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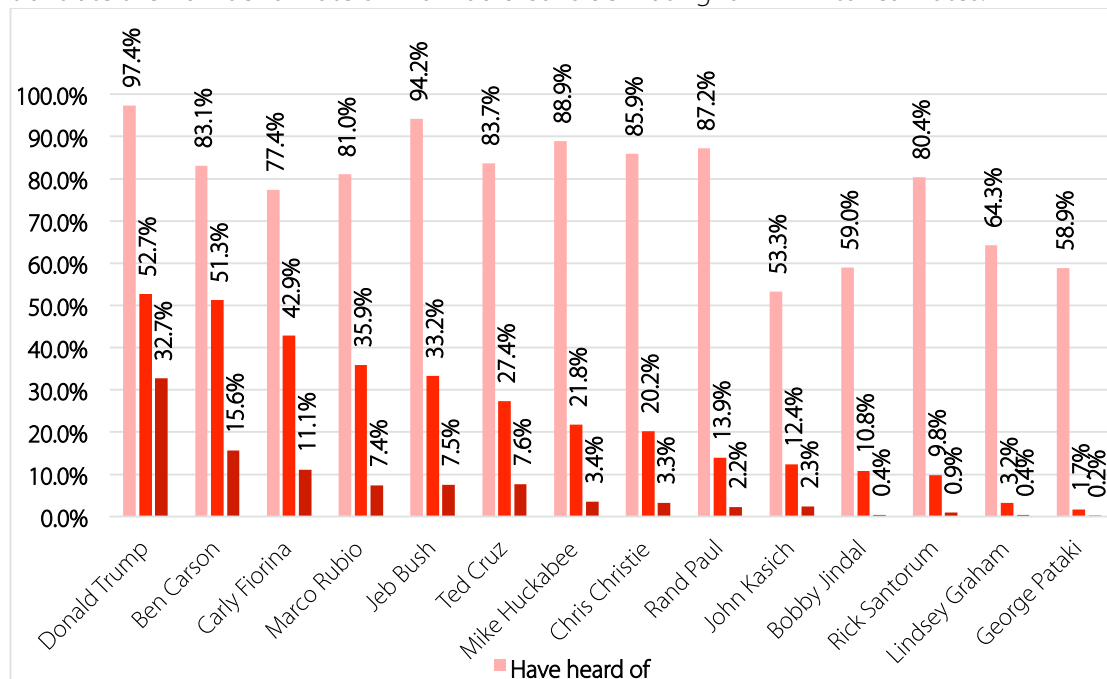
CA Intelligence Report

With only four months to go until Iowa, when the candidates running to be the Republican nominee for president will face their first big test, the race is defying expectations, with several key phenomena emerging.

Teflon Trump

While the chattering class is still predicting that GOP primary voters will “come to their senses” and select a so-called “establishment candidate” in the end, Trump’s support is showing no signs of softening as yet. In terms of overall support he is far ahead at 32.7%, double that of second-place Ben Carson, who stands at 15.6% in voting intention, and Carly Fiorina, who has leapt into third place at 11.1%.

That said, Trump and Dr. Carson are now in a virtual tie in terms of the number of voters who would consider voting for them (52.7% for Trump vs. 51.3% for Carson). Furthermore, while nearly all (97.4%) GOP primary voters know who Trump is, only 83.1% have heard of Carson and only 77.4% have heard of Fiorina. It’s possible that more exposure for the second and third place candidates could render them less appealing to the electorate, but so far it has had the opposite effect. The question now is whether Trump is bumping up against the ceiling of his support, or whether he can translate the number of voters who would consider voting for him into real votes.

