

Mayoral Poll

Conducted for Capalino by the Honan Strategy Group

CAPALINO



June 14, 2021

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Overview



Overview

Honan Strategy Group conducted a survey on behalf of Capalino among likely New York City Democratic primary voters to understand their attitudes and perspectives on key issues.

Specifically, the aim of the survey was the following:

1. Measure the leading issues that voters want city government to address
2. Understand the mindset of voters towards recovery in the post-COVID climate
3. Measure support for each of the main candidates running for Mayor
4. Run a ranked-choice vote simulation of the mayoral ballot
5. Measure public attitudes towards restaurants and dining
6. Understand the willingness of the public to try recreational cannabis

Survey Methodology



Survey Methodology

- A total of 950 interviews were conducted among likely New York City Democratic voters. All interviewing was done via both landline and cell phone.
 - 750 interviews were conducted between May 26 and June 1, 2021.
 - In order to capture the changing dynamics of the race, we conducted 200 additional interviews with a shorter version of the survey between June 9 and June 10, 2021, post the AOC endorsement of Maya Wiley.
- All respondents were screened to be registered Democrats, and those names and numbers were drawn from a list of voters kept by Prime NY, with actual primary voting participation.
- The original interview length averaged 12 minutes in duration. For the additional interviewing, we used an abbreviated survey which was approximately 7 minutes in length.
- The overall margin of sampling error is = +/- 3.17% and larger among subgroups.
- Please note that numbers may add to +/- 100% due to rounding.

Survey Methodology

We employed a robust survey methodology in undertaking the survey to arrive at a statistically representative dataset.

1. Interviews were exclusively conducted via landline and cell phone.
2. We only interviewed voters who were registered Democrats.
3. We only interviewed Democratic primary voters who had recently participated in at least two recent Democratic Primary elections. These voters were identified using a voter list from Prime NY.
4. We asked several screening questions to weed out unlikely voters or casual voters.
5. The demographic and geographic profile of the voters surveyed matched the voter file, as well as the profile of past Democratic Primary voters.
6. We did not just ask who people planned to vote for. We also ran an actual ranked-choice vote simulation.

Executive Summary



Executive Summary

Here is what we know from the poll and the voter turnout history.

Compared to the NYC population overall, the June 22nd Democratic Primary electorate is:

- Older — 36% are over 65 years of age
- Overwhelmingly female — 61% are women
- White (35%) and Black (30%), and less Latino/Hispanic (22%).
- Overwhelmingly considers themselves to be progressive (49%) — although that does not carryover into who is winning the most votes in the ballot.
- Educated — 44% have at least a college degree
- Higher Income — 32% have a household income of over \$100K
- Catholic — 44%
- Brooklyn based (32%) and Queens (23%) have about as much weight as Manhattan (25%).

Executive Summary

- While the electorate identifies as progressive, the progressive candidates – Stringer, Morales, and Wiley - have struggled to connect and that is before the negative publicity/scandals for 2 of the 3 candidates.
- Furthermore, when we looked specifically at the AOC endorsement, we see that it had barely any impact on the ballot or overall trajectory of the race.
- An AOC endorsement is perceived as a win, but the reality is that it doesn't shift the vote in any meaningful way beyond the margin of error.

Executive Summary

This poll, along with several other public polls, shows Eric Adams leading the race for Mayor.

- Adams 28%
 - Yang 19%
 - Garcia 13%
 - Donovan 9%
 - Wiley 7%
 - Stringer 6%
-
- With so much buzz about the AOC endorsement of Maya Wiley, we re-fielded the poll to look at this specifically.
 - We began by asking whom AOC had recently endorsed in the Mayoral primary, and most (58%) were aware that it was Wiley.

Executive Summary

- We then asked whether AOC endorsing a candidate made them more or less likely to vote for that candidate.
 - 38% said it made them more likely
 - 18% said it made them less likely
 - 32% said it made no difference
 - 12% said they didn't know
- We then tested an “informed ballot” where we mentioned that AOC had endorsed Wiley, along with other leading progressives, like Elizabeth Warren and Jumaane Williams. Wiley goes up 4 points, which is negligible movement overall – and she moves only to being tied for third place.

	<u>Initial Ballot</u>	<u>Informed Ballot</u>	<u>Change</u>
Adams	28%	26%	-2
Yang	19%	15%	-4
Garcia	13%	11%	-2
Donovan	9%	9%	0
Wiley	7%	11%	+4
Stringer	6%	9%	+3

Executive Summary

- With 28% of the vote overall, Eric Adams is winning most voter segments.
- Adams does best with voters 35-49 years of age (he is winning 36% of the vote) and those with some college (33%). He is doing equally as well with white voters (29%) as he is doing with Black voters (29%), and about the same with Latino voters (25%).
- Adams is doing best with moderate voters (29%), but also winning those who are ideologically liberal (27%) and even those who are very liberal (27%).
- Yang has his largest lead with voters 18-34 – winning 27% of their votes, but they are the smallest share of the electorate and only represent half as many voters as those over 65 years of age.
- Adams' support is strongest in Brooklyn (he is winning 31% of the vote) and in Queens (33%).
- While the sample size is relatively small, Yang is winning 31% of Asians to Adams 30%.

Executive Summary

- The narrative that Eric Adams is leading because of the crime issue doesn't play out in our survey.
- We presented a series of issues and we asked voters to tell us which area they are most looking for the city to make progress in, as it rebuilds in the aftermath of COVID.
- Crime is certainly an important issue, cited by 11%, but fewer cite crime relative to housing and affordable housing (19%), the economy and jobs (15%), and education and schools (12%).

Executive Summary

- When we examine voters who cite crime as the issue they most want city government to address, we see that Adams is in a dead heat with Yang, among these voters.

	<u>Top Issue Cited:</u>			
	Housing	Economy	Education	Crime
Adams	28%	32%	22%	21%
Yang	19%	18%	24%	23%
Garcia	15%	10%	8%	14%

Executive Summary

- Regarding ranked-choice voting, we see that a significant number of voters do not have an opinion about who they will vote for beyond their second choice.
- The likely result of ranked-choice voting is that it will give additional political power to voters who are informed about RCV and take the time to go through and vote for Mayor, Comptroller, Borough President, and City Council.
- In our RCV simulation, Eric Adams ultimately bests Andrew Yang.

