

2006 Multi-State TABOR Survey - Montana -

**TOPLINE REPORT
PRESENTED TO:**



June 2006



Alan Newman Research
MARKET RESEARCH CONSULTANTS

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Introduction / Methodology

In May 2006, AARP engaged Alan Newman Research to conduct a series of surveys in eight states regarding AARP members' awareness, knowledge, and opinions of proposed TABOR measures in their state. This report offers data and analysis for Montana.

- **Data Collection Mode:** Phone Survey
- **Field Period:** May 17 – May 23, 2006
- **Sample Size:** 600 Completed Interviews
- **Screening Criteria:** AARP Membership
- **Calling Procedures:** Unless otherwise requested by the respondent, calling was done between 5:00pm and 9:00pm Monday through Friday. Up to 10 call attempts were made per number at varying times of day as well as days of the week. Respondents who specifically request removal from our “list” are assigned a final disposition and are added to a cumulative “Do Not Call” database which automatically removes them from future research studies.
- **Margin of Error:** The maximum margin of error at the 95% confidence level for a sample of 600 respondents is $\pm 4.0\%$.
- **Response Rate (RR3):** 20%
- **Cooperation Rate (COOP3):** 44%
- **Refusal Rate (REF3):** 23%
- **Statistical Note:** Percentages may not total 100% due to rounding.

Executive Summary

- **Two out of five AARP Members believe Montana is spending too little money on state services.** However, another two out of five believe the State is spending the right amount on services such as keeping people safe, providing health and long-term care, repairing roads, etc.
- **The majority of Members feel the amount of state and local taxes they pay is about right.** More than two-fifths of AARP Members believe they are paying about the right amount of state and local taxes.
- **The majority of AARP Members say they trust state and local government to use their tax money effectively and deliver quality services.** At least one-half trust their state and local governments “a fair amount” with another one out of ten trusting them “a great deal.”
- **One-half of AARP Members suggesting that improving state services is a higher priority than limiting taxes. In addition, Members also indicate improving accountability and setting spending priorities are the most important goals for state government.** Two out of five suggest “improving accountability” is most important, while three out of ten believe the most important goal is “setting spending priorities.”
- **The majority of AARP Members have not seen or heard anything about the Montana Stop OverSpending proposal.** Only about two-fifths say they have seen or heard something about this proposal in the last year.
- **Police protection, K-12 public school education, and healthcare for people in nursing homes are the most highly valued services according to AARP Members.** Correspondingly, funding cuts to either police protection, K-12 public education, or healthcare for people in nursing homes would have an impact on how a majority of Members view the SOS Citizen Initiative-97 Proposal. At least two-thirds of Members suggest that if the SOS proposal cut these services, they would be more likely to oppose the measure.



Executive Summary (continued)

- **Overall, AARP Members appear generally unconvinced by arguments either in support of or in opposition to the SOS proposal.** Though the majority of Members say they find the various arguments “somewhat convincing” at best, arguments suggesting the refunds from the SOS proposal would be offset by out-of-pocket expenses and that Montana already has a balanced budget requirement appear to be the most convincing.
- **One-half of AARP members would be more likely to oppose the SOS Citizen Initiative-97 Proposal if they knew AARP and other senior organizations also opposed it.** Three out of ten Members say AARP’s opposition as well as that of other senior organizations would not make a difference in how they voted on the SOS initiative.
- **Initially, two out of five AARP Members claim they would vote for the SOS Citizen Initiative-97 Proposal. However, when asked at the end of the survey, only one-quarter still indicate they would vote for the measure.** More than half of AARP Members (40%) said they would probably vote in favor of the proposal after hearing a brief description of SOS. Members were then presented a short series of arguments both for and against the initiative. When asked about supporting or opposing the initiative after hearing these arguments, only three out of ten Members (30%) said they either strongly or somewhat support the proposal. Finally, at the end of the interview, Members were again asked how they would vote, and only one out of four (24%) continued to say they were at least leaning toward voting for the SOS proposal. This 16% shift between the initial measure and the final measure is statistically significant at the 95 percent level of confidence.



DETAILED FINDINGS



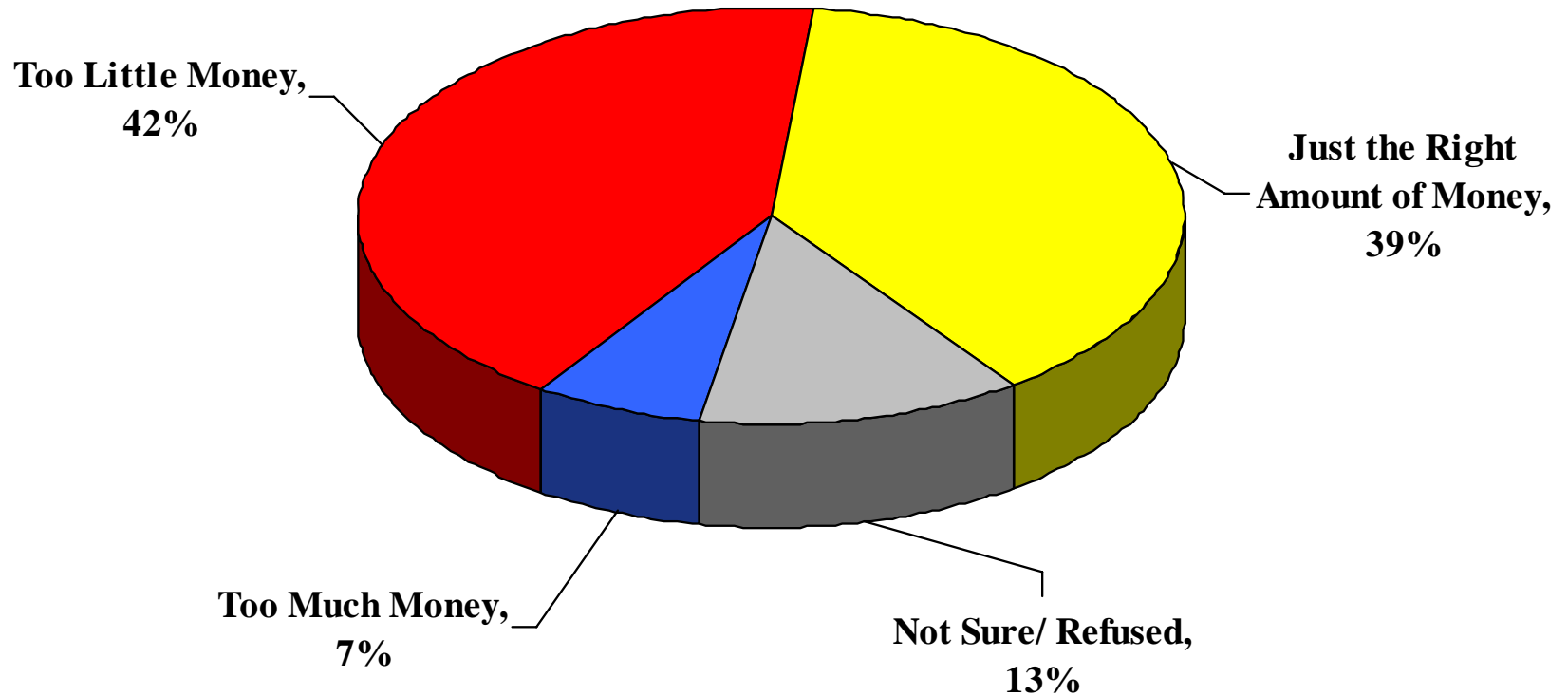
Univariate Analysis



Q1. Do you think that Montana is spending too much money, too little money, or just the right amount of money on state services such as keeping people safe, providing health and long-term care, repairing roads and highways, maintaining parks, and providing education?

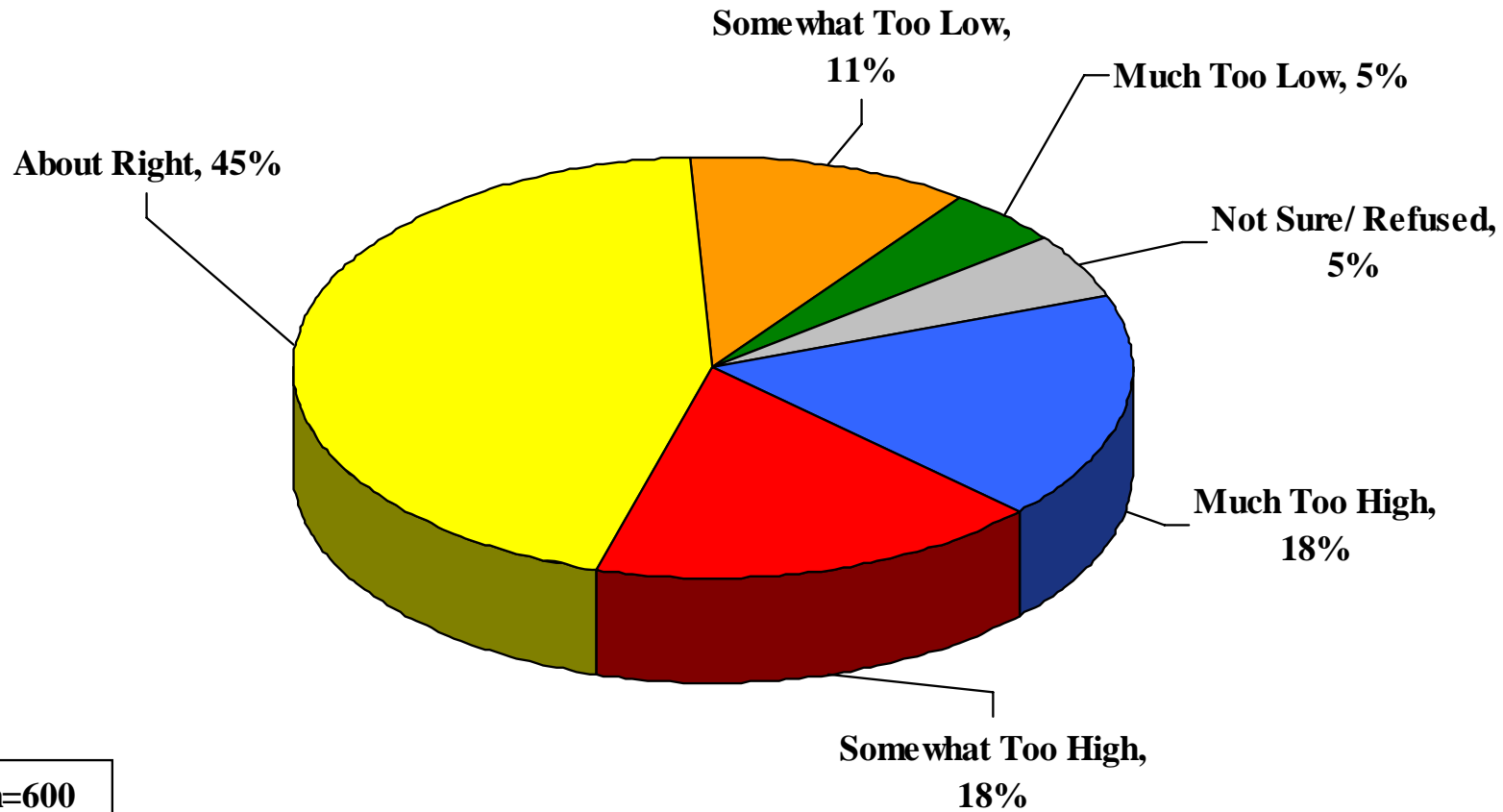
Two out of five AARP Members in Montana believe the State is spending too little money on state services. However, another two out of five believe Montana is spending the right amount of money on these services. Only seven percent of Members say they believe Montana is spending too much money on state services.

n=600



Q2. Thinking about the state and local taxes that you pay, not including federal taxes, do you think that taxes in Montana are too high, are about right, or are too low to support state services?

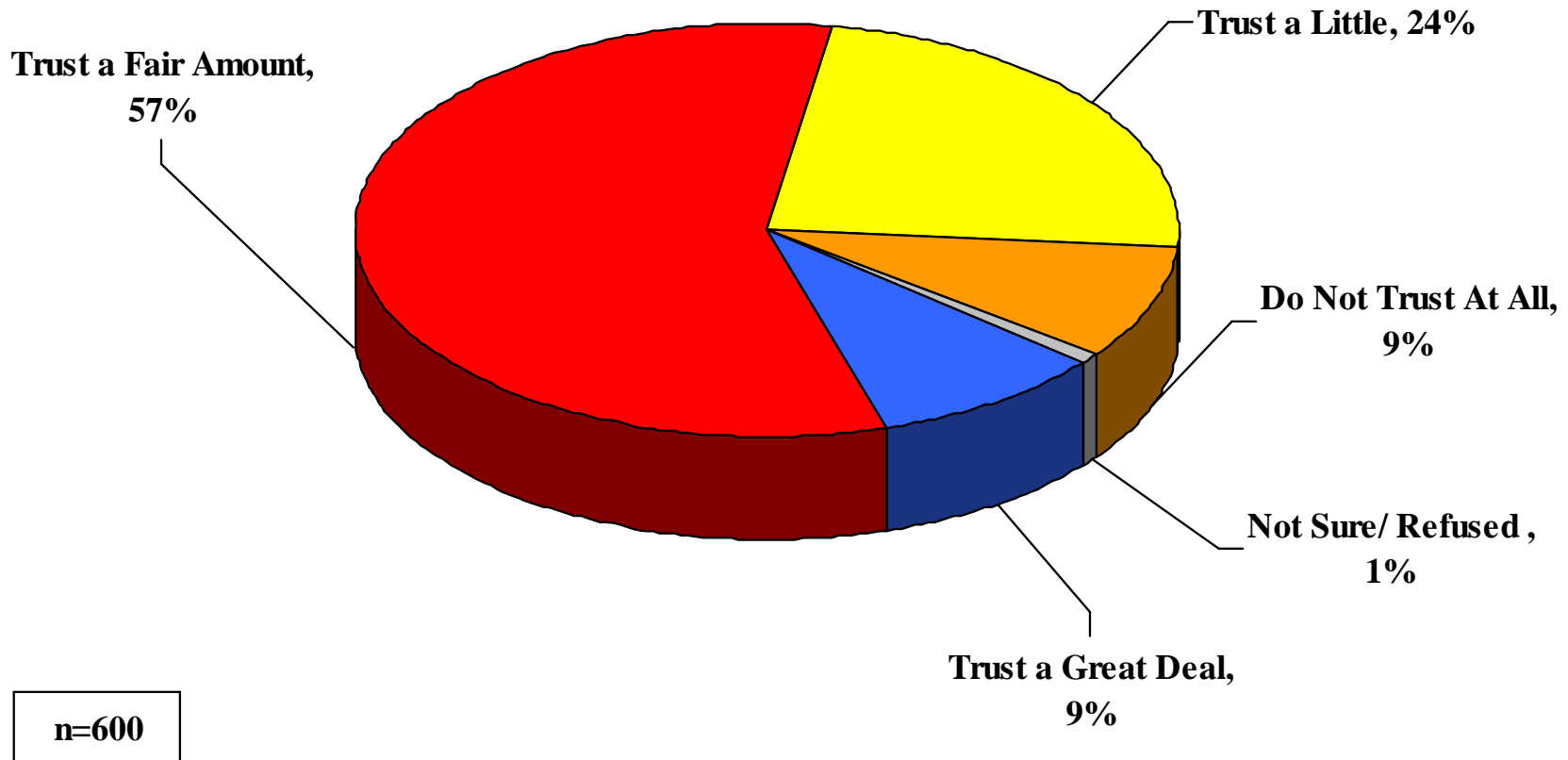
More than two-fifths of AARP Members living in Montana think the level of state and local taxes they pay is about right. One-third of Members suggest the amount they pay is too high.



n=600

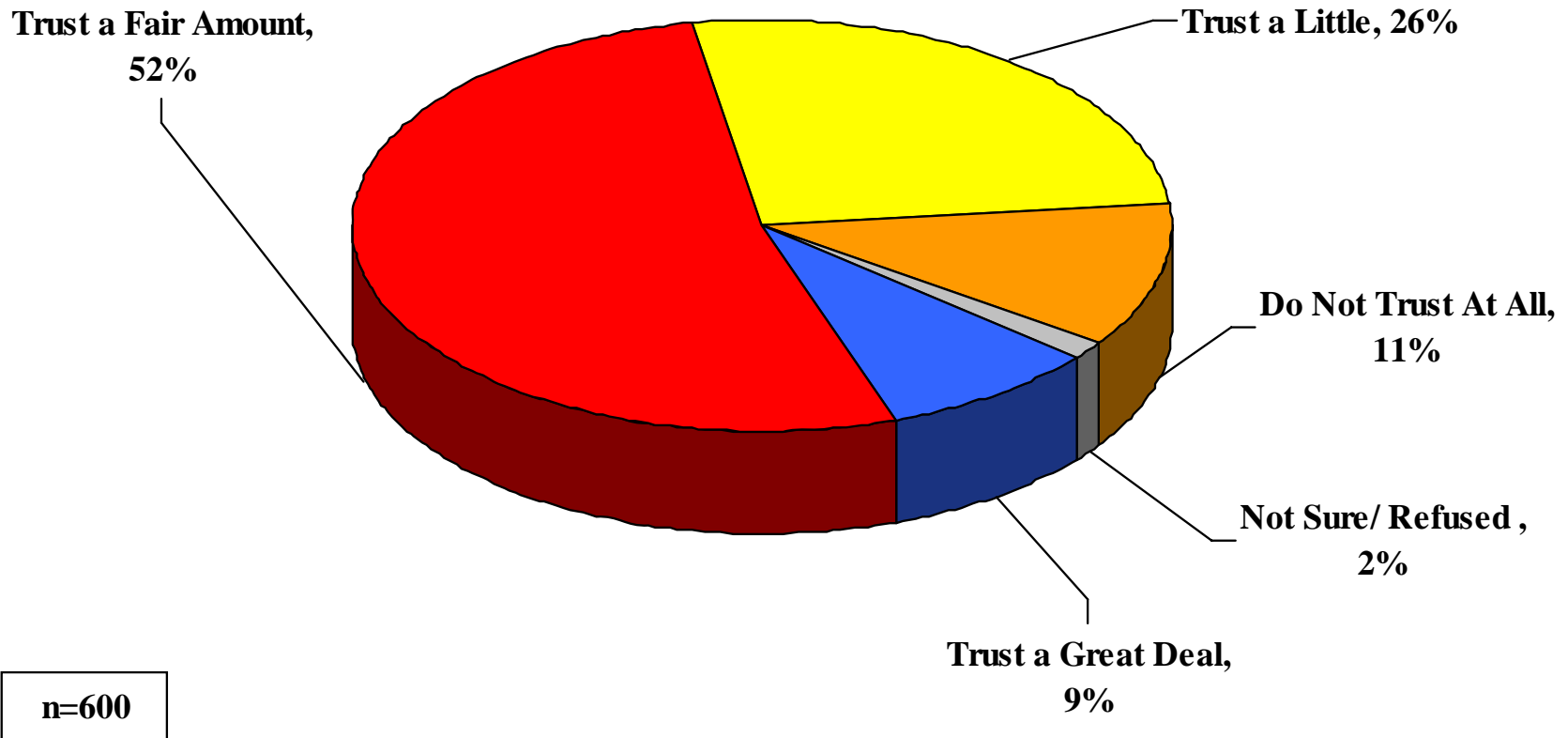
Q3a. How much do you trust your state government to use your tax money effectively and deliver quality state services?

Nearly three out of five AARP Members living in Montana trust the State government “a fair amount,” while another one out of ten say they trust the state government “a great deal.” On the other hand, one out of five say they trust the State government only “a little.” One out of ten suggest they do not trust the State government at all.



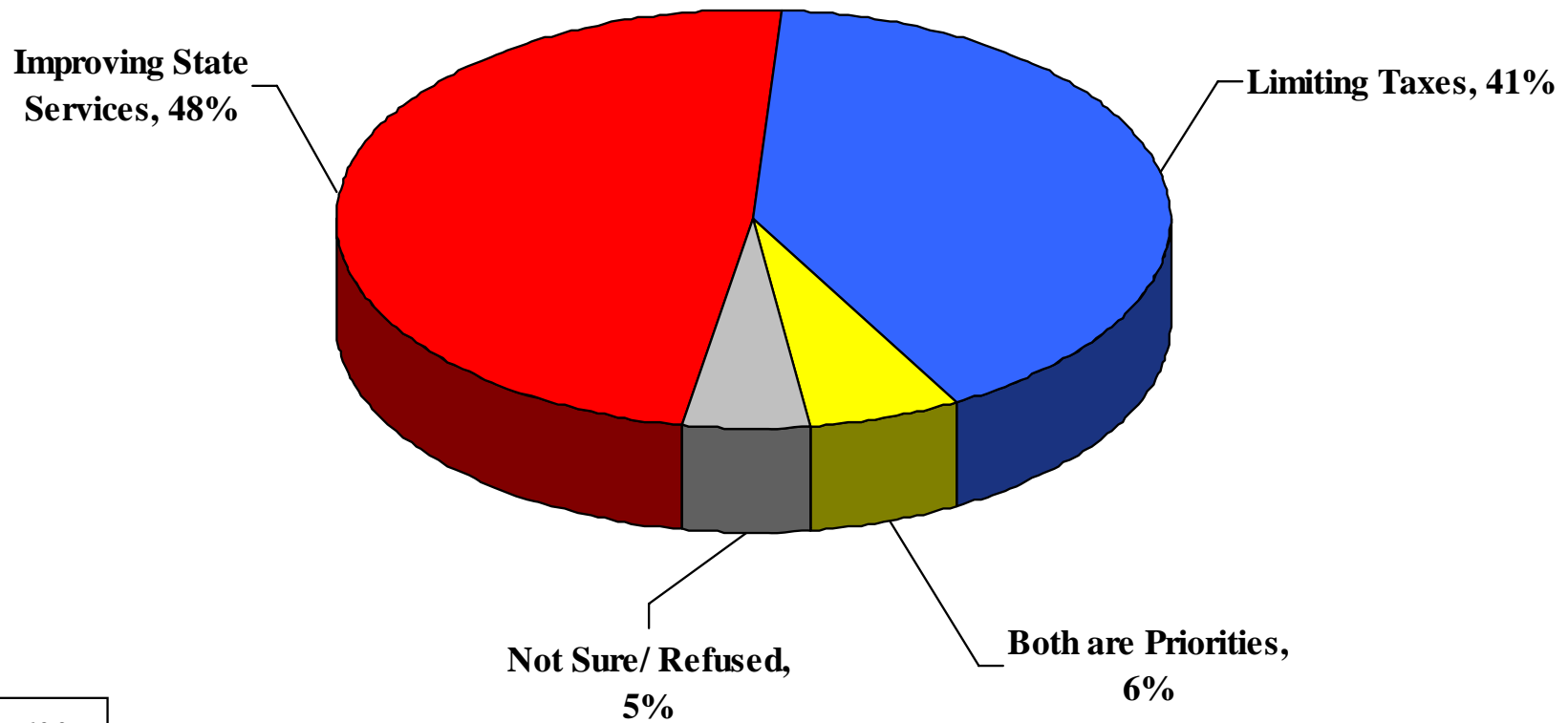
Q3a. How much do you trust your local government (includes Towns, Cities, and Counties) to use your tax money effectively and deliver quality state services?

More than half of AARP Members living in Montana trust the local government “a fair amount.” One out of ten say they trust their local government “a great deal.” Nearly one-fourth trust the local government a little.



Q4. In Montana, which is a higher priority for you...?

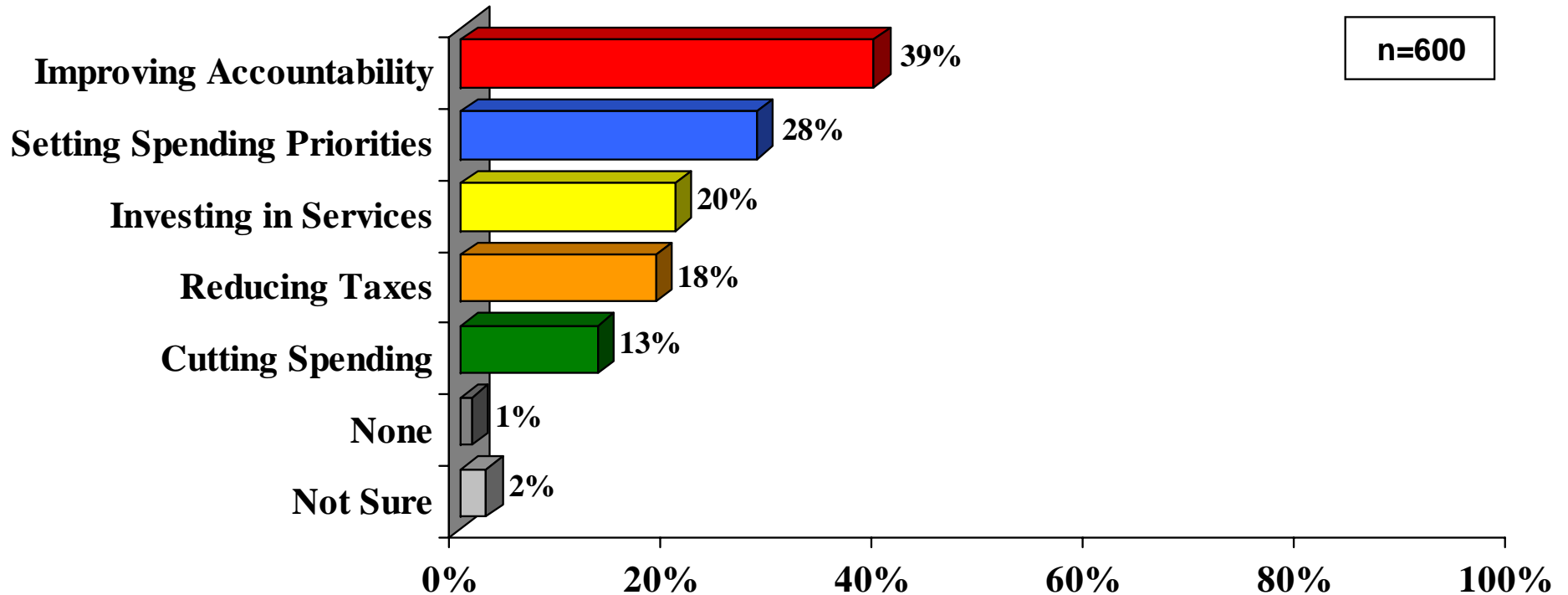
One-half of AARP Members suggest improving state services is a higher priority than limiting taxes. However, two-fifths of Montana Members assert the opposite. Only six percent indicate both of these goals are a priority.



n=600

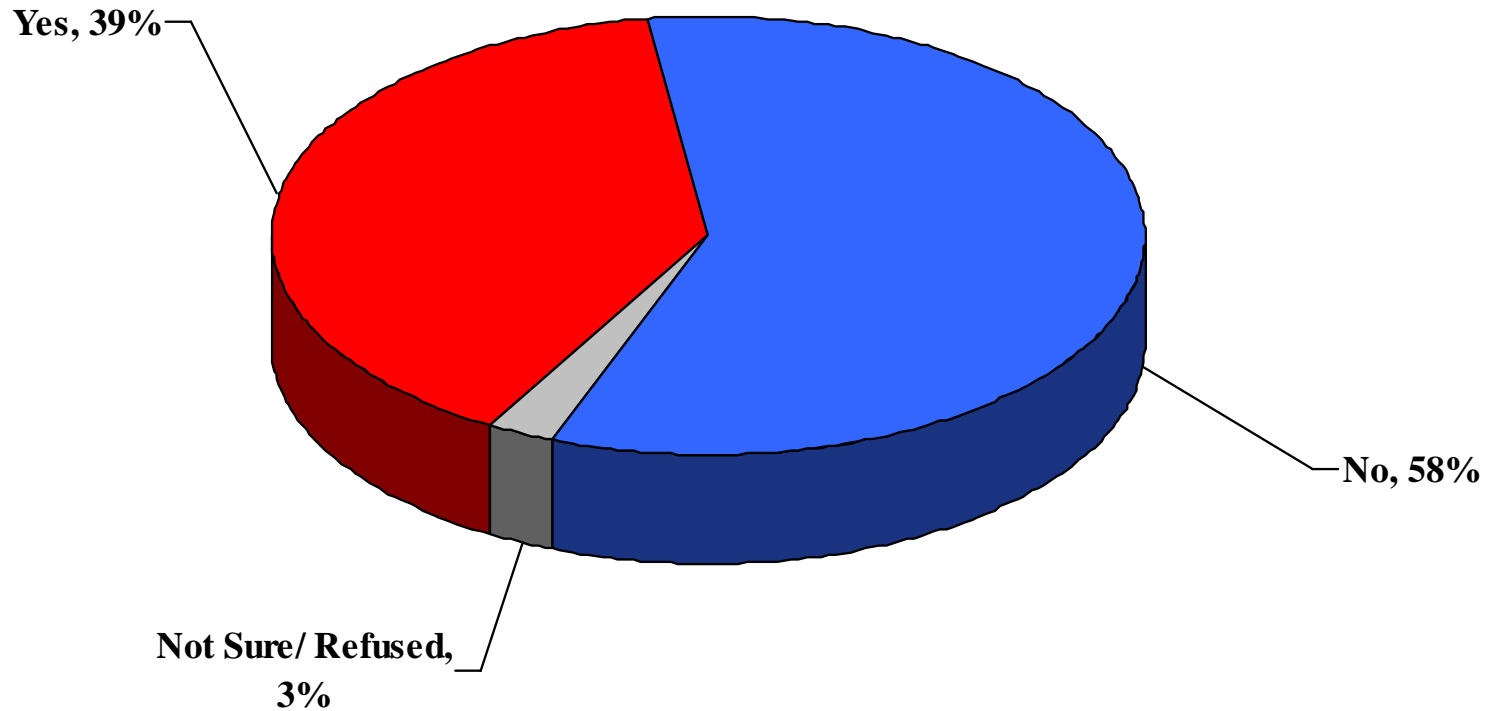
Q5. Thinking about state government today in Montana, which one or two of the following goals are most important to you?

Two out of five AARP Members living in Montana say “improving accountability” is the most important goal for state government. One out of four assert that setting spending priorities is an important goal.



Q6. Have you seen, read, or heard anything about Montana's Stop OverSpending or SOS Citizen Initiative-97 proposal, also known as the Taxpayer Bill of Rights, or TABOR proposal in the last year?

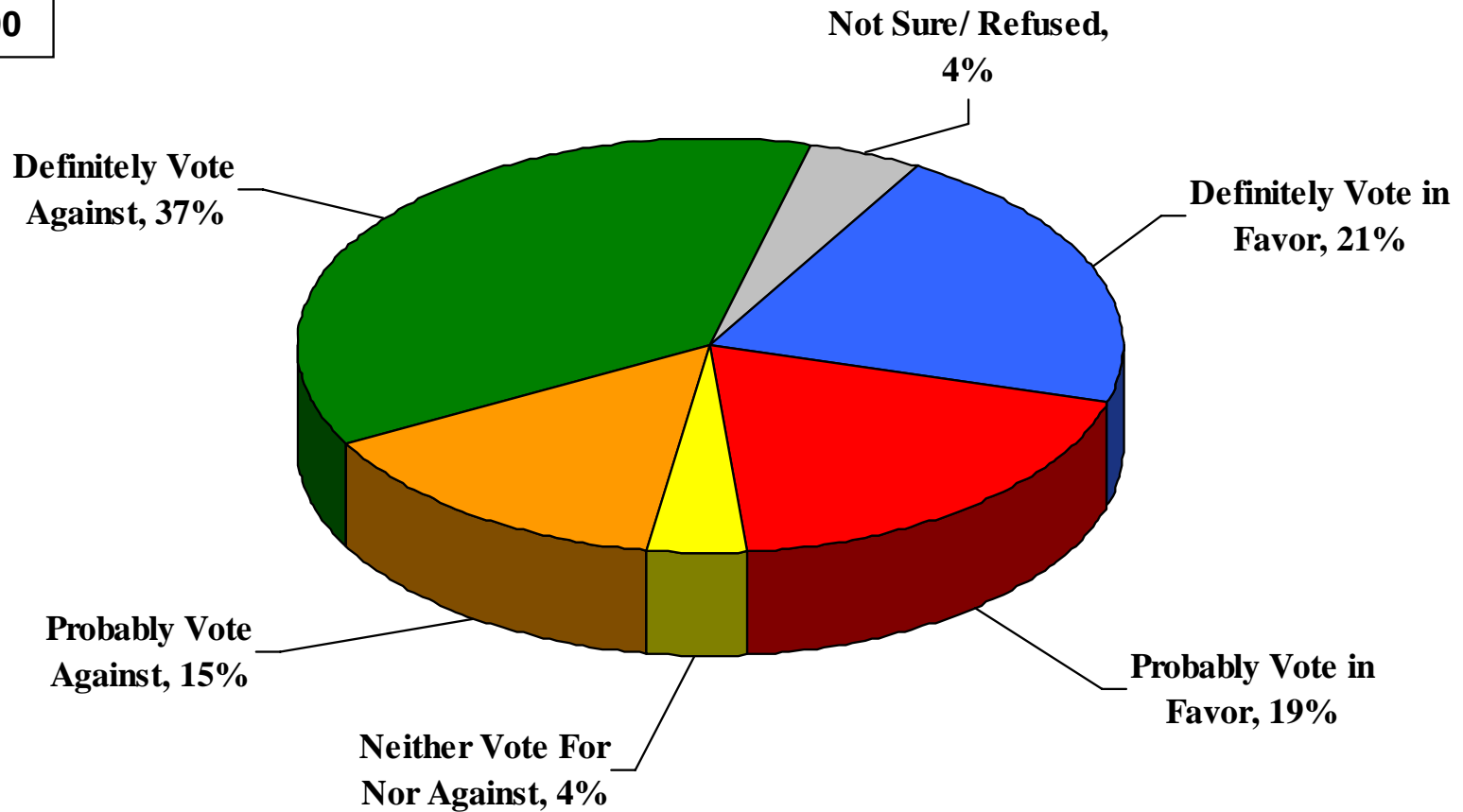
Two out of five AARP Members in Montana say they have seen or heard something about the SOS proposal in the last year.



