

Survey of California's New Voters

April 2017



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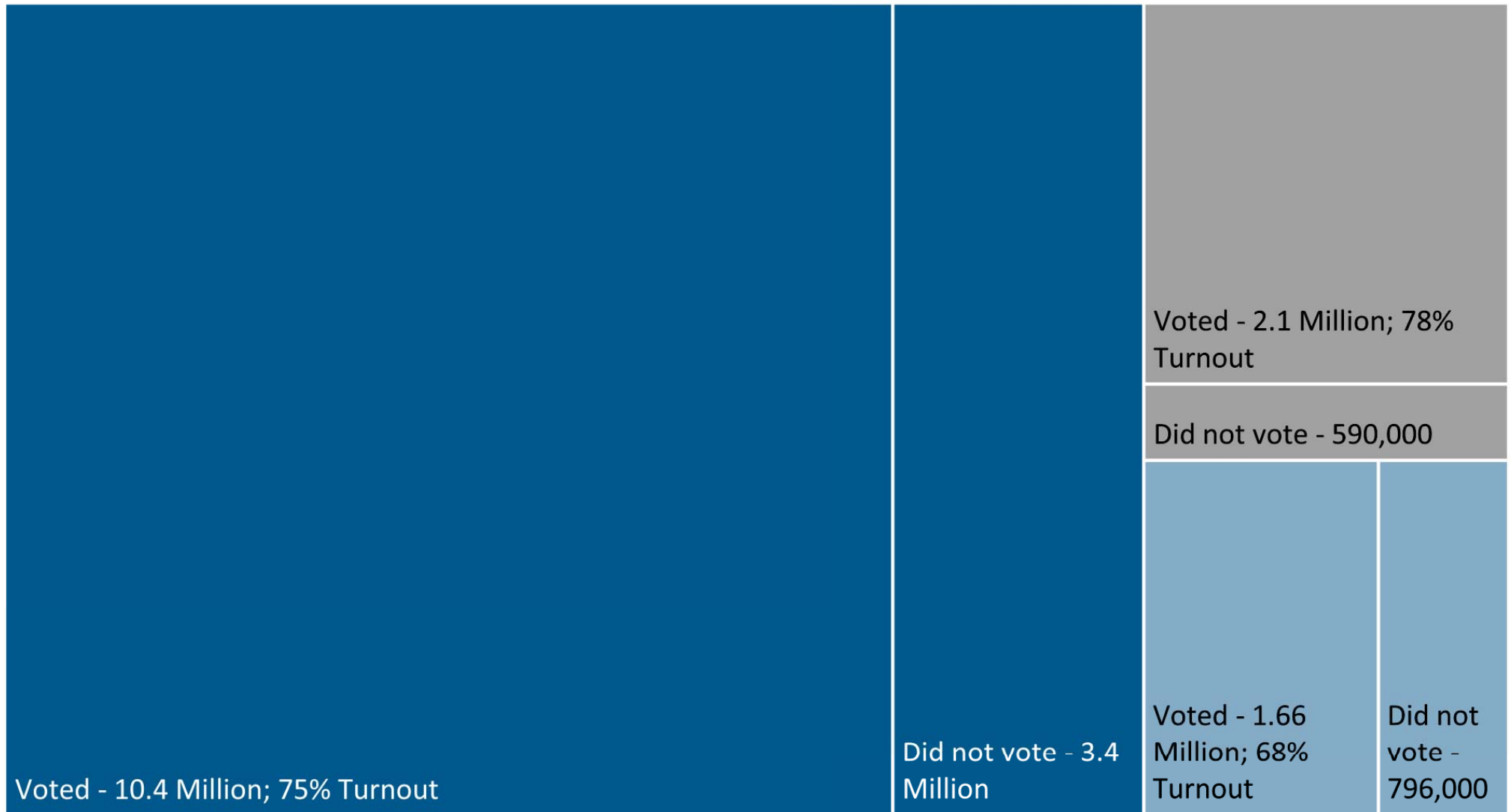
Survey Universe and Methodology

- ▶ 5.1 million people registered to vote in California in 2016 prior to October 24th. That is 27% of all registered voters in the state.
- ▶ 2.69 million are voters with previous listed history of voting, who re-registered to vote (for example, if they moved to a new home.)
- ▶ 2.45 million are truly “new” on the voter file, with no previous vote history.
 - The survey was conducted among this group.
 - 1.66 million or 68% registered in time for the June Primary and 26% voted.
 - 68% voted in the November general election, making up 11.8% of November voters.
 - The survey also included a statewide sample of all November 2016 voters for comparison.
- ▶ Survey was conducted April 4th-18th, 2017.
 - Overall Sample n=2,288 voters
 - November 2016 Voters Overall; n=888 (effective n weighted to correct for oversample), Margin of Error ± 3.3 percentage points
 - Oversample of November 2016 New Voters: n=1,504, Margin of Error ± 2.53 percentage points

Please note that due to rounding, some percentages may not add up to exactly 100%.

Registration Date and 2016 Turnout

- Registered Prior to 2016
- Registered 2016 with No Prior Vote History
- Registered 2016 with Previous Vote History on File



Key Findings

- ▶ California's millions of new voters are highly engaged, and many primed to return to the polls in 2018.
- ▶ New registrants who voted in November report high interest and engagement:
 - 75% say they are following politics more closely since the November election.
 - 28% say they have marched or protested since the election.
 - 45% are highly interested in the 2018 elections, and 31% are at least somewhat interested.
- ▶ TV and digital media dominate new voters' recall of 2016 campaign contact.
- ▶ Not all new voters were Democrats voting for Clinton:
 - 58% report that they voted for Hillary Clinton, 25% voted for Trump.
 - 30% of new voters say they cast their voter primarily against Trump, as opposed to 28% that voted primarily for Clinton.

