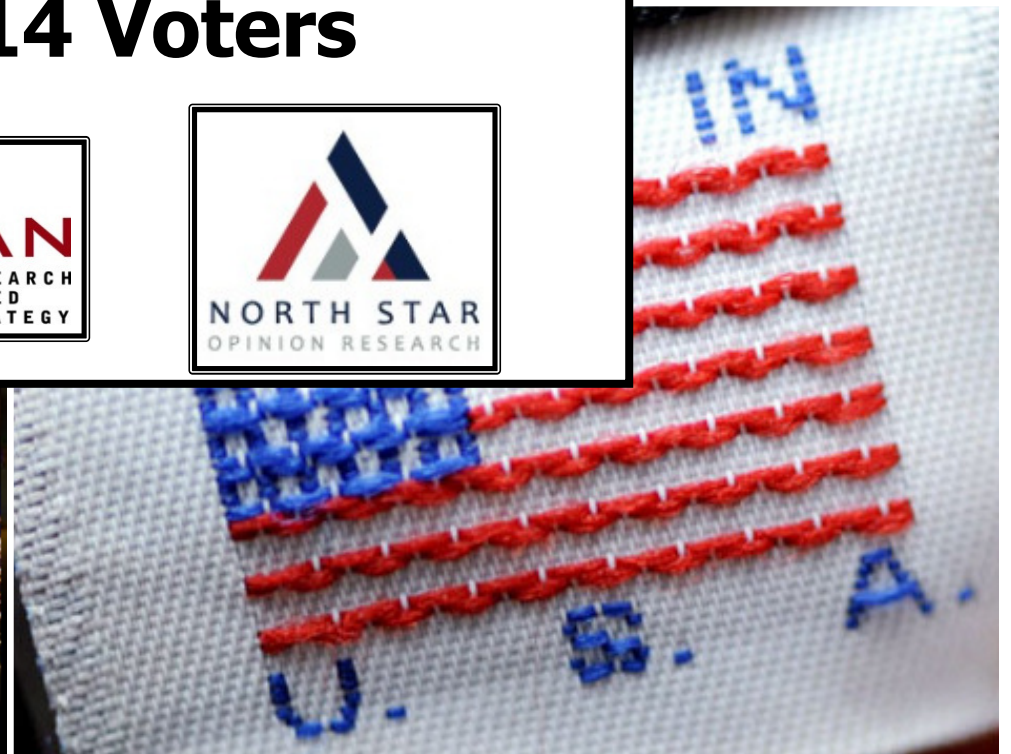


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# Findings From A National Survey And Focus Groups Of Likely 2014 Voters



# Key Findings

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- Jobs, Particularly In Manufacturing, Top Voters' Agendas
- Voters See Their Leaders As More Of An Obstacle Than A Help
- Manufacturing Is Seen As The Most Critical Component Of Our Economy
- Outsourcing Is The Most Important Cause Of Lost Manufacturing Jobs
- China Is A Serious Problem That Needs To Be Addressed, Not Ignored
- Voters Support A National Manufacturing Agenda, Including:
  - Worker Training Programs
  - Tougher Trade Policies
  - Keeping Tax Dollars Here
  - Incentives To Bring Jobs Back To The US



# Methodology

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## ❖ Focus Groups:

- 6 groups in November 2013 in Portland, OR, Des Moines, IA, and Louisville, KY
  - 2 of swing voters in Oregon, divided by dependence on manufacturing
  - 2 of swing voters in Iowa, divided by dependence on manufacturing
  - 2 of swing voters in Kentucky, divided by under 30/over 30

## ❖ National Poll:

- 1,200 Likely 2014 General Election Voters—conducted January 6-9, 2014
- Margin Of Error +/- 3.1% (Higher For Subgroups)





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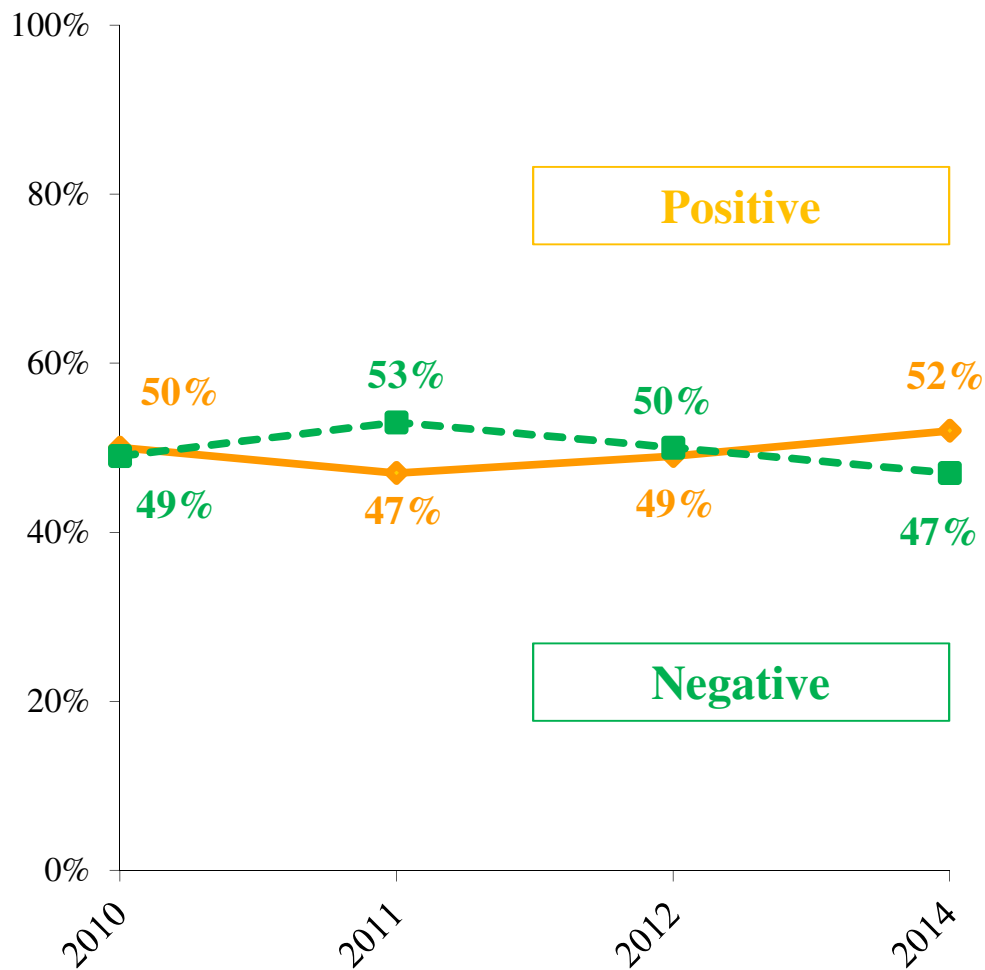


**Americans Are A Bit More  
Positive About The Economy—  
But Uncertain About The Future**



# A Slim Majority Now Rate Their Economic Situation Positively, But Majorities Are Negative Among Independents, Non-College, And Manufacturing Households

How would you rate your economic situation - excellent, good, just fair, or poor?



	Positive	Negative
Democrat ID	50%	49%
Independent ID	46%	53%
Republican ID	61%	39%
Male	51%	49%
Female	53%	46%
Under 50	53%	47%
50+	51%	47%
High School or Less	45%	55%
Some College	45%	54%
College Grad+	59%	40%
Northeast	52%	48%
Midwest	51%	48%
South	54%	45%
West	51%	49%
White	57%	42%
Black	37%	62%
Hispanic	32%	67%
Union Household	54%	46%
Non-Union household	52%	47%
Mfg household	46%	54%
Non-mfg household	53%	46%



# Perceptions Of The Economy Were Mixed, With Many Noting We Are At A Transition Point

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“I would just say [the state of the economy is] checkerboard. I think there are areas that are robust and some probably more traditional areas that are suffering.” – OR Non-Manuf.

“I see [the economy as] steady but not necessarily strong.” – IA Manuf.

“I think there is growth in certain areas, but then there is stagnant parts too, so it’s kind of in flux.” – IA Non-Manuf.

“Right now we’re kind of in this weird growing pain stage that no one really knows what’s going to happen.”  
– OR Manuf.

“Right now, I would say kind of like what she said, rebuilding. It was stagnant about two or three years ago, pretty hard to get a job 2008 to 2010 but stuff is opening up it seems like.” – KY 18-29

“[The economy is] better than it was five years ago.” – KY 30+

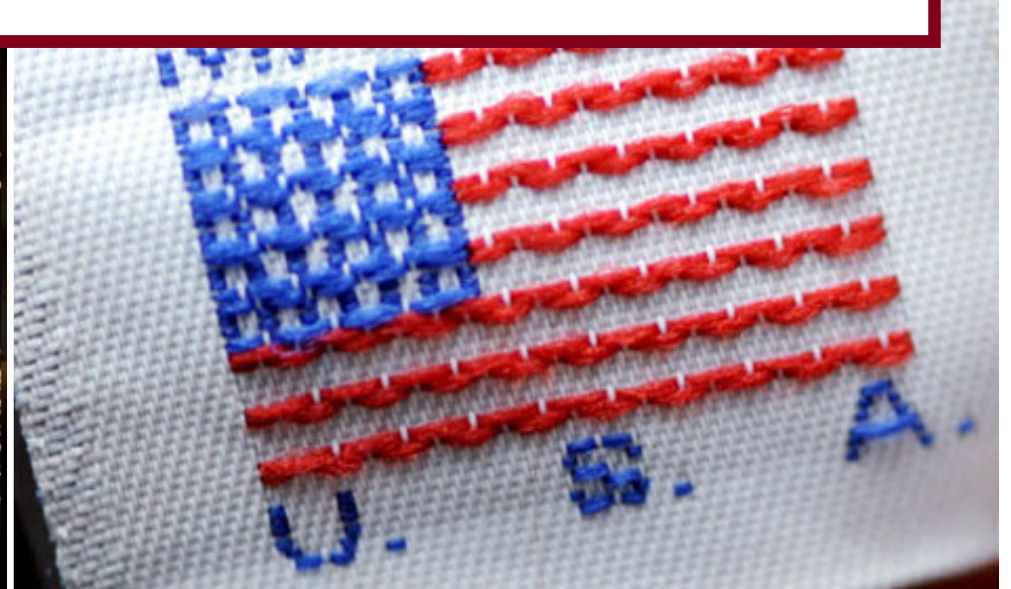
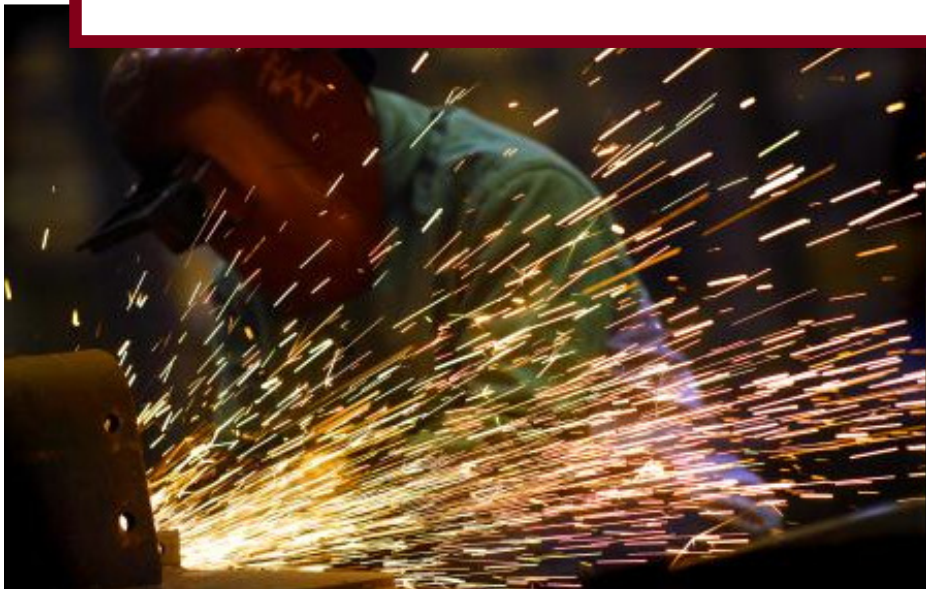




