

UNDERSTANDING INDEPENDENT VOTERS



> SURVEY OVERVIEW

- > The following presentation is commissioned by and prepared for Altria Client Services and contains data from two waves of surveys conducted by Strategy 360 on the political landscape and independent voters.
- > In Wave I (October 19-22, 2009), 800 registered voters along with an oversample of self-identified independents to reach 801 independent voters were surveyed. The margin of error for the registered voter survey (N=800) is +/- 3.5%, and a margin of error for independents with the oversample (N=801) is +/- 3.5%.
- > In Wave II (January 28 – February 4, 2010), 801 registered voters along with an oversample survey of self-identified independents to reach 685 independent voters were surveyed. The margin of error for the registered voter survey (N=801) is +/-3.5%, and margin of error for independents with the oversample survey (N=685) is +/-3.7%.
- > Respondents for both of these surveys were reached by telephone and chosen randomly from a targeted sample.

> AGENDA



Independent voter snapshot



Political landscape



Salient issues



Role and responsibilities of the government



Taxes and spending



Conclusion

Independent “leaners” behave and believe more like their respective partisans than pure independents.

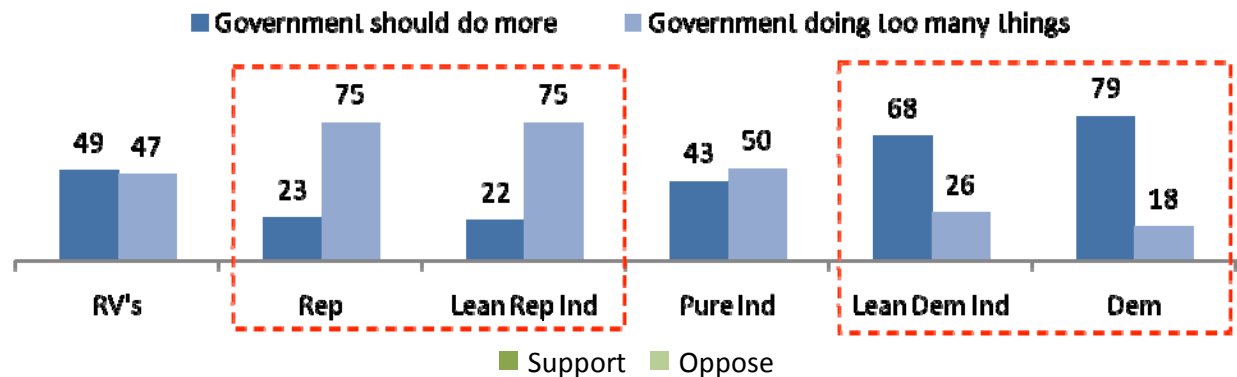
- Much like Wave I, differences in the attitudes of Republican- and Democrat-leaning independents, as well as pure independents are demonstrated throughout this data.

- Attitudinal alignment between Republicans and Republican-leaning independents is slightly stronger on key measures, compared to their Democrat counterparts.

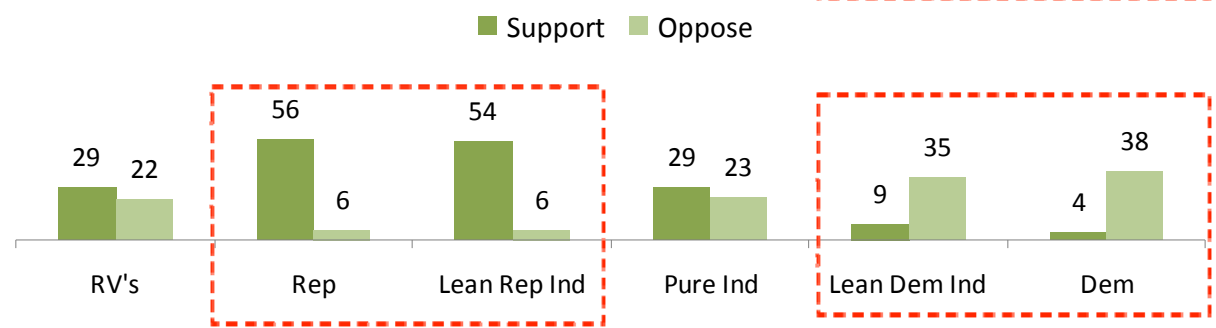
- Because the leaners’ more polarized views cancel each other out, pure independents look more like independents overall.

INDEPENDENT COMPARISON ON KEY MEASURES

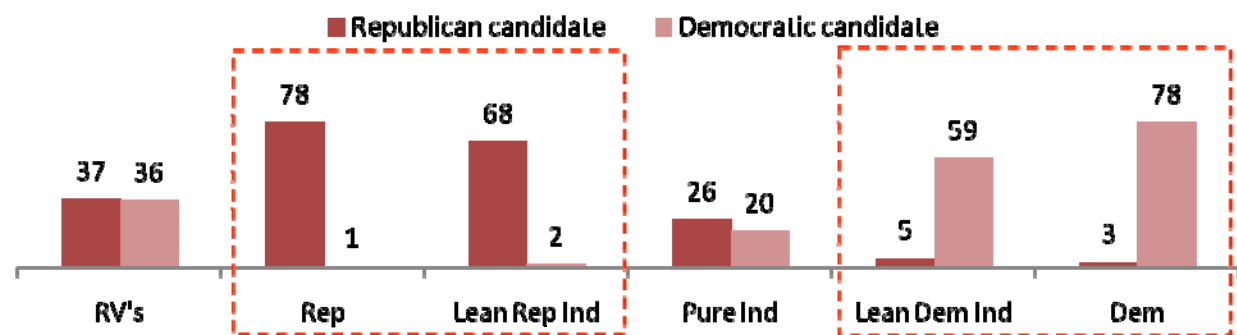
ROLE OF GOVERNMENT



TEA PARTY SUPPORT



GENERIC BALLOT



> AGENDA

- > Independent voter snapshot
- > **Political landscape**
- > Salient issues
- > Role and responsibilities of the government
- > Taxes and spending
- > Conclusion

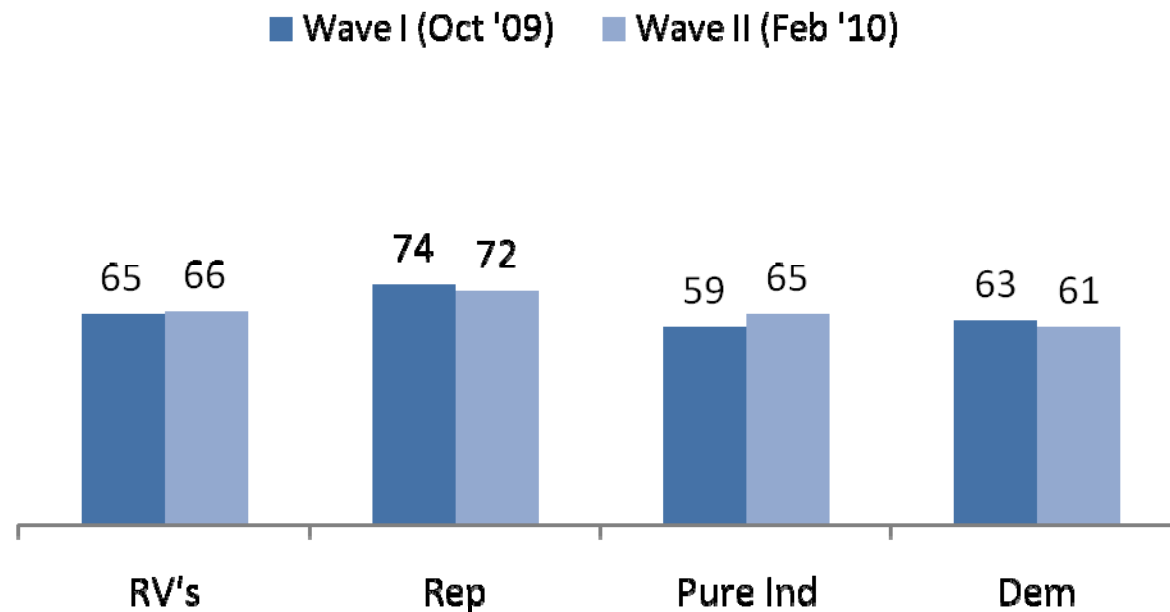
Voting intensity has increased among pure independents since October.

LIKELIHOOD TO VOTE

As you know, there will be an election for U.S. Congress in November two thousand ten. 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?

- Compared to RVs, whose overall responses remained relatively static on this measure, movement among pure independents (+6) suggests an increasingly charged independent voting bloc.

Respondents who are "extremely likely" to vote

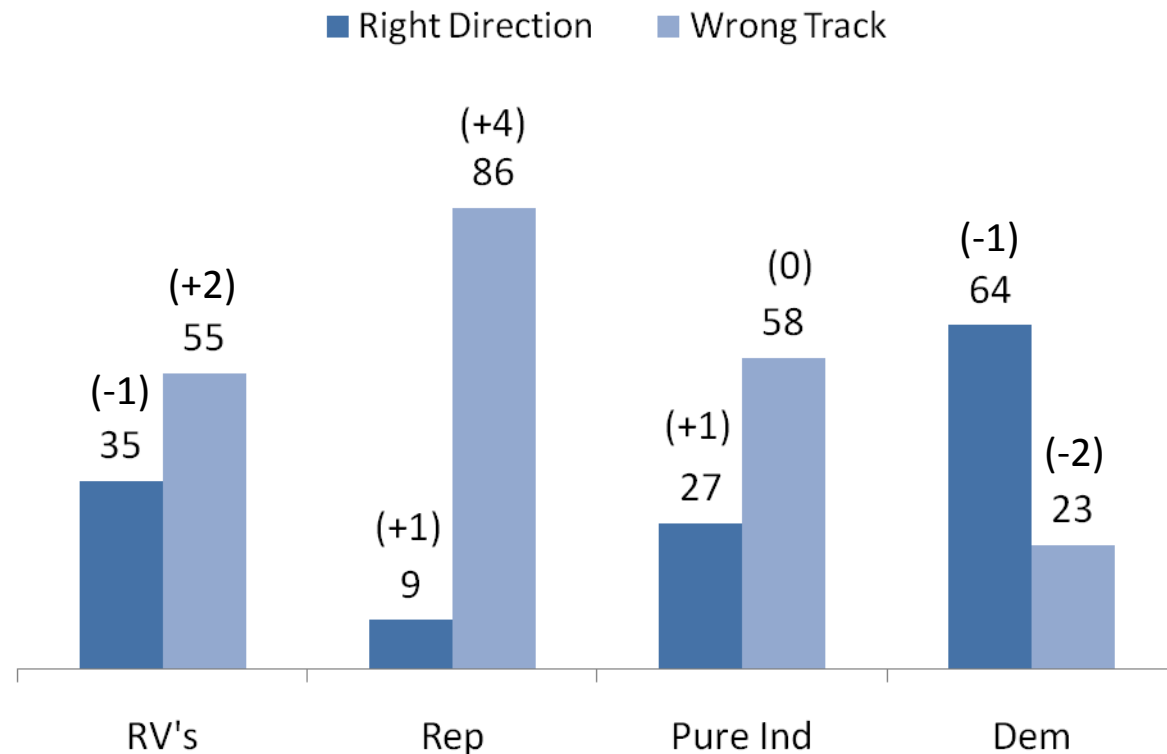


A majority of pure independents agree with Republicans that the country is heading in the wrong direction.

