

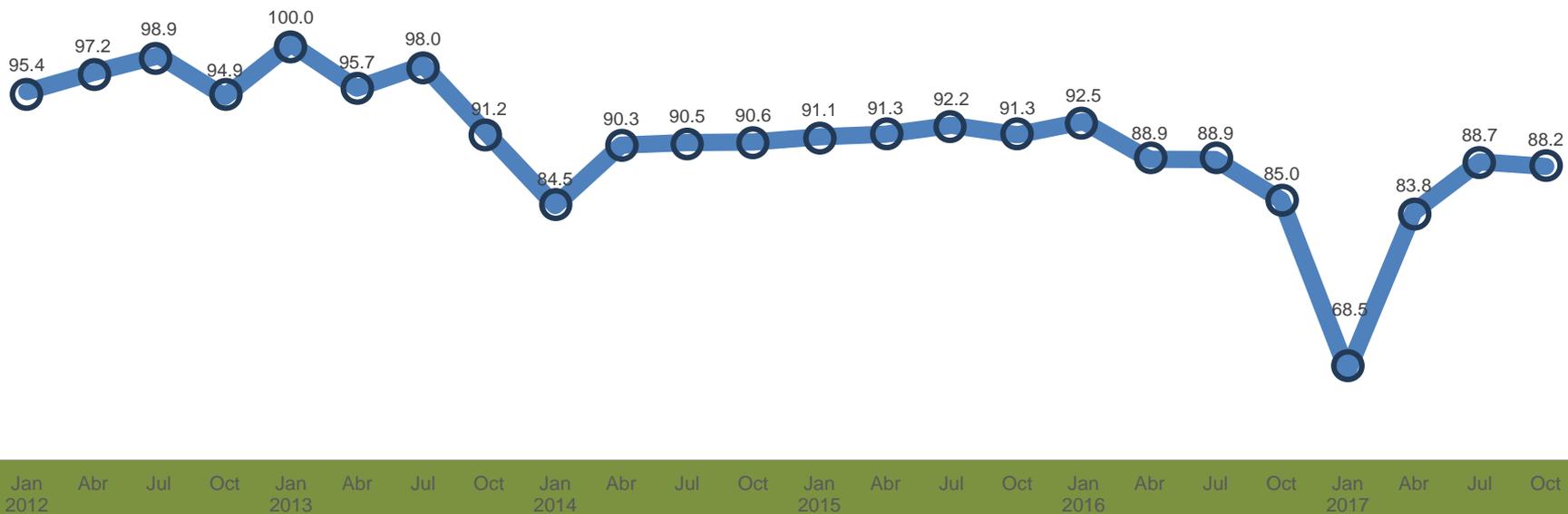
AMLO, the PRI, and the Frente:
A Look at Mexico's 2018 Election

November 16, 2017
Wilson Center. Washington, D.C.

