



America's Resilient Center and the Road to 2020
Results from a New National Survey

Methodology

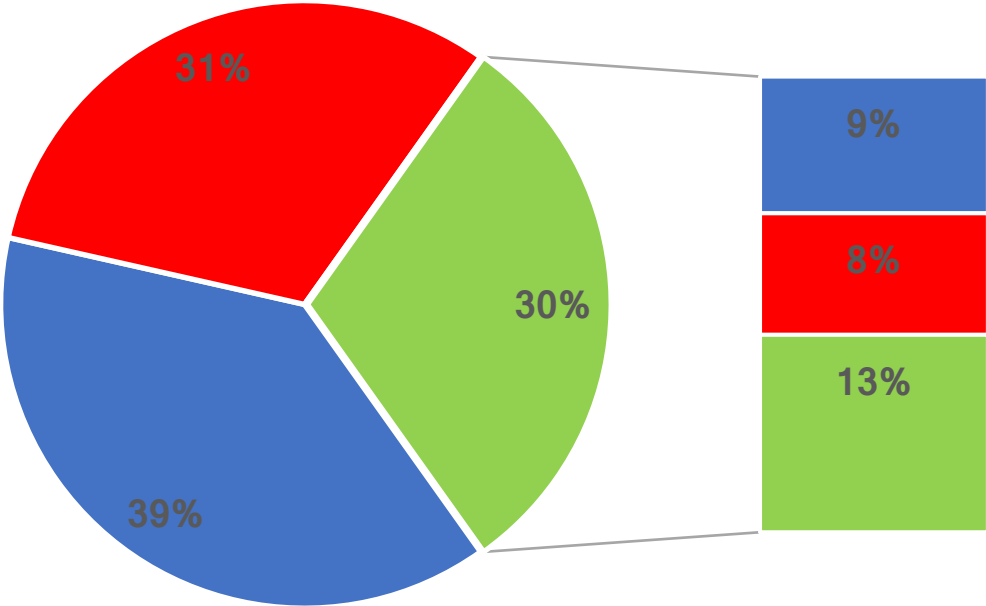
- Conducted by Expedition Strategies October 9-16, 2018.
- 1090 total online interviews nationwide
- Registered voters likely to vote in the 2018 general election
- Margin of error: $\pm 2.97\%$ (higher among subgroups)

Top Takeaways

- The 2020 electoral landscape favors Democrats – if they build a big tent
- Strong support for pragmatic progressivism – local solutions, private sector involvement, help not handouts, free enterprise
- Two areas for stronger federal involvement: health care and worker wages
- Sleeper issue for 2020: The deficit

Building an enduring majority

Democrats have an advantage heading into 2020

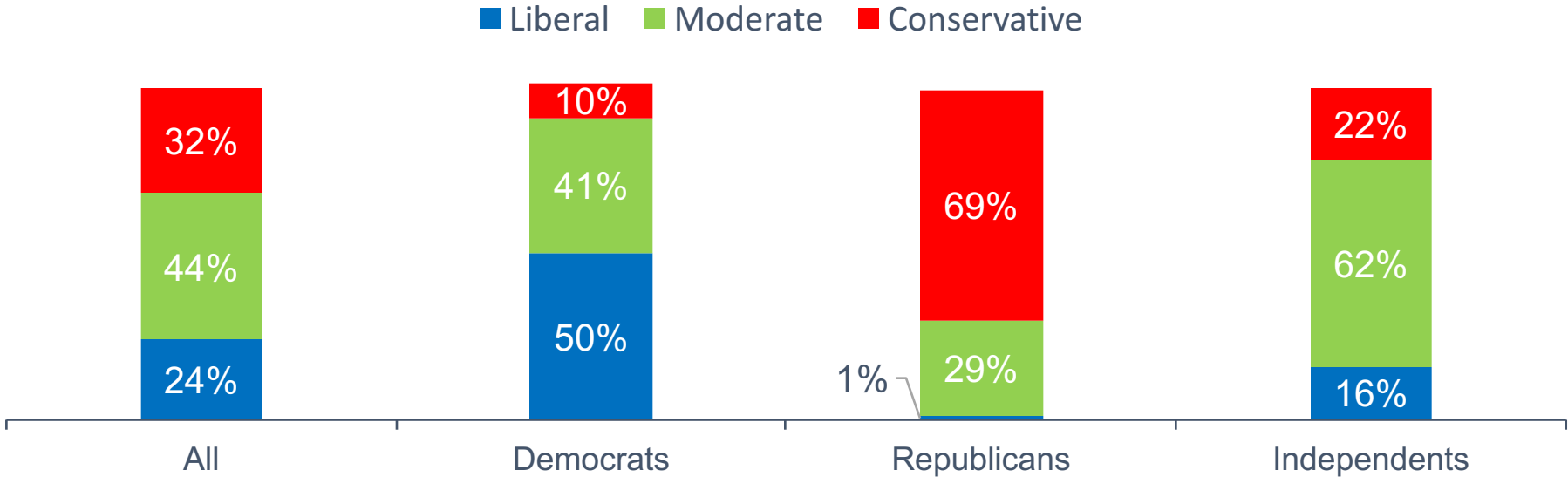


■ Democrat ■ Republican ■ Lean D ■ Lean R ■ Neither ■ Independent

TOTAL

- Dem with leaners: 48%
- Rep with leaners: 39%
- Independent: 13%

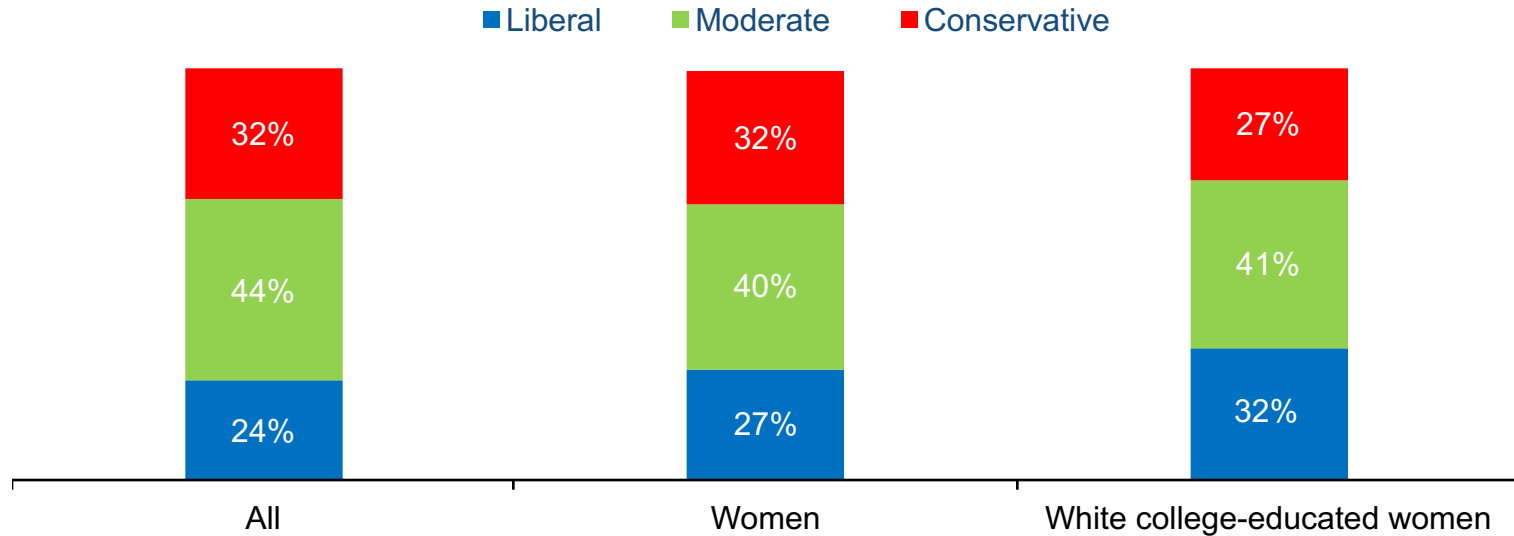
Moderates matter more than ever



Q62. Do you generally consider yourself liberal, moderate, or conservative?

