
CONFIDENTIAL

CBRT California Business Leader Study
M4 Strategies
Sample: 1142 California Business Leaders
Mode: Online
Fielding Dates: 11/06/2012-12/26/2012
TOPLINE FINAL

Data weighted by industry, geography, business size, and minority ownership to reflect the California business community

Thank you for participating in the California Business Roundtable's Annual Business Leader Study. Your participation is critical in helping shape the future of our state. Please complete the survey as soon as possible. The survey will take about 15 minutes to complete.

PLEASE NOTE YOUR RESPONSES WILL BE KEPT COMPLETELY CONFIDENTIAL. To protect the integrity of the study, we will ask up front for an email address. This will not be used for marketing purposes and will not be reported with the final results.

1. Overall, do you think things in California are going in the right direction, or do you think things have gotten off on the wrong track?

Right direction	32.1%
Wrong track	67.9%

2. Are the results of the November 6, 2012 election likely to have an impact on your or your company's plans to expand and/or create jobs in California?

Strongly likely to have a negative impact on plans to expand and/or create jobs in CA	35.2%
Somewhat likely to have a negative impact on plans to expand and/or create jobs in CA	15.8%
Negative impact	50.9%
Positive impact	22.7%
Somewhat likely to have a positive impact on plans to expand and/or create jobs in CA	14.1%
Strongly likely to have a positive impact on plans to expand and/or create jobs in CA	8.6%
Will have no impact on plans to expand and/or create jobs in CA	26.4%

3. How would you rate California's economy compared to the rest of the country?

Much better	3.8%
Somewhat better	14.4%
Better	18.3%
Neither better nor worse	19.6%
Worse	62.1%
Somewhat worse	33.9%
Much worse	28.2%

4. Thinking about next year, do you see California's economy getting better, getting worse, or will it stay the same?

It will get much better	5.0%
It will get a little better	31.0%
Better	36.0%
It will stay about the same	21.5%
Worse	42.5%
It will get a little worse	20.8%
It will get much worse	21.7%

5. Do you think it is easier to do business in California than in other states?

Much easier	2.3%
Somewhat easier	8.0%
Easier	10.3%
About the same	13.2%
Harder	69.3%
Somewhat harder	21.8%
Much harder	47.4%
I don't know	7.3%

6. Which of the following most closely describes your industry sector:

Agriculture	0.7%
Mining	0.2%
Construction	9.3%
Manufacturing	4.3%
Wholesale trade	7.2%
Retail trade	10.3%
Transportation and utilities	2.9%
Information	1.9%
Broadcasting and motion pictures & sound recording	0.9%
Financial and insurance activities	3.8%
Real estate	5.2%
Professional and business services	22.7%
Health services	5.9%
Leisure and hospitality services	5.3%
Other services	13.7%
Other	5.8%

7. How many employees does your company employ in California?

1-9	78.8%
10-19	9.4%
20-99	8.2%
100-499	2.0%
500-999	1.1%
1000+	0.1%
Don't know/I can't say	0.3%

8. Does your company have a physical presence in other states?

Yes	12.1%
No	86.5%
Don't know/I can't say	1.4%

9. [If Q8 is "Yes"] What sort of physical presence does your company have outside of California?
[Check all that apply]

Agriculture	1.5%
Mining	1.8%
Construction	7.0%
Manufacturing	16.8%
Wholesale trade	17.3%
Retail trade	6.4%
Transportation and utilities	4.3%
Information	2.8%
Broadcasting and motion pictures & sound recording	1.4%
Financial and insurance activities	7.4%
Real estate	10.5%
Professional and business services	22.5%
Health services	4.5%
Leisure and hospitality services	4.4%
Other services	14.8%
Other	3.8%

10. Many business leaders, such as you, have identified challenges currently facing California's business community. What would you say is the biggest challenge to doing business in California?

Labor regulations	5.0%
Environmental regulations/permits	8.8%
Other government regulations/permits	12.7%
Energy costs	3.0%
Infrastructure quality	1.4%
Employee/labor costs	8.2%
Taxes	25.5%
Business/property costs	10.0%
Government finances/spending	9.9%
Quality of education system	4.8%
Civil litigation	2.1%
None of these/Something else	8.8%

10a. [If Q10 – None of these/Something else] What do you think is the biggest challenge to doing business in California? [OPEN ENDED]

11. [If Q10 is “Labor regulations”] What specifically would you say is the biggest challenge?

Too many state government labor regulations	39.7%
Too many local government labor regulations	0.0%
Not enough flexibility in labor laws	26.6%
High cost of state labor law compliance	26.0%
Too many employees subject to overtime/meal and rest periods	2.1%
None of these/Something else	5.6%

[If “None of these/Something else” for Q11] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 “Environmental regulations/permits”] What specifically would you say is the biggest challenge?

