State Taxes and Revenue Options in West Virginia: Survey Methodology and Annotated Questionnaire

February 2022

Methodology

In December 2021, AARP engaged MBE Research (MBE) to conduct a quantitative research study among registered voters in West Virginia. MBE completed a total of 700 live telephone interviews including 35% conducted among a cell phone sample. Both landline and cell phone sampling were used for this research, with the sample drawn randomly from a list of West Virginia voters age 18 and older purchased from Aristotle.

The base sample of 700 respondents yields a maximum statistical error of $\pm 3.63\%$ at the 95% level of confidence. Some percentages of some questions may exceed 100% due to rounding or the use of multiple response question formats. All data have been weighted by age and gender according to 2021 West Virginia state voter database statistics

Screening Questions

S1. Our study is interested in the opinions of certain age groups. Could you please tell me your age as of your last birthday?

	Total (%)
<i>Unweighted n</i>	700
18-34	13
35-49	35
50-64	18
65+	34

S2. And just to confirm, are you a resident of West Virginia?

	Total (%)
<i>Unweighted n</i>	700
Yes [CONTINUE]	100
No [TERMINATE]	-
Don't know [TERMINATE]	-
Refused [TERMINATE]	-

S3. What is your 5-digit zip code?

S4. And are you registered to vote in West Virginia?

	Total (%)
<i>Unweighted n</i>	700
Yes [CONTINUE]	100
No [TERMINATE]	-
Don't know [TERMINATE]	-
Refused [TERMINATE]	-

S5. How often would you say you vote in state and local elections for Governor, Congressional representatives, and Mayors? Would you say you: always vote in state and local elections, nearly always vote, sometimes vote, seldom vote, or have never voted in a state or local election?

	Total (%)
<i>Unweighted n</i>	700
Always	73
Nearly always	14
Sometimes	9
Seldom	4
Never	-
Would rather not say [VOL]	-
Not sure [VOL]	-
Refused [VOL]	-

Main

1. How would you rate the current condition of the economy in West Virginia? Is it excellent, good, fair, or poor?

	Total (%)
<i>Unweighted n</i>	700
Excellent	1
Good	12
Fair	38
Poor	48
Not sure	2
	-

2. And how would you rate your own personal financial situation these days.....would you say you are in excellent shape, good shape, fair shape, or in poor shape financially? [REVERSE RESPONSE SCALE EVERY OTHER TIME]

	Total (%)
<i>Unweighted n</i>	700
Excellent	9
Good	36
Fair	37
Poor	17
Not sure	-
Refused	1

3. There has been a lot of talk in the news recently about people considering leaving West Virginia to live elsewhere. In the past year, have you personally considered leaving West Virginia?

	Total (%)
<i>Unweighted n</i>	700
Yes	28
No	72
Not sure	-
Refused	-

4. [IF Q3 = Yes] Which of the following best describes your reason for moving from West Virginia and residing in another state? Is it for... [INSERT AND RANDOMIZE a-l; ANCHOR k; MULTIPLE RESPONSES ALLOWED]

	Total (%)
<i>Unweighted n</i>	195
Better job opportunities	43
Better weather or climate	29
Lower taxes	26
Better kindergarten to 12th grade school system	11
Higher education opportunities	18
Health or health care reasons	20
A safer community or lower crime rate	18
Family reasons – be with or live closer to other family members	21
Better run state or local government	23
Lower overall cost of living	17
Other reason (specify):	17
Not sure	3
Refused	-

5. And in the past year, have you heard someone you know talk about leaving West Virginia?

	Total (%)
<i>Unweighted n</i>	700
Yes	51
No	49
Not sure	-
Refused	-

6. [IF Q5 = Yes] And what is their reason for wanting to leave West Virginia to live somewhere else? Is it...?

