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For questions or comments related to this
study, please contact:

Chris Wilson
Partner & CEO
Wilson Perkins Allen Opinion Research
cwilson@w-r-s.com

324 Second St., S.E.
Washington, DC 20003
(o) 202.470.6300

Bernard Whitman
Chief Executive Officer
Whitman Insight Strategies

80 Eighth Ave., Suite 1210
New York, NY 10011
(o) 212.807.7200

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CENTER FOR
ALCOHOL POLICY

Alcohol Regulation Policy National Survey

Conducted March 17 – March 21, 2011

n=1000 Adults

MoE= $\pm 3.1\%$ @ 95% Confidence Interval

Alcohol Regulation: Public Support

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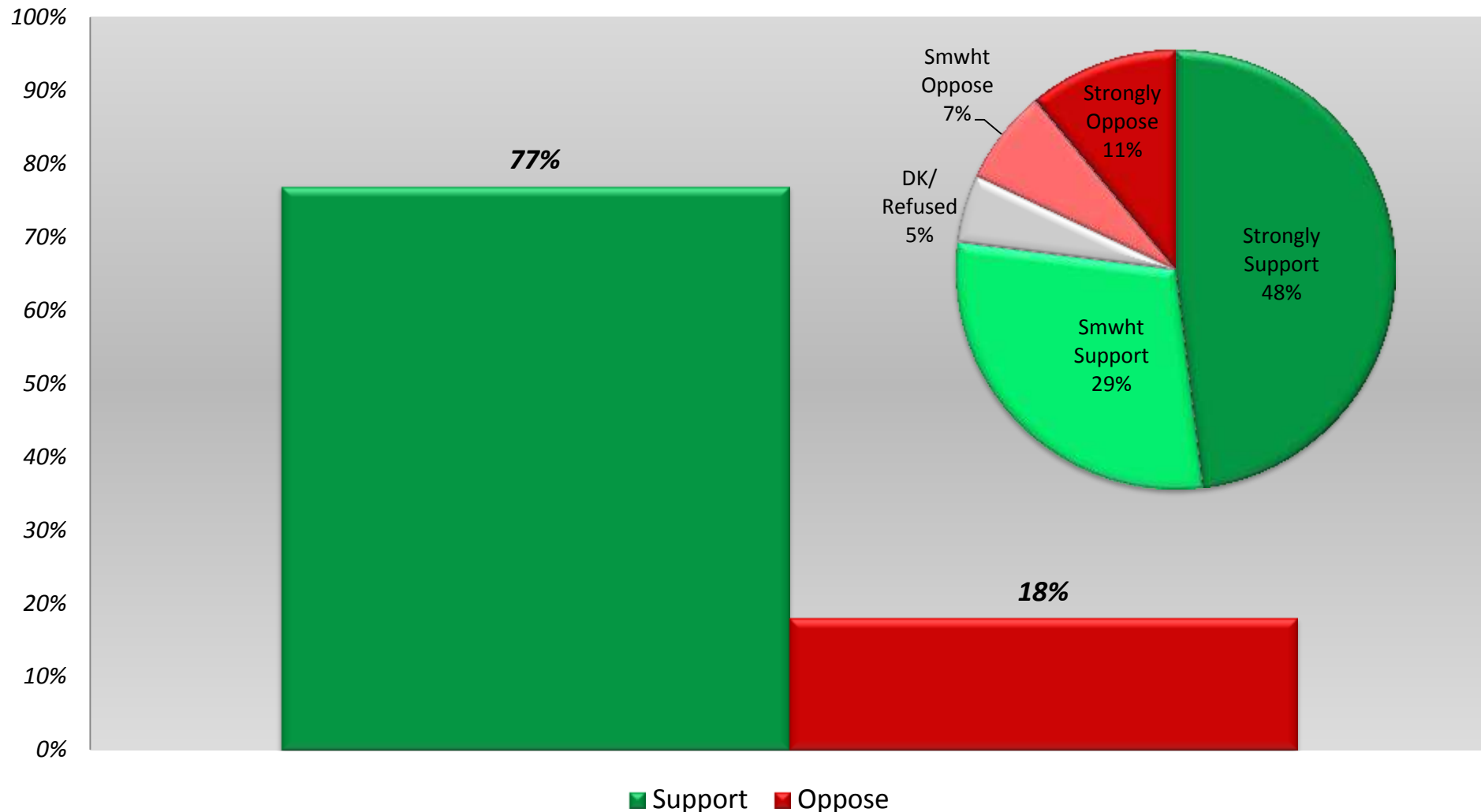
Research Design and Demographic

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Alcohol Regulation: Public Support

Nearly half of adults strongly support a state's right to set its own laws and regulations surrounding the sale of alcohol.

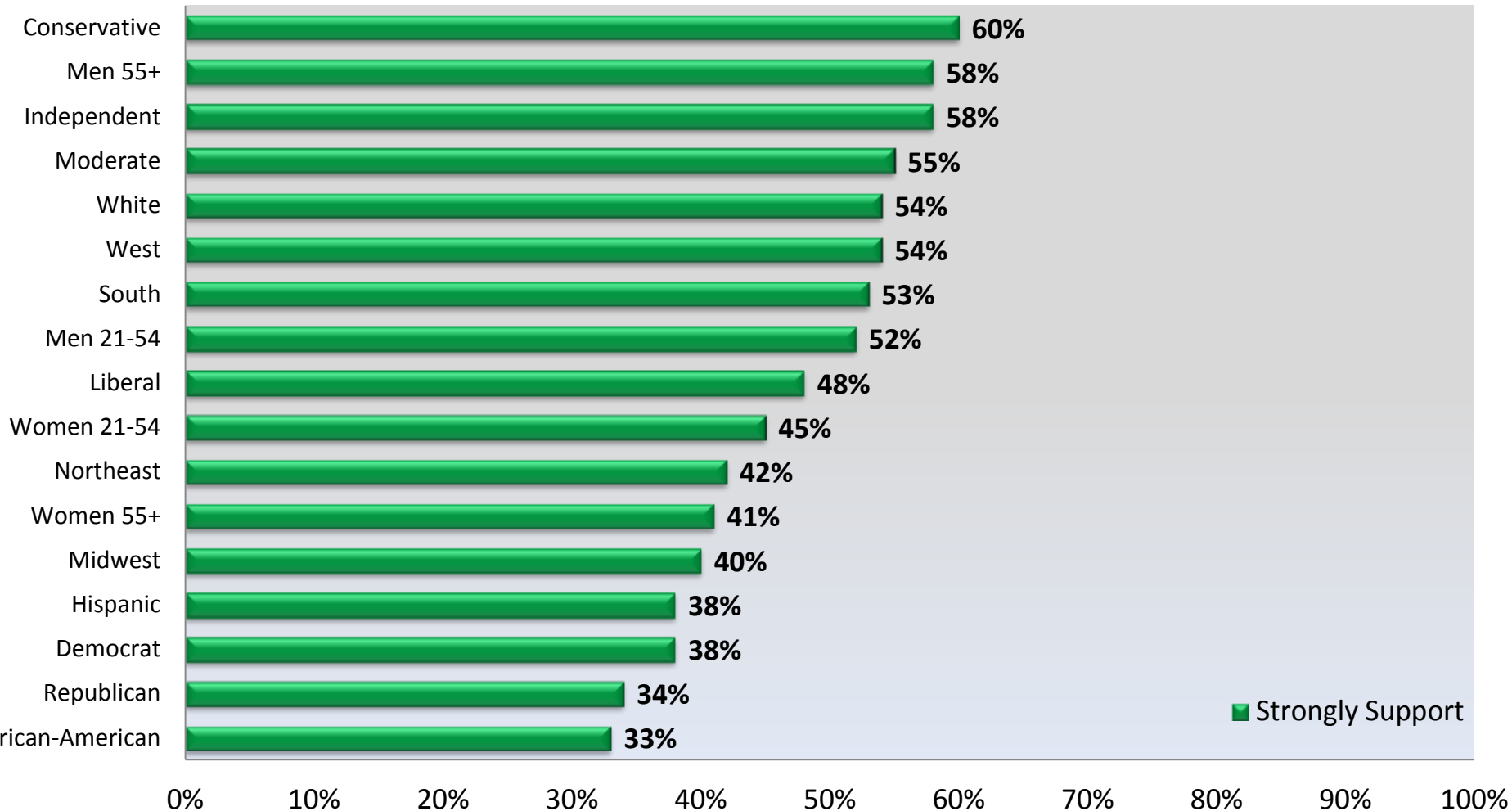
In general, do you support or oppose the right of individual states to set their own laws and regulations surrounding the sale of alcohol?



Majorities of conservatives, older men, independents, and moderates are strong supporters of a state's right to regulate alcohol sales.

