

Putting the 2016 Election into context

Nativism and Paradigm Shift

Cliff Young
President, USPA

May 3, 2016

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Content

3

The Big Picture

10

Shifting Paradigms

16

Election Update

The background of the slide is a composite image. On the left, there is a vertical strip showing a cosmic scene with a galaxy, nebulae, and stars. The rest of the slide has a teal background. A white triangle is positioned at the top center, overlapping the cosmic image and the teal background. Inside this triangle are three circles: a teal one at the top, a yellow one in the middle, and an orange one at the bottom. The orange and yellow circles overlap each other.

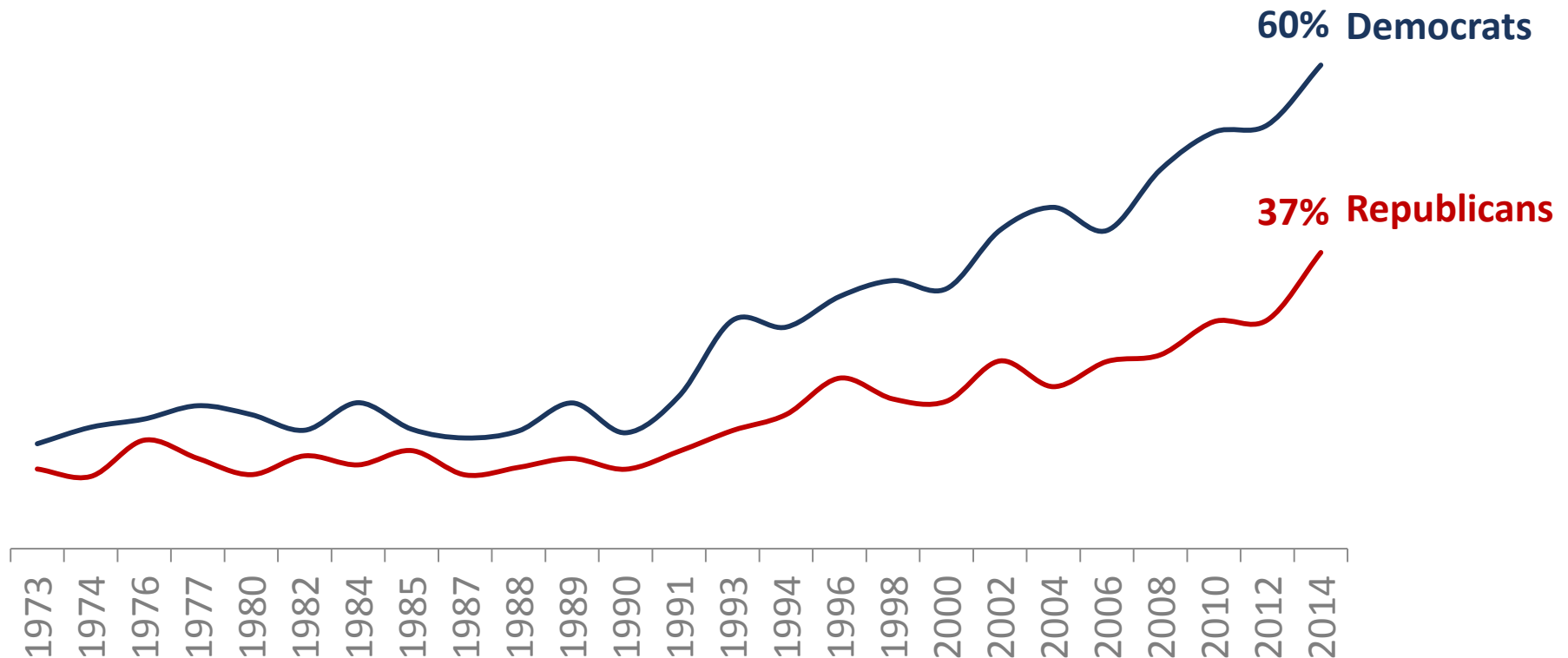
THE BIG PICTURE

Understanding the lay of the land

Two historical drivers of party support in America

Party Divide on the Social Issues

Believe Homosexual Relations are Not Wrong at All

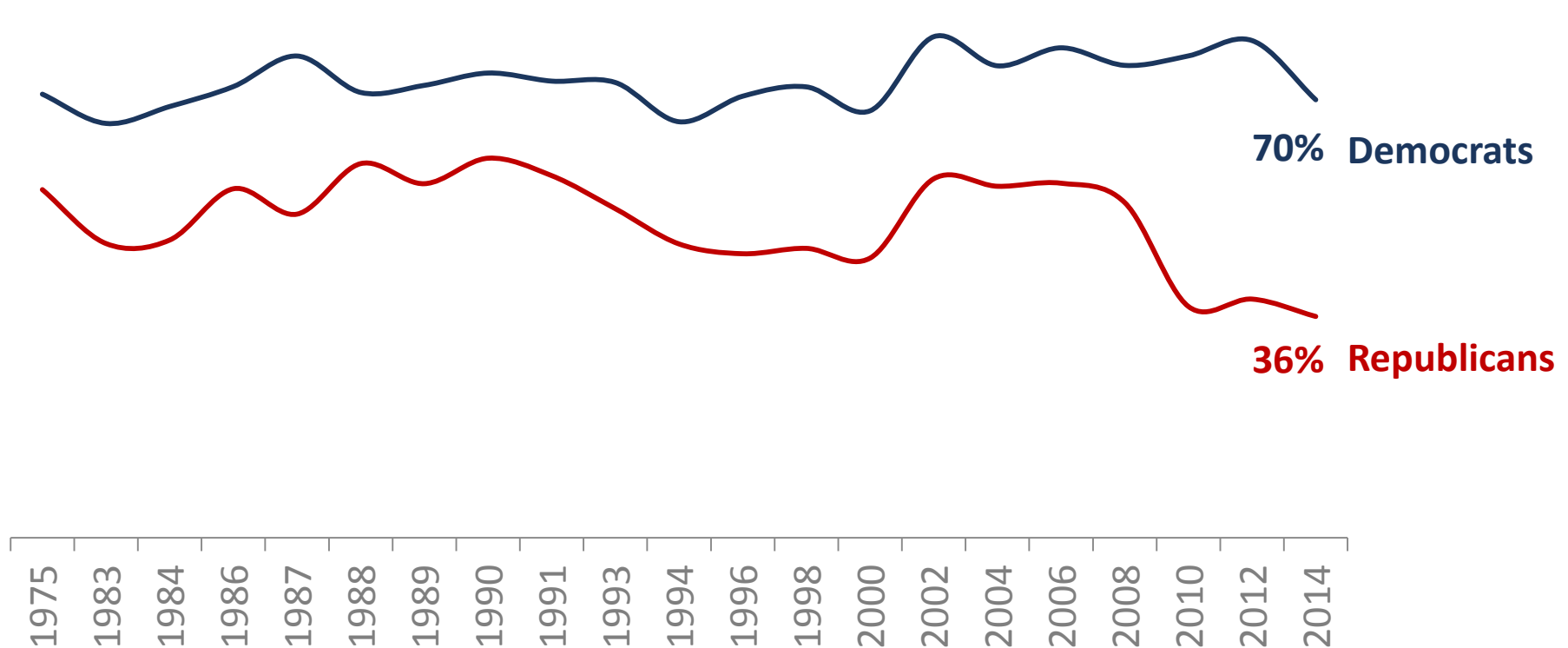


Source: General Social Survey 1975-2014

THE BIG PICTURE

Continued Cleavage: Big versus Small Governments

Believe that the Government Should do More

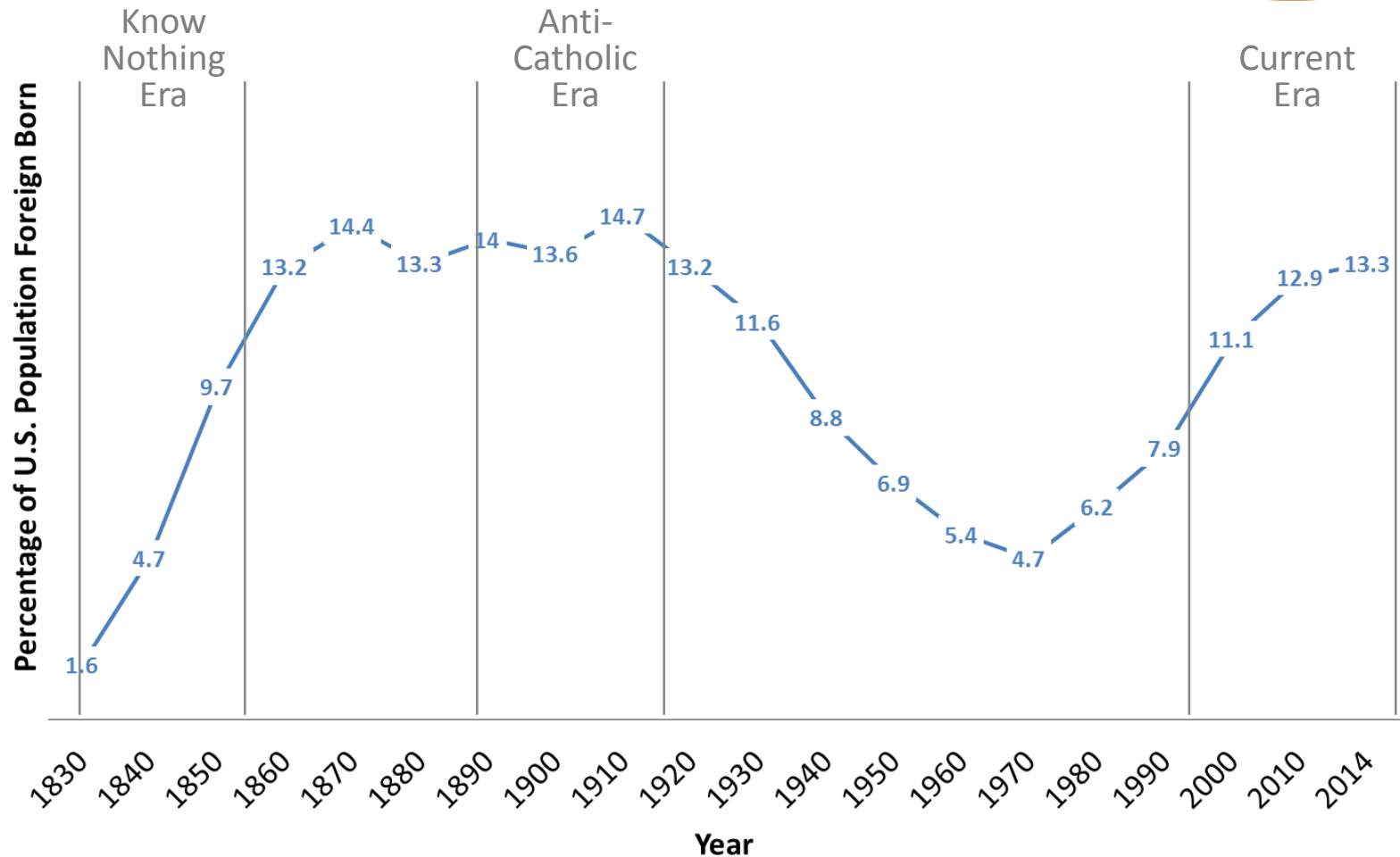


Source: General Social Survey 1975-2014

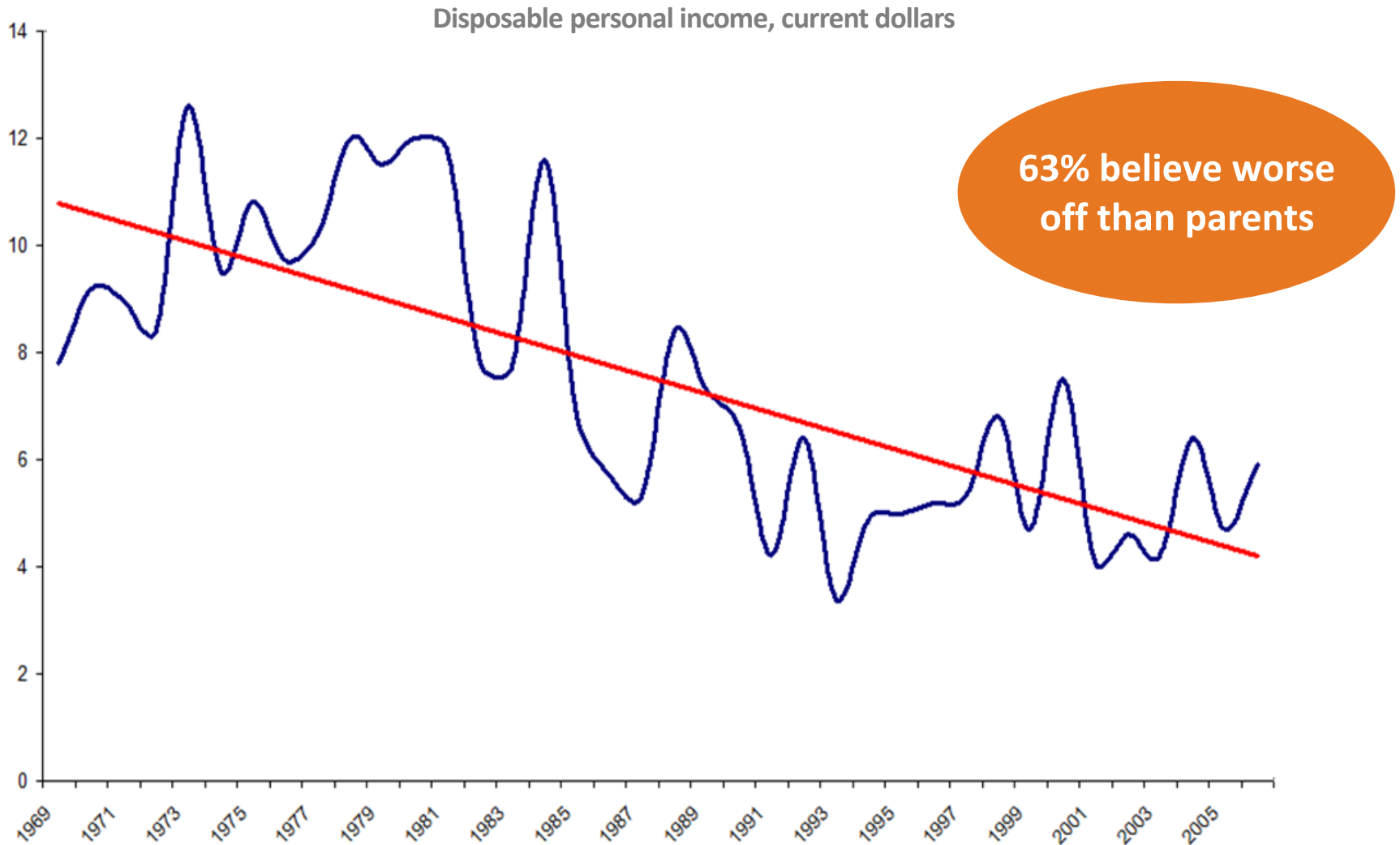
**But socio-demographic
change is altering
this landscape**

