



A Quality-of-Life Study for Montana

Results of a survey of Montana residents

Commissioned by PPL Montana to stimulate dialogue, build understanding and forge collaboration for a better tomorrow. Conducted by Roper Public Affairs, with assistance from the University of Montana Bureau of Business and Economic Research.

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Background & Objectives

This report presents the results of a study commissioned by PPL Montana and conducted by the Roper Public Affairs Group of GfK NOP Research and Consulting.

The research was designed to gain insight into Montana residents' opinions, hopes and concerns regarding the quality of life and state of affairs in Montana. PPL Montana's goal in conducting this survey was to determine what is important to Montanans and to share this information with government and private sectors to stimulate dialogue, build understanding and forge collaboration for a better tomorrow.

Research Design and Methodology

The quantitative study was designed, with help from the University of Montana Bureau of Business and Economic Research, to represent Montana residents age 18 and older. Random digit dialing (RDD) procedures were used to select a statewide representative sample of households in Montana. A twenty-minute survey was administered via Computer Aided Telephone Interview (CATI) to 1,013 adults. Survey questions were developed based on issues identified through focus groups with Montanans.

Interviews were conducted from December 1 to December 14, 2005. The data was weighted for age, gender and region (defined as the six Census districts of Montana), with weighting targets drawn from the latest U.S. Census population estimates.

The response rate for this study, as defined by AAPOR Response Rate 3, was 23%.

The findings in this report, which were compiled by Roper, are projectable to the population of Montana within a sampling error of +/- 3%. The margin of sampling error is larger for subgroups.

Executive Summary

- 1) **Montanans are passionate about living in Montana—whether they were born in the state or are newcomers.** The majority of residents express very positive attitudes toward living in their state—and feel that the future changes to their living standards will be for the worse, not the better.
 - a) **Montana is one of the best places to live.** Three-quarters (78%) say it is at least above average relative to all the states in the Union, and half (49%) say it is “one of the best.”
 - b) **State is mostly on right track.** Six in ten (63%) Montanans say things in their state are “going in the right direction”—more than twice as many as think things are “off on the wrong track” (26%).
 - c) **Growing the economy is critical—because you can’t eat the scenery.** Two-thirds “strongly agree” that “a strong, healthy business climate is essential for the future of Montana,” and 55% “strongly agree” that the state government should actively work to attract business and thus more higher-paid jobs.

- 2) **Montanans value their state’s clean environment and its natural beauty, but also cite many other reasons for living in Montana.** These items are rated 2 and 3, respectively, out of a list of 11 items that Montanans rated on why they chose to live in Montana.
 - a) **Montana is a great place to raise a family and feel a sense of community.**
 - i) Eight in ten (79%) say it is “very important” that “Montana is a good place to raise children.” This is the highest-rated element of all those assessed in the survey.
 - ii) Six in ten (59%) say they personally consider “the sense of community” to be “very important” in deciding to live in Montana.
 - iii) Low crime rates are “very important” to 70% of Montanans.
 - b) **In contrast to its natural beauty, Montana’s job opportunities are viewed less positively.** The job market is much less of a motivator to Montanans as a reason to live in the state, with only 41% citing it as “very important.”

- 3) **Pocketbook issues top list of “very serious” future problems facing Montana.** Many Montana residents worry about being able to afford to live in the state in the future.
 - a) **Energy costs, the lack of good, well-paying jobs and the affordability of healthcare are cited as “very serious” problems for the future of Montana.**
 - i) Around four in ten foresee “very serious” problems from rising property taxes, the lack of affordable housing and the level of unemployment.
 - b) **There are mixed views toward the strength of the state economy.** Six in ten Montanans describe the state of the economy as either “fair” (45%) or “poor” (16%). Montanans are comparatively more positive toward the state of their own household’s finances, with over half of Montanans rating their own household’s situation as either “good” (44%) or “excellent” (12%).

c) **Montanans are less concerned about losing a feeling of community due to population growth, but view threats to the outdoors lifestyle more seriously.**

The implication from these survey findings is that managing growth is a problem that Montana can still control.

- i) Only 36% think the overall problem of insufficient planning to cope with Montana's growing population will be a problem and only one in five foresees "very serious" problems in "tensions between long-term Montana residents and new people moving here" or "losing a sense of community."
- ii) Half consider the loss of access to public lands and waterways a "very serious problem."
- iii) Three in ten anticipate very serious problems arising from the number of vacation and second homes or from increased pollution.

4) **Montanans are mostly optimistic about the influx of new residents, but do harbor some concerns about change.** Two factors in the data play a key role in shaping favorable opinions toward new Montana residents: overall optimism and environmental attitudes.

- a) On the positive side, six in ten (61%) agree that "Montana benefits from the different attitudes and outlooks of its newest residents"—though they are three times as likely to agree "somewhat" (47%) rather than "strongly" (15%). Just over a third (36%) disagree.
- b) Attitudes are more divided when Montanans are asked whether "the new people moving into Montana are changing things for the worse." Just over half (52%) agree; 45% disagree.
- c) Attitudes toward change are clearly linked to future expectations. People who expect the quality of life in Montana to be worse five years from now are less likely to say the state benefits from the outlooks and attitudes of new residents, and more likely to say new people are changing things for the worse.

5) **Montanans seek companies that are honest and treat their employees right.**

Montanans also seek corporate citizens that are ethical, show concern for the community and care about the local environment.

- a) **Montanans feel business and environmental interests can coexist.** A solid majority—57%—disagree that Montanans have "to choose between a stronger economy and preserving our traditional outdoors way of life;" a third disagree *strongly*.
- b) When asked to rate the important elements of businesses that are good corporate citizens, the **first tier** includes businesses that "care about their employees" and are "open and honest with the public."
- c) In the **second tier** are items that may be more expected of a company, including ethics, jobs, products and concern about the community. Companies may not be rewarded for doing these things, but are punished for not doing them.

6) Tourism and the energy sector are both viewed as positives for Montana's economic growth engine.

- a) **Tourism is having a positive impact.** Eight in ten (82%) say tourism has a "positive impact" on Montana's local business and is "essential" for economic development. Fewer than one in five (17%) see tourism as a source of mostly "low paying jobs."
- b) **Renewable resources and investment in technology are seen as positive factors for the energy sector.** Nine in ten (89%) agree that "renewable energy sources like wind farms" can help advance the dual goals of economic development and environmental protection. As many (87%) agree that energy sector investment in technology and infrastructure is "essential" for future economic development.
- i) **Residents are somewhat skeptical about energy companies and profits.**
Six in ten believe that "energy companies in Montana unnecessarily have been increasing profits and making higher profits."
- c) **Opinions on coal are mixed and Montanans are divided on who should take the lead on this issue.** The issues of coal reserves and coal extraction are on Montanans' radar but opinions have not formed fully on either issue. More than half (57%) have heard either "a fair amount" or "a great deal" about their state having large coal reserves. Just under half (45%) have heard at least a fair amount about new coal extraction technologies that reduce the environmental impact of the process.
- i) Asked who should take primary responsibility for developing Montana's coal reserves, a plurality (44%) says they have not yet heard enough to say.
- ii) The rest are divided on whether public (28%) or private (24%) interests should be primarily responsible.

7) Methamphetamine drug abuse is a looming threat to Montana's communities.

Concern about methamphetamine use and drug abuse appears at the top of the list of social concerns, with seven in ten Montanans expressing "very serious" concerns on this issue. This is the highest-rated future threat to Montanans' way of life among all items tested in the survey.

8) Montanans give their public schools and universities a "B". Although Montanans hold positive views of primary and secondary education systems, as well as higher education in the state, they do acknowledge that there are challenges.

