



January 13, 2022

TO: Bridger Mahlum
FROM: Erik Iverson, Moore Information Group
RE: Montana Voter Survey Results: December 2021 Survey

Confidentiality Statement

The Montana voter survey results reported here are confidential. Upon knowledge and receipt of the findings you agree to not disclose the information to any third party. This includes, but is not limited to, verbal conversations, written documentation, social networks, web postings or Internet comments.

The Montana Chamber of Commerce will make all decisions regarding the public release of this information, and in some cases, might choose to refrain from publicly releasing certain results.

Methodology

A total of 600 telephone interviews were conducted December 16-20, 2021, among a representative sample of registered voters in Montana. Interviews were conducted using live interviewers and included both landline and cell phones. The sampling error is plus or minus 3% at the 95% confidence level.

Pocketbook Issues and Legislative Priorities

Today there is no consensus among voters' personal financial concern – the leading responses include health care costs (18%), taxes (17%) and ensuring a secure retirement (15%). These results reflect a shift from previous years when health care costs were by far the leading concern.

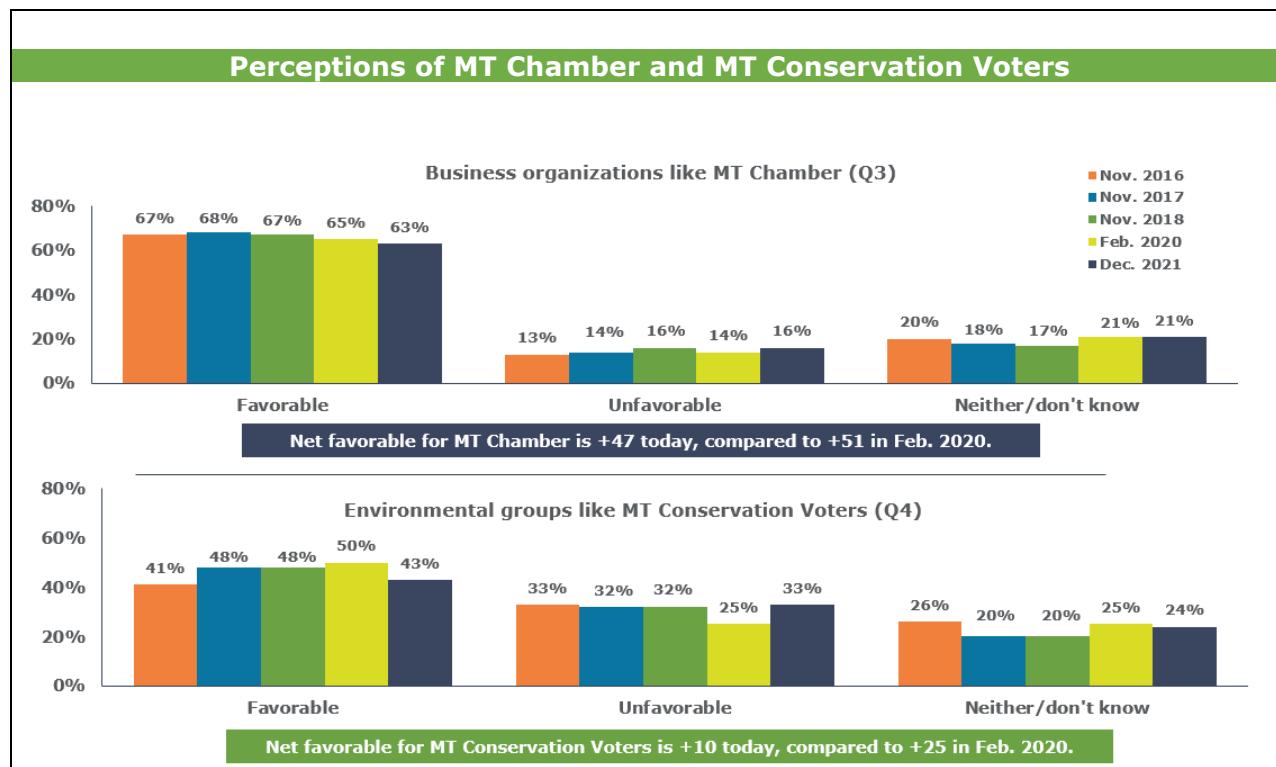
Personal Financial Concern	2009	2010	2011	2012	2013	2014	2016	2017	2018	2021
Health care costs	24%	30%	26%	25%	28%	25%	29%	33%	30%	18%
Taxes	18%	18%	13%	17%	12%	13%	10%	13%	13%	17%
A secure retirement	14%	12%	15%	14%	17%	13%	14%	13%	14%	15%
Housing costs	4%	4%	3%	3%	4%	4%	4%	6%	7%	10%
Energy costs	5%	8%	7%	5%	5%	5%	3%	1%	1%	10%
Paying off debt	12%	12%	10%	7%	12%	14%	14%	10%	12%	8%
Children's education	9%	11%	11%	9%	11%	8%	8%	7%	6%	5%
Job security	11%	--	9%	10%	8%	6%	7%	5%	5%	3%

