



## Opinion Poll

### Arizona Small Business Owners Support 'All-of-the-Above' Energy Policy that Protects Public Lands

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**Small Business Majority**

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## Executive Summary

Small businesses are the lifeblood of our nation's workforce. We depend on them to keep local communities and economies thriving, which in turn boosts our national economy. But in the current fiscal climate, many of them are having a hard time turning a profit. Now is a better time than ever to help them get back on their feet, and scientific opinion polling reveals small business owners in Arizona believe protecting their region's natural assets is one way we can enhance the financial success of small businesses and local economies. Furthermore, a sizable majority of them find the president's 'all-of-the-above' energy development strategy appealing but would be even more supportive if it ensures protection of those public lands.

The poll reveals the important role public lands often play in small business owners' decisions to open businesses in Arizona. Forty-two percent agree that when choosing where to live and own a business, access to outdoor opportunities provided by parks and public lands is a large factor, with 1 in 4 *strongly* agreeing. Of all the reasons behind someone's decision about where to start a business, it speaks volumes that so many of them attribute a large part of their reason to public lands. Similarly, 35% of owners feel their state's national parks, forests, monuments and wildlife habitats are not only an essential part of the outdoor culture and quality of life, but also one of the reasons they do business there.

With regard to the president's proposal of an all-of-the-above energy strategy, which promotes development of various energy sources including solar, wind, natural gas, coal and more, a broad three-quarters are in favor. But this policy becomes even more attractive to them if it takes steps to ensure some areas remain accessible to visitors and free of development. Arizona owners are three times more likely than less to support an all-of-the-above strategy that takes that extra step.

With this in mind, it's not surprising three-quarters of small business owners in Arizona support designating additional public lands as national monuments, and 60% agree protecting public lands by designating new national monuments and national parks would positively impact small business opportunities tied to public lands. Seven in 10 Arizona small business owners believe protecting public lands would positively impact local jobs and the economy. In addition, 81% believe we can protect land and water, maintain a strong economy *and* create local jobs all at once.

This was not just a poll of owners whose income is related to outdoor activities. In fact, only 8% report their revenue is tied to open space in some way, such as selling outdoor equipment, offering bike tours or even just owning a business near a touristy outdoor area. Moreover, respondents were politically diverse: 55% identified as Republican or independent-leaning Republican, 30% identified as Democrat or independent-leaning Democrat and 11% identified as independent.

This poll reflects an Internet survey of 400 small business owners in Arizona, Colorado, Nevada and New Mexico, drawn from Research Now Panel and conducted by Greenberg Quinlan Rosner Research for Small Business Majority. There were 127 Arizona small business owners polled.