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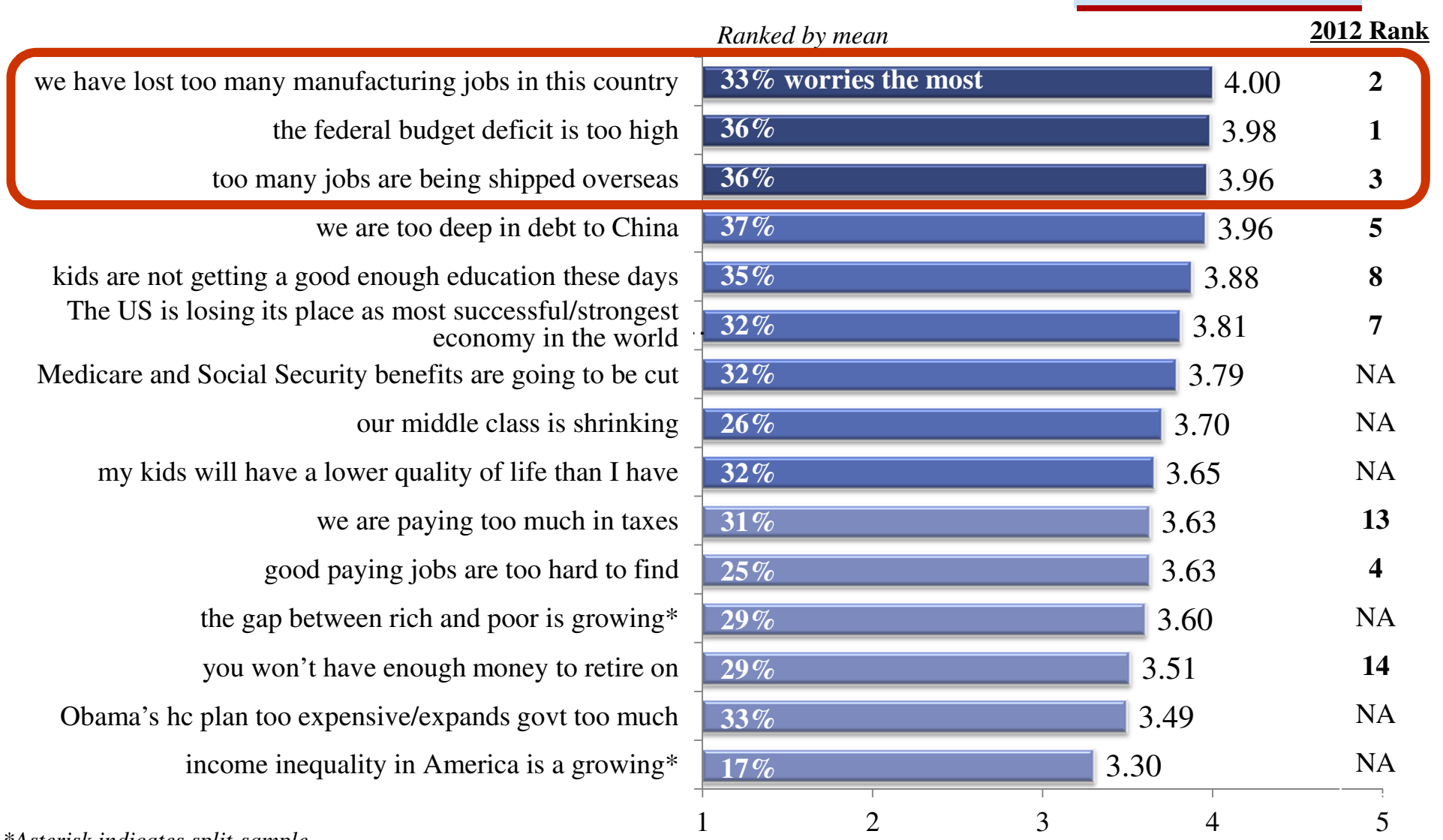


# Jobs, Particularly In Manufacturing, Top Voters' Agendas



# Voters' Greatest Concerns Continue To Revolve Around The Loss Of Manufacturing Jobs And Jobs Shipped Overseas

For Those In Bad Economic Straits, Manufacturing Loss, Outsourcing, And China Debt Are Top



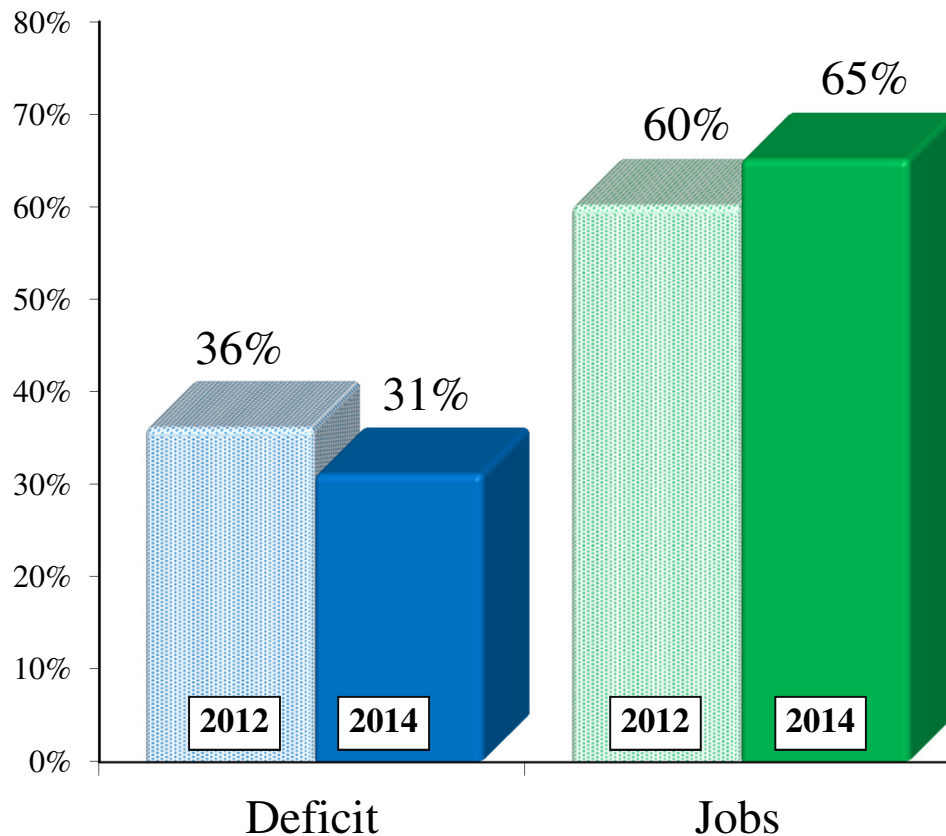
\*Asterisk indicates split-sample





# Two Thirds—An Increasing Majority—Prioritize Job Creation Over Deficit Reduction

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



	Deficit	Jobs
Democrat ID	16%	81%
Independent ID	33%	64%
Republican ID	48%	47%
Male	36%	61%
Female	28%	69%
Under 50	30%	67%
50+	32%	63%
High School or Less	31%	64%
Some College	33%	63%
College Grad+	31%	66%
Northeast	29%	68%
Midwest	31%	65%
South	33%	64%
West	31%	64%
White	35%	61%
Black	15%	81%
Hispanic	24%	73%
Union Household	30%	66%
Non-Union Household	32%	64%
Manufacturing hhold	28%	68%
Non-Manuf hhold	32%	64%

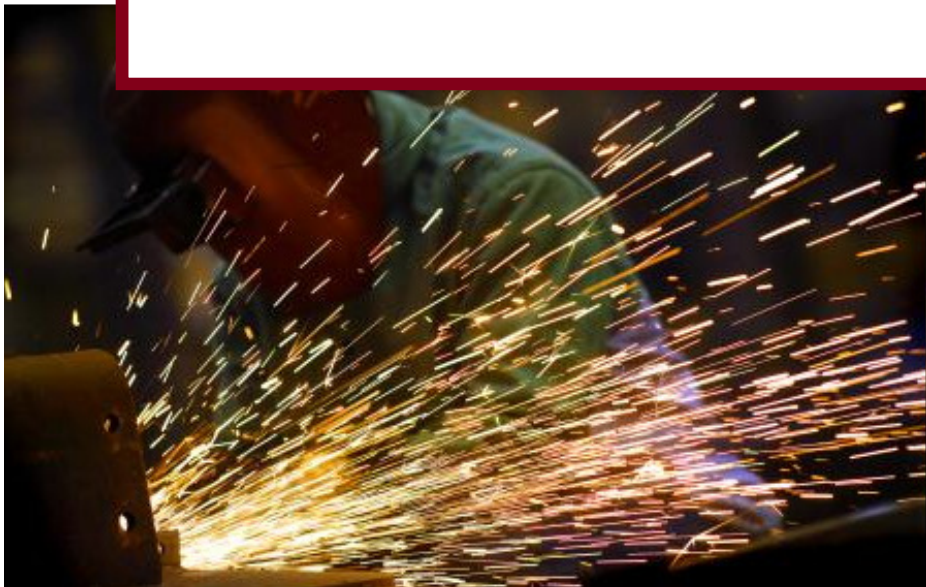
\*Split-sample – “create jobs” vs. “create manufacturing jobs”



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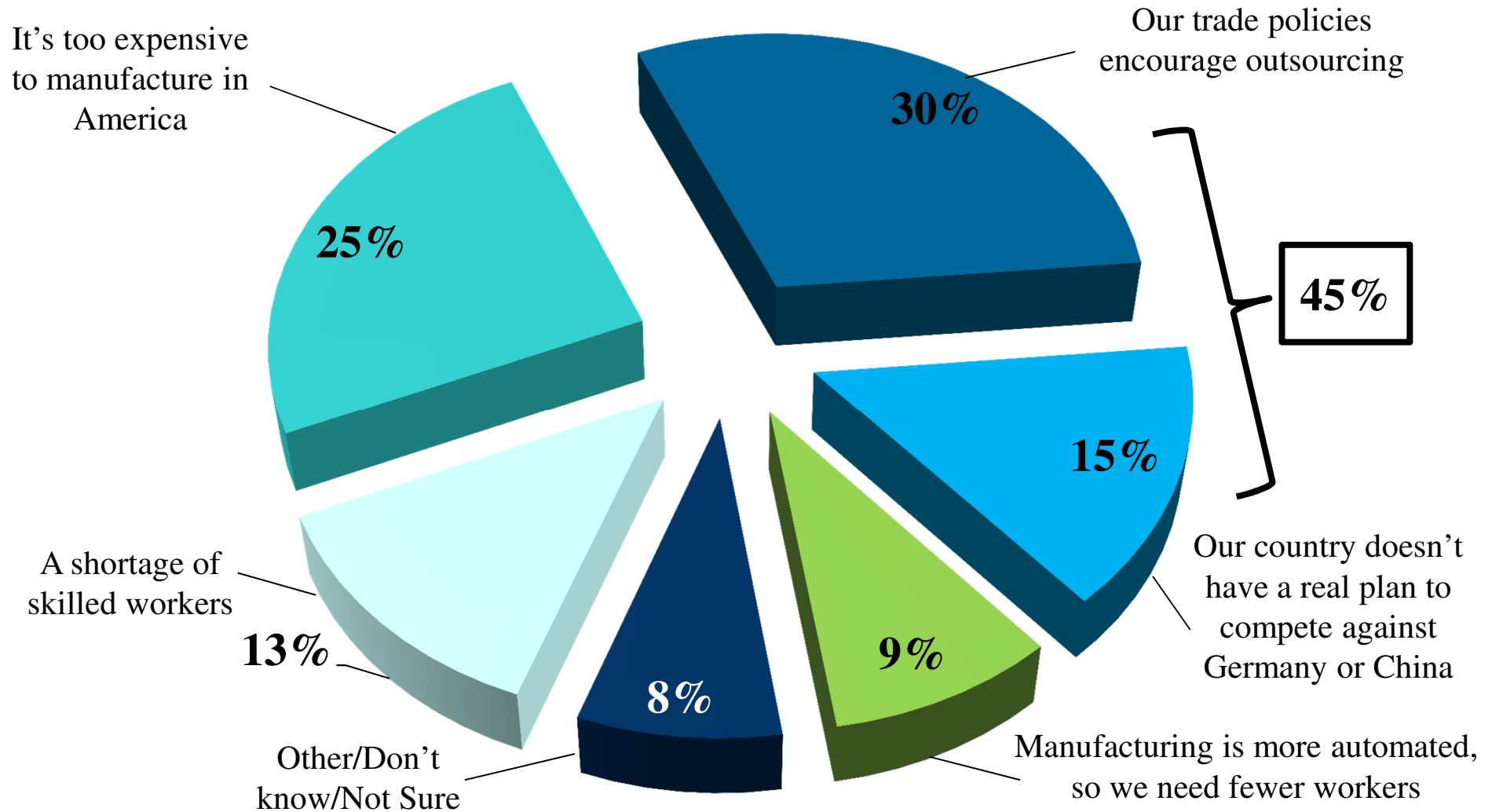


**Yet Voters See Their Leaders As  
More Of An Obstacle Than A Help**



# U.S. Policies Are Perceived As The Main Impediment To Creating Manufacturing Jobs

Which of the following is the single biggest obstacle to creating manufacturing jobs in America today?