Increased Immigration Pressures

More non-white
than white babies
born in 2011



Economic Pressure on the Middle Class

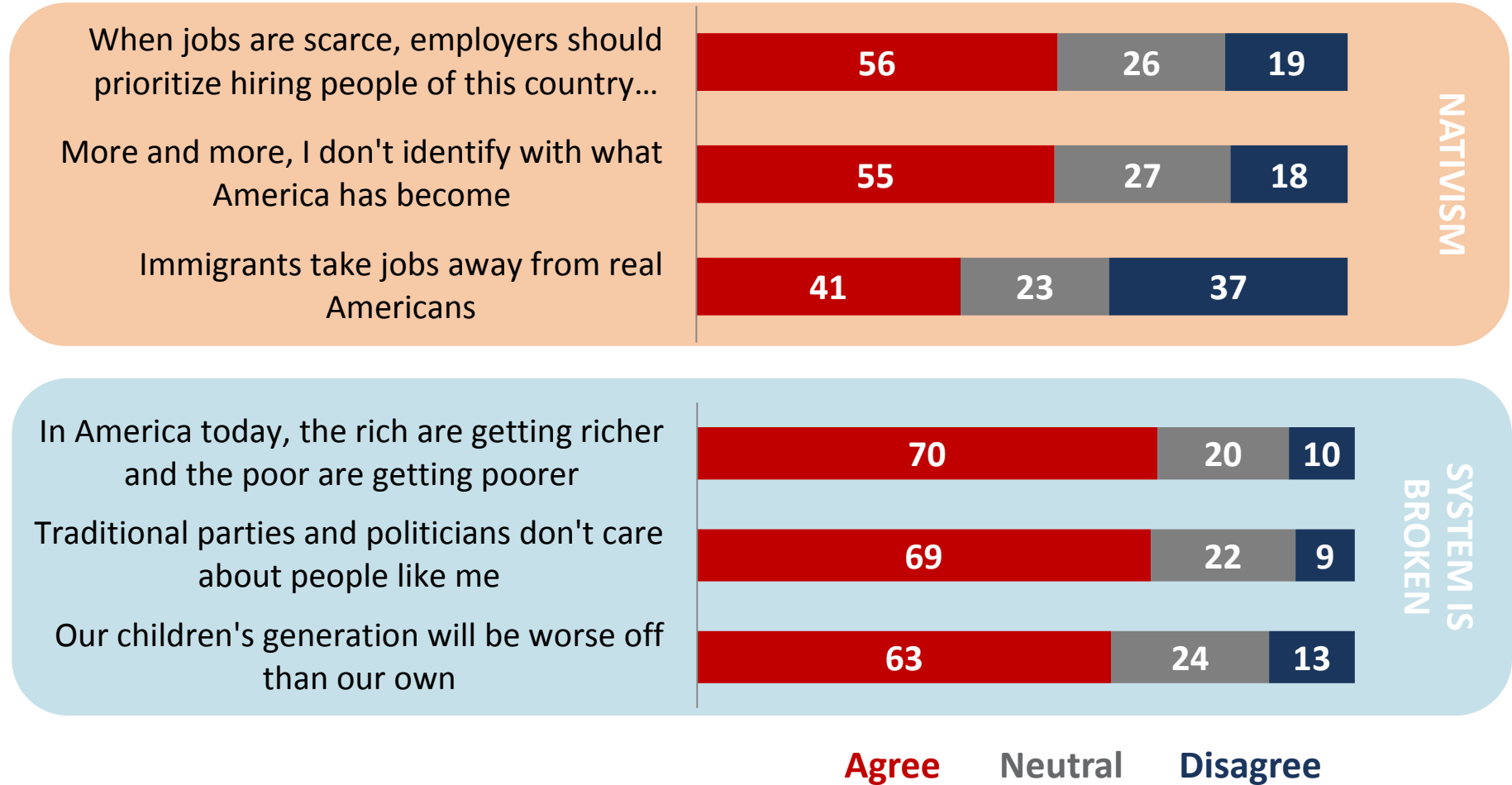




SHIFTING PARADIGM

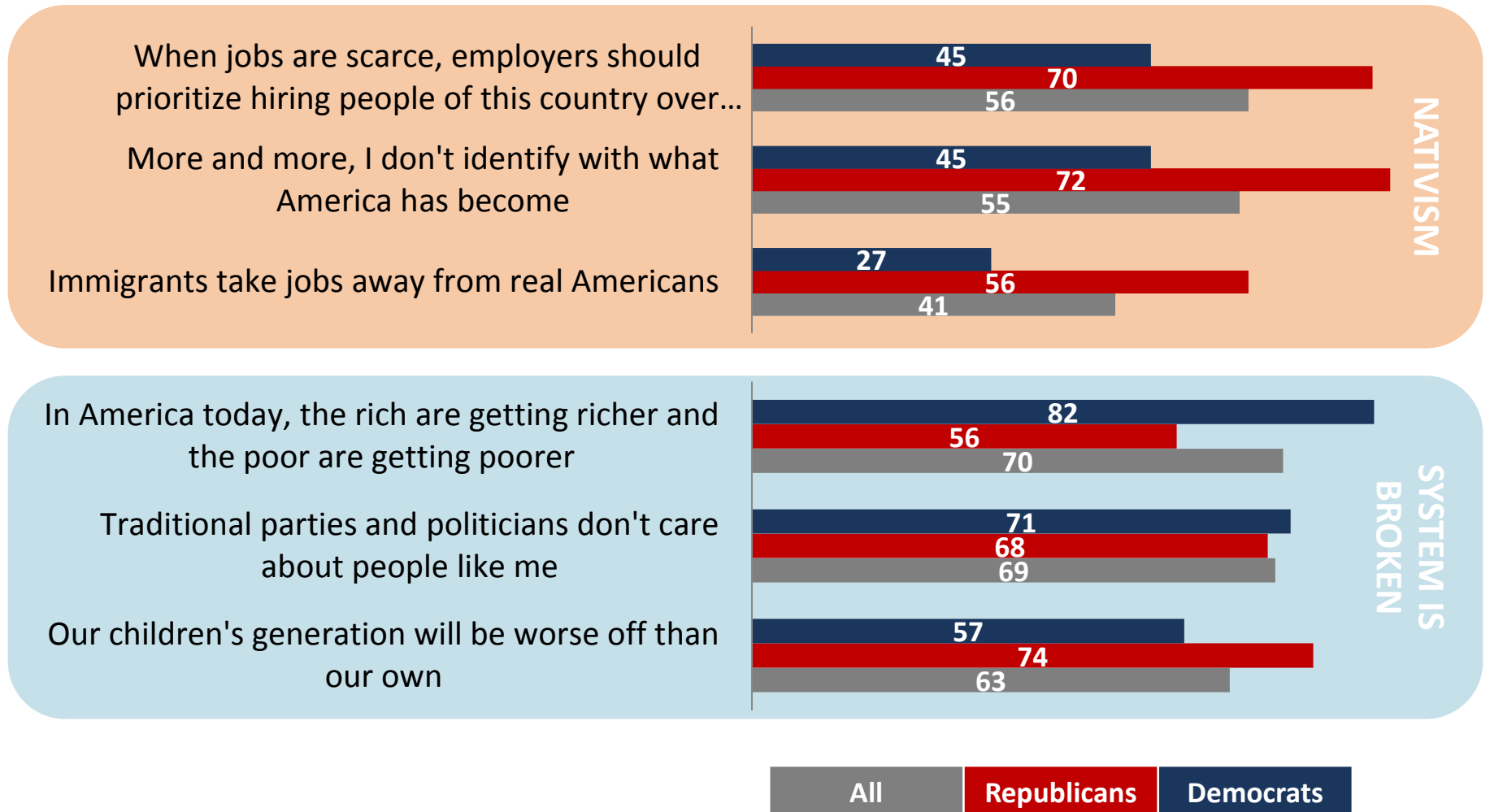
Rise of Nativism and
Populist Sentiment

New Populist Sentiments



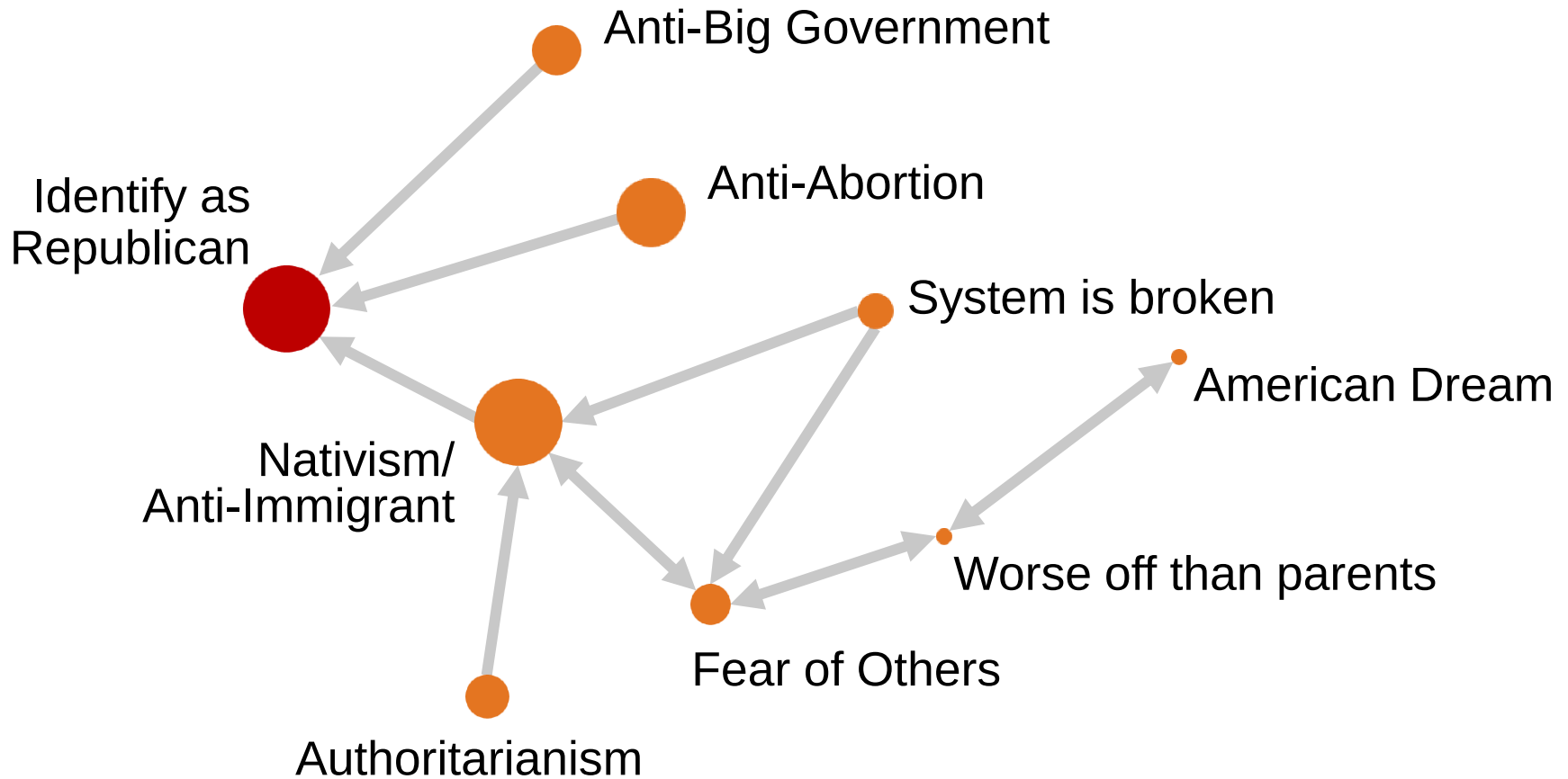