Strong Supporters in Each Demographic

Strongly Support



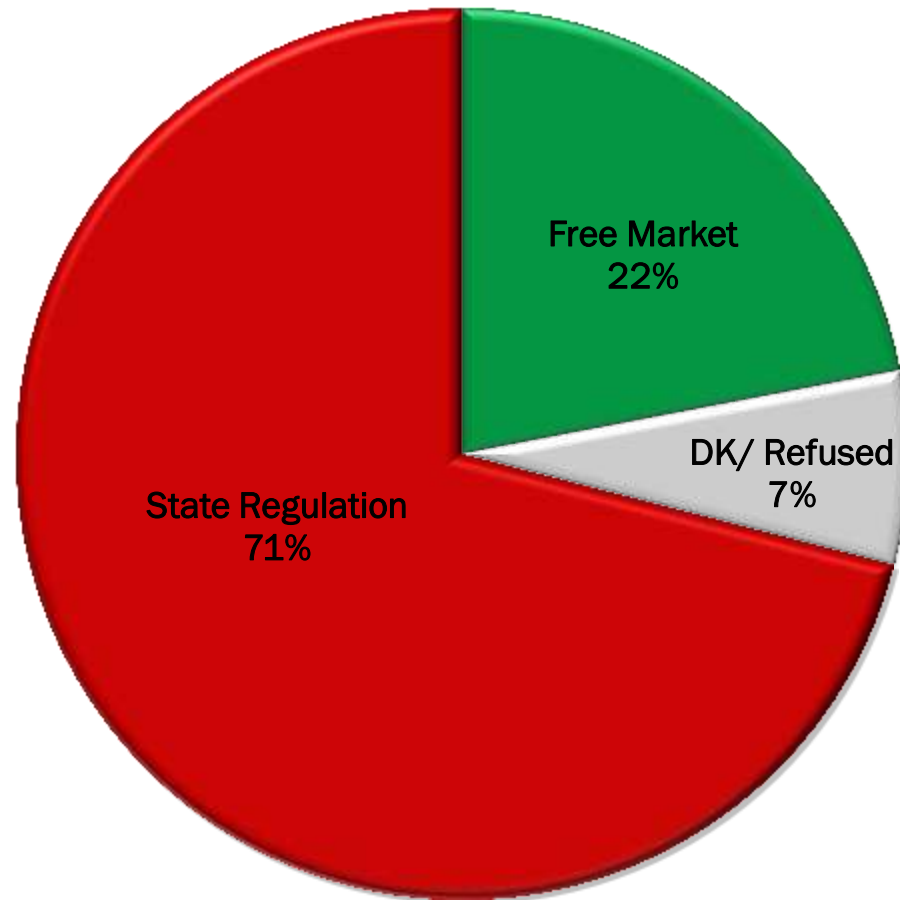
Nearly three-quarters of adults nationwide believe that alcohol is different than other products and needs state regulation.

Thinking specifically about the way states regulate alcohol, which ONE of these positions on alcohol regulations best summarizes your own opinion?

The free market is the best option to regulate any industry including the alcohol industry

Or

Since alcohol is different than other consumer products, it needs a different set of rules and the state should be regulating this industry



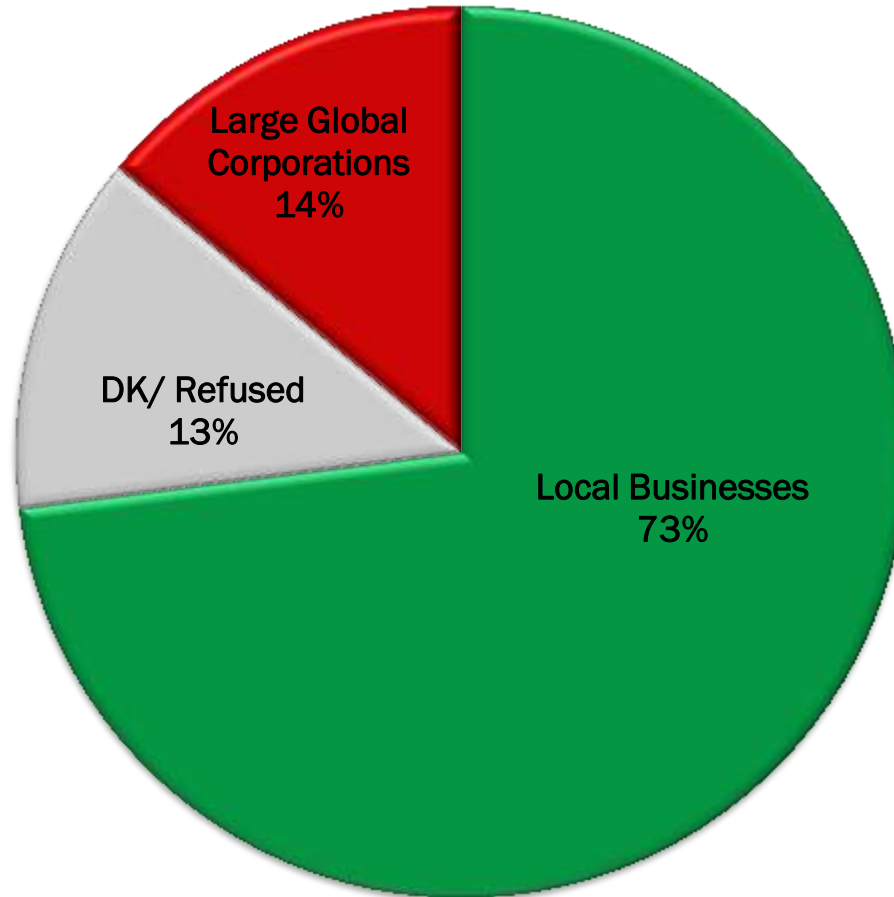
Fewer than one in five adults believe global corporations should be in charge of alcohol distribution. A strong majority of adults want local businesses who will be responsive to their community to handle alcohol distribution.

Thinking specifically about the way alcohol is distributed, which ONE of these positions on alcohol distribution best summarizes your own opinion?

Local businesses should be in charge of alcohol distribution in my community since they better understand the preferences of my community.

Or

Large global corporations should be in charge of alcohol distribution in my community because they can do so cheaper and more efficiently than any other organization.



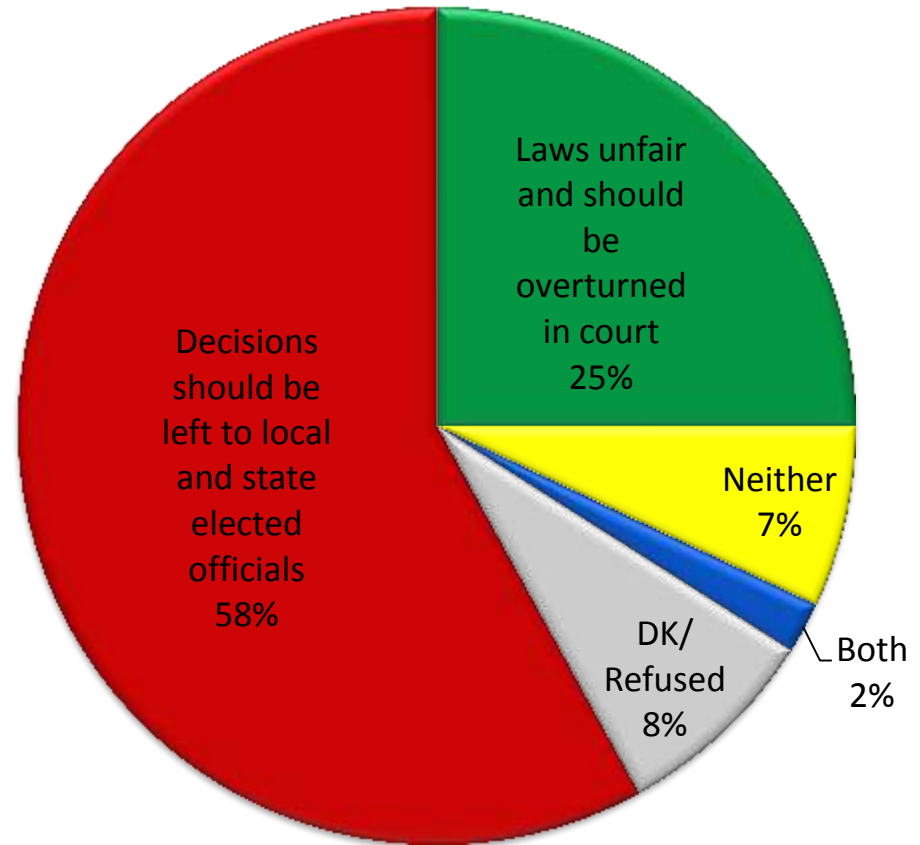
Nearly six in ten adults believe decisions related to purchasing alcohol products from out-of-state should be left to local and state elected officials.

