

A close-up photograph of the American flag, showing the texture of the fabric and the stitching of the stars. The image is split diagonally from the top right to the bottom left, with the blue field containing white stars on the left and the red field on the right. The stars are embroidered in white thread.

THE 2016 PRESIDENTIAL RACE

A BRAND BELIEVABILITY™ REPORT BY WILL & GRAIL



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INTRODUCTION

Brand Believability™ is a methodology to measure and understand the factors that influence perception of a brand's alignment with purpose. Instead of applying it to a brand like Ford or Apple, we put it to use in the upcoming presidential election. The same value-based strategy we have found essential for business success can be just as imperative for presidential candidates when it comes to connecting with voters and creating an engaged coalition excited to vote.

This election is dividing the nation and igniting debate about what we want in our Commander in Chief. Candidates tout massive tax reform, sweeping foreign policy strategies and other large scale changes they want to enact if they win. Using Brand Believability, we set out to determine if voters actually believe these candidates or their parties have the capacity to make a positive impact.

We surveyed a swath of likely voters to assign Brand Believability Scores for three

presidential candidates (**Hillary Clinton, Donald Trump** and **Gary Johnson**) and their parties (**Democratic, Republican** and **Libertarian**). Scores reflect voters' belief in each of them having a positive, profound impact on lives, communities and the world over the next four years. In early October, our respondents scored each on a scale from 0-10, with 10 being a perfect score, and provided a written explanation for their ratings. In this report, you will find demographic breakdowns on lines of party affiliation and gender, along with

generational breakdowns of 18-34 years old (millennials), 35-50 years old (Generation X) and 51-69 years old (baby boomers).

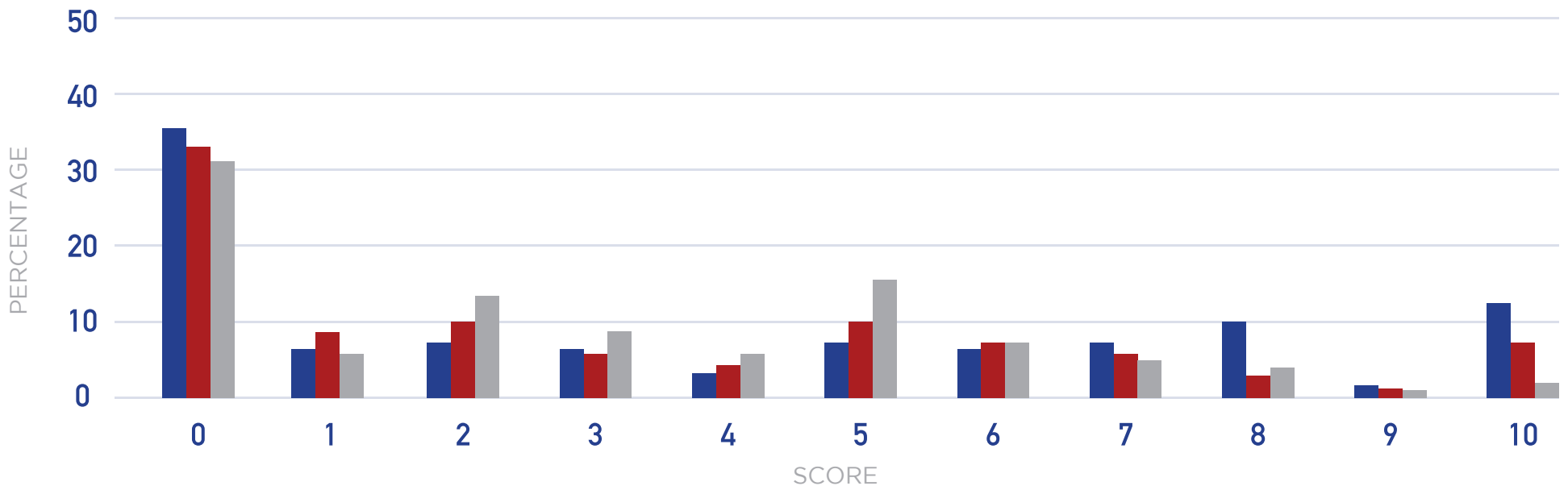
This is not a poll designed to tell you which way Florida might swing or the net-favorability of candidates. The Brand Believability Score is a simple measure of how voters see the intention, direction and action of each candidate. We hope to further the discussion about what Americans expect from a president they believe in and the faith we put in our institutions to improve our society.

