



# Findings From A Statewide Survey And Focus Groups Of Likely 2016 Voters In Ohio



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# Key Findings

- Ohio Deserves Its Reputation As A Swing State
- Ohioans Are Not Negative About Their Economic Situation, But Dislike Most Politicians
- Jobs, Debt To China, And Terrorism Top Ohio Voters' Agendas
- Ohioans See Manufacturing As The Critical Centerpiece Of Our Economy And Believe Jobs Moving Overseas Is A Significant Threat
- Support For American Manufacturing & Manufacturers Is Nearly Universal
- Ohioans Favor An Array Of Pro-Manufacturing Steps Including Expanding Apprenticeships And Buying American When Taxpayers' Money is Spent
- While Voters Don't Hear Candidates Discussing These Issues, Kasich & Trump Are Perceived As Strongest On Manufacturing And Trade
- Candidates' Manufacturing Statements Hit Home With Ohioans



# Methodology

## ❖ Focus Groups:

- 3 groups in January 2016
- Columbus, OH
  - one group of Democrats
  - one group of swing voters
  - one group of Republicans

## ❖ Ohio Statewide Poll:

- 800 Likely 2016 General Election Voters—conducted February 27-March 2, 2016
- Margin Of Error +/- 3.5% (Higher For Subgroups)



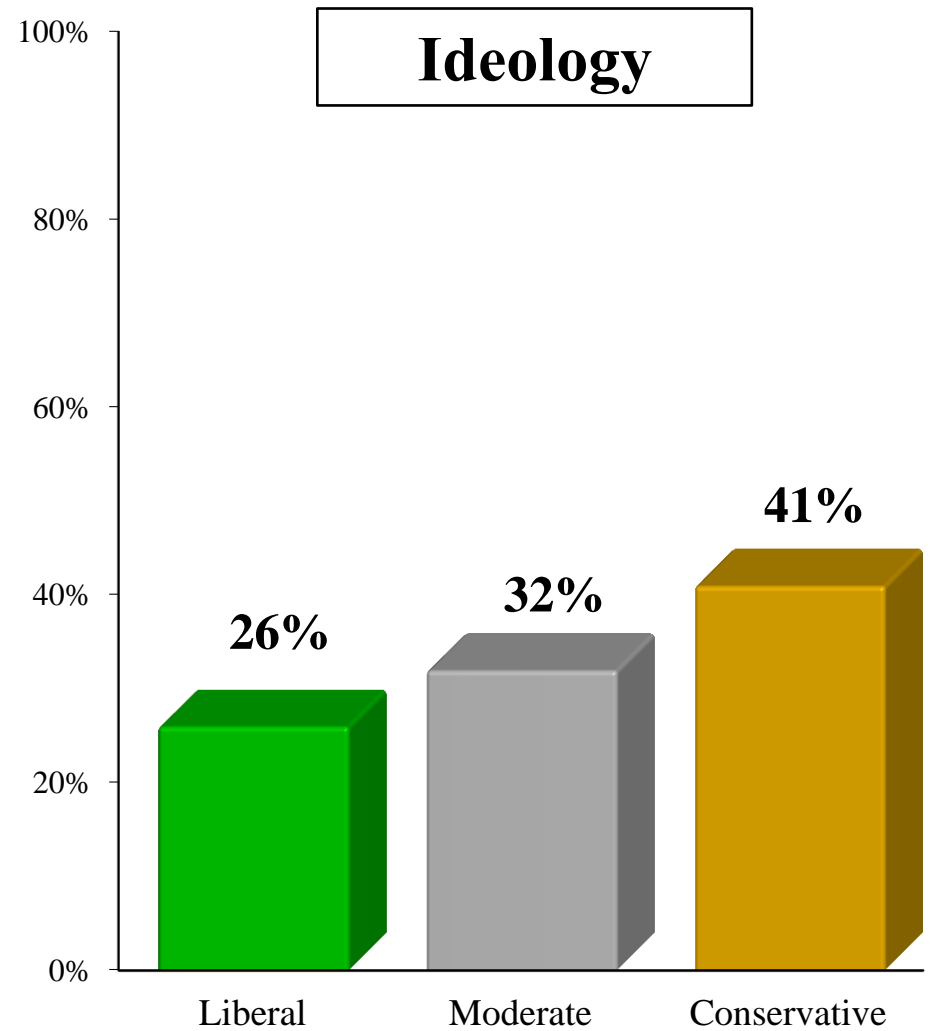
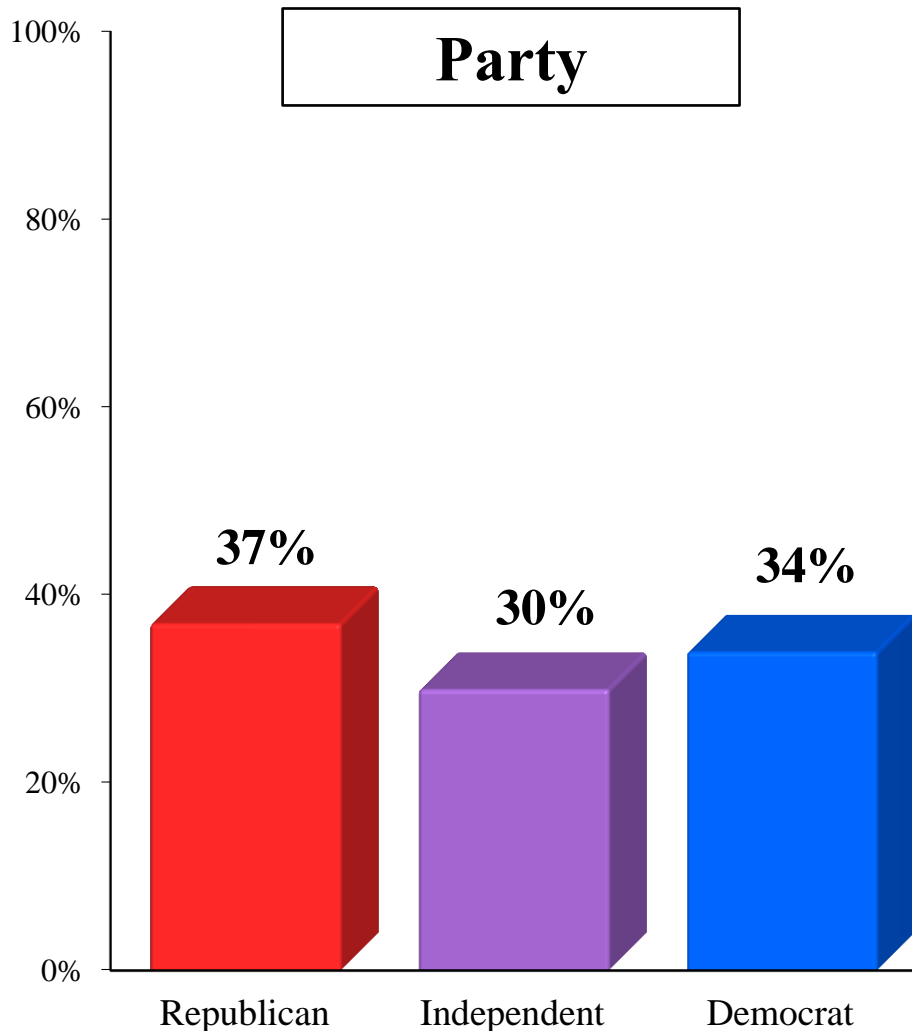
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# Ohio Deserves Its Reputation As A Swing State



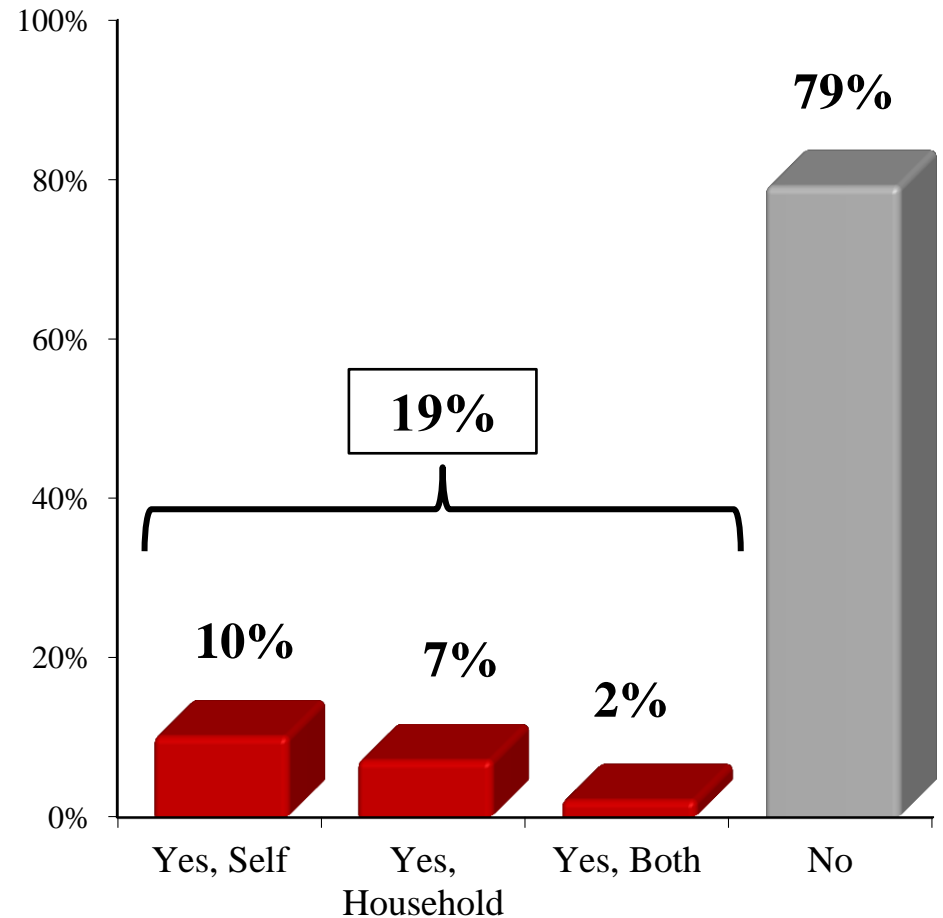
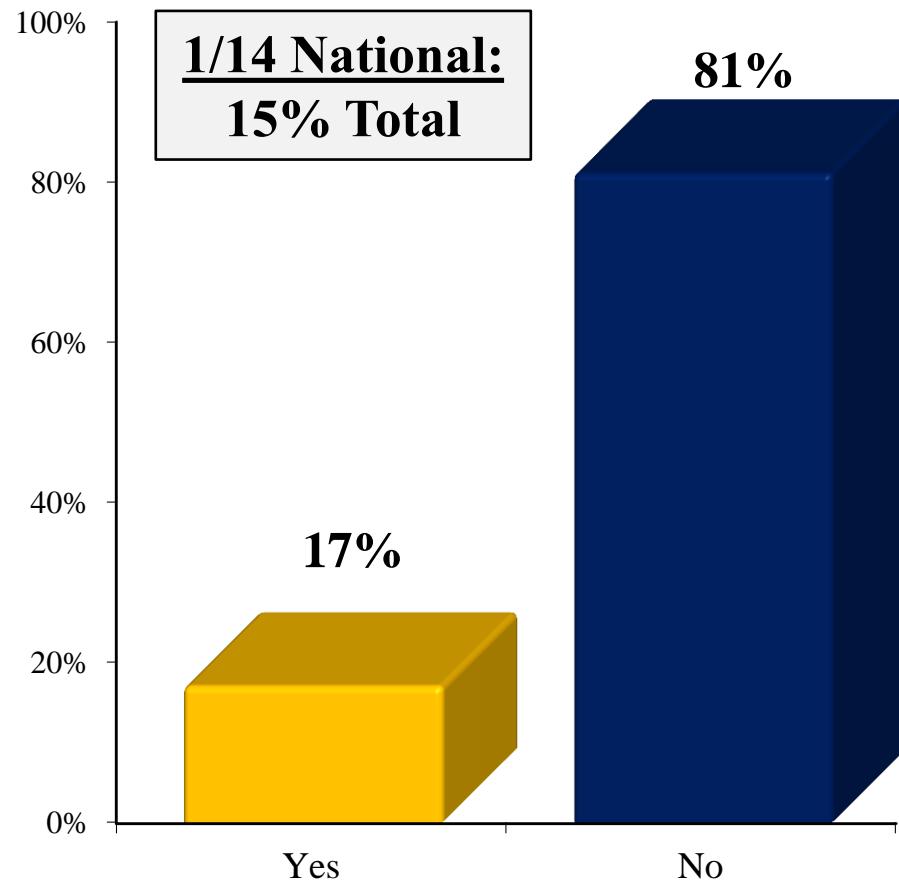
# A Narrow Plurality Identify As Republicans With A Larger Margin For Conservatives



# Nearly One In Five Are Dependent On Manufacturing With A Similar Number Unionized

*Is your household income dependent on manufacturing?*

*Do you, or does any member of your household, belong to a labor union?*



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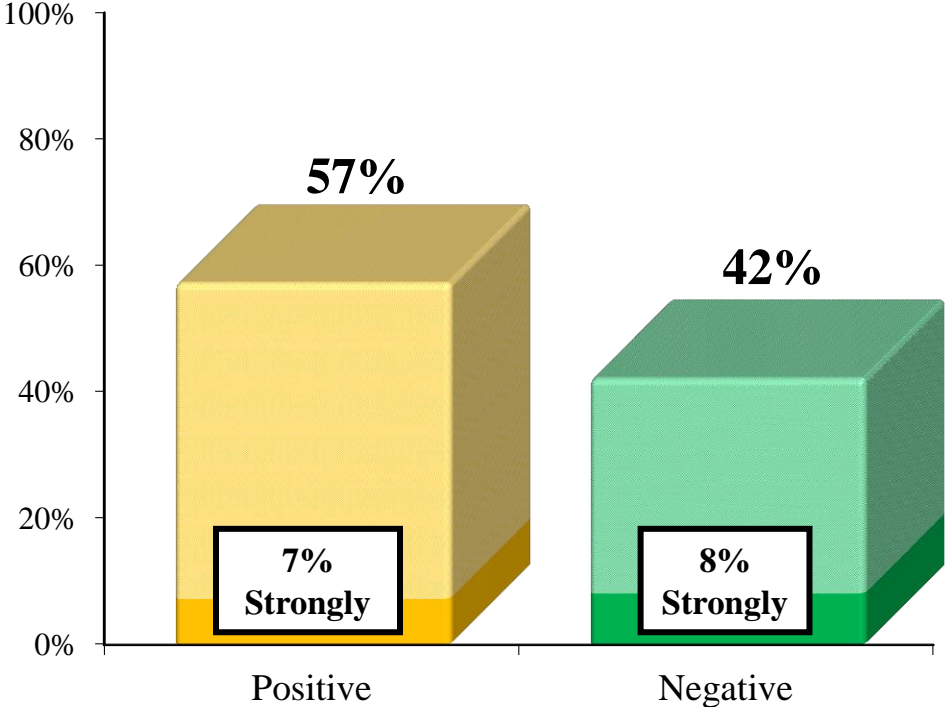


# Ohioans Are Not Negative About Their Economic Situation, But Dislike Most Politicians



# Ohioans Are Net Positive About Their Economic Situation, But Neither Positive Or Negative Views Are Intensely Felt

*How would you rate your economic situation - excellent, good, just fair, or poor?*