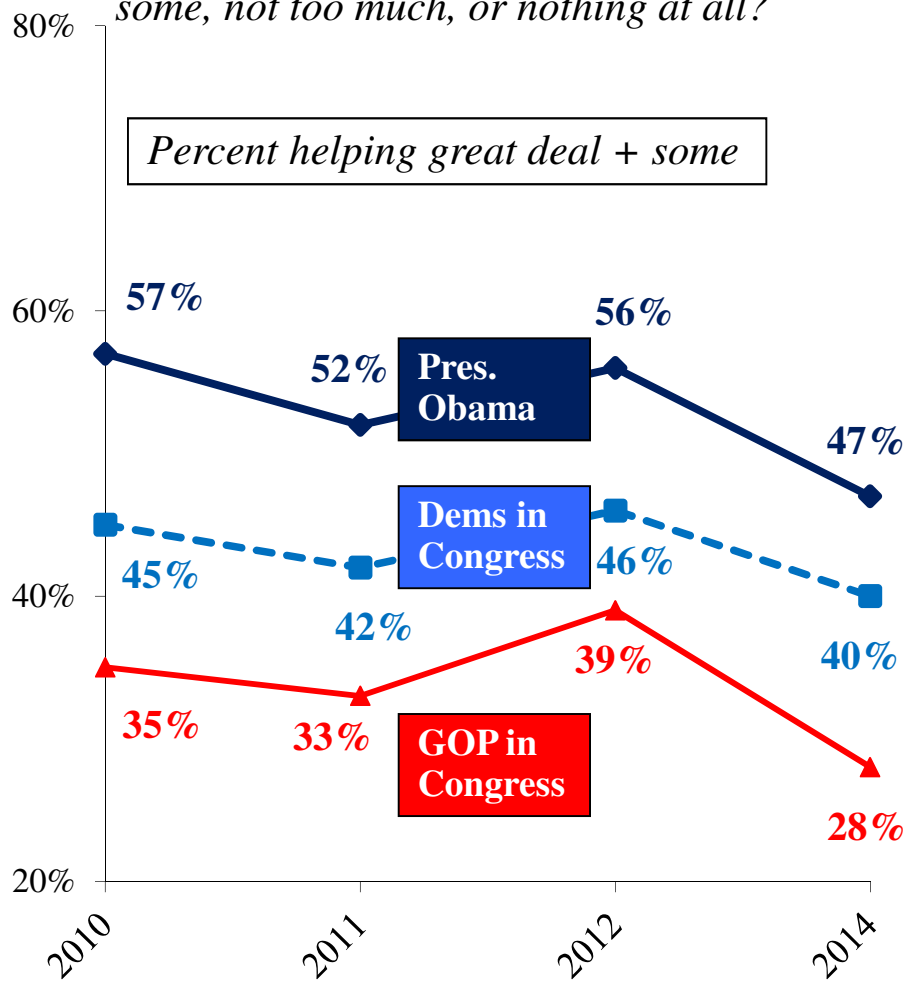




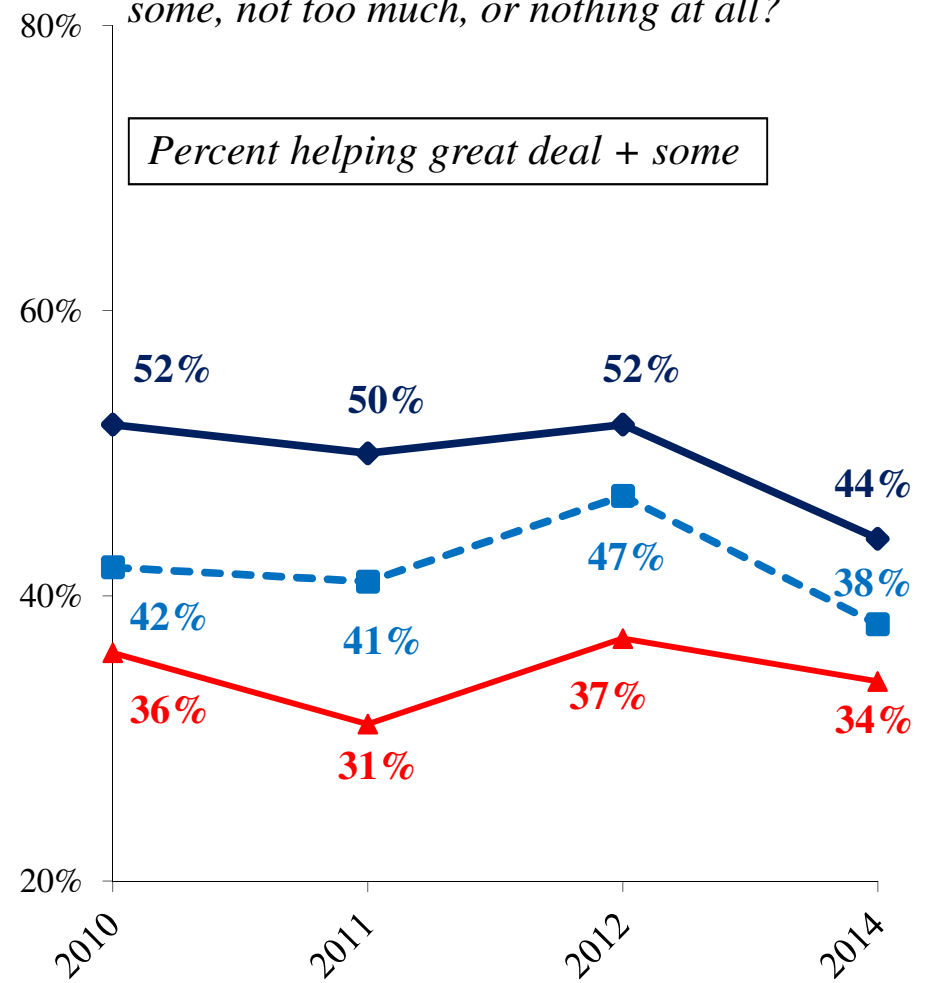
# Voters Believe Neither The President Nor Congress Are Doing Anything To Help Create Jobs Or Enforce Fair Trade

## All Parties Have Seen A Drop In Their Evaluation

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?



# Politicians' Talk About Manufacturing Is Seen As Just Lip Service

“[Politicians] haven’t done anything concrete to address [manufacturing]. It might be something that is just shuffled into the middle of their speech to appeal to somebody but it is never the forefront of anything that you talk about.”  
– KY 18-29

“Most people care about things that directly affect them or have affected them in the past. Most of our politicians have not been brought up in environments that involve manufacturing. Some have and there are some that do care but the majority, no.”  
– KY 18-29

“It does seem like around election time they like to have at least one shot of being in some sort of manufacturing plant, talking to someone with a hard hat on.” – KY 30+

“When election time comes, yeah you hear it all over the place, especially ... between Romney and Obama. It was like one-fourth of the conversation was about the economy and outsourcing.” – IA Non-Manuf.

“The majority of them don’t have any experience or credibility or knowledge of manufacturing.” – OR Manuf.



# Obama's Promise To Create One Million Manufacturing Jobs Received Mixed Reviews

## Positive

“Sure it is [achievable]: don't send the jobs away. It's simple. A four year old could understand it.” – OR Manuf.

“A million new jobs in four years? That's only 250,000 a year. That sounds doable.” – KY 30+

“If we could get everybody turned around...it could be done. You have to get everybody in the right mindset.” – IA Manuf.

“It is definitely achievable; it is just a matter of whether he wants to.” – KY 18-29

“I don't think [its whether ] Obama wants to do it...it is if he can convince congress. I think he's in a good place with what he wants to do but his hands are tied when he does a lot of the stuff. A lot of people don't realize that.” – KY 18-29

## Negative

“Yeah, how is he, what is he going to do? Is he going to expand infrastructure? Just saying a million jobs, there's nothing behind it. It doesn't mean much.” – IA Non-Manuf.

“I remember hearing [about the million jobs promise]. But you don't need to make new jobs; you need to keep the bloody ones at home. Bring them back home.” – OR Manuf.

“It's hard to measure. If you lose 600,000, 20-dollar-an-hour jobs, and you replace it with one million \$8/hour jobs, it's not really getting anywhere.” – IA Non-Manuf.





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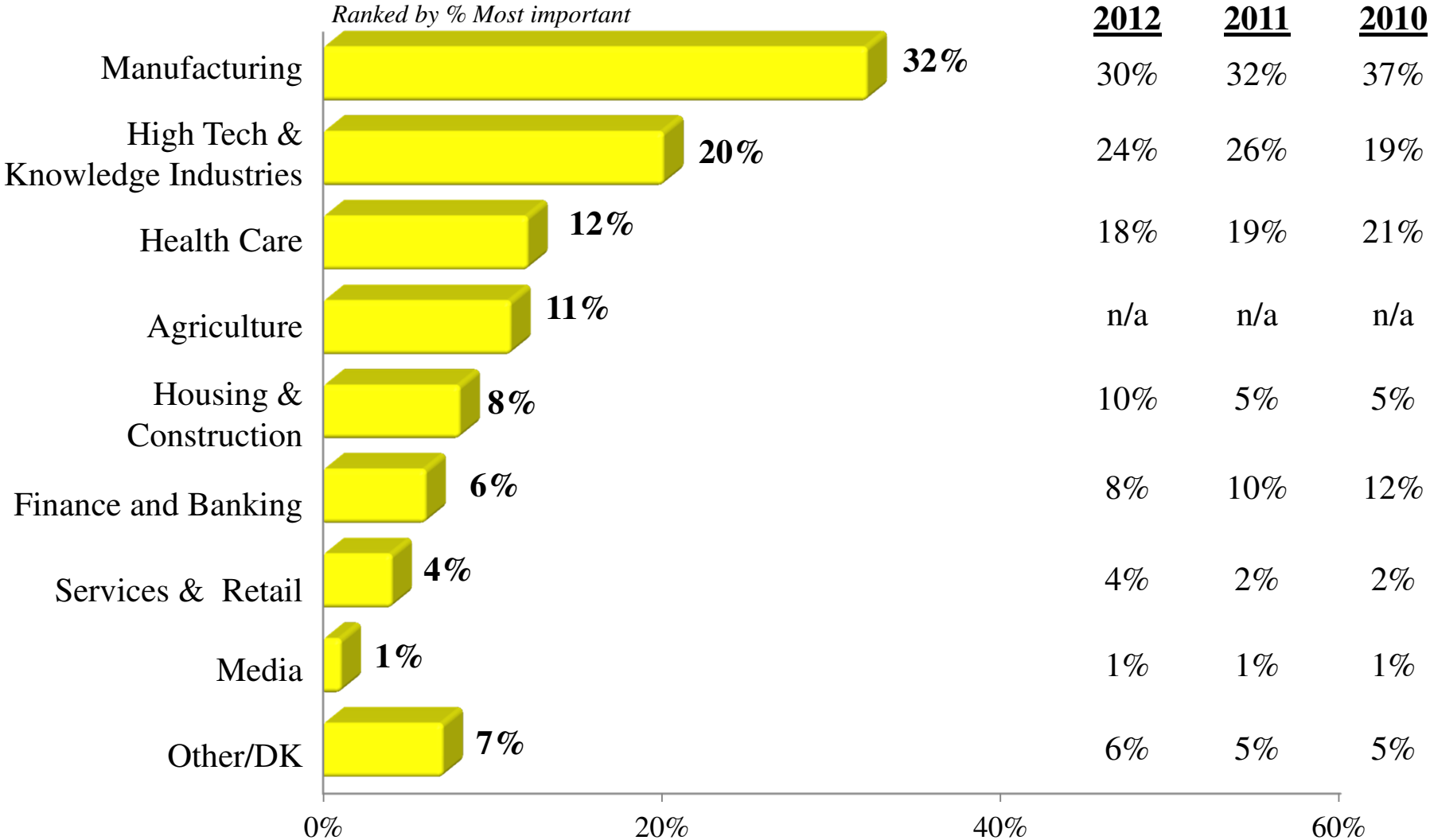


**Manufacturing Is Seen As The Most  
Critical Component Of Our Economy**



# Voters Believe Manufacturing Is Our Most Important Industry

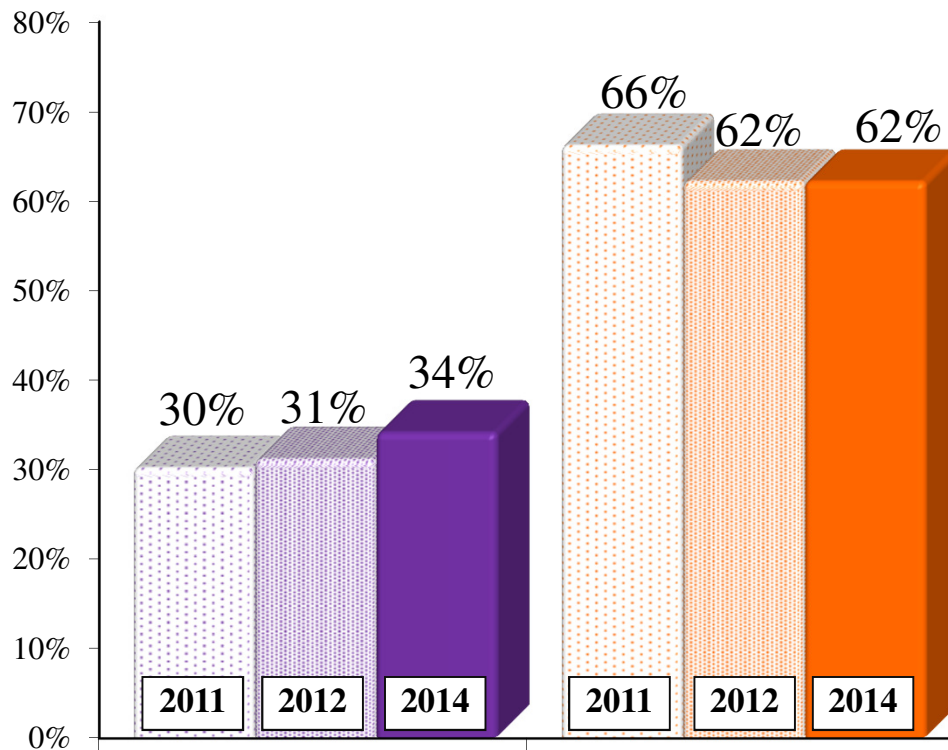
*Which of the following industries is most important to the overall strength of the American economy?*





# Voters Reject The Idea That Other Sectors Like High Tech Or Services Can Replace Manufacturing

- 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.
- Manufacturing is the single most important part of the American economy and we need a manufacturing base here if this country and our children are to thrive in the future.



