



# California's Middle Market Perspectives on Government Services

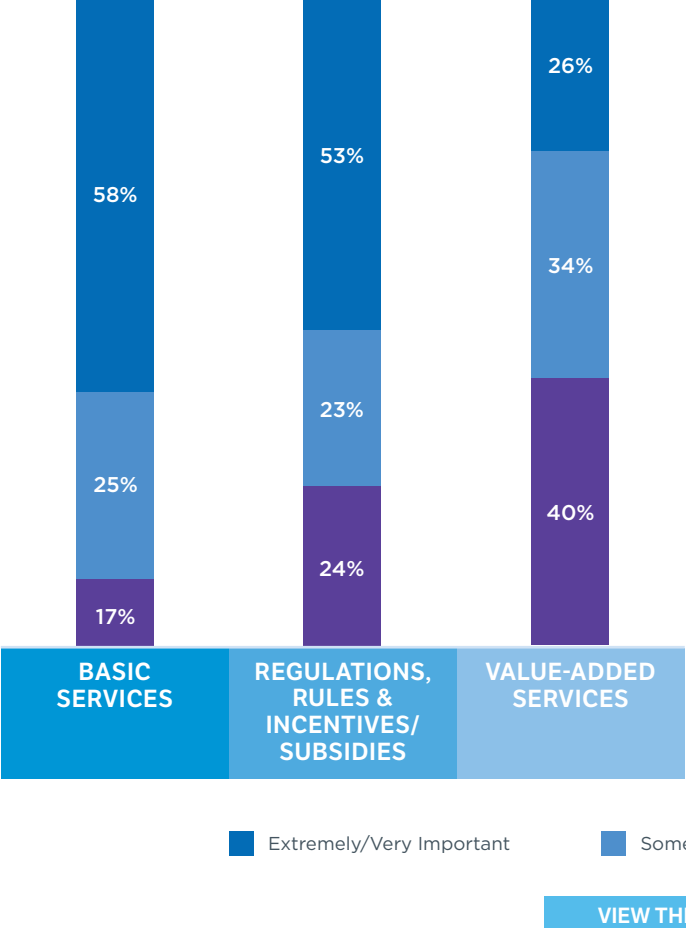
## CALIFORNIA'S MIDDLE MARKET COMPARED TO THE U.S. MIDDLE MARKET

The U.S. middle market is the fastest growing segment of the economy. But it is often stuck in the middle: too big to qualify for special services or to be exempt from regulations, and too large to field government-affairs teams at seats of government. The National Center for the Middle Market

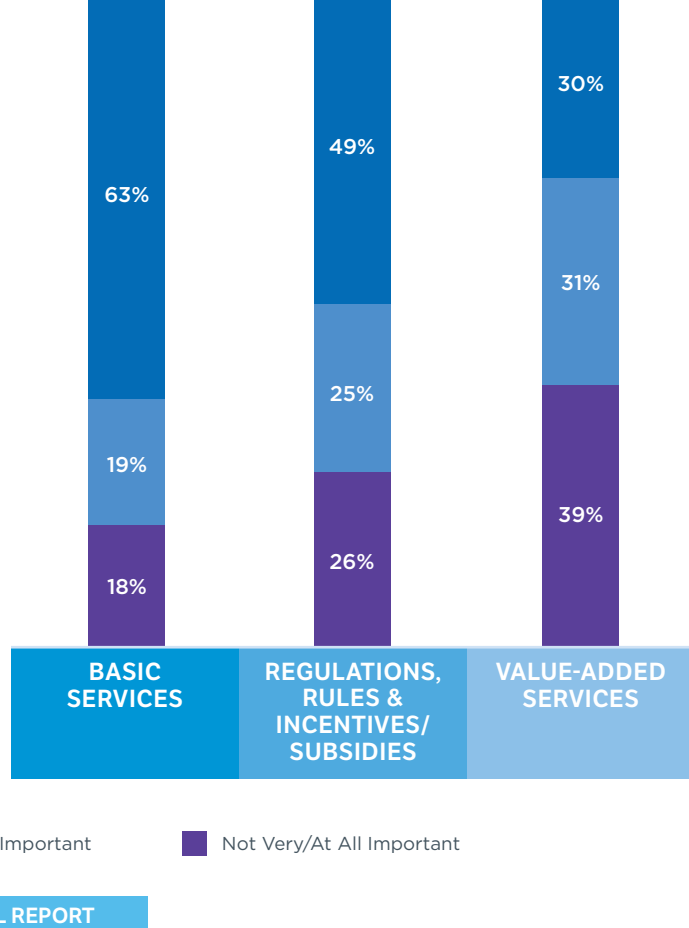
therefore took an election-year opportunity to ask middle market executives to evaluate the quality and impact of the government services they receive. This data shows how California's middle market view of government services compares to the view of the U.S. middle market as a whole.