Executive Summary

- In terms of the mood, it is clear you cannot hold down New Yorkers or hold them back.
- The clear message from voters is a very strong sense of optimism about our future and the city's recovery from COVID.
- Here is some of what we found:
 - 93% are optimistic about New York City's recovery from COVID.
 - 92% are optimistic about NYC's future.
 - 92% agree that while the city was very hard hit by the pandemic, they always knew NYC would recover.
 - 81% agree they would rather live in NYC than just about any other place.
 - 72% believe that the city's best days are yet to come, versus being behind us.
 - 73% believe that with NYC set to receive billions of dollars of federal aid to help rebuild the city after COVID, they expect that NYC will be rebuilt better and stronger.

Executive Summary

- One of the industries in New York that was particularly devastated by the pandemic was the restaurant industry, so we wanted to pose some questions about the recovery of that industry.
- We found that:
 - 90% believe that for NYC to recover, our restaurants and nightlife must be at the core of our recovery – eating, drinking, and socializing is a part of our DNA.
 - 89% believe that bringing tourists back to eat at restaurants across NYC is critical to NYC's recovery.
 - 83% agree that keeping outdoor dining enhances neighborhoods and communities.
 - 82% believe that New Yorkers should go out and eat to support an industry that was crushed by the pandemic and doing so helps put money directly into the pockets of working people.

Executive Summary

- Last, in terms of cannabis, now that recreational use has been legalized, we sought to understand interest in consumption.
- We found that just 26% — one in four New Yorkers — are willing to try recreational cannabis.

State of Optimism



Outlook on NYC

- We began by asking attitudes towards NYC today, looking back during the pandemic, and looking ahead to the city's recovery.
- We posed the following questions:
 - To what extent would voters agree or disagree that they would rather live in NYC than any other place?
 - To what extent would voters agree or disagree that while NYC was hit very hard by the pandemic, they always knew the city would recover?
 - Are the city's best days ahead of us or behind us?
 - How optimistic are voters about the city's future and our recovery from COVID?
 - Do voters expect that the city will be rebuilt better and stronger than it was before COVID?

Outlook on NYC

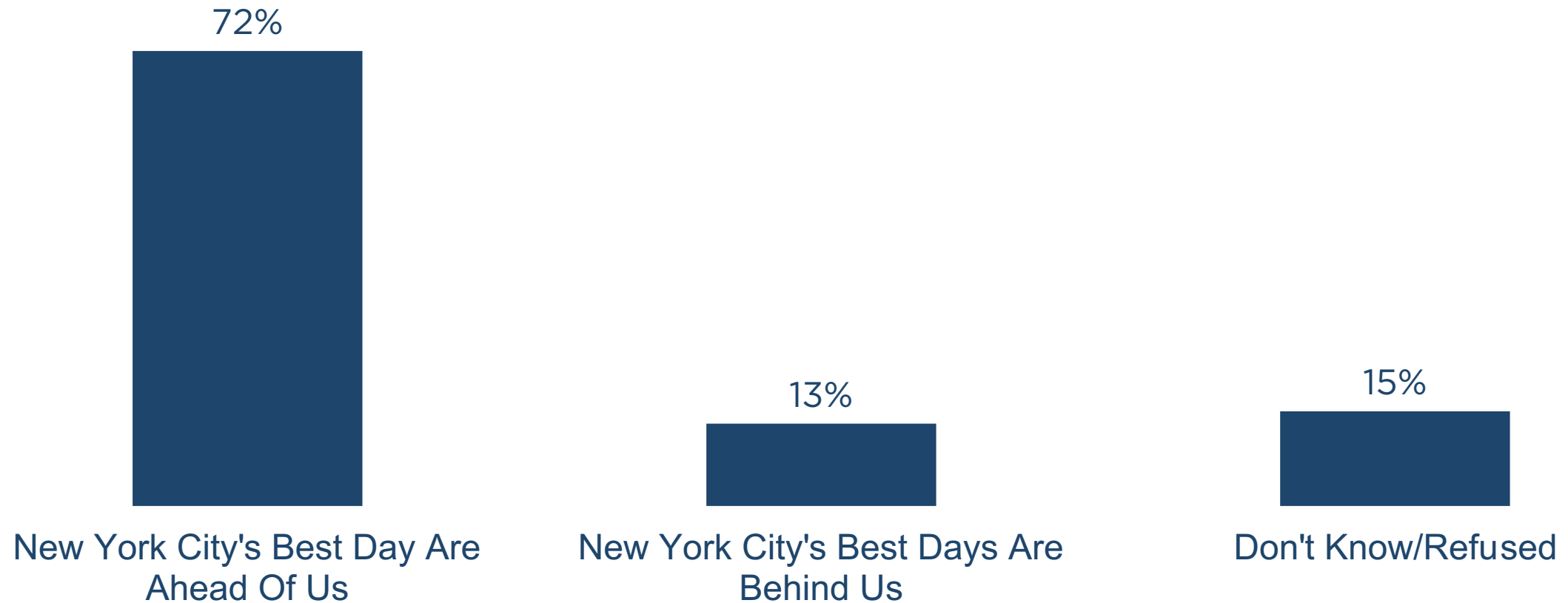
- In terms of the pandemic, nine in ten believe the city was hit very hard, but they always knew New York City would recover, with two-thirds strongly agreeing with this statement.
- In addition, the majority of those surveyed agree that they would rather live in New York City than just about any other place, with two-thirds strongly agreeing with this statement.

	Strongly Agree	Strongly + Somewhat Agree	Strongly + Somewhat Disagree	Don't Know/ Refused
New York City was hit very hard by the pandemic, but I always knew New York City would recover.	67%	92%	6%	2%
I would rather live in New York City than just about any other place.	67%	81%	18%	1%

Question 6 + 7: Please tell me whether you agree or disagree with each of the following statements.

Outlook on NYC

- When asked whether our best days are ahead of us or behind us, approximately seven in ten say that NYC's best days are ahead of us. Only approximately one in four say that our best days are behind us, or they don't know.



Question 8: Which statement do you agree with more?