Q7. Given what you know about the proposal, if the election were held today, would you vote for or against the “Stop OverSpending” or SOS Citizen Initiative-97 proposal?

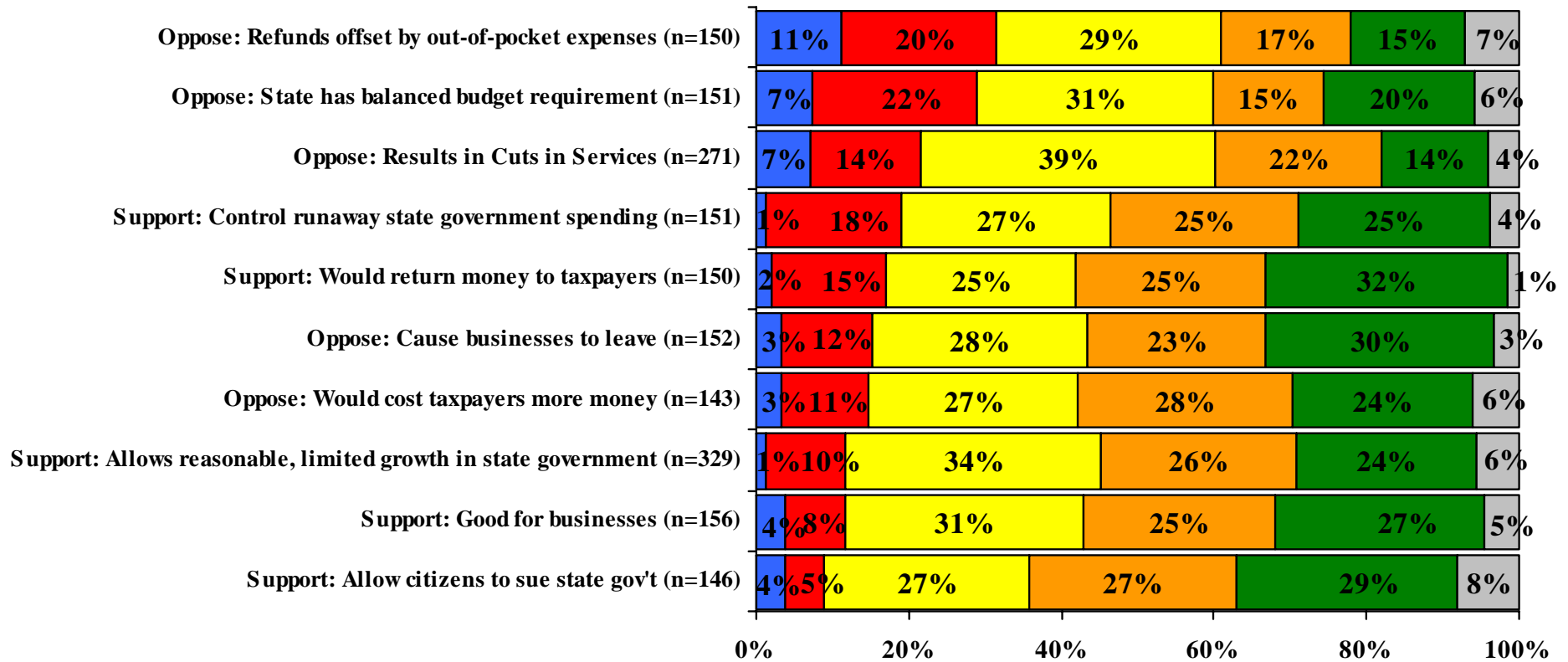
One-half of AARP Members in Montana state they would vote against the SOS proposal if the election were held today. In all, only two-fifths of Members say they would either probably or definitely vote for the proposal.

n=600



Q8. Next I'm going to read you some of the things that supporters of SOS Citizen Initiative-97 Proposal, also known as TABOR, say about the proposal and some of the things opponents say....I'd like you to please tell me whether you find it an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing.

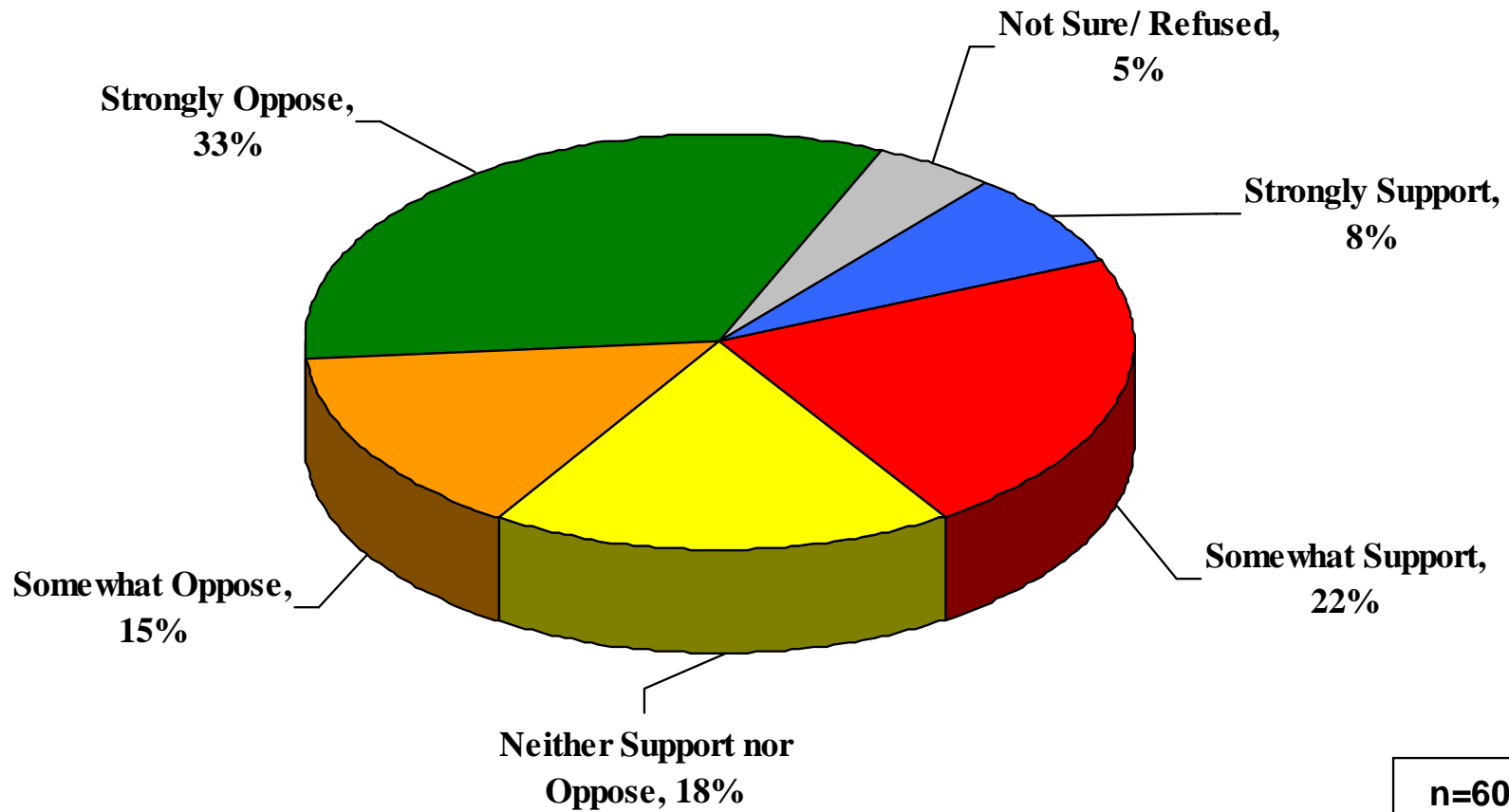
Although AARP Members find most of the arguments presented only somewhat convincing at best, they appear to be most persuaded by arguments that refunds from SOS will be offset by out-of-pocket expenses and the fact that the state government already has a balanced budget requirement.



■ Extremely Convincing
 ■ Very Convincing
 ■ Somewhat Convincing
 ■ Not Very Convincing
 ■ Not At All Convincing
 ■ Not Sure / Refused

Q9. Having heard arguments both for and against the SOS Citizen's Initiative-97 Proposal, now how strongly do you support or oppose SOS Citizen's Initiative-97 Proposal in Montana?

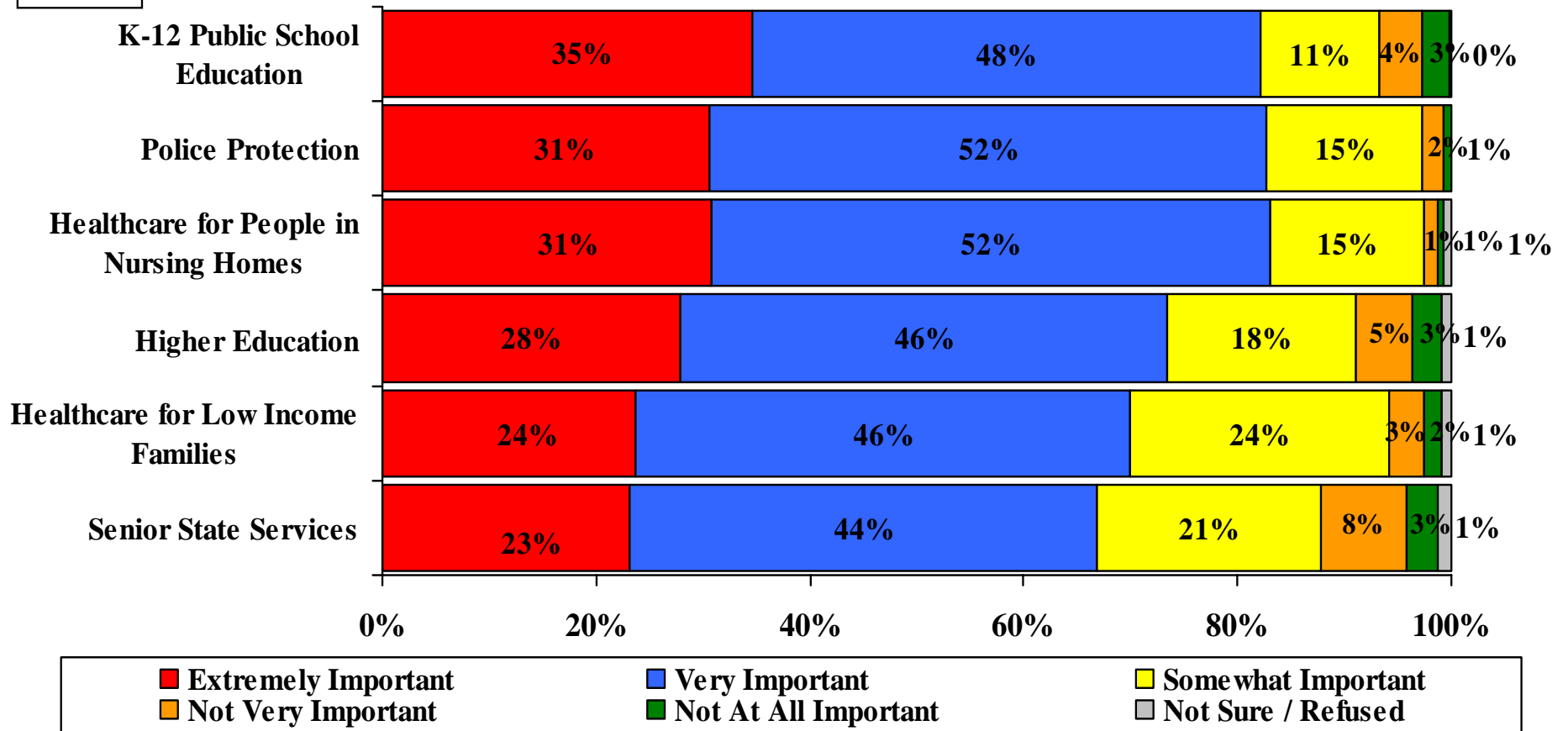
After hearing arguments both in support of and in opposition to the SOS proposal, one-half of AARP Members living in Montana say they oppose the proposal. In comparison, three out of ten Members say they support the SOS proposal.



Q10. Now, I am going to ask you about state and local services Montana provides. How important are each of the following to you? Are they extremely important, very important, somewhat important, not very important or not at all important?

AARP Members value K-12 public school education, police protection, and healthcare for people in nursing homes above all other state and local services presented. However, at least two out three Members in Montana consider all of these services to be at least “very important.”

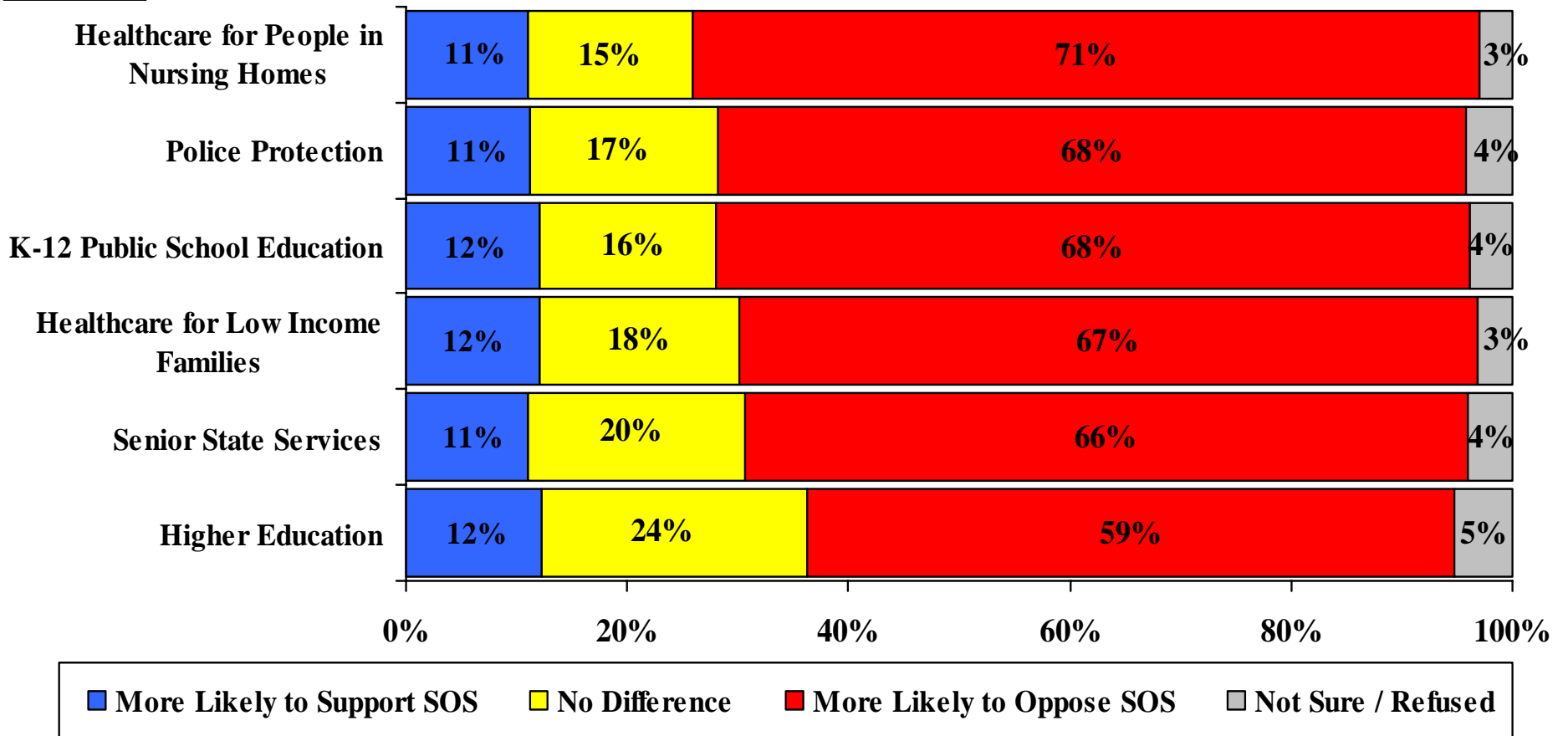
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Q11. If SOS Citizen Initiative-97 Proposal cut state funding for [each of the following services], would you be more likely to support the SOS Citizen initiative Proposal, more likely to oppose the proposal, or would it not make a difference?

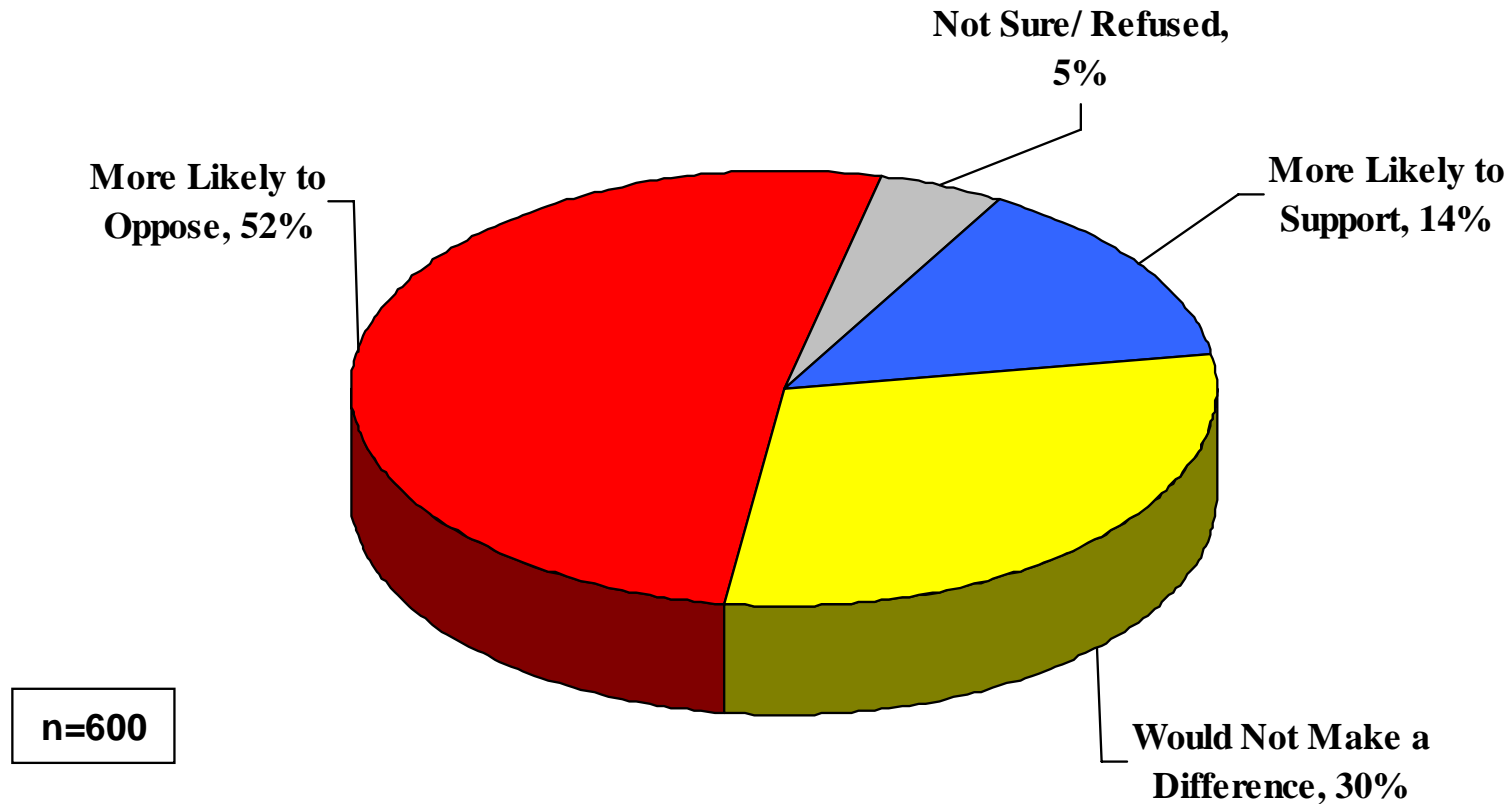
AARP Members would be more likely to oppose SOS if the proposal cut funding for healthcare for people in nursing homes, police protection, or K-12 public education.

n=600



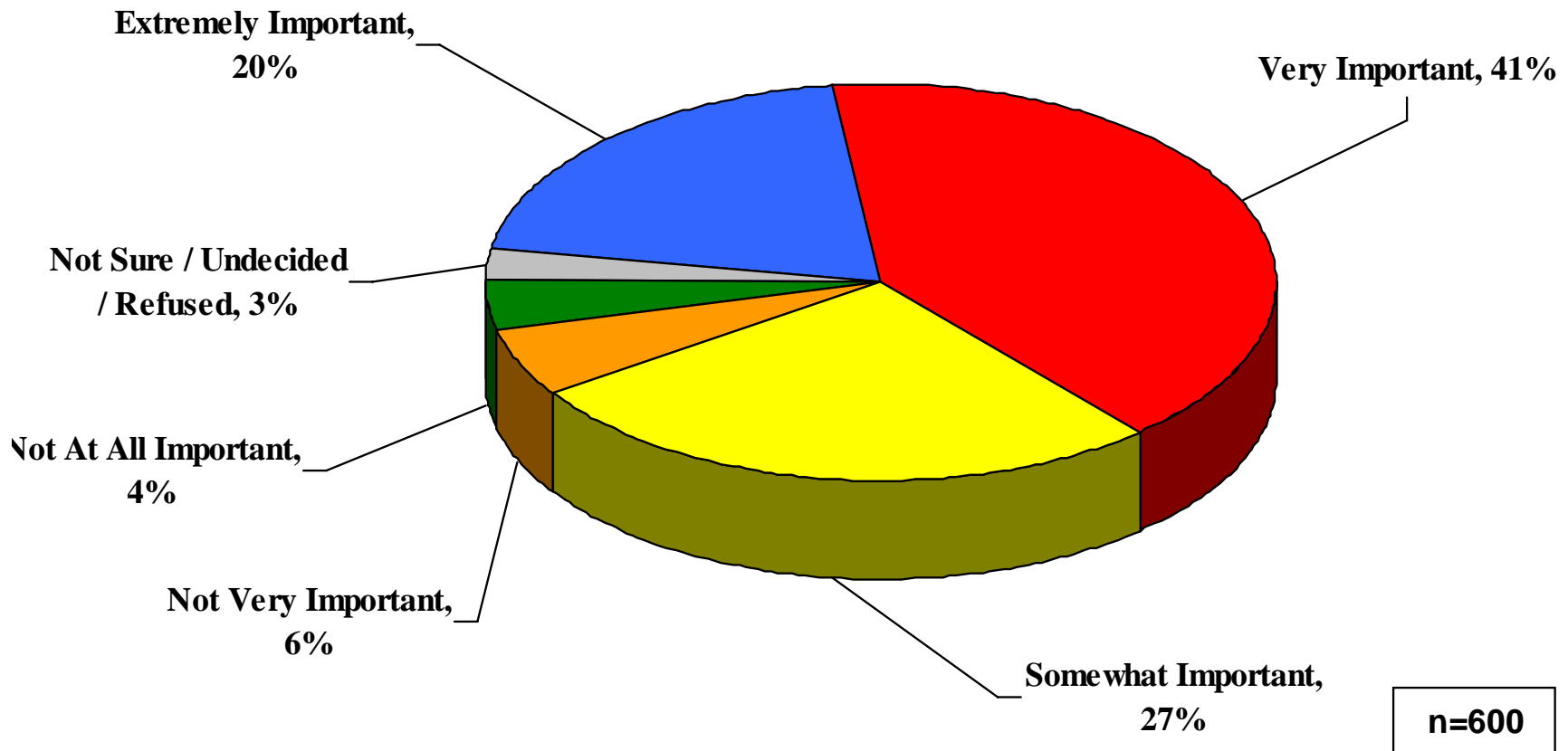
Q12. Suppose you learned that AARP and other senior organizations OPPOSED the SOS Citizen Initiative-97 Proposal, because they believe it would lead to significant cuts in important state services for Montana seniors and their families. Would you be more likely to support the SOS Citizen Initiative-97 Proposal, more likely to oppose, or would it not make a difference in how you vote for the proposal?

One-half of AARP Members living in Montana say that knowing AARP and other senior organizations oppose SOS would lead them to oppose SOS. Three out of ten said it would not make a difference in how they voted.



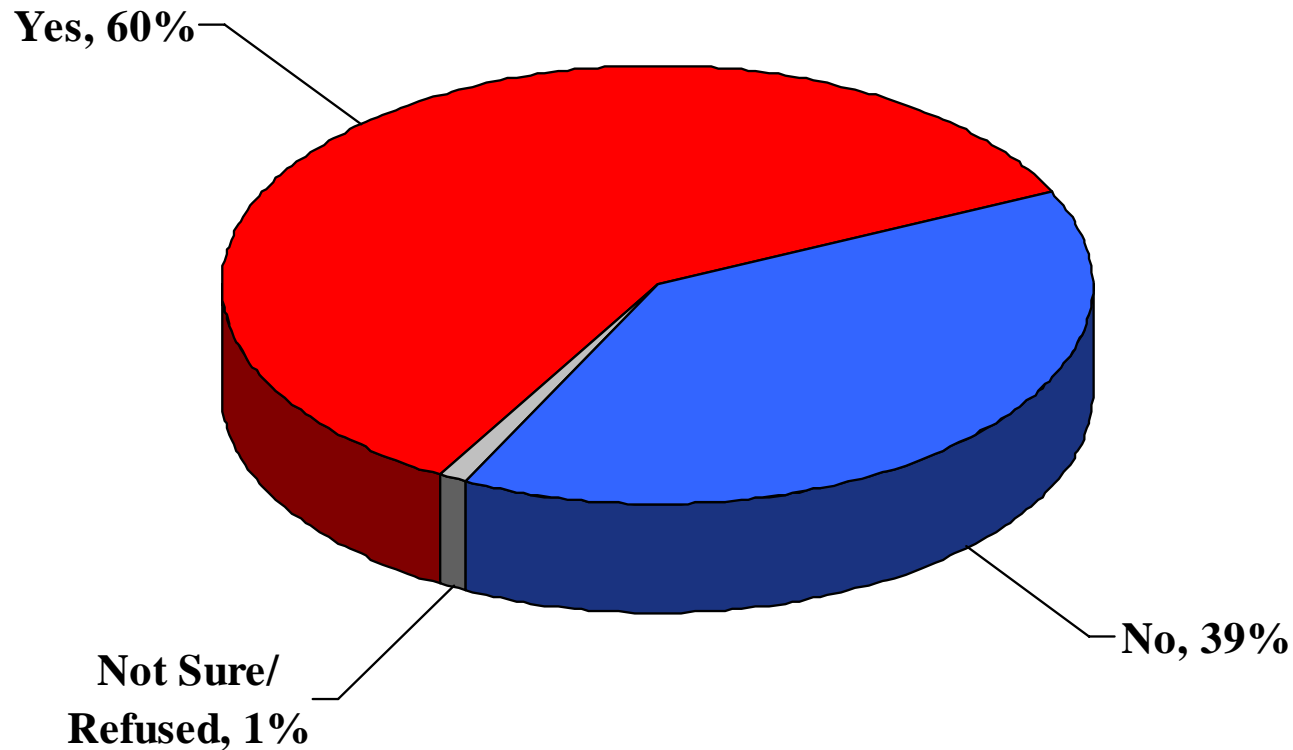
Q17. How important is it to you that the State of Montana has a balanced budget amendment in the constitution saying Montana's Annual spending budget shall not exceed its anticipated revenues? Would you say it is extremely important, very important, somewhat important, not very important, or not at all important?

Three out of five AARP Members in Montana state it is either "extremely important" or "very important" to them that Montana have a balanced budget amendment. Only one out of ten suggest this is not important.



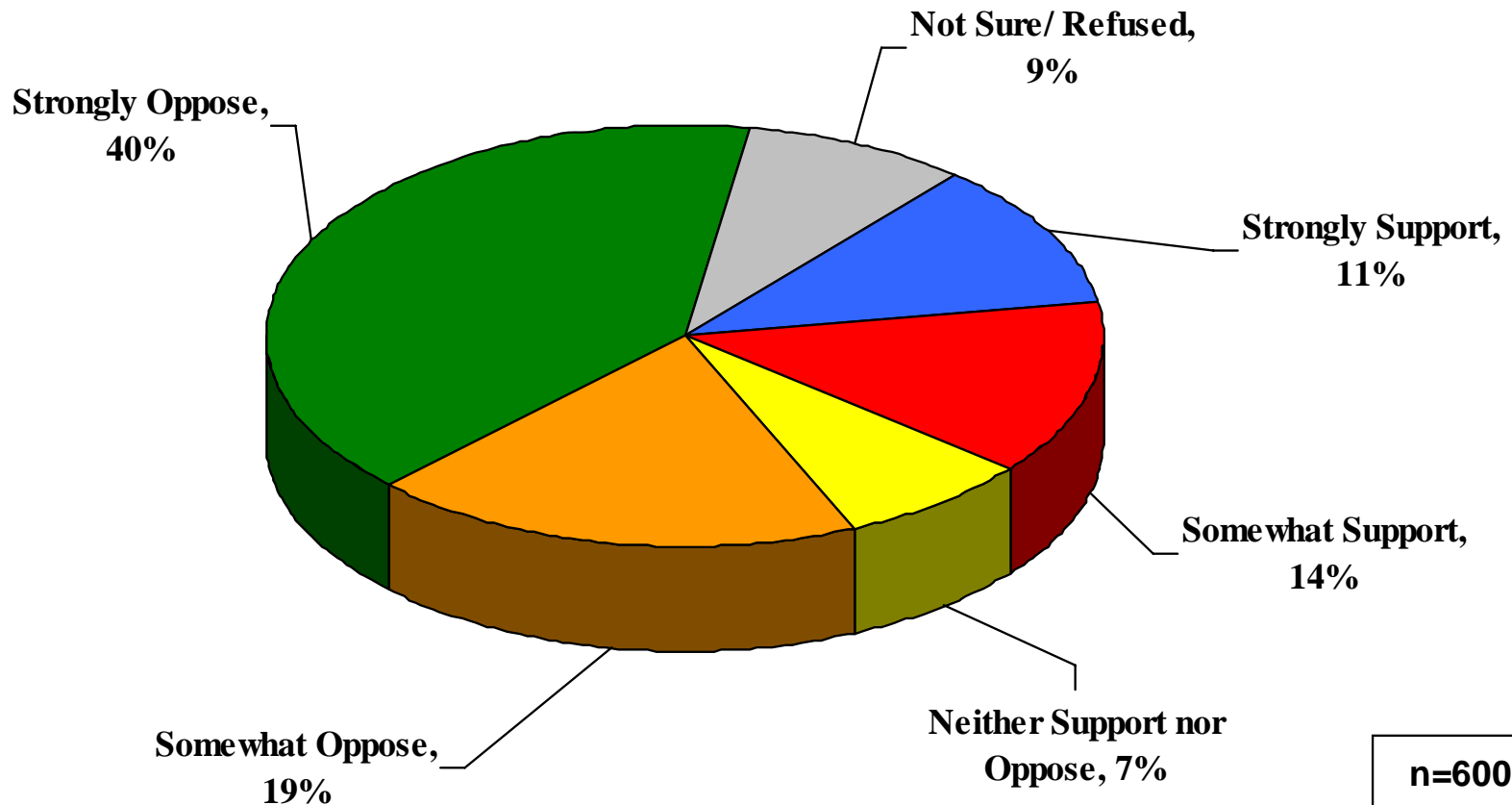
Q18. Did you know that the Montana constitution already has a provision requiring an annual balanced budget?

Three-fifths of AARP Members in Montana indicate they are aware of the existing provision in the Montana constitution requiring an annual balanced budget.



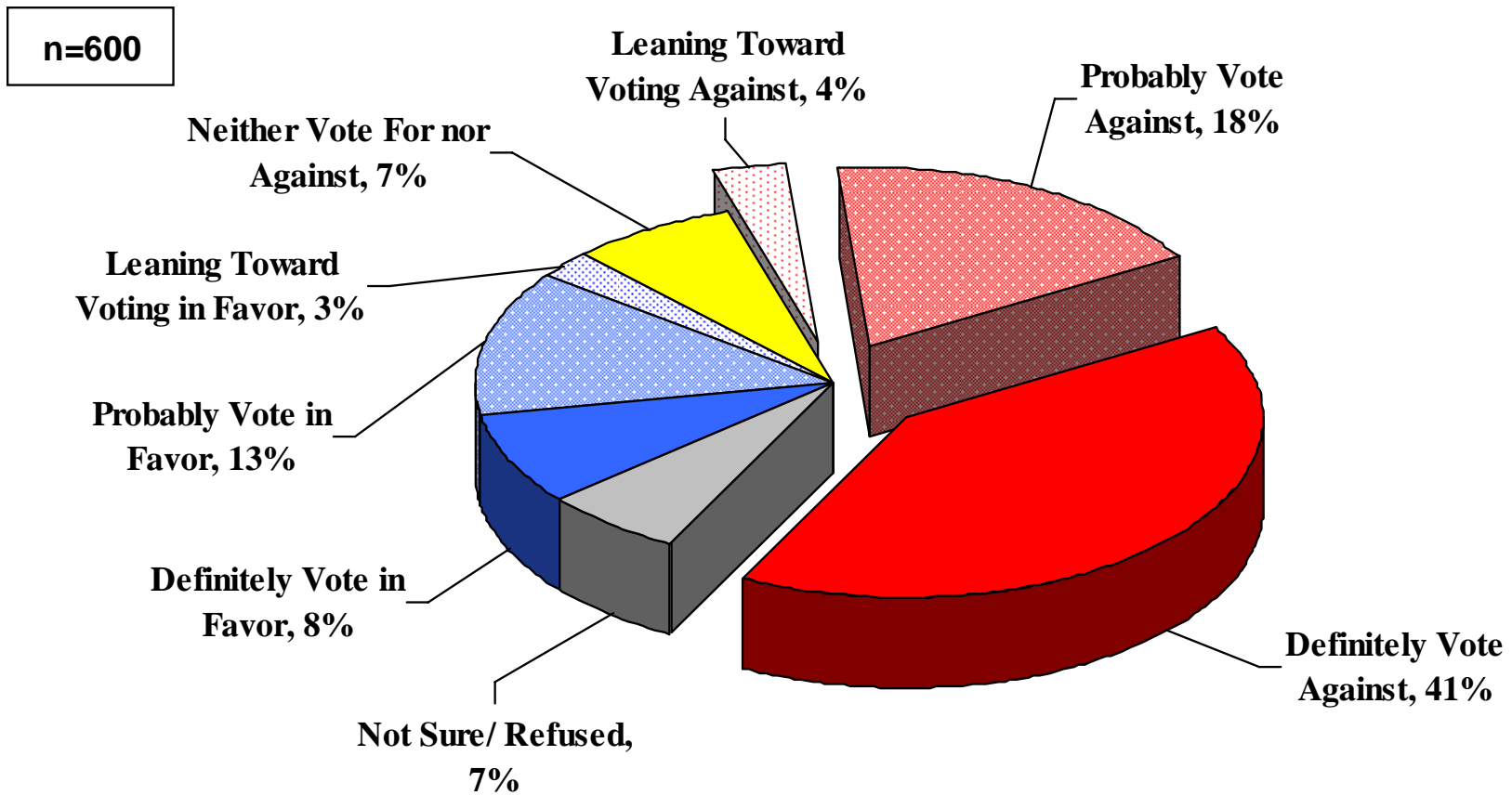
Q19. Currently in Montana, there is an effort to pass an amendment to the constitution called Stop OverSpending (SOS). The SOS initiative would limit state spending. Given that Montana already has a balanced budget amendment to the state constitution, do you support or oppose the Stop OverSpending initiative?