## Main Findings

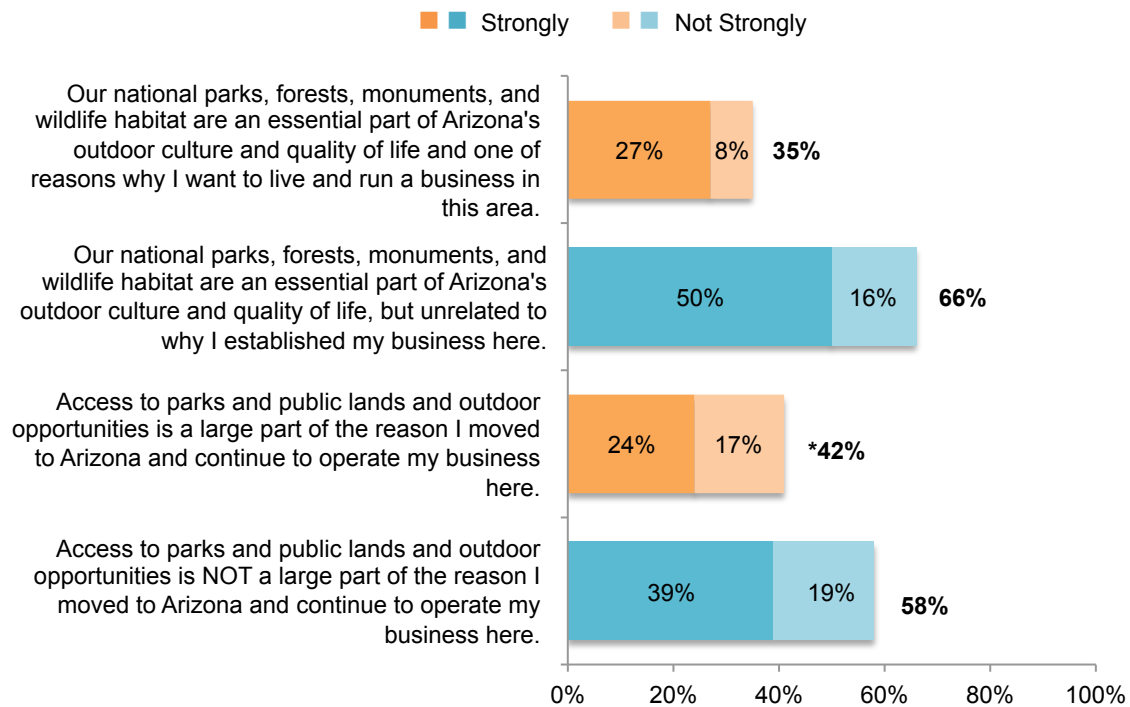
- **Of the myriad reasons to do business somewhere, more than 4 in 10 Arizona entrepreneurs choose to do business in the state because of opportunities tied to public lands:**  
42% agree access to parks, public lands and other outdoor opportunities is a large part of the reason they live and do business in Arizona, and one in four strongly agree. Additionally, more than one-third (35%) agree, with 27% *strongly* agreeing that Arizona's national parks, forests, monuments and wildlife habitats aren't just essential parts of the state's outdoor culture and quality of life, but also reasons to run a business there.
- **Arizona entrepreneurs support the president's 'all-of-the-above' approach for developing energy sources, especially if public lands are guaranteed protection:**  
Nearly three quarters, or 73%, support the Obama Administration's proposal for an 'all-of-the-above' energy policy that promotes development of various energy sources including solar, wind, biofuels, natural gas, oil and coal. If this strategy took an extra step to protect public lands, 60% would be more likely to support it. That's three times the number who would be less likely (21%).
- **Three-quarters support designating additional public lands as national monuments:**  
73% support designating more of Arizona's existing public lands as national monuments. Doing so would ensure natural areas and water in these regions would enjoy protections similar to those of Montezuma Castle, the Grand Canyon and the Petrified Forest in Arizona.
- **Small business owners believe protecting public lands would positively impact small business opportunities, local job growth, the Arizona economy and more:**  
68% of owners believe designating new national parks and monuments would enhance local jobs and the economy, and 60% say it would impact small business opportunities tied to public lands. In addition, the majority of them feel it would help Arizona attract and retain entrepreneurs and new business.
- **Entrepreneurs strongly believe public lands are important to the state's economy and that we can protect our land and water *and* have a vibrant economy and create jobs:**  
A vast 90% feel national parks, forests, monuments and wildlife areas are important to Arizona's economy and 81% agree it's possible to protect land and water, create jobs *and* maintain a strong economy.
- **The vast majority of respondents agree public lands that draw visitors positively impact local businesses, and they do *not* support allowing private development of these lands if it would limit the public's enjoyment of them:**  
A sweeping 89% believe public spaces drawing tourists can boost business for local restaurants, hotels, grocery stores and more, and two-thirds believe allowing more private companies to develop such lands would limit the public's enjoyment of them.
- **By nearly a 3:1 margin, small business owners in Arizona say their business is doing well, compared to those who say they aren't:**  
42% report their business is doing well, while only 15% say they're not doing well.
- **Respondents were diverse in industry and political affiliation:**  
91% of owners reported they do *not* generate revenue from activities tied to public lands; only 8% do. Two in five own businesses in the professional services industry, one in five own businesses in retail or wholesale and the rest own businesses in a variety of other industries. Additionally, 55% identified as Republican or independent-leaning Republican, 30% identified as Democrat or independent-leaning Democrat and 11% identified as independent.

## Small Businesses Believe Protecting Public Lands Brings Business to Arizona

Forty-two percent of small business owners agree that access to parks, public lands and other outdoor opportunities is a large part of the reason they live and do business in Arizona, and 24% *strongly* agree. Of all the possible reasons behind someone’s decision about where to start a business—affordable rent, an area well-known for talent and more—it speaks volumes that close to half attribute a large part of their reason to public lands. A similar 35% agree—1 in 4 strongly—that Arizona’s national parks, forests, monuments and wildlife habitats are essential parts of the state’s outdoor culture and quality of life, *in addition* to being a reason to run a business there.

