



**Public Strategies**

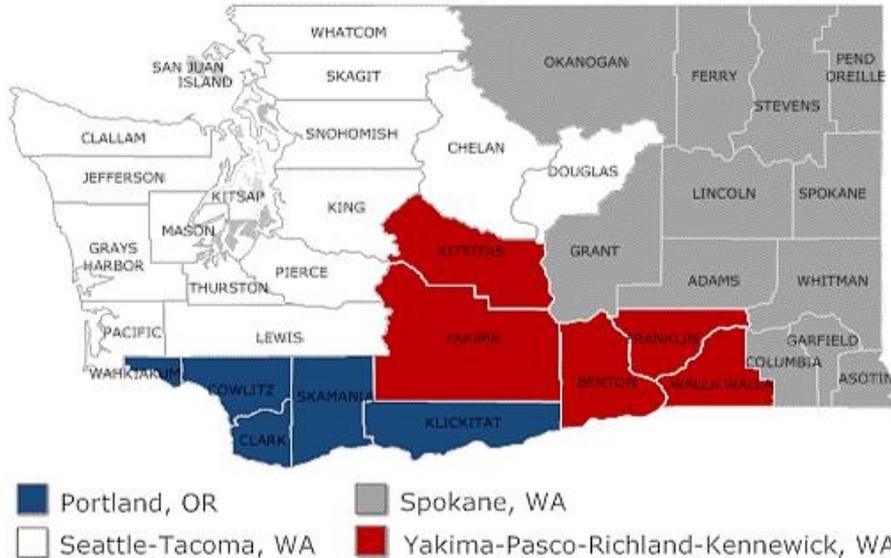
**WASHINGTON BUSINESS SURVEY**

**Presented By:**  
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Boise, ID 83702

# SURVEY SPECIFICS

## Washington



**Survey Conducted: November/December, 2014**

N= 400 Statewide Likely Voters

Margin Of Error: +/- 4.9%

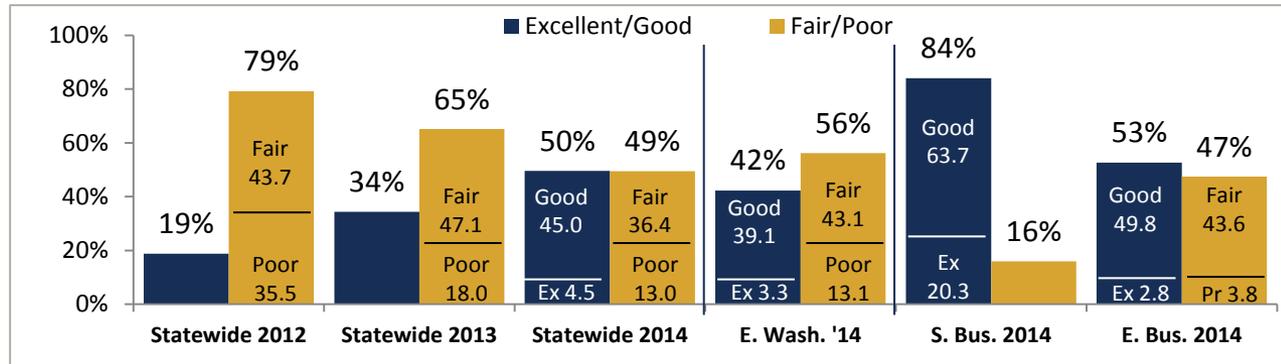
N = 200 Oversample of Yakima and Spokane  
Media Markets

N= 70 Seattle Business Community Leaders

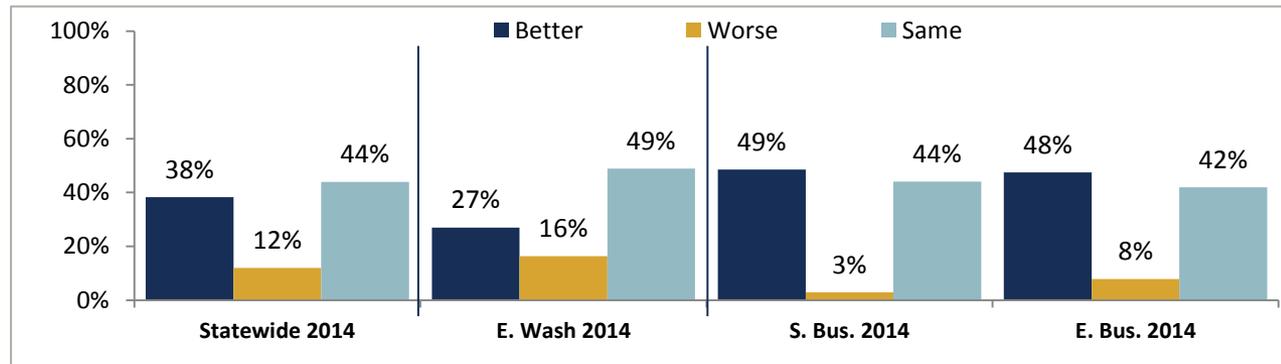
N= 293 Eastern Washington Business Leaders  
(Joint Spokane Journal of Business/TRIDEC)

# WASHINGTON'S ECONOMY

Generally speaking, how would you rate the economy in Washington—excellent, good, fair or poor?



Over the next 2 years, do you think Washington's economy is going to get better, worse or stay the same?



# WASHINGTON'S MOST IMPORTANT INDUSTRIES

Which company is the most important for advancing a positive image of the Washington business community around the country and throughout the world?

	2012	2013	2014	E. Wash.	S. Bus.
Boeing	39.9 ←	29.2 ←	27.9	28.1	11.4
Microsoft	21.4	22.9	20.7	22.3	17.1
Farmers	16.4 ←	11.7 ←	6.2	14.2	5.7
Amazon	2.7 →	10.9 →	11.7	6.2	18.6
Costco	4.4 →	9.4 →	14.2	10.2	11.4
Starbucks	3.6	3.6	5.4	3.3	11.4
Weyerhaeuser	2.9	2.2	2.8	1.5	0.0
REI	1.7	1.9	2.0	2.9	8.6
Nordstrom	0.6	1.3	1.2	--	5.7

Which of the following is the most important sector of Washington's economy?

	2013	2014	E. Wash.	S. Bus.
Technology	28.2	35.5	20.8	58.0
Aerospace	22.0	18.0	11.7	13.0
Ag/Timber	19.4	17.8	41.3	10.1
Manufacturing	10.1	11.6	6.2	5.8
Health Care	7.8	4.8	6.2	4.4
Tourism	-	1.8	2.6	4.4

WA Economy in 2 Years (Statewide)	Overall	Most Important Sector of WA Economy				
		Technology	Aerospace	Agriculture	Manufacturing	Health Care
Better	38.3	48.3	33.5	24.3	38.1	34.4
Worse	12.0	4.6	12.8	17.7	13.4	21.6
Stay the Same	43.9	43.7	50.6	50.4	43.3	28.5
<b>Net Better</b>	<b>+26.2</b>	<b>+43.7</b>	<b>+20.7</b>	<b>+6.6</b>	<b>+24.6</b>	<b>+12.9</b>

# WHAT IS INTERESTING WHEN IT COMES TO BUSINESS?

From the following list, what is the **best reason for businesses to locate** in Washington?