CEQA challenges in expanding or building new facilities	9.2%
AB32 (greenhouse gas emission reduction requirements) compliance/implementation costs	31.2%
Proposed Green Chemistry regulations	2.1%
Constantly changing environmental rules	18.8%
Overlapping oversight agencies	14.5%
State requirements exceed federal standards	21.9%
None of these/Something else	2.2%

[If “None of these/Something else” for previous item] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 is “Other regulations/permits”] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 is “Energy costs”] What specifically would you say is the biggest challenge?

High electricity costs	31.2%
High gas/diesel costs	64.2%
High natural gas costs	1.6%
High cost of other energy	3.0%
None of these/Something else	0.0%

[If “None of these/Something else” for previous item] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 is Infrastructure quality] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 is “Employee/labor costs”] What specifically would you say is the biggest challenge?

High cost of health care/health insurance	35.7%
Difficulty in hiring and maintaining a qualified work force	17.8%
High labor costs	26.6%
High cost of housing	10.1%
Overtime rules	2.4%
None of these/Something else	7.3%

[If “None of these/Something else” for previous item] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 is “Taxes”] What specifically would you say is the biggest challenge?

High state taxes	41.9%
High local taxes	4.3%
High state fees	7.5%
High local fees	0.7%
High personal income taxes	17.4%
Manufacturing and equipment sales tax	1.1%
Always a threat of new taxes	24.2%
None of these/Something else	3.0%

[If “High state taxes/High local taxes/High state fees/High local fees” in previous item] Can you name a specific tax or fee that is challenging your business? [Open Ended]

[If “None of these/Something else” in second to last item] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 is “Business/property costs”] What specifically would you say is the biggest challenge?

Access to capital/ability to get a loan	54.0%
Something else	46.0%

[If “Something else” in previous item] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 is “Government finances/spending”] What specifically would you say is the biggest challenge?

State budget deficit	35.1%
Long term state debt and unfunded liabilities	60.6%
None of these/Something else	4.3%

[If “None of these/Something else” for previous item] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 is “Education system”] What specifically would you say is the biggest challenge?

Poor quality K-12 education system	41.6%
Poor quality higher education system, including the UC system, the Cal State system and the Community College system	8.5%
High cost and limited access to higher education	28.4%
Resistance to reforms from teacher unions and/or education bureaucracy	4.6%
Inadequate vocational education	11.0%
None of these/Something else	5.8%

[If “None of these/Something else” for previous item] What specifically would you say is the biggest challenge? [Open Ended]

[If Q10 is “Civil litigation”] What specifically would you say is the biggest challenge?

High cost of litigation	21.3%
High risk of litigation	38.9%
High cost of litigation for labor law compliance	4.0%
Overly permissive class action certification	0.0%
Inability to quickly eliminate frivolous lawsuits	31.6%
Too many private attorney general or unfair competition actions	0.0%
ADA lawsuits	0.0%
None of these/Something else	4.2%

[If “None of these/Something else” for previous item] What specifically would you say is the biggest challenge? [Open Ended]

12. And what would you say is the second biggest challenge to doing business in California?

Labor regulations	7.7%
Environmental regulations/permits	6.2%
Other government regulations/permits	13.7%
Energy costs	6.5%
Infrastructure quality	3.6%
Employee/labor costs	10.2%
Taxes	17.4%
Business/property costs	11.2%
Government finances/spending	11.3%
Quality of education system	4.3%
Civil litigation	3.6%
None of these/Something else	4.4%

12a. [If “None of these/Something else” for previous item] What do you think is the second biggest challenge to doing business in California? [Open Ended]

13. [If Q12 is “Labor regulations/permits”] What specifically would you say is the second biggest challenge?

Too many state government labor regulations	24.4%
Too many local government labor regulations	3.5%
Not enough flexibility in labor laws	23.4%
High cost of state labor law compliance	33.6%
Too many employees subject to overtime/meal and rest periods	11.7%
None of these/Something else	3.4%

[If Q13 is “None of these/Something else”] What specifically would you say is the biggest challenge? [Open Ended]

[If Q12 is “Environmental regulations/permits”] What specifically would you say is the second biggest challenge?

CEQA challenges in expanding or building new facilities	2.7%
AB32 (greenhouse gas emission reduction requirements) compliance/implementation costs	19.3%
Proposed Green Chemistry regulations	6.1%
Constantly changing environmental rules	12.9%
Overlapping oversight agencies	14.2%
State requirements exceed federal standards	34.4%
None of these/Something else	10.4%

[If “None of these/Something else” to previous item] What specifically would you say is the biggest challenge? [Open Ended]

[If Q12 is “Other regulations”] What specifically would you say is the second biggest challenge? [Open Ended]

[If Q12 is “Energy costs”] What specifically would you say is the second biggest challenge?