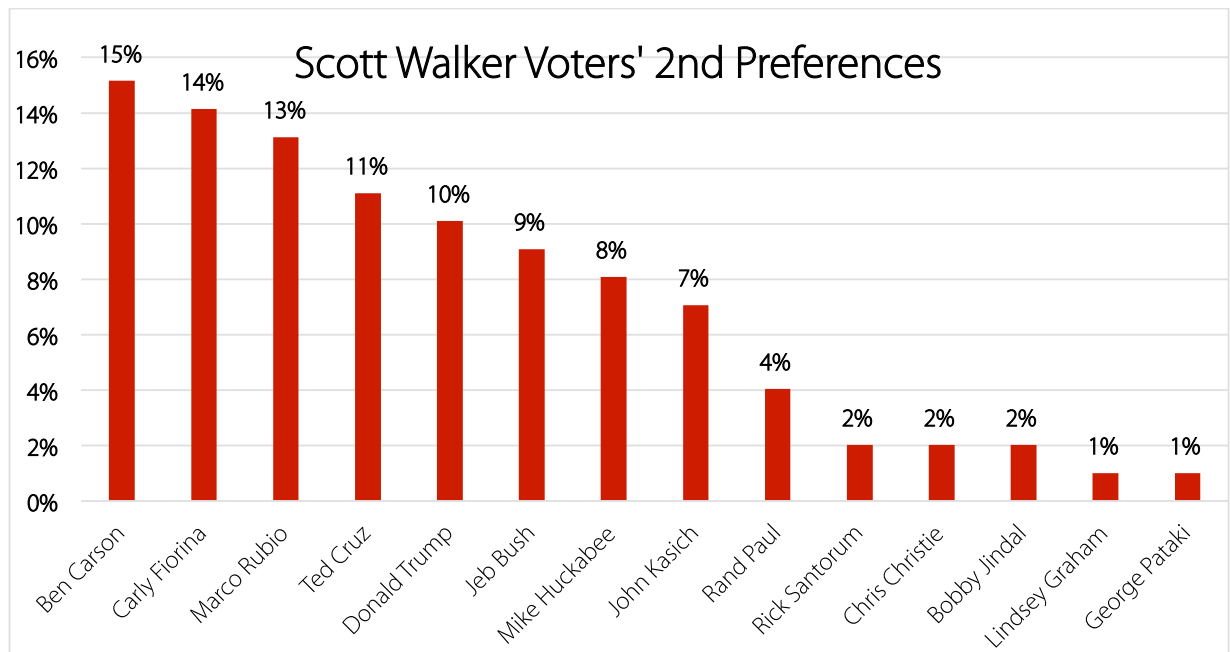


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The rise of the outsider, and the battle to be the establishment candidate

The rise of the outsider, embodied by Carson, Trump and to some extent Ted Cruz, has been well chronicled. The fight for dominance in the outsider space has up to this point been the most interesting story this cycle, while the more benign battle between Jeb Bush and Scott Walker over who will wear the establishment mantle has simmered quietly in the background.

No more. Walker's unexpected flameout and Bush's failure to live up to expectations have thrown the race to be the mainstream candidate wide open. And, interestingly, while the contest was often framed in the media as a battle between Bush and Walker, an analysis of Walker supporters' second preference candidate reveals that Bush was not even in their top five, indicating that the Wisconsin Governor's support is very much up for grabs.



Marco Rubio and Carly Fiorina are the most obvious alternatives to Governor Walker. As a Senator and a former CEO, respectively, both Rubio and Fiorina meet the criteria for appealing to the Republican mainstream. However, as a young Spanish-speaking Latino and a woman who has never held elected office, both of their brands have outsider elements that may enable them to capitalize on the desire for fresh faces.

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They also both seem like attractive moderate choices for more cautious primary voters, making this an interesting battle to watch.

Fiorina began the race as an underdog but the more voters have seen of her the more they've liked her. She has already jumped from the so-called 'kids table' debate of second-tier candidates into the main debate, where her strong performance – including a pointed riposte to Trump's attack on her looks – has propelled her near the top of the pack.

Meanwhile, Rubio entered the race in Bush's shadow, with the latter – somewhat condescendingly – commenting that he would not attack him during the campaign. But the Florida Senator's strong performance in the debates combined with his potential to appeal to a new generation of Republican voters now has him tied with Bush on voting intention, at 7.5%, and surpassing him in terms of the number of voters who would consider voting for him (35.9% vs. 33.2% for Bush).