1. The good quality of life
2. The well-educated workforce
3. The low cost of power
4. The government policies that encourage economic growth
5. The vibrant business community
6. The strong transportation system

	Statewide	E. Wash.	S. Bus.
Quality of Life	32.5	32.8	40.0
Educated Workforce	32.3	17.9	37.1
Low Cost of Power	13.0	22.3	7.1
Government Policies	6.7	8.4	4.3
Business Community	5.7	4.7	8.6
Transportation System	2.9	3.3	0.0
Don't Know	6.9	10.6	2.9

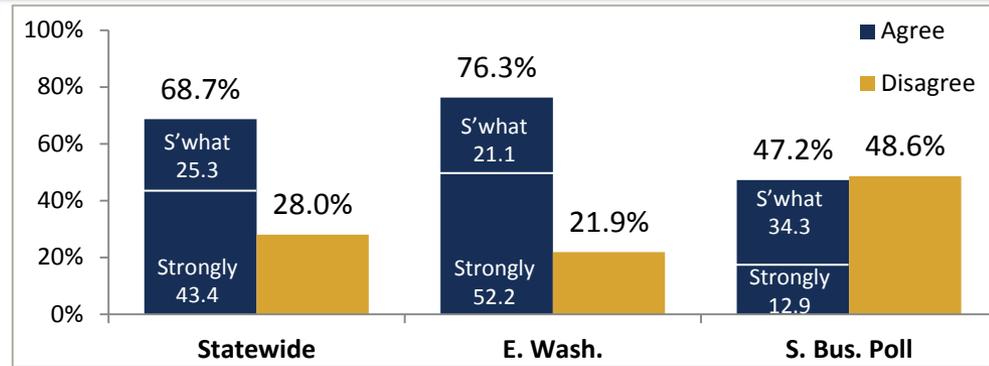
From the following list, what is the **biggest deterrent to a business to locating in Washington?**

1. Government regulations that discourage economic growth
2. A weak transportation system
3. The strong organized labor culture
4. The activist environmental community
5. Lack of a highly educated workforce
6. The lack of a vibrant entrepreneurial culture

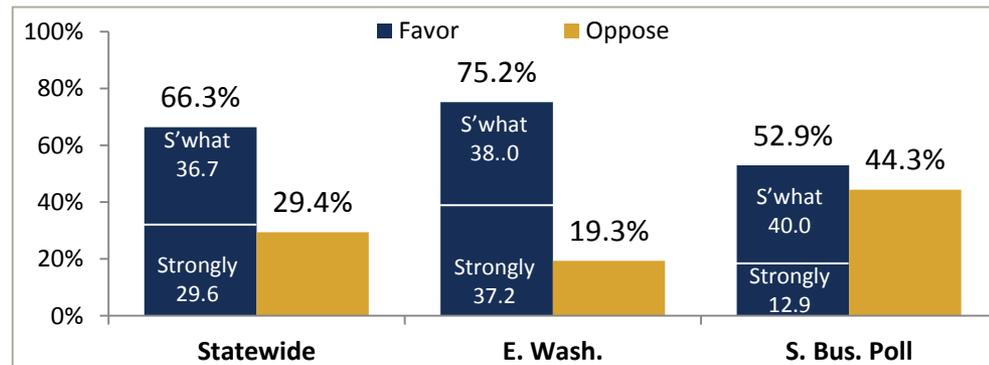
	Statewide	E. Wash.	S. Bus.
Government Regulations	35.2	44.9	27.5
Weak Transportation	22.7	11.7	46.4
Organized Labor	12.8	8.8	11.6
Environmental Community	10.3	8.4	5.8
Lack/Educated Workforce	4.1	6.9	2.9
Lack/Entrepreneurial Spirit	3.2	4.7	0.0
Don't Know	11.7	14.6	5.8

# ATTRACTING NEW JOBS TO WASHINGTON

Agree/Disagree: Lower state taxes are critical to helping attract new business and jobs.



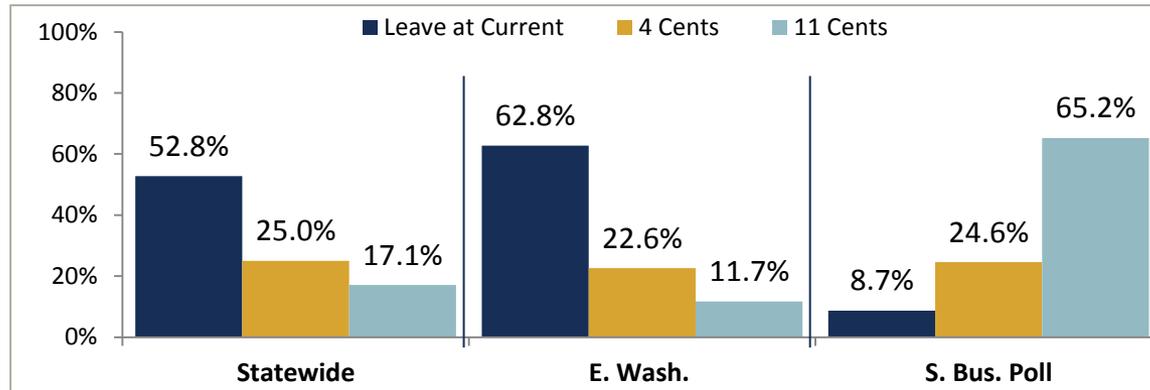
Would you favor or oppose Washington giving special tax rates to new businesses in order to incentivize them to locate here?



# TRANSPORTATION FUNDING

When it comes to **funding transportation projects** in Washington, please tell me which of the following you would prefer:

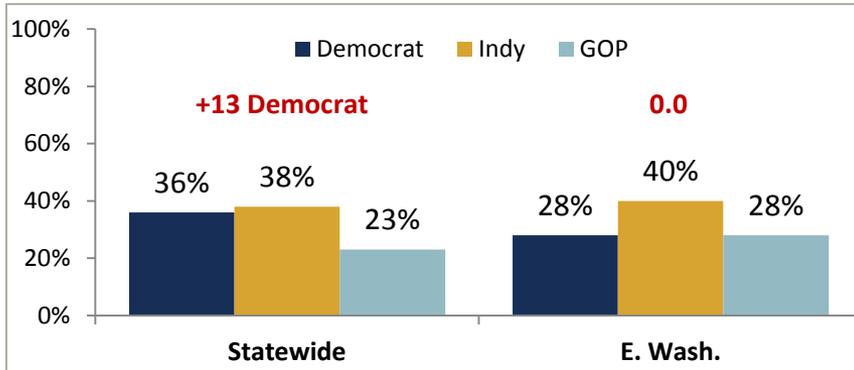
- Leaving gas taxes at current levels** and making the transportation department use their current budget to maintain existing infrastructure.
- Increasing gas taxes by 4 cents per gallon** in order to pay for maintenance and the preservation of existing infrastructure, including roads, bridges and rail
- Increasing gas taxes by 11 cents per gallon** in order to pay for new transportation projects, including public transit and improving freight rail



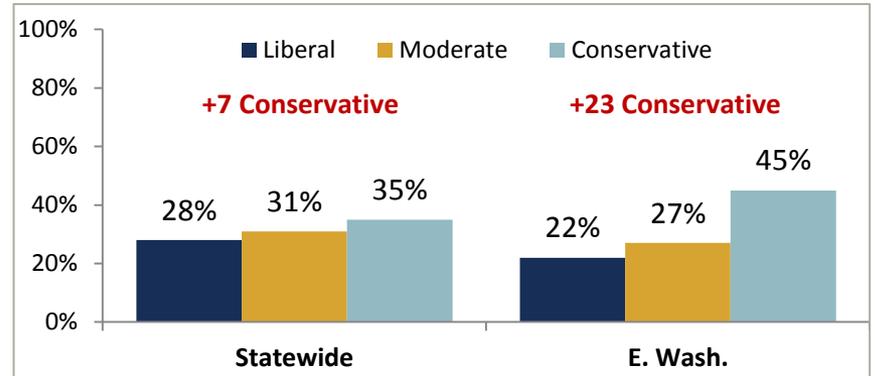
(Statewide)	Overall	Party			WA's Economy	
		Dem	Indy	GOP	Ex/Good	Fair/Poor
Leave Current	52.8	36.6 →	55.9 →	74.8	40.7	65.2
Increase 4 Cents	25.0	31.8	21.8	18.7	31.2	19.3
Increase 11 Cents	17.1	26.6	17.1	4.2	24.0	10.5

