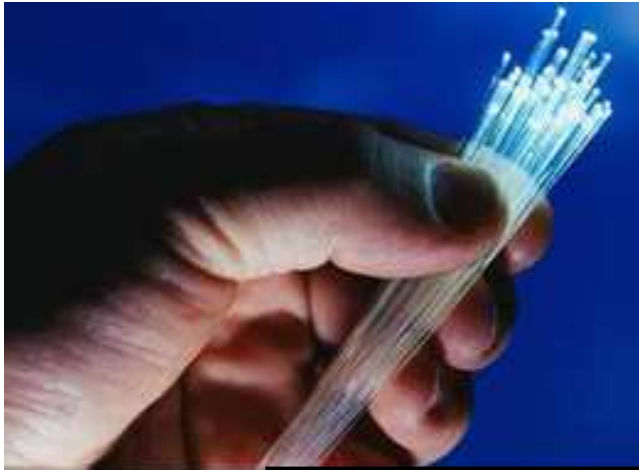
A hand is shown from the top, placing a white envelope into a tan cardboard ballot box. The box is open, and the envelope is partially inserted. The background is a solid blue color.

**AAM 2010
National Survey**
of Likely Voters
on Manufacturing
and America's Global
Economic Standing

ALLIANCE FOR
american
manufacturing

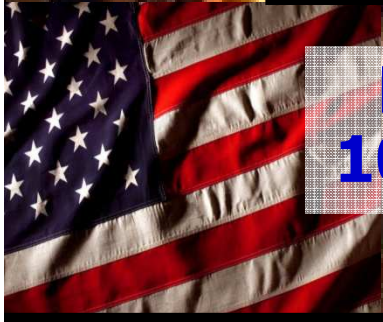


Alliance for American Manufacturing



Keeping America Strong

Presentation To The Alliance For American Manufacturing



Findings From A Nationwide Survey Of 1000 Likely 2010 General Election Voters




THE
MELLMAN
Group

RESEARCH
BASED
STRATEGY

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Key Findings

- Voters Are Anxious About The Economy—Specifically China Debt, Spending And Loss Of Manufacturing
- Voters Want Washington To Focus On Manufacturing, But Feel Working People Who Make Things Are Being Forgotten
- Voters Believe Manufacturing Is Central To Our Economic Strength
- Our Declining Manufacturing Sector Leads Americans To Believe We Are No Longer The World's Strongest Economy—A Title They Want To Regain
- There Is A Strong Preference For American Goods And A Strong Distaste For Goods Manufactured In China
- Majorities Favor Increased Support For Manufacturing, Including A National Manufacturing Strategy
- Voters' Economic Solutions Center On Trade Enforcement, Clean Energy, Tax Credits For Manufacturing And Replacing Aging Infrastructure Using American Materials



Methodology

- P
O
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L**
- 1000 Likely 2010 General Election Voters
 - Conducted April 22-26, 2010
 - Margin Of Error +/- 3.1% (Higher For Subgroups)

- F
O
C
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S
S**
- 2 Groups of Voters with Income Not Dependent On Manufacturing (Divided by Education)
 - 2 Groups of Voters with Income Dependent On Manufacturing (Divided by Gender)
 - 2 Groups of Voters (Divided by Gender)
 - Conducted March 8th, 10th, and 15th in Richmond, VA, Chicago, IL, and Los Angeles, CA

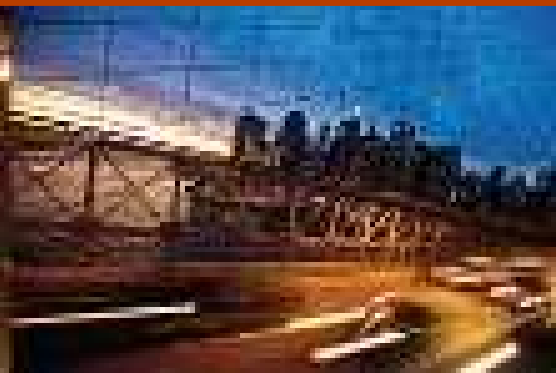




Voters Are Anxious About The Economy—Specifically China Debt, Spending And Loss Of Manufacturing



E Pluribus Unum
Cut of many, one

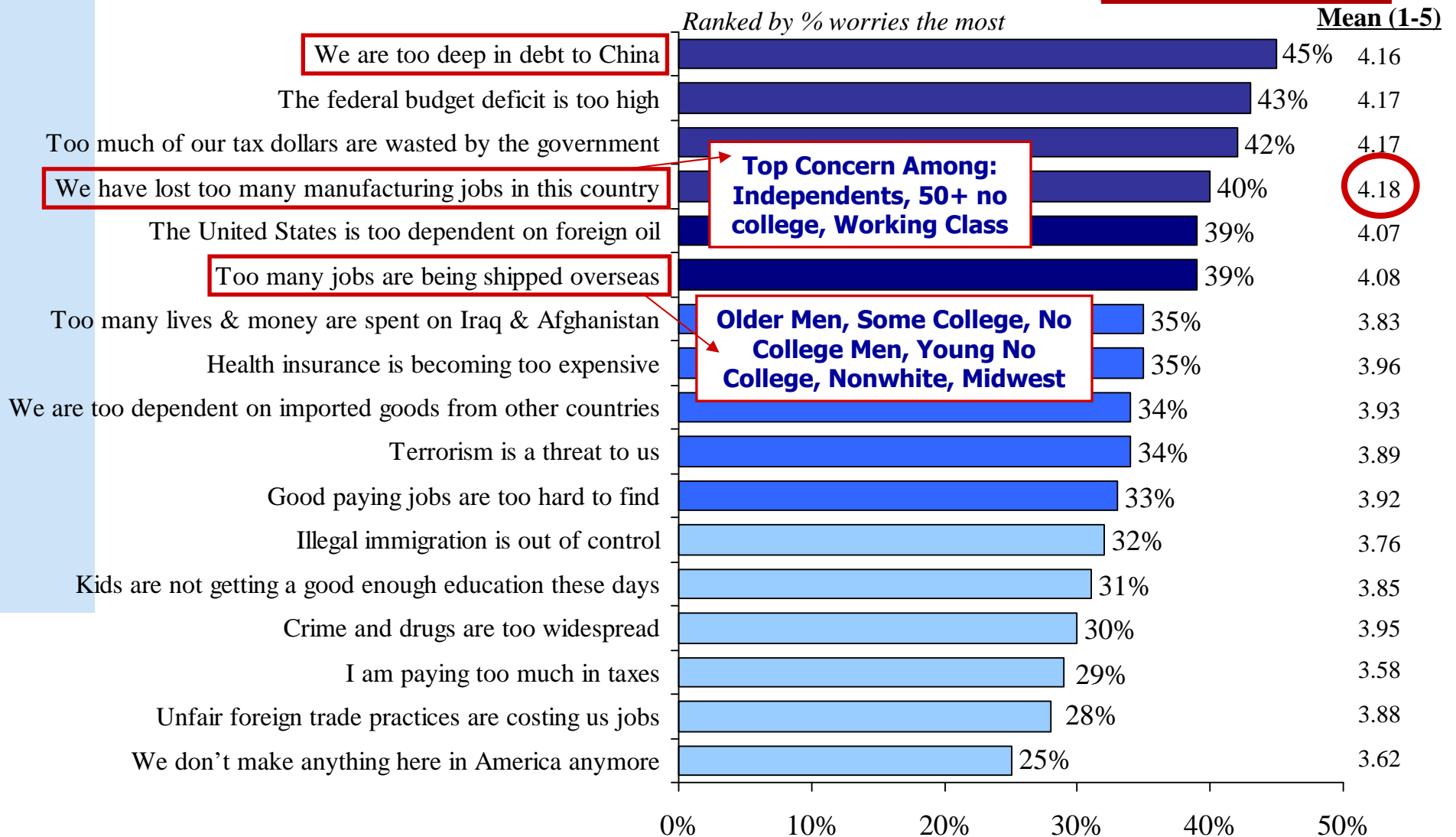


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Debt To China, Government Waste, And The Loss Of Manufacturing Jobs Top Voters' Personal Concerns

Loss Of Manufacturing Generate The Most Concern On Average

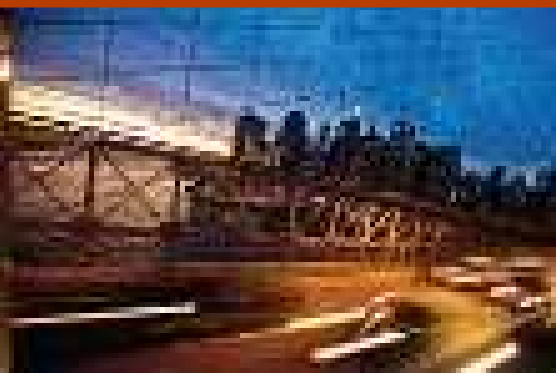




Voters Want Washington To Focus On Manufacturing But Feel Working People Who Make Things Are Being Forgotten



E Pluribus Unum
Cut of many, one



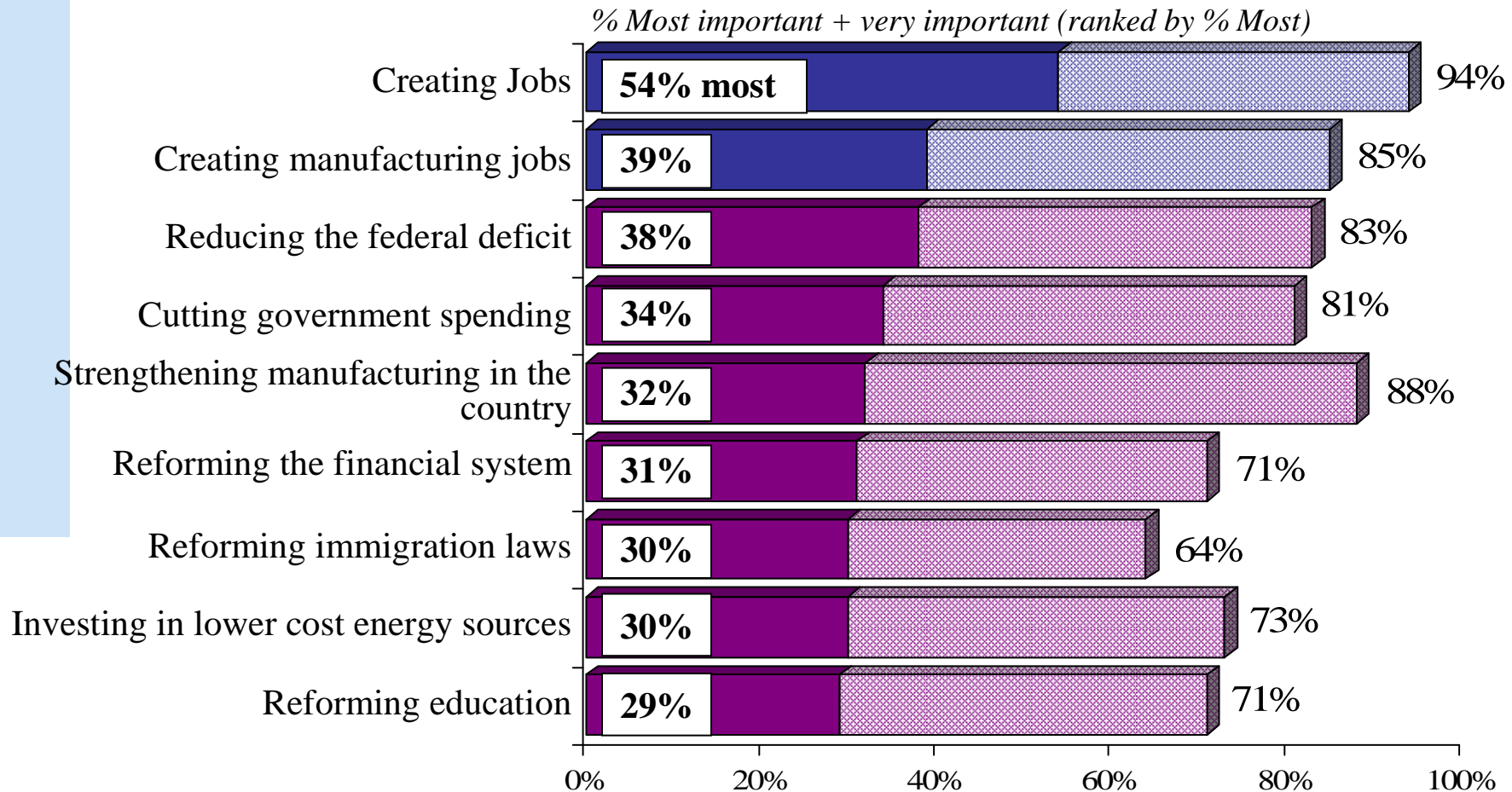
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Voters Want Washington To Focus On Jobs, Specifically In Manufacturing, Even More Than On The Deficit

