



Findings from a Nationwide Survey of 700 Likely 2012 General Election Voters

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Methodology

- Lake Research Partners designed and administered this survey that was conducted by telephone using professional interviewers. The survey reached a total of 700 likely 2012 General Election nationwide. The survey was conducted May 3rd through May 5th, 2011. The margin of error for this poll is +/- 3.7%.
- Telephone numbers for the sample were generated from a file of registered voters. The sample was stratified geographically to reflect the expected turnout of voters in the 2012 General Election. The data were weighted slightly by gender, age, race, education, party identification, and region.
- Four focus groups were designed, conducted, and moderated by Lake Research Partners. The focus groups consisted of: 1) college-educated women in Richmond, VA; 2) mixed gender small business owners in Richmond, VA; 3) blue-collar men in Southfield, MI; 4) blue-collar women in Southfield, MI.

Key Findings

- This study provides clear direction not only on existing attitudes on government regulation, but also identifies the arguments and themes that can shape those attitudes as well as the barriers to success, including most prominently the public's increasingly vitriolic cynicism toward politics and government.
- Given the frankly tawdry image of government regulations—and government, more generally—it is encouraging that voters still recognize their merits and start out with a plurality in favor of increasing regulation of big business and corporations (40% favor to 23% oppose), even in spite of a majority of voters' intense concern regarding overregulation (54% worried about too much regulation, 48% worried strongly). Moreover, an engaged debate over the issue results in positive movement, garnering majority support for greater regulation, particularly when our message framework plays on themes of accountability and protection and extols the collective successes that regulations have achieved for Americans over the years while presenting current critiques that capitalize on voters' key concerns, highlighting the areas where they believe regulations have left them open to harm (51% favor to 28% oppose). This dynamic argues for education around past successes as a key component of our communication strategy.
- Voters are able to identify numerous positive aspects of regulations, often citing protection and safety as initial impressions. They regard government regulation as one way to protect people from physical harm and prevent bad things from happening before they occur, though messages that invoke preventative action without acknowledging government's recent failures fall flat.
- While people strongly support regulation in the economic arena, they generally believe regulations have failed to protect people from *economic* harm, ensure oversight of foreign imports, or hold big businesses—or government, for that matter—accountable to the people. The public is more divided on whether regulation has stopped the dangerous pollution of our air, land, and water, and whether it has protected the most vulnerable among us, especially when the “vulnerable” are identified as children and seniors.
- Support for greater regulation notwithstanding, voters worry far more about too much government regulation of business than too little (less so when the question is framed to include “big business and corporations”), and generally believe the emphasis should be on enforcement of existing regulations rather than adding new regulations. They are also very protective of small businesses, and that in fact is the most potent economic argument against regulation—more than that they are a job-killer or their cost.
 - As we saw in the focus groups, much of the skepticism around government regulations stems from voters' lack of faith in the government itself. Fewer than three-in-ten voters trust the government in Washington to do what's right just about always or most of the time. Voters also believe government—including the regulatory process—has been captured by politics and lobbyists and the special interests. In fact, this is a major area where voters want more regulation.

Key Findings (continued)

- The focus groups and survey demonstrate that the biggest concern around regulations is their cost, not that they kill jobs. We have been seeing this crop up in other work for awhile. Voters find it easy to believe that regulations will increase costs for themselves and small businesses. In these tough times, it's always easy to argue that something costs money. However, the strongest predictor of opposition was hurting small businesses. That's the real economic vulnerability we need to worry about. Voters remain very protective and fond of small businesses. Consequently, our arguments that attempt to argue that small businesses were helped by regulation fall flat.
- The suspicion voters harbor toward regulations is highlighted by perceptions of red tape, bureaucracy, costliness, and harm to small businesses. To a lesser extent, voters believe that regulation increases the deficit and causes uncertainty in the marketplace. They split on other negative characterizations of regulation, including that it is a job killer and unnecessary, though these perceptions should be actively countered as regression analysis indicates they predict most powerfully toward opposition.
 - When it comes to specific agencies, with the exceptions of OSHA and the USDA, voters are highly critical of current performance.
- Voters tend to believe that regulations have increased in recent years, which is generally regarded as an unwelcome development. A solid majority believes they have become less effective in that time as well, though voters split on this question when it is asked in the context of Obama's tenure (as Democrats and independent women coalesce behind the President). Contrary to conventional wisdom, referring to Obama increases support. The prevalence of these attitudes only underscores the need for advocates to co-opt the call for greater enforcement.
- The industries where the public would most like to see greater regulation tend to be products, goods, and services that the U.S. imports from abroad (slightly more so even than food and drugs from abroad), the oil companies, Wall Street banks and the financial industry, credit card companies, the lending and home mortgage industries, and “big business”, in general. Not surprisingly, majorities would also like to see greater regulation of government officials and special interests and lobbyists, and with significant intensity. Combining oversight of government and politics with our call for regulation significantly increases support and updates our arguments.
- There is reduced, but still plurality, support for additional regulation of our air and water, the nuclear industry, the safety of workplaces, and food and drugs produced in the U.S. While oil and gas companies—and gas prices, specifically—all provoke noticeably intense calls for greater regulation, they are also among the most polarizing of the entities explored in this study. This is particularly true for gas prices, where 46% favor increased regulation and 43% oppose.

Key Findings (continued)

- Voters make very differentiated judgments about messages in favor of greater regulation of big business and corporations. Several arguments are highly persuasive, and several are far less compelling.
- The most persuasive messages revolve around accountability in government—especially regarding the influence of special interests—and in the financial sector, economic populism (with references to large scale theft-by-CEO), protecting the most vulnerable (also with references to Wall Street), and rebuilding the middle class. Noticeably, adding in a strong dose of regulating special interests taps into and co-opts the anti-political sentiment, increases the reach and intensity of messages, and makes our arguments current.
 - **[PUT PEOPLE FIRST]** Washington lobbyists have the time, money, and power to affect the decisions politicians make. Too many of our representatives have met behind closed doors with the special interests, taken their money, and done their bidding. It’s time for our government to realize they need to make decisions that are in the best interest of the people, not the special interests. Regulation and oversight of special interests and politicians can promote transparency, greater openness, and accountability to all Americans.
 - **[PROTECT MOST VULNERABLE]** Protecting the most vulnerable in our society is part of who we are as Americans. We need to protect our seniors and families from having their life savings and retirements stolen or gambled away by Wall Street We need regulations that ensure that products, both domestic and foreign, are safe—especially when it comes to our seniors and children. We need to take extra steps to protect the most vulnerable in our society.
 - **[MIDDLE CLASS DISAPPEARING]** More and more Americans are falling out of the middle class. We need commonsense regulations that protect our families so that people don’t lose their homes and savings because somebody on Wall Street gambled them away, or sold them a faulty financial product. We need protections for families who work hard and play by the rules to build a better future for themselves and their children.
 - **[ECONOMIC POPULIST]** The C.E.O. of a corporation has no more right to steal your money and life savings than a thief on the street. The C.E.O.s who wrecked our economy, took bailout money, and then gave themselves big bonuses should be held accountable to the taxpayers and small businesses they stole from. By enacting and enforcing sensible regulations that promote fairness and oversight, we can send a signal that this criminality won’t be tolerated, and we can help prevent these types of abuses.
- Still not every reference to Wall Street—or populism, for that matter—elevates a message into the top tier, as we see with arguments framed around preventative action, the mortgage crisis, and helping small businesses.
- The language used to characterize regulation matters less than conventional wisdom suggests—regulations, protections, and safeguards all tested similarly in the focus groups and the survey. However, capturing the frame of “protection” is powerful and establishes a villain.

Dynamics of Initial Support for Greater Regulation

- A majority of voters' intense concern regarding overregulation (54% worried, 48% worried strongly) does not impede favorability toward greater regulation. In fact, voters start out tepidly in favor of greater regulation of big businesses and corporations, with support outpacing opposition (40% favor to 23% oppose). Over a third of voters are neutral or unsure on the issue (37%).
- The groups that start out disproportionately in favor of greater regulation include voters who oppose the Tea Party movement, older Democrats, younger independents, college-educated women, younger women, voters in their forties, unmarried voters, and African Americans.
- At the outset, the groups who are most opposed to greater regulation include Republicans—especially strong Republicans and Republican men; supporters of the Tea Party movement—especially men who support the Tea Party; small business owners and employees; men—especially college-educated men, younger men, married men, and men living in the South; and younger college-educated voters.
- Voters with a high school diploma or less, older non-college educated voters and non-college educated women, African Americans, seniors, weak Republicans and older Republicans, independent women, older men, voters living in the Midwest, Latinos, mothers, and older voters living in the South are all disproportionately undecided initially.
- Though the above groups are disproportionately undecided, the profile of the neutral or unsure voter—and thus one key target—is a non-college educated, married woman over the age of 50, who is more likely to be a Democrat and living in the South.

Engaged Debate

- After hearing arguments on each side of the regulation debate, nearly half (47%) of voters favor greater regulation of big businesses and corporations, with noticeable shift among Latinos, voters in the West, and non-college educated women. Although support grows more than opposition in this scenario, the intensity bolstering each side remains statistically tied.
 - The stronger message framework builds on existing perceptions of regulations' ability to protect people from harm while tapping into voters' antipathy toward Wall Street and special interests—and picks up support across the board. A framework built around resolving uncertainty, and anchored on helping small businesses thrive, still beats out the opposition's argument, but is far less compelling.
- Further positive messaging on regulation erodes the increase in opposition from the engaged debate, dropping it back to its initial level. Support for regulation remains largely unchanged though the mean for support increases, and voters who start out neutral or unsure break our way by nearly 2:1.
- After hearing further messaging in support of greater regulation, the groups that shift most toward supporting greater regulation tend to be 40-49 year olds, Latinos, mothers, women and older voters living in the Midwest, men in the West, and voters in the West South Central region.
 - The profile of the voter who shifts toward favoring greater regulation is married, non-college educated, and living in the West or the South. By narrow margins these voters skew female and are also slightly more likely to be Democratic.
- Those who shift most against greater regulation tend to be older independents and men in the South. Younger voters living in the West become polarized over the course of the debate but many more shift toward supporting than opposing greater regulation of big business and corporations.

Political Context

- While many regulatory agencies garner positive image ratings, voters are far more critical of the jobs these agencies are doing today. The only agencies that draw positive appraisal are OSHA (+8) and the USDA (+4), though only by narrow margins. There is little intensity to these ratings, however, leaving impressions malleable.
- Underpinning the pervasive feeling that government is not on the side of ordinary Americans, over seven-in-ten voters do not trust the federal government to act in their best interests. This lack of faith in government presents an obvious barrier, as perceptions of trust correlate to initial attitudes regarding regulation.
 - Trust in government, which has been depleted for the better part of a decade, has eroded further in the past five years.
 - Focus group findings showed that swing voters largely see government as a flawed vehicle when it comes to regulation, too compromised to police itself or other institutions effectively.
 - Government has become strongly linked to the special interests and politics. The way to overcome much of the anti-government feeling is to include in our messaging the demand for greater regulation of, and accountability in, our politics.
- A majority of voters believes that regulation has increased over the last three years. However, when the question is posed in the context of Obama's tenure, voters are split, with roughly equal numbers saying regulations have increased since he took office and saying regulations have stayed about the same—or even decreased. Democrats, and to a lesser extent independents, shift in support of Obama.
- President Obama is an important rallying figure. Although conventional wisdom would suggest a mention of the President would polarize the issue along partisan lines, instead it results in a statistical tie over the efficacy of regulation. When the debate invokes only a chronological frame, over six-in-ten voters believe regulation has become less effective. Again, Democrats, and to a lesser extent independents—especially independent women, rally to Obama.

Image of Regulations

- Voters' perceptions of government regulation are varied and nuanced. While protection and safety are positive themes, perceived excessiveness and costs are key concerns.
 - Focus groups revealed that key swing groups of voters found the words “regulations”, “protections”, and “safeguards” largely synonymous and used them interchangeably when describing government regulation. The survey data also does not show much difference between “protections” and “safeguards”.
- A majority of voters regards government regulation as one way to protect people from physical harm and prevent bad things from happening before they occur. Nearly half believe regulations protect the most vulnerable among us, though this association loses some resonance when “the vulnerable” are defined specifically as children and seniors. Protecting people from physical harm is the strongest predictor of favoring greater regulation.
 - Voters are much less certain that regulation today protects people from economic harm, ensures oversight of foreign imports, or that it holds big businesses or government accountable. These unforgiving assessments should not be misinterpreted, however, as a desire for less regulation or less enforcement but more as a failure of performance today.
 - In fact, these areas represent areas where appetite for increased regulation is greatest and are a foundational plank of our messaging strategy.
- Given the unceasing attacks on regulation, it is perhaps not surprising that majorities of voters believe it creates red tape (41% very well, 69% well), is too bureaucratic (34%, 64%), hurts small businesses (34%, 60%), is too costly (33%, 66%), and increases the deficit (32% 58%).
 - People are protective of small businesses—they don't buy arguments that say that regulations help level the playing field and fully 50% support less regulation for small businesses.
 - While perceptions of regulation being too costly is an important and emerging criticism that has been taking hold, it does not currently predict to opposition to regulation in the way that hurting small business, being seen as unnecessary, and killing jobs all do. In addition, arguing directly against the too costly attack had limited resonance in the focus groups and even provoked some skepticism and confusion.
 - After indexing economic regulations, the key inhibitor of support is the perception that economic regulations are unnecessary, which recent events have helped counter.
 - After indexing social regulations, the trait driving opposition to greater regulation among them is the perception that they are “too costly”.
- Misgivings aside, voters tend to favor greater regulation on several fronts where they feel ordinary people have been left open to harm—especially economic harm. Concerns over the relationship between lobbyists and politicians register with noticeable intensity.
 - On several fronts, large numbers of voters are content with current levels of regulation, particularly regarding “social regulations” such as the environment, workplaces, and food and drugs produced in the U.S. They tend to believe the environmental and workplace regulations are working better as well.

Messages and Positioning

- Voters make major distinctions between the messages. The most effective messages in favor of greater regulation have remarkable reach and intensity—nearly two-thirds of voters find them convincing, including roughly half who find them very convincing.
 - The best arguments call for true accountability in both the public and private sectors, while tapping into the populist anger surrounding Wall Street and the disappearance of the middle class, and incorporating entities voters would like to see greater regulation of, especially Wall Street and the special interests.
- Less compelling are messages that invoke government’s ability to prevent harm—without acknowledging recent failures, focus on helping small businesses, or use the mortgage crisis as a fulcrum for action.
- Some of the “Messaging Do’s” when it comes to regulation include:
 - Invoking themes of protection from physical harm;
 - Emphasizing the need for accountability on the part of big business and government;
 - Specifying areas for greater regulation and identifying the bad actors—Wall Street, big corporations, oil and gas companies, credit card companies;
 - Utilizing President Obama; and
 - Building on populist anger by recognizing the shortcomings of past regulations and realizing that voters have come to see government as inefficient at best and too tied to politics and the special interests, verging on corrupt at worst.

Targeting

- While we have a foundation of support on which to build, there are ample persuasion targets for greater regulation.
 - The groups that regulation initially performs most strongly among represent base targets and include voters who oppose the Tea Party movement, older Democrats, younger independents, college-educated women, younger women, voters in their forties, unmarried voters, and African Americans.
- Persuadables—defined as voters who neither strongly support nor strongly oppose greater regulation on the initial ballot—represent a fruitful target for our messaging efforts. They are overwhelmingly convinced by messages in support of greater regulation and fully six in ten favor greater regulation on the final ballot.
 - The profile of the persuadable is voter is an older non-college educated woman, more Democratic or independent than Republican, and less likely to be living in the South than voters overall.
- Over a third of voters are initially neutral or unsure on the issue of greater regulation, but shift in favor of it with the right messaging. The profile of this neutral/don't know target is a non-college educated, married woman over the age of 50, who is more likely to be a Democrat and living in the South.

Groups of Interest: Small Business Owners and Employees

- Small business owners and employees also pose a particular challenge when it comes to generating support for greater regulation, though we are able to provoke positive movement among them over the course of the survey. It is important to remember that this group leans Republican by 17 points.
- At the outset, small business owners and employees are split on the issue of increasing regulation (37% favor to 35% oppose with 28% saying neutral or don't know). The mean support for greater regulation among small business owners and employees reflects both their neutrality and division (mean 5.0). By the final ballot, a 44% plurality supports greater regulation compared to 36% who are opposed (mean of 5.3).
- Although small business employees and owners are net-positive toward the job that OSHA is doing, they rate all other regulatory agencies net-negatively, as they do the President (36% excellent/good, 63% just fair/poor).
- Small business owners and employees are also disproportionately likely to say that they are worried about overregulation (61% strongly, 70% overall). This fear likely leads to their support for no additional regulations and enforcement (59% strongly, 64% overall).
- The most negative associations with small business owners and employees revolve around red tape (53% very well, 75% well), bureaucracy (51% very well, 74% well), and perceived harm to small businesses (51% very well, 73% well).
- The messages that most move these voters emphasize the need for accountability, putting people first, and building back the disappearing middle class.

Groups of Interest: Tea Party Supporters

- The profile of a Tea Party supporter is a white, non-college educated man over the age of 50, who is married but without children under the age of 18, identifies himself as a strong Republican, and lives in the South.
- Tea Party supporters assign negative ratings to all the regulatory agencies tested, and are especially critical of President Obama (91% just fair/poor, 7% excellent/good).
 - This is largely expected given that nearly nine-in-ten Tea Party supporters (89%) think that government acts in their best interest only some of the time or almost never.
- Tea Party supporters are among the groups most likely to believe that we do not need any additional regulations, and that we simply need to enforce the laws on the books (68% strongly, 72% overall). Tea Party supporters—especially men who support the Tea Party movement—are also disproportionately concerned with overregulation of business, and are one of the few groups where the framing of business as “big business and corporations” intensifies, rather than mollifies, these concerns (80% strongly worry about too much regulation of business and 85% strongly worry about too much regulation of “big business and corporations”).
- For all these reasons, Tea Party supporters are not particularly fruitful targets to pursue. In fact, further positive messaging regarding regulation only intensifies Tea Party supporters’ opposition to regulation.
 - At the outset, opposition to greater regulation of big business and corporations outpaces support by a margin of 2:1 (42% oppose to 22% favor), with nearly a quarter strongly opposed.
 - On the final ballot, a solid majority opposes greater regulation (54% to 19%), with over a third of Tea Party supporters strongly opposed.
 - Of the roughly one-fifth of Tea Party supporters who favor greater regulation, support is stronger among women than men.
- The messages that most move Tea Party supporters emphasize the need for accountability and putting people first for a change. They also respond to increased regulation of government officials and products, goods, and services imported to the U.S., reflecting their anti-government and more nationalistic values. Less than a majority (42%) were for more regulation of Wall Street and financial institutions.

The Political Context

Voters enter the regulatory debate with conflicting viewpoints. They consider regulation necessary, have some positive associations with the concept, and can even identify specific regulatory successes. At the same time, however, they believe there are too many regulations today, are critical of the job that regulatory agencies are doing, and tend to think that regulations have become less effective in recent years. The public's desire for more effective regulation is counterbalanced by a pervasive sense that the government and "politics" is not on the side of ordinary Americans, and more often is used as a tool of a powerful and connected elite to complicate, rather than ameliorate, their lives.

Positive impressions of government regulation revolve around protection and security.

“Protecting the people especially in food and drugs. You want to know what is in that if you have to take it to live.”

-Blue-collar Southfield man

“We wouldn't need any government regulations if everybody was nice and honest and did the right thing all the time but that just isn't the world we live in. Someone has or something has to moderate that and that is the job of regulation.”

-Richmond man and small business owner

“They help stop some of the monopolies. One would be the telephone company...You can't have too many monopolies.”

-Blue-collar Southfield woman

“[They] Keep companies from taking advantage.”

-Blue-collar Southfield man

- The swing voters in the focus groups saw regulations as necessary, given the lack of security in today's world and government's basic responsibility to safeguard its citizens from harm.
- Focus group participants described regulations as—ideally—protecting people against dangers they are unable to detect on their own.
- To a lesser extent, they thought regulations, when enforced, had the ability to level the playing field and check the ability of powerful actors to take advantage of ordinary people.

Negative impressions of government regulation are around small business, the economy, and general anti-government sentiment.

“Imbalances with other nations that don't have regulation. That's where all the jobs tend to go because it is cheaper, obviously, so they end up in countries that don't care if their workers get hurt or they poison wherever they are. They just make their money and go to the next place. Very cynical but it's pretty close to the truth.”

-Blue-collar Southfield man

“It's like a knee-jerk reaction—just pass all these rules to fix the problem and then it just creates this quagmire of rules which don't do anything but cause people problems.”

-College-educated Richmond woman

“I think it is pretty clear that regulations resulted in a lot of jobs going overseas.”

-Richmond man and small business owner

“You just don't have freedom when you have regulations.”

-Blue-collar Southfield woman

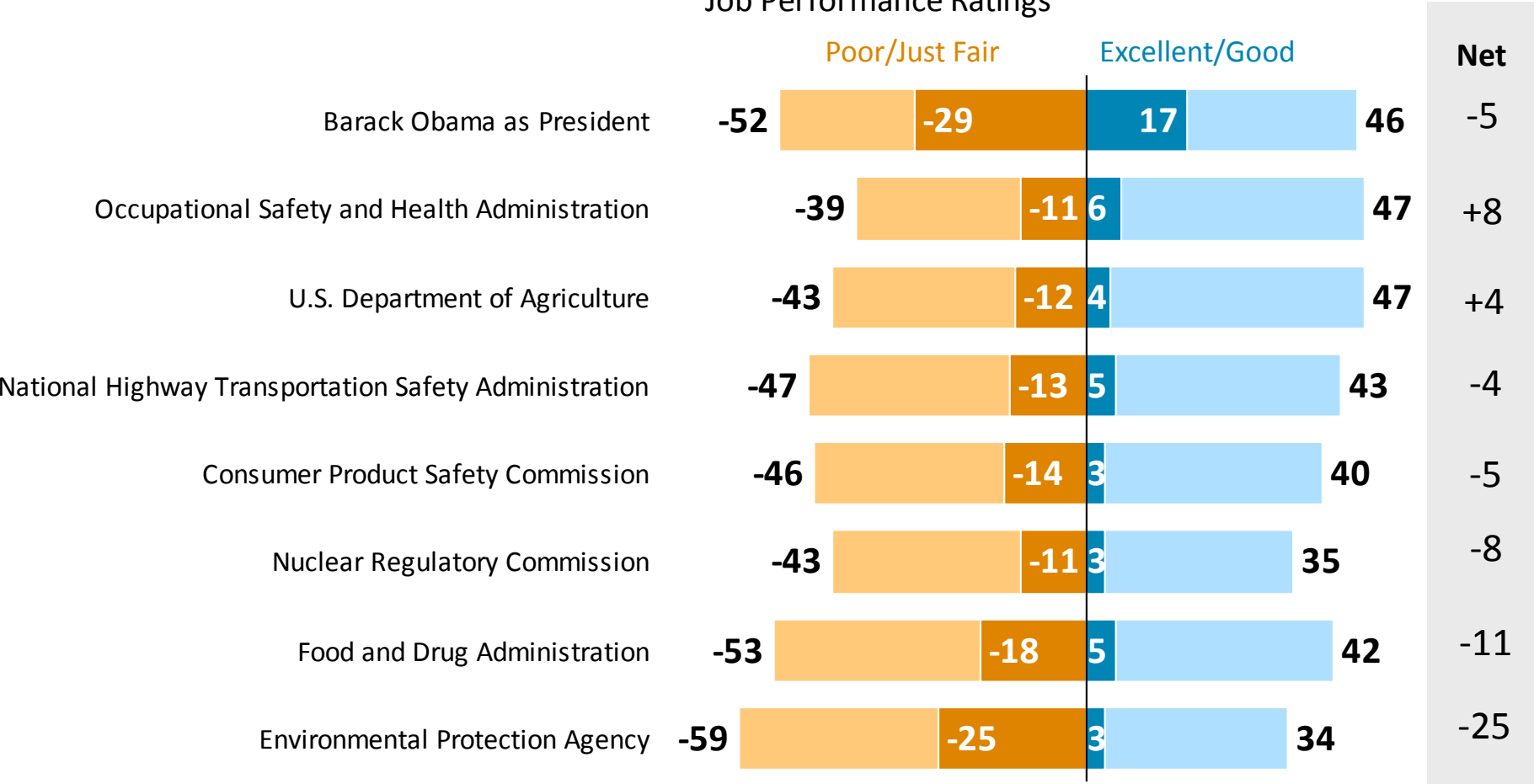
“Some of these government regulations... were nonsensical.”

-Blue-collar Southfield man

- At the same time, focus group participants tended to view regulations as unnecessarily limiting entrepreneurship. Some went as far to say that regulations impinged upon the deeply held American value of freedom, though this was not a common perspective.
- Mostly, focus group participants worried about the impact of undue regulations on the economy and jobs.
- They chafed at assertions that the government cares about them or is looking out for their best interests; antipathy toward government and especially politics is certainly not a new phenomenon, but the intensity of voters' lack of faith was intense.
- Focus group participants also questioned the efficacy of regulations, and believe that while their intent may be good (not a universal conclusion), regulations often tended to cause more problems than they solved.

While many regulatory agencies garner positive image ratings, voters are far more critical of the jobs these agencies are doing today. The only agencies that draw positive appraisal are OSHA and the USDA, though only by narrow margins. There is little intensity to these ratings, however, leaving impressions malleable.