# WASHINGTON'S POLITICAL CLIMATE

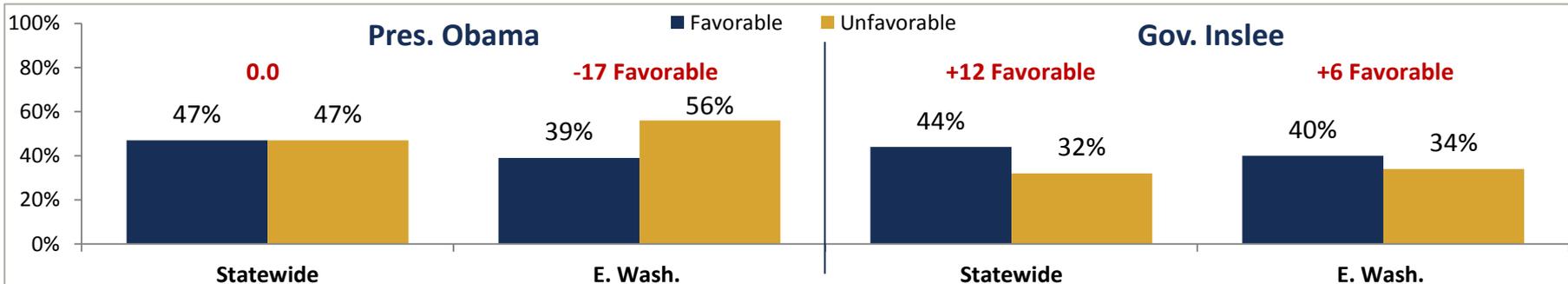
## Party



## Ideology

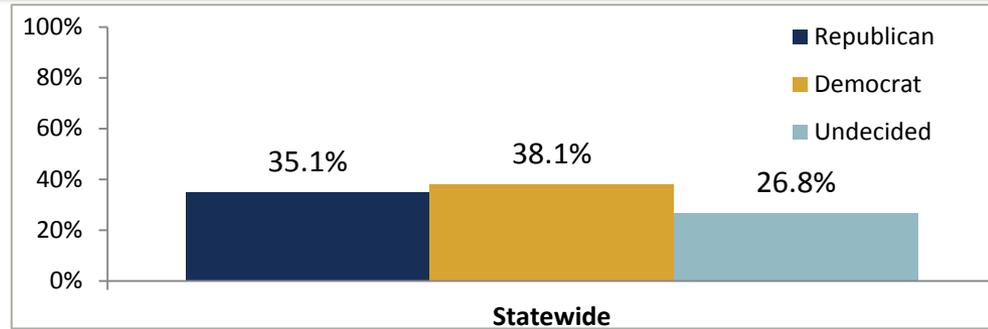


## Image Ratings



# WASHINGTON'S POLITICAL CLIMATE

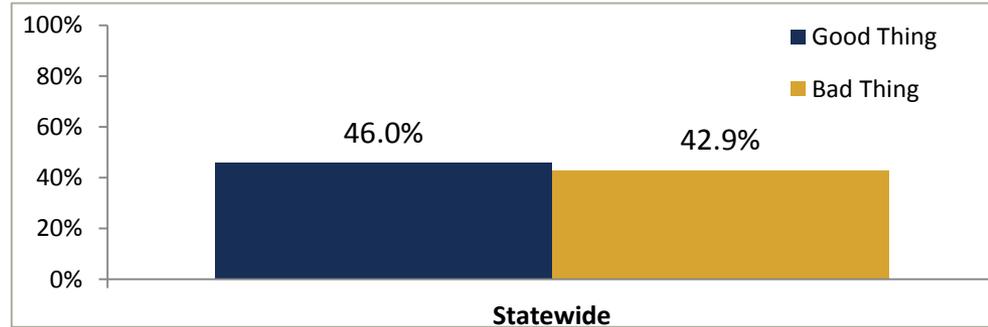
If the elections for state legislature were held today would you prefer to vote for the Republican candidate or the Democrat candidate?



	Overall	WA's Economy	
		Ex/Good	Fair/Poor
Republican	35.1	24.6	45.5
Democrat	38.1	50.8	25.4
Undecided	26.8	24.6	29.0

Which of the following comes closest to your opinion:

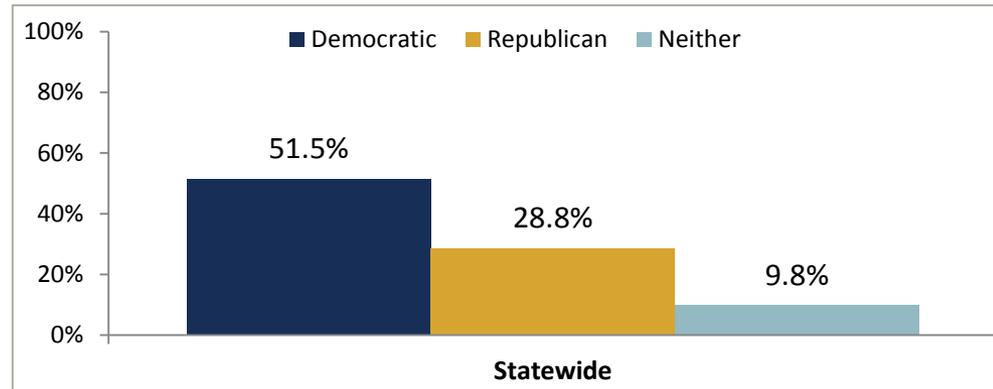
- Republicans** and the majority caucus retaining **control of the state senate is a good thing** because it will force Governor Inslee and the legislature to work together to pass bipartisan legislation; or,
- Republicans** and the majority caucus retaining **control of the state senate is a bad thing** because it will create more gridlock in our state government.