Overall Optimism Towards New York City's Future

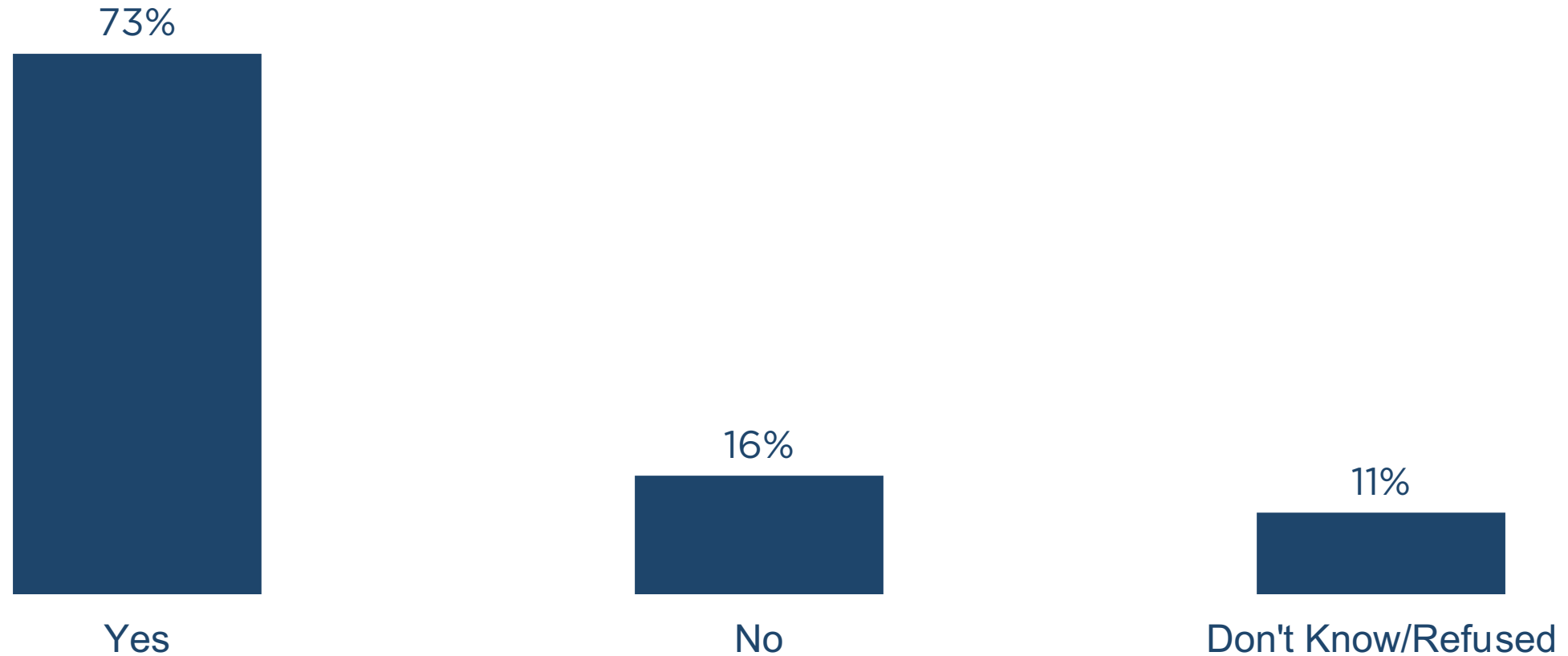
- Voters are optimistic about New York City's recovery from COVID, and they are optimistic about New York City's future overall.

	Very Optimistic	Very + Somewhat Optimistic	Not Very + Not Very Optimistic	Don't Know/ Refused
How optimistic are you about New York City's recovery from COVID?	58%	93%	7%	1%
How optimistic are you about New York City's future?	55%	92%	6%	2%

Question 9: How optimistic are you about New York City's future?/Question 10: How optimistic are you about New York City's recovery from COVID?

New York City's Future Post-COVID

- Knowing that the city is set to receive billions of dollars in federal aid, seven in ten expect NYC to rebuild stronger and better.



Question 11: With New York City set to receive billions of dollars of federal aid to help rebuild the city after COVID, do you expect New York to be rebuilt better and stronger than it was before COVID?

Top Issues

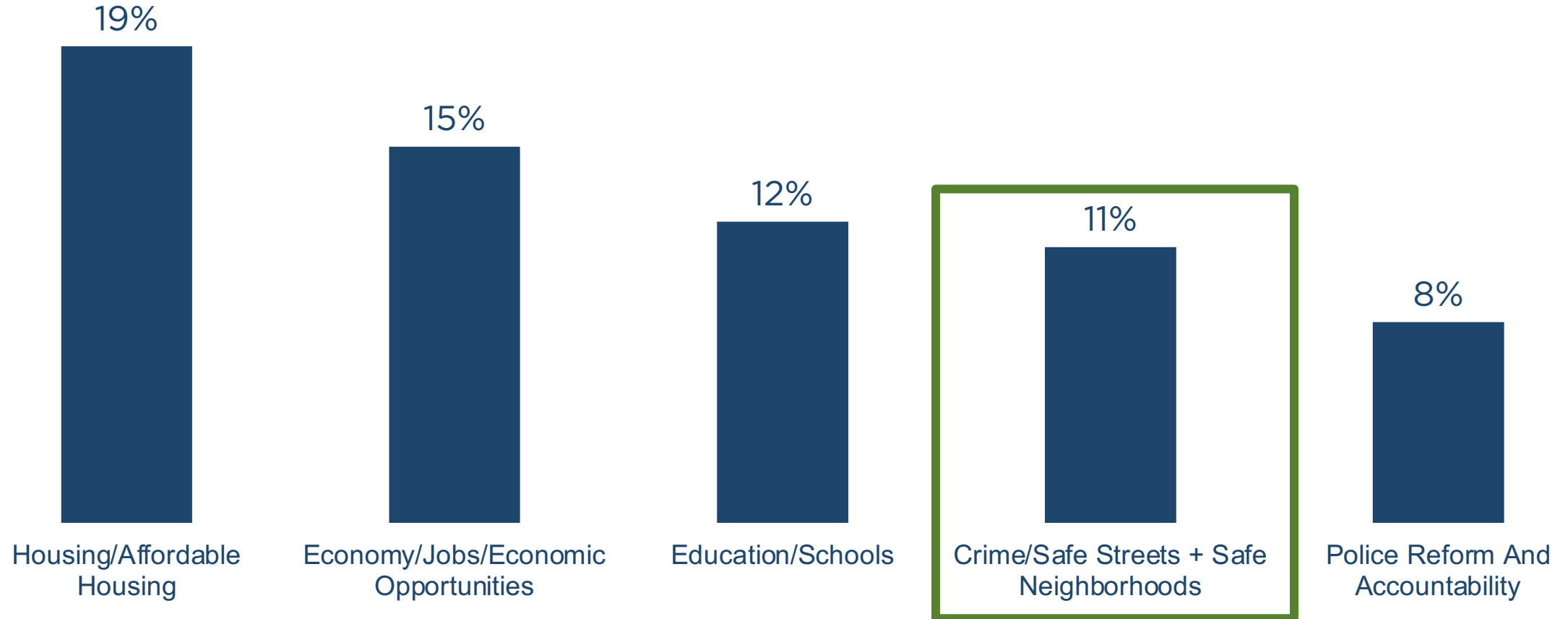


Top Issues

- Next, we asked respondents about the area that they are most looking for city government to make progress in, as the city looks to rebuild in the aftermath of COVID.
- The top issues cited were:
 - Housing and affordable housing – 19%
 - The economy and jobs – 15%
 - Education and schools – 12%
 - Crime, safe streets, and safe neighborhoods – 11%
 - Police reform and accountability – 8%

