



Montana Legislative Issues: A Survey of AARP Members



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AARP is a nonprofit, nonpartisan membership organization that helps people 50+ have independence, choice and control in ways that are beneficial and affordable to them and society as a whole. We produce *AARP The Magazine*, published bimonthly; *AARP Bulletin*, our monthly newspaper; *AARP Segunda Juventud*, our bimonthly magazine in Spanish and English; *NRTA Live & Learn*, our quarterly newsletter for 50+ educators; and our website, www.aarp.org. AARP Foundation is our affiliated charity that provides security, protection, and empowerment to older persons in need with support from thousands of volunteers, donors, and sponsors. We have staffed offices in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands.

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Background

The 2004 AARP Montana Member Survey explores the attitudes and opinions of 1,149 members in the state. Respondents were asked to rate their level of their concern about various issues and what they view as legislative priorities for the state and AARP Montana. Members were also asked about the type of AARP opportunities of most interest to them and their preferences for receiving information from AARP. Finally, they were surveyed more specifically on their opinions about and support for legislative action regarding prescription drugs, state budget reforms, and utility rates and service.

This report summarizes the weighted overall findings on all the topics covered in the survey. Throughout the report, statistics representing member responses are reported in percentages. In some instances, percentages are small and may not seem to represent a significant proportion of members, yet when projected to the total Montana membership the actual number of people may be substantial. As of November 2004, the number of AARP members in Montana was 142,861. A full annotated questionnaire is presented in Appendix A.

Methodology

AARP conducted the 2004 AARP Montana Member Survey from October through November, 2004. A random sample of 2,000 AARP members in Montana was selected from AARP's membership database. Each sampled member was contacted about the survey in four ways: a pre-notification postcard, the survey itself, a reminder postcard, and a second survey. Fifty-seven percent of the sampled Montana members returned surveys by the cut-off date, November 19th, providing 1,149 useable surveys for analysis. Thus, the survey has a sampling error of plus or minus 3.0 percent.¹ Survey responses were weighted to reflect the distribution of the age segments in the member population of Montana.

¹ This means that in 95 out of 100 samples of this size, the results obtained in the sample would fall in a range of 1.87 percentage points of what would have been obtained if every AARP member in Montana age 50 or older had been surveyed.

Highlights

Concerns and Legislative Priorities

- Affordable health insurance (87%), secure retirement savings (83%), and access to affordable prescription drugs (82%) are the top three issues of personal concern for Montana AARP members.
- The top two issues members view as high legislative priorities for AARP Montana are affordable prescription drugs (85% top or high priority), and the availability, cost, and quality of health care (86% top or high priority).

Prescription Drugs

- Two in five (43%) Montana members are very concerned about being able to afford their prescription drugs in the next two years, even though most (68%) have health and prescription drug coverage.
- Over one-third (36%) of all members estimate they spend \$100 or more each month in the past 12 months out-of-pocket on their medications.
- Over four in ten (47%) Montana members say paying for prescription drugs is a major or minor problem for them.
- Twenty-four percent of all members have engaged in at least one of the four critical measures listed in the survey to afford their medications: taken less medication, did not fill their prescription, delayed filling their prescription, or cut back on necessities.
- Most (74%) Montana members say a state prescription drug discount program is important to them, and eight in ten (79%) support such a program.
- Two-thirds (65%) of Montana members support increasing the cigarette tax by \$1 to finance a state prescription discount drug program, and three-quarters (76%) support the state seeking other ways to finance this program.

Utilities

- Most (85%) Montana members report their energy bill has gone up, and they believe electric deregulation has hurt consumers like themselves (70%).
- Over half of all members indicate renewable energy projects should be a top (32%) or high (30%) priority for receiving USB funds, and another half report that low-income assistance should be top (25%) or high (26%) priority for receiving USB funds.

Tax and Budget Reform

- Members are supportive of increases in alcohol tax (34%) and corporate income taxes (20%) to balance the state budget and maintain public services, but strongly opposed to increases in property tax (75%) and state income tax (62%).
- More members support the use of the Coal Severance Tax Trust Fund revenue to be used for government services (66%) than using the principal to balance the state budget (32%).

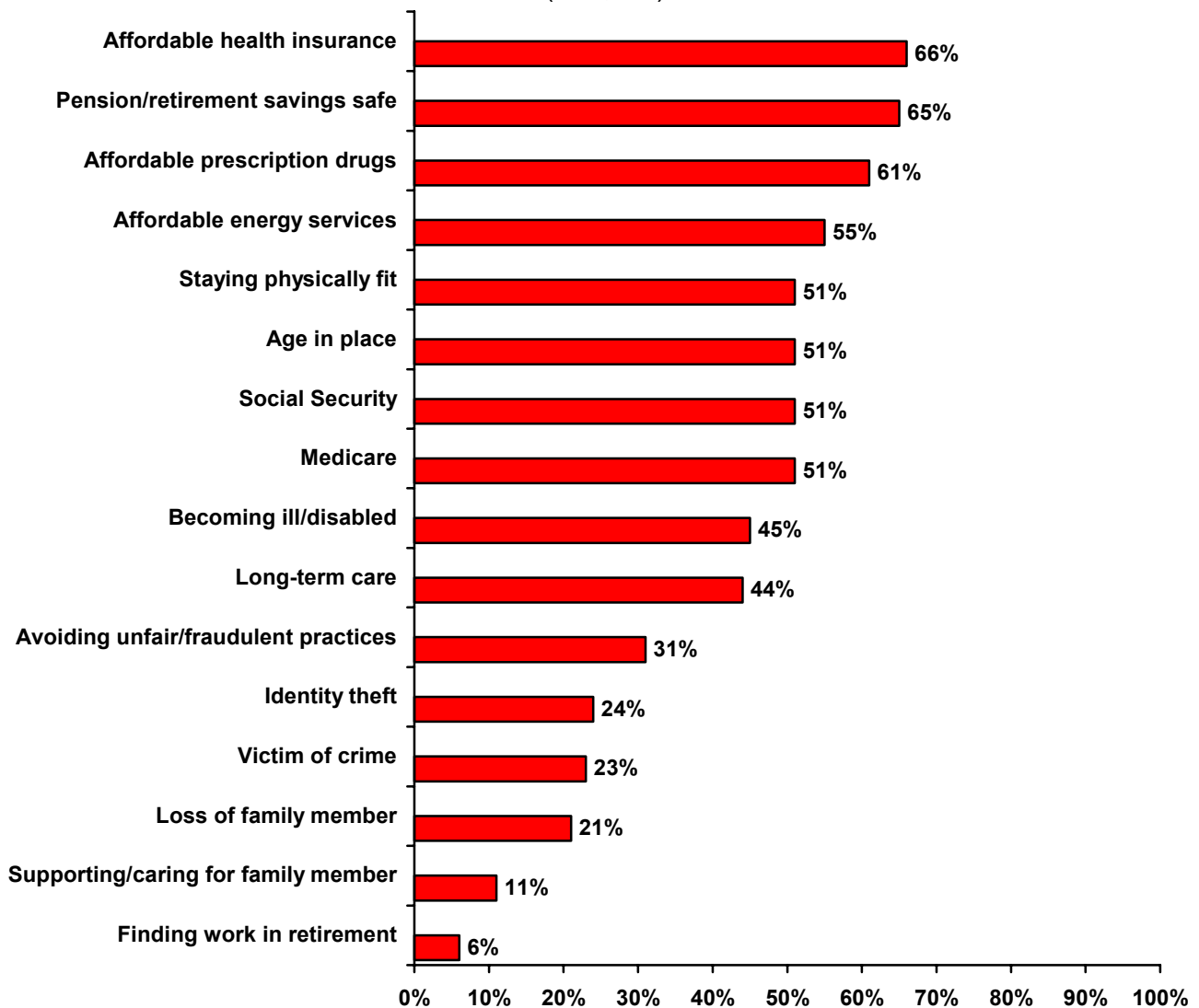
Findings

Personal Concerns

Affordable health insurance, the safety of pension and retirement savings, and affordable prescription drugs are the top three issues of extreme concern among Montana AARP members.

