



MOMENTUM ANALYSIS



TO: INTERESTED PARTIES

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RE: KEY FINDINGS FROM A SERIES OF FOCUS GROUPS AMONG
WALMART MOMS

DATE: SEPT 17, 2010

On behalf of Walmart, Public Opinion Strategies and Momentum Analysis conducted three focus groups of Walmart Moms (defined as women with children age 18 or younger at home and who shop at Walmart at least once in the past month). The groups were conducted in Montgomeryville, PA; St. Louis, MO; and Denver, CO on September 17, 2010.

OVERVIEW & SUMMARY OBSERVATIONS

As the 2010 elections draw near these focus groups of Walmart Moms (WMM) provide a more in-depth look at a key swing voter group contributing to President Obama's 2008 success. Our polling from May and September this year indicates these women could once again play an important role in the outcome of the 2010 elections. Representing roughly 15%-17% of the electorate, their support could determine the fate of many candidates this fall.

In-depth discussions with small groups of these women across the country reveal just how jaded and fed up these voters are with the politics-as-usual behavior of their elected officials in Washington. They are frustrated with the economy, concerned for their family's welfare and worried about what lies ahead for their children. They are planning to vote this November but have not yet focused on races for either Senate or Congress. These women are undecided and "up-for-grabs."

WALMART MOMS: FRUSTRATED WITH WASHINGTON, UNCOMMITTED & UNDECIDED IN THEIR VOTE THIS FALL

1. ***Although they plan to vote, Walmart Moms are not yet paying close attention to this year's elections.*** Walmart Moms in these groups have surface-level awareness of the candidates running for U.S. Senate in their state this fall. They say it is too soon to tune into the campaigns and learn about the candidates' positions, but come mid-October they will start focusing on the race. As such, Walmart Moms are not yet locked in to voting Republican or Democrat and are still "up-for-grabs."
2. ***These women are feeling personally economically squeezed.*** As many as three-fourths of these Walmart Moms said they had felt the impact of the recession first-hand, from losing jobs to losing their homes. They feel stressed about making ends meet, and specifically mention holding onto their jobs, feeding their families, keeping gas in the car, paying for their kids' education and the declining value of their homes. A few say they have become breadwinners, or co-earners, when their husbands have lost their jobs or seen their businesses suffer.
3. ***This economic struggle is the lens through which these moms view the political climate.*** Once they tune in, these Moms say they want to know the candidates' positions, but they REALLY want to know what the candidates are going to do to make things better for them and their families. The issues they bring up, then, focus on these kitchen table concerns--jobs, housing, mortgage and banking reform, good schools and affordable college tuition.
4. ***In addition, other hot topics in the Washington, DC daily debate were discussed quite differently with these moms.*** Moms were split on health care reform, but were more unsure than anything else about how the bill would unfold. Some mentioned the stimulus as a negative, not because of a concern about deficit spending, but because few had yet to feel a tangible improvement in their quality of life. Even more striking was the lack of heated dialogue on abortion, immigration, gay marriage, or the Tea Party. Corruption, lobbyists, and special interest influence were hardly mentioned. "Earmarks" were not mentioned once.
5. ***These Walmart Moms are skeptical that any of their elected officials are really doing anything to help them.*** These women are jaded by the partisan bickering in Washington, and they are fed up on two major counts: Either Congress does not seem to get much done because they are juvenile and cannot find compromise; or, Congress seems to be continually taking from them all the time - taking away tax credits, raising taxes or imposing unforeseen consequences of the new health care legislation - adding to their already elevated economic stress.

6. ***They view their elected officials as out-of-touch and unconcerned about their constituents' needs.*** Walmart Moms' view their representatives in Washington as elitist, with many earning \$250,000 per year and coming from privileged backgrounds. As such they see them as completely unaware of the struggle "ordinary" people like them face each day. As one Philadelphia woman put it, "come live with me and my family for a year and understand what it takes..." to get through life. Her colleagues around the room (and in the other two groups) vigorously agree with this idea, but the group has little faith that even if that happened, politicians still wouldn't "get it."

