

DECEMBER 2022



CYGNAL

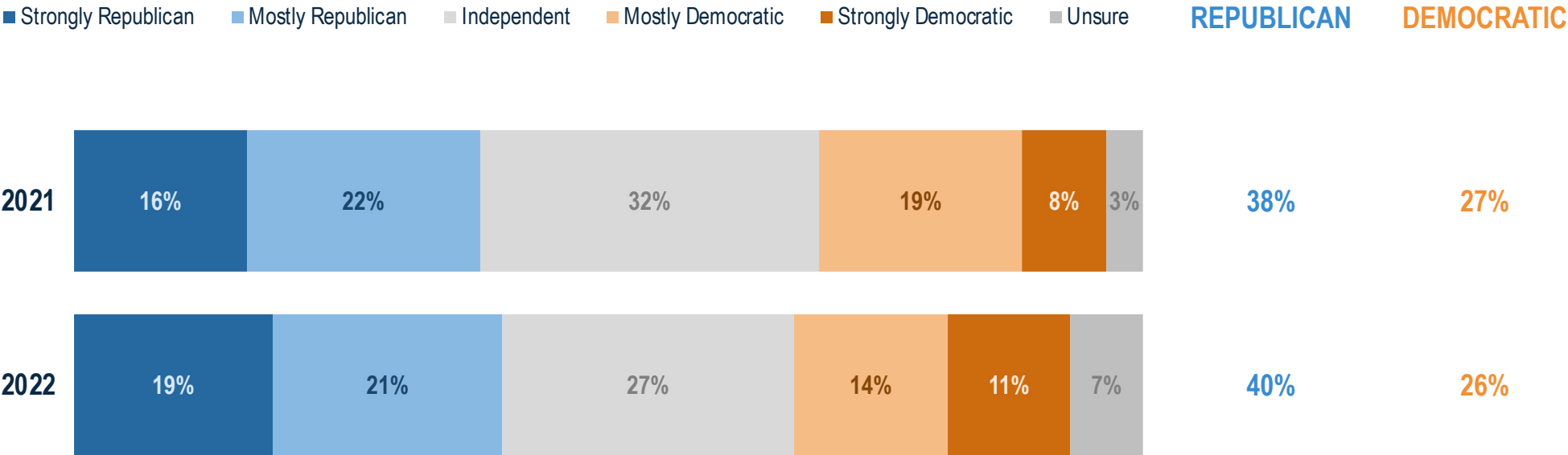
Iowa Statewide Survey of Working-Age Residents

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Iowa continues to lean Republican

Not much has changed in regards to partisanship among Iowa’s working-age residents. However 4% more voters feel unsure about their partisan preference since the 2021 survey of the same audience. Republicans tend to be men, non-college-educated, rural/suburban, and higher income voters.



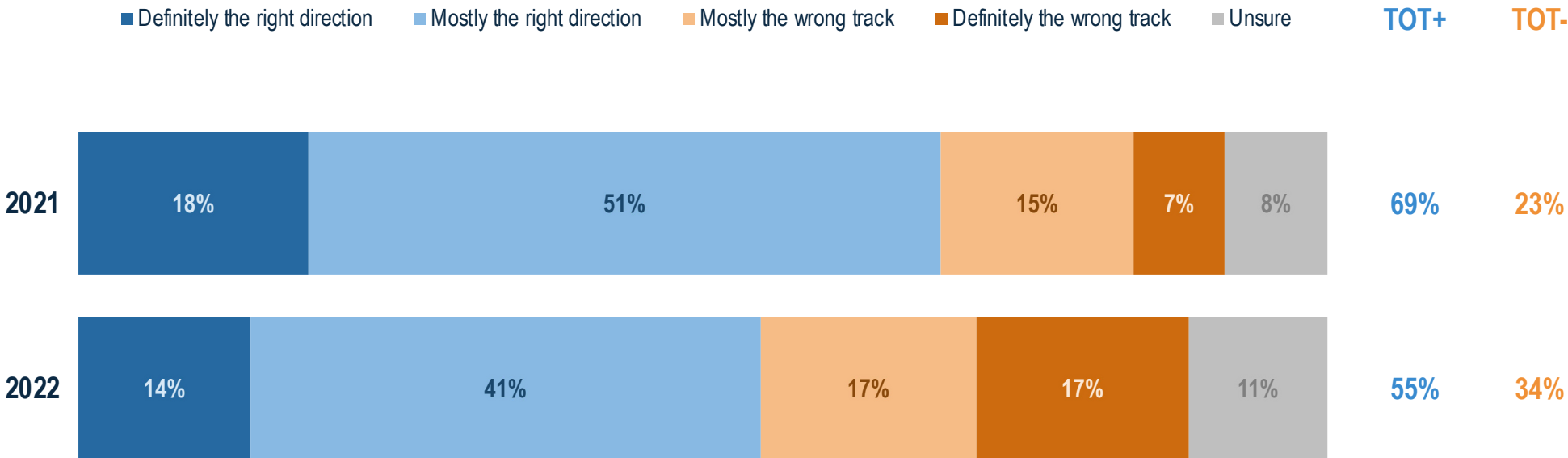
2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
REPUBLICAN	40%	34%	47%	33%	39%	45%	77%	14%	4%	42%	36%	31%	41%	51%	47%	38%	31%	34%	47%
DEMOCRATIC	26%	32%	20%	28%	27%	23%	5%	20%	76%	22%	36%	24%	29%	25%	20%	27%	34%	30%	22%

Pessimism about the direction of the state is on the rise

Pessimism has increased 11% since 2021, though a majority of voters say that Iowa is heading in the right direction.

- Women, college-educated voters, and urban residents are split on the direction of the state.

While Iowans who want to leave are split, nearly two-thirds of Iowans who opt to stay in the state are optimistic about the direction Iowa is heading.



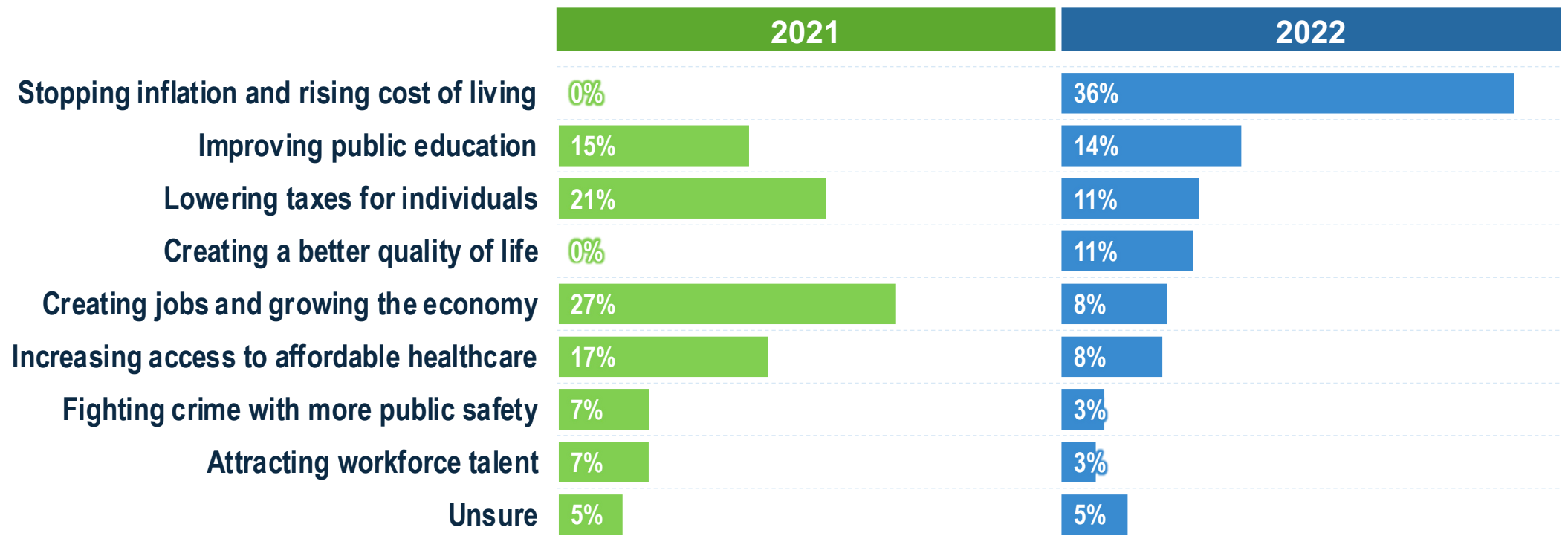
TOT+ = the sum of the two most positive values

