



# MOORE INFORMATION

OPINION RESEARCH • STRATEGIC ANALYSIS

December 13, 2017

TO: Bridger Mahlum

FROM: Erik Iverson

RE: Montana Voter Survey Results: November 2017

*Methodology: A total of 800 telephone interviews were conducted November 11-16, 2017 among a representative sample of registered voters in Montana. Interviews were conducted using live interviewers and included landline and cell phones. The sampling error is plus or minus 3% at the 95% confidence level.*

## SUMMARY & HIGHLIGHTS

### Perceptions of Montana Organizations

Business organizations like Montana's Chamber of Commerce continue to be well-regarded by voters throughout the state (68% favorable/14% unfavorable). Voters are less positive about environmental groups like Montana Conservation Voters (48/32%) and labor unions like the AFL-CIO (40/29%). Voters are least familiar and least impressed with Montana trial lawyers (29/25%). Sentiment regarding each of these groups today is similar to 2016 surveys.

When voters are asked to describe how much influence they believe these same organizations should have over public policy decisions in the state, the plurality of voters are satisfied with the current level of influence of business organizations like the Chamber (41% right amount), while those who prefer the Chamber's level of influence change are divided about how (24% want more influence, 23% want less influence). At the same time, pluralities of voters with an opinion about how much influence labor unions, environmental groups and trial lawyers should have say they would like to see each of these groups have less influence on public policy decisions in the state.

The Chamber also continues to be the most positively viewed organization when voters are asked about candidate endorsements. Specifically, a candidate endorsed by the Montana Chamber of Commerce is most popular (for 36%), followed by a candidate endorsed by environmental groups (23%) or by labor unions (16%). Just 4% say they would most likely vote for a candidate endorsed by trial lawyers.

### Perceptions of Montana Businesses

Voters hold Montana's businesses in high regard, as evidenced by the following findings:

- Nearly seven-in-ten (68%) say the state's business community deserves the most credit for economic growth, while just 19% would attribute this growth to public officials.
- Majorities of voters trust that Montana businesses can be expected to do the right thing to protect the environment and treat their workers fairly when it comes to workplace benefits.

- Additionally, 56% believe “businesses can be trusted to take good care of the state’s natural resources and the government should intervene only in the worst cases.” By contrast, 40% say “many businesses will cut corners and damage the environment unless strong government rules and regulations are in place.”
- Montanans are more than twice as likely to “trust businesses to follow the rules set for them” than they are to believe “businesses can’t be trusted to follow rules” (65-29%).
- Fully 77% say businesses get things done more efficiently than government.

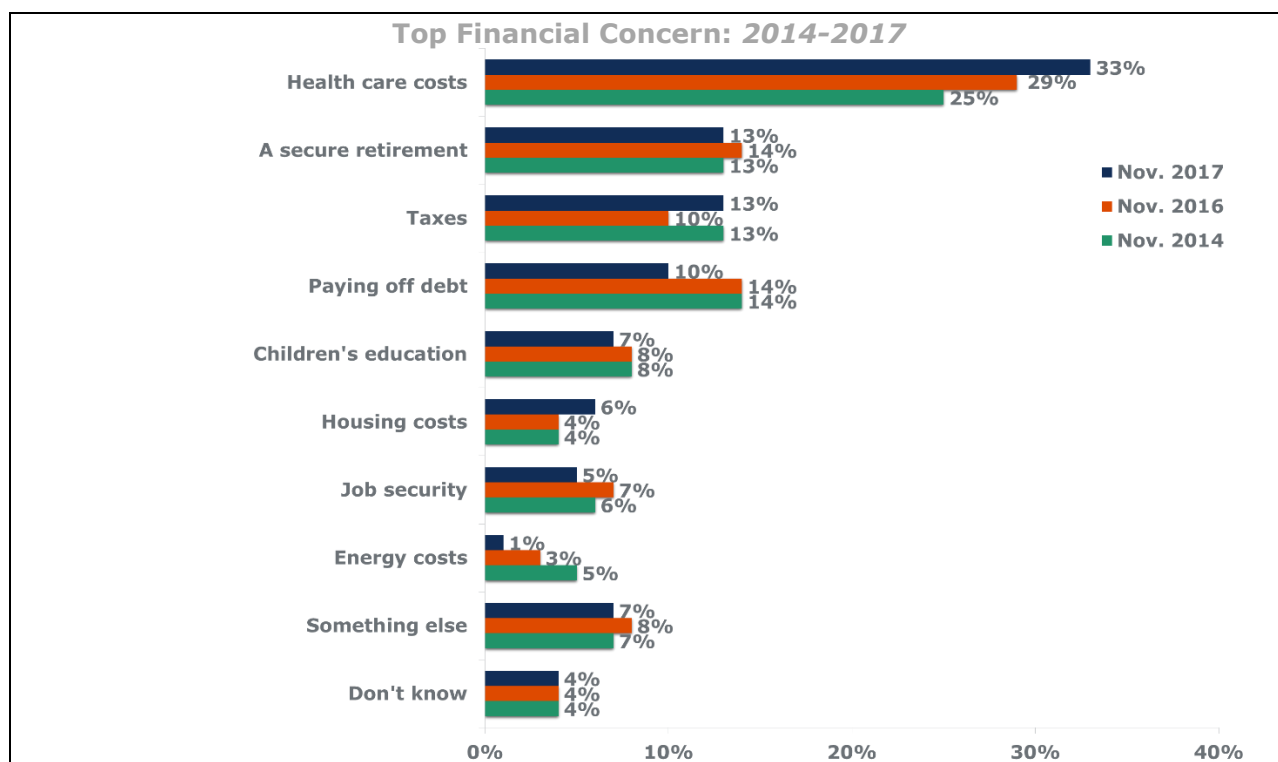
### **Other Issues**

- Health care costs are the top financial concern for Montana voters today and have been consistently since 2009.
- Looking at voters’ priorities for the next legislative session, controlling government spending (22%), improving access to health care (20%) and increasing education funding (16%).
- There is wide support for mining among seven-in-ten voters (70% support mining in Montana, 22% oppose mining, 8% don’t know).
- Today 43% are aware of the Black Butte Copper Project and among those voters, the project enjoys a 53-33% margin of support. Support among voters who are unaware or opposed to the project reaches 61% upon learning about water degradation standards for quality and quantity to protect the environment.
- Coal-fired electricity generation is supported by 58% of voters and opposed by 35%. Support for state action to curb environmental lawsuits/out-of-state legislation to protect Colstrip’s operations stands at 53% after voters learn about the potential for significant job loss and economic damage. Furthermore, 63% say Montana’s Senators and Congressman should support pending legislation to promote Colstrip investment and CCS retrofitting.
- Montana voters remain nearly universal (90%) in their agreement that “holding Montana’s public schools to high academic standards is an essential component of ensuring that Montana children remain competitive in a global economy.”

More details follow.