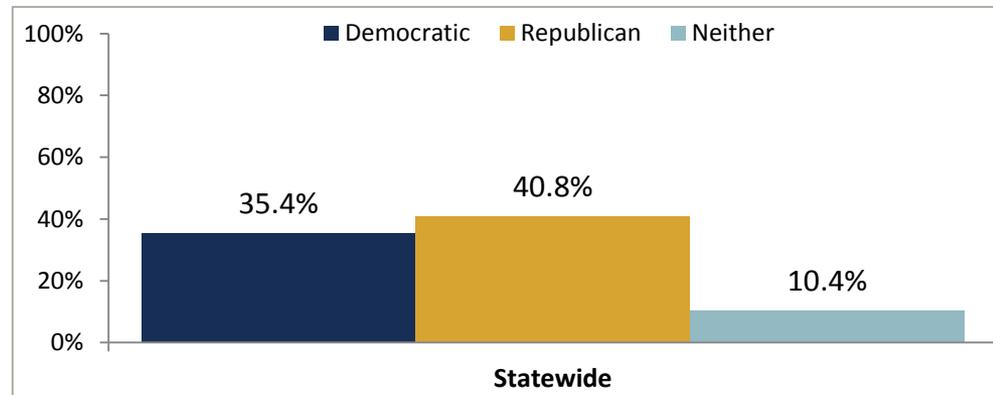
	Overall	WA's Economy	
		Ex/Good	Fair/Poor
Good Thing	46.0	37.6	54.6
Bad Thing	42.9	52.7	33.1

# WASHINGTON'S POLITICAL CLIMATE

Please tell me which political party will do a better job handling each of the following issues – the Republican Party or the Democratic Party:  
***Funding Education***

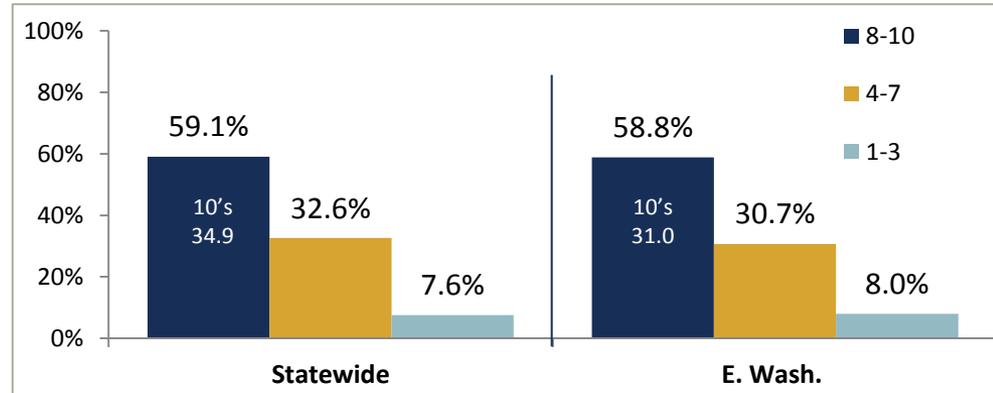


Please tell me which political party will do a better job handling each of the following issues – the Republican Party or the Democratic Party:  
***Growing the Economy and Creating Jobs***



# CONCERNS ABOUT THE ENVIRONMENT

On a scale of 1 to 10 with 1 being not at all concerned and 10 being highly concerned, please tell me how concerned you are about protecting the environment in Washington?



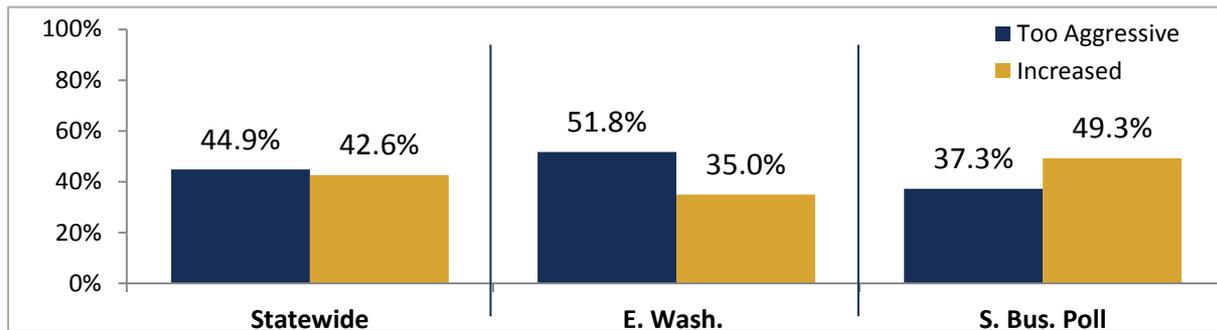
What is the most important environmental issue facing Washington today?

	Statewide
Don't Know	20.2
Water Quality Issues	15.9
Air Pollution	8.1
Trains/Oil/Coal	5.9
Puget Sound/Salish Sea	5.5
Deforestation	4.9
General Pollution	4.5
Climate Change	4.2
Hanford Clean-up	3.7
Environmentalists/EPA	3.2
Government Regulations	3.1
Renewable/Sustainable Energy	2.6

# CONCERNS ABOUT THE ENVIRONMENT

Which of the following statements comes closest to your opinion?

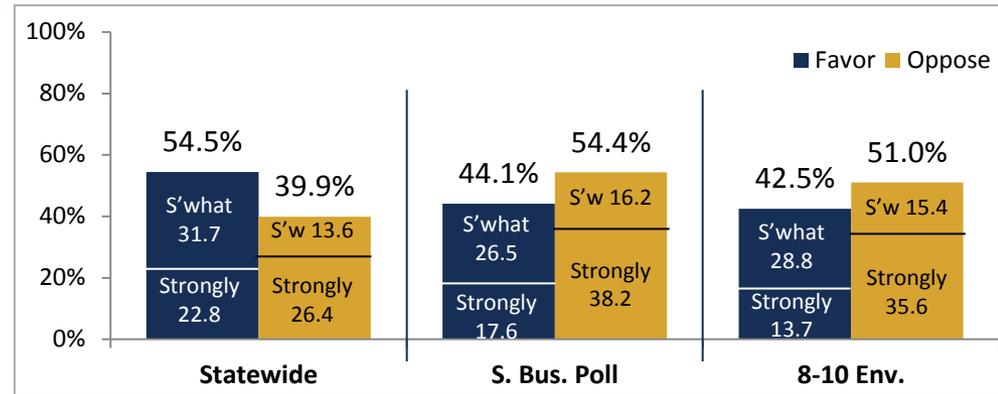
- Environmental activism** in the State of Washington is **too aggressive**, resulting in slower job creation and economic growth
- Environmental activism** in the State of Washington **should be increased** in order to protect our environment



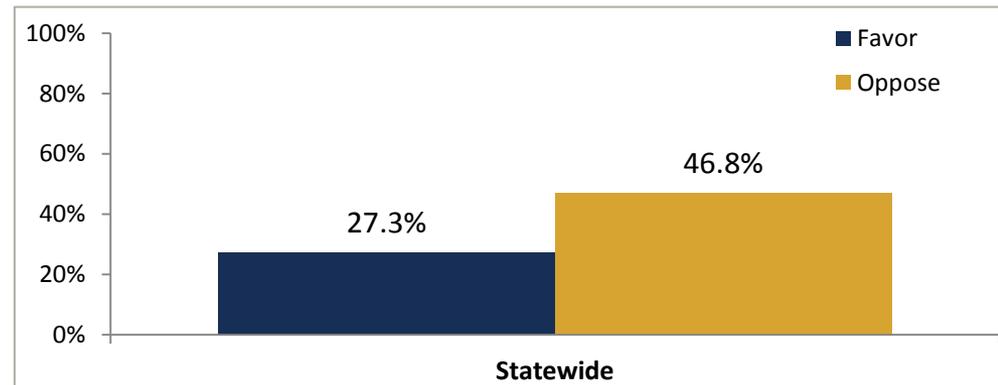
(Statewide)	Overall	Party			WA's Economy		Env. Concern	
		Dem	Indy	GOP	Ex/Good	Fair/Poor	4-7	8-10
Too Aggressive	44.9	25.0 →	44.7 →	75.9	37.9	51.6	75.8	24.2
Should Increase	42.6	65.2	37.6	16.2	51.6	33.6	18.0	60.1
<b>Net Too Aggressive</b>	<b>+2.4</b>	<b>-40.2</b>	<b>+7.1</b>	<b>+59.8</b>	<b>-13.7</b>	<b>+18.0</b>	<b>+57.8</b>	<b>-35.9</b>

# THE SILENT MAJORITY

Please tell me, do you favor or oppose shipping fossil fuels like oil and coal along Washington's railways?