High electricity costs	48.1%
High gas/diesel costs	43.9%
High natural gas costs	2.1%
High cost of other energy	2.9%
None of these/Something else	3.1%

[If “None of these/Something else” to previous item] What specifically would you say is the second biggest challenge? [Open Ended]

[If Q12 is “Infrastructure”] What specifically would you say is the second biggest challenge? [Open Ended]

[If Q12 is “Employee/labor costs”] What specifically would you say is the second biggest challenge?

High cost of health care/health insurance	32.5%
Difficulty in hiring and maintaining a qualified work force	11.2%
High labor costs	38.5%
High cost of housing	5.0%
Overtime rules	2.9%
None of these/Something else	9.9%

[If “None of these/Something else” for previous item] What specifically would you say is the second biggest challenge? [Open Ended]

[If Q12 is “Taxes”] What specifically would you say is the second biggest challenge?

High state taxes	33.3%
High local taxes	8.3%
High state fees	8.1%
High local fees	3.0%
High personal income taxes	13.1%
Manufacturing and equipment sales tax	3.9%
Always a threat of new taxes	26.4%
None of these/Something else	3.9%

[If “High state taxes/High local taxes/High state fees/High local fees” for previous item] Can you name a specific tax or fee that is challenging your business? [Open Ended]

[If “None of these/Something else” for second to last item] What specifically would you say is the biggest challenge? [Open Ended]

[If Q12 is “Business/property costs”] What specifically would you say is the second biggest challenge?

Access to capital/ability to get a loan	40.3%
Something else	59.7%

[If “Something else” for previous item] What specifically would you say is the second biggest challenge? [Open Ended]

[If Q12 is “Government finances/spending”] What specifically would you say is the second biggest challenge?

State budget deficit	30.0%
Long term state debt and unfunded liabilities	68.6%
None of these/Something else	1.4%

[If “None of these/Something else” to previous item] What specifically would you say is the second biggest challenge? [Open Ended]

[If Q12 is “Education system”] What specifically would you say is the biggest challenge?

Poor quality K-12 education system	32.1%
Poor quality higher education system, including the UC system, the Cal State system and the Community College system	6.0%
High cost and limited access to higher education	33.7%
Resistance to reforms from teacher unions and/or education bureaucracy	21.7%
Inadequate vocational education	4.4%
None of these/Something else	2.1%

[If “None of these/Something else” to previous item] What specifically would you say is the second biggest challenge? [Open Ended]

[If Q12 is “Civil litigation”] What specifically would you say is the biggest challenge?

High cost of litigation	22.6%
High risk of litigation	24.6%
High cost of litigation for labor law compliance	4.4%
Overly permissive class action certification	3.8%
Inability to quickly eliminate frivolous lawsuits	34.2%
Too many private attorney general or unfair competition actions	2.6%
ADA lawsuits	7.8%
None of these/Something else	0.0%

[If “None of these/Something else” to previous item] What specifically would you say is the second biggest challenge? [Open Ended]

14. Many business leaders, such as you, have identified advantages to doing business in California. What would you say is the biggest advantage to doing business in California?

Climate/weather	36.6%
Quality of life	19.7%
California is a leader in key industries	5.3%
Culture of innovation/research and development	7.3%
Access to the California market	10.0%
Access to the Asian Pacific market	1.0%
Ethnic and cultural diversity	6.2%
Availability of qualified and skilled workers	3.4%
Availability of transportation and logistical infrastructure	1.1%
Support of state government such as worker training credits, enterprise zones	1.1%
Support of local government, i.e. incentives	1.1%
Access to higher education resources	0.9%
None of these/Something else	6.4%

What would you say is the biggest advantage of doing business in California? [Open Ended]

15. And what would you say is the second biggest advantage to doing business in California?
[exclude previous list choice]

Climate/weather	21.1%
Quality of life	21.1%
California is a leader in key industries	7.6%
Culture of innovation/research and development	7.4%
Access to the California market	11.0%
Access to the Asian Pacific market	1.7%
Ethnic and cultural diversity	8.1%
Availability of qualified and skilled workers	4.3%
Availability of transportation and logistical infrastructure	3.9%
Support of state government such as worker training credits, enterprise zones	1.2%
Support of local government, i.e. incentives	1.4%
Access to higher education resources	2.8%
None of these/Something else	8.4%

