

MEMORANDUM

TO: Interested Parties
FROM: John Nienstedt and Jenny Holland, Ph.D.
RE: California Flight
DATE: January 8, 2019

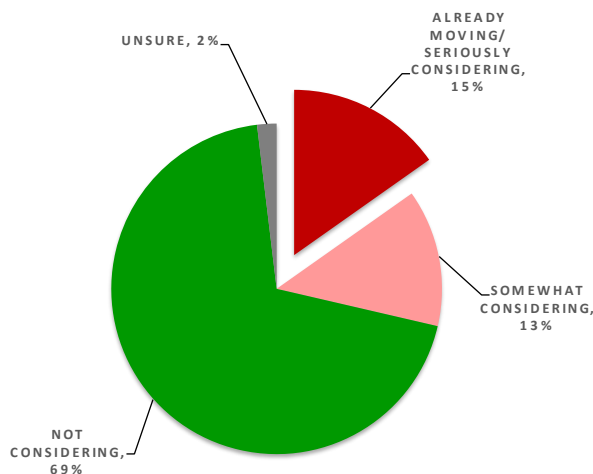
This analysis is based on the results from our poll of 806 randomly-sampled likely November general election voters in California which we fielded October 29 through November 2. The turnout model reflects 53% participation. The margin of sampling error is +/-3.5% at the 95% confidence level. Interviews were conducted by trained professionals from our offices in El Paso, TX, and via e-mail.

Moving Outside of California

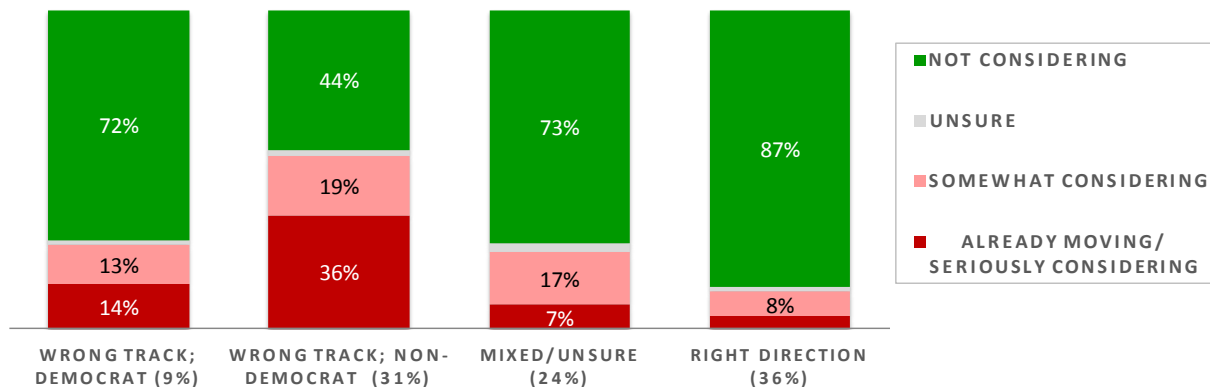
Fifteen percent of voters are seriously considering leaving California or are already doing so, and another 13% have given some thought to such a move. In raw numbers, that means as many as 10 million people are contemplating what would amount to a mass exodus. When every fourth voting household is thinking about exiting the Golden State, it's clear the luster has worn off for many.

Analysis suggests general dissatisfaction with the way things in California are going has mixed with politics to create a highly toxic brew: a sense that it's time to get out of the state. A whopping 55% of Republicans and non-partisans who believe California is headed in the wrong direction are considering leaving. Thirty-six percent say they are serious about that or they are already leaving the state. This group comprises a sizable 31% of the electorate. If they left, that would open an even larger statewide Democratic registration advantage. Governor Newsom may cheer that result, as California would tilt even further to the left side of the ideological spectrum. In contrast,

MOVING OUTSIDE OF CALIFORNIA



MOVING OUTSIDE OF CALIFORNIA BY CIVIC MOOD/PARTY



only 27% of Democrats who believe things are on the wrong track are considering leaving. Their desire to relocate – though sizeable -- is somewhat mitigated by the fact their party controls the state.

Voters who regard the state's direction as "mixed" or who are unsure where things are headed are less serious about vacating California. Still, 24% are thinking about a move, and that's regardless of their political affiliation. It's only voters who believe the state is on the right track that the Governor can truly count on to remain in the California. Eighty-seven percent of them have no intention of leaving, but they comprise a 36% minority of the electorate.

Demographics

- Gender: Female 47.2%
- Age: 18-24 7.4%, 25-34 12.5%, 35-44 13.0%, 45-54 15.7, 55-64 20.0%, 65-74 17.8%, 75+ 13.6%
- Ethnicity: Latino 18.2%
- Area: North 7.2%, Bay Area 21.4%, Central Valley 15.8%, Central Coast 4.5%, LA & Inland Empire 33.9%, South 17.1%
- Party: Democrat 45.5%, Republican 27.8%, No Party Preference/Other party 26.7%
- Ideology: Liberal 50.4%, Unsure 14.8%, Conservative 33.8%