Key Findings - Continued

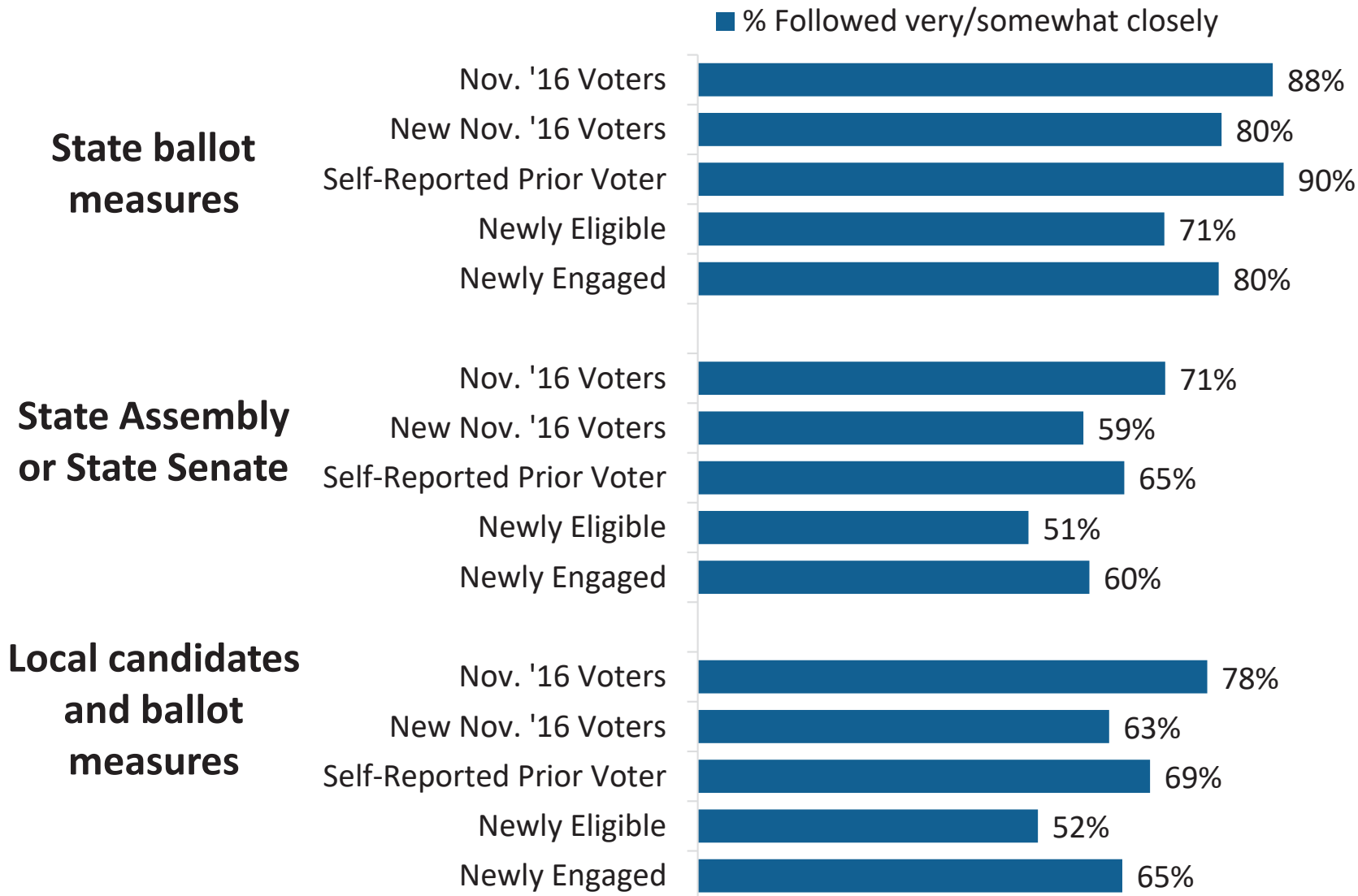
- ▶ New voters are more progressive and more opposed to the Trump administration than overall November voters.
- ▶ Importantly for California campaigns, not all new registrants are the same. The survey identified three distinct categories of new registrants, each with a different likelihood of voting in midterm elections.
 - Newly eligible voters: 24% of November's new voters are under age 23 or new citizens and are voting in their first presidential election
 - Newly engaged voters: Just over half of November's new voters (52%) were eligible in past presidential elections, but registered for the first time to participate in the 2016 election.
 - Self-reported prior voters: 24% of new voters have no vote history on file but report they are regular voters and re-registered because of a move. These voters have an attitudinal and demographic profile similar to regular voters and may be a key turnout target for midterm campaigns.

