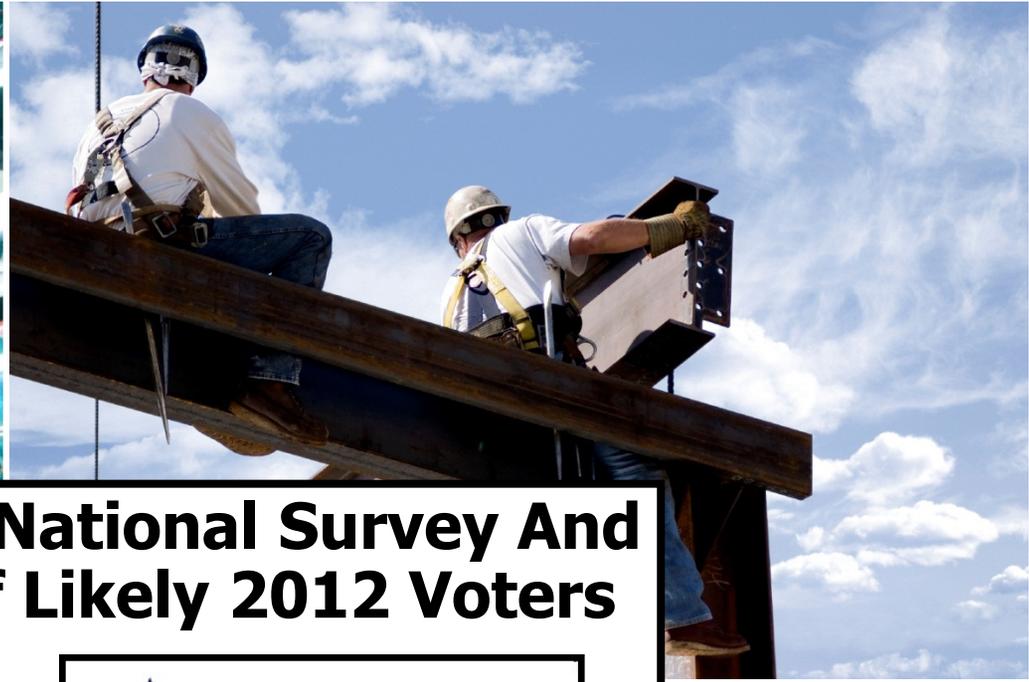
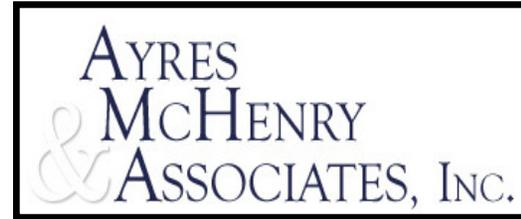


ALLIANCE FOR  
american  
manufacturing



## Findings From A National Survey And Focus Groups Of Likely 2012 Voters



# Key Findings

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- Voters See A Deteriorating Economic Situation
- They Continue To Rank Jobs, Specifically In Manufacturing, As Their Top Priority For Washington (Even Over The Deficit)
- But Even Fewer Than Last Year Think Anyone In Washington Is Doing Anything To Create And Preserve Manufacturing Jobs
- Voters See Manufacturing As Crucially Linked To Our Economic Strength
- Voters Are Even More Positive About U.S. Manufacturing Than Last Year, And Just As Negative About China
- Fewer Believe The U.S. Has The World's Strongest Economy, But Voters Continue To Believe The U.S. Can And Should Regain Its #1 Status
- Americans Overwhelmingly Support A National Manufacturing Strategy
- Some Of The Most Popular Proposals Include:
  - Incentives For R&D Used To Make Products Here
  - Cracking Down On Unfair Trade, Specifically With China
  - Stopping Tax Breaks For Outsourcing

# Methodology

## 2011 Research

### ❖ Focus Groups:

- 8 groups in May 2011—Columbus, OH, Manchester, NH, Sunnyvale, CA, and Greenville, SC
  - 2 of Likely Republican Primary Voters in SC and NH
  - 2 of Democrats and Independent Voters in SC and NH
  - 2 of swing voters in CA, dependent on hi-tech manufacturing
  - 2 of swing voters in OH, divided by dependence on manufacturing

### ❖ National Poll:

- 1,202 Likely 2012 General Election Voters—conducted June 14-19, 2011
- Margin Of Error +/- 3.1% (Higher For Subgroups)

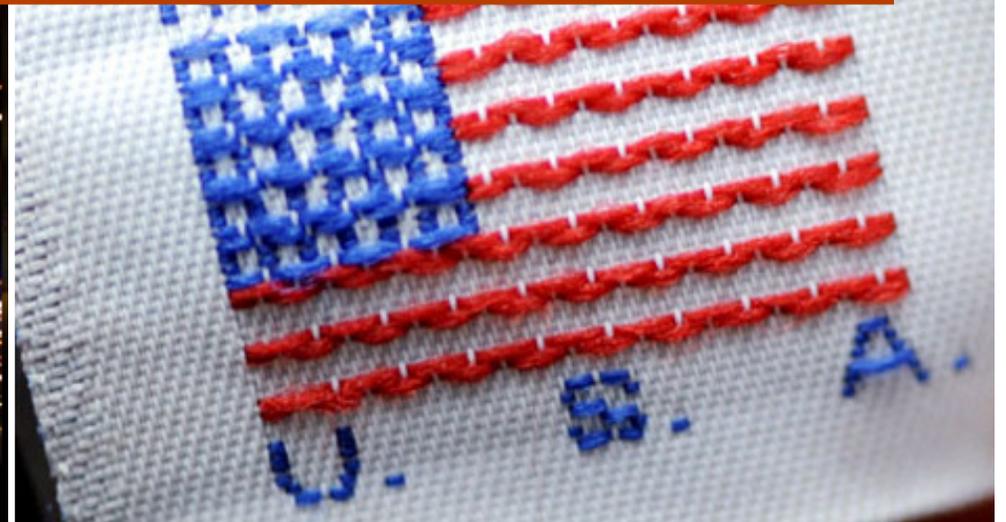
## 2010 Research

- ### ❖ Focus Groups:
- 6 groups of swing voters in March 2010—Richmond, VA, Chicago, IL, and Los Angeles, CA, divided by dependence on manufacturing

- ### ❖ National Poll:
- National Survey of 1,000 Likely 2010 Voters, April 2010

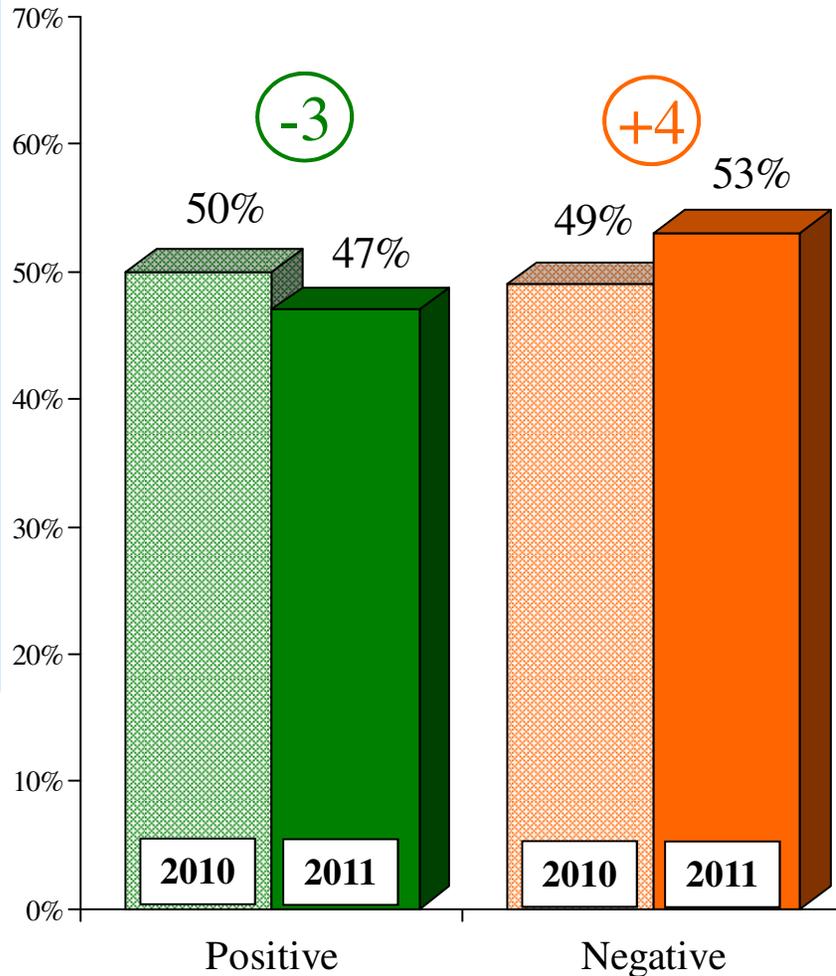


**Voters Feel Worse Economically,  
Worrying About Gas Prices, The Deficit  
And Manufacturing Jobs**

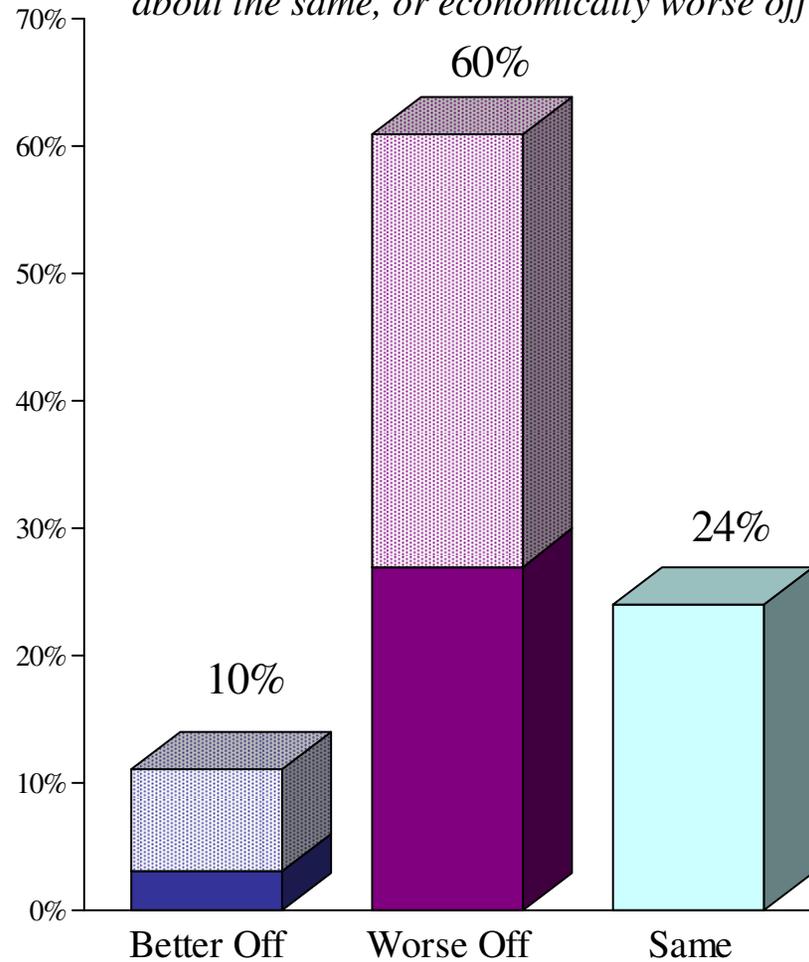


# A Majority Now Feel Negatively About Their Economic Situation And Even More Feel It Will Be Worse For Their Kids

*How would you rate your personal economic situation?*



*Economically speaking, do you think the next generation will be better off than you are, about the same, or economically worse off?*



*Lighter shading indicates weaker intensity*

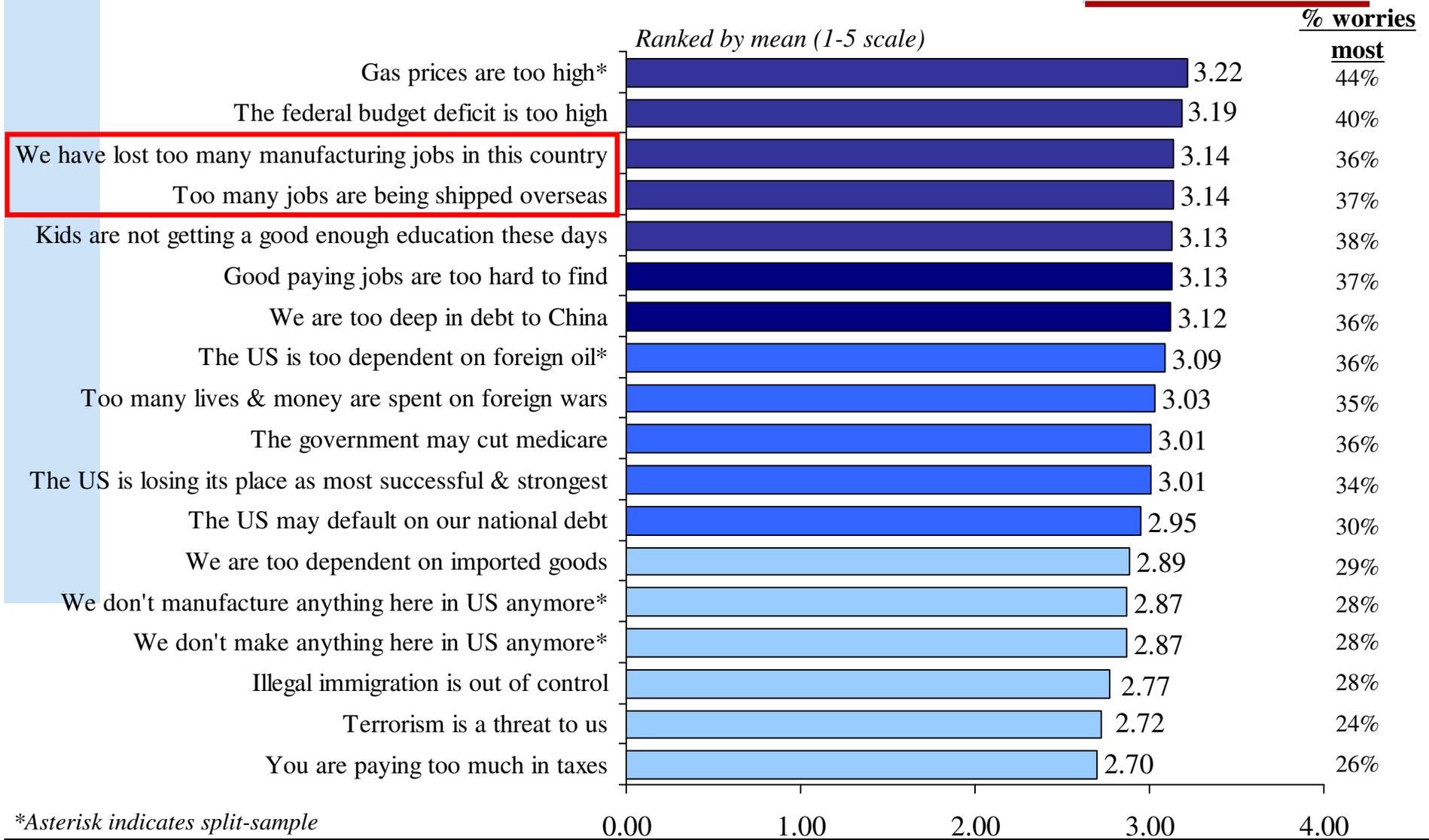


# Focus Group Participants' Concerns Centered On The Economy And Job Loss

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- There are people leaving all the time.... The economy, they can't get jobs. (OH Non-MFG Male)
- We need the jobs and we need the people working. When they leave it really hurts a lot of people... it really is important to keep the companies going. (CA High Tech Female)
- I just see store after store closing and business after business closing. You [go] down the street one day and there are several businesses. The next day, you go down and there are fewer. (NH GOP Female)
- At this point we need to do something to stop hemorrhaging all of those jobs. (SC DEM/INDEP Male)