Job Performance Ratings

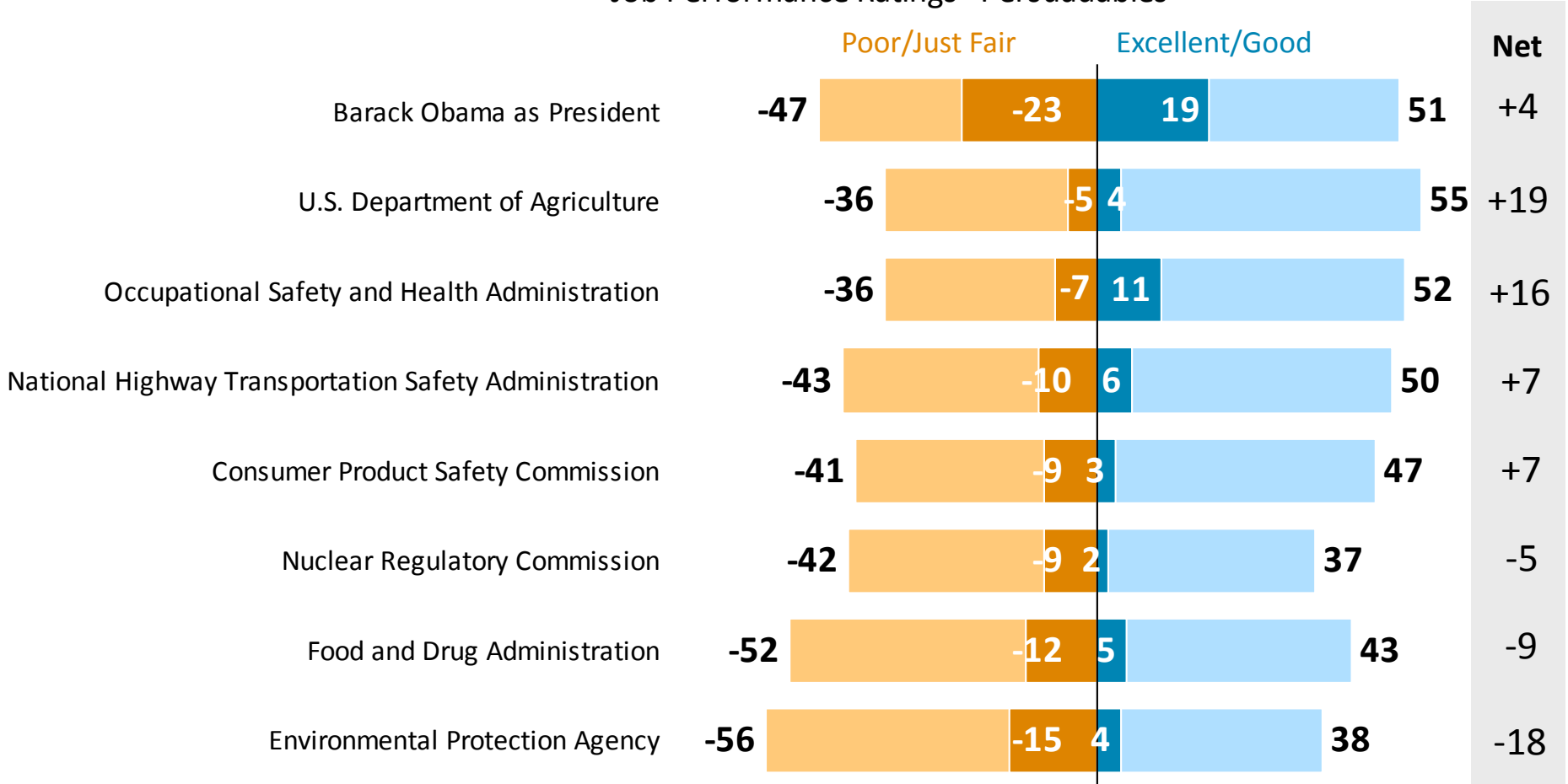


Darker colors used to indicate intensity.

For each one of the following, please tell me if you think that person, institution, or organization is doing an excellent, good, just fair, or poor job:

Persuadable voters—defined as those who neither strongly favor nor strongly oppose greater regulation of big business but who are very moved by three or more pro-regulation arguments—are more charitable in their assessments of regulatory agencies (and the President), with the exceptions of the FDA, EPA, and Nuclear Regulatory Commission.

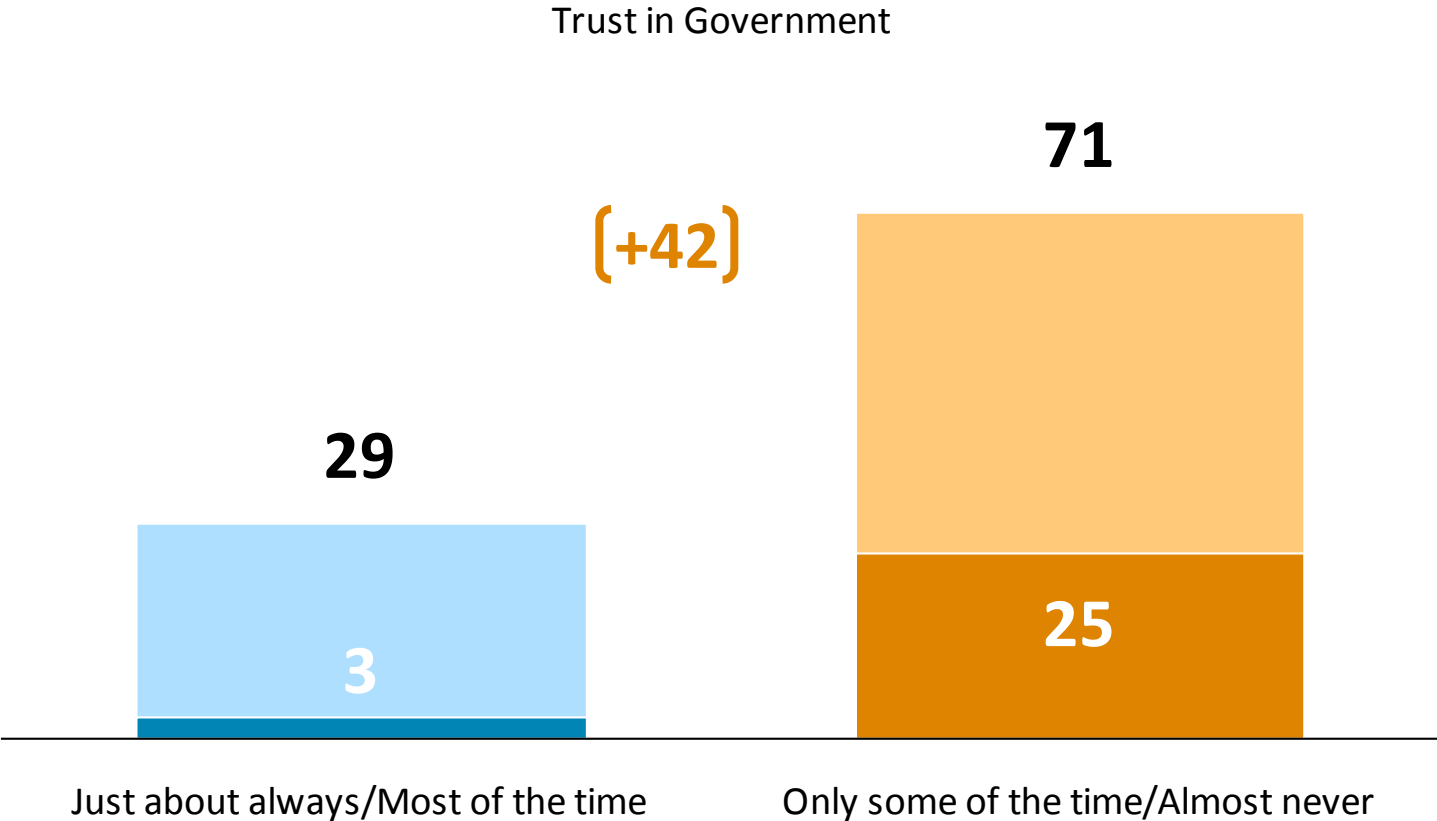
Job Performance Ratings--Persuadables



Darker colors used to indicate intensity.

For each one of the following, please tell me if you think that person, institution, or organization is doing an excellent, good, just fair, or poor job:

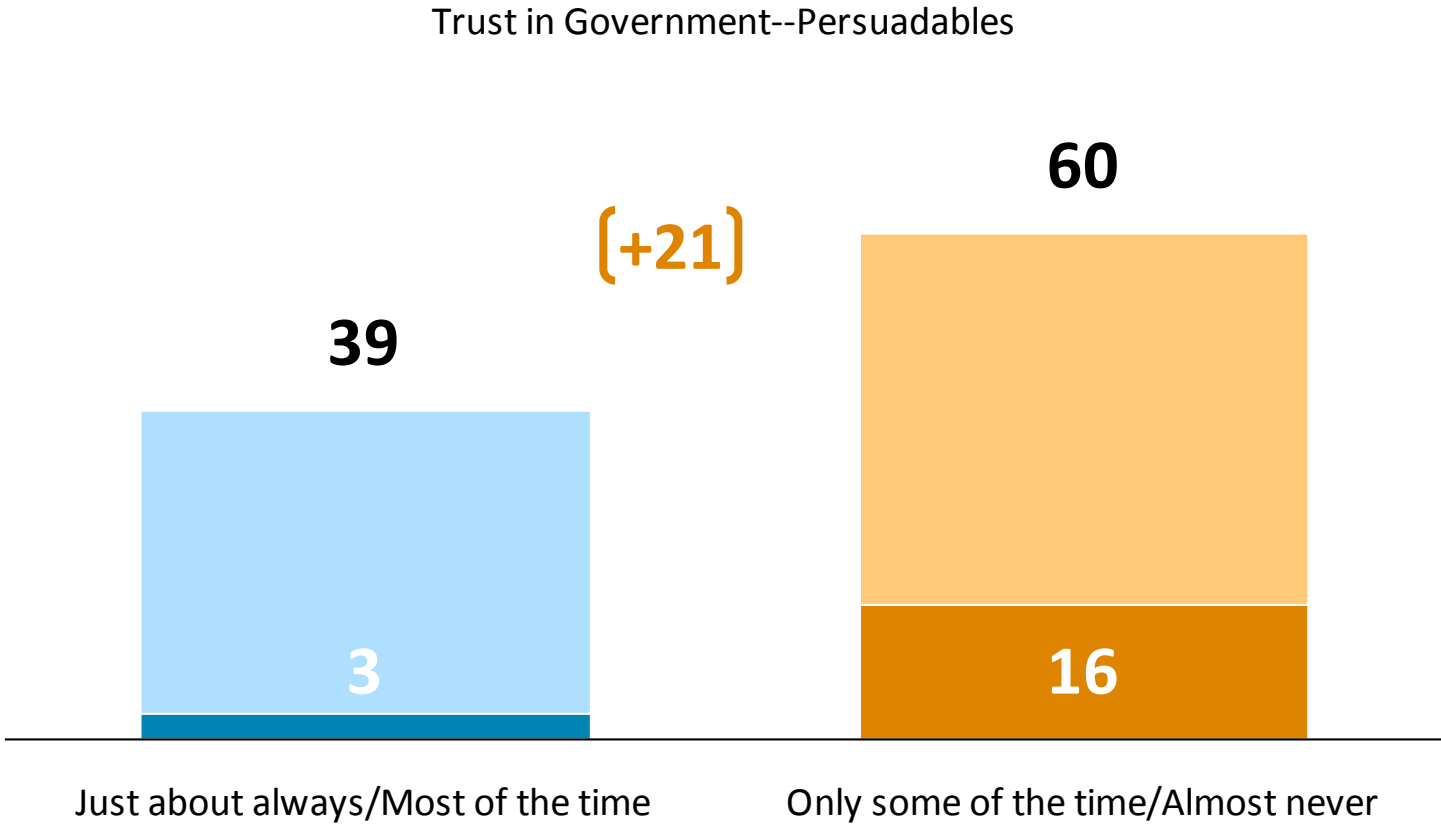
Underpinning the pervasive feeling that government is not on the side of ordinary Americans, over seven-in-ten voters do not trust the federal government to act in their best interests. This lack of faith in government presents an obvious barrier, as perceptions of trust correlate to initial attitudes regarding regulation.



Darker colors used to indicate intensity.

How much of the time do you think you can trust the government in Washington to do what is right – just about always, most of the time, only some of the time, or almost never?

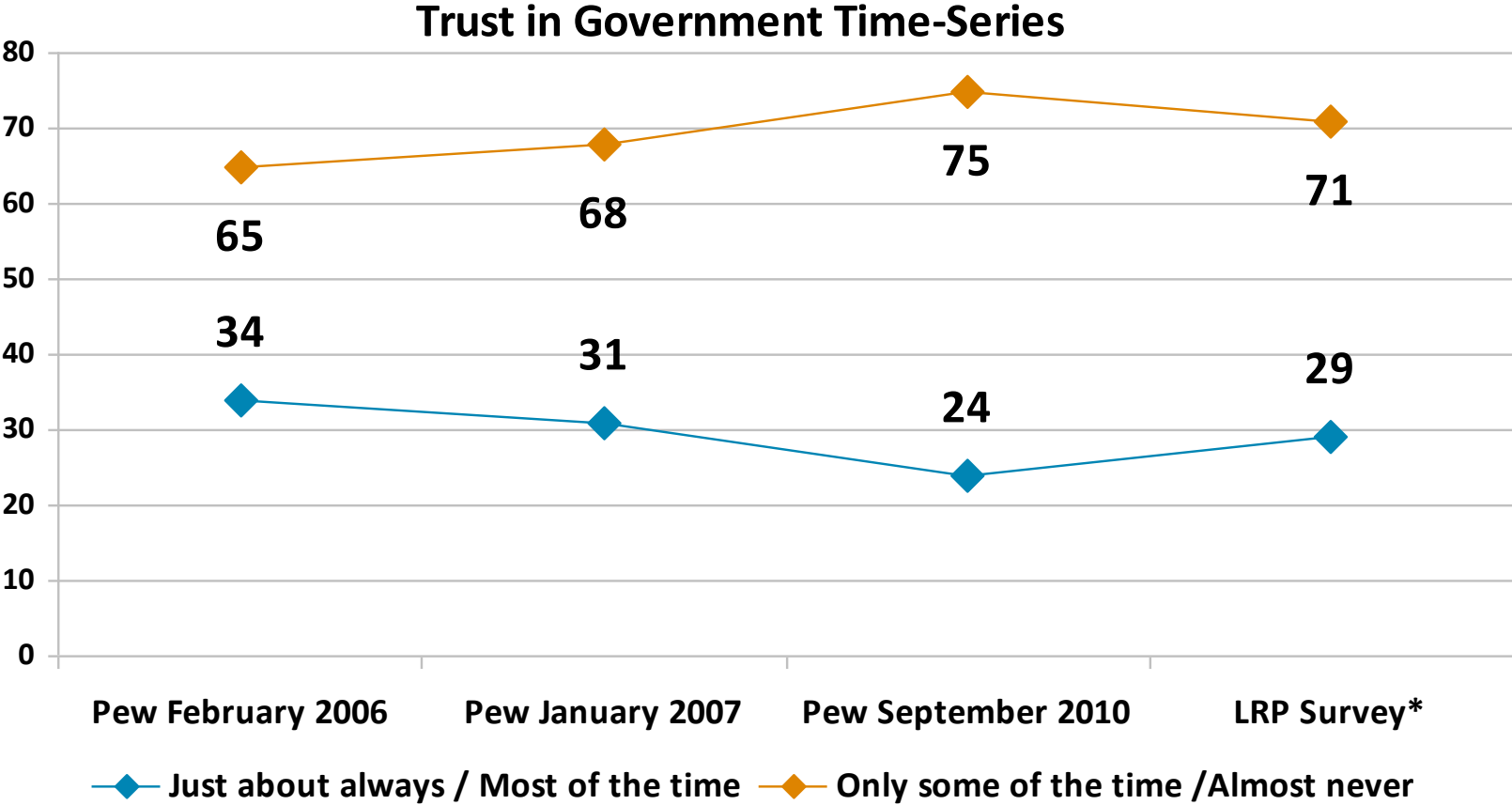
Persuadable voters are slightly more mixed in their trust of government to act in the interest of the people, though a majority remains doubtful.



Darker colors used to indicate intensity.

How much of the time do you think you can trust the government in Washington to do what is right – just about always, most of the time, only some of the time, or almost never?

Trust in government, which has been depleted for the better part of a decade, has eroded further in the past five years.



*It should be noted that while the LRP survey was conducted among likely voters, the Pew surveys were conducted of a national adult sample.

How much of the time do you think you can trust the government in Washington to do what is right – just about always, most of the time, only some of the time, or almost never?

Swing voters largely see government—with its ties to politics—as a flawed vehicle when it comes to regulation—too compromised to police itself or other institutions effectively.

“We just don't trust the government.”

-Richmond man and small business owner

“Democrats, Republicans....They need to get off their high horses and take a look and see what is really going on in the country and work together.”

-Blue-collar Southfield woman

“I'm discouraged and don't have confidence in the people who are making our laws. I think they need to get in the trenches with small business owners like us to see what it is really like.”

-Richmond woman and small business owner

“The government doesn't know the meaning of being efficient. It doesn't even approach it. It just doesn't care about that because the money comes from somewhere. It is almost like they think there is a magical money tree.”

-Richmond man and small business owner

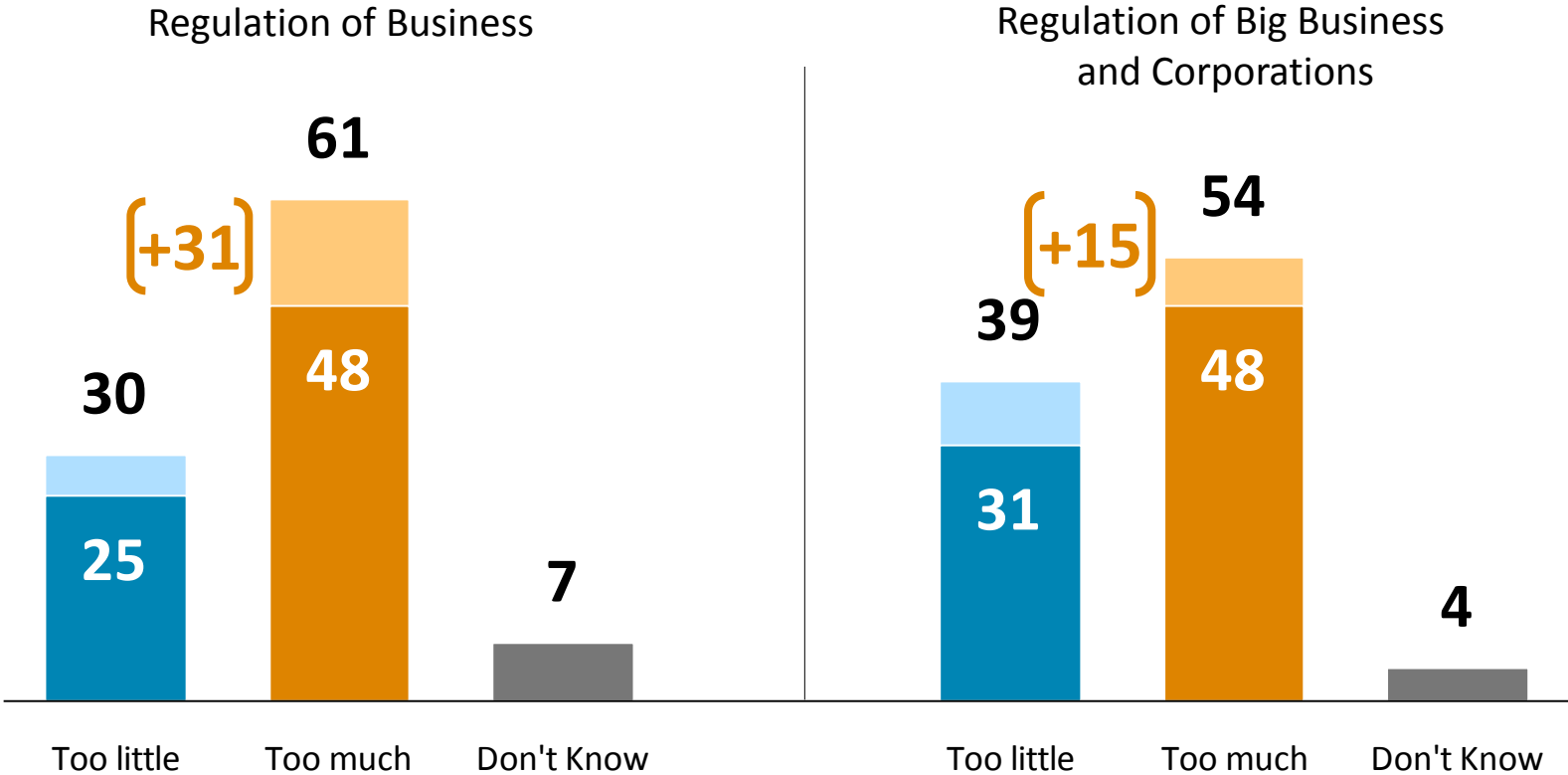
“They are not looking at what is best for the people...They want their way and this way and they're not going to give and come to a compromise or the best decision for everybody.”

-Blue-collar Southfield woman

- Voters believe that those inside the beltway are out of touch when it comes to the economic challenges facing Americans.
- Swing groups are disenchanted by both parties—they're not looking for a party label so much as they are looking for leadership and a prescription for the economy and jobs.
- Small business owners especially believe that government is unfamiliar with the obstacles they face, including many of the attributes that they believe are absent from government—efficiency and fiscal responsibility.

While over-regulation of “business” is by far a more pressing concern than under-regulation, when the question is framed along the lines of regulating “big business and corporations”, the margin separating voters’ worries over excessive regulation is cut in half.

Amount of Regulation Worries

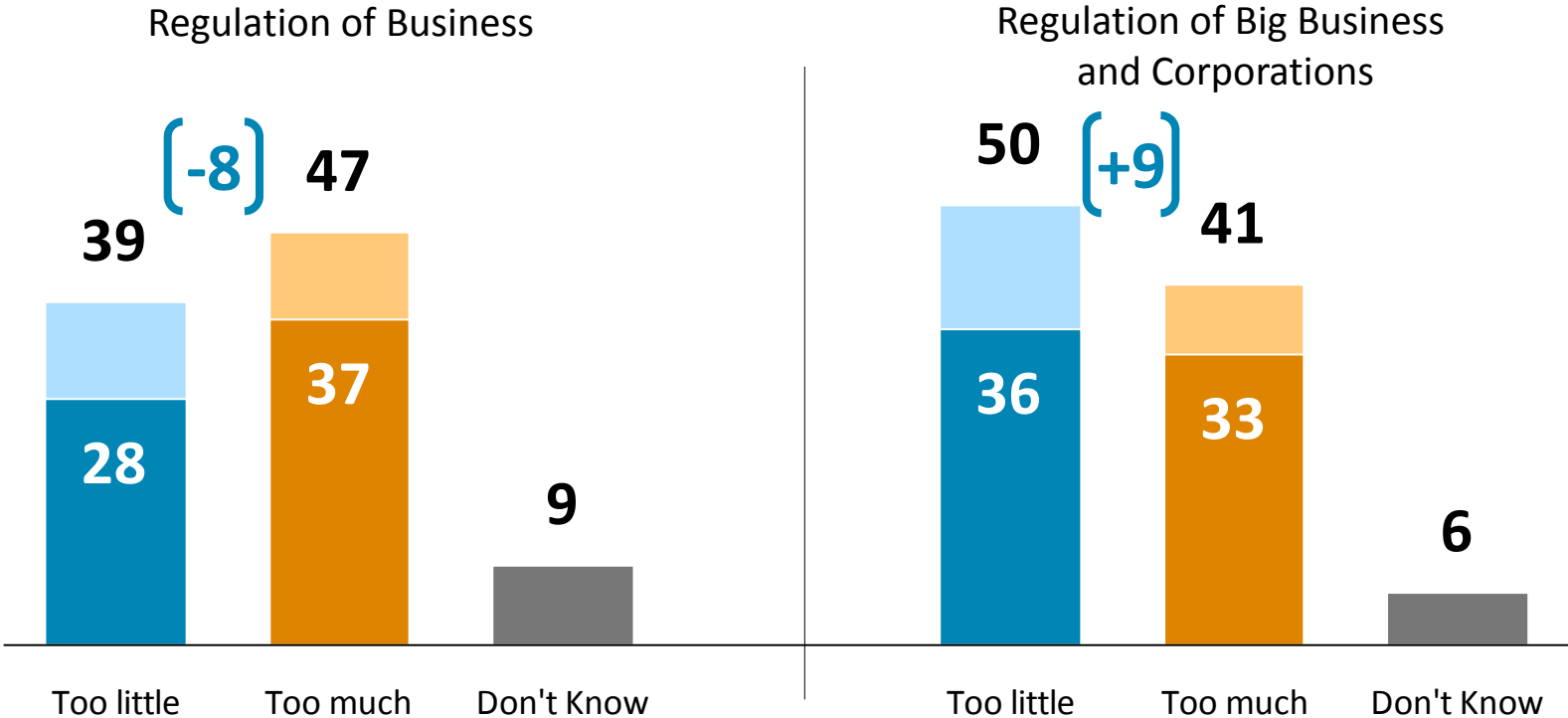


Darker colors used to indicate intensity.

And which of the following worries you more: [ROTATE TWO STATEMENTS] _Too much government regulation of business [big business and corporations]. OR _Too little government regulation of business. [IF STATEMENT] And do you feel that way strongly or not-so strongly?

Framing the debate around regulation of “big business and corporations” switches the views of persuadable voters. In these terms, fears of under-regulation outweigh fears of over-regulation by a solid margin.

Amount of Regulation Worries--Persuadables



Darker colors used to indicate intensity.

And which of the following worries you more: [ROTATE TWO STATEMENTS] _Too much government regulation of business [big business and corporations]. OR _Too little government regulation of business. [IF STATEMENT] And do you feel that way strongly or not-so strongly?

Regulation of “big business and corporations” is a more advantageous framework than “business” alone. The drop in concerns about overregulation between these two frameworks is most pronounced among voters living in the Northeast, younger college-educated voters and college-educated women, independents and weak Democrats, singles, and unmarried women.

