

To: Wisconsin Manufacturers and Commerce

From: Brian Nienaber

Re: Key findings from a statewide survey of likely voters in Wisconsin

Methodology

The Tarrance Group is pleased to present these key findings from a survey of likely voters in Wisconsin. All respondents interviewed in this study were part of a fully representative sample of N=500 registered likely 2020 voters. Responses to this survey were gathered January 14-16, 2020. The confidence interval associated with a sample of this type is $\pm 4.5\%$ in 19 of 20 cases.

Overview of Key Findings

- Voters remain highly engaged in the 2020 elections with voter enthusiasm at levels usually seen in the final weeks of a high profile contested election cycle.
- A majority of voters think the state is headed in the right direction though a majority of Republicans and a plurality of Independents think the state is on the wrong track.
- Regarding the direction of the country, a majority of voters think the country is on the wrong track though 79% of Republicans think the country is headed in the right direction.
- On name identifications, Governor Evers is right side up (48% favorable/38% unfavorable) while President Trump is upside down (45% favorable/54% unfavorable).
- On job approvals, President Trump is at near parity (48% approve/50% disapprove) while Governor Evers has a majority (55%) approve rating.
- On the ballot tests, Biden holds just a 1-point lead (47%-46%) over Trump. The Trump-Sanders ballot is a tie with each candidate at 47%.
- For the state economy, a majority of voters think it will stay about the same. In addition, a majority of voters think their personal economic situation will stay about the same.
- On health insurance, more than nine-in-ten voters say their health insurance costs either stayed the same or increased. Also, an overwhelming majority of voters support transparent health care pricing requirements and quality ratings.
- Fewer than 5% of voters think any type of the taxes tested – state income, property taxes, or sales taxes – are too low.

- More than eight-in-ten voters oppose local governments using tax dollars to lobby for higher taxes.
- A majority of voters continue to select capitalism over socialism as the better economic system for their family.
- There is not a consensus on the best areas of focus for tax cuts though property tax cuts (40%) and state income tax cuts (33%) are notably more popular than sales tax cuts (8%).
- A plurality of voters oppose a proposal to increase property taxes on businesses.
- On education policies, more than two-in-three voters find it very concerning that a majority of Wisconsin students fail to meet proficiency standards for math and reading.
- A plurality of voters think public schools in Wisconsin are doing a good job of preparing students to be successful. This is a notable decline in voter confidence on this issue.
- There continues to be overwhelming support for providing incentives for internships and apprenticeships.
- There also continues to be broad support for school choice and for funding for practical secondary education offerings like technical education and computer programming.
- There is majority support for increasing the gas tax by 5-cents per gallon though the intensity on this issue is with the opposition.
- On energy policies, a plurality of voters oppose efforts to combat global warming through policies that cost jobs.
- There is majority opposition to all of the legislative proposals tested – raising taxes on manufacturing production, eliminating the caps on property taxes, and eliminating drug testing for public assistance beneficiaries.

Political Environment

- Voter enthusiasm is notably high for this early stage of the election cycle. More than eight-in-ten (88%) voters indicate they are extremely likely to vote. Independents (92%) are slightly more enthused than Republicans (86%) and Democrats (87%). However, overall this is a level of voter enthusiasm usually found in the final weeks of a competitive election cycle.
- A majority (51%) of voters think the state is headed in the right direction while 38% of voters think the state is on the wrong track. This question continues to be a proxy for attitudes about Governor Evers with a majority of Republicans (50%) thinking the state is on

the wrong track versus a majority of Democrats (62%) thinking the state is headed in the right direction. It is notable that Independents are at 47% right direction and 32% wrong track. These Independent voters will be crucial this cycle with the likely significant increase in voter turnout.

- In contrast, the question about the direction of country is a proxy for attitudes about President Trump. Overall, a majority (52%) of voters think the country is on the wrong track while 44% of voters think the country is headed in the right direction. However, more than three-in-four Republicans (79%) think the country is headed in the right direction while majorities of Independents (59%) and Democrats (88%) think the country is on the wrong track.

Name Identifications

- Governor Evers and President Trump were tested in the name identification series. Responses are summarized in the chart below.

Name	Favorable	Unfavorable	No Opinion	Never Heard	Fav change since 4/2019	Unfav change since 4/2019	Net image change
Tony Evers	48%	38%	10%	5%	0%	-5%	4%
Donald Trump	45%	54%	2%	0%	-1%	1%	-2%

- While Governor Evers remains right side up on his name identification and has seen a slight improvement in his overall image since April 2019, he remains a polarizing figure in the state. Fully 87% of Democrats have favorable image of him while more than two-in-three Republicans (68%) have an unfavorable image of him.
- Regionally, Evers has a majority favorable image in the Milwaukee DMA (53%) and the Madison DMA (56%), but his image is below 50% favorable in the other media markets across the state.
- President Trump remains upside down and continues to have a majority unfavorable rating. However, he continues to have a majority favorable image in the Green Bay DMA (54%) and among men (51%), Republicans (85%), and very conservative voters (92%). The President continues to have a strong appeal among key voting blocs in Wisconsin.

