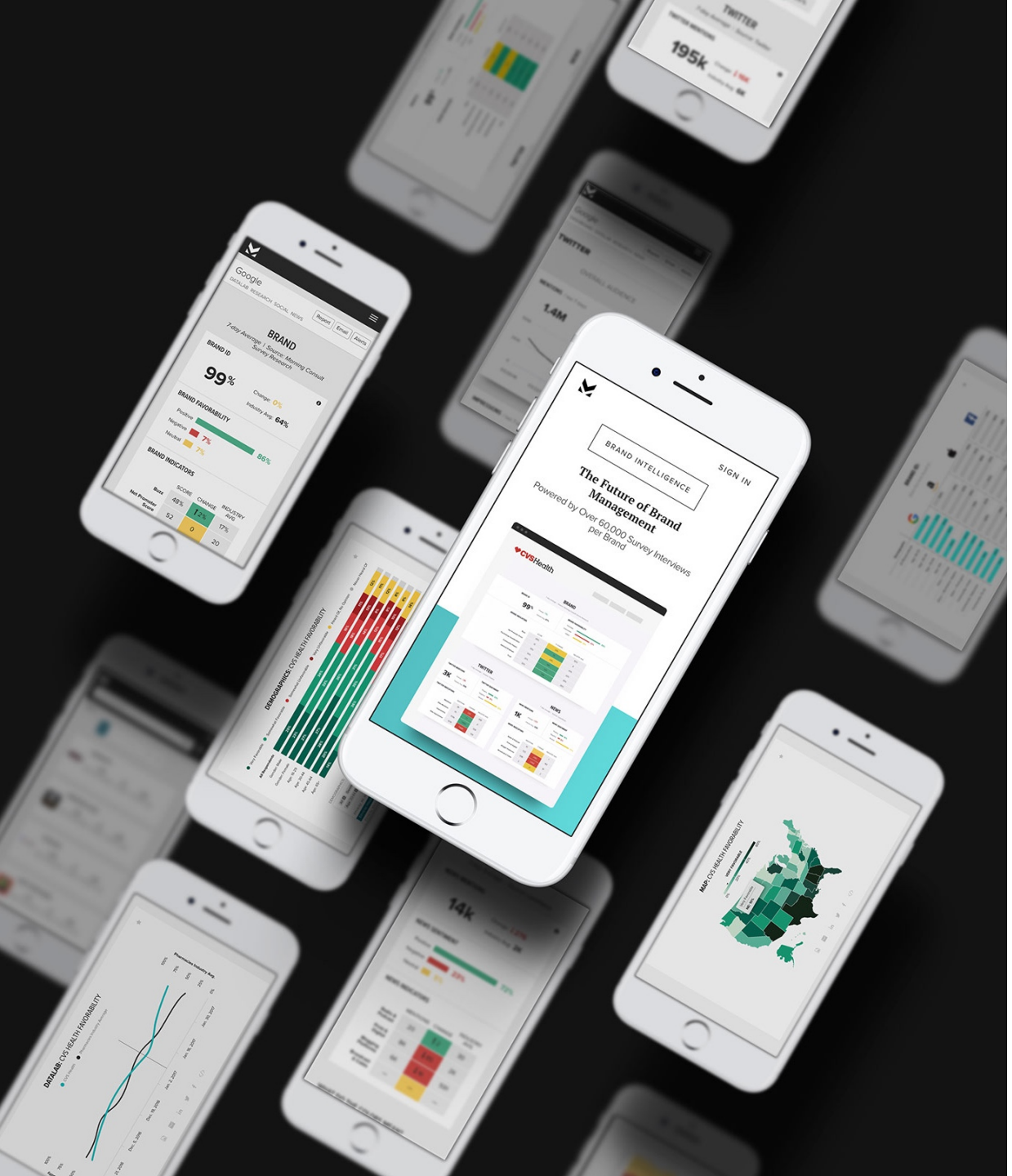

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AEM
Association of
Equipment Manufacturers

MANUFACTURING POLL

Association of Equipment Manufacturers

JANUARY 2020

Key Points

1

Seventy-six percent of registered voters say the issue of manufacturing is important when it comes to deciding which presidential candidates to vote for in 2020.

- Seventy-seven percent of Michigan voters, 77% of Ohio voters, 80% of Pennsylvania voters, and 76% of Wisconsin voters say manufacturing policy is important when it comes to deciding which presidential candidate to vote for in 2020.

2

A strong majority of voters believe manufacturing is *critical* or *important* to the U.S. economy and job market.

- Sixty-one percent of voters say manufacturing is *critical* to the U.S. economy, and an additional 30% say it is *important* to the economy.
- Additionally, 64% of voters believe manufacturing is *critical* to the U.S. job market, with an additional 28% reporting it is *important* to the job market.
- In Michigan and Pennsylvania 95% of voters report that manufacturing is *critical* or *important* to the U.S. economy, and in Ohio and Wisconsin, 93% of voters say the same.

3

In thinking about what sectors politicians should home in on to focus on job creation, 1 in 5 voters (18%) rank manufacturing as the #1 sector to focus on.

- This falls behind only agriculture (21%, #1) and health/social care (19%, #1).
- In Michigan, Ohio, and Wisconsin, manufacturing has the highest percentage #1 selection, surpassing all other industries as the #1 place where politicians should focus on job creation.

4

No party has yet to be viewed as the champion of manufacturing.

- Looking to the future, 34% of voters believe that Democrats will be the champion of manufacturing while, 37% of believe Republicans will be the champion.
- Voters are also divided along party lines on President Trump's job performance in keeping, bringing and increasing manufacturing jobs.
- Michigan voters are more likely to believe that Democrats will be a better champion for manufacturing in the future, while voters in Ohio and Pennsylvania are more confident in Republicans championing manufacturing in the future. Wisconsin voters are split.

Methodology

National Data: This poll was conducted between January 02-03, 2020 among a national sample of 2025 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%.

**See appendix for state methodology statements.*

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1 Top Issues in 2020

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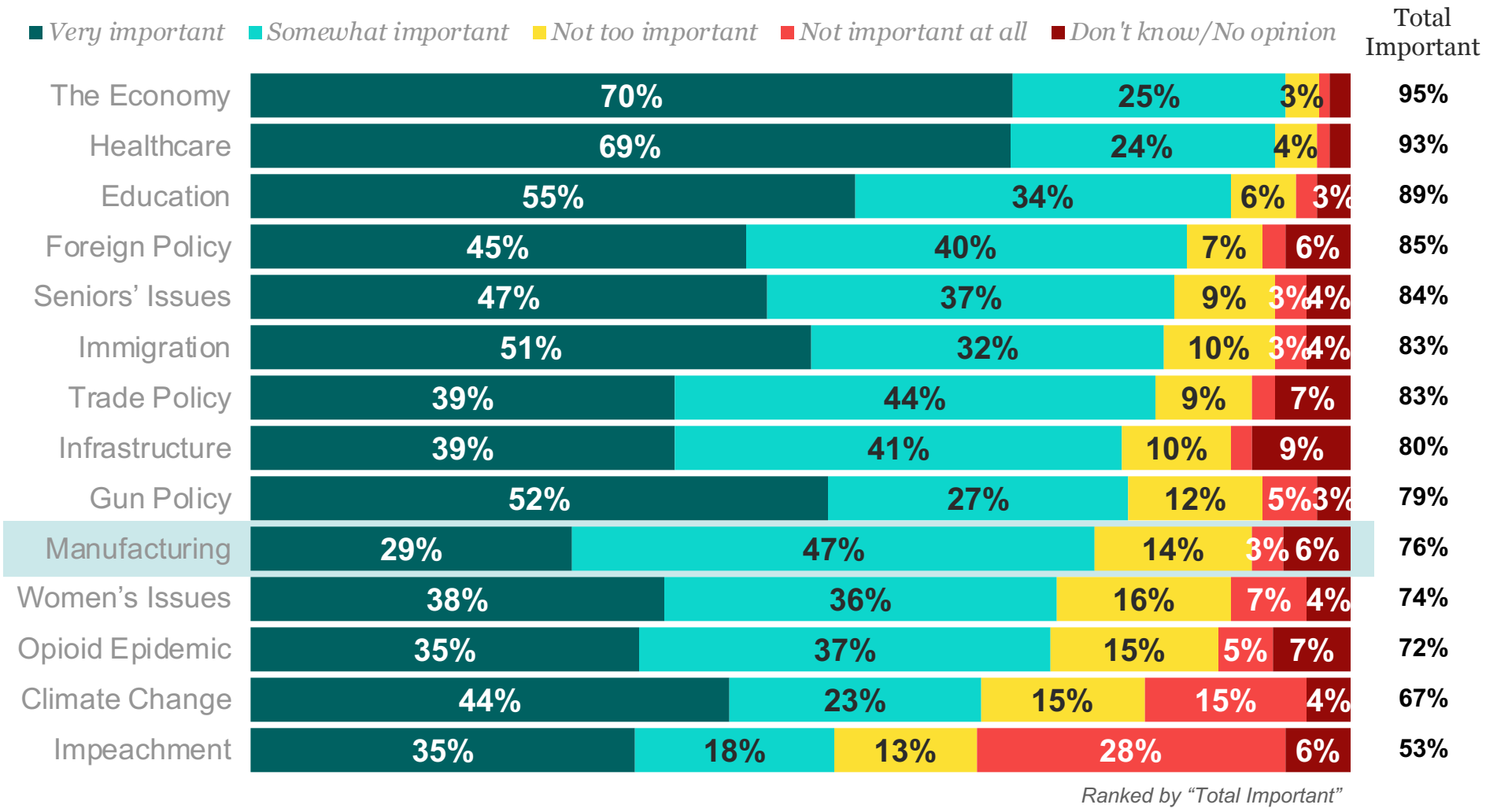
Top Issues in 2020

U.S. Registered Voters

Thinking about what issues are most important to voters when it comes to casting their vote for president, healthcare and the economy receive the most "total important" ratings.

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"

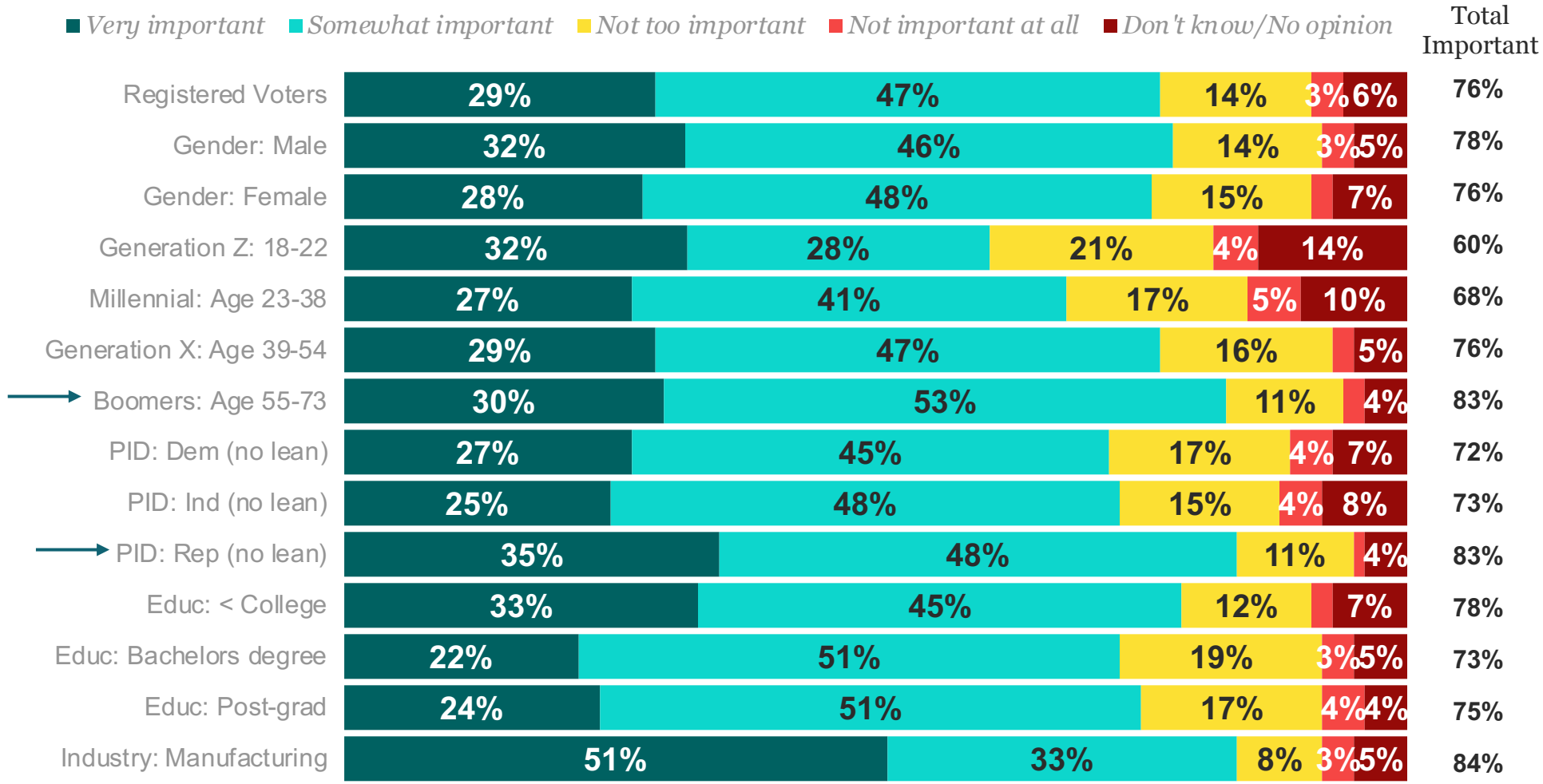
Top Issues in 2020

U.S. Registered Voters

Looking at how important manufacturing will be, specifically, this is an issue area that is important to a large swath of voters, but that stands out more with older voters and Republican voters.

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



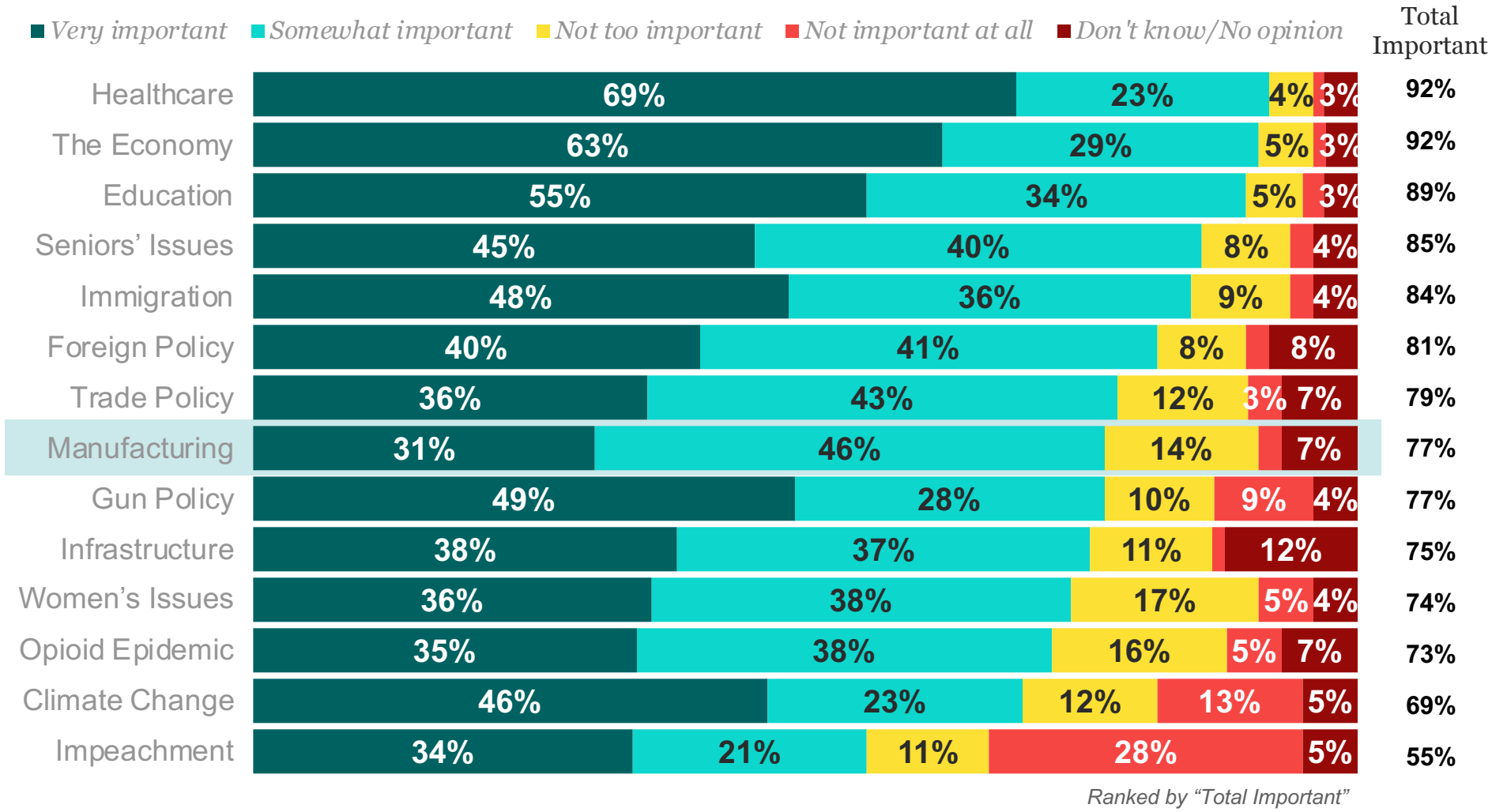
Top Issues in 2020

Michigan Registered Voters

In Michigan, healthcare edges out on the economy, with 69% of Michiganders selecting healthcare as a very important issue compared to 63% selecting the economy as a very important issue.

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"

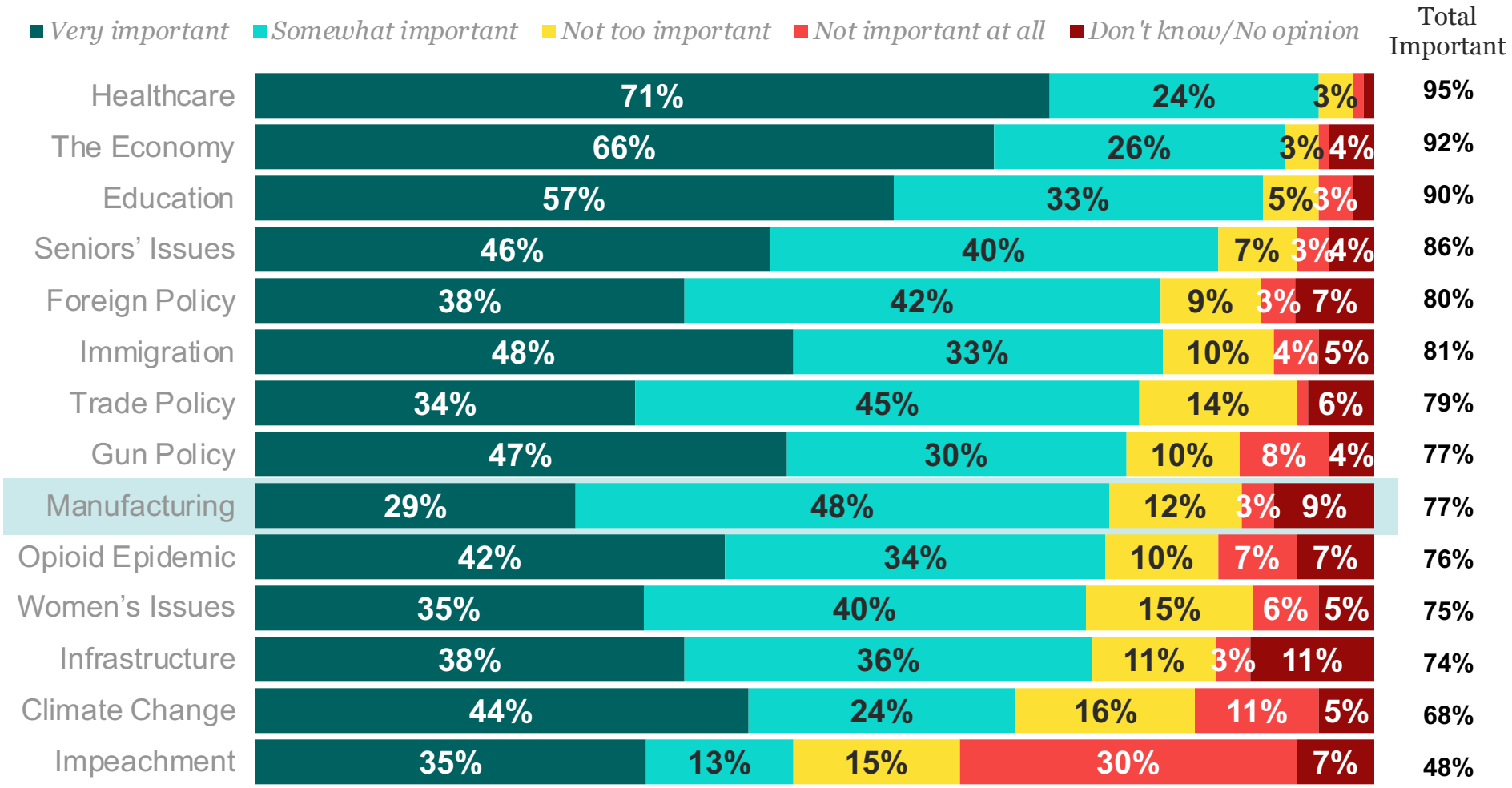
Top Issues in 2020

Ohio Registered Voters

Healthcare also edges out the economy as the top important issue in Ohio.