Manufacturing Is A Higher Priority Than Financial Reform Or Immigration

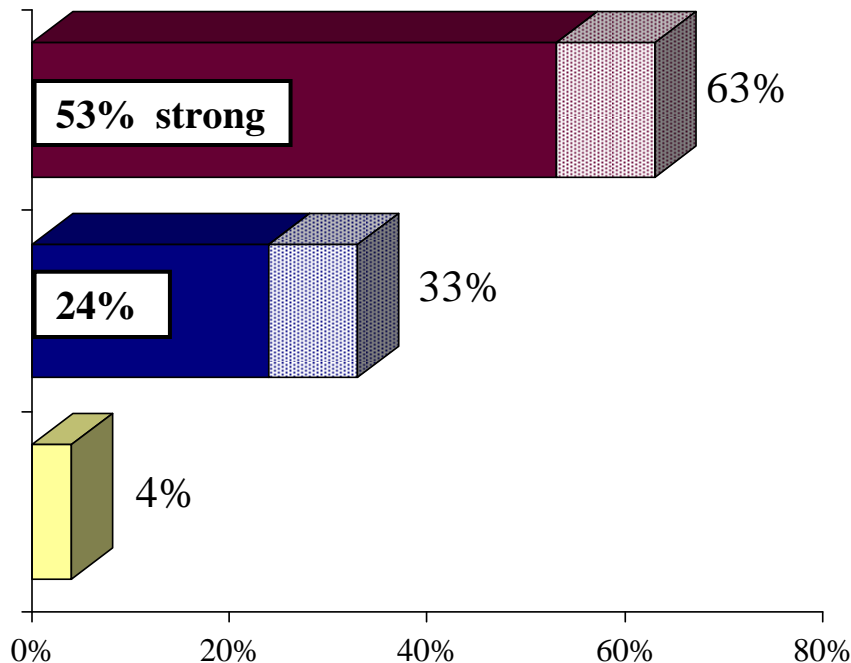
I'm going to list some things Congress and the President could work on this year. After each, please tell me whether you think that particular issue is one of the most important things for [them] to work on, very important, somewhat important or not too important at all.



Relatively Few Believe Obama And Congress Are Focused On Jobs And The Economy

Which comes closer to your point of view?

- This Administration and Congress have spent too much time and energy bailing out Wall Street banks and not enough time worrying about working people who make things for a living.
- This Administration and Congress are trying to create jobs, improve the economy, and help working people.

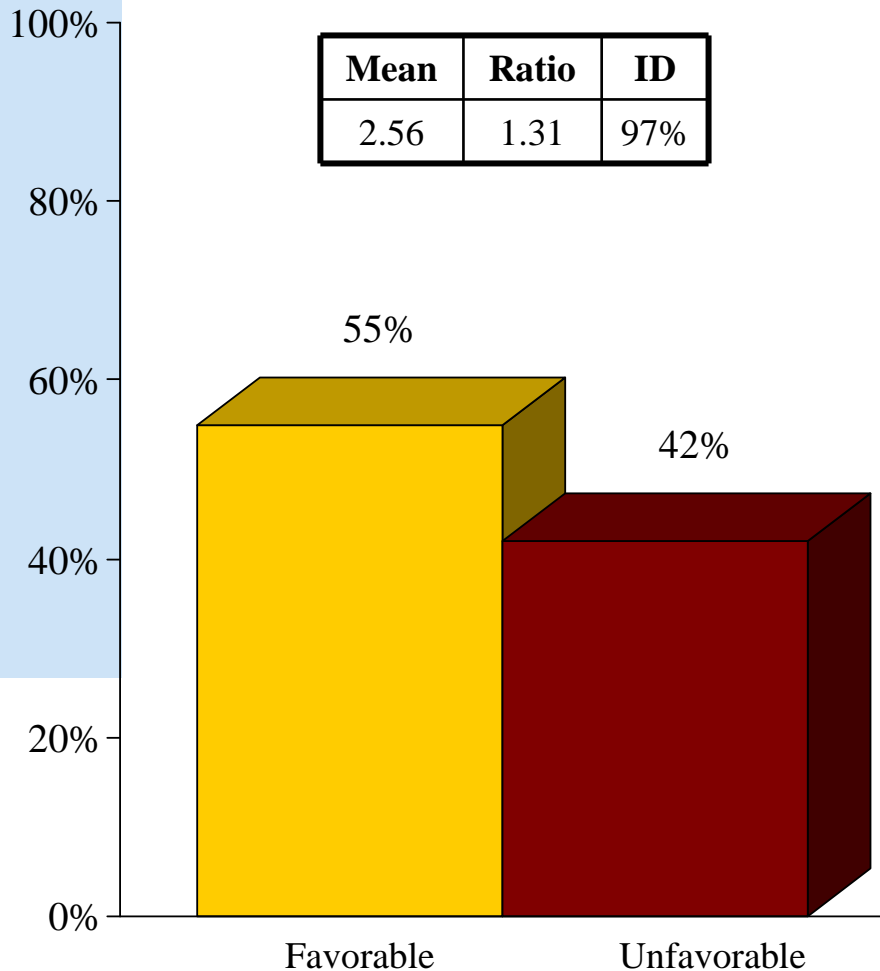


	Not Worried	Trying To Help
Democrat ID	44%	53%
Independent ID	66%	30%
Republican ID	82%	14%
Tea Party Supporters	83%	14%
Tea Party Opponents	42%	55%
Union HH	52%	46%
Non-Union HH	65%	31%
Young women	66%	31%
Young men	62%	33%
Older women	64%	33%
Older men	62%	35%
Upper class	63%	32%
College middle class	56%	39%
Non-college middle class	64%	33%
Lower	68%	31%
Northeast Region	58%	40%
Midwest Region	65%	33%
South Region	67%	29%
West Region	62%	33%



President Obama Is Well Regarded, Though Manufacturing Households Are Far Less Favorable Than Others

Barack Obama's Favorability

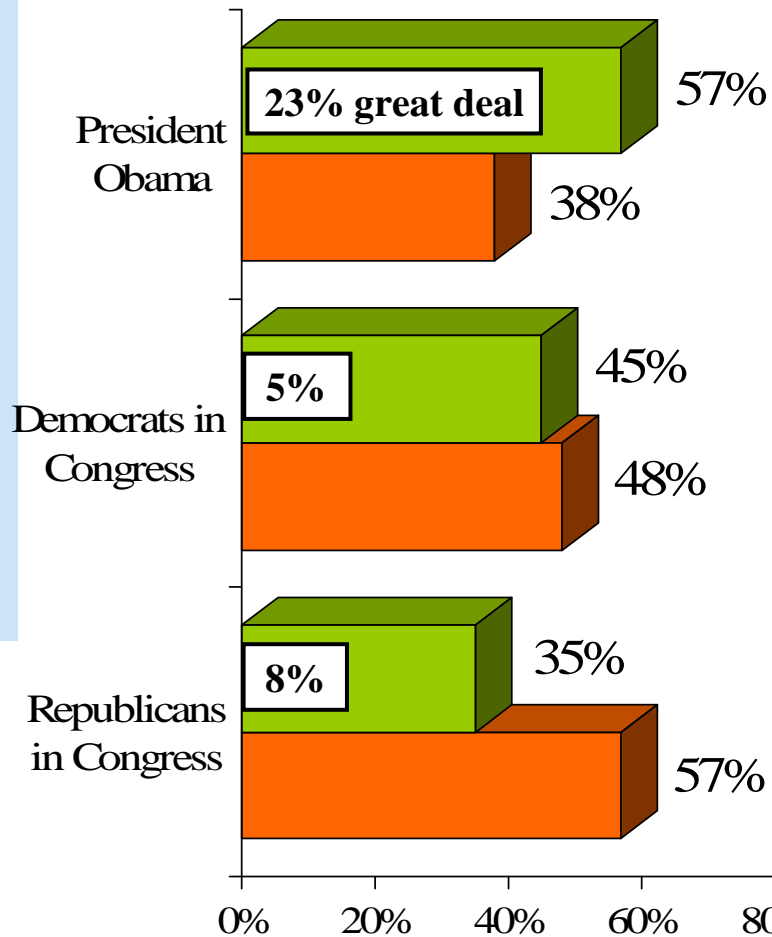


	Fav	Unfav
Democrat ID	88%	10%
Independent ID	52%	42%
Republican ID	20%	78%
Tea Party Supporters	22%	76%
Tea Party Opponents	86%	12%
Manufacturing HH	46%	48%
Non-Manufacturing HH	57%	40%
Union HH	66%	32%
Non-Union HH	53%	44%
Young women	62%	36%
Young men	57%	39%
Older women	52%	44%
Older men	47%	51%
Upper class	53%	45%
College middle class	58%	41%
Non-college middle class	54%	42%
Lower class	55%	40%
Northeast region	60%	38%
Midwest region	55%	41%
South region	49%	47%
West region	58%	40%

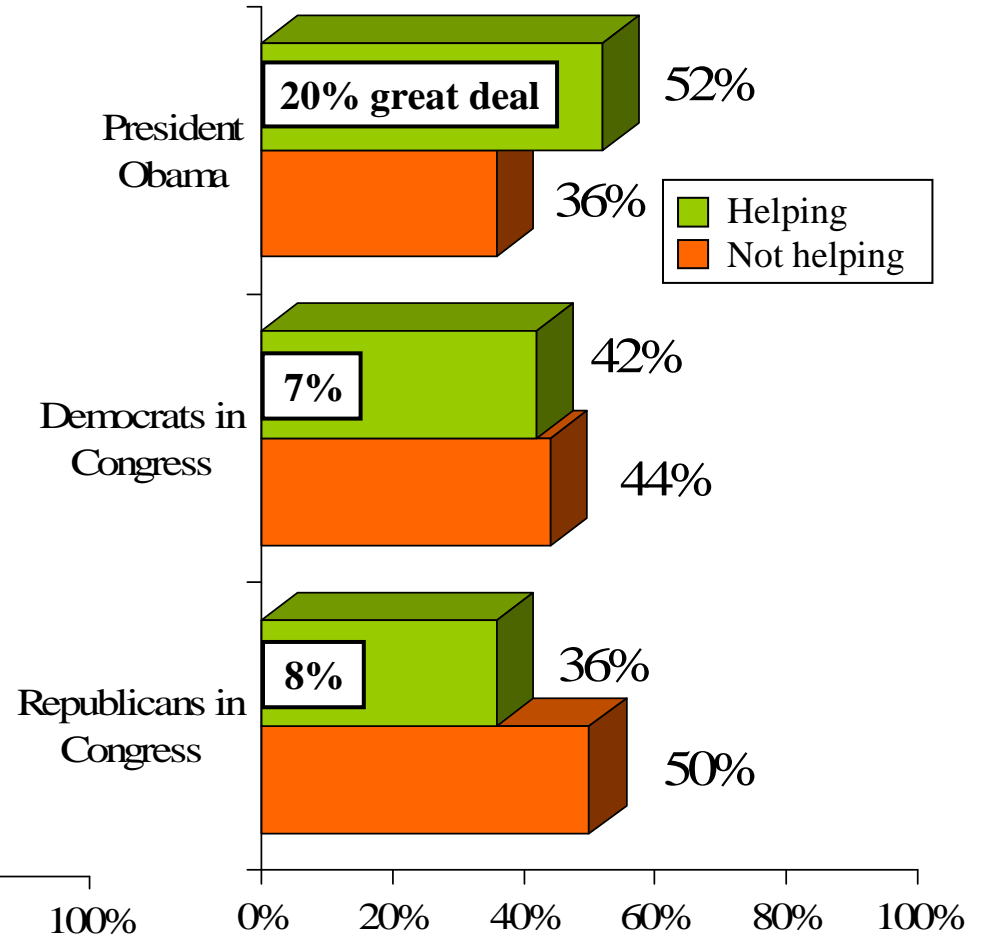


Anemic Majorities See President Obama Helping Manufacturing, While Pluralities Say Congressional Democrats Are Not, With GOPers Least Likely To Be Seen As Helpful

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

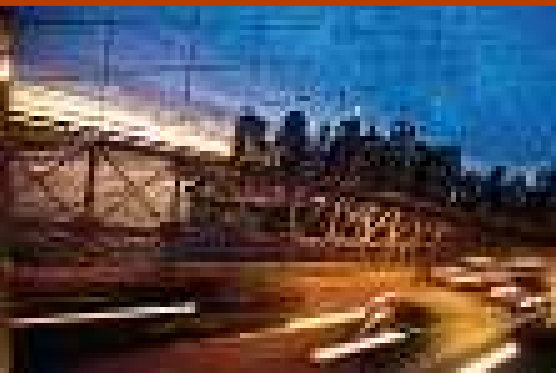


Do you think ___ is/are doing a great deal to enforce fair trade with our trading partners, some, not too much, or nothing at all?





