

# US Politics and The Greening of America



## Introduction

Everybody is going Green.

US New and World Report's popular rankings of the nation's best universities, medical and law schools now include a green rating. Newsweek Magazine recently devoted the majority of a an issue (Green Speed, A Global Ranking of Nations with the Best, and Worst, Environmental Track Records, July 14, 2008) to national green attitudes.

The market research industry is keeping up with these developments, with an increasing amount of green segmentations commissioned, and major research firms and ad agencies are racing to establish their own propriety green score for companies. Something for the marketing departments to harp on. Green - the new color of presidential politics – is not referring to money.

Just what are green beliefs? How do they impact voting behaviors? Is it true that Democrats are greener than Republicans?

This report examines the results of a nationwide survey of more than 20,000 respondents, including the segmentation of issues impacting voting choice, whether voting choices match how people view an issue's effect on their quality of life, and how attitudes towards government and individual responsibility jive with green beliefs.

## Political Affiliation and Voting Patterns

### Party Affiliation

The sample of over twenty thousand respondents includes people from across the political spectrum. Those identifying themselves as Democrats outnumber Republicans by a significant margin (37% vs. 28%), which is not surprising given the current political climate. Another 29% categorize themselves as independent voters and 6% said they belong to some other political party.

Democrats appear to be somewhat more vested in their political party as well. More than half (59%) of these respondents categorized themselves as “strong Democrats” while among Republicans, just 52% consider themselves “strong Republicans.”

### Voting Patterns

Asked which party they usually vote for, Democrats and Republicans claimed they are mostly loyal to their party, although there is some cross-over potential. Among the Democrats, only a little more than half (53%) said they almost always vote Democratic while 46% of the Republicans made the same claim about their party. Most of the remainder indicated that they vote along party lines more often than not. However, a small number, 8% of democrats and 11% of republicans claimed they vote equally for candidates of either party.

Independents are fairly evenly split in terms of their claimed voting behavior. The largest number (40%) said they vote equally for Democrats and Republicans. Additionally, 27% said they vote for Democrats “most of the time” and 19% claimed they vote for republicans “most of the time.”

### Primary Voting

Democrats and Republicans appear to take their party membership seriously. The vast majority said they are absolutely certain or at least very likely to vote in their party's primary (86% of Democrats and 81% of Republicans). Two-thirds (66%) of Independent voters also said they planned to vote in a primary election.

Although each party's membership are fairly united in terms of their intent to vote in the primary, there is much less consensus as to which candidate they will vote for.

Among likely Democrat primary voters, slightly more than one-third (35%) claim they will vote for Hillary Clinton and just over a quarter (26%) name Barack Obama as their

candidate of choice. The only other Democratic primary candidate with any substantive mention is John Edwards, who would receive the vote from 12% of the democrats. As many as 22% of Democratic voters said they are currently undecided. However, when asked who they are leaning towards, share of votes climbs for each of these candidates: Hillary Clinton earns 42% mention, Barack Obama 31% and John Edwards garners a 16% share of the vote.

The Republican field is even less cohesive at this point in time. Rudy Giuliani commands the lead with just 27% of likely Republican primary voters with Fred Thompson, John McCain and Mitt Romney garnering shares of 16%, 12% and 11%, respectively. More than one (29%) quarter of republicans said they were undecided. Once these undecided voters are asked who they're leaning towards, Rudy Giuliani's share rises to 36%, Fred Thompson's to 20%, John McCain's to 19% and Mitt Romney's share goes to 15%.

## **Issues Segmentation**

### **Influence of Issues**

Voters have diverse concerns going into the next national election. However, environmental issues are currently a middling concern to them. Respondents were asked to rate how much influence each of 13 issues would have on their voting behavior in the national election on a 7-point scale. The three issues that top their list as having most influence included the global war on terrorism, healthcare and the economy, earning average ratings of 5.9, 5.7 and 5.6, respectively.

Other issues that earned average ratings of at least 5.0 on the 7-point scale included: social security or Medicare reform (5.4), quality of public education (5.3), energy prices (5.2), environmental issues (5.2) and crime (5.0).

Several issues were deemed less influential by these respondents, earning average ratings of less than 5.0. These included business and financial issues (4.8), science and technology issues (4.4), Gun rights/control (4.4), Abortion issues (4.4) and diet, health and nutrition issues (3.7).

## Segmenting Consumers On Issues

Using a statistical technique called "Cluster Analysis," it is possible to create attitudinal segments of consumers using the issues statements. Cluster analysis creates groups or clusters of respondents based on those with similar rating patterns across the set of attributes.

| <b>Factor Analysis: When Voting in a National Election, How Much Influence Will Each of the Following Have on Who You Decide to Vote For?</b> |                                      |                   |                 |               |
|---|--------------------------------------|-------------------|-----------------|---------------|
|   | Social and Financial Security Minded | Social Protectors | Problem Solvers | Roe v. Waders |
| State of the U.S. economy   | 0.75                                 | 0.30              | 0.21            | -0.01         |
| Business and finance issues   | 0.70                                 | -0.06             | 0.53            | 0.00          |
| Global war and terrorism  | 0.69                                 | 0.21              | -0.07           | 0.25          |
| Crime   | 0.64                                 | 0.25              | 0.12            | 0.33          |
| Energy prices   | 0.58                                 | 0.44              | 0.19            | 0.04          |
| Social Security or medicare reform  | 0.56                                 | 0.54              | 0.04            | 0.11          |
| Healthcare (access, quality, insurance)   | 0.35                                 | 0.78              | 0.10            | 0.07          |
| Environmental issues  | 0.13                                 | 0.68              | 0.39            | 0.11          |
| Quality of public education   | 0.24                                 | 0.66              | 0.18            | 0.22          |
| Science and technology issues   | 0.17                                 | 0.23              | 0.79            | 0.15          |
| Diet, health and nutrition  | 0.06                                 | 0.43              | 0.58            | 0.22          |
| Abortion issues   | 0.00                                 | 0.15              | 0.11            | 0.82          |
| Gun rights/control  | 0.33                                 | 0.08              | 0.16            | 0.71          |

