



MOORE INFORMATION

OPINION RESEARCH • STRATEGIC ANALYSIS

Nevada Likely Voters Survey

Retail Association of Nevada

September 2013 with Historic Data

Methodology

Sample

500 live interviews among a representative sample of likely voters in Nevada.

Method

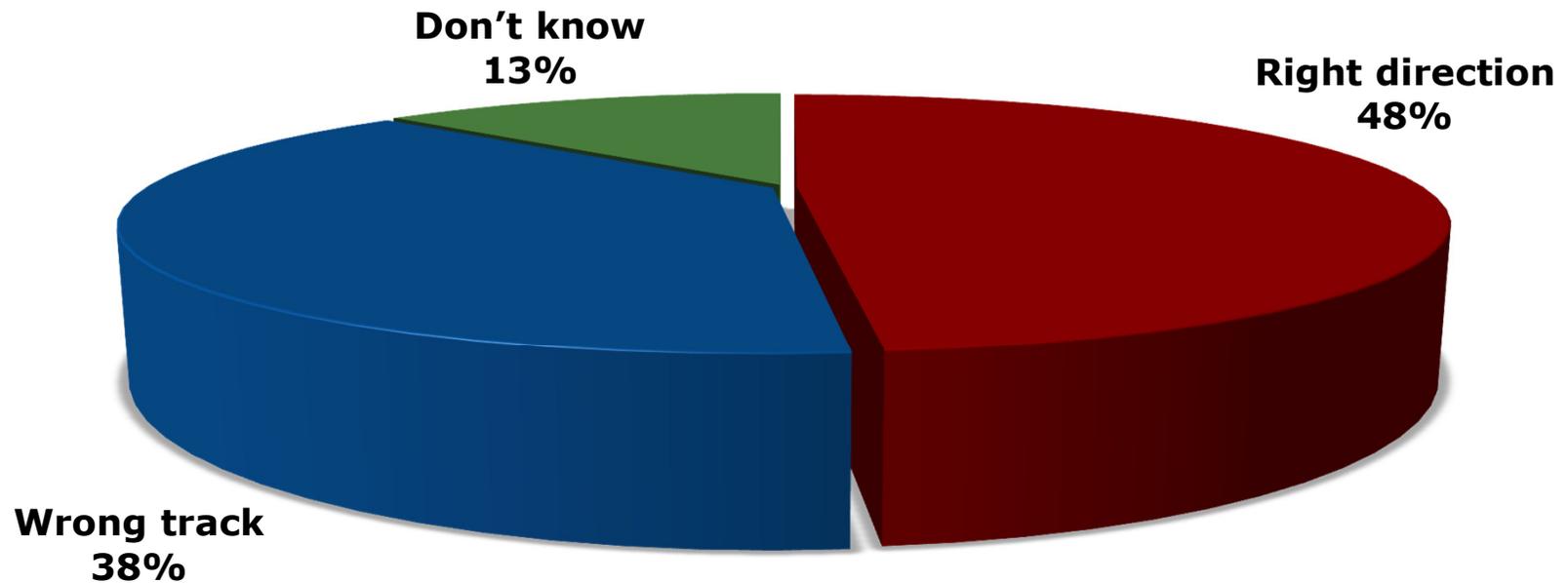
Landline and cell phone interviews conducted September 27-29, 2013.