Voters Believe Manufacturing Is Central To Economic Strength And Job Creation



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Focus Group Participants Contend Manufacturing Is Inextricably Linked To Economic Strength

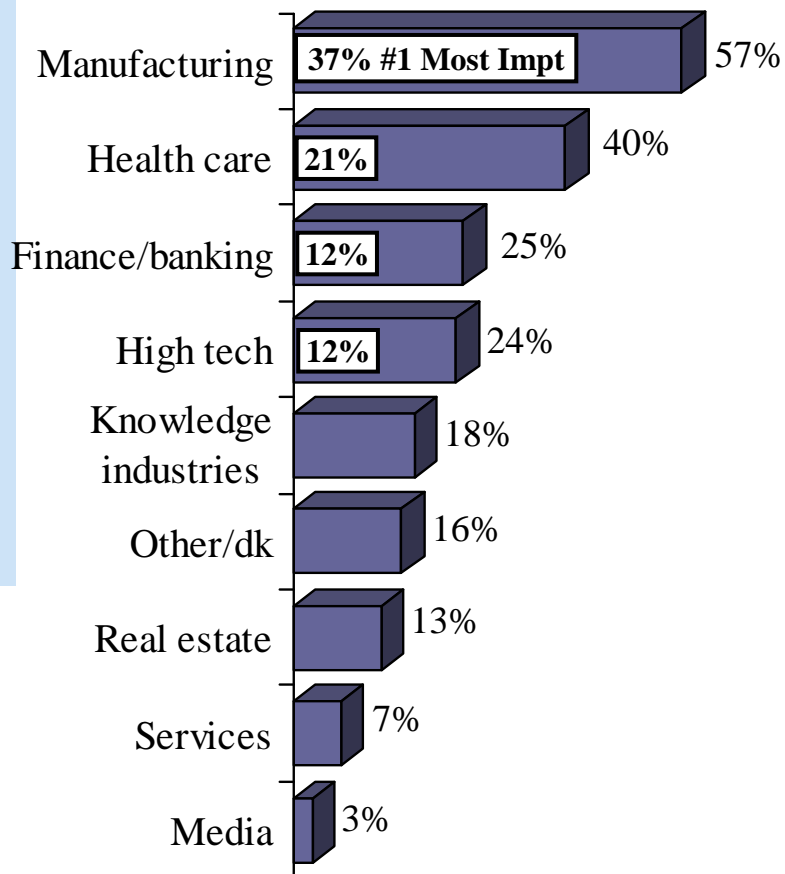
- *If manufacturing is not successful then the economy is not successful* – Chicago Female
- *Manufacturing is a wealth producing activity, it produces wealth.* – Richmond College Educated
- *We are a superpower. If there was no manufacturing here, we will be the last car in the race.* – Los Angeles Male
- *[Without manufacturing] America would eventually cease to exist* – Chicago Female
- *[Manufacturing] puts people to work.*— Los Angeles Male



Manufacturing Is Judged Most Important In Determining Both Our Economic Strength And Our National Security

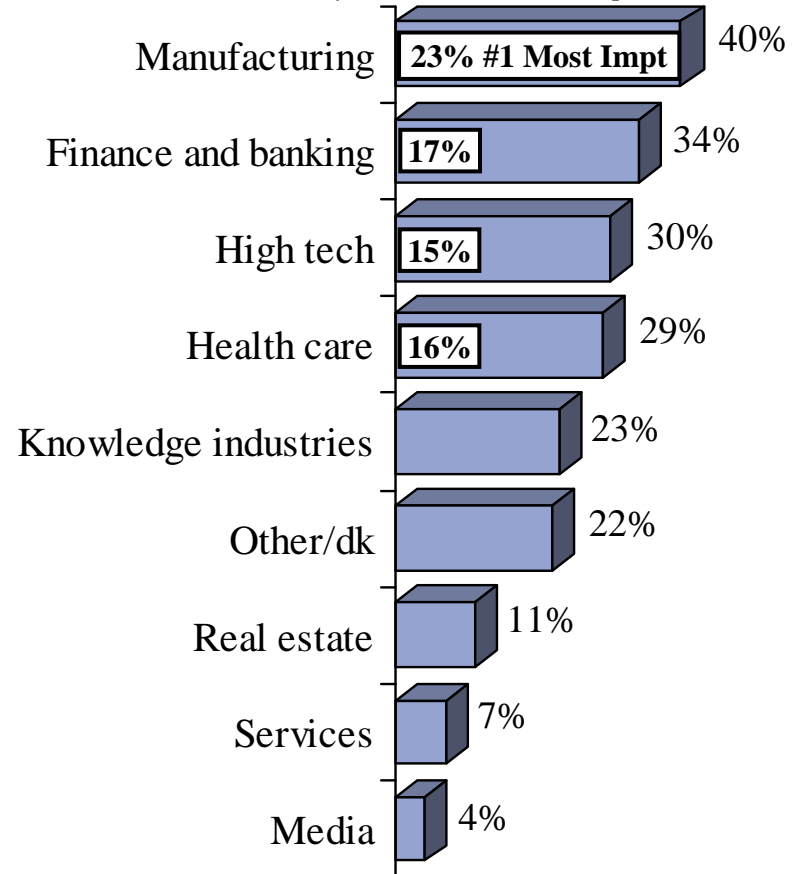
Which of the following industries is most important to the overall strength of the American economy?

Ranked by % 1st & 2nd Most important



Which of the following industries is most important for our national security?

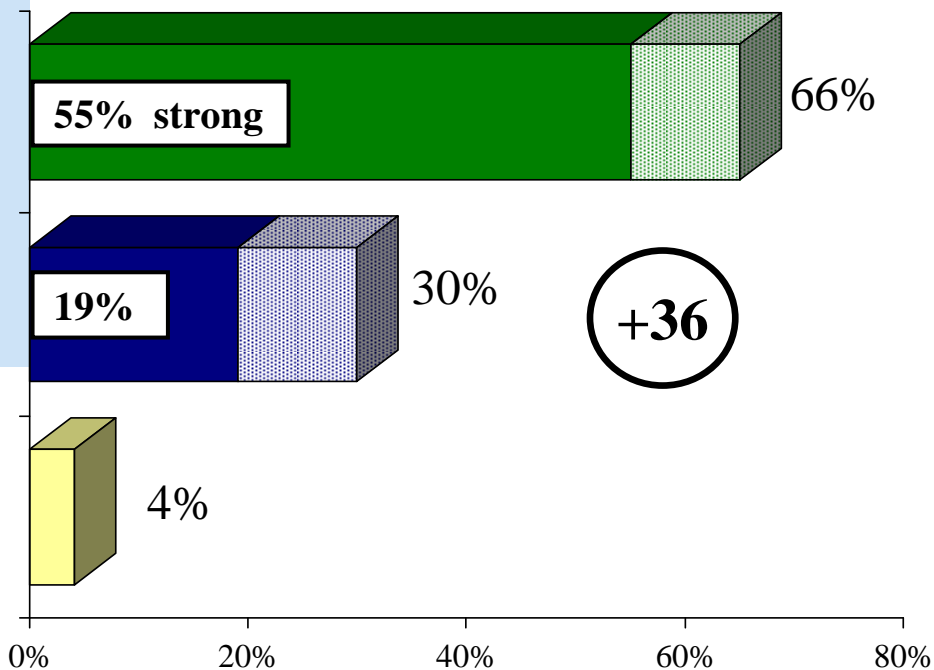
Ranked by % 1st & 2nd Most important



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.



A Majority Agrees Across Demographics		
	Need Manufact'g	New Areas Replace
Democrat ID	67%	30%
Independent ID	64%	31%
Republican ID	66%	29%
Manufacturing HH	68%	29%
Non-Manufacturing HH	66%	31%
Young women	66%	26%
Young men	65%	32%
Older women	71%	26%
Older men	61%	37%
Upper class	62%	38%
College middle class	57%	40%
Non-college middle class	69%	28%
Lower class	73%	22%
Northeast region	65%	32%
Midwest region	69%	24%
South region	71%	25%
West region	55%	42%





Our Declining Manufacturing Sector Leads Americans To Believe We Are No Longer The World's Strongest Economy—A Title They Want To Regain



E Pluribus Unum
Cutlerman, Inc.



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Focus Group Participants Saw Our Economic Strength Dwindling As We Produce Fewer Goods

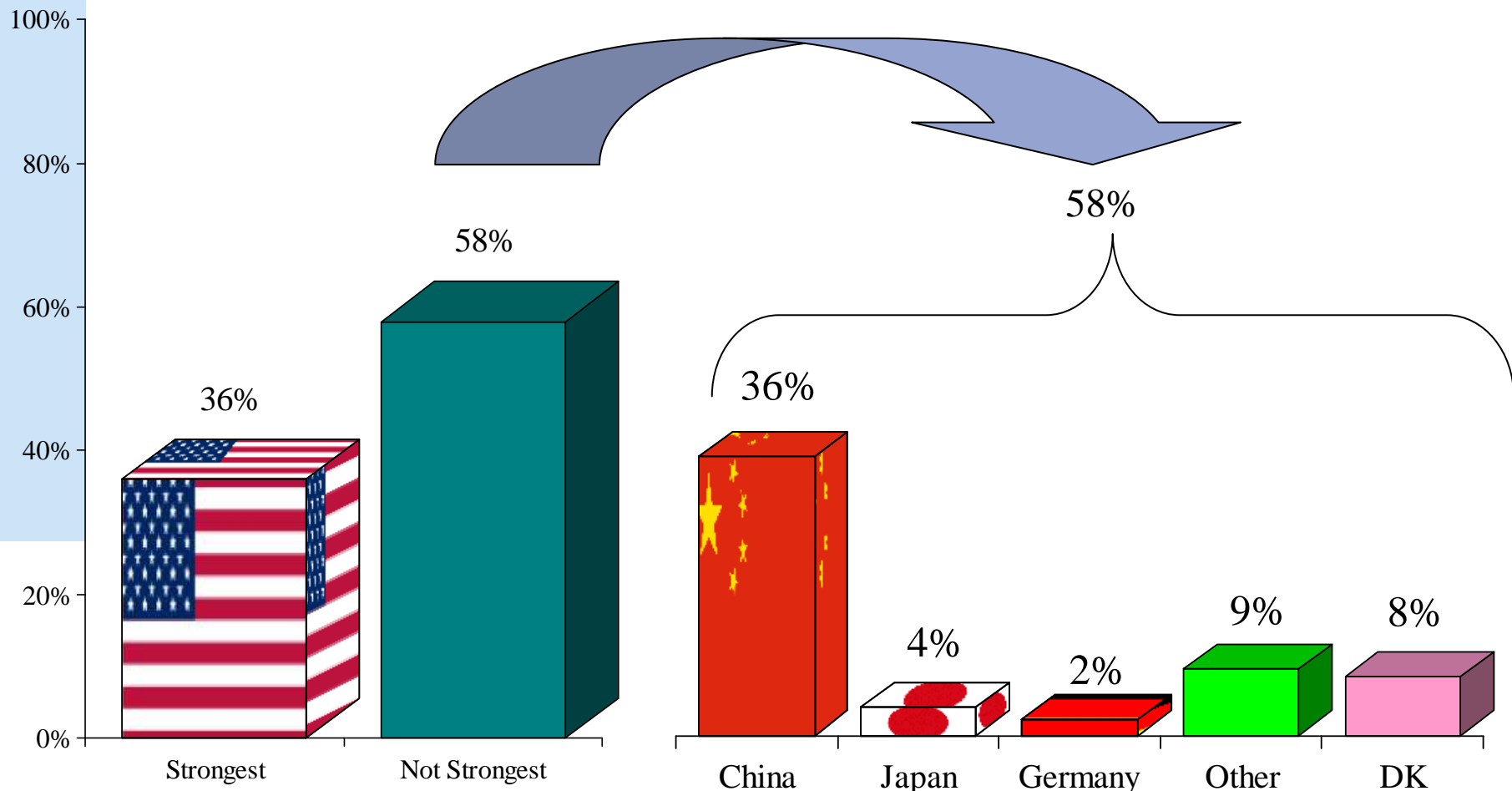
- *We are not a nation of manufacturers, we are a nation of consumers and we are dependent on other countries to exist. – Los Angeles Female*
- *Germany is considered to be, not a Third World country. They seem just as strong in manufacturing... Why are we lagging? Why aren't they lagging? – Los Angeles Male*
- *We're losing our wealth. We're importing at greater costs than we're exporting. People are making a ton of money off us and we're making nothing off of them. – Chicago Female*
- *When you consume more than you produce you become dependent and we are consuming more from other countries than producing our own. Politics makes strange bed fellows, but truly we have become weak and in order to strengthen the economy I think we need to produce more. – Los Angeles Female*
- *We're importing more things, paying other countries to bring it to us. – Richmond Not College*



