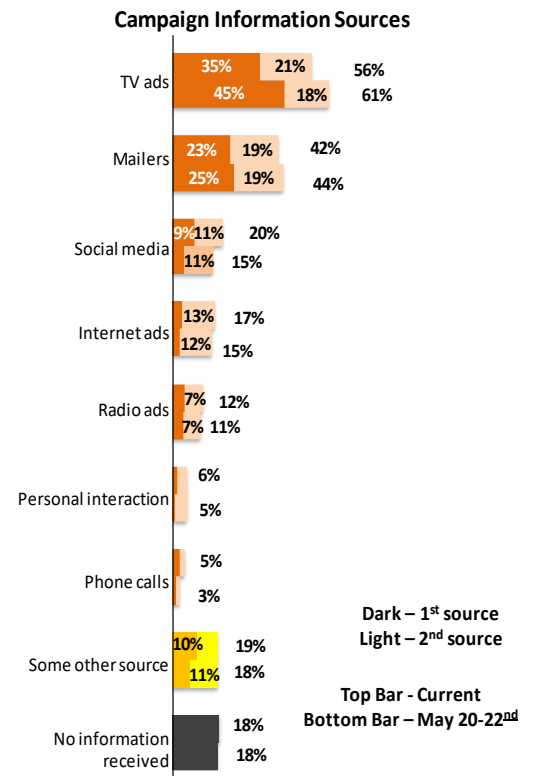
Despite an increase in name recognition in late-May, impressions of Chiang have been a mixed bag for him. He's the only candidate who's vote share has moved significantly since last week and it has taken a step back. Not only has Chiang's support declined, he is not connecting with any specific segments – including voters in more Asian neighborhoods.

Undecided voters are increasingly short supply. Voters younger than 32 continue to equivocate on their choice, but the rest of the electorate is generally settled.

TV advertising continues to be the main way voters receive campaign information in the governor's race. Mail pieces are another widely used communication tool. Social media has increased slightly as a campaign information source in the campaign's closing days. Fifteen percent mentioned it as a source of campaign information earlier and that has increased to 20%. Ads on the internet and radio also account for small, but significant, pieces of the communication pie.

Early votes continue to come in at a steady rate. Twenty-four percent of our likely voter sample has already cast a ballot, significantly more than the 15% a week ago. Competitive Edge's turnout model estimates about 26% of all registrants will participate in this election.

Despite national conversations that Democrats are more motivated to vote, this poll indicates partisanship and vote enthusiasm are disconnected. Democrats and non-partisans are no more (or less) enthused about voting in this June's California primary than are Republicans.



California Governor 2018 Primary Final Poll

n=504 California voters

Turnout model: 30%

Margin of sampling error +/- 4.4%

May 29-30, 2018

Weighted on vote history, survey mode, age, party, gender, and area

Hello is ____ there? Hi this is ____ with Competitive Edge Research, a national polling firm and we're calling the good folks of California to ask your opinion on local issues. We are not selling anything. Most people find it interesting and all your answers will be kept strictly confidential. Please let me begin by asking...

Q1. For one reason or another, not everyone votes in all elections. In June's election...

	%
Have you already voted	24.1
Are you absolutely certain to vote	60.3
Probably going to vote	10.6
May or may not vote depending on what's happening at the time	3.9
Unsure (<i>Not read</i>)	1.1

I'm going to read you some names of businesses, institutions and people. Please tell me whether you have heard of them and, if so, whether your impression of them is favorable or unfavorable. (Q2-Q7 were randomized)

	Very Fav %	Some Fav %	Some Unfav %	Very Unfav %	Heard Uns %	Not Heard %	REF %
Q2. Businessman John Cox (<i>n=169</i>)	10.7	9.4	10.5	4.6	19.5	45.3	0.0
Q3. State Assemblyman Travis Allen (<i>n=162</i>)	2.2	3.0	1.9	2.2	22.5	68.1	0.2
Q4. Former California state superintendent of public instruction Delaine Eastin (<i>n=172</i>)	5.2	10.1	8.2	5.1	15.6	55.8	0.0
Q5. Lieutenant Governor Gavin Newsom (<i>n=172</i>)	18.6	19.3	7.3	22.8	15.1	16.8	0.0
Q6. Former Los Angeles Mayor Antonio Villaraigosa (<i>n=164</i>)	11.6	20.5	11.0	18.1	25.2	12.9	0.6
Q7. State Treasurer John Chiang (<i>n=166</i>)	7.3	27.4	6.3	3.1	18.7	37.2	0.0

Q8a. And if the election for Governor were held today, which of the following candidates will you vote for? (*candidates were randomized*)

	%
Gavin Newsom, prefers Democrat, Lieutenant Governor and businessman	25.5
John H. Cox, prefers Republican, businessman and taxpayer advocate	20.3
Antonio Villaraigosa, prefers Democrat, public policy advisor	11.5
Travis Allen, prefers Republican, California Assemblyman and businessman	8.8
Delaine Eastin, prefers Democrat, educator and youth advocate	4.3
John Chiang, prefers Democrat, California State Treasurer	2.6
Or are you voting for someone else	4.9
Unsure (<i>Not read</i>)	22.0

Q9a. And are you... (*of those who selected a candidate in Q8a, n=257*)

	%
Definitely voting for that candidate	41.0
Probably voting for that candidate	31.2
Or only leaning towards that candidate	23.6
Unsure (<i>Not read</i>)	4.3

Q10a. And which candidate are you leaning towards? (asked of those "Unsure" on Q8A, n=91)

