

Note to Presidential Nominees: What Florida Voters Care About

By Lynne Holt

As the presidential election on November 8 rapidly approaches, we might wonder what issues are most important to Florida voters. We might also wonder how, if at all, these issues have changed in importance to Florida's voters from April through September of 2016, when the general election campaigns were ramping up. This paper provides a snapshot of registered voters' responses to questions in both months using survey data collected by the UF Survey Research Center (UFSRC) at the Bureau of Economic and Business Research, University of Florida.

Every month the UFSRC surveys Floridians to assess their attitudes toward the economy. These surveys make use of socio-economic and demographic data to identify and analyze the level of consumer confidence. In partnership with the Bob Graham Center, UFSRC added six questions to its April and September surveys to elicit responses about public policy issues that might inform respondents' choices of presidential candidate in the November 2016 election. Although UFSRC consumer sentiment surveys poll Floridians 18 years and older, the respondents are not necessarily voters. However, survey respondents are asked whether they are registered to vote. Roughly 80% of those surveyed in April (394 of 502) and September (411 of 501) responded that they were registered to vote. This set of 805 survey respondents who self-identified as being registered to vote forms the basis for the analysis below. For purposes of this paper, these registered voters are referred to as "voters" even though they may not turn out to vote in the upcoming presidential election.

At the Bob Graham Center's request, UFSRC added several survey questions aimed at identifying the issues that mattered to Florida's voters as the presidential campaigns unfolded. Five questions posed in April and September probed the level of importance that voters attached to each of five policy issues: the economy, health care, immigration issues, tax policy, and threat of terrorism. These options were randomized to eliminate any effect from the order in which they were presented.

The sixth added question was: which of these is the single most important issue in your choice of the president? Is it: the economy, health care, immigration issues, tax policy, and threat of terrorism? Voters could offer other responses, notated as "something else," although no follow-up questions were asked for them to expand on such responses.

As shown in Table 1, the economy was identified as the most important issue in both April and September by a significant margin. The economy was followed by a concern for health care and the threat of terrorism in almost the same proportions, then immigration and finally tax policy. A small portion of voter respondents to each survey refused to answer or responded they did not know or that another issue was most important to them.

Table 1
Which of these is the Single MOST Important Issue in Your Choice of President?

POLICY	April 2016	April 2016 %	September 2016	September 2016 %
Economy	188	48	164	40
Health Care	67	17	73	18
Immigration	37	9	44	11
Tax Policy	23	6	22	5
Threat of Terrorism	58	15	78	19
Something Else	10	2	18	4
Refused/Don't Know	11	3	12	3
Total	394	100%	411	100%

The Economy

The economy is routinely cited as the most important issue in polls that attempt to capture the importance voters place on issues in informing their decisions about presidential candidates. For example, a CBS News/New York Times Poll conducted September 9-13, 2016 asked registered voters: “In deciding who you would like to see elected president this year, which one of the following issues will be most important to you: national security and terrorism, the economy and jobs, health care, immigration, or something else?” Of 1,433 registered voters, 32% responded “economy and jobs,” followed by national security (29%), health care (16%), immigration (8%), and something else (9%). A poll by ABC News/Washington Post of 1,002 adults (not necessarily registered voters) posed a similar question on September 5-8, 2016, and, once again, economy and jobs took first place (35%), followed by terrorism, national security (19%), and several other issues in descending order of priority.¹

Nearly half the voter respondents to the UFSRC survey identified the economy as the most important issue in April. The number of voters primarily concerned about the economy fell off slightly in September, but in both surveys, more than twice as many respondents were concerned about the economy than about the next most concerning issue, threat of terrorism. (See Table 1.)

Whether or not voters listed the economy as the most important factor among the five policy options informing their presidential choice, a significant majority (over 80% in both April and September) responded that it was an “extremely important” or “very important” factor in their decision. (This response was made to another question specifically about the relative importance of the economy to the choice of president. That finding is not included in any tables in this document.)

UFSRC routinely poses five questions in each of its monthly consumer confidence surveys to gauge the level of and changes in consumer attitudes. The respondent pool differs with each survey. One of the questions asked is: “We are interested in how people are getting along financially these days. Would you say that you (and your family living there) are better off or worse financially than a year ago?” Responses

¹ See PollingReport.com at <http://www.pollingreport.com/prioriti.htm>.

to that question provide some insight regarding voters’ perceptions of well-being relative to the importance they place on the economy as an issue in their choice of president.