16. What is the outlook for your company over the next year?

It will get much better	10.4%
It will get a little better	30.4%
Better	40.8%
It will stay about the same	32.2%
Worse	22.5%
It will get a little worse	14.0%
It will get much worse	8.5%
I don't know	4.5%

17. Overall, has your company added or reduced jobs in California over the past year? [Check all that apply]

Added employees	13.1%
Added non-employee contract jobs	6.2%
No change	59.2%
Reduced employees	20.0%
Reduced non-employee contract jobs	5.6%
Don't know/I can't say	1.5%

18. Overall, has your company increased or reduced investment in your California operations in the past year?

Greatly increased California investment	3.6%
Slightly increased California investment	18.2%
Increased	21.8%
No change	48.3%
Reduced	27.8%
Slightly reduced California investment	15.0%
Greatly reduced California investment	12.8%
Don't know/I can't say	2.2%

19. Overall, has your company added or reduced jobs outside California over the past year?
[Check all that apply]

Added employees	6.4%
Added non-employee contract jobs	3.8%
No change	36.8%
Reduced employees	4.2%
Reduced non-employee contract jobs	1.8%
Don't know/I can't say	0.7%
No operations outside California	52.4%

20. Overall, has your company increased or reduced investment in your operations outside California in the past year?

Greatly increased outside California	2.7%
Slightly increased outside California	8.0%
Increased	10.7%
No change	27.6%
Reduced	6.6%
Slightly reduced outside California	3.7%
Greatly reduced outside California	2.9%
Don't know/I can't say	1.4%
No operations outside California	53.7%

21. Overall, does your company plan to add jobs outside California in 2013? [Check all that apply]

Add employees	7.6%
Add non-employee contract jobs	7.6%
No change	28.5%
Reduce employees	1.7%
Reduce non-employee contract jobs	0.5%
Don't know/I can't say	5.5%
No operations outside California	53.2%

22. Overall, does your company plan to increase or decrease investment in operations outside California in 2013?

Greatly increase	4.8%
Slightly increase	11.9%
Increase	16.7%
No change	23.5%
Decrease	3.9%
Slightly decrease	2.4%
Greatly decrease	1.5%
Don't know	4.0%
No operations outside California	51.9%

23. Does your company plan to add or reduce jobs in California in 2013? [Check all that apply]

Add employees	14.0%
Add non-employee contract jobs	10.1%
No change	55.2%
Reduce employees	12.4%
Reduce non-employee contract jobs	3.2%
Don't know/I can't say	10.6%

24. Overall, does your company plan to increase or decrease investment in operations in California in 2013?

Greatly increase	3.3%
Slightly increase	24.1%
Increase	27.5%
No change	45.1%
Decrease	19.5%
Slightly decrease	12.3%
Greatly decrease	7.2%
Don't know	7.9%

25. [(Reduced CA jobs/investment) Q23 Reduce employees/Reduce non-employee contract jobs OR Q24 Slightly decrease/Greatly decrease] Is your company planning to reduce jobs and or investment in California because of [Check all that apply]

Permitting challenges	15.9%
Regulator climate	29.1%
High cost of business	64.9%
Uncertainty regarding state government decisions	42.4%
Something else/Can't say	11.6%

26. [Plan to reduce jobs in CA in 2013 If Q23 is Reduce employees/Reduce non-employee contract jobs] Is your company planning to move those reduced California jobs in 2013 to another state or country? PLEASE NOTE, YOUR RESPONSE IS COMPLETELY CONFIDENTIAL AND FOR RESEARCH PURPOSES ONLY.

Yes, other states	10.9%
Yes, other countries	11.6%
Yes, both	14.3%
No	63.2%

27. [Plan to move reduced CA jobs to another state if Q26 is Yes other states/Yes other countries/Yes, both] Can you tell us why your company is planning to relocate jobs from California in 2013 to another state or country and where are you relocating? YOUR ANSWER IS COMPLETELY CONFIDENTIAL. [Open Ended]

28. Generally speaking, do you think of state government and state elected officials as helpful for growing your business, or do you consider them more of an obstacle you must overcome?

Very helpful	2.3%
Somewhat helpful	9.5%
Helpful	11.8%
Neither helpful nor an obstacle	23.5%
Obstacle	61.3%
A limited obstacle	20.7%
A significant obstacle	40.6%
I don't know/I can't say	3.3%

29. Generally speaking, do you think of local government and local elected officials as helpful for growing your business, or do you consider them more of an obstacle you must overcome?

