

The Elephant Looks in the Mirror 10 Years Later



A Critical Look at
Today's Grand
Old Party

Methodology



- This survey of 2,000 self-described Republican voters was conducted both via telephone and online between May 28th and June 3rd, 2007.
- 1,000 surveys were conducted via telephone by professionally trained interviewers using computer-assisted interviewing technology (CATI). Interview selection was random within predetermined geographic units to correlate with GOP voter turnout based on the 2004 Presidential election
- 1,000 surveys were completed online through a web survey host portal. Respondents were randomly solicited from a national panel of tens of millions of potential respondents who indicate their willingness to participate in online research. Respondents were screened to party affiliation and geographic requirements based on 2004 GOP voter turnout.
- Overall data was weighted to reflect actual online usage.
- This survey of 2,000 respondents has a margin of error of +/- 2.2% at the 95% confidence interval.

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Study Sponsorship



- A decade ago, Fabrizio, McLaughlin and Associates (FMA) released its groundbreaking study entitled “The Elephant Looks in the Mirror.” The study took a critical look at the core beliefs of the GOP and broke the party down into issue and principle based segments. That study became a roadmap for many in the Party and Media in understanding the rank and file GOP.
- Now FMA has again conducted a national study of GOP voters to take a fresh look at the GOP and where it stands 10 years later - what is the same, what has changed and what is new.
- Conducting a national study of this magnitude is a significantly expensive and time consuming undertaking and while FMA is fully invested in this study, it could not have done it without outside help.
- FMA was extremely fortunate to come across fellow Republicans who were willing to step back, put their faith in our formula and blindly underwrite a portion of this study to get a unique look at the state of the GOP today.
- FMA thanks these GOP organizations -- the Republican Leadership Council, Republican Main Street Partnership, Republican Majority for Choice and the Log Cabin Republicans for their willingness to underwrite a portion of this study to gain a greater understanding of today’s GOP.

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Purpose of Study



- Where does the GOP stand 10 years later?
- What are the dominant issue segments of the GOP?
- How do they compare to the 1997 Study?
- What are the core beliefs that unify the GOP?
- What are the issues that divide the GOP?
- What does today's GOP look like?
- How is the 2008 Presidential campaign shaping up?

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Focus of Presentation



- Comparison of key 1997 and 2007 demographic data
- Refresher on GOP segmentation circa 1997
- Today's GOP segmentation
- Current face of GOP
- Issues that Unify
- Issues that Divide
- 2008 Nomination

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Key Demographic Comparisons -1997 and 2007

Key Comparison Points

- More GOPers describe themselves as conservatives
- GOP ranks have gotten somewhat older
- Other demographics remain similar

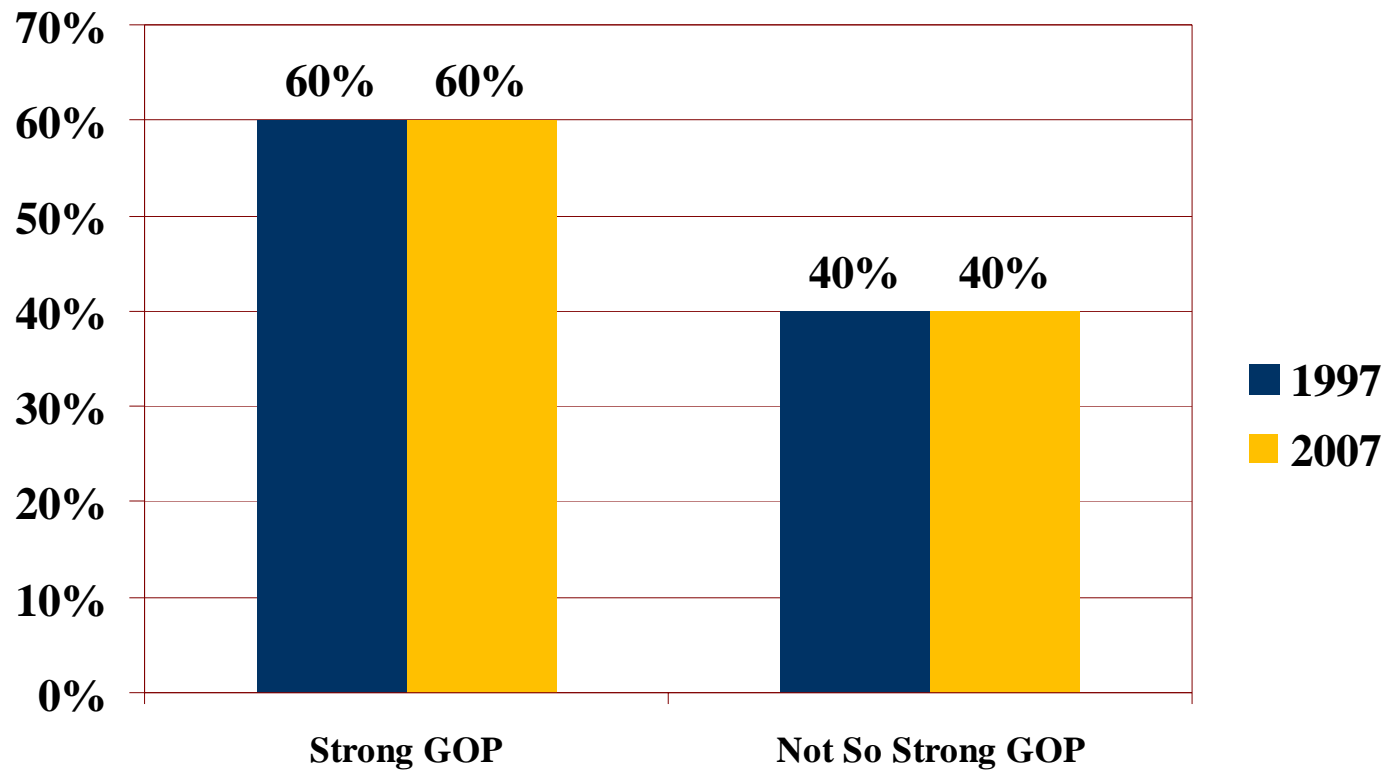
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Comparisons

Strong or Not Strong GOP



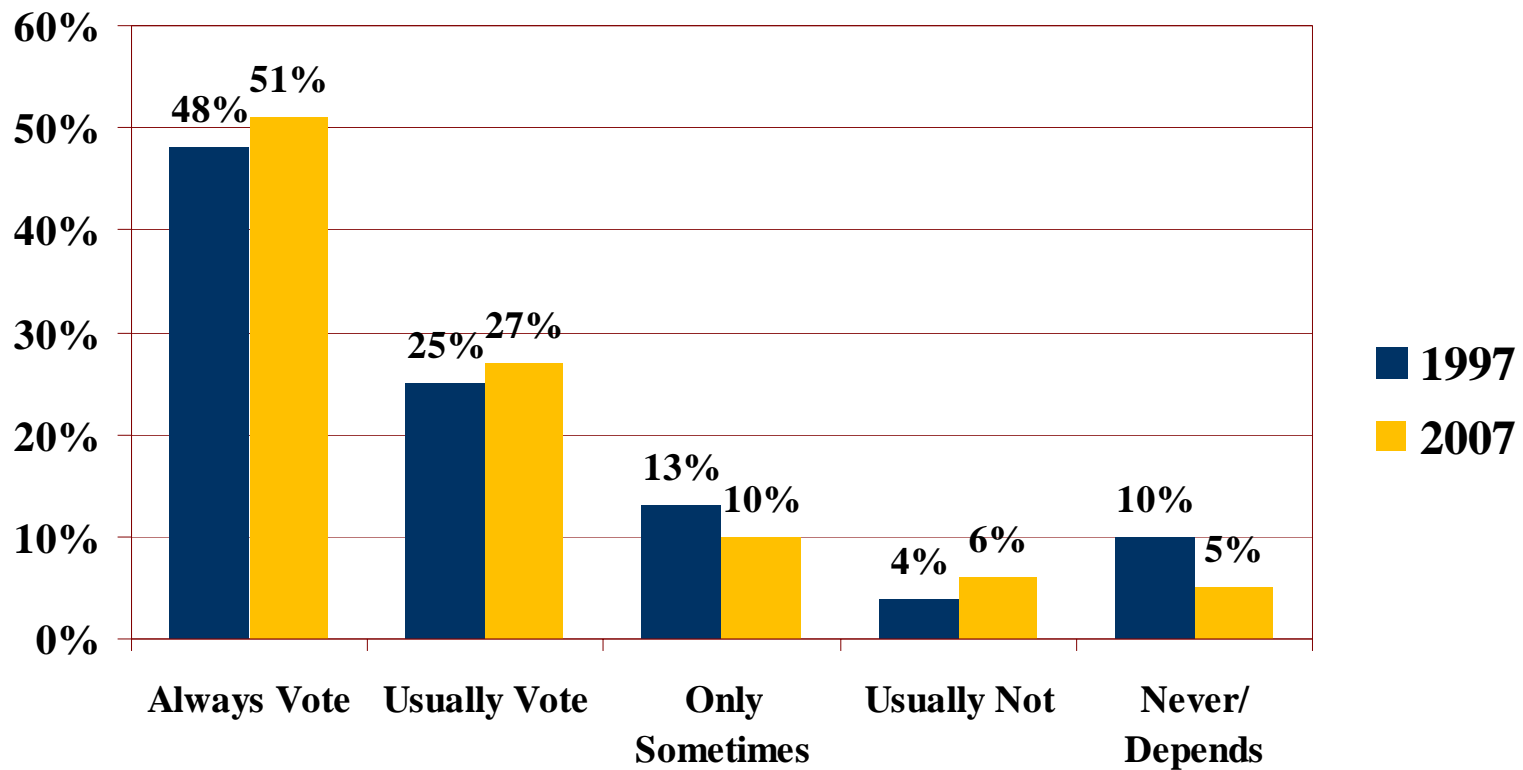
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Comparisons

Primary Vote Behavior



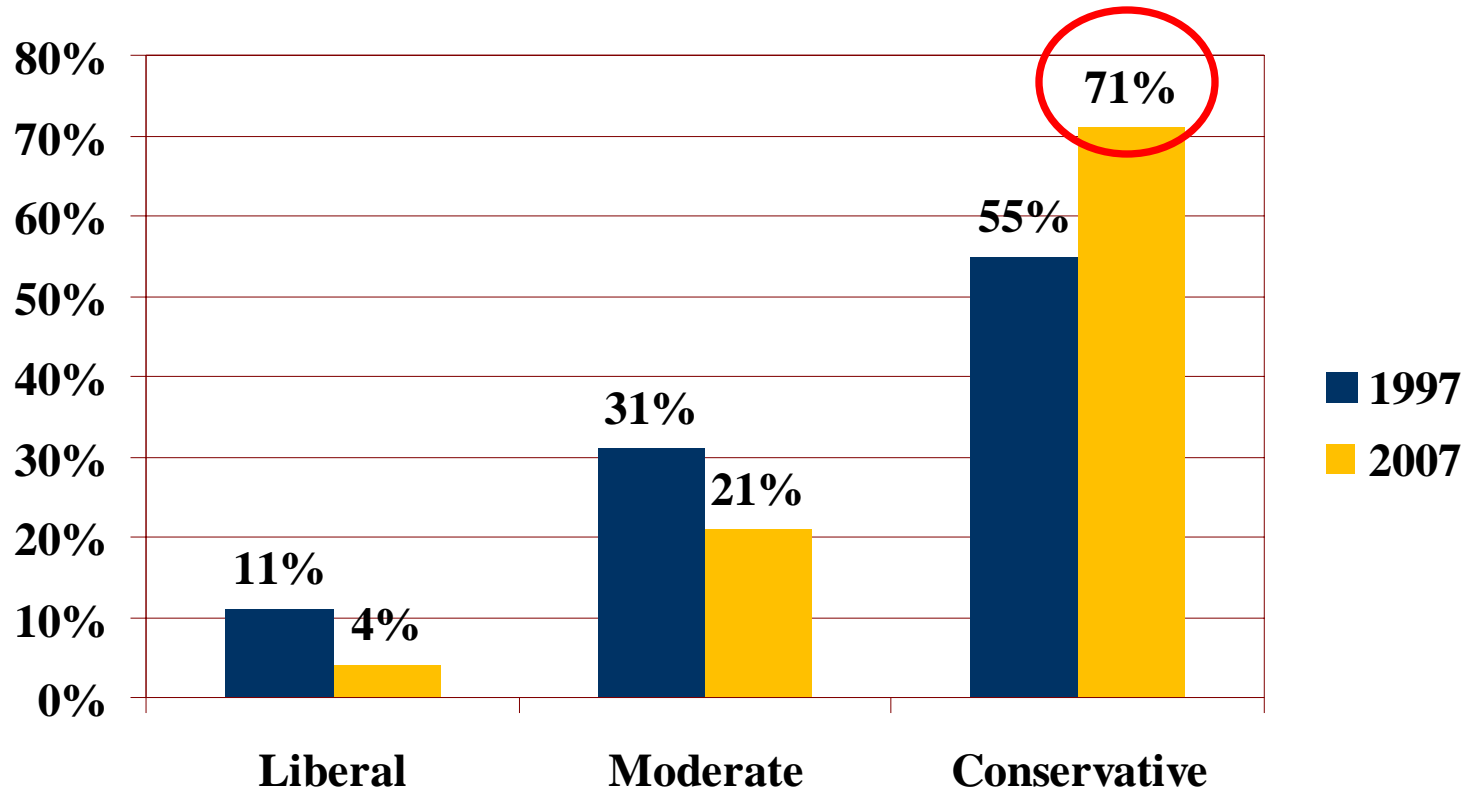
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Comparisons

Self-Described Ideology



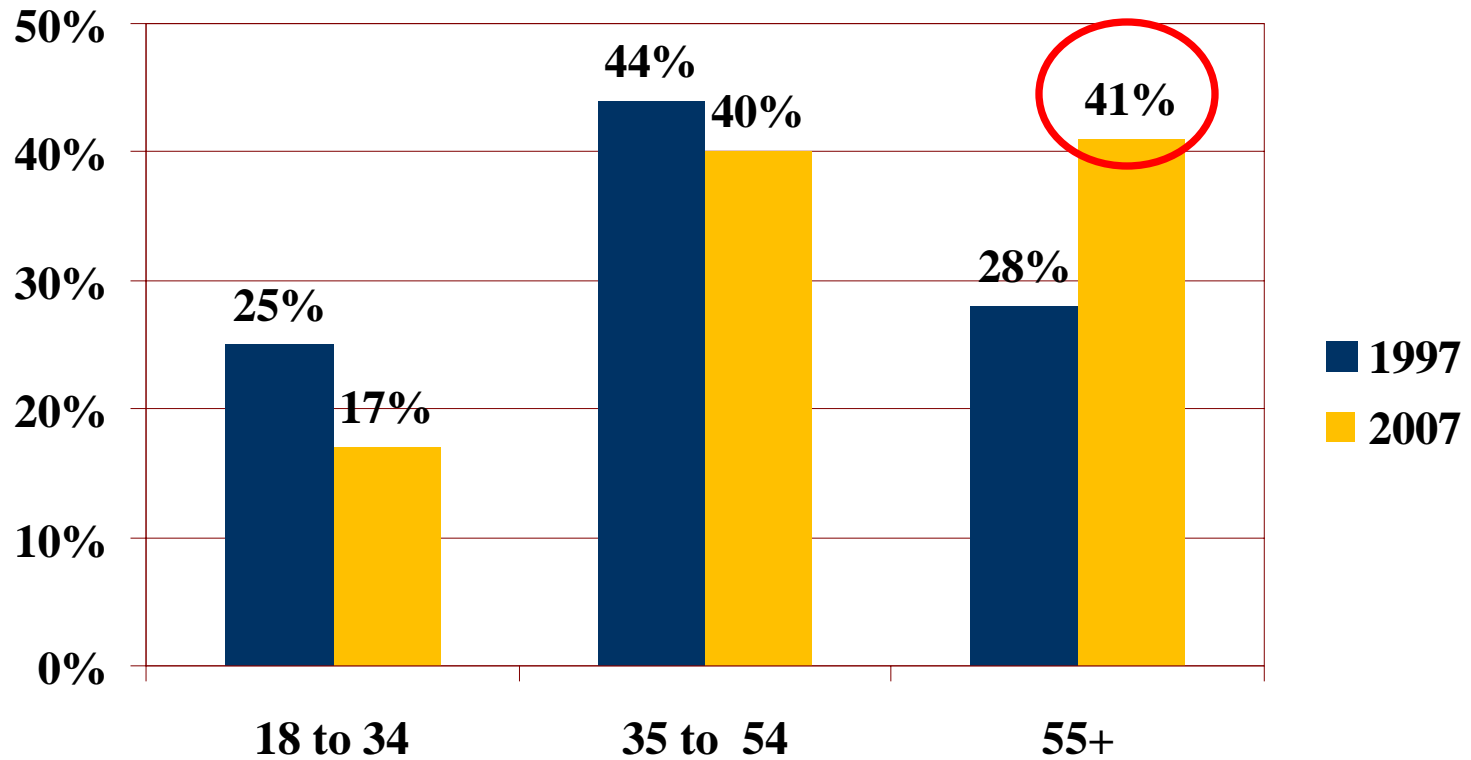
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Age



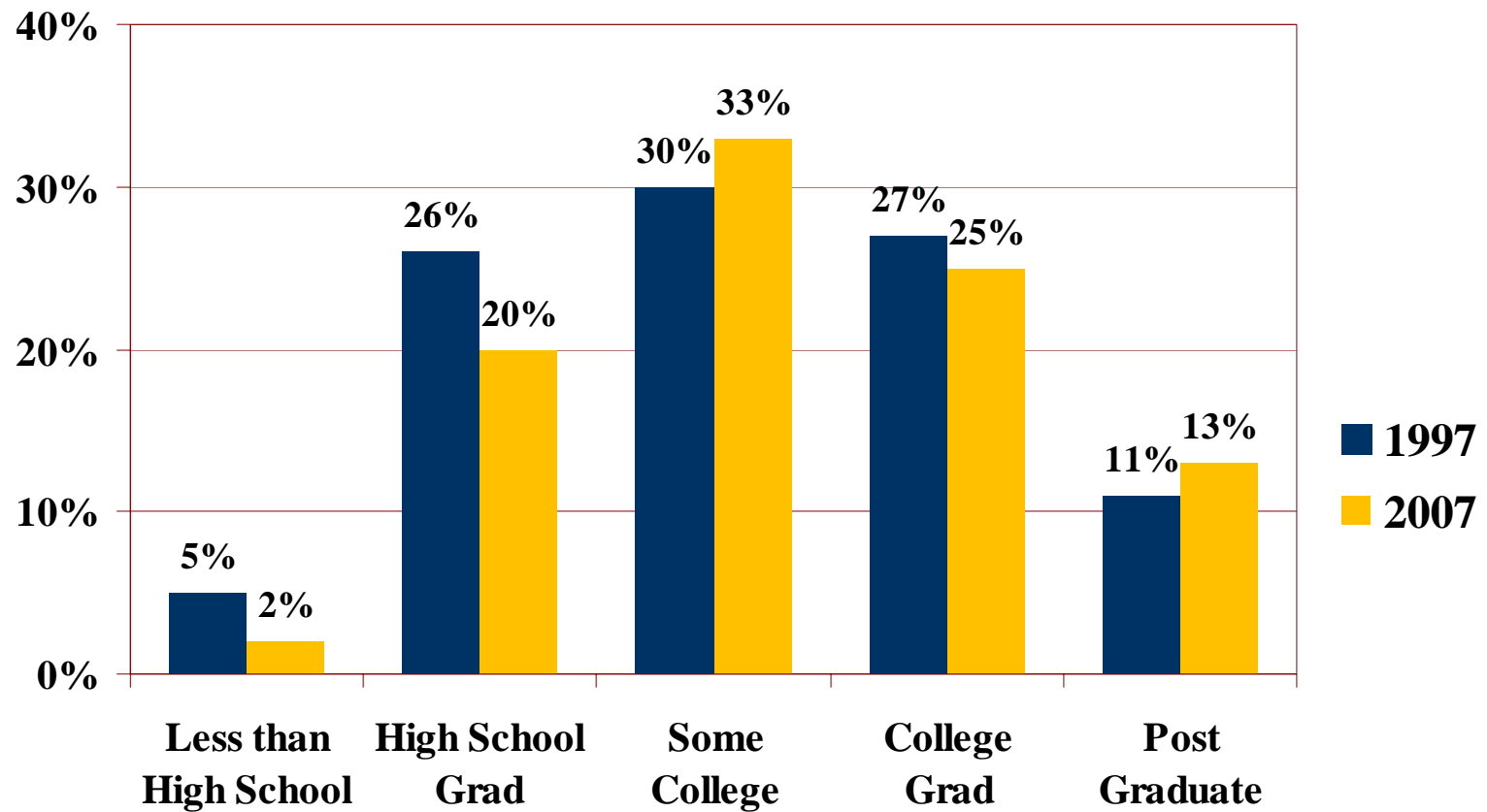
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Comparisons

Education



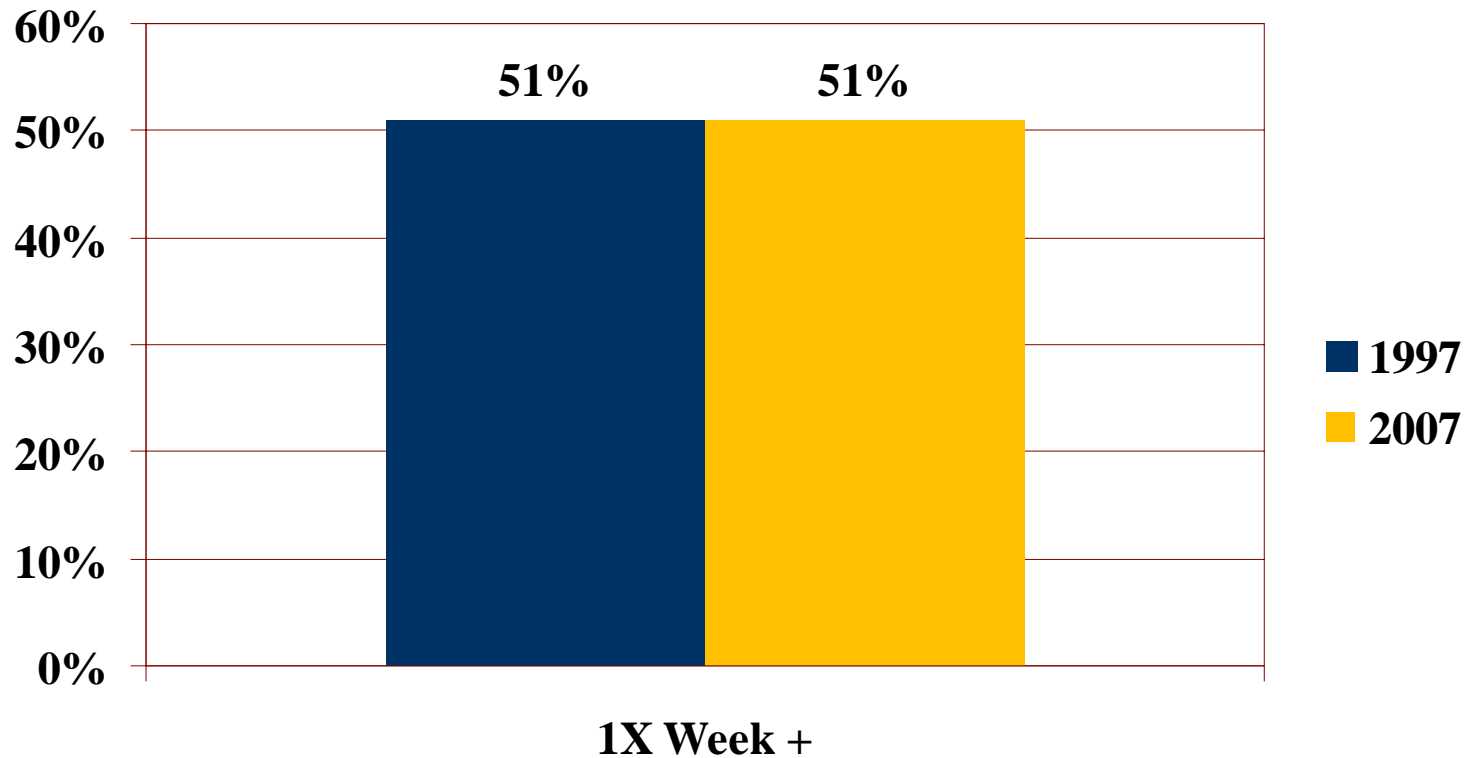
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Comparisons

Church Attendance



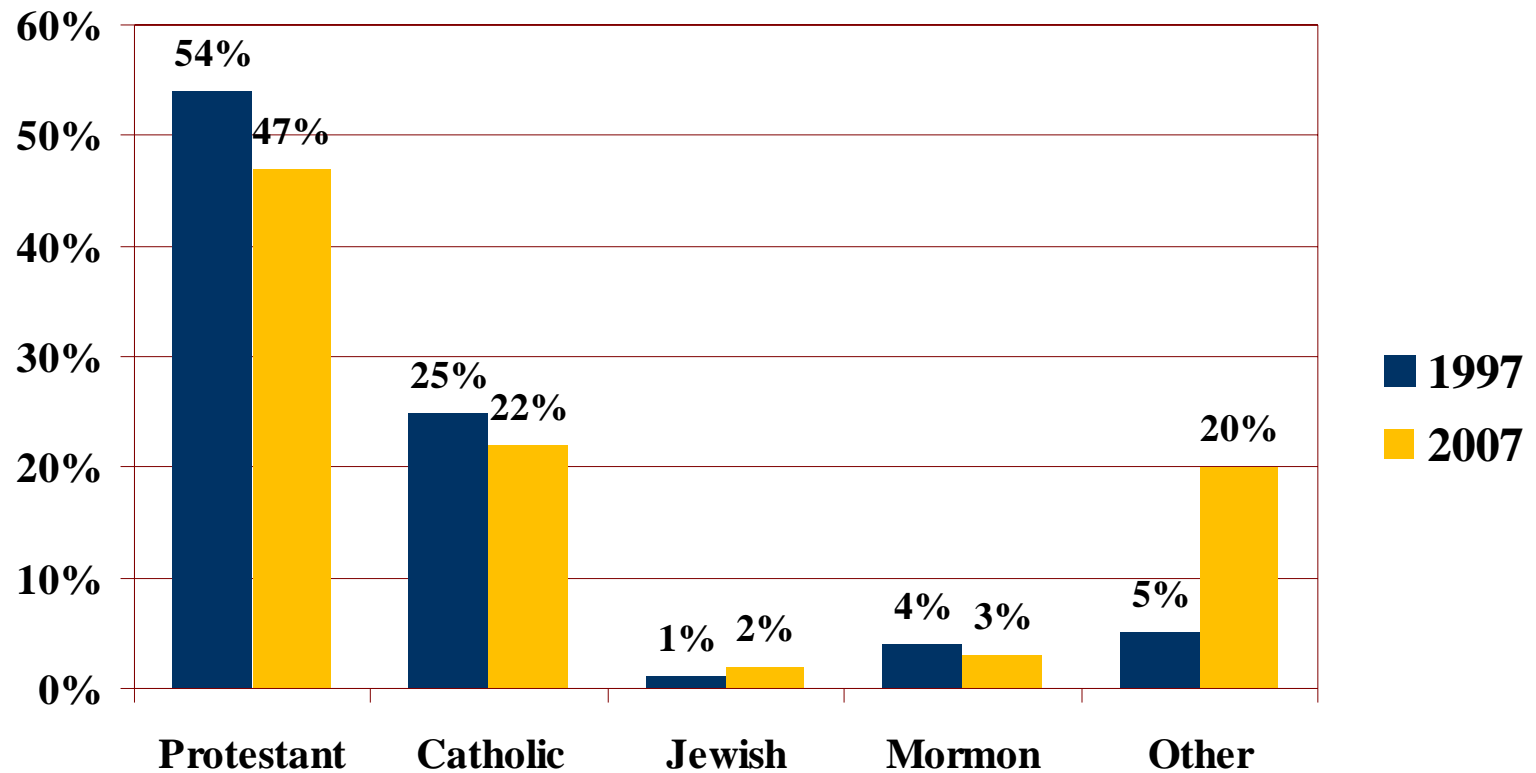
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Comparisons

Religious Affiliation



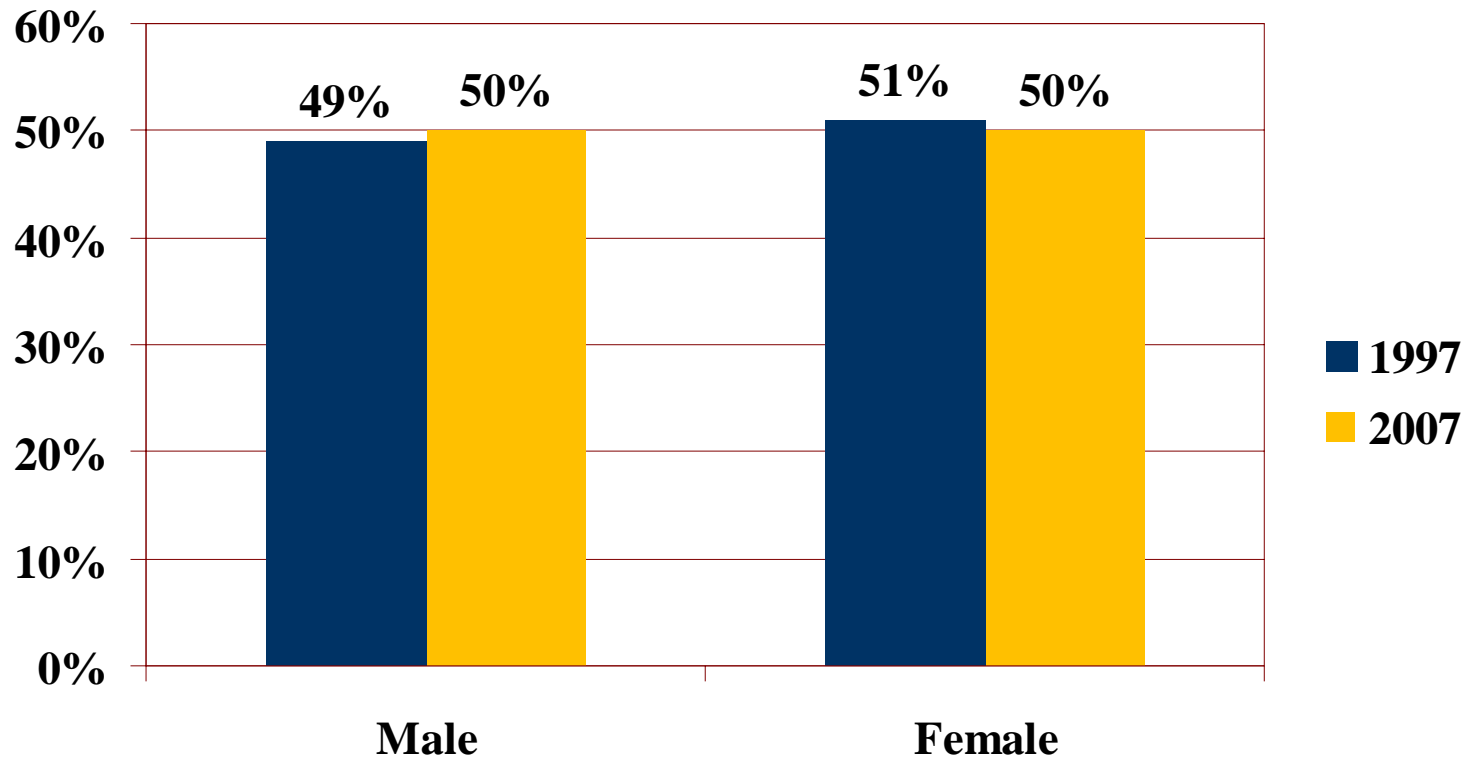
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Comparisons