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"

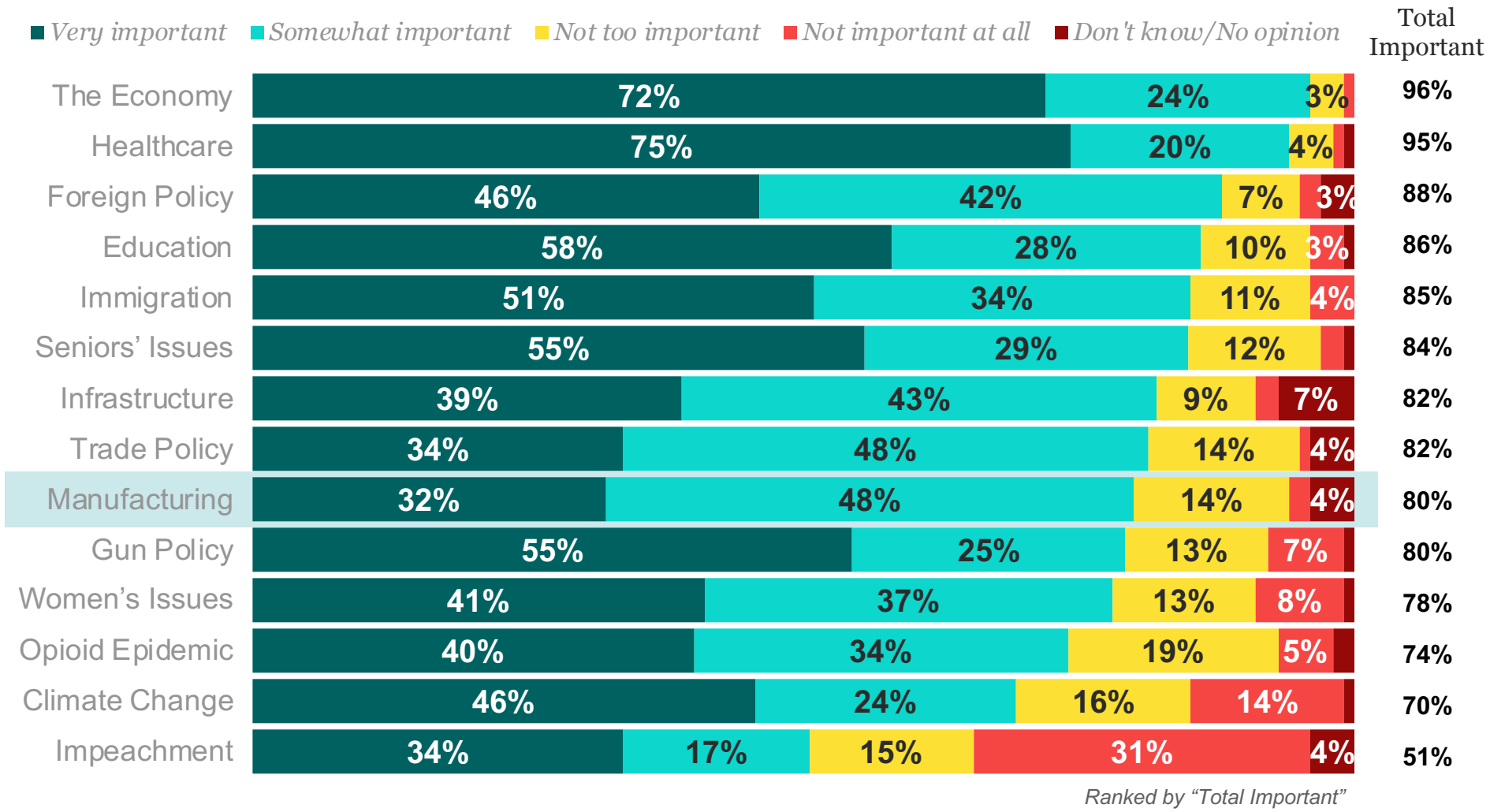
Top Issues in 2020

Pennsylvania Registered Voters

Across the national sample and state oversamples, the highest level of "total importance" for manufacturing is in Pennsylvania (80% total 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"

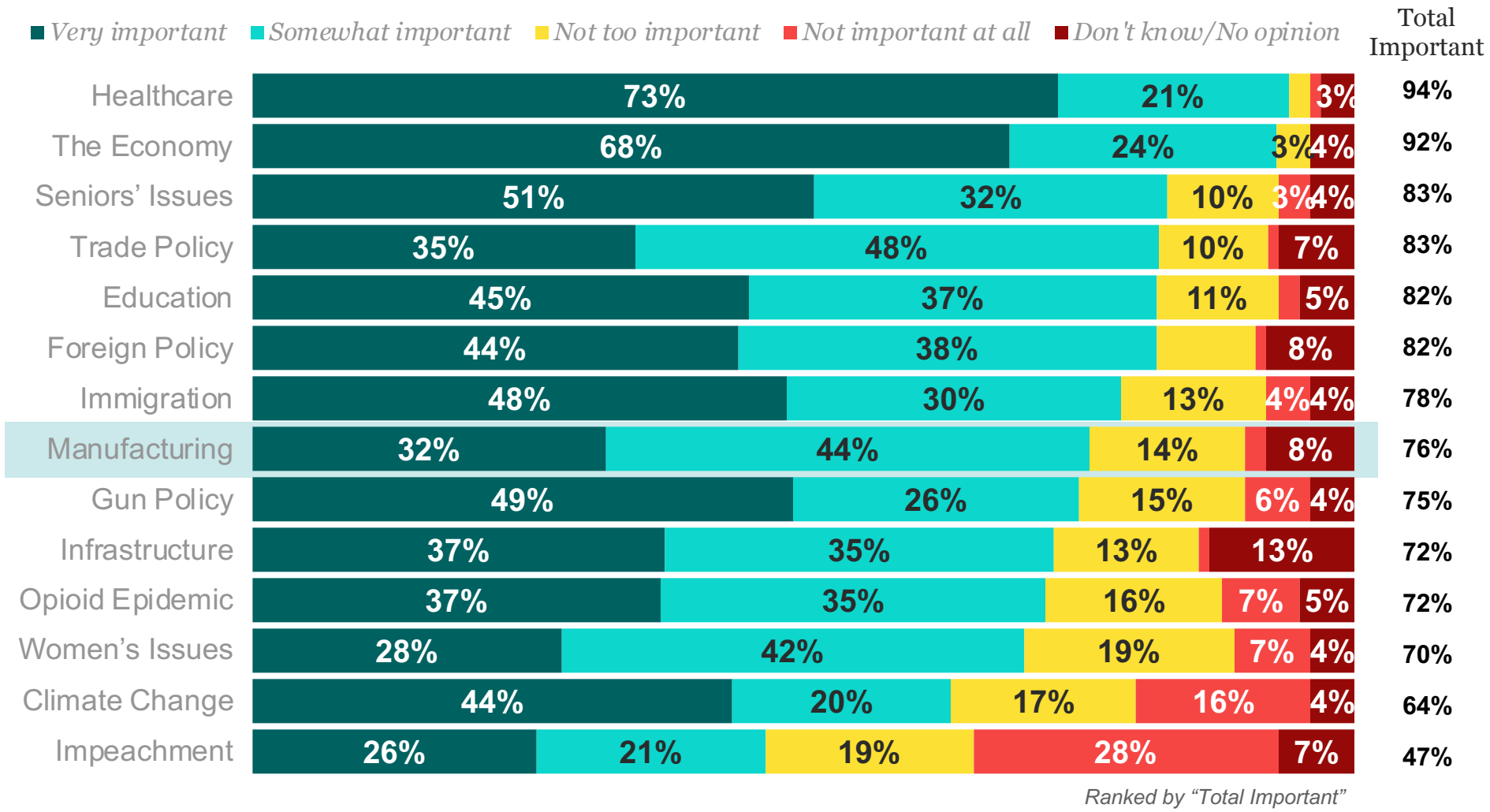
Top Issues in 2020

Wisconsin Registered Voters

In Wisconsin, healthcare also edges out the economy for the top issue spot, with 73% of Wisconsin voters saying healthcare will 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"

Contents

1 Top Issues in 2020

2 The State of Manufacturing

3 The Politics and Policies of Manufacturing

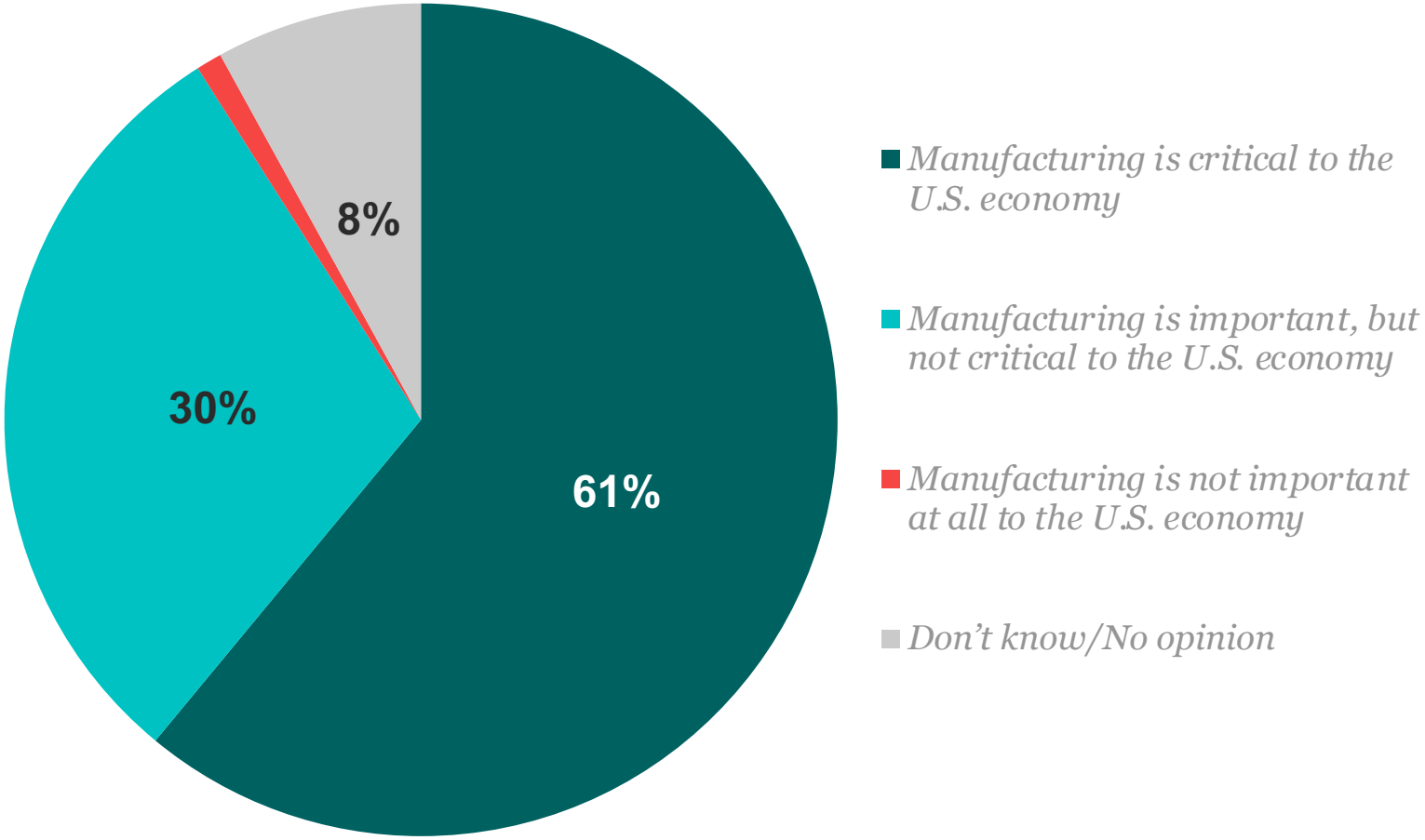
The State of Manufacturing

U.S. Registered Voters

In thinking of the economy as a top issue for voters, 9 in 10 (91%) voters see the manufacturing sector as *critical*, or *important*, to the U.S. economy.

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



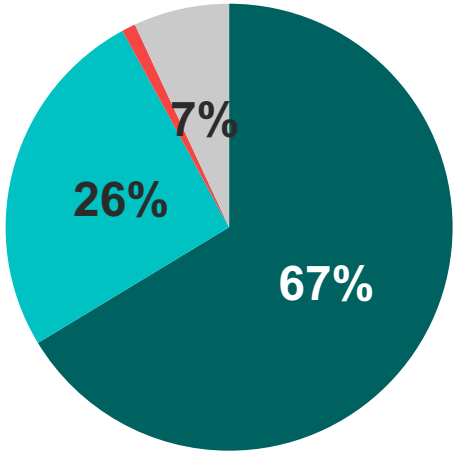
The State of Manufacturing

State-Specific Registered Voters

Across all state oversamples, the critical role manufacturing plays in the economy is recognized in responses.

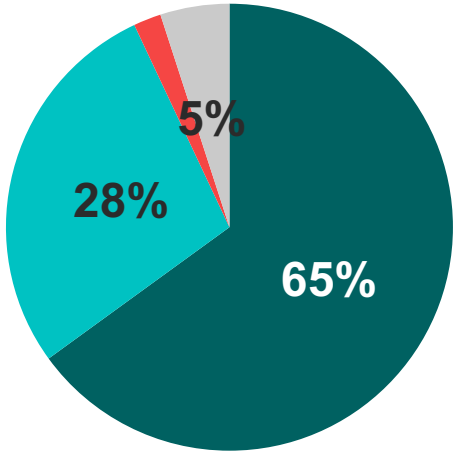
In thinking about **the role of manufacturing in the U.S. economy**, which of the following comes closest to your view?

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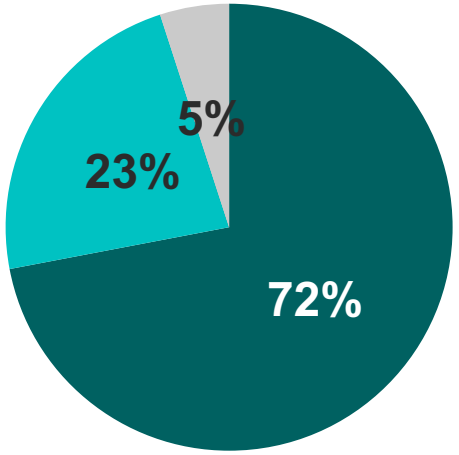
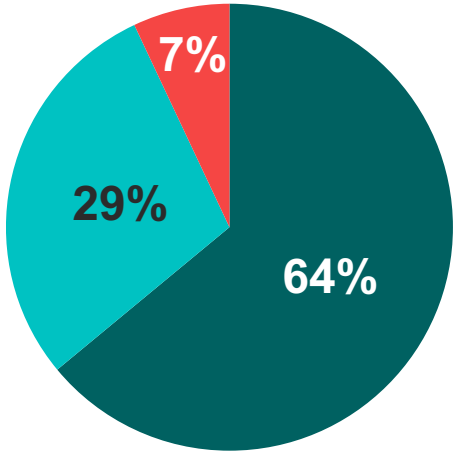
- *Manufacturing is not important at all to the U.S. economy*
- *Don't know/No opinion*

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*

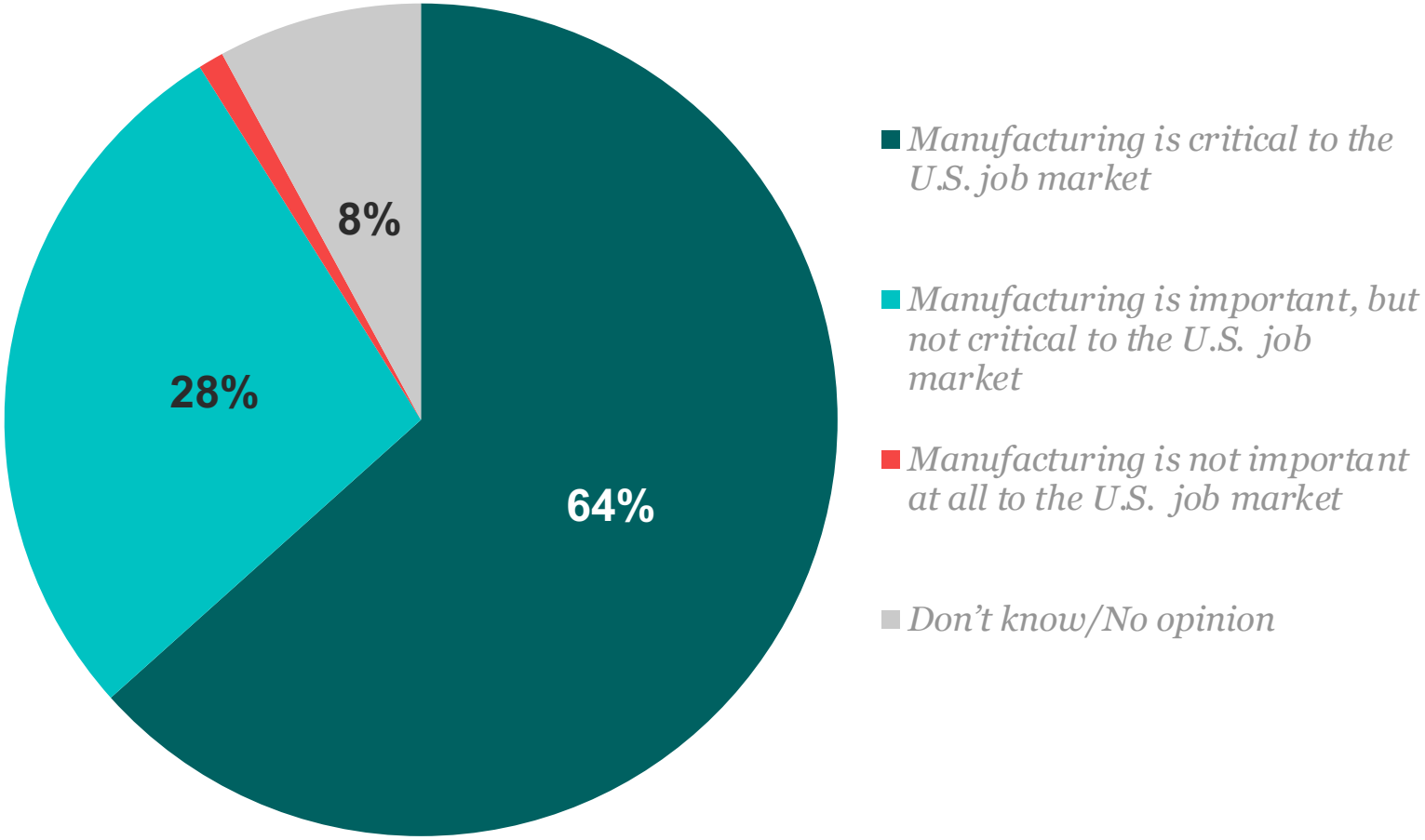
The State of Manufacturing

U.S. Registered Voters

Nine in 10 (92%) respondents say manufacturing is *critical* or *important* 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?

U.S. Registered Voters



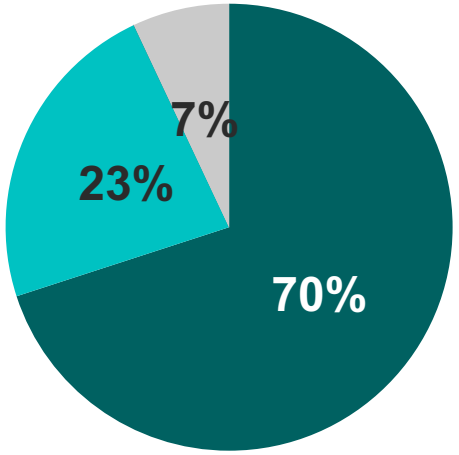
The State of Manufacturing

State-Specific Registered Voters

In Michigan, Pennsylvania, and Wisconsin, 0% of voters believe that "manufacturing is *not important at all* to the U.S. job market." And, in Ohio, that selection is just 2%.

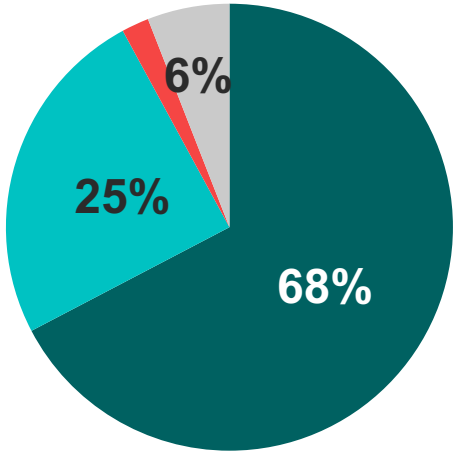
And, in thinking about **the role of manufacturing in the U.S. job market**, which of the following comes closest to your view?

Michigan Registered Voters



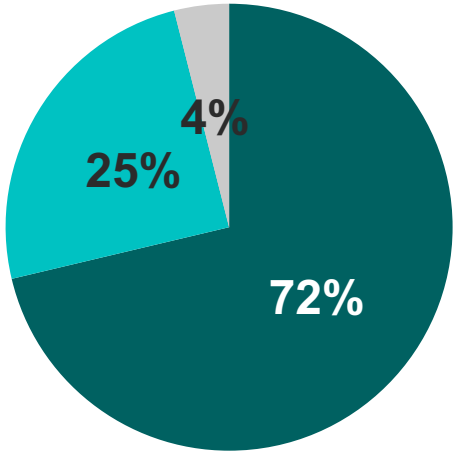
- *Manufacturing is critical to the U.S. job market*
- *Manufacturing is important, but not critical to the U.S. job market*
- *Manufacturing is not important at all to the U.S. job market*
- *Don't know/No opinion*

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



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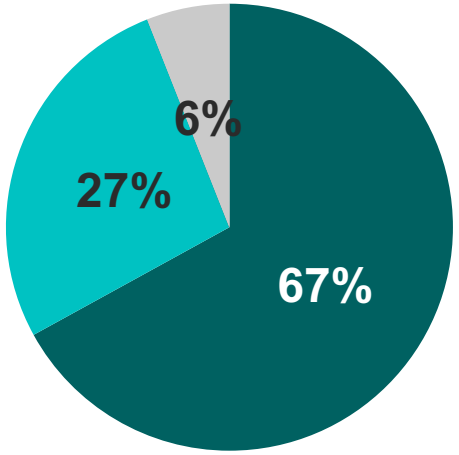
- *Manufacturing is not important at all to the U.S. job market*
- *Don't know/No opinion*

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*

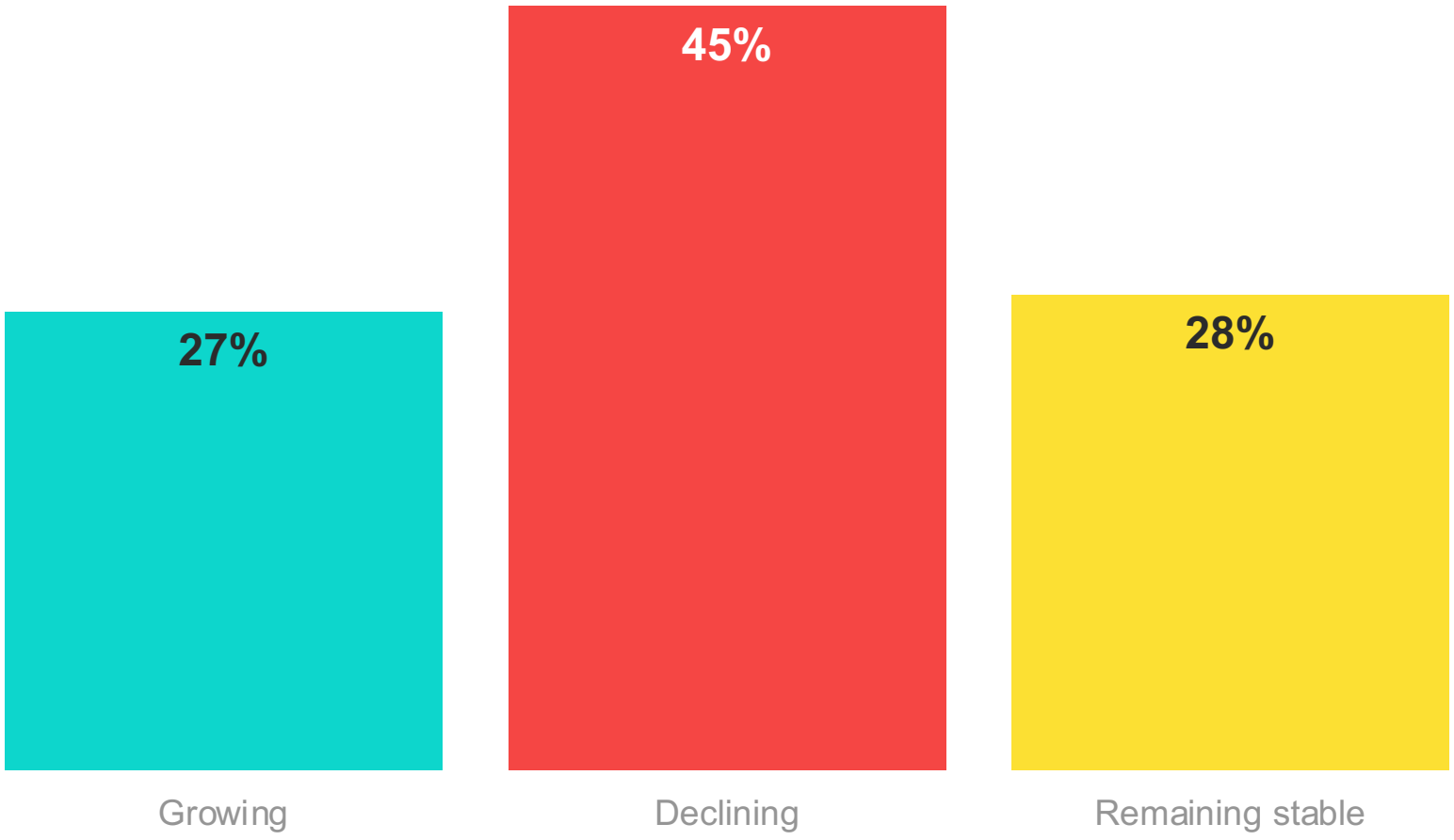
The State of Manufacturing

U.S. Registered Voters

A plurality of voters (45%) believe that manufacturing in the U.S. is a declining 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