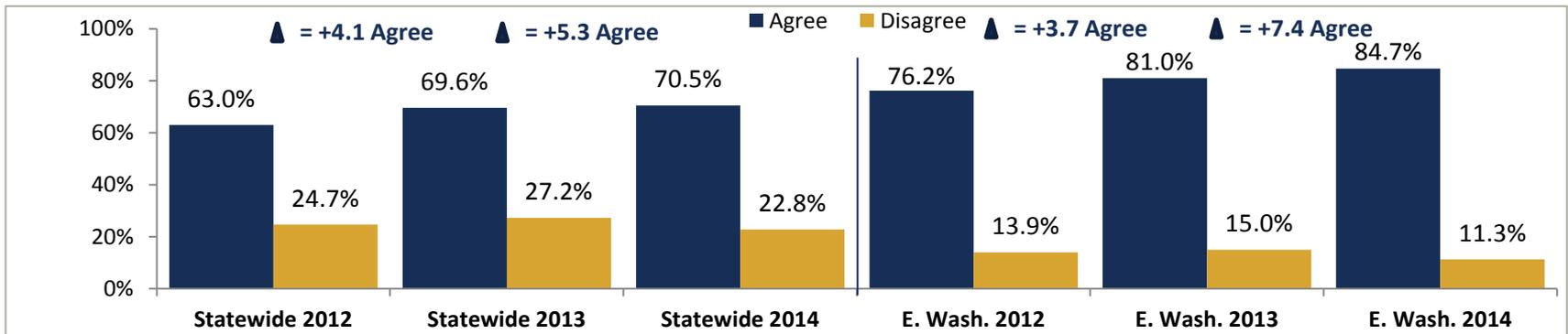


To the best of your knowledge, does the majority of the public favor or oppose shipping fossil fuels like oil and coal along Washington's railways?



# KING COUNTY INFLUENCE

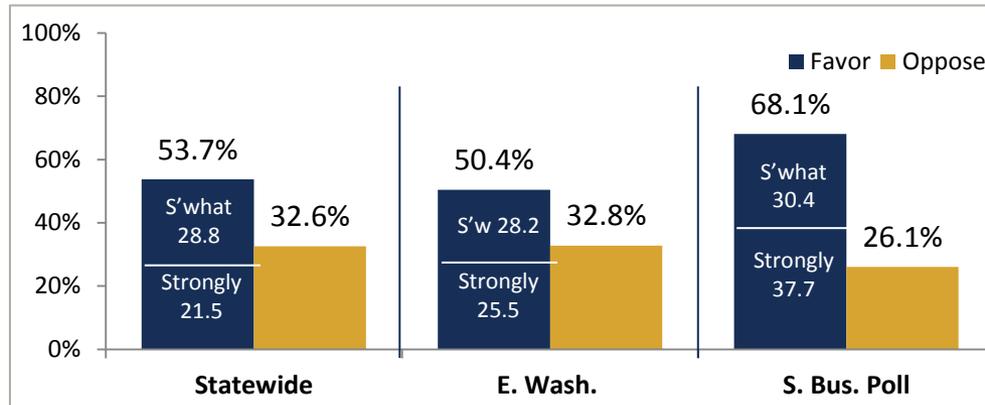
Agree/Disagree:  
King County has too much influence over policies that affect all of Washington State.



Statewide	Overall	Area		Pierce County
		King Co.	Rest of WA	
Agree	<b>70.5</b>	56.1	76.9	68.2
Disagree	<b>22.8</b>	36.6	16.6	20.5
<b>Net Agree</b>	<b>+47.7</b>	<b>+19.5</b>	<b>+60.3</b>	<b>+47.7</b>

# CARBON REDUCTION IN WASHINGTON

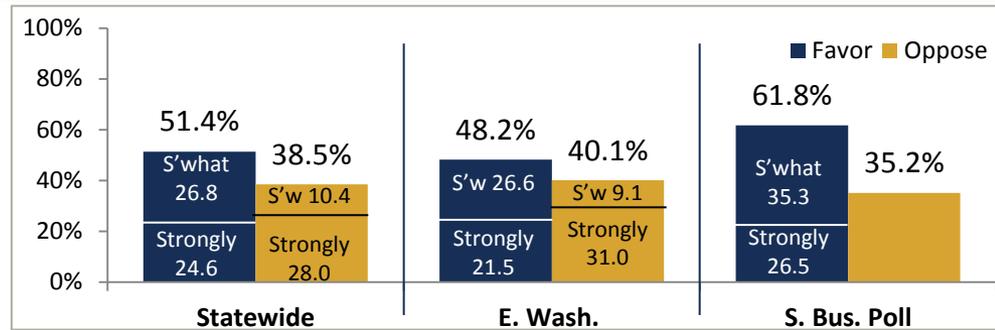
Would you favor or oppose the State of Washington imposing a carbon tax on carbon producing businesses if it also lowered the state sales tax by 1% and eliminated the current business and occupation taxes on Washington's businesses, causing the new carbon tax to be revenue neutral?



(Statewide)	Overall	Party			Age		Gender	
		Dem	Indy	GOP	18-34	65+	Male	Female
Favor	53.7	69.5	47.8	38.5	76.6	46.3	50.8	56.4
Oppose	32.6	18.9	36.7	46.2	21.7	39.3	37.8	27.9
Net Oppose	+21.1	+50.6	+11.0	-7.8	+54.9	+7.0	+13.0	+28.5

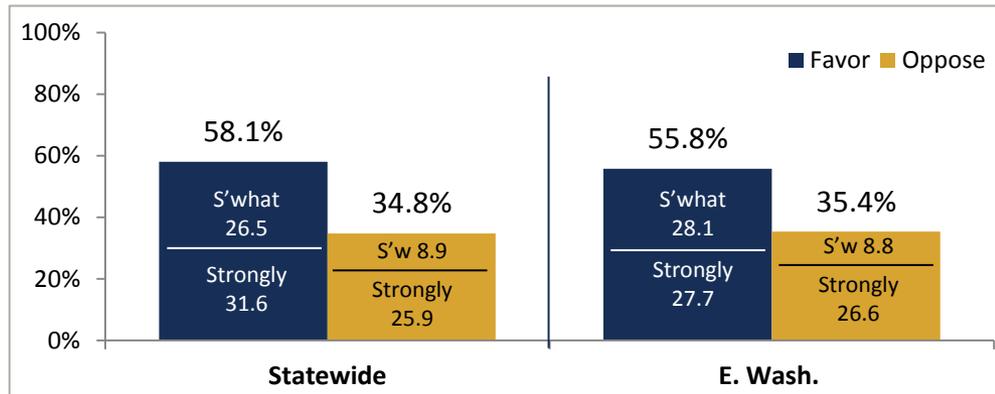
# CARBON REDUCTION IN WASHINGTON

A cap and trade program in Washington State would set a **limit to carbon dioxide emissions** permitted. Companies that exceed the limit would have to purchase carbon credits from companies who are under their limits. The goal would be to cut greenhouse gas emissions to 25% below 1990 levels by 2035. Knowing this, would you **favor or oppose the State of Washington imposing a cap and trade system?**