**Financial Concerns**

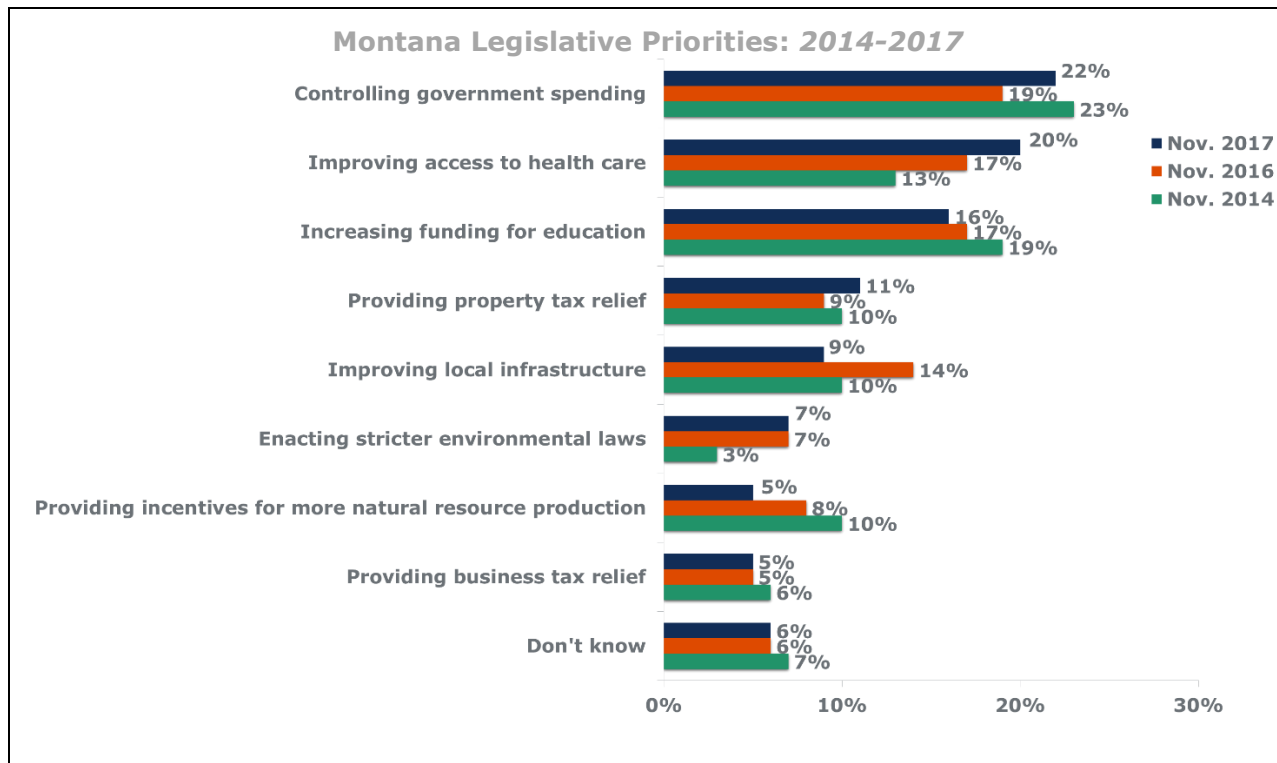
Today, health care costs remain the top financial/pocketbook concern for Montana voters (33%), followed by ensuring a secure retirement (13%) and taxes (13%). Pocketbook concerns today are statistically unchanged from the November 2016 and 2014 surveys. Looking back even farther, we find health care costs have consistently been the top financial/pocketbook concern for Montanans since 2009.



Looking at subgroups, some of the biggest differences in financial concerns are seen by age. Voters age 18-44 are equally concerned with health care costs and paying off debt, but voters age 45 and older are most likely to be concerned with health care costs. We also find that concerns about a secure retirement increase along with age. Looking at partisan vote behavior, health care costs are the top pocketbook concern for Republicans, Democrats and Independents alike. Though not the top concern, taxes are more likely to be a concern for Republicans than Democrats or Independents, while Republicans and Independents are more concerned than Democrats with paying off debt.

**Legislative Priorities**

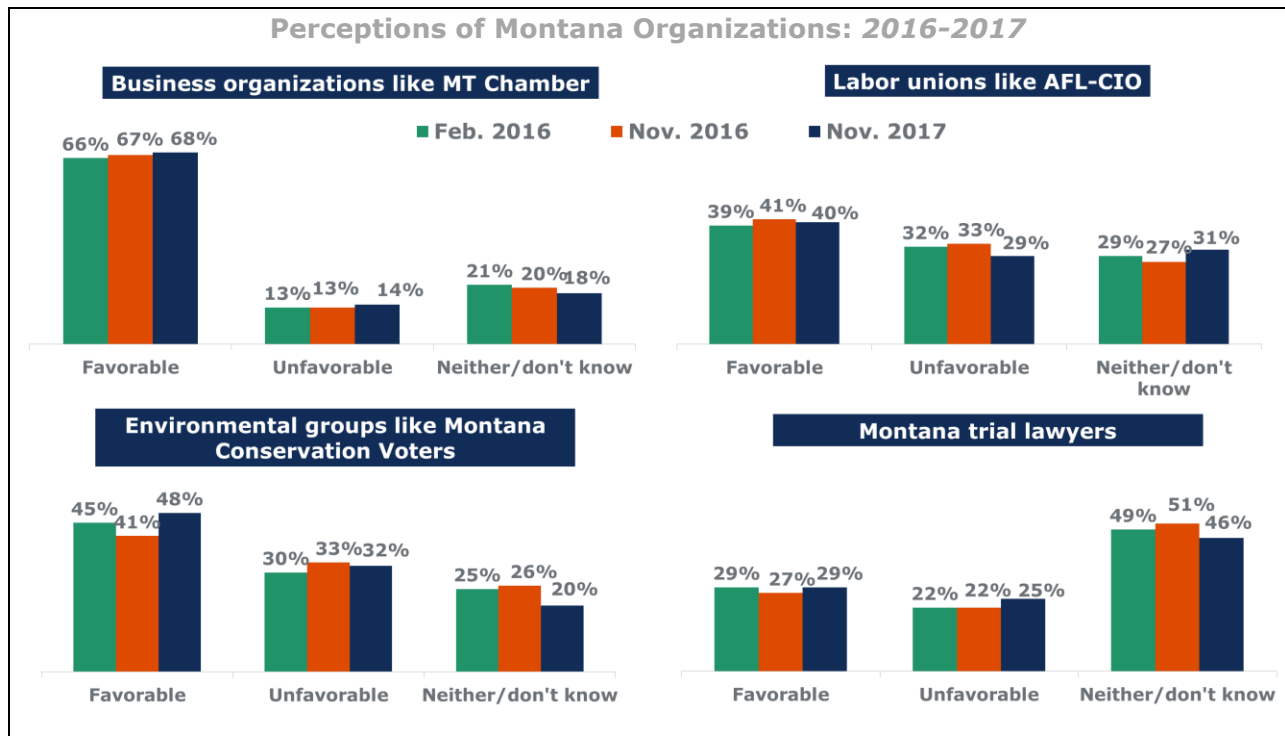
Looking at voters' priorities for the next legislative session, we find no consensus priority, with controlling government spending (22%), improving access to health care (20%) and increasing education funding (16%) at the top of the list. Fewer voters place highest priority on property tax relief (11%), improving local infrastructure (9%), enacting stricter environmental laws (7%), incentives for natural resource production (5%) and business tax relief (5%).



By party, Republicans want the legislature to focus on controlling government spending, but Democrats' top priorities are improving access to health care and increasing education funding. There is no consensus among Independents, but the top three priorities are government spending, health care and education.

### Perceptions of Organizations

Voters continue to hold "business organizations like the Montana Chamber of Commerce" in high regard (68% favorable/14% unfavorable today, compared to 67/13% in November 2016). Voters are also positive, but not nearly as widely, about "environmental groups like Montana Conservation Voters" (48/32%) and the Montana AFL-CIO (40/29%). Voters are not as likely to have an opinion about trial lawyers and those with an opinion are only lukewarm, just as they were in 2016 (29% favorable, 25% unfavorable, 46% neither/don't know today).