Table 2
Personal Financial Situation –
Voters Identifying Economy as Most Important Issue

Current personal financial situation relative to a year ago	April 2016 (N=394)	April 2016 Economy most important issue	September 2016 (N=411)	September 2016 Economy most important issue
Better off	32%	48%	33%	45%
Same	41%	48%	40%	36%
Worse off	26%	48%	26%	41%
Refused/Don't Know	1%		1%	
Total	100%		100%	

On the whole, consumer confidence as measured by UFSRC was only slightly higher in September than in April based on the five metrics that are used to assess changes in consumer sentiment.² Correspondingly, voters’ responses characterizing their personal financial situations stayed pretty much the same in April as in September, as shown in Table 2 above.

Forty-eight percent of voter respondents in April in each of the relative financial well-being categories -- better off than, the same as, or worse off than a year ago -- identified the economy as the most important issue for their presidential choices. By September, the voters who thought their financial situation had improved in the past year were slightly less likely to cite the economy as the most important issue.

Of those voters who thought their financial situation was the same this year as last year, 12% fewer cited the economy as the most important issue in their choice of president in September as compared to April. The attention of voters surveyed in September with that perspective of their financial situation shifted to the threat of terrorism as the most important issue informing their decision for president, 24% compared to 12% in April. (This finding is not included in any table in this document.)

A somewhat smaller percentage of voters who thought their financial situation was worse this year than last year reported in September that the economy was their chief issue (41%) than did similarly situated respondents in April (48%). Health care gained the attention of this subset of respondents in September. In April only 4% of those self-identified ‘worse off’ respondents named health care as the most important presidential campaign issue compared to 19% in September. (This finding is not included in any table in this document.)

² The methodology is explained at Bureau of Economic and Business Research, University of Florida, September 30, 2016, https://www.bebr.ufl.edu/sites/default/files/csi/csi_2016_30_sep.pdf.

A Few Words about Immigration....

Immigration, despite the widespread discussion of illegal immigration during the primary and general election campaigns, was not considered in the top three of the five policy issues of greatest importance to survey respondents. That finding is consistent with other polls such as one conducted by the Pew Research Center which also found that a higher percentage of registered voters identified the economy, terrorism, and health care as more important than immigration for the choice of president.³ In the recent national polls that asked a similar question, CBS News/New York Times Poll (September 9-13, 2016) and the ABC News/Washington Post Poll (September 5-8, 2016), immigration lagged behind the economy, terrorism, and health care (CBS/New York Times) in terms of the percentage of respondents who thought it was the most important issue.

Party Affiliation and Most Important Issues in Presidential Choice

When the survey results are categorized based on the self-declared party affiliation of the voters, significant differences in the importance of issues are apparent as shown in Tables 3 and 4. In the April survey, 111 respondents were Democrats, 142 were Republicans, 119 were Independents, 5 were from some other party, 6 indicated no preference, and 11 professed not to know or did not respond. Respondents in September comprised 124 Democrats, 133 Republicans, 125 Independents, 9 members of another party, 10 individuals who claimed no party preference, and 10 who replied they did not know or refused to respond. Only the responses by those who self-identified as Democrats, Republicans, and Independents are addressed below.

Table 3
Most Important Issue Informing Decision for President
Responses by Major Party Affiliation
April 2016

Policy	Democrat (N. 111)	Republican (N. 142)	Independent (N. 119)
Economy	53%	46%	44%
Health Care	26%	6%	24%
Immigration	3%	15%	7%
Tax Policy	6%	6%	7%
Threat of Terrorism	12%	22%	12%
Something Else/RF/DK	1%	5%	6%
Total	100%	100%	100%

³ Pew Research Center, "Top Voting Issues in 2016 Election," July 7, 2016, <http://www.people-press.org/2016/07/07/4-top-voting-issues-in-2016-election>. These voters were given more options than were respondents in UFSRC's surveys and the Pew Research Center's survey options excluded tax policy.