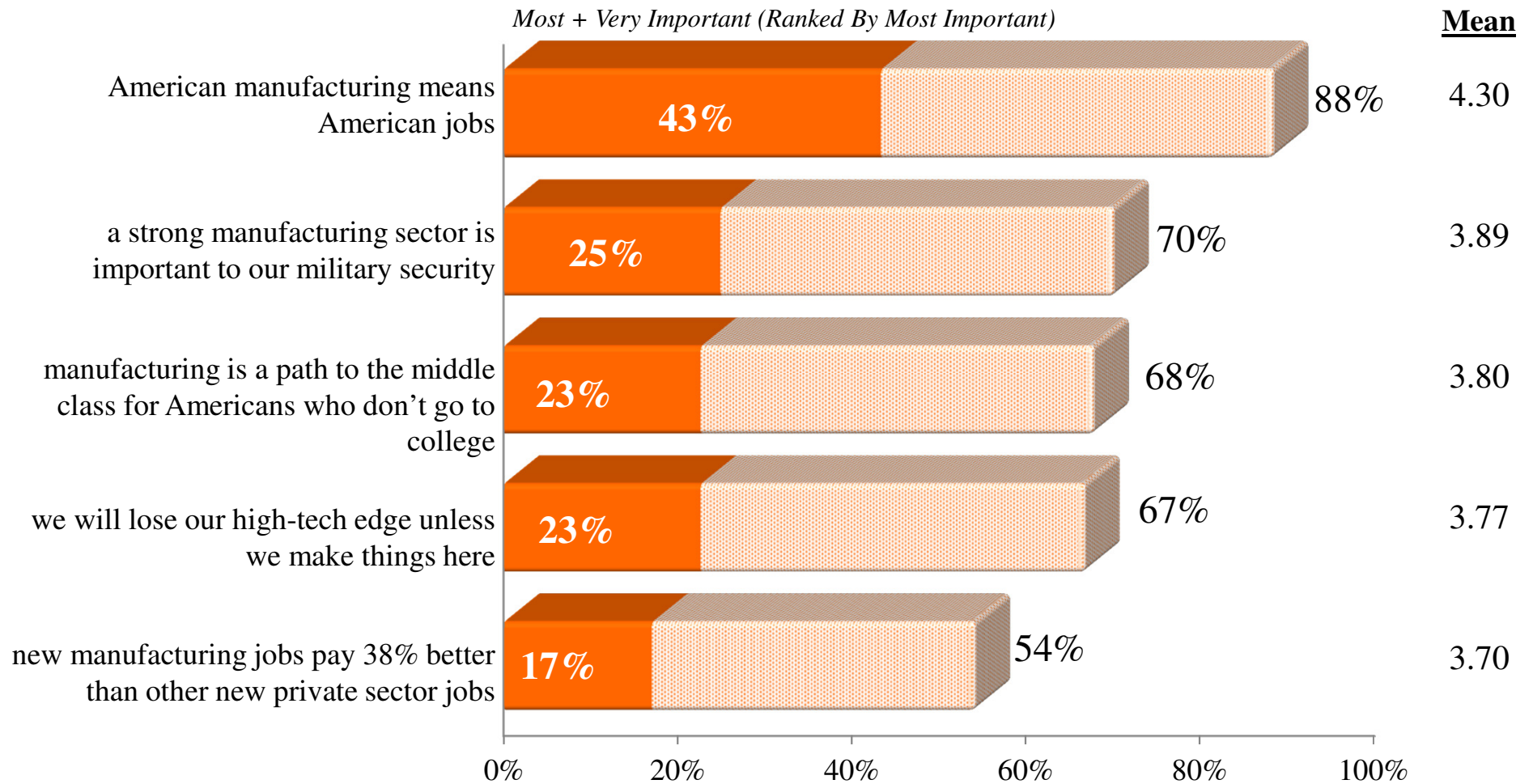
	New Areas Replace	Need Manufact'g
Democrat ID	32%	64%
Independent ID	36%	57%
Republican ID	32%	65%
Male	33%	63%
Female	35%	61%
Under 50	39%	58%
50+	29%	65%
High School or Less	16%	80%
Some College	31%	66%
College Grad+	41%	54%
Northeast	35%	63%
Midwest	32%	64%
South	31%	63%
West	38%	58%
White	34%	62%
Black	30%	66%
Hispanic	34%	66%
Union Household	33%	64%
Non-Union household	34%	62%
Manufacturing hhold	19%	76%
Non-Manuf hhold	36%	59%





# Manufacturing Means Jobs — And That’s Why It Is Central

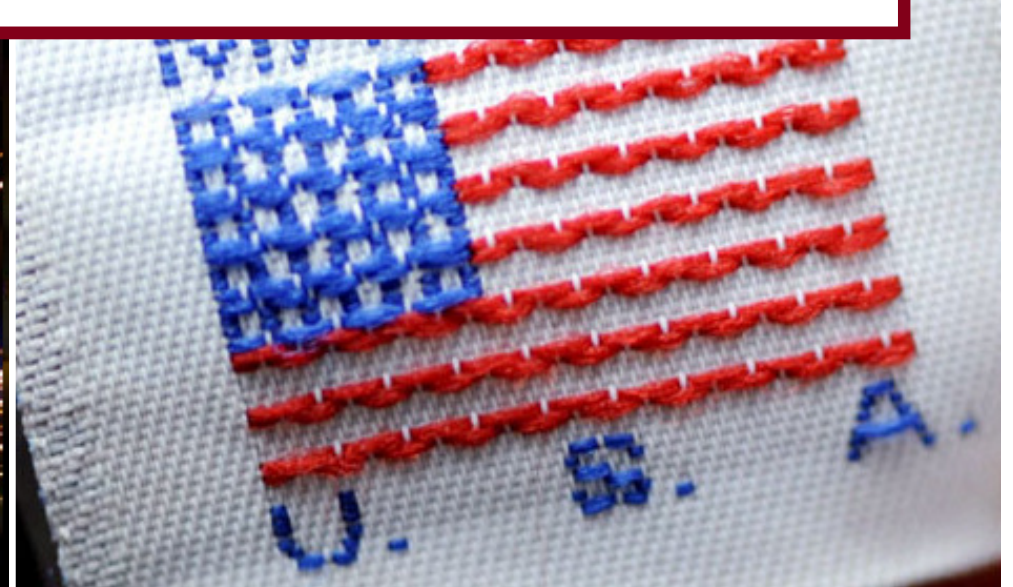
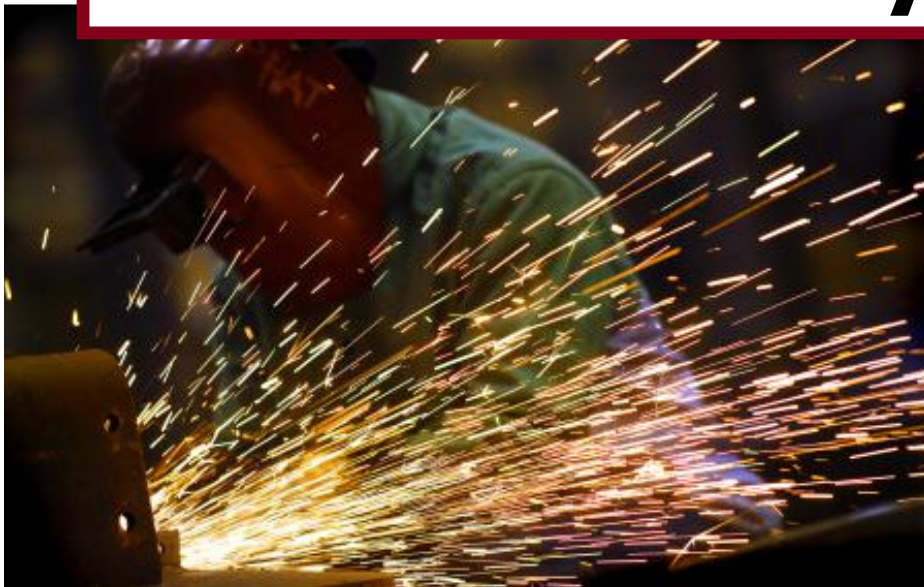
Now I am going to read some reasons people have said it is important to have manufacturing in the US. After each, please tell me whether you think it is one of the most important reasons to have manufacturing in the US, very important, somewhat important, not too important, or not important at all as a reason to have manufacturing in the US.



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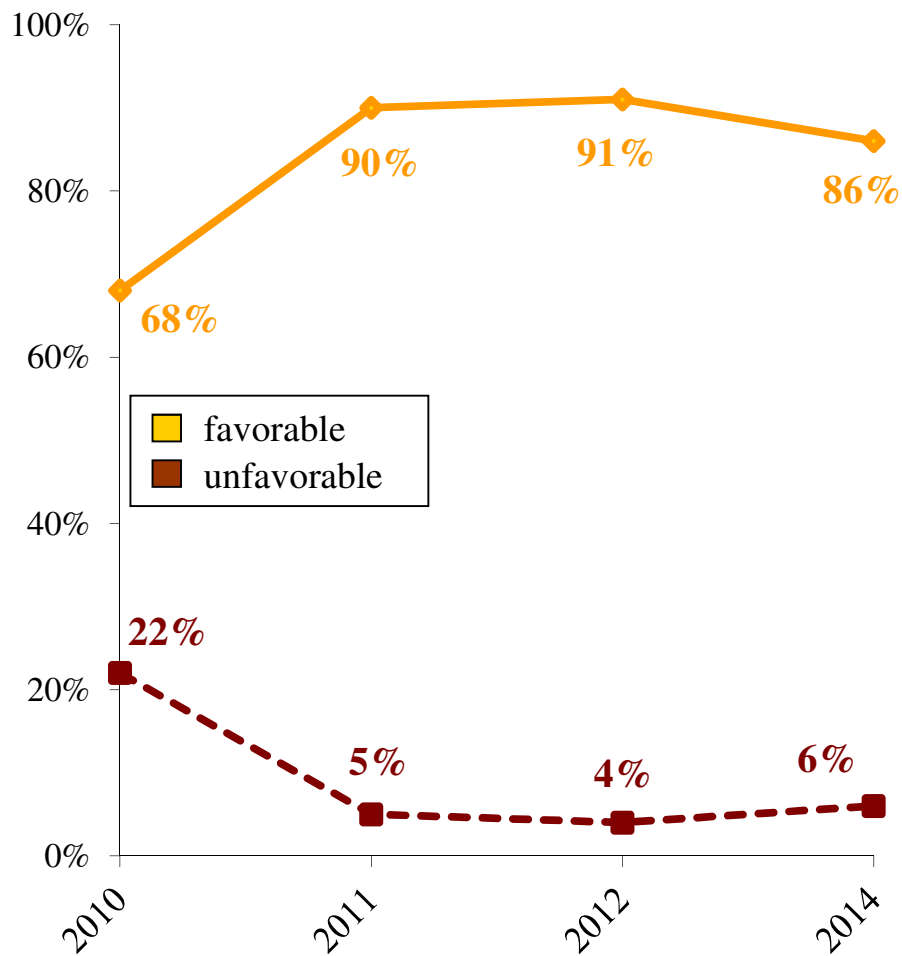
# Support For American Manufacturing And Manufacturers Is Nearly Universal



