



 MORNING CONSULT

AEM 

Association of
Equipment Manufacturers

MANUFACTURING POLL

Association of Equipment Manufacturers

July 2020

Methodology

National Methodology Statements

This deck contains analysis of two separate, national surveys conducted by Morning Consult on behalf of AEM in January and July 2020. Trends are reflected where applicable.

January National Survey Methodology: This poll was conducted between January 02-03, 2020 among a national sample of 2,025 Registered Voters. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, educational attainment, and region. Results from the full survey have a margin of error of +/- 2%.

July National Survey Methodology: This poll was conducted between July 07-09, 2020 among a national sample of 1,993 Registered Voters. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, educational attainment, and region. Results from the full survey have a margin of error of +/- 2%.

Key Points

- 1 US voters give both presidential candidates poor marks on manufacturing.**
 - Nationally, 50% of registered voters rate President Trump's job supporting the manufacturing industry in office as *just fair/poor*. Democratic candidate Joe Biden's predicted performance on that front is also rated negatively, with 44% saying he would do *just fair/poor* supporting the industry.
- 2 Relative to other issue areas, the importance of candidates' stances on manufacturing has increased the most since January.**
 - 81% of voters indicate in July that manufacturing is important to their vote choice compared to 76% in January.
- 3 92% of surveyed voters said that manufacturing is critical or important to the economy, while 93% said it is critical or important to the job market.**
 - Compared to January 2020, 8% more registered voters view the role of manufacturing as *critical* to the U.S. economy.
 - Much like the public's views on the role of manufacturing on the U.S. economy, the share of those describing the industry as *critical* to the country's job market has increased 5% since January.

- 4 Over a third (36%) of registered U.S. voters say they work in manufacturing or have a family or friend who does.**
 - 15% of U.S. voters say they lost a manufacturing job recently or know someone who has.
 - 24% of Michigan voters, 18% of Ohio voters, 15% of Pennsylvania voters, 12% of Wisconsin voters, and 15% of Texas voters report losing a manufacturing job recently or know someone who recently has.
- 5 9 out of 10 of registered voters believe it is important for elected officials to support American manufacturers amid the difficulties brought about by the COVID-19 pandemic.**
 - 66% of registered voters believe it is very important for elected officials to support manufacturers amid the difficulties brought about by the COVID-19 pandemic.
 - 69% of Ohio voters believe it is very important for elected officials to support manufacturers during the economic fallout of the coronavirus pandemic.
 - 68% of Michigan voters believe it is very important for elected officials to support manufacturers during the economic fallout of the coronavirus pandemic.

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The State of Manufacturing

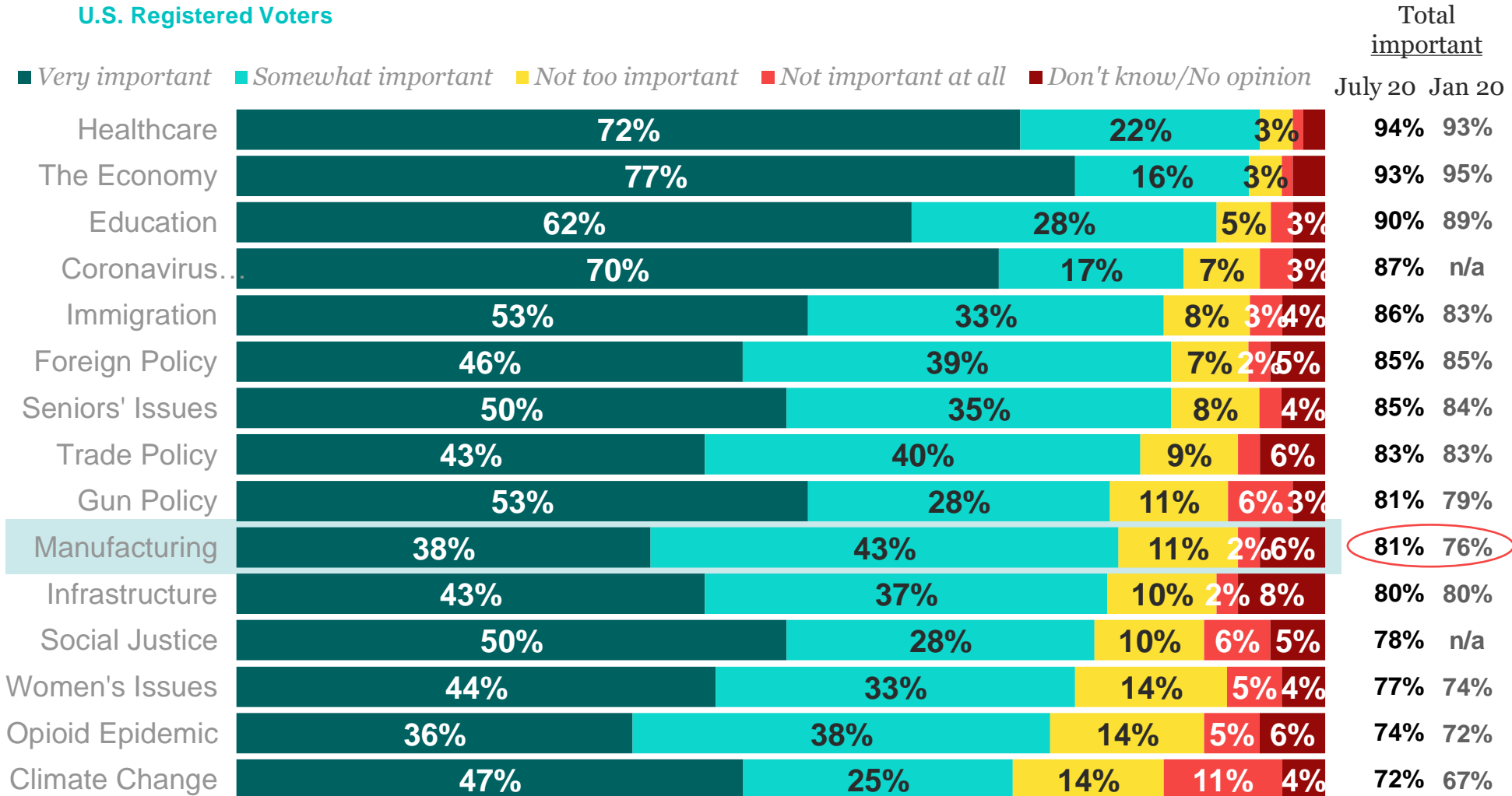
3

**The Politics and Policies of
Manufacturing**

Healthcare and the economy remain the top two issue areas shaping the public's voting decisions in the 2020 presidential election. Manufacturing saw the largest increase in perceived importance since January (+5%), while climate change saw the largest decrease (-5%).

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

U.S. Registered Voters



Ranked by "Total Important"

Top Issues
in 2020
U.S. Registered Voters

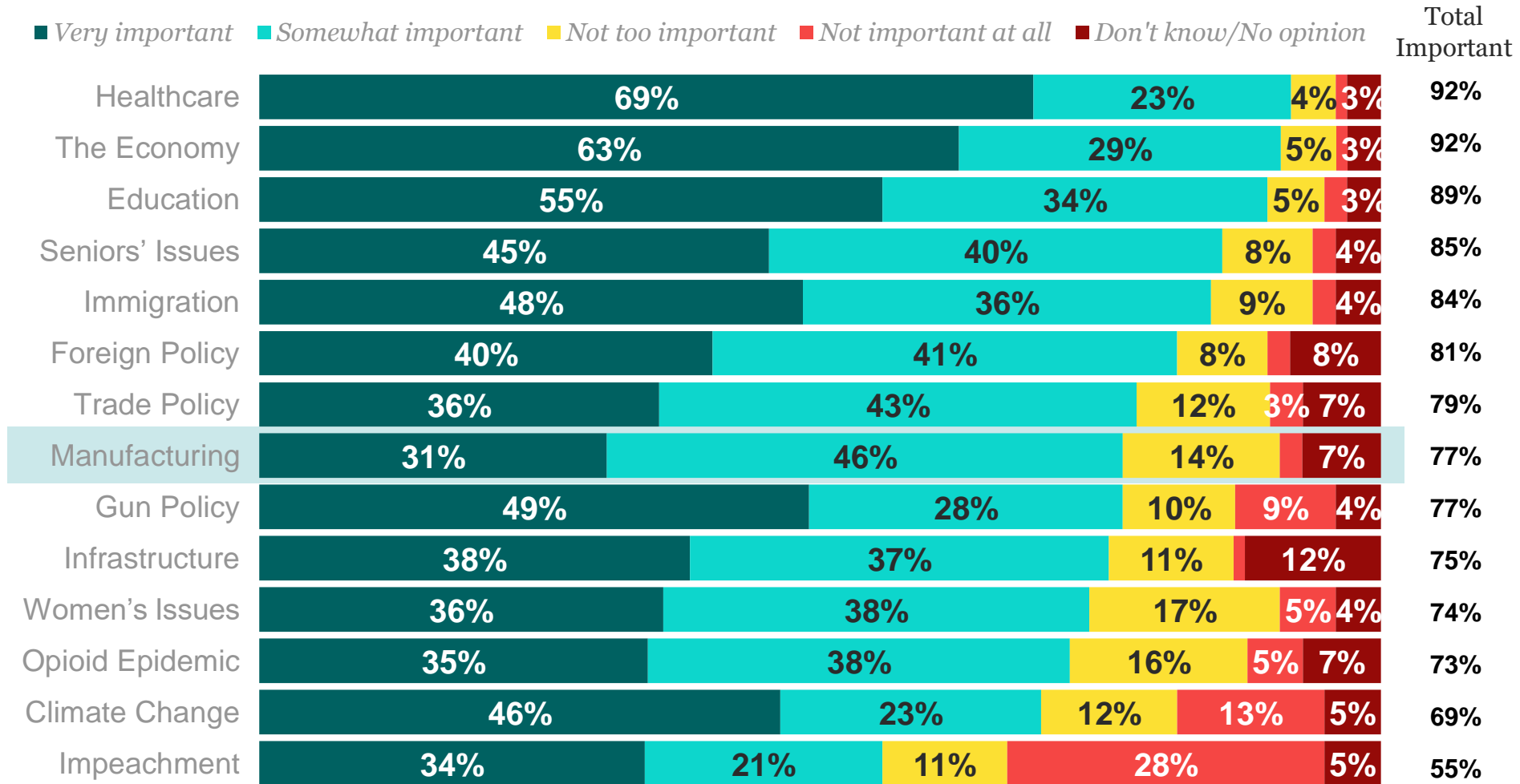
JAN 2020

**Top Issues
in 2020**
Michigan Registered
Voters

In January, healthcare edged out on the economy as the top issue for Michigan voters, with 69% of RVs in the state rating healthcare as a *very important* issue compared to 63% rating the economy as such.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

Michigan Registered Voters



Ranked by "Total Important"

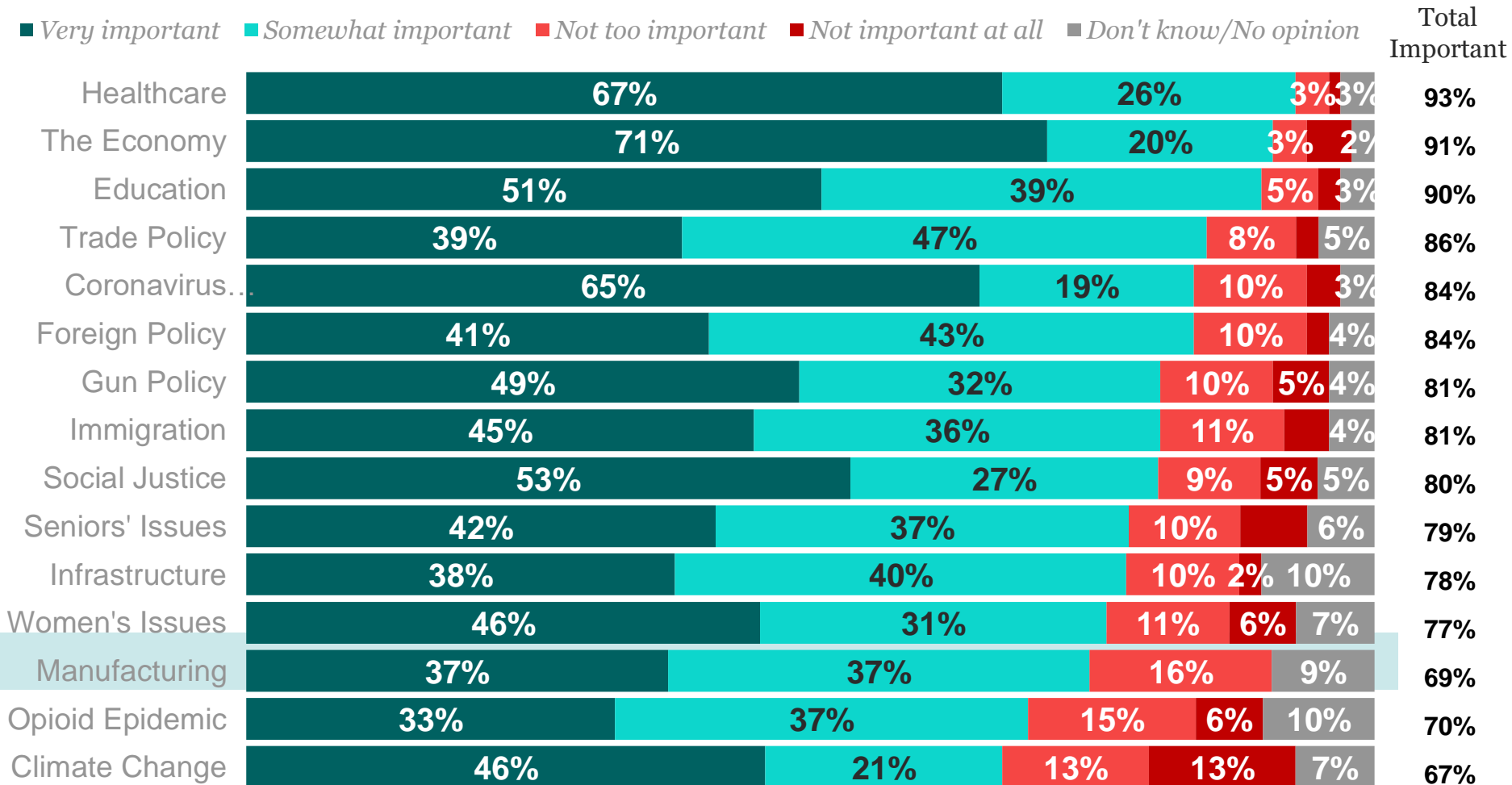
JULY 2020

**Top Issues
in 2020**
Michigan Registered
Voters

Six-percent more Michiganders rated manufacturing as *very important* to their presidential voting decision in July than in January, and overall importance has remained stable at 77%. However, it has been overtaken by other issues like gun policy and infrastructure.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

Michigan Registered Voters



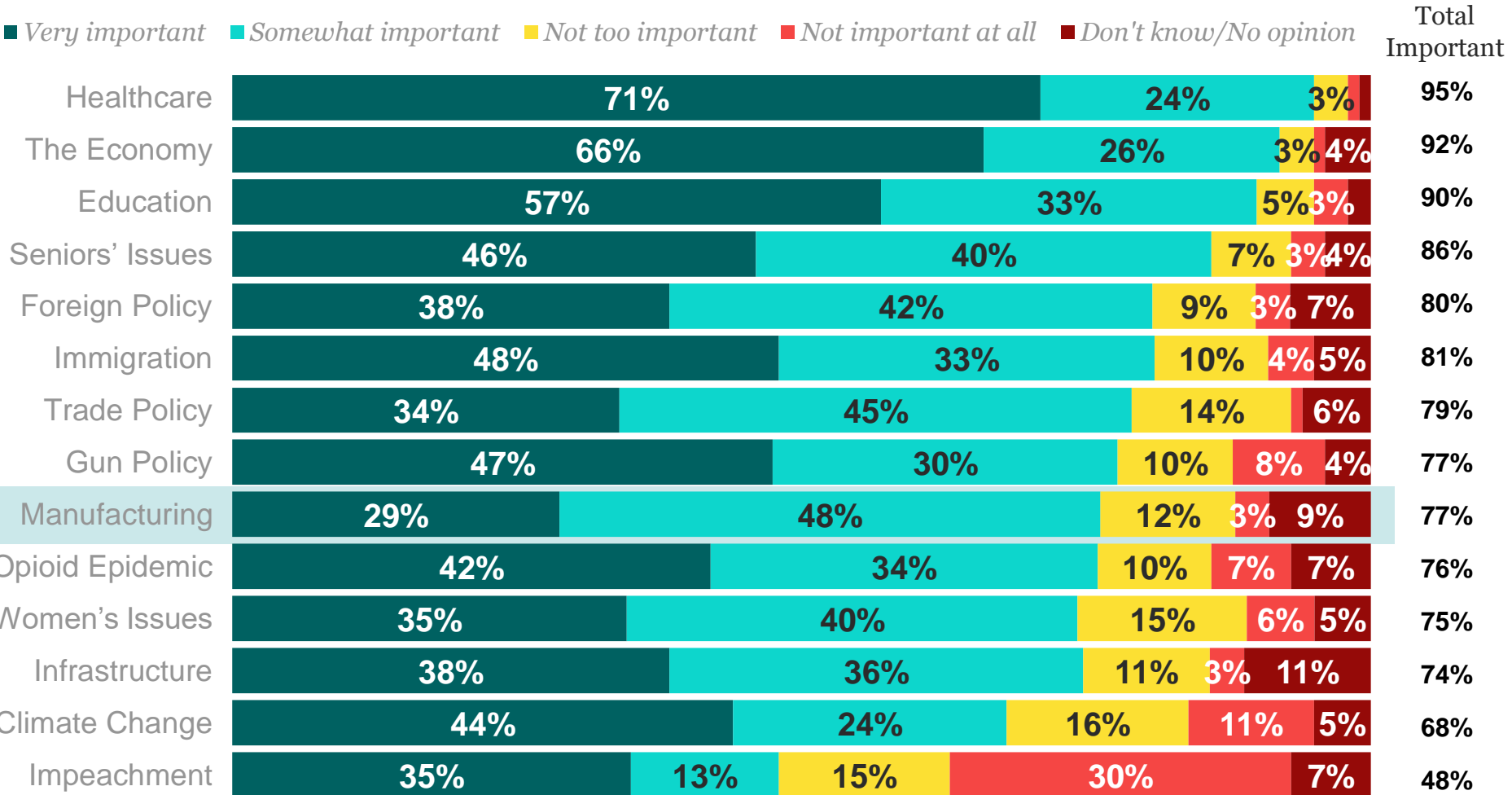
Ranked by "Total Important"

JAN 2020

Healthcare also edged out the economy as the top important issue in Ohio in the January survey.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

Ohio Registered Voters



Ranked by "Total Important"

Top Issues in 2020

Ohio Registered Voters

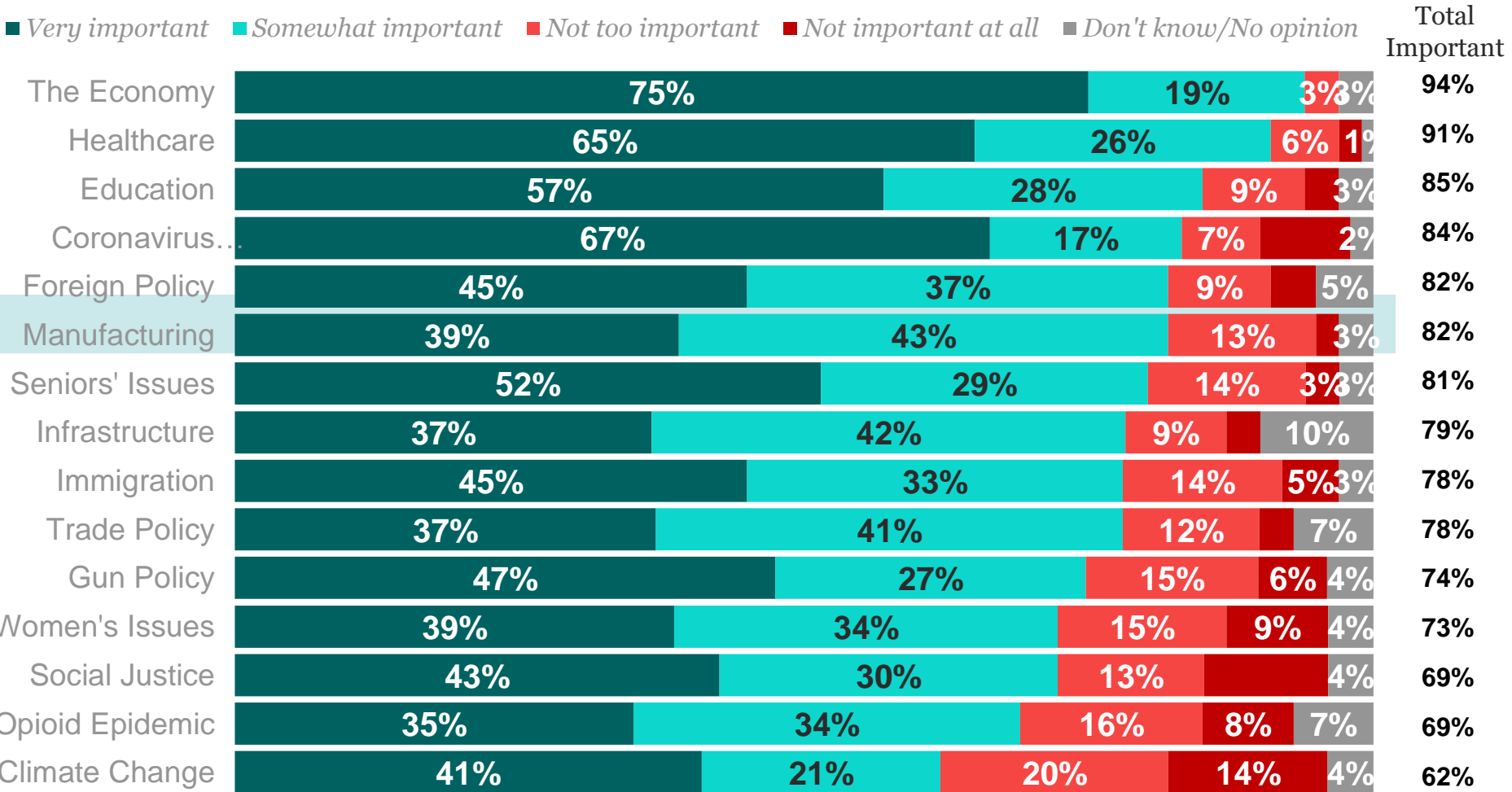
JULY 2020

**Top Issues
in 2020**
Ohio Registered
Voters

Total importance of manufacturing among Ohio RVs rose to 82% in July, up 5% from January. The economy surpassed healthcare as the top issue over that span as well.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

Ohio Registered Voters



Ranked by "Total Important"

JAN 2020

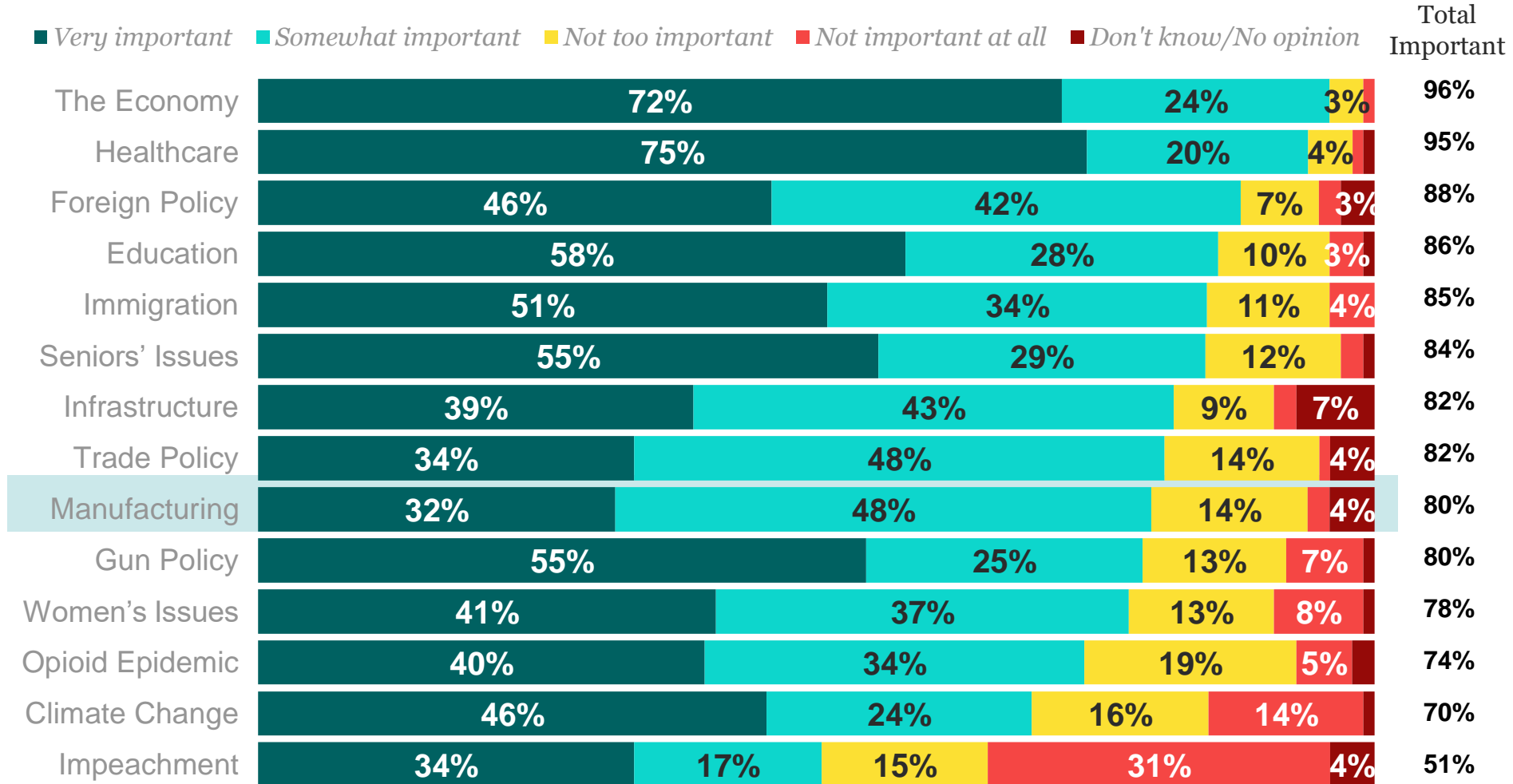
Top Issues in 2020

Pennsylvania
Registered Voters

In January, the state assigning the highest level of importance to manufacturing as an issue area was Pennsylvania, with 80% of voters rating it as *very important*.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

Pennsylvania Registered Voters



Ranked by "Total Important"

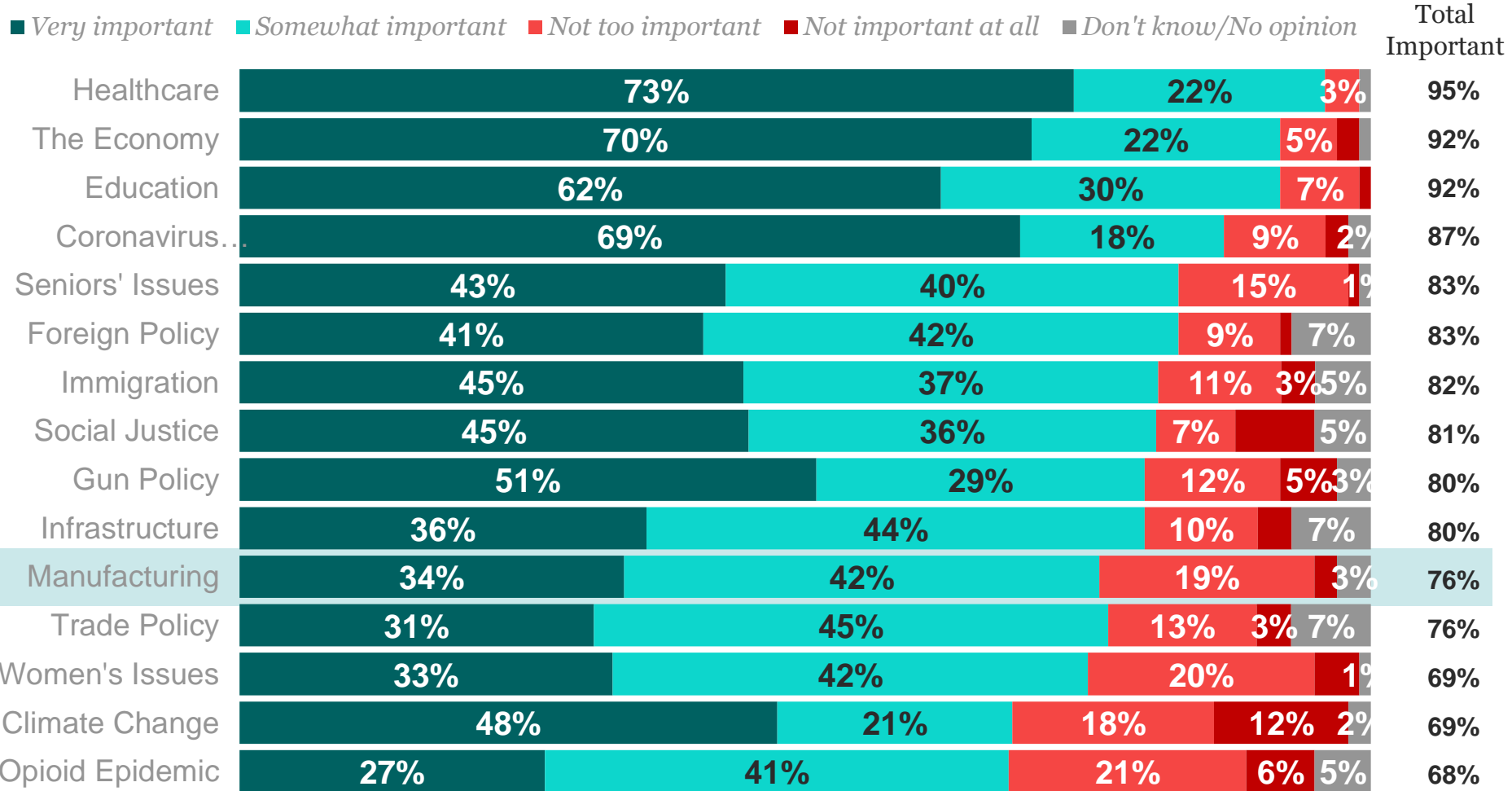
JULY 2020

**Top Issues
in 2020**
Pennsylvania
Registered Voters

In terms of importance to voters, manufacturing has lost some ground in Pennsylvania since January, with 76% *total importance* now compared to 80% on the previous ask.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

