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MEMORANDUM

TO: Virginia Chamber of Commerce
FROM: B.J. Martino
DATE: October 18, 2016
RE: Key Findings From A Survey of Voters in Virginia

The Tarrance Group is pleased to present the Virginia Chamber of Commerce with the key findings from a survey of voter attitudes in the Commonwealth of Virginia. These key findings are based on telephone interviews with N=500 Registered “likely” voters in each state. Responses to this survey were gathered October 12-15, 2016 and the margin of error associated with a sample of this type is $\pm 4.1\%$ in 95 out of 100 cases.

OVERVIEW

- A 53% majority say Virginia’s economy is going in the right direction.
- At the same time, only 39% say the country’s economy is going in the right direction.
- On the issue matrix, education and workforce training is selected most frequently at 25% Health care at 18%, transportation at 17%, and business climate at 16%. Other issues in the single digits.
- In the 2016 race for President, Trump is down 9-points, 38% to 47%, against Clinton.
- Fully 69% of voters support Virginia’s Right to Work law as described
- A 55% majority would vote for making it a constitutional amendment.
- A 55% majority of Virginia voters support the Atlantic Coast Pipeline as described.
- 46% support the Redskins moving to Virginia, with only 21% opposed.
- However, only 23% support tax incentives for them to make the move.
- Given some background, 59% of voters support expanding trade, 27% restricting it.
- However, only 37% of Virginia voters support TPP, and 45% oppose.

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KEY FINDINGS

Direction of the Economy: State and Country

► Fifty-three percent (53%) of voters in Virginia say the state’s economy is going in the right direction, while 38% say things are off on the wrong track.

Intensity of opinion is more evenly split, with 27% feeling strongly that things are right direction, and 28% strongly wrong track.

Regionally, voters in the Washington DC media market are among the most positive, hitting 63% right direction. Those numbers drop to 44% on the Roanoke DMA, and 40% in the smaller southwestern markets.

Republicans are nearly 2:1 negative, with 33% right direction and 59% wrong track. Independents are more evenly split, 44% to 40%, while Democrats are fully 74% right direction.

► While more positive about Virginia, voters here are less optimistic about the national economy, with only 39% saying the country’s economy is going in the right direction, and 55% headed down the wrong track.

Here, the intensity of the negatives outweigh the positives by 2:1, with only 22% strongly right direction and 45% strongly wrong track.

Northern Virginia voters are still more positive, with a 51% majority saying right direction, and Roanoke and smaller markets more negative as with the state results. Norfolk DMA voters are only 33% right direction and 64% wrong direction, one of the biggest differences between the state and country results.

All told, 35% of voters consistently say things are right direction, and 35% consistently wrong track. Washington DC DMA voters are more likely to be consistently positive, while Richmond and Roanoke DMA voters more consistently negative.

Direction of Economy Comparison by DMA and Party Identification

DMA	State	Country	Consistent Right	State Only	Consistent Wrong
DC	63%	51%	49%	14%	23%
Norfolk	50%	33%	25%	25%	35%
Richmond	49%	39%	38%	12%	42%
Roanoke	44%	26%	23%	21%	49%
Other	40%	22%	20%	20%	53%
Republican	33%	9%	7%	26%	57%
Independent	44%	35%	33%	11%	38%
Democrat	74%	66%	61%	13%	15%

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Issue Matrix

Provided a list of seven issues, a quarter (25%) selected “education and workforce training” as the most important for improving in Virginia. Health care registered second at 19%, closely followed by transportation and infrastructure are 17%, and the business climate and economic development at 16%. Dropping to the single digits are “military and veterans affairs” at 9%, environmental issues at 4%, and energy at 4%. There are clear regional, partisan, racial, age and gender differences at work.

Education and workforce training is more important in the Richmond DMA (33%), as well as among women (30%), voters 18-44 (35%), African American voters (34%), other minorities (28%), and Democrats generally (35%, especially female and younger).

Health care climbs in the North Hampton Roads/Chesapeake Bay region (24%), as well as among male Democrats (24%).

Transportation, not surprisingly, is a big issue in the Washington DC media market at 26%, up to 29% in the Fairfax county region, and is slightly more important among older men (21%), male Republicans (23%), male Independents (24%), and older independents (22%).

Business climate and economic development hits 22% in the Roanoke DMA, as well as in the smaller southwestern markets, also climbing to 22% among men under age 55, and up to 25% among Republicans generally (higher among male and younger Republicans).

Military and veterans issues reaches 17% in the Norfolk DMA, 20% in South Hampton Roads (where it essentially matches transportation at 21%).

Presidential Ballot

Donald Trump is down nine points to Hillary Clinton on the Presidential ballot, 38% Trump, 47% Clinton, with 3% voting for Gary Johnson, 2% for Evan McMullin, and less than 1% for Jill Stein. Nine percent (9%) are still undecided. This 9-point advantage for Clinton holds in intensity, with 32% definitely for Trump and 41% definitely for Clinton.

Trump’s only significant lead comes from voters in the Roanoke media market, where he leads 53% to 39%. That 15-point lead is not enough to make up for the 27-point deficit in the Washington DC market, where only 30% are for him, and 57% for Clinton.

He pulls to even with men generally, 42% apiece, but is 15-points down among women. Older men (age 55+) climb to 46% Trump to 38% Clinton, but he is losing younger men and women of all ages.

While 80% of voters who identify as Republicans support Trump, Clinton has 89% of Democratic support. At the same time, Trump is within 2-points of Clinton among independent voters, 31% to 33%. The age and gender effects are at work within the independent voters.

