

MEMORANDUM

TO: Interested Parties
FROM: John Nienstedt and Jenny Holland, Ph.D.
RE: Results of 2018 Pre-Primary California Gubernatorial Poll
DATE: May 24, 2018

This analysis is based on the results from our poll of 501 randomly-sampled likely California primary voters which we fielded May 20 through 22. 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.

Summary

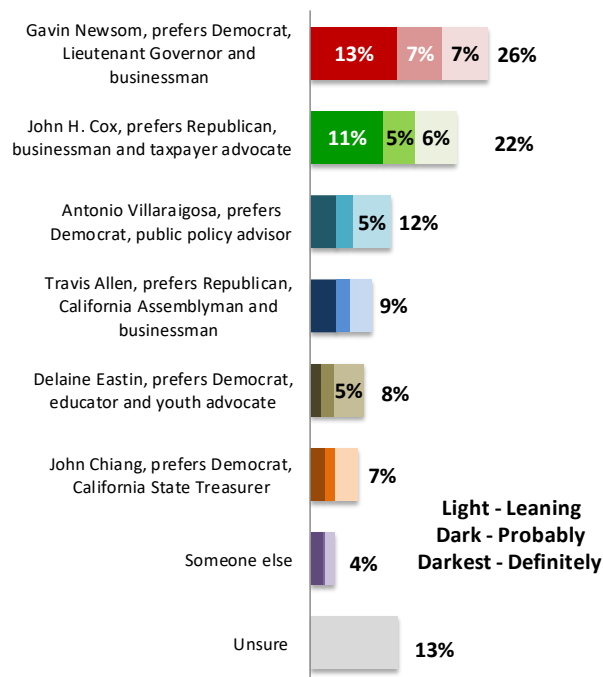
Lieutenant Governor Gavin Newsom will almost certainly move on to November’s general election. Other polls have shown the Democrat and former San Francisco Mayor safely in the top two and this Competitive Edge poll reinforces that. This poll also indicates Newsom will likely face Republican businessman John Cox in the run-off, as both enjoy relatively firm support. Former Los Angeles Mayor Antonio Villaraigosa and Republican Assemblyman Travis Allen are locked in a tight battle for third place. Despite 2018 being heralded by some as a “Year of the Woman,” the race’s only prominent female, Delaine Eastin, trails with weak support along with State Treasurer John Chiang. Thirteen percent of likely voters remain undecided, giving second tier candidates some hope of narrowing the gap in the campaign’s final two weeks. However, the strength of the two leading candidates’ support makes catching them a longshot.

Analysis

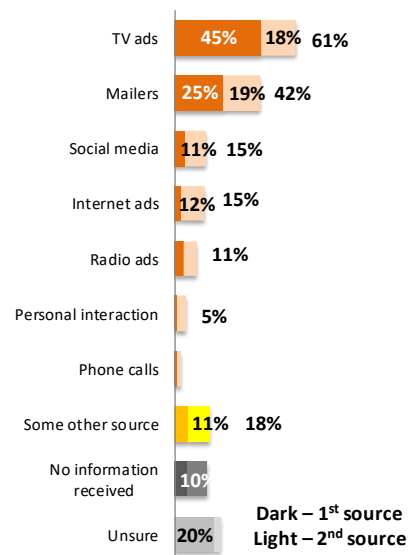
The Democratic candidates have been running copious amounts of TV advertising and that medium is still king of the campaigns. Sixty percent of voters have seen TV ads for the governor’s race, while 42% have received mail pieces.

Newsom has been contrasting himself with Cox over the airwaves, intending to tell Democrats that he’s the real liberal and simultaneously communicate to Republicans that Cox is their choice. President Trump recently abetted Newsom’s strategy by endorsing Cox over Allen, despite the latter being the only major candidate to have voted for Trump in 2016. Most Republicans now have a favorable impression of Cox, but the rest of the electorate generally isn’t paying enough attention to him to have an opinion. Crucially,