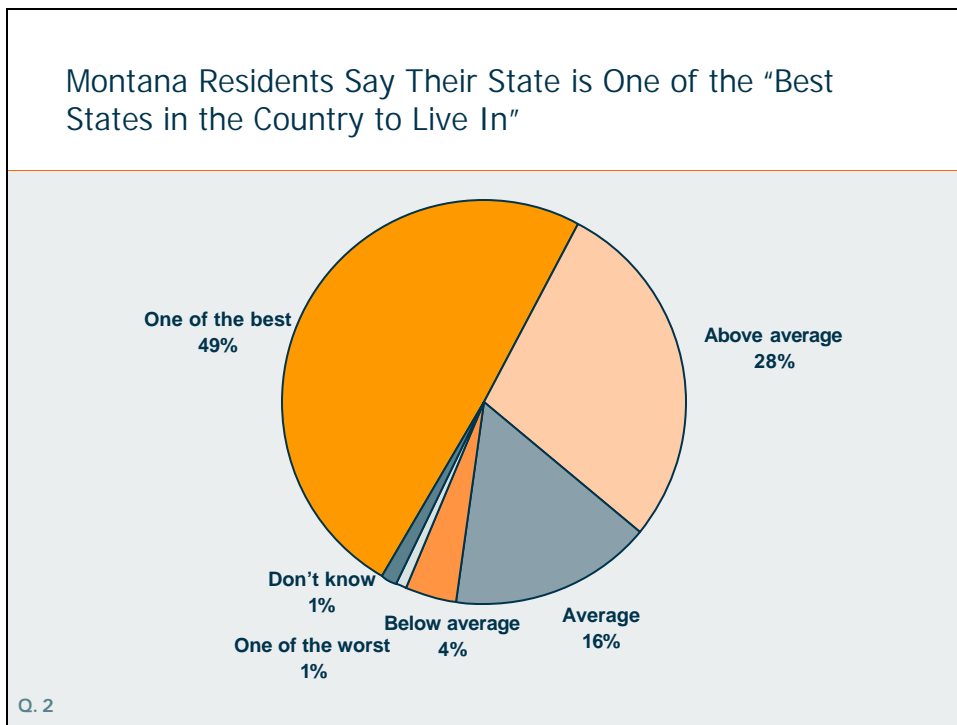
- a) **Funding for public schools is a serious problem.** Six in ten Montanans give public school education in the state a grade of "B" or better. Nearly half (46%) say the level of funding for public schools is a "very serious problem." Concern about funding levels far outstrips either overcrowding or falling enrollment numbers.
- b) **Rising tuition costs concern Montanans.** Seven in ten give the state's public colleges and universities a "B" or better for quality. Although the quality is generally seen as above average, nearly half (46%) say rising tuition costs are a "very serious" problem.

Survey Findings

1. What Makes Montana Great? The Great Outdoors and Great Communities

Montana is One of the Best Places to Live

Half of Montanans (49%) say it is “one of the best states in the country to live in,” and three-quarters (78%) rate it as above average or better, relative to all the states in the Union.

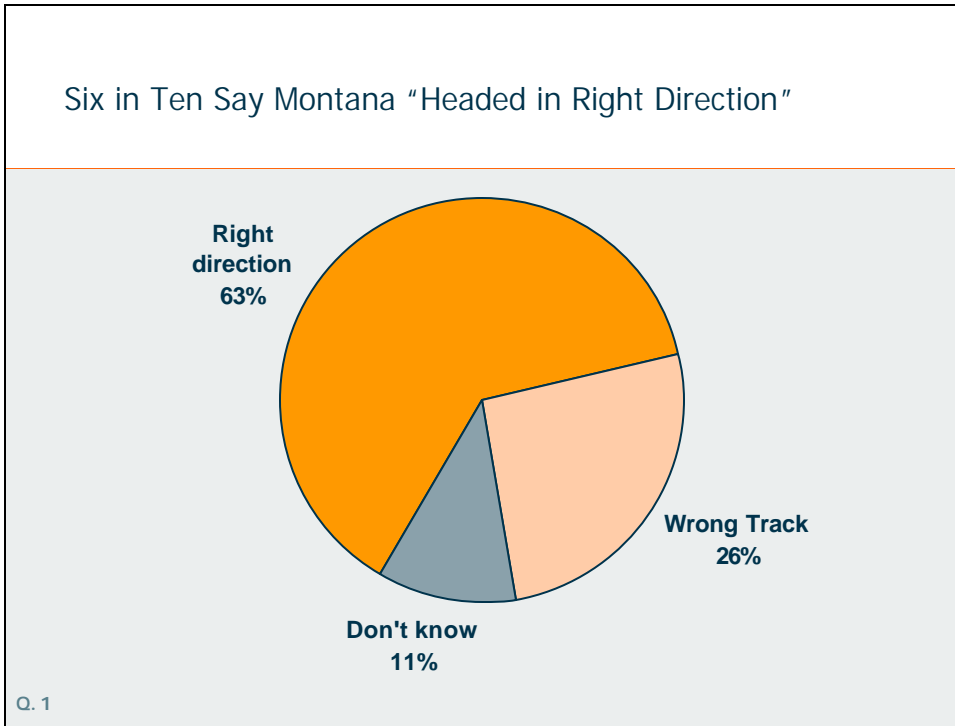


Although there is a high level of agreement among Montanans, positive attitudes tend to be stronger among residents age 60 and over (54% “one of the best”) versus those under age 50 (47%). Life-long Montana residents (52%) are only slightly more likely than people who moved to Montana as adults (45%) to say their state is one of the best—indicating, as shall be seen throughout this survey, that new and old Montanans share much common ground in their love of the state. Self-described Eastern Montanans (22%) are a little more likely than Western Montanans (14%) to describe Montana as “average”—but among both groups their overall opinion is positive.

This overwhelmingly positive attitude of Montanans' toward their state reverberates throughout the survey. Montanans clearly articulate what they love about their state—primarily its natural beauty and the community of people who live there. They also share opinions on the forces they fear might change Montana for the worse, and the steps that the people and the business community can take to steer Montana toward the future.

Most Residents Say Montana is On the Right Track

Six in ten (63%) Montanans say things in their state are “going in the right direction”—more than twice as many as think things are “off on the wrong track” (26%).



Positive attitudes toward Montana as a place to live and its current direction are shared across all key demographic groups and regions. As we shall see throughout this report, this optimism toward Montana’s current direction is indicative of a wider optimistic mindset that values what Montana has to offer today, foresees a better quality of life in the future, and considers the inflow of new residents as a generally positive force for the state.

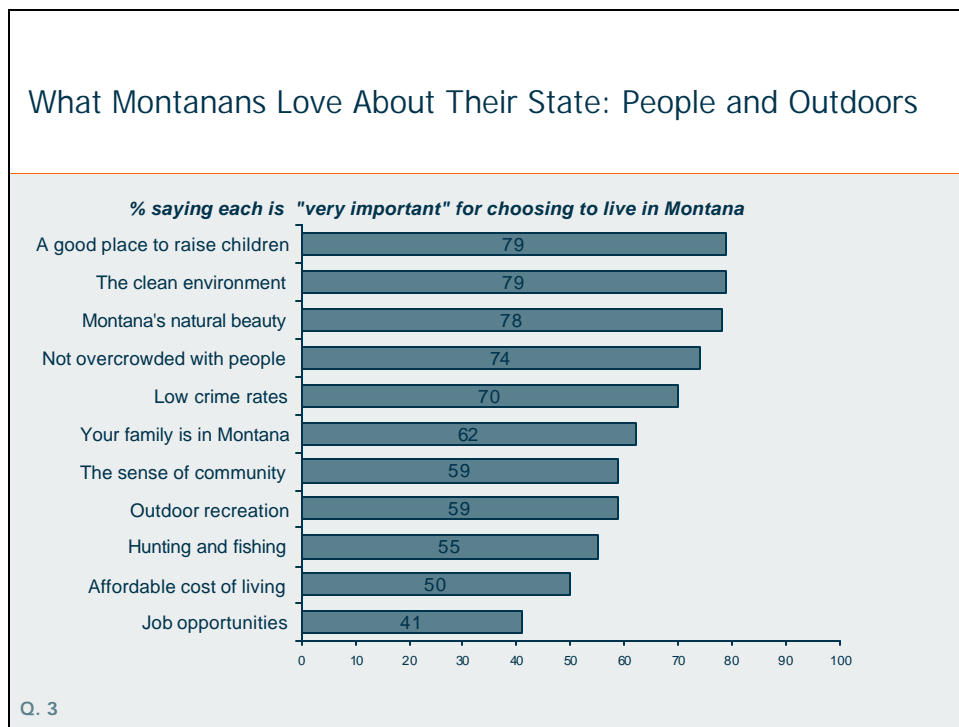
Conversely, the quarter who feel Montana is heading down the wrong track cannot be identified simply by their age, socioeconomic status or other demographic variable. Rather, they express a set of concerns—concerns that reverberate throughout the survey—that the inexorable changes underway in Montana today threaten to bring new problems, while possibly destroying what they value most about Montana and what makes it unique.