Pennsylvania Registered Voters



Ranked by "Total Important"

JAN 2020

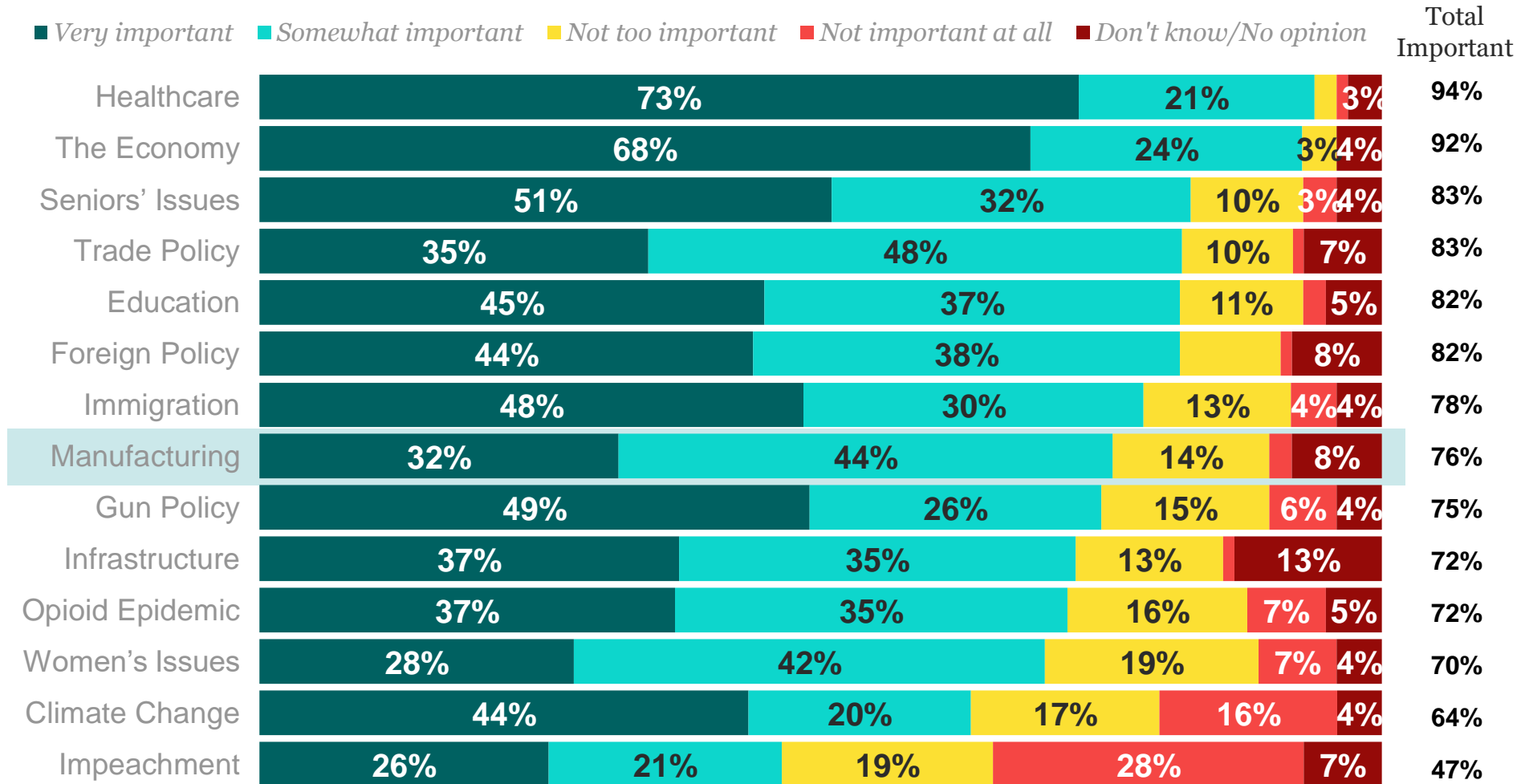
Top Issues in 2020

Wisconsin Registered Voters

In Wisconsin, healthcare also edged out the economy for the top issue spot in January, with 73% of Wisconsin voters saying healthcare would be a *very important* issue area when deciding who to vote for in 2020.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

Wisconsin Registered Voters



Ranked by "Total Important"

JULY 2020

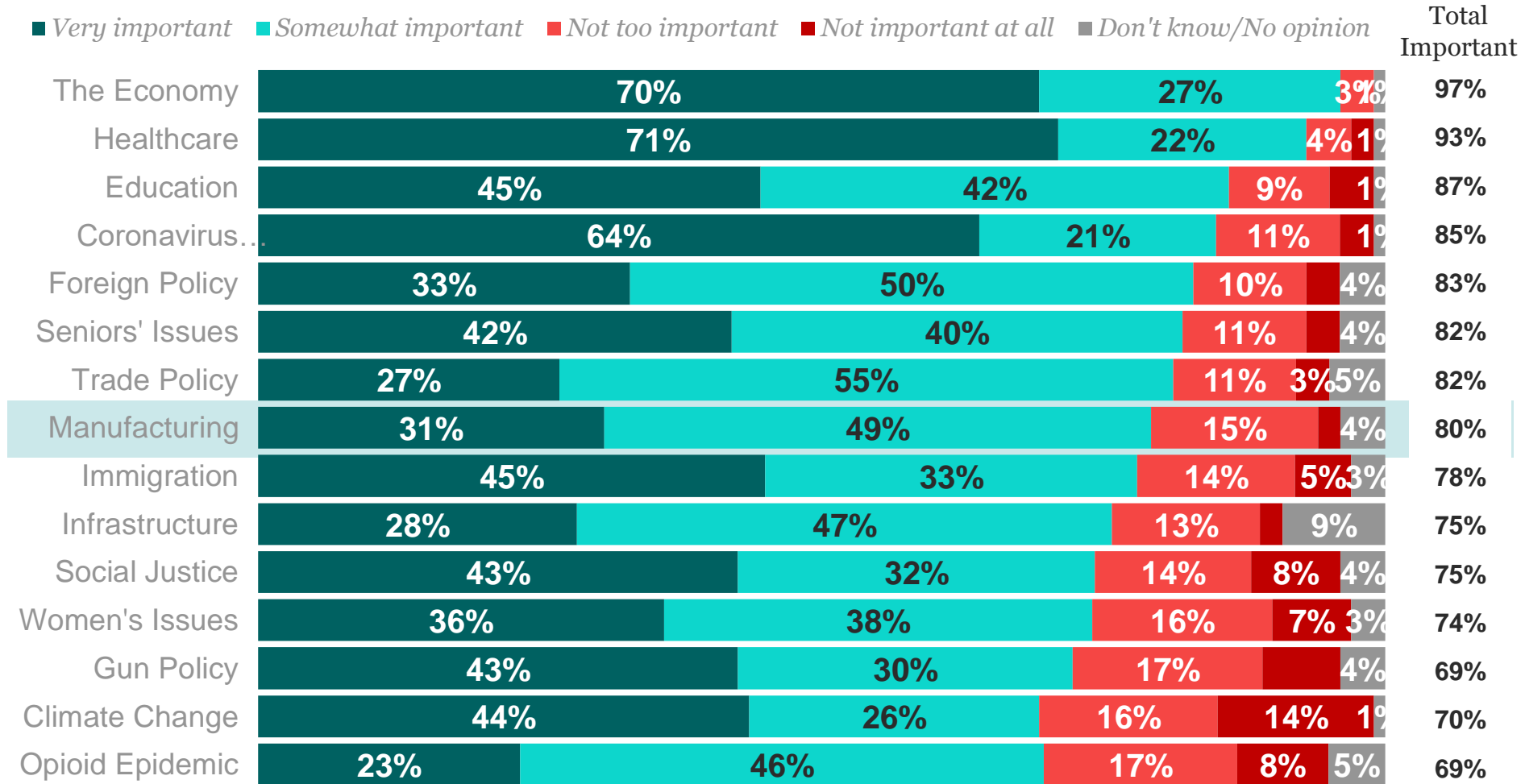
Top Issues in 2020

Wisconsin Registered
Voters

Perceived importance of manufacturing issues has risen among Wisconsin voters since January, from 76% to 80% *total importance*.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

Wisconsin Registered Voters



Ranked by "Total Important"

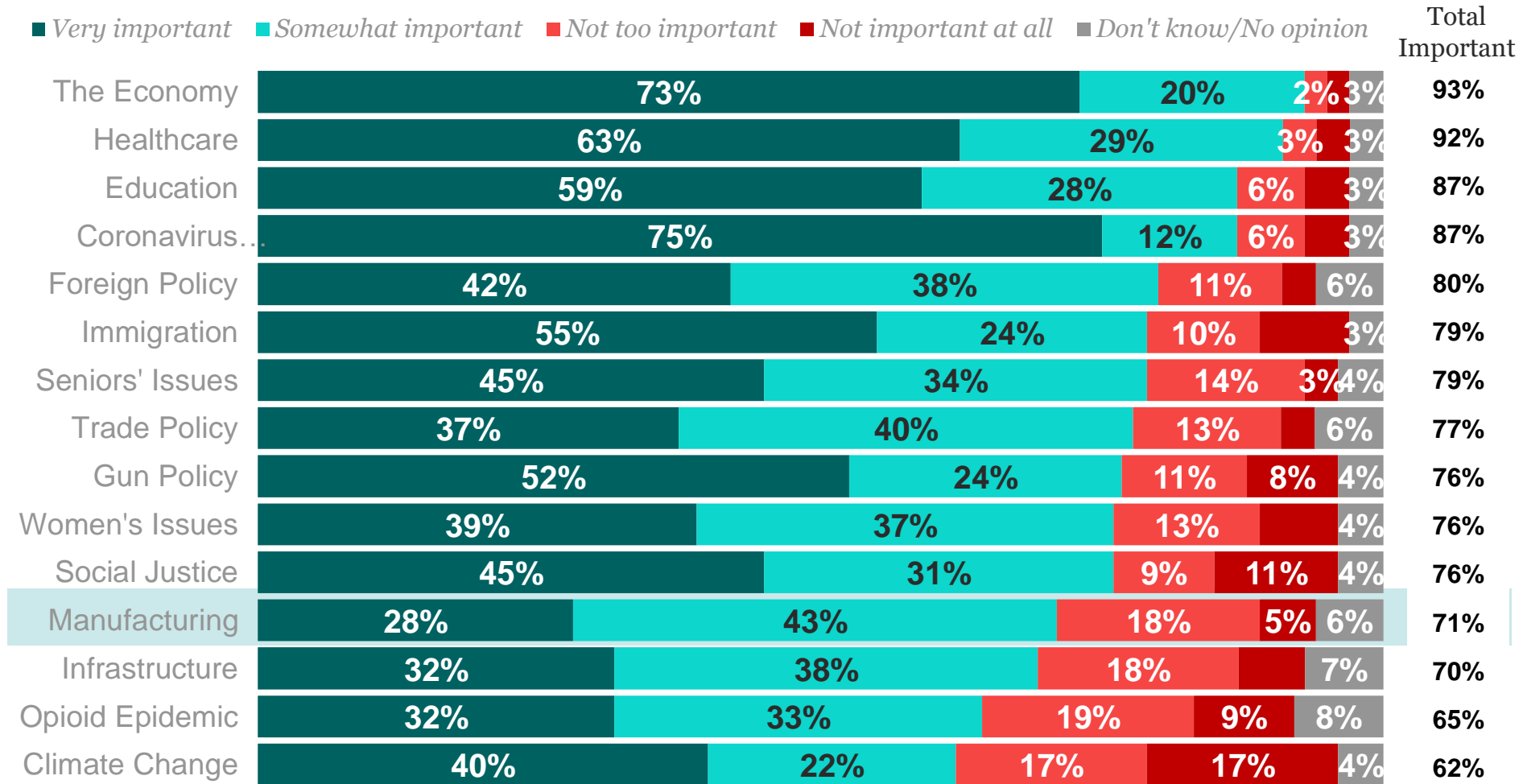
JULY 2020

Top Issues
in 2020
Texas Registered
Voters

Manufacturing is rated lowest in *total importance* among Texas voters than those in any other state oversampled – 71%. Covid-19 was rated by 75% of Texans as *very important*, more than any other issue.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president?

Texas Registered Voters



Ranked by "Total Important"

*There was no state oversample for Texas in January 2020.

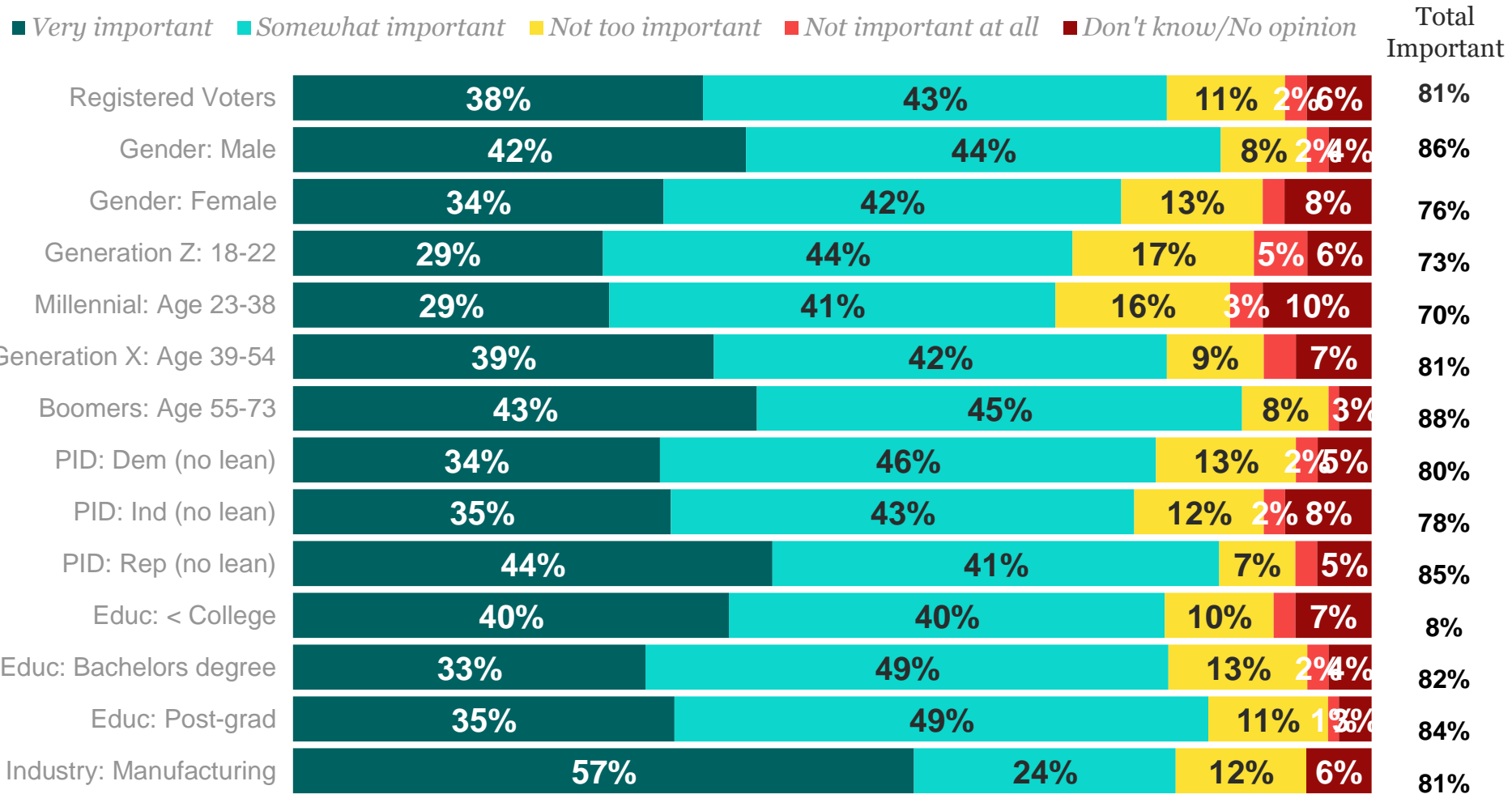
Top Issues in 2020

U.S. Registered Voters

Republicans, older generations (age 39+), men, and those without a college degree see issues related to manufacturing as particularly salient in terms of evaluating presidential candidates.

Thinking about the 2020 presidential election, how important are each of the following issue areas when casting your vote for president? /// **Manufacturing**

U.S. Registered Voters



Contents



Top Issues in 2020



The State of Manufacturing



**The Politics and Policies of
Manufacturing**

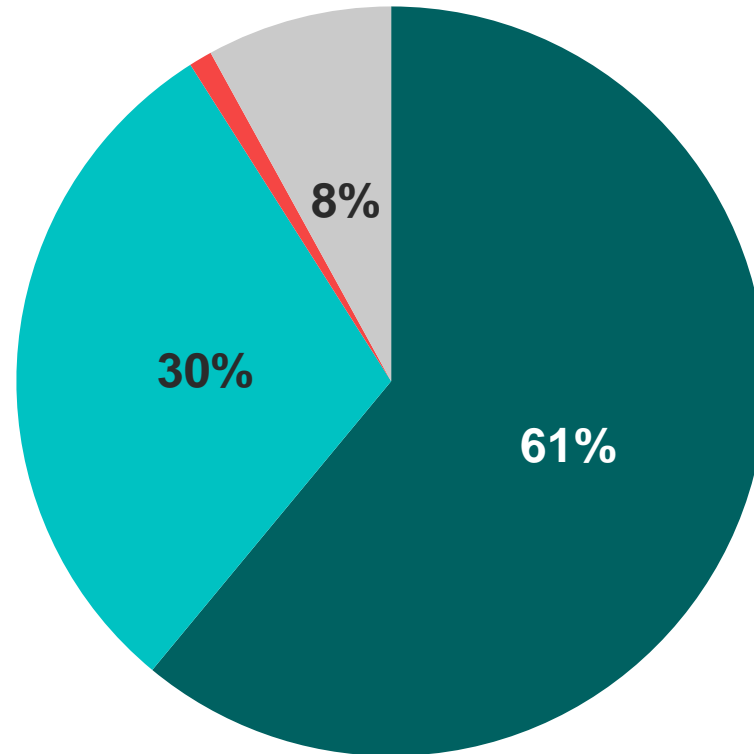
Compared to January 2020, 8% more registered voters view the role of manufacturing as *critical* to the U.S. economy. The share of voters that believe manufacturing is *not important* has remained stable.

In thinking about the role of manufacturing in the U.S. economy, which of the following comes closest to your view?

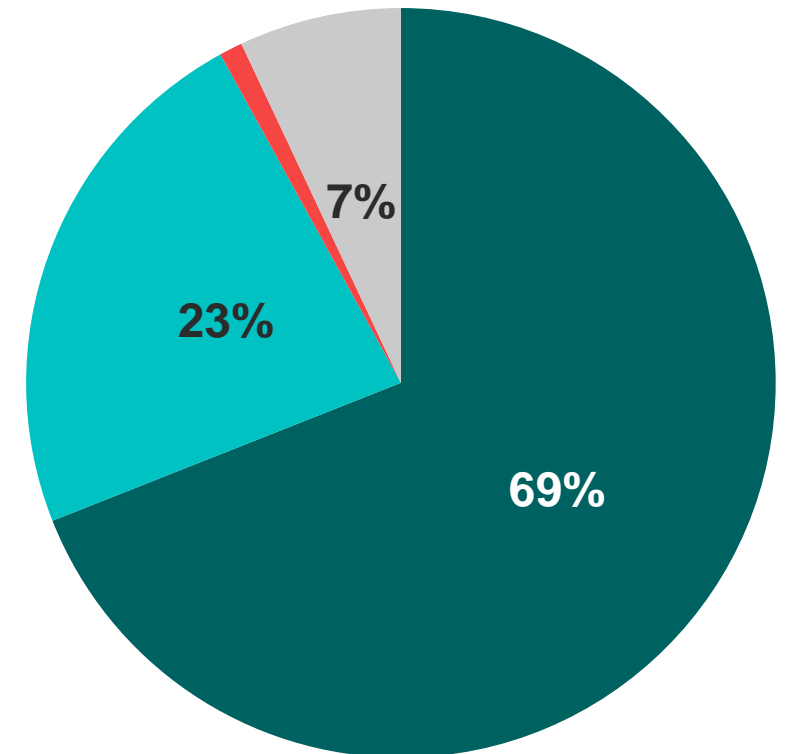
U.S. Registered Voters

- Critical to the U.S. economy
- Important, but not critical to the U.S. economy
- Not important at all to the U.S. economy
- Don't know/No opinion

January 2020



July 2020



The State of
Manufacturing
U.S. Registered Voters

JAN 2020

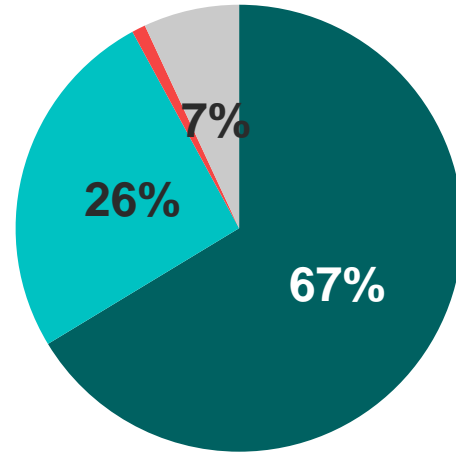
The State of Manufacturing

State-Specific Registered Voters

Across all state oversamples, the critical role manufacturing plays in the economy was recognized in responses to the January survey.

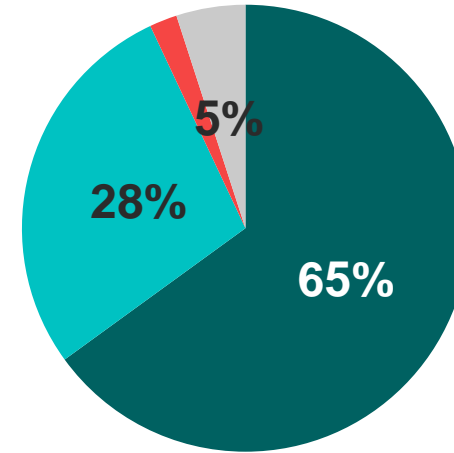
In thinking about **the role of manufacturing in the U.S. economy**, which of the following comes closest to your view?

Michigan Registered Voters



- Manufacturing is critical to the U.S. economy
- Manufacturing is important, but not critical to the U.S. economy
- Manufacturing is not important at all to the U.S. economy
- Don't know/No opinion

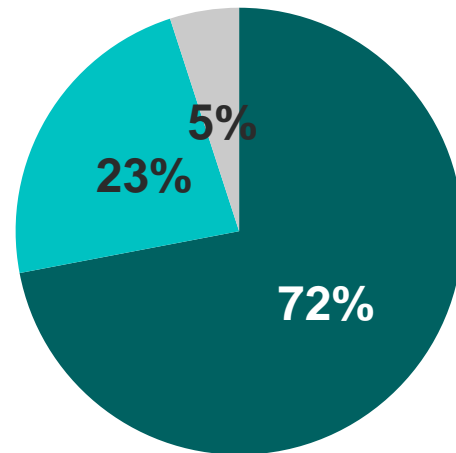
Ohio Registered Voters



- Manufacturing is critical to the U.S. economy
- Manufacturing is important, but not critical to the U.S. economy
- Manufacturing is not important at all to the U.S. economy
- Don't know/No opinion

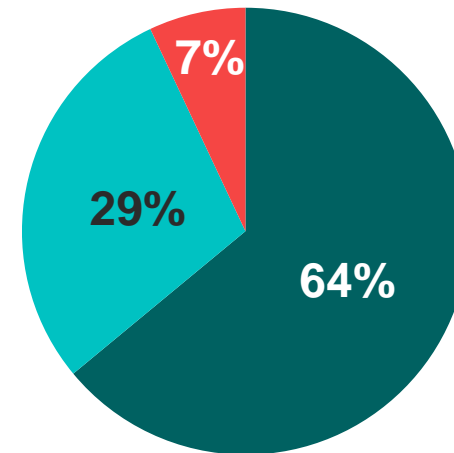
- Manufacturing is critical to the U.S. economy
- Manufacturing is important, but not critical to the U.S. economy
- Manufacturing is not important at all to the U.S. economy
- Don't know/No opinion

Pennsylvania Registered Voters



- Manufacturing is critical to the U.S. economy
- Manufacturing is important, but not critical to the U.S. economy
- Manufacturing is not important at all to the U.S. economy
- Don't know/No opinion

Wisconsin Registered Voters



- Manufacturing is critical to the U.S. economy
- Manufacturing is important, but not critical to the U.S. economy
- Manufacturing is not important at all to the U.S. economy
- Don't know/No opinion

- Manufacturing is critical to the U.S. economy
- Manufacturing is important, but not critical to the U.S. economy
- Manufacturing is not important at all to the U.S. economy
- Don't know/No opinion

JULY 2020

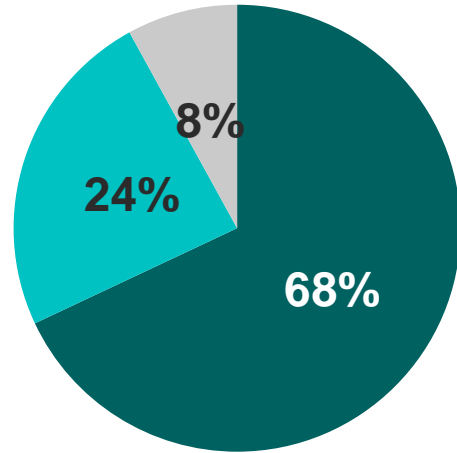
The State of Manufacturing

State-Specific Registered Voters

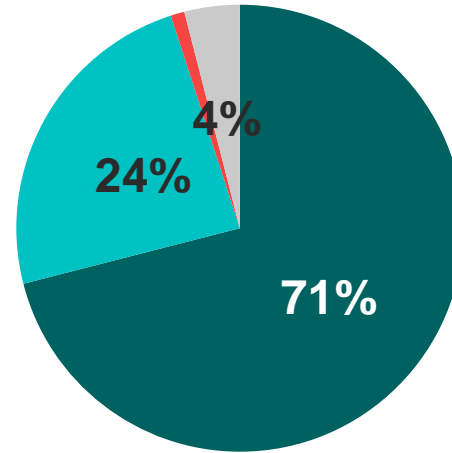
Perceptions of manufacturing as *critical* to the U.S. economy is down 4% from January in Ohio and Wisconsin, while increasing 5% in Pennsylvania during that time.

In thinking about **the role of manufacturing in the U.S. economy**, which of the following comes closest to your view?

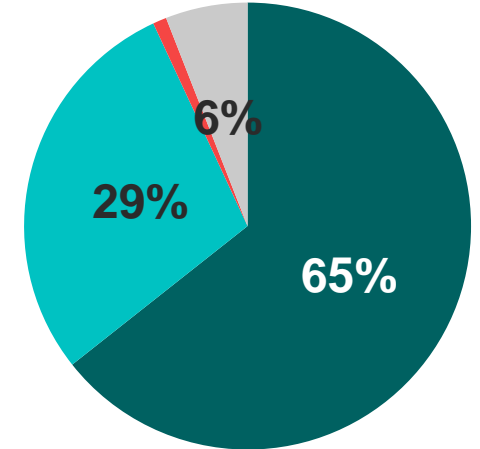
Michigan Registered Voters



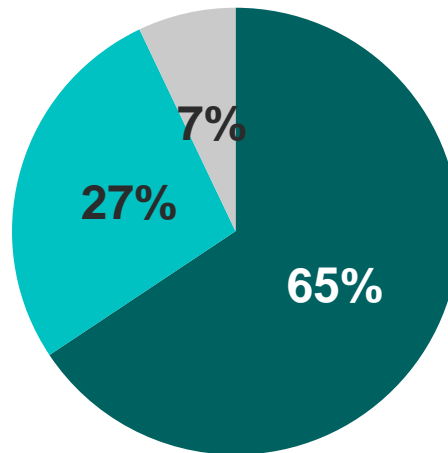
Ohio Registered Voters



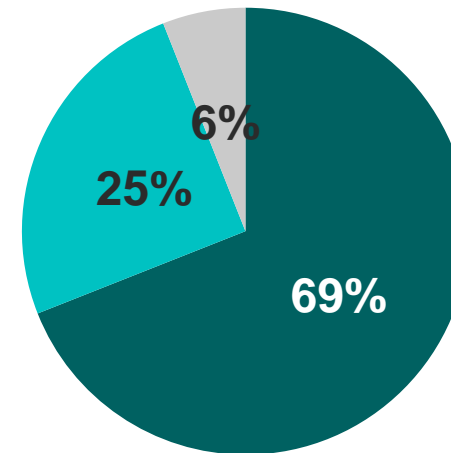
Pennsylvania Registered Voters



Texas Registered Voters



Wisconsin Registered Voters



- Manufacturing is critical to the U.S. economy
- Manufacturing is important, but not critical to the U.S. economy
- Manufacturing is not important at all to the U.S. economy
- Don't know/No opinion

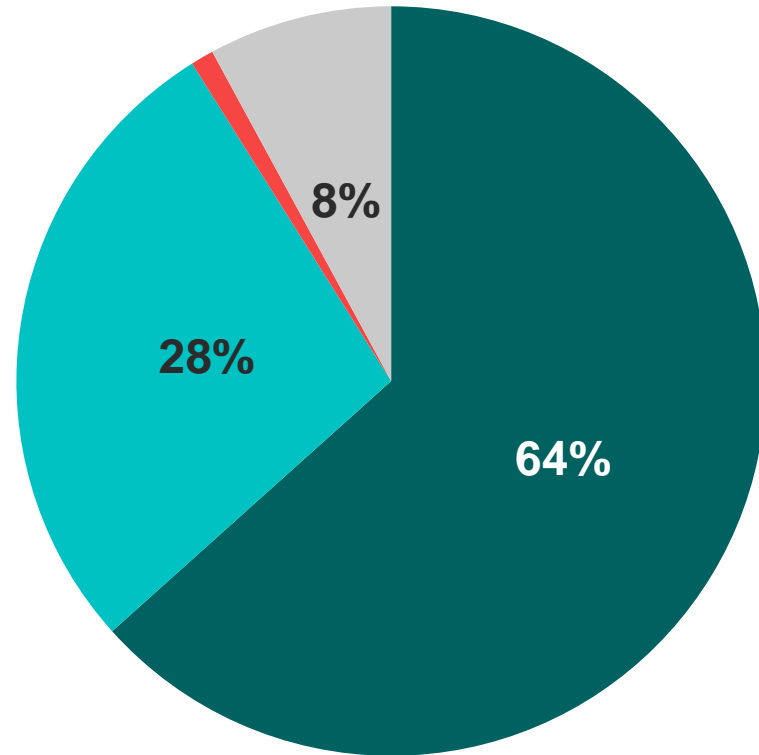
Similar to the public's views on the role of manufacturing on the U.S. economy, the share of those describing the industry as *critical* to the country's job market has increased 5% since January.