Net Swings Between Net Too Much Regulation of “Business” And Net Too Much Regulation of “Big Business And Corporations”:

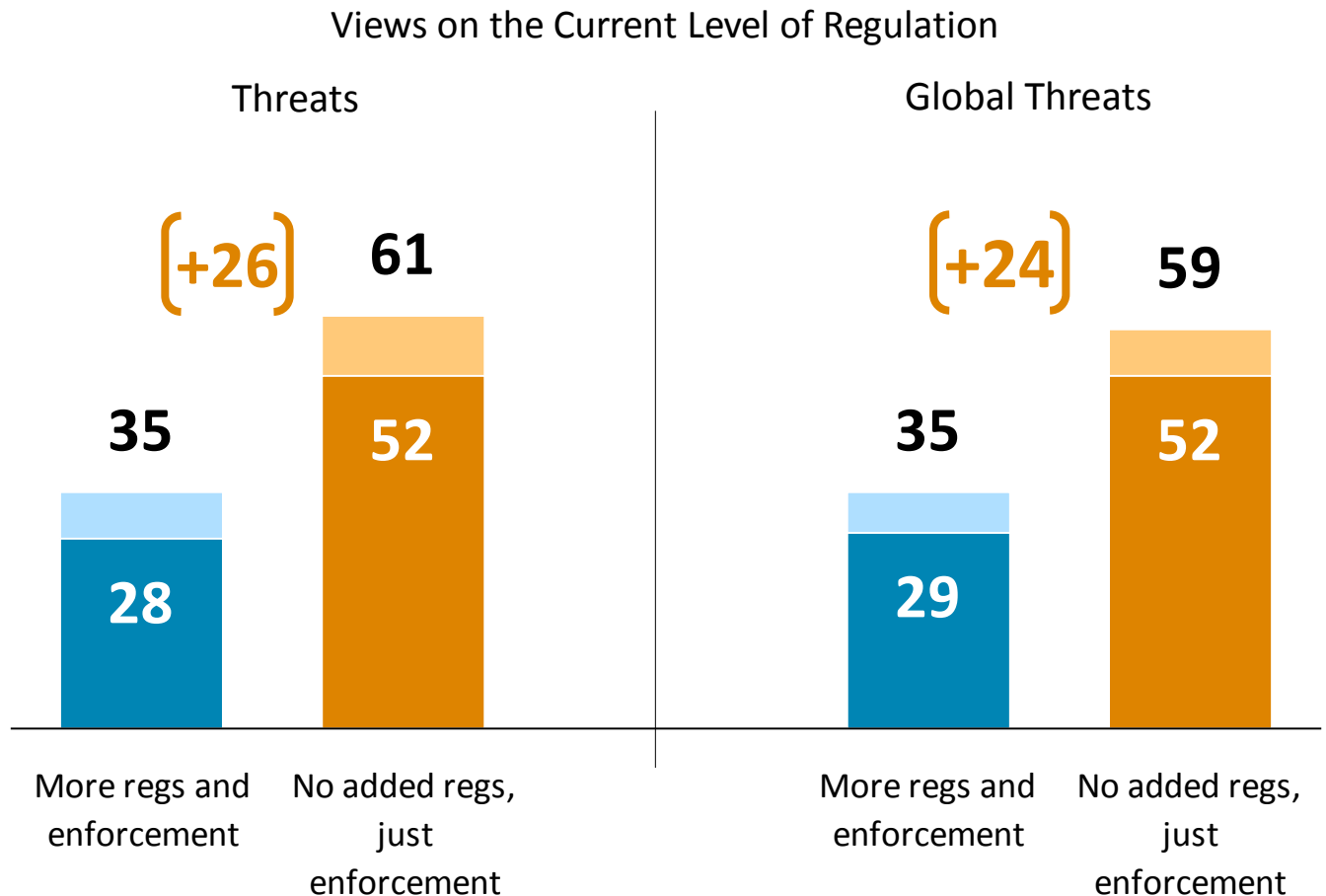
- Northeast – +19 to -11 (30-point swing)
- College <50 – +25 to -5 (30-point swing)
- Independents and weak Democrats – +21 to -5 (26-point swing)
- Singles – +24 to -1 (25-point swing)
- College women – +23 to -2 (25-point swing)
- Unmarried women – +9 to -5 (14-point swing)

Roughly six-in-ten voters favor enforcement of the regulations on the books rather than additional regulations. There is little difference in attitudes when the growing threat to Americans is framed in global terms.

I'm going to read you two statements about regulation. Please tell me which one comes closer to your point of view:

Statement A: We need additional regulations to protect Americans from the growing and often unknown number of [global] threats and ensure that these regulations are enforced.

Statement B: There are already too many regulations. We don't need more regulations, we simply need to enforce what's on the books.



Darker colors used to represent intensity.

Democrats, Tea Party opponents, fathers, and groups of younger voters represent some of the strongest supporters of increased regulation and enforcement.

**More Regulations and Enforce
% Strongly (% Overall) – 28% (35%):**

- Strong Democrats – 43% (54%)
- Men who oppose the Tea Party – 42% (54%)
- Democrats <50 – 42% (50%)
- Democratic men – 41% (51%)
- Democrats – 40% (50%)
- Oppose the Tea Party – 39% (49%)
- African Americans – 37% (44%)
- Fathers – 36% (42%)
- Northeast <50 – 36% (42%)
- West women – 35% (47%)
- H.S./Less – 35% (42%)
- Middle Atlantic region* – 34% (43%)
- Northeast women – 34% (42%)
- 40-49 – 34% (36%)

Republicans, Tea Party supporters, small business owners and employees, and many subgroups of men and older voters constitute some of the strongest supporters of enforcing existing regulations without adding new regulations.

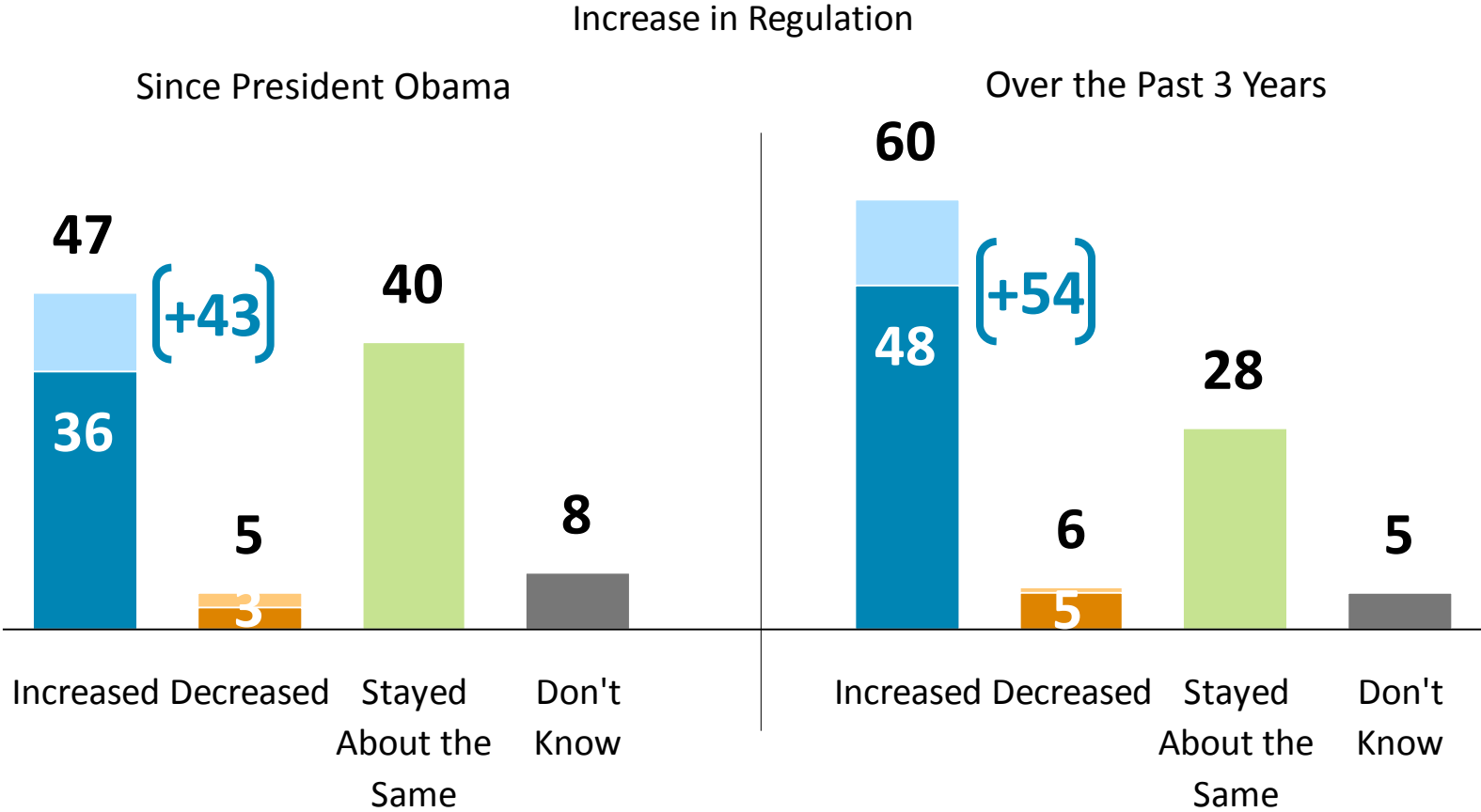
**No Added Regulations, Just Enforce
% Strongly (% Overall) – 52% (60%):**

- Republican 50+ – 75% (81%)
- Support the Tea Party – 68% (72%)
- Republicans – 65% (72%)
- West South Central region* – 63% (76%)
- Men who neither support nor oppose the Tea Party – 63% (71%)
- Post H.S. – 62% (69%)
- Men 50+ – 62% (67%)
- Midwest 50+ – 61% (66%)
- Independents w/leans 50+ – 61% (64%)
- Married men – 60% (65%)
- Midwest men – 59% (68%)
- South 50+ – 59% (67%)
- Non-college 50+ – 59% (65%)
- Small business owners and employees – 59% (64%)
- College men – 59% (64%)
- West North Central region* – 59% (64%)

*West South Central region is defined as Arkansas, Louisiana, Oklahoma, or Texas.

*West North Central region is defined as Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, or South Dakota.

A majority of voters believes that regulation has increased over the last three years. However, when the question is posed in the context of Obama’s tenure, voters are split, with roughly equal numbers saying regulations have increased since he took office and saying regulations have stayed about the same—or even decreased. Democrats, and to a lesser extent independents—especially independent women, shift in support of Obama.

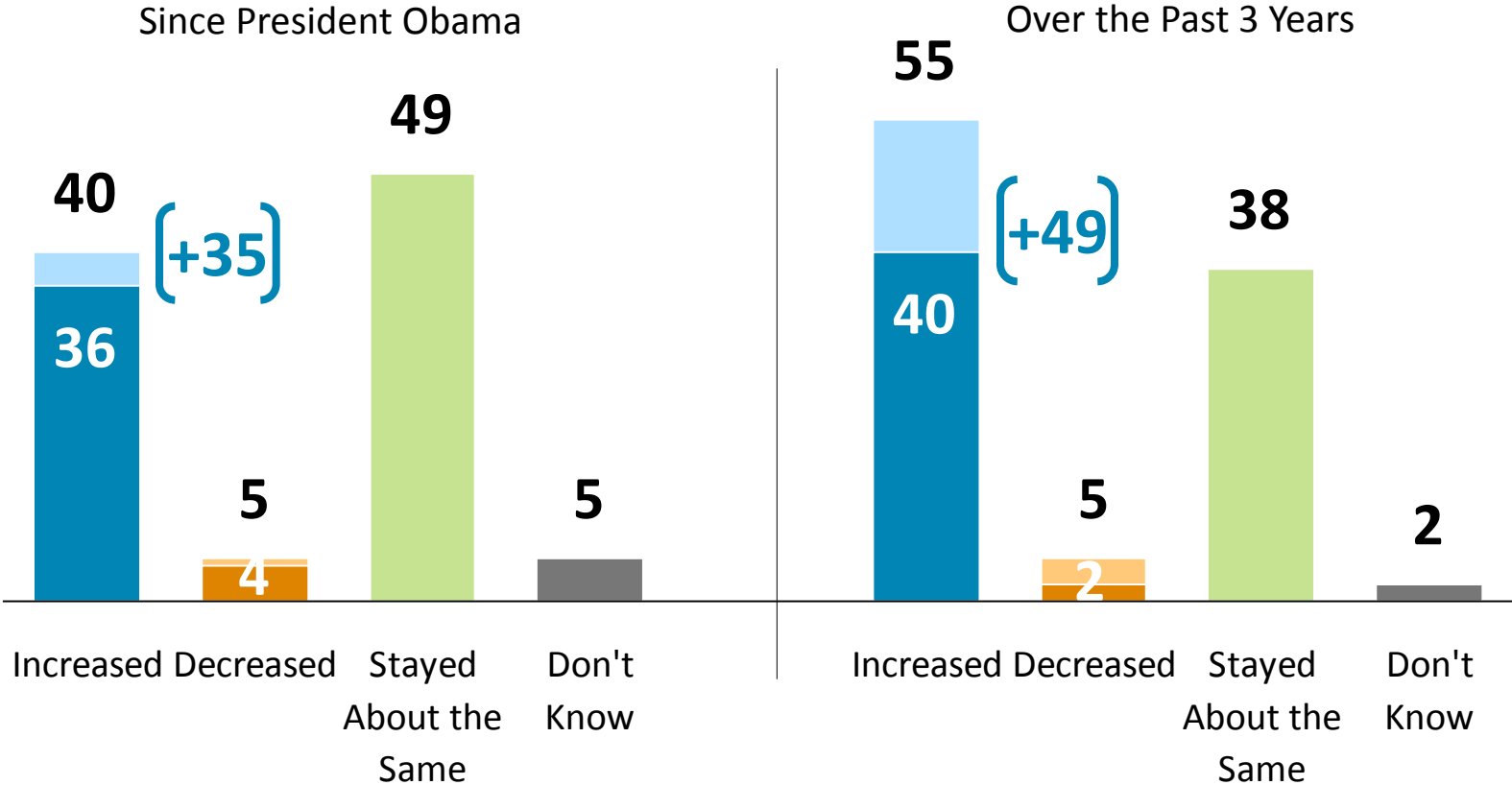


Darker colors used to indicate intensity.

Regardless of how you feel about the current number of regulations, do you think the amount of regulations has increased, decreased, or stayed about the same since President Obama took office [over the last three years]? [IF INCREASED/DECREASED] And do you feel that way strongly, or not-so strongly?

A plurality of persuadable voters believes that regulations have stayed about the same under Obama. However, when provided with only a chronological frame, a solid majority believes that regulations have increased over the last three years.

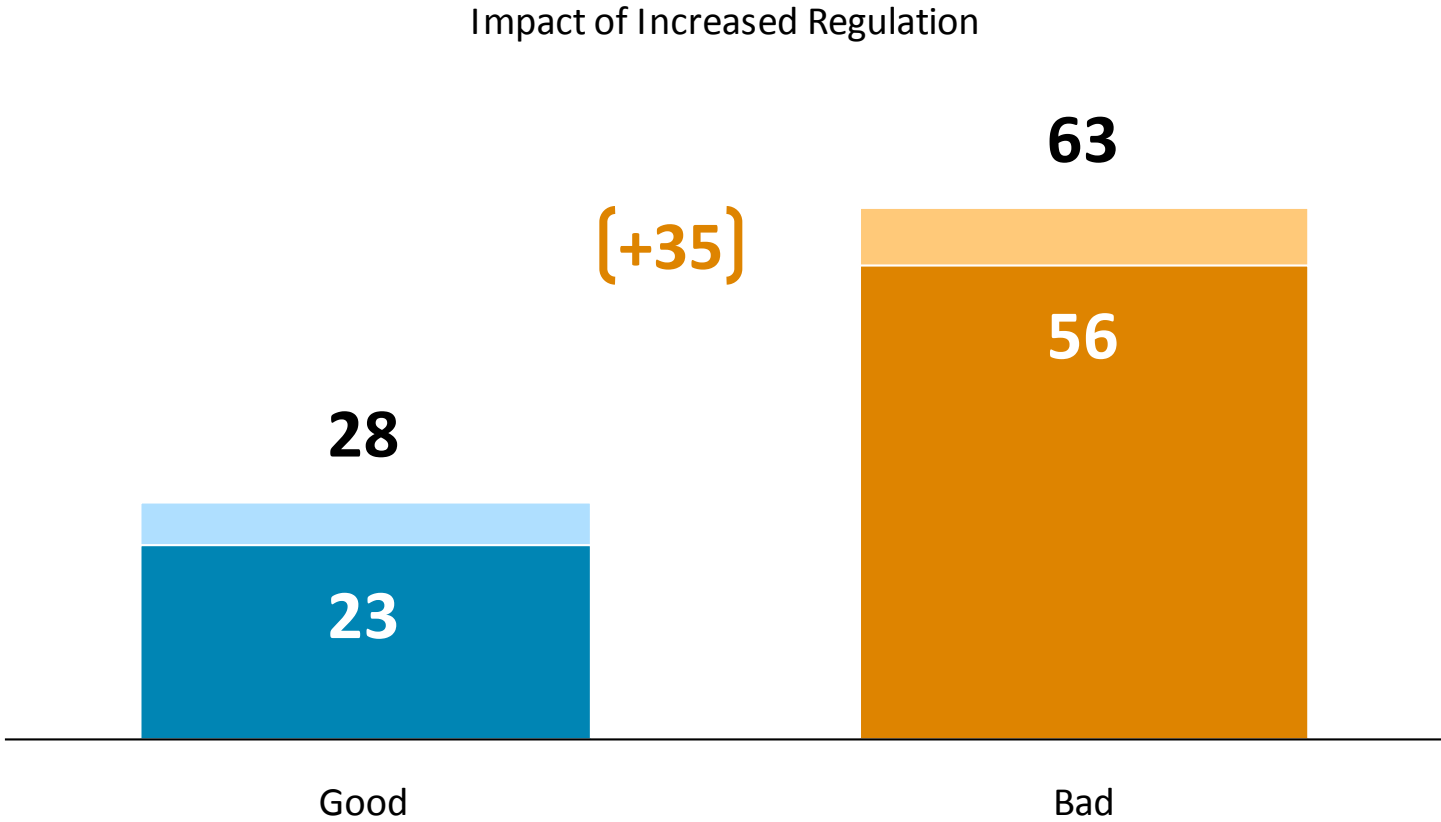
Increase in Regulation--Persuadables



Darker colors used to indicate intensity.

Regardless of how you feel about the current number of regulations, do you think the amount of regulations has increased, decreased, or stayed about the same since President Obama took office [over the last three years]? [IF INCREASED/DECREASED] And do you feel that way strongly, or not-so strongly?

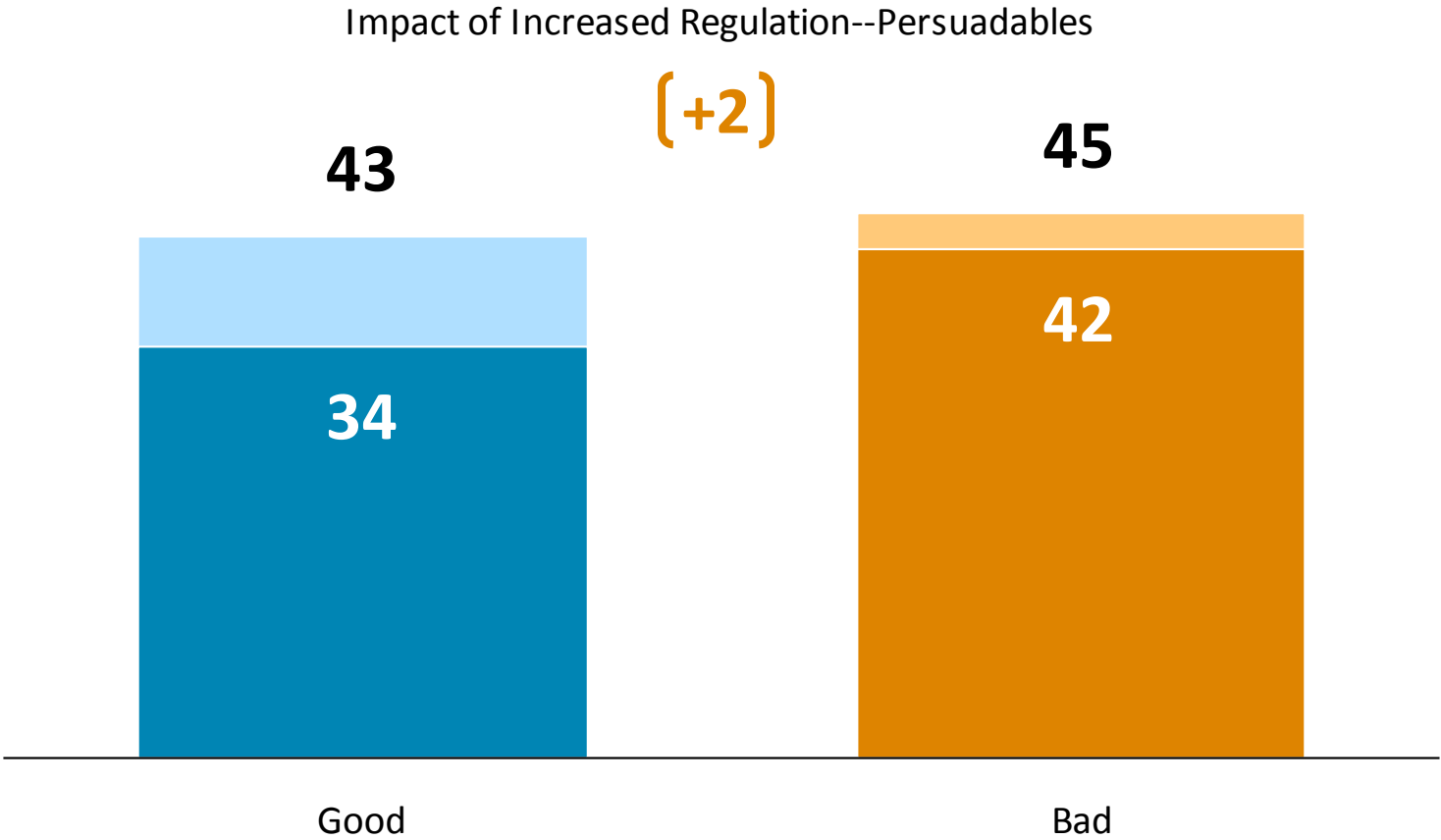
A strong majority of voters who believe that regulations have been on the rise believes that this has been a bad development with real intensity. Just over one-quarter see this in positive terms.



Darker colors used to indicate intensity.

And do you think that increased regulation is a good thing or a bad thing? [IF GOOD/BAD] And do you feel that way strongly, or not-so strongly?

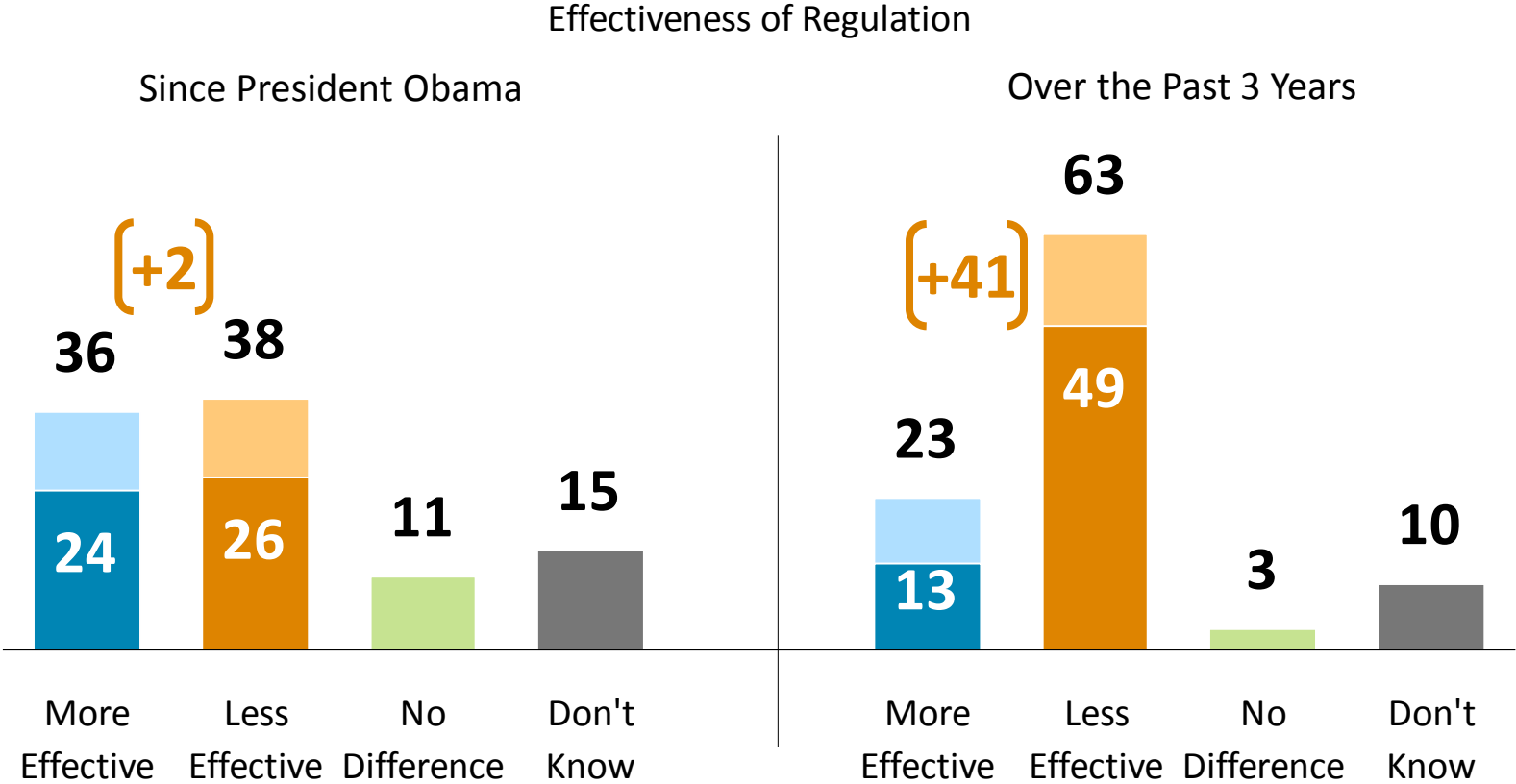
Persuadable voters are much more divided on whether the perceived increase in regulations has been a good or bad thing, though there is greater intensity behind those who see it in a negative light.



Darker colors used to indicate intensity.

And do you think that increased regulation is a good thing or a bad thing? [IF GOOD/BAD] And do you feel that way strongly, or not-so strongly?