Our technique identifies four distinct clusters or segments of consumers. Each is defined according to issues that they, as a group, place more emphasis on than others. These Issues Segments are as follows:

- "Social and Financial Security Minded" (24% of respondents) are most concerned with issues relating to both national and financial security. The variation in ratings across all of the attributes from highest to lowest is greater for this segment as well, meaning they care deeply about some issues and not very much about others. They rate the following attributes higher than others do:
  - Global war on terrorism
  - State of the US economy
  - Social Security or Medicare reform
  - Energy prices
  - Crime
  - Business and finance issues
  - Gun rights/control
- "Social Protectors" (24% of respondents) emphasize healthcare as their single most important issue. However, they also care more about the environment as

well as other social issues like education and social security than others seem to. They award relatively higher scores to the following attributes:

- Healthcare
  - Social Security or Medicare reform
  - Quality of public education
  - Environmental issues
- 
- “Problem Solvers” (28% of respondents) are distinguished from other segments by a pattern reflecting the least amount of variation from highest to lowest. This suggests that they care about all issues, no single issue or set of issues defines them. It also means that they tend to place relatively more weight on issues that are at or near the bottom of the list for others. Further, they seem to have faith in the ability of our modern society to solve problems through science, technology and medicine. Their differentiating issues include:
    - Science and technology issues
    - Diet, health and nutrition
- 
- “Roe v. Waders” (24% of respondents) care a lot about the global war on terrorism. However, what sets them apart from other consumers are just two specific issues, which appear to carry significantly more weight with them vs. others. These include:
    - Abortion issues (as influential as terrorism)
    - Gun rights/gun control

**When Voting in a National Election, How Much Influence Will Each of the Following Have on Who You Decide to Vote For?**

Top 2 Box (6 7) Percentages

|   | Social and Financial Security Minded | Social Protectors | Problem Solvers | Roe v. Waders |
|---|--------------------------------------|-------------------|-----------------|---------------|
| Global war and terrorism                | 91.1%                                | 69.2%             | 54.6%           | 77.7%         |
| State of the U.S. economy               | 86.2%                                | 60.9%             | 59.5%           | 48.6%         |
| Social Security or medicare reform      | 66.6%                                | 67.1%             | 42.4%           | 46.2%         |
| Healthcare (access, quality, insurance) | 65.0%                                | 89.9%             | 55.9%           | 57.1%         |
| Business and finance issues             | 62.5%                                | 10.1%             | 50.3%           | 21.3%         |
| Energy prices                           | 62.3%                                | 53.7%             | 44.7%           | 35.9%         |
| Crime                                   | 57.5%                                | 33.3%             | 34.6%           | 45.1%         |
| Quality of public education             | 43.4%                                | 71.5%             | 48.2%           | 51.6%         |
| Environmental issues                    | 32.5%                                | 67.8%             | 55.4%           | 41.1%         |
| Gun rights/control                      | 29.7%                                | 15.6%             | 26.7%           | 54.5%         |
| Abortion issues                         | 16.3%                                | 25.9%             | 28.5%           | 75.2%         |
| Science and technology issues           | 14.3%                                | 16.1%             | 51.8%           | 18.7%         |
| Diet, health and nutrition              | 5.3%                                 | 18.0%             | 30.4%           | 12.3%         |

### Issues and Quality of life

Respondents were also asked to rate how much influence each of these 13 issues have on their quality of life. In general, quality of life influence closely parallels the perceived influence that these issues have on voting decisions. This provides evidence that consumers are likely to vote for candidates and issues that they perceive as directly impacting their lives rather than basing their vote on abstract principals that they don't perceive as directly affecting them.

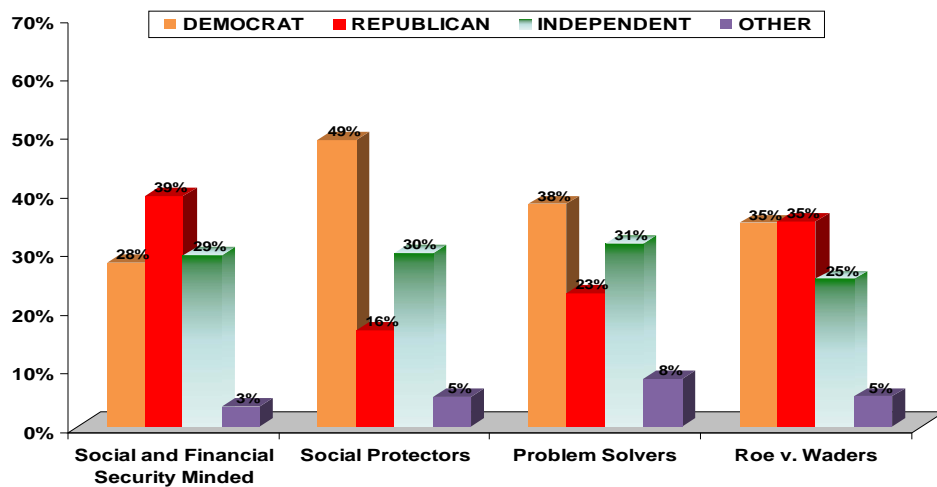
### Issues Segments Vs. Political Parties and Voting Patterns

Importantly, and somewhat surprisingly, consumers are not strongly differentiated on these issues based on what political party they identify themselves with. It is true that Social Protectors and Problem Solvers skew democratic and Social and Financial Security Minded and Roe v. Waders skew Republican. However, there are plenty of self-identified democrats who fall into the Social and Financial Security Minded and Roe v. Waders segments. Further, Independents are similarly represented in each of the segments. Thus, we cannot assume that all of the members of either political party feel the same way about the issues. In fact, there appear to be more similarities than differences. What this means is that particular candidates have both opportunities to win over voters by focusing more on issues than the party line as well as vulnerabilities to losing voters by focusing too much on the party line and not enough on the issues voters care about.