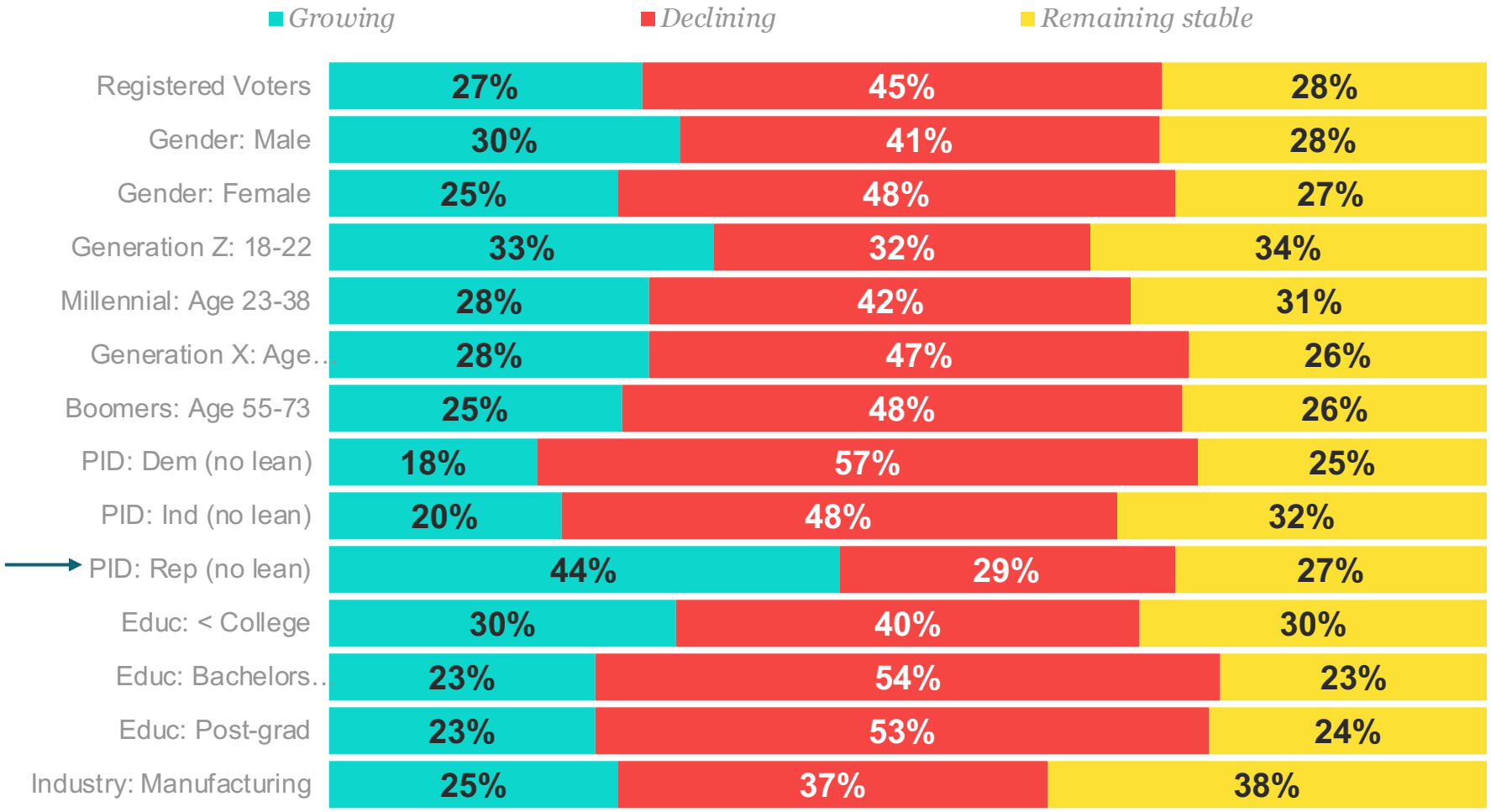
The State of Manufacturing

U.S. Registered Voters

More Republicans believe that manufacturing in the U.S. is a growing sector than believe manufacturing is a declining 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



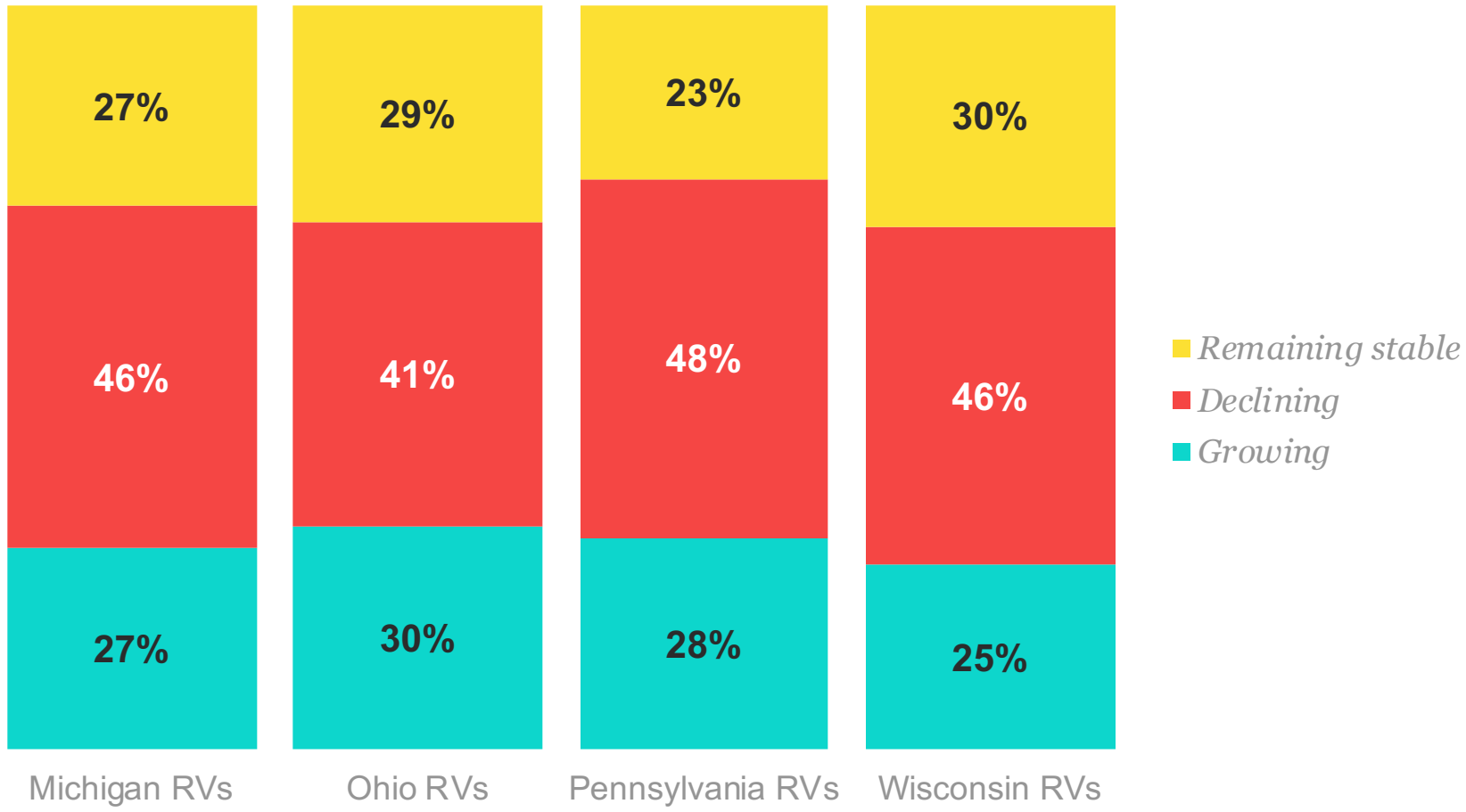
The State of Manufacturing

State-Specific Registered Voters

Across the select states, more voters believe that manufacturing is declining than believe manufacturing is 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



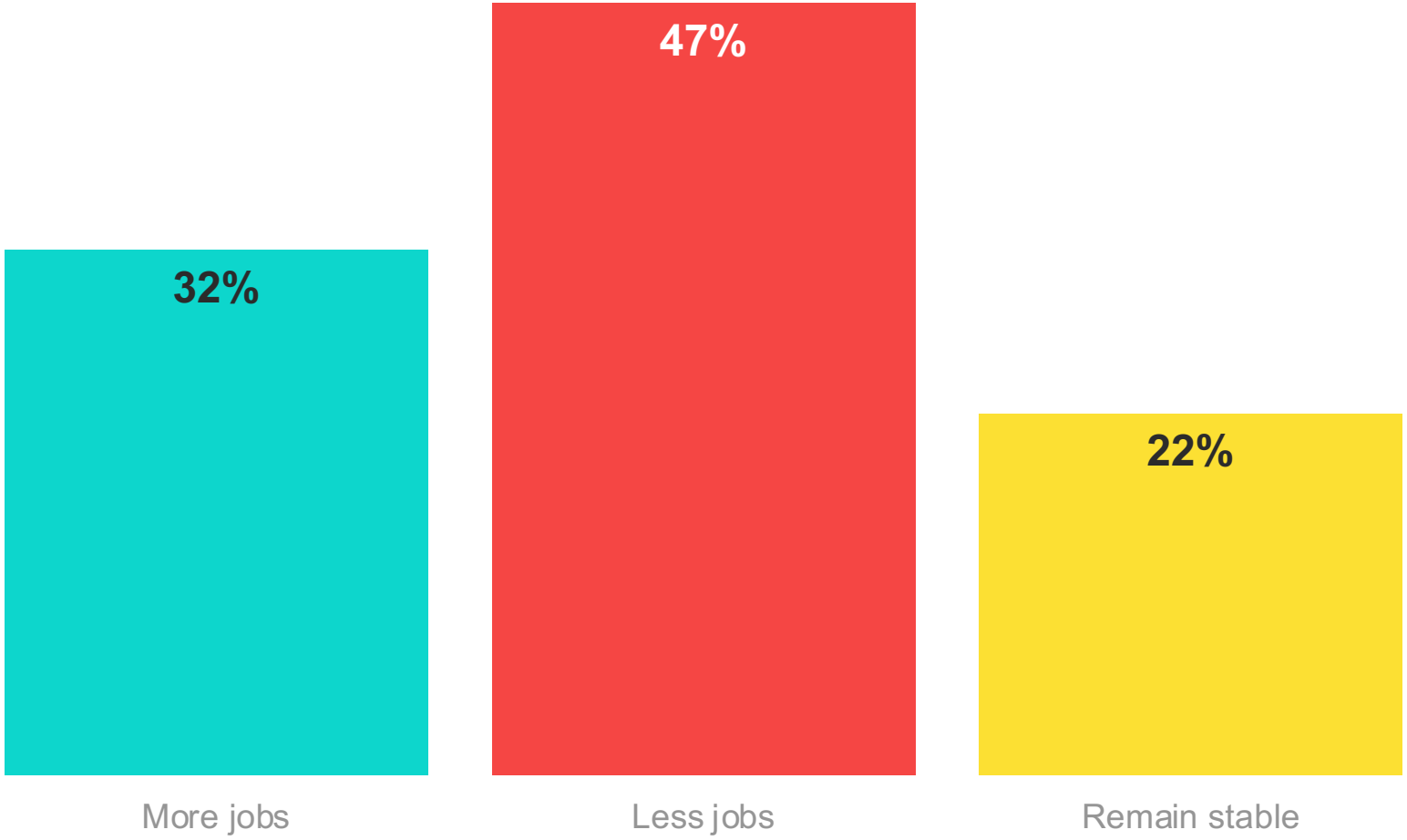
The State of Manufacturing

U.S. Registered Voters

Similarly, a plurality of American voters (47%) believe there will be less jobs in manufacturing 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



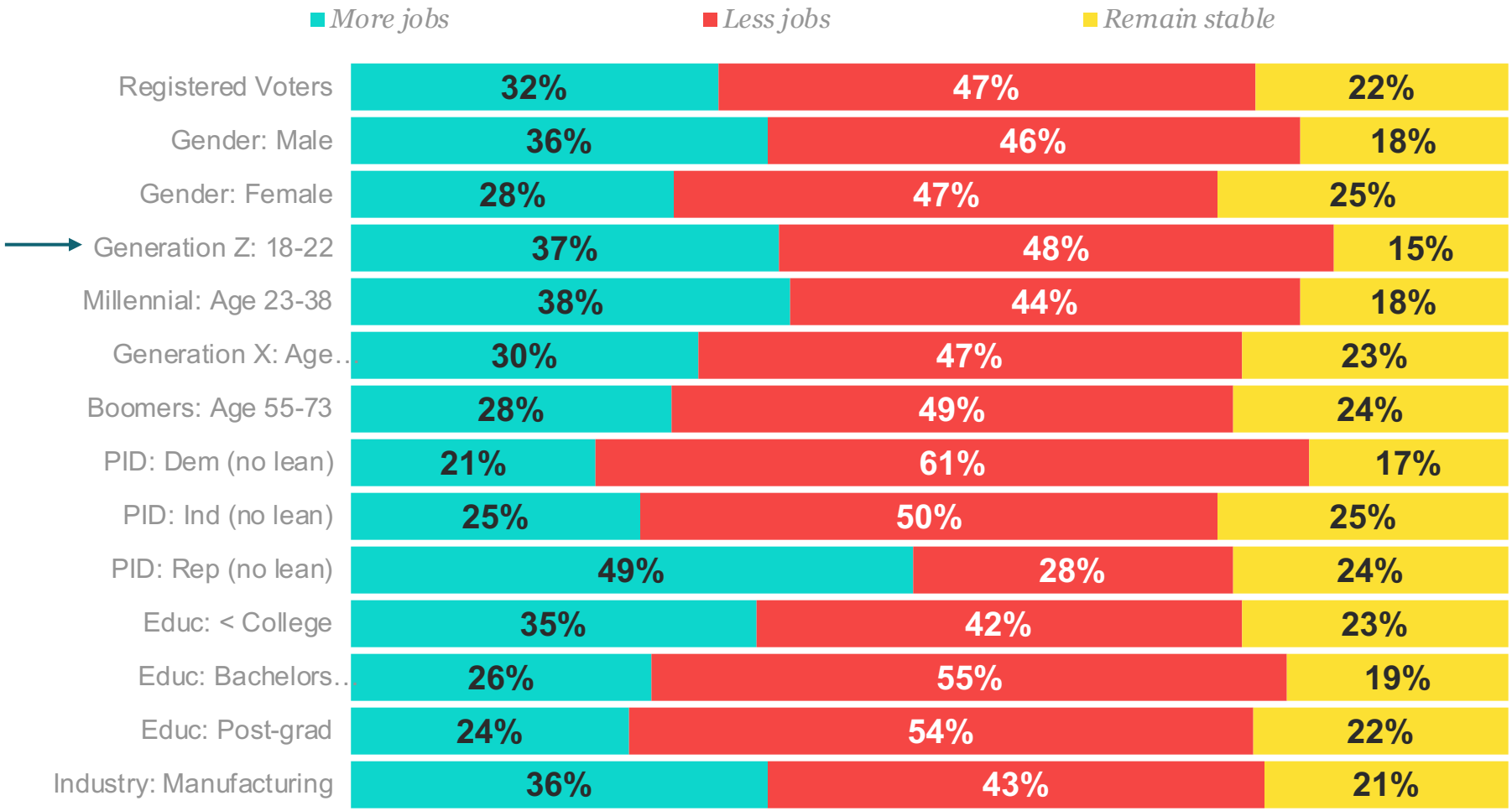
The State of Manufacturing

U.S. Registered Voters

Generation Z is split on whether manufacturing is growing or declining (33% growing vs. 32% declining), but when it comes to future jobs, the age cohort is more cynical, with 48% believing there will be less jobs in manufacturing 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?

U.S. Registered Voters



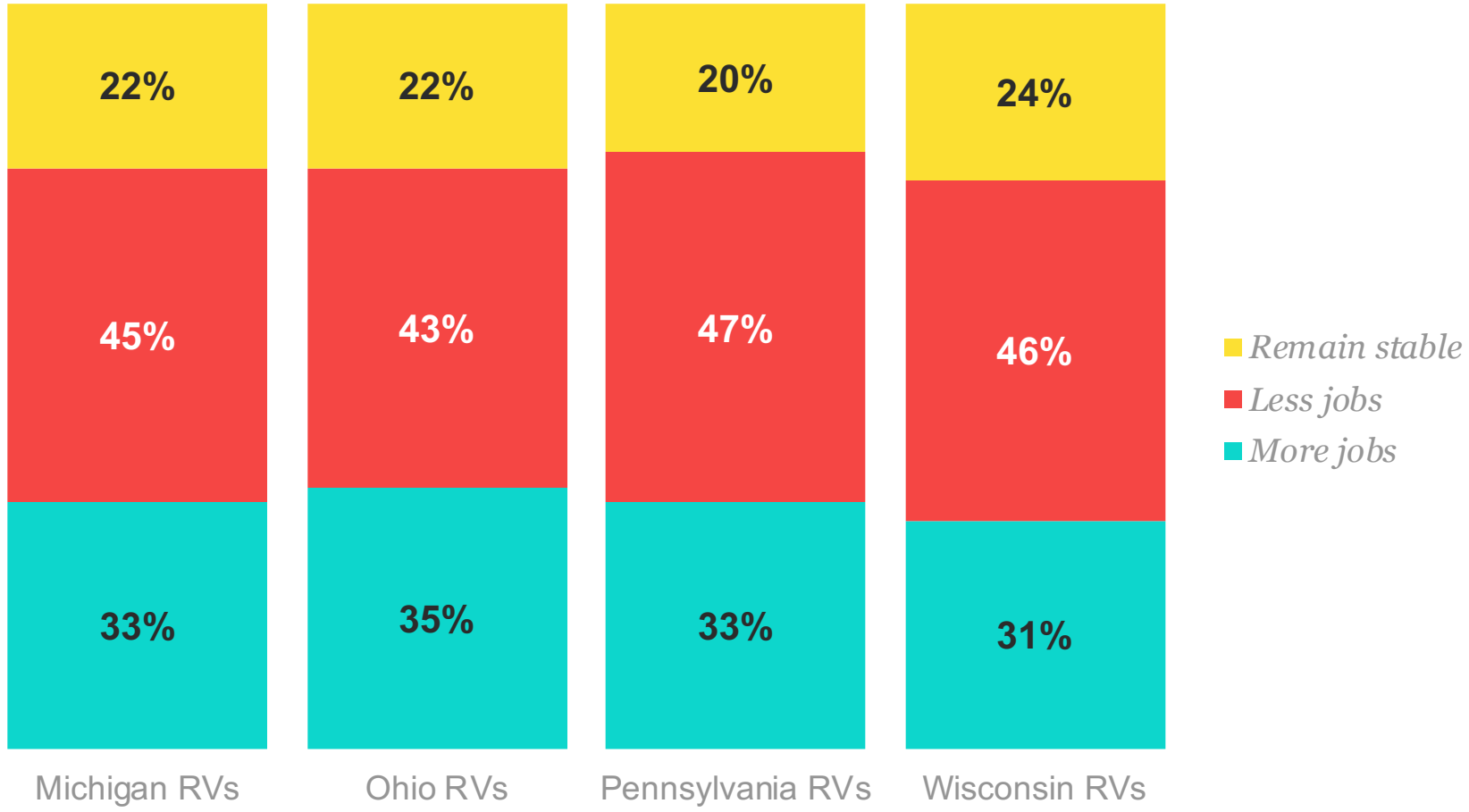
The State of Manufacturing

State-Specific Registered Voters

In Michigan, Ohio, Pennsylvania, and Wisconsin, 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



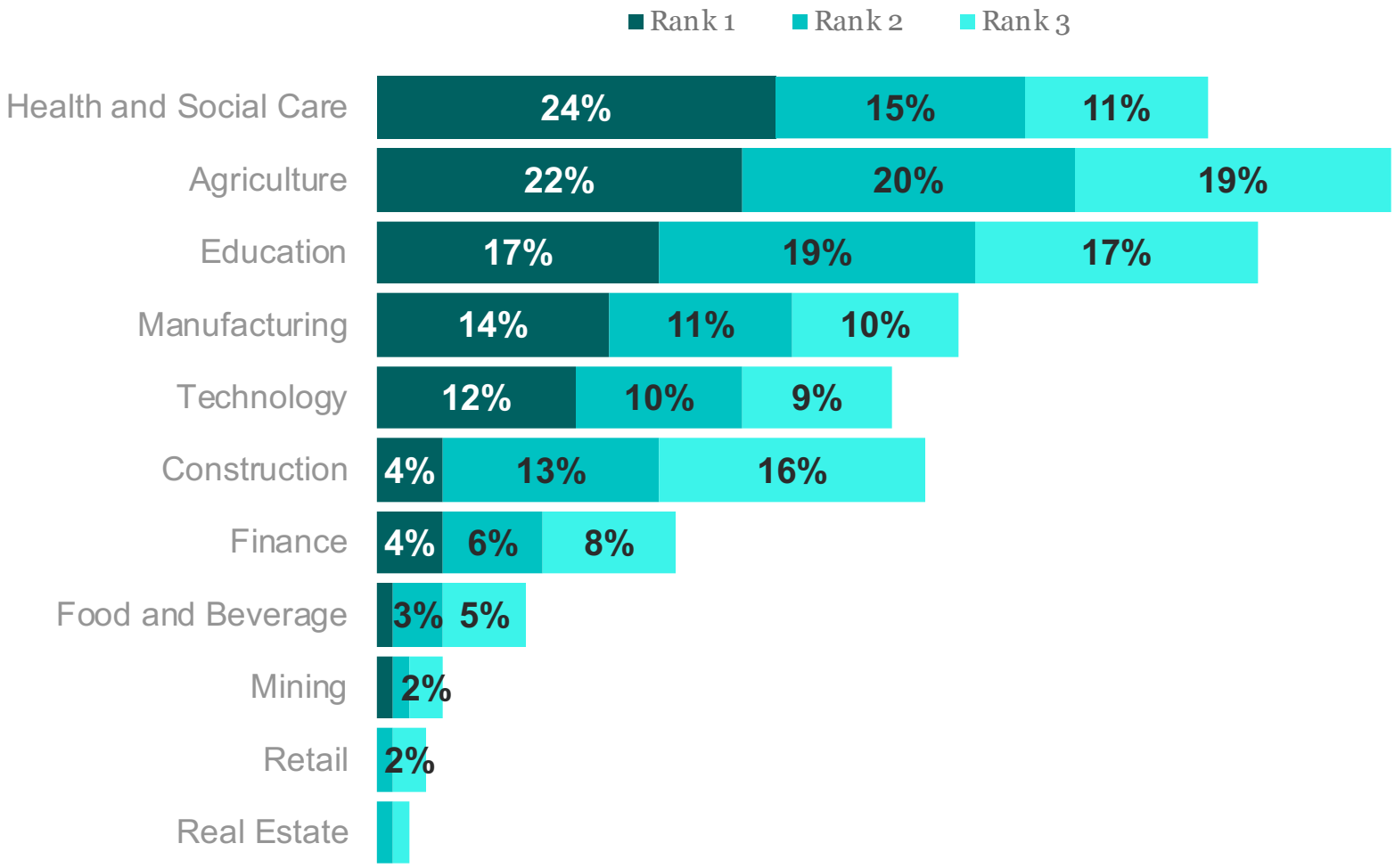
The State of Manufacturing

U.S. Registered Voters

In thinking about how political candidates should prioritize the protection of jobs, healthcare receives the most #1 rankings, while agriculture receives the most top 3 rankings.

Thinking about American jobs, how do you think a candidate running for office should prioritize the **protection of jobs** in the following sectors? *Rank the sectors such that the sector ranked "1" is the top priority for job protection, and the sector ranked "11" is the lowest priority for job protection.*

U.S. Registered Voters



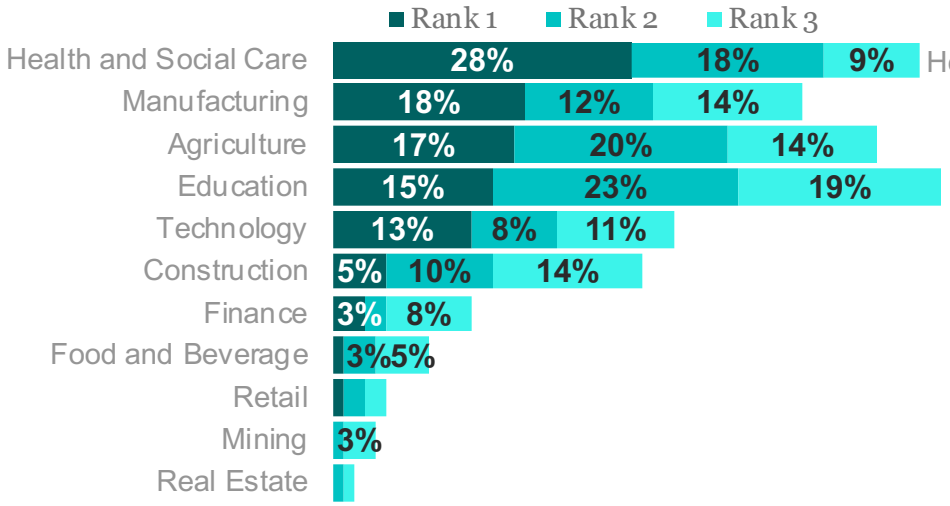
The State of Manufacturing

State-Specific Registered Voters

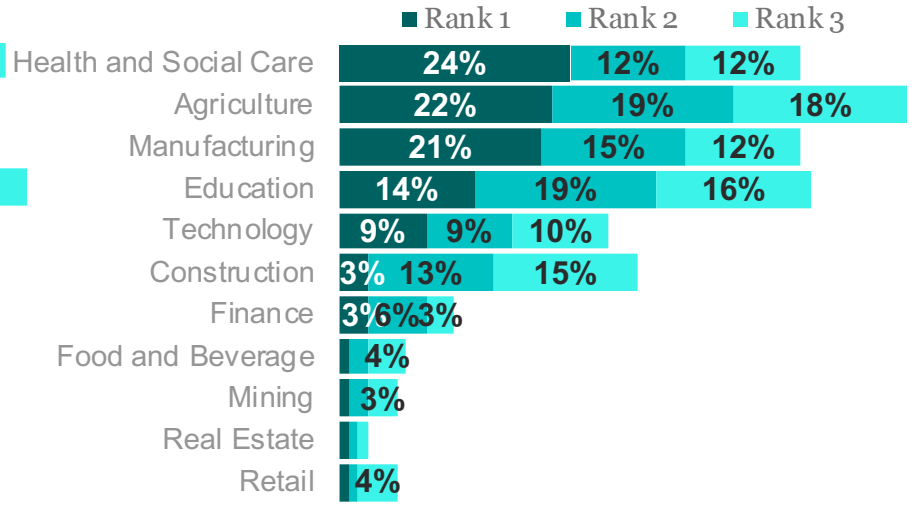
In Wisconsin, manufacturing ties with agriculture as the #1, top priority for job protection.