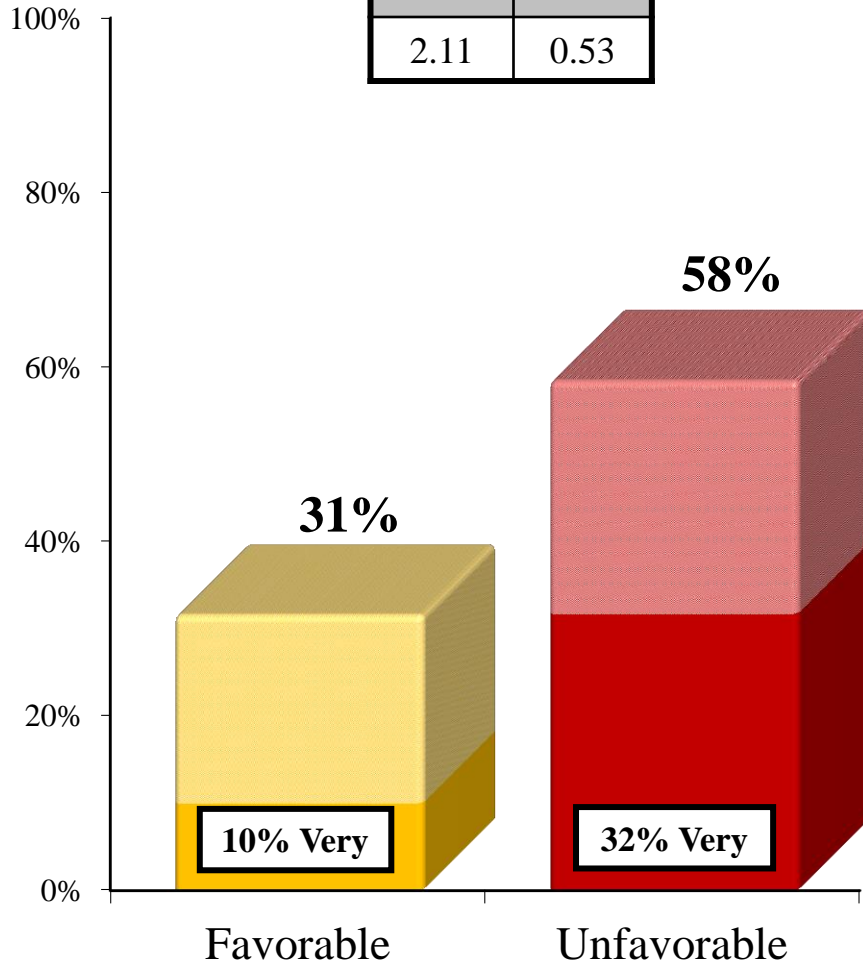
	Positive	Negative
Democrat ID	50%	50%
Independent ID	58%	40%
Republican ID	63%	37%
Male	59%	40%
Female	55%	44%
Under 50	57%	42%
50+	57%	42%
High School or Less	50%	49%
Some College	52%	48%
College Grad+	65%	34%
Cleveland	55%	43%
Cincinnati	59%	41%
Columbus	61%	38%
Rest of State	56%	43%
White	58%	40%
Black	46%	54%
Non-White	48%	52%
Union Household	52%	47%
Non-Union household	58%	40%
Mfg household	58%	42%
Non-mfg household	57%	42%



# Voters Express Unfavorable Views Of Congress, With Independents Particularly Negative

## U.S. Congress Favorability

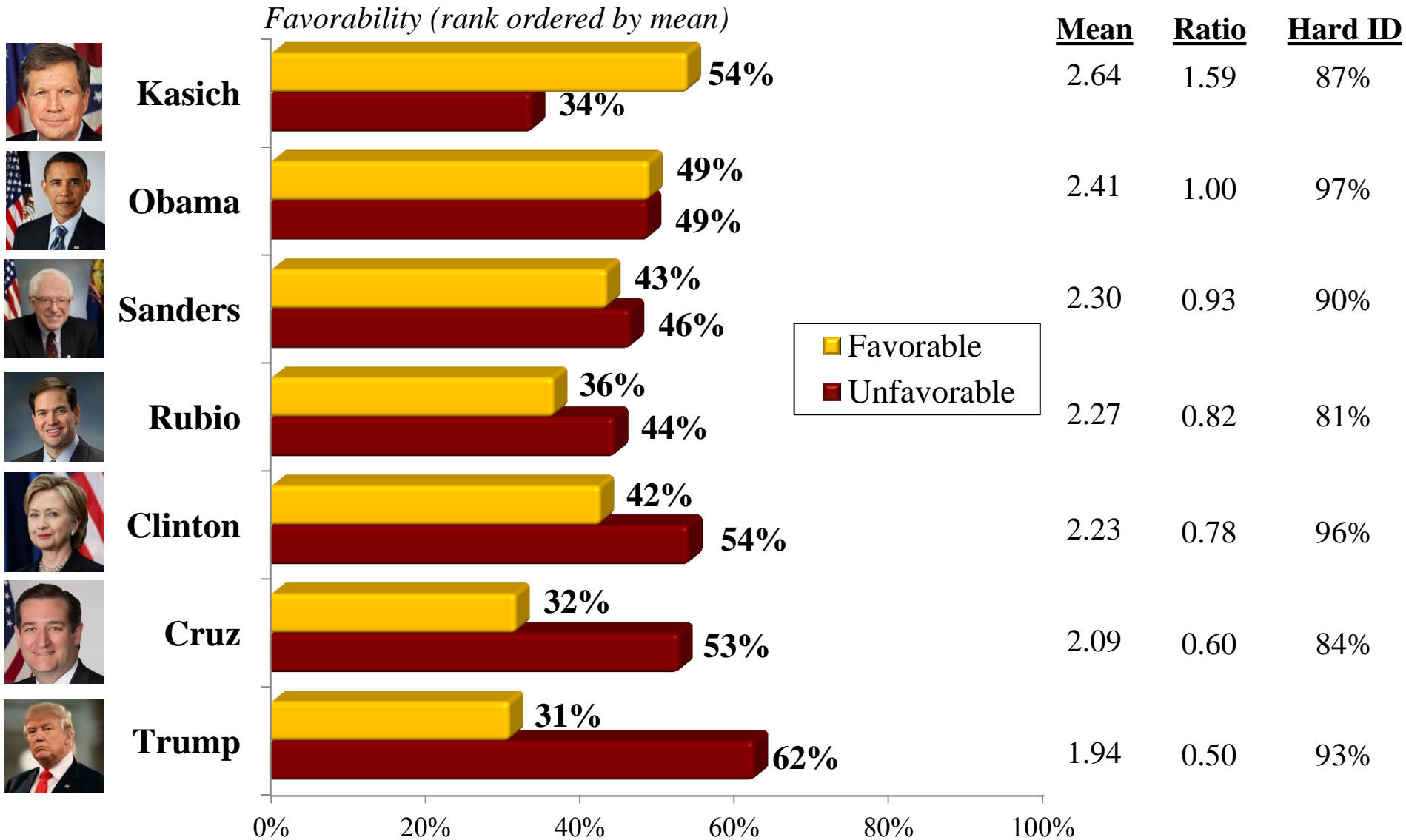
Mean	Ratio
2.11	0.53



	Fav	Unfav
Democrat ID	35%	57%
Independent ID	24%	65%
Republican ID	35%	54%
Male	30%	61%
Female	33%	56%
Under 50	34%	55%
50+	29%	61%
High School or Less	31%	52%
Some College	38%	53%
College Grad+	28%	66%
Cleveland	35%	58%
Cincinnati	26%	62%
Columbus	30%	58%
Rest of State	31%	58%
White	30%	60%
Black	45%	38%
Non-White	40%	45%
Union Household	29%	61%
Non-Union household	32%	58%
Mfg household	30%	65%
Non-mfg household	32%	57%



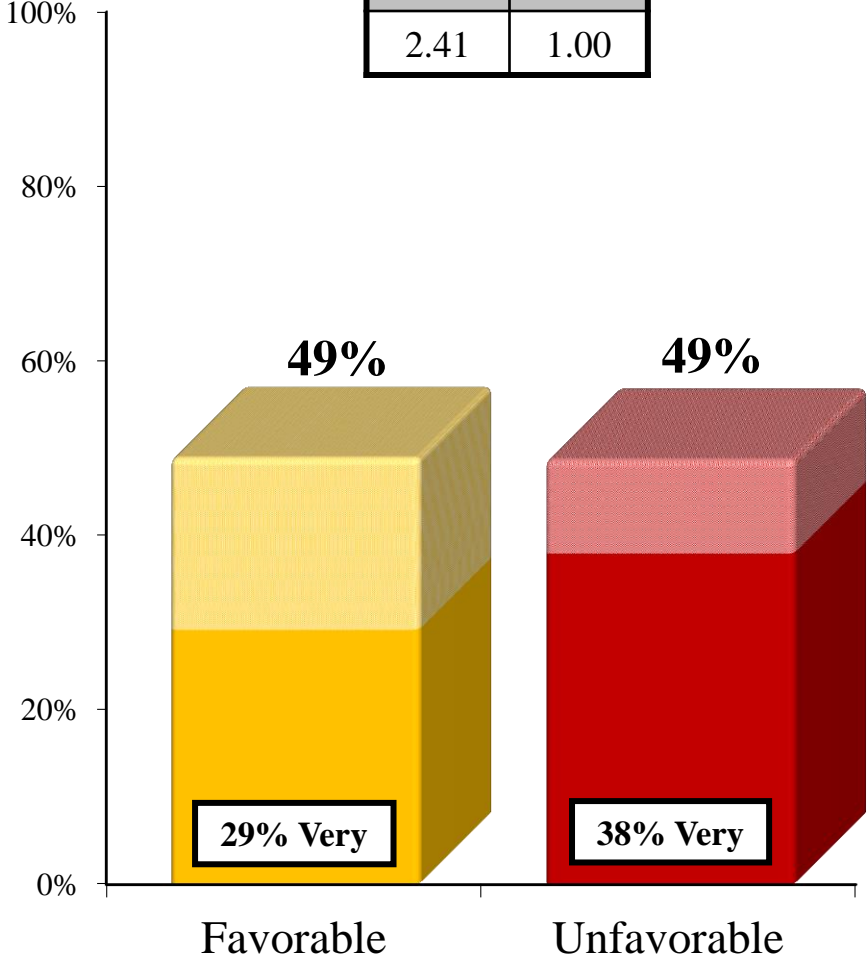
# Kasich Is The Only Politician Tested That Is Viewed Net Favorably In Ohio



# Obama Is A Polarizing Figure – A Majority Feel Either Very Favorable Or Very Unfavorable Towards The President

## Obama Favorability

Mean	Ratio
2.41	1.00



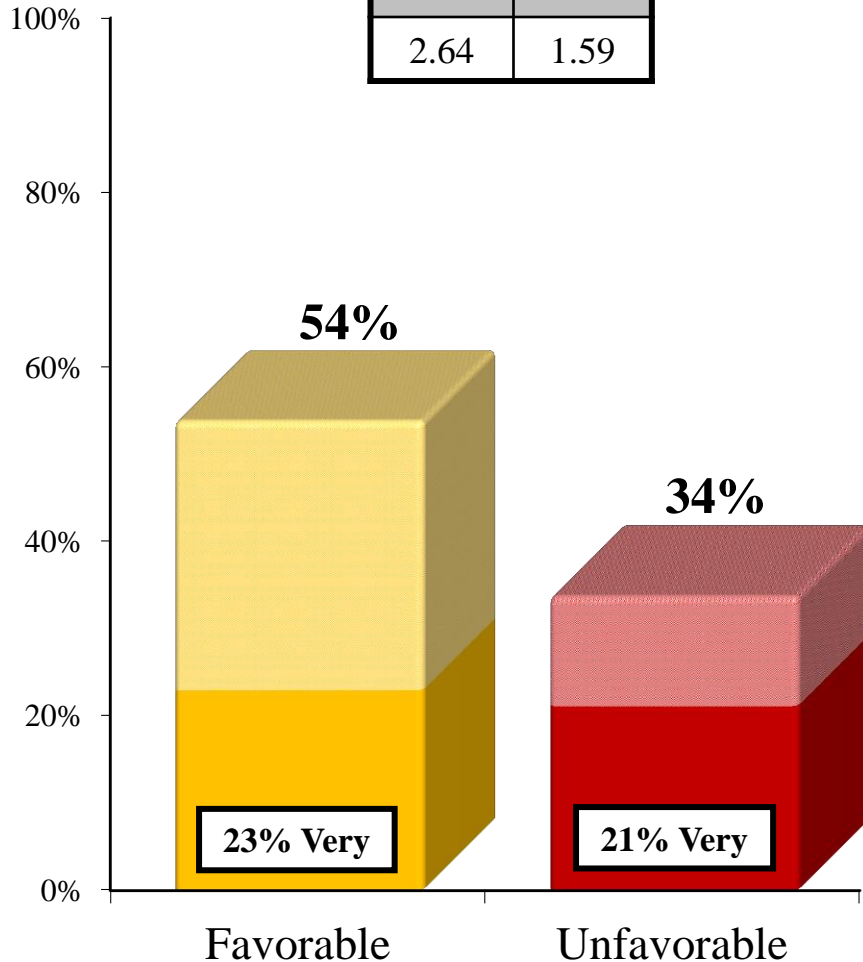
	Fav	Unfav
Democrat ID	88%	11%
Independent ID	50%	45%
Republican ID	12%	86%
Male	45%	53%
Female	52%	45%
Under 50	53%	45%
50+	45%	51%
High School or Less	48%	50%
Some College	49%	48%
College Grad+	49%	48%
Cleveland	52%	45%
Cincinnati	45%	50%
Columbus	52%	47%
Rest of State	45%	52%
White	43%	55%
Black	90%	7%
Non-White	79%	18%
Union Household	59%	38%
Non-Union household	47%	51%
Mfg household	40%	57%
Non-mfg household	51%	47%



# Kasich Is Popular, Even Among Independents

## Kasich Favorability

Mean	Ratio
2.64	1.59



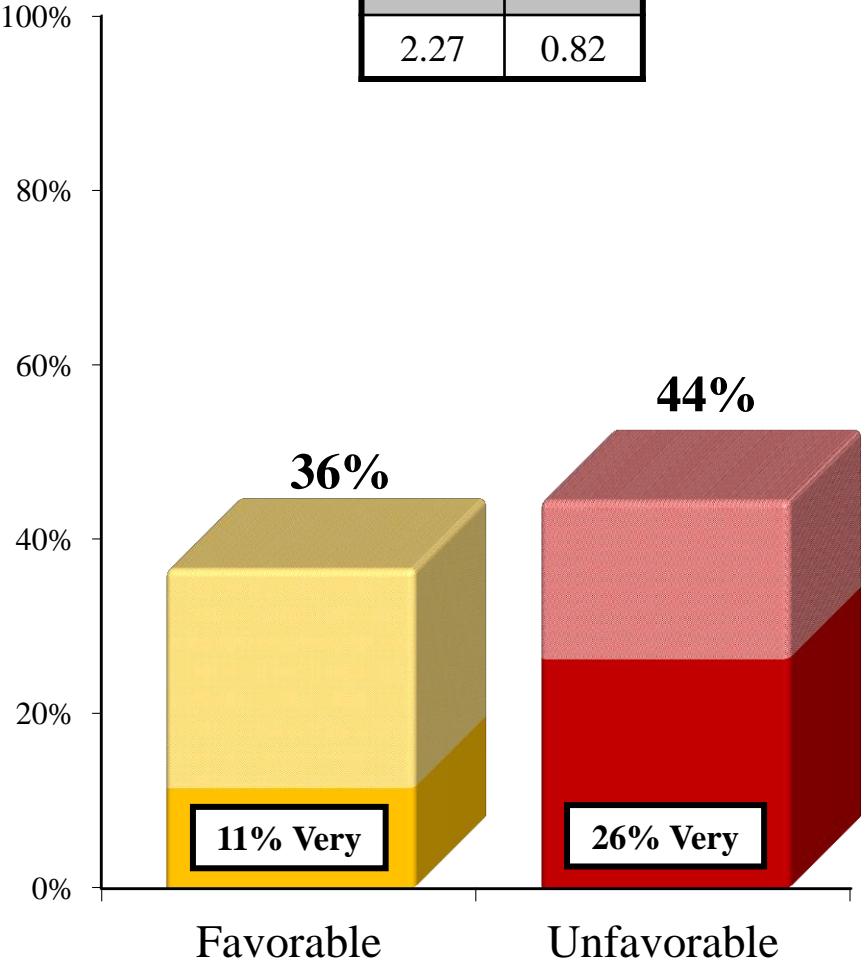
	Fav	Unfav
Democrat ID	37%	49%
Independent ID	52%	31%
Republican ID	70%	22%
Male	55%	34%
Female	52%	33%
Under 50	49%	37%
50+	58%	31%
High School or Less	51%	34%
Some College	56%	34%
College Grad+	53%	34%
Cleveland	51%	33%
Cincinnati	49%	34%
Columbus	53%	38%
Rest of State	59%	31%
White	55%	33%
Black	35%	44%
Non-White	44%	37%
Union Household	47%	45%
Non-Union household	55%	31%
Mfg household	59%	33%
Non-mfg household	52%	34%



