

MEMORANDUM

From: Frank Luntz
To: Interested Parties
Re: The Attitudes and Priorities of the Snapchat Generation
Date: February 18, 2016

If you're looking for a breath of fresh air in this increasingly noxious political environment, wherein anger-driven voters permeate both political parties, look no further than America's youth. They're refreshingly, resoundingly sunny about America's future.

That's the key finding of our just-completed national survey of 1,000 young Americans, aged 18 to 26 conducted February 11-14. We call them "***The Snapchat Generation.***" These first- and second-time voters see things much differently and with much more *genuine hope* than the older eyes that will mostly read this memo. And they'll be bringing their *own* ideas to the polls – in droves!

Consider the following results:

- (1) **Barack Obama is no longer No. 1 in the hearts and minds of young Americans. Nearly one in three (31%) chose Bernie Sanders as the political figure they like and respect most, followed by President Obama (18%) and Hillary Clinton (11%).** The Republicans don't just lag behind, they limp, with Donald Trump in at 9%, Ted Cruz at 5%, and Marco Rubio at 3%.
- (2) **An astounding 88% say they are at least somewhat "optimistic" about their own future, including a robust 54% who report they are "extremely" or "very" optimistic.** In fact, one in four is *extremely* optimistic, while just 12% are pessimistic. Make no mistake: this is the stuff of serious sea change for America. More on that later.
- (3) **Fully 61% of young people believe America's "best days are still ahead of us," compared to just 39% who say our "best days are behind us."** Similarly, while 54% of younger Americans still feel the nation is off on the wrong track right now, that's much lower than the 63% wrong track average among ALL Americans, according to the Real Clear Politics Average. Gallup's rock-solid "satisfied-dissatisfied" tracking poll has 76% dissatisfied among the overall population. This generation simply rejects the gloom and doom, even as their parents and grandparents fret that America is in decline. The contrast couldn't be sharper – and it has significant ramifications politically.
- (4) **Fully 87% are likely to vote in the coming Presidential election.** The Obama youth turnout was not just because it was for Barack Obama. This election cycle has clearly captured the imagination of first- and second-time voters. In fact, two-thirds (65%) are "*extremely likely*" to participate. Politicians, ignore young voters at your own peril. Because they sure as hell aren't ignoring you.

Through this poll, in partnership with Snapchat, we've listened to how young people feel – because the future belongs to them. So let's go deeper into the findings.

HOW DOES THE SNAPCHAT GENERATION FEEL ABOUT THE FUTURE?

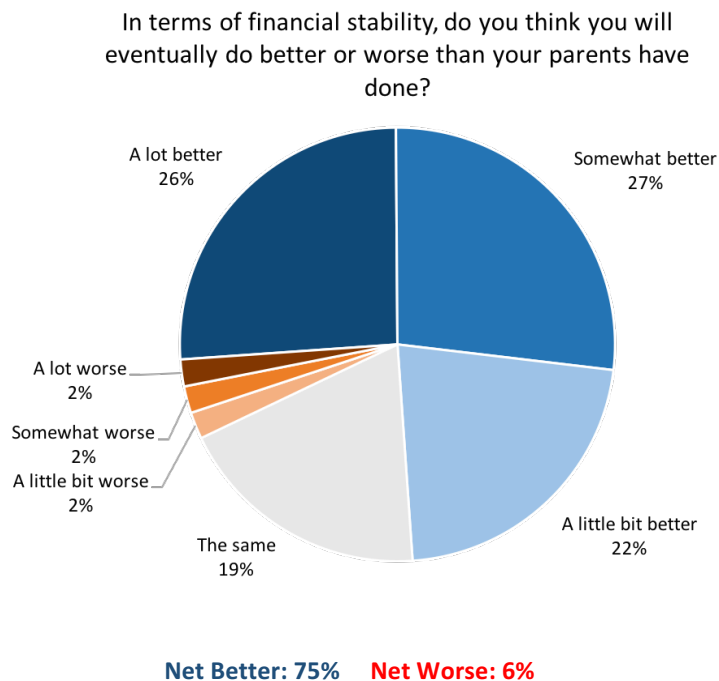
Before we move forward with more polling data, let's take a step backwards in time.