**Figure 1: Four in 10 Arizona small business owners choose to do business there because of opportunities tied to public lands**

Please indicate which of these statements comes closer to your point of view, even if neither one is exactly right.



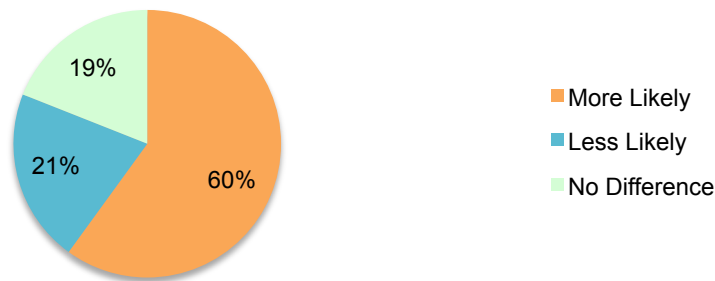
## Owners Favor 'All-of-the-Above' Energy Approach That Protects Public Lands; Support Establishing New National Monuments

There is a federal proposal, put forth by the Obama Administration and some members of Congress, to pursue an 'all-of-the-above' energy policy that promotes development of various energy sources including solar, wind, biofuels, natural gas, oil and coal. Seventy-three percent of owners support this proposal.

What's more, if an extra step were taken to protect public lands, 60% would be even more likely to support it. That's three times as many (21%) who would be less likely.

**Figure 2: Small businesses strongly support an 'all of the above' energy policy if it also protects public lands in Arizona**

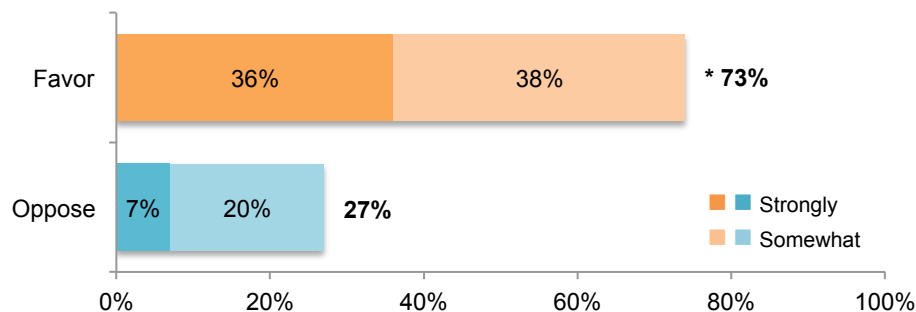
If this "all of the above" energy policy took an extra step to also include protecting public land so that some places in Arizona would remain open and accessible to visitors and free of development would you be more likely to support the "all of the above" energy policy from Congress and the Obama Administration, less likely to support this policy or would it make no difference either way?



Past presidents have taken steps to ensure protections for land and water in Arizona by designating some of the state's public lands as national monuments. Montezuma Castle, the Grand Canyon and the Petrified Forest are examples. When it comes to designating additional public lands as national monuments, a broad 73% of Arizona entrepreneurs are in support of doing so.

**Figure 3: Small businesses broadly support designating new national monuments in Arizona**

Now, some of the public lands in Arizona have been designated as National Monuments by past presidents, such as the Montezuma Castle National Monument, Grand Canyon and Petrified Forest, with protections for natural areas and water similar to those in national parks. Would you favor or oppose designating more of our existing public lands as national monuments?

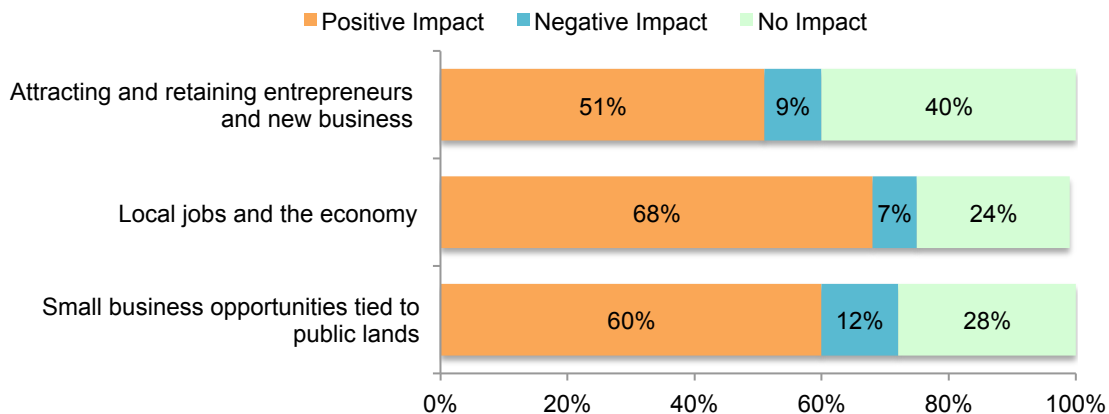


\* Numbers do not add up due to rounding.

