

National Public Radio National Survey

November, 2003



Methodology

The reported results on public attitudes come from a national survey conducted by Public Opinion Strategies and Greenberg Quinlan Rosner Research for National Public Radio (NPR) November 11-13, 2003. The firms, together with NPR, developed questions to inform a news segment for Morning Edition. This is our eleventh survey in the NPR series. The dates of the earlier surveys were February 27-28, 2003, March 4-7, 2002, March 19-25, 2002, April 28-30, 2002, June 18-24, 2002, July 23-25, 2002, September 17-22, 2002, October 14-17, 2002, May 27-29, 2003, and Sept. 24-October 1, 2003.

With a view to the upcoming elections, the surveys were conducted with likely voters. All participants were registered voters, who voted or were ineligible to vote in the 2000 presidential election or voted in the 2002 Congressional elections and indicated they were “almost certain” or “certain” to vote in 2004. The sample of potential respondents was generated by random digit dial methodology. The sample size for this survey was 700 registered likely voters with a margin of error of ±3.70%.

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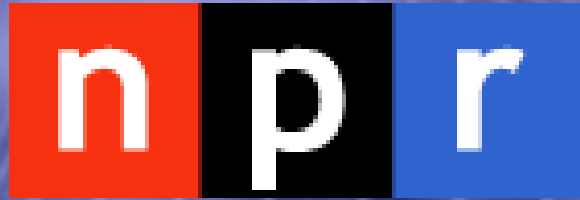
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Main Findings

1. The recent better economic news has contributed to a small improvement in the percentage of voters saying the country is headed in the “right direction.”
2. President Bush’s job approval rating continues to be in the 50’s. There is an unusually sharp difference in President Bush’s job approval by gender, with men approving the president’s job by a +28% margin (63% approve/35% disapprove), while only 48% of women say they approve with 49% saying they disapprove of the job he is doing.
3. President Bush’s job approval ratings are sharply divided by political party, with 74% of Republicans saying they “strongly approve,” while 52% of Democrats “strongly disapprove” of his performance in office. Among Independents, President Bush’s strong approval has dropped to 25% strongly approve/30% strongly disapprove rating.
4. There has been a shift in the national issue environment as concern about “the situation in Iraq” increases. While the number one issue continues to be “the economy and jobs” as 44% of voters say this issue would be one of their top two concerns in deciding how to vote for president, the percentage of people mentioning Iraq has moved from 14% in September to 28% today. “The situation in Iraq” has now moved to the second most important issue in deciding how people would vote for president.
5. While Gore voters, Democrats, and Liberals are now all more likely to say “the situation in Iraq” would impact their vote, this issue has also increased in salience among important swing voter groups such as people over 65 years old, Independents, and Moderates.

Main Findings

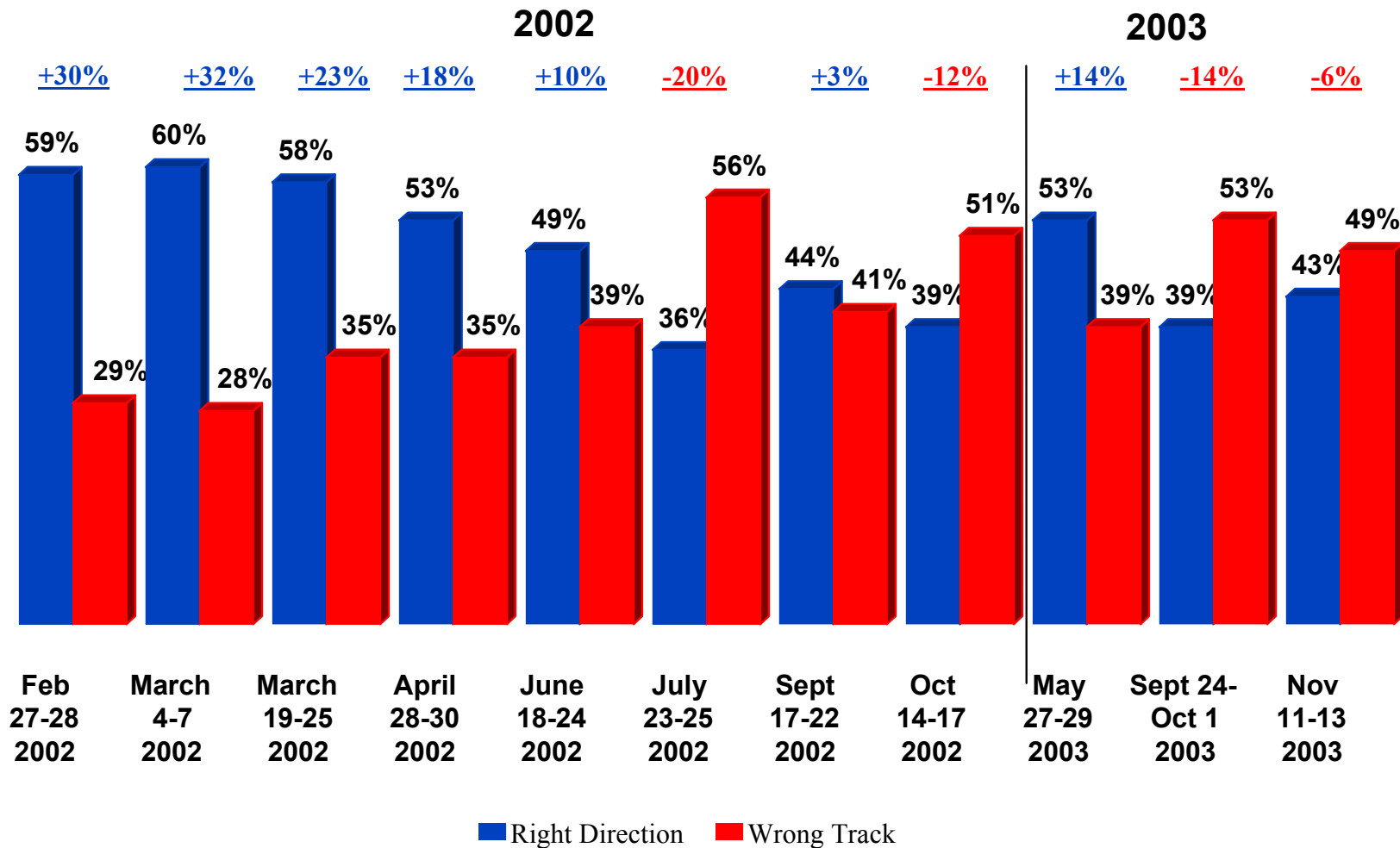
6. The generic presidential ballot continues to be within the margin of error. Since May, President Bush has maintained a wide lead in the states he carried by five percent or more, while slipping in the states he lost by five percent or more in 2000. Among the 34% of voters living in states that either Bush or Gore won by four percentage of less in 2000, the generic vote has shifted from Bush 52% to 33% for the Democratic candidate in May to Bush 42% to 42% Democratic candidate today. Further, while Bush now loses by a wide margin among voters focused on Iraq (28% Bush/57% Democratic candidate), he maintains a wide lead among those voters focused on “terrorism and national security” (71% Bush/16% Democratic candidate).
7. A majority of voters say the economy is growing. While 41% of voters say the Bush tax cut has had “not much impact” on the economy, a small plurality of Americans believe President Bush’s tax cuts have helped the economy (33% total helped/21% total hurt). Voters are sharply divided about the unemployment rate with roughly a third saying things are improving and the unemployment rate is dropping, a third saying the unemployment rate is actually going up, and another third saying this rate is “not changing very much.” Perceptions of the economy vary widely based on a voters’ gender, ethnicity, political party, and income.
8. Voters very clearly tell us they believe the most important measures of whether the economy is improving are all connected to jobs. While one out of four voters report there’s been no positive signs of improvement in today’s economy, 29% say “the stock market is going up” and another 21% say “the unemployment rate is going down.”
9. We tested two hypothetical statements about the economy. We tested a sample statement that might be made by President Bush and a statement that might be made by a Democratic nominee for president. Overall, voters found the Democratic critique more convincing. Between the two statements tested, a majority of voters selected the Democratic statement as the one which best describes what they think.
10. Voters are paying attention to the stock market and economic news. Twenty-seven percent (27%) of voters could correctly identify the current Dow Jones Industrial Average (DJIA). This matches the highest percentage of correct responses to this question. People who own investments or who can correctly identify the DJIA are more positive among the economy, more positive about the direction of the country, provide President Bush higher job ratings, and are more likely to say they would vote for President Bush over a Democratic candidate for president.



Key National Political Data



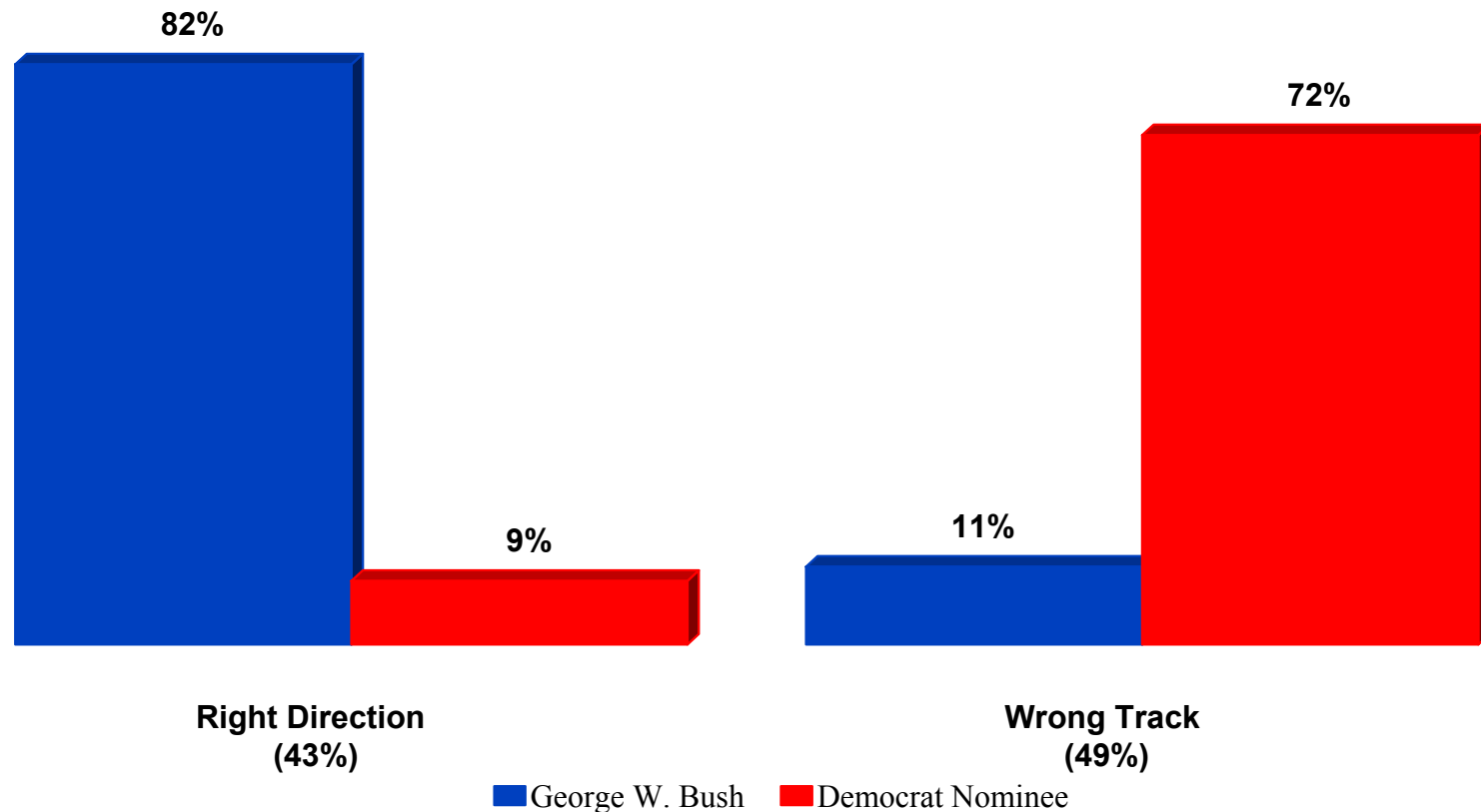
The recent better economic news has contributed to a small up tick in “right direction.”



Generally speaking, would you say that things in the country are going in the right direction, or have they seriously gotten off on the wrong track?

As always, the generic presidential ballot by right direction/wrong track reminds us why this basic barometer question is so important.