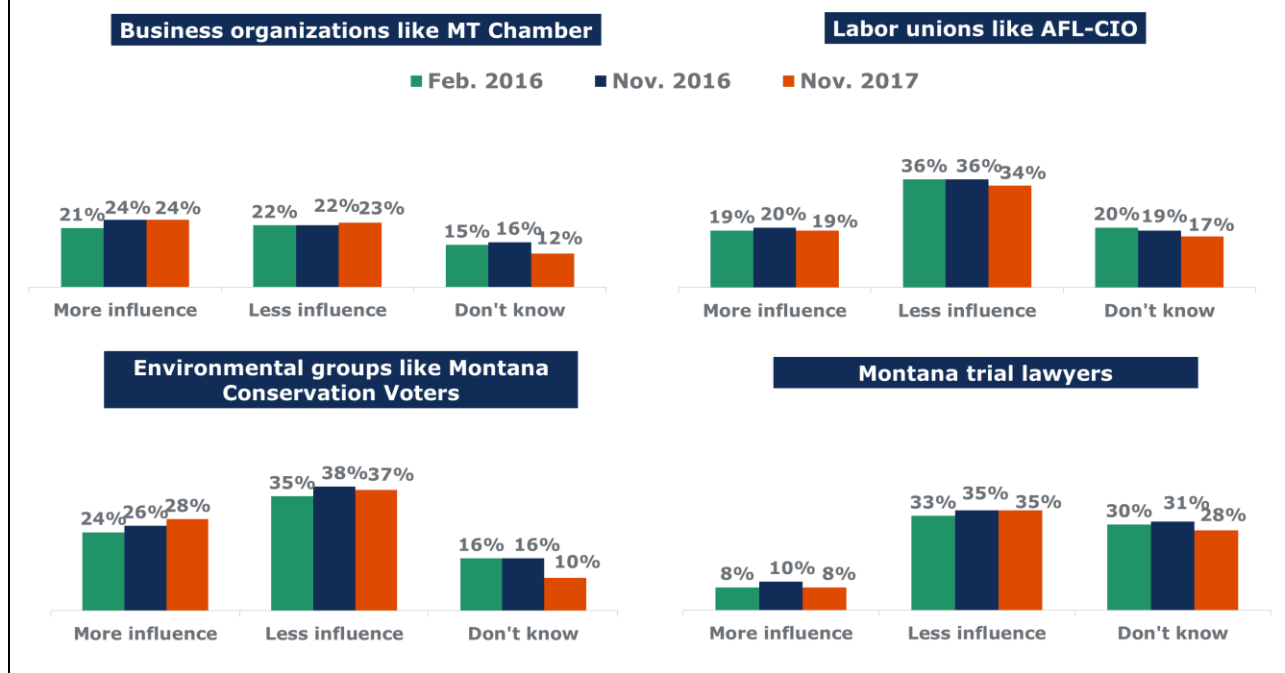
Looking at key subgroups:

- **Business organizations:** Majorities among all key subgroups are favorable.
- **Environmental groups:** Stark partisan differences; the majority of Republicans are unfavorable, but a wide majority of Democrats favorable, as are a plurality of Independents. There is also a gender gap, with a majority of women favorable and men divided.
- **Labor unions:** As with environmental groups, we see partisan differences, with a majority of Republicans unfavorable, but a wide majority of Democrats favorable. Independents with an opinion are 3:2 favorable. There is also a gender gap, with a plurality of women favorable, but men are divided.
- **Trial lawyers:** No key subgroup reaches 35% favorable and pluralities/majorities of many subgroups have no opinion.

When it comes to public policy decisions in Montana, voters remain more satisfied with the level of influence business organizations like the Montana Chamber of Commerce have. Today, 41% say business groups like the Chamber have the “right amount” of influence, while 24% would like to see more influence and 23% would like to see less. This sentiment is statistically unchanged from the 2016 surveys.

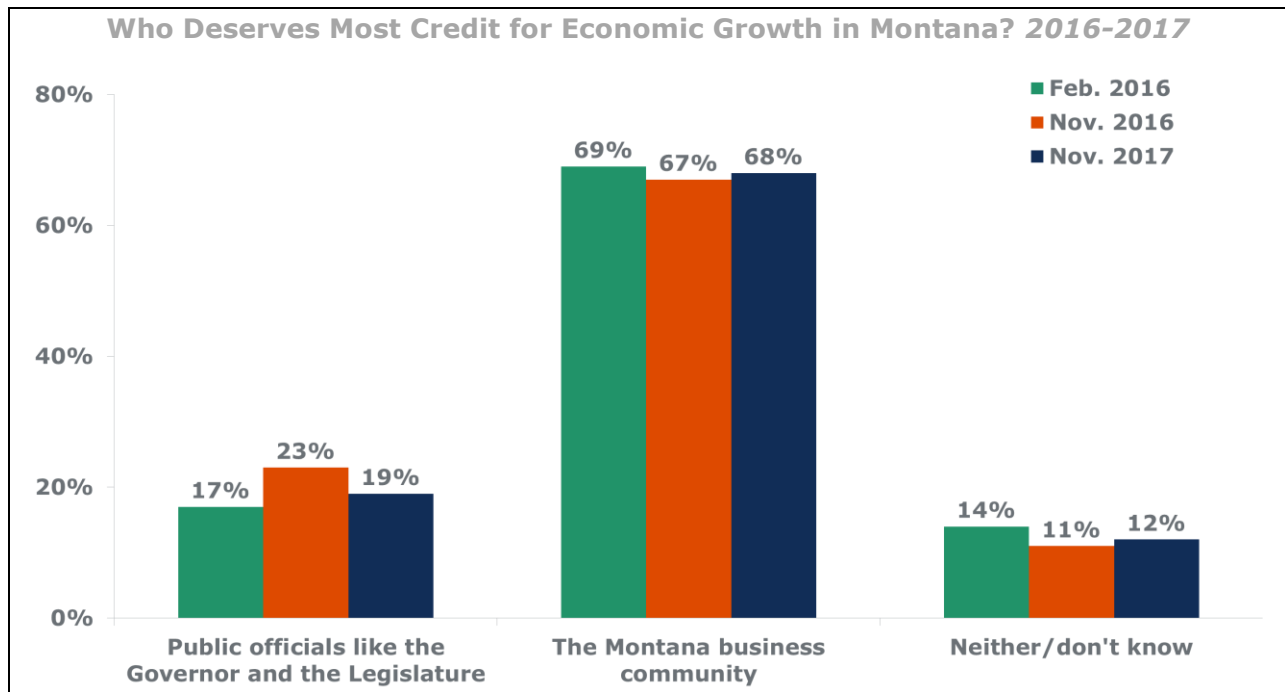
Further, as was the case in 2016, Montana voters would like to see less influence from labor unions, environmental groups and the trial lawyers, as shown in the following table.

**Comparing More and Less Influence of Organizations on Public Policy: 2016-2017**



**Economic Growth**

There continues to be widespread consensus among Montanans that the state’s business community deserves the most credit for economic growth (68%), while 19% would attribute economic growth to public officials, like the Governor and State Legislature. The remaining 12% of voters say neither should get credit, or have no opinion. Sentiment on this question was similar in 2016, as shown in the following table.



