

Council of State Chambers



January 2016

Who We Talked To

Your most important audience...

- 1000 registered voters, engaged in news and politics
- C-Level execs (73% were an owner or CEO)
- 41% had 100-499 employees, 19% had 1,000 or more
- 49% annual revenue between \$50m-\$499m, 10% \$500m or more

State Breakdown

South: AL, AR, FL, GA, VA, KY, LA, MS, NC, OK
SC, TN, TX, WV

East: CT, DC, DE, MD, MA, ME, NH, NJ, NY, PA,
VT, RI

Midwest: IA, IL, IN, KS, MI, MN, MO, ND, NE, OH,
SD, WI

West: AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR,
UT, WA, WY

250 responses per region; every state represented; weighted w/in regions

The Top Takeaways

1. They love you: State Chambers provide **valuable leadership** that help businesses succeed
2. What they want most: **“OPPORTUNITY.”**
Networking, partnerships, growth, advocacy
3. Their priorities: **Economy and security.** Social issues finished **dead last.**
4. Your mission: **“Create economic opportunity and good-paying jobs for everyone”**
5. Tax **incentives** and a **simple tax code** mean a friendly business climate (especially in the Midwest)

The Top Takeaways

6. Lead on education – including “**career-oriented job training**”
7. They oppose gov’t “**controlling and mandating**” businesses but they **overwhelmingly support key mandates**

CMD:
FRANK LUNTZ IS CALLED
THE GOP “WORD DOCTOR.”
HAVE YOU HEARD THESE
PHRASES OR CLAIMS USED
BY POLITICIANS?

8. Best **alternative** to raising the minimum wage:
Expanding the EITC (“Working Family Credit”)
9. Policy arguments **fail** – **personal** arguments **prevail**.
10. **Extreme, partisan rhetoric will turn off** a lot of people, especially independents

21 Words for the 21st Century

| | |
|---|------------------------------------|
| A Healthy Economy | Opportunity |
| Leadership | Believe in Better |
| Real, Genuine Results | A Fair Wage |
| Hardworking Taxpayers | Work Hard/Play by the Rules |
| Fulfilling Careers | Good Benefits |
| Job Training & Resources | Entry-Level Jobs |
| Working Family Credit | People are Struggling |
| Common Sense | Imagine |
| A More Efficient, Effective Approach | Respect |
| Accountable | Personal Responsibility |
| Opportunities for All Americans Everywhere | |

Their Feelings on the Chamber



CMD:
This is the U.S. Chamber of Commerce in Washington, DC. It is a non-profit that pays its leader, Tom Donohue, more than \$5 million in compensation a year.

Off-the-Charts Favorability of their State Chambers

Generally speaking, do you have a favorable or unfavorable view of your state Chamber of Commerce?

| Total | |
|-------|-----------------------------------|
| 82% | Favorable (Net) |
| 22% | Extremely favorable |
| 37% | Very Favorable |
| 23% | Somewhat favorable |
| 14% | Neither favorable nor unfavorable |
| 3% | Somewhat unfavorable |
| 1% | Very unfavorable |
| 0% | Extremely unfavorable |
| 4% | Unfavorable (Net) |

Networking, Solutions, Information

What is the most useful aspect to being, or potentially being, a member of your state's Chamber of Commerce?

| Total | |
|-------|---|
| 30% | Networking connections that could help my business |
| 29% | Business development tips and strategies |
| 21% | Legislative tracking on bills that could affect my business |
| 20% | Opportunities to market my business in Chamber publications |
| 20% | Best practices from other companies in my industry |
| 19% | Advocacy for pro-business policies |
| 19% | Group insurance coverage for my business |
| 17% | Sample contracts and policy documents |
| 13% | Salary survey information |
| 12% | Discounts on services for my business |

Looking For Opportunities

*What do you most look for your
state Chamber of Commerce to provide?*

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|------------------------|
| 31% | 40% | 30% | 34% | 19% | Opportunities |
| 29% | 23% | 28% | 29% | 33% | Leadership |
| 27% | 23% | 27% | 30% | 26% | Information [COSC] |
| 26% | 31% | 26% | 16% | 30% | Benefits |
| 24% | 20% | 22% | 31% | 24% | Connections |
| 18% | 15% | 26% | 9% | 23% | Common-sense solutions |
| 17% | 21% | 17% | 16% | 15% | Guidance |
| 16% | 16% | 17% | 16% | 16% | Advocacy |
| 13% | 10% | 8% | 19% | 14% | Insight [COSC] |

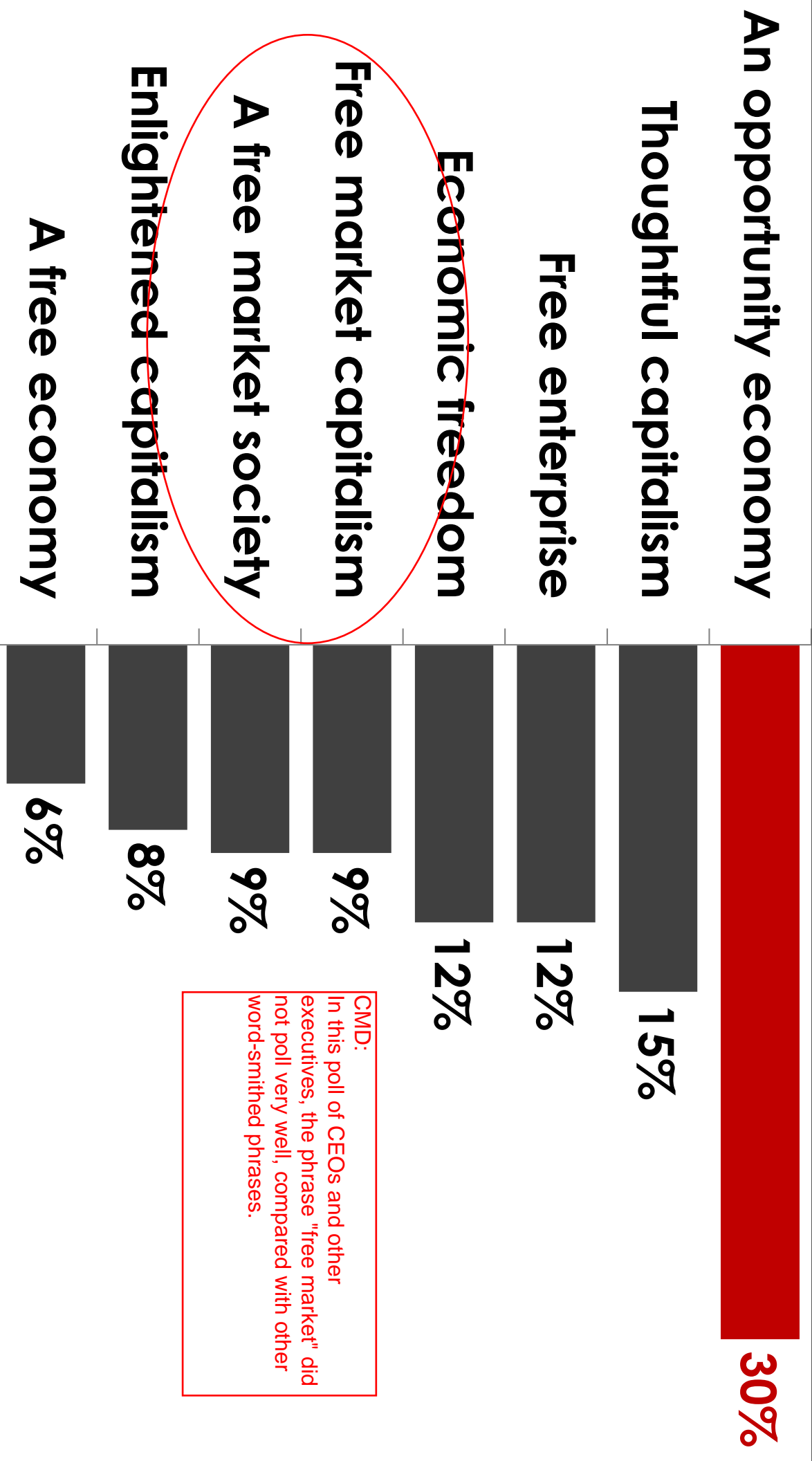
We Are Still The Land Of



“Opportunity”

An Opportunity Economy”

Which of the following will create the greatest wealth for the greatest number of people?



