

Donath Business & Media
The Fleet Sheet's Final Word
Herzmann s.r.o.

Post–election expectations of influentials 2013

Final Survey Report

Prague, October 2013

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About the survey

This pre-election survey maps the opinions of readers of the prestigious Internet bulletin *FS Final Word*. It is a follow-up to a similar survey conducted prior to the May 2010 parliamentary elections. Given the minimal change in the *Final Word*'s readership, we are able to provide some interesting comparisons in terms of such things as the views of readers on political parties' impact on the Czech economy and the business community's support of political parties. The *Final Word* is published in English by the Fleet Sheet (E.S. Best s.r.o.).

This survey differs from other polls in the professional composition of its sample of respondents, and it should not be taken as the opinion of the overall Czech population. Top and mid-level managers, entrepreneurs and independent consultants comprise 73.5% of all respondents. Such sectors as finance, media and communication services are represented at a higher rate than their proportion in society. Most respondents wield medium and higher levels of decision-making authority and are significantly influential in the formation of opinions among their peers. 80.2% of the respondents are older than 35.

The survey was conducted between September 19 and October 4, 2013, by means of DBM's electronic polling system, based on the SurveyMonkey platform. The invitation to join the survey was delivered by e-mail to 6,342 registered *Final Word* readers. The invitation was also promoted by Erik Best through his Twitter and Facebook accounts as well as in the *Final Word* bulletin itself. A total of 1,442 respondents took part in the survey, of whom 1,154 were addressed by e-mail (an 18% response rate). Another 288 responses derived from the aforementioned social networks. The respondents were able to complete the survey in either English or Czech.

We present the results in the form of graphs showing the rate of response to the statements put forth. The graphs are supplemented by brief descriptions of the main findings or other circumstances that we consider interesting. Detailed information about the structure of the sample of respondents can be found at the end of the report.

Main findings

The political orientation of the sample group as a whole is clearly to the right. The sample group as a whole has almost nothing positive to say about those on the left, including the president. Compared with 2010, ODS lost its leading position in the opinion of the sample group. The survey results show that its place was taken by TOP 09 and partially also by ANO 2011.

An unstable left-of-center government will emerge, which will not improve the business environment

The businesspeople who responded to the survey expect election results that are contrary to their own preferences. According to 89.5% of respondents, the left should win, either by a broad margin or at least a narrow one. Of the respondents, 77.2% do not expect the next government to improve the business environment. Businesspeople are rather pessimistic about the stability of the next government, with 59.9% believing it will not serve out the full election term.

ODS has lost its lead. TOP 09 has captured the business vote

If only businesspeople voted in the October elections, TOP 09 would win (with 55.3%), followed by ANO 2011 (20.1%) and ODS (18.0%). ODS has lost its top position. In our 2010 survey, respondents expected ODS to get 61.5% of the votes of businesspeople, followed by TOP 09 with 35.2%.

Zeman is bad news

A clear majority of businesspeople are very critical of the role of President Miloš Zeman and his impact on Czech politics. Of respondents, 57.8% see his role as clearly negative and 21.2% as rather negative.

Svobodní (The Free Citizens) are the real right. The Zemanites are similar to the Communists

Businesspeople believe the Free Citizens are the only truly right-wing party. ODS and TOP 09 are more often seen as being center-right. SPOZ is seen as being close to the Communist Party.

ANO 2011 scores high in the election campaign

The respondents believe ANO 2011 has the most effective election campaign (41.9%), with SPOZ (15.7%) and ČSSD (11.3%) lagging far behind.

TOP 09 for the Czech economy

The respondents believe that parties whose programs are the most responsive to the needs of the Czech economy are TOP 09 (29.7%), ANO 2011 (15.6%), the Free Citizens (11.3%) and ODS (11.1%).

Priorities for the new government

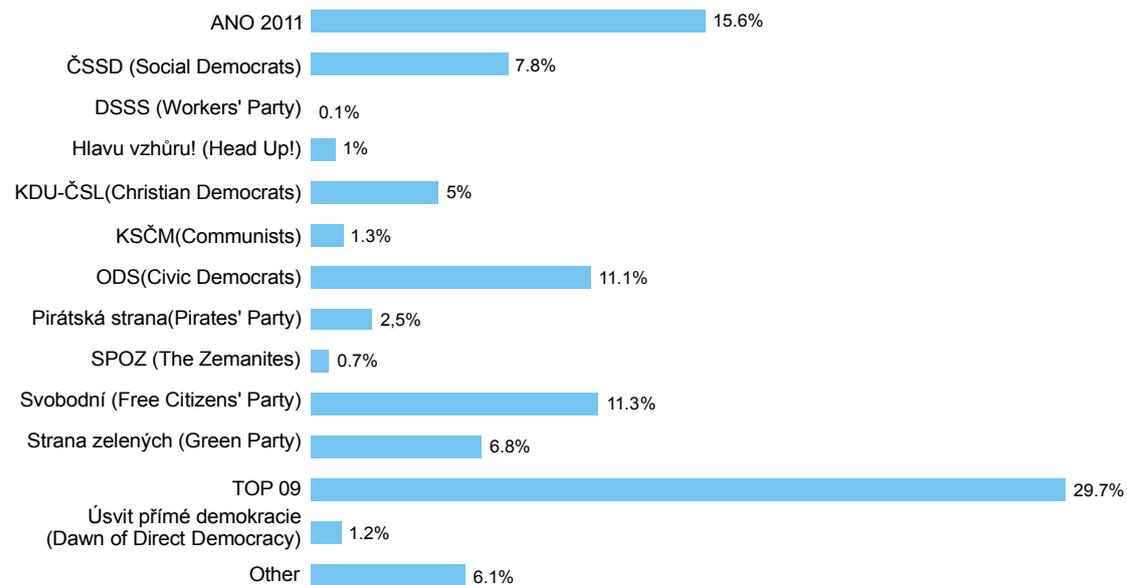
The three main priorities for the next government, according to the respondents, are combating corruption (54.0%), economic policy (49.0%) and public finances (43.2%).