TOT- = the sum of the two most negative values

2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
TOT+	55%	45%	64%	52%	52%	58%	79%	43%	23%	57%	49%	50%	53%	63%	61%	51%	47%	47%	63%
TOT-	34%	41%	27%	33%	38%	32%	17%	34%	70%	30%	44%	31%	39%	34%	27%	38%	41%	43%	26%

Top Priorities: inflation, education, and taxes

- Stopping inflation is 30% or higher among: respondents of all ages, non-college-educated respondents, <\$100k earners, urbanites, people who've considered leaving the state.
- Improving public education 22% or higher among: college-educated respondents, liberals, and \$100k+ earners.
- Lowering taxes for individuals is 14% or higher among: men, conservatives, respondents 46-65, and rural voters.

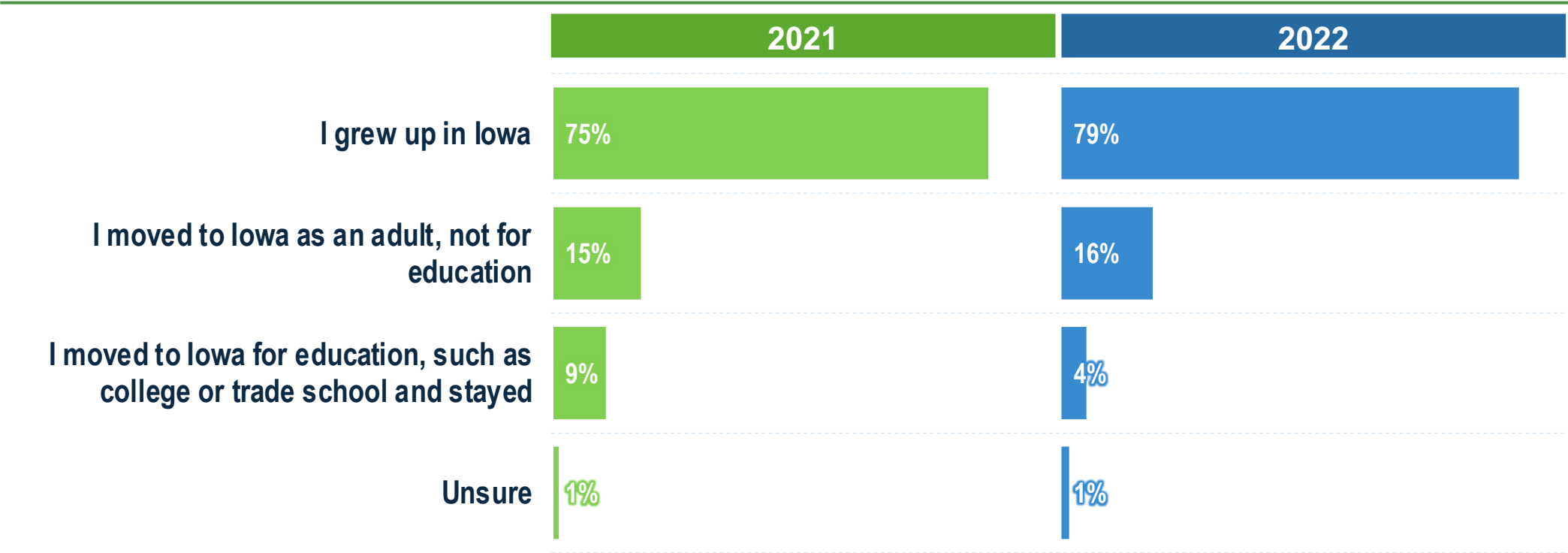


2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
Stopping inflation and rising cost of living	36%	37%	36%	33%	34%	40%	47%	32%	20%	41%	25%	37%	39%	32%	39%	34%	34%	31%	41%
Improving public education	14%	15%	13%	15%	17%	12%	8%	13%	28%	10%	26%	8%	15%	22%	11%	18%	16%	17%	12%
Lowering taxes for individuals	11%	8%	14%	7%	12%	13%	16%	9%	4%	11%	11%	7%	11%	16%	14%	10%	7%	9%	13%

Over three-quarters of respondents grew up in Iowa

Respondents making up the 21% who did not grow up in the state are more likely to be:

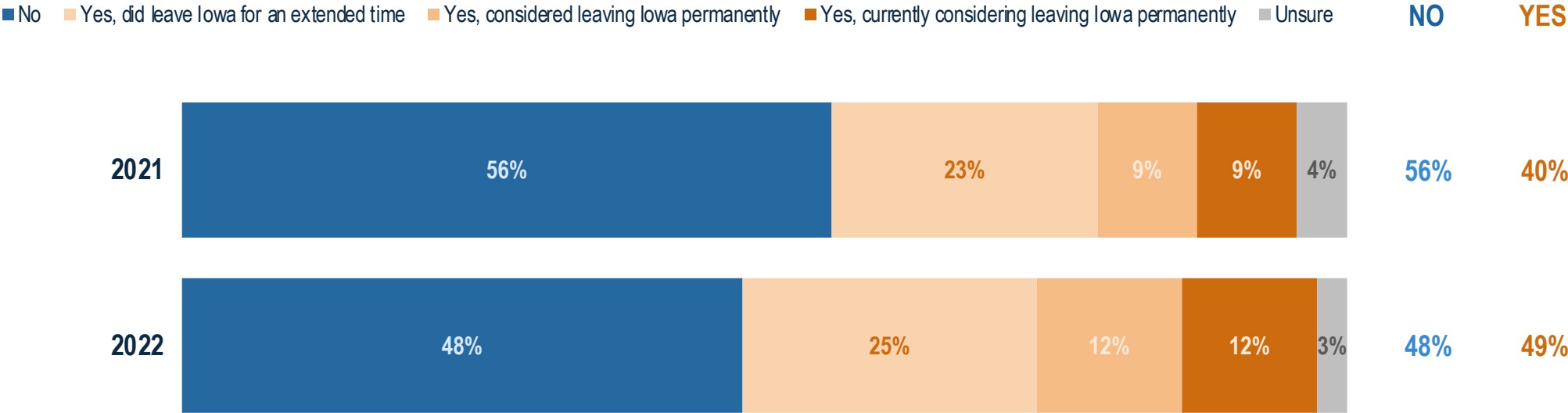
- \$100k+ earners (18% moved for ed, 4% not ed)
- In CD1 (6% moved for ed, 16% not for ed) and CD2 (4% moved for ed, 18% not ed)
- Respondents with a college degree (7% moved for ed, 18% not ed)



2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
I grew up in Iowa	79%	78%	80%	79%	78%	80%	80%	77%	80%	80%	75%	78%	80%	78%	82%	73%	80%	78%	82%
I moved to Iowa as an adult, not for education	16%	16%	15%	11%	15%	18%	18%	15%	13%	15%	18%	15%	15%	18%	14%	20%	13%	16%	14%
I moved to Iowa for education, such as college ...	4%	4%	4%	8%	5%	2%	2%	6%	6%	3%	7%	4%	4%	4%	2%	6%	5%	5%	3%

Nearly half have never considered leaving & many who did came back

- Over half of people making \$50k-\$100k and those in CD2 or CD4 have never considered leaving.
- The 12% who are currently considering leaving are more likely to be liberal, suburban/urban, make more than \$100K, women under age 25, and/or live in CD1.
- Those who left and came back are more likely to be: Republican or Independent, a rural respondent, a high-income earner, white, and/or aged 50-65.