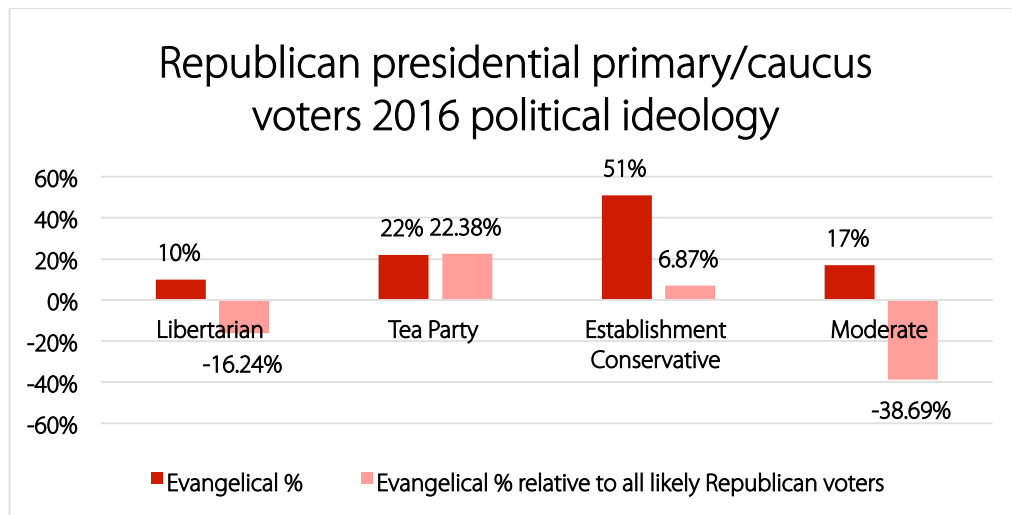
Furthermore, Rubio and Fiorina have the lowest 'heard of' scores among the top nine GOP candidates, at 77.4% and 81% respectively, indicating that if they continue their strong performances they've got plenty of room for growth.

It should be noted that Cruz could also be a potential alternative to Walker, but an analysis of the make-up of his support base shows that at present he lags severely (at 5%) among moderates, and also to a less severe extent (27.8%) among establishment voters, who are the second and first largest voting blocs respectively. Cruz polls highly (31.7%) among Tea Party voters, but they make up only 17.5% of the overall electorate.

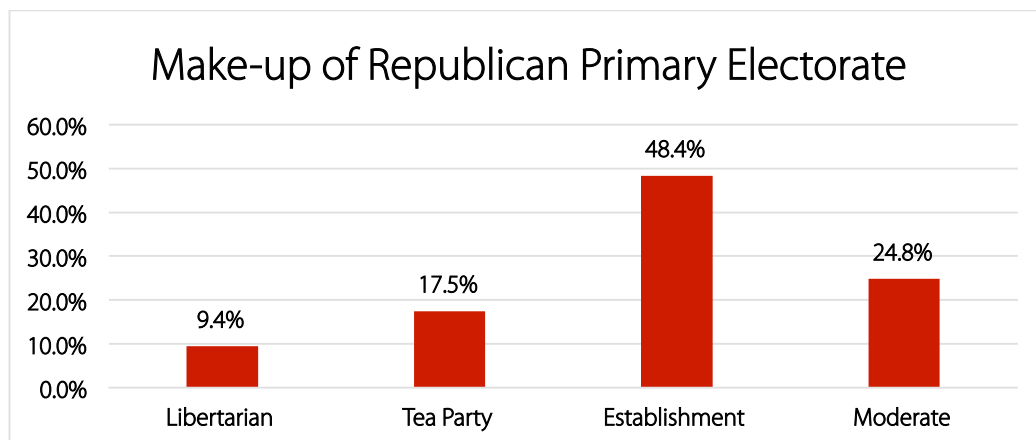
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The evangelical question

Cambridge Analytica's research shows that over a third (36.2%) of the GOP primary electorate identify as evangelical. These evangelical voters are spread unevenly over the various ideological groups within the party, with a slim majority (51%) congregating in the establishment column.