Presidential Ballot by Right Direction/Wrong Track

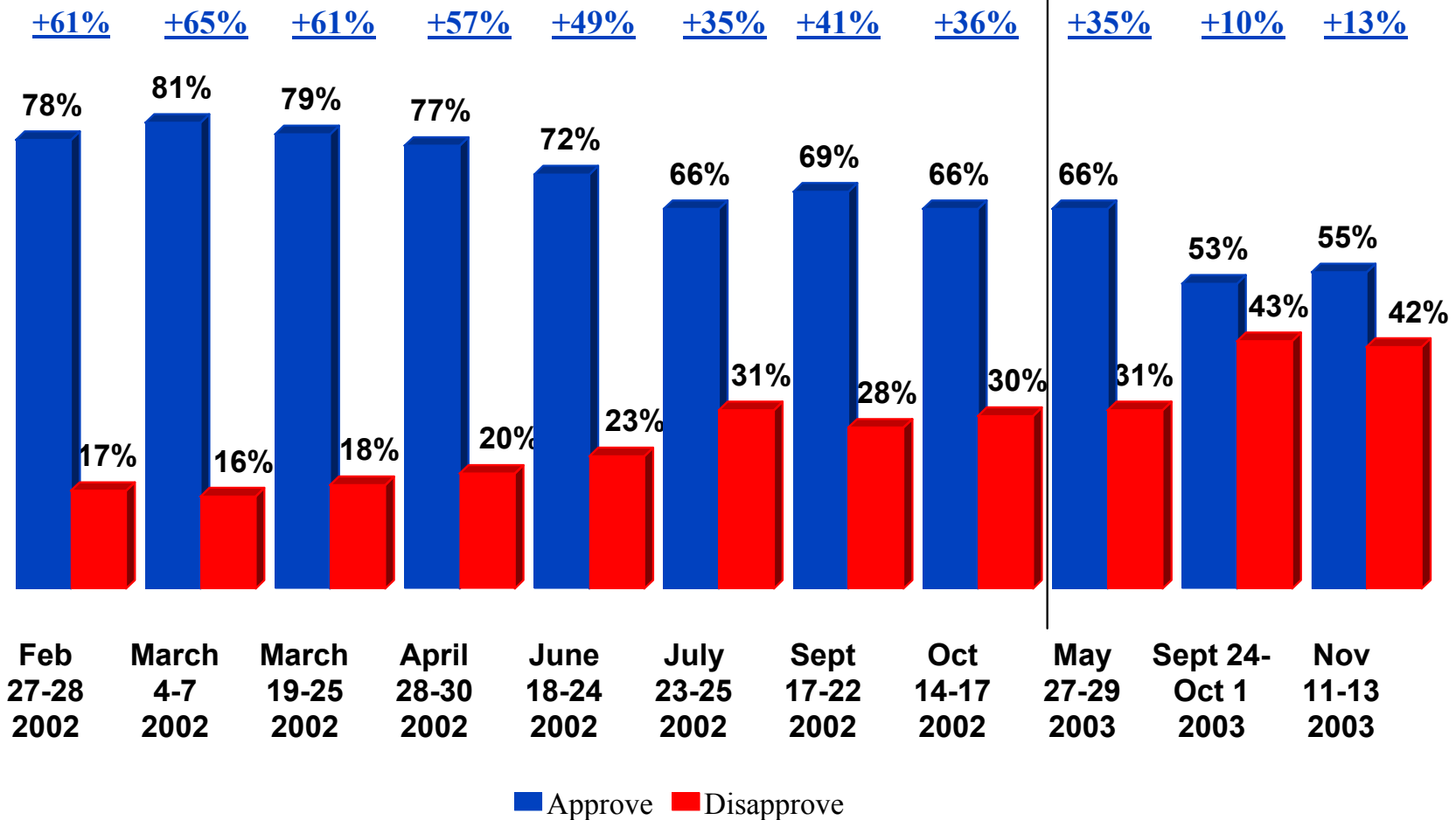


Now, I know it is a long way off, but thinking about the elections in 2004, if the election for president were held today and the candidates were Republican George W. Bush and the Democratic nominee for President — for whom would you vote, Republican George W. Bush or the Democratic nominee for President?

President Bush continues to maintain a job approval rating in the 50's.

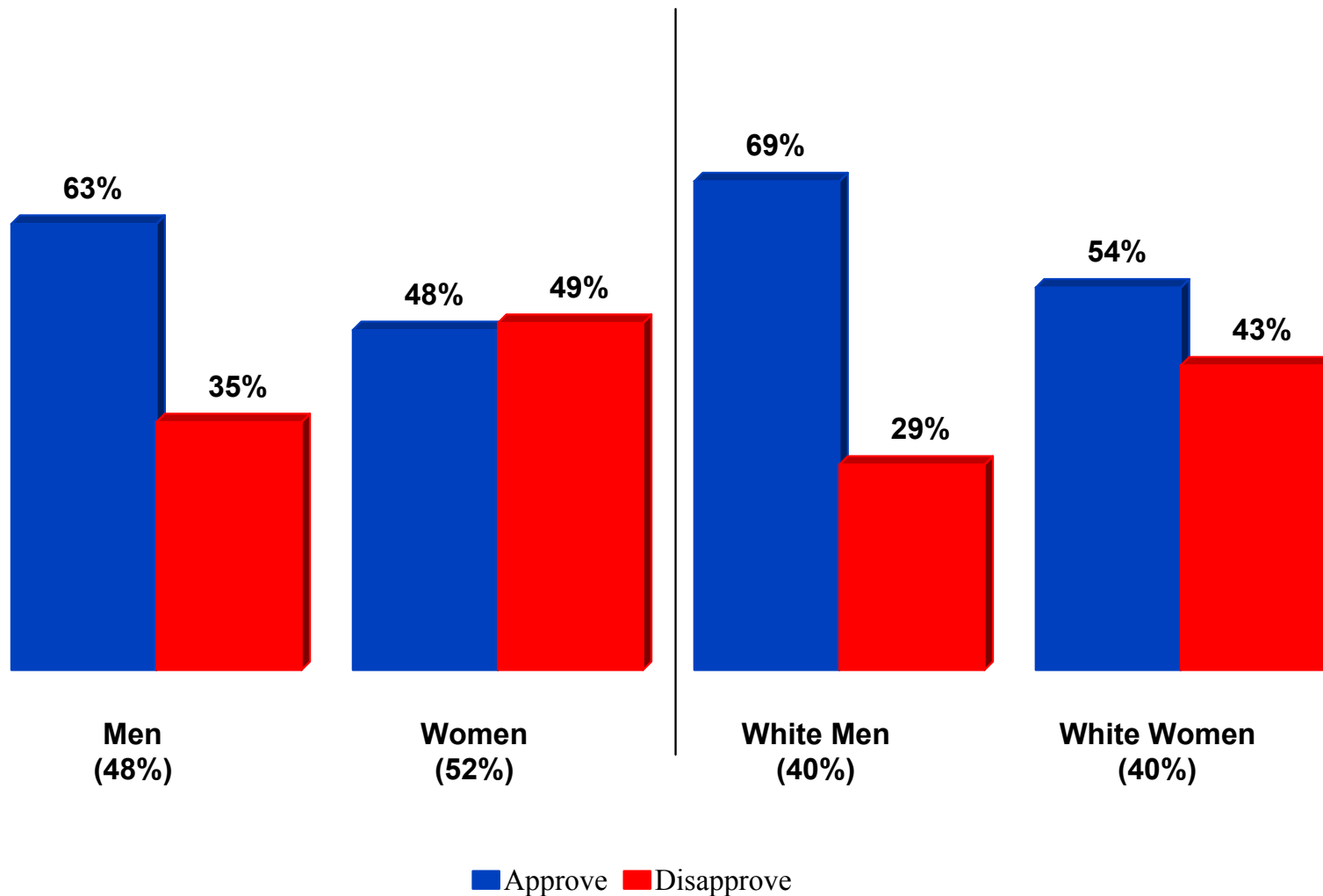
2002

2003



And, do you approve or disapprove of the job George W. Bush is doing as President?

There is an unusually sharp difference in President Bush's job approval rating by gender.

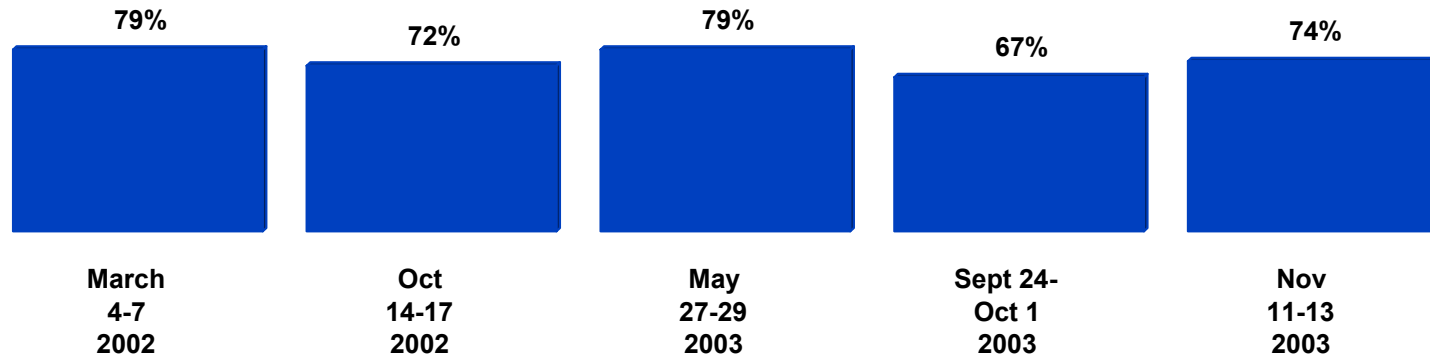


And, do you approve or disapprove of the job George W. Bush is doing as President?

There is an unusually sharp difference by political party when looking at *strong* approve and *strong* disapprove numbers.

Presidential Job Approval by Republican

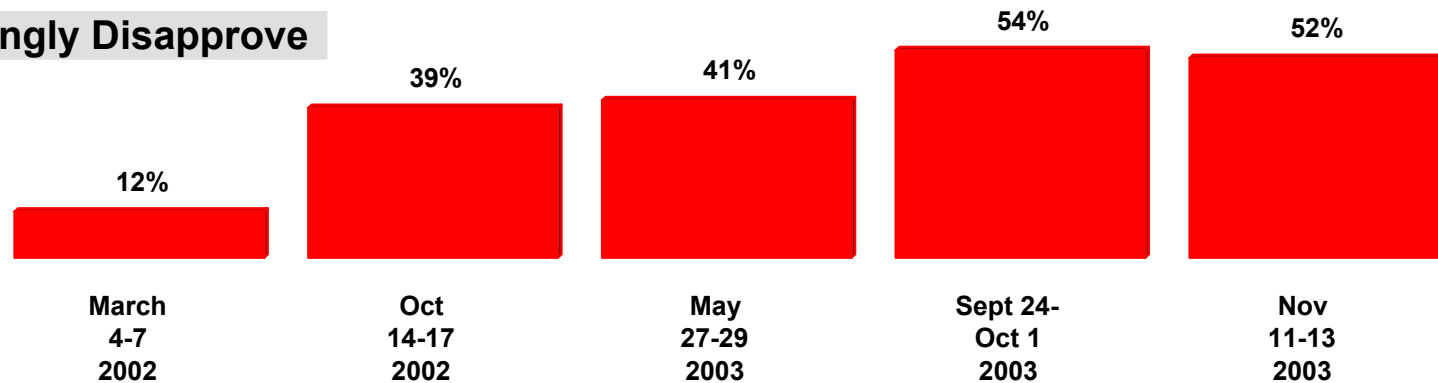
Strongly Approve



■ GOP Strongly Approve

Presidential Job Approval by Democrat

Strongly Disapprove

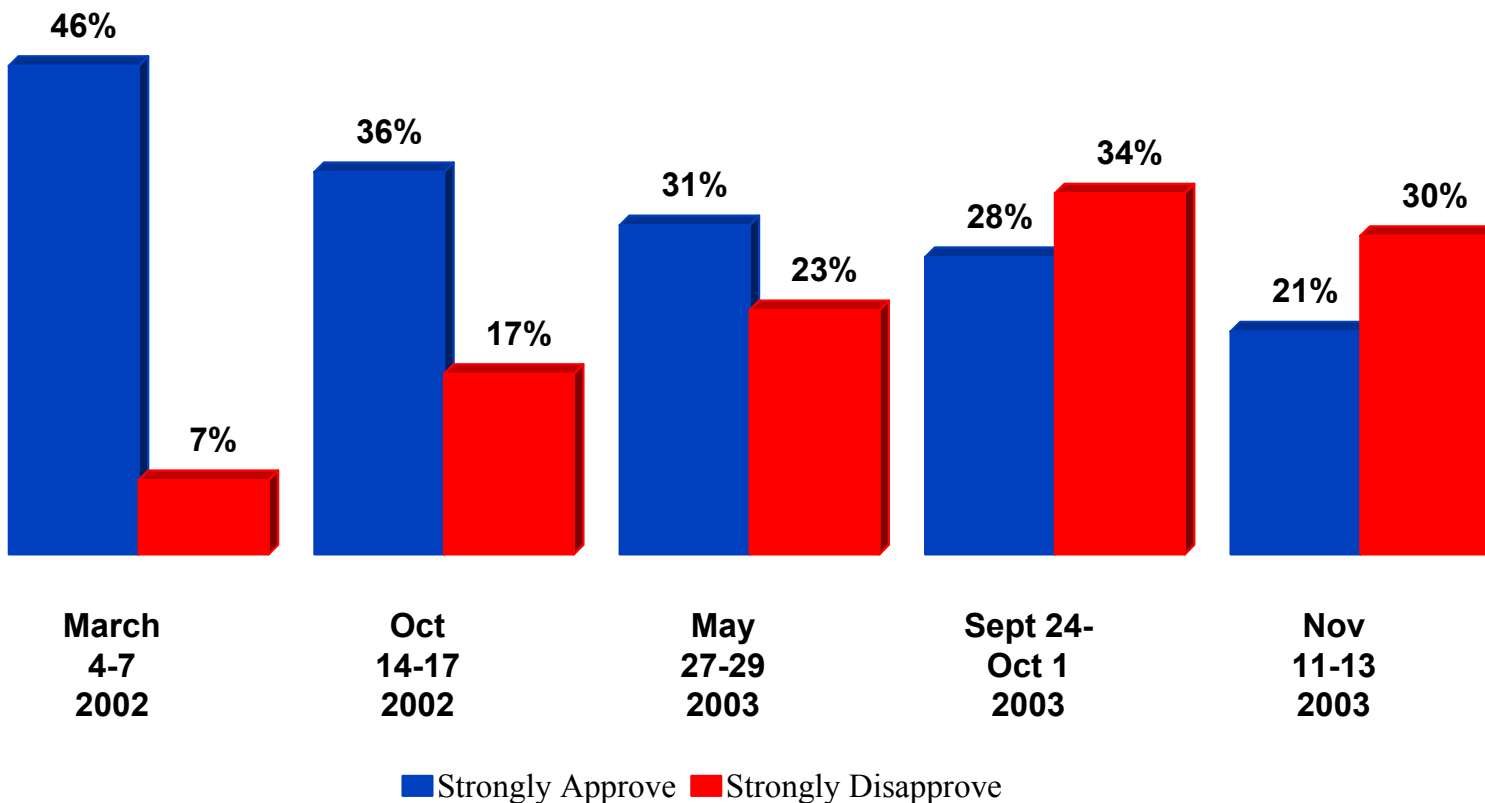


■ DEM Strongly Disapprove

And, do you approve or disapprove of the job George W. Bush is doing as President?