On specific issues, there is only moderate differentiation between party members and independents. Democrats appear to be more concerned with the greatest range of issues; Republicans less so. Interestingly, the one issue with the greatest difference

between Democrats and Republicans is on the environment (average ratings for Democrats and republicans are 5.7 and 4.5, respectively).

At present, consumers do not appear to strongly associate any of the leading Democratic or Republican candidates with any particular set of issues either. The likelihood of voting for any Democratic or Republican candidate in each party's primary is very similar across the influence segments.



# Attitudes Towards Government And Individual Responsibility

## Government's Role

Respondents were asked whether they agreed or disagreed with 10 specific statements regarding the role of government in people's lives. In general, fewer than two-thirds of the respondents were in agreement with any single statement, suggesting that most Americans welcome at least some role for the government in their personal lives.

Overall, three of these statements met with agreement by at least half of the respondents. These included:

- Government should not censor speech, press, media or Internet
- Military service should be voluntary
- There should be no laws regarding sex between consenting adults

Close to half of the respondents were also in agreement with two additional statements:

- End corporate welfare
- Cut taxes and government spending by 50% or more

The remaining statements met with agreement by one-fourth or fewer of the respondents. These speak to both areas that they want the government to stay out of and areas where most deem government oversight to be necessary. They include:

- Let people control their own retirement/privatize Social security
- There should be no national ID card
- End government barriers to international and free trade
- Replace government welfare with private charity
- Repeal laws prohibiting adult possession and use of drugs

There is a fair degree of differentiation on agreement with these statements by political party. Not surprisingly, Republicans generally tend to see a smaller role for government while Democrats see a larger one. Three areas where Republicans are more likely than Democrats to agree with a particular statement are cutting taxes, privatizing Social Security and substituting private charity for welfare.

A similar, though weaker pattern is evident when comparing attitudes about the role of government across the issues segments. Social and Financial Security Minded consumers and Roe v. Waders exhibit a pattern similar to that of Republicans while Social Protectors and Problem Solvers are most similar in their attitudes with the Democrats.

### **Personal Responsibility**

Respondents also rated their agreement with eight statements about each individual's role in society. Regardless of political beliefs or their opinions on the issues, most respondents are in agreement about what their responsibilities as individuals are.

Nearly all agreed that:

- It is each person's duty to do the best they can
- I feel very bad when I fail to do a job I promised to do

At least half agreed that:

- Every person should give some of their time for the good of the country
- At school I usually volunteered for special projects.

Very few (less than 10%) agreed that:

- Letting your friends down is not so bad because you can't do good all the time for everybody
- It is no use worrying about current events because I can't do anything about them anyway
- Our country would be a lot better off if we didn't have so many elections and people didn't have to vote so often
- People would be better off if they could live far away from other people and never have anything to do with them.

Opinions about these individual responsibility statements do not substantively differ across political party affiliation of issues segments.

| <b>Please Rate Your Agreement With The Following Statements?</b>  |   |                          |                        |                      |
|---|---|--------------------------|------------------------|----------------------|
| <b>Top 2 Box (6 7) Percentages</b>  |   |                          |                        |                      |
|   | <b>Social and Financial Security Minded</b> | <b>Social Protectors</b> | <b>Problem Solvers</b> | <b>Roe v. Waders</b> |
| I strongly support the need for regulating on carbon emissions from cars, factories and power plants                          | 56.1%                                       | 75.7%                    | 62.5%                  | 58.6%                |
| Carbon emissions from automobiles contribute to global warming  | 53.0%                                       | 74.5%                    | 61.7%                  | 55.6%                |
| American consumers are not doing everything they can to reduce their impact on global warming                                 | 50.8%                                       | 72.3%                    | 59.7%                  | 55.5%                |
| I am concerned about global warming and its impact on the Environment   | 46.4%                                       | 72.7%                    | 58.7%                  | 50.9%                |
| I would do more to reduce my impact on global warming, if it were easier to take steps to do so                               | 45.0%                                       | 64.0%                    | 51.4%                  | 47.6%                |
| I am concerned about global warming and its impact on me and/or my loved ones   | 43.8%                                       | 68.8%                    | 54.9%                  | 47.1%                |
| I would like to know more about ways I could reduce my impact on global warming   | 40.2%                                       | 63.3%                    | 50.2%                  | 44.9%                |
| Global warming has strong scientific evidence behind it   | 37.2%                                       | 62.6%                    | 52.0%                  | 44.2%                |
| I can make a real difference by buying ecofriendly products and conserving energy   | 37.0%                                       | 58.6%                    | 46.5%                  | 41.4%                |
| Household consumption of electricity contributes to global warming  | 32.0%                                       | 51.6%                    | 45.1%                  | 36.5%                |
| The media is placing too much emphasis on global warming  | 30.8%                                       | 10.7%                    | 17.0%                  | 27.2%                |
| Politicians are placing an appropriate amount of attention on global warming  | 12.6%                                       | 10.5%                    | 11.8%                  | 11.6%                |
| Most people in the U.S. are knowledgeable about what behaviors and products they do and use that contribute to global warming | 9.4%  | 9.4%                     | 10.4%                  | 7.9%                 |

## Environmental Attitudes and Behaviors

### Importance of Environmental Issues

Given the attention it receives in the media, it is not surprising that global warming is top of mind for many consumers. Respondents were asked to identify which of eight environmental issues are especially important to them. Four of these issues were designated especially important by roughly half of the respondents. These include:

- Global warming and climate change
- Air pollution
- Resource depletion
- Water pollution