Getting New Voters' Attention



Attention to Down-Ballot Races Among New Voters

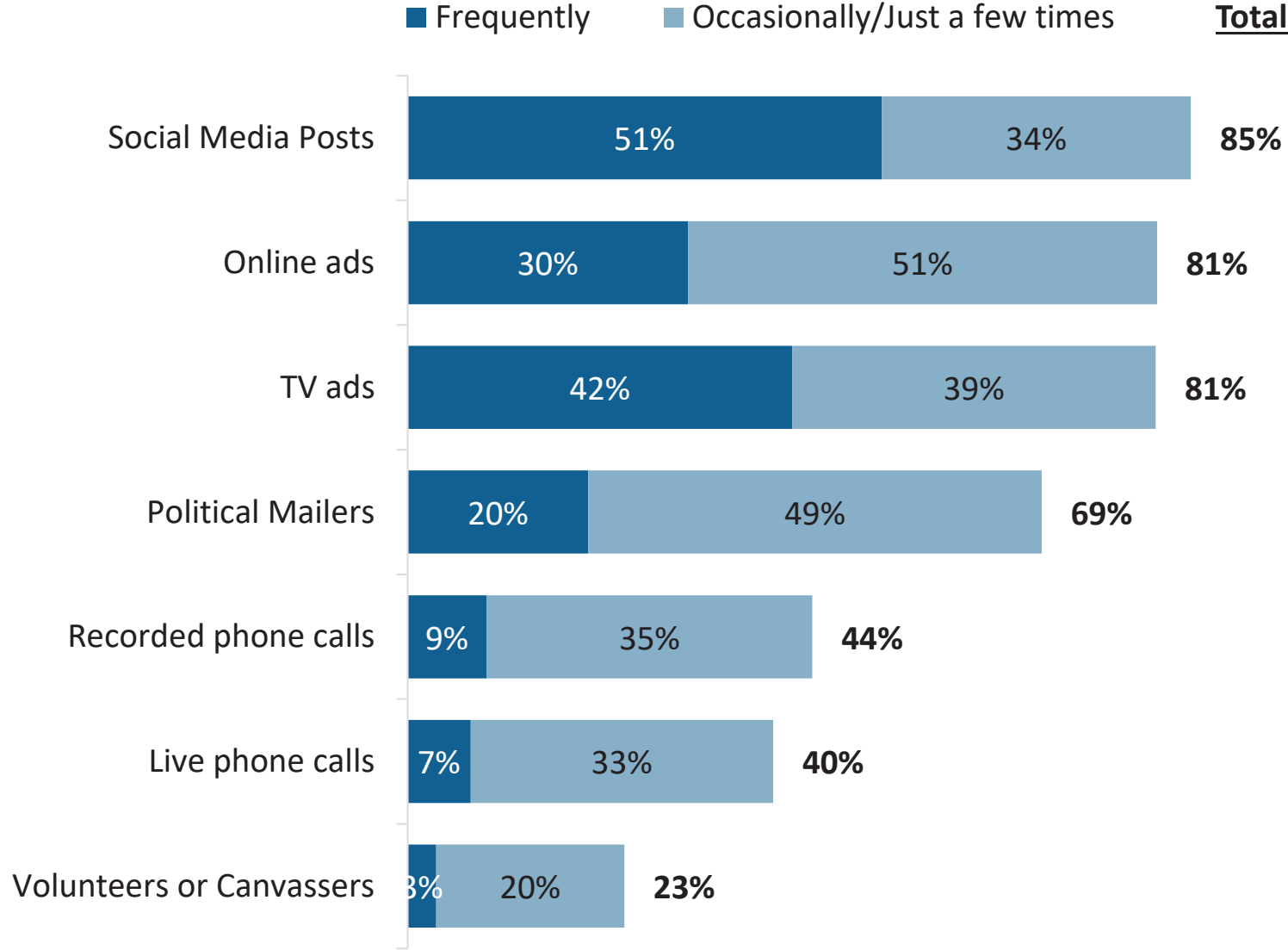
Interest for down ballot items is lower among New Nov. '16 voters.



Q23-25. Using the scale below, when thinking about the November 2016 election please indicate how closely you followed **"The elections for..."**

Campaign Contact Recall

New voters have the greatest recall of social media posts, television ads and digital ads.