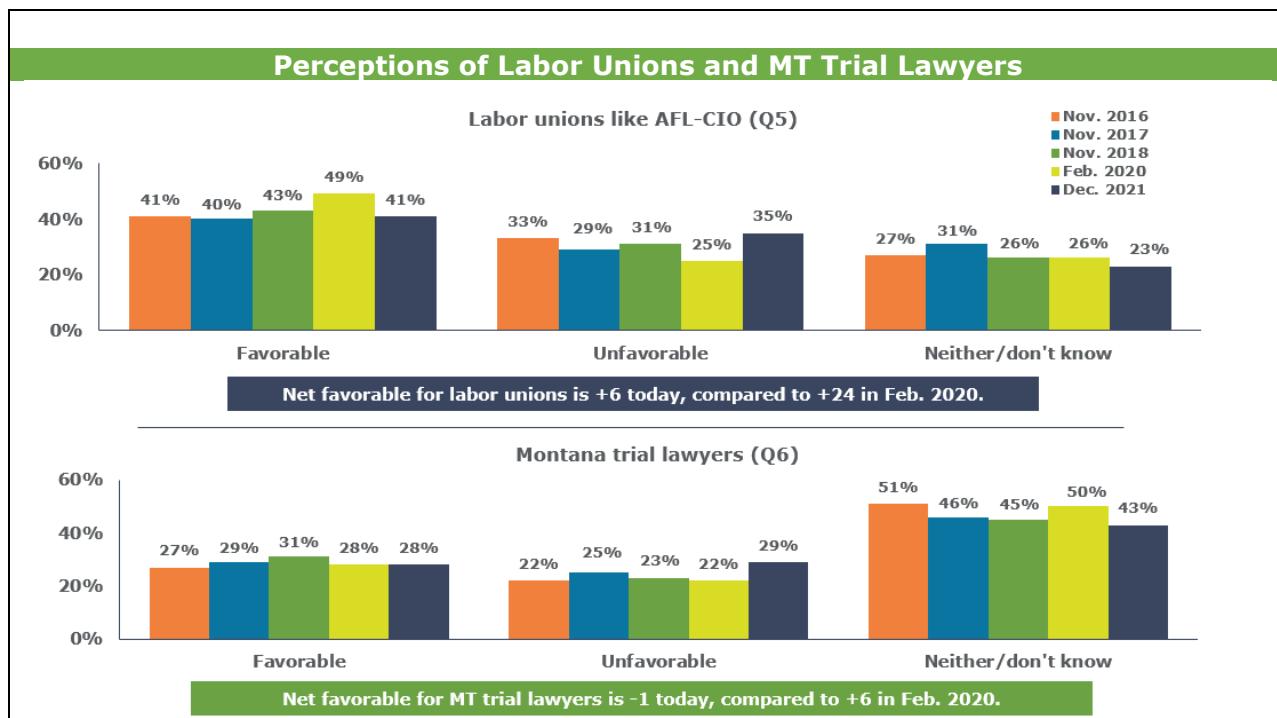
Looking at voters' priorities for the next legislative session, controlling government spending tops the list (24%), followed by providing property tax relief (14%) and improving access to health care (14%). Previously, both controlling government spending and improving access to health care were top concerns. Health care is top priority among Democrats; government spending is top for Republicans and Independent/other voters.

