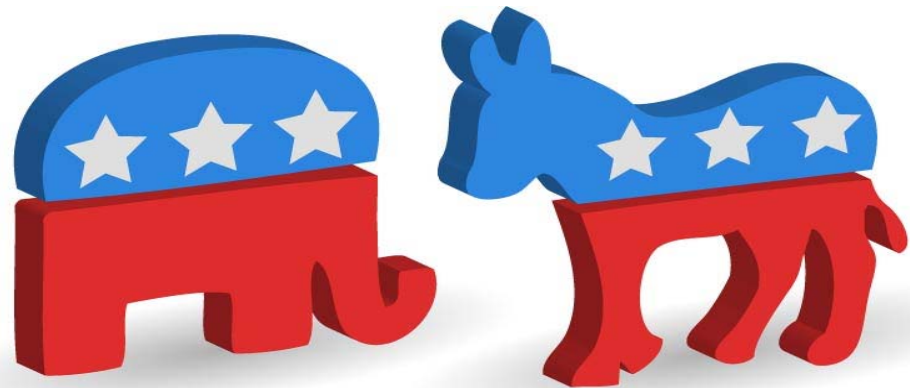




2012 U.S. ELECTIONS

Sara Taylor Fagen
October 10, 2011



State of the U.S. Political Environment

Is the President going to be Re-Elected?

Who's going to win the GOP nomination?

What does the Future Hold for American Politics?

Change Elections in a Row

US Senate

	112 th Congress	111 th Congress	110 th Congress	109 th Congress
Democrats	51	57	49	44
Republicans	47	41	49	55
Independents	2	2	2	1

U.S. House

	112 th Congress	111 th Congress	110 th Congress	109 th Congress
Democrats	192	255	235	202
Republicans	242	178	199	232
Independents/Vacancies*	1 (Vacancy)	2 (Vacancies)	1 (Vacancy)	1

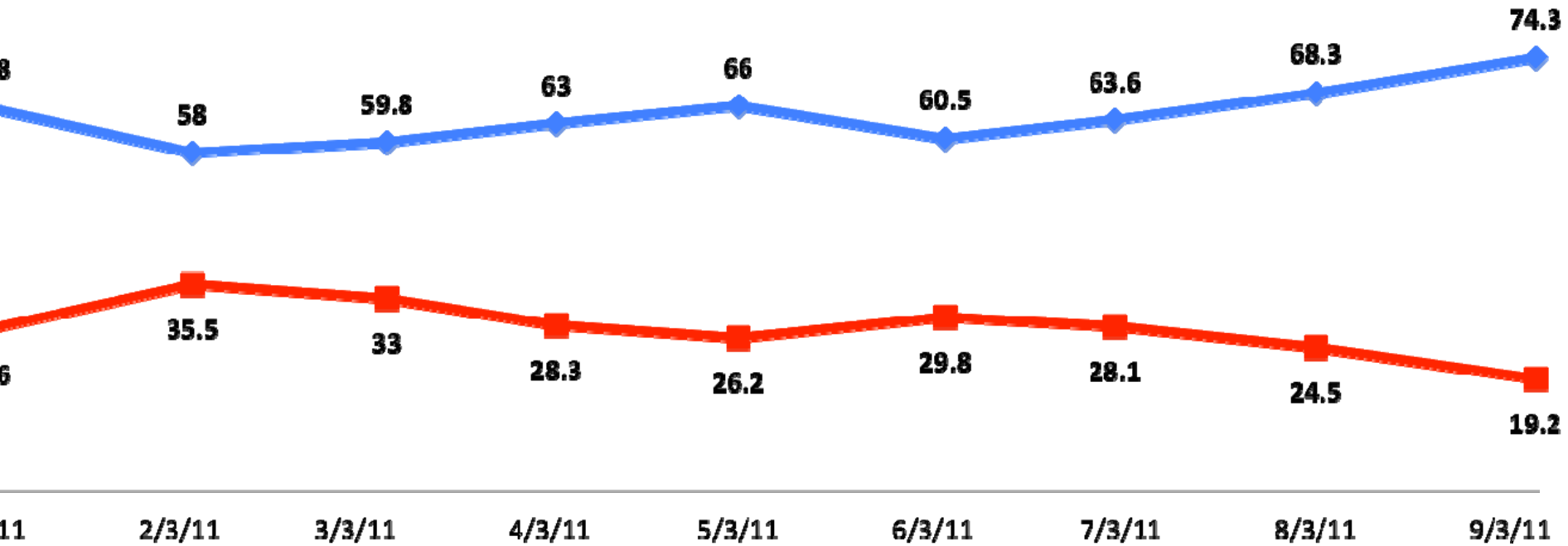
* Vacancy: Wu (D) OR-1

* Senate Independents Caucus with Dems

3 in 4 Americans Believe U.S. is on the Wrong Track

RCP Average

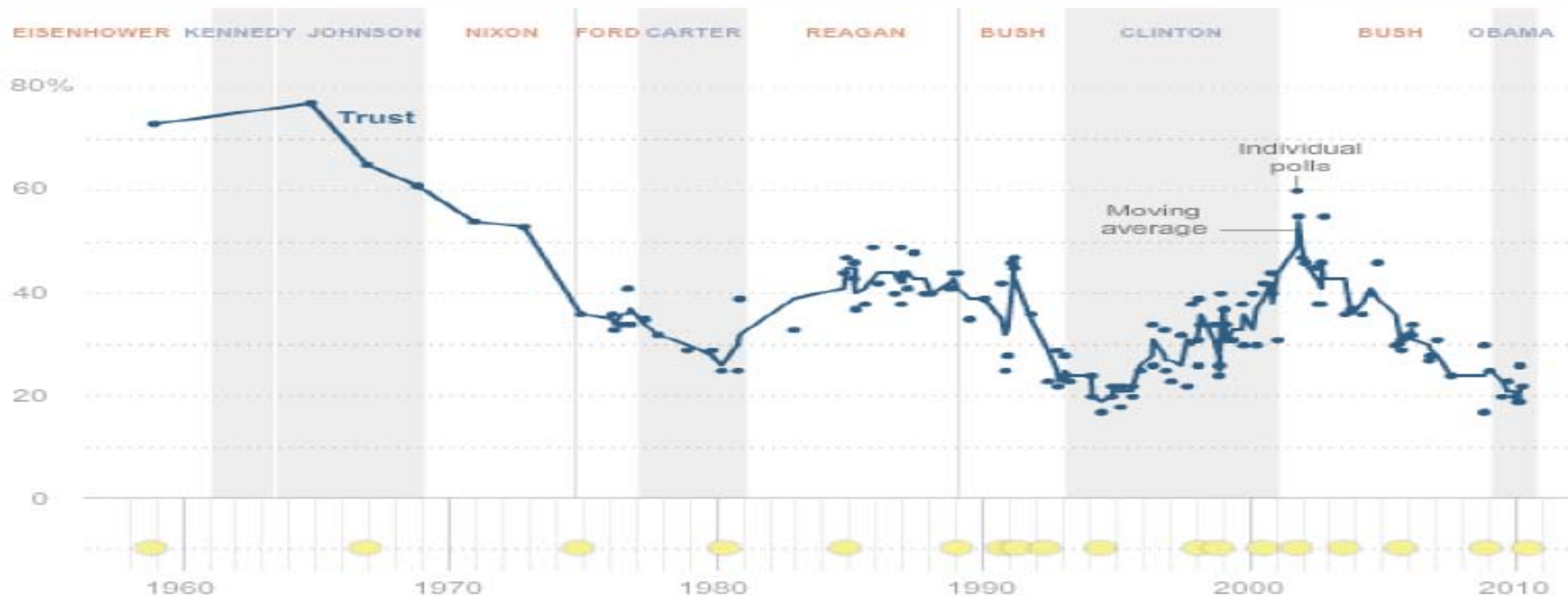
Wrong Track Right Track



Public Trust in Government

Public Trust in Government at Historic Lows 1958-2010

*How much of the time do you trust the government in Washington?
Just about always /Most of the time*



<http://people-press.org/trust>; Data from Pew Research Center, National Election Studies, Gallup, ABC/Washington Post, CBS/New York Times, and CNN Polls. From 1976-2010 the trend line represents a three-survey moving average. For party analysis, selected datasets obtained from searches of the iPOLL Databank provided by the Roper Center for Public Opinion Research, University of Connecticut.

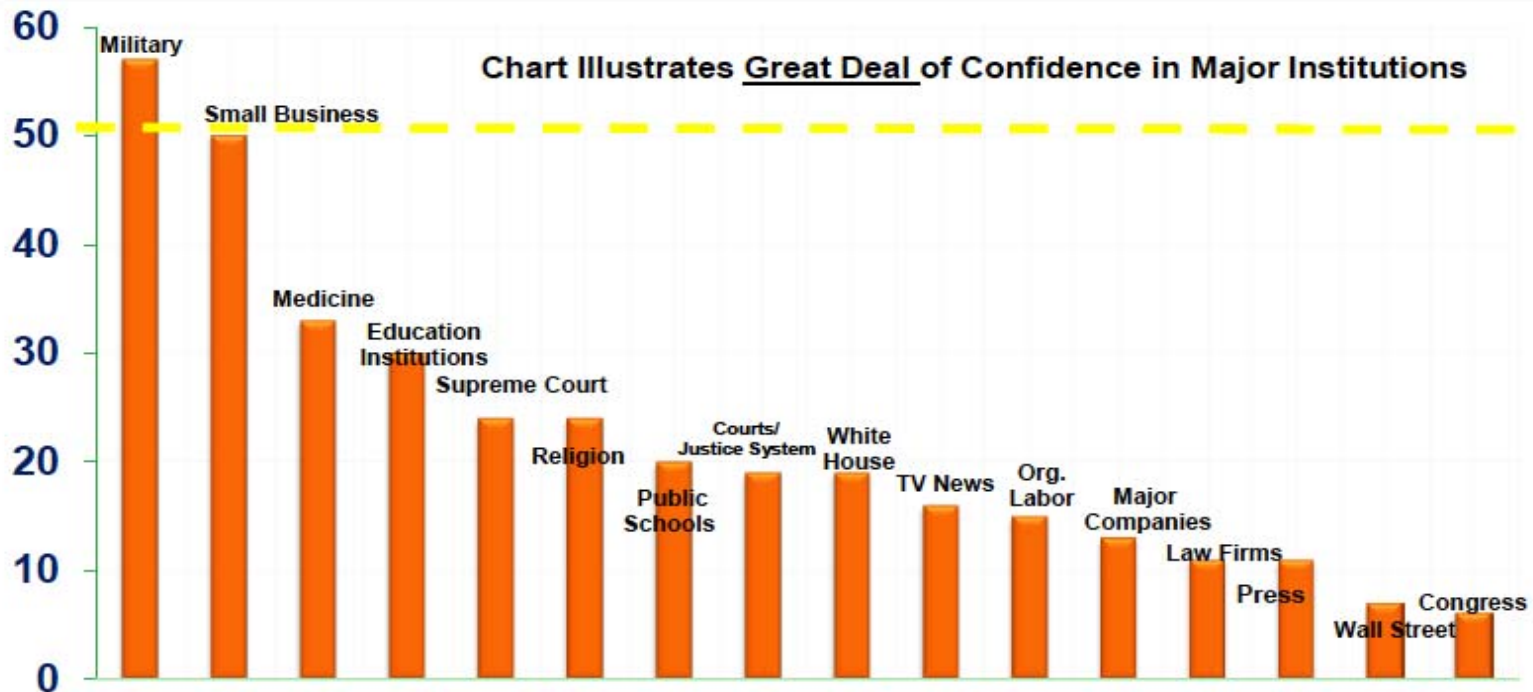
Doug Soskice, 9/29/20

Confidence in Institutions

2011 Annual Harris Poll Demonstrates Public's Lack of Faith in Almost All Institutions

May 18, 2011

As far as people in charge of running ___ are concerned, would you say you have a great deal of confidence, only some, or hardly any confidence at all in them?