Three out of five AARP Members say they would oppose the SOS initiative given Montana already has a balanced budget amendment.



Q13 & Q14. Now thinking about all the information we have discussed about this proposal that may be on the ballot in November, if the election were held today, would you vote for or against this proposal? [IF INITIALLY UNDECIDED ASK: Well, if you had to decide right now, which way would you say you are leaning—toward voting in favor or toward voting against?"]

Though one-fourth of AARP Members in Montana (24%) say they are at least leaning toward voting for the SOS Proposal, more than three-fifths of Members (62%) suggest they are leaning toward voting against the proposal.

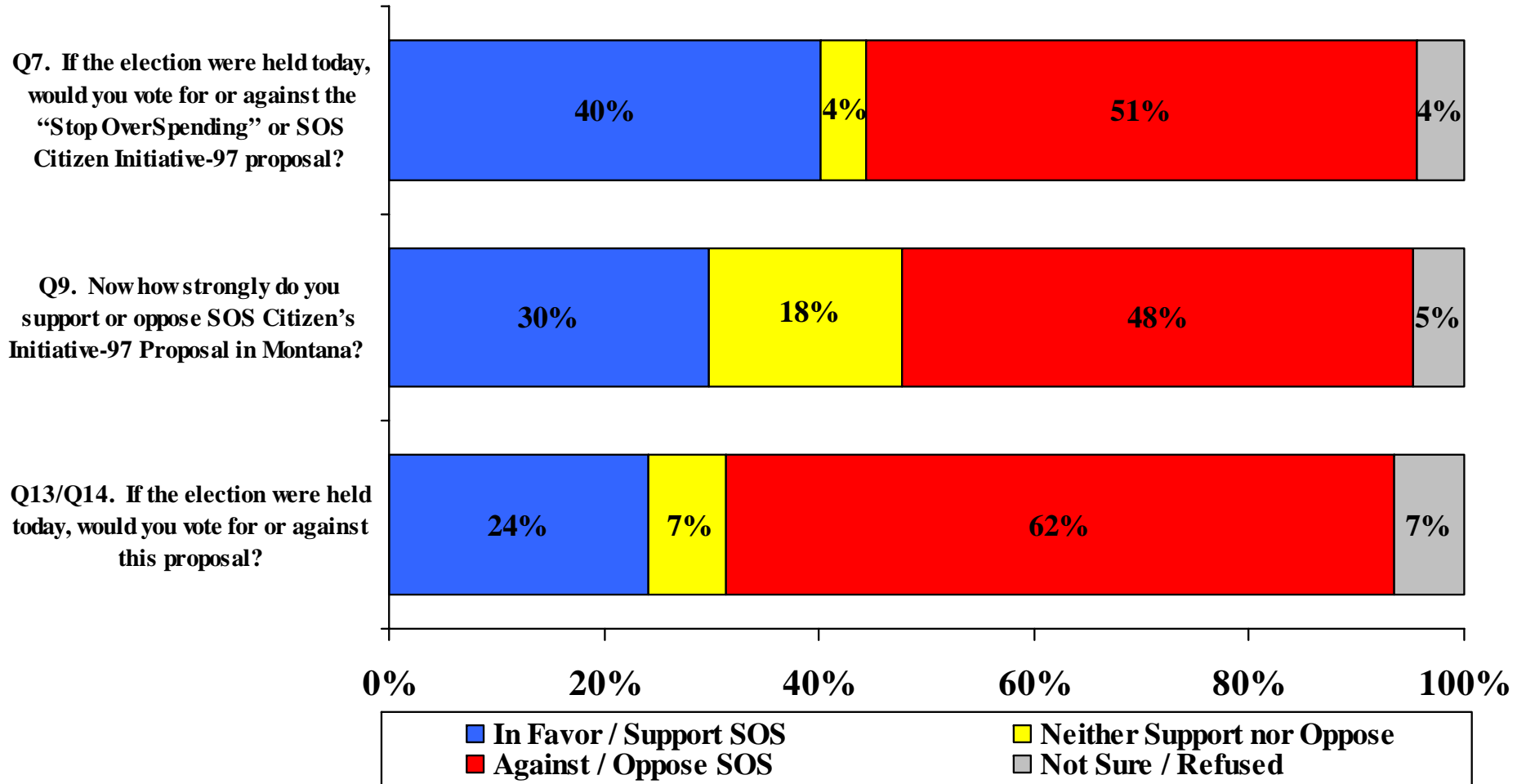


SOS Support/Oppose Summary Chart



SOS SUPPORT/OPPOSE THROUGHOUT SURVEY

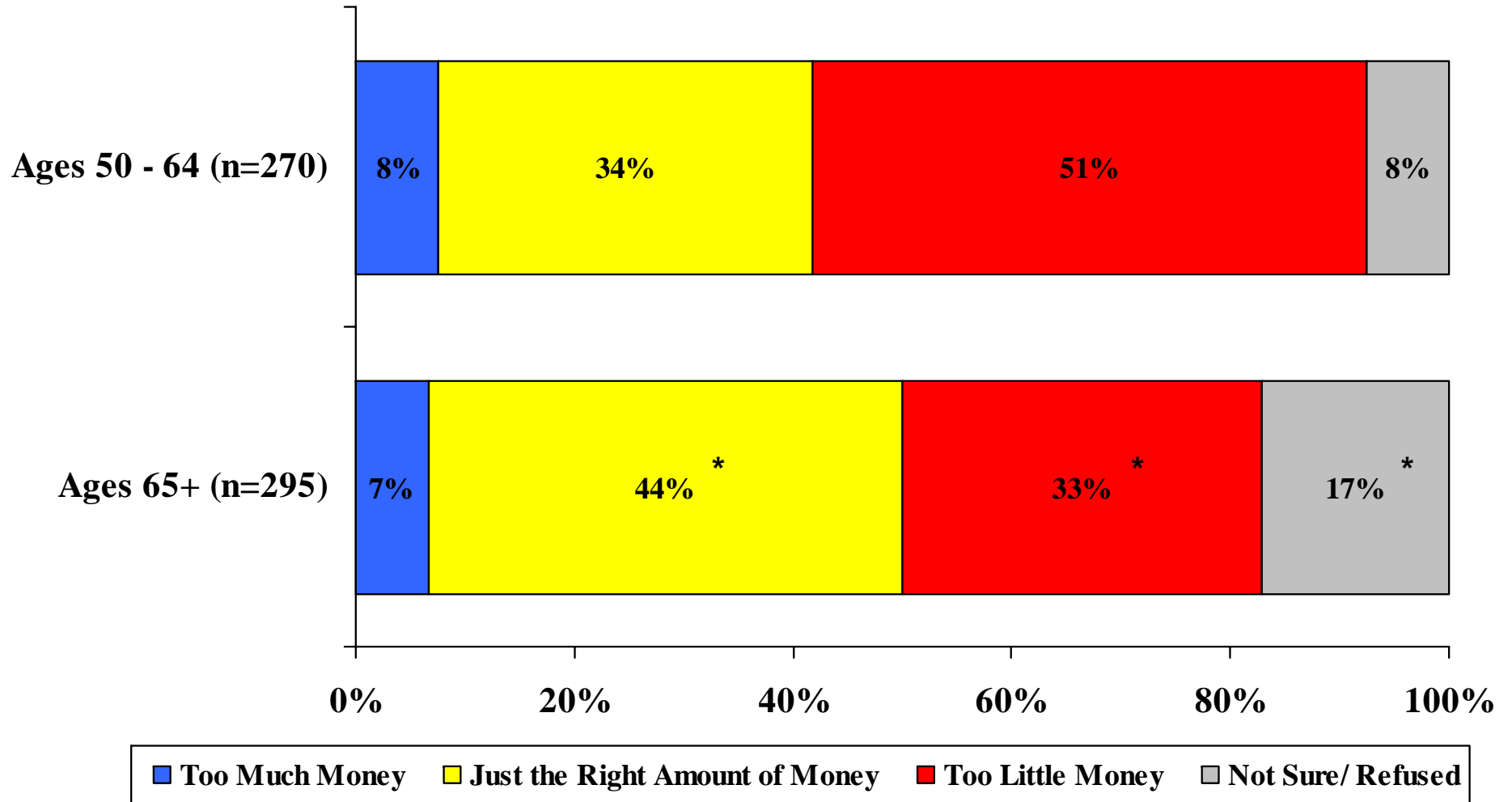
Comparison of the three questions asking about support for or against SOS reveals a statistically significant decline in support for SOS between the initial measure and the last measure in the survey.



Subgroup Analysis: Survey Responses by Age

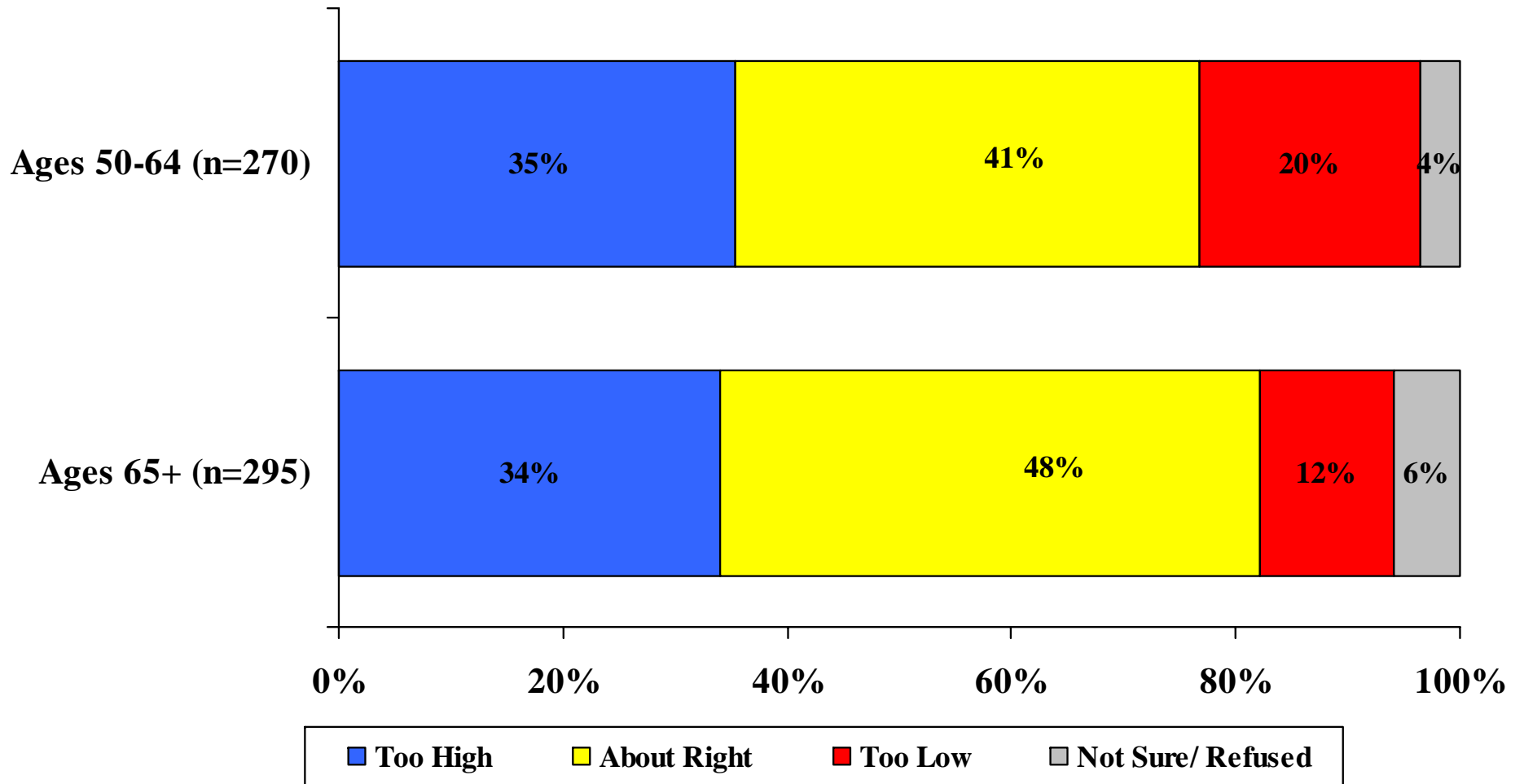


Q1. Do you think that Montana is spending too much money, too little money, or just the right amount of money on state services such as keeping people safe, providing health and long-term care, repairing roads and highways, maintaining parks, and providing education?



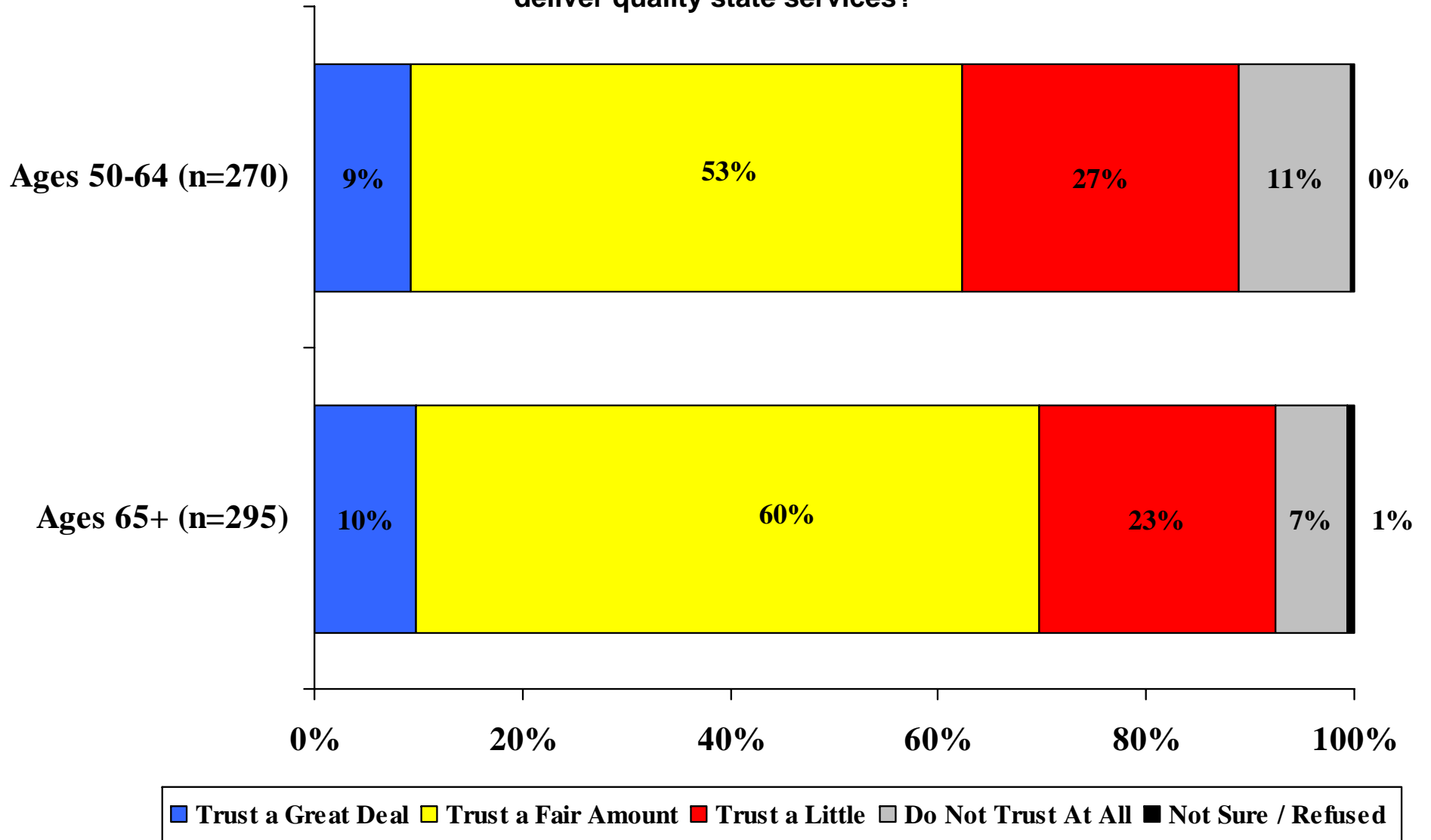
* Statistically significant difference from Members aged 50 to 64 at the 95% level of confidence

Q2. Thinking about the state and local taxes that you pay, not including federal taxes, do you think that taxes in Montana are too high, are about right, or are too low to support state services?



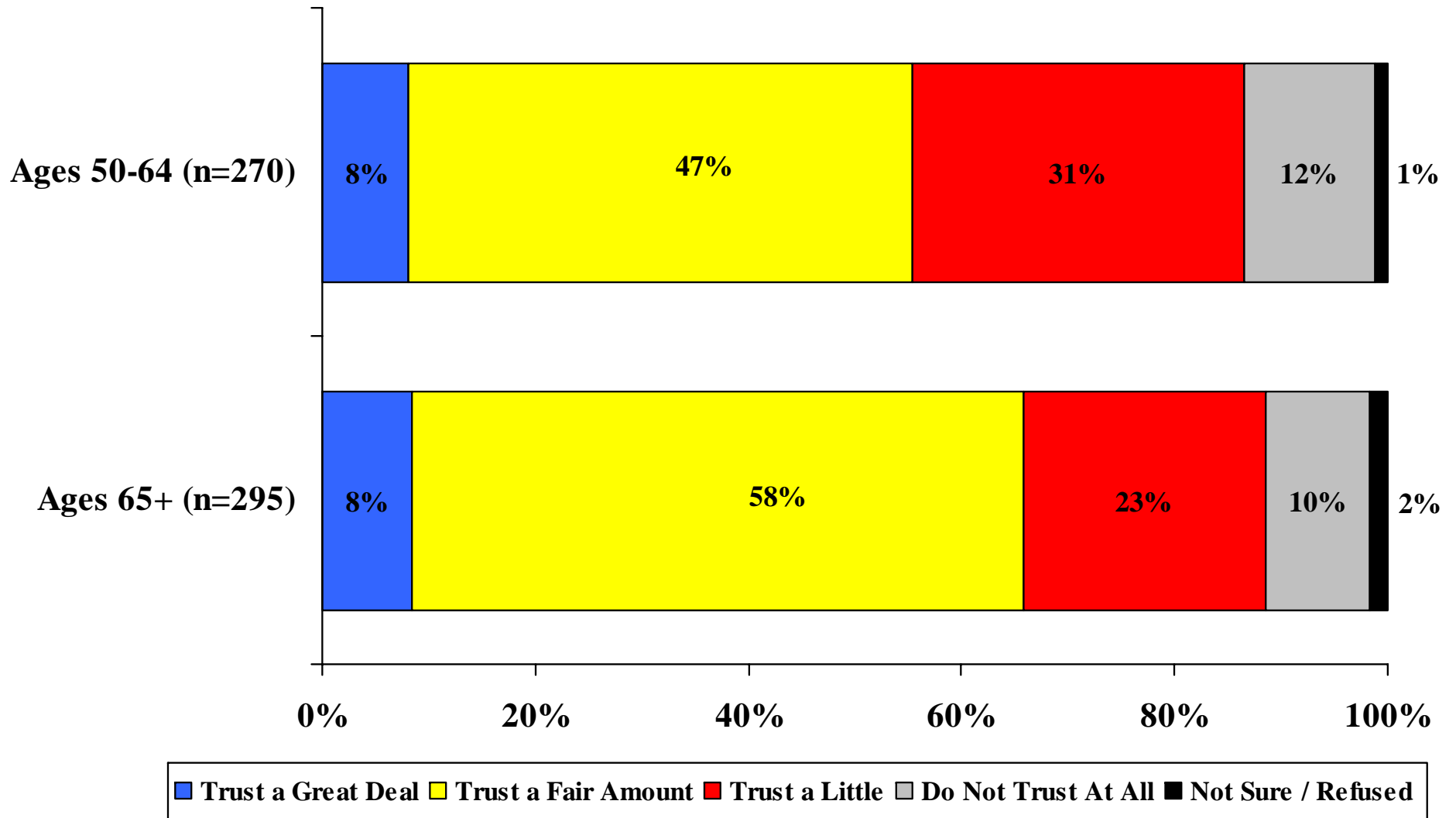
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q3a. How much do you trust your state government to use your tax money effectively and deliver quality state services?



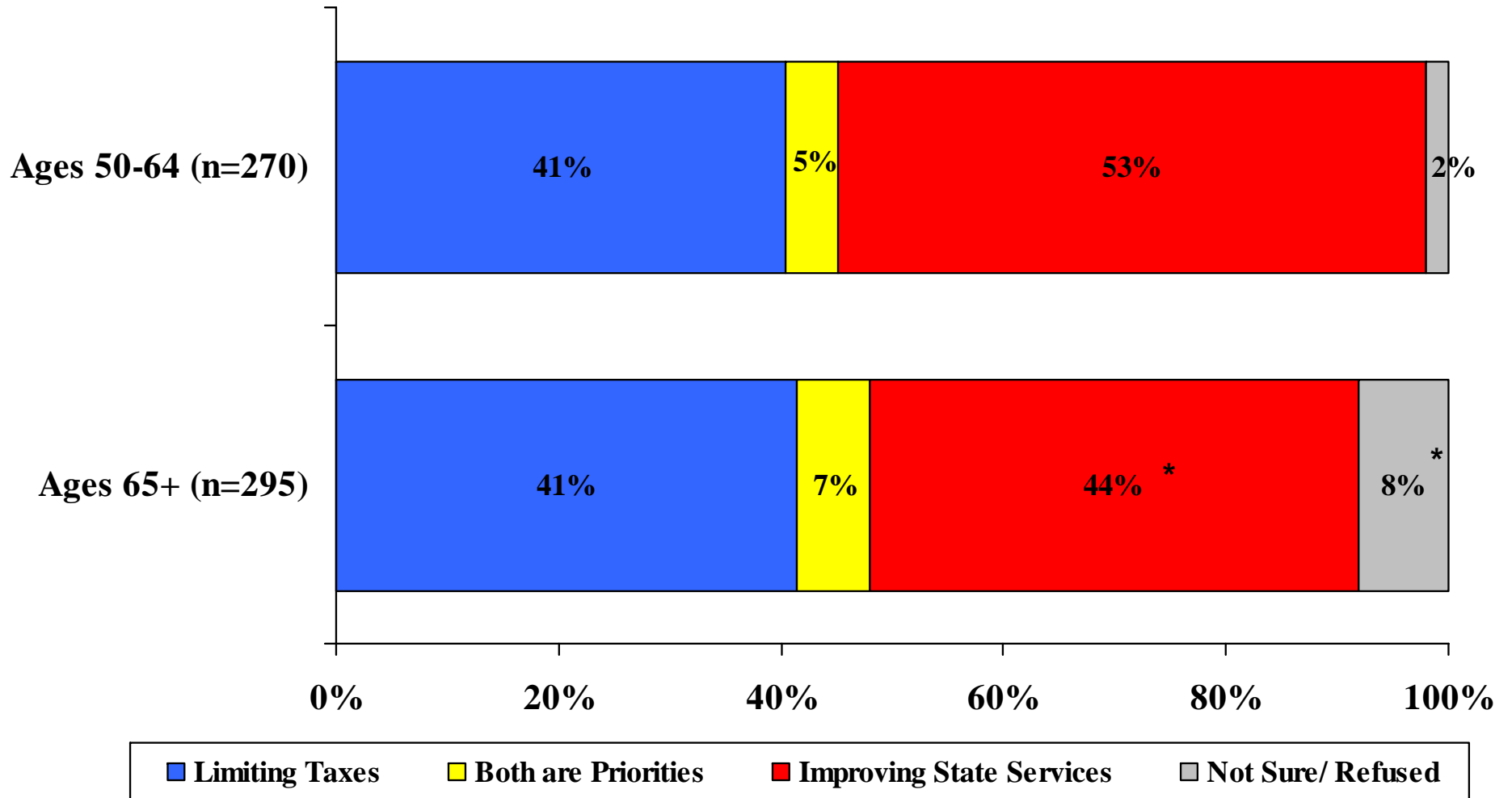
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q3a. How much do you trust your local government (includes Towns, Cities, and Counties) to use your tax money effectively and deliver quality state services?



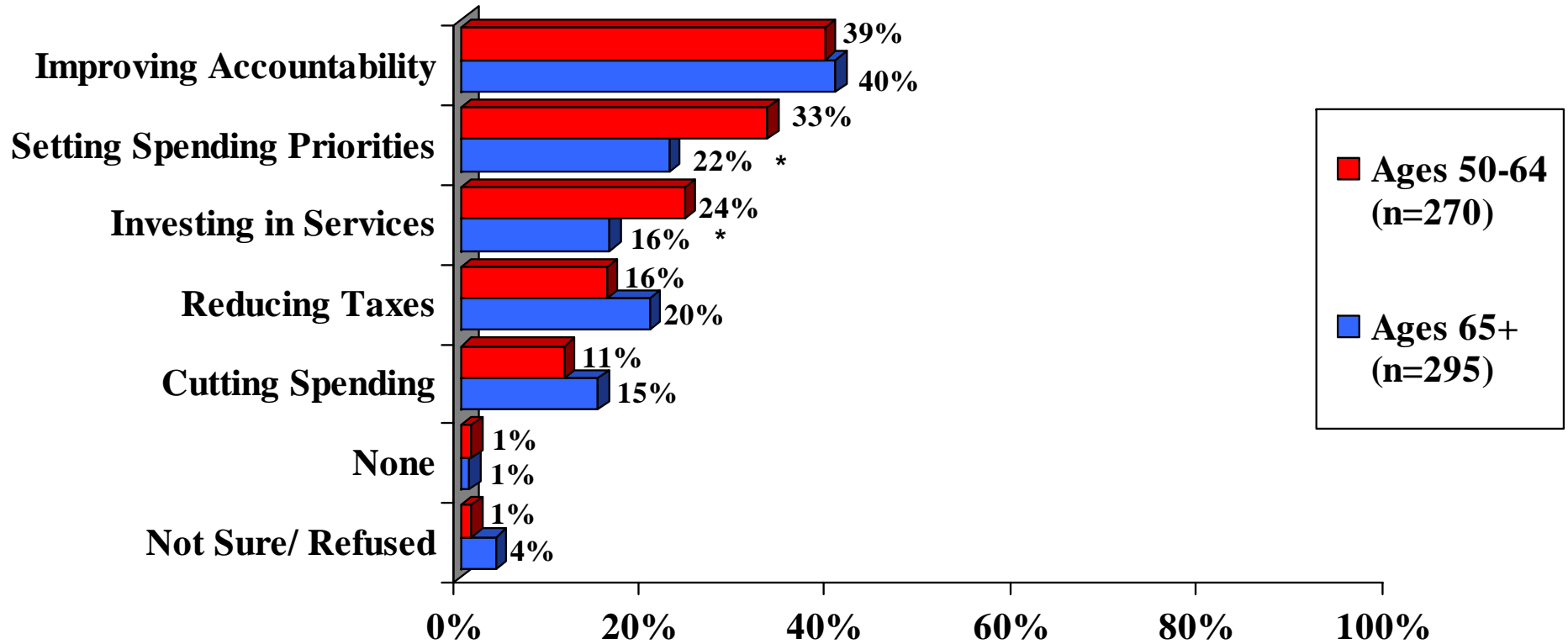
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q4. In Montana, which is a higher priority for you...?



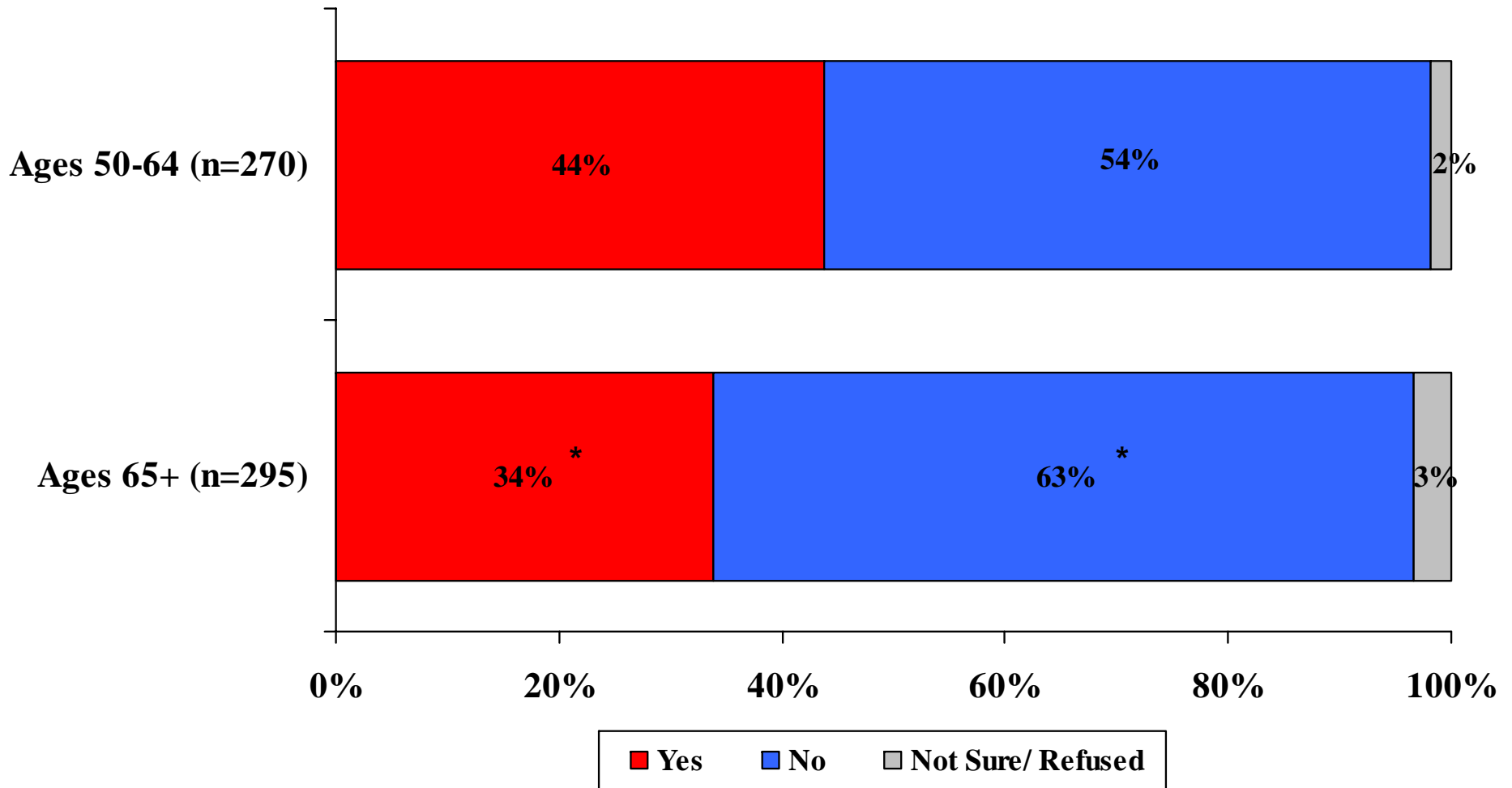
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q5. Thinking about state government today in Montana, which one or two of the following goals are most important to you?