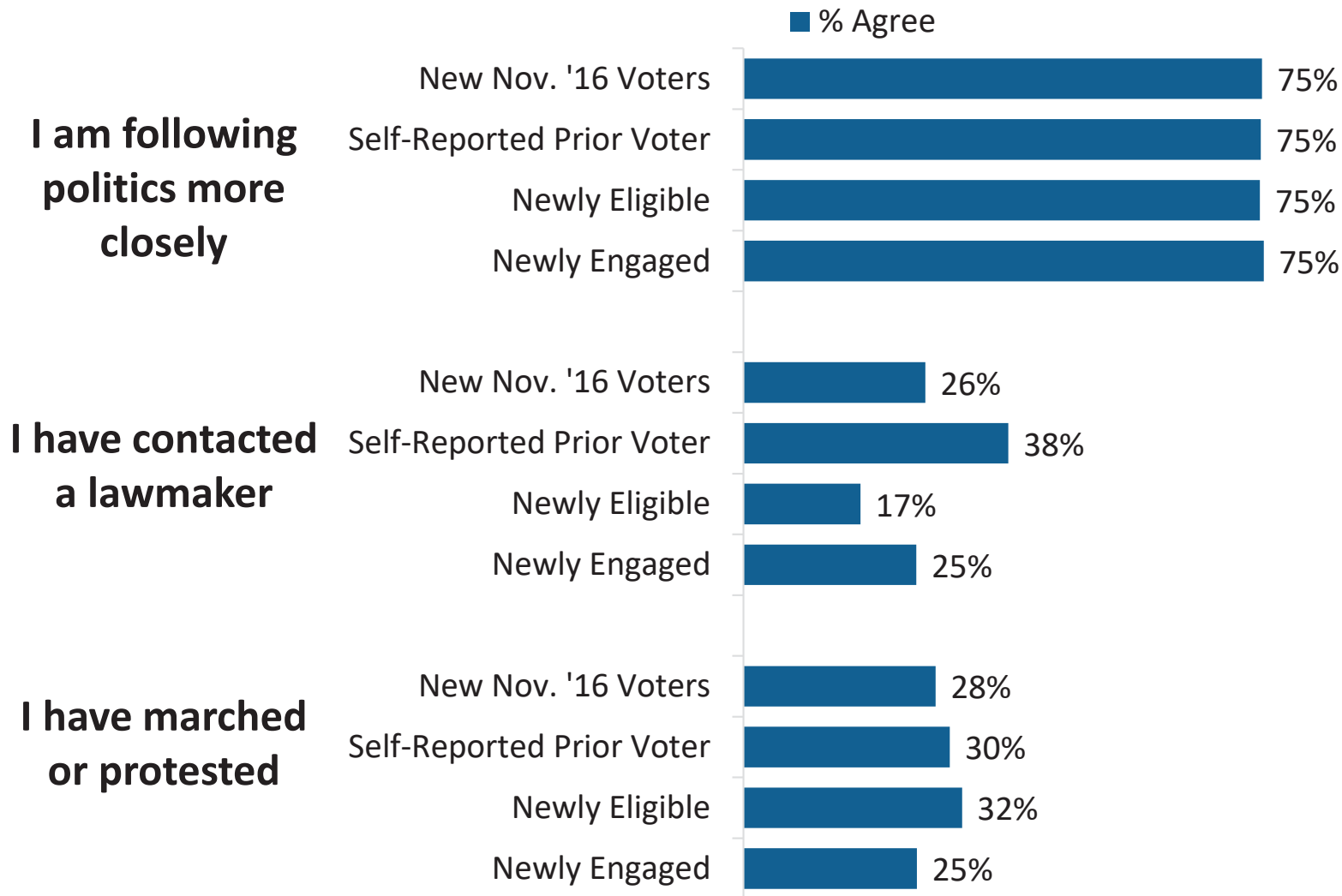


Q26-32. In 2016, how often did you hear anything about candidates, ballot measures, or the election generally from...



Post Election Attitudes

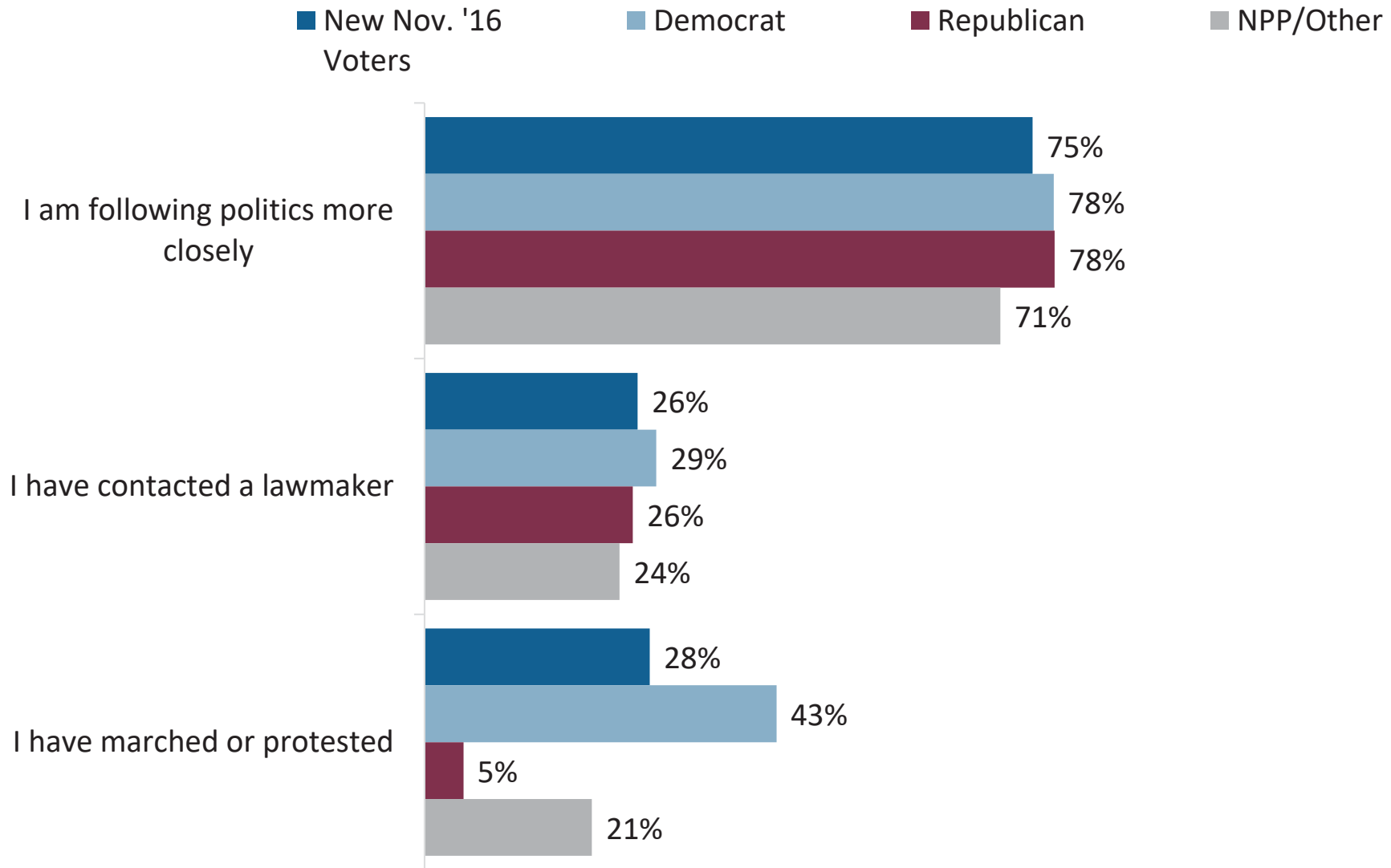
Over a third of Self-Reported Prior voters say they contacted a lawmaker since the November election and about a third of Newly Eligible voters say they have marched or protested.



Q36-38. Please indicate whether you agree or disagree with each of the following statements.
 “Since the November election....”

Post Election Attitudes by Party

Over four-in-ten New Nov. '16 Democrats say they have marched or protested since the election, compared to 5% of Republicans and 21% of Non-Partisan Voters.



