

Independent Voter Project

Wave 10 Presentation of Findings

February 28-March 7, 2012



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Abbreviation Key

DEM	Democratic voter/candidate/party
DLI	Democratic-leaning independent
DNK	Do not know
All IND	All Independents
Pure IND	Pure independent
REP	Republican voter/candidate/party
RLI	Republican-leaning independent
TPS	Tea Party supporter
OWS	Occupy Wall Street supporter



Background & Objective

Why Study Independents?

Independents are a critical voting bloc in American politics. About one-third of registered voters identify as independents, so swings among this group towards one party or another often determine election outcomes. Significant attitudinal differences exist, however, within the independent bloc. Lumping them together misses important patterns and potential opportunities for both political parties.

Research Objective

To better understand the political landscape of the country, this effort builds on previous waves of research to understand and track the political attitudes and views of registered voters, particularly Independent and unaffiliated voters. Wave ten includes modules testing voter opinions on the economy and economic impact strategies, as well as their impressions of companies and corporate responsibility actions.

The following presentation is commissioned and prepared by Altria Client Services and contains data from ten waves of public opinion surveys conducted on the political landscape and the attitudes of self-identified independent voters.



Methodology

Trained interviewers at Voter / Consumer Research's (VCR) phone center in Houston, Texas conducted this survey of n=1,369 registered voters nationwide between February 28th and March 7th, 2012. The total sample consists of a base sample of n=801 registered voters plus an oversample of 568 self-identified independent voters to reach a total of n=800. The margin of error for the base and independent sample is +/- 3.5% at the 95% confidence interval. This increases to +/- 4.9% for split samples (n=400), and to +/- 5.2% for pure independents (n=356).

VCR selected respondents randomly from a registered voter sample including both cell phone and landline telephone numbers. All respondents confirmed that they are registered to vote.

Quotas were set for gender, age, race and census region to ensure consistency with previous waves and national demographic trends. Party identification for the base sample of registered voters is 36% Democrat, 29% independent, and 32% Republican, and is weighted to align with national party identification for consistency with previous waves.



Executive Summary

Political Environment

The national mood shows improvement since September's survey, along with President Obama's approval ratings and ballot performance. At the same time, the Republican brand shows signs of erosion, particularly among pure independents.

- Economic measures showing an improved unemployment rate and growth in stock market returns help explain the significant improvement in the nation's mood. Since our last survey in September, voters are more optimistic about the direction of the country, and are more approving and supportive of the Democratic Party's leadership.
- Republican leadership does not fare as well, partly due to criticism over their handling of the Payroll Tax Cut extension, and the high number of primary debates showing Republican candidates fighting over their party's base. As such, Republican approval and ballot support remain low overall, and show significant decline among pure independents.



...Executive Summary...

Election 2012

Recent improvement in the national mood does not mean certain victory for the President or defeat for Republicans; both face challenges leading up to the November election.

- President Obama now leads the generic Republican on the presidential ballot by 3 points, 44 to 41, although this lead is within the margin of error. His 5-point lead among pure independents is also within the margin of error for this subgroup.
- The generic Republican loses its September lead to now tie the generic Democratic candidate at 41% among voters and 29% among pure independents.
- However, Barack Obama's re-election will largely depend on continued economic improvement, much of which is outside of his immediate control (i.e., gas prices rising, Europe's sovereign debt crisis).
- Republicans face the challenge of appeasing their base, but not at the expense of independents. Mitt Romney's post-Super Tuesday lead in the Republican primary may help the Republican Party overcome this challenge, since the Republican base tends to fall in line once the nominee is decided, and because our data shows that Romney is the most appealing Republican candidate to independents who plan to vote in the GOP primary.



...Executive Summary...

Economy

With regards to the economy, voters remain wary of large government and maintain a pro-business attitude.

- This attitude is exemplified by the hope that Americans put in business, over government, to help the economy recover. A large majority of voters agree that businesses will have a greater positive impact on the economy than government (77% business, 18% government).
- New data from this wave show that voters, and Republican voters in particular, view actions that will bolster business as the most important for economic recovery.



...Executive Summary...

Corporate Responsibility

Impressions of Companies

- Altria has low awareness (19%) and a soft, yet neutral image among voters overall (5% favorable impression, 4% unfavorable impression).
- Food and Beverage companies are most favored by respondents, with Kraft Foods (79%), Coca-Cola (78%), Pepsi (76%), and Anheuser-Busch (60%) topping the list. Republican respondents, especially, have more favorable opinions of *all* companies evaluated than their Democratic counterparts. Respondents have the most *unfavorable* impression of Bank of America (51%), with Philip Morris USA (46%) and Exxon Mobile (45%) close behind.

Socially-Responsible Corporate Actions

- While all potential company actions evaluated are of importance to a majority of respondents, data indicate that the further a potential company action is from a company's core business operation, the less likely respondents are to view it as "extremely" or "very" important.
- For example, *help solve social problems that concern the products and services they sell* (54% extremely/very important) is not deemed as important as *investing in developing their employees* (81%). The exception is the action *demonstrate strong financial performance*, which is important to the core operation of any business, but is not high on respondents' list of important socially-responsible company actions (61%). Independents, in particular, are less likely than voters overall to indicate this action is important (51%).



Section 1 Political Environment

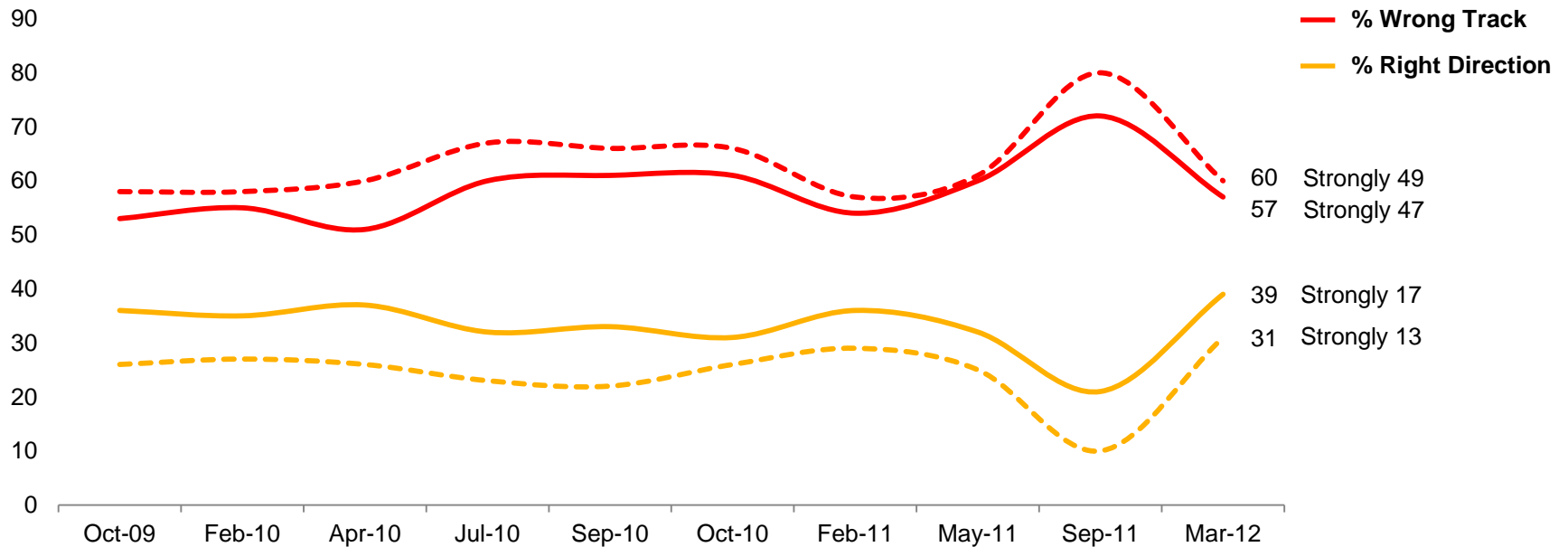


The national mood improves

Now thinking more generally about the direction of the country, would you say things in this country are [ROTATE] heading in the right direction ...or... off on the wrong track? [PROMPT:] And do you feel strongly about that or just somewhat?