No clear stars in the prime ministerial sky

The respondents do not see a bright prime ministerial star on the horizon. The most favored candidates for the post are Miroslava Němcová (9.4%), Miroslav Kalousek (9.2%), Bohuslav Sobotka (7.2%), Karel Schwarzenberg (6.9%), Andrej Babiš (5.3%) and Petr Mach (4.8%). However, only Sobotka is seen as being in a position to become the head of the expected left-of-center Cabinet.

TOP 09 maintains its position as the best party for the Czech economy

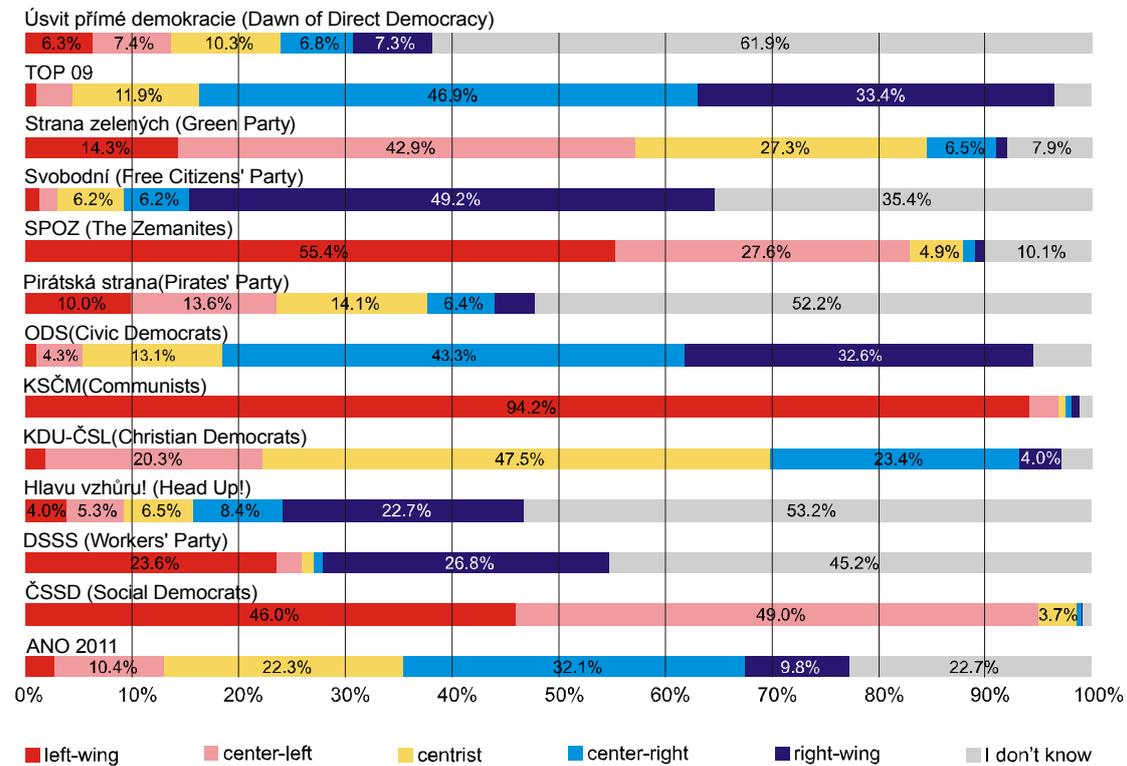
Question 1: Which party's election program best reflects the current needs of the Czech economy?



The respondents believe the election programs most responsive to the needs of the Czech economy are those of TOP 09 (29.7%), ANO 2011 (15.6%), the Free Citizens (11.3%) and ODS (11.1%). The new political parties ANO 2011 and the Free Citizens pushed ODS down to the No. 4 position. TOP 09 and ODS have lost half of their support since 2010, while ČSSD and KDU-ČSL have improved by a few points. The potential of the Free Citizens shows up clearly here, but it does not translate into expected election results.

