



Global Perspective.
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ReynoldsAmerican



National Image Survey

Conducted April 5 - 7, 2010

n=841 registered likely voters

MoE = +- 3.4% @ 95% Confidence Interval





Research Design

Wilson Research Strategies conducted a research study of 1,000 adults nationwide. Of those, 841 reported that they were registered to vote and were very likely or somewhat likely to vote in the upcoming 2010 midterm elections.

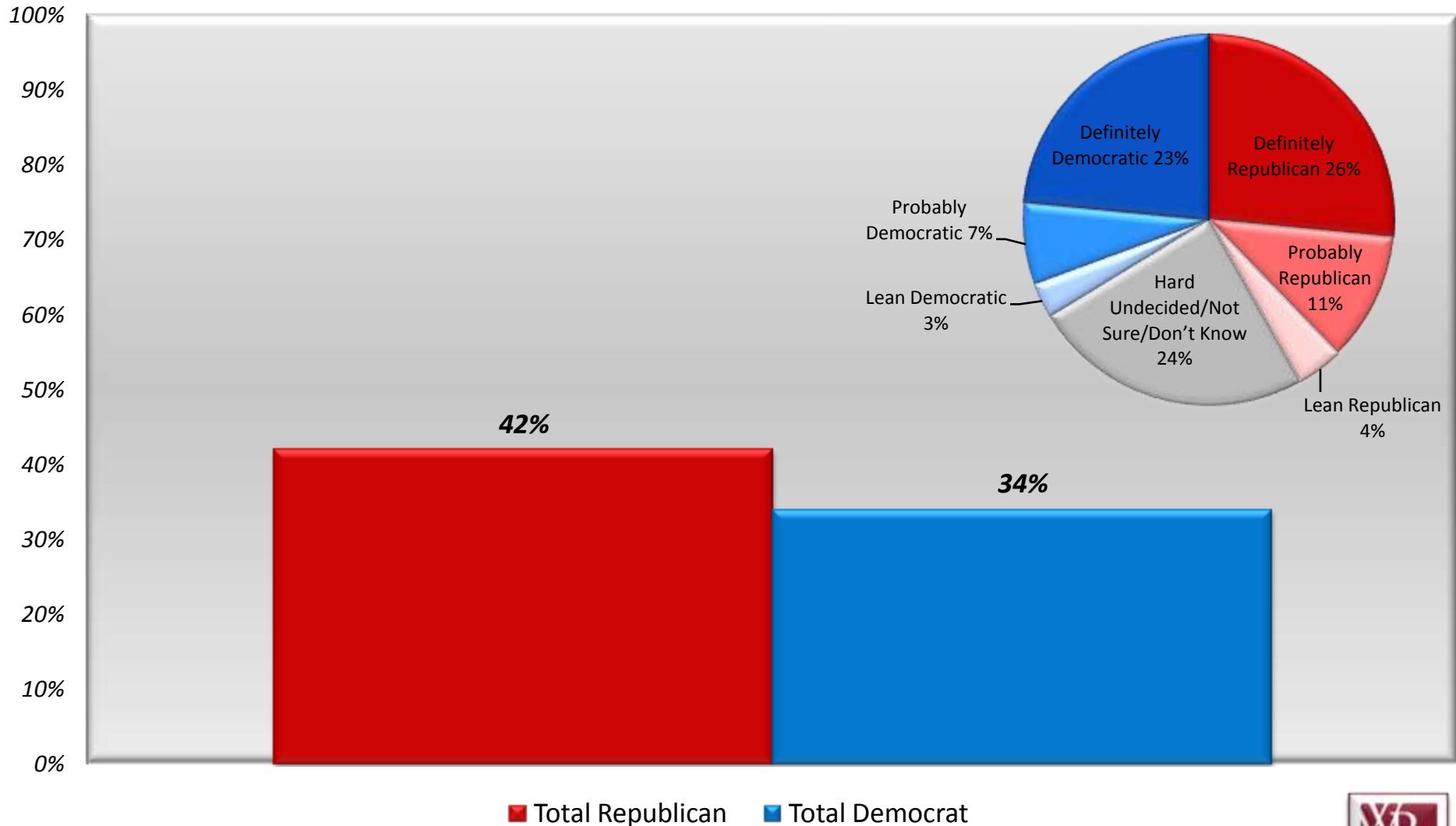
A random sample of adults was chosen using random digit dialing (RDD). The sample was weighted by age, region, race, gender, party, and educational attainment to ensure that our results accurately match the national population.

Respondents were contacted by phone via a live telephone operator interview April 5-7, 2010. The study has a sample size of n=841 likely voters. The margin of error is equal to $\pm 3.4\%$ in 95 out of 100 cases.

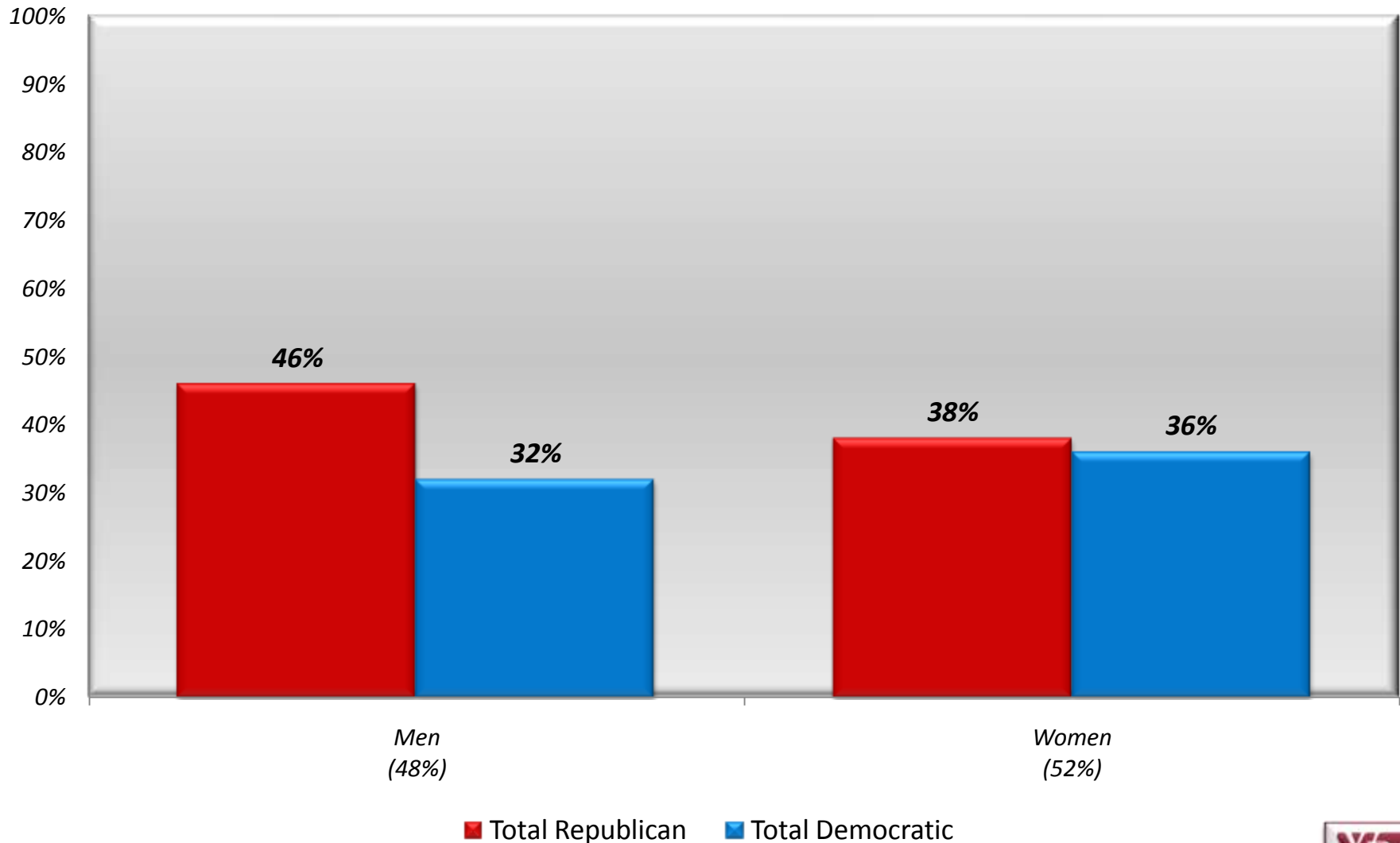
Chris Wilson, CEO, Bryon Allen, COO and Chris Perkins were the lead researchers on this project. Alexander Brunk, William Burr, Daniel Narvaiz and Katie LaPotin provided project management and analytical support.