While President Bush has a 51% overall job approval number among Independents, he has slipped to a net negative rating among Independents who have a “strong” opinion.

Presidential Job Approval by Independent
Strongly Approve/Strongly Disapprove



And, do you approve or disapprove of the job George W. Bush is doing as President?

There has been a shift in the national issue environment as concern about “the situation in Iraq” increases.

	May 2003	Sept 2003	Nov 2003	D/S (Sept-Nov)
Economy and Jobs	46%	51%	44%	-7%
Situation in Iraq	-	14%	28%	+14%
Terrorism/National Security	26%	28%	24%	-4%
Affordable Health Care	21%	22%	23%	+1%
Social Security/Medicare	22%	19%	19%	-
Moral Values	17%	17%	17%	-
Education	21%	21%	16%	-5%
Taxes	10%	9%	9%	-
Federal Deficit	-	8%	5%	-3%

*And, which ONE of the following issue areas would be MOST important to you in deciding how to vote for a candidate for President?
And which of the following would be the NEXT issue most personally important to you?*

There are a lot of sub-groups in common whose concerns about “the economy and jobs” dropped and whose concern about “the situation in Iraq” increased.

Economy and Jobs

	<u>Sept 2003</u>	<u>Nov 2003</u>	<u>D/S</u>
Silent Generation (age 61-78)	46%	28%	-18%
African American	59%	43%	-16%
Liberal	59%	44%	-15%
Age 65+	43%	29%	-14%
GI Generation (age 79-102)	41%	29%	-12%
Union Household	58%	47%	-11%
Midwest Region	51%	41%	-10%
Some College	49%	39%	-10%
Working Women	53%	43%	-10%
Women at home	38%	28%	-10%
Gore 2000 Voters	61%	51%	-10%
Independent	52%	43%	-9%
Women	46%	38%	-8%
White Men	55%	47%	-8%
Democrats	56%	48%	-8%
White	50%	43%	-7%
College Grad	56%	49%	-7%
Men	56%	50%	-6%
White Women	45%	39%	-6%
Northeast Region	53%	47%	-6%
South Region	48%	42%	-6%
West Region	53%	47%	-6%
Republicans	45%	39%	-6%

Sub-groups
in common

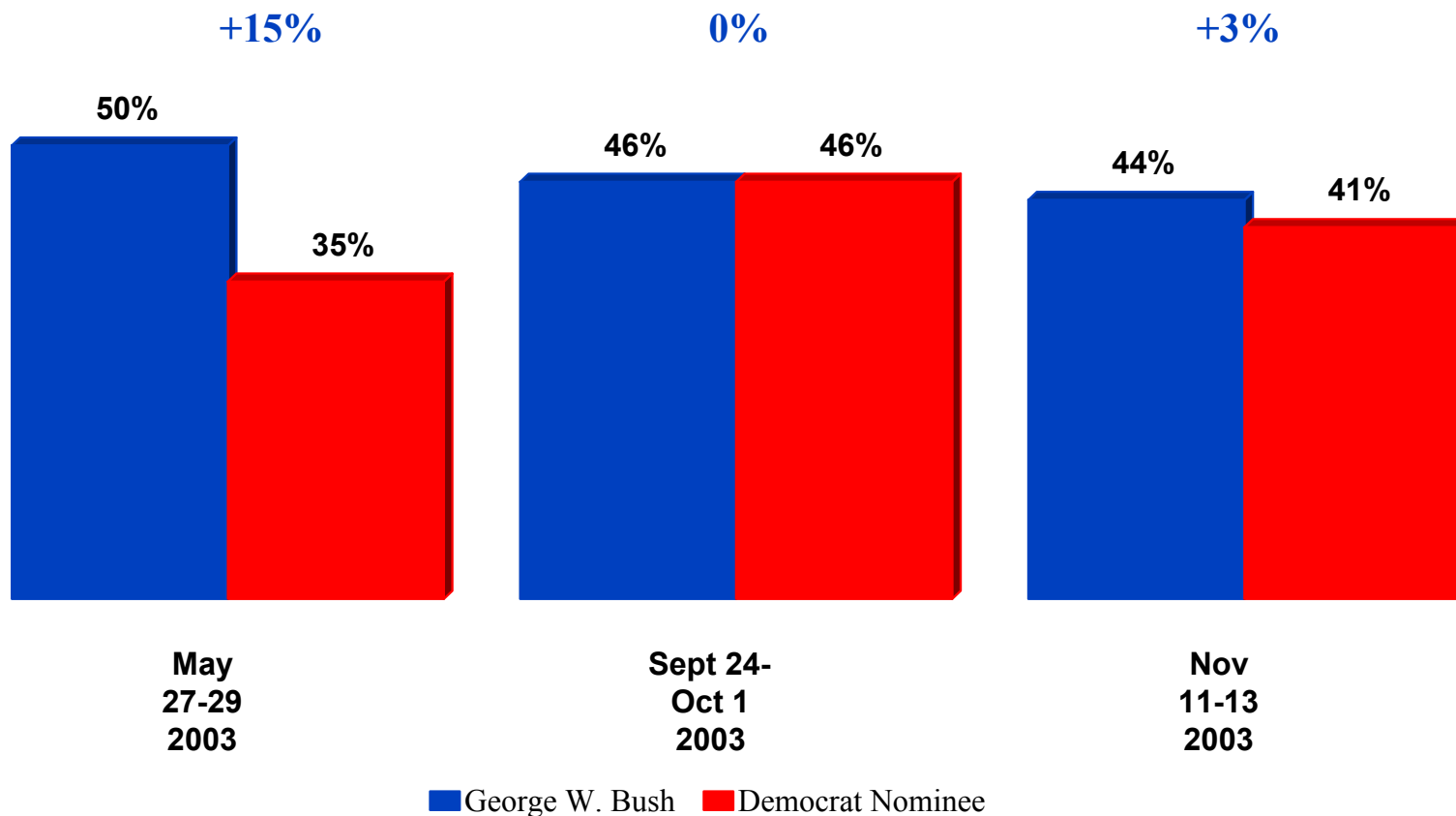
- GI Generation
- Liberals
- Age 65+
- Independents
- Democrats
- Women
- Gore 2000 Voters
- Whites
- Working Women
- Silent Generation
- African Americans
- College Grad
- White Women
- South Region
- West Region

Situation in Iraq

	<u>Sept 2003</u>	<u>Nov 2003</u>	<u>D/S</u>
GI Generation (age 79-102)	11%	44%	+33%
Gore 2000 Voters	15%	40%	+25%
Other Ethnicity	13%	36%	+23%
Liberals	18%	40%	+22%
Democrats	17%	36%	+19%
Women	13%	31%	+18%
White Women	12%	30%	+18%
College Grad	14%	32%	+18%
Working Women	11%	29%	+18%
Independents	11%	29%	+18%
Age 65+	16%	34%	+18%
West Region	12%	29%	+17%
Moderates	13%	30%	+17%
South Region	12%	28%	+16%
Baby Boomers (age 43-60)	13%	28%	+15%
HS or less	14%	29%	+15%
White	14%	28%	+14%
Silent Generation	17%	31%	+14%
African American	12%	25%	+13%

The generic presidential ballot continues to be within the margin of error.

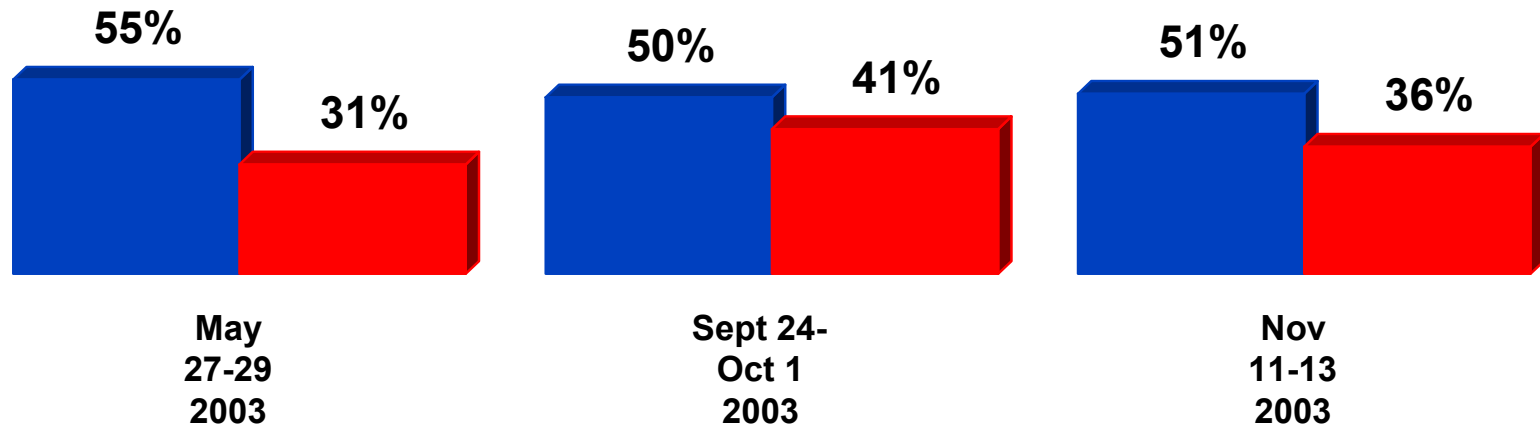
Generic Presidential Ballot



Now, I know it is a long way off, but thinking about the elections in 2004, if the election for president were held today and the candidates were Republican George W. Bush and the Democratic nominee for President — for whom would you vote, Republican George W. Bush or the Democratic nominee for President?