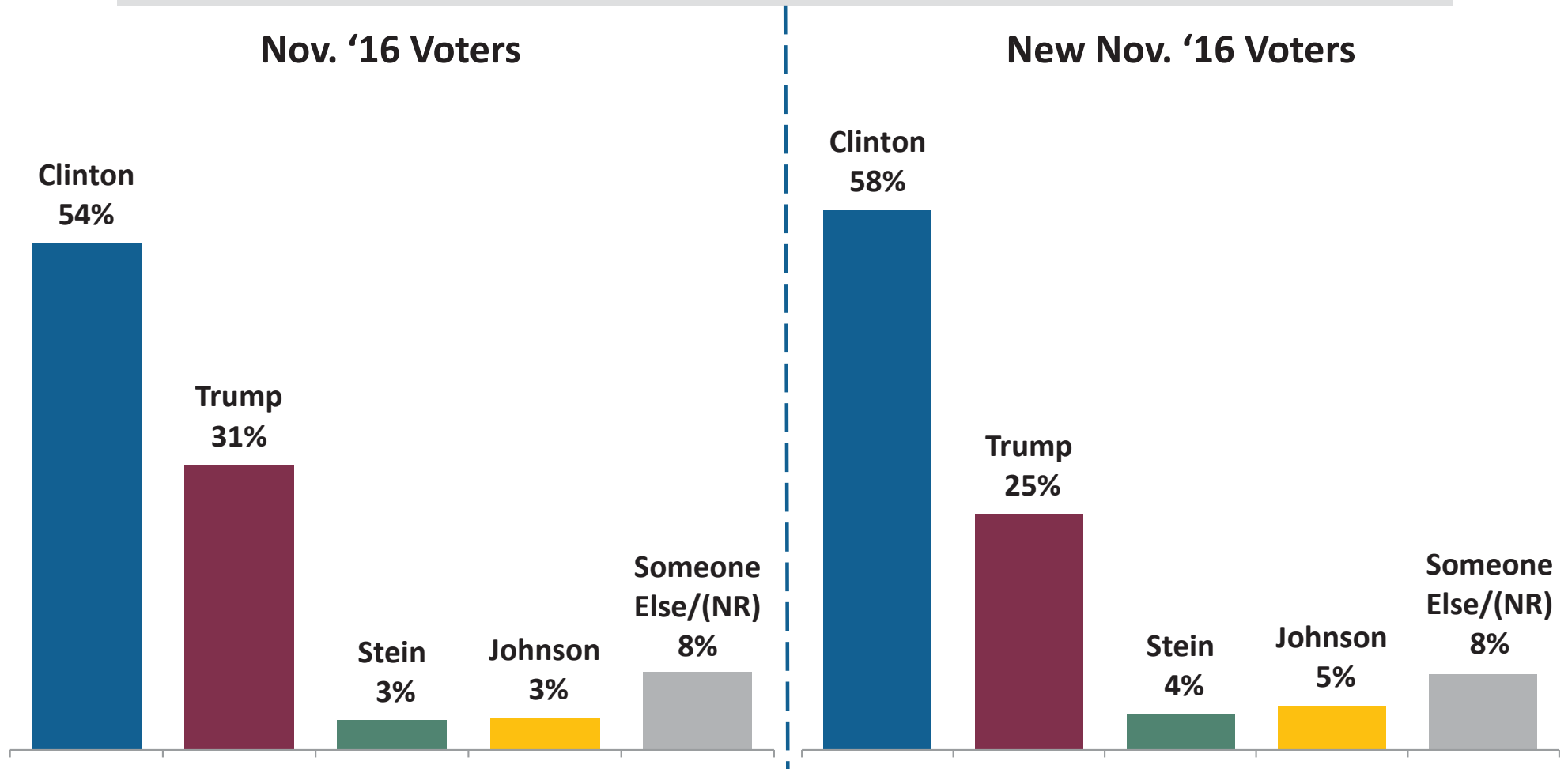
Q36-38. Please indicate whether you agree or disagree with each of the following statements.
"Since the November election..."

New Voters: Who did they vote for and why?