President Obama is an important rallying figure. Although conventional wisdom would suggest a mention of the President would polarize the issue along partisan lines, instead it results in a statistical tie over the efficacy of regulation. When the debate invokes only a chronological frame, over six-in-ten voters believe regulation has become less effective. Again, Democrats, and to a lesser extent independents—especially independent women, rally to Obama.



Darker colors used to indicate intensity.

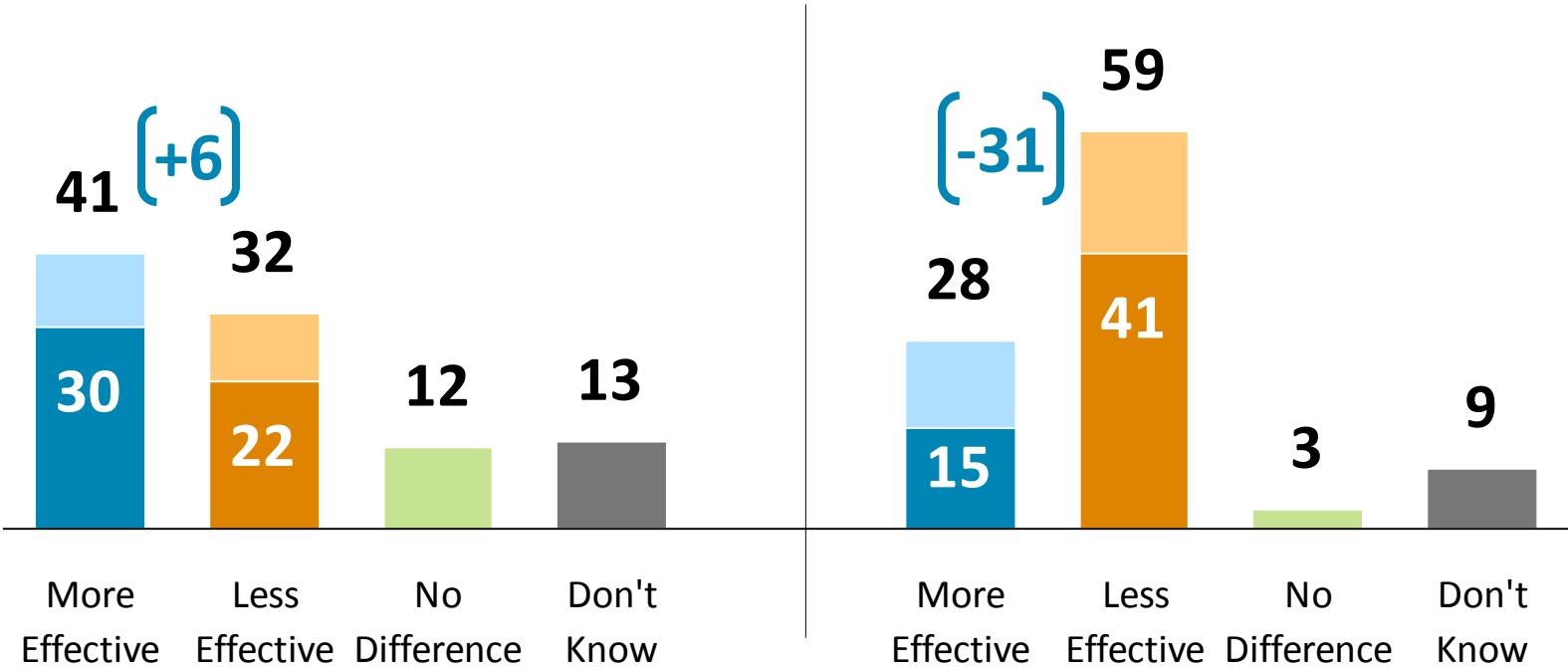
And since President Obama took office [And over the last three years,] do you think that regulations have become more or less effective? [IF MORE/ LESS] And do you feel that way strongly, or not-so strongly?

This “Obama dynamic” is even more pronounced among persuadable voters, a plurality of whom believes that regulation under President Obama has become more effective.

Effectiveness of Regulation--Persuadables

Since President Obama

Over the Past 3 Years



Darker colors used to indicate intensity.

And since President Obama took office [And over the last three years,] do you think that regulations have become more or less effective? [IF MORE/ LESS] And do you feel that way strongly, or not-so strongly?

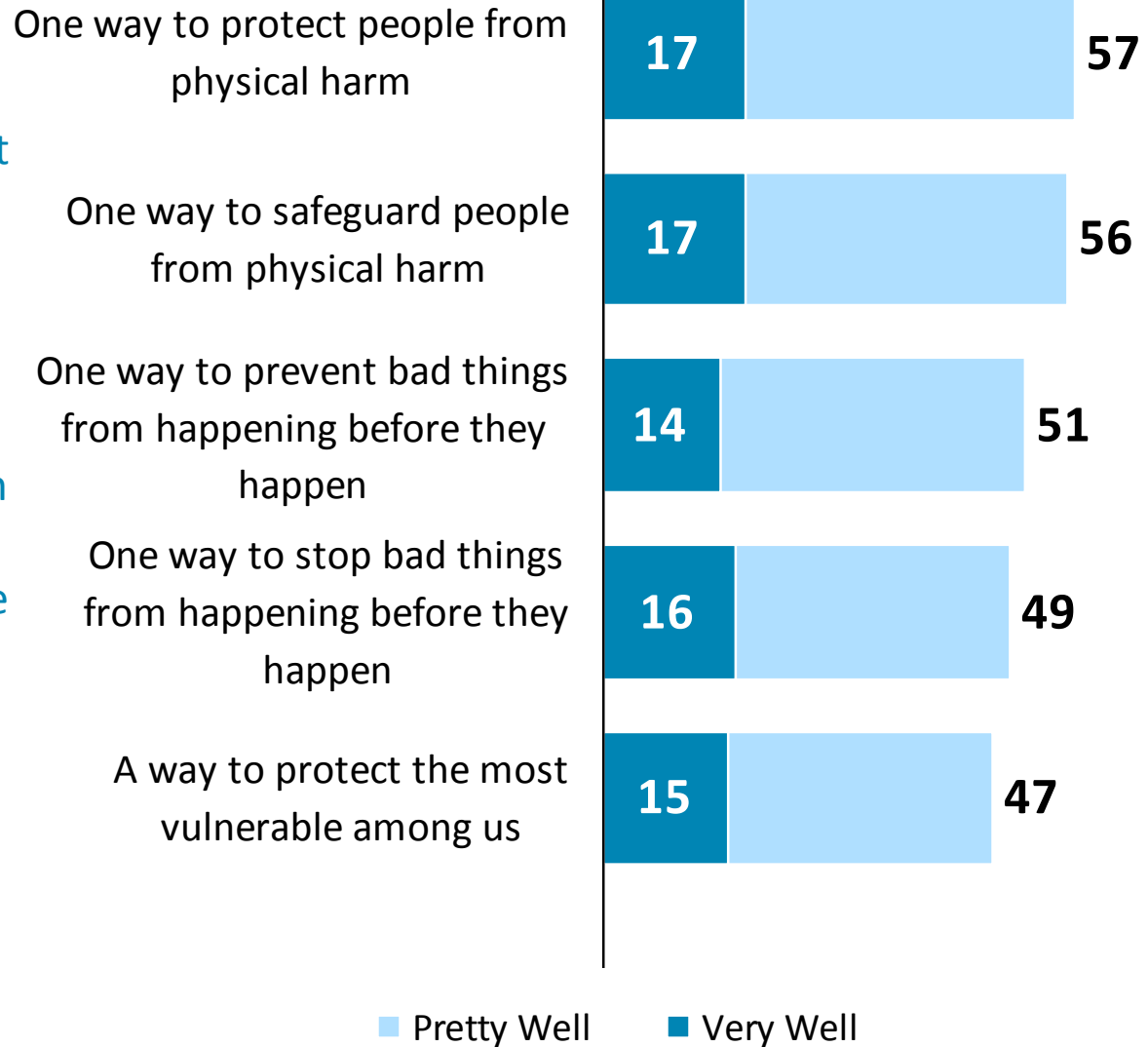
There are significant shifts in opinion when voters are asked to think about regulation since President Obama took office—swings equaling 70 points among Democratic men, 52 points among Democratic women, and 61 points among independent women.

| Effectiveness of Regulation (% More - % Less) | Democratic men | Democratic women | Independent w/leans men | Independent w/leans women |
|--|-------------------|---------------------|-------------------------------|---------------------------------|
| With President Obama | 57 – 20 | 60 – 19 | 34 – 43 | 36 – 34 |
| Without President Obama | 26 – 59 | 36 – 48 | 20 – 58 | 16 – 75 |

| Effectiveness of Regulation (% More - % Less) | Republican men | Republican women | Tea Party supporters |
|--|----------------|---------------------|-------------------------|
| With President Obama | 29 – 57 | 14 – 62 | 21 – 59 |
| Without President Obama | 16 – 69 | 14 – 79 | 10 – 79 |

Government Regulation Positive Traits

A majority of voters regards government regulation as one way to protect people from physical harm and prevent bad things from happening before they occur. Nearly half believe regulations protect the most vulnerable among us, though this association loses some resonance when “the vulnerable” are defined specifically as children and seniors. Protecting people from physical harm is the strongest predictor of favoring greater regulation.



Net

19

17

8

7

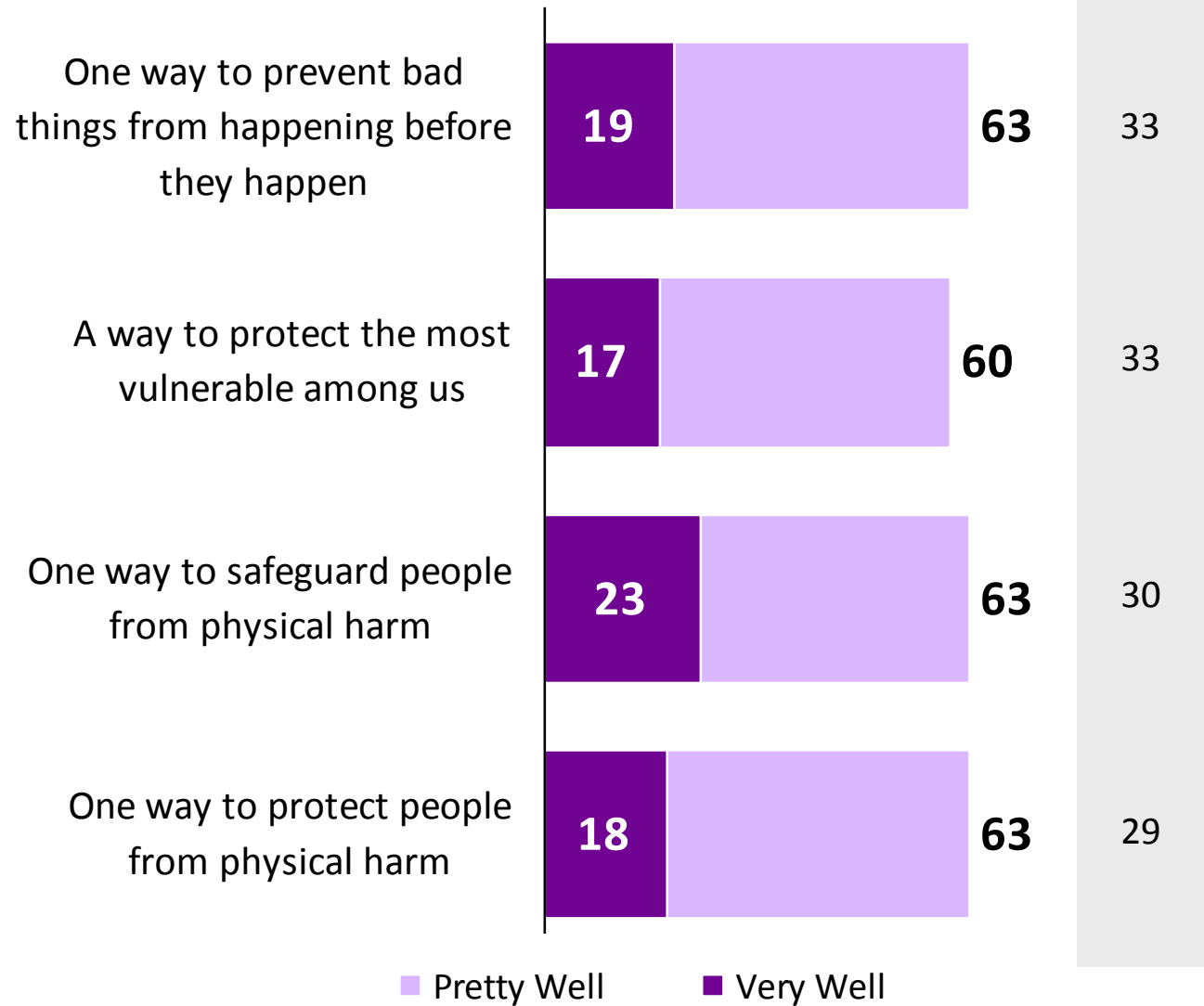
6

■ Pretty Well

■ Very Well

Many of the electorate's associations with "government regulation" are even stronger among persuadable voters, in particular safeguarding people from harm, protecting the most vulnerable, and preventing bad things from happening. Protecting the most vulnerable—in broad, unspecified terms—is predictive of the shift toward favoring greater regulation over the course of the survey, and works better than children and seniors.

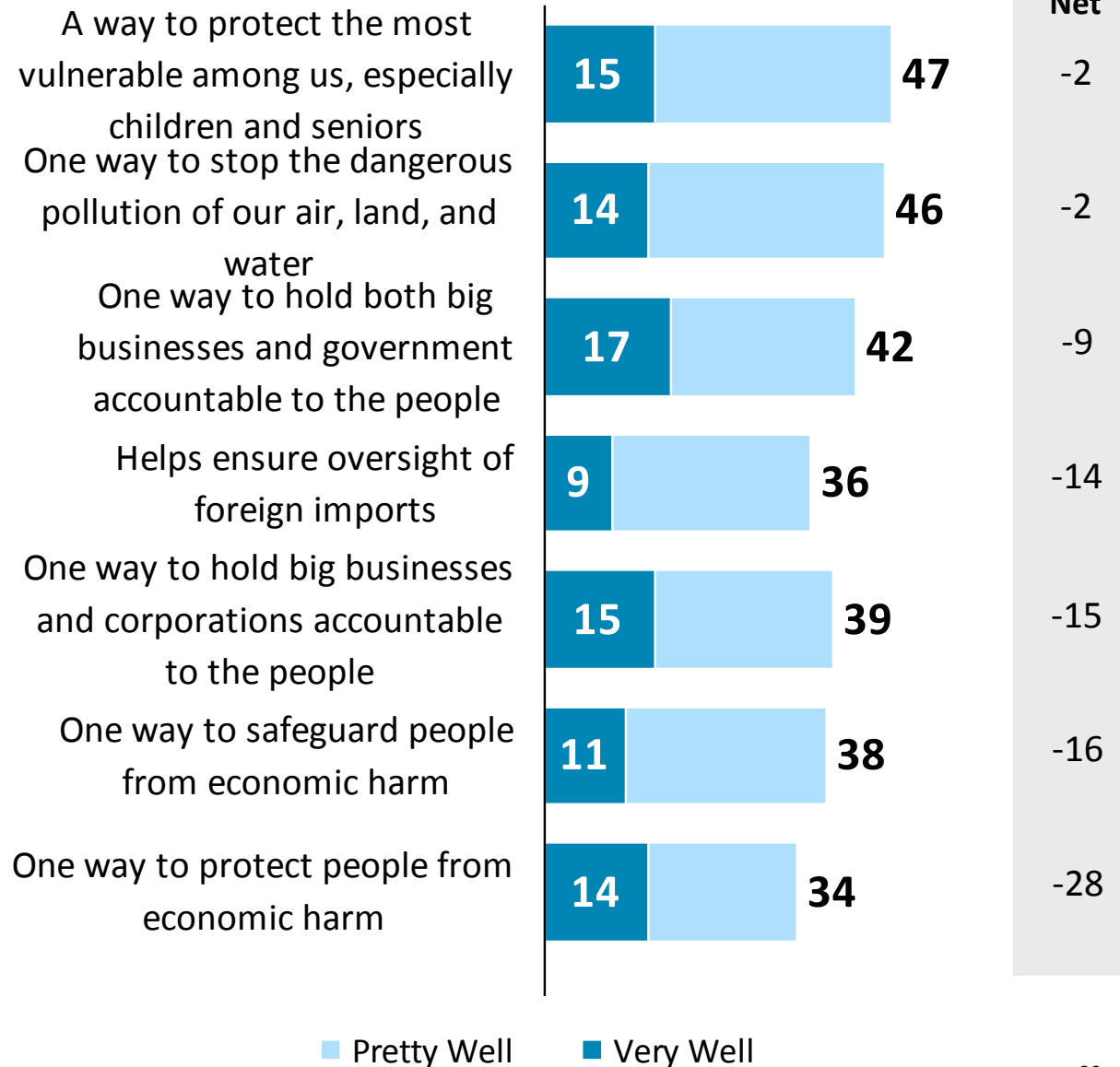
Government Regulation Positive Traits--Top Tier--
Persuadables



Now, I am going to read you some words and phrases that have been associated with government regulation. Please tell me how well you think each describes government regulation: VERY well, PRETTY well, NOT too well, or not well AT ALL. If you don't know how well a word or phrase describes government regulation, just say so and we'll go on.

Voters are much less certain that regulation today protects people from economic harm, ensures oversight of foreign imports, or that it holds big businesses or government accountable. These unforgiving assessments should not be misinterpreted, however, as a desire for less regulation or less enforcement but more as a failure of performance today.

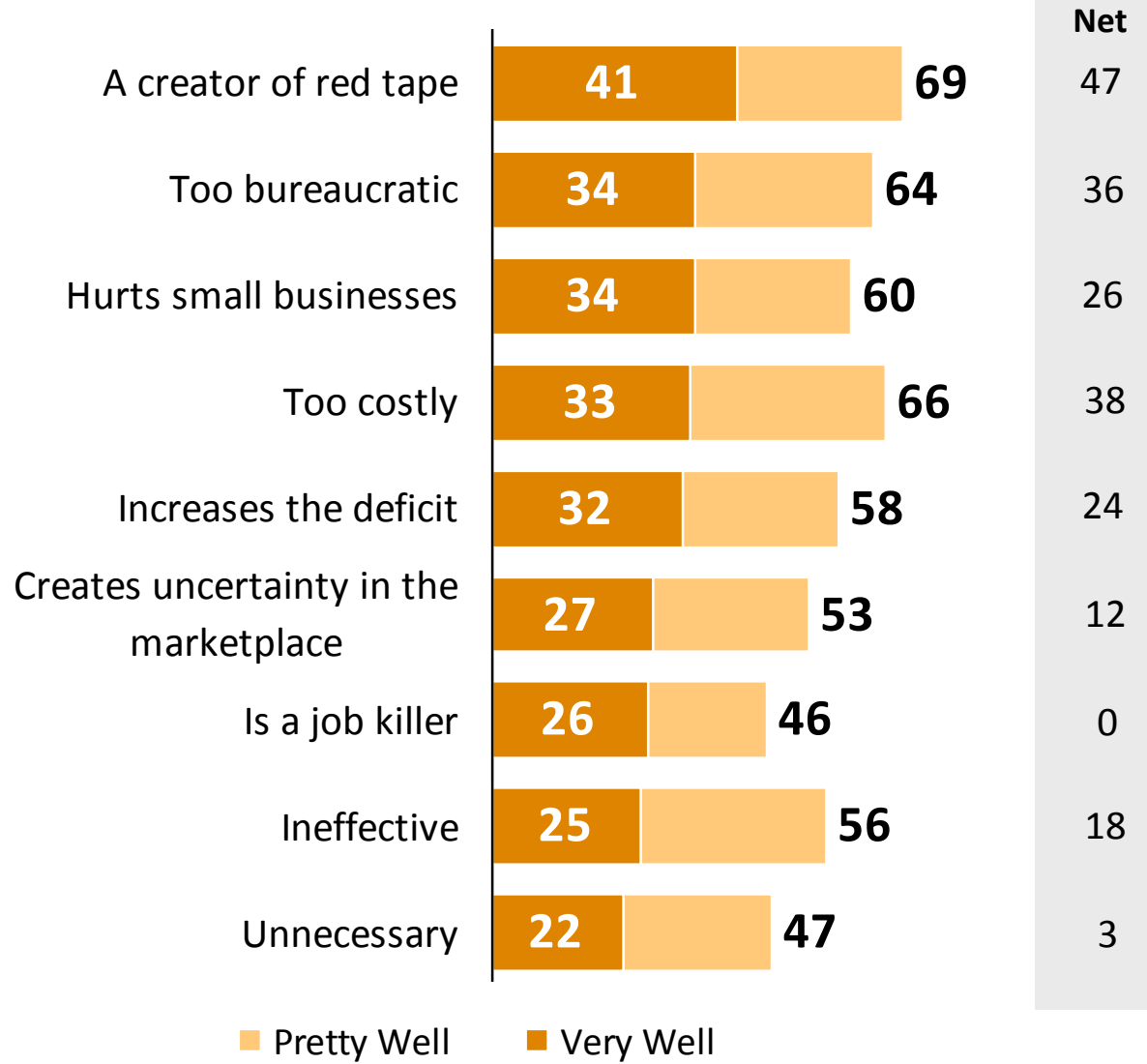
Government Regulation Positive Traits



Now, I am going to read you some words and phrases that have been associated with government regulation. Please tell me how well you think each describes government regulation: VERY well, PRETTY well, NOT too well, or not well AT ALL. If you don't know how well a word or phrase describes government regulation, just say so and we'll go on.

Given the relentless attacks on regulation, it is perhaps not surprising that majorities of voters believe it creates red tape, is too bureaucratic, is too costly, hurts small businesses, increases the deficit, and causes uncertainty in the marketplace. While perceptions of regulation being too costly is an important and emerging criticism that is taking hold, it does not currently predict to opposition to regulation in the way that hurting small business, being seen as unnecessary, and killing jobs all do. In addition, arguing directly against the too costly attack had limited resonance in the focus groups and even provoked some skepticism and confusion.

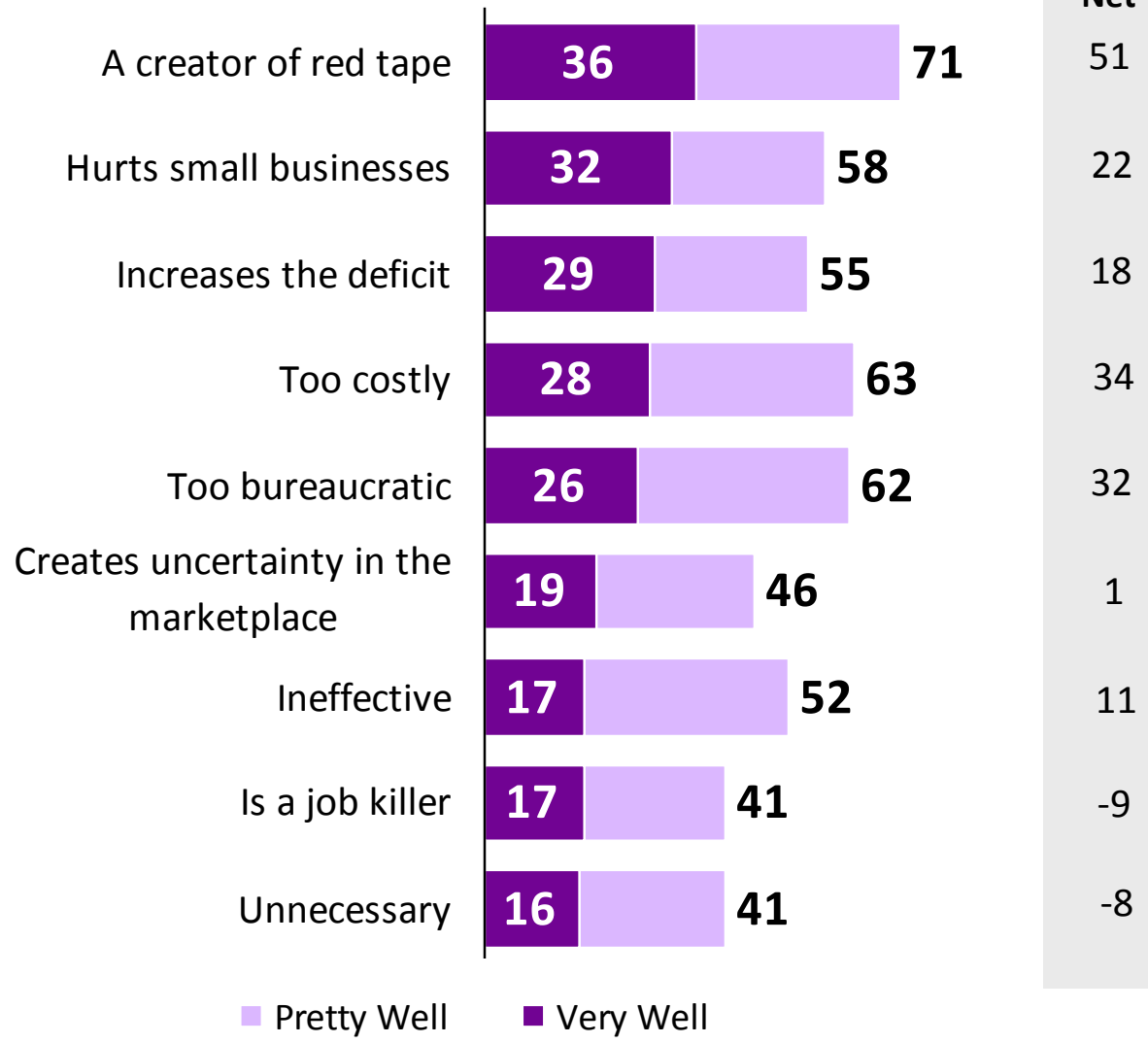
Government Regulation Negative Traits



Now, I am going to read you some words and phrases that have been associated with government regulation. Please tell me how well you think each describes government regulation: VERY well, PRETTY well, NOT too well, or not well AT ALL. If you don't know how well a word or phrase describes government regulation, just say so and we'll go on.