Women and white college-educated women are moderates too

Women Voters by Ideology



Q62. Do you generally consider yourself liberal, moderate, or conservative?

Moderates are the “deciders”

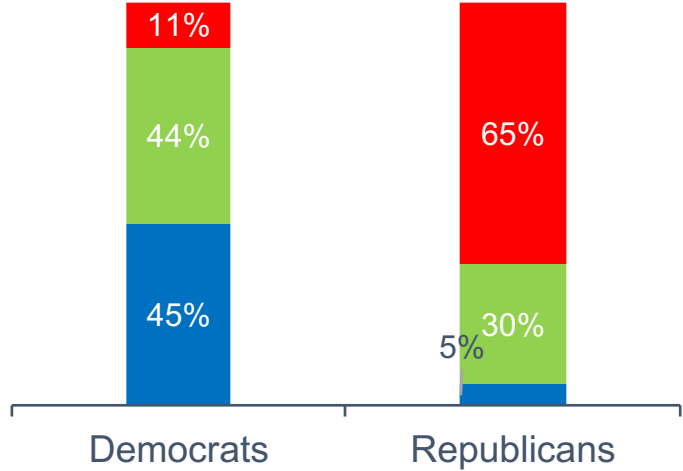
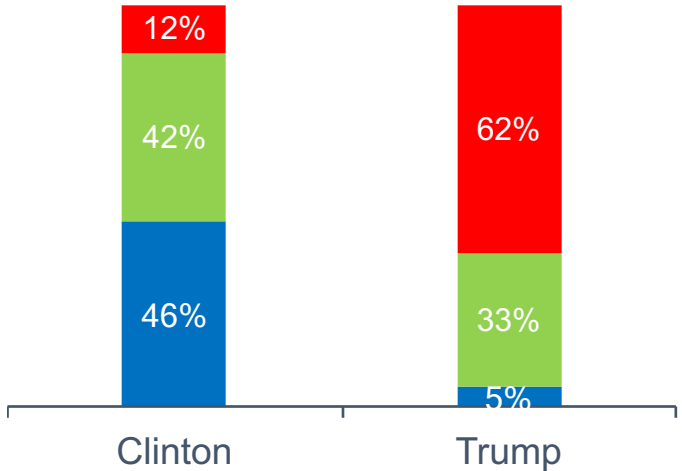
Breakdown of Vote by Ideology

2016

2018

■ Liberal ■ Moderate ■ Conservative

■ Liberal ■ Moderate ■ Conservative



Source: Exit polls

Democratic gains in Trump territory

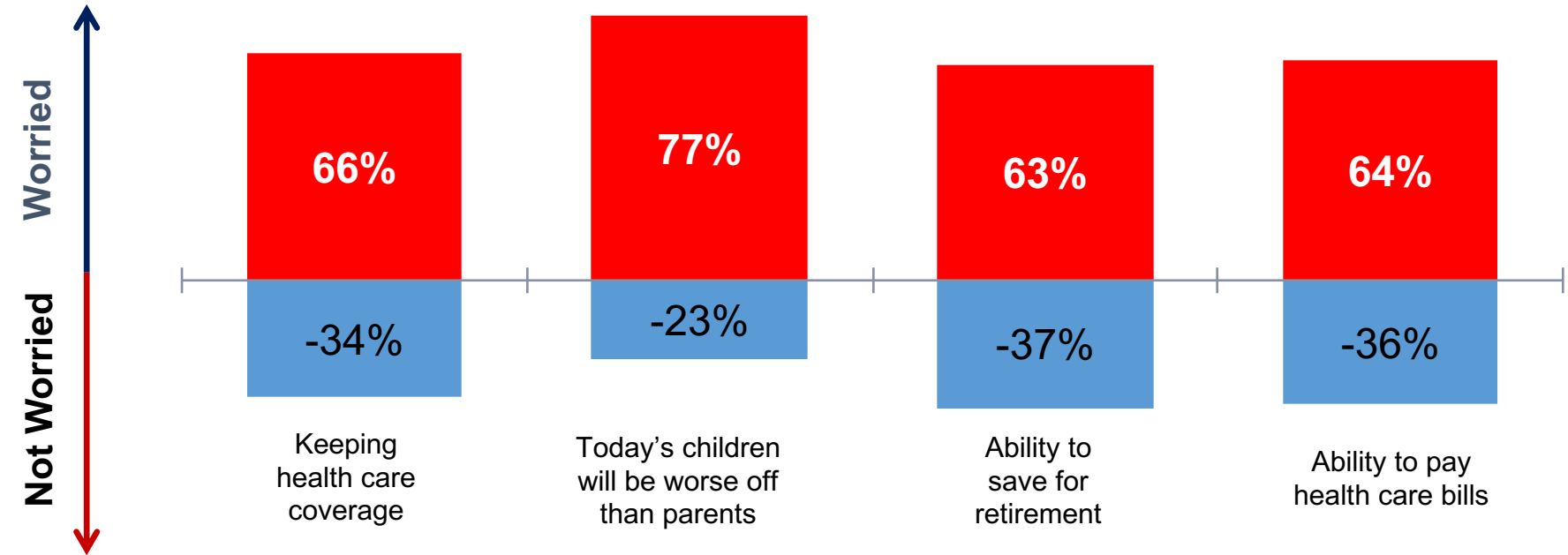
District	Candidate	Margin for Trump - 2016
IA-01	Abby Finkenauer (Blum)	+3.5
IA-03	Cindy Axne (Young)	+3.5
IL-14	Lauren Underwood (Hultgren)	+3.9
MI-11	Haley Stevens (open)	+4.4
MN-02	Angie Craig (Lewis)	+1.2
NJ-02	Jeff Van Drew (open)	+4.6
NJ-11	Mikie Sherill (open)	+0.9
NY-11	Max Rose (Donovan)	+9.8
NY-19	Antonio Delgado (Faso)	+6.8
OK-05	Kendra Horn (Russell)	+13.4
SC-01	Joe Cunningham (open)	+13.1
VA-02	Elaine Luria (Taylor)	+3.4
VA-07	Abigail Spanberger (Brat)	+6.5

A radically pragmatic big tent agenda

Key Finding #1

Americans want help, not handouts.

Despite a strong economy, Americans are anxious



Q24. Now you will see some concerns people may have. Please tell us how worried you are about each of the following?

Americans nonetheless prefer ladders over nets

Thinking about the economy, which is closer to your view?