Sampling Error

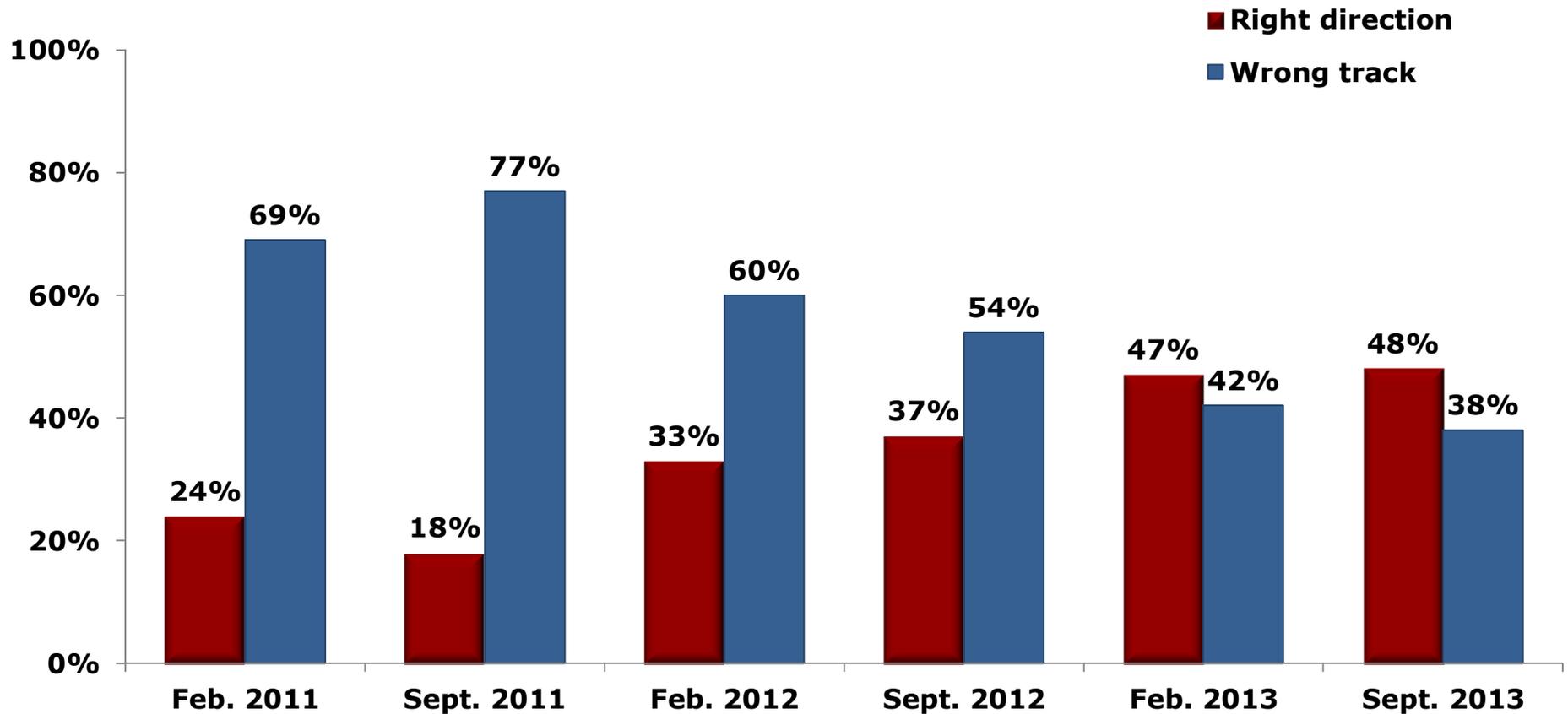
Plus or minus 4% at the 95% confidence level.

Voter Mood is Cautiously Optimistic

"Would you say things in Nevada are generally headed in the right direction or have they pretty seriously gotten off on the wrong track?" (Q3)

