

Evaluations of the economy in Puerto Rico remain heavily negative, with nine-in-ten (89%) saying conditions are only fair or downright poor

San Juan, PR

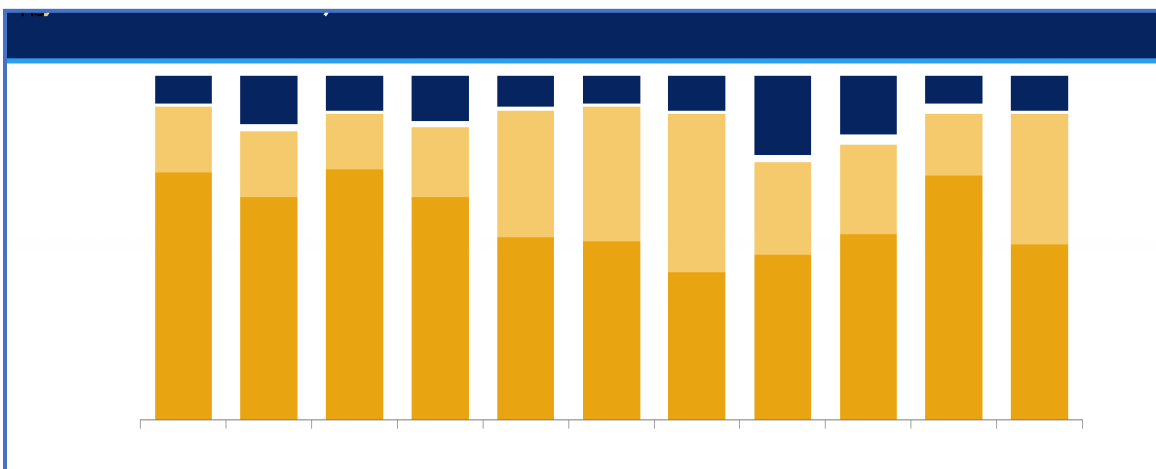
The Puerto Rico Herald obtained the key findings of a survey of Puerto Rico registered and likely voters. The poll was conducted between June 14th to June 21st, 2023 by a nationally recognized public opinion research firm. The poll, not conducted for any candidate or party, included questions on a wide array of important topics, using a scientifically designed sample across all of Puerto Rico regions, age groups, gender and socioeconomic levels to produce reliable findings regarding the current attitudes of registered voters about issues and potential candidates for office.

[Full Poll Summary, Key Findings & Detailed Results](#)

July 21, 2023

CONSUMER SENTIMENT

Evaluations of the economy in Puerto Rico remain heavily negative, with nine-in-ten (89%) saying conditions are only fair or downright poor. Half of voters (51%) rate the economy as poor, which is actually a 20-point decrease from June 2022. Still, only 10% of the electorate give the economy a positive grade.



The vast majority of every major demographic group has negative views of Puerto Rico's economy. Younger voters hold especially grim views: 62% of voters under the age of 35 rate economic conditions as poor.

In another measure of the island’s economic struggles, only one-in-three voters (33%) report having a job (26% full-time, 7% part-time). Just four-in-ten (40%) under age 50 have full-time work. More than half of the electorate (58%) is out of work and not seeking employment.

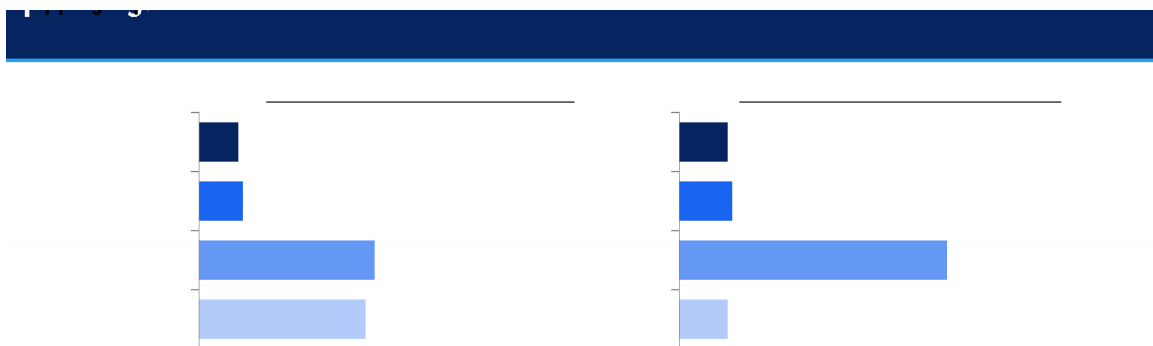
Only one-in-ten voters (10%) plan to make a major purchase within the next six months, the lowest figure since spring of 2020. Higher-income earners (19%), men under 50 (17%) and frequent mall visitors (15%) are more inclined to say they plan to make such a purchase soon.