Jorge Buendía
Director of Buendía & Laredo

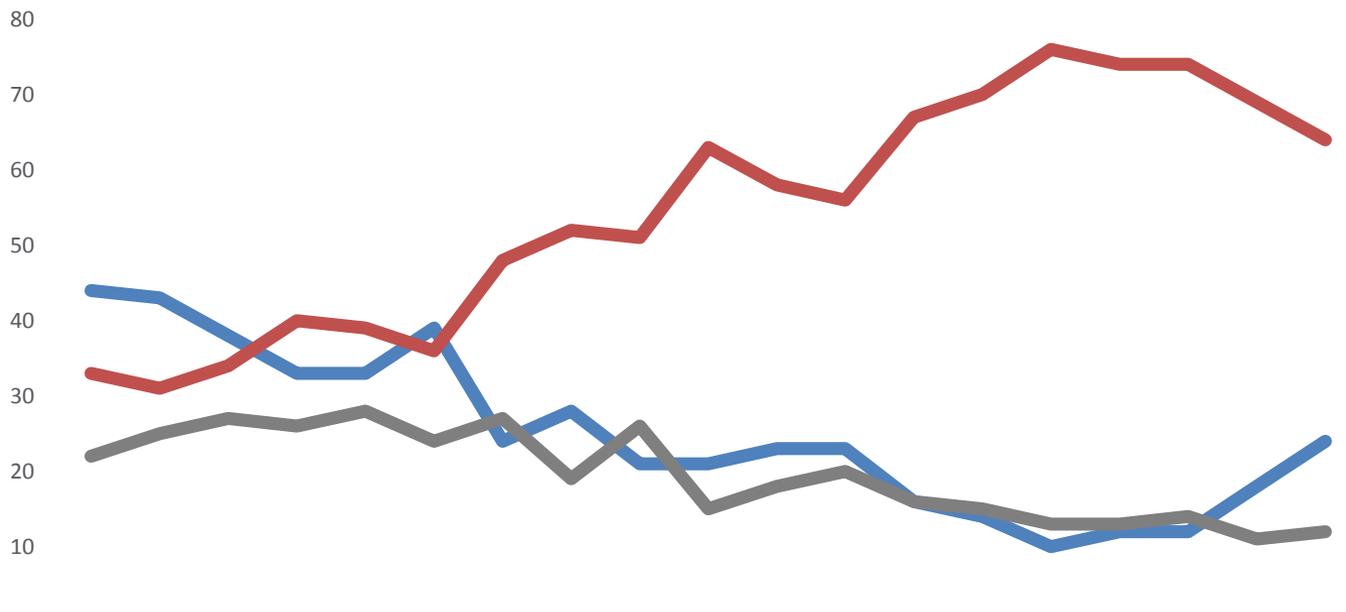


RETROSPECTIVE EVALUATIONS



Source: INEGI & BANXICO

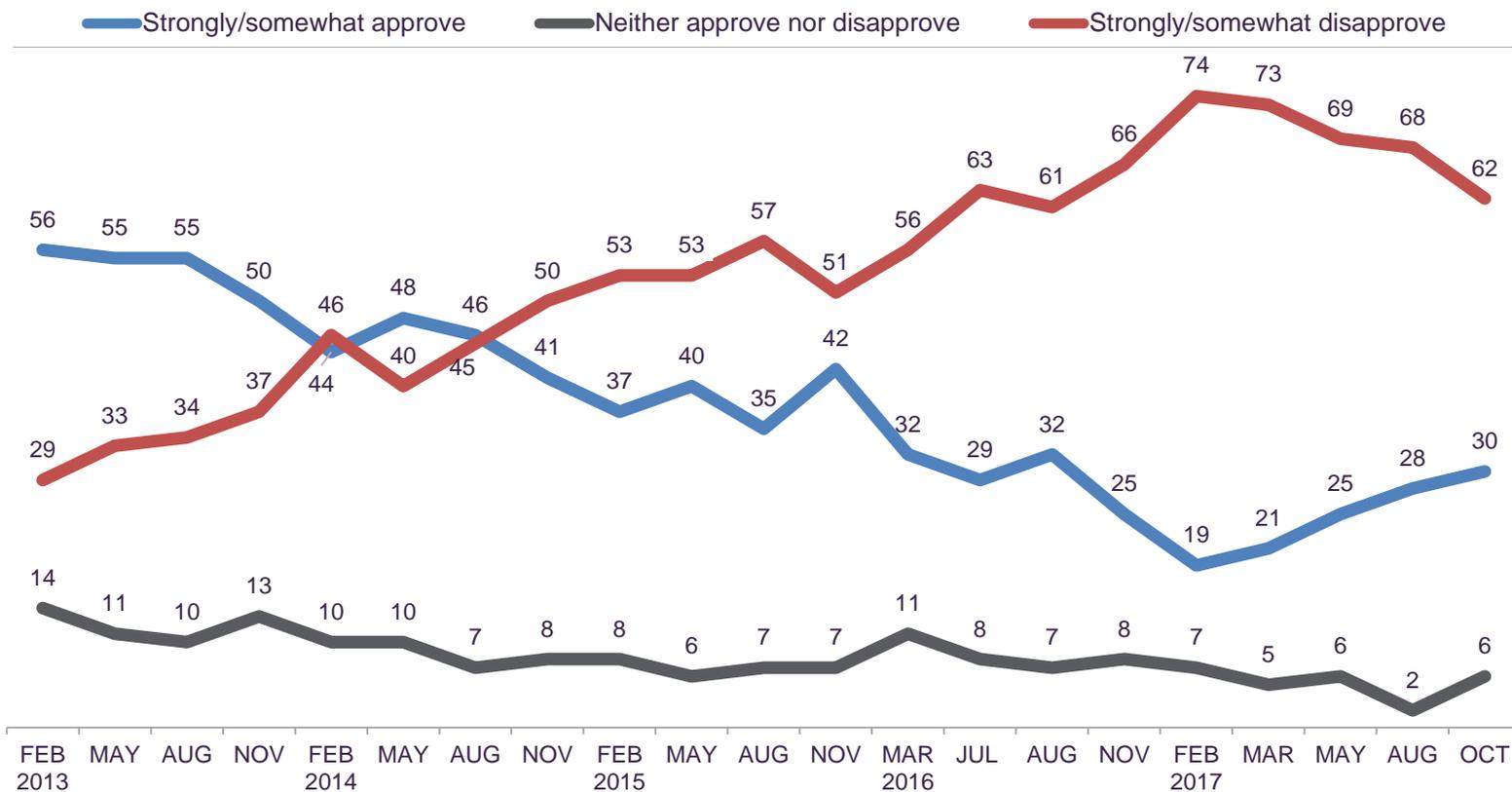
Generally speaking would you say things in Mexico are heading in the right direction or are they on the wrong direction?



	FEB 2013	MAY	AUG	NOV	FEB 2014	MAY	AUG	NOV	FEB 2015	AUG	NOV	MAR 2016	JUL	NOV	FEB 2017	MAR	MAY	AUG	OCT
Very good / somewhat good direction	44	43	38	33	33	39	24	28	21	21	23	23	16	14	10	12	12	18	24
Neither good nor right	22	25	27	26	28	24	27	19	26	15	18	20	16	15	13	13	14	11	12
Very wrong / somewhat wrong direction	33	31	34	40	39	36	48	52	51	63	58	56	67	70	76	74	74	69	64

% of NR/DK not shown

In general, do you approve or disapprove the work that Enrique Peña Nieto is doing as president? Strongly or Somewhat?

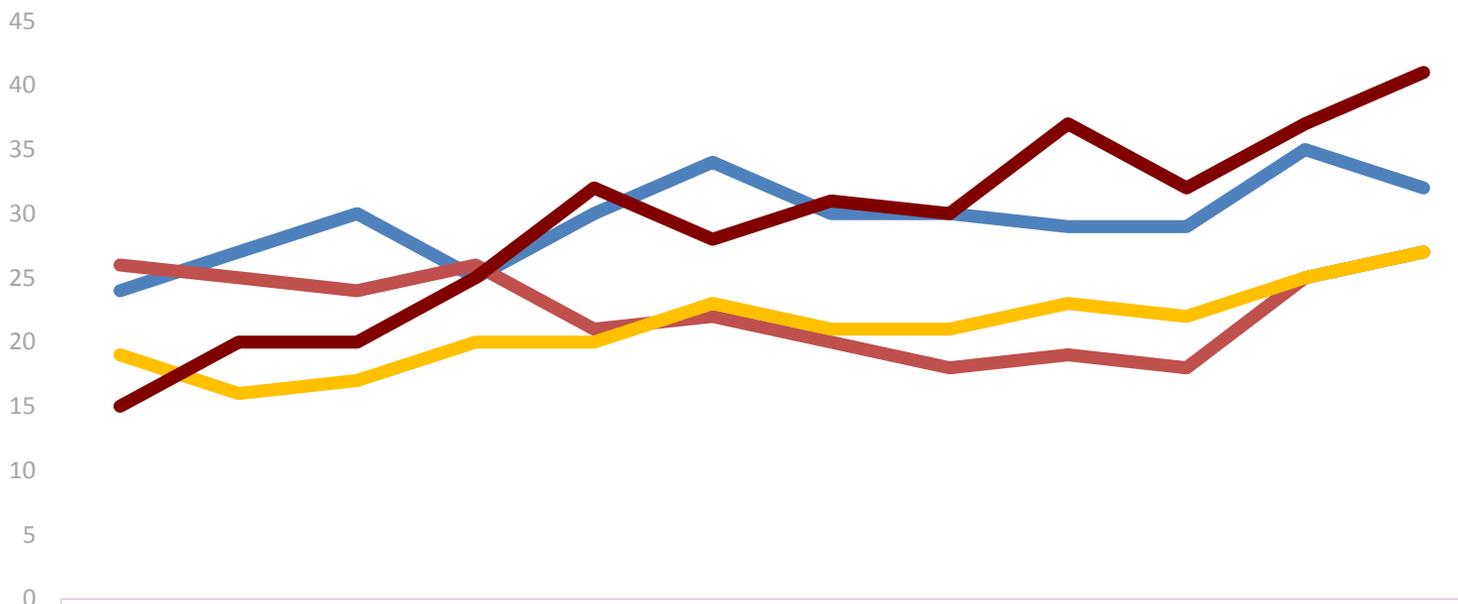


% of NR/DK not shown

A dark blue, monochromatic photograph showing a hand dropping a ballot into a ballot box. The hand is on the left, holding a dark rectangular ballot. The ballot is being lowered into a slot in a dark box at the bottom. The background is a textured, light blue surface, possibly a wall or a large piece of paper. The overall mood is serious and focused.