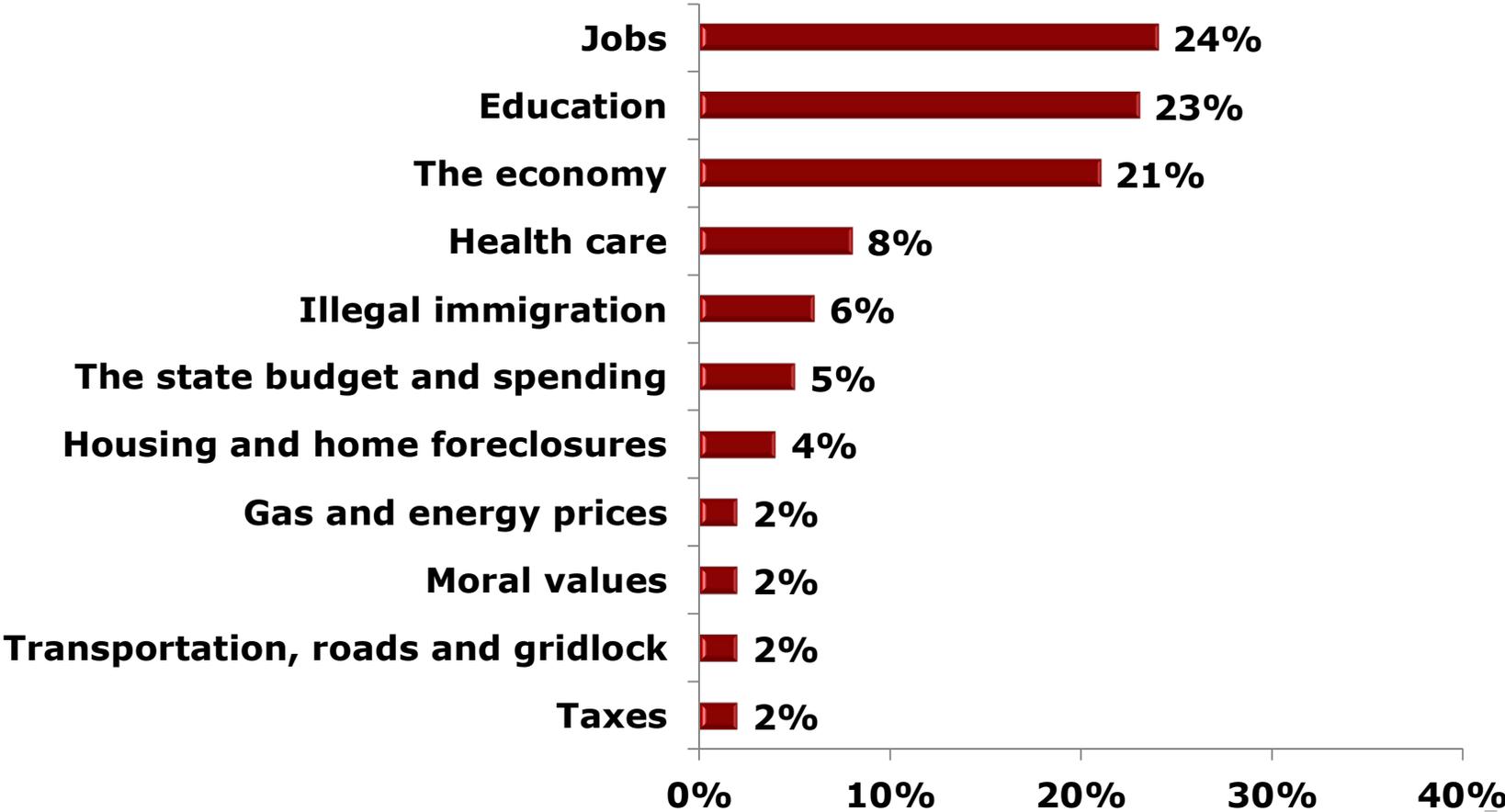


Voter Mood: *Historic Trends*



Issue Priorities

“Which one of the following issues do you think should be top priority of Nevada’s Governor and State Legislature?” (Q5)