Legislative Priorities	Nov. 2016	Nov. 2017	Nov. 2018	Dec. 2021
Controlling government spending	19%	22%	19%	24%
Providing property tax relief	9%	11%	10%	14%
Improving access to health care	17%	20%	23%	13%
Improving local infrastructure	14%	9%	9%	11%
Increasing funding for education	17%	16%	14%	11%
Enacting stricter environmental laws	7%	7%	8%	9%
Providing incentives for more natural resource production	8%	5%	5%	8%
Providing business tax relief	5%	5%	4%	3%
Don't know	6%	6%	7%	7%

Perceptions of Organizations

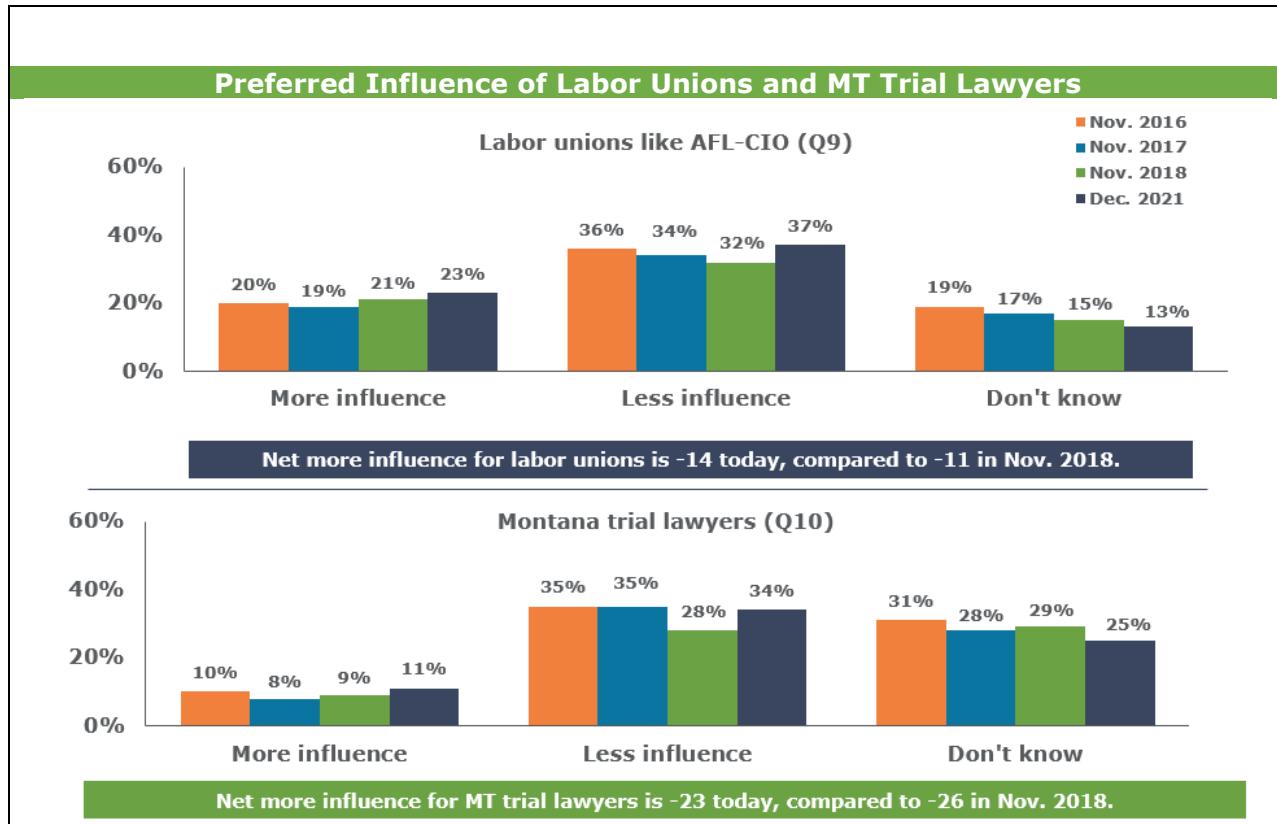
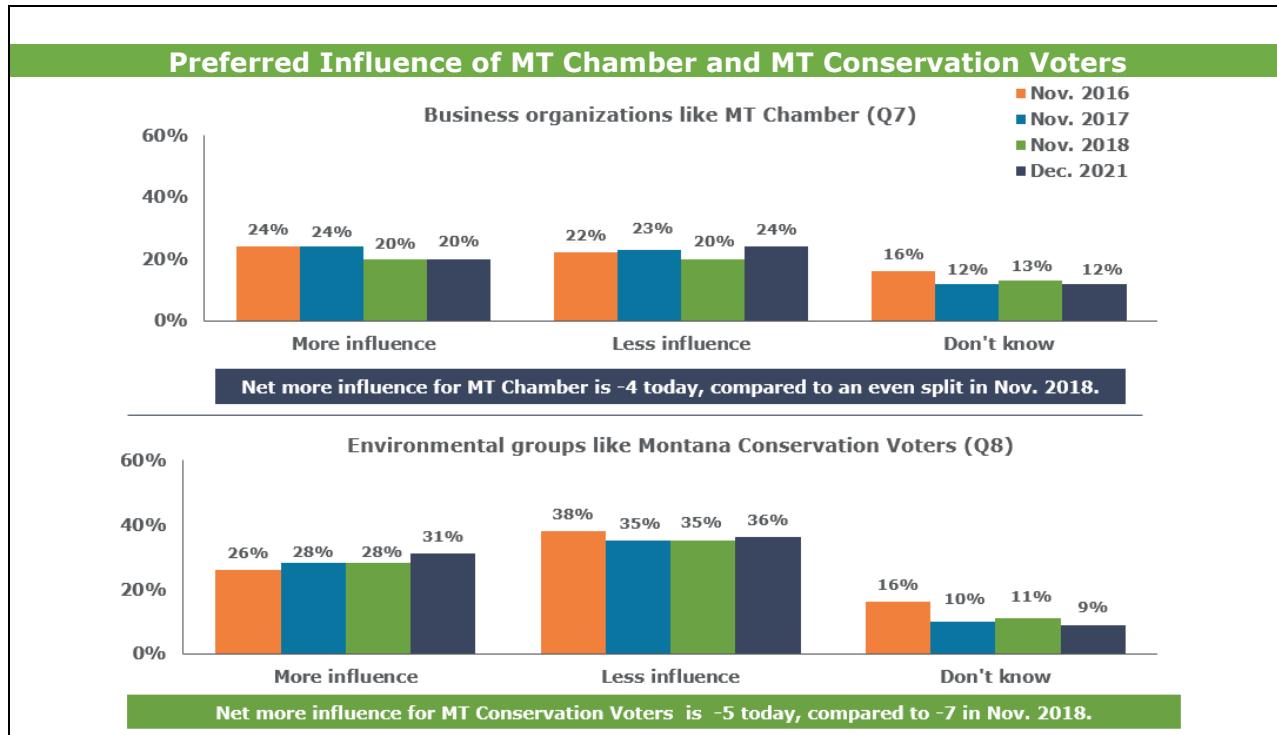
Voters continue to hold "business organizations like the Montana Chamber of Commerce" in high regard (63% favorable/16% unfavorable today; 65/14% in February 2020). Voters also remain positive about "environmental groups like Montana Conservation Voters" (43/33%) and the Montana AFL-CIO (41/35%), but both of these organizations have seen a drop in positives and an increase in negatives since February 2020. Fewer voters have an opinion about "Montana trial lawyers" today and those with an opinion are divided (28% favorable/29% unfavorable). Sentiment about trial lawyers was narrowly positive in the Feb. 2020 survey.