CANDIDATE SCORES

- ★ The most common score for each candidate was zero.
- ★ Clinton received highly polarized scores, with more than half of her ratings being a zero, nine or 10.
- ★ Clinton received her highest marks from women who align with the Democratic Party, who gave her the highest average for any candidate or party among any demographic.
- ★ Independents see Clinton as the most believable candidate and Trump as the least.
- ★ Trump's ratings were less polarized than others, with more than 50% of his ratings being either zero or five.

- ★ Trump's strongest belief comes from Republican men.
- ★ Baby boomers find Trump most believable, while millennials and Generation X scored both Clinton and Johnson higher on average.
- ★ Johnson received his highest believability scores from Millennials.
- ★ Republican men rated Johnson twice as high as Republican Women.
- ★ Johnson's believability was higher amongst Democrats than Republicans.

CLINTON
 AVG: 3.77
 TRUMP
 AVG: 3.4
 JOHNSON
 AVG: 2.92





HILLARY CLINTON

AVERAGE SCORE: 3.77

OVERALL SCORING

Of the three candidates, Clinton scored the highest overall in our report. That's not saying much, though. Clinton's ratings were highly polarized, with respondents displaying either a complete lack of belief in her ability to make a positive impact or total confidence that she will carry out a beneficial and profoundly effective agenda as President. Most respondents (35 percent) gave her a zero, with the next most-common scores being 10 and 8 - counting toward 22 percent of her overall rating.

PARTY UNITY AND HIGH MARKS FROM WOMEN

The former First Lady and Senator received her highest marks from women who align with the Democratic party. They gave her an average score of 7.57, the highest average for any candidate or party. People aged

35-50 and Independents as a whole found Clinton's brand to be more believable as well, giving her an average of 4.86 and 4.12 respectively. Her score typically aligned with the Democratic party, too, as members rated her at 6.52, slightly higher than they rated their own party (6.46).

NO BELIEVABILITY ACROSS THE AISLE

Republicans see the prospects of a Clinton presidency bleakly, giving her an average score of 1.64. Her lowest scores from the opposing party were from men, whose ratings averaged 1.61, barely edging out Republican women who gave her a 1.68. Baby boomers don't view her kindly either. Those 51-69 years old thought saw the impact of a Clinton Presidency largely negative, giving her a 3.02, a full point behind Trump and a point higher than Johnson.

RESPONSES

In the open-ended questions, those who rated the believability of Clinton's impact focused on her ideological alignment with their own values. Female Democrats, young and old, provided the most positive, substantive responses for her, listing progressive policies, experience in foreign affairs as Secretary of State and her history of work for children's healthcare and women's rights as reasons for optimism. However, even positive responses, often from Independents, remained tepid. They referred to her as a flawed or imperfect candidate who would probably not bring about a large-scale positive impact, but still was a better choice than Trump.

The vast majority of her lowest scores came from respondents who did not necessarily note her policy positions, but questioned

how much they trust her to act in the interest of the country. Those we surveyed across the spectrum called into question her motivations, which they see as self-serving, her relationships with big-money donors and the financial industry and ethical issues related to her non-profit, The Clinton Foundation. Answers with a more angered tone often came from Republican women. They found her corrupt, stated she should be imprisoned for her controversial use of a private email server as Secretary of State and worried she would continue many of the policies espoused by President Obama, which Republicans feel have had a negative impact on the American economy and relations with countries around the world.



DONALD TRUMP

AVERAGE SCORE: 3.4

OVERALL SCORING

The Republican nominee came in second in our report, trailing Clinton by a small margin. Trump's scores were less polarized than his Democratic counterpart, but lacked the high ceiling she enjoyed. More than 70% of his ratings feel between zero and five. Only 13% scored him at a nine or 10, indicating the majority of our respondents are, at best, indifferent in their belief that he will bring about positive change as president.