Thinking about American jobs, how do you think a candidate running for office should prioritize the **protection of jobs** in the following sectors? *Rank the sectors such that the sector ranked "1" is the top priority for job protection, and the sector ranked "11" is the lowest priority for job protection.*

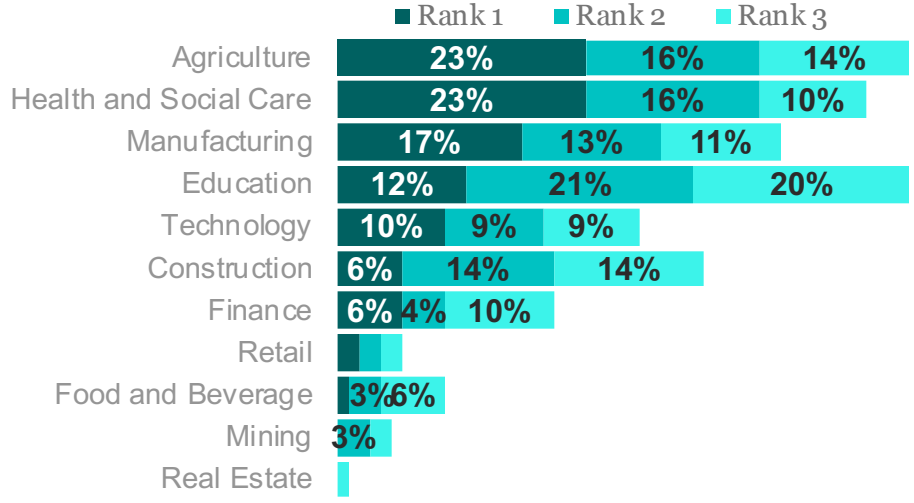
Michigan Registered Voters



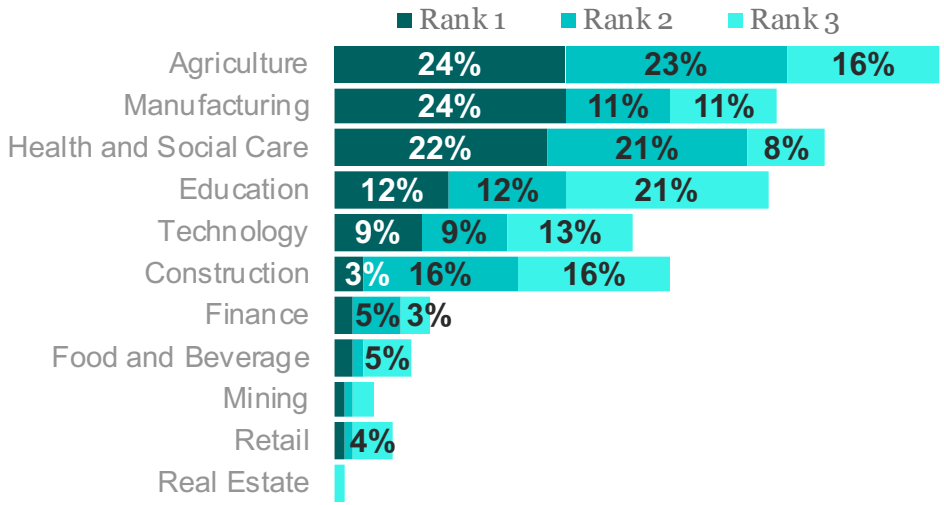
Ohio Registered Voters



Pennsylvania Registered Voters



Wisconsin Registered Voters



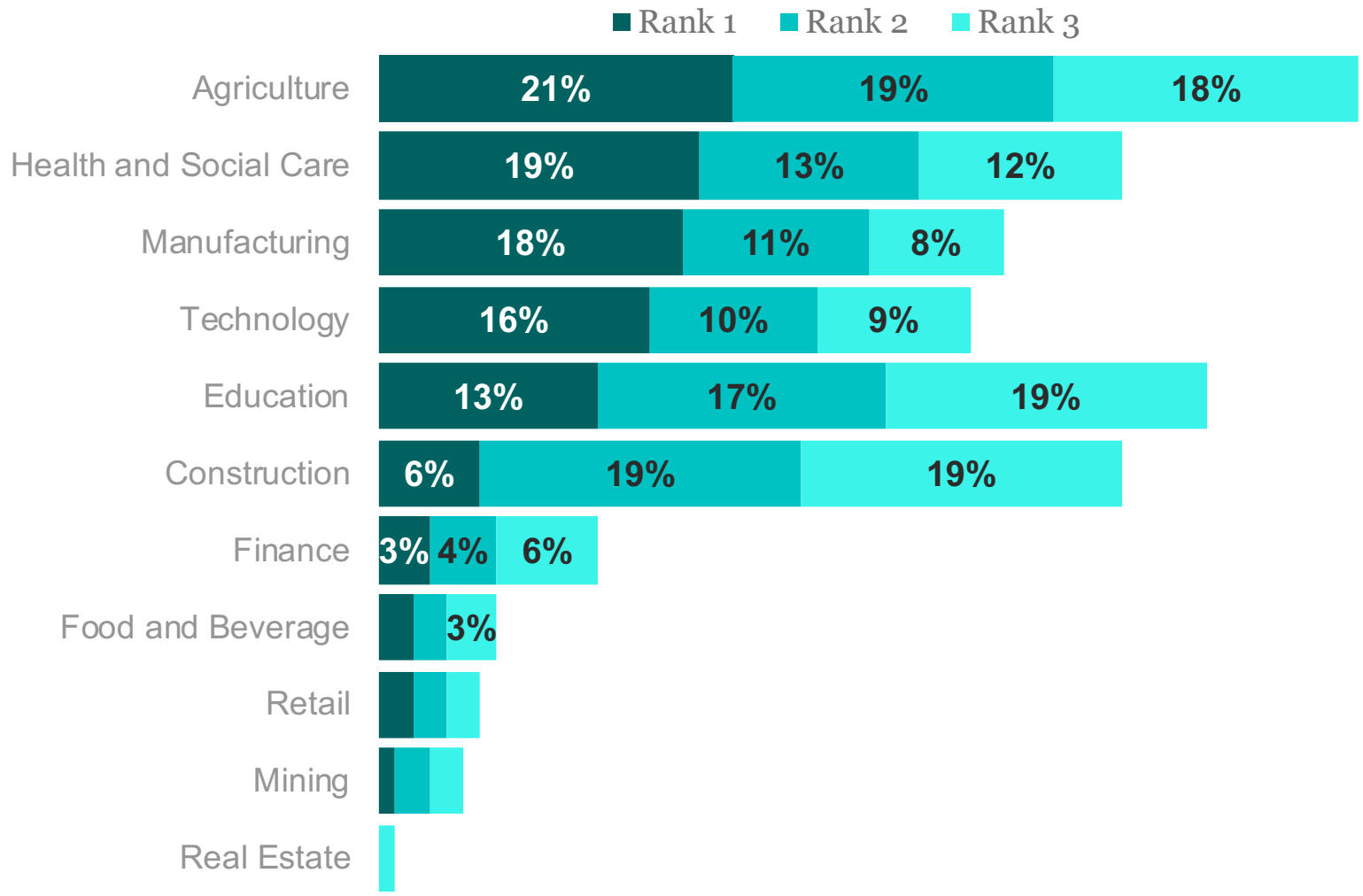
The State of Manufacturing

U.S. Registered Voters

In thinking about this as *job creation* rather than as *job protection*, agriculture rises more definitively to the top.

And, thinking about American jobs, how do you think a candidate running for office should prioritize the **creation of jobs** in the following sectors? *Rank the sectors such that the sector ranked "1" is the top priority for job creation, and the sector ranked "11" is the lowest priority for job creation.*

U.S. Registered Voters



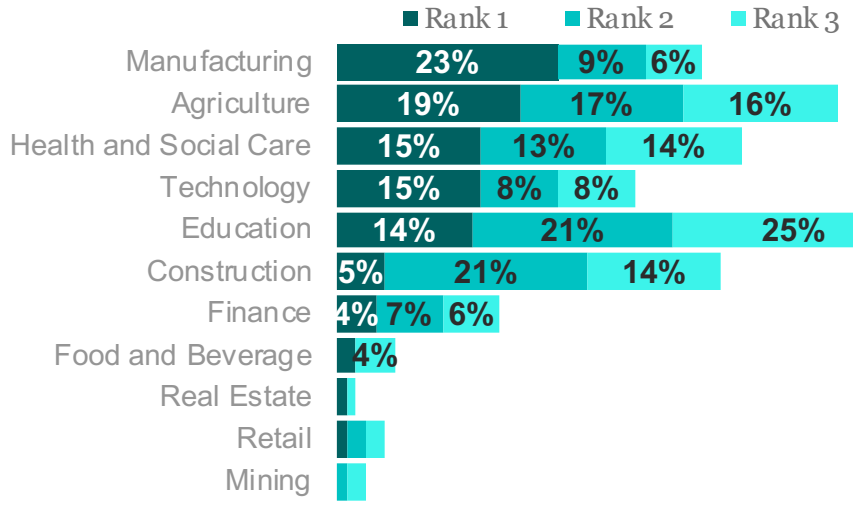
The State of Manufacturing

State-Specific Registered Voters

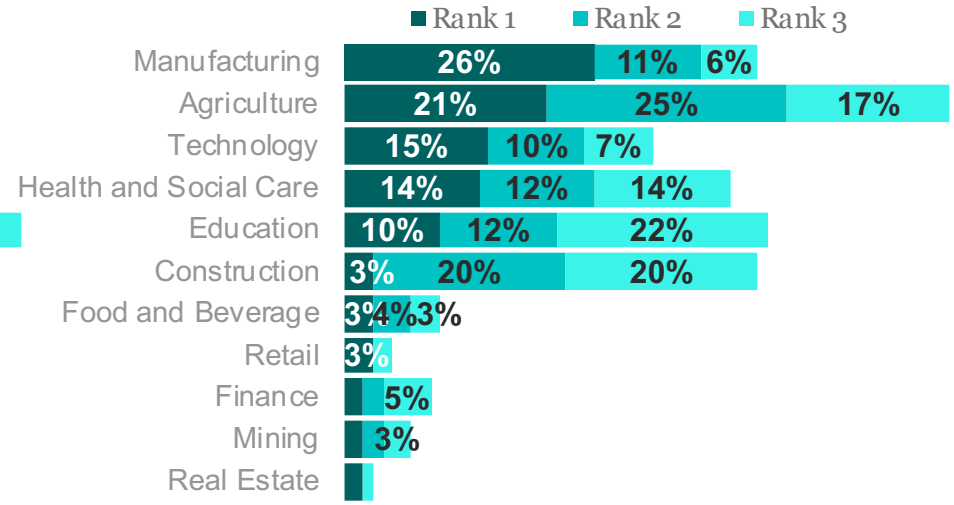
In Michigan, Ohio, and Wisconsin, manufacturing has the highest percentage of #1 rankings.

And, thinking about American jobs, how do you think a candidate running for office should prioritize the **creation of jobs** in the following sectors? *Rank the sectors such that the sector ranked "1" is the top priority for job creation, and the sector ranked "11" is the lowest priority for job creation.*

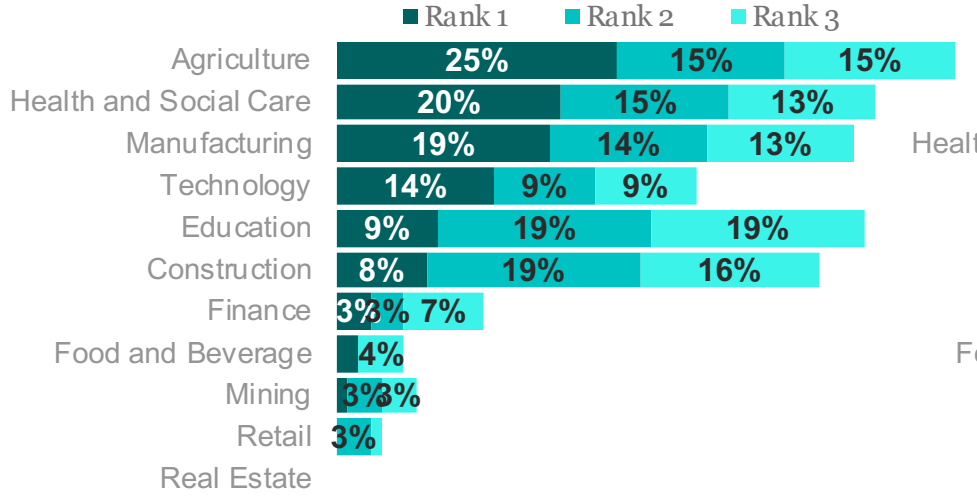
Michigan Registered Voters



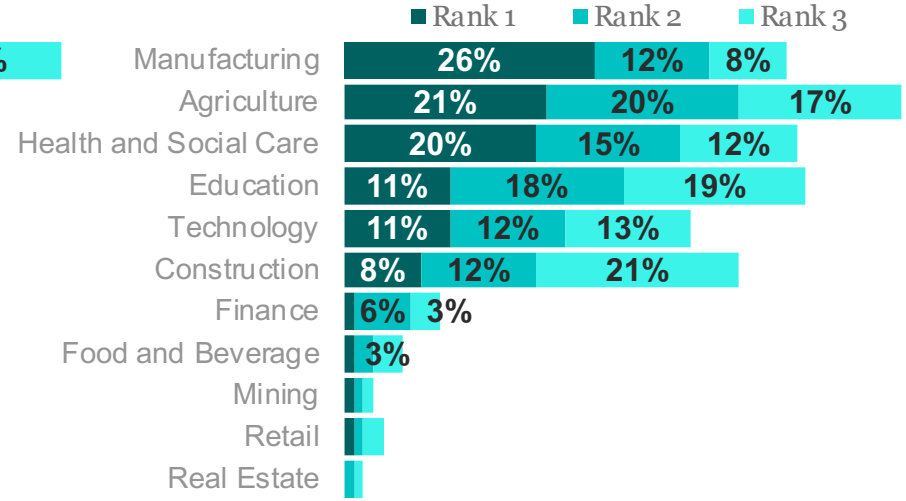
Ohio Registered Voters



Pennsylvania Registered Voters



Wisconsin Registered Voters



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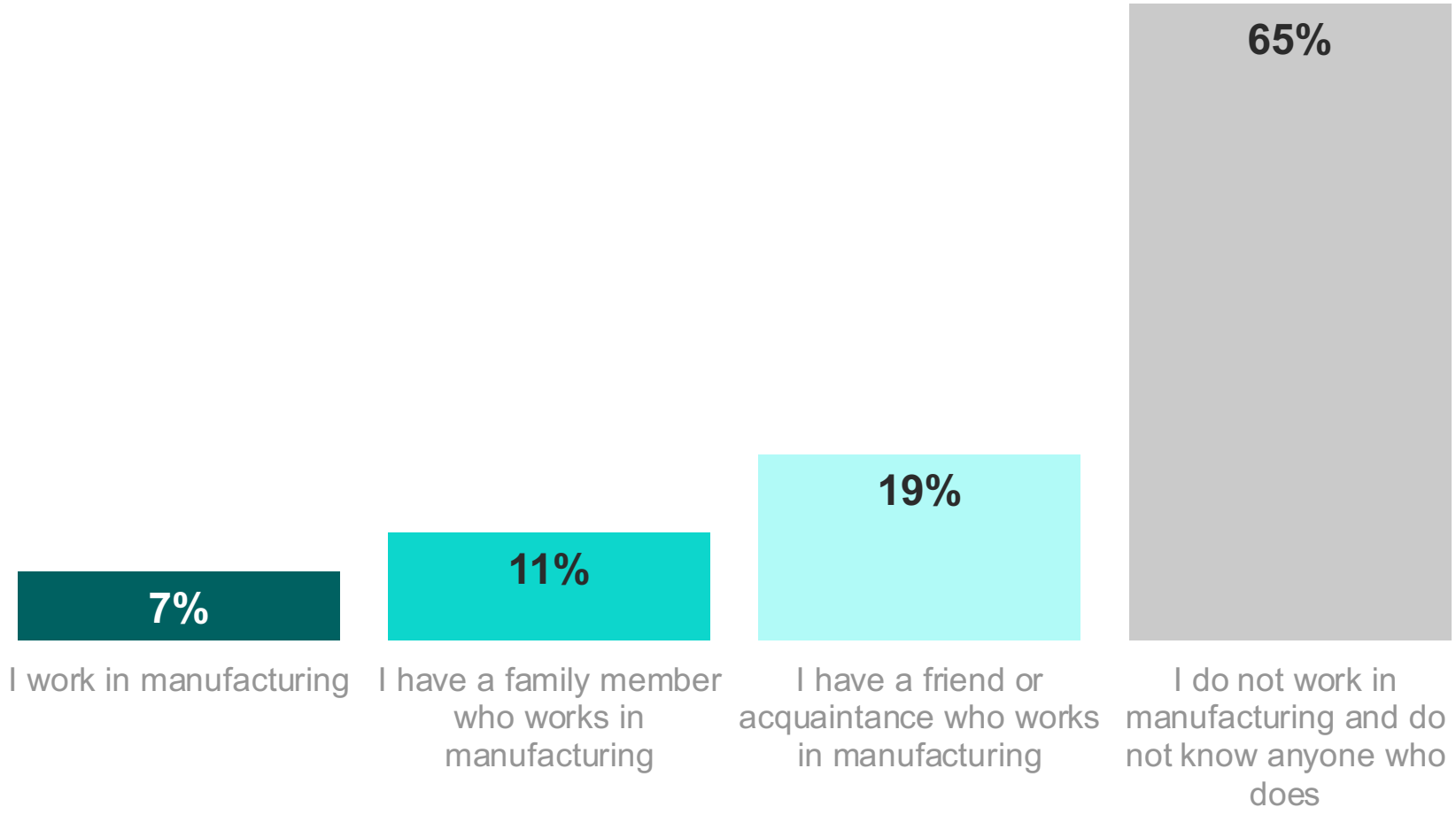
The State of Manufacturing

U.S. Registered Voters

Nationally, 7% of survey respondents report personally working in manufacturing.

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

U.S. Registered Voters

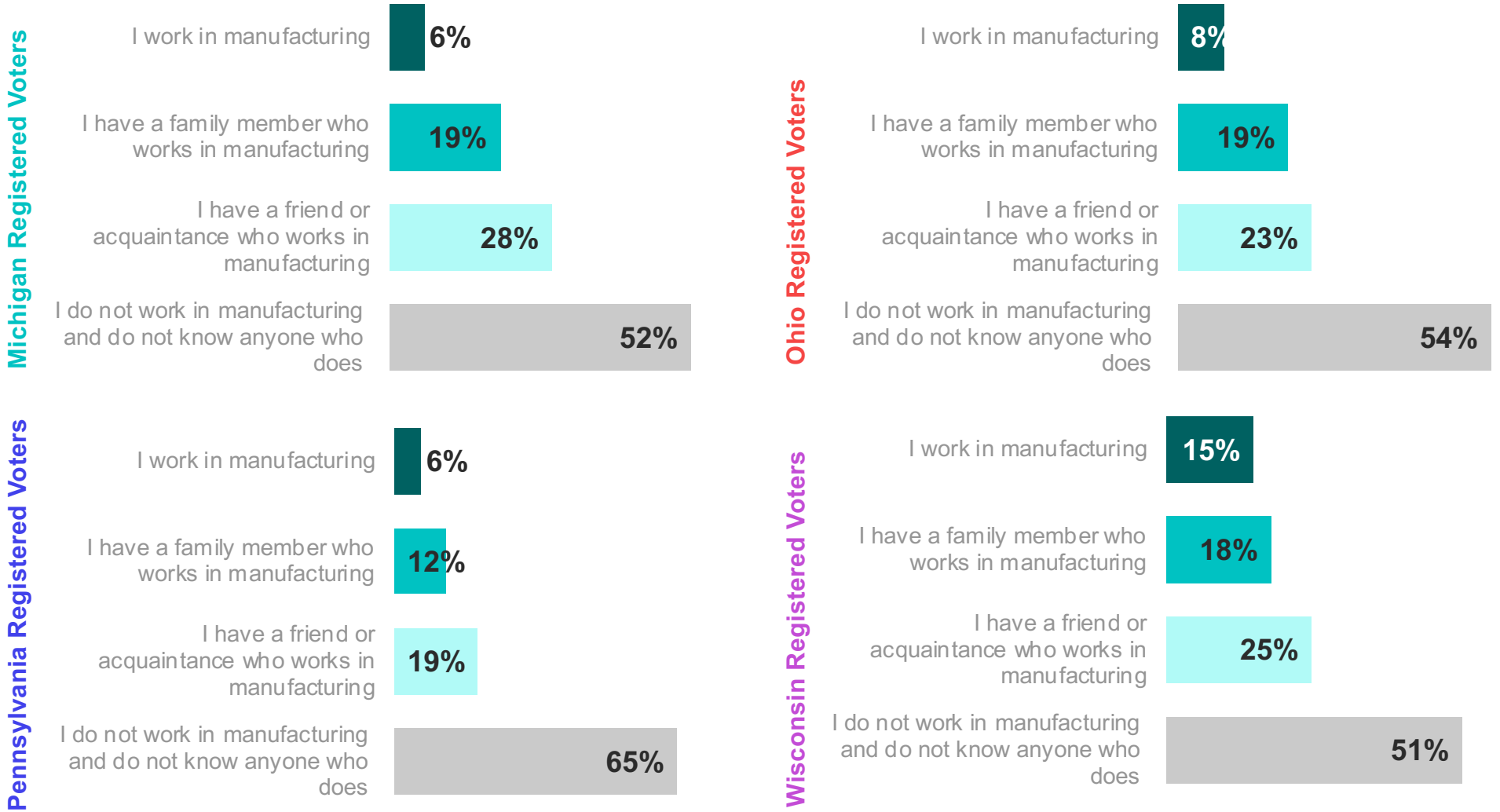


The State of Manufacturing

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 the apply.