The Free Citizens are the only party of the true right. SPOZ is similar to the Communists

Question 2: Where do you place the following parties on the political spectrum?

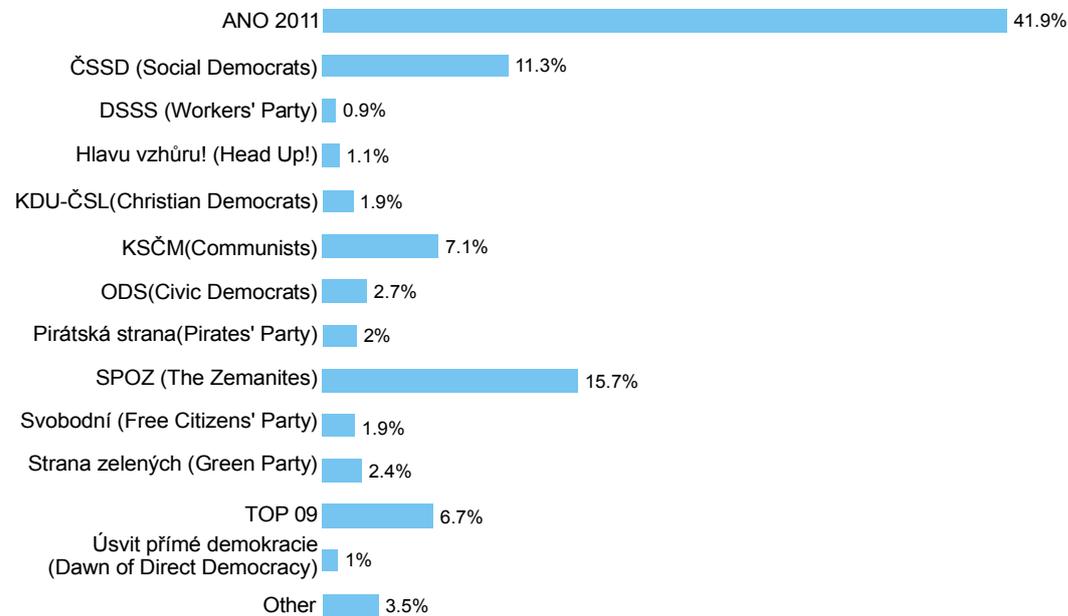


Unlike in 2010, we asked this time that respondents assess where the parties fall on the left-to-right political spectrum. It is clear from the survey results that most of the respondents stand right-of-center, because they view the Czech political scene as being shifted more to the left than most of the parties view themselves. The result is the respondents view the Free Citizens as the only truly right-wing party. ODS and TOP 09 are more often seen as center-right. ANO 2011 is shifted in a similar way (its leader defines the party as being “right-of-center”). The Zemanites are perceived as close to the Communists. Quite interestingly, Czech respondents place ČSSD more often on the left than in the center-left, in contrast with the foreigners who took part in the survey. Foreign managers – probably influenced by their perception of the European Socialists – tend to see ČSSD as center-left, while the party’s leftist rhetoric shifts it farther left in the eyes of the Czech respondents.

As for the new parties and movements, a good part of the respondents are not able to identify their political orientation. This is most obvious in terms of Úsvit/Dawn of Direct Democracy (61.9%) and Hlavu vzhůru/Head Up! (53.2%).

ANO scores high in the election campaign

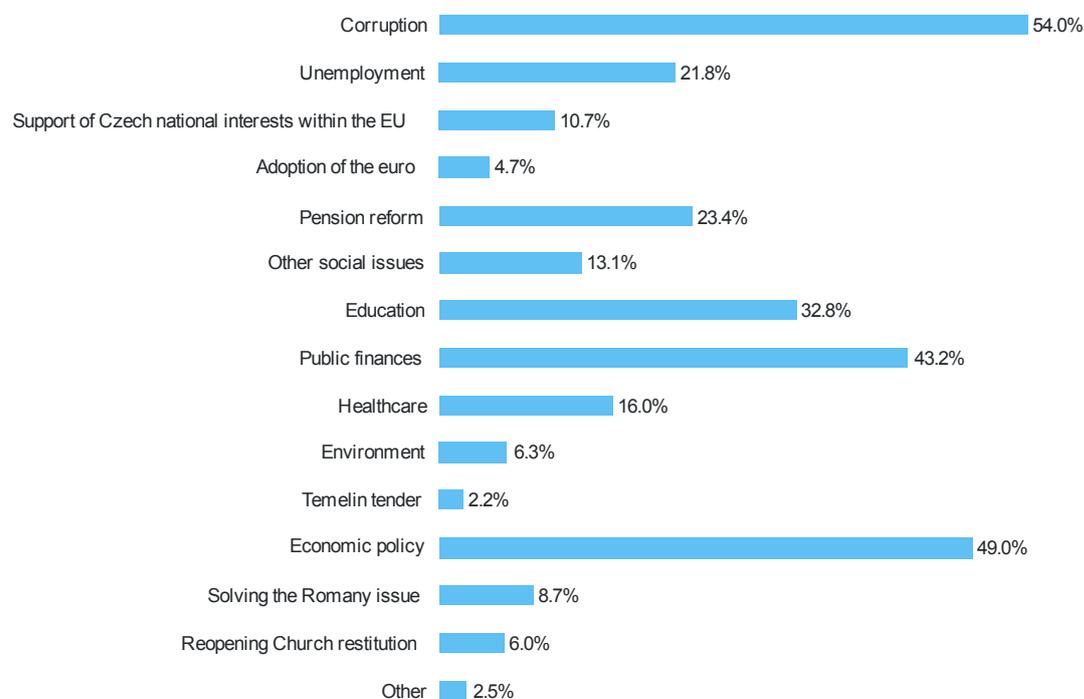
Question 3: Which election campaign do you consider the most effective in terms of how it addresses its target audience?