Source: Ipsos Polls, Sept 2015 & Jan 2016

Political Polarization of Nativism



Source: Ipsos Polls, Sept 2015 & Jan 2016

Nativism Increasingly Driving Republican Voters

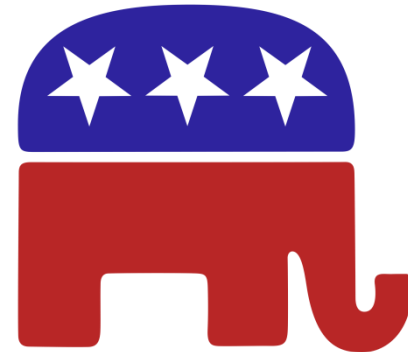


Differential Framing of Present Problem

The Rich are to Blame
Middle Class Economics

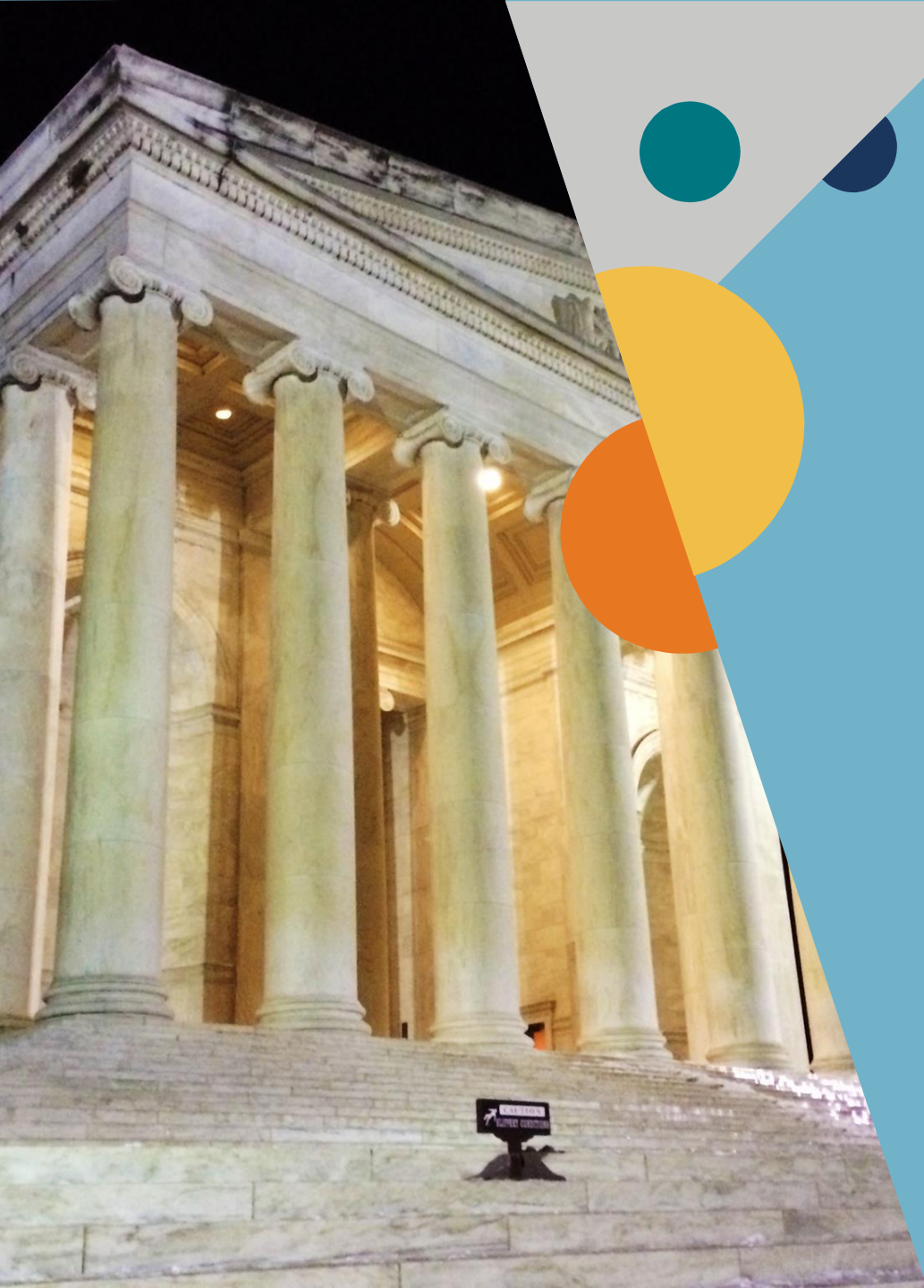
VS.