# Voters Are Most Concerned About Gas Prices, The Deficit, And Jobs, Specifically Manufacturing Jobs



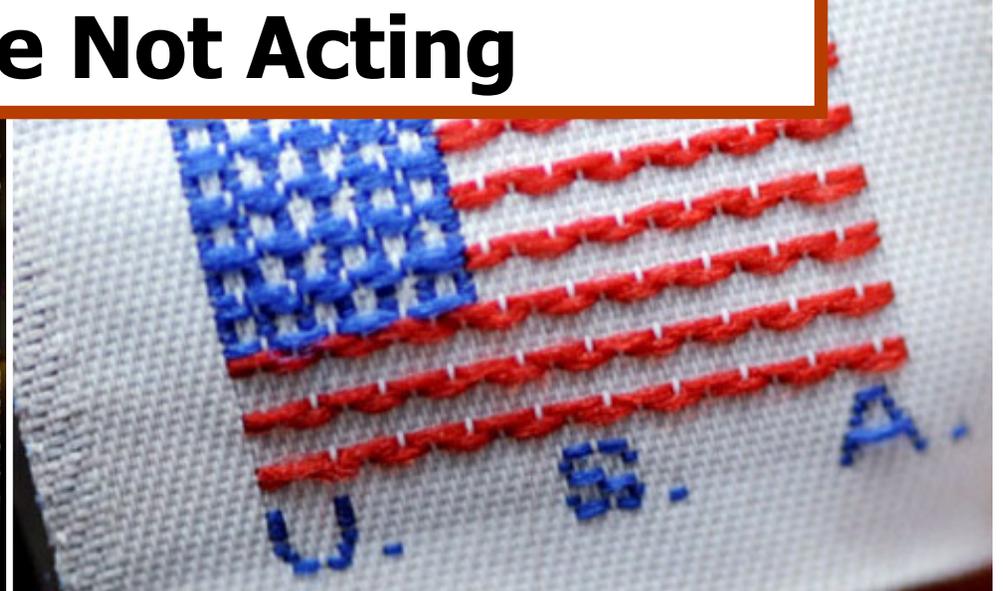
# Across The Country, Voters See Manufacturing As One Of The Industries Hardest Hit By The Recession

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- Consumer goods, manufacturing, it doesn't exist in the United States anymore. (OH Non-MFG Male)
- There are no manufacturing jobs anymore. (CA High Tech Female)
- The people that work in manufacturing have lost their jobs because most of that work is now done in other countries. You are going to have some people with really terrific jobs and ....a mass of people still without jobs... income and benefits (NH GOP Female)
- There is hardly anything made in the U.S. That comes as no surprise. Where is the manufacturing in this country? (NH DEM/INDEP Female)



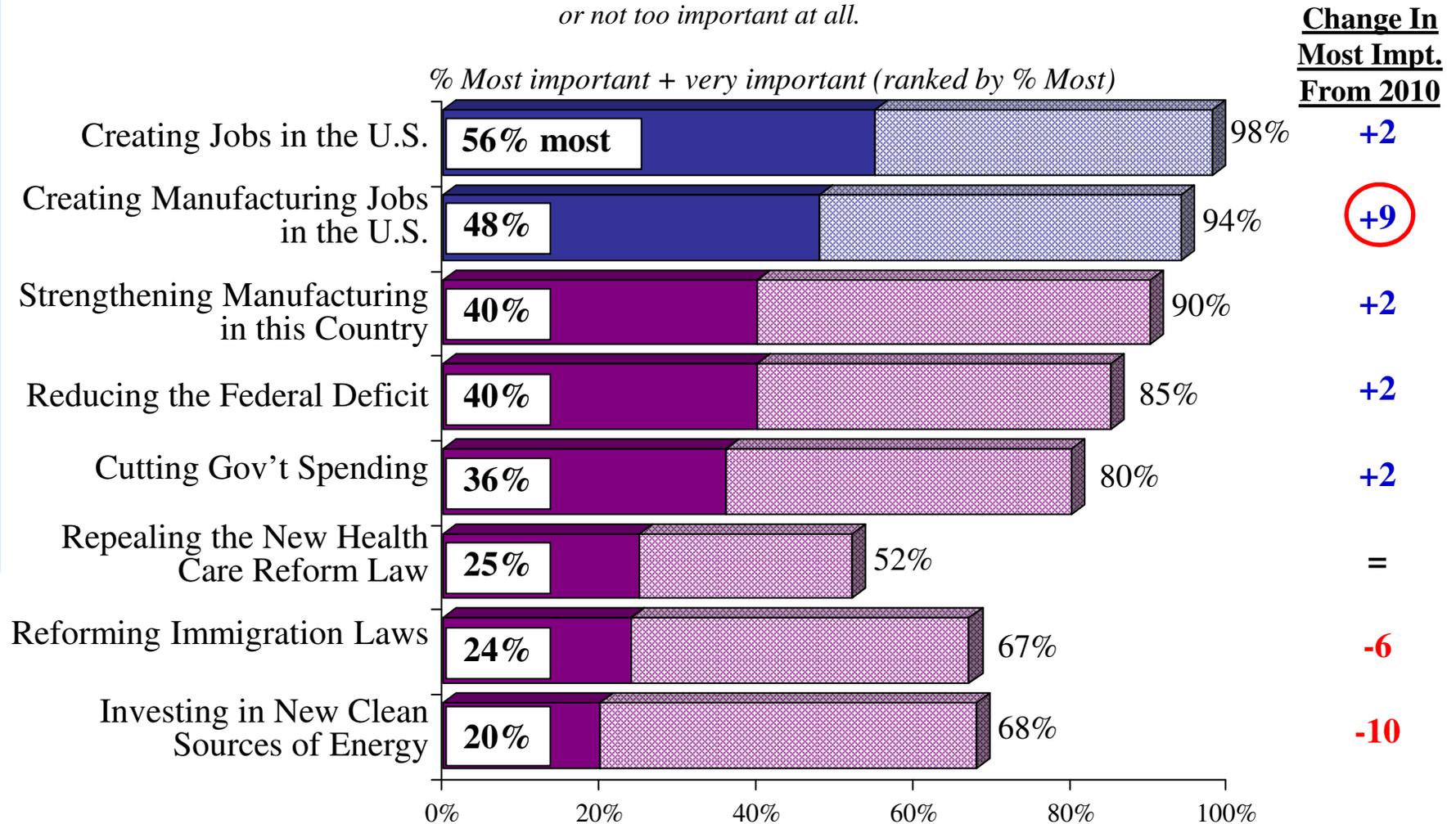
**Voters Want To Make  
Manufacturing Jobs A Priority, But  
Are Even More Certain That Political  
Leaders Are Not Acting**



# Voters Want Washington To Focus On Creating Jobs, Specifically Manufacturing Jobs

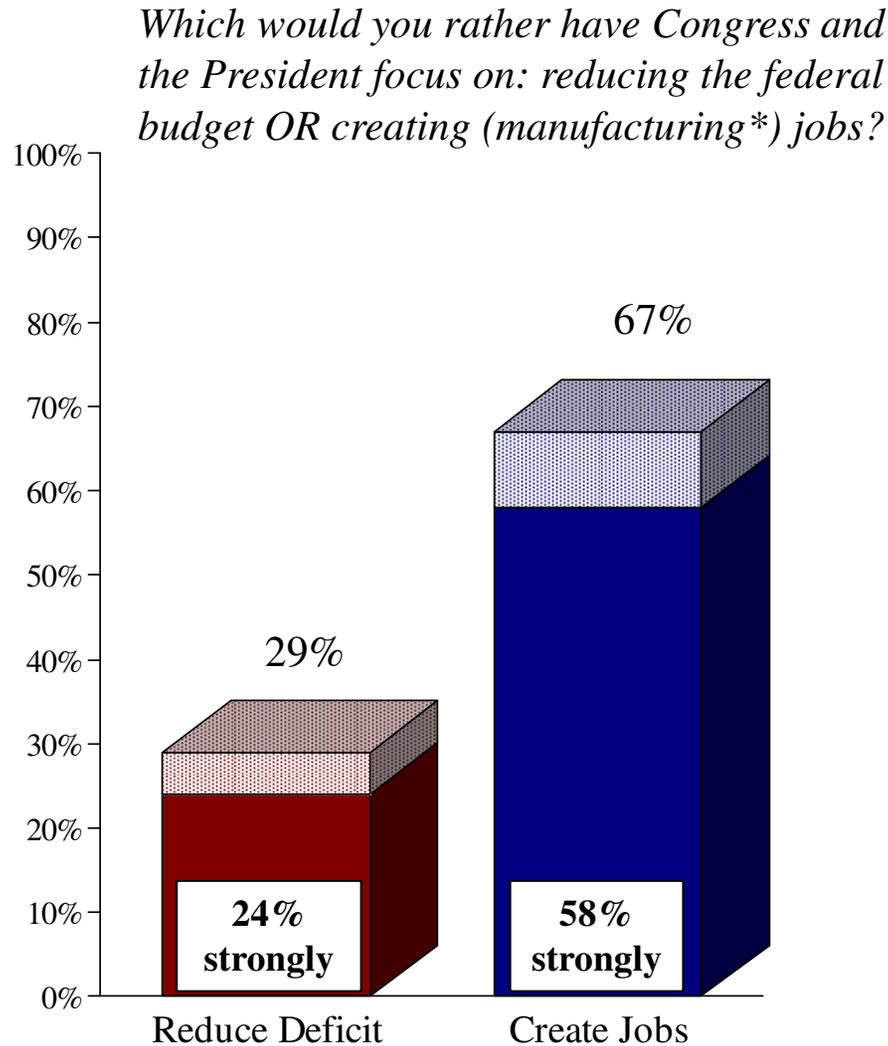
This Sentiment Is Even More Intense Than It Was In 2010

*I'm going to list some things Congress and the President could work on this year. After each, please tell me whether you think that particular issue is one of the most important things for [them] to work on, very important, somewhat important or not too important at all.*



# Voters Prefer Washington Focus On Jobs Over The Deficit By Two-To-One

Even Among GOP Primary Voters, A Majority Put Jobs Over The Deficit



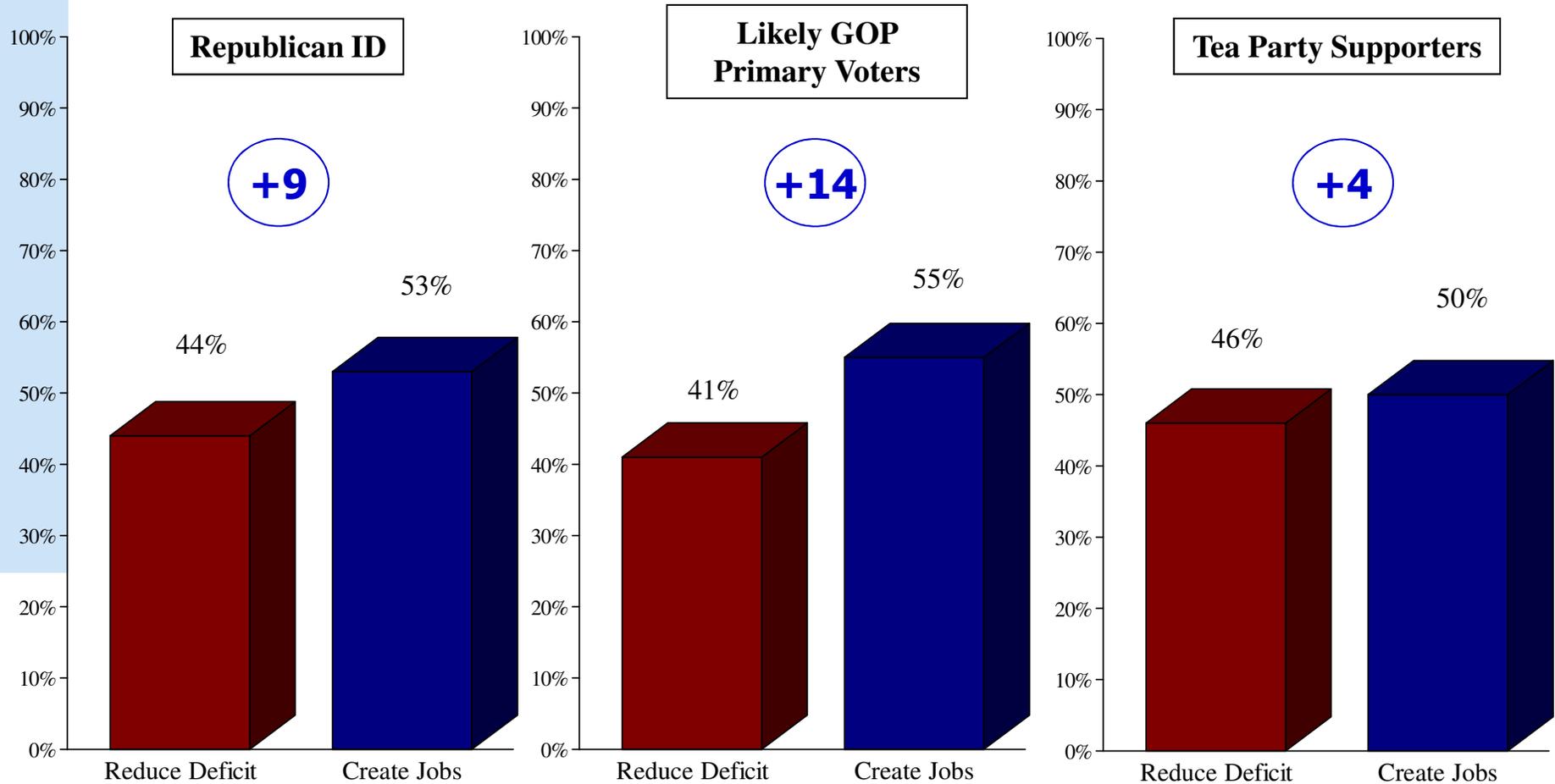
	Reduce Deficit	Create Jobs
Democrat ID	16%	80%
Independent ID	28%	67%
Republican ID	44%	53%
Likely GOP Pri Voters	41%	55%
Tea Party Supporters	46%	50%
Tea Party Opponents	21%	76%
Union HH	24%	73%
Non-Union HH	29%	66%
Young women	23%	73%
Young men	32%	66%
Older women	26%	68%
Older men	32%	64%
Upper class	42%	56%
College middle class	32%	64%
Non-college middle class	23%	73%
Lower	24%	72%
Northeast Region	25%	73%
Midwest Region	30%	65%
South Region	29%	66%
West Region	30%	66%