Presidential Vote

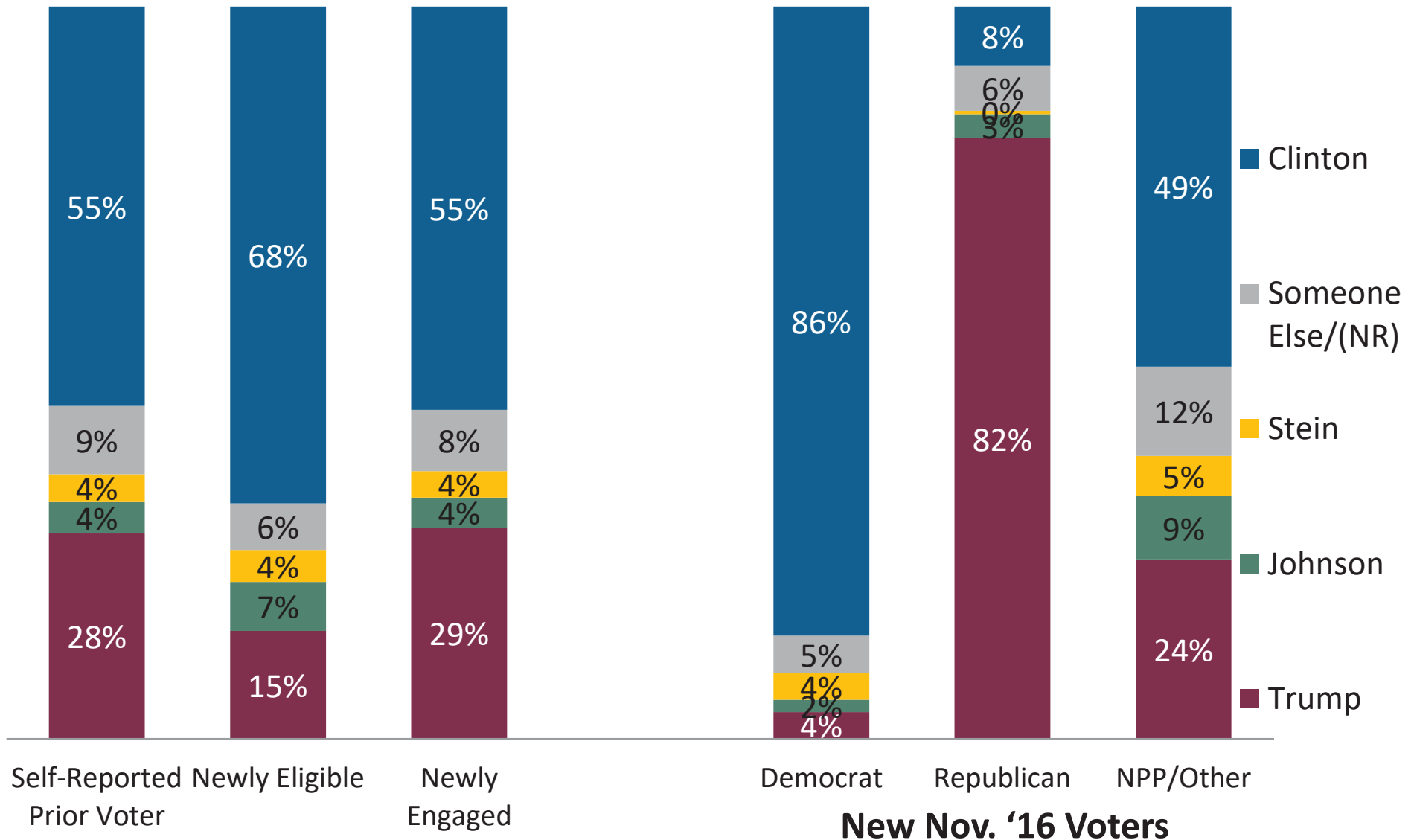
A majority of New November 2016 voters voted for Clinton, with a quarter of them casting a vote for Trump.

“In the November 2016 presidential election, did you vote for...”



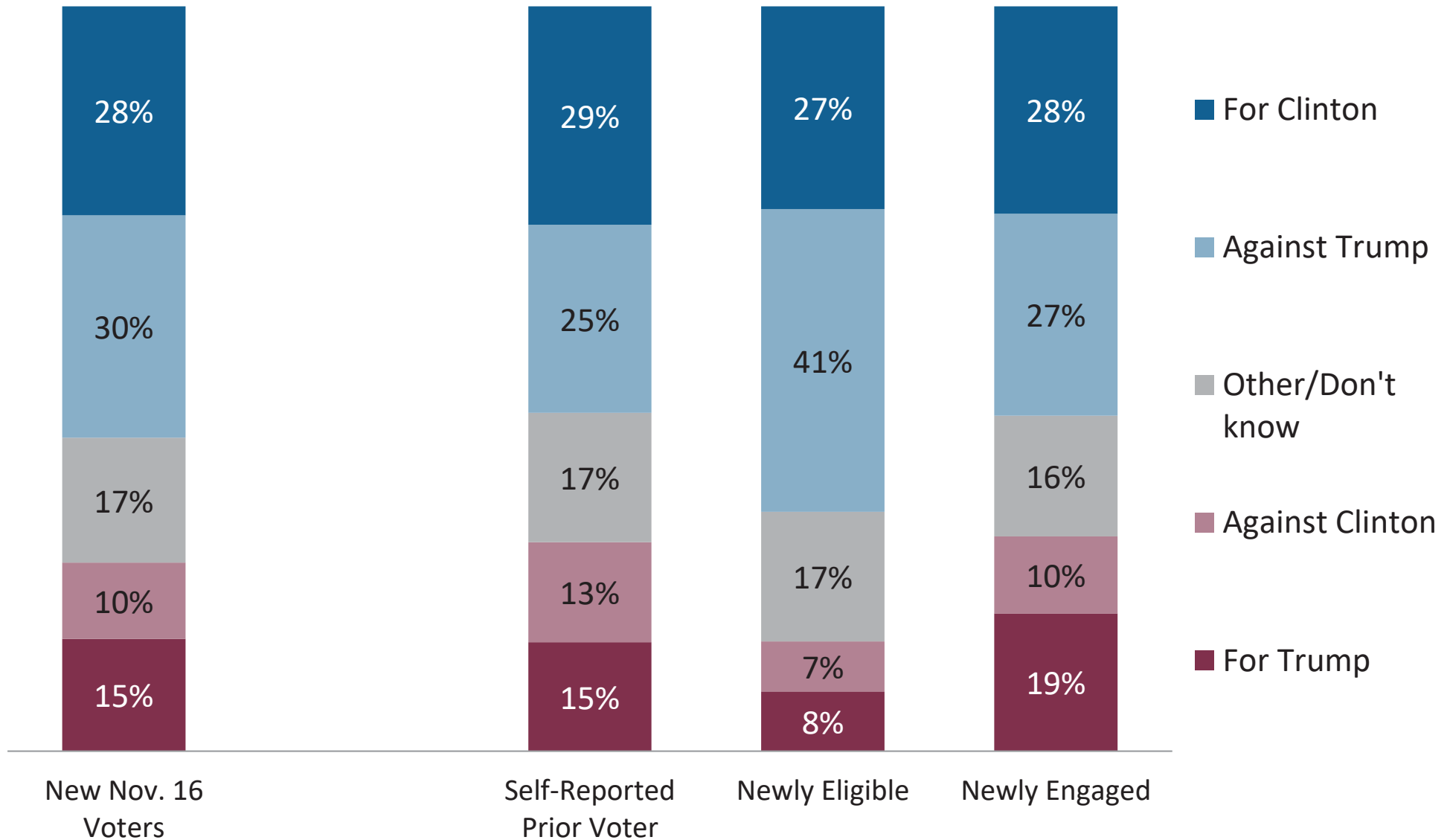
Presidential Vote Among New Voter Subgroups

More than two-thirds of Newly Eligible voters chose Clinton, but Clinton won less than 50% of new non-partisan voters.