# Rubio Is Less Well Known Among Independents, And Most Of Those Who Know Him Lack Strong Feelings

## Rubio Favorability

Mean	Ratio
2.27	0.82

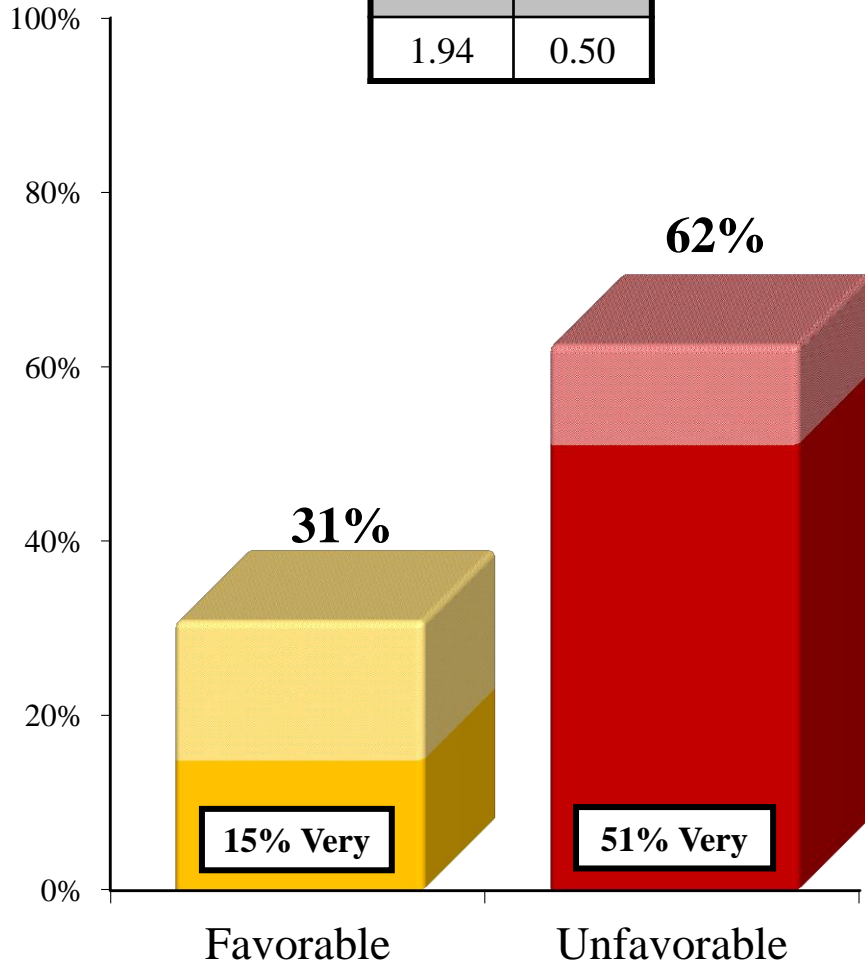


	Fav	Unfav
Democrat ID	18%	62%
Independent ID	35%	39%
Republican ID	54%	33%
Male	37%	48%
Female	36%	41%
Under 50	37%	42%
50+	36%	46%
High School or Less	32%	44%
Some College	36%	44%
College Grad+	39%	45%
Cleveland	30%	48%
Cincinnati	38%	46%
Columbus	35%	48%
Rest of State	43%	38%
White	40%	43%
Black	18%	48%
Non-White	21%	52%
Union Household	29%	51%
Non-Union household	38%	43%
Mfg household	40%	42%
Non-mfg household	36%	45%

# A Majority Of Ohioans Feel Very Unfavorably Toward Trump – But Republicans Are Net Favorable Towards Him

## Trump Favorability

Mean	Ratio
1.94	0.50



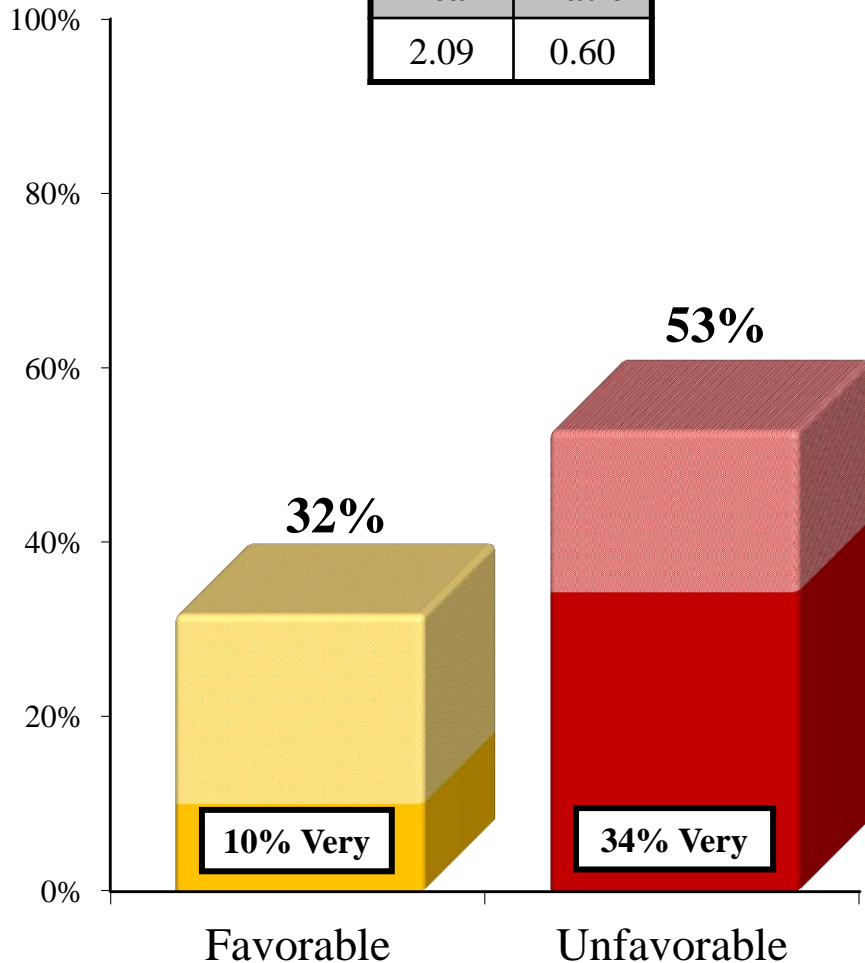
	Fav	Unfav
Democrat ID	8%	88%
Independent ID	25%	61%
Republican ID	56%	40%
Male	36%	57%
Female	26%	67%
Under 50	29%	66%
50+	32%	59%
High School or Less	38%	53%
Some College	29%	65%
College Grad+	27%	68%
Cleveland	30%	62%
Cincinnati	31%	62%
Columbus	32%	62%
Rest of State	31%	63%
White	34%	59%
Black	7%	85%
Non-White	14%	81%
Union Household	23%	71%
Non-Union household	32%	61%
Mfg household	38%	57%
Non-mfg household	29%	64%



# Cruz Is Viewed Unfavorably By A Majority Of Ohioans – But Is Net Favorable Among Republicans

## Cruz Favorability

Mean	Ratio
2.09	0.60



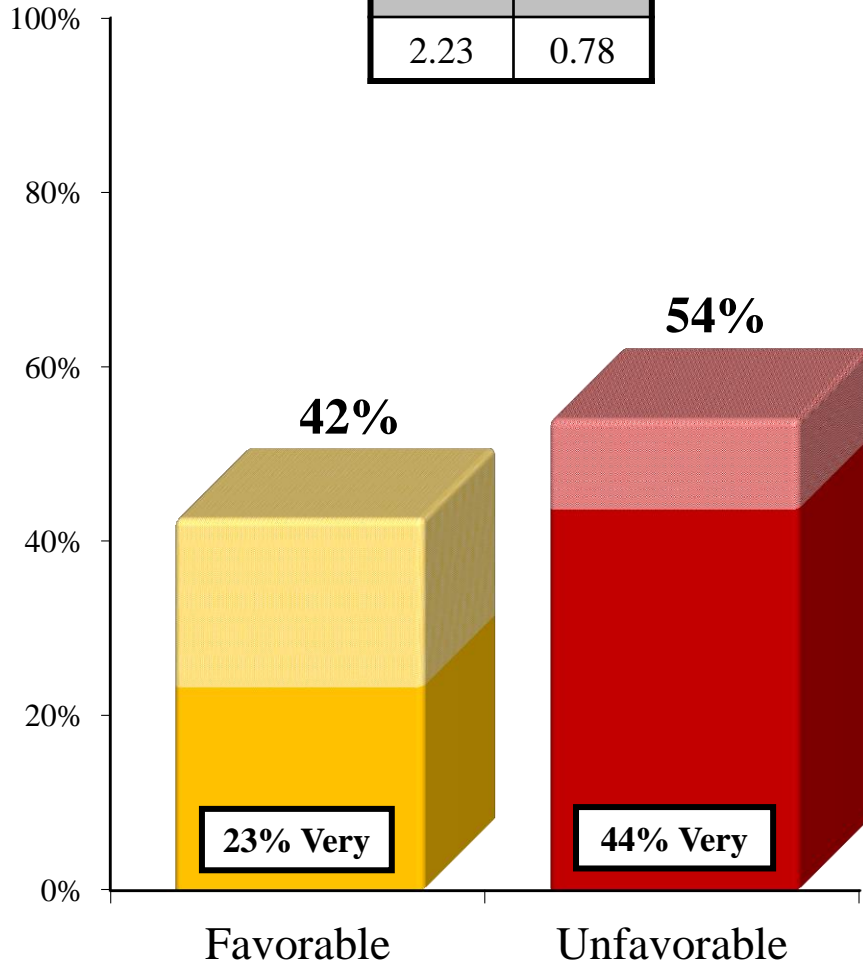
	Fav	Unfav
Democrat ID	12%	69%
Independent ID	25%	58%
Republican ID	54%	34%
Male	36%	53%
Female	28%	53%
Under 50	30%	54%
50+	33%	51%
High School or Less	30%	54%
Some College	34%	50%
College Grad+	32%	53%
Cleveland	26%	56%
Cincinnati	33%	53%
Columbus	30%	54%
Rest of State	38%	48%
White	34%	52%
Black	16%	57%
Non-White	22%	56%
Union Household	30%	56%
Non-Union household	32%	53%
Mfg household	35%	52%
Non-mfg household	31%	53%



# A Majority Of Ohioans View Hillary Clinton Unfavorably

## Clinton Favorability

Mean	Ratio
2.23	0.78



	Fav	Unfav
Democrat ID	83%	14%
Independent ID	40%	52%
Republican ID	8%	91%
Male	37%	60%
Female	47%	48%
Under 50	44%	54%
50+	41%	54%
High School or Less	42%	55%
Some College	44%	52%
College Grad+	41%	55%
Cleveland	45%	51%
Cincinnati	39%	58%
Columbus	42%	54%
Rest of State	42%	55%
White	37%	59%
Black	75%	19%
Non-White	68%	28%
Union Household	49%	46%
Non-Union household	41%	56%
Mfg household	33%	66%
Non-mfg household	45%	51%

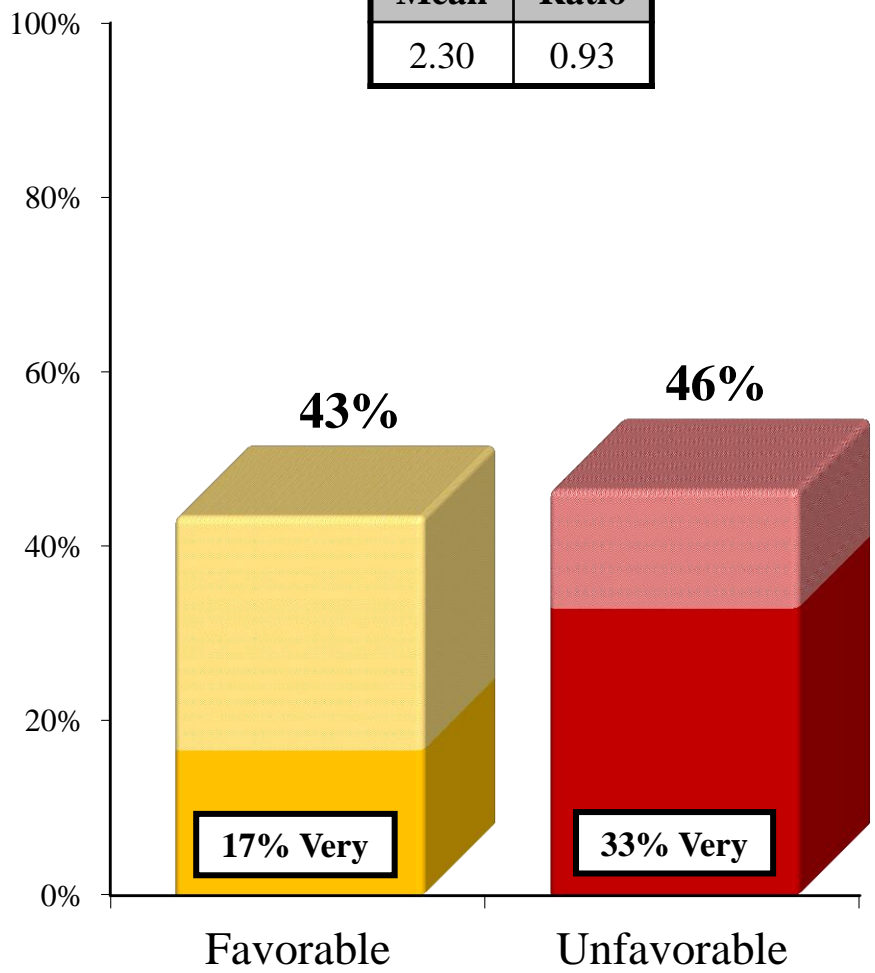




# Sanders Garner Mixed Reviews, But Is Net Favorable Among Independents As Well As Democrats

## Sanders Favorability

Mean	Ratio
2.30	0.93



	Fav	Unfav
Democrat ID	68%	21%
Independent ID	45%	40%
Republican ID	19%	75%
Male	43%	50%
Female	44%	43%
Under 50	50%	41%
50+	38%	51%
High School or Less	35%	55%
Some College	51%	41%
College Grad+	44%	44%
Cleveland	41%	46%
Cincinnati	47%	46%
Columbus	43%	46%
Rest of State	44%	47%
White	42%	49%
Black	54%	27%
Non-White	51%	33%
Union Household	55%	36%
Non-Union household	41%	49%
Mfg household	41%	51%
Non-mfg household	44%	45%

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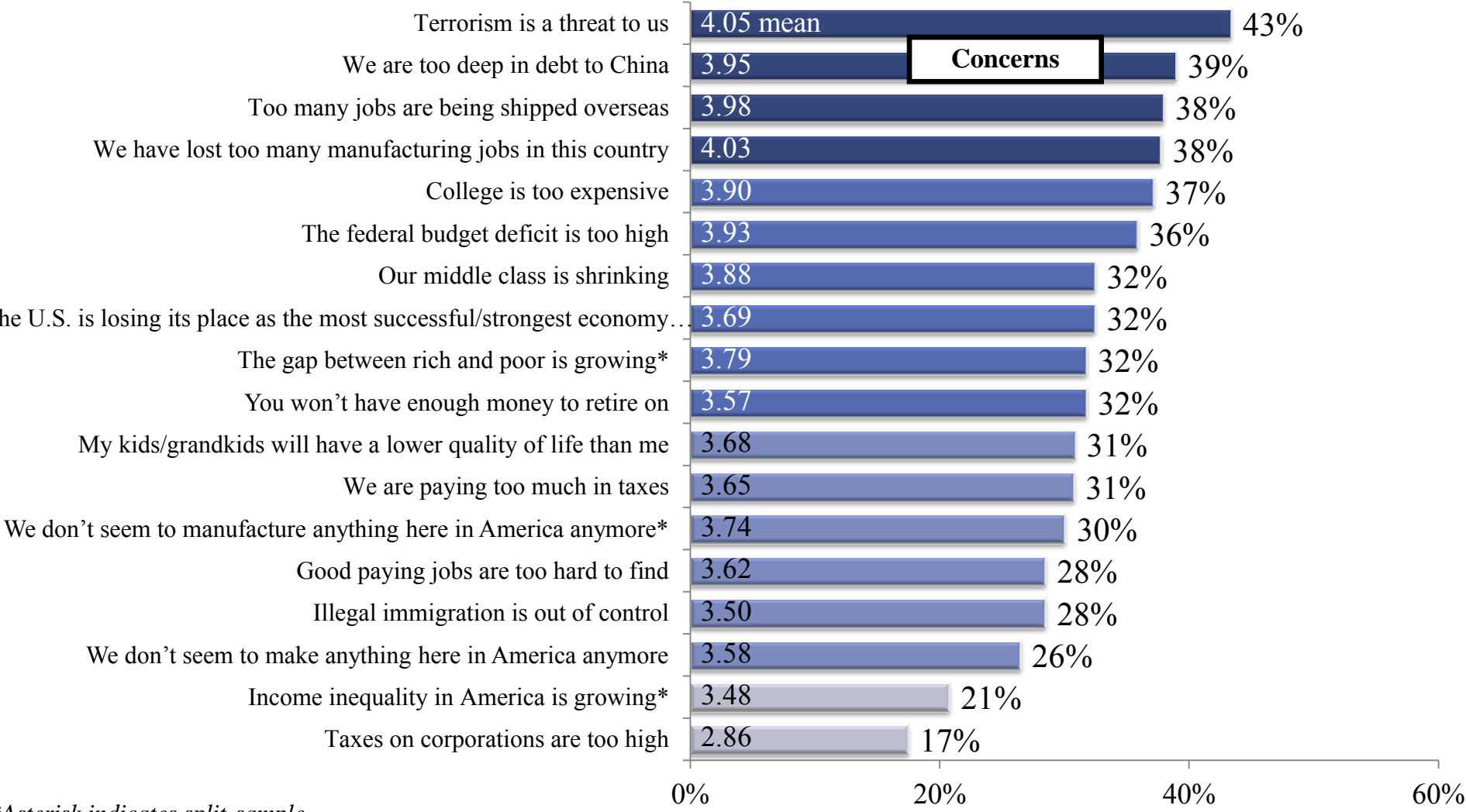