Real Jobs. Real Opportunities.



Words to Use...

Americans are really struggling. Instead of pointing fingers and playing class politics, let's focus on common-sense solutions that will create real jobs and real opportunities for all Americans everywhere. *[LG]*

Total: 65% **GOP: 70%**
Swing: 70% **DEM: 56%**



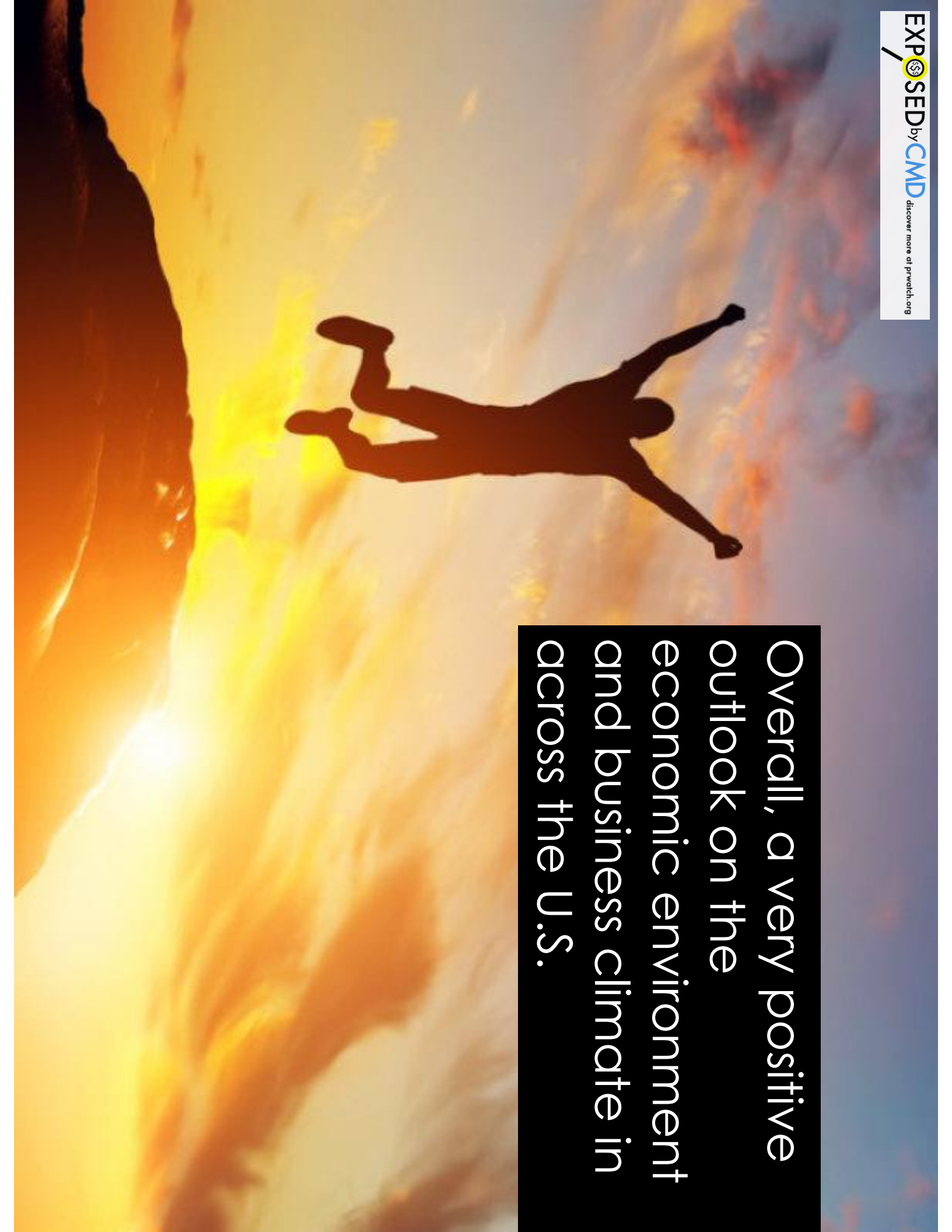
...Words to Lose

No one who works an honest job in America should have to live in poverty. People who grow our food especially should not need to be on food stamps just to feed their own families.

CMD:
"LG" = LuntzGlobal

--*Hillary Clinton*

Total: 35% **GOP: 30%**
Swing: 30% **DEM: 44%**

A silhouette of a person jumping over a bright, orange and yellow sunset sky. The person is in mid-air, with arms and legs spread wide. The background is a dramatic sky with clouds, transitioning from a bright yellow-orange near the horizon to a darker blue at the top.

Overall, a very positive
outlook on the
economic environment
and business climate in
across the U.S.

Overall Economy Has Improved

Over the last 4 years, has the economy in your state...

Total

CMD: President Obama was re-elected in 2012, almost four years ago.

80%

Improved (Net)