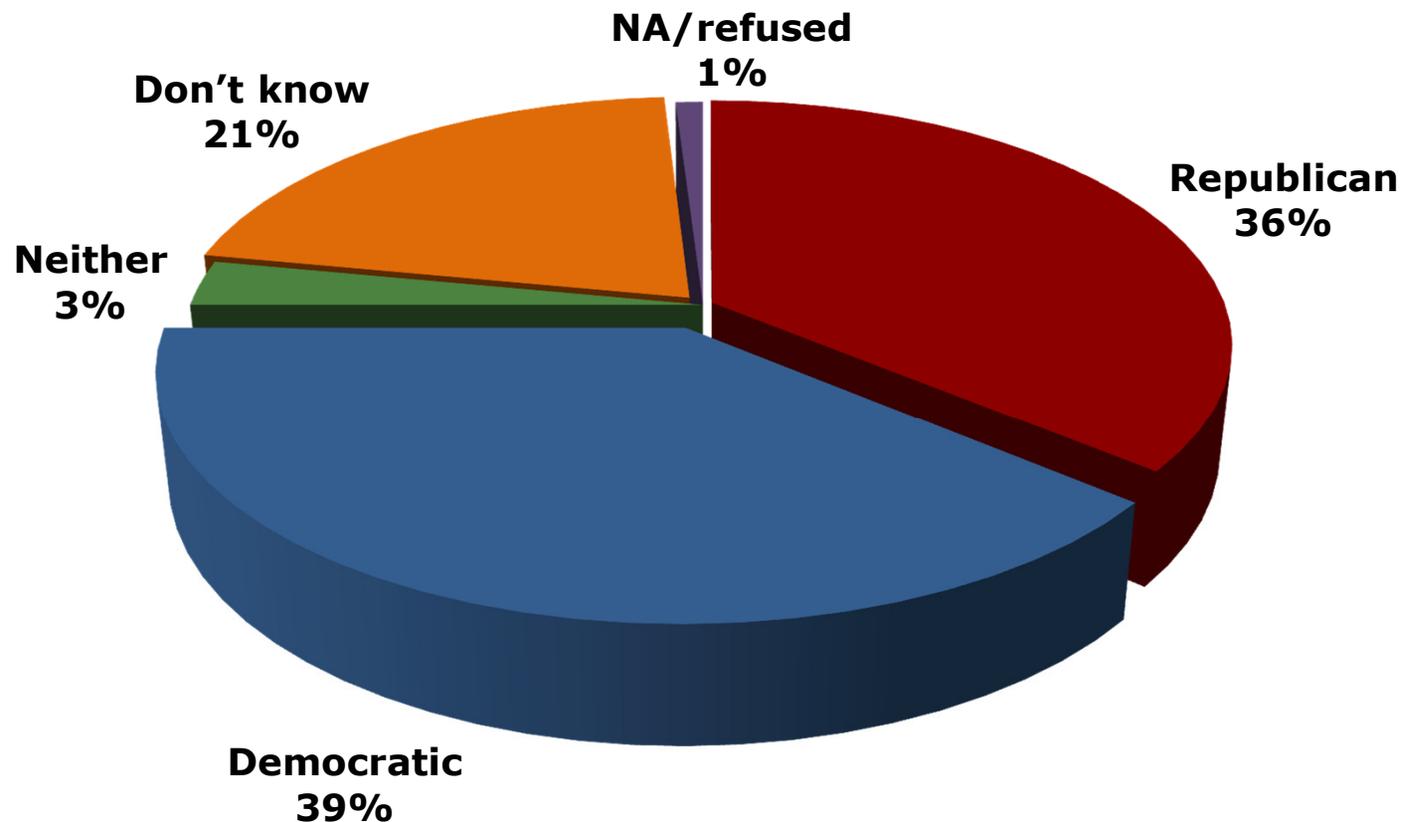


Issue Priorities: *Historic Trends*

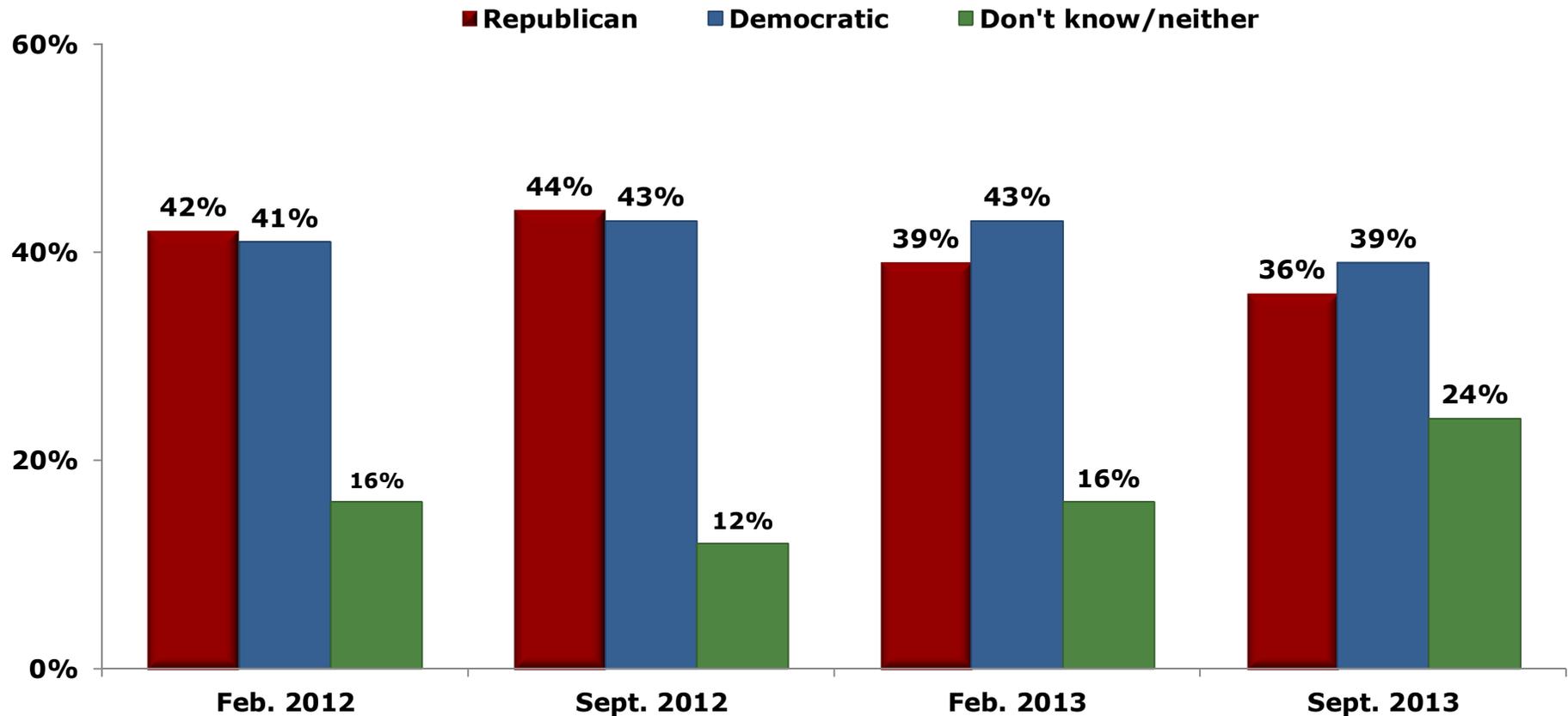
	Feb. 2011	Sept. 2011	Feb. 2012	Sept. 2012	Feb. 2013	Sept. 2013
Jobs	NA	36%	27%	26%	22%	24%
Education	22%	17%	20%	20%	26%	23%
Economy	43%	19%	23%	27%	17%	21%
Health care	2%	2%	2%	5%	5%	8%
Illegal immigration	6%	6%	5%	4%	5%	6%
State budget/spending	16%	8%	6%	5%	12%	5%
Housing/foreclosures	5%	6%	9%	6%	5%	4%
Gas/energy prices	1%	*	3%	1%	2%	2%
Moral values	1%	1%	1%	1%	2%	2%
Transportation/roads	*	1%	*	1%	1%	2%
Taxes	1%	1%	3%	2%	4%	2%

Generic Ballot for State Legislature

"Thinking about the elections in November 2014, if the election for state legislature was held today, would you vote for (ROTATE) the Republican candidate or the Democratic candidate?" (Q4)