Of the sixteen issues Montana members were asked about, the top three extreme concerns are affordable health insurance, safety of pension and retirement savings, and affordable prescription drugs. Roughly half of Montana members are extremely concerned about affordable energy services, staying physically fit, aging in place, Social Security, and Medicare.

Issues of *Extreme* Concern Among Montana AARP Members
(N=1,149)



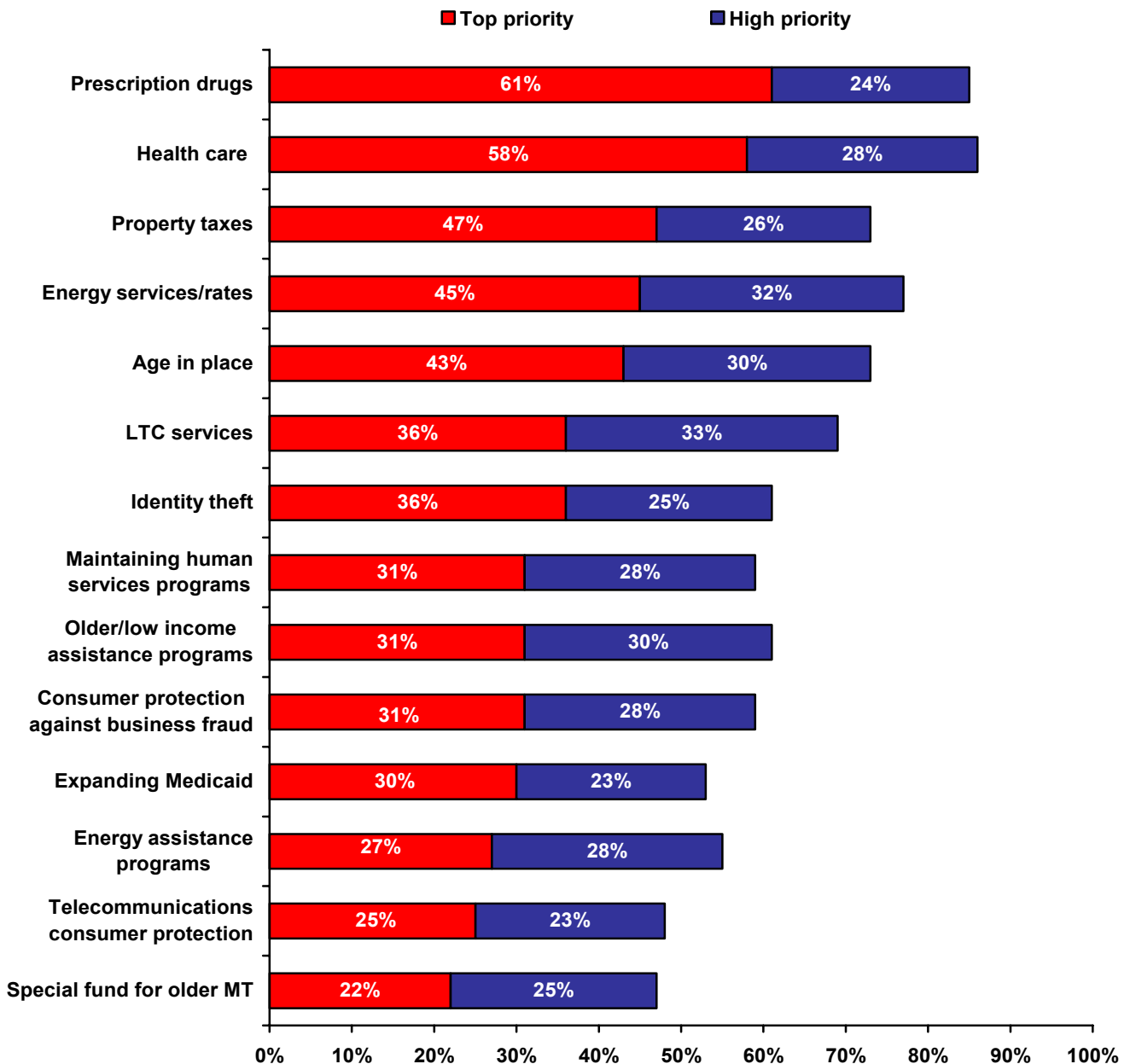
State Legislative Priorities

Members list prescription drugs and health care as their top legislative priorities for Montana AARP.

Members were asked to rate legislative priorities for the upcoming year keeping in mind what is important to them. Over eight in ten members view both prescription drugs and health care as top or high legislative priorities for AARP Montana to work on. Roughly three-quarters identified property taxes, energy rates, and aging in place among the top legislative priorities.

Issues Montana Members View as Top or High Legislative Priorities

(n=1,149)

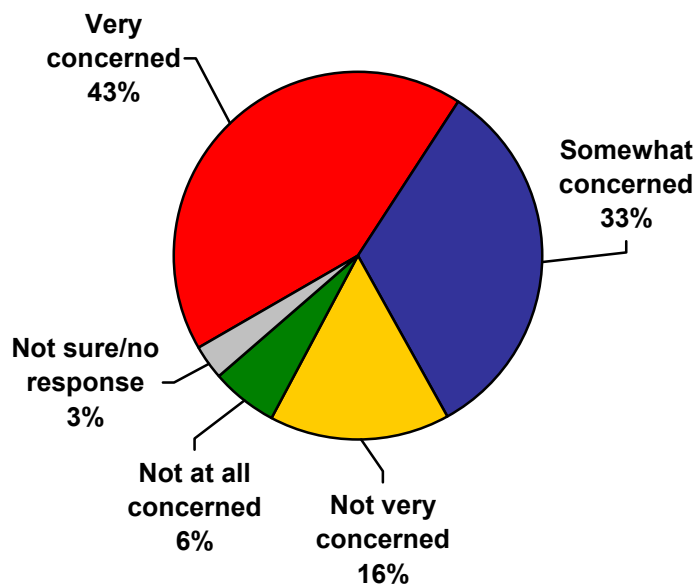


Prescription Drugs

Montanans are concerned about being able to afford their prescription drugs in the next two years, even though most have health and prescription drug coverage.

Three-quarters of Montana members are very or somewhat concerned about being able to afford the cost of needed prescription drugs over the next two years. This is a notable finding given that most (68%) members are covered by some form of health insurance that provides prescription drug coverage, nearly all (92%) have bought a prescription drug in the last 12 months, and most (92%) Montanans have not applied for the new Medicare Prescription Discount Drug Card. When asked why not, those members stated they were not eligible (45%), the discount was not enough to be worthwhile (23%), or the program was too confusing (18%).

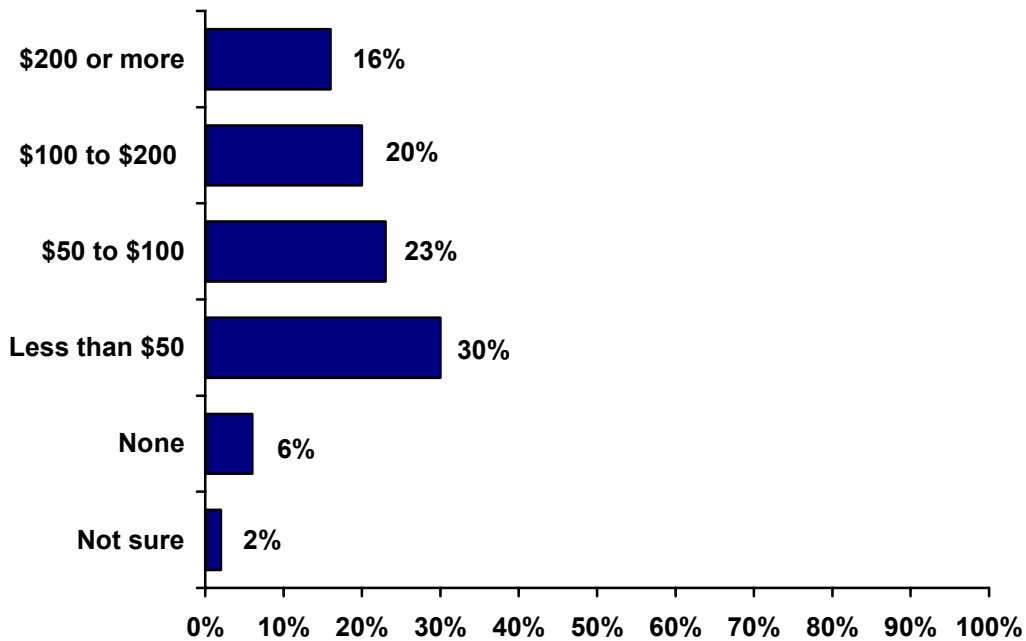
Level of Concern Among Montana AARP Members About Affording Prescription Drugs Over the Next Two Years
(N = 1,149)



Over one-third of all Montana AARP members estimate they spend \$100 or more each month out-of-pocket on their medications.