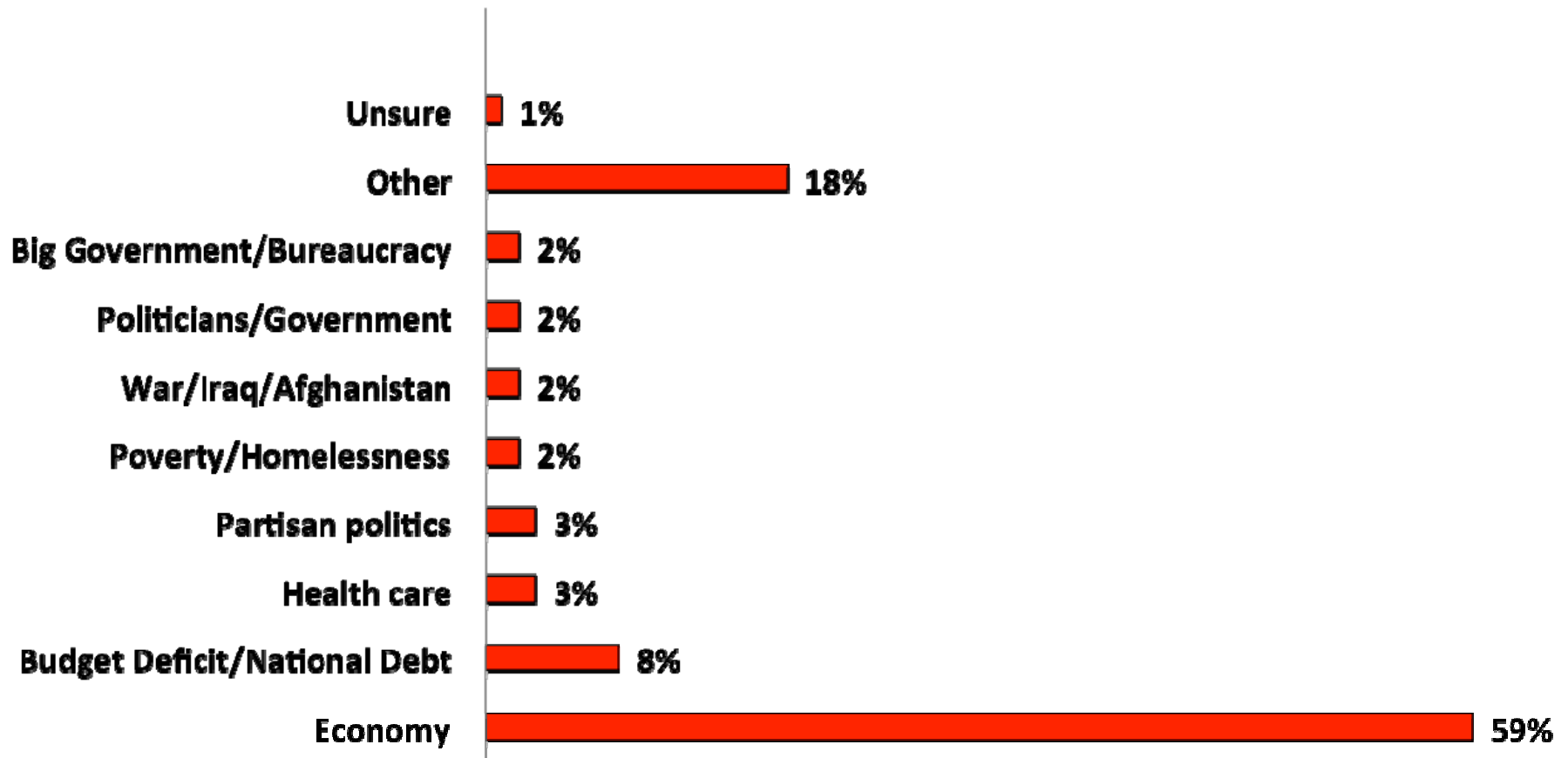


5 Key Factors Influencing the 2012 Presidential Election:

1. U.S. Economy
2. President Obama / Democratic Base
3. The GOP Nominee
4. Money
5. Geo Political Environment



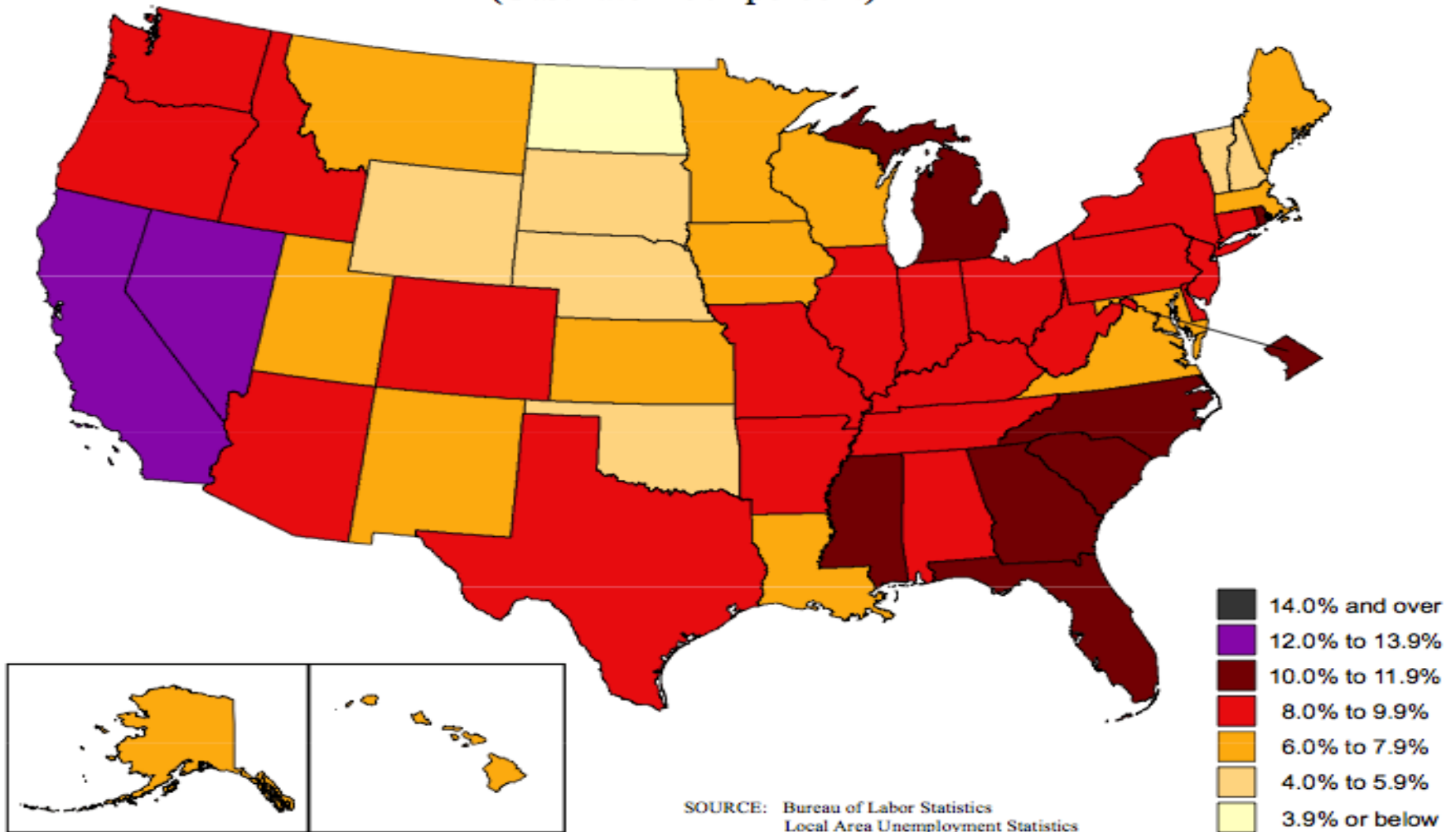
Economy By Far the Most Important Issue



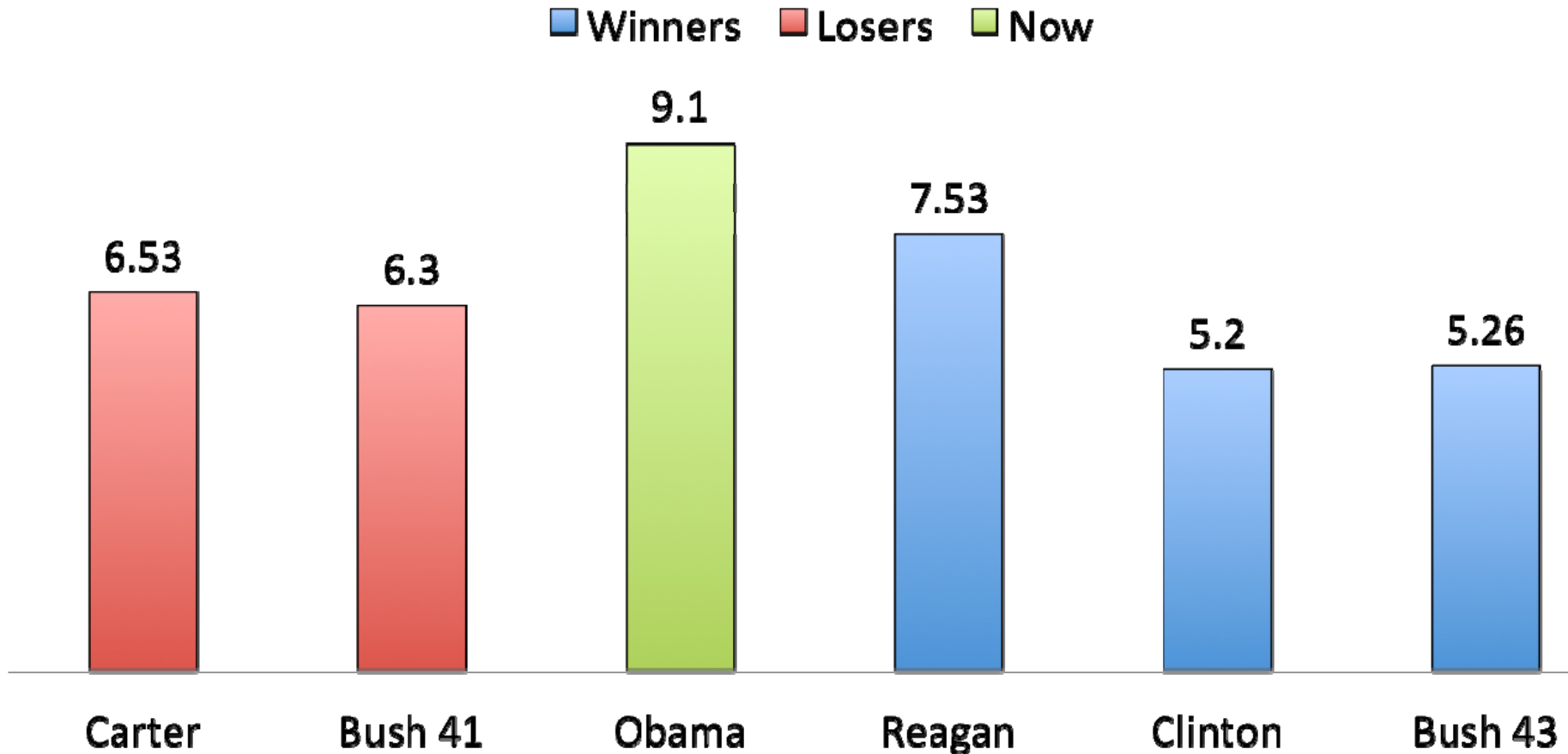
Unemployment

As of September 2011, Unemployment is at 9.1 %

(U.S. rate = 9.1 percent)