CA Governor Vote



Campaign Information Sources

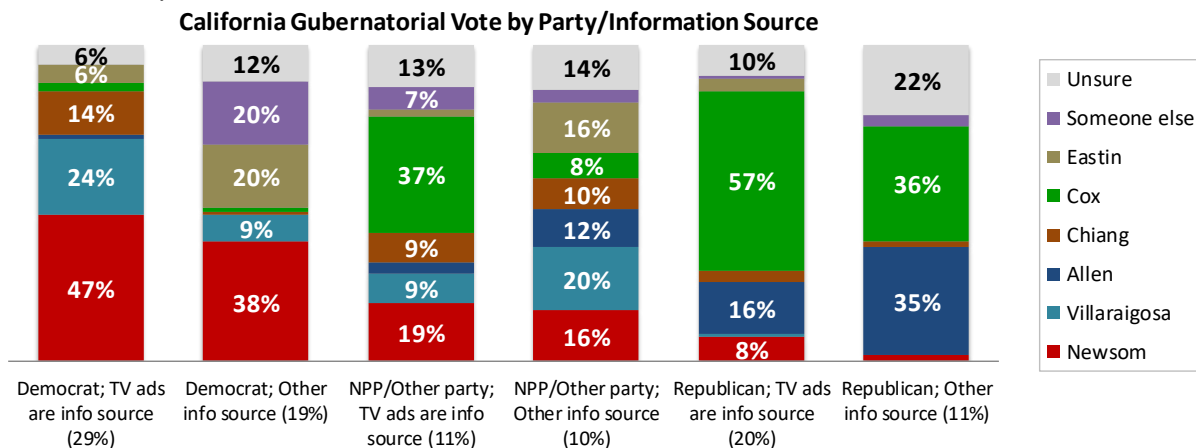


Newsom cannot afford a fragmentation of the Republican vote which would open a path for a Democratic challenger to sneak in to second place.

The Competitive Edge poll shows Newsom’s strategy to bolster Cox is working. Not only has Newsom cultivated a solid lead – 13% of his overall vote is definite and 22% of Democrats are solidly behind him – Republicans have coalesced around the businessman. Newsom does extremely well among Democrats outside the Los Angeles and Inland Empire portions of the state, as well as — and this is where it gets very tough for Villaraigosa — among very reliable Democrats in Los Angeles and the Inland Empire. Newsom has locked down a surprisingly high percentage of Democratic votes on Villaraigosa's home turf.

Villaraigosa has been unable to leverage what should be his geographic base. Instead, he's doing well only where 20% or less of the population is white. What support Villaraigosa gets from Latino voters is astonishingly tepid. While 23% of Latinos say they are voting for him, the lion's share are leaners, indicating Villaraigosa has not closed the deal with them.

Reflecting issues with the Republican brand, Cox does poorly with Latino voters, garnering only 10% of their vote. TV ads are responsible for pushing Cox into contention. Although Democrats rarely vote for Cox, non-partisans sing a different tune *if they have seen TV ads for governor*. Thirty-seven percent of the non-partisans who have seen the ads vote for Cox, while just 8% who don't mention the ads do the same. The effect of the ads is also impressive among Republicans: 57% who have seen them support Cox, while only 36% who don't mention the ads do the same.



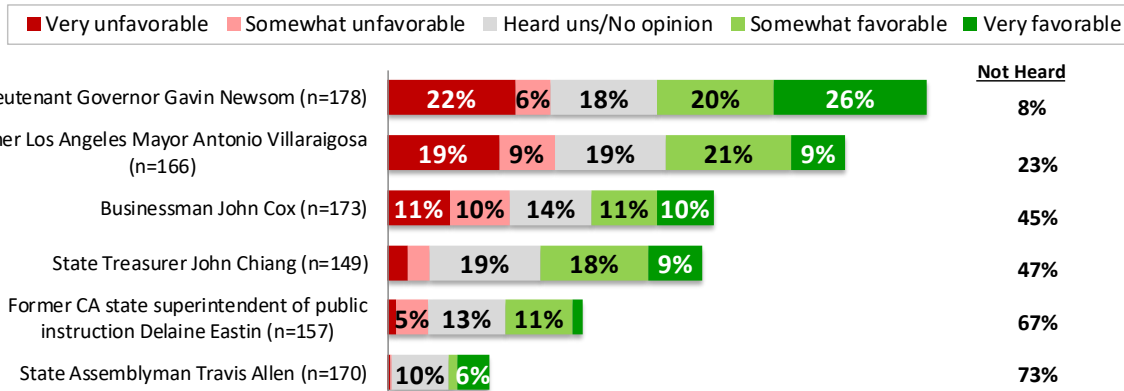
Allen gets only 23% of his party’s vote and much of that is weak, while Cox enjoys support from half of the Republicans and 27% is locked down. Allen, who is not using TV ads, is suffering from his opponents' ads. While Republicans who don't mention seeing campaign ads vote for him 35% of the time, only 16% of Republicans who cite TV commercials are in Allen's camp. Allen has evidently developed a following among social media users. Fifty-eight percent of those who cite social media as a source know Allen, but, unfortunately for him, only 13% rely on those sites for their information.