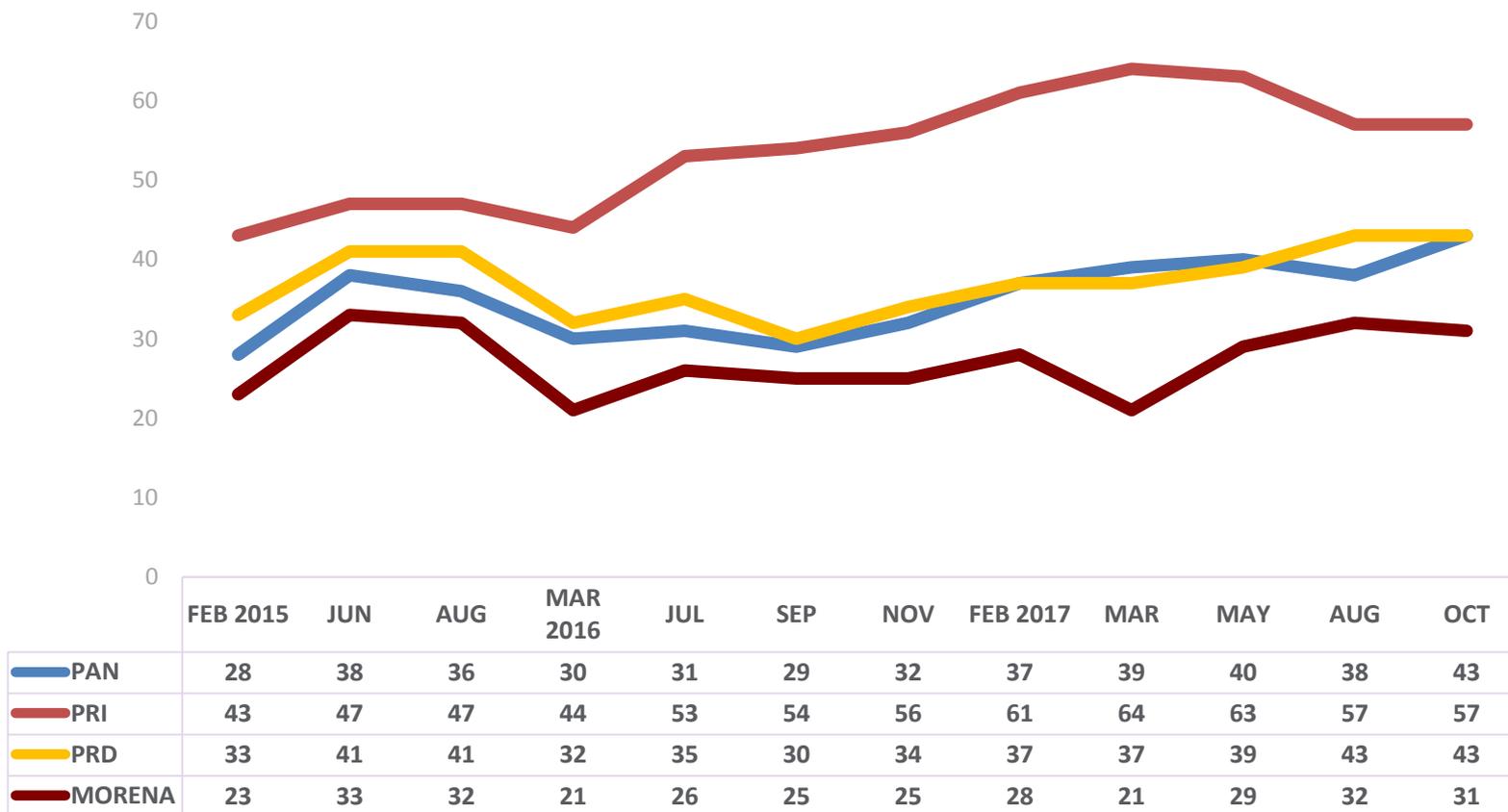
POLITICAL PARTIES AND THE 2018 ELECTION

Now, I am going to read you a list with the name of political parties. Please tell me if you have a very good, good, bad or very bad opinion of each one of them.
What is your opinion of _____?

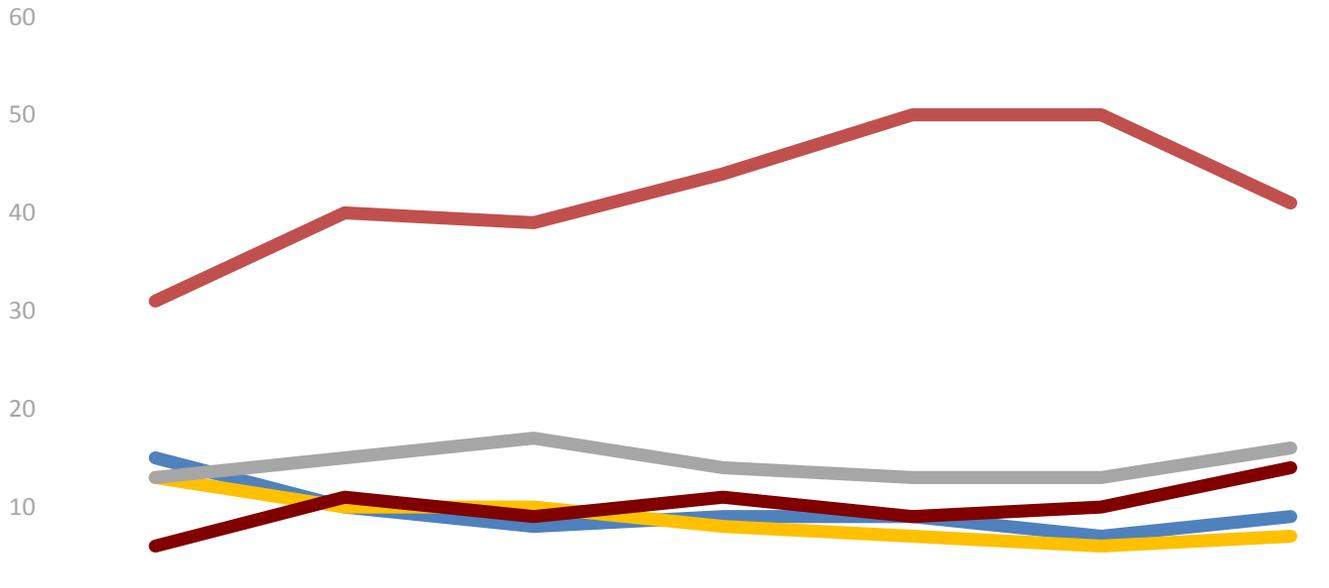


	FEB 2015	JUN	AUG	MAR 2016	JUL	SEP	NOV	FEB 2017	MAR	MAY	AUG	OCT
PAN	24	27	30	25	30	34	30	30	29	29	35	32
PRI	26	25	24	26	21	22	20	18	19	18	25	27
PRD	19	16	17	20	20	23	21	21	23	22	25	27
MORENA	15	20	20	25	32	28	31	30	37	32	37	41