Government policies **should try to cushion the impact of economic change** by supplementing peoples' incomes and guaranteeing a government job for people who can't find work

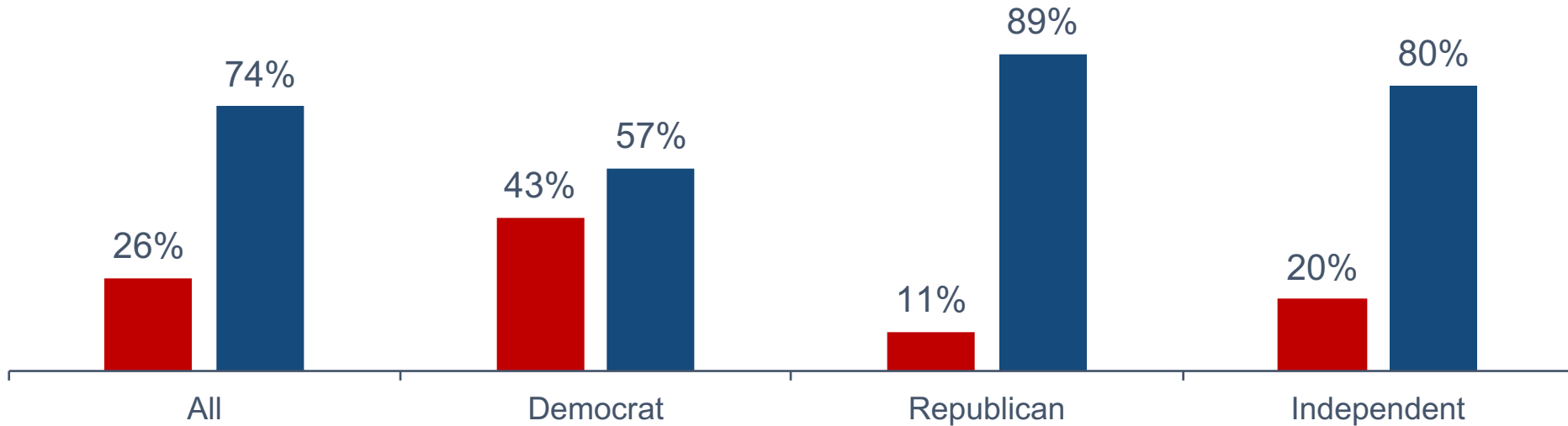
Government policies **should help Americans succeed in a time of change** by making job training affordable and creating more opportunities to save for education and retirement



Opportunity over outcomes

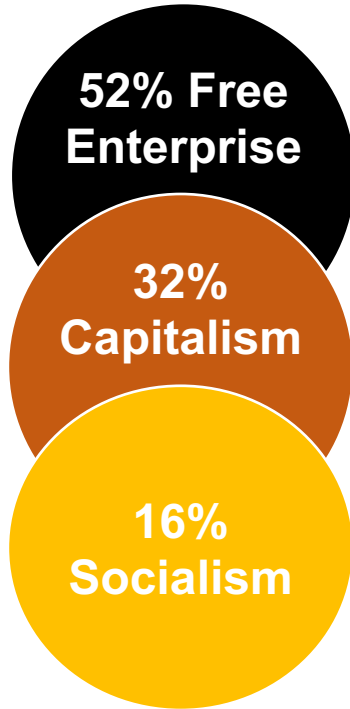
The government should guarantee that **all Americans have health care and enough money to live comfortably**

Any American who is **willing to work should be able to earn enough to have affordable health care and live comfortably**

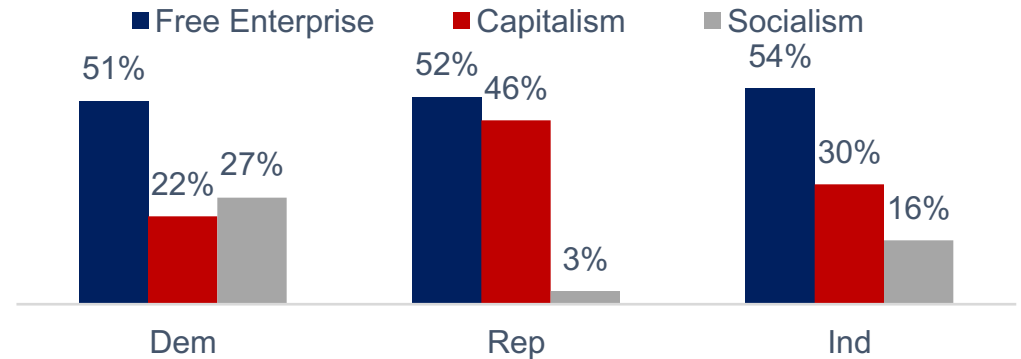


Q27. Which best describes your view of how the American Dream should work?

Strong belief in “free enterprise” and self-agency



Preference by Party Self-ID

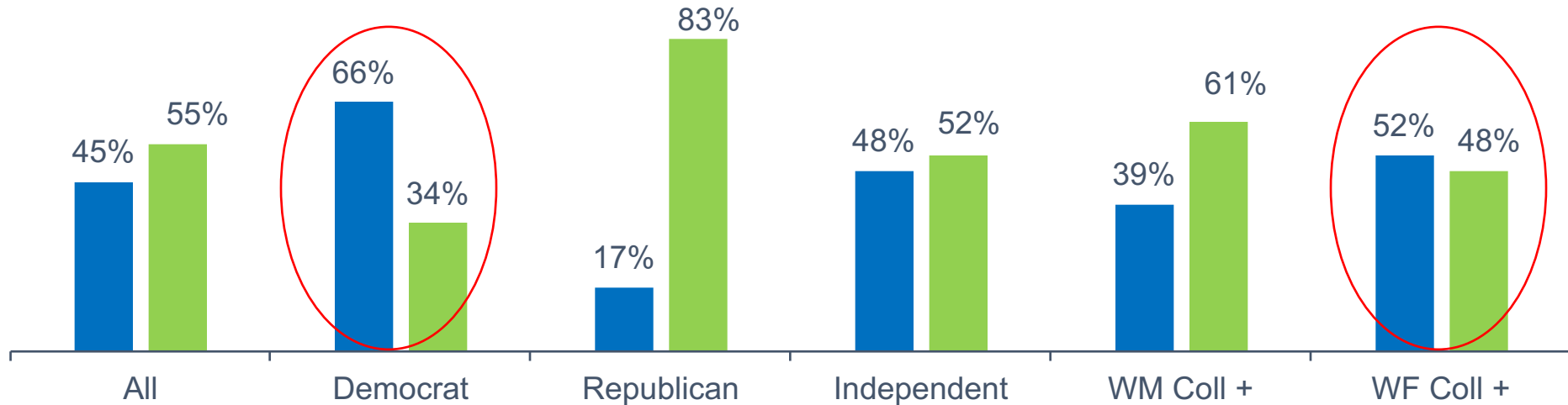


Q13. Which do you prefer: socialism, capitalism, or free enterprise?

Preference for growth over redistribution

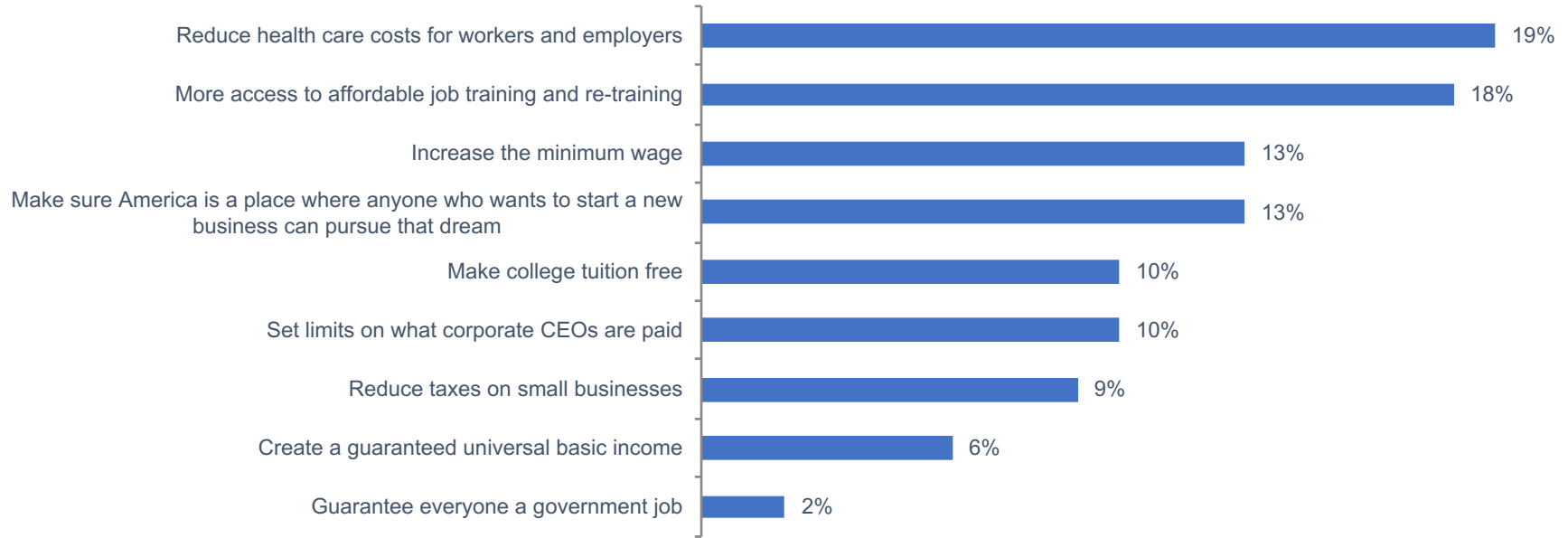
Reducing the income gap between the wealthy and the poor in the United States