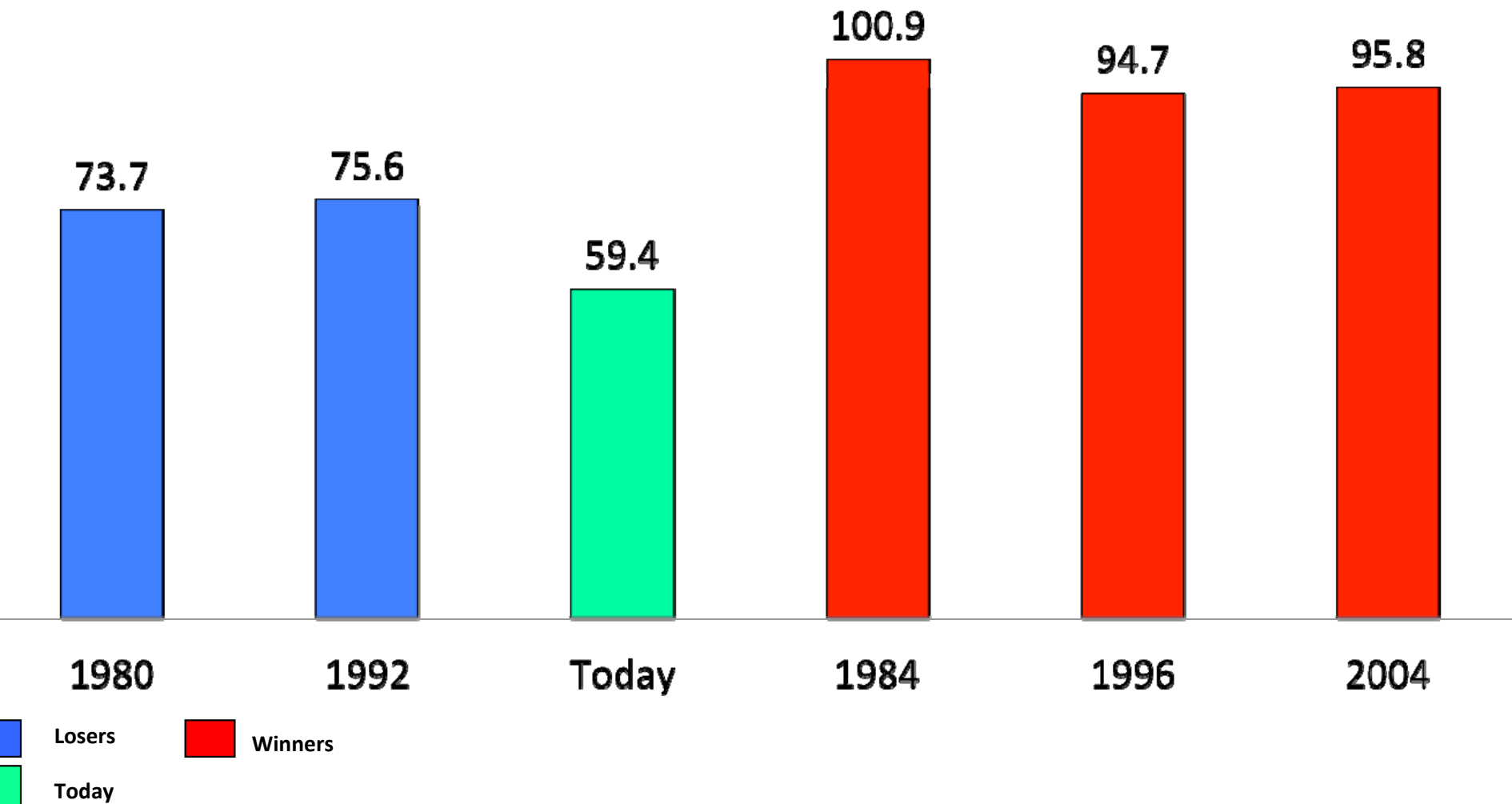


Average Unemployment Among Winning and Losing Incumbent Presidents

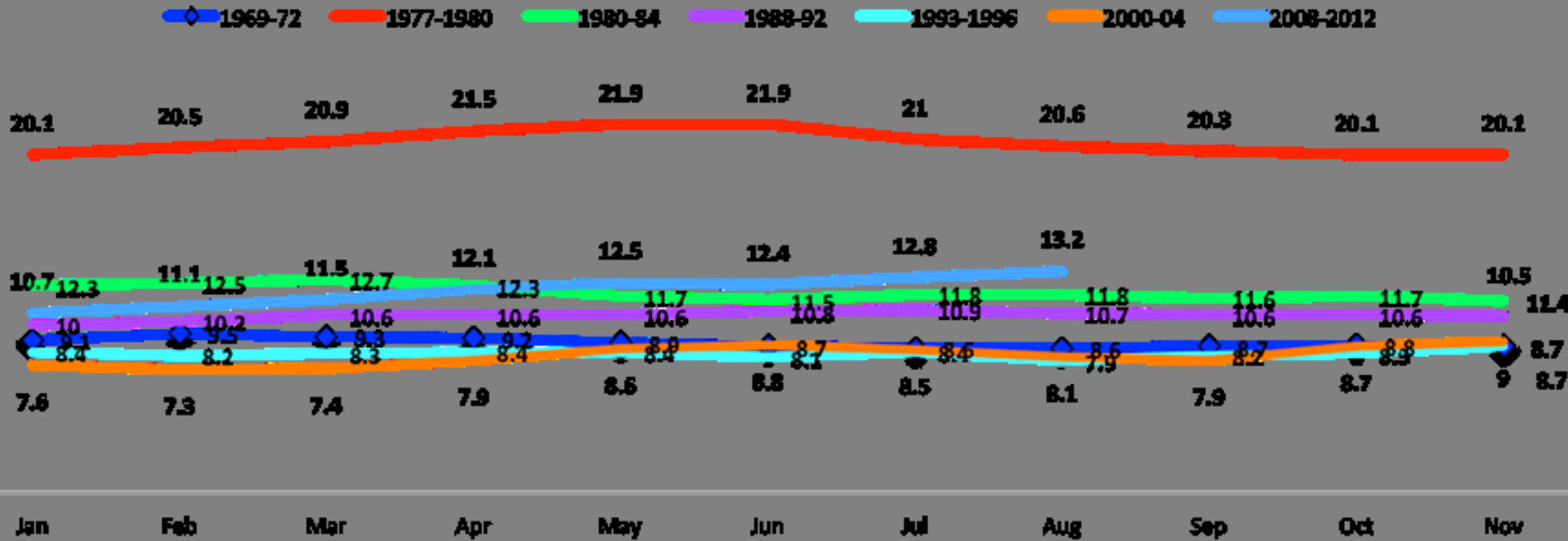


Univ. Of Michigan Consumer Sentiment Index

Incumbents-September of Election Year

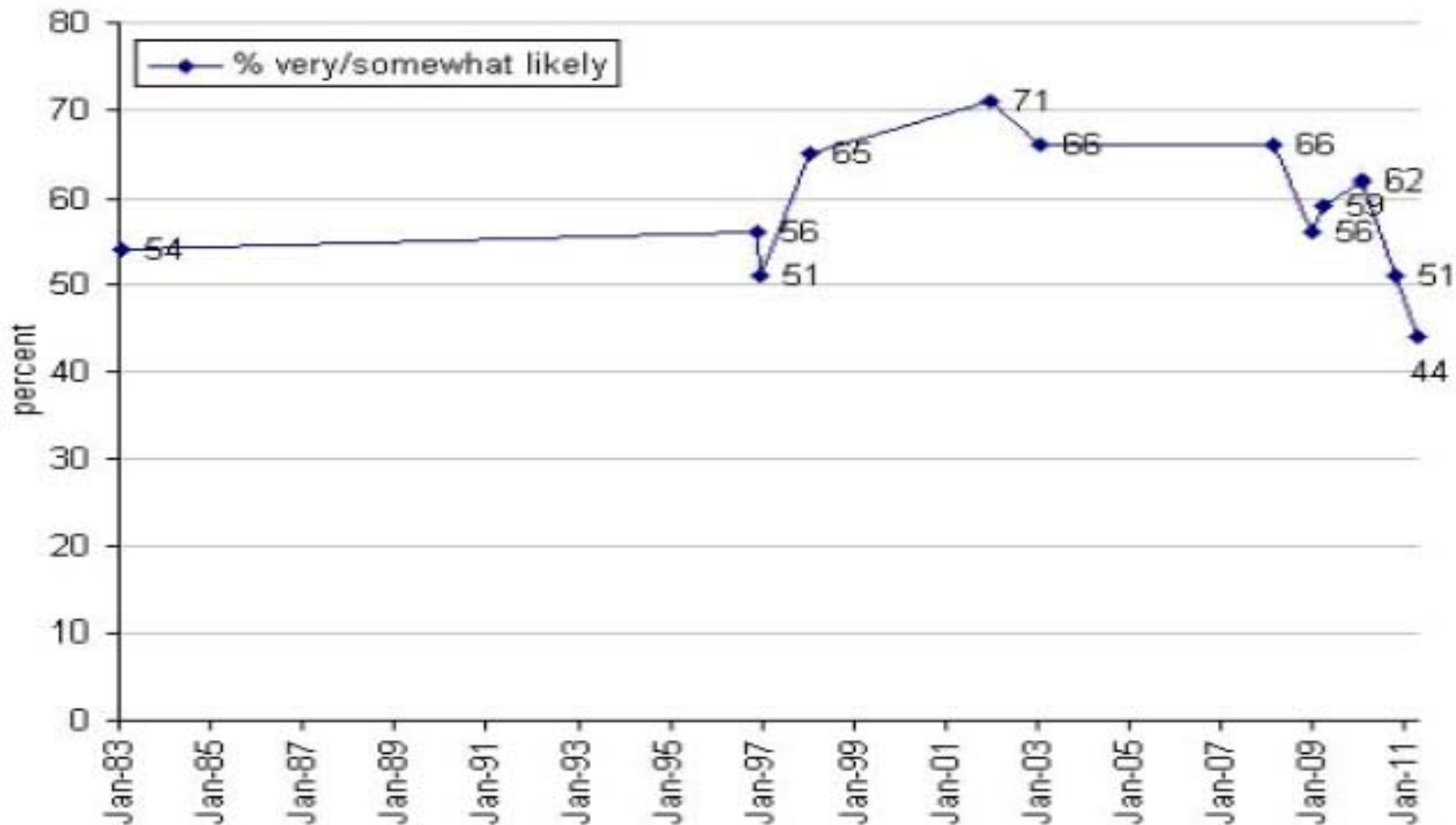


Misery Index During an Election Year



Optimism about the Prospects for the Next Generation's Future Is Down 18 Points Since December 2010

"How likely do you think it is that today's youth will have a better life than their parents -- very likely, somewhat likely, somewhat unlikely, or very unlikely?"