Among persuadable voters, the intensity behind negative associations with government regulation is generally softer, though many believe that it hurts small businesses. Persuadable voters push back more forcefully against descriptions of regulation as “a job killer” and “unnecessary”. The former is a coup, as “is a job killer” is a correlate to opposition.

Government Regulation Negative Traits--
Persuadables



Now, I am going to read you some words and phrases that have been associated with government regulation. Please tell me how well you think each describes government regulation: VERY well, PRETTY well, NOT too well, or not well AT ALL. If you don't know how well a word or phrase describes government regulation, just say so and we'll go on.

While the perception that regulations are too costly is not dominant, nor does it predict as strongly to opposition to regulation as other criticisms, it is nevertheless significant and troubling in the context of the public's economic anxiety and cost-sensitivity. The challenge is underscored by voters' disinclination to believe that cost estimates are often excessive.

"Do you mean the actual cost of it is more than what they said it would be?"

-Richmond man and small business owner

"When has that ever happened before?"

-College-educated Richmond woman

"But are they going high on purpose to give them [selves] leeway?"

-Blue-collar Southfield woman

"I'm sure that is the case sometimes. Just the law of averages. You can't always be getting screwed."

-Richmond man and small business owner

"There are some instances where I'm sure it does happen that way, but I guess it is hard to believe."

-College-educated Richmond woman

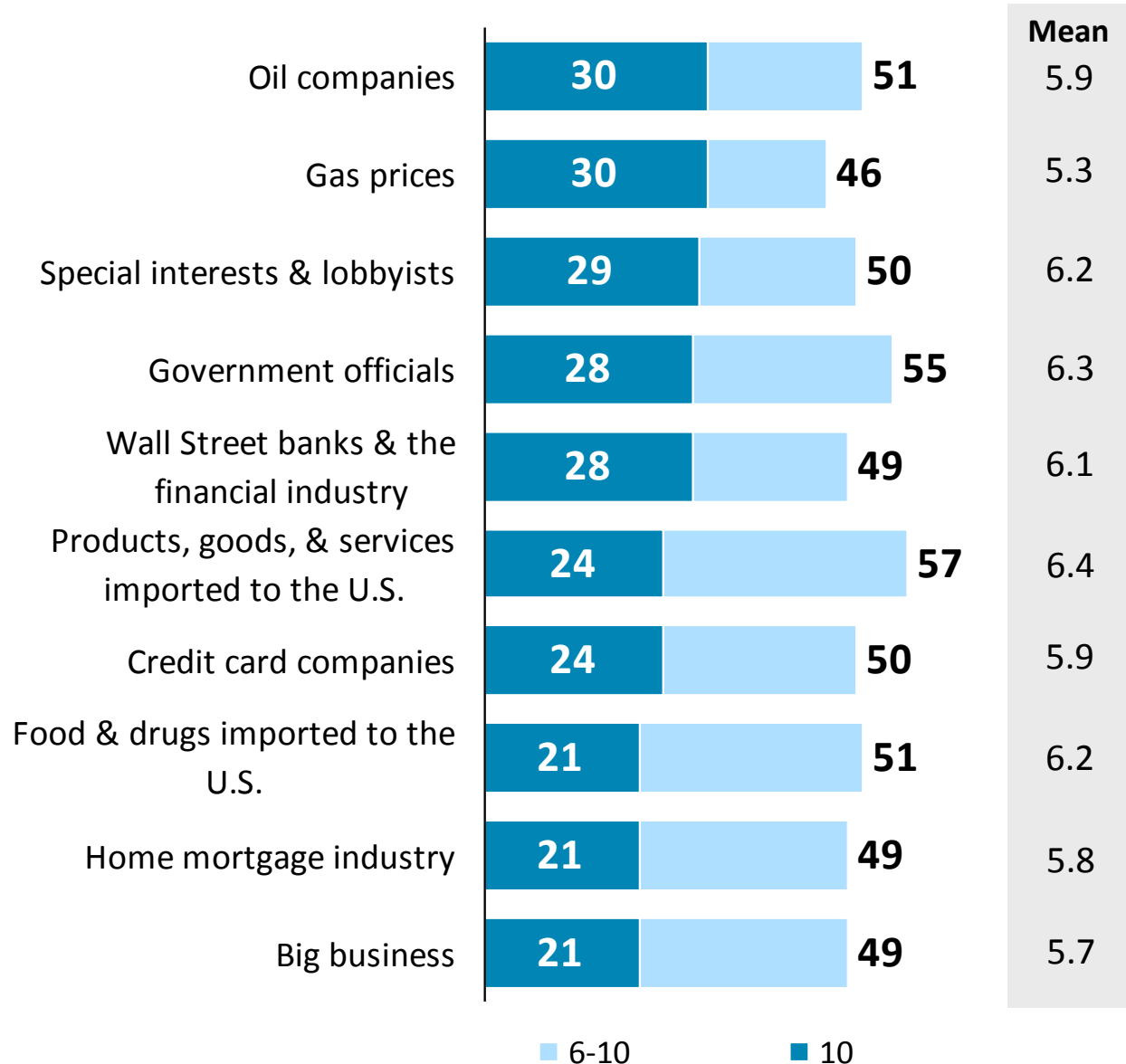
"Who is estimating? Government?"

-Richmond man and small business owner

- Given participants' lack of trust in government and their sour views on the economy, it is not surprising that they tended to reject assertions that regulations frequently cost less than estimated.
- In fact many focus group participants needed repeated clarification from the moderator, and even afterward remained skeptical.
- Those willing to accept the statement were more likely to believe that any cost savings were an anomaly rather than the norm.

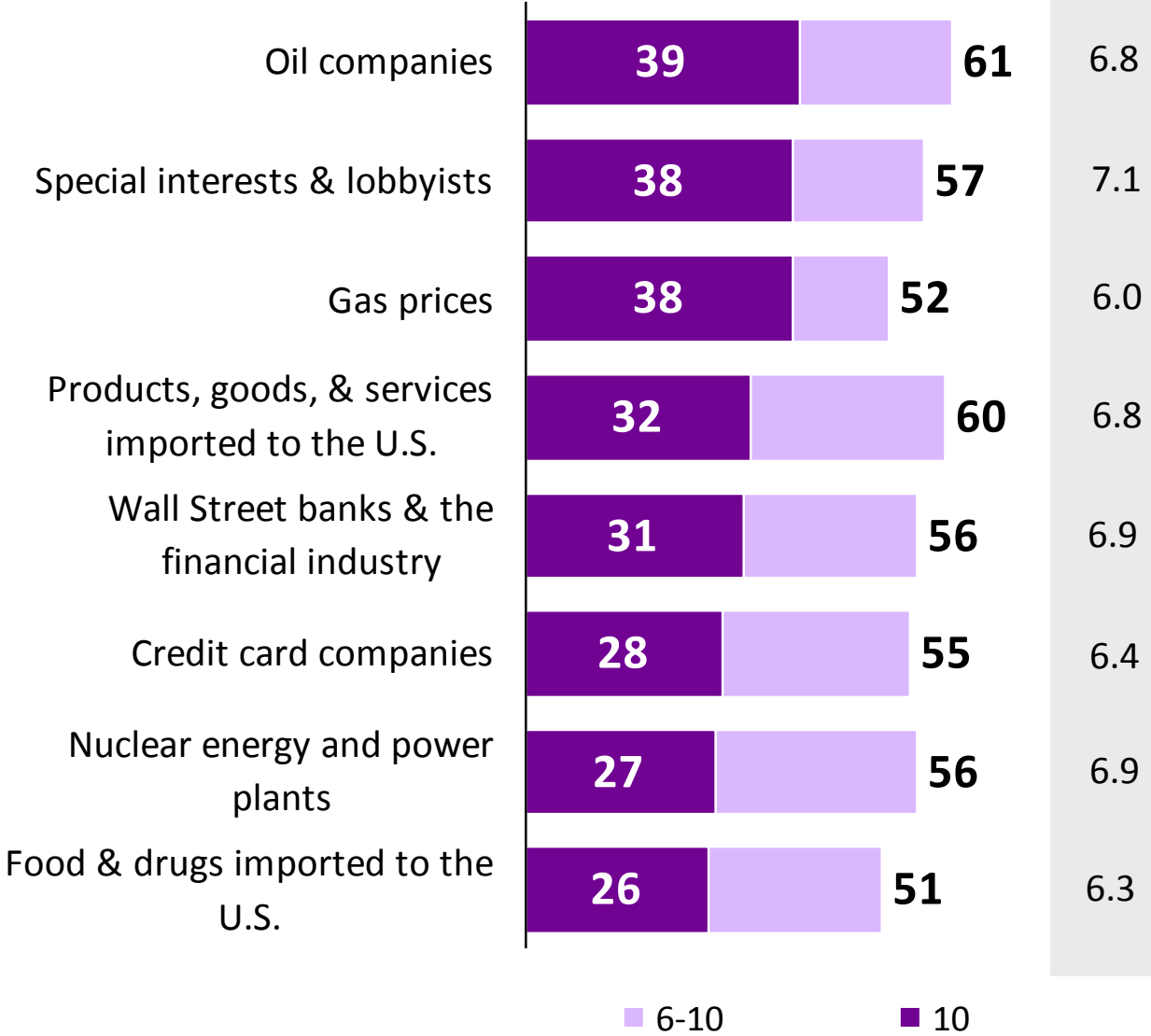
In spite of their misgivings, voters tend to favor greater regulation on a number of fronts where they feel ordinary people have been left open to harm—especially economic harm. Concerns over the relationship between lobbyists and politicians register with noticeable intensity and represent a key area for regulation as well. After indexing economic regulations, the key inhibitor of support is the perception that economic regulations are unnecessary, which recent events have helped counter.

Amount of Government Regulation Wanted



Now, I am going to read you a list of items that are regulated in the U.S. For each one, please tell me how content you are with the current level of regulation of that item, on a scale from 0 to 10 with 10 meaning you think that you think that we need much MORE regulation, 0 meaning that we need much LESS regulation, and 5 meaning you are content with the current level of regulation. You can be anywhere in between. If you're unsure about a particular item, just say so, and we'll go on.

Amount of Government Regulation Wanted--Top Tier--
Persuadables



The recent harm done by oil companies, special interests, the financial sector, imports, and nuclear energy and power plants does not go unnoticed among persuadable voters. These industries all represent avenues to pursue and engage persuadable voters. Politics and the special interests also represent a real area for regulation.

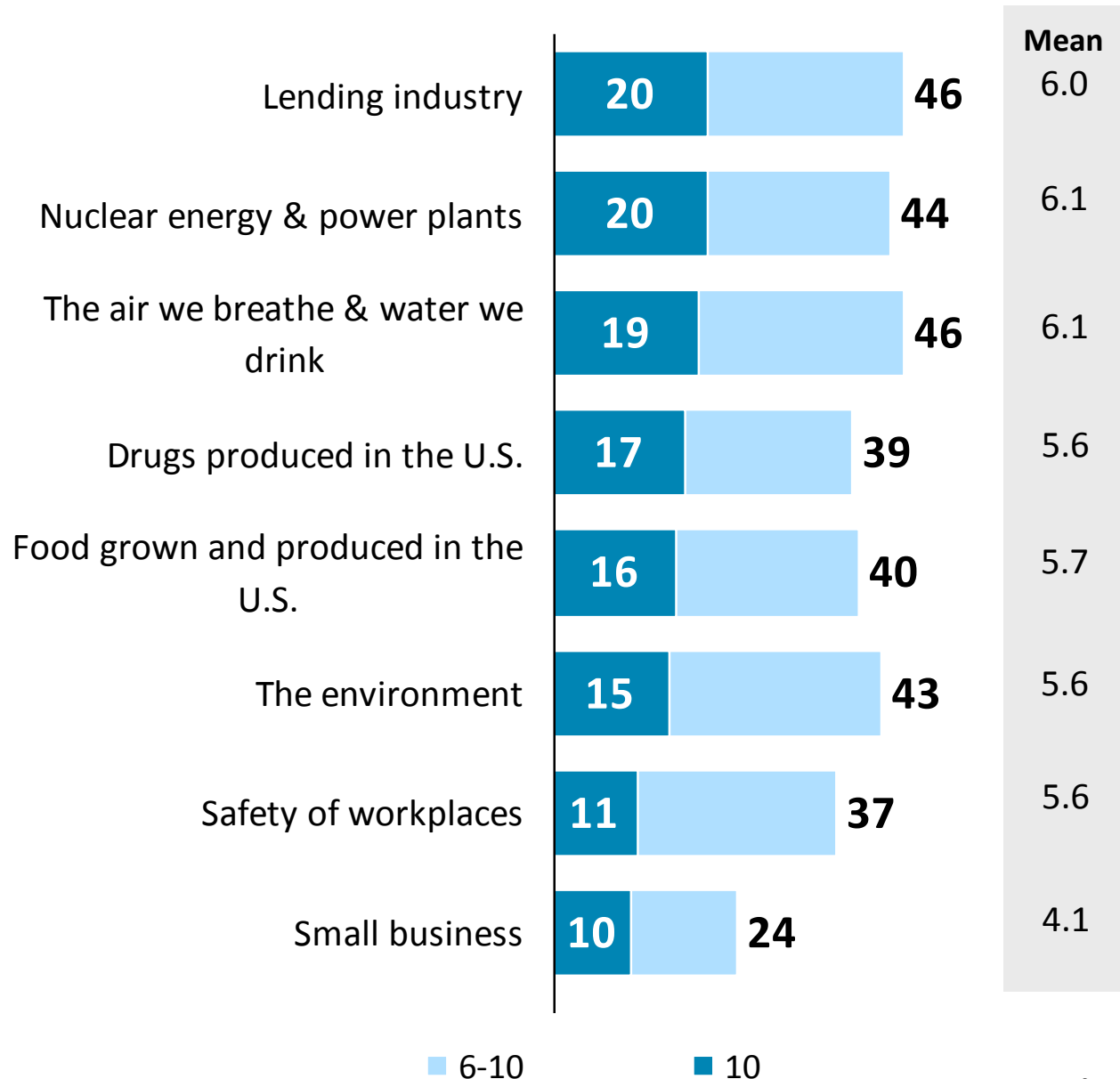
Now, I am going to read you a list of items that are regulated in the U.S. For each one, please tell me how content you are with the current level of regulation of that item, on a scale from 0 to 10 with 10 meaning you think that you think that we need much MORE regulation, 0 meaning that we need much LESS regulation, and 5 meaning you are content with the current level of regulation. You can be anywhere in between. If you're unsure about a particular item, just say so, and we'll go on.

The perception that regulations hurt small businesses, are unnecessary, and kill jobs are the most likely to predict to voters' initial opposition to greater regulation. Interestingly, the perception that regulations are "too costly" is not a significant factor, neither is "increases the deficit".

| Trait | Regression T-Score |
|-------------------------------|--------------------|
| Hurts Small Businesses | -2.757 |
| Unnecessary | -2.340 |
| Is a Job Killer | -2.308 |

Amount of Government Regulation Wanted

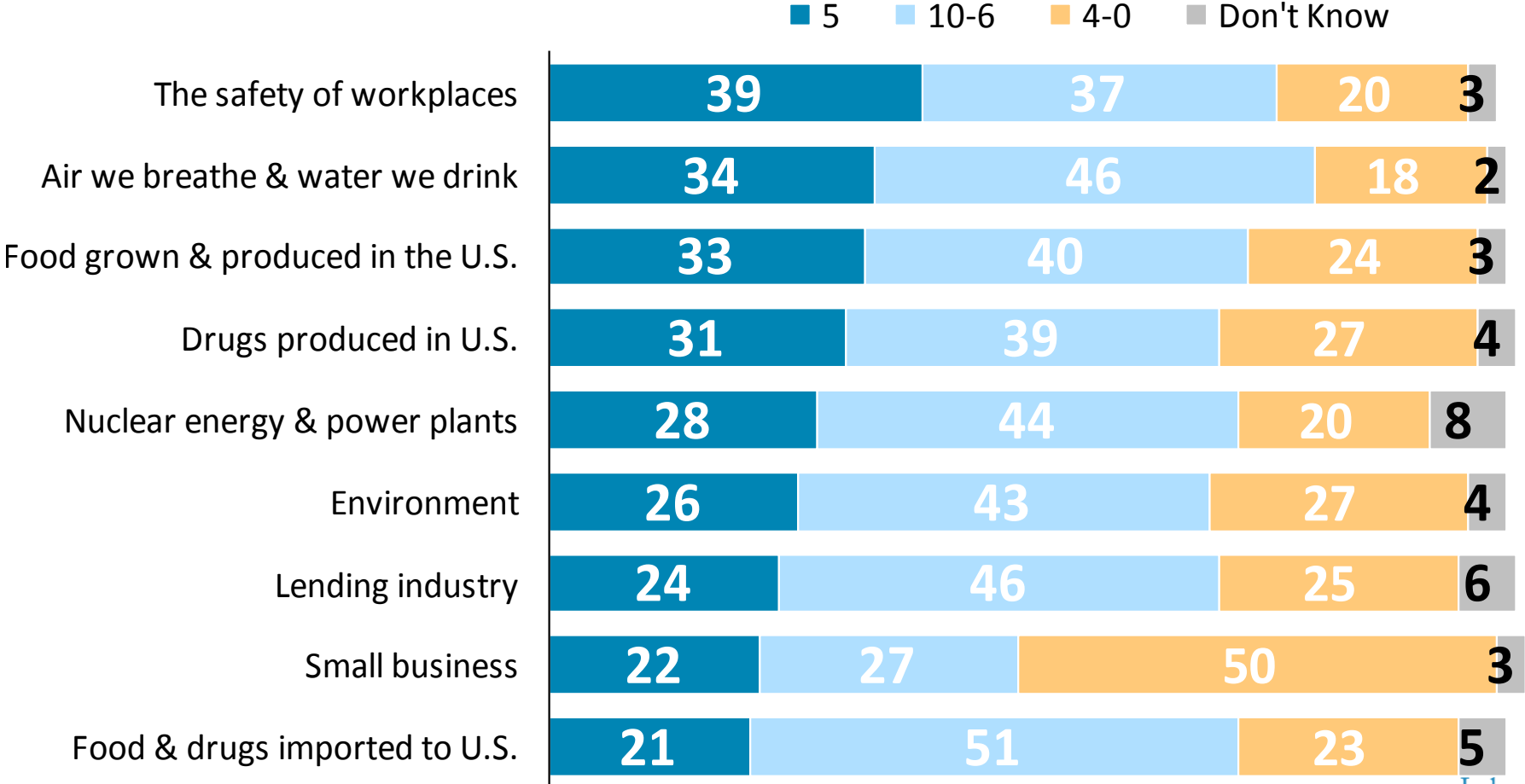
The one area where voters would prefer less regulation is small business. The focus groups showed that small business owners and non-small business owners alike range from skeptical to wholly unconvinced of regulations' ability to help small businesses grow and hire.



Now, I am going to read you a list of items that are regulated in the U.S. For each one, please tell me how content you are with the current level of regulation of that item, on a scale from 0 to 10 with 10 meaning you think that you think that we need much MORE regulation, 0 meaning that we need much LESS regulation, and 5 meaning you are content with the current level of regulation. You can be anywhere in between. If you're unsure about a particular item, just say so, and we'll go on.

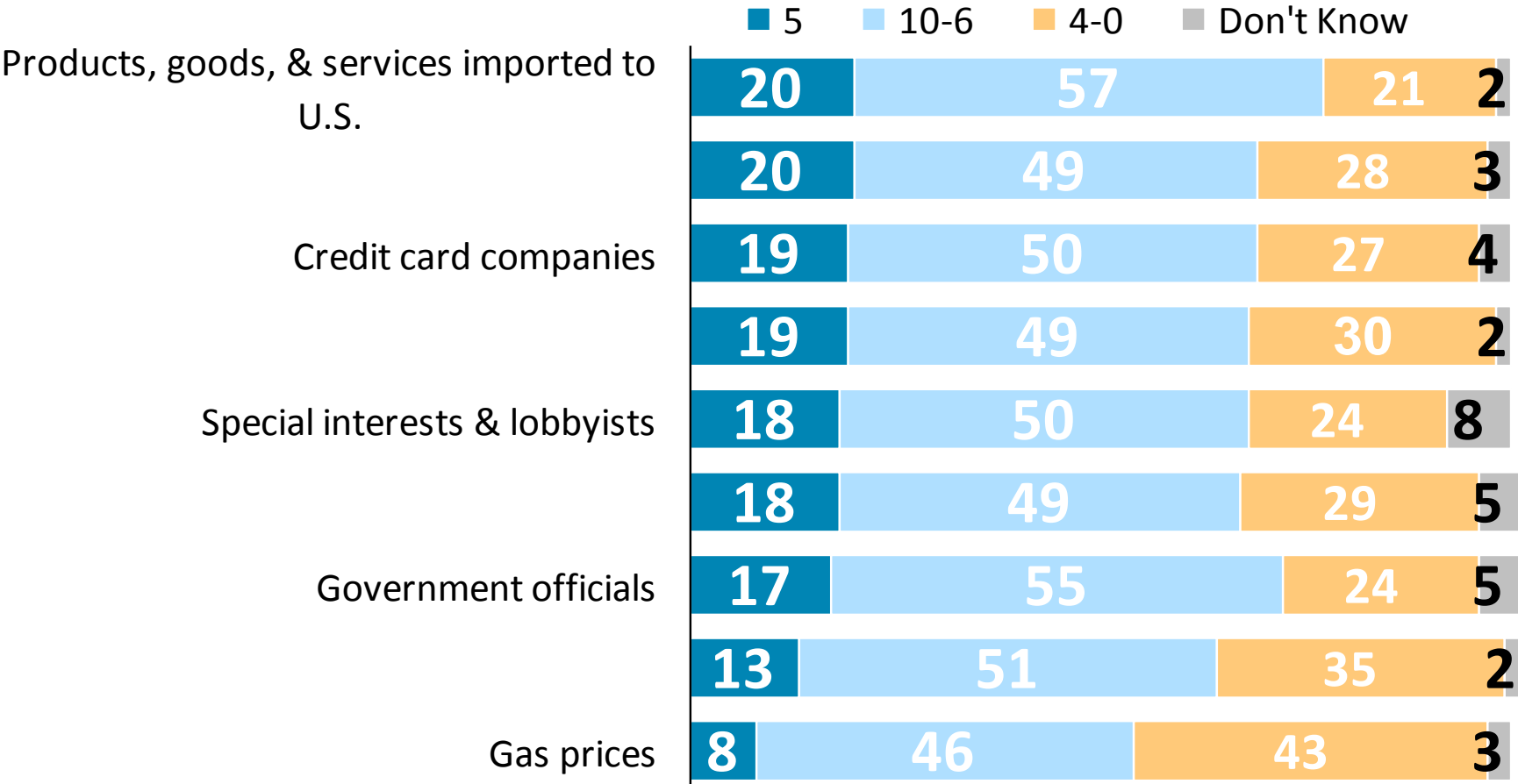
Looking at this a different way, on several fronts, large numbers of voters are more content with current levels of regulation, particularly regarding “social regulations”, such as the environment, workplaces, and food and drugs produced in the U.S. After indexing social regulations, the trait driving opposition to greater regulation among them is the perception that they are “too costly”.

Satisfaction with Current Level of Regulation--First Tier



Voters are far less satisfied with current levels of regulation regarding government and special interests, foreign imports, Wall Street, and credit card companies. Capitalizing on this discontent should be an imperative of any messaging efforts.

Satisfaction with Current Level of Regulation--Second Tier

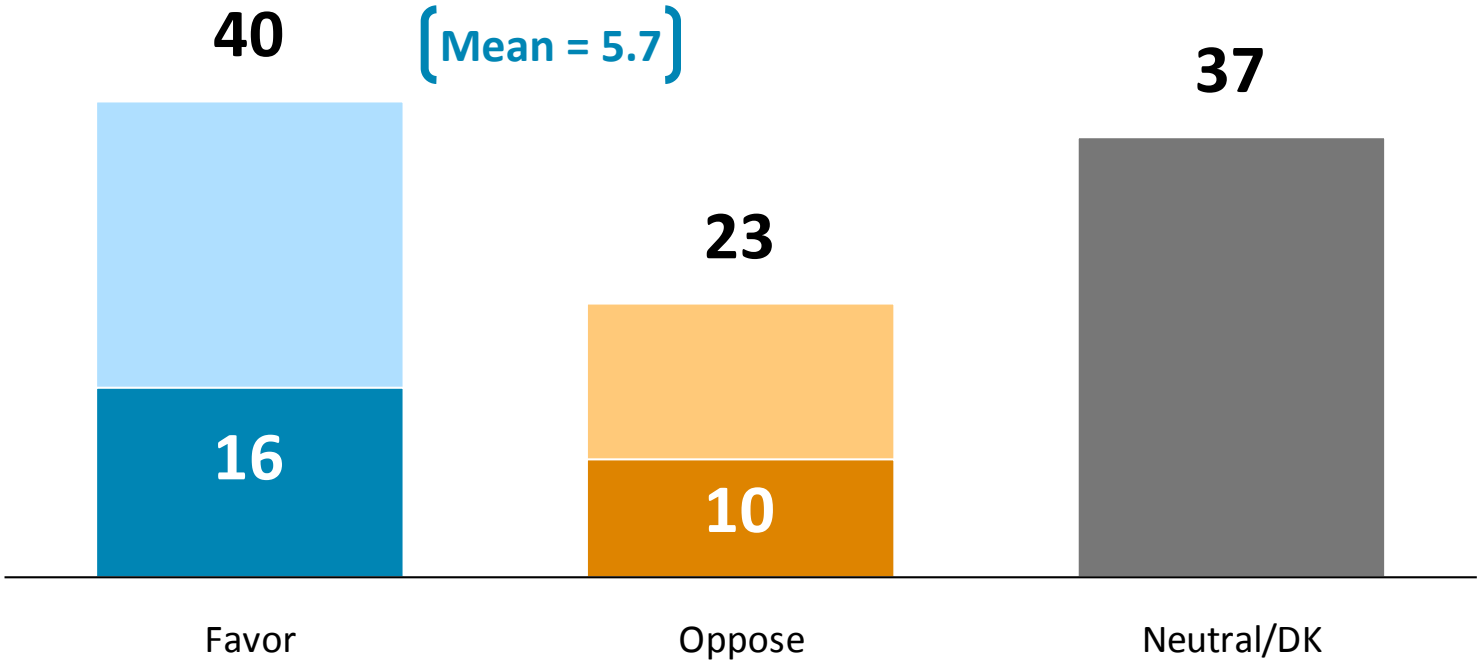


Contours of Support for Regulation

Voters' intense concern regarding overregulation does not impede their support for greater regulation of big business. In fact, voters start out tepidly in favor of greater regulation of big businesses and corporations, with support outpacing opposition. An engaged debate over the issue, however, pulls a narrow majority of voters into the support column, particularly when the pro-regulation argument is framed in terms of the collective successes that regulations have achieved for Americans over the years and new populist grievances.