DIRECTION OF COUNTRY

Would you say things in this country are heading in the right direction or off in the wrong direction?

- On this measure, like many others throughout this study, pure independents' views align more closely with those of Republicans than Democrats – a clear shift from 2006 and 2008.



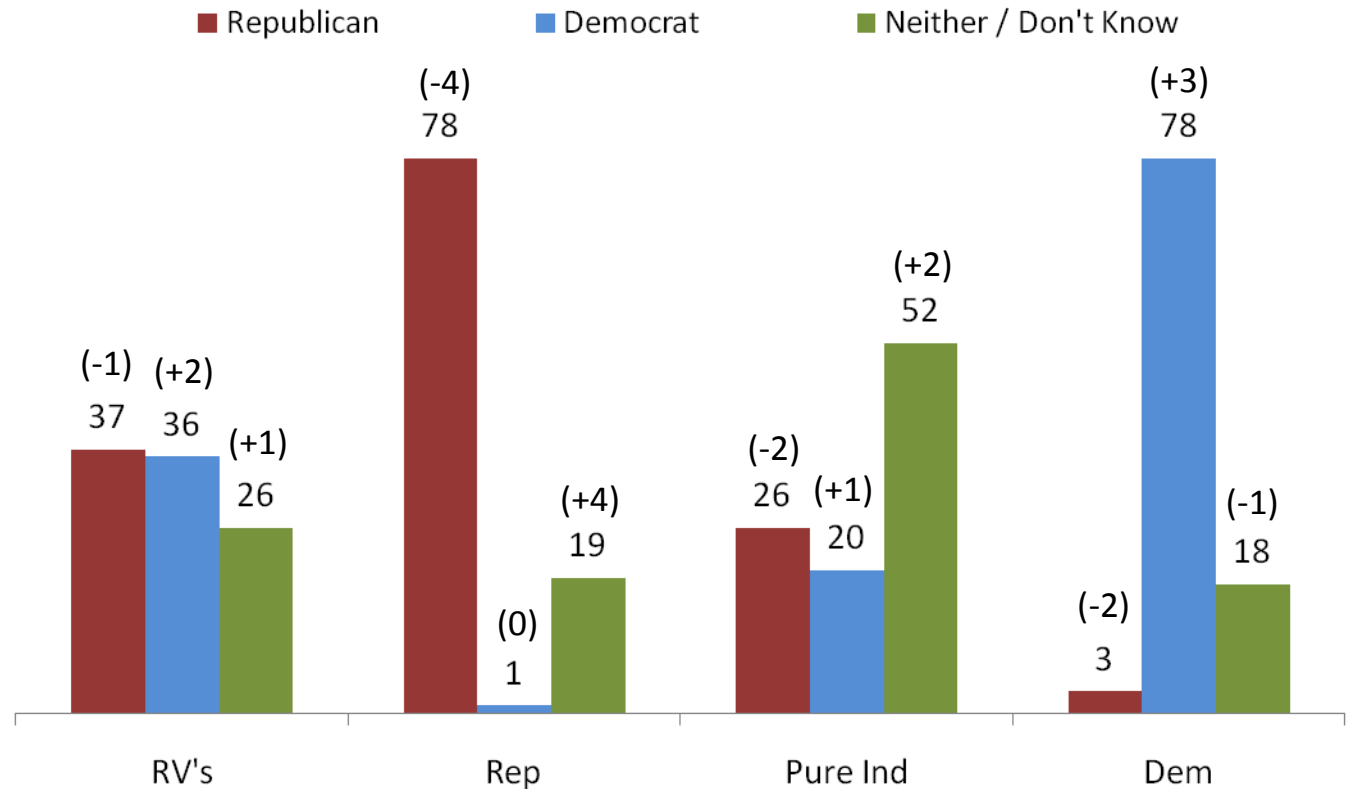
NOTE: Number in parenthesis signifies change from Wave I

The generic Republican and Democrat candidates hold equal amounts of support from their respective bases.

GENERIC BALLOT

If the election were being held today, would you vote for the Republican candidate or Democratic candidate in your district?

- Since Wave I there has been a slight softening of support for the generic Republican among its base, but no significant changes otherwise.



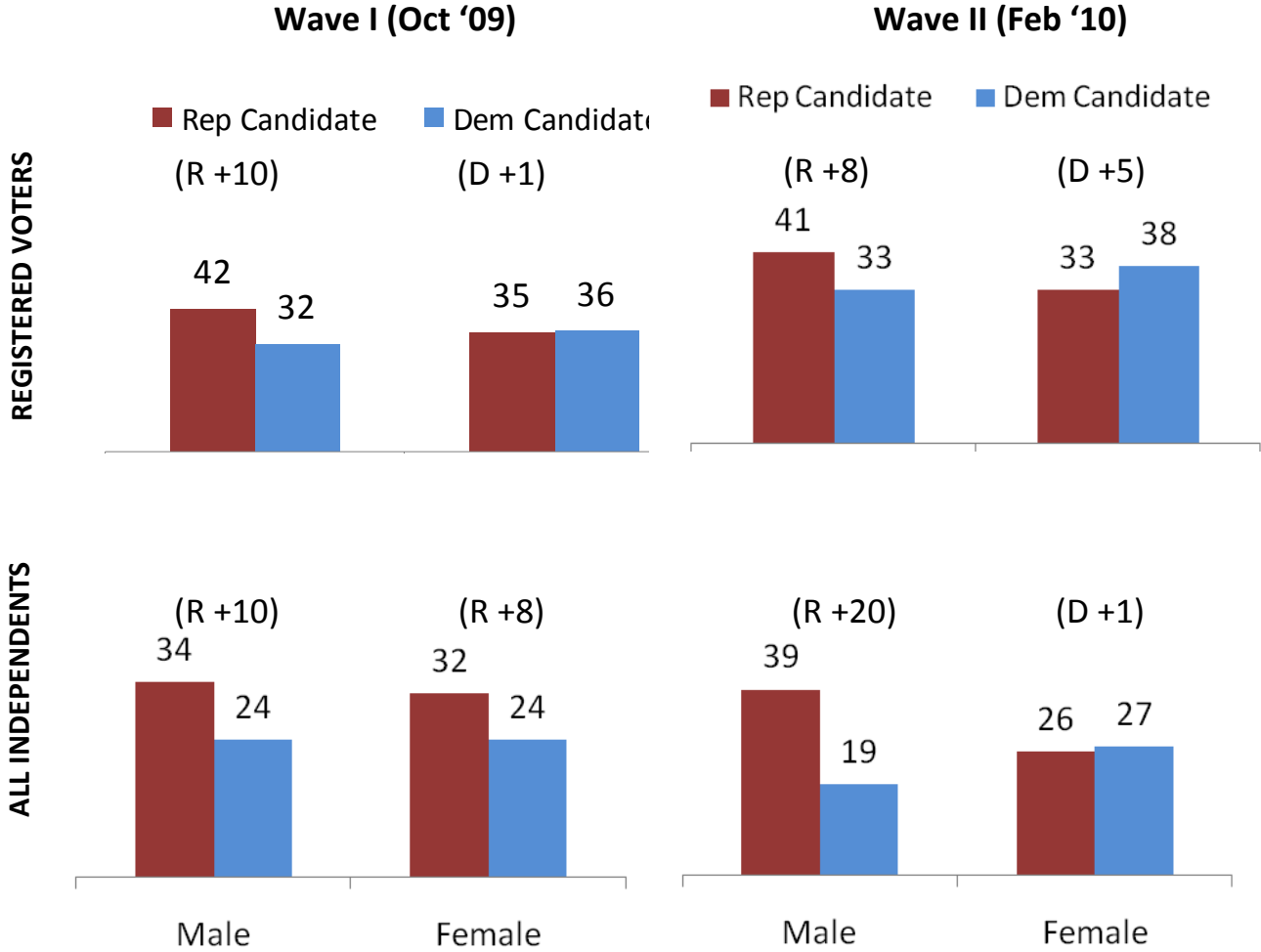
NOTE: Number in parenthesis signifies change from Wave I.

The gender gap has widened among RVs and especially among independents overall.

GENERIC BALLOT – GENDER

If the election for Congress were being held today, would you vote for the Republican candidate or Democratic candidate in your district?

- Among RV women, the margin for the generic Democrat has increased slightly since October, whereas the generic Republican has maintained its support among RV men.
- Greater volatility, however, is demonstrated among independents overall: Among independent men, the generic Republican’s advantage has doubled to 20-points. Among independent women, however, the 8-point generic Republican lead has been overtaken, albeit by 1-point, for the generic Democrat.



Generic party allegiance is higher among former Republicans than former Democrats.

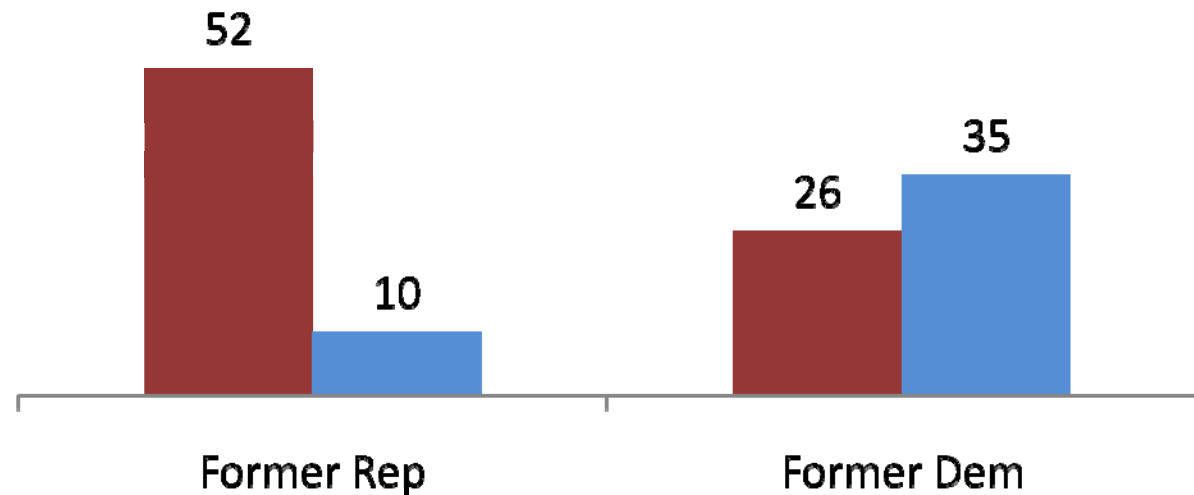
GENERIC BALLOT – FORMER PARTISANS

If the election for Congress were being held today, would you vote for the Republican candidate or Democratic candidate in your district?