Making the economy more successful – especially in areas that have been left out of today's prosperity



Guaranteed income and jobs rank last as solutions

Which of the following is the best way to reduce the gap between the wealthy and the poor in the United States?

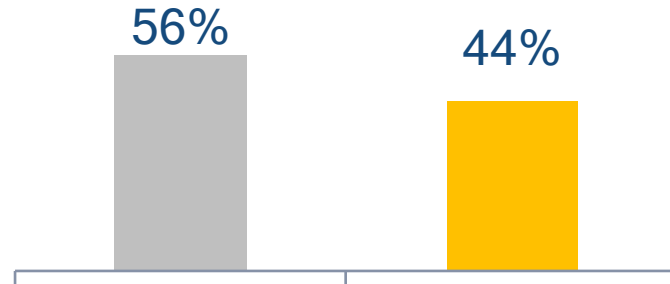


Better access to skills is preferable to less regulation

Which of the following do you think the economy needs more?

More of an emphasis on making sure that **everyone who wants training or education can get it**

More of an **emphasis on low taxes and low regulations**

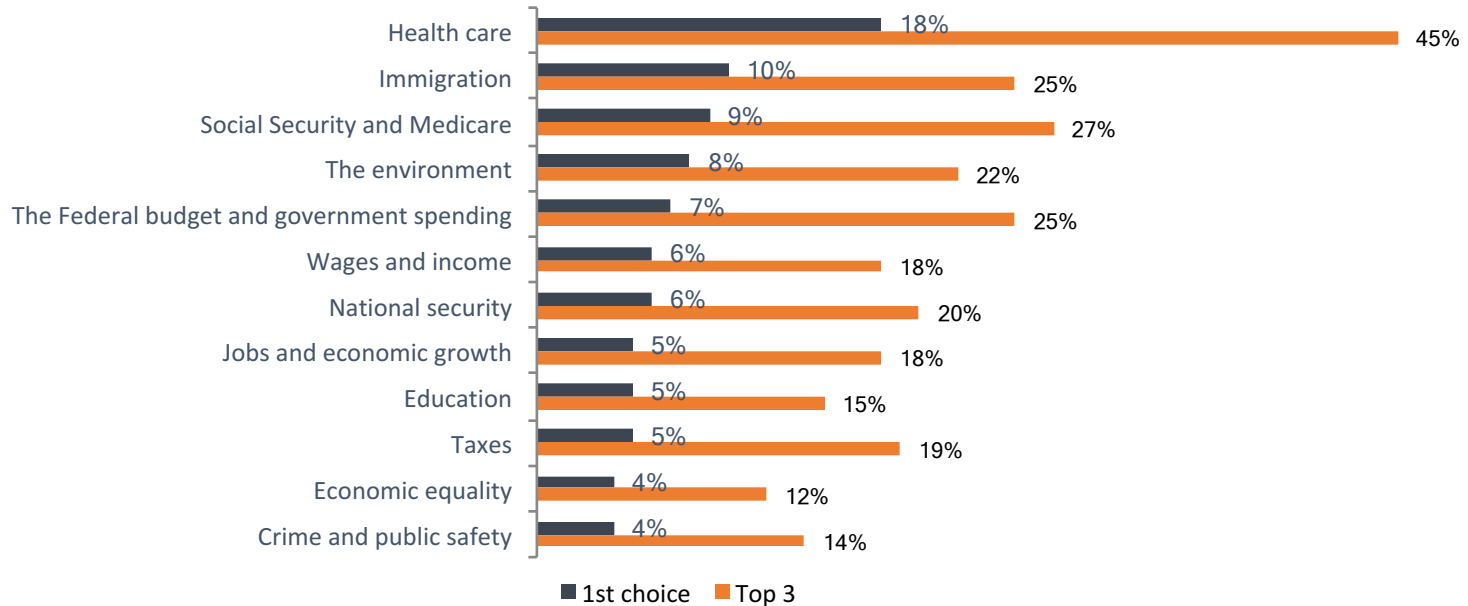


Key Finding #2

Voters are open to a bigger federal role in health care
– but the messages are mixed.

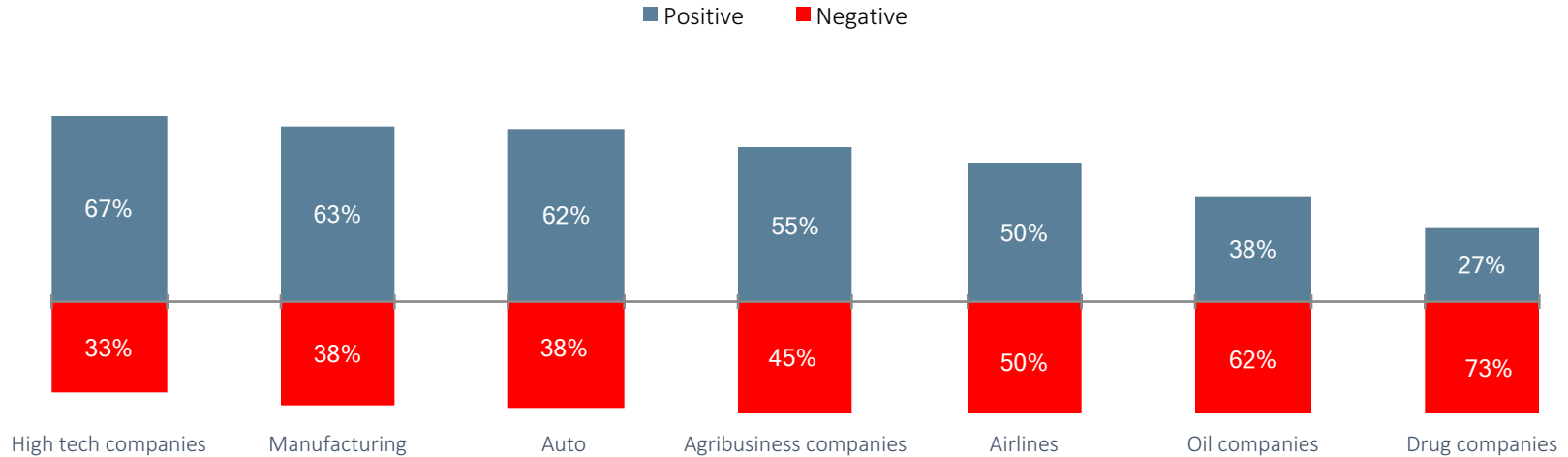
Health care trumps all other issues

Top Issue for Congress to Address



Americans' biggest health care concern is drug prices

Please rate how you feel about each of the following US industries.