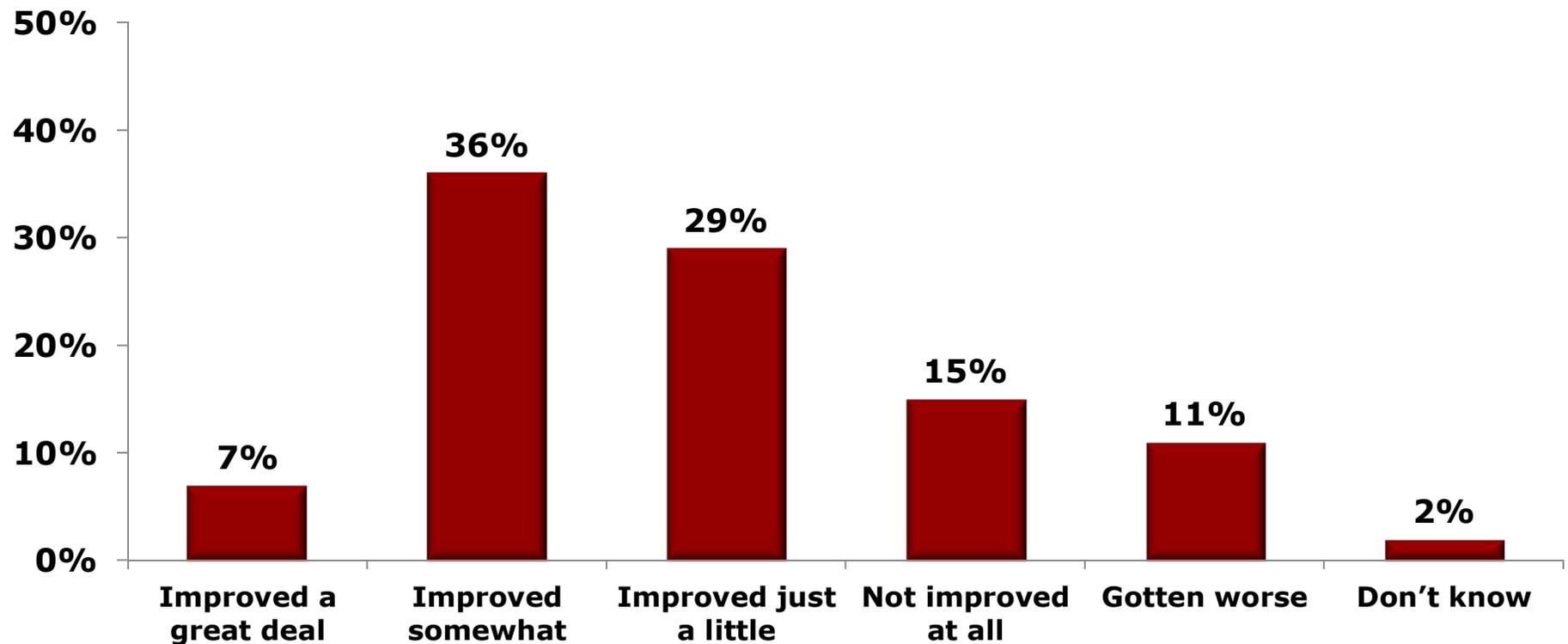


Generic Ballot for State Legislature: *Historic Trends*



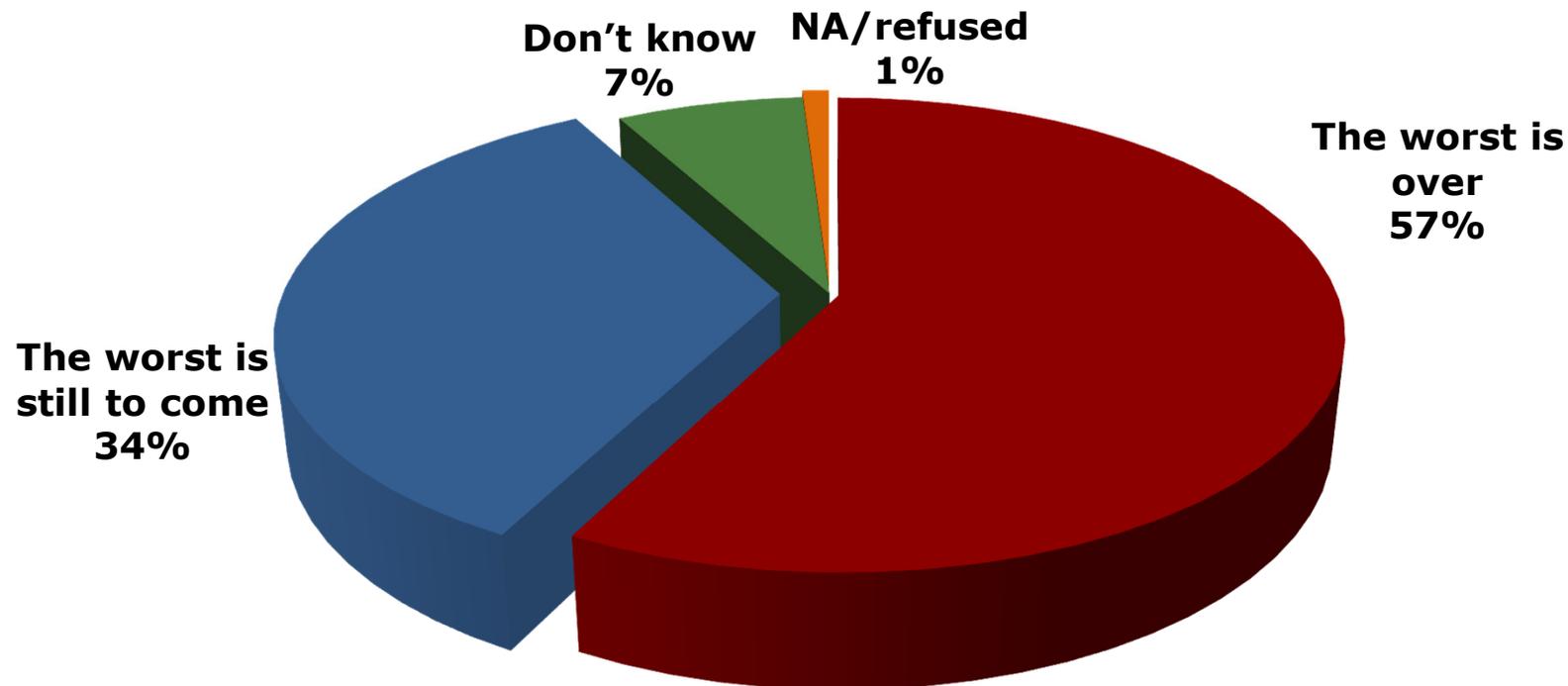
Perceptions of the Current Economy

"It's been five years since the beginning of the