Direction of Country

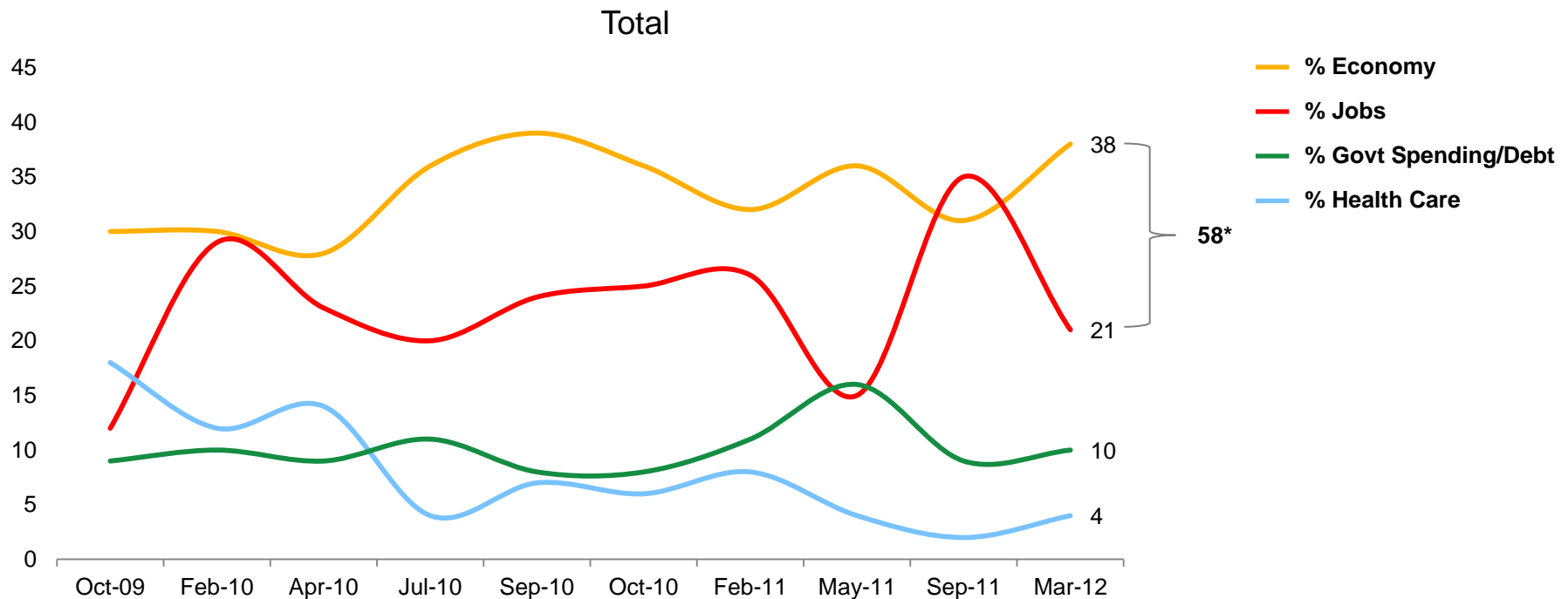
- Total, -- Pure IND



Concern over Jobs falls while economic concerns rise

What would you say is the single most important problem facing the nation [OPEN-ENDED]?

Most Important Issue

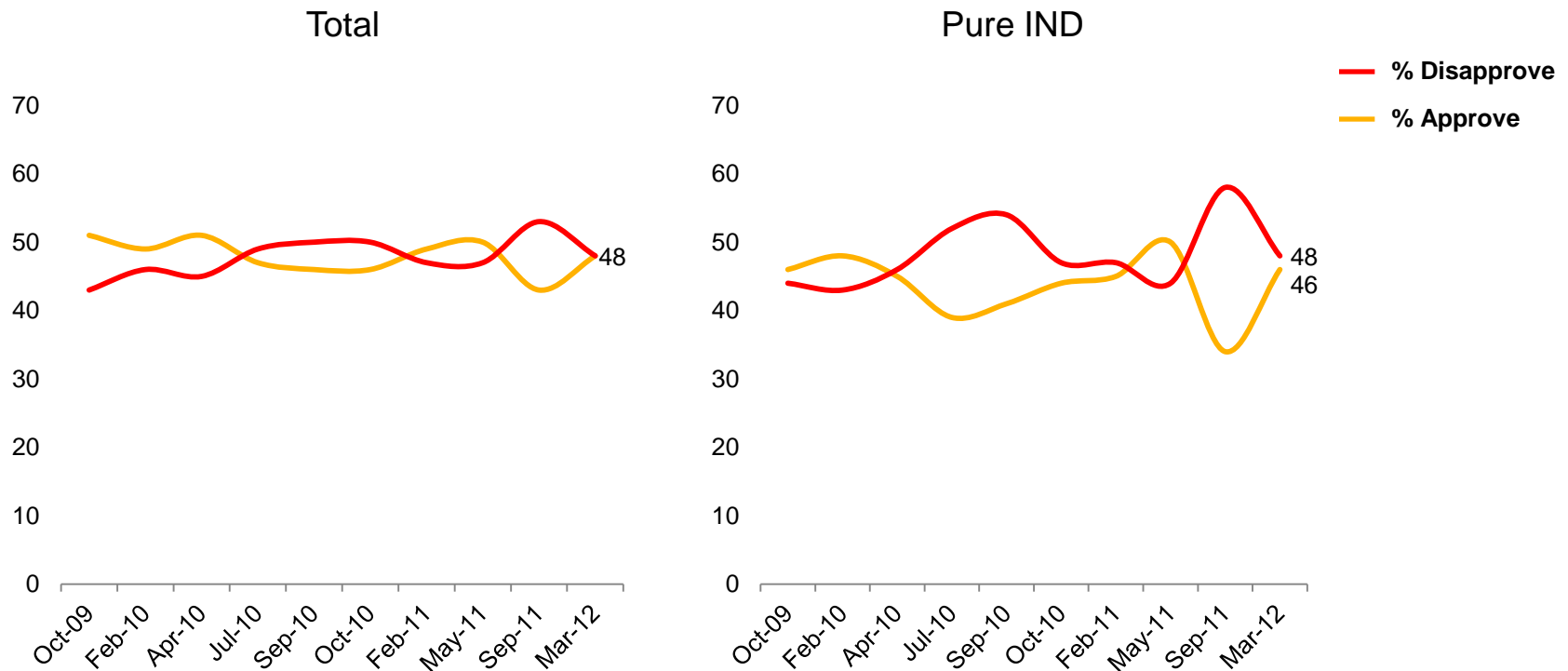


*Note: Percentages may not total due to rounding.