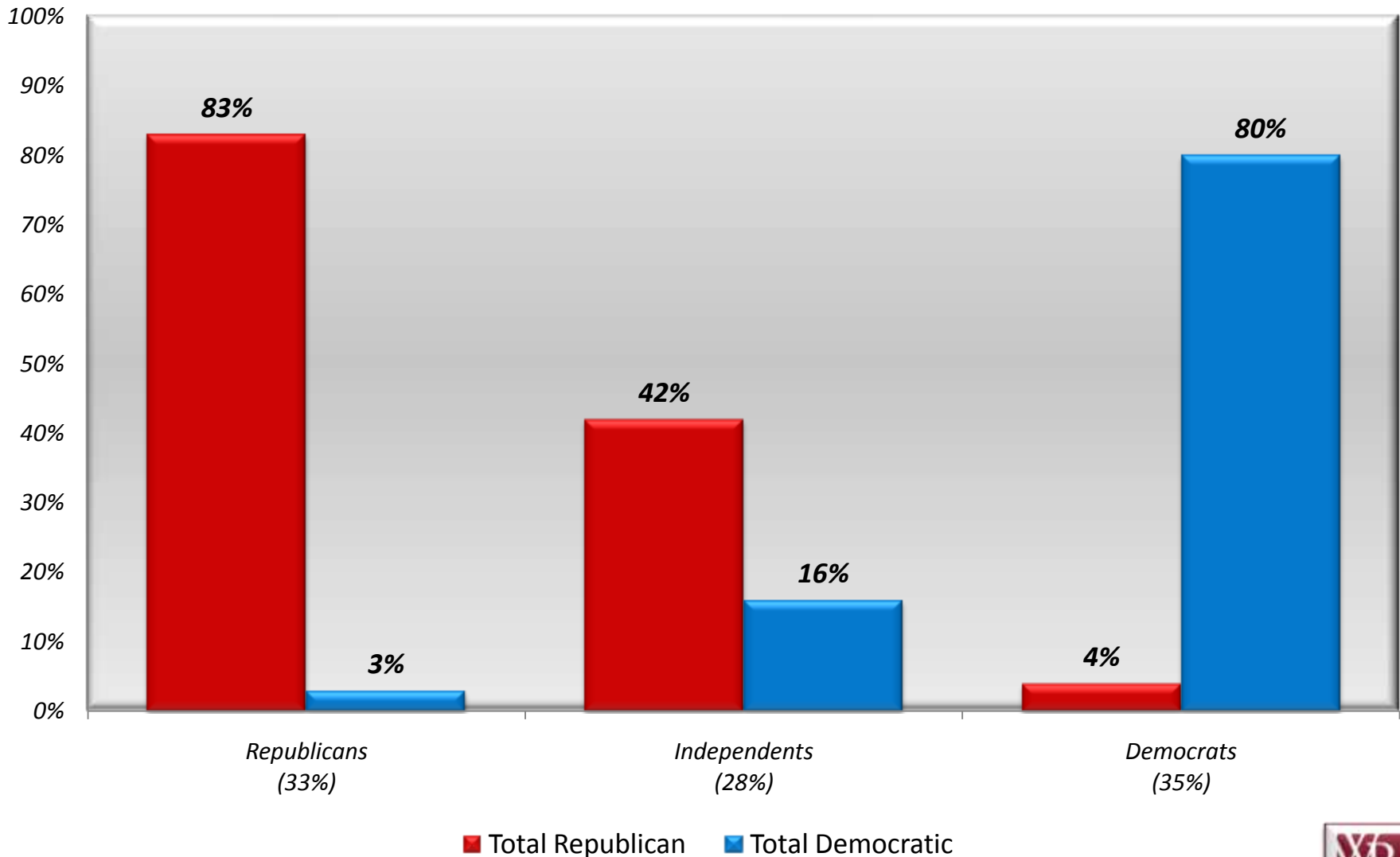
A plurality of likely voters nationwide would vote for the “generic” Republican over a Democrat.



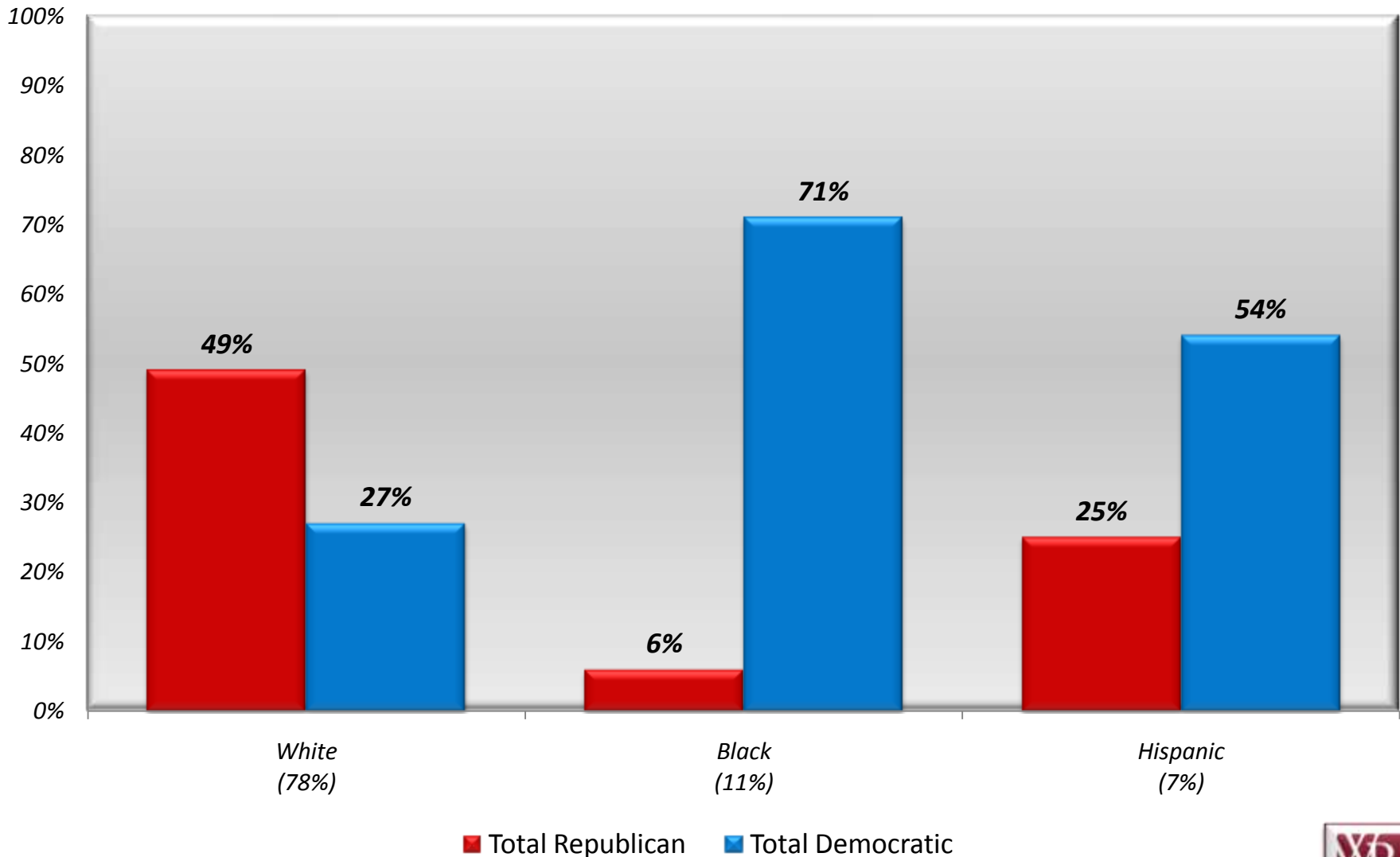
Men prefer a Republican by nearly fifteen points, while women only narrowly favor the GOP candidate.