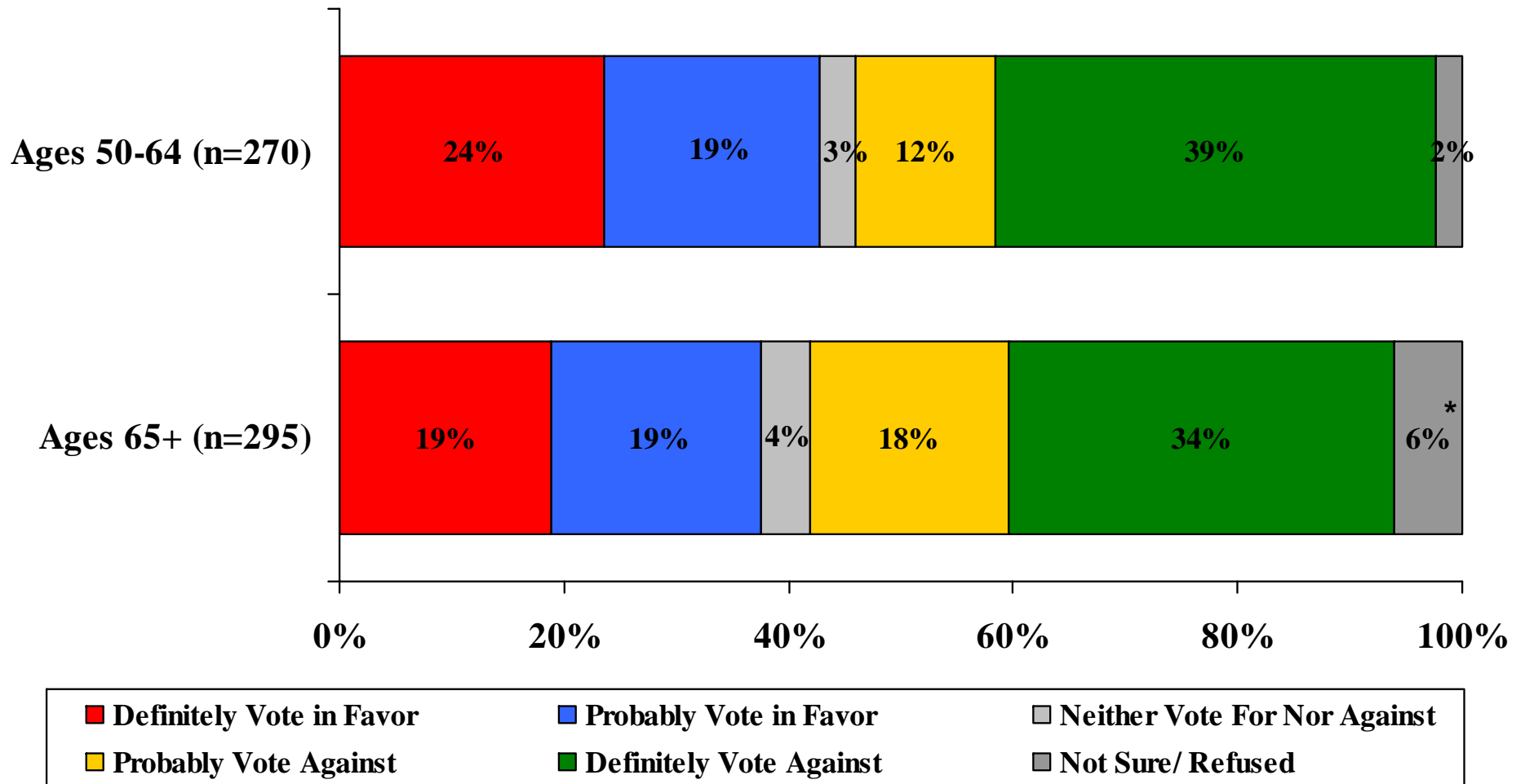
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q6. Have you seen, read, or heard anything about Montana's Stop OverSpending or SOS Citizen Initiative-97 proposal, also known as the Taxpayer Bill of Rights, or TABOR proposal in the last year?



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

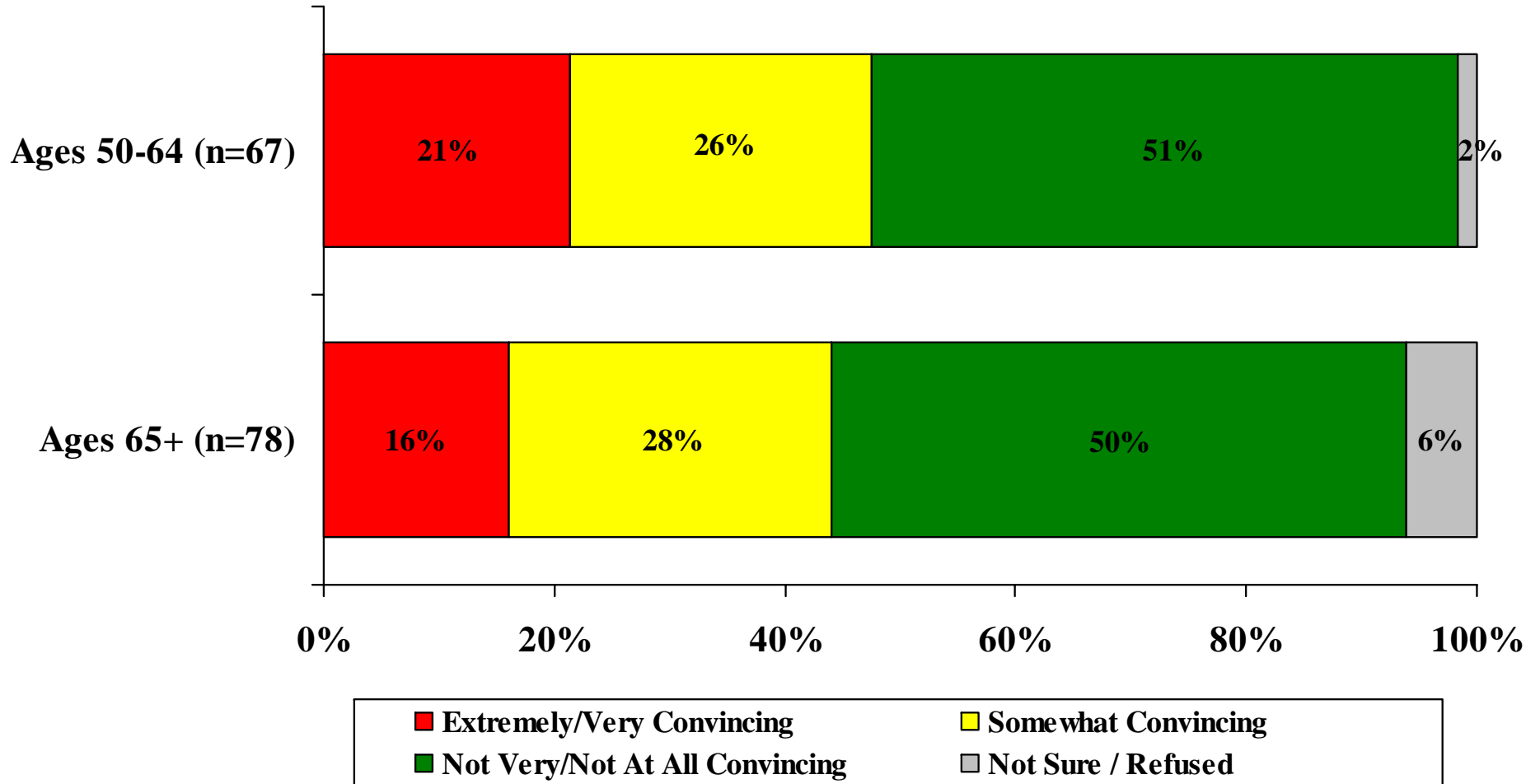
Q7. Given what you know about the proposal, if the election were held today, would you vote for or against the “Stop OverSpending” or SOS Citizen Initiative-97 proposal?



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q8a1. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

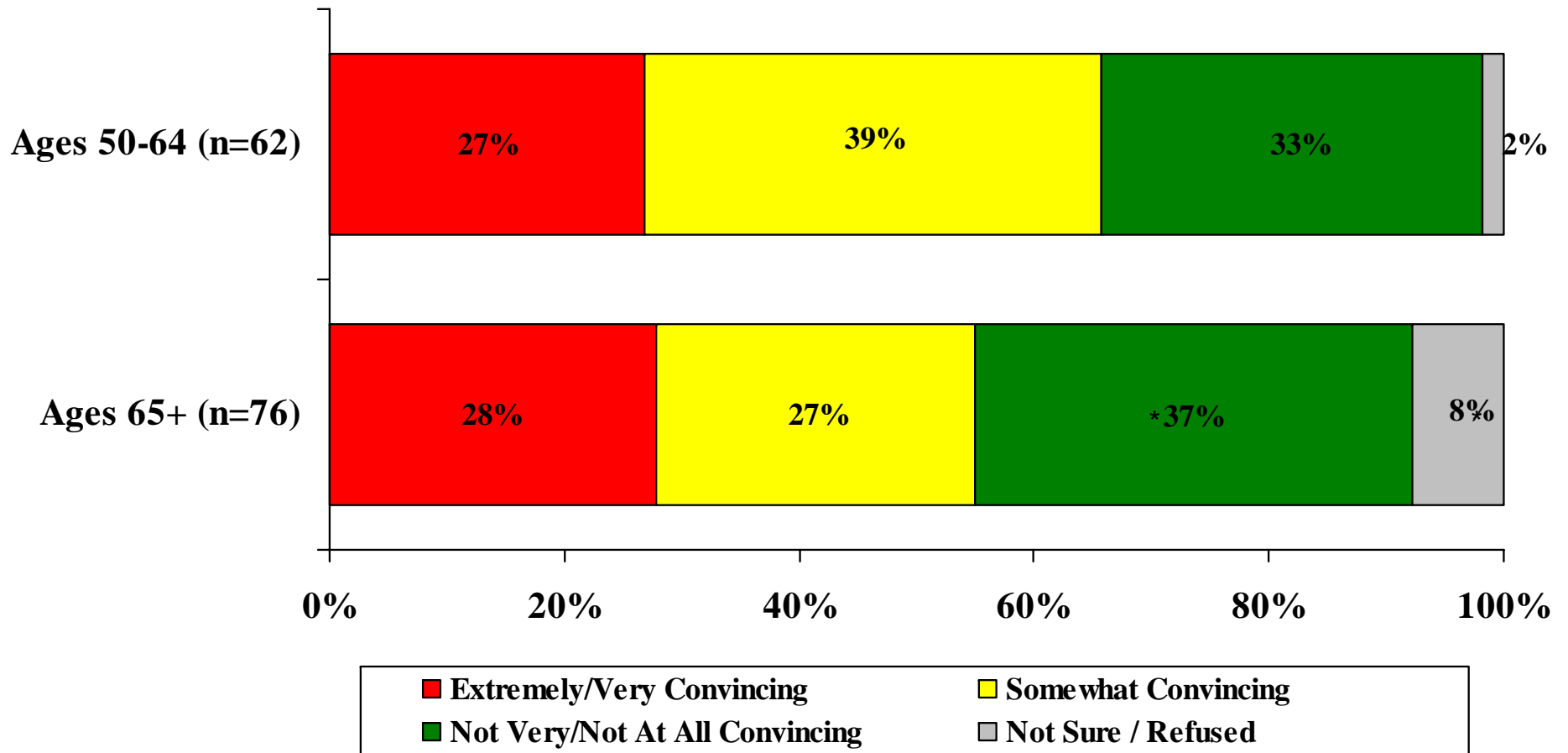
Supporters of SOS Citizen Initiative-97 Proposal say that it would control runaway state government spending and force the state government to operate more efficiently.



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q8a2. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

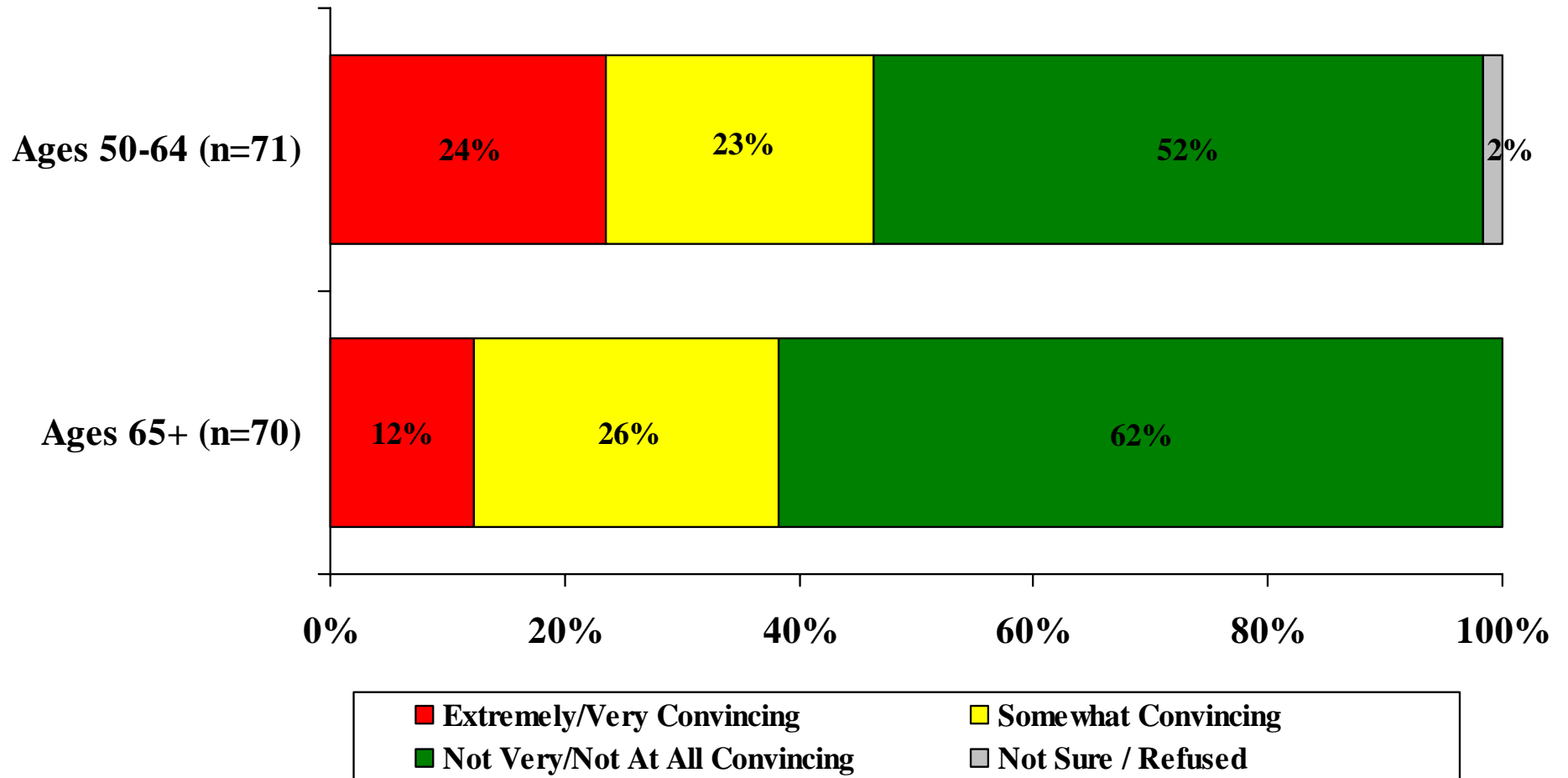
Opponents of SOS Citizen Initiative-97 Proposal say the state already has a balanced budget requirement, voters can already control state government actions at the ballot box, and that SOS Citizen Initiative-97 Proposal would decrease the quality of life in Montana, forcing major cuts in health, education, transportation, and public safety.



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q8b1. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

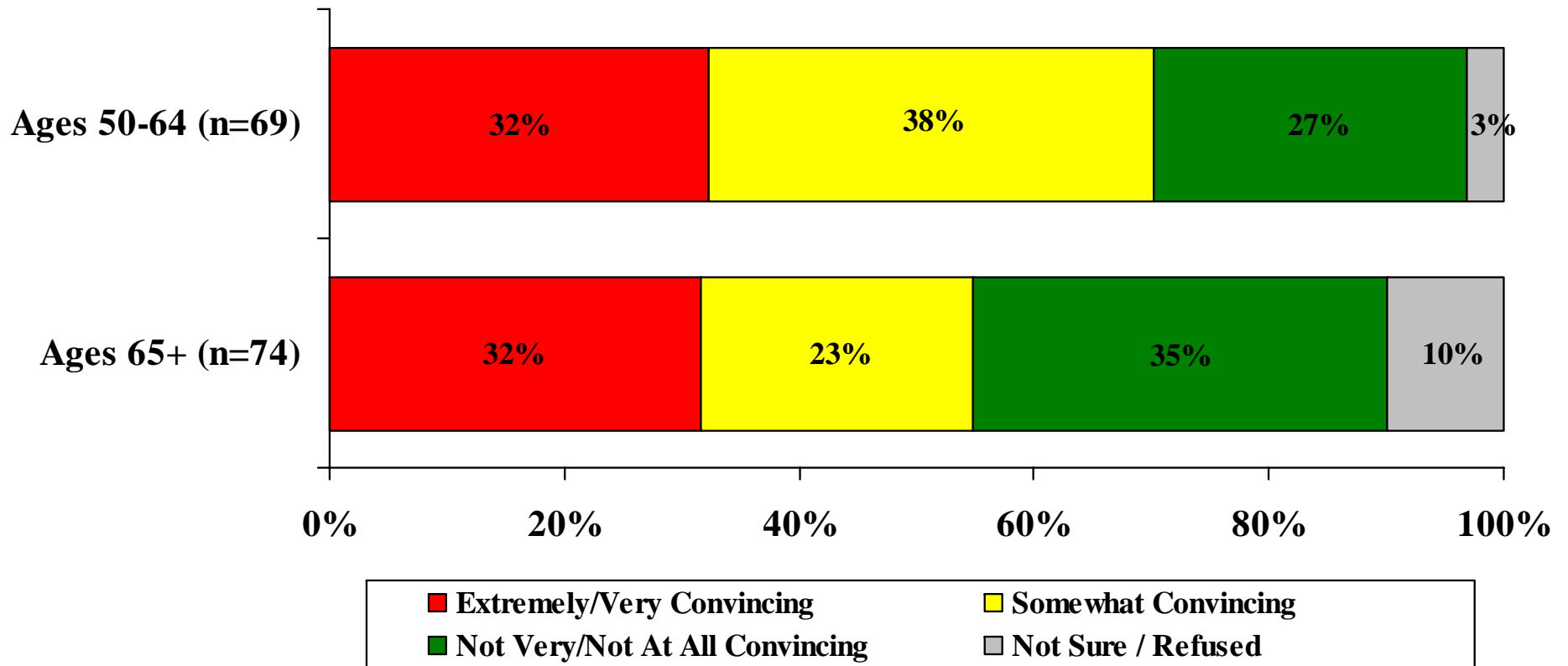
Supporters of SOS Citizen Initiative-97 Proposal say that it would help the Montana economy by returning money to taxpayers through tax rebates and tax cuts.



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q8b2. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

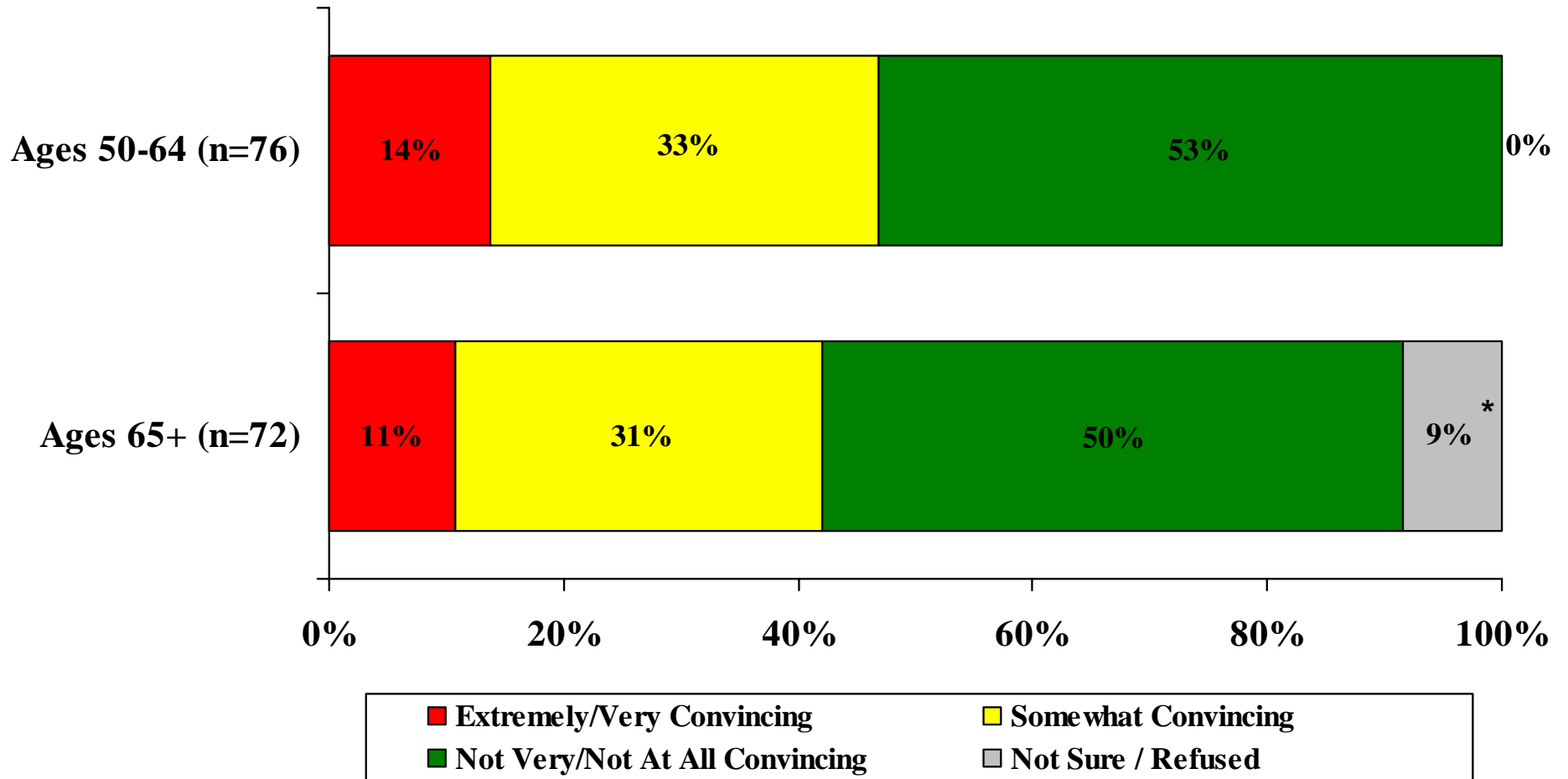
Opponents of Montana's SOS Citizen Initiative-97 Proposal say that any money refunded to tax payers would be more than offset by the increased out-of-pocket expense they would bear. In Colorado, the only state that has passed TABOR, fees have increased for licenses and park admissions. Also, families have had to pay for items that schools typically provided such as textbooks and basic school supplies, while children attended classes wearing coats because heat had been dramatically lowered.



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q8d1. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

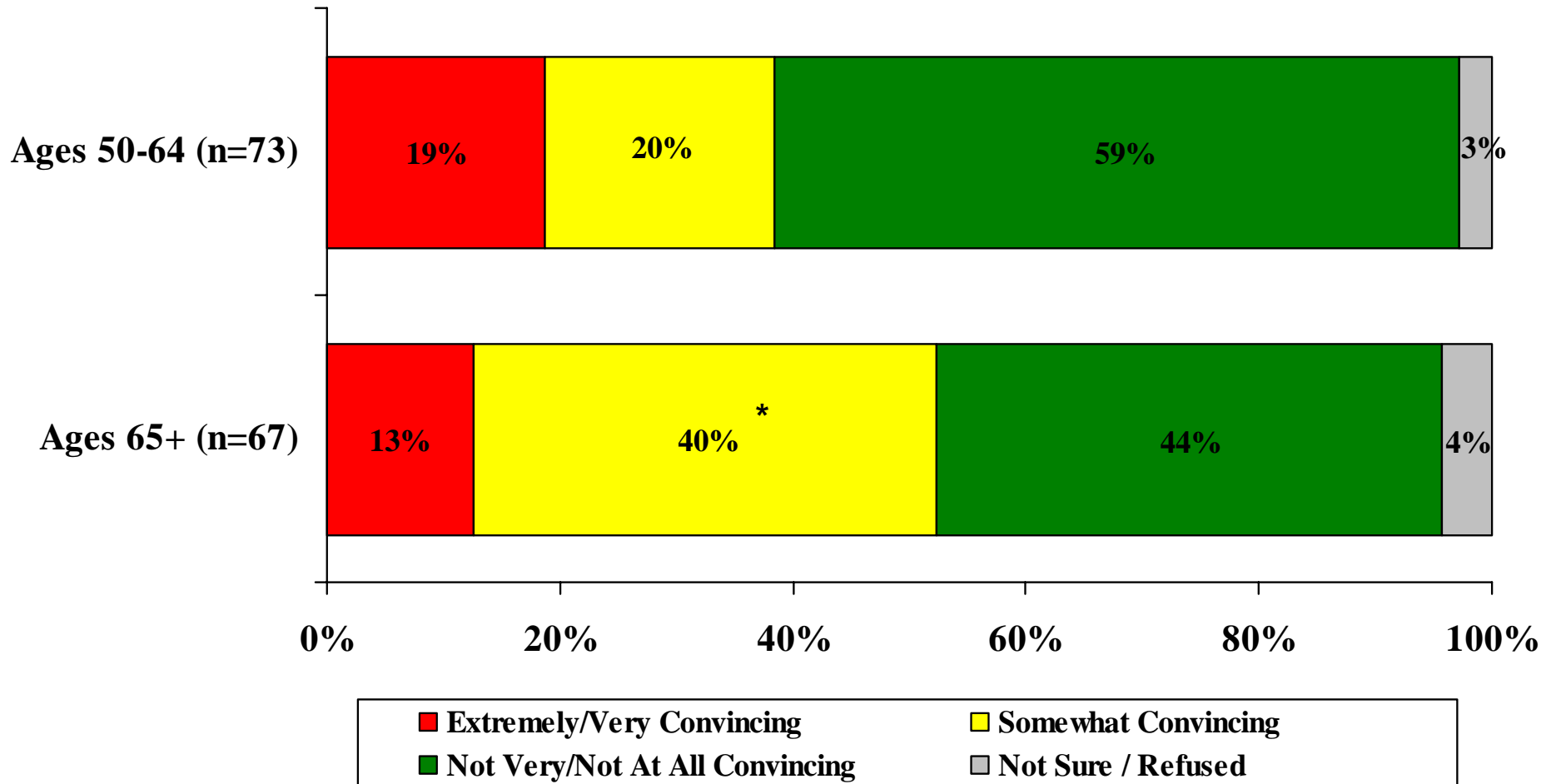
Supporters of Montana's SOS Citizen Initiative-97 Proposal say that it would be good for business because it would lower the taxes businesses have to pay to operate in the state.



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q8d2. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

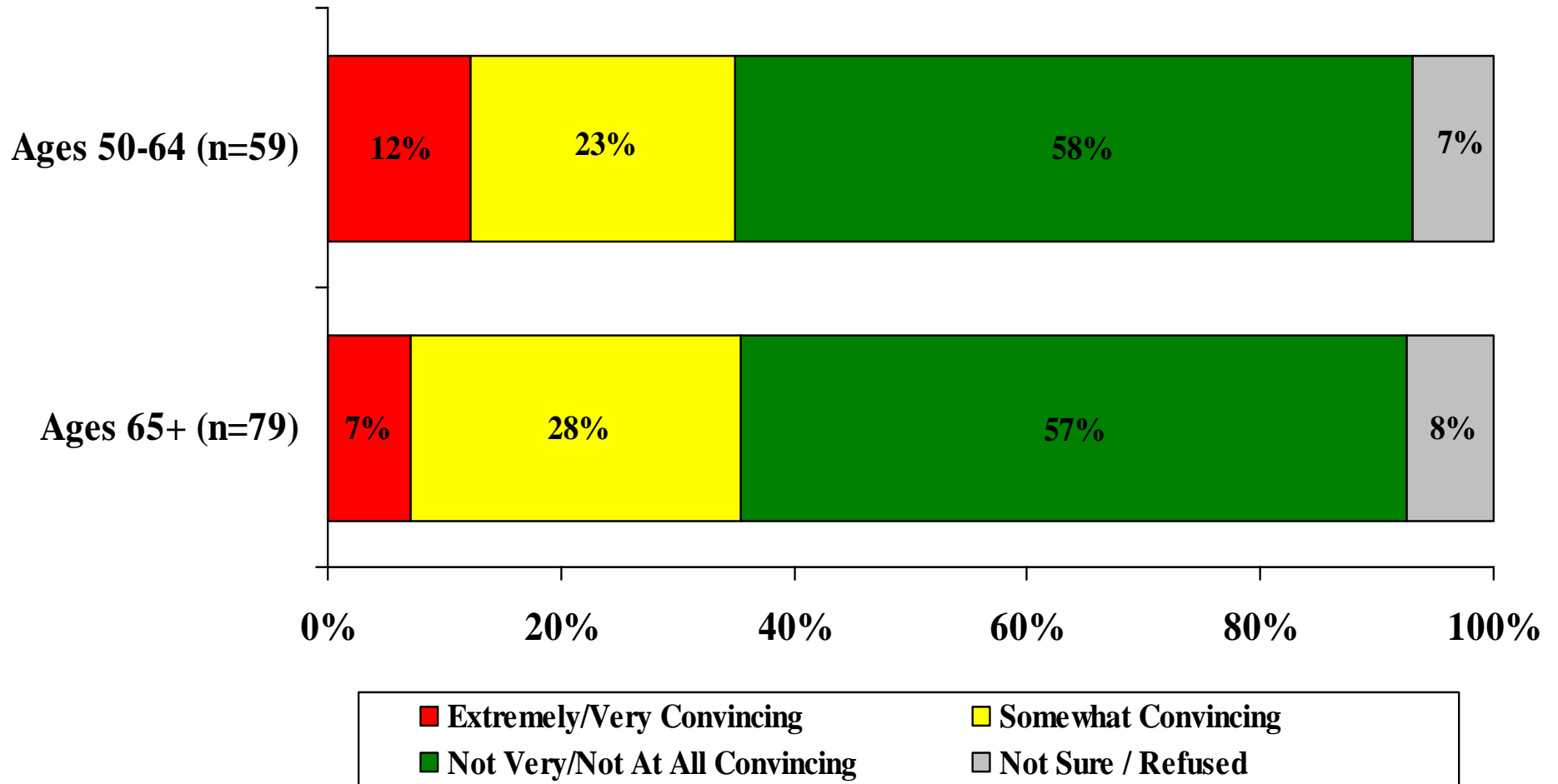
Opponents of Montana's SOS Citizen Initiative-97 Proposal say that it would cause businesses to leave or prevent them from relocating to Montana because the declining quality of life would drive desirable job applicants out of the state.



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q8e1. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

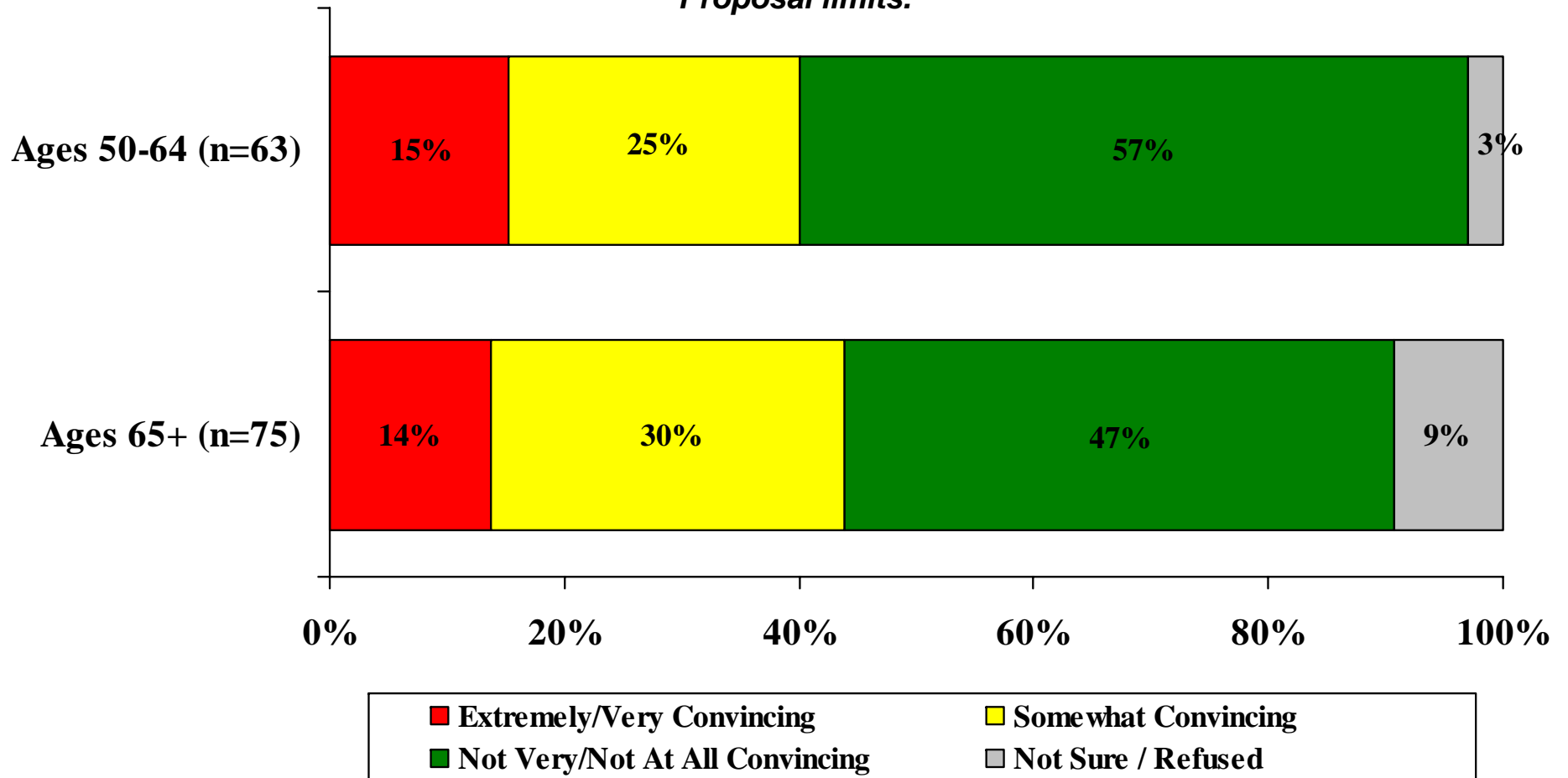
Supporters of the SOS Citizen Initiative-97 Proposal say that it would allow citizens and anyone doing business in Montana to sue state government if they believe SOS Citizen Initiative Proposal limits are not being met.