- This trend continues from Wave I, where pure independents who previously identified as Republicans behave more like Republicans than their formerly Democrat counterparts.

Pure Independents ONLY

■ Rep Candidate ■ Dem Candidate

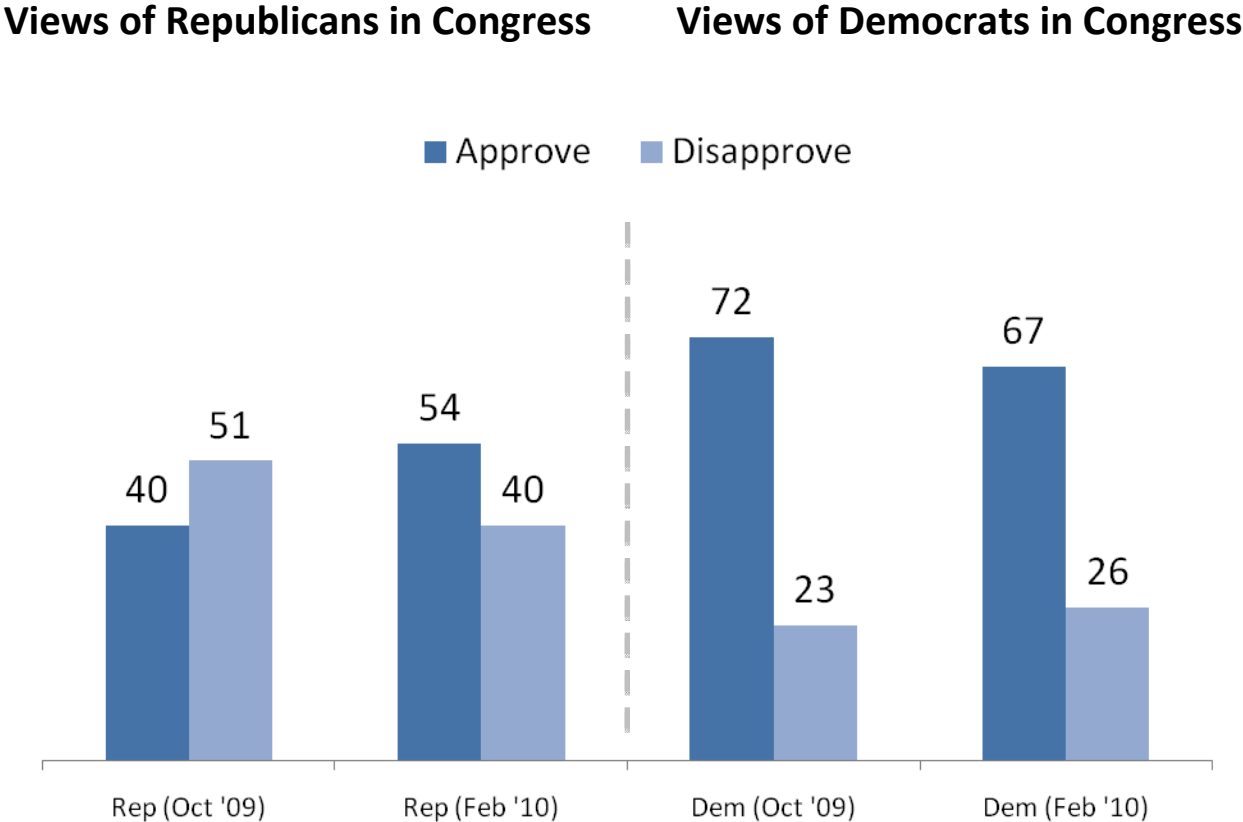


Republicans in Congress are winning back the approval of their party identifiers.

JOB APPROVAL OF CONGRESSIONAL GOP/DEM

Do you approve or disapprove of Democrats / Republicans in Congress?

- While Republican approval of Republicans in Congress is still lower compared to Democrat approval of Democrats in Congress, the 11-point net disapproval rating from October has flipped to a 14-point net approval rating.
- Conversely, the Congressional Democrats have lost some ground among self-identified Democrats, as the net approval rating has dropped 8-points since October.



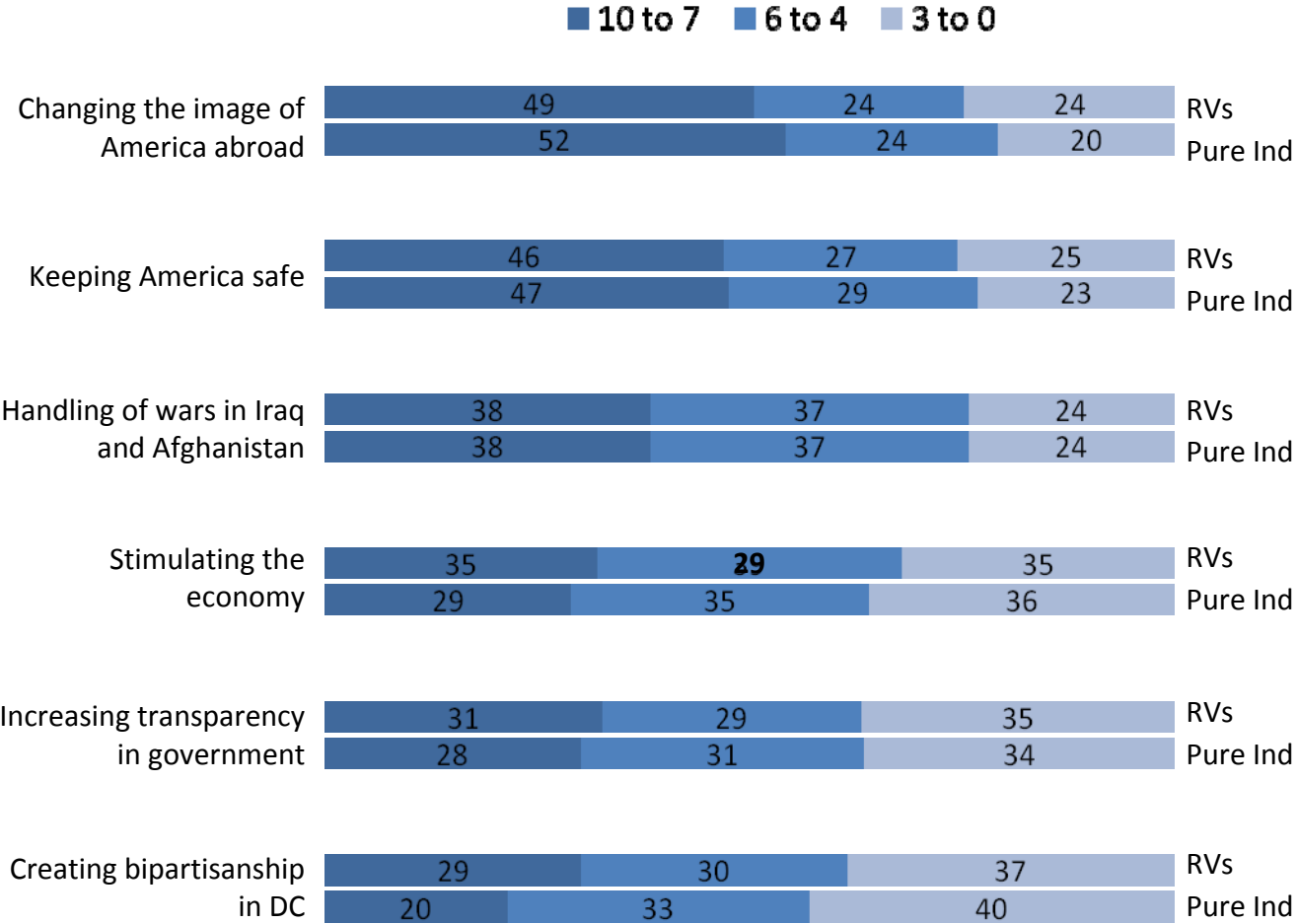
President Obama receives the highest marks for his efforts on foreign issues, but falls short on the domestic side.

OBAMA'S PERFORMANCE

Please rate President Obama's efforts on that issue on a scale of zero to ten, with zero meaning his efforts have been a failure and ten meaning his efforts have been a success.

- An interesting foreign/domestic divide emerges on this measure, with Obama's efforts abroad winning the highest marks from both RVs and pure independents. Internally focused domestic issues, such as stimulating the economy and increasing transparency and bipartisanship earn him the lowest marks.

- The attitudes of RVs and pure independents track similarly across externally focused issues, but diverge on the internal, most notably "stimulating the economy" (6-point gap between RVs and pure independents) and "creating bipartisanship in D.C." (9-point gap).



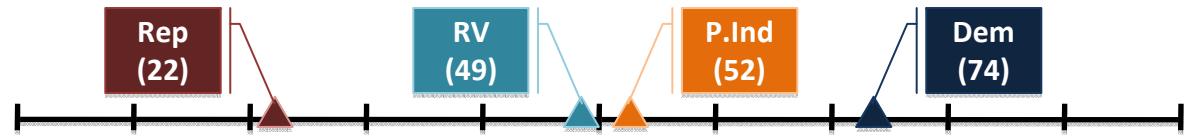
Pure independents agree more with Republicans on Obama's handling of domestic issues, and with Democrats on his foreign efforts.

- Pure independents are tracking more closely with Republicans on domestic issues, particularly creating bipartisanship in Washington.
- On Obama's handling of external issues, pure independents align more closely with Democrats.
- Interestingly, the alignment on the Republican side is slightly closer than that of pure independents' alignment with Democrats.

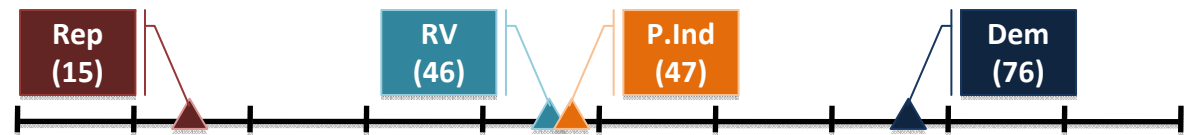
OBAMA'S PERFORMANCE – PARTY I.D.