# Jobs, Debt To China, And Terrorism Top Ohio Voters' Agendas



# While Terrorism Tops Voters' Concerns, Debt To China, Jobs Going Overseas & Loss Of Manufacturing Jobs Are Also Major Worries

Ranked by worries the most

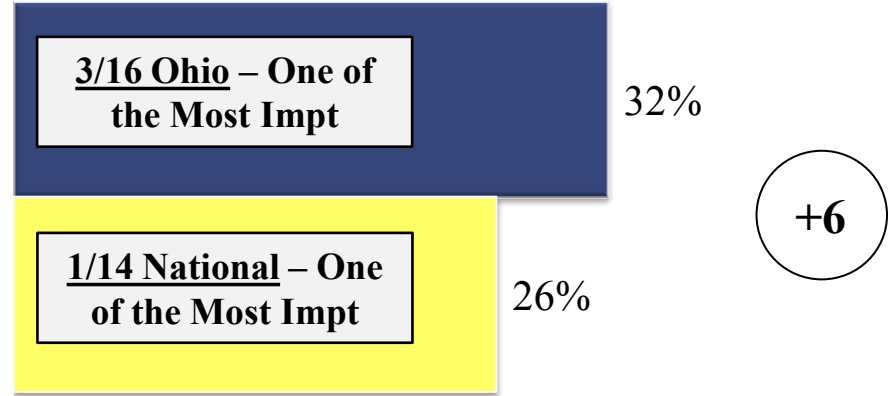


\*Asterisk indicates split-sample

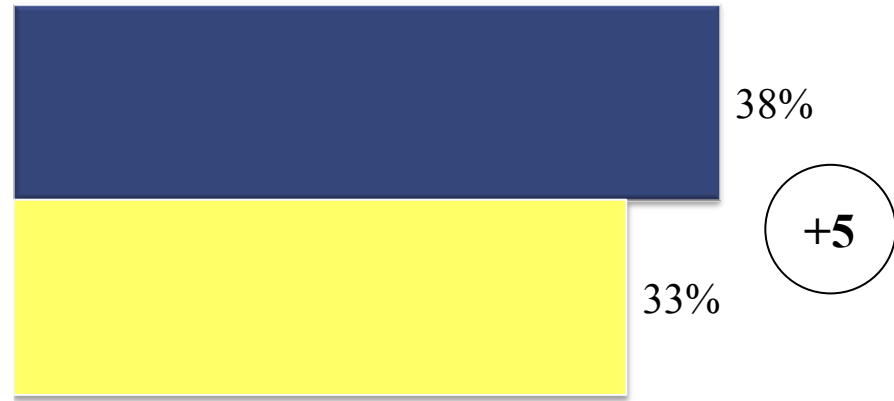


# Concern About Losing Manufacturing Jobs And A Shrinking Middle Class Are Much Higher in Ohio Than Nationally Two Years Ago

Our middle class is shrinking



We have lost too many manufacturing jobs in this country



0% 10% 20% 30% 40% 50%



# Top Concerns Are Similar Across Party – Though GOPers Express More Concern About Terrorism & The Deficit, With Democrats More Focused On Inequality

<b>Top Concerns</b> <i>(Ranked by worries the most) *Asterisk indicates split-sample</i>	<b>Total</b>	<b>Dem</b>	<b>Ind</b>	<b>GOP</b>
Terrorism is a threat to us	<b>43%</b>	42%	37%	50%
We are too deep in debt to China	<b>39%</b>	35%	41%	41%
Too many jobs are being shipped overseas	<b>38%</b>	39%	35%	39%
We have lost too many manufacturing jobs in this country	<b>38%</b>	35%	35%	42%
College is too expensive	<b>37%</b>	45%	35%	32%
The federal budget deficit is too high	<b>36%</b>	27%	36%	43%
Our middle class is shrinking	<b>32%</b>	30%	31%	35%
The U.S. is losing its place as the most successful/strongest economy in the world	<b>32%</b>	36%	30%	32%
The gap between rich and poor is growing*	<b>32%</b>	41%	36%	19%
You won't have enough money to retire on	<b>32%</b>	37%	30%	28%
My kids/grandkids will have a lower quality of life than me	<b>31%</b>	32%	29%	31%
We are paying too much in taxes	<b>31%</b>	31%	29%	32%
We don't seem to manufacture anything here in America anymore*	<b>30%</b>	30%	31%	29%
Good paying jobs are too hard to find	<b>28%</b>	35%	24%	26%
Illegal immigration is out of control	<b>28%</b>	21%	21%	39%
We don't seem to make anything here in America anymore	<b>26%</b>	28%	19%	30%
Income inequality in America is growing*	<b>21%</b>	29%	20%	14%
Taxes on corporations are too high	<b>17%</b>	14%	14%	23%

# Our Debt To China Is A Major Concern, Particularly Among Republicans

“We owe [China] billions, in a way they own us.” – OH swing male

“As a country, as a whole, we are extremely in debt to China financially.” – OH GOP male

“China investing into stocks in American companies where there are American companies there that aren’t American anymore. One example, LL Bean. It is Chinese owned now, but people still say made in America on it.. – OH GOP male

“Well, they own us.” – OH GOP male

“They have a lot of power over us because of all we owe them.” – OH GOP male

“It is scary the power they have and the financial control they have in our world right now. It is everybody’s fault.” – OH GOP male

“We have to eliminate the debt that we owe China before we can go after them. We have to. That’s cut and dry. As long as we are indebted to them trillions of dollars, we are in trouble. – OH GOP male



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**Ohioans See Manufacturing As The Critical  
Centerpiece Of Our Economy And Believe Jobs  
Moving Overseas Is A Significant Threat**

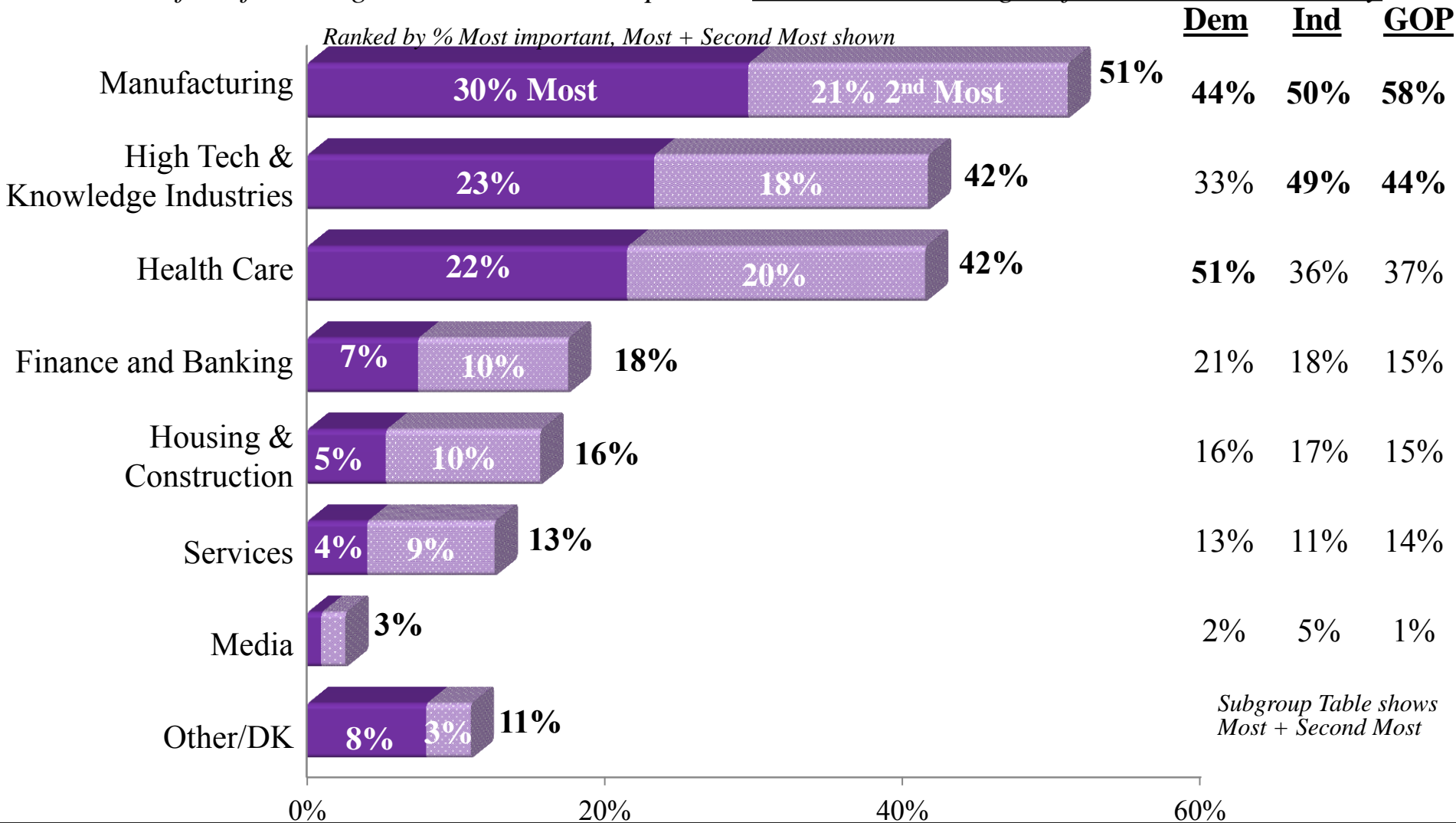


# Manufacturing Is Judged The Most Important To The Strength Of America's Economy

Republicans Are Even More Likely To Endorse This View

*Which of the following industries is most important to the overall strength of the American economy?*

*Ranked by % Most important, Most + Second Most shown*



*Subgroup Table shows Most + Second Most*



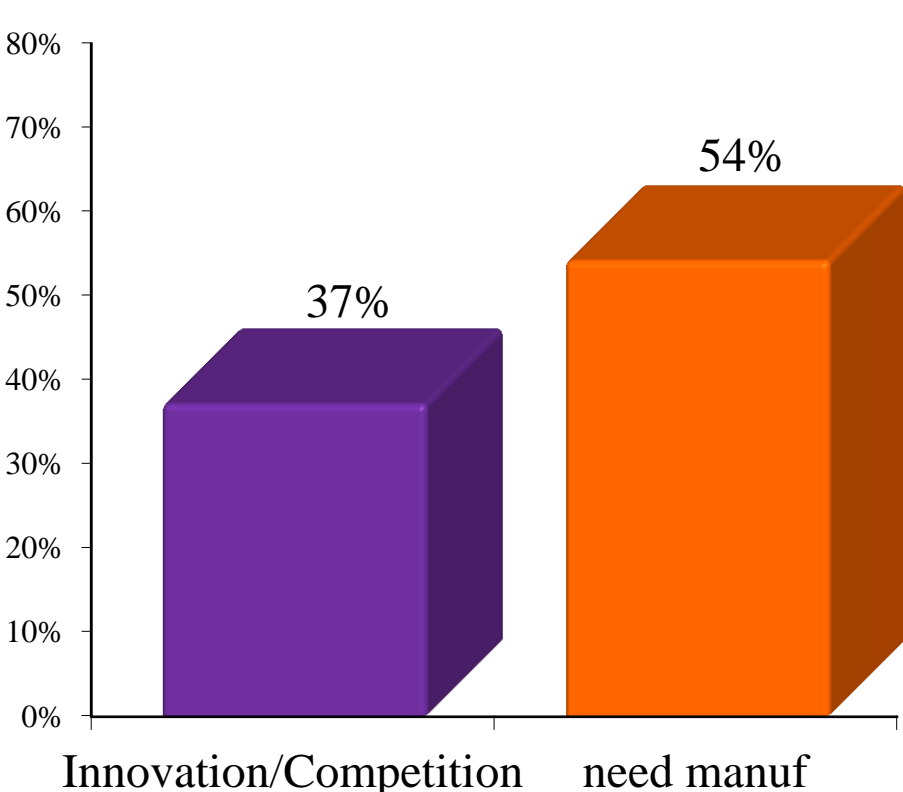
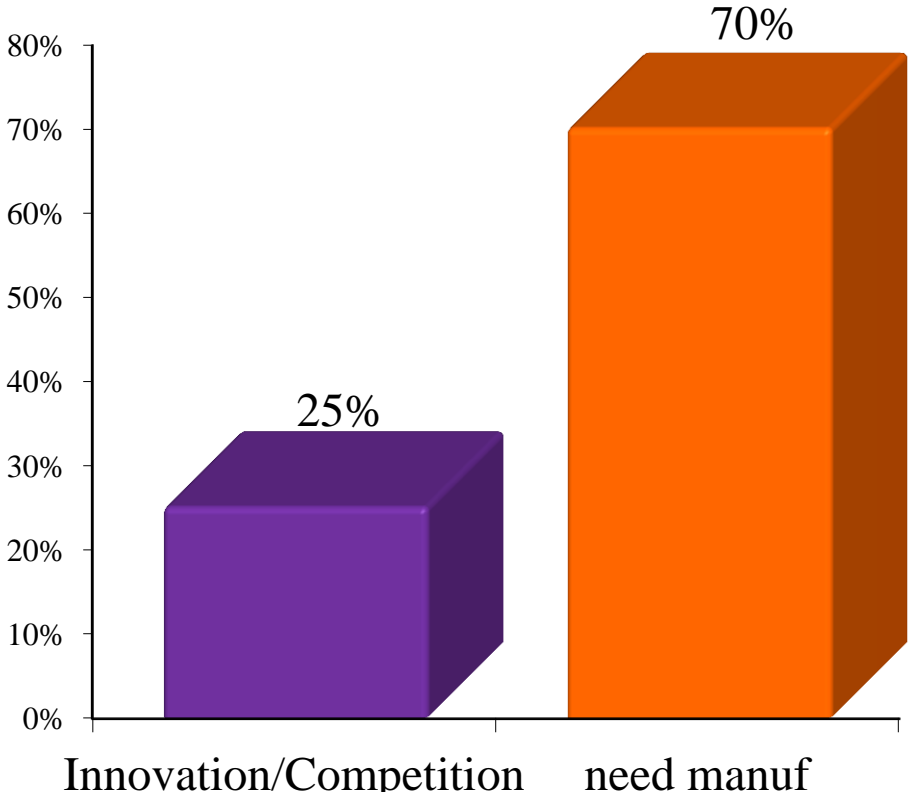


# Most Believe Manufacturing Is Critical To The American Economy And A Majority Say It's The Most Important

● The strength of the American economy is innovation and competition – and if manufacturing leaves, we will move into new areas like high-tech or services which will take its place in the future.

● Manufacturing is a critical part of the American economy and we need a manufacturing base here if this country and our children are to thrive in the future.

● Manufacturing is the single most important part of the American economy and we need a manufacturing base here if this country and our children are to thrive in the future.