17%

Greatly improved

39%

Somewhat improved

25%

Slightly improved

11%

Neither improved nor declined

6%

Slightly declined

1%

Somewhat declined

1%

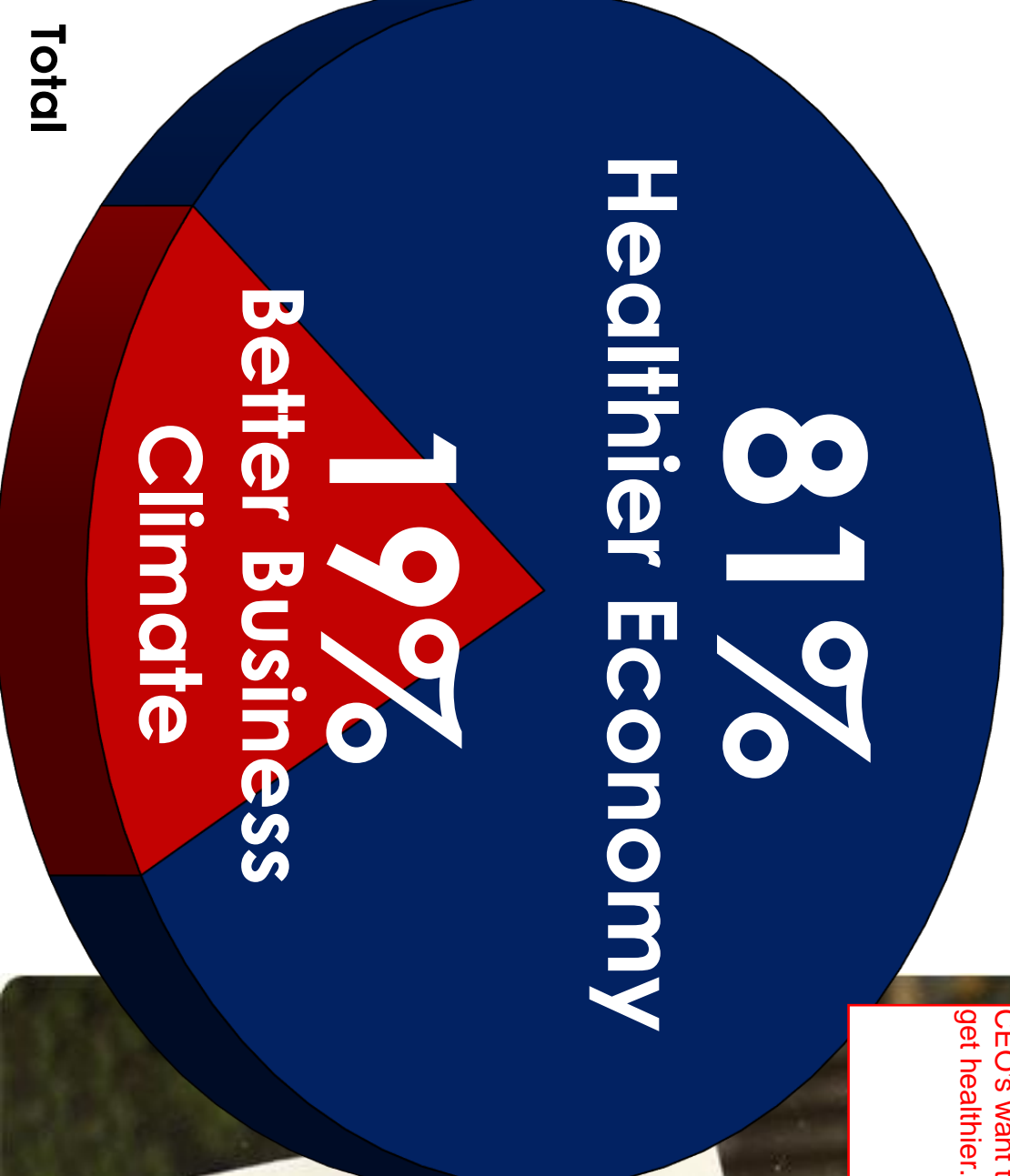
Greatly declined

8%

Declined (Net)

A Healthier Economy

What is MORE important for our economy right now?



CMD:
CEO's want the economy to
get healthier...

**OPEN
FOR BUSINESS**

What is Personally Important to Business Leaders



Economic Issues Are Most Important

Guns Make Social Issues Important For The West

All of these issues may be important, but when it comes to where a politician stands, which issue is the MOST important to you?

| Total | South | East | Midwest | West | |
|-------|-------|------|---------|------|---|
| 56% | 63% | 56% | 57% | 48% | Economic issues, like creating jobs and keeping taxes affordable |
| 48% | 47% | 47% | 56% | 43% | National security issues, like defeating terrorism and making America safe and secure |
| 34% | 32% | 35% | 43% | 28% | Personal issues, like healthcare, education, and childcare |
| 33% | 31% | 34% | 26% | 41% | Government issues, like making Washington and state governments more efficient, effective and accountable |
| 29% | 27% | 28% | 18% | 41% | Social issues, like gay marriage, abortion and guns |

Opportunity & Jobs for Everyone

You said **economic issues** are most important. Which of the following economic issues do you care about the most?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|--|
| 41% | 47% | 34% | 33% | 49% | Creating economic <u>opportunity</u> and good-paying jobs for everyone |
| 29% | 28% | 25% | 33% | 31% | Keeping the cost of living and inflation down |
| 25% | 24% | 24% | 27% | 23% | Keeping taxes affordable |
| 18% | 16% | 19% | 17% | 23% | Balancing my state's budget |
| 17% | 15% | 18% | 26% | 11% | Raising the minimum wage |
| 16% | 18% | 16% | 24% | 6% | Reducing income inequality |
| 16% | 17% | 18% | 13% | 17% | Reducing regulations on small businesses |
| 14% | 15% | 17% | 10% | 14% | Fighting poverty |
| 12% | 14% | 16% | 6% | 14% | Increasing take-home pay |
| 11% | 7% | 13% | 12% | 13% | Reducing the deficit and addressing the national debt |

CMD: Some national political figures claim this is most important....

Affordable Healthcare is Top of Mind

You said **personal issues** are most important. Which of the following personal issues do you care about the most?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|---|
| 27% | 20% | 29% | 36% | 17% | Access to affordable healthcare |
| 15% | 23% | 10% | 14% | 13% | Improving public education |
| 14% | 14% | 9% | 20% | 7% | Improving children's health |
| 10% | 5% | 20% | 6% | 12% | Reforming welfare and dependency |
| 10% | 14% | 6% | 7% | 17% | Better roads, highways and transportation |
| 9% | 8% | 9% | 2% | 20% | Making college more affordable |
| 7% | 10% | 5% | 9% | 5% | Universal childcare |
| 6% | 6% | 6% | 5% | 6% | Paid maternity/parental leave |
| 2% | 0% | 6% | 2% | 2% | Ending gender discrimination |

Efficiency and Effectiveness in Gov't

You said **government issues** are most important. Which of the following personal issues do you care about the most?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|---|
| 27% | 26% | 39% | 29% | 18% | Making government more efficient and effective |
| 24% | 26% | 18% | 26% | 25% | Ending corruption |
| 15% | 7% | 20% | 21% | 13% | Stopping the power of special interest groups |
| 12% | 8% | 4% | 10% | 24% | Holding government accountable |
| 12% | 19% | 10% | 7% | 12% | Eliminating government waste |
| 5% | 10% | 5% | 3% | 4% | Eliminating unnecessary or duplicative programs |
| 4% | 4% | 4% | 5% | 3% | Reining in bureaucrats |

Crime Is Most Important Social Issue

The West Cares About Guns

You said **social issues** are most important. Which of the following social issues do you care about the most?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|--|
| 36% | 44% | 39% | 37% | 25% | Crime/keeping our streets safe |
| 27% | 19% | 23% | 33% | 33% | Gun rights and gun control |
| 26% | 22% | 27% | 31% | 23% | Gun violence |
| 25% | 22% | 30% | 23% | 27% | The environment |
| 21% | 23% | 27% | 19% | 15% | Racial equality and improving race relations |
| 20% | 19% | 17% | 21% | 23% | Reforming the criminal justice system |
| 11% | 12% | 10% | 14% | 10% | Drug legalization |
| 9% | 9% | 8% | 12% | 8% | Providing meaningful help for the mentally ill |
| 8% | 12% | 7% | 3% | 12% | Same-sex marriage and LGBT rights |
| 8% | 11% | 8% | 5% | 9% | Religious freedom |
| 8% | 7% | 5% | 4% | 14% | Abortion |

What They Want As Business Leaders



Economic Issues Split By Region

Which of the following issues do you care about the most?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|--|
| 30% | 41% | 20% | 20% | 39% | Making the economic climate more friendly towards businesses |
| 25% | 23% | 24% | 26% | 25% | Providing better tax incentives for small businesses |
| 24% | 19% | 29% | 29% | 19% | Making the tax system more fair |
| 23% | 22% | 27% | 16% | 26% | Growing the economy through job creation |
| 21% | 22% | 23% | 19% | 23% | Attracting more businesses and jobs to your state |
| 21% | 17% | 18% | 35% | 9% | Simplifying the tax code |
| 19% | 26% | 12% | 14% | 25% | Making the government more accountable to taxpayers |
| 15% | 10% | 23% | 13% | 14% | Addressing income inequality |
| 14% | 10% | 13% | 21% | 12% | Punishing businesses that move jobs overseas to dodge taxes |
| 9% | 11% | 11% | 7% | 8% | Ensuring the wealthy pay their fair share |

Tax Code: All Agree

Fairer, Simpler & Straight-Forward for All

How should Congress address the tax code next year?

| Total | DEM | Swing | GOP | Key | |
|-------|-----|-------|-----|-----|--|
| 75% | 76% | 72% | 78% | 72% | Make the tax code fairer, simpler, and more straight-forward |
| 20% | 21% | 18% | 21% | 22% | Lowering taxes |
| 5% | 4% | 10% | 1% | 5% | Increasing taxes and government revenue |

Who should they make taxes simpler and fairer for?

| Total | DEM | Swing | GOP | Key | |
|-------|-----|-------|-----|-----|-------------|
| 68% | 48% | 73% | 85% | 71% | Both |
| 28% | 47% | 25% | 10% | 26% | Individuals |
| 4% | 5% | 2% | 4% | 3% | Businesses |

Training A Priority

Which of the following do you believe should be your state's highest priority? (Top 4 Responses)

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|---|
| 18% | 22% | 16% | 20% | 12% | Prepare every student for college, career, and life |
| 16% | 14% | 15% | 8% | 33% | Develop a long-term strategy to ensure we have a strong community college and trade school system |
| 14% | 7% | 9% | 25% | 13% | Expand personalized, customized worker training programs that matches available workers to available jobs |
| 13% | 12% | 15% | 14% | 11% | Expanding career-oriented job training programs for more skilled trades positions |



Words To Use

CMD:

Several national and state politicians, like Sen. Marco Rubio, have been using the Luntz lingo....