Presidential Vote Motivation

Among New November 2016 voters, a majority of those who voted for Hillary Clinton, did so in order to cast a vote against Trump.



Q19. In the Presidential election, would you say your vote was more for [CLINTON/TRUMP] or against (INSERT OTHER CANDIDATE)?..."

Reasons for Voting Among New Voters

The top reason for voting among New Nov. '16 Clinton voters was to oppose Trump. Among New Nov. '16 Trump voters, the top reason was that change was needed.

	Overall	Clinton Voters	Trump Voters	Other
Oppose Donald Trump/Republicans	24	34	8	15
Civic duty/Responsibility	17	19	13	21
Wanted to vote for president/Have a voice/Participate	11	11	5	25
Change was needed	11	5	27	6
America first	4	2	8	3
Oppose Hillary Clinton/Democrats	4	0	14	0
Support Hillary Clinton	3	4	1	-
Support Trump/Republicans	2	2	3	3
Presidential election	2	2	1	4
Concern about country's future	2	2	2	4
Continue progress that Obama made	2	3	1	-
First time I could vote	2	2	2	1
I always vote	2	1	1	4
Fight racism	2	2	-	2
Immigration	1	1	3	-
Equality	1	2	0	1
Drain the Swamp/Corruption	1	0	5	0
Didn't like either candidate	1	1	1	5
Candidate Qualifications	1	1	2	1
Local/State Measure/Propositions	1	0	1	5
Other	13	13	14	10
No Response	6	5	4	5

Profiling New November 2016 Voters



New November 2016 Voter Segmentation

The survey identified 3 distinct groups of new 2016 voters: Self-Reported Prior voters, Newly Eligible voters and Newly Engaged voters.

■ Self-Reported Prior Voter

■ Newly Eligible

■ Newly Engaged



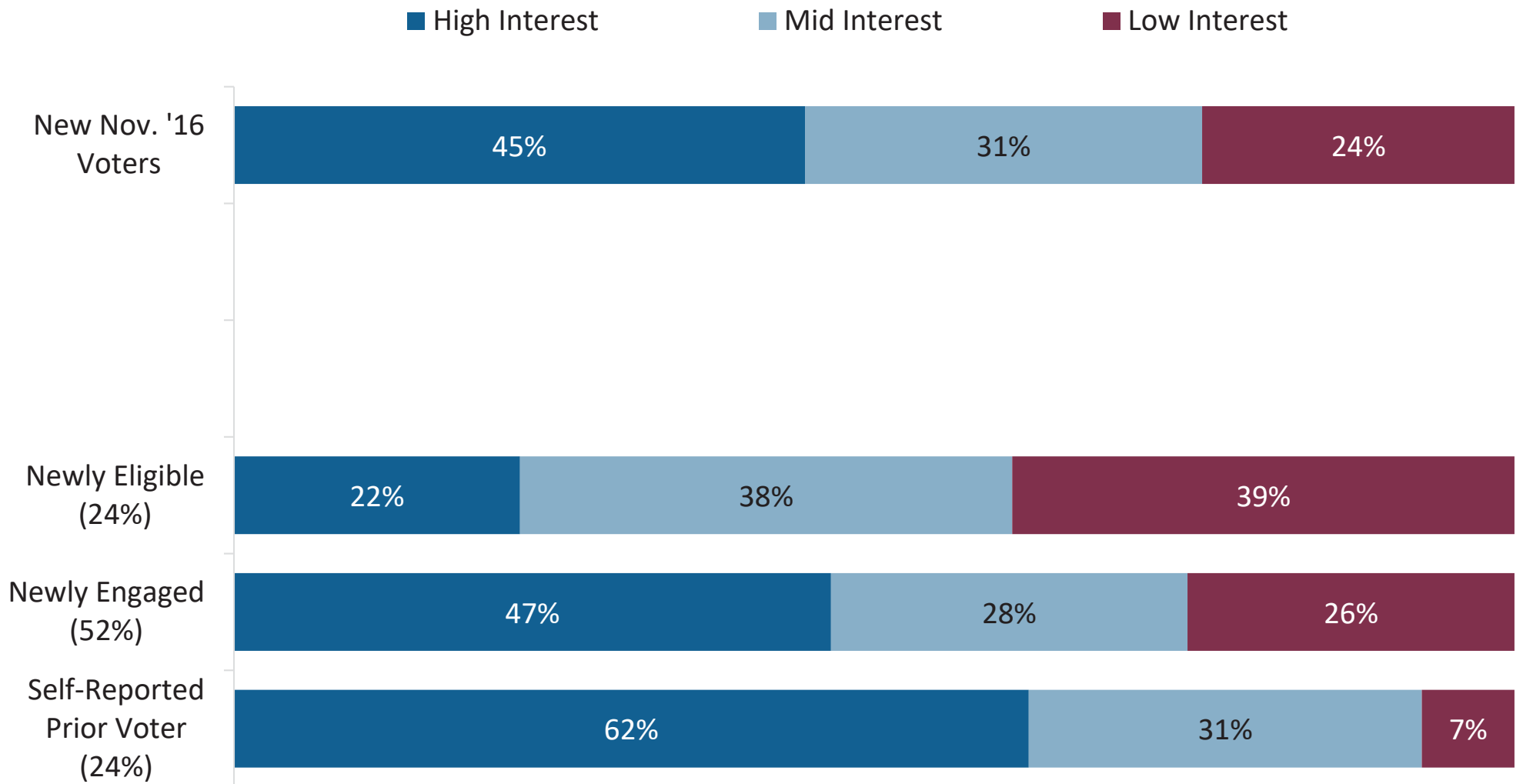
Self-Reported Prior Voter: Voters who say they vote in most elections but re-registered because they moved (moved from out of state, or were not matched to previous voter history in CA).