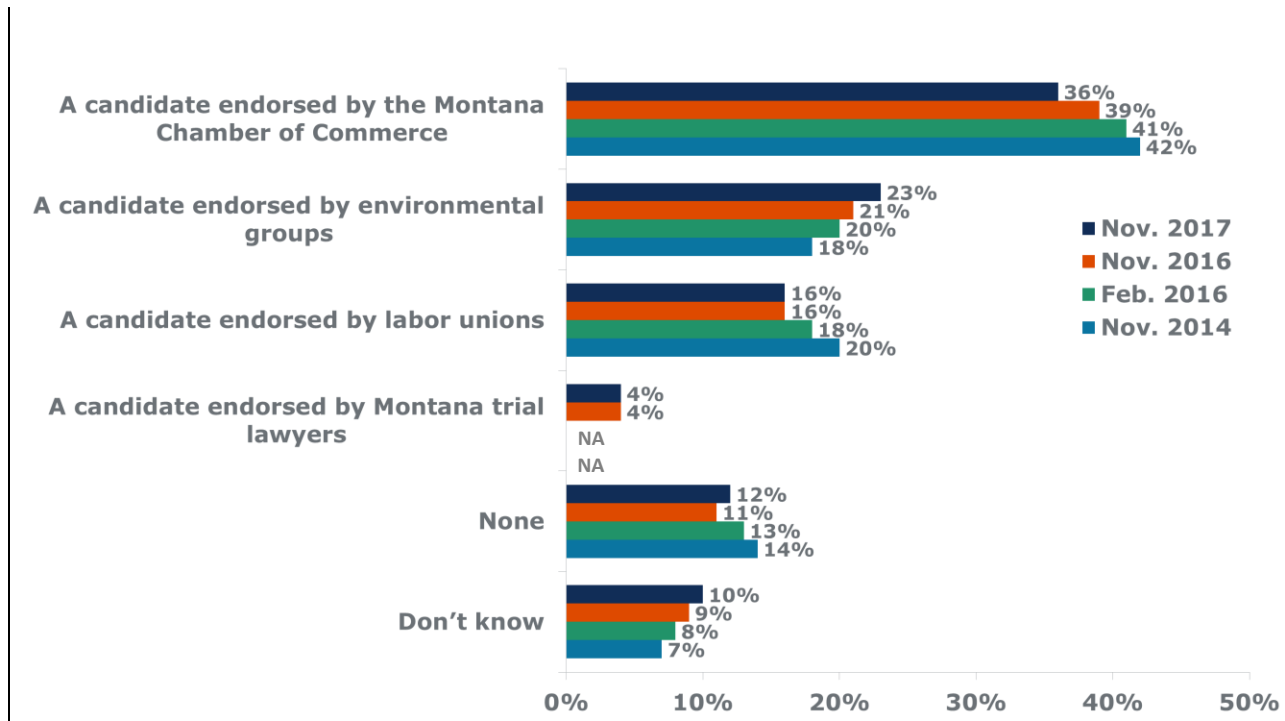
Wide majorities of voters throughout Montana and among all key subgroups credit the business community for economic growth in the state.

### Candidate Preference

As in November 2016, voters were asked which one of four candidates they are more likely to vote for. A candidate endorsed by the Montana Chamber of Commerce is most popular (for 36%), followed by a candidate endorsed by environmental groups (23%), a candidate endorsed by labor unions (16%) and a candidate endorsed by the Montana trial lawyers (4%). Another 12% say none and 10% don't have an opinion on the matter. These results are in line with the November 2016 data.

In the November 2014 and February 2016 surveys, we did not give the option of "a candidate endorsed by Montana trial lawyers." As a result, those results are not directly comparable to this recent data. However, sentiment was similar when just three potential candidate endorsements were offered (as shown in the following table).

### Impact of Candidate Endorsements: 2014-2017



Among Republicans, a Chamber-endorsed candidate is widely preferred (by 56%). Among Independents, 34% prefer a Chamber candidate over an environmental group candidate (16%), but many Independents (35%) had no opinion on this question. Democrats are most likely to prefer a candidate endorsed by environmental groups (44%), followed by labor unions (29%).

Interestingly, among voters in union households, 30% say they would vote for a labor union candidate, but an equal percentage (30%) would vote for a Chamber-endorsed candidate.

**Perceptions of Montana Businesses**

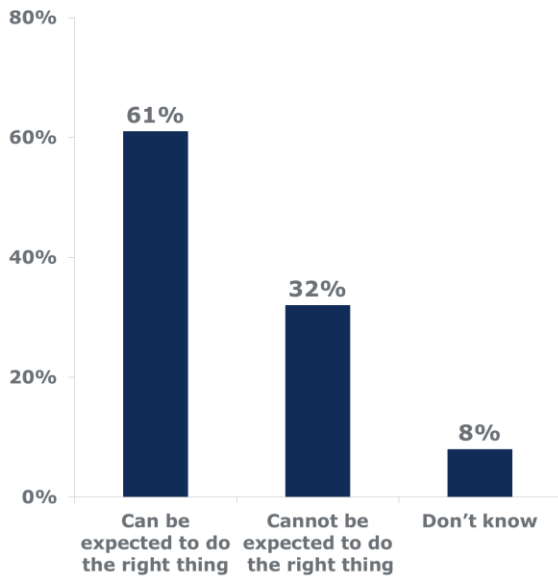
Today, 61% believe business and industry in Montana can be expected to do the right thing when it comes to “protecting the environment,” while 32% disagree.

In addition, by a 63-29% margin, voters believe Montana businesses can be expected to do the right thing when it comes to “treating workers fairly when deciding on health care coverage, retirement and other workplace benefits.”