Respondents who rated Obama's performance 7-10

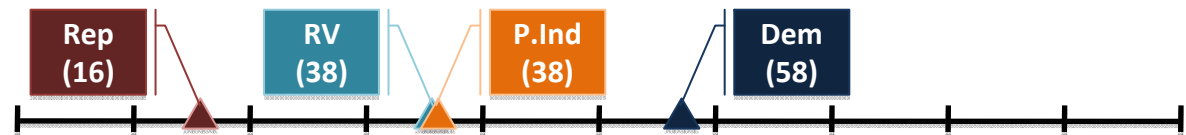
1. Changing Image of America



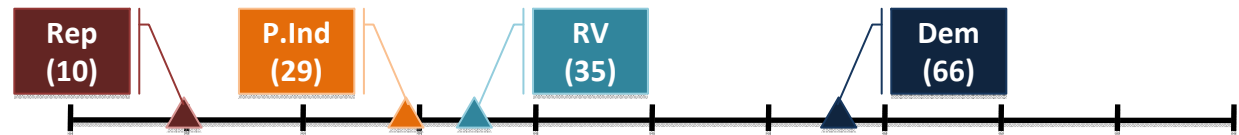
2. Keeping America Safe



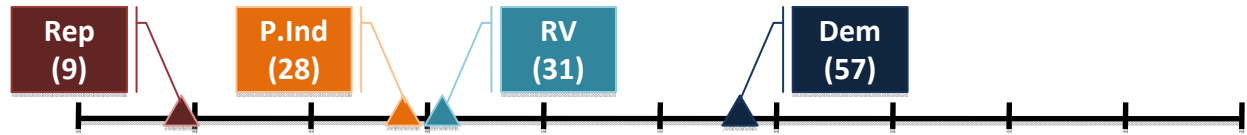
3. Handling of Wars in Iraq and Afghanistan



4. Stimulating the Economy



5. Increasing Transparency in Government



6. Creating Bipartisanship in Washington



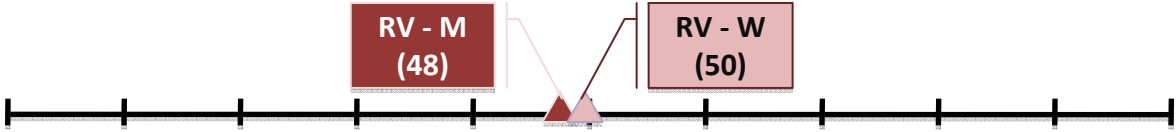
0 10 20 30 40 50 60 70 80 90 100

The most pronounced gender gap emerges on Obama's efforts to create bipartisanship in Washington.

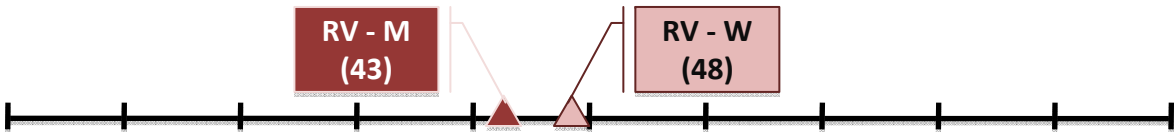
OBAMA'S PERFORMANCE – GENDER

Respondents who rated Obama's performance 7-10

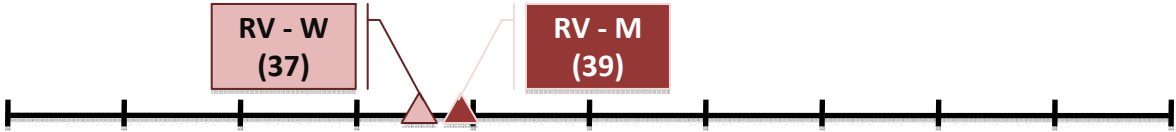
1. Changing Image of America



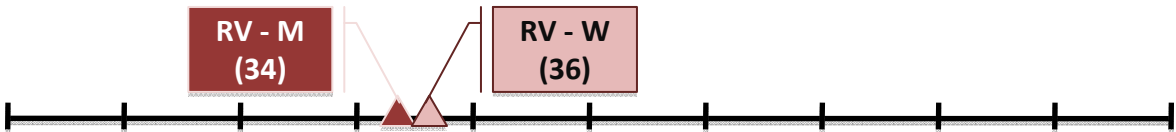
2. Keeping America Safe



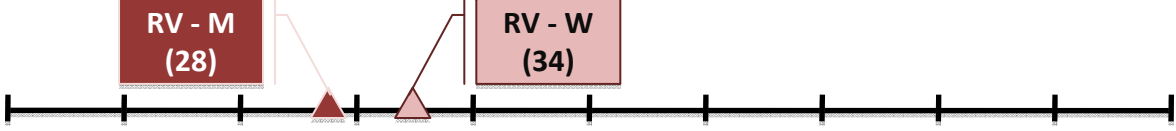
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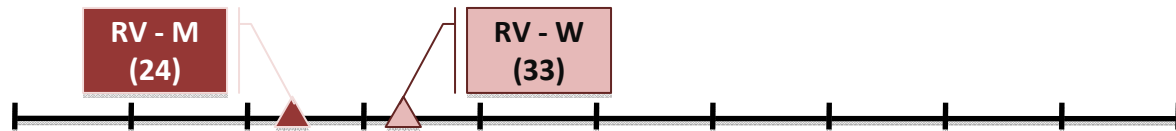
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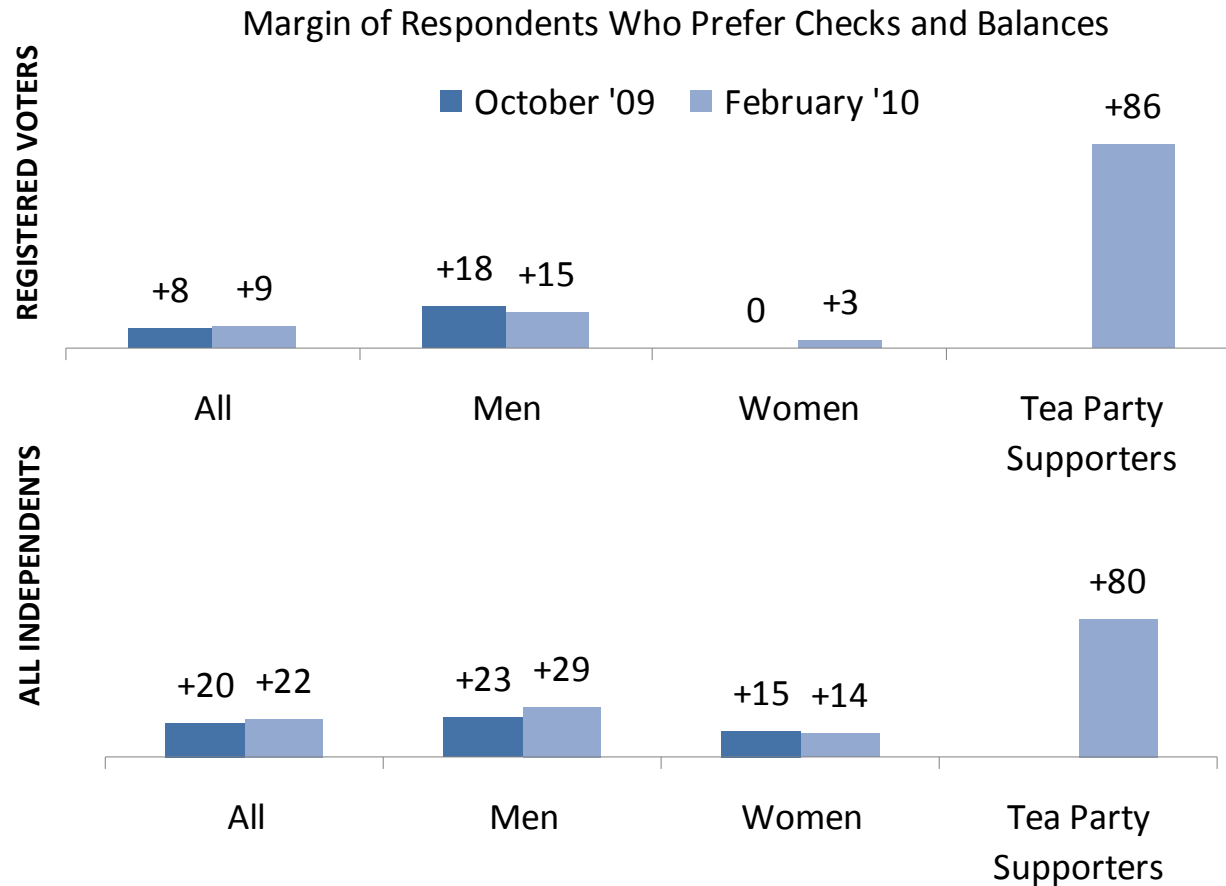
0 10 20 30 40 50 60 70 80 90 100

A checks and balances argument still wins by a greater margin among independents than among RVs.

CHECKS AND BALANCES

...who would you prefer... a Republican congressman and senator who will be a check and balance to Barack Obama and Democrats in Congress OR a Democrat congressman and senator who will help Barack Obama and Democrats in Congress pass their agenda?

- The idea of a check and balance to Obama and Democrats in Congress has significant appeal to the electorate overall.
- In particular, this argument is gaining ground with independent men.

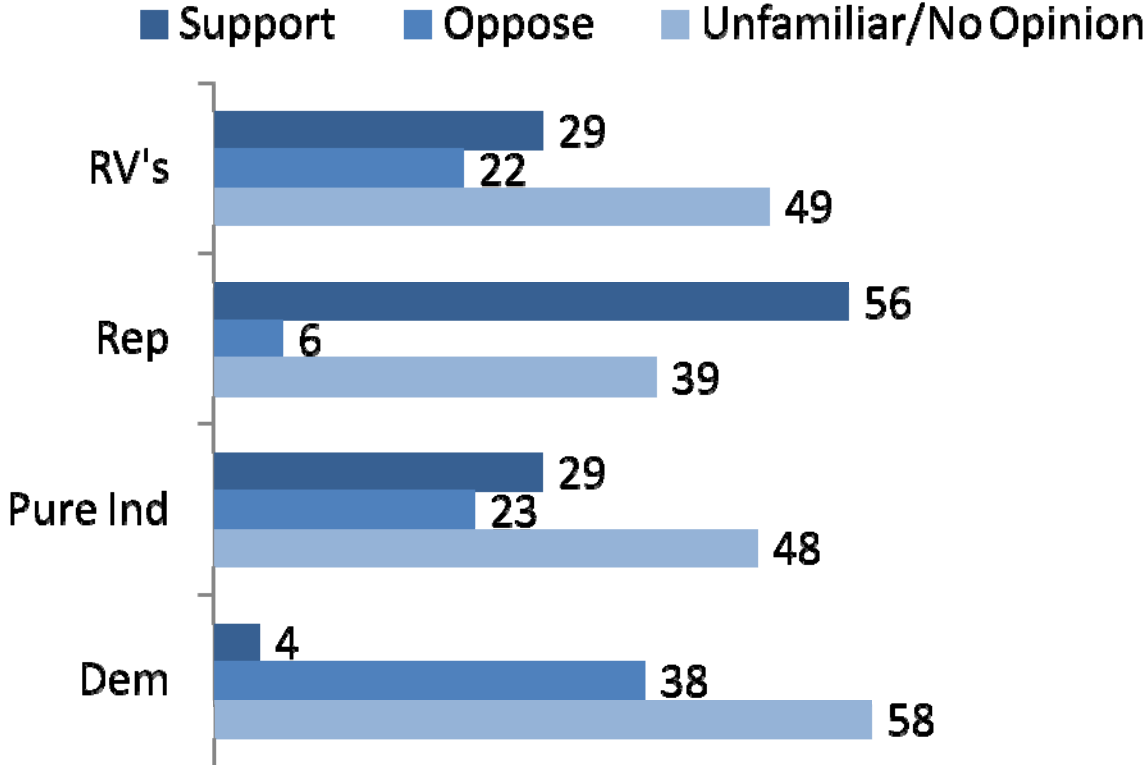


While supported by a majority of Republicans, the Tea Party movement remains relatively undefined overall.