A Majority Believe The U.S. No Longer Has The World's Strongest Economy, With China Our Chief Competitor

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?

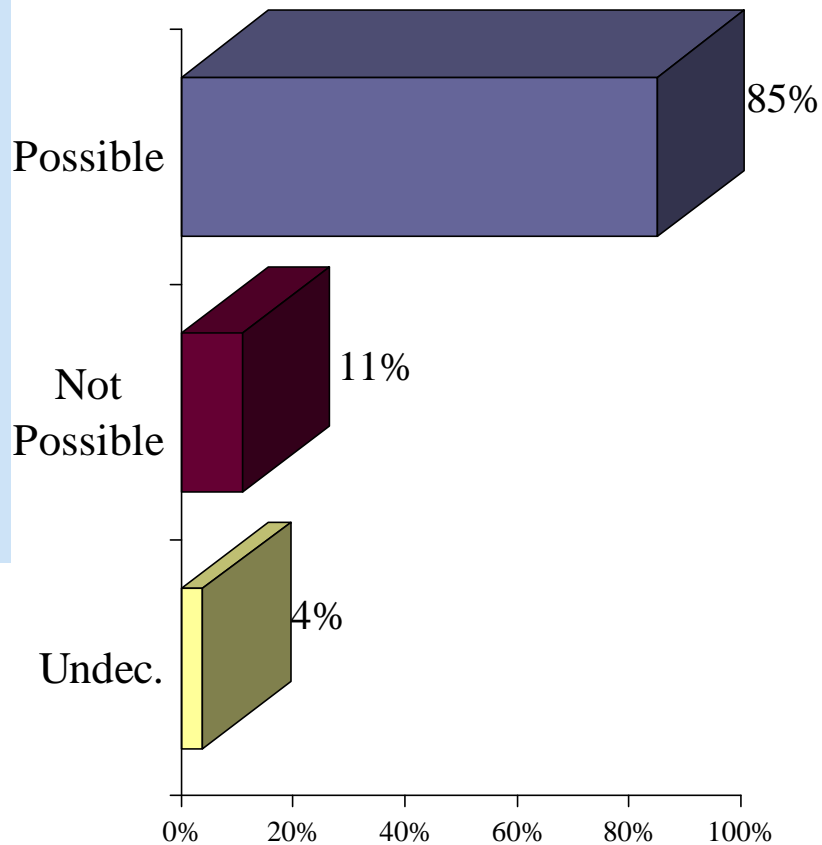
*[Among Not Strongest And Undecideds]
Which country do you think has the strongest economy in the world? [Open Ended]*



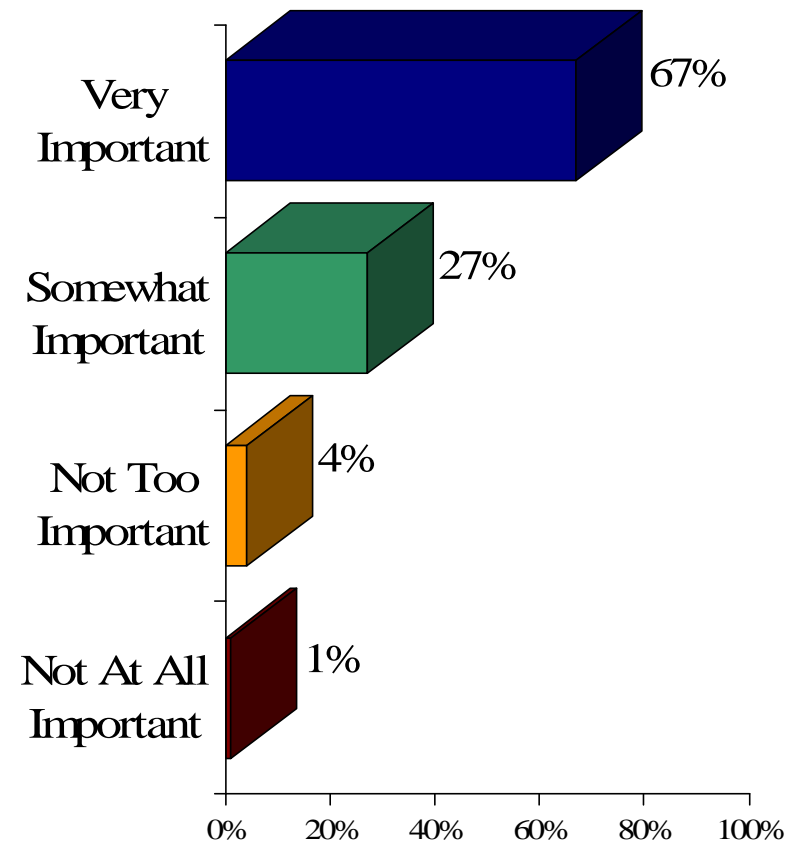
Voters Overwhelmingly Believe It Is Both Possible And Important For The U.S. To Have The World's Top Economy

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?

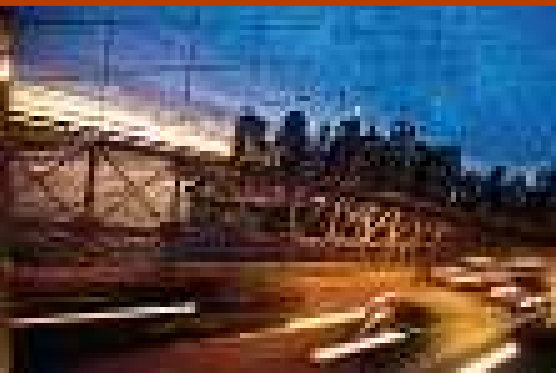


How important is it to you for the United States to have the strongest economy in the world?



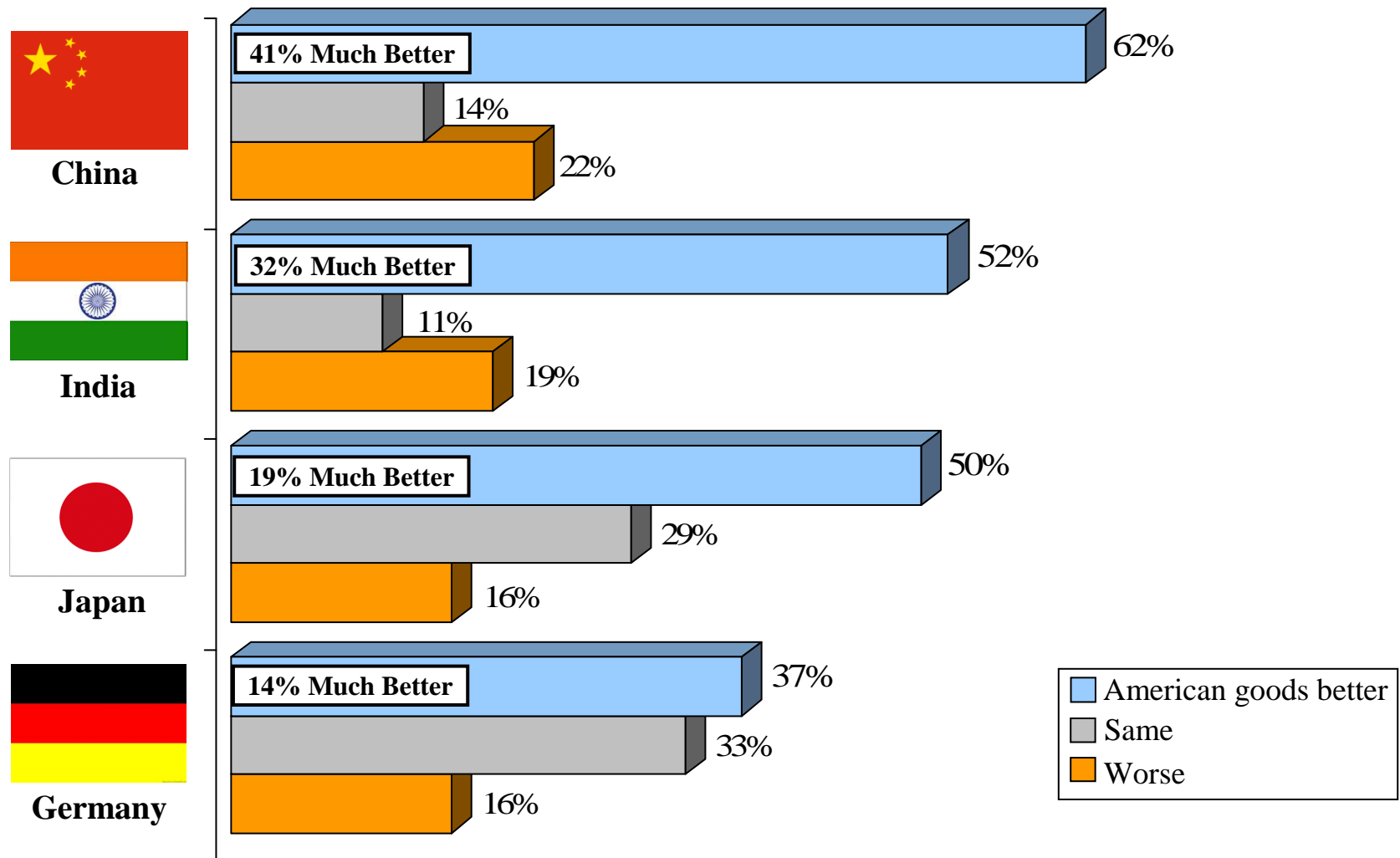


There Is A Strong Preference For American Goods And A Strong Distaste For Goods Manufactured In China