Positions on Ability to Purchase Products from Producers and Retailers Outside of Home State

Some people say that in addition to buying beer, wine, and liquor at a local store, you should be able to purchase alcohol products from out-of-state retailers and have them shipped to your home. They say that the laws that many states have prohibiting this are unfair and should be overturned in court

while

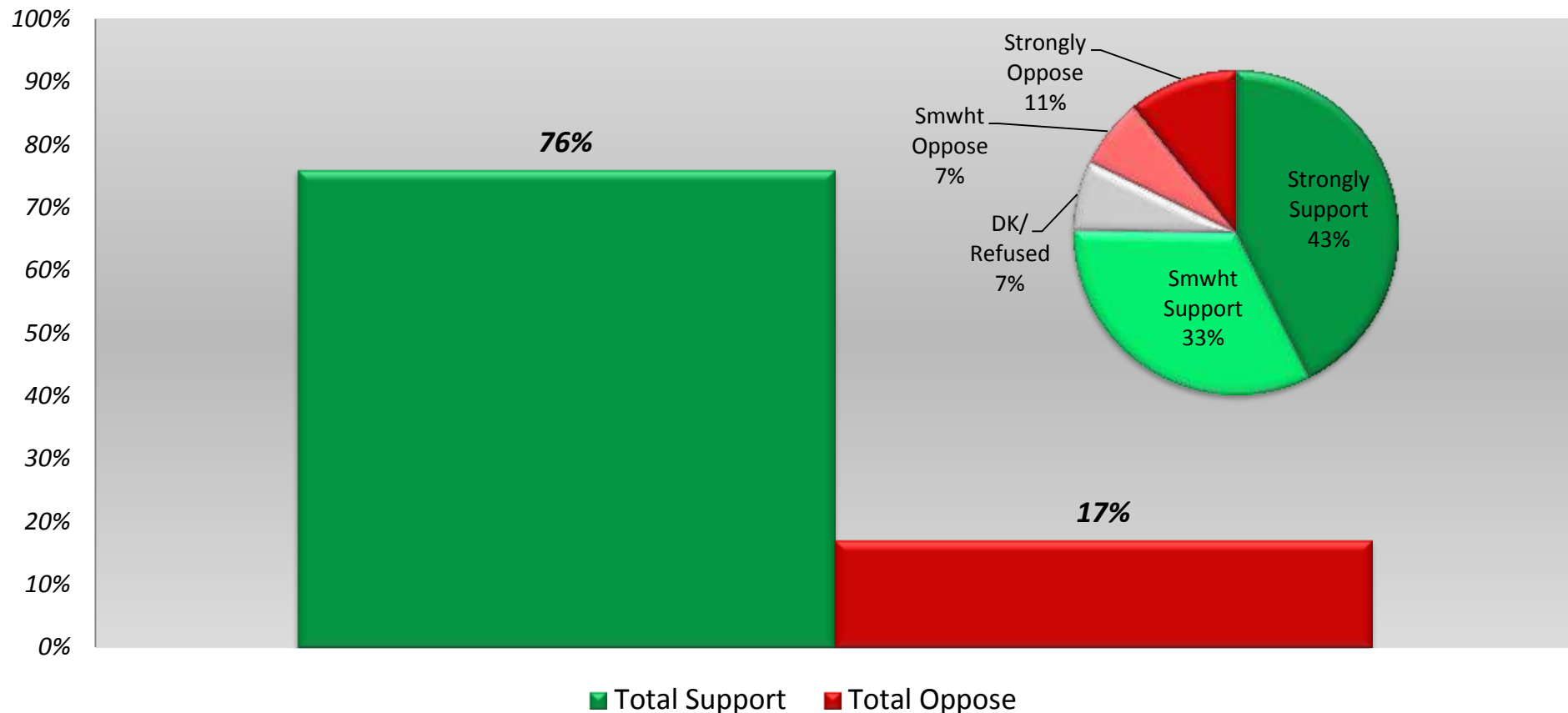
Other people say that while it would be nice to be able to buy beer, wine, or liquor from out-of-state retailers and have it shipped directly to your doorstep, decisions to overturn existing rules and regulations should be made by elected officials and done with the support of the local community rather than in the courts.



More than three-quarters of adults support states' right to set and enforce their own laws regarding alcohol.

As you may know, most states in the U.S. have regulations requiring that producers of beer, wine, or liquor sell their products to licensed local distributors who then sell the beer, wine or liquor to individual retailers such as grocery, liquor, and packaged goods stores.

Thinking about this, do you support or oppose the rights of individual states to set their own laws and regulations that require alcohol to be sold under this system?

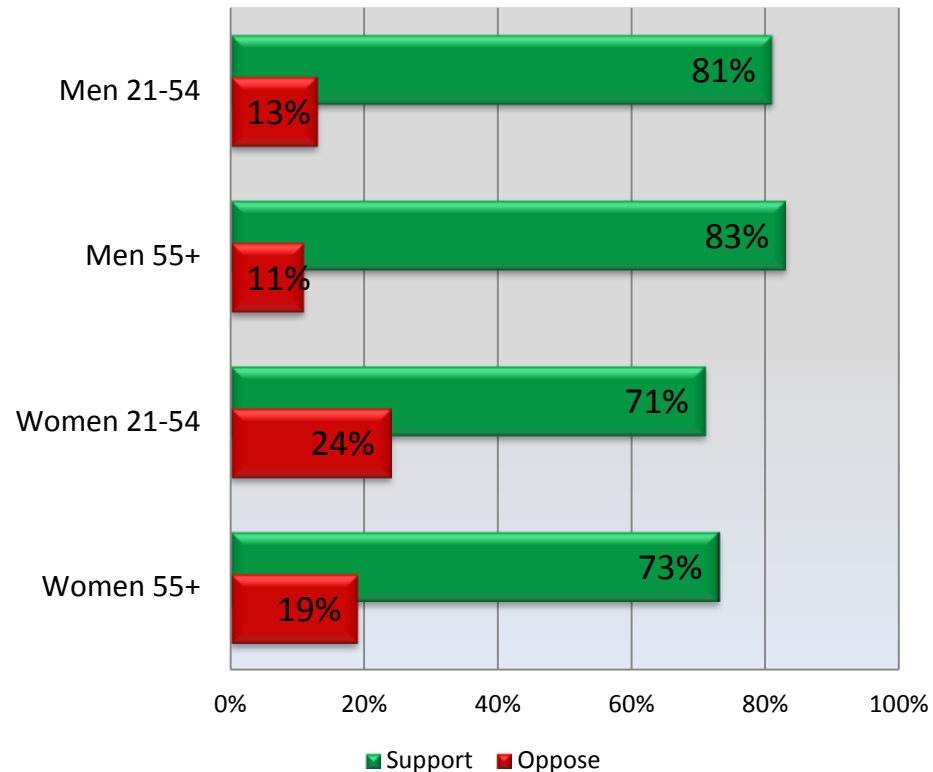


Support for states' right to regulate alcohol is strong across age and gender and across every region of the country. .

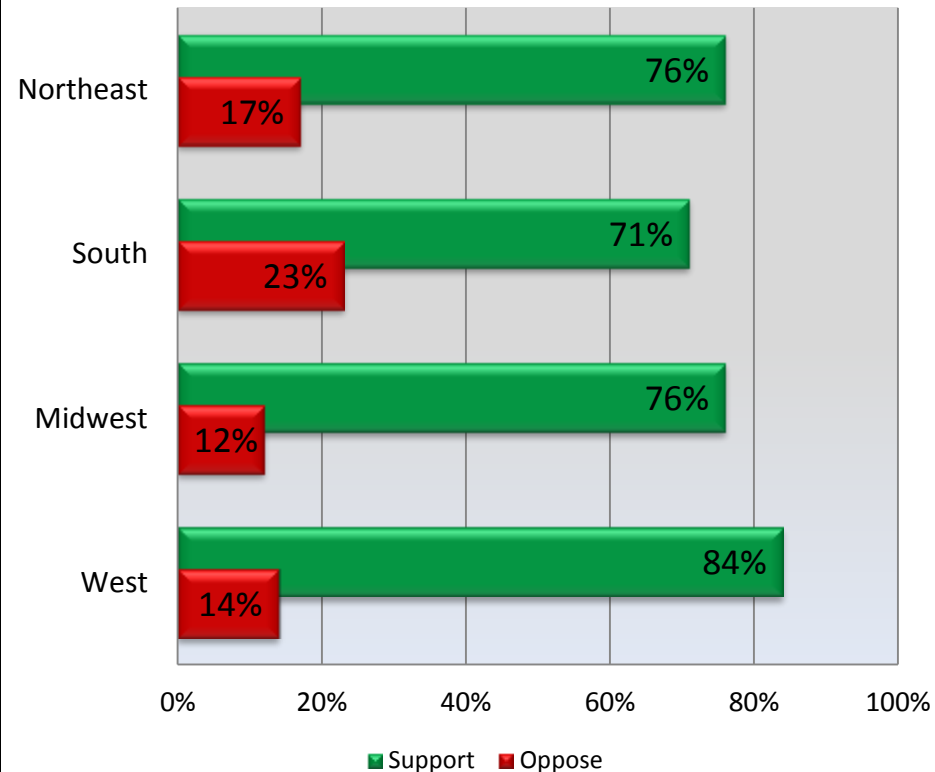
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Gender/ Age