TEA PARTY MOVEMENT

Do you support or oppose the Tea Party movement?

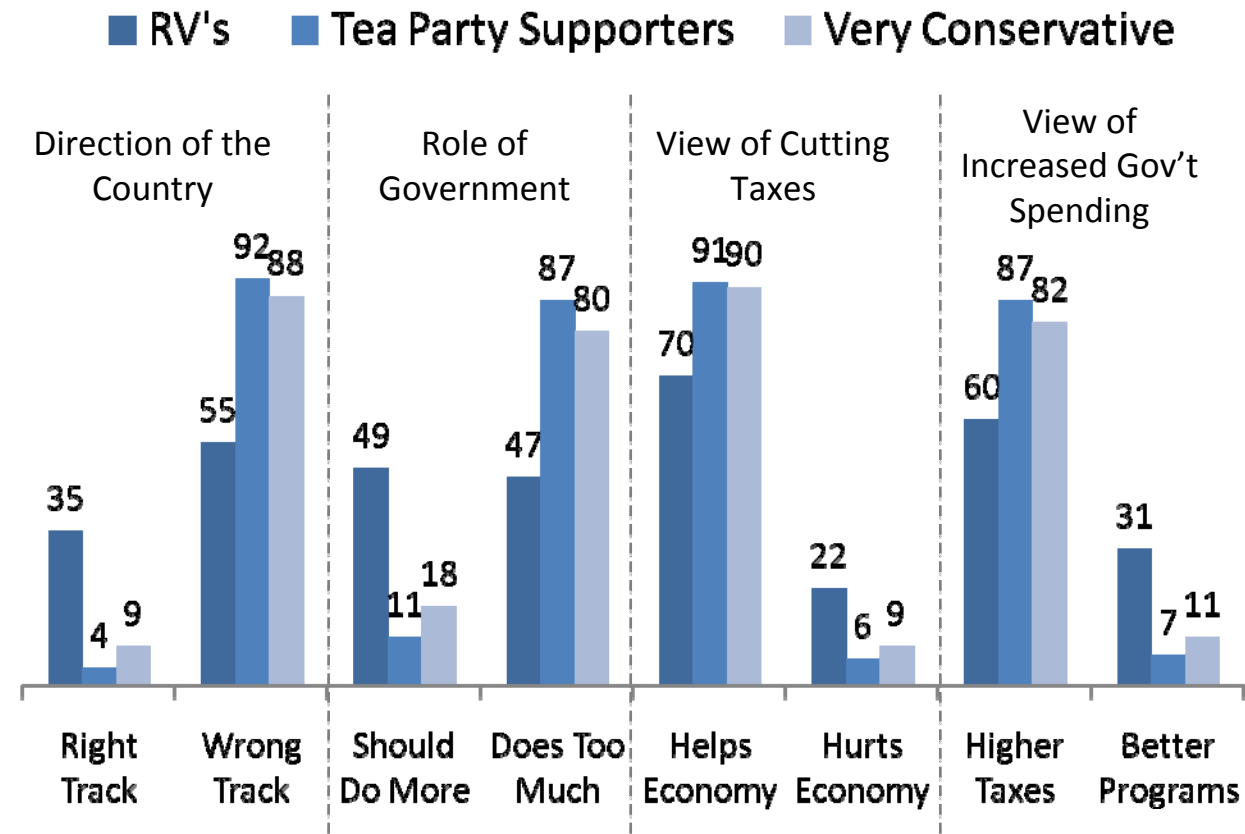
- Tea Party supporters (n=232)
- Republicans and Republican-leaning independents are driving support for this movement by a 50- and 48-point margin respectively.
- Opposition outweighs support among Democrats and Democrat-leaning independents by 34- and 26-points.
- Roughly half of RVs, pure independents and Democrats have no familiarity with or opinion of the Tea Party movement.



Tea Party supporters align with the most conservative of respondents across a range of measures.

TEA PARTY SUPPORTERS

- Voters who support the Tea Party believe the country is headed in the wrong direction, the government has grown too large, spends too much, etc...by a greater margin than even the most conservative of RVs.
- Tea party supporters also overwhelmingly back the Republican on the generic Congressional ballot, but this stems more from disapproval of Democrats than from approval of Republicans in Congress (48% disapprove and 46% approve of Republicans in Congress; 92% disapprove and 5% approve of Democrats in Congress).

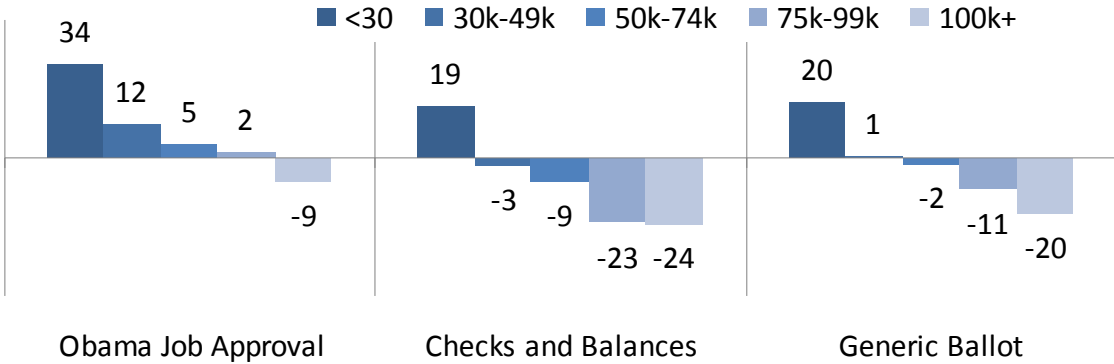


Democrats receive the most support from individuals making less than 30K per year.

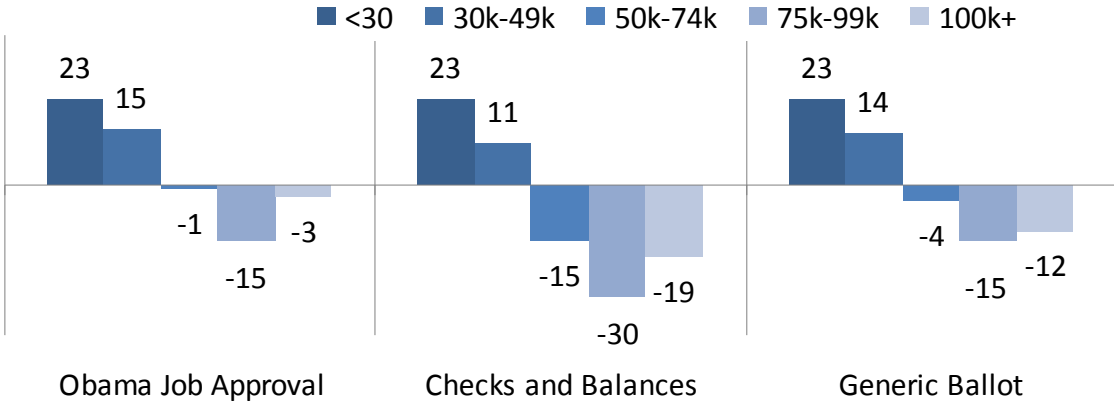
DEM SUPPORT BY INCOME BRACKET

- Similar to findings from Wave I, Democratic margins are greatest among the lowest income group.
- Additionally, support from the 30-49K income bracket has increased since Wave I.

Democratic Margins (Wave I)



Democratic Margins (Wave II)

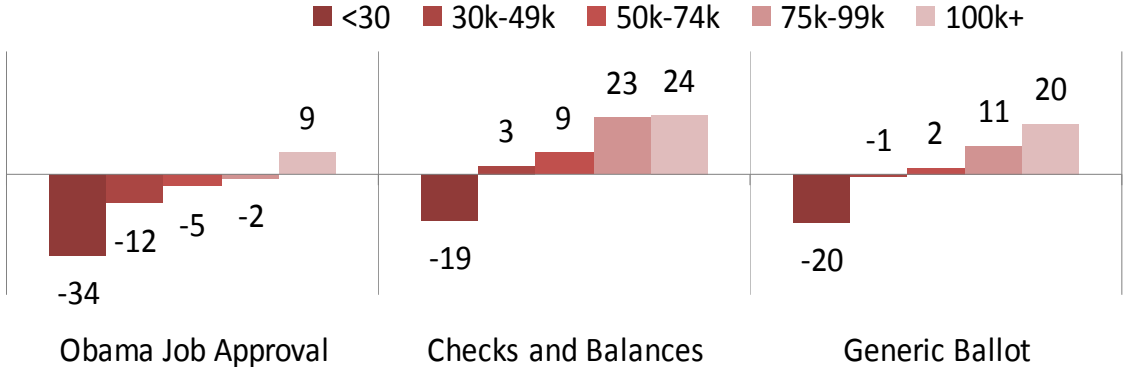


Republicans are gaining support from the middle class across a range of measures.

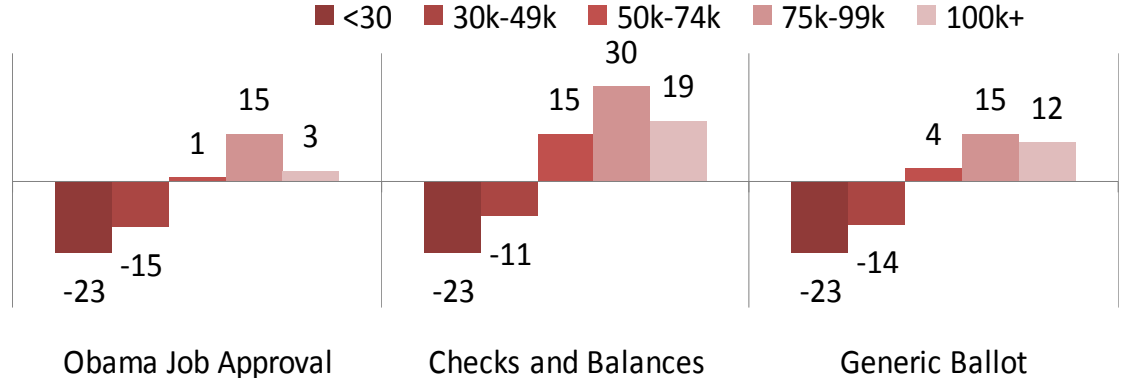
REPUBLICAN SUPPORT BY INCOME BRACKET

- By income bracket, Republicans receive the greatest margin of support from individuals making \$75-99k per year. This is a significant departure from Wave I, where individuals in the highest income bracket accounted for the most Republican support.