Voters are more approving of President Obama

Do you approve or disapprove of the way Barack Obama is handling his job as President? [PROMPT:] And do you strongly [approve/disapprove] or just somewhat [approve/disapprove]?

Job Approval: President Obama

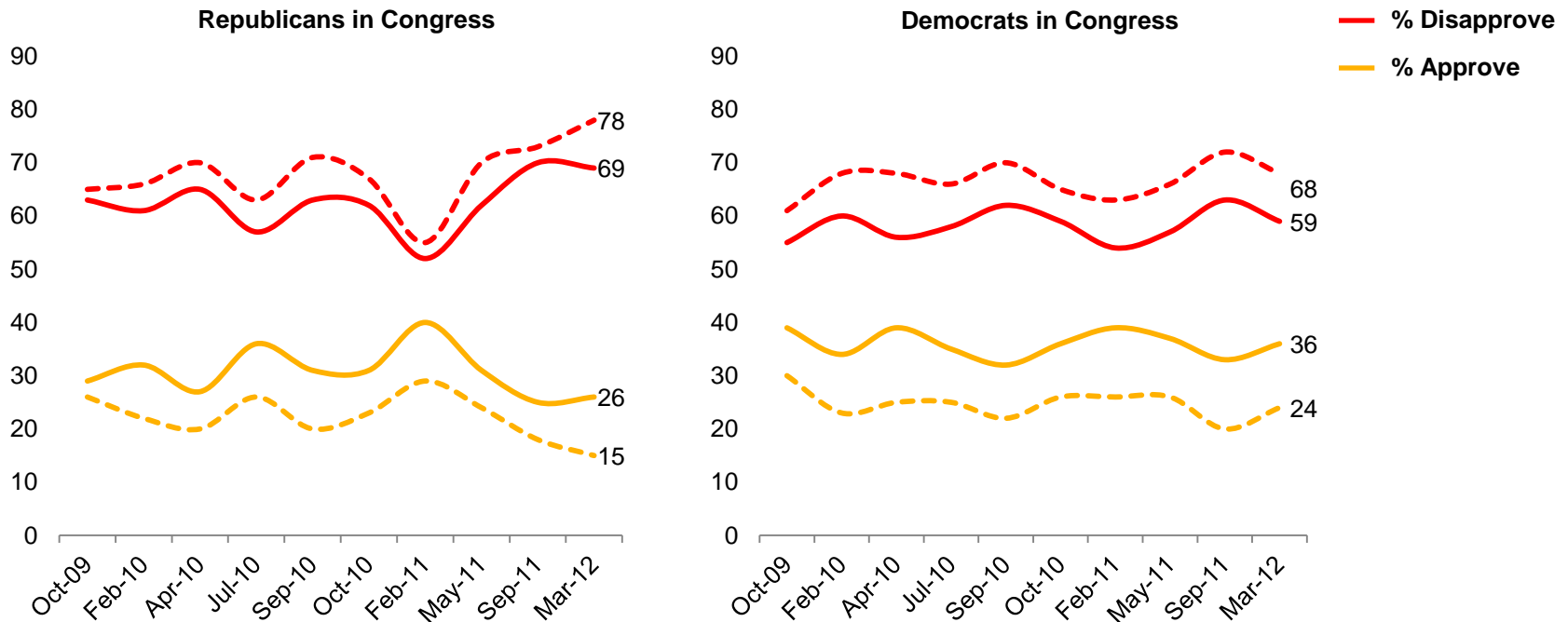


Congressional DEM job approval improves, while REP job approval falls to a new low among Pure IND

Do you approve or disapprove of the way Republicans/Democrats in the U.S. Congress are handling their job? [PROMPT:] And do you strongly [approve/disapprove] or just somewhat [approve/disapprove]?

Job Approval: Congress

-Total, --Pure IND



More voters prefer smaller government and think the government is doing too much

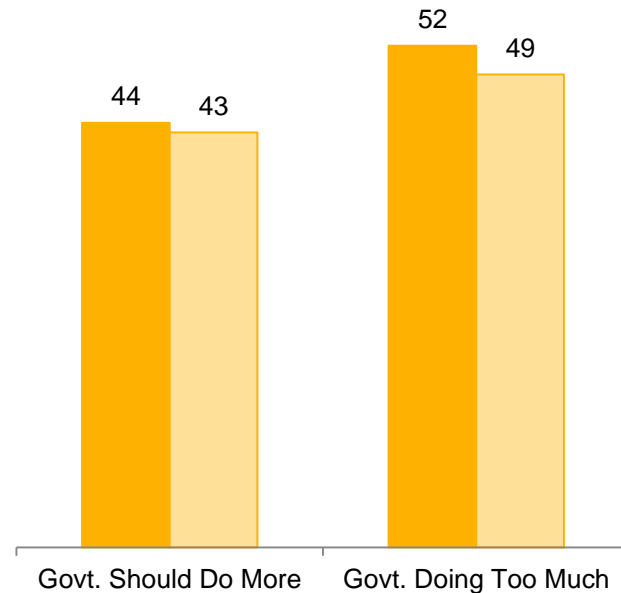
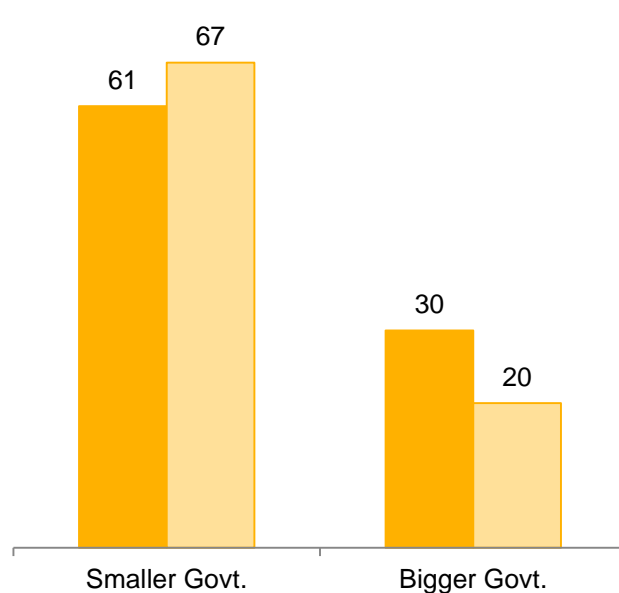
In general, do you prefer [ROTATE]: Bigger government with more services; OR Smaller government with fewer services?

Which statement comes closer to your point of view: [ROTATE:] Government should do more to solve problems and help meet the needs of people; OR Government is doing too many things better left to businesses and individuals?