Top Issues

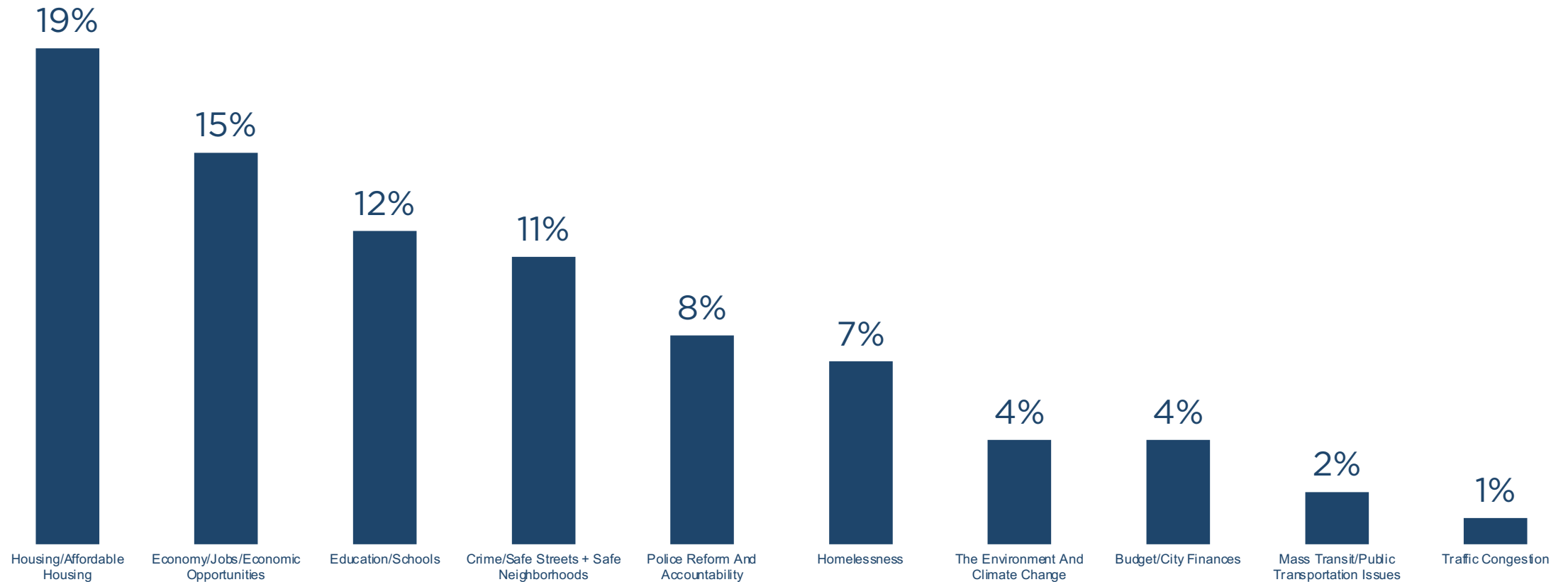
- Housing was the leading issue that voters are looking for city government to make progress on.



Question 12: As the city looks to rebuild in the aftermath of COVID, what area are you most looking for city government to make progress in?

Top Issues

- Here is the full list of issues that we gathered public perspectives on.



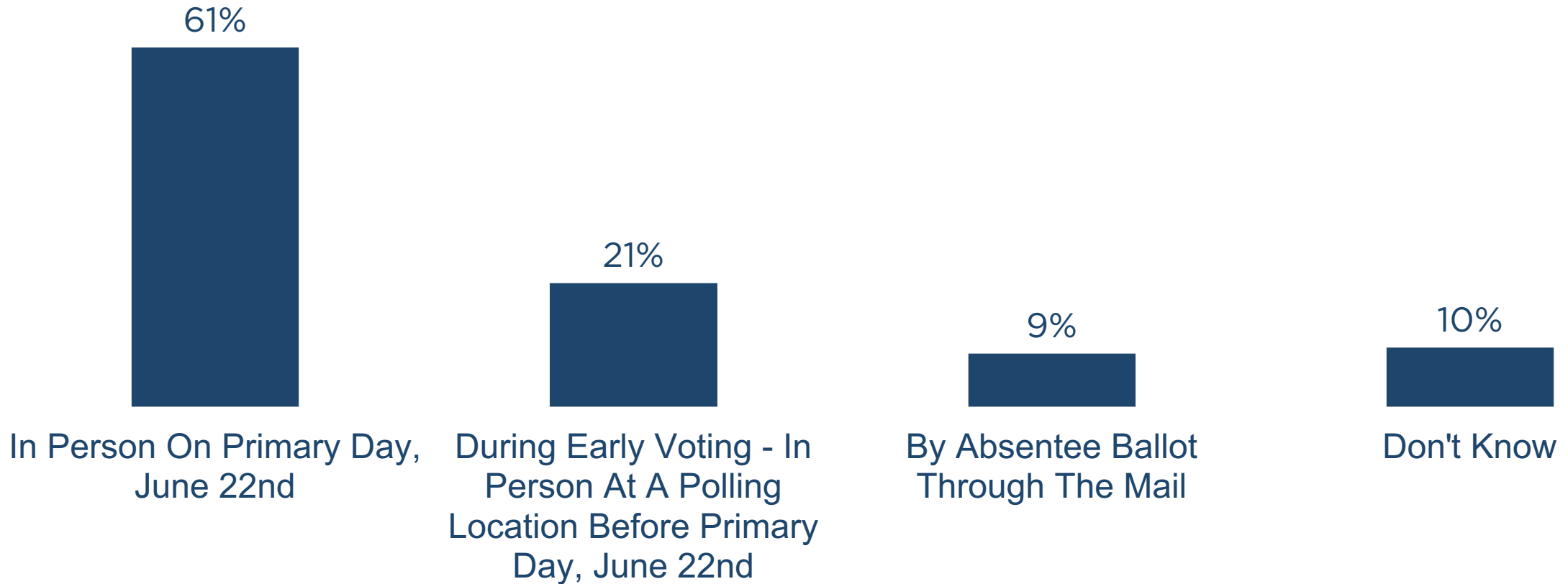
Question 12: As the city looks to rebuild in the aftermath of COVID, what area are you most looking for city government to make progress in?