Thirty-six percent of all members indicate spending at least \$100 per month of their own money on their prescription drug purchases with about one in six spending \$200 or more.

Amount of Money Spent Out-of-Pocket per Month by Montana AARP Members in Last 12 Months
(N=1,149)



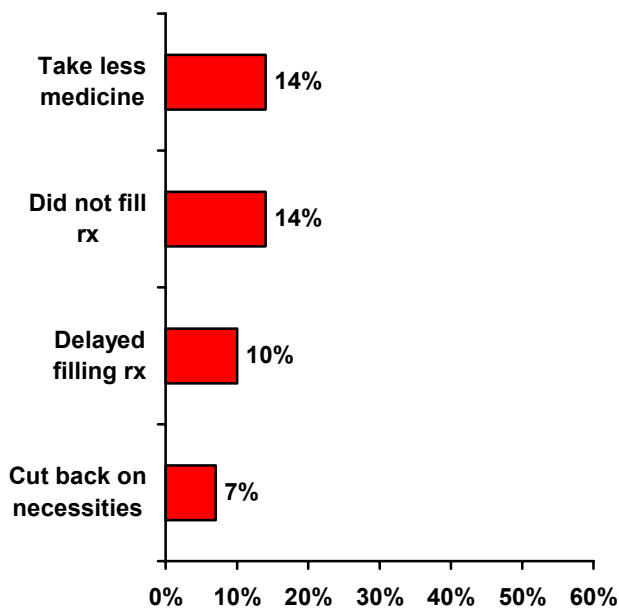
Nearly half of all Montana AARP members indicate that paying for their prescription drugs presents a financial burden for them.

Paying for a prescription drug is a major (13%) or minor (34%) problem for nearly half of all members. However, a similar proportion (50%) say they have not experienced a financial problem paying for their prescription drugs (see Appendix A, Annotated Questionnaire, Question 9).

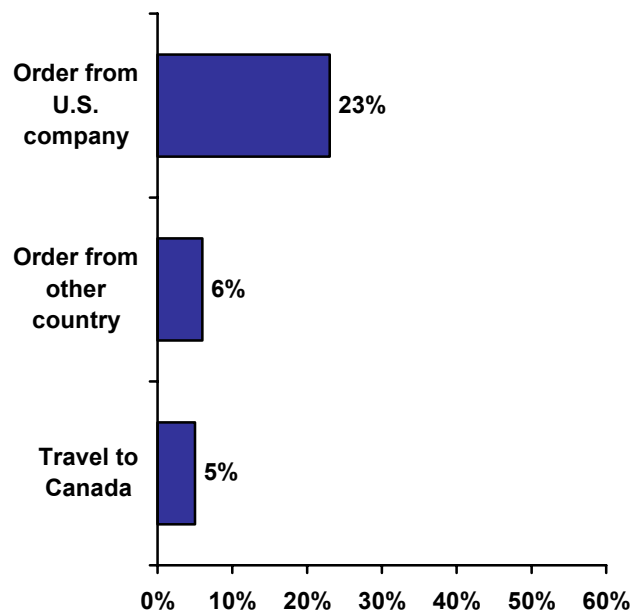
One-quarter of all Montana members have engaged in at least one of four critical measures to afford their prescription drugs.

Twenty four percent of all members have engaged in at least one of four critical or potentially risky measures listed in the survey to afford their medications or save money: took less medication, did not fill their prescription, delayed filling their prescription, or cut back on necessities. Other cost-saving measures taken by members include ordering their drugs from a United States company through the mail or the internet, traveling to Canada to buy their medications, or ordering their medications from another country via the mail or the internet.

Critical Measures Taken by Montana AARP Members To Afford their Prescription Drugs
(N=1,149)



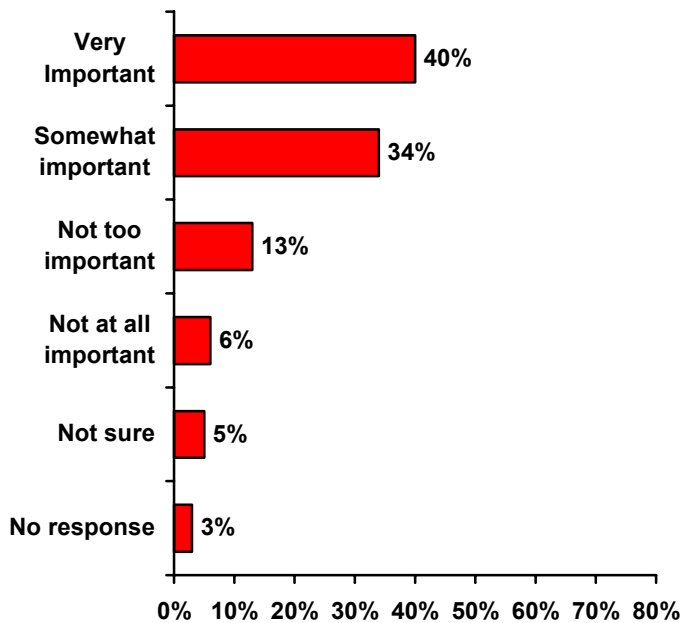
Other Cost-Saving Measures Taken by Montana AARP Members To Afford their Prescription Drugs
(N=1,149)



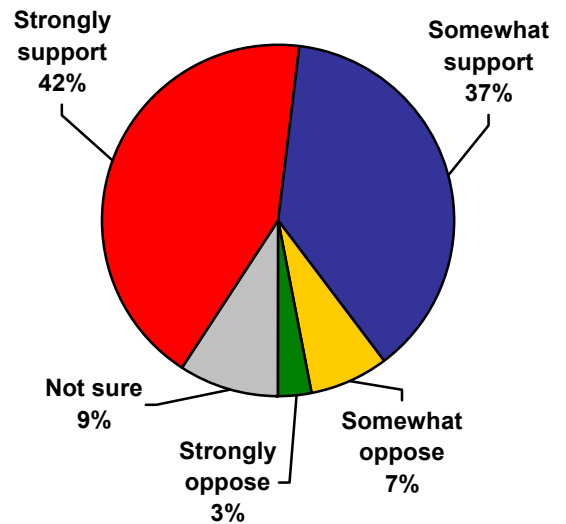
Three-quarters of all Montana AARP members say a state prescription drug discount program is important, and most would support such a program.

Three in four members say it is very or somewhat important to them that the state offers a prescription drug discount program. Additionally, eight in ten members strongly or somewhat support a state prescription drug discount program for low-income, uninsured residents. Only one in ten strongly or somewhat oppose such a program.