Job Approvals

- For President Trump, his job approval rating is 48% approve and 50% disapprove. President Trump continues to have a majority disapproval rating among key voting blocs like women (56%), seniors (56%), Independents (59%), and 4 of 4 voters (54%). However, the

Presidential ballot tests indicate that the President will be highly competitive against two of the major Democratic contenders for the nomination.

Presidential ballots

- The Trump-Biden ballot has Biden with a 1-point lead (47%-46%) though Trump has a 4-point advantage (42%-38%) among voters who have made a definite choice. Just 6% of voters are undecided on this ballot.
- The Trump-Sanders is tied with both candidates at 47% though Trump has a 5-point advantage (42%-37%) among voters who have made a definite choice. Just 7% of voters are undecided on this ballot.
- Overall, 45% of voters select Trump on both ballots and 44% of voters select the Democratic candidate on both ballots. Even at this early date, a significant number of voters have already made their decision in this Presidential election. The presidential election in Wisconsin will be very close.

The ballot among key demographics for both of these races is shown below.

Demo group	Trump	Und	Biden	Trump lead/deficit		Trump	Und	Sanders	Trump lead/deficit
Milwaukee DMA	45%	6%	49%	-4%		46%	4%	50%	-4%
Green Bay DMA	57%	6%	37%	20%		55%	8%	37%	18%
Madison DMA	34%	9%	57%	-23%		34%	9%	57%	-23%
Rest of state	49%	6%	45%	4%		52%	8%	41%	11%
Men	53%	7%	40%	13%		53%	5%	42%	11%
Women	40%	6%	54%	-14%		41%	7%	52%	-11%
Not employed	49%	6%	45%	4%		46%	6%	48%	-2%
Employed	49%	6%	45%	4%		49%	7%	44%	5%
Retired	40%	7%	53%	-13%		42%	6%	52%	-10%
18-44 year olds	48%	8%	44%	4%		48%	7%	44%	4%
45-64 year olds	49%	3%	49%	0%		49%	5%	46%	3%
Seniors	42%	8%	50%	-8%		42%	7%	51%	-9%
Republicans	92%	2%	6%	86%		93%	2%	6%	87%
Independents	34%	14%	52%	-18%		35%	16%	49%	-14%
Democrats	3%	5%	92%	-89%		3%	4%	93%	-90%
Extremely likely	46%	6%	48%	-2%		47%	6%	47%	0%
4 of 4 voters	44%	5%	51%	-7%		43%	6%	51%	-8%
3 of 4 voters	45%	9%	46%	-1%		48%	10%	42%	6%

The economy

- Asked to consider the state economy, 54% of voters think it will stay about the same; 13% think it will get worse; and 25% think it will improve. This is a notable increase in economic optimism since the April 2019 survey with “get worse” decreasing by 8-points and “improving” increasing by 4-points.
- On their personal economic situation, 60% of voters think it will stay the same; 28% think it will get better; and 7% think it will get worse. This represents a 12-point increase in voters thinking their economic conditions will get better.
- A key theme of President Trump’s re-election campaign will be the improving national economy and the low national unemployment rate. This theme should be effective in Wisconsin given the increased economic optimism among voters here.

Health insurance costs

- On health insurance costs, the overwhelming majority (92%) indicate their health insurance costs either stayed the same (50%) or increased (42%). This important and often major expense continues to stay the same or cost more for the vast majority of the Wisconsin electorate.
- Given this experience, one would expect the substantial support seen for transparent health care pricing requirements and quality ratings. Fully 81% of voters support this proposal, including 56% who strongly support it.

Taxes and economic systems

- Voters were asked to assess if various state taxes were too high, too low, or about right. Responses are summarized in the chart below.

Tax	Too high	Too low	About Right	Change in too high since 4/2019	Change in too low since 4/2019	Change in about right since 4/2019
State income taxes	42%	3%	50%	6%	1%	-7%
Property taxes	53%	2%	40%	2%	-1%	-3%
Sales taxes	23%	4%	72%	2%	1%	-2%

- As seen above, almost no voters think any of these taxes are too low. A majority (53%) of voters continue to think that property taxes are too high.
- Tax cutting continues to enjoy broad support among Republicans. Majorities of Republicans think that state income taxes are too high (52%) and that property taxes are too high (61%). In addition, one-in-three (30%) Republicans think that sales taxes are too high.
- There is broad and intense opposition to the use of local governments using tax dollars to pay for lobbyists to advocate for higher taxes. Fully 84% of voters oppose this practice, including 73% of voters who are strongly opposed. Even 77% of liberals oppose this practice.
- Regarding capitalism versus socialism, a majority (64%) of voters continue to believe capitalism is the better system for their family though 16% of voters think socialism is the better system. This represents a net 7-point increase in support for capitalism since the April 2019 survey.