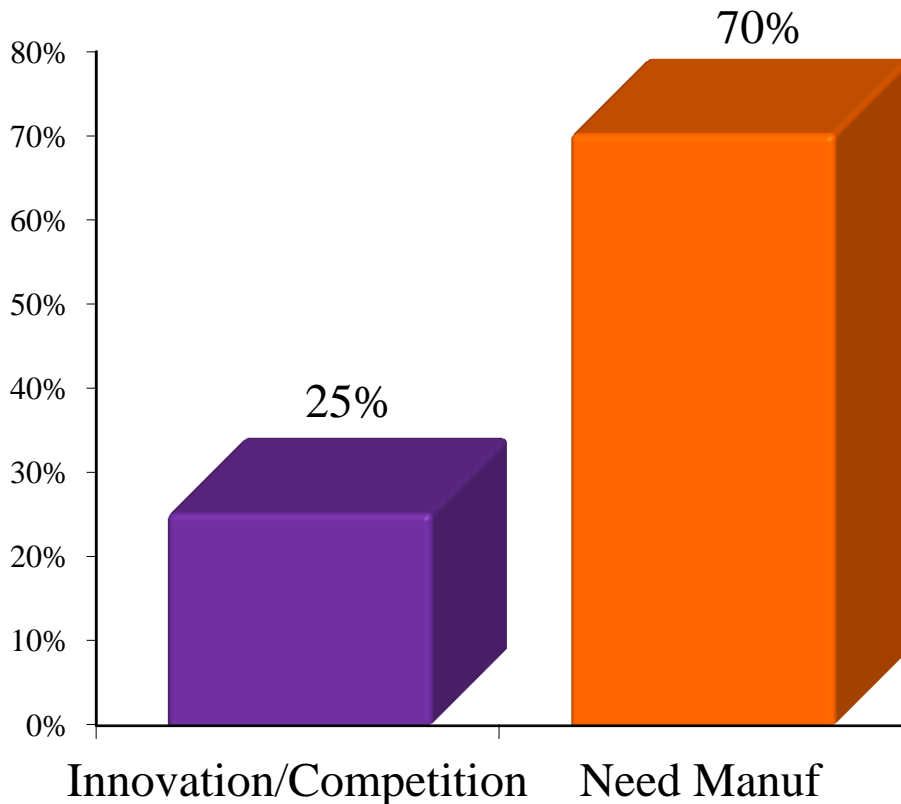


\*Questions split-sampled

# Voters Across All Subgroups Believe Manufacturing Is Critical

The strength of the American economy is innovation and competition – and if manufacturing leaves, we will move into new areas like high-tech or services which will take its place in the future.

Manufacturing is a critical part of the American economy and we need a manufacturing base here if this country and our children are to thrive in the future.



	New Areas Replace	Need Manufact'g
Democrat ID	25%	71%
Independent ID	25%	70%
Republican ID	24%	71%
Male	29%	67%
Female	21%	73%
Under 50	29%	71%
50+	21%	70%
High School or Less	16%	78%
Some College	27%	69%
College Grad+	29%	66%
Cleveland	24%	73%
Cincinnati	35%	57%
Columbus	22%	72%
Rest of State	24%	72%
White	24%	70%
Black	27%	73%
Non-white	28%	71%
Union Household	20%	78%
Non-Union household	26%	69%
Manufacturing hhold	24%	68%
Non-Manuf hhold	25%	71%

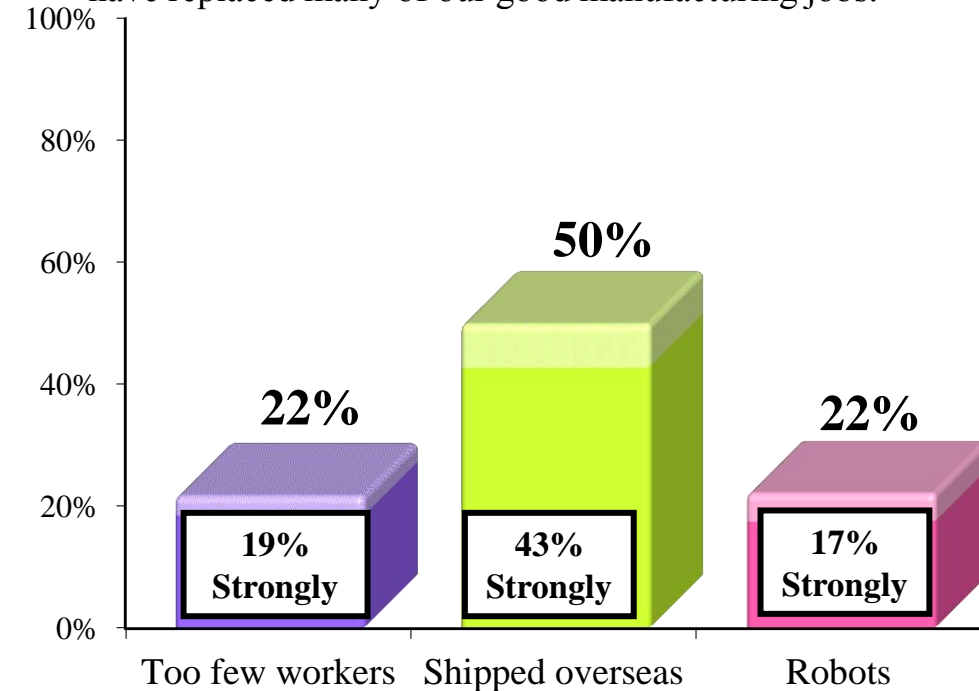


# Voters See Jobs Shipped Overseas As The Biggest Reason For Job Loss In Manufacturing, Not Technology Or Skills

## This View Too Cuts Across Segments

Which of the following statements comes closer to your point of view?

- The main reason that few jobs have been created in manufacturing recently is that there are few skilled workers who could fill those positions.
- The main reason that few jobs have been created in manufacturing recently is that too many of those jobs have been shipped overseas.
- The main reason that few jobs have been created in manufacturing recently is that robotics and new technologies have replaced many of our good manufacturing jobs.



	workers	overseas	robots
Democrat ID	22%	49%	22%
Independent ID	24%	42%	27%
Republican ID	19%	56%	17%
Male	22%	49%	22%
Female	21%	50%	22%
Under 50	24%	49%	22%
50+	19%	50%	21%
HS or Less	23%	48%	21%
Some College	22%	52%	19%
College Grad+	21%	49%	24%
Cleveland	20%	47%	26%
Cincinnati	21%	55%	20%
Columbus	21%	48%	23%
Rest of State	23%	51%	18%
White	21%	50%	22%
Black	23%	51%	23%
Non-white	26%	48%	22%
Union Household	18%	55%	23%
Non-Union hhold	22%	49%	21%
Manuf hhold	27%	51%	17%
Non-Manuf hhold	20%	50%	23%



# Participants Blamed Outsourcing For The Decline In Manufacturing Jobs

“I think that profit is a really huge incentive to owners of companies. Whereas you could spend money on the robots to do the manufacturing to eventually phase out the workers who cost you more money or you could just send your stuff to somewhere else where it is cheaper to make and your profit increases exponentially quickly. I think the interest in profit to those who own the companies and the idea of getting it “I want it now” is going to take precedence over the idea of a gradual eventual replacement of employees with machines.” – OH Dem female

“No, I still think that we are outsourcing and the unfair trade and things like that. I think going to whatever way we can make more money if we can build a factory and it doesn't have the same health regulations in Mexico and we don't have to provide them with healthcare and we don't have to worry about if they take a day off because we will fire them, all of those things.” – OH Dem male

“I think things move because of the cost of production. The cost of production is not just the wages of people, but it is also the associated taxes, the regulations that area associated with it. Everything goes into the cost of the item. A company is going to naturally look if I can produce this for half price somewhere else I am going to do that. The corporation has no loyalty.” – OH GOP male



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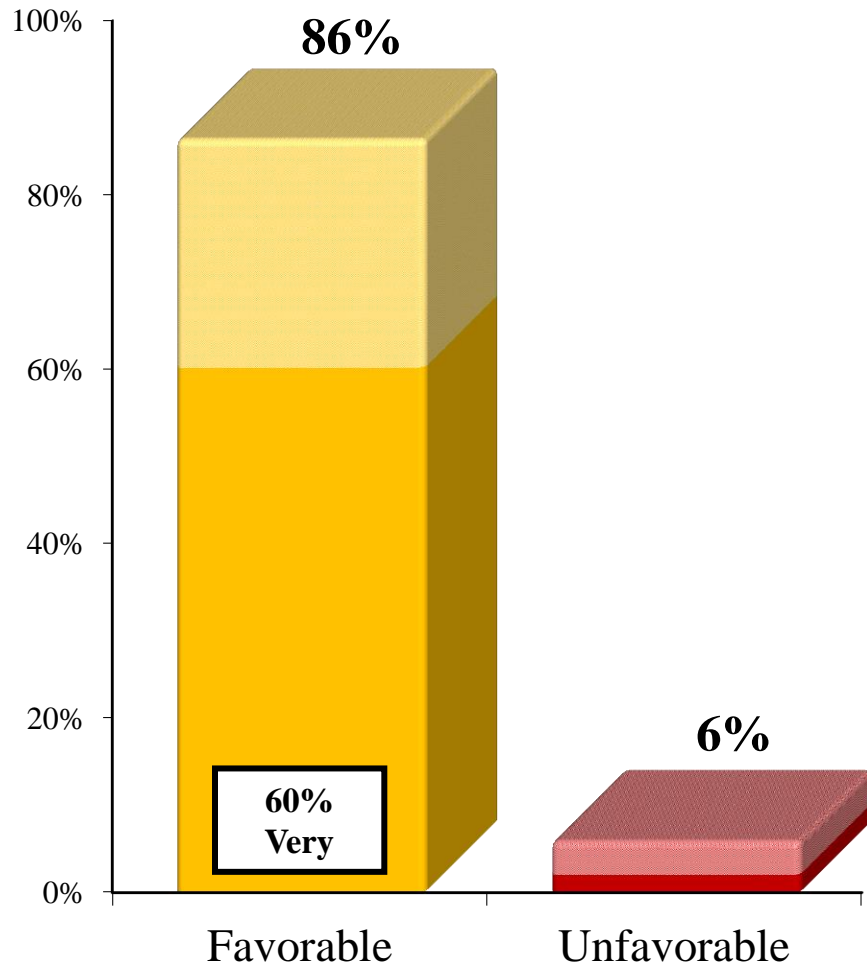
# Support For American Manufacturing And Manufacturers Is Nearly Universal



# Ohioans Are Overwhelmingly Favorable Towards American Manufacturing And Workers

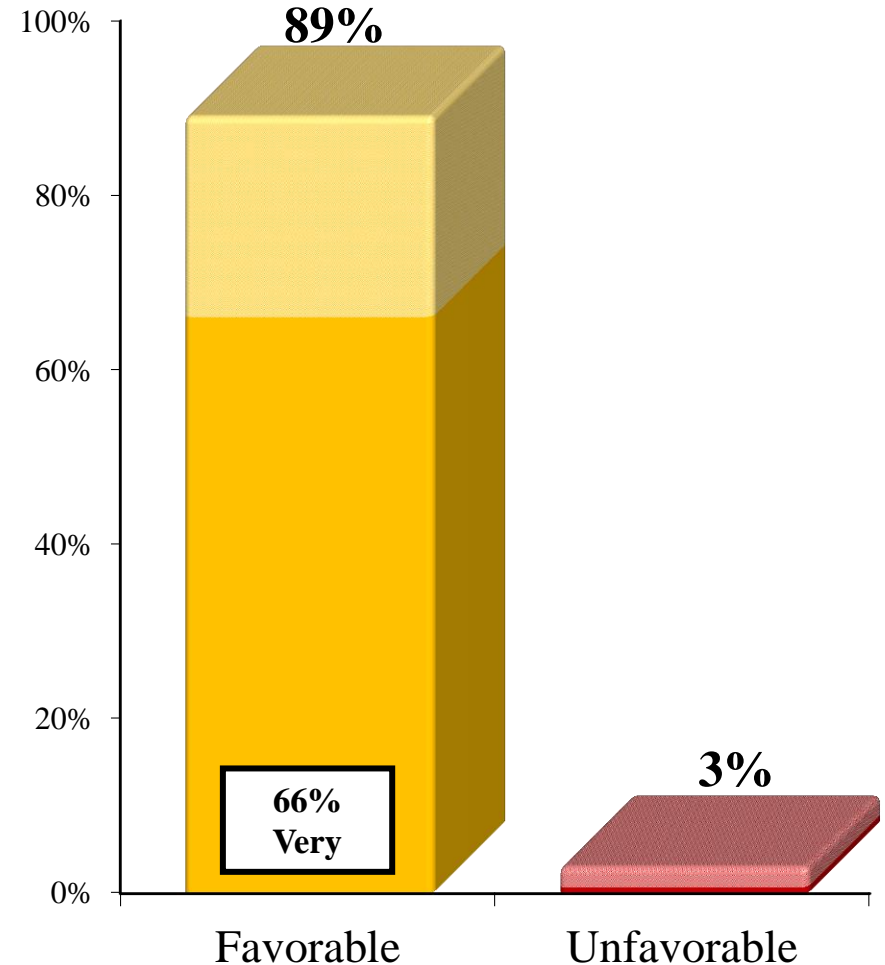
## American Manufacturing Companies

### Favorability



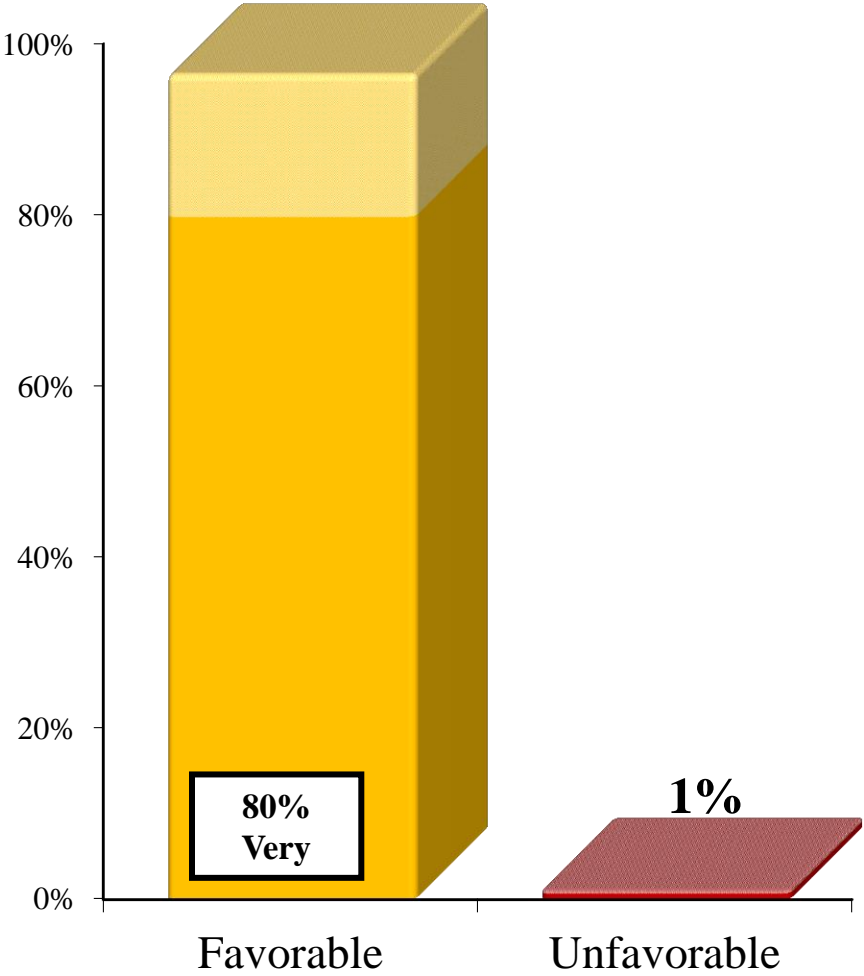
## American Manufacturing Workers

### Favorability

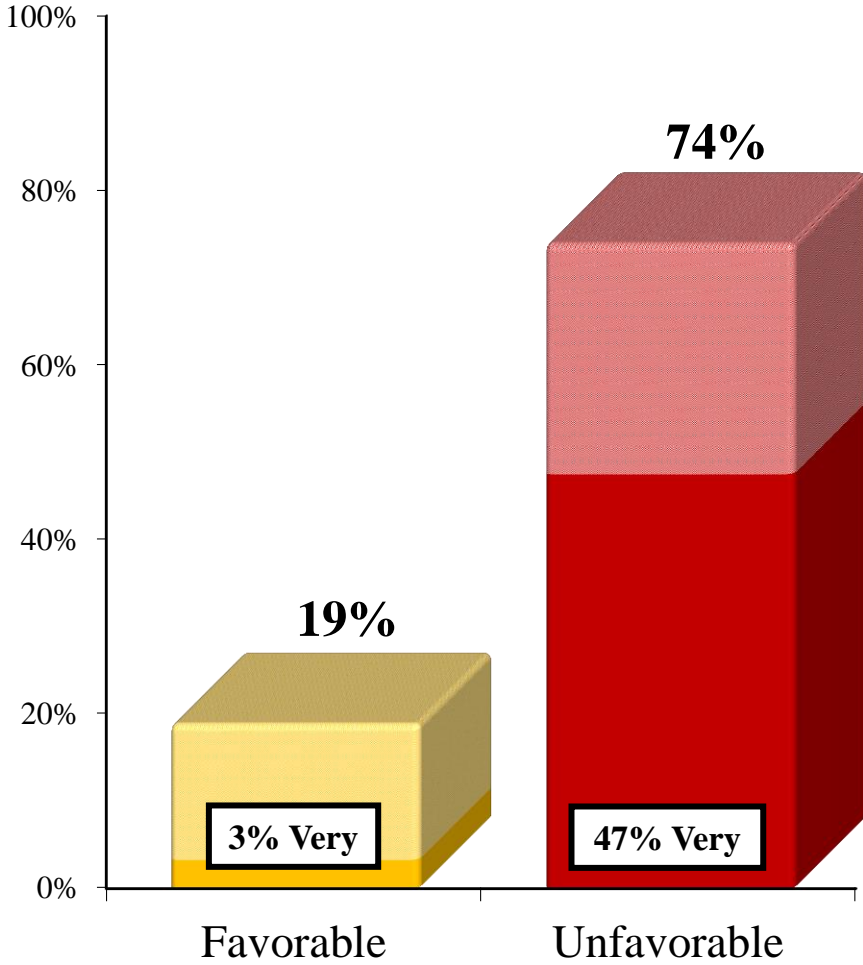


# Products Made In America Are Viewed Extremely Favorably, In Contrast With A Negative Impression Of China Products

Manufactured Goods Made in America Favorability  
**96%**



Manufactured Goods Made in China Favorability



# “Made In America” Should Mean Wholly Made In America As Far As Participants Were Concerned

“When I think of made in America I think it actually was made here. Designed here, made here, everything. That is what I would think it means. – OH Dem female