BUOYED BY BOOMERS AND MEN

The famous businessman and reality television star scored highest among his own party with a 5.29, but they also see his brand as less impactful than that of the party he represents. Trump's best age group in terms of believability

was with baby boomers, who rated him highest of all the candidates with a 4.26. The Apprentice star greatly outpaced his competition among men 51-69 years old, who rated him at a 4.56 - nearly two points above Clinton and Johnson.

LOWER THE AGE, LOWER THE BELIEVABILITY

Trump was seen as the least believable candidate amongst Independents with a score of 2.71. As was the case with Clinton, he received his lowest rating among those from the opposing party. Democrats gave him a 1.61 on average, a full point lower than they gave the Republican party. He was the lowest scoring candidate among young people, but his worst rating came from those 35-50 years old.

RESPONSES

Overall, few responses pertaining to Trump displayed the utmost confidence in his ability to greatly impact the country. Positive responses typically found him to be a less corrupt option than Clinton and possessing at least the requisite capability to be a decent president. Independents and Democrats as well as younger voters tended to have the most visceral and angry words in their responses on the Republican candidate, often calling him ignorant, racist and dangerous based on comments he's made regarding women and minorities.

Those who believe in Trump's ability to make a profound, positive impact as President cited his success in real estate and in-depth understanding of capitalism, as well as the fact that

he is not a politician, something they noted as a welcomed change in government. Republican women provided most of the more measured and policy-based responses. They included his desire for lower taxes and his stance against abortion as reasons for believing in his ability to have a positive and profound impact.

This election is often debated on the issue of "insider" vs "outsider," with Trump positioning himself as a change-agent in a corrupt government. In our responses, however, this issue often hurt Trump's believability. Many respondents, mostly Democrats and Independents, said they might not like Clinton, but they did not trust Trump's capacity to run the nation in a positive way.



GARY JOHNSON

AVERAGE SCORE: 2.92

OVERALL SCORING

Johnson, the former Governor of New Mexico and Libertarian candidate for president, received the lowest rating in our report. Similarly to Trump, voters typically rated him between zero and five, with 75% of his scores coming in that range. Strong belief in Johnson's impact was minimal as only 12% of respondents rated him at a seven or higher. Belief in Johnson's impact as president candidate was scored .21 higher than belief in the Libertarian Party in general. His scoring, combined with the explanations indicate most of our respondents do not see him feasibly challenging for the presidency, thus having little-to-no impact.

LIFTED BY THE YOUTH

The strongest belief in Johnson's purpose came among young people, a group widely thought to be disenchanted with the major party candidates this election cycle. He was rated higher than Trump across multiple cross sections in our survey, including Independents, Millennials and Generation X. But his score was kept down due to low opinions of his impact among Republicans, who gave him an average of 2.62. Democrats tended to rate Johnson nearly a full point higher than Republicans - an interesting trend given that Libertarian beliefs are thought to align more with right-leaning voters. This could be a byproduct of Johnson seemingly taking more votes from Trump, elevating his scores among Clinton supporters and hurting him with Trump supporters.

GOP GENDER GAP

Among our three age groups, Johnson did worst with baby boomers. They scored the believability of his impact at a 2.05. When it comes to the gender gap, Johnson took a big hit again. Republican women gave him an average rating of 1.94, his lowest in any demographic and just barely ahead of Clinton. His score among Republican men was quite high, relatively speaking, with whom he averaged a 3.20.

RESPONSES

Our respondents did not have as much to say about Johnson's potential impact as the did about the major party candidates, indicating they are not as emotionally invested in his prospects compared to Trump or Clinton. Most responses pertaining to him came from Republicans and Independents,

who noted the merit of his free market-focused policies, but frequently stated they would not have much impact were he to win, as his lack of support from Republican and Democratic politicians make it unlikely they would be implemented. Those who rated him highly, a majority of them Independents, saw his positive impact coming simply in the act of running for President and challenging the two-party system.

Open-ended responses mentioning Johnson did not display nearly as much anger and hostility as those about his competition. Answers that did, though, called him incompetent and unknowledgeable on foreign policy issues (the Aleppo effect) and suggested he may hurt America's standing in global politics.