*\*Italics indicate split-sample – “create jobs” vs. “create manufacturing jobs”*



# Even Among Republicans, GOP Primary Voters, And Tea Party Supporters, A Majority Put Jobs Over The Deficit

*Which would you rather have Congress and the President focus on: reducing the federal budget OR creating (manufacturing\*) jobs?*



*\*Italics indicate split-sample – “create jobs” vs. “create manufacturing jobs”*



# Few Believe Their Leaders Are Doing Anything To Improve The Current State Of Manufacturing

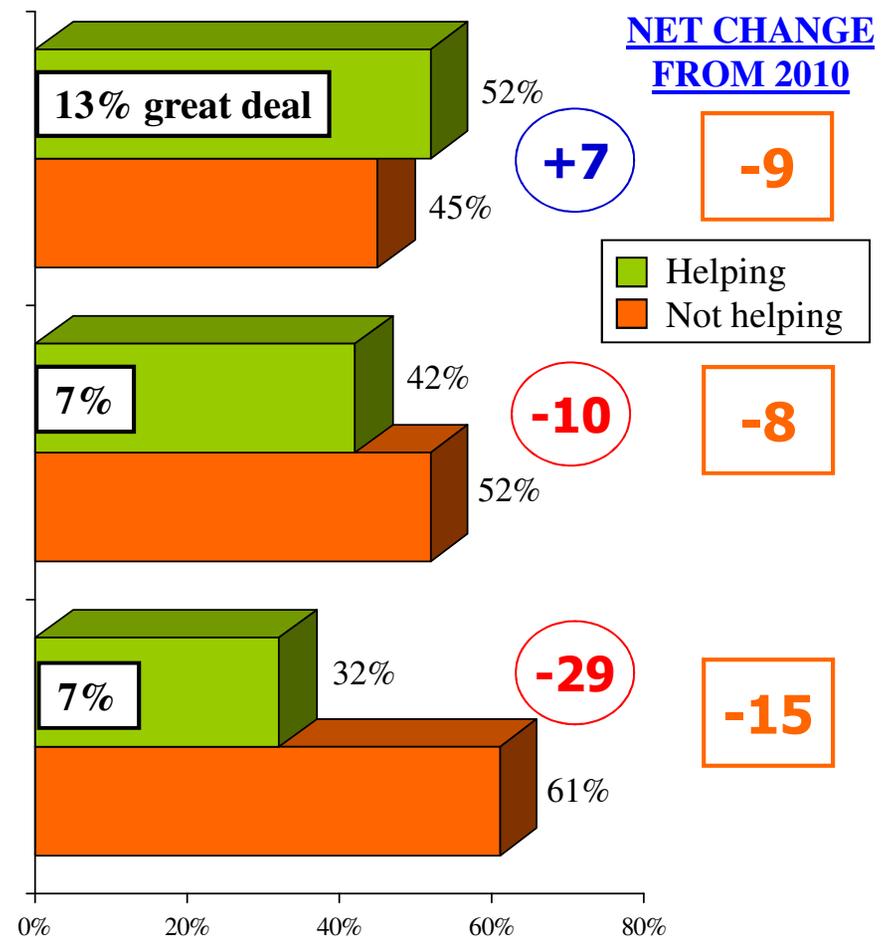
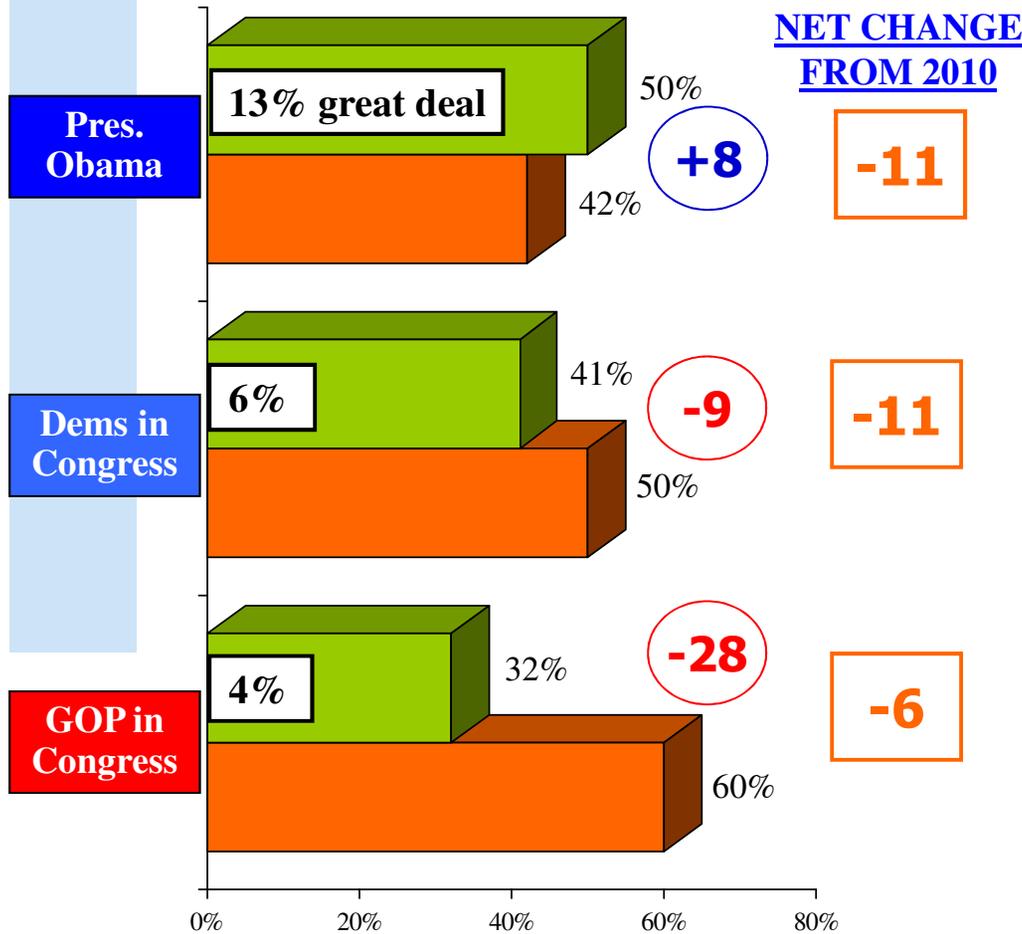
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- Right now I don't see anybody doing anything (OH Non-MFG Female)
- The bad things originated in the last 10 or 15 years. No one has done anything about it. Everybody has been complaining that it has been .....getting worse. (CA High Tech Male)
- [Politicians] aren't going to talk about manufacturing they are mostly going to talk about the economy, the war and anything else except manufacturing. (SC Dem/Ind Female)

# Last Year, Relatively Few Felt Washington Was Doing Much On Jobs Or Trade – And It's Only Getting Worse

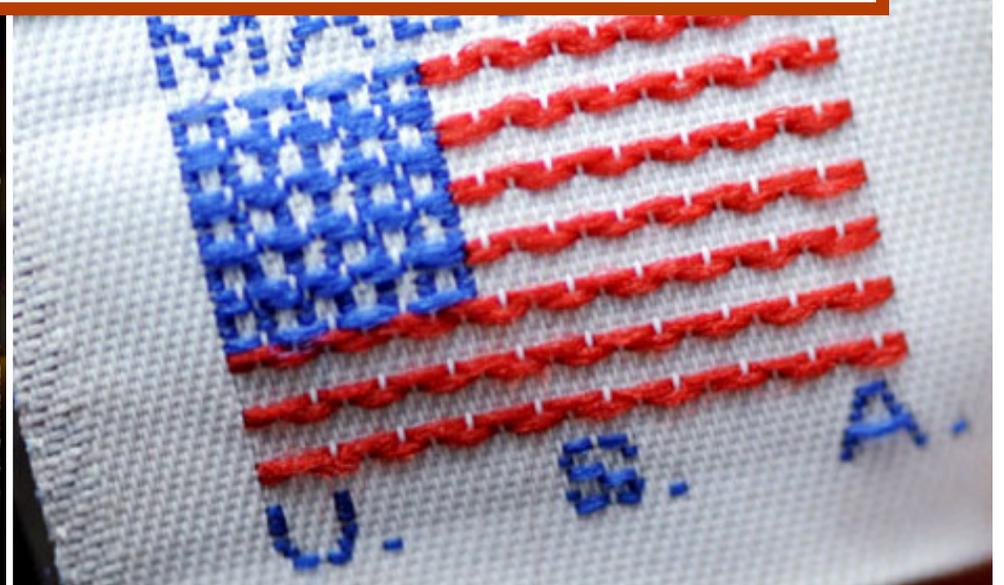
Do you think \_\_\_ is/are doing a great deal to help create American manufacturing jobs, some, not too much, or nothing at all?

Do you think \_\_\_ is/are doing a great deal to enforce fair trade with our trading partners, some, not too much, or nothing at all?





# Voters See Manufacturing As Crucially Linked To Our Economic Strength



# Focus Group Participants Contend Manufacturing Is Inextricably Linked To Economic Strength

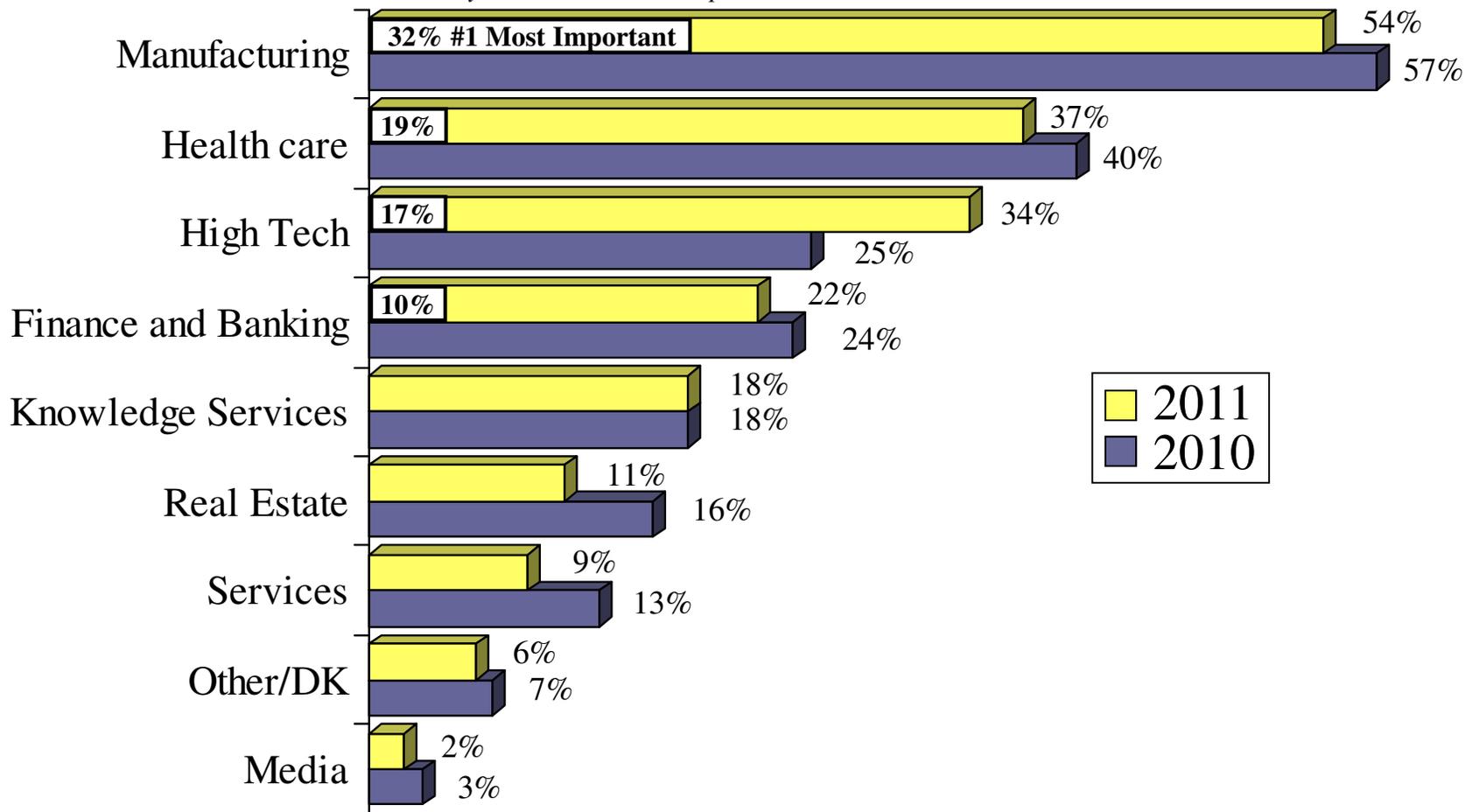
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- Without manufacturing you don't have that base [of support] that contributes to every aspect of life... it supports community, it supports family, provides security and .... provides a bedrock we have to rely [on for] ... military. (SC GOP Male)
- We become a third world country if we lose manufacturing. (OH Mfg Male)
- I heard it said years ago that true wealth is created from manufacturing ... We have lost so much of it. (NH Dem/Ind Male)

# Manufacturing Is Judged Most Important In Determining Our Economic Strength

*Which of the following industries is most important to the overall strength of the American economy?*

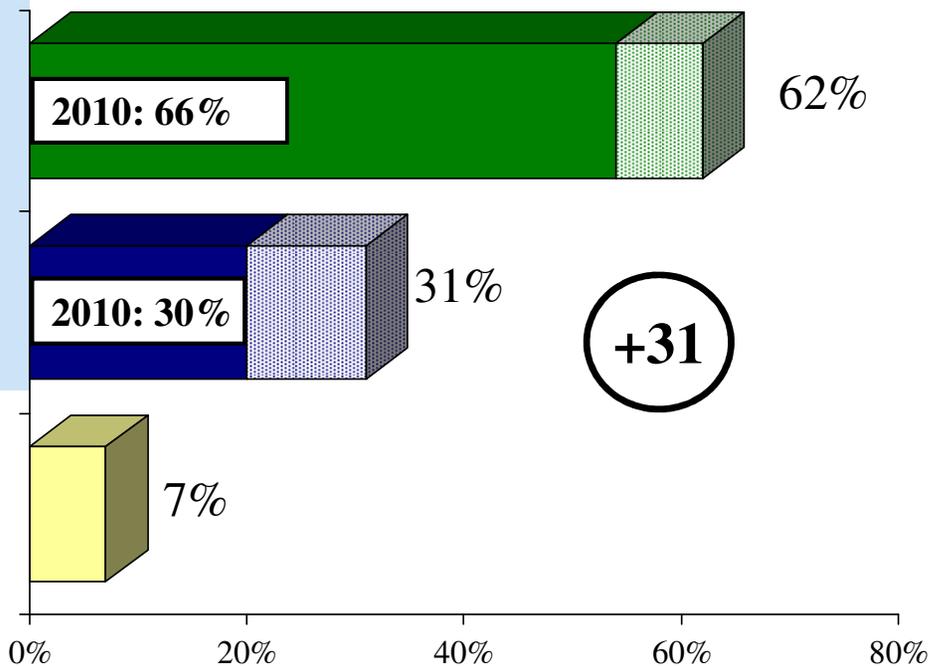
*Ranked by % 1<sup>st</sup> & 2<sup>nd</sup> Most important*



# Voters Reject The View That Other Sectors, Like Services Or Technology, Can Replace Manufacturing

Which comes closer to your point of view?