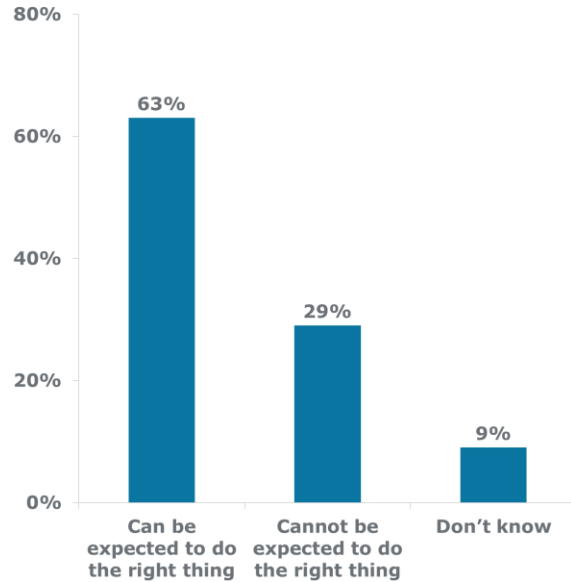


## Montana Businesses Can Be Trusted to Do Right Thing: 2017

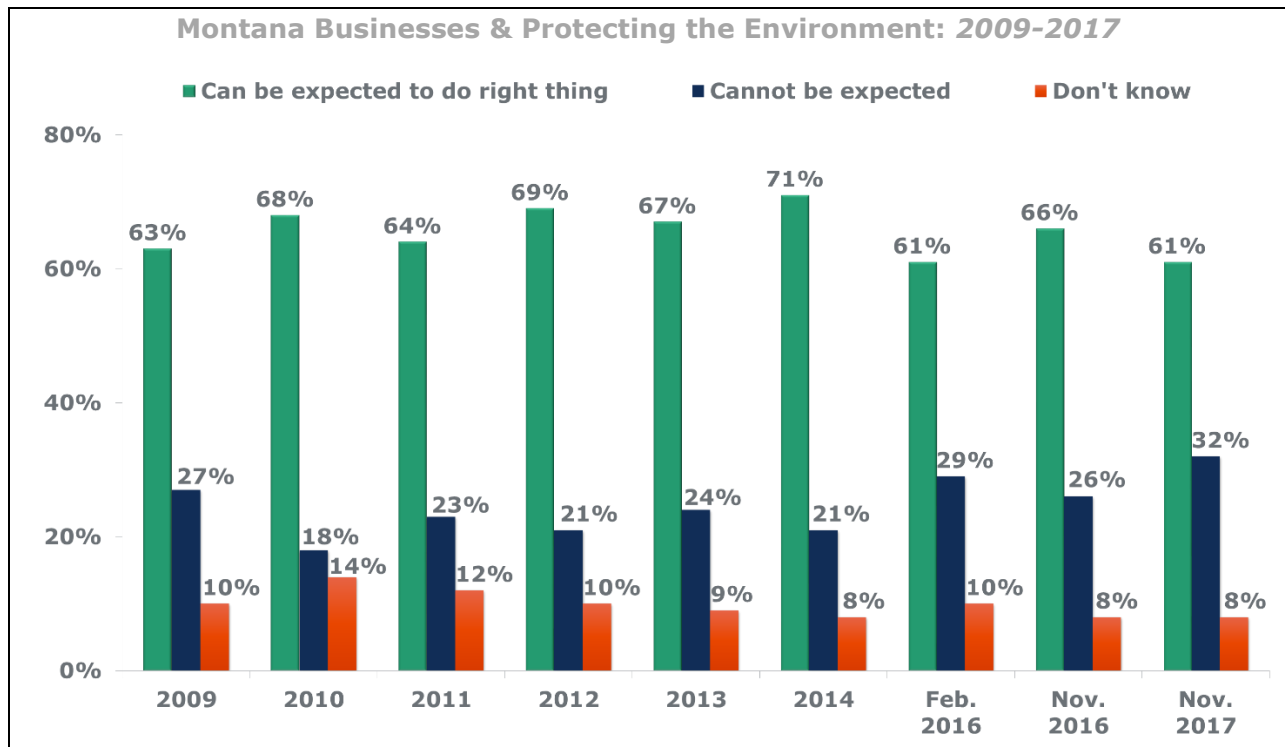
"Thinking about business and industry in Montana, do you think Montana businesses can or cannot be expected to do the right thing **when it comes to protecting the environment?**" (Q13)



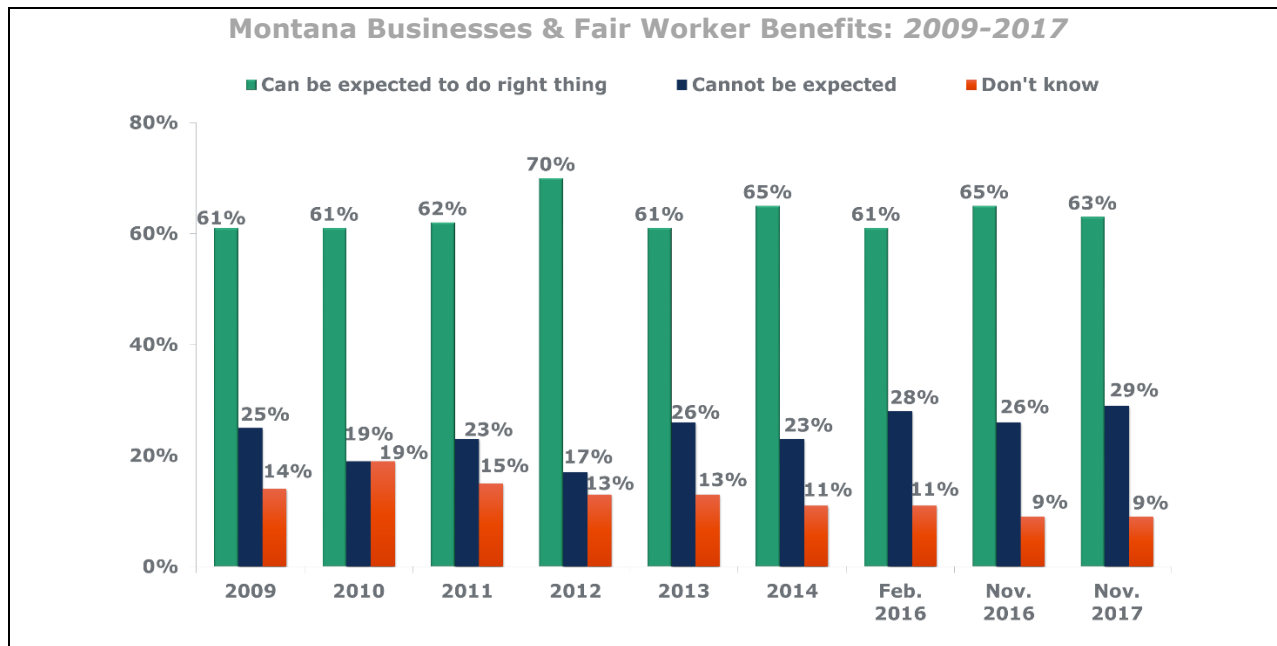
"Thinking about business and industry in Montana, do you think Montana businesses can or cannot be expected to do the right thing **when it comes to treating workers fairly when deciding on health care coverage, retirement and other workplace benefits?**" (Q14)



Looking back at survey results since 2009, we find more than three-in-five voters have consistently said they believe Montana businesses can be trusted to do the right thing when it comes to protecting the environment. Current findings mirror the February 2016 survey – the low point (61% expect businesses to do the right thing), but are lower than the November 2016 results (66% do the right thing). Overall, the average percentage of voters who expect businesses to do the right thing between 2009 and today is 66%.



Regarding treating workers fairly when deciding on health care coverage, retirement and other workplace benefits, in each survey since 2009 (including in the current survey), more than three-in-five voters believe Montana businesses can be expected to do the right thing in these instances, and current sentiment is in line with what we have seen historically (63% can be expected to do the right thing). Further, current results are similar to the average sentiment between 2009 and November 2016 – 63% expect businesses to do the right thing for fair workers.