“If ...there was some part or...part of the process that wasn’t made in America...”– OH Dem female

“Then that’s not right.” – OH Dem female

“I would feel cheated.” – OH Dem female

“Yes, “assembled in America,” but they are bringing the parts from all the different components and they assemble it. I worked for Black and Decker and all of our tools said made in America but actually it was assembled in America, everything was made in Mexico, but then assembled here and we could put the stamp on it.” – OH Swing female

“I don’t know. If you got to buy one piece [outside the U.S.] but everything else is in America it doesn’t really make a difference if it says two percent overall of the automobile is from a different place. So it was assembled, the plant was ours, we built it here everything else and I don’t think you get a 100 percent in a lot of things.” – OH Swing female

“I think if it is a very low percentage [from outside U.S.] then it is okay, but if it is like 50 percent or something then it’s like okay, no.” – OH Swing female

“I think the lowest possible.” – OH Swing female





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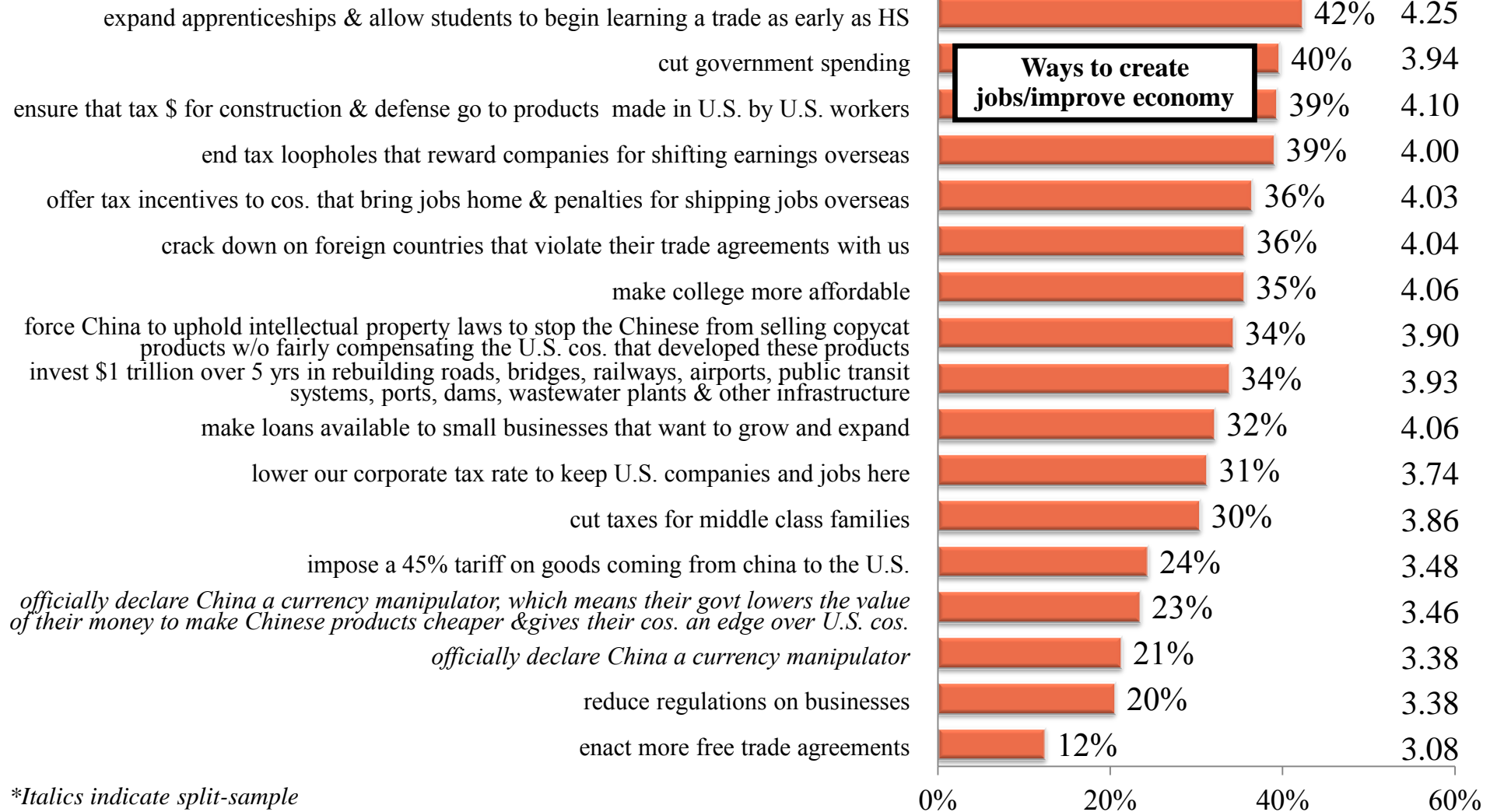


**Ohioans Favor An Array Of Pro-Manufacturing Steps Including Expanding Apprenticeships & Buying American When Taxpayers' Money Is Spent**



# Apprenticeships, Cutting Government Spending, Ensuring Tax Dollars Buy U.S. Products, And Tax Benefits For Onshoring & Penalties For Outsourcing Are All Seen As Quite Effective

Ranked by one of the most effective Mean  
(1-5 scale)



\*Italics indicate split-sample



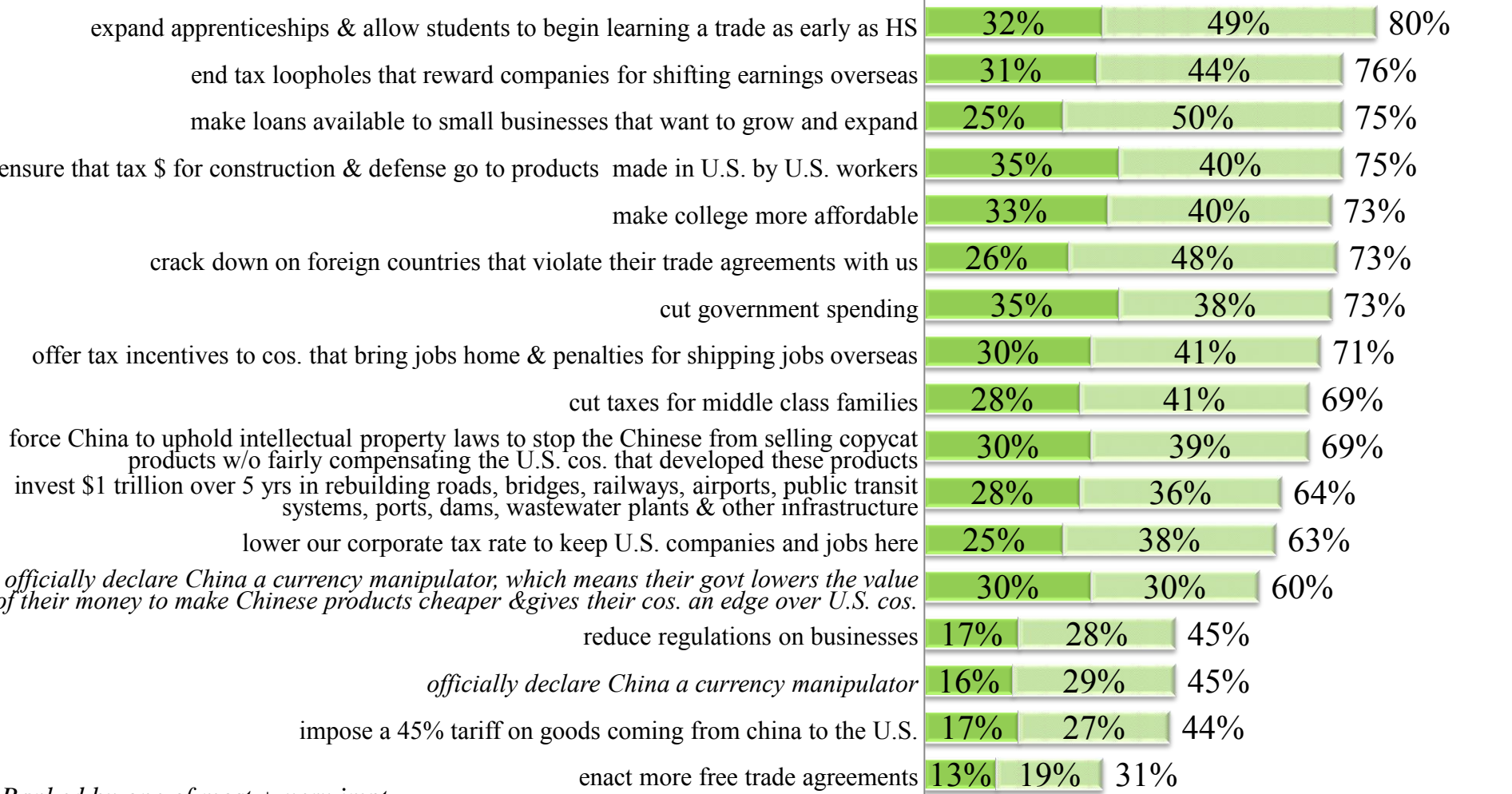
# Among Independents, Ending Loopholes For Companies Shifting Earnings Overseas Is Seen As Most Effective, While GOPers' Priority Is Cutting Government Spending

Ways to create jobs/improve the economy <i>(Ranked by most effective) *Battery was split-sampled</i>	Total	Dem	Ind	GOP
expand apprenticeships & allow students to begin learning a trade as early as HS	42%	46%	41%	40%
cut government spending	40%	30%	40%	48%
ensure that tax \$ for construction & defense go to products made in U.S. by U.S. workers	39%	35%	39%	44%
end tax loopholes that reward companies for shifting earnings overseas	39%	36%	46%	36%
offer tax incentives to cos. that bring jobs home & penalties for shipping jobs overseas	36%	34%	33%	42%
crack down on foreign countries that violate their trade agreements with us	36%	36%	34%	37%
make college more affordable	35%	47%	37%	24%
force China to uphold intellectual property laws to stop the Chinese from selling copycat products w/o fairly compensating the U.S. cos. that developed these products	34%	30%	38%	35%
invest \$1 trillion over 5 yrs in rebuilding roads, bridges, railways, airports, public transit systems, ports, dams, wastewater plants & other infrastructure	34%	43%	33%	26%
make loans available to small businesses that want to grow and expand	32%	33%	30%	33%
lower our corporate tax rate to keep U.S. companies and jobs here	31%	23%	34%	37%
cut taxes for middle class families	30%	37%	25%	28%
impose a 45% tariff on goods coming from china to the U.S.	24%	25%	27%	22%
<i>officially declare China a currency manipulator, which means their govt lowers the value of their money to make Chinese products cheaper &amp; gives their cos. an edge over U.S. cos.</i>	23%	18%	27%	26%
<i>officially declare China a currency manipulator</i>	21%	23%	18%	22%
reduce regulations on businesses	20%	15%	20%	26%
enact more free trade agreements	12%	15%	12%	11%



# Apprenticeships, Ending Tax Loopholes, Small Business Loans, Making College Affordable, Keeping Tax Dollars Here And Cutting Government Spending Are Seen As Legislative Priorities

*Now I'm going to list ways some people say we can create jobs and improve the economy. After each, please tell me whether you think that particular policy is one of the most important things for Congress and the President to work on, very important, somewhat important not too important, or not important at all.*



Ranked by one of most + very imp

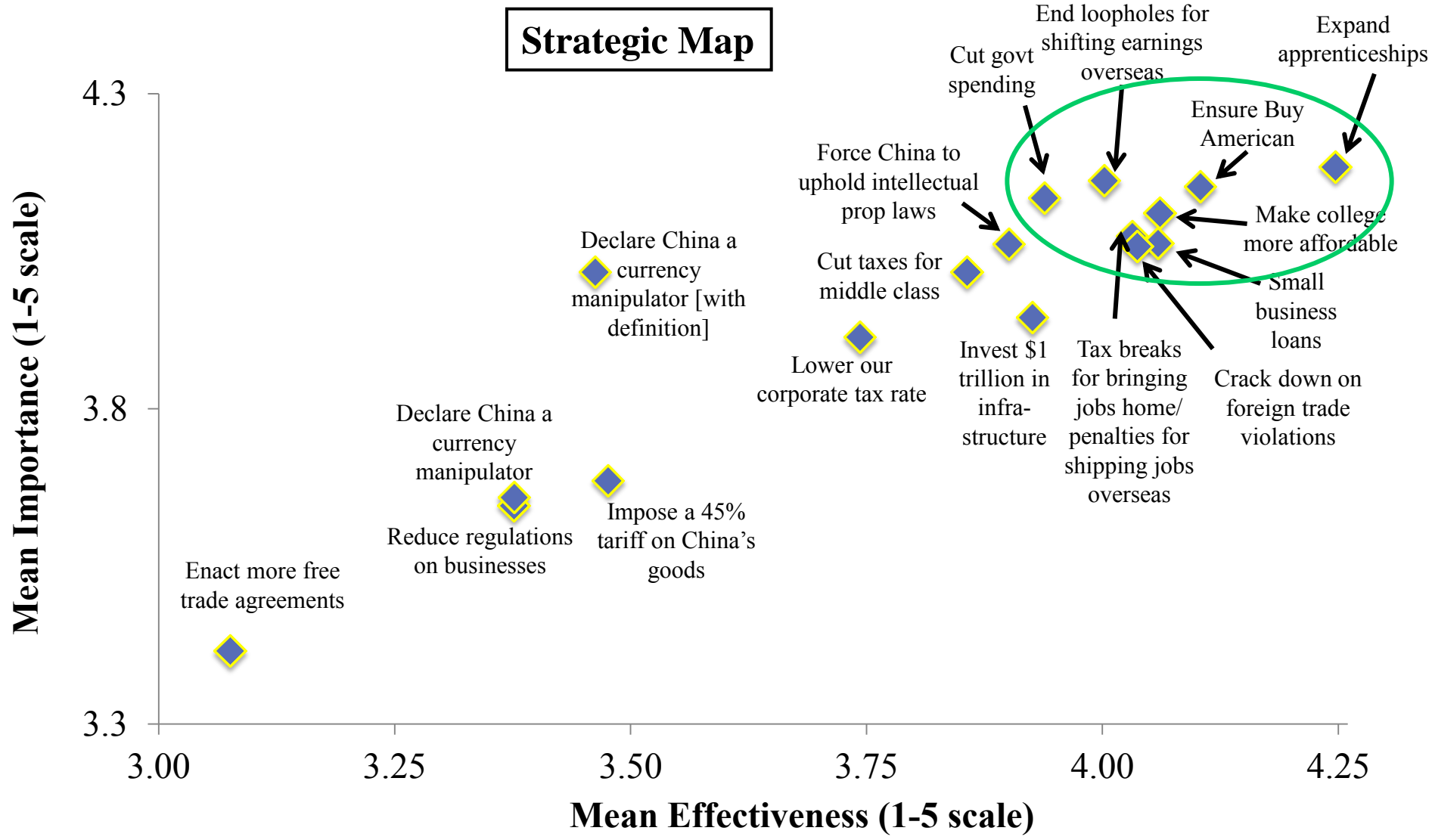
\*Italics indicate split-sample

# Increasing Access To Small Business Loans And Cutting Government Spending Are Top GOP Priorities, While Apprenticeships And College Affordability Are Important To Democrats