	Total (%)
<i>Unweighted n</i>	353
Better job opportunities	70
Better weather or climate	13
Lower taxes	12
Better kindergarten to 12th grade school system	11
Higher education opportunities	15
Health or health care reasons	6
A safer community or lower crime rate	7
Family reasons – be with or live closer to other family members	12
Better run state or local government	11
Lower overall cost of living	8
Other reason (specify):	15
Not sure	4
Refused	-

7. Now, I'm going to read a list of issues facing many West Virginians today. For each one, please tell me if you think that issue should be a high priority (H), medium priority (M), or low priority (L) for the state to address over the next few years.

a. Public education k-12

	Total (%)
<i>Unweighted n</i>	700
High priority	75
Medium priority	20
Low priority	5
Don't know	1

b. Taxes

	Total (%)
<i>Unweighted n</i>	700
High priority	43
Medium priority	41
Low priority	14
Don't know	3

c. Health care

	Total (%)
<i>Unweighted n</i>	700
High priority	69
Medium priority	26
Low priority	4
Don't know	1

d. Housing

	Total (%)
<i>Unweighted n</i>	700
High priority	40
Medium priority	42
Low priority	16
Don't know	2

e. Prescription drugs

	Total (%)
<i>Unweighted n</i>	700
High priority	62
Medium priority	28
Low priority	7
Don't know	2

f. Air and water quality

	Total (%)
<i>Unweighted n</i>	700
High priority	45
Medium priority	35
Low priority	20
Don't know	-

g. Higher education

	Total (%)
<i>Unweighted n</i>	700
High priority	47
Medium priority	38
Low priority	14
Don't know	1

h. Transportation and infrastructure

	Total (%)
<i>Unweighted n</i>	700
High priority	66
Medium priority	27
Low priority	6
Don't know	-

i. Utility costs

	Total (%)
<i>Unweighted n</i>	700
High priority	52
Medium priority	39
Low priority	7
Don't know	4

j. Legalization of recreational marijuana

	Total (%)
<i>Unweighted n</i>	700
High priority	27
Medium priority	22
Low priority	49
Don't know	2

k. Programs and services for older individuals, people with disabilities, and low-income individuals and families

	Total (%)
<i>Unweighted n</i>	700
High priority	58
Medium priority	32
Low priority	8
Don't know	2

I. Public safety

	Total (%)
<i>Unweighted n</i>	700
High priority	44
Medium priority	41
Low priority	15
Don't know	-

m. Jobs and the economy

	Total (%)
<i>Unweighted n</i>	700
High priority	78
Medium priority	18
Low priority	3
Don't know	1

n. Drug abuse and addiction

	Total (%)
<i>Unweighted n</i>	700
High priority	76
Medium priority	15
Low priority	7
Don't know	1

8. The state of West Virginia provides many services and programs for its residents. Please tell me if it is important or not important to you that West Virginia continue to maintain the following state services and programs. Let's begin.... would you say that it is important or not important to you that West Virginia maintain [ITEM]? [IF 'IMPORTANT, READ: and is that very or somewhat? [IF 'NOT IMPORTANT, READ: and is that not too important or not at all important?]

a. State and local parks and recreation

	Total (%)
<i>Unweighted n</i>	700
Very important	35
Somewhat important	49
Not too important	9
Not at all important	5
Don't know	-

b. Home and community-based services for older West Virginians or people with disabilities (for example, meals on wheels, personal care assistance, transportation services, etc.)

	Total (%)
<i>Unweighted n</i>	700
Very important	71
Somewhat important	25
Not too important	3
Not at all important	-
Don't know	-

c. State and local infrastructure such as bridges and road maintenance and repair

	Total (%)
<i>Unweighted n</i>	700
Very important	71
Somewhat important	27
Not too important	2
Not at all important	-
Don't know	-

d. Health services for children and low-income families

	Total (%)
<i>Unweighted n</i>	700
Very important	73
Somewhat important	21
Not too important	4
Not at all important	2
Don't know	1

e. West Virginia public universities and colleges

	Total (%)
<i>Unweighted n</i>	700
Very important	45
Somewhat important	39
Not too important	10
Not at all important	6
Don't know	-

f. Public safety – fire, police, and other first responders

	Total (%)
<i>Unweighted n</i>	700
Very important	73
Somewhat important	23
Not too important	2
Not at all important	1
Don't know	-

g. K-12 public education

	Total (%)
<i>Unweighted n</i>	700
Very important	76
Somewhat important	17
Not too important	6
Not at all important	1
Don't know	-