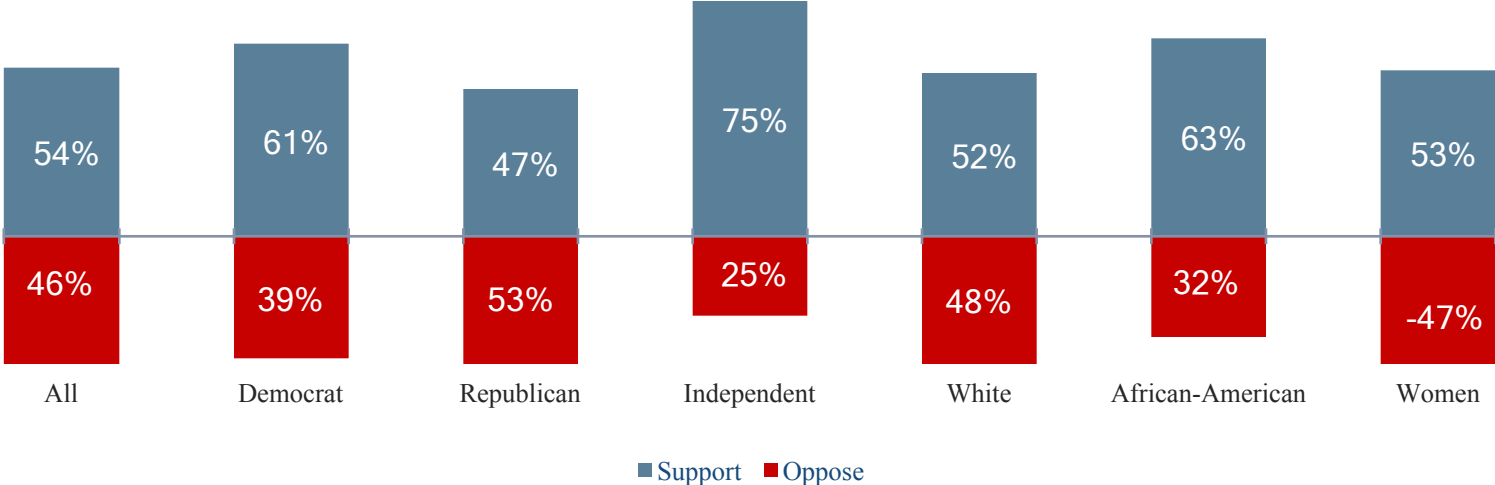
83% of Americans worry drug companies “are charging too much.”

Health care is a top concern for women

Concerns: Very Worried	WM <Coll	WM Coll +	WF <Coll	WF Coll +
Drug companies are charging too much	53	48	61	61
Keeping health care coverage	26	25	44	37
Your ability to pay health care bills	19	15	41	32

Unexpectedly strong support for nationalized health care

Support or Oppose: Change the current health care system so everyone gets health care through Medicare instead of through people's place of work or instead of buying it directly.



But some big caveats...

- Voters are unaware of the tradeoffs and costs (e.g., 55% of voters believe a national health care system will save money)
- 85% of voters say they are worried about the size of the national debt
- 72% say their taxes are “too high”

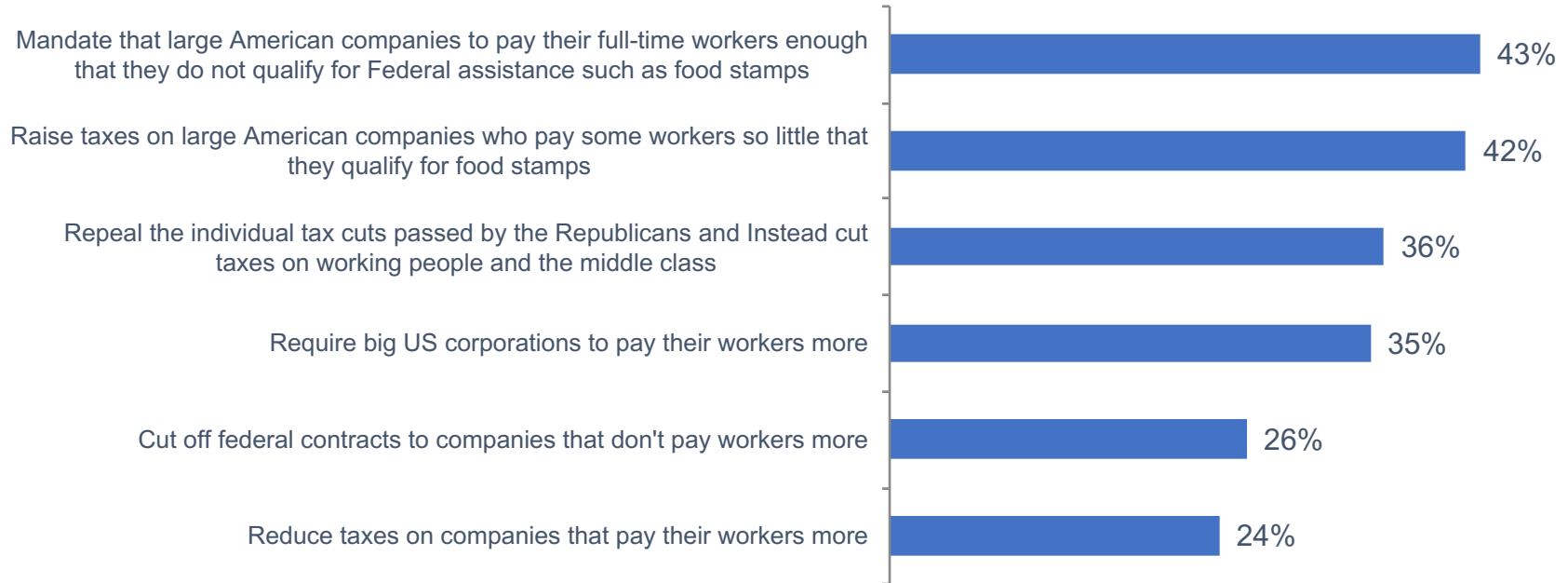
Bottom line: “Medicare for all” is not a silver bullet

Key Finding #3

Big Business is not the enemy – but companies need to step it up on wages.

Voters support federal intervention on wages

Proposals: Strongly Support



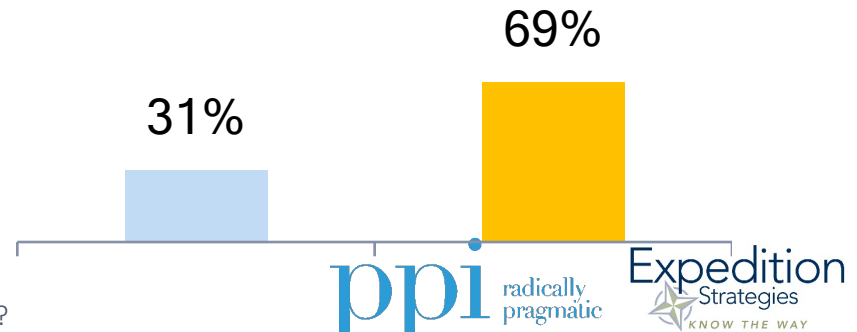
Q28. Here are some policy ideas Congress could consider after the next election. Please tell us if you support or oppose each of these Congressional proposals.

But voters also prefer carrots over sticks

Which do you think the government should make a higher priority?