### IMPORTANCE OF GOVERNMENT FUNCTIONS TO BUSINESS OPERATIONS

#### CALIFORNIA'S MIDDLE MARKET



#### NATIONAL MIDDLE MARKET

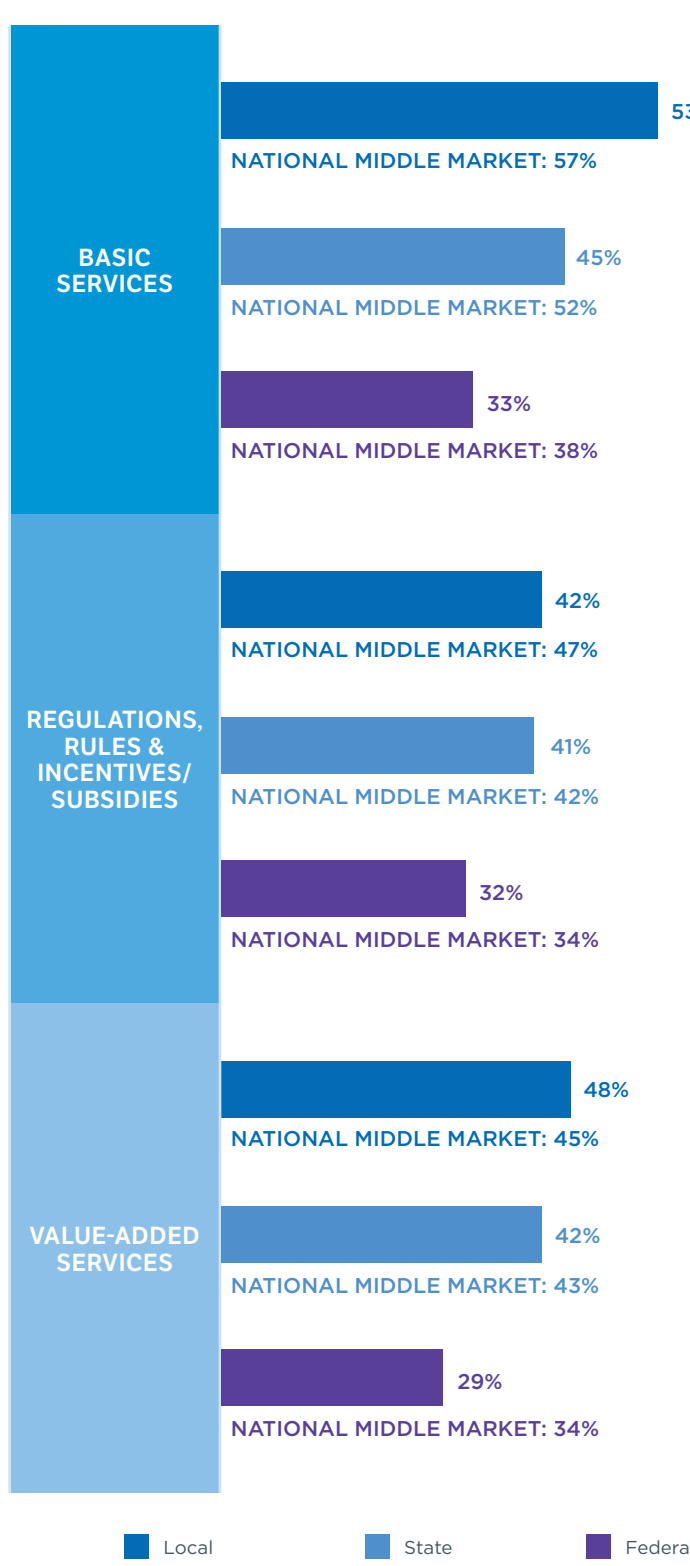


Extremely/Very Important Somewhat Important Not Very/At All Important

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### PERCENT AT LEAST SOMEWHAT SATISFIED WITH GOVERNMENT SERVICES