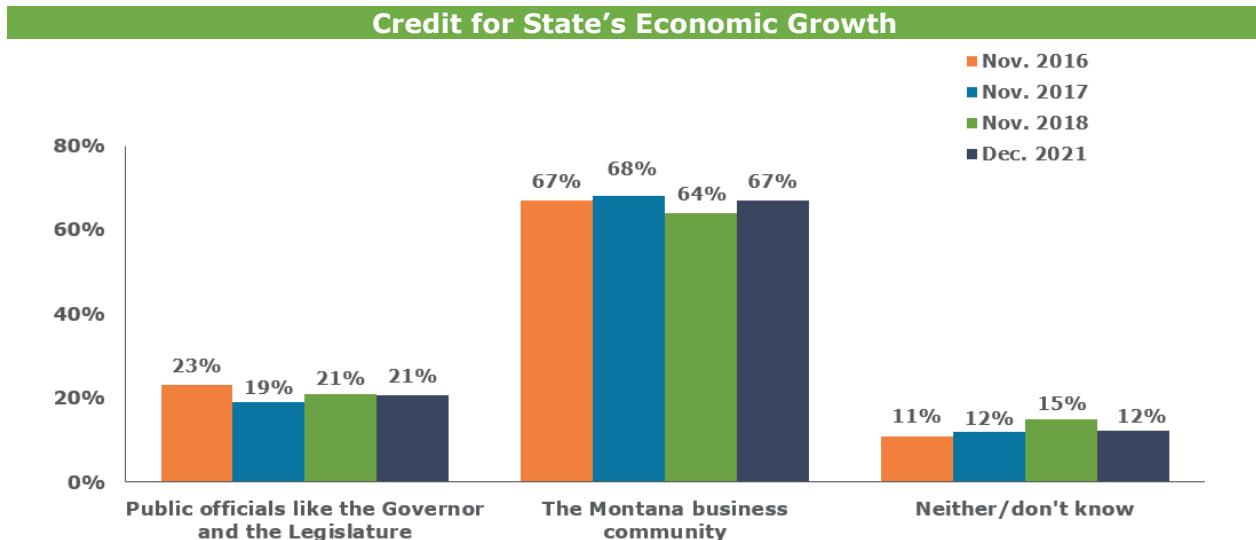
Influence of Organizations on Public Policy

A plurality of voters remains satisfied with the level of influence business organizations like the Montana Chamber of Commerce have when it comes to public policy decisions. Today, 41% say business groups like the Chamber have the “right amount” of influence, while 20% would like to see business groups have more influence and 24% would prefer less. The percentage of voters saying the Chamber has the “right amount” of influence is down compared to 2018 (47% right amount/20% more/20% less). And, as we found in 2018, pluralities of Montana voters would like to see less influence from labor unions, environmental groups and trial lawyers.



Economic Growth

Montanans continue to give widespread credit to the business community for the state's economic growth. Today, 67% say the state's business community deserves the most credit for economic growth, while just 21% would attribute economic growth to public officials, like the Governor and State Legislature. Another 6% say neither should get the credit and 6% have no opinion. These results are similar to November 2018. There is consensus agreement among Republicans, Democrats and Independents, alike that the business community deserves the most credit.