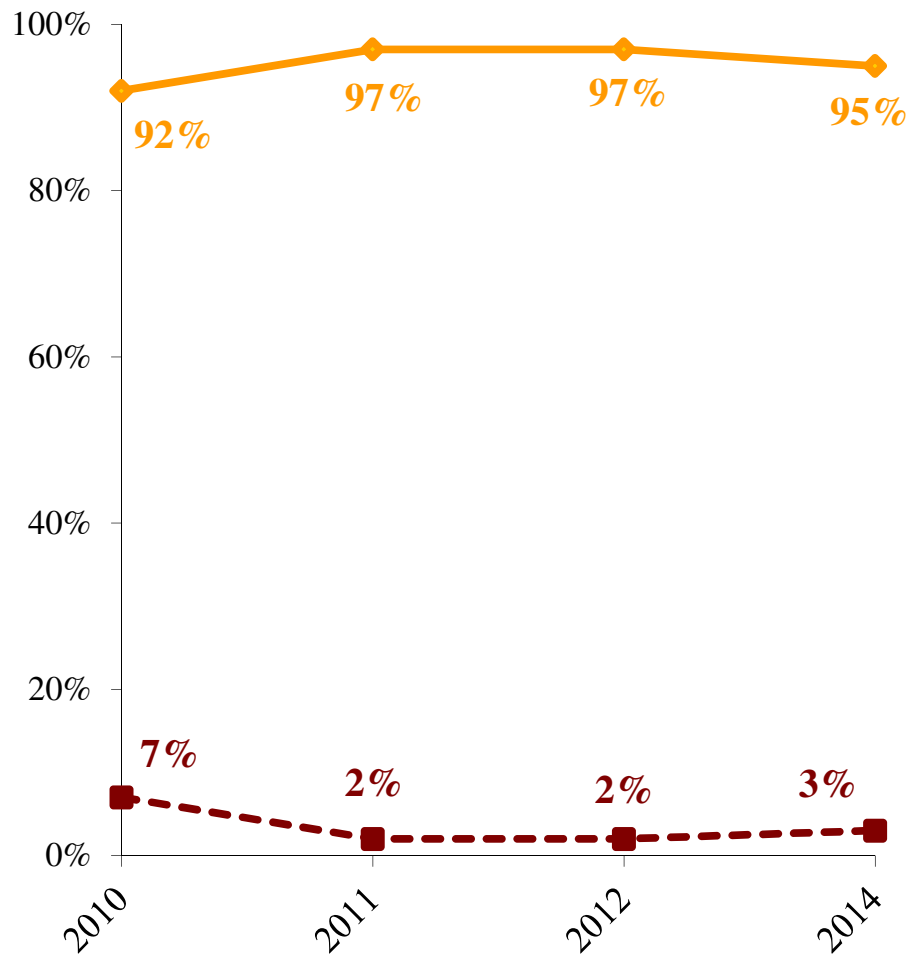


# American Manufacturing Companies And Goods Continue To Receive Exceptional Ratings

## American Manufacturing Companies Favorability



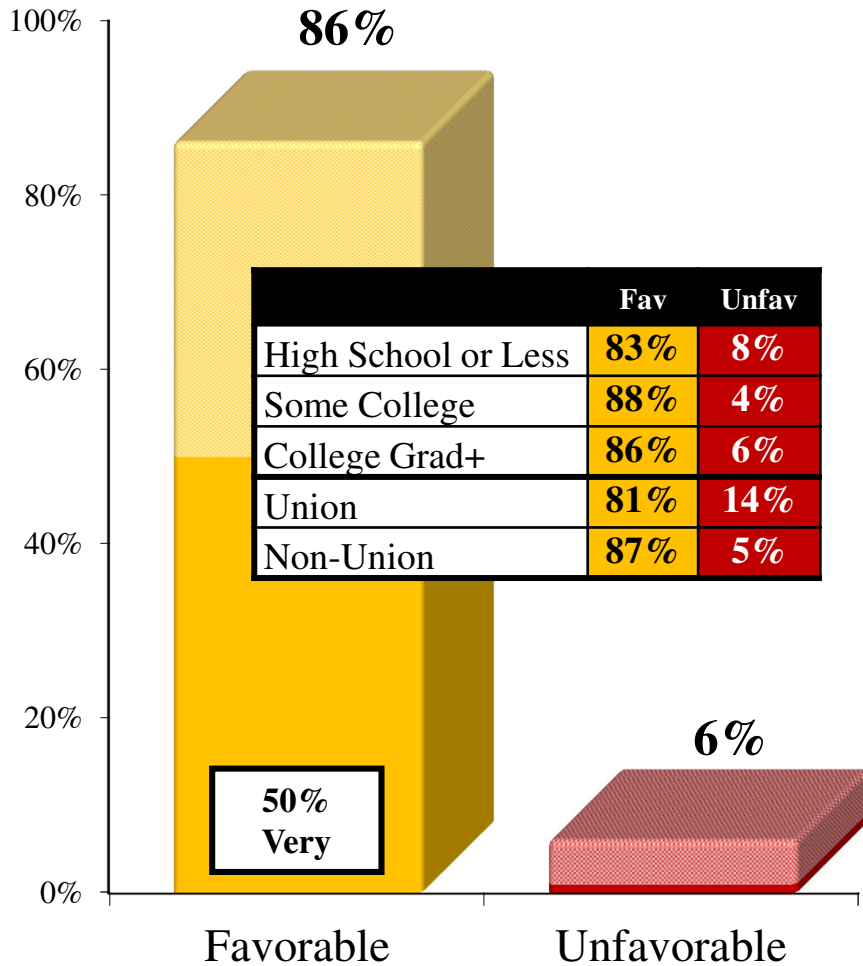
## Manufactured Goods Made In America Favorability



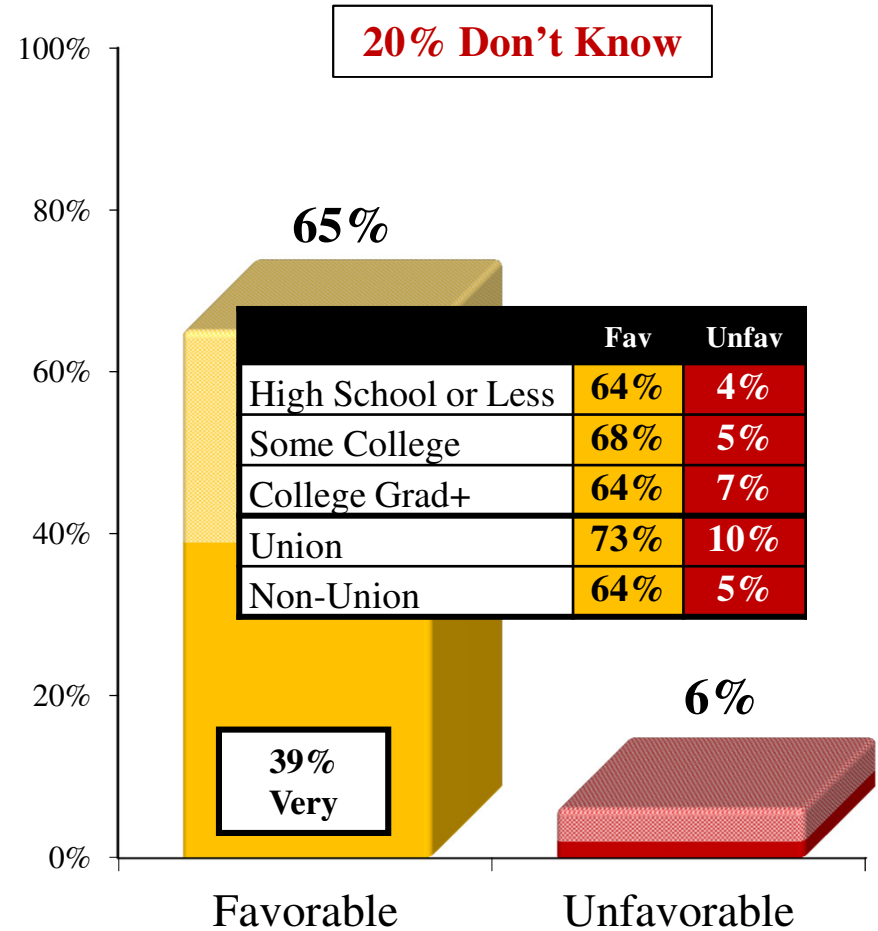


# Advanced Manufacturing Is Regarded Less Favorably Because Fewer Know What It Means

American Manufacturing Companies Favorability



American Advanced Manufacturing Cos. Favorability



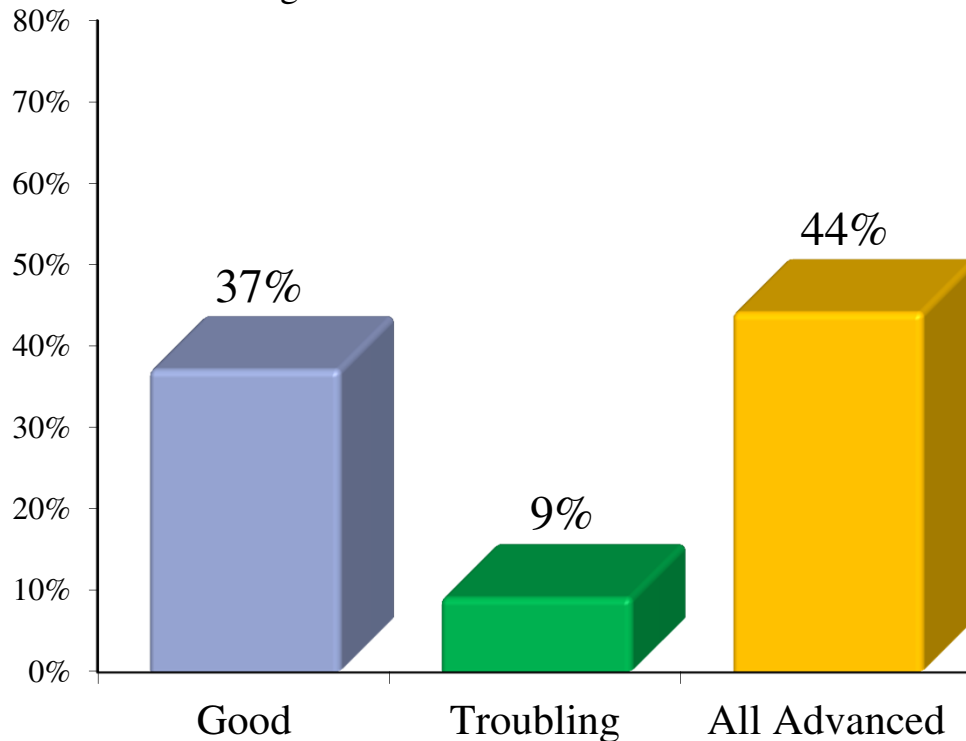
\*Questions split-sampled



# Most Don't Want To Hear About "Advanced Manufacturing"

Government officials are considering what policies might be appropriate to support advanced manufacturing in the U.S. Which of the following statements comes closest to your view?

- that's a good thing, advanced manufacturing is the key to our economy's future
- that's troubling as it probably means that they are going to abandon basic manufacturing
- all manufacturing is advanced, they need to stop trying to come up with new language and focus on strengthening all of manufacturing



	Good	Troubling	All Advanced
Democrat ID	41%	7%	43%
Independent ID	35%	11%	42%
Republican ID	36%	10%	47%
Male	37%	8%	46%
Female	38%	10%	42%
Under 50	36%	11%	44%
50+	39%	7%	44%
High School or Less	39%	7%	45%
Some College	35%	11%	43%
College Grad+	38%	9%	44%
Northeast	36%	12%	41%
South	34%	7%	48%
Midwest	40%	9%	41%
West	38%	9%	46%
White	37%	9%	45%
Black	45%	12%	37%
Hispanic	45%	6%	44%
Union Household	38%	5%	50%
Non-Union hhold	37%	10%	43%
Manuf hhold	31%	9%	50%
Non-Manuf hhold	39%	9%	43%