Preference for Government Size

Preference for Government Role

■ % Total, ■ % Pure IND

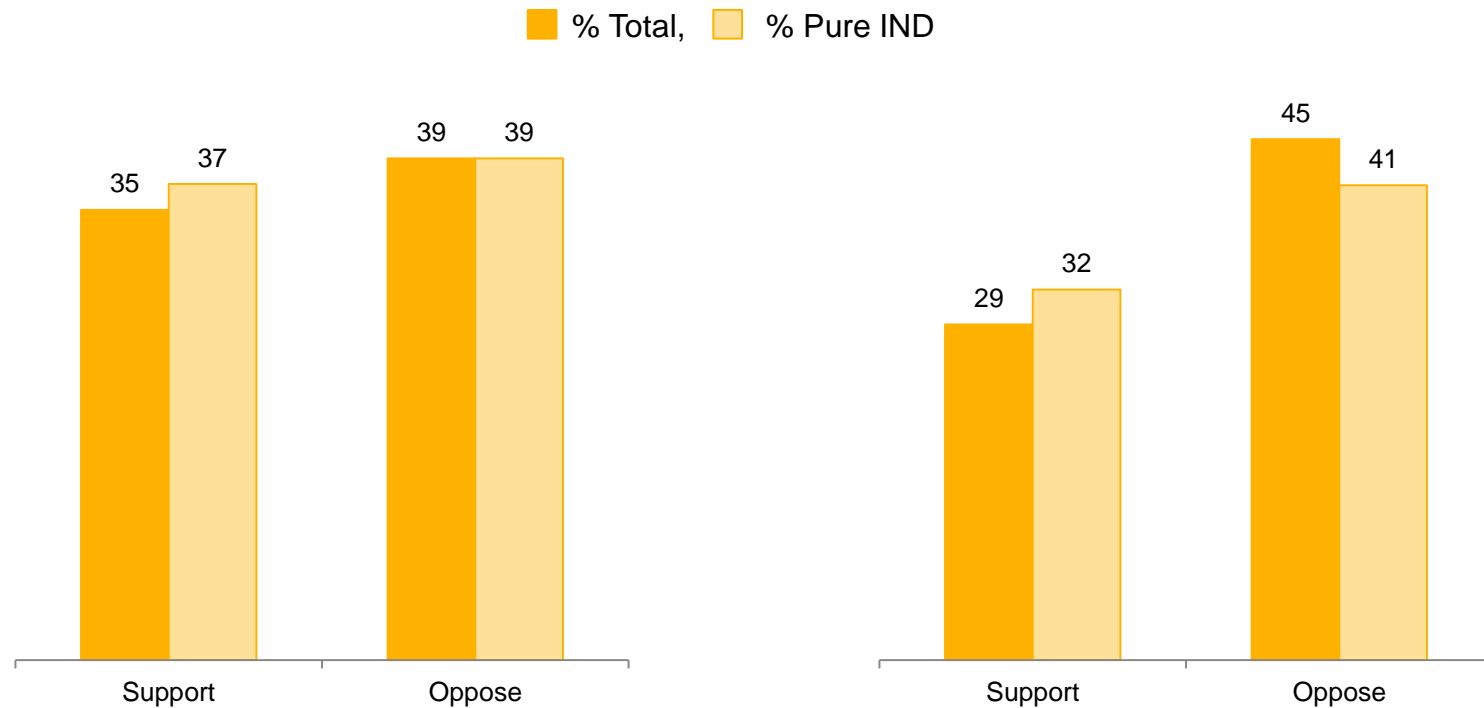


Pure IND are more supportive of the Tea Party than Occupy Wall Street

You may have heard discussion of the Tea Party/Occupy Wall Street movement. Based on what you've seen, read, or heard, do you [ROTATE] support or oppose the Tea Party/Occupy Wall Street movement? If you are not familiar with the Tea Party/Occupy Wall Street movement, just say so. [PROMPT:] And do you strongly [support/oppose] or just somewhat [support/oppose] the Tea Party/Occupy Wall Street movement?

Tea Party Support

Occupy Wall Street Support



Section 2 Election 2012

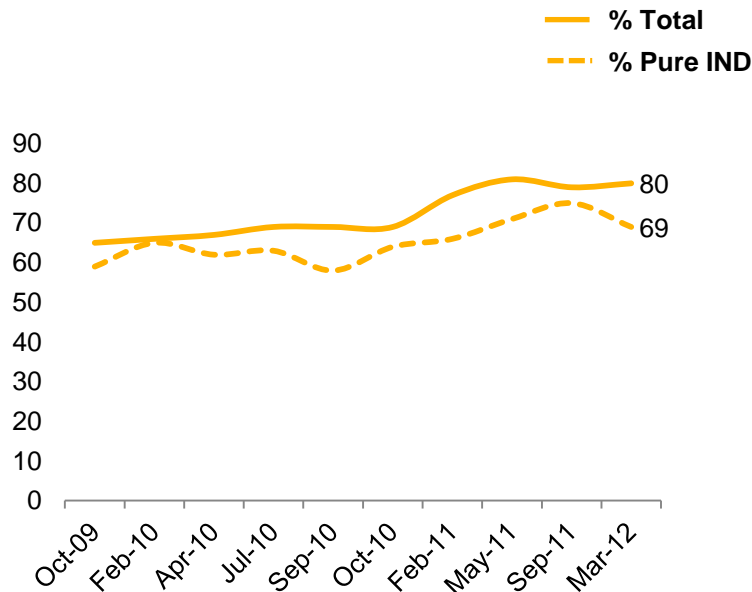


Voting intensity drops among Pure IND, rises among DEM

As you know, there will be a general election for president and U.S. Congress this November. I know it's still a ways off, but would you say you are extremely likely to vote, very likely to vote but not extremely likely, somewhat likely to vote, or not too likely to vote? [Note: Question was "...there will be an election for U.S. Congress in November 2010..." in waves 10/09 – 10/10]

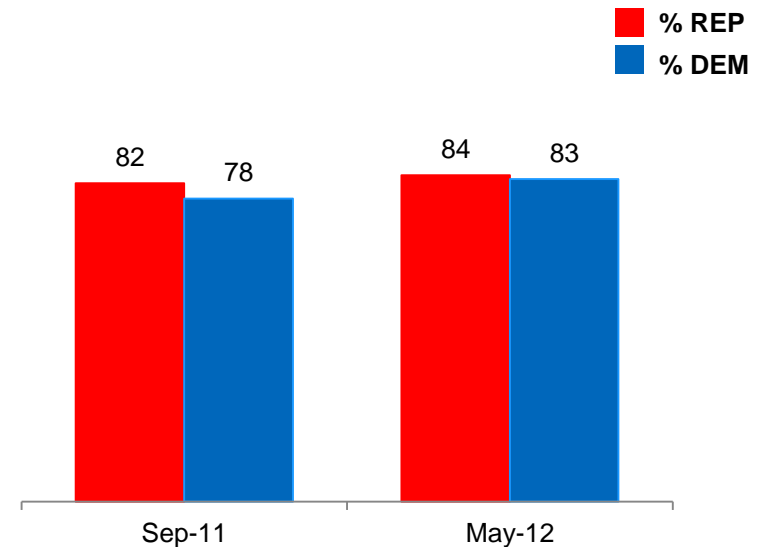
Vote Intensity Trendline

"Extremely Likely to Vote"



Vote Intensity Advantage

"Extremely Likely to Vote"