Gender



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1997 and 2007 Segments of the GOP

How We Segmented



- Very similar process to 1997
- Based on **PRIMARY** issue concern
 - Respondents have multiple opportunities to choose top issue
- Utilize **SPECIFIC** issue questions within general issue concern area
 - Economic issues on economic issues
 - Foreign policy issues on foreign policy issues
 - Moral issues on moral issues
 - Social issues on social issues
- Questions designed to polarize

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Segments



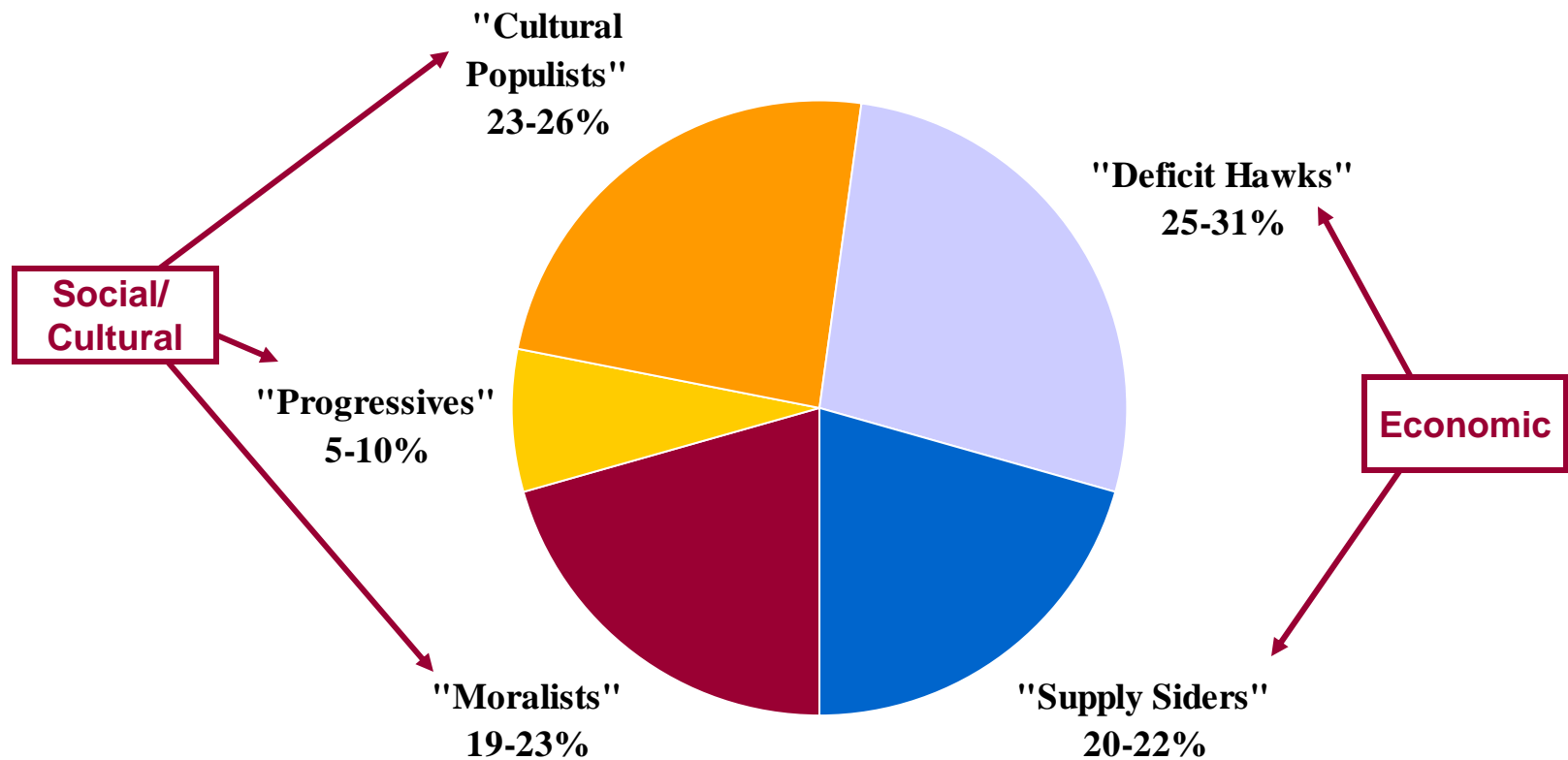
- In 1997, Party had 5 distinct segments
 - Party split along Economic and Social/Cultural lines
 - Almost evenly split between the two
- Today, Party has 7 distinct segments
 - Party split along Economic, Social/Cultural AND National Security Issues
 - While Social/Cultural wing remains roughly same size, Economic wing has shrunk by nearly two-thirds
 - Foreign Policy and National Security while just a blip in 1997, now comprise more than one-quarter of GOP

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Five Segments of the GOP in 1997

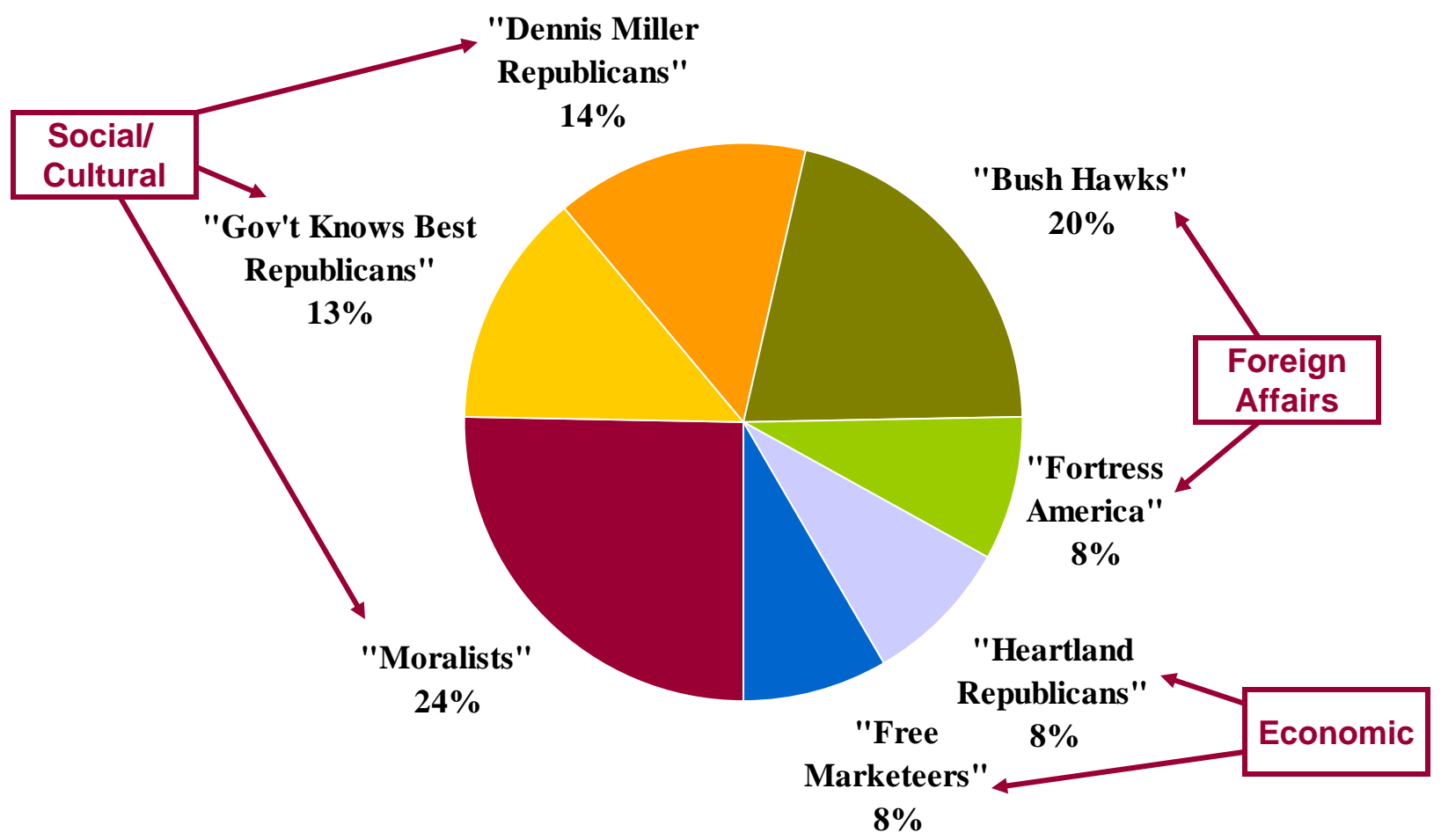


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Seven Segments of the GOP in 2007



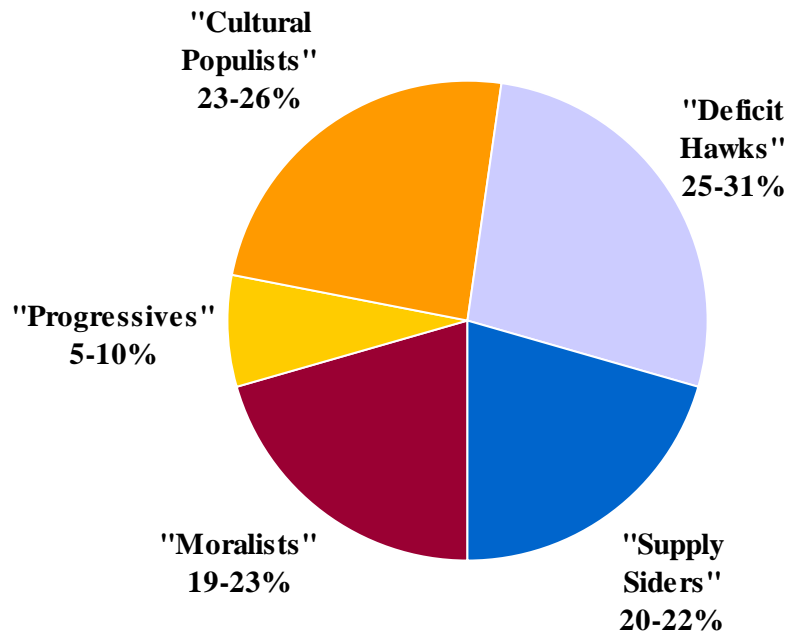
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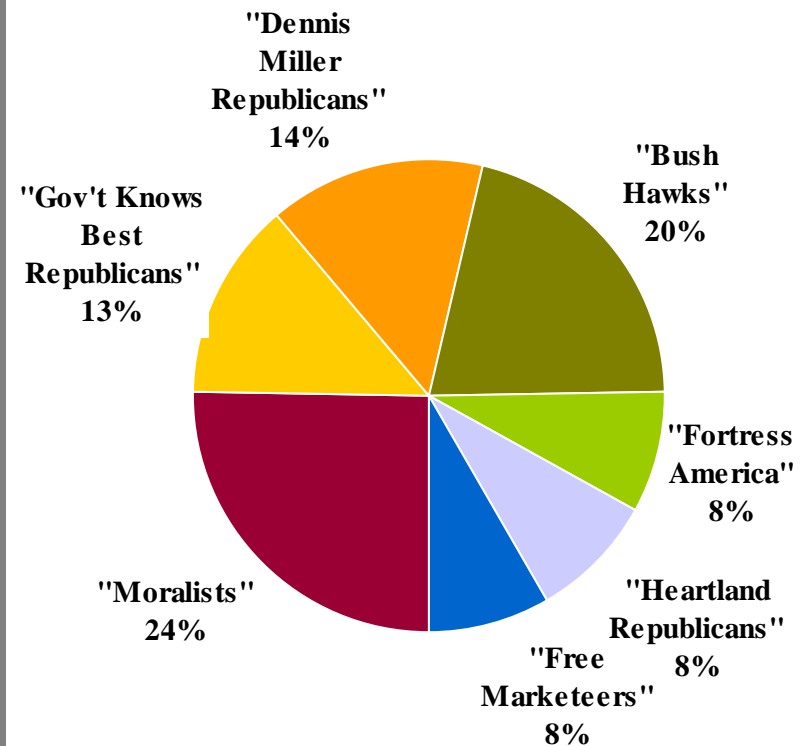
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Segment Comparison GOP in 1997 vs. 2007

1997



2007



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“Free Marketeers”

Segment Profile



- Constitute 8% of GOP
- Focused on economic issues
- Skeptical of government action, they want tighter reigns on spending and lower taxes
- Disproportionately Male
- Disproportionately Baby Boomers
- Less frequent church goers
- More libertarian -- counterbalance to “Moralists”
- Share many policy perspectives with “Dennis Miller GOP”
- Fred Thompson’s strongest group

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“Heartland Republicans”

Segment Profile



- Constitute 8% of GOP
- Focused on economic issues
- Similar to “Gov’t Knows Best GOP” on many policies
- More likely to be life-long GOPers
- More pragmatic and less ideological
- Concerned with gas prices & economic growth
- Not opposed to more government spending & regulation, and action on environment
- Strong McCain group
- Less frequent church goers – less focus on Moral issues
- More likely found in Midwest

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“Bush Hawks”

Segment Profile



- Constitute 20% of GOP
- Focused on foreign policy and national security issues
- Bush’s most ardent supporters, only group with majority ‘right direction’
- Focused on national security issues – especially War on Terror - and want to see America using its might spreading democracy
- Support the war and are in it to win it, no timeline
- Significant minority are new to party
- Disproportionately male

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“Fortress America Republicans”

Segment Profile



- Constitute 8% of GOP
- Focused on foreign policy and national security issues
- Concerned about the war and focused on national security issues, want to see an orderly end to war in Iraq
- Strong Isolationist streak runs through this group
- See government’s top job as protecting the homeland
- Bush’s weakest group
- Disproportionately Baby Boomers
- Nearly 1 in 2 from the South

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“Dennis Miller Republicans”

Segment Profile



- Constitute 14% of GOP
- Focused on social issues
- Focused on illegal immigration, they strongly oppose people gaming the system to get a “free lunch”
- Like “Hawks” they oppose timelines for the war
- Like “Free Marketeers” they oppose expanded government to solve problems
- More likely to be male
- Disproportionately found in the South and West
- They are more likely to be gun owners

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“Government Knows Best Republicans”

Segment Profile



- Constitute 13% of GOP
- Focused on social issues
- More likely to be life-long GOPers
- Strong group for McCain
- Strongest supporters of government intervention to solve social and environmental problems
- Skeptical of the Patriot Act, many would like to see less defense spending
- More likely to be retired or homemaker, lowest income and fewest number of college graduates
- Disproportionately female- nearly 2 to 1
- More likely to be found on the coasts

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“Moralists”

Segment Profile



- Constitute 24% of GOP
- Laser-like focus on moral issues
- Identify as “strong” GOP and “very” conservative, they are strong Bush group
- Rudy’s weakest group
- Only group where majorities are Born Again/Evangelical and go to church at least weekly
- Lower income than Party average
- Disproportionately female and have highest share of Homemakers

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Face of the GOP



Key Points



- 1 in 3 GOPers are converts – nearly 1 in 4 were once Democrats
- Conservatism, principles and values are why most think of themselves as GOPers
- More than a third say Party defined by War in Iraq – not necessarily a negative
- Despite President's popularity, overwhelming majority would choose a Reagan-like candidate
- Most look to a candidate's issue positions, especially Moralists
- Most, except Moralists, agree that Party is too focused on moral issues
- Large majorities, except Moralists, would still vote for a candidate despite disagreeing with him/her on abortion issue

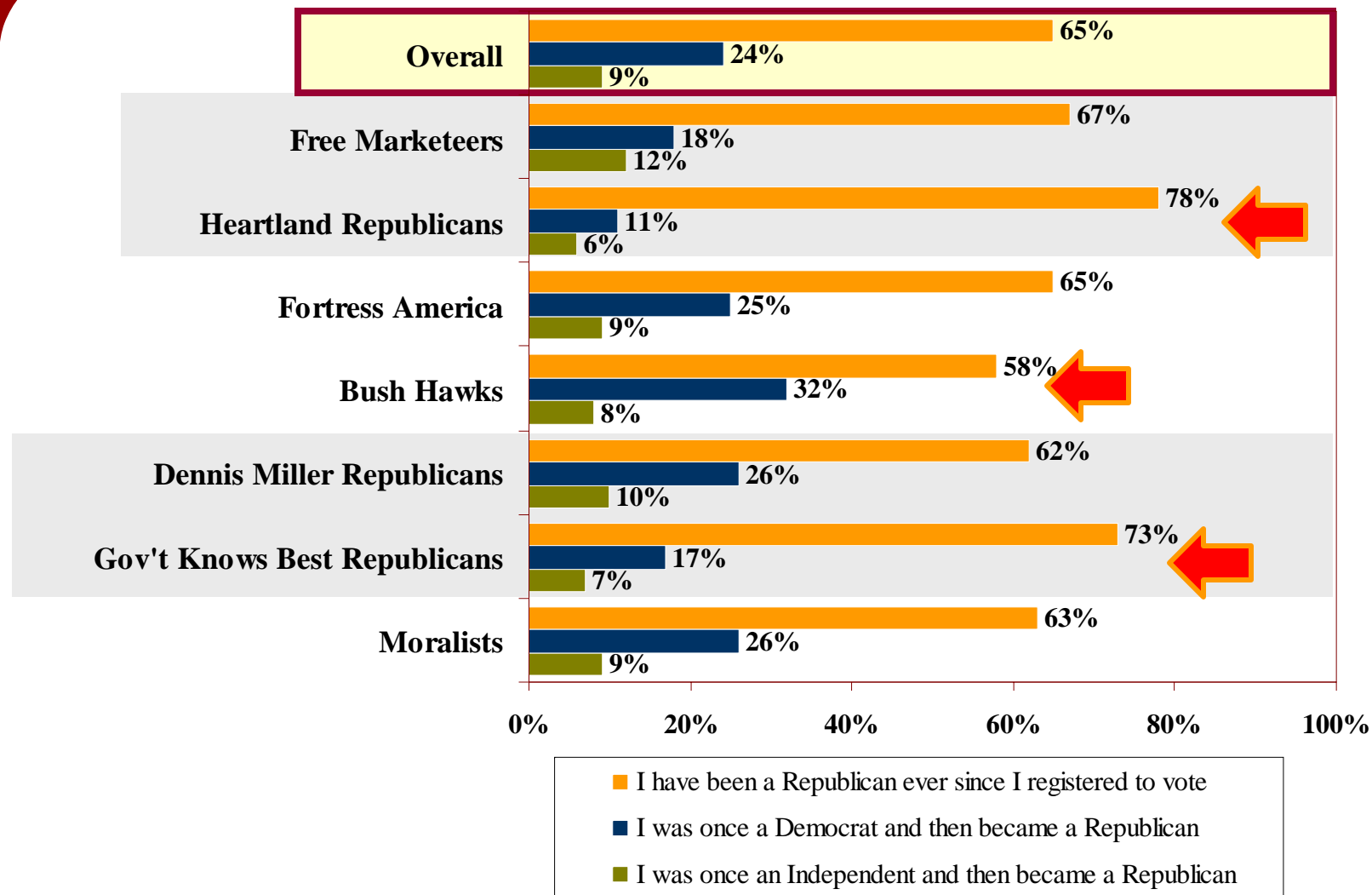
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How Long Have You Been a Republican?

Which of the following statements BEST describes you and your political affiliation?



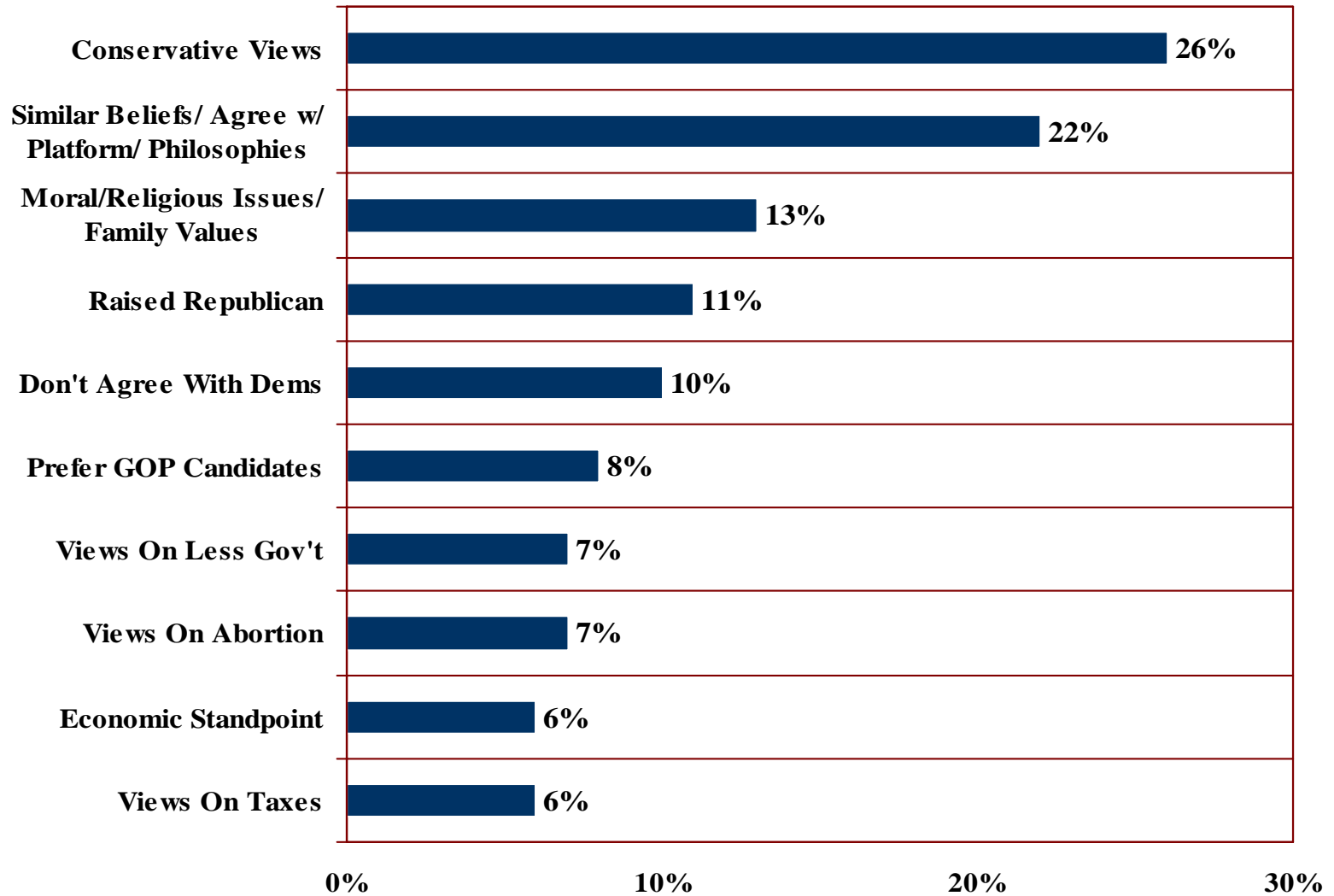
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Reasons for Being a Republican? All Voters

What is the PRIMARY reason why you think of yourself as a Republican?



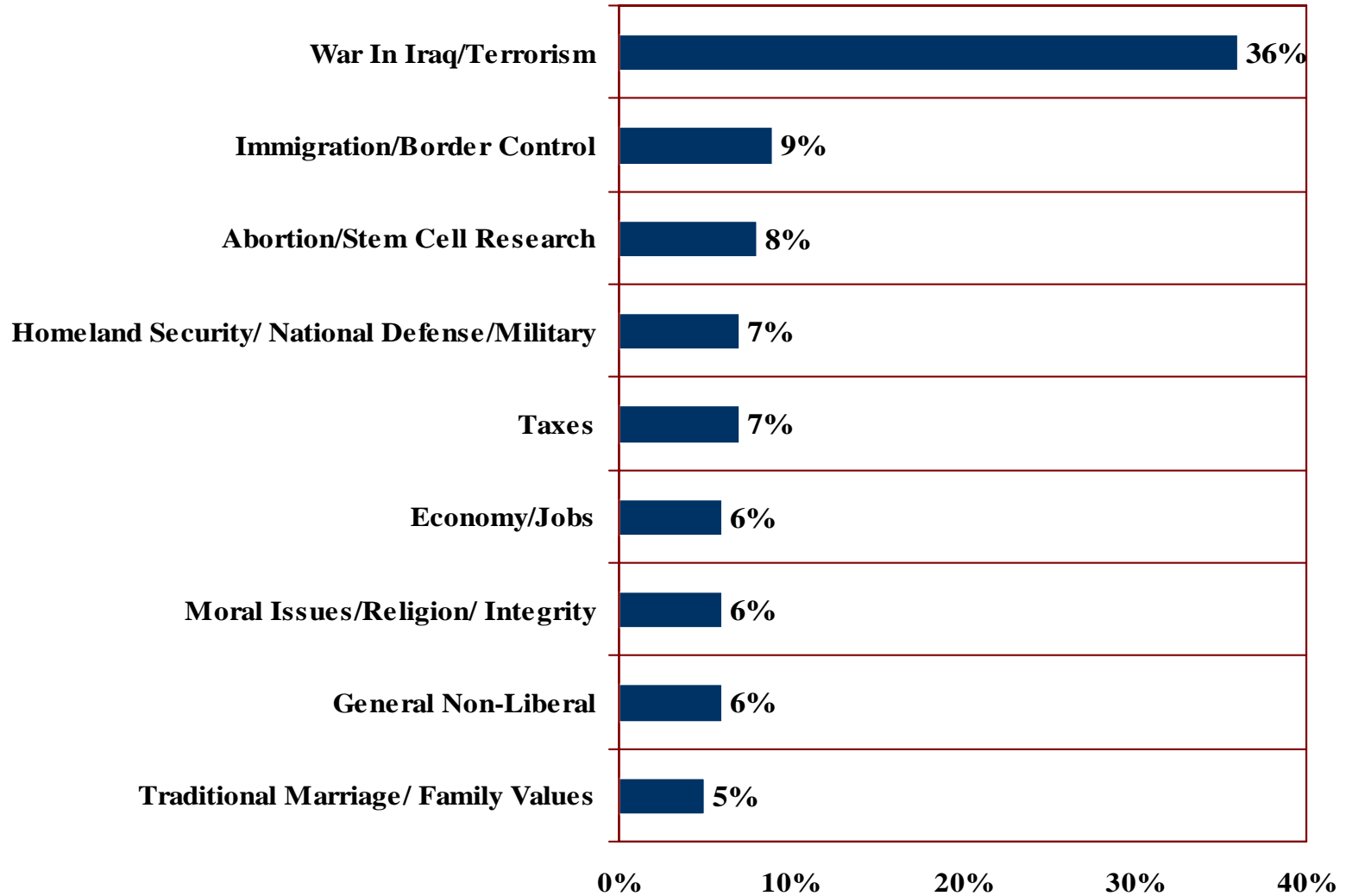
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Issue that Defines the GOP Today? All Voters

In your opinion, what ISSUE do you think BEST defines the Republican Party TODAY?



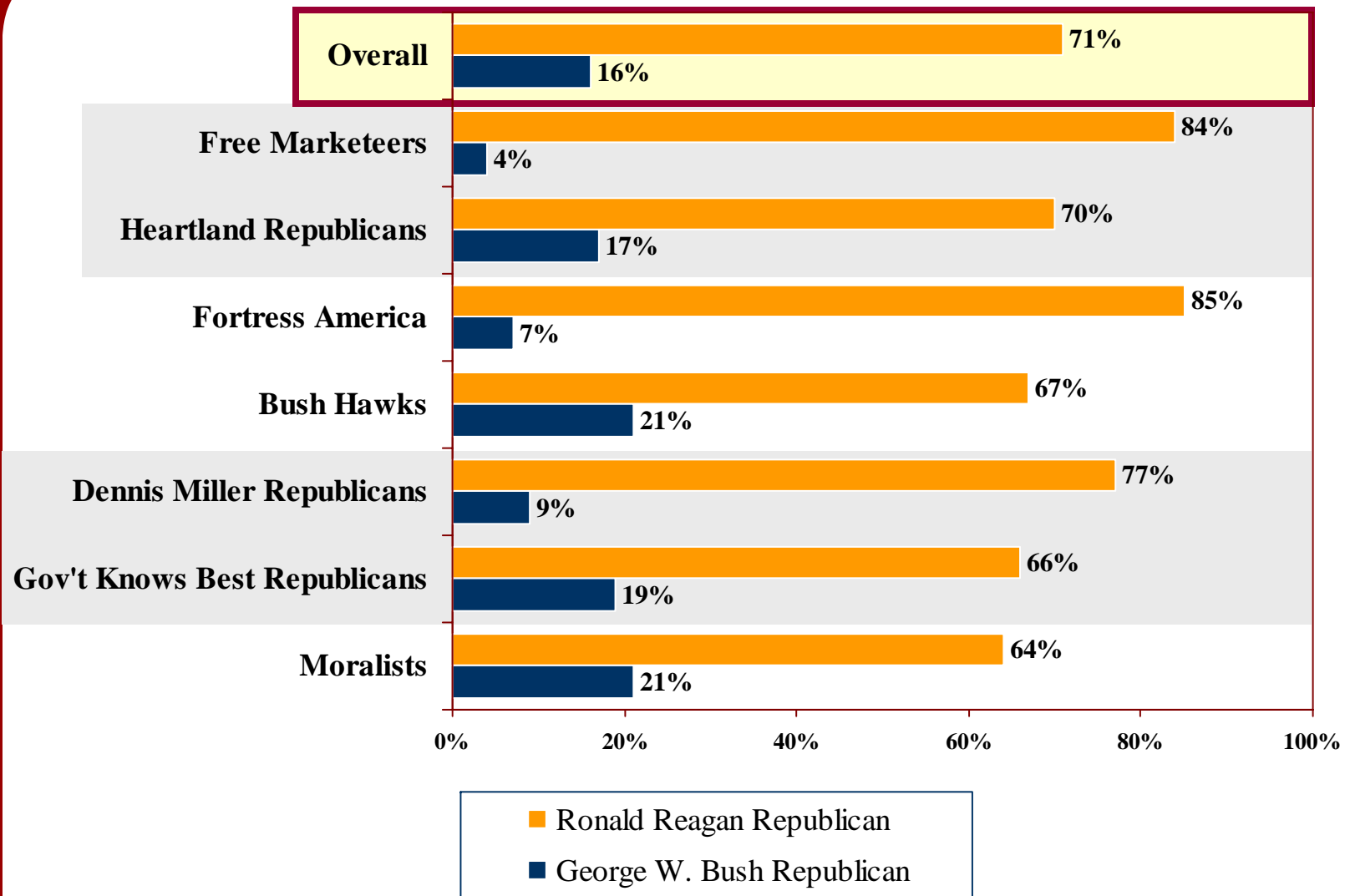
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Reagan or Bush Republican?