9. Thinking about all taxpayers in West Virginia, please tell me if you think each of the groups (pay more than their fair share, less than their fair share, or about their fair share) in state income tax?

a. Low income families or individuals

	Total (%)
<i>Unweighted n</i>	700
More than fair share	28
Less than fair share	22
About fair share	50
Don't know	-

b. Middle income families or individuals

	Total (%)
<i>Unweighted n</i>	700
More than fair share	46
Less than fair share	4
About fair share	50
Don't know	-

c. High income families or individuals

	Total (%)
<i>Unweighted n</i>	700
More than fair share	15
Less than fair share	51
About fair share	34
Don't know	-

d. You and your family

	Total (%)
<i>Unweighted n</i>	700
More than fair share	41
Less than fair share	4
About fair share	56
Don't know	-

e. Local small businesses

	Total (%)
<i>Unweighted n</i>	700
More than fair share	41
Less than fair share	9
About fair share	50
Don't know	-

f. Large corporations

	Total (%)
<i>Unweighted n</i>	700
More than fair share	11
Less than fair share	66
About fair share	22
Don't know	-

10. In the last 12 months, or since last December, about how much have you heard, read, or seen about West Virginia's current tax system or any tax issues in the state – would you say a lot, some, not that much, or nothing at all?

	Total (%)
<i>Unweighted n</i>	700
A lot	16
Some	32
Not much	38
Nothing at all	13
Not sure	1
Refused	-

11. And in the past 12 months, or since last December, how much have you heard, read or seen about the reduction or elimination of the state income tax in West Virginia?

	Total (%)
<i>Unweighted n</i>	700
A lot	12
Some	29
Not much	24
Nothing at all	35
Not sure	-
Refused	-

12. The state is considering a proposal to gradually eliminate the state income tax for all West Virginians. While this could mean money back into the pockets of taxpayers, it could also reduce state revenue that is used to support critical state services and programs like health care, infrastructure, education, and public safety. Thinking about this, which of the following statements best represents your view? Do you think West Virginia should.....

	Total (%)
<i>Unweighted n</i>	700
Eliminate the state income tax and either [raise other state taxes] and/or [reduce spending on state programs and services] [REVERSE ORDER “raise other state taxes” AND “reduce spending on state programs and services” EVERY OTHER RESPONDENT]	14
Keep the state income tax but change the income tax rates so that lower and middle-income people pay less, and higher-income people pay more, OR	59
Keep the state income tax as it is - don’t increase taxes or reduce spending on state programs and services	27

13. [ASK IF Q12=a] You stated a preference for eliminating the state income tax and either [raising other state taxes] and/or [reducing spending on state programs and services] [SHOW SAME ORDER AS DISPLAYED IN PREVIOUS QUESTION]

Which statement best represents your view?

	Total (%)
<i>Unweighted n</i>	95
Raise other state taxes - don’t reduce spending on state programs and services	19
Reduce spending on state programs and services - don’t raise other state taxes	38
Do both - raise other state taxes and reduce spending on state programs and services	44

14. [IF Q13=b REDUCE SPENDING, READ: Even though you stated a preference for reducing spending rather than raising taxes] If West Virginia decided to eliminate the state income tax and raise other state taxes, please tell me if you would support or oppose each of the following options to fill the gap in revenue created by an elimination of the state's income tax....let's begin: Would you support or oppose...

a. Increasing the severance tax on coal and natural gas

	Total (%)
<i>Unweighted n</i>	700
Strongly support	16
Somewhat support	28
Somewhat oppose	13
Strongly oppose	44

b. Increasing the state sales tax

	Total (%)
<i>Unweighted n</i>	700
Strongly support	7
Somewhat support	29
Somewhat oppose	19
Strongly oppose	44

c. Adopting a sales tax on professional services such as legal and accounting services