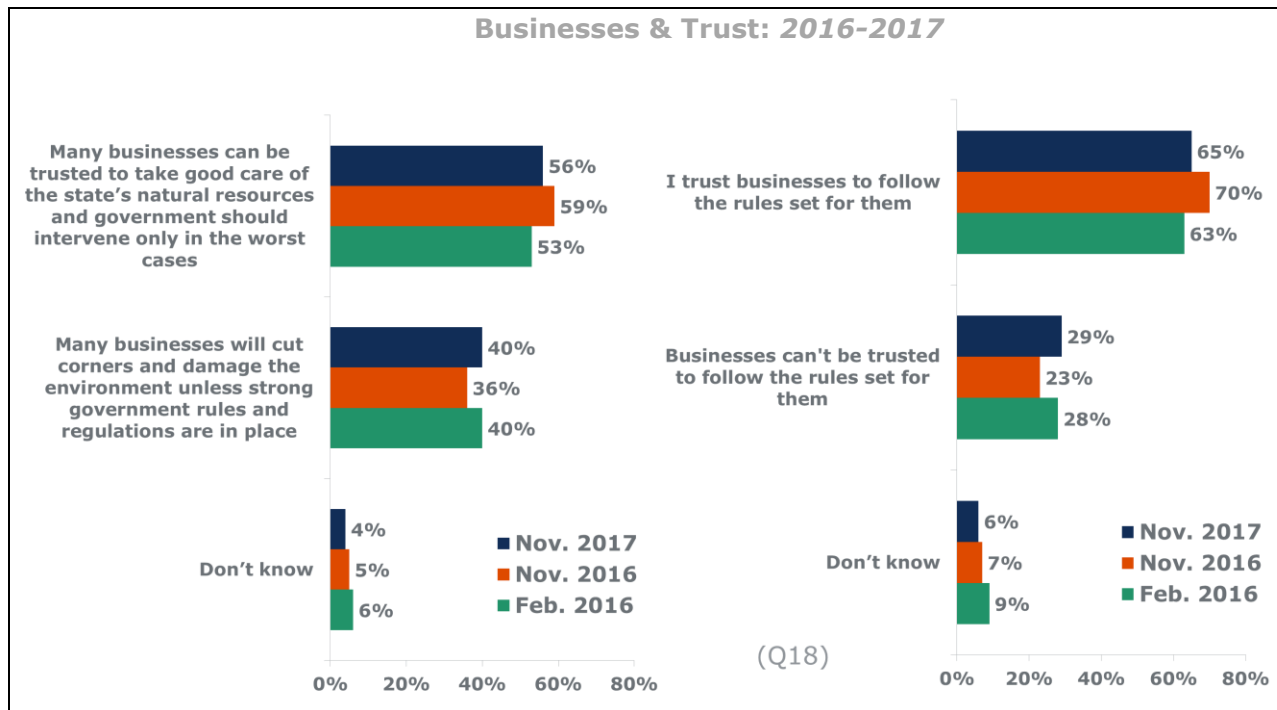


We also explored perceptions of businesses by asking which viewpoint voters agreed with most regarding businesses and government. Nearly three-in-five (56%) believe “businesses can be trusted to take good care of the state’s natural resources, and the government should intervene only in the worst cases,” while 40% say “many businesses will cut corners and damage the environment unless strong government rules and regulations are in place.” This represents a slightly less positive view than we saw in November 2016, when 59% said business can be trusted and 36% said businesses will cut corners.

By party, Republicans widely agree businesses can be trusted to take good care of state’s natural resources, as do the majority of Independents, but Democrats widely disagree.

By a better than 2:1 margin, Montanans “trust businesses to follow the rules set for them.” Indeed, 65% have trust in businesses, while only 29% say businesses can’t be trusted to follow rules and 6% have no opinion. The pro-business margin on this measurement has declined slightly since November 2016 (70% trust).

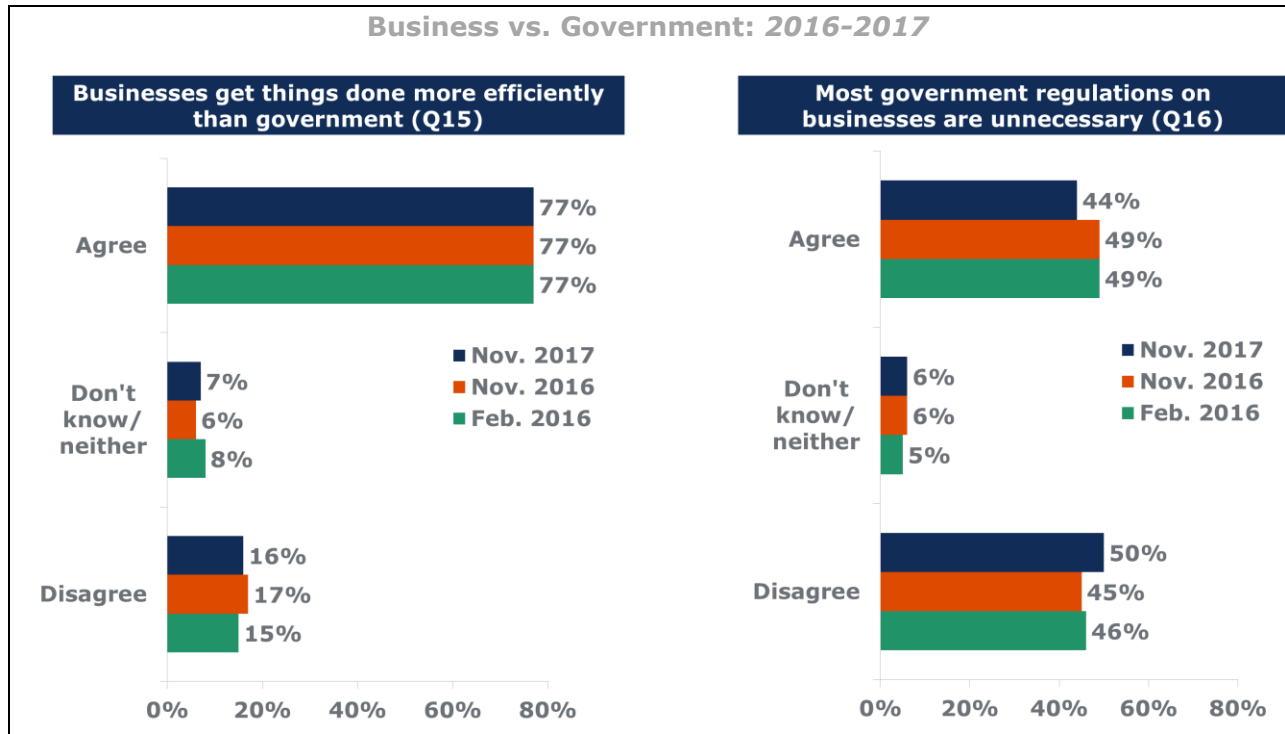
By subgroup, the majority among Republicans and Independents are trusting, while a majority of Democrats are not.



In another pair of statements, more than three-quarters (77%) of voters agree “businesses get things done more efficiently than government,” compared to just 16% who disagree. There is consensus agreement among majorities in all subgroups. These results are similar to 2016.

At the same time, there is less clarity concerning government regulations; 44% agree “most government regulations on businesses are unnecessary,” but another 50% disagree. The biggest differences on this issue are by partisanship, with majorities of Republicans agreeing most regulations are unnecessary, and majorities of Democrats and Independents disagreeing. The overall results on this question show a decline in agreement since 2016 (49% agreed in both the November and February 2016 surveys).