All things being equal, who would you be MOST likely to support - a candidate that called themselves a Ronald Reagan Republican or a George W. Bush Republican?



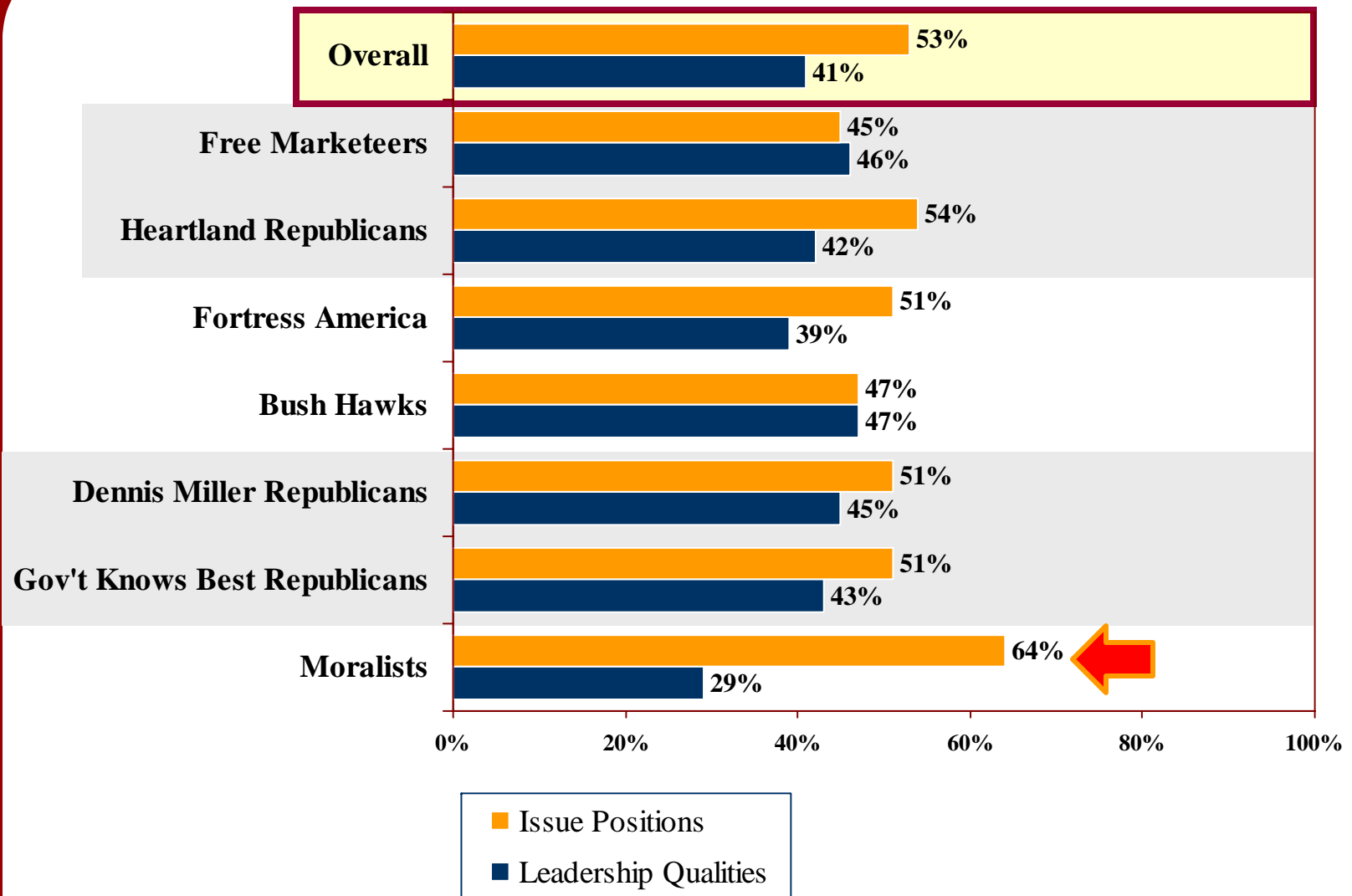
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Most Important - Leadership Qualities or Issue Positions?

All other things being equal, which is MOST important to you in deciding your vote for President a candidate's leadership qualities or a candidate's position on the issues?



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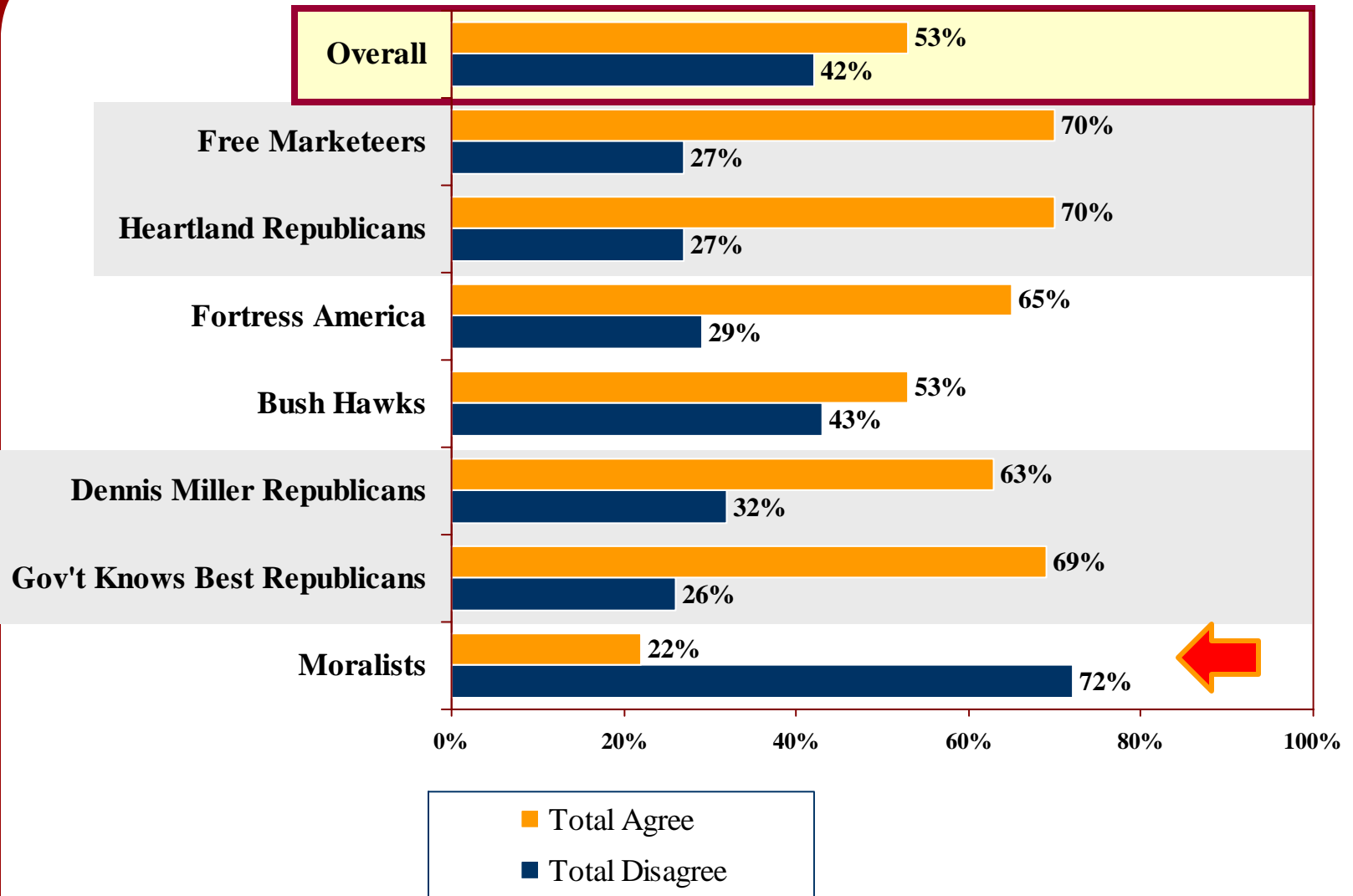
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Focus of Party – Economic or Moral Issues

Please tell me whether you agree or disagree with this statement:

“The Republican Party has spent too much time focusing on moral issues such as abortion and gay marriage and should instead be spending time focusing on economic issues such as taxes and government spending”.



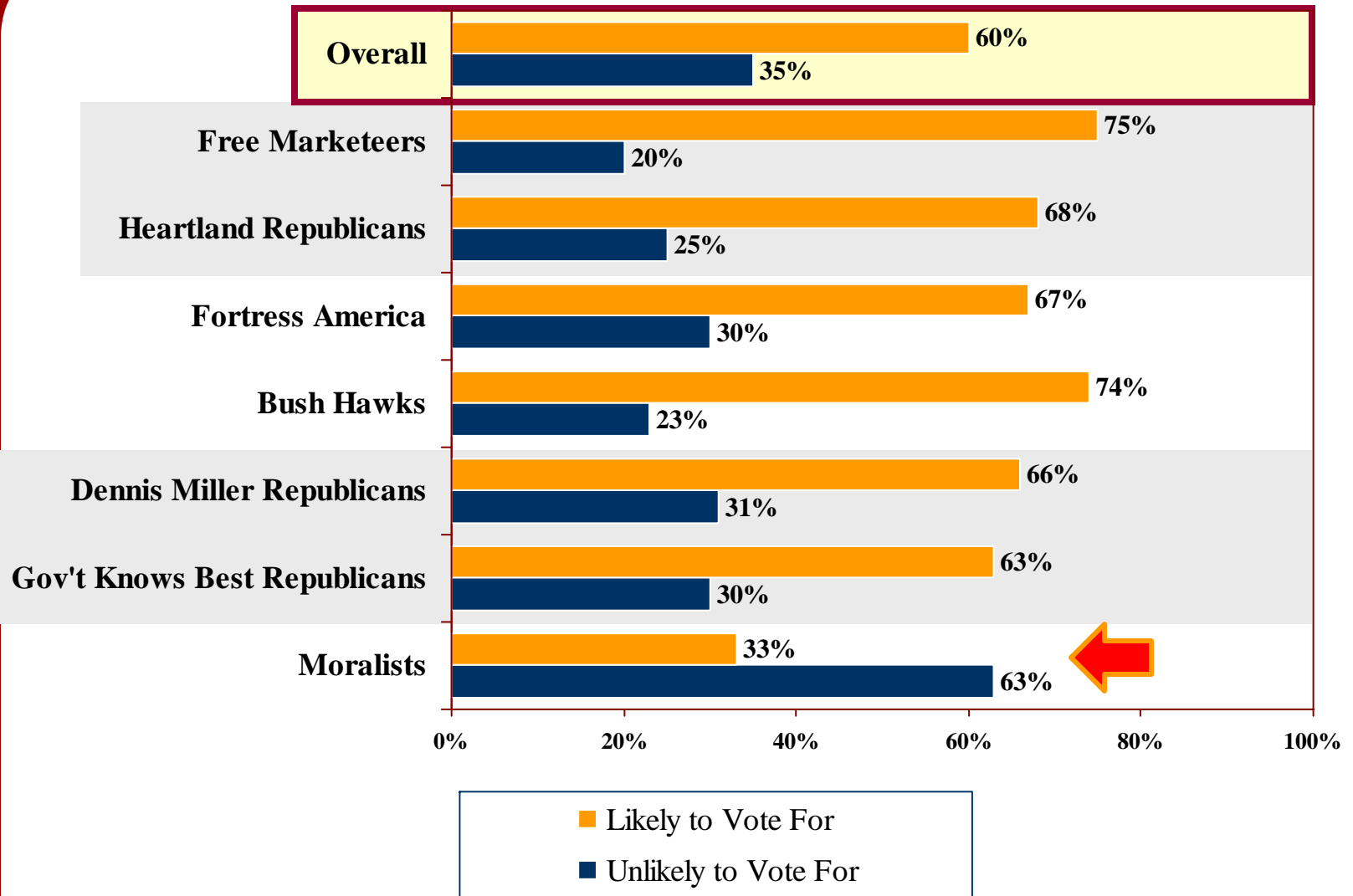
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Impact of Candidate's Abortion Position

How likely would you be to vote for a candidate for President who disagreed with your position on abortion, yet agreed with your positions on a majority of other issues?



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Issues that Unite the GOP



Issues that Unite



- GOP united in:
 - Desire to balance the budget
 - Belief that government spends too much
 - Belief that taxes are too high
 - Belief that federal government is too big and does too many things
 - Belief that current immigrations laws should be followed and no special treatment
 - War in Iraq was the right decision
 - Belief that our Foreign Policy should be based on our own security and economic interests
 - Support of employment non-discrimination

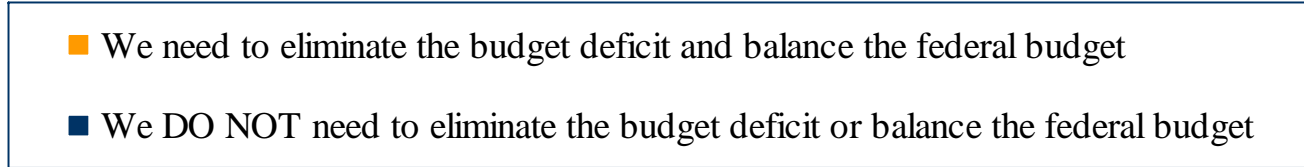
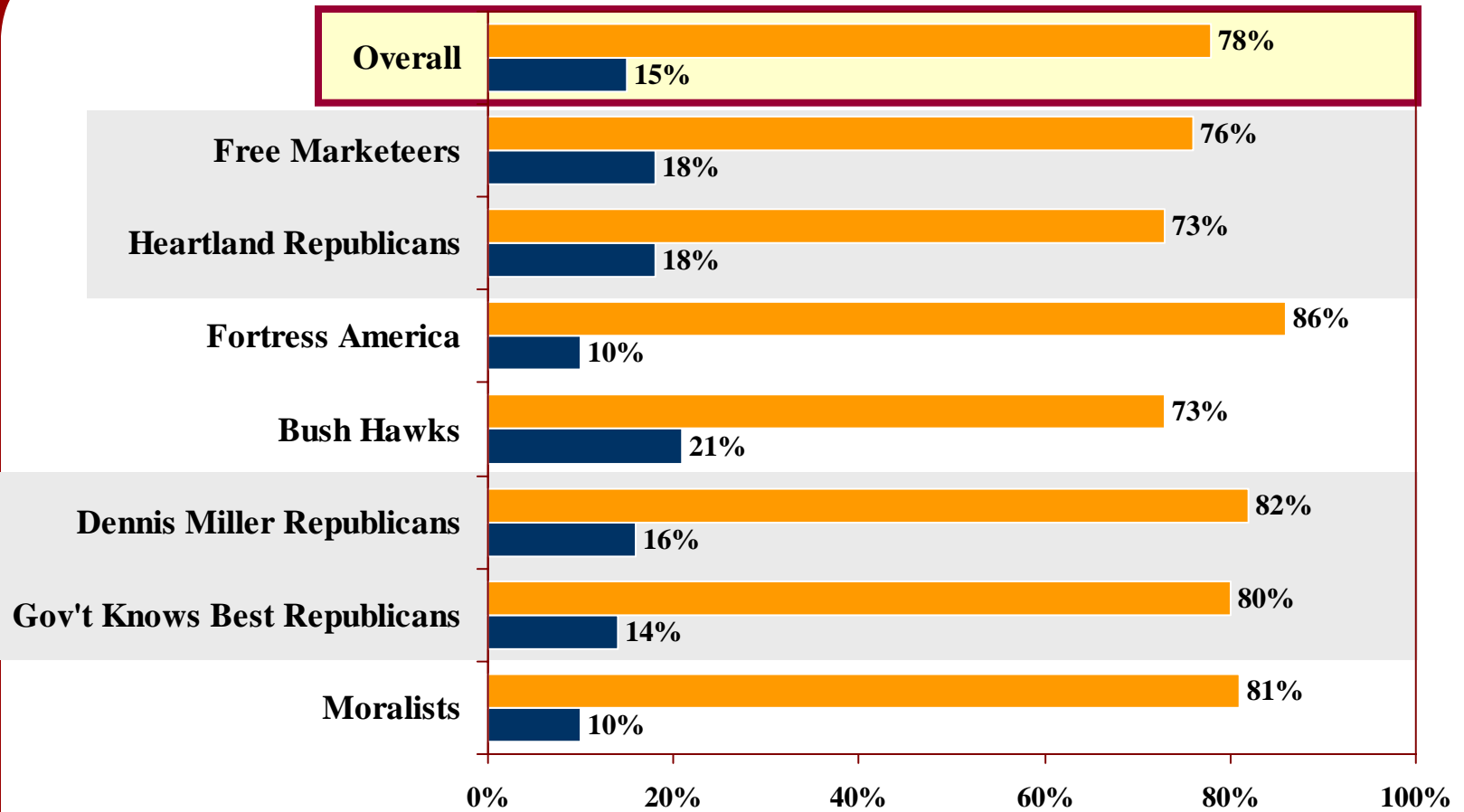
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Federal Budget

Which of the following statements comes
CLOSEST to YOUR opinion regarding
the federal budget?



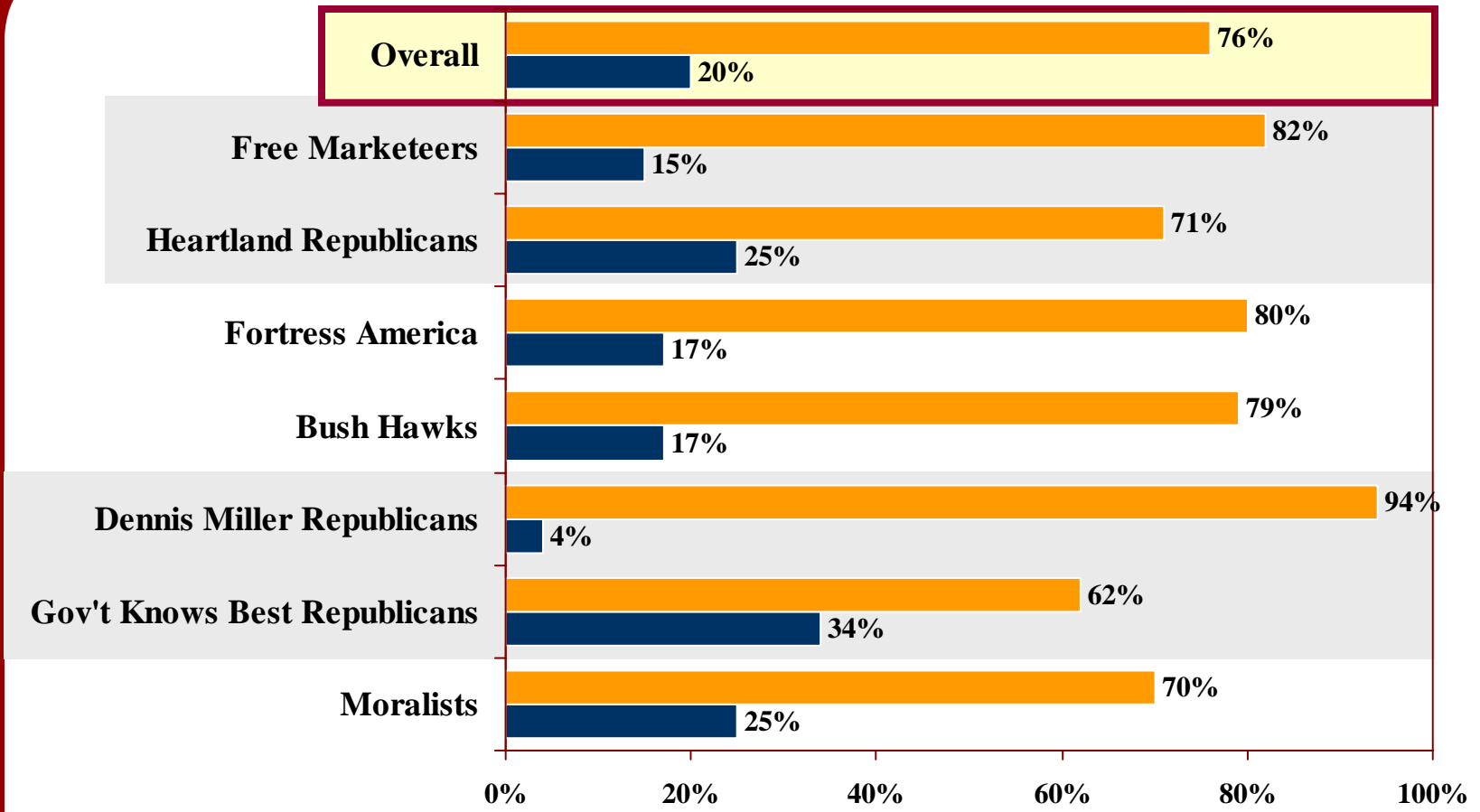
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Illegal Immigration

Which of the following should be the MOST important goal of the government regarding illegal immigration?



■ Ensure that all illegal immigrants follow the current laws and aren't given special treatment even if it means deporting them
■ Establishing new laws to make it easier for illegal immigrants who are already working and living in the U.S. to become legal citizens

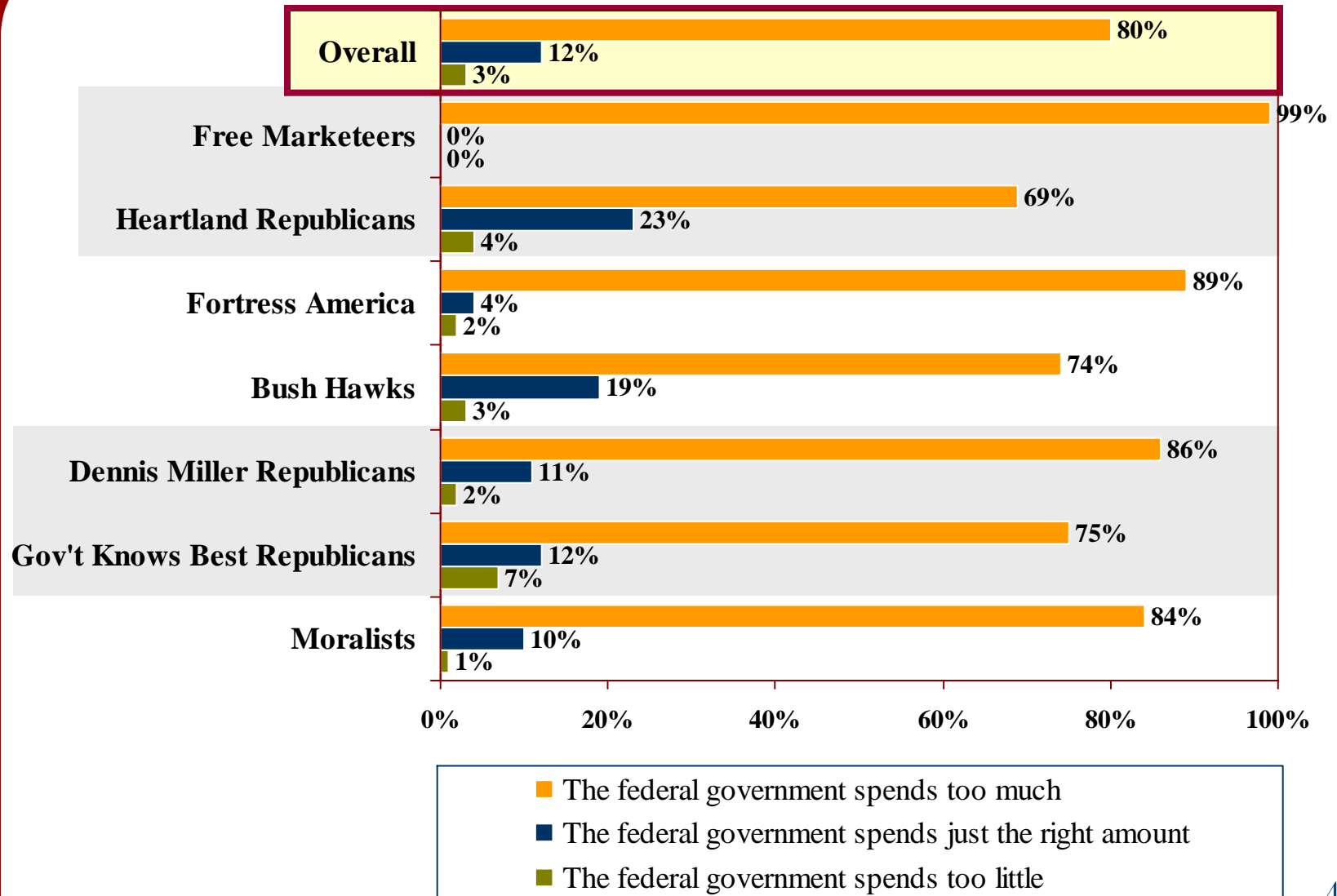
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Federal Spending

Which of the following statements comes
CLOSEST to YOUR opinion regarding
federal spending?



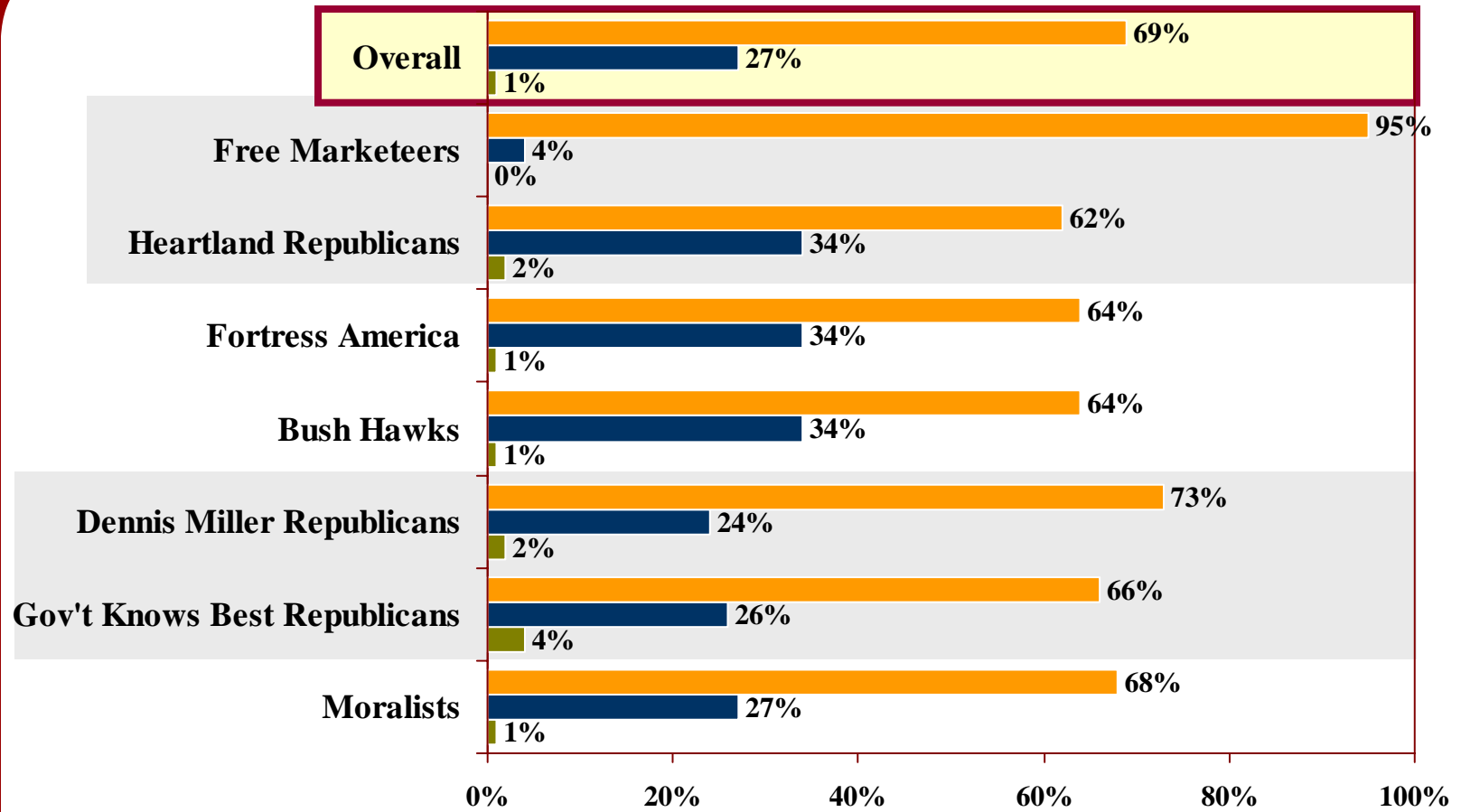
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Federal Taxes

Which of the following statements comes CLOSEST to YOUR opinion regarding federal taxes?