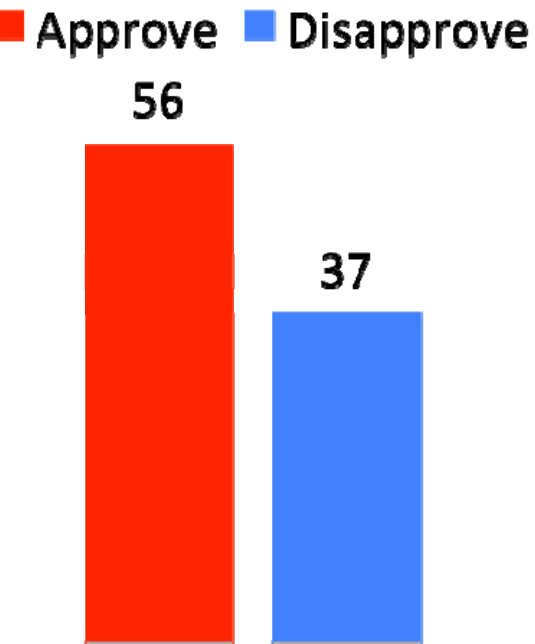


Sources: Gallup, CBS News, New York Times and Roper Organization

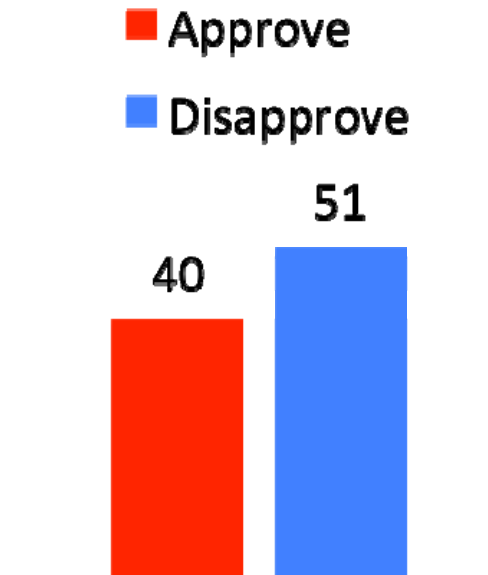
Source: Compilation of Data from Gallup, CBS News/New York Times polls and Roper

President's Approval Rating Less than 50%

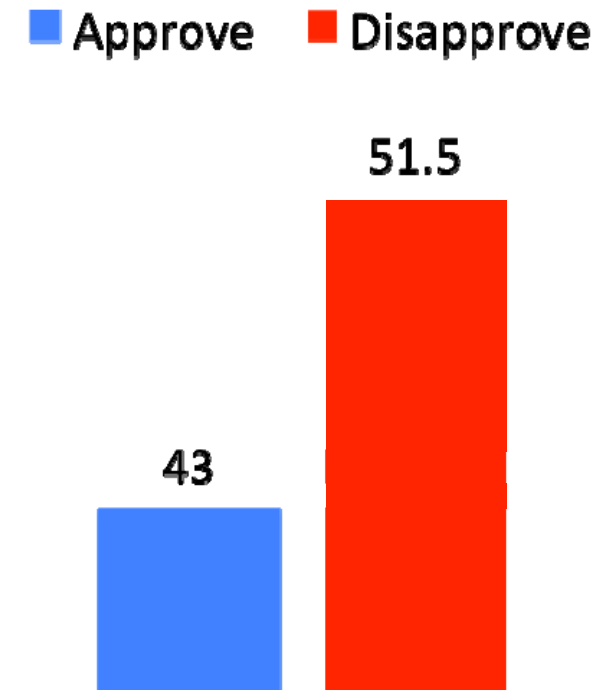
**Average Approval
Among Incumbent
Winners**



**Average Approval
Among Incumbent
Losers**



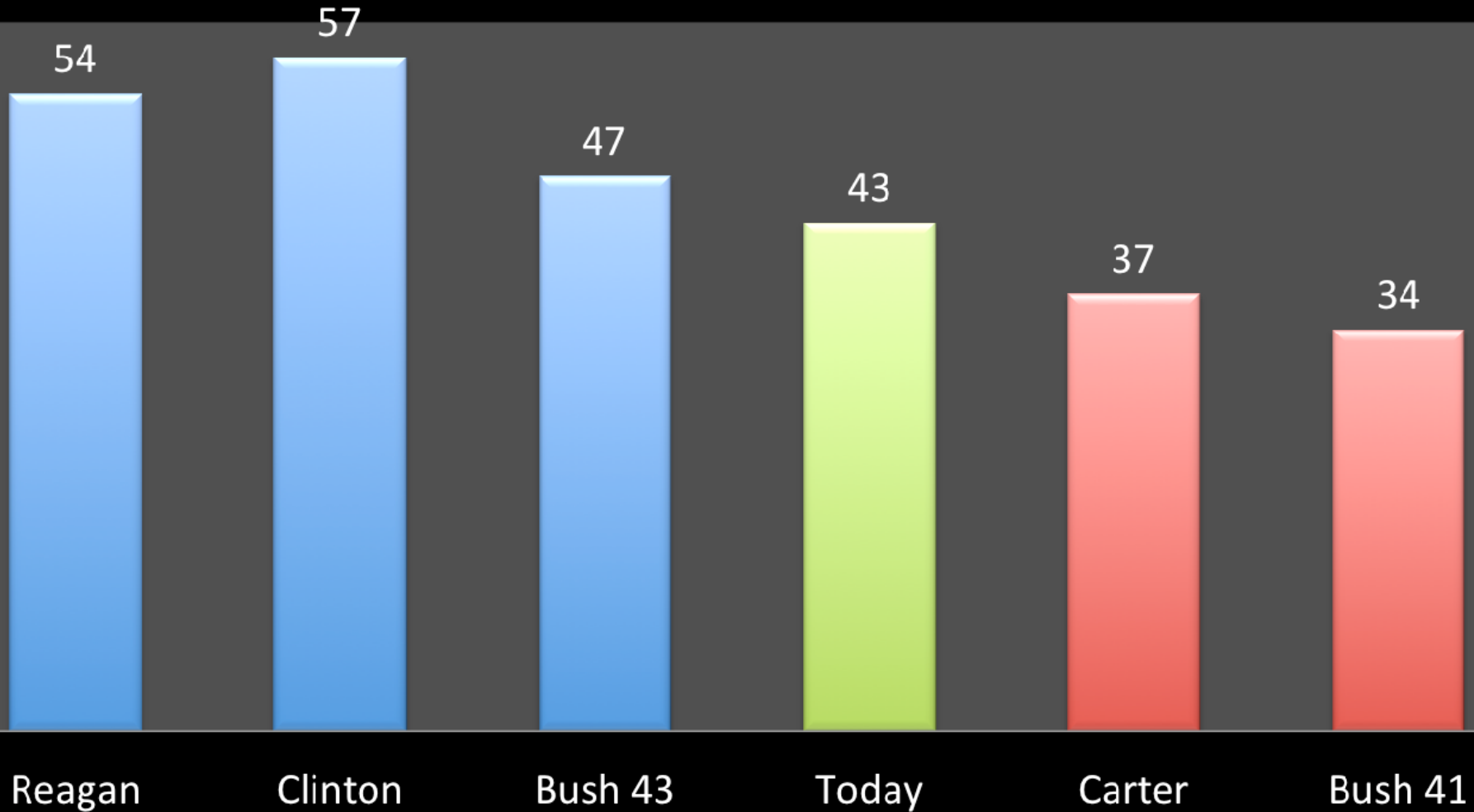
Today*



* Gallup average as of Sept 29- Oct 1, 2011

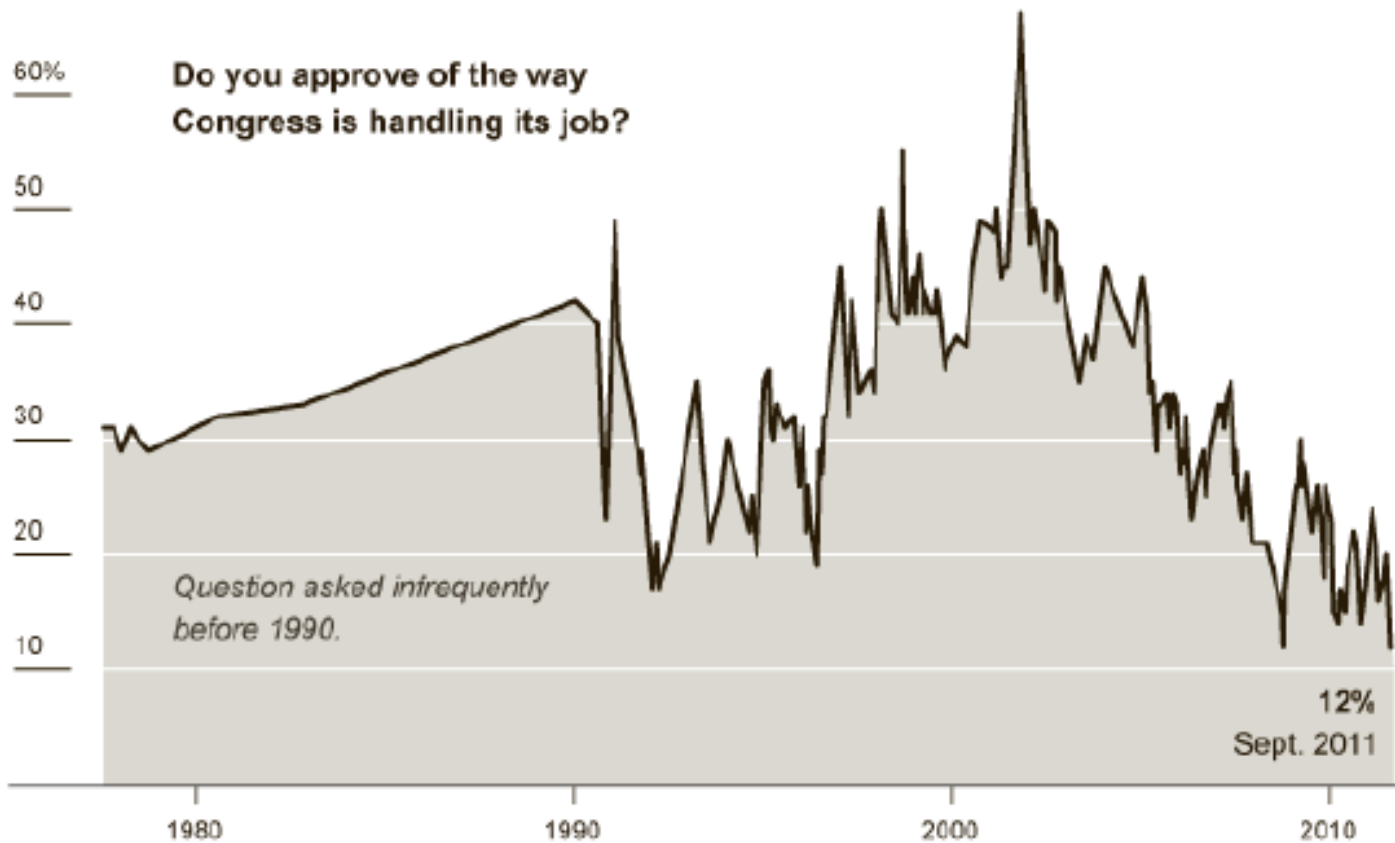
Approval Rating Among Incumbents in October of an Election Year