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q8e2. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

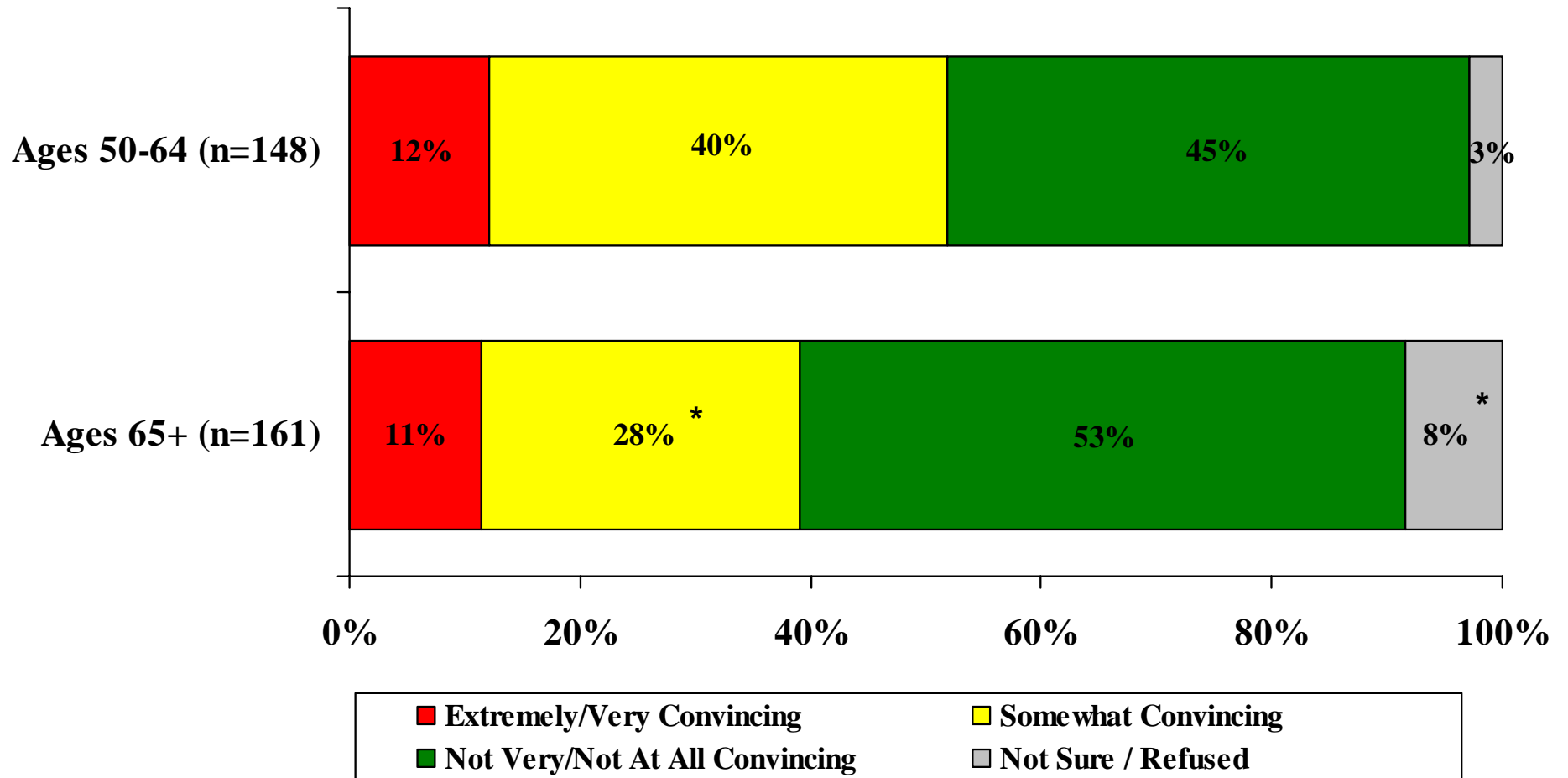
Opponents of the SOS Citizen Initiative-97 Proposal say that it would cost taxpayers more money and would cause further strains on the state budget to pay court costs and attorney fees if out-of-state corporations and Montana citizens could sue for enforcement of SOS Citizen Initiative-97 Proposal limits.



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q8f1. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

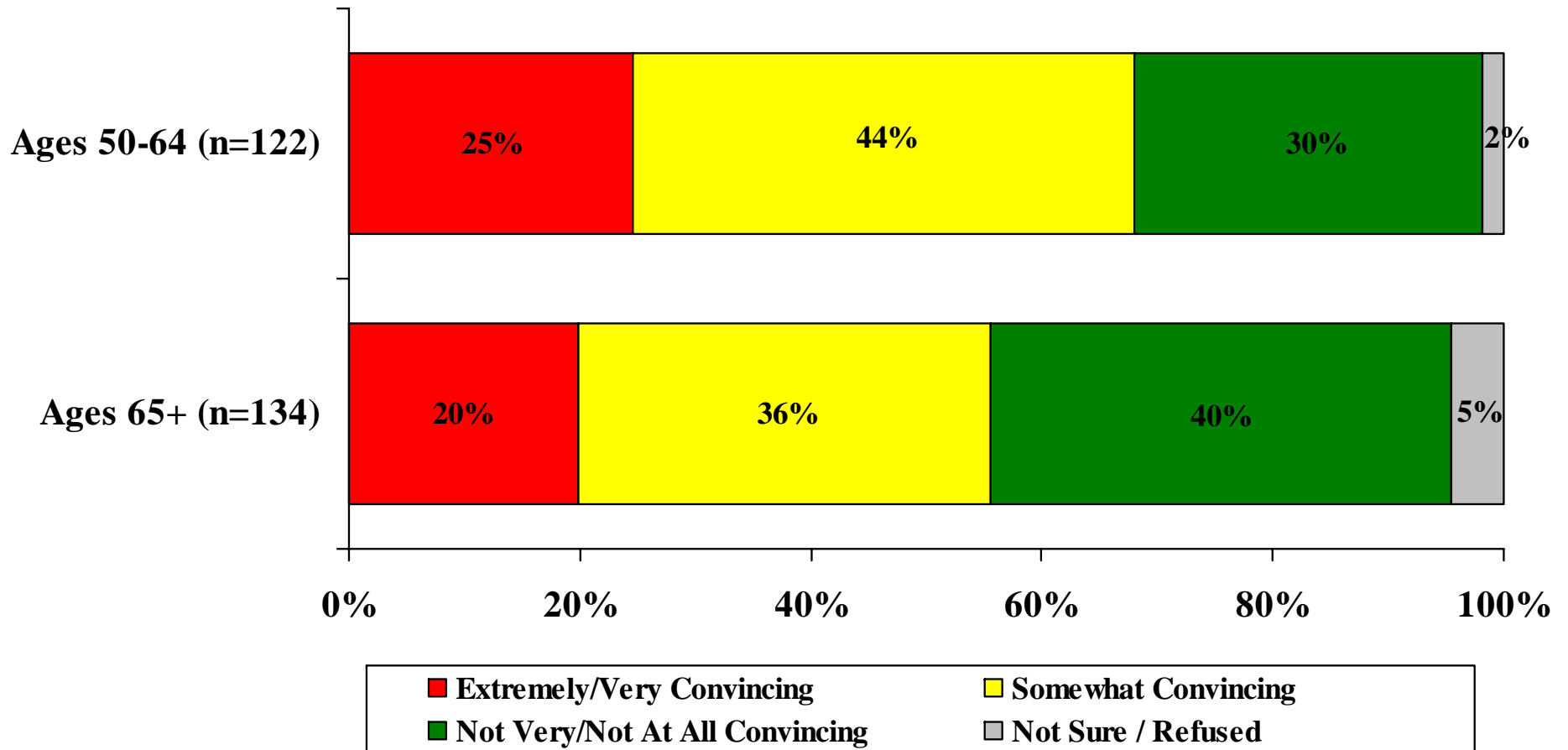
Supporters of SOS Citizen Initiative-97 Proposal say that it would allow for reasonable, limited growth in state government and would not limit spending of federal funds, state special revenues, or limit spending by local government.



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

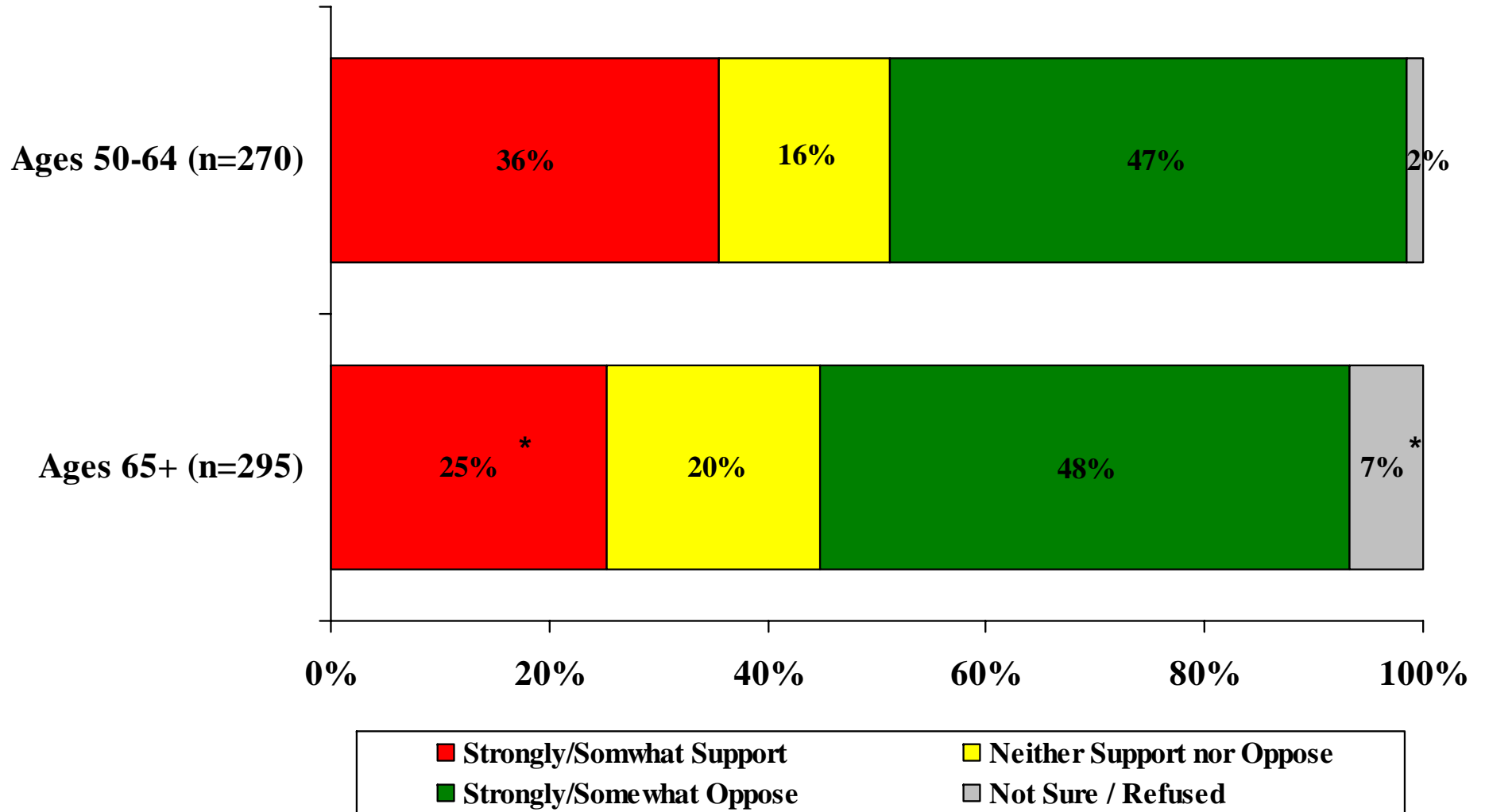
Q8f2. I'd like you to please tell me whether you find [this] an extremely convincing argument, very convincing, somewhat convincing, not very convincing, or whether this particular argument is not at all convincing:

Opponents of the SOS Citizen Initiative-97 Proposal say that it would result in cuts in services because the inflation costs of government services is much greater than the SOS formula and SOS will not allow Montana to meet the needs of its rapidly growing senior population. In addition, the state will not be able to match federal funds. Local governments will be faced with raising taxes or cutting services due to a decrease in state funds.



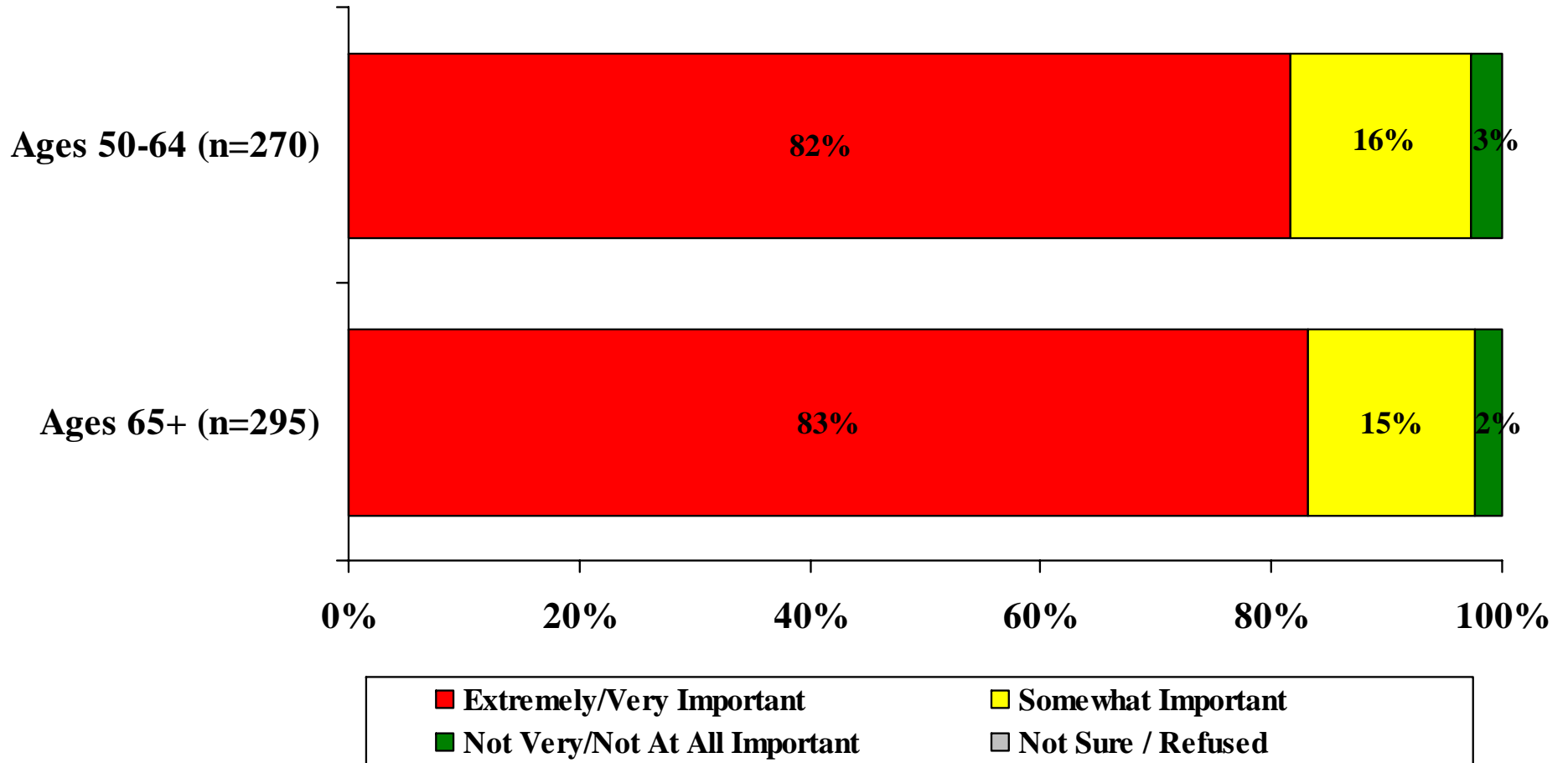
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q9. Having heard arguments both for and against the SOS Citizen Initiative-97 Proposal, now how strongly do you support or oppose SOS Citizen's Initiative-97 Proposal in Montana?



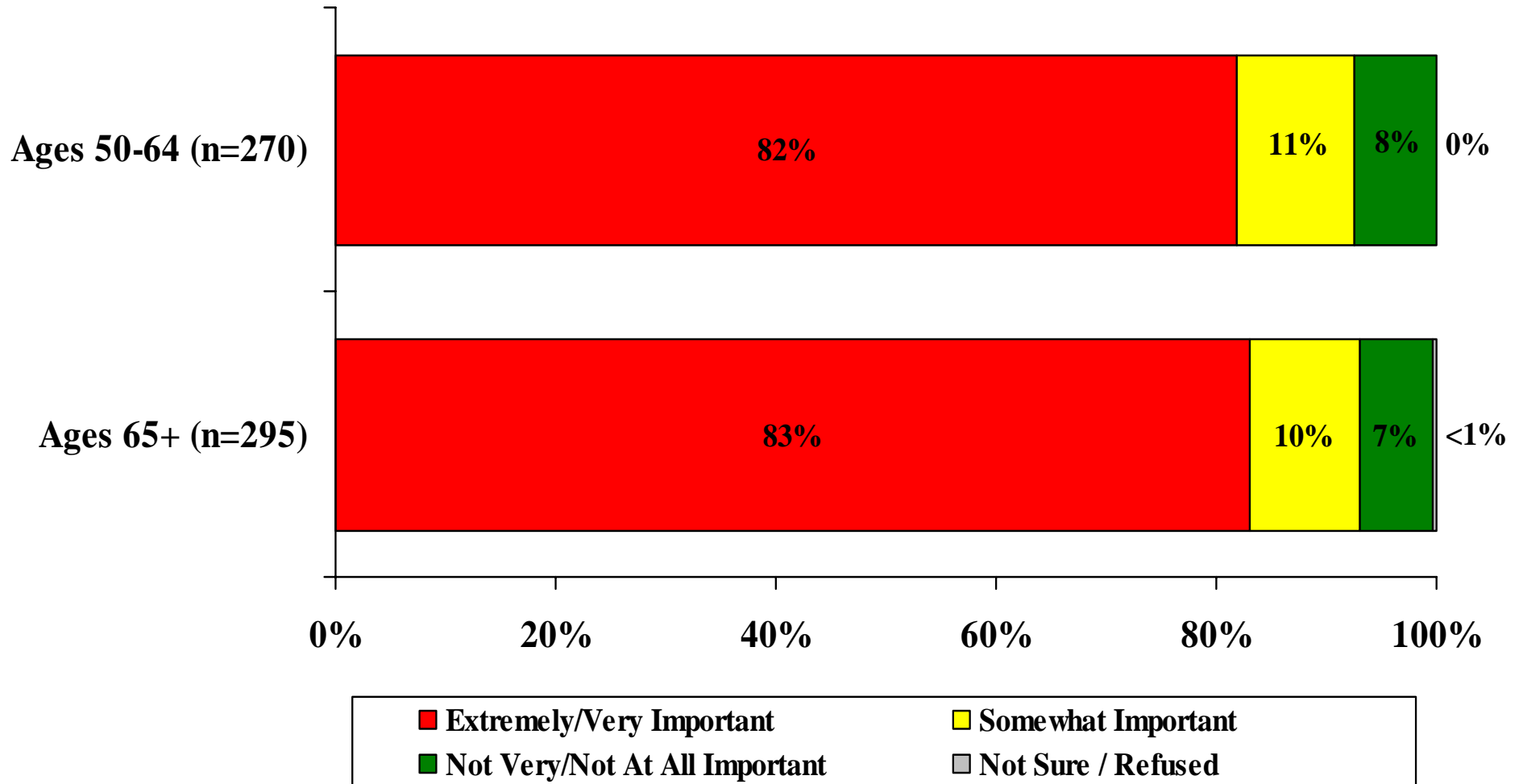
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q10b. Now, I am going to ask you about state and local services Montana provides. How important is police protection and public safety to you? Is it extremely important, very important, somewhat important, not very important or not at all important?



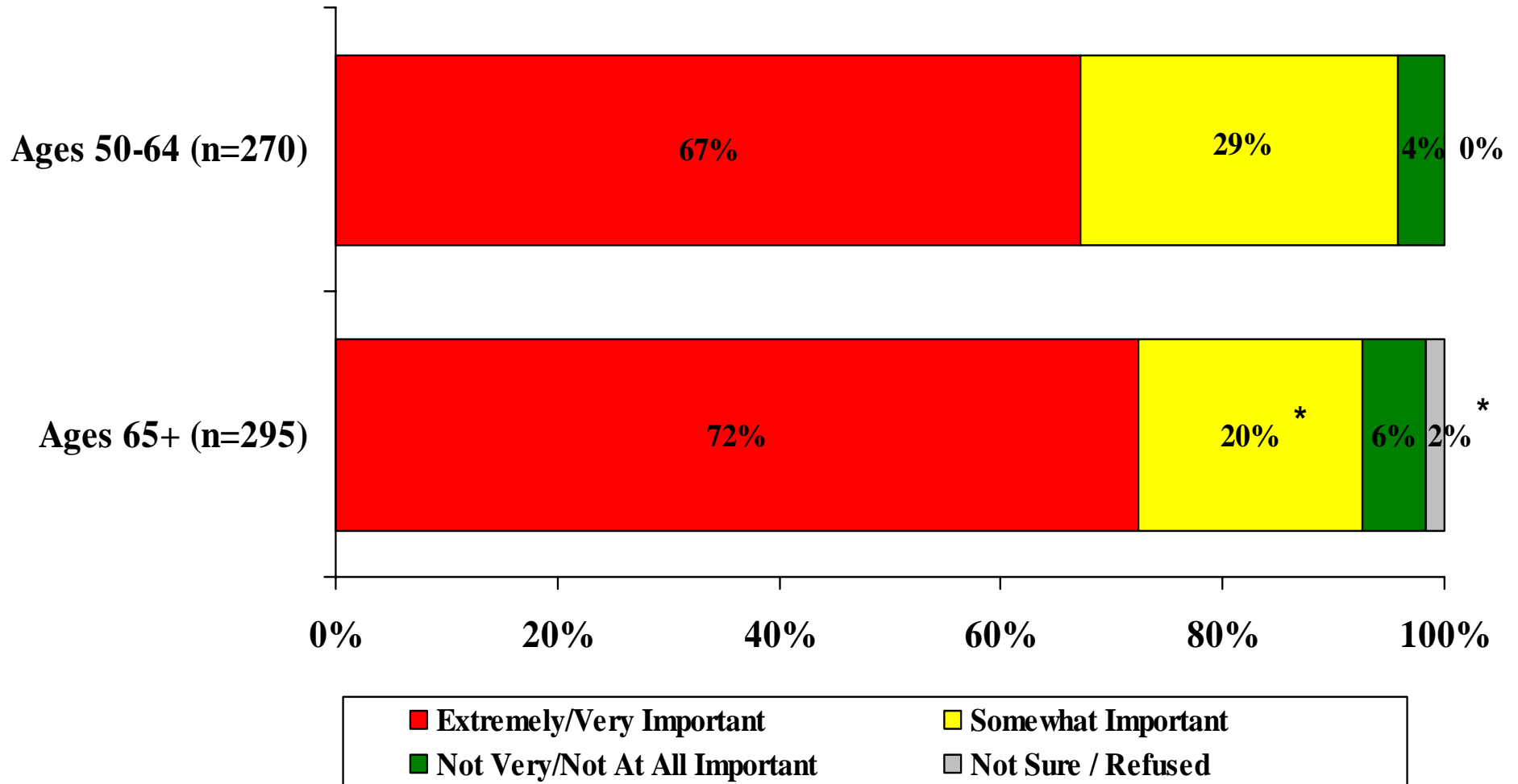
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q10e. Now, I am going to ask you about state and local services Montana provides. How important is K-12 public school education to you? Is it extremely important, very important, somewhat important, not very important or not at all important?



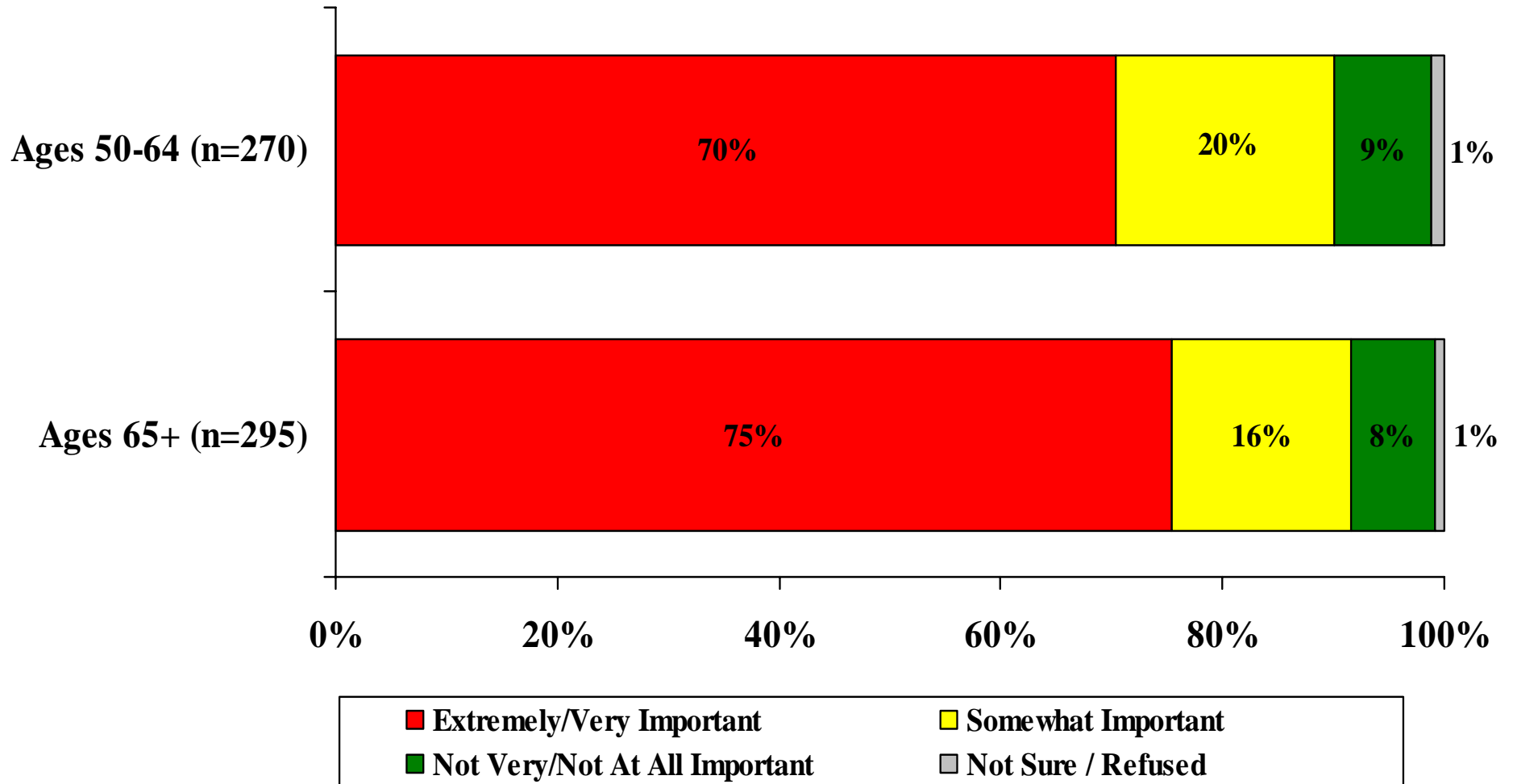
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q10f. Now, I am going to ask you about state and local services Montana provides. How important is healthcare for low income families and their children to you? Is it extremely important, very important, somewhat important, not very important or not at all important?



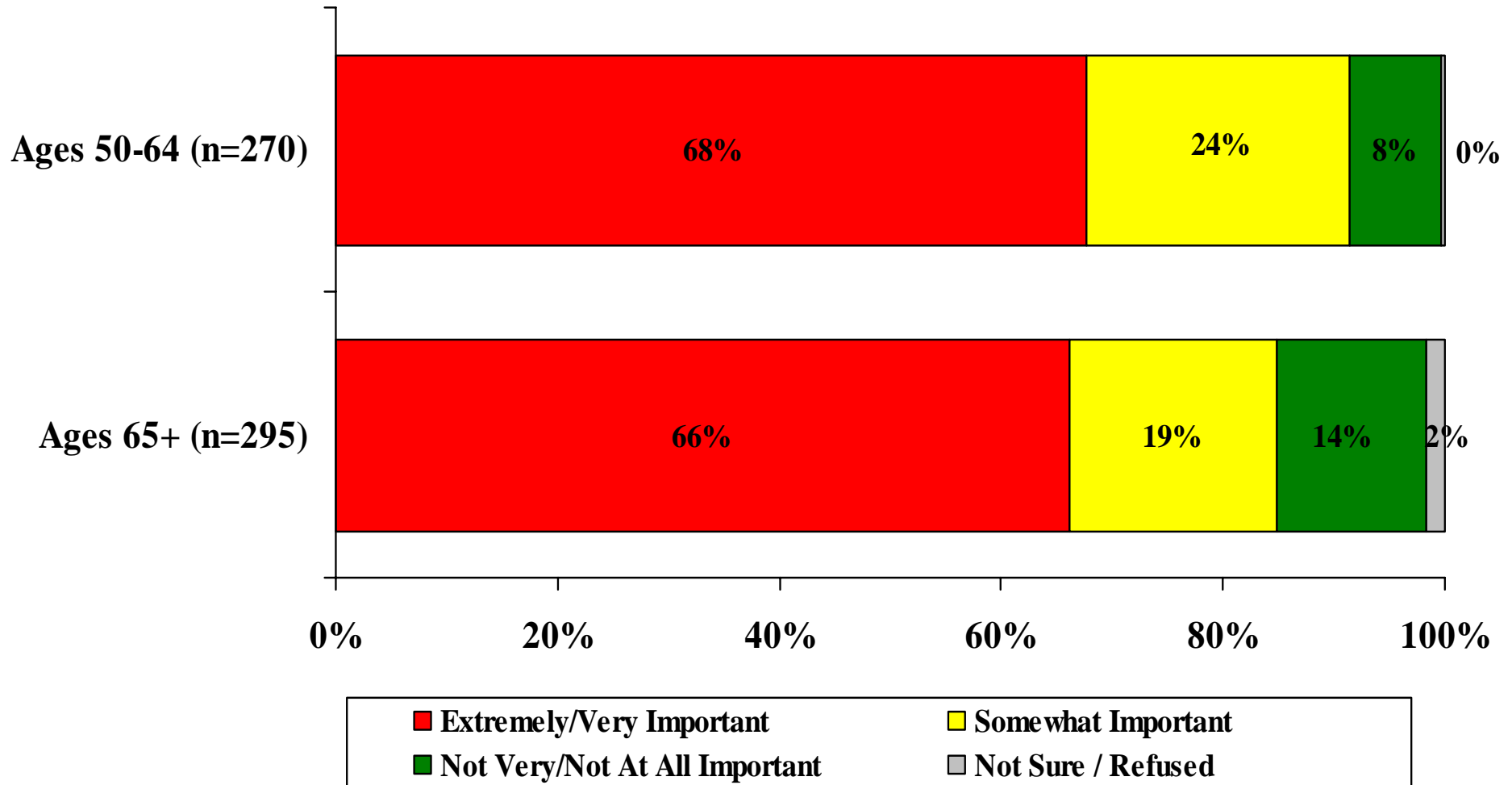
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q10g. Now, I am going to ask you about state and local services Montana provides. How important is higher education (Universities, Colleges, & Technical Colleges) to you? Is it extremely important, very important, somewhat important, not very important or not at all important?



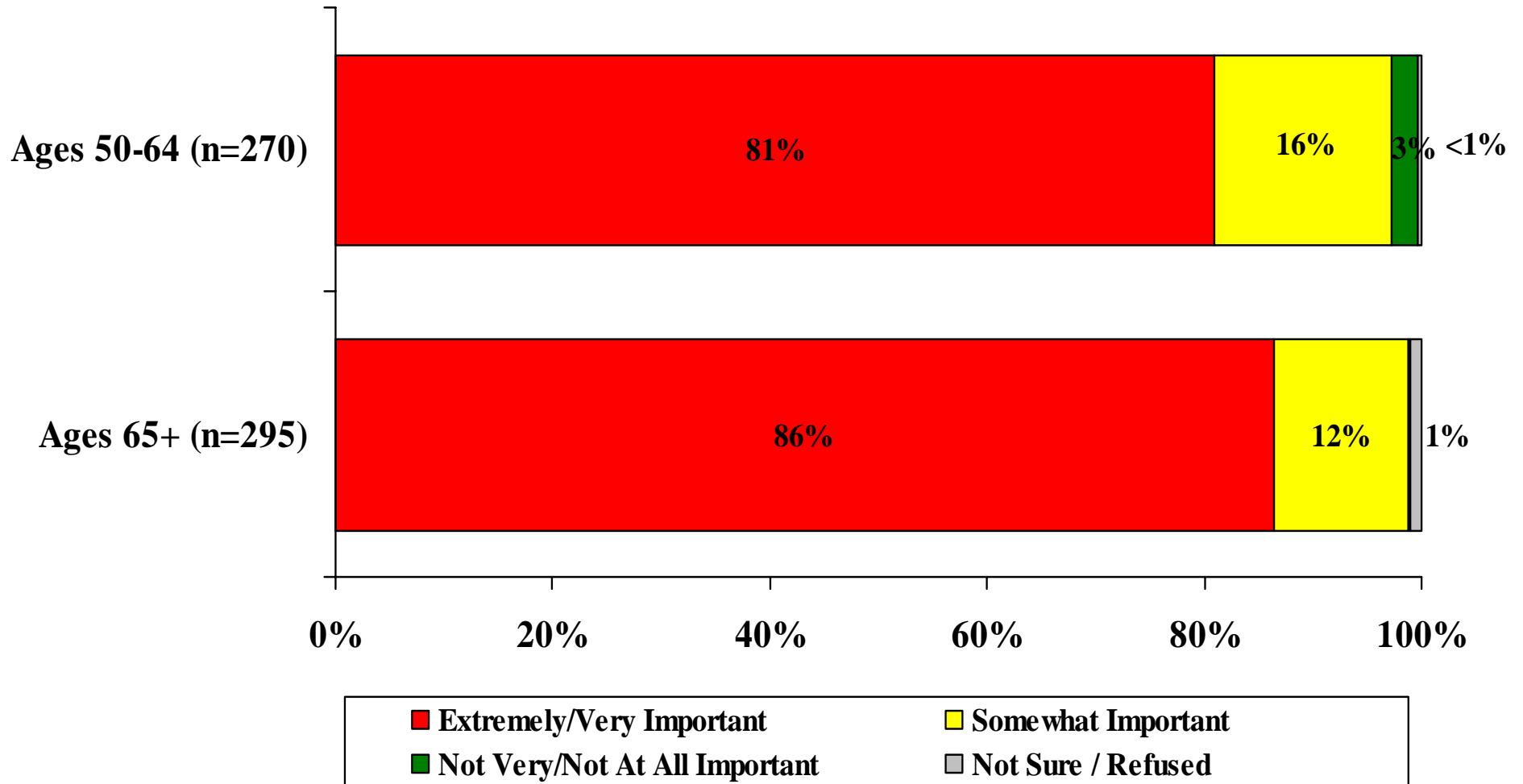
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q10i. Now, I am going to ask you about state and local services Montana provides. How important are senior state services including home delivered meals, low-income energy assistance, & senior transportation to you? Are they extremely important, very important, somewhat important, not very important or not at all important?