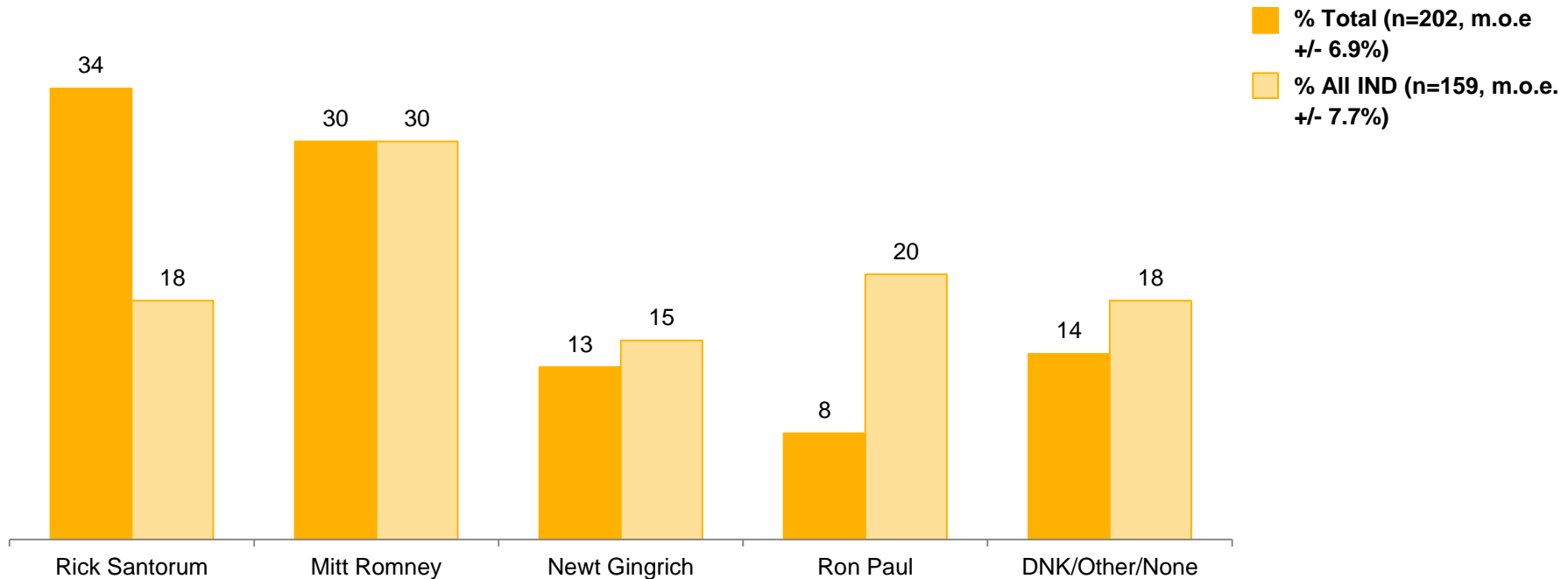


Independents favor Romney for the GOP nomination

[ASK ONLY OF RESPONDENTS RESIDING IN AL, AR, CA, CT, DE, DC, HI, IL, IN, KS, KY, LA, MD, MS, MT, NE, NJ, NM, NY, NC, OR, PA, RI, SD, TX, UT, WV, and WI.] If the Republican presidential primary/caucus were held today, for whom would you vote if the candidates were: [RANDOMIZE] Mitt Romney, Newt Gingrich, Ron Paul or Rick Santorum?

Republican Primary Ballot

Self-Identified Republican Primary Voters

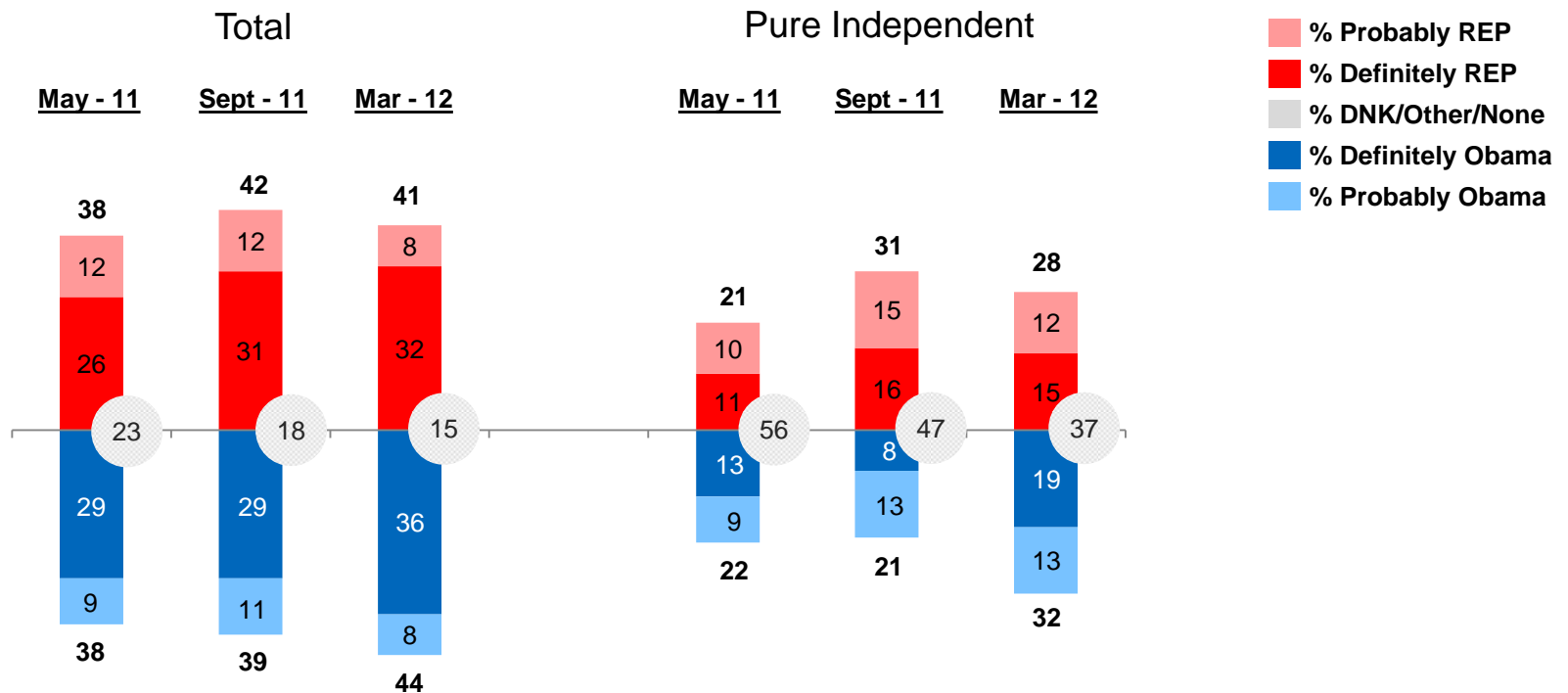


Note: Percentages may not total due to rounding.

Independents tip presidential ballot in Obama's favor

Thinking about the 2012 Presidential election, do you think you will [ROTATE: Vote for President Obama, the Democratic candidate; OR Vote for the Republican candidate]? [IF OBAMA ASK: Would that be definitely President Obama or probably President Obama]? [IF REPUBLICAN, ASK: Would that be definitely the Republican or probably the Republican]?