■ Winners ■ Losers ■ 2012 Cycle



12% Congressional Approval Rating at Record Low

(September 16, 2011)

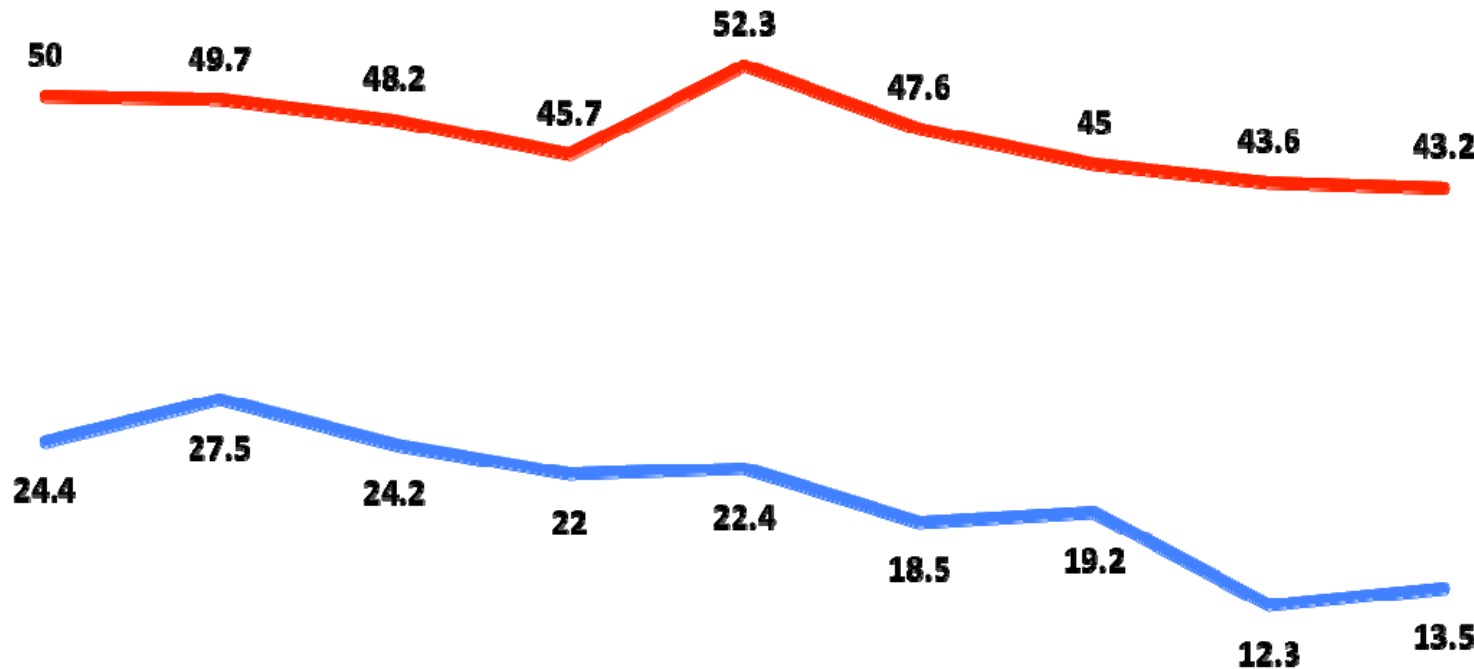


Source: New York Times/CBS Poll, September 16, 2011

Approval Rating Less than 50%

RCP Average

— Congress — President

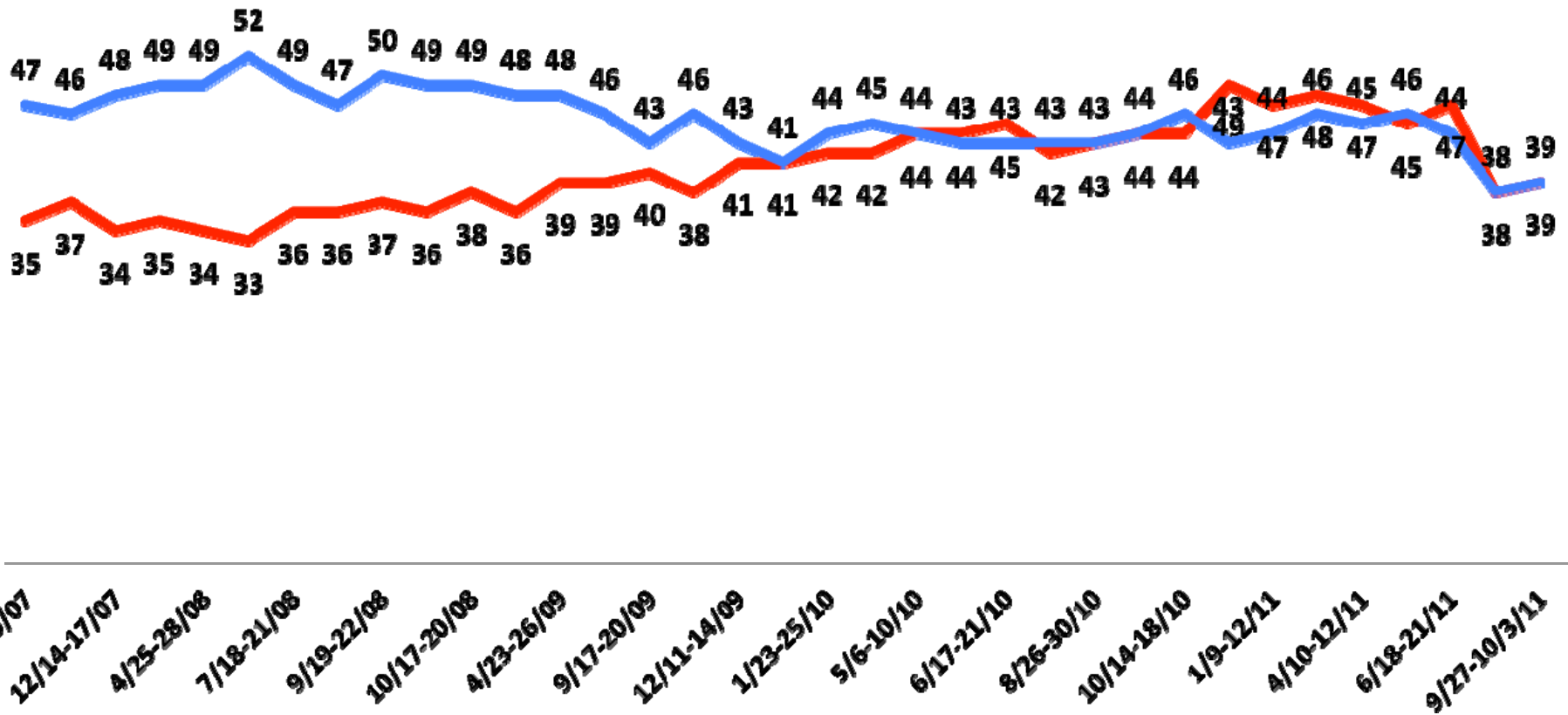


1/1/11 2/1/11 3/1/11 4/1/11 5/1/11 6/1/11 7/1/11 8/1/11 9/1/11

Generics Barriers

Republicans vs. Democrats

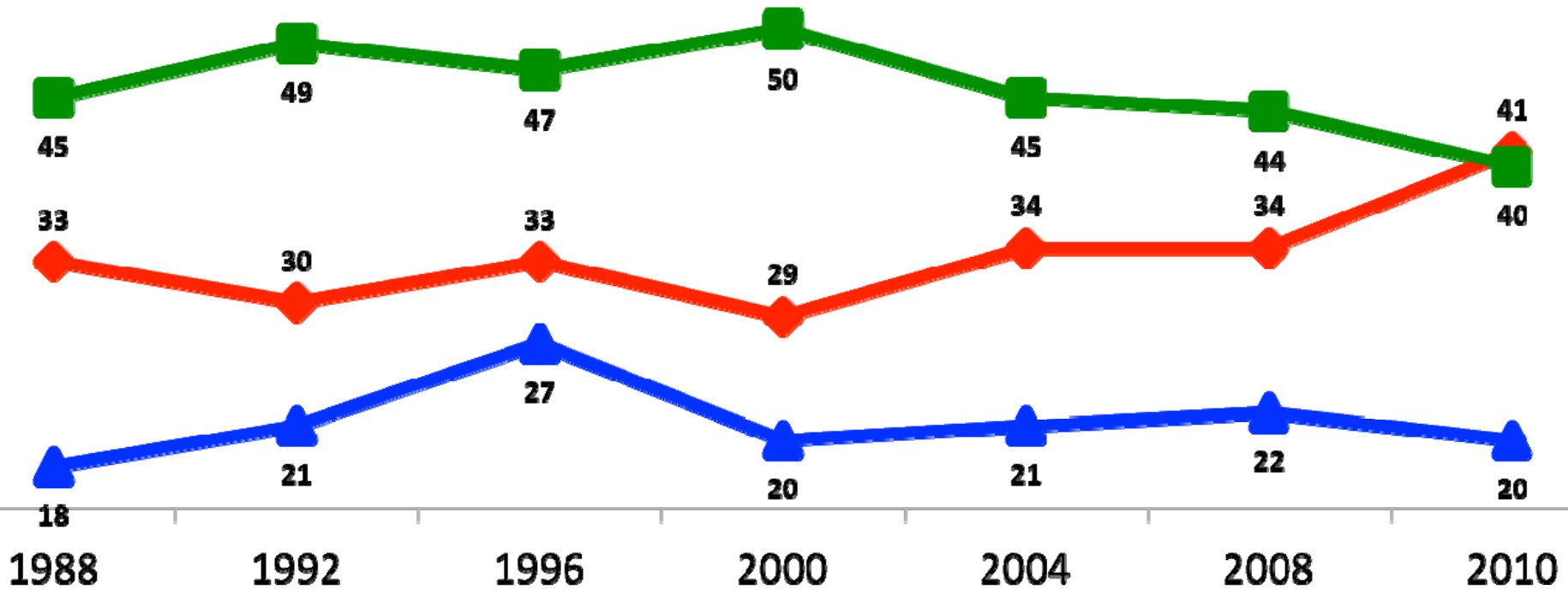
— Republicans — Democrats



America Remains a Center Right Country

Recent polling data shows conservatives were a greater percentage of the electorate than any time since at least 1976.