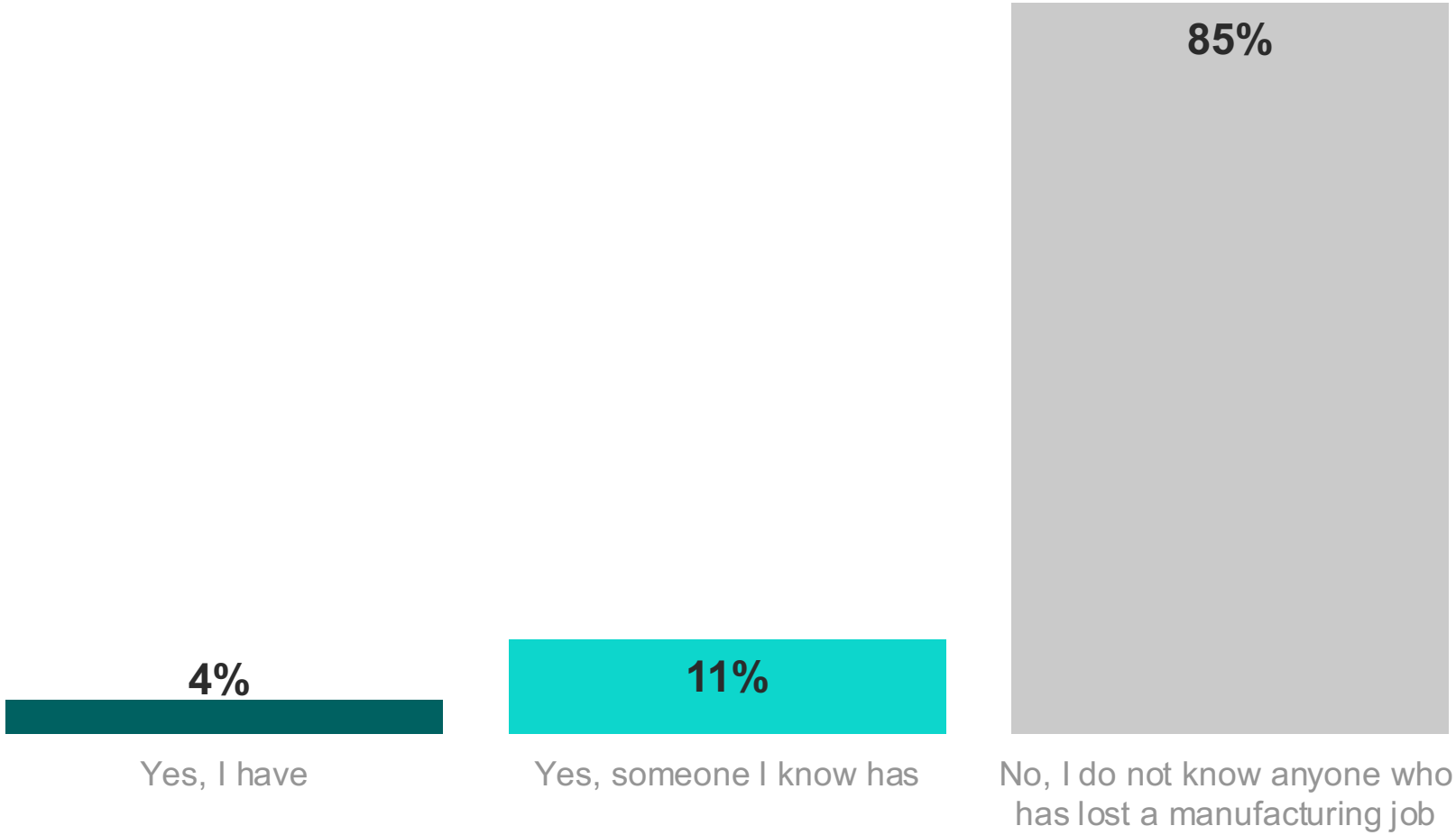
The State of Manufacturing

U.S. Registered Voters

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

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

U.S. Registered Voters

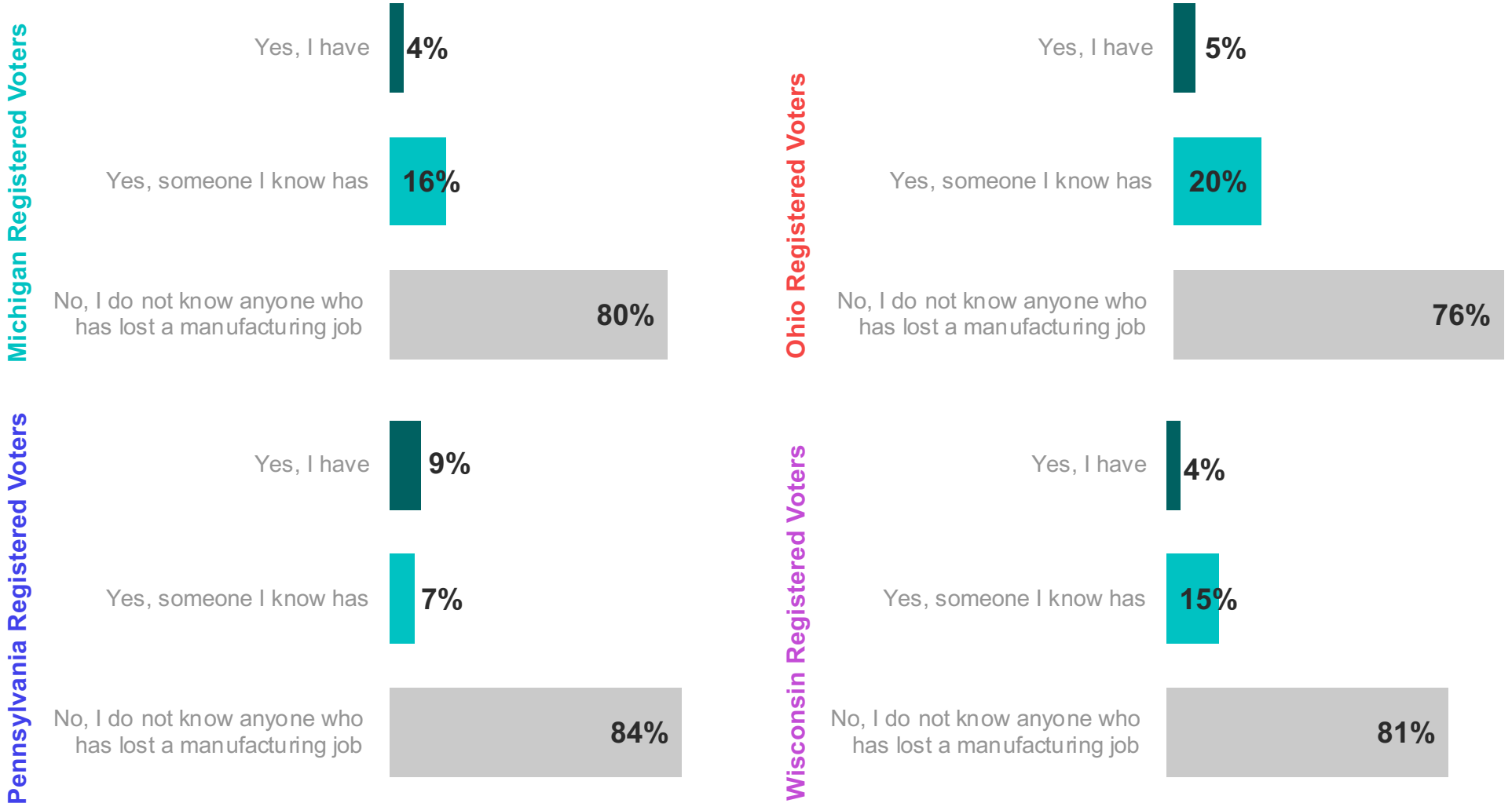


The State of Manufacturing

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.



Contents

1 Top Issues in 2020

2 The State of Manufacturing

3 The Politics and Policies of Manufacturing

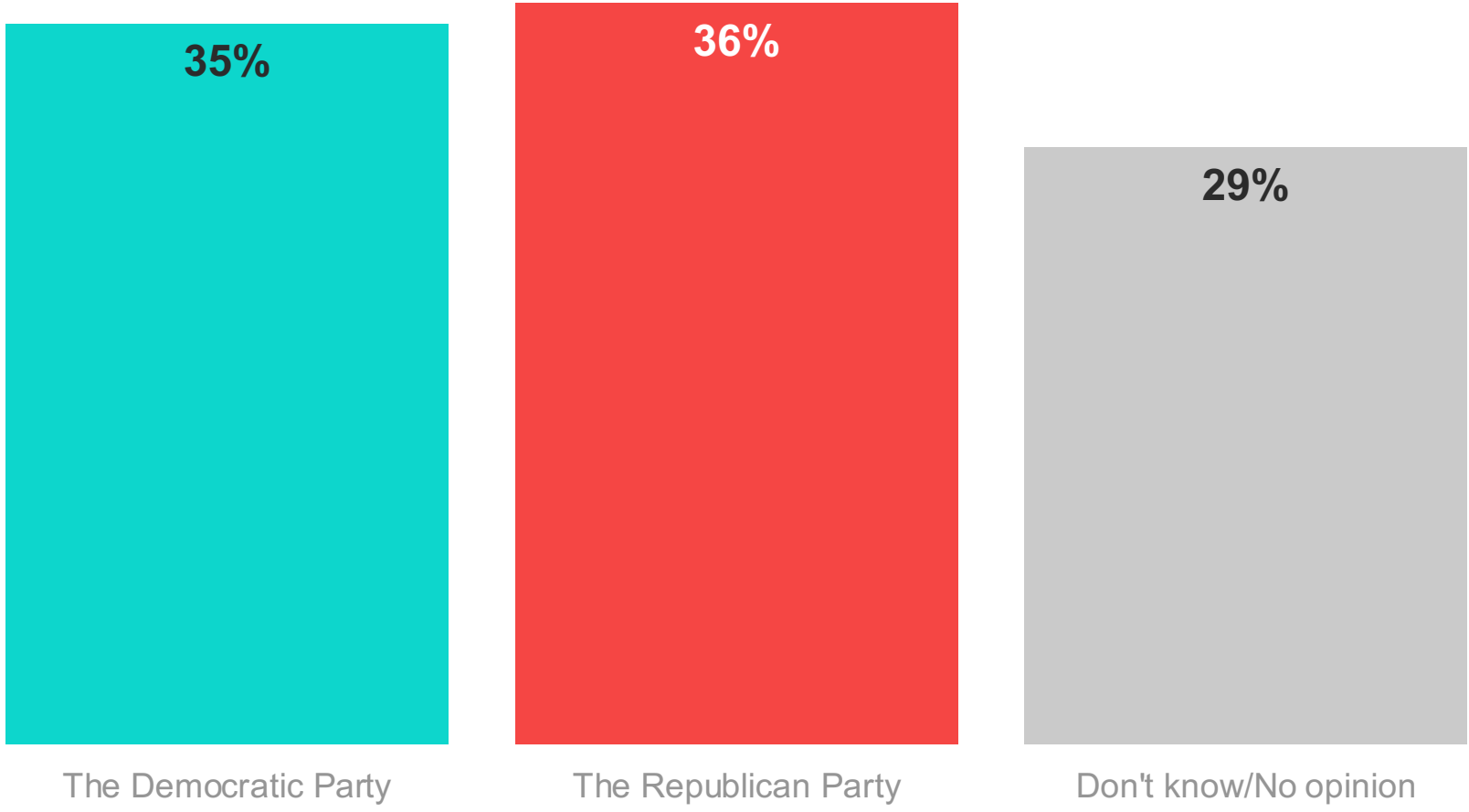
The Politics + Policies of Manufacturing

U.S. Registered Voters

Adults are split on who has been a better champion for manufacturing, historically.

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

U.S. Registered Voters



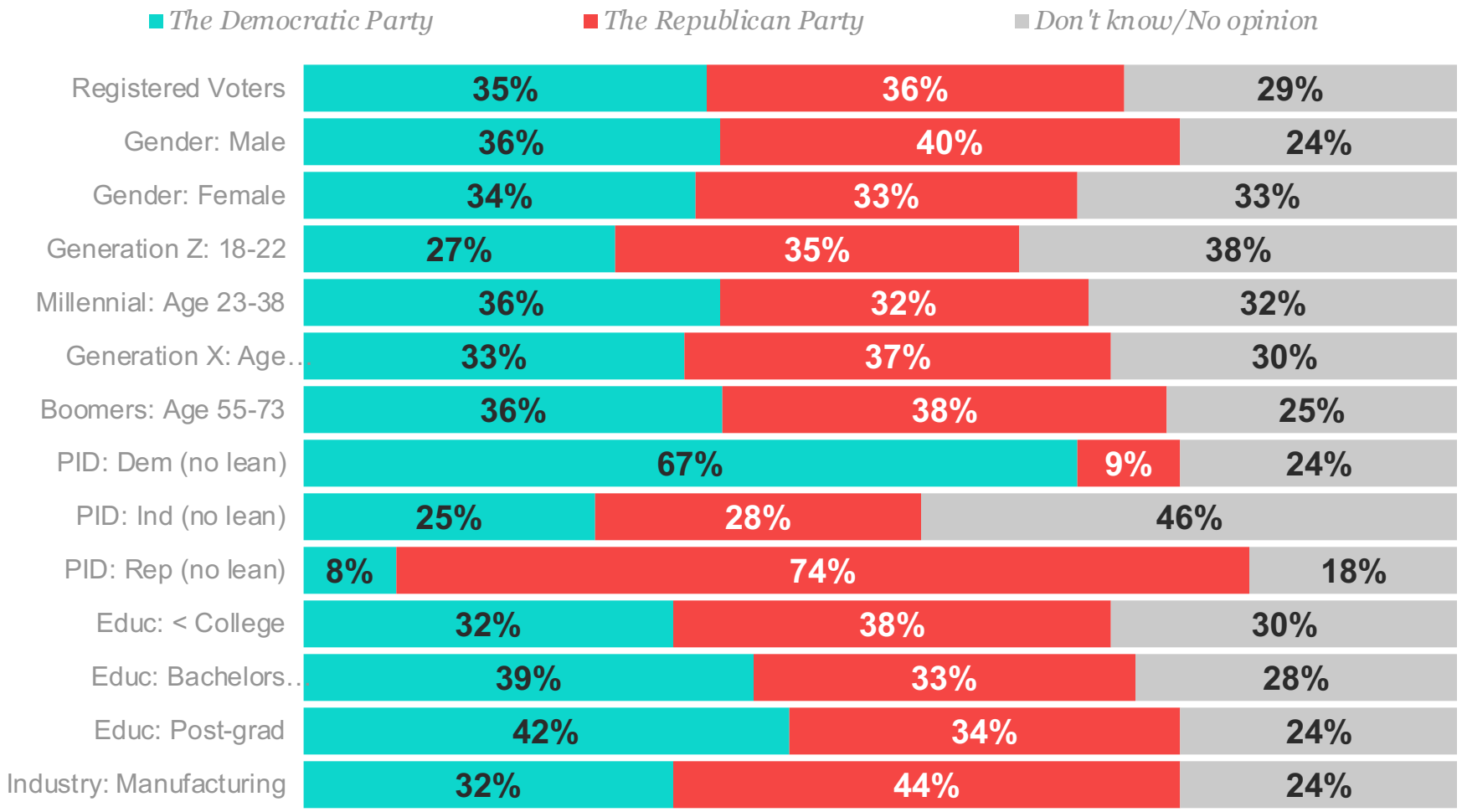
The Politics + Policies of Manufacturing

U.S. Registered Voters

Unsurprisingly, this splits Democrats and Republicans, with 2 in 3 Democrats believing their party has historically been a better champion for manufacturing, while 3 in 4 Republicans believing the same for their party.

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

U.S. Registered Voters



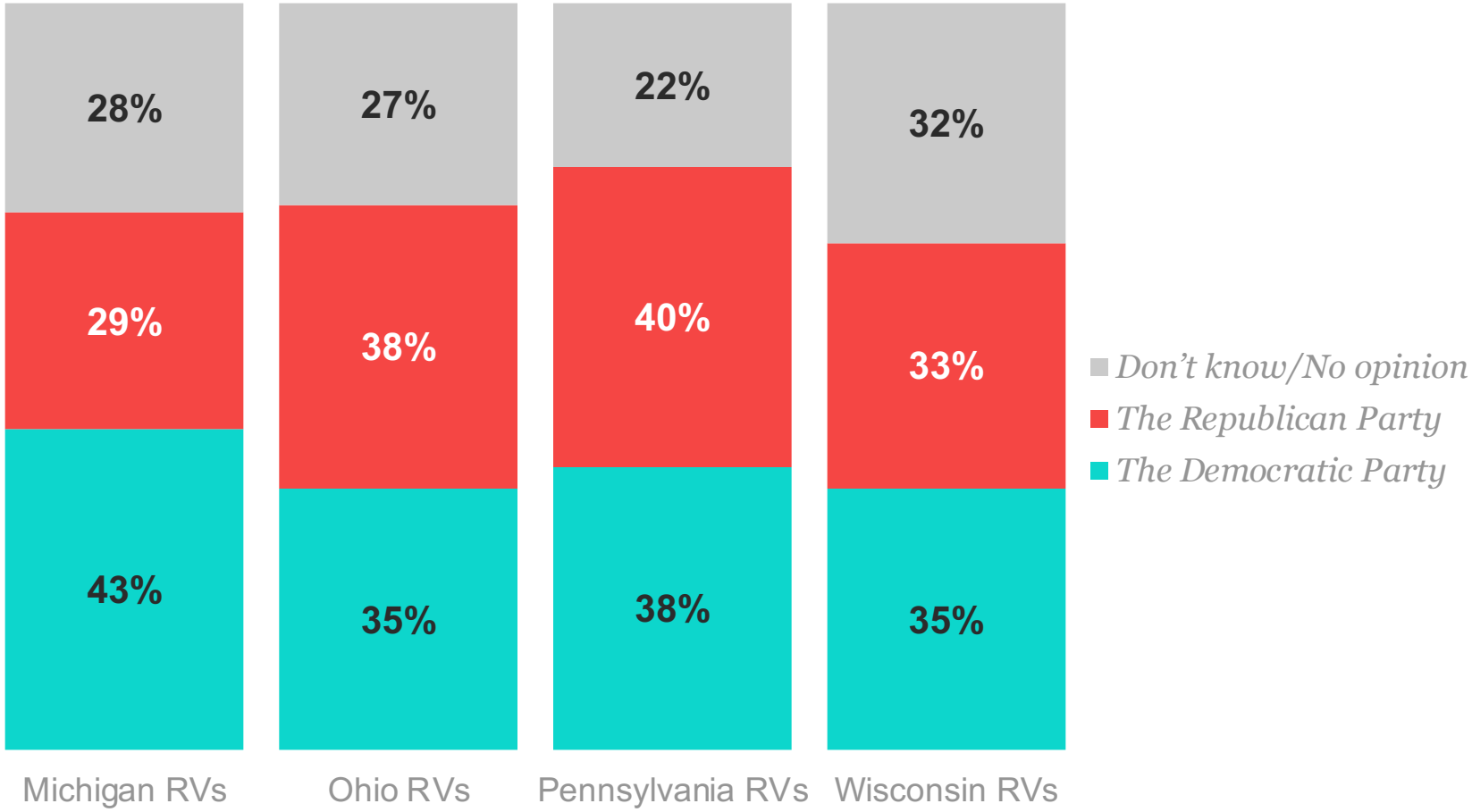
The Politics + Policies of Manufacturing

State-Specific Registered Voters

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

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

State-Specific Registered Voters



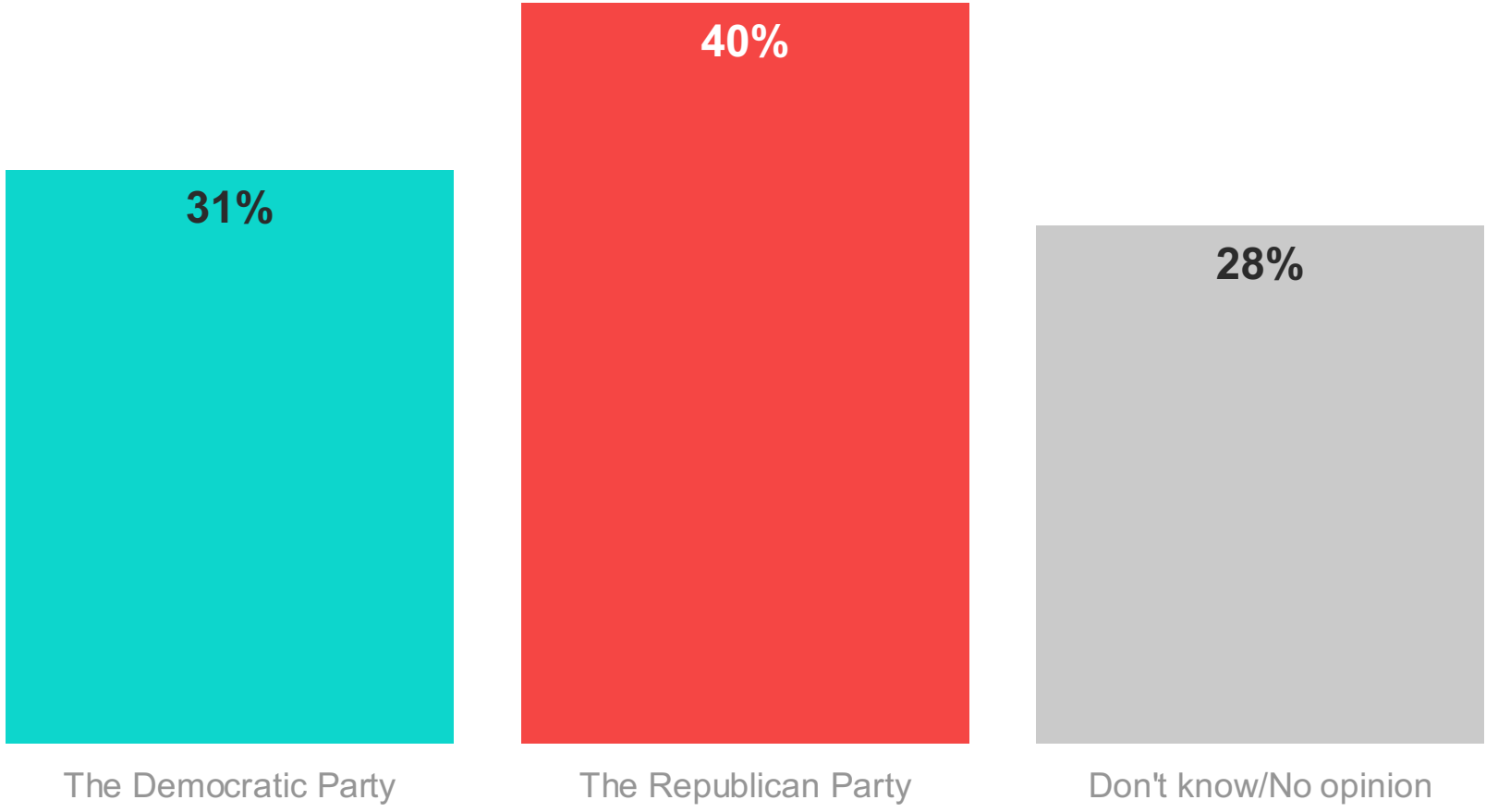
The Politics + Policies of Manufacturing

U.S. Registered Voters

Right now, the Republicans edge out Democrats as being the champion of manufacturing, but neither party has won over voters on this issue, with neither party receiving majority selection.

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

U.S. Registered Voters



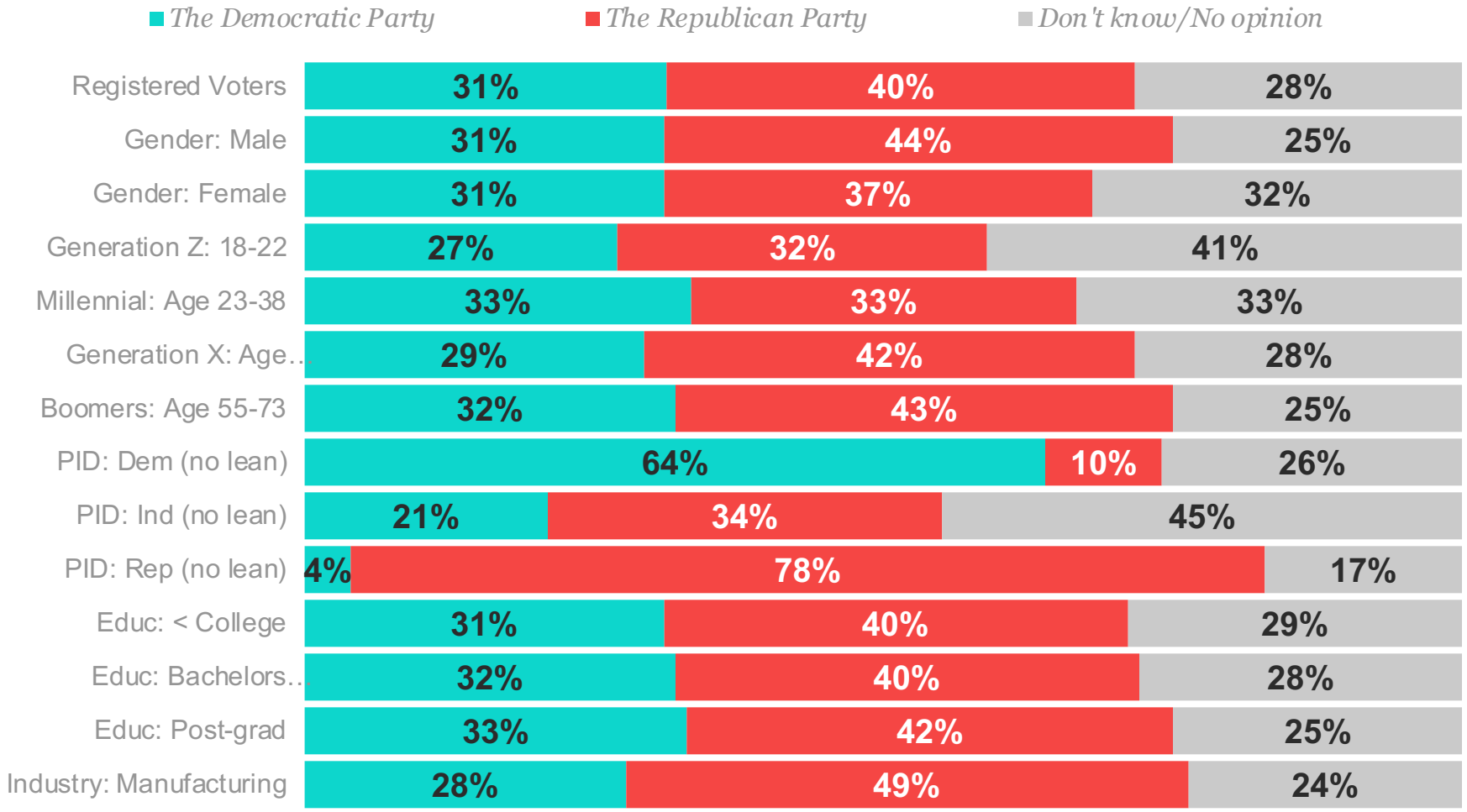
The Politics + Policies of Manufacturing

U.S. Registered Voters

Again, there is clear partisanship, with voters from both parties disproportionately selecting their party as a champion for manufacturing.