The respondents consider the most effective campaign to be that of ANO 2011 (41.9%), with SPOZ (15.7%) and ČSSD (11.3%) lagging far behind. In 2010, the top three in this respect were ČSSD (52.1%), TOP 09 (21.5%) and Věci veřejné (11.7%). The campaigns of all parliamentary parties, except for the Communists, have deteriorated this time in the eyes of the survey's respondents.

Corruption, public finance and economic policy – top issues for the next government

Question 4: Which of the following items should be the primary focus of the next government (select three key areas)?

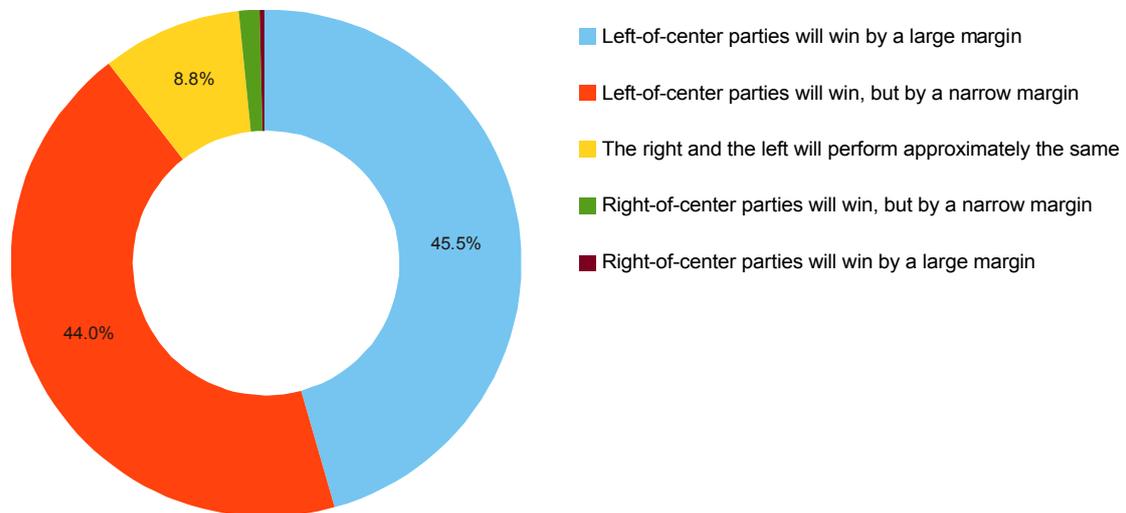


The respondents believe the three key priorities of the next government should be: combating corruption (54.0%), economic policy (49.0%) and public finances (43.2%). A clear difference is visible in the degree of emphasis put on these issues by Czech and foreign managers. The top priority for Czech managers is economic policy (51.4%), followed by combating corruption (49.6%) and public finances (41.8%). Their foreign colleagues are much more concerned with the problem of corruption (65.6%), followed by public finances (46.6%), with economic policy coming in third (42.9%).

As mentioned, most of our respondents are right-of-center voters. However, the results suggest that Czech right-of-center voters want the state to play a stronger economic role than the foreign respondents want. This coincides with the results of other sociological surveys that suggest the right-of-center electorate in the Czech Republic is not rooted in conservative or liberal values to the same extent as in Western Europe.