Conservative Moderate Liberal

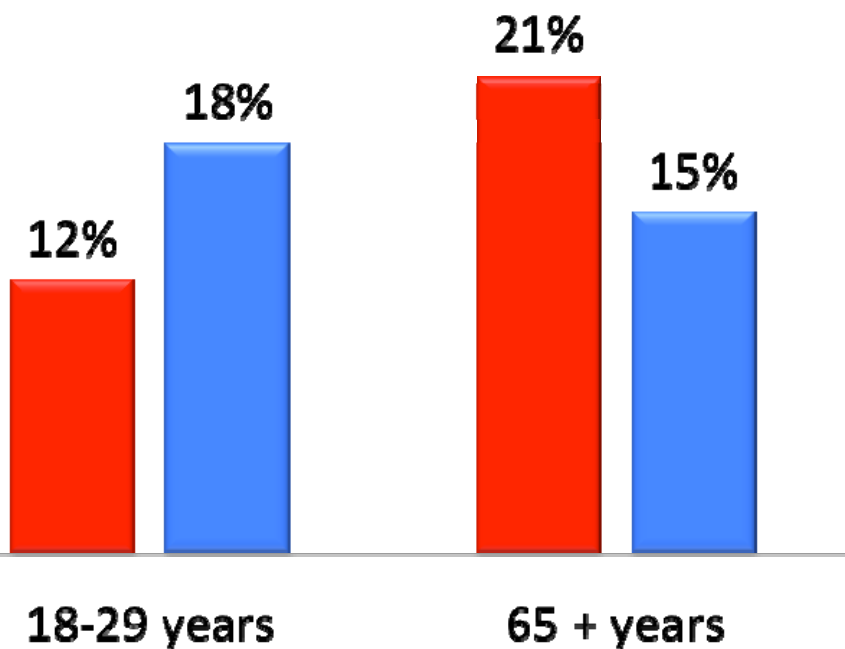


Can the President Turn Out His Base?

Exit polling shows that during the 2010 Midterm elections, turnout was down among the Democrats' core voter groups- young people ages 18-29, African Americans, & Latinos

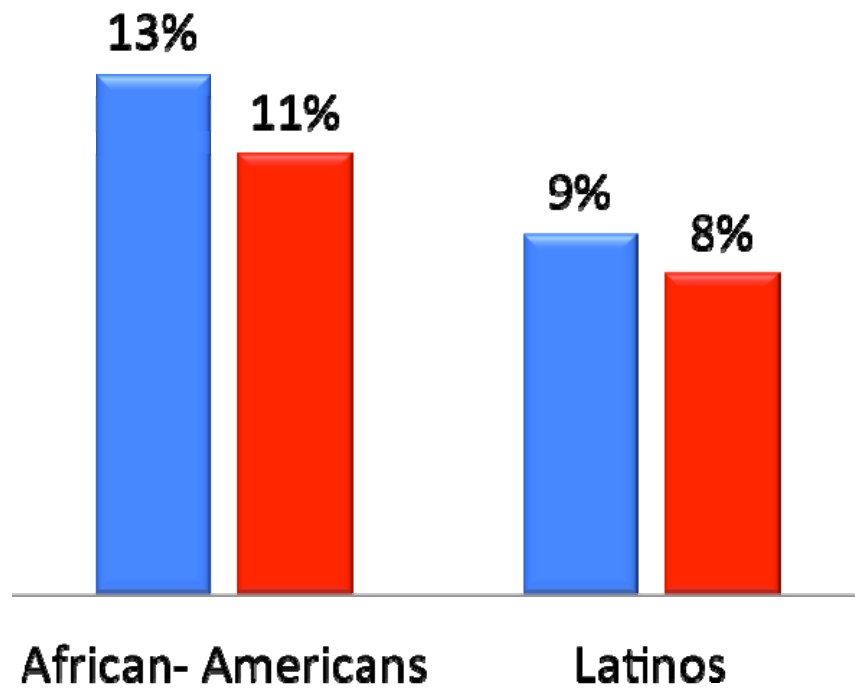
Age

■ 2010 ■ 2008

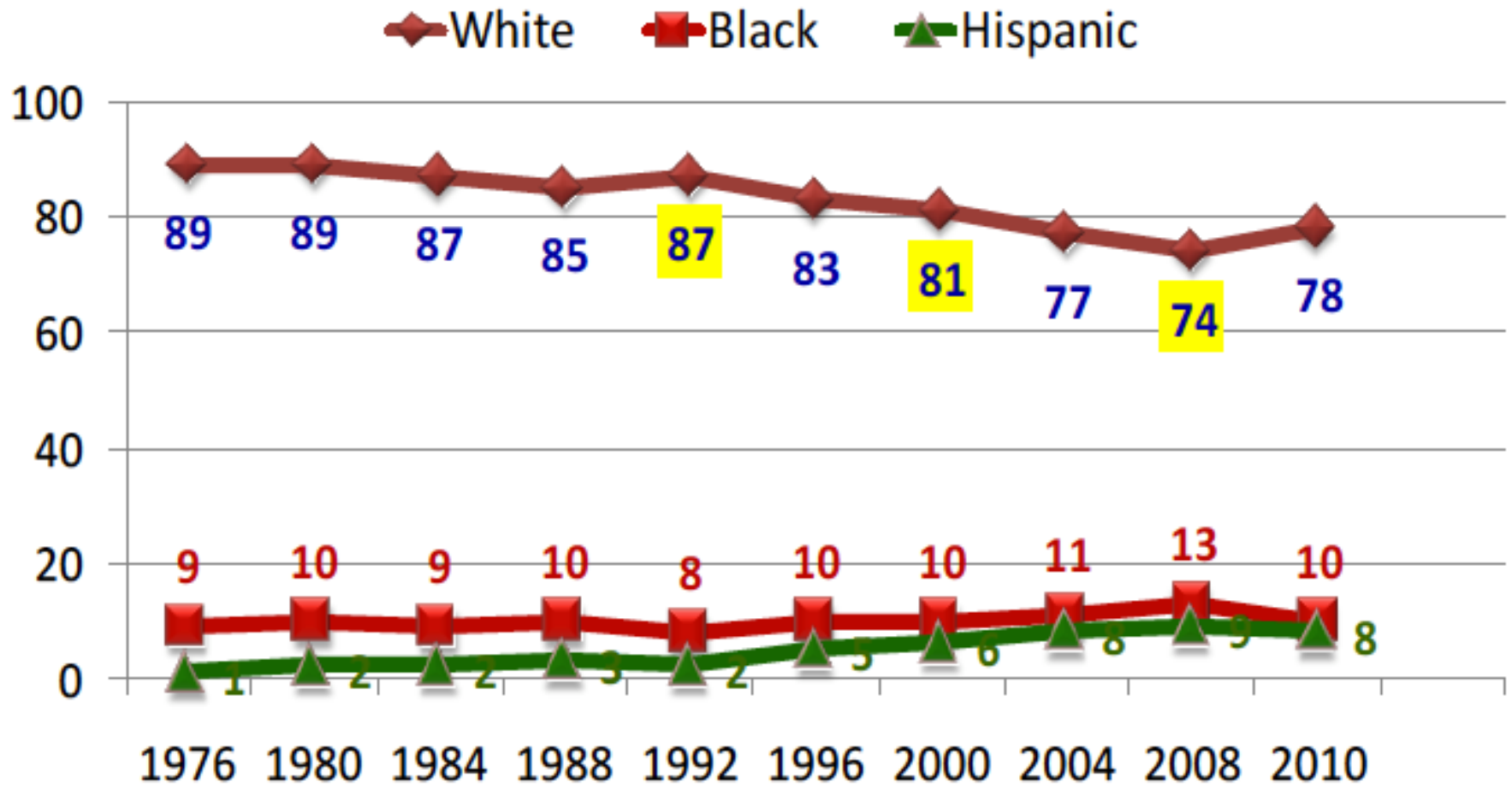


Ethnicity

■ 2008 ■ 2010



There Has Been a Drop in the White Vote Share of Total Voters in Presidential Elections Since 1992



Source: http://www.ropercenter.uconn.edu/elections/how_groups_voted/voted_76.html (for 1976 data);
elections.nytimes.com/2008/results/president/exit-polls.html (for 1980-2008 data)

The GOP Candidate

Narrowed Field- 8 Candidates



	July	September	Now*
Mitt Romney	30	25	25 →
Herman Cain	7	4	16 ↑
Rick Perry	8	29	16 ↓
Ron Paul	11	10	11 →
Newt Gingrich	6	6	7 →
Michelle Bachmann	16	8	7 ↓
Rick Santorum	3	3	2 →
Jon Huntsman	3	1	1 →
Other/No Opinion	16	13	15

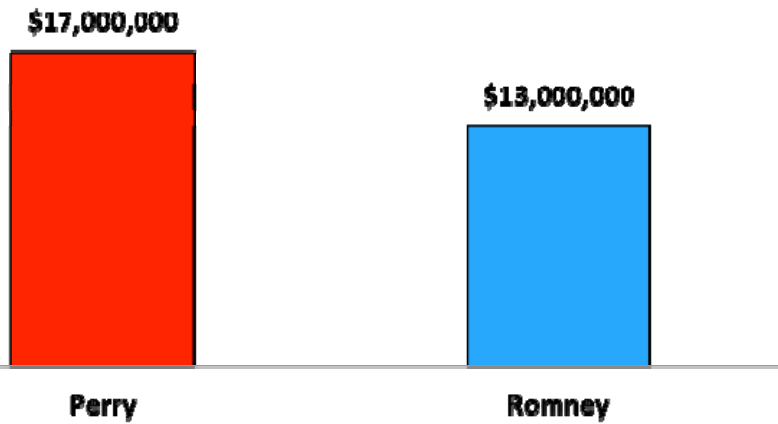
* October 2, 2011

Source: ABC News/Washington Post Poll September 29-October 2, 2011

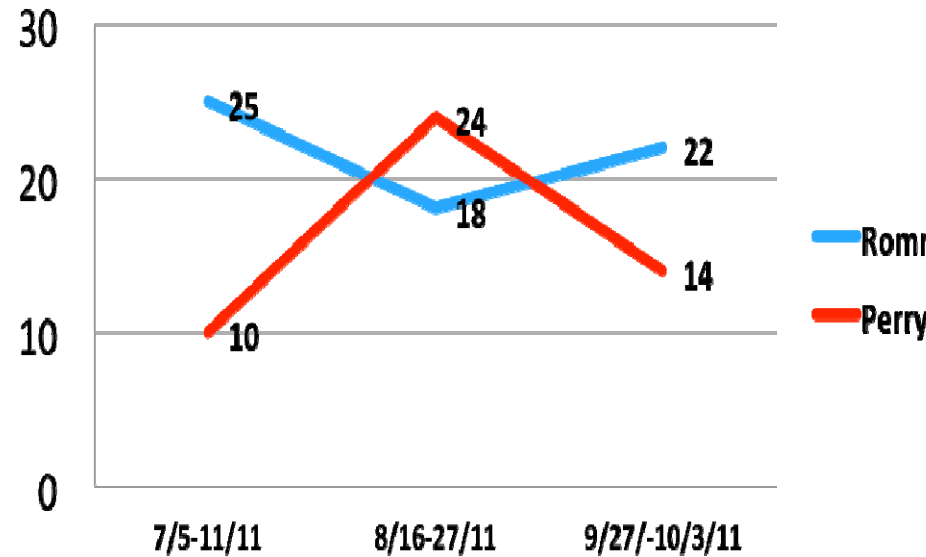


Will it Come Down to Romney vs. Perry?