Other environmental issues appear to be much less important to consumers. The remainder was selected as especially important by one-fourth or fewer of the respondents:

- Overpopulation
- Deforestation
- Toxic waste sites
- Endangered species

| <b>Which Of The Following Environmental Issues Are Especially Important To You And Your Family?</b> |   |                          |                        |                      |
|---|---|--------------------------|------------------------|----------------------|
| <b>Percentages</b>  |   |                          |                        |                      |
|   | <b>Social and Financial Security Minded</b> | <b>Social Protectors</b> | <b>Problem Solvers</b> | <b>Roe v. Waders</b> |
| Global warming and climate change   | 47.5%                                       | 69.7%                    | 62.1%                  | 51.1%                |
| Air pollution / acid rain / air quality /smog   | 55.6%                                       | 49.8%                    | 50.3%                  | 52.5%                |
| Resource depletion (e.g., of trees, fish, minerals other natural resources)                         | 43.1%                                       | 51.0%                    | 47.1%                  | 44.7%                |
| Water pollution / oil spills / water quality  | 51.9%                                       | 42.7%                    | 42.7%                  | 47.5%                |
| Overpopulation / congestion / open spaces   | 31.0%                                       | 25.5%                    | 29.8%                  | 28.4%                |
| Deforestation (reduction in forests/rain forest)  | 16.7%                                       | 22.6%                    | 21.2%                  | 20.4%                |
| Toxic waste sites / Nuclear power waste disposal  | 20.1%                                       | 13.6%                    | 15.4%                  | 18.6%                |
| Endangered animal species   | 9.7%  | 14.6%                    | 13.4%                  | 15.5%                |

Comparison of the importance of these environmental issues by political party and issues segment suggest that many consumers remain skeptical of global warming. In fact, both Republicans and, to a lesser extent, those in the Social and Financial Security Minded segment are much less likely than others to name global warming as especially important to them. Instead, they are somewhat more inclined than others to identify air and water pollution as especially important environmental issues. There appears to be a broad consensus on the relative importance of other environmental issues across both party affiliation and issues segments.

### **Eco-Friendly Purchasing and Behavior**

The extent to which awareness and concern about the environment is translating into actual action among consumers is moderate at this time. Further, when it comes to environmentally friendly action, either in terms of buying eco-friendly products or altering their lifestyle to be more environmentally friendly, consumers appear to be more similar than they are different.

Respondents report some purchasing of eco-friendly durable goods and certain services, but the majority has yet to do so in any single category. Among the different categories queried, eco-friendly home improvement items were the most commonly purchased (23%), closely followed by home appliances (20%). The most popular eco-

friendly home improvement items included lighting fixtures/lamps and lawn/landscaping services. For home appliances, washer/dryers, vacuum cleaners and refrigerator/freezers were the eco-friendly products being purchased most often.

Two other eco-friendly categories mentioned by roughly one out of ten respondents included computers/communications and electronics. Relatively few of our respondents said they have purchased any eco-friendly travel services, vehicles, financial services or homes.

Purchasing of these eco-friendly products appears to be largely similar across political party affiliation and issues segments.

Consumers are somewhat more inclined to engage in environmentally relevant behaviors vs. going out and purchasing eco-friendly products. Asked to rate how often they practice 17 different environmentally friendly behaviors, virtually all mentioned doing one or more of these at least some of the time. In fact, more than half claimed they always set their water heater to a lower temperature and/or recycle cans, bottles and newspapers.

Other behaviors practiced with at least some frequency (always by at least a third or always/sometimes by at least two-thirds) include:

- Drink water from re-usable containers
- Boycott products from companies with poor environmental reputations
- Limit use of water in your home
- Replace traditional incandescent light bulbs with compact fluorescent ones
- Use grocery bags you can re-use
- Use environmentally sensitive building materials
- Turn off computer and computer monitor when not in use

There are also a series of environmentally friendly behaviors that consumers are practicing with less frequency. These include:

- Avoid using chemicals on lawn/garden
- Use group mass transportation
- Work for a company with a good reputation on environmental issues
- Do volunteer work or donate to a group that helps the environment

- Go out of your way to buy products from companies with good environmental reputations (which corresponds to the relatively low frequency of purchasing eco-friendly products.)
- Get a home energy audit

Again, there do not appear to be any substantive differences in performing any of these behaviors across political affiliations or issues segments.

| <b>Which Of The Following Do You Do?</b>   |   |                          |                        |                      |
|--|---|--------------------------|------------------------|----------------------|
| <b>Percentages</b>   |   |                          |                        |                      |
|  | <b>Social and Financial Security Minded</b> | <b>Social Protectors</b> | <b>Problem Solvers</b> | <b>Roe v. Waders</b> |
| Set household water heater to a lower temperature  | 66.5%                                       | 68.2%                    | 61.9%                  | 64.4%                |
| Recycle cans, bottles and/ or newspapers   | 57.5%                                       | 61.3%                    | 57.7%                  | 58.1%                |
| Drink water from reusable containers or glasses rather than disposable plastic bottles                     | 33.8%                                       | 36.9%                    | 34.6%                  | 33.4%                |
| Use grocery store bags you can re-use  | 33.3%                                       | 33.7%                    | 31.2%                  | 28.4%                |
| Limit the use of water in your home, lawn and/ or garden   | 32.0%                                       | 35.4%                    | 32.6%                  | 30.6%                |
| Replace traditional incandescent light bulbs with compact florescent ones                                  | 32.0%                                       | 35.4%                    | 32.6%                  | 30.6%                |
| Boycott products of companies with poor environmental reputations  | 32.0%                                       | 35.4%                    | 32.6%                  | 30.6%                |
| Turn off computer and computer monitor when not in use   | 27.1%                                       | 31.1%                    | 30.6%                  | 27.8%                |
| Used environmentally sensitive building materials(e.g., FSC certified wood, granite or recycled materials) | 26.9%                                       | 33.9%                    | 32.2%                  | 26.7%                |
| Avoid using chemicals in your yard/ garden   | 18.7%                                       | 28.6%                    | 24.5%                  | 21.4%                |
| Buy electricity from a utility that uses renewable resources   | 12.8%                                       | 14.1%                    | 14.2%                  | 12.3%                |
| Turn off lights whenever leaving a room  | 11.9%                                       | 11.5%                    | 13.8%                  | 10.6%                |
| Often use group mass transportation (e.g., train, bus) or walk or car pool rather than driving alone       | 7.4%  | 11.9%                    | 12.5%                  | 10.9%                |
| Work for a company with a good reputation on environmental issues  | 5.8%  | 10.0%                    | 11.2%                  | 7.0%                 |
| Do volunteer work for or donate to a group that helps the environment                                      | 5.8%  | 8.8%                     | 10.4%                  | 7.2%                 |
| Get a home energy audit  | 5.7%  | 5.1%                     | 7.2%                   | 4.8%                 |
| Go out of your way to buy products from companies with good environmental reputations                      | 5.0%  | 9.1%                     | 9.2%                   | 6.5%                 |