Punishing companies that do not pay their workers enough

Giving companies **incentives** to invest more in their workers



Monopolies and lack of competition are not major concerns for voters

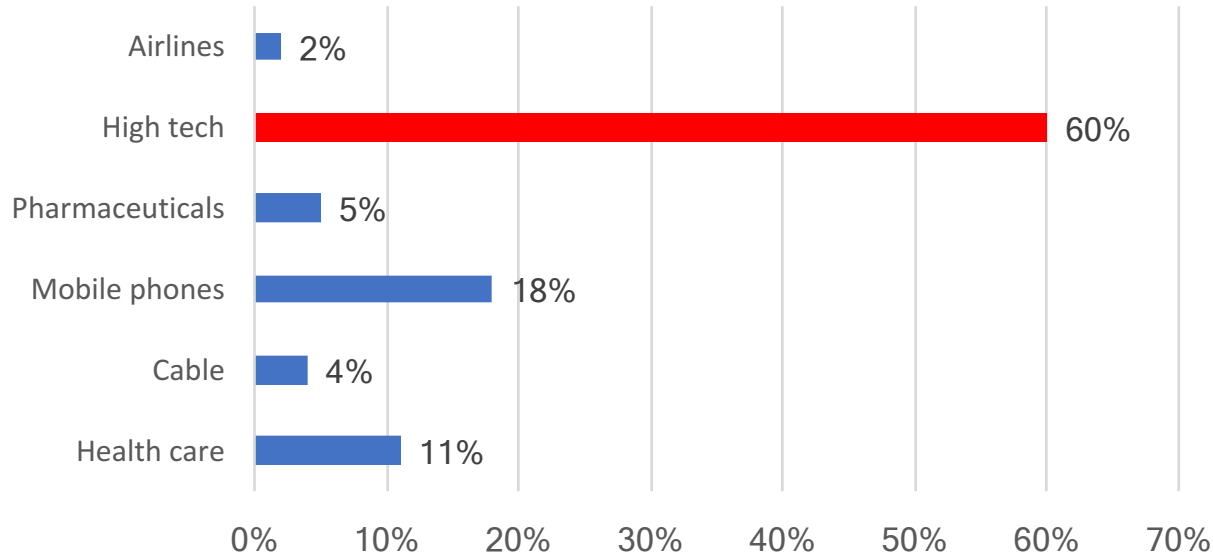
- Just 4% of voters put “monopolies” as a top-three issue for Congress to address
- 67% prefer a candidate who says “we need to be careful about breaking up large American companies ... that are innovative and successful”

Few signs of tech-lash – Big Tech is popular

- 67% say America's high tech companies are “mainly a positive force” in society.
- 68% agree big tech companies “reflect America's strengths in innovation... and are a key advantage against China.”
- 71% say the size of big tech companies is a “sign the economy is working”

But Americans are concerned about privacy and prefer a national approach to the issue

Which service concerns you the most when it comes to privacy and data protection?

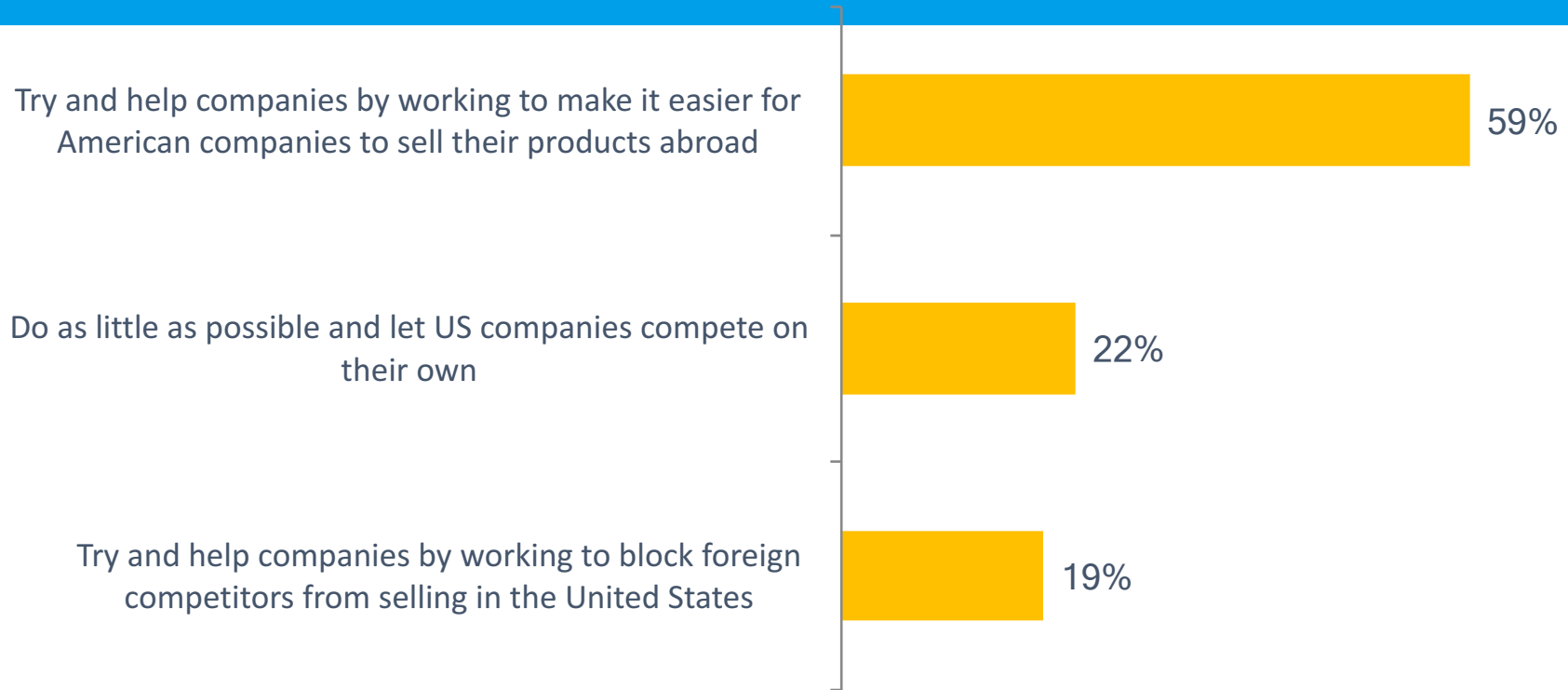


58% of voters prefer national over state regulation of privacy rights

Key Finding #4

Nationalism is a failing strategy – perhaps even among Trump’s core supporters.