Career-oriented job training



Words To Lose

Vocational schools

Trade schools

Technical training

Mandates: Wages, Paid Leave, and Predictive Scheduling



100 Many State Mandates On Business

Do you think that there are _____ state government employer mandates related to business in your state?

| | |
|-------|---------------------|
| Total | |
| 53% | TOO MANY (Net) |
| 14% | <i>Far too many</i> |
| 39% | <i>Too many</i> |
| 40% | <i>Just enough</i> |
| 6% | <i>Not enough</i> |
| 0% | <i>Far too few</i> |
| 7% | TOO FEW (Net) |

They Oppose Government Controlling Business Practices

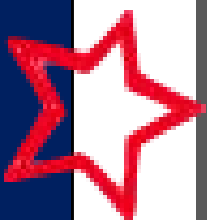
What would you oppose most?
Government ____ companies' business practices?

| Total | South | East | Midwest | West | |
|-------|-------|------|---------|------|---|
| 45% | 50% | 45% | 46% | 39% | Controlling |
| 31% | 24% | 33% | 27% | 45% | Mandating |
| 27% | 30% | 33% | 23% | 22% | Dictating |
| 25% | 26% | 36% | 18% | 24% | Regulating |
| 23% | 17% | 16% | 35% | 17% | Penalizing |
| 21% | 18% | 13% | 28% | 23% | Setting |
| 15% | 20% | 16% | 14% | 11% | Punishing [COSC] |
| 13% | 15% | 9% | 10% | 18% | Shaming [COSC] |
| | | | | | <div> <div>CMD:</div> <div>"COSC" = "Council of State Chambers" (their word-smithing to be tested)</div> </div> |

BUT...

They Support Increasing The Minimum Wage

Do you support or oppose an increase
to your state's minimum wage?



| Total | |
|-------|-------------------------|
| 80% | SUPPORT (Net) |
| 26% | <i>Totally Support</i> |
| 34% | <i>Mostly support</i> |
| 19% | <i>Somewhat support</i> |
| 12% | <i>Neutral</i> |
| 3% | <i>Somewhat oppose</i> |
| 3% | <i>Mostly oppose</i> |
| 2% | <i>Totally oppose</i> |
| 8% | OPPOSE (Net) |

Expanding EITC As An Alternative

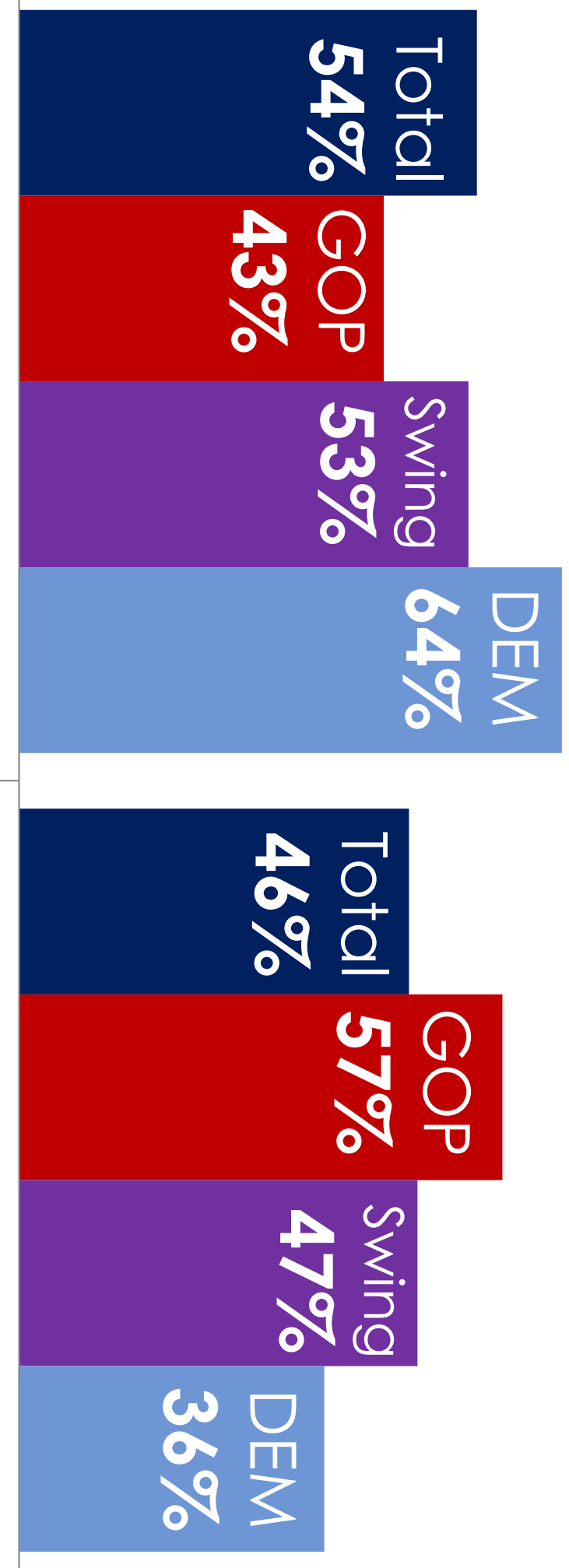
Midwest Favors Exemptions

Which of these alternative policy proposals to raising the minimum wage do you support most?
(Top 3 Responses)

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|---|
| 24% | 26% | 22% | 12% | 32% | Expanding the Earned Income Tax Credit to support hard work and wage growth |
| 21% | 15% | 20% | 34% | 17% | Exemptions to a minimum wage increase for small businesses or certain industry sectors. |
| 20% | 23% | 27% | 13% | 13% | Increased funding and prioritization of education and workforce programs to reduce the number of workers being paid the minimum wage. |

Slightly More Favor Raising the Minimum Wage

Which is a better way to help people with low wages?



Raising the minimum

wage



Increasing and

enhancing the Earned

Income Tax Credit

They Support Increasing Maternity and Paternity Leave

Increased **maternity** leave time

Mandate **paternity leave** policy, or increased paternity leave time

| Total | | | Total |
|-------|------------------|-----------------|-------|
| 72% | ★ | SUPPORT (Net) ★ | 82% |
| 30% | Totally Support | | 31% |
| 21% | Mostly support | | 27% |
| 21% | Somewhat support | | 23% |
| 18% | Neutral | | 12% |
| 5% | Somewhat oppose | | 4% |
| 3% | Mostly oppose | | 1% |
| 1% | Totally oppose | | 1% |
| 9% | OPPOSE (Net) | | 7% |

Non-Members Less Enthusiastic

About Increased Paternity Leave

Do you support or oppose the following issues?