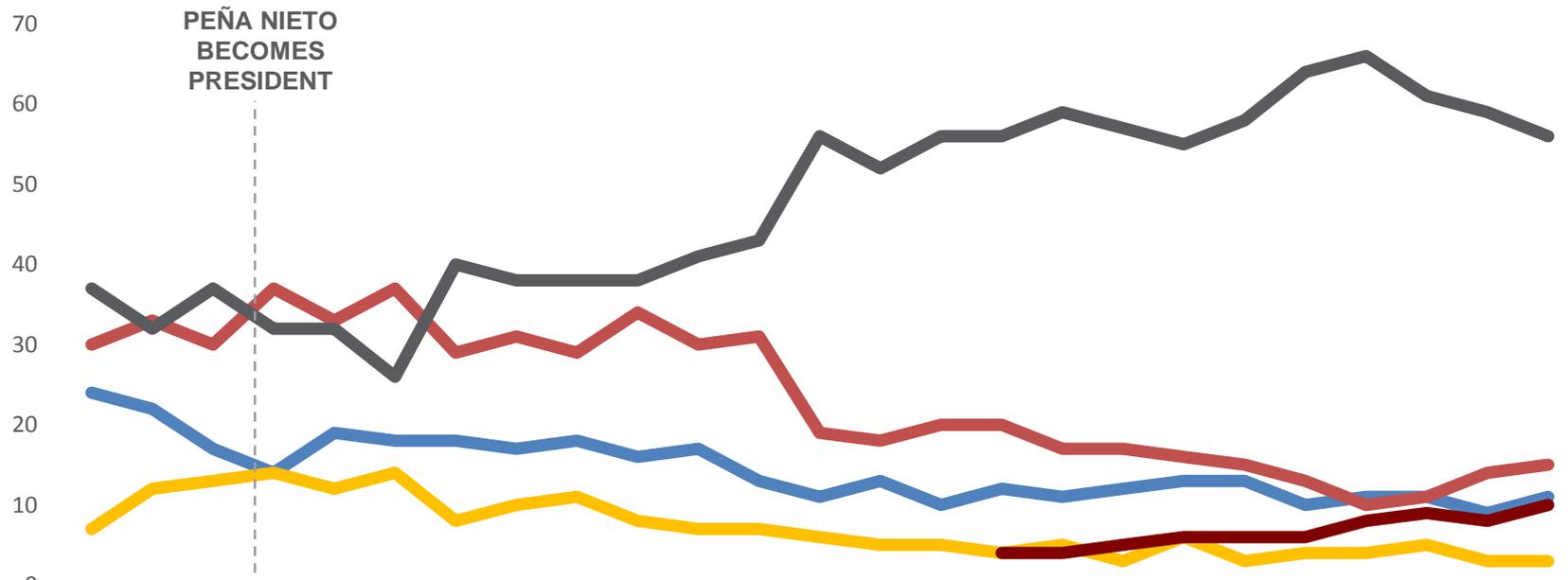
Now, I am going to read you a list with the name of political parties. Please tell me if you have a very good, good, bad or very bad opinion of each one of them. What is your opinion of _____?



For what party would you never vote?



	JUN 2015	JUL 2016	SEP	NOV	MAR 2017	MAY	AUG
PAN	15	10	8	9	9	7	9
PRI	31	40	39	44	50	50	41
PRD	13	10	10	8	7	6	7
MORENA	6	11	9	11	9	10	14
OTHER	13	15	17	14	13	13	16



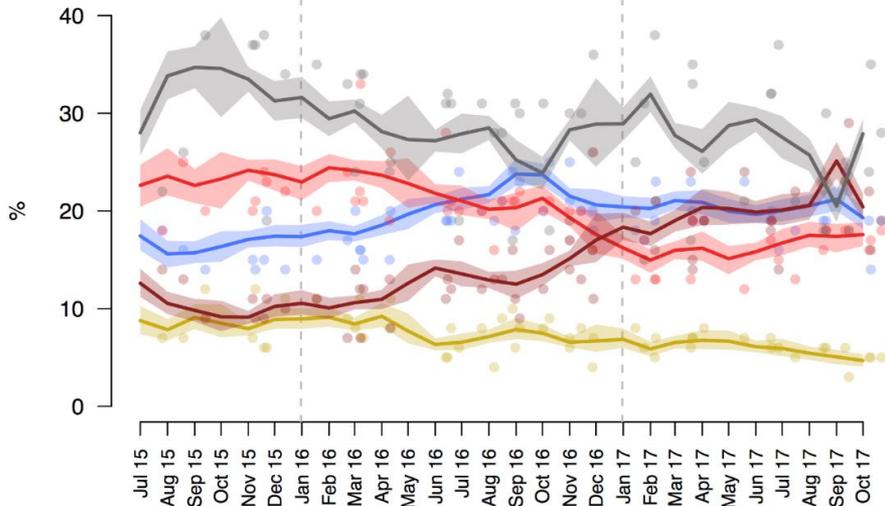
	2010	2011	2012	FEB 2013	MAY	AUG	OCT	NOV	FEB 2014	MAY	AUG	NOV	FEB 2015	JUN	AUG	NOV	MAR 2016	JUL	AUG	NOV	FEB 2017	MAR	MAY	AUG	OCT
Panistas	24	22	17	14	19	18	18	17	18	16	17	13	11	13	10	12	11	12	13	13	10	11	11	9	11
Priistas	30	33	30	37	33	37	29	31	29	34	30	31	19	18	20	20	17	17	16	15	13	10	11	14	15
Perredistas	7	12	13	14	12	14	8	10	11	8	7	7	6	5	5	4	5	3	6	3	4	4	5	3	3
De MORENA																4	4	5	6	6	6	8	9	8	10
Independents	37	32	37	32	32	26	40	38	38	38	41	43	56	52	56	56	59	57	55	58	64	66	61	59	56

% OF OTHER PARTIES NOT SHOWN.
 DATA FROM 2010 TO 2012 ARE ANNUAL AVERAGES.

Dirichlet Dynamic Model
 Hurtado Bodell, M. (2016). Bayesian poll of polls for multi-party systems.