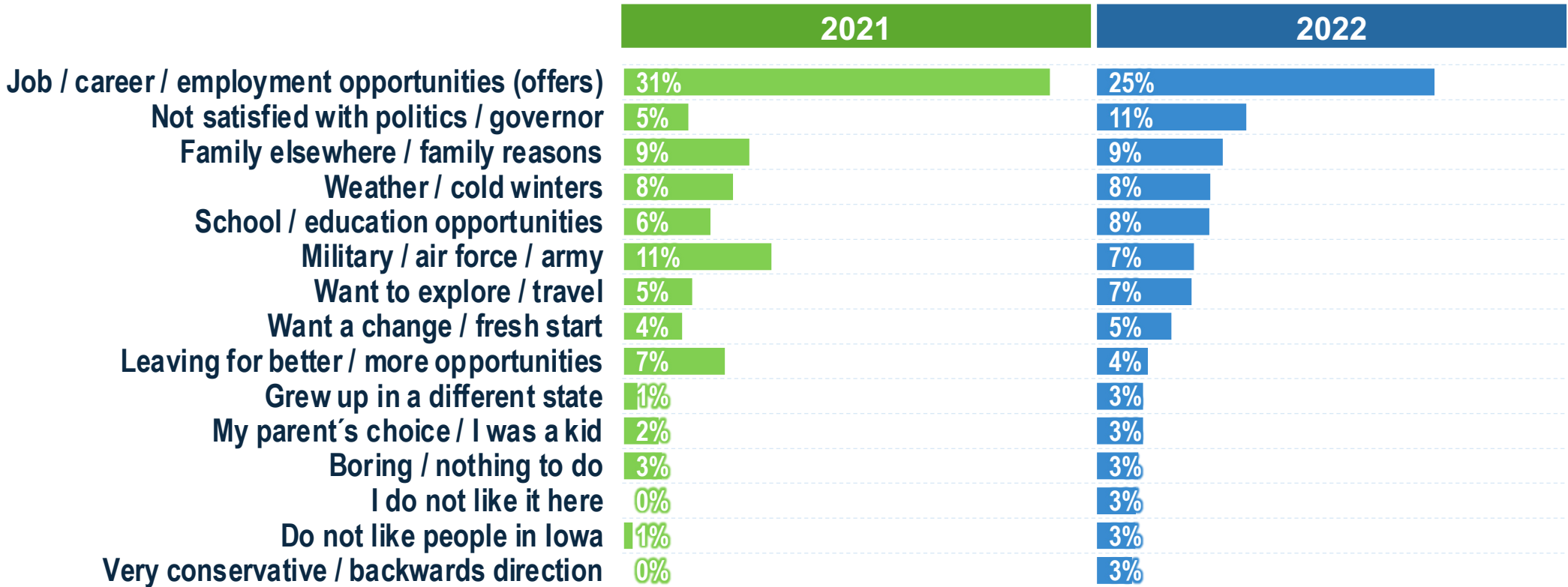


2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY		
	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328
NO	48%	50%	46%	49%	45%	51%	55%	47%	35%	51%	40%	46%	54%	45%	54%	44%	43%
YES	49%	48%	50%	48%	53%	47%	43%	49%	63%	46%	58%	51%	43%	54%	44%	53%	54%

Why leave Iowa? Jobs, family, and dissatisfaction with the politics

- 32% of the respondents who considered leaving (or left for a period of time) did so for career opportunities or due to their military service. The next-highest response was dissatisfaction with politics in the state, particularly among liberals, voters under the age of 29, and college-educated respondents.
- Those who considered leaving for their career are more likely to be men, make \$100K+, college-educated, and in CD2.

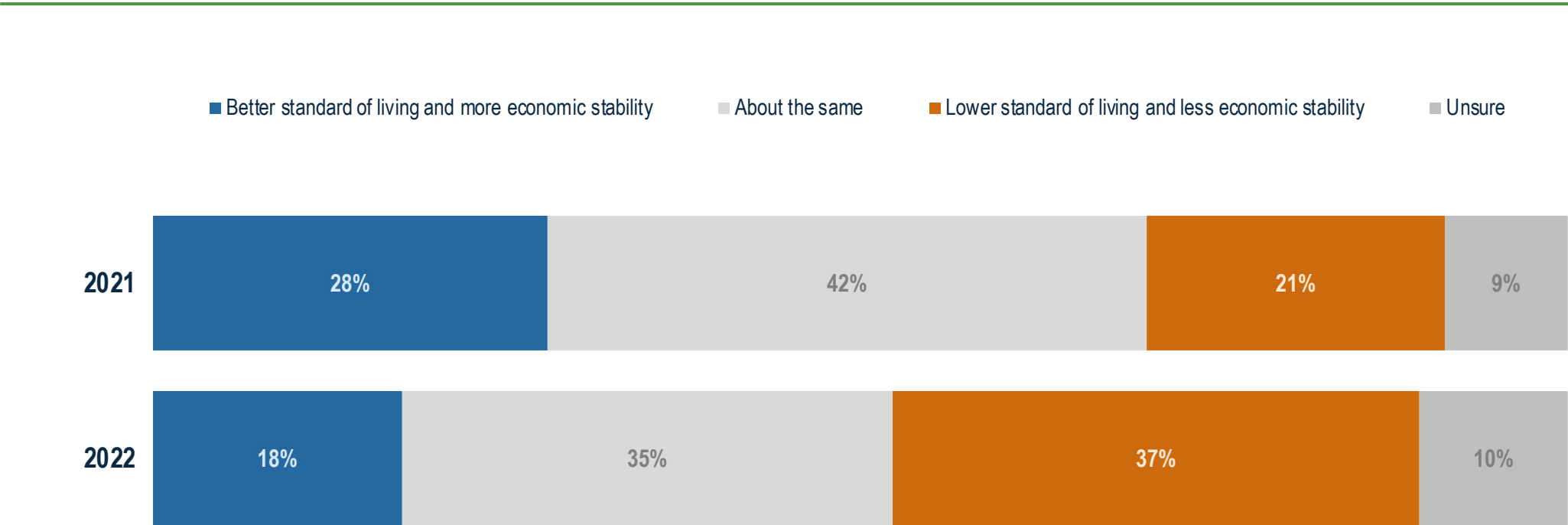
TOP 15



2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY		
TOP 3	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban
NUMBER OF RESPONDENTS	620	298	322	112	236	272	171	224	225	367	253	247	201	172	229	213	178
Job / career / employment opportunities (offers)	25%	19%	30%	15%	22%	34%	30%	20%	22%	19%	35%	20%	22%	33%	29%	24%	20%
Not satisfied with politics / governor	11%	10%	11%	16%	11%	8%	2%	7%	27%	8%	16%	5%	16%	13%	9%	12%	12%
Family elsewhere / family reasons	9%	13%	6%	6%	10%	10%	9%	13%	5%	12%	4%	12%	8%	7%	9%	8%	11%

Optimism about a better or same standard of living has dropped

Among the 37% who think it will be lower, we see more women than men, more 46-65-year-olds than younger folks, more Democrats than Republicans and Independents, and more people who've considered leaving than those who have not.