#### CALIFORNIA'S MIDDLE MARKET

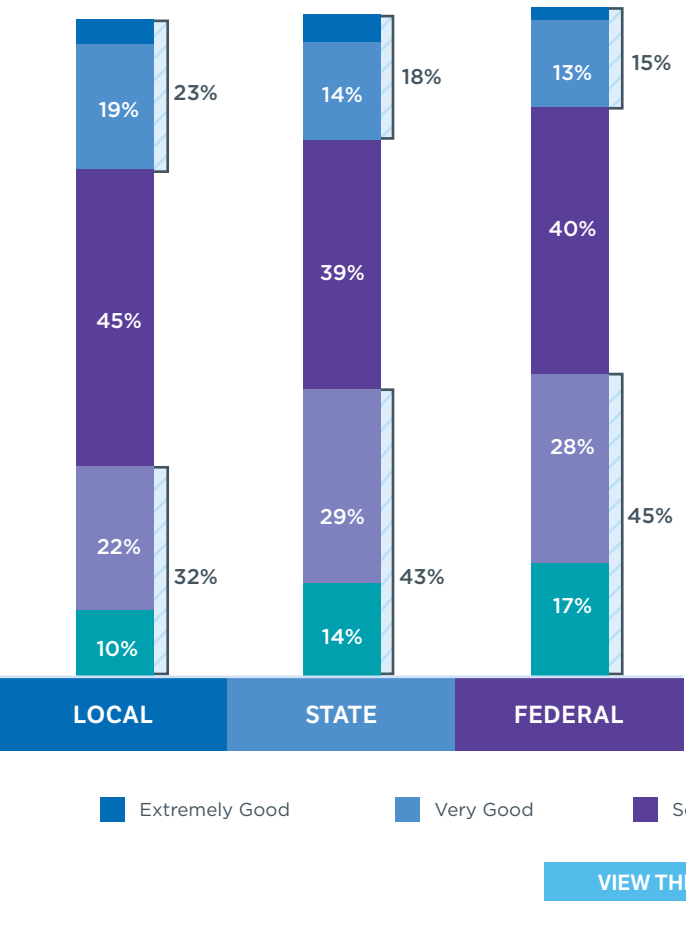


Local State Federal

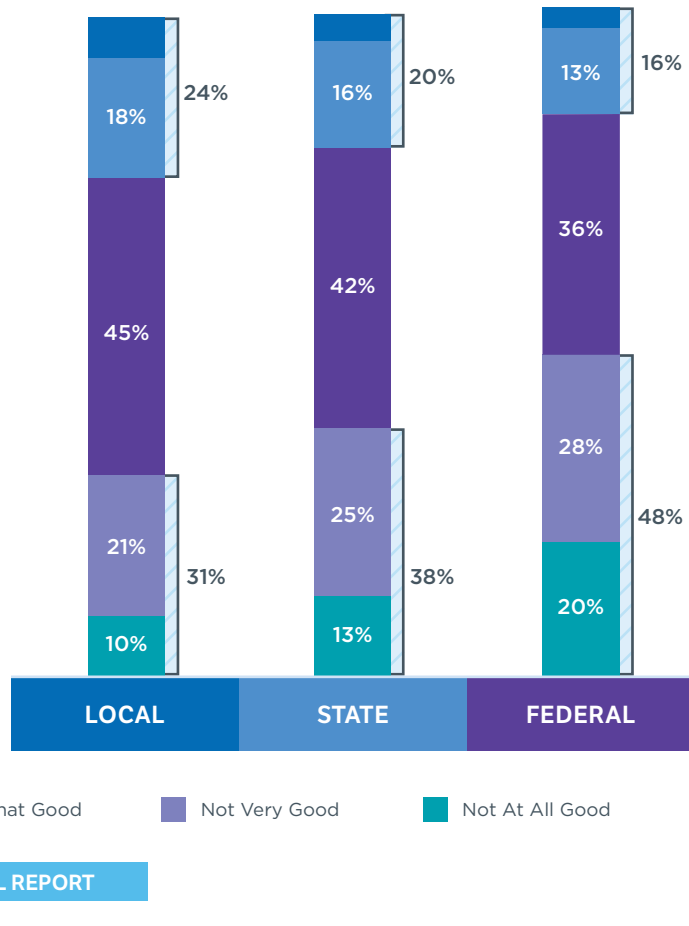
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### VALUE FOR THE MONEY FOR THE TAXES/FEE'S PAID TO EACH LEVEL OF GOVERNMENT