financial crisis and the economic downturn that followed. Compared to the worst part of that crisis, from your perspective has the economy..." (Q6)

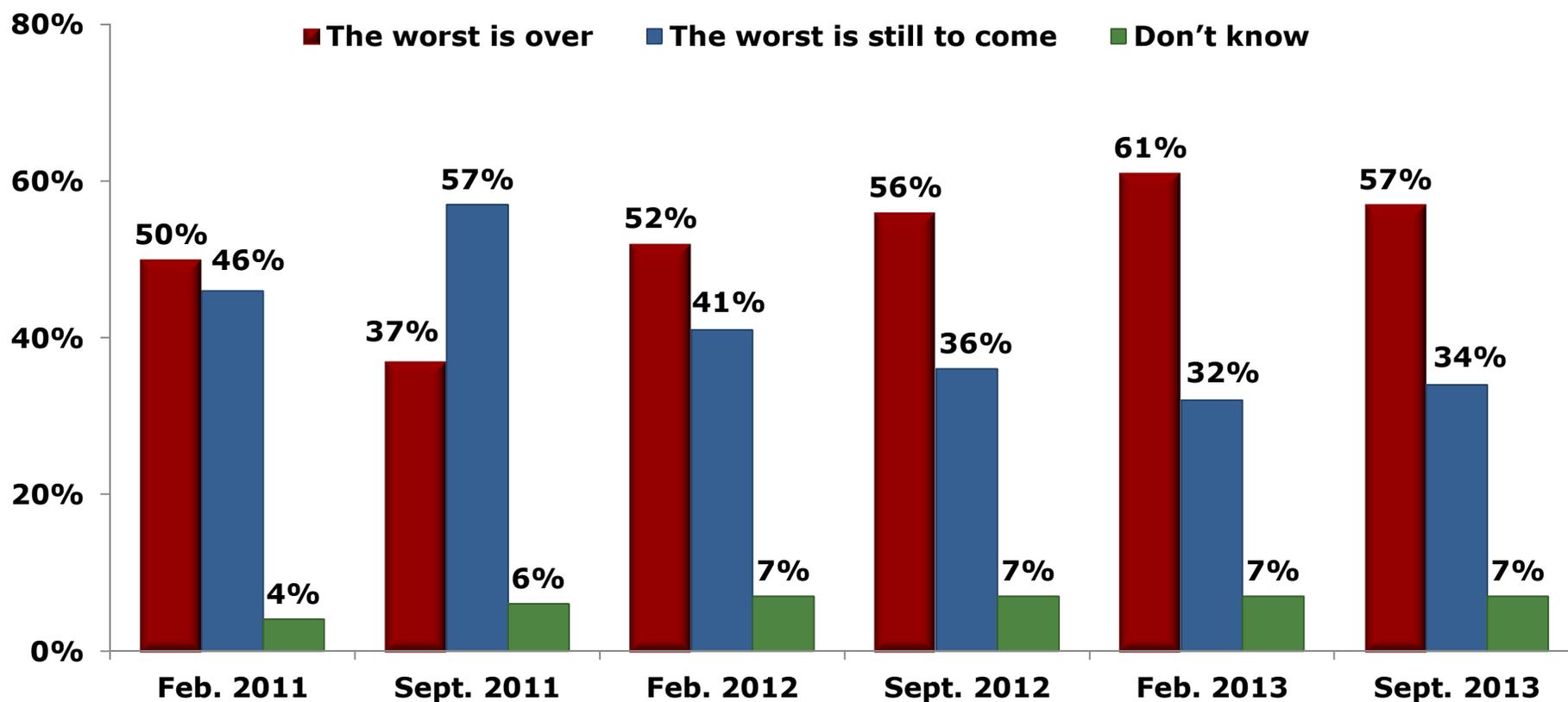


Majority Says the “Worst is Over”