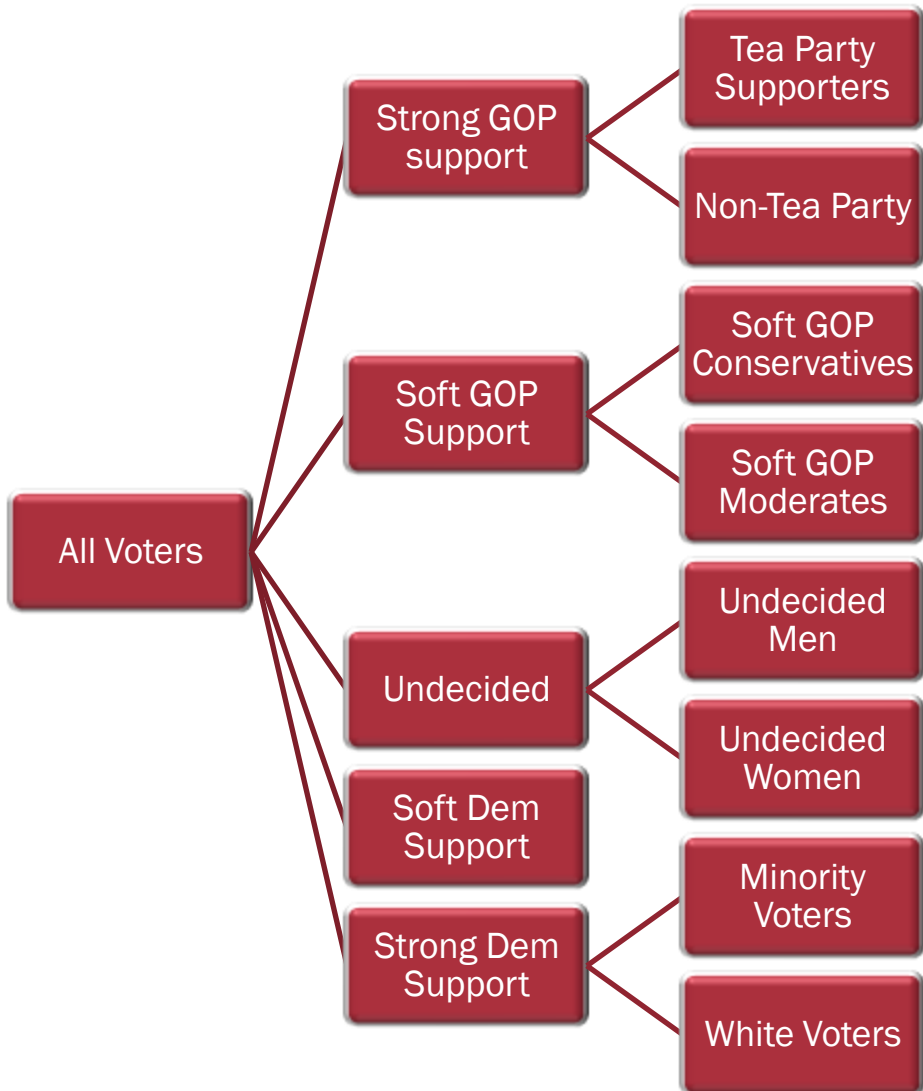
Support for a generic Democrat among Independents has shrunk to fewer than one in five voters.



While a strong plurality of White voters will support a Republican, the GOP still loses badly among Blacks and Hispanics.



WRS used our advanced segmentation techniques to break likely voters down by demographic and party preferential characteristics.



The following sub-sections will give a description of each of the key voter segments as well as a brief discussion of what each group cares the most about.





Strong Democrat Minority Voters





Strong Democrat Minority Voters (8% of the electorate)

Who are they:

- Older voters (55+)
- 64% Female
- Less likely to be married
- Fixed income and more limited educational attainment
- 37% live within a city

These voters are mostly older females who are less likely to be married. More than a third did not attain education after high school and earn under \$40K annually. These voters tend to reside in the south and believe in a government regulated market system.





Strong Democrat White Voters





Key Targets: Strong Democrat White Voters (14% of the electorate)

Who are they:

- Majority Male (55%)
- Tend to live in central United States
- More likely to not have children living at home
- 26% aged 55-64
- A third affiliate with a non-Christian religion
- More than half have obtained at least a college education

These voters reside in the central United States and are more socially liberal than the rest of the country. A majority of these voters are educated males who are more likely than the population at large to not have children living at home.





Soft Democrat Voters





Key Targets: Soft Democrats (11% of the electorate)

Who are they:

- Majority are female (60%)
- Catholic (31%)
- 19% African-American
- Middle class
- 25% young voters
- Tend to live in cities and in western United States

These young voters tend to be more moderate in their political beliefs. They are middle class workers who are less likely to have a family than the overall electorate.





Key Targets: Soft Democrats (11% of the electorate)

What do they care about?

- Socially liberal
- Believe in a regulated market system
- Support big government
- These voters tend to want more government invention in their lives
- While they are concerned with the economy they are also concerned about the cost and availability of quality health care





Undecided Male Voters





Key Targets: Undecided Male Voters (11% of the electorate)

Who are they:

- 26% live in Northeastern United States
- Middle Class
- More than 80% white
- More likely to be single compared to the overall electorate
- Middle aged, 35-44
- 61% consider themselves Independent

More than half of undecided male voters do not affiliate with either party. They are middle class white workers who are less likely to have a family.





Key Targets: Undecided Male Voters (11% of the electorate)

What do they care about?

- Ideologically similar to the country as a whole
- Populist
- These voters tend to want slightly less government invention in their lives
- Being young and single, their overall concern is getting the economy back on track for future generations





Undecided Female Voters





Key Targets: Undecided Female Voters (13% of the electorate)

Who are they:

- Two-thirds live in small or rural towns
- 28% are 65 or older
- Two-in-five attended high school or less
- Nearly half consider themselves moderate
- Lower income – under \$20K annually

Nearly half of undecided female voters are moderate in their political beliefs. A majority live in small cities or rural towns throughout the United States. They also tend to be widows who are less educated.





Key Targets: Undecided Female Voters (13% of the electorate)

What do they care about?

- Ideologically similar to the country as a whole
- These voters tend to want slightly more government intervention in their lives
- Being older and less educated, their overall concern is getting the economy back on track and saving for retirement





Soft Conservative Republicans





Key Targets: Soft Conservative Republicans (8% of the electorate)

Who are they:

- Majority Male (56%)
- Overwhelmingly White (96%)
- More likely to be married than the overall electorate (82%)
- Middle class
- 32% live in central United States
- Evangelical Christians

Soft conservative Republican voters believe in traditional conservative values. They are overwhelmingly white married males who reside in small or rural towns in the central United States. A plurality are middle class Evangelicals who attended at least some college.





Key Targets: Soft Conservative Republicans (8% of the electorate)

What do they care about?

- Socially conservative
- Strongly believe in a free market system
- Populist
- These voters want little to no government intervention in their lives
- Since these are married individuals it is important for them have job security and a steady economy.





Soft Moderate/Liberal Republicans



Key Targets: Soft Republican Supporters - Moderate/liberal ideology (7% of the electorate)



Who are they:

- 71% are married
- 38% live in the suburban areas
- More than a quarter earn at least \$100K annually
- More likely to be Catholic than the electorate at-large
- Middle aged, 35-44
- 25% live in northeastern United States

Soft moderate or liberal Republican voters believe in traditional social values. They tend to be catholic and married individuals who reside in suburban areas in central United States. These voters are also more educated and have higher incomes than most of the country.





What do they care about?