2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION			INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+		Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302		494	390	328	620	559
Better standard of living and more econom ...	18%	14%	21%	19%	17%	17%	23%	16%	10%	17%	18%	16%	17%	21%		18%	15%	20%	15%	20%
About the same	35%	35%	34%	34%	36%	34%	38%	33%	30%	35%	33%	33%	36%	35%		34%	37%	33%	30%	40%
Lower standard of living and less economi ...	37%	40%	34%	31%	37%	41%	32%	32%	55%	35%	43%	36%	38%	38%		38%	36%	37%	45%	31%

Not much movement in sentiment about individual taxes

Noticeable differences exist via:

- Age: those over 30 are more likely to think they're too high
- Congressional District: those in CDs 1 and 3 are more likely to think they're too high
- Party: Republicans are more likely to think they're too high

■ Much too high

■ A little too high

■ About right

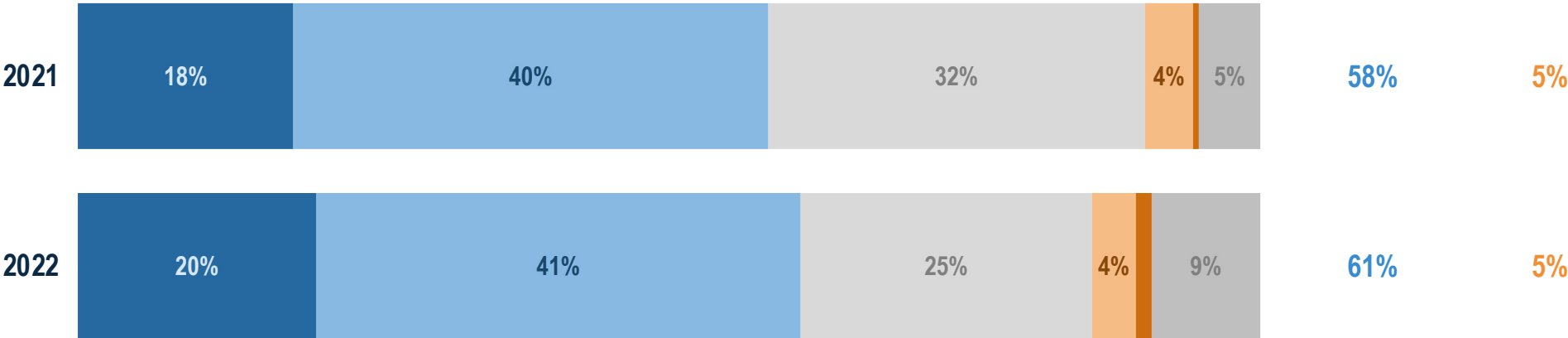
■ A little too low

■ Much too low

■ Unsure

TOO HIGH

TOO LOW



TOO HIGH = the sum of the two most positive options

TOO LOW = the sum of the two most negative options

2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
TOO HIGH	61%	61%	61%	53%	61%	66%	70%	61%	44%	66%	49%	63%	61%	59%	67%	57%	56%	61%	62%
TOO LOW	5%	4%	6%	4%	7%	3%	1%	3%	16%	3%	11%	3%	6%	6%	4%	5%	8%	8%	2%

68% say property taxes too high, esp. conservatives & older respondents

Noticeable differences exist via:

- Age: those over 30 and especially those over 46 are more likely to think they're too high
- Congressional District: those in CD 2 are less likely than the other districts to think they're too high
- Party: Republicans are more likely to think they're too high
- Urbanicity: rural respondents are more likely to think they're too high

Much too high

A little too high

About right

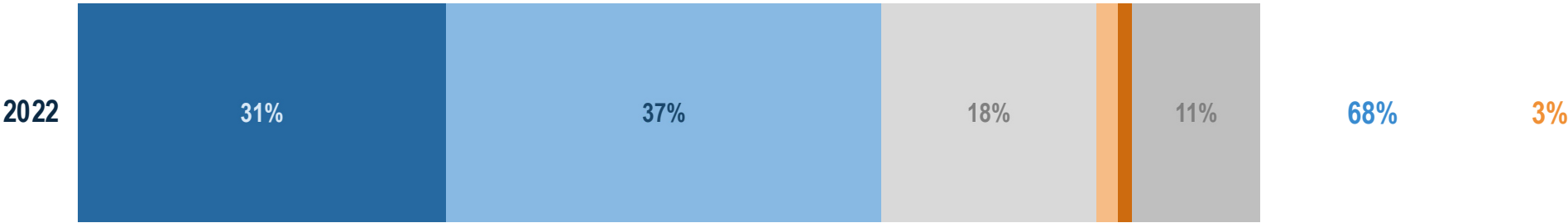
A little too low

Much too low

Unsure

TOO HIGH

TOO LOW



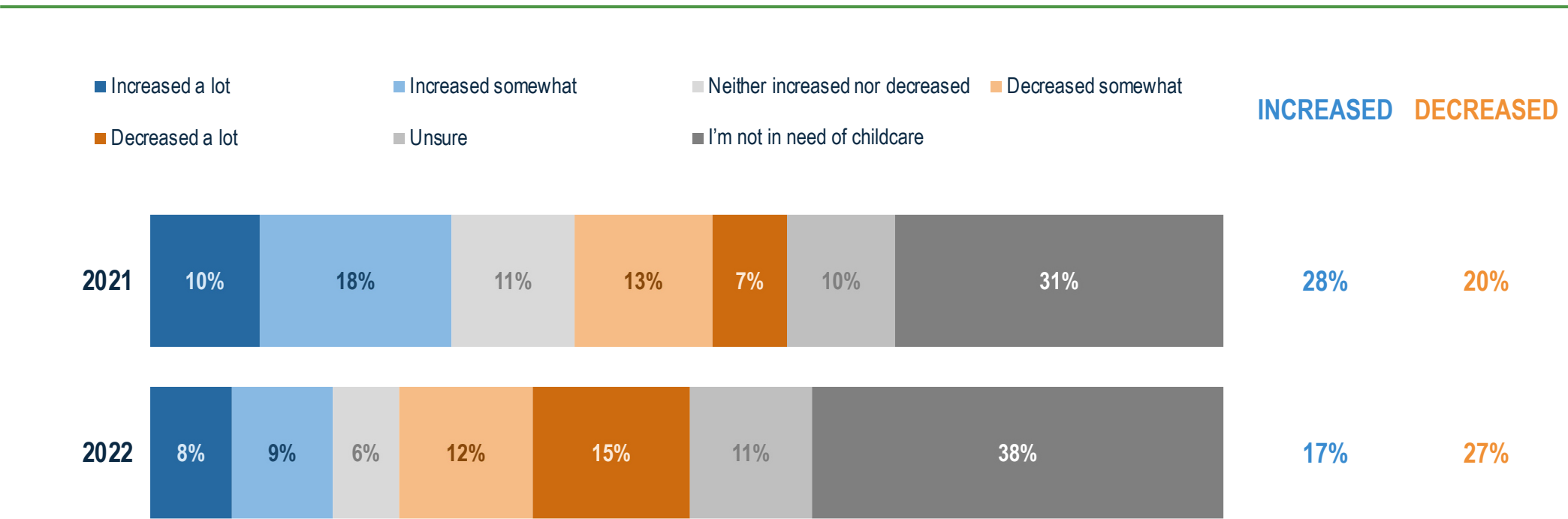
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2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
TOO HIGH	68%	67%	69%	58%	67%	75%	78%	65%	52%	70%	62%	66%	69%	69%	72%	64%	67%	66%	70%
TOO LOW	3%	3%	3%	3%	5%	2%	1%	3%	8%	2%	6%	2%	3%	5%	3%	3%	4%	4%	2%

Among those who need childcare, over half say it has *decreased*

Respondents aged 30-45 (aka those most likely to be parents), Democrats, racial minorities, high-income earners, and rural respondents are particularly likely to have noticed a decrease in access to affordable childcare.