Nativism
Taking America Back



This is a Discontinuity Election!

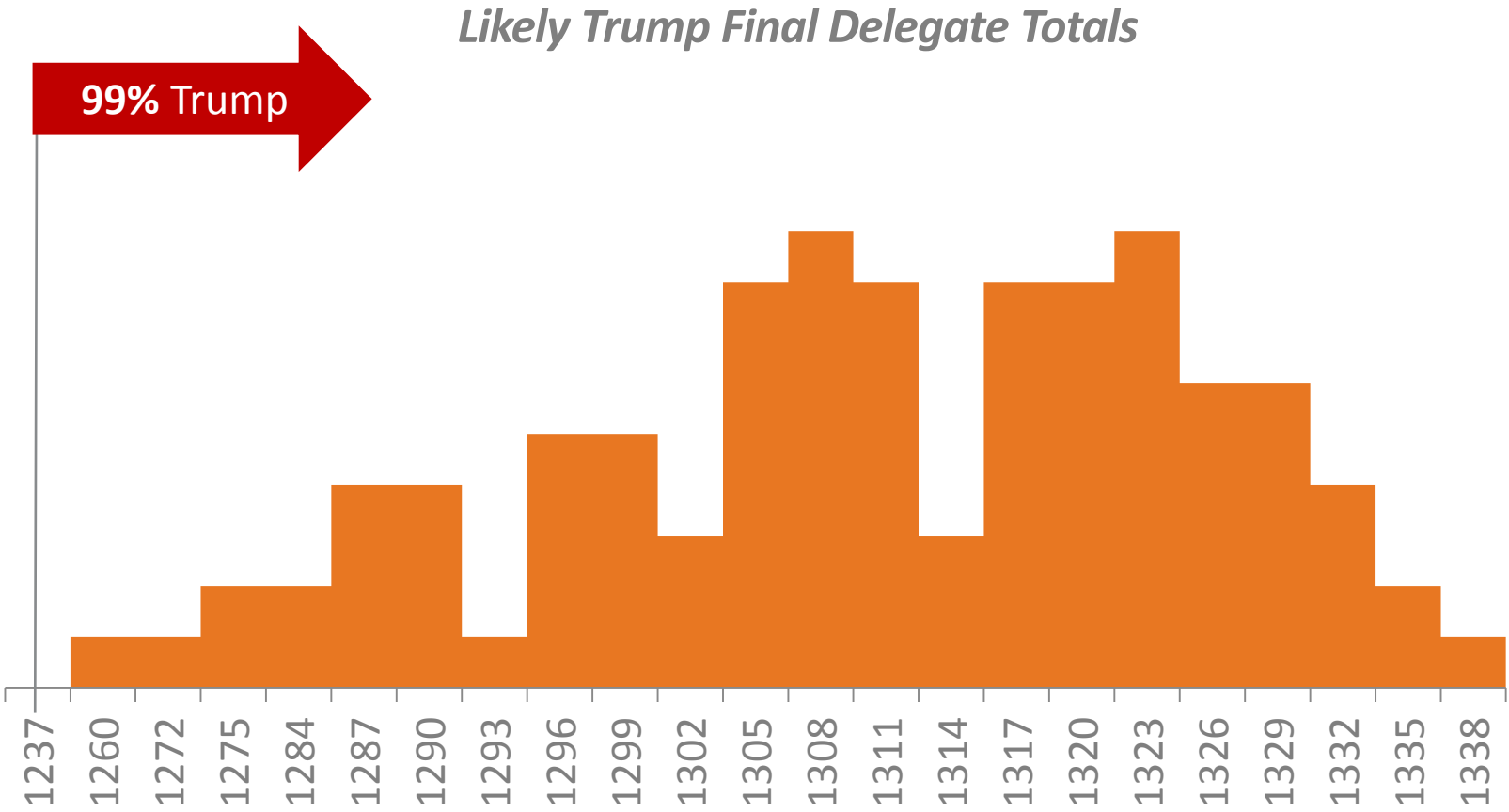




ELECTION UPDATE

Untangling the Election

The Primaries are Basically Over



ELECTION UPDATE

Handicapping the General Election



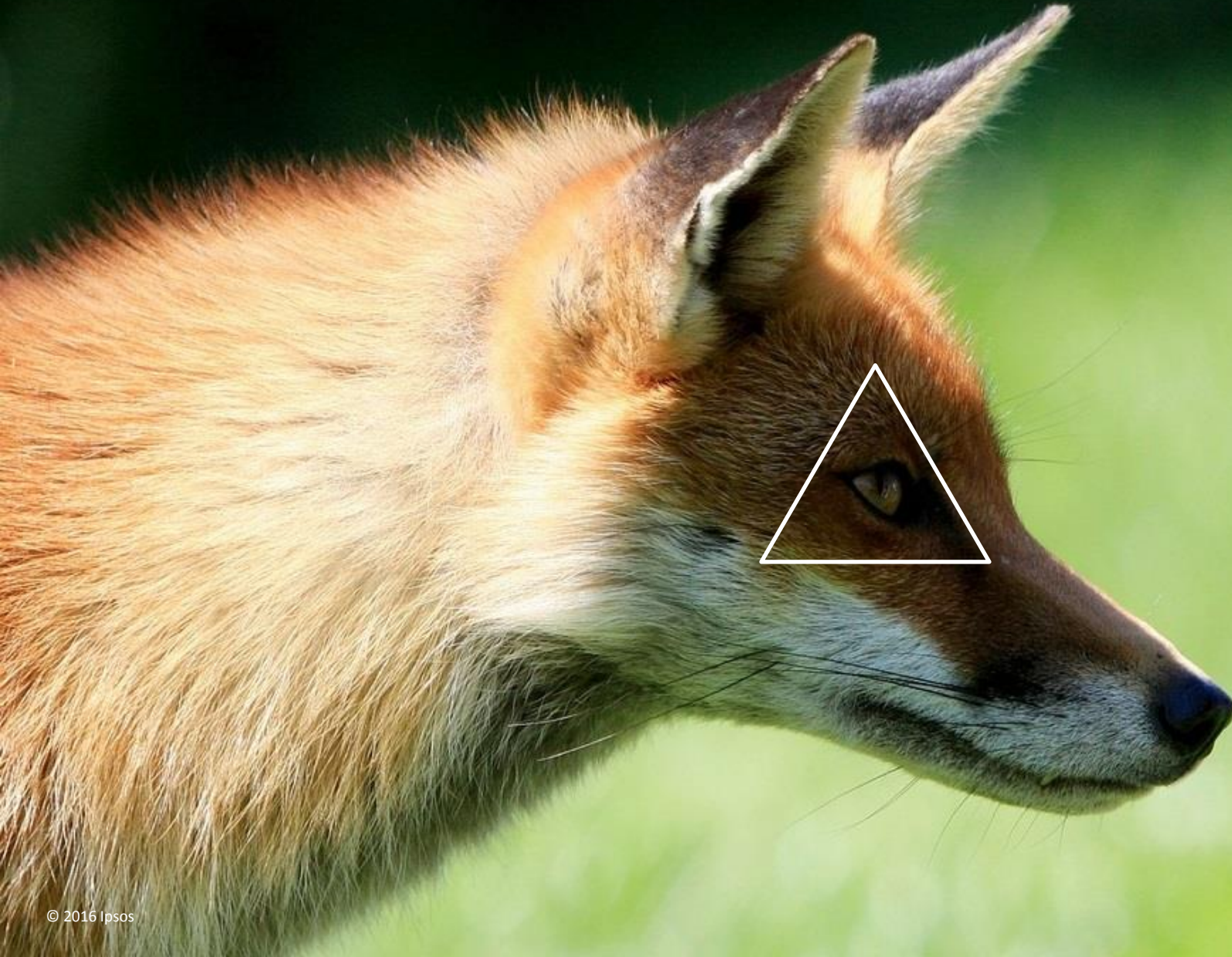
ELECTION UPDATE