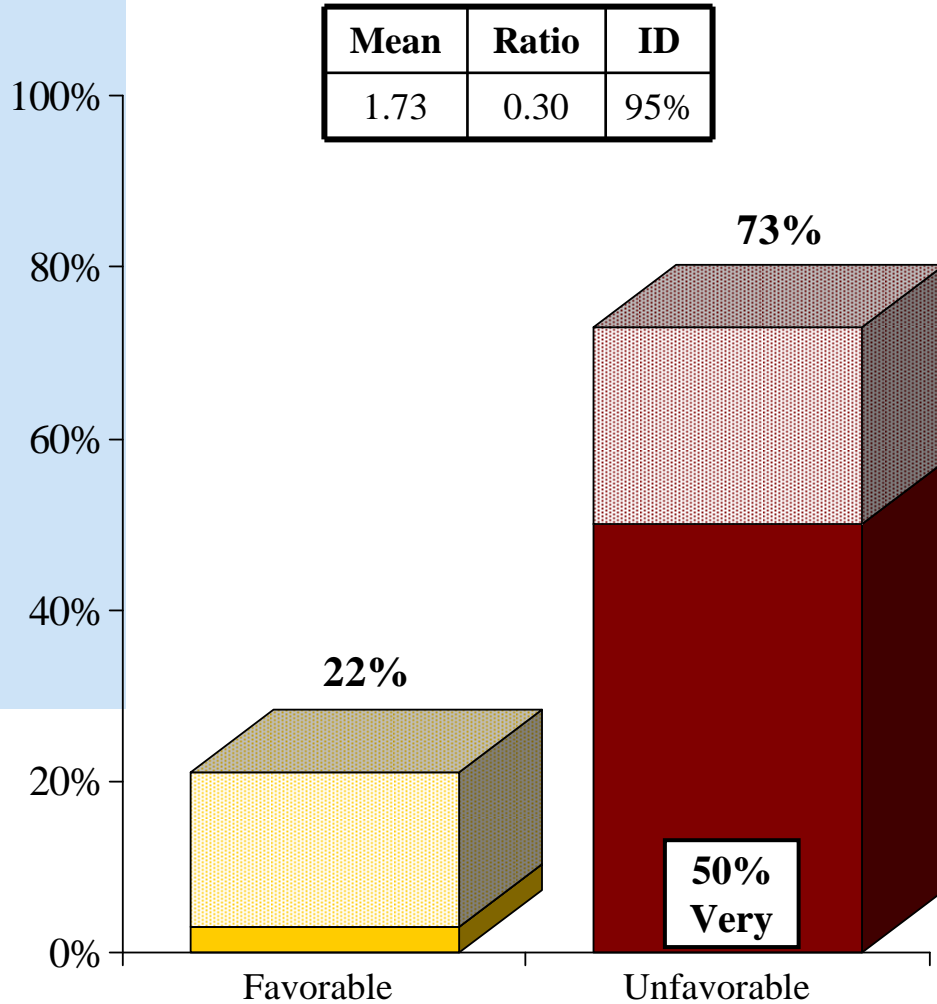
Majorities See American Goods As Superior To Those From China, India And Japan, With Greater Division On German Products

...For each [country] tell me how the quality of American manufactured goods compares to theirs.

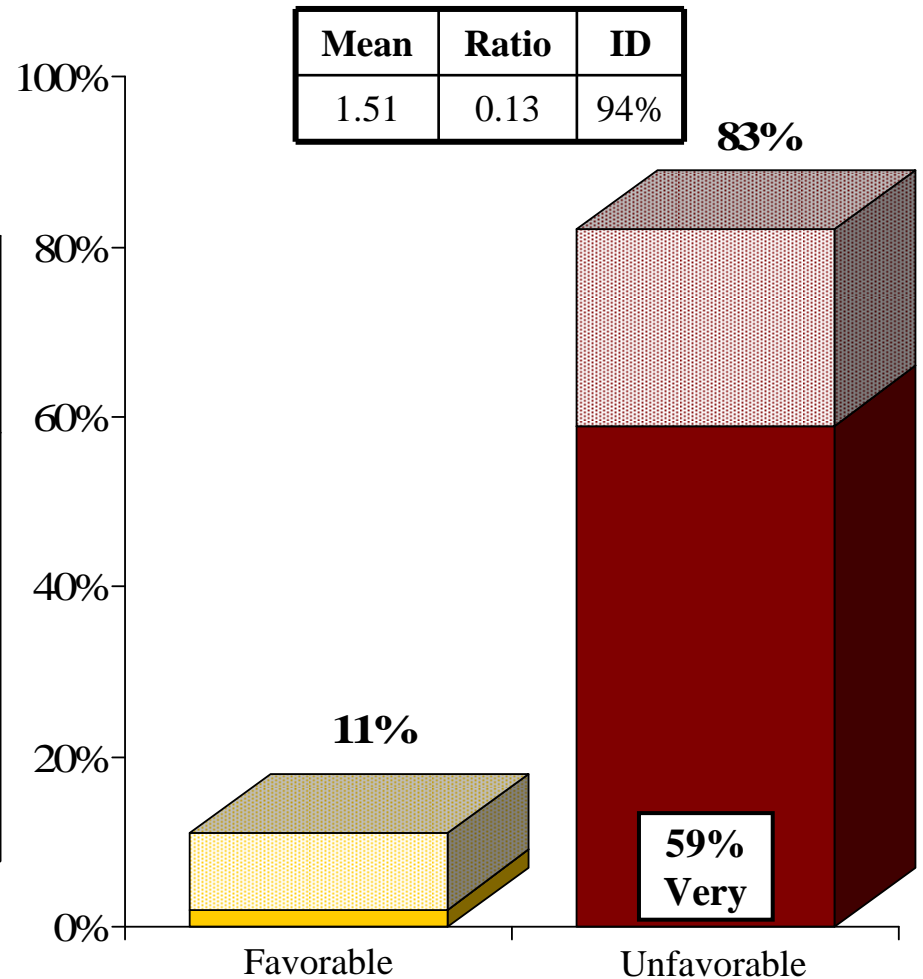


Goods Manufactured In China And Companies That Move There Are Extremely Unpopular

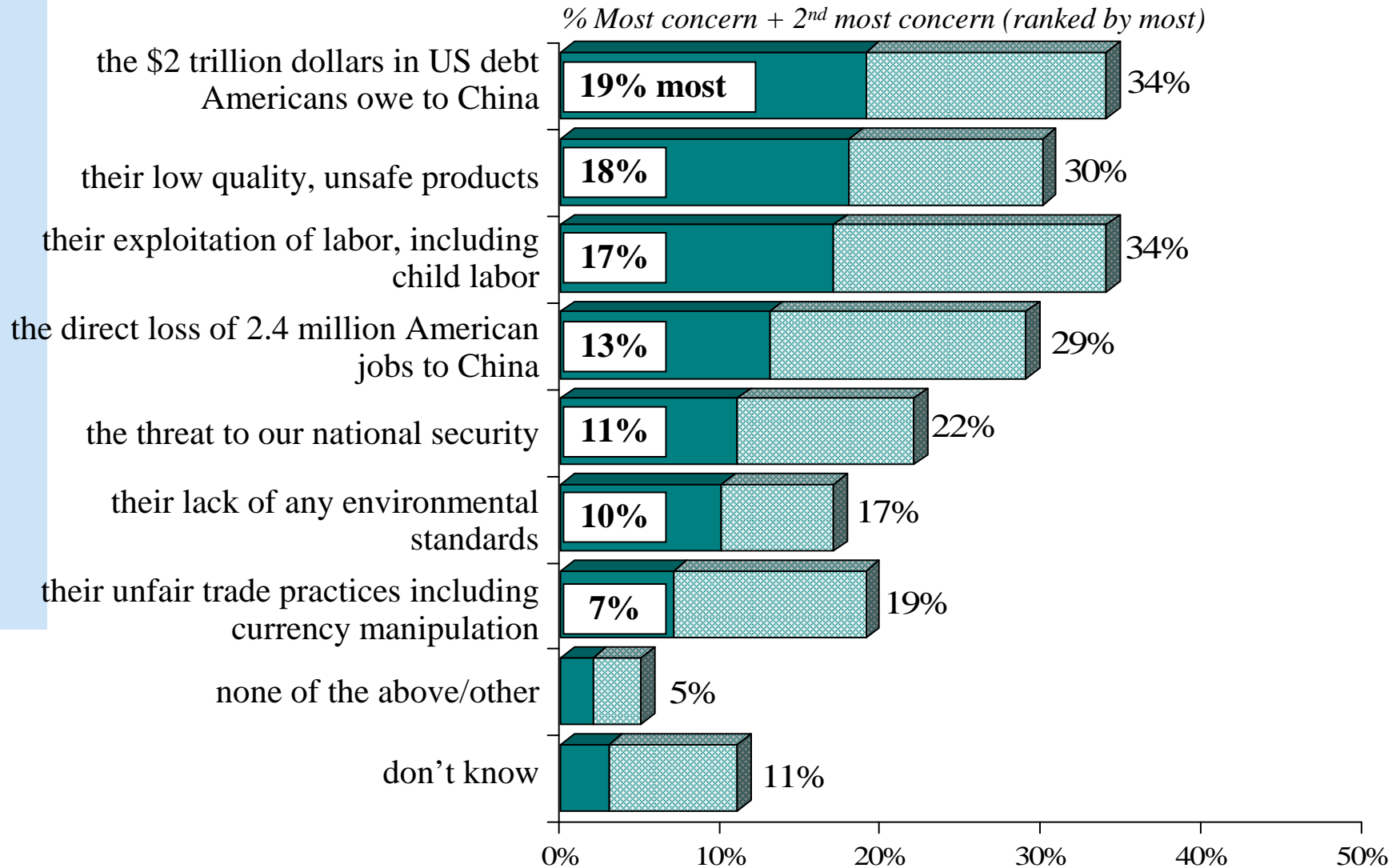
Manufactured Goods Made in China



Companies that go to China to manufacture



Voters' Greatest Concerns About China Focus On Debt, Product Safety And Exploitation

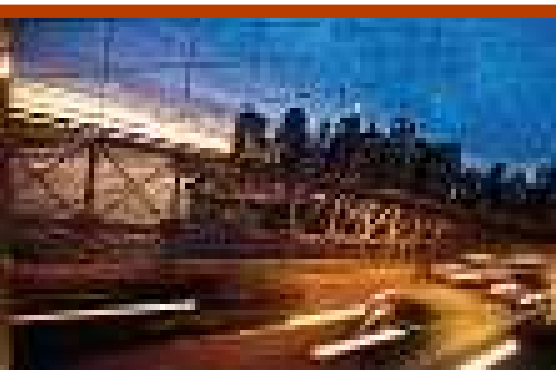




Majorities Favor Increased Support For Manufacturing



E Pluribus Unum
Out of many, one



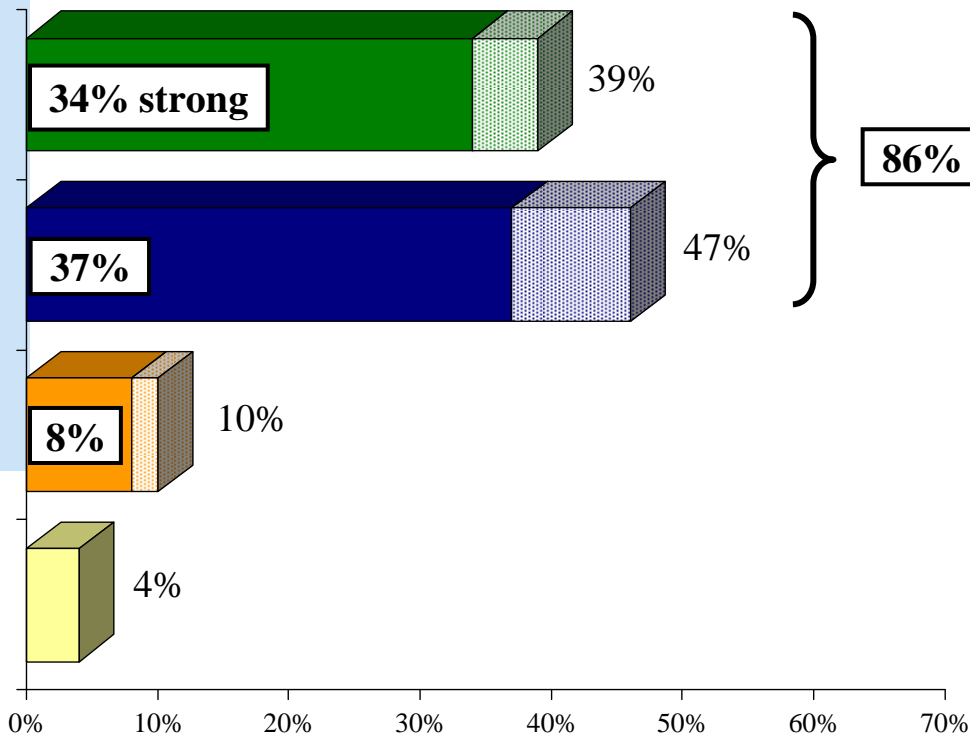
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Nearly All Want Action To Revitalize Manufacturing, With Voters Split On The Role Of Government

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.



