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Thursday, July 10, 2014

FLASH POLLING MEMO

FROM: Brent Buchanan, Managing Partner

TO: Interested Parties

RE: Analysis of Alabama Statewide Runoff Election & 2016 Presidential Flash Poll

Our firm conducted an independent flash poll of statewide races for the July 15, 2014 Republican primary runoff election. The survey was completed across two days – July 7 & 8 – and we screened respondents for likelihood of voting. The population universe for the state was selected based on an estimated electorate comprised of 314,492 voters that have a high propensity to vote in the 2014 Republican primary runoff election. Since over 821 people qualified to respond and completed the survey, the flash poll has a 3.42% margin of error.

As the survey results show, there is a high number of undecided voters in all the races. When the undecided rate is so high, many currently undecided voters skip the election although they have a high propensity to participate in primary runoffs and opted-in to the survey.

The Secretary of State race appears to be the closest by far compared to the other statewide runoffs. John Merrill has a slight lead on Reese McKinney (24.2% – 23.0%) with a large number of undecided voters (52.9%). In the key Birmingham media market, Merrill leads by 12.1 points.

In the PSC race, incumbent Terry Dunn (22.4%) trails challenger Chip Beeker (30.8%). Beeker is doing very well in the Birmingham media market (41.1%), which will end up being the largest voting block in the state. Dunn leads in the Montgomery market (33.0%).

Jim Zeigler's (30.5%) perennial candidate status continues to help him in the Auditor's race. The other recognizable name – Dale Peterson (21.5%) – trails by 9 points. As we saw in the primary, look for the undecided voters who show up to lean heavily toward Zeigler.

One of the most interesting questions in this survey was who Republican primary voters intend to support in the 2016 presidential primary. Former Florida Governor Jeb Bush led the pack with 19.8%, followed by surgeon Ben Carson (12.6%) and Kentucky Senator Rand Paul (10.5%). The winner of Alabama's 2012 primary, Rick Santorum, came in seventh (5.3%), and Texas Governor Rick Perry was two spots ahead (7.2%). Tea Party voters evenly support J. Bush (14.5%), Carson (14.7%), and Paul (13.0%). The Birmingham media market saw the largest gap among the top three – J. Bush (22.4%), Carson (11.3%), and Paul (9.7%).

Consistent Republican primary voters view themselves as conservative (73.3%) with a high number being "very conservative" (42.8%), but they do not see themselves lining up 100% with the Tea Party. Only a small segment (16.3%) of the respondents stated that they agree with all of the Tea Party's views. A larger number (40.1%) tend to agree with most of what the



Tea Party believes, with the rest (43.6%) having some or no agreement. The Tea Party is strongest in the non-media market areas and the Birmingham market.

Although we pegged turnout above 300k for modeling and weighting purposes, we would not be surprised if it dips below that number. As stated at the beginning, having this many undecided voters in all races this close to Election Day does not bode well for turnout.



Alabama Statewide- 2014 Republican Primary Runoff Flash Poll

Conducted July 7 - 8, 2014

N=314,492 | n=821 | (+/-3.42%)



How likely are you to vote in the July 15th Republican primary runoff election for state and local candidates?

| | Total |
|-------|-------|
| Total | 821 |
| Def | 706 |
| | 86.0 |
| Prob | 115 |
| | 14.0 |

Secretary of State

| | Total |
|----------|-------|
| Total | 821 |
| McKinney | 189 |
| | 23.0 |
| Merrill | 199 |
| | 24.2 |
| Undec | 434 |
| | 52.9 |

Public Service Commission

| | Total |
|--------|-------|
| Total | 821 |
| Beeker | 253 |
| | 30.8 |
| Dunn | 184 |
| | 22.4 |
| Undec | 384 |
| | 46.8 |

Auditor

| | Total |
|----------|-------|
| Total | 821 |
| Peterson | 176 |
| | 21.5 |
| Zeigler | 251 |
| | 30.5 |
| Undec | 394 |
| | 48.0 |

Alabama Statewide- 2014 Republican Primary Runoff

At this point, who are you most inclined to support in the 2016 Republican primary for president?

| | Total |
|----------|-------------|
| Total | 821 |
| J. Bush | 163 19.8 |
| Carson | 103 12.6 |
| Christie | 72 8.8 |
| Cruz | 46 5.6 |
| Jindal | 32 3.9 |
| Paul | 87 10.5 |
| Perry | 59 7.2 |
| Santorum | 44 5.3 |
| Walker | 29 3.6 |
| Undec | 186 22.6 |

How do you consider your political views in relation to those of the Tea Party?

| | Total |
|-------|-------------|
| Total | 821 |
| All | 133 16.3 |
| Most | 330 40.1 |
| Some | 258 31.5 |
| None | 99 12.1 |

And in terms of your personal political ideology, would you consider yourself?

| | Total |
|---------|-------|
| Total | 821 |
| Ver Con | 351 |
| | 42.8 |
| Som Con | 251 |
| | 30.5 |
| Indep | 178 |
| | 21.7 |
| Som Lib | 28 |
| | 3.5 |
| Ver Lib | 13 |
| | 1.6 |

And are you male or female?

| | Total |
|-------|-------|
| Total | 821 |
| F | 421 |
| | 51.3 |
| M | 400 |
| | 48.7 |

What age range do you fall within?

| | Total |
|-------|-------|
| Total | 821 |
| 18-34 | 26 |
| | 3.1 |
| 35-49 | 116 |
| | 14.1 |
| 50-64 | 273 |
| | 33.2 |
| 65+ | 406 |
| | 49.5 |

Alabama Statewide- 2014 Republican Primary Runoff

Media Market

| | Total |
|-------|-------------|
| Total | 821 |
| BHM | 295 35.9 |
| HSV | 193 23.5 |
| MGM | 117 14.2 |
| MOB | 114 13.9 |
| OTH | 103 12.5 |

Primary Propensity Zone

| | Total |
|---------|-------------|
| Total | 821 |
| Lowest | 49 6.0 |
| Medium | 169 20.5 |
| High | 260 31.7 |
| Highest | 343 41.7 |