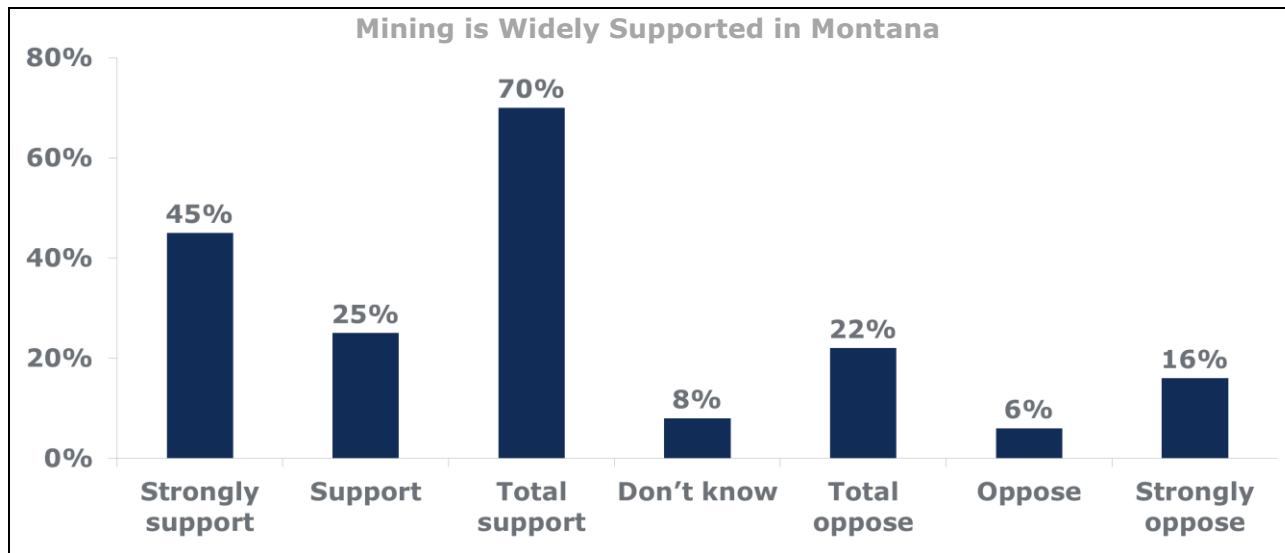
**Business vs. Government: 2016-2017**



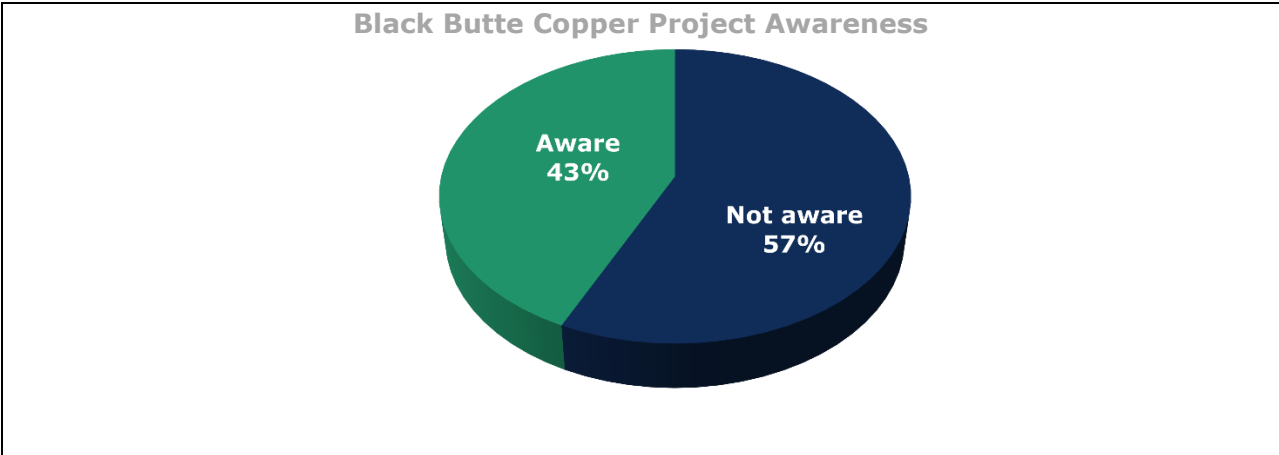
**Sponsorship Questions**

*Mining*

Seven-in-ten voters support mining in Montana (70% support, 22% oppose, 8% don't know). Mining finds support throughout the state, among both men and women and voters of all ages. When it comes to partisanship, majorities of Republicans and Independents are supportive, but just a narrow plurality (48%) of Democrats are supportive.



Today, 43% are aware of the Black Butte Copper Project. Awareness is higher in the Butte/Helene TV market and lower in the Missoula TV market, while Republicans are slightly less likely to be aware than either Democrats or Independents.

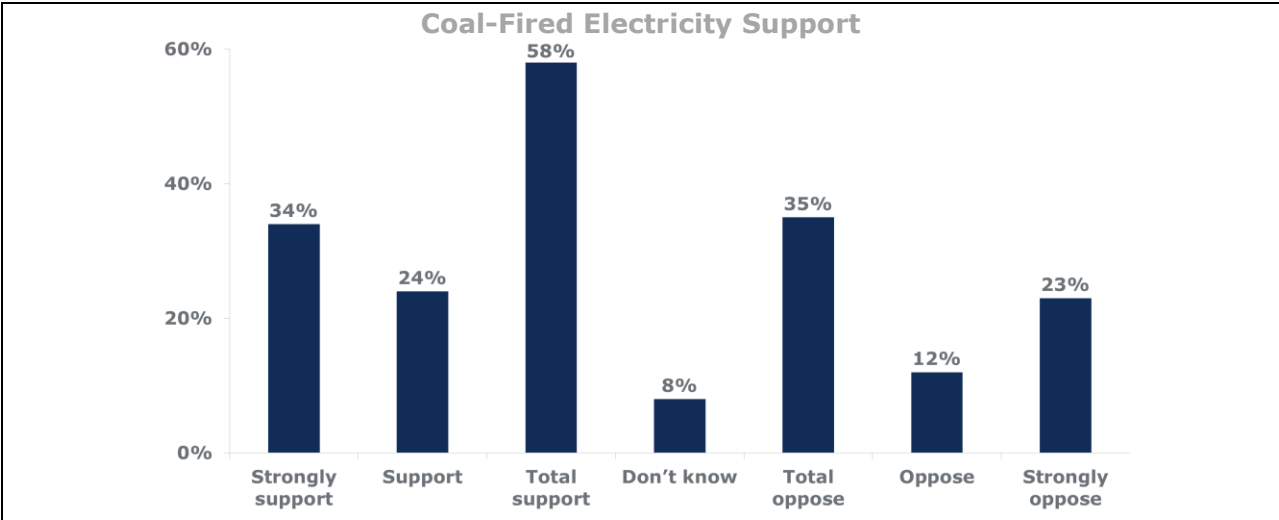


Among those who are aware of the project, 53% support and 33% oppose the project, with the remaining 14% undecided. Support among those aware is higher among men (64% support) than women, who are divided. By partisanship, Republicans and Independents are supportive, but Democrats are opposed.

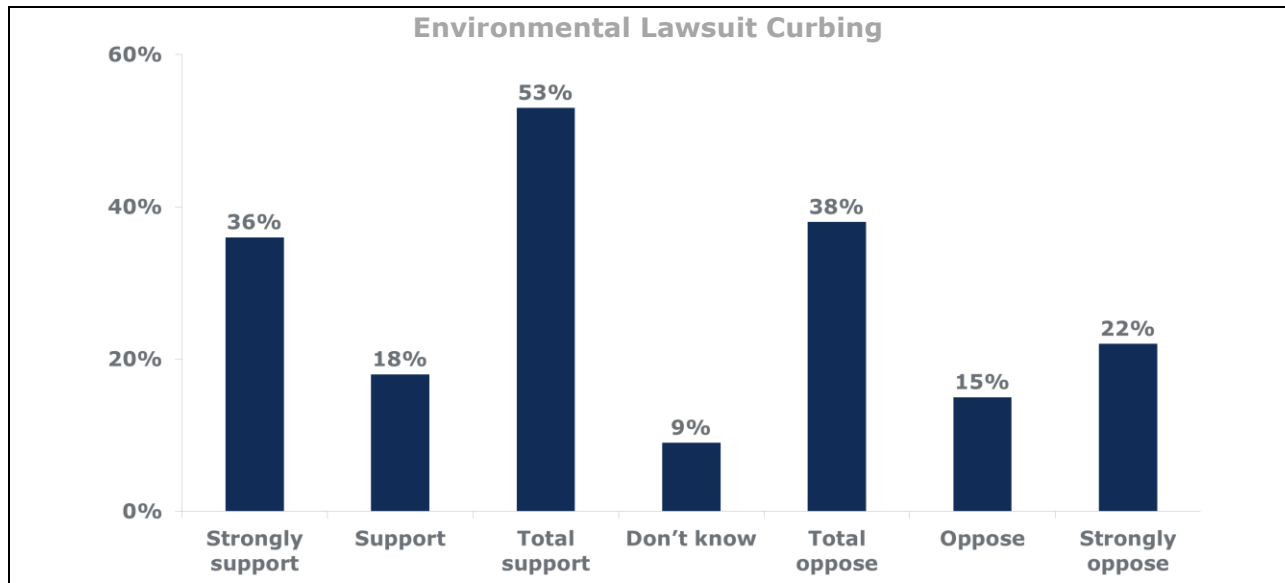
Among those previously unaware or aware but opposed to the project, after being asked if they would support the project if it met all water degradation standards for quality and quantity in reclamation to protect the environment, support reaches 61%, with 29% opposed and 10% undecided. There is majority support among both Republicans and Independents, but Democrats are divided.