Importance of a State Prescription Drug Program Among Montana AARP Members (N=1,149)



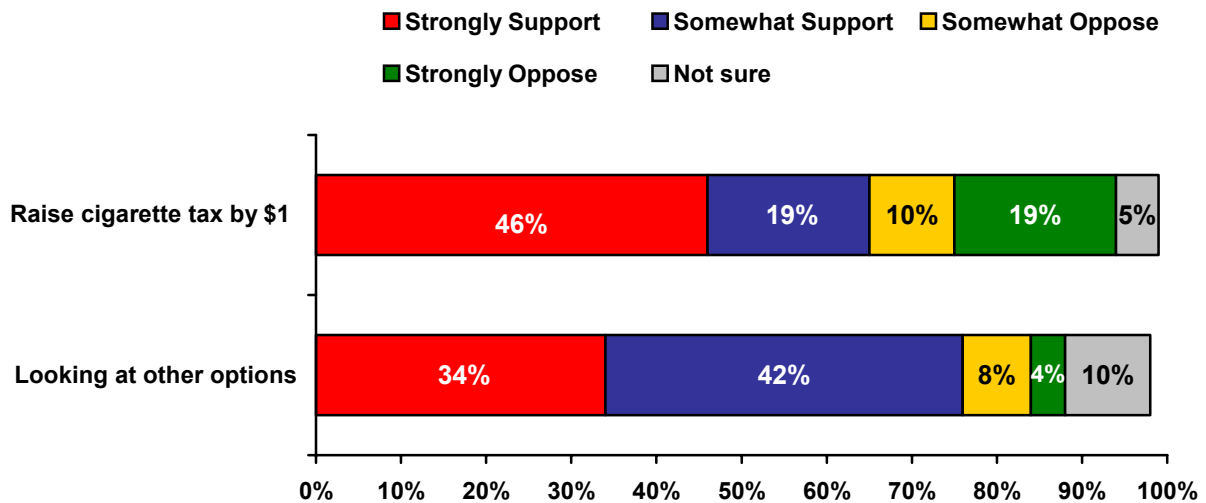
Level of Support for State Prescription Drug Program Among Montana AARP Members (n=1,149)



Over two-thirds of all Montana members support increasing the cigarette tax by \$1 to help finance a state prescription discount drug program, and three-quarters support other ways to finance the program.

Montanans were asked next if they support or oppose increasing the tax on cigarettes or looking for other ways to finance a prescription drug discount program for low-income, uninsured Montanans. Over half of all members strongly support, and one in five somewhat support, increasing the cigarette tax by \$1 to help finance a state prescription drug program. However, one-third strongly support, and over two in five somewhat support, the state looking for other means to finance this program.

Level of Support for Increasing Cigarette Tax and Other Ways to Finance State Prescription Drug Program Among Montana AARP Members
(N=1,149)



Utility Rates and Service

Over eight in ten Montana AARP members say that their energy bills has gone up over the past three years, and over four in ten report difficulty paying energy bills.

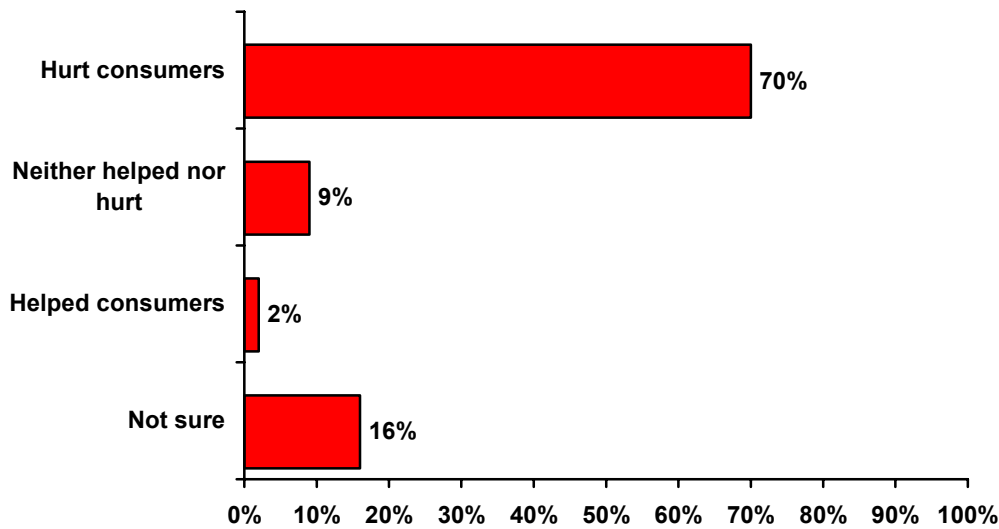
Energy rates and affordable energy services are an issue of concern for Montana members. In fact, affordable energy services ranked fourth on the earlier lists of personal concerns and legislative priorities (see pages 4 and 5 of report). Almost nine in ten (85%) say their energy bill has gone up in the past three years, while only nine percent say it has stayed same and one percent note a decrease. However, over four in ten members find it to be very (6%) or fairly (37%) difficult to pay their energy bills. A slightly higher proportion indicate having no problems (53%).

In general, most members do not experience much difficulty understanding their utility bills: two-thirds say their gas bill is *not* too (30%) or *not* at all difficult (35%) to understand; seven in ten say their telephone bill is *not* too (30%) or *not* at all difficult (39%) to understand; and eight in ten say their electric bill is *not* too (36%) or *not* at all difficult (42%) to understand. Most (69%) members say they receive their energy services from Northwestern Energy, and one-quarter (25%) participate in an electric cooperative (see Appendix A, Annotated Questionnaire, Questions 23 and 26).

Most Montana AARP members think electric deregulation has *hurt* consumers like themselves.

After reading a brief description about electric deregulation that occurred in 1997, members were asked whether they felt deregulation helped or hurt consumers like themselves. Seven in ten say they think it hurt, and only two percent think it helped consumers.

Effect of Electric Deregulation on Montana AARP Members
(N=1,149)



Most Montana AARP members have not applied for utility assistance programs, largely because they say they are not eligible or they don't want government/state help.

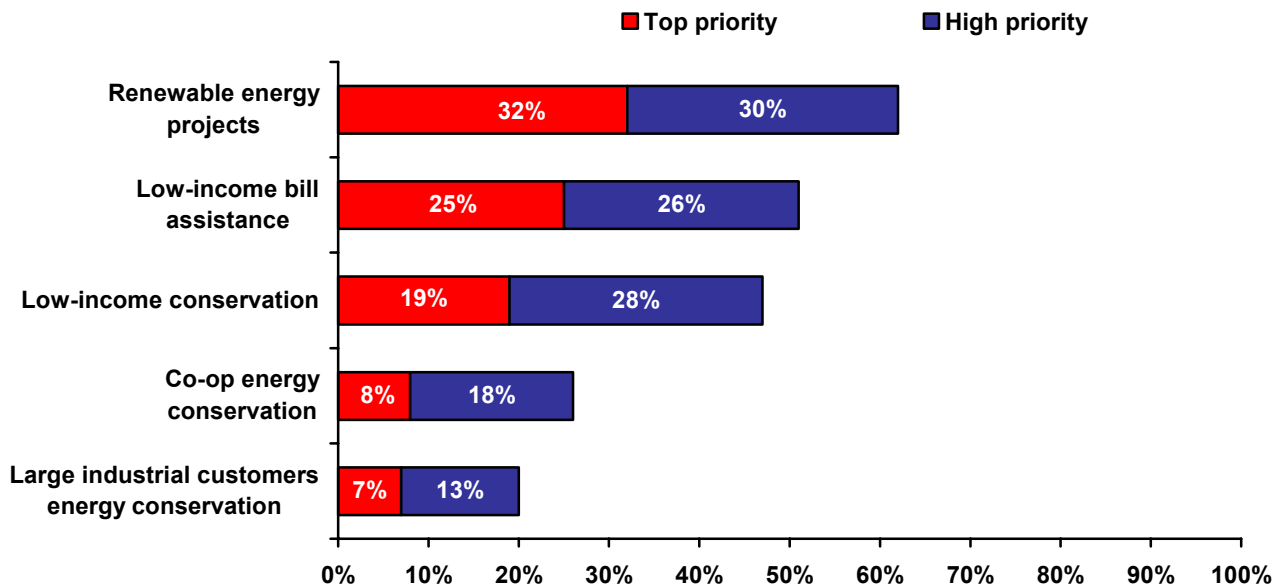
Over the 12 months previous to receiving the survey, most (86%) members report that they have not applied for help from any of the assistance programs listed. Only three percent say they applied for assistance from the Federal Energy Assistance (LIEAP) program, and less than 2 percent applied for help from either the utility or cooperative monthly bill discount (USB), or from energy weatherization services, or something else altogether (see Appendix A, Annotated Questionnaire, Question 29). Among those members who have not applied for any help, over half (59%) say it is because they are not eligible, and over one-quarter (28%) say it is because they don't want or need help from the government/state. Less than five percent indicate getting help from either other sources (3%) or family (2%) (see Appendix A, Annotated Questionnaire, Question 29a).