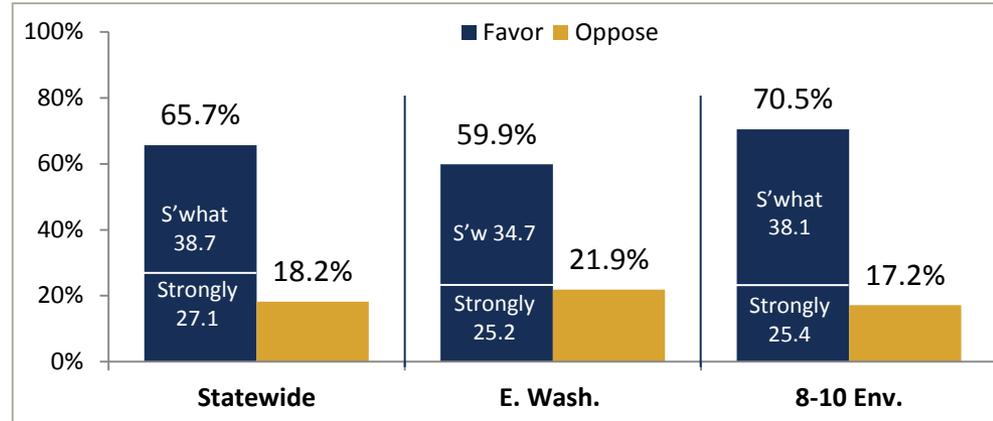
(Statewide)	Overall	Party			Age		Gender	
		Dem	Indy	GOP	18-34	65+	Male	Female
Favor	51.4	71.3	47.4	28.4	57.7	41.0	44.7	57.6
Oppose	38.5	19.9	40.6	61.4	32.2	47.2	47.0	30.7
<b>Net Oppose</b>	<b>+13.0</b>	<b>+51.4</b>	<b>+6.8</b>	<b>-33.0</b>	<b>+25.5</b>	<b>-6.2</b>	<b>-2.2</b>	<b>+27.0</b>

Now, would you favor or oppose the State of Washington imposing a **cap and trade system** on Washington's carbon producing businesses if you knew the tax dollars generated would be used to fund **education and transportation** projects?

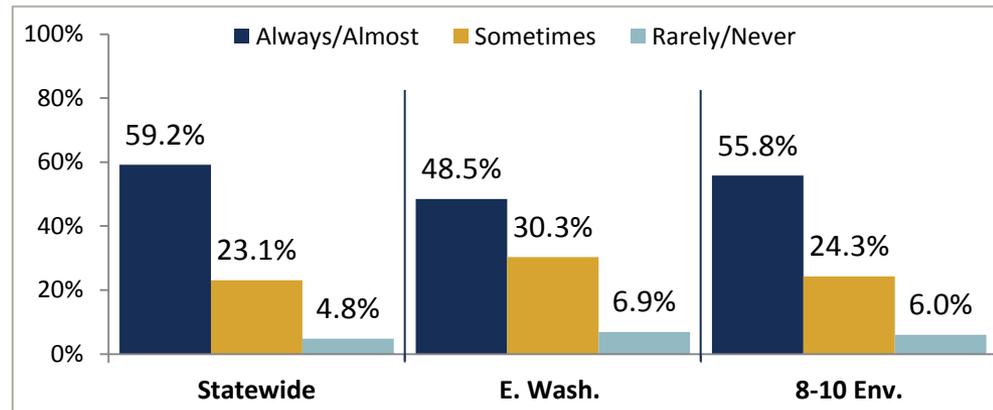


# SHELLFISH AND TIMBER

Would you favor or oppose Washington's state agencies implementing policies that will support the growth of shellfish farming in Washington?

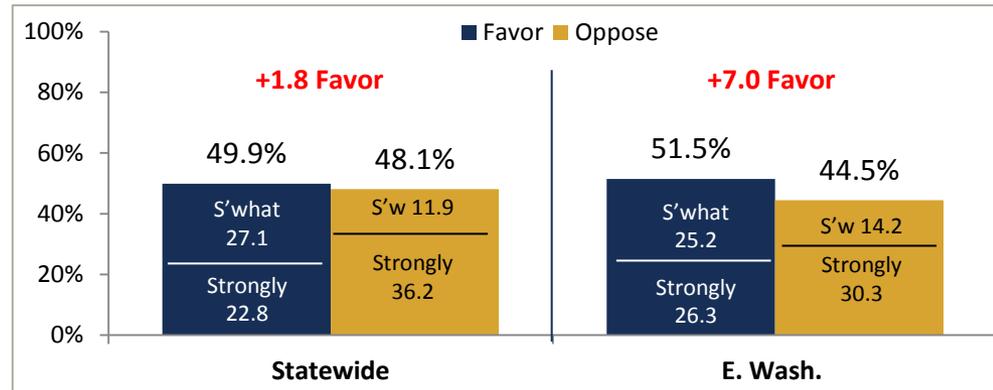


To the best of your knowledge, when private forest lands are harvested for timber, how often are trees replanted – always, almost always, some of the time, rarely or never?

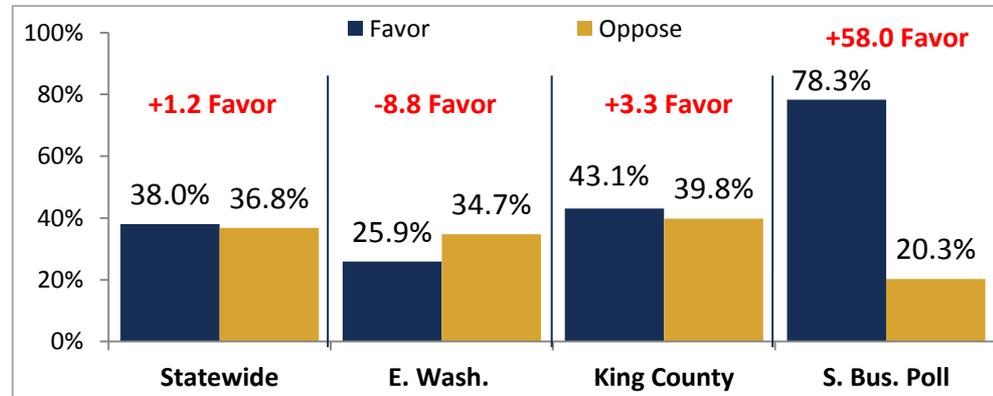


# TRANSPORTATION ISSUES IN WASHINGTON

Now, would you favor or oppose creating new tolls on some bridges and highways in Washington to fund new bridge construction and new road construction and maintenance?



Do you favor or oppose continued construction of the Highway 99 tunnel in downtown Seattle?



# EDUCATION IN WASHINGTON

Which of the following would you most support in order to help fund education?

1. Cutting spending for other state agencies and programs
2. Creating a state income tax
3. Increasing taxes like the sales tax or property taxes
4. Increasing taxes on Washington's businesses

	Statewide	E. Wash.	S. Bus.
Cutting Spending	42.4	48.9	19.4
Create State Income Tax	17.0	9.5	47.8
Increase Property or Sales Taxes	15.2	19.7	26.9
Increase Taxes on Businesses	11.4	9.5	3.0

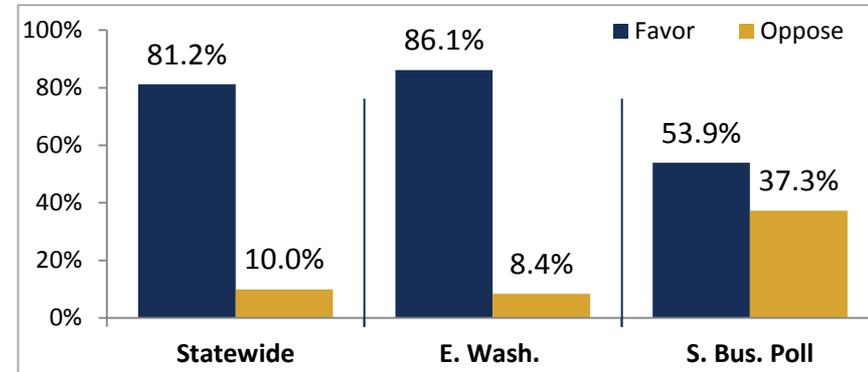
The legislature has recently been ruled in contempt for not fully funding basic education- what should the courts impose as punishment?