	Total (%)
<i>Unweighted n</i>	700
Strongly support	5
Somewhat support	26
Somewhat oppose	30
Strongly oppose	37

d. Increasing the state gasoline tax

	Total (%)
<i>Unweighted n</i>	700
Strongly support	7
Somewhat support	5
Somewhat oppose	30
Strongly oppose	58

e. Increasing property taxes

	Total (%)
<i>Unweighted n</i>	700
Strongly support	3
Somewhat support	3
Somewhat oppose	6
Strongly oppose	92

f. Taxing recreational marijuana use if legalized

	Total (%)
<i>Unweighted n</i>	700
Strongly support	65
Somewhat support	10
Somewhat oppose	15
Strongly oppose	8

g. Adopting an estate tax

	Total (%)
<i>Unweighted n</i>	700
Strongly support	3
Somewhat support	16
Somewhat oppose	12
Strongly oppose	64

h. Increasing corporate income taxes

	Total (%)
<i>Unweighted n</i>	700
Strongly support	14
Somewhat support	39
Somewhat oppose	25
Strongly oppose	21

i. Adopting a luxury tax...for example on goods such as luxury boats, private jets, exotic sportscars, etc.

	Total (%)
<i>Unweighted n</i>	700
Strongly support	54
Somewhat support	19
Somewhat oppose	6
Strongly oppose	21

15. [IF Q13a, RAISE TAXES, READ: Even though you stated a preference for raising taxes rather than reducing spending] If West Virginia decided to eliminate the state income tax and reduce spending on state programs and services, please tell me if you would support or oppose each of the following options to fill the gap in revenue created by an elimination of the state's income tax....let's begin. Would you support or oppose the state reducing spending on...

a. State and local parks and recreation

	Total (%)
<i>Unweighted n</i>	18
Strongly support	7
Somewhat support	23
Somewhat oppose	7
Strongly oppose	58

b. Home and community-based services for older West Virginians or people with disabilities (for example, meals-on-wheels, personal care assistance, transportation services, etc.)

	Total (%)
<i>Unweighted n</i>	18
Strongly support	16
Somewhat support	6
Somewhat oppose	23
Strongly oppose	65

c. State and local infrastructure such as bridges and road maintenance and repair

	Total (%)
<i>Unweighted n</i>	18
Strongly support	9
Somewhat support	16
Somewhat oppose	10
Strongly oppose	65

d. Health services for children and low-income families

	Total (%)
<i>Unweighted n</i>	18
Strongly support	55
Somewhat support	15
Somewhat oppose	16
Strongly oppose	14

e. West Virginia public universities and colleges

	Total (%)
<i>Unweighted n</i>	18
Strongly support	21
Somewhat support	9
Somewhat oppose	55
Strongly oppose	16

f. Public safety – fire, police, and other first responders

	Total (%)
<i>Unweighted n</i>	18
Strongly support	20
Somewhat support	4
Somewhat oppose	16
Strongly oppose	60

g. K-12 public education

	Total (%)
<i>Unweighted n</i>	18
Strongly support	16
Somewhat support	51
Somewhat oppose	20
Strongly oppose	13

Demographics

D1. A family caregiver is someone who provides UNPAID care for an older parent, spouse or other adult loved one who is ill, frail, elderly, or has a physical, mental, or emotional disability. This UNPAID care may include assisting with personal needs like bathing and dressing, household chores, meals, shopping, transportation, or managing finances, paperwork, or medical care.

a. Are you now or have you ever been a family caregiver – which means you provided UNPAID care to an adult loved one?

	Total (%)
<i>Unweighted n</i>	700
Yes	50
No	50
Not sure	-
Refused	-

b. [If yes to D1a] As a family caregiver, have you ever incurred any of the following expenses for the following services to help care for your loved one?

Percentage Saying Yes	Total (%)
<i>Unweighted n</i>	397
Making modifications to your or your loved one's home	66
Purchasing equipment like a wheelchair, hearing aids, vision aids, or wearable devices.	66
Hiring a home health aide or personal care attendant	36
Using respite care to get a break from your caregiving responsibilities	26
Using adult day care	12
Transporting your loved one to where they need to go	89

D2. Which of the following best describes your current employment status? Are you...?