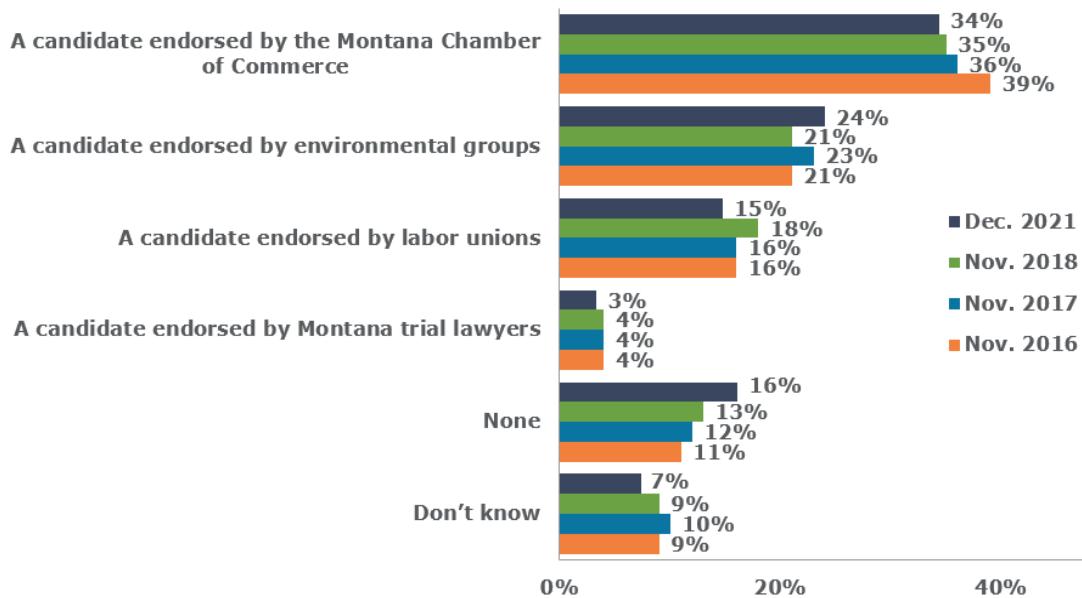


Candidate Preference

When asked which of four candidates voters are more likely to support, a candidate endorsed by the Montana Chamber of Commerce is most popular (for 34% of voters), followed by a candidate endorsed by environmental groups (24%), a candidate endorsed by labor unions (15%) and a candidate endorsed by the Montana Trial Lawyers (3%). Another 16% say none and 7% have no opinion. Results today are statistically unchanged from November 2018.

The Chamber's endorsement is most influential among Republicans. Independents are also more likely to be influenced by the Chamber than any of the others tested. For Democrats, environmental groups are most impactful.