SHOPPING BEHAVIOR

Roughly four-in-ten residents (43%) say they typically visit a mall at least a few times each month. That is down slightly from the pre-pandemic rate, which was 55% in June 2019 and 56% in June 2018.

Much of this decrease is likely driven by a combination of the pandemic changing shopping behavior and the island’s ongoing economic struggles leaving residents with less money to spend. There are signs of a rebound, however: more than half (52%) say they’ve visited a shopping mall within the last week, and nearly everyone (88%) has been to a mall within the past six months.

Residents continue to spend more money at malls than they do shopping online. Four-in-ten (38%) say they don’t online shop at all, compared to just 11% who do not shop at malls. Still, there is an opportunity for malls to claim more of residents’ shopping budget, as six-in-ten shop at malls but spend less than 25% of their shopping budget there. These numbers have remained relatively stable since September 2021.



Younger residents and those who are either employed part-time or are looking for work are the most likely to visit malls frequently but not spend much of their budget there—these types of shoppers represent an opportunity moving forward.

Higher-income households do more online shopping than other residents, but still do the bulk of their purchasing at malls. The same is true of those under age 50. Still, efforts to target these customers would help guard against losing market share to online shopping in the coming years.

Most residents with a job get paid via direct deposit (69%), while 16% are paid in cash and 14% by check. Consequently, most shoppers either pay with a debit card (38%) or in cash (32%)—those forms of payment are most closely linked to the way workers are paid. Just 11% of shoppers use a credit card.

Residents' negative views about conditions on the island continue—most think things are bad and getting worse. Crime/drugs, inflation, and corruption have been top concerns for years; the electrical grid can now be added to the list. Political corruption remains a hugely important issue—it is very concerning to a staggering 97% of voters under age 35 (it is likely no coincidence that young voters are also the least likely to identify with one of the main political parties).

These conditions have not been helpful for Governor Pierluisi's political prospects. Twice as many voters disapprove of the job he's doing as approve, and a majority dislikes him personally.

By contrast, Jenniffer González remains the most popular politician on the island. Her job approval (62%) and personal favorability (65%) ratings have slipped slightly in the past year but remain quite strong.

If González does decide to run for governor, at this point the job looks like hers for the taking. She has more than double Pierluisi's support in a potential primary matchup (63-26%). Pierluisi primary supporters would mostly back her in the general election, whereas her voters might not turn out for Pierluisi in the general if he wins the primary.

González also leads potential general election matchups for governor by roughly 30 points. Pierluisi's leads in the same hypothetical matchups are just 10 points. Simply put: if Pierluisi is the nominee, the PNP faces a very difficult road to retaining the governorship; if González is the nominee the PNP would be the odds-on favorite.

The PPD primary for governor is wide open. David Bernier holds a modest lead, but no candidate has anywhere near majority support and the race looks to be quite fluid.

Voters are at least somewhat aware of the MVC-PIP alliance, but the union does not (at present) appear to be attracting *new* voters to the third-party cause. Instead, the risk to the main political parties is the consolidation of the third-party vote behind one candidate (rather than it being dispersed across two or more individuals). That risk bears monitoring as the field of candidates gets set and the election heats up.

If González runs for resident commissioner rather than governor, she is currently in a very strong position to win reelection. If she runs for governor, however, the resident commissioner race could be very competitive. The PNP primary is very

unsettled, and an unpopular nominee (Rosselló) or an unknown nominee (the rest of the potential PNP field) could be in for a tight race against the PPD's nominee.

DETAILED FINDINGS

THE POLITICAL ENVIRONMENT

Residents remain very pessimistic about conditions on the island. Just 7% (tied for a record low) think things are getting better, while nearly two-thirds (63%) think things are getting worse. Most (89%) say economic conditions are only fair or poor. The same number felt that way about economic conditions a year ago, although fewer say conditions are outright poor this year (51%) than last (71%).



Crime and drug addiction, political corruption, and economic concerns have long been at the top of residents' list of concerns. Power service disruptions have now emerged as an additional top-tier issue, cited as very concerning by 75% of residents.

While voters in every demographic group find these top issues very concerning, crime is a more potent concern for those over age 50, while inflation and power service disruptions hit hardest for younger residents. Importantly, a *staggering* 97% of those under 35 say they are very concerned about political corruption—which likely contributes to their preference for third-party political candidates.

As has historically been the case, status does not register as a top concern, as residents are more preoccupied with the issues that directly impact their life on a day-to-day basis.

VIEWS OF KEY POLITICAL LEADERS

PNP Politicians

When things are going poorly and not getting noticeably better, voters tend to punish those in power. That is the case here, as twice as many disapprove of the job Governor Pierluisi is doing

(62%) as approve (30%). These ratings are similar to residents' evaluations throughout most of his term.