- Manufacturing is a critical part of the American economy and we need a manufacturing base here if this country and our children are to thrive in the future.
- The strength of the American economy is innovation and competition – and if manufacturing leaves, we will move into new areas like high-tech or services which will take its place in the future.



Lighter shading indicates weaker intensity

A Majority Agrees Across Demographics		
	Need Manufact'g	New Areas Replace
Democrat ID	62%	33%
Independent ID	62%	30%
Republican ID	62%	30%
Likely GOP Pri Voters	61%	30%
Manufacturing HH	60%	37%
Non-Manufacturing HH	62%	30%
Young women	65%	27%
Young men	59%	37%
Older women	60%	29%
Older men	64%	30%
Upper class	58%	38%
College middle class	57%	38%
Non-college middle class	66%	25%
Lower class	64%	29%
Northeast region	62%	35%
Midwest region	62%	26%
South region	62%	31%
West region	60%	33%



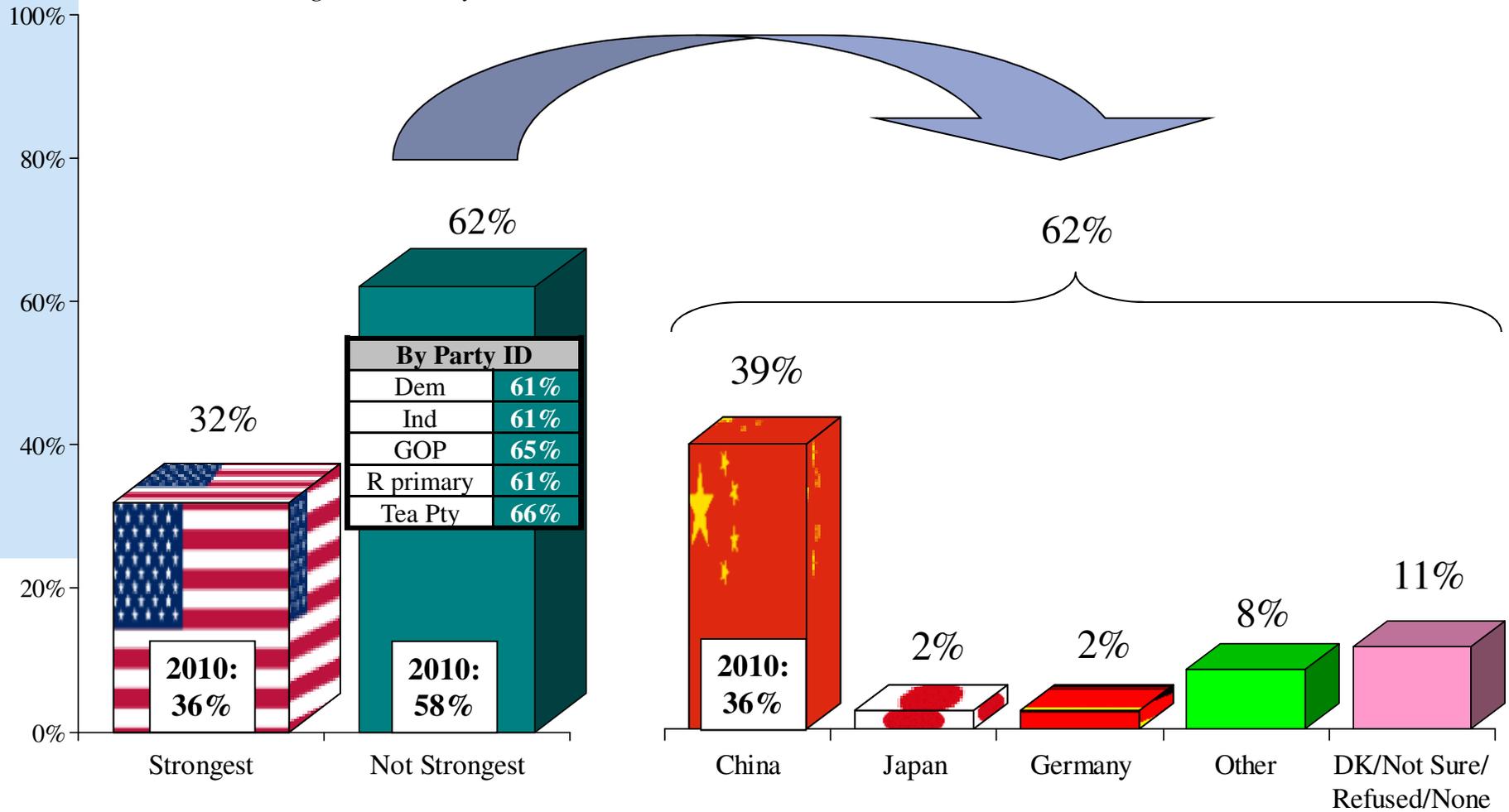
**Voters Feel We Can, And Must,  
Regain Our Status As The World's  
Economic Leader**



# Now Less Than A Third Believe We Have The World's Strongest Economy, With More Volunteering China For That Role

*Do you think the United States does have the strongest economy in the world or does the US not have the strongest economy in the world?*

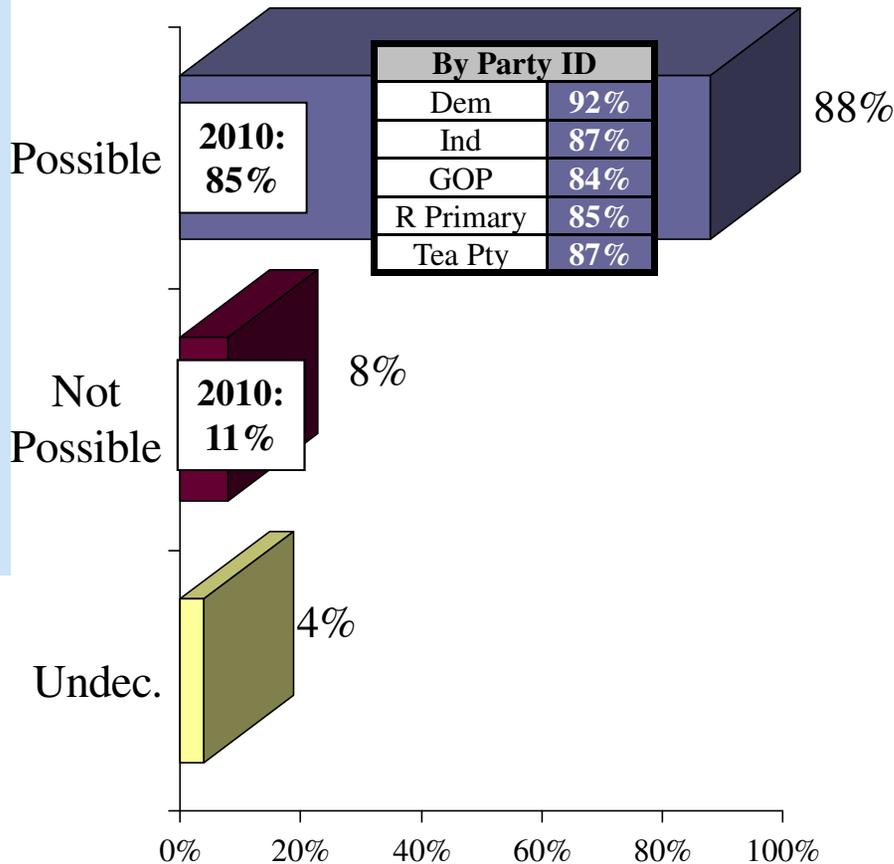
*[If no:] Which country do you think has the strongest economy in the world? [Open Ended]*



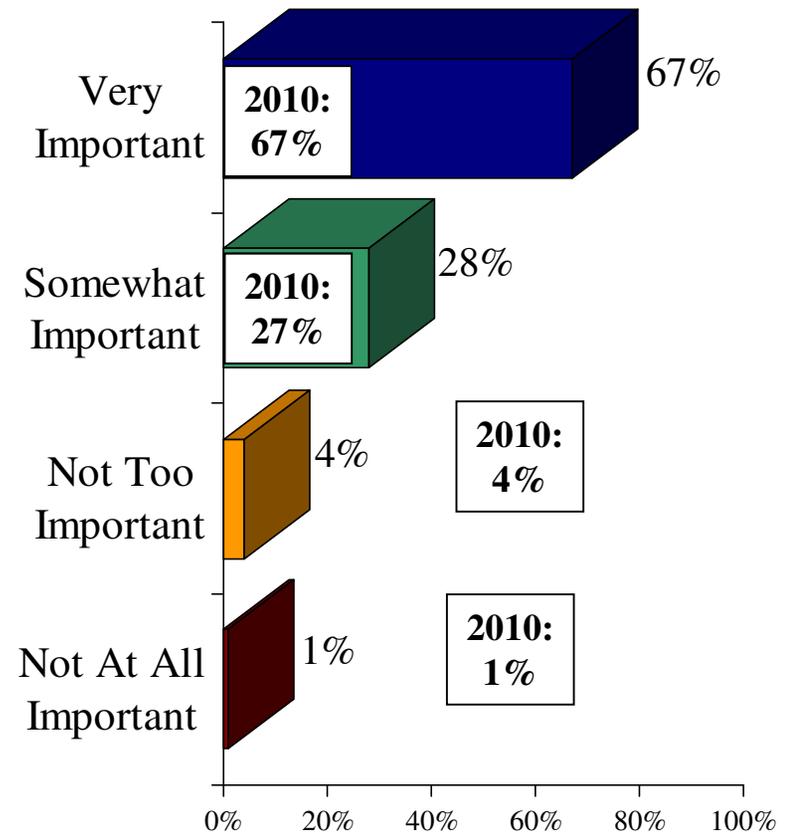
# Voters Overwhelmingly Believe It Is Both Possible And Important For The U.S. To Have The World's Top Economy

Among those who believe the US does *not* have the strongest economy in the world:

*Is it possible for the United States to have the strongest economy in the world?*

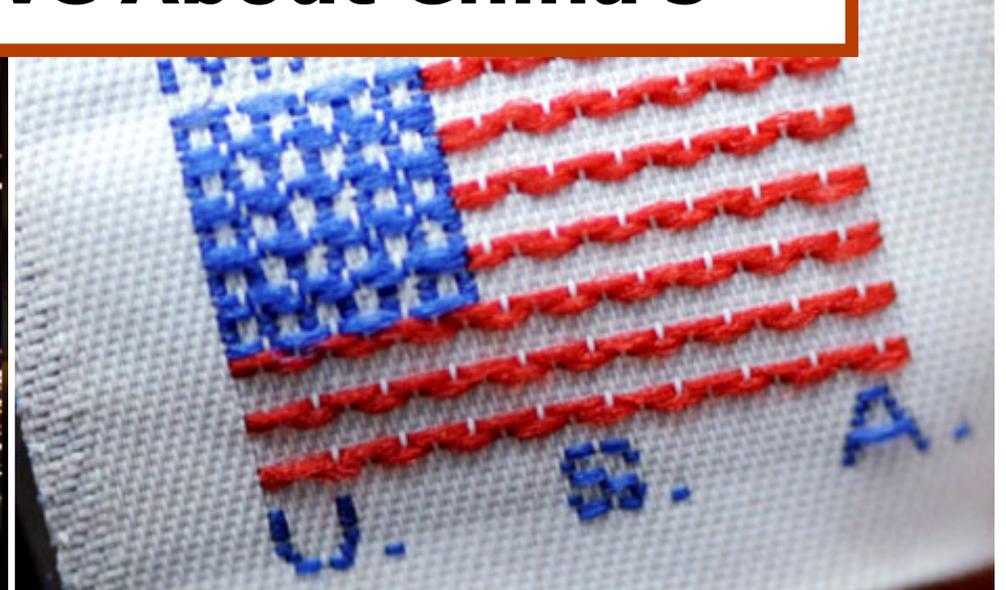


*How important is it to you for the United States to have the strongest economy in the world?*