Mandate paternity leave policy, or increased paternity leave time

| Total | State Chamber | Non-Chamber | |
|-------|---------------|-------------|----------------------|
| 82% | 89% | 79% | SUPPORT (NET) |
| 31% | 45% | 26% | Totally Support |
| 27% | 31% | 25% | Mostly Support |
| 23% | 13% | 28% | Somewhat Support |

They Support More Paid Sick Time And More Time Off For Sick Relatives

More **paid sick** time for
workers

More time off for workers
who need to **care for**
sick children or relatives?

| Total | | Total |
|-------|---|-------|
| 73% |  SUPPORT (Net) | 83% |
| 27% | Totally Support | 33% |
| 24% | Mostly support | 35% |
| 22% | Somewhat support | 15% |
| 11% | Neutral | 12% |
| 12% | Somewhat oppose | 2% |
| 3% | Mostly oppose | 2% |
| 1% | Totally oppose | 1% |
| 16% | OPPOSE (Net) | 5% |

Words That Work

Paid Leave Policies

At some point, nearly everyone will need to take time away from work to deal with a serious personal or family illness, or to care for a new child. Our nation's public policies are failing to meet the needs of workers and their families.


Laws providing paid family and medical leave allow workers to meet their health and family needs without jeopardizing their economic security.



CMD: The Chambers have been opposing efforts by the National Partnership and others to enact paid leave....

Support for Predictive Scheduling

Proposed "predictive scheduling" measures would limit employers' ability to use on-call scheduling for their employees, requiring them to give sufficient advance notice to employees about when they will or will not be working. Do you support or oppose these proposed measures?

| Total | |
|-------|--|
| 78% |  SUPPORT (Net) |
| 21% | <i>Totally Support</i> |
| 36% | <i>Mostly support</i> |
| 21% | <i>Somewhat support</i> |
| 11% | <i>Neutral</i> |
| 8% | <i>Somewhat oppose</i> |
| 1% | <i>Mostly oppose</i> |
| 2% | <i>Totally oppose</i> |
| 11% | OPPOSE (Net) |

And Cost Are Top Concerns

What aspect of predictive scheduling concerns you the most?

| Total | South | East | Midwest | West | |
|-------|-------|------|---------|------|---|
| 43% | 41% | 36% | 37% | 63% | It takes away flexibility for employees as well as employers |
| 39% | 29% | 45% | 48% | 36% | It would increase costs by requiring businesses to pay employees for cancelled shifts |
| 32% | 35% | 42% | 21% | 37% | It makes it impossible to be flexible when running a business |
| 32% | 39% | 23% | 20% | 47% | It would add undue burdens on managers' time |
| 30% | 30% | 27% | 44% | 10% | It's an unfair burden on service-oriented businesses, especially small businesses |
| 24% | 27% | 26% | 29% | 8% | It's an undue intrusion by the government into business autonomy |

What These Results All Have in Common

WARN

These aren't government regulations – they're personal protections

CMD:
Luntz is about to tell chamber of
commerce lobbyists how to overcome
this....

Finding State Solutions to Rising Healthcare Costs



Healthcare: Costs, Costs, Costs

| Which of the following issues do you care about the most? | | | | | |
|---|------|-------|---------|------|--|
| Total | East | South | Midwest | West | |
| 38% | 36% | 36% | 57% | 25% | Keeping healthcare costs low for American families |
| 30% | 26% | 27% | 33% | 36% | Replacing the Affordable Care Act |
| 29% | 30% | 23% | 40% | 25% | Giving employees more choices and control over their healthcare options |
| 25% | 27% | 24% | 14% | 37% | Making healthcare costs more affordable for small businesses |
| 20% | 22% | 23% | 21% | 13% | Finding state-based solutions to healthcare coverage issues |
| 19% | 15% | 30% | 12% | 15% | Promoting innovation in the healthcare sector to reduce costs and save lives |
| 18% | 18% | 24% | 4% | 25% | Expanding access and coverage to more people |
| 10% | 13% | 10% | 6% | 13% | Reducing government regulation and red tape |
| 10% | 12% | 4% | 13% | 12% | Freedom to decide whether to provide benefits like birth control |

they Trust States Over DC on EVERY Attribute.

Whom do you think would...

| State Gov't | The Federal Gov't | |
|-------------|-------------------|---|
| 76% | 24% | ... give you more control over our healthcare? |
| 74% | 26% | ...run a more individualized, personalized, flexible healthcare system |
| 73% | 27% | ...run a more accountable healthcare system? |
| 73% | 27% | ...run a less bureaucratic healthcare system? |
| 73% | 27% | ...run a more innovative, intelligent healthcare system? |
| 70% | 30% | ...run a more affordable healthcare system? |

Words That Work

Every American Deserves...

Every American deserves health insurance - affordable, patient-centered insurance. That's not what the Affordable Care Act does, but it is what we're committed to delivering. Efficient, effective and accountable public programs to provide a secure safety net, and a strong, vibrant marketplace to provide the freedom and choice we all deserve. [LG]

Total: 31%

GOP: 23%

Swing: 35%

Words That DON'T Work

Extreme Language Doesn't Resonate

Obamacare is a command-and-control regime that reduces families' choices, thwarts innovation and charts a path of European-style debt and rationed access to healthcare. If we cave and set up an exchange, Obamacare is never going away