Imagine, just for a moment, *the life experience* of an 18- to 21-year-old, first-time voter. Their experiences are fundamentally different, and this might explain why their attitudes are so much more positive than older voters.

- They'd barely finished preschool when the Twin Towers collapsed.
- When the big banks collapsed, they were in middle school.

It's not that they're ambivalent; it's just that they didn't live it. While they might have seen their parents stress over finances, they didn't have bank accounts to lose for themselves. They know it *happened*, and that it was really terrible for their parents. But that was *mom and dad's* fight, not *theirs*.

Perhaps that's part of why fully 75% of young people think they will do better financially than their parents, including one in four who think they'll do "a lot better." Only 6% say they'll do "worse."



This is important. It's a seismic shift in electorate mentality, a schism between generations that could have *huge* impacts for many elections to come. And it is completely contrary to our own polling last year, when 54% of Americans said their children and the next generation will do WORSE than they did. This isn't a perception gap. It's a *chasm*.

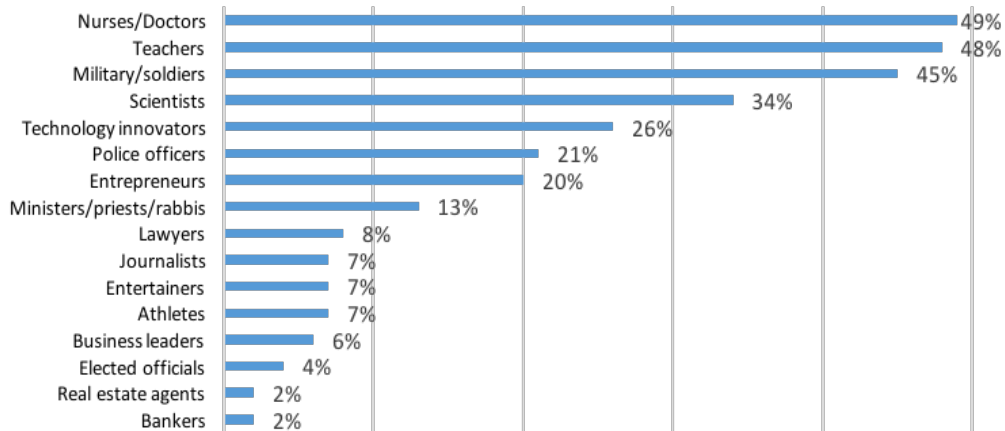
In the eight years since the financial meltdown, my company has extensively researched the opinions, fears, and hopes of Americans in the post-collapse world. Time after time, and year after year, voters told us the same bottom line conclusion: they were *increasingly* worried their children would inherit a *worse* future than they did, from their own parents. And frankly, they felt horrible about it – like they were violating the most sacred American promise, which is that you leave something better for the next generation.

Yet these newly minted voters and those back for round two of presidential voting are shouting right back, “Don’t worry about us! We got this.” For them, *hope, change, and optimism* aren’t political buzzwords. They’re real, because that’s exactly what they expect for themselves and their generation. It’s our most stunning survey finding.

WHO DOES THE SNAPCHAT GENERATION RESPECT THE MOST?

What profession do these young people respect most? Simply stated, those who serve, heal, and protect. Given a list of 16 professions, respondents by wide margins said they most respected nurses and doctors (49%), teachers (48%), and the military (45%).

Which of the following professions do you respect the most? (Top 3 choices combined)