	All in	Limited	Nothing
Democrat ID	49%	37%	8%
Independent ID	35%	50%	12%
Republican	33%	53%	12%
Tea Party Supporters	27%	57%	12%
Tea Party Opponents	49%	40%	10%
Union HH	41%	48%	10%
Non-Union HH	39%	46%	11%
Young women	41%	41%	14%
Young men	25%	60%	10%
Older women	45%	40%	12%
Older men	45%	47%	5%
Upper class	28%	51%	14%
College middle class	31%	52%	15%
Non-college middle	39%	45%	12%
Lower class	49%	42%	6%
Northeast region	48%	41%	7%
Midwest region	45%	47%	7%
South region	40%	45%	12%
West region	26%	54%	16%

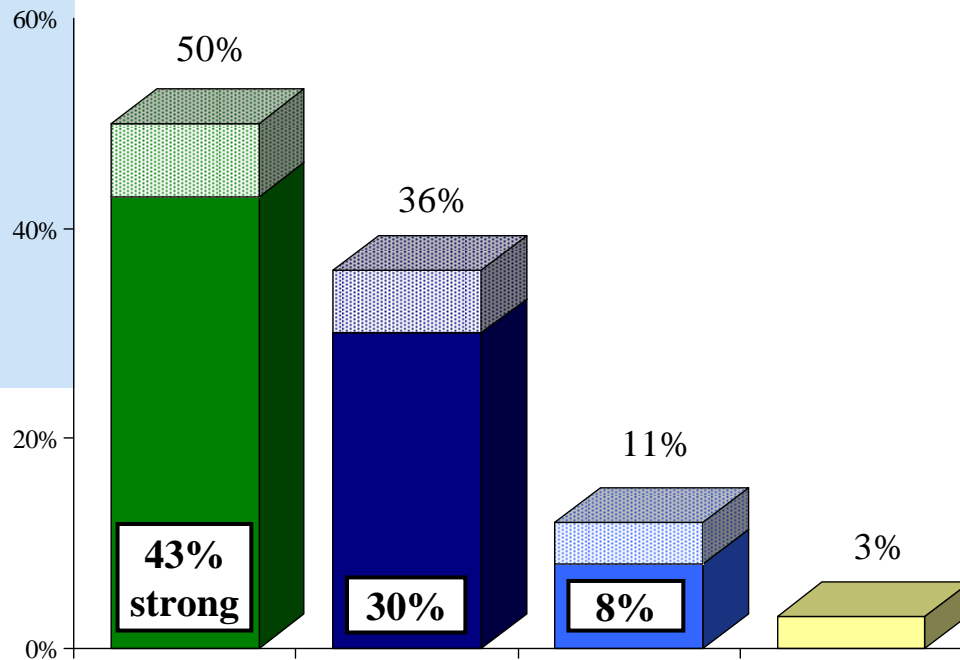
(darker shading=stronger intensity)



A Majority Believe We Can Compete Under Fair Trade, While Another Third Say We Are At A Disadvantage, But Still Believe We Should Do Everything Possible To Keep U.S. Manufacturing Strong

Which comes closer to your point of view:

- America can compete with manufacturers in any country as long as we can stop unfair trade practices, illegal subsidies and enforce environmental and labor standards
- American manufacturing will never be on completely even footing with foreign manufacturers but we still have to do whatever it takes to keep manufacturing in the US as strong as possible.
- We have to realize that no matter what we do, America will never be able to compete with manufacturers in some low wage third world countries – and live with it.



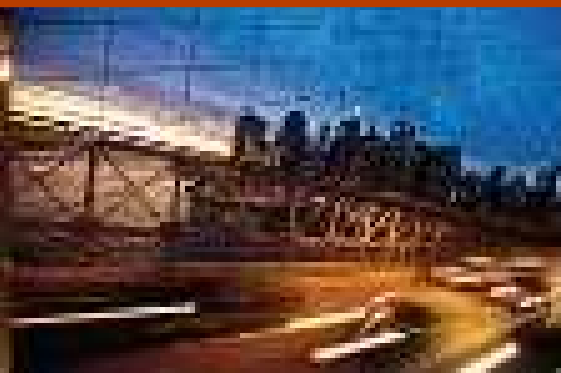
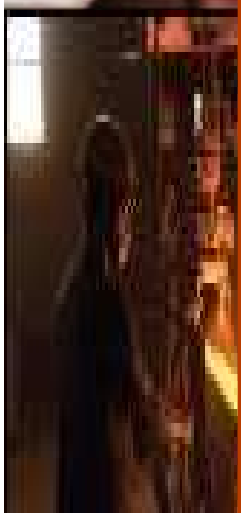
(darker shading=stronger intensity)

Democrat ID	48%	38%	11%
Independent ID	51%	33%	12%
Republican ID	51%	37%	11%
Tea Party Supporters	52%	40%	7%
Tea Party Opponents	49%	34%	15%
Manufacturing HH	55%	30%	12%
Non-Manufacturing HH	48%	38%	11%
Young women	41%	42%	15%
Young men	53%	30%	14%
Older women	51%	35%	12%
Older men	52%	41%	6%
Upper class	50%	35%	12%
College middle class	50%	36%	10%
Non-college middle	52%	34%	13%
Lower class	47%	39%	12%
Northeast region	42%	42%	14%
Midwest region	50%	38%	9%
South region	53%	32%	12%
West region	50%	36%	12%





Americans Support A National Manufacturing Strategy



E Pluribus Unum
Out of many, one

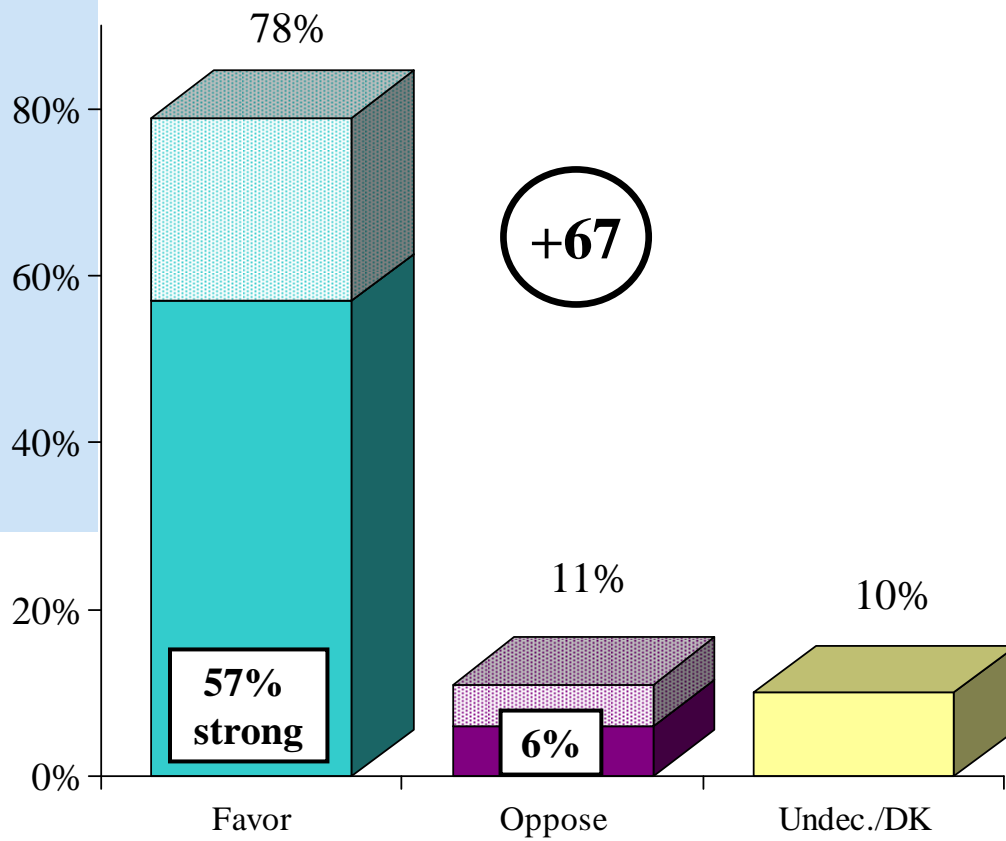


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Support For A National Manufacturing Strategy Is Overwhelming

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?



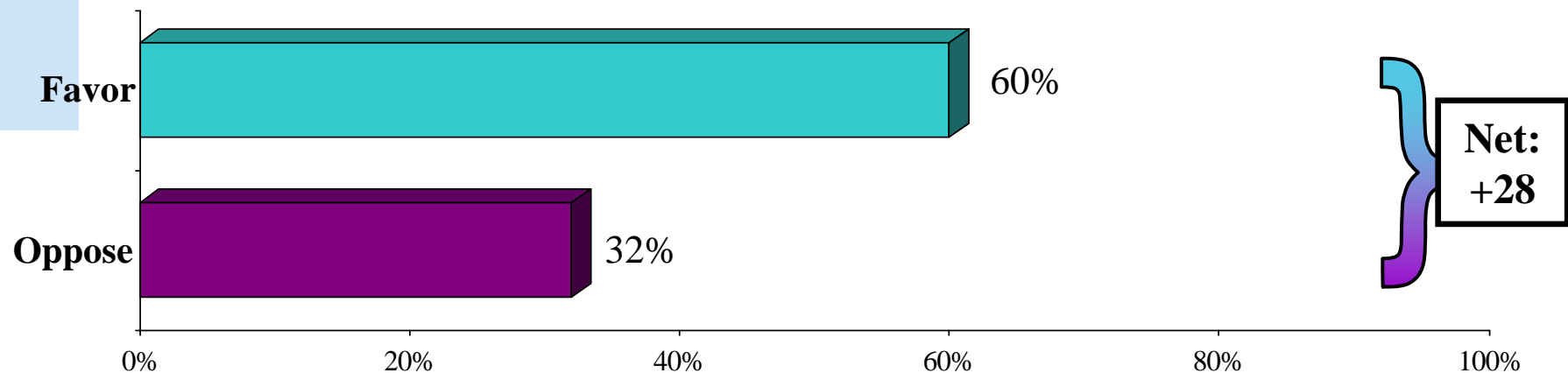
	Favor	Oppose
Democrat ID	83%	6%
Independent ID	78%	13%
Republican ID	74%	16%
Tea Party Supporters	74%	15%
Tea Party Opponents	81%	10%
Union HH	82%	10%
Non-Union HH	78%	12%
Manufacturing HH	86%	8%
Non-Manufacturing HH	77%	13%
Young women	79%	10%
Young men	81%	11%
Older women	74%	14%
Older men	80%	11%
Upper class	76%	14%
College middle class	77%	11%
Non-college middle class	82%	11%
Lower class	79%	11%
Northeast region	81%	11%
Midwest region	76%	12%
South region	82%	11%
West region	73%	13%



Voters Overwhelmingly Agree With Supporters Over Opponents

Opponents say that this country is strongest when we allow the free market and private enterprise to drive growth instead of government. We bailed out the auto industry so that union workers and auto companies could do well, and all we got was higher taxes, higher priced cars, and the federal government owning car companies and picking their CEOs. Government should not be picking winners and losers. Economies evolve over time, and our economy does best when we get government out of the way and let American ingenuity create good new jobs. The American economy of tomorrow may have more high tech jobs and fewer manufacturing jobs, but we will still have the strongest economy in the world that can compete with anyone.