Very helpful	3.0%
Somewhat helpful	14.4%
Helpful	17.4%
Neither helpful nor an obstacle	30.5%
Obstacle	48.7%
A limited obstacle	24.9%
A significant obstacle	23.7%
I don't know/I can't say	3.5%

30. Why do you see the state as [helpful/an obstacle in] growing your business? [Open Ended]

31. Why do you see local government as [helpful/an obstacle in] growing your business? [Open Ended]

32. Do you believe state government and elected officials responded appropriately to the economic crisis that began in 2008?

Yes	12.5%
No	72.0%
I don't know/I can't say	15.5%

33. [If "yes" to Q32] Can you provide an example of what the state government did that was appropriate? [If "no" to Q32] Can you provide an example of what the state government did that was not appropriate? [Open Ended]

34. Do you expect the “Affordable Care Act,” commonly called “Obamacare,” to have a positive or a negative impact on your business in the next year (2013), or will it have no impact?

Very positive	7.2%
Somewhat positive	12.3%
Positive	19.6%
Negative	47.2%
Somewhat negative	15.0%
Very negative	32.3%
No real impact	22.7%
I don’t know	10.5%

35. Do you believe that California’s first-in-the-nation environmental regulations, such as AB 32, renewable portfolio standard, green chemistry requirements, and zero emissions vehicle requirements will result in higher job growth or lower job growth?

Much higher	3.9%
Somewhat higher	20.2%
Higher	24.0%
No impact	13.3%
Lower	47.0%
Somewhat lower	17.7%
Much lower	29.3%
I don’t know/I can’t say	15.7%

36. Has your business suffered because of the state’s permitting process – whether through delays or increased project costs?

Yes	32.9%
No	48.6%
Don’t know/I can’t say	18.4%

37. [If “yes” for Q36] Please explain how your business has suffered as a result of the state’s permitting process? [Open Ended]

California business leaders, such as you, have proposed a series of legislative reforms that they believe will improve the state’s economic climate. Please indicate whether you believe reforms within the following broad areas will have a positive impact, a negative impact or no impact at all on California’s overall economic climate.

38. Litigation reform

Strong positive impact	21.5%
Somewhat positive impact	30.7%
Positive impact	52.2%
Negative impact	9.2%
Somewhat negative impact	6.3%
Strong negative impact	2.9%
Little or no impact at all	17.1%
I don’t know	21.4%

39. Labor law reform

Strong positive impact	21.6%
Somewhat positive impact	26.3%
Positive impact	47.9%
Negative impact	13.7%
Somewhat negative impact	7.6%
Strong negative impact	6.1%
Little or no impact at all	17.4%
I don’t know	21.1%

40. Tax reform

Strong positive impact	29.8%
Somewhat positive impact	23.2%
Positive impact	53.0%
Negative impact	18.2%
Somewhat negative impact	10.0%
Strong negative impact	8.2%
Little or no impact at all	11.7%
I don’t know	17.0%

41. Government spending reform

Strong positive impact	31.1%
Somewhat positive impact	21.6%
Positive impact	52.7%
Negative impact	16.5%
Somewhat negative impact	7.7%
Strong negative impact	8.8%
Little or no impact at all	13.8%
I don’t know	17.0%

42. Regulatory reform

Strong positive impact	26.7%
Somewhat positive impact	20.5%
Positive impact	47.2%
Negative impact	14.8%
Somewhat negative impact	8.4%
Strong negative impact	6.4%
Little or no impact at all	15.1%
I don't know	22.9%

43. Permitting reform

Strong positive impact	25.2%
Somewhat positive impact	24.6%
Positive impact	49.8%
Negative impact	12.5%
Somewhat negative impact	7.6%
Strong negative impact	4.9%
Little or no impact at all	15.8%
I don't know	21.9%

44. Energy costs reform

Strong positive impact	21.4%
Somewhat positive impact	27.7%
Positive impact	49.0%
Negative impact	15.0%
Somewhat negative impact	8.6%
Strong negative impact	6.4%
Little or no impact at all	15.3%
I don't know	20.7%

45. Infrastructure investment reform

Strong positive impact	21.0%
Somewhat positive impact	27.8%
Positive impact	48.7%
Negative impact	9.8%
Somewhat negative impact	5.7%
Strong negative impact	4.1%
Little or no impact at all	17.4%
I don't know	24.1%

46. Education reform

Strong positive impact	25.4%
Somewhat positive impact	24.7%
Positive impact	50.1%
Negative impact	11.0%
Somewhat negative impact	5.5%
Strong negative impact	5.5%
Little or no impact at all	21.2%
I don't know	17.7%

California business leaders, such as you, have proposed a series of legislative reforms that they believe will improve the state's economic climate. Please indicate whether you believe the following specific reforms will have a positive impact, a negative impact or no impact at all on California's overall economic climate.