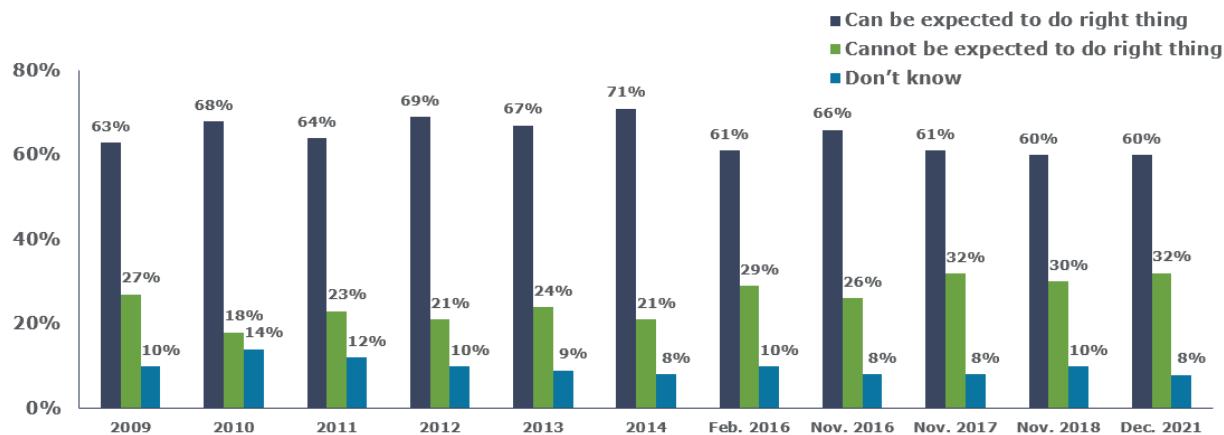
Preferred Candidate Endorsement



Perceptions of Montana Businesses

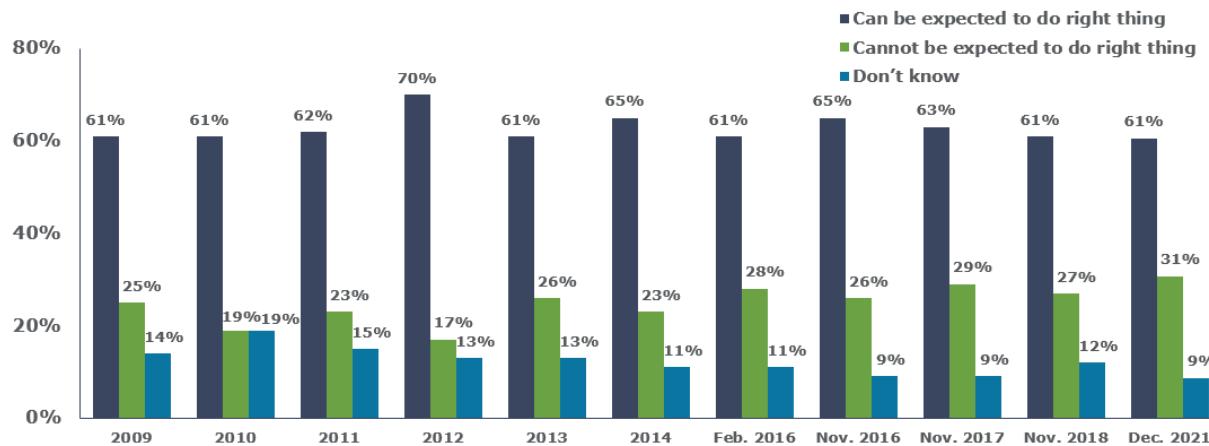
Today, 60% believe business and industry in Montana can be expected to do the right thing when it comes to “protecting the environment,” while 32% disagree. Sentiment today is similar to that of previous years.

Expected to Do the Right Thing? Protecting the Environment



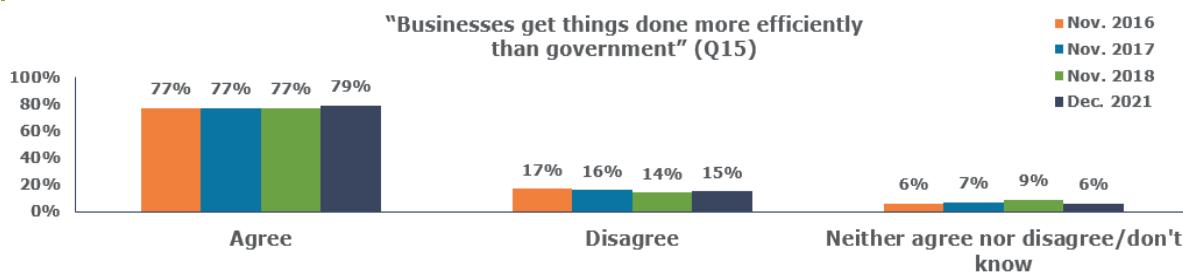
In addition, by a 61-31% margin, voters believe Montana businesses can be expected to do the right thing when it comes to “treating workers fairly when deciding on health care coverage, retirement and other workplace benefits.” These results are unchanged since 2018.

Expected to Do the Right Thing? Treating Workers Fairly

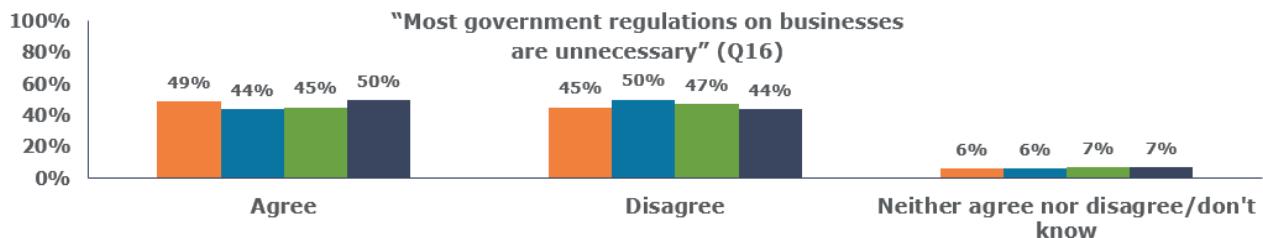


Montanans continue to give business the advantage over government when it comes to getting things done efficiently. Fully 79% agree “businesses get things done more efficiently than government.” Just 15% disagree. These results are statistically unchanged from 2018. At the same time, however, voters are less likely today to agree that “most government regulations on businesses are unnecessary.” Today, 50% agree and 55% disagree. By comparison, sentiment in 2018 was divided (45% agree/47% disagree).