Ways to create jobs/improve the economy <i>(Ranked by one of most + very imp't) *Battery was split-sampled</i>	Total	Dem	Ind	GOP
expand apprenticeships & allow students to begin learning a trade as early as HS	80%	82%	83%	77%
end tax loopholes that reward companies for shifting earnings overseas	76%	75%	77%	75%
make loans available to small businesses that want to grow and expand	75%	73%	74%	79%
ensure that tax \$ for construction & defense go to products made in U.S. by U.S. workers	75%	80%	71%	75%
make college more affordable	73%	88%	70%	63%
crack down on foreign countries that violate their trade agreements with us	73%	73%	72%	74%
cut government spending	73%	61%	69%	86%
offer tax incentives to cos. that bring jobs home & penalties for shipping jobs overseas	71%	76%	72%	66%
cut taxes for middle class families	69%	76%	64%	67%
force China to uphold intellectual property laws to stop the Chinese from selling copycat products w/o fairly compensating the U.S. cos. that developed these products	69%	65%	67%	73%
invest \$1 trillion over 5 yrs in rebuilding roads, bridges, railways, airports, public transit systems, ports, dams, wastewater plants & other infrastructure	64%	80%	61%	52%
lower our corporate tax rate to keep U.S. companies and jobs here	63%	57%	61%	70%
<i>officially declare China a currency manipulator, which means their govt lowers the value of their money to make Chinese products cheaper &amp; gives their cos. an edge over U.S. cos.</i>	60%	58%	68%	58%
reduce regulations on businesses	45%	32%	46%	57%
<i>officially declare China a currency manipulator</i>	45%	50%	42%	42%
impose a 45% tariff on goods coming from china to the U.S.	44%	54%	41%	39%
enact more free trade agreements	31%	36%	33%	26%



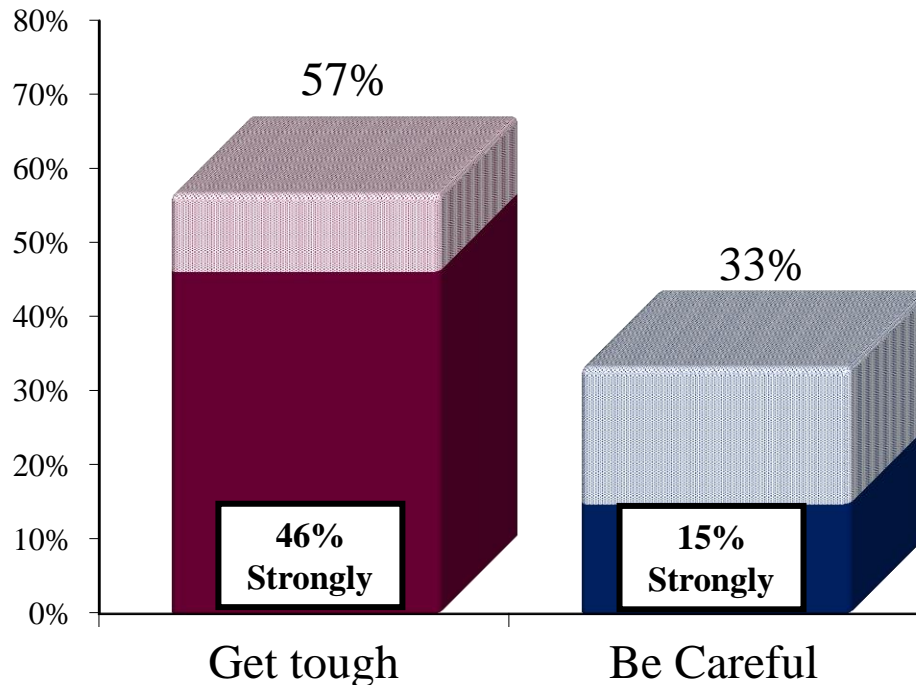
# Our Strategic Map Reveals Expanding Apprenticeships, Buy American Policies, College Affordability, Tax Policies That Encourage Onshoring, Loans To Small Business & Cutting Government Spending Are Judged Most Effective And Most Important



# Ohioans Favor Getting Tough With China, Even When The Risks Are Presented

*Which comes closer to your point of view?*

- We need to get tough with China and use every possible legal means to stop their unfair trade practices, including currency manipulation which will keep undermining our economy and taking away our jobs unless we get tough now.
- We don't want to start a trade war with China. Tariffs and trade wars led to the Great Depression and China is a huge market for American goods with three times more consumers than we have in America.



	Get Tough	Tread lightly
Democrat ID	53%	34%
Independent ID	53%	39%
Republican ID	63%	28%
Male	57%	34%
Female	57%	32%
Under 50	55%	37%
50+	58%	29%
High School or Less	59%	28%
Some College	60%	33%
College Grad+	54%	36%
Cleveland	56%	34%
Cincinnati	61%	29%
Columbus	54%	32%
Rest of State	56%	35%
White	58%	33%
Black	49%	36%
Non-white	53%	37%
Union Household	62%	28%
Non-Union Household	56%	34%
Manufacturing hhold	57%	33%
Non-Manuf hhold	57%	33%



# Infrastructure Investment Was Important To The Swing Voter Group

“Some bridges or highways and all these things that will fall apart here shortly from a manufacturing standpoint ...why don't we coordinate all of our resources for a ten year timeframe so we can build all ...build bridges, whatever it is. I am not an engineer, but what does it take to build the infrastructure back up to the 21st century? That to me would be the most logical way to promoting manufacturing right now. – OH swing male

“(In regards to government priority of infrastructure) It is going to have more cataclysmic events. Unfortunately we have it in Minneapolis with the bridge falling down and with other rail lines falling off tracks and something happens. To be honest, somebody who is very, very important in this political landscape and so something happens. I don't think anything will happen. – OH swing male

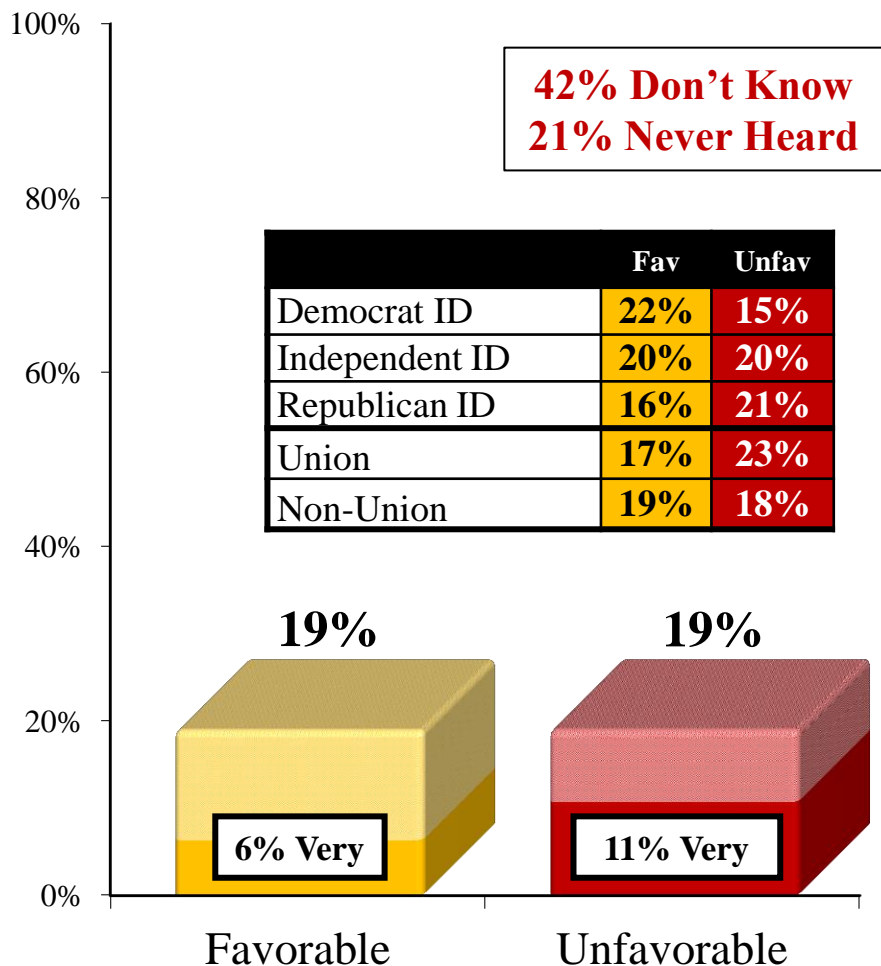
“I would like to see it number one, because I think it goes hand in hand with everything that we are talking about, manufacturing, we put people to work, we put products to work, it will all go hand in hand. We did a shuttle project when Obama came into office and we filled a bunch of potholes. That is basically what we did with the money that we got as states, because the states have the responsibility for repairing everything. That was nowhere near the money that is indicated here.” – OH swing male



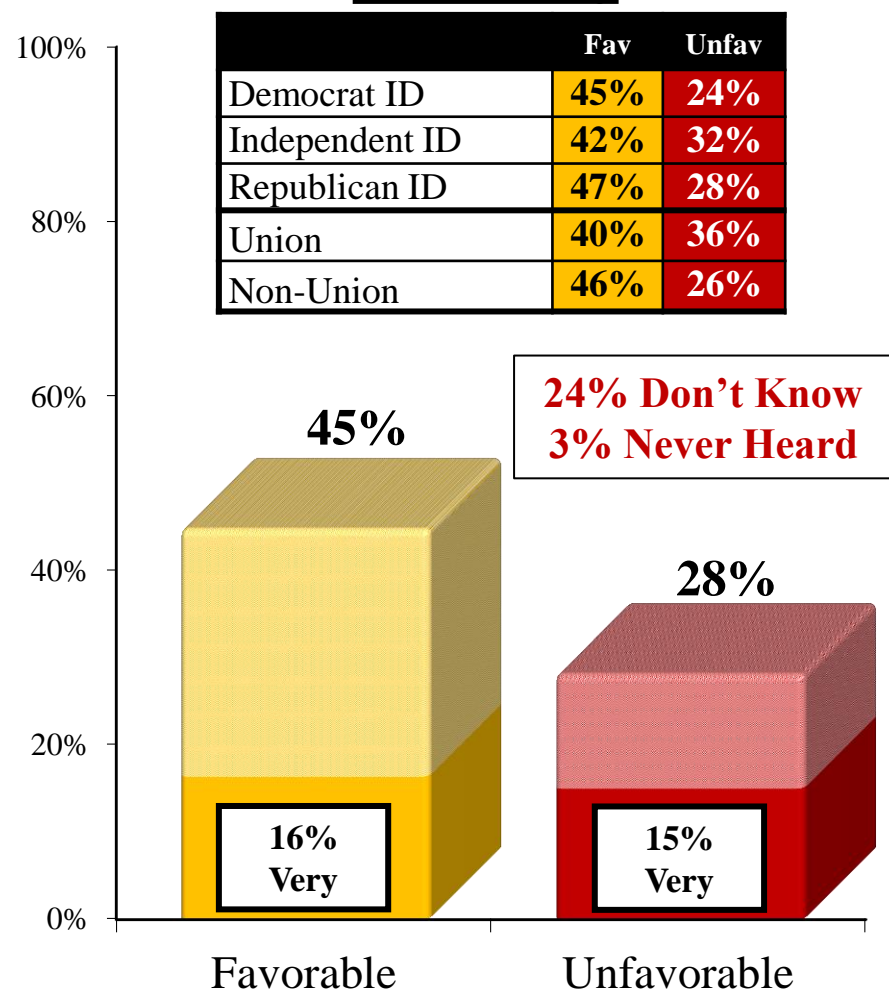


# Free Trade Agreements In General Are Seen Favorably, But Opinions Aren't Strong – And Only A Minority Hold An Opinion On TPP With Views Evenly Divided

## The Trans-Pacific Partnership, or TPP Favorability



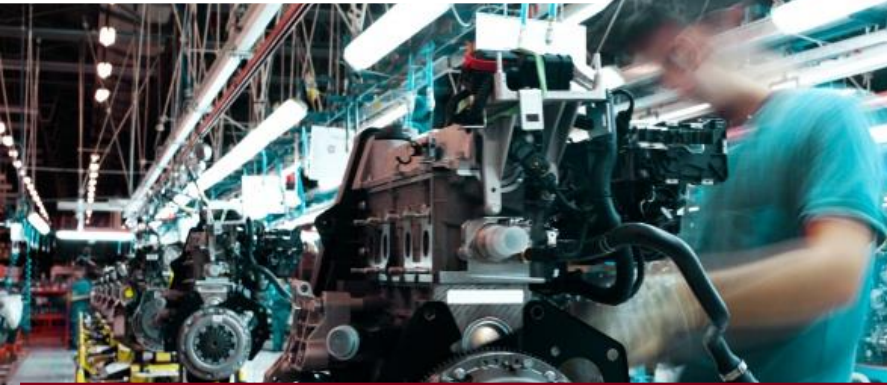
## Free Trade Agreements Favorability



\*Questions split-sampled



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**While Voters Don't Hear Candidates Discussing These Issues, Kasich & Trump Are Perceived As Strongest On Manufacturing And Trade**



# Voters Don't Hear Presidential Candidates Talking About These Issues

*Moderator: So do you think anyone in the presidential field on either side, do you think anyone cares about these things?*

“Well I think a couple of those who mentioned it, I don't remember any specifics...so they are talking generically that they would do something to address it, but they really haven't said what it is they may do. – OH swing male

“I don't remember really any talk, too much about this kind of stuff, they're mostly talking about terrorism and immigrants and going around and around.” – OH swing female

“I have not heard too much about that, and usually that is always a big thing with elections.” – OH swing female

“Yes, and the mass population is uneducated on the topics, so they might be saying things that we just don't know, like you can go, ‘free trade’ and I don't know what you are talking about. – OH swing male



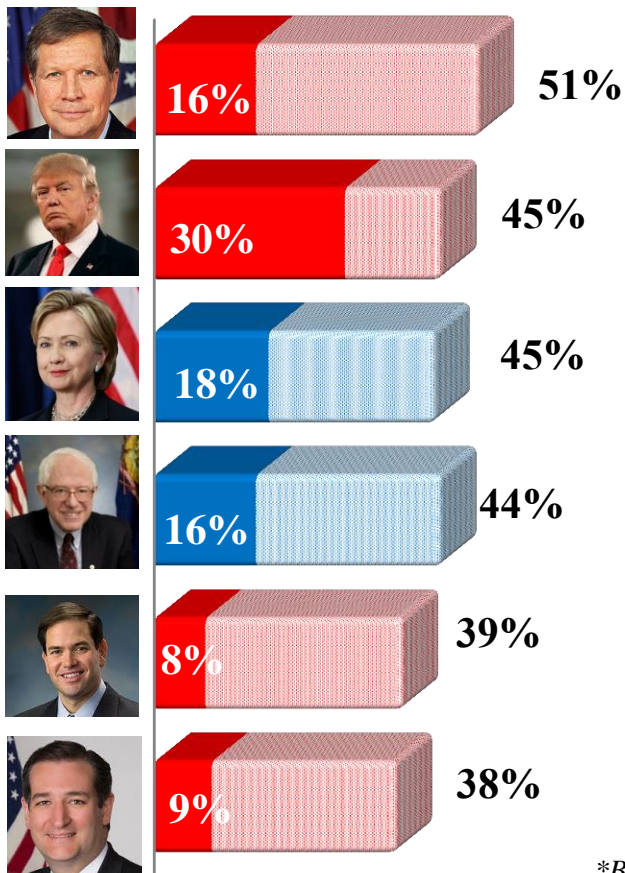
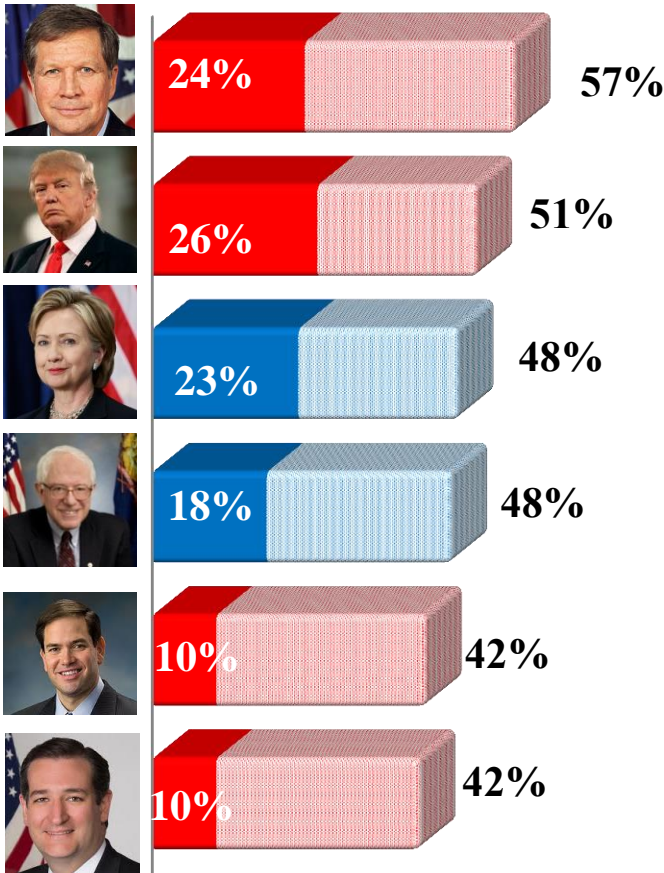
# Kasich Is The Candidate Most Likely To Do At Least Some Work On Creating Manufacturing Jobs/Enforcing Fair Trade, But Trump Is The Candidate Most Believe Will Do A Great Deal On Both

Do you think \_\_\_ will do a great deal as President to help create American manufacturing jobs, some, not too much, or nothing at all?