- Believe in a free market system over a regulated system
- These voters want less government intervention in their lives
- These are wealthy married individuals but it is important for them to have job security and a steady economy





Strong Republican Non-Tea Party Supporters





Key Targets: Definite GOP Non-Tea Party Supporters (17% of the electorate)

Who are they:

- Majority Male (57%)
- Overwhelmingly White (92%)
- More likely to be married than the overall electorate
- Baby Boomers – aged 55-64
- 27% live in western United States

These voters are traditional Republicans with conservative values. They are mostly white males who tend to be married and live in small cities or rural towns throughout the western United States.





Key Targets: Definite GOP Non-Tea Party Supporters (17% of the electorate)

What do they care about?

- Socially conservative
- Favor a free market system
- Somewhat Populist
- These voters are tired of government intervention in their lives
- The economy and out of control government spending concerns them the most





Strong Republican Tea Party Supporters





Key Targets: Definite GOP Tea Party Supporters (10% of the electorate)

Who are they:

- Majority Male (58%)
- Overwhelmingly White (88%)
- More likely to be married than the overall electorate (79%)
- Middle aged, 31-45
- 40% live in southern United States
- 25% earn at least \$100K annually
- Half have a college education or more

Republican Tea Party supporters have strong conservative values. They are mostly white middle aged married men who live in southern United States. More than half earn at least \$100K annually and are likely to have children under the age 18.





Key Targets: Definite GOP Tea Party Supporters (10% of the electorate)

What do they care about?

- Socially conservative
- Strongly believe in a free market system
- Very Populist
- These voters are tired of government invention in their lives
- They are less concerned with health care and more concerned with the economy and coming in under budget while improving services





WHAT'S THE STORY WITH THE TEA PARTY?





What about the Tea Party supporters?

Who are they:

- Mostly men (56%)
- 77% are married
- Slightly older than overall population, but still spread out among age groups
- More than 8 in 10 (85%) view the Democratic Party unfavorably
- More Republican and Conservative than the general population
- Less likely to be from a lower-income background.



The Tea Party Movement and its effect on Conservative grassroots mobilization will be important in November 2010.



Now about a year old, the “Tea Party” movement shows no signs of dying down. There are a number of ongoing protests all over the country leading up to April 15th.

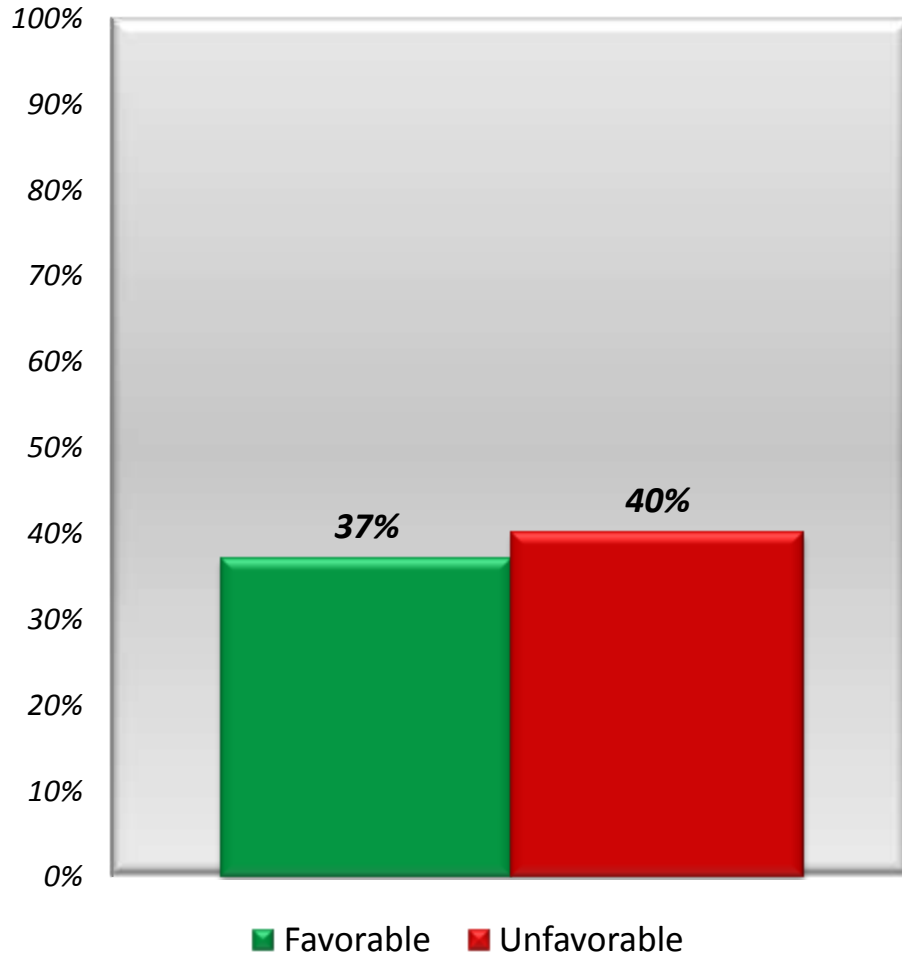
“Tea Party Express” Bus Tour March 27 – April 15



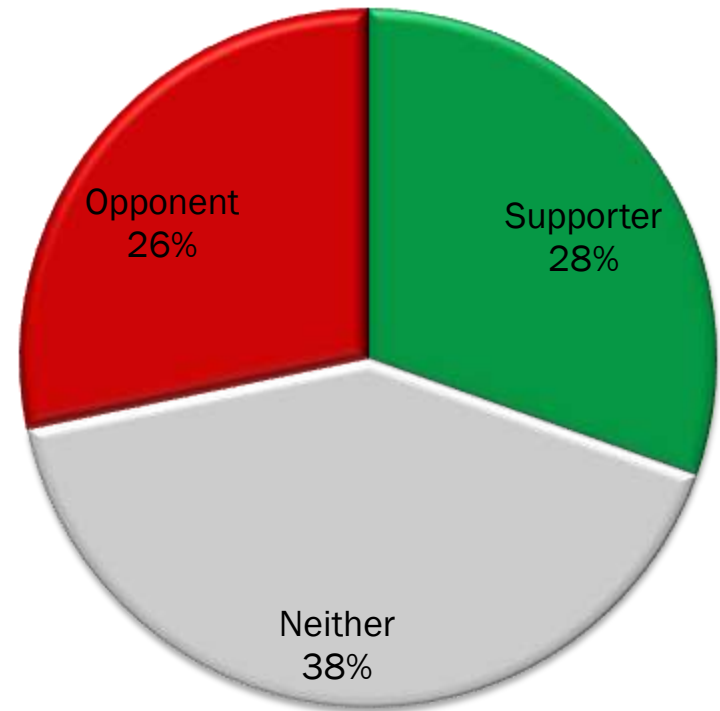
Recent polling shows that the American public is divided over their support for the Tea Party movement.