- Federal taxes are TOO high
- Federal taxes are just about right
- Federal taxes are NOT high enough

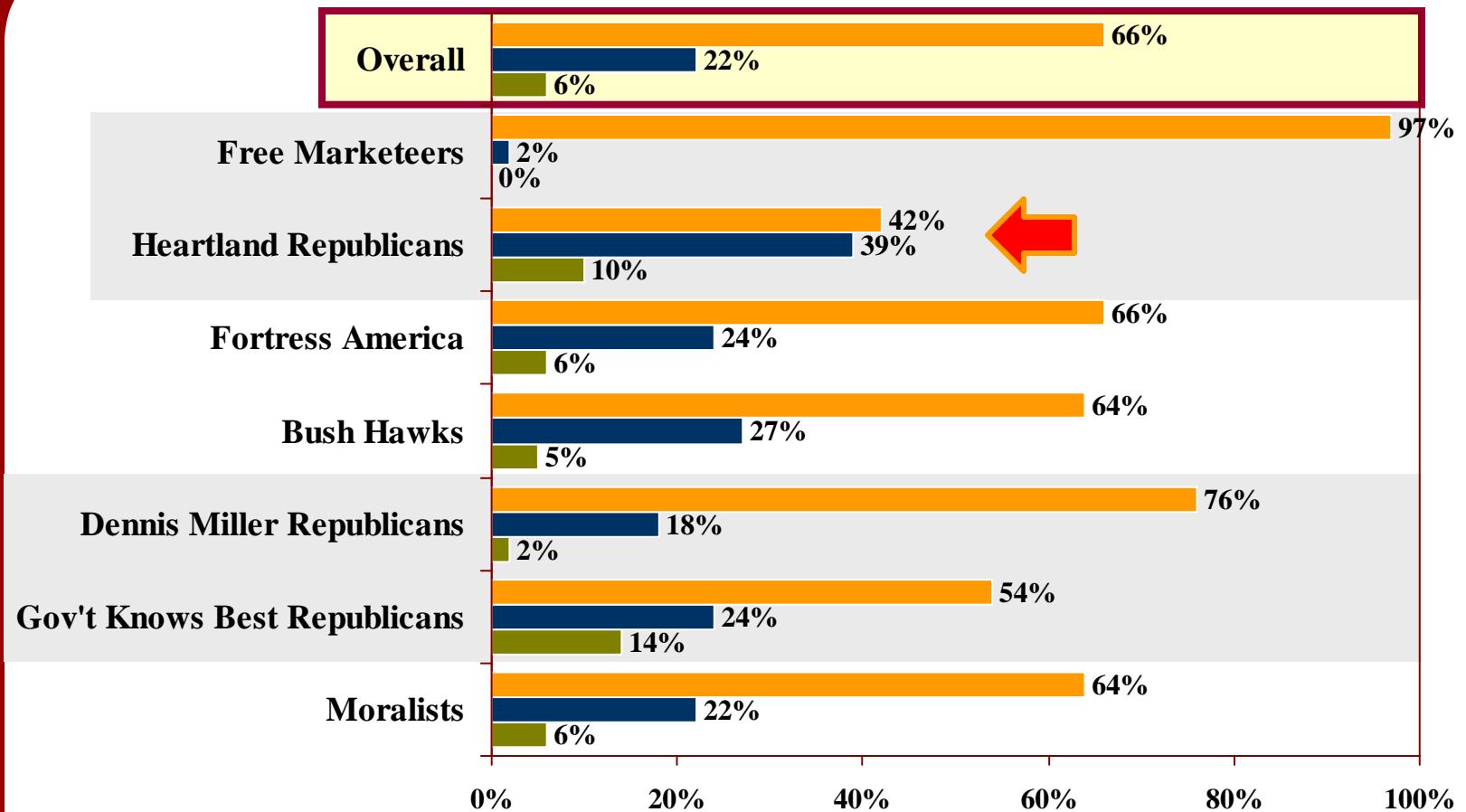
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Size of Federal Government

Which of the following statements comes CLOSEST to YOUR opinion regarding the size of the federal government?



- The federal government is too big and does too many things
- The federal government is just about the right size and does just about enough
- The federal government needs to be bigger because it doesn't do enough

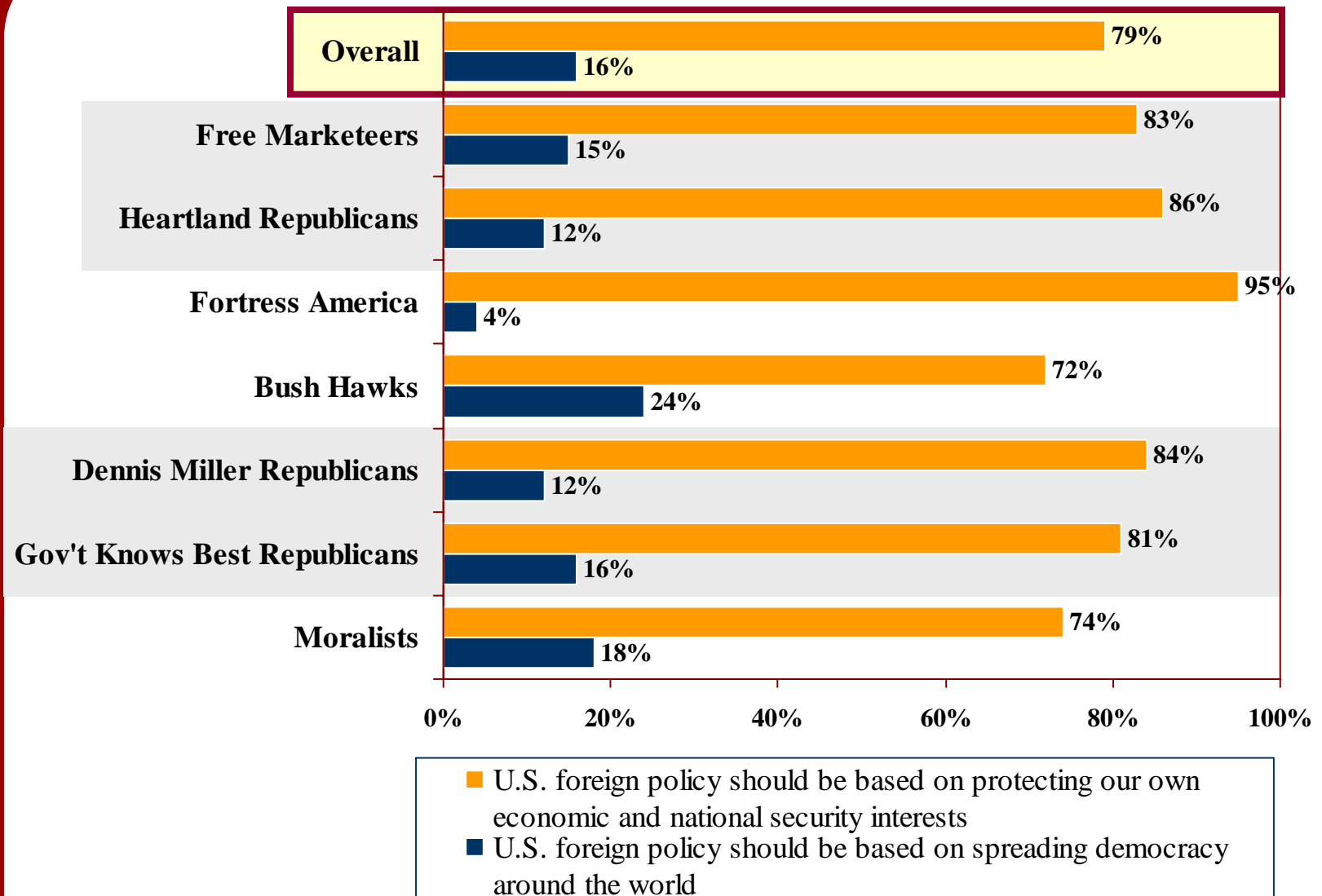
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U.S. Foreign Policy

Which of the following statements comes
CLOSEST to YOUR opinion regarding
U.S. foreign policy?



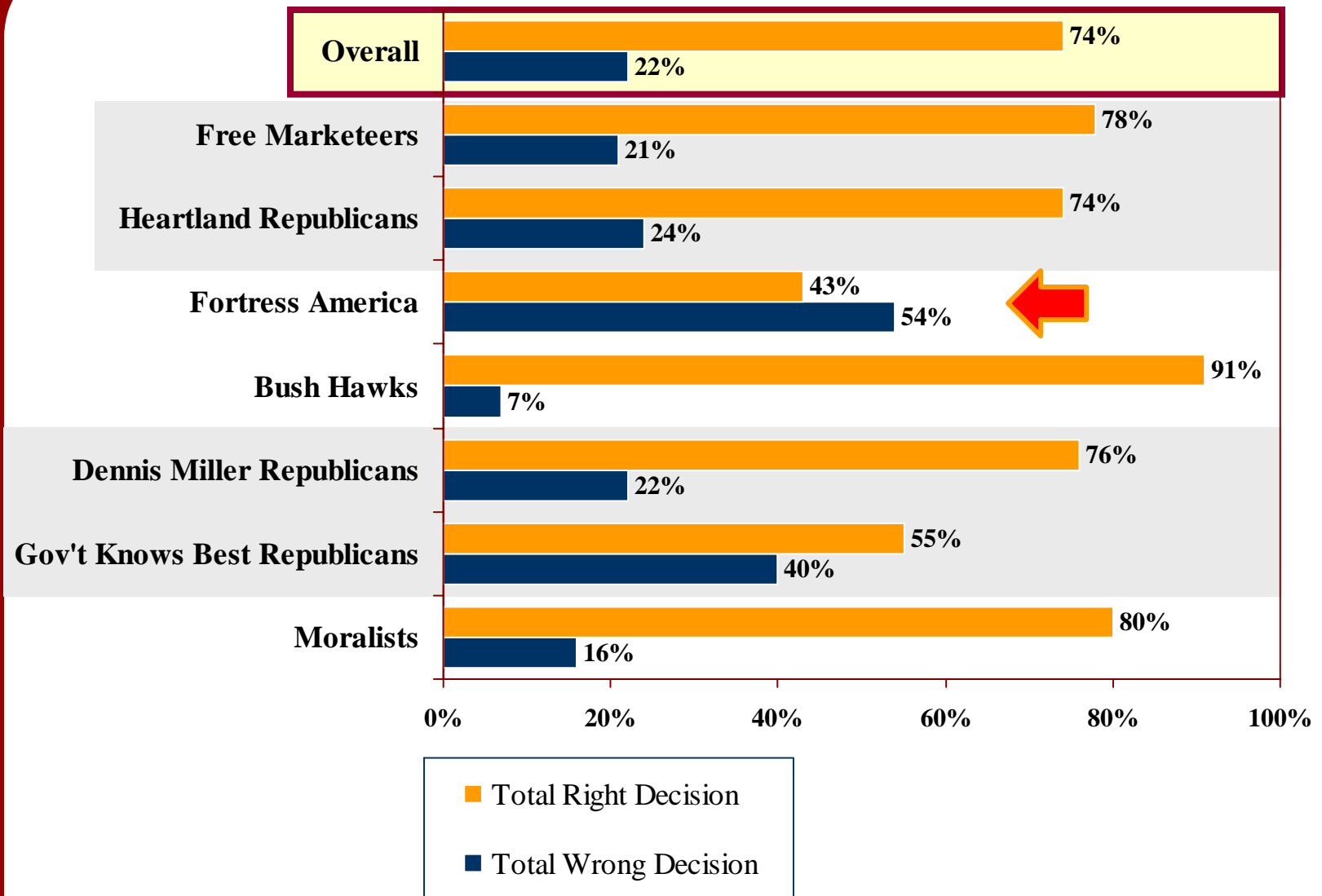
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War in Iraq: Right Decision?

Regardless of what you think should be done in Iraq right now, would you say that the decision to go to War in Iraq was the right decision or the wrong decision?



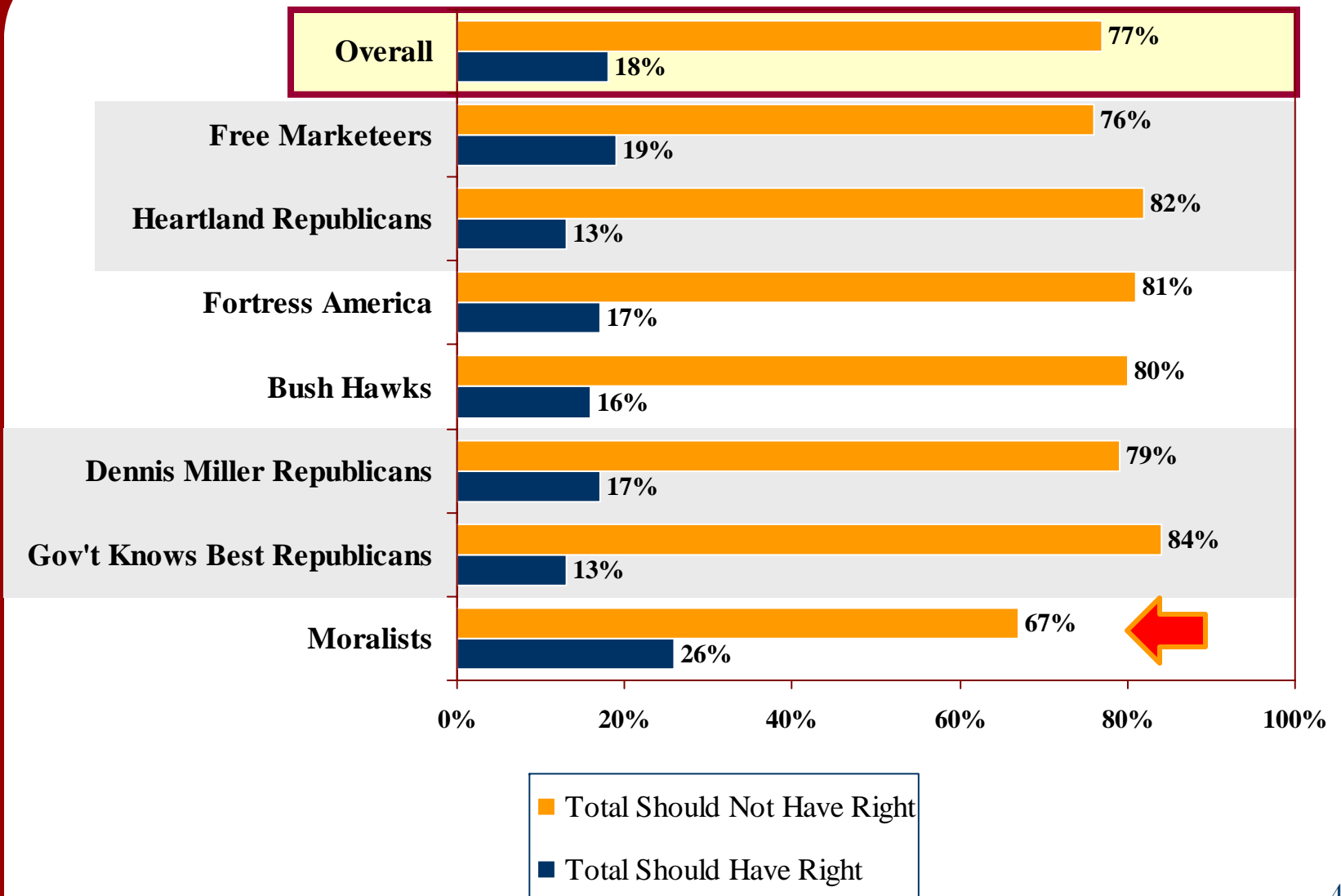
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Workplace Discrimination

In your opinion, should employers have the right to fire an employee based solely on their sexual orientation?



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Issues that Divide the GOP

Issues that Divide



- GOP division on:
 - Top priority – cutting taxes or balancing budget
 - Whether health care coverage is a right
 - Fund SS or allow private investment
 - Level of military/defense spending
 - Role of federal government in education
 - Allowing gays to serve in the military
 - Role of federal government on global warming
 - Private initiative vs. government safety net
 - Abortion
 - Influence of religion on public policy

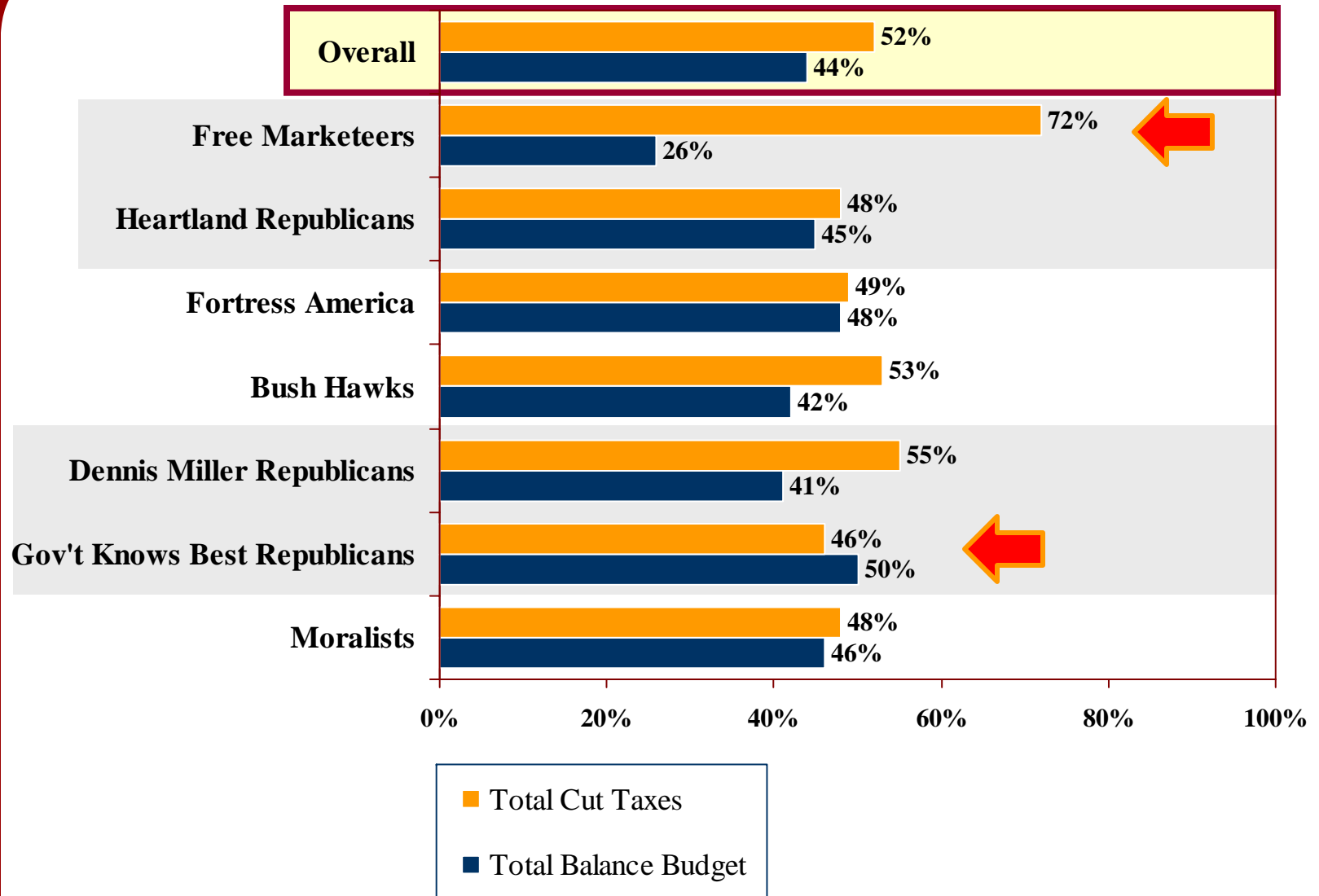
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Balancing Budget vs. Cutting Taxes

Which of the following two goals is MOST important to you – cutting taxes or balancing the budget?



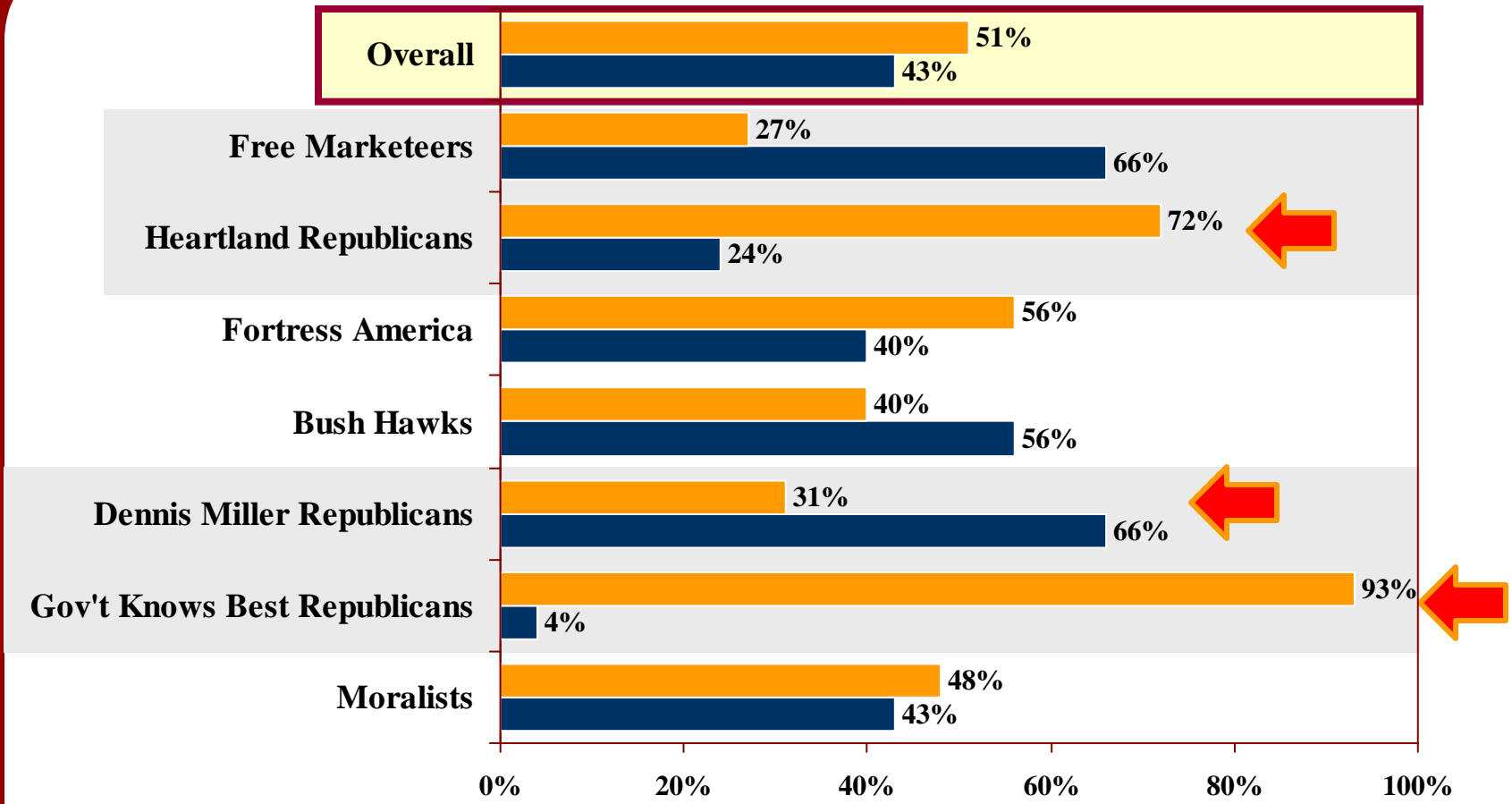
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Health Care Coverage

Which of the following statements comes CLOSEST to YOUR opinion regarding health care?



■ Universal health care coverage SHOULD BE a guaranteed right of every American
■ Universal health care coverage SHOULD NOT be a guaranteed right of every American

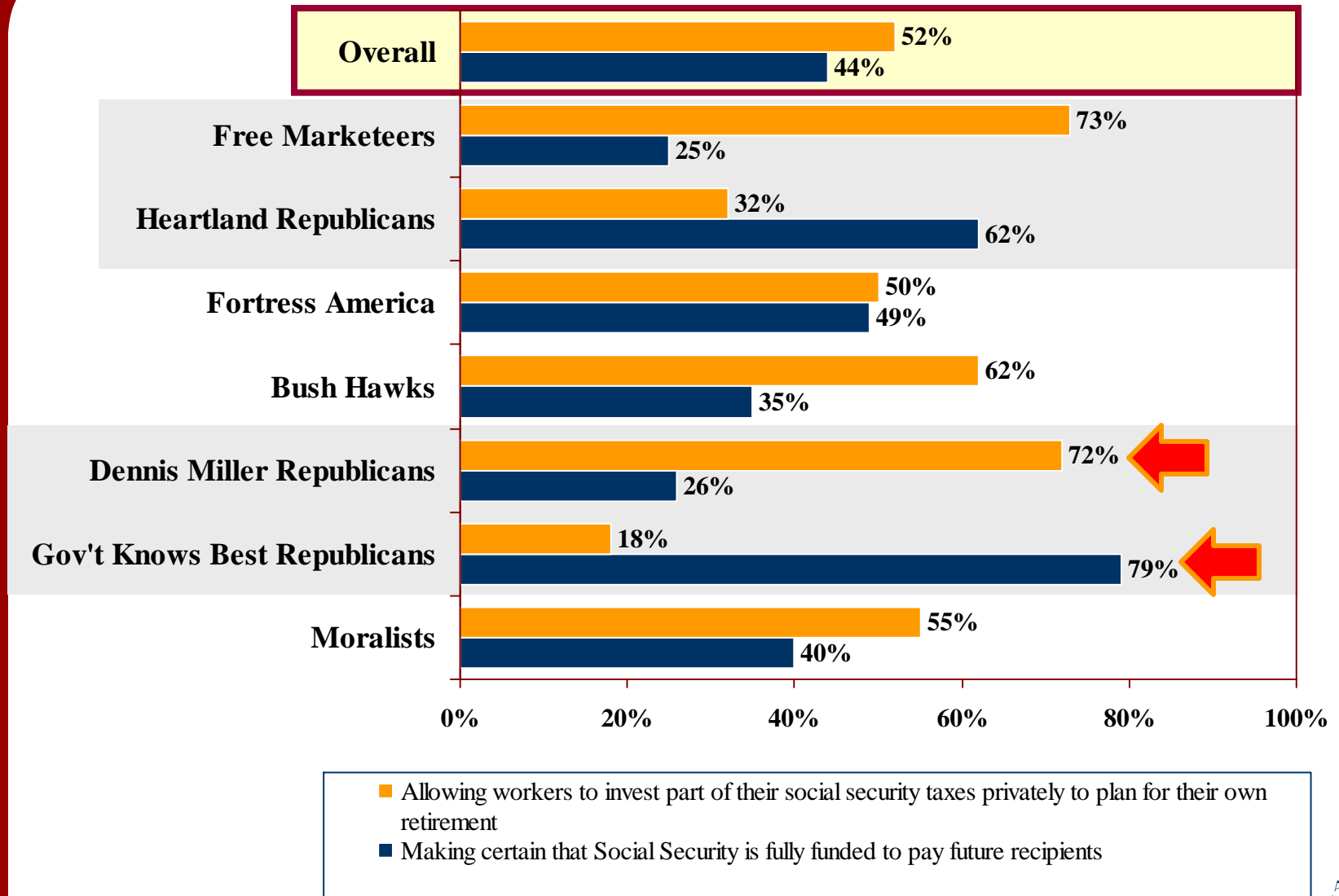
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Social Security vs. Private Accounts

Which of the following should be the MOST important goal of the government regarding retirement security?



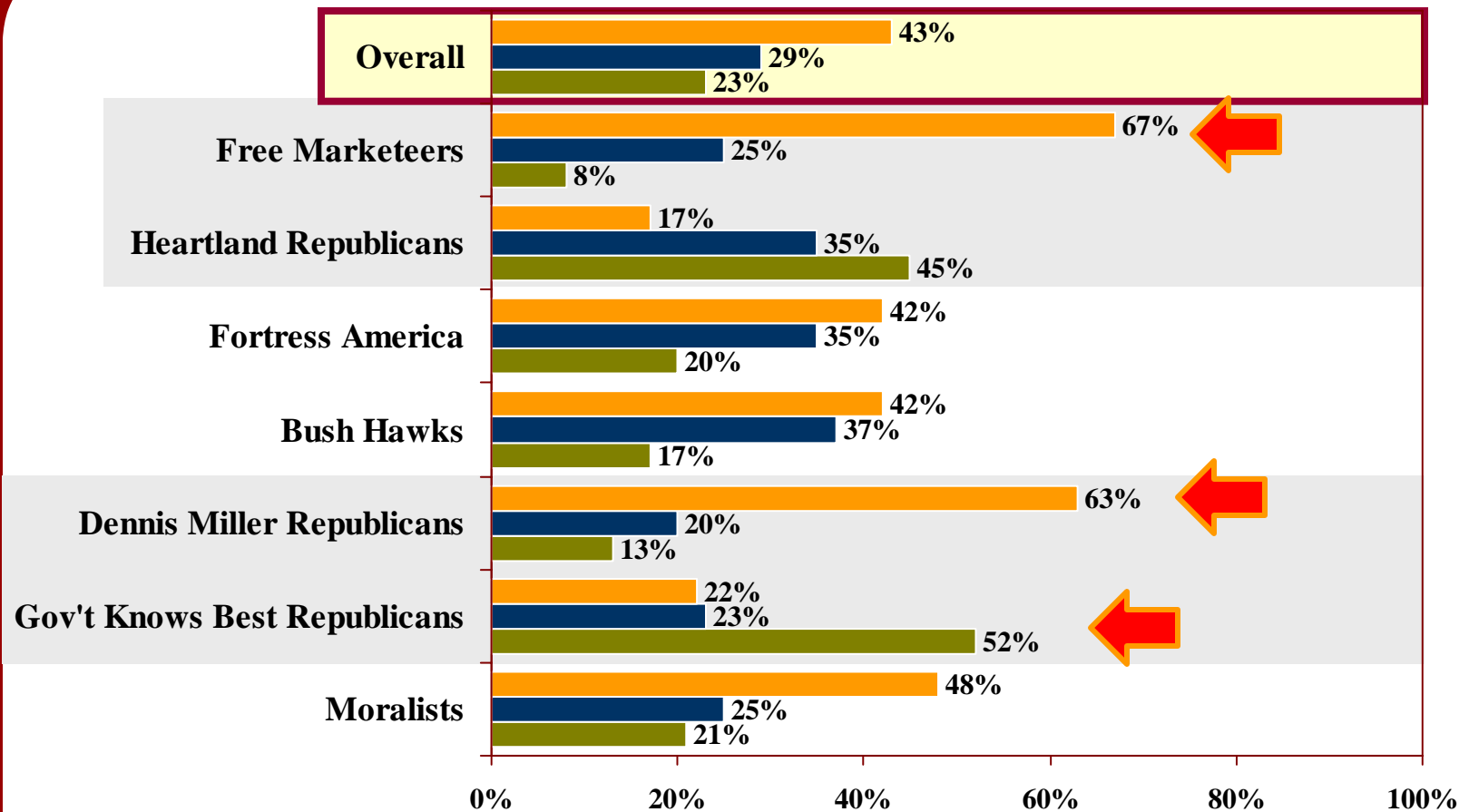
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Education & Federal Government

Which of the following statements comes CLOSEST to YOUR opinion regarding education and the federal government?



