

April 23, 2009

To: Interested Parties

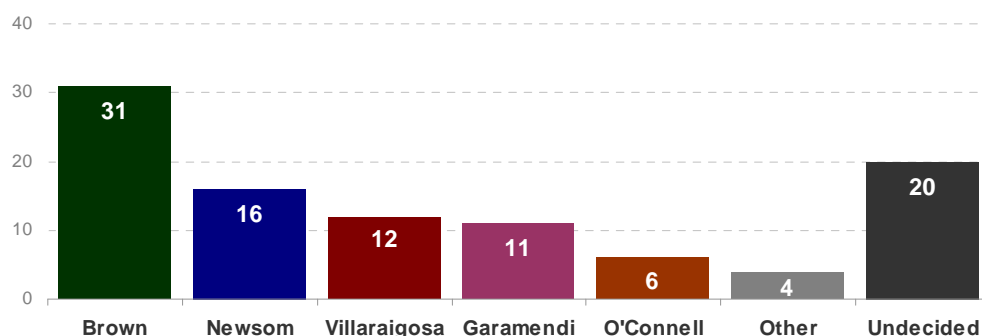
From: Ben Tulchin and Julie Lein, Tulchin Research

Re: In California Governor's Race, Democrats Poised for a Fierce Battle

A recent statewide survey shows that the Democratic primary campaign for Governor of California will be a highly competitive and hard-fought election. With a deep field of established candidates, voters will have a difficult decision to make next June.

The Governor's race has echoes of the 2008 Democratic presidential primary campaign, and is taking shape as a Future versus Past election. Currently, the established and best known candidate, Attorney General (and former Governor) Jerry Brown leads the field. But a young rising star, San Francisco Mayor Gavin Newsom, is emerging as the leading contender as he now polls ahead of a talented field that includes Los Angeles Mayor Antonio Villaraigosa, Lieutenant Governor John Garamendi, and Superintendent of Public Instruction Jack O'Connell. This race is still very much in flux as 2 out of 5 voters are either undecided (20%) or only leaning towards their candidate (19% of Democratic primary voters).

Democratic Primary Governor's Race



- **Jerry Brown's early lead:** Nearly one in three (31%) Democratic primary voters initially prefer Jerry Brown, giving the former Governor an early lead. Brown's base supporters include seniors (voters age 65 and older), Democratic men, and older non-college educated voters. However, Brown faces a few serious hurdles:
 - As a known entity and someone who was governor 30 years ago, Brown will face real challenges in appealing to voters who are not current supporters, and particularly with voters under 50 years of age.
 - The higher the turnout among voters, especially younger voters, the worse Brown fares. If each of the candidates in this crowded field can raise money and increase turnout by engaging voters, this will have adverse affects for Brown.
- **Mayor Gavin Newsom has emerged as a leading contender:** Gavin Newsom presently draws 16% of the vote, garnering stronger support from the Bay Area, younger voters (under 40), women under 50, and voters with a post-graduate degree.
- **Mayor Antonio Villaraigosa:** The Los Angeles Mayor currently holds 12% of the Democratic primary vote. He has a slight edge among Latinos, garnering three in ten

(29%) Latino votes, as opposed to Brown's 25% support and Newsom's 12%. The LA Mayor also makes inroads with younger non-college voters (many of whom are Latino). But Villaraigosa struggles in Los Angeles County and the broader LA media market, trailing Jerry Brown by a 15-point margin (34% for Brown to 19% for Villaraigosa), with Newsom drawing 10%, Garamendi 8% and O'Connell 4%.

- **Lieutenant Governor John Garamendi:** The Lieutenant Governor stands at 11% support among voters. Garamendi carries a solid base of one in five voters in Sacramento (20%), though he still trails Brown in this market, and the Central Valley (18%), though both Brown and Newsom have a stronger hold in this region.
- **Superintendent of Public Instruction Jack O'Connell** – O'Connell trails the field with 6% of the vote. O'Connell draws stronger support in Sacramento at 13%, but he struggles to compete with the four candidates in other areas of the state.

The early results signal a challenging and competitive race ahead. Can Brown hold on to the lead? Can he increase his support? Will voters send Brown back to the governor's office after a 30-year hiatus? Or will voters look for a new face, someone who may represent the future of the party, such as Mayor Newsom or Mayor Villaraigosa? The election is more than a year away, and there is still a lot of campaigning left before next June.