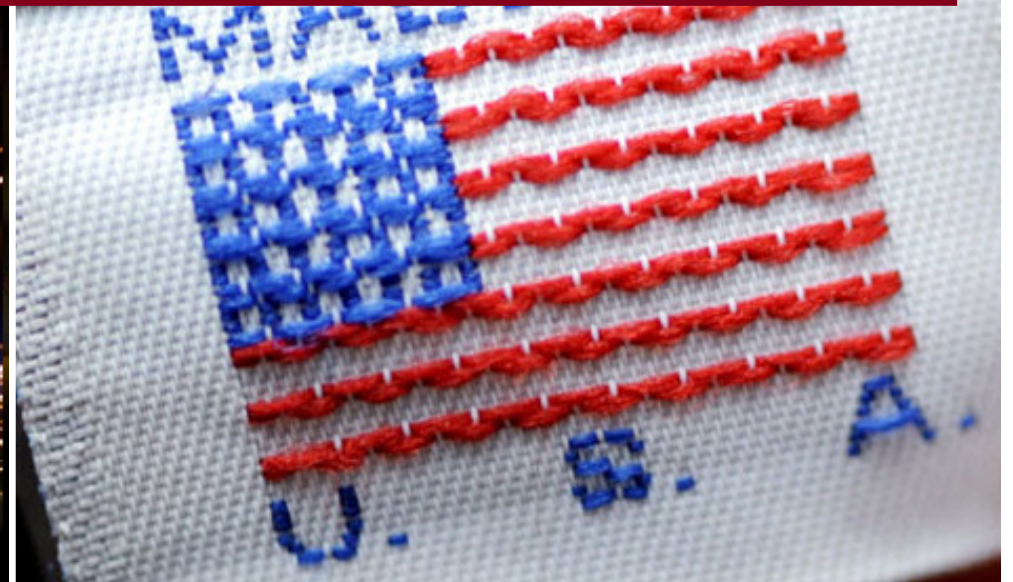




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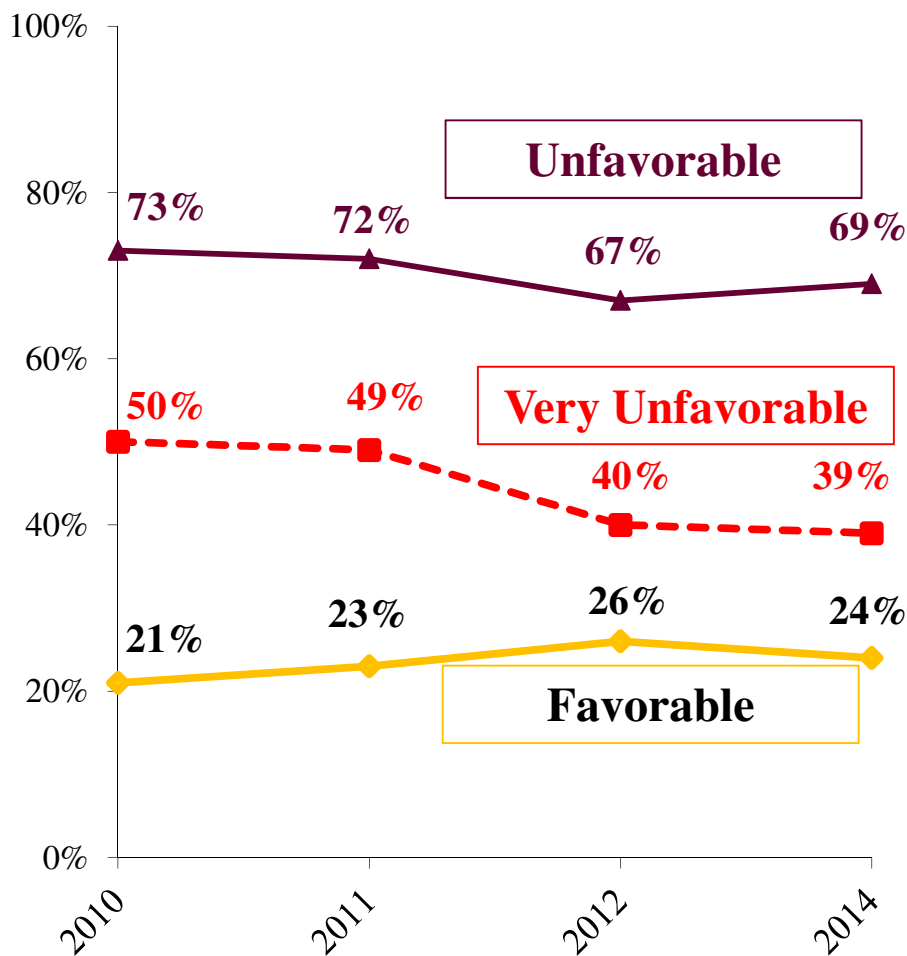
**China Is A Serious Problem That Needs To Be Addressed, Not Ignored**



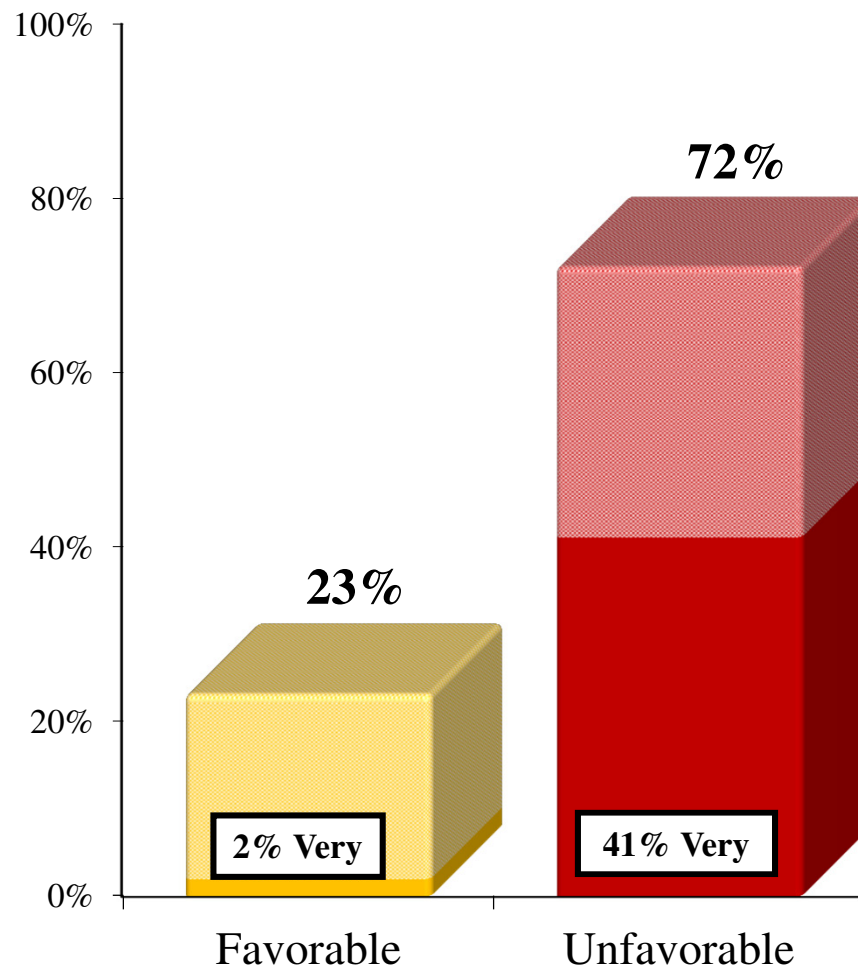


# Products And Goods Made In China Are Viewed Quite Unfavorably

**Manufactured Goods Made In China**  
Favorability



**Products Made In China**  
Favorability



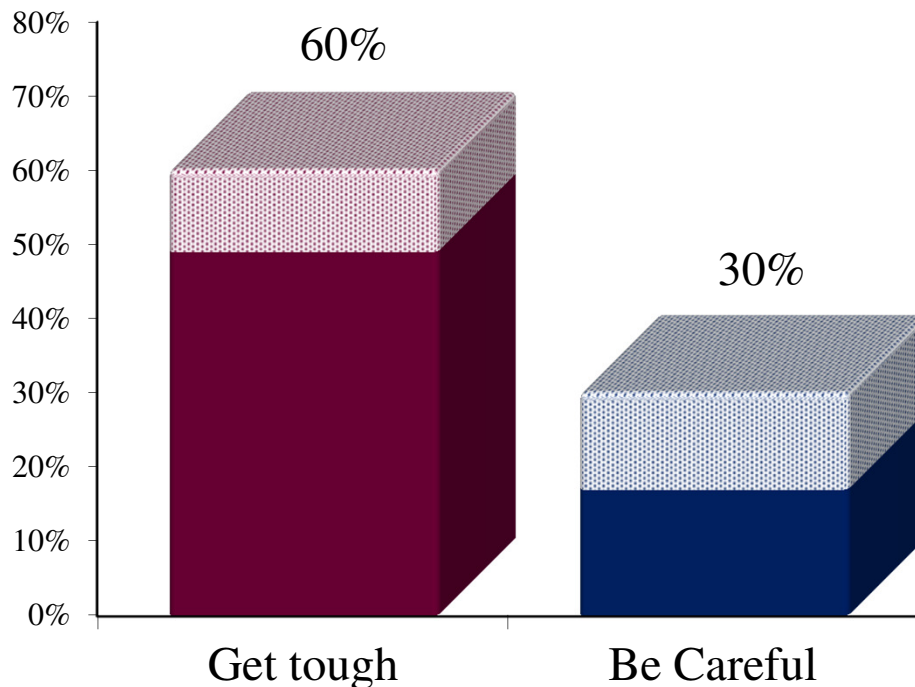
\*Questions split-sampled



# Majorities Across All Demographics Want To See The U.S. Get Tough With China And Japan To Stop Unfair Trade

*Which comes closer to your point of view?*

- We need to get tough with China and Japan and use every possible legal means to stop their unfair trade practices, including currency manipulation which will keep undermining our economy and taking away our jobs unless we get tough now.
- We don't want to start a trade war with China and Japan. Tariffs and trade wars led to the Great Depression and China and Japan are huge markets for American goods with three times more consumers than we have in America.



	Get Tough	Tread lightly
Democrat ID	58%	33%
Independent ID	58%	31%
Republican ID	64%	26%
Male	62%	29%
Female	58%	31%
Under 50	56%	36%
50+	63%	26%
High School or Less	66%	23%
Some College	58%	30%
College Grad+	58%	33%
Northeast	66%	25%
Midwest	55%	33%
South	63%	29%
West	55%	34%
White	61%	29%
Black	59%	33%
Hispanic	58%	31%
Union Household	60%	30%
Non-Union Household	60%	30%
Manufacturing hhold	70%	21%
Non-Manuf hhold	58%	32%





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# Outsourcing Is The Most Important Cause Of Lost Manufacturing Jobs

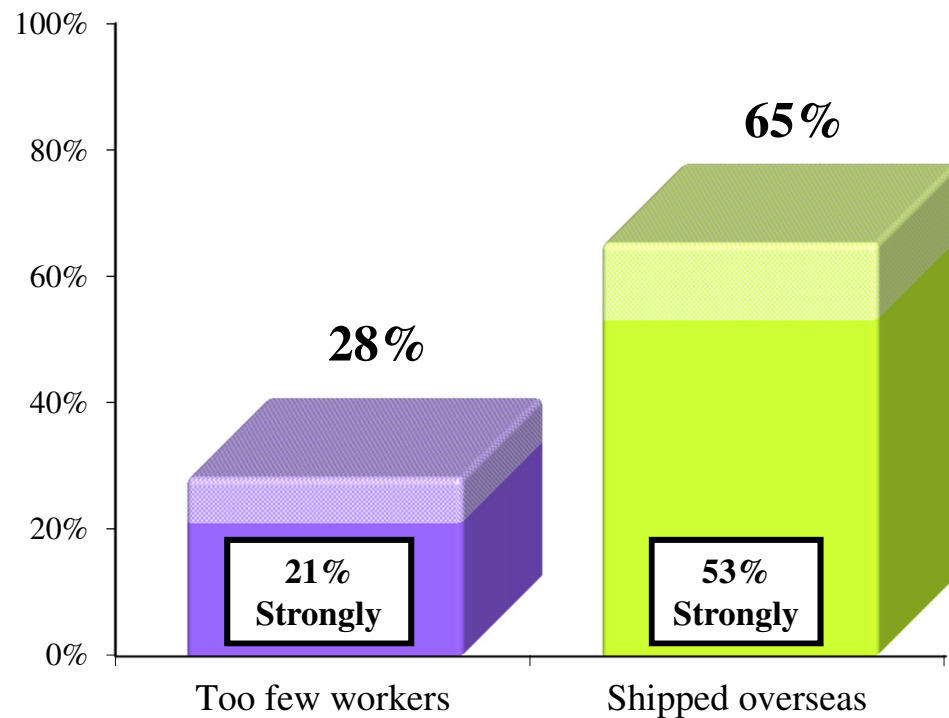




# Outsourcing, Rather Than Skill Shortages, Are Seen As The Primary Reason We Lack New Manufacturing Jobs

Which of the following statements comes closer to your point of view?

- The main reason that few jobs have been created in manufacturing recently is that there are few skilled workers who could fill those positions.
- The main reason that few jobs have been created in manufacturing recently is that too many of those jobs have been shipped overseas.