*Coal-Fired Electricity Issues/Colstrip*

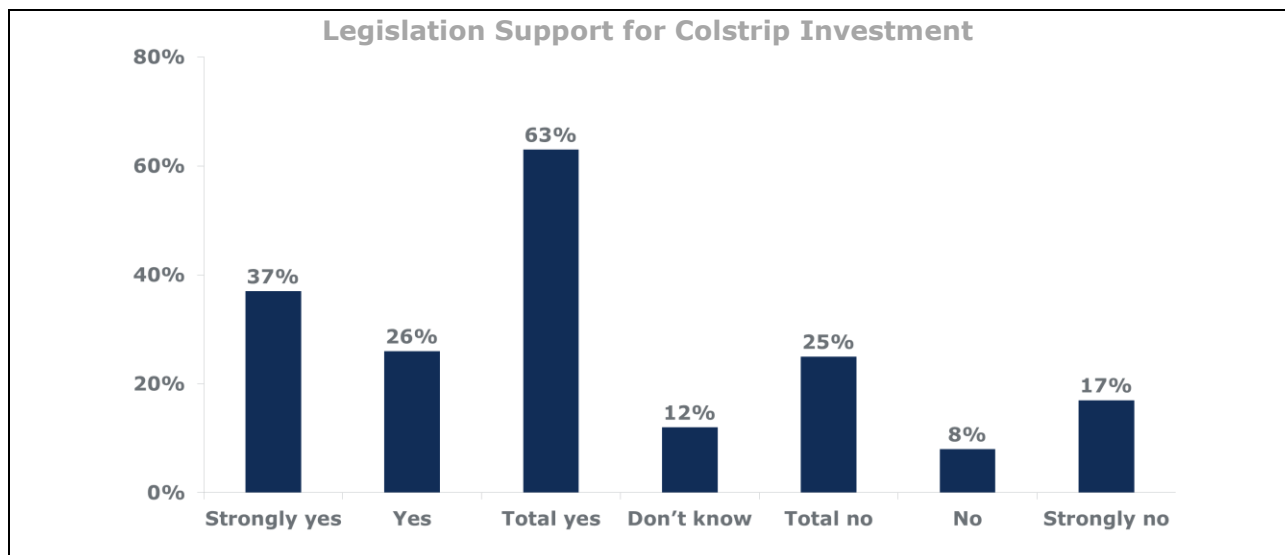
Nearly three-in-five (58%) support the use of coal-fired electricity generation in Montana, while 35% oppose and 8% have no opinion. Support is highest outside the Missoula and Butte/Helena TV markets, and men are more likely to support than women. By age, support is higher among those age 35+ than the 18-34 set. Further, majorities of Republicans and Independents are supportive, while the majority of Democrats are opposed.



After hearing, "Colstrip is Montana's largest coal-fired power plant, and closing Colstrip would result in significant job losses and damage to Montana's economy," 53% support state action to curb environmental lawsuits and out-of-state legislation that threaten Colstrip's operations, while 38% are opposed and the remaining 9% are undecided. As with support for coal-fired electricity overall, support is highest outside the Missoula and Butte/Helena TV markets. Support is also higher among men than women and higher among those age 35-64 than older and younger voters. By party, majorities of Republicans and Independents are supportive, but a majority of Democrats are opposed.

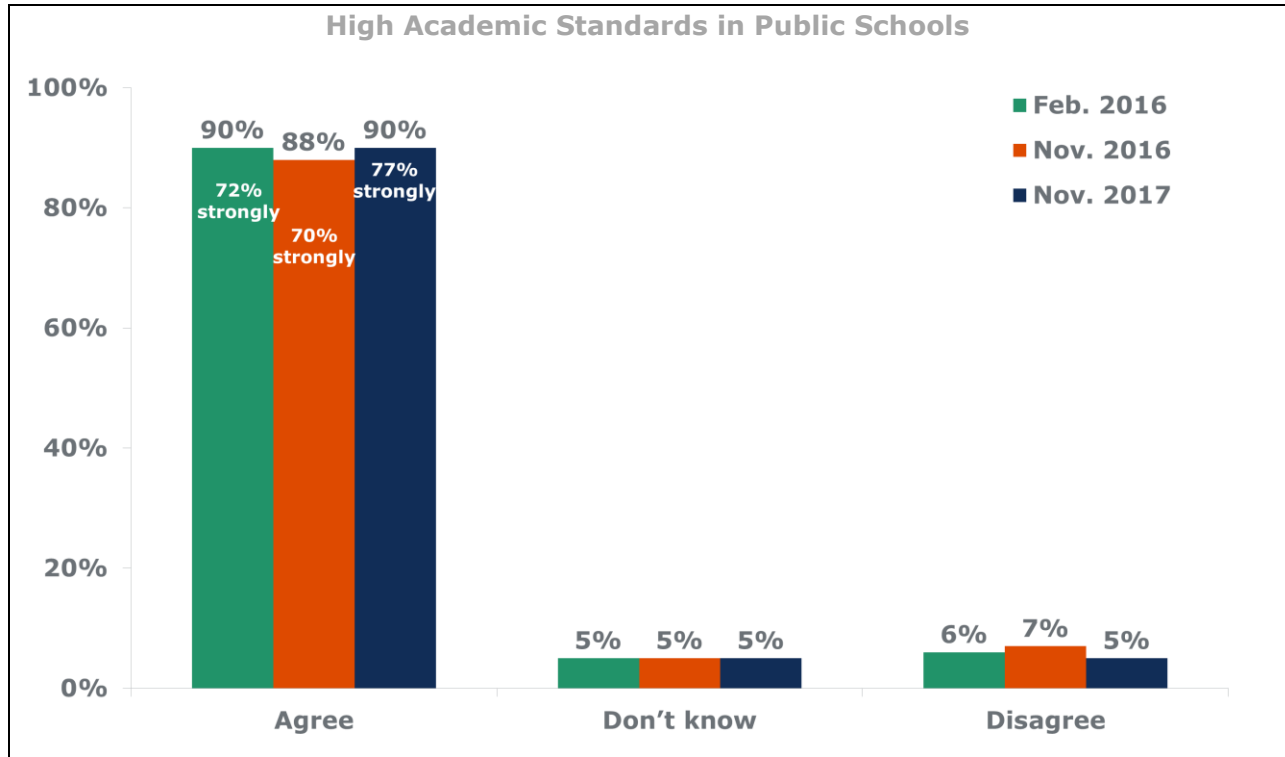


When it comes to support for "legislation currently pending in Congress that would promote investment in Colstrip and keep it operational by providing tax credits for retro-fitting the power plant with Carbon Capture and Storage, a technology that would capture and store underground, most carbon emissions from the production of energy from fossil fuels," 63% of Montana voters want their Senators and Congressman to support that legislation. Just 25% disagree and 12% have no opinion. Majorities among Republicans and Independents want officials to support the legislation, but Democrats are divided on this issue.



### High Academic Standards in Montana's Public High Schools

There continues to be nearly universal agreement (among 90% of voters) that, "holding Montana's public schools to high academic standards is an essential component of ensuring that Montana children remain competitive in a global economy." Just 5% disagree. There is consensus agreement on this issue among all subgroups throughout the state. Sentiment was similar in 2016.



### CONCLUSION

Our survey of 800 voters statewide in Montana in November 2017 reveals Montana's businesses and Chamber of Commerce continue to be well-regarded; voters are positive about business organizations like the Chamber and continue to be more likely to vote for candidates endorsed by the Chamber than they are to vote for candidates endorsed by labor unions or environmental groups. Additionally, voters also trust Montana businesses to do the right thing in terms of protecting workers and the environment, and are more likely to credit business over public officials for economic growth in the state.