## Opinions About Global Warming and The Environment

The skepticism that consumers have about global warming is evidenced by the fact that, overall, just under two-thirds agree that it is real and primarily caused by human activity. The remainder is about evenly split between the belief that global warming is real but part of the natural planetary trend and those that are not really sure if it is real or what might be causing it. A handful does believe that global warming is not real.

Despite many similarities in their environmental behaviors, beliefs about global warming are one area where consumers diverge widely. Among Democrats and members of the Social Protector segment, more than three-fourths believe that global warming is real

and caused by human activity. Similarly, two out of three Problem Solvers hold this belief. In contrast, only about one-third of the Republicans and roughly half of those in the Social Protector and Roe v. Wade segments share in this belief about global warming.

Consumers attitudes towards global warming and the environment, as well as the way those attitudes diverge, in the way they rate their agreement with 13 statements covering various aspects of this issue. There appears to be agreement as to the causes and effects of global warming; most attributes earn average ratings between 5 and 6 on the seven-point rating scale. However, none of the attributes scores higher than six, indicating that a broad consensus about global warming does not exist.

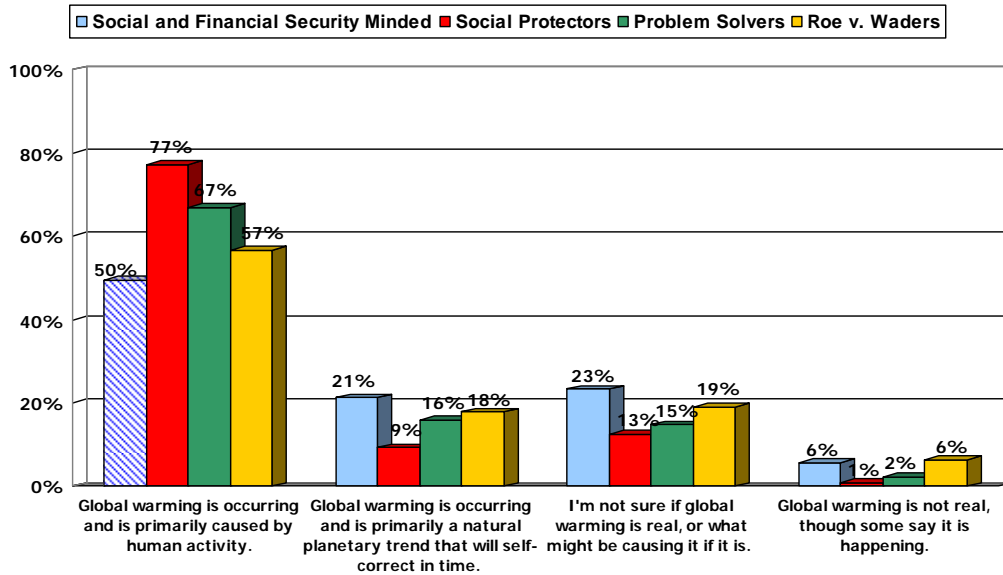
There are three statements with which there is widespread disagreement from respondents. These earn average ratings between 3 and 4 on the seven-point scale and provide a glimpse into consumers' differing opinions about this issue. They include:

- The media is placing too much emphasis on global warming
- Politicians are placing an appropriate amount of emphasis on global warming
- Most people in the US are knowledgeable about what behaviors and products they do and use that contribute to global warming

Opinions about global warming appear to fall cleanly along party and segment lines. Except for the three low rated statements (mentioned in the preceding paragraph), Democrats and members of the Social Protector segment are most likely to agree with each statement while republicans and members of the Social and Financial Security Minded segment are least likely to agree. At the same time, Republicans and Social and Financial Security Minded members are relatively more than others to agree that there is too much media emphasis on global warming and that politicians are giving it sufficient attention. Independents and members of the Problem Solver and Roe v. Wade segments tend to fall somewhere between these extremes.

## Which Of The Following Statements Do You Agree With The Most?

Percentages



Consumer attitudes towards global warming and the environment, as well as the way those attitudes diverge by segment, are detailed in the way they rate their agreement with 13 statements covering various aspects of the issue. The three statements below practically define Social Protectors' global warming beliefs:

- I strongly support the need for regulating on carbon emissions from cars, factories and power plants.
- Carbon emissions from automobiles contribute to global warming.
- American consumers are not doing everything they can to reduce their impact on global warming

There is one statement which the Social and Financial Security Minded segment rates far higher than the other segments:

- The media is placing too much emphasis on global warming

Opinions about global warming appear to fall cleanly along party and segment lines. Except for the three lowest-rated statements, Democrats and members of the Social Protector segment are most likely to agree with each statement while Republicans and

members of the Security Minded segment are least likely to agree. At the same time, Republicans and Security Minded members are relatively more likely than others to agree that there is too much media emphasis on global warming and that politicians are giving it sufficient attention. Independents and members of the Problem Solver and Roe v. Wade segments tend to fall somewhere between these extremes.