Community is Key to the Quality of Life in Montana

Having observed the positive attitudes most Montanans have toward the “state of the state” today and its future prospects, we can now consider what qualities and attributes are most important to Montanans—and what they most fear will change for the worse in the future.

We asked respondents why they choose to live in Montana, asking them to rate the importance to themselves personally of a list of attributes. Two important themes emerge at the top of Montanans’ reasons why to live in their home state:

- Family and community
- The natural beauty of Montana, the clean environment and being able to take part in outdoor activities



Montanans say family ties are very important (62%) to their decision to live in the state. But what they value in their community goes much deeper than that, to the quality of community life in Montana. Eight in ten (79%) residents say it is “very important” that “Montana is a good place to raise children.” This includes not only parents with children under 18, but the adult public at large. Low crime rates are “very important” to 70% of Montanans. Six in ten (59%) say they personally consider “the sense of community” to be “very important” in deciding to live in Montana.

A Clean Environment and Access to the Outdoors Define the Montana Way of Life

Close-knit communities can be found in towns and cities across the U.S. However, Montanans of all ages, living in towns and rural areas, east and west, richer and poorer alike, are unified by their appreciation and value of Montana's natural environment.

Eight in ten Montanans say the "clean environment" (79%) and "natural beauty" (78%) are "very important" reasons for choosing to live in Montana—an overwhelming result. Montana's natural environment is an integral part of the everyday life of many Montanans—majorities say that being able to participate in "outdoor activities, such as skiing, hiking and bicycling" (59%) is very important, as is "being able to go hunting and fishing" (55%).

2. Beauty vs. Growth: Montanans Seek the Right Mix

Residents Expect Environment and Development to Co-exist

As seen above, almost all Montanans agree that the state's natural beauty and clean environment are important reasons to live in the state. Environmental issues have a very strong salience among Montanans, and affect their attitudes toward many public policy issues. But for how many Montanans is the environment the top, driving issue and how intense are their feelings?

There are differing opinions on the extent to which this inheritance is threatened. Over two-thirds (68%) say "increasing environmental pollution" poses a serious problem for Montana's future; three in ten (31%) see it as a "very serious problem." This is in line with a December 2000 Roper Reports poll, in which three-quarters of the U.S. public said "severe air pollution" and "severe water pollution" will be "a serious problem...25 to 50 years from now." In Montana, awareness of the threat of environmental pollution appears to be more prevalent among younger Montanans. Four in ten (39%) of 18 to 34 year olds say increasing pollution may be a "very serious problem," compared to 26% of those age 60+.

Environmental protection and economic development are sometimes portrayed as incompatible goals. However, the majority of Montanans see the opportunity for these concepts to co-exist with over half (57%) of those surveyed disagreeing that "Montana residents have to choose between a stronger economy and preserving our traditional outdoors way of life"—indicating the will to find an appropriate balance between growth and environmental preservation. Within this group, one in three (33%) Montana adults "strongly disagree" that this trade-off must be made. Conversely, four in ten (41%) agree that Montana residents have to choose between a stronger economy and preserving the outdoors way of life; a fifth (19%) "strongly agree."

From the broad question about the importance of the economy and the threat of pollution, to the more focused question on the trade-offs between growth and preserving the outdoors way of life, a still more pointed question on the potential trade-off between jobs and the environment sheds more light on where Montanans stand on this difficult issue.

Overall, half (52%) of Montanans say that “creating and preserving jobs in the oil, mineral and timber industries” is the more important priority for Montana today. Nearly four in ten (38%) take the opposing view that “protecting the environment” is the greater priority.

We can also identify the percentage of Montanans who hold consistent and strong views toward environmental protection. By focusing on those who foresee a “very serious” future problem from environmental pollution and those who say the environment should be given higher priority than extractive industry jobs, 18% of the Montanan public takes the strongest stand on the issue. This appears to be a view primarily driven by attitudes, as demographics such as gender, education, occupation and region have no significant relation to it.

3. Hopes and Dreams: Making a Future in Montana

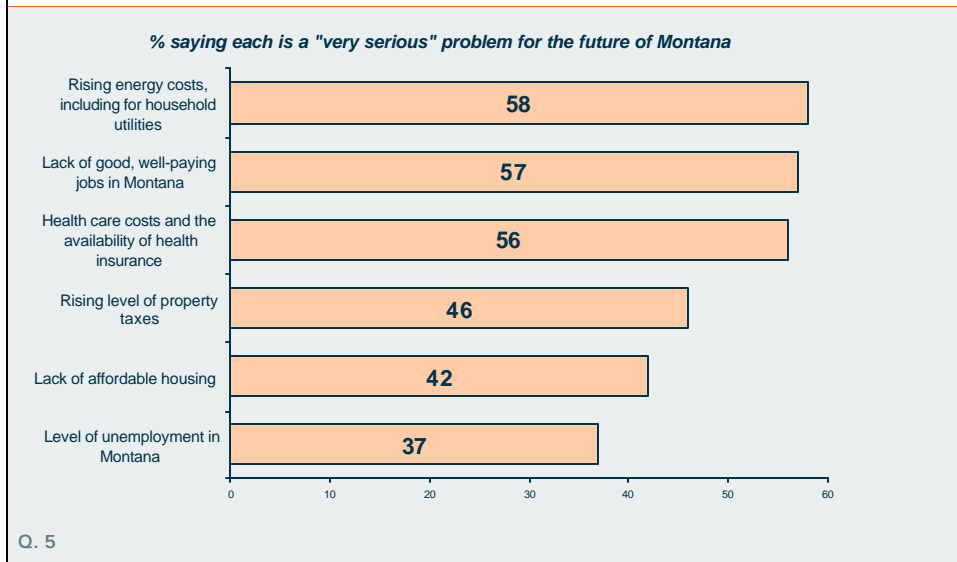
What the Future Holds: Montanans Worry about Rising Cost of Living

Compared to the key motivators of environment and family, the decision to live in Montana appears to be relatively less driven by economic factors. Half (50%) of Montana residents say the “affordable cost of living” is a “very important” factor in deciding to live in Montana, while just 41% say job opportunities are “very important.” Both measures are on the low end of the scale of all the examined factors.

While Montanans love their state for its close-knit communities and access to the great outdoors, their most serious concerns for the future of the state revolve around pocketbook issues. In short, many Montana residents worry about being able to afford to live in the state in the future.

Majorities think that rising energy costs, the lack of good, well-paying jobs and the affordability of health care will be “very serious” problems for the future of Montana. Around four in ten foresee “very serious” problems from rising property taxes, the lack of affordable housing and the level of unemployment.

Montanans' Top Worries for the Future Focus on Pocketbook Issues



Earlier, we saw how Montanans worry not only about the future supply of jobs, but also whether the jobs that are available will be well-paid. Indeed, most Montanans (92%) agree that “most of the young people who leave Montana would stay if there were more and better-paying jobs;” two-thirds (66%) agree *strongly*.

The Current State of the Economy: Fair to Poor; Households Doing Better

As seen above, there is a broad consensus among Montanans that the state’s natural beauty is one of its greatest assets and a primary reason for choosing to live in the state. Yet, as one of our discussion group participants reminded us, “You can’t eat the scenery.” A vibrant economy is essential for Montana’s future. The question that vexes many Montanans is how to attract businesses and create jobs while protecting the fragile ecological and social environments that make Montana a special place to live.

As was just shown, economic issues dominate Montanans’ concerns about the future in their state. Many appear to believe improvement is needed because of the current anemic state of the economy.

Six in ten Montanans describe the state of the economy as either “fair” (45%) or “poor” (16%). Just under four in ten say it is “good” (35%) or “excellent” (only 3%). A critical view (fair or poor) of the state of Montana’s economy is more prevalent among younger adults (66% of 18–34 year olds, vs. 51% of those over 60).