Newsom’s lead among Democrats is unchallenged because his Democratic opponents split the vote. With the non-Newsom votes fracturing, his competition is not gaining traction among the largest partisan segment. That leaves Villaraigosa, Eastin and Chiang to fight for votes among non-partisans and minor party voters. There are four problems with a strategy that focuses on these voters: non-partisans, by their nature, are difficult to corral, there aren't many of them, Cox, Allen and Newsom himself are picking up substantial numbers of votes among them and they are not habitual ballot casters. Non-

partisans are no more energized for this election than any other group. The survey also indicates Democrats are no more enthused than Republicans.

Republican voters don't like Villaraigosa, but not close to the extent that they loathe Newsom. As for the rest of the electorate, Villaraigosa is unable to parlay his time leading California's largest city into a solid base of support, although non-Republicans in neighboring Riverside County do generally like him.

Impressions of the Candidates



Eastin is showing signs of life among Democrats and non-partisans likely to vote by mail, but even with those voters her support is weak. She is almost entirely unknown to voters younger than 63.

Chiang's TV ads appear to have raised his profile. While only 20% of those who haven't seen many campaign TV commercials have an opinion of Chiang, that increases to 48% among those who have seen the ads. That heightened name recognition, however, has not turned into support.

Newsom has name recognition going for him. While a lot of voters dislike him, those are mostly Republicans who will never vote for him. The rest of the electorate runs from tolerating the Lieutenant Governor – generally younger non-partisans – to genuinely liking him, as longtime Democrats do.

California Governor 2018 Primary

n=501 California Voters

Turnout Model: 30%

Margin of Sampling Error +/- 4.4%

May 20-22, 2018

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

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	15.1
Are you absolutely certain to vote	62.3
Probably going to vote	15.9
May or may not vote depending on what's happening at the time	4.3
Unsure (<i>Not read</i>)	2.4

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 (n=173)	9.6	10.9	10.1	10.6	13.7	44.8	0.3
Q3. State Assemblyman Travis Allen (n=170)	5.5	1.4	0.3	0.5	9.5	72.8	0.0
Q4. Former California state superintendent of public instruction Delaine Eastin (n=157)	1.6	11.3	5.4	1.5	13.0	67.3	0.0
Q5. Lieutenant Governor Gavin Newsom (n=178)	25.9	19.6	6.0	21.7	18.1	8.1	0.6
Q6. Former Los Angeles Mayor Antonio Villaraigosa (n=166)	9.1	21.1	9.4	18.8	18.7	22.6	0.3
Q7. State Treasurer John Chiang (n=149)	9.0	18.3	3.7	3.4	18.6	47.0	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	21.8
John H. Cox, prefers Republican, businessman and taxpayer advocate	19.2
Delaine Eastin, prefers Democrat, educator and youth advocate	7.7
Antonio Villaraigosa, prefers Democrat, public policy advisor	7.6
Travis Allen, prefers Republican, California Assemblyman and businessman	7.4
John Chiang, prefers Democrat, California State Treasurer	4.7
Or are you voting for someone else	3.4
Unsure (Not read)	28.3

Q9a. And are you... (of those who selected a candidate in Q8a, n=303)

	%
Definitely voting for that candidate	36.4
Probably voting for that candidate	31.7
Or only leaning towards that candidate	29.5
Unsure (Not read)	2.4

Q10a. And which candidate are you leaning towards? (Asked of those "Unsure" on Q8A, n=110)

	%
Antonio Villaraigosa, prefers Democrat, public policy advisor	11.5
Gavin Newsom, prefers Democrat, Lieutenant Governor and businessman	9.5
John Chiang, prefers Democrat, California State Treasurer	9.2
John H. Cox, prefers Republican, businessman and taxpayer advocate	8.0
Travis Allen, prefers Republican, California Assemblyman and businessman	5.5
Delaine Eastin, prefers Democrat, educator and youth advocate	4.1
Unsure/Did not vote on this measure (Not read)	52.2

Q8b. And in the Governor's race, which of the following candidates did you vote for? (Asked of those "Already voted" on Q1, n=88)