WHAT OUR RESPONDENTS SAID

ON HILLARY CLINTON

- ★ “I like the history of Clinton. As early as a college student she moved to change for the better conditions that affect women and children-in economics, health, education. I think she is better prepared than any of the other candidates.”
- ★ “Clinton made healthcare possible for millions of children, balanced multiple tumultuous international relationships while promoting democracy abroad, is an avid proponent of women’s rights. She may be a bit hawkish but she’s open to public opinion, which is necessary for a public official.”
- ★ “Hillary’s progressive (government is the answer) approach might make an impact in the near term - but ultimately will collapse under the weight of its tax burden.”
- ★ “I do not believe Clinton will make a positive difference in America beyond what will help her own career, which those decisions I do not foresee being beneficial to us.”
- ★ “Fact: Hilliary is a treacherous crook and a power hungry traitor.”

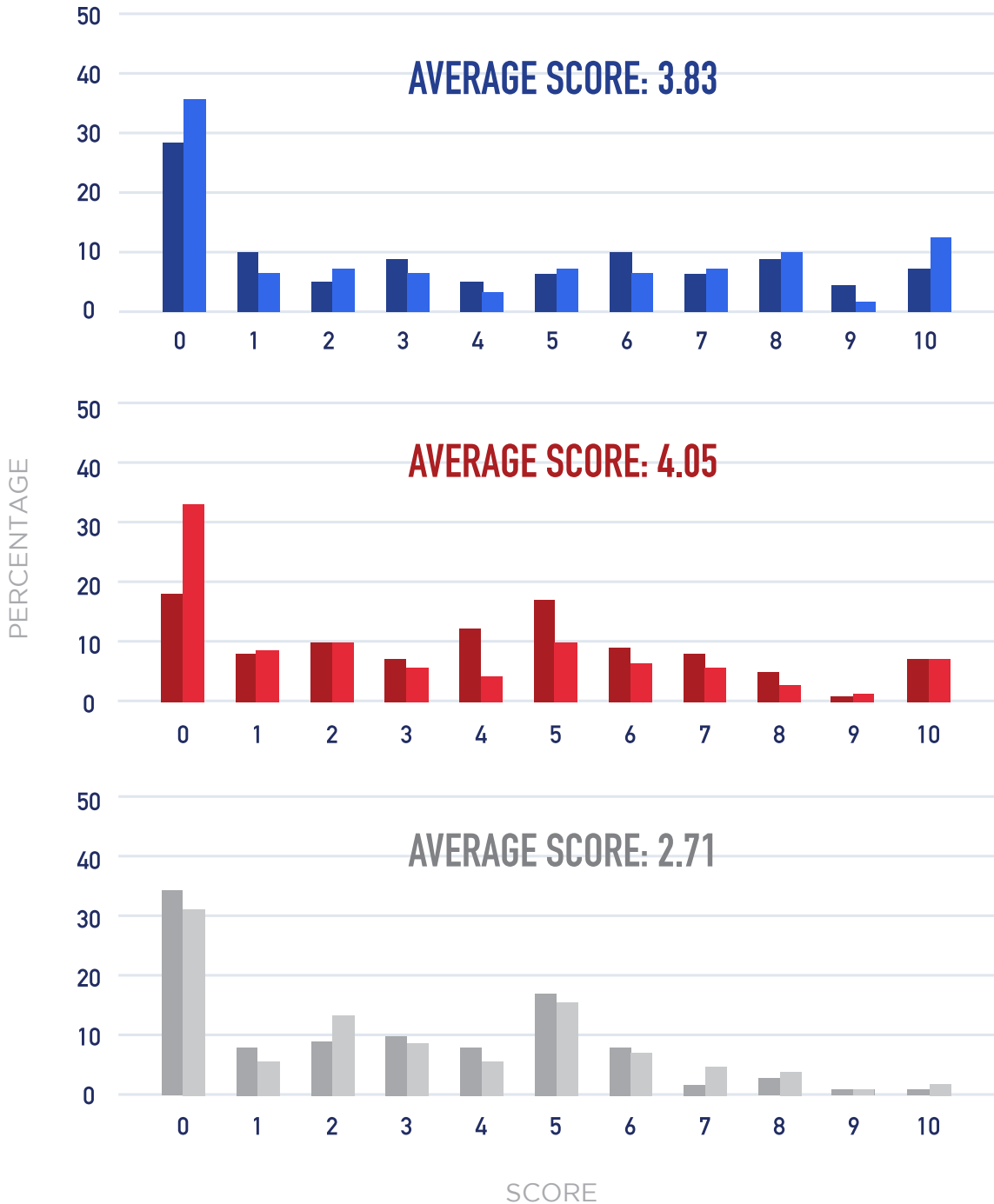
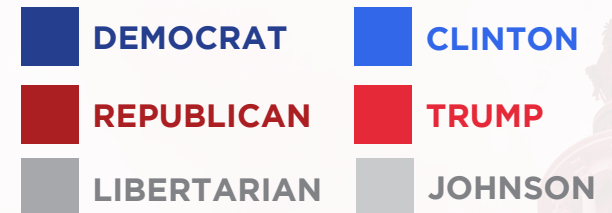
ON DONALD TRUMP