[LITIGATION]

47. Litigation: Class action lawsuit reform, by changing state law to more closely reflect federal law

Strong positive impact	16.0%
Somewhat positive impact	30.1%
Positive impact	46.1%
Negative impact	10.4%
Somewhat negative impact	6.4%
Strong negative impact	4.0%
Little or no impact at all	18.7%
I don't know	24.8%

48. Litigation: Frivolous lawsuit reform, to increase requirements to reduce the number of persons who file meritless and harassing lawsuits

Strong positive impact	39.2%
Somewhat positive impact	32.0%
Positive impact	71.2%
Negative impact	7.1%
Somewhat negative impact	4.3%
Strong negative impact	2.8%
Little or no impact at all	12.6%
I don't know	9.1%

49. Litigation: Bounty hunter reform, by changing the opportunities for filing private attorney actions to enforce state and local laws

Strong positive impact	17.8%
Somewhat positive impact	23.6%
Positive impact	41.4%
Negative impact	8.9%
Somewhat negative impact	4.8%
Strong negative impact	4.1%
Little or no impact at all	16.0%
I don't know	33.7%

50. Litigation: Product liability reform, to cap non-economic damages similar to California's MICRA standards.

Strong positive impact	17.8%
Somewhat positive impact	29.2%
Positive impact	47.0%
Negative impact	8.8%
Somewhat negative impact	4.9%
Strong negative impact	3.9%
Little or no impact at all	14.4%
I don't know	29.8%

51. Litigation: Institute a "loser pays" requirement for civil lawsuits

Strong positive impact	26.8%
Somewhat positive impact	25.3%
Positive impact	52.0%
Negative impact	13.7%
Somewhat negative impact	7.9%
Strong negative impact	5.8%
Little or no impact at all	13.9%
I don't know	20.4%

[LABOR LAWS]

52. Labor Laws: Overtime reform, by changing California's 8-hour per day of work standard to a 40-hour work week

Strong positive impact	24.4%
Somewhat positive impact	34.2%
Positive impact	58.6%
Negative impact	14.5%
Somewhat negative impact	8.3%
Strong negative impact	6.2%
Little or no impact at all	16.0%
I don't know	10.9%

53. Labor Laws: Meal and rest period reform

Strong positive impact	15.2%
Somewhat positive impact	29.5%
Positive impact	44.7%
Negative impact	12.8%
Somewhat negative impact	8.0%
Strong negative impact	4.8%
Little or no impact at all	23.8%
I don't know	18.6%

54. Labor Laws: Conform state labor law to federal labor law

Strong positive impact	14.7%
Somewhat positive impact	27.5%
Positive impact	42.3%
Negative impact	11.6%
Somewhat negative impact	6.6%
Strong negative impact	5.0%
Little or no impact at all	18.2%
I don't know	27.9%

[TAXES]

55. Taxes: Reduce tax rates

Strong positive impact	44.3%
Somewhat positive impact	29.5%
Positive impact	73.8%
Negative impact	11.7%
Somewhat negative impact	7.1%
Strong negative impact	4.6%
Little or no impact at all	7.5%
I don't know	7.0%

56. Taxes: Lower state sales tax rate while broadening the base to include more services, but continue exempting health and food

Strong positive impact	26.8%
Somewhat positive impact	33.5%
Positive impact	60.3%
Negative impact	18.0%
Somewhat negative impact	10.3%
Strong negative impact	7.8%
Little or no impact at all	10.9%
I don't know	10.8%

57. Taxes: Conform California tax law to federal law for simplification

Strong positive impact	18.6%
Somewhat positive impact	34.2%
Positive impact	52.8%
Negative impact	9.7%
Somewhat negative impact	5.4%
Strong negative impact	4.3%
Little or no impact at all	13.6%
I don't know	23.9%

58. Taxes: Eliminate manufacturing equipment sales tax

Strong positive impact	26.9%
Somewhat positive impact	30.4%
Positive impact	57.3%
Negative impact	11.1%
Somewhat negative impact	6.6%
Strong negative impact	4.5%
Little or no impact at all	11.1%
I don't know	20.5%

59. Taxes: Expand and make permanent Research and Development tax credit

Strong positive impact	24.0%
Somewhat positive impact	36.1%
Positive impact	60.1%
Negative impact	6.3%
Somewhat negative impact	4.3%
Strong negative impact	2.1%
Little or no impact at all	13.4%
I don't know	20.1%

60. Taxes: Expand available jobs tax credits such as through expansion of Enterprise Zones

Strong positive impact	18.5%
Somewhat positive impact	36.1%
Positive impact	54.6%
Negative impact	6.5%
Somewhat negative impact	3.9%
Strong negative impact	2.6%
Little or no impact at all	16.1%
I don't know	22.9%