Few voters support raising barriers to trade

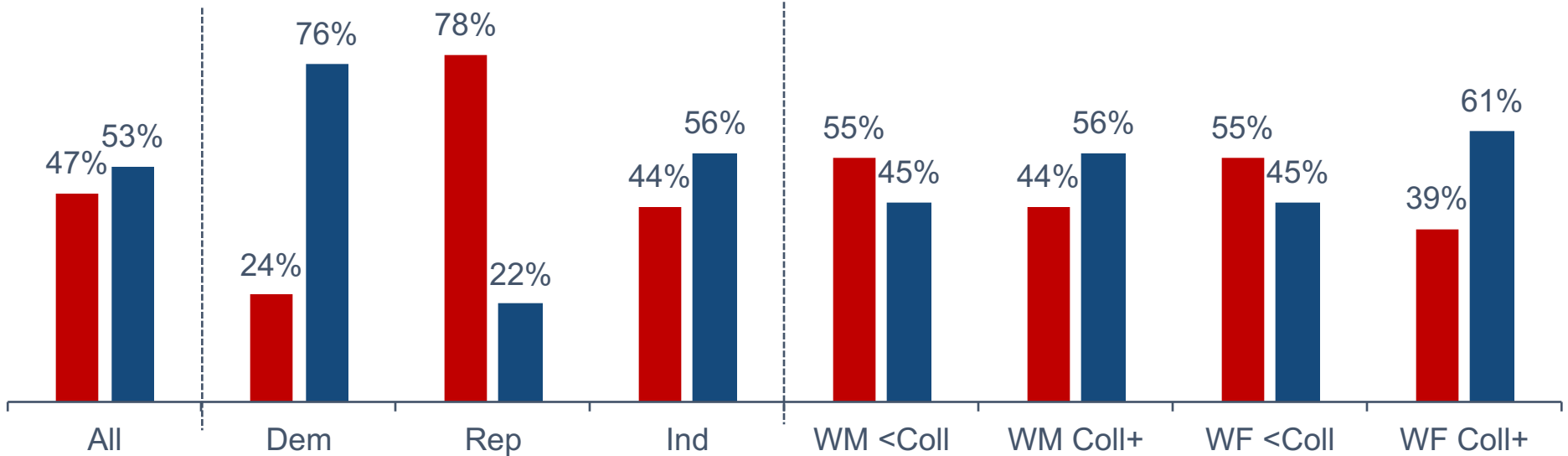


Q18. When it comes to competition from foreign companies, what should the position of the U.S. government be?

Tariffs are unpopular – except with Trump's base

They are a **good idea** that will eventually be a benefit to the country.

They are a **bad idea** that will do more harm than good.

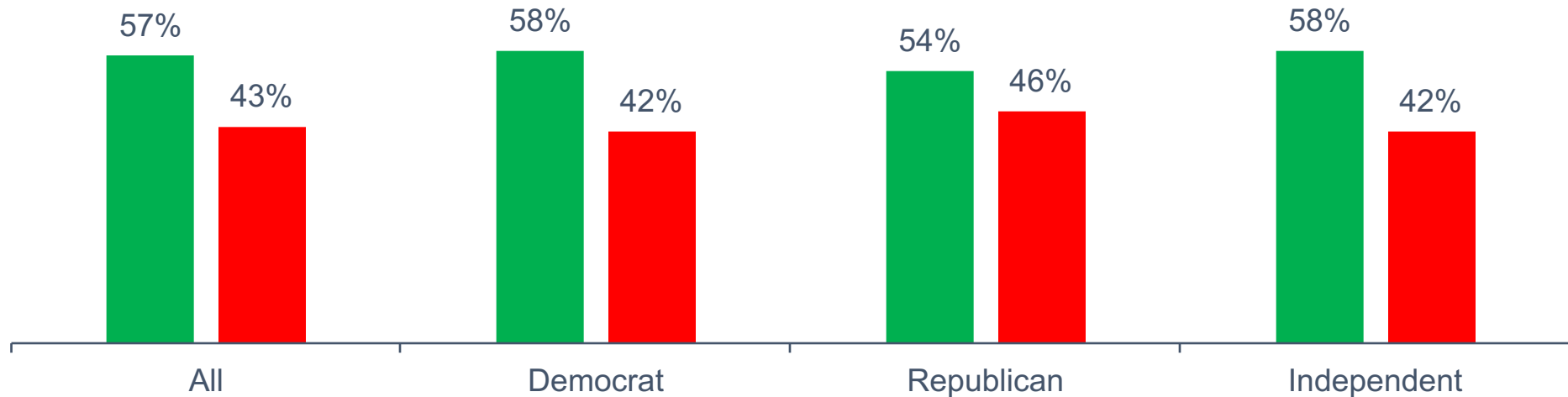


Q31. Thinking about President Trump's aggressive use of tariffs against American trading partners including China, which is closer to your view?

Americans generally reject isolationism

The United States **should play a leadership role** helping democracies around the world that are dealing with threats from authoritarian countries like Russia and China.

The United States **should play less of a role** in trying to support democracy around the world because the costs and risks are too high.



Key Finding #5

Sleeper issues for 2020: Deficits, immigration and energy

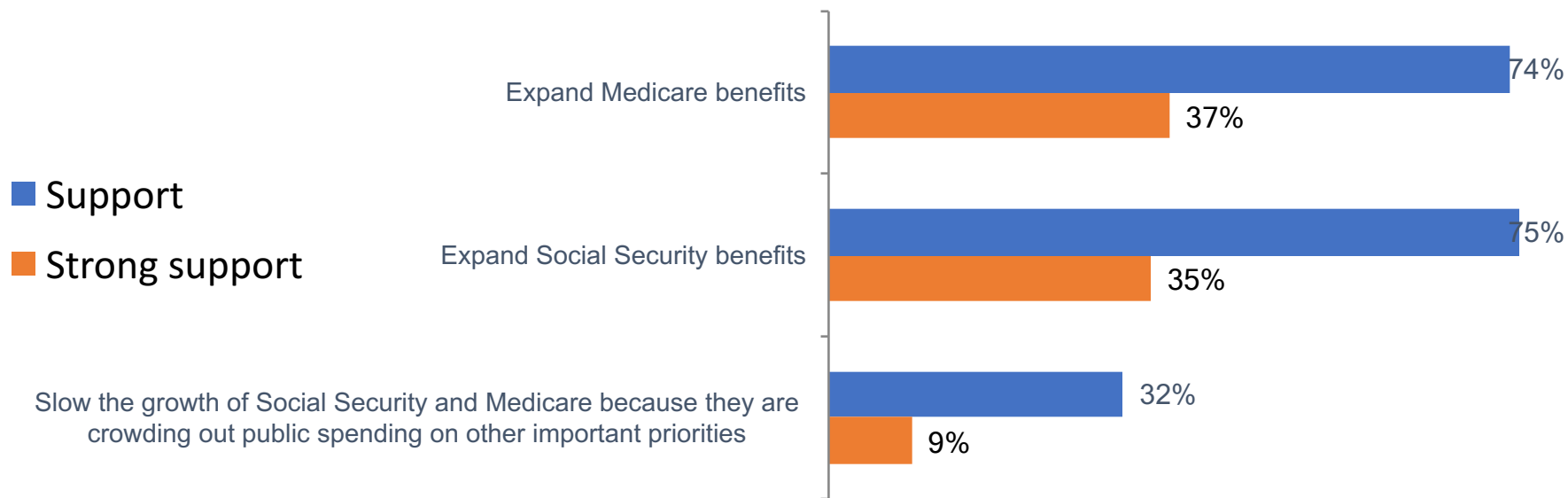
America's fiscal health is the top concern of educated white men

Top three issues

	White men Less than College	White men College +	White women Less than college	White women College +
1.	Health care	Federal budget and government spending	Health care	Health care
2.	Social Security and Medicare	Health care	Social Security and Medicare	Environment
3.	Immigration Federal budget and government spending (tie)	Immigration	Immigration	Social Security and Medicare

Growing voter alarm over deficits yet voters also want to spend more on entitlements

85% of voters say they are worried about the size of the deficit but ...



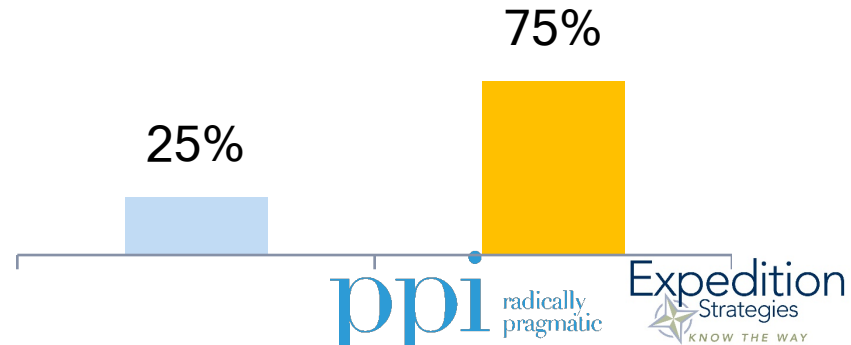
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Immigration: Voters want both action and a broader approach

On the issue of immigration, which approach do you prefer?