A majority of Montana AARP members view renewable energy projects and low income bill assistance as the top two priorities for receiving USB funds.

Members were asked to consider five possible uses of the USB funds: renewable energy projects such as wind and solar projects; low income bill assistance; low income conservation and weatherization services; energy conservation for electrical cooperatives; and energy conservation for large industrial energy customers. Over three in five Montana members view renewable energy projects as the top or high priority for receiving USB funds. Half think that low-income bill assistance should a top or high priority for the use of these funds, while slightly fewer would designate low income conservation and weatherization as priority uses.

Montana AARP Members Views of State Programs as Priorities for Receiving Universal System Benefits Funds

(N=1,149)



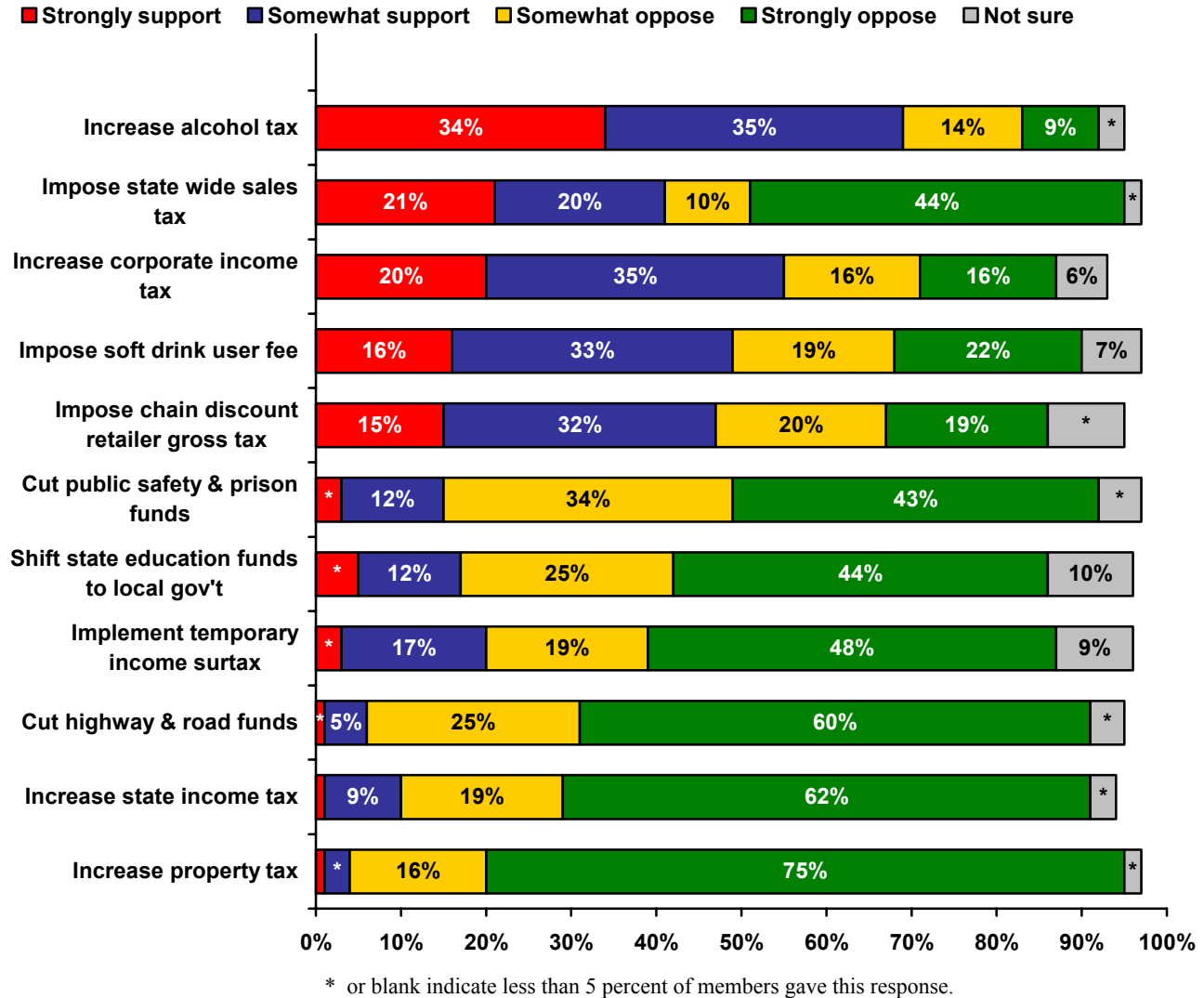
Tax and Budget Reform

Montana AARP Members support increases in alcohol or corporate income tax to balance the state budget, but are strongly opposed to increases in property tax and the state income tax.

After considering a number of possible ways the state balance or maintain the budget, Montana members indicate the greatest tolerance for an increase in alcohol tax, an increase in the corporate income tax, imposing a soft-drink user fee, and imposing a gross tax on discount retail chains. However, three-quarters are strongly opposed to increasing property tax, and just under two-thirds strongly oppose increasing the state-income tax. In addition, three in five strongly oppose cutting highway and road funds, and nearly half strongly oppose a temporary income surtax.

Level of Support Among Montana AARP Members for Possible Ways to Balance State Budget and Maintain State Services

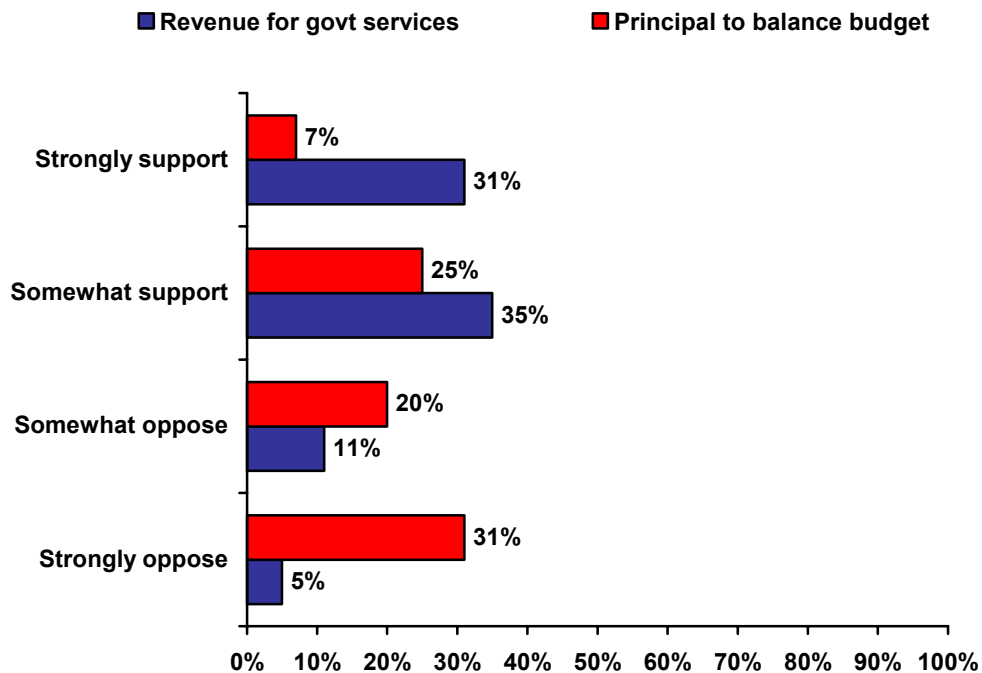
(N=1,149)



Members support the use of the Coal Severance Tax Trust Fund (CSTTF) revenue to be used for government services, but they do not support the use of principal to balance the state budget.