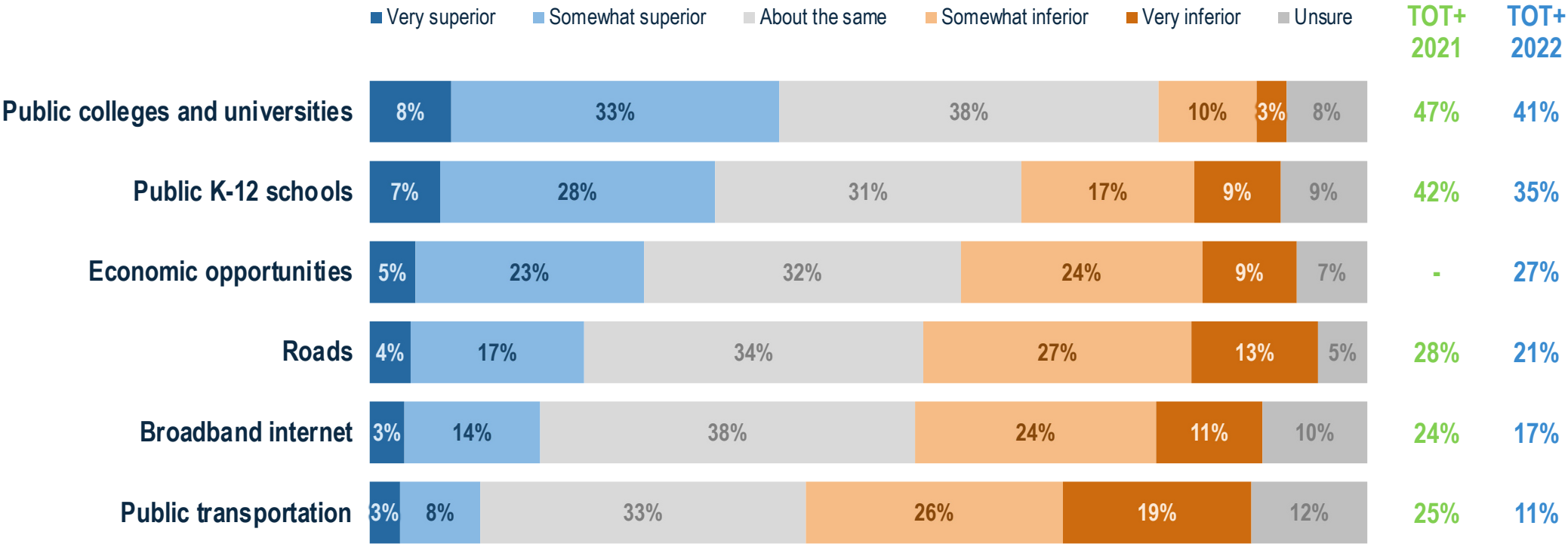


2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
INCREASED	17%	14%	20%	17%	25%	10%	18%	18%	13%	17%	16%	17%	16%	18%	16%	18%	18%	18%	16%
DECREASED	27%	31%	23%	22%	31%	27%	22%	25%	40%	24%	34%	24%	28%	30%	29%	27%	23%	28%	27%



Education is viewed as the same or superior to other states

- With the exception of low-income earners and rural respondents, at least 38% of every major demographic group thinks the post-secondary schools are superior (low-income: 36% / rural: 34%).
- For K-12 schools, support is especially high among 46-65-year-olds, college-educated respondents, high-income earners, and rural/suburban respondents.
- The state’s economic opportunities are a highlight for men, conservatives, and high-income earners.

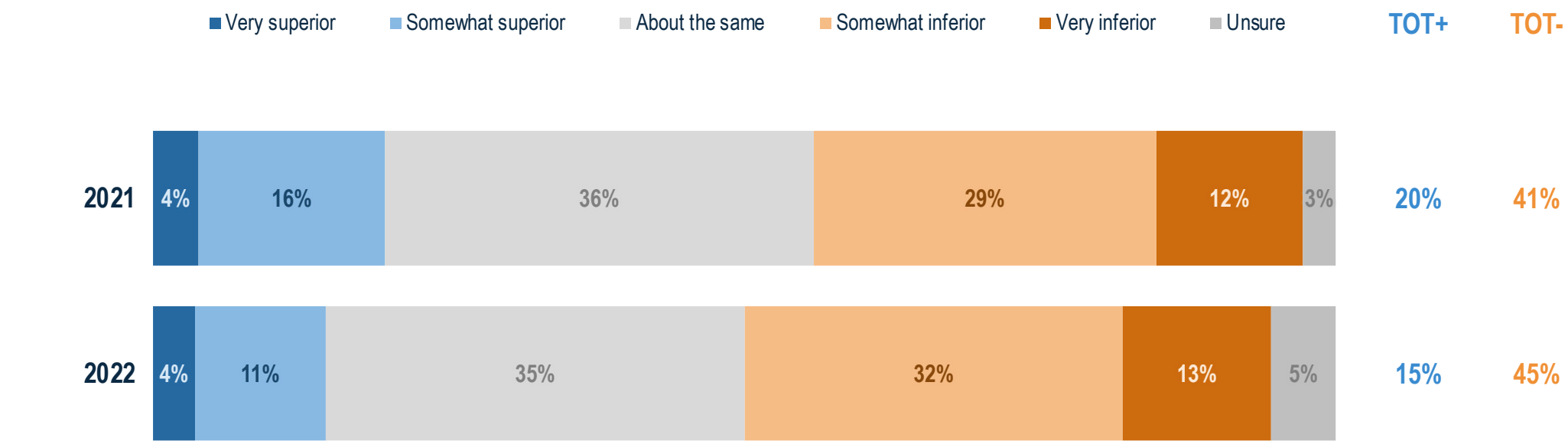


TOT+ = the sum of the two most positive values

2022 - TOT+	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
TOP3	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
Public colleges and universities	41%	38%	44%	42%	38%	44%	52%	32%	32%	39%	47%	36%	40%	49%	43%	44%	34%	36%	47%
Public K-12 schools	35%	31%	39%	30%	32%	40%	46%	28%	22%	33%	38%	26%	35%	46%	38%	35%	28%	31%	39%
Economic opportunities	27%	22%	33%	30%	25%	28%	42%	18%	12%	27%	28%	21%	27%	36%	30%	27%	23%	22%	33%

Entertainment presents a challenge with 45% saying Iowa's is inferior

Respondents over the age of 30, people in CD2, white respondents, high-income earners, rural/suburban respondents, and people who've considered leaving are the most likely to think Iowa's entertainment options leave something to be desired.