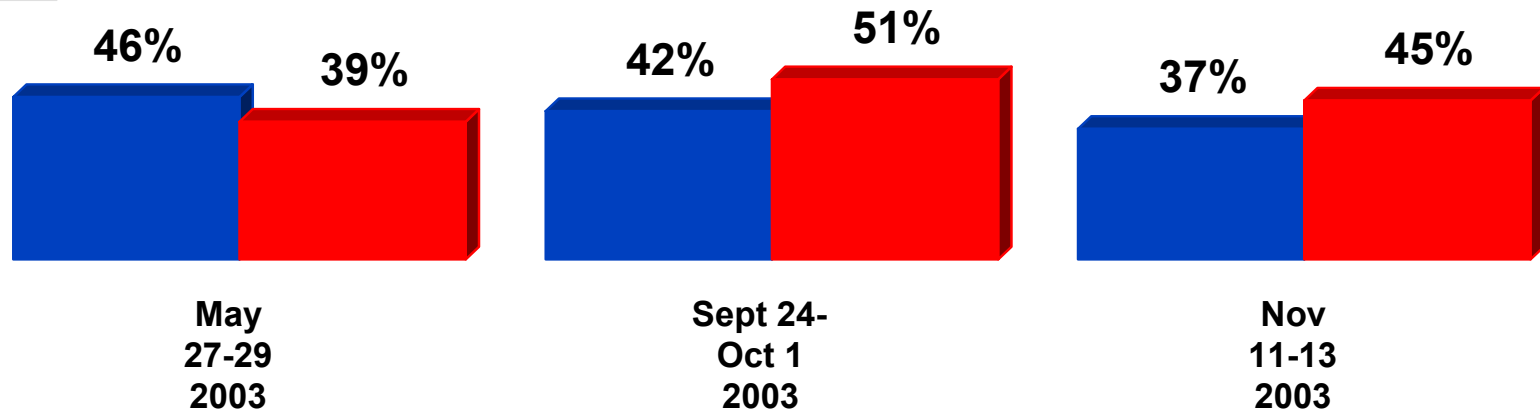
Tracking Generic Presidential Ballot by Gender

Men



■ George W. Bush ■ Democrat Nominee

Women

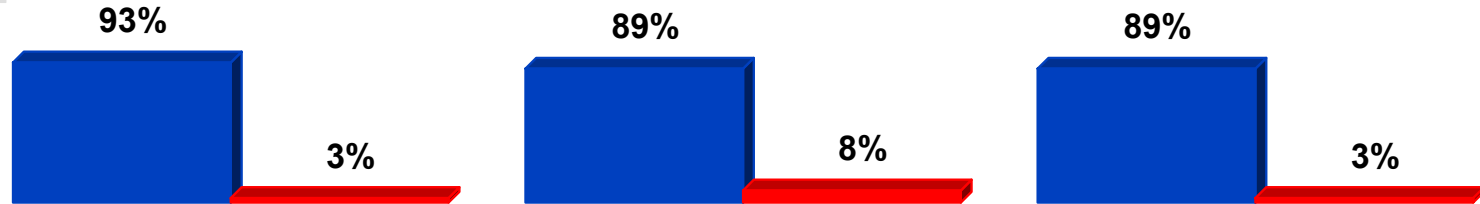


■ George W. Bush ■ Democrat Nominee

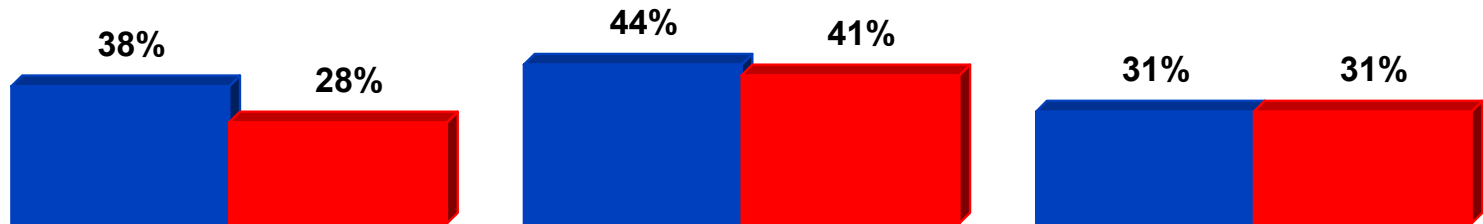
Now, I know it is a long way off, but thinking about the elections in 2004, if the election for president were held today and the candidates were Republican George W. Bush and the Democratic nominee for President — for whom would you vote, Republican George W. Bush or the Democratic nominee for President?

Tracking Generic Presidential Ballot by Party

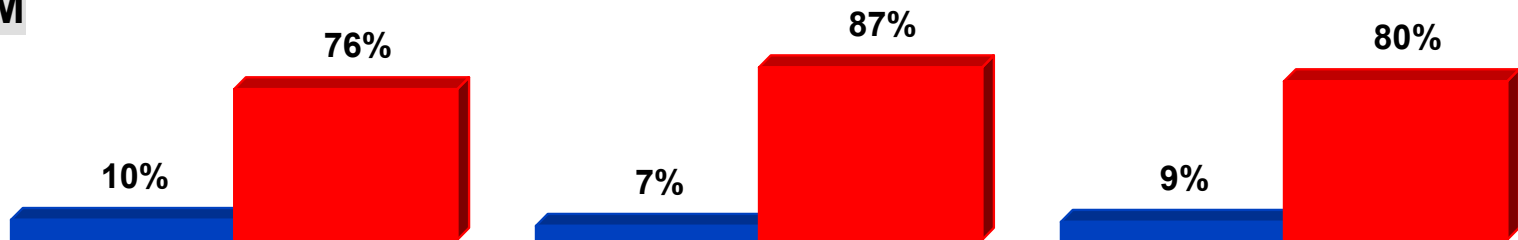
GOP



IND



DEM



May
27-29
2003

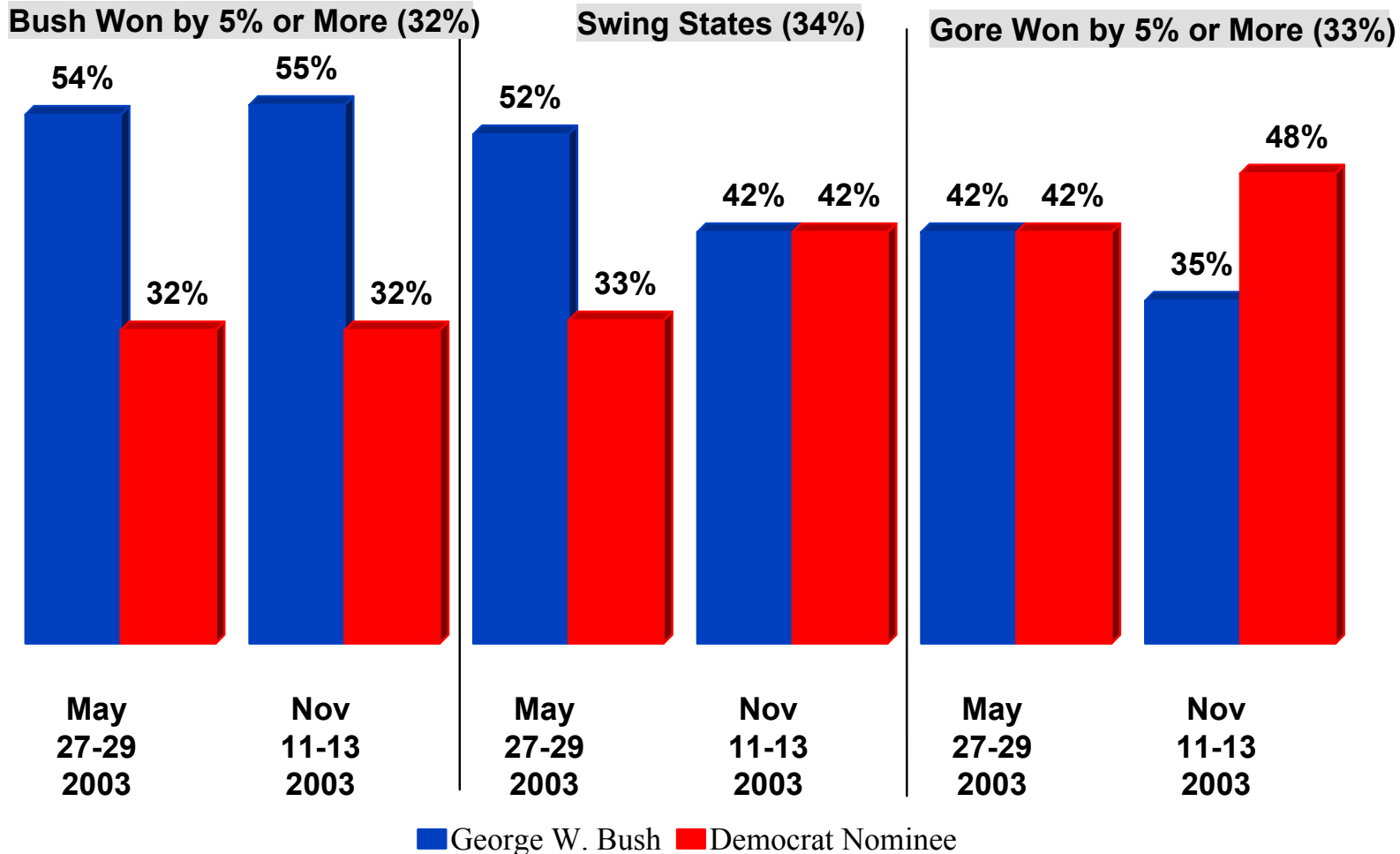
Sept 24-
Oct 1
2003

Nov
11-13
2003

■ George W. Bush ■ Democrat Nominee

Now, I know it is a long way off, but thinking about the elections in 2004, if the election for president were held today and the candidates were Republican George W. Bush and the Democratic nominee for President — for whom would you vote, Republican George W. Bush or the Democratic nominee for President?

Tracking Generic Presidential Ballot by Bush/Gore States

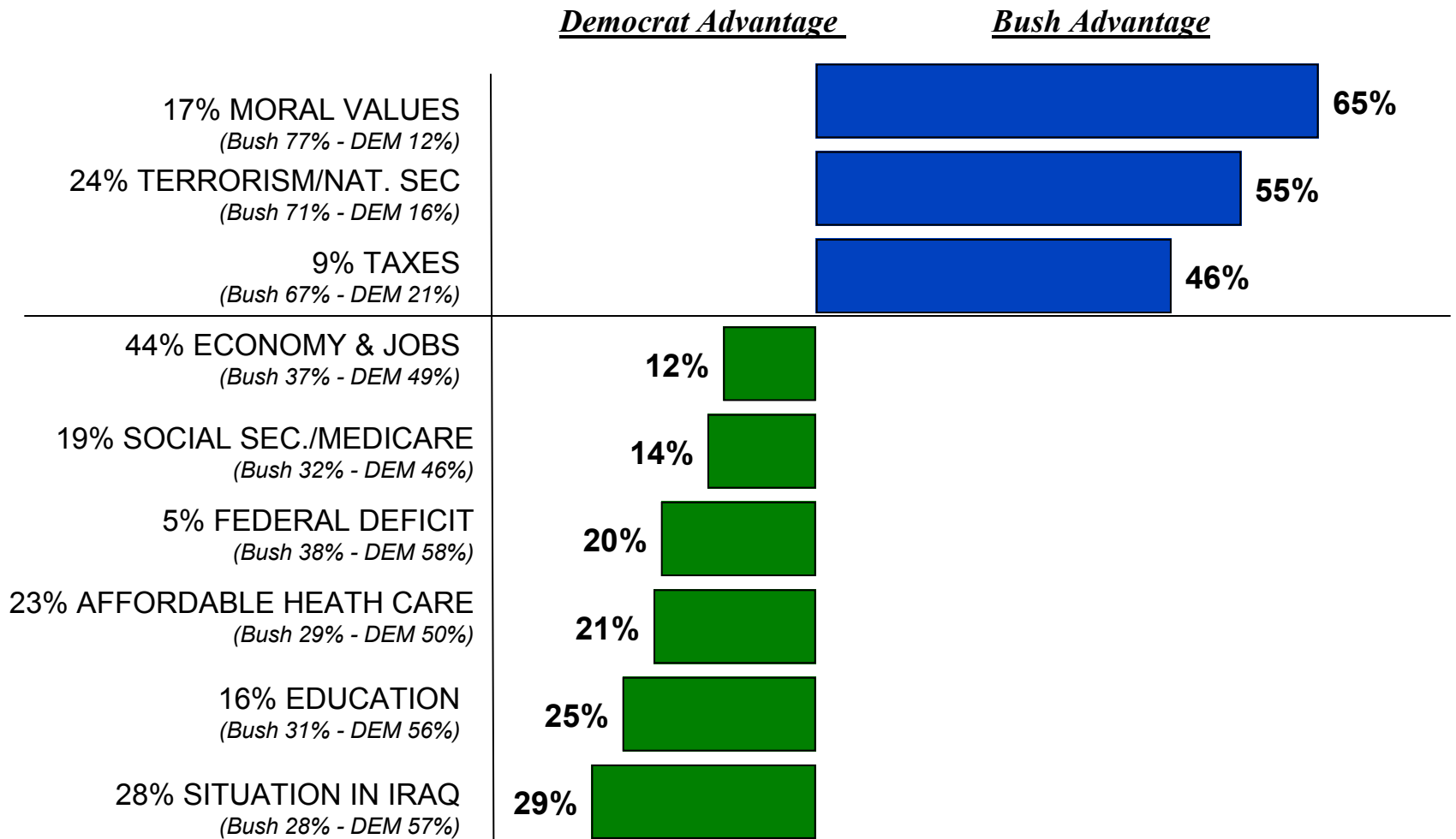


Now, I know it is a long way off, but thinking about the elections in 2004, if the election for president were held today and the candidates were Republican George W. Bush and the Democratic nominee for President — for whom would you vote, Republican George W. Bush or the Democratic nominee for President?

A voter's 2000 vote decision continues to profoundly impact their current attitudes.

	2000 Bush Voters (51%)	2000 Gore Voters (37%)
Right Direction/Wrong Track	70%/23%	9%/83%
Bush job approval Approve/Disapprove	87%/11%	17%/80%
Generic Presidential Ballot Bush/Democrat nominee	78%/8%	5%/84%

Presidential ballot by respondent's top TWO most important issues



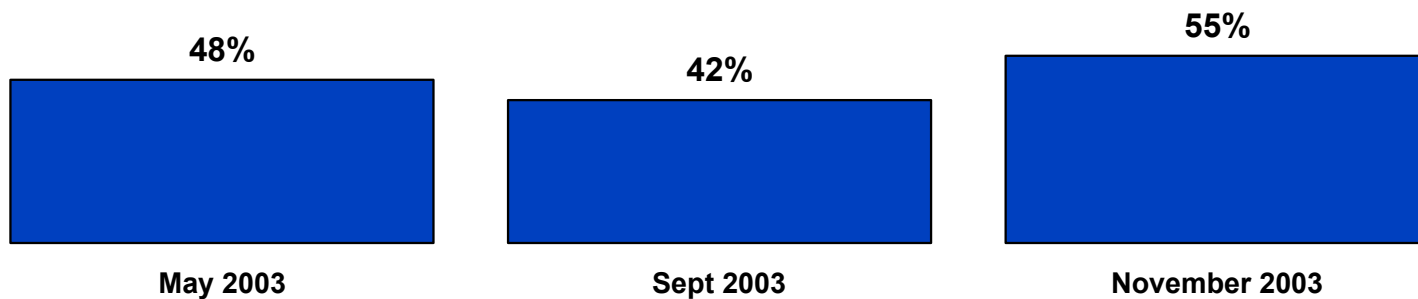
Tracking by the two different faces of issues related to foreign policy and security.