Region

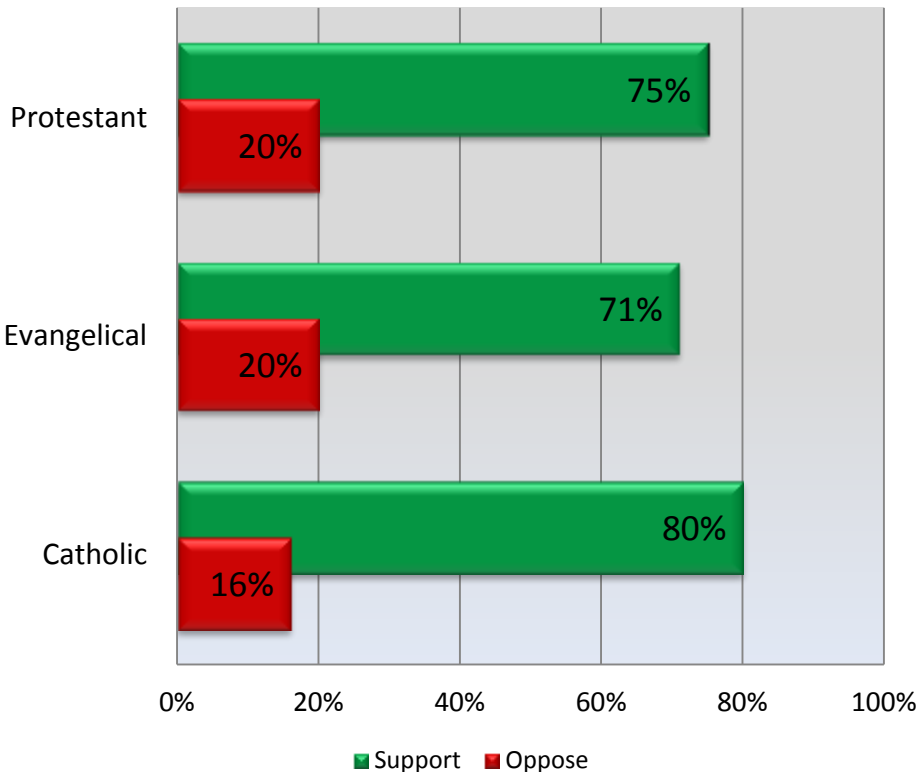


More than seven in ten adults over 21 from each of the three largest religious affiliations, including 80% of Catholics, support the rights of individual states to regulate alcohol. Support is also very strong across ethnic lines.

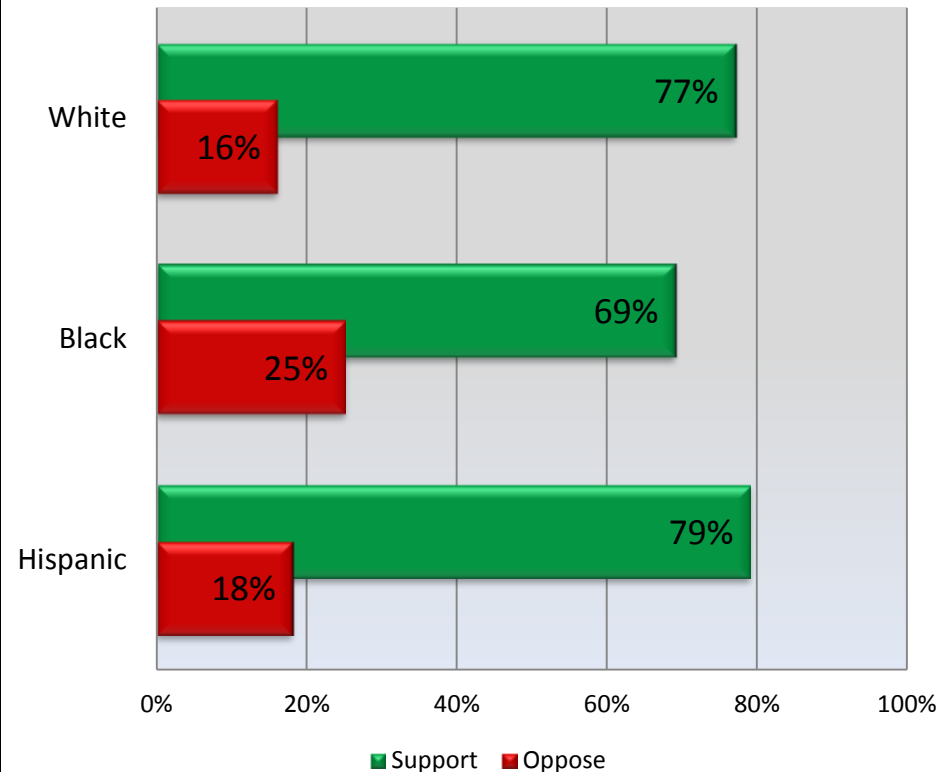
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Religion



Ethnicity

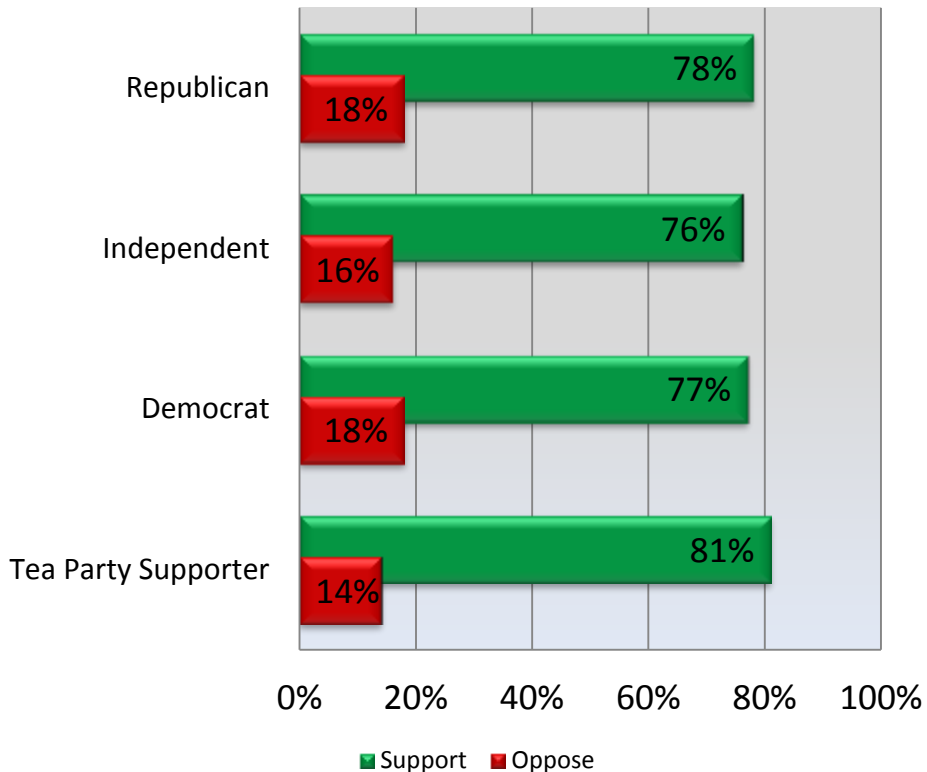


Support for states' right to regulate alcohol crosses party and ideological lines, and there is virtually no difference between Republicans and Democrats on this issue.

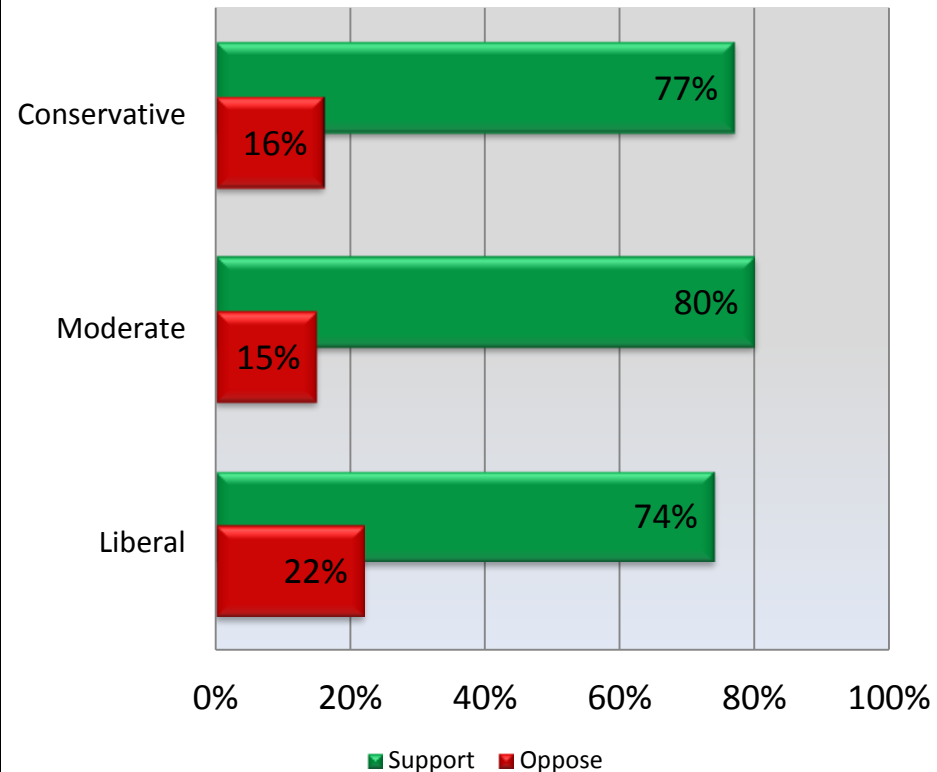
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Thinking about this, do you support or oppose the rights of individual states to set their own laws and regulations that require alcohol to be sold under this system?