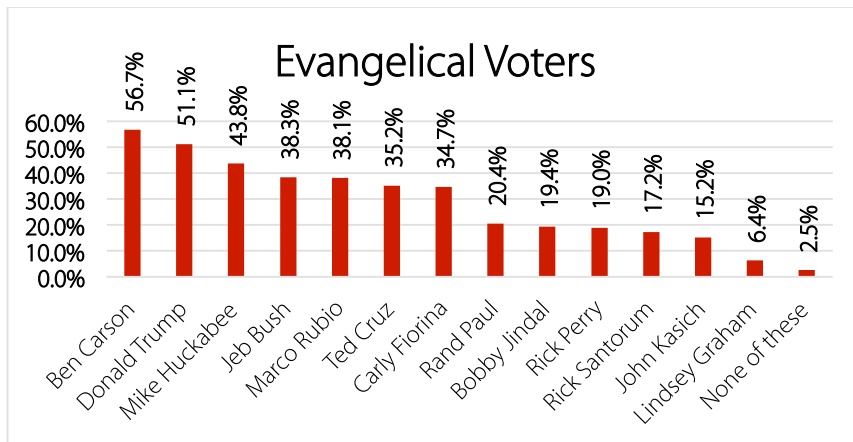


The so-called establishment voters, at 48.4%, form by far the largest political voting bloc of the GOP electorate as a whole. They are followed by moderate voters, at 24.8%, then Tea Party voters, at 17.5%. Libertarian voters, at 9.4%, form the smallest bloc. This helps explain why the candidates in the Top Five draw at least a third of their support from establishment voters.

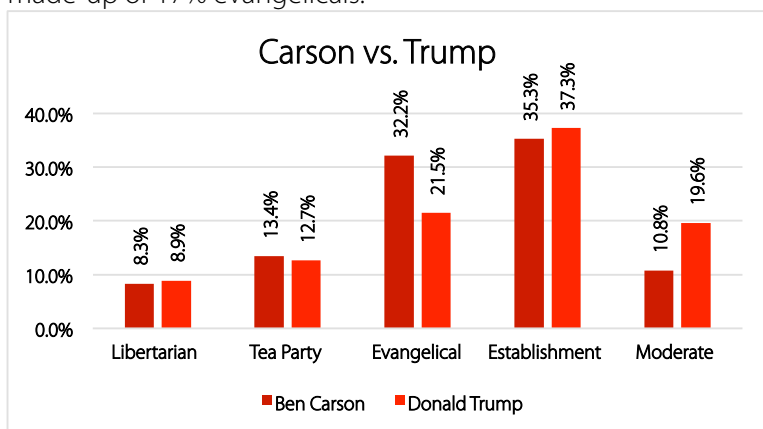


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Ben Carson, at 56.7% consideration in our latest evangelical report, is the candidate leading among evangelicals, but Donald Trump is not too far behind at 51.1% consideration. While Carson is particularly vocal on issues that should appeal to evangelicals, such as his staunch opposition to abortion and support for traditional marriage, it is worth noting that Donald Trump has not made religious and/or social issues a focus of his campaign, and yet still enjoys the support of a sizeable number of evangelicals. He's been far more vocal on immigration, the economy, national security and the Iran deal, which are all issues that conventional thinking would say are more pertinent to other swathes of the GOP primary electorate. Indeed, the evangelicals' top picks largely mirror those of the GOP primary electorate as a whole. The one notable exception is Mike Huckabee, whose consideration is substantially higher (43.8%) among evangelicals than with the wider primary electorate (21.8%).



Looking closely at the make-up of the two front-runners' support, we see that they are nearly identical except Carson does draw a larger proportion (32.8% vs. 22% for Trump) from evangelicals, but that Trump draws more from the moderate bloc (20% vs. 11% for Carson), which is the second largest group in the overall electorate and is only made-up of 17% evangelicals.



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This raises the question of whether a large number of evangelicals would ultimately be open to continuing supporting a candidate like Trump, whose personal history, past policy positions on social issues and rhetoric do not jibe with their evangelism, and eventually carrying that support to the ballot box. Or, as may turn out to be the case, the candidate who will capture the evangelical bloc will be whoever can combine Trump's bombastic approach with the piousness of Carson and Mike Huckabee.