Mayoral Race



Method for How Intend to Vote in the Primary

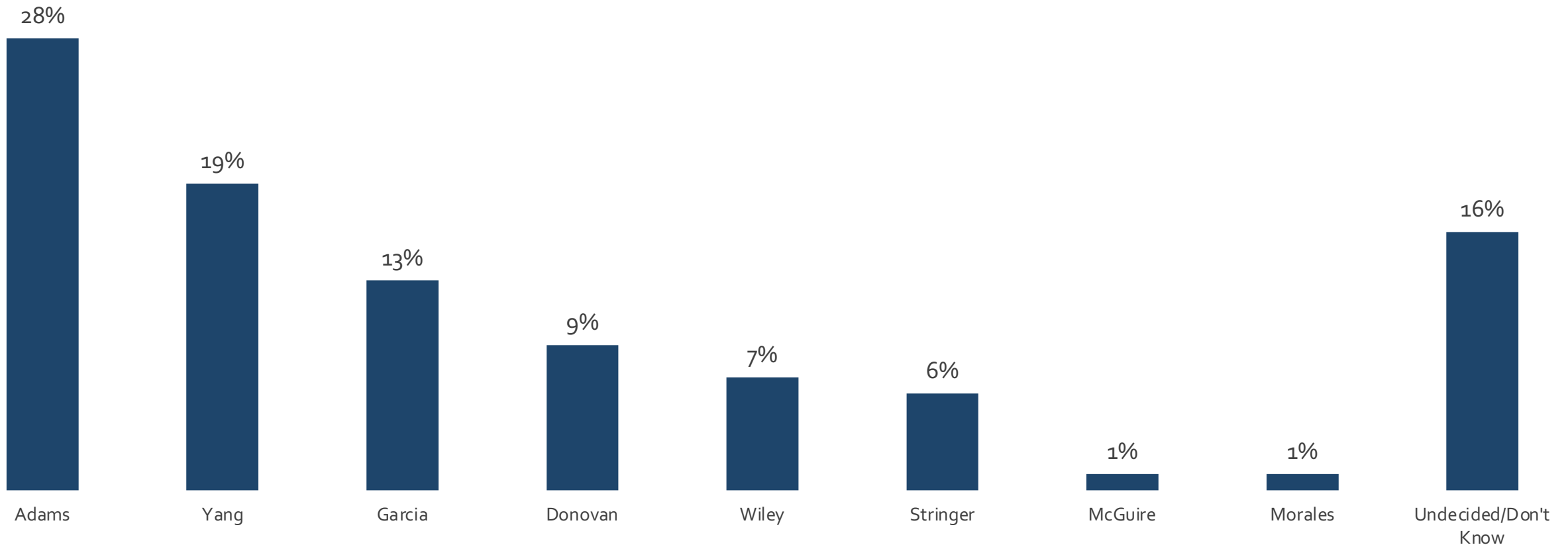
- The majority of voters plan to vote in-person on Primary Day, while two in ten plan to vote during early voting. Approximately one in ten plan to vote via absentee ballot.



Question 5: How do you intend to vote in the Democratic Primary this June?

Mayoral Ballot

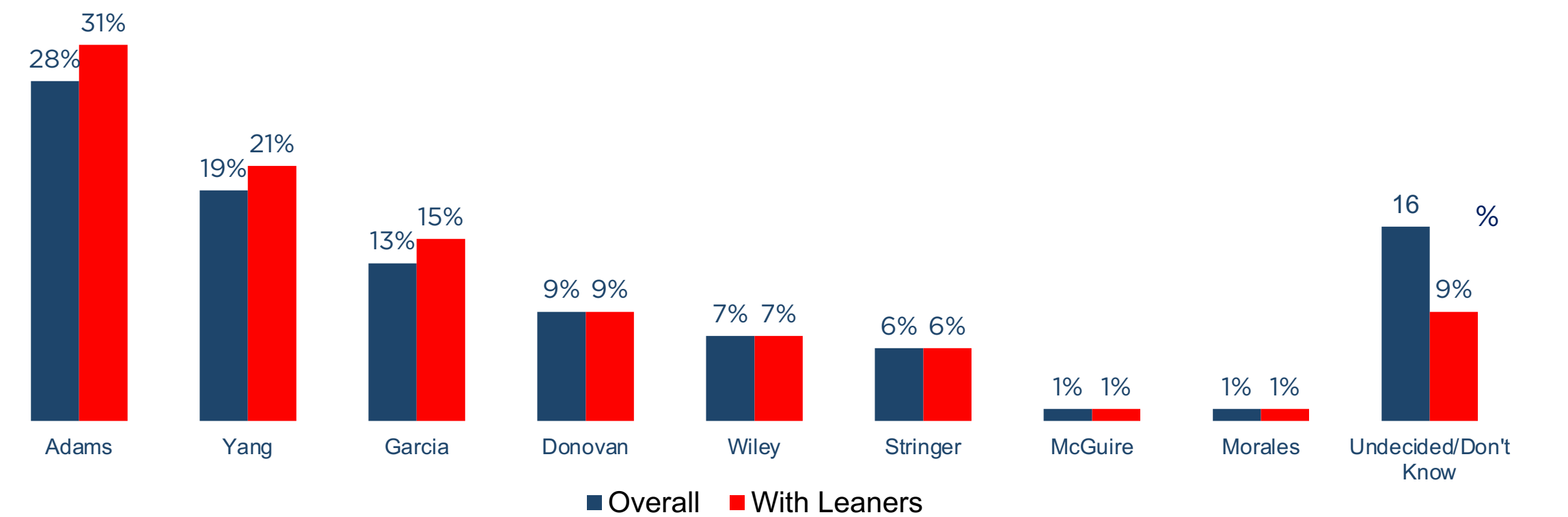
- Overall, Adams leads with 28% of the vote. Yang gets 19% of the vote. Garcia is at 13%, Donovan at 9%, Wiley at 7%, and Stringer at 6%, with 16% undecided.



Question 13: If the June 2021 Democratic Primary Election for Mayor were taking place today, for whom would you vote... Eric Adams, Shaun Donovan, Kathryn Garcia, Ray McGuire, Dianne Morales, Scott Stringer, Maya Wiley, or Andrew Yang?

Mayoral Ballot

- We asked the 16% who were undecided if there was any candidate that they leaned toward — and then reallocated those voters into each of the respective candidate’s camps. At that point, Adams has a 10-point lead 31% to 21% for Yang.



Question 13: If the June 2021 Democratic Primary Election for Mayor were taking place today, for whom would you vote... Eric Adams, Shaun Donovan, Kathryn Garcia, Ray McGuire, Dianne Morales, Scott Stringer, Maya Wiley, or Andrew Yang?/
Question 15: Which candidate do you LEAN towards supporting for Mayor?