And, in thinking about the role of manufacturing in the U.S. job market, which of the following comes closest to your view?

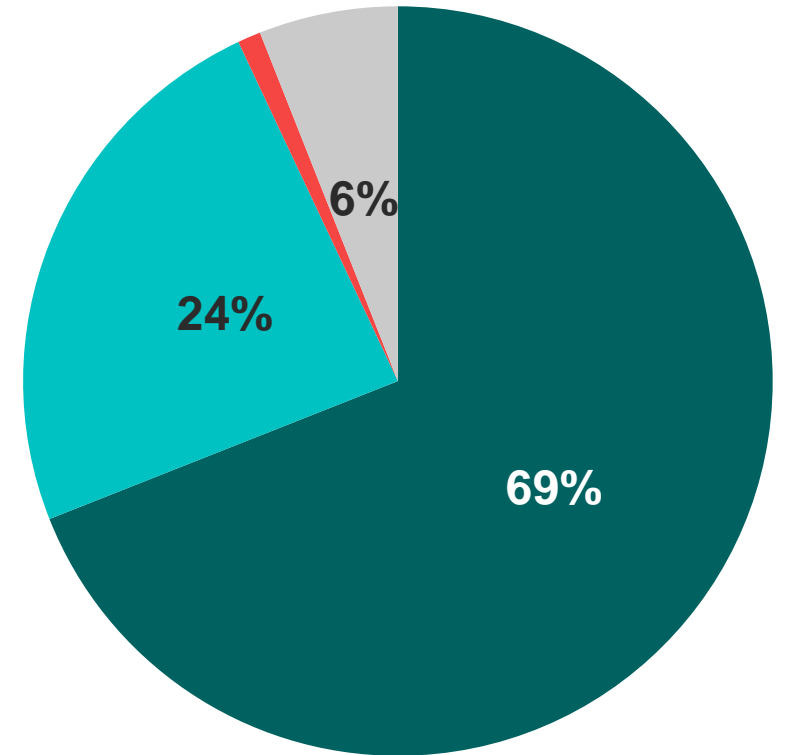
U.S. Registered Voters

- Critical to the U.S. job market
- Important, but not critical to the U.S. job market
- Not important at all to the U.S. job market
- Don't know/No opinion

January 2020



July 2020



The State of
Manufacturing
U.S. Registered Voters

JAN 2020

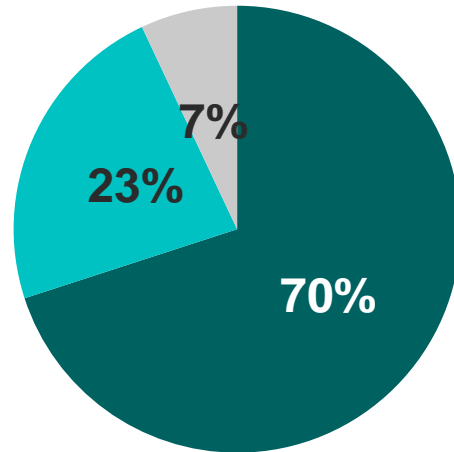
The State of Manufacturing

State-Specific
Registered Voters

In January, 0% of Michigan, Pennsylvania, and Wisconsin voters believed that “manufacturing is *not important at all* to the U.S. job market.” In Ohio, that selection was just 2%.

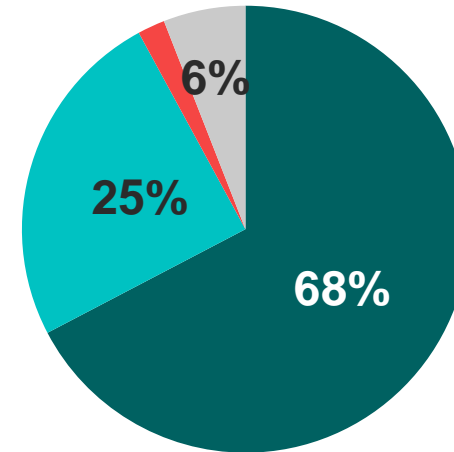
And, in thinking about the role of manufacturing in the U.S. job market, which of the following comes closest to your view?

Michigan Registered Voters



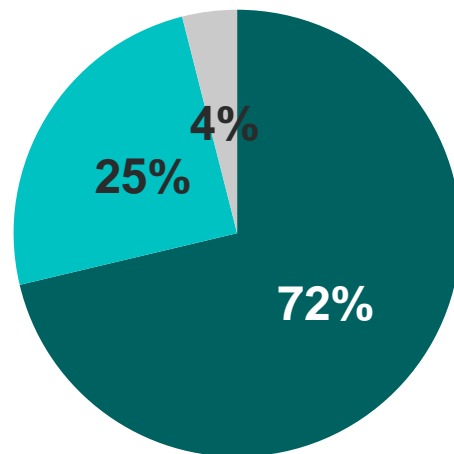
- Manufacturing is critical to the U.S. job market
- Manufacturing is important, but not critical to the U.S. job market
- Manufacturing is not important at all to the U.S. job market
- Don't know/No opinion

Ohio Registered Voters



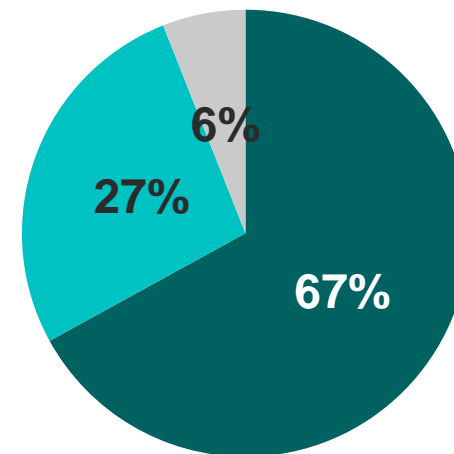
- Manufacturing is critical to the U.S. job market
- Manufacturing is important, but not critical to the U.S. job market
- Manufacturing is not important at all to the U.S. job market
- Don't know/No opinion

Pennsylvania Registered Voters



- Manufacturing is critical to the U.S. job market
- Manufacturing is important, but not critical to the U.S. job market
- Manufacturing is not important at all to the U.S. job market
- Don't know/No opinion

Wisconsin Registered Voters



- Manufacturing is critical to the U.S. job market
- Manufacturing is important, but not critical to the U.S. job market
- Manufacturing is not important at all to the U.S. job market
- Don't know/No opinion

JULY 2020

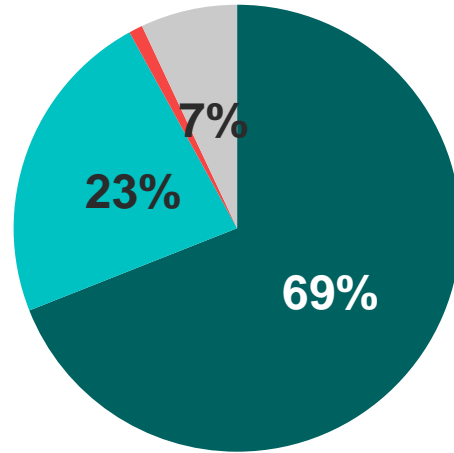
The State of Manufacturing

State-Specific Registered Voters

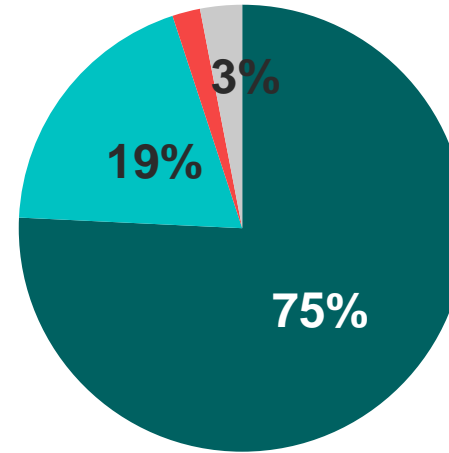
Similar to January, low percentages of voters believe that “manufacturing is *not important at all* to the U.S. job market” when asked in July. In Ohio, more voters are now saying manufacturing is *critical to the U.S. job market*.

And, in thinking about the role of manufacturing in the U.S. job market, which of the following comes closest to your view?

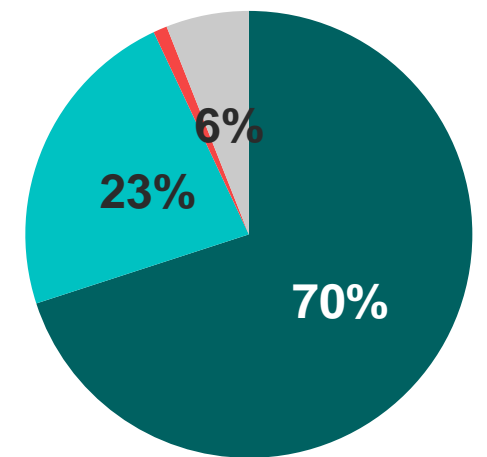
Michigan Registered Voters



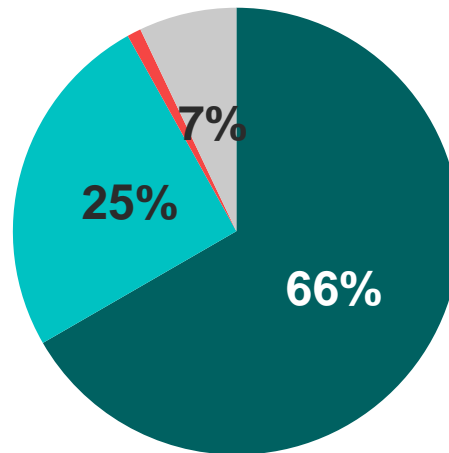
Ohio Registered Voters



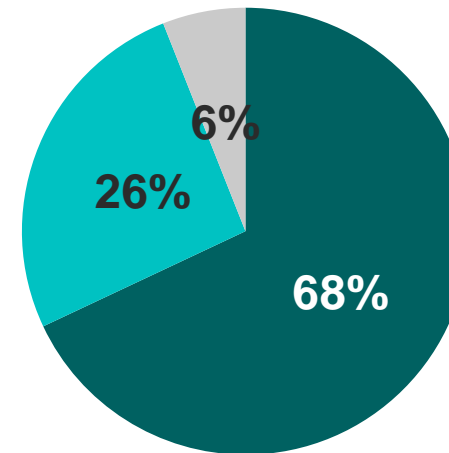
Pennsylvania Registered Voters



Texas Registered Voters



Wisconsin Registered Voters

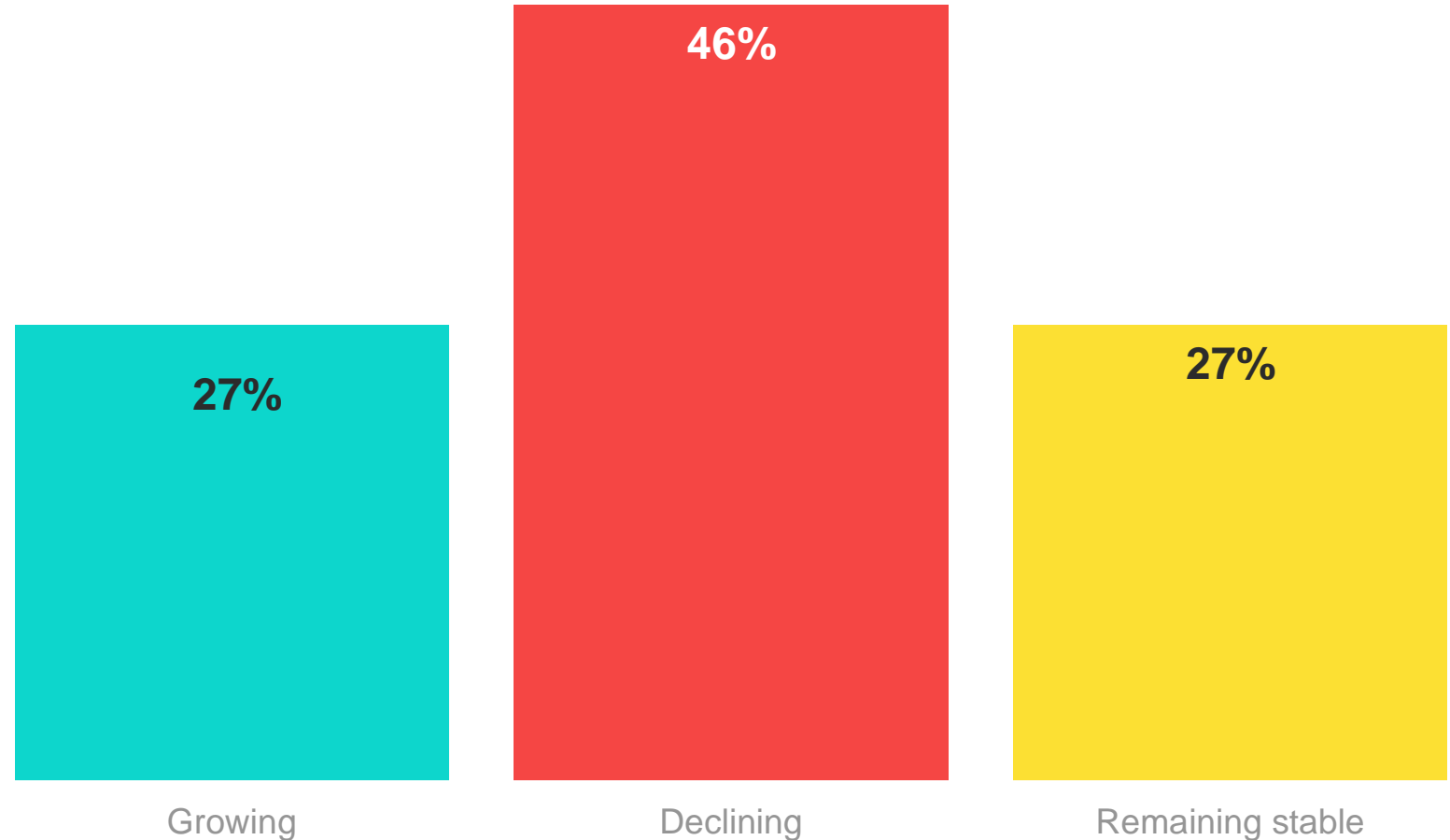


- Manufacturing is critical to the U.S. job market
- Manufacturing is important, but not critical to the U.S. job market
- Manufacturing is not important at all to the U.S. job market
- Don't know/No opinion

Public opinion on the scale of domestic manufacturing in the U.S. is relatively unchanged compared to January 2020, with 46% seeing it as a sector in decline.

Do you believe that manufacturing in the U.S. is a growing sector, a declining sector, or is it remaining stable?

U.S. Registered Voters



The State of Manufacturing

U.S. Registered Voters

The State of Manufacturing

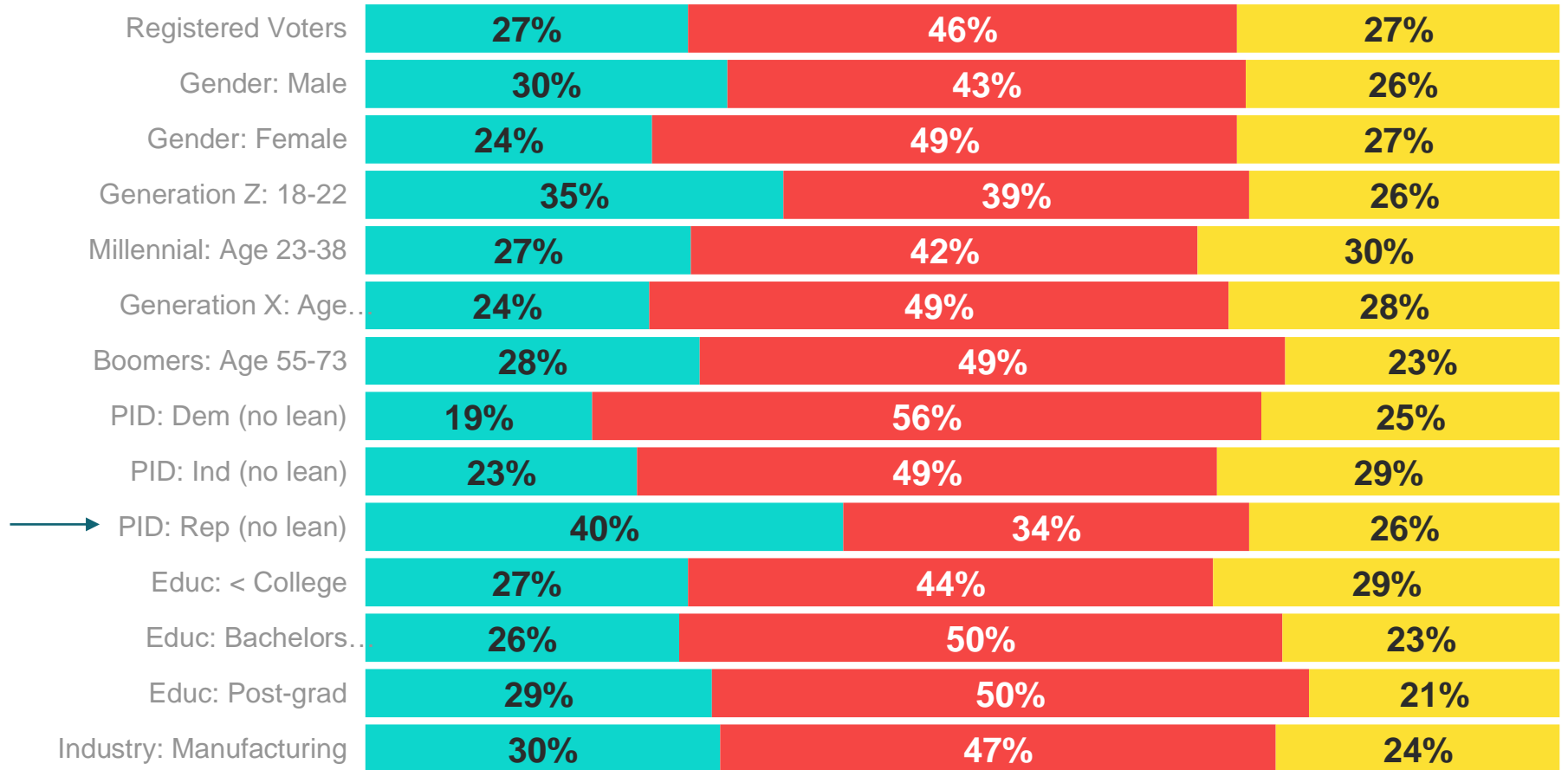
U.S. Registered Voters

Republicans are unique from other demographic groups in that the plurality (40%) of party members believe manufacturing in the U.S. is a *growing sector*.

Do you believe that manufacturing in the U.S. is a growing sector, a declining sector, or is it remaining stable?

U.S. Registered Voters

■ Growing ■ Declining ■ Remaining stable



JAN 2020

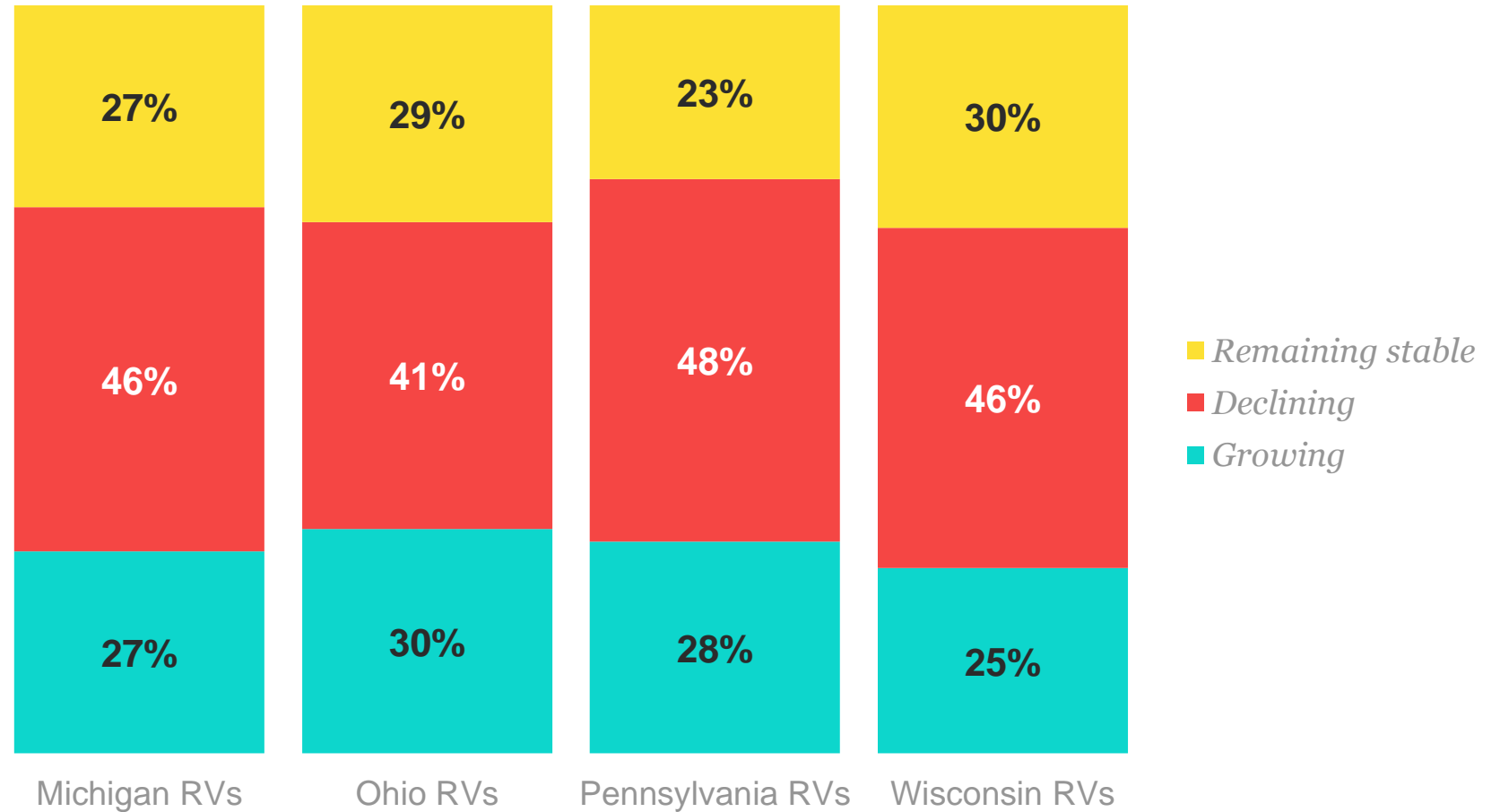
The State of Manufacturing

State-Specific Registered Voters

In January, a plurality of registered voters in Michigan, Ohio, Pennsylvania, and Wisconsin saw manufacturing in the U.S. as a *declining industry*.

Do you believe that manufacturing in the U.S. is a growing sector, a declining sector, or is it remaining stable?

State-Specific Registered Voters



JULY 2020

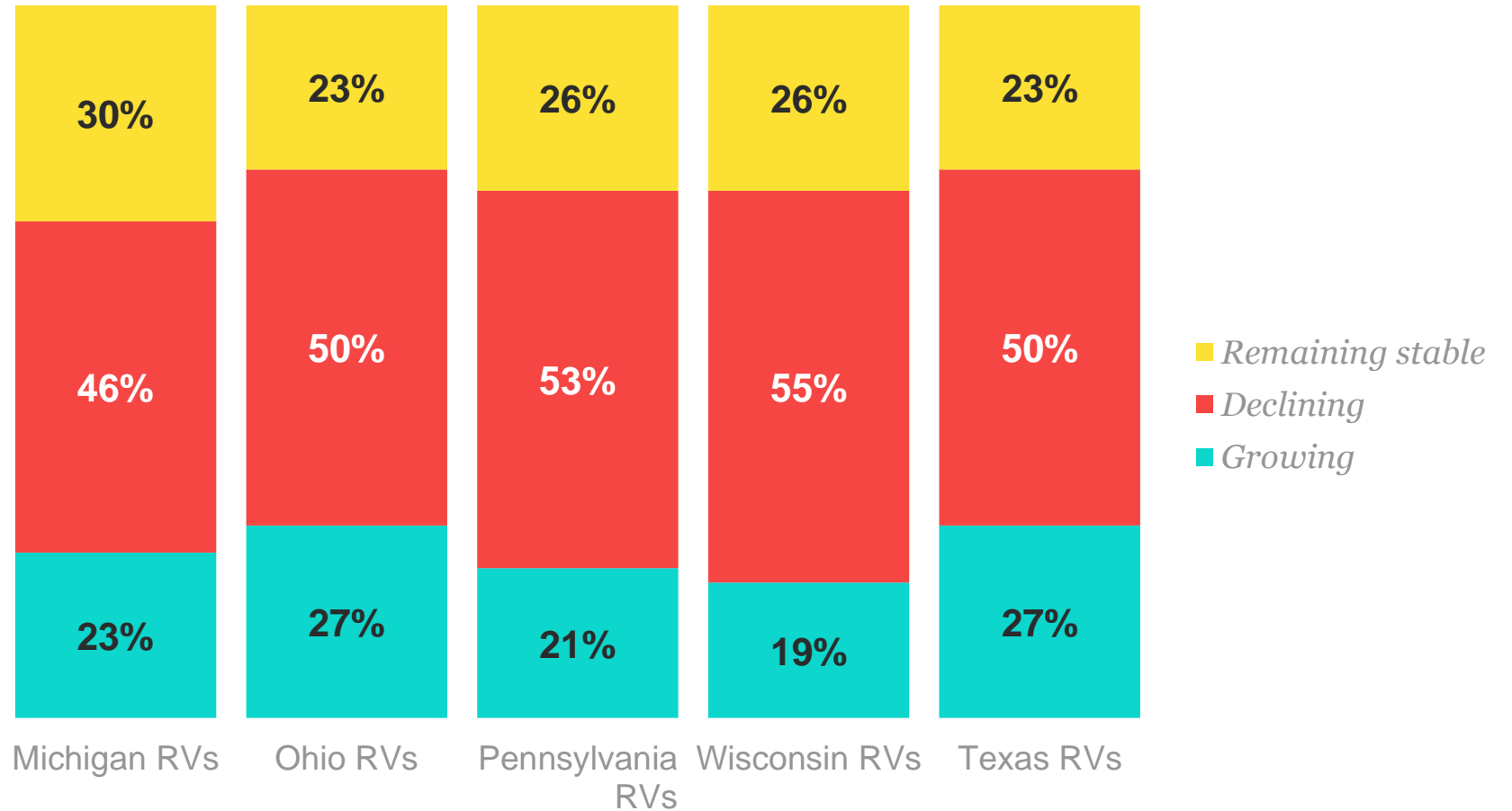
The State of Manufacturing

State-Specific Registered Voters

In July, more voters across select states believe that manufacturing is declining than growing or remaining stable.

Do you believe that manufacturing in the U.S. is a growing sector, a declining sector, or is it remaining stable?