- The strongest support for socialism comes from partisan Democrats (32%), driven by support among female Democrats (30%).
- On possible areas of focus for tax cuts, 40% of voters select property taxes; 33% of voters select state income taxes; and 8% of voters select sales taxes. This data makes clear that property taxes and income taxes are the two taxes that will have the broadest support for making cuts.
- A plurality (47%) of voters oppose the legislative proposal to increase property taxes on businesses. This represents a 13-point decline in opposition to this proposal since the April 2019 survey though these malleable voters have divided evenly with support for this proposal growing 7-points to 40% while those unsure about it have increased 7-points to 14%
- This proposal has majority opposition from Republicans (63%) and conservatives (61%). It draws notable levels of support from seniors (46%), Democrats (54%), and liberals (55%). This is very much an issue where partisanship is a key determinant of your view.

Education policies

- Fully 93% of voters find it very concerning (68%) or somewhat concerning (25%) that a majority of Wisconsin students fail to meet proficiency standards for math and reading. In fact, a majority of voters in every major demographic group find this situation very concerning.
- A plurality (45%) of voters think public schools in Wisconsin are doing a good job of preparing students to be successful. Another 38% of voters do not think this. This represents a notable decline in voter confidence since the April 2019 survey – a 10-point drop in voters who think Wisconsin schools are successful.
- Much of this decline is driven by shifting views among partisans. There has been a 10-point drop among Republicans in thinking the state is doing a good job so that a plurality (46%) of Republicans now think the state is not doing a good job.
- There continues to be overwhelming support (85%) for giving high schools financial incentives to give students internships and apprenticeships. Every major demographic group continues to have majority support for this proposal.
- On school choice, there continues to be broad support (82%) among voters for giving parents the choice to decide which schools their child attends. In fact, this represents a 5-point

increase in support since the April 2019. On this survey, even 74% of liberals, 81% of union households, and 74% of partisan Democrats support this concept.

- Asked to think about junior high and high school funding, fully 91% of voters favor providing high schools with funding for industrial arts, technical education, and computer programming to junior high and high schools. This proposal had 90%+ support on the April 2019 survey as well.

Transportation and energy policies

- Regarding a proposal to increase the gas tax by 5-cents per gallon, there is majority support (51%) for this proposal. A proposal for an 8-cents per gallon increase had majority opposition on the April 2019 survey.
- However, the intensity on this issue is with the opposition. Among the 42% of voters who oppose this proposal, 31% are strongly opposed. In contrast, just 25% of voters strongly support this proposal.
- As one would expect, liberals (67%) and Democrats (68%) are driving support for this proposal while Republicans (56%) and very conservative voters (60%) are strong drivers in opposition to this proposal.
- A plurality (45%) of voters oppose policies to combat global warming even if these policies would result in middle class manufacturing workers losing their jobs. However, another 42% of voters support these policies to combat global warming.
- This question illustrates well the extent to which combating global warming has shifted from a policy debate to a political one. Seven-in-ten (70%) partisan Democrats support these policies even with the caveat about job losses. In contrast, eight-in-ten (80%) of partisan Republicans oppose this proposal.

Legislative policy proposals

➤ Three (3) legislative proposals were tested. Responses are summarized in the chart below.

Proposal	Favor	Unsure	Oppose	Change in Favor since 4/2019	Change in Oppose since 4/2019	Net change
Raising taxes on manufacturing production in our state, which would likely result in the loss of many middle-class manufacturing jobs	20%	10%	70%	4%	-8%	12%
Eliminating the caps that hold down property taxes, and instead allow property taxes to be increased as much as 2 percent each year	33%	15%	52%	15%	-27%	42%
Eliminating drug testing in order to qualify for food stamps or welfare benefits	44%	7%	50%	8%	-13%	22%

- While all of these proposals have majority opposition, there has been a notable growth in support for eliminating the property tax caps and in support for ending drug testing for public benefits.
- However, for both of these proposals, there is a notable intensity gap. On eliminating property tax caps, 33% of voters are strongly opposed versus just 12% of voters who are strongly in favor. Regarding ending drug testing for public benefit recipients, 37% of voters are strongly opposed versus 28% of voters who are strongly in favor. Among the voters most likely to engage on these issues, there is more intensity among those opposed to these proposals.