



Memo

To: Interested Parties

Fr: Simon Rosenberg and Chris Murphy

Dt: Friday, November 4, 2016

Re: 2016 Through A Millennial Lens – Some Initial Thoughts

One of the more dramatic and potentially disruptive demographic developments in recent American politics has been the explosion of Millennials into the American electorate. In terms of voting age population, Millennials now equal the other large American generation, the Boomers. 70m Millennials will be voting age in 2016, 20m more than 2012 and 35m more than 2008.

We've already seen the impact a big demographic change can bring to American politics. In 2004, George W. Bush won the 6 states in what we call the "Latin Belt" – AZ, CO, FL, NM, NV and TX. Today, due to rising numbers of Hispanic voters in these states, higher levels of turnout and an embrace of the Democrats, Clinton is likely to win 5 of these 6 states. Coming a few years later than a big transformation of formerly Red California, several polls of late have Texas within margin of error. Democratic gains in these heavily Hispanic states have changed the electoral map.

The same will be true for Millennials. But as they've been voting about 2 to 1 for Democrats it would make sense for us to begin to see disruption inside the Democratic Party first – something we did see in the Presidential primary this year with Bernie Sanders. What impact is this big Millennial surge having on the general election? We won't know until after November 8th, but we offer some initial thoughts below. For the purposes of this analysis, we broke down each state by share of Millennial population, and ranked them. You can find that breakdown with an explanation of the methodology we used at the end of this document.

Top States by Millennial %

Ranking	State	2016 Millennial	2018 Millennial
1	District of Columbia	36%	38%
2	North Dakota	29%	32%
3	Alaska	29%	31%
4	Utah	28%	31%
5	Texas	27%	29%
6	Colorado	27%	29%
7	California	26%	29%
8	Hawaii	26%	28%
9	Louisiana	26%	28%
10	Washington	26%	28%

Bottom States by Millennial %

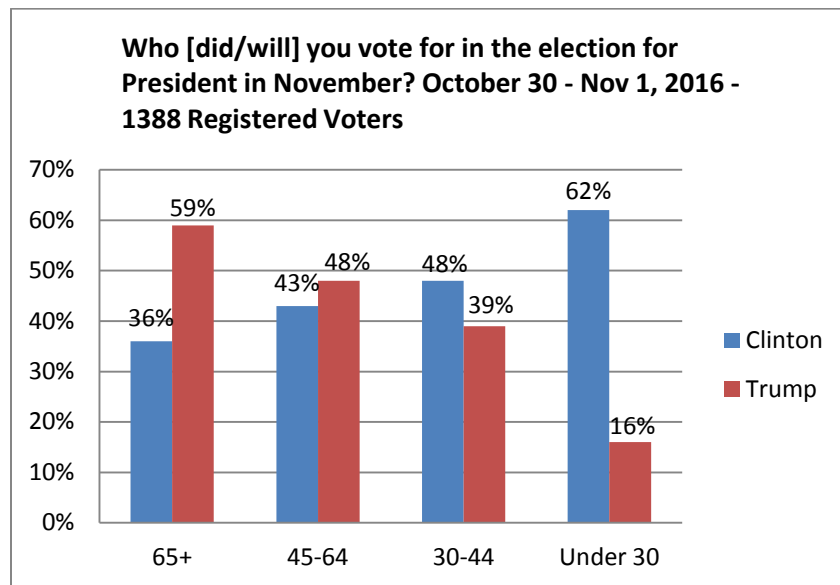
Ranking	State	2016 Millennial	2018 Millennial
40	Michigan	24%	26%
41	Wisconsin	24%	26%
42	Ohio	24%	26%
43	Pennsylvania	24%	26%
44	Montana	23%	26%
45	Connecticut	23%	26%
46	New Jersey	23%	26%
47	Florida	23%	26%
48	Vermont	23%	26%
49	New Hampshire	23%	25%
50	West Virginia	22%	24%
51	Maine	21%	23%

Alaska, Texas, Utah – three traditionally Republican states that appear to be leaning far more towards the Democrats than many anticipated are in the top five states in terms of Millennial share of their population. Alaska is 3rd, Utah 4th, Texas 5th.

A look at the recent [CBS track of Texas](#) which found the race 46% Trump 43% Clinton shows what an impact their Millennial surge is having on the partisan orientation of the state. For comparison we offer the national breakouts from this week's [Economist/YouGov poll](#), which had the national race 46% Clinton 43% Trump. For the record, this poll has the national 18-29 year old Trump a little lower than others. But you get the idea.