[GOVERNMENT SPENDING]

61. Government Spending: Institute a spending cap

Strong positive impact	41.2%
Somewhat positive impact	25.5%
Positive impact	66.7%
Negative impact	12.9%
Somewhat negative impact	6.9%
Strong negative impact	6.0%
Little or no impact at all	8.2%
I don't know	12.3%

62. Government Spending: Institute a state rainy day fund requirement to eliminate boom and bust budgeting

Strong positive impact	34.6%
Somewhat positive impact	34.2%
Positive impact	68.8%
Negative impact	6.9%
Somewhat negative impact	4.3%
Strong negative impact	2.6%
Little or no impact at all	11.1%
I don't know	13.2%

63. Government Spending: Institute a pay-as-you-go requirement under which any new spending approved through legislation or initiative must also identify compensating cuts or a new funding source

Strong positive impact	38.3%
Somewhat positive impact	31.0%
Positive impact	69.4%
Negative impact	10.2%
Somewhat negative impact	6.1%
Strong negative impact	4.1%
Little or no impact at all	8.2%
I don't know	12.3%

64. Government Spending: Pension reform, by shifting government employee pensions to a hybrid plan including 401K-style plans

Strong positive impact	40.0%
Somewhat positive impact	28.0%
Positive impact	68.0%
Negative impact	10.1%
Somewhat negative impact	4.3%
Strong negative impact	5.7%
Little or no impact at all	8.0%
I don't know	14.0%

[REGULATIONS]

65. Regulation: Modernize CEQA, California's environmental impact review process

Strong positive impact	25.0%
Somewhat positive impact	27.1%
Positive impact	52.1%
Negative impact	7.0%
Somewhat negative impact	4.3%
Strong negative impact	2.7%
Little or no impact at all	13.5%
I don't know	27.4%

66. Regulation: Simplify or repeal California's pending Green Chemistry regulations

Strong positive impact	25.0%
Somewhat positive impact	18.5%
Positive impact	43.5%
Negative impact	15.5%
Somewhat negative impact	7.1%
Strong negative impact	8.4%
Little or no impact at all	12.0%
I don't know	29.0%

67. Regulation: Require the Legislature to enact regulatory reforms that would reduce total regulatory compliance costs now paid by California businesses and consumers by a specific amount, such as \$10 to \$20 billion

Strong positive impact	26.4%
Somewhat positive impact	28.3%
Positive impact	54.8%
Negative impact	9.6%
Somewhat negative impact	5.1%
Strong negative impact	4.5%
Little or no impact at all	10.2%
I don't know	25.5%

68. Regulation: Require the Legislature to complete a sunset review of all existing California regulations that go beyond the federal requirements, repeal those where the compliance costs do not justify the benefits, and institute reforms to reduce the compliance burden for those that are retained

Strong positive impact	36.8%
Somewhat positive impact	28.9%
Positive impact	65.6%
Negative impact	8.5%
Somewhat negative impact	4.5%
Strong negative impact	4.0%
Little or no impact at all	7.2%
I don't know	18.7%

69. Regulation: For all new regulations, require the Legislature to reduce the compliance costs of any existing regulations so that the net impact is zero

Strong positive impact	34.6%
Somewhat positive impact	26.9%
Positive impact	61.5%
Negative impact	9.8%
Somewhat negative impact	4.9%
Strong negative impact	4.9%
Little or no impact at all	9.3%
I don't know	19.5%

[ENERGY COSTS]

70. Energy Costs: Reduce compliance costs for AB 32 climate change regulations

Strong positive impact	27.9%
Somewhat positive impact	26.7%
Positive impact	54.6%
Negative impact	12.8%
Somewhat negative impact	6.2%
Strong negative impact	6.5%
Little or no impact at all	10.5%
I don't know	22.2%

71. Energy Costs: Include an economic requirement in California's renewable energy standards such that the average cost of electricity in California is no more than 20% higher than the national average by 2020 and 10% higher by 2030

Strong positive impact	31.5%
Somewhat positive impact	31.9%
Positive impact	63.4%
Negative impact	11.4%
Somewhat negative impact	6.7%
Strong negative impact	4.7%
Little or no impact at all	9.3%
I don't know	15.9%

[INFRASTRUCTURE INVESTMENT]

72. Infrastructure Investment: Implement prevailing wage reform to reduce the cost of publicly-funded infrastructure projects