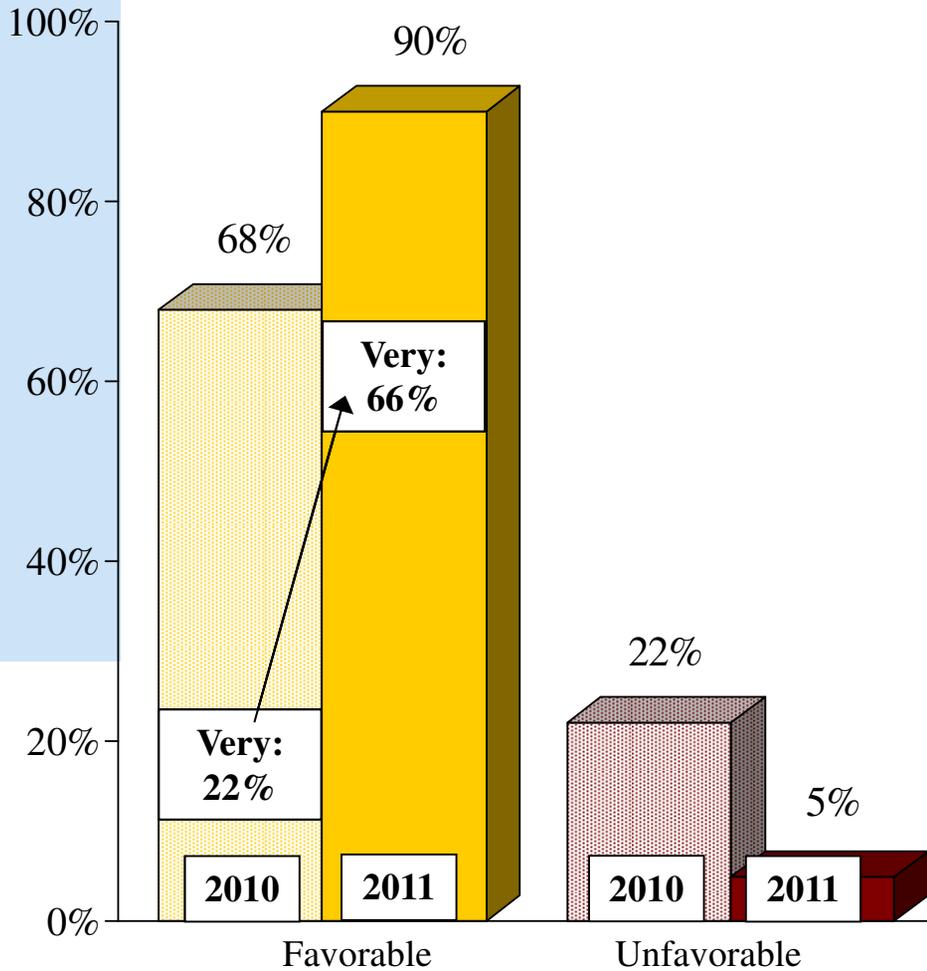


**Voters Are More Positive About U.S. Manufacturing Than Last Year, And Just As Negative About China's**

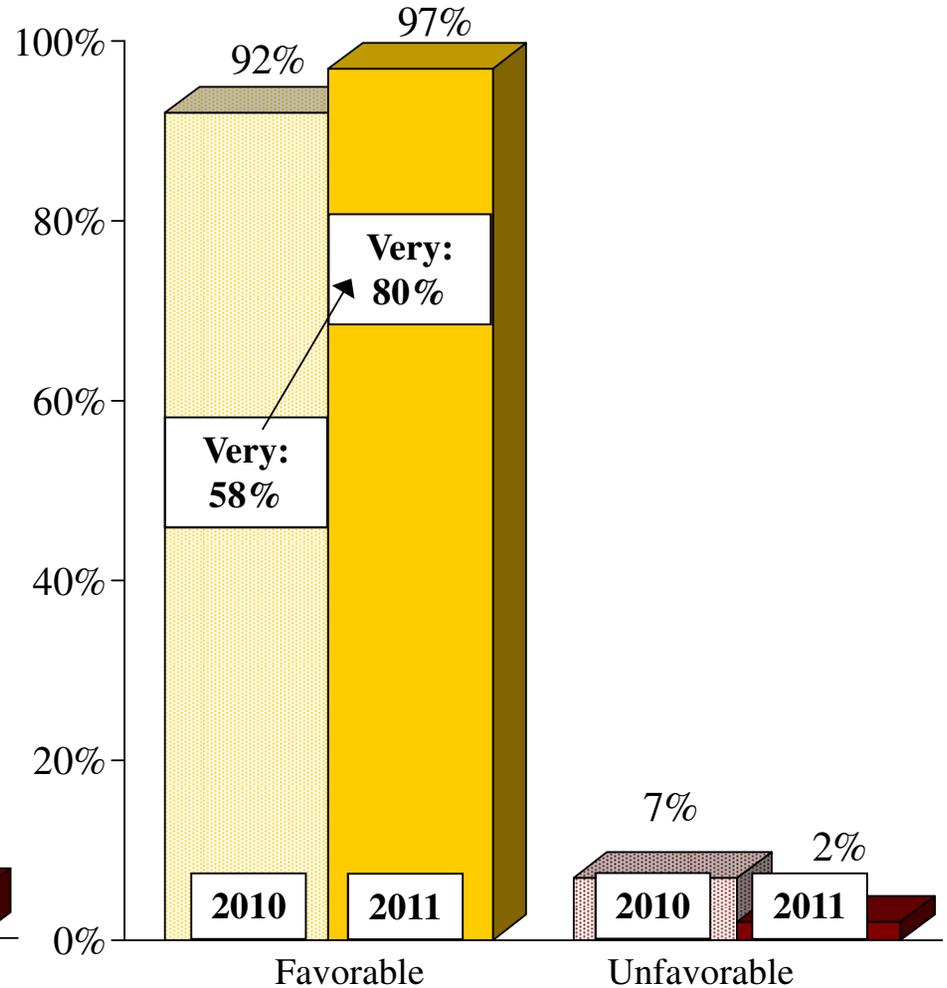


# Voters View American Manufacturing And Its Products More Favorably Than In 2010

American Manufacturing Companies  
Favorability



Manufactured Goods Made In America  
Favorability



# The Negative Feelings About The Auto Bailout We Heard In Last Year's Groups Were Erased And Almost Reversed

## 2010 Focus Groups

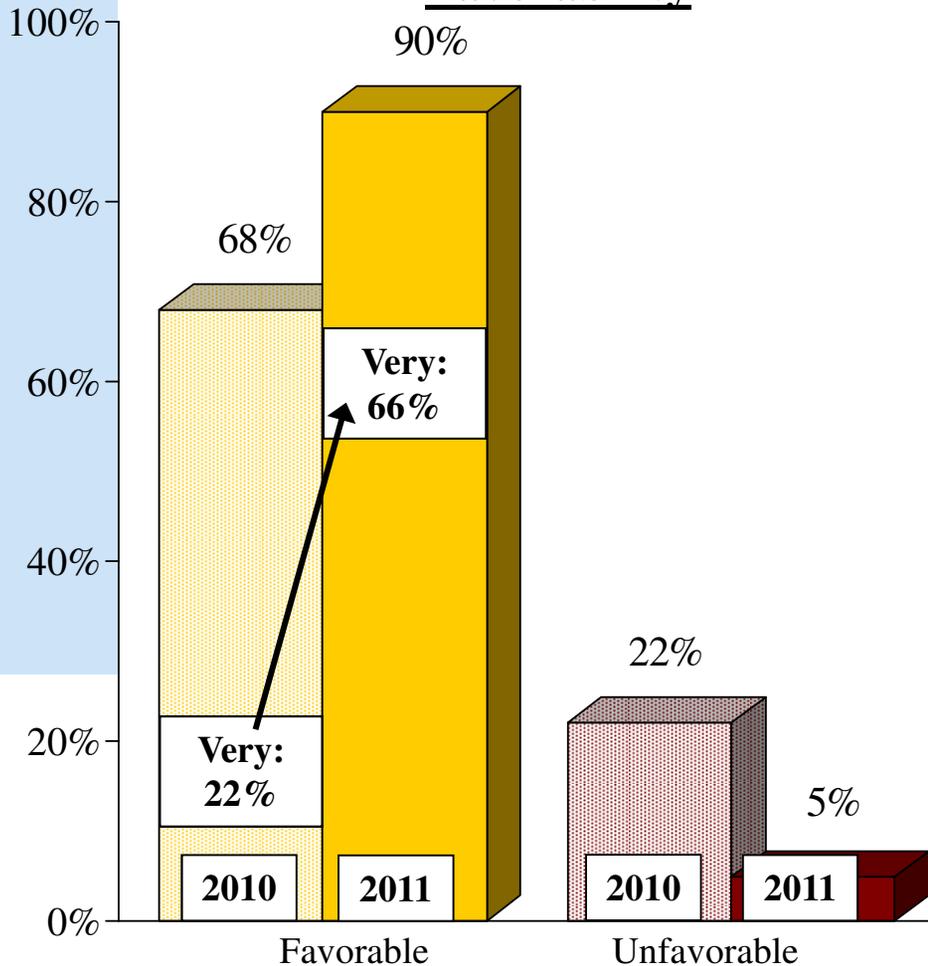
- Look at the automobile companies ... I'm not sure why they got it, but they got a bailout and then they gave bonuses to everybody. (IL Male)
- I don't want to see another repeat of the disaster of the government bail out...That was a fiasco. (VA Female)
- I don't trust the government so why are they picking one business over another? Can they help my business? What about me? (CA Female)

## 2011 Focus Groups

- We are hiring again and we just announced a plant expansion in Lexington, another 250 jobs. You see the auto industry is picking up some. Ford has good sales. (SC GOP Male)
- Hearing the news about GM last night, it affected [me]. A month ago, I probably would have said "no" to taking that money and...throwing it into manufacturing, when we're so far in debt... that was like a glimmer of huge hope to hear that news, that [the] company is rebounding. (OH MFG Female)
- Yes, the government helped. And that's what's so cool, to know the government bailed them out. Everybody was like, "It's not going to work." And it worked. (OH MFG Female)
- GM did come back and Ford is making new cars that don't break down all the time. They've improved their process and designs so they are building better cars. (CA High Tech Female)

# This More Favorable View Of American Manufacturing Companies Extends Across Demographics

**American Manufacturing Companies Favorability**



	2011 Fav	2010 Fav	NET Change
<b>TOTAL</b>	<b>90%</b>	<b>68%</b>	<b>+22</b>
Democrat ID	91%	65%	+26
Independent ID	89%	72%	+17
Republican ID	88%	66%	+22
Tea Party Supporters	90%	68%	+22
Tea Party Opponents	88%	71%	+17
Manufacturing HH	94%	73%	+21
Non-Manufacturing HH	89%	67%	+22
Young women	88%	70%	+18
Young men	92%	68%	+24
Older women	90%	62%	+28
Older men	89%	73%	+16
Upper class	90%	67%	+23
College middle class	88%	70%	+18
Non-college middle class	93%	67%	+26
Lower class	88%	69%	+19
Northeast region	90%	71%	+19
Midwest region	88%	67%	+21
South region	90%	65%	+25
West region	91%	70%	+21

## Participants See American-Made Products As Superior And Expressed A Preference For Them

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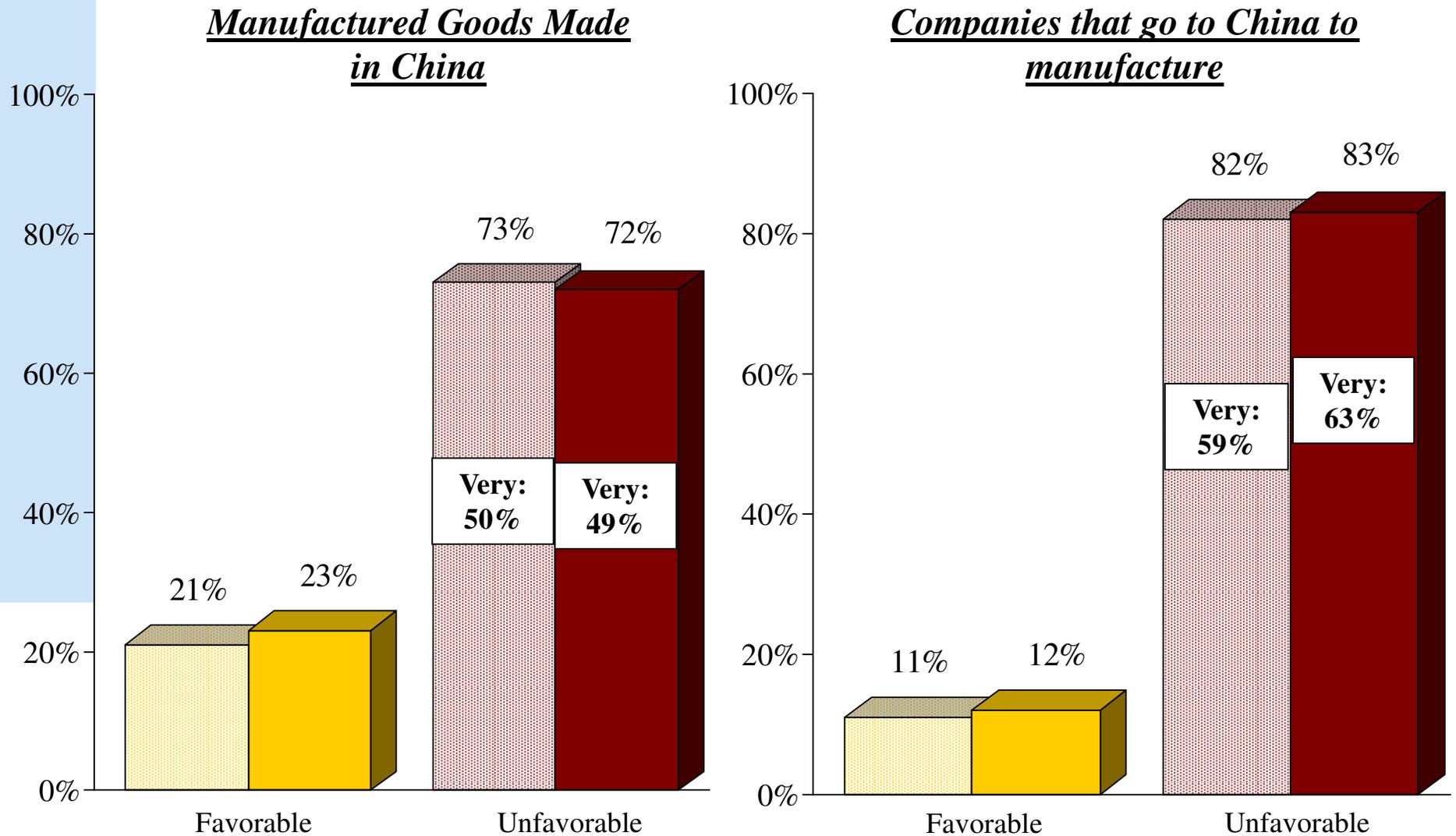
- I'd probably rather have brake pads and shoes installed in my car that were made in America, as opposed to, like, Mexico or China. When it comes to my personal safety, as well as my loved ones, you want the better product. (OH MFG Male)
- I don't think they are better or have more to offer than we do here. We have always taken pride in our work. (SC GOP Female)
- If there was a store that was all made in the U.S., you would find me there versus a Wal-Mart. (NH GOP Female)
- I would pay more for a quality hand tool made in America and isn't going to break apart when I am under the hood of a car. (SC GOP Male)
- It was better quality when it was made here. (SC DEM/INDEP Female)

# Participants Had Strong Negative Feelings About Chinese Imports And Trade Practices

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- There is no regulation. Look at China. Their lakes are polluted. Their air is polluted. They don't care. When I build a plant in China I don't have to build emission scrubbers into it. I don't have to worry about my waste products. I just dump them out the back door. (OH MFG Male)
- China has a reputation of using lead in the paint. I wouldn't let a child lick something made in China because I am afraid that their paint is full of lead. (CA High Tech Male)
- Say we have a pair of shoes that are made in China: you automatically say they are not that good. (SC GOP Male)
- China is flooding our markets with cheap products. (NH DEM/IND Female)