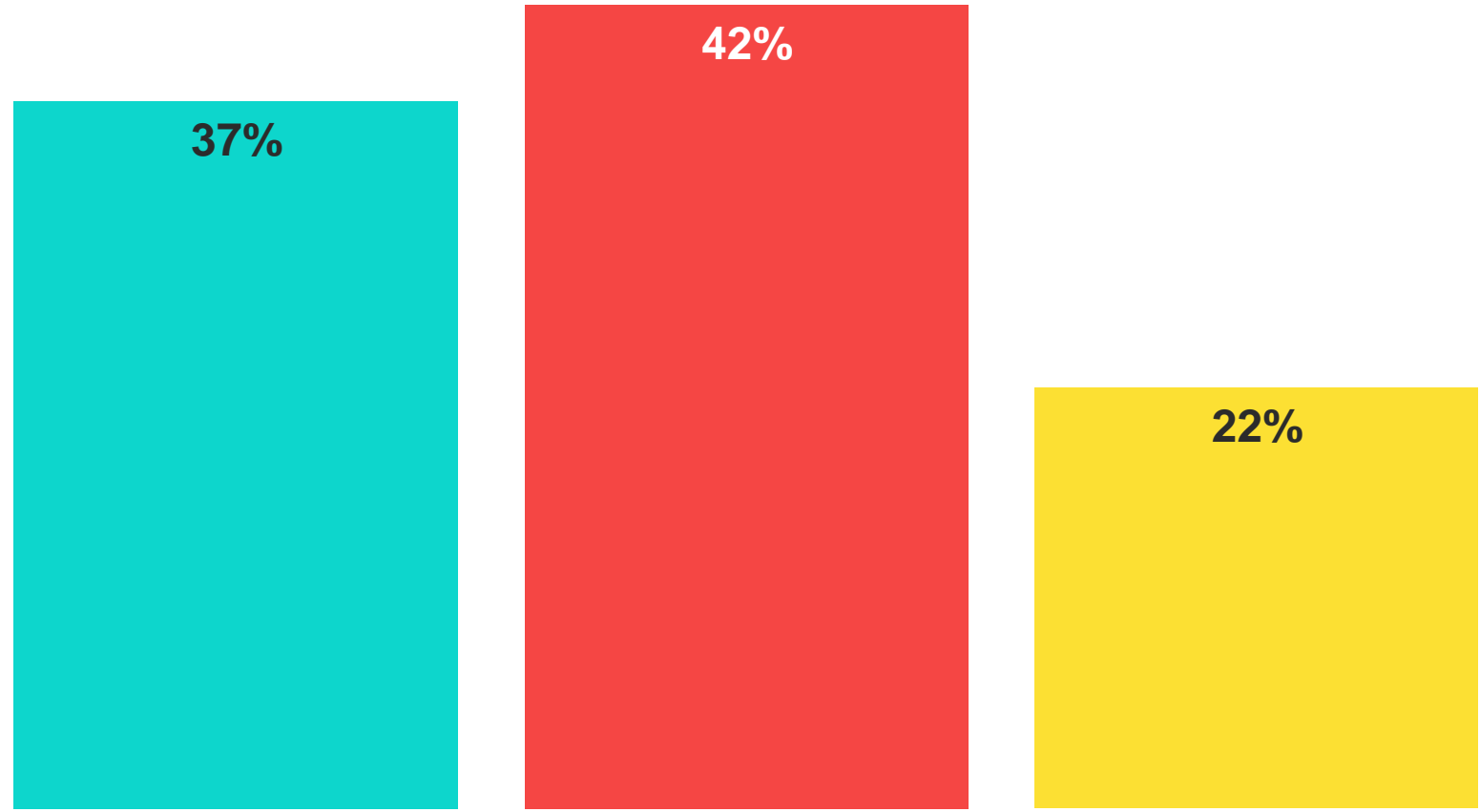
State-Specific Registered Voters



The public's outlook on the future of manufacturing jobs in the U.S. is more positive now than in January, with 5% more registered voters expecting the number of manufacturing jobs to increase in the next five years.

Thinking about jobs in manufacturing, do you think there will be more or less jobs in manufacturing in the next 5 years, or will the job market remain stable?

U.S. Registered Voters



More jobs

Less jobs

Remain stable

The State of Manufacturing

U.S. Registered Voters

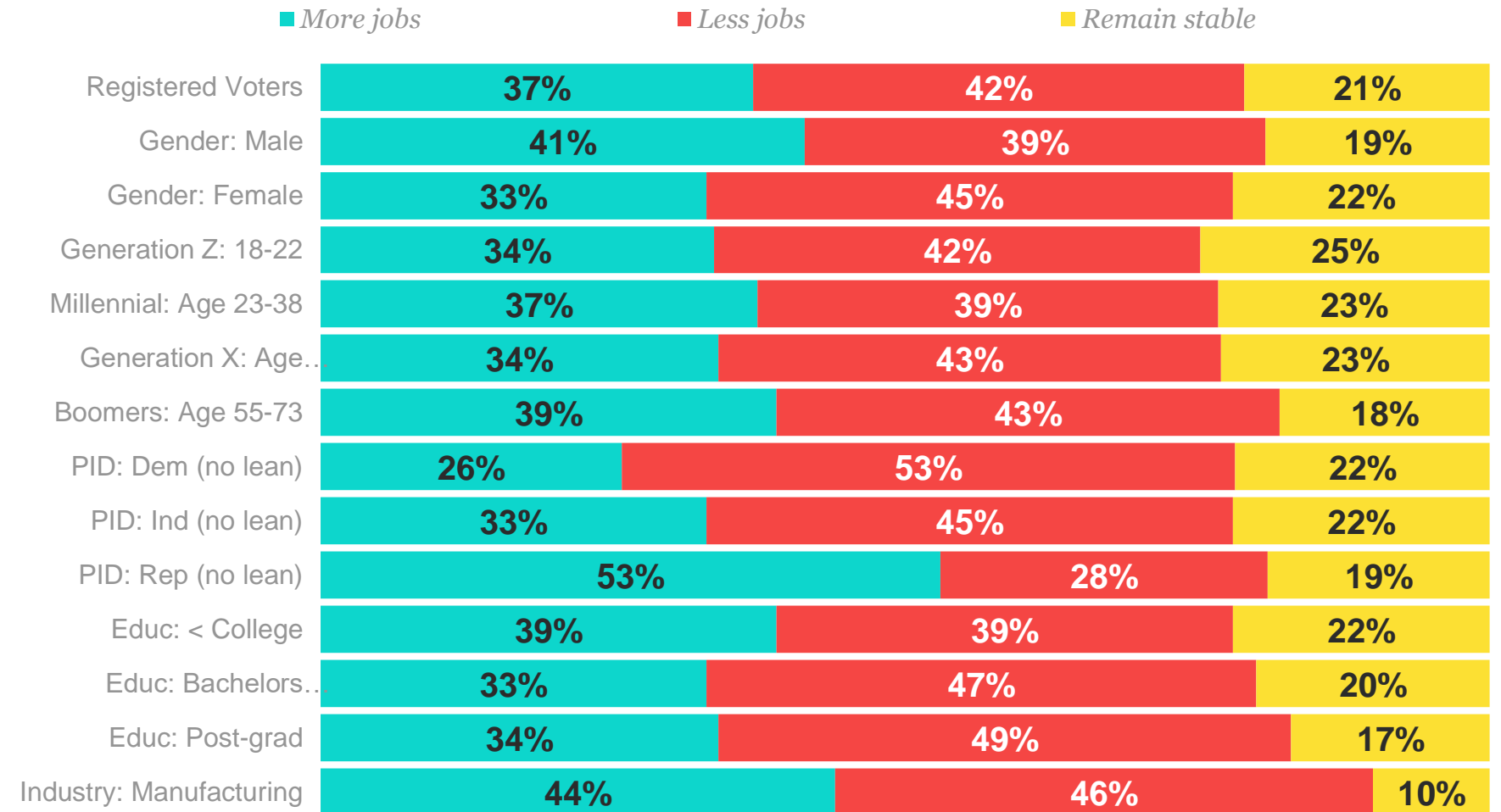
The State of Manufacturing

U.S. Registered Voters

Republicans and those in the manufacturing industry stand out among other groups for the shares among them believing the number of jobs in the industry will increase in the next five years.

Thinking about jobs in manufacturing, do you think there will be more or less jobs in manufacturing in the next 5 years, or will the job market remain stable?

U.S. Registered Voters



JAN 2020

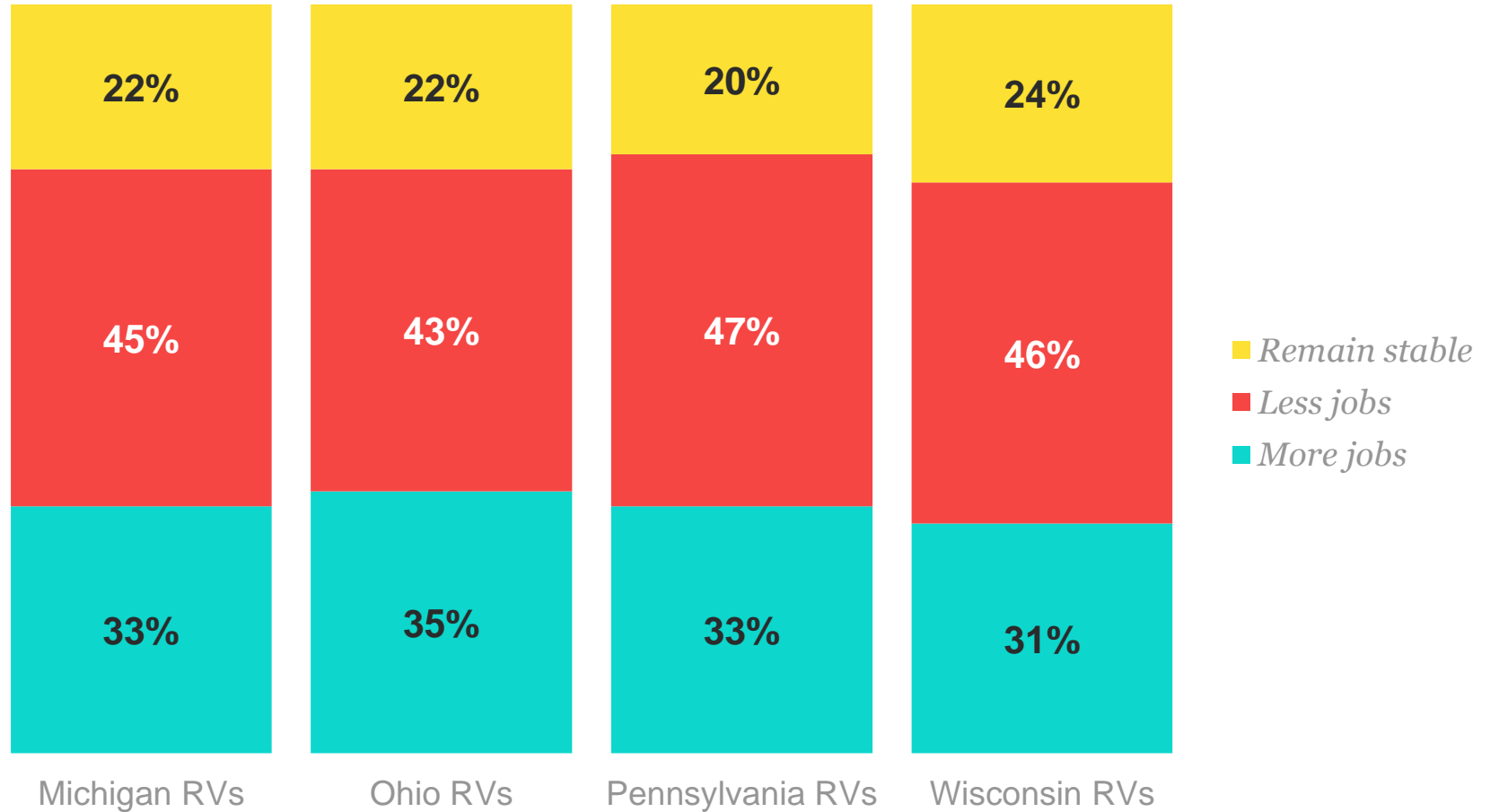
The State of Manufacturing

State-Specific Registered Voters

In January, more Michigan, Ohio, Pennsylvania, and Wisconsin voters believed there would be less manufacturing jobs in five years than those that believed there would be more jobs in five years.

Thinking about jobs in manufacturing, do you think there will be more or less jobs in manufacturing in the next 5 years, or will the job market remain stable?

State-Specific Registered Voters



JULY 2020

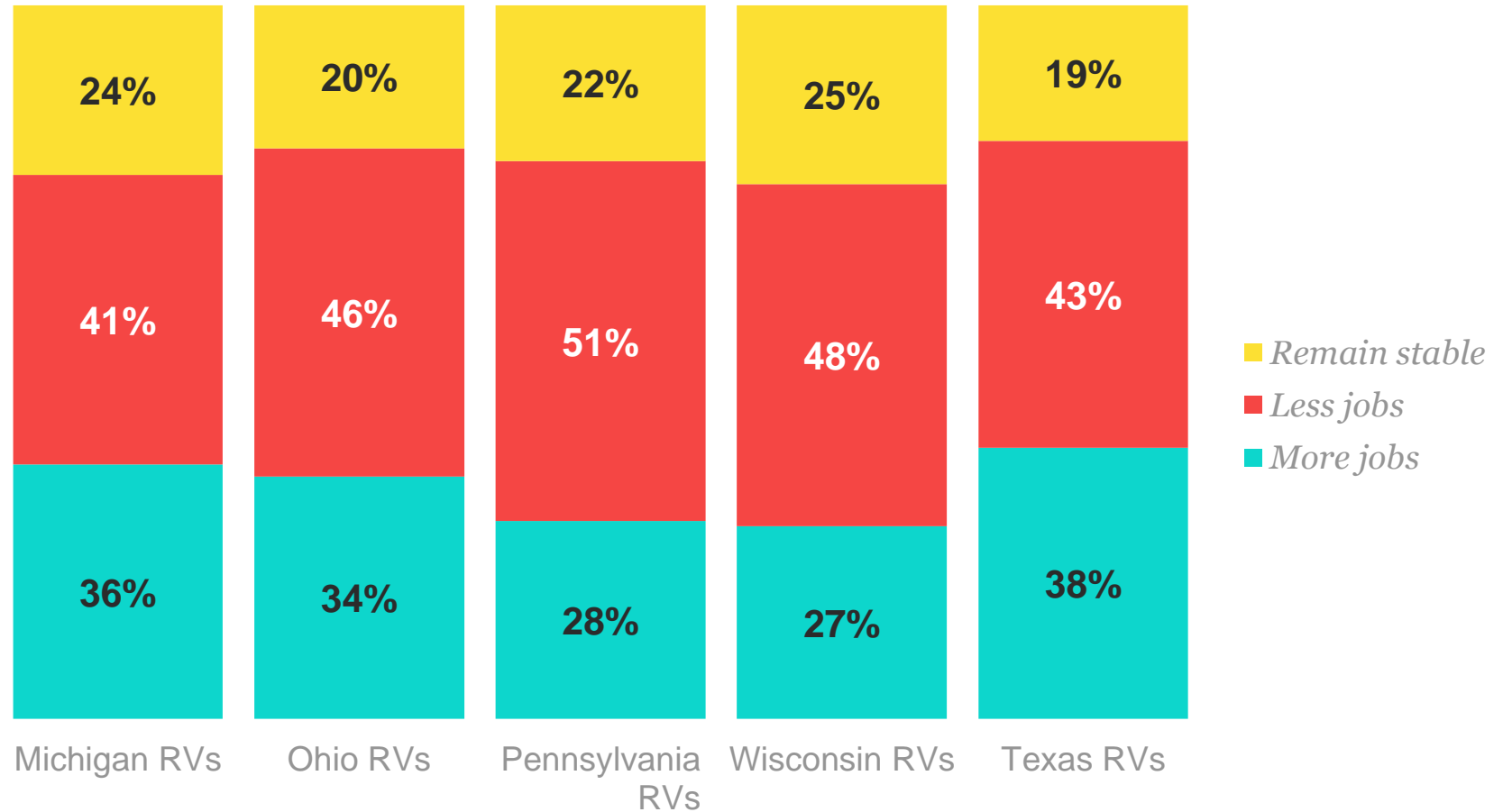
The State of Manufacturing

State-Specific Registered Voters

Sentiment in July is similar to January- more voters believe there will be less jobs in five years than believe there will be more jobs in five years.

Thinking about jobs in manufacturing, do you think there will be more or less jobs in manufacturing in the next 5 years, or will the job market remain stable?

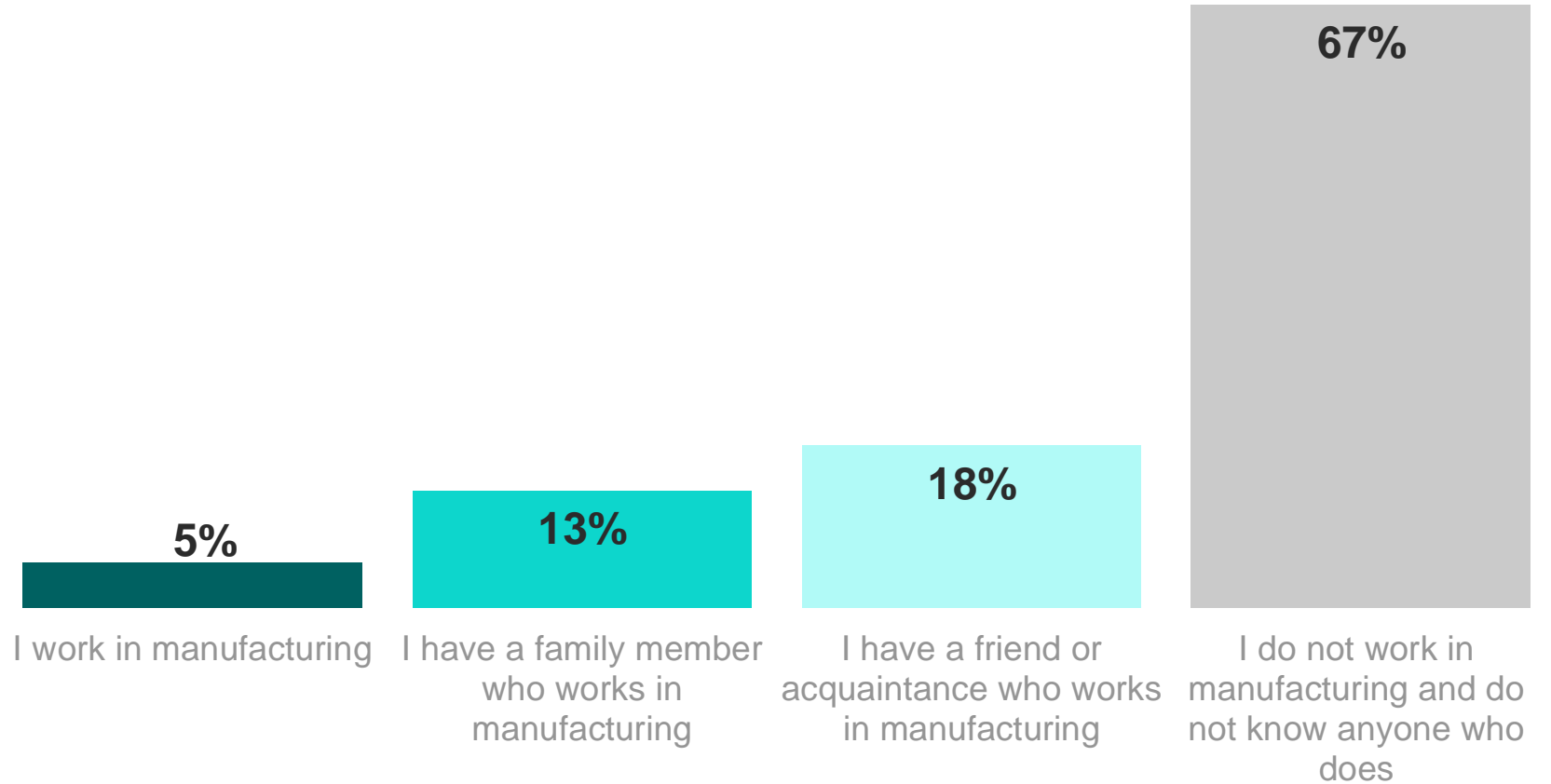
State-Specific Registered Voters



Nationally, 5% of survey respondents report personally working in manufacturing. Nearly one-third (31%) have a friend or family member working in the industry.

Do you or does anyone you know work in manufacturing? **Select all that apply.**

U.S. Registered Voters



Answer choices were not exclusive, so percentages do not sum to 100.

The State of Manufacturing

U.S. Registered Voters

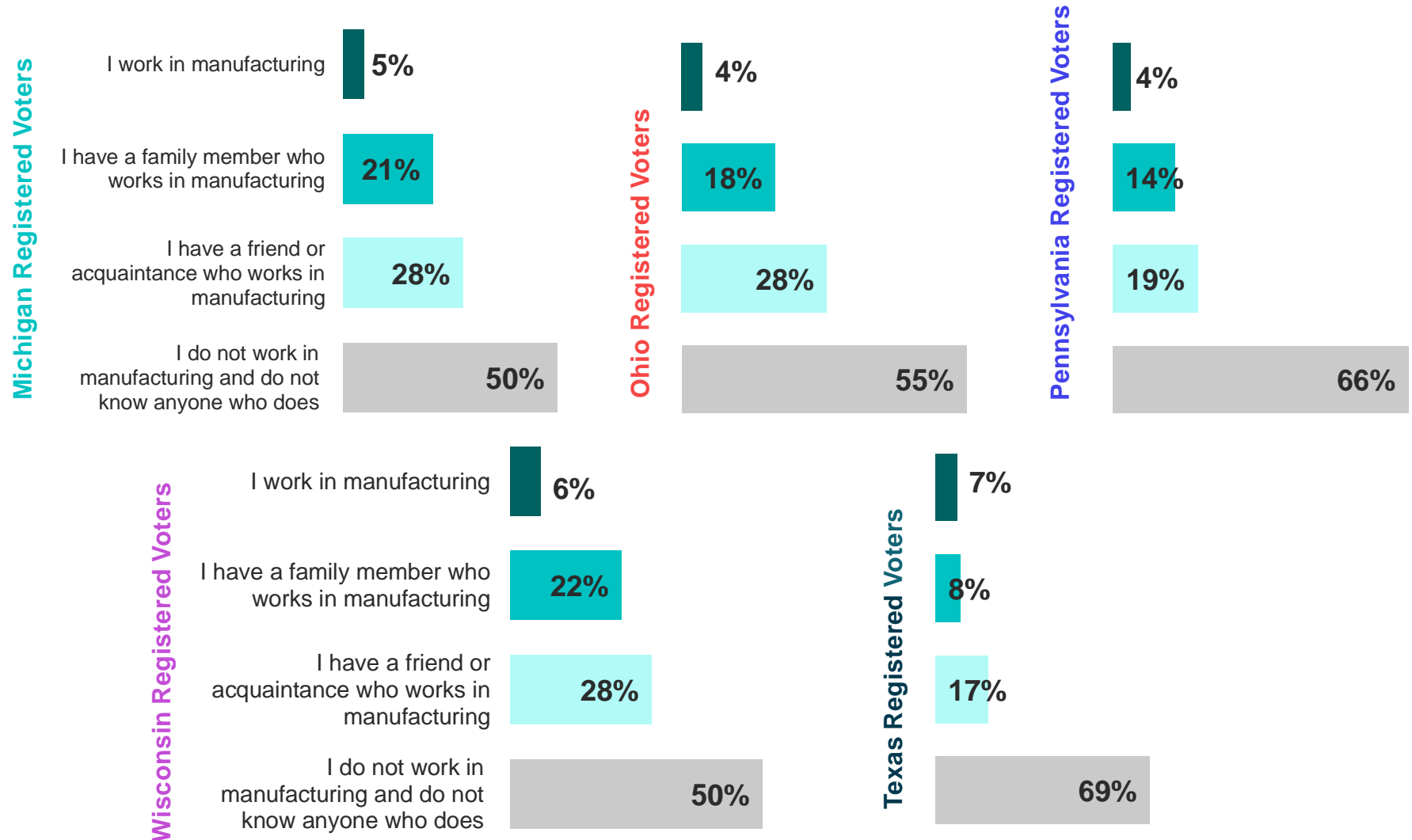
JULY 2020

The State of Manufacturing

State-Specific Registered Voters

In Michigan, Ohio, and Wisconsin the percentage of voters who personally work in manufacturing or who know people who work in manufacturing is 10 percentage points+ higher than the national sample.

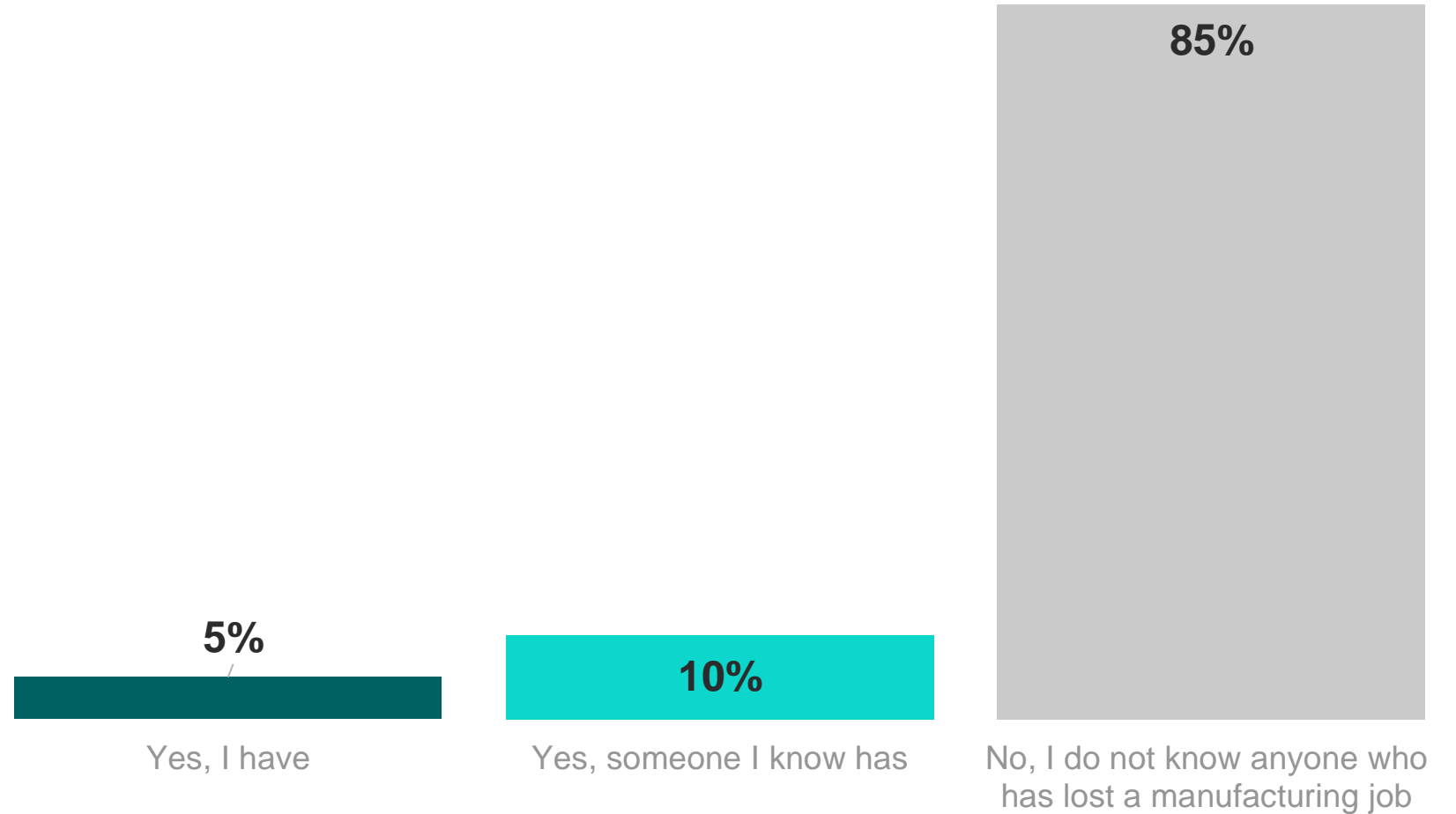
Do you or does anyone you know work in manufacturing? Select all that apply.



Nationally, 15% of voters have either personally lost a job in manufacturing or know someone who has.

Have you or has someone you know recently lost a manufacturing job? Select all that apply.

U.S. Registered Voters



The State of Manufacturing

U.S. Registered Voters

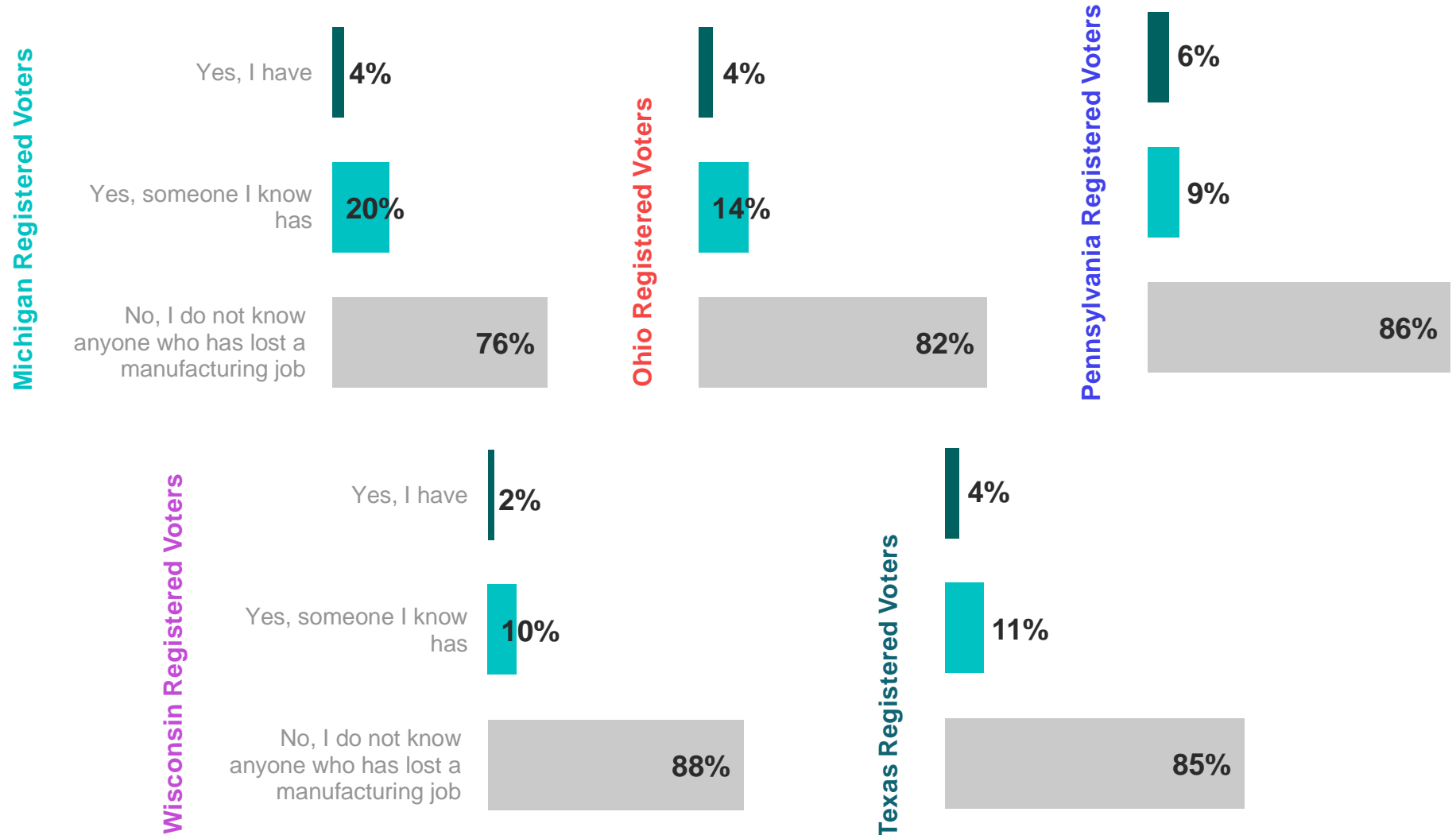
JULY 2020

The State of Manufacturing

State-Specific
Registered Voters

And, more voters in these select states report being personally affected or knowing someone who has been affected by a job loss in manufacturing.