#### CALIFORNIA'S MIDDLE MARKET



#### NATIONAL MIDDLE MARKET

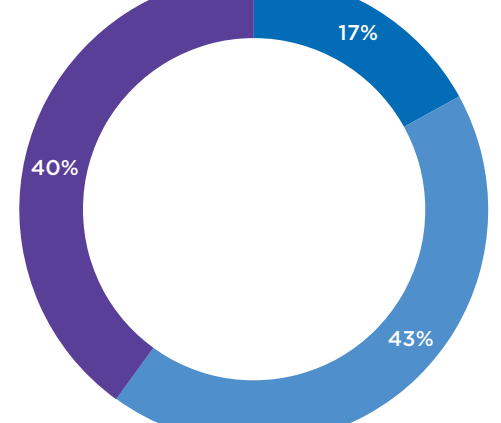


Extremely Good Very Good Somewhat Good Not Very Good Not At All Good

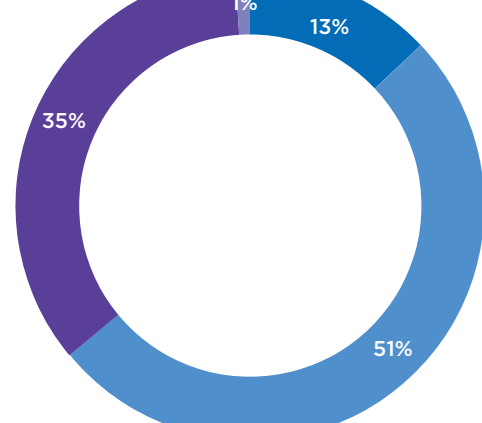
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### COMPANY'S REGULATORY BURDEN