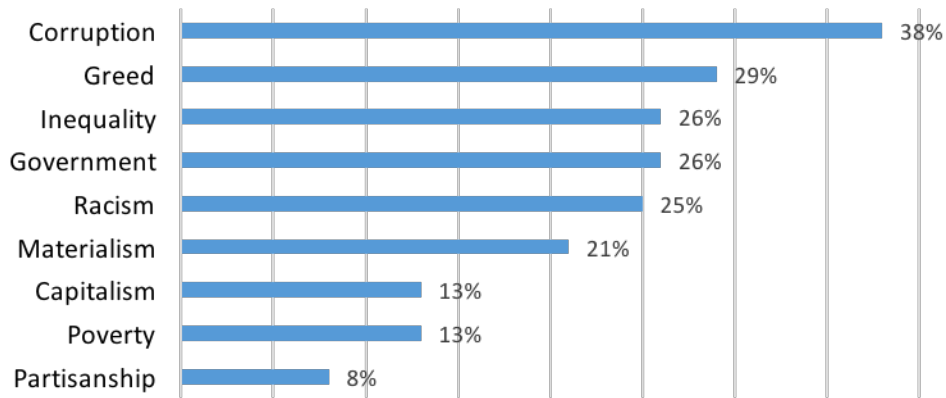
Police officers placed sixth, at 21%, better than I would have expected considering recent the publicity. They were followed by entrepreneurs/small business owners at 20%, worse than I would have expected.

At the very bottom were business leaders at 6%, elected officials (a nicer way to say politicians) at 4% and bankers dead last at 2%. Is there any surprise then that Bernie Sanders has come so far with a campaign aimed squarely at the banks, the politicians and the special interests? He’s hitting the same people despised by his core constituency – and he’s doing it incredibly well. Young people respect people who get their scrubs, uniforms, and hands dirty – not people who keep their expensive suits spotless.

WHAT DOES THE SNAPCHAT GENERATION REJECT THE MOST?

“Corruption” is Public Enemy No. 1 to young Americans. They think it’s rampant, from Wall Street to Washington, and this rejection of corruption underlies all of their public policy opinions.

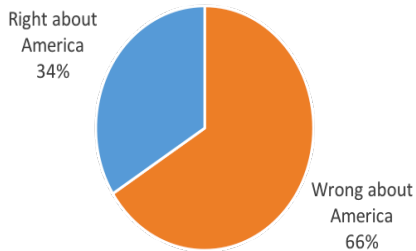
If you could describe America's problems in one word, which word would you choose?



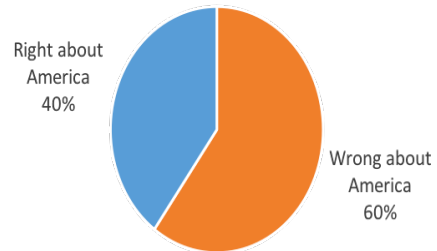
Now, they didn’t rank *“capitalism”* as a top problem, but that *doesn’t* mean they’re in love with it. Quite the contrary. We asked them which is the most *“compassionate”* system, and an overwhelming 58% chose *“socialism”* over *“capitalism”* (33%). Heck, even *“communism,”* drew 9%. By a 2-1 margin, young voters see compassion in collectivism, not capitalism.

An almost identical 66% think that corporate America *“embodies everything that is wrong with America,”* compared to just 34% who say that it’s what’s *“right”* with America. [Note to any politicians who are reading this: you’re no better off. Sixty percent say Washington embodies what’s *wrong* with America, too. Only 40% say it embodies what’s *right*.]

Generally speaking, do you think that **corporate** America embodies everything that is ... ?



Generally speaking, do you think that **Washington** embodies everything that is ... ?



The hostility of young Americans to the underpinnings of the American economy and the American government ought to frighten every business and political leader as much as they excite activists for Sanders and, to a lesser degree, Clinton activists.

It is therefore not surprising that the No. 1 issue for the Snapchat Generation is *income equality*, which at 28%, ranks first among 16 pressing issues. Those respondents said they were “worried [most] about the widening gap between the rich and poor. The rich aren't paying their fair share and the poor are suffering.”