Tea Party Favorability



Supporter of Tea Party Movement



Source: USA Today/Gallup, March 26-28, 2010. n=1033 Adults, MoE=±4%

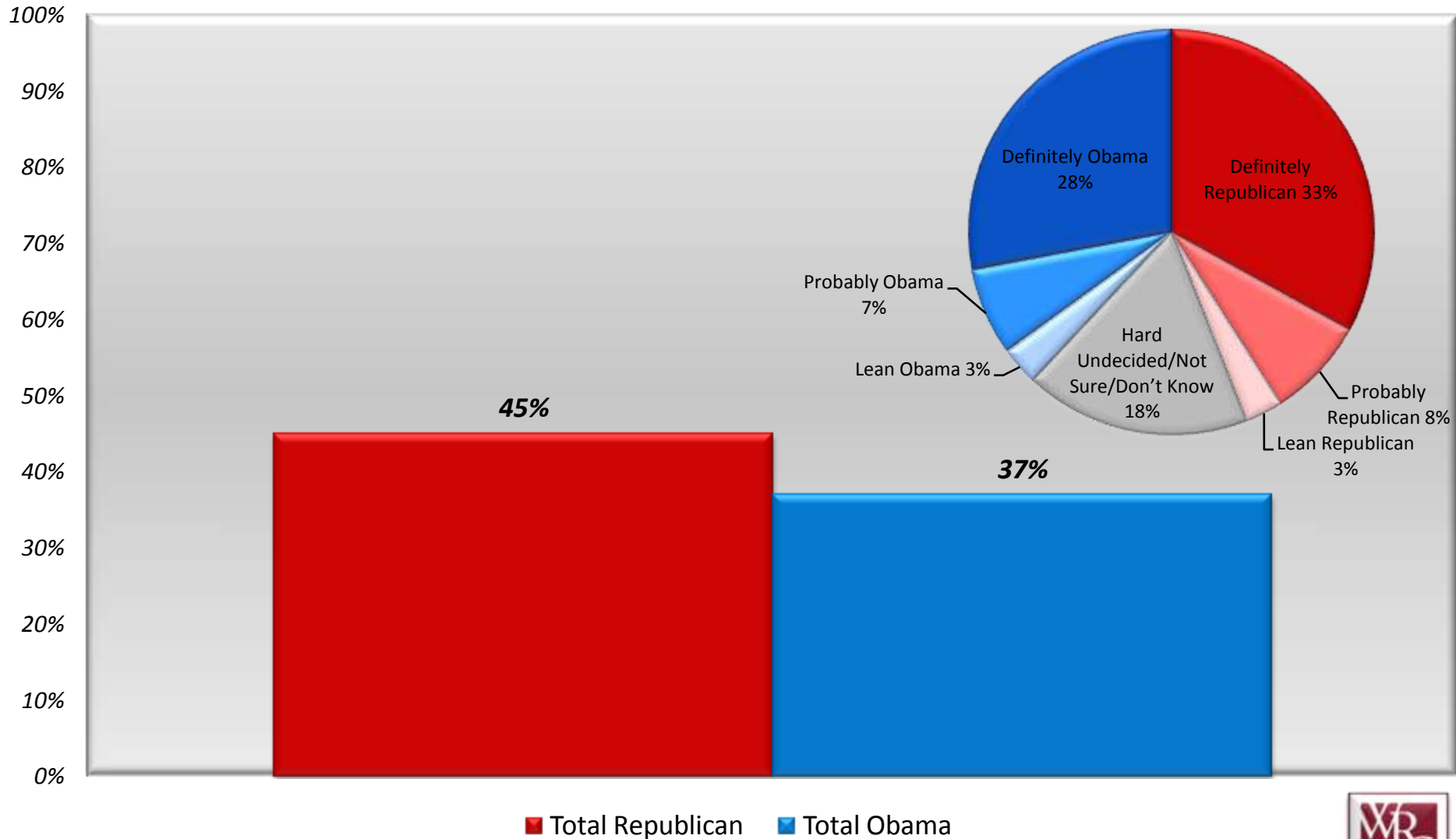




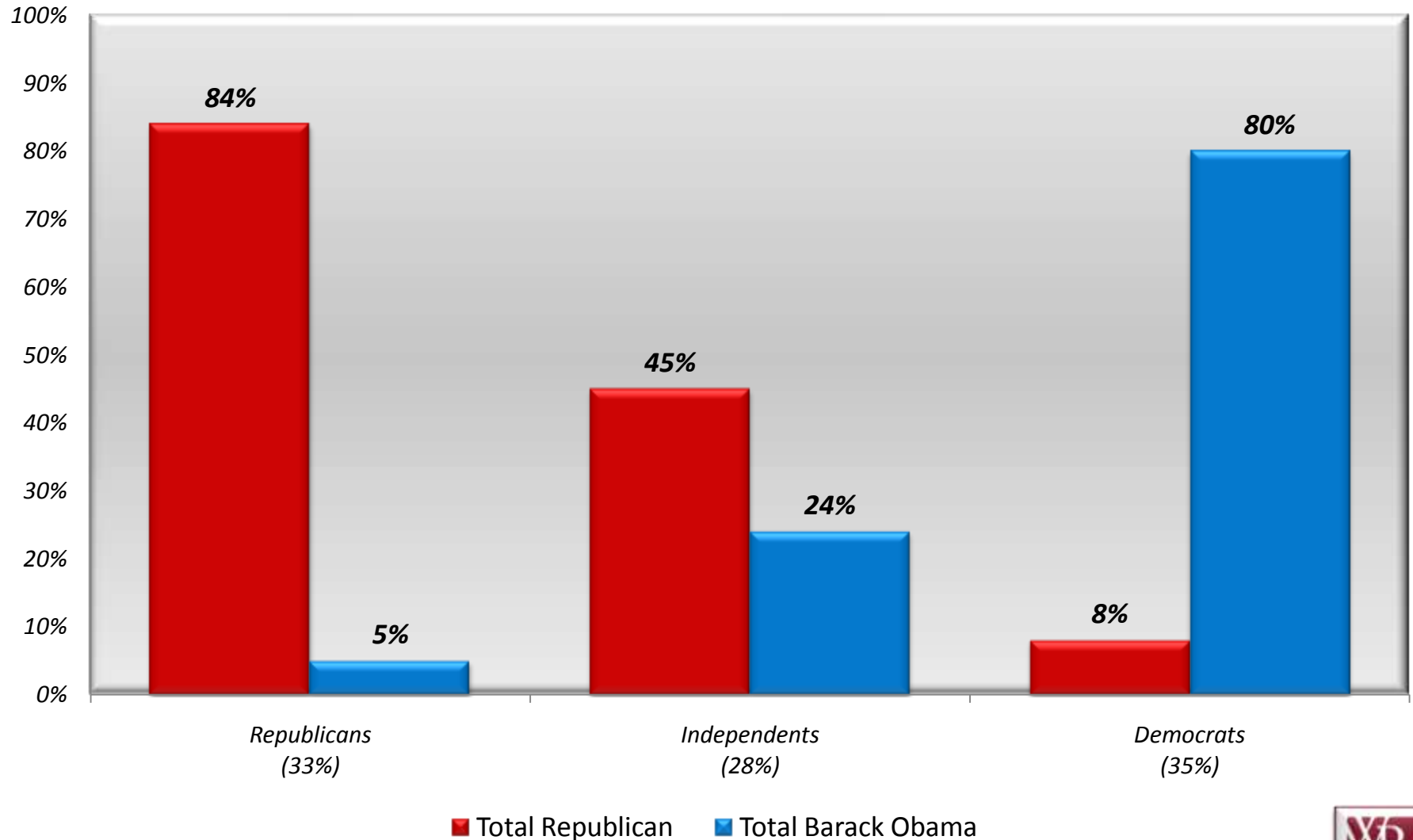
WRS SURVEY DATA – 2012 PRESIDENTIAL ELECTION