Mayoral Ballot

- In order to gather data about the full state of the race, we also asked voters, as we will see in the June primary election, how they intend to vote in the additional “waves” of voting beyond their first choice.

- 2nd choice

- 3rd choice

- 4th choice

- 5th choice

Progression of the Ballot

- After 2nd choice, upwards of two in three voters are undecided about who they will choose to vote for. From 4th choice to 5th choice, at least nine in ten voters don't have a choice.

	2nd Choice	3rd Choice	4th Choice	5th Choice
Adams	12%	3%	1%	1%
Yang	13%	6%	2%	0%
Garcia	10%	6%	2%	1%
Donovan	8%	4%	1%	0%
Wiley	8%	4%	1%	1%
Stringer	15%	6%	1%	1%
McGuire	7%	4%	0%	0%
Morales	5%	2%	1%	1%
Undecided	22%	65%	90%	95%

Question 16-19: If the June 2021 Democratic Primary Election for Mayor were taking place today, for whom would you vote...
Eric Adams, Shaun Donovan, Kathryn Garcia, Ray McGuire, Dianne Morales, Scott Stringer, Maya Wiley, or Andrew Yang?
Second, Third, Fourth & Fifth Choice.

Ranked-Choice Voting Simulation



Ranked-Choice Voting Simulation

- In order to better gauge the outcome of the upcoming Mayoral race, we conducted a ranked-choice voting simulation where we took all of the 1st choice, 2nd choice, 3rd choice, 4th choice and 5th choice votes and determined which candidates would get the remaining votes once the field of candidates was reduced to ultimately only the top 2 candidates.
- Through our ranked-choice voting simulation analysis, we found that the initial field of top candidates consists of:
 - Adams
 - Yang
 - Garcia
 - Donovan
- When the field is reduced further to only three candidates, we found that the likely field of candidates consists of:
 - Adams
 - Yang
 - Garcia

Ranked-Choice Voting Simulation

- When the field is reduced further to only two candidates, we found that the likely field of candidates consists of:
 - Adams
 - Yang
- Ultimately, when the field consists of only two candidates, we found that the likely winning candidate would be:
 - Eric Adams

Ranked-Choice Voting Simulation

- Below, an illustration of how the votes get re-allocated between the various candidates once the voters who are undecided are removed from the ballot and the number of candidates is reduced by their subsequent choices until we are left with one candidate standing.

	Ballot with Undecided	Round					
		1	2	3	4	5	6
Adams	33%	33%	34%	35%	39%	44%	56%
Yang	23%	23%	23%	25%	29%	33%	44%
Garcia	15%	16%	16%	17%	19%	24%	
Donovan	11%	11%	11%	12%	13%		
Wiley	9%	9%	7%	11%			
Stringer	7%	7%					
McGuire	1%	1%					
Morales	1%						

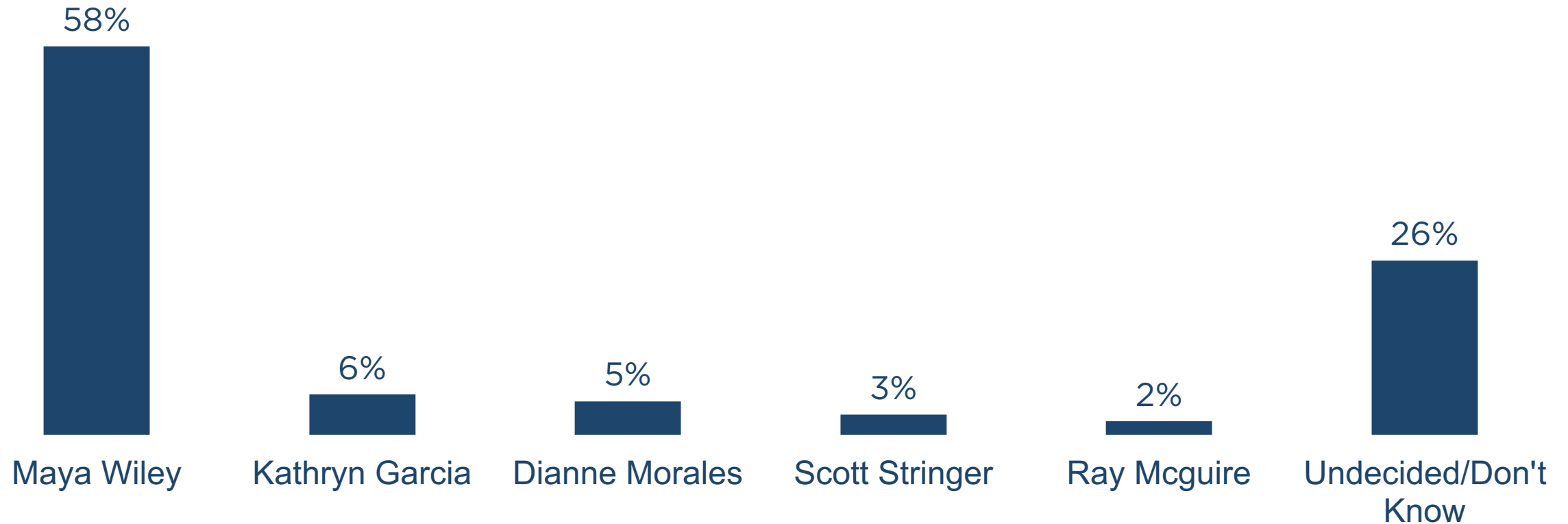
Question 13: If the June 2021 Democratic Primary Election for Mayor were taking place today, for whom would you vote...
Eric Adams, Shaun Donovan, Kathryn Garcia, Ray McGuire, Dianne Morales, Scott Stringer, Maya Wiley, or Andrew Yang?