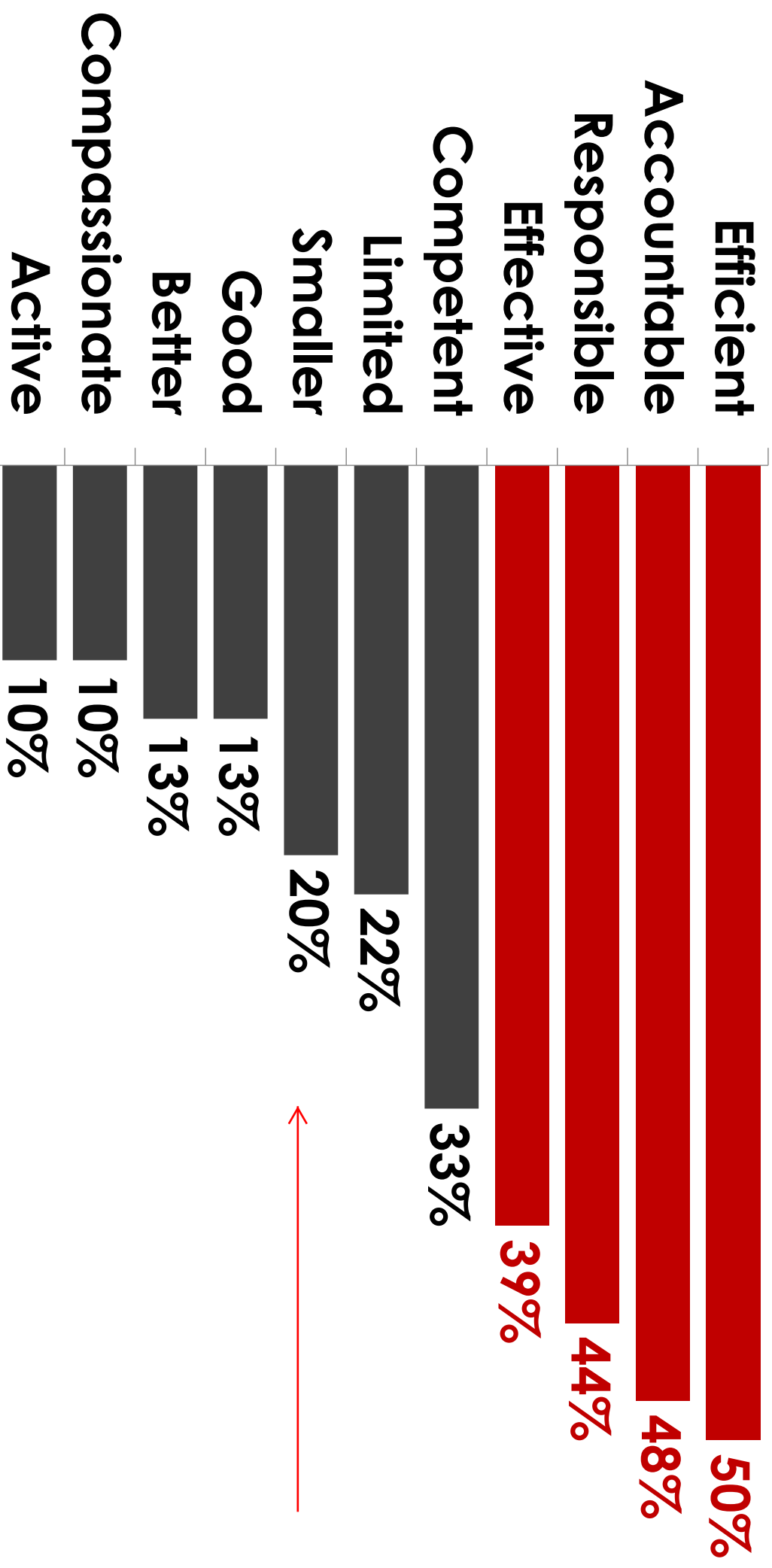
Total: 9%

GOP: 11%

Swing: 9%

Efficient, Accountable, Responsible, Effective

Which of these descriptions of the federal government do you want most for America?



Civil Rights Issues



Words That Work

Every person, regardless of their gender,
race, religion, or sexual orientation,
deserves equal opportunity and equal
protection under the law. Period. No
exceptions. [LG]

ney Support “Religious Freedom” Laws

Some states have passed “religious freedom” laws, which would allow a business not to serve a person if doing so would violate their religious beliefs. Do you support or oppose these types of laws in your state?

| Total | |
|-------|------------------|
| 70% | SUPPORT (Net) |
| 23% | Totally Support |
| 28% | Mostly support |
| 19% | Somewhat support |
| 15% | Neutral |
| 4% | Somewhat oppose |
| 2% | Mostly oppose |
| 10% | Totally oppose |
| 16% | OPPOSE (Net) |

Even if Christians are the Victims

Would you support or oppose a religious freedom bill in your state if it gave other religions the ability to discriminate against Christians?

| Total | |
|-------|-------------------------|
| 53% | SUPPORT (Net) |
| 20% | <i>Totally Support</i> |
| 21% | <i>Mostly support</i> |
| 12% | <i>Somewhat support</i> |
| 15% | <i>Neutral</i> |
| 7% | <i>Somewhat oppose</i> |
| 6% | <i>Mostly oppose</i> |
| 18% | <i>Totally oppose</i> |
| 31% | OPPOSE (Net) |

The Bottom Line:

- ✓ Advocate FOR solutions that create genuine opportunity, good-paying jobs, and fulfilling careers for everyone
- ✓ Argue policy – both benefits and consequences – on personal grounds
- ✓ Drop the partisan rhetoric

it's not what you say

it's what people hear

luntz global



CMD:
This is a famous
catch-phrase of
GOP pollster
Frank Luntz.

Is your firm, a member of the Chamber of Commerce or another business advocacy group?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|---|
| 46% | 43% | 40% | 52% | 47% | Yes, my local Chamber of Commerce |
| 28% | 26% | 26% | 25% | 35% | Yes, my state Chamber of Commerce |
| 16% | 19% | 15% | 7% | 23% | Yes, the US Chamber of Commerce |
| 19% | 16% | 18% | 25% | 14% | Yes, another business advocacy group such as the Small Business Advisory Council, National Federation of Independent Business, etc. |
| 15% | 10% | 10% | 8% | 30% | I used to be a member of my local Chamber of Commerce, but am not anymore |
| 16% | 14% | 17% | 16% | 17% | I used to be a member of my state Chamber of Commerce, but am not anymore |
| 9% | 10% | 9% | 7% | 12% | I used to be a member of the US Chamber of Commerce, but am not anymore |
| 5% | 4% | 3% | 10% | 3% | I used to be a member of another business advocacy group, but am not anymore |
| 29% | 32% | 30% | 32% | 21% | No, I am not a member of a Chamber of Commerce and never have been |
| 63% | 62% | 57% | 61% | 71% | CURRENT MEMBER (NET) |

Business Friendly Environment

*Which term best describes the environment
for business in your state?*

**Total
76%**

**Total
24%**

Friendly

Hostile

“Business” and “Employees” Are Preferred Terms

*When it comes to describing the place you work,
which word do you like more?*

Business

Total 55%

Company

45%

*When it comes to describing the people who work
at a business, which word do you like more?*

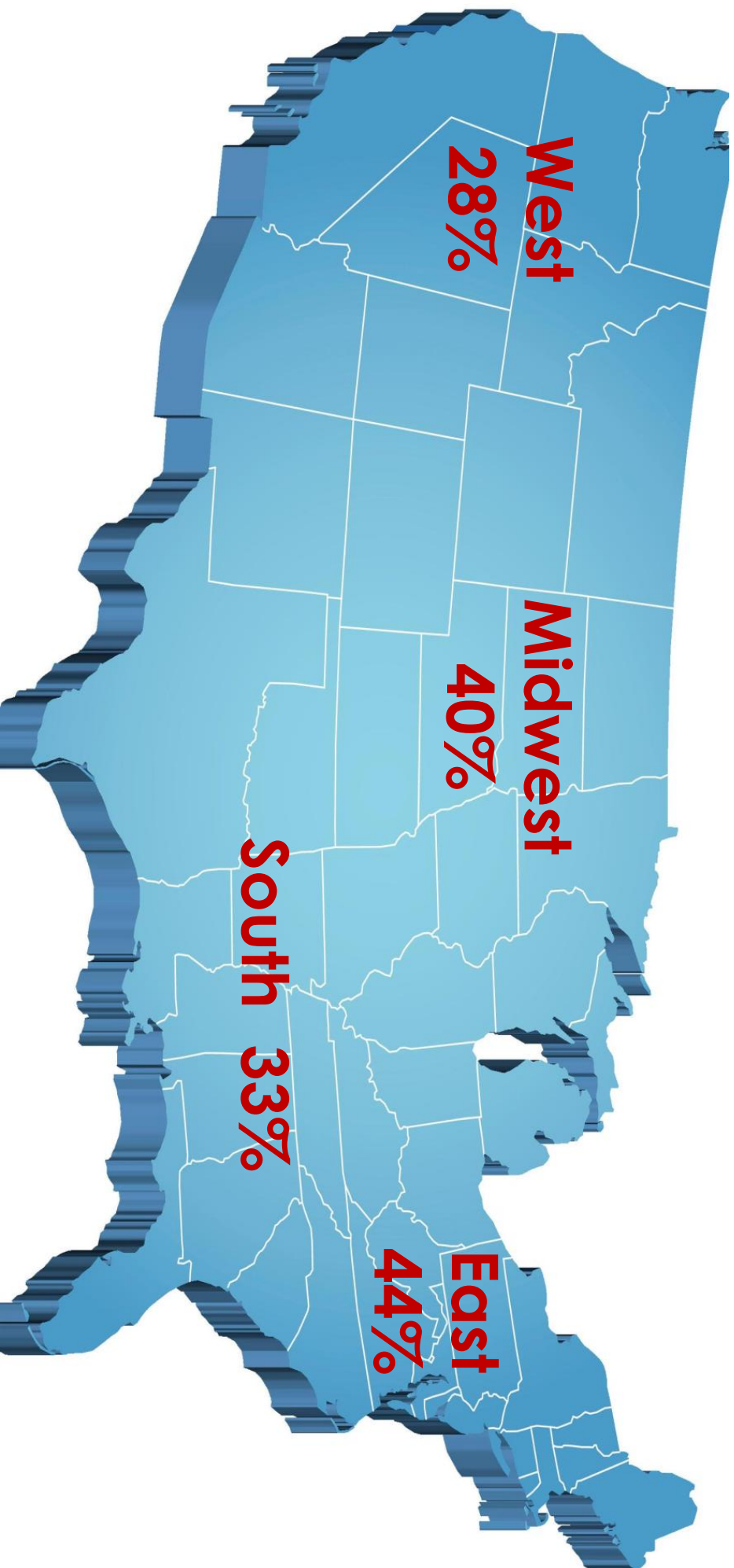
Employees

Total 72%

Workers

28%

Economic Development and Tax Incentives



| Total | East | South | Midwest | West | Economic development and tax incentives |
|-------|------|-------|---------|------|---|
| 36% | 44% | 33% | 40% | 28% | |