	How would you rate the overall state of the economy in Montana today?	How would you rate your own household's financial situation?
Top two box	38%	56%
Excellent	3	12
Good	35	44
Bottom two box	62%	43%
Fair	45	33
Poor	16	11
Don't know	1	1

Montanans are comparatively more positive toward the state of their own household's finances, a finding that is typical in public opinion research. Over half of Montanans rate their own household's situation as either "good" (44%) or "excellent" (12%). About four in ten call it "fair" (33%) or "poor" (11%). As is to be expected, Montanans' ratings of their household financial situation are closely tied to their household income.

Montanans who describe their own household situation as good or excellent are divided in their views of the state of the economy on Montana (48% good to excellent; 52% fair to poor). However, those who rate their own household finances unfavorably (fair to poor) are much more likely to be critical of the state of Montana's overall economy (25% good to excellent, 75% fair to poor).

Montana residents recognize the need for a healthy economy. Regardless of whether they view their own situation and the state's economy as good or bad, wide majorities are concerned about the problem of the lack of "good, well-paying jobs in Montana." More than nine in ten agree—and two-thirds "strongly agree"—that "a strong, healthy business climate is essential for the future of Montana."

A wide majority (87%; 55% "strongly") agree that the state government has a role to play, by actively working to attract business and thus more higher-paid jobs; 12% disagree.

Q. Now I am going to read you a series of statements. For each statement please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree. [IF NEEDED: Just give your best impression based on what you may have heard or read.]

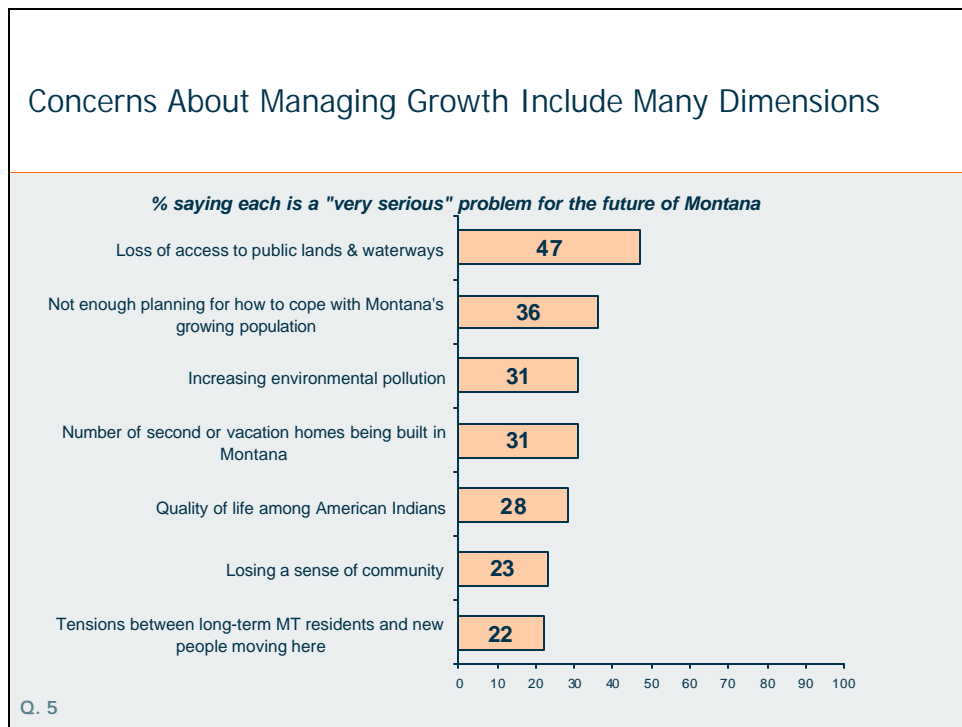
	Top two box	Strongly agree	Some-what agree	Bottom two box	Some-what disagree	Strongly disagree	Don't know
A strong, healthy business climate is essential for the future of Montana.	94%	65	29	6%	5	1	*
Montana's government should be more active in attracting businesses that will create higher paying jobs.	87%	55	32	12%	7	4	1

4. Montanans Worry about Managing Growth

The potential challenges stemming from growth do not only result from the impact of business and industry on the natural environment. Montanans also express concern about the challenges to communities and lifestyles resulting from population growth and development. Many Montanans recognize the difficulties of embracing the dynamism that migrants and new residents can bring to the economy and local communities in Montana, while preserving the essential elements that make the state such a rewarding place to live.

Montanans express a mix of opinions on the challenges that may arise from managing the physical aspects of growth. While six in ten or more foresee problems on a range of issues related to growth, Montanans tend to think these will be “somewhat serious” rather than “very serious.” For instance, three-quarters (73%) say the overall problem of insufficient planning to cope with Montana’s growing population will be a problem—but only half these (36%) think it will be a “very serious” problem. The lack of planning for growth is particularly seen as a “very serious” problem by Western Montanans (41%), as well as by those who anticipate worsening future living standards (52%).

Likewise, a majority (63%) think the specific issue of the number of vacation and second homes will be a problem—with only half viewing it as a potentially “very serious problem.” The implication is that managing growth is a problem that Montana can still control.



Rapid population growth can also stress the environment through increased pollution levels. As with construction and planning issues, a wide majority (68%) say this can be a problem, though only three in ten (31%) believe it will pose a “very serious” problem. Keep in mind that, as we said earlier, the pristine environment is one of the qualities of Montana that its residents treasure most.

One key theme running through the survey is the importance Montanans place on having access to an outdoors-oriented lifestyle. Eight in ten worry about the future loss of access to public lands and waterways; nearly half (47%) think this could be a “very serious problem.” Concern is particularly high among Western Montanans (50% “very serious”), compared to just over a third (36%) of Eastern Montanans.

What the Future Holds: The Opportunities and Challenges of Change Montanans Conflicted about Effects of New Residents on the State

On a more personal level, a majority of Montanans anticipate problems arising at an interpersonal or community level. Six in ten (62%) consider “tensions between long-term Montana residents and new people moving here” to be a problem for Montana’s future, though only one in five (22%) expect it to be a “very serious problem.”

As many think that “losing a sense of community” will become a problem in the future, but a plurality see this as “somewhat” of a problem, rather a “very serious” one. The loss of a sense of a community is more often seen as a “very serious” problem by rural residents (30%) vs. town dwellers (19%). Yet, keeping this in perspective, nearly four in ten (38%) Montanans see little or no problem in this regard, making this the least-feared item on the list.

In order to learn more about Montanans’ attitudes toward change, we designed a series of questions to tap into their basic attitudes toward the future quality of life in the state, and toward one of the most important changes happening in Montana today—the influx of new residents into the state. According to census statistics, most of the new residents in Montana are settling in the western part of the state, and mostly in or near the larger towns and cities.

We asked Montanans a pair of questions specifically intended to measure attitudes toward the impact of new people moving into the state. One question was phrased in a positive way, the other more negative. Respondents were free to say whether they agreed or disagreed, strongly or somewhat, with the statements. These statements were presented as part of a randomly ordered array of statements, in order to reduce bias from order effects.

On the positive side, six in ten (61%) agree that “Montana benefits from the different attitudes and outlooks of its newest residents”—though they are three times as likely to agree “somewhat” (47%) rather than “strongly” (15%). Just over a third (36%) disagree.

However, this positive attitude toward new residents is not universal—younger Montanans under age 50 are more likely than those over 50 to agree that Montana benefits from the newest residents’ different attitudes and outlooks (65% vs. 57%, respectively).

Q. "Montana benefits from the different attitudes and outlooks of its newest members."

	Total	Future Quality of Life will be Better (A)	Future Quality of Life will be Worse (B)	Jobs are Most Important Priority (C)	Environment is Most Important Priority (D)	New People Changing Montana for Worse (E)	New People Not Changing Montana (F)
Top two box	61%	68%^b	51%	58%	67%^c	49%	77%^e
Strongly agree	15	17 ^b	11	13	20 ^c	10	20 ^e
Somewhat agree	47	51 ^b	41	45	47	39	56 ^e
Bottom two box	36%	29%	46%^a	40%^d	30%	49%^f	20%
Somewhat disagree	21	20	25	22	19	26 ^f	15
Strongly disagree	14	9	21 ^a	18 ^d	11	23 ^f	4
Don't know	3	3	2	2	3	2	4

Note: Superscript letters denote significant differences at the 95% confidence level.