Focusing on **improving border security**

Focusing on a **comprehensive approach** that includes border security as well as resolving issues in the entire system...



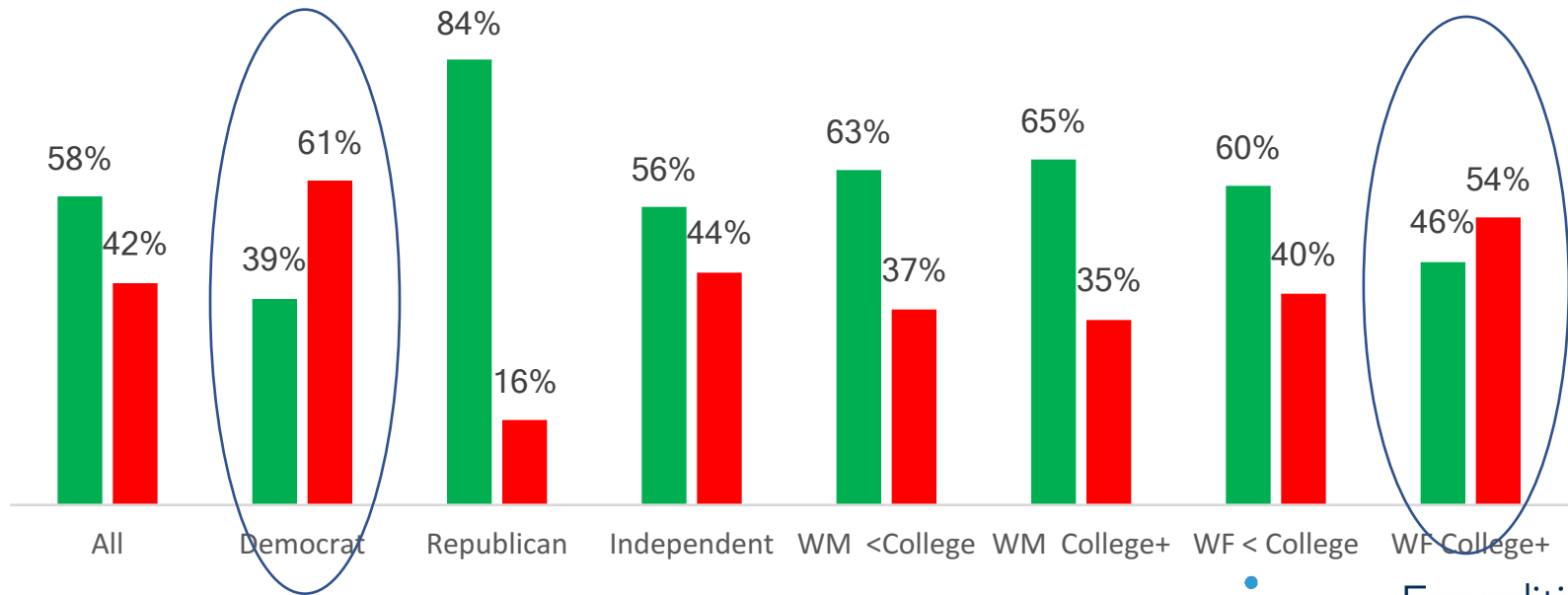
Voters are pragmatists on energy

- 58% say shale and natural gas “are a boon for our economy”
- Preferred goal of energy policy on oil and gas:
 - Eliminate use “as soon as possible” – 21%
 - Gradually reduce use – 37%
 - Promote both oil and gas and cleaner sources of energy: 42%

Democrats and white college-educated women are outliers in their views on shale

America's shale and natural gas resources are a boon for the economy...

America's shale and natural gas resources ought to be left "in the ground"...

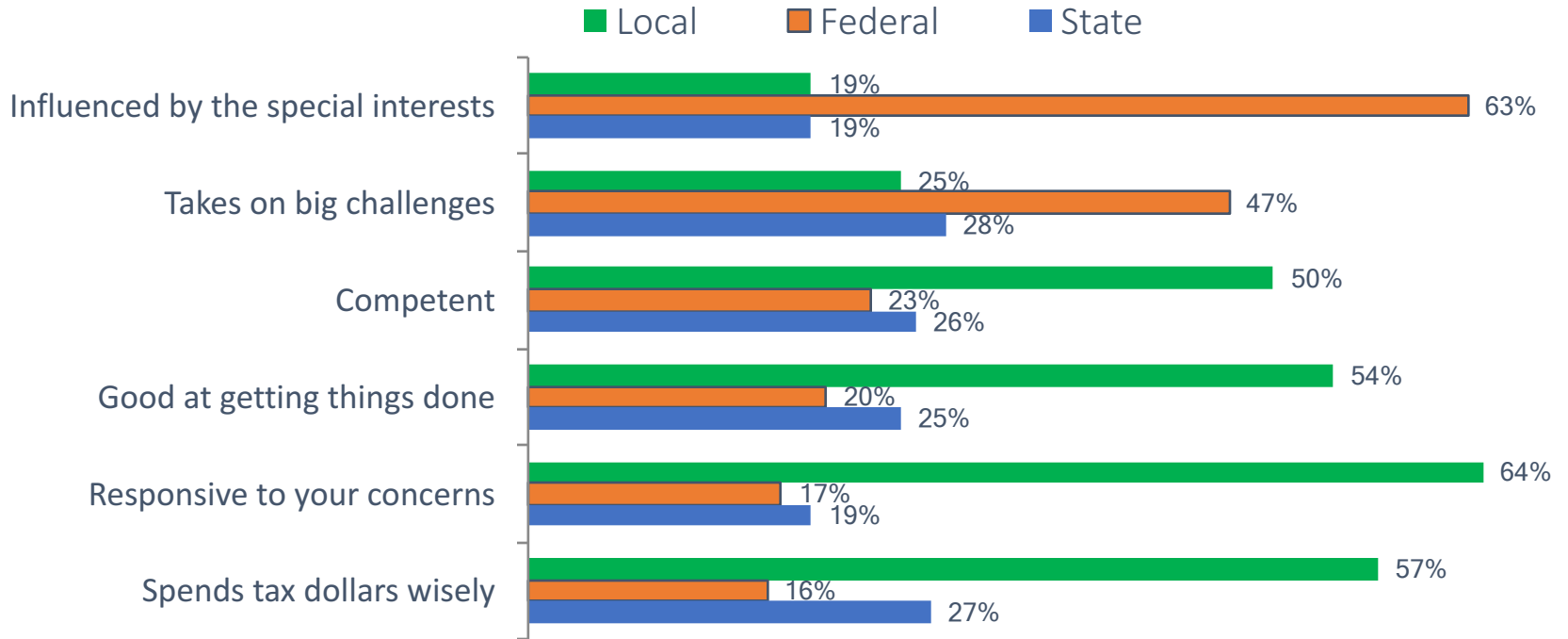


Q57. Thinking about America's role in the world, which is closer to your view?

Key Finding #6

Voters want local solutions over a bigger federal presence

Voters deeply distrust federal government



Q16. Please tell us if each of the following applies more to your local government, your state government, or to the Federal government.

Conclusion: Two ingredients for a durable majority

- A big tent
- A pragmatic, solutions-oriented agenda

Contacts

- Anne Kim, akim@ppionline.org
- Will Marshall, wmarshall@ppionline.org
- Pete Brodnitz, pete@expeditionstrategies.com