	Favor	Oppose
Democrat ID	25%	70%
Independent ID	32%	61%
Republican ID	27%	65%
Male	34%	58%
Female	22%	71%
Under 50	29%	65%
50+	27%	66%
High School or Less	31%	65%
Some College	26%	68%
College Grad+	28%	64%
Northeast	24%	73%
Midwest	30%	63%
South	31%	65%
West	25%	61%
White	28%	65%
Black	29%	68%
Hispanic	28%	66%
Union Household	27%	68%
Non-Union Household	28%	64%
Manufacturing hhold	30%	66%
Non-Manuf hhold	28%	65%



# Most In The Groups Felt Outsourcing Is The Main Problem

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“I mean, does it matter if they are trained or not if you are going to be getting them overseas because they are cheaper?” – KY 18-29

“I don’t think has to do with really skilled workers. There are skilled workers over in China. They are just people like us. They just work cheaper.” – KY 30+

“It’s an employer’s market in everything. They’re whining about not being able to find skilled workers but they’re not willing to take on people that don’t have five years of experience. What do you do?” – Portland Group 1

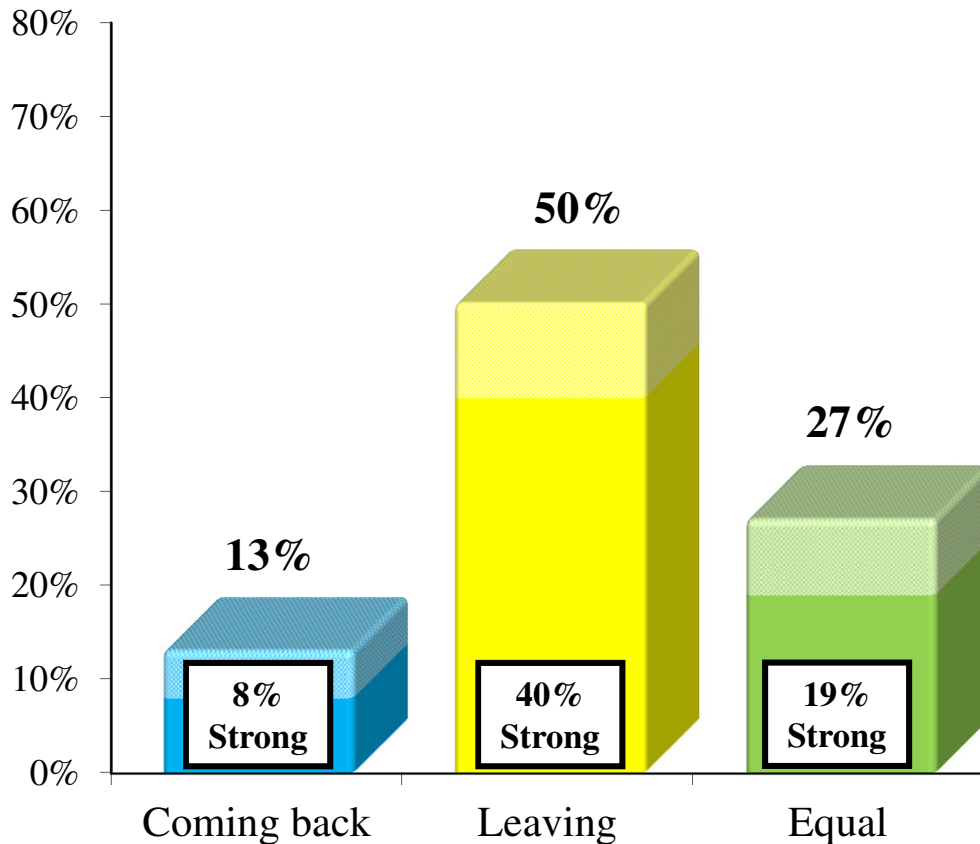
“I would say the economy is not strong enough because too many of these have been shipped overseas rather than the other way around.” – IA Manuf.

“Is the reason we’re not training people because we have those jobs, they are outsourced? One has to come before the other. We may not be training people because those jobs are overseas. If we brought them back we would have to train people.” – KY 18-29



# Half Of Voters Believe More Manufacturing Jobs Are Leaving The U.S. Than Returning

Generally speaking, these days would you say more manufacturing jobs are: coming back to the U.S. OR leaving the U.S. for overseas OR are about the same number coming back to and leaving the U.S.?



	Coming	Leaving	Equal
Democrat ID	17%	48%	24%
Independent ID	12%	50%	28%
Republican ID	10%	54%	28%
Male	16%	49%	26%
Female	11%	51%	28%
Under 50	10%	56%	26%
50+	16%	46%	27%
High School or Less	13%	53%	24%
Some College	14%	53%	24%
College Grad+	13%	48%	30%
Northeast	13%	47%	30%
Midwest	17%	47%	25%
South	13%	51%	26%
West	10%	54%	27%
White	13%	50%	26%
Black	17%	47%	26%
Hispanic	14%	56%	22%
Union Household	12%	55%	24%
Non-Union hhold	14%	49%	28%
Manuf hhold	14%	52%	26%
Non-Manuf hhold	13%	50%	27%





# Participants Were Generally Unaware Of Insourcing

*Have you heard of any companies coming back to the U.S.?*

“No unfortunately I hear about too many leaving. I heard some isolated stories, but I think the overall story is they continue to go.” – OR Non-Manuf.

Just last week there was an article, news flash, or something about it. I can't for the life of me think what it was. They were shutting down everything in Mexico and coming back north – IA Manuf.

“There probably are [mfg jobs coming back]. I can't think of any.” – KY 18-29

“[Manufacturing jobs are] pretty quick to leave and slower to come back.” – KY 30+

“There are more temporary [manufacturing] jobs available than there are full-time jobs and full-time jobs that pay well. There is work out there but it's not like it used to be.” – IA Manuf.

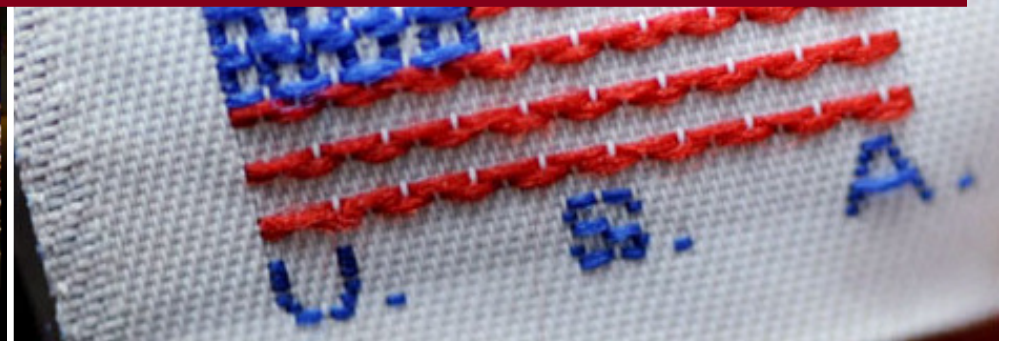
“Manufacturing has virtually disappeared in this country. It may be on the way back someday, but I can't think of anything that's manufactured now except for cars. All the electronics are gone. The shoe industry is gone. The textile industry is gone.” – KY 30+





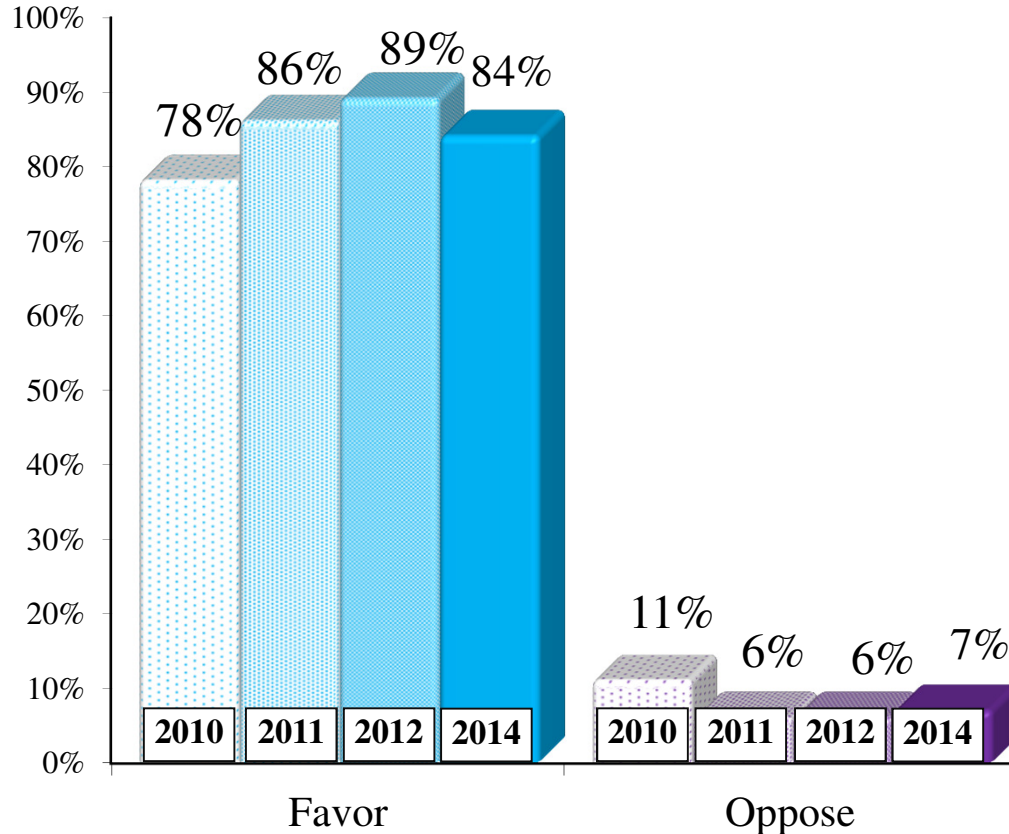
## **Voters Support A Manufacturing Agenda, Including:**

- Worker Training Programs
- Tougher Trade Policies
- Keeping Tax Dollars Here
- Incentivizing Moving Jobs Back To The US



# A National Manufacturing Strategy Is Supported By Very Large Majorities Across Subgroups

Some have proposed a national manufacturing strategy to make sure that economic, tax, education 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	87%	5%
Independent ID	82%	8%
Republican ID	82%	9%
Male	84%	9%
Female	84%	6%
Under 50	84%	8%
50+	83%	7%
High School or Less	83%	9%
Some College	86%	7%
College Grad+	83%	7%
Northeast	85%	8%
Midwest	82%	9%
South	86%	6%
West	82%	7%
White	84%	7%
Black	88%	5%
Hispanic	83%	11%
Union Household	86%	7%
Non-Union Household	84%	7%
Manufacturing hhold	89%	6%
Non-Manuf hhold	83%	8%





# Focus Group Participants Want To See The Government Act To Save Manufacturing

“You can use economic tools, market tools to protect. You can create an environment or create again a level playing field. Just the same tools... I’m not advocating big government. I’m just saying there are tools to protect our market, especially around people dumping.” – OR Manuf.

“I think [government intervention] would stop the gap from widening between the poor and the wealthy. It would bring more of a middle class.” – KY 18-29

“I just think it would help build the economy, even though it’s up and down, maybe it would just help things along.” – IA Non-Manuf.

“Show people that the government is actually trying to do something instead of letting everything go away.” – KY 18-29

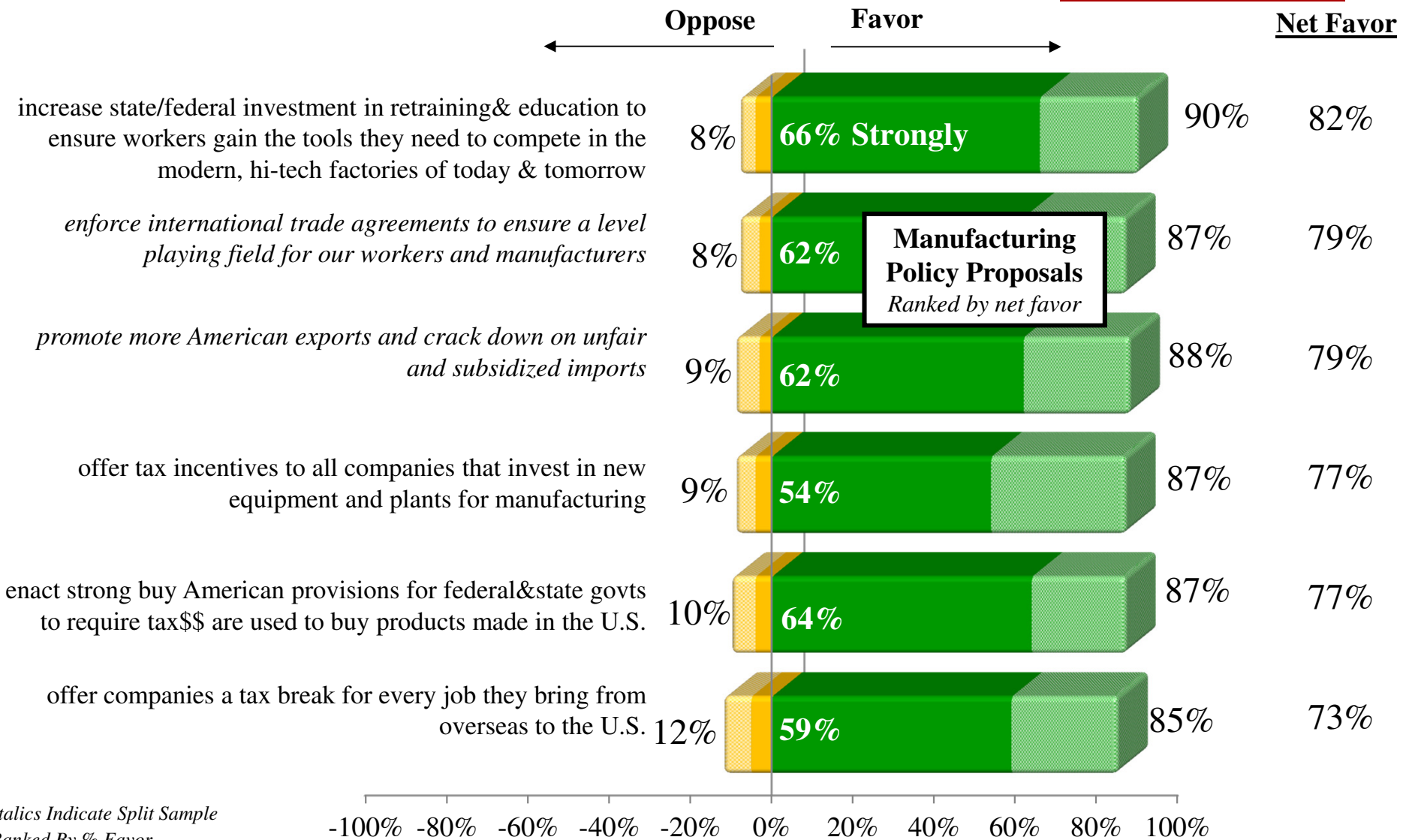
“Our government encouraged in the past manufacturing to be offshore to go off shore. I think that we’ve done some things that have – instead of just being neutral have actively encouraged manufacturing to go away. I think to right that balance I think that we need to do, for a time some things need to be done actively to bring manufacturing back to undo what was done.” – KY 18-29

“You mean subsidies and stuff like that? I think if it’s done in the correct fashion it can help, but it can’t be on the backs of the middle class and the lower class anymore. That’s what’s been happening, especially here in Kentucky. We offer so many subsidies and tax allowances, free rent, for years and years. The only reason we kept forward is because of giving free rent.” – KY 30+

“Government doesn’t do enough to protect our market.” – OR Manuf.