Texas/Age	Clinton	Trump	Johnson	Stein	Natl/Age	Clinton	Trump	Johnson	Stein
65+	36	58	0	0	65+	36	59	1	0
45-64	40	54	1	1	45-64	43	48	2	2
30-44	47	39	6	1	30-44	48	39	5	3
18-29	48	27	17	1	18-29	62	16	9	2

We put the Economist demographic breakdowns into a graph, below. It is important to note here that the demographic break that is emerging isn't just with Millennials. Under 45s are now leaning dramatically towards the Democrats (essentially people who came of age after the Cold War ended). The obvious conclusion from this data is that if these rough partisan affiliations hold as more younger people enter the electorate and vote they will make the country and many states far more blue. The first states to be effected will be those with the largest Millennial share – states like the three above.



The Big Battlegrounds – Another interesting trend is recent erosion of Florida and Ohio for Clinton. Both are in the bottom tier of states by Millennial population – Ohio clocking in at 42nd, and Florida 47th. Something Democrats will have to watch going forward is many of the important battlegrounds have below average Millennial percentages. MI is 40th, WI 41st, OH 42nd, PA 43rd, FL 47th, NH 49th, ME 51st (we include DC here as a state). If older people are trending a bit more Republican, these states provide fewer Millennials to make up that lost ground; but even these states are feeling the effect of this flood of new young voters.

The Millennials Are Coming – Since 2008, the country has gained 35m more Millennials of voting age. Assuming a 50% turnout rate and 2 to 1 support for Dems, this is about 6m net new votes for Democrats. As Millennials age and their turnout rates increase, the number of Millennial voters will increase as will their political influence. It is hard to see how today how this isn't anything but an existential threat to the current Republican Party – their nominee is losing under 30s by more than 20 points even in Texas today, and between 25 and 40 points depending on the poll for the nation as a whole.

We will report back in the days after the election to see how this all plays out.



Full Rankings of States by Millennial % (1-51)

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1	District of Columbia	36%	38%
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9	Louisiana	26%	28%
10	Washington	26%	28%
11	New York	26%	28%
12	Massachusetts	25%	28%
13	Georgia	25%	28%
14	Oklahoma	25%	28%
15	Rhode Island	25%	28%
16	Virginia	25%	28%
17	Kansas	25%	28%
18	Nebraska	25%	28%
19	Wyoming	25%	28%
20	Nevada	25%	28%
21	Arizona	25%	28%
22	Illinois	25%	27%
23	Maryland	25%	27%
24	Idaho	24%	27%
25	Indiana	24%	27%
26	Oregon	24%	27%
27	South Dakota	24%	27%
28	New Mexico	24%	27%
29	South Carolina	24%	27%
30	North Carolina	24%	27%
31	Minnesota	24%	27%
32	Missouri	24%	27%
33	Tennessee	24%	27%
34	Iowa	24%	27%
35	Mississippi	24%	27%
36	Delaware	24%	27%
37	Alabama	24%	27%
38	Arkansas	24%	27%
39	Kentucky	24%	26%
40	Michigan	24%	26%
41	Wisconsin	24%	26%
42	Ohio	24%	26%
43	Pennsylvania	24%	26%
44	Montana	23%	26%
45	Connecticut	23%	26%
46	New Jersey	23%	26%
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Note: We have ranked the 50 states and the District of Columbia in descending order by 2016 Millennial percentage. All the raw data is from the 2015 census. The “2016 Percentage” column approximates the # of Millennials 18 and older as a percentage of the total population of each state. It uses the 20-34 totals and takes 60% of the 15-19, given that people aged 17, 18 and 19 could vote in this election. This is an approximation of course, and we acknowledge the actual percentages will be a bit smaller given that not every 2017 year old will be old enough to vote this year, and the populations of most states will have increased.

The “2018 Millennial column” looks at the percentage of Millennials per state assuming all 2015 15-19 year olds would be old enough to vote. Like in the first formula, this is construction is an approximation. Things will no doubt change in all these state between 2015 and 2018, but these are still apples to apples comparisons.

We would like to acknowledge we leaned heavily on data from the Pew Hispanic Center, the Pew Research Center, and the US Census Bureau for the data used in this analysis.