However, the governor's personal favorability (36% favorable, 58% unfavorable) has fallen off a cliff. From 2016-2021, his favorability hovered around 55%; this 20-point decline is another major warning sign for his reelection chances. The largest declines in the governor's favorability over the past two years have come from men, seniors, and more educated/affluent voters.



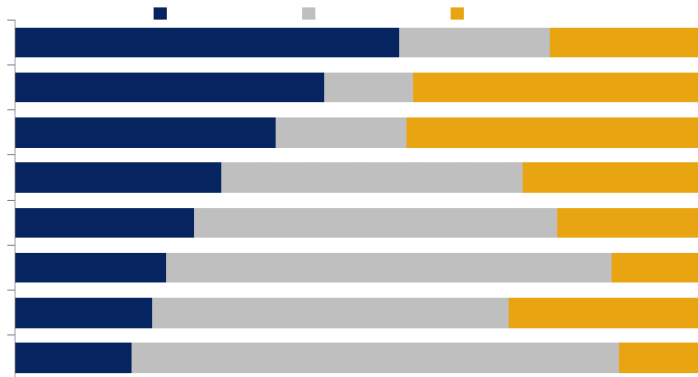
Jennifer González, by contrast, remains the most popular political figure on the island. Two-thirds (65%) view her favorably and nearly as many (62%) approve of the job she is doing as resident commissioner. Each of these numbers is down slightly since last year, however, and evaluations of her job performance have been slowly declining since mid-2020. Her profile bears careful monitoring moving forward.

PPD Politicians

David Bernier enjoys the best favorability ratings among PPD political leaders, as nearly twice as many hold a favorable view (56%) as have an unfavorable opinion (22%).

Views of Alejandro García Padilla and José Luis Dalmau are mixed—most voters have heard of these figures but favorable views are roughly equal to unfavorable ones.

There is also a large group of relatively unknown PPD leaders: roughly half of voters or more can't rate Juan Zaragosa, Jesús Manuel Ortiz, Pablo Jose Hernández, Charlie Altieri, and Luis Javier Hernández.



With the exception of Bernier, none of these profiles are nearly as strong as Jennifer González's.

Third-Party Politicians

Voters hold mixed views of PIP leader Juan Dalmau (41% favorable, 40% unfavorable), while negative views of MVC leaders Manuel Natal and Alexandra Lúgaro outnumber positive opinions by a two-to-one margin.



Voters are at least vaguely aware of the PIP/MVC alliance—21% have heard a lot about it and another 50% have heard a little. At present, however, the alliance is not making a significant political impact. Just as many voters (14%) say the alliance makes them *less* likely to vote for a PIP/MVC alliance candidate as say the union makes them *more* likely to do so (14%).

Young voters and those who prefer independence for Puerto Rico—groups who were already more inclined to back third-party candidates—are the most likely to say the alliance increases their likelihood of supporting a third-party candidate. One-in-five of those who prefer free association (21%) feel similarly, as do just 10% of those who prefer statehood.

At present, the alliance does not appear to be attracting new third-party voters (although this could change in the heat of a political campaign and/or if the alliance found a charismatic, broadly appealing leader). Instead, the risk it poses is the *consolidation* of the third-party vote behind a single candidate.

THE 2024 GOVERNOR'S RACE

PNP Primary

If she decides to run, Jenniffer González would hold a commanding lead in the PNP gubernatorial primary with 63% of the vote, compared to 26% for Pierluisi.

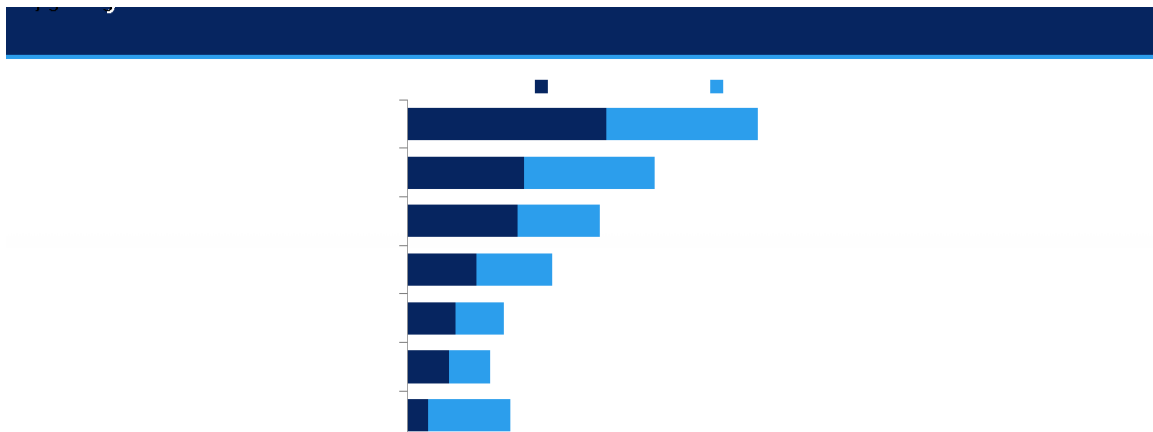
González leads in every region and with every demographic group—including, perhaps most tellingly, PNP voters who approve of the job Pierluisi is doing as governor. Put another way: even the governor's fans would prefer González. Her strongest groups in the primary include women, younger voters, and less educated/affluent residents.