In addition, 60% agree protecting public lands by designating new national monuments and national parks would positively impact small business opportunities tied to public lands, and 68% believe protecting public lands would positively impact local jobs and the economy. Moreover, the majority of small business owners agree it would help Arizona attract and retain entrepreneurs and new business.

■ **Figure 4: Small businesses believe protecting public lands in Arizona has a positive impact on small businesses, local jobs and the economy, among other issues**

Generally speaking, do you believe protecting public lands in Arizona by doing such things as designating new national parks and national monuments on existing public lands has a positive impact, negative impact, or no real impact on the following:

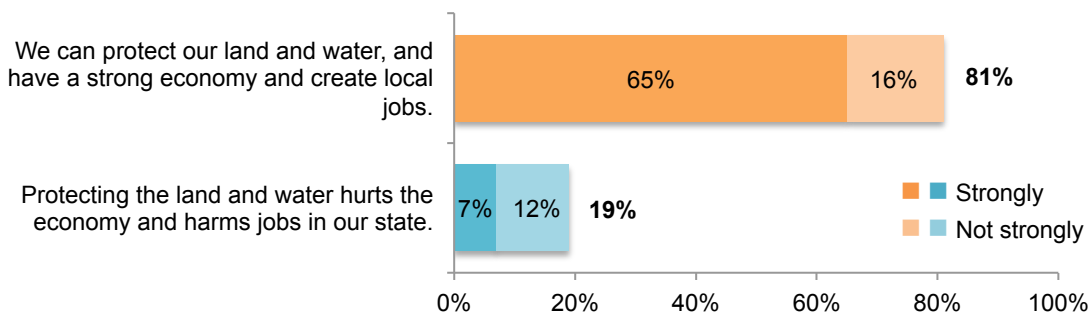


## Vast Majority Agree Preserving Public Lands is Good for Local Business, Jobs and the Economy; Oppose Excessive Development

With so many entrepreneurs saying monuments, national parks and the like are important to them and to their local economies, it's not surprising four in five owners believe we can protect land and water while maintaining a strong economy and creating local jobs.

■ **Figure 5: Small business owners strongly believe we can protect our land and water and have a strong economy and create local jobs**

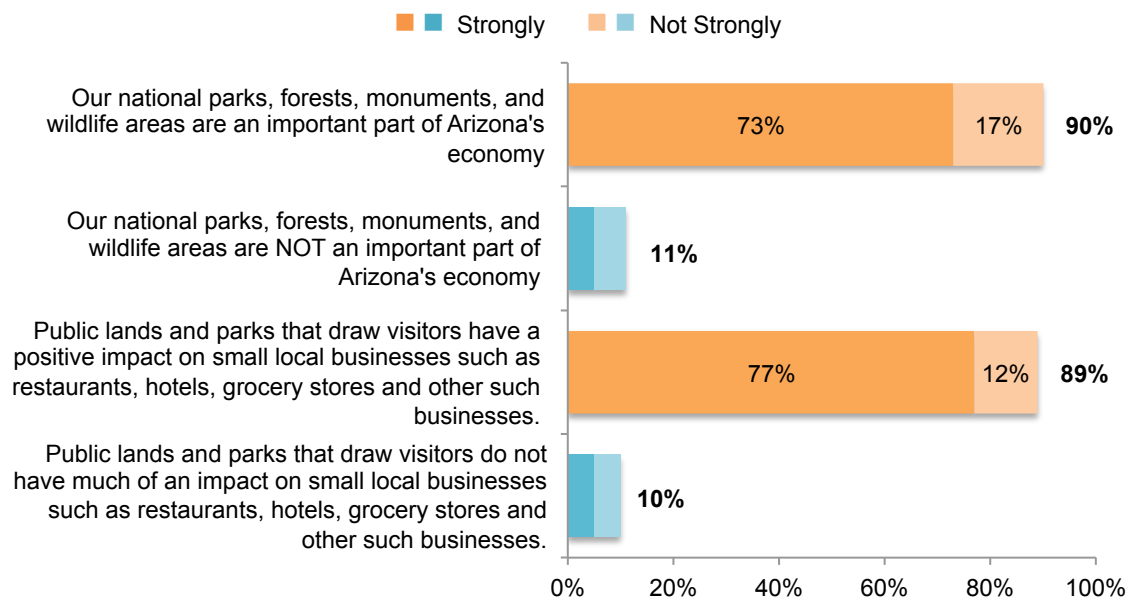
Which of the following statements comes closest to your own views, even if neither statement matches your views exactly?