Have you or has someone you know recently lost a manufacturing job? Select all that apply.



Top Issues in 2020

Michigan Registered
Voters

While Covid-19 is by far the most frequently cited reason for job loss, other common themes included automation of work, outsourcing of jobs, and key industries (i.e. automotive in the Midwest) underperforming or cutting costs.

What was the reason you or someone you know lost their job in manufacturing?

United States RVs

- “Reduction of personnel due to Covid-19”
- “Family members were diagnosed with Covid-19, company had to let him go”
- “Government shutdowns making companies go broke”
- “Outsourcing to another country”
- “Replaced by automation”

Pennsylvania RVs

- “Company shifted production from the United States to Viet Nam. This was associated with a substantial reduction in labor costs.”
- “Laid off because of horrible lock downs”
- “Lost job due to covid19 and losing contract.”
- “THE COVID VIRUS”
- “Production moved to Mexico”

Michigan RVs

- “COVID down sizing”
- “Because their job went to freaking Mexico!!”
- “The governor shut down businesses and they couldn’t survive the shutdown”
- “More machines are taking over and it costs less to hire actual workers”
- “The big 3 not producing”

Texas RVs

- “The company moved its manufacturing out of the USA.”
- “Due to the virus. Loss of demand”
- “The plant was considered non essential”
- “Disciplinary action”
- “Laid off due to the coronavirus.”
- “Because of the pandemic”

Ohio RVs

- “Due to covid”
- “My uncle lost his job when Covid 19 hit.”
- “Lay off from stupid virus”
- “Job went over seas”
- “Automotive industry was declining”
- “The company moved my job to Mexico”

Wisconsin RVs

- “Closing of facility and operations. Another was due to covid-19.”
- “China flu”
- “The industry hit a decline and COVID decreased jobs by multitudes.”
- “Lay off due to lack of sales”
- “Her particular job was going to be handled in a foreign country”

All responses are verbatim as-entered by respondents.

Contents

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Top Issues in 2020

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The State of Manufacturing

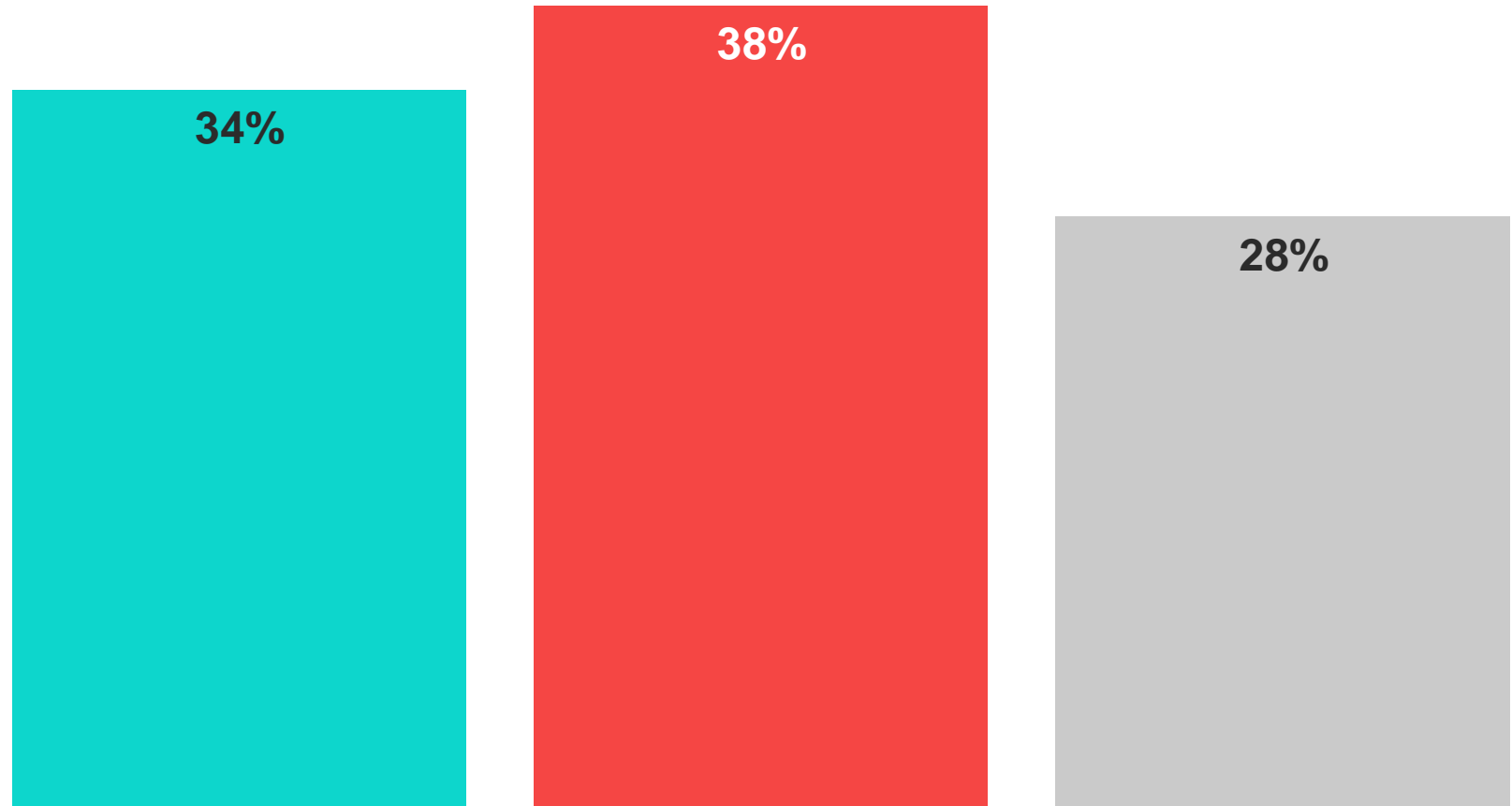
3

The Politics and Policies of
Manufacturing

While 2% more registered voters see the Republican Party as the historic champion of the manufacturing industry than in January, opinion on that front is more or less unchanged.

Historically, which political party do you believe has been a better champion for manufacturing?

U.S. Registered Voters



The Democratic Party

The Republican Party

Don't know/No opinion

The Politics + Policies of Manufacturing

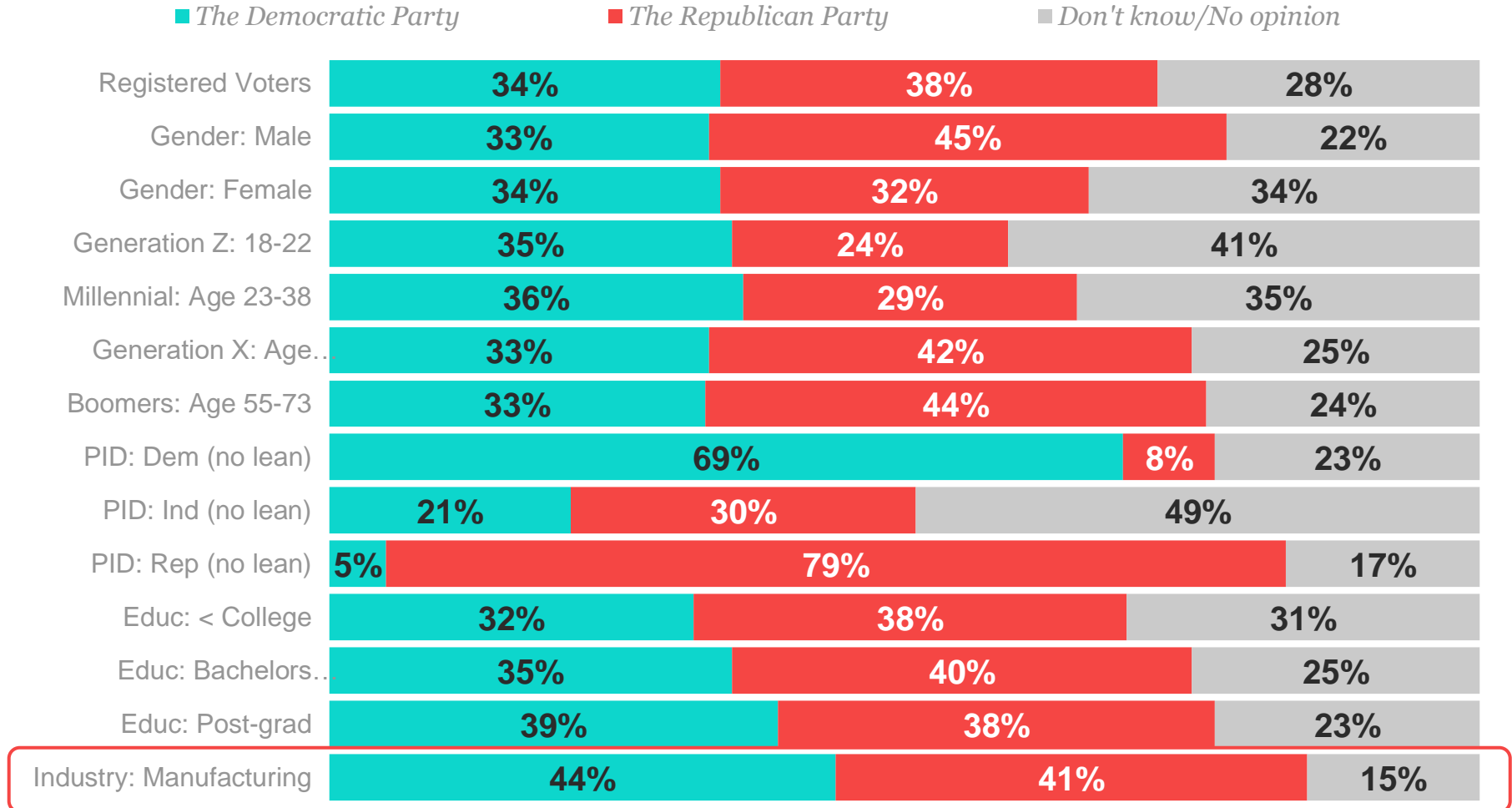
U.S. Registered Voters

The Politics + Policies of Manufacturing U.S. Registered Voters

While most groups lean toward the Republican Party as the historic champion of manufacturing, those that work in the industry tend to think of the Democratic Party in this way.

Historically, which political party do you believe has been a better champion for manufacturing?

U.S. Registered Voters



JAN 2020

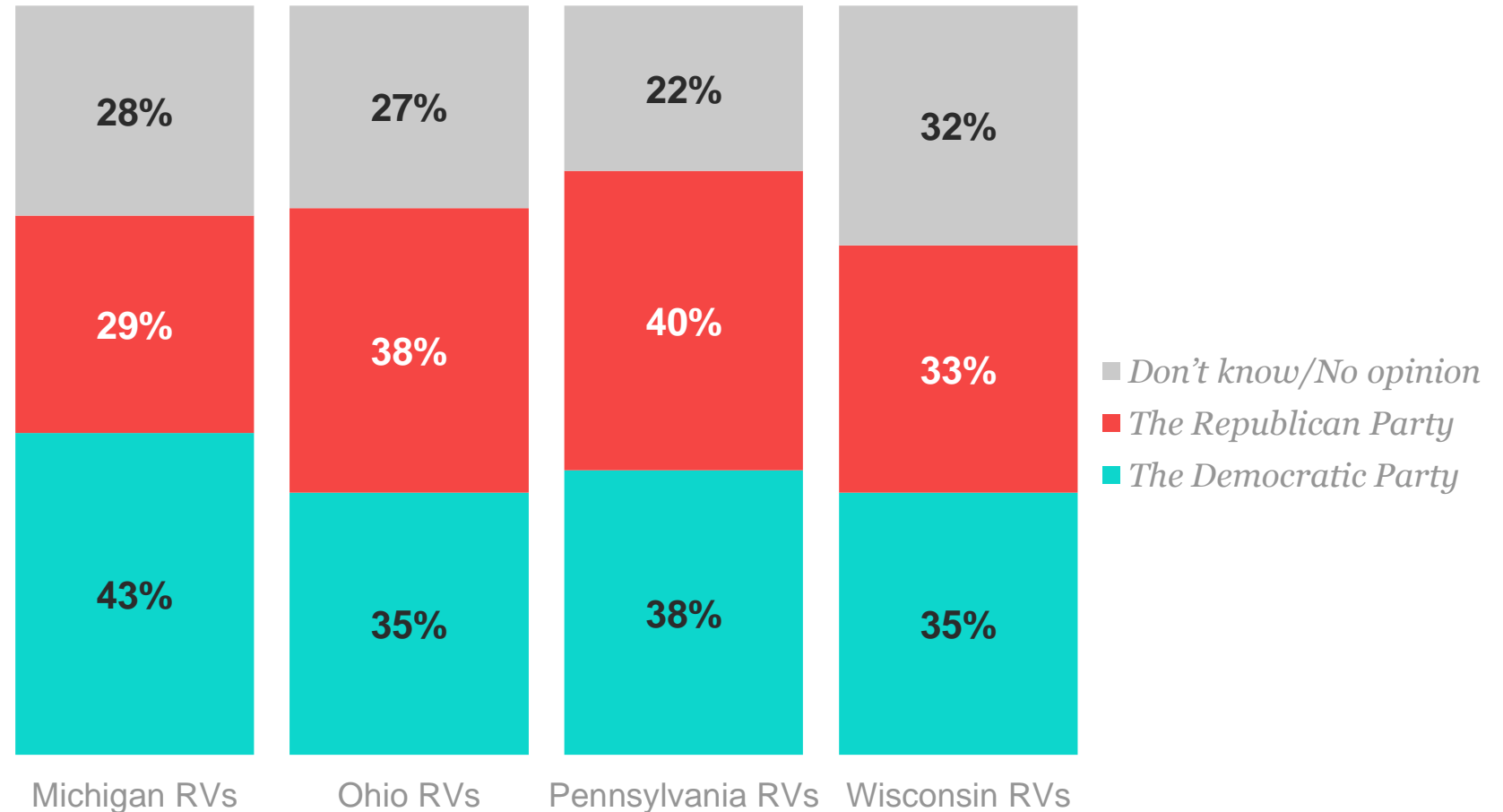
The Politics + Policies of Manufacturing

State-Specific
Registered Voters

In January, Michigan voters were more likely to believe the Democratic Party has been a better champion for manufacturing historically. However voters in Ohio, Pennsylvania and Wisconsin were divided on which party they thought had been the champion historically.

Historically, which political party do you believe has been a better champion for manufacturing?

State-Specific Registered Voters

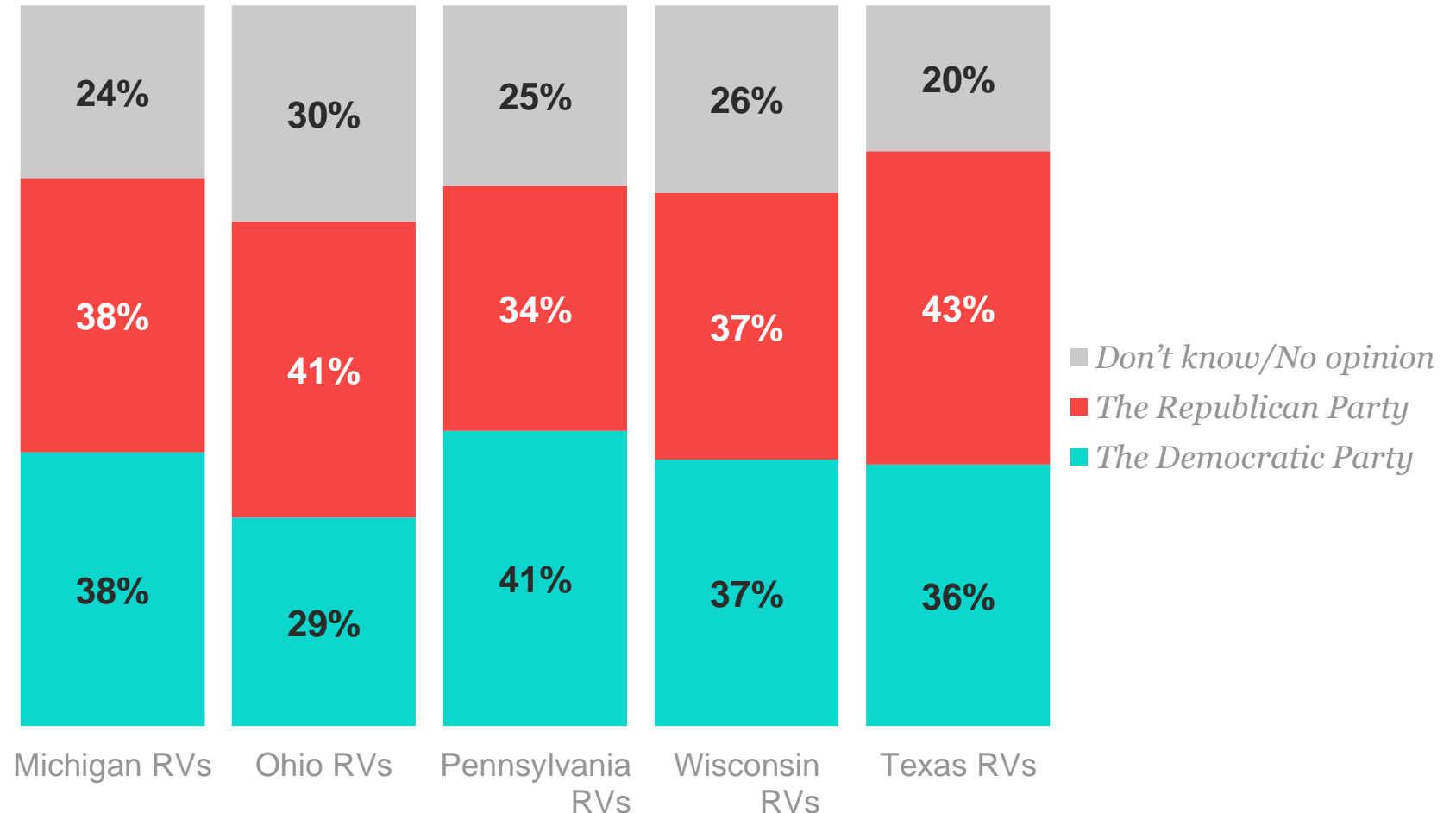


JULY 2020

In July, Ohio and Texas voters are more likely to think the Republican Party has been a champion for manufacturing, while voters are generally still divided in Michigan, Pennsylvania, and Wisconsin.

Historically, which political party do you believe has been a better champion for manufacturing?

State-Specific Registered Voters



The Politics + Policies of Manufacturing

State-Specific Registered Voters

Two-in-five registered voters see the Republican Party as the champion of the manufacturing industry *right now*. Public sentiment on this has remained stable since January.

Currently, which political party do you believe is a champion for manufacturing?

U.S. Registered Voters

Jan 2020

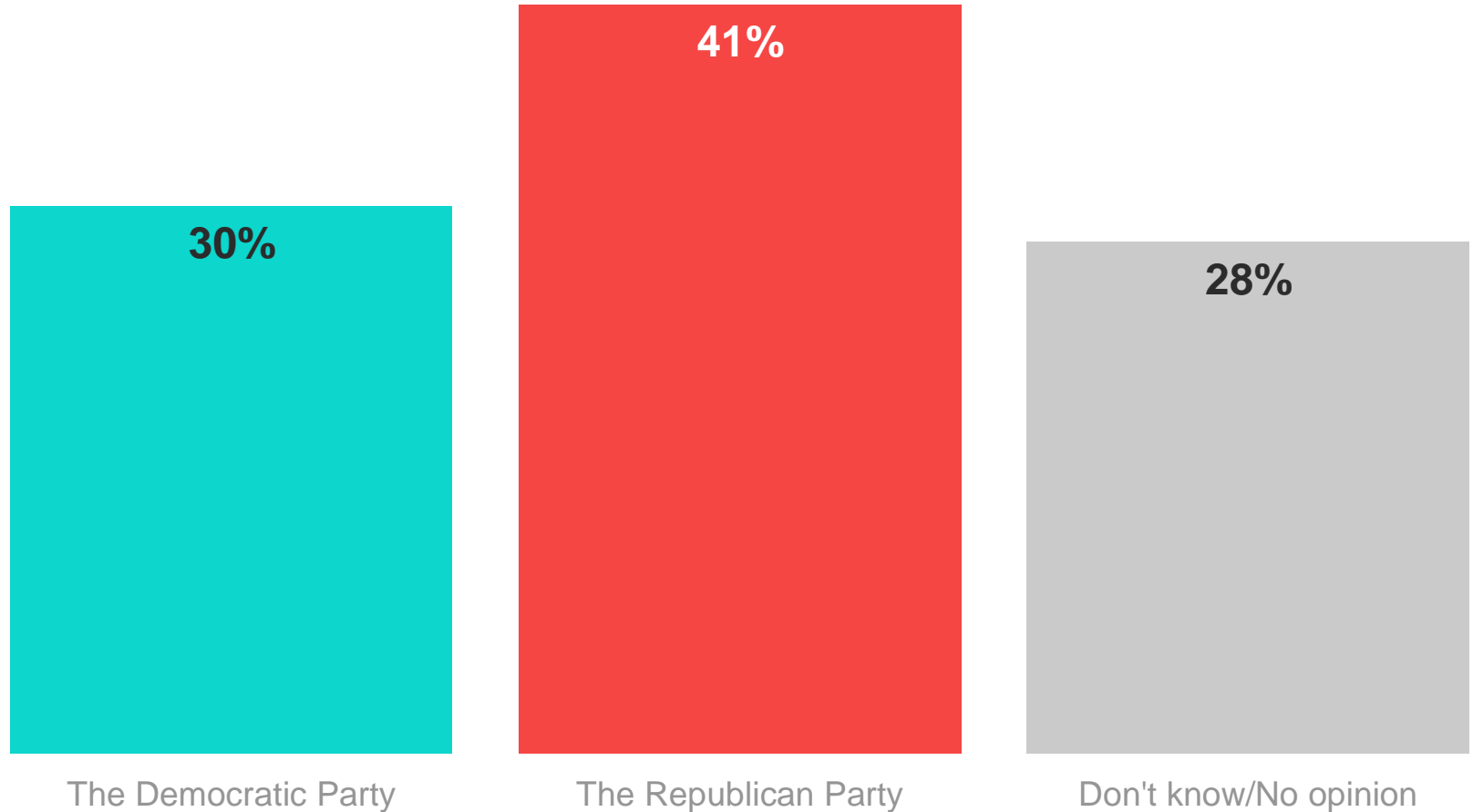
31%

40%

28%

The Politics + Policies of Manufacturing

U.S. Registered Voters

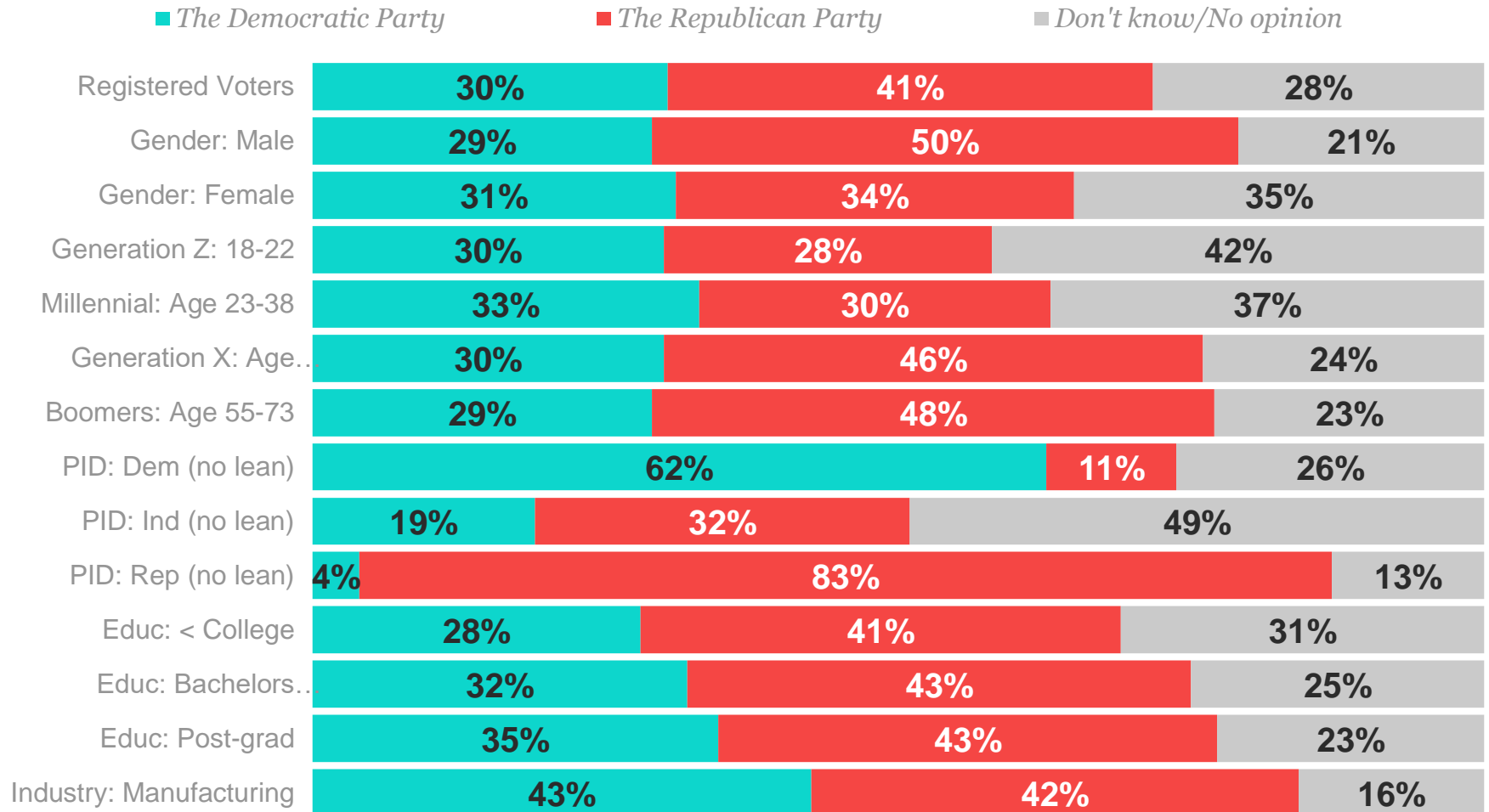


The Politics + Policies of Manufacturing U.S. Registered Voters

Manufacturing workers are divided on which party is *currently* a better champion for their causes. Males and older generations stand out for their leaning toward the Republican Party on this question.

Currently, which political party do you believe is a champion for manufacturing?

U.S. Registered Voters



JAN 2020

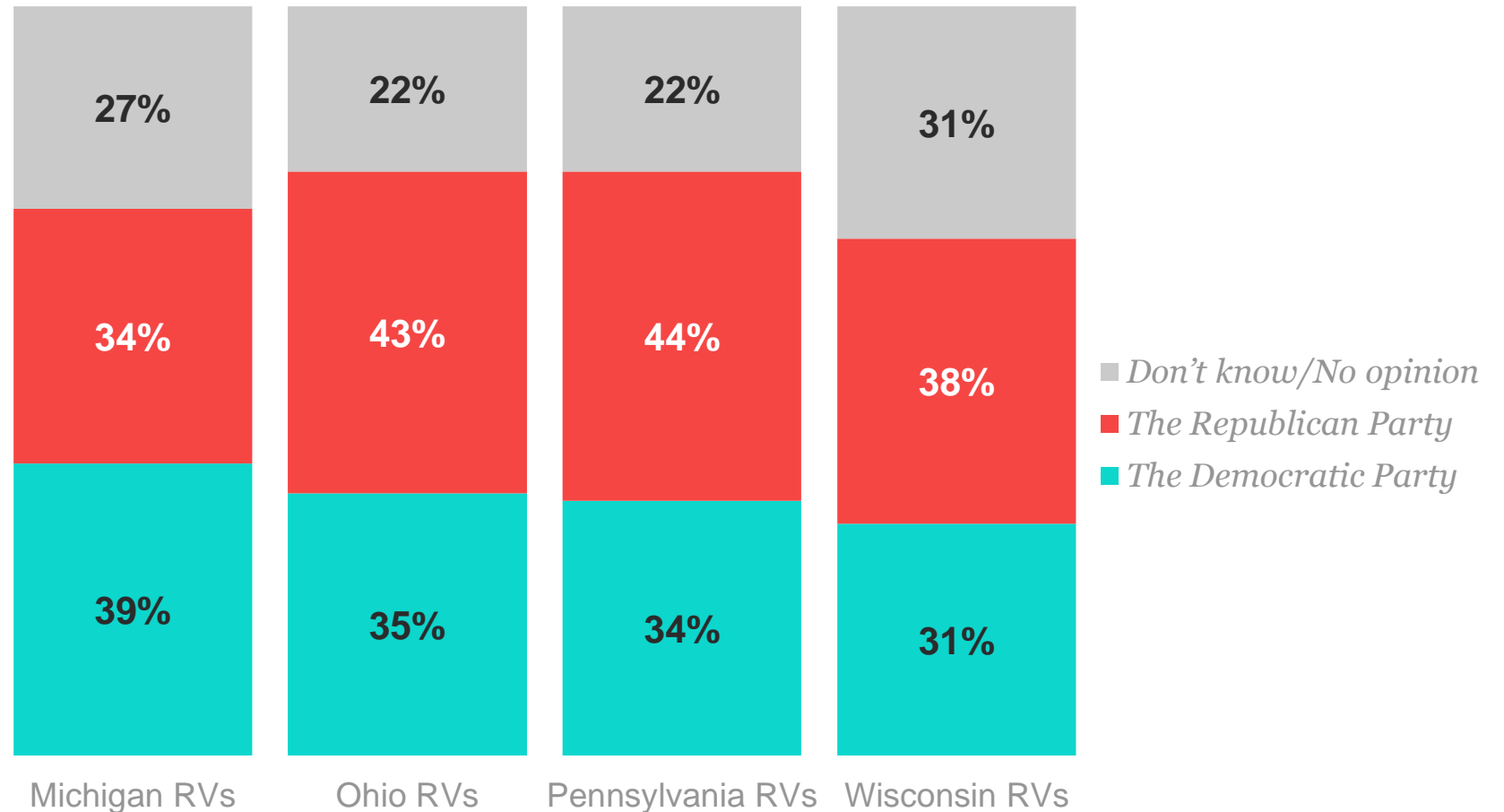
The Politics + Policies of Manufacturing

State-Specific
Registered Voters

In January, Michigan voters were more likely to believe the Democratic Party is currently a better champion for manufacturing. Voters in Ohio, Pennsylvania and Wisconsin were divided on which party they think was the current champion.