AOC Endorsement



AOC Endorsement

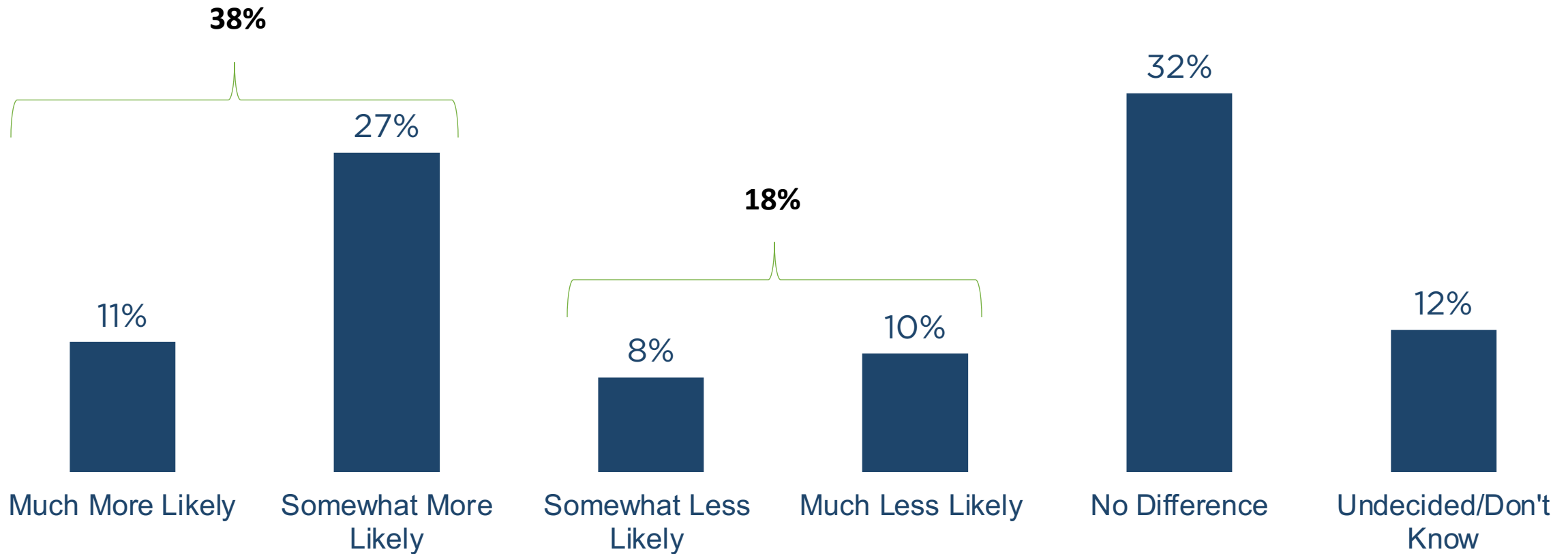
- Six in ten voters are aware that AOC endorsed Wiley.



Question 13X: Alexandria Ocasio-Cortez recently endorsed a candidate for Mayor. To the best of your knowledge, which candidate did she endorse?

AOC Endorsement

- While 38% say they are more likely to vote for the candidate AOC endorses, 18% say they are less likely, and 32% say it makes no difference. 12% don't know or are undecided.



Question 14X: If Alexandria Ocasio-Cortez endorsed a candidate for Mayor would that make you more or less likely to vote for that candidate?

AOC Endorsement

- After respondents were informed that leading progressives such as AOC, Elizabeth Warren and Jumaane William endorsed Maya Wiley, we re-asked the ballot question to understand what impact, if any, those endorsements had on the race. Wiley's percentage of the vote increased four percentage points which is just outside of the the margin of error, suggesting that these endorsements did not have meaningful impact on the race.

	Overall	Informed Ballot	Change
Adams	28%	26%	-2%
Yang	19%	15%	-4%
Garcia	13%	11%	-2%
Donovan	9%	9%	0%
Wiley	7%	11%	4%
Stringer	6%	9%	3%
McGuire	1%	1%	0%
Morales	1%	1%	0%
Don't know	16%	18%	2%

Question 15X: Leading progressive voices like Alexandria Ocasio-Cortez, Elizabeth Warren, and Jumaane Williams recently endorsed Maya Wiley, saying she will be the best Mayor for all of New York City. Knowing this, if the Democratic Primary Election for Mayor were taking place today, for whom would you vote?

Restaurant Industry



Restaurant Industry

- Given the importance of the restaurant industry to New York City, we wanted to understand respondents' attitudes and opinions about the restaurant industry post-COVID.
- We asked respondents a series of attitudinal questions about the restaurant industry and each respondent was asked to tell us whether they strongly agree, somewhat agree, somewhat disagree or strongly disagree with each statement. These statements included:
 - New Yorkers should try and go out to eat at a restaurant or diner to help an industry that was crushed by the pandemic. Eating at a restaurant puts money directly back into the hands of working people - women, people of color, single mothers, immigrants, and the formerly incarcerated.
 - Bringing New Yorkers and tourists back to eat at restaurants across the five boroughs of New York City is critical to New York's recovery from COVID.
 - The outdoor dining which opened as a result of the COVID pandemic helped enhance neighborhoods and communities and hopefully is here to stay.
 - For New York City to recover, our restaurants and nightlife need to be at the core of recovery, not just as the economic foundation, but also the social fabric. Eating, drinking and socializing is part of the DNA of New York City's cultural life.

Restaurant Industry

- Respondents believe that restaurants are core to the city's recovery and that residents and tourists must go out and frequent them to help aid in the city's recovery.

	Strongly Agree	Very + Somewhat Agree	Very + Somewhat Disagree	Don't Know
For New York City to recover, our restaurants and nightlife need to be at the core of recovery, not just as the economic foundation, but also the social fabric. Eating, drinking and socializing is part of the DNA of New York City's cultural life.	69%	90%	8%	2%
New Yorkers should try and go out to eat at a restaurant or diner to help an industry that was crushed by the pandemic. Eating at a restaurant puts money directly back into the hands of working people - women, people of color, single mothers, immigrants, and the formerly incarcerated.	63%	82%	11%	7%
Bringing New Yorkers and tourists back to eat at restaurants across the five boroughs of New York City is critical to New York's recovery from COVID.	63%	89%	9%	2%
The outdoor dining which opened as a result of the COVID pandemic helped enhance neighborhoods and communities and hopefully is here to stay.	60%	83%	16%	2%

Question 23: Please tell me whether you agree or disagree with each of the following statements about restaurants.