A plurality of voters favors increasing regulation of big business and corporations, though intensity on both sides is closely matched, and over one-third of voters are neutral or unsure.

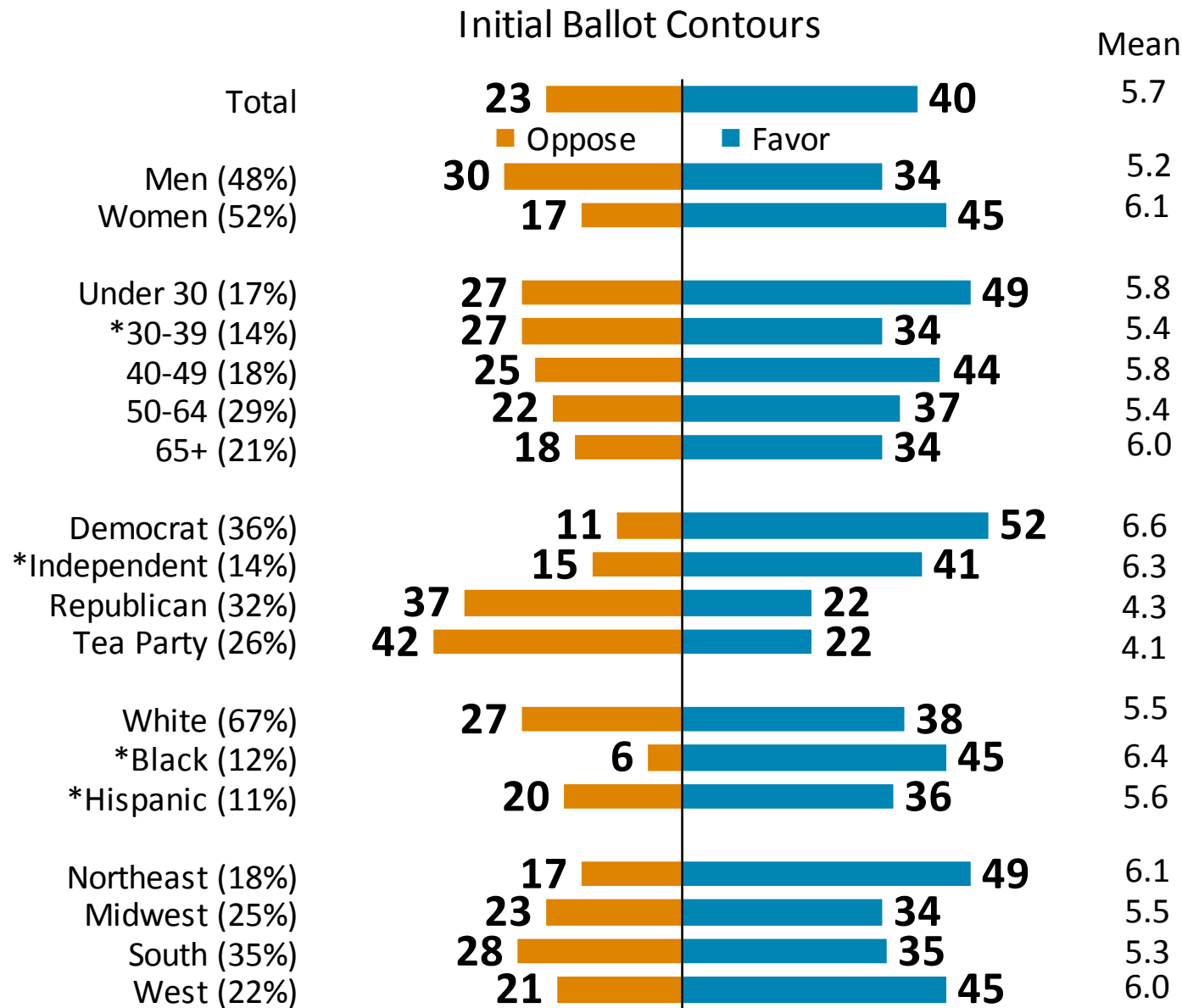
Initial Support for Increasing Regulation of Big Business and Corporations*



* Asked of half the sample. Darker colors used to indicate intensity.

On a scale of 0-10, where 0 means strongly oppose, 10 means strongly favor, and 5 is neutral, do you favor or oppose greater regulation of big businesses and corporations, or aren't you sure? You can be anywhere in between.

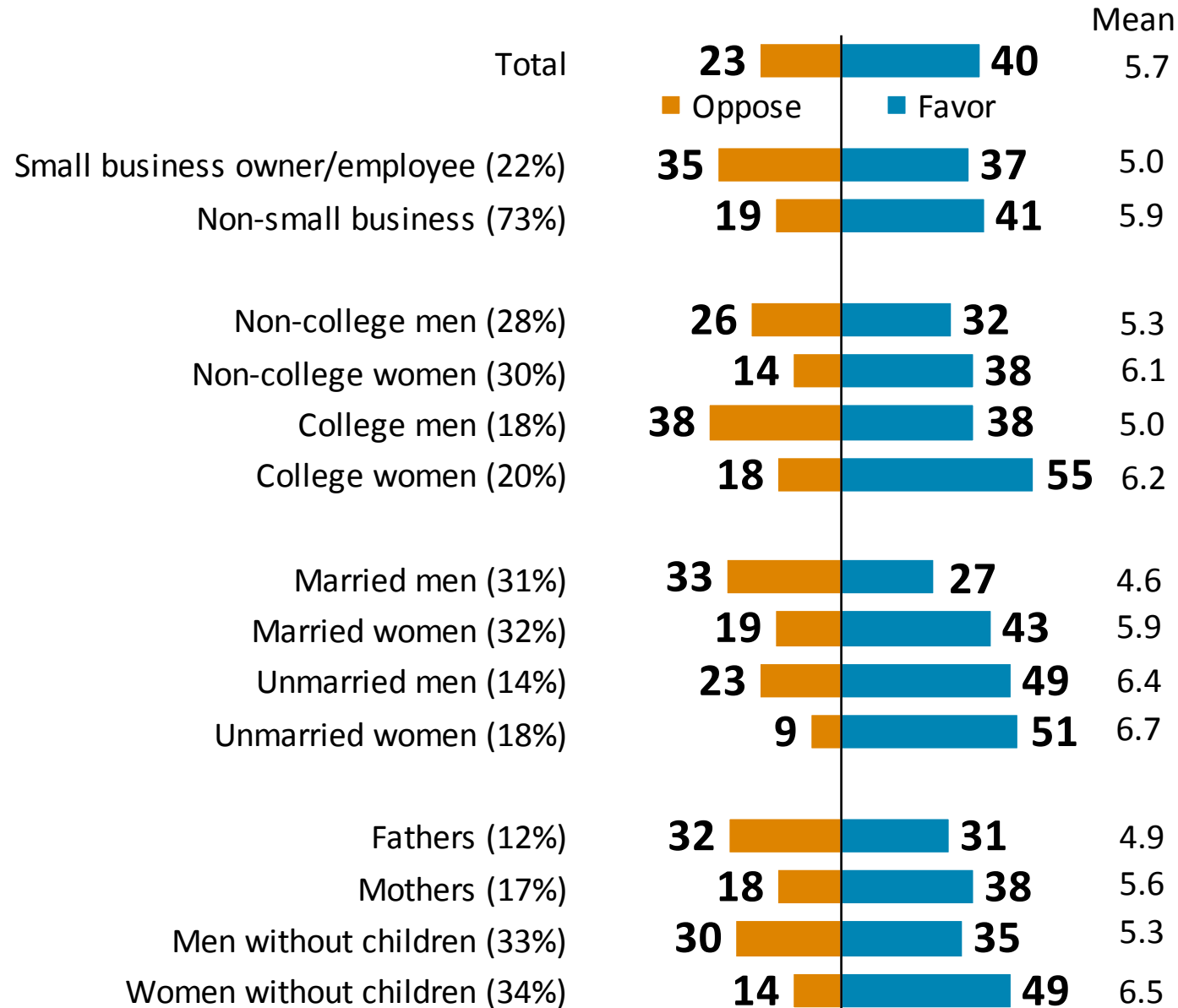
Democrats and—to a lesser extent—independents, African Americans, women, voters under 30, and voters in the Northeast and the West are most supportive of greater regulation.



*Denotes small n-size.

At the outset, college-educated women, unmarried women, and women without children represent some of the groups more in favor of greater regulation.

Initial Ballot Contours



The groups that start out disproportionately in favor of greater regulation include voters who oppose the Tea Party movement, older Democrats, younger independents, college-educated women, younger women, voters in their forties, unmarried voters, and African Americans.

% 8-10 Favor Greater Regulation (% Favor Overall) – 28% (40%):

- Women who oppose the Tea Party – 52% (63%)
- Oppose the Tea Party – 44% (60%)
- Democrats 50+ – 43% (54%)
- Independent w/leans <50* – 42% (50%)
- College women – 40% (55%)
- Democrats – 40% (52%)
- Women <50 – 37% (49%)
- 40-49 – 36% (44%)
- Women who don't have children – 35% (49%)
- College graduates + – 35% (47%)
- Unmarried – 34% (50%)
- African Americans* – 34% (45%)

Though these groups fall short of majority opposition, the groups who are most opposed to greater regulation include Republicans—especially strong Republicans and Republican men; supporters of the Tea Party movement—especially men who support the Tea Party; small business owners and employees; men—especially college-educated men, younger men, married men, and men living in the South; and younger college-educated voters.

% Oppose – 23%:

- Strong Republicans – 49%
- Republican men – 48%
- Men who support the Tea Party – 47%
- Supporters of the Tea Party – 42%
- College men – 38%
- Republicans – 37%
- Small business owners and employees – 35%
- Men <50 – 34%
- Married men – 33%
- Men living in the South – 32%
- South <50 – 32%
- College <50 – 31%
- Men – 30%

The groups that are the most neutral or undecided on greater regulation include voters with a high school diploma or less, older non-college educated voters and non-college educated women, African Americans, seniors, weak Republicans and older Republicans, independent women, older men, voters living in the Midwest, Latinos, mothers, and older voters living in the South.

% Neutral/Don't Know – 37%:

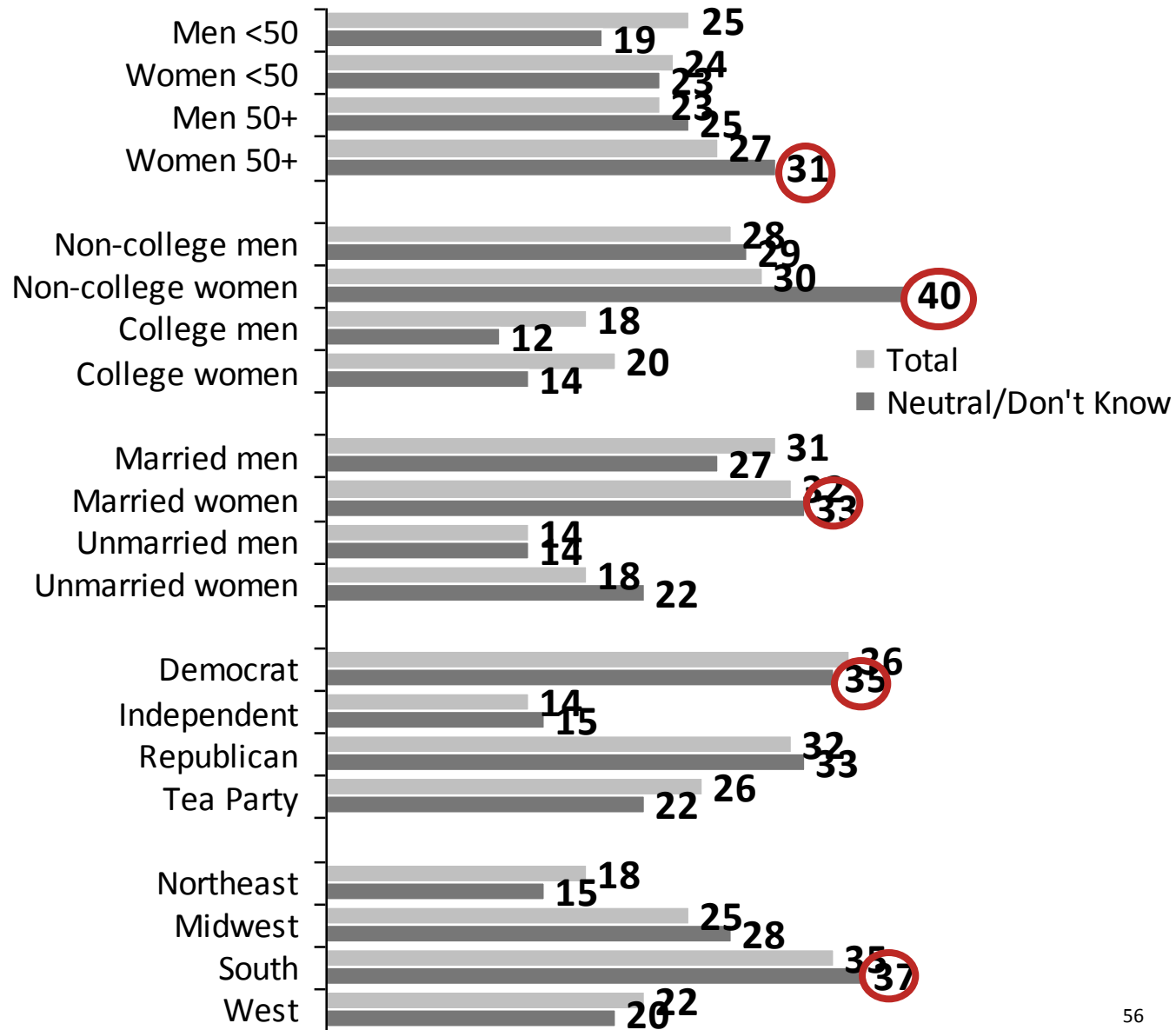
- H.S./Less – 59%
- Non-college 50+ – 50%
- African American* -- 49%
- 65+ – 48%
- Non-college women – 48%
- Republican women – 48%
- Men 50+ – 47%
- East North Central region** – 47%
- Weak Republicans – 45%
- Latinos* – 44%
- Mothers – 44%
- Independent w/leans women – 44%
- Republican 50+ – 44%
- South 50+ – 44%
- Independents* – 43%
- Midwest – 43%

*Denotes small n-size.

**East North Central region is defined as Illinois, Indiana, Michigan, Ohio, or Wisconsin.

Profile of the Neutral/Don't Know Voter

The profile of the neutral voter is a non-college educated, married woman over the age of 50, who is more likely to be a Democrat and living in the South.



After hearing arguments on each side of the regulation debate, nearly half of voters favor greater regulation of big businesses and corporations, with noticeable shift among Latinos, voters in the west, and non-college educated women. Although support grows more than opposition in this scenario, the intensity bolstering each side remains statistically tied.

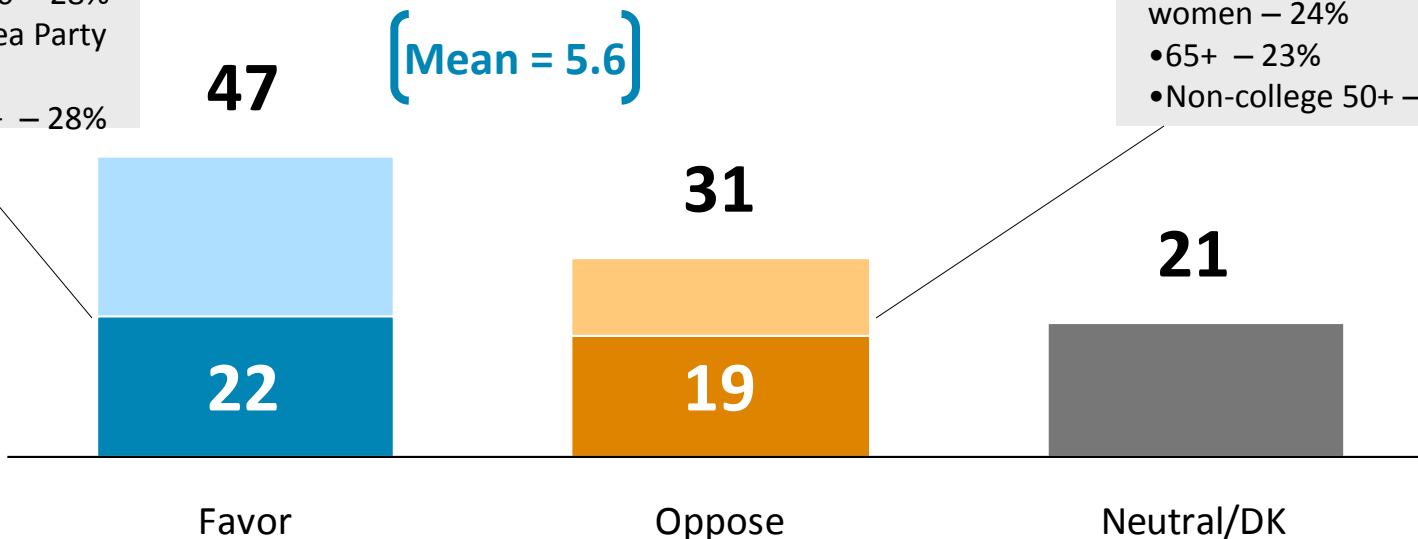
% Shift Toward Favor:

- West <50 – 39%
- West men – 36%
- Latinos – 35%
- Mothers – 29%
- Non-college women – 28%
- Singles – 28%
- Midwest women – 28%
- Democrats <50 – 28%
- Support the Tea Party women – 28%
- Northeast 50+ – 28%

% Shift Toward Oppose:

- Independents 50+ – 36%
- Independents – 24%
- H.S./Less – 24%
- West North Central – 24%
- Northeast men – 24%
- Neither Support nor Oppose the Tea Party women – 24%
- 65+ – 23%
- Non-college 50+ – 23%

Combined Profile Support for Increasing Regulation



Darker colors used to indicate intensity.

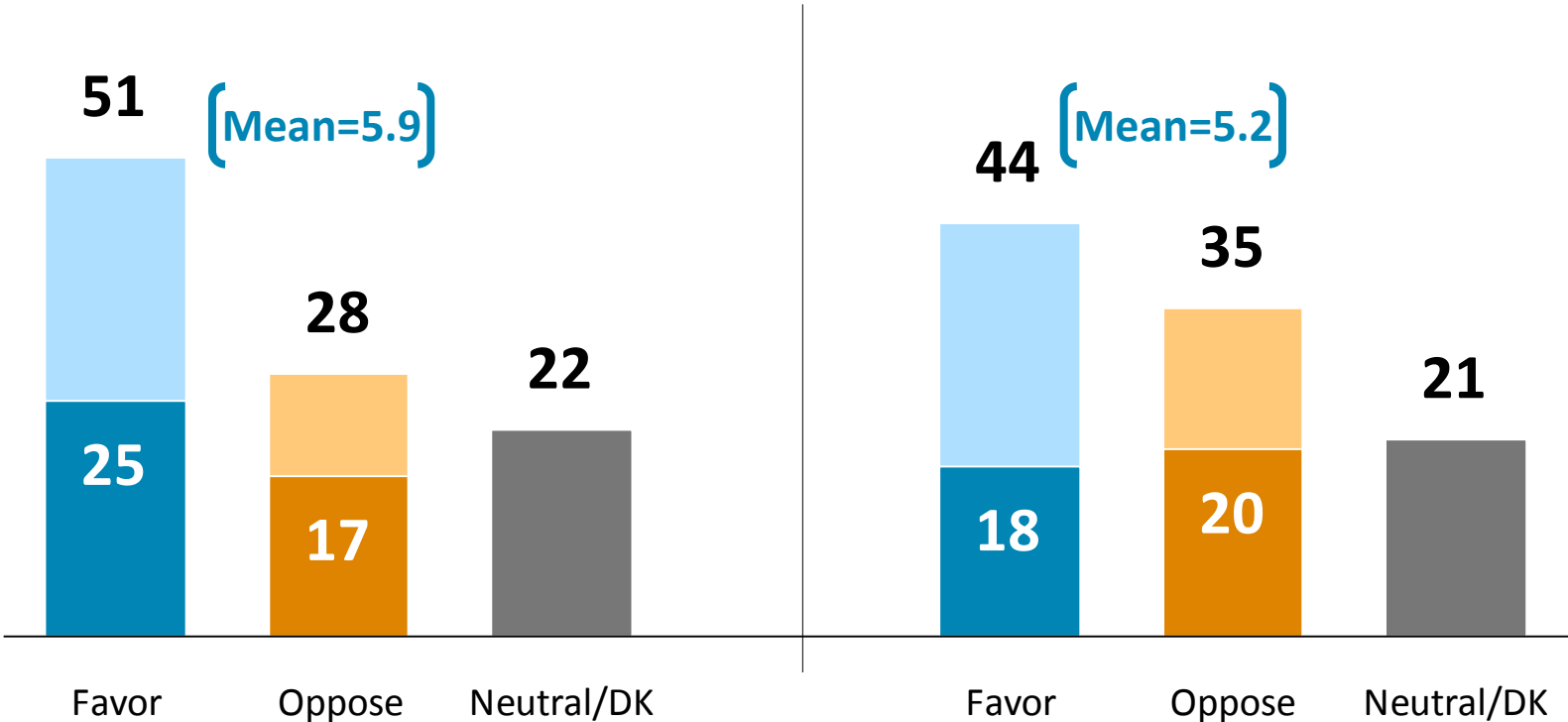
On a scale of 0-10, where 0 means strongly oppose, 10 means strongly favor, and 5 is neutral, do you favor or oppose greater regulation of big businesses and corporations, or aren't you sure? You can be anywhere in between.

The stronger message framework builds on existing perceptions of regulations' ability to protect people from harm while tapping into voters' antipathy toward Wall Street—and picks up support across the board. A framework built around resolving uncertainty, and anchored on helping small businesses thrive, still beats out the opposition's argument, but is far less compelling.

Engaged Debate

Collective Successes/Populist

Small Business/Uncertainty



Darker colors used to indicate intensity.

Sometimes over the course of a survey like this, people change their minds. On a scale of 0-10, where 0 means strongly oppose, 10 means strongly favor, and 5 is neutral, do you favor or oppose greater regulation of big businesses and corporations, or aren't you sure? You can be anywhere in between.

Engaged Debate Text

- Collective Successes/Populist Profile

We are supposed to be a government of, by, and for the people. But for government to work for people, we need to ensure accountability to all Americans and basic protections from financial collapse, nuclear meltdown, or dangerous food, air, water, or workplaces. Through agencies like the FDA, EPA, and others, regulations have successfully brought about major reductions in the number of deaths and illnesses related to contaminated food, unsafe products, and polluted air and water. But the need for safeguards doesn't stop there. We still need to hold Wall Street and the big banks accountable for the role they played in wrecking our economy, and ensure they can't commit the same crimes again. Effective standards and regulations, with oversight and enforcement, are what we need to promote and make both government and big business accountable to the American people.

- Small Business/Uncertainty Profile

Protective regulations and clear standards are necessary to protect workers, consumers, small businesses, and the economy as a whole from greed and recklessness. The economic crash in 2008 was a perfect example of what happens when basic rules and protections are not in place. Without rules and protections risky and predatory behavior can become the norm. Failing to regulate can have huge costs—8 million jobs lost, 1 million homes lost to foreclosure, and an economy still struggling to pull out of recession. Small businesses and American workers are the engines of the American economy. But we still have a system that favors big multinational corporations over hardworking American families and small businesses. To help prevent against future collapses, we need commonsense standards that promote economic growth, fair competition, and a level playing field.

- Opposition Profile

The government needs to understand the pressure and costs that regulations impose on hardworking Americans and small business owners. Flexibility and freedom are what allow businesses to be innovative and adapt to changing conditions. Increased bureaucracy, regulation, and red tape only stymie economic growth and competitiveness. Government doesn't create jobs, businesses do. So forcing business owners to conform to excessive government regulation is the wrong approach, and can lead to overreach by out-of-touch bureaucrats. Division in Washington has produced competing regulations, making it nearly impossible for businesses to function. Especially when we're trying to recover from the worst economic crisis in nearly a century, we don't need more government agencies telling us what to do. We need to cut red tape and allow businesses to grow and create jobs.

The most compelling aspects of our 10,000-foot argument revolve around themes of protection; safety; and simple, commonsense standards.

- “I think several of the things that we talked about as far as protecting from threats, from financial collapse, nuclear meltdown, insurance, safety of food, air and water and the work place are definitely things that we all talked about and I think pretty much agreed on that they need to be.” -Richmond man and small business owner
- “I like the common sense standards too. I underlined fair competition and economic growth and protect from greed. I liked that they said that.” -College-educated Richmond woman
- “Oversight coupled with simple standards for businesses promote the long-term viability of the U.S. economy. It sounds about right.”
-Richmond man and small business owner

Our opponents' message statement plays on public fears of inefficient (at best) and too tied to politics and the special interests, verging on corrupt (at worst) government and excessive red tape that keeps businesses from growing.