“Nevada has recently been going through a difficult time. Do you feel that...” (Q7)

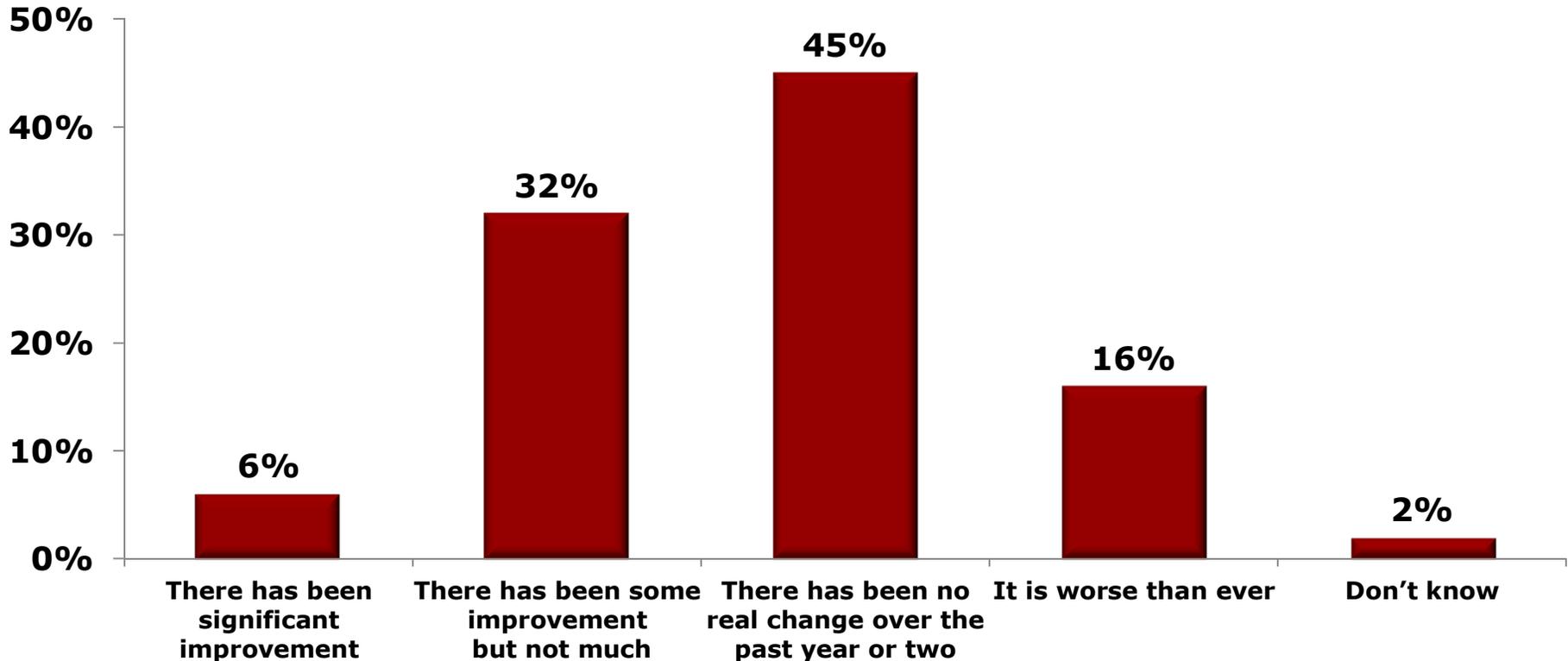


"Worst is Over" *Historic Trends*



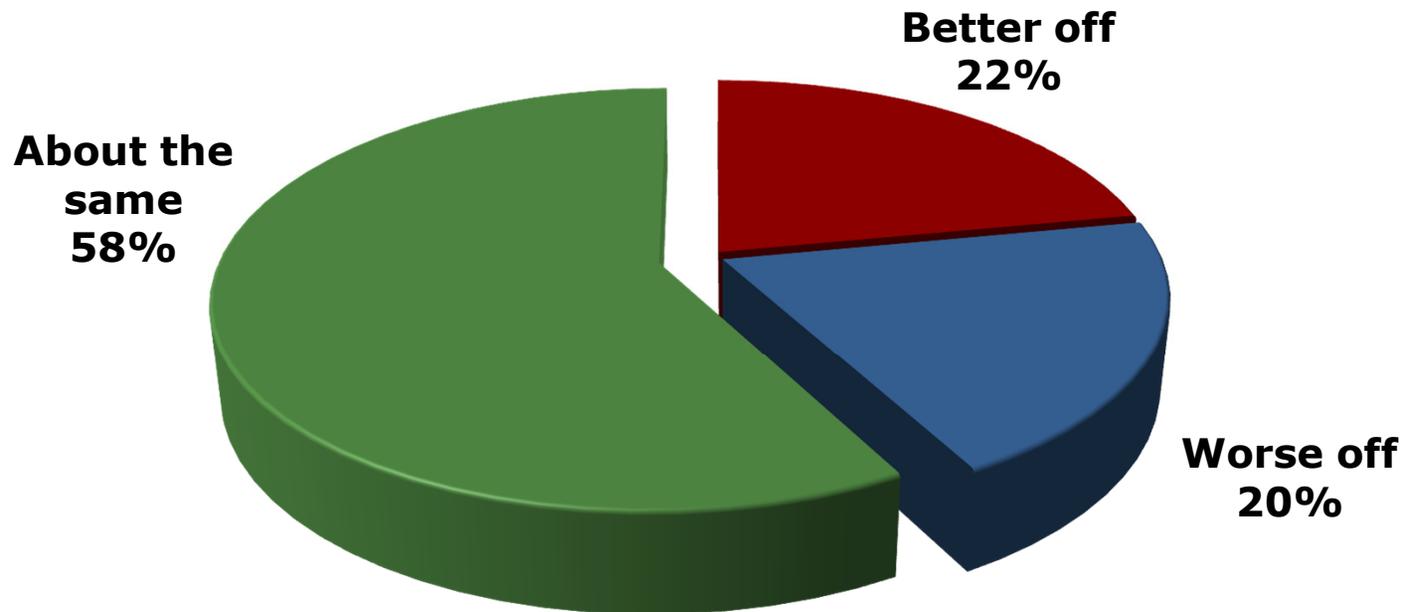
Impact of Economic Recovery on Individual Households

“Much has been written about the current economic recovery, yet a new economic census indicates that