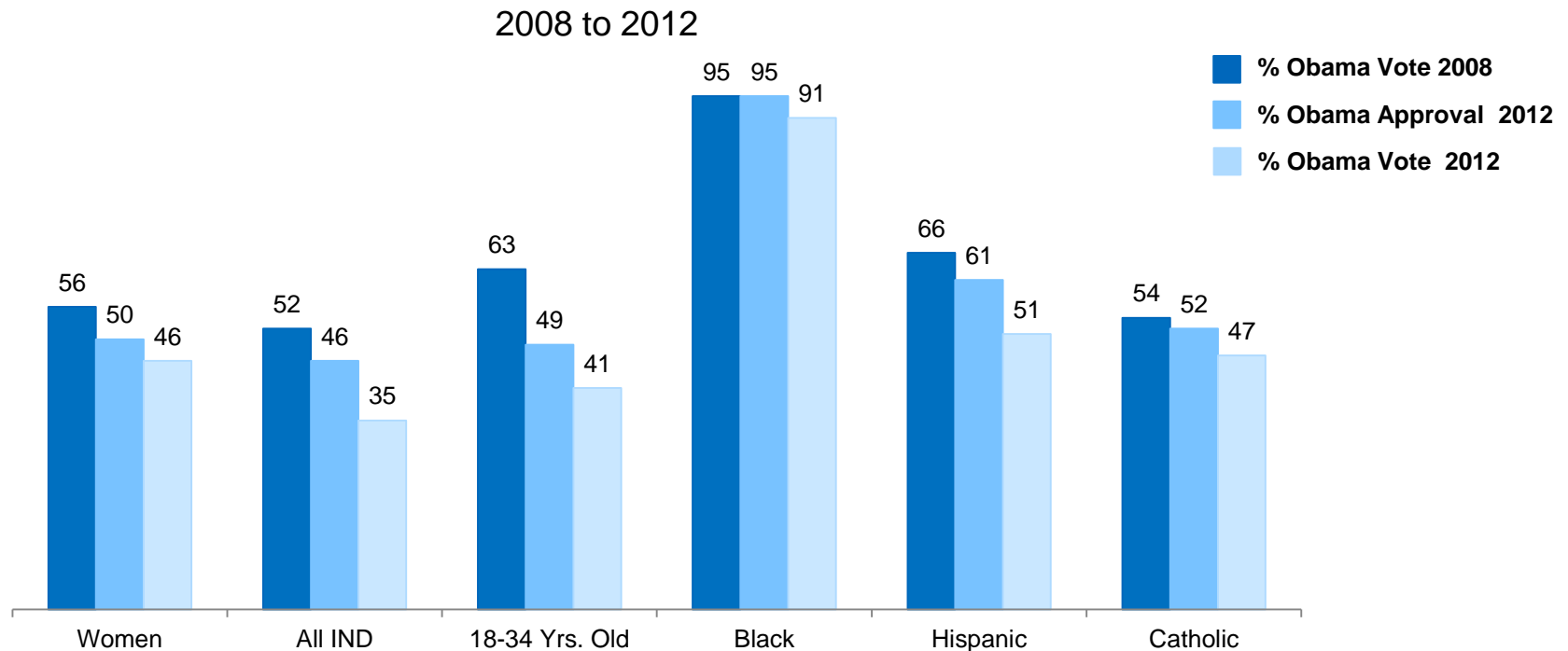
Presidential Ballot



Note: Percentages may not total due to rounding.

The President underperforms among key groups

President Obama Performance Comparison



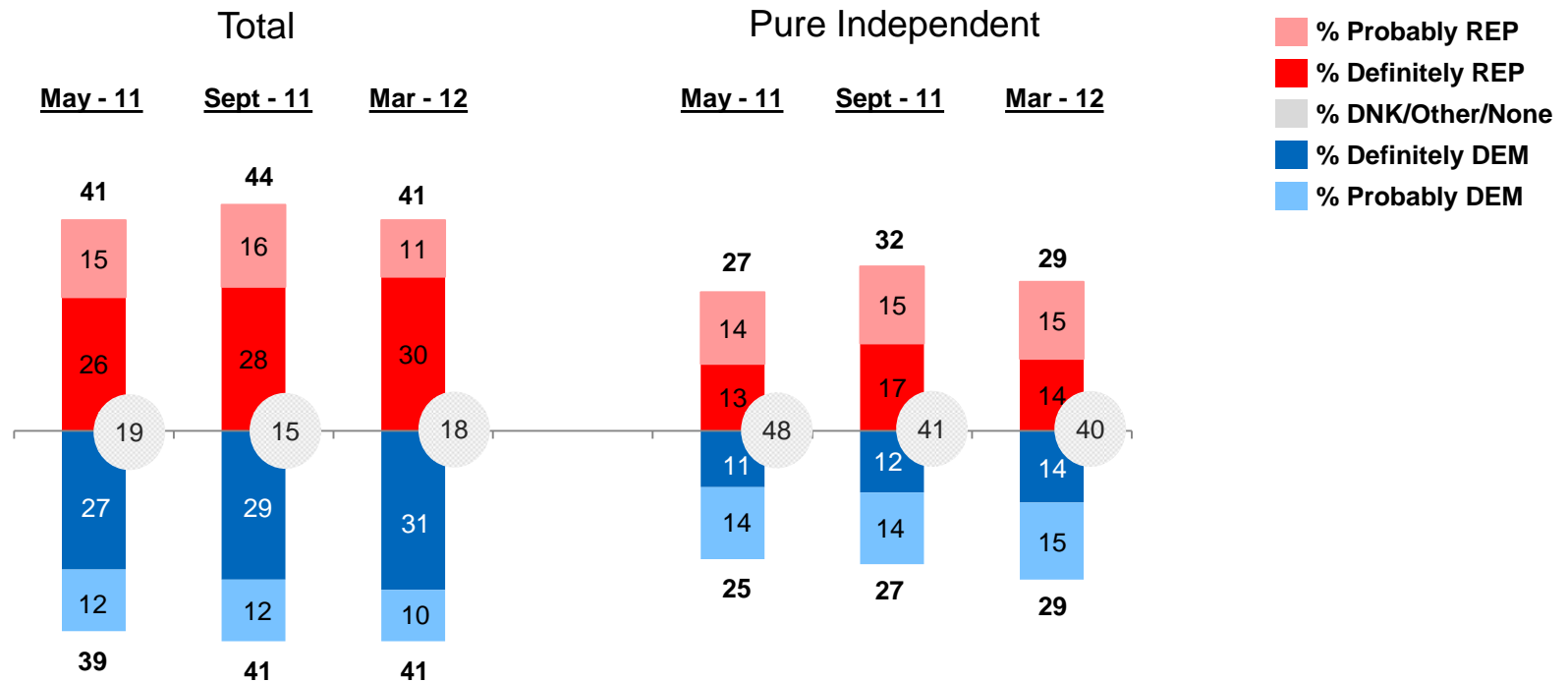
Source: 2008 National Exit Polls (CNN, New York Times)



The generic congressional ballot is tied

Now, thinking about the next election for U.S. Congress in 2012. If it were being held today, would you vote for [ROTATE: the Republican candidate; OR the Democrat candidate] in your district? [IF REPUBLICAN, ASK: Would that be definitely the Republican or probably the Republican?] [IF DEMOCRAT, ASK: Would that be definitely the Democrat or probably the Democrat?]