Political Pundits Not Reliable: 50/50 Flip of the Coin



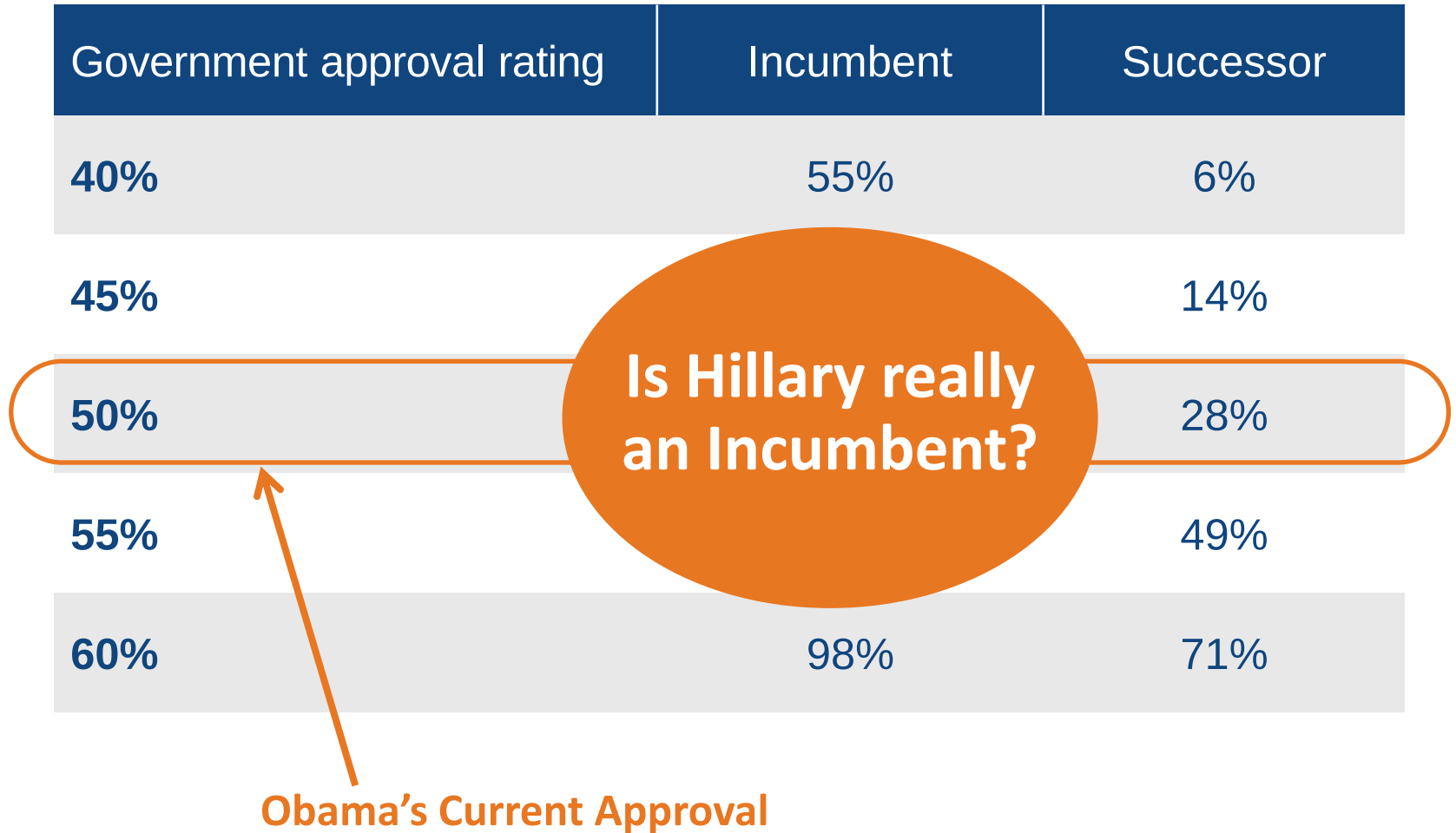
ELECTION UPDATE

Let's be Foxes and Triangulate



Start with our base rate model...

Base Rate model: This should be a Republican Year!

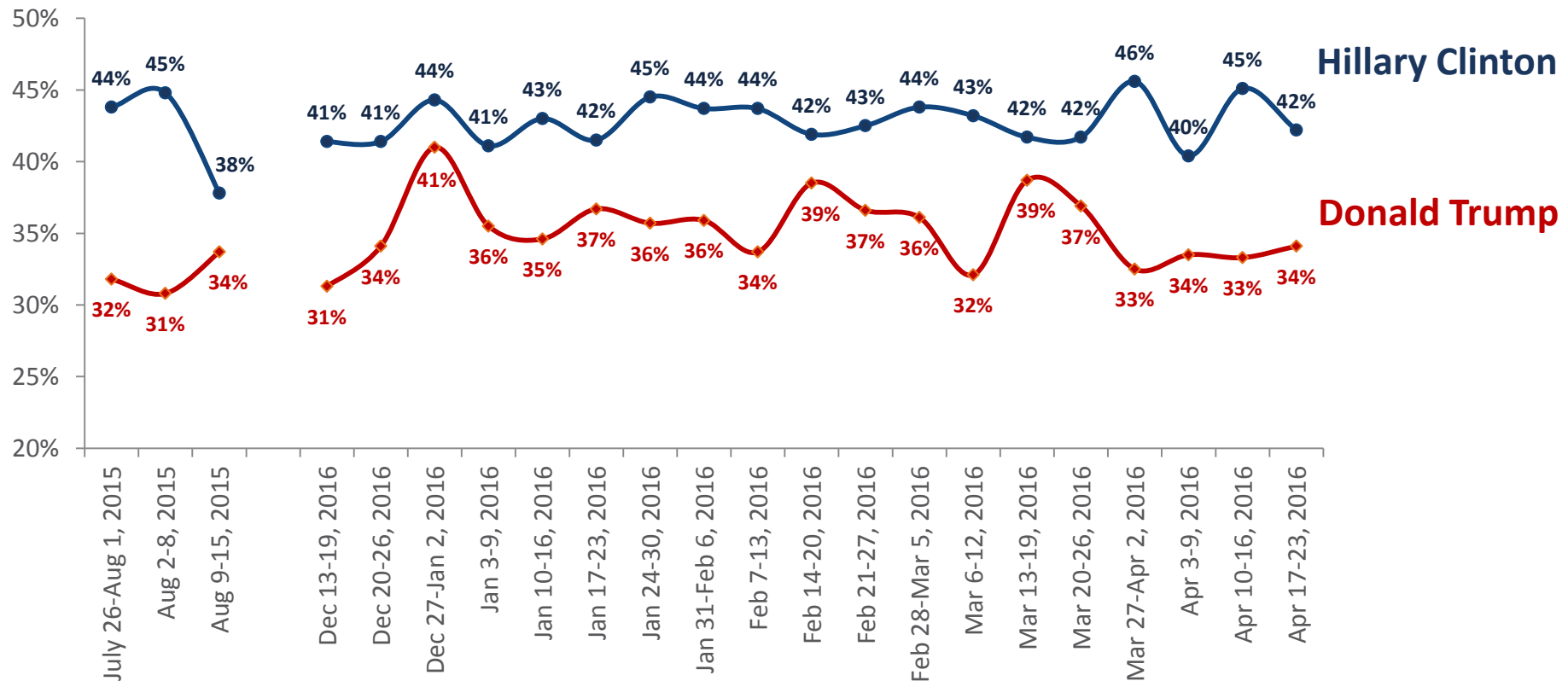


Source: Ipsos Analysis of 500+ elections

And the Polls?