1. Nothing – the legislature, not the courts, should decide how education is funded
2. Force Legislators to pay individual fines
3. Freeze all state spending until basic education is funded
4. Send legislators to jail
5. Shut down public schools until they are funded

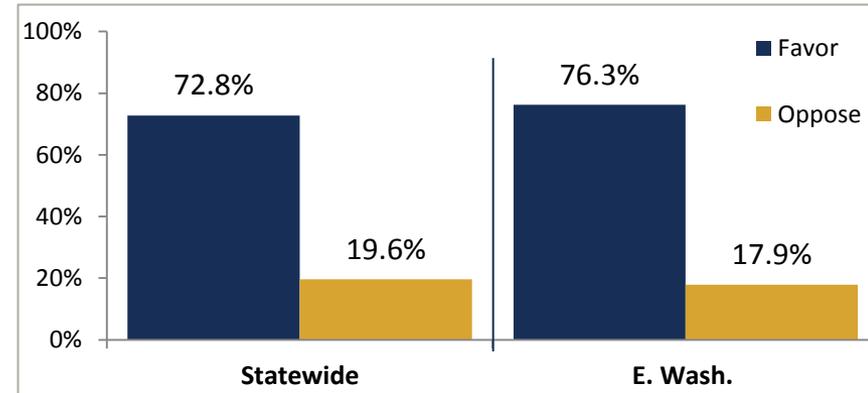
	Statewide	E. Wash.
Nothing	32.8	32.8
Pay Individual Fines	22.5	26.3
Freeze State Spending	21.6	19.0
Send Legislators to Jail	6.5	8.4
Shut Down Public Schools	3.3	4.4

# NEW MEDICAL SCHOOL IN EASTERN WASHINGTON

In general, would you favor or oppose Washington State University establishing a new medical school to increase the number of doctors who are educated and trained in the State of Washington?

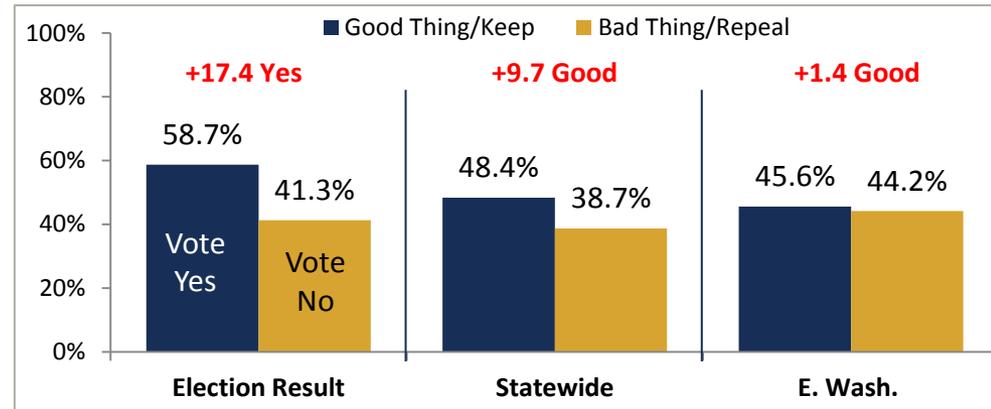


In order to establish a medical school at WSU, the university would require legislative approval along with initial state funding. If approved and funded during the next legislative session, medical students could begin class in fall of 2017. Knowing this, would you favor or oppose the Washington legislature approving and funding a new medical school at Washington State University?

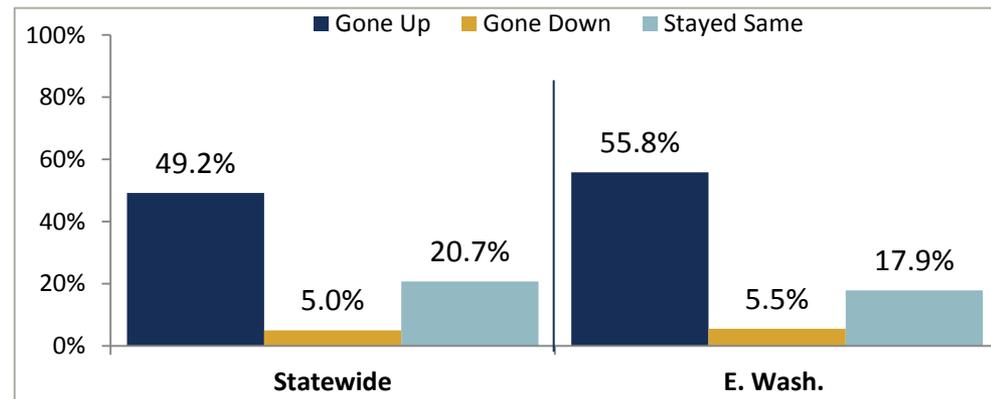


# STATE LIQUOR LAWS

Three years ago, voters passed Initiative 1183 which closed state liquor stores and allowed for private sales of liquor in the State of Washington. Please tell me, do you believe this law is a bad thing and should be repealed or do you think this law is a good thing and should remain in place?

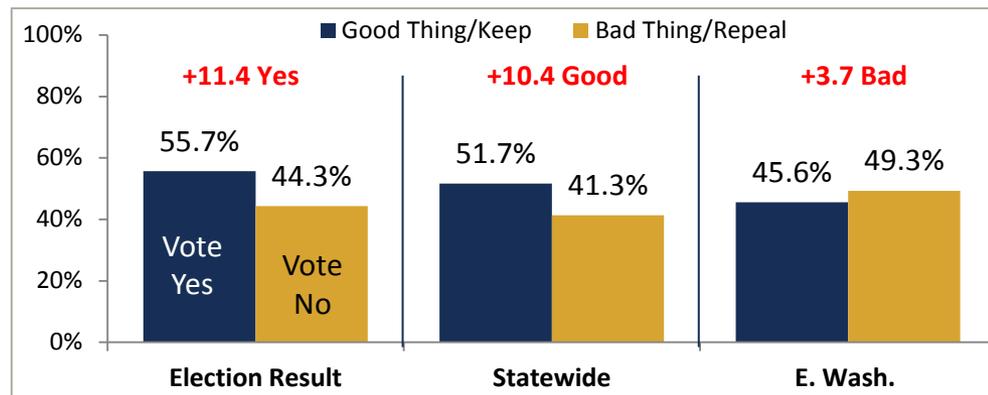


As far as you know, as a result of the new law allowing private liquor sales, do you believe the price of liquor in Washington has gone up, gone down or stayed about the same?