A sweeping 90% feel that national parks, forests, monuments and wildlife areas are important to Arizona's economy. More specifically, 89% agree public lands and parks that draw tourists are good for business at local restaurants, hotels, grocery stores and more.

**Figure 6: Small business owners believe public lands and wildlife areas are an important part of Arizona's economy**

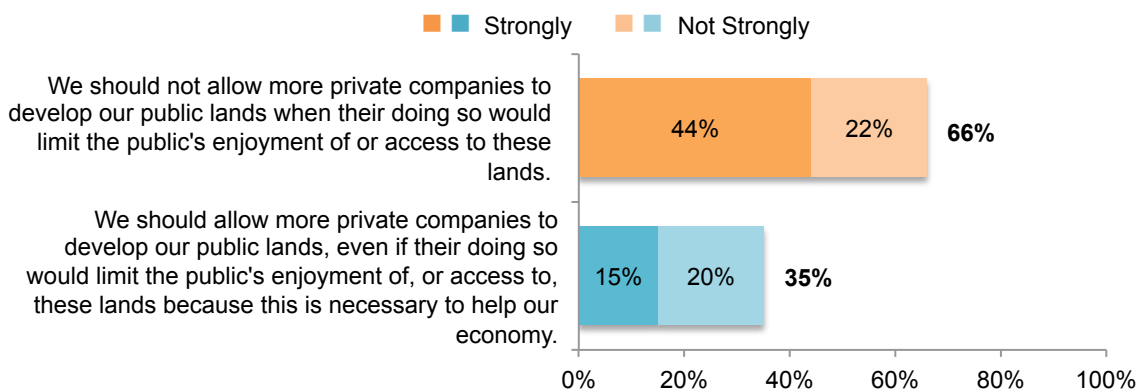
Please indicate which of these statements comes closer to your point of view, even if neither one is exactly right.



When it comes to developing Arizona's public lands, two-thirds agree private companies should not be allowed to develop such areas when doing so would limit the public's enjoyment of those spaces, and 63% feel designating new national parks and national monuments on existing public lands has a positive impact on controlling overdevelopment.

**Figure 7: Small businesses do not support allowing more private companies to develop public lands when doing so would limit the public's enjoyment of them**

Please indicate which of these statements comes closer to your point of view, even if neither one is exactly right.

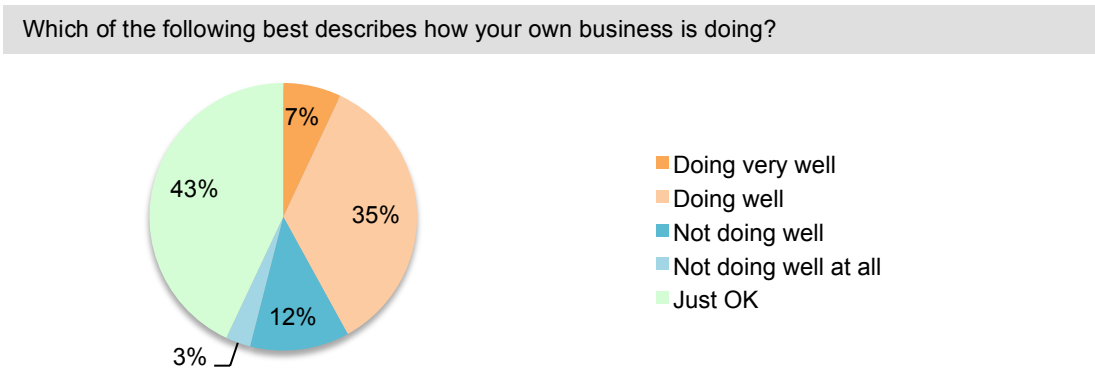




When asked about the impact protecting public lands would have on specific aspects of living in Arizona, 67% of small business owners felt it would positively impact clean air and water, 76% said quality of life would be preserved, 78% said protecting public lands would help maintain what's best about Arizona and 71% said it would protect their culture and heritage.