Party



Ideology

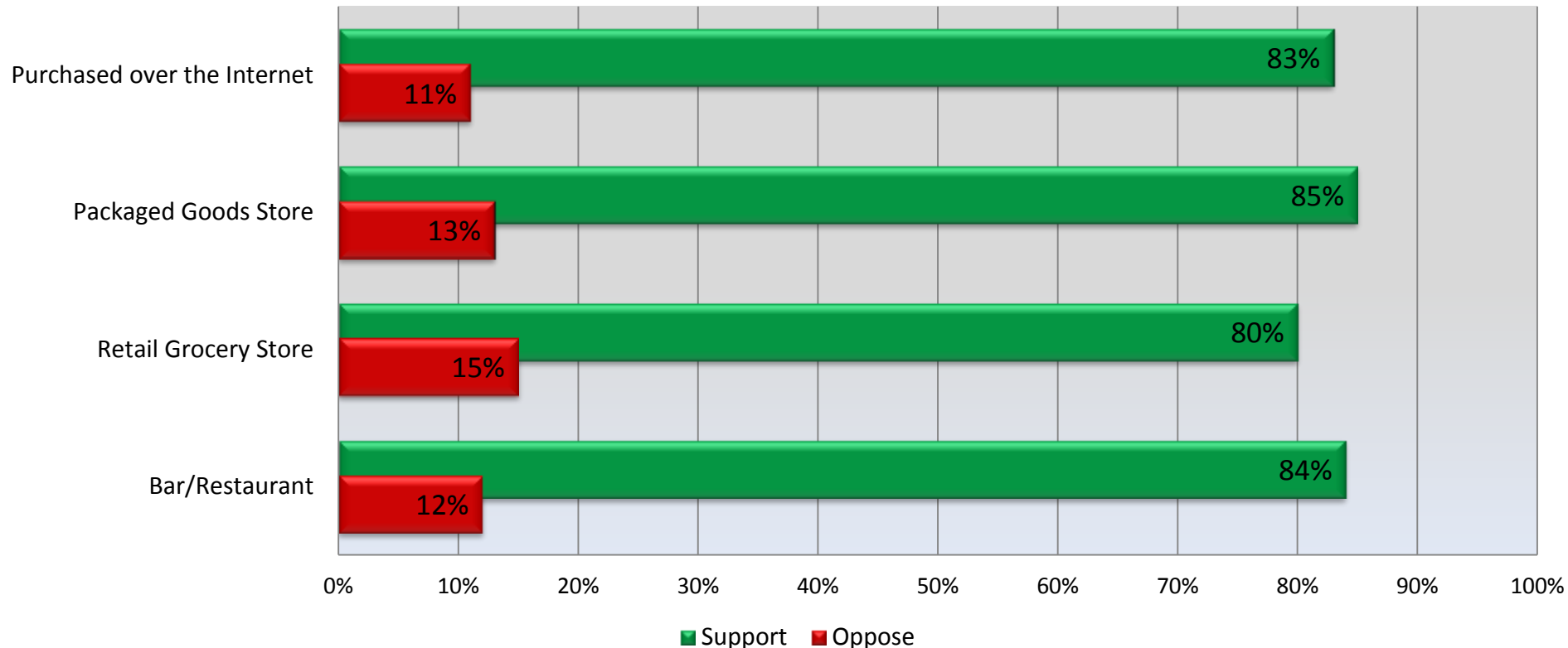


Those who have purchased alcohol over the internet within the last twelve months strongly support states' right to regulate.

As you may know, most states in the U.S. have regulations requiring that producers of beer, wine, or liquor sell their products to licensed local distributors who then sell the beer, wine or liquor to individual retailers such as grocery, liquor, and packaged goods stores.

Thinking about this, do you support or oppose the rights of individual states to set their own laws and regulations that require alcohol to be sold under this system?

Purchased Alcohol in the Last 12 Months from:



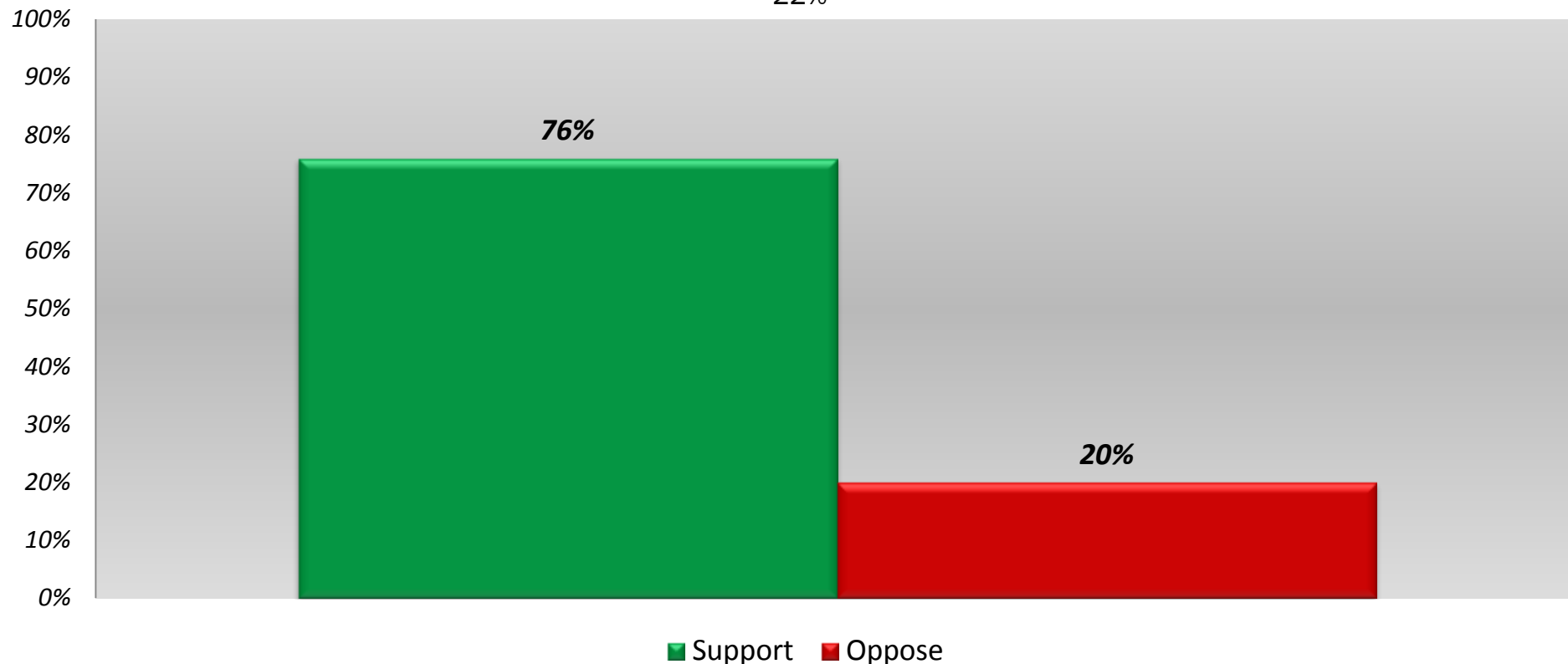
Among those who believe the free market is the best option to regulate all industries including alcohol, more than three-quarters support states' right to regulate alcohol.

As you may know, most states in the U.S. have regulations requiring that producers of beer, wine, or liquor sell their products to licensed local distributors who then sell the beer, wine or liquor to individual retailers such as grocery, liquor, and packaged goods stores.