When asked who should take a leading role, again, the Social and Financial Security Minded and Social Protectors express different opinions, while Problem Solvers and Roe v. Waders fall in the middle.

## Consumer Behavior and The Environment

Consumer attitudes towards global warming and the environment, as well as the way those attitudes diverge by segment, are detailed in the way they rate their agreement with 13 statements covering various aspects of the issue. The three statements below practically define Social Protectors' global warming beliefs:

- I strongly support the need for regulating on carbon emissions from cars, factories and power plants.
- Carbon emissions from automobiles contribute to global warming.
- American consumers are not doing everything they can to reduce their impact on global warming

| Please Rate Your Agreement With The Following Statements?   |                                      |                   |                 |               |
|---|--------------------------------------|-------------------|-----------------|---------------|
| Top 2 Box (6 7) Percentages   |                                      |                   |                 |               |
|   | Social and Financial Security Minded | Social Protectors | Problem Solvers | Roe v. Waders |
| I strongly support the need for regulating on carbon emissions from cars, factories and power plants                          | 56.1%                                | 75.7%             | 62.5%           | 58.6%         |
| Carbon emissions from automobiles contribute to global warming  | 53.0%                                | 74.5%             | 61.7%           | 55.6%         |
| American consumers are not doing everything they can to reduce their impact on global warming                                 | 50.8%                                | 72.3%             | 59.7%           | 55.5%         |
| I am concerned about global warming and its impact on the Environment   | 46.4%                                | 72.7%             | 58.7%           | 50.9%         |
| I would do more to reduce my impact on global warming, if it were easier to take steps to do so                               | 45.0%                                | 64.0%             | 51.4%           | 47.6%         |
| I am concerned about global warming and its impact on me and/or my loved ones   | 43.8%                                | 68.8%             | 54.9%           | 47.1%         |
| I would like to know more about ways I could reduce my impact on global warming   | 40.2%                                | 63.3%             | 50.2%           | 44.9%         |
| Global warming has strong scientific evidence behind it   | 37.2%                                | 62.6%             | 52.0%           | 44.2%         |
| I can make a real difference by buying ecofriendly products and conserving energy   | 37.0%                                | 58.6%             | 46.5%           | 41.4%         |
| Household consumption of electricity contributes to global warming  | 32.0%                                | 51.6%             | 45.1%           | 36.5%         |
| The media is placing too much emphasis on global warming  | 30.8%                                | 10.7%             | 17.0%           | 27.2%         |
| Politicians are placing an appropriate amount of attention on global warming  | 12.6%                                | 10.5%             | 11.8%           | 11.6%         |
| Most people in the U.S. are knowledgeable about what behaviors and products they do and use that contribute to global warming | 9.4%                                 | 9.4%              | 10.4%           | 7.9%          |

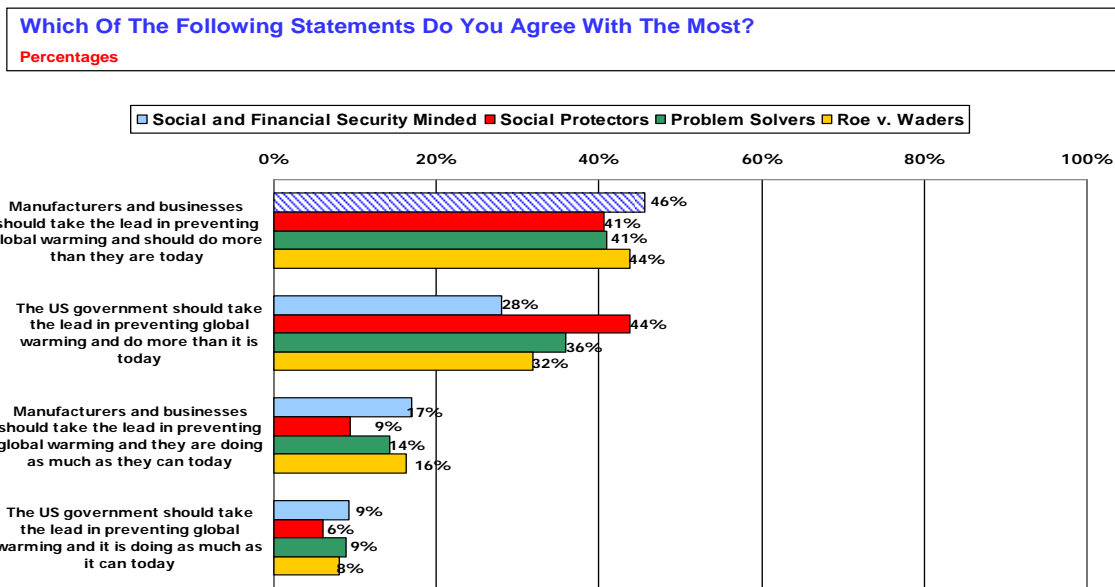
There is one statement which the Social and Financial Security Minded segment rates far higher than the other segments:

- The media is placing too much emphasis on global warming

### Government Action and The Environment

Opinions about global warming appear to fall cleanly along party and segment lines. Except for the three lowest-rated statements, Democrats and members of the Social Protector segment are most likely to agree with each statement while Republicans and members of the Security Minded segment are least likely to agree. At the same time, Republicans and Security Minded members are relatively more likely than others to agree that there is too much media emphasis on global warming and that politicians are giving it sufficient attention. Independents and members of the Problem Solver and Roe v. Wade segments tend to fall somewhere between these extremes.

When asked who should take a leading role, again, the Social and Financial Security Minded and Social Protectors express different opinions, while Problem Solvers and Roe v. Waders fall in the middle.