Trump has 46% among white voters, with 38% for Clinton. Sixteen percent (16%) of African-Americans say they would vote Trump, as would 28% of other minorities.

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Right to Work

► Sixty-nine percent (69%) of voters support the state's Right to Work law, described as "meaning it protects workers from being forced to join a union as a condition of employment." Only 23% oppose the law as described. Big intensity behind Right to Work, with 49% strongly supporting.

Support for Right to Work stays at or above 65% regardless of media market. Support climbs to 83% of Republicans in Virginia, as well as 65% of independent voters. Democrats support the law as described nearly 2:1, with 59% support and 31% oppose.

Female support for right to work is strong, with a 4:1 ratio of 72% support and 18% oppose.

► When asked if they would vote for making Right to Work part of the state constitution, support drops to 55% saying they would vote for it, and 32% would vote against. Thirteen percent (13%) are left unsure, a group on ballot initiative tend to default to voting no or against if forced to. Intensity of those voting for is still higher than opposition, with 36% strongly for and 22% strongly against.

Support for an amendment retains a majority across regions, slipping to a minimal 51% in the Washington DC market. Seniors slip to 49% support, while younger voters stay above the 50% line.

Bigger partisan differences here, with 70% of Republicans saying they would vote for, with independents and Democrats dropping to 46% voting for.

Overall 19% of voters say they support Right to Work but would not vote to make it an amendment, including 24% of independent voters.

Atlantic Coast Pipeline

► Voters were read the following description: "there is a proposal to build an underground natural gas pipeline called the Atlantic Coast Pipeline. The pipeline would bring domestically produced natural gas to families and businesses in Virginia and North Carolina to meet energy and electricity needs. The pipeline would begin in West Virginia, travel across Virginia, and end in Eastern North Carolina."

Knowing this, a 55% majority support the Atlantic Coast Pipeline Project, while only 29% opposed, and 16% unsure. Support intensity is nearly 2:1 as great as opposition, with 35% strongly supporting, and 19% strongly opposed.

There is less difference by the media markets, with voters in the Washington DC market at 54% support, and climbing to 58% in the Norfolk DMA. Richmond DMA and Roanoke DMA voters hold at 56% and 57% support respectively, and the rest of the state at a 51% majority as well.

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Washington Redskins

► A 46% plurality of voters in Virginia would support the Redskins moving from Fed Ex Field in Maryland to a new stadium in northern Virginia, while 21% say they would oppose. Fully 34% are unsure or simply indifferent. Only 25% strongly support, and 14% strongly oppose.

Regionally, the strongest support comes from voters in the Richmond media market, with 54% saying they support and only 19% oppose. In the DC DMA, only a 44% plurality support and 24% oppose.

A 54% majority of Republicans support, as do 45% of Democrats, but only 32% of independents (with 24% oppose and a 43% plurality unsure). There is a gender gap that runs through the data, within all three partisan groups. Men are more supportive of the Redskins moving than are women overall and within the three partisan groups. Fifty-percent (50%) of men support overall (22% oppose), while 42% of women support (16% oppose and 40% unsure).

► Voters were then informed “As you may know, many professional football franchises receive state tax incentives to support construction of new stadiums. Some people say Virginia should provide the Washington Redskins a tax incentive to move to a new stadium in Virginia, while others say we should not.”

When offered this statement, only 23% say they would support providing the tax incentive, while a 68% supermajority say they would oppose. Only 11% remain strongly supportive, while a 52% majority strongly oppose.

This support drops to the teens (18%) in the DC market, but is up to 27% in the Richmond DMA and 31% in the Roanoke DMA.

Men lose their enthusiasm gap over women, with only 24% of men in support of tax incentives, compared to 22% of women. Republicans drop to 27% support, Democrats to 22%, and independents to 17%.

Thirty-two percent (32%) of African-American voters support, compared to 21% of white voters.

Trade and TPP

► Provided the statement that “exports of goods and services from Virginia support three hundred twenty thousand jobs in the state, and account for 30 percent of our economic growth in recent years. At the same time, some people say we should restrict trade with other countries,” a 59% majority say they would like trade to expand, while 27% would like to see it restricted. Fourteen percent (14%) are unsure or want no change.

Support for expanding trade hits 66% in Washington DC’s media market, and 62% in the Richmond DMA, dropping to 51% in the Norfolk DMA (where the restrict score climbs to 34%). The support for expanding trade also closes in the Roanoke DMA, with 57% for expanding, and 33% for restricting.

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Men are generally more likely to be for expanding trade, with 68% expand and 22% restrict. Women are down to 52% expand and 31% restrict.

Fully 70% of Democrats support expanding trade, and only 20% for restricting trade. 63% of independents agree with the vast majority of Democrats, and only 17% for restricting. Republicans, however, are more divided, with 44% for expanding and 40% restricting.

► Asked specifically about the Trans-Pacific Partnership, only 37% of Virginia voters support that trade deal, while 45% oppose, and 19% are left unsure. Intensity of opposition is nearly 2:1, with 15% strongly supporting and 29% strongly opposed.

The only region in which there is net support for TPP is the DC DMA, with 44% support and 36% oppose.

Men drop significantly from their previous support for expanding trade, to only 38% for TPP and 47% opposed. While younger voters are slightly more supportive, 46% support to 40% oppose.

Negativity towards TPP is largest among Republicans, with only 27% support and 56% oppose, higher opposition among older men. Democrats are net positive, 48% support TPP and 35% oppose. Independents net negative, 31% support to 43% oppose.

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