# Most Have Unfavorable Views Of Goods Made In China And Feel Even Worse About Companies Moving There



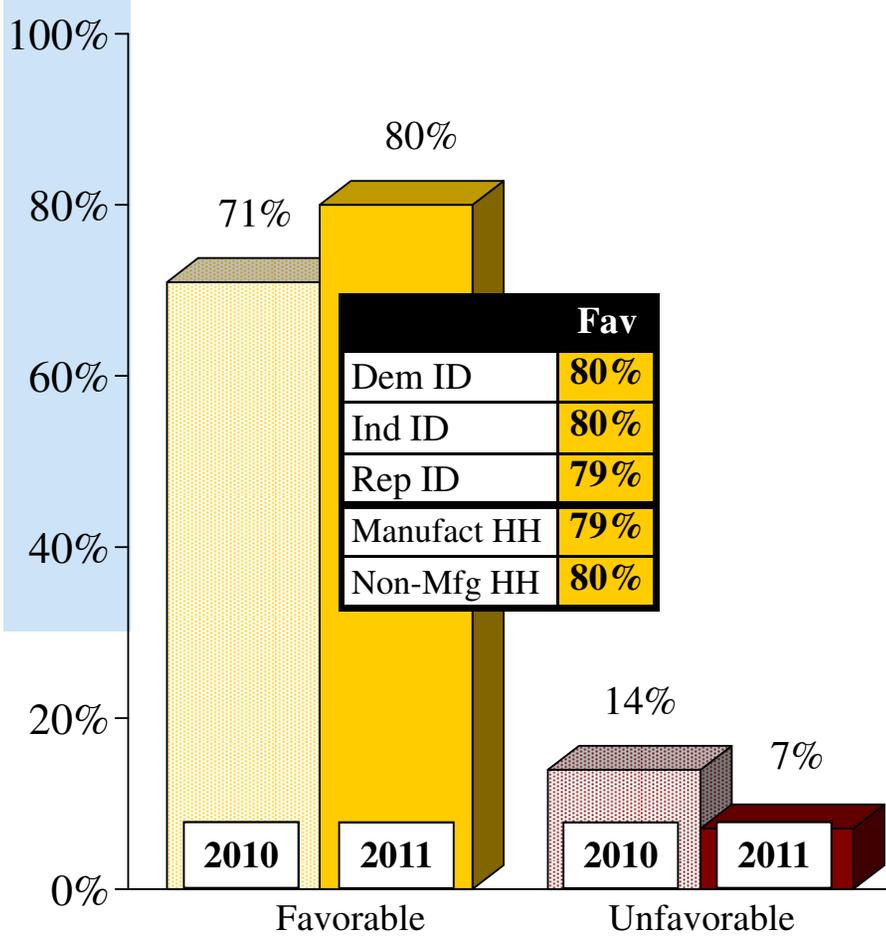


**Most Support Getting Tough With China And Others On Trade Along With Buy American Laws**

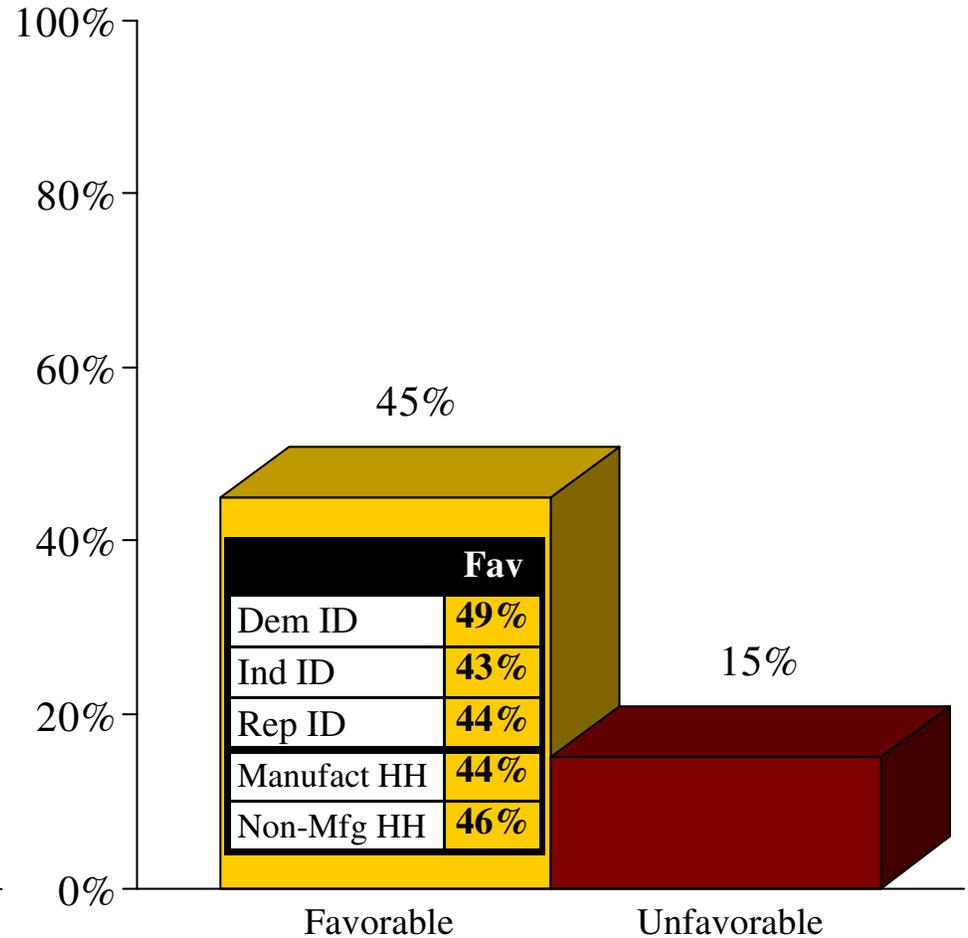


# Already Good Feelings About “Buy American” Intensified Further, And A Plurality Feel Favorably About Protectionism

**Buy American Policies Favorability**



**Protectionism/Trade Protectionism Favorability**



# Participants Were Supportive Of Buy American Policies, Particularly With Their Tax Dollars

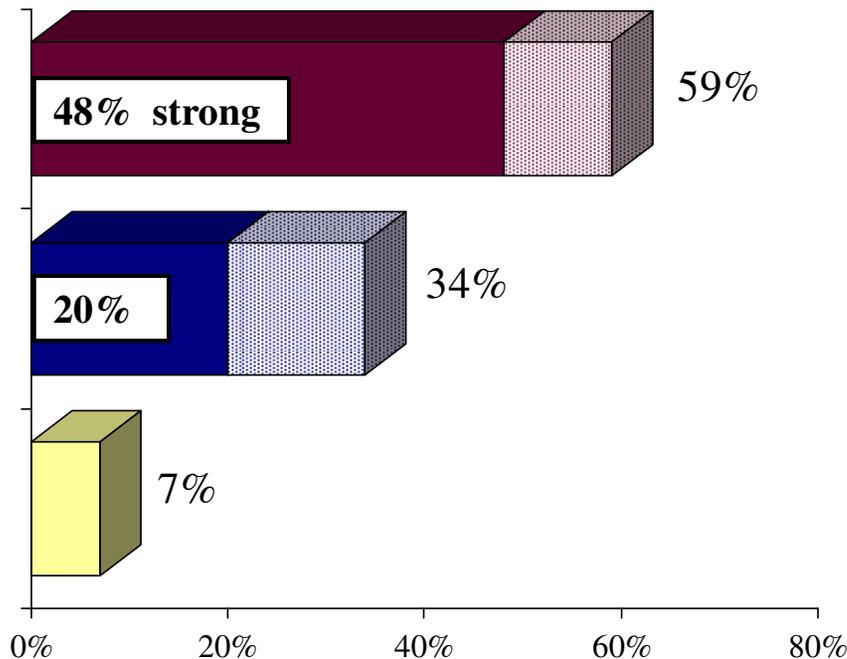
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- Yeah, if I'm spending government dollars we better be spending it on American products. (OH Non-MFG Male)
- We can't trust others to make our tanks and fighter jets and submarines. I wouldn't trust another country to make them. (NH GOP Female)
- If we are going to have federal projects, the federal dollars should not go overseas to buy things for us. (SC DEM/INDEP Female)
- I think that it seems logical that if the federal government is going to have to shell out money for something...if I'm going to pay taxes it makes more sense for it to go to someone who lives next to me to be employed and going to something that is good for my country. (CA High Tech Female)

# Across Demographics, Voters Favor Getting Tough With China Over Worrying About Our Debt Or A Trade War

Which comes closer to your point of view?

- We need to get tough with China and use every possible legal means to stop their unfair trade practices which will keep undermining our economy and taking away our jobs. We must get tough now.
- We need to be careful in our dealings with China because they own such a significant portion of our debt – and provoking a trade war with China will increase the prices of things we buy



	Get Tough	Tread lightly
Democrat ID	59%	35%
Independent ID	56%	35%
Republican ID	63%	32%
Likely GOP Pri Voters	65%	30%
Tea Party Supporters	64%	31%
Tea Party Opponents	58%	37%
Union HH	61%	33%
Non-Union HH	59%	34%
Young women	62%	34%
Young men	60%	36%
Older women	56%	33%
Older men	61%	33%
Upper class	58%	36%
College middle class	54%	39%
Non-college middle class	66%	27%
Lower	58%	36%
Northeast Region	60%	33%
Midwest Region	59%	33%
South Region	58%	36%
West Region	59%	32%

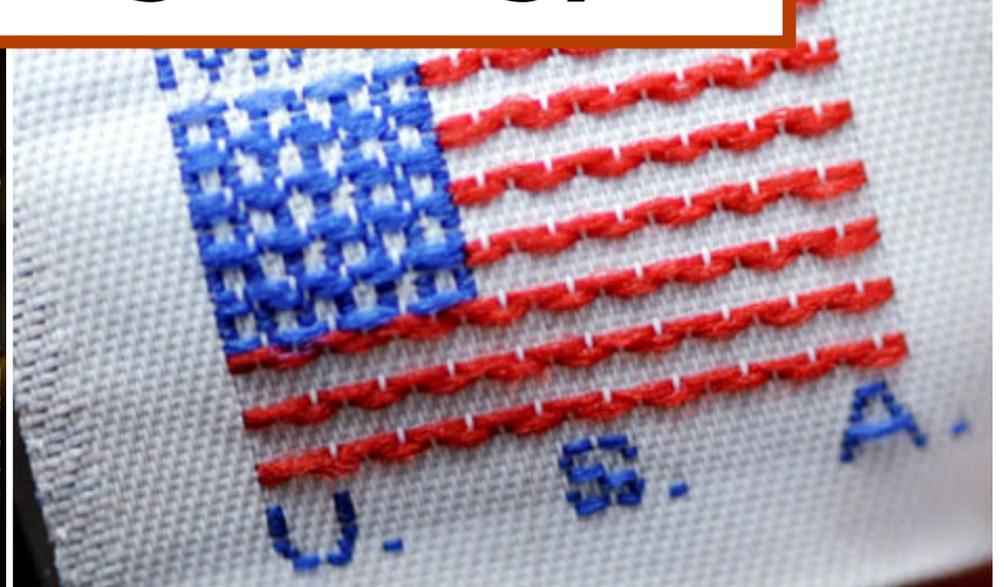
# Many Want To See The US Do A Better Job Of Enforcing Trade Agreements – Particularly With China

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- By nature no one likes to be taken advantage of. Right now I feel like we are being...taken advantage of by China and their policies. (SC GOP Male)
- Washington not holding China accountable. (OH Non-Mfg Female)
- The playing field isn't even, China is cheating. We are not doing a thing about it and it is scary. (SC GOP Female)
- We have to stand up for ourselves and stop letting others take advantage of us. (CA High Tech Male)



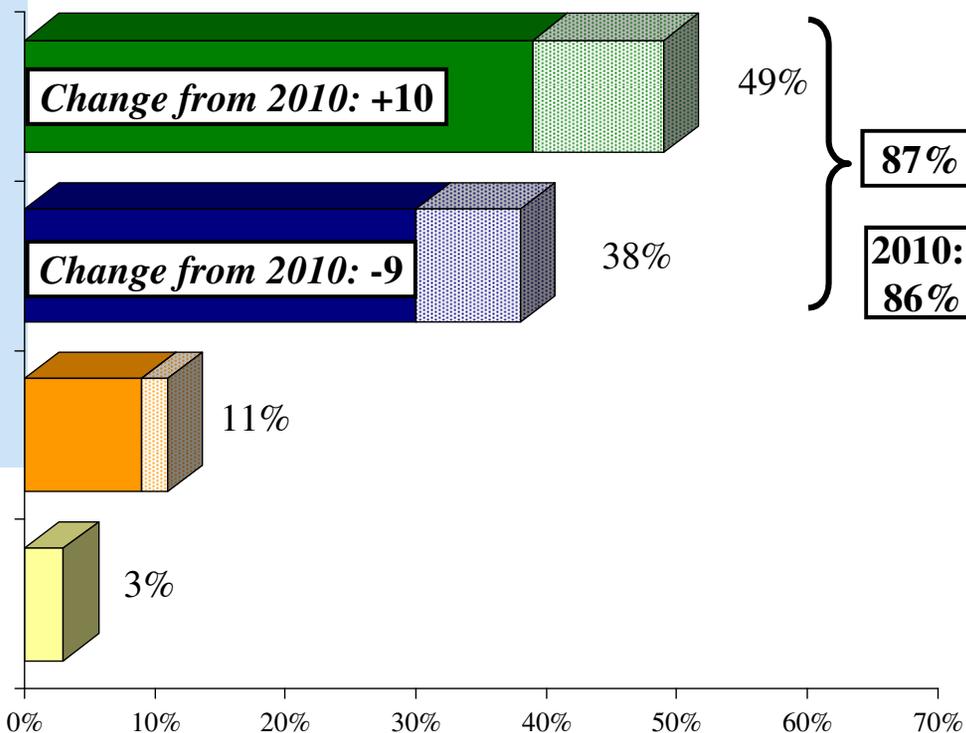
# Americans Support A National Manufacturing Strategy



# Almost All Want Action To Revitalize Manufacturing, And See A Role For Government At Least On Incentives And Trade

Which comes closer to your point of view:

- We should do whatever is necessary to revitalize manufacturing.
- We should help manufacturing, but only if government's role is limited to incentives, and trade policy.
- We should not get involved in doing anything special for manufacturing.