Strong positive impact	28.4%
Somewhat positive impact	31.0%
Positive impact	59.4%
Negative impact	11.6%
Somewhat negative impact	5.6%
Strong negative impact	6.1%
Little or no impact at all	9.5%
I don't know	19.5%

73. Infrastructure Investment: Streamline the decision process for infrastructure improvements and additions, including exemptions from California's CEQA environmental review

Strong positive impact	26.9%
Somewhat positive impact	27.9%
Positive impact	54.8%
Negative impact	13.1%
Somewhat negative impact	7.0%
Strong negative impact	6.1%
Little or no impact at all	8.9%
I don't know	23.2%

74. Infrastructure Investment: Institute a dedicated funding source for infrastructure, even if this means instituting a new tax for this purpose

Strong positive impact	11.7%
Somewhat positive impact	21.7%
Positive impact	33.3%
Negative impact	32.3%
Somewhat negative impact	16.7%
Strong negative impact	15.6%
Little or no impact at all	12.3%
I don't know	22.1%

75. Infrastructure Investment: Expand provisions for public-private partnerships for the construction and operation of new infrastructure facilities

Strong positive impact	20.6%
Somewhat positive impact	36.0%
Positive impact	56.7%
Negative impact	8.8%
Somewhat negative impact	5.1%
Strong negative impact	3.7%
Little or no impact at all	11.7%
I don't know	22.8%

76. Infrastructure Investment: Revise the current proposed Water Bond to require more of the funds be spent on capital improvements that will increase the reliability and safety of the state's water supply, including new water storage

Strong positive impact	24.8%
Somewhat positive impact	34.8%
Positive impact	59.6%
Negative impact	6.9%
Somewhat negative impact	3.3%
Strong negative impact	3.6%
Little or no impact at all	12.0%
I don't know	21.5%

77. Infrastructure Investment: Complete the proposed High Speed Rail project to connect Northern and Southern California urban centers

Strong positive impact	18.2%
Somewhat positive impact	19.7%
Positive impact	37.9%
Negative impact	38.9%
Somewhat negative impact	6.6%
Strong negative impact	32.2%
Little or no impact at all	10.6%
I don't know	12.6%

[EDUCATION]

78. Education: Evaluation of teacher effectiveness should be linked to student achievement outcomes

Strong positive impact	32.8%
Somewhat positive impact	30.8%
Positive impact	63.7%
Negative impact	15.4%
Somewhat negative impact	7.6%
Strong negative impact	7.9%
Little or no impact at all	13.3%
I don't know	7.6%

79. Education: Institute transparency and disclosure requirements for schools to provide school site expenditures and budget information on their websites

Strong positive impact	32.7%
Somewhat positive impact	36.4%
Positive impact	69.1%
Negative impact	5.2%
Somewhat negative impact	3.3%
Strong negative impact	1.8%
Little or no impact at all	16.9%
I don't know	8.9%

80. Education: Institute a new STEM (science, technology, engineering, and math) academy program in all middle schools and high schools

Strong positive impact	42.3%
Somewhat positive impact	33.7%
Positive impact	76.1%
Negative impact	4.1%
Somewhat negative impact	2.0%
Strong negative impact	2.0%
Little or no impact at all	10.7%
I don't know	9.1%

81. Education: Bypass the Legislature and state budget process, and send education funds directly to K-12 schools and community colleges on a per-pupil basis

Strong positive impact	36.0%
Somewhat positive impact	29.8%
Positive impact	65.7%
Negative impact	8.6%
Somewhat negative impact	4.7%
Strong negative impact	4.0%
Little or no impact at all	7.9%
I don't know	17.8%

82. Of the following, which would have the most positive impact on your business?

Class action reform	11.0%
AB 32 reform	12.7%
Overtime law reform	19.7%
CEQA regulation reform	8.8%
Something else	47.8%

82a. [If Q82 is "Something else"] You previously mentioned "Something else"...what would have the most positive impact on your business? [Open Ended]

82b. [If Q82 is "Class action reform/AB 32 reform/Overtime law reform/ CEQA regulation reform"] Why do you think [insert answer from Q82] will have the greatest positive impact on California' economy? [Open Ended]

83. From your perspective, what other reforms can California adopt at the state and local level to improve our economic climate? [Open Ended]

84. Please indicate the California region or regions where your company hosts a physical presence [Check all that apply]

Los Angeles	31.0%
Inland Empire	11.3%
San Diego	11.3%
Central Valley	14.1%
Central Coast	7.1%
Bay Area	24.1%
North California	13.1%
Orange County	12.0%

85. Are you a minority-owned business?

Yes	34.9%
No	65.1%

86. Does your primary business also fall under the Green Goods & Services industry subsector?

Yes	9.7%
No	90.3%