It's going to be a left-of-center government

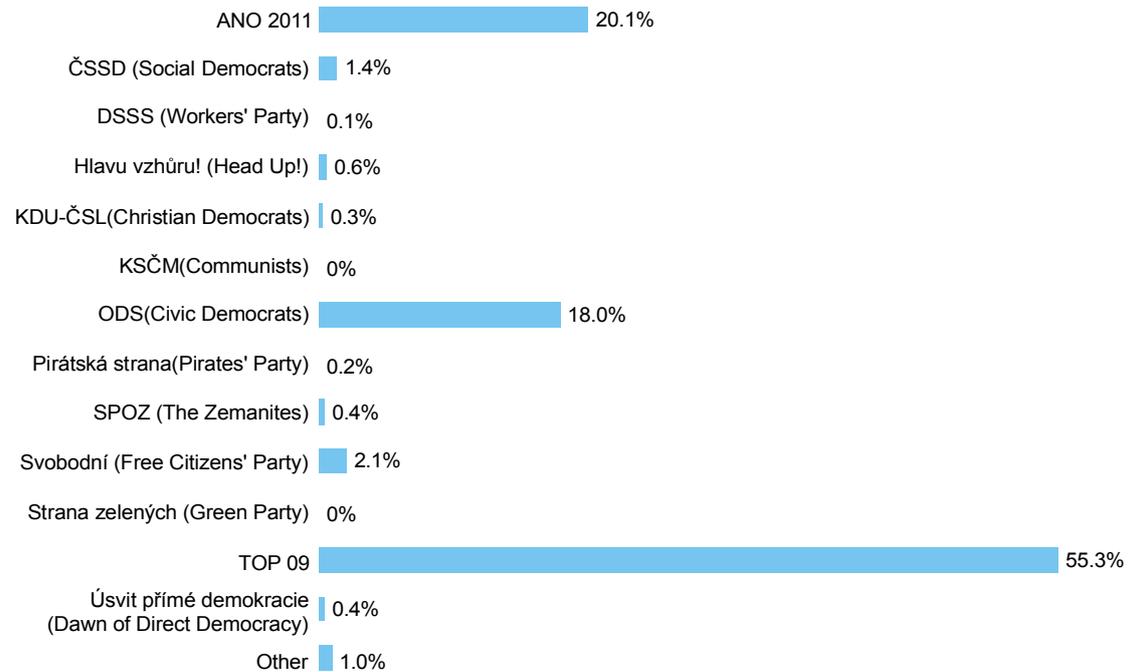
Question 5: How do you expect the elections to turn out?



The expected election results go against the wishes of most of the respondents. A full 89.5% of respondents do not expect right-of-center parties to be needed to form a post-election coalition, because the left is going to win by a large margin (45.5% of respondents), or at least by a narrow margin (44.0%). Czech managers tend to expect a clear victory by the left, while their foreign colleagues tend to expect a narrower victory.

ODS lost its lead. TOP 09 won the entrepreneurial and managerial vote

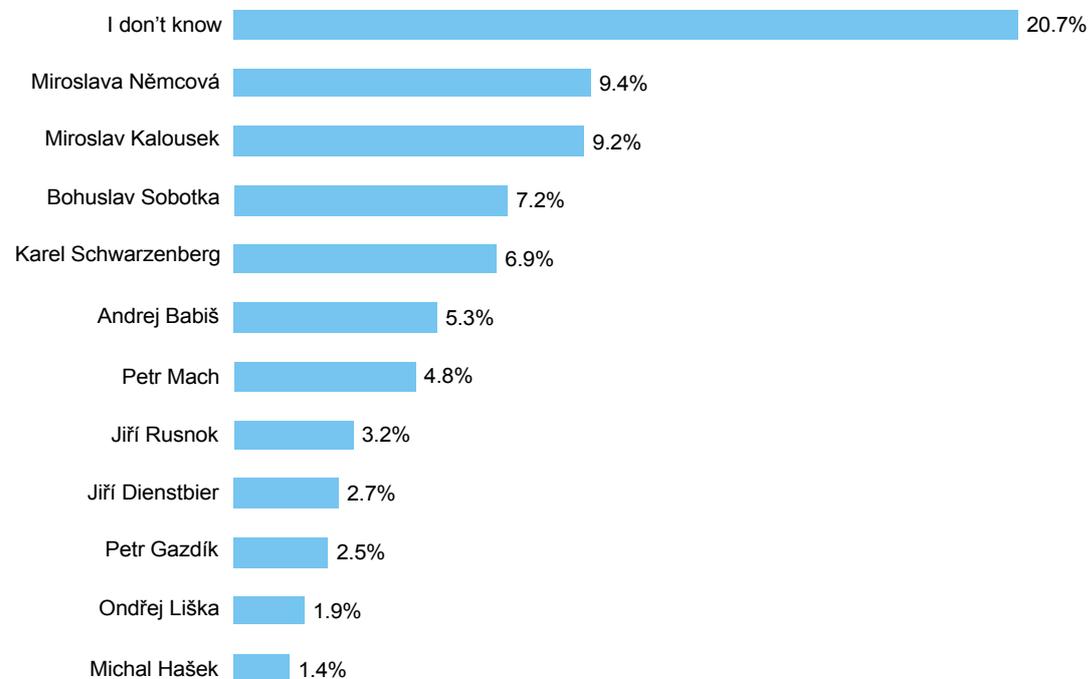
Question 6: Which party or grouping do you expect to be chosen most often by entrepreneurs and managers?