## Media Behaviors

### Where Do Consumers Get Their News From

Consumers appear to obtain their local and national news in different ways. For local news, local daily newspapers and broadcast TV are the most commonly used sources information (mentioned by 62% and 53%, respectively). Many also rely on cable TV (44%), traditional radio (43%) and The Internet (41%). Relatively few reported using any other sources for local news, such as satellite TV and radio or magazines.

#### *Local News*

|  | Social and Financial Security Minded | Social Protectors | Problem Solvers | Roe v. Waders |
|--|--------------------------------------|-------------------|-----------------|---------------|
| Local daily newspaper                      | 66.3%                                | 61.7%             | 60.1%           | 60.0%         |
| Broadcast TV                               | 54.6%                                | 52.9%             | 50.6%           | 53.4%         |
| Cable TV                                   | 47.6%                                | 43.2%             | 44.1%           | 41.7%         |
| Traditional radio ("over the air")         | 45.3%                                | 42.5%             | 41.0%           | 43.3%         |
| Internet news websites                     | 37.9%                                | 41.5%             | 42.3%           | 40.9%         |
| Satellite TV                               | 15.7%                                | 14.0%             | 14.4%           | 13.9%         |
| National daily newspaper (e.g., USA Today) | 8.1%                                 | 7.2%              | 9.8%            | 7.4%          |
| A weekly magazine                          | 7.0%                                 | 6.5%              | 8.8%            | 7.0%          |
| A monthly magazine                         | 5.2%                                 | 4.8%              | 7.6%            | 5.2%          |
| Internet radio                             | 4.1%                                 | 4.2%              | 6.6%            | 4.2%          |
| Satellite radio (e.g., XM, Sirius)         | 4.0%                                 | 3.0%              | 5.4%            | 3.4%          |
| Other                                      | 3.9%                                 | 4.3%              | 7.1%            | 5.1%          |

### *National News*

When it comes to national news, Internet news web sites and cable TV appear to be the preferred sources. These were mentioned by 58% and 54%, respectively. Other national news sources mentioned by a significant number of respondents included broadcast TV (41%), local daily newspapers (39%) and traditional radio. Again, satellite media and magazines, as well as national daily newspapers (i.e., USA Today) are not being used for national news to any great degree.

|  | Social and Financial Security Minded | Social Protectors | Problem Solvers | Roe v. Waders |
|--|--------------------------------------|-------------------|-----------------|---------------|
| Internet news websites                     | 55.0%                                | 58.9%             | 57.8%           | 59.0%         |
| Cable TV                                   | 59.2%                                | 52.7%             | 52.0%           | 51.1%         |
| Broadcast TV                               | 42.9%                                | 41.5%             | 39.0%           | 41.0%         |
| Local daily newspaper                      | 41.9%                                | 38.2%             | 38.2%           | 37.4%         |
| Traditional radio ("over the air")         | 34.2%                                | 33.8%             | 33.3%           | 34.9%         |
| A weekly magazine                          | 17.1%                                | 18.2%             | 20.0%           | 16.9%         |
| Satellite TV                               | 20.2%                                | 17.0%             | 17.6%           | 17.1%         |
| National daily newspaper (e.g., USA Today) | 17.8%                                | 15.6%             | 19.3%           | 14.7%         |
| A monthly magazine                         | 12.2%                                | 12.9%             | 15.1%           | 12.3%         |
| Satellite radio (e.g., XM, Sirius)         | 8.1%                                 | 5.6%              | 7.7%            | 5.9%          |
| Internet radio                             | 5.5%                                 | 5.6%              | 8.4%            | 5.5%          |
| Other                                      | 4.5%                                 | 4.6%              | 7.5%            | 5.5%          |

Regardless of party affiliation or segment membership, consumers appear to place similar reliance on each of these media sources.

### **Internet Usage**

Consumers reported spending an average of between four and five hours a week using The Internet. This varies slightly by political party affiliation, with Democrats averaging 4.6 hours online and Republicans spending 4.1 hours online. Similarly, Internet usage varies by issues segment, ranging from a high of 4.7 hours per week among the Problem Solvers to a low of 4.2 hours per week among the Social Protectors and Roe v. Waders.

Most (84%) of consumers are accessing The Internet with a desktop computer. About half (51%) mentioned using a laptop to go online. Other devices, such as cell phones, PDAs, etc. are rarely used for this purpose. Those in the Problem Solver Segment use devices other than desktops slightly more often than other consumers.

The Internet has clearly become a nearly universal media among consumers and they are performing a variety of different activities online. In fact, there were several activities that more than half of the respondents claimed they did just within the last 30 days. These included:

- Sending/receiving e-mail (nearly all – 96% - of the respondents in our sample said they did this in the past 30 days)
- Obtaining the latest news/current events
- Paid bills
- Made purchases for personal use

In addition to these, most common Internet activities, at least one-fourth of the respondents claimed they recently did one or more of 11 other web-based activities, ranging from obtaining financial information and/or tracking investments to playing games and/or watching videos.