**POLL OF POLLS
 (INCLUDING ITEM NONRESPONSE)
 BAYESIAN DYNAMIC MODEL**

**Poll of Polls (Bruta)
 Modelo Dinamico Bayesiano**

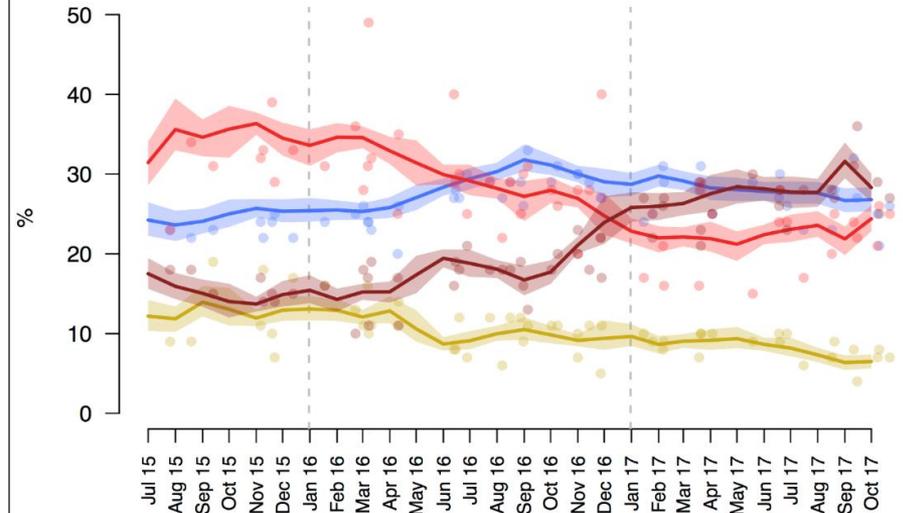


PAN	PRI	PRD	MORENA	NR
19%	18%	5%	20%	29%

PAN+PRD+MC = 26
 PRI + PVEM + NA = 23
 MORENA+ PT = 21

**POLL OF POLLS
 (EXCLUDING ITEM NONRESPONSE)
 BAYESIAN DYNAMIC MODEL**

**Poll of Polls (Efectiva)
 Modelo Dinamico Bayesiano**



PAN	PRI	PRD	MORENA
27%	25%	7%	28%

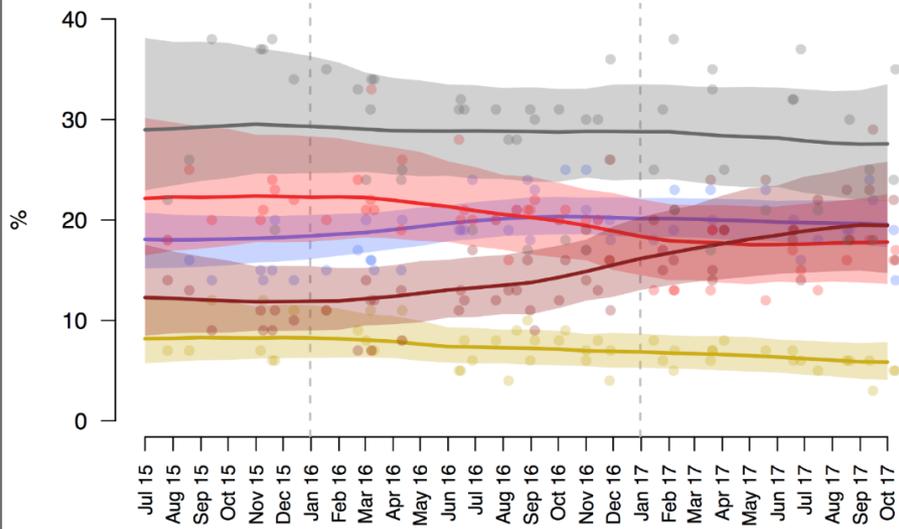
PAN+PRD+MC = 37
 PRI + PVEM + NA = 32
 MORENA+ PT = 30

Source: Javier Márquez Peña
 @JMarquezP

Multinomial dynamic model **with correlated errors**
 Cargnoni, C., Müller, P., & West, M. (1997). Bayesian forecasting of
 multinomial time series through conditionally Gaussian dynamic
 models. *Journal of the American Statistical Association*, 92(438), 640-647..

**POLL OF POLLS
 (INCLUDING ITEM NONRESPONSE)
 BAYESIAN DYNAMIC MODEL**

**Poll of Polls (Bruta)
 Modelo Dinamico Bayesiano**

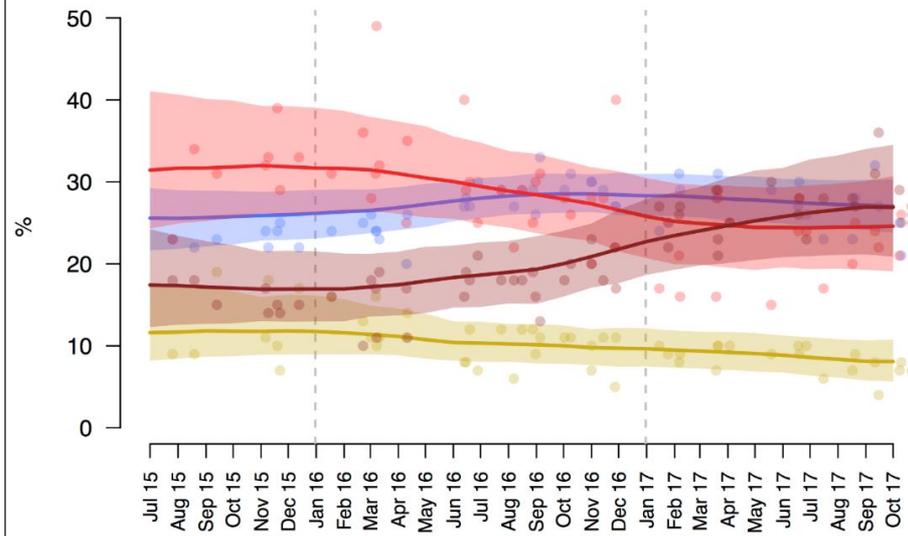


PAN	PRI	PRD	MORENA	NR
20%	18%	6%	20%	28%
[17-22]	[14-22]	[4-8]	[15-26]	[22-34]

PAN+PRD+MC = 28
 PRI + PVEM + NA = 23
 MORENA+ PT = 21

**POLL OF POLLS
 (EXCLUDING ITEM NONRESPONSE)
 BAYESIAN DYNAMIC MODEL**

**Poll of Polls (Efectiva)
 Modelo Dinamico Bayesiano**

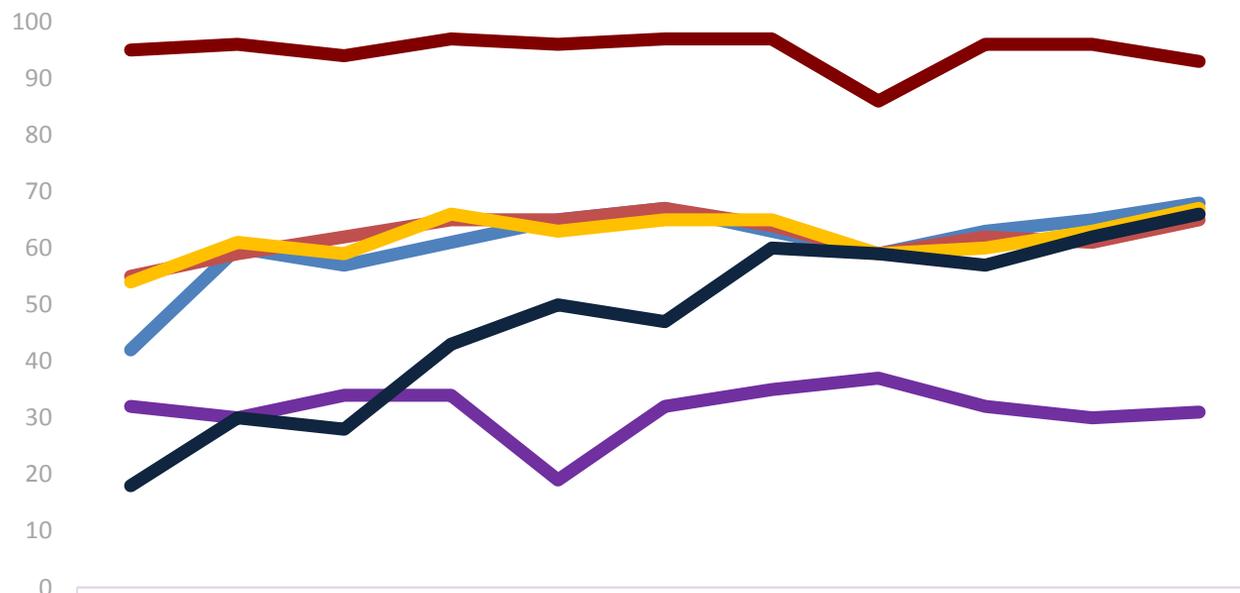


PAN	PRI	PRD	MORENA
27%	25%	8%	27%
[24-30]	[19-31]	[6-11]	[21-35]