When asked about two possible uses of the CSTTF – for government services or to balance the budget – two-thirds strongly or somewhat support using the revenue for government services. Three in ten strongly or somewhat support using the funds to balance the state budget.

Level of Support Among Montana AARP Members for Use of Revenue Generated by CSTTF or Some of CSTTF Principal
(N=1,149)



One-quarter say they would still strongly (4%) or somewhat (21%) support using some of the principal even if it resulted in less revenue generated from the CSTTF to pay for government programs and services. Almost half (46%) of Montana members are not supportive of using the CSTTF funds if it results in less revenue generated from CSTTF to pay for government programs and services, and one-quarter are not sure (see Appendix A, Annotated Questionnaire, Questions 21 and 22).

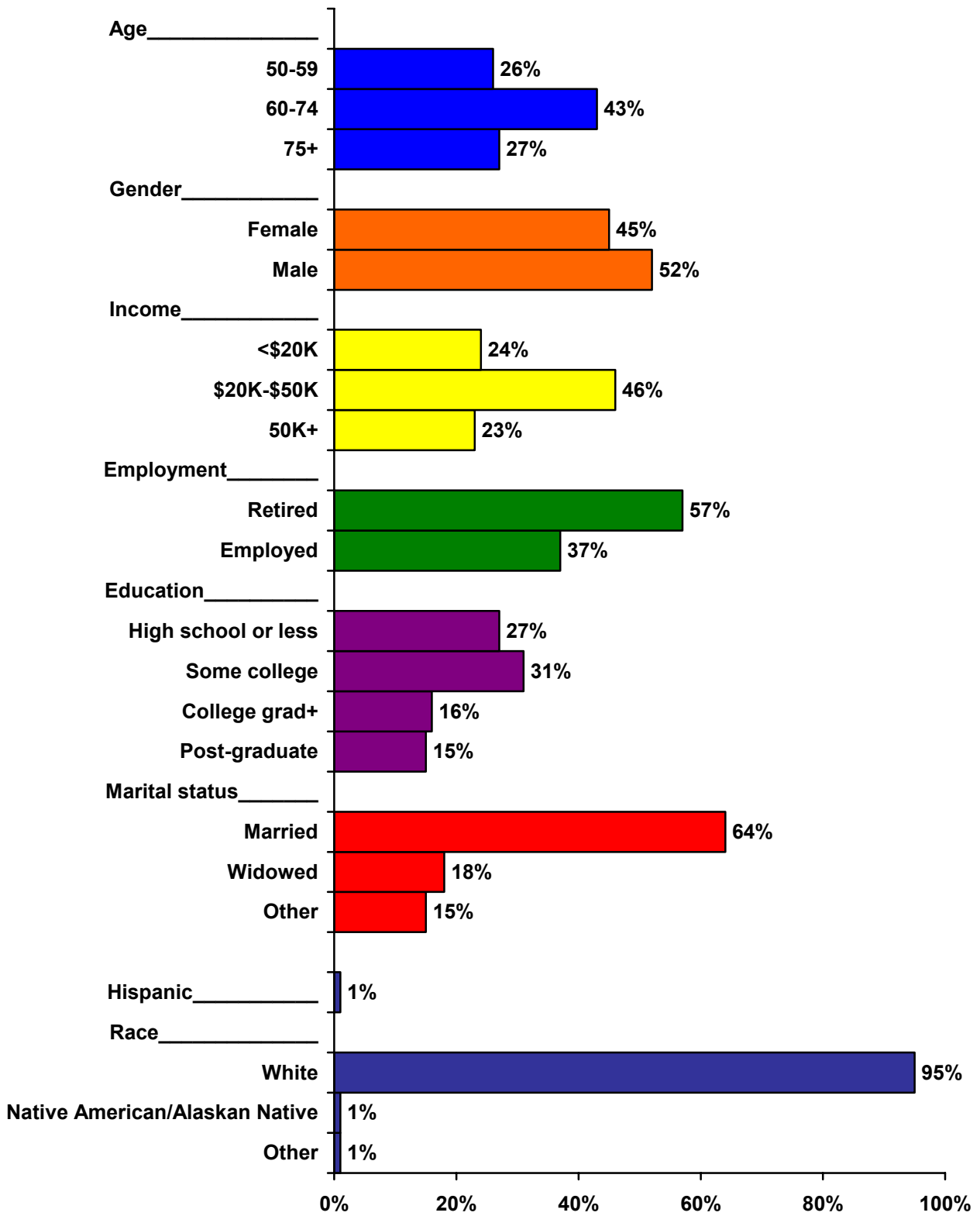
Conclusions

The data from this survey clearly show that the issue of prescription drugs is an important one among Montana AARP members and they would support the implementation of a state prescription drug program even if they may not be eligible to receive its benefits. These findings are not surprising given the number of members who rate access to affordable prescription drugs as a top concern and top legislative priority, who are very concerned about being able to afford prescription drugs in the next two years, who are spending \$100 or more out of their pocket each month, and who feel a financial burden when having to pay for their prescription drugs. Adding to this and furthering the support for a state prescription drug program is the consideration of those members who indicate they have taken significant cost-reducing measures such as cutting back on necessities like food or utilities, decreasing their dosage to make it last longer, putting off getting the prescription filled, or not filling their prescription in order to be able to afford their prescription drugs. These findings are particularly interesting in light of the data that show most members have some type of health and prescription drug coverage, and most have not applied for the new Medicare drug discount card. While many members indicate not being eligible or that the discount was not enough to be worthwhile, nearly one-quarter of those who did not apply for the Medicare drug discount card said it was because the program was too confusing.

The data from this survey also show that the majority of Montana AARP members have experienced an increase in their energy bills over the past few years, and many feel electric deregulation has hurt consumers like themselves. When asked about distributing USB funds, over half of all members say renewable energy projects and low-income assistance should be top or high priorities for receiving USB funds.

Finally, the data from this survey also show that most Montana AARP members are strongly opposed to increases in property tax or state income tax in order to help balance the state budget and maintain public services. However, most members are supportive of increases in alcohol tax or corporate income taxes. When asked about the use of the Coal Severance Tax Trust Fund (CSTTF), members are supportive of using the revenue for government services to balance the budget, but do not support using the principal.

Demographic Characteristics (N=1,149)



APPENDIX A
Annotated Questionnaire

2004 AARP Montana Member Survey

Weighted N =1,149; Response Rate = 57 %; Sampling Error = +/- 3.0

(Percentages may not add to 100% due to rounding or multiple responses. A “*” means less than 1%)

Personal Concerns

1. Below is a list of concerns that have been expressed by people age 50 and older. Please rate your own level of concern about each item using a 5-point scale where 1 means you are "not at all concerned" and 5 means you are "extremely concerned."

	Extremely Concerned				Not at all Concerned	No Response	
a. Having affordable, high quality health insurance	66%	21%	8%	2%	3%	1%	
b. Making sure your pension benefits and/or retirement savings are safe and secure	65	18	8	4	3	1	
c. Having access to affordable prescription drugs	61	21	10	4	3	1	
d. Having affordable energy services	55	24	14	3	2	1	
e. Having Medicare as a base for retirement health coverage	51	23	15	5	5	1	
f. Having Social Security as a base for retirement income	51	20	16	8	6	1	
g. Staying in your own home as you get older	51	25	14	4	5	2	
h. Staying physically fit/maintaining a healthy diet	51	28	15	3	2	1	
i. Becoming ill or disabled	45	24	22	6	3	1	
j. Having high quality long-term care for you or a family member	44	29	17	6	4	1	
k. Avoiding business practices that are unfair or fraudulent	31	21	24	14	8	2	
l. Being a victim of identity theft	24	23	33	12	6	2	
m. Being a victim of crime	23	18	33	17	8	1	
n. Dealing with the loss of a close family member	21	19	32	13	12	2	
o. Providing care or financial support for a parent, grandchild or other relative	11	16	28	19	23	3	
p. Finding work in retirement	6	14	25	20	34	3	

AARP Roles and Activities at the State Level

2. Listed below are some opportunities AARP could provide within Montana to address member interests and concerns. Please check (✓) all you would use if offered in Montana.