	Total (%)
<i>Unweighted n</i>	700
Self-employed full-time	6
Self-employed part-time	4
Employed full-time	33
Employed part-time	6
Retired and not working at all	35
Unemployed and looking for work	3
Or are you not in the labor force for other reasons	10
Not sure [DO NOT READ]	1
Refused [DO NOT READ]	1

D3. What is the highest level of education that you completed?

	Total (%)
<i>Unweighted n</i>	700
0-12 th grade (no diploma)	8
High school graduate or equivalent	31
Post-high school education (no degree)	9
2-year college degree	16
4-year college degree	12
Post-graduate study (no degree)	6
Graduate or professional degree	16
Not sure [DO NOT READ]	2
Refused [DO NOT READ]	2

D4. What is your current marital status?

	Total (%)
<i>Unweighted n</i>	700
Married	68
Not married but living with your partner	2
Separated	-
Divorced	7
Widowed	7
Single and never married	14
Not sure [DO NOT READ]	-
Refused [DO NOT READ]	1

D5. [ASK ONLY IF MARRIED OR LIVING WITH PARTNER] Are you or your spouse or partner currently a member of A-A-R-P?

	Total (%)
<i>Unweighted n</i>	490
Yes	27
No	71
Not sure [DO NOT READ]	1
Refused [DO NOT READ]	-

D6. Are you of Hispanic, Spanish, or Latino origin or descent?

	Total (%)
<i>Unweighted n</i>	700
Yes	1
No	97
Not sure [DO NOT READ]	-
Refused [DO NOT READ]	2

D7. What is your race? Are you...

	Total (%)
<i>Unweighted n</i>	700
White or Caucasian	92
Black or African American	2
American Indian or Alaska Native	1
Asian	-
Native Hawaiian or other Pacific Islander	-
Something else [DO NOT READ]	2
Not sure [DO NOT READ]	-
Refused [DO NOT READ]	3

D8. Do you consider yourself to be a ...?

	Total (%)
<i>Unweighted n</i>	700
Democrat	37
Republican	38
Independent	25
Something else? [RECORD ANSWER]	-
Not sure [DO NOT READ]	-
Refused [DO NOT READ]	-

D9. How would you characterize your political views?

	Total (%)
<i>Unweighted n</i>	700
Very conservative	21
Somewhat conservative	28
Moderate	24
Somewhat liberal	16
Very liberal	6
None of the above/something else [DO NOT READ]	1
Not sure [DO NOT READ]	3
Refused [DO NOT READ]	2

D10. We realize income is a private matter and so rather than ask you anything specific about your income, I'd like to ask you to please stop me when I get to the category that includes your household's income before taxes in 2020. First, was your household income less than \$60,000 or \$60,000 or more?

	Total (%)
<i>Unweighted n</i>	700
Less than \$60,000.00	48
\$60,000 or more	45
Not sure	1
Refused	6

a. [IF LESS THAN \$60,000, READ]: so was it.....

	Total (%)
<i>Unweighted n</i>	337
Less than \$10,000	10
\$10,000 to less than \$20,000	13
\$20,000 to less than \$30,000	18
\$30,000 to less than \$40,000	27
\$40,000 to less than \$50,000	17
\$50,000 to less than \$60,000	10
Not sure [DO NOT READ]	2
Refused [DO NOT READ]	3

b. [ASK ONLY IF QD10=b, \$60,000 or more]: so was it.....

	Total (%)
<i>Unweighted n</i>	264
\$60,000 to less than \$75,000	26
\$75,000 to less than \$100,000	31
\$100,000 to less than \$125,000	22
\$125,000 or more	16
Not sure [DO NOT READ]	1
Refused [DO NOT READ]	3

D11. To ensure it is recorded accurately, could you please state your gender?

	Total (%)
<i>Unweighted n</i>	700
Male	49
Female	51
Other	-

For more information about this survey or the methodology, please contact Jennifer Sauer, AARP Research, at jsauer@aarp.org

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