PAN+PRD+MC = 38
 PRI + PVEM + NA = 32
 MORENA+ PT = 29

Source: Javier Márquez Peña
 @JMarquezP

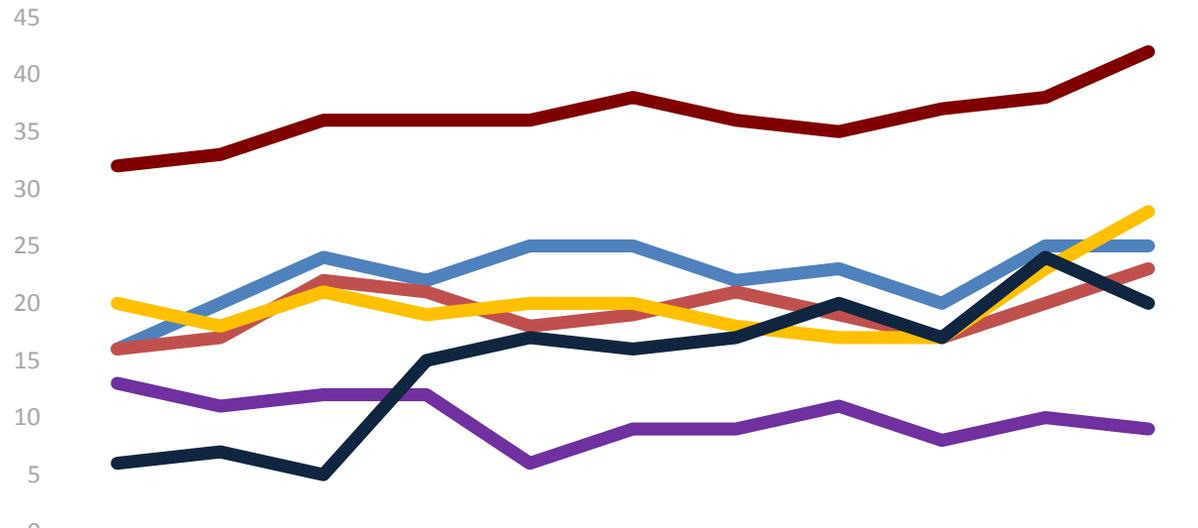
Do you know or have you heard of _____?



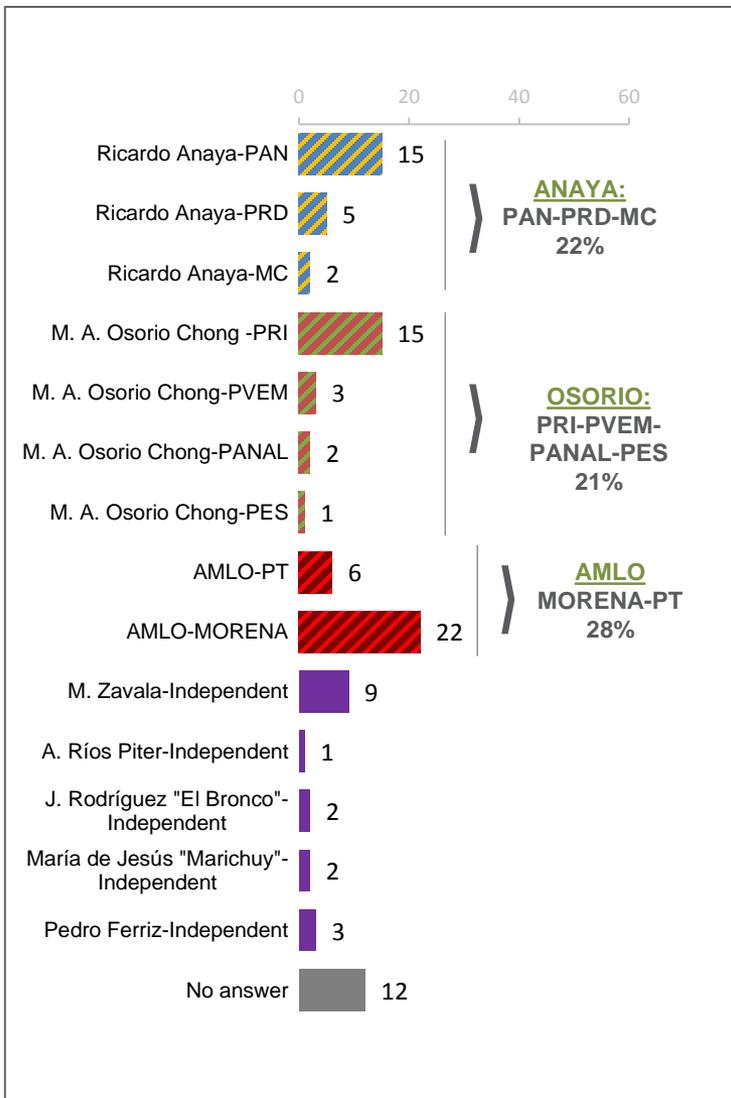
	AGO	NOV	MAR 2016	JUL	SEP	NOV	FEB 2017	MAR	MAY	AGO	OCT
Margarita Zavala	42	60	57	61	65	67	63	59	63	65	68
Miguel Ángel Osorio Chong	55	59	62	65	65	67	64	59	62	61	65
Miguel Ángel Mancera	54	61	59	66	63	65	65	59	60	63	67
Andrés Manuel López Obrador	95	96	94	97	96	97	97	86	96	96	93
Jaime Rodríguez 'El Bronco'	32	30	34	34	19	32	35	37	32	30	31
Ricardo Anaya	18	30	28	43	50	47	60	59	57	62	66

(% of positive opinion)

Please tell me if you have a very good, good, bad or very bad opinion of _____.



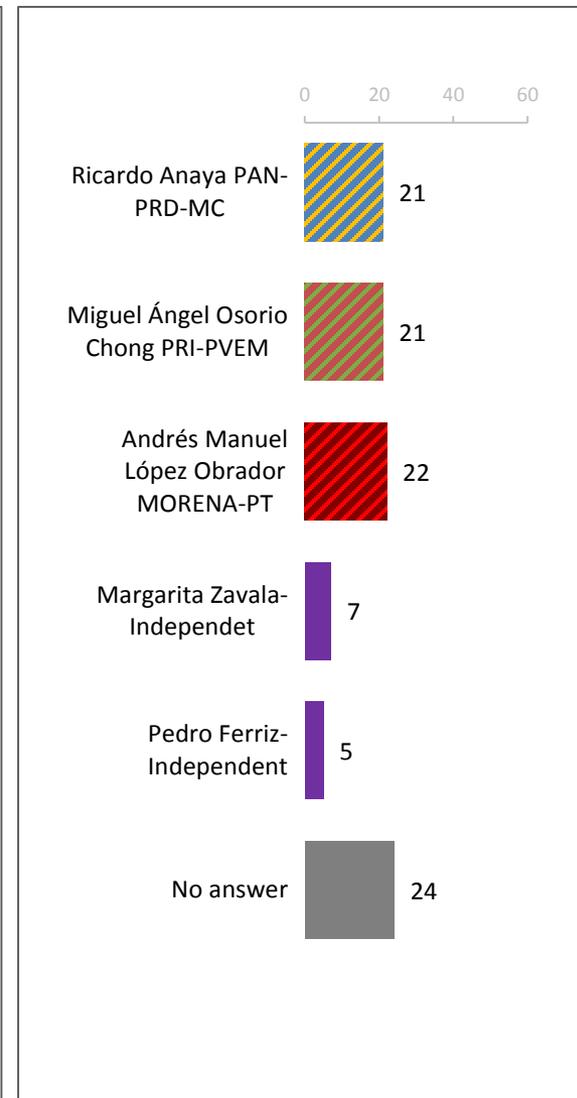
	AUG	NOV	MAR 2016	JUL	SEP	NOV	FEB 2017	MAR	MAY	AUG	OCT
Margarita Zavala	16	20	24	22	25	25	22	23	20	25	25
Miguel Ángel Osorio Chong	16	17	22	21	18	19	21	19	17	20	23
Miguel Ángel Mancera	20	18	21	19	20	20	18	17	17	23	28
Andrés Manuel López Obrador	32	33	36	36	36	38	36	35	37	38	42
Jaime Rodríguez 'El Bronco'	13	11	12	12	6	9	9	11	8	10	9
Ricardo Anaya	6	7	5	15	17	16	17	20	17	24	20