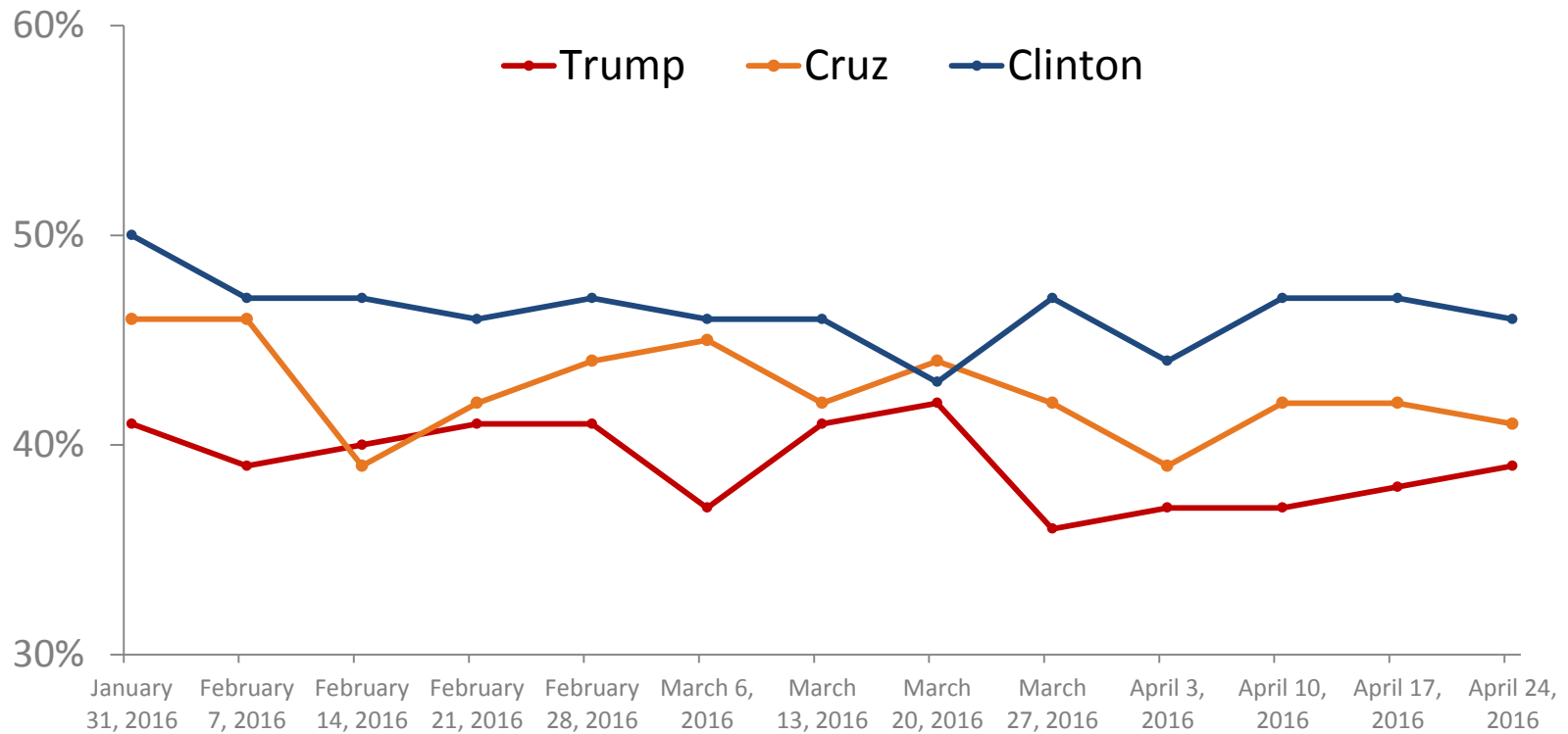
So far Looking Ugly for Trump

Registered Voters



Source: Ipsos/Reuters Poll 2015-2016

Favorability



Source: Ipsos/Reuters Poll 2015-2016

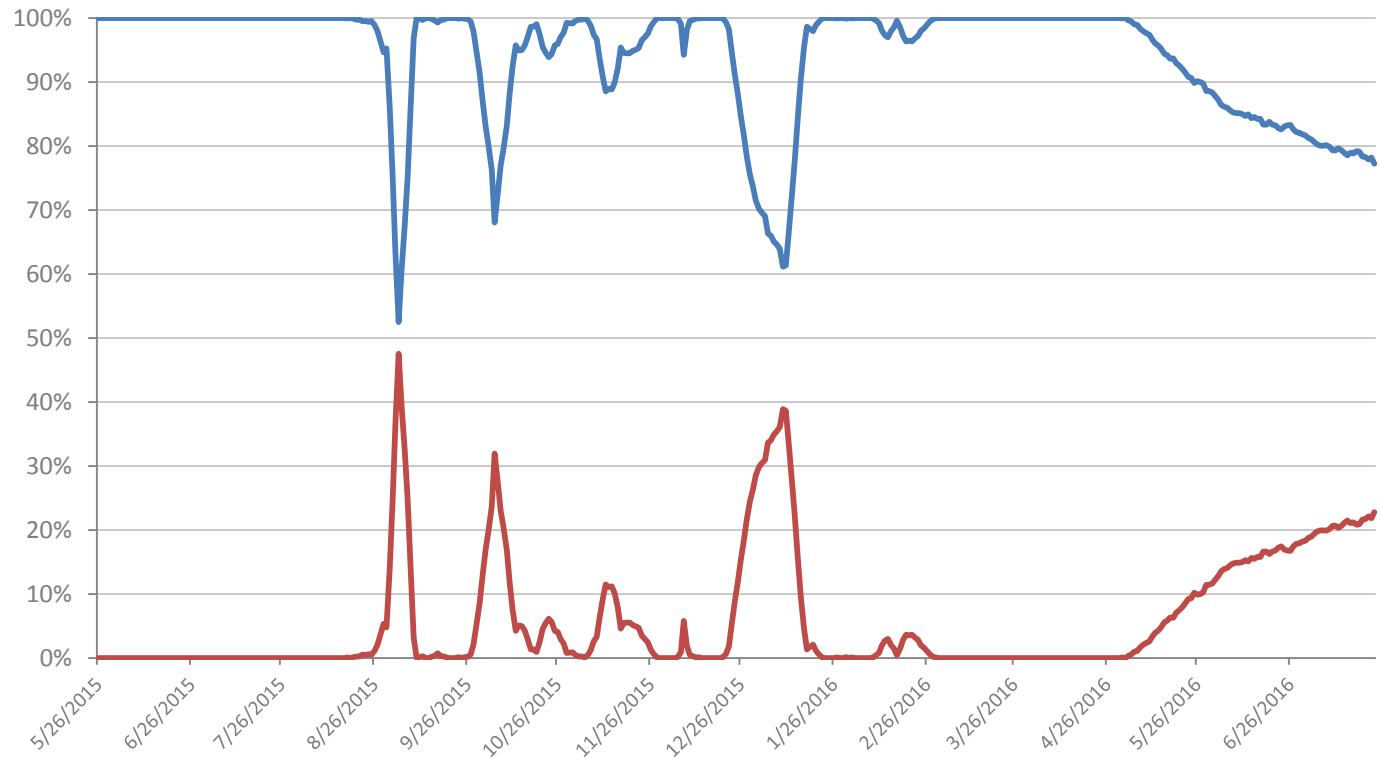
Polling Indicates Strong Clinton Advantage