Political leaders have lots of challenges before them. What do you think is the most pressing issue facing America today?	
Income inequality: I'm worried about the widening gap between the rich and poor. The rich aren't paying their fair share and the poor are suffering	28%
Education: I'm worried about the cost of education. Americans won't be able to afford the effective education they need to succeed in college, careers, and life.	24%
National security and terrorism: I'm worried that America and the world are less safe, less secure, and less stable.	22%
Race relations: I'm worried that we are deeply divided by race, and it's getting worse.	21%
Government accountability: I'm worried that government is ineffective and not accountable to the people.	21%
Jobs: I'm worried that I can't find a job or won't find the right job for me, and that others will continue to be unemployed or underemployed.	20%
Healthcare: I'm worried that I will pay more and more for insurance that covers less and less, and that my healthcare choices will be restricted.	19%
Social Issues: I am worried about issues like gay marriage and abortion.	19%
Corporate America: I'm worried that corporations are too powerful and have too much control over our lives.	19%
Values: I'm worried that the values that make America great are being undermined and destroyed.	18%
Environment: I'm worried that pollution and climate change are destroying our planet.	18%
Government spending: I'm worried that Washington wastes too much money on programs we can't afford. The debt and deficit are too high.	18%
Student debt: I'm worried about student loans – I'll owe so much that I'll never get ahead or even caught up.	16%
Taxes: I'm worried that taxes will go up. We are already taxed too much, and we can't afford to pay more.	14%
Crime and Drugs: I'm worried that the crime rate is getting worse and that illegal drugs are doing real damage to society.	12%
Energy: I'm worried that we aren't doing enough to develop 21st century clean energy sources that will make us energy independent.	9%

WHO DOES THE SNAPCHAT GENERATION TRUST MOST?

The political alliances of first- and second-time voters are problematic for the GOP. Fully 44% of the 18-to-26 population we interviewed are aligned with the Democrats. That’s not a particularly high score, until you consider that just 15% identify as Republicans. The remaining 42% identify as independents. So for the third presidential election in a row, the Democrats have a significant advantage among young voters – and this time that advantage may be the largest yet.

But a huge bloc remains in play. So let’s look a little closer at how swing-voting young Americans look at the presidential hopefuls, and President Obama ...

What I find *most* fascinating is that 35% of young independents named **Senator Sanders the “most trusted and respected” political leader.** That’s more than Barack Obama (15%) and Hillary Clinton (6%) combined. And it’s more than **ALL** the Republicans in the field – combined. He’s not just carving out a niche on the far left of the youth electorate; he’s drawing equally from swing voters and staunch liberals alike.

Young people don’t just *think* differently. They embrace *difference* (and diversity) as a mark of character. It’s an attribute they want in a candidate. They loved it about Obama, and now they love it even more from Sanders.

But Obama still holds one distinction ahead of Sanders, Clinton and every other politician: the preferred dinner guest of the Snapchat Generation ...

If you could have dinner with any of the following people, whom would you choose? (Top three combined).			
Barack Obama	29%	Michelle Obama	10%
Jennifer Lawrence	28%	Donald Trump	10%
Ellen DeGeneres	27%	LeBron James	8%
Bill Gates	27%	Kanye West	8%
Bernie Sanders	22%	Hillary Clinton	8%
Taylor Swift	22%	Justin Bieber	7%
Beyoncé	20%	Brad Pitt	7%
Oprah Winfrey	15%	JJ Watt	6%
Angelina Jolie	13%	Tom Brady	5%
Mark Zuckerberg	12%	Evan Spiegel	2%
Mark Cuban	11%	Sheryl Sandberg	1%

It’s interesting that entertainers do no better or worse than policymakers – because these are different times and this is a different generation. Young Americans have their minds as attuned to the election as they do to the Grammy Awards, and that’s saying a lot. It speaks to their passion and demonstrates their commitment to the world around them.

A FINAL THOUGHT

There are two additional poll findings that are worthy of their own discussion because they say so much about the attitudes of the Snapchat Generation.

- (1) **National boundaries and nationalism just don't mean the same to younger Americans as it does to their parents.** A third of the Snapchat Generation (35%) define themselves as Citizens of the World rather than Citizens of America (65%). Among first time voters, the gap is even narrower: 42% citizens of the world and 58% citizens of America. This is a radical departure from what their parents and grandparents think about America and the world.

Perhaps even more dramatically, nearly six in ten (58%) of the Snapchat Generation believe *"America isn't any better or worse than most other countries,"* while just 42% believe that *"America is exceptional. It's better than every other country in the world."* First and second time voters simply reject the American superiority messaging in favor of the more global approach of the Democrats.