SOURCE: BUENDÍA & LAREDO



SOURCE: EL FINANCIERO

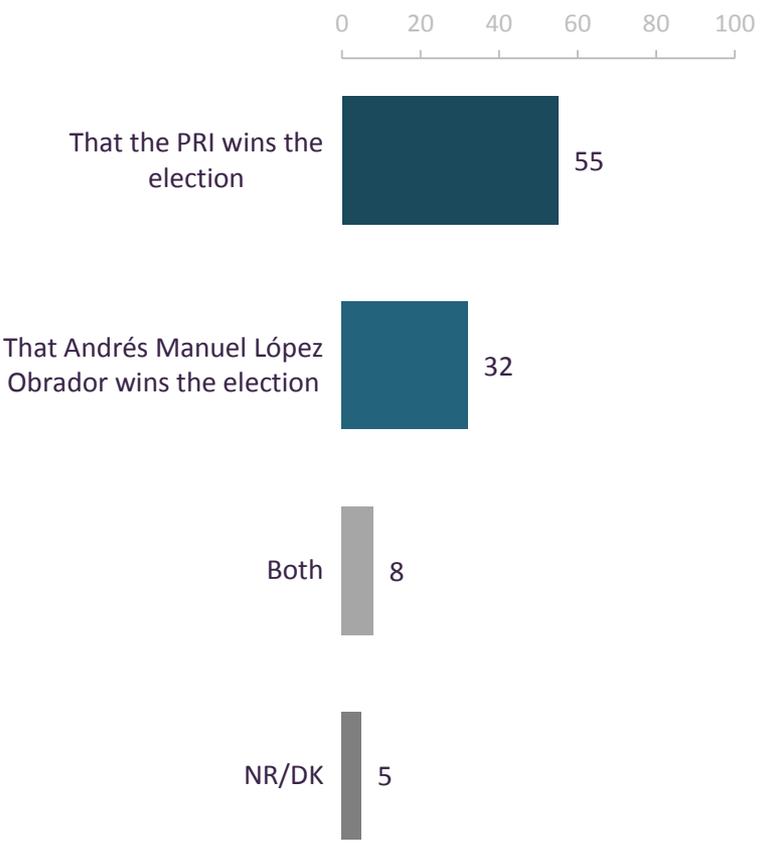


SOURCE: CONSULTA MITOFSKY

HOW POLARIZED IS MEXICO



Which of the following do you think would be the worse scenario for Mexico?



Difference*

+3

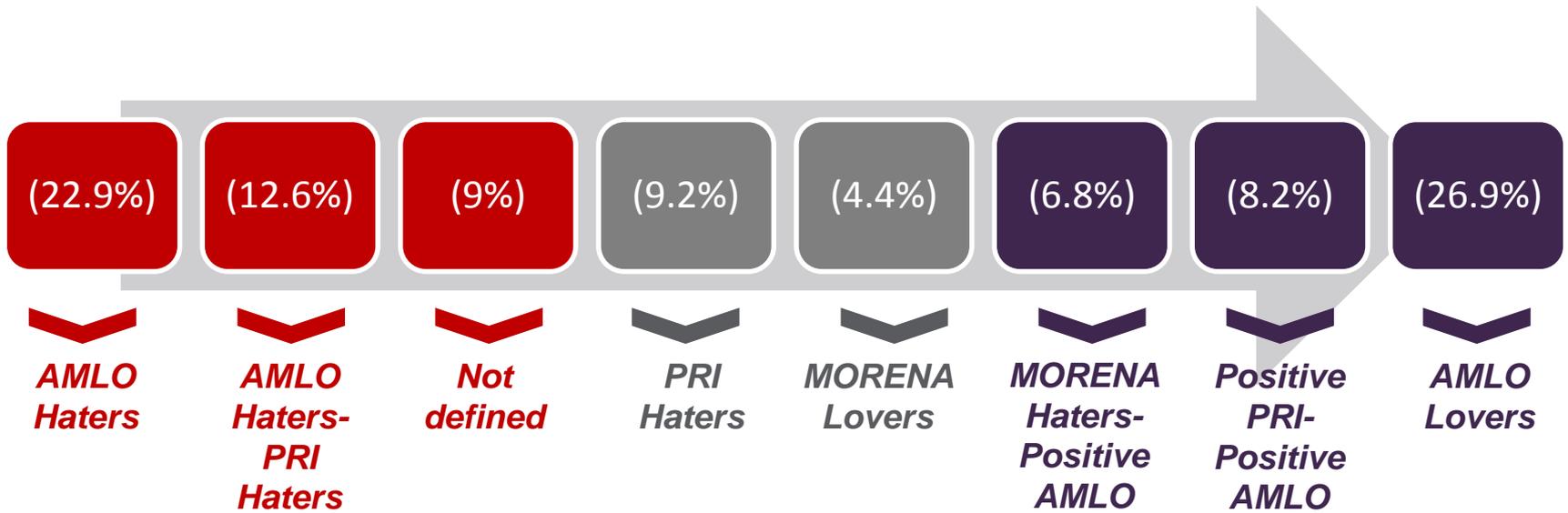
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-3

	Panistas (11%)	Priistas (15%)	MORENAist (10%)	Indep. (56%)
That the PRI wins the election	55	29	94	54
That AMLO win the election	35	65	5	28
Both	8	0	0	11
NR/DK	2	6	1	7
Total	100	100	100	100

*Difference with August survey



AMLO Haters (22.9%)

- **Opinion of López Obrador**
 - Bad (76%).
- **Electoral preference**
 - Most of them vote PRI (34%).
In second place, they vote PAN (22%).
- **Potential vote**
 - 58% could vote PRI, 50% could vote PAN, and 93% would never vote MORENA.
- **Party identification**
 - 54% is independent y 27% Priísta.

MEDOID

Sex: Woman
Ages: 18-29 years
Education: Junior High School
Occupation: Working
Internet: No access
Opinion of Education Reform:
 No response
Opinion of Energy Reform:
 Positive
Peña Nieto's approval: Disapprove
Country's direction: Wrong direction

AMLO LOVERS (26.9%)

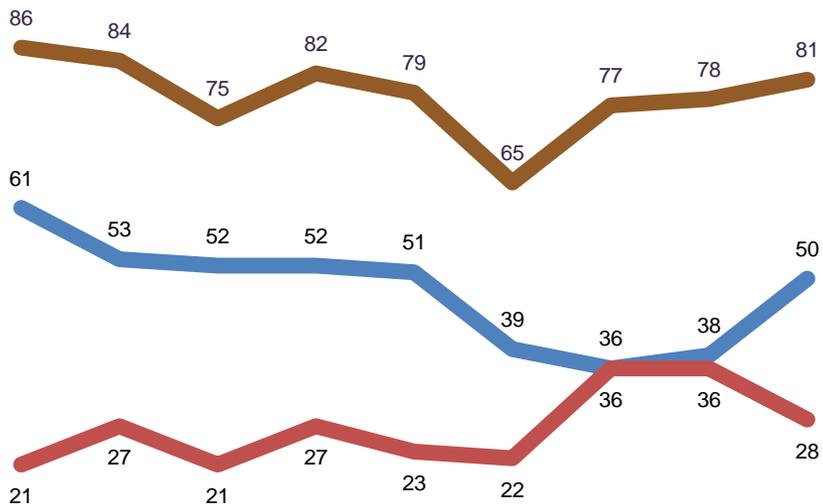
- **Opinion of López Obrador**
 - Good (99%).
- **Electoral preference**
 - Most of them vote MORENA (63%).
- **Potential vote**
 - 100% could vote MORENA, 45% could vote PAN, and 28% could vote PRI.
- **Party identification**
 - 47% is independent y 28% MORENAíst.