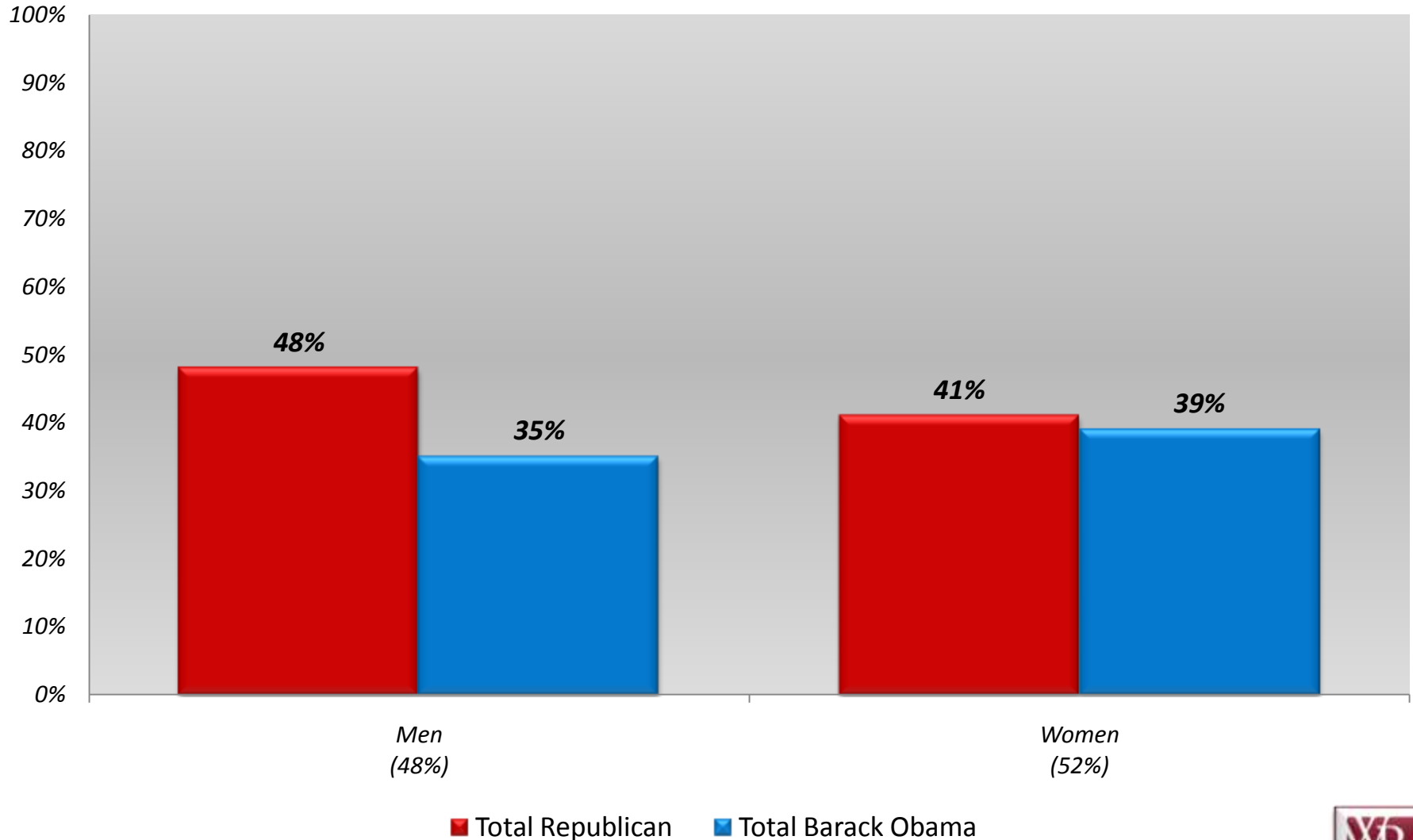
Likely voters are more likely to vote for a “generic” Republican candidate for President over Barak Obama in 2012.



While Obama still wins the votes of eight in ten Democrats, his support among Independents has plummeted, however.



A generic Republican has a big lead against Obama among men, but is within the margin of error with women.





Who are the 2012 swing voters?

Who are they:

- 57% are women
- Skewed toward West and Northeast
- 47% are Independents
- Lower income and education than average
- Spread out across all age groups
- More than one in five (22%) are single

These are voters who mostly voted for Obama in 2008, but aren't sold on voting for him again. They tend to be moderate Independents who voted for change but don't entirely like what they got.





Who are the 2012 swing voters?

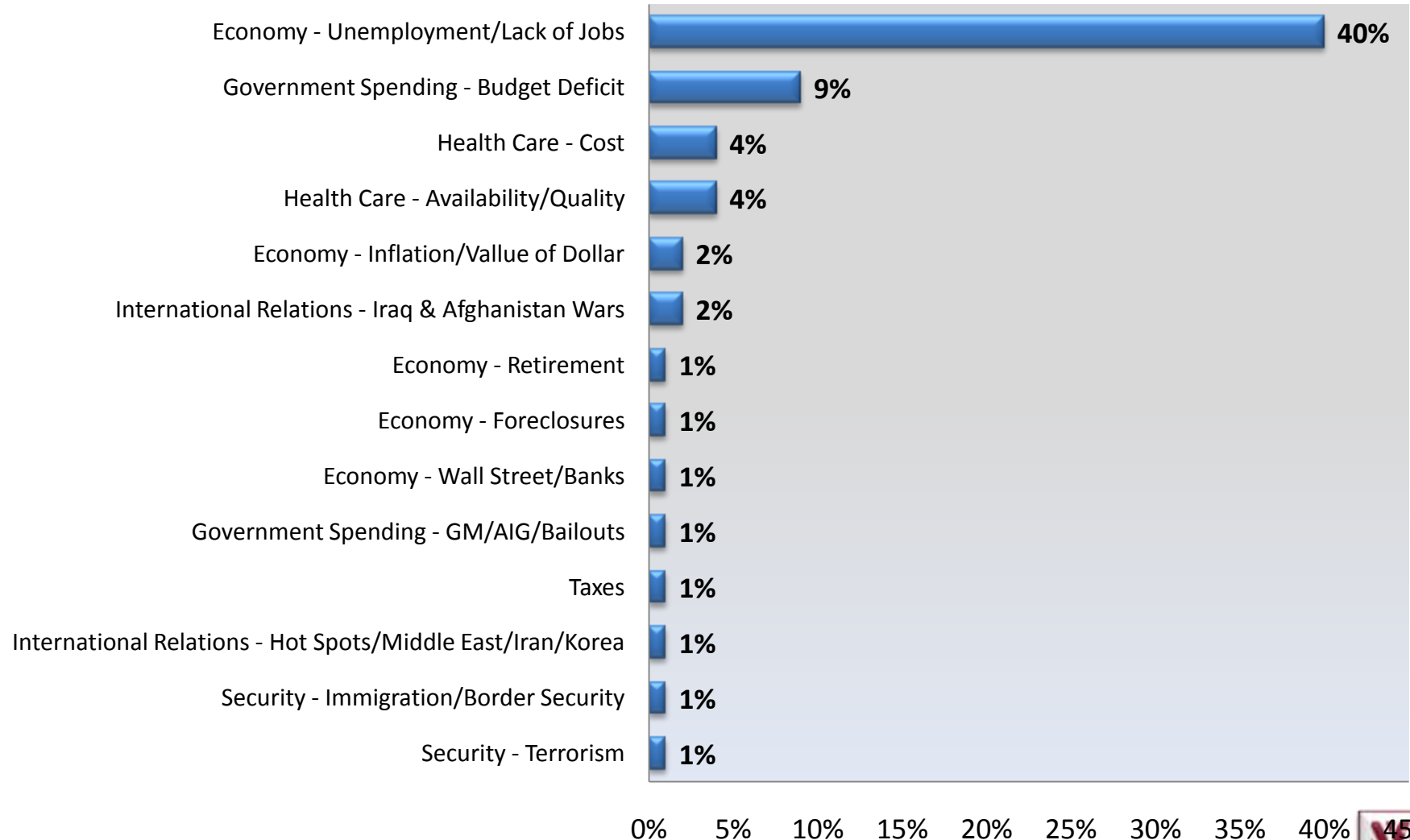
What do they care about:

- Nearly half (49%) say their top issue is jobs and unemployment
- Believe government is doing too much to intervene in the economy, have a populist attitude toward big business/big government
- More socially liberal than the general population

Bottom line: 2012 swing voters will be swayed based on who they believe will be a better steward of the economy.



Unemployment and lack of jobs is the single biggest problem facing the U.S. right now. Talking about anything else is a waste of communications resources.