Two factors in the data play a key role in shaping favorable opinions toward new Montana residents: overall optimism and environmental attitudes. Residents who are already optimistic about the future of Montana are most favorable to newcomers. Further, those who say the environment is the most important priority in Montana are more likely to agree that Montana benefits from the diversity in attitudes of new residents.

Attitudes are more closely divided when Montanans are asked whether "the new people moving into Montana are changing things for the worse." Just over half (52%) agree; 45% disagree.

The overall sense gained from comparing these two questions is that Montanans tend to be wary of the impact of the trend of inward migration, but are more hesitant to ascribe its negative impact to individuals. Montanans who are positive about new residents have more consistent views: eight in ten of those who say new people are not changing things for the worse also agree that the state benefits from the attitudes and outlooks of its newest residents. However, Montanans who feel new residents are having a negative impact are evenly divided on the benefits gained from their attitudes and outlook.

Education clearly plays a role in how residents feel toward newcomers. Montanans with a college education are more open than others to welcoming new residents:

- College graduates (71%) are more likely than those without degrees to say Montana benefits from the outlooks and attitudes of new residents (58% among those with some college and 55% with up to a high school diploma).
- College graduates (53%) are also more likely than others to disagree that "new people moving into Montana are changing things for the worse" (42% with some college and 41% with high school education).

Residency also plays a role in attitudes toward newcomers, but the “resident” affect is more muted than the educational impact.

- People who grew up in Montana (56%) are more likely than those who moved to Montana as adults (44%) to say newcomers are changing the state for the worse.
- Rural Montanans are more likely than their urban counterparts to say the newcomers are worsening their state (58% vs. 49%, respectively, agree)—although there is no discernible difference in attitudes between residents of the eastern and western portions of the state.

One important point worth noting is that people who grew up in Montana (60%) and those who moved there as adults (65%) agree that Montana benefits from its new residents’ attitudes and outlooks; this is not a statistically significant difference. However, they do express different attitudes toward the overall impact of population inflows. Lifelong Montanans (56%) tend to say new residents are changing the state for the worse, while those who moved to the state as adults are more likely to disagree with this statement (53%).

A pronounced link also appears between attitudes toward change and the likely state of the quality of life in Montana in the future.

We asked Montanans to look ahead, and tell us whether they think the quality of life in the state will be better or worse five years from now. Fully half (53%) think the quality of life in Montana will be better in five years, but nearly four in ten (38%) believe it will be worse. One thing to keep in mind, however, is that these views are generally moderate rather than extreme, with three-quarters thinking the situation will be only “somewhat” better or worse.

Q. Five years from now, do you think the quality of life in Montana will be...

	Total	Eastern Montanans (A)	Western Montanans (B)
Top two box	53%	61%^b	52%
Much better	10	11	10
Somewhat better	44	50 ^b	42
Bottom two box	38%	30%	40%^a
Somewhat worse	31	25	33 ^a
Much worse	7	5	7
(DO NOT READ) About the same	7	8	6
Don't know	2	2	2

Note: Superscript letters denote significant differences at the 95% confidence level.

Despite the more difficult economic conditions in the eastern part of the state, Eastern Montanans tend to be more positive about the future than Western Montanans. Moreover, as shown in the table above, Montanans who are optimistic about the future quality of life in their state are also positive about the impact of new residents. However, factors such as age, income, education and region have limited or no relation to future expectations for the quality of life.

5. What Businesses Are Right for Montana?

What Makes a Good Corporate Citizen? Treating Employees Right and Being Open with the Public

Communities in Montana include not just individuals and families, but also businesses large and small. So, what types of businesses do Montanans want to operate in their towns and communities? We asked Montana residents whether each of 11 qualities helps make a business a “good corporate citizen.” Montanans’ responses can be used to identify three tiers of importance.

In the **top tier**, what really impresses Montanans is a company that “cares about its employees” and “is open and honest with the public.”

In the **second tier** are items that may be more expected of a company, including Ethics, Jobs, Products and Concern about the Community. Companies may not be rewarded for doing these things, but are punished for not doing them.

The **third tier** may have less of an impact on the public, either positively or negatively. Making profits and being a leader in its industry are likely seen as more internal concerns for the company than for the broader community, and only about half look for companies to explain their decisions fully.

College graduates and those with higher income (two subgroups with sizeable overlap) tend to have stronger views than others on all these elements.

Q. When you think of businesses that are good corporate citizens, which characteristics are most important? Rate the attribute on a scale of 1 to 10 with 1 being not important and 10 being extremely important.

	Top 3 Box Score (8-10)
Top Tier	
Cares about its employees	78%
Is open and honest with the public	76%
Middle Tier	
Has highly ethical senior management	72%
Protects jobs in Montana	72%
Goes the extra mile to ensure customer needs are met	70%
Gives back to the local communities in which it operates	69%
Offers the highest quality products and services	69%
Cares about the environment	67%
Bottom Tier	
Is a profitable company	56%
Fully explains the reasons for business decisions	50%
Is a leader in its industry	42%

This profile of a good corporate citizen is based on the Roper Corporate Reputation Scorecard™ Bellwether Company Research—a study of 30 top global advertisers among the general public. In this nationwide research, longstanding trends indicate that the attributes that typically rise to the top among the U.S. public are companies that:

- Offer the highest quality products and services
- Go the extra mile to ensure customer needs are met
- Have highly ethical senior management
- Are open and honest with the public

These findings suggest that Montanans, like Americans overall, value a company that is “open and honest,” with ethical management. However, these results indicate that Montanans are more likely to look with a critical eye on how companies operating locally treat their employees. Montanans place relatively greater importance on whether a company “cares about its employees.”

Balancing Montana’s Environmental and Developmental Goals

As we have already seen, while Montanans rate their state’s economy as good to fair and worry about whether there will be enough well-paid jobs in the future, many also believe that economic progress should not and need not come at the price of environmental degradation. Montanans’ access to areas of natural beauty appears to have given them a pronounced awareness of the potential trade-offs between economic growth and environmental protection.

As noted at the start of section 2, a solid majority—57%—disagree that Montanans have “to choose between a stronger economy and preserving our transitional outdoors way of life;” a third disagree *strongly*.

Yet four in ten (41%) nevertheless agree that Montanans “can’t have it both ways.”

Montanans most likely to “strongly disagree” that there is a necessary trade-off between growth and preserving their outdoors way of life are college graduates and those with higher income (two subgroups with sizeable overlap).

What is also interesting is what does NOT have a significant relationship with attitudes toward growth and the environment, including age, gender, region, employment status, and expectations for the future quality of life in Montana.

Tourism Seen as Positive Force for Economic Development

Tourism is one specific industry that may help Montanans to achieve their goals. Eight in ten (82%) say tourism has a “positive impact” on Montana’s local businesses and is “essential” for economic development. Fewer than one in five (17%) see tourism as a source of mostly “low paying jobs” and limited contribution to economic development. Indeed, a key theme from the research is that tourism will be key to developing Montana’s economy, and that the state’s natural resources and clean environment are the main draw for visitors.

Q. There are different opinions on the impact of tourism on Montana. Which of the following two statements is closer to your own opinion?