If only businesspeople voted in the early elections in October, TOP 09 would be the clear winner (with 55.3%), followed by ANO 2011 (20.1%) and ODS (18.0%). There would be a clear right-of-center majority in Parliament. An interesting finding of our survey is that almost two-fifths of the respondents expect managers to vote for a different party this time than in 2010. Our survey then suggested businesspeople would vote overwhelmingly for ODS (61.5%) and TOP 09 (35.2%). This represents a visible shift of voters away from ODS toward other parties, which is also reflected in the population as a whole.

No clear stars in the prime ministerial sky

Question 7: Who do you think would make the best candidate for prime minister after the elections?

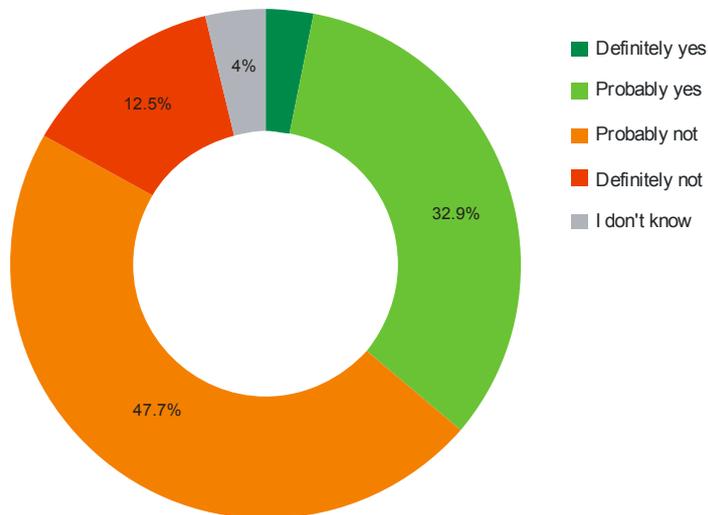


The graph shows the ranking of all the politicians who received the support of more than 1% of respondents in an open-ended question. Václav Klaus and Jan Švejnar were among those who ended up just below this level. Most of the names do not fit with the 89.5% majority opinion of respondents that the left is going to win the elections, but the names do reflect the election preferences of the respondents. The most preferred prime ministers are Miroslava Němcová, Miroslav Kalousek, Karel Schwarzenberg, Andrej Babiš and Petr Mach, though one can hardly expect any of them to head a left-of-center Cabinet. The winner among the left-of-center politicians was Bohuslav Sobotka (7.2%), who beat his fellow party members Michal Hašek (1.4%) and Jiří Dienstbier (2.7%). More than twice as many respondents (20.7%) than in 2010 stated they do not know of any worthy candidate.

It is interesting to compare how businesspeople view the leaders of individual parties and how the Czech public at large views them (as presented by MfD on October 10, 2013, in a Focus survey). Although Sobotka did not win the hearts of the business community, managers prefer him over his fellow ČSSD member Michal Hašek, just as the public in general did. Our respondents also perceive Miroslava Němcová as being the only ODS figure with prime ministerial potential. However, they have the opposite view of two leading figures of TOP 09, as businesspeople somewhat prefer Kalousek to Schwarzenberg, while Kalousek completely failed with the general public compared with the aforementioned MfD survey.

Stability nowhere on the horizon

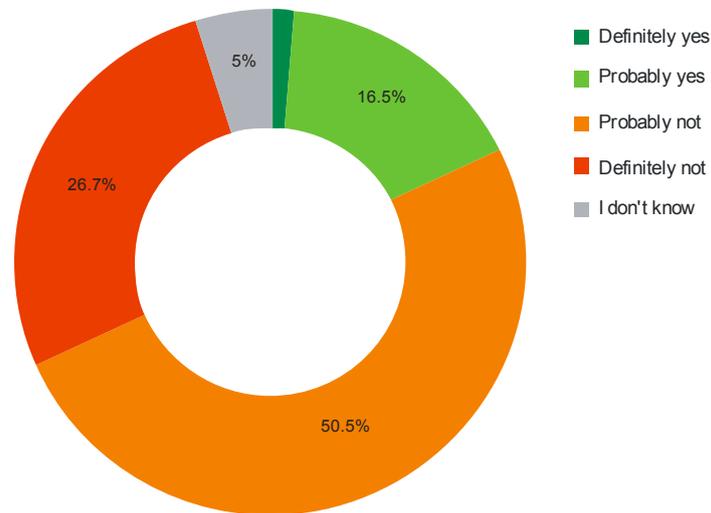
Question 8: Do you expect the new government to produce a stable government that will last the entire term?



The business community is rather pessimistic about the stability of the next Cabinet, and the reality of the past few years gives good reason for this. The majority (60% of respondents) does not think it likely that a stable Cabinet able to last the full term in office will result from the elections.

Better conditions for business? Not likely.