Crucially, the bulk of those who support Pierluisi in the primary (68%) would still vote for González in the general elections if she wins; just 9% would defect to another party's candidate and 15% would not vote. By contrast, many of González's supporters (37%) would sit out the general election if she does not win; just 41% would back Pierluisi.



PPD Primary

The PPD primary for governor is entirely unsettled. In an initial ballot test, Bernier leads with 29% of the vote and Ortiz and Padilla are within striking distance in the mid-teens—but Bernier's low overall share of the vote makes this an extremely fluid race.



Asking PPD partisans' second choice in the primary gives a sense of which candidates are currently under consideration. By that metric, most are still in the running—though Bernier's position looks more promising at this point than Zaragosa, Altieri, and Dalmau's.

General Election

If Jenniffer González decides to run, she would enter the race as a strong favorite. In a hypothetical matchup against Altieri as the PPD candidate, Juan Dalmau as the PIP/MVC candidate, and César Muñiz, she holds a 33-point lead. Her position is nearly identical if Zaragosa is the PPD nominee.

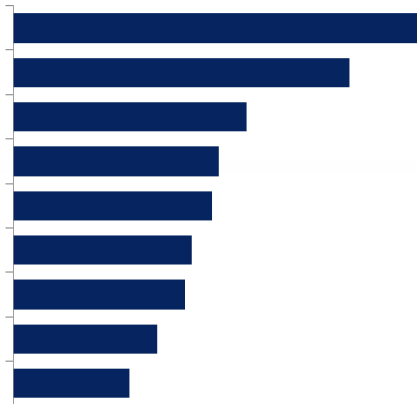
If Pierluisi is the PNP nominee, however, the race for governor would be wide open. In the same hypothetical matchup, he holds just a 12-point advantage. An incumbent with just 25% of the vote and job approval/favorability numbers in the low 30s would face a very difficult path to reelection.



Most of the dropoff in PNP support if Pierluisi is the nominee is from residents saying they would not vote, which confirms the finding that many of those who would support González in the primary would not back Pierluisi in the general if he wins.

Women, those who rent their homes, less affluent residents, and those who do not identify as Roman Catholic are the most at risk of staying home or defecting to another party if Pierluisi is the nominee.

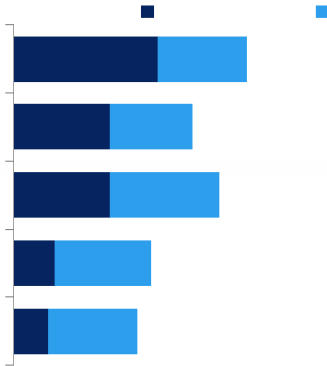
The poll did not test matchups against all the possible PPD nominees. However, a 59% majority of residents are confident that González would do a good job as governor. Bernier (49% confident) is the only other candidate that comes close; every other candidate tested is at 34% or less.



THE 2024 RESIDENT COMMISSIONER'S RACE

If González decides against a run for governor, she would enter a reelection campaign as a strong favorite: 51% would back her, compared to just 19% for presumptive PPD nominee Pablo José Hernández and 9% for a PIP/MVC nominee.

If she runs for governor, however, the PNP primary for resident commissioner looks highly competitive. Ricky Rosselló, Larry Seilhammer, and William Villafañe form the top tier of candidates, and when voters' second choices are considered the race looks even more wide open.



It is worth remembering that Ricky Rosselló's favorability stood at 11% favorable, 81% unfavorable in our polling immediately after the scandals and subsequent protests that removed him from office. Time out of the spotlight may have rehabilitated Rosselló's image somewhat but, if he gets the nomination, his PDP opponent will undoubtedly remind voters of his transgressions. At a time when political corruption is of extreme concern to voters, this could become a major liability not just for Rosselló, but the PNP ticket.

We do not yet have favorability data on the other potential PNP nominees.

A general election for resident commissioner without Jenniffer González in the race looks considerably different. Whereas she holds a 32-point lead over Pablo José Hernández if she runs for resident commissioner, a generic PNP candidate would hold just a 6-point advantage, with 20% of residents saying they would not vote and another 15% undecided. In short, the resident commissioner race will be one to monitor closely if she decides to run for governor.