Tourism has a positive impact on many local businesses and is essential for Montana’s economic development.	82%
Tourism creates mostly low-paying jobs and contributes little to Montana’s economic development.	17
Don’t know	2

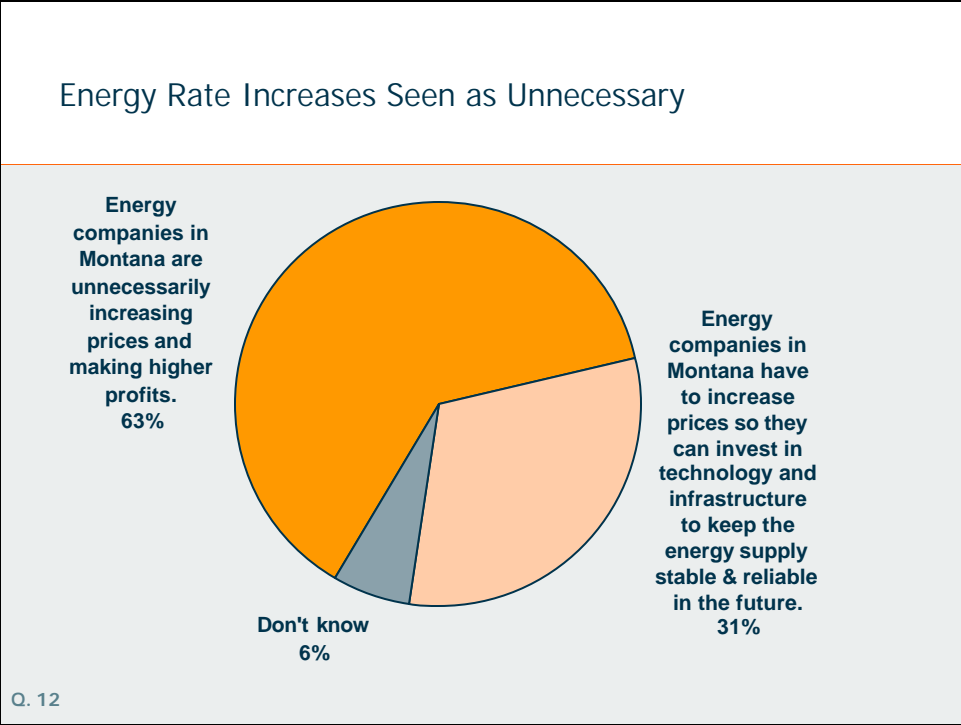
Energy Sector Seen to Aid Economic Growth

Montanans see a clear role for the energy sector in their state’s economic development. Renewable energy sources are a popular idea. Nine in ten (89%) agree that “renewable energy sources like wind farms” can help advance the dual goals of economic development and environmental protection. As many (87%) agree that energy sector investment in technology and infrastructure is “essential” for future economic development. The strongest advocates of the need for investment are Eastern Montanans, 44% of whom “strongly agree” with this idea and rural Montanans (39% “strongly agree”) vs. 37% overall.

Q. Now I am going to read you a series of statements. For each statement please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree. [IF NEEDED: Just give your best impression based on what you may have heard or read.]

	Top two box	Strongly agree	Some-what agree	Bottom two box	Some-what disagree	Strongly disagree	Don't know
Renewable energy sources like wind farms will allow Montana to develop its economy while protecting the environment.	89%	55	35	9%	6	3	2
Investing in technology and infrastructure in the energy sector is essential for Montana's economic development in the future.	87%	37	49	11%	8	3	3

While the study shows that Montanans believe that investment in the energy sector is important for their state's economic advancement, raising the needed revenue through increased prices will not be a popular path. In fact, six in ten believe that "energy companies in Montana have been unnecessarily increasing prices and making higher profits." Only half as many (31%) link price rises to energy companies' need to invest in infrastructure and technology, so as to provide a reliable supply of energy in the future.



Montanans say the cost of natural gas (56%) has risen more quickly than the cost of electricity (28%) in the past five years.

Q. From your own experience, which has increased faster in the past five years—the cost of electricity or the cost of natural gas?

Natural gas	56%
Electricity	28
(DO NOT READ: Don't have natural gas)	6
Don't know	10

Oil, Mineral and Timber Industries: Jobs Edge Out the Environment

When Montanans are asked whether “creating and preserving jobs in the oil, mineral and timber industries” or “protecting the environment” is the more important priority for Montana today, jobs win out by a five-to-four margin. Yet the narrowness of this margin indicates that Montanans tend to support a “balance” or “compromise” between these objectives.

Q. If you had to choose, which is a more important priority for Montana today?

Creating and preserving jobs in the oil, mineral and timber industries	52%
Protecting the environment	38
(DO NOT READ) Both are equally important	8
Don't know	2

Preference for jobs in the oil, mineral and timber industries is moderately more prevalent among:

- Eastern Montanans (59%)
- Rural residents (58%)
- Montanans age 50 and over (57%)
- People who are aware of new coal extraction technologies (56%)

Environmental protection is of relatively higher priority—but is still not the majority opinion—for:

- College graduates (45%)
- Western Montanans (42%)
- Montanans age 18-34 (44%)
- People who “strongly agree” that renewable energy sources will allow Montana to pursue both growth and environmental protection.

Public Opinion on Montana’s Coal Resources: Untapped

Over half (57%) of the public in Montana has heard either “a fair amount” or “a great deal” about their state having large coal reserves. About four in ten (43%) has heard “not very much” or “nothing at all” about it. Awareness of the coal reserves is higher among:

- People age 50+ (71%)
- People with higher household income (69% of those with \$50K+)
- College graduates (67%)
- Men (64%)
- Eastern Montanans (63%)

	<i>How much have you heard or read about Montana having large coal reserves?</i>	<i>And how much have you heard or read about new technologies that can reduce the environmental impact of coal extraction while providing valuable gas and liquid fuels?</i>
Top two box	57%	45%
A great deal	25	12
A fair amount	32	33
Bottom two box	43%	55%
Not very much	30	39
Nothing at all	13	16
Don't know	*	*

On the specific issue of coal extraction technologies, awareness is not quite as widespread. That said, just under half (45%) has heard at least a fair amount about new coal extraction technologies that reduce the environmental impact of the process; 55% has heard little or nothing.

Similar to reported familiarity with Montana’s coal reserves, awareness of new coal extraction technologies is more prevalent among:

- Men (55%)
- People with incomes of \$50K+ (55%)
- Those age 50+ (53%)
- Eastern Montanans (52%)

These figures indicate that while the issue of coal extraction is on Montanans’ radar, at least faintly, opinions have not formed fully on the issues. Asked who should take primary responsibility for developing Montana’s coal reserves, a plurality (44%) say they have not yet heard enough to say. Among the rest, opinion is divided on whether public or private interests should be primarily responsible. About a quarter (28%) say the state government should be in charge, while as many (24%) say private companies should be.

Q. In your opinion, who should be primarily responsible for the development of Montana’s coal reserves: the Montana state government or private companies, or haven’t you heard enough to say?

Montana state government	28%
Private companies	24
Haven’t heard enough to say	44
(DO NOT READ) Other	4
Don’t know	-

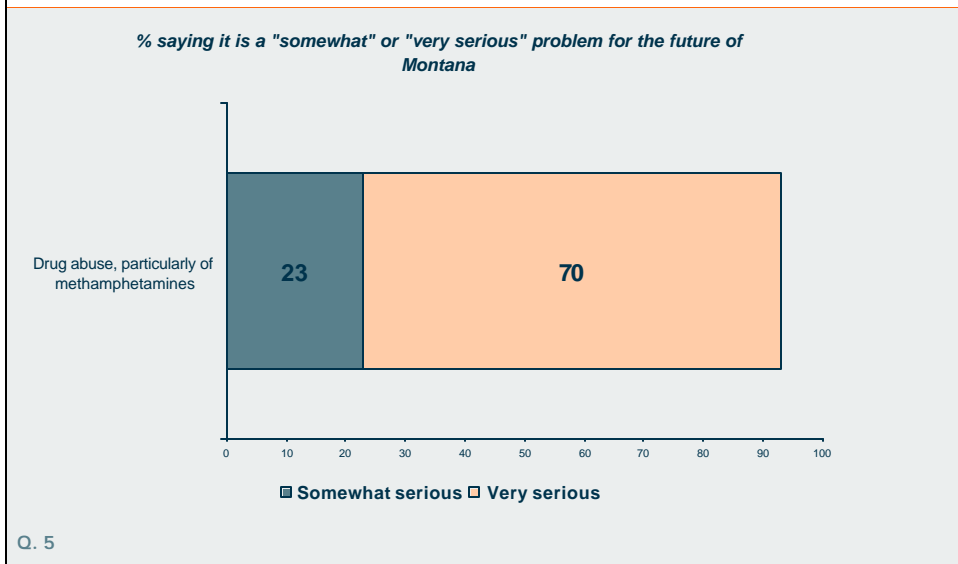
6. Social Concerns: Drug Abuse a Big Concern for Montanans

Beyond the public’s concerns about the future economic situation in their state, most (93%) say that drug abuse, particularly of methamphetamines, will be a serious problem for Montana’s future; seven in ten say it will be “very serious.” Wide majorities of Montanans from all walks of life think drug abuse will be a somewhat or very serious problem. There is a slightly greater proportion who see drug abuse as a “very serious” future problem among:

- People over 50 (74%)
- People with income under \$50K (74%)
- Rural residents (75%)

In a nationally representative 2004 Roper Reports™ survey, drug abuse was cited by only 21% of Americans as an area they are personally most concerned about. While these questions are not directly comparable, the level of concern about methamphetamines appears much higher among Montana residents.