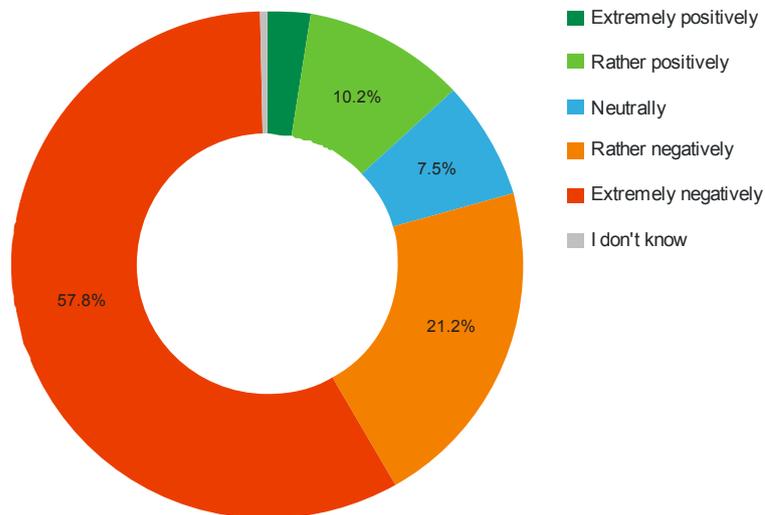
Question 9: Do you expect the new government to improve the business environment in the country?



Businesspeople expect the left to win (89.5%). The majority of respondents think the political programs of the parties on the left of the political spectrum are not among the most responsive to the needs of the Czech economy, so it is no wonder 77.2% of respondents do not expect any improvement in the business environment in the country.

Zeman does not fare well

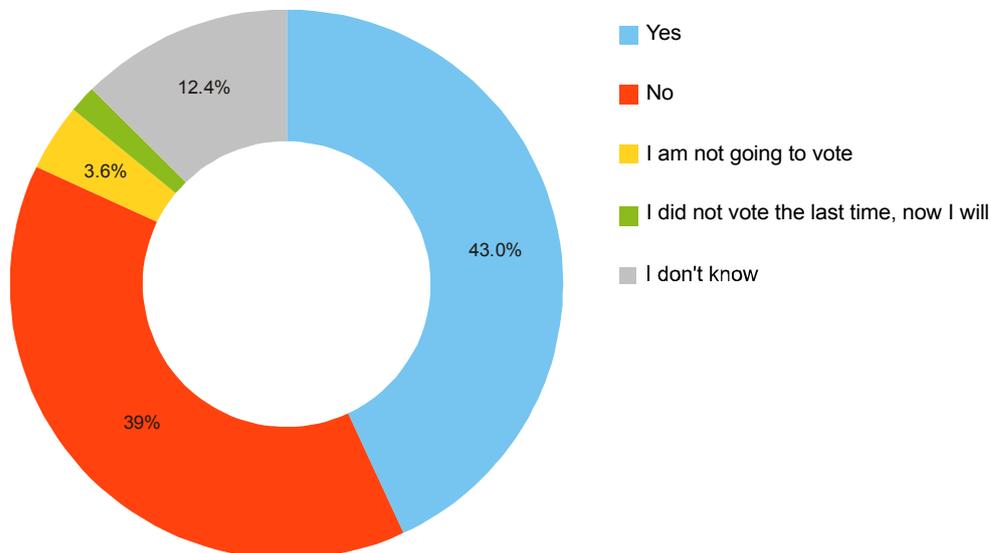
Question 10: How do you rate the actions of President Miloš Zeman and his impact on Czech politics?



The second round of the direct presidential election resulted in a confrontation between Karel Schwarzenberg (TOP 09) and Miloš Zeman (SPOZ). Given the political preferences of the respondents (mainly right-of-center), it is clear a large majority are not fans of the directly elected president. They are very critical of his impact on Czech politics; 57.8% of the respondents see it as negative and 21.2% as rather negative.