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

U.S. Registered Voters



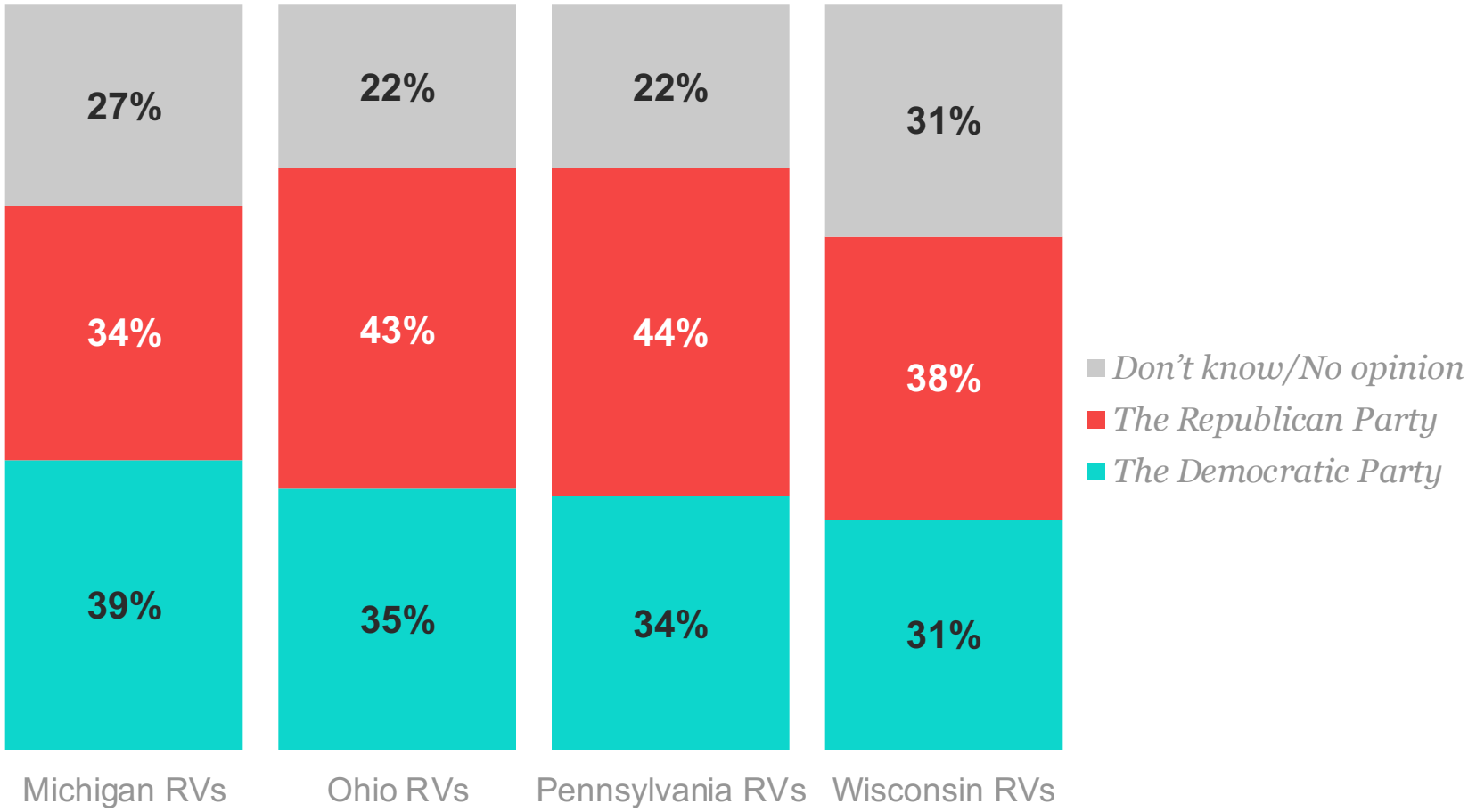
The Politics + Policies of Manufacturing

State-Specific Registered Voters

Similar to the historical vote, Michigan voters are more likely to believe the Democratic Party is currently a better champion for manufacturing. However voters in Ohio, Pennsylvania and Wisconsin are divided on which party they think is the champion.

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

State-Specific Registered Voters



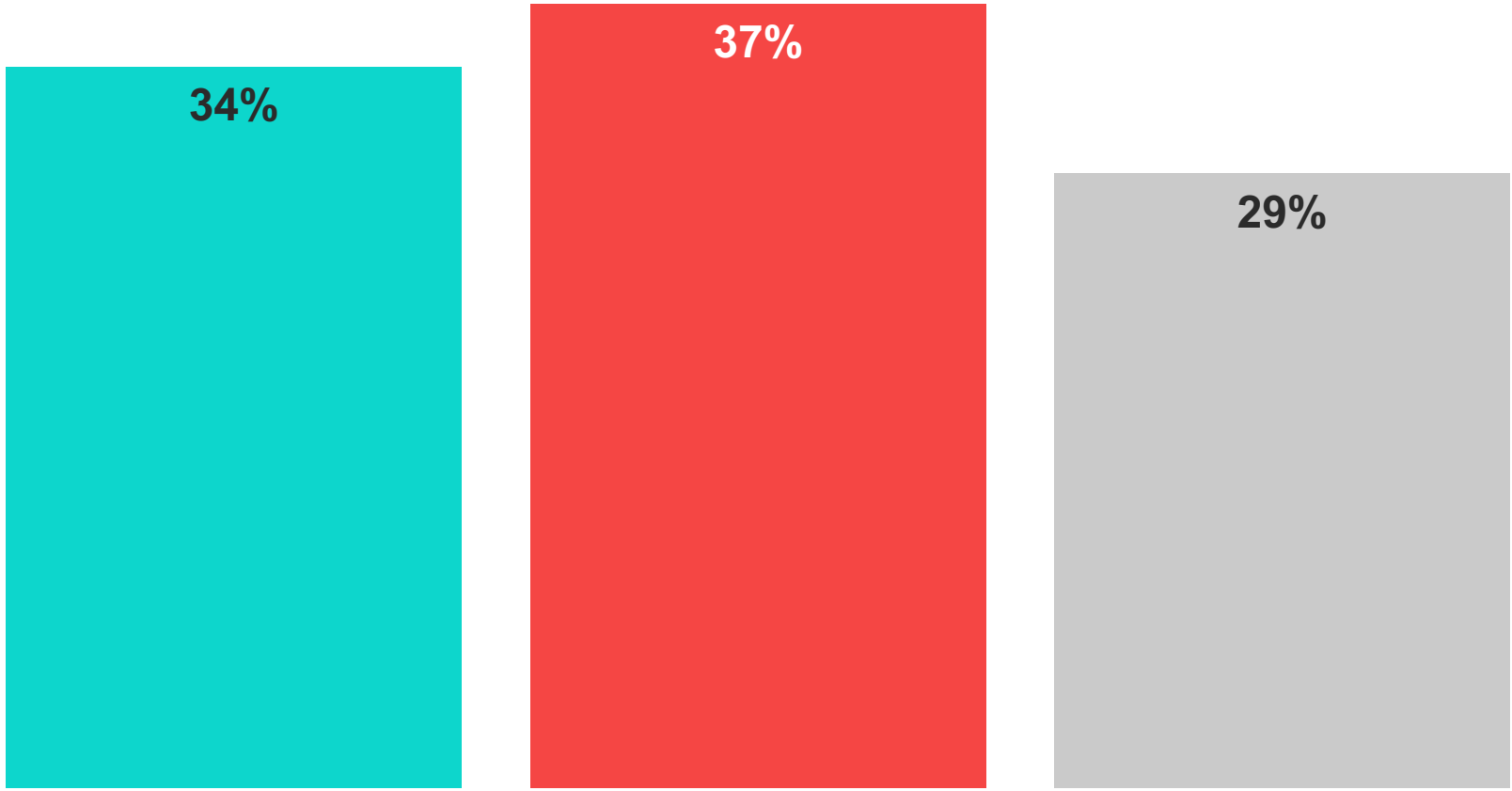
The Politics + Policies of Manufacturing

U.S. Registered Voters

And, as for which party will be a better champion for manufacturing in the future, the jury is still out for voters.

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

U.S. Registered Voters



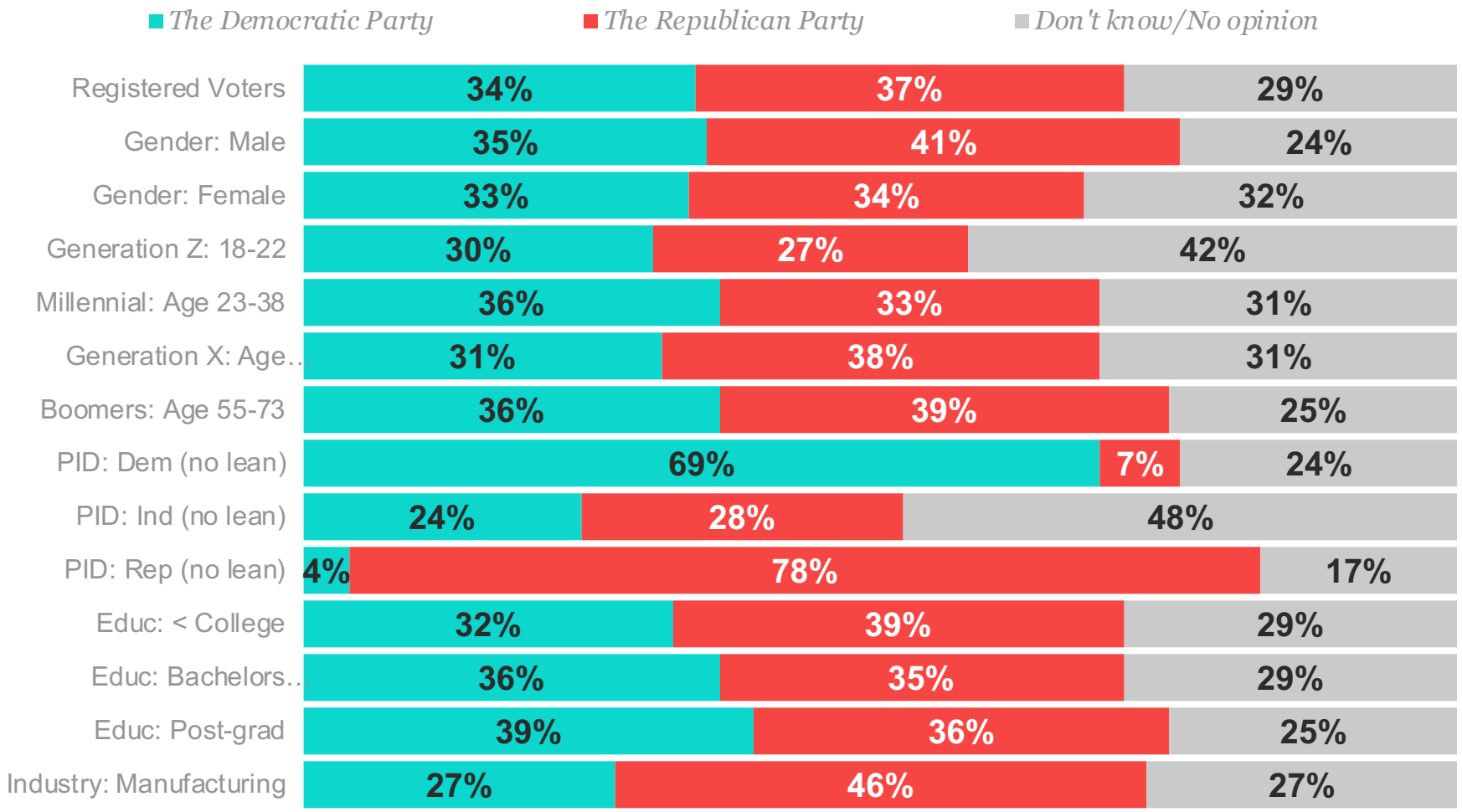
The Politics + Policies of Manufacturing

U.S. Registered Voters

Close to half of independents (48%) are not even willing to make a best guess as to what party will be a better champion for manufacturing in the future.

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

U.S. Registered Voters



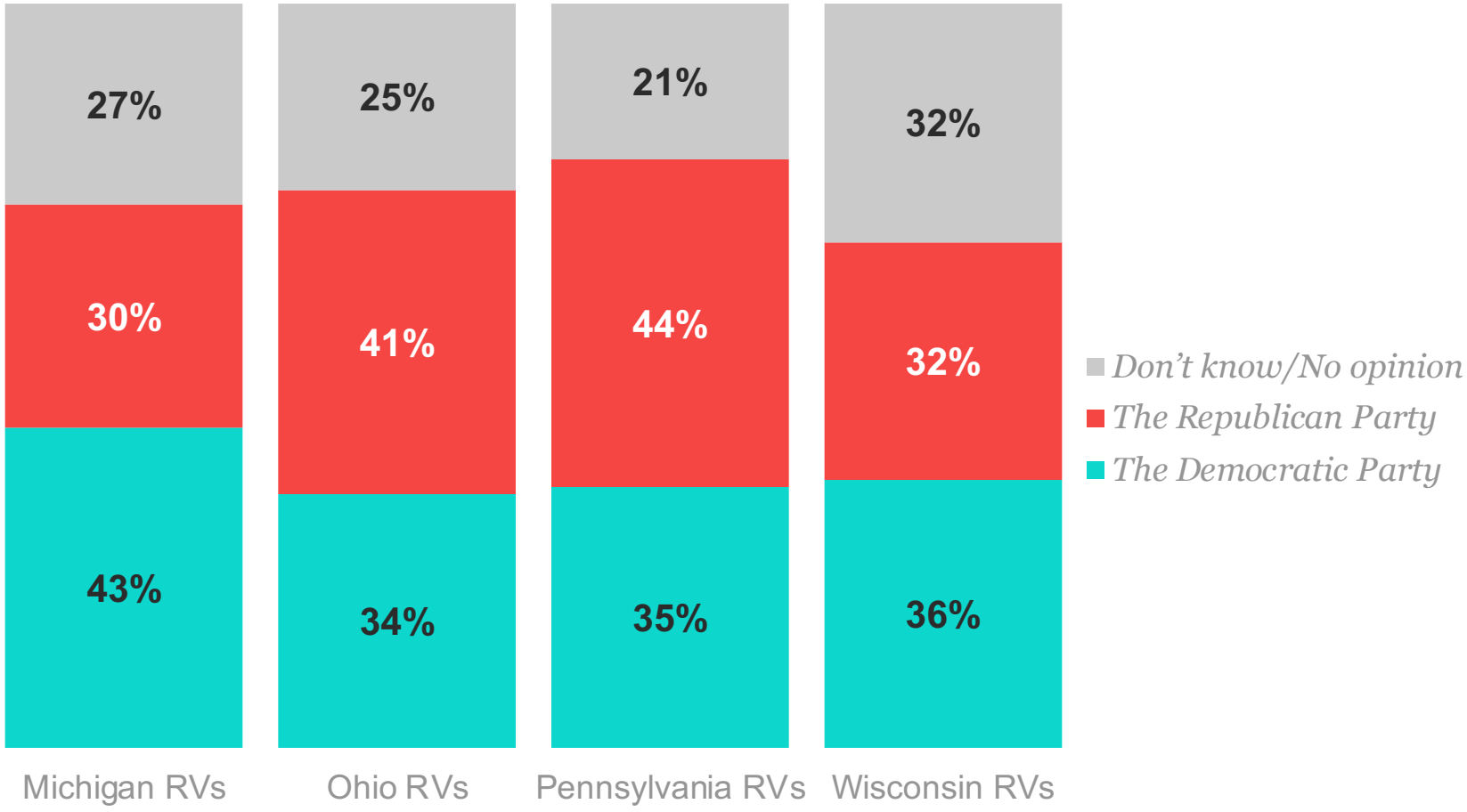
The Politics + Policies of Manufacturing

State-Specific Registered Voters

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

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

State-Specific Registered Voters



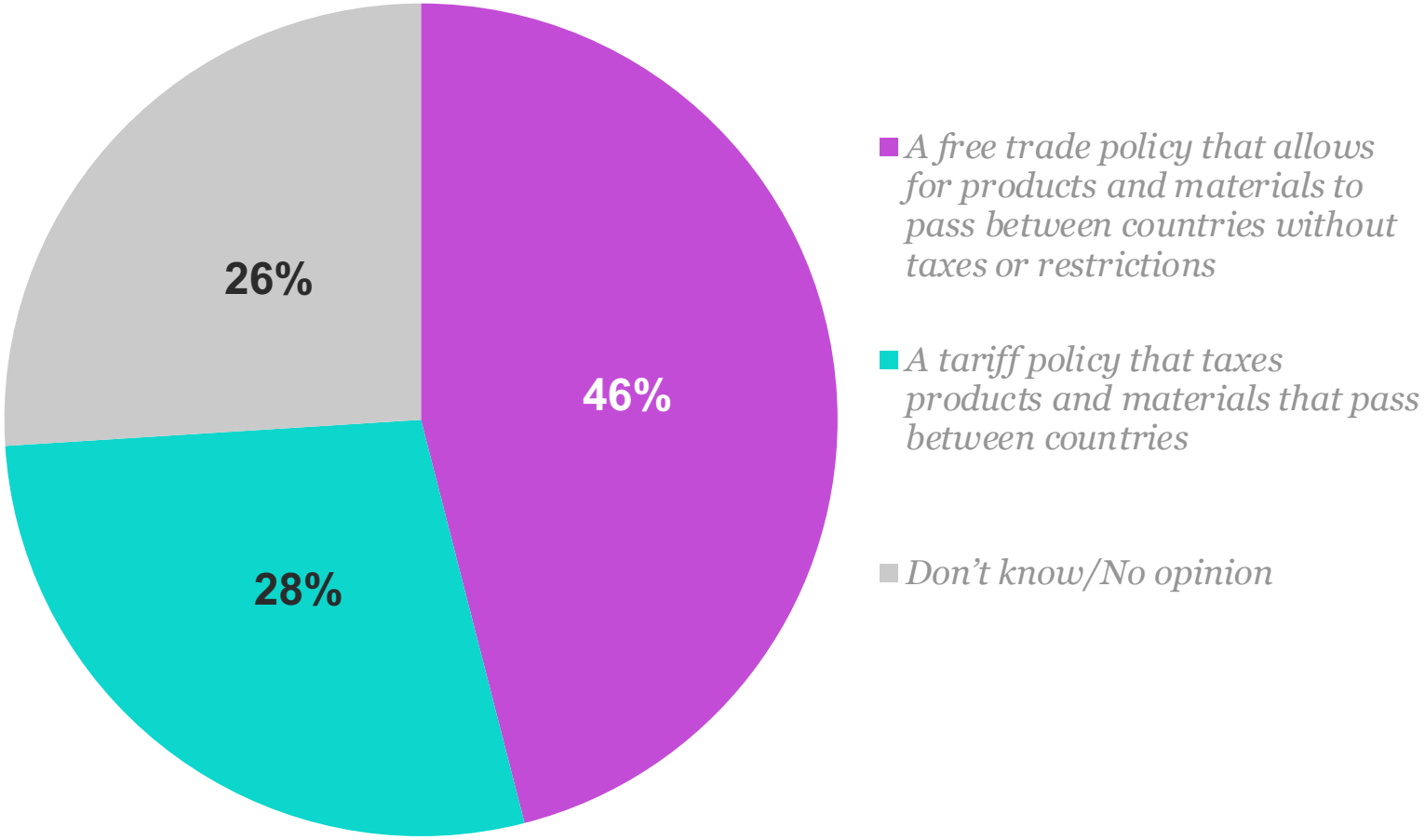
The Politics + Policies of Manufacturing

U.S. Registered Voters

Thinking about trade, specifically, a plurality of voters (46%) believe a free trade policy is better for the manufacturing sector in the U.S.

Which of the following trade policies do you think is better for the manufacturing sector in the U.S.?

U.S. Registered Voters



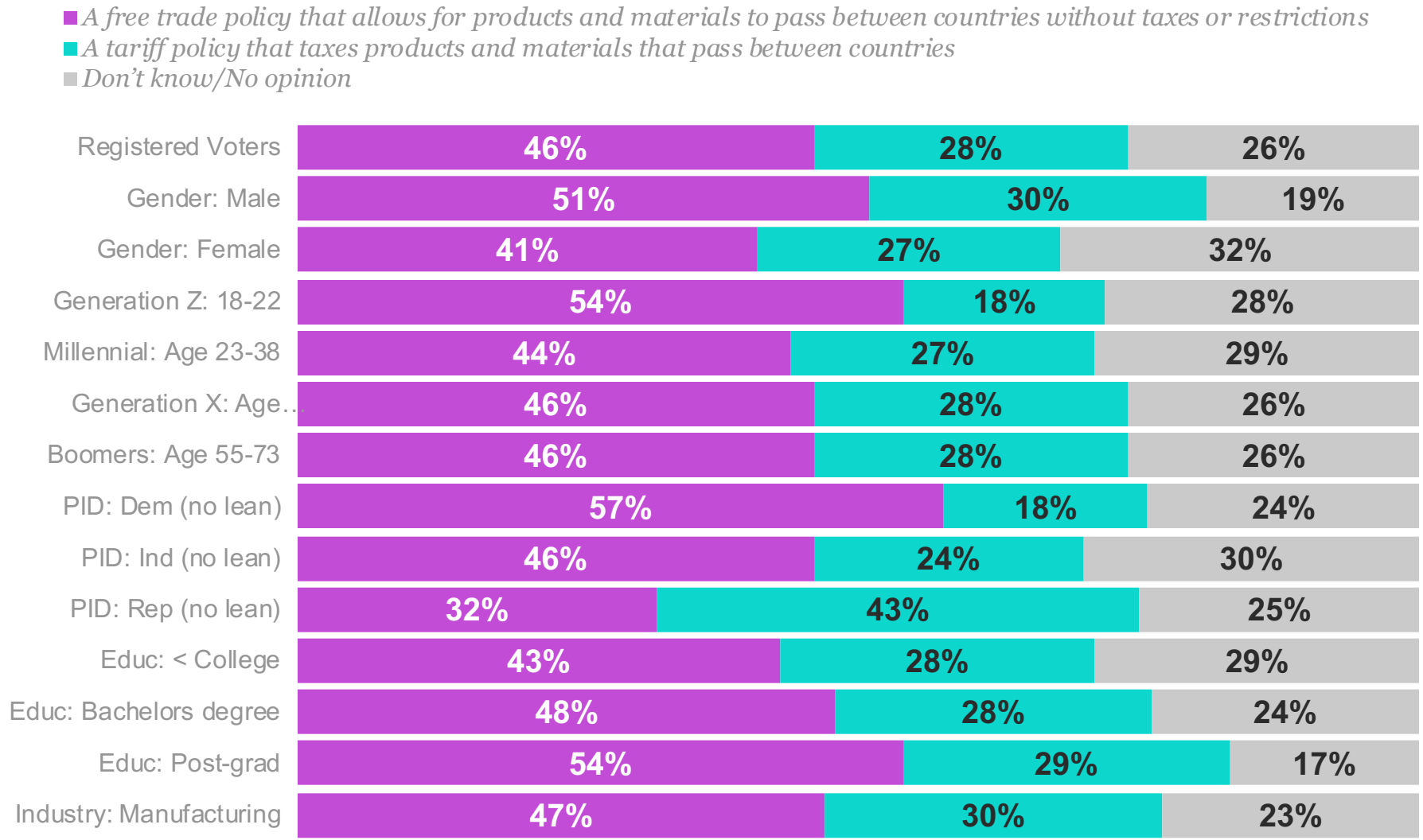
The Politics + Policies of Manufacturing

U.S. Registered Voters

A majority of Democrats (57%) believe a free trade policy is better for the manufacturing sector, while a plurality of Republicans (43%) believe a tariff policy is better for manufacturing.