- (2) **We've explored much about what makes young people unique and different from their parents. But let us close with this: on basic core principles, we are still the same regardless of age. When asked what makes America special, opportunity and freedom come first.**

We will always disagree about the best way to protect and expand opportunity and freedom in America, but one thing is clear: the Snapchat Generation loves those values every bit as much as those who came before.

SNAPCHAT QUESTIONNAIRE

Q1. If you could have dinner with any of the following people, whom would you choose? Pick your top three in order. Please take this question seriously. [COMBINED]

	<u>Total</u>	<u>18-21</u>	<u>22-26</u>
Barack Obama.....	29%	30%	29%
Jennifer Lawrence.....	28	27	28
Ellen DeGeneres.....	27	28	26
Bill Gates.....	27	29	25
Bernie Sanders.....	22	32	15
Taylor Swift.....	22	24	20
Beyoncé.....	20	24	17
Oprah Winfrey.....	15	16	14
Angelina Jolie.....	13	14	12
Mark Zuckerberg.....	12	12	13
Mark Cuban.....	11	5	16
Michelle Obama.....	10	13	8
Donald Trump.....	10	4	15
LeBron James.....	8	7	9
Kayne West.....	8	9	7
Hillary Clinton.....	8	5	10
Justin Bieber.....	7	7	7
Brad Pitt.....	7	5	9
JJ Watt.....	6	4	8
Tom Brady.....	5	4	7
Evan Spiegel (creator of Snapchat).....	2	1	3
Sheryl Sandberg.....	1	1	2

Q2. Out of today's major political figures, which do you like and respect the most?

	<u>Total</u>	<u>18-21</u>	<u>22-26</u>
Bernie Sanders.....	31%	40%	24%
Barack Obama.....	18	18	17
Hillary Clinton.....	11	3	17
Donald Trump.....	9	10	9
George W. Bush.....	5	6	4
Ted Cruz.....	5	6	3
Ben Carson.....	4	3	5
Marco Rubio.....	3	4	3
Bill Clinton.....	3	-	5
Elizabeth Warren.....	2	3	2
Rand Paul.....	2	1	3
Mitt Romney.....	2	1	2
Joe Biden.....	1	1	1
Paul Ryan.....	1	2	1
Jeb Bush.....	1	-	2
Carly Fiorina.....	*	1	*
Martin O'Malley.....	*	-	1
Cory Booker.....	*	-	1
Nancy Pelosi.....	*	-	*
Harry Reid.....	*	-	*
Chris Christie.....	*	-	*
Chuck Schumer.....	*	-	*

Now let's focus on what you think about life in America these days...

Q3. Are things in America basically headed in the right direction, or are things pretty seriously off on the wrong track?		Total	18-21	22-26
	Wrong track	54%	51%	57%
	Right direction.....	46	49	43

Q4. Generally speaking, how optimistic are you about America's future? Are America's best days behind us or are they still ahead?		Total	18-21	22-26
	Still ahead.....	61%	60%	62%
	Behind us.....	39	40	38

Q5. First, do you consider yourself more ...		Total	18-21	22-26
	A citizen of America.....	65%	58%	70%
	A citizen of the world	35	42	30

Q6. Which statement regarding America's place in the world comes closer to your view?		Total	18-21	22-26
	America isn't any better or worse than most other countries.....	58%	60%	57%
	America is exceptional. It's better than every other country in the world.	42	40	43

Q7. If you could describe what makes America special in one word - the most important fundamental principle - what word would you choose? [COMBINED]		Total	18-21	22-26
	Opportunity.....	44%	38%	48%
	Freedom.....	40	38	42
	Diversity.....	32	34	31
	Democracy.....	22	26	20
	Equality.....	18	17	18
	Capitalism.....	14	12	16
	Creativity.....	14	17	11
	Justice.....	11	13	10
	Fairness.....	5	6	5