Retreat from ODS

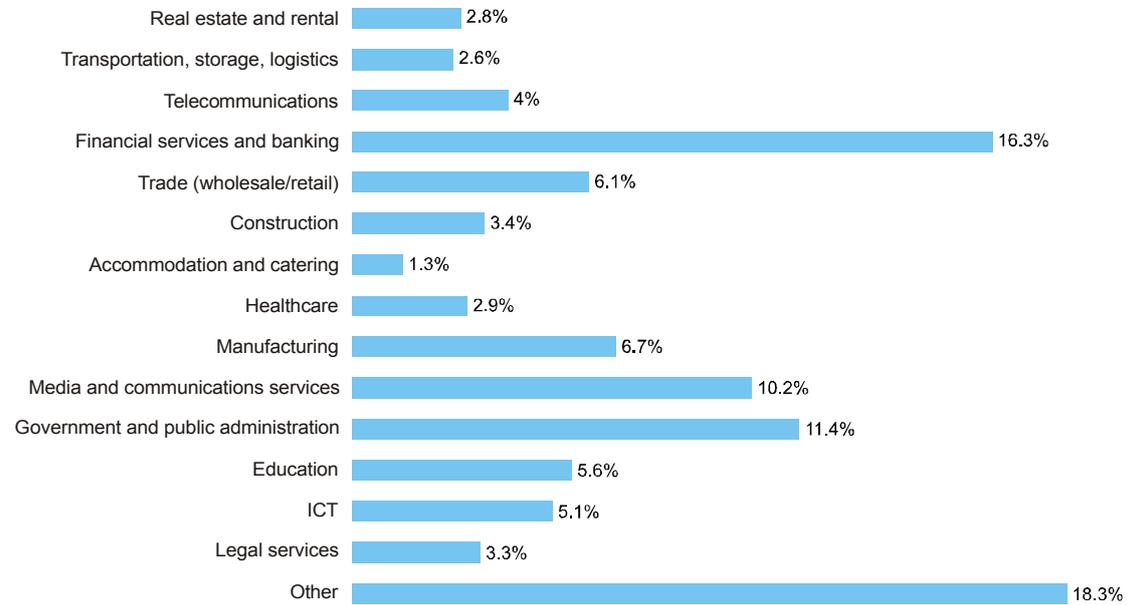
Question 11: If you have the right to vote in the Czech Republic, are you going to vote for the same party/grouping as last time?



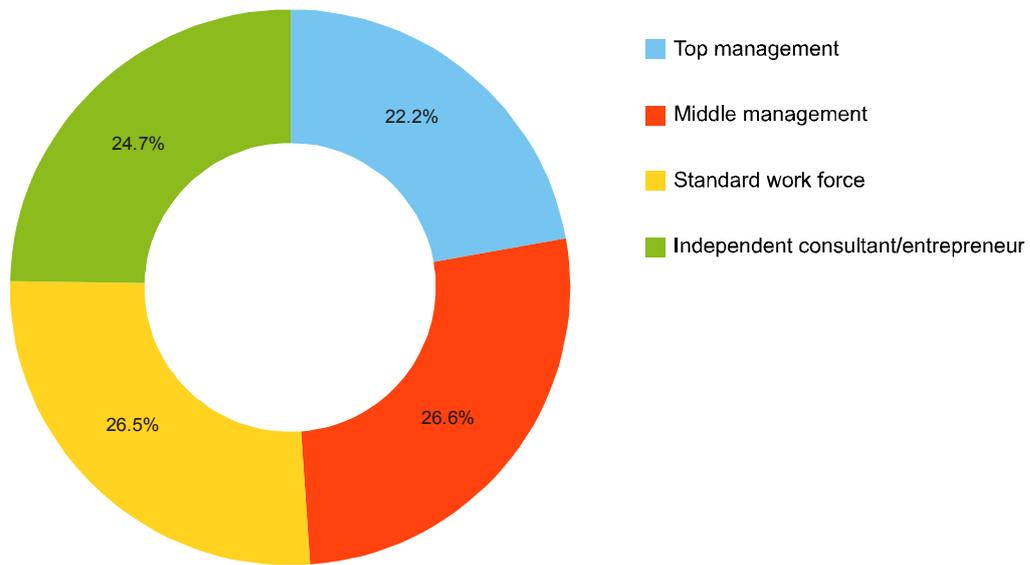
Only 43% of the respondents are sure to vote for the same party or grouping as last time; 39.4% are going to vote for another party, and 12.4% have not yet decided. As the response to the previous questions suggests, ODS voters are shifting to other right-of-center parties. Similar trends are visible among the general public.

About the respondents

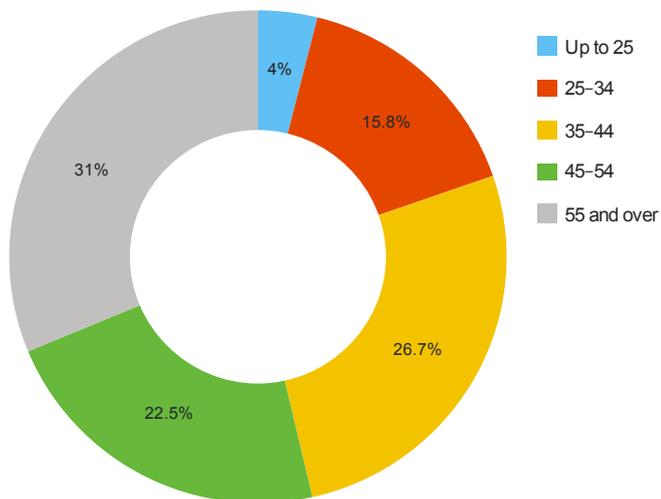
Your industry is:



Your position:



Your age:



About the authors



Donath Business & Media

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Donath Business & Media
Tel.: +420 224 211 220
E-mail: tomas.jelinek@dbm.cz

Fleet Sheet (E.S. Best s.r.o)
Tel.: +420 296 580 160
E-mail: info@fleet.cz

Herzmann s.r.o.
tel.: +420 731 403 699
E-mail: jan@herzmann.cz