Estimated Q3 Fundraising Numbers



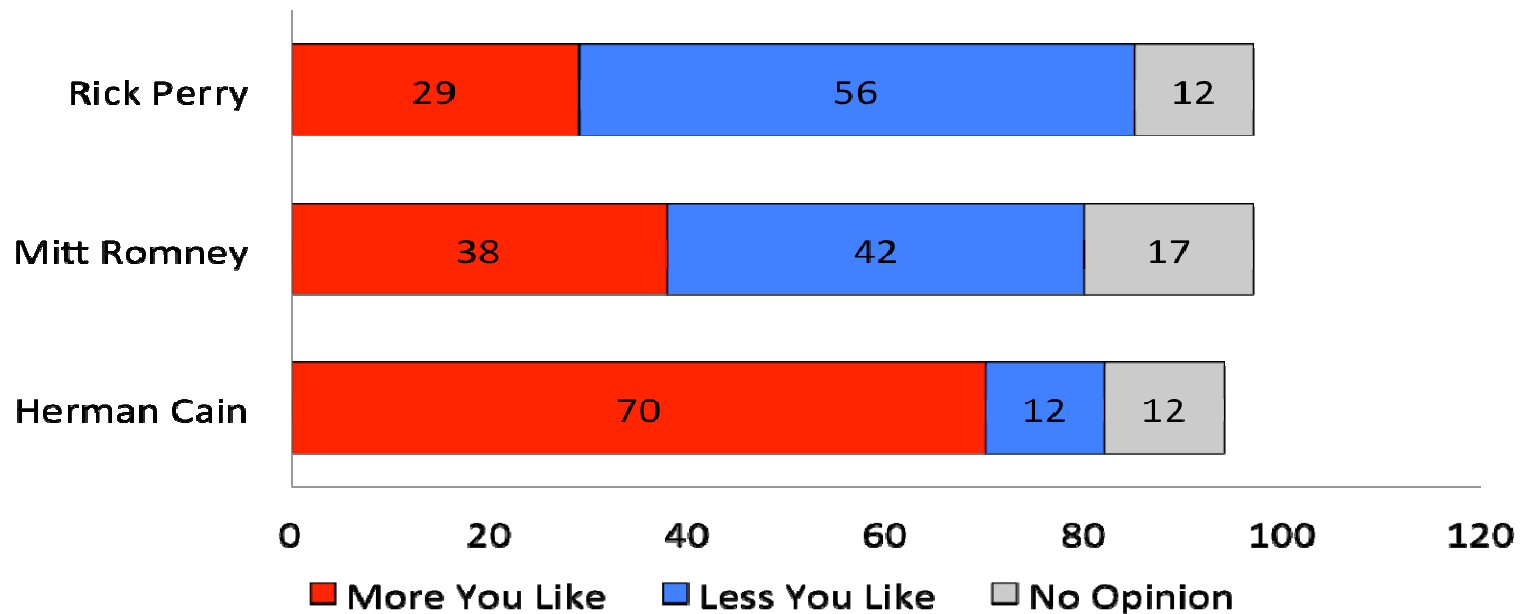
Recent Polling Data



But What About Herman Cain?

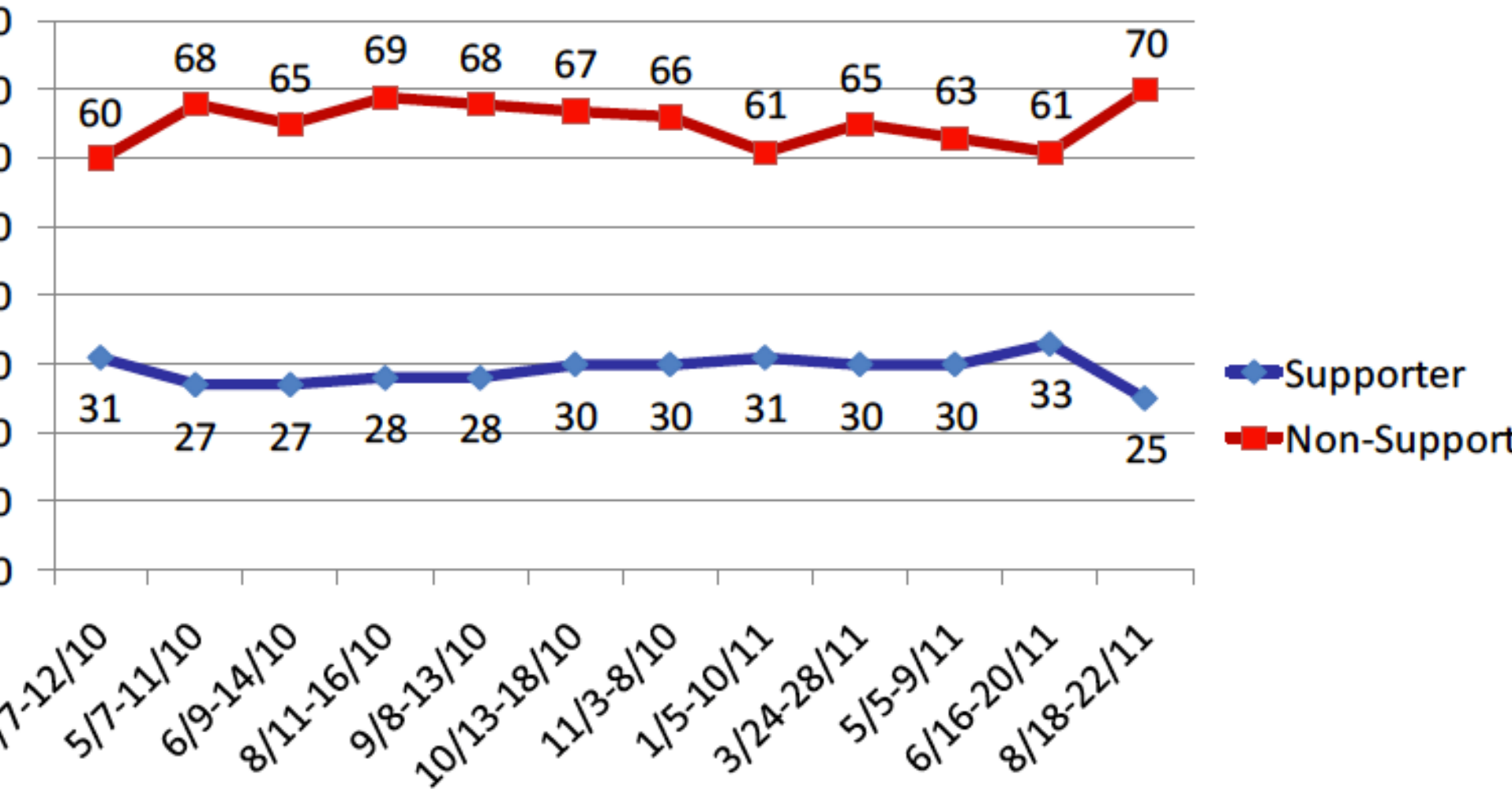
70% of those who saw the debates say the more they learn about Herman Cain, the more they like him. Among tea party supporters, Cain's support has surged from 5% to 30% in a month.

Regardless of whom you might support, would you say that the more you hear about....

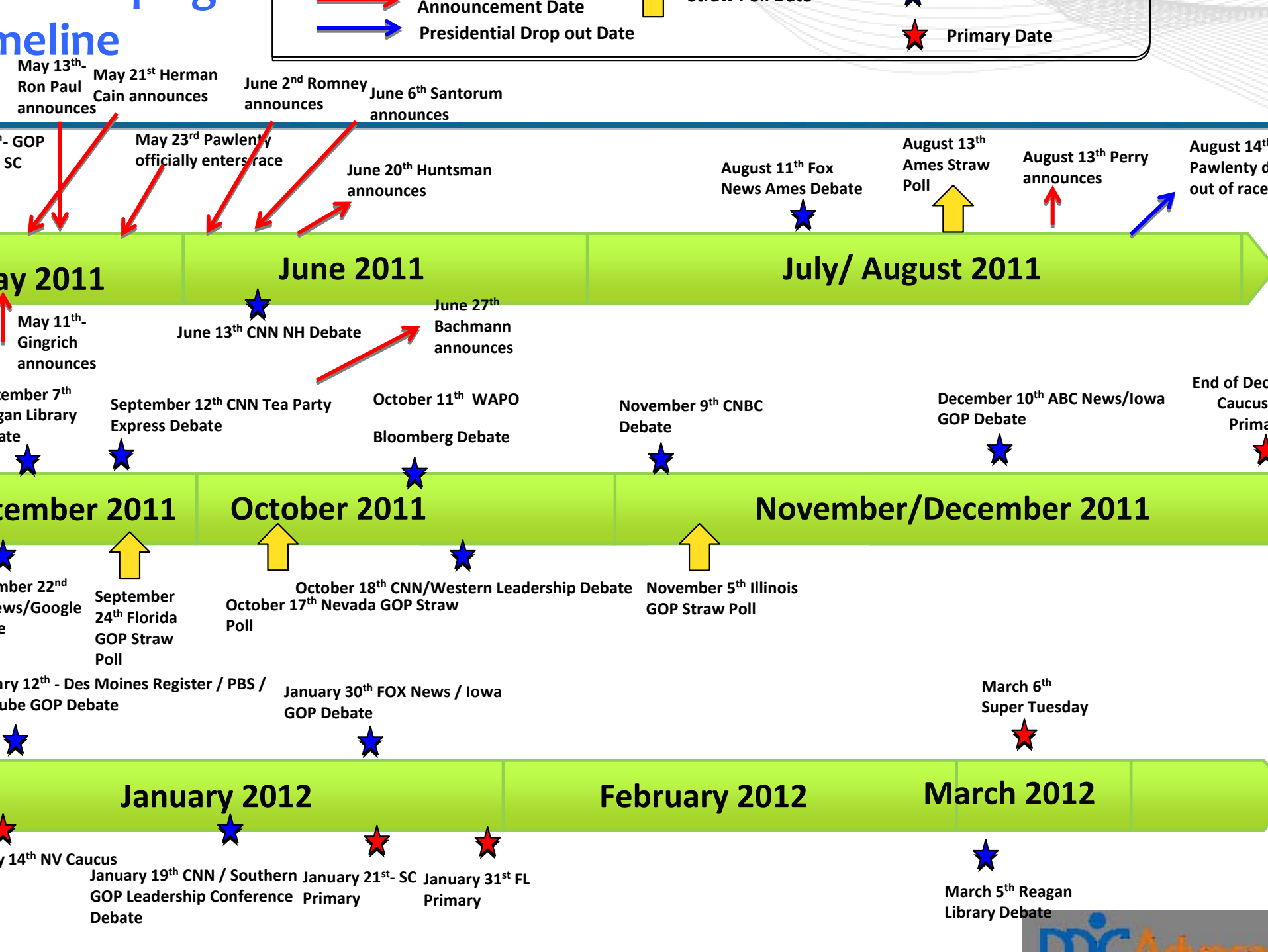


Support for Tea Party has Declined to 25%

(September 2011)