Probability of Victory

Hillary Clinton

Donald Trump

**Trump's odds
of winning
general
election based
on polling**



Source: Ipsos/Reuters Poll, July 2015-April 2016

But polls can be
fuzzy at this stage

Polls Are Less Reliable Further From the Election

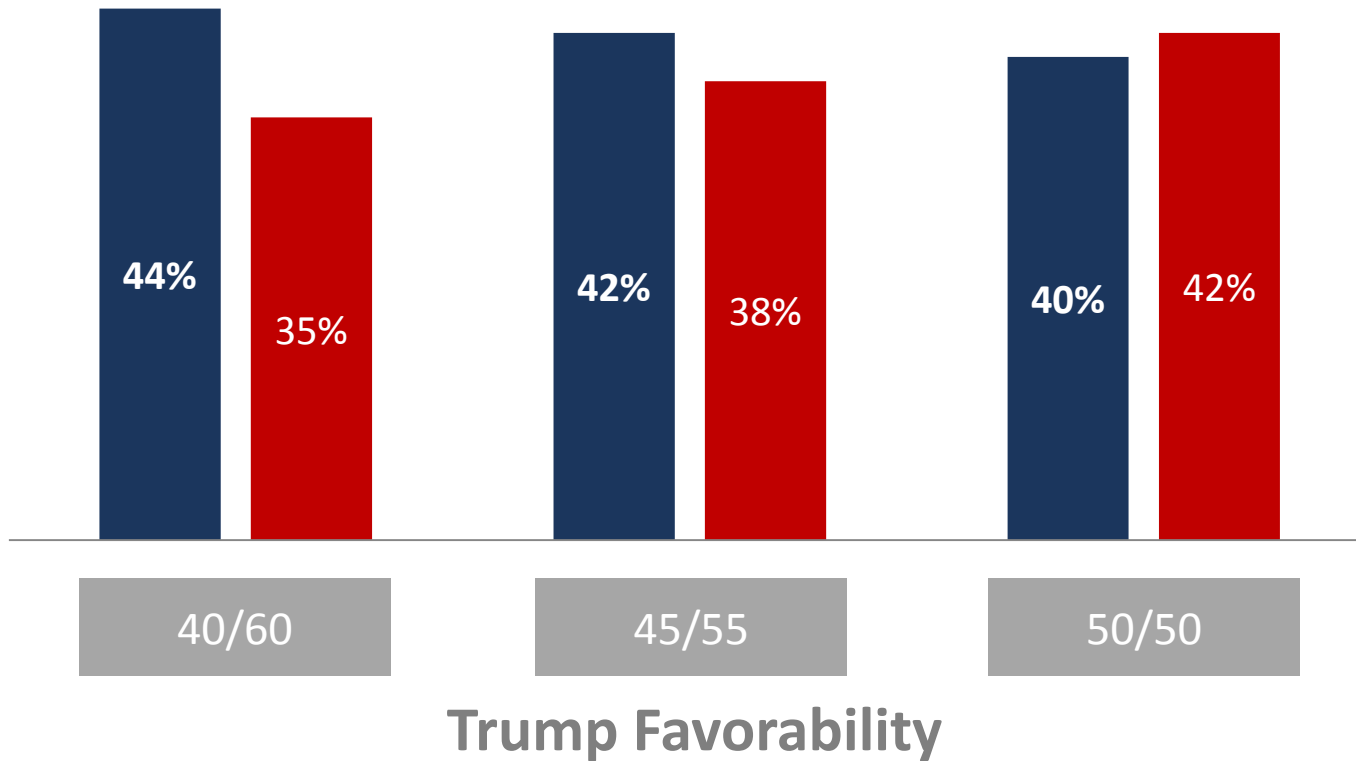
Time Before Election	Average Poll Error
One week	1.7%
One month	2.7%
Two months	3.8%
Three months	4.8%
Six months	5.8%
Nine months	6.9%
Twelve months	7.9%

Source: Ipsos analysis of 300 polls across 40 markets from 1980 through current

Making the Call?

Likely Voters: General Election

■ Clinton ■ Trump



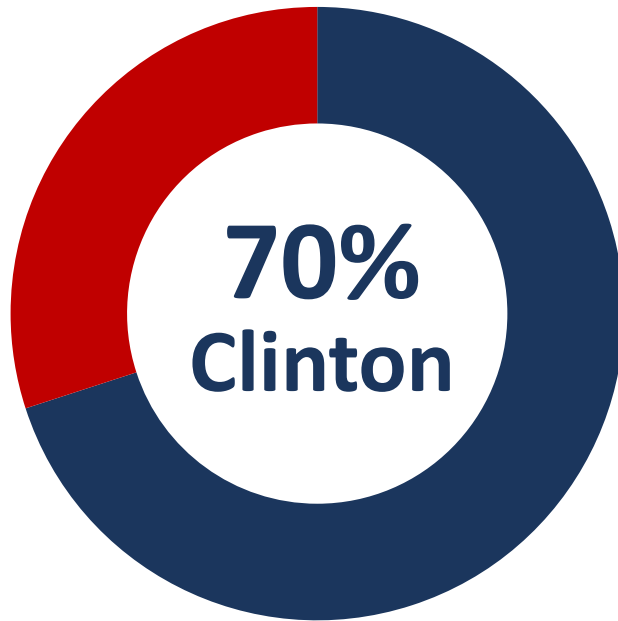
There is a dilemma

Combinatorial Approaches

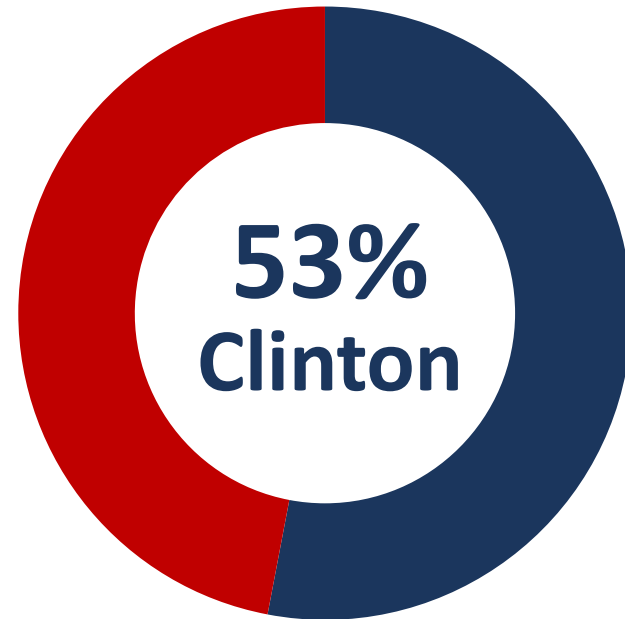
	Base Rate Model	Poll Aggregate	Pr(Hillary)
Traditional (50-50)	28%	77%	53%
Cliff (70-30)	28%	77%	43%
Clinton Optimistic	59%	77%	66%
Clinton Pessimistic	59%	57%	58%
Trump Optimistic	28%	57%	43%
Trump Pessimistic	28%	77%	53%
Average			53%

Our Challenge

The Market



Ipsos



Concluding Remarks

- **2016** will probably be a Republican year
- **This election is about** inequality and fear of the future
- **Expect** nativist-driven populism to continue in the United States



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