- ★ “Trump is a smart businessman and will help the economy but may not be as empathetic toward some.”
- ★ “We need change, someone who is outside the current political regime , who is capitalistic (business oriented) and will work to make our military stronger and secure our borders.”
- ★ “Trump believes in capitalism and the free enterprise system, which has proven to be the best model for providing people opportunity to succeed. But he comes with the baggage of his big ego.”
- ★ “Donald will nuke the world if he doesn’t get his way.”
- ★ “I believe that Donald Trump has the capabilities to ruin the United States of America. His hatred towards others is very unbecoming, and will ultimately get us in a lot of trouble.”
- ★ “Trump acts too irrationally to hold the single most powerful position in the world.”

ON GARY JOHNSON






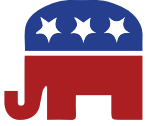

- ★ “Johnson is fighting for a chance to make a change and is being thrown every obstacle possible. He stays on message about the future and how he can influence it.”
- ★ “Gary Johnson seems like a good candidate but may be slightly uninformed and supports abortion.”
- ★ “The tangible benefits of a Gary Johnson Presidency would be offset by the reductions in the social programs of America.”
- ★ “While resoundingly a far better human being than Trump, among his boneheaded policy ideas, the clear lack of foreign policy knowledge stands out.”
- ★ “Johnson doesn’t have the experience or knowledge of world issues to make an impact.”
- ★ “Johnson will not have enough power or support to be able to accomplish much, though he may try.”

PARTY SCORES



- ★ Clinton scored slightly higher than her own party, while Trump was barely outpaced by his.
- ★ Generation X scored Democrats higher than any generation rated any party. Independents scored Democrats higher than their competition, too.
- ★ Baby boomers gave Republicans their highest rating, but scored the party lower than Trump.

DEMOGRAPHIC BREAKDOWN

					IND.	18-34	35-50	51-69
 CLINTON	4.01	3.59	6.52	1.64	4.12	4.22	4.88	3.02
 TRUMP	3.41	3.41	1.61	5.29	2.71	2.57	2.36	4.26
 JOHNSON	2.6	3.11	3.17	2.62	3.36	3.78	3.24	2.05

CONCLUSION

No matter how you slice and dice the numbers, our report makes it clear that many Americans are struggling when it comes to this election. Respondents showed an overall lack of belief that candidates and parties will have a profound, positive impact.

But this does not spell the end of our republic. While our findings indicate a less than optimistic view of the current choices we have, a common definition of

what makes a good candidate provides hope for the future. A genuine, thoughtful and inspiring president. A president we can believe in.

If you would like to receive the full breakdown of our presidential Brand Believability™ Scores, please email withpurpose@willgrail.com or call us at 816-842-6996.

WHAT IS BRAND BELIEVABILITY?

As a society, we are waking up to the need and desire to build companies that focus on both profitability and purpose. Research abounds, showing that purpose-driven brands outperform their peers - from customer acquisition and loyalty, to recruitment and retention, broader community support and financial growth. But why?

Brand Believability™ is a proprietary methodology developed by Will & Grail to

measure and understand the factors that influence market perception of a brand's alignment with purpose. It does it by gathering quantitative and qualitative input that measures the believability of a brand from the aspect of purpose. In short, will the brand make a positive impact on lives, communities and the world? Measuring this allows us to assess whether a brand has purpose, and if it's acting based on this in the brand relationships it builds with key audiences.