Q8. If you could describe America's problems in one word, which word would you choose? [COMBINED]		Total	18-21	22-26
	Corruption.....	38%	41%	37%
	Greed.....	29	23	33
	Inequality.....	26	23	29
	Government.....	26	20	32
	Racism.....	25	28	23
	Materialism.....	21	30	14
	Capitalism.....	13	16	11
	Poverty.....	13	12	13
	Partisanship.....	8	7	9

Q9. Which of the following professions do you respect the most? [COMBINED]

	Total	18-21	22-26
Nurses/Doctors.....	49%	48%	51%
Teachers.....	48	44	51
Military/soldiers.....	45	47	44
Scientists.....	34	38	31
Technology innovators.....	26	28	25
Police officers.....	21	21	22
Entrepreneurs/Small business owners.....	20	22	19
Ministers/priests/rabbis.....	13	15	12
Lawyers.....	8	12	5
Journalists.....	7	3	10
Entertainers.....	7	3	10
Athletes.....	7	4	8
Business leaders.....	6	6	6
Elected officials.....	4	6	3
Real estate agents.....	2	2	3
Bankers.....	2	2	2

Next, we'd like to talk to you about your values and your expectations for the future...

Q10. Generally speaking, how optimistic are you about your personal future—think about things like finding and keeping a good job, paying off your student loan debt, and being able to afford the lifestyle you want.

	Total	18-21	22-26
Extremely optimistic.....	23%	21%	25%
Very optimistic.....	31	27	35
Somewhat optimistic.....	34	40	29
Somewhat pessimistic.....	9	9	9
Very pessimistic.....	2	2	1
Extremely pessimistic.....	1	1	1
OPTIMISTIC (NET).....	88%	88	88
PESSIMISTIC (NET).....	12	12	12

Q11. In terms of financial stability, do you think you will eventually do better or worse than your parents have done?

	Total	18-21	22-26
A lot better.....	26%	21%	29%
Somewhat better.....	27	30	25
A little bit better.....	22	21	22
The same - neither better nor worse.....	19	23	16
A little bit worse.....	3	1	5
Somewhat worse.....	2	1	2
A lot worse.....	2	3	1
BETTER (NET).....	75%	73	76
WORSE (NET).....	6	4	8

Q12. Political leaders have lots of challenges before them. What do you think is the most pressing issue facing America today? [COMBINED]

	<u>Total</u>	<u>18-21</u>	<u>22-26</u>
Income inequality: I'm worried about the widening gap between the rich and poor. The rich aren't paying their fair share and the poor are suffering	28%	30%	27%
Education: I'm worried about the cost of education. Americans won't be able to afford the effective education they need to succeed in college, careers, and life.....	24	24	23
National security and terrorism: I'm worried that America and the world are less safe, less secure, and less stable.....	22	22	22
Race relations: I'm worried that we are deeply divided by race, and it's getting worse.....	21	22	21
Government accountability: I'm worried that government is ineffective and not accountable to the people.....	21	19	22
Jobs: I'm worried that I can't find a job or won't find the right job for me, and that others will continue to be unemployed or underemployed.....	20	18	22
Healthcare: I'm worried that I will pay more and more for insurance that covers less and less, and that my healthcare choices will be restricted.....	19	16	22
Social issues: I am worried about issues like gay marriage and abortion.....	19	24	16
Corporate America: I'm worried that corporations are too powerful and have too much control over our lives... ..	19	17	19
Values: I'm worried that the values that make America great are being undermined and destroyed.....	18	16	20
Environment: I'm worried that pollution and climate change are destroying our planet.....	18	21	16
Government spending: I'm worried that Washington wastes too much money on programs we can't afford. The debt and deficit are way too high.....	18	16	19
Student debt: I'm worried about student loans - I'll owe so much that I'll never get ahead or even caught up.....	16	20	14
Taxes: I'm worried that taxes will go up. We are already taxed too much, and we can't afford to pay more.....	14	13	14
Crime and drugs: I'm worried that the crime rate is getting worse and that illegal drugs are doing real damage to society.....	12	11	13
Energy: I'm worried that we aren't doing enough to develop 21st century clean energy sources that will make us energy independent.....	9	9	10

Q13. Which type of political system do you think is the most compassionate?