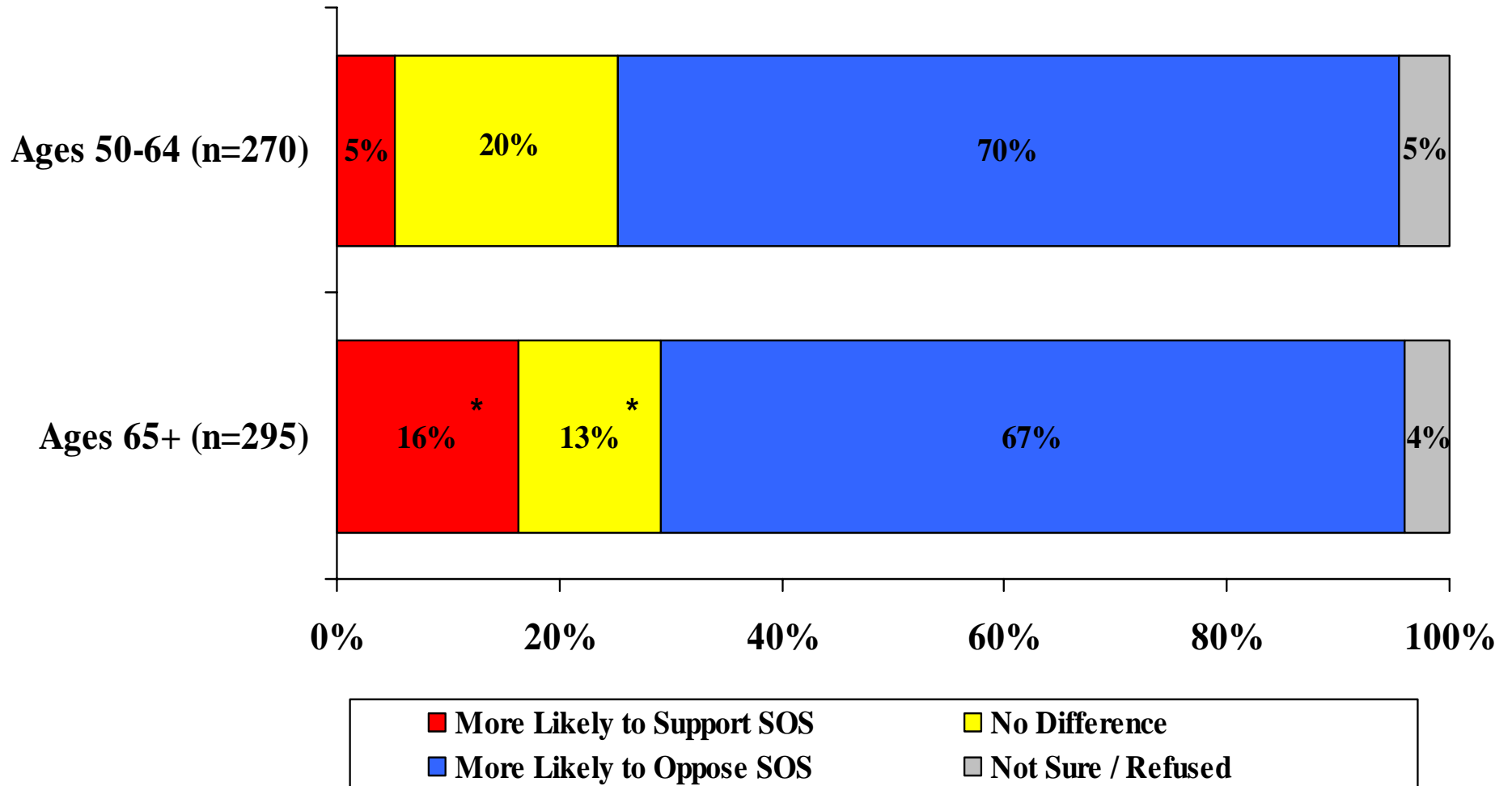
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q10I. Now, I am going to ask you about state and local services Montana provides. How important is healthcare for people in nursing homes including seniors and those with disabilities to you? Is it extremely important, very important, somewhat important, not very important or not at all important?



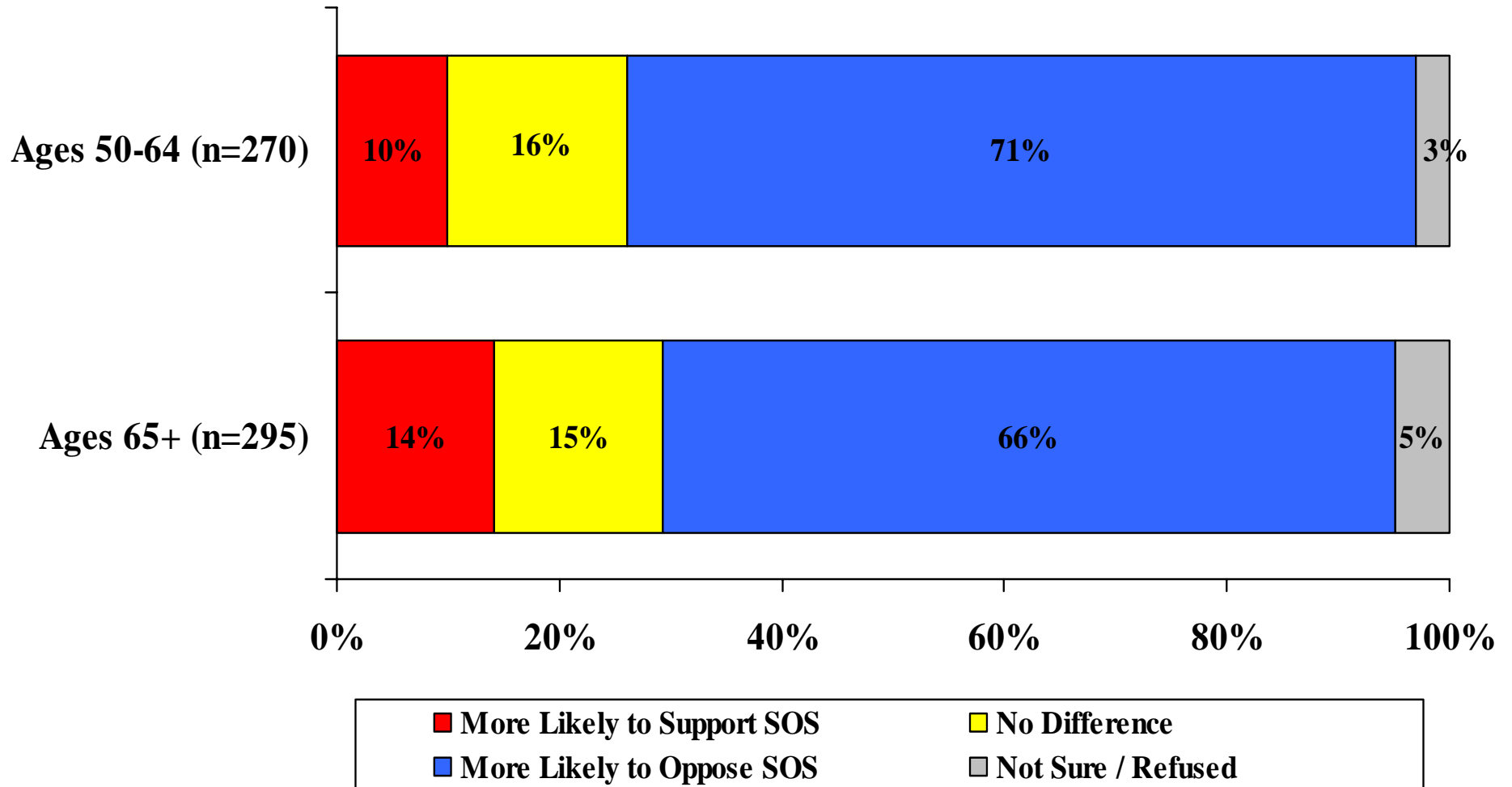
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q11b. If SOS Citizen Initiative-97 Proposal cut state funding for police protection and public safety, would you be more likely to support the SOS Citizen Initiative-97 Proposal, more likely to oppose the proposal, or would it not make a difference?



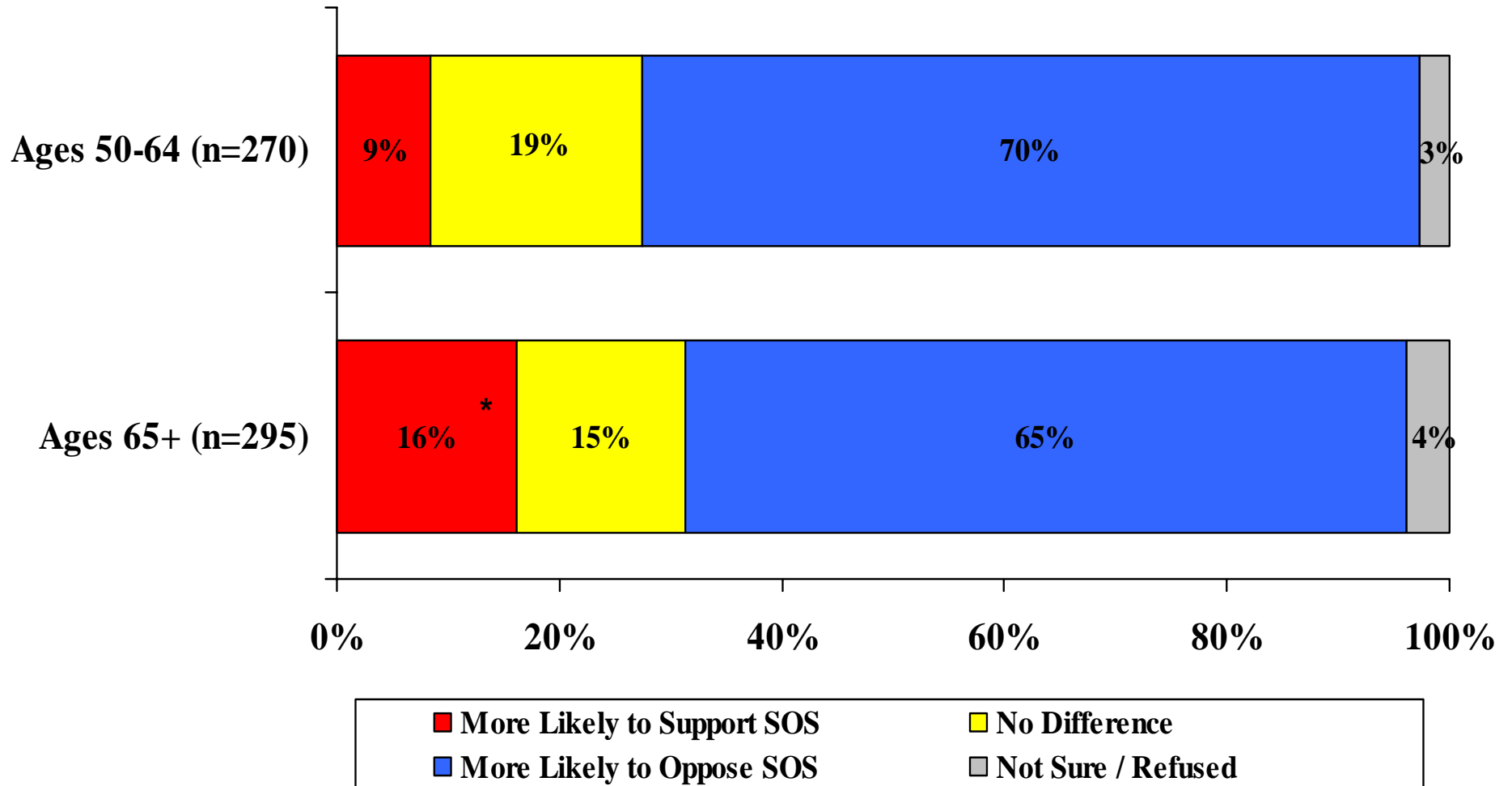
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q11e. If SOS Citizen Initiative-97 Proposal cut state funding for K-12 public school education, would you be more likely to support the SOS Citizen Initiative-97 Proposal, more likely to oppose the proposal, or would it not make a difference?



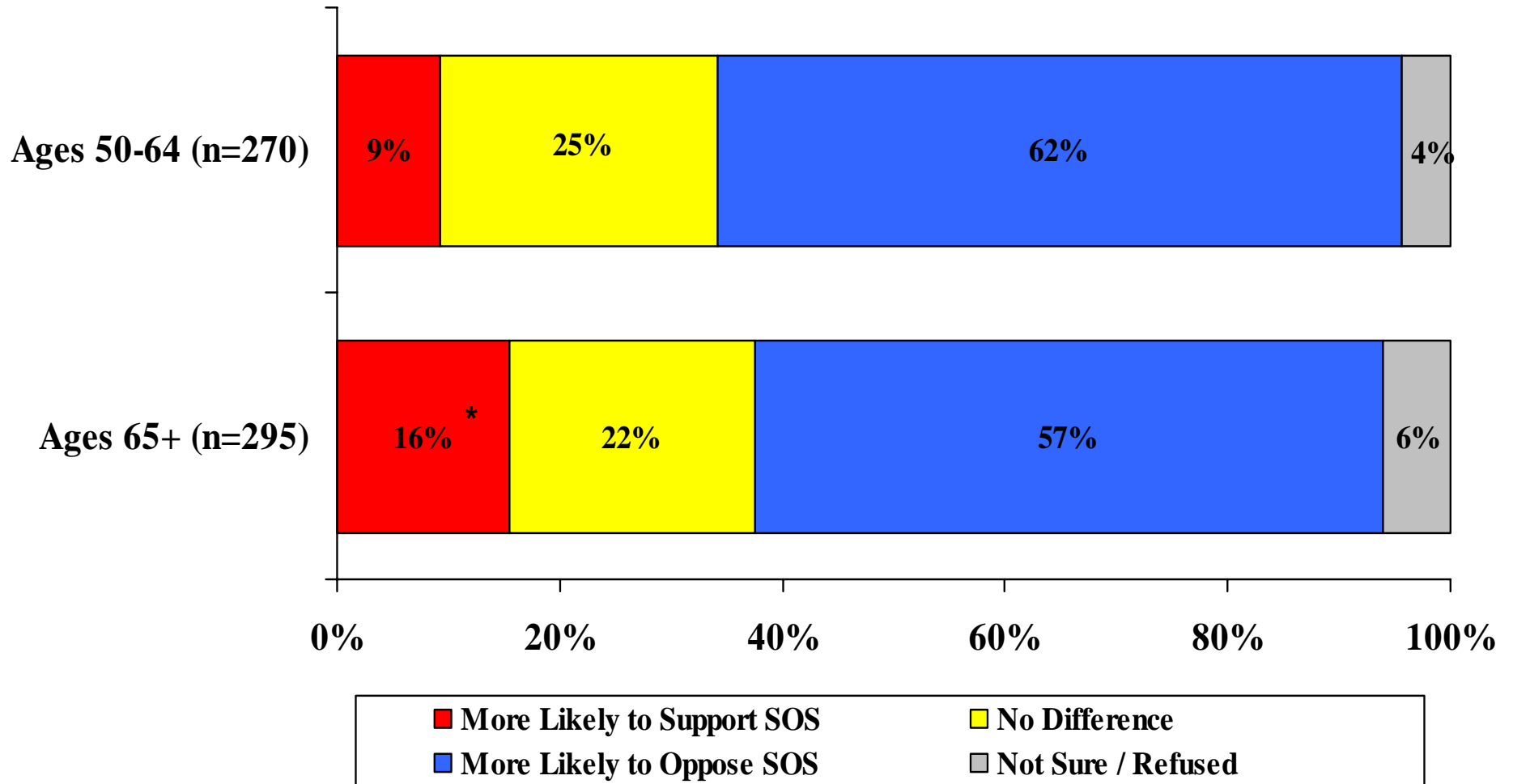
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q11f. If SOS Citizen Initiative-97 Proposal cut state funding for healthcare for low income families and their children, would you be more likely to support the SOS Citizen Initiative-97 Proposal, more likely to oppose the proposal, or would it not make a difference?



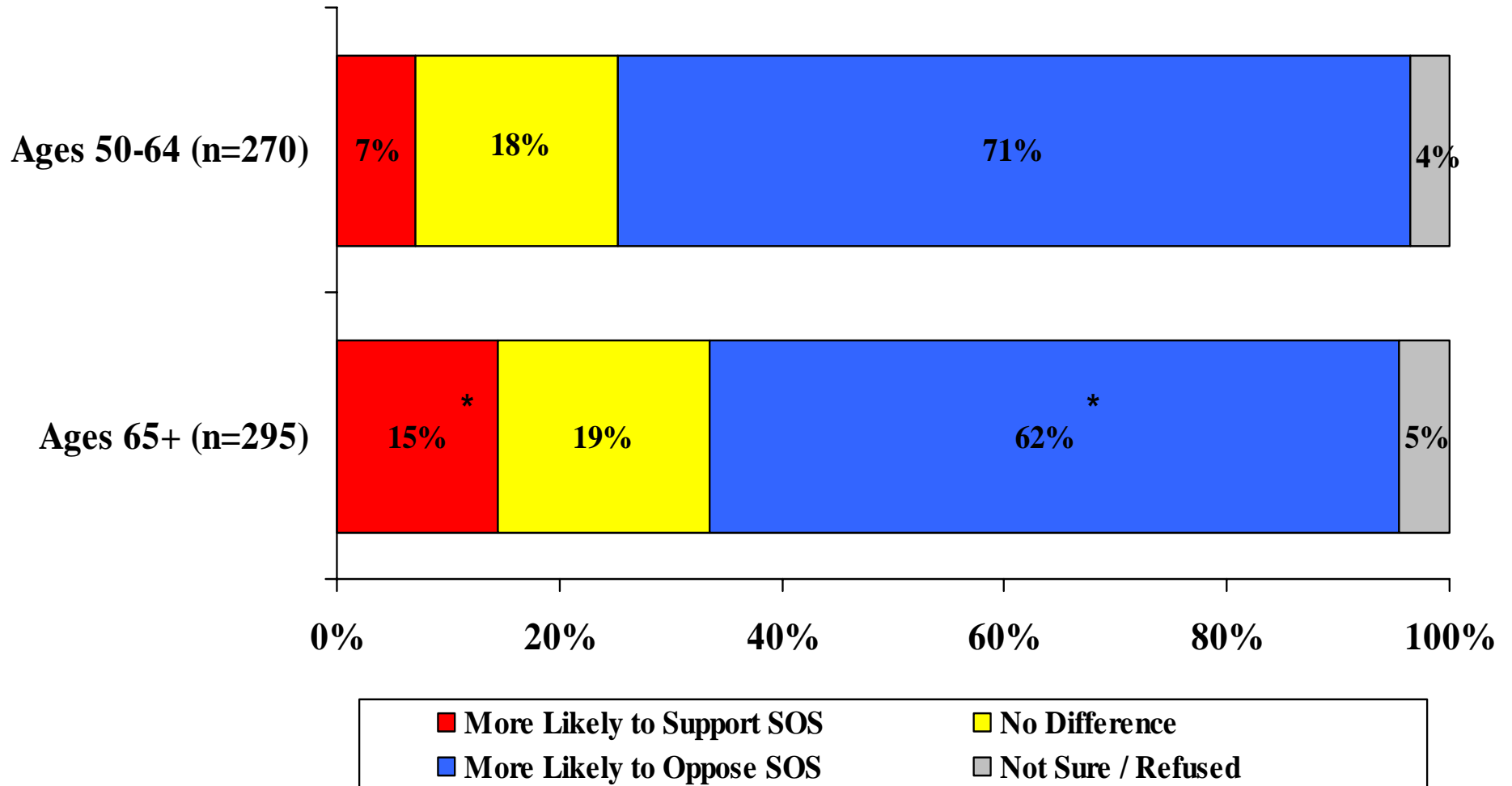
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q11g. If SOS Citizen Initiative-97 Proposal cut state funding for higher education (Universities, Colleges, & Technical Colleges), would you be more likely to support the SOS Citizen Initiative-97 Proposal, more likely to oppose the proposal, or would it not make a difference?



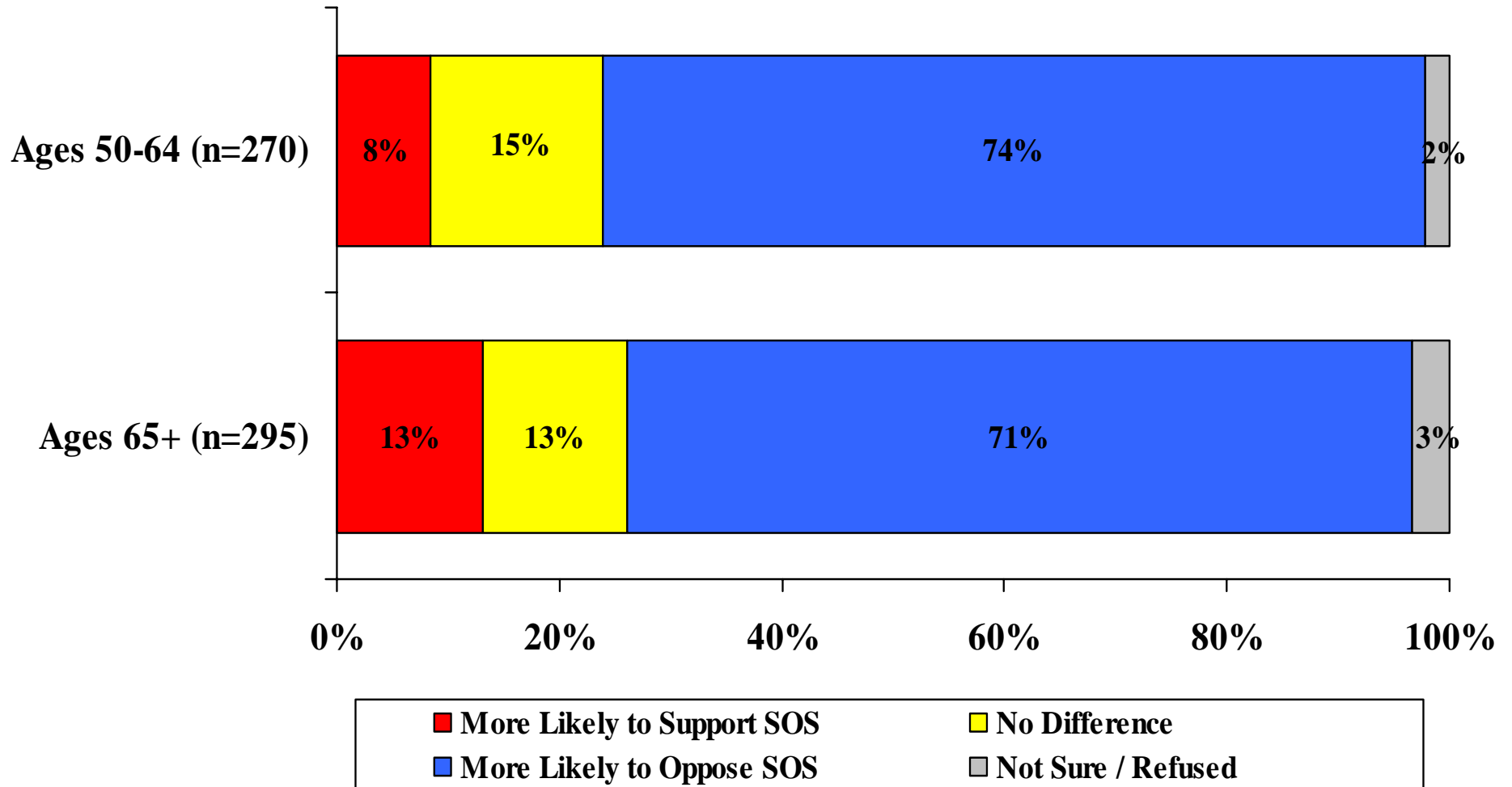
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q11i. If SOS Citizen Initiative-97 Proposal cut state funding for senior state services including home delivered meals, low-income energy assistance, & senior transportation, would you be more likely to support the SOS Citizen Initiative-97 Proposal, more likely to oppose the proposal, or would it not make a difference?



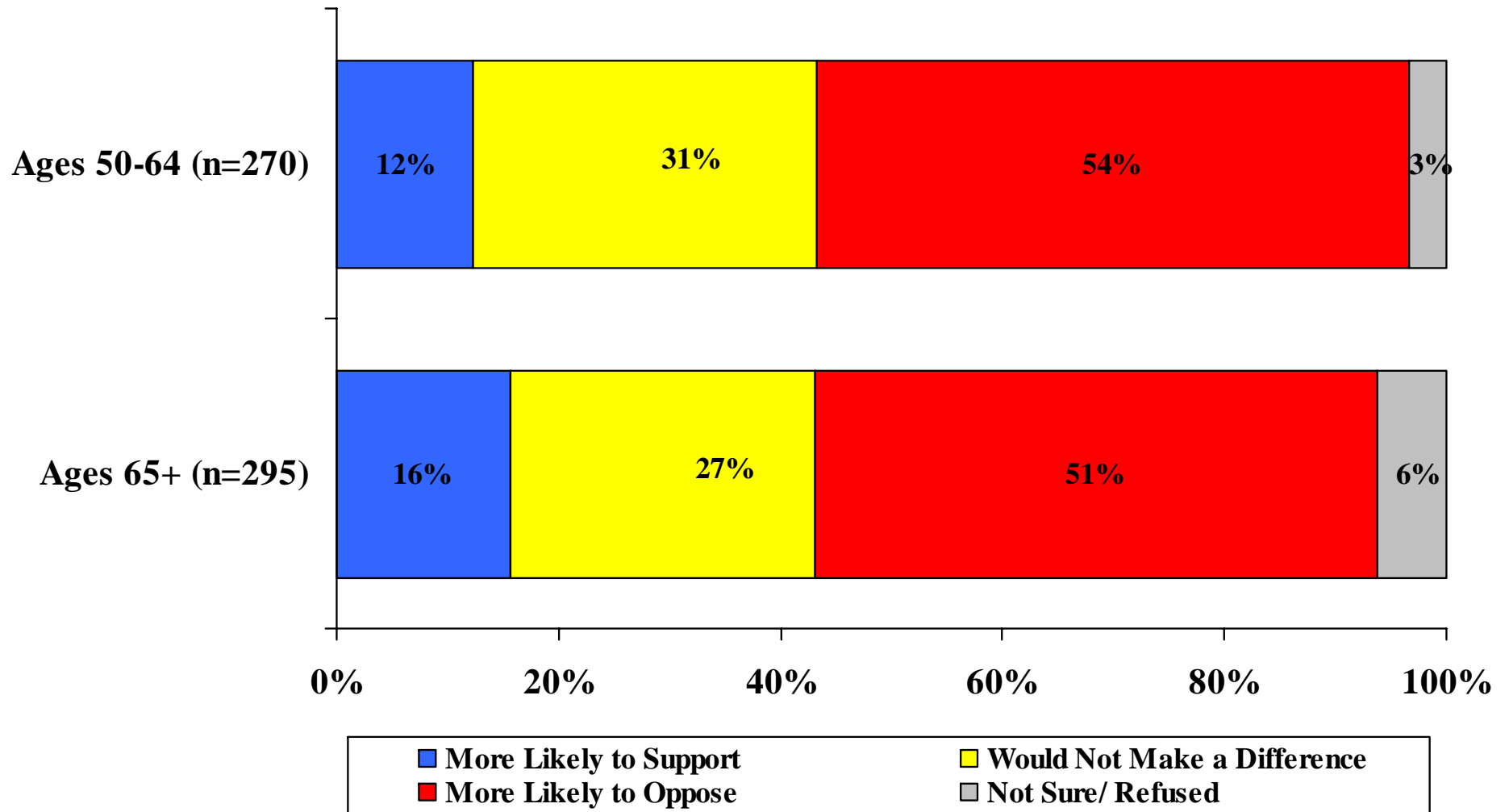
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q111. If SOS Citizen Initiative-97 Proposal cut state funding for healthcare for people in nursing homes including seniors and those with disabilities, would you be more likely to support the SOS Citizen Initiative-97 Proposal, more likely to oppose the proposal, or would it not make a difference?



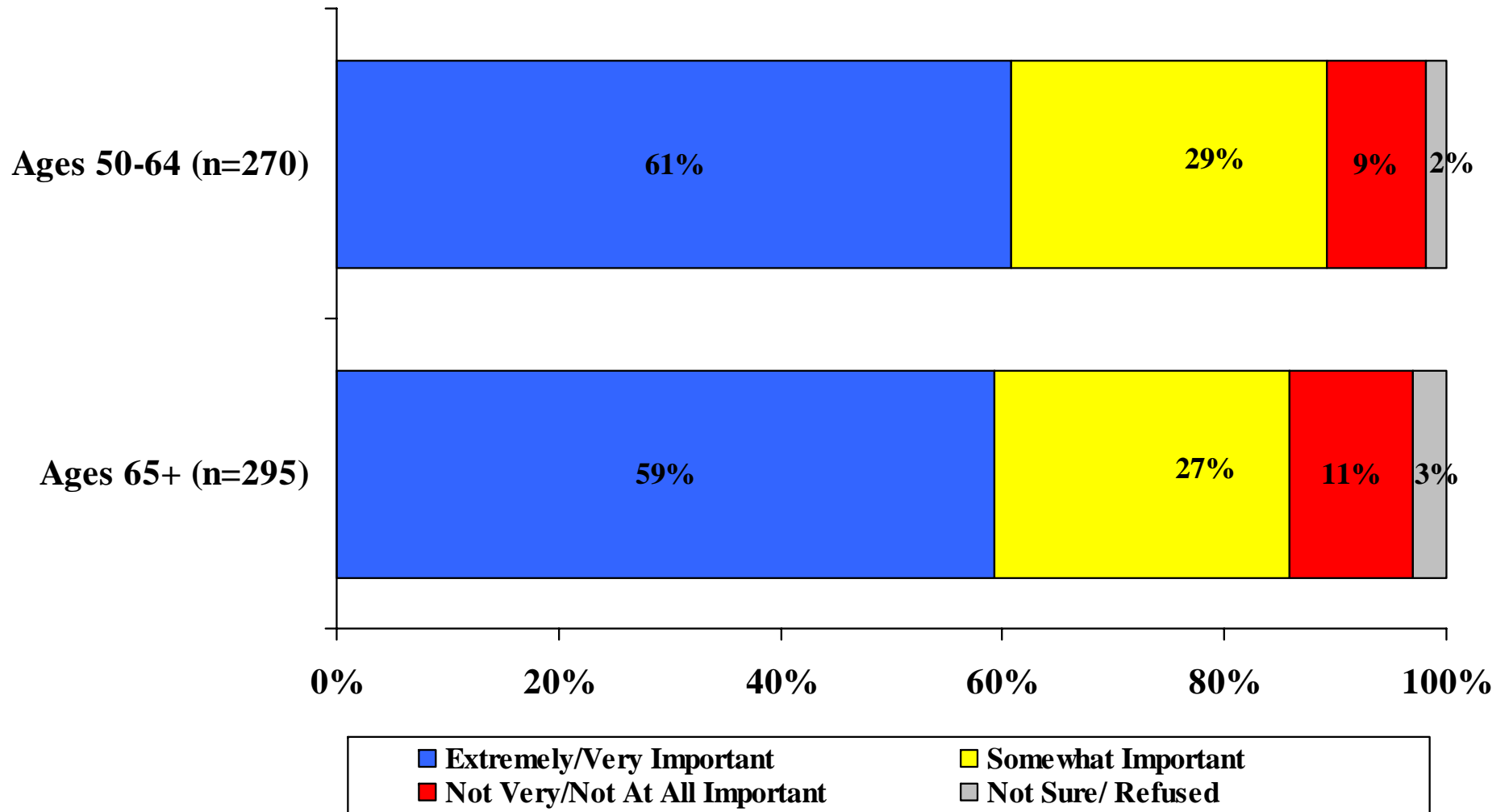
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q12. Suppose you learned that AARP and other senior organizations OPPOSED the SOS Citizen Initiative-97 Proposal because they believe it would lead to significant cuts in important state services for Montana seniors. Would you be more likely to support SOS Citizen Initiative-97 Proposal, more likely to oppose, or would it not make a difference in how you voted for the proposal?