Arizona small business owners were also asked to gauge how their businesses are faring under current economic conditions. Forty-two percent believe their business is doing well and 43% say their business is at least doing OK, while only 15% say they're not doing well.

■ **Figure 8: By a 3:1 margin, small businesses in Arizona say their business is doing well, compared to business owners who say they are not doing well**



## Conclusion

Arizona small business owners, like many others across the nation, have been hit hard by the recession. However, they are expressing optimism about the future, and as they work to grow their businesses and bolster local economies, they need the support of small business-friendly, balanced energy policies—such as an ‘all-of-the-above’ energy approach that includes provisions to protect public lands. According to job creators across an array of industries, it’s good for business: poll results reveal the important role public lands play in close to half of entrepreneurs’ decisions to open businesses in Arizona. It’s evident small business owners have seen firsthand that protecting these lands can attract business. Small employers are the backbone of our economy and now is as good a time as any to help them, considering the current economic climate. Whether Arizona entrepreneurs are flourishing or working to get back on their feet, it’s important to ensure new energy policies preserve what makes their state’s communities and businesses unique and desirable—public lands.

## Methodology

This poll reflects an Internet survey of 400 small business owners in Arizona, Colorado, Nevada and New Mexico, drawn from Research Now Panel and conducted by Greenberg Quinlan Rosner Research for Small Business Majority. The survey was conducted from May 1-7, 2012. The overall margin of error is +/- 4.9%.

## Poll Toplines

May 1 – 7, 2012

400 Small business owners of 100 or fewer employees (Total)

127 Arizona small business owners

Q.3 Do you own your own business?

	<b>AZ</b>	<b>Total</b>
Yes.....	100	100
No .....	-	-
Not sure .....	-	-
(ref:SBOSCR)		

Q.4 How many people are directly employed by your business or company, including yourself?

	<b>AZ</b>	<b>Total</b>
1.....	25	25
2-5.....	54	52
6-10.....	11	10
11-25.....	6	9
26-50.....	2	2
51-100.....	3	2
More than 100.....	-	-
(ref:NUMEMPLY)		

Q.5 Which of the following statements comes closest to your own views, even if neither statement matches your views exactly?

We can protect our land and water, and have a strong economy and create local jobs.

OR

Protecting the land and water hurts the economy and harms jobs in our state.

	<b>AZ</b>	<b>Total</b>
First statement, strongly.....	65	65
First statement, not strongly.....	16	17
Second statement, not strongly.....	12	11
Second statement, strongly.....	7	7
(Don't know/refused).....	-	-
<b>Total First .....</b>	<b>81</b>	<b>81</b>
<b>Total Second.....</b>	<b>19</b>	<b>19</b>
<b>First - Second .....</b>	<b>63</b>	<b>63</b>
(ref:STATEMNT)		

Q.6 Please indicate which of these statements comes closer to your point of view, even if neither one is exactly right.

	1st Stmt Strng	1st Stmt NtStr	2nd Stmt NtStr	2nd Stmt Strng	Total 1st	Total 2nd	1st - 2nd
6 Our national parks, forests, monuments, and wildlife habitat are an essential part of (STATE'S) outdoor culture and quality of life and one of reasons why I want to live and run a business in this area. OR Our national parks, forests, monuments, and wildlife habitat are an essential part of (STATE'S) outdoor culture and quality of life, but unrelated to why I established my business here.							
<b>Arizona</b> .....	27	8	16	50	<b>35</b>	<b>65</b>	<b>-31</b>
<b>Total</b> .....	32	9	16	43	<b>40</b>	<b>60</b>	<b>-19</b>
7 Our national parks, forests, monuments, and wildlife areas are an important part of (STATE'S) economy. OR Our national parks, forests, monuments, and wildlife areas are NOT an important part of (STATE'S) economy							
<b>Arizona</b> .....	73	17	6	5	<b>90</b>	<b>10</b>	<b>80</b>
<b>Total</b> .....	71	18	7	4	<b>89</b>	<b>11</b>	<b>77</b>
8 We should not allow more private companies to develop our public lands when their doing so would limit the public's enjoyment of or access to these lands. OR We should allow more private companies to develop our public lands, even if their doing so would limit the public's enjoyment of, or access to, these lands because this is necessary to help our economy							
<b>Arizona</b> .....	44	22	20	15	<b>66</b>	<b>34</b>	<b>32</b>
<b>Total</b> .....	43	19	23	15	<b>63</b>	<b>37</b>	<b>25</b>
9 Public lands and parks that draw visitors have a positive impact on small local businesses such as restaurants, hotels, grocery stores and other such businesses. OR Public lands and parks that draw visitors do not have much of an impact on small local businesses such as restaurants, hotels, grocery stores and other such businesses.							
<b>Arizona</b> .....	77	12	5	5	<b>89</b>	<b>11</b>	<b>78</b>
<b>Total</b> .....	76	15	5	5	<b>90</b>	<b>10</b>	<b>81</b>
10 Access to parks and public lands and outdoor opportunities is a large part of the reason I moved to (STATE) and continue to operate my business here. OR Access to parks and public lands and outdoor opportunities is NOT a large part of the reason I moved to (STATE) and continue to operate my business here.							
<b>Arizona</b> .....	24	17	19	39	<b>42</b>	<b>58</b>	<b>-17</b>
<b>Total</b> .....	30	18	20	32	<b>48</b>	<b>52</b>	<b>-3</b>