Currently, which political party do you believe is a champion for manufacturing?

State-Specific Registered Voters



JULY 2020

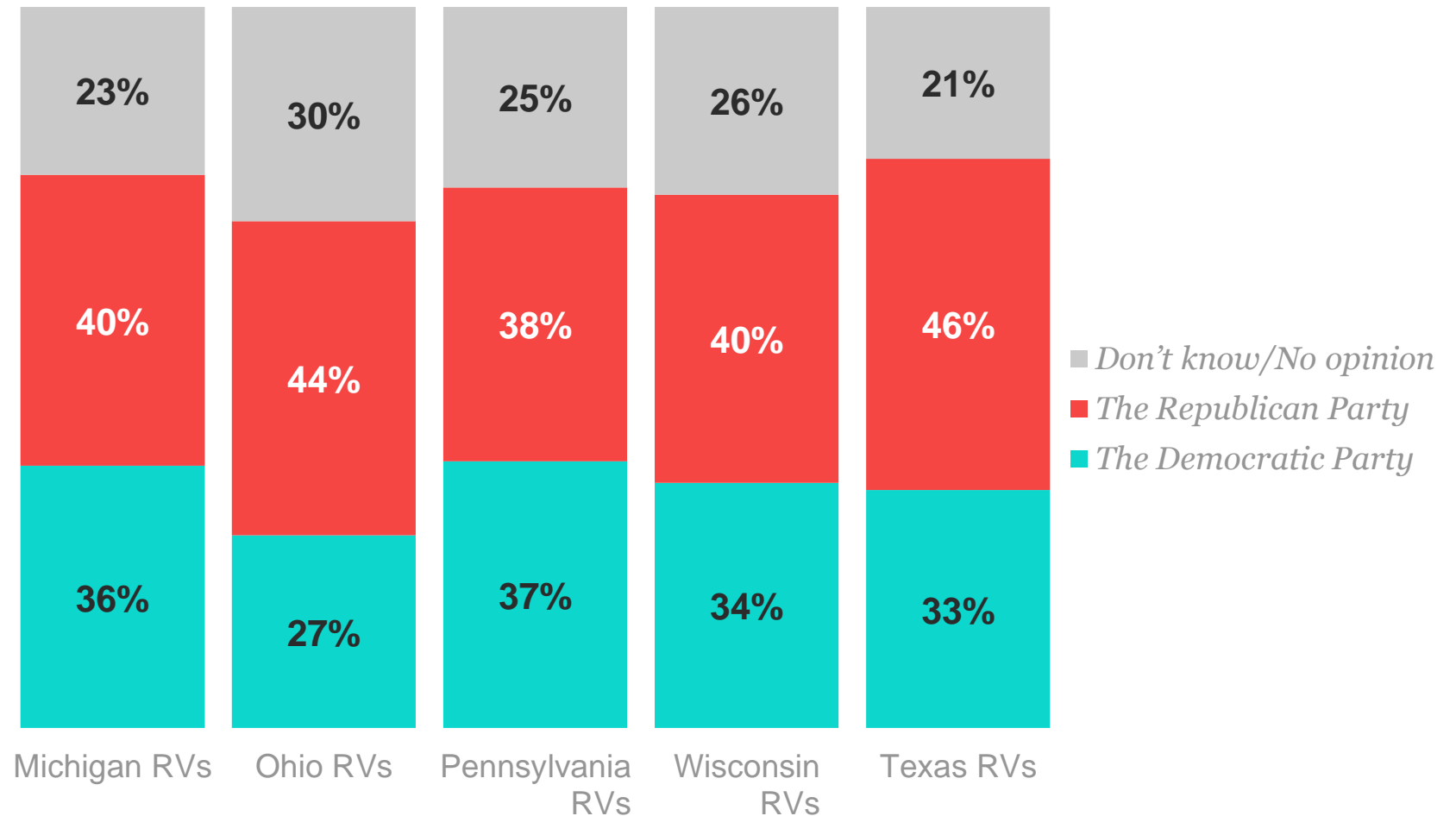
The Politics + Policies of Manufacturing

State-Specific
Registered Voters

Similar to January, voters in Ohio and Wisconsin are more likely to believe the Republican Party is *currently* a champion for manufacturing, while voters in Michigan and Pennsylvania are generally split.

Currently, which political party do you believe is a champion for manufacturing?

State-Specific Registered Voters

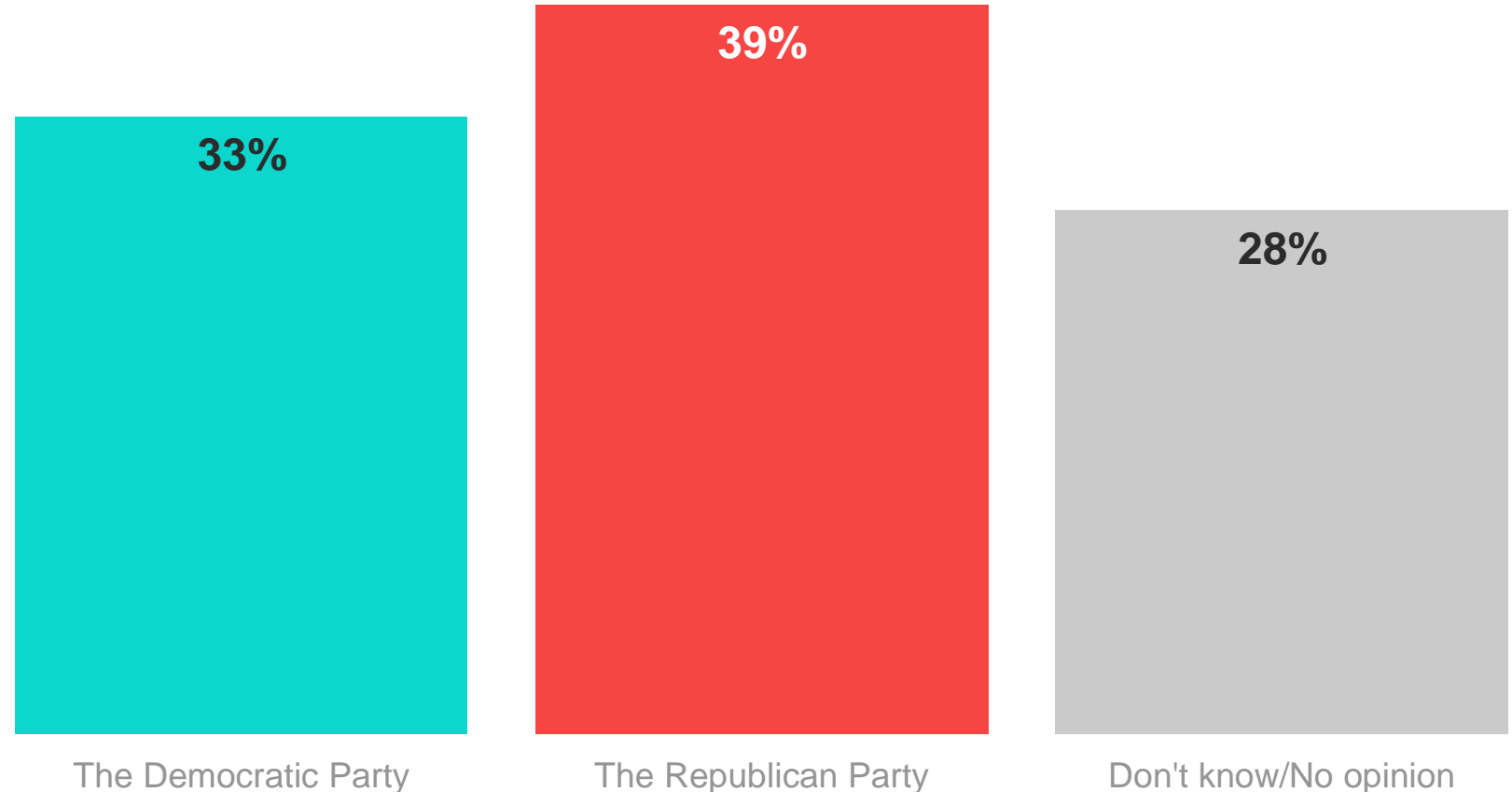


The Republican Party is still generally believed to be the *future* champion of manufacturing in the United States, with a 2% increase in that belief since January among registered voters.

In the future, which political party do you believe will be a better champion for manufacturing?

U.S. Registered Voters

Jan 2020 34% 37% 29%



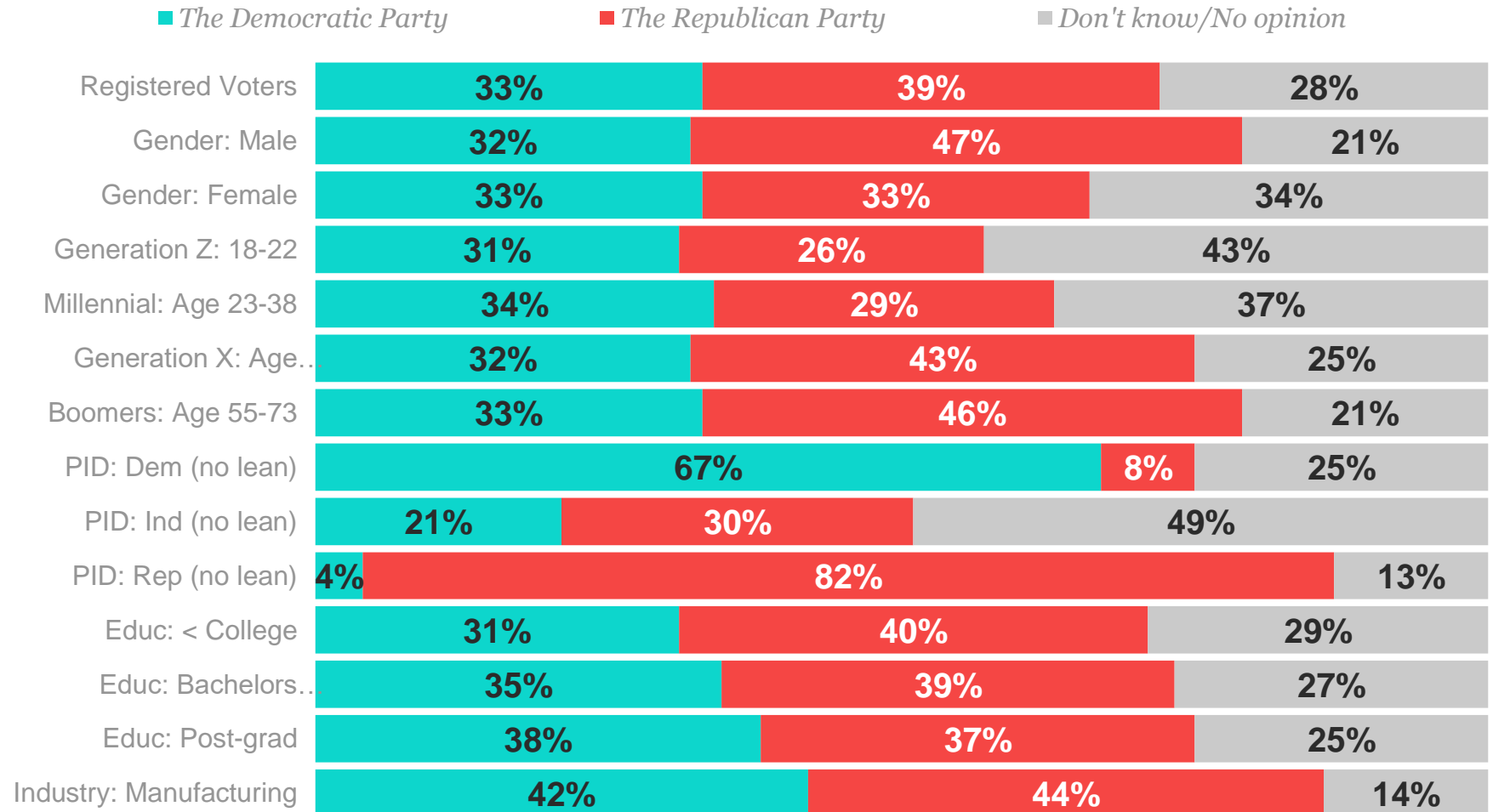
The Politics + Policies of Manufacturing

U.S. Registered Voters

More than 40% among Gen-Z and political Independents indicated they had no opinion on which party would champion manufacturing better moving forward. Males and older generations tend to favor the Republican Party for this.

In the future, which political party do you believe will be a better champion for manufacturing?

U.S. Registered Voters



**The Politics +
Policies of
Manufacturing**
U.S. Registered Voters

JAN 2020

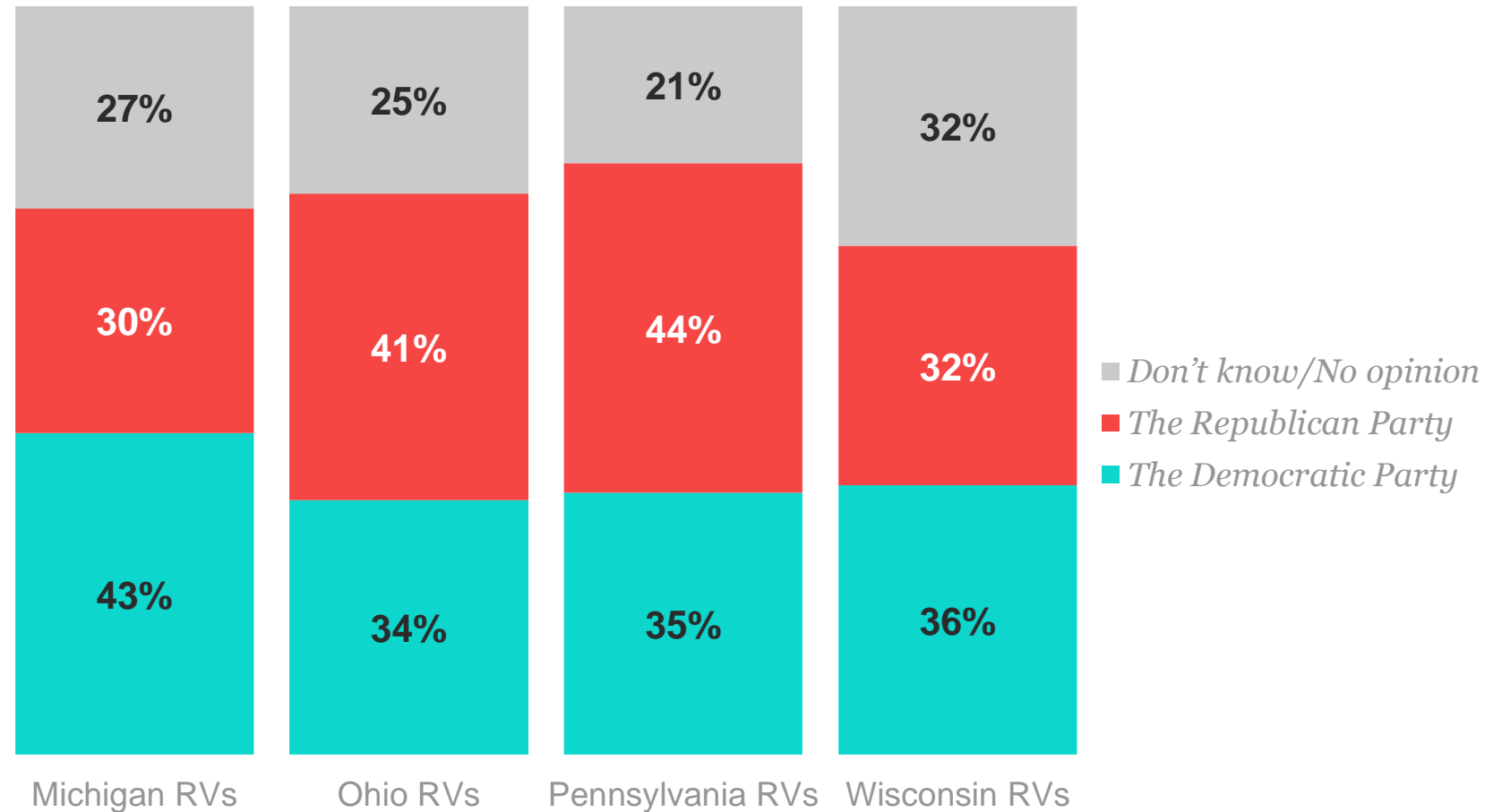
The Politics + Policies of Manufacturing

State-Specific
Registered Voters

In January, Michigan voters were more likely to believe that Democrats will be a better champion for manufacturing in the future, while voters in Ohio and Pennsylvania were more confident in Republicans championing manufacturing in the future. Wisconsin voters were split.

In the future, which political party do you believe will be a better champion for manufacturing?

State-Specific Registered Voters



JULY 2020

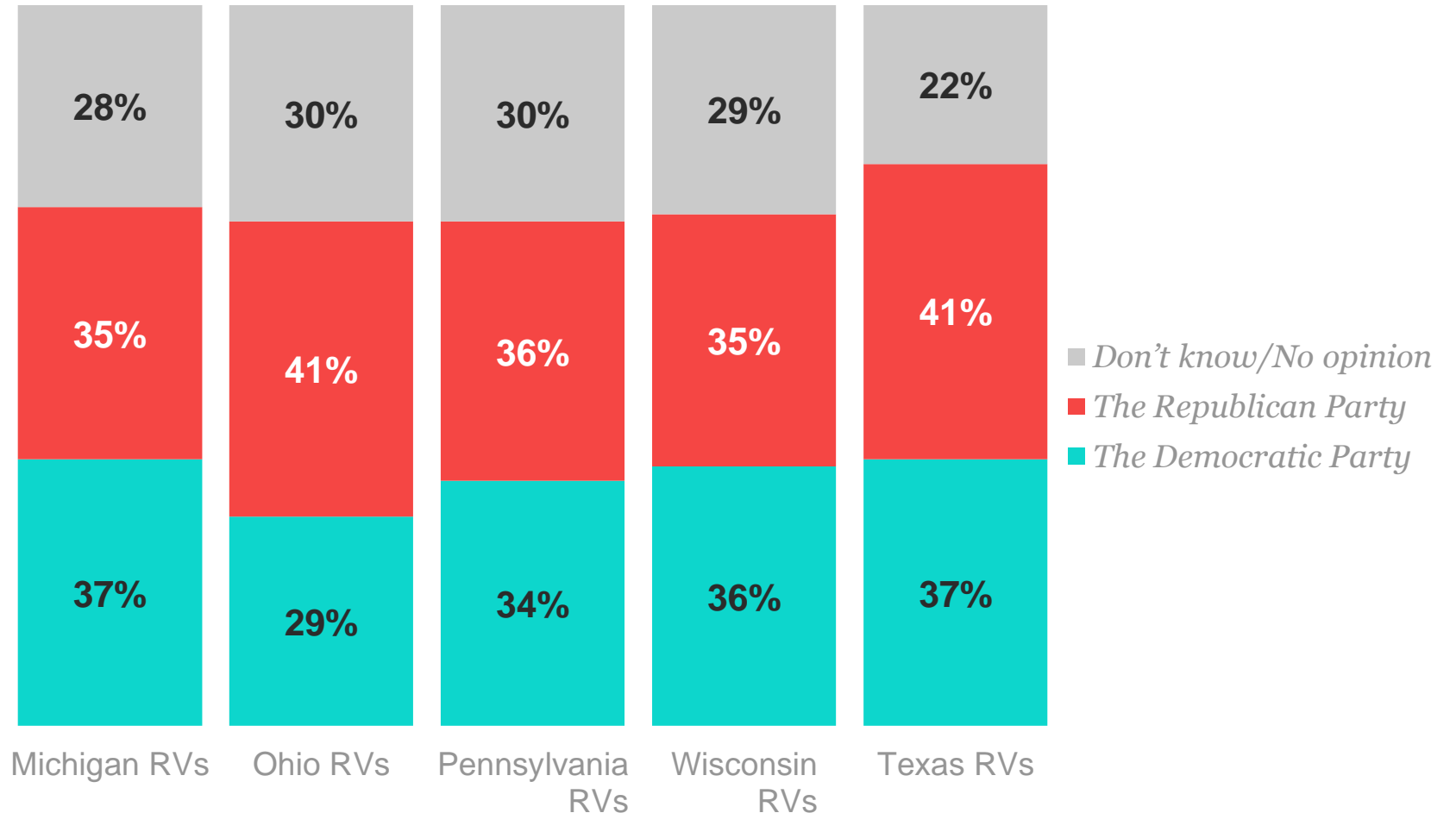
The Politics + Policies of Manufacturing

State-Specific
Registered Voters

Voters in Ohio and Texas are more likely to believe the Republican Party will be a better champion for manufacturing in the *future*. Michigan, Pennsylvania, and Wisconsin voters are split.

In the future, which political party do you believe will be a better champion for manufacturing?

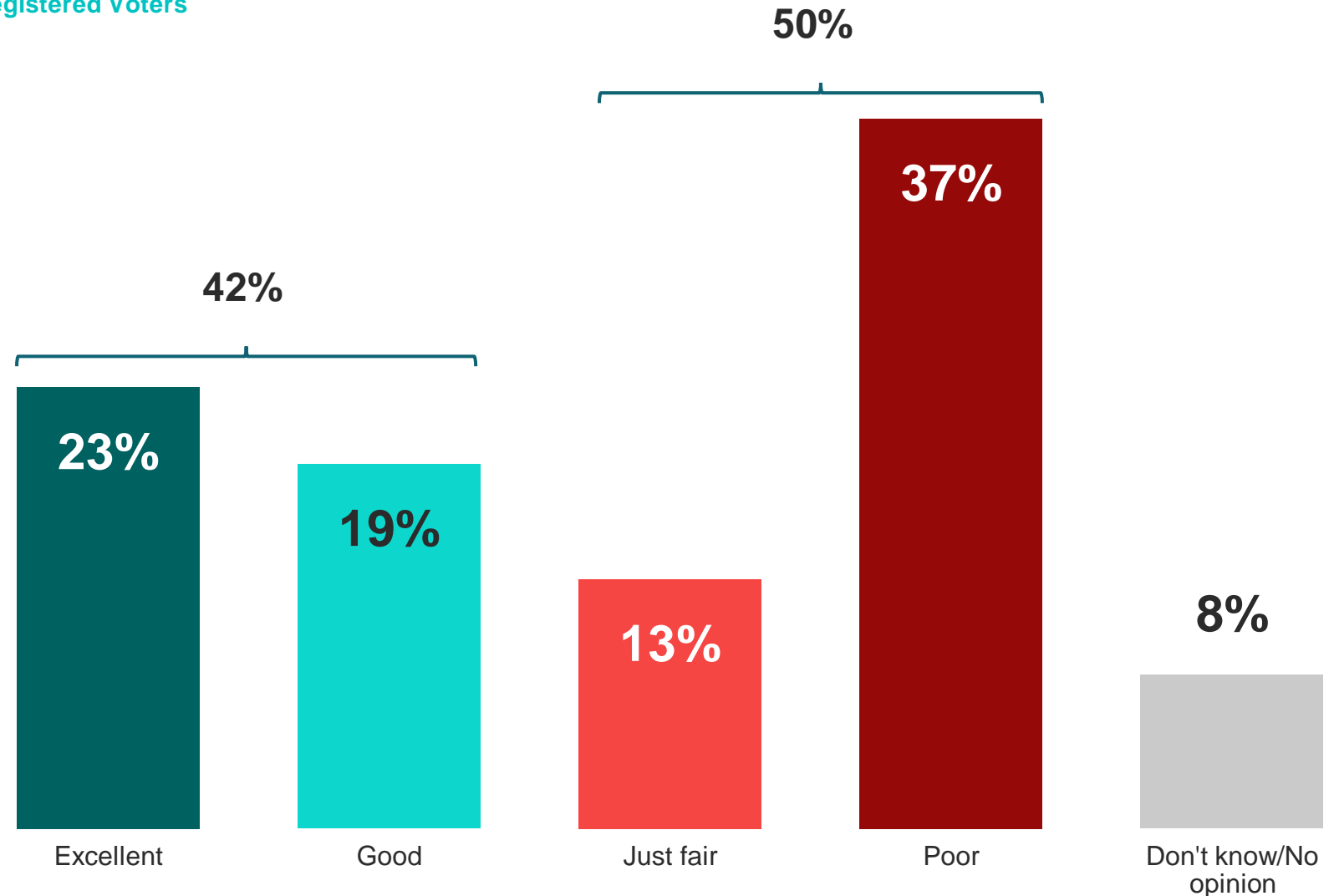
State-Specific Registered Voters



The plurality (37%) of registered voters in the United States characterize President Trump's job supporting the manufacturing industry as *poor*. While overall positive and negative sentiment only differ by 8% in total, the intensity of those rating him negatively is considerably higher.

How would you rate the job President Trump has done on supporting the manufacturing industry since taking office?

U.S. Registered Voters



The Politics + Policies of Manufacturing

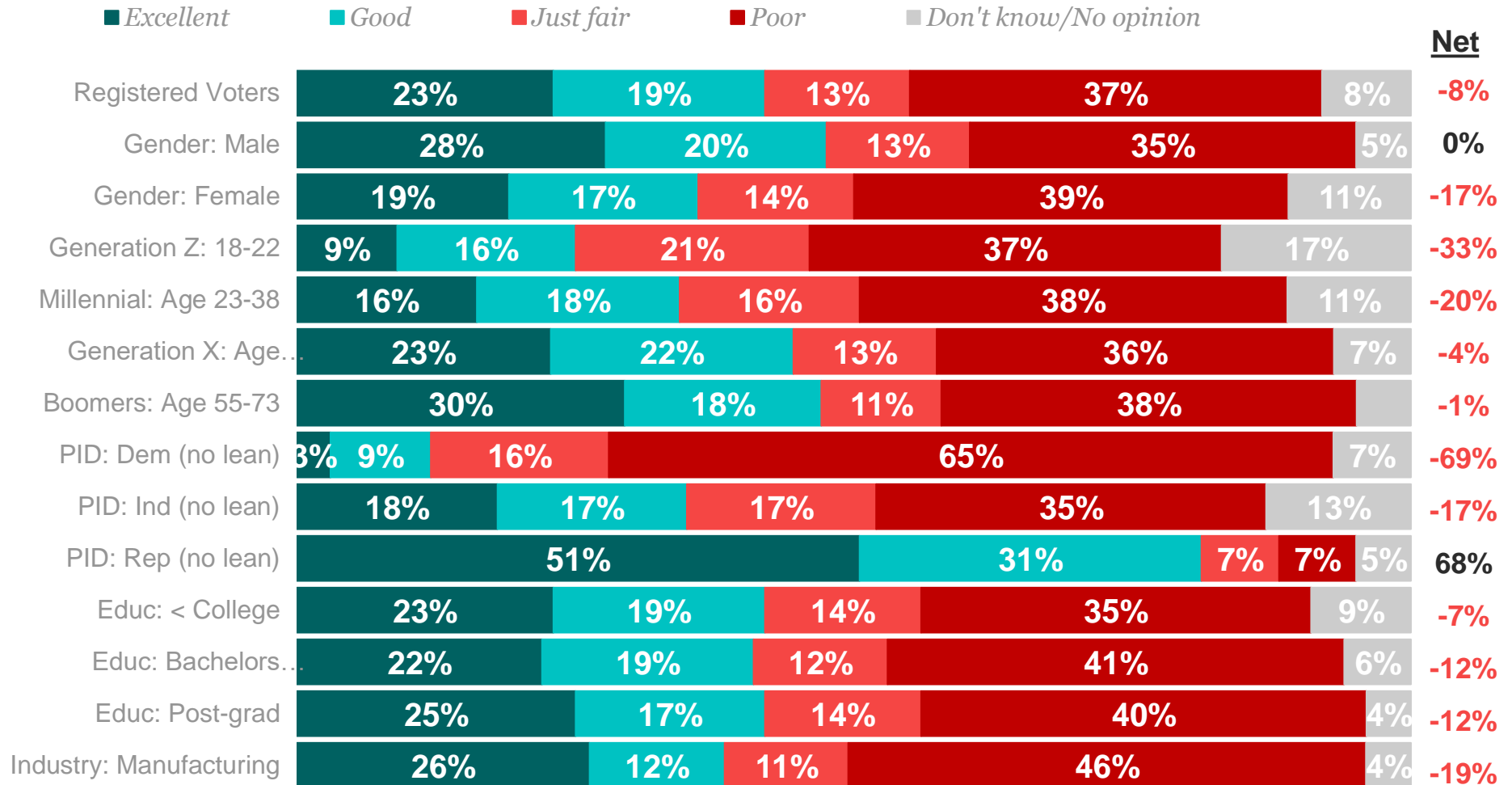
U.S. Registered Voters

The Politics + Policies of Manufacturing U.S. Registered Voters

Positive appraisals of President Trump's job supporting the manufacturing industry are higher among older generations. Nearly half of those that work in the industry rate his performance as *poor*.

How would you rate the job President Trump has done on supporting the manufacturing industry since taking office?