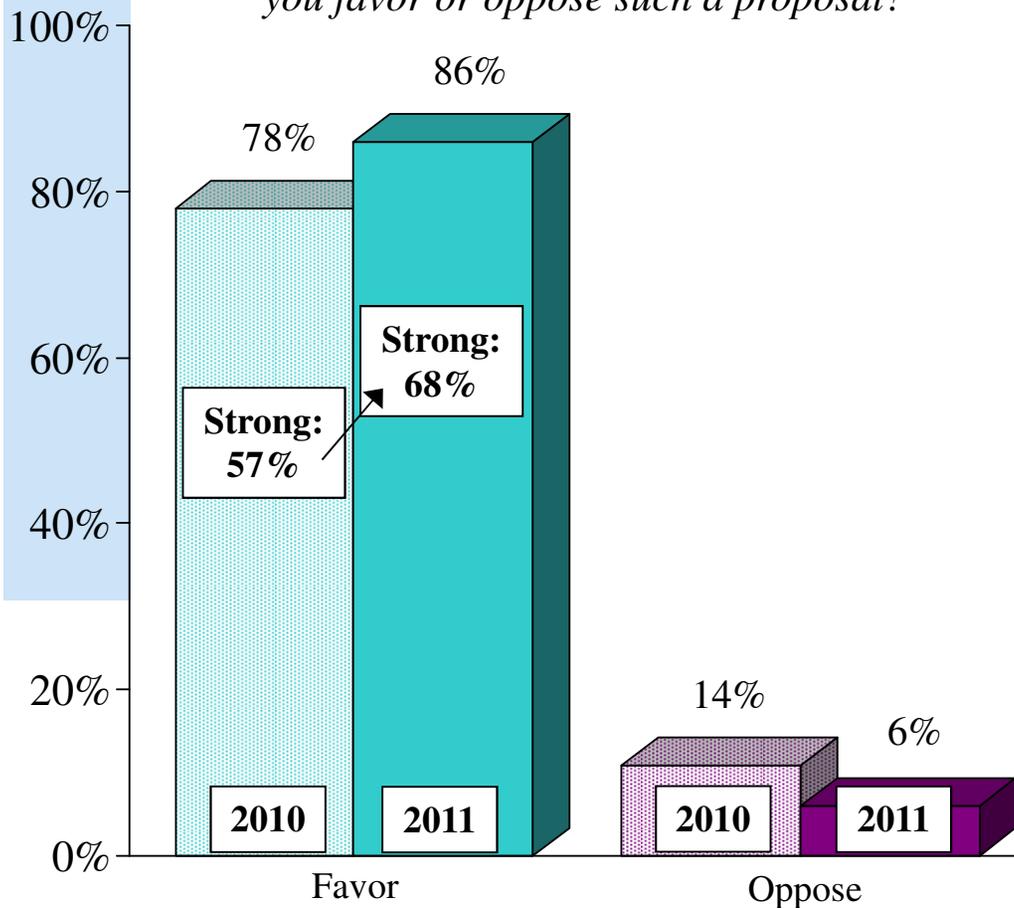


Lighter shading indicates weaker intensity

	All in	Limited	Nothing
Democrat ID	60%	32%	8%
Independent ID	47%	36%	12%
Republican	39%	46%	12%
Likely GOP Pri Vtrs	43%	42%	12%
Tea Party Supporters	39%	48%	11%
Tea Party Opponents	52%	36%	9%
Union HH	56%	34%	8%
Non-Union HH	48%	38%	10%
Young women	46%	38%	14%
Young men	51%	39%	7%
Older women	50%	39%	6%
Older men	49%	35%	13%
Upper class	40%	43%	12%
College middle class	46%	40%	13%
Non-college middle	55%	34%	8%
Lower class	49%	38%	9%
Northeast region	48%	34%	13%
Midwest region	44%	42%	9%
South region	52%	38%	7%
West region	48%	36%	12%

# Most Support A National Manufacturing Strategy And Strong Support Has Grown In The Past Year

*Some have proposed a national manufacturing strategy to make sure that economic, tax, labor and trade policies in this country work together to help support manufacturing in the United States. Would you favor or oppose such a proposal?*



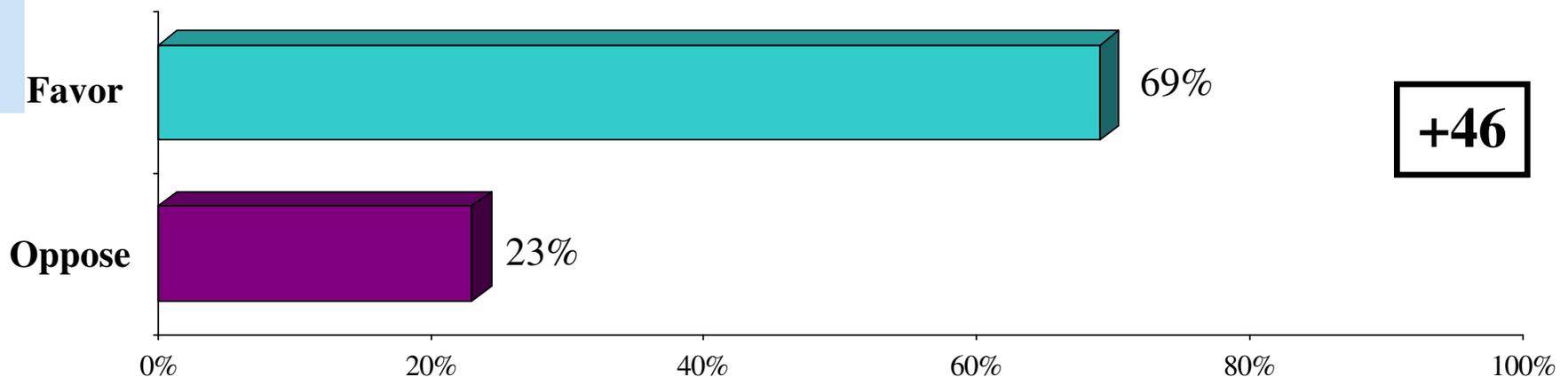
	Favor	Oppose
Democrat ID	92%	4%
Independent ID	83%	6%
Republican ID	84%	10%
Likely GOP Pri Voters	82%	10%
Tea Party Supporters	84%	10%
Tea Party Opponents	92%	3%
Union HH	92%	4%
Non-Union HH	85%	7%
Manufacturing HH	86%	6%
Non-Manufacturing HH	86%	6%
Young women	88%	5%
Young men	85%	6%
Older women	87%	6%
Older men	86%	9%
Upper class	91%	7%
College middle class	86%	6%
Non-college middle class	90%	4%
Lower class	82%	9%
Northeast region	90%	3%
Midwest region	85%	6%
South region	88%	6%
West region	83%	9%



# After Arguments From Both Sides, Still Over Two-Thirds Support A National Manufacturing Strategy

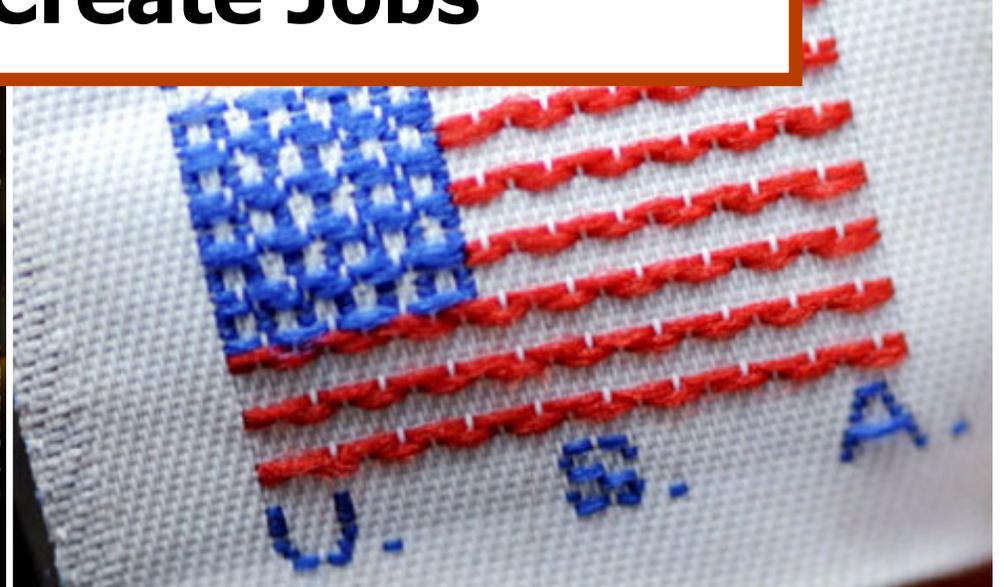
**Opponents:** Gov't shouldn't be picking winners and losers – especially when we foot the bill for the losers. Instead of worrying about yesterday's factories & bailing out failing industries, we should focus on good jobs of the future like high-tech & services where we can take advantage of our educated workforce & innovative businesses. We will never be able to compete with countries where mfg workers are paid 90 cents an hour. Our economy does best when we get gov't out of the way & let American ingenuity create good new jobs. The last thing we need is another special program just to worry about one type of business.

**Supporters:** We have the most productive workforce in the world & the most innovative companies. Yet we have lost over 50,000 mfg facilities and over 5 million mfg jobs in the last 10 years bc countries like China & Germany are taking aggressive action to support mfg. Our gov't already gets involved in trade, tax & business issues – but unlike our competitors we have not made mfg a priority. This strategy is not about doing anything new – it's about doing things smarter, & fully enforcing trade agreements already in place. Let's put our ingenuity, innovation & gov't policy to work for us. We must take steps to keep our mfg base; we won't be number one if we don't.

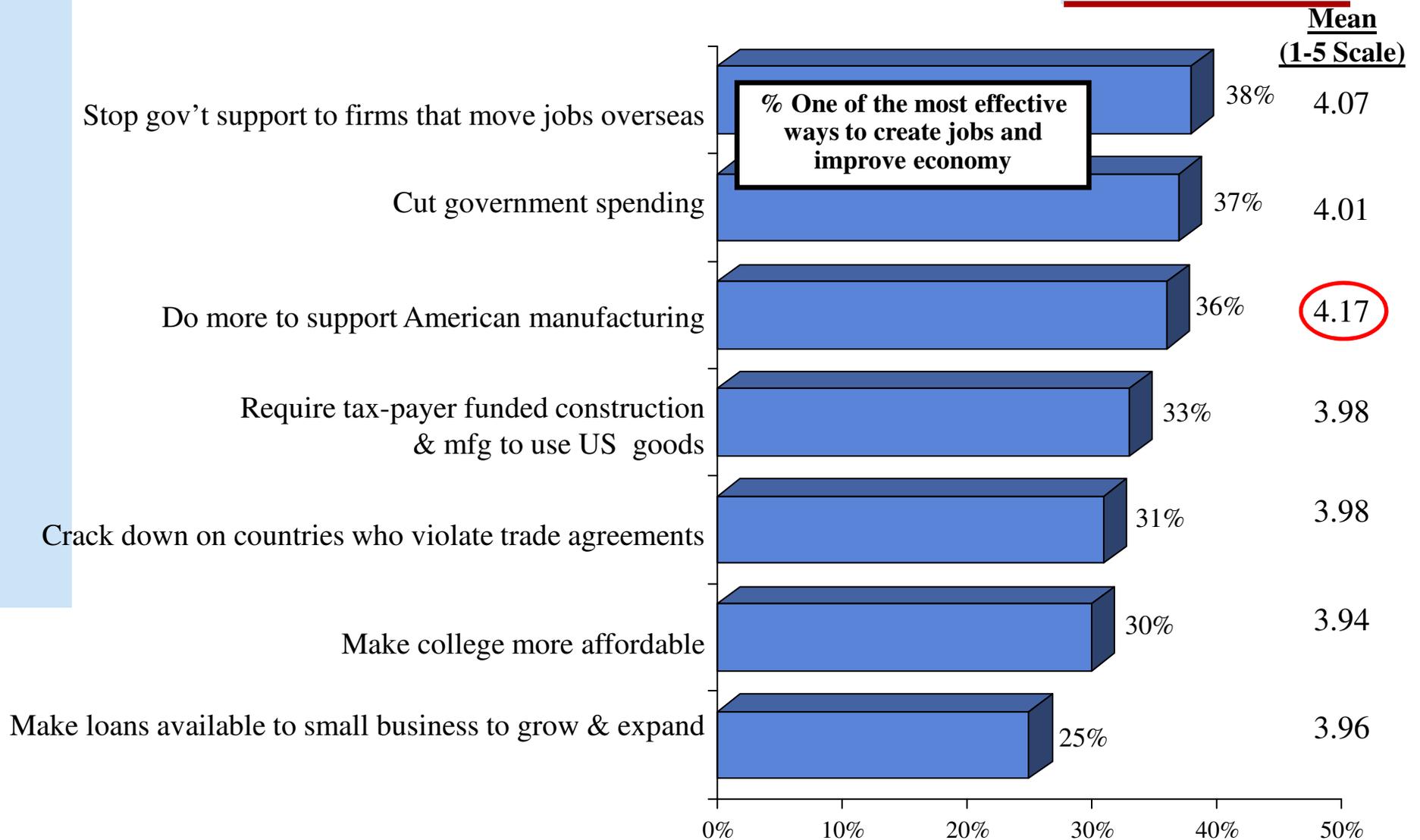




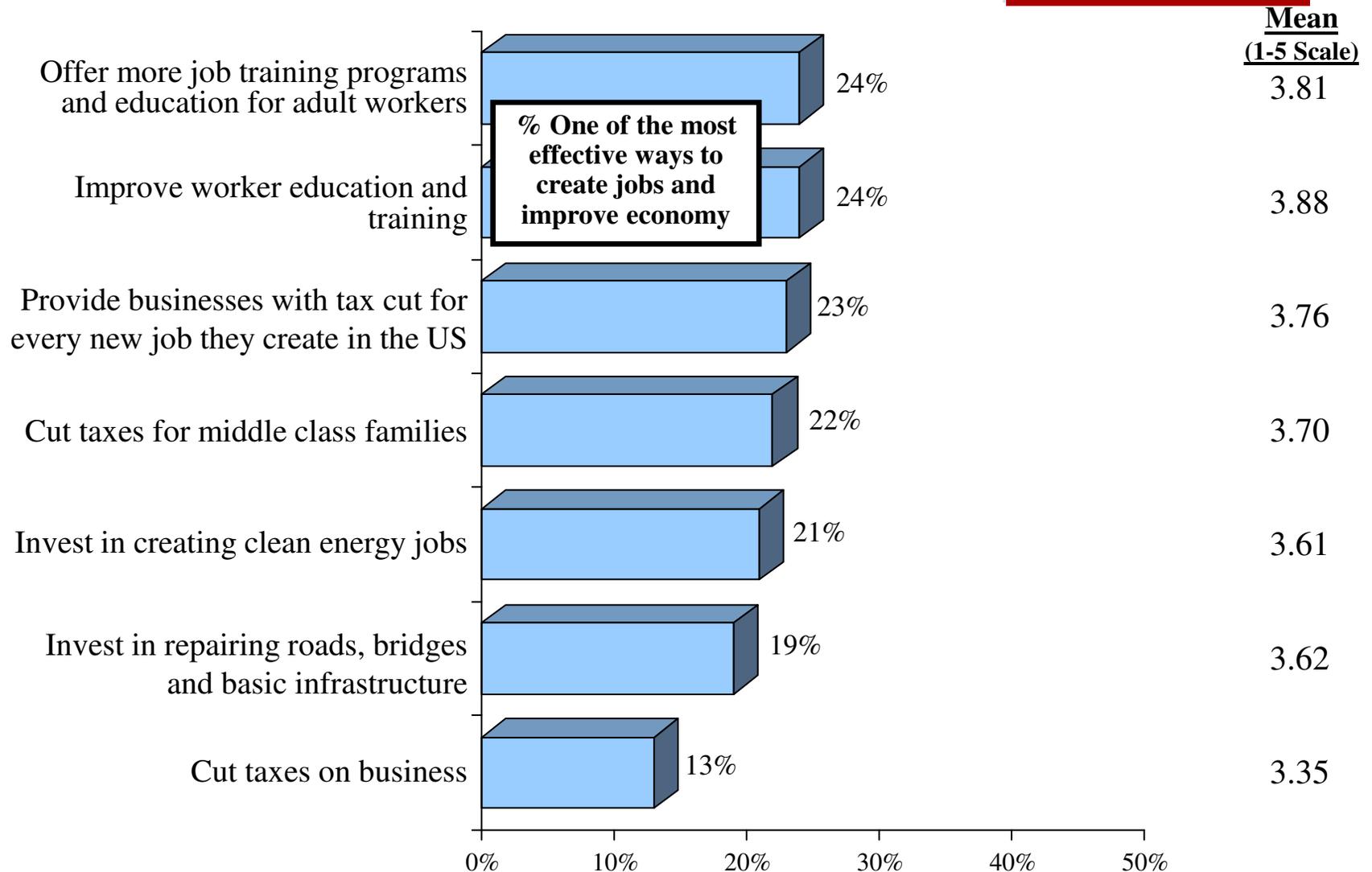
**Support For Manufacturing Is  
Seen As One Of The Most Effective  
Ways To Create Jobs**