- The federal government is TOO involved in our education system
- The federal government involvement in our education system is just about right
- The federal government is NOT involved ENOUGH in our education system

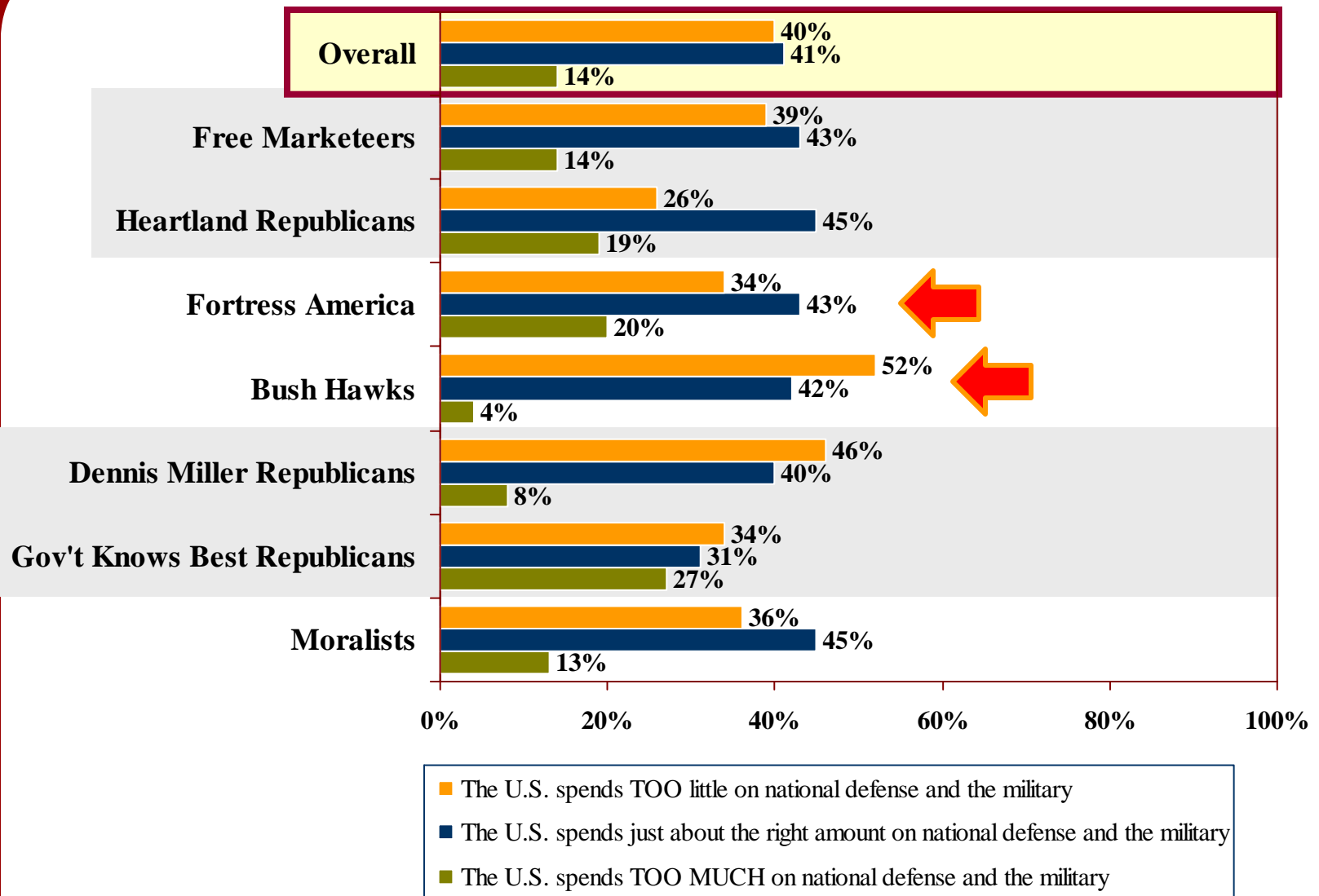
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Defense & Military Spending

Which of the following statements comes CLOSEST to YOUR opinion regarding defense and military spending?



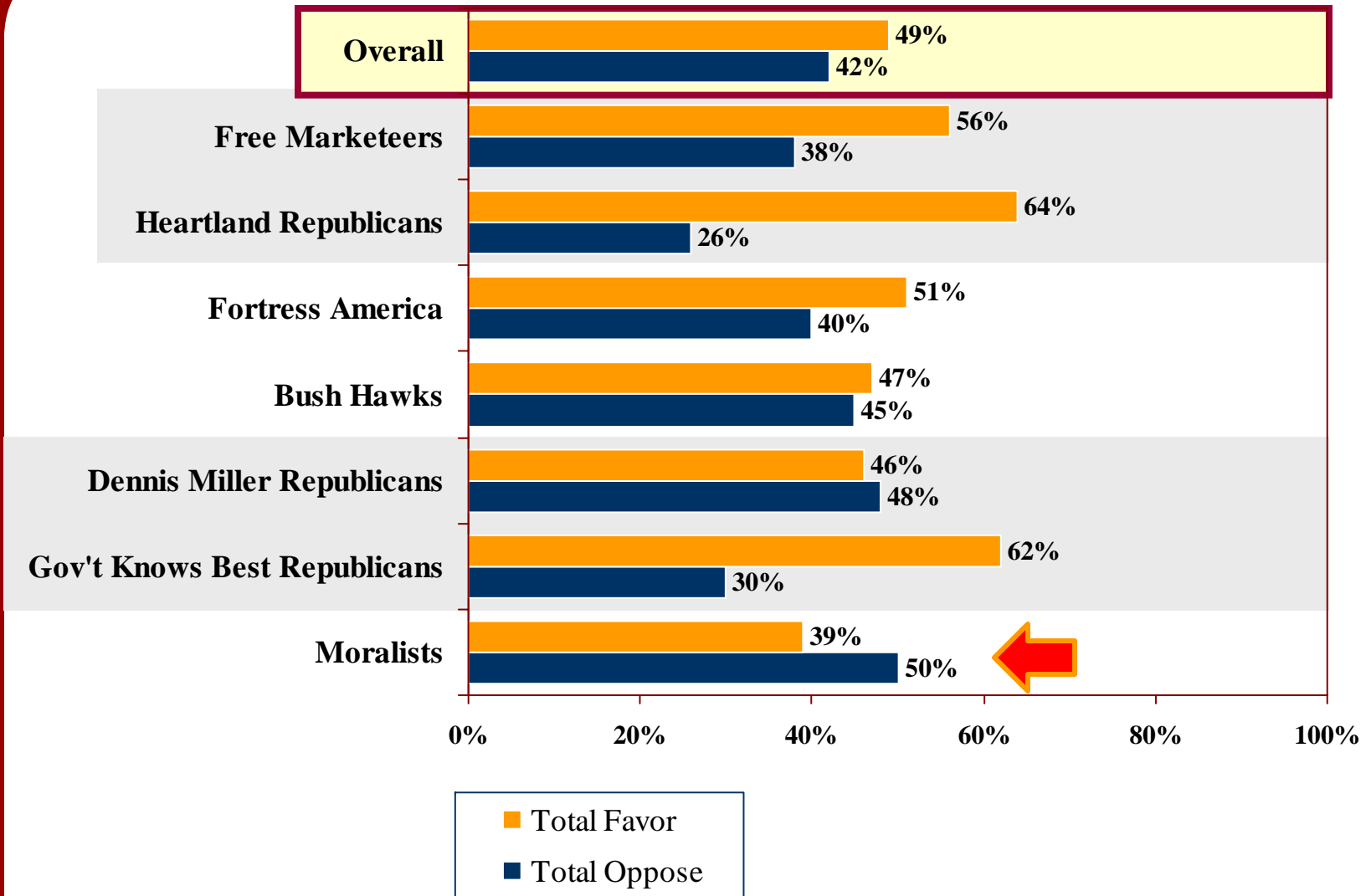
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Gays in the Military?

Do you favor or oppose allowing gays and lesbians to openly serve in the U.S. Military?



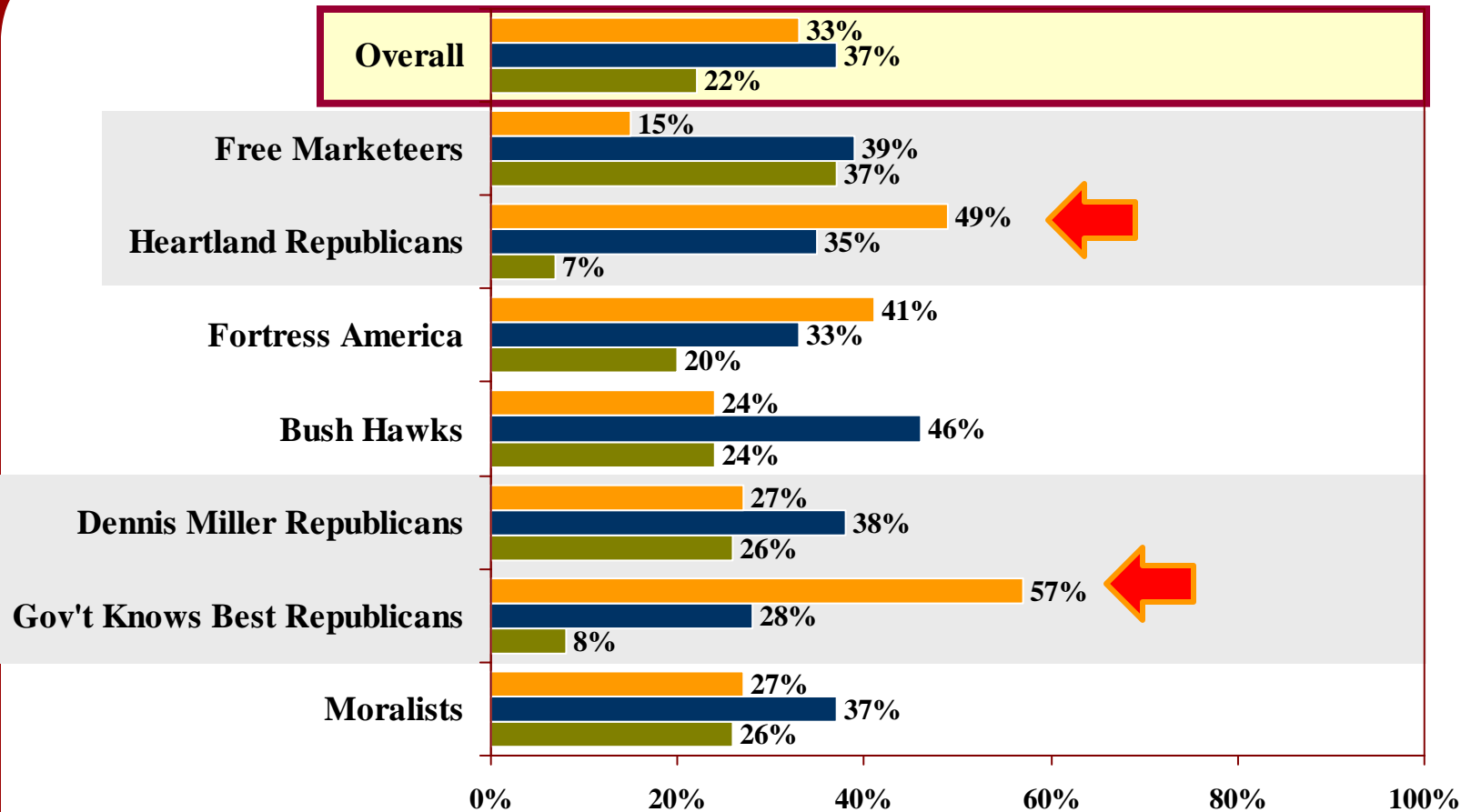
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Federal Government & Global Warming

Which of the following statements comes CLOSEST to YOUR opinion regarding federal government and global warming?



■ The federal government is NOT doing enough to deal with global warming
■ The federal government is doing just about the right amount to deal with global warming
■ The federal government is doing TOO much to deal with global warming

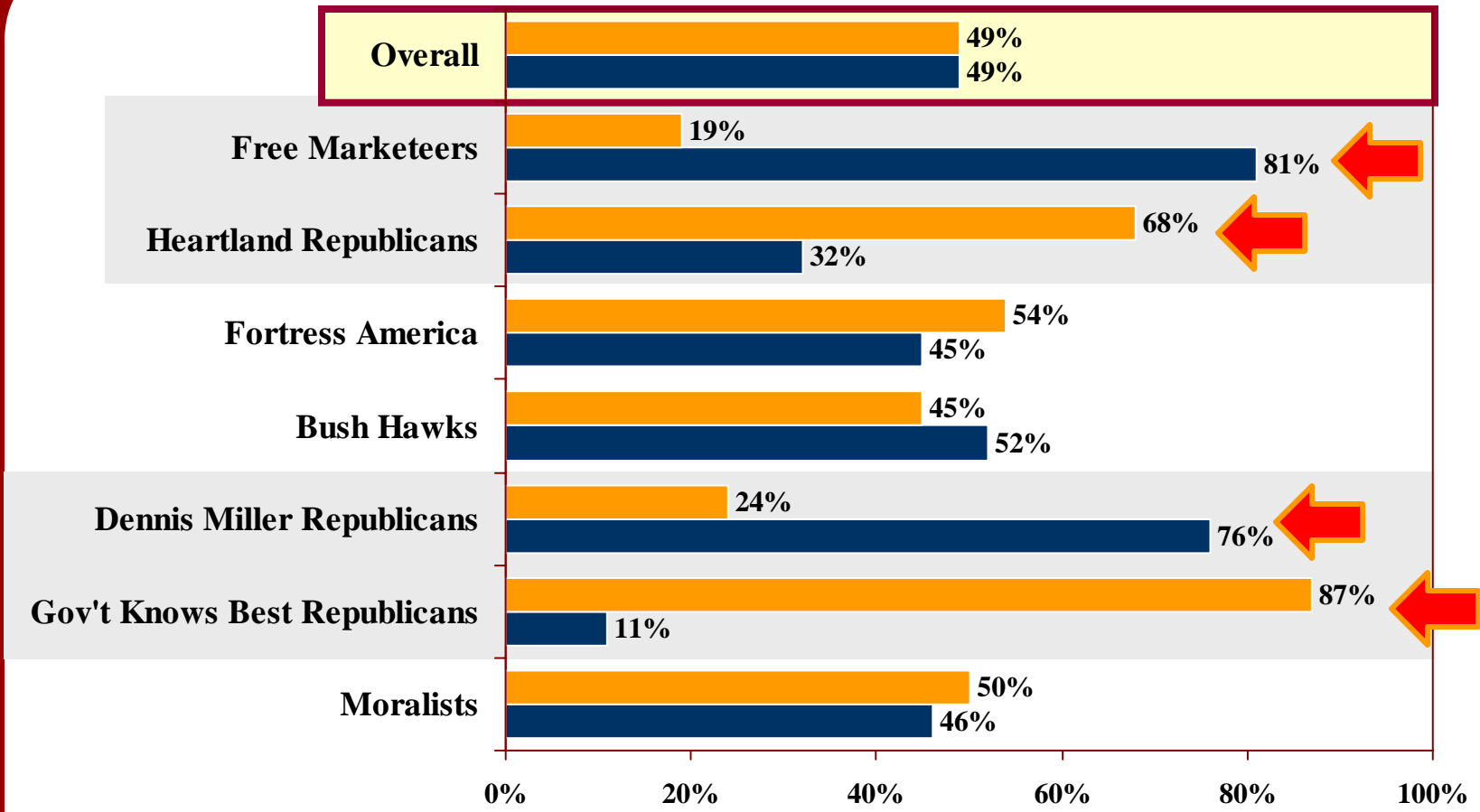
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Personal Initiative vs. Government Safety Net

Which of the following statements regarding making it in life comes **CLOSEST** to your opinion?



■ People should try to make it on their own, but government should be there with a helping hand for those who can't make it on their own
■ People should always make their own way in life and not look for a hand out from the government

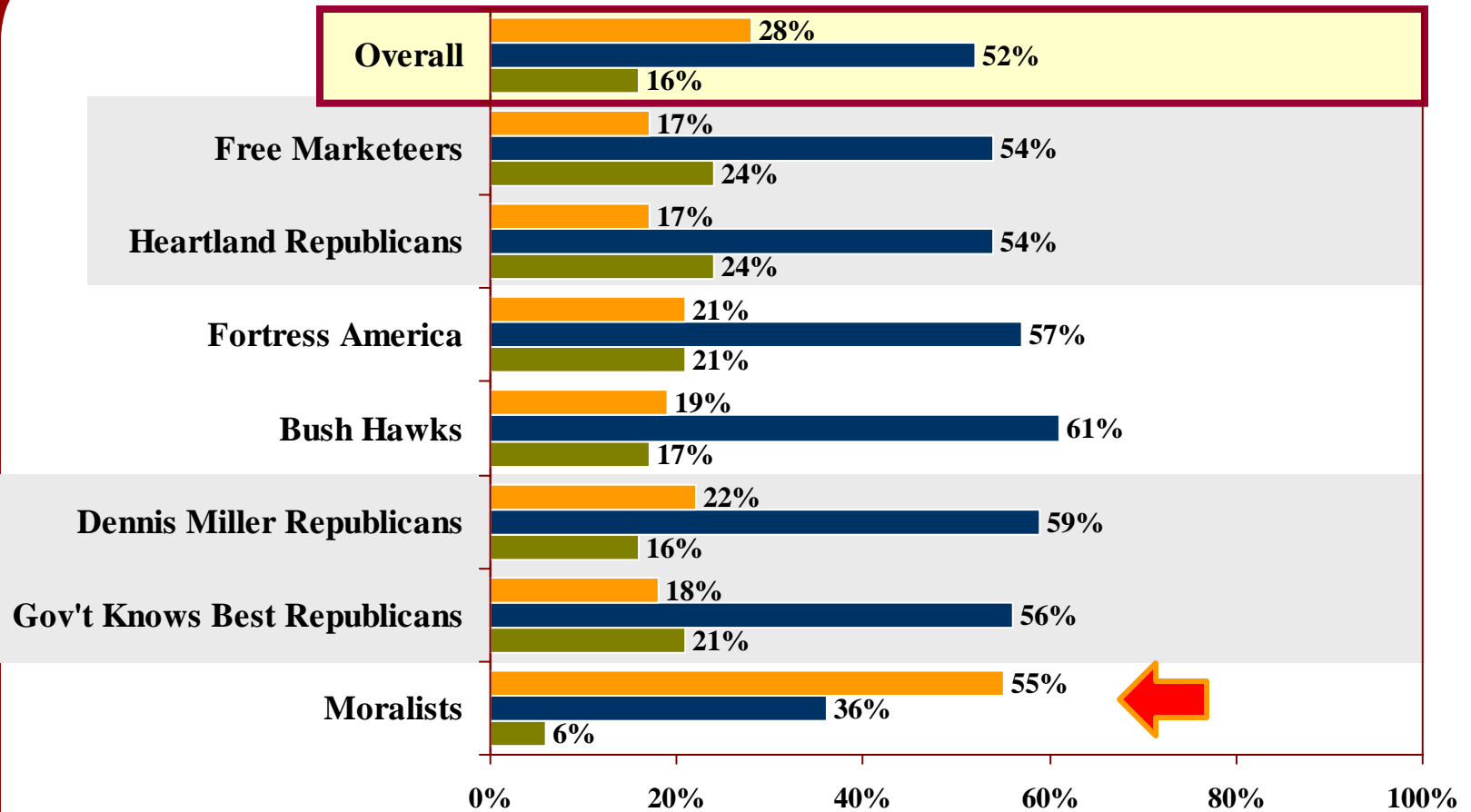
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Abortion

Which of the following statements comes CLOSEST to YOUR opinion regarding abortion?



- Abortion should be illegal under any circumstances
- Abortion should be legal only in certain circumstances
- Abortion should be legal under any circumstances

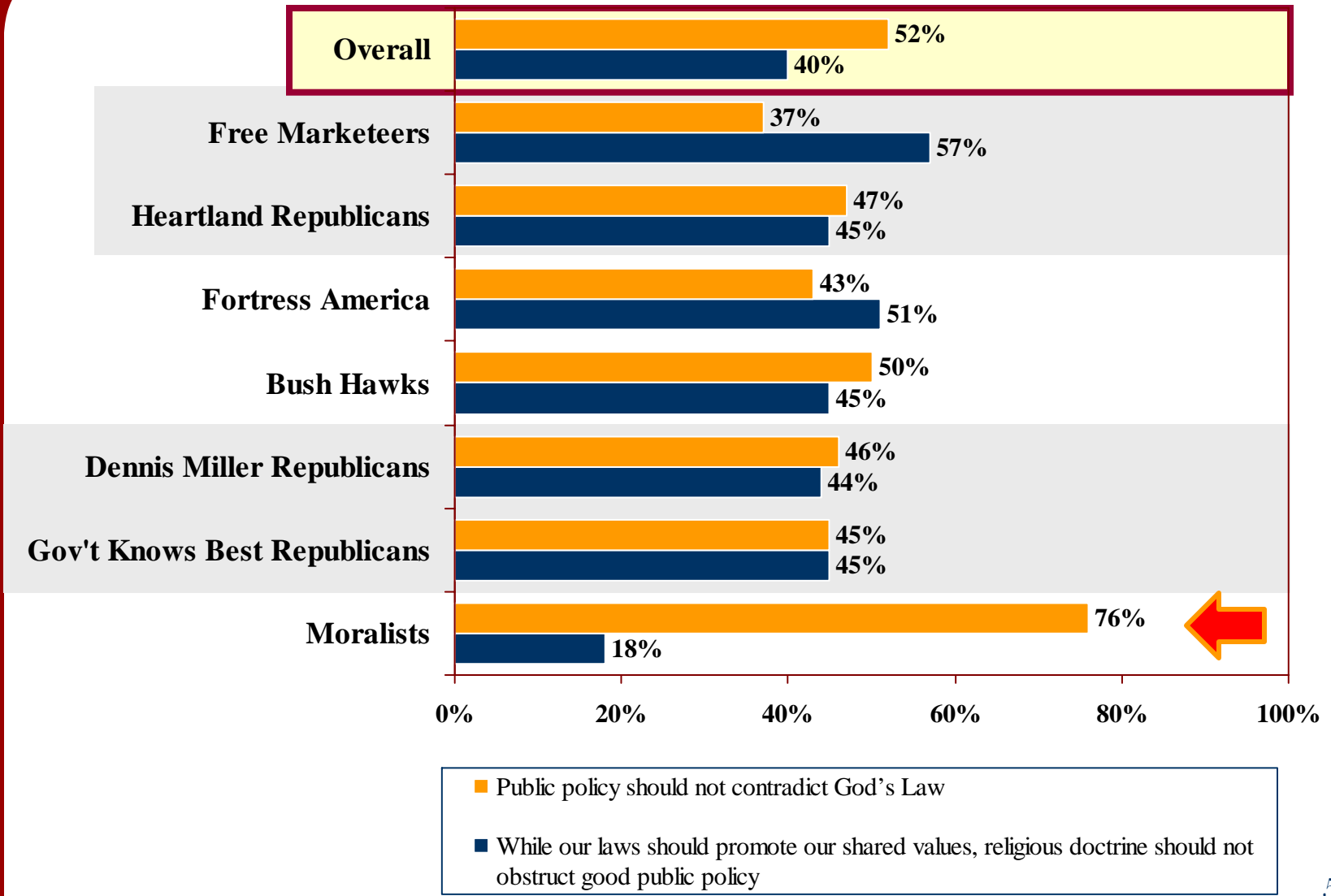
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Impact of Religion on Public Policy

Which of the following statements comes CLOSEST to your opinion?



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Presidential Candidates and Ballots



Key Points



- Giuliani leads field overall and in each segment, but Thompson emerging on right
- McCain does best with more moderate segments and underperforms with the most pro-War group - Bush Hawks
- Thompson already in 2nd place among three of seven segments
- Nearly 1 in 5 Moralists still undecided
- Race still very fluid - only 1 in 4 firmly committed to their vote
- 1 in 6 GOPers say they would consider voting for Bloomberg as an Independent

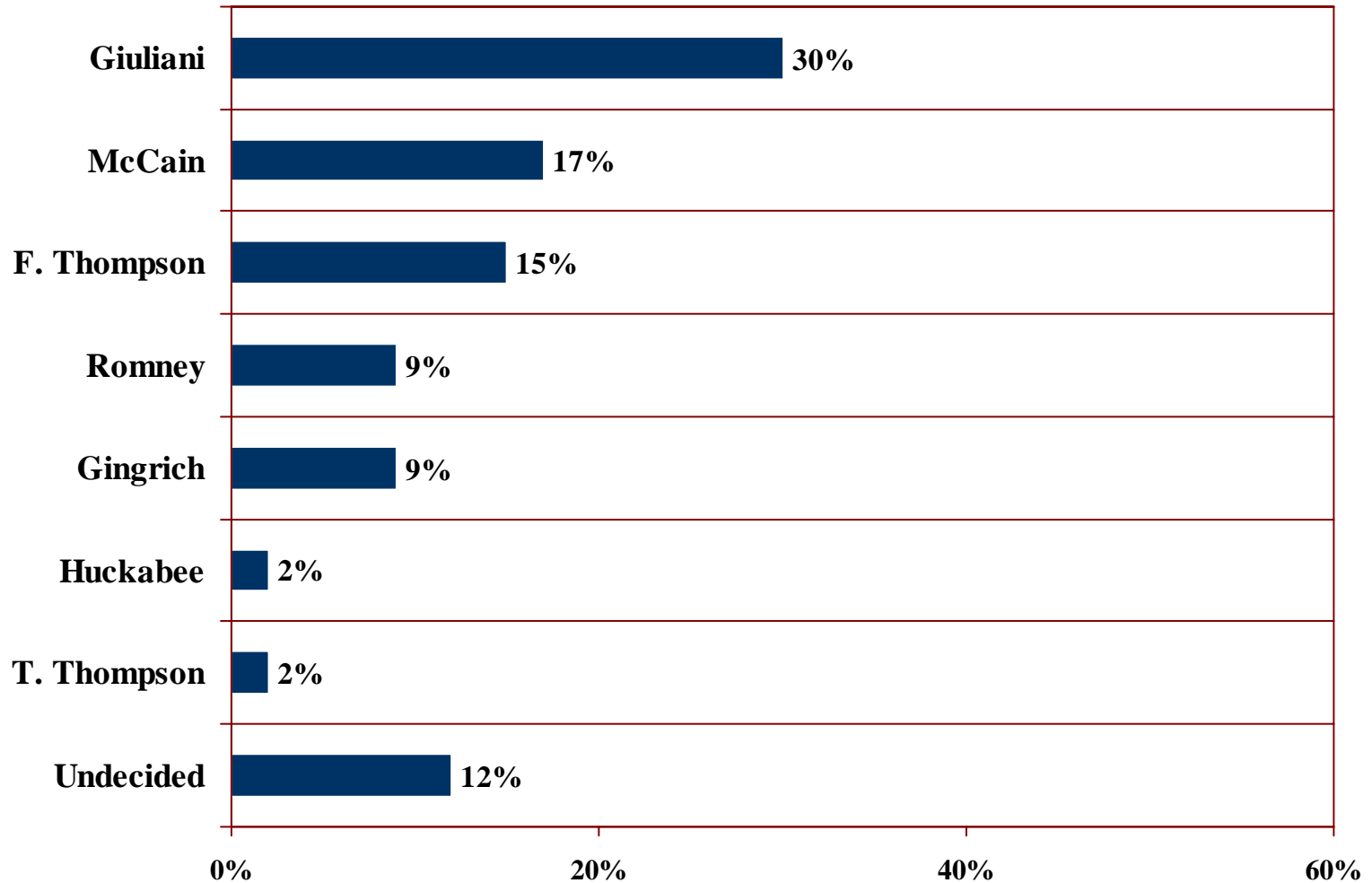
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Republican Primary Ballot All Voters

If the Republican primary or caucus for President were held today in your state for whom would you vote if the candidates were...



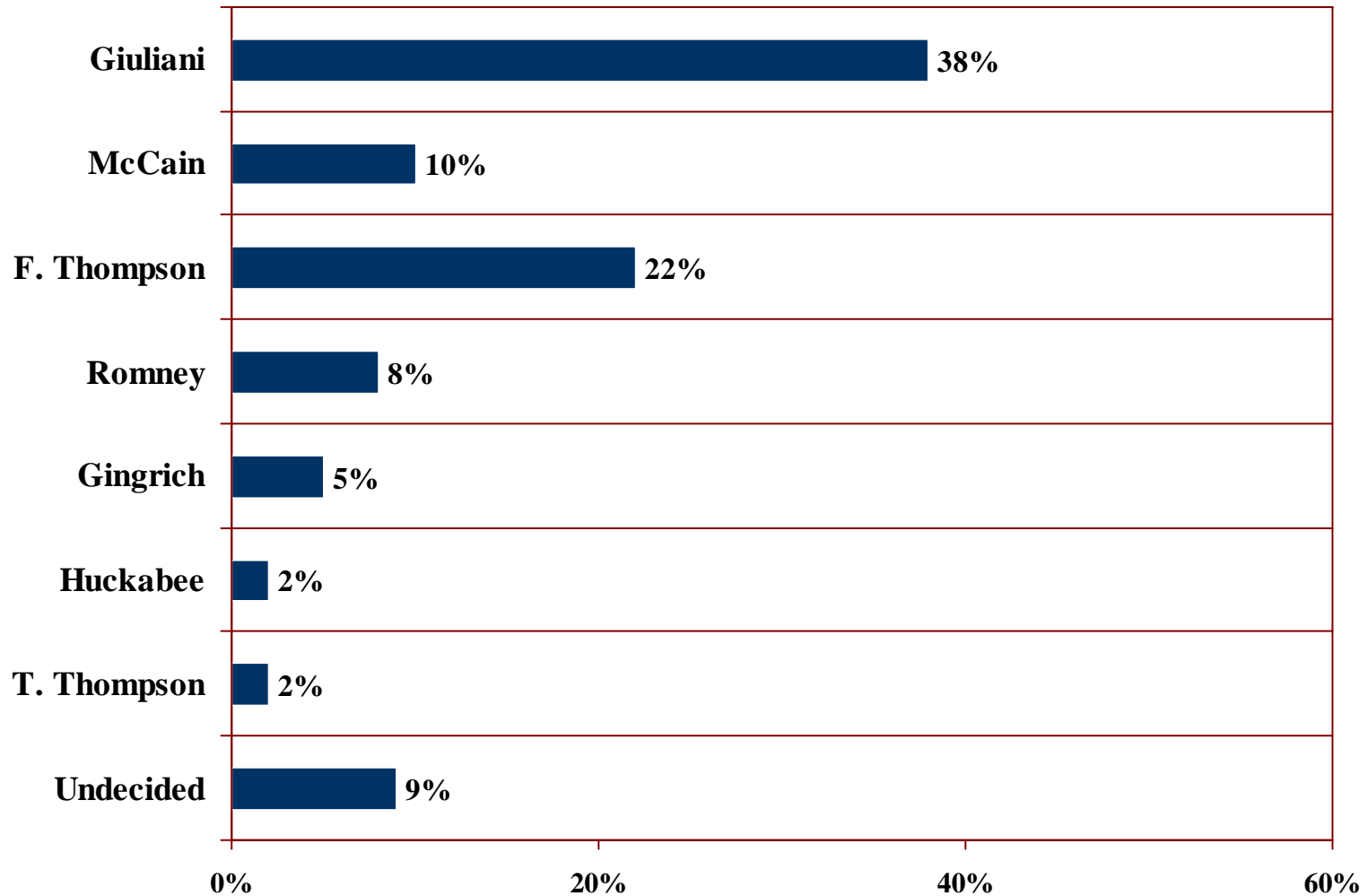
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Republican Primary Ballot “Free Marketeers”

If the Republican primary or caucus for President were held today in your state for whom would you vote if the candidates were...