	<u>%</u>
Written information on topics of interest or concern to you	58
Activities to improve state laws, policies, regulations, or practices that affect you	40
One-time educational events on topics of interest or concern to you	38
Workshop series or several meetings/classes on topics of interest or concern to you	30
Volunteering your time with a worthy organization in your community	28
AARP Chapter meetings in your community	17
Volunteering your time to an AARP activity in your own community	15
Don't know/NA/ Refused	20

3. If AARP has or were to have programs, services, or activities in your community, how would you want to find out about them? Please check (✓) all you would use if offered in Montana.

	<u>%</u>
Receive information by mail (e.g., letter, brochure, flyer)	72
Read about local AARP activities in newspapers in your community	53
Tune in to a local TV channel or program	35
Hear about them on a local radio station/program	30
Call a toll-free or local telephone number for a pre-recorded list of current AARP activities, programs, and services in your community	26
Visit a website to access AARP information	26
Attend a meeting at which AARP programs and activities are described	19
Receive an email notification	18
Visit an AARP booth or exhibit located in your community	17
Contact an AARP volunteer or AARP Chapter member in or near your community	12
None	9

State Legislative Issues

4. To be effective, AARP Montana wants to work on the most important issues facing Montana AARP members. Keeping in mind what's most important to you, how much of a priority should it be for AARP to work on the following legislative issues in Montana?

(For each item, please CIRCLE the number that represents your answer).

	Top Priority	High Priority	Medium Priority	Low Priority	Not A Priority	Not Sure	No Response
a. Access to affordable prescription drugs	61%	24%	10%	2%	1%	<.5%	3%
b. Availability, cost, and quality of health care	58	28	8	2	1	<.5	3
c. Residential home property taxes	47	26	16	4	2	1	4
d. Energy services and rates	45	32	14	3	1	1	5
e. How older persons can remain in their own homes or communities as they age	43	30	19	3	2	<.5	3
f. Availability, cost, and quality of long-term care services	36	33	20	4	3	1	4
g. Protecting consumers from identity theft	36	25	23	9	3	1	3
h. Consumer protection against business practices that are unfair and fraudulent	31	28	27	8	3	<.5	3
i. Assistance programs for older, low-income state residents	31	30	23	8	4	1	3
j. Having the state maintain human services and programs, i.e. home and community based services, energy assistance, programs for seniors, children, low-income residents	31	28	26	8	4	1	3
k. Expanding Medicaid, the government health insurance program for low income people	30	23	25	10	6	2	3
l. Improving state energy assistance programs for low and fixed income customers	27	28	27	9	5	2	3
m. Strengthening consumer protections in telecommunications including wireless and wire lines	25	23	28	11	5	2	6
n. Establishment of a special trust fund for Older Montanans to help pay for their aging services	22	25	27	10	7	4	4

Prescription Drugs

5. How concerned are you about being able to afford the cost of needed prescription drugs over the next two years?

<u>%</u>	
43	Very concerned
33	Somewhat concerned
16	Not very concerned
6	Not at all concerned
1	Not sure
2	No response

6. In the past 12 months, have you or a family member bought a prescription drug?

<u>%</u>	
92	Yes
6	No
<.5	Not sure
1	No response

7. Do you or a family member get any help in paying for prescription drugs from insurance or other health coverage?

<u>%</u>	
68	Yes
29	No
1	Not sure
2	No response

8. Have you applied for the new Medicare Prescription Discount Card?

5%	Yes
92%	No
4%	No response

8a. **IF NO**: Are you going to apply for this card? (n=1051)

12% Yes	63% No	25% No response
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8b. **IF NO**: Why not? (n=659)

- 45% Not eligible
- 23% Discount is not enough to be worthwhile
- 18% Too confusing
- 7% Insurance (unspecified)
- 7% Insurance (specified)
- 4% Not needed
- 2% Other

9. In the past 12 months, has paying for prescription drugs been a major problem, a minor problem, or not a problem for you or a family member?

<u>%</u>	
13	A major problem
34	A minor problem
50	Not a problem
1	Not sure
2	No answer

10. Many people face difficult decisions when buying prescription drugs. In the past 12 months, have you or a family member done any of the following?

For each item, please CHECK (✓) the box that represents your answer.

	Yes	No	Not Sure	No response
a. Ordered your prescription drugs by mail or Internet from a <u>company in the U.S.</u> because they cost less?	23%	74%	1%	2%
b. Taken less medicine than your doctor prescribed to make it last longer?	14	83	1	2
c. Decided not to fill a prescription because of the cost of the drug?	14	83	1	3
d. Delayed getting a prescription filled because you didn't have enough money to pay for it?	10	86	2	2
e. Cut back on items such as food, fuel, or electricity to be able to afford a prescription drug?	7	90	1	2
f. Ordered your prescription drugs from a company in <u>another country</u> via the mail or Internet because they cost less?	6	91	<.5	2
g. Traveled to Canada or another country to purchase prescription drugs because they cost less?	6	91	1	2

11. In the past 12 months, approximately how much have you or a family member spent, each month out of your own pocket for prescription drugs?

<u>%</u>	
6	None
6	Less than \$10 per month
24	\$10 but less than \$50 per month
23	\$50 but less than \$100 per month
20	\$100 but less than \$200 per month
14	\$200 but less than \$500 per month
2	\$500 or more per month
2	Not sure
3	No response

12. Several states are developing information on the effectiveness and safety of prescription drugs based on scientific studies. This information would then be made available at no cost to consumers like you, doctors, and pharmacists to help consider the best drug at the best price. How useful do you think that this kind of information would be to YOU in helping you discuss your prescription drug needs with your doctor or pharmacist?

<u>%</u>	
52	Very useful
30	Somewhat useful
7	Not very useful
3	Not at all useful
6	Not sure
3	No answer

13. How important is it to you that Montana offers a state prescription drug discount program?

<u>%</u>	
40	Very important
34	Somewhat important
13	Not too important
6	Not at all important
5	Not sure
3	No response

14. How strongly would you support or oppose Montana offering a state prescription drug discount program for low-income, uninsured residents?

<u>%</u>	
42	Strongly support
37	Somewhat support
7	Somewhat oppose
3	Strongly oppose
9	Not sure
3	No response

15. In order to implement and maintain a state prescription drug discount program, Montana may need to generate revenue. One proposal to raise funds is to increase the tax on cigarettes. Currently, the tax on a pack of cigarettes is 70 cents. How strongly do you support or oppose increasing the tax on a pack of cigarettes in Montana by \$1.00 to a tax of \$1.70 per pack to help finance a state prescription drug assistance program for uninsured, low-income persons in Montana?

<u>%</u>	
46	Strongly support
19	Somewhat support
10	Somewhat oppose
19	Strongly oppose
5	Not sure
2	No response

16. How strongly do you support or oppose the state looking for other ways to raise revenue for a prescription drug assistance program for low-income, uninsured Montanans?

%	
34	Strongly support
42	Somewhat support
8	Somewhat oppose
4	Strongly oppose
10	Not sure
2	No response

Tax and Budget Reform

17. Many states are facing budget shortfalls. In order to balance or maintain the budget, states often look for new ways to raise money to maintain state services. To balance or maintain Montana’s budget, how strongly would you support or oppose each of the following options?