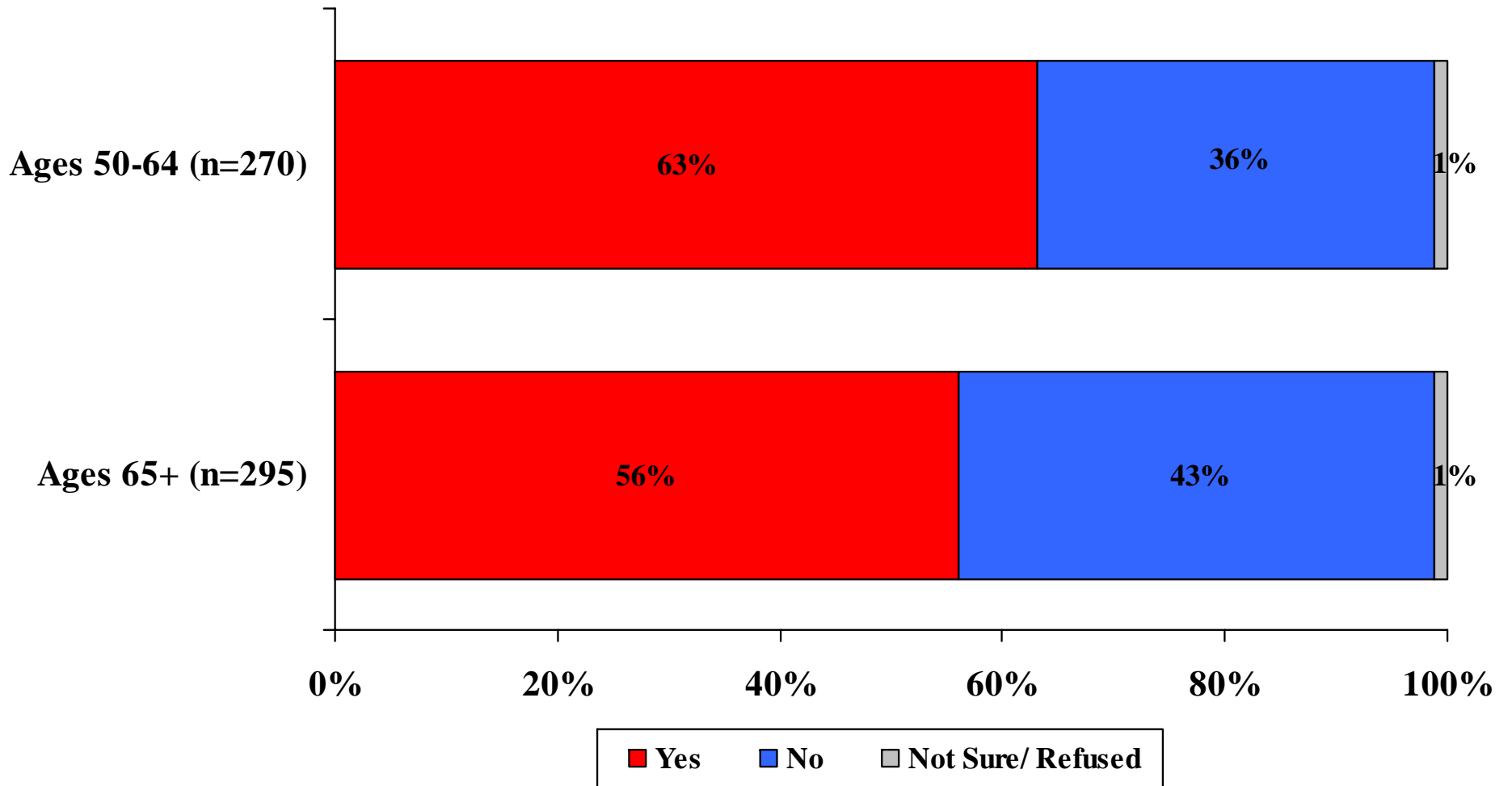
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q17. How important is it to you that the State of Montana has a balanced budget amendment in the constitution saying Montana's Annual spending budget shall not exceed its anticipated revenues? Would you say it is extremely important, very important, somewhat important, not very important, or not at all important?



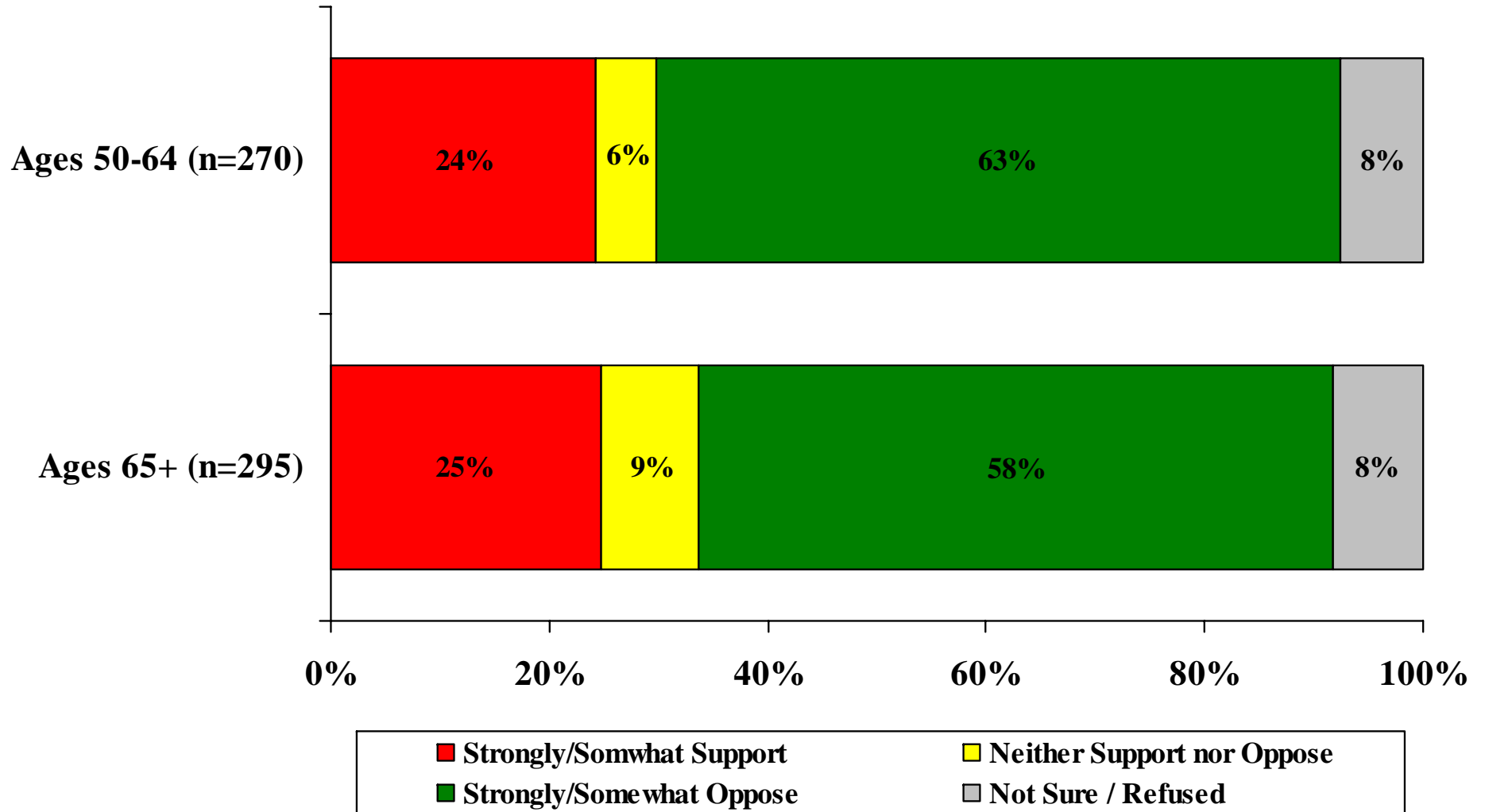
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q18. Did you know that the Montana constitution already has a provision requiring an annual balanced budget?



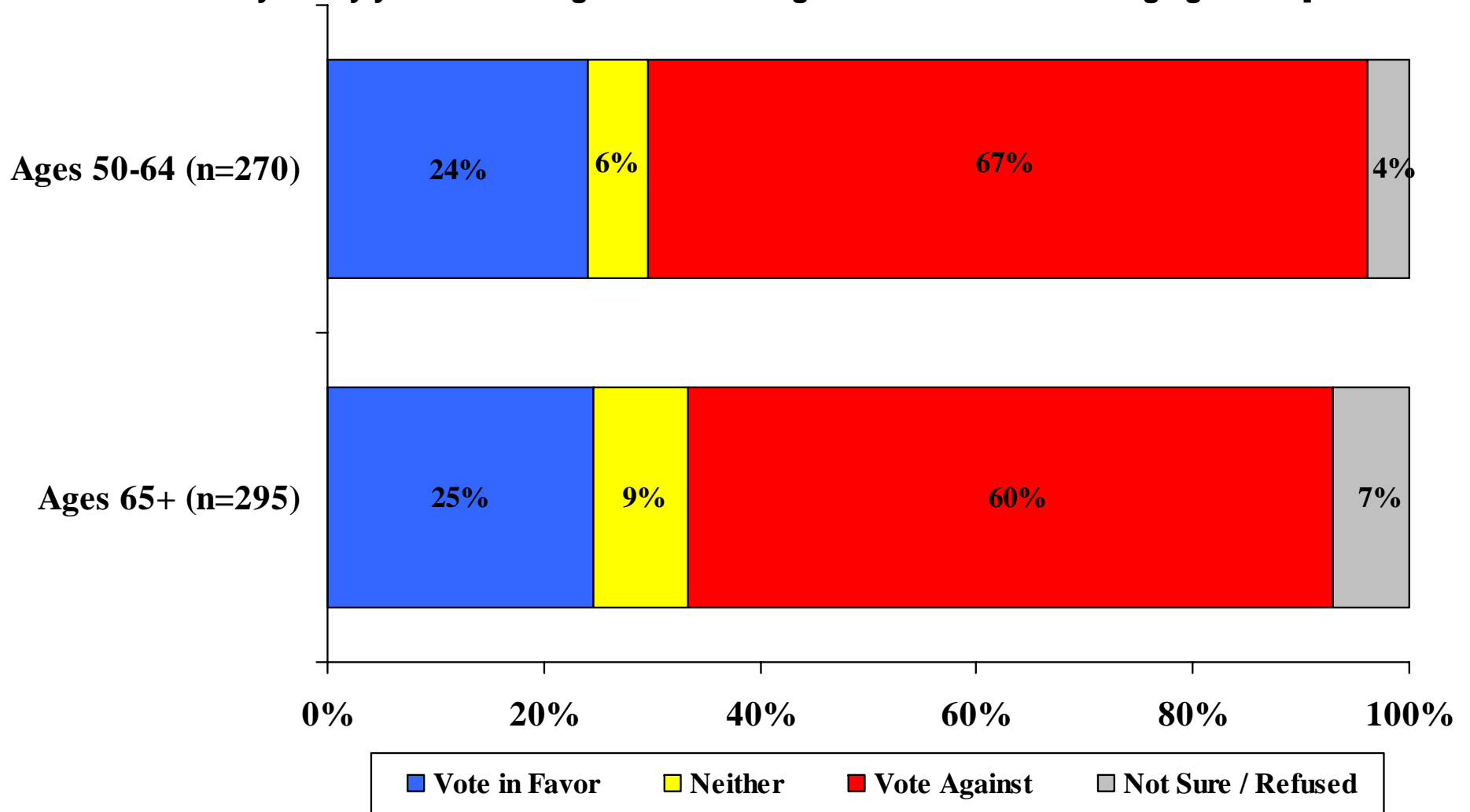
* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q19. Currently in Montana, there is an effort to pass an amendment to the constitution called Stop OverSpending (SOS). The SOS initiative would limit state spending. Given that Montana already has a balanced budget amendment to the state constitution, do you support or oppose the Stop OverSpending initiative?



* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

Q13 & Q14. Now thinking about all the information we have discussed about this proposal that may be on the ballot in November, if the election were held today, would you vote for or against this proposal? [IF INITIALLY UNDECIDED ASK: Well, if you had to decide right now, which way would you say you are leaning—toward voting in favor or toward voting against?"]

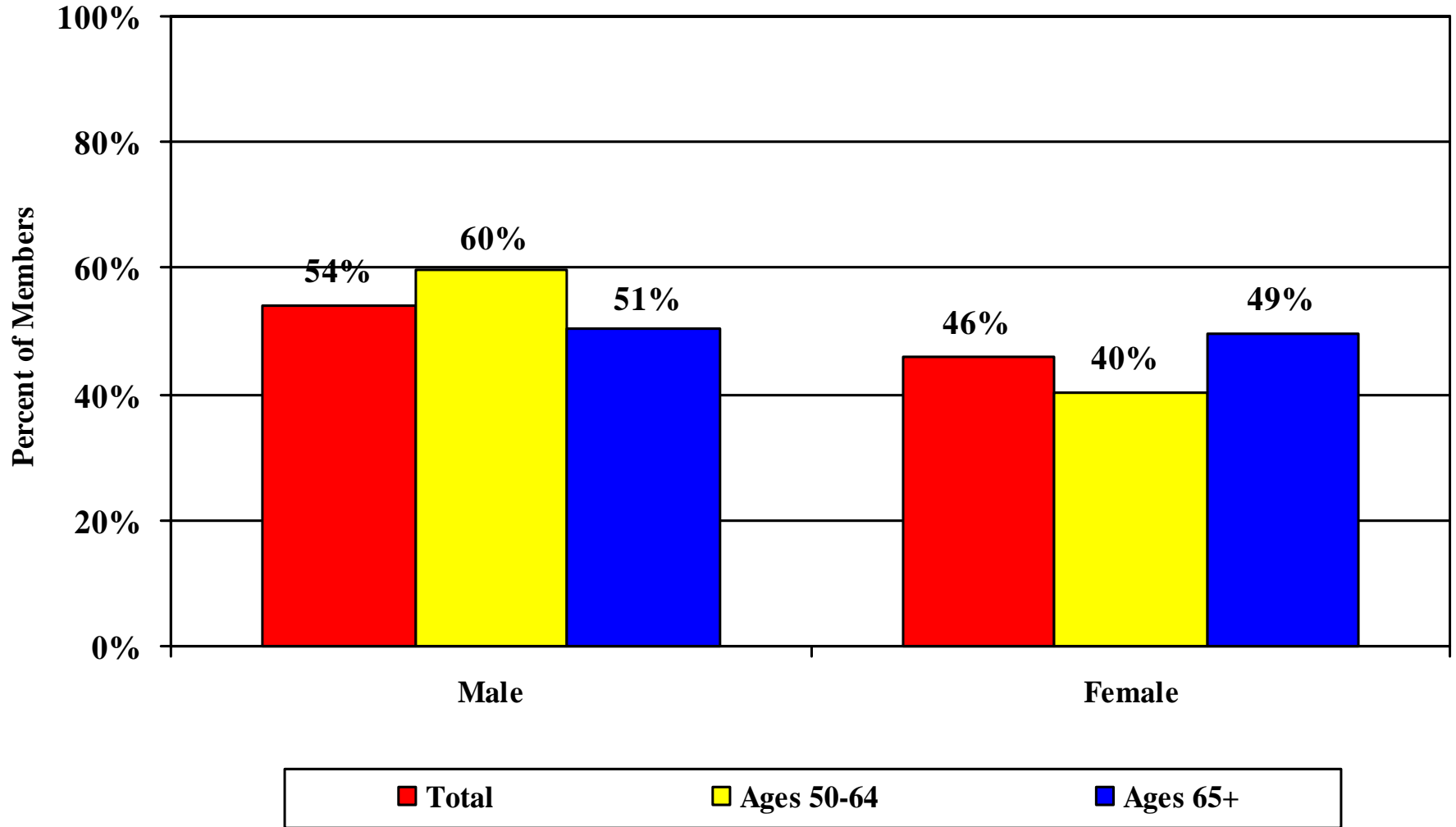


* Statistically significant difference from Members age 50 to 64 at the 95% level of confidence

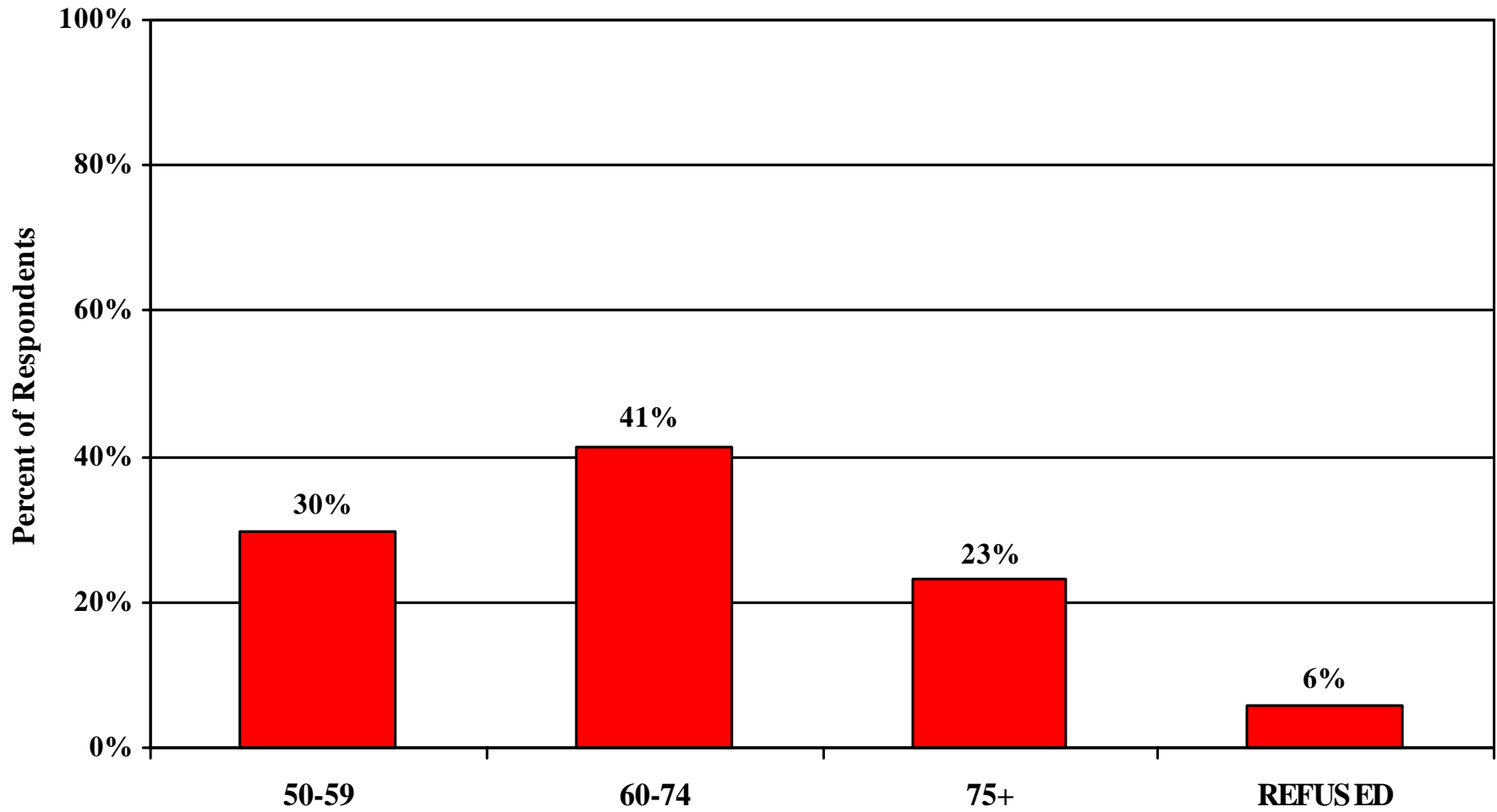
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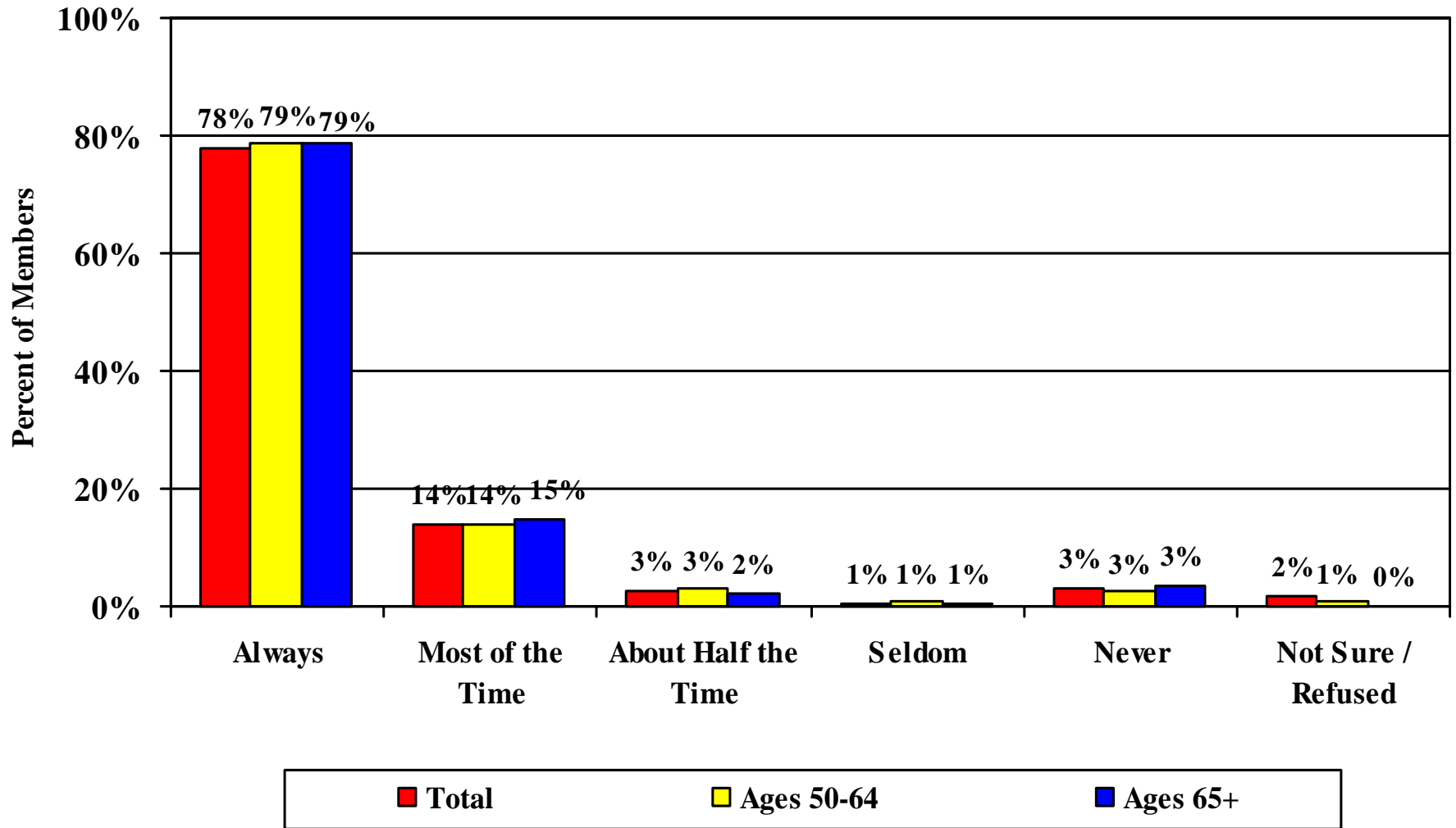
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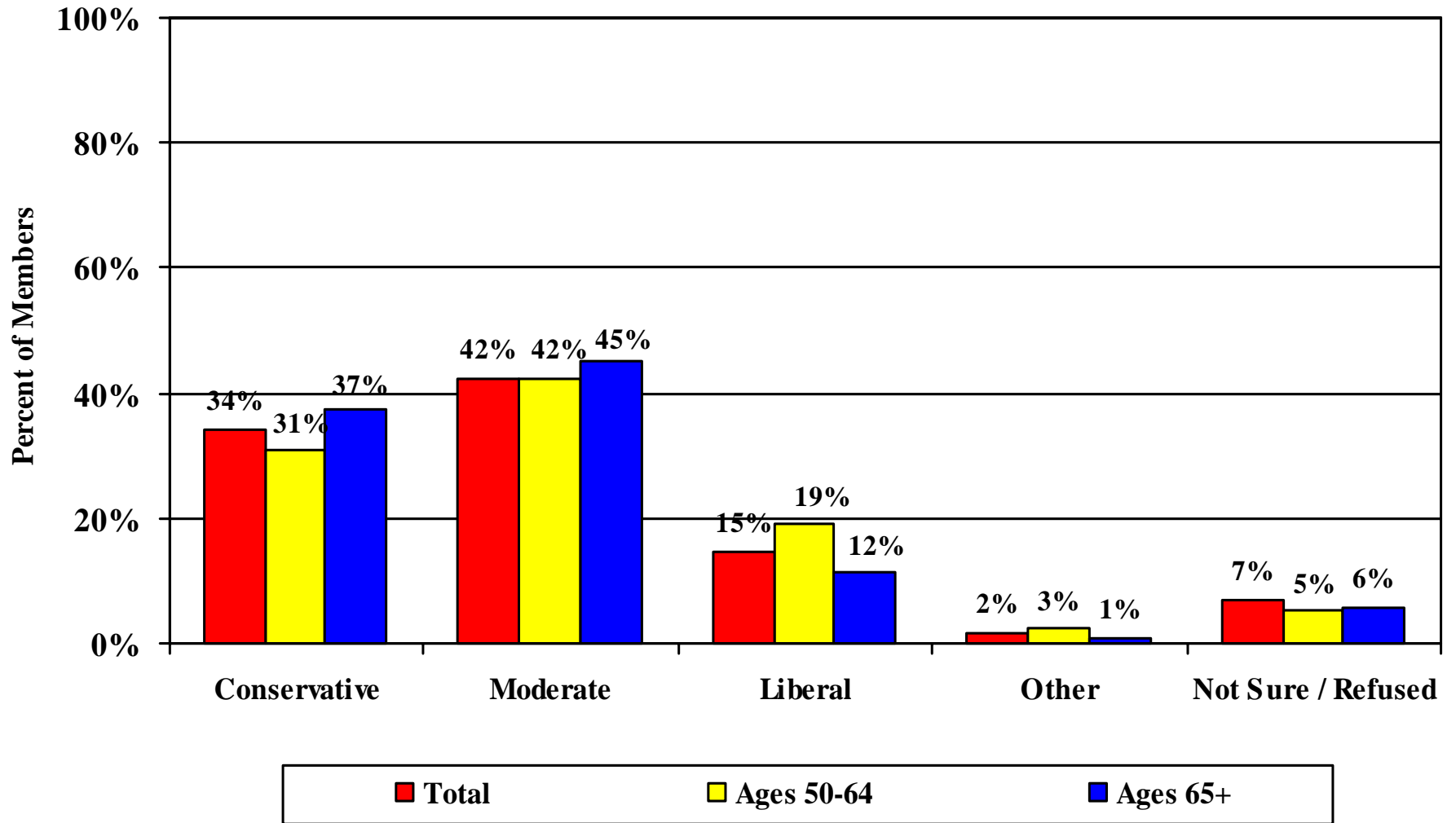
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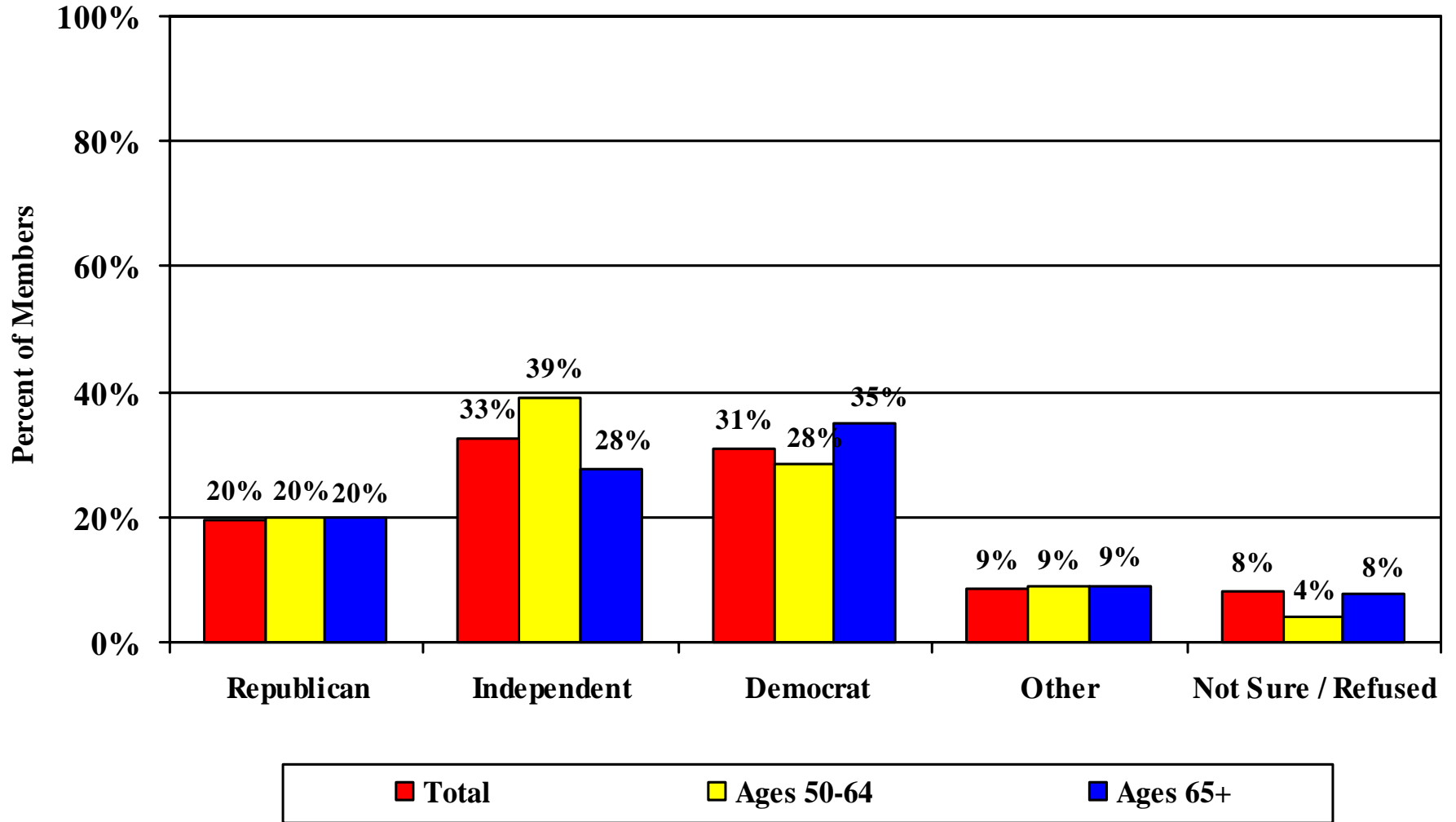
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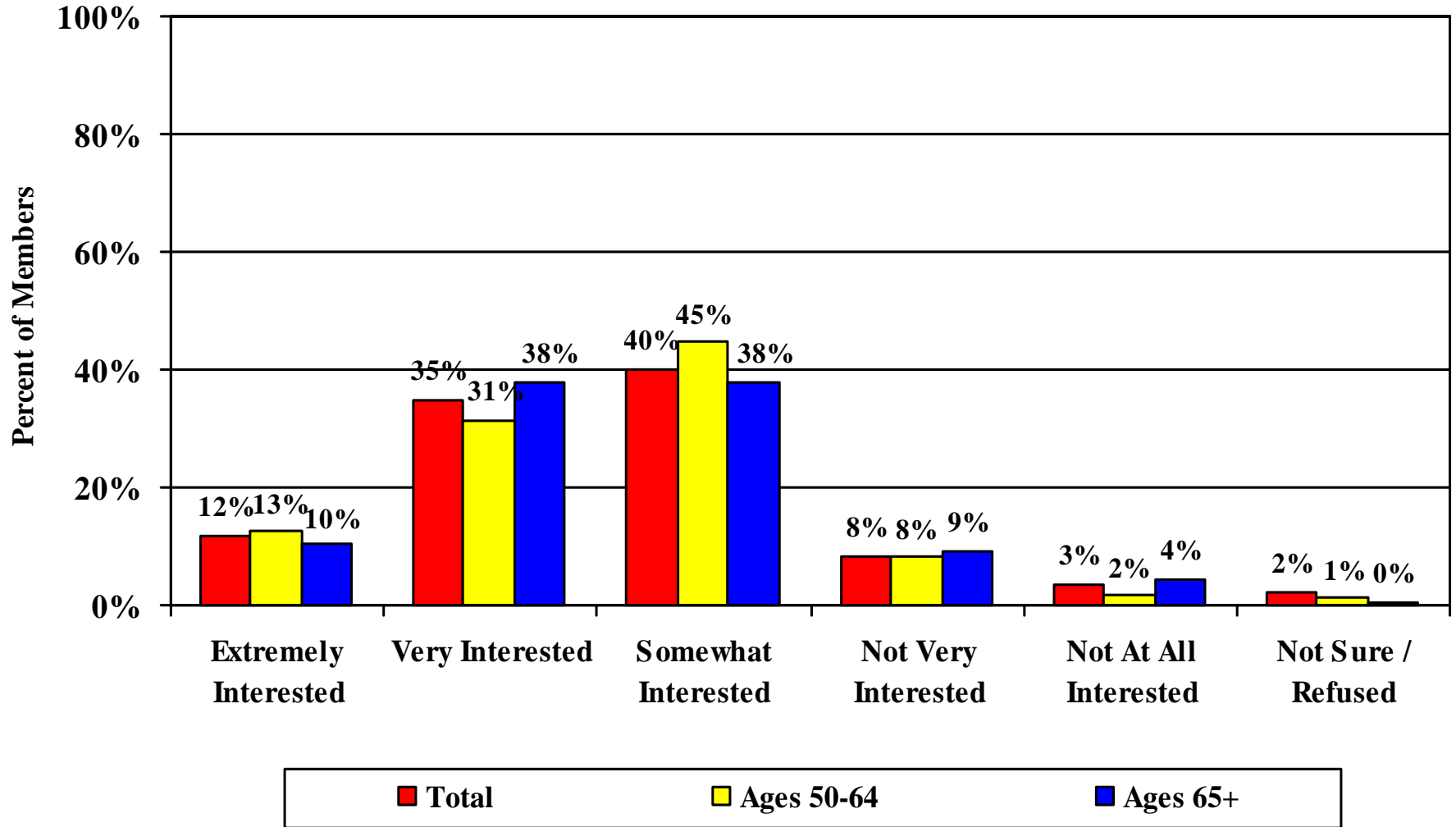
POLITICAL VIEWS