Methodology

From March 31 to April 2, 2009, Tulchin Research conducted a telephone survey among 472 likely Democratic primary voters in California. The margin of error is +/- 4.5%.

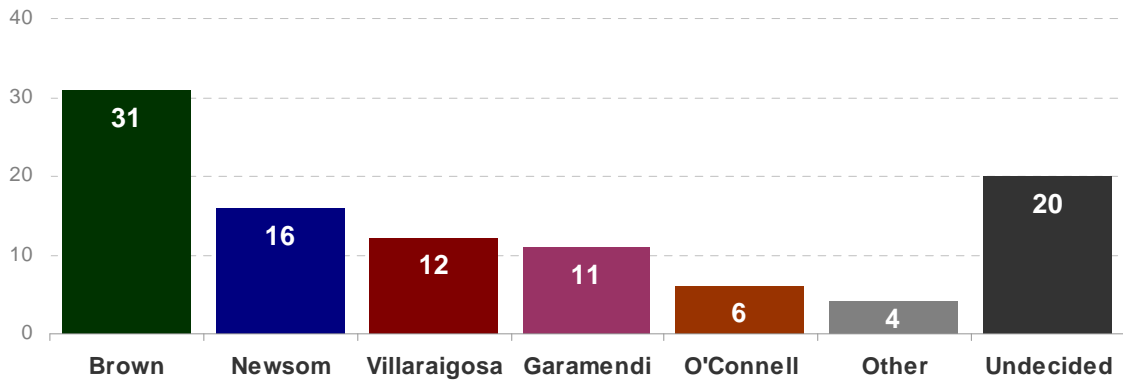
Appendix: Key Graphs

Tulchin Research

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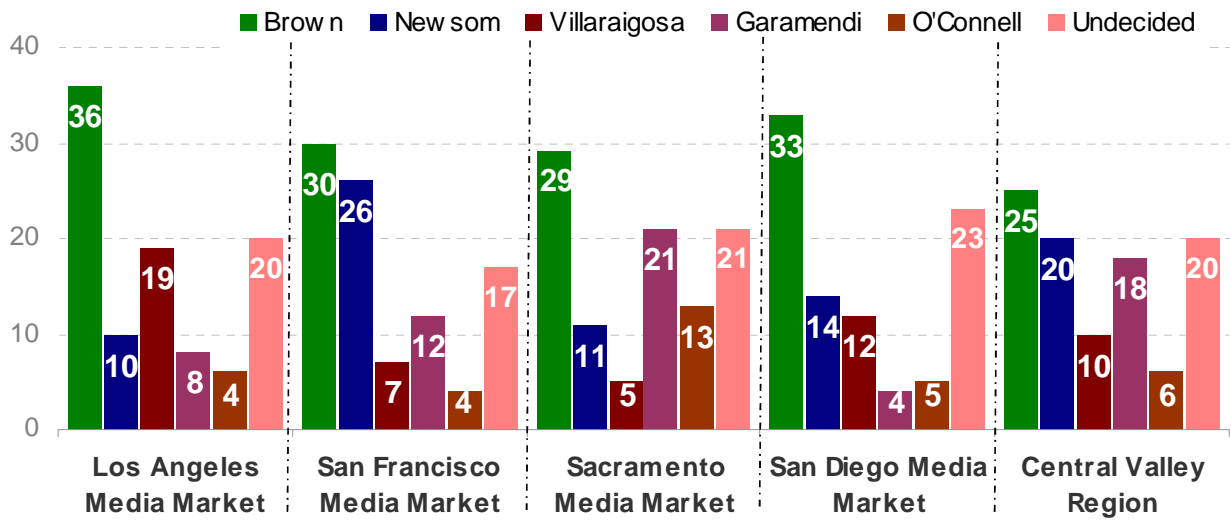
Democratic Primary Governor's Race

I would like to ask you about the June 2010 primary election for Governor. I know it's a long time away, but if the primary election were held today and the Democratic candidates were: Attorney General Jerry Brown, Lieutenant Governor John Garamendi, San Francisco Mayor Gavin Newsom, Los Angeles Mayor Antonio Villaraigosa, and California Superintendent of Public Instruction Jack O'Connell, for whom would you vote?