# The Most Effective Ways To Improve The Economy And Create Jobs Are Cutting Government Spending And Supporting American Manufacturing, Not Overseas Companies



# Tax Cuts Were Judged Much Less Effective As Ways To Create Jobs And Improve Our Economy

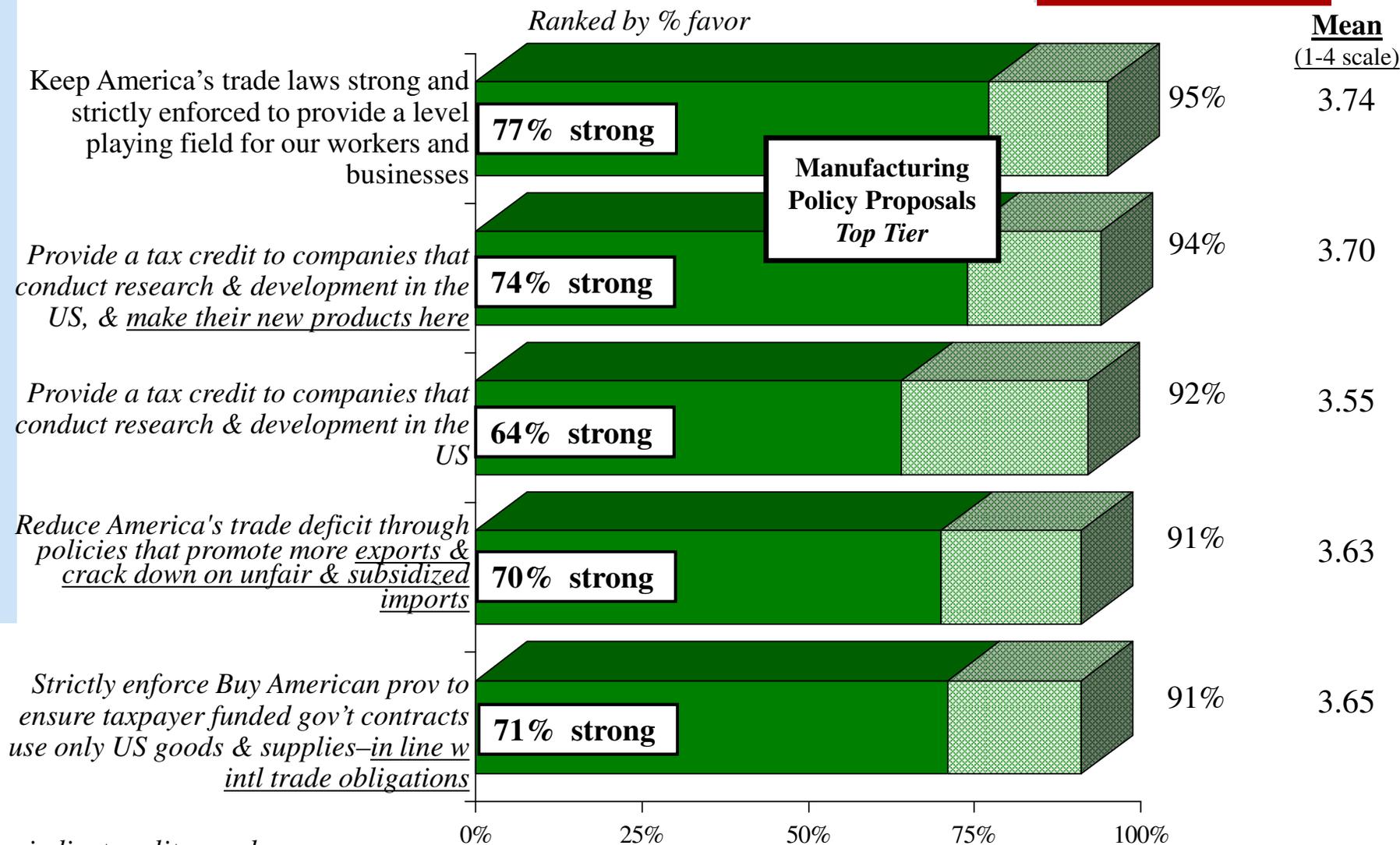




**Top Proposals To Help Manufacturing Include Incentives For Buy American And R&D As Well As Cracking Down On Trade And Outsourcing**



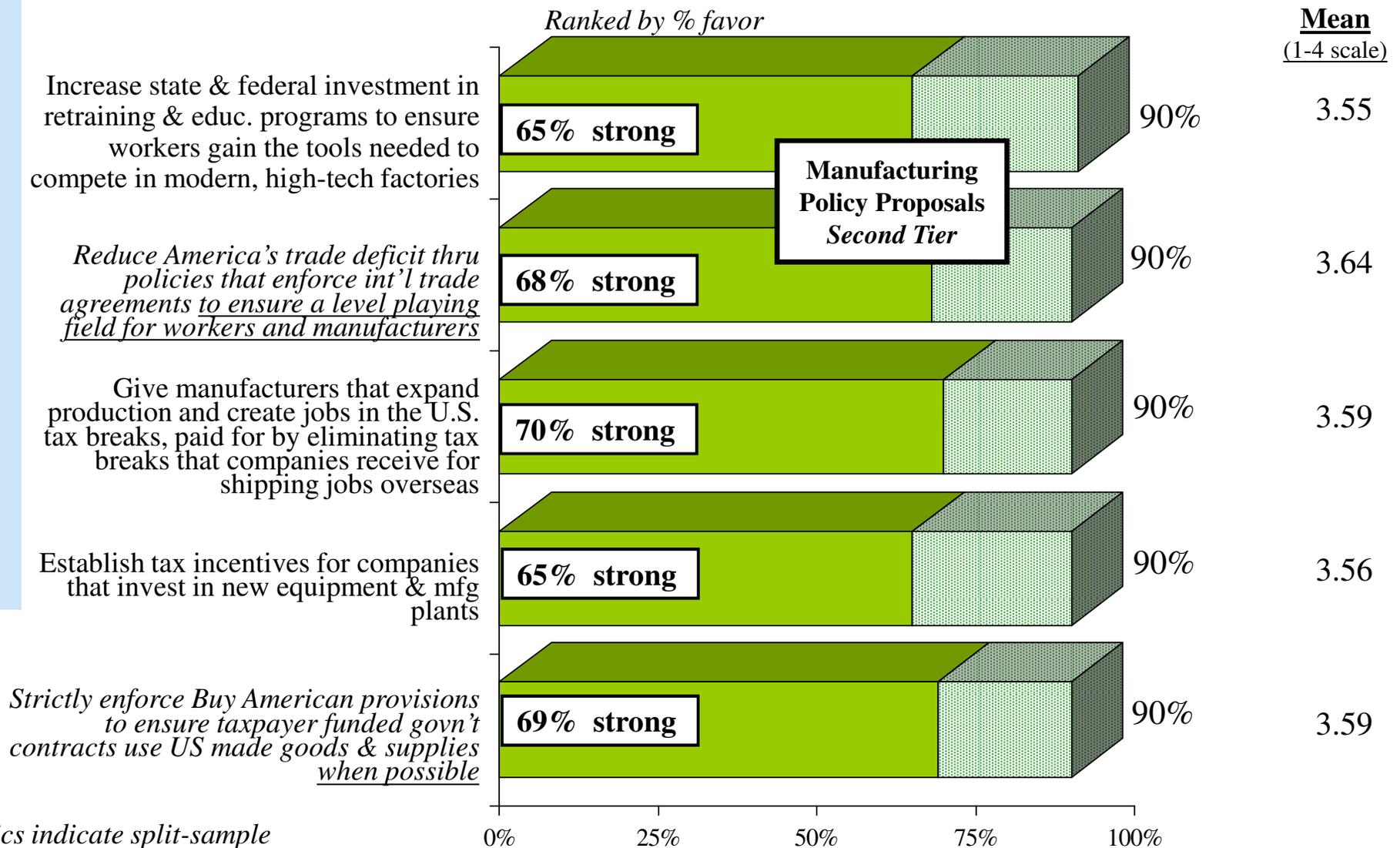
# Keeping America's Trade Laws Strong And Enforcing A Level Playing Field Is The Most Popular Proposal, Followed By R&D Tax Credits, Buy American, And Promoting Exports



*\*Italics indicate split-sample*

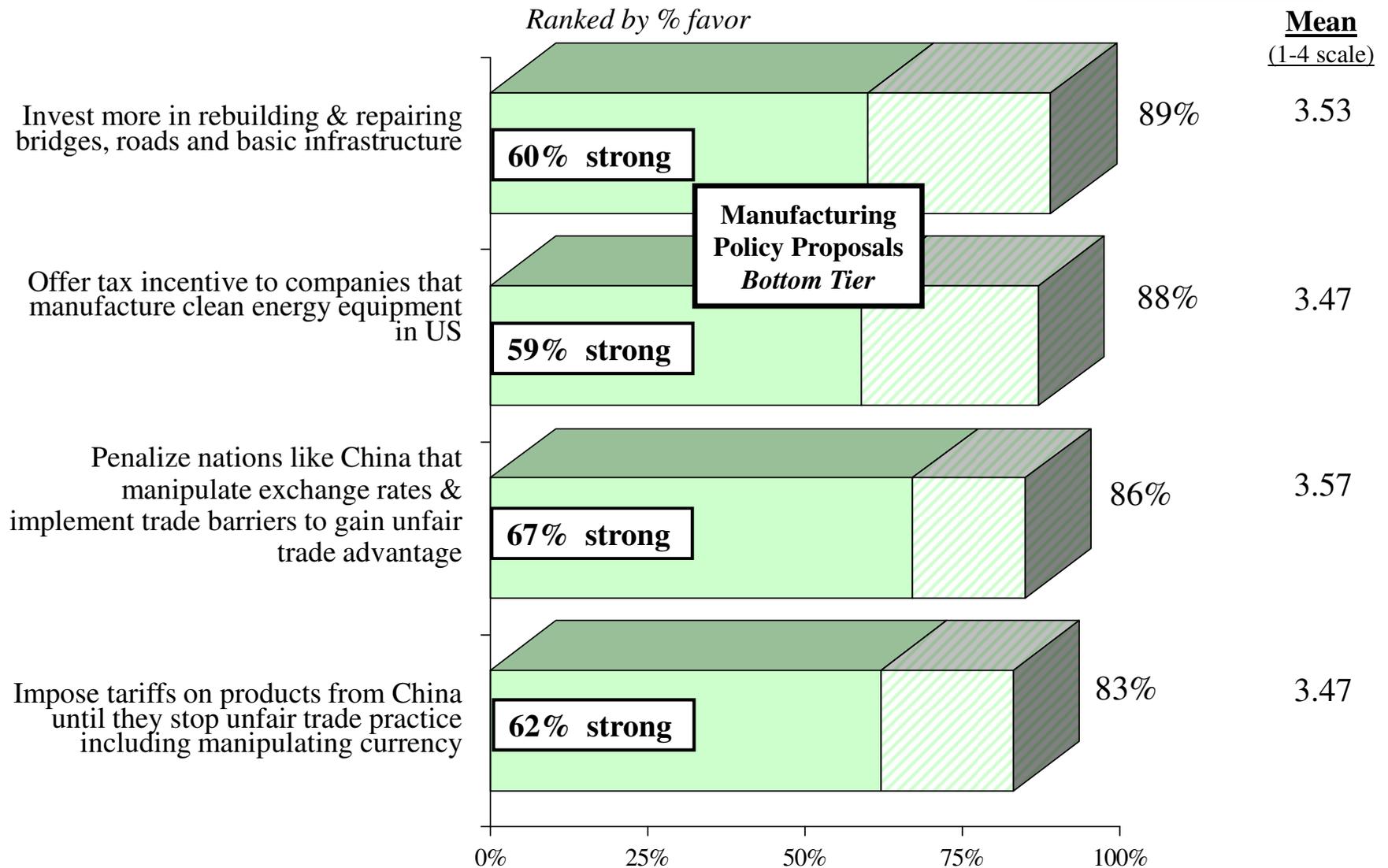


# Second Tier Proposals Are Extremely Popular As Well, And Favored By Nine In Ten Voters



*\*Italics indicate split-sample*

# Even Less Popular Proposals Garner Overwhelming Support



# Enforcing America's Trade Laws Is The Most Popular Proposal Across Party Affiliation

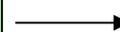
Top Manufacturing Policy Proposals <i>(Ranked by % favor)</i>	Total	Dem	Ind	GOP	Support Tea Pty	Oppose Tea Pty
Keep America's trade laws strong and strictly enforced to provide a level playing field for our workers and businesses	95%	95%	93%	96%	95%	96%
<i>Provide a tax credit to companies that conduct research &amp; development in the US, &amp; make their new products here</i>	94%	96%	91%	95%	93%	96%
<i>Provide a tax credit to companies that conduct research &amp; development in the US</i>	92%	95%	89%	90%	89%	96%
<i>Reduce America's trade deficit through policies that promote more exports &amp; crack down on unfair &amp; subsidized imports</i>	91%	95%	85%	93%	93%	92%
<i>Strictly enforce Buy American prov to ensure taxpayer funded gov't contracts use only US goods &amp; supplies—in line w intl trade obligations</i>	91%	94%	88%	90%	89%	94%
Increase state & federal investment in retraining & educ. programs to ensure workers gain the tools needed to compete in modern, high-tech factories					97%	97%
Invest more in rebuilding & repairing bridges, roads and basic infrastructure						95%

\*Italics indicate split-sample

# Enforcing Trade Laws Is Popular With Both Labor And Non-Labor Households, Though Manufacturing Families Put Buy American Provisions Above R&D Tax Credits

Top Manufacturing Policy Proposals <i>(Ranked by % favor)</i>	Total	Union HH	Non Union HH	Mfg HH	Non Mfg HH
Keep America's trade laws strong and strictly enforced to provide a level playing field for our workers and businesses	95%	97%	95%	97%	95%
<i>Provide a tax credit to companies that conduct research &amp; development in the US, &amp; make their new products here</i>	94%	97%	94%	96%	94%
<i>Provide a tax credit to companies that conduct research &amp; development in the US</i>	92%	88%	92%	92%	92%
<i>Reduce America's trade deficit through policies that promote more exports &amp; crack down on unfair &amp; subsidized imports</i>	91%	97%	90%	95%	91%
<i>Strictly enforce Buy American prov to ensure taxpayer funded gov't contracts use only US goods &amp; supplies—in line w intl trade obligations</i>	91%	98%	89%	93%	90%

Penalize nations like China that manipulate exchange rates & implement trade barriers to gain unfair trade advantage



96%



# Strategic Conclusions

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- Americans are even more worried about the economy than before and see assistance to manufacturing as a vital way to turn it around
- They believe manufacturing is a central and irreplaceable determinant of our economic strength
- They are increasingly bullish on U.S. industry and extremely concerned about China
- Manufacturing jobs are judged as a higher priority than the deficit, but voters still feel no one in Washington is doing anything
- Voters want a manufacturing strategy including: Buy American provisions, crack down on trade and outsourcing, R&D incentives



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