#### CALIFORNIA'S MIDDLE MARKET



#### NATIONAL MIDDLE MARKET

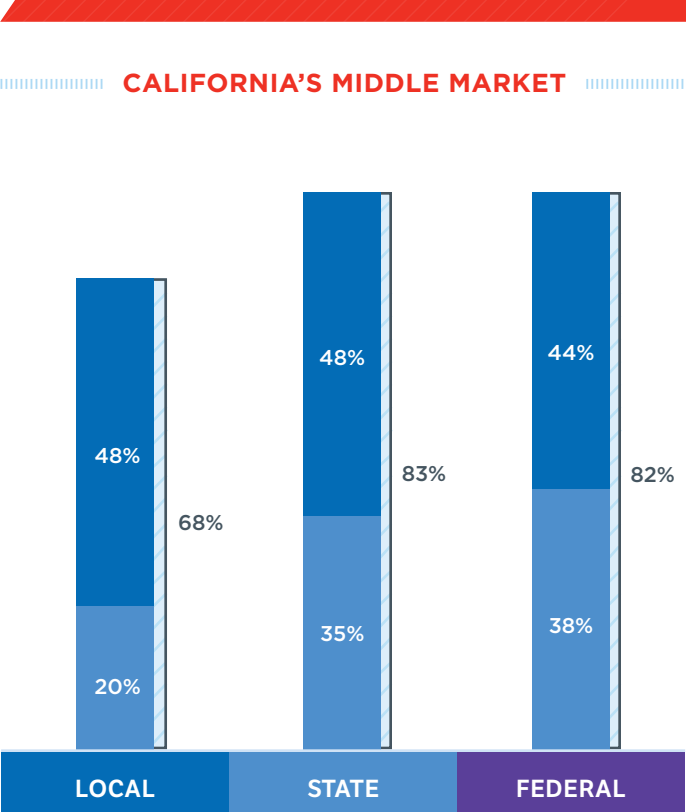


Unmanageably High High, But Manageable About Right Less Than Optimal

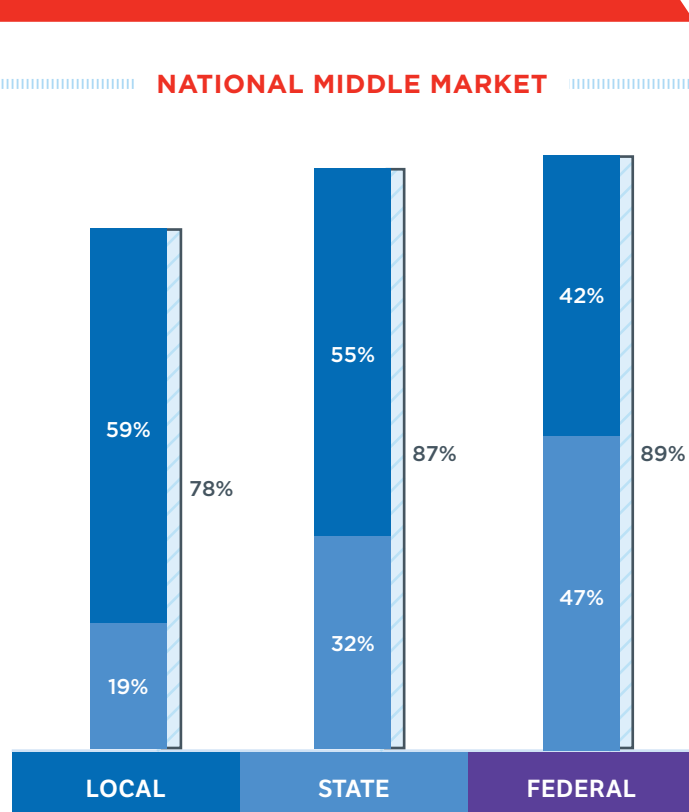
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### IMPACT OF REGULATIONS ON BUSINESSES BY LEVEL OF GOVERNMENT

#### CALIFORNIA'S MIDDLE MARKET



#### NATIONAL MIDDLE MARKET

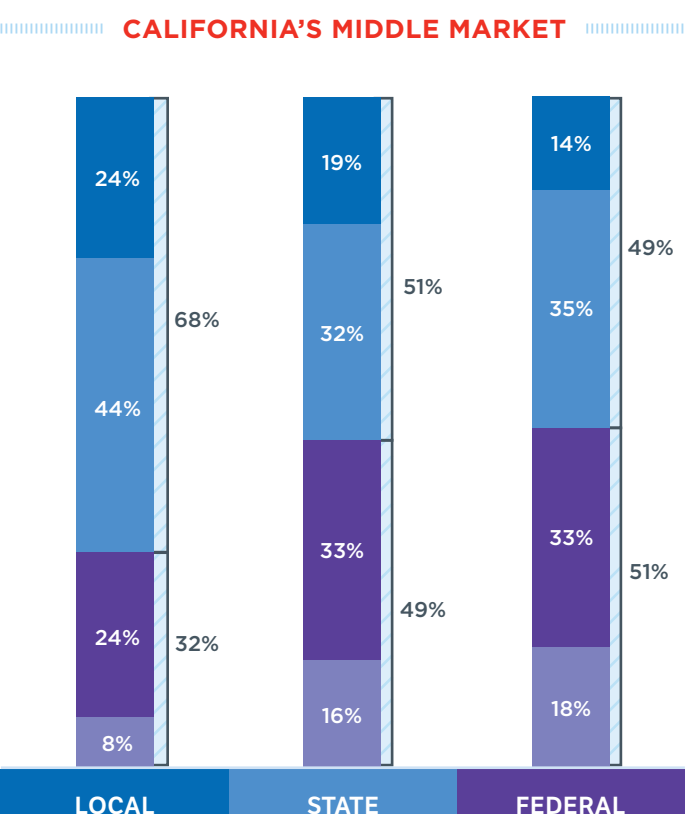


Minor Major

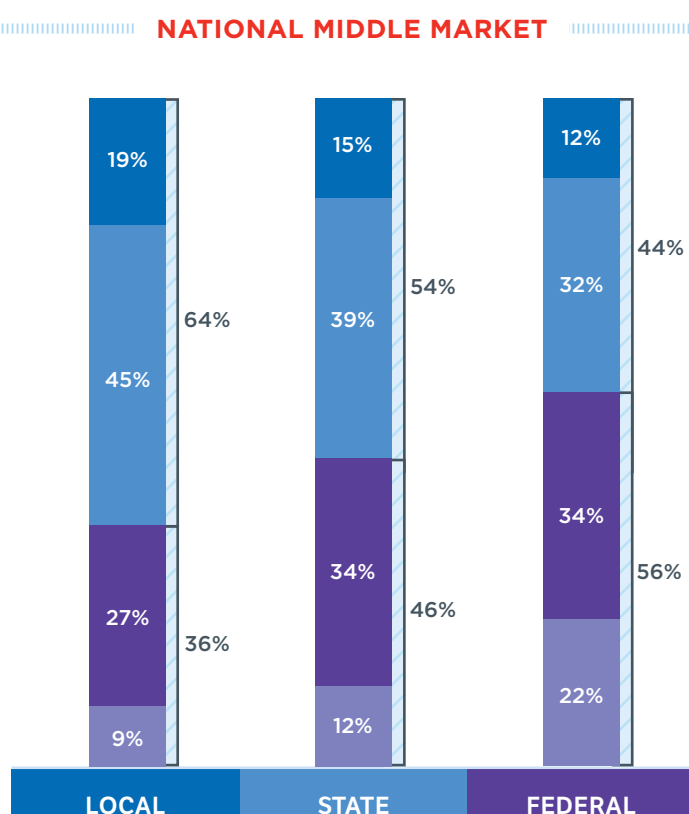
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### QUALITY OF EXPERIENCE WITH A GOVERNMENT OFFICIAL