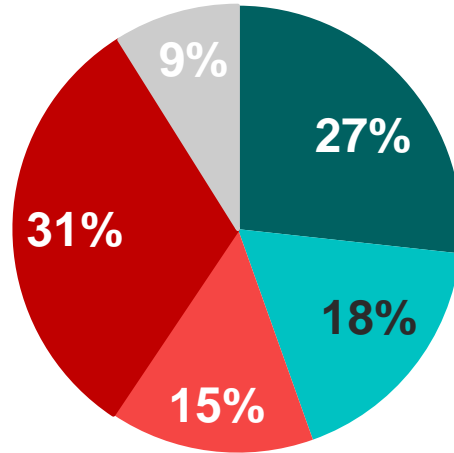
U.S. Registered Voters



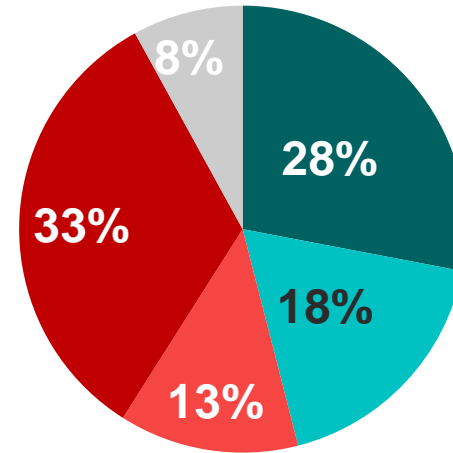
The majority of registered voters in Pennsylvania, Texas, and Wisconsin rate President Trump's job supporting the manufacturing industry as *just fair* or *poor*. While negative ratings on the issue are still high among Michigan and Ohio voters, about one-in-four rate his performance as *excellent*.

How would you rate the job President Trump has done on supporting the manufacturing industry since taking office?

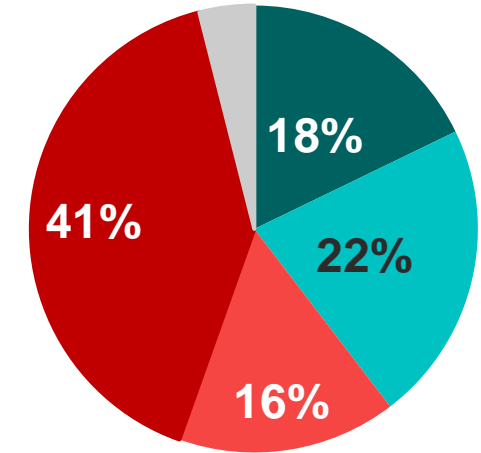
Michigan Registered Voters



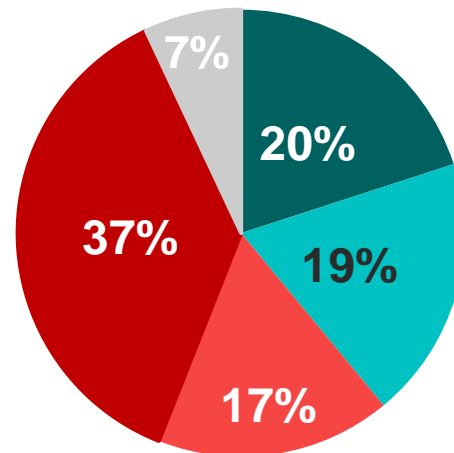
Ohio Registered Voters



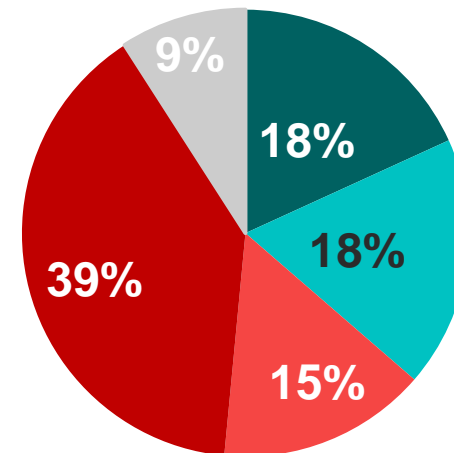
Pennsylvania Registered Voters



Texas Registered Voters



Wisconsin Registered Voters



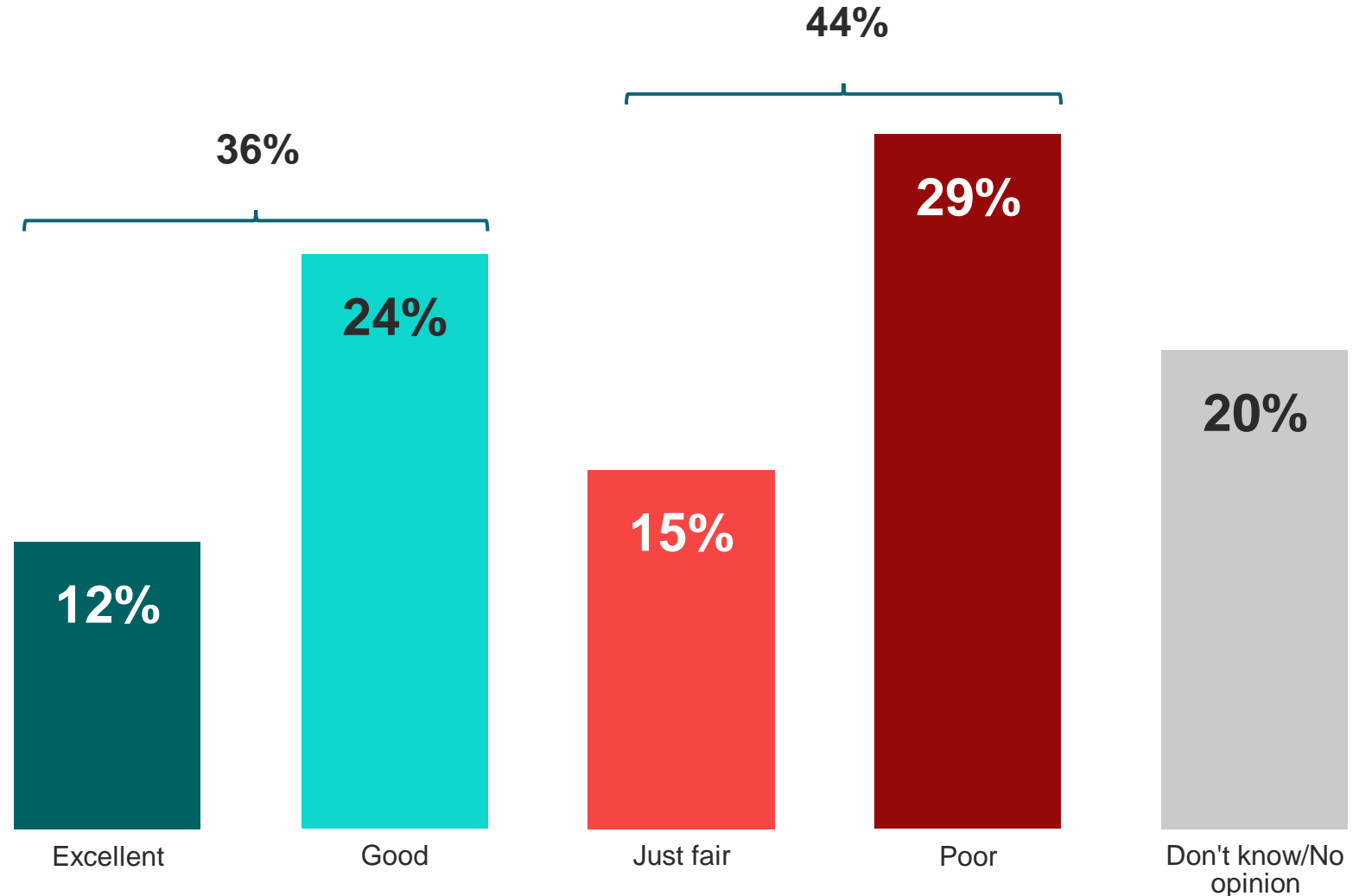
The State of Manufacturing

State-Specific Registered Voters

One-in-five registered voters is unsure of how well Joe Biden would support the manufacturing industry if elected. Similar to the public's opinion on how Donald Trump has helped domestic manufacturers, the intensity of negative opinions on the issue is notably higher than that of positive opinions.

How good of a job would Joe Biden do to support the manufacturing industry, if elected President?

U.S. Registered Voters



The Politics + Policies of Manufacturing

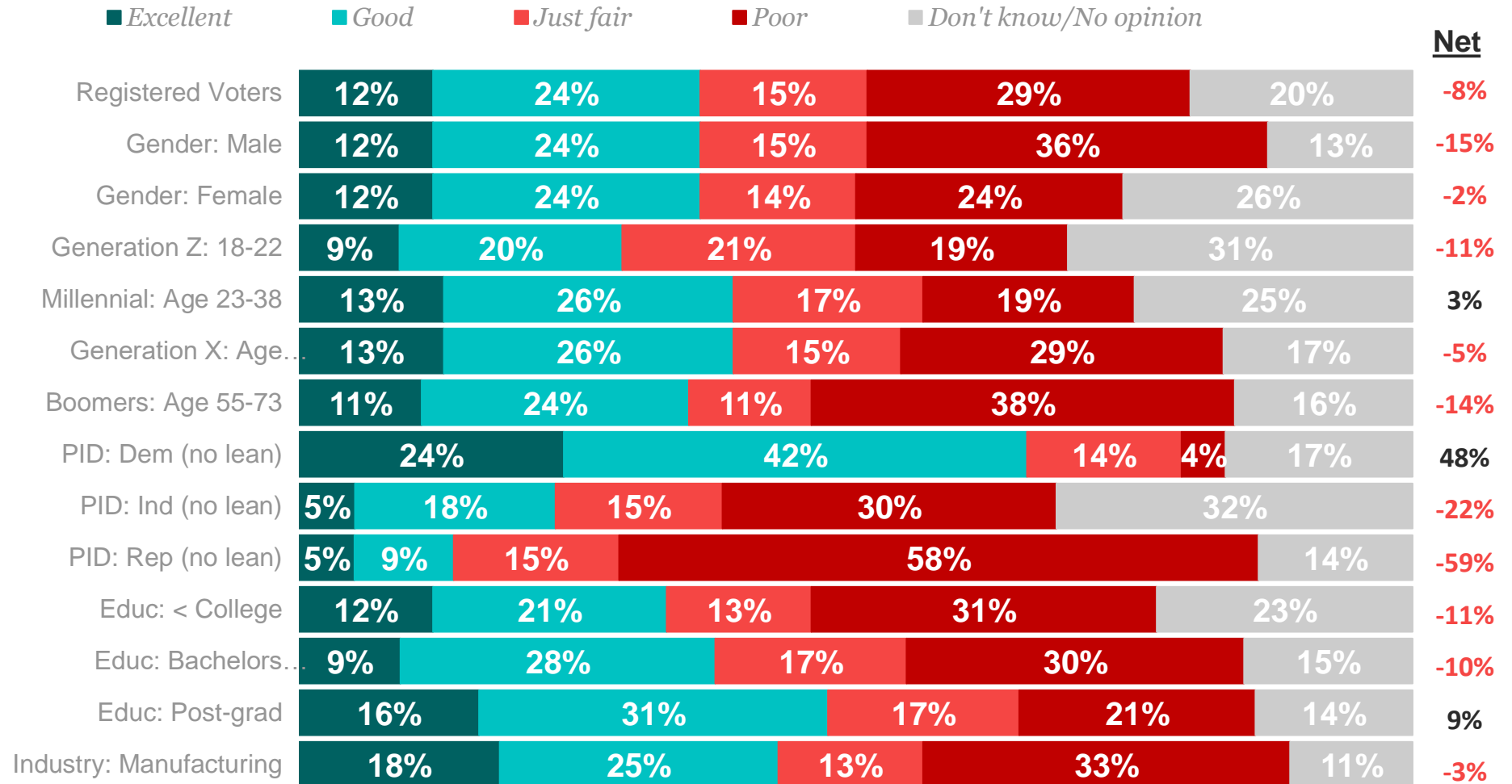
U.S. Registered Voters

The Politics + Policies of Manufacturing U.S. Registered Voters

While still generally negative, expectations for how Joe Biden would support manufacturers are generally less critical than ratings of how President Trump has performed in that respect. Millennials and those with post-graduate education stand out as particularly optimistic.

How good of a job would Joe Biden do to support the manufacturing industry, if elected President?

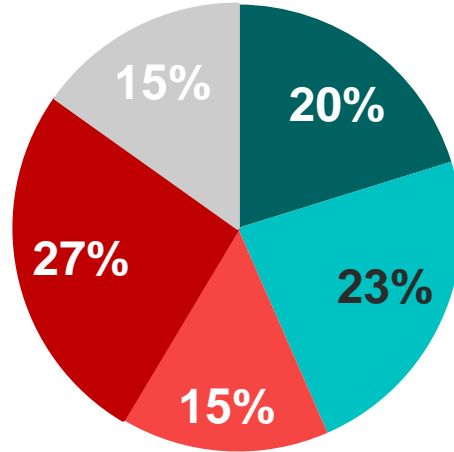
U.S. Registered Voters



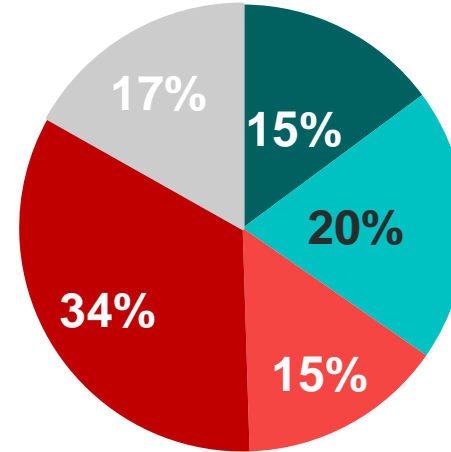
Registered voters in Ohio, Texas, and Wisconsin are considerably more likely to expect Joe Biden to do a *just fair/poor* job supporting manufacturers than an *excellent/good* job. Michigan voters are split on the issue, while Pennsylvanians are slightly optimistic. Sizeable shares of voters in these states do not have an opinion on this.

How good of a job would Joe Biden do to support the manufacturing industry, if elected President?

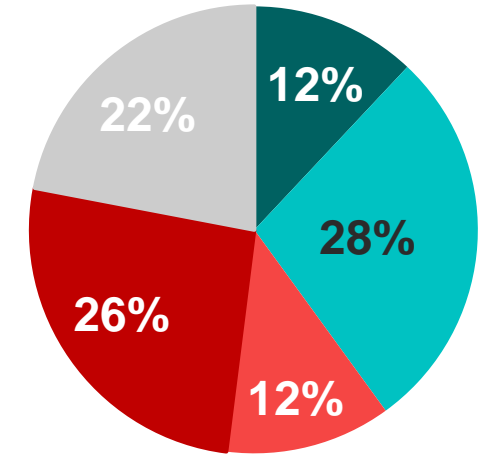
Michigan Registered Voters



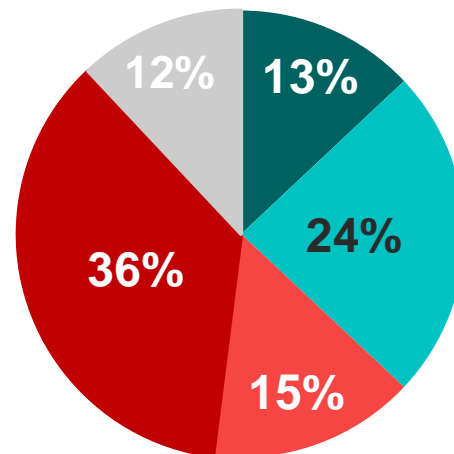
Ohio Registered Voters



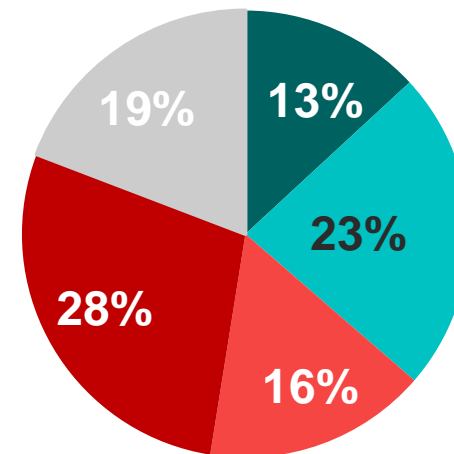
Pennsylvania Registered Voters



Texas Registered Voters



Wisconsin Registered Voters



■ Excellent

■ Good

■ Just fair

■ Poor

■ Don't know/No opinion

The State of Manufacturing

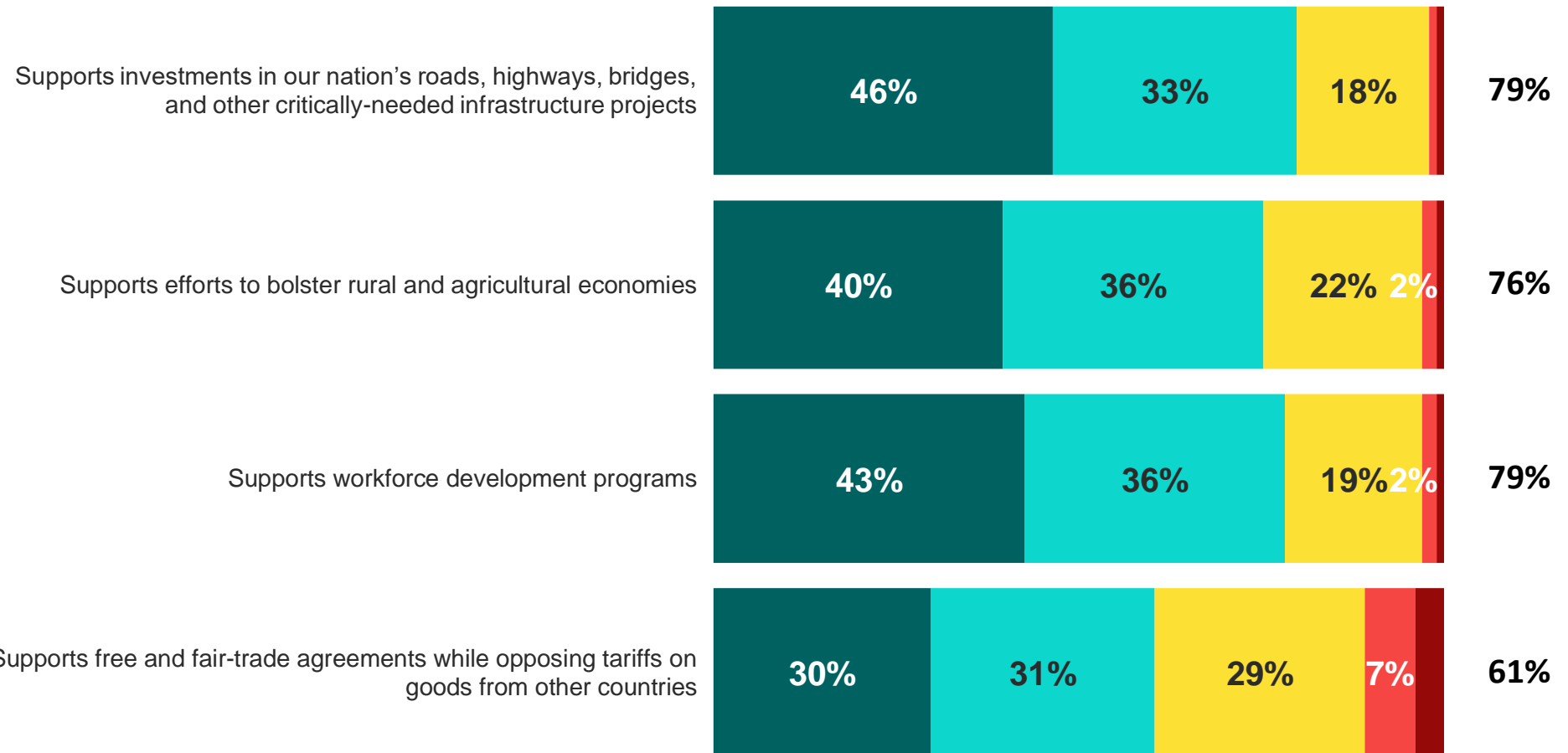
State-Specific Registered Voters

Favoring investment in infrastructure, workforce development programs, and rural economies are stances that would increase support among more than 70% of registered voters.

Below are a variety of stances a candidate running for office might take on manufacturing. Would each of the following policy stances make you more or less likely to support this candidate in the next election?

U.S. Registered Voters

■ *Much more likely to support*
■ *Somewhat more likely to support*
■ *Neither more nor less likely to support*
■ *Somewhat less likely to support*
■ *Much less likely to support*
Total Support



Ranked by "Much More Likely to Support"

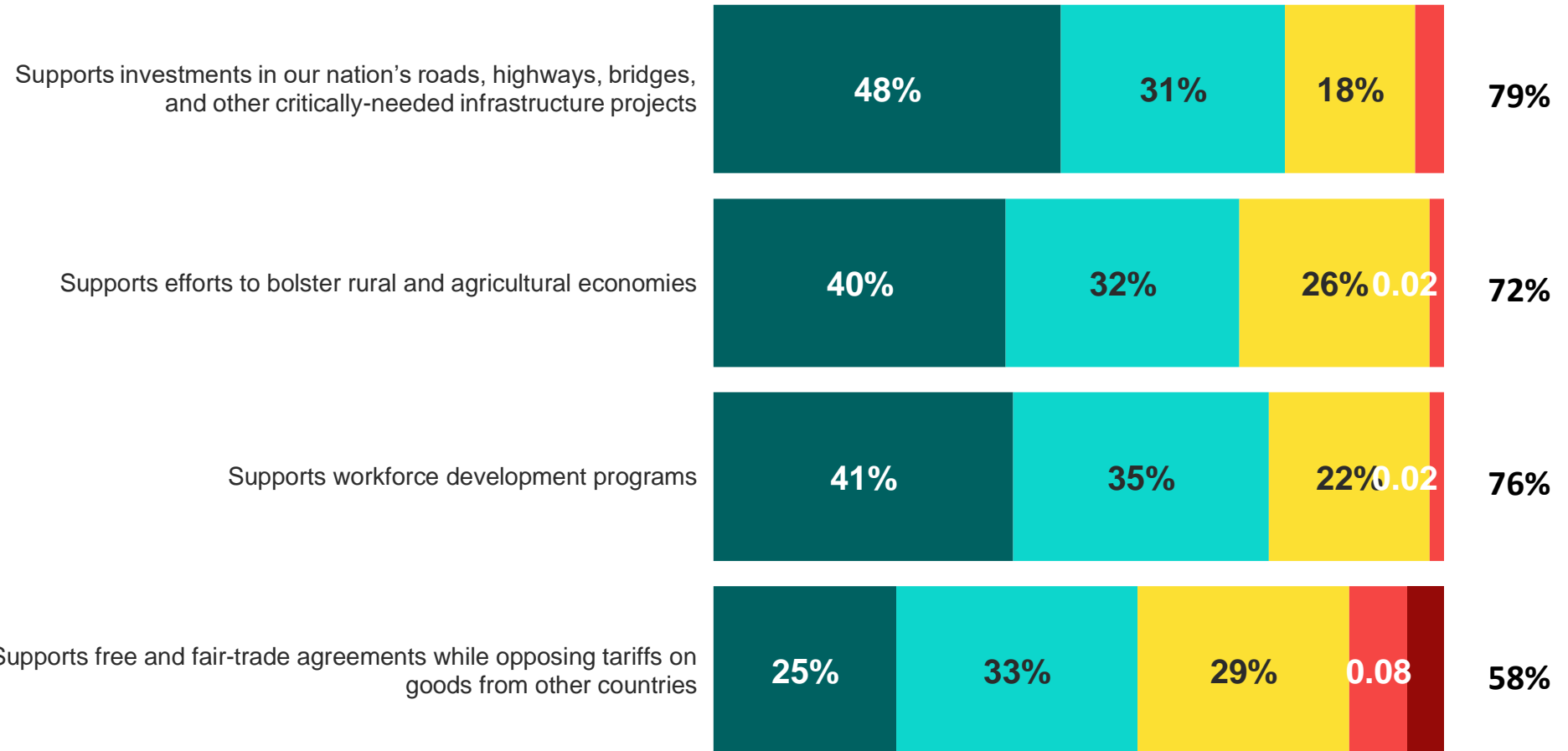
The Politics + Policies of Manufacturing U.S. Registered Voters

Registered voters in Michigan resemble the nation at large in terms of their support for candidates backing policies tested. Investment in the nation’s infrastructure garnered the most unanimously positive response, with 79% indicating they would be more likely to support a candidate in favor of doing so.

Below are a variety of stances a candidate running for office might take on manufacturing. Would each of the following policy stances make you more or less likely to support this candidate in the next election?

Michigan Registered Voters

■ Much more likely to support
■ Somewhat more likely to support
■ Neither more nor less likely to support
■ Somewhat less likely to support
■ Much less likely to support
Total Support



Ranked by “Much More Likely to Support”

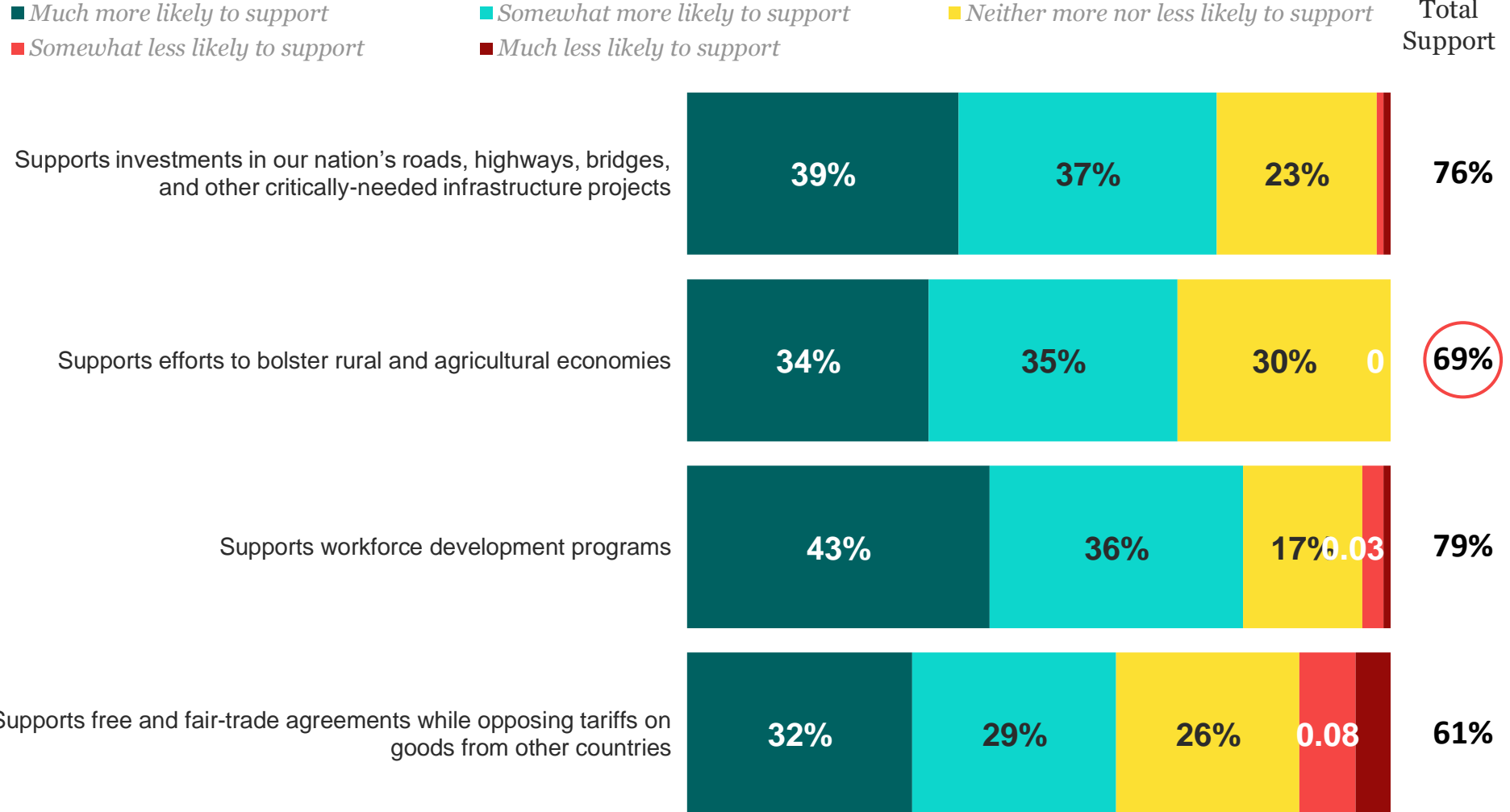
The Politics + Policies of Manufacturing U.S. Registered Voters

The Politics + Policies of Manufacturing U.S. Registered Voters

While Ohioans resemble the national sample on their support for most candidate stances tested, they stand apart for being 7% less likely to support someone backing efforts to support rural economies than the nation at large.

Below are a variety of stances a candidate running for office might take on manufacturing. Would each of the following policy stances make you more or less likely to support this candidate in the next election?