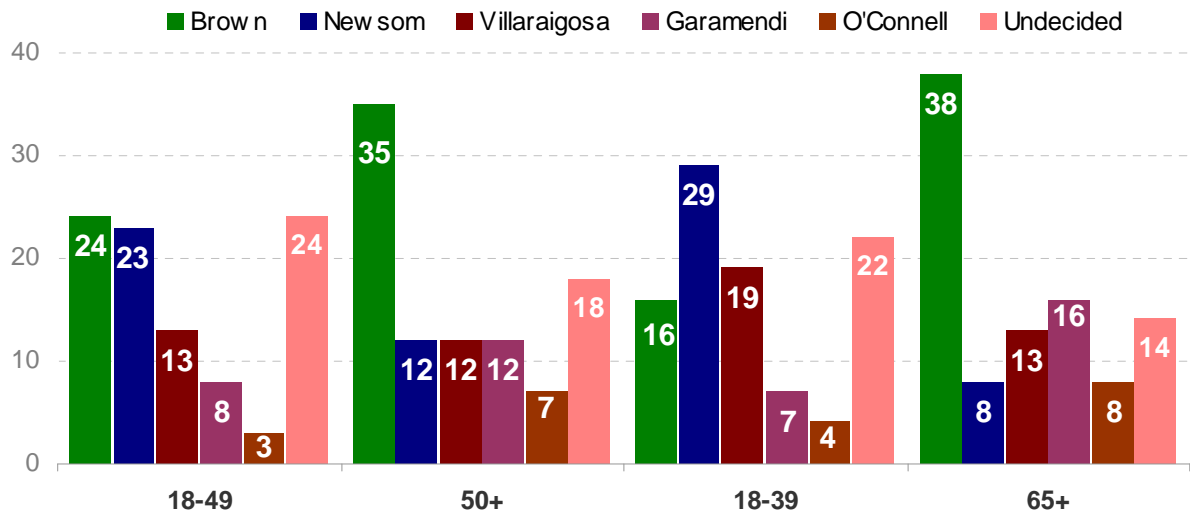
Slide 1

Governor Vote by Media Market and Region



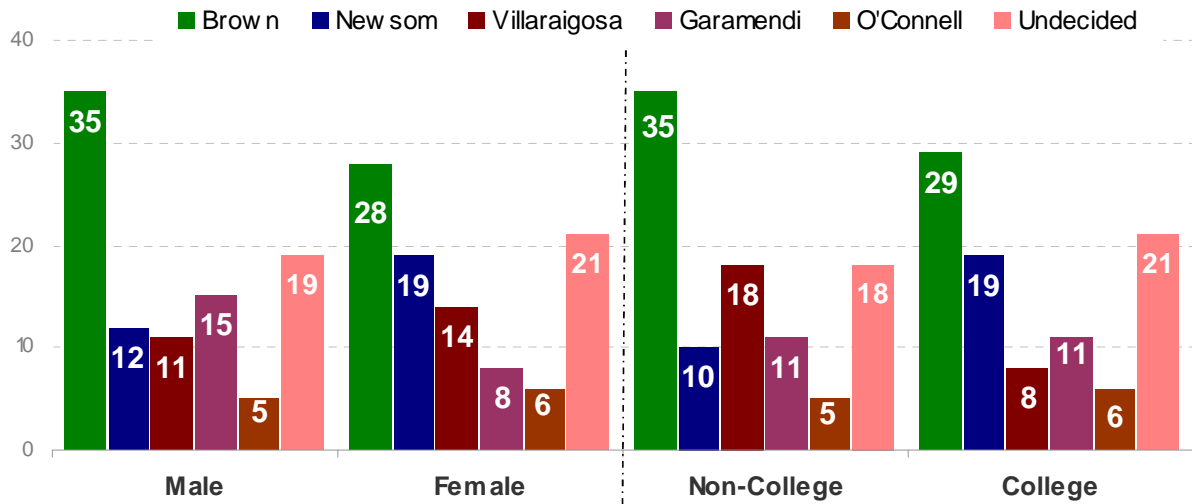
Slide 2

Governor Vote by Age



Slide 3

Governor Vote by Gender and Education



Slide 4