Newly Eligible: New Voters who are under 23 or new citizens and voting in their first presidential election

Newly Engaged: New Voters who were eligible in past presidential elections, but registered for the first time to participate in 2016.

2018 Voter Interest Segmentation

The Newly Eligible voters, almost all of whom are 18-22 years old, are least likely to vote in 2018. Self-Reported Prior voters express levels of interest similar to the overall electorate. Newly Engaged voters have mixed levels of interest and potential turnout.



Demographic Profile November 2016 New Voters

Newly Engaged voters are more likely to be Latino and younger than Self-Reported Prior voters.

	Overall Nov. '16 Voters	Self- Reported Prior Voter	Newly Eligible	Newly Engaged
Age 18-24	8%	3%	96%	7%
Age 25-34	15%	31%	-	39%
Age 35-44	15%	19%	2%	23%
Age 45-54	17%	15%	2%	15%
Age 55-64	20%	15%	-	10%
Age 65+	26%	16%	-	6%
Democrat	47%	41%	55%	39%
Republican	28%	20%	12%	18%
NPP/Other	26%	40%	33%	43%
African-American	4%	2%	1%	1%
Latino	23%	12%	42%	33%
Asian	8%	6%	13%	10%
White/Other	65%	80%	44%	56%
Liberal	47%	51%	55%	40%
Moderate	24%	23%	27%	33%
Conservative	30%	26%	17%	27%

Demographic Profile November 2016 New Voters

Four-in-ten Newly Engaged voters are college graduates. Newly Engaged Voters are less liberal than Self-Reported Prior voters or Newly Eligible voters.

	Overall Nov. '16 Voters	Self-Reported Prior Voter	Newly Eligible	Newly Engaged
Employed	57%	65%	29%	67%
Retired	24%	16%	0%	7%
Other	19%	19%	71%	26%
<\$30,000	12%	10%	25%	18%
\$30,000 - \$49,000	10%	14%	11%	15%
\$50,000 - \$100,000	28%	25%	16%	29%
\$100,000+	32%	36%	22%	24%
Prefer not to respond	18%	14%	28%	15%
Own/Buying Home	56%	40%	12%	33%
Renting Home	44%	60%	88%	67%
Union Household	32%	28%	29%	26%
Not Union Household	68%	72%	71%	74%
Use Facebook at least once a day	48%	47%	50%	50%
Use other social media at least once a day	25%	28%	60%	33%
Non College Grad.	50%	43%	92%	59%
College Grad	50%	57%	8%	41%
Married	55%	49%	6%	42%
Not Married	45%	51%	94%	58%

Newly Eligible (24%)

- ▶ Newly Eligible Voters are defined as New Voters who are under 23 or new citizens and voting in their first presidential election
 - Nearly all of these new voters are between 18-22, making this the first presidential election they are able to vote in.
 - A majority (55%) are registered Democrats and only 12% are registered Republican compared to 47% of Overall Nov.'16 voters who are registered Democrat and 28% who are registered Republican.
 - 55% are self-identified liberals and 17% consider themselves conservative compared to 47% of Overall Nov. '16 Voters who consider themselves liberals and the 30% who consider themselves conservatives
 - Over half (62%) are students
 - About a quarter (29%) are in a union household
 - Only 12% are homeowners
 - Half (50%) use Facebook at least once per day.
 - 60% of these Newly Eligible voters use Twitter, Snapchat or Instagram at least once per day.

Newly Engaged (52%)

- ▶ Newly Engaged voters are defined as voters who were eligible in past presidential elections, but registered for the first time to participate in 2016.
 - Nearly half (46%) are between 23-34 years old compared to 18% of Overall Nov. '16 voters.
 - A plurality (43%) are registered NPP or with a third party compared to 26% of Overall Nov. '16 voters.
 - 40% of Newly Engaged voters self identify themselves as liberals and 33% as moderates, compared to 47% of Overall Nov. '16 Voters who consider themselves liberals and the 24% who consider themselves moderates.
 - A majority (59%) do not have college degrees
 - About two-thirds (67%) are employed full-time or part-time
 - 42% are married
 - Two-thirds (67%) are renters
 - Nearly two-thirds (62%) make under \$100,000 a year
 - Half (50%) use Facebook at least once per day.
 - A third (33%) use either Twitter, Snapchat or Instagram at least once per day.

Self-Reported Prior Voters (24%)

- ▶ Self-Reported Prior Voters are defined as new voters who say they vote in most elections but re-registered because they moved (moved from out of state, or were not matched to previous voter history in CA)
 - Over a third (34%) are between the ages 23-34 years old compared to 18% of Overall Nov. '16 Voters.
 - A plurality (41%) are registered Democrats and 40% are registered NPP or with a third party, compared to 47% of the Overall Nov. '16 voters who are registered Democrat and 26% who are registered NPP or with a third party.
 - 51% are self-identified liberals and 26% consider themselves conservative compared to 47% of Overall Nov. '16 Voters who consider themselves liberals and the 30% who consider themselves conservatives
 - Over half (57%) have college degrees
 - Nearly half (49%) are married
 - About a quarter (28%) are in a union household
 - 40% are homeowners
 - Over a third (36%) make over \$100,000 a year
 - About half (47%) use Facebook at least once per day.

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