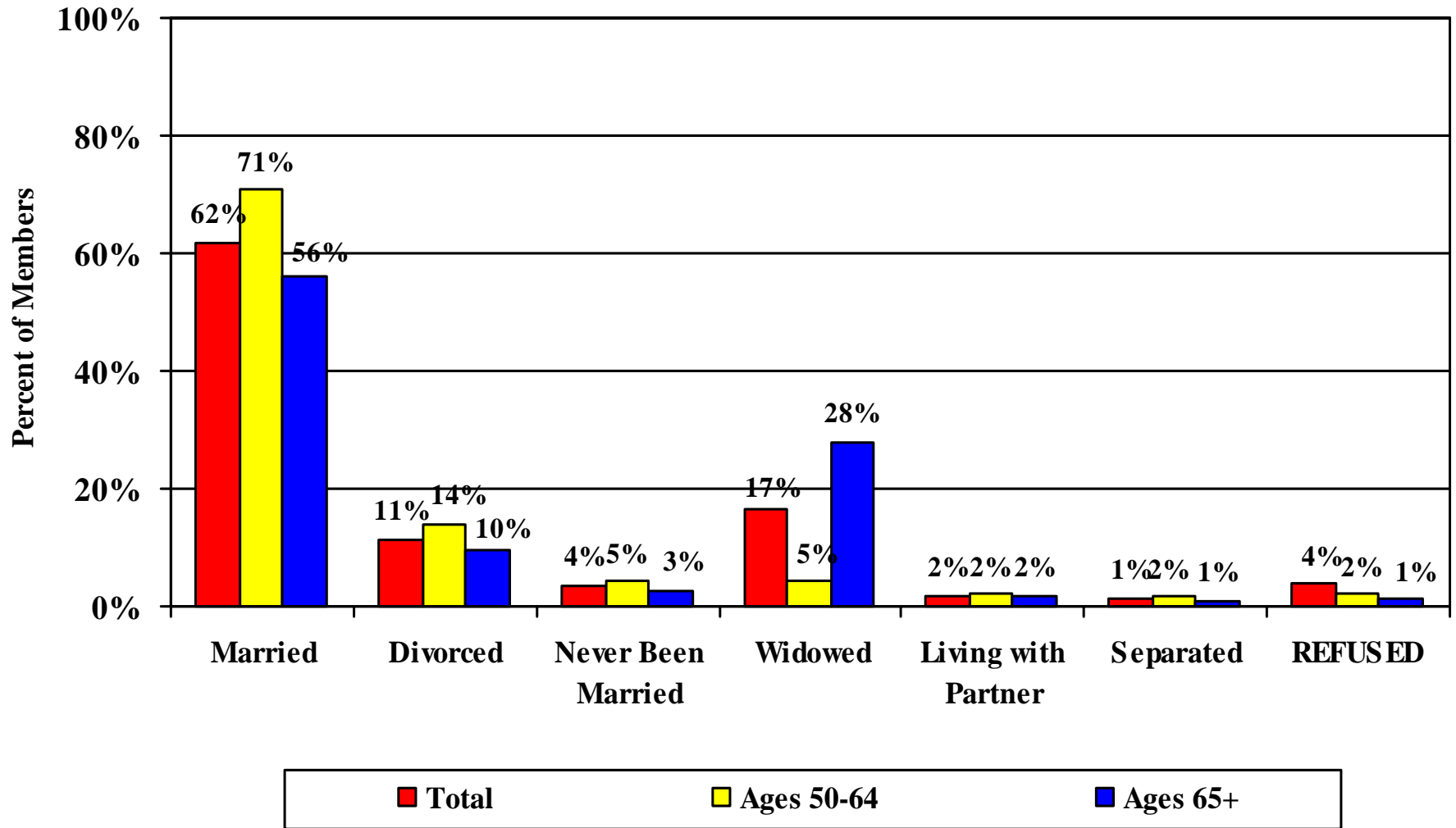
PARTY IDENTIFICATION



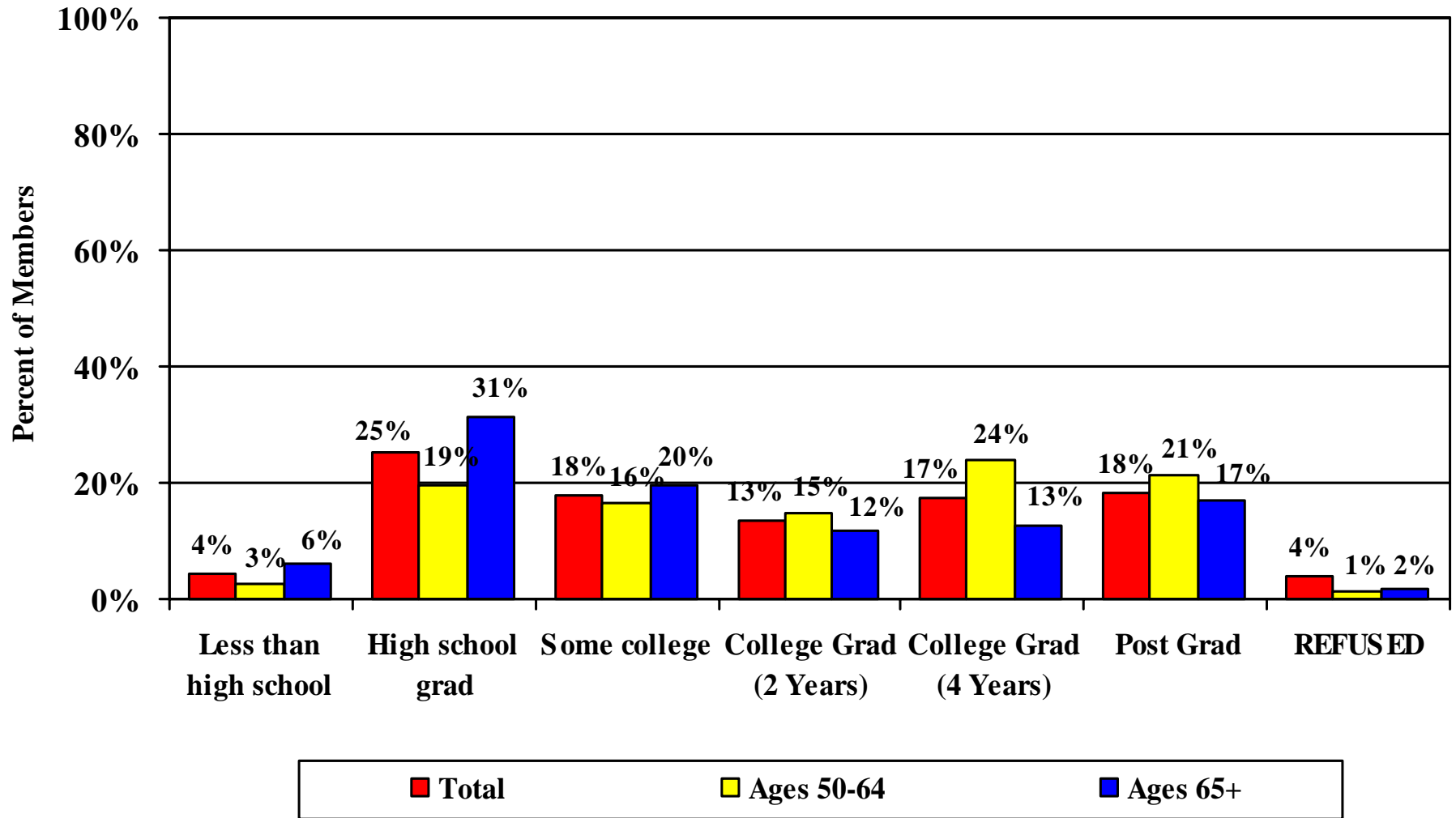
INTEREST IN MONTANA'S STATE GOVERNMENT ACTIVITIES



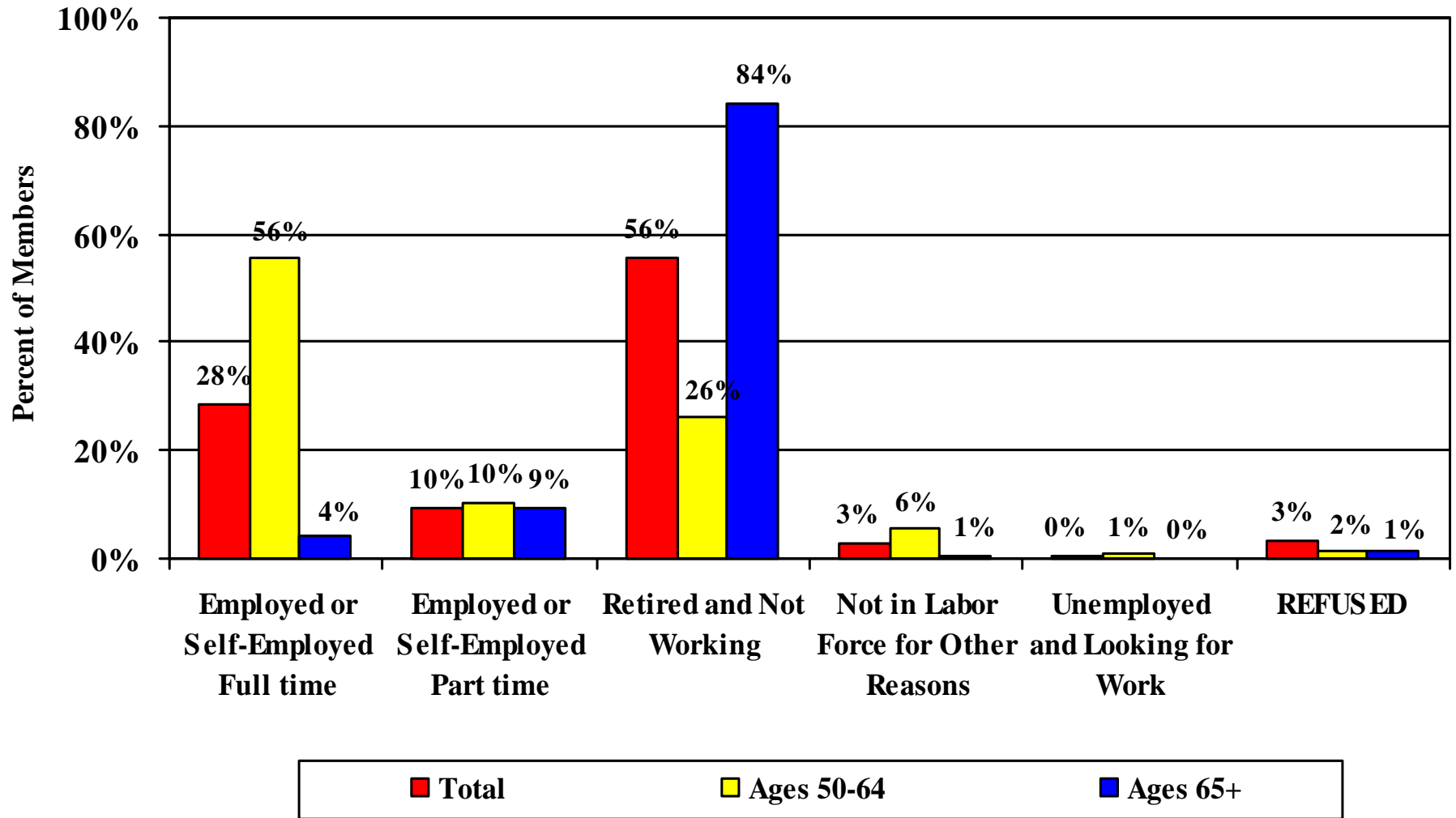
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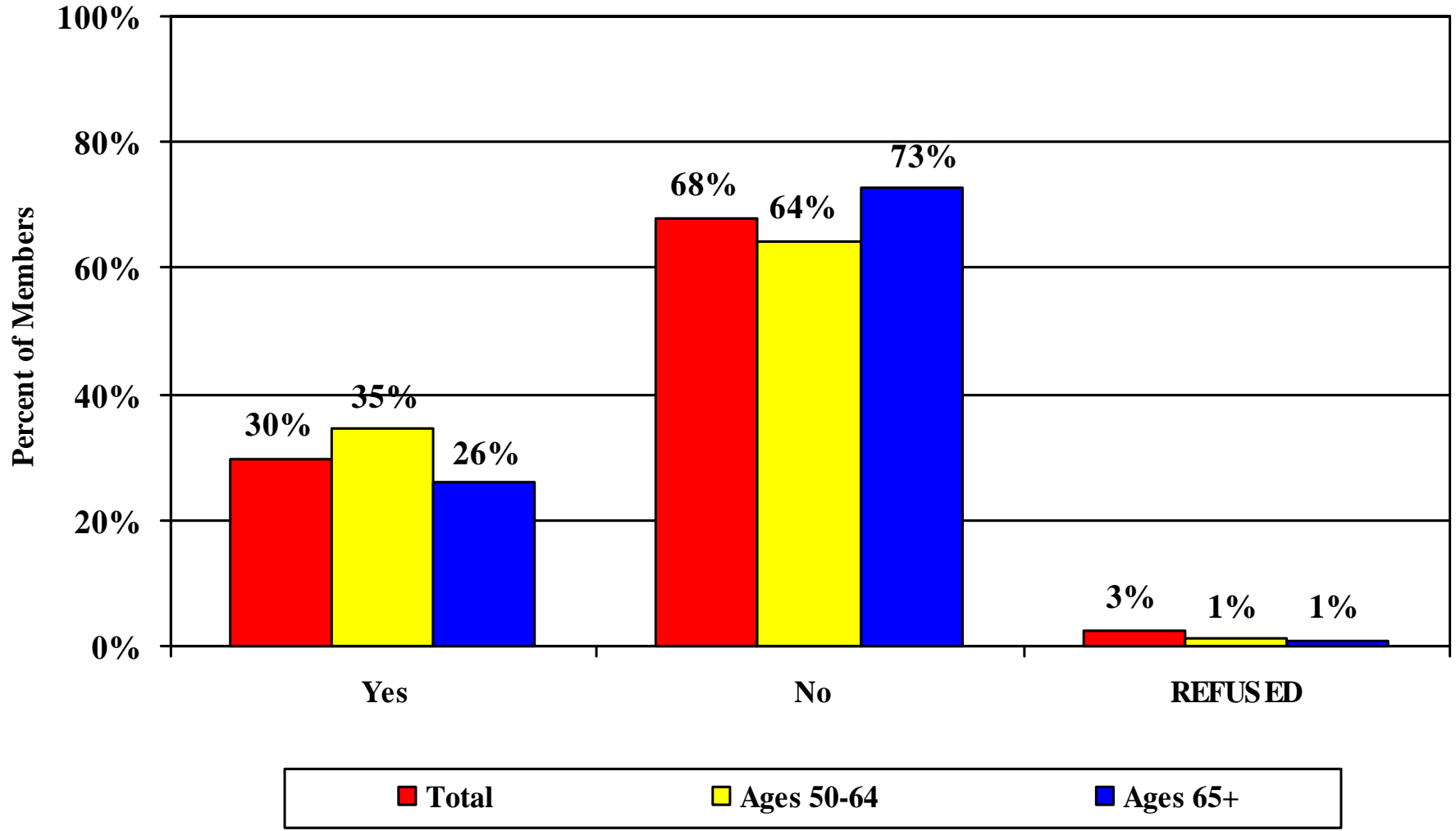
EDUCATION



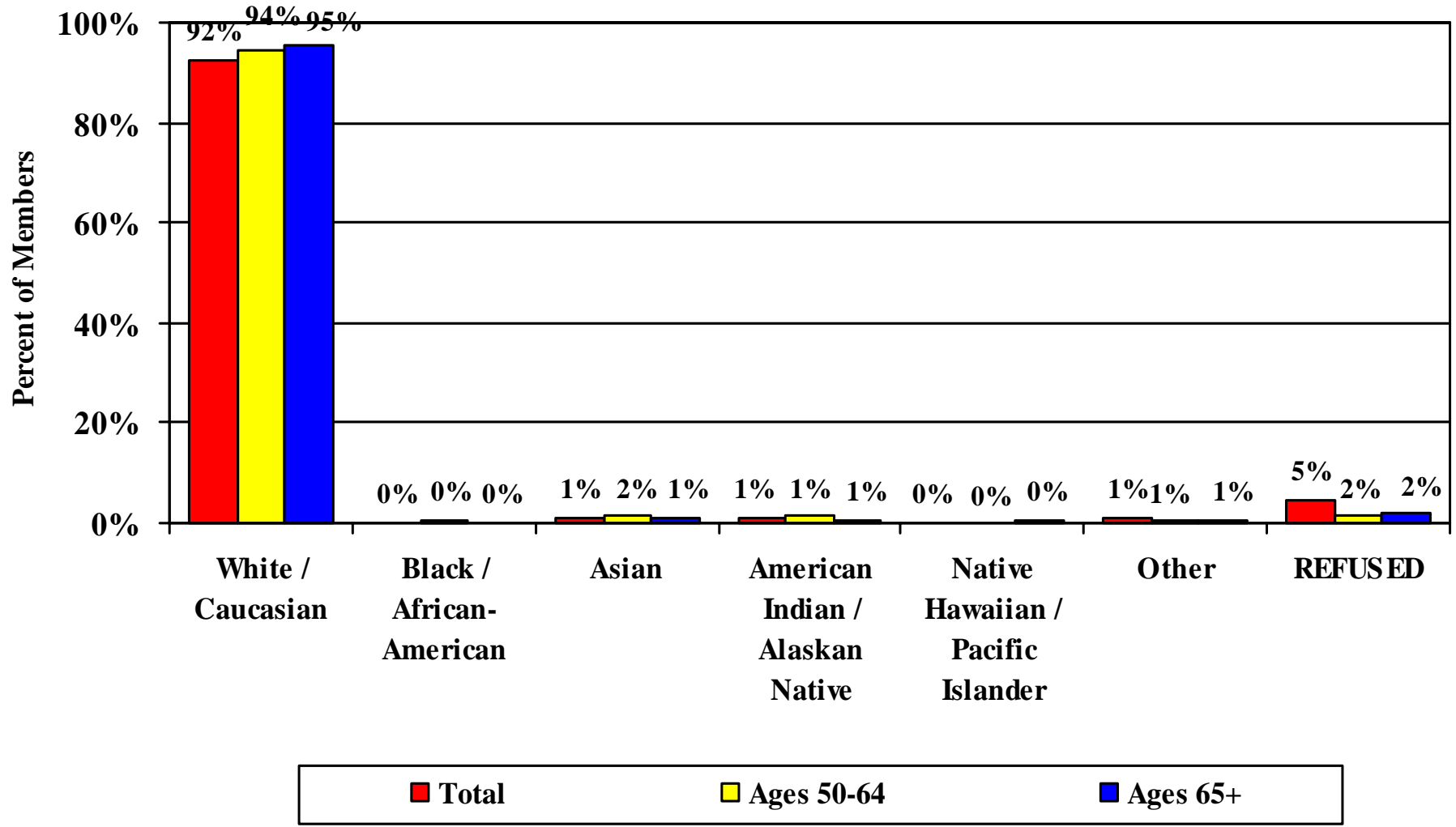
CURRENT EMPLOYMENT STATUS



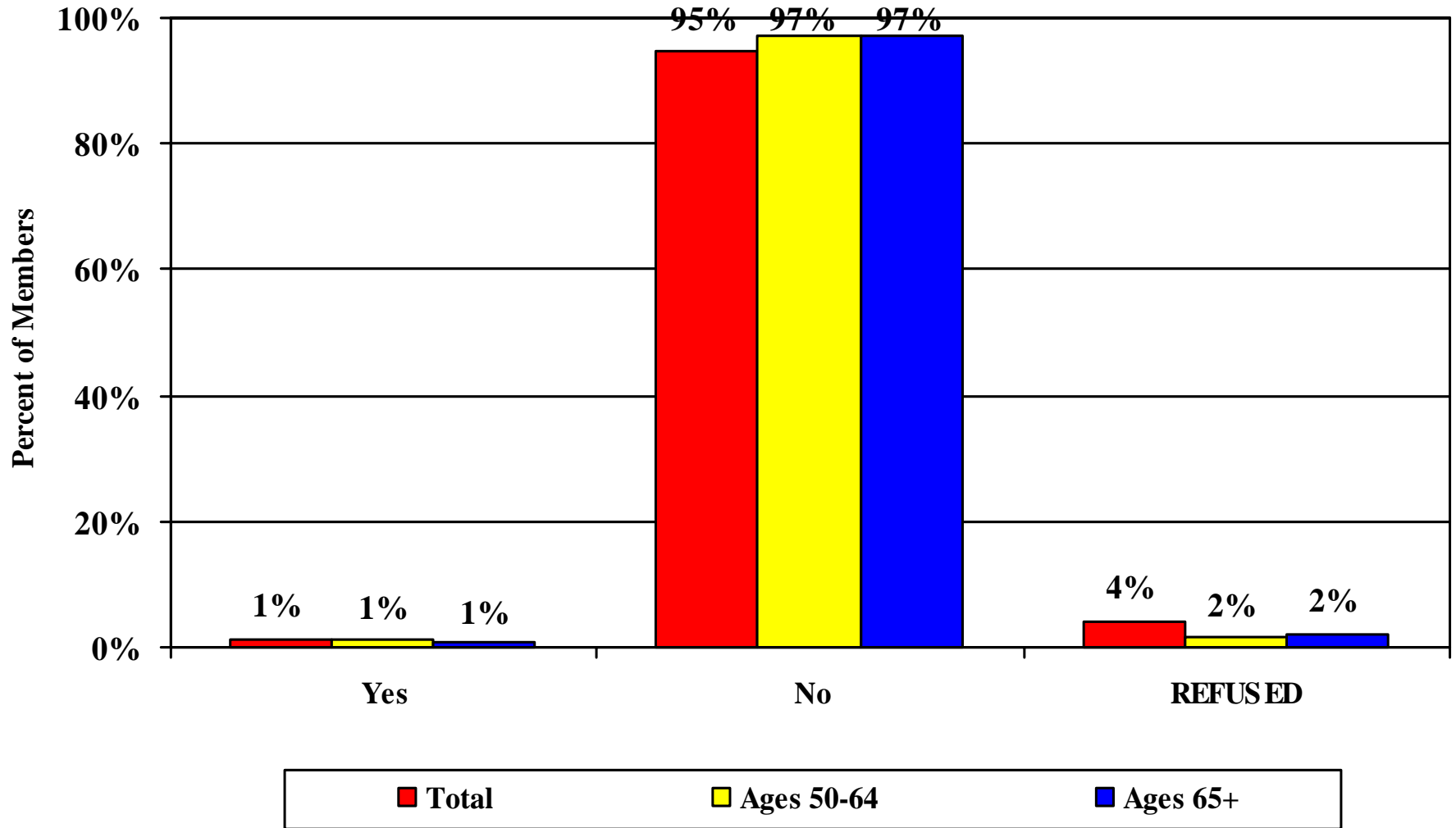
EVER BEEN A STATE OR LOCAL GOVERNMENT EMPLOYEE



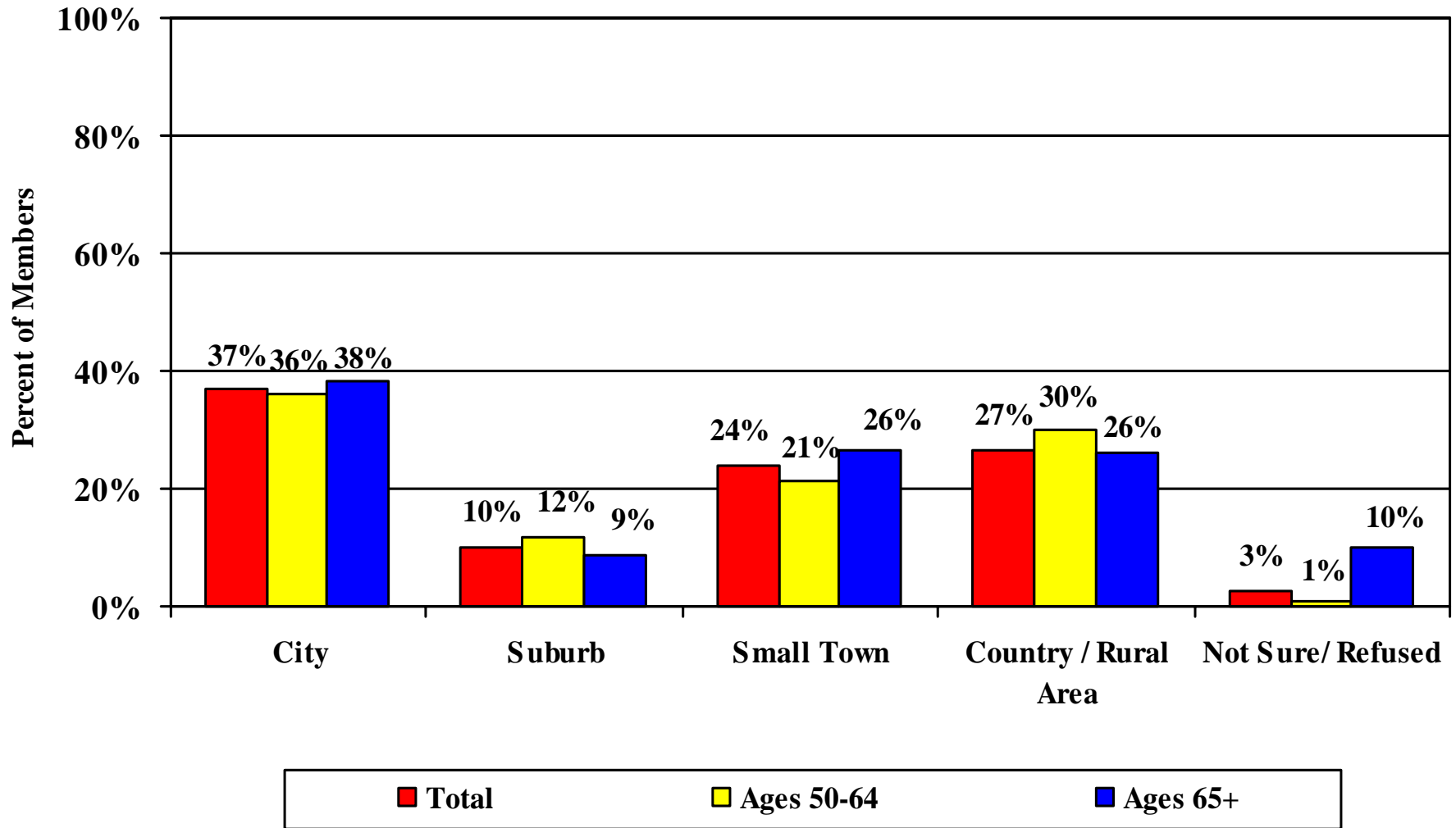
RACE / ETHNICITY



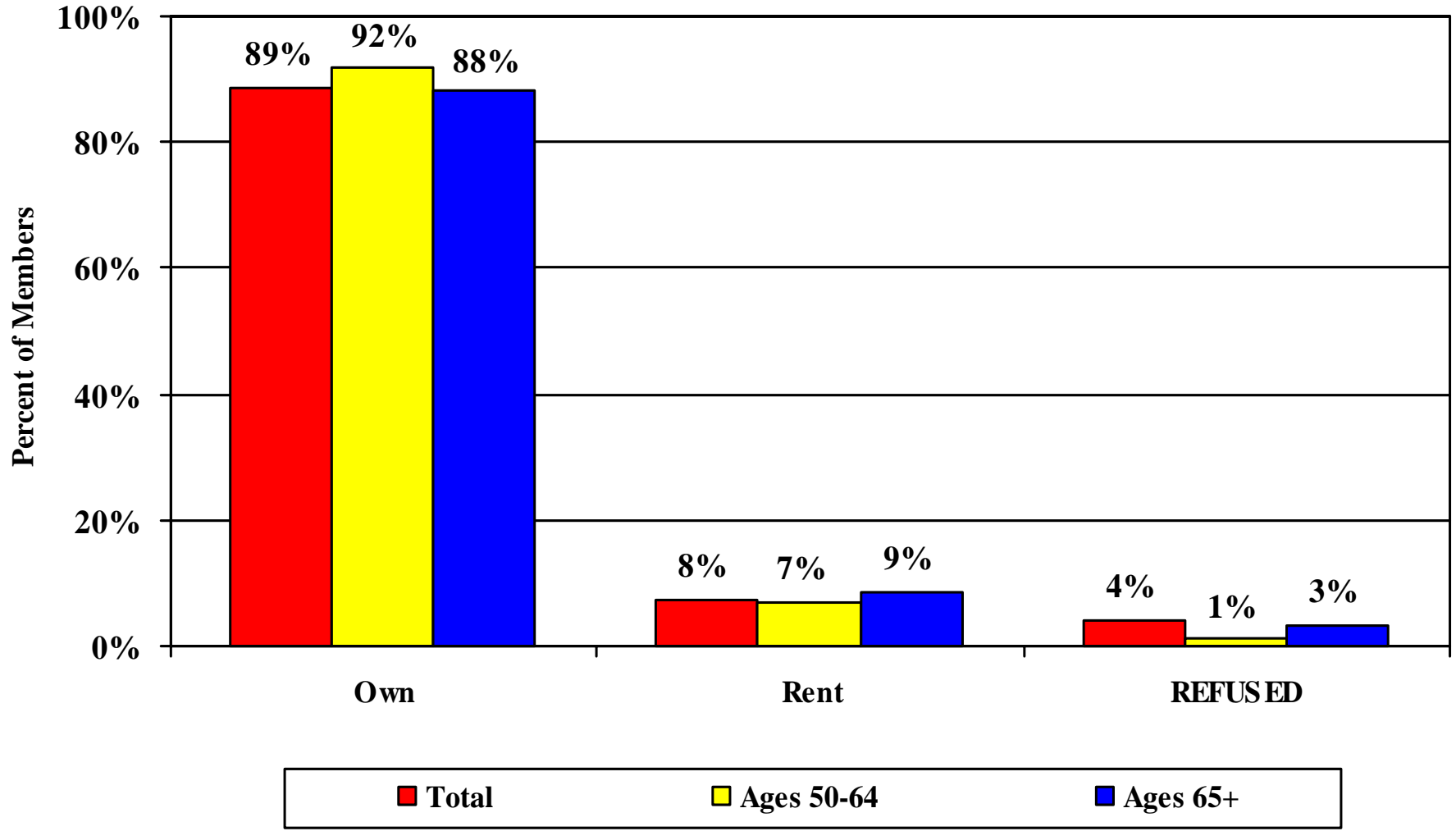
SPANISH, HISPANIC, OR LATINO ORIGIN



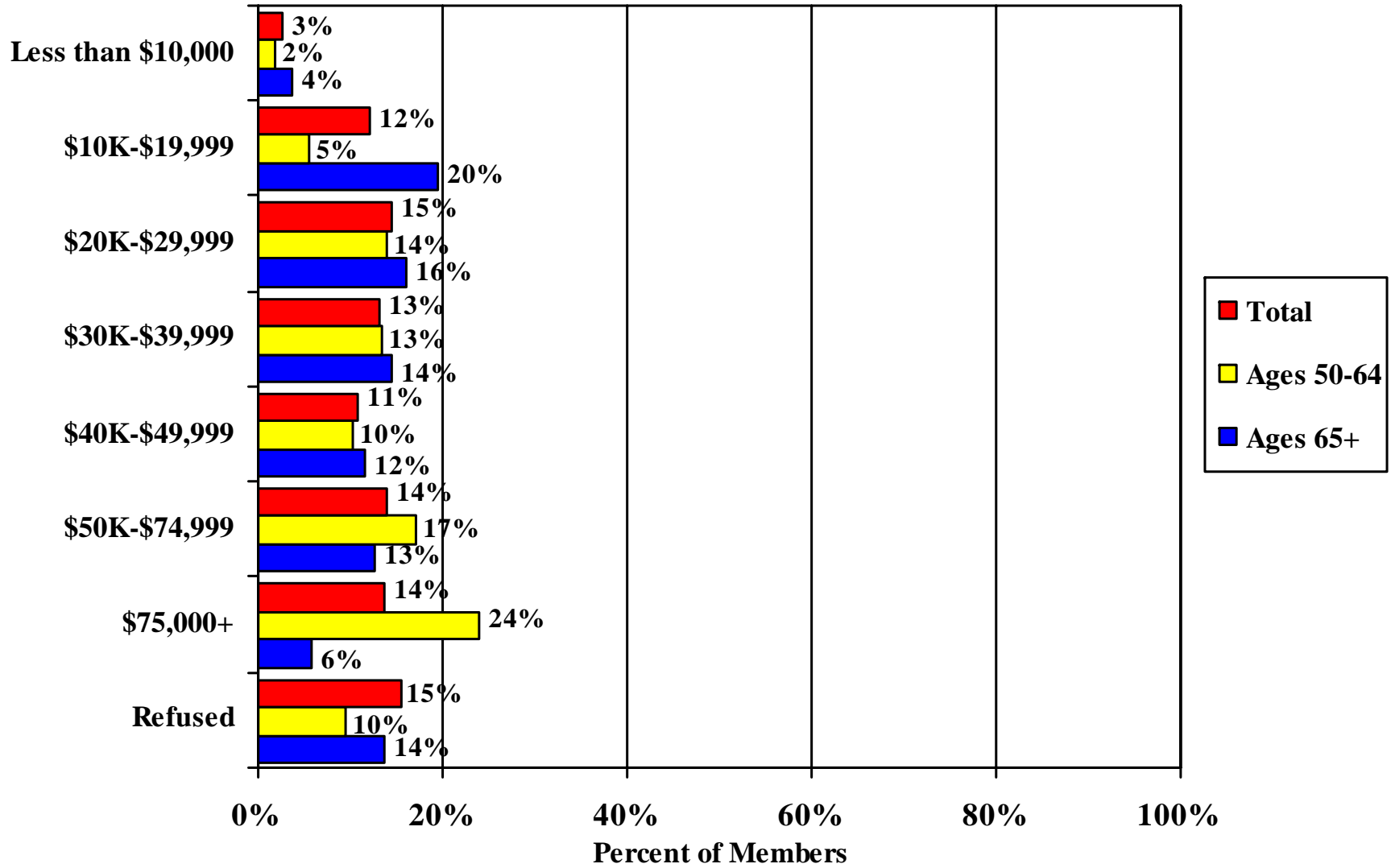
PLACE OF RESIDENCE



HOME OWNERSHIP



HOUSEHOLD INCOME



For Further Information, please contact:

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