MEDOID

Sex: Man
Ages: 40-49 years
Education: High school
Occupation: Working
Internet: With access
Opinion of Education Reform : Positive
Opinion of Energy Reform :
 Negative
Peña Nieto's approval: Disapprove
Country's direction: Wrong direction

EDUCATION REFORM

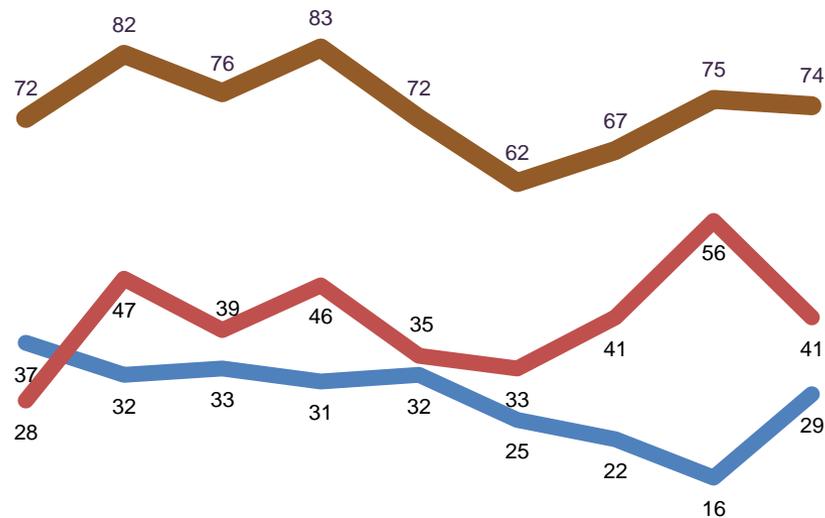
Recognition Positive Negative



NOV 2013 FEB 2014 MAY 2014 AUG 2014 NOV 2015 MAR 2016 AUG 2016 MAR 2017 OCT 2017

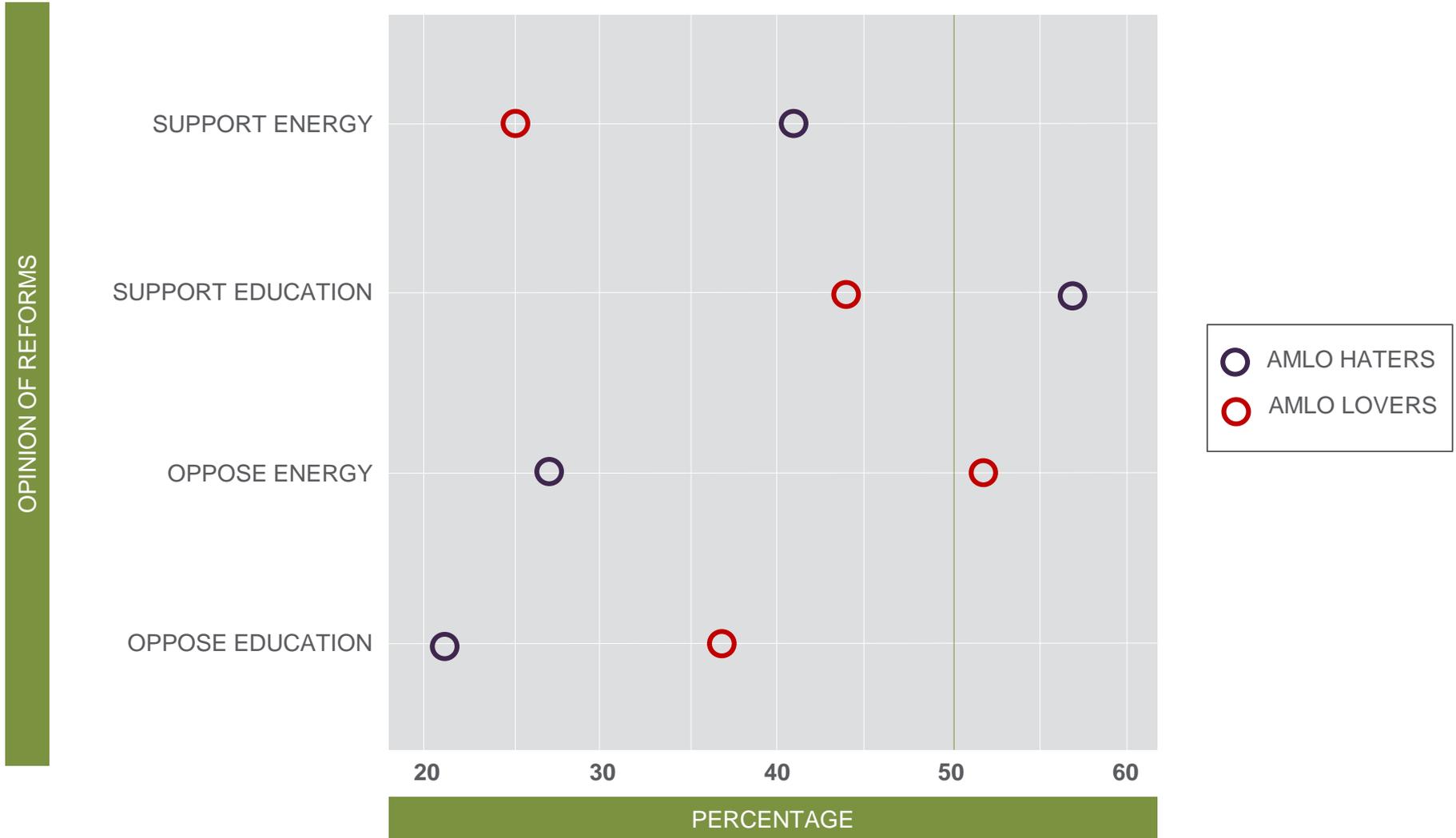
ENERGY REFORM

Recognition Positive Negative



NOV 2013 FEB 2014 MAY 2014 AUG 2014 NOV 2015 MAR 2016 AUG 2016 MAR 2017 OCT 2017

% of NR/DK not shown



1

The race is really close and there is a good chance it will continue to be close

2

This is a fertile ground for negative campaigning

3

The cleavages that structure electoral preferences right now are

- Continuity vs change (PRI vs no-PRI)
- Postures towards AMLO

4

At this moment, policy polarization has not overlapped with candidate polarization (yet)