Do you think \_\_\_ will do a great deal as President to enforce fair trade with our trading partners, some, not too much, or nothing at all?

Percent helping great deal + some

Percent helping great deal + some



\*Batteries split-sampled

# Democrats Rate Clinton More Strongly Than Sanders

*Do you think \_\_\_ will do a great deal as President to help create American manufacturing jobs, some, not too much, or nothing at all?*

*Do you think \_\_\_ will do a great deal as President to enforce fair trade with our trading partners, some, not too much, or nothing at all?*

<b>Create U.S. Manuf Jobs</b> <i>(Ranked by great deal+some)</i>	<b>Total</b>	<b>Dem</b>	<b>Ind</b>	<b>GOP</b>
John Kasich	57%	37%	57%	76%
Donald Trump	51%	28%	54%	69%
Hillary Clinton	48%	83%	48%	16%
Bernie Sanders	48%	65%	52%	28%
Marco Rubio	42%	19%	36%	68%
Ted Cruz	42%	23%	38%	63%

<b>Enforce Fair Trade</b> <i>(Ranked by great deal+some)</i>	<b>Total</b>	<b>Dem</b>	<b>Ind</b>	<b>GOP</b>
John Kasich	51%	40%	51%	60%
Donald Trump	45%	20%	47%	67%
Hillary Clinton	45%	78%	43%	16%
Bernie Sanders	44%	62%	43%	29%
Marco Rubio	39%	23%	44%	49%
Ted Cruz	38%	18%	43%	52%



# Republicans Are Much More Intense About Trump's Handling Of Trade

*Do you think \_\_\_ will do a great deal as President to enforce fair trade with our trading partners, some, not too much, or nothing at all?*

<b>Enforce Fair Trade</b> <i>(Ranked by <u>great deal</u>)</i>	<b>Total</b>	<b>Dem</b>	<b>Ind</b>	<b>GOP</b>
Donald Trump	<b>30%</b>	8%	28%	<b>52%</b>
Hillary Clinton	<b>18%</b>	40%	12%	4%
Bernie Sanders	<b>16%</b>	24%	12%	10%
John Kasich	<b>16%</b>	6%	17%	23%
Ted Cruz	<b>9%</b>	4%	9%	14%
Marco Rubio	<b>8%</b>	5%	8%	12%



# Trump Came Up Most Frequently As The Candidate Who Would Be Best On These Issues

“...Trump likes to talk about the difference between us and China and China is taking advantage of us, we trade with them but their tariff or whatever you want to call it is different than ours and they found a way to take advantage of us. And so that is kind of what I thought about it. – OH swing male

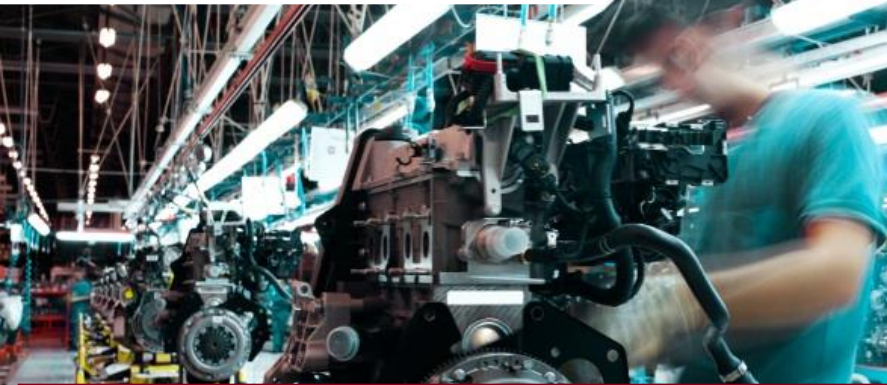
“[Trump is best] because (Trump) will get the job done. He would not be screwing around waiting five years to put a bridge up; he would say get it done. I was driving here tonight and I heard one of his planes being retrofitted for like the press or something like that and it would normally take like ten days, it took five hours. So I am drawing the analogy that infrastructure we wouldn't be talking about this in ten years, we would be making substantial progress.” – OH swing male

“Just the fact that (Trump) is a businessman. It just kind of makes sense if you want to build American's infrastructure and economy then maybe just give a businessman a shot.” –OH GOP male

“I've heard Trump say that he is going to make China bend over and kiss our ass or something. [Laughter] “– OH Dem male



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# Candidates' Manufacturing Messages Hit Home With Ohioans

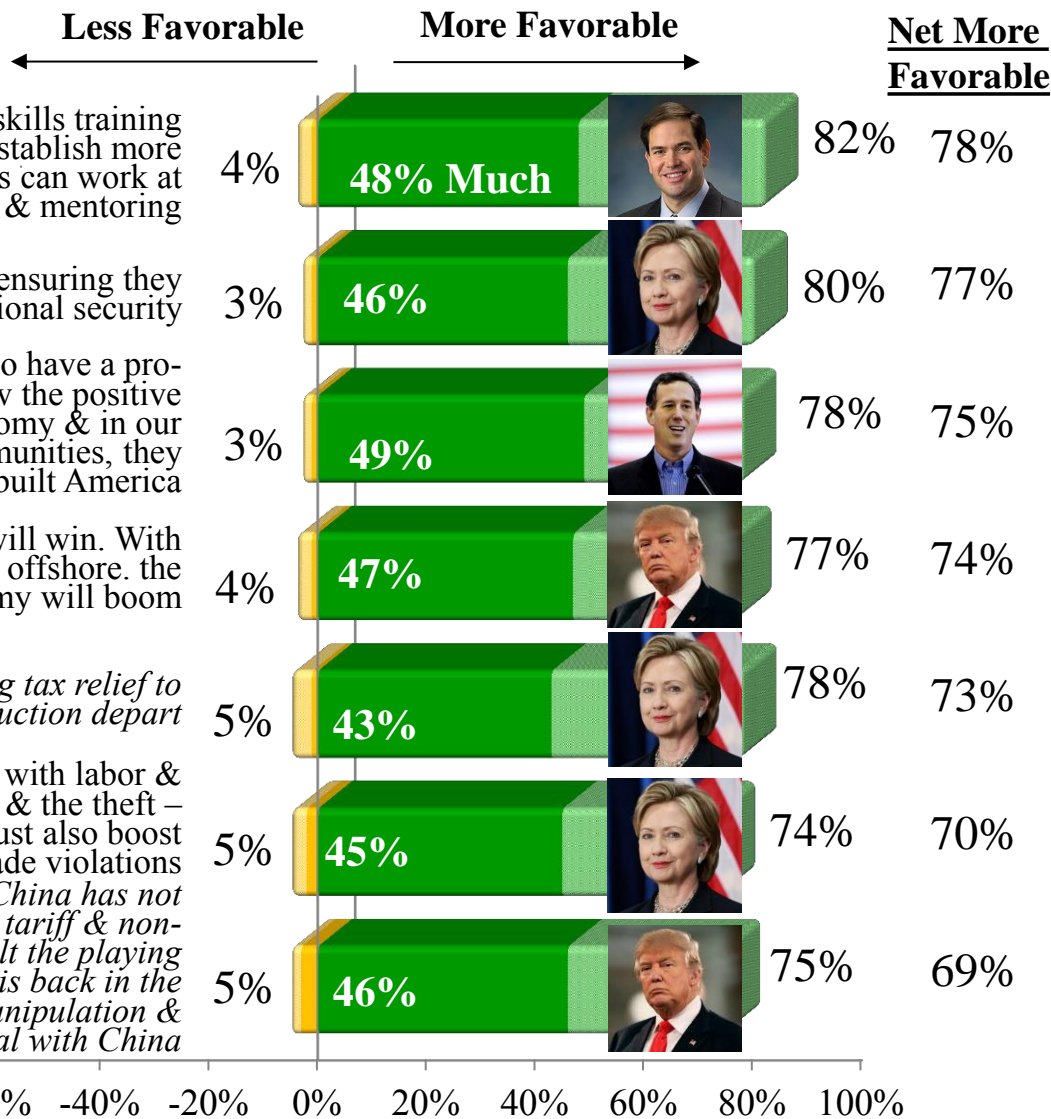




# A Vocational President, Setting A High Bar For Trade Agreements, Leveling The Playing Field, And A Pro-Growth Agenda Are All Successful Messages

## Candidate Statements

Ranked by net more favorable



\*Italics Indicate Split Sample



# The Second Tier Of Candidate Statements All Move A Majority To Feel More Favorably

## Candidate Statements

Ranked by net more favorable

← Less Favorable

More Favorable →

Net More Favorable

*My plan would make areas that have seen or are about to face significant manufacturing job or plant losses eligible for new investment tax incentives to attract new capital, business, and jobs, a zero capital gains option on long-term investments, and relief for renovating, refurbishing, or repurposing plants*

5%

35% Much



71%

67%

*With the right President, China will be on notice that America is back in the global leadership business and that their days of currency manipulation & cheating are over. No more sweatshops or pollution havens stealing jobs from American workers*

5%

48%



71%

66%

For free trade to bring prosperity to America, it must also be fair trade. our goal is not protectionism but accountability

4%

35%



70%

66%

Today, we rely on a higher educ system that looks down its nose at skilled trades. It tells our kids if they grow up to work with their hands instead of a computer they're less accomplished. We need a President with the courage to change this perception

9%

47%



73%

65%

In the 21st century, we don't want to be known for manufacturing toothbrushes and toys, we want to be known for manufacturing the rockets of SpaceX or the next big thing in consumer electronics

9%

42%



71%

63%

We must also negotiate free trade agreements with the goal of expanding access to foreign markets for American products and services

10%

36%



69%

59%

-100% -80% -60% -40% -20% 0% 20% 40% 60% 80% 100%

\*Italics Indicate Split Sample



THE MELLMAN GROUP



PUBLIC OPINION STRATEGIES

50

# Rubio's Focus On Vocational Training Resonated Across Party Lines

“Really in high school having programs where kids can go in and do something that would be good, instead of going to gym class or some of these other stupid classes that high schoolers have to go to, that really doesn't help them in any way. So I think that would be good, to have something like that that is building skills, even if that is not their career choice.” – OH swing female

“Redefining success to be college and career ready. College isn't for everybody. I have seen it every day when we try to shove a square peg in a round hole. I think it is to the detriment of many kids, we try to get them to college and that's what schools trumpet, the college admission numbers but college graduation numbers I think tell a different story. I think we do a disservice to so many kids not even presenting that as an option. I think they should be given the option, I think it should be sold to them and I think those options should be laid out. You have this career path that you are clearly entitled to take and you can leave high school ready to be a skilled worker, productive.” - OH Dem female

“I circled the education system part of this and the skilled trades. I believe that if you want cohesiveness you need to have both the higher educated, and more computer people working together with people who have hands-on abilities as well.” – OH GOP male



# Clinton's Focus On Revitalizing Hard Hit Communities Received Mixed Reactions

“I was kind of on the fence about it, because it seems like I don't know like a bailout type deal where the companies have been screwing up and we keep bailing them out and they aren't learning anything or is it just more of just to help the communities.” – OH Swing female

“I circled renovating, refurbishing, and repurposing [as positive]. I hate driving by someplace and seeing something empty. It kind of hurts to see a plant empty and people are not working. Why? It hurts.” – OH GOP male

“Well you would not be hearing this in Silicon Valley, you wouldn't. Why be so microscopic in approach. If you are going to take this within Southeast Ohio yes, it is going to ring pretty true, but if you are going to take this to Silicon Valley...I just think sometimes when somebody speaks they are obviously speaking to their audience. So if this person is going to get up and speak to this point they need to broaden it a little bit, but I also understand they are speaking to a specific audience.” – OH swing male

“I was in the middle...because of one thing in there. I just think it is going to be government run. It is going to take control. Our government is messed up so much that to me that scares me. Other than that I liked it.” – OH GOP male



# Tough Talk On China Does Well With Republicans, While Job Training And Fighting For Manufacturing Workers Is Strong Among Democrats

Top Candidate Statements <i>(Ranked by net more favorable) *Italics indicate split-sample</i>	Total	Dem	Ind	GOP
<b>Rubio:</b> I will be the vocational education President. I will make skills training more widespread, more accessible, more affordable & establish more programs like GE's.	78%	78%	79%	77%
<b>Clinton:</b> As President, I will set a high bar for trade agreements, ensuring they create good U.S. jobs, raise wages, and advance our national security.	77%	75%	74%	82%
<b>Santorum:</b> We need a pro-growth economic agenda and a pro-worker economic agenda. I grew up around manuf., & know the positive impact manuf. jobs have.	75%	79%	70%	75%
<b>Trump:</b> If you give American workers a level playing field, they will win. With the right actions, jobs and factories will stop moving offshore. the economy will boom.	74%	76%	71%	74%
<b>Clinton:</b> <i>We must revitalize hard-hit manuf. communities by providing tax relief to encourage investment in areas that have seen jobs &amp; production depart.</i>	73%	73%	64%	81%
<b>Clinton:</b> We must crack down on currency manipulation & work with labor & business to take tough actions against unfair trade practices & the theft of America's inventions.	70%	68%	64%	76%
<b>Trump:</b> <i>America fully opened its markets to China but China has not reciprocated. Its Great Wall of Protectionism uses unlawful tariff &amp; non-tariff barriers to keep our companies out of China &amp; tilt the playing field. China will be on notice that ...their days of currency manipulation &amp; cheating are over. We will cut a better deal with China.</i>	69%	61%	62%	81%
<b>Clinton:</b> <i>My plan would make areas that have seen major manuf. losses eligible for new tax incentives to attract new capital, business, &amp; jobs, &amp; relief for renovating plants</i>	67%	67%	63%	70%
<b>Trump:</b> <i>With the right President, China will be on notice that ...their days of currency manipulation &amp; cheating are over. No more sweatshops or pollution havens stealing jobs</i>	66%	69%	61%	68%
<b>Trump:</b> For free trade to bring prosperity to America, it must also be fair trade. Our goal is not protectionism but accountability	66%	65%	69%	64%
<b>Rubio:</b> Today, we rely on a higher educ system that looks down its nose at skilled trades. It tells our kids if they work with their hands instead of computers they're less accomplished.	65%	67%	60%	66%
<b>Rubio:</b> In the 21st century, we don't want to be known for manufacturing toothbrushes and toys, we want to be known for manufacturing the rockets of SpaceX	63%	65%	61%	63%
<b>Santorum:</b> We must also negotiate free trade agreements with the goal of expanding access to foreign markets for American products and services	59%	61%	61%	55%



# Strategic Conclusions

- **Ohioans see manufacturing as central to our economic strength**
- **They see it in decline, importantly because of jobs being sent overseas**
- **Voters want to see the threat from China addressed**
- **Apprenticeships, a renewed focus on vocational education, ending tax policies that reward companies for shifting earnings overseas, loans for small business and spending taxpayers' money at home all garner strong, bipartisan support as ways to revitalize manufacturing**
- **Ohioans say they are not hearing much about these issues though Trump has begun to break through**
- **Generally all the candidates have persuasive language on these issues – but Trump has found a way to discuss them issues in ways that are memorable and understandable**





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