Table 4
Most Important Issue Informing Decision for President
Responses by Major Party Affiliation
September 2016

Policy	Democrat (N. 124)	Republican (N. 133)	Independent (N. 125)
Economy	43%	38%	41%
Health Care	24%	9%	19%
Immigration	9%	18%	6%
Tax Policy	6%	5%	6%
Threat of Terrorism	11%	24%	22%
Something Else/RF/DK	7%	6%	6%
Total	100%	100%	100%

An analysis of the responses as reflected in Tables 3 and 4 show that the economy was the most important issue regardless of respondents' party affiliation (Democrat, Independent, or Republican). The decline in concern about the economy from April to September also showed up in responses across the party affiliation spectrum.

By contrast, health care tends to be an issue Democratic voters think is more important than do their Republican counterparts. Health care is an issue that seems to resonate with Independents much like it does with Democrats. It is also an issue that appears to matter more to those respondents who think their financial situation is worse now than a year ago. Florida's registered voters, as represented by survey respondents, clearly think health care is important. In April it ranked as the second most important issue and in September as a close third by respondents overall (see Table 1).

Another question posed in April and September to respondents was: "Thinking ahead to the presidential election this fall, how important will health care be to your vote for president this year?" (As noted, the other policy issues were also probed in separate questions.) Possible responses were "extremely important," "very important," "somewhat important," and "not important." Even if health care was not mentioned as the most important issue informing the vote for president, it figured prominently as a factor in respondents' decisions, as shown in Table 5. In both surveys, April and September, approximately three-fourths of voters identified health care as extremely important or very important:

Table 5
Importance of Health Care in Voting for President

Level of importance	April 2016 (N. 394)	September 2016 (N. 411)
Extremely important	36%	40%
Very important	39%	37%
Somewhat important	17%	14%
Not too important	7%	8%
DK/RF	1%	1%
Total	100%	100%

As noted previously, for all three partisan groups in both surveys, the economy was the most important issue by a large margin. The partisan difference is particularly observable with respect to respondents selecting the threat of terrorism as the most important issue. Republicans were decidedly more likely than Democrats in both April and September to cite the threat of terrorism as the most important issue. The uptick in the portion of all voter respondents to the threat of terrorism as most important might be in part due to the number, locations, and magnitude of terrorist attacks and the rhetoric on the campaign trail of Donald Trump. The terrorist attacks receiving extensive coverage during the months between April and September included the Orlando nightclub shooting (June 12), the attack in Nice, France (July 14), the Munich shooting (July 22), and Turkish car bombing (August 17). The overall percentage of respondents identifying the threat of terrorism as the most important issue increased overall only 4% between the two surveys. However, that relatively small number masks the shift among Independents. The portion of Independents identifying the threat of terrorism as central to their choice of president almost doubled from 12% to 22% between the April and September. Republicans became slightly more concerned, relative to other issues, about terrorism and Democrats slightly less concerned, during that time period.

Tax policy was not considered the most important issue by most voters regardless of party affiliation. Indeed, it ranked fifth (or tied with fifth) in both April and September, regardless of party affiliation. Even those respondents with college educations (an attribute which generally relates to higher incomes) did not rate tax policy at the top of the list any more than the overall population of respondents. (This finding is not included in any tables in this document.)

Like the threat of terrorism, immigration was cited more by Republican voters than Democratic voters in both the April and September UFSRC surveys and Independents tended to be more like Democrats in their responses. Perhaps this finding with respect to Republicans is not surprising since immigration was such a prominent platform in Donald Trump's campaign but it clearly was not considered most important by the vast majority of Independent voters and was considered extremely or very important by slightly more than half of all voters in April and September, lagging behind the other issues including tax policy. (The latter finding was not including in any tables in this document.)

With only a few days left until election day, the presidential campaigns will be trying to lure Florida's undecided or uncommitted voters to the polls. Registered voters who are not affiliated with either the Republican or Democratic Party are on the whole less likely to turn out and vote so may require a bit more coaxing. In Florida, there are over 3 million unaffiliated or Independent registered voters. Issues that matter the most to them are the economy, threat of terrorism, and health care. The latter issue has not received as much attention as the other two in this election cycle. Perhaps it is not too late to give it the attention it deserves! And it is an issue that is not likely to diminish in importance once the new president is elected.

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