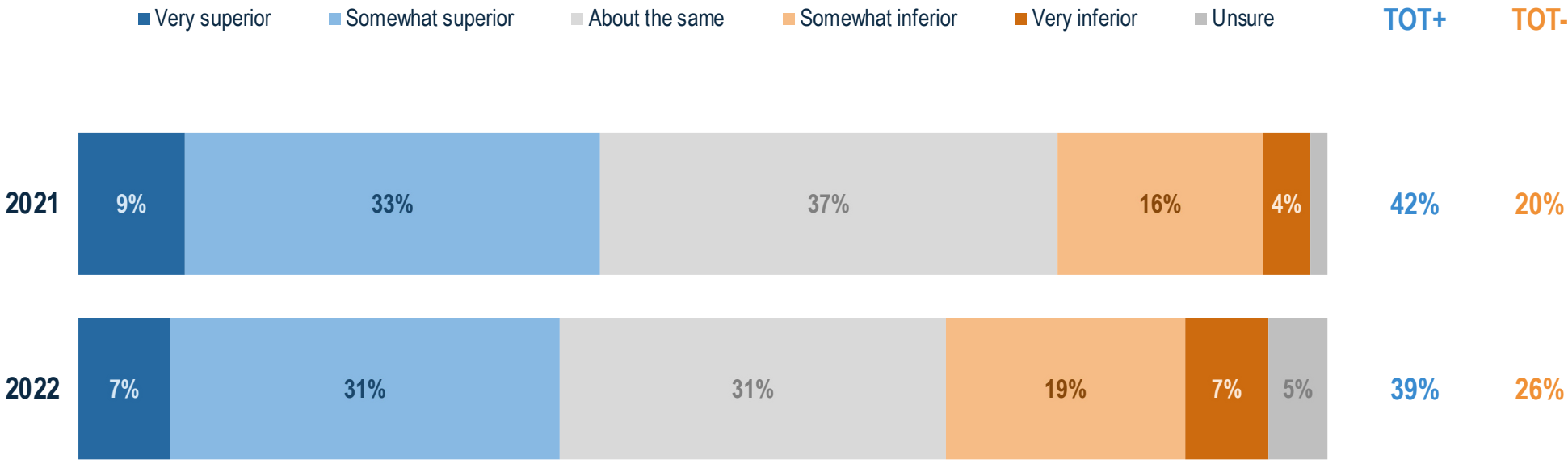
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2022	TOTAL	GENDER		AGE			IDEOLOGY			EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
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NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
TOT+	15%	13%	16%	22%	13%	11%	19%	11%	11%	16%	12%	17%	13%	13%	13%	14%	19%	12%	17%
TOT-	45%	46%	43%	38%	49%	45%	39%	42%	60%	41%	53%	38%	46%	51%	47%	46%	39%	52%	38%

Outdoor recreation continues to be a major selling point

The 1-in-4 who think the state’s outdoor recreational opportunities are inferior are more likely to be: aged 18-29, in CDs 2 or 4, liberal, and/or someone who’s considered leaving (though a plurality of all these groups believe they’re superior overall).



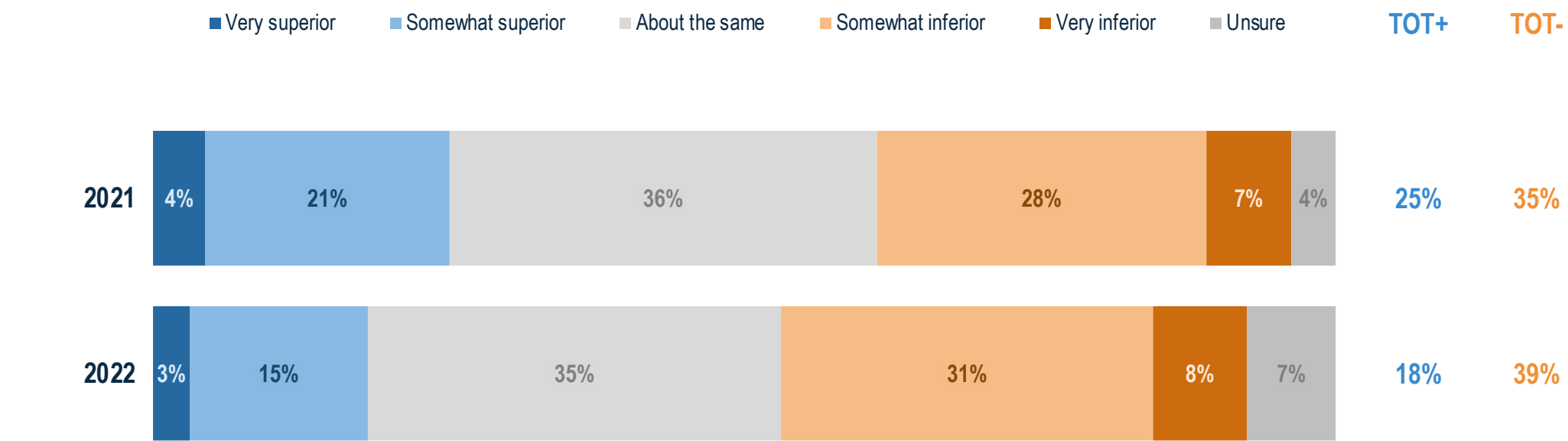
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NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
TOT+	39%	37%	40%	40%	38%	38%	48%	29%	34%	38%	39%	39%	38%	38%	39%	38%	39%	37%	42%
TOT-	26%	25%	27%	29%	26%	24%	21%	27%	32%	24%	30%	23%	24%	31%	23%	30%	26%	30%	21%

Respondents see professional opportunities lacking in the states

- Most respondents are lukewarm in their response – there are many more *somewhat* inferior/superior than *very* inferior/superior.
- Non-college-educated and lower income respondents are particularly negative on this topic.
- Democrats are more negative than Republicans and Independents.



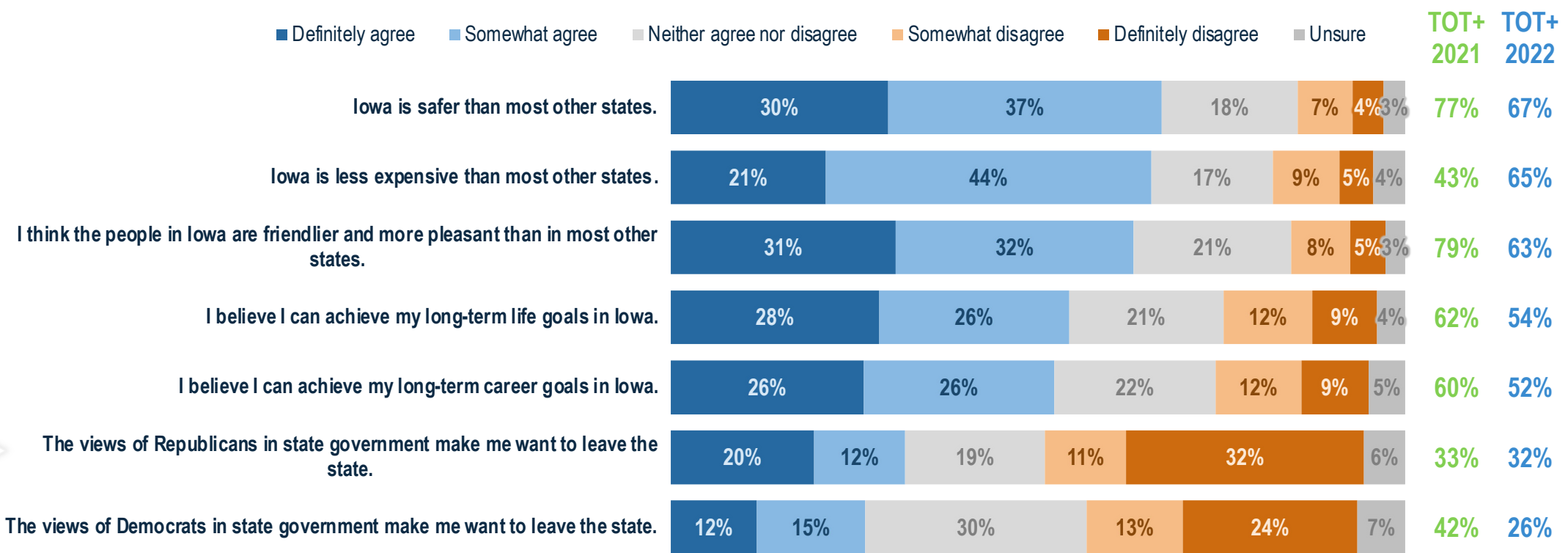
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NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
TOT+	18%	15%	21%	19%	20%	16%	24%	15%	12%	17%	22%	17%	16%	21%	17%	19%	18%	15%	21%
TOT-	39%	42%	37%	33%	43%	40%	31%	36%	60%	35%	50%	34%	43%	43%	41%	37%	40%	48%	32%