Cannabis

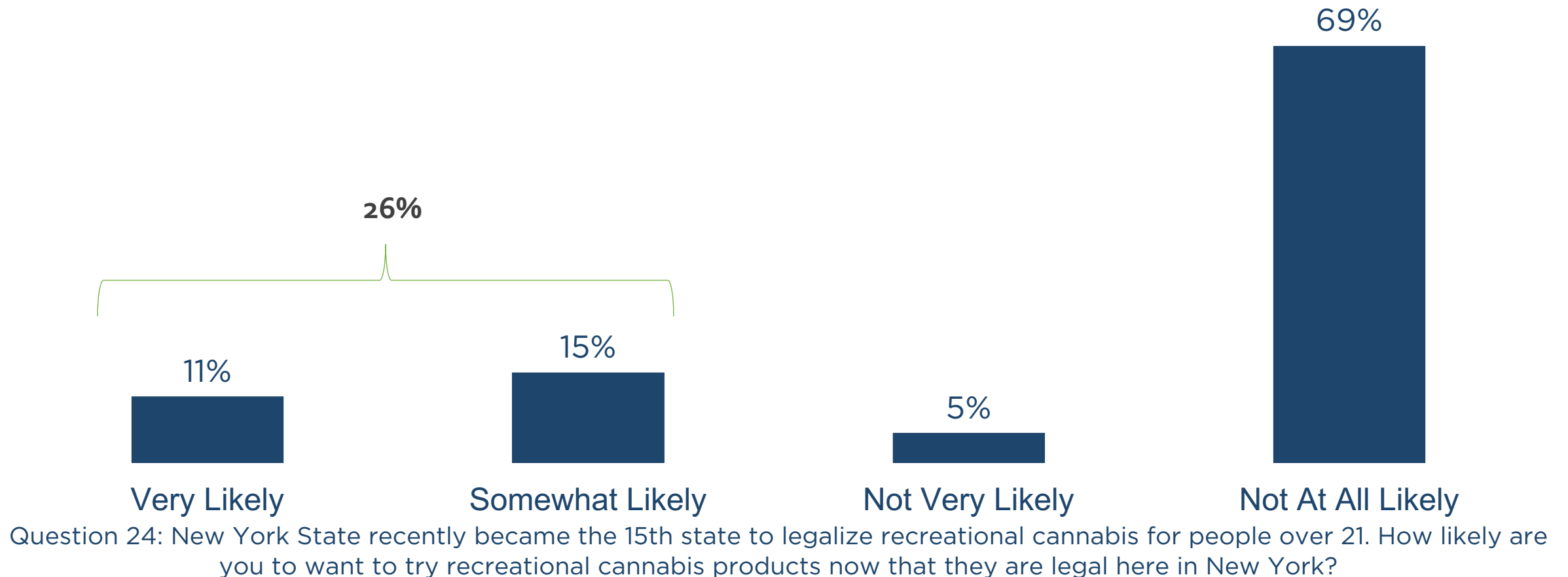


Cannabis

- Lastly, we asked a question about the recent legalization of cannabis for recreational purposes since New York State recently became the 15th state to legalize recreational cannabis for people over 21.
- We found that there are likely some stigmas associated with cannabis and that additional education will be required before a broader group of residents are likely to consider trying such types of products.

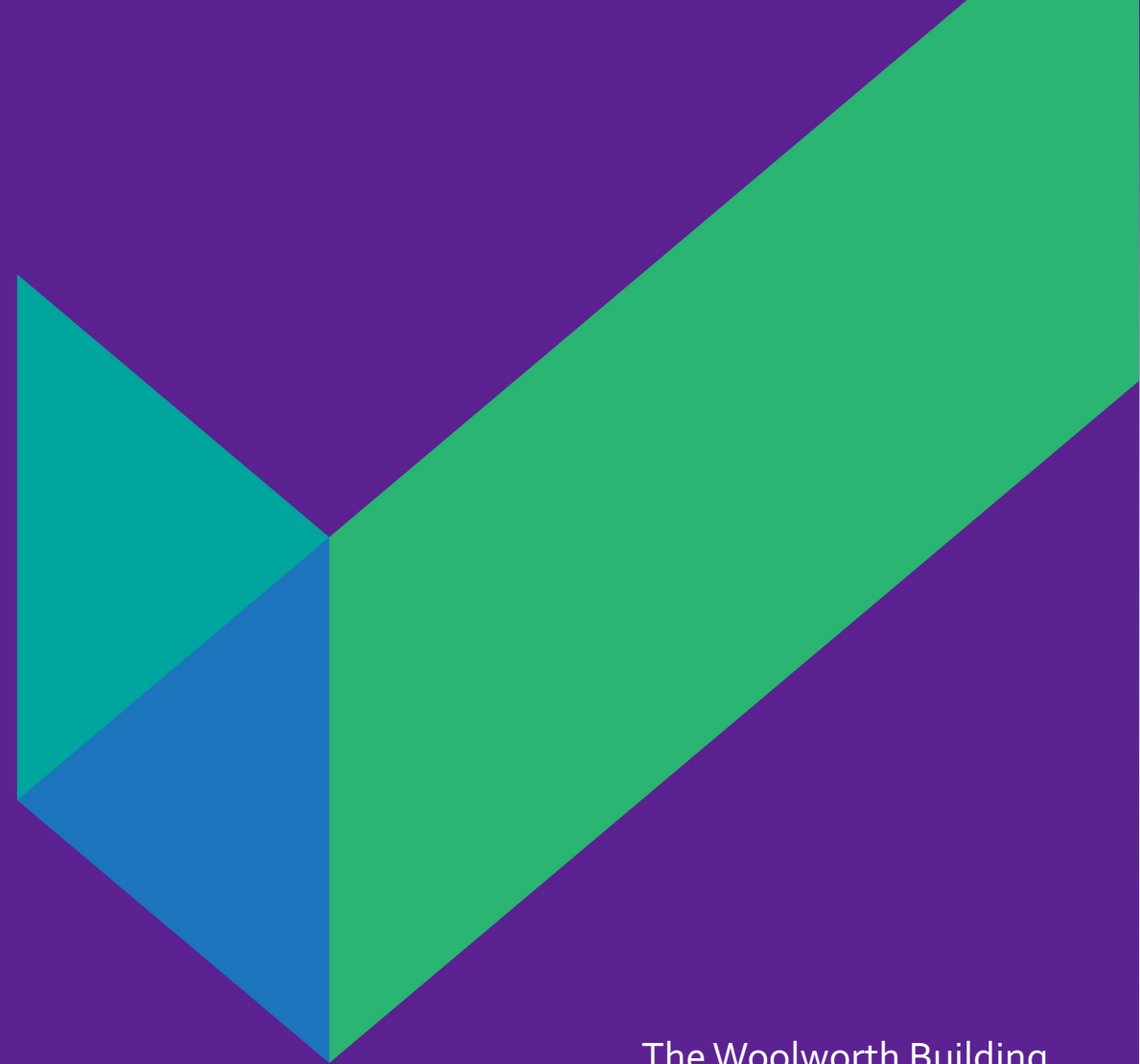
Cannabis

- With the recent legalization of recreational cannabis, only approximately one-quarter of NYC voters are likely to want to try recreational cannabis products now that they are legal in the state whereas approximately three-quarters say they are not likely to do so.



**We are Capalino.
We get it done.**

CAPALINO



The Woolworth Building
233 Broadway, Suite 710
New York, NY 10279
Tel: (212) 616-5810
capalino.com
contact@capalino.com