Effective Transportation Spending

Which of the following issues do you care about the most?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|---|
| 43% | 44% | 63% | 39% | 5% | Making transportation spending more efficient and effective |
| 32% | 40% | 23% | 31% | 44% | Keeping gas taxes low |
| 30% | 23% | 14% | 46% | 53% | Creating new jobs through infrastructure projects |
| 25% | 9% | 45% | 18% | 9% | Keeping transportation and shipping costs low |
| 23% | 23% | 30% | 22% | 11% | Improving roads, bridges, and highways where I do business |
| 21% | 33% | 4% | 24% | 41% | Investing in new types of transport, like high speed rail |
| 18% | 22% | 12% | 17% | 27% | Increased funding for infrastructure through gas taxes |
| 8% | 7% | 9% | 3% | 12% | Updating our national air traffic control system |

Workers Attracted To Other States

Which of the following options do you believe is the main reason businesses cannot find the qualified employees that they need?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|---|
| 31% | 36% | 27% | 23% | 37% | Qualified workers are attracted to other states |
| 26% | 26% | 34% | 23% | 19% | Government policies and regulation |
| 25% | 30% | 22% | 40% | 17% | Wages are too low  |
| 24% | 26% | 19% | 43% | 17% | The new workforce isn't willing to show up on time or work hard enough |
| 23% | 17% | 20% | 11% | 38% | Too many students are going to college instead of trade schools |
| 23% | 25% | 15% | 28% | 26% | Students are not equipped with the skills needed to succeed |
| 20% | 16% | 29% | 17% | 16% | Not enough new people are entering your field |
| 14% | 12% | 19% | 12% | 12% | Older, qualified employees have retired or left the job market |
| 12% | 11% | 14% | 4% | 17% | Not enough students are going to college |

Trainee Wage Doesn't Work

Which of the following do you believe should be your state's highest priority? (Bottom 4 Responses)

| Total | South | East | Midwest | West | |
|-------|-------|------|---------|------|--|
| 11% | 12% | 17% | 5% | 11% | Ensure every child graduates from high school ready to work |
| 10% | 13% | 12% | 10% | 7% | Develop a long-term strategy to ensure we have a world-class university system |
| 10% | 11% | 8% | 13% | 5% | Attracting educated and skilled workers |
| 8% | 10% | 8% | 5% | 8% | Ensure every child graduates from college ready to work |

The Mandates that Matter

Which of the following **employer mandate issues** do you care about the most?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|--|
| 46% | 48% | 43% | 51% | 42% | Raising the minimum wage  |
| 36% | 31% | 52% | 37% | 20% | Regulations concerning hiring, promoting, and firing employees |
| 30% | 27% | 25% | 33% | 37% | Reducing government regulation of employee benefits |
| 24% | 11% | 33% | 35% | 18% | Keeping the minimum wage the same/lowering the minimum wage |
| 20% | 18% | 18% | 16% | 29% | Mandatory paid leave/sick time |
| 17% | 25% | 10% | 10% | 22% | Regulations concerning zoning and land use |
| 16% | 24% | 9% | 11% | 20% | Predictive scheduling |
| 11% | 16% | 10% | 8% | 12% | Maternity and paternity leave |

Language of the Minimum Wage

Which of the following statements on the minimum wage do you support the MOST? (Top 2 Responses)



| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|--|
| | | | | | The vast majority of us are working harder but we're watching our families slipping further behind. It is not fair, it is not right, it is not just that people work 16-hour days and still be raising their children in poverty. Raising the minimum wage is not only fair, it's going to fuel economic growth and greater consumer demand. |
| 27% | 27% | 28% | 28% | 25% | |
| 27% | 29% | 26% | 30% | 21% | Corporate profits and GDP are up. But if you work at Wal-Mart, if you are paid so little that you still need food stamps to put groceries on the table, what does more money in stockholders' pockets and a higher GDP do for you? No one in America should work full time and still live in poverty. We must raise the minimum wage. |

Language of the Minimum Wage

Which of the following statements on the minimum wage do you support the MOST? (Bottom 2 Responses)

| Total | South | East | Midwest | West | |
|-------|-------|------|---------|------|--|
| 24% | 22% | 21% | 21% | 32% | Again and again, some call for a higher minimum wage as the solution to poverty. Yet an overwhelming majority of economists have argued for decades that raising the minimum wage doesn't work. It actually harms the poorest and most marginalized workers—those with the most tenuous grip on their jobs—by making it harder for businesses to hire. |
| 22% | 22% | 26% | 20% | 21% | Big business got its handouts. Wall Street got its bailouts. And hardworking taxpayers got the bill. It's time for common-sense solutions that deliver real opportunity and build a healthy economy for every hardworking American. We should maximize wages for everyone, not raise the minimum wage for a few. |



Stories To Use

Following a minimum wage increase, **a small business owner must decide** if she will lay off workers, cut employee benefits, or raise prices on her customers

Total: 27%

luntzglobal.com

Following a minimum wage increase, **a worker is replaced by a machine** because her company could no longer afford to pay as many workers

Total: 27%

luntzglobal.com



Stories To Lose

A single mom who went back to work loses her job because her employer couldn't afford to pay everyone a higher wage

Total: 14%

A student can't get a part-time job over the summer because companies can't afford to pay a higher minimum wage.

Total: 11%

State Preemption of Local Mandates



CMD:

Chambers of Commerce and other corporate trade groups, like the National Restaurant Association, have been pushing states to prevent local communities from adopting measures to increase the minimum wage or include paid sick leave and other progressive workplace improvements.

Concerns about Preemption

Which of the following issues do you care about the most?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|--|
| 49% | 39% | 44% | 57% | 55% | Ensuring local governments do not overly burden businesses when it comes to taxes |
| 38% | 31% | 34% | 67% | 28% | Empowering local governments to implement innovative and proven best practices |
| 34% | 53% | 25% | 20% | 36% | Encouraging local governments to work together regionally to deliver efficient and effective services |
| 32% | 27% | 27% | 21% | 49% | Ensuring local governments do not overly burden businesses when it comes to zoning and permitting regulations |
| 30% | 28% | 48% | 23% | 18% | Ensuring local governments do not overly burden businesses when it comes to union rules and occupational licensing |
| 18% | 22% | 22% | 12% | 14% | Ensuring local governments do not overly burden businesses when it comes to wages and benefits |

Words That Work

On Sexuality and Gender in the Workplace

The simple truth is that **everyone**
deserves the right to do their job
without the fear of being
discriminated against.

