



PUBLIC OPINION STRATEGIES

Montana Business Survey

Interview Schedule

Public Opinion Strategies

August-September 2013

N=200 Business Owners/Operators

(5+ employees, 30 years or less in operation)

Margin of Error: $\pm 6.93\%$

* Denotes result less than 0.5%.

^ Denotes rounding. Due to rounding, some figures may be higher or lower by less than one-half of one percent.

First, thinking about your company –

B. How many total full-time personnel are currently employed by your business, including yourself?
(DO NOT READ - CODE TO CATEGORY)

52%	5-9
28%	10-19
16%	20-49
2%	50-99
3%	100+

C. Which one of the following best describes your function at the company?

28%	CEO, President
26%	Owner
22%	Vice President or Senior Manager
14%	Part-owner/Partner
6%	CFO or finance officer
2%	Senior level legal department staff member
3%	OTHER (Specify)

D. Please confirm that you work for a private company or business, and you are not a federal, state, or local government employee, or non-profit employee?

100% YES, PRIVATE COMPANY

E. How many years has your business been in operation?

10%	5 Years or less
23%	6-10 Years
22%	11-15 Years
24%	16-20 Years
13%	21-25 Years
10%	26+ Years

15.2 MEAN

F. How long have you been in a management position with this company? **(RECORD EXACT RESPONSE)**

32%	5 Years or less
24%	6-10 Years
16%	11-15 Years
16%	16-20 Years
9%	21-25 Years
5%	26+ Years

11.0 MEAN

Thinking about the economy and comparing this year to last year...

1. Would you say the economy in Montana is **(ROTATE FIRST TWO CHOICES)**

42%	Getting better
12%	Getting worse
	...or...
46%	Staying about the same?
2%	Don't Know (DO NOT READ)
-	Refused (DO NOT READ)

2. I'm going to read you a pair of statements, and please tell me which one comes closest to your own views, even if neither of the statements matches your views exactly. **(ROTATE PUNCHES 1 AND 2)**

73% We can protect land and water and have a strong economy with good jobs at the same time, without having to choose one over the other.

... or ...

22% Sometimes protections for land and water and a strong economy are in conflict and we must choose one over the other.

1% BOTH **(DO NOT READ)**
3% NO OPINION/UNSURE **(DO NOT READ)**
2% REFUSED **(DO NOT READ)**

Now thinking about your business...

3. From a financial perspective, how do you feel right now about the future for your business ... **(ROTATE TOP TO BOTTOM, BOTTOM TO TOP)**

53% Very confident
39% Somewhat confident
7% Not very confident
...or...
2% Not at all confident

– Don't Know **(DO NOT READ)**
– Refused **(DO NOT READ)**

91%^A TOTAL CONFIDENT
9% TOTAL NOT CONFIDENT

SPLIT SAMPLED

4. What do you believe is the biggest issue or challenge facing your business today? **(PROBE AND CLARIFY)** Anything else?

SEE VERBATIM COMMENTS

5. And in the last two or three years, have you hired additional employees?

73% Yes
28% No

- Don't Know (**DO NOT READ**)
 - Refused (**DO NOT READ**)
-

ASKED IF YES, HAVE HIRED, N=145

6. And, how many employees have you hired? (**RECORD EXACT RESPONSE. USE 999 FOR DK/REF**)

<u>Hired</u>	<u>Total</u>	
32%	23%	1-2
33%	24%	3-5
29%	21%	6+
6%	5%	DON'T KNOW/REFUSED
10.6	10.6	MEAN

7. In the next two to three years, do you plan to hire additional employees?

58% Yes
30% No

- 13% Not Sure/Don't Know (**DO NOT READ**)
 - Refused (**DO NOT READ**)
-

Now, there are a number of factors that businesses have shared with us that have been important considerations in deciding where to locate or expand their business. For each of the following please indicate if as far as you know, this was a significant factor, somewhat of a factor ...or... not really a factor in your business being located in Montana. **(RANDOMIZE)**

	Total Factor	Significant Factor	Somewhat Factor	Not Really A Factor	Doesn't Apply To Company	Don't Know	Refused
8. Ability to attract and retain employees	61%[^]	37%	25%	38%	1%	1%	—
9. Access to raw materials	24%[^]	10%	15%	70%	5%	1%	1%
10. Presence of public lands like national forests, national parks, and wildlife refuges, and access to rivers and trails	53%	30%	23%	45%	3%	—	—
11. Amount of government regulations	56%	29%	27%	41%	2%	1%	1%
12. Tax rates	50%	25%	25%	47%	2%	2%	1%
13. Utility costs	40%	14%	26%	57%	2%	2%	—
14. The Montana outdoor lifestyle	70%	44%	26%	28%	3%	—	—
15. Presence of quality health care providers	42%	16%	26%	57%	1%	1%	—
16. Frequency and consistency of airline service	34%	13%	21%	65%	2%	—	—
17. Access to high-speed internet	54%[^]	29%	26%	43%	2%	1%	—

Summary of Reasons To Locate/Expand In Montana - Ranked By % Significant Factor

Reasons to Locate/Expand in Montana	% Significant Factor	% Total Factor
The Montana outdoor lifestyle	44%	70%
Ability to attract and retain employees	37%	61%
Presence of public lands like national forests, national parks, and wildlife refuges, and access to rivers and trails	30%	53%
Amount of government regulations	29%	56%
Access to high-speed internet	29%	54%
Tax rates	25%	50%
Presence of quality health care providers	16%	42%
Utility costs	14%	40%
Frequency and consistency of airline service	13%	34%
Access to raw materials	10%	24%

SPLIT SAMPLED / ASKED IF PUBLIC LANDS A FACTOR

18. What about the presence of public lands was a factor in your business being located in Montana? **(PROBE & CLARIFY)** Anything else?