Congressional Ballot

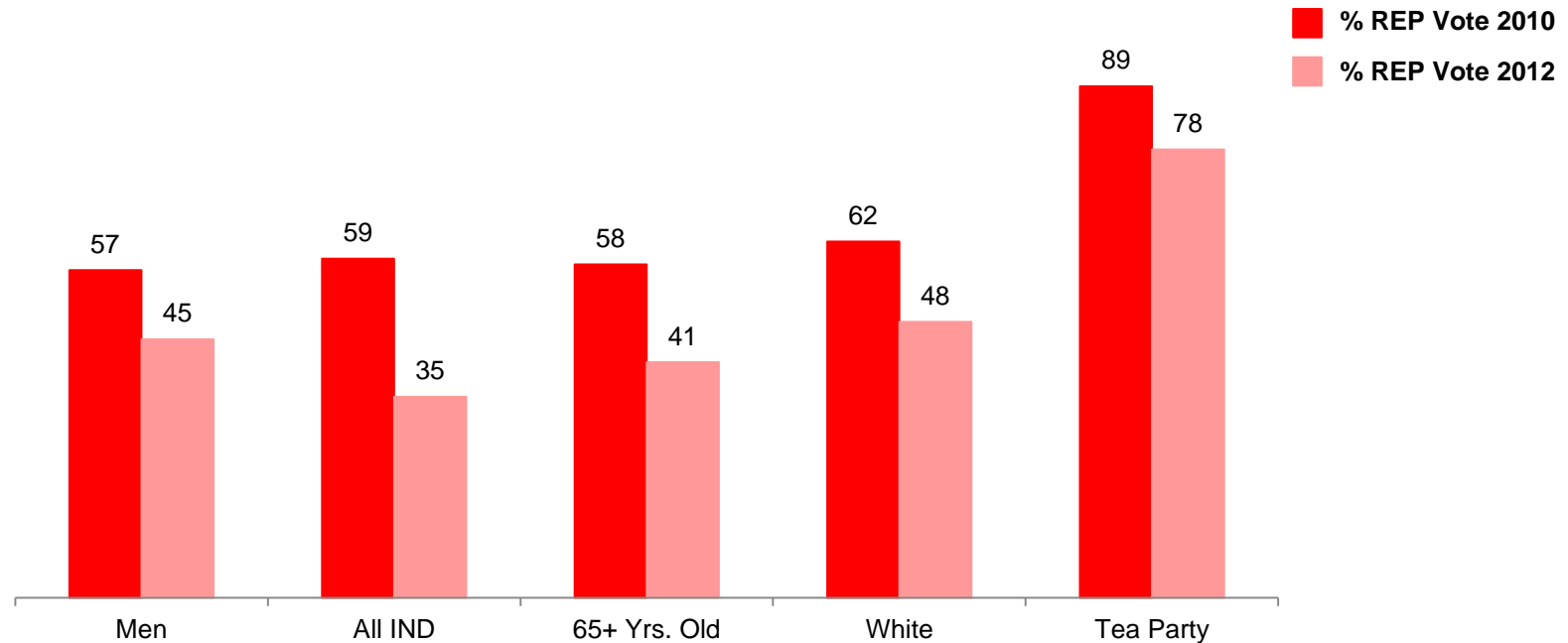


Note: Percentages may not total due to rounding.

The generic Republican underperforms among key groups

U.S. House Republican Performance Comparison

2010 to 2012



Source: 2010 National Exit Polls (CNN, New York Times)



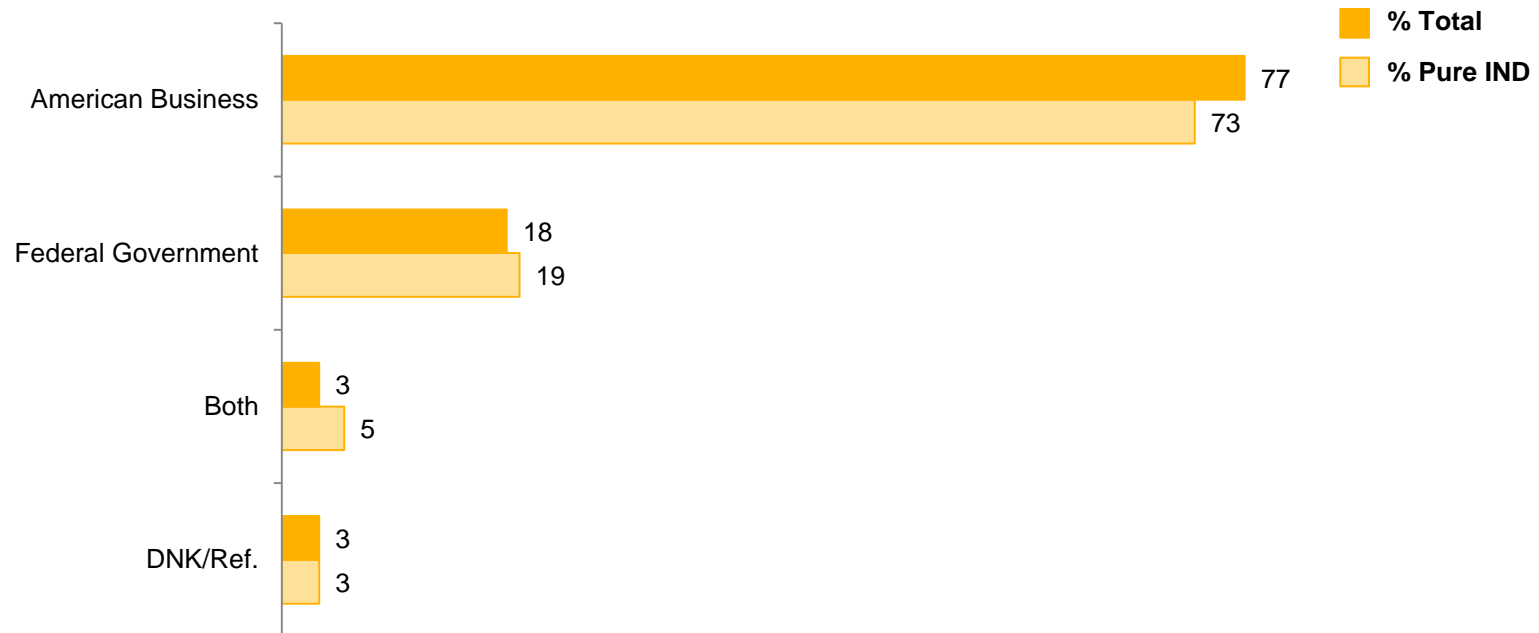
Section 3 Economy



Voters put faith in American businesses for economic recovery

In your view, which one of the following will have a greater positive impact on U.S. economic recovery? [ROTATE:] American businesses...or...the Federal government?