	<u>Total</u>	<u>18-21</u>	<u>22-26</u>
Socialism	58%	61%	55%
Capitalism.....	33	28	37
Communism	9	10	8

Now just a few election questions ...

Q14. As you may know, there will be an election for U.S. President in November 2016. How likely are you to vote in the November 2016 election for President?

	Total	18-21	22-26
Extremely likely.....	65%	68%	63%
Very likely	21	18	24
Somewhat likely.....	9	11	8
Neither likely nor unlikely.....	3	2	4
Somewhat unlikely.....	*	1	*
Very unlikely	*	-	*
Extremely unlikely.....	1	-	1
VERY LIKELY (NET).....	87%	86	87
EVERYONE ELSE (NET).....	13	14	13

Q15. How closely have you followed the 2016 Presidential election and campaigns?

	Total	18-21	22-26
Extremely closely.....	23%	19%	25%
Very closely	34	36	32
Somewhat closely.....	30	28	31
Only a little.....	12	14	10
Not at all	2	2	2
VERY CLOSELY (NET).....	57%	55	58
EVERYONE ELSE (NET).....	43	45	42

Q16. Regardless of how you plan to vote, when it comes to politics do you generally think of yourself as a...?

	Total	18-21	22-26
Strong Democrat	28%	28%	28%
A Weak Democrat	16	16	15
Independent, but lean Democrat	18	21	16
Independent.....	16	12	19
Independent, but lean Republican.....	8	7	8
Weak Republican	7	6	7
Strong Republican.....	8	10	7
DEMOCRAT (NET)	44%	45	43
SWING (NET).....	42	40	43
REPUBLICAN (NET).....	15	15	14

Q17. And if the election were held today, who would you vote for?

	Total	18-21	22-26
Bernie Sanders.....	45%	55%	38%
Hillary Clinton	19	11	25
Donald Trump.....	10	9	11
Ted Cruz.....	8	7	8
Marco Rubio	7	7	6
Ben Carson.....	6	6	5
John Kasich	3	1	4
Jeb Bush.....	2	2	2
Mike Bloomberg.....	1	2	1

Now we have a few questions on corporate America, the economy, and what you really expect and want from a company you work for. If you're not working yet, don't worry - we want to know what you would like from your ideal workplace.

Q18. Generally speaking, do you think corporate America embodies everything that is...		<u>Total</u>	<u>18-21</u>	<u>22-26</u>
	Wrong about America.....	66%	74%	59%
	Right about America.....	34	26	41

Q19. Generally speaking, do you think Washington embodies everything that is...		<u>Total</u>	<u>18-21</u>	<u>22-26</u>
	Wrong about America.....	60%	63%	58%
	Right about America.....	40	37	42

Q20. From which of the following resources do you get most of your current event and political news? [COMBINED]		<u>Total</u>	<u>18-21</u>	<u>22-26</u>
	By using social media sites like Twitter, Facebook, or Snapchat.....	37%	40%	34%
	By using Google search.....	27	31	24
	By watching cable news on TV, such as Fox News, CNN, CNBC or MSNBC.....	27	27	27
	Online, by visiting news websites like The New York Times, Wall Street Journal, or CNN.COM.....	26	24	28
	Watching local news on your local TV news station.....	20	23	18
	By visiting online-only news websites like Huffington Post, Yahoo and Vice.....	19	13	24
	By using mobile apps and alerts from a variety of news sites.....	16	17	15
	By watching network news on ABC, CBS or NBC.....	15	15	15
	By reading a daily newspaper such as the New York Times, Wall Street Journal or USA Today print editions.	8	7	9
	By reading blogs and commentary from sites like Townhall, RedState, Salon, and Daily Kos.....	4	2	6

Q21. If you had to choose, which of the following statements regarding your news consumption comes closest to your own personal position?		<u>Total</u>	<u>18-21</u>	<u>22-26</u>
	I tend to just skim the headlines or breaking news of the day to get a general sense of the most important issues, so that I know a little bit about a wide variety of topics.....	56%	51%	59%
	I like to read in-depth articles about a few subjects, so that I know a lot about them—even if that means I know less about other subjects.....	44	49	41