Most lowans agree with every positive non-political statement tested

The top three statements remain the same as in 2021 and have to do with the experience of living in Iowa, while the middle two remain focused on accomplishing goals while living in Iowa. Respondents need to know that they can enjoy the safety, affordability, and the people of Iowa without compromising their long-term goals.

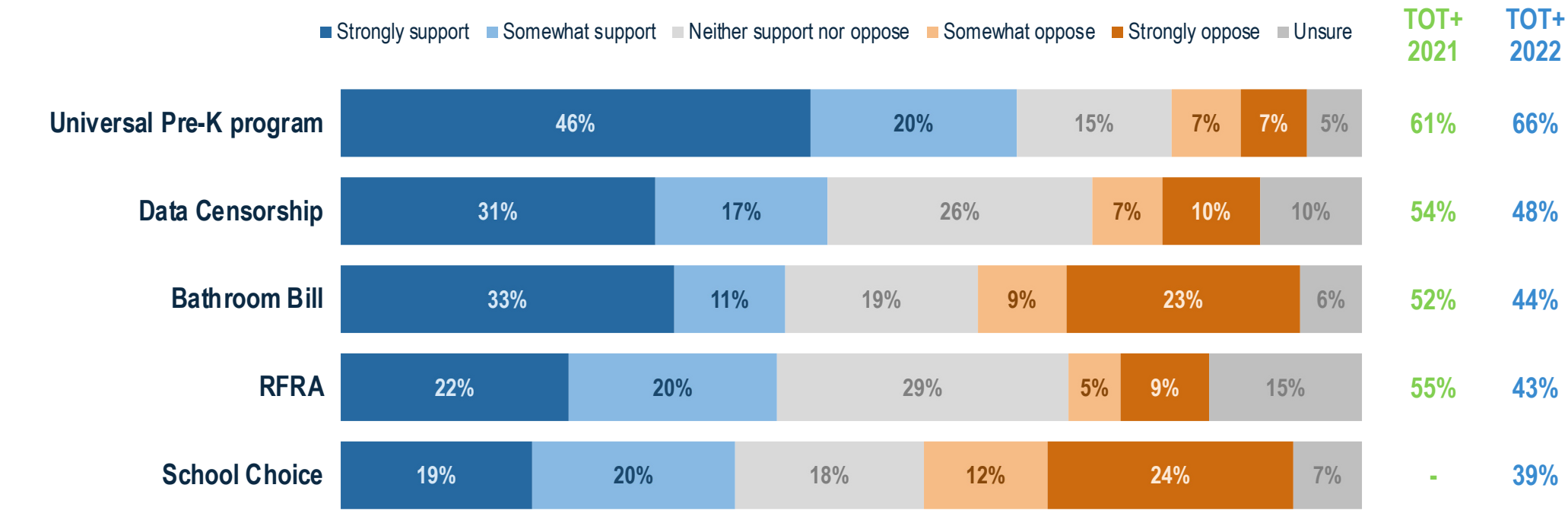


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TOP3	TOTAL	Female	Male	18-29	30-45	46-65	Con	Mod	Lib	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
Iowa is safer than most other states.	67%	62%	71%	59%	68%	71%	80%	54%	59%	64%	74%	59%	65%	79%	72%	69%	55%	61%	74%
Iowa is less expensive than most other st ...	65%	62%	69%	62%	71%	63%	72%	54%	69%	61%	77%	57%	66%	75%	67%	67%	60%	62%	70%
I think the people in Iowa are friendlier ...	63%	59%	67%	62%	59%	67%	76%	51%	53%	61%	69%	56%	64%	71%	69%	60%	56%	54%	72%

RFRA and the Bathroom Bill see strong drops in support

- Universal Pre-K is overwhelmingly popular.
- The RFRA, outlawing tax breaks/contracts for companies that censor, receives its strongest support from conservatives. While 44% of respondents support it, nearly a third remain unconvinced one way or the other.
- Voters are split on school choice, but it has more support than opposition among men, Republicans, suburbanites, 18-29-year-olds, rural/suburban respondents, non-college-educated respondents, and outside of CD3.



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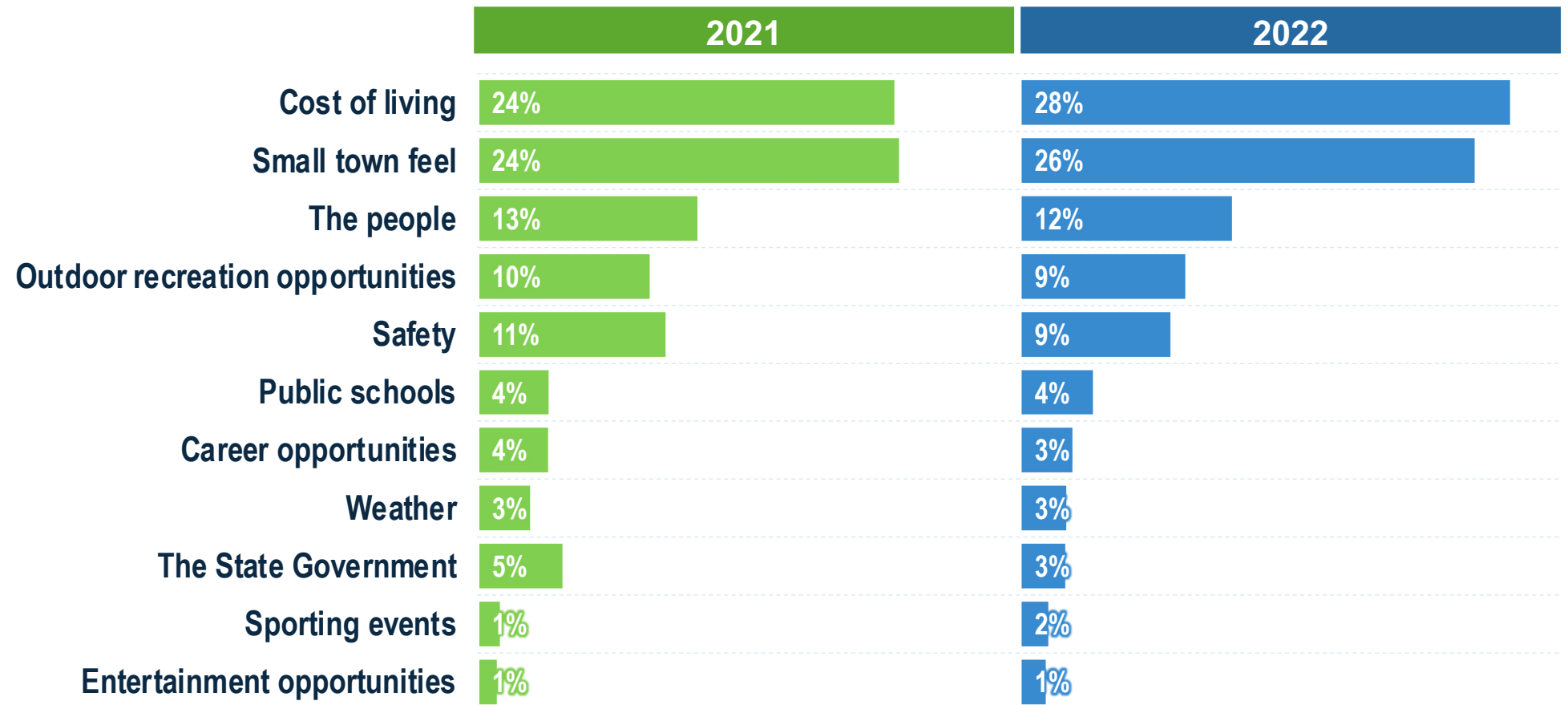
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NUMBER OF RESPONDENTS	1212	608	604	227	433	552	397	453	362	780	432	476	434	302	494	390	328	620	559
Universal Pre-K program	66%	69%	64%	69%	68%	63%	55%	66%	90%	64%	71%	64%	70%	65%	63%	69%	68%	70%	63%
Data Censorship	48%	39%	56%	38%	45%	56%	65%	33%	33%	48%	47%	41%	49%	55%	53%	45%	41%	48%	48%
Bathroom Bill	44%	36%	51%	33%	41%	52%	68%	32%	10%	46%	37%	39%	43%	50%	52%	38%	36%	41%	47%
RFRA	43%	38%	47%	45%	41%	42%	57%	28%	36%	42%	44%	39%	42%	48%	41%	45%	43%	41%	45%
School Choice	39%	34%	43%	37%	40%	38%	53%	29%	23%	39%	37%	39%	38%	38%	39%	42%	35%	36%	42%