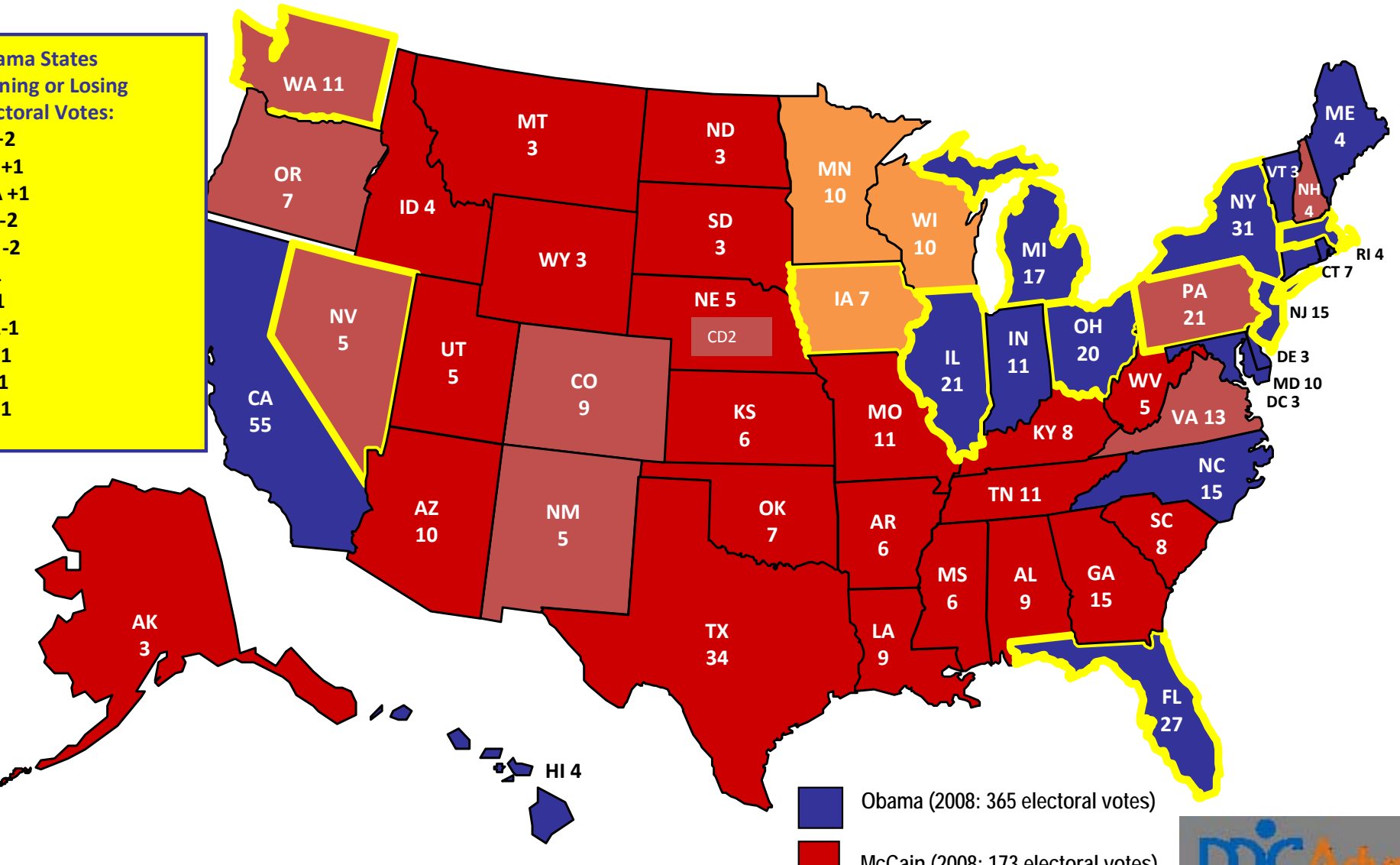


Source: USA Today/Gallup Poll

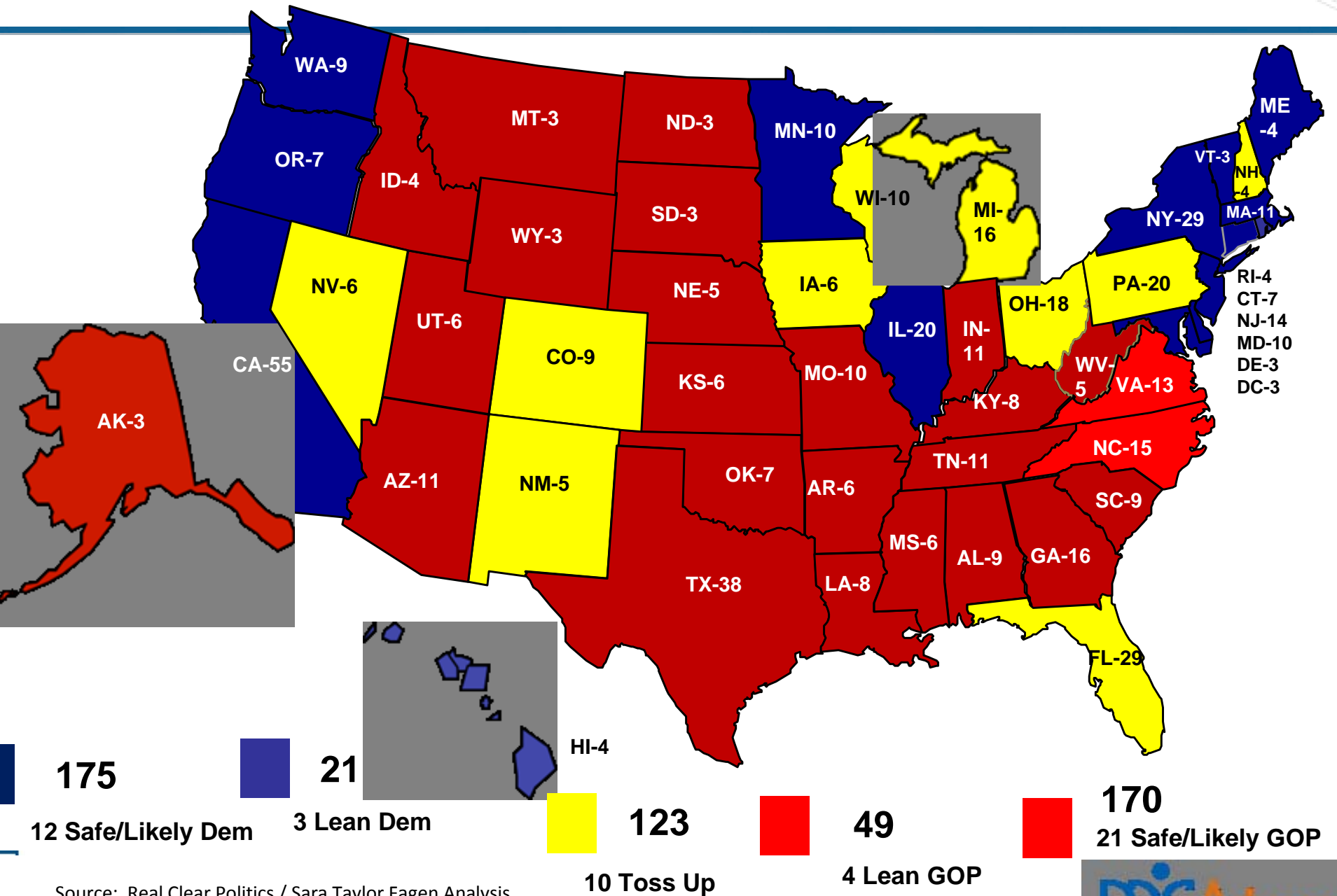


Obama Loses a Net of 6 Electoral Votes

2008, Obama won with 365 electoral votes. After redistricting, these states will only represent 359 electoral votes.



2012 Battleground States



Conclusion

Historically, very consequential period for the U.S.

Facing unprecedented fourth change election in a row; politics remains tumultuous.

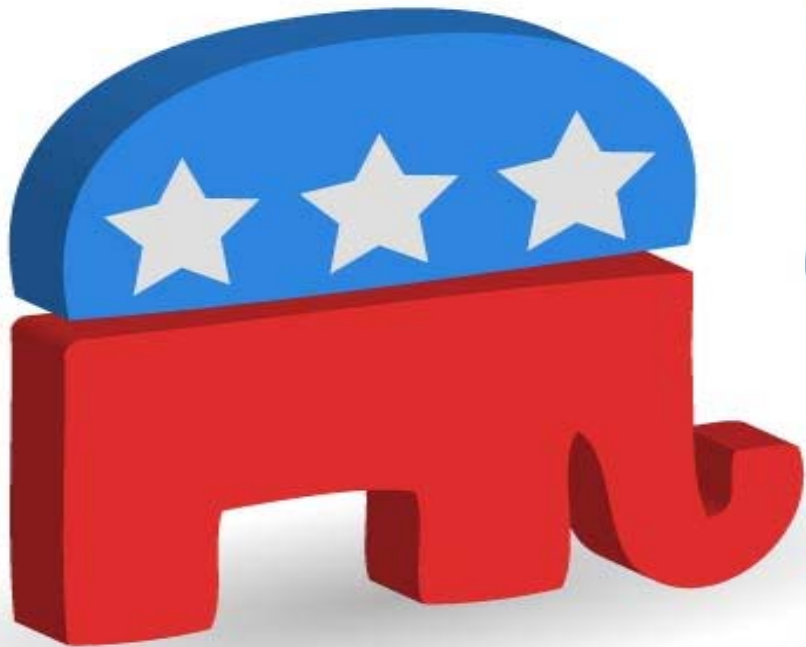
Obama's in trouble today, but election still 13 months away.

Watch for more twists and turns in the GOP race.

Major Gov't reform coming - means there will be big winners and big losers

Only guarantee in politics is the unexpected.





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