#### CALIFORNIA'S MIDDLE MARKET



#### NATIONAL MIDDLE MARKET

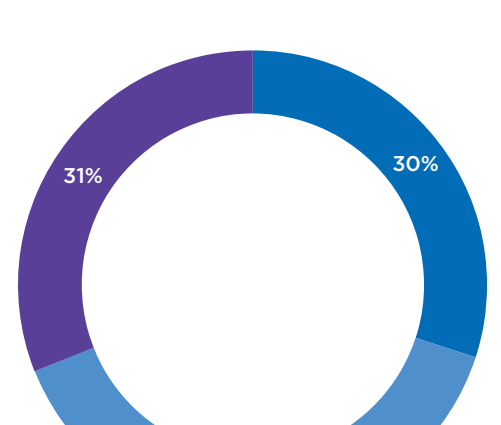


Quite Good, Actually They Do Their Best They Are So-So They Barely Try

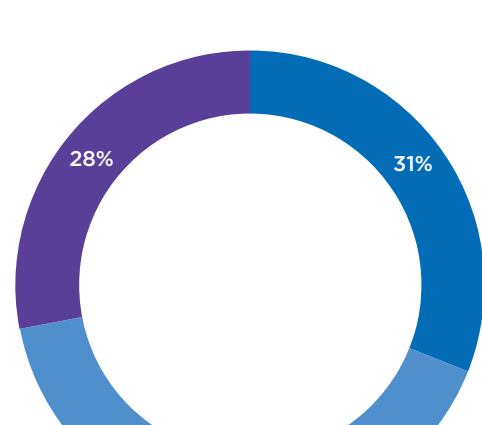
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### EXTENT TO WHICH REGULATIONS FROM DIFFERENT LEVELS OF GOVERNMENT COMPOUND EACH OTHER

#### CALIFORNIA'S MIDDLE MARKET



#### NATIONAL MIDDLE MARKET

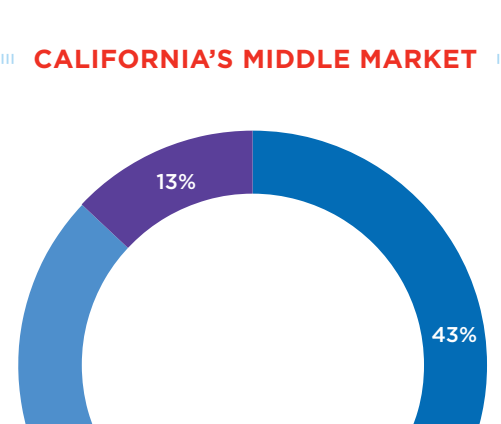


Major Compounding Effect Some Compounding Effect No Compounding Effect

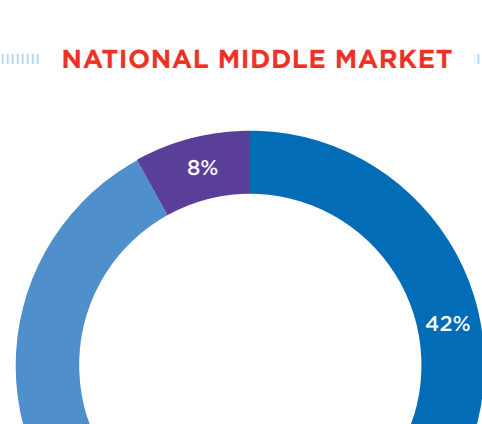
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### PREFERENCE BETWEEN LOWERING TAXES OR MAKING TAXES LESS COMPLEX

#### CALIFORNIA'S MIDDLE MARKET



#### NATIONAL MIDDLE MARKET



Lower Taxes Make Taxes Less Complex Neither

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