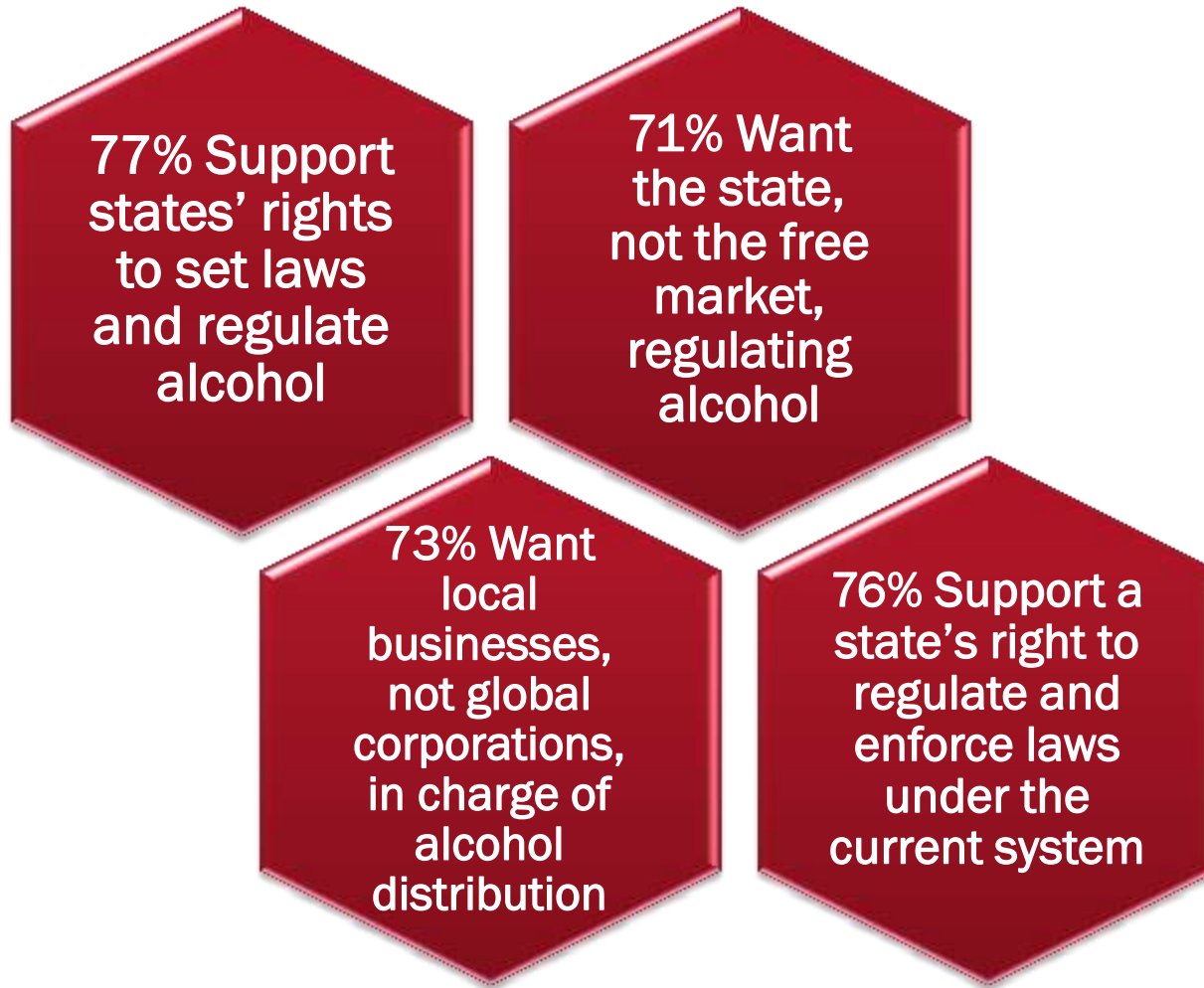
Thinking about this, do you support or oppose the rights of individual states to set their own laws and regulations that require alcohol to be sold under this system?

Among Those Who Believe the Best Option is the Free Market

22%



There is strong support nationwide for the key elements of the current regulatory system.



Alcohol Issues: Values and Impact

The three values on which adults base their opinions regarding alcohol and regulation are:

Choice

- The availability and abundance of alcohol for purchase
- Ensuring regulation does not have a negative effect on consumer options

Safety

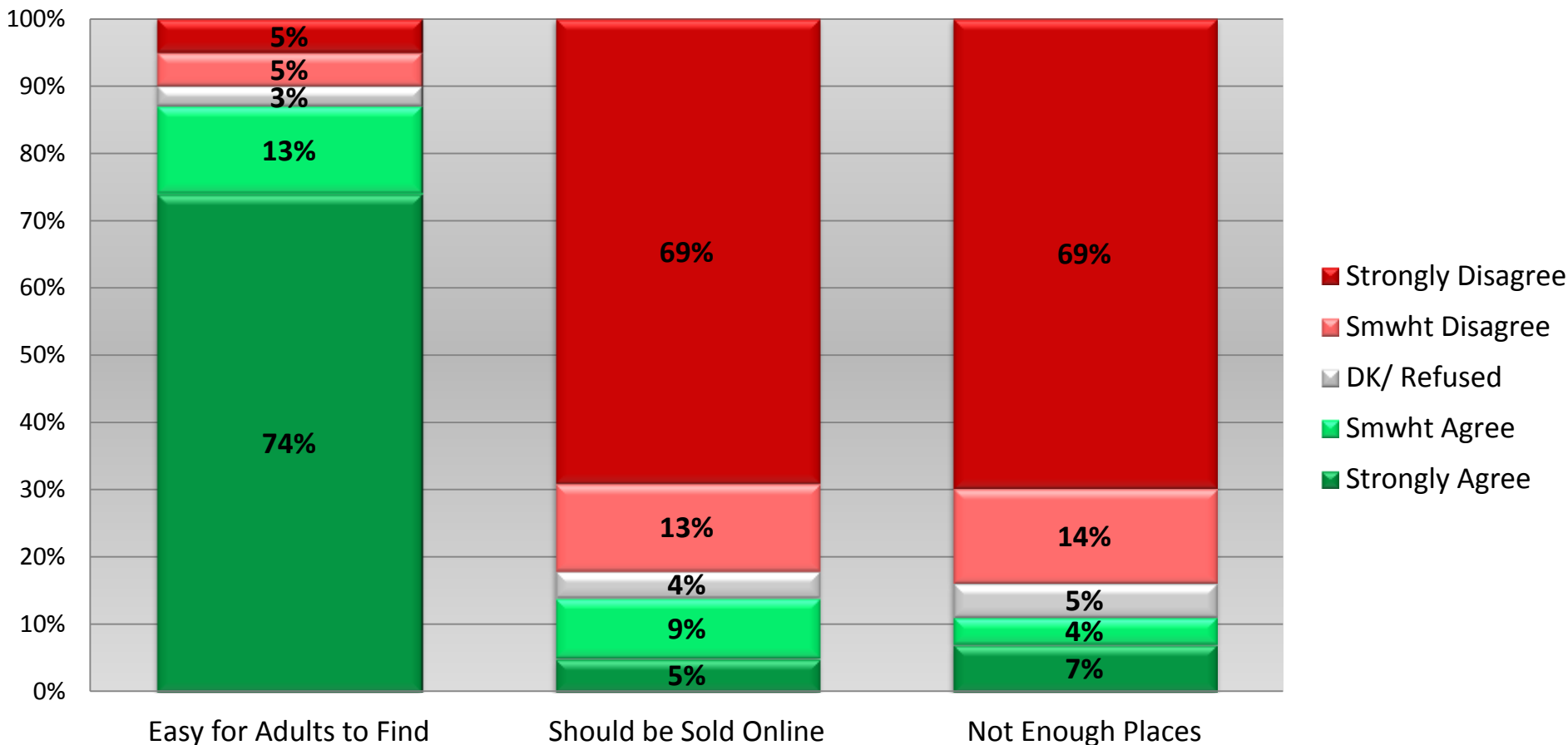
- The benefits and goals of regulation are not only product safety, but to curb irresponsible, dangerous actions- namely, drunk driving and underage drinking

Local Decision Making

- Protecting the public's voice in alcohol regulation
- To ensure the regulations and laws reflect the attitudes and values of the local community, and not those of activist judges or global corporations

More than eight in ten adults nationwide believe that there are plenty of opportunities to purchase alcohol in their communities and do not agree with the notion that more access is necessary.