Republican Margins (Wave I)



Republican Margins (Wave II)



> AGENDA



Independent voter snapshot



Political landscape



Salient issues



Role and responsibilities of the government



Taxes and spending



Conclusion

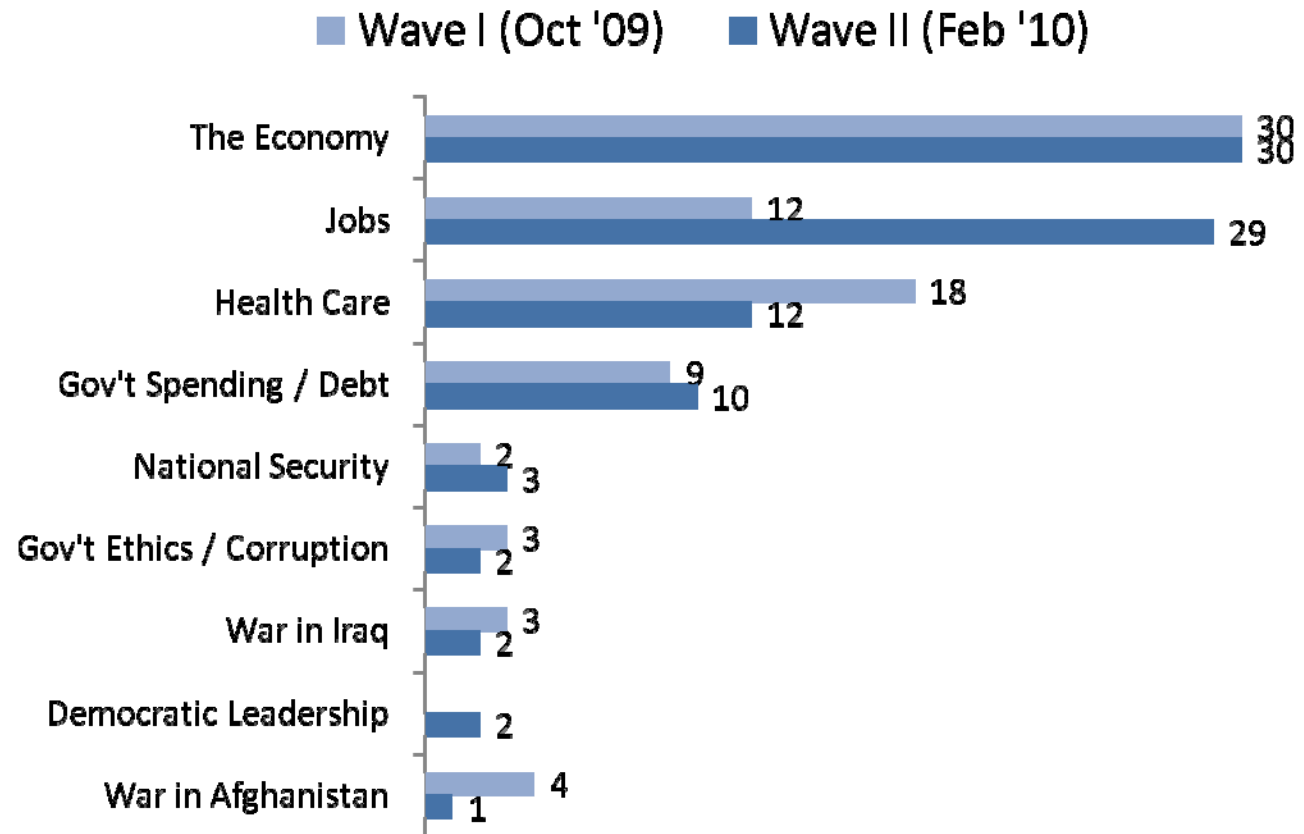
Since Wave I, concern about jobs has spiked among RVs, while health care has lost ground.

MOST IMPORTANT PROBLEM - RVs

Open-ended responses

What would you say is the single most important problem facing the nation?

- As in October, the top three responses to the open-ended question about the single most important problem facing the country are the economy, jobs, and health care.
- Concern over jobs has more than doubled since October, while there has been a significant decrease in the amount of RVs mentioning "health care" as the single most important issue.



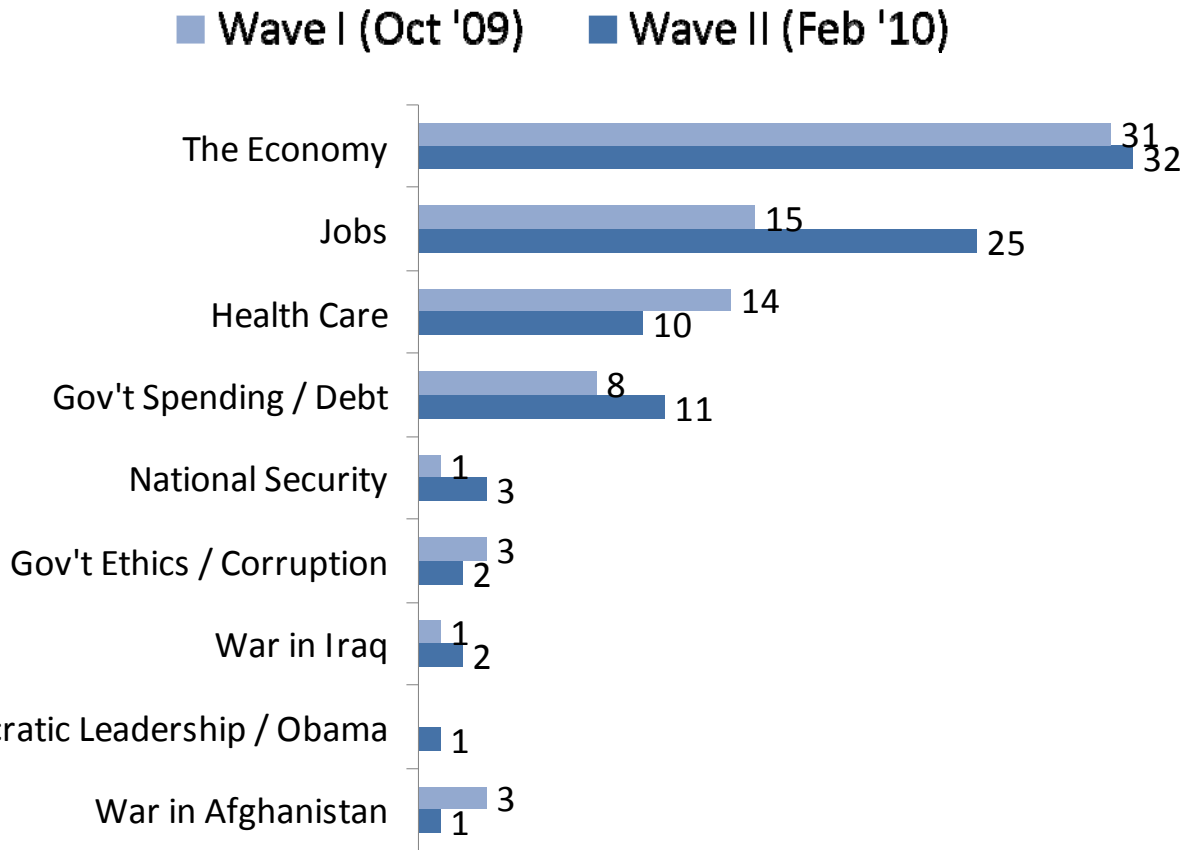
The concerns of pure independent voters mirror those of RVs, with job creation spiking and health care falling in importance.

MOST IMPORTANT PROBLEM – PURE IND

Open-ended responses

What would you say is the single most important problem facing the nation?

- Among pure independents, the health care focus seems to have shifted to an increased concern over jobs as well as government spending/debt – a slight departure from RVs overall, who shifted more to jobs.
- Partisan leaning independents are driving these shifts.

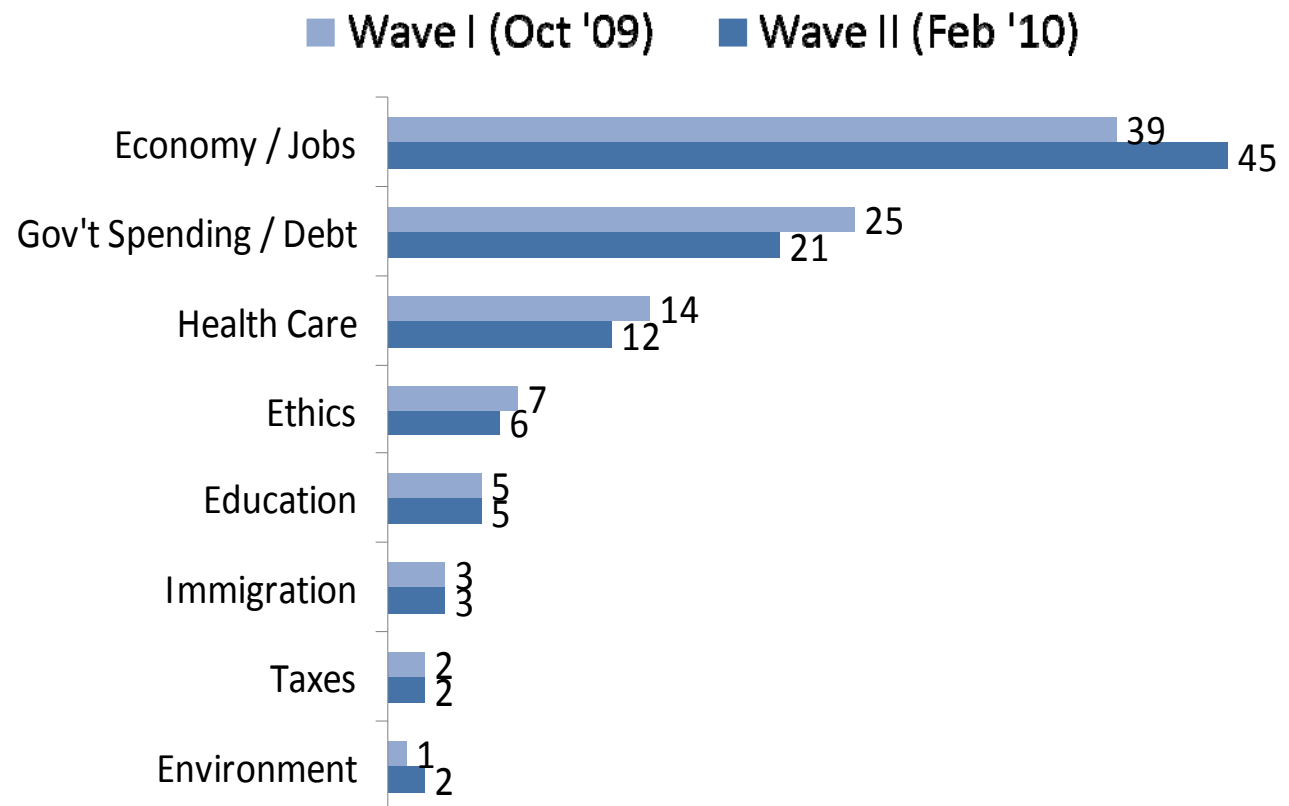


Concern about government spending and debt, as well as the economy and jobs spikes when respondents are prompted with these issues.