SEE VERBATIM COMMENTS

Along similar lines, when you think about your business' ability to attract and retain employees, other than compensation and benefits, please think about what has been important and rate each of the following factors as a significant factor in your business' ability to attract and retain employees, somewhat of a factor or not a factor. **(RANDOMIZE)**

	Total Factor	Significant Factor	Somewhat Factor	Not A Factor	Doesn't Apply To Company	Don't Know	Refused
19. Vacation and paid time off	70%	28%	42%	29%	1%	–	1%
20. Career advancement opportunities	67%^	19%	49%	33%	1%	–	–
21. Company's reputation	91%	63%	28%	10%	–	–	–
22. Challenging work	77%	34%	43%	23%	–	1%	–
23. Caliber of co-workers	87%^	54%	34%	13%	–	1%	–
24. Quality of life in the community	88%	59%	29%	12%	1%	–	–
25. Recognition and rewards at work	81%	39%	42%	18%	–	1%	–

Summary of Employee Attraction/Retention Factors - Ranked By % Significant Factor

Employee Attraction/Retention Factors	% Significant Factor	% Total Factor
Company's reputation	63%	91%
Quality of life in the community	59%	88%
Caliber of co-workers	54%	87%
Recognition and rewards at work	39%	81%
Challenging work	34%	77%
Vacation and paid time off	28%	70%
Career advancement opportunities	19%	67%

Thinking about one of these issues specifically - the presence of public lands, rivers, natural areas and the outdoors in Montana -

26. Please indicate how much the presence of public lands like national forests, national parks, and wildlife refuges affects you and your business overall, using a scale where 0 means it does NOT affect your company at all, 100 means it affects your company A LOT, and 50 is neutral. Of course, you can pick any number in between 0 and 100.

23% 0-24
11% 25-49
33% 50-74
34% 75+

- DON'T KNOW/REFUSED

51.5 MEAN

SPLIT SAMPLED, N=152

27. How much do you think the presence of public lands like national forests, national parks, and wildlife refuges contributes to the quality of life and outdoor lifestyle in Montana? **(ROTATE)**

80% A lot
13% Some
3% Not much
3% Not at all

1% Don't Know **(DO NOT READ)**
1% Refused **(DO NOT READ)**

93% TOTAL A LOT/SOME
5%^ TOTAL NOT MUCH/NOT AT ALL

For each of the following, please tell me if you agree or disagree with that particular statement.

(IF AGREE/DISAGREE:) And do you **STRONGLY** (agree/disagree) with that or just **SOMEWHAT** (agree/disagree) with that?

The (first/next) one is... **(RANDOMIZE)**

	Total Agree	Total Disagree	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know	Ref
Q28-29 SPLIT SAMPLED								
28.	89%	10%	72%	17%	5%	5%	1%	—
29.	95%	5%	73%	22%	4%	1%	—	—
30.	74%	24%^	37%	37%	14%	11%	3%	—
<hr/>								
31.	Next, please indicate which of the following statements comes closer to your opinion. (ROTATE)							
76%	Public lands like national parks and national forests in Montana are generally good for the state - they support our economy; provide opportunities to hunt, fish, and enjoy the outdoors; and enhance our overall quality of life							
	... OR ...							
17%	Public lands like national parks and national forests in Montana are generally bad for the state - they take land off the tax rolls and prevent opportunities for logging and oil and gas development that could provide jobs for Montanans							
4%	BOTH (DO NOT READ)							
2%	NO OPINION/UNSURE (DO NOT READ)							
2%	REFUSED (DO NOT READ)							

And, now, a few more questions for statistical purposes only...

D1. In what year were you born?

14%	18 - 34
21%	35 - 44
31%	45 - 54
35%	55 AND ABOVE
–	REFUSED

D2. And in politics today, do you consider yourself... **(ROTATE)**
a Republican, a Democrat, or something else?

(IF REPUBLICAN OR DEMOCRAT, ASK:) Would you call yourself a STRONG
(REPUBLICAN/DEMOCRAT) or a NOT-SO-STRONG (REPUBLICAN/DEMOCRAT)?

(IF SOMETHING ELSE, ASK:) Do you think of yourself as closer **(ROTATE)** to the Republican
...or... to the Democratic party?

26%	STRONG REPUBLICAN
13%	NOT-SO-STRONG REPUBLICAN
11%	LEAN TO REPUBLICANS
30%	SOMETHING ELSE/INDEPENDENT
7%	LEAN TO DEMOCRATS
5%	NOT-SO-STRONG DEMOCRAT
3%	STRONG DEMOCRAT
1%	DON'T KNOW (DO NOT READ)
6%	REFUSED (DO NOT READ)
50%	TOTAL REPUBLICAN
14%[^]	TOTAL DEMOCRAT

D3. GENDER

60%	MALE
41%	FEMALE

SPLIT SAMPLED

32. And finally ... One focus of this survey has been on public lands and the presence of them in Montana...thinking about this some more, please tell me what advice, comment, or opinion you would give your elected officials about public lands in Montana. **(PROBE & CLARIFY)** Anything else?

SEE VERBATIM COMMENTS

D4. Industry - Recorded from sample by SIC Code

38%	Services
25%	Retail Trade
11%	Manufacturing
10%	Construction
5%	Finance, Insurance & Real Estate
5%	Wholesale Trade
4%	Agriculture, Forestry & Fishing
4%	Transportation & Public Utilities
1%	Mining
-	Public Administration

D5. Sales Volume - Recorded from sample

68%	Under \$1 million
27%	\$1 million - \$4.9 million
5%	\$5 million+