	%
Gavin Newsom, prefers Democrat, Lieutenant Governor and businessman	35.4
John H. Cox, prefers Republican, businessman and taxpayer advocate	21.8
Antonio Villaraigosa, prefers Democrat, public policy advisor	17.4
Travis Allen, prefers Republican, California Assemblyman and businessman	10.9
John Chiang, prefers Democrat, California State Treasurer	5.5
Delaine Eastin, prefers Democrat, educator and youth advocate	3.1
Or are you voting for someone else	5.9

Primary Vote

	%
Gavin Newsom, prefers Democrat, Lieutenant Governor and businessman	26.1
John H. Cox, prefers Republican, businessman and taxpayer advocate	21.5
Antonio Villaraigosa, prefers Democrat, public policy advisor	11.9
Travis Allen, prefers Republican, California Assemblyman and businessman	9.3
Delaine Eastin, prefers Democrat, educator and youth advocate	8.0
John Chiang, prefers Democrat, California State Treasurer	7.0
Someone else	3.8
Unsure	12.6

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	44.5
Mailers	24.6
Social media	5.1
Radio ads	4.4
Internet ads	3.2
Phone calls	1.1
Personal interaction	0.9
Or some other source	7.1
No information received (<i>Not read</i>)	6.7
Unsure (<i>Not read</i>)	2.1
Refused (<i>Not read</i>)	0.3

Q12. Which of the remaining has been your secondary source of information? (*n=452*)

	%
Mailers	19.3
TV ads	17.7
Internet ads	12.4
Social media	11.2
Radio ads	6.7
Personal interaction	4.7
Phone calls	1.9
Or some other source	12.2
No other information received (<i>Not read</i>)	9.9
Unsure (<i>Not read</i>)	3.8
Refused (<i>Not read</i>)	0.1

Total Source of Information

	%
TV ads	60.6
Mailers	42.2
Social media	15.3
Internet ads	14.6
Radio ads	10.5
Personal interaction	5.2
Phone calls	2.9
Or some other source	18.2

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	27.4
Somewhat more important	6.9
Less important	2.1
About the same	61.1
Unsure (<i>Not read</i>)	2.6

Q15. In what year were you born?

	%
18-24	4.3
25-34	10.8
35-44	9.8
45-54	13.7
55-64	20.3
65-74	21.8
75+	19.2
Average	59.2

Q16. And were you born in . . .

	%
California	50.1
Somewhere else in the U.S.	37.3
In a foreign country	12.7

17. GENDER

	%
Male	46.2
Female	53.8

18. PARTY

	%
Democrat	47.9
Republican	31.6
NPP	18.0
Other Party	2.6

19. TURNOUT HISTORY

	%
New/Unreliable	4.4
Reliable	44.3
Very reliable	51.2

20.	PERMANENT ABSENTEE VOTER	
		%
	Yes	65.4
	No	34.6
21.	RESIDENCE TYPE	
		%
	Home	82.3
	Apartment	17.7
22.	LENGTH OF REGISTRATION	
		%
	2015 to Present	30.8
	2008 to 2014	23.4
	2000 to 2007	21.0
	Before 2000	24.8
	Average	2010
23.	# OF VOTERS IN HOUSEHOLD	
		%
	1	24.9
	2	48.9
	3	15.9
	4	10.3
24.	LATINO SURNAME	
		%
	Yes	14.2
	No	85.8
25.	% OF ASIANS IN PRECINCT	
		%
	0	20.3
	1-3	19.5
	4-10	23.9
	11-20	20.4
	>20	16.0
	Average	6.0
26.	% OF AFRICAN AMERICANS IN PRECINCT	
		%
	0	39.0
	1	10.2
	2	12.1
	3-10	23.7
	>10	15.0
	Average	2.0

27. % OF WHITES IN PRECINCT

	%
0-30	13.6
31-60	28.8
61-70	18.1
71-80	12.9
>80	26.5
Average	65.0

28. % WHITE-COLLAR PROFESSIONALS IN PRECINCT

	%
0-50	26.4
51-60	15.3
61-70	16.2
71-80	20.1
>80	22.0
Average	65.0

29. % COLLEGE GRADUATES IN PRECINCT

	%
0-10	22.6
11-20	22.5
21-30	31.8
31-40	17.8
>40	5.3
Average	23.0

30. MEDIAN INCOME IN PRECINCT

	%
<\$40K	17.4
\$40-\$60K	26.6
\$61-\$80K	20.8
\$81-\$100K	10.5
>\$100K	24.7
Average	\$66,200