MOST IMPORTANT DOMESTIC ISSUE - RVs

Close-ended responses

Now I'd like to read to you a list of domestic issues and have you tell me which one you think is the most important domestic problem facing the nation.

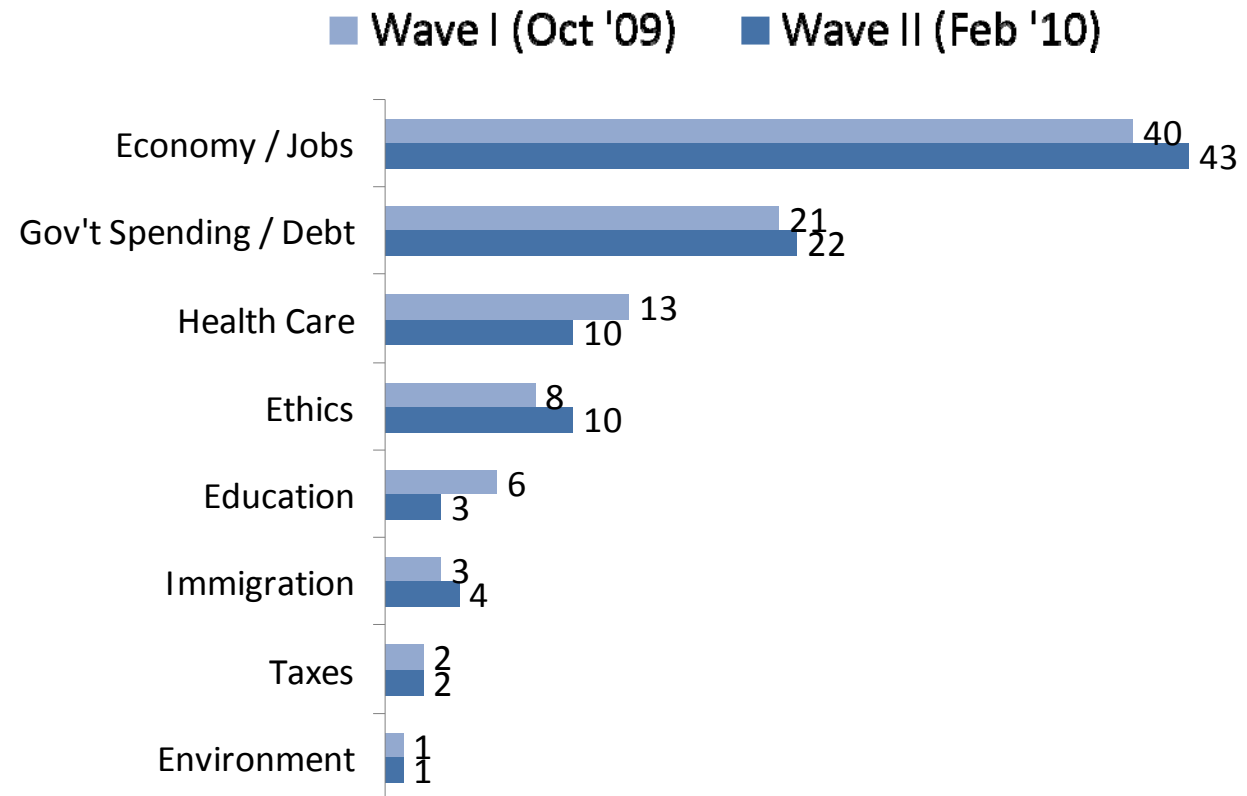


Pure independents follow RVs in terms of heightened concern over jobs and spending when they are presented with these issues.

MOST IMPORTANT DOMESTIC ISSUE – PURE IND

Close-ended responses

Now I'd like to read to you a list of domestic issues and have you tell me which one you think is the most important domestic problem facing the nation.



> AGENDA

> Independent voter snapshot

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> Salient issues

> **Role and responsibilities of the government**

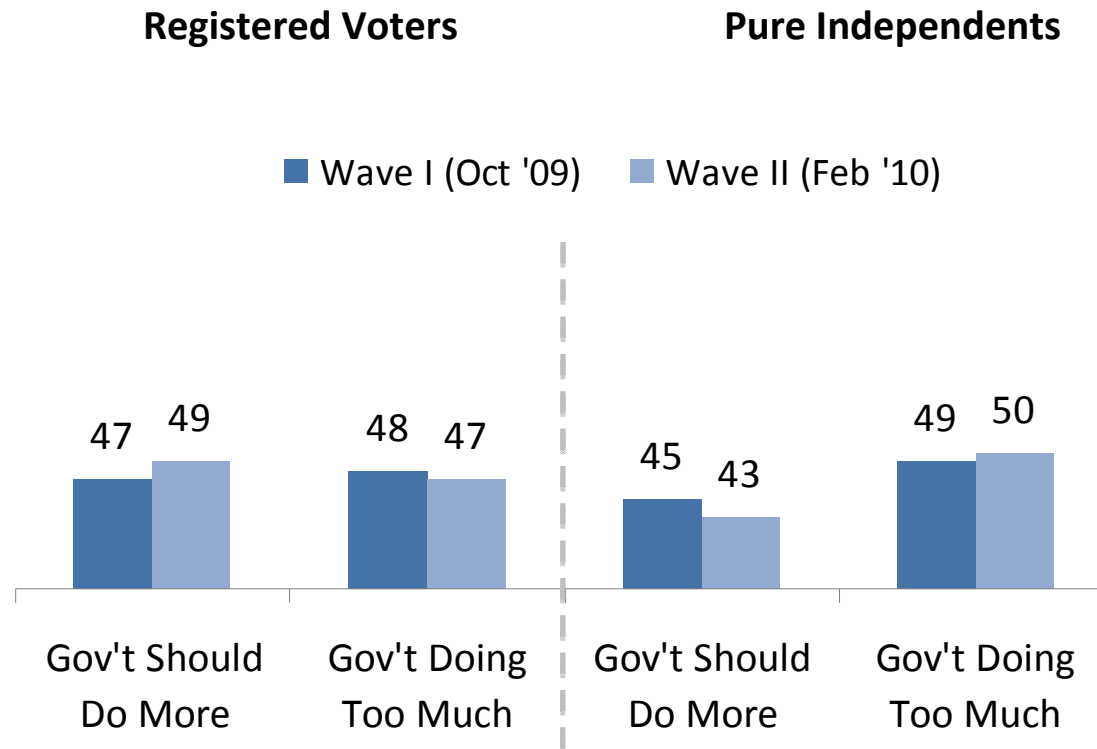
> Taxes and spending

> Conclusion

By an increasing margin, pure independents believe that the government is doing too many things better left to businesses and individuals.

ROLE OF GOVERNMENT

Which of these two statements about the role of government comes closer to your point of view: Government should do more to solve problems and meet the needs of people; OR Government is doing too many things better left to businesses and individuals?

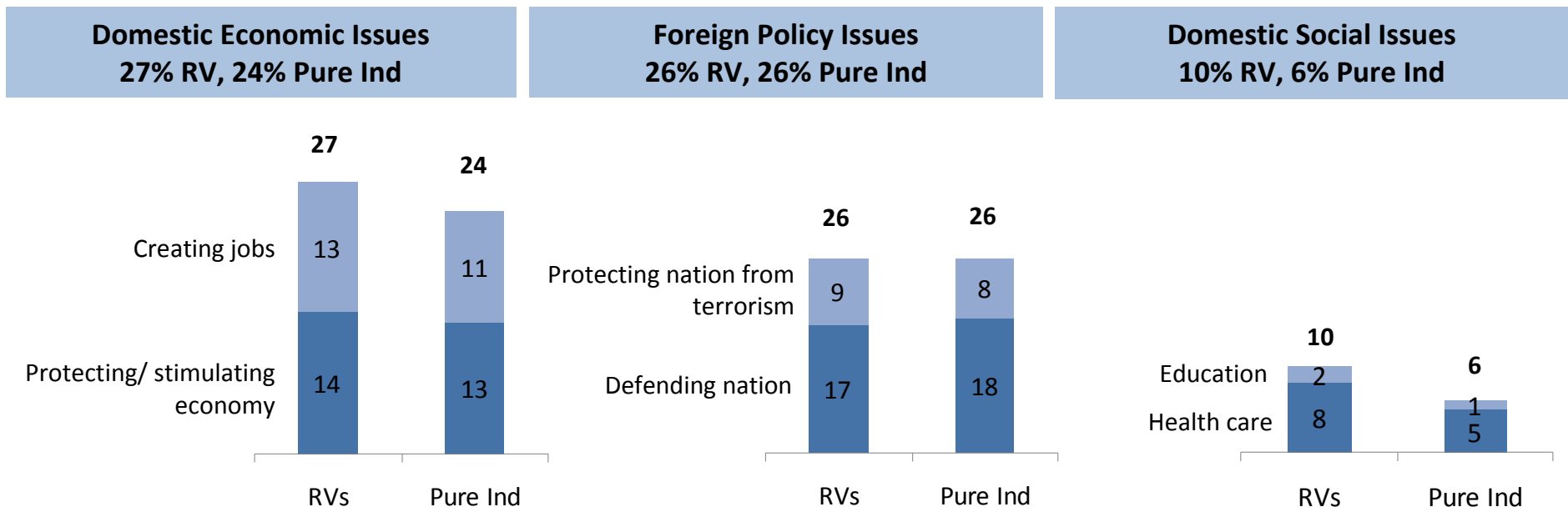


The most important responsibility of the federal government breaks down into three distinct categories.

FEDERAL RESPONSIBILITY

Open-ended responses

What do you think is the most important thing the federal government should be responsible for doing?



> AGENDA

- > Independent voter snapshot
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- > **Taxes and spending**
- > Conclusion

RVs and pure independents both recognize the nexus between lower taxes and economic growth.

• RVs and pure independents overall believe cutting taxes helps rather than hurts the economy. Further, voters believe increased government spending leads to “higher taxes and costs” as opposed to “better programs and solutions.”

• While “taxes” barely registers as voters’ most important issue on the open-ended or closed-ended versions, these responses suggest they recognize the nexus between lower taxes and economic growth, as well as that more government spending ultimately leads to higher taxes.

TAXES AND SPENDING

Figure 1: Which one of the following comes closer to your view: Cutting taxes helps the economy because people and businesses have more money to invest back into the economy; OR Cutting taxes hurts the economy by limiting the government’s ability to put programs and solutions into place?