Internet activities which few (less than 10%) consumers are engaging in include things like on-line gambling, obtaining childcare information, online dating, visiting chat rooms, making phone calls and writing a blog

While there were few substantive differences in the variety of recent Internet activities by political party affiliation, the pattern of activities tends to differ by issues segment. In particular, those in the Social and Financial Security Minded segment appear to be most likely to use The Internet for “serious” tasks such as obtaining financial information, tracking investments and making travel plans, as well as obtaining sports news. In contrast, the Social Protectors are seem to be relatively more inclined to engage in online leisure activities such as watching videos or visiting TV and movie websites, looking up recipes, playing video games and instant messaging.

|   | Social and Financial Security Minded | Social Protectors | Problem Solvers | Roe v. Waders |
|---|--------------------------------------|-------------------|-----------------|---------------|
| Sent/Received e-mail                    | 96.6%                                | 97.2%             | 93.8%           | 97.2%         |
| Obtained the latest news/Current events | 69.0%                                | 70.8%             | 66.8%           | 70.5%         |
| Paid bills online                       | 63.9%                                | 64.1%             | 62.1%           | 63.4%         |
| Made a purchase for personal use        | 54.4%                                | 56.3%             | 55.4%           | 57.3%         |
| Obtained financial information          | 46.4%                                | 38.3%             | 42.6%           | 41.2%         |
| Made personal or business travel plans  | 38.3%                                | 31.9%             | 34.9%           | 34.4%         |
| Obtained sports news/Information        | 40.7%                                | 30.2%             | 33.7%           | 32.2%         |
| Used instant messenger/IM               | 27.8%                                | 33.7%             | 33.3%           | 33.2%         |
| Looked for recipes                      | 27.2%                                | 36.4%             | 29.5%           | 33.6%         |
| Watched an online video                 | 26.4%                                | 32.1%             | 31.8%           | 31.7%         |

Respondents reported frequenting a startling array of Internet web sites in the past 30 days. However, while no single site has recently been visited by more than half of the respondents, there are some web sites that are far more popular than others. Even among this group, it is apparent that consumers are using The Internet in a variety of ways. Leading sites include those used for e-mail, travel and weather, entertainment and general information.

Sites that have been visited within the past 30 days by one-third to one-half of the respondents include the following:

- Weather.com
- Yahoo! Mail
- MapQuest
- Amazon
- Ebay
- Wikipedia

Several other sites have been recently visited by at least one out of four respondents. These include:

- MSN Hotmail
- YouTube
- Expedia
- MySpace

Interestingly, differences in web site usage across political party affiliation and issues segment are not large. However, there are several sites that Republicans and members of the Social and Financial Security Minded segment tend to visit less often than others. These include:

- Amazon
- Wikipedia
- YouTube
- MySpace
- CNN.com
- Gmail

## Demographics

### Demographics Overall and By Political Party Affiliation

Overall, our sample includes slightly more females (56%) than males (44%). However, Democrats include relatively higher proportions of women while Republicans and, to a lesser extent, Independents, are split almost evenly by gender.

The vast majority (91%) of our respondents have had at least some college experience. However, they are roughly evenly divided among those who have less than a four year degree (33%), have earned their bachelors' degree (34%) or have a post graduate degree (25%). This pattern is fairly consistent across Democrats, Republicans and Independents.

Approximately two out of three respondents (68%) of the respondents are employed in some capacity. The largest number (53%) is employed full-time and the remainder either work part time or are self-employed. This does not vary by political party affiliation.

Respondents reported an average household income of almost \$62,000. Further, the sample was almost evenly divided by those who earn under \$40,000, \$40,000 to less than \$75,000 and more than \$75,000. Republicans reported higher average household incomes (more than \$67,000) than either Democrats or Independents (each group averaged just under \$61,000).

Our sample also breaks fairly evenly into three age groups. Overall, 34% of the respondents are 18-35 years, 35% are 36-55 years and 31% are older than 55. Democrats tend to skew younger, with 40% being 35 or younger vs. just 29% of Republicans and Independents in this age range. In contrast, just 26% of Democrats are older than 55 vs. 37% of the Republicans and 35% of the Independents.

Marriage is an important institution to the respondents in our sample. Exactly half (50%) of the respondents are married, although this varied from 62% of Republicans to just 41% of Democrats. On average, these respondents have been married for just over 20 years. Among unmarried respondents, nearly a quarter (22%) said they are planning to get married in the near future.

There were few single person households in our sample; just 23% of respondents said they live alone. This included 27% of Democrats (not surprising because they skew younger) and 19% of Republicans. Overall, the average household size was 2.4, and this was only marginally greater among the Republicans. However, just one-fourth (25%) of all respondents mentioned any children or teens under the age of 18 living in their household and this was consistent across party affiliations.

Almost two out of three (63%) respondents said they own their own home. Homeownership ranged from 71% among Republicans to 58% among Democrats.

Minorities may be underrepresented in our sample, as just 9% identified themselves as being of Hispanic or Latin origin and 7% identified themselves as black or African American. Democrats included slightly higher proportions of these ethnic groups than was evident among the Republicans.

While 65% of the sample identified themselves as Christian, another 17% described themselves as "non-religious or secular." The next largest religious affiliation, Jewish, accounted for just 4% of the sample. Republicans were more likely to identify themselves as Christian and less likely to identify themselves as secular vs. other respondents.

### **Demographics By Issues Segments**

It appears that members of the Social and Financial Security Minded segment have the most distinct demographic profile of the four. In contrast, the other three segments are generally more similar than different to each other in terms of their demographic characteristics.

Members of the Social and Financial Security Minded and Problem Solver segments are skewed male, the former includes 55% men and the latter 50%. In contrast, there are fewer males in the Problem Solver (33%) and Roe v. Wader (36%) segments.

All four of the issues segments have similar education levels. Employment status is similar across the segments as well, although the Social and Financial Security Minded segment includes slightly more retirees. This is consistent with the fact that the Social and Financial Security Minded segment also includes the highest number of older (55+) respondents (41%) and the smallest number of respondents 35 or younger (21%).

The Social and Financial Security Minded members tend to be most affluent, with average household incomes just over \$69,000. The Social Protectors report the lowest average household incomes of all segments, at just under \$56,000. These respondents also report higher levels of home ownership (74%) than others.

Social and Financial Security Minded members are also more likely to be married (59%) than those in other segments and for a slightly longer period of time (23 years). At the same time, their average household size and whether or not there are any household members under 18 are similar to other segments.

While the four issues segments have similar ethnic and racial make-ups, Social and Financial Security Minded members are more likely than the others to identify themselves as Christian (73%).