Race and Criminal Justice Issues

Most Important Civil Rights Issues

| Which of the following issues do you care about the most? | | | | | |
|---|------|-------|---------|------|-----------------------------|
| Total | East | South | Midwest | West | |
| 23% | 9% | 27% | 17% | 30% | Race-based discrimination |
| 20% | 32% | 17% | 24% | 15% | Criminal justice issues |
| 19% | 19% | 13% | 11% | 24% | Economic opportunity issues |
| 14% | 9% | 25% | 14% | 9% | Income inequality |
| 13% | 19% | 6% | 17% | 13% | Gender discrimination |
| 8% | 10% | 5% | 9% | 7% | Religious freedom laws |
| 3% | 2% | 6% | 10% | 0% | LGBT discrimination |

Words That Work

We must commit to providing equal protection to all people, regardless of sexual orientation, but we also have to preserve the rights of those with deeply held religious beliefs

Non-Members More Likely to Oppose “Religious Freedom” Laws

Some states have passed “religious freedom” laws, which would allow a business not to serve a person if doing so would violate their religious beliefs. Do you support or oppose these types of laws in your state?

| Total | State Chamber | Non-Chamber |
|-------|---------------|-------------|
| 70% | 85% | 64% |
| 16% | 9% | 18% |

SUPPORT (Net)

OPPOSE (Net)

Would you support or oppose a religious freedom bill in your state if it gave other religions the ability to discriminate against Christians?

| Total | State Chamber | Non-Chamber |
|-------|---------------|-------------|
| 53% | 69% | 47% |
| 31% | 22% | 35% |

SUPPORT (Net)

OPPOSE (Net)

Climate Issues Such As Environmental Regulations and Clean Power



Renewable Energy Important For Climate Issues

*Which of the following **climate issues** do you care about the most?*

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|---|
| 52% | 54% | 46% | 38% | 61% | Moving to renewable energy, instead of fossil fuels and other limited resources |
| 28% | 16% | 17% | 25% | 41% | Reducing pollution  |
| 22% | 20% | 20% | 13% | 29% | Ending special deals for special interests |
| 19% | 31% | 12% | 23% | 16% | Reducing dependence on Middle Eastern countries for oil |
| 18% | 23% | 28% | 27% | 7% | Increasing production of energy to meet American demand |
| 17% | 11% | 19% | 30% | 14% | Reducing the regulatory burden on businesses |
| 14% | 20% | 26% | 5% | 10% | Creating a more level playing field in the energy market |
| 14% | 8% | 20% | 17% | 13% | Reducing the power and scope of government agencies |
| 14% | 17% | 12% | 23% | 9% | Making energy more affordable for everyone |

Costly Regulations Are A Concern

What kind of environmental regulations concern you the most? That they are ____.

| Total | |
|-------|--------------------|
| 39% | Costly |
| 24% | Special interest |
| 20% | Inefficient |
| 17% | Ineffective |
| 16% | Job-killing |
| 16% | Bureaucratic |
| 13% | Unfair |
| 12% | Harmful |
| 11% | Burdensome |
| 11% | Sweeping [CHAMBER] |
| 10% | Unaccountable |
| 10% | Washington |

CMD:
"Chamber" = "U.S. Chamber of
Commerce"

regulation of Environmental Businesses

Hurt Small Business

What aspect of government regulation of environmental businesses concerns you most? (Top 4 Responses)

| Total | South | East | Midwest | West | |
|-------|-------|------|---------|------|--|
| 34% | 24% | 32% | 38% | 44% | It hurts small business who have to spend a fortune to comply |
| 32% | 31% | 34% | 34% | 27% | There are already so many regulations it's impossible to keep up with them |
| 29% | 27% | 38% | 29% | 22% | The regulations often are inefficient and ineffective |
| 29% | 26% | 26% | 41% | 16% | They are drafted by lobbyists and special interests |

Impact On Creativity Not A Concern

What aspect of government regulation of environmental businesses concerns you most? (Bottom 4 Responses)

| Total | South | East | Midwest | West | |
|-------|-------|------|---------|------|--|
| 26% | 22% | 22% | 23% | 40% | They cost jobs because companies can't afford to hire new workers |
| 24% | 30% | 25% | 14% | 28% | They are often written by bureaucrats who don't understand how business actually works |
| 21% | 30% | 22% | 13% | 20% | They prevent companies from being creative and innovative |
| 3% | 5% | 1% | 5% | 1% | None of these concern me—the level of environmental regulation is just fine. |

Facts about Environmental Regulation

Which of the following facts best illustrates that environmental regulations can be harmful to businesses? (Top 4 Responses)

| Total | South | East | Midwest | West | |
|-------|-------|------|---------|------|---|
| 37% | 49% | 42% | 28% | 28% | EPA's Cross State Air Pollution rule would have an impact on worker incomes equivalent to the annual loss of 34,000 jobs from 2013 through 2037, compared with EPA's claim of 700 jobs per year gained. [COC] |
| 36% | 32% | 29% | 35% | 47% | The Environmental Protection Agency (EPA) has imposed almost \$40 billion in new annual costs on Americans since 2009—more than all other agencies combined. [HERITAGE] |
| 29% | 23% | 37% | 25% | 28% | New EPA rules would force consumers across America to pay almost \$300 billion in additional electricity costs through 2030. |

CMD: "Heritage" = "Heritage Foundation"

Cost Alone Isn't A Deterrent

Which of the following facts best illustrates that environmental regulations can be harmful to businesses? (Bottom 4 Responses)

| Total | South | East | Midwest | West | |
|-------|-------|------|---------|------|--|
| 27% | 22% | 30% | 19% | 34% | Proposed EPA rules would cost businesses more than \$50 billion. [COC] |
| 26% | 26% | 31% | 18% | 26% | New EPA rules are estimated to lead to 224,000 fewer U.S. jobs on average, every year through 2030. Millions of people now working will lose their jobs. |
| 22% | 21% | 18% | 37% | 19% | An additional \$1 million in regulation-induced spending produces a net decrease of 1.5 jobs. |
| 22% | 26% | 14% | 37% | 19% | The cost of the Clean Air Act has been about \$1 billion. |

What kind of environmental policy do you most support when it comes to energy?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|------------------------------------|
| 29% | 28% | 32% | 23% | 31% | Efficient |
| 28% | 25% | 27% | 36% | 27% | Responsible |
| 20% | 19% | 19% | 19% | 24% | Environmentally-friendly |
| 20% | 19% | 26% | 18% | 17% | Sustainable |
| 20% | 21% | 16% | 32% | 16% | Clean |
| 16% | 15% | 21% | 14% | 14% | Renewable |
| 16% | 17% | 13% | 18% | 17% | Effective |
| 16% | 15% | 19% | 18% | 11% | Business-friendly |
| 13% | 14% | 9% | 10% | 19% | Healthy |
| 13% | 15% | 10% | 6% | 18% | Green |
| 8% | 11% | 9% | 7% | 6% | 21 st Century [Chamber] |

The Impact of Legalizing Marijuana on Employers and a Safe Workplace



Regions Split on Marijuana

Which of the following issues do you care about the most?

| Total | East | South | Midwest | West | |
|-------|------|-------|---------|------|--|
| 28% | 26% | 5% | 44% | 17% | Ensuring marijuana is safe and accessible for adults who want to use it recreationally |
| 21% | 27% | 25% | 10% | 33% | Putting smart laws in place surrounding the legalization of marijuana, similar to our alcohol laws |
| 19% | 5% | 12% | 34% | 10% | Punishing states like Colorado and Washington that have already legalized marijuana |
| 14% | 17% | 28% | 3% | 21% | Making sure marijuana is only available to those who have a medical need |
| 10% | 18% | 12% | 3% | 11% | Measures to ensure employees do not drive or report to work under the influence |
| 9% | 7% | 19% | 8% | 8% | Keeping marijuana illegal, even for medicinal purposes |