(Bush percent of generic presidential vote minus Democrat percent of generic presidential vote equals net difference score)

Ballot by Situation in Iraq (28%)



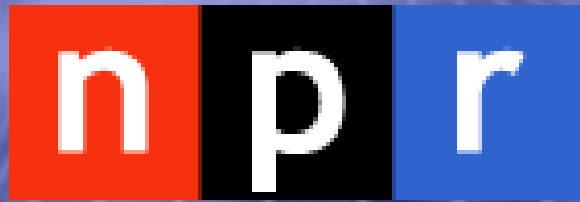
Ballot by Terrorism/National Security (24%)



It's not surprising Bush is losing among those focused on "the situation in Iraq" or is winning among those focused on "national security and terrorism" when one looks at the sub-groups most likely to select these issues as being an issue of top concern.

<u>The Situation in Iraq</u>	<u>28%</u>
60+ Retired Women	46%
GI Generation (Age 79-102)	44%
Liberals	40%
Democrat Women	40%
Gore 2000 Voters	40%
Women 65+	38%
White Democrats	38%
Other Ethnicity	36%
Women 55+	36%
Democrats	36%
60+ Retired Men	34%
Age 65+	34%
Not Married	34%
Rural Women	34%
Age 55-64	33%
White Northeast Region	33%
Household Income Under \$20K	33%
College Graduates	32%

<u>Terrorism and National Security</u>	<u>24%</u>
Republican Men	41%
Independent Men	38%
Republicans	37%
Household Income more than \$80K	35%
More than College	34%
Deep South	34%
White Men	33%
Republican Women	33%
Bush 2000 Voters	33%
Men 55+	32%
White South	32%
Men 18-34	31%
Married Men	31%
Farm Belt	30%
Conservatives	30%
College Graduate	30%
Suburban Men	30%
Men	29%
Union Household	29%
White Northeast	28%
Pacific	28%
Suburban	28%



Measuring Attitudes About the Economy

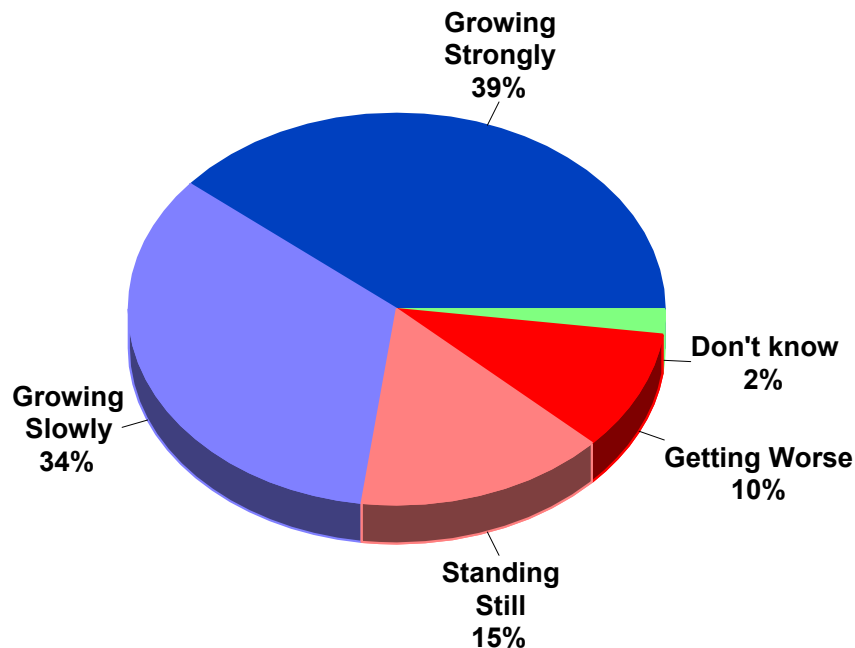


While a majority of Americans say the economy is growing, it's a very different picture than attitudes in the late 90's.

American Economy Today

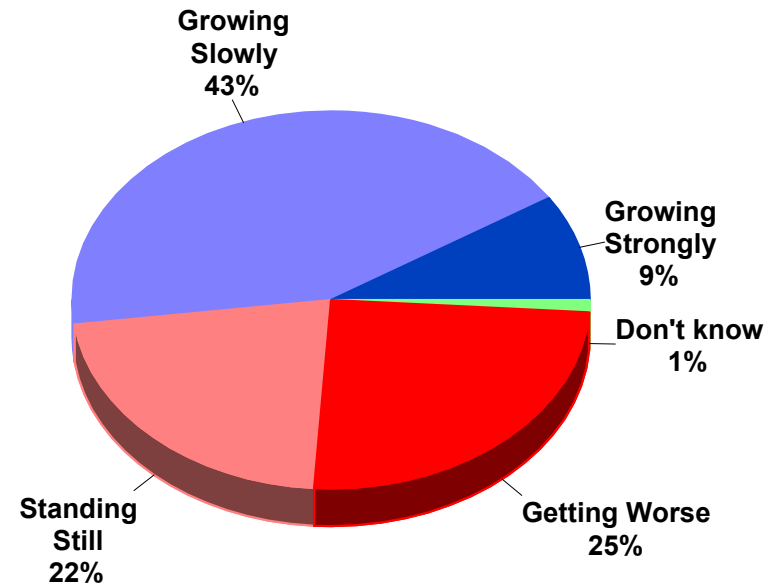
January 1999*

Total Growing 73%
Total Still/Worse 25%



November 2003

Total Growing 52%
Total Still/Worse 47%



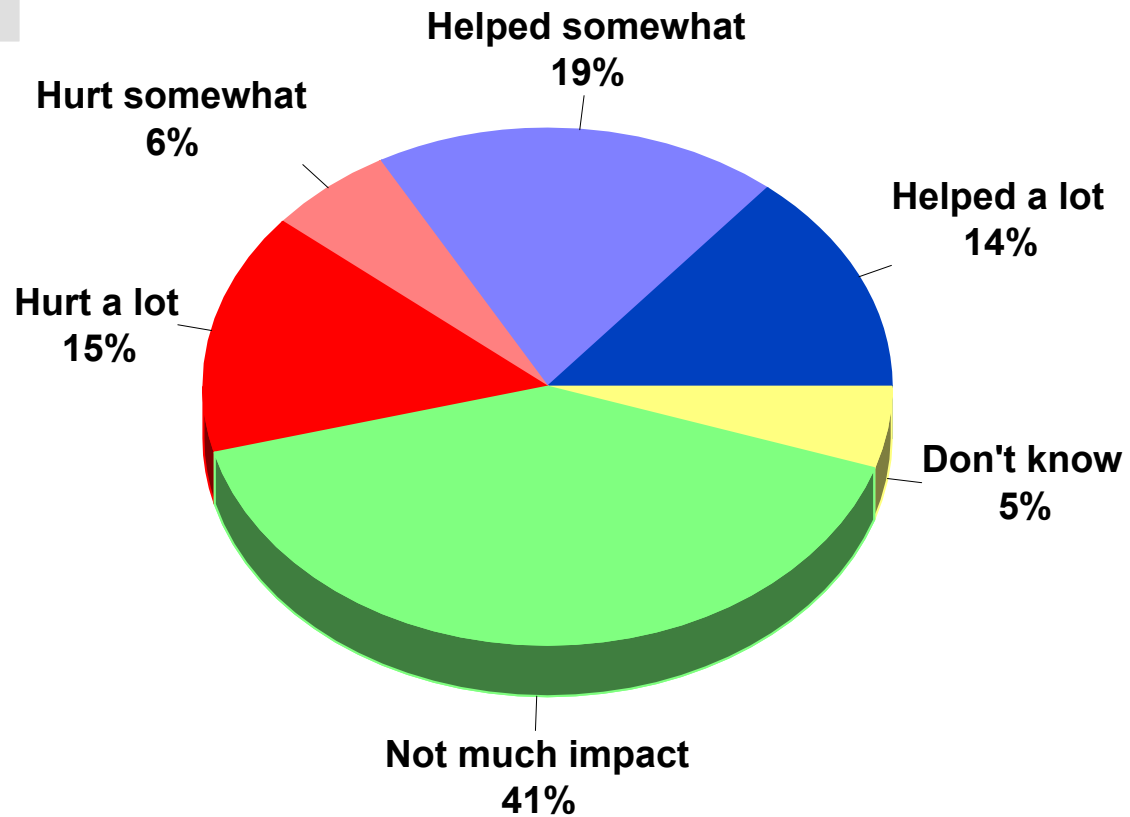
How would you describe the American economy today..

* Louis Rukeyser's 1999 Money Guide Poll conducted by Opinion Research Corporation, January 2-4, 1999 with 1,005 adults nationally.

While 41% of voters say the Bush tax cut has had “not much impact,” a small plurality of Americans believe President Bush’s tax cuts have helped the economy.

Views on Tax Cuts

Total Helped 33%
Total Hurt 21%

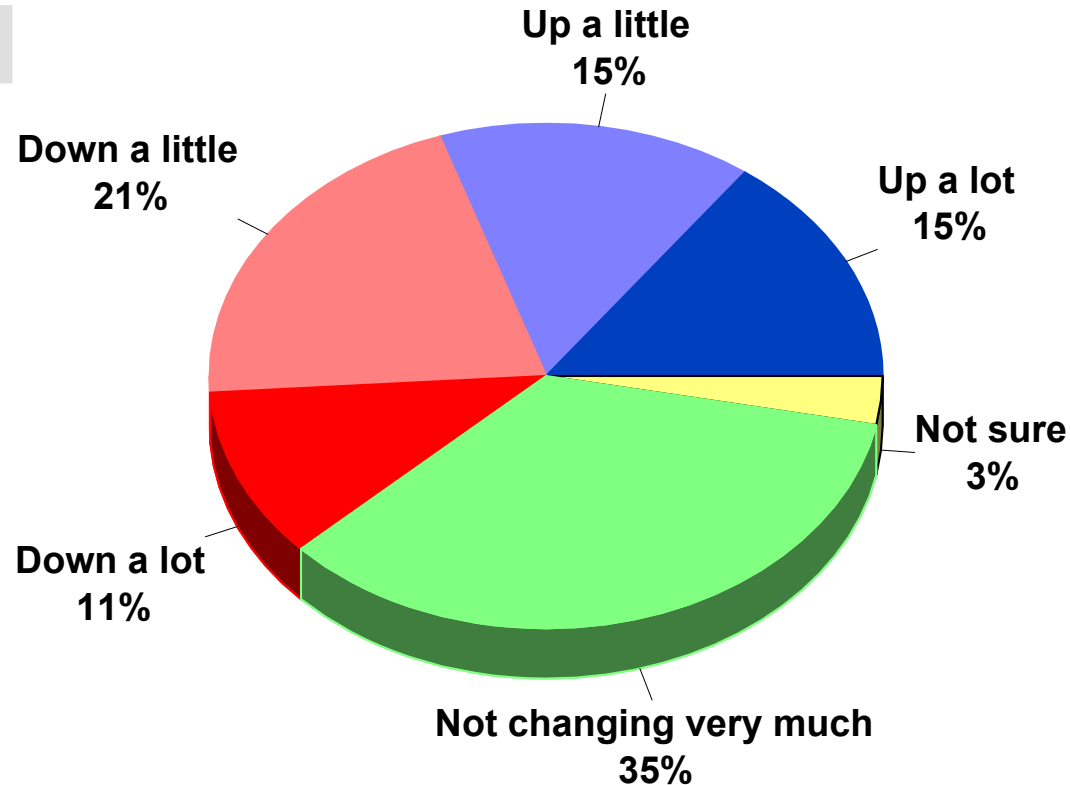


And, do you believe the tax cuts that were passed by Congress and signed into law by President Bush have — helped or hurt — the nation's economy, or don't you think they've had much impact?

America is closely divided on whether they believe unemployment is going up or down.

Views on Unemployment Rate

Total Going Up 30%
Total Going Down 32%



Overall, would you say the unemployment rate in this country is — going up or going down — or not changing very much?