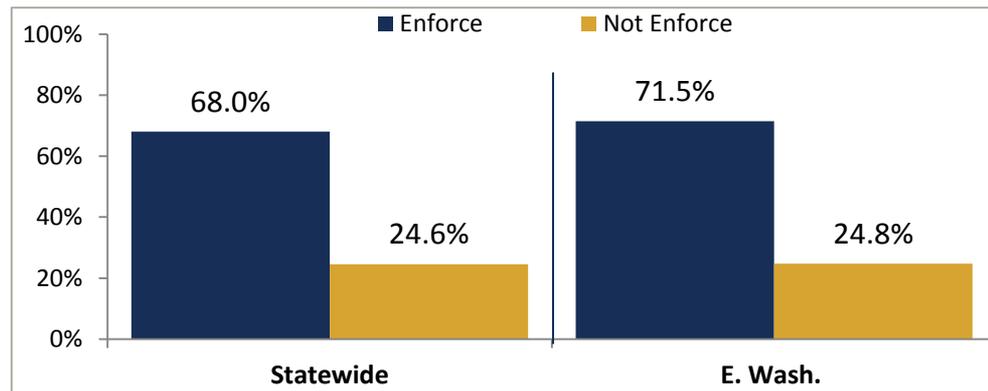


# STATE MARIJUANA LAWS

Two years ago, voters passed Initiative 502 which legalized recreational marijuana use in the State of Washington. Please tell me, do you believe this law is a bad thing and should be repealed or do you think this law is a good thing and should remain in place?

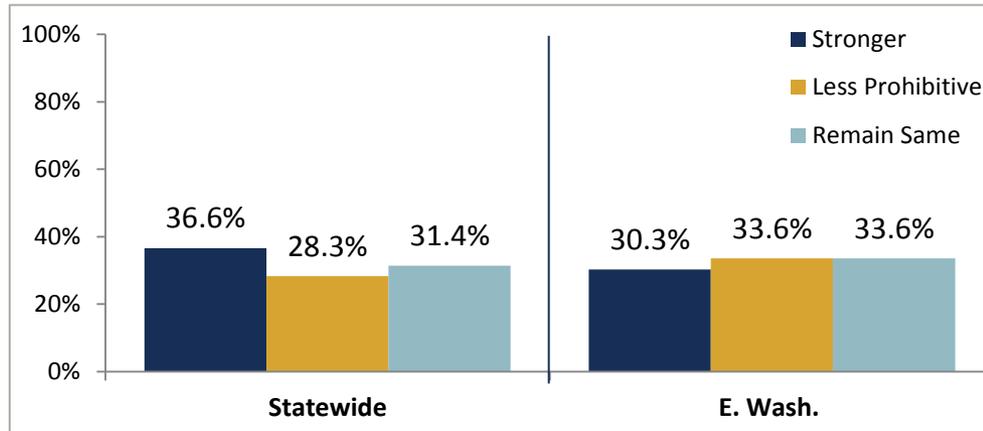


Current law prohibits marijuana use in public places. Some law enforcement agencies in the state have chosen to not enforce this part of the law. Knowing this, do you favor or oppose police enforcing the law against smoking marijuana in public?



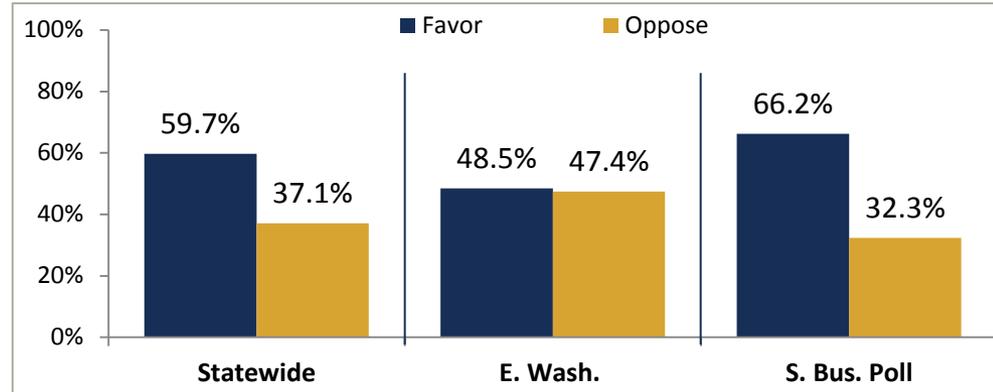
# STATE GUN LAWS

With the passage of Initiative 594, which mandates a background check on any person purchasing a gun, even if that purchase is through a private seller including purchases from gun shows, do you believe the laws on guns in Washington should be made stronger, be made less prohibitive, or remain the same?

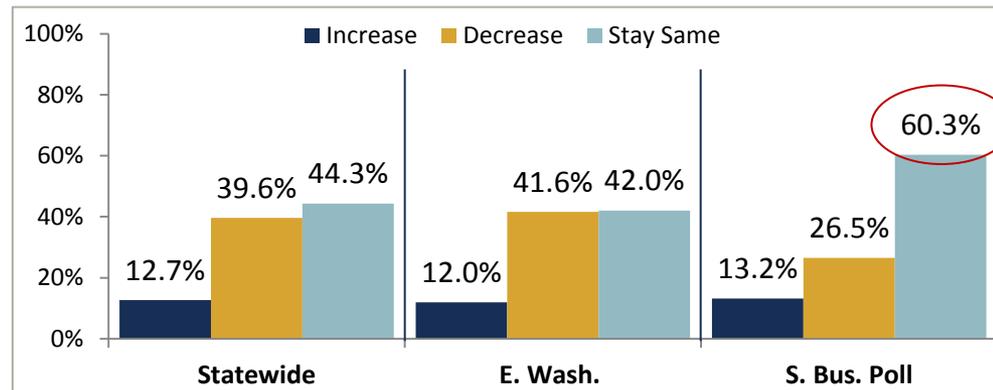


# WASHINGTON'S MINIMUM WAGE

Would you favor or oppose raising the state's minimum wage to \$12 per hour?

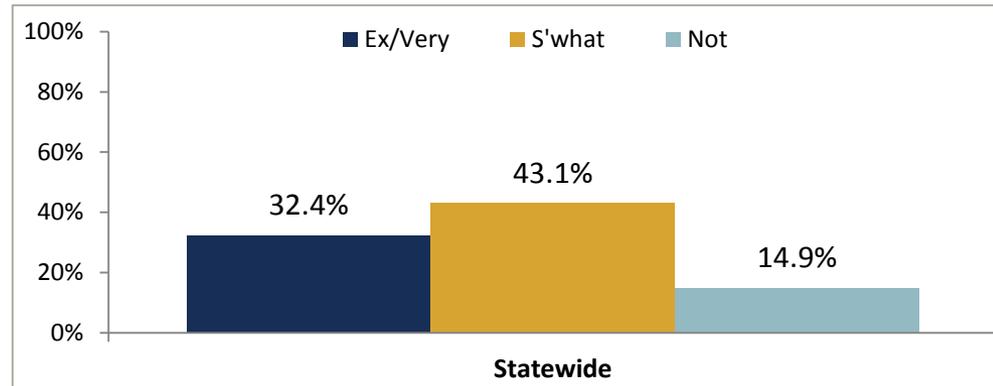


If the state's minimum wage were increased to \$12 per hour, do you think the number of jobs in Washington would increase, decrease or stay about the same?



# EBOLA THREAT

How prepared do you believe the state and hospitals are to handle cases of Ebola should they show up in Washington—extremely prepared, very prepared, somewhat prepared or not at all prepared?



Which of the following comes closest to your opinion:

1. The federal or state government **quarantining individuals** who have Ebola, or show symptoms of the illness, is a **good thing** in order to protect the community at large; or,
2. The federal or state government **quarantining individuals** who have Ebola, or show symptoms of the illness, is a **bad thing** because it infringes on a person's individual freedoms.