Which of the following trade policies do you think is better for the manufacturing sector in the U.S.?

U.S. Registered Voters



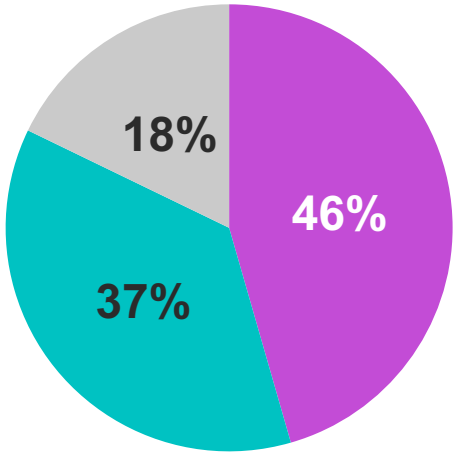
The Politics + Policies of Manufacturing

State-Specific Registered Voters

Adults in these select states are more likely to believe a free trade policy would be better for manufacturing than a tariff policy, though a free trade policy falls short of receiving majority selection in any of these states.

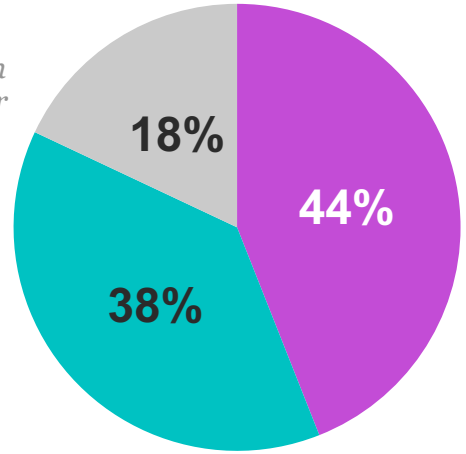
Which of the following trade policies do you think is better for the manufacturing sector in the U.S.?

Michigan Registered Voters



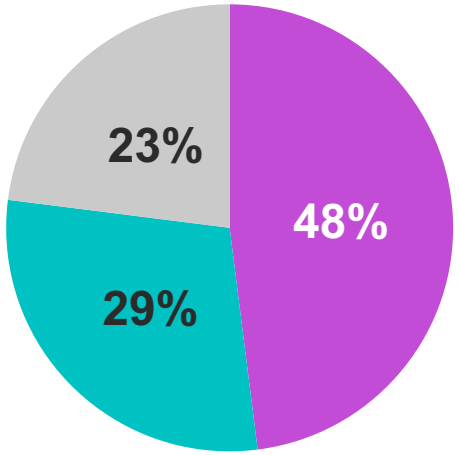
- *A free trade policy that allows for products and materials to pass between countries without taxes or restrictions*
- *A tariff policy that taxes products and materials that pass between countries*
- *Don't know/No opinion*

Ohio Registered Voters



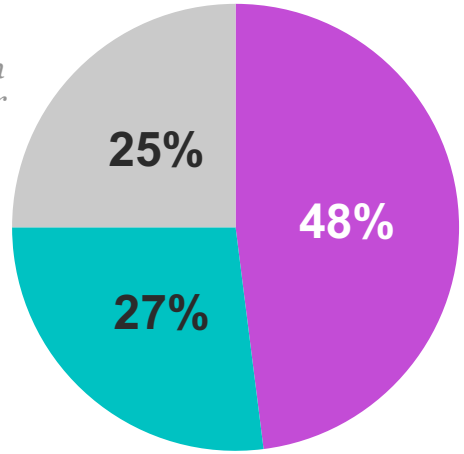
- *A free trade policy that allows for products and materials to pass between countries without taxes or restrictions*
- *A tariff policy that taxes products and materials that pass between countries*
- *Don't know/No opinion*

Pennsylvania Registered Voters



- *A free trade policy that allows for products and materials to pass between countries without taxes or restrictions*
- *A tariff policy that taxes products and materials that pass between countries*
- *Don't know/No opinion*

Wisconsin Registered Voters



- *A free trade policy that allows for products and materials to pass between countries without taxes or restrictions*
- *A tariff policy that taxes products and materials that pass between countries*
- *Don't know/No opinion*

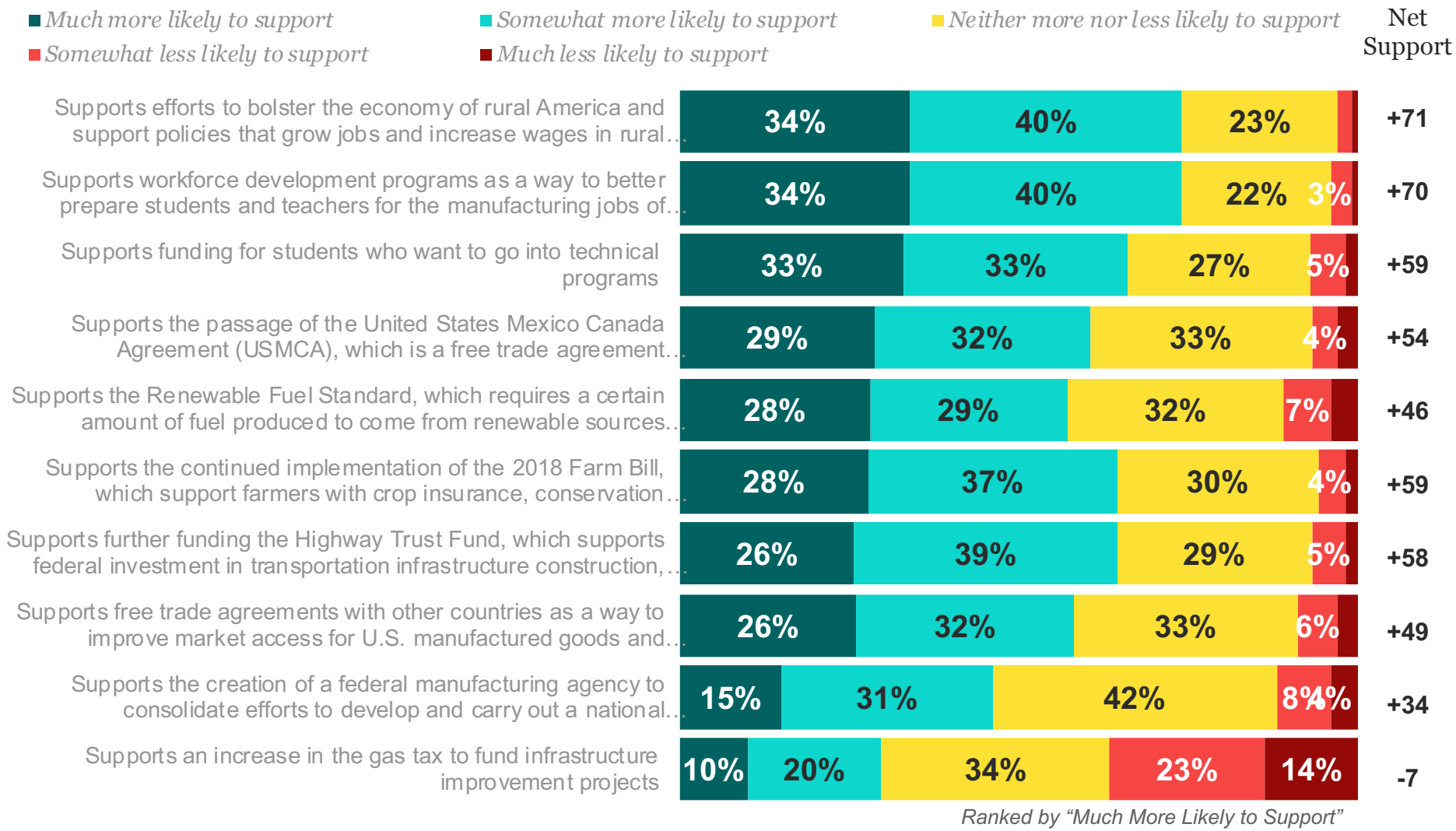
The Politics + Policies of Manufacturing

U.S. Registered Voters

Stances related to jobs perform best: “support policies that grow jobs,” “support workforce development,” and “funding for students who want to go into technical programs.”

Below are a variety of stance 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



Ranked by “Much More Likely to Support”

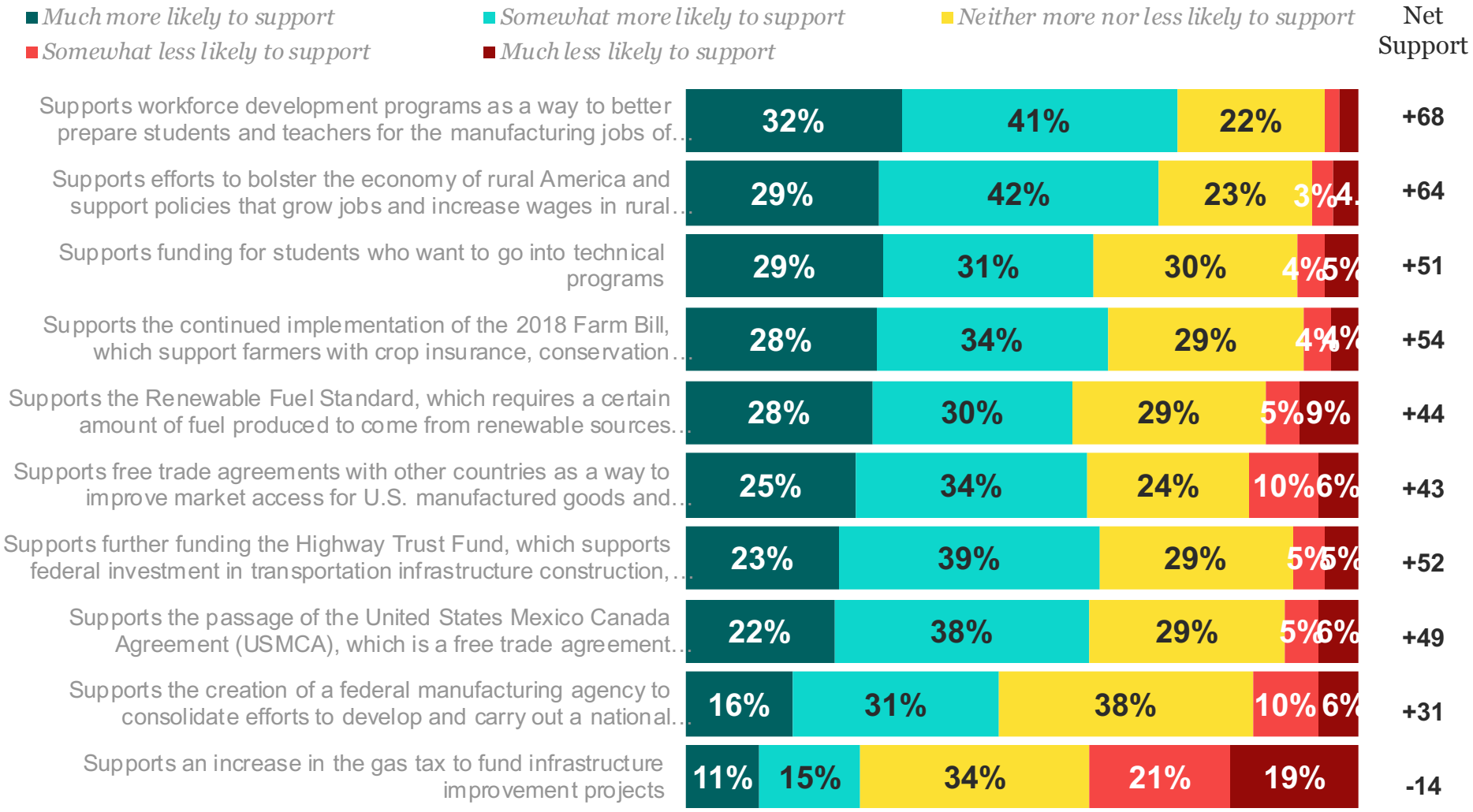
The Politics + Policies of Manufacturing

Michigan Registered Voters

"Bolster the economy," "workforce development," and the "continued implementation of the 2018 farm bill" perform well with Michigan voters.

Below are a variety of stance 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



Ranked by "Much More Likely to Support"

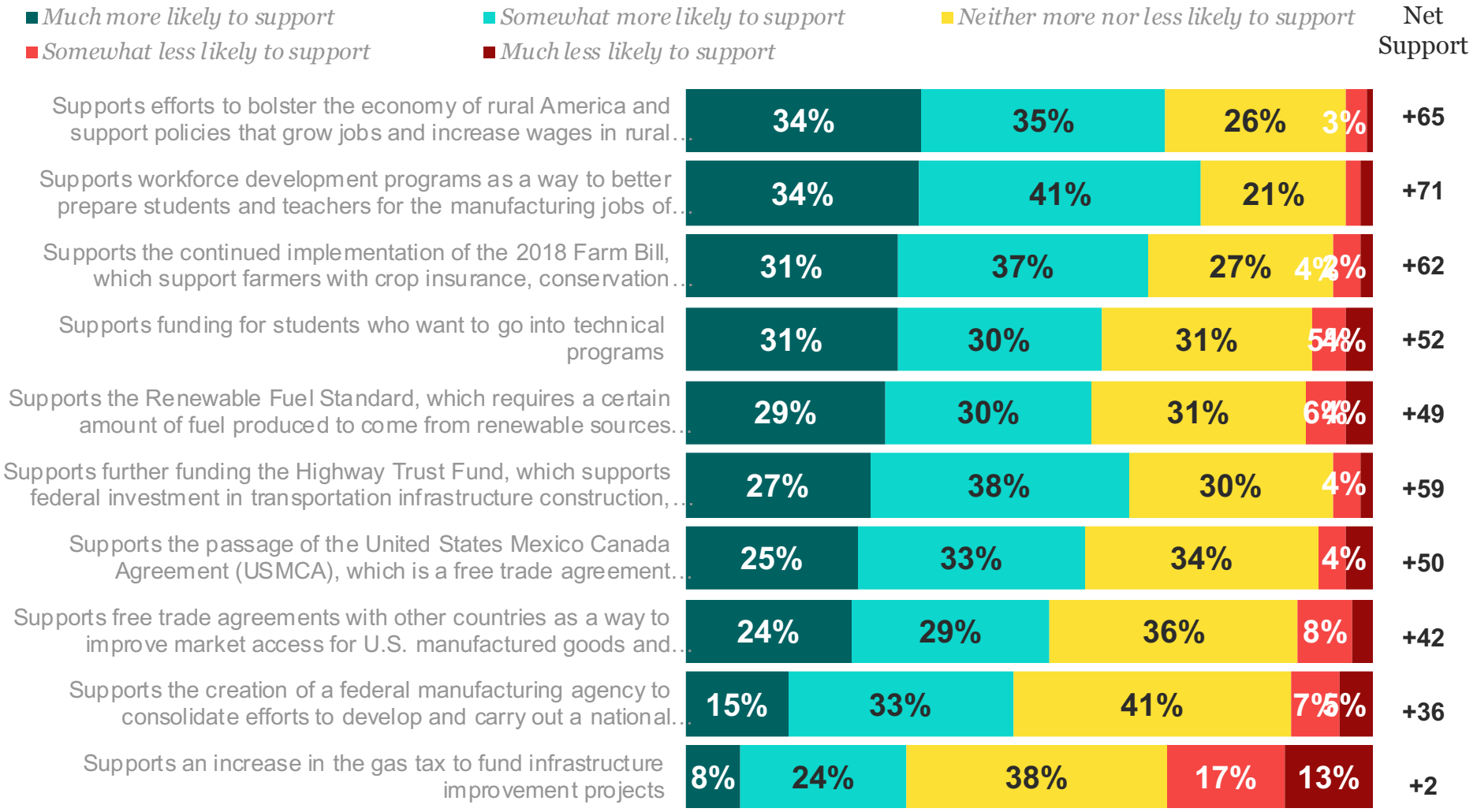
The Politics + Policies of Manufacturing

Ohio Registered Voters

Stances discussing the "economy," "workforce development program," the "2018 Farm Bill," and the "Highway Trust Fund" perform well in Ohio.

Below are a variety of stance 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"

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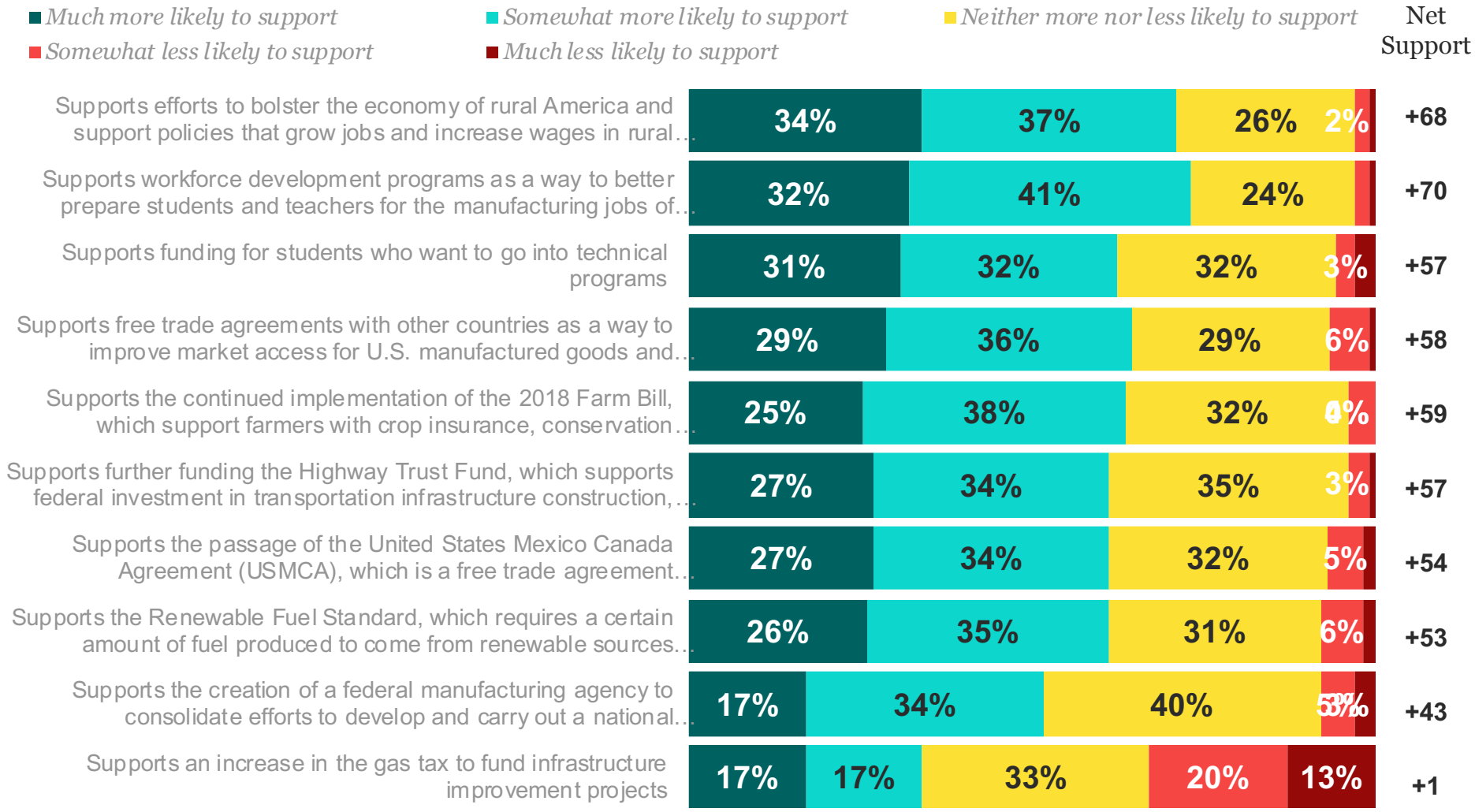
The Politics + Policies of Manufacturing

Pennsylvania Registered Voters

In Pennsylvania, the "workforce development" stance received the strongest net support, along with "bolstering the economy of rural America."

Below are a variety of stance 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



Ranked by "Much More Likely to Support"

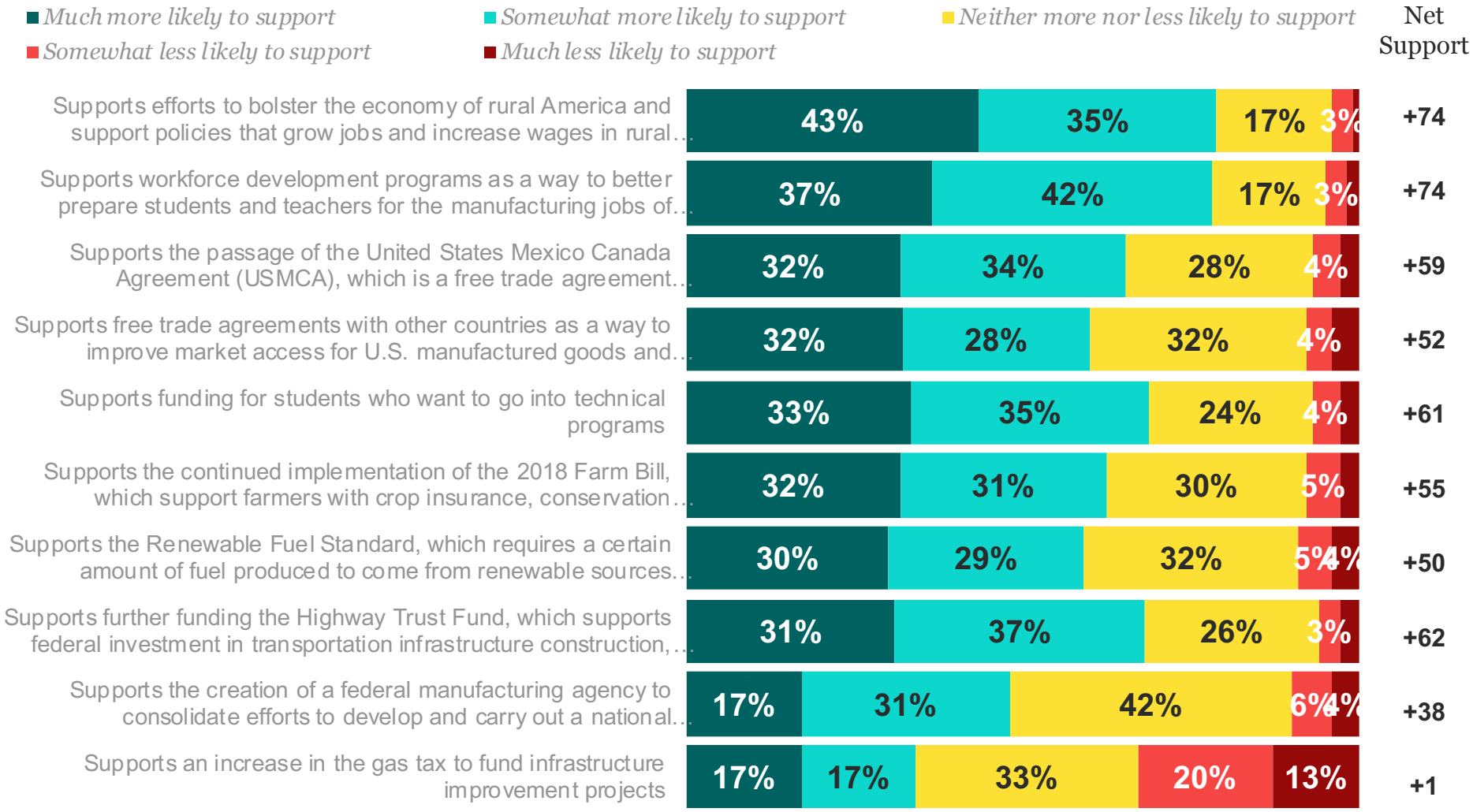
The Politics + Policies of Manufacturing

Wisconsin Registered Voters

"Bolstering the economy of rural America," and "workforce development" performed the strongest among Wisconsin voters.