Sub-group Views on Unemployment Rate

Going Down **32%**

GOP Men	49%
Total Conservative GOP	48%
GOP	45%
Men 18-34	41%
Total Conservative	41%
Outer South	40%
2000 Bush Voters	40%
Age 55-64	40%
60+Retired Women	39%
White South	39%
GOP Women	39%
\$60-80K	39%
Married Men	39%
White Men	38%
Moderate/ Liberal GOP	38%
More than \$80K	38%
Urban Women	37%
South	36%
Women 55+	36%
Men College+	36%
Labor Union Member	36%
Urban	36%
Suburban Men	36%

Not Changing **35%**

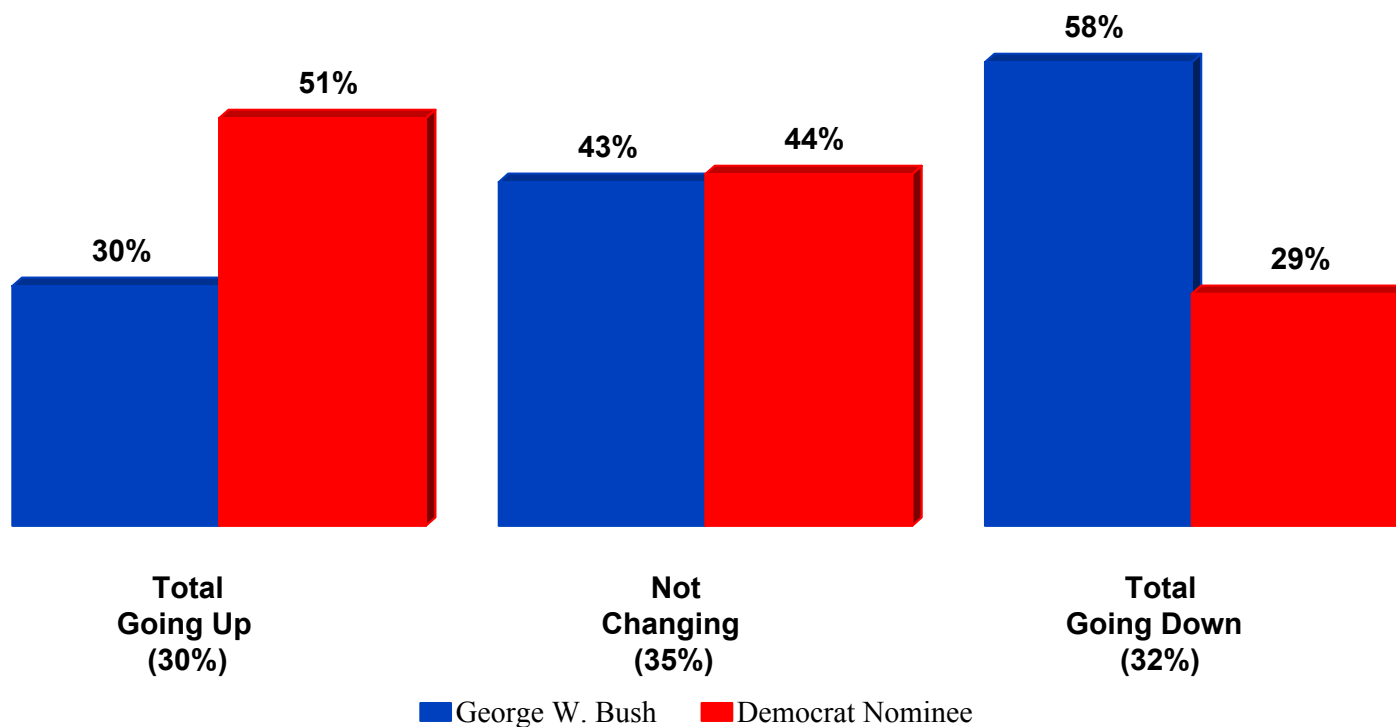
Conservative Independent	49%
Men 65+	48%
60+ Retired Men	48%
Mid Atlantic	46%
GI Generation (age 79-102)	46%
Northeast	45%
White Northeast	44%
Independent Men	44%
Farm Belt	42%
\$40-\$60K	42%
Moderate	42%
Women at Home	41%
Rural Men	41%
Men College+	40%
Women College+	40%
Age 35-44	40%
Age 65+	40%
College Graduate	40%
Men 55+	40%
Mountain	39%
Weak GOP	39%
Less than College	39%
Democratic Men	39%
Rural	39%
Suburban Men	39%

Going Up **30%**

Independent Women	42%
Other Ethnicity	41%
Liberal	39%
2000 Gore Voters	39%
\$20-40K	38%
Women 18-34	38%
White Dem	38%
Urban Women	38%
Rural Women	37%
Working Women	37%
Conservative Democrat	37%
Total Democrat	37%
Age 18-34	36%
Women Less than College	36%
Labor Union Household	36%
Conservative Independent	35%
Urban	35%
Women 35-54	34%
Women 65+	34%
African American	34%
Women	34%
White Women	34%
New England	34%
Deep South	34%
Independent	34%
Democratic Men	34%
Democratic Women	34%
Married Women	34%

The ballot by this question reminds us how pivotal the reality of whether unemployment is going up or down in the next year could play in deciding the 2004 election.

Generic Presidential Ballot by Unemployment Rate



Now, I know it is a long way off, but thinking about the elections in 2004, if the election for president were held today and the candidates were Republican George W. Bush and the Democratic nominee for President — for whom would you vote, Republican George W. Bush or the Democratic nominee for President?

Perceptions of the economy are shaped by some of the major variables that define the American political landscape.

- ✓ **Gender**
- ✓ **Ethnicity**
- ✓ **Party**
- ✓ **Income**

Key Economic Numbers by Gender

	Men (48%)	Women (52%)	White Men (40%)	White Women (40%)
Economy				
Growing	60%	45%	64%	48%
Getting Worse	18%	31%	15%	29%
Unemployment Rate				
Going Down	35%	30%	38%	29%
Going Up	25%	34%	21%	34%
Bush Tax Cuts				
Helped	42%	25%	46%	26%
Hurt	16%	26%	15%	23%

Key Economic Numbers by Ethnicity

	White (80%)	African American (10%)	Other Ethnicity (8%)
Economy			
Growing	56%	21%	53%
Getting Worse	22%	50%	26%
Unemployment Rate			
Going Down	33%	26%	27%
Going Up	28%	34%	41%
Bush Tax Cuts			
Helped	36%	14%	26%
Hurt	19%	36%	26%

Key Economic Numbers by Party

	Republicans (39%)	Independents (15%)	Democrats (44%)
Economy			
Growing	79%	47%	32%
Getting Worse	7%	34%	37%
Unemployment Rate			
Going Down	45%	26%	24%
Going Up	19%	34%	37%
Bush Tax Cuts			
Helped	63%	20%	11%
Hurt	3%	21%	38%

Key Economic Numbers by Income

	Under \$20K (11%)	\$20K-\$40K (24%)	\$40K-\$80K (17%)	\$60K-\$80K (14%)	More than \$80K (24%)
Economy					
Growing	43%	46%	51%	50%	67%
Getting Worse	34%	31%	19%	21%	19%
Unemployment Rate					
Going Down	30%	27%	27%	39%	38%
Going Up	24%	38%	25%	24%	29%
Bush Tax Cuts					
Helped	27%	30%	32%	34%	41%
Hurt	34%	27%	13%	10%	18%

Voters clearly tell us they believe the most important measures of whether the economy is improving are *all* connected to jobs.

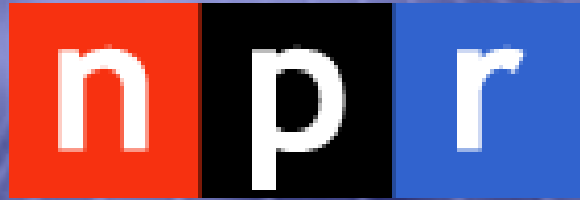
Measure of Economic Improvement	
New jobs would be created	34%
The unemployment rate would go down	31%
U.S. jobs would not go overseas	30%
People would keep more of what they earn because of lower taxes	26%
The stock market would go up	19%
Health care costs would stop rising so fast	18%
The federal deficit would stop growing so fast	18%
Average wages would increase	14%

There are many ways to measure what people mean when they say the economy is getting better. Which TWO of the following do you believe are the most important ways to decide if the economy is improving?

Voters are most likely to believe the stock market is going up.

View of Current Economy	
The stock market is going up	29%
The unemployment rate is going down	21%
People are keeping more of what they earn because of lower taxes	19%
New jobs are being created	13%
U.S. jobs are not going overseas	10%
Health care costs are not rising so fast	9%
The federal deficit is not growing so fast	8%
Average wages are increasing	7%
None of these are happening	26%

Now I am going to re-read this list to you and please tell me which TWO, IF ANY, best describes today's CURRENT economy.



Testing Statements on Economic Policy



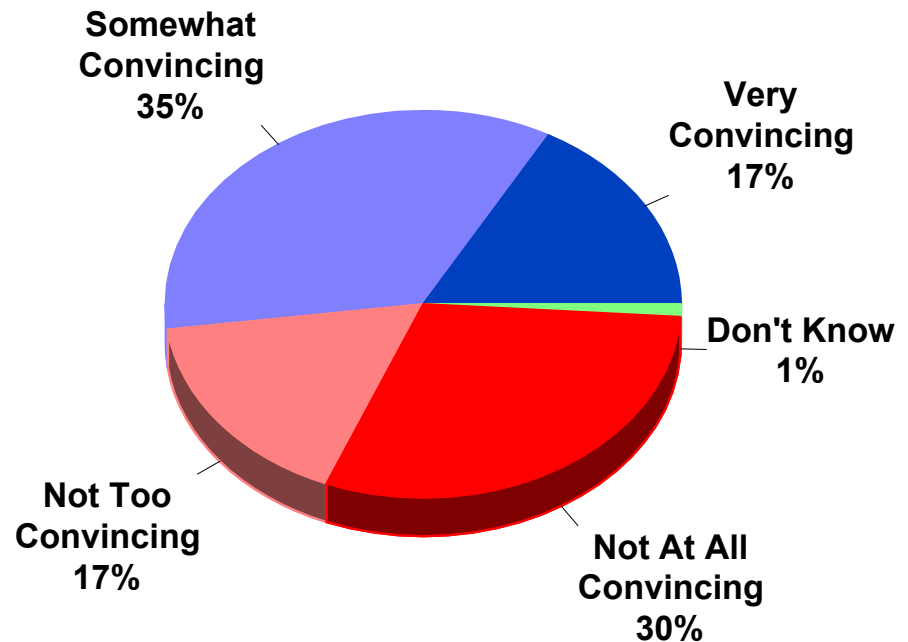
We tested two hypothetical statements about the economy. We tested a sample statement that might be made by President Bush or the Democratic nominee for president.

Voters were then asked to select the statement that best describes what they think.

Bush Statement on Economic Policy

President Bush says we are seeing important signs of a significant improvement in the American economy. In the last three months the economy has grown at its fastest rate in twenty years. Over a quarter of a million new jobs have been created in just the last three months, and the number of people filing jobless claims dropped to the lowest level since the September 11th attacks. Other good news includes a sharp rebound by the stock market and an increase in the American workers' average wage. Bush says his tax cuts are working by allowing people to keep more of what they earn and contributing to the very significant economic improvement we are beginning to see take place. Bush's overall economic plan has provided an increase in funding for education, added four hundred billion dollars for a new prescription drug benefit for seniors, and has kept our commitment to Social Security.

Total Convincing	52%
Total Not Convincing	47%

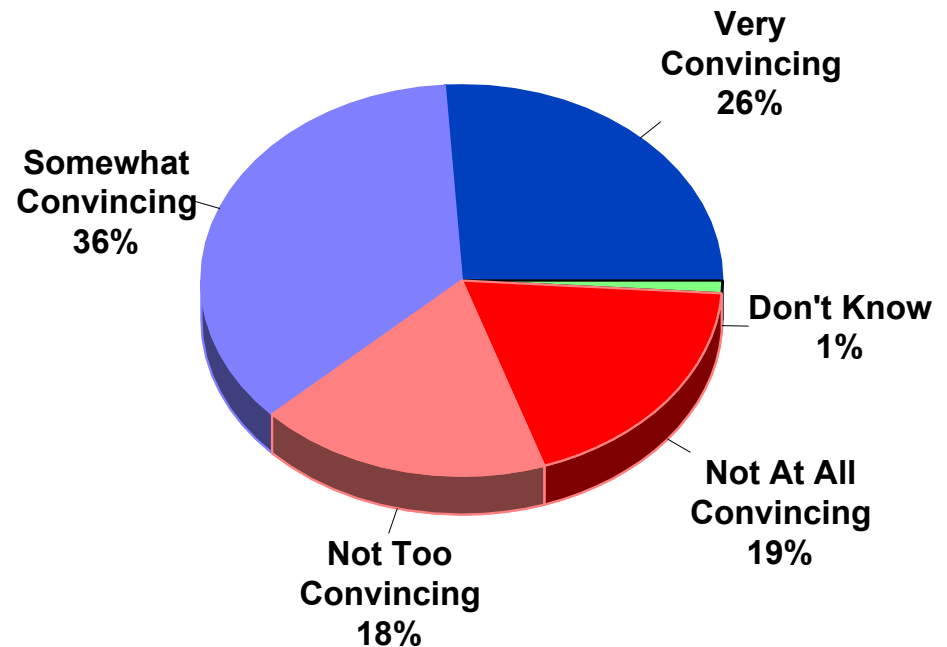


Now, do you find that statement to be — very convincing, somewhat convincing, not too convincing, or not at all convincing?