Businesses v. Government

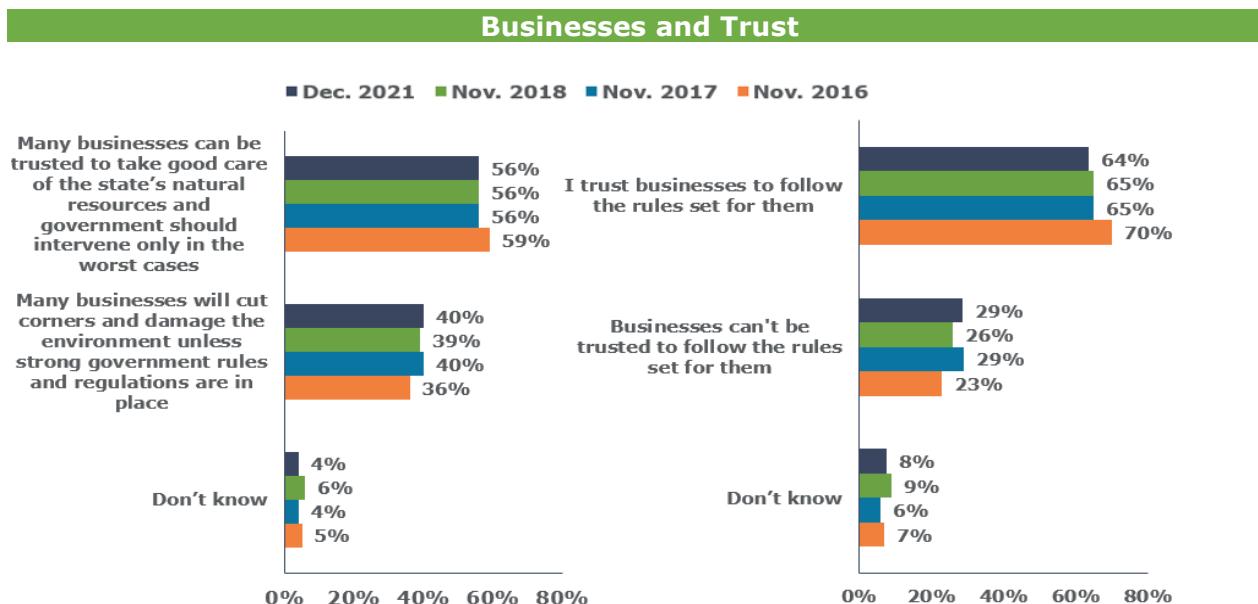


Business Regulations



Additionally, there has been no change in voters' belief that "businesses can be trusted to take good care of the state's natural resources, and the government should intervene only in the worst cases." Today, 56% say many businesses can be trusted on these issues, but still 40% say "many businesses will cut corners and damage the environment unless strong government rules and regulations are in place." In November 2018, 56% said business can be trusted and 39% said businesses will cut corners.

Finally, by a better than 2:1 margin, Montanans continue to "trust businesses to follow the rules set for them." Indeed, 64% have trust in businesses while only 29% say businesses can't be trusted to follow rules and 8% have no opinion. The pro-business margin on this measurement today is +35; similar, but numerically lower than 2018 (+39 pro-business).



Reliable Energy Source

There is wide agreement that "As Montana transitions to an even cleaner energy future, 24/7 energy sources that are consistent, such as natural gas, are critical for reliable energy service." Fully 80% agree while just 14% disagree. Agreement is widespread among all key voter subgroups, including Republicans, Democrats and Independents, alike.