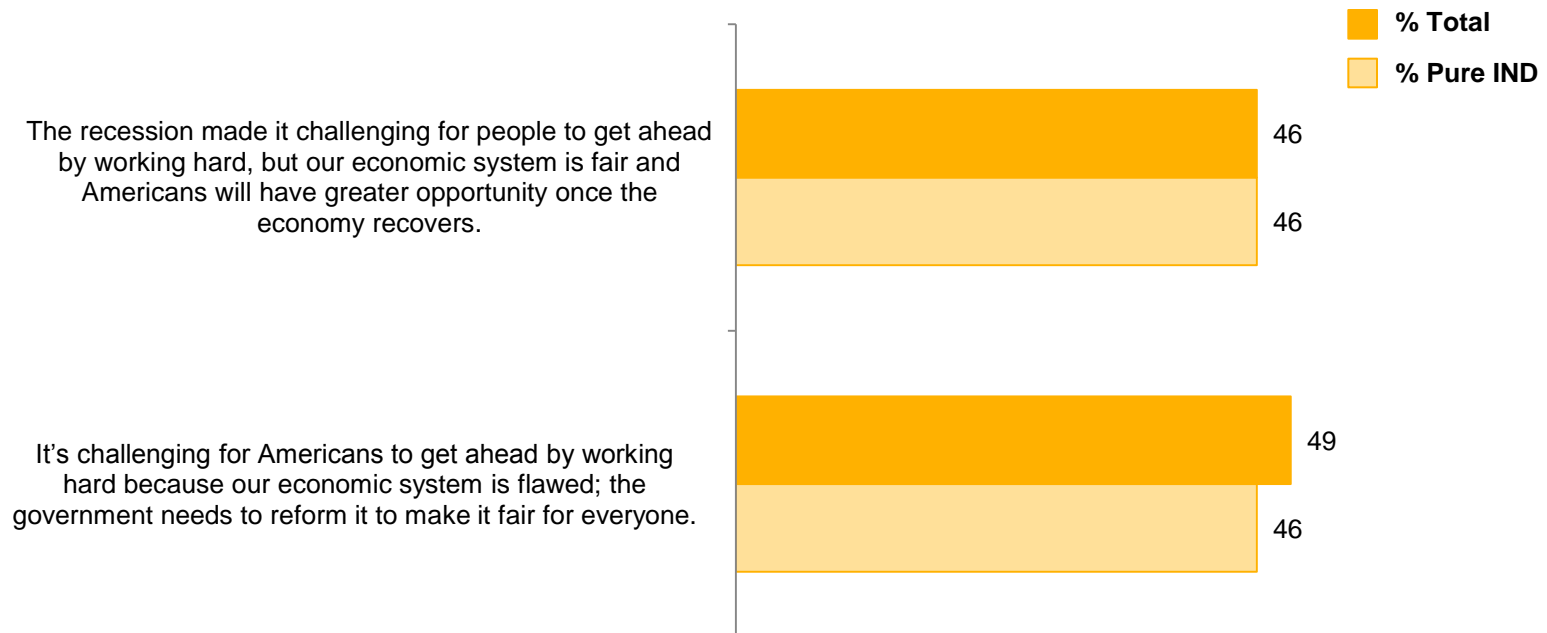
Greater Positive Impact on Economic Recovery



Views divide on the fairness of the economic system

Now I'd like to read two statements about the American economic system. Please tell me which you agree with more: [ROTATE]

Fairness of Economic System



The importance of actions for economic recovery differs across party lines

Now I'm going to read a list of actions that might help the U.S. economy recover from the recession. After I read each one, please tell me whether you think the action is extremely important, very important, somewhat important, or not too important for helping the U.S. economy recover from the recession. [RANDOMIZE & SPLIT]

Actions for Economic Recovery (n=400, m.o.e +/- 4.9%)	% Extremely/Very Important			
	Total	All IND	DEM	REP
Making it easier for small businesses to start and expand their operations.	84	81	83	91
Shifting outsourced jobs and operations from foreign countries back to the U.S.	81	83	80	79
Eliminating loopholes in the tax code that allow some corporations to pay little to no taxes.	78	83	85	63
Paying down the national debt and reducing the amount of debt taken on.	77	79	65	94
Providing tax incentives to revitalize the American manufacturing sector.	55	56	50	61
Increasing government spending for advanced education and job training for American workers.	50	50	72	26
Reducing regulations and taxes on American businesses.	49	45	34	69
Encouraging individuals to invest in businesses by maintaining the current dividend tax rate instead of raising it.	49	48	39	74
Maintaining the current income tax rates instead of raising taxes on families earning more than \$250,000.	49	43	41	69
Limiting taxes on individuals.	49	47	46	57
Reducing the corporate tax rate to make American businesses more competitive.	48	41	38	63
Increasing the profitability of American businesses to return value to shareholders.	46	36	43	54
Implementing policies that narrow the income gap between the rich and the poor.	45	46	64	23
Increasing government spending to create jobs in high-tech industries like energy and biotechnology.	38	33	60	21

Section 4 Corporate Responsibility



Food and Beverage companies are most favored; Financial, Oil, and Tobacco companies are the least

Next, I'm going to give you the names of several companies that you may know about. As I read the names, please tell me whether you have a favorable or unfavorable impression of the company. If you're not aware of the company, or have no impression of it, just let me know. [IF FAVORABLE/UNFAVORABLE, ASK:] And is your impression strongly [favorable/unfavorable] or just somewhat [favorable/unfavorable]?

Impression of Companies	% Fav.	% Unfav.	Total			All IND	DEM	REP
			% Str. Fav.	% Str. Unfav.	% Unaware/ No Imp.			
• Kraft Foods	79	6	38	2	14	78	75	86
• Coca-Cola	78	11	38	5	10	77	74	84
• Pepsi	76	11	36	4	12	73	73	82
• Proctor & Gamble	72	10	31	4	18	70	69	81
• Anheuser-Busch	60	20	21	10	19	58	57	62
• Pfizer	47	18	15	7	33	43	39	58
• Exxon Mobil	42	45	13	27	12	41	35	54
• Bank of America	37	51	11	30	11	33	37	40
• RJ Reynolds	34	26	10	15	39	35	30	42
• Philip Morris USA	28	46	8	28	24	28	25	33
• Altria Group	5	4	2	2	86	6	5	4



Respondents are more likely to view actions central to core business operations as important for social responsibility

Finally, I'm going to read a list of actions some people say large companies should take to be socially responsible. Please tell me whether you think it is extremely important, very important, somewhat important, or not at all important for large companies to do each of the following in order to be socially responsible. [RANDOMIZE Q35-41, SPLIT Q35-40]

Actions for Social Responsibility (Split Sample m.o.e +/- 4.9%)	% Extremely/Very Important			
	Total	All IND	DEM	REP
• Treat all employees and job applicants fairly.	94	96	96	91
• Provide high quality products and services.	91	89	91	92
• Communicate openly and honestly about their products, services and business practices.	90	91	93	89
• Minimize the potential harm associated with their products and services.	85	88	84	80
• Invest in developing their employees.	81	77	90	72
• Contribute to the economic stability of the communities in which they operate.	76	76	83	67
• Minimize the environmental impact of their products, services and operations.	74	77	82	62
• Market and advertise their products and services responsibly.	74	69	80	72
• Ensure that suppliers and other business partners act in a socially and environmentally responsible manner.	72	72	82	63
• Support charities and community projects.	66	63	73	61
• Demonstrate strong financial performance.	61	51	60	72
• Help solve social problems that concern the products and services they sell.	54	58	63	42
• Support government policies and legislation that reasonably regulate their industry.	51	48	68	36