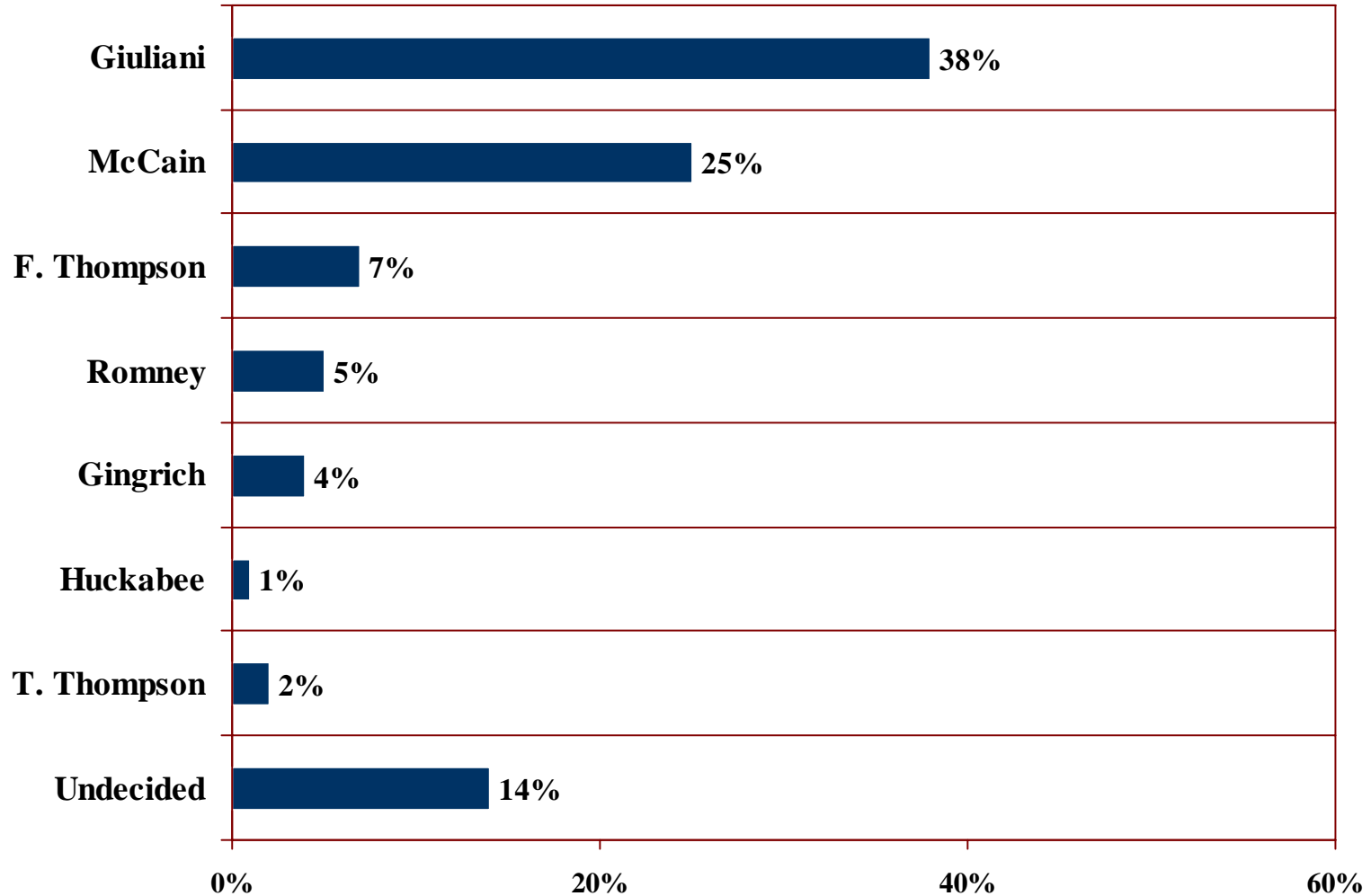
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Republican Primary Ballot “Heartland Republicans”

If the Republican primary or caucus for President were held today in your state for whom would you vote if the candidates were...



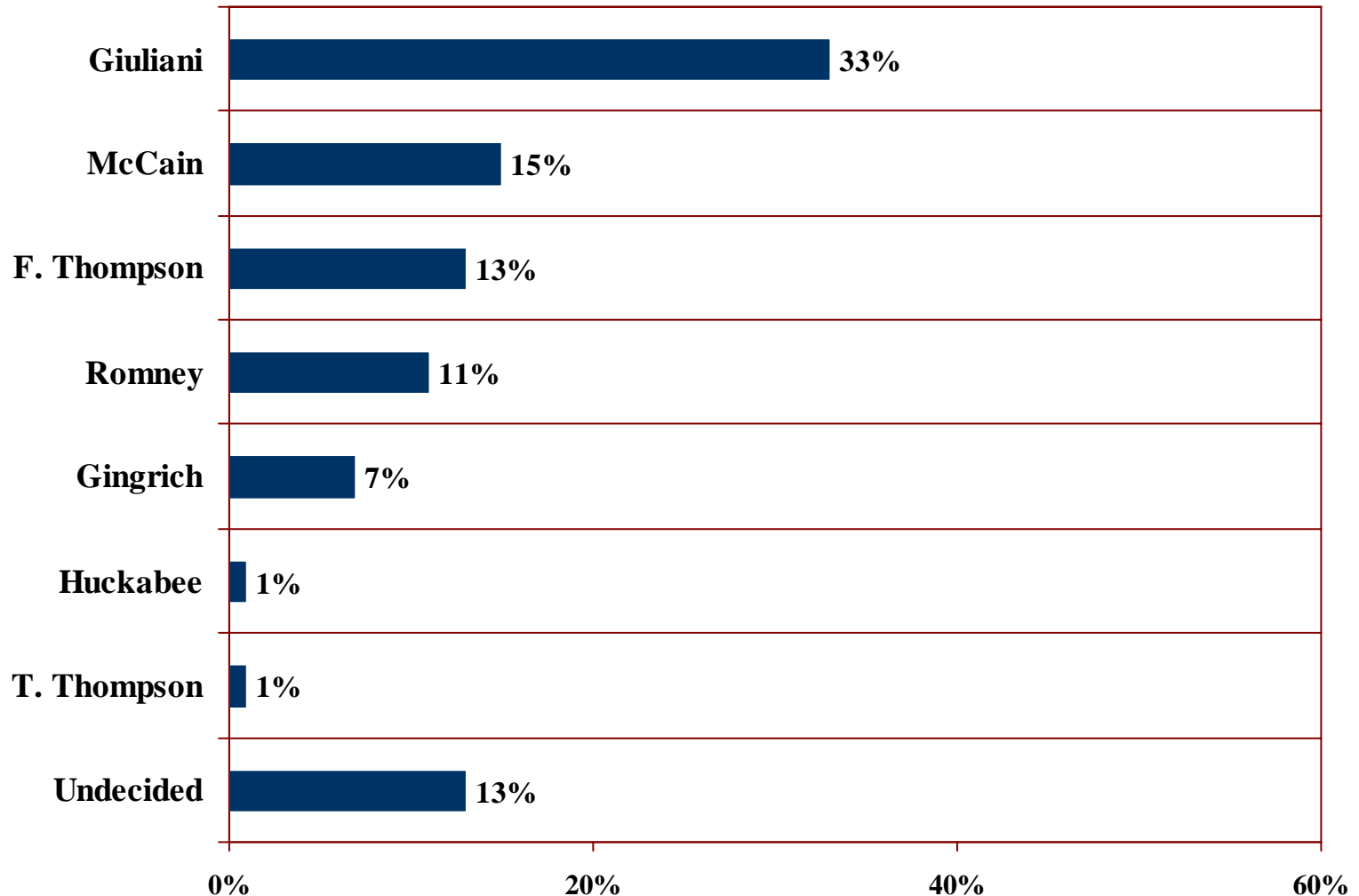
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Republican Primary Ballot “Fortress America”

If the Republican primary or caucus for President were held today in your state for whom would you vote if the candidates were...



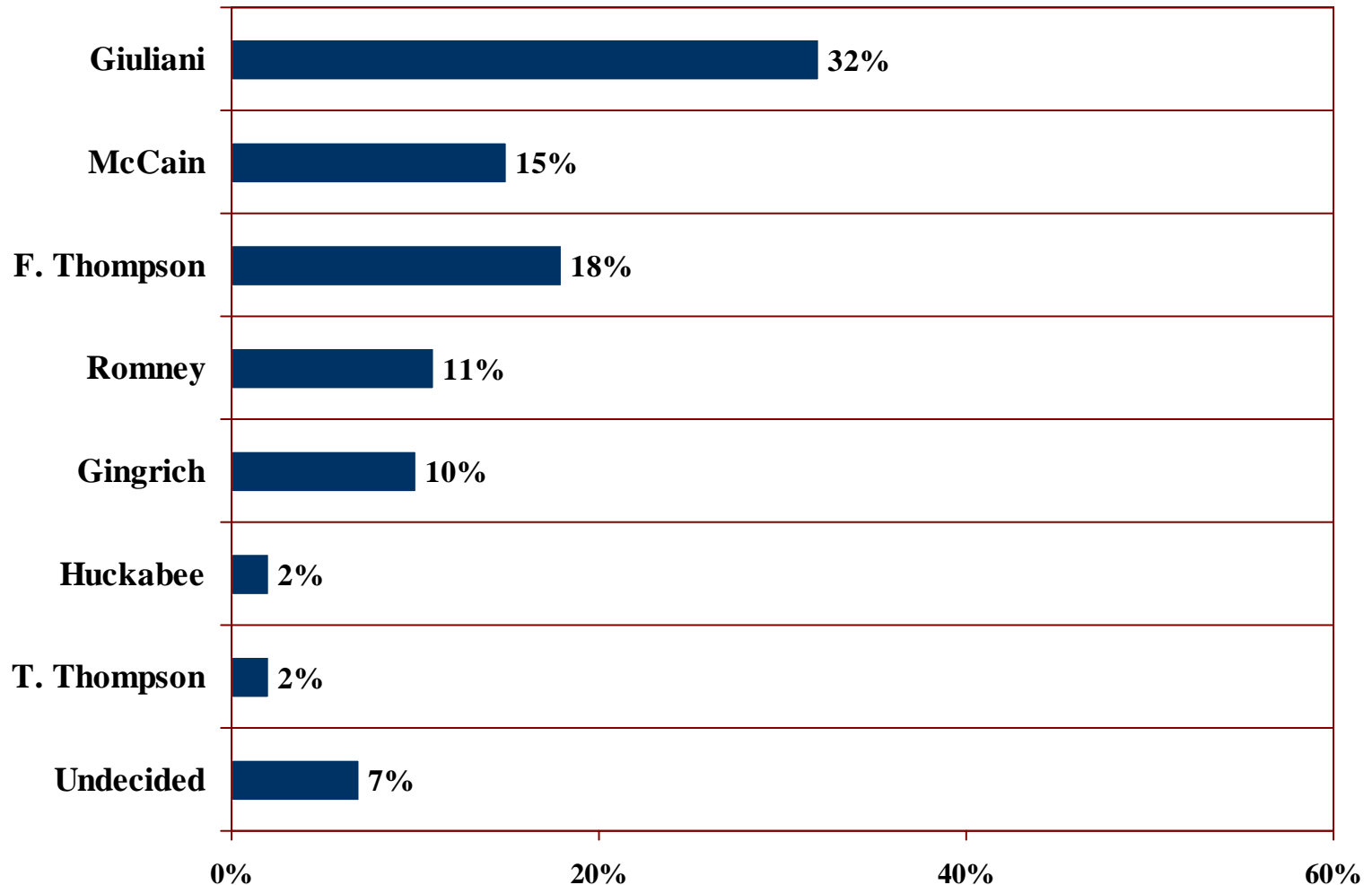
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Republican Primary Ballot “Bush Hawks”

If the Republican primary or caucus for President were held today in your state for whom would you vote if the candidates were...



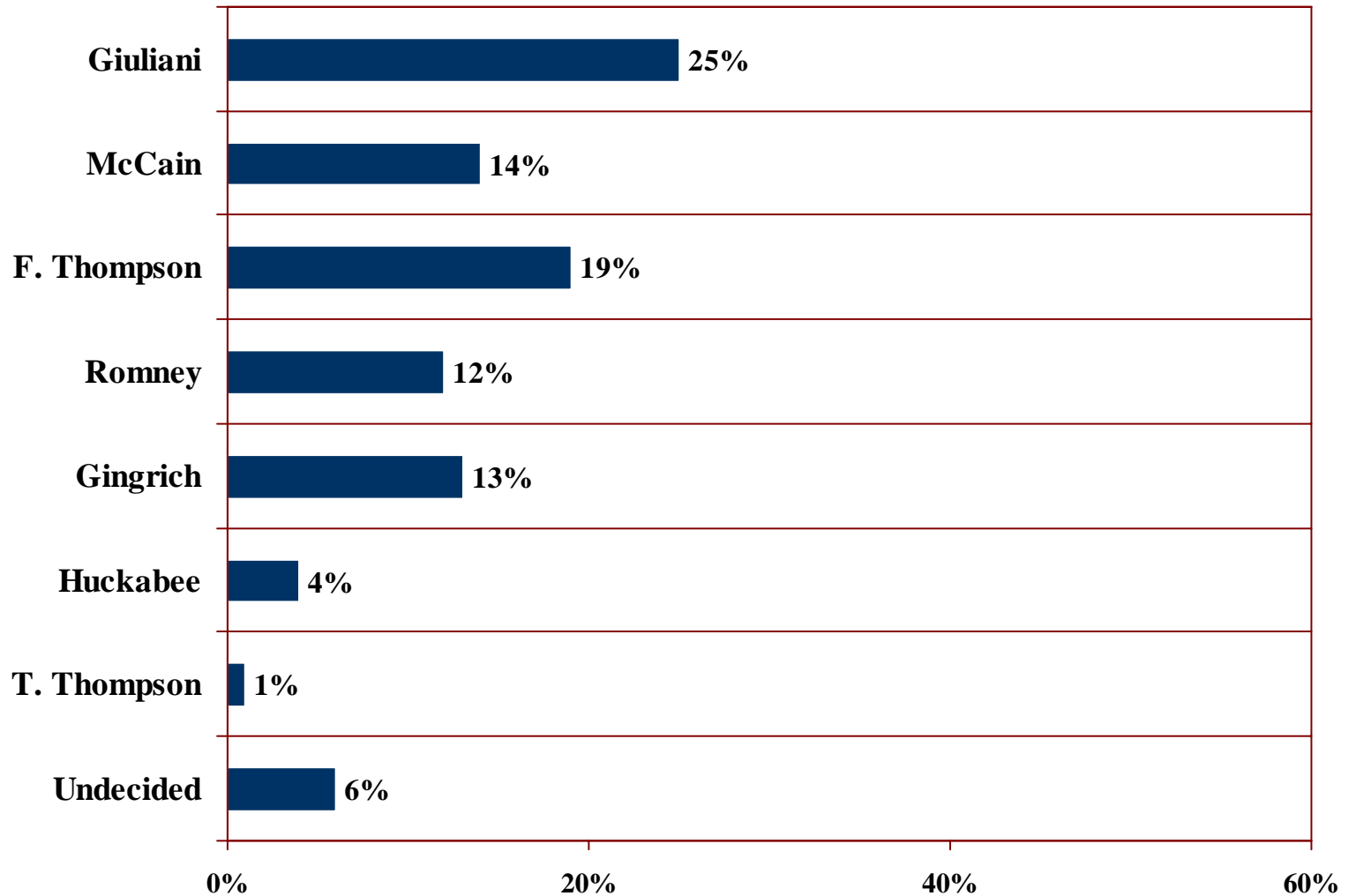
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Republican Primary Ballot “Dennis Miller Republicans”

If the Republican primary or caucus for President were held today in your state for whom would you vote if the candidates were...



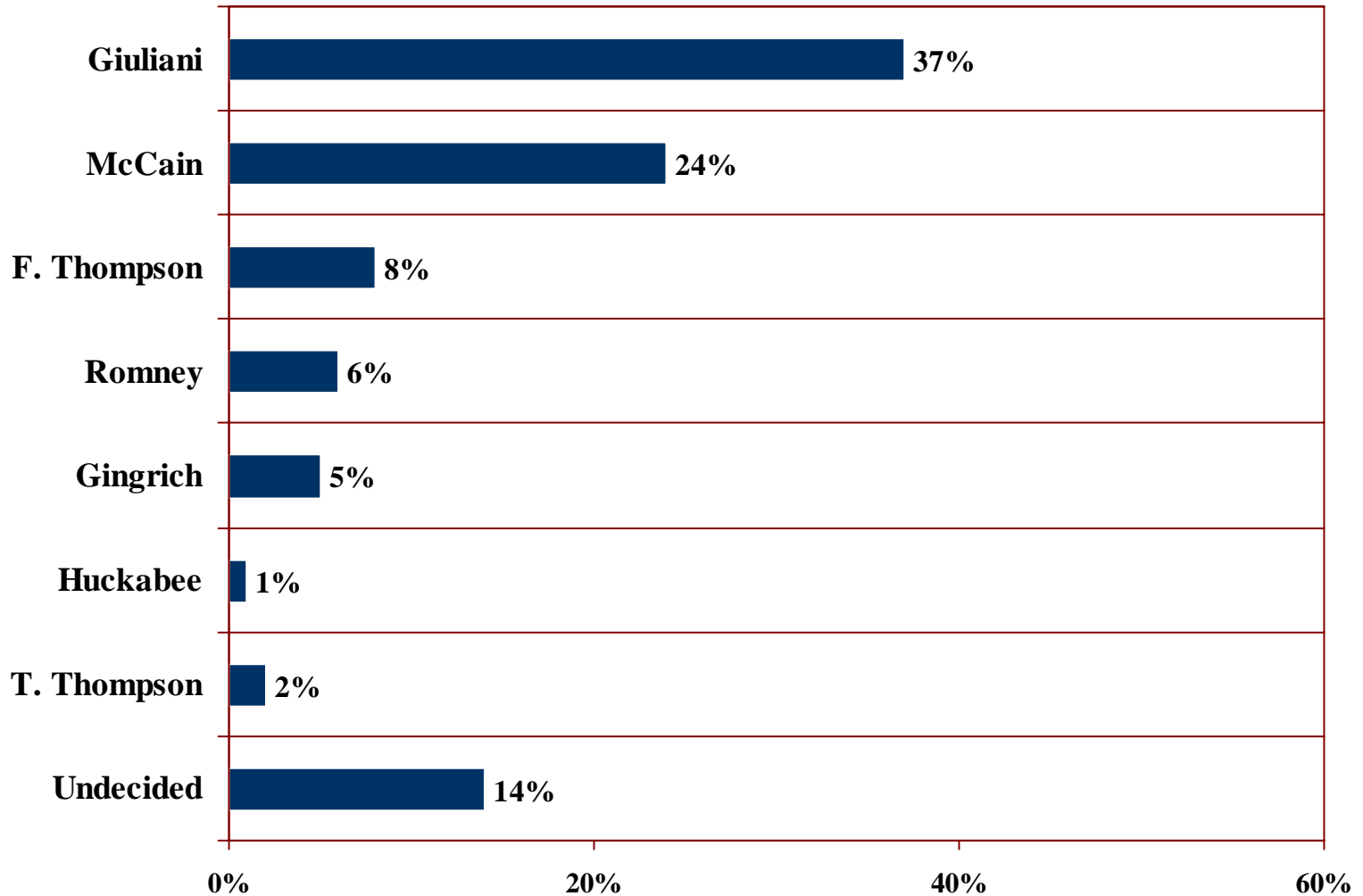
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Republican Primary Ballot "Gov't Knows Best Republicans"

If the Republican primary or caucus for President were held today in your state for whom would you vote if the candidates were...



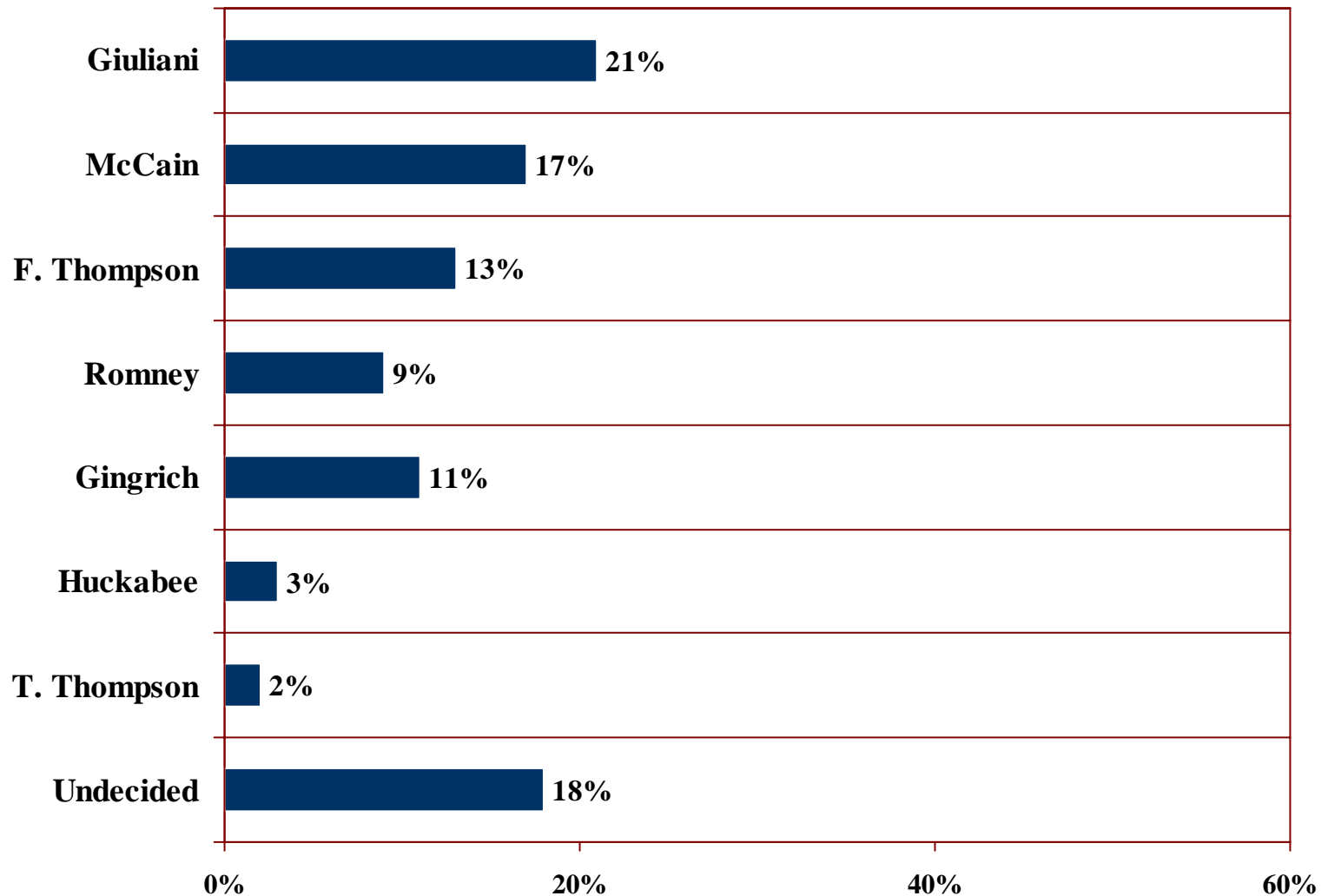
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Republican Primary Ballot “Moralists”

If the Republican primary or caucus for President were held today in your state for whom would you vote if the candidates were...



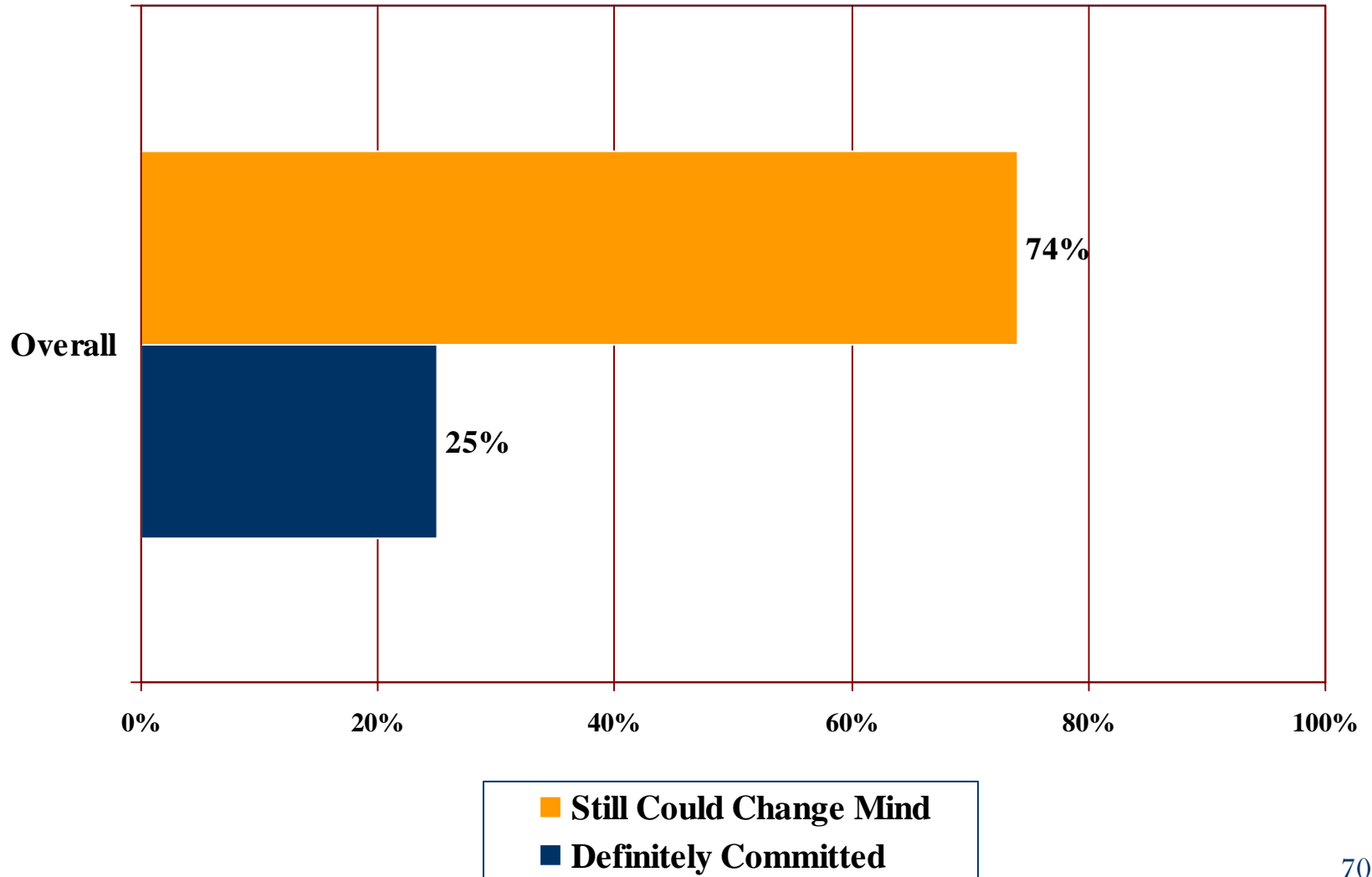
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Voter Commitment

Would you say that you are definitely committed to voting for your choice or might you still change your mind?



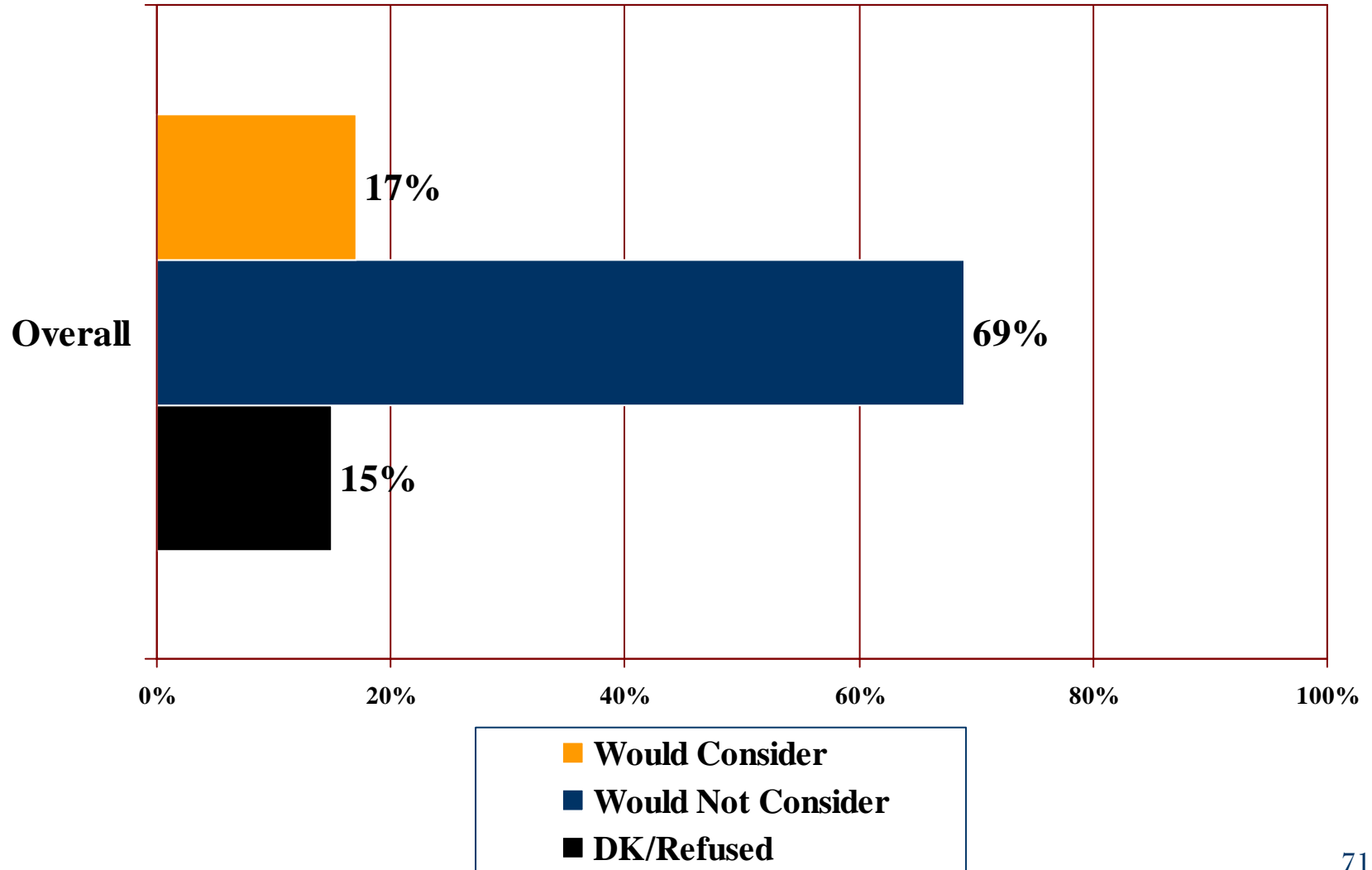
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Bloomberg Threat as Independent

How likely would you be to consider voting for New York City Mayor Michael Bloomberg if he ran as an Independent, 3rd party candidate for President and not as a Republican?