Democrat Nominee Statement on Economic Policy

The Democratic nominee for president says that we need a change in economic direction. After three years of declining employment and wages and manufacturing jobs going overseas, we need a plan that is good for middle America. Bush's current plan includes yet bigger tax cuts for big corporations and the richest one percent, exploding deficits that threaten Social Security and education and has no plan whatever to limit the rise of health care and prescription drug costs. It is not good enough that the stock market go up, while unemployment remains unchanged and wages can't keep up with rising costs. We need a new economic direction with middle class tax cuts, tougher enforcement of our trade laws to keep jobs in America, action to get health care costs under control, and lower deficits so we can afford to invest in education and preserve Social Security.

Total Convincing	62%
Total Not Convincing	37%

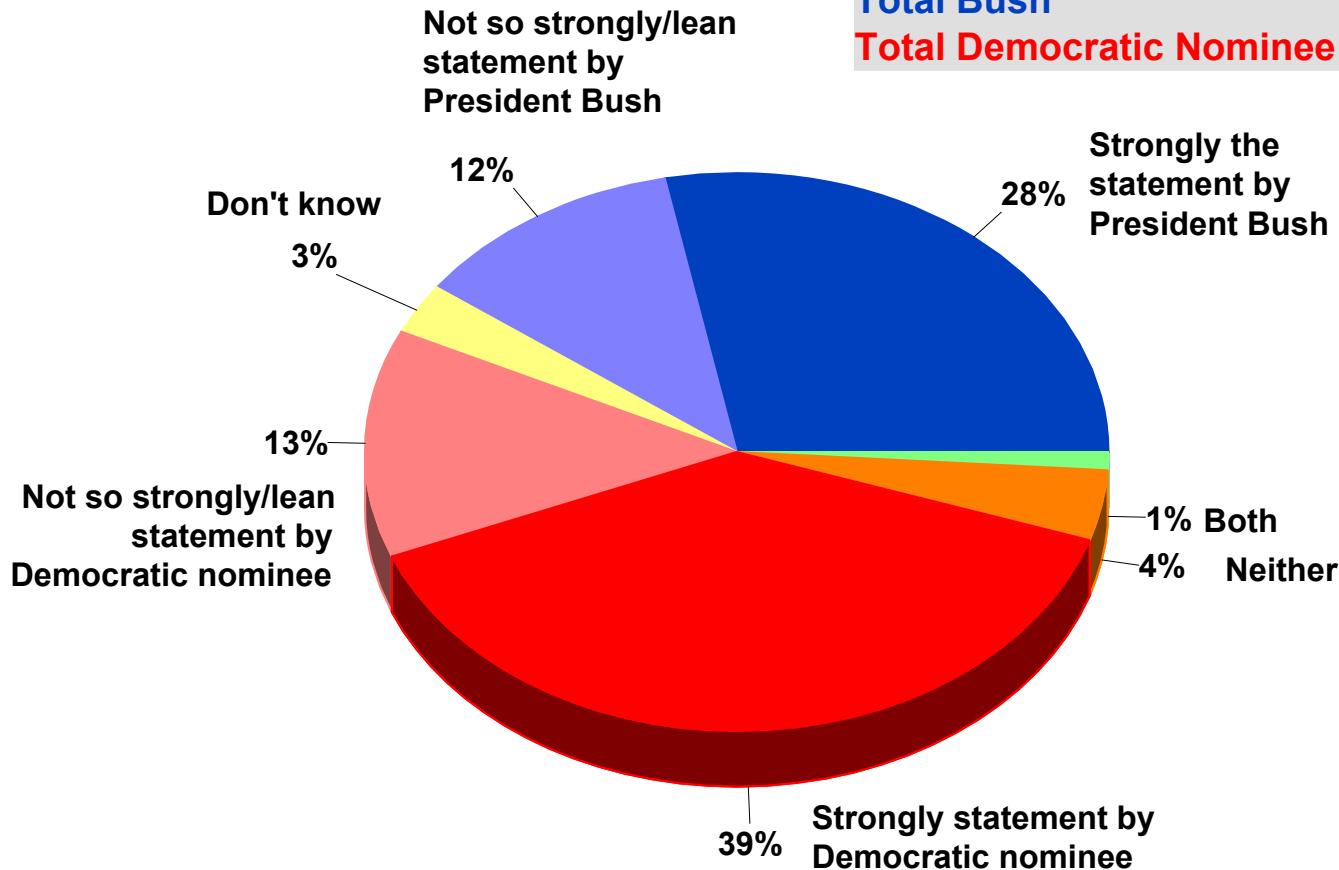


Now, do you find that statement to be — very convincing, somewhat convincing, not too convincing, or not at all convincing?

A majority of voters select the statement by the Democrat nominee for president.

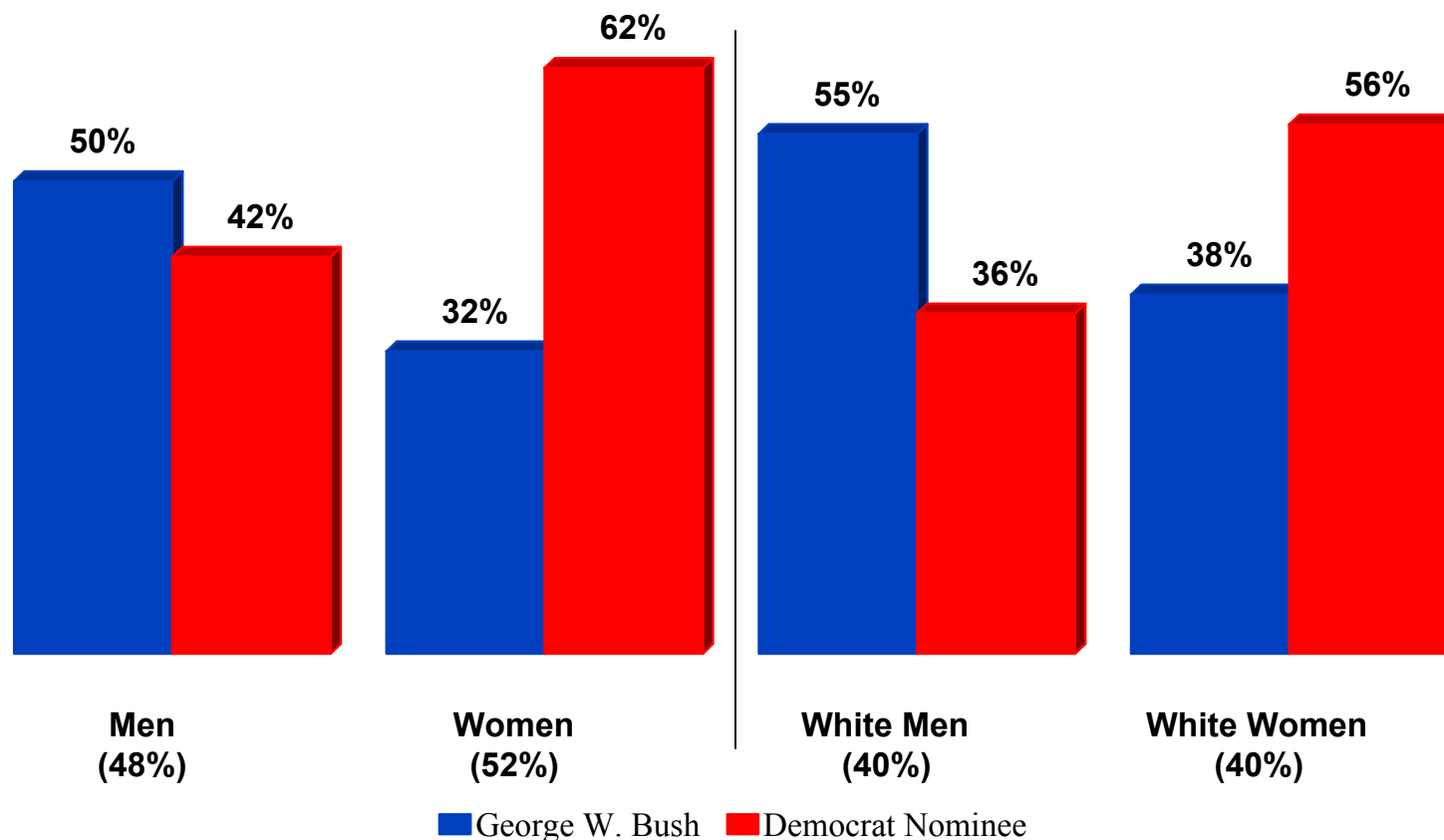
Statements on Economy

Total Bush	40%
Total Democratic Nominee	52%



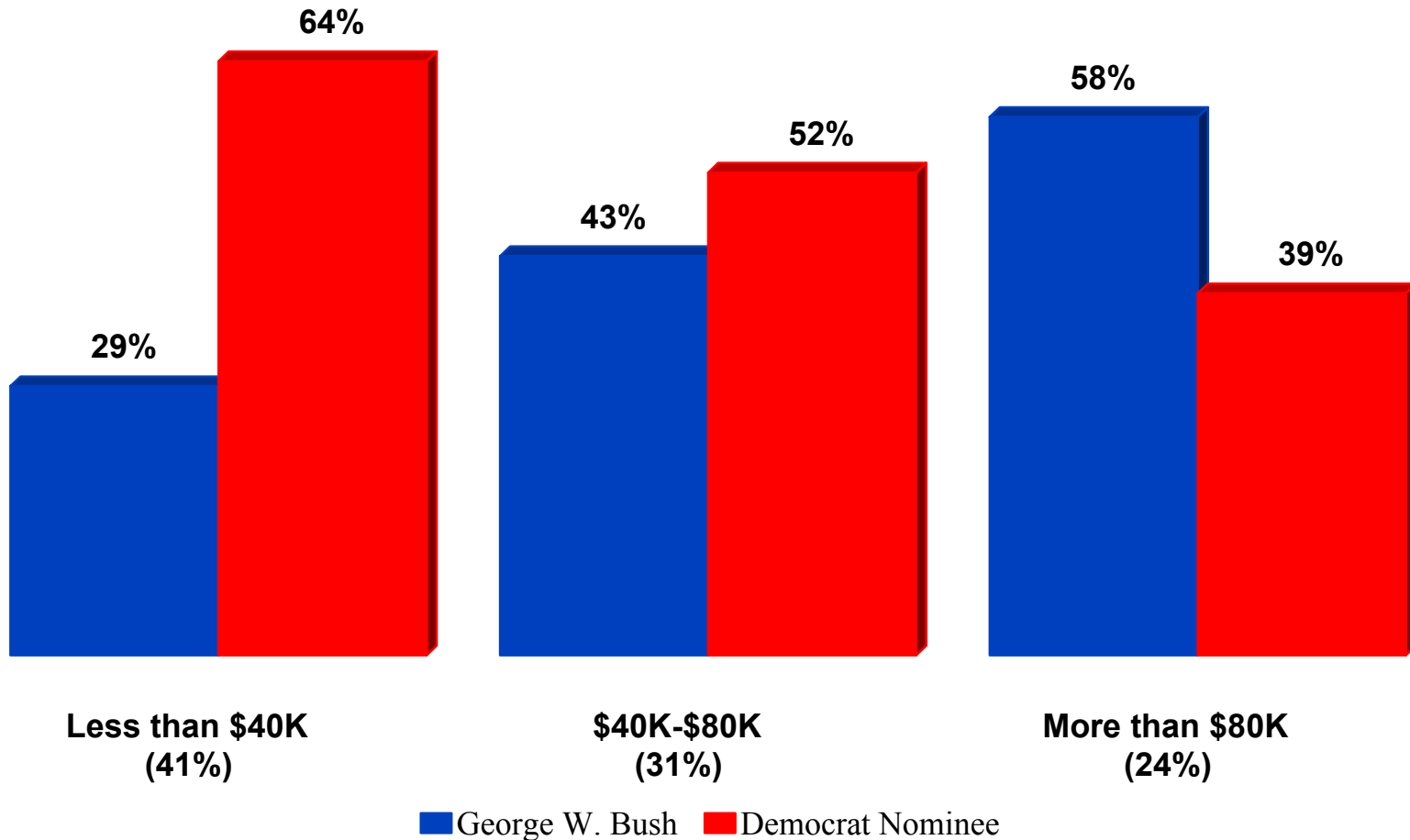
Now, considering again the statements I just read about the economy..Which of those two statements best describes what you think — the statement by President Bush or the statement by a Democratic nominee for President?

There's a sharply different reaction by gender to these statements on economic policy when asked to select the one that best describes what voters think.