# All Policy Proposals Received Majority Support, With Retraining And Education And Trade Policy Topping The List

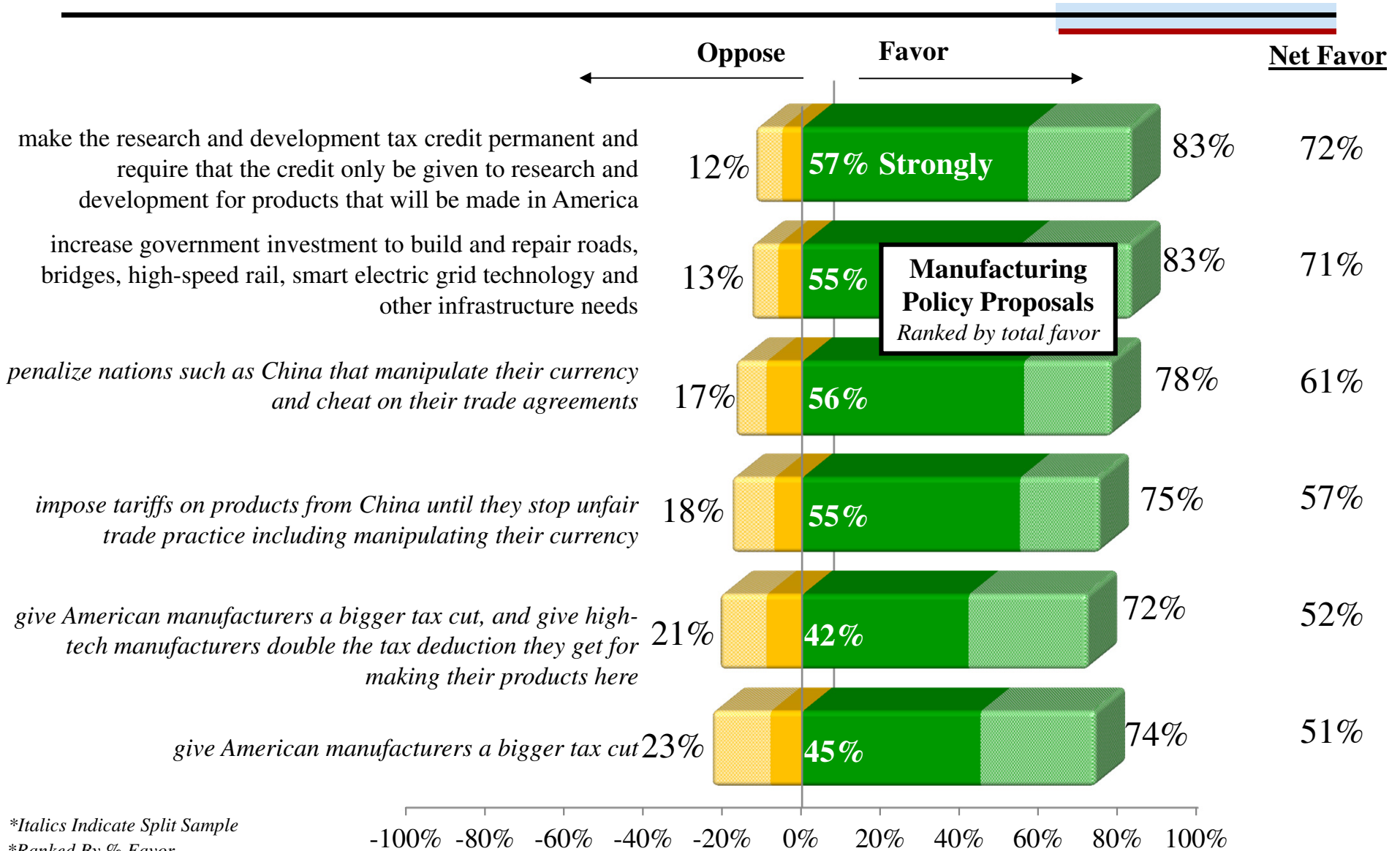


\*Italics Indicate Split Sample

\*Ranked By % Favor



# Giving American Manufacturers A Bigger Tax Cut Garnered Less Support But Little Opposition



*\*Italics Indicate Split Sample*

*\*Ranked By % Favor*



THE MELLMAN GROUP



NORTH STAR OPINION RESEARCH

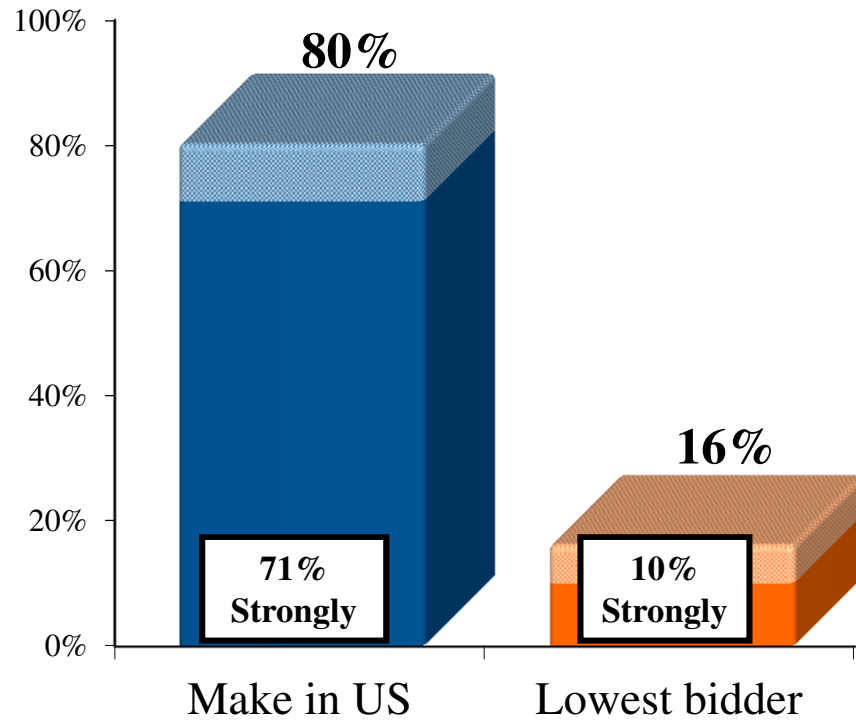


# Even After Arguments For And Against Buy American Policies, Voters Overwhelmingly Demand Them

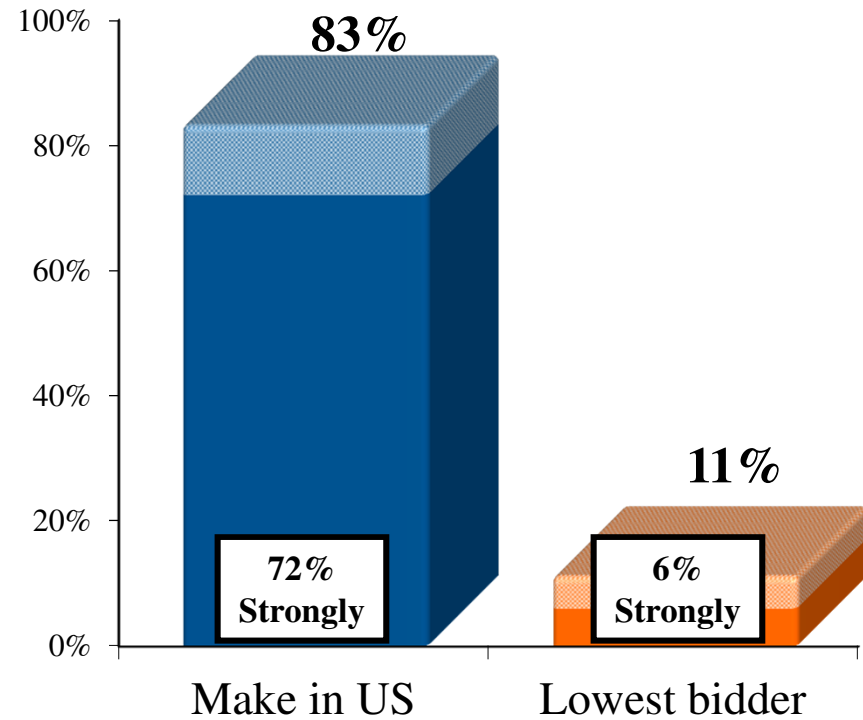
Which comes closer to your point of view?

- Large infrastructure projects that are paid for with taxpayer money, like the San Francisco Bay Bridge, should be built in America, by American workers, using American steel and other products, so that we know it is structurally sound and so we can create more American jobs instead of having our tax money create jobs in foreign countries.
- With state and local governments facing huge deficits, with taxes too high, and with education and public safety already being cut, large infrastructure projects, like the San Francisco Bay Bridge, should be built by the lowest bidder, regardless of where the low bidder is getting their products, so we can make the most efficient use of our tax dollars.

With Underlined Language



Without Underlined Language



\*Questions split-sampled



# Support For Top Proposals Spans Party

Democrats Are More Likely To Support Infrastructure, While Republicans Are Slightly Less Supportive Of Retraining

<b>Top Manufacturing Policy Proposals</b> <i>(Ranked by net favor) *Italics indicate split-sample</i>	<b>Total</b>	<b>Dem</b>	<b>Ind</b>	<b>GOP</b>
increase state/fed investment in retraining & education...to ensure workers gain the tools they need to compete in modern, hi-tech factories of today& tomrrw	82%	91%	82%	72%
<i>enforce international trade agreements to ensure a level playing field for our workers and manufacturers</i>	79%	87%	74%	76%
<i>promote more U.S. exports and crack down on unfair trade, subsidized imports</i>	79%	75%	85%	77%
offer tax incentives to all companies that invest in new equipment and plants for manufacturing	77%	82%	74%	76%
enact strong buy American provisions for our federal and state governments, to require that tax dollars are used to buy products made in the U.S.	77%	81%	75%	75%
offer companies a tax break for every job they bring from overseas to the U.S.	73%	74%	72%	74%
make the research and development tax credit permanent and require that the credit only be given to r&d for products that will be made in America	72%	74%	72%	70%
increase government investment to build and repair roads, bridges, high-speed rail, smart electric grid technology and other infrastructure needs	71%	87%	67%	56%
<i>penalize nations such as China that manipulate their currency and cheat on their trade agreements</i>	61%	59%	56%	69%
<i>impose tariffs on products from China until they stop unfair trade practice including manipulating their currency</i>	57%	51%	58%	64%
<i>give American manufacturers a bigger tax cut, and give high-tech manufacturers double the tax deduction they get for making their products here</i>	52%	47%	49%	60%
<i>give American manufacturers a bigger tax cut</i>	51%	41%	51%	63%

# Strategic Conclusions

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- If you aren't focused on jobs, you aren't focused on voters' top priority
- If you're talking about manufacturing you are talking about jobs – and the irreplaceable source of American economic strength
- If you focus on “advanced manufacturing” you're missing the boat
- Even if you are talking about manufacturing jobs, many people aren't hearing you and others are not hearing it as credible
- To be credible, be specific and concrete:
  - Buy American policies
  - Tough trade enforcement, particularly with China
  - Investment in training and retraining
  - Incentives to keep manufacturers here and bring more back





ALLIANCE FOR  
american  
manufacturing