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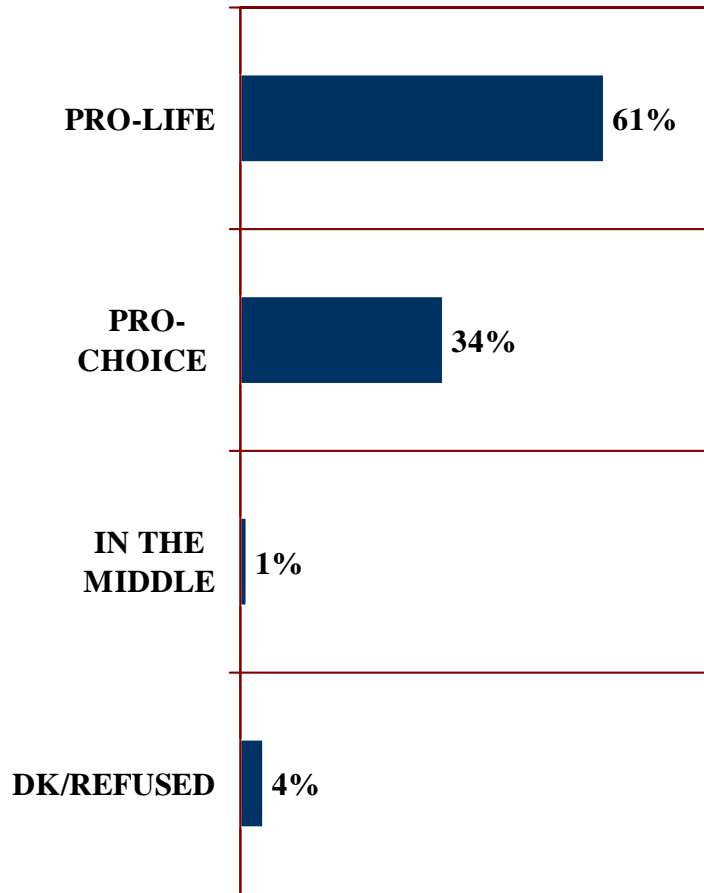
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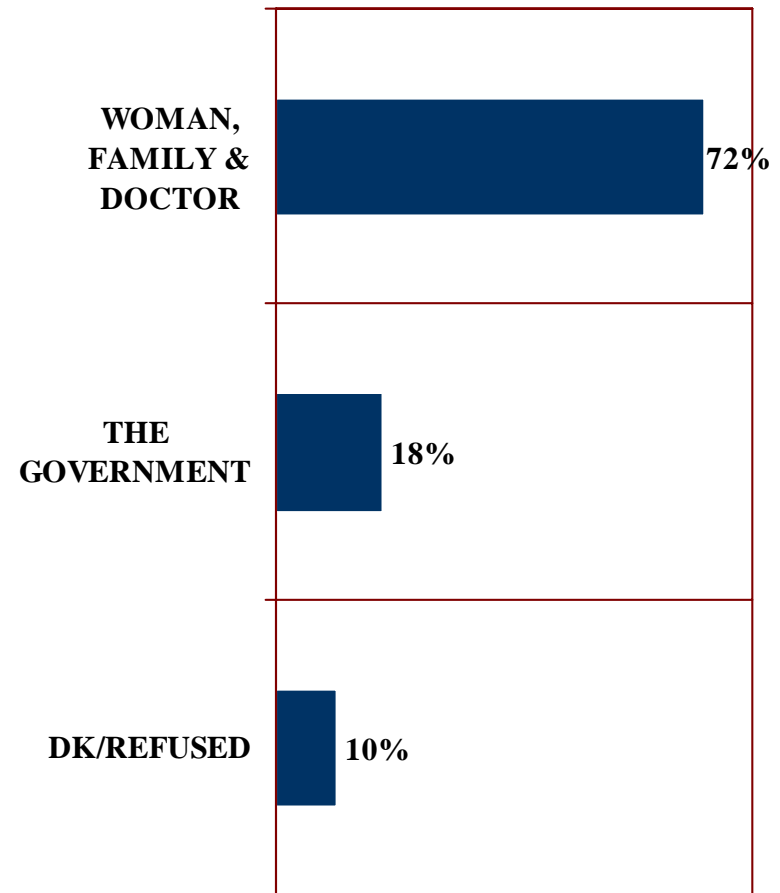
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PRO-CHOICE OR PRO-LIFE?



ABORTION: WHO SHOULD DECIDE?



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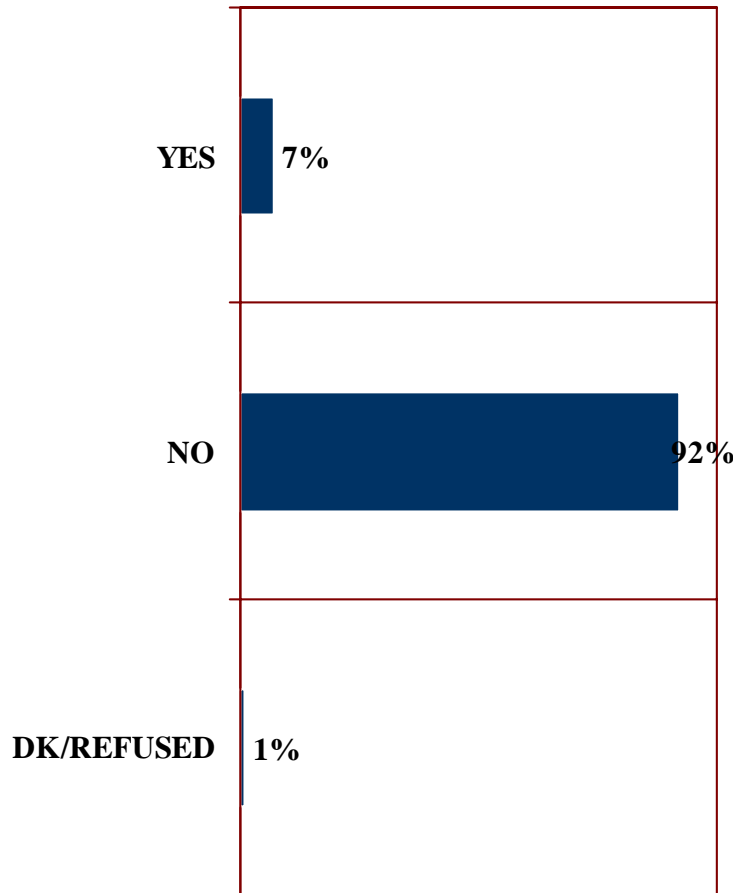
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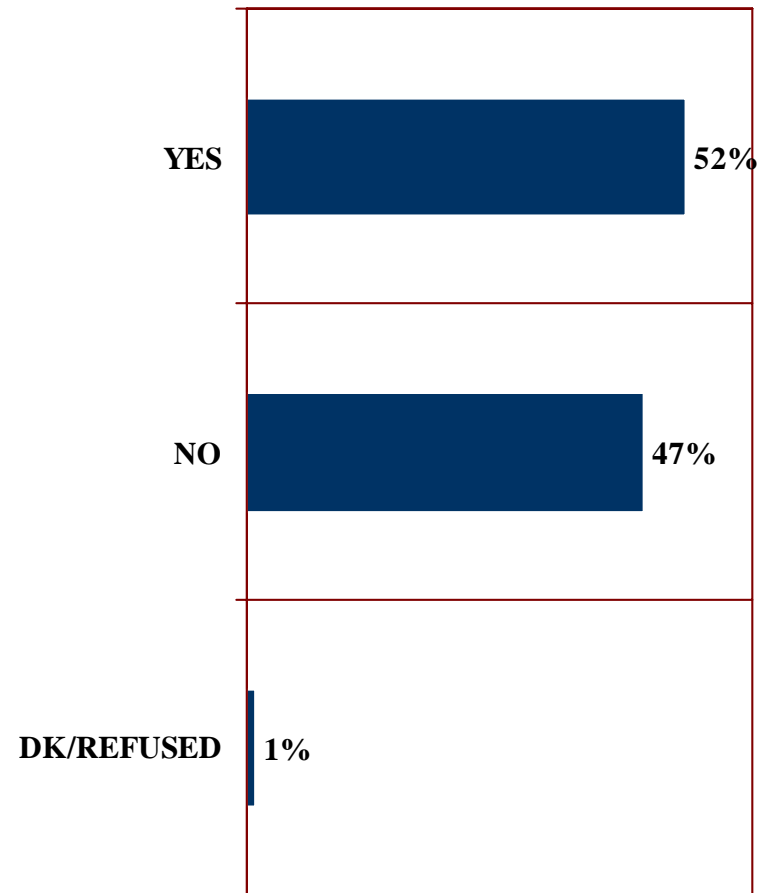
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HOUSEHOLD COUNTRY CLUB MEMBERSHIP?



SAM'S CLUB OR COSTCO SHOPPING?



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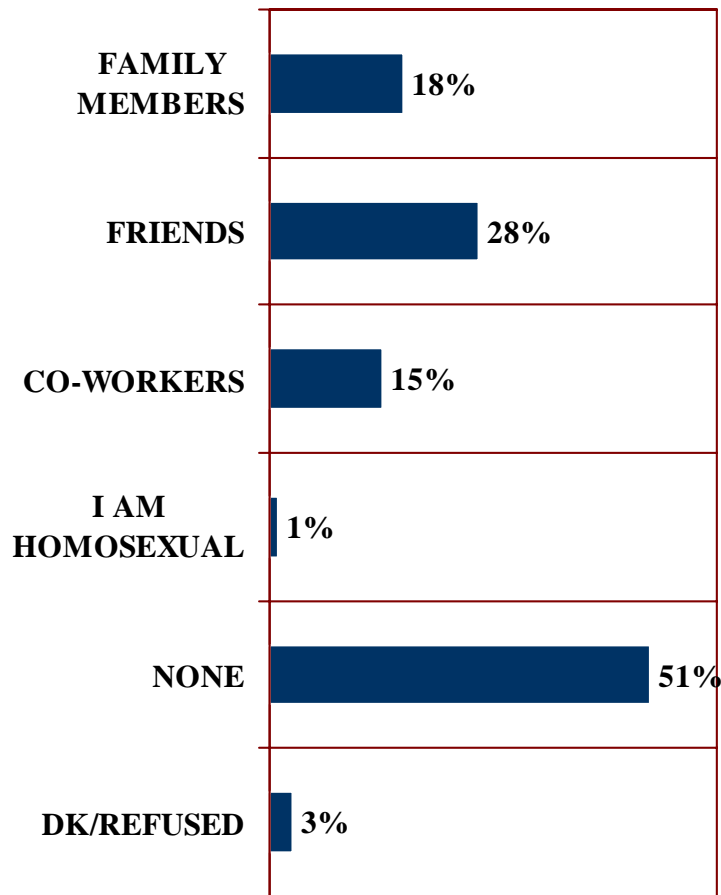
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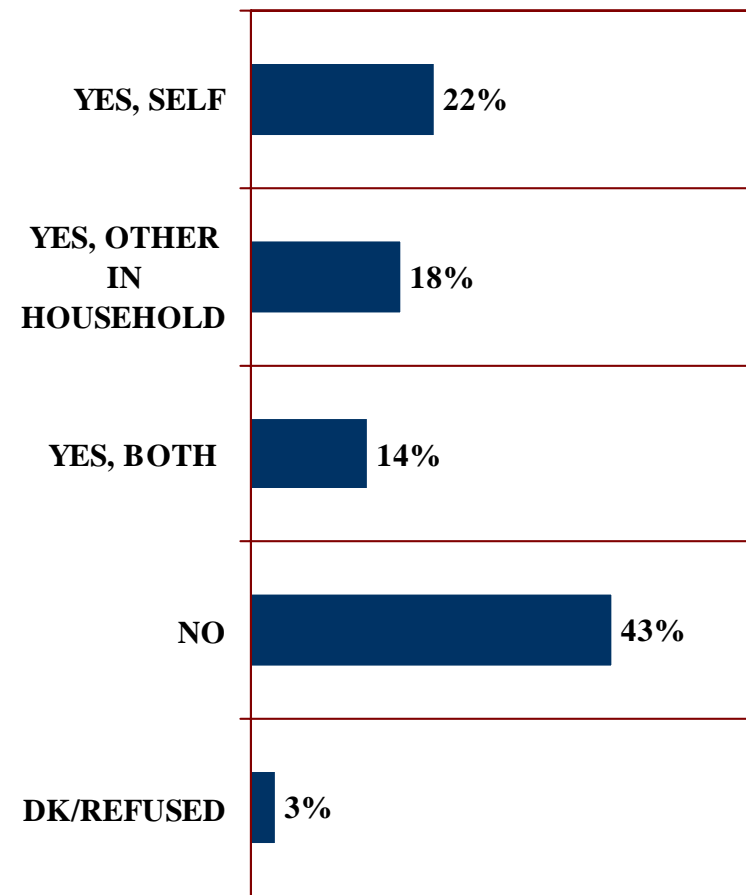
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GAY FRIENDS/FAMILY?



HOUSEHOLD GUN OWNERSHIP?



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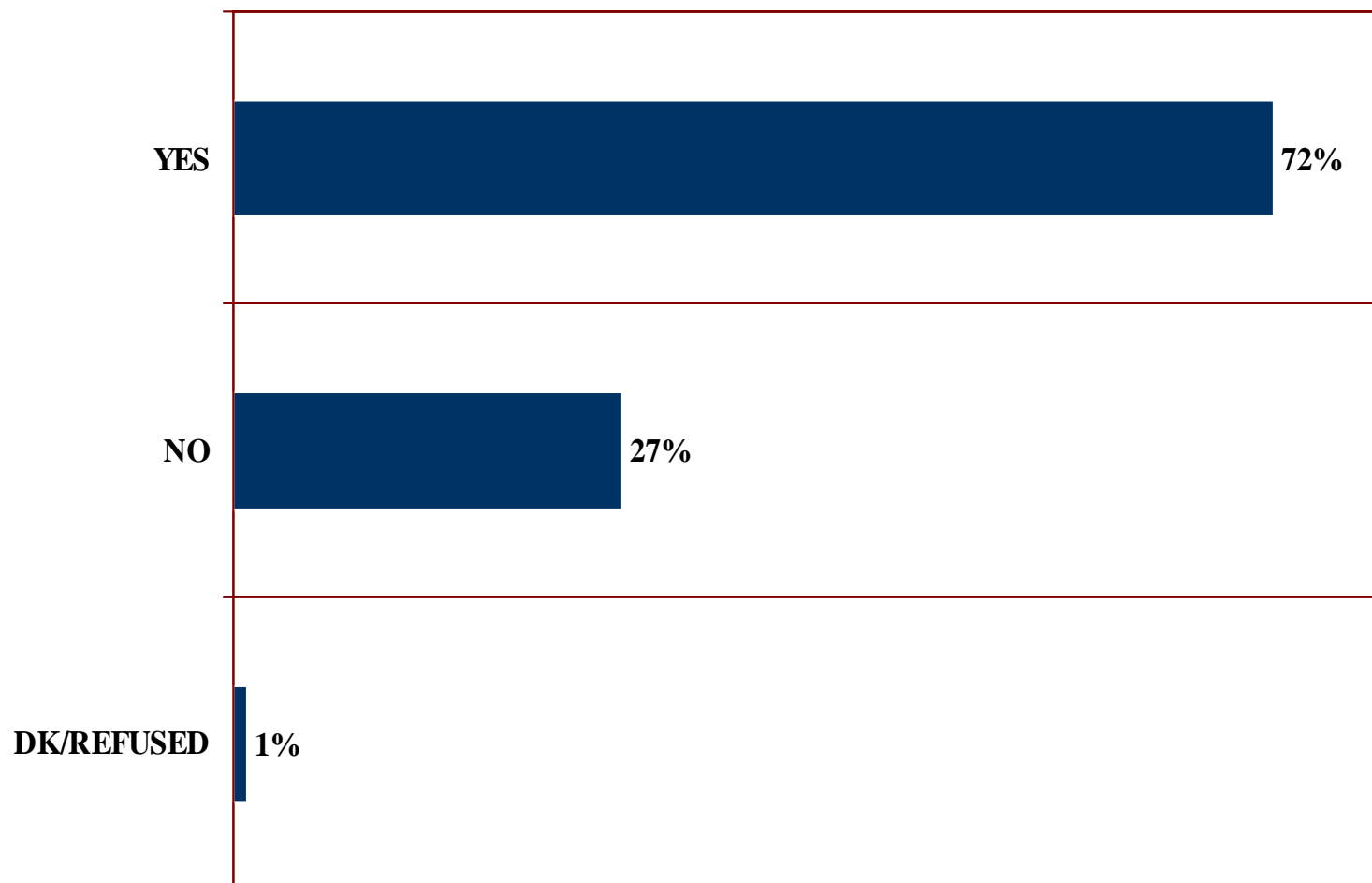
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MILITARY FRIENDS/FAMILY?



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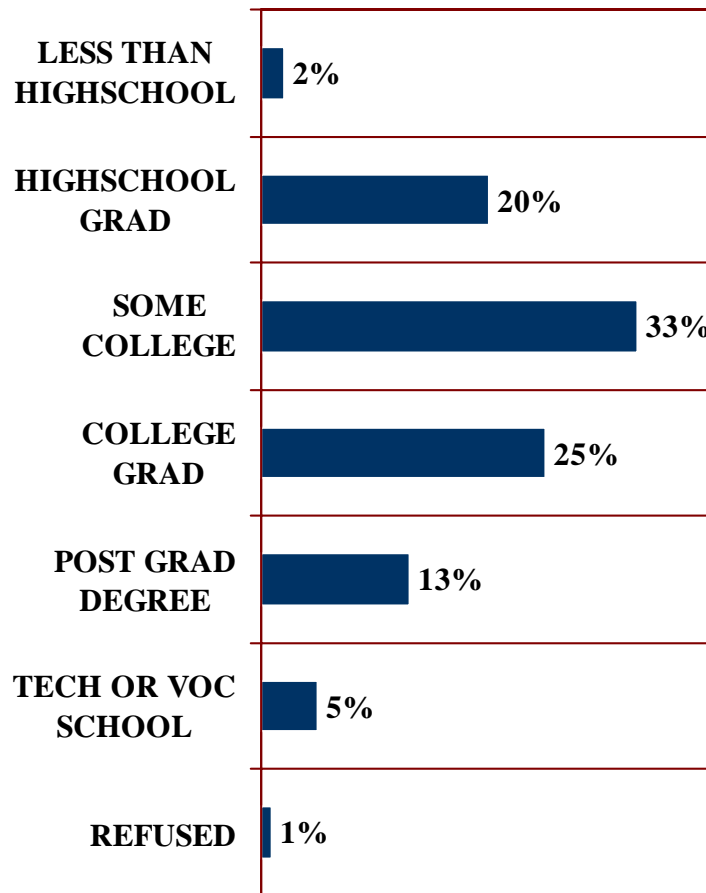
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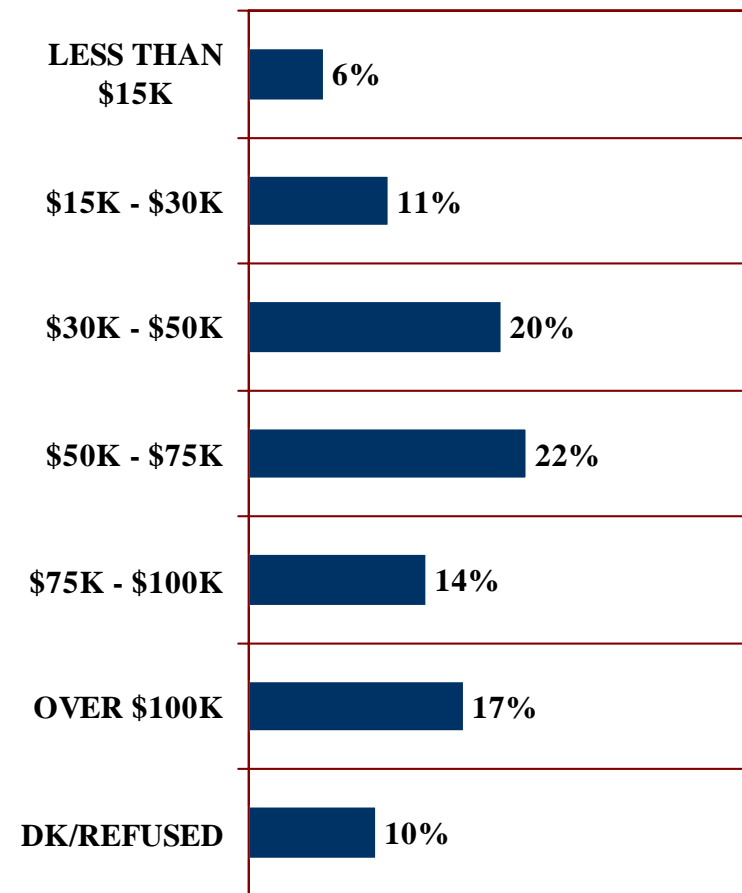
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COMPLETED FORMAL EDUCATION?



ANNUAL FAMILY INCOME?



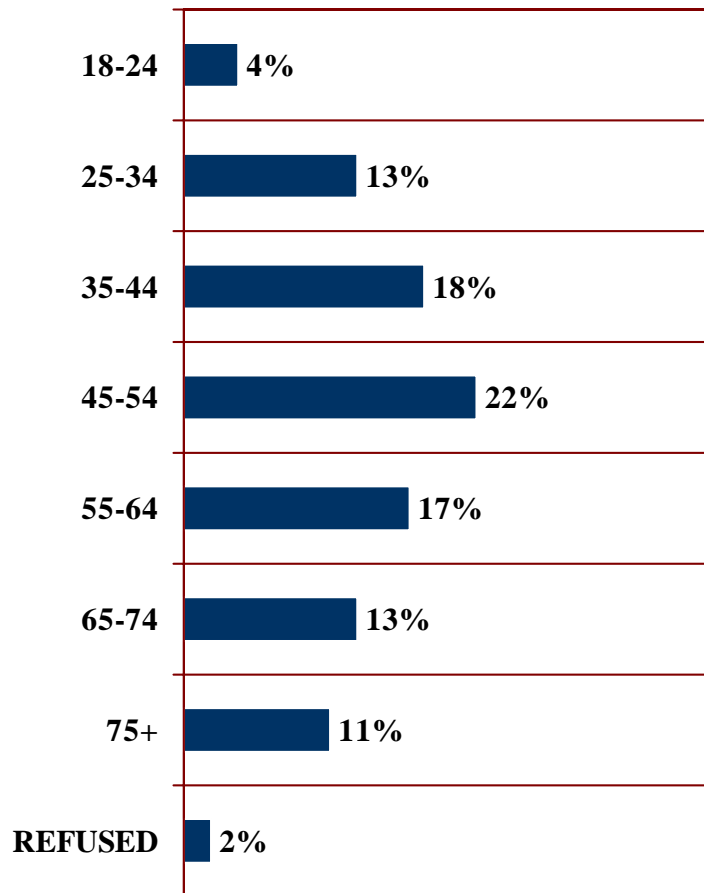
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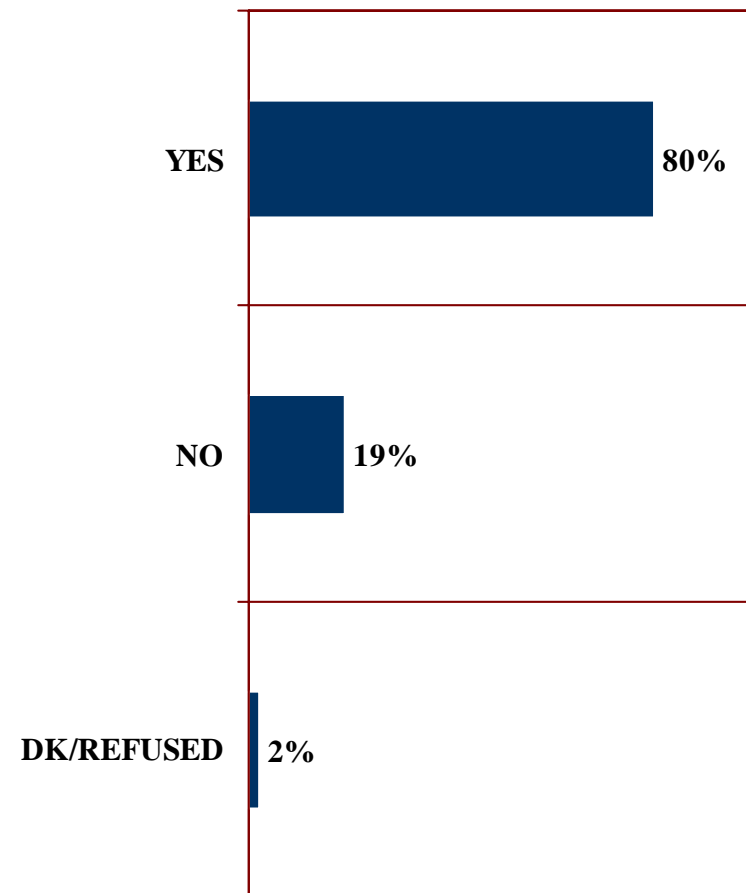
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AGE?



COMPUTER WITH INTERNET?



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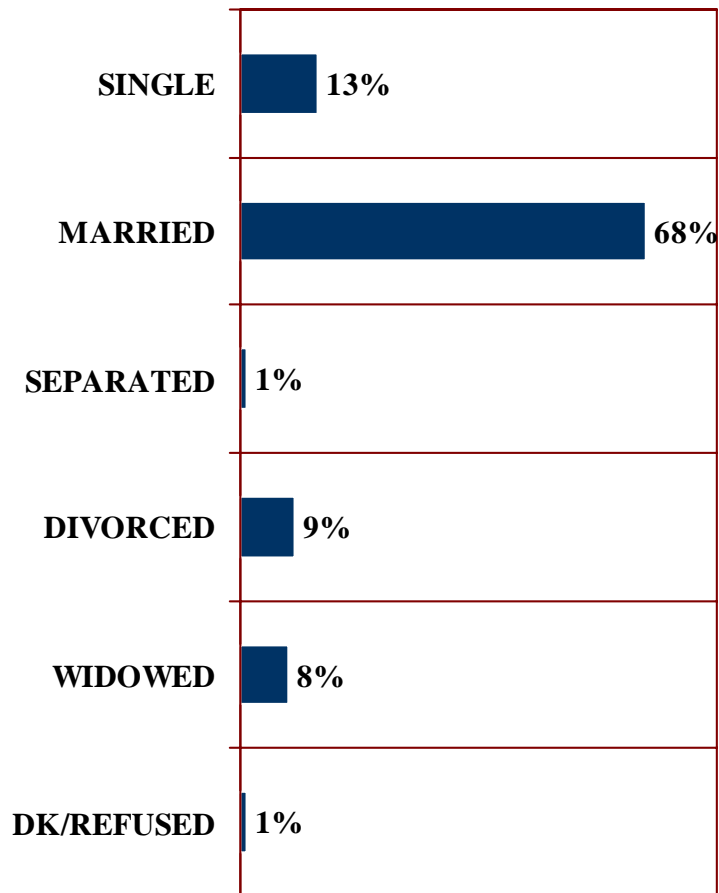
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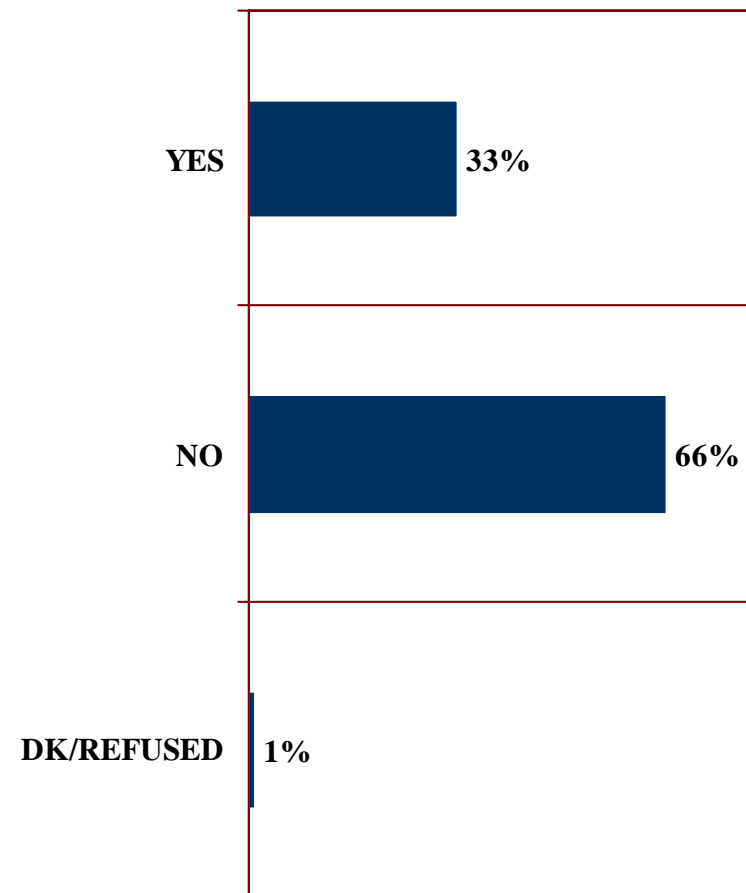
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CURRENT MARITAL STATUS?



HOUSEHOLD CHILDREN UNDER 18 YEARS ?