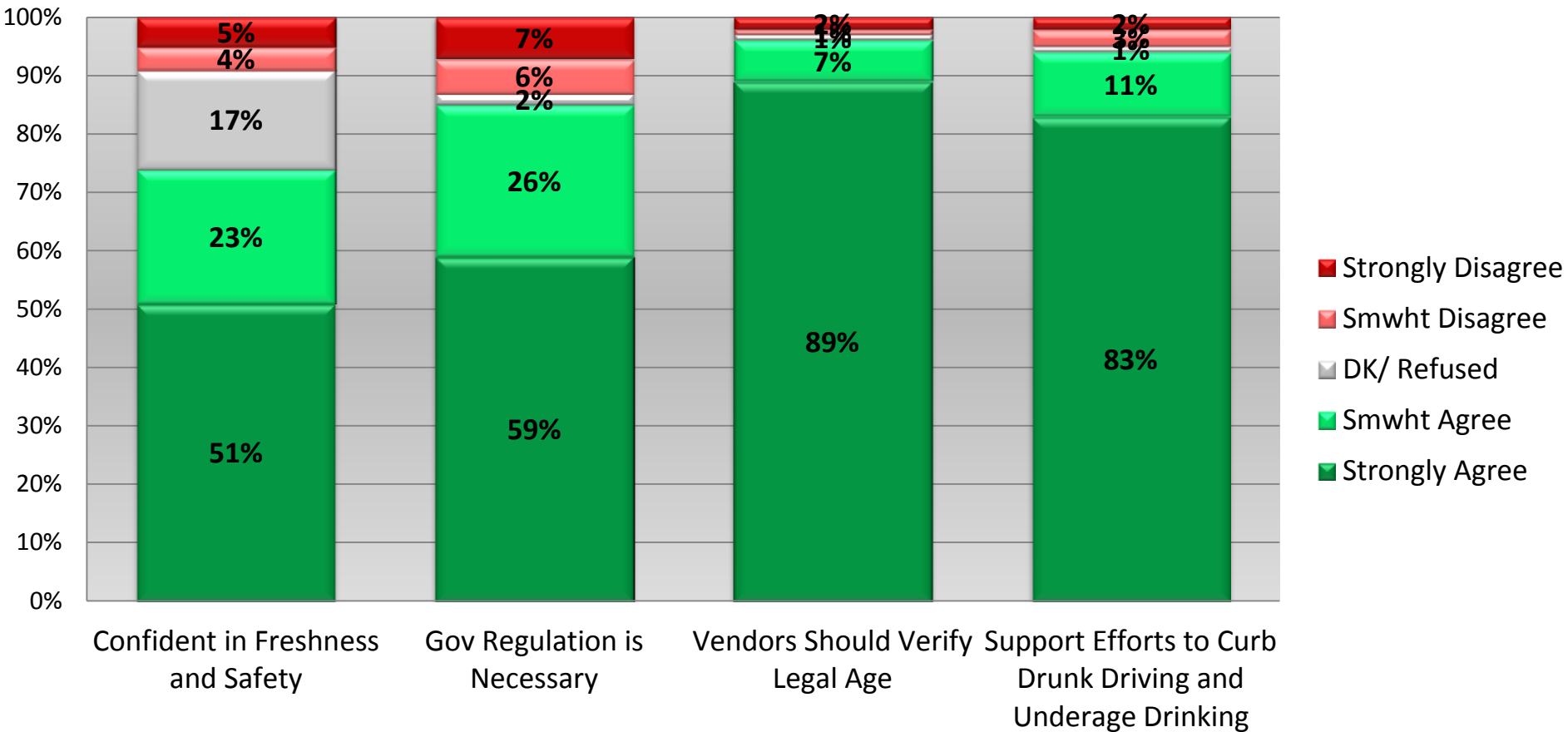
Values Statements: Choice



	Easy to Find	Sell Online	Not Enough Places to Buy
Total Agree	87%	14%	12%
Total Disagree	10%	82%	83%

Safety is very important to adults across the country, who nearly universally agree with efforts to verify legal age and to curb drunk driving deaths and underage drinking.

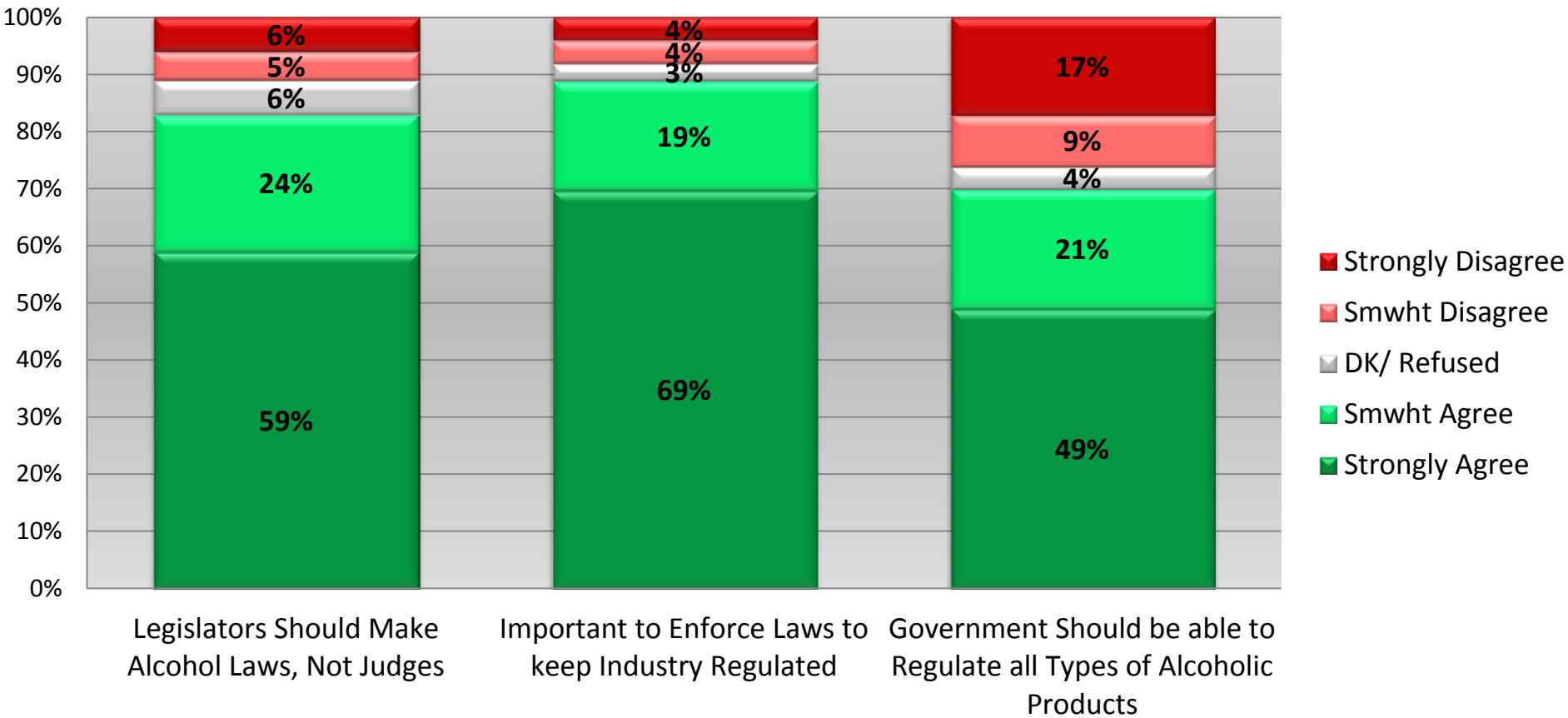
Values Statements: Safety



	Confident Fresh and Safe	Regulation Necessary	Verify Age	Curb Drunk Driving and Underage Drinking
Total Agree	74%	85%	96%	94%
Total Disagree	9%	13%	3%	3%

Agreement with local decision making is very strong on all three fronts: legislators, not judges, should make the law; enforcement is important, and government should be able to regulate all types of alcohol.