	Strongly Support	Somewhat Support	Somewhat Oppose	Strongly Oppose	Not Sure	No response
a. Increasing the tax on alcohol	34%	35%	14%	9%	3%	5%
b. Imposing a state wide sales tax	21	20	10	44	2	4
c. Increasing the corporate income tax	20	35	16	16	6	8
d. Implementing a user-fee on soft-drinks	16	33	19	22	7	3
e. Impose a tax on the gross sales of chain discount retailers	15	32	20	19	9	6
f. Shifting funding for education from the state to local government	5	12	25	44	10	4
g. Cutting funds for public safety and prisons	3	12	34	43	5	4
h. Adding a temporary income surtax (a tax that lasts for a limited period time)	3	17	19	48	9	4
i. Increasing the state income tax	1	9	19	62	3	6
j. Increasing the property tax	1	3	16	75	2	4
k. Cutting funds for highways and roads	1	5	25	60	4	6

18. Which of the following best describes the current state funding for health and human services in Montana?

<u>%</u>	
3	There is more than enough money in the state budget to meet the need for services and ensure quality
19	There is enough money in the state budget to meet the need for services and ensure quality
32	There is not enough money in the state budget to meet the need for services and ensure quality
43	Not sure
3	No answer

19. Montana is currently considering options to help to help balance the state budget and maintain health and human services. One proposal calls for a reduction in residential property taxes along with imposing a 4 cent sales tax on all goods and services, except on groceries, utilities, and medication. How strongly would you support or oppose this proposal?

<u>%</u>	
25	Strongly support
25	Somewhat support
9	Somewhat oppose
33	Strongly oppose
6	Not sure
2	No response

20. The Coal Severance Tax Trust Fund (CSTTF) was begun in 1978 to help lessen the impact of coal mining on services or programs such as roads or education. Most of this revenue goes into the state's General Fund to help pay for and maintain many of Montana's government services and programs such as roads, schools, buildings, and human services. Some people in Montana think the CSTTF should continue to be used for government services and programs while others think some of the principal should be used to help balance the state budget.

How strongly do you support or oppose Montana continuing to use the revenue generated by the CSTTF to pay for government services and programs?

<u>%</u>	
31	Strongly support
35	Somewhat support
11	Somewhat oppose
5	Strongly oppose
14	Not sure
3	No response

21. How strongly do you support or oppose Montana using some of the principal of the CSTTF to balance the state budget?

<u>%</u>	
7	Strongly support
25	Somewhat support
20	Somewhat oppose
31	Strongly oppose
15	Not sure
3	No response

22. Would you still support Montana using some the principal of the CSTTF to balance the state budget even if it results in less revenue generated from the CSTTF to pay for government programs and services?

<u>%</u>	
4	Yes, strongly support
21	Yes, somewhat support
46	No
25	Not sure
4	No response

Utilities

23. Which of the following companies provide energy services to your household or residence: (CHECK ALL THAT APPLY)

<u>%</u>	
69	Northwestern Energy
25	An Electric Co-op
17	Montana-Dakota Utilities Co.
16	Propane Supplier
7	Energy West
2	Mission Valley
4	Other company
2	Not sure

24. In the past three years, have your energy bills gone up, gone down, or stayed the same?

<u>%</u>	
85	Gone up
1	Gone down
9	Stayed the same
3	Not sure
3	No response

25. How difficult is it for you to pay your energy bills?

<u>%</u>	
6	Very difficult
37	Fairly difficult
42	Fairly easy
11	Very easy
1	Not sure
4	No response

26. How difficult is it for you to understand each of the following types of utility bills:

		Very difficult	Somewhat difficult	Not too difficult	Not at all difficult	Do not use this utility	No response
a.	Your telephone bill	11%	16%	30%	39%	1%	4%
b.	Your electric bill	5	13	36	42	1	4
c.	Your gas bill	5	10	30	35	10	10

27. In 1997, a bill was passed in Montana allowing electric deregulation to begin by July 2001. This bill allowed major utility companies to sell their generating assets to unregulated wholesale companies who in turn could sell electricity to consumers at competitive rates.

Do you think electric utility deregulation in Montana has helped or hurt consumers like you?

<u>%</u>	
2	Helped consumers like me
70	Hurt consumers like me
9	Neither helped nor hurt consumers like me
16	Not sure
3	No response

28. In 1997, the Legislature created an energy program to help reduce the cost of energy for various consumer groups. That program is funded by Universal System Benefits (USB) charges on energy bills. Currently, 17 percent of program funds are designated to help low income energy customers afford their electric and natural gas bills. The remaining 83 percent pays for energy conservation projects for large energy customers and electrical cooperatives, as well as for renewable energy projects. This current distribution of the USB's funds is being reconsidered.

Please indicate *how much of a priority* you think it should be for the legislature to consider each of the following for receiving some of the funds generated by the Universal System Benefits.

	Top Priority	High Priority	Medium Priority	Low Priority	Not A Priority	Not sure	No response
a. Renewable energy projects (for example wind and solar projects)	32%	30%	17%	3%	3%	7%	9%
b. Low income bill assistance	25	26	24	7	3	6	9
c. Low income conservation and weatherization services	19	28	27	6	1	8	10
d. Energy conservation for electrical cooperatives	8	18	33	14	5	13	10
e. Energy conservation for large industrial energy customers	7	13	29	18	9	14	10

29. In the past 12 months, to which of the following assistance programs have you applied for help to pay your energy bills?

- 3% Federal Energy Assistance (LIEAP)
- <.5% Utility or Cooperative monthly bill discount (USB)
- 1% Energy audits and weatherization services
- 1% Other

86% None → **29a. IF NONE**, which of the following best describes why you have never applied for such assistance: (n=988)

- 59% I'm not eligible
- 28% I don't want or need help from government/state
- 3% I get financial help from other sources when needed
- 2% I get financial help from family when needed
- 8% No response

About You

The following questions are for classification purposes only and will be kept entirely confidential.

30. Are you male or female?

<u>%</u>	
52	Male
45	Female
4	No response

31. What is your age as of your last birthday?

<u>%</u>	
26	50-59
43	60-74
27	75+
5	No response


32. What is your current marital status?

<u>%</u>	
64	Now married
18	Widowed
11	Divorced
1	Separated
3	Never married
4	No response

34. In the last 12 months, have you accessed the Internet from your home or work, or from some other source such as your local library? (Check all that apply)

<u>%</u>	
52	Yes, from home
17	Yes, from work
7	Yes, from some other source
39	No
4	No response

35. Do you have any grandchildren, including great-grandchildren or step-grandchildren?

74%	Yes 
20%	No (Go to Question 36)
6%	No response

35a. Do you provide care on a regular basis for any of these children? (n= 845)

14%	Yes
84%	No
1%	No response

35b. Do any of your grandchildren, great-grandchildren or step-grandchildren live with you in your household? (n=845)

5%	Yes
93%	No
2%	No response

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

<u>%</u>	
7	Less than high school
27	High school graduate or equivalent
31	Some college or technical training beyond high school
16	College graduate (4 years)
15	Post-graduate or professional degree
4	No response

37. Which of the following best describes your current employment status?

<u>%</u>	
24	Employed or self-employed <u>full-time</u>
13	Employed or self-employed <u>part-time</u>
57	Retired and not working
3	Other such as homemaker
<.5	Unemployed and looking for work
3	No response

38. What is your race?

<u>%</u>	
95	White or Caucasian
<.5	Black or African American
1	Hispanic, Spanish, Latino
<.5	Asian
1	Native American or Alaskan Native
0	Hawaiian or Pacific Islander
3	No response

39. What was your annual household income before taxes in 2003?

<u>%</u>	
7	Less than \$10,000
17	\$10,000 to \$19,999
20	\$20,000 to \$29,999
14	\$30,000 to \$39,999
12	\$40,000 to \$49,999
12	\$50,000 to \$74,999
11	\$75,000 or more
9	No response

40. Do you currently smoke cigarettes on a regular basis?

<u>%</u>	
10	Yes
88	No
1	No response

Thank you for completing this survey. Please use the postage-paid envelope and return it to State Member Research, AARP, 601 E Street, NW, Washington, DC 20049, by November 19, 2004.

AARP

Knowledge Management

For more information contact Jennifer H. Sauer (202) 434-6207