MaxDiff answers “Why Iowa?” Cost of living and small-town feel

- While the people, safety, and outdoor recreational opportunities are popular, they fall well short of the small town feel and cost of living.
- The state government and schools get even lower marks than last year– however, it's important to realize that many respondents may take these things for granted. They're not positively motivated by them because there's no problem with them. If they felt there was a problem, they'd likely be highly motivated in a negative way.
- Respondents are still not impressed with the career opportunities, weather, sporting events, or entertainment.

THE MOST PREFERRED
simulates a situation in which the respondents choose from all items the one with the highest preference

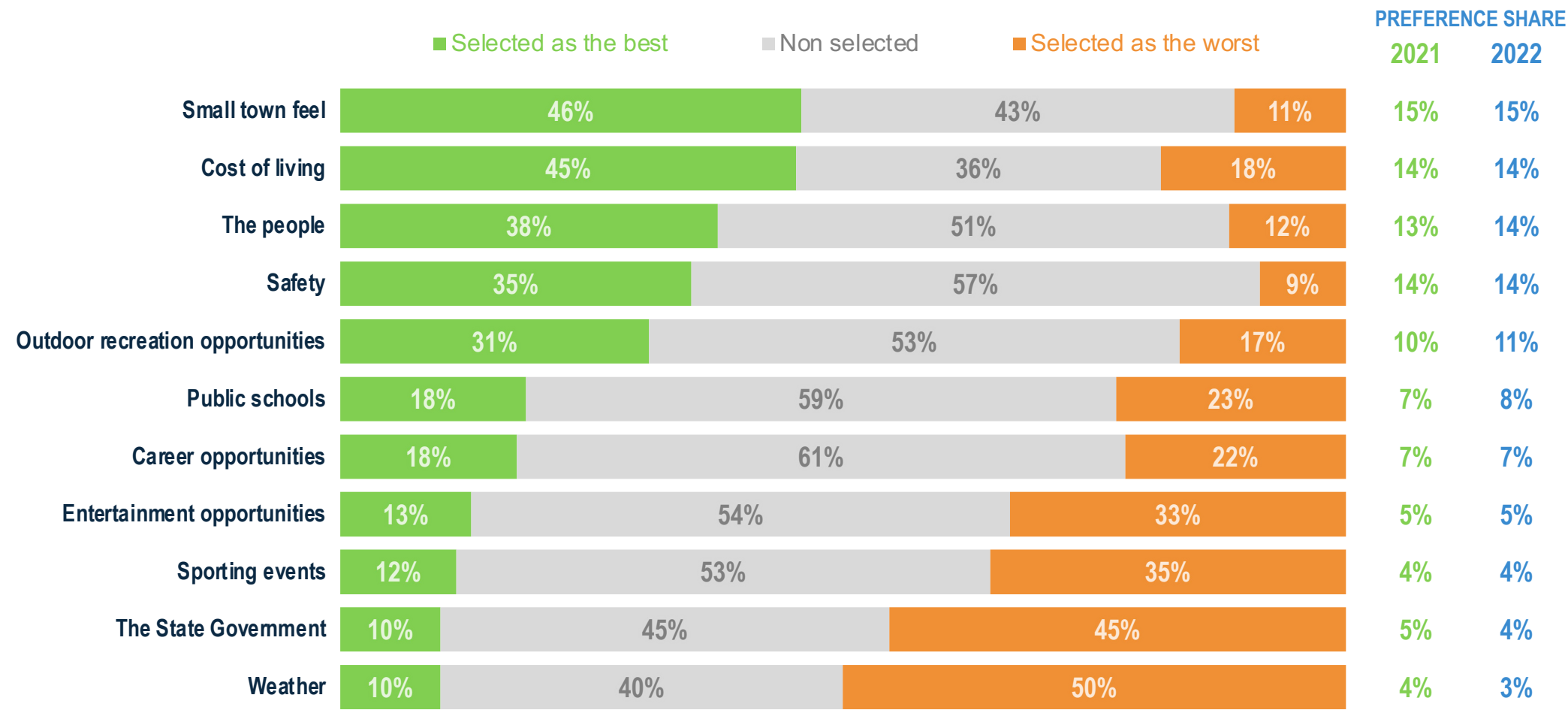




Similar results when viewed as simulated distribution of 100%

- Once again, the small town feel and cost of living are the most appreciated, with the people, safety, and outdoor recreation representing a second tier of attributes.
- Entertainment, weather, and sporting events are at the bottom. Highlighting fun winter activities that Iowa is uniquely suited for (snowshoeing, cross country skiing, etc.) could help alleviate some of this dissatisfaction. Likewise, efforts to brand Uofl and ISU sports as “for everyone in the state” as opposed to just for the schools’ students and alumni could create more of a community feel for both universities’ teams.

PREFERENCE SHARE
 simulates a situation in which
 respondents distribute 100%
 among all items according to
 their preferences



ICA-IA

SAMPLE STRUCTURE

PROJECT SPECIFICATION



Research Problem

- The Iowa Chamber Alliance (ICA) has moved talent attraction to the top of their agenda for the past few years and is interested in understanding any shifts in the issues that are important to Iowa's labor force. Iowa needs to find new people willing to move to the state by first understanding what working-age Iowans find attractive about living there and how that has changed in the last twelve months.



Target group

- Registered voters
- Residents of Iowa
- Age 18-65
- Weighted results to get sample structure representative



Methodology

- Quantitative CAWI (Computer Administered Web Interviewing) survey
- Used online panel
- A total of **1212 respondents**
- Interviewed **1 – 11 December 2022**

SAMPLE STRUCTURE 2022