Figure 2: Which one of the following comes closer to your view: Increased government spending ultimately leads to higher taxes and increased costs of goods and services OR Increased government spending leads to better programs and solutions that we all benefit from?

Figure 1. Economic Impact of Cutting Taxes

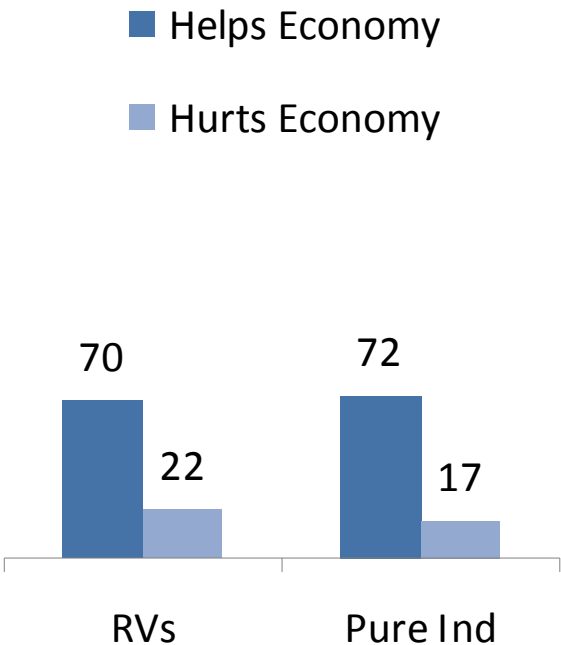
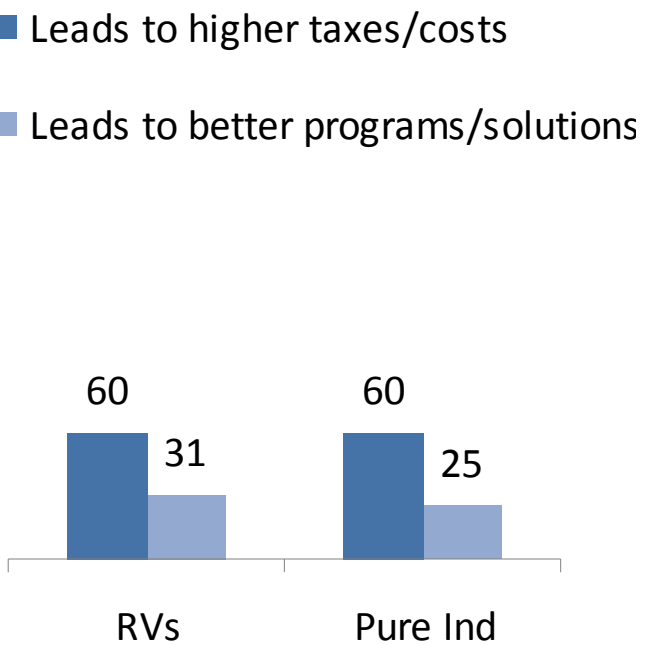


Figure 2. Implications of Government Spending



Messages on taxes and spending resonate among a varied group of respondents.

TAXES AND SPENDING – KEY DEMOGRAPHICS

Figure 1: Which one of the following comes closer to your view cutting taxes helps the economy because people and businesses have more money to invest back into the economy; OR Cutting taxes hurts the economy by limiting the government’s ability to put programs and solutions into place?

Figure 2: Which one of the following comes closer to your view: increased government spending ultimately leads to higher taxes and increased costs of goods and services OR Increased government spending leads to better programs and solutions that we all benefit from?

Figure 1. Cutting taxes helps economy

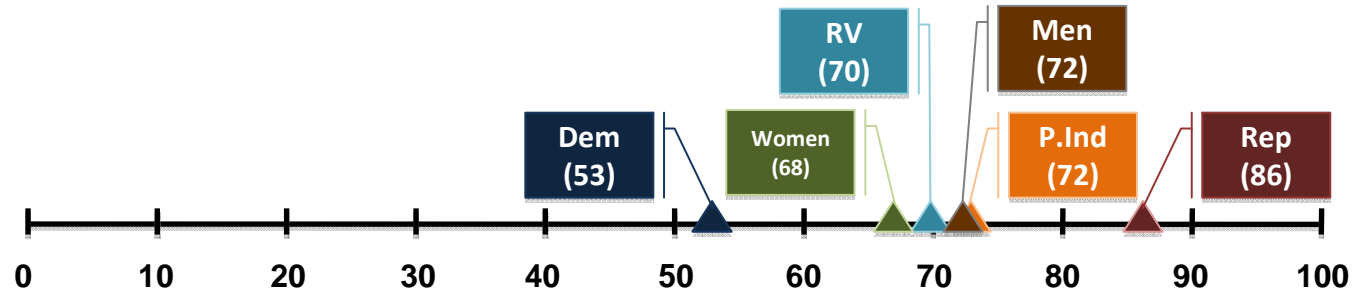
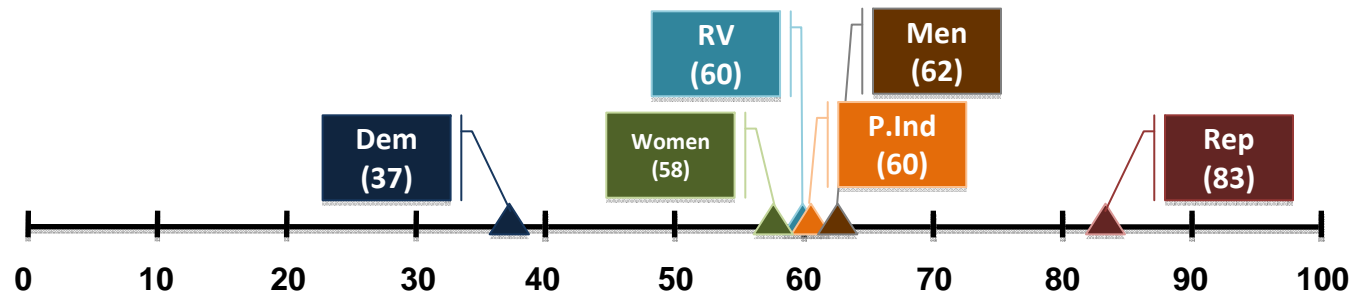


Figure 2. Increased government spending leads to higher taxes



› CONCLUSION

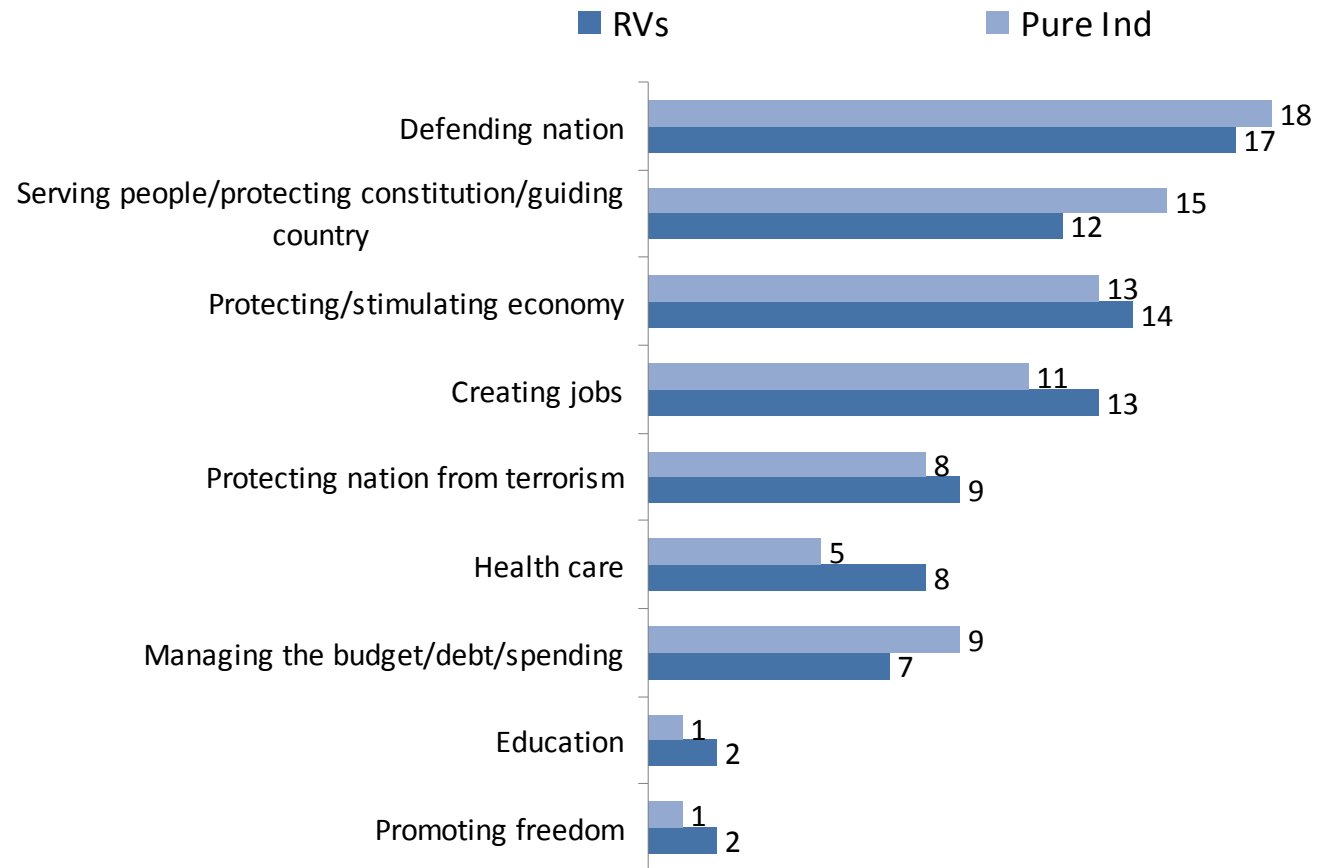
- › Historically, Democratic-leaning independents and Republican-leaning independents behave and believe more like their respective co-partisans than like “pure independents.” However, Wave II data show some exceptions to this trend, particularly among Democrat-leaning independents. While they still resemble Democrats more so than other groups, there has been a shift away from their partisan counterparts on key measures.
- › Pure independents still resemble Republicans slightly more so than Democrats, but are largely up for grabs.
- › Independent men have shifted slightly toward the Republican side, while independent women have moved more in the Democrat direction.
- › Concerns about jobs are rising, while concerns about health care are falling among both independent and RVs.
- › Responses on the taxes and spending measure reveal important messaging opportunities for advocates of lower taxes and smaller government by linking these concerns to the economy. These messages resonate well across a wide range of demographic groups, including Democrats and women.

Appendix Slide
(1% or more of
respondents)

FEDERAL RESPONSIBILITY

Open-ended responses

What do you think is the most important thing the federal government should be responsible for doing?



Understanding Independent Voters

Gary Andres