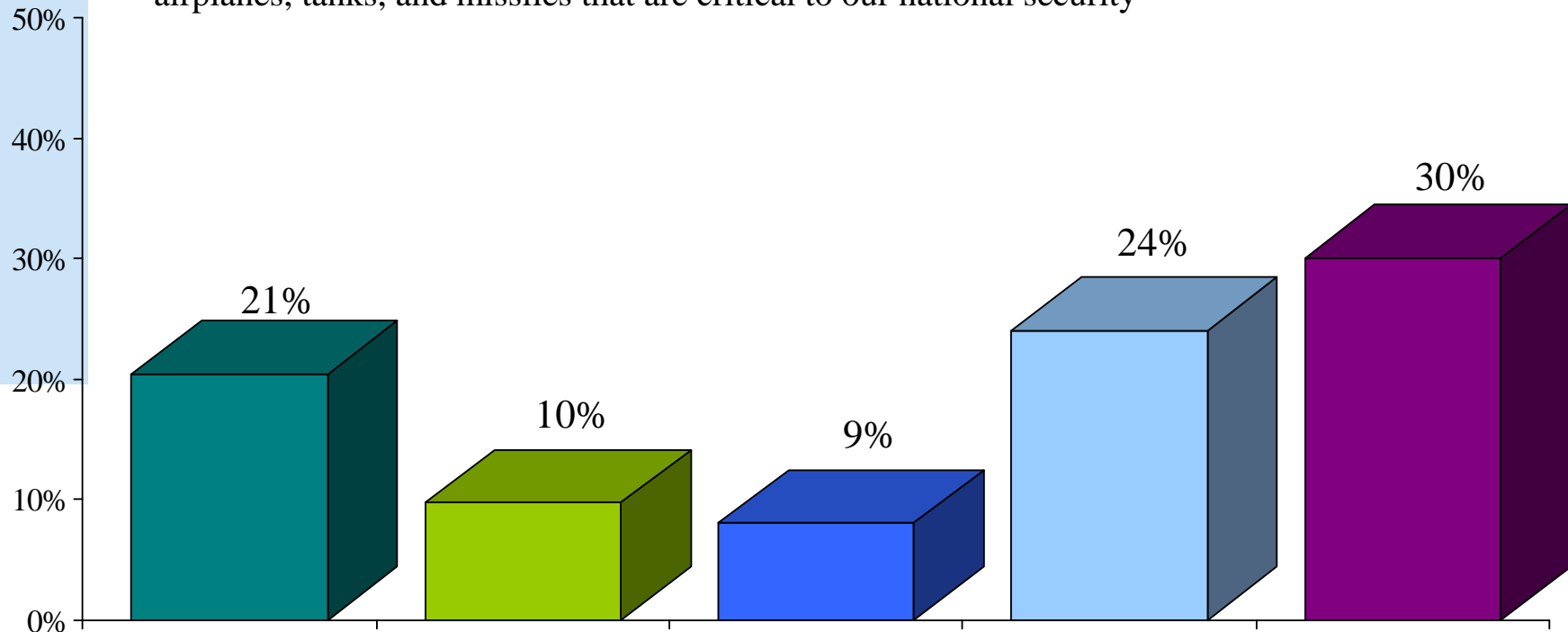
Supporters say that we need to act before our national manufacturing base is completely undermined, further weakening our already faltering national economic strength. We have lost over 50,000 manufacturing facilities and over 5 million manufacturing jobs in the last 10 years. Meanwhile, countries like China and Germany are taking over as the world leaders in manufacturing – in part because their government has taken aggressive action to support them. Our government already gets involved in trade, tax and business issues – but unlike our competitors we have not made manufacturing a priority. This strategy is not about doing anything new – it’s about doing things smarter, and fully enforcing trade agreements already in place. Let’s put our ingenuity, innovation and government policy to work for us.



Dependence On Foreign Countries For Manufactured Goods Is Judged The Most Important Reason For A Manufacturing Strategy

Which one of the following is the most important reason to have a national manufacturing strategy:

- To protect a critical part of our national economy
- Because manufacturing jobs give workers better pay and benefits than other fields
- Almost every other country integrates tax, trade & other policies into a well thought-out strategy
- Foreign countries are using unfair trade practices and low wage workers to undermine our economy and the security of American workers
- We are becoming too dependent on foreign countries for manufactured goods, including parts for airplanes, tanks, and missiles that are critical to our national security

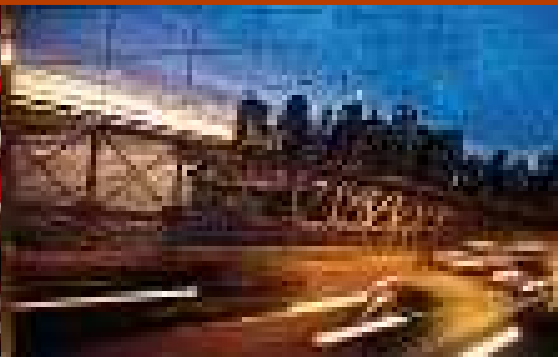




Voters' Economic Solutions Center On Trade, Clean Energy, Tax Credits For Manufacturing And Replacing Aging Infrastructure Using U.S. Materials



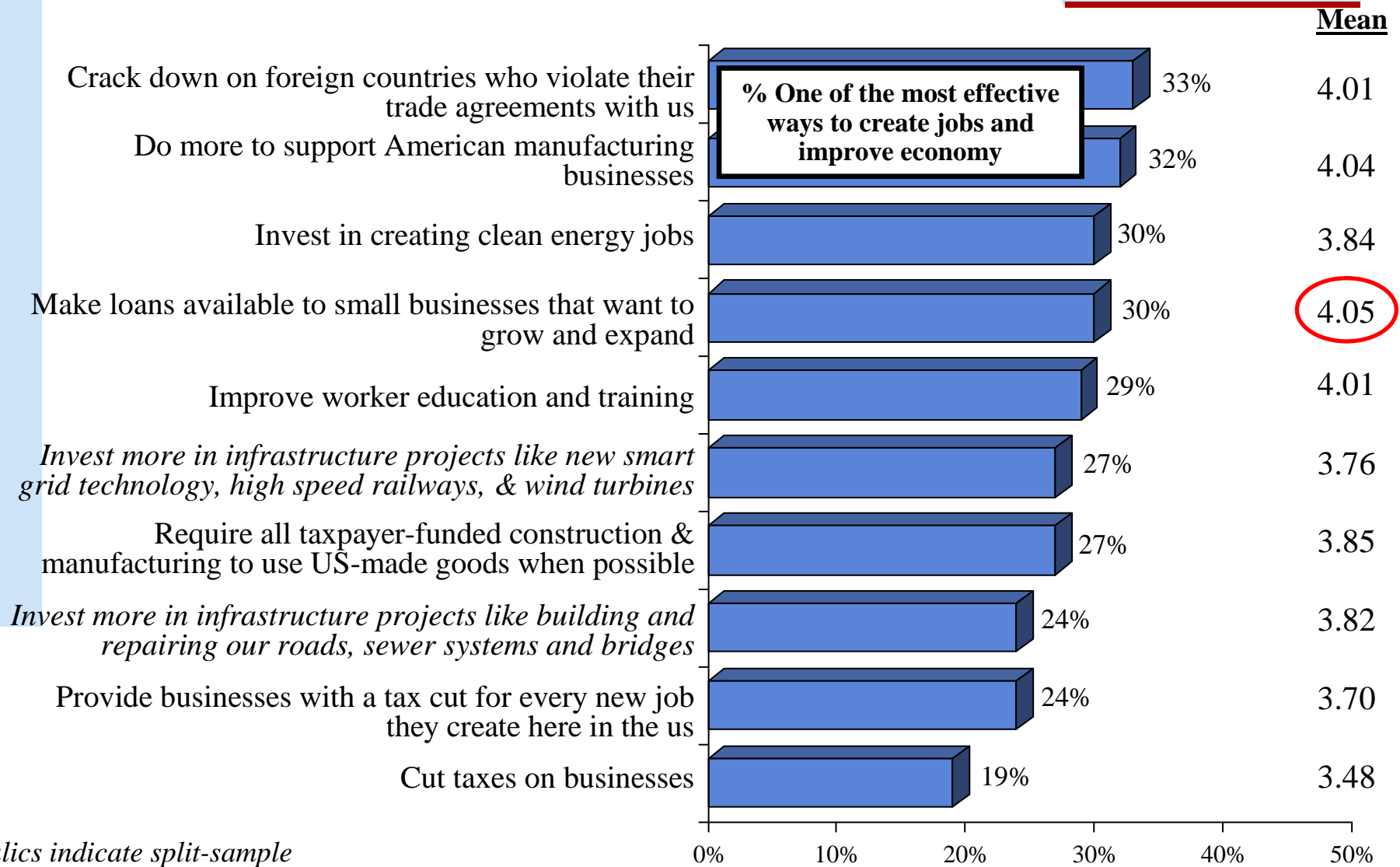
E Pluribus Unum
Cut of many, one



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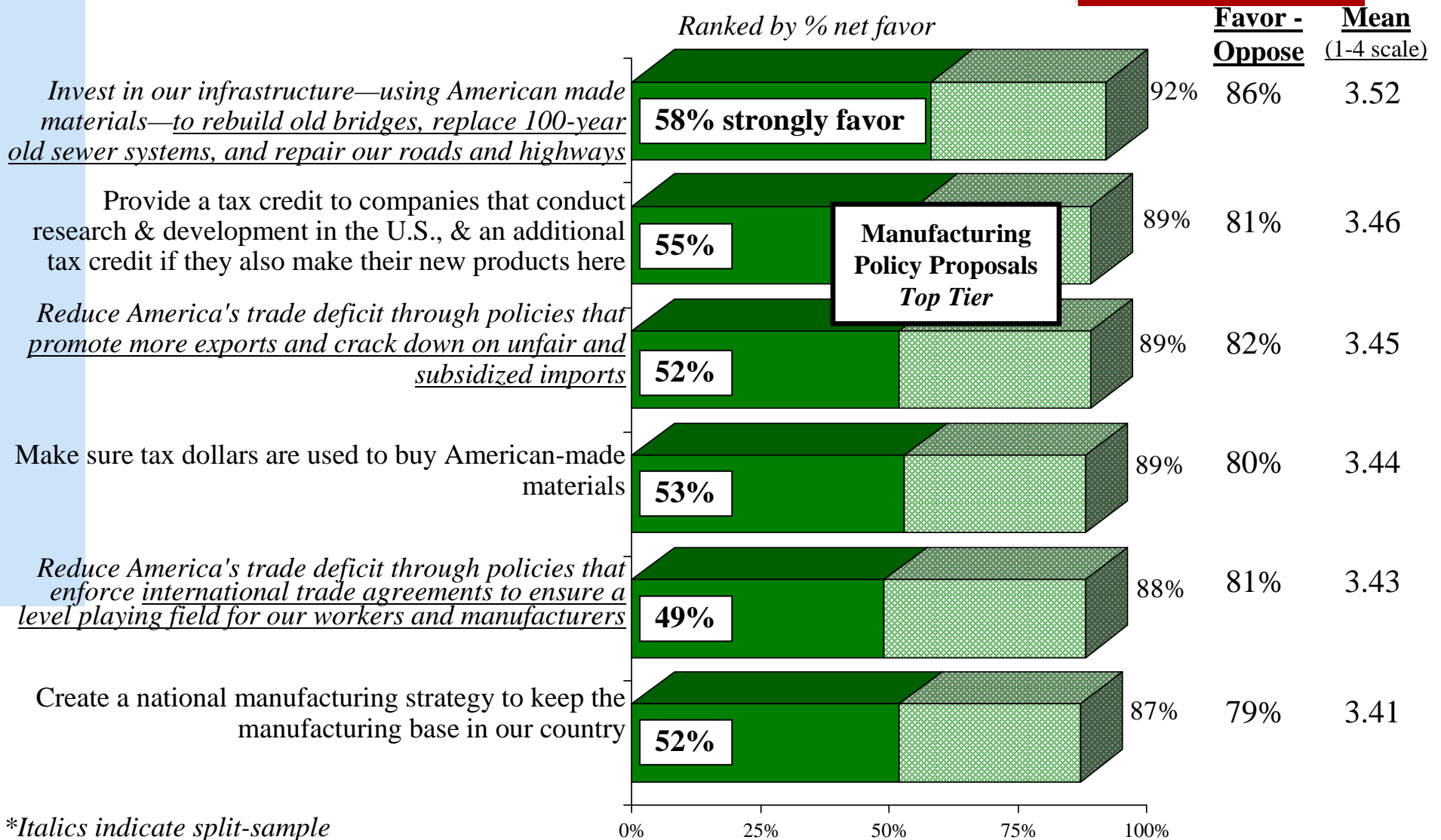
The Most Effective Ways To Improve The Economy And Create Jobs Are Cracking Down On Unfair Trade And Doing More For Manufacturing