(ref:VALUESo6)

Q.11 Generally speaking, do you believe protecting public lands in (STATE) by doing such things as designating new national parks and national monuments on existing public lands has a positive impact, negative impact, or no real impact on the following:

	<b>Pos Imp</b>	<b>Neg Imp</b>	<b>No Imp</b>	<b>Pos - Neg</b>
11 Small business opportunities tied to public lands				
<b>Arizona</b> .....	60	12	28	<b>49</b>
<b>Total</b> .....	57	14	28	<b>43</b>
12 Local jobs and the economy				
<b>Arizona</b> .....	68	7	24	<b>61</b>
<b>Total</b> .....	65	12	23	<b>53</b>
13 Attracting and retaining high quality workers to the state				
<b>Arizona</b> .....	49	4	47	<b>45</b>
<b>Total</b> .....	48	5	47	<b>43</b>
14 The quality of life				
<b>Arizona</b> .....	76	4	20	<b>72</b>
<b>Total</b> .....	77	4	18	<b>73</b>
15 Protecting clean air and water				
<b>Arizona</b> .....	67	4	29	<b>64</b>
<b>Total</b> .....	72	4	24	<b>69</b>
16 Controlling overdevelopment				
<b>Arizona</b> .....	63	12	26	<b>51</b>
<b>Total</b> .....	61	13	26	<b>48</b>
17 Maintaining what is best about (STATE)				
<b>Arizona</b> .....	78	3	19	<b>75</b>
<b>Total</b> .....	76	5	20	<b>71</b>
18 Protecting our culture and heritage				
<b>Arizona</b> .....	71	3	26	<b>68</b>
<b>Total</b> .....	72	4	25	<b>68</b>
19 Attracting and retaining entrepreneurs and new business				
<b>Arizona</b> .....	51	9	40	<b>42</b>
<b>Total</b> .....	52	11	37	<b>41</b>

(ref:REGIMPCT)

[266 Respondents]

Q.20 (ASK IN NV, NM AND AZ) Now, some of the public lands in (STATE) have been designated as National Monuments by past presidents, such as ((IN AZ) the Montezuma Castle National Monument, Grand Canyon and Petrified Forest) (IN NV the Great Basin) (NM: El Malpais, Bandelier, and Tent Rocks National Monuments) with protections for natural areas and water similar to those in national parks. Would you favor or oppose designating more of our existing public lands as national monuments?

	<b>AZ</b>	<b>Total</b>
Strongly favor .....	36	33
Somewhat favor .....	38	41
Somewhat oppose.....	20	18
Strongly oppose .....	7	7
(Don't know/refused) .....	-	-
<b>Total Favor .....</b>	<b>73</b>	<b>75</b>
<b>Total Oppose .....</b>	<b>27</b>	<b>25</b>
<b>Favor - Oppose .....</b>	<b>47</b>	<b>49</b>
(ref:MONU1)		

Q.22 As you may have heard, some in Congress and the Obama administration are calling for an "all of the above" energy policy that promotes development of a diverse mix of energy resources, including solar, wind, biofuels, natural gas, oil and coal. This policy would include opening up more land for drilling, as well as continued investments in clean energy. Generally speaking, do you favor or oppose this energy policy?