Values Statements: Local Control

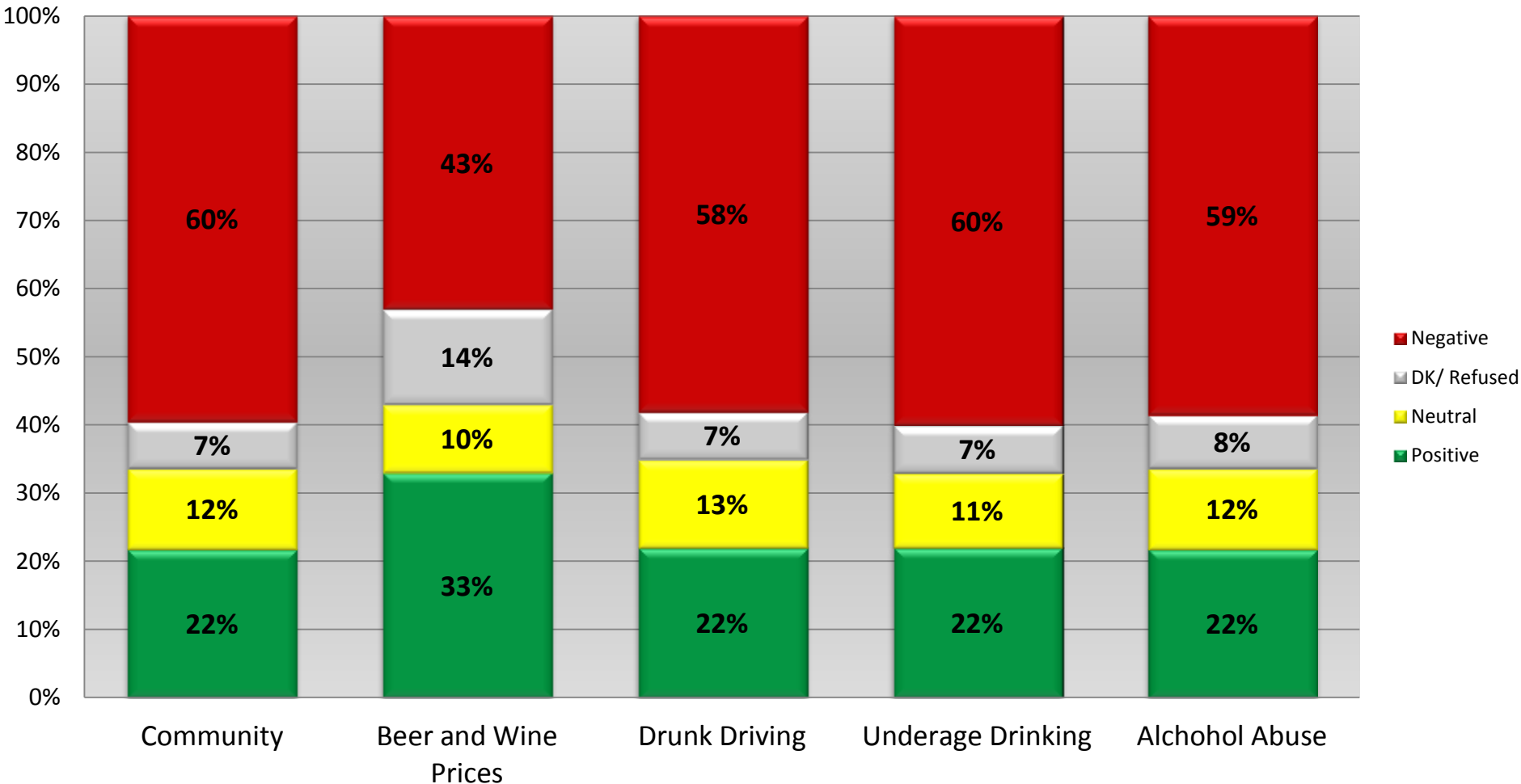


	Legislators Should Make Law	Important to Enforce	Government Should Be Able to Regulate
Total Agree	83%	88%	70%
Total Disagree	11%	8%	28%

The perceived negative effects of a state losing the ability to regulate alcohol, according to strong supporters, are potentially disastrous. Outside of the cost of alcohol, a strong majority of adults believe deregulation would be negative across the board.

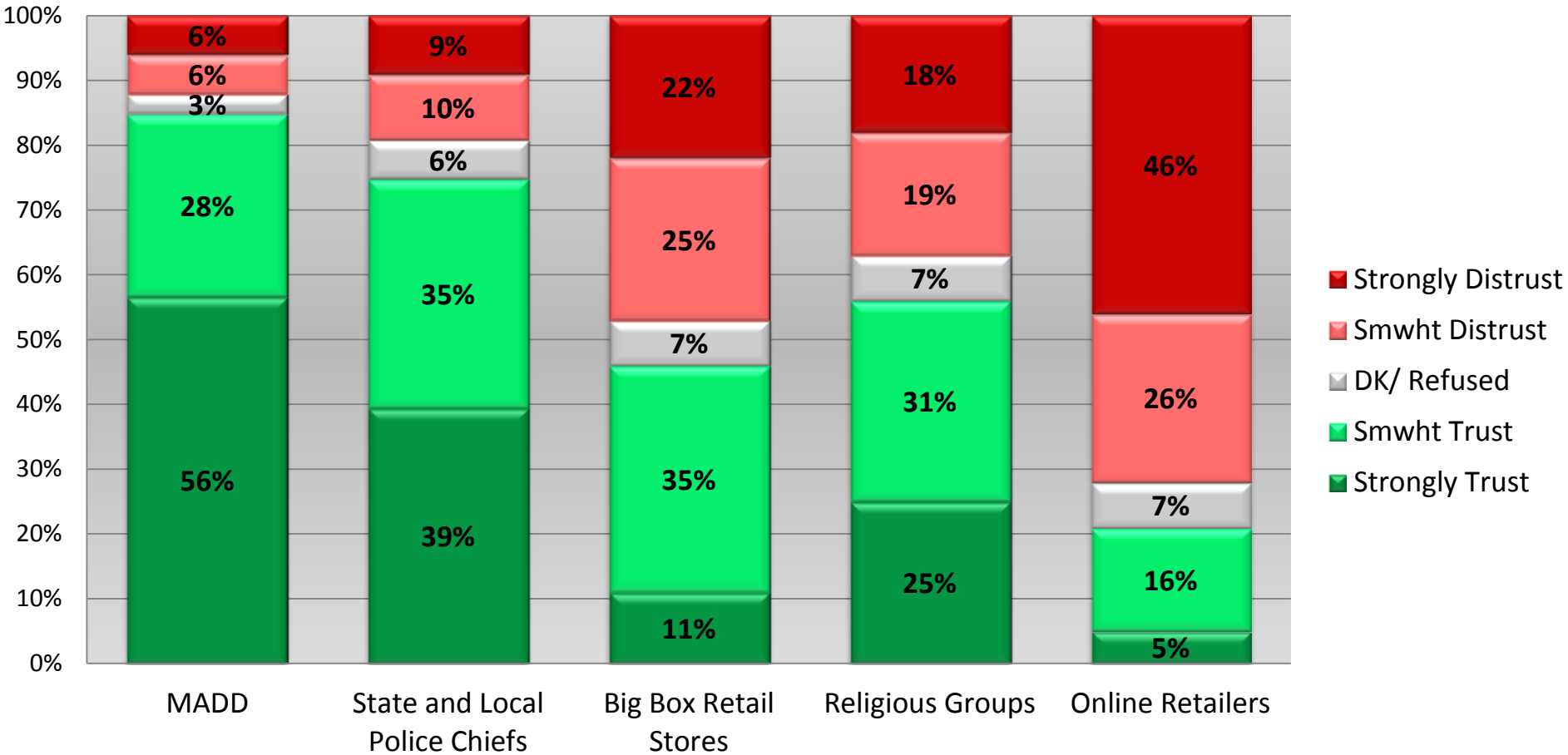
Effects of States Losing Regulatory Authority According to Strong Supporters

If your state was no longer able to set such a (regulatory) requirement, do you think it would have a positive or negative effect on...?



Online retailers are trusted by few adults, while MADD is seen as a credible source for information on alcohol by more than eight in ten adults. Local police chiefs and religious groups are also seen as credible sources, but adults are split on the credibility of big box retail stores.

Sources of Alcohol Information



	MADD	Police Chiefs	Big Box Stores	Religious Groups	Online Retailers
Total Agree	84%	75%	46%	56%	21%
Total Disagree	13%	19%	47%	37%	72%

Summary

Summary

- Americans want alcohol regulations to be locally-controlled. They believe that the effects of alcohol require a different set of rules than other products and that the state, comprised of locally elected leaders, should be in charge- not faceless corporations.
 - Nearly 80% of adults support a state's right to set its own laws and regulations.
 - More than seven in ten (71%) of adults believe alcohol is different from other products and needs state regulation and nearly three-quarters (73%) believe that local businesses, not global corporations, should be responsible for distribution.
 - Three-quarters (76%) of adults support the current regulatory system that includes the producer-distributor-retailer-consumer chain.
 - Support is very strong across the demographic spectrum and includes majorities of those who favor the free market over regulation and among those who have purchased alcohol over the internet. This demonstrates that even those who philosophically oppose regulations support the current system when it comes to alcohol.

Summary

- **Regulation is seen as necessary.**
 - There is strong agreement that regulation is necessary (86%), that age should be verified before selling alcohol (96%), and support for laws designed to curb drunk driving deaths and underage drinking (94%).

- **While choice is important to Americans, most adults (87%) think it is easy to find and purchase alcohol in their communities, and disagree that there are not enough places in their communities to buy alcohol (83%)**

- **The most compelling reason for keeping the state's regulatory power is the potential danger of removing that authority, which may lead to overconsumption, increased drunk driving accidents, and more underage drinking.**
 - This is evident in the strong perception that removing a state's regulatory authority would have a negative impact on the community, underage drinking, and alcohol abuse.

Research Design & Demographics

Research Design

Wilson Perkins Allen Opinion Research conducted a research study of adults aged 21 and older nationwide.

Respondents were contacted by phone via a live telephone operator interview March 17 and 20-21, 2011. The study has a sample size of n=1000 adults. The sample was pre-stratified by geographic region and post-stratified by gender, age group, ethnicity, educational attainment and household income in order to ensure representativeness. The margin of error is equal to $\pm 3.1\%$ in 95 out of 100 cases.

Chris Wilson, Bryon Allen, Ryan Steusloff, Daniel Narvaiz, and Matt Cuddy contributed to this research and analysis.

Demographics

Generation	Survey Results
21-34	30%
35-44	15%
45-54	17%
55-64	18%
65+	18%
Ideology	
Very Conservative	23%
Somewhat Conservative	23%
Moderate	30%
Liberal	18%

Party	Survey Results
GOP	29%
Independent	26%
Democrat	35%
Religion	
Protestant	40%
Evangelical	12%
Catholic	23%
Other	19%

Demographics

Region	Survey Results
New England	6%
Middle Atlantic	13%
East North Central	13%
West North Central	9%
South Atlantic	21%
East South Central	8%
West South Central	8%
Mountain	7%
Pacific	15%

Ethnicity	Survey Results
White	67%
African-American	12%
Hispanic	13%
Gender	
Men	49%
Women	51%



Wilson Perkins Allen Opinion Research

For additional information about this data please feel free to contact:

Chris Wilson

Partner & CEO
cwilson@wparesearch.com

Bryon Allen

Partner & COO
ballen@wparesearch.com

We do much more than collect information. We interpret and analyze data to develop actionable strategies and tactics to best position our client versus the competition.

202.470.6300