Ohio Registered Voters



Ranked by "Much More Likely to Support"

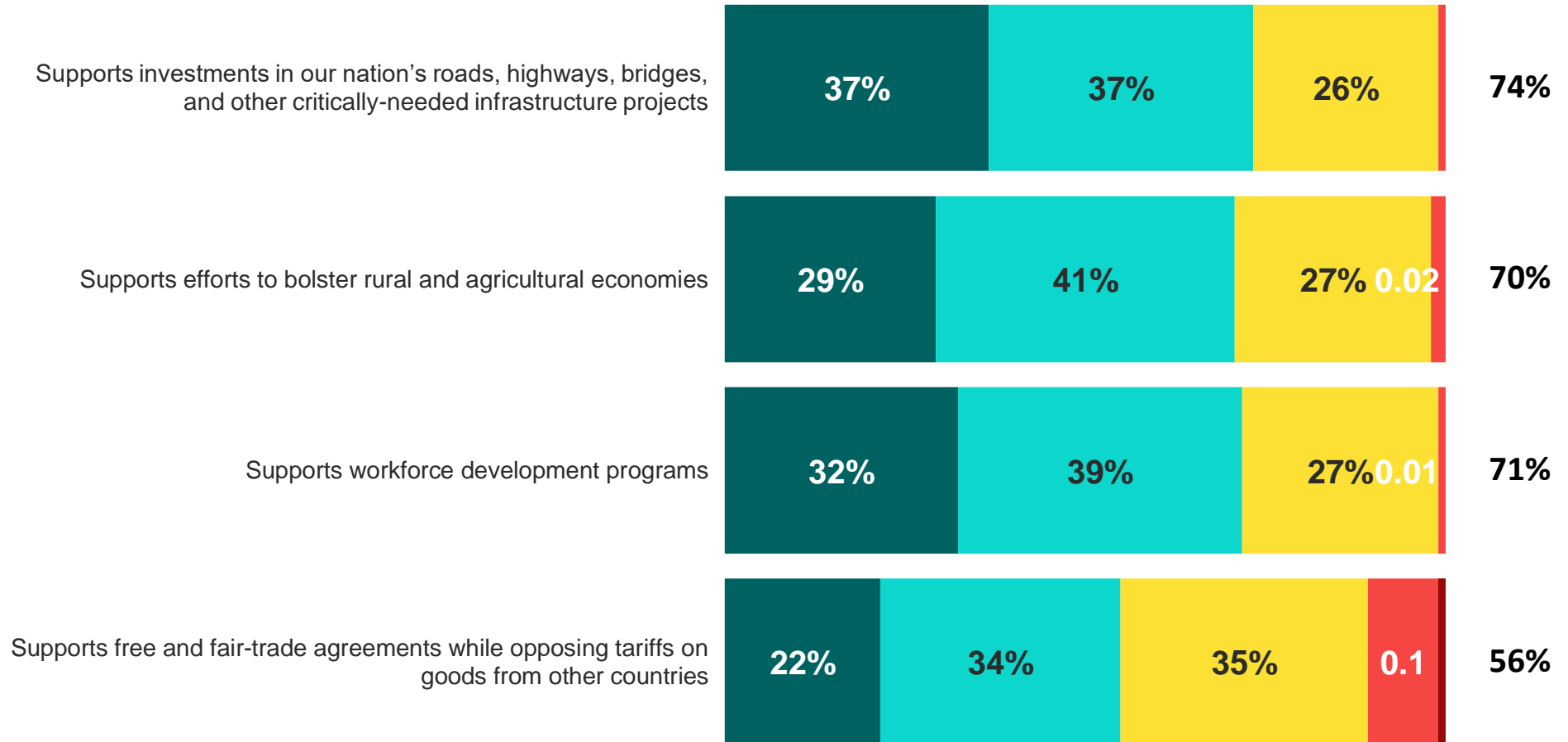
The Politics + Policies of Manufacturing U.S. Registered Voters

Voters in Pennsylvania were less swayed than the rest of the nation by each of the policy stances tested by 5-8%.

Below are a variety of stances a candidate running for office might take on manufacturing. Would each of the following policy stances make you more or less likely to support this candidate in the next election?

Pennsylvania Registered Voters

■ *Much more likely to support*
 ■ *Somewhat more likely to support*
 ■ *Neither more nor less likely to support*
 Total Support
■ *Somewhat less likely to support*
 ■ *Much less likely to support*



Ranked by "Much More Likely to Support"

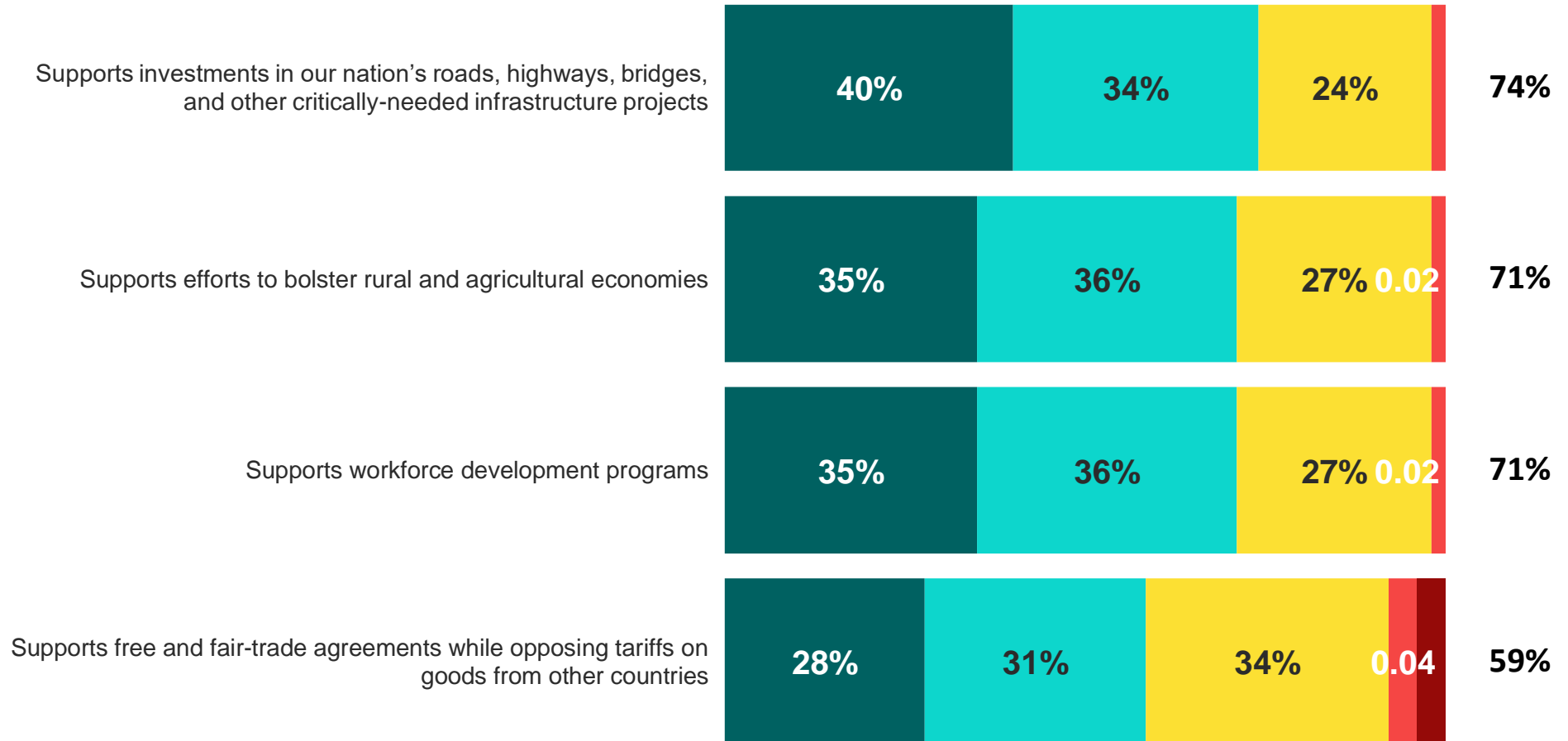
The Politics + Policies of Manufacturing U.S. Registered Voters

Like Pennsylvanians, Wisconsin voters were less likely to increase support for a political candidate based on them taking any of the stances tested than the rest of the United States.

Below are a variety of stances a candidate running for office might take on manufacturing. Would each of the following policy stances make you more or less likely to support this candidate in the next election?

Wisconsin Registered Voters

■ *Much more likely to support*
■ *Somewhat more likely to support*
■ *Neither more nor less likely to support*
■ *Somewhat less likely to support*
■ *Much less likely to support*
Total Support



Ranked by "Much More Likely to Support"

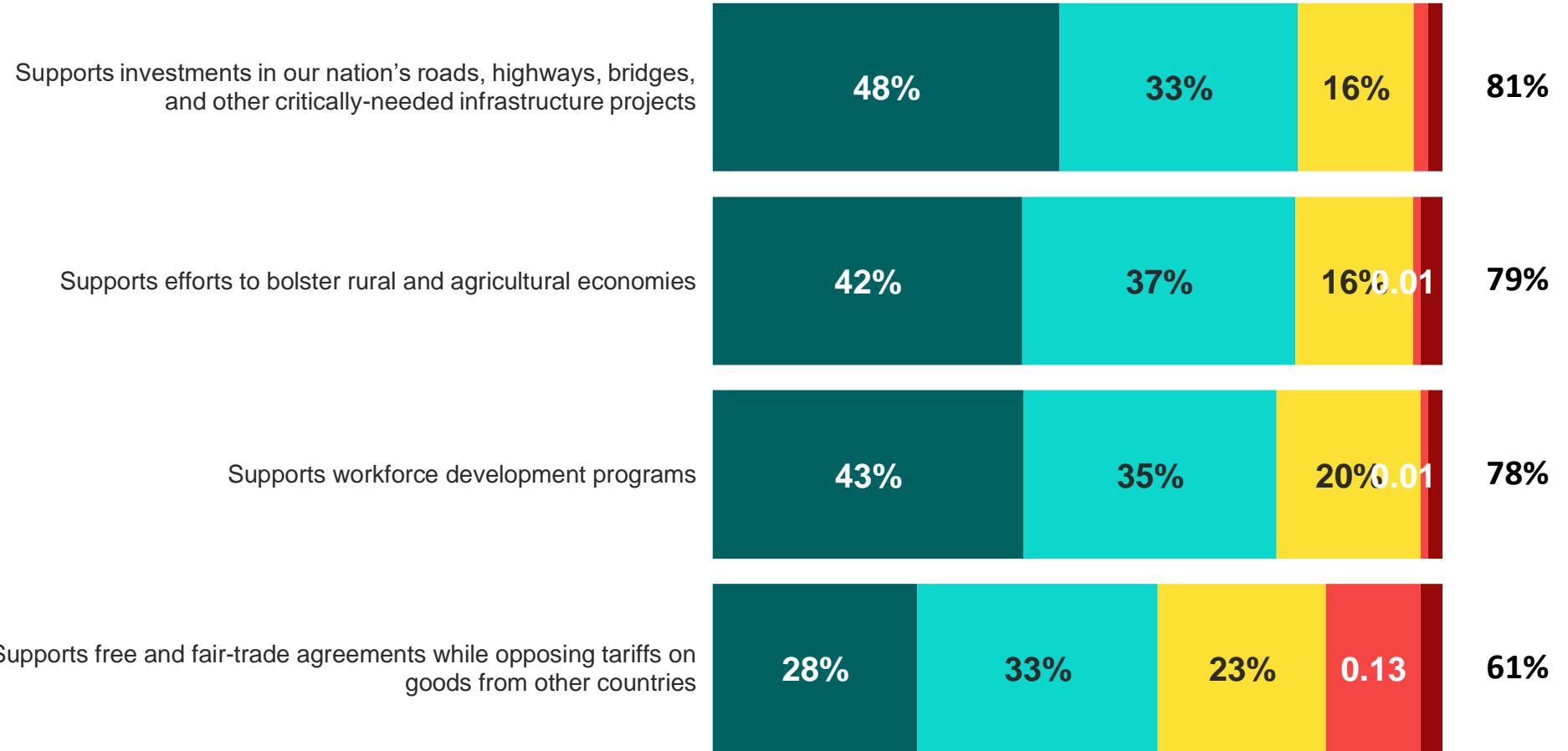
The Politics + Policies of Manufacturing U.S. Registered Voters

Texans are 2-3% more likely than the national sample to increase support for a candidate based on the policies tested.

Below are a variety of stances a candidate running for office might take on manufacturing. Would each of the following policy stances make you more or less likely to support this candidate in the next election?

Texas Registered Voters

■ *Much more likely to support*
■ *Somewhat more likely to support*
■ *Neither more nor less likely to support*
■ *Somewhat less likely to support*
■ *Much less likely to support*
Total Support



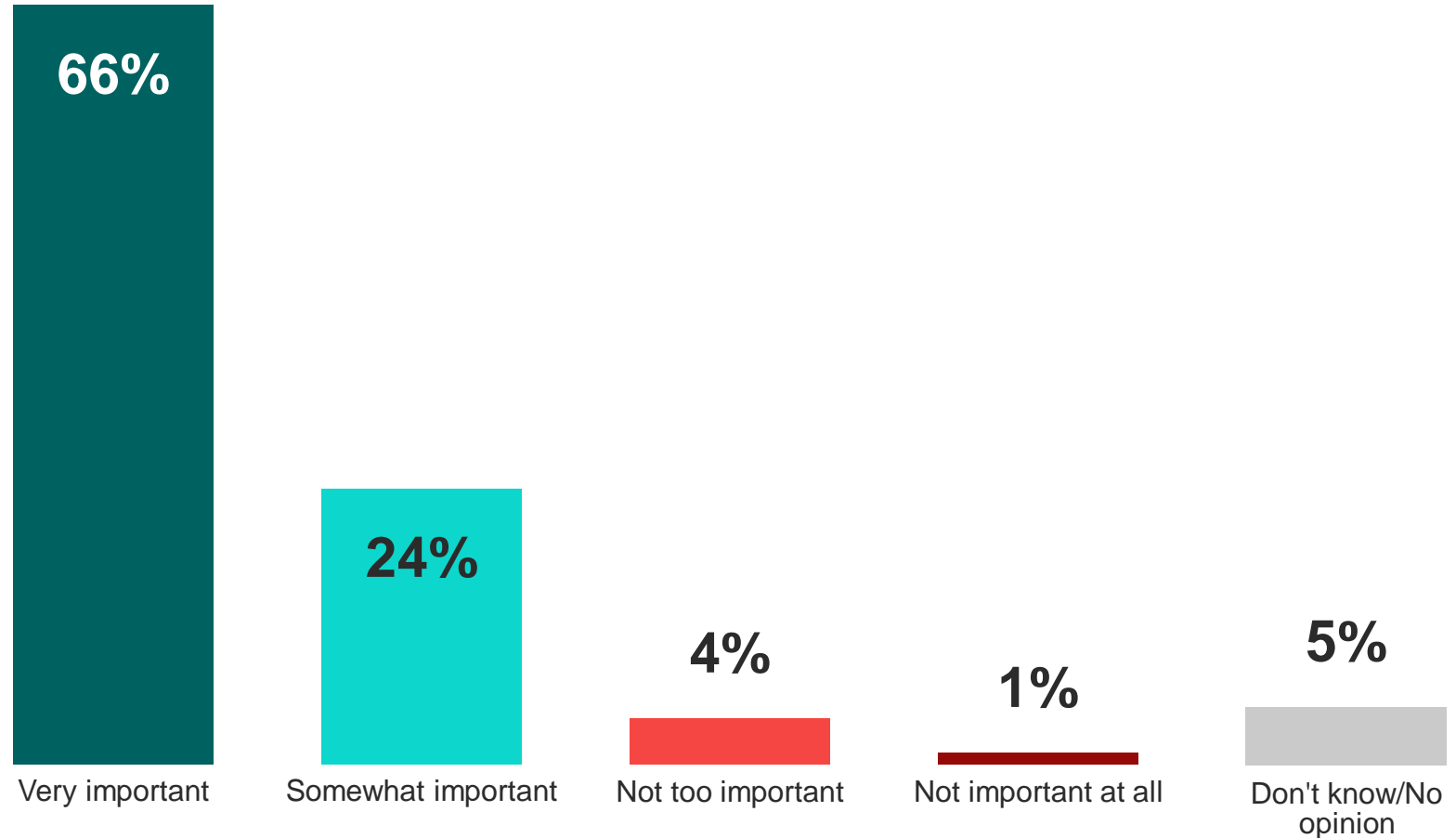
Ranked by "Much More Likely to Support"

The Politics + Policies of Manufacturing

U.S. Registered Voters

Two-thirds of registered voters believe it is *very important* for elected officials to support American manufacturers amid the difficulties brought about by the Covid-19 pandemic.

Given the impact of the coronavirus (Covid-19) pandemic on the U.S. economy and jobs, how important is it, if at all, for elected officials to support manufacturers?



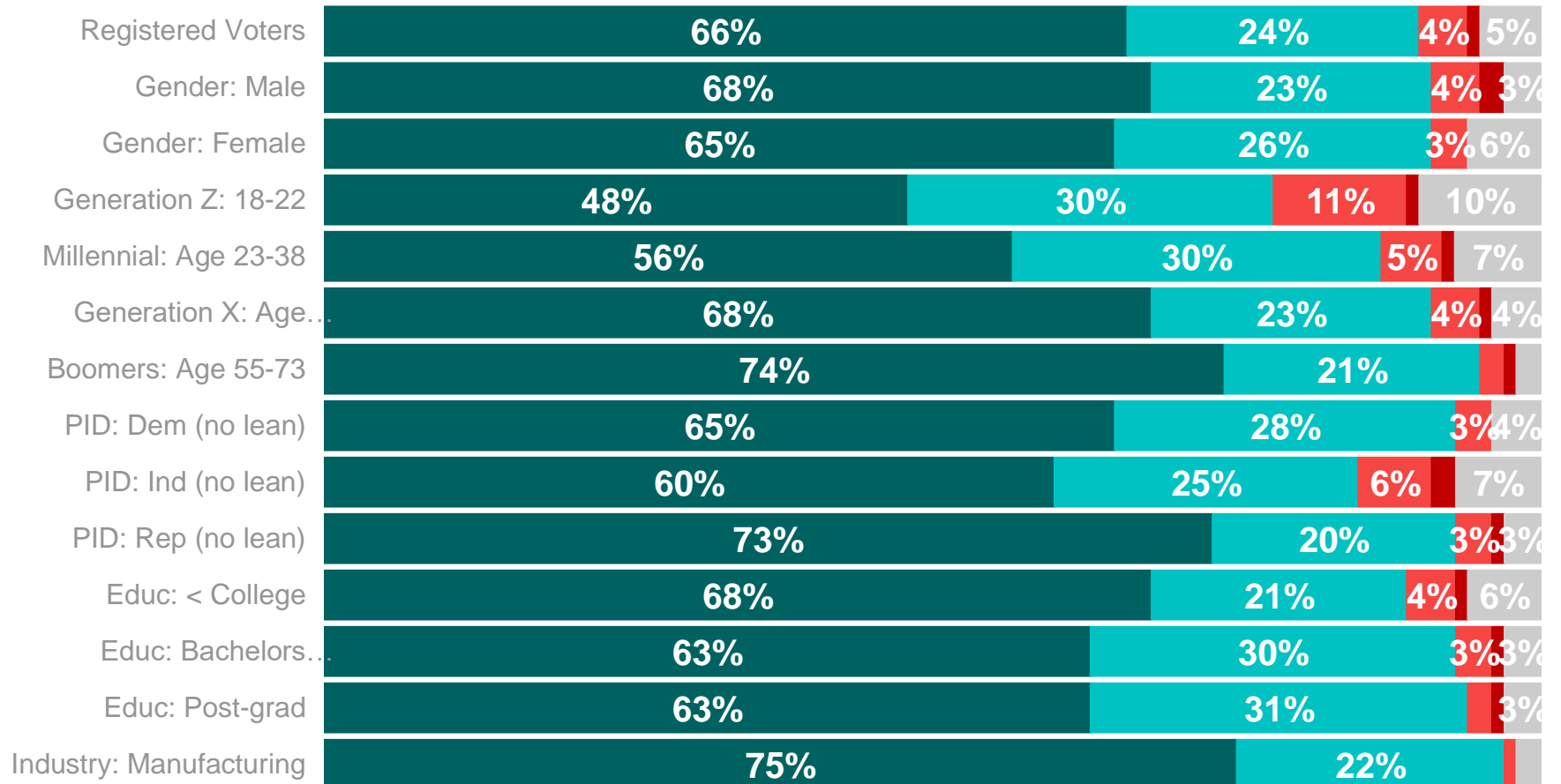
The Politics + Policies of Manufacturing U.S. Registered Voters

Manufacturing workers, Republicans, and Baby Boomers stand out for their strong beliefs that elected officials should support manufacturers during the pandemic, while Gen-Z is less emphatic (but still strong) in that belief.

Given the impact of the coronavirus (Covid-19) pandemic on the U.S. economy and jobs, how important is it, if at all, for elected officials to support manufacturers?

U.S. Registered Voters

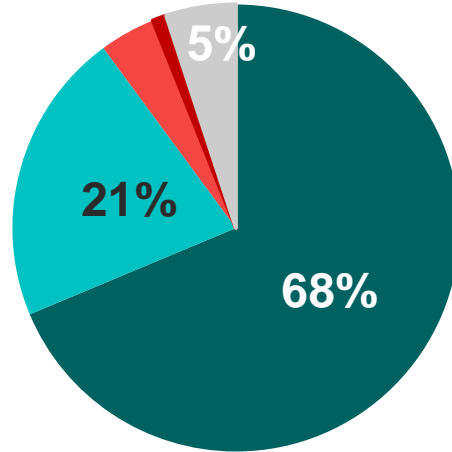
■ Very important ■ Somewhat important ■ Not too important ■ Not important at all ■ Don't know/No opinion



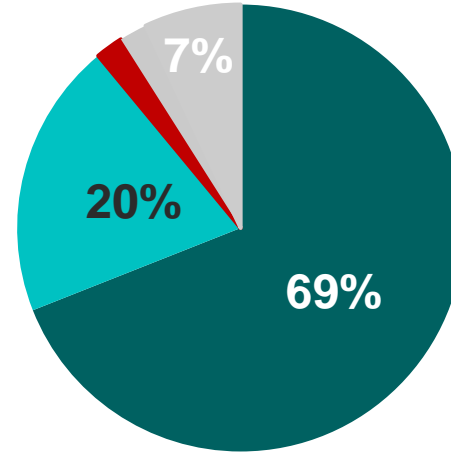
Perceived importance of elected officials helping the manufacturing industry overcome difficulties associated with the COVID-19 pandemic is highest among Pennsylvania RVs (95% important), while Texans feel least strongly on the issue (88%).

Given the impact of the coronavirus (Covid-19) pandemic on the U.S. economy and jobs, how important is it, if at all, for elected officials to support manufacturers?

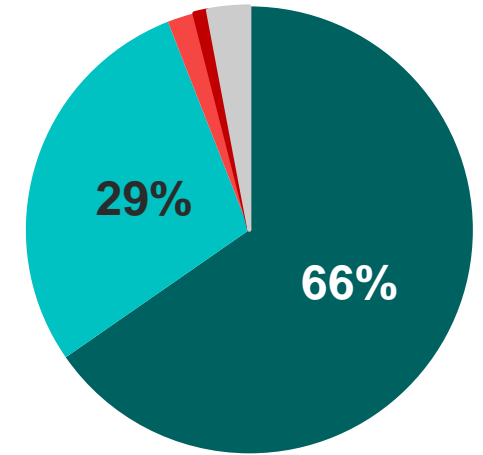
Michigan Registered Voters



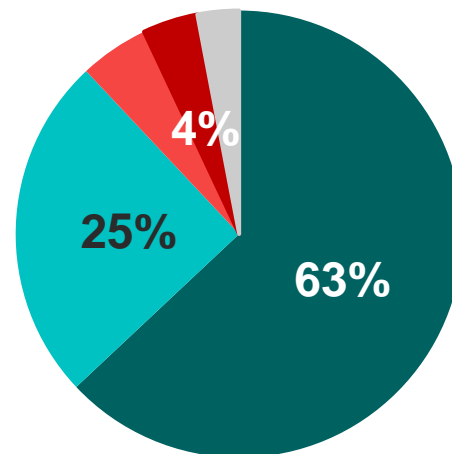
Ohio Registered Voters



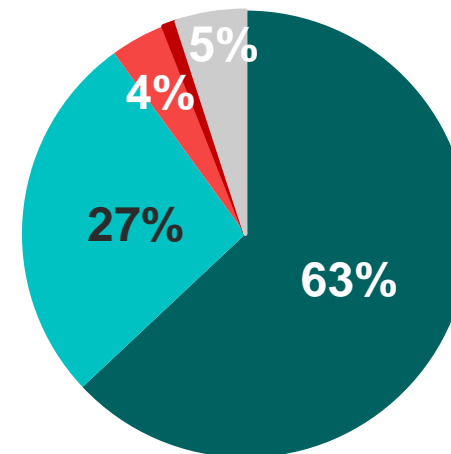
Pennsylvania Registered Voters



Texas Registered Voters



Wisconsin Registered Voters



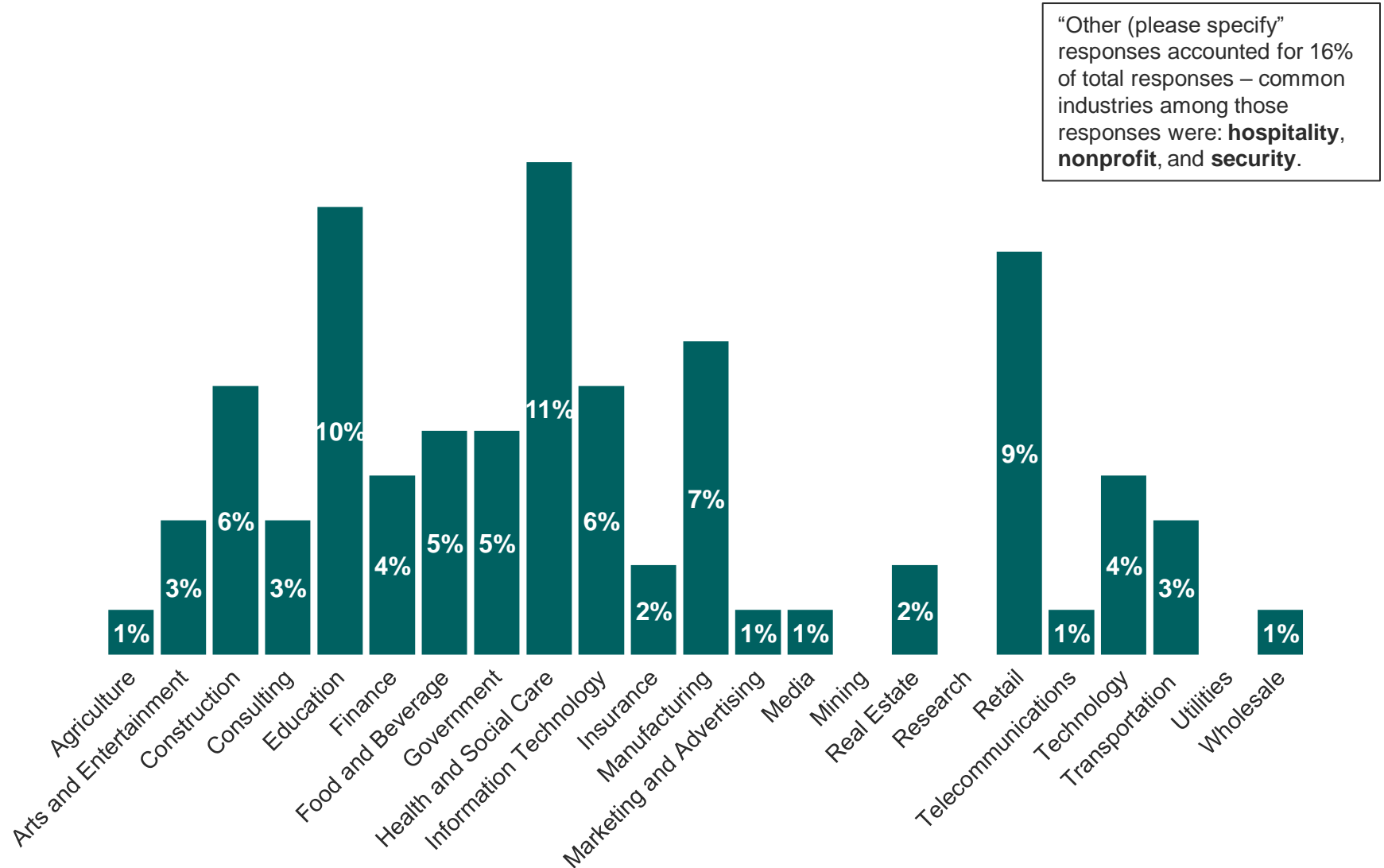
- Very important
- Somewhat important
- Not too important
- Not important at all
- Don't know/No opinion

The State of Manufacturing State-Specific Registered Voters

 MORNING CONSULT

Health and social care, education, and retail were the most common occupational fields among July respondents.

Which of the following categories best describe the industry or sector you work in?



The Politics + Policies of Manufacturing U.S. Registered Voters

July 2020 State Methodology Statements

Michigan Methodology: This poll was conducted between July 07-09, 2020 among a sample of 300 Registered Voters in Michigan. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, and educational attainment. Results from the full survey have a margin of error of +/- 6%.

Ohio Methodology: This poll was conducted between July 07-08, 2020 among a sample of 300 Registered Voters in Ohio. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, and educational attainment. Results from the full survey have a margin of error of +/- 6%.

Pennsylvania Methodology: This poll was conducted on July 07-08, 2020 among a sample of 300 Registered Voters in Pennsylvania. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, and educational attainment. Results from the full survey have a margin of error of +/- 6%.

Wisconsin Methodology: This poll was conducted between July 07-09, 2020 among a national sample of 300 Registered Voters in Wisconsin. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, and educational attainment. Results from the full survey have a margin of error of +/- 6%.

Texas Methodology: This poll was conducted between July 07-08, 2020 among a sample of 300 Registered Voters in Texas. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, and educational attainment. Results from the full survey have a margin of error of +/- 6%.

Appendix

January 2020 State Methodology Statements

Michigan Methodology: This poll was conducted between January 02-04, 2020 among a sample of 300 Registered Voters in Michigan. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, and educational attainment. Results from the full survey have a margin of error of +/- 6%.

Ohio Methodology: This poll was conducted between January 02-03, 2020 among a sample of 300 Registered Voters in Ohio. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, and educational attainment. Results from the full survey have a margin of error of +/- 6%.

Pennsylvania Methodology: This poll was conducted on January 02, 2020 among a sample of 300 Registered Voters in Pennsylvania. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, and educational attainment. Results from the full survey have a margin of error of +/- 6%.

Wisconsin Methodology: This poll was conducted between January 02-06, 2020 among a national sample of 300 Registered Voters in Wisconsin. The interviews were conducted online, and the results were weighted to approximate the population based on age, gender, race, and educational attainment. Results from the full survey have a margin of error of +/- 6%.

Appendix