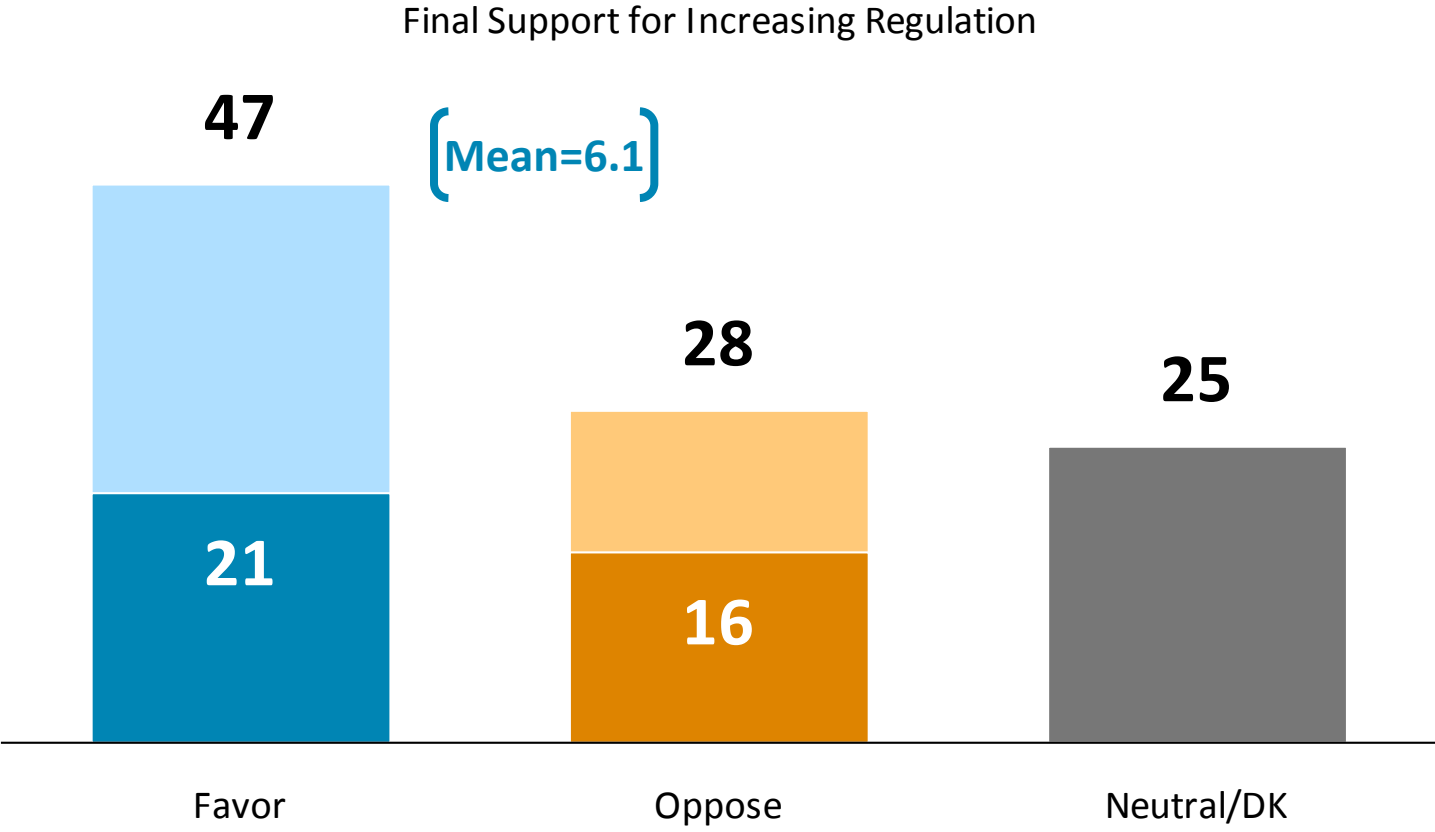
- “We don't need more government agencies telling us what to do. We need to cut red tape and allow businesses to grow and create jobs. I think that is really important. I have a friend of mine that is in business for himself and before he was in what he is now, he was a real estate developer. There were so many times because of some of these government regulations that were nonsensical. I don't remember any of them but I remember he used to tell me about these things. The business he is in now, it is kind of ridiculous the stuff. It is almost like they are keeping him from growing.” -Blue-collar Southfield man
- “I think we are bogged down with red tape and too much bureaucracy. It has forced people out of business.” -Richmond woman and small business owner
- “Government doesn't know what they are doing and why should they get involved. Who knows how to run their business better than the business owner? I mean, there should be standard regulations out there, but you shouldn't burden the business owner with over-regulations to make them jump through hoops to do something when they know their business better.”
-Blue-collar Southfield man

Using the strongest elements of the profiles, the most convincing messages, and the areas where voters want greater regulation, we would recommend characterizing our umbrella message in the following terms.

Revised Message Statement

In order for America once again to be a government of, by, and for the people, we need our government to work for us for a change. Special interests have gamed the system for too long. We need real accountability—from big businesses and our government. We've tried letting big business and multinational corporations police themselves—and we've paid the price. The twin failures of business and government to look out for hardworking Americans has cost us over a trillion dollars and over 8 million jobs. Regulations are not the only solution, but they are an important way to protect people from harm. They provide a line of defense for the little guy and in the past have protected Americans from dangerous or even fatal products, contaminated food, and polluted air and water. But the need for safeguards doesn't stop there. Oil companies and Wall Street are still engaging in predatory behavior, special interests are working with politicians to corrupt our government for their own ends, and the safeguarding of our air, water, and food supplies requires a watchful eye. With more and more Americans falling out of the middle class, we need to protect our seniors and families from having their life savings and retirements stolen or gambled away by Wall Street. We need regulations that ensure that products, both domestic and foreign, are safe—especially for kids. We need protections for Americans who work hard and play by the rules to build a better future for themselves and their children. Protecting our fellow Americans is part of who we are.

Further positive messaging on regulation erodes the increase in opposition from the engaged debate, dropping it back to its initial level. Support for regulation remains largely unchanged though the mean for support increases, and voters who start out neutral or unsure break our way by nearly 2:1.

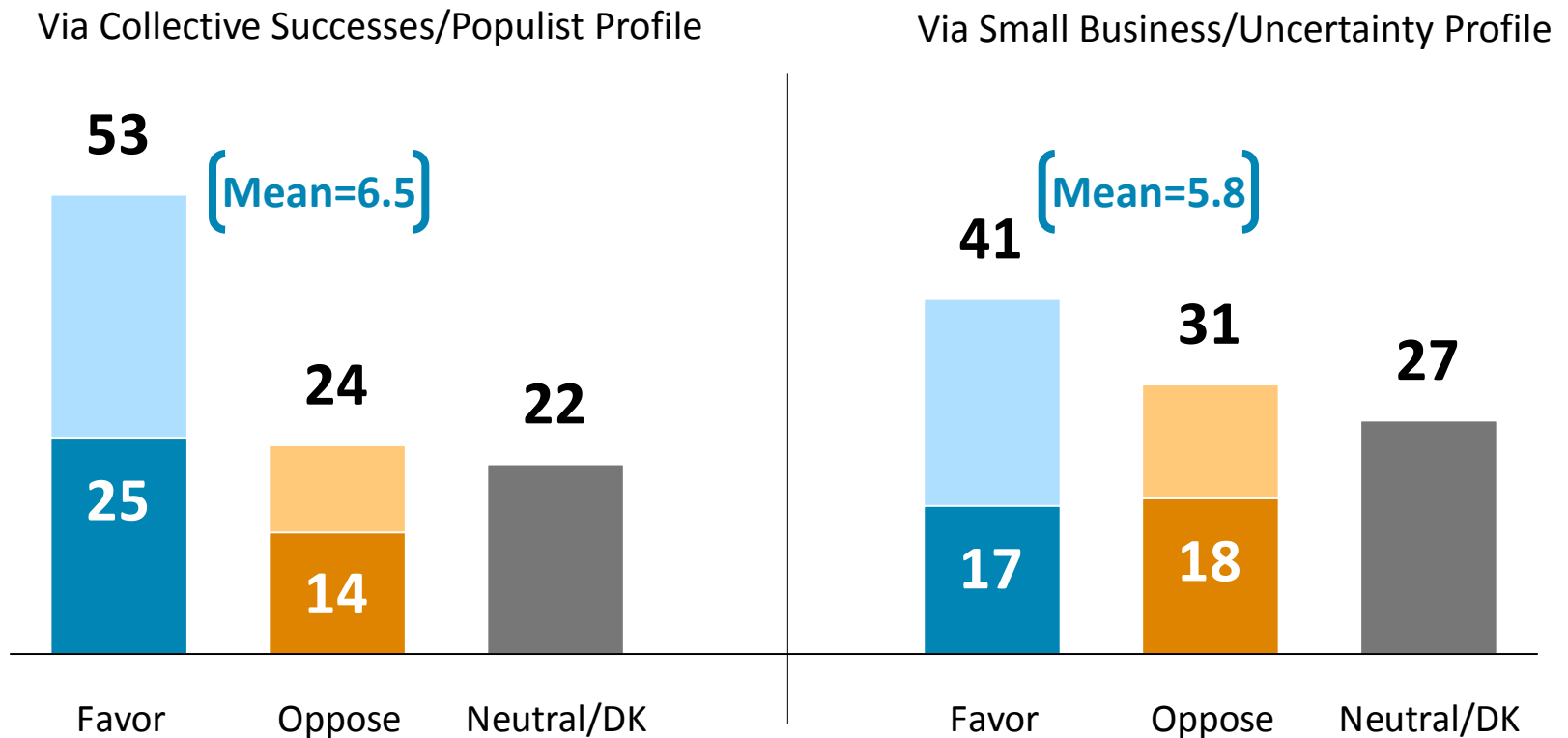


Darker colors used to indicate intensity.

On a scale of 0-10, where 0 means strongly oppose, 10 means strongly favor, and 5 is neutral, do you favor or oppose greater regulation of big businesses and corporations, or aren't you sure? You can be anywhere in between.

Voters who heard the “Collective Successes/Populist” message framework in the earlier engaged debate end up supporting more regulation by a far greater margin than those who heard the “Small Business/Uncertainty” message framework.

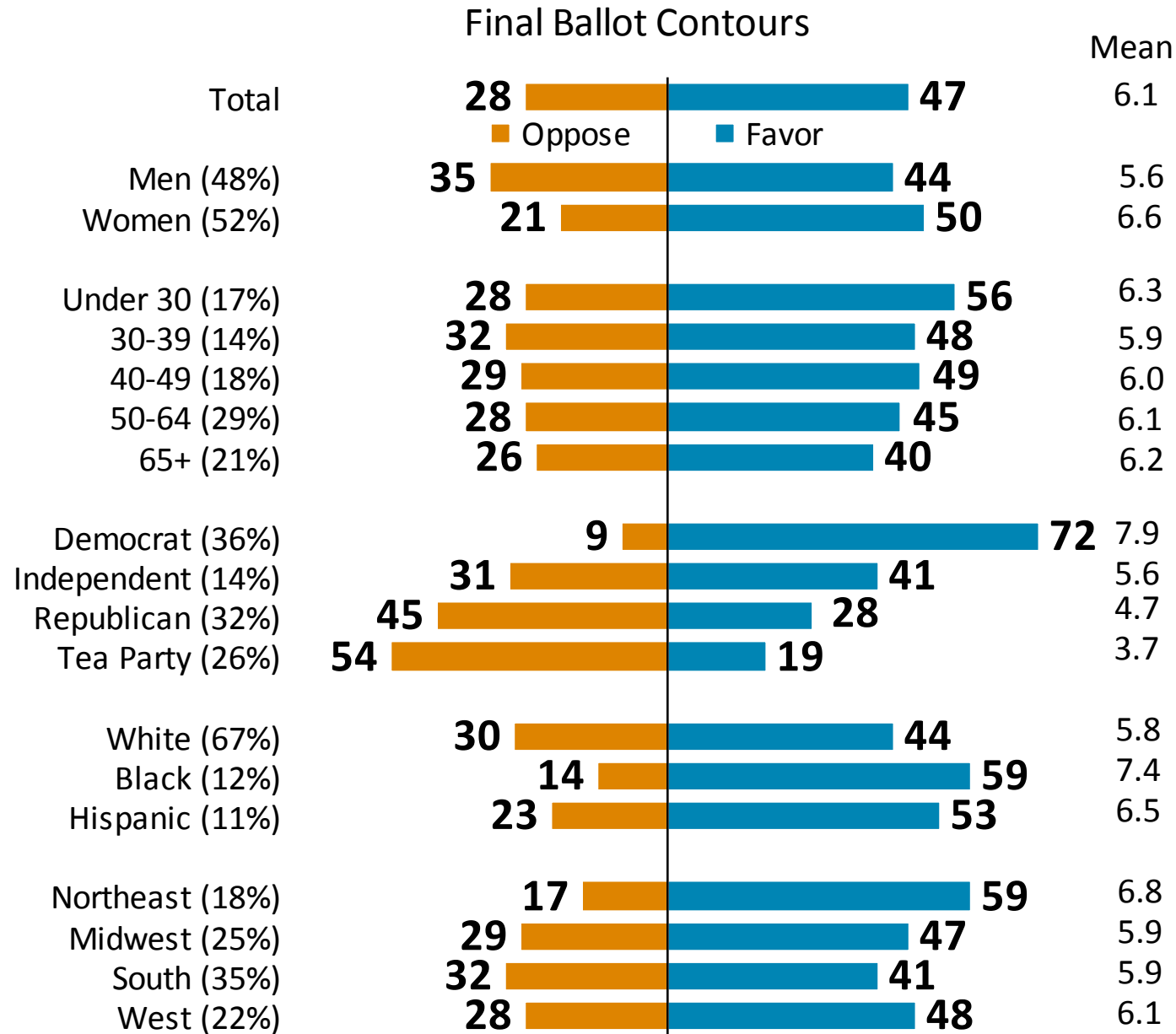
Final Support by Message Frame



Darker colors used to indicate intensity.

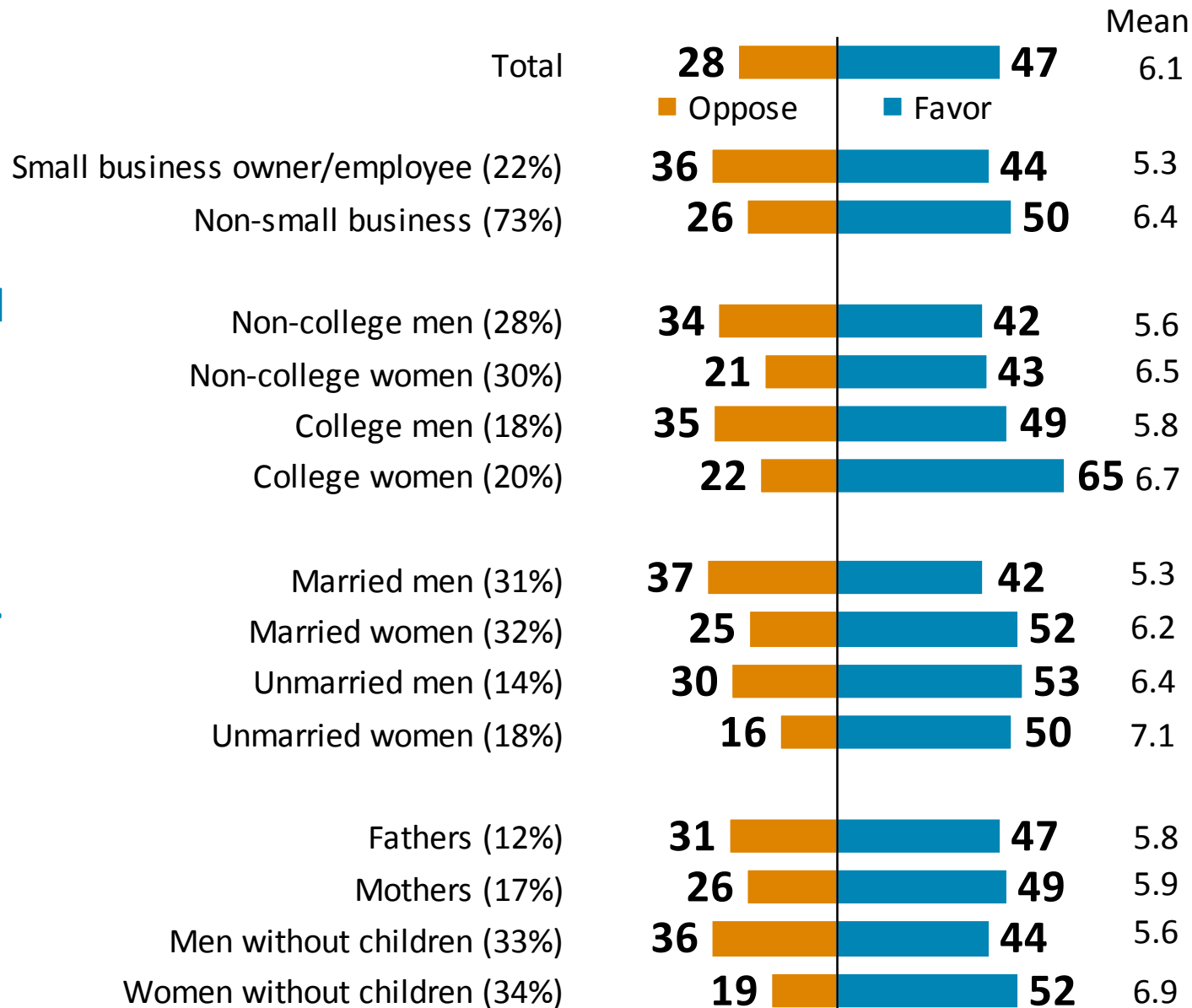
Sometimes over the course of a survey like this, people change their minds. On a scale of 0-10, where 0 means strongly oppose, 10 means strongly favor, and 5 is neutral, do you favor or oppose greater regulation of big businesses and corporations, or aren't you sure? You can be anywhere in between.

Each demographic group, while mostly keeping the same level of opposition, increases its overall support after messaging. This is particularly true of black and Hispanic voters, Democrats, and voters in the Midwest.



Further positive messaging on regulation also draws majority support from college-educated women, married women, unmarried men, and women without children. Opposition to regulation among unmarried women is extremely limited.

Final Ballot Contours



Over the course of the survey, more voters shift toward favoring greater regulation than against, but most hold fast in their initial opinions. The groups who are most solid in their positions are largely divided along partisan lines.

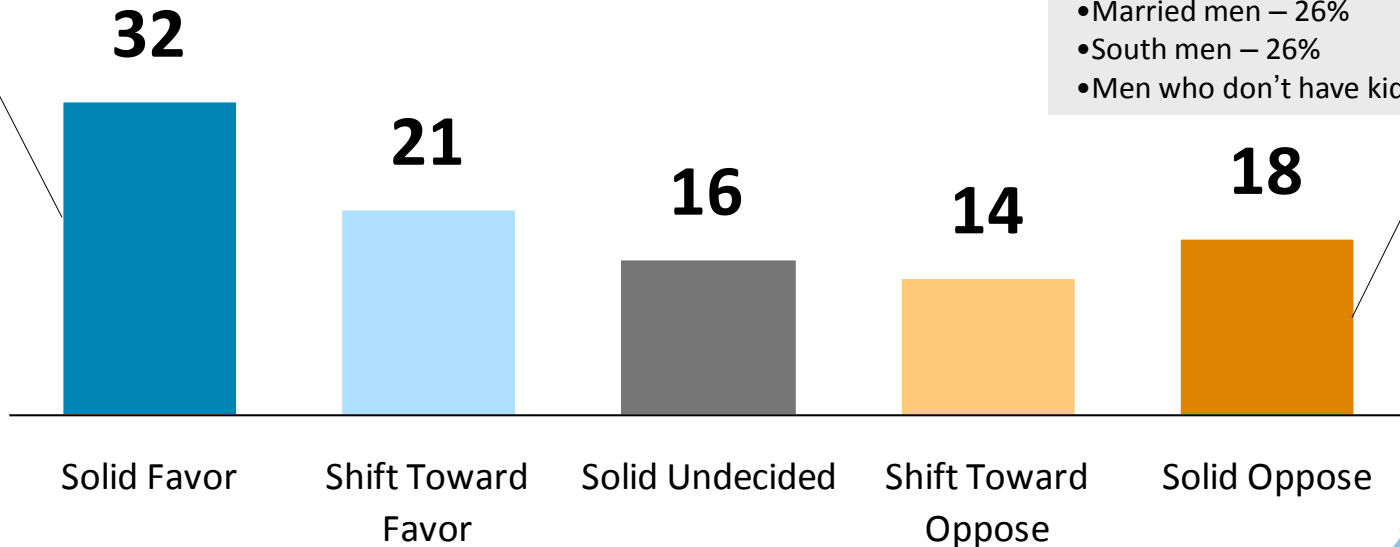
Most Likely to Solidly Favor Greater Regulation:

- Women who oppose Tea Party – 57%
- Democrats <50 – 56%
- Northeast <50 – 56%
- Oppose the Tea Party – 55%
- Democrats – 52%
- Northeast women – 49%
- Northeast – 45%
- Independents w/leans <50 – 42%
- Middle Atlantic region – 42%
- African American – 40%
- Women who don't have kids – 39%
- West women – 39%
- Under 30 – 39%

Most Likely to Solidly Oppose Greater Regulation:

- Men who support the Tea Party – 47%
- Supporters of the Tea Party – 44%
- Republican men – 42%
- Strong Republicans – 40%
- Republican <50 – 37%
- Republicans – 34%
- Small business – 30%
- West men – 30%
- Independent w/leans men – 28%
- Married men – 26%
- South men – 26%
- Men who don't have kids – 26%

Initial to Final Ballot Shift



After hearing further messages in support of greater regulation, the groups that shift most toward supporting greater regulation tend to be 40-49 year olds, Latinos, mothers, women and older voters living in the Midwest, men in the West, and voters in the West South Central region. Those who shift most against greater regulation tend to be older independents and men in the South. Younger voters living in the West become polarized over the course of the debate but many more shift toward supporting than opposing greater regulation of big business and corporations.

% Shift Toward Favor (21% Total):

- West <50 – 38%
- Latinos – 35%
- West men – 32%
- West South Central region* – 29%
- 40-49 – 26%
- Midwest women – 26%
- Midwest 50+ – 26%
- Mothers – 26%
- Neutral on Tea Party men – 26%

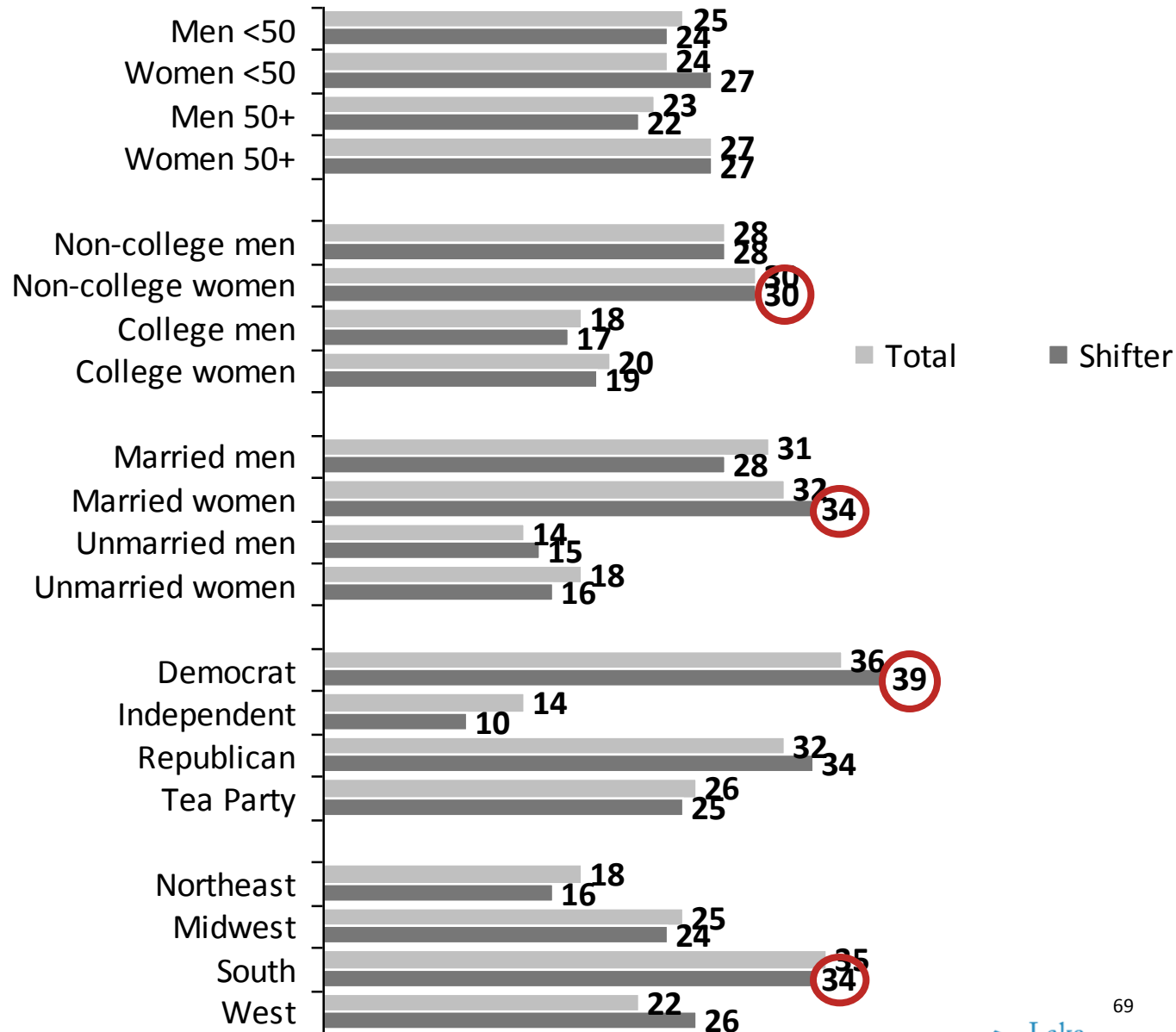
% Shift Toward Oppose (14% Total):

- Separated/divorced/widowed – 22%
- Independent 50+ – 21%
- South men – 20%
- West <50 – 19%

*Arkansas, Louisiana, Oklahoma, or Texas.

The profile of the voter who shifts toward favoring greater regulation is married, non-college educated, and living in the West or the South. By narrow margins these voters skew female and are also slightly more likely to be Democratic.