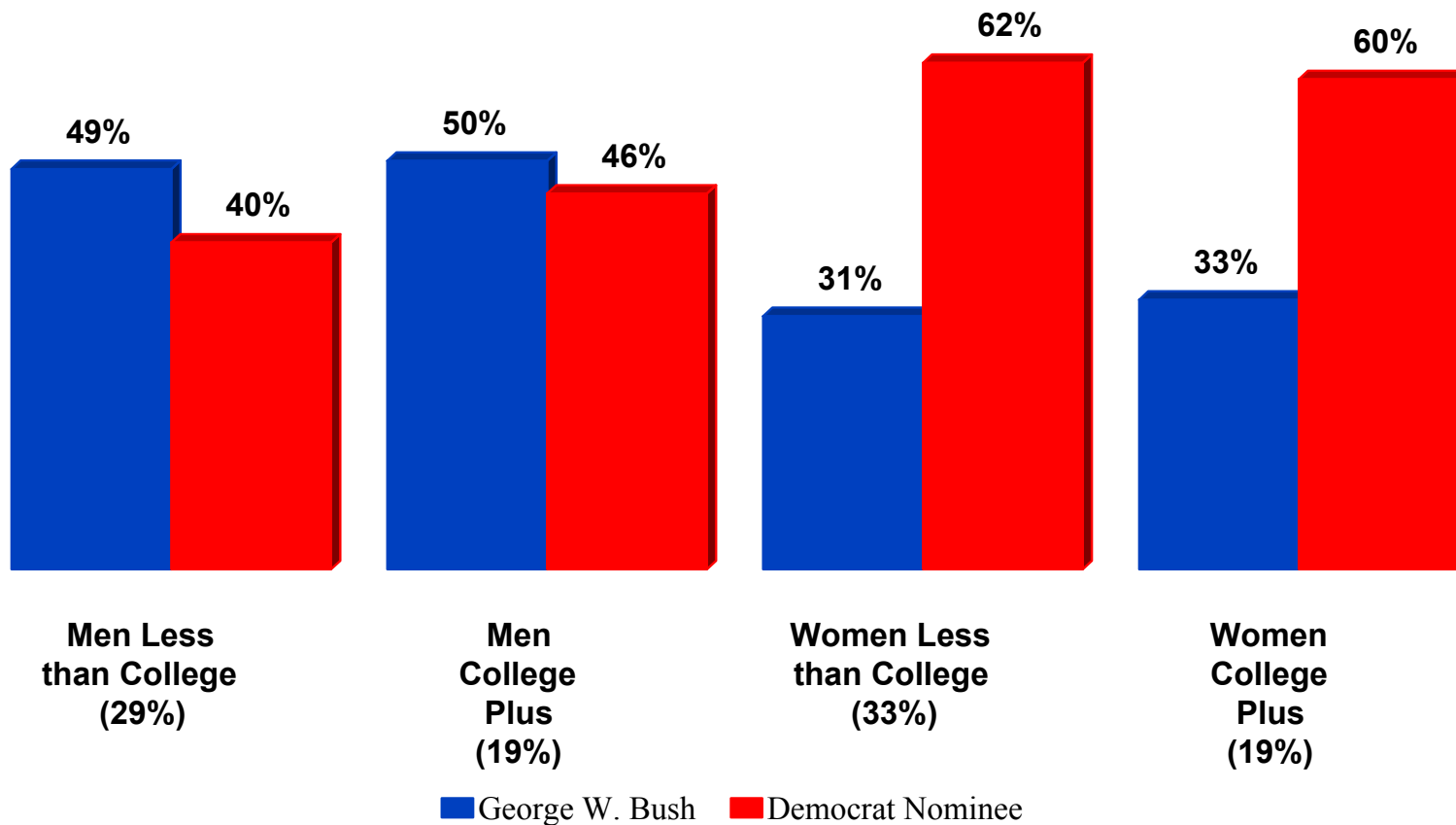
Now, considering again the statements I just read about the economy..Which of those two statements best describes what you think — the statement by President Bush or the statement by a Democratic nominee for President?

...and by income.

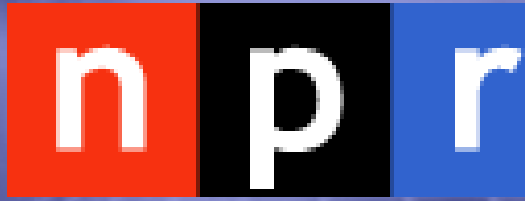


Now, considering again the statements I just read about the economy.. Which of those two statements best describes what you think — the statement by President Bush or the statement by a Democratic nominee for President?

Gender plays a far sharper role than level of formal education in shaping attitudes on this issue.



Now, considering again the statements I just read about the economy..Which of those two statements best describes what you think — the statement by President Bush or the statement by a Democratic nominee for President?

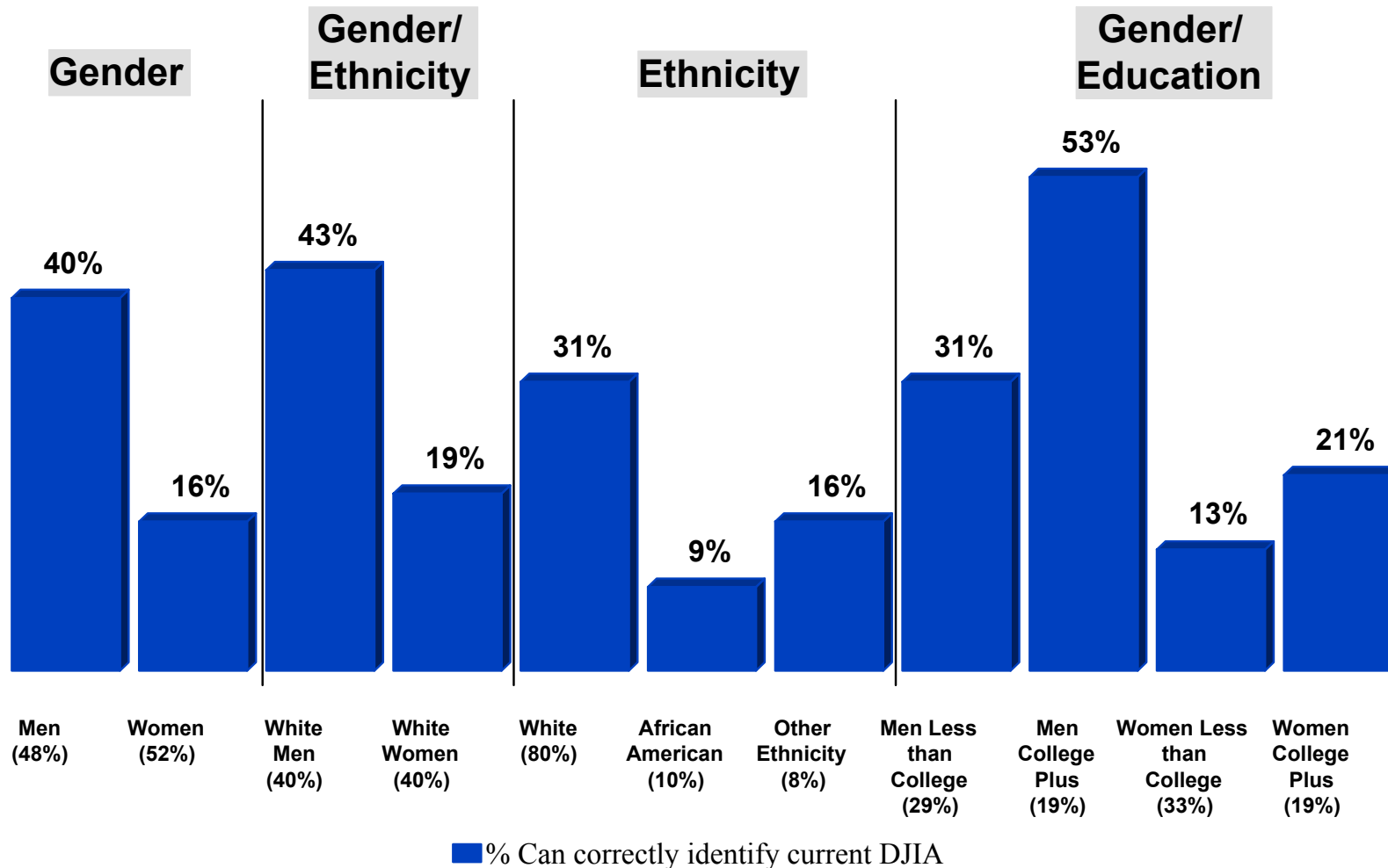


Measuring America's "Economic Literacy" and a Look at the "Investor Class"



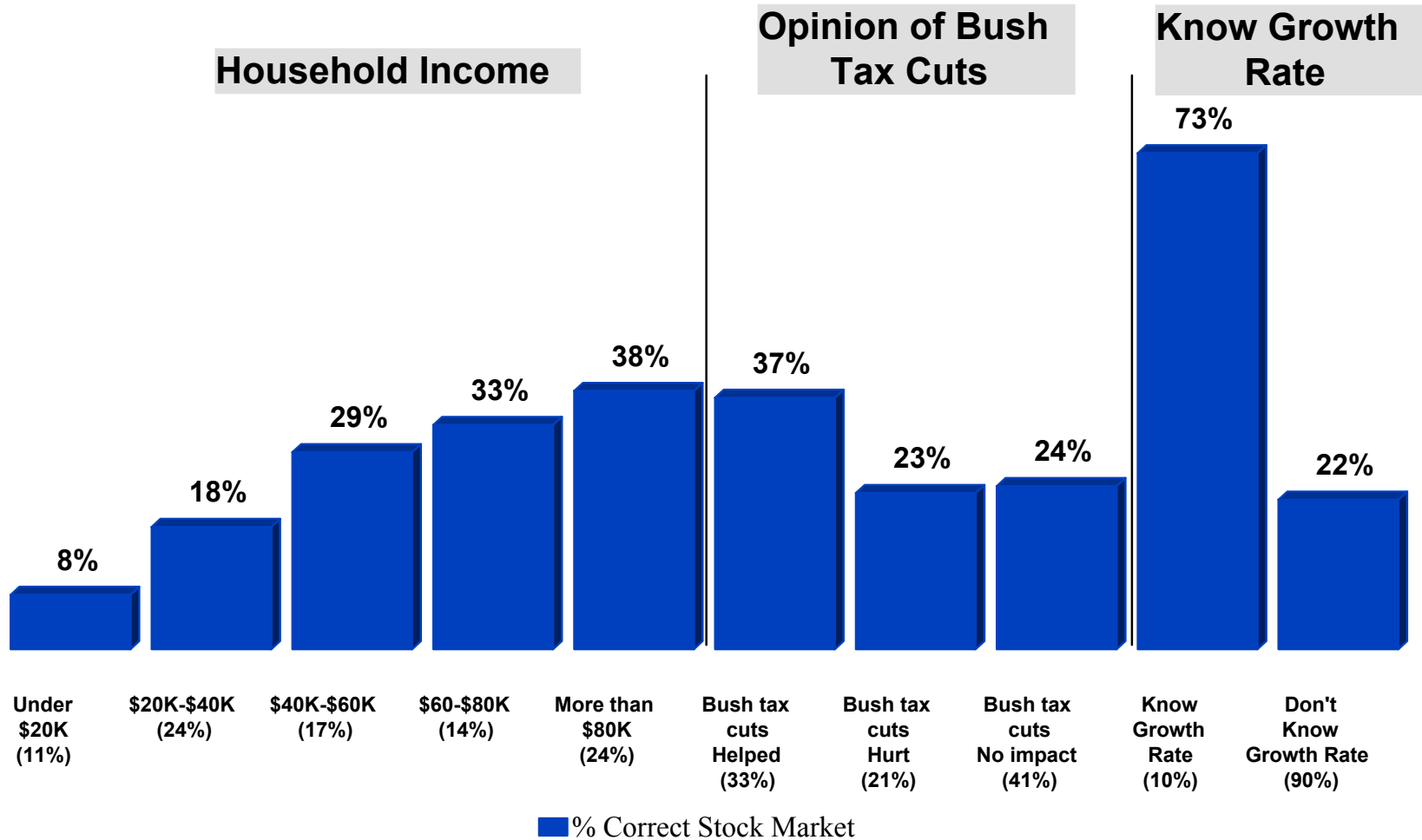
- ✓ **Sixty - five percent (65%) of voters “currently have money invested in stocks or stock mutual funds.”**
- ✓ **Twenty-seven percent (27%) of voters can correctly provide an estimate within a range of 500 points of the Dow Jones Industrial Average (DJIA).**
- ✓ **Ten percent (10%) of voters correctly identified third quarter growth in the GNP as being around seven percent (7%).**

Profiling key sub - groups ability to correctly identify the current Dow Jones Industrial Average (DJIA).



Do you or your spouse currently have money invested in stocks or stock mutual funds?

Profiling key sub-groups ability to correctly identify current Dow Jones Industrial Average (DJIA).



Do you or your spouse currently have money invested in stocks or stock mutual funds?

Key numbers by Investment Ownership and DJIA knowledge

	Own Investments (65%)	No Investments (32%)	Know Dow Jones Average (27%)	Don't know Dow Jones Average (67%)
Economy				
Growing	55%	47%	67%	46%
Getting Worse	21%	32%	14%	30%
Unemployment Rate				
Going Down	34%	28%	38%	30%
Going Up	25%	37%	20%	33%
Bush Tax Cuts				
Helped	35%	30%	45%	28%
Hurt	17%	28%	18%	23%

	Own Investments		Know Dow Jones Average	
	Yes (65%)	No (32%)	Yes (27%)	No (67%)
Right Direction/Wrong Track	47%/45%	35%/56%	52%/41%	37%/53%
Bush Approve/Disapprove	58%/40%	49%/45%	63%/35%	51%/45%
Generic Presidential Ballot Bush/Democrat nominee	46%/40%	38%/42%	55%/34%	38%/44%