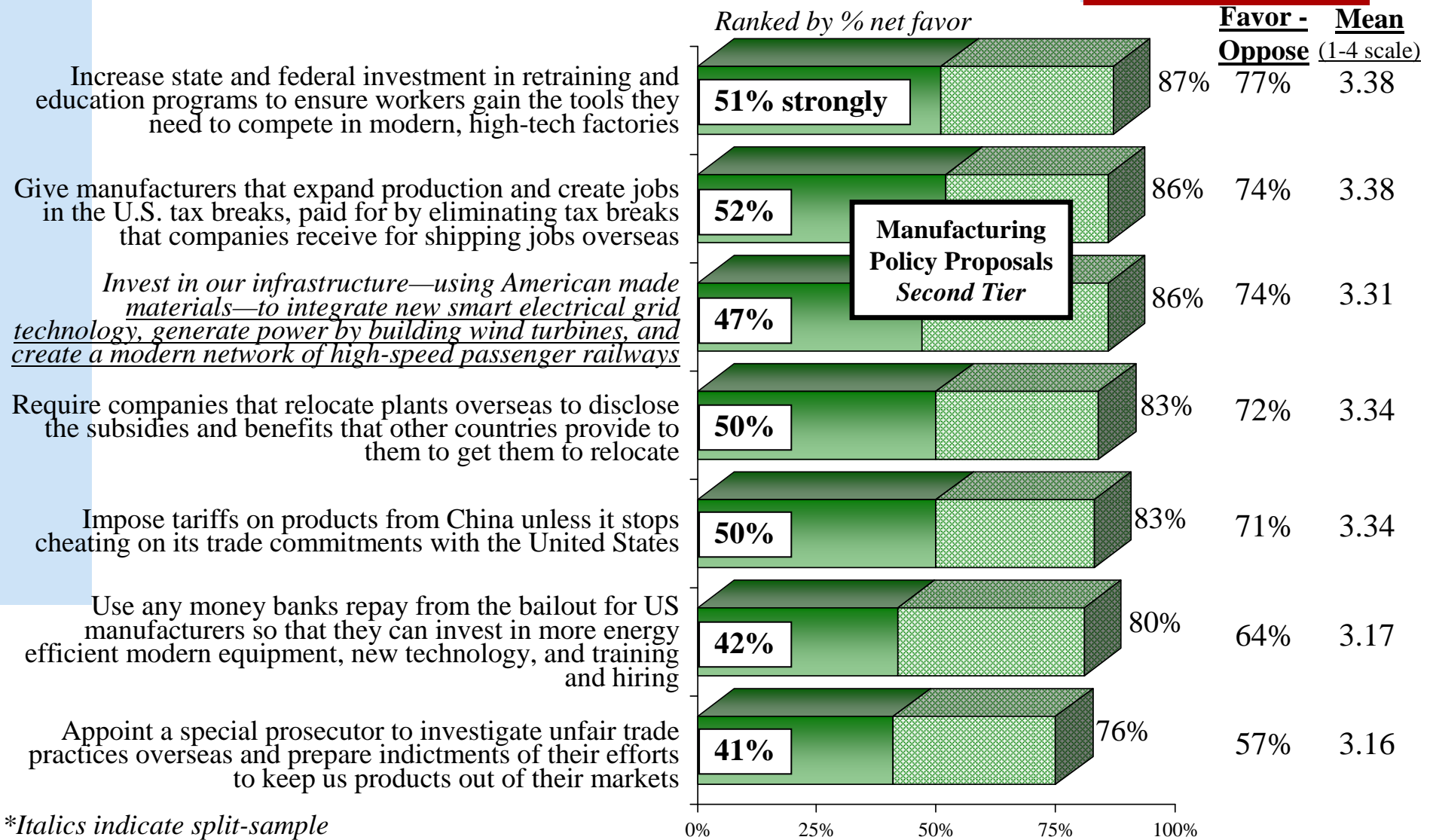
*Italics indicate split-sample



Replacing Aging Infrastructure Using U.S. Materials Is The Most Popular Proposal, Followed By R&D Tax Credits, Doing More On Exports And Unfair Trade And Buy American



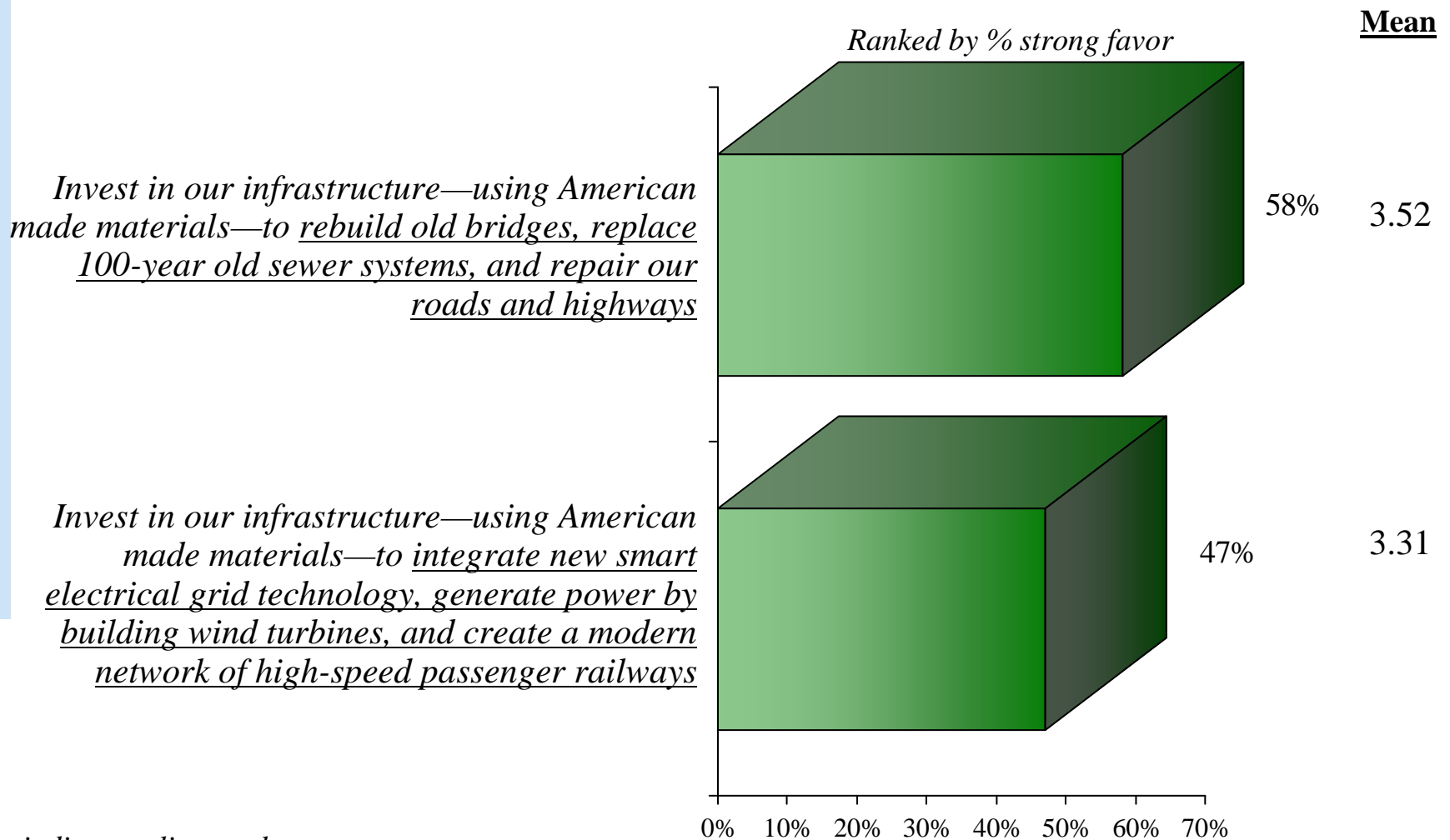
Investing In New Kinds Of Infrastructure Is Among Our Less Popular Proposals, Along With Using Repaid Bail Out Money, And Appointing A Special Prosecutor On Trade



*Italics indicate split-sample



Investing In New Infrastructure Is Significantly Less Appealing Than Replacing Old

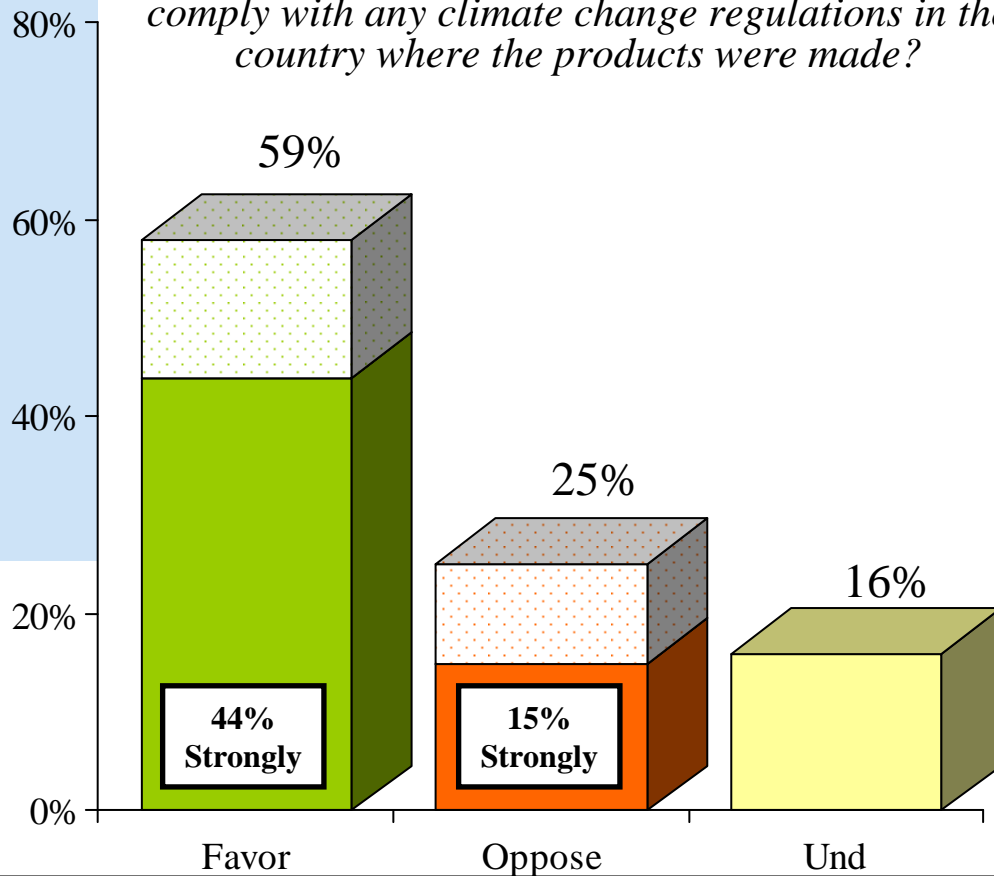


**Italics indicate split-sample*



A Majority Favors A Tariff On Products From Countries With Low Environmental Standards

If American manufactured goods were made more expensive as a result of new climate change legislation, would you then favor or oppose a tariff on products imported from other countries that are cheaper because they came from a country that does not have to comply with any climate change regulations in the country where the products were made?



	Favor	Oppose
Democrat ID	61%	22%
Independent ID	59%	26%
GOP ID	56%	28%
Tea Party Supporters	56%	30%
Tea Party Opponents	65%	24%
Manufacturing HH	54%	31%
Non-Manufacturing HH	60%	24%
Young women	53%	25%
Young men	64%	24%
Older women	59%	23%
Older men	62%	29%
Upper class	69%	23%
College middle class	60%	26%
Non-college middle	61%	23%
Lower class	53%	27%
Northeast region	59%	23%
Midwest region	60%	23%
South region	57%	27%
West region	60%	26%



Strategic Conclusions

- Americans see manufacturing as a key determinant of our economic strength and security—politicians who don't are wildly out of sync with their constituents
- Voters believe manufacturing is irreplaceable—no sector can substitute
- Creating manufacturing jobs and strengthening US manufacturing are top issues voters would like to see Congress and The President address
- Americans lament our loss of world economic leadership and want it back
- Voters see increased support for manufacturing as key to our economic revival
- Nearly all want tougher trade enforcement and incentives for manufacturing, but are wary of the government's role in direct assistance
- Job creation and avoiding dependence on other nations are key motivators
- China is the object of great worry and animosity
- Views on these issues cut across political and geographic divisions





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