Drug Abuse Tops List of Concerns Among Montanans



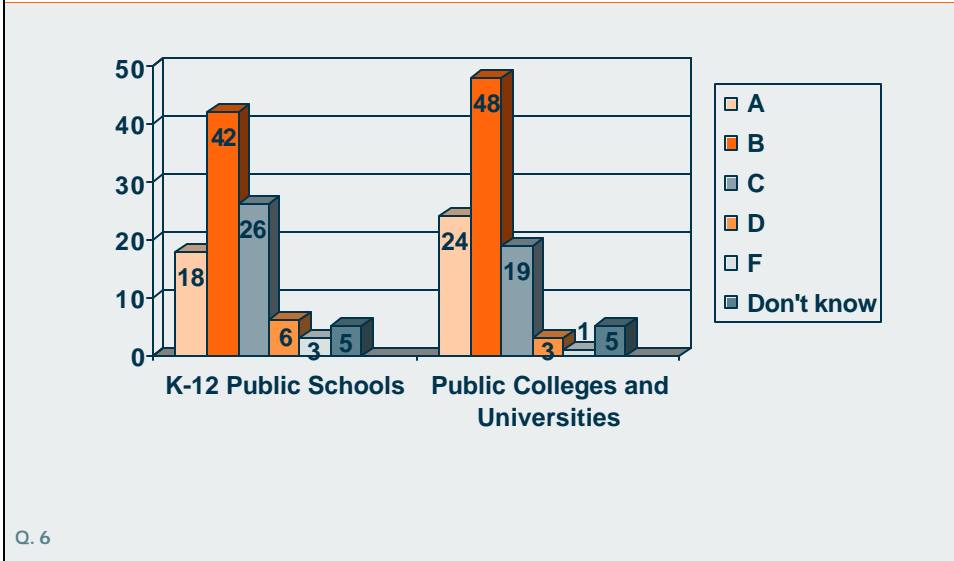
7. Montanans Give Their Public Education System a “B”

An essential part of preparing for the future is educating Montana’s children and young adults. Overall, Montana residents are positive about the quality of education received in both the kindergarten through twelfth grade public school system, as well as in Montana’s public colleges and universities.

Montana’s children receive a solid start to their education, according to a majority of the state’s residents. Six in ten Montanans give public school education in the state a grade of “B” or better. A quarter give the quality of elementary and high school education a “C”, and less than one in ten give it a substandard rating of “D” (3%) or a failing “F” (3%). It’s not only parents with kids under 18 who feel this way—this view is shared across the adult public population.

Higher education in Montana also receives good ratings, with seven in ten giving the state’s public colleges and universities a “B” or better for quality. Older residents tend to view the quality of Montana’s colleges more favorably. For instance, three in ten (31%) of those over age 60 give higher education an “A”—twice the number of 35-49 year olds (16%) who do so.

Montanans Give Their Public Education System a "B"



Although Montanans hold positive views of primary and secondary education systems, as well as higher education in the state, they do acknowledge that there are challenges. Most of these perceived challenges center on funding.

Among the challenges facing the K-12 system, eight in ten Montanans express concern about the level of funding for public schools; nearly half (46%) say it is a "very serious problem." Concern about funding levels far outstrips concerns about overcrowding or falling enrollment numbers.

Q. Now I am going to read you a list of issues affecting education in Montana. For each, tell me whether you personally consider it a very serious problem, somewhat serious problem, not very serious problem or not a problem at all for education in Montana.

	Top two box	Very serious	Some-what serious	Bottom two box	Not very serious	Not a problem at all	Don't know
d. The level of funding for Montana's K through 12 public schools	80%	46	33	16%	10	7	4
b. Overcrowding in public schools	63%	27	36	34%	20	15	3
c. Declining number of children in grades K through 12	51%	17	33	43%	26	18	6

Shifting demographics and school finances can stress school systems in various ways. Six in ten (63%) say overcrowding in public schools is a somewhat or very serious problem; this is more of a concern for urban (67%) than rural (56%) Montanans. Conversely, a declining number of children in grades K through 12 is recognized as a problem by half (51%) of Montanans: rural residents (61%) are more attuned this issue than urban dwellers (46%).

Finances are also a concern for Montana's state higher education system. Although the quality is generally seen as above average, eight in ten (82%) adults say that rising tuition costs in public universities is a serious problem; nearly half (46%) say it is "very serious." Just 14% say it is "not very serious" or "not a problem at all."

Q. Now I am going to read you a list of issues affecting education in Montana. For each, tell me whether you personally consider it a very serious problem, somewhat serious problem, not very serious problem or not a problem at all for education in Montana.

	Top two box	Very serious	Some-what serious	Bottom two box	Not very serious	Not a problem at all	Don't know
Rising tuition costs at Montana's public universities	82%	46	36	14%	8	5	4

Addendum: Montana Quality-of-Life Survey

Text of Questions Asked and the Responses
 Conducted by Roper Public Affairs
 Sample size =1,013 Response Rate = 23%
 All numbers posted in percents * = less than 0.5%

1. Overall, do you think things in Montana today are going in the right direction, or are they off on the wrong track?

Right direction	63
Wrong track	26
Don't know	11

2. All things considered, how do you rate Montana as a place to live? Do you think Montana is ...

One of the best states in the country to live in	49
Above average	28
Average	16
Below average	4
One of the worst states in the country to live in	1
Don't know	1

3. I would like to ask you about your own reasons for living in Montana today. For each item, tell me how important it is for you personally in deciding to live in Montana. Is it very important, somewhat important, not very important or not at all important?

	Very important	Somewhat important	Not very important	Not at all important	Don't know
a. Your family is in Montana	62	19	8	10	1
b. Montana's natural beauty	78	18	2	1	-
c. Montana is a good place to raise children	79	14	2	3	2
d. The sense of community	59	31	6	2	1
e. Low crime rates	70	24	4	1	1
f. The clean environment	79	17	2	1	*
g. Outdoor recreation, such as skiing, hiking and bicycling	59	27	8	5	1
h. Being able to go hunting and fishing	55	20	14	10	*
i. Affordable cost of living	50	36	8	4	1
j. Job opportunities	41	32	16	9	2
k. Not overcrowded with people	74	19	4	3	*

4. Five years from now, do you think the quality of life in Montana will be?

Much better	10
Somewhat better	44
Somewhat worse	31
Much worse	7
(DO NOT READ) About the same	7
Don't know	2

5. Now I am going to read you a list of issues that some people think may affect the future of Montana. For each, tell me whether you personally consider it a very serious problem, somewhat serious problem, not very serious problem or not a problem at all for the future of Montana.

[N=978]

	Very serious	Somewhat serious	Not very serious	Not a problem at all	Don't know
a. Lack of affordable housing	42	36	14	6	1
b. Losing a sense of community	23	38	24	13	2
c. Not enough planning for how to cope with Montana's growing population	36	37	16	9	2
d. Increasing environmental pollution	31	38	21	9	2
e. Drug abuse, particularly of methamphetamines	70	23	3	2	2
f. Lack of good, well-paying jobs in Montana	57	33	7	3	*
g. Rising energy costs, including for household utilities	58	31	6	3	1
h. The number of second or vacation homes being built in Montana	31	32	20	15	2
i. Tensions between long-term Montana residents and new people moving here	22	40	23	14	2
j. Quality of life among American Indians	28	40	13	10	8
k. Loss of access to public lands and waterways	47	32	12	6	3
l. The rising level of property taxes	46	39	9	4	1
m. The level of unemployment in Montana	37	41	13	6	3
n. Health care costs and the availability of health insurance	56	29	9	4	2

Now I have a few questions about the education system in Montana today.