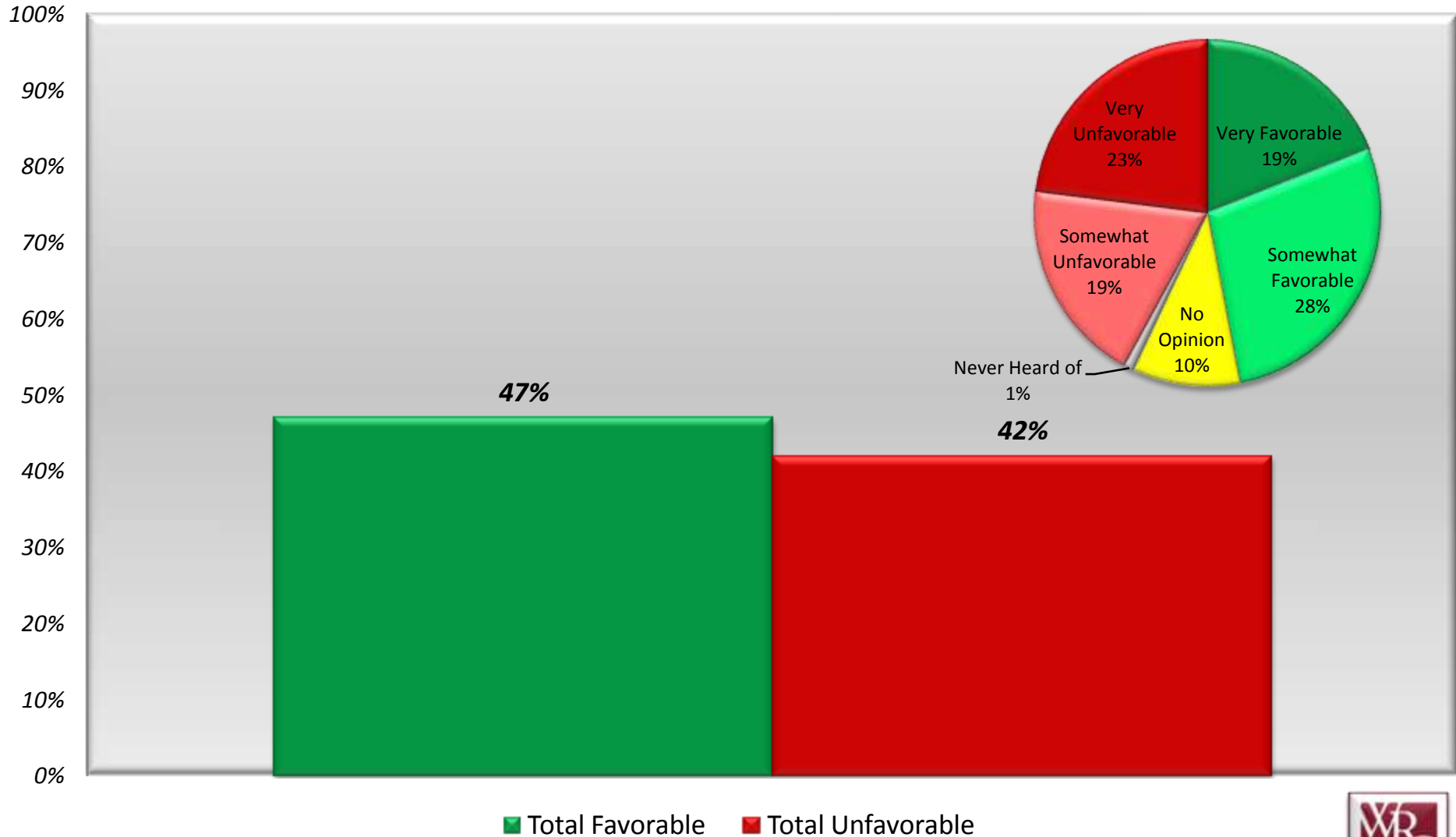




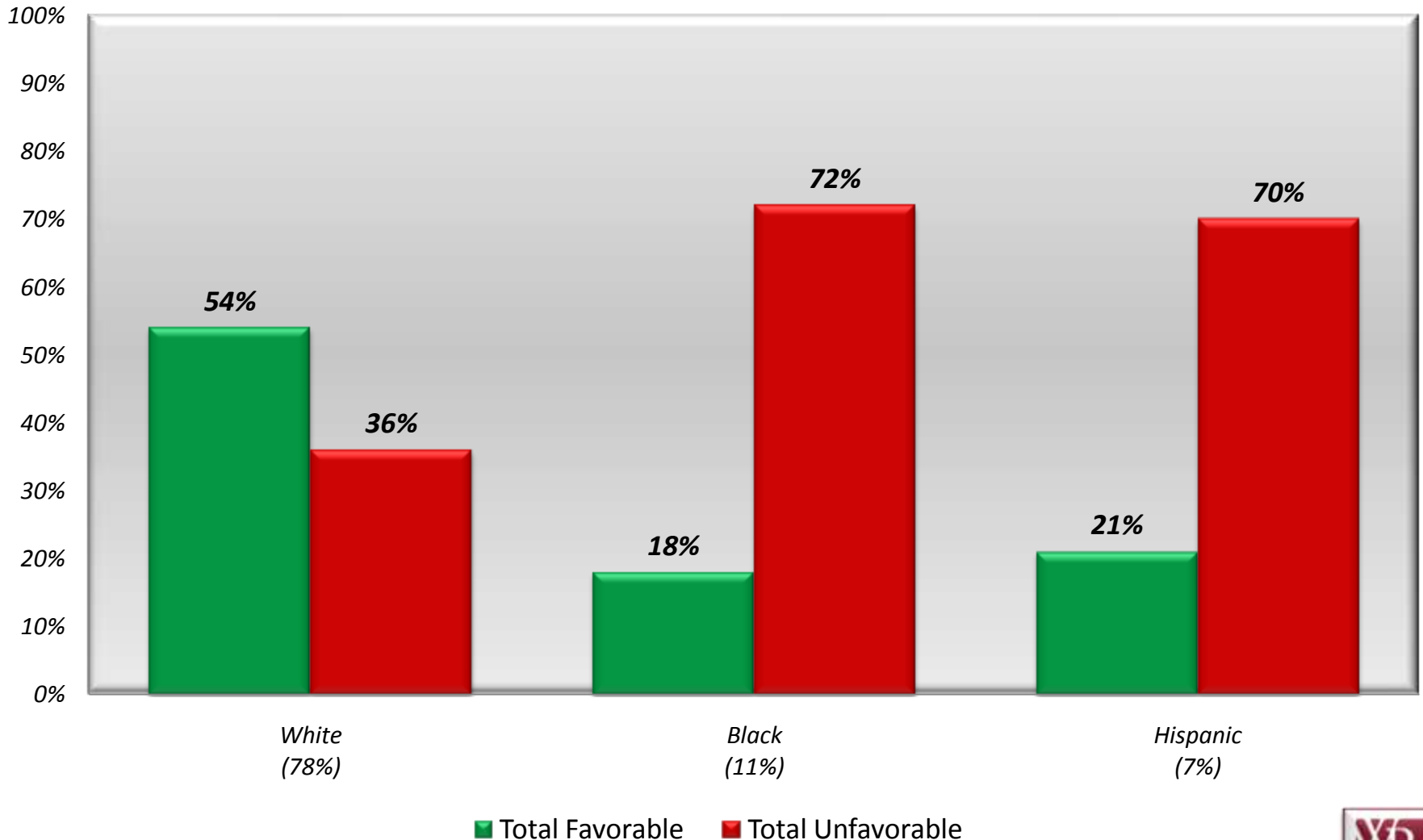
WRS SURVEY DATA – IMAGES OF THE TWO PARTIES



A small plurality of likely voters have a favorable impression of the Republican Party.



A majority of White voters view the GOP favorably, while the vast majority of Blacks and Hispanics view Republicans unfavorably.





Key Targets: Somewhat Unfavorable Image of Republicans (19% of the electorate)