The disconnect between Washington politicians and these women voters is vast. Walmart Moms clearly don't believe their elected officials listen to them and believe they have been forgotten by the "self-serving" policy-makers.

PRESIDENT OBAMA GETS A PASS FROM WALMART MOMS

7. ***WMM are pessimistic about the direction of the country, telling us they feel "disgusted" with the state of the economy, that we are in a "in a rut" and a state of "disrepair."*** Yet, several of these women recognize some tepid improvement from two years ago. Few think the economy is worse than two years ago, but most are struggling with the lack of obvious positive movement.

Despite their pessimism about the direction of the country, Walmart Moms do not blame President Obama. Several Moms say they "feel sorry for him" because a single person cannot be expected to "fix everything" that is wrong in the country right now. Even Republican Moms who voted for McCain and find Obama's policies "scary," are not inclined to direct their ire at the President. A consistent theme among these women is that Obama "is doing the best he can" under very difficult circumstances, and expectations were set too high when he came into office.

8. ***Instead, Walmart Moms point the finger at banks and back at themselves.*** These women - particularly in Montgomeryville, PA - are serious about personal responsibility. When asked who is to blame for our economic woes many say "we are" and proceed with mea culpa stories of spending too much and saving too little. One woman describes how she had to cut up her credit cards six years ago to get things under control. Second in the firing line is banks. There is a clear sense these women are upset and angry about how banks contributed to the near collapse of our economy two years ago.

(As an interesting side note, NONE of the women in either Pennsylvania or Missouri specifically mentioned "government spending" as an issue that concerns them, preferring instead to focus on their anger over the bank bailouts.)

**WALMART MOMS DO NOT VIEW THE 2010 ELECTION
AS ANY DIFFERENT FROM OTHER ELECTIONS**

9. ***Walmart Moms think it makes little difference who controls Congress.*** Although some moms express concerns about whether Democrats continue to hold the majority, or whether Republicans win control in Congress, essentially they think it is of little consequence when it comes to getting the job done. They allocate equal blame to Republicans and Democrats for the partisanship in Washington, DC and think it does not matter who's got control, it's always the same obstructive and uncooperative atmosphere. These voters likened the partisan bickering in Congress to a merry-go-round that never stops. (One woman described Congress as "nibblers" - "they take a good bill and nibble it to death until it's crap.")
10. ***Regardless of who controls Congress, Walmart Moms want to see compromise.*** These women are exasperated by the partisanship they see in Washington. They want their elected officials to assess legislation and policies on merit and not by whether they have been proposed by a Republican or Democratic Member of Congress. They also express a desire for their representatives to stand up and follow their principles, even if it means going against their own party.
11. ***Speaker Pelosi and Minority Leader Boehner are not relevant to these womens' lives.*** While the two may be locked in battle for leadership of the House, Walmart Moms have little sense of who either of them are, never mind who will emerge as Speaker following the November elections. To the extent they know Nancy Pelosi, they associate her somewhat negatively with health care reform legislation. John Boehner, on the other hand is completely unknown to these women.

BOTTOM LINE

Walmart Moms haven't lost hope that things can turn around, but they are extremely doubtful that the country's politicians can lead the way out of the current recession without working together and compromising on a course of action.

For these economically squeezed moms, politics is an after-thought. They are not watching the cable news shows and don't know the names of the DC inside-the-beltway players. They are barely engaged in the Senate campaigns in their states and say they won't start paying attention until the end. Rather, these women are inwardly focused on their families and making difficult decisions on how to make-do without. (One woman commented, "I don't think about the deficit, I think about how we're going to make it through the week.")

These Walmart women seem to be treading water, hoping they can make it through the never-ending recession with their families and homes intact, and looking to support candidates who give them hope that they can actually begin to fix the nation's economy.