Profile of the Shifter

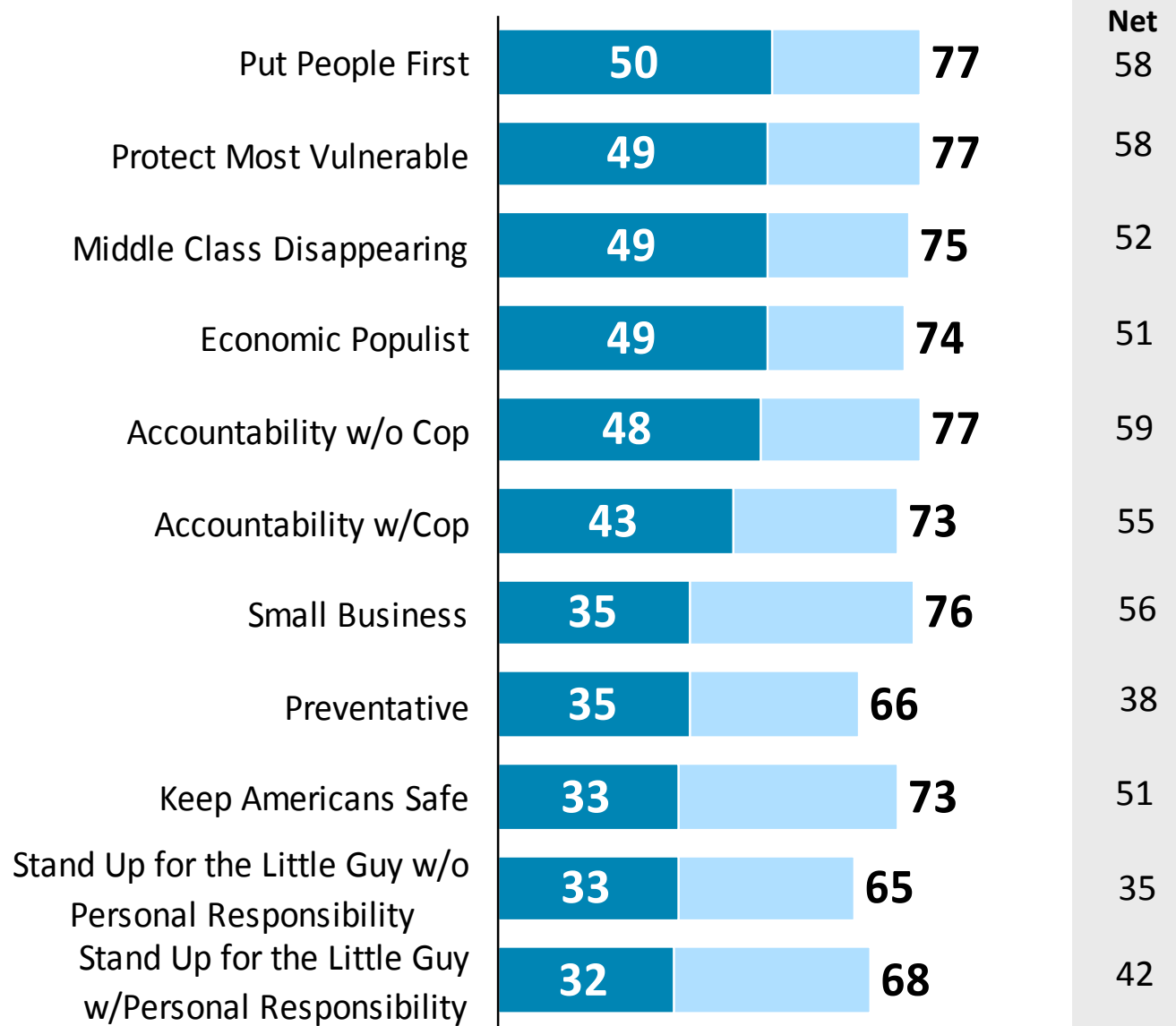


Messages and Positioning

Voters make major distinctions between the messages. The most convincing arguments revolve around accountability in government and in the financial sector, economic populism with references to Wall Street CEOs, protecting the most vulnerable, and rebuilding the middle class. Messages focused on preventative action invoke what are perceived to be recent failures of regulation and are therefore much less compelling.

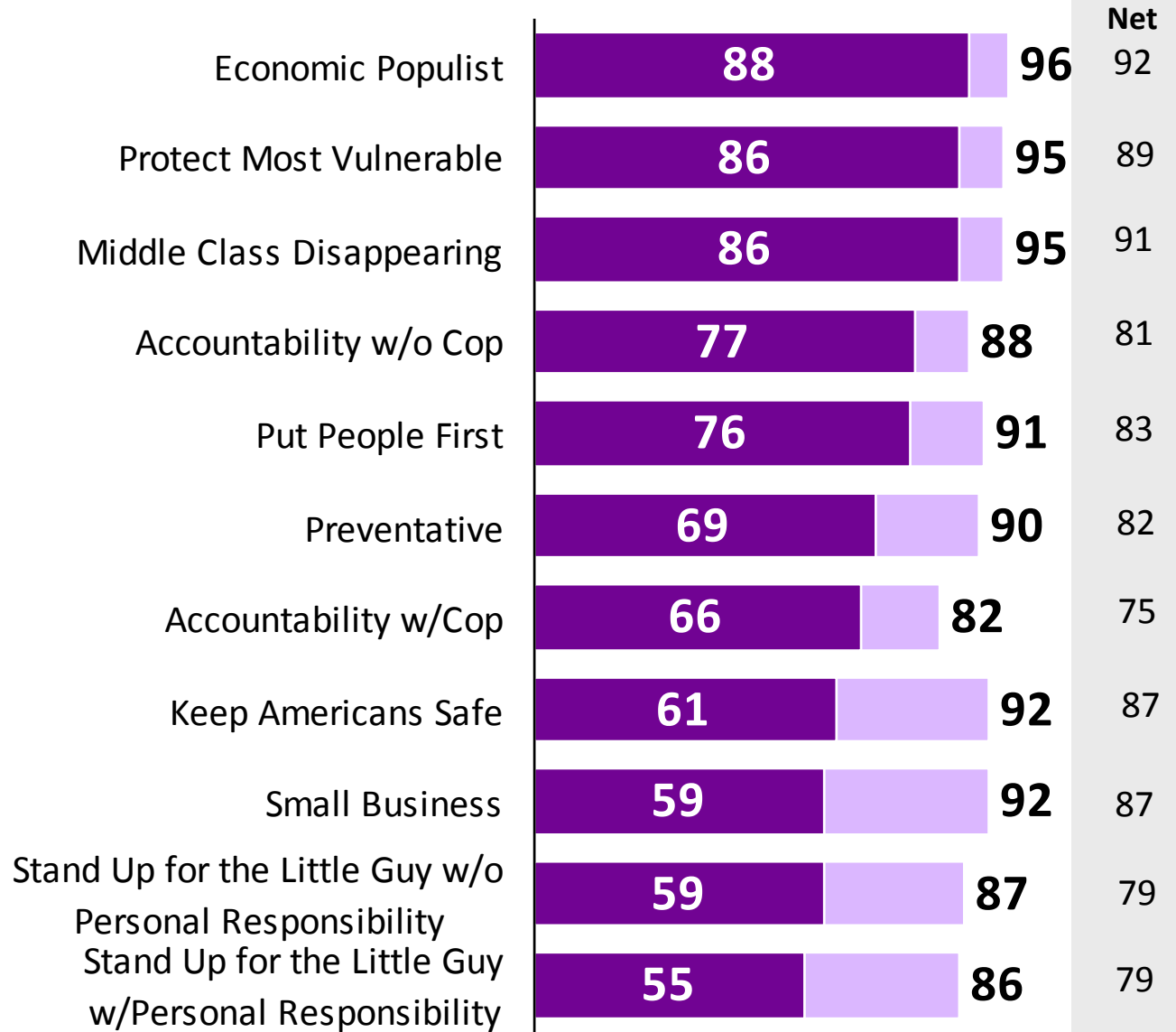
Positive Messages on Regulation

The most effective messages in favor of greater regulation have remarkable reach and intensity—nearly two-thirds of voters find them convincing, including roughly half who find them very convincing. The best arguments call for true accountability in both the public and private sectors, while tapping into the populist anger surrounding Wall Street and the disappearance of the middle class.



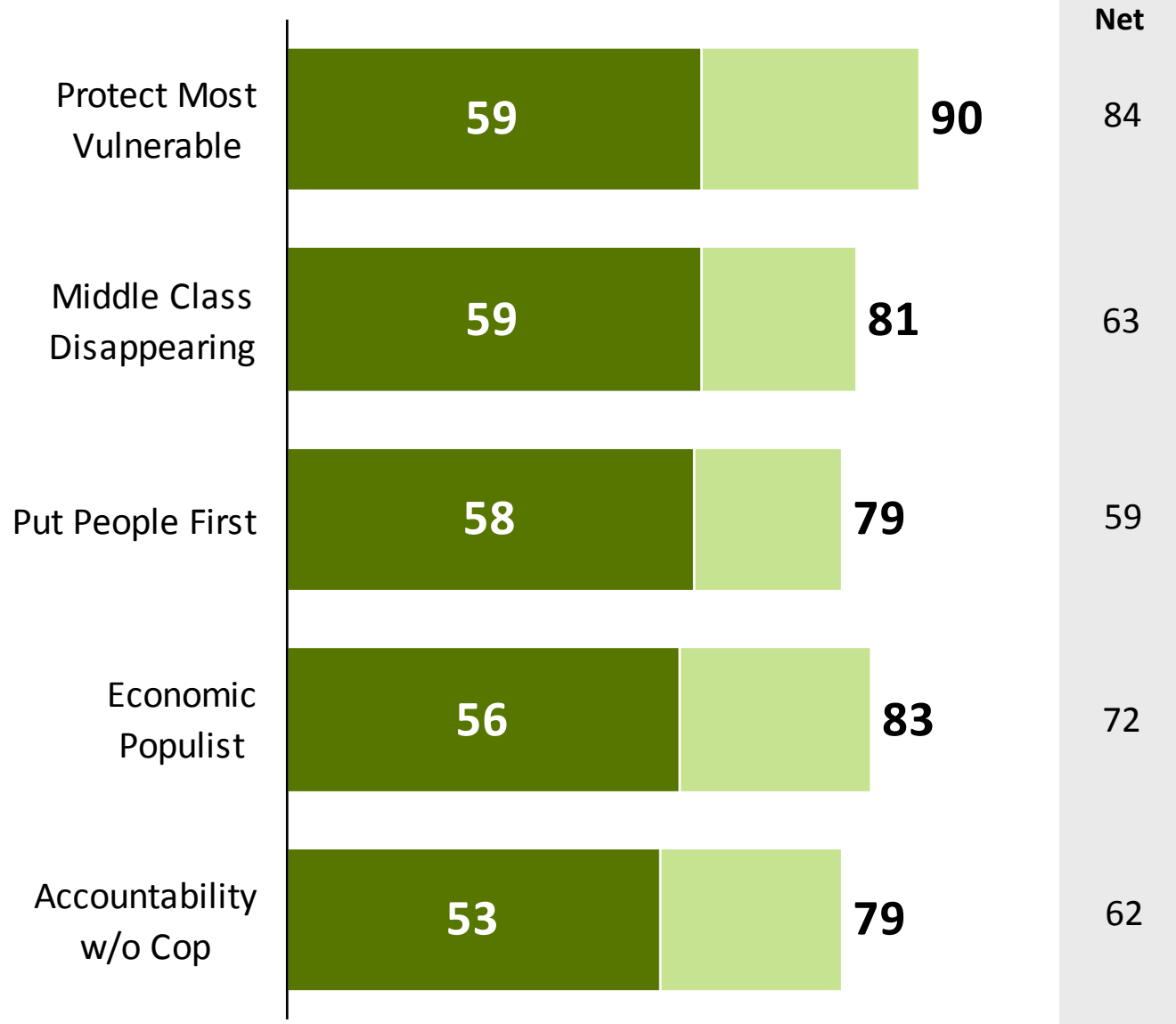
Positive Messages on Regulation--Persuadables

Among persuadable voters—those who neither strongly favor nor strongly oppose increasing regulation but who are moved by the messages and who are more populist—themes of economic populism, and the juxtaposition of the middle class with a burgeoning corporate elite, are particularly resonant.



Positive Messages on Regulation--Shifters--Top-Tier

The same messages that work with all voters work with those who shift our way. Further analysis suggests that real drivers of change are protecting the most vulnerable, the middle class disappearing, and economic populism. These are also values-oriented voters who respond strongly to the principles of prevention as well protection and responsibility.



Persuadable voters are moved by many of our messages, but respond most intensely to the “Economic Populist” and “Middle Class” messages. The same is true for older women as well. Non-college educated women and married women both find an argument based on protecting the most vulnerable compelling.

| Messages (% Very Convincing) | Persuadable | Neutral/ Don't Know | Older Women | Non-College Women | Married Women |
|--|-------------|------------------------|----------------|----------------------|------------------|
| Put People First | 76 | 45 | 53 | 52 | 52 |
| Protect the Most Vulnerable | 86 | 47 | 51 | 60 | 57 |
| Middle Class Disappearing | 86 | 54 | 54 | 57 | 49 |
| Economic Populist | 88 | 46 | 57 | 55 | 54 |
| Accountability w/o Cop | 77 | 39 | 46 | 47 | 44 |

Regionally, the “Put People First” message resonates most strongly in the Northeast and Midwest, though Midwesterners also find the “Economic Populist” message convincing as do voters in the West. Westerners are also moved by the argument for protecting the most vulnerable, while Southerners find the “Middle Class” message most persuasive.

| Messages (% Very Convincing) | Northeast | Midwest | South | West |
|------------------------------------|-----------|---------|-------|------|
| Put People First | 64 | 58 | 46 | 34 |
| Protect the Most Vulnerable | 43 | 55 | 46 | 50 |
| Middle Class Disappearing | 58 | 47 | 48 | 48 |
| Economic Populist | 54 | 57 | 41 | 51 |
| Accountability w/o Cop | 58 | 44 | 45 | 46 |

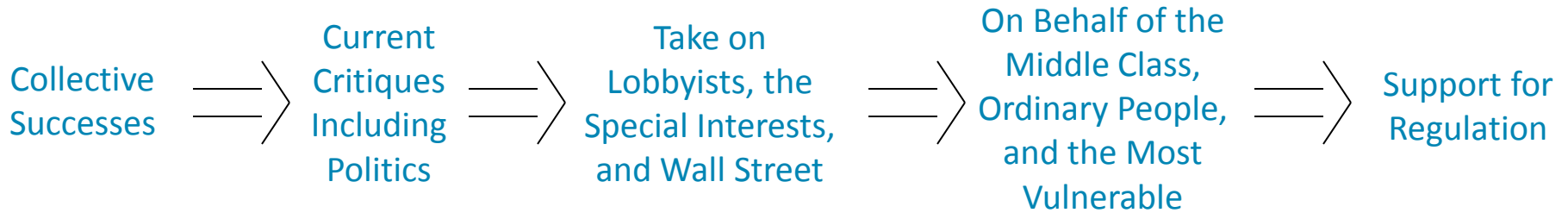
Text of Messages—First Tier

- **[PUT PEOPLE FIRST]** Washington lobbyists have the time, money, and power to affect the decisions politicians make. Too many of our representatives have met behind closed doors with the special interests, taken their money, and done their bidding. It's time for our government to realize they need to make decisions that are in the best interest of the people, not the special interests. Regulation and oversight of special interests and politicians can promote transparency, greater openness, and accountability to all Americans.
- **[PROTECT MOST VULNERABLE]** Protecting the most vulnerable in our society is part of who we are as Americans. We need to protect our seniors and families from having their life savings and retirements stolen or gambled away by Wall Street. We need regulations that ensure that products, both domestic and foreign, are safe—especially when it comes to our seniors and children. We need to take extra steps to protect the most vulnerable in our society.
- **[MIDDLE CLASS DISAPPEARING]** More and more Americans are falling out of the middle class. We need commonsense regulations that protect our families so that people don't lose their homes and savings because somebody on Wall Street gambled them away, or sold them a faulty financial product. We need protections for families who work hard and play by the rules to build a better future for themselves and their children.
- **[ECONOMIC POPULIST]** The C.E.O. of a corporation has no more right to steal your money and life savings than a thief on the street. The C.E.O.s who wrecked our economy, took bailout money, and then gave themselves big bonuses should be held accountable to the taxpayers and small businesses they stole from. By enacting and enforcing sensible regulations that promote fairness and oversight, we can send a signal that this criminality won't be tolerated, and we can help prevent these types of abuses.
- **[ACCOUNTABILITY W/O COP]** Ours is supposed to be a government of, by, and for the people. But for democracy to work, we need effective standards and regulations for accountability and transparency. Special interests shouldn't be able to meet with public officials in secret, bury pork-barrel projects in the budget, or push through no-bid contracts. Regulators should act as an enforcer of the laws that are already on the books and hold offenders accountable—whether they're inside government or out.

Less compelling are messages that invoke government's ability to prevent harm—without acknowledging recent failures, focus on helping small businesses, or use the mortgage crisis as a fulcrum for action.

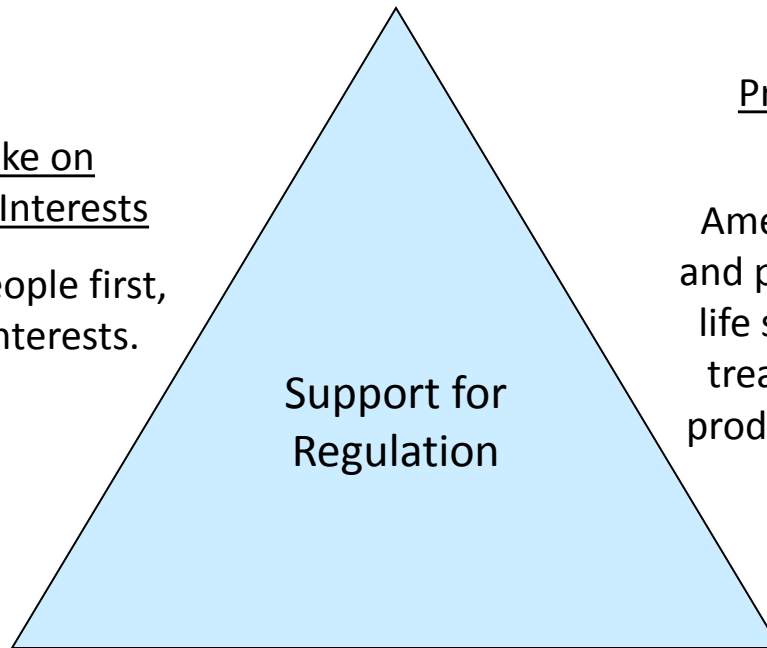
- **[ACCOUNTABILITY W/COP]** Ours is supposed to be a government of, by, and for the people. But for democracy to work, we need effective standards and regulations for accountability and transparency. Special interests shouldn't be able to meet with public officials in secret, bury pork-barrel projects in the budget, or push through no-bid contracts. Regulators should act as an enforcer of the laws that are already on the books, like a cop on the beat, and hold offenders accountable—whether they're inside government or out.
- **[SMALL BUSINESS]** Small businesses represent the strength and spirit of America and an engine of economic growth that benefits all of us. Commonsense rules can help small businesses grow and prosper by providing clarity, predictability, stability, and opportunity. Regulations protect small businesses as well as our families from predatory lenders, greedy banks and insurance companies, and faulty products, helping make a fairer atmosphere in which small businesses can compete.
- **[PREVENTATIVE]** Americans deserve the chance to earn a living, pay a mortgage, and save for retirement without Wall Street gambling away the fruits of their labor. We've paid the price, one that's cost us over a trillion dollars and over 8 million jobs because of the twin failures of business and government to look out for hardworking Americans. Tough oversight and regulation of the Wall Street banks and predatory mortgage lenders is necessary to safeguarding the economic security of the country.
- **[STAND UP FOR THE LITTLE GUY W/O PERSONAL RESPONSIBILITY]** Government regulations are one way of ensuring that ordinary Americans aren't left in financial ruin through no fault of their own. It shouldn't be legal for a company to sell you a mortgage that destroys you financially even when you make all your payments on time. Government regulations can help provide a line of defense for the little guy who doesn't have the time, expertise, and resources to compete with the might of multinational corporations and banks and their massive legal departments.
- **[STAND UP FOR THE LITTLE GUY W/PERSONAL RESPONSIBILITY]** Government regulations are one way of ensuring that ordinary Americans aren't left in financial ruin through no fault of their own. It shouldn't be legal for a company to sell you a mortgage that destroys you financially even when you make all your payments on time. And while there's no substitute for personal responsibility, government regulations can help provide a line of defense for the little guy who doesn't have the time, expertise, and resources to compete with the might of multinational corporations and banks and their massive legal departments.

The messaging triangle we want to utilize moving forward is:



Put People First and Take on Lobbyists and the Special Interests

Put the best interests of people first, not those of the special interests.



Accountability

Protect the Most Vulnerable, Rebuild the Middle Class

American families that work hard and play by the rules have had their life savings stolen by Wall St., and treated as guinea pigs for unsafe products, goods, and services from multinational and foreign corporations.

We've tried letting the corporate CEOs and politicians police themselves—and we've paid the price in American lives and health, not to mention over a trillion dollars and 8 million jobs. It is time for real accountability.

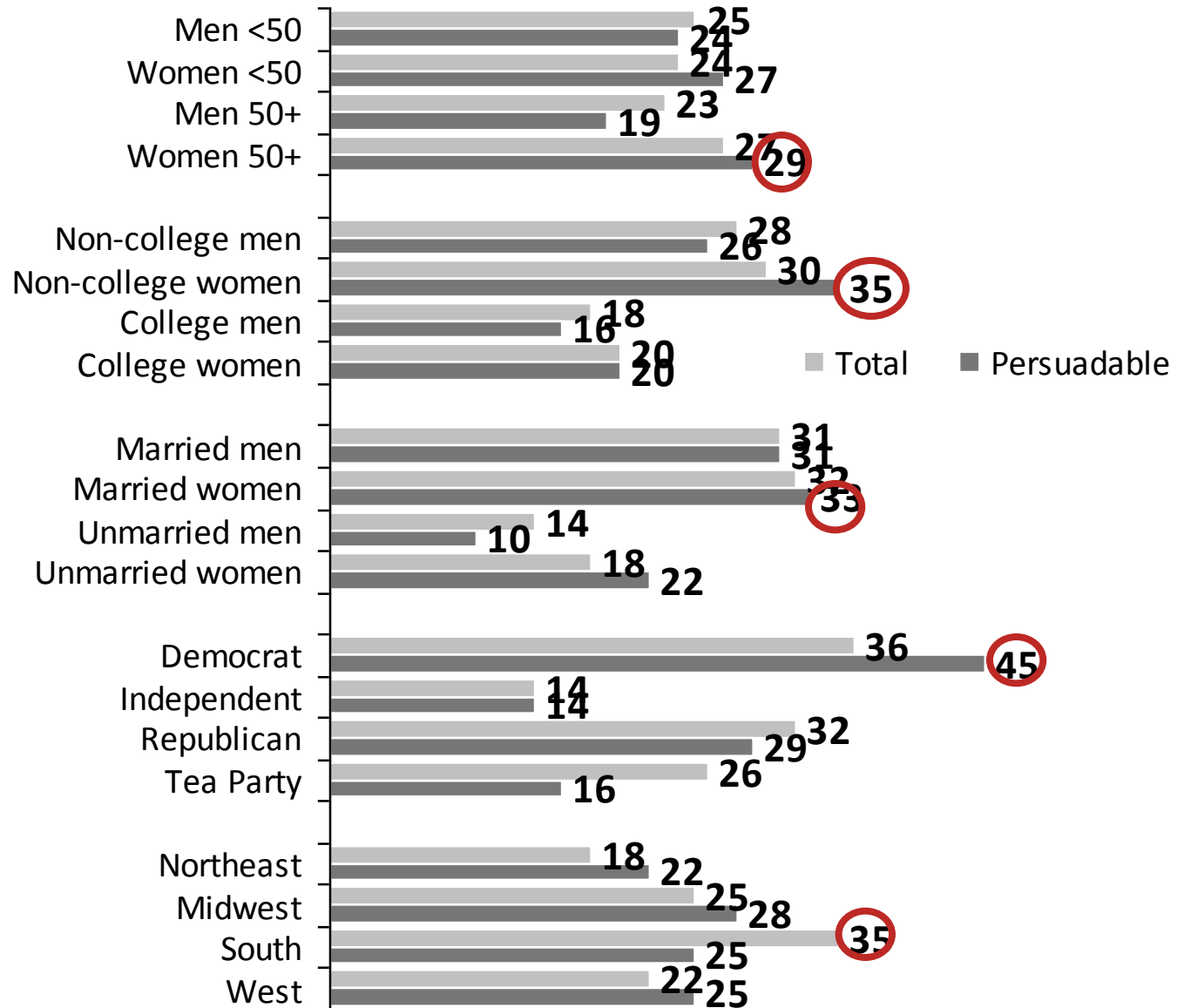
Messaging Do's and Don'ts

| DO | DON'T |
|---|---|
| Invoke themes of protection from physical harm. | Forget that invoking protection from economic harm, while important, also raises the specter of (perceived) recent regulatory failures. |
| Emphasize the need for accountability on the part of big business and government. Use language of openness and transparency. | Claim the mantle of government or underestimate level of skepticism toward government. |
| Specify areas for greater regulation; identify the bad actors—Wall Street, big corporations, oil and gas companies, politics, lobbyists and the special interests, credit card companies. | Frame the need for greater regulation in general terms. |
| Build on populist anger. | Assume that populist anger automatically accrues to our benefit; much of that anger is directed equally at Wall Street and government. |
| Recognize that voters have come to see government as inefficient at best and too tied to politics and the special interests, verging on corrupt at worst. | |
| Acknowledge past shortcomings when outlining the collective successes of regulations in our regulatory history. | Over-claim regarding the success of previous and existing regulations or use absolutist language in describing regulation's ameliorative powers. |
| Talk about efforts to streamline regulations. | Defend politicians, government, and the status quo. |
| Invoke President Obama. | Use a chronological referent. |
| Say that hardworking American families need greater government regulation of big business. | Include small businesses in the dialogue except among very specific audiences, and even then recognize the limitations of this frame as voters are very protective of small business. |

Appendix A

The profile of the persuadable voter is an older, non-college educated woman; more Democratic or independent than Republican; and less likely to be living in the South than voters overall.

Profile of the Persuadable





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