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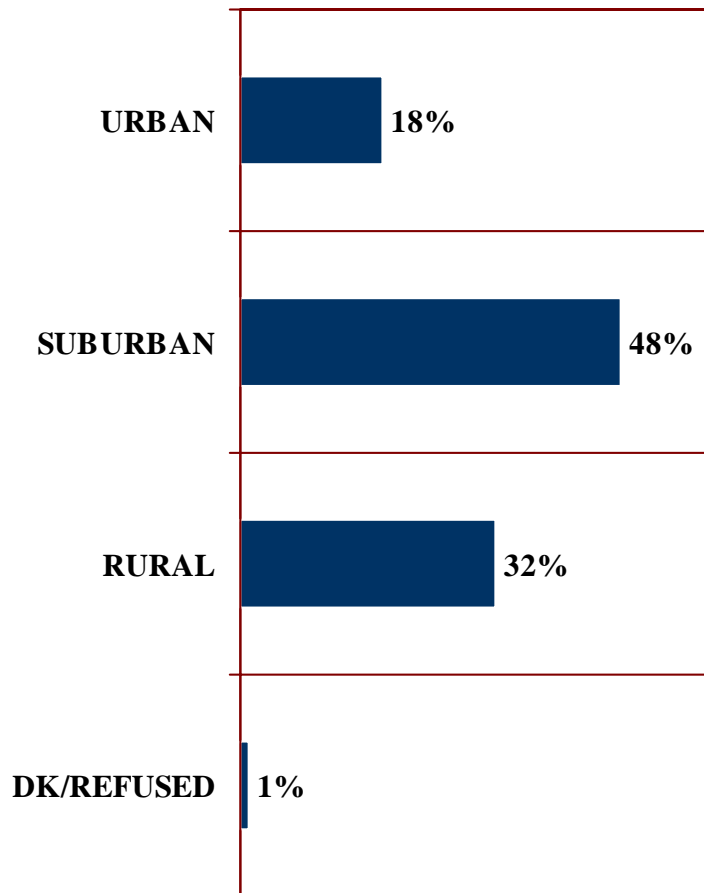
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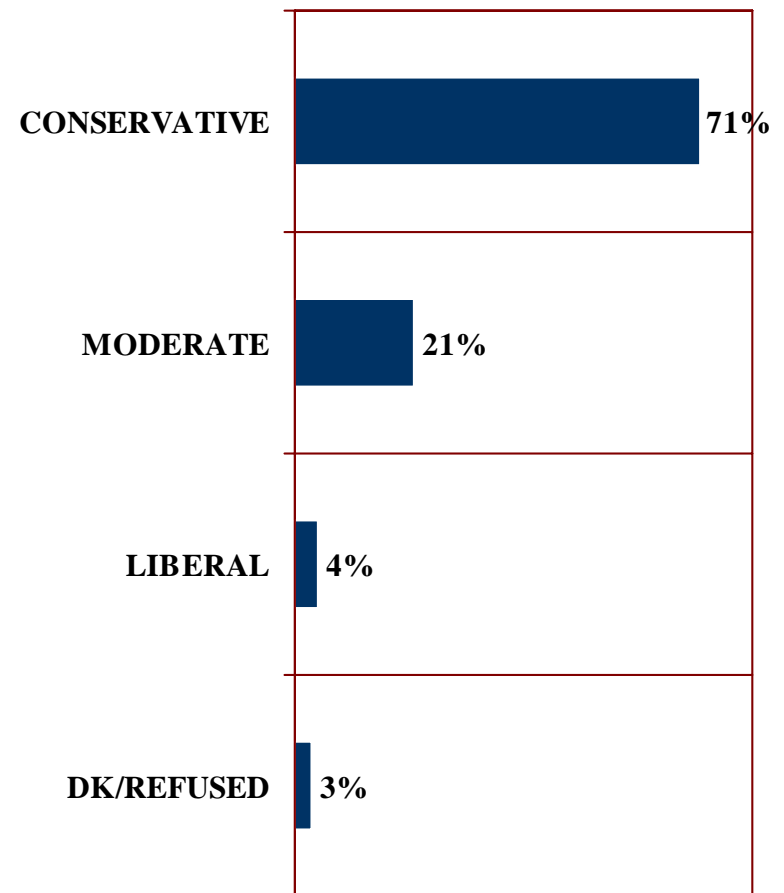
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AREA DESCRIPTION



SELF DESCRIBED IDEOLOGY?



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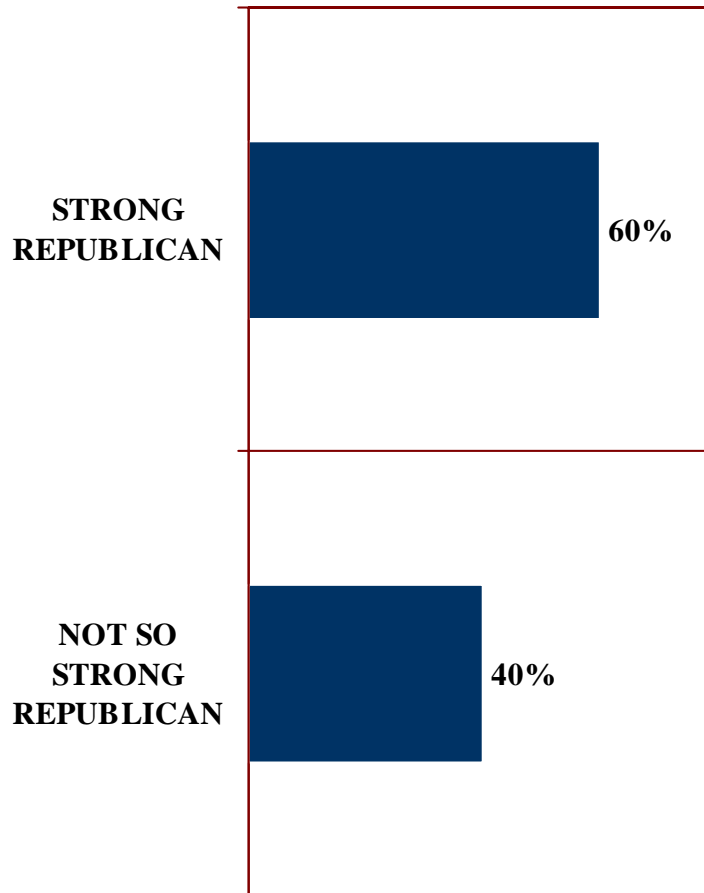
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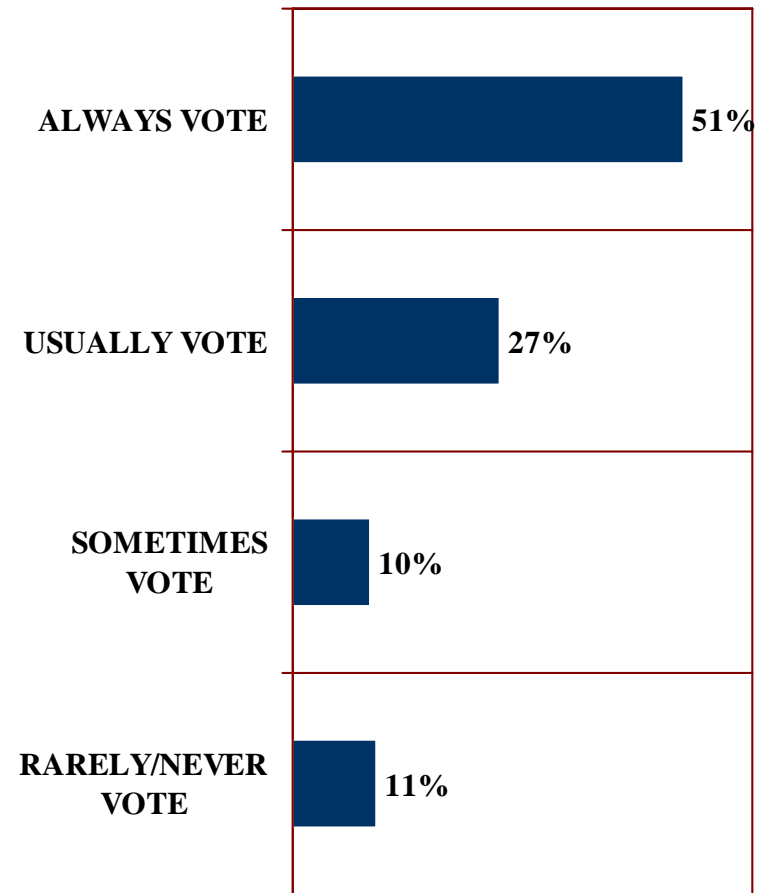
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GOP VOTER STRENGTH?



PAST PRIMARY ELECTION VOTE?



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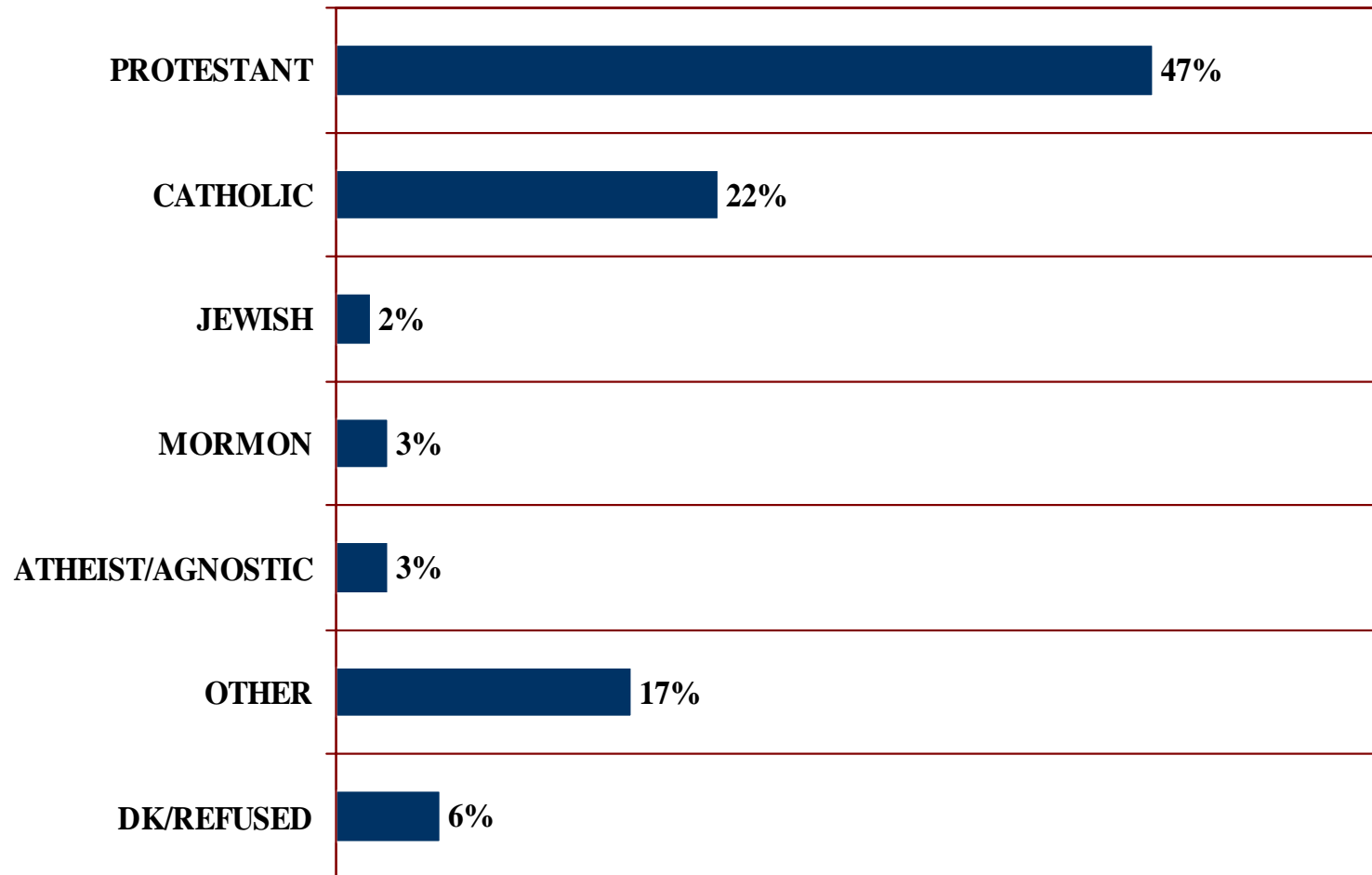
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RELIGION?



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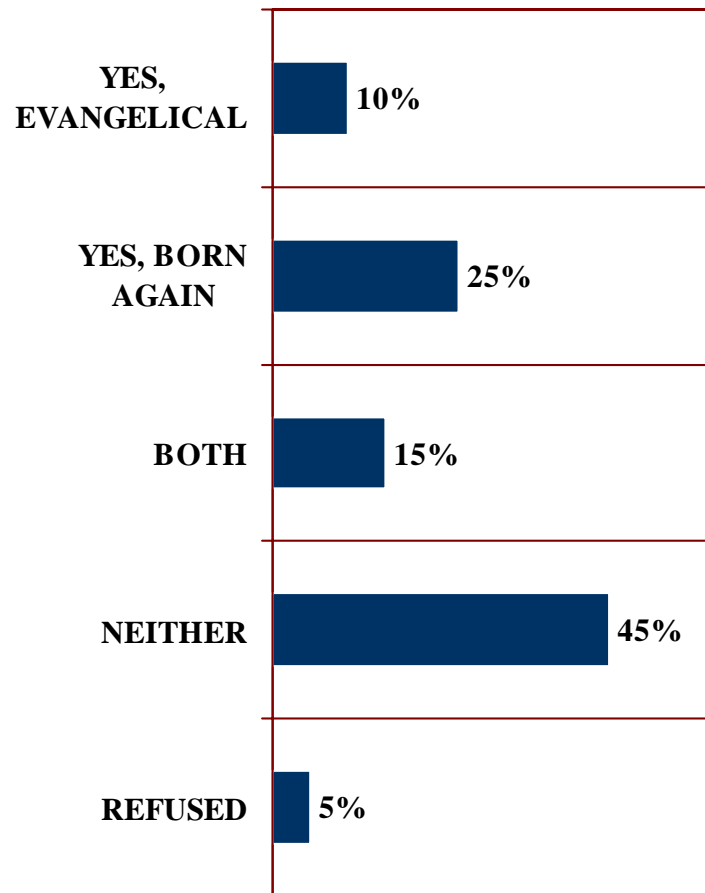
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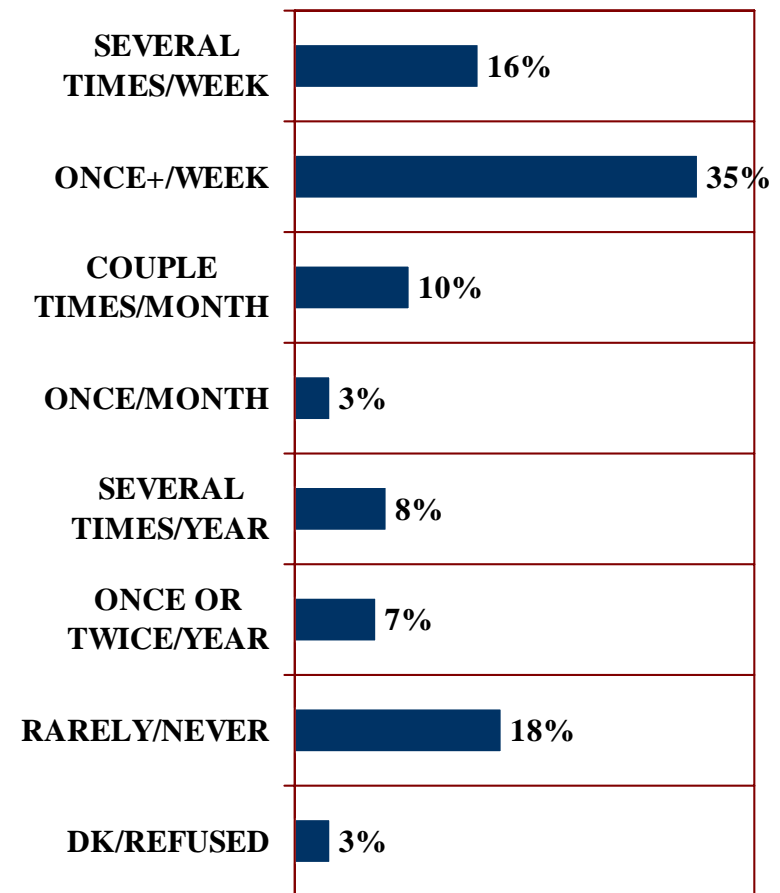
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BORN AGAIN CHRISTIAN?



CHURCH/PRAYER MEETING ATTENDANCE?



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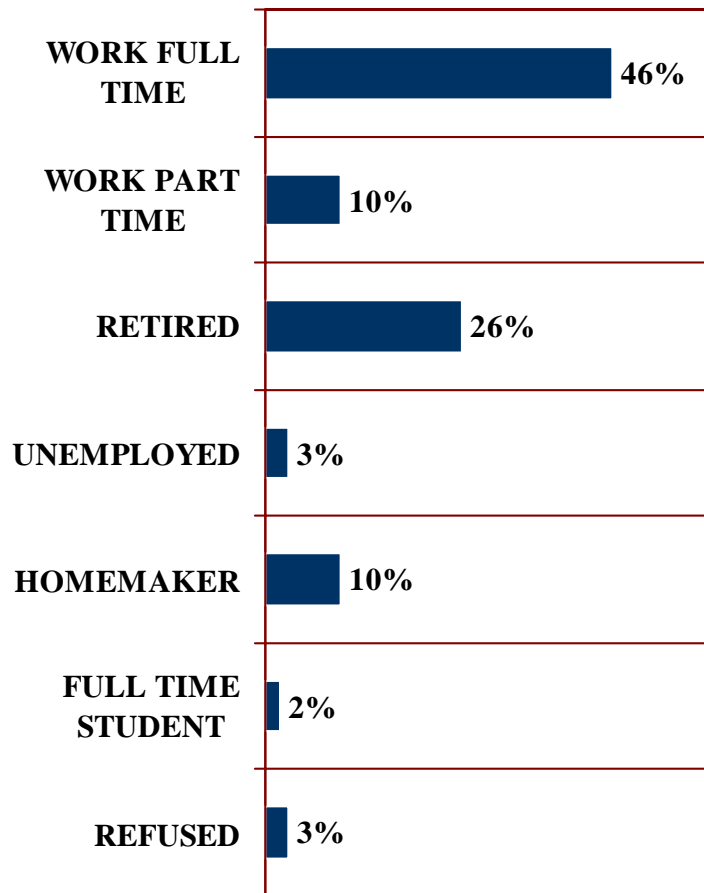
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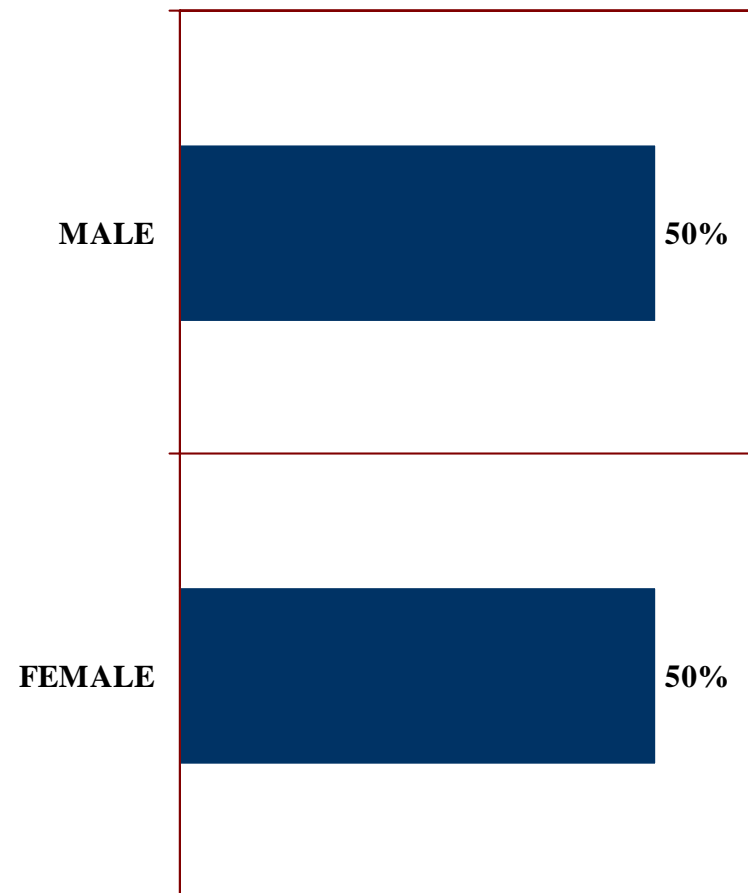
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CURRENT EMPLOYMENT SITUATION?



GENDER?



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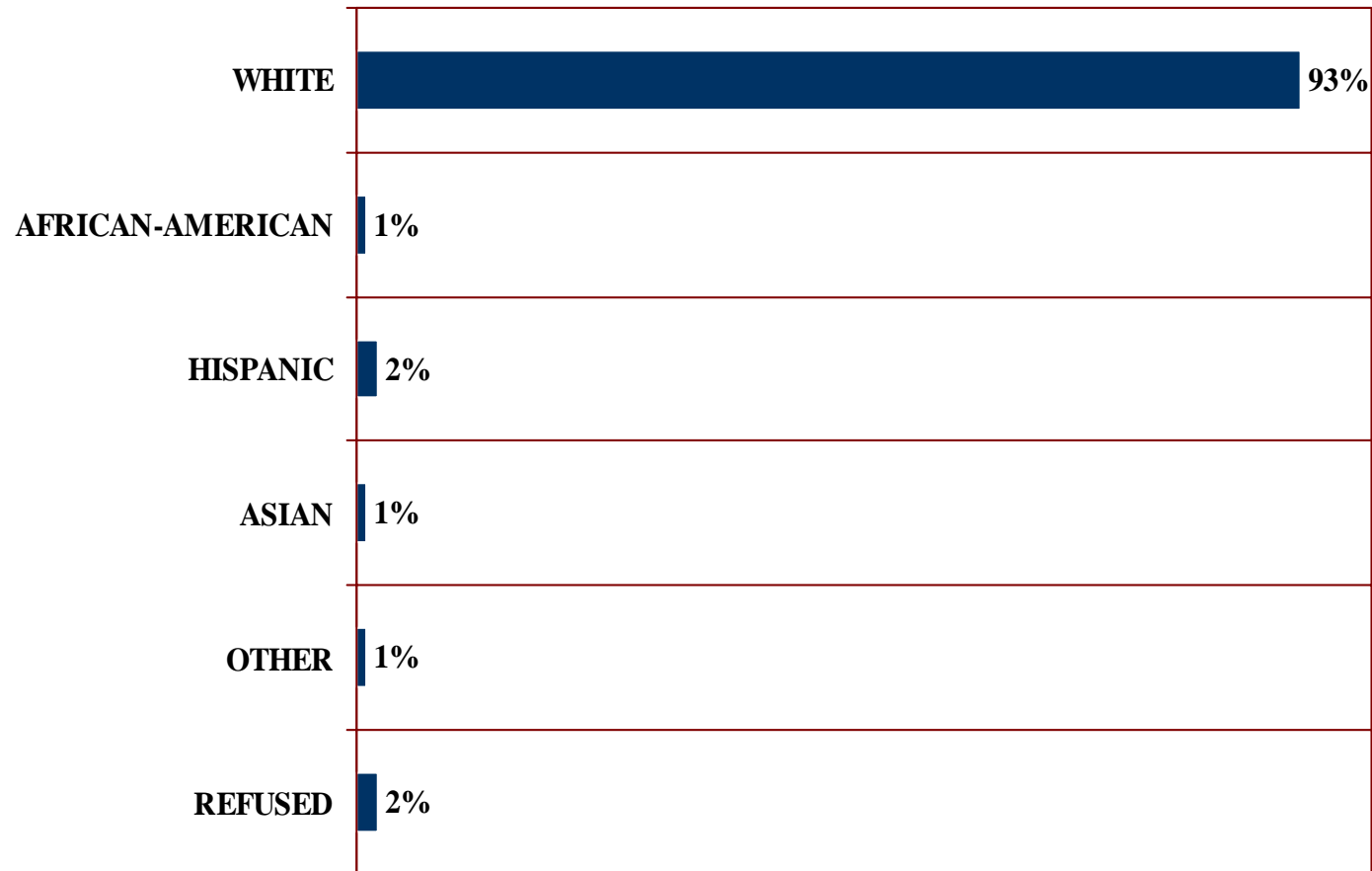
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MAIN RACIAL BACKGROUND?



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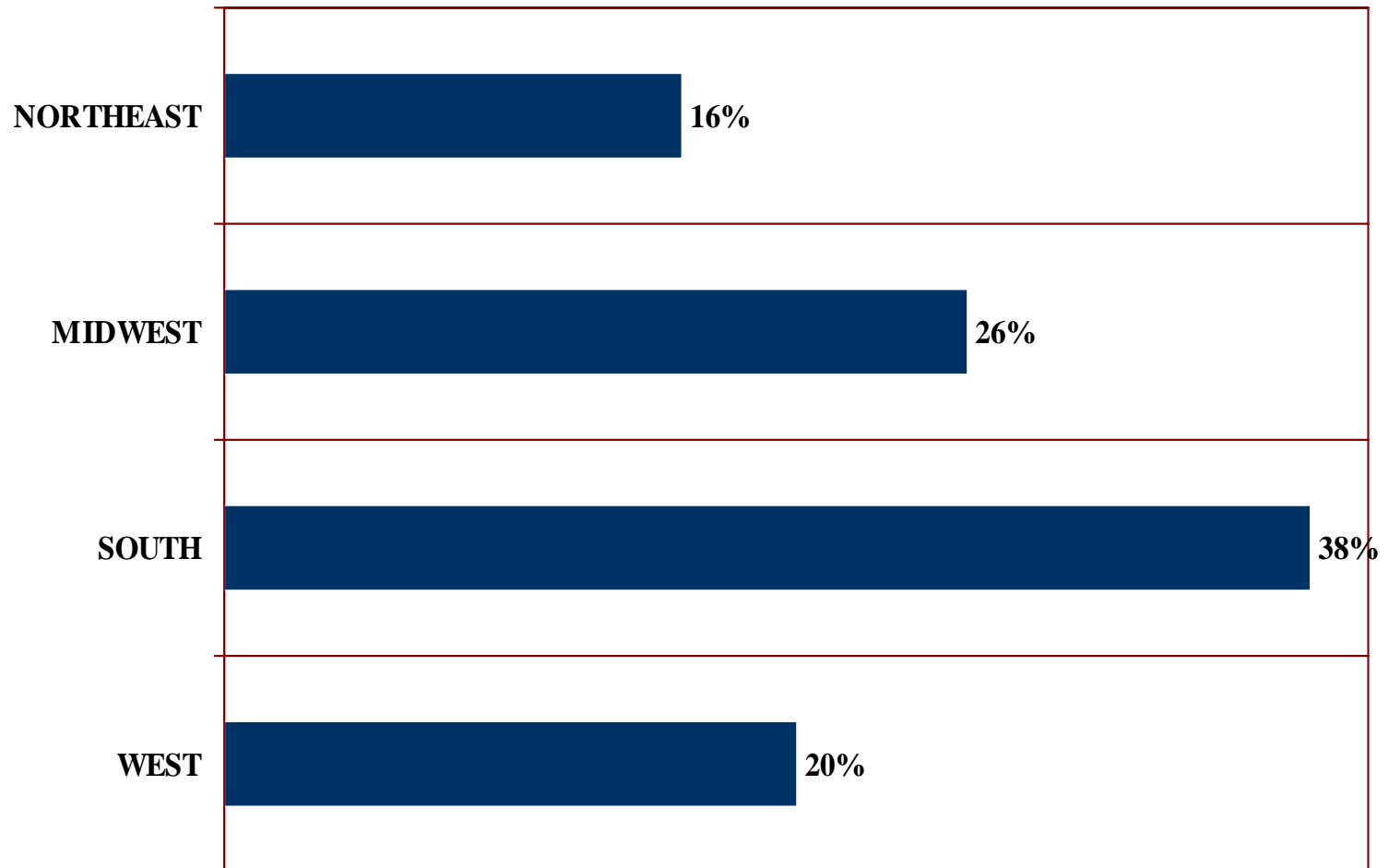
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4 PART REGION



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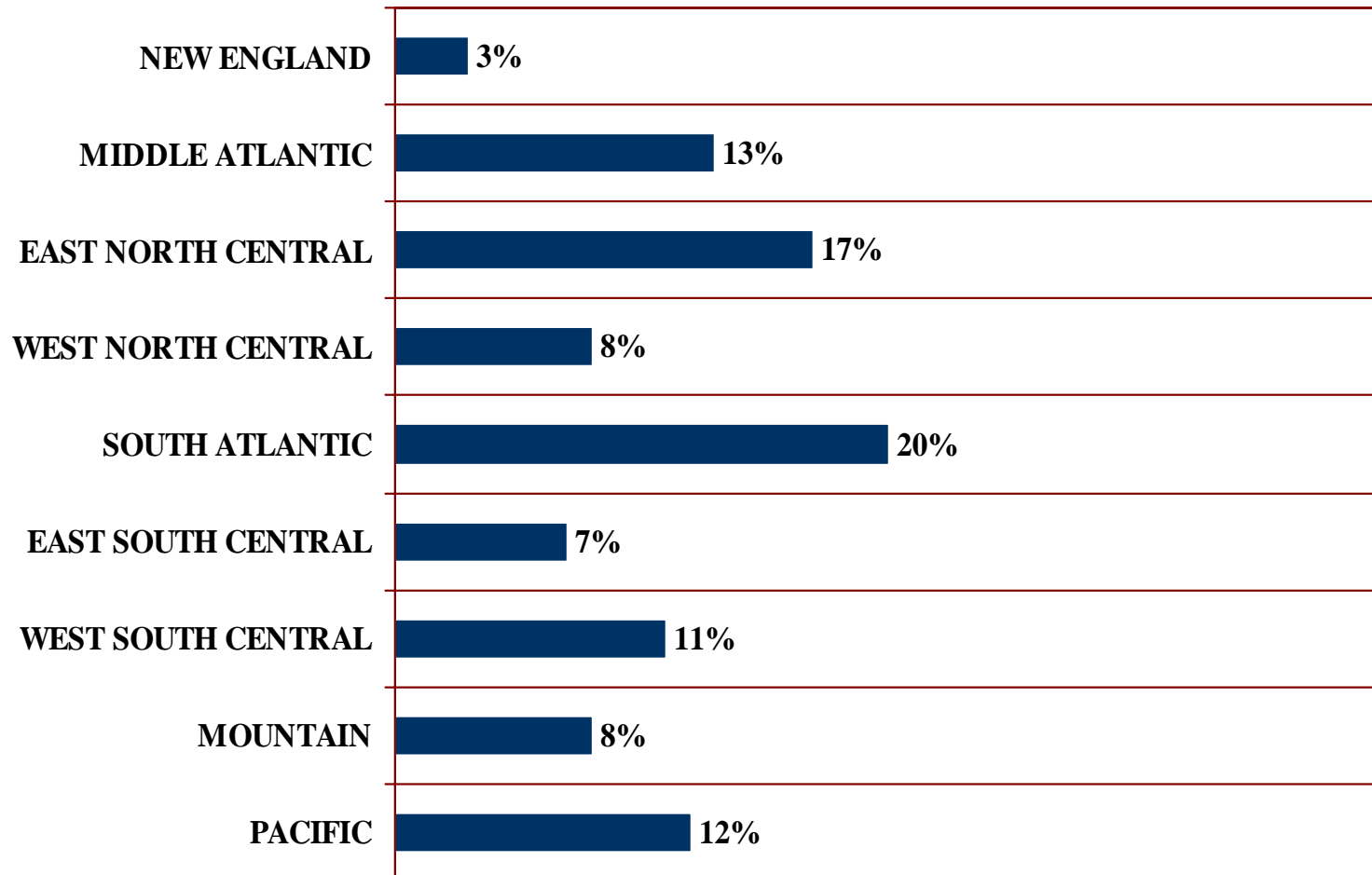
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9 PART REGION



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