6. How would you rate the quality of public school education in Montana today, for kids in kindergarten through 12th grade? If you were to give it a grade like on a report card, would you give it an:

A	18
B	42
C	26
D	6
F	3
(DO NOT READ) Other	*
Don't know	5

7. And how would you rate the quality of higher education, including colleges and universities, in Montana today? If you were to give it a grade like on a report card, would you give it an:

A	24
B	48
C	19
D	3
F	1
(DO NOT READ) Other	*
Don't know	5

8. Now I am going to read you a list of issues affecting education in Montana. For each, tell me whether you personally consider it a very serious problem, somewhat serious problem, not very serious problem or not a problem at all for education in Montana.

	Very serious	Somewhat serious	Not very serious	Not a problem at all	Don't know
a. Rising tuition costs at Montana's public universities	46	36	8	5	4
b. Overcrowding in public schools	27	36	20	15	3
c. Declining number of children in grades K through 12	17	33	26	18	6
d. The level of funding for Montana's K through 12 public schools	46	33	10	7	4

Now I would like to ask you about the economic situation in Montana.

9. How would you rate the overall state of the economy in Montana today?

Excellent	3
Good	35
Fair	45
Poor	16
Don't know	1

10. How would you rate your own household's financial situation?

Excellent	12
Good	44
Fair	33
Poor	11
Don't know	1

11. If you had to choose, which is a more important priority for Montana today?

Creating and preserving jobs in the oil, mineral and timber industries	52
Protecting the environment	38
(DO NOT READ) Both are equally important	8
Don't know	2

12. Which of the following two statements is closer to your own opinion:

Energy companies in Montana are unnecessarily increasing prices and making higher profits.	63
Energy companies in Montana have to increase prices so they can invest in technology and infrastructure to keep the energy supply stable and reliable in the future.	31
Don't know	6

13. There are different opinions on the impact of tourism on Montana. Which of the following two statements is closer to your own opinion:

[RANDOMIZE]

Tourism creates mostly low-paying jobs and contributes little to Montana's economic development.	17
Tourism has a positive impact on many local businesses and is essential for Montana's economic development.	82
Don't know	2

- 14 Now I am going to read you a series of statements. For each statement please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree.

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Don't know
Montana benefits from the different attitudes and outlooks of its newest residents.	15	47	21	14	3
The new people moving into Montana are changing things for the worse.	25	27	30	16	3
A strong, healthy business climate is essential for the future of Montana.	65	29	5	1	*
Renewable energy sources like wind farms will allow Montana to develop its economy while protecting the environment.	55	35	6	3	2
Montana residents have to choose between a stronger economy and preserving our traditional outdoors way of life—we can't have it both ways.	19	23	24	33	1
Most of the young people who leave Montana would stay if there were more and better-paying jobs.	66	26	5	2	1
Montana's government should be more active in attracting businesses that will create higher-paying jobs.	55	32	7	4	1
Investing in technology and infrastructure in the energy sector is essential for Montana's economic development in the future.	37	49	8	3	3

15. When you think of businesses that are good corporate citizens, which characteristics are most important? Rate the attribute on a scale of 1 to 10 with 1 being not important and 10 being extremely important.

	10	9	8	7	6	5	4	3	2	1	Don't know
Is a leader in its industry	14	7	21	15	9	19	5	3	2	3	2
Gives back to the local communities in which it operates	38	13	18	11	6	7	2	1	1	1	1
Cares about the environment	39	12	16	10	7	9	2	1	1	2	1
Goes the extra mile to ensure customer needs are met	38	12	20	11	6	7	2	1	1	1	1
Is a profitable company	22	11	23	14	9	12	2	2	1	2	2
Is open and honest with the public	51	11	14	8	3	7	2	2	1	2	1
Has highly ethical senior management	50	11	11	8	4	8	2	2	1	2	2
Offers the highest quality products and services	34	13	22	12	6	8	2	1	*	1	1
Cares about its employees	50	14	14	7	2	6	2	1	1	1	1
Fully explains the reasons for business decisions	23	9	19	15	7	16	4	3	1	2	2
Protects jobs in Montana	43	12	16	8	6	7	2	2	1	2	1

16. From your own experience, which has increased faster in the past five years—the cost of electricity or the cost of natural gas?

Electricity	28%
Natural gas	56
(DO NOT READ: Don't have natural gas)	6
Don't know	10

17. How much have you heard or read about Montana having large coal reserves?

A great deal	25
A fair amount	32
Not very much	30
Nothing at all	13
Don't know	*

18. And how much have you heard or read about new technologies that can reduce the environmental impact of coal extraction while providing valuable gas and liquid fuels?

A great deal	12
A fair amount	33
Not very much	39
Nothing at all	16
Don't know	*

19. In your opinion, who should be primarily responsible for the development of Montana's coal reserves: the Montana state government or private companies, or haven't you heard enough to say?

Montana state government	28
Private companies	24
Haven't heard enough to say	44
(DO NOT READ) Other	4
Don't know	-

DEMOGRAPHICS

D1 Did you grow up in Montana or did you move to Montana as an adult?

Grew up in Montana	64
Moved there	36

D2 How many years have you lived in Montana?

[BASE: MOVED TO MONTANA IN D1. N=387]

Less than one year	4
1-9 years	37
10-19 years	22
20-29 years	15
30-39 years	13
40-49 years	5
50 years or more	3
Don't know	-
Refused	*

D3 Where is your primary residence – in Montana or another state?

Montana	98
Another state	2

D4 On average, how many months in each year do you spend in Montana?

[BASE: PRIMARY RESIDENT IN ANOTHER STATE IN D3. N=22]

Less than one month	13
5 months	4
6 months	13
10 months	5
11 months	5
12 months	58
Don't know	-
Refused	4

D5 What is your zip code?

D6 In what year were you born?

18 to 24	13
25 to 34	15
35 to 49	31
50 to 64	22
65 and older	18
Refused	1

D7 What is the highest level of education, or grade in school, that you completed?

Less than high school graduate (0-11th grade)	6
High school graduate (12th grade)	28
Some college (1-3 years)	25
Trade/Technical/Vocational training	5
College graduate (4 years)	24
Postgraduate work/Postgraduate degree (5+ years)	12
Don't know	*
Refused	*

D8 Are you currently employed full-time, part-time, or are you not currently employed?

Yes, full time	56
Yes, part time	12
No, not employed	31
Don't know	*
Refused	*

D9 Which one of the following best describes your current job?

[BASE: EMPLOYED FULL OR PART TIME IN D8. N=682]

Professional	27
Senior executive or manager	9
Clerical or administrative	9
Sales or services	13
A skilled trade or technical occupation	16
Blue-collar work or laborer	8
Farming or ranching	6
(Volunteered) Other	11
Refused	*

D10 Are you:

[BASE: NOT EMPLOYED IN D7. N=326]

A homemaker	20
A full or part-time student	3
Retired	57
Unemployed and looking for work	8
Something else	12
Don't know	*
Refused	*

D11 How many children under the age of 18 live in your household?

None	60
1	16
2	14
3	5
4 or more	4
Refused	*

D12 Do you personally have any children currently attending college or university?

Yes	13
No	87
Refused	*

D13 Do you own or rent your home?

Own	74
Rent	24
Refused	2

D14 Do you have access to the Internet, either at work, home, or someplace else?

Yes	84
No	16
Refused	*

D15 What do you consider to be your race or ethnicity—are you:

White	90
American Indian or Alaska Native	5
African American or Black	*
Asian American	1
Hispanic	1
Something else	2
Don't know	*
Refused	1

D16 Do consider yourself an Eastern or Western Montanan?

Eastern	29
Western	66
Don't know	5

D17 As I read you some groups of incomes, please stop me when I reach the group that includes the total annual income for all members of your household combined. (READ LIST)

Under 20 thousand dollars a year	15
Between 20 and 30 thousand	12
Between 30 and 40 thousand	14
Between 40 and 50 thousand	15
Between 50 and 60 thousand	11
Between 60 and 75 thousand	8
Between 75 and 100 thousand	9
100 thousand or more	8
Don't know	2
Refused	6

D18 Gender

Male	49
Female	51

METHODOLOGY

The findings presented are the results of a telephone survey conducted December 1 – 14, 2005 by Roper Public Affairs and Media, a part of GfK NOP. Interviews were conducted among a statewide representative sample of 1,013 adults age 18+ in Montana. Data were weighted using U.S. Census data to accurately represent the population of adult Montana residents. The margin of error for the total sample is +/- 3 percentage points at the 95% confidence level. The margin of error for subgroups is higher.