



CONFIDENTIAL MEMORANDUM

TO: Interested Parties

FROM: Tony Fabrizio

RE: Latest Battleground State Survey Results –
The “Unfriendly” Undecideds

DATE: July 8, 2004

Our analysis of “Undecided” voters in our most recent Battleground State Survey reveals that they are currently poised to break AWAY from President Bush and to John Kerry based on the following findings:

- *They are more than twice as likely to see things headed down the wrong track as compared to voters overall.*

	Overall	3 Way Undecideds
Right direction	39.9%	23.5%
Wrong track	51.1	52.9
DK/Refused	9.0	23.5
Net +/-	-11.2	-29.4

- *They give President Bush a net NEGATIVE image rating.*

	Overall	3 Way Undecideds
Favorable	49.7%	30.9%
Unfavorable	44.9	38.2
No Opinion	5.4	30.9
Net +/-	+4.8	-7.4

- *They give President Bush a net NEGATIVE job approval rating.*

	Overall	3 Way Undecideds
Approve	51.6%	39.7%
Disapprove	46.3	45.6
DK/Refused	2.1	14.7
Net +/-	+5.3	-5.9

- *A solid majority sees the Country as being **WORSE OFF** than they were 4 years ago.*

	Overall	3 Way Undecideds
Better Off	29.3%	8.8%
Worse Off	51.0	52.9
Same	16.8	27.9
DK/Refused	2.9	10.3
Net +/-	-21.7	-44.1

- *They are significantly more pessimistic about the current state of the nation's economy.*

	Overall	3 Way Undecideds
Excellent/Good	33.0%	20.6%
Fair/Poor	65.6	72.1
DK/Refused	1.4	7.4
Net +/-	-32.6	-51.5

- *They are significantly more pessimistic about their own current financial condition.*

	Overall	3 Way Undecideds
Excellent/Good	46.0%	30.9%
Fair/Poor	51.6	60.3
DK/Refused	2.4	8.8
Net +/-	-5.6	-29.4

- *They are twice as likely to see the number of jobs in their area as **DECREASING** instead of increasing.*

	Overall	3 Way Undecideds
Number of Jobs Increasing	25.7%	19.1%
Number of Jobs Decreasing	35.9	38.2
Same Number of Jobs	33.2	27.9
DK/Refused	5.2	14.7
Net +/-	-10.2	-19.1

- *They are significantly more likely to favor the federal government doing more as opposed to doing less.*

	Overall	3 Way Undecideds
Fed. Gov't. Do More	43.6%	48.5%
Fed. Gov't. Do Less	41.5	27.9
DK/Refused	14.9	23.5
Net +/-	+2.1	+20.6

- *They are more likely to be pro-choice on the issue of abortion.*

	Overall	3 Way Undecideds
Pro-Choice	48.2	45.6%
Pro-Life	45.2	35.3
DK/Refused	6.6	19.1
Net +/-	+3.0	+10.3

- *They are more likely to have seen or heard advertising critical of President Bush than John Kerry in the past year.*

	Overall	3 Way Undecideds
Advertising critical of Bush	35.4%	35.3%
Advertising critical of Kerry	20.8	10.3
Both (VOL.)	26.9	27.9
Neither (VOL.)	10.6	16.2
Net +/-	+14.6	+25.0

- *John Kerry holds a slight net POSITIVE image rating.*

	Overall	3 Way Undecideds
Favorable	48.4%	32.4%
Unfavorable	38.0	30.9
No Opinion	13.1	36.8
Never Heard of	0.5	--
Net +/-	+10.4	+1.5

Conclusion

Clearly, if these undecided voters were leaning any harder against the door of the Kerry camp, they would crash right through it.

The Bush campaign needs to focus on two goals with these crucial voters – improve their perceptions about the jobs and economy AND more sharply and aggressively define John Kerry. Any advertising that does not either sharply define Kerry or get the truth out about the growing economy appears to be a waste of resources in this environment, an environment in which the President's image is polarized and generally fixed.

If the Bush team can improve these voters' perceptions of the jobs and the economy, it would improve the President's job approval and image ratings. Couple that improvement with a worsening in their view of Kerry and the President can greatly improve his chances of capturing these voters.

Short of accomplishing these two goals or some other significant event, these voters appear poised to break heavily AGAINST President Bush in John Kerry's favor which would hand Kerry a lion's share of these states.

About the Poll

The telephone survey was conducted in the 19 battleground states in which the Bush and Kerry campaigns have focused their paid media efforts to this point. The sample of 1,000 likely Presidential voters was conducted on July 6-7, 2004 and has a margin of error of +/-3.1% at the 95% confidence interval. Respondent selection was at random within predetermined geographic units to reflect actual electoral vote allotment to each state. The battleground states used for the survey were AR, AZ, CO, FL, IA, LA, ME, MI, MN, MO, NH, NM, NV, OH, OR, PA, WA, WI, WV.