Below are a variety of stance 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



Ranked by "Much More Likely to Support"

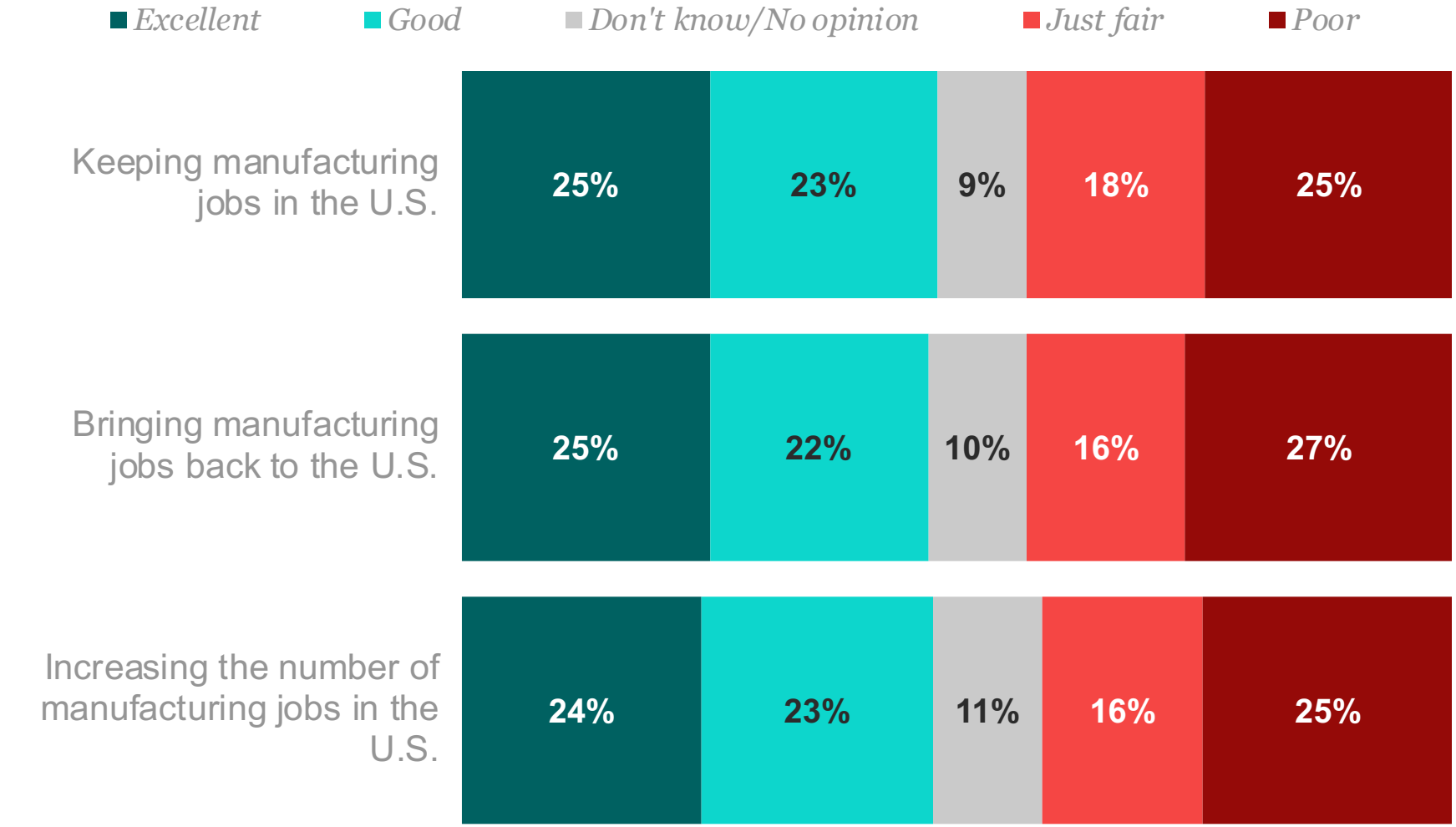
The Politics + Policies of Manufacturing

U.S. Registered Voters

Voters are split on President Trump's job performance on keeping, bringing, or increasing manufacturing jobs in the U.S.

How would you rate the job President Trump has done on each of the following areas since taking office?

U.S. Registered Voters



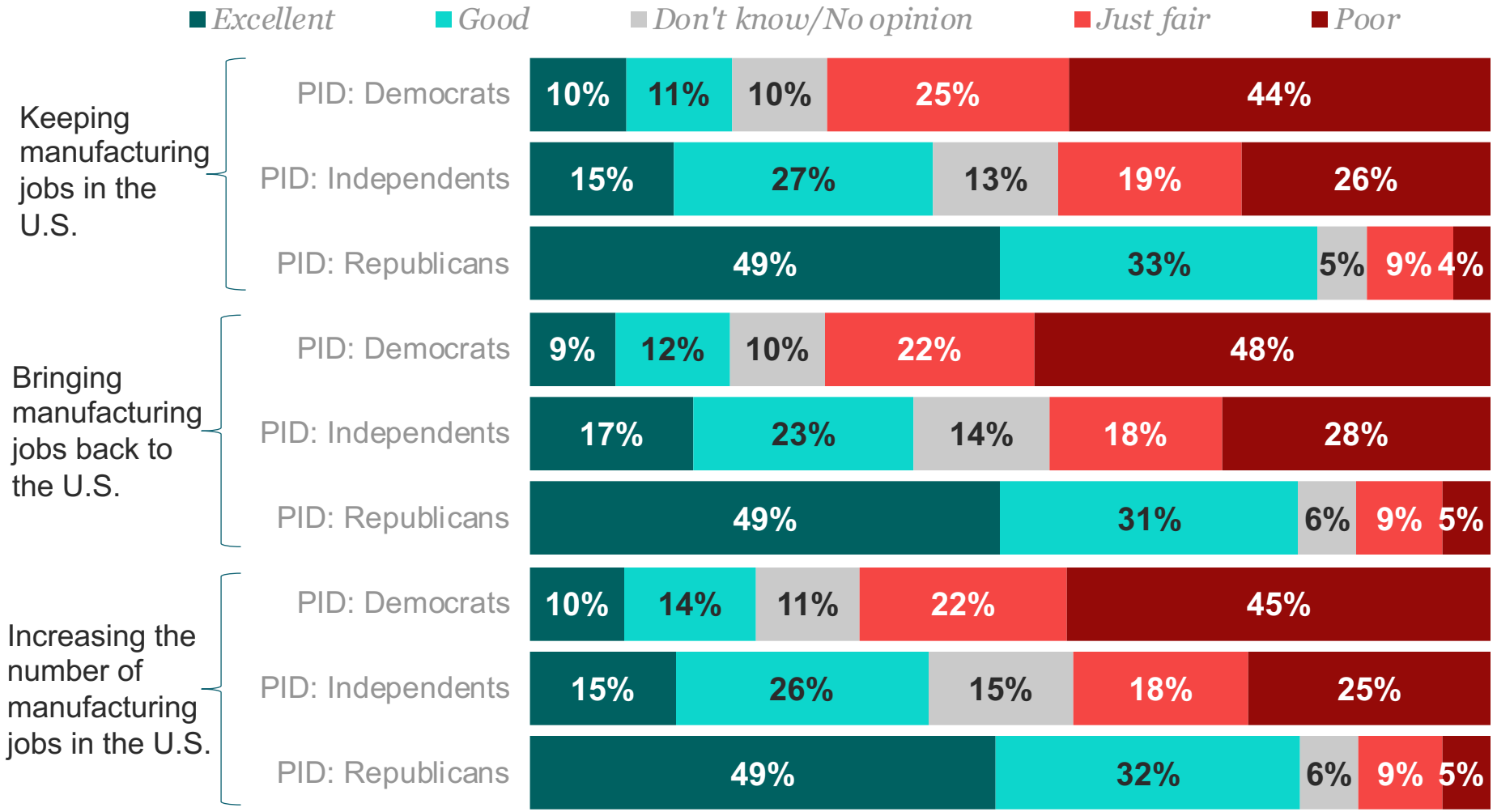
The Politics + Policies of Manufacturing

U.S. Registered Voters

Though, across these areas, half (49%) of Republicans believe President Trump has done *excellent*, while just under half of Democrats rate his job performance on these issues as *poor*.

How would you rate the job President Trump has done on each of the following areas since taking office?

U.S. Registered Voters



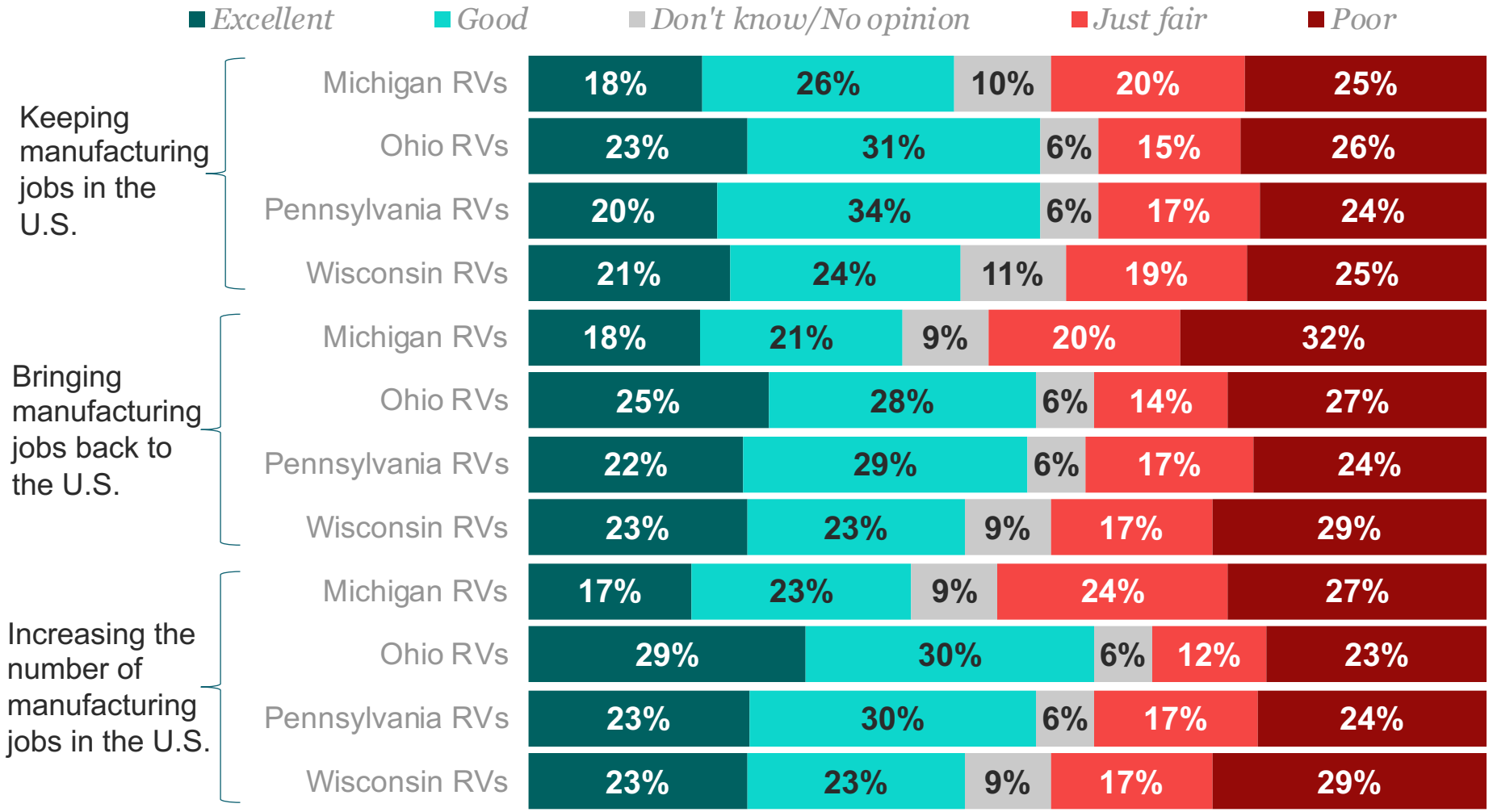
The Politics + Policies of Manufacturing

State-Specific Registered Voters

Ohio voters are the most likely to report President Trump has increased the number of manufacturing jobs in the U.S., while Michigan voters are the least likely.

How would you rate the job President Trump has done on each of the following areas since taking office?

State-Specific Registered Voters



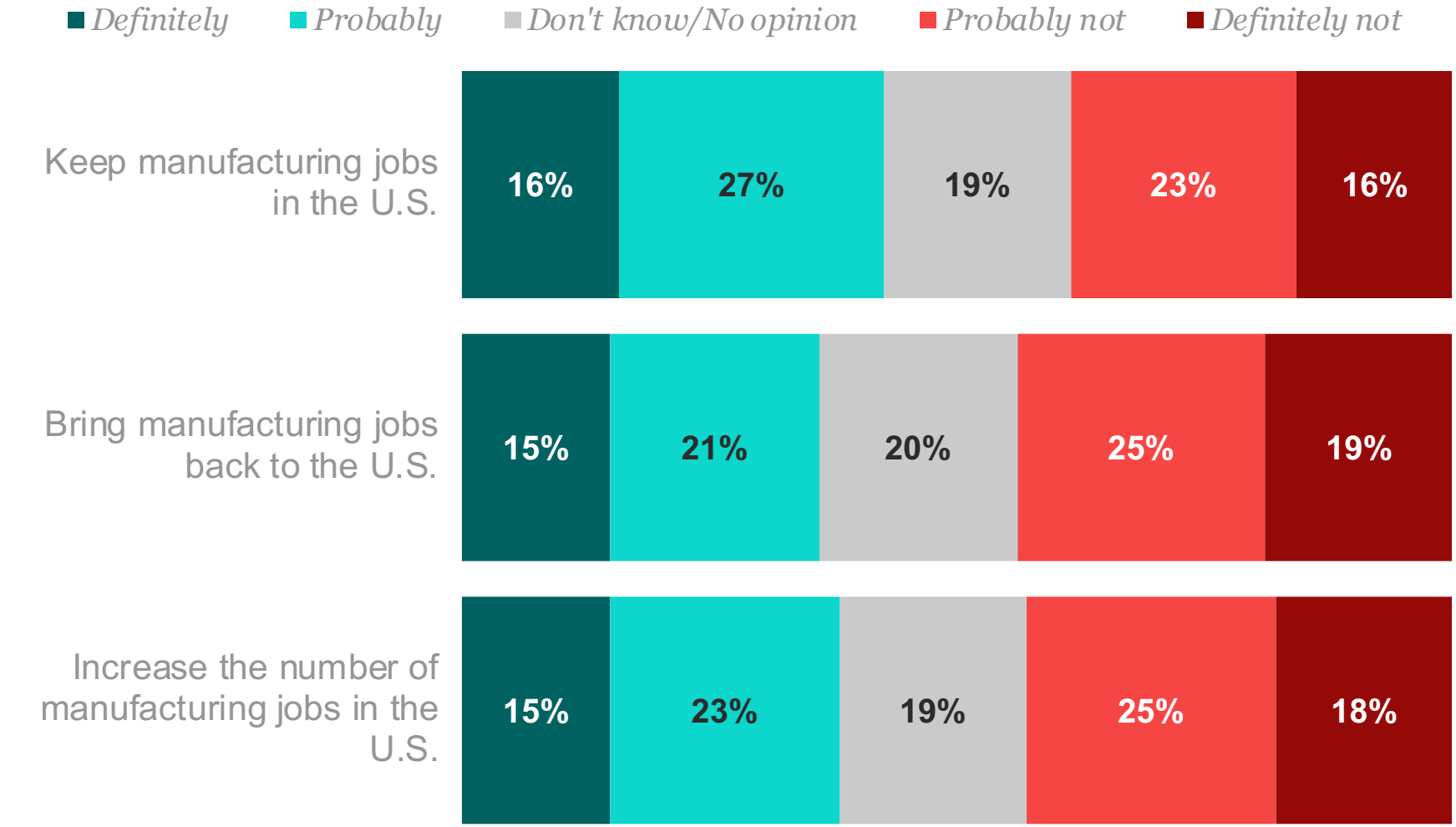
The Politics + Policies of Manufacturing

U.S. Registered Voters

Voters are also split on whether the hypothetical Democratic nominee will actually keep, bring, or increase the number of jobs in manufacturing.

Do you expect that the Democratic nominee for president in 2020 will do each of the following, if elected?

U.S. Registered Voters



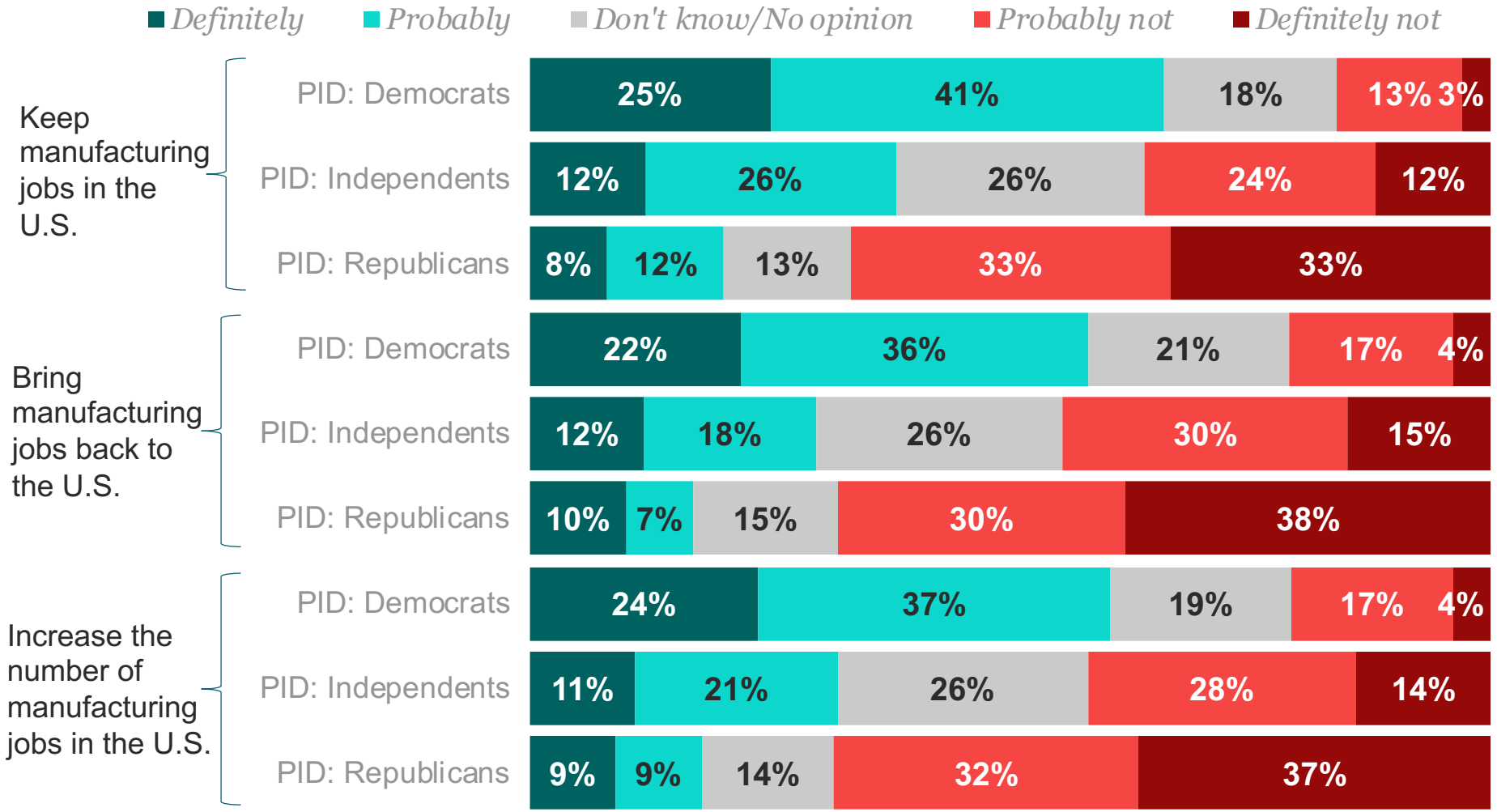
The Politics + Policies of Manufacturing

U.S. Registered Voters

Democrats are more optimistic in their hypothetical nominee, with about a quarter saying their nominee will *definitely* keep, bring, or increase manufacturing jobs in the U.S.

Do you expect that the Democratic nominee for president in 2020 will do each of the following, if elected?

U.S. Registered Voters



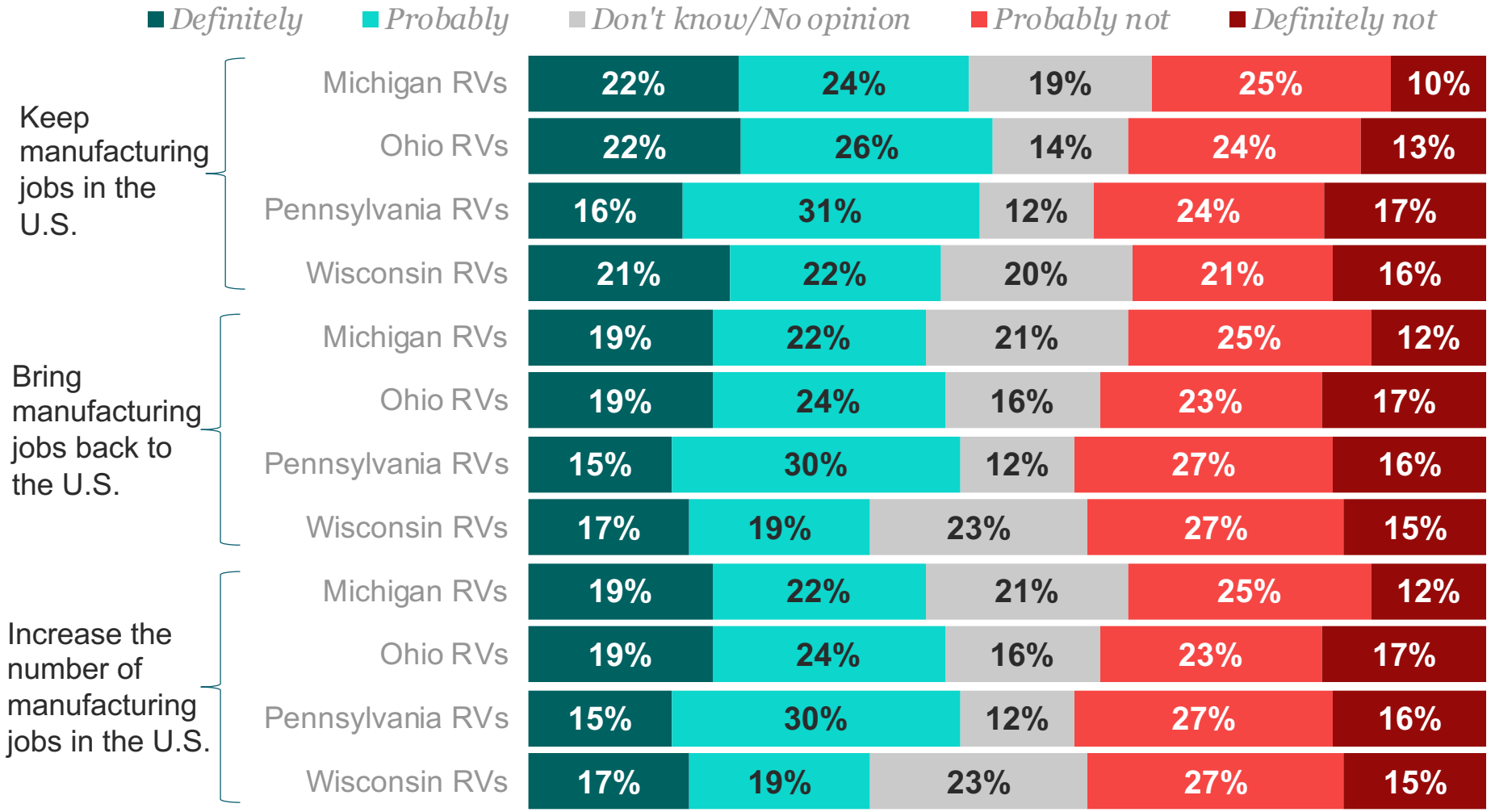
The Politics + Policies of Manufacturing

State-Specific Registered Voters

Select swing states are also split regarding what a Democratic nominee for president would be able to accomplish for the manufacturing sector.

Do you expect that the Democratic nominee for president in 2020 will do each of the following, if elected?

State-Specific Registered Voters



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Appendix

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

Open Ended Analysis Methodology

Open-end analyses **extracts narratives** from open-ended survey responses through the following process:

1 Preprocess

Leverage Natural Language Processing (NLP) techniques to standardize responses

2 Enrich

Enrich our understanding of each response via artificial neural networks trained on massive quantities of text data

3 Analyze

Apply an NLP technique called Term Frequency-Inverse Document Frequency (TF-IDF) to compare and analyze documents

4 Synthesize

Cluster responses into coherent, distinct narratives by conducting unsupervised machine learning modeling