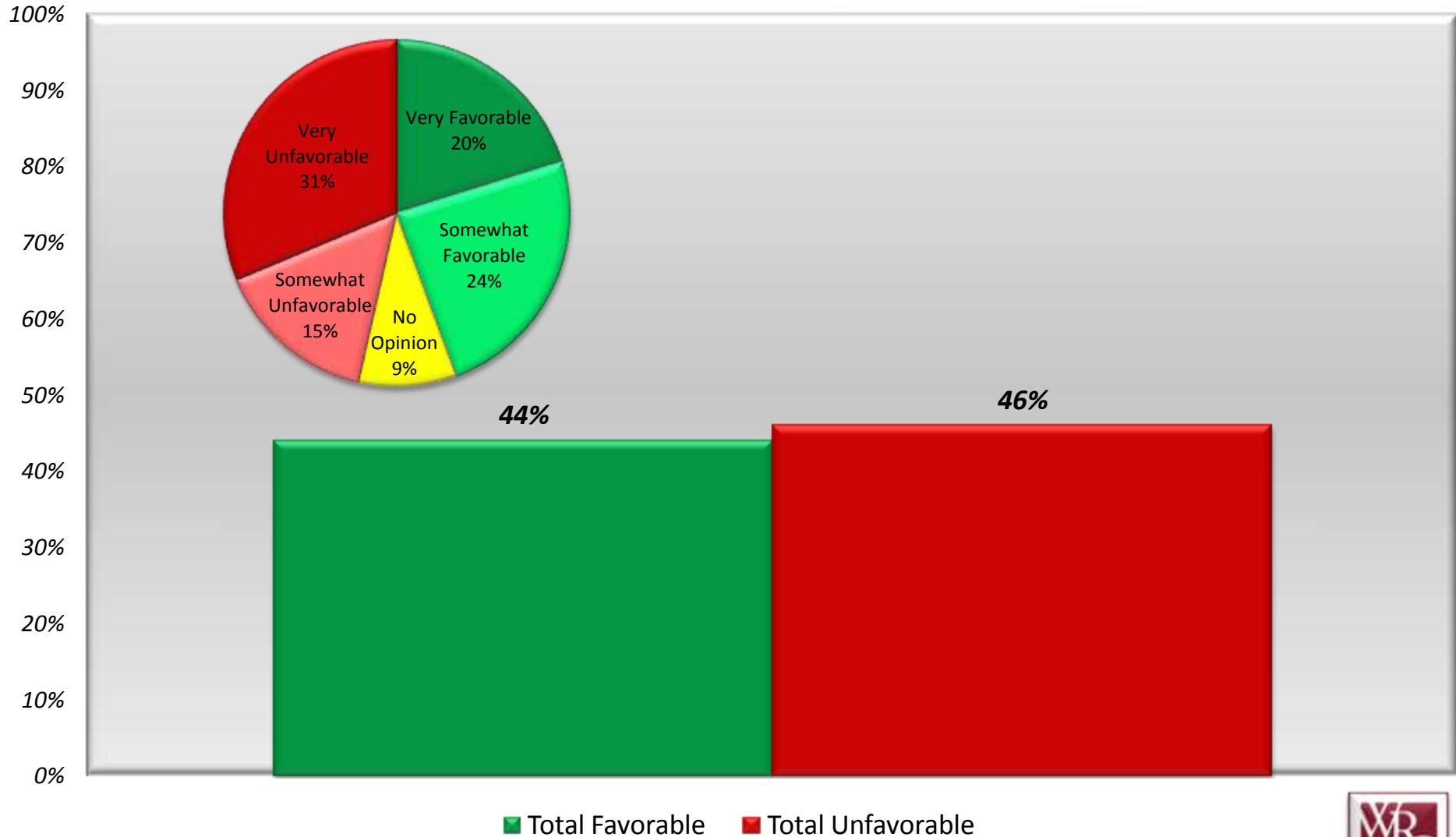
Who are they:

- Upper-Middle class
- 24% live in a city
- More likely to be African-American than the electorate at-large
- 44% moderate
- Baby boomers, 55-64
- Half are at least college graduates

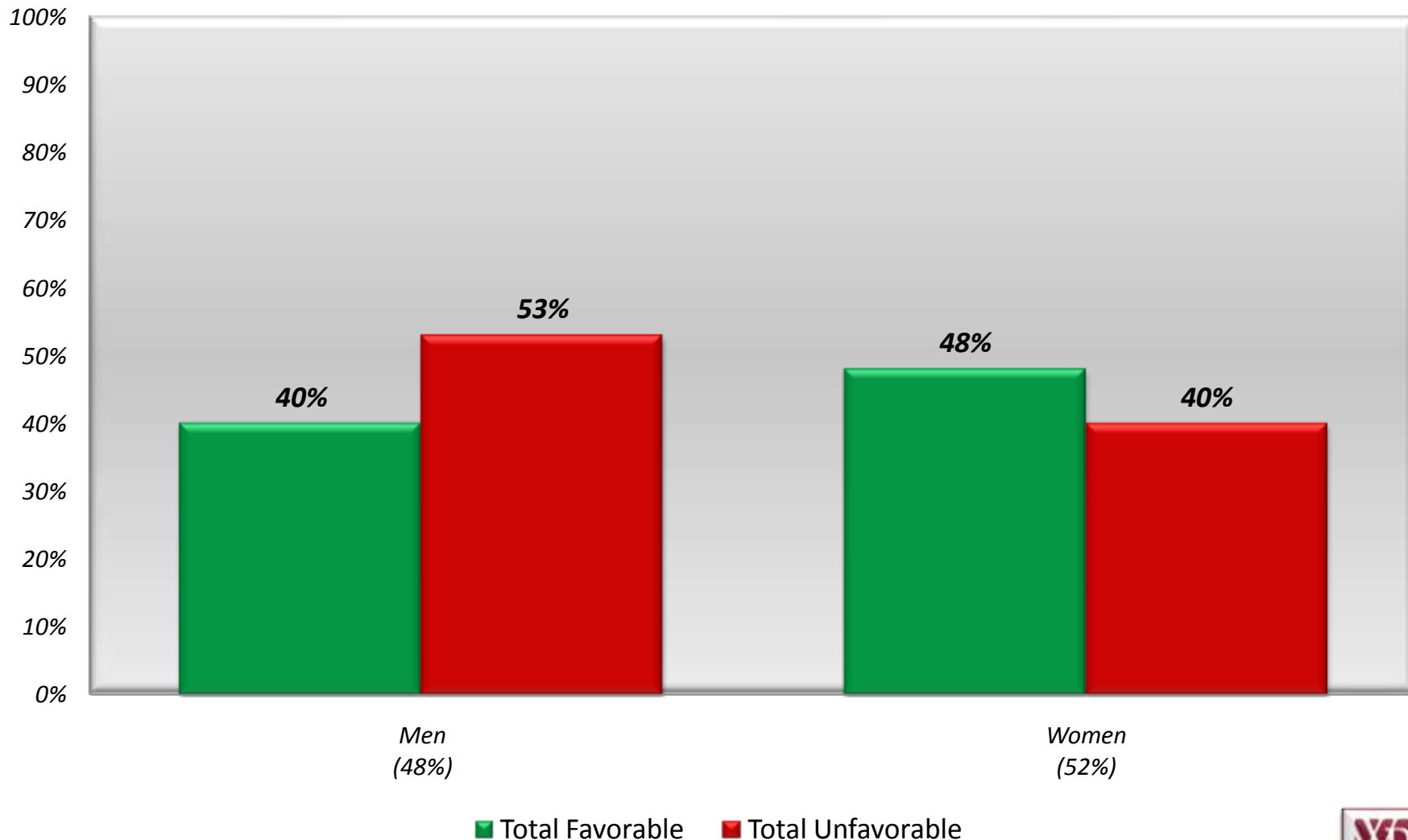




Voters have a slight negative impression of the Democratic Party.



A majority of men view the Democrats unfavorably, while a plurality of women view them unfavorably.





Key Targets: Unfavorable Images of Democrats (46% of the electorate)

Who are they:

- Overwhelmingly white (88%)
- 44% live in the south
- Middle aged, 35-44
- A plurality live in suburban areas
- Evangelical
- Most attended at least some college





Key Targets: Unfavorable Images of Both Parties (10% of the electorate)

Who are they:

- Two in three (65%) are men
- One in four (24%) are Tea Party supporters
- Plurality are moderate Independents
- Tend to be 55 or older
- Most attended at least some college





Key Findings

2010 Generic Ballot:

- A Republican candidate leads a Democrat candidate by an 8 point margin (42% - 34%)
- Republican's hold a 26 point advantage among independent voters (42% - 16%)

Party Image

- The Republican party is viewed favorable by 47%, compared to 42% which have an unfavorable opinion
- The Democrat party is viewed favorable by 44%, compared to 46% which have an unfavorable opinion

2012 Presidential Ballot

- A “generic” Republican candidate leads Barack Obama by an 8 point margin (45% - 37%)
- Among independent voters, the Republican candidate holds a 21 point lead (45% - 24%) over President Obama





WILSON RESEARCH STRATEGIES



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We do much more than collect information. We interpret and analyze data to develop actionable strategies and tactics to best position our client versus the competition.