	%
Gavin Newsom, prefers Democrat, Lieutenant Governor and businessman	17.6
Antonio Villaraigosa, prefers Democrat, public policy advisor	8.5
John H. Cox, prefers Republican, businessman and taxpayer advocate	5.6
Delaine Eastin, prefers Democrat, educator and youth advocate	5.1
Travis Allen, prefers Republican, California Assemblyman and businessman	2.7
John Chiang, prefers Democrat, California State Treasurer	2.5
Unsure/Did not vote on this office (Not read)	58.1

Q8b. And in the Governor's race, which of the following candidates did you vote for? (asked of those who already voted on Q1, n=156)

	%
Gavin Newsom, prefers Democrat, Lieutenant Governor and businessman	34.1
John H. Cox, prefers Republican, businessman and taxpayer advocate	26.7
Antonio Villaraigosa, prefers Democrat, public policy advisor	12.2
Travis Allen, prefers Republican, California Assemblyman and businessman	11.0
John Chiang, prefers Democrat, California State Treasurer	6.5
Delaine Eastin, prefers Democrat, educator and youth advocate	4.7
Or did you vote for someone else	4.8

Primary Vote

	%
Gavin Newsom, prefers Democrat, Lieutenant Governor and businessman	30.5
John H. Cox, prefers Republican, businessman and taxpayer advocate	22.8
Antonio Villaraigosa, prefers Democrat, public policy advisor	13.1
Travis Allen, prefers Republican, California Assemblyman and businessman	9.8
Delaine Eastin, prefers Democrat, educator and youth advocate	5.3
John Chiang, prefers Democrat, California State Treasurer	3.9
Someone else	4.9
Unsure	9.7

Q11. And thinking only about information you may have received from the campaigns for Governor, which of the following have you seen, read or heard the most from?

	%
TV ads	34.8
Mailers	23.1
Social media	8.9
Radio ads	5.0
Internet ads	4.4
Phone calls	2.8
Personal interaction	1.9
Or some other source	9.5
No information received (Not read)	6.7
Unsure (Not read)	3.0

Q12. Which of the remaining has been your secondary source of information? (n=455)

	%
TV ads	23.2
Mailers	20.9
Internet ads	14.1
Social media	12.3
Radio ads	8.2
Personal interaction	3.9
Phone calls	2.2
Or some other source	9.8
No other information received (<i>Not read</i>)	3.1
Unsure (<i>Not read</i>)	2.1
Refused (<i>Not read</i>)	0.2

Total Source of Information

	%
TV ads	55.7
Mailers	42.0
Social media	20.0
Internet ads	17.2
Radio ads	12.4
Personal interaction	5.4
Phone calls	4.8
Some other source	18.4

Q13. And do you think California should be a sanctuary state, which means law enforcement personnel holding suspected [2-WAY SPLIT] illegal aliens/undocumented immigrants would be limited in the help they can give federal immigration officials, or do you think California should not be a sanctuary state?

(Results redacted)

Thanks. I have just a few demographic questions to make sure we have a representative sample.

Q14. Is voting this June more important to you than in previous June elections, less important or about the same?

	%
Much more important	32.7
Somewhat more important	5.9
Less important	2.3
About the same	58.3
Unsure (<i>Not read</i>)	0.8

Q15.	In what year were you born?		%
	18-24		5.5
	25-34		8.9
	35-44		10.9
	45-54		14.7
	55-64		18.7
	65-74		21.7
	75+		19.6
	Average		58.2
Q16.	And were you born in . . .		%
	California		46.0
	Somewhere else in the U.S.		42.3
	In a foreign country		11.7
17.	GENDER		%
	Male		47.8
	Female		52.2
18.	PARTY		%
	Democrat		48.0
	Republican		30.5
	NPP		15.8
	Other Party		5.7
19.	TURNOUT HISTORY		%
	New/Unreliable		6.9
	Reliable		42.6
	Very reliable		50.4
20.	PERMANENT ABSENTEE VOTER		%
	Yes		61.7
	No		38.3
21.	RESIDENCE TYPE		%
	Home		86.3
	Apartment		13.7

22.	LENGTH OF REGISTRATION		
			%
	2015 to Present		34.1
	2008 to 2014		18.5
	2000 to 2007		16.0
	Before 2000		31.4
	Average		2004
23.	# OF VOTERS IN HOUSEHOLD		
			%
	1		22.1
	2		42.4
	3		20.6
	4		14.8
24.	LATINO SURNAME		
			%
	Yes		14.9
	No		85.1
25.	% OF ASIANS IN PRECINCT		
			%
	0		17.8
	1-3		22.5
	4-10		26.7
	11-20		18.1
	>20		14.9
	Average		10.1
26.	% OF AFRICAN AMERICANS IN PRECINCT		
			%
	0		36.9
	1		10.3
	2		9.1
	3-10		30.2
	>10		13.5
	Average		5.5
27.	% OF WHITES IN PRECINCT		
			%
	0-30		18.1
	31-60		32.3
	61-70		11.8
	71-80		14.1
	>80		23.7
	Average		57.0

28. % WHITE-COLLAR PROFESSIONALS IN PRECINCT

	%
0-50	21.1
51-60	14.5
61-70	20.0
71-80	21.2
>80	23.2
Average	65.6

29. % COLLEGE GRADUATES IN PRECINCT

	%
0-10	18.9
11-20	29.0
21-30	27.3
31-40	18.1
>40	6.7
Average	21.7

30. MEDIAN INCOME IN PRECINCT

	%
<\$40K	12.8
\$40-\$60K	25.7
\$61-\$80K	19.9
\$81-\$100K	16.7
>\$100K	25.0
Average	\$80,200