	<b>AZ</b>	<b>Total</b>
Strongly favor .....	22	23
Somewhat favor .....	51	51
Somewhat oppose.....	17	17
Strongly oppose .....	10	9
(Don't know/refused) .....	-	-
<b>Total Favor .....</b>	<b>73</b>	<b>74</b>
<b>Total Oppose .....</b>	<b>27</b>	<b>26</b>
<b>Favor - Oppose .....</b>	<b>45</b>	<b>48</b>
(ref:ALLLABOV)		

Q.23 If this "all of the above" energy policy took an extra step to also include protecting public land so that some places in (STATE) would remain open and accessible to visitors and free of development would you be more likely to support the "all of the above" energy policy from Congress and the Obama Administration, less likely to support this policy or would it make no difference either way?

	<b>AZ</b>	<b>Total</b>
Much more likely.....	28	25
Somewhat more likely .....	32	34
Somewhat less likely .....	13	13
Much less likely .....	9	9
No Difference.....	19	20
(Not sure/refused).....	-	-
<b>Total More Likely .....</b>	<b>60</b>	<b>58</b>
<b>Total Less Likely.....</b>	<b>21</b>	<b>22</b>
<b>More Likely - Less Likely .....</b>	<b>38</b>	<b>36</b>
(ref:ALABOV2)		

Q.24 These last questions are for statistical purposes only: Which of the following categories best describes your business?

	<b>AZ</b>	<b>Total</b>
Professional services .....	40	44
Retail or wholesale .....	18	19
Education, health care or a non-profit organization.....	3	2
Construction .....	5	4
Industry or manufacturing.....	4	4
Transportation or utilities.....	2	2
Agriculture.....	-	1
Food services or production.....	4	3
Other (write in).....	23	20
(Refused) .....	-	-

(ref:BUSTYPE)

Q.25 Does your business generate revenue from activities tied to public lands? Some examples would include selling outdoor equipment, offering kayaking or mountain bike tours or owning a business that relies on tourism due to a nearby park or public land recreation area like a restaurant, gas station or hotel?

	<b>AZ</b>	<b>Total</b>
Yes.....	8	11
No .....	91	89
(Don't know/refused).....	1	-

(ref:RECBUS)

Q.26 Do you belong to any of the following business organizations? Please check all that apply.

	<b>AZ</b>	<b>Total</b>
A trade association in your industry .....	37	39
Other business organization .....	22	24
Your local chamber of commerce.....	9	16
National Federation of Independent Business .....	5	4
The U.S. Chamber of Commerce.....	2	2
None .....	46	42

(ref:ORGTYPE)

Q.27 In what year were you born?

	<b>AZ</b>	<b>Total</b>
18 - 24 .....	-	0
25 - 29 .....	2	1
30 - 34 .....	1	3
35 - 39 .....	3	4
40 - 44.....	7	6
45 - 49 .....	12	13
50 - 54 .....	18	18
55 - 59 .....	16	15
60 - 64.....	17	16
65 and over .....	23	23
(No answer) .....	-	-

(ref:AGE)

Q.28 How long have you lived in (STATE)?

	<b>AZ</b>	<b>Total</b>
1-5 years .....	11	11
6-12 years.....	20	20
13-20 years .....	22	21
More than 20 years, but not your whole life.....	39	38
Your whole life.....	6	11
(Don't know/refused) .....	-	-
(ref:LOCAL)		

Q.29 Generally speaking, do you think of yourself as a Republican, a Democrat, an Independent, or something else?

	<b>AZ</b>	<b>Total</b>
Democrat .....	20	21
Independent-lean Democrat .....	10	10
Independent .....	11	12
Independent-lean Republican .....	13	15
Strong Republican .....	42	38
Other.....	5	3
Refused .....	-	-
(ref:PTYID1)		

Q.32 Which of the following best describes how your own business is doing?

	<b>AZ</b>	<b>Total</b>
Doing very well.....	7	8
Doing well.....	35	32
Just OK .....	43	45
Not doing well .....	12	10
Not doing well at all.....	3	4
<b>Total Well.....</b>	<b>42</b>	<b>40</b>
<b>Total Not Well .....</b>	<b>15</b>	<b>15</b>
(ref:OWNBUS)		

Q.2 What is your gender?

	<b>AZ</b>	<b>Total</b>
Male .....	60	60
Female .....	40	40
(ref:GENDER)		