recovery is not reaching all segments of the population. To what extent, if any, has the economy’s recovery impacted your household’s financial situation? Would you say...” (Q8)



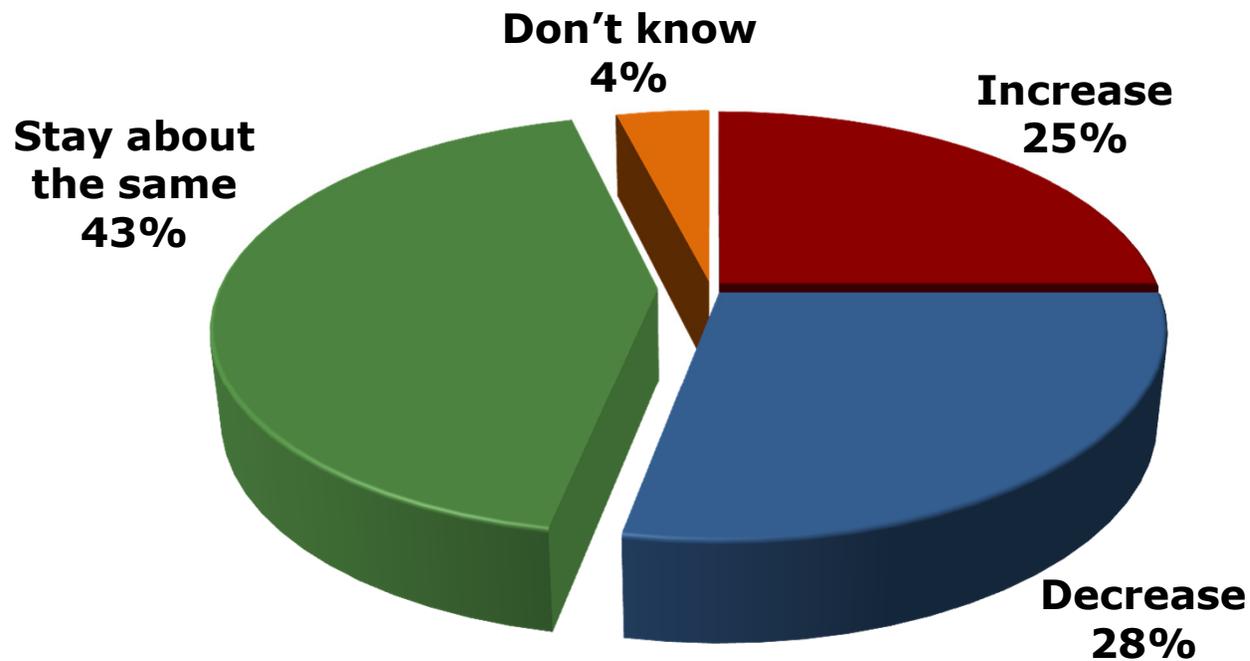
Personal Financial Situation: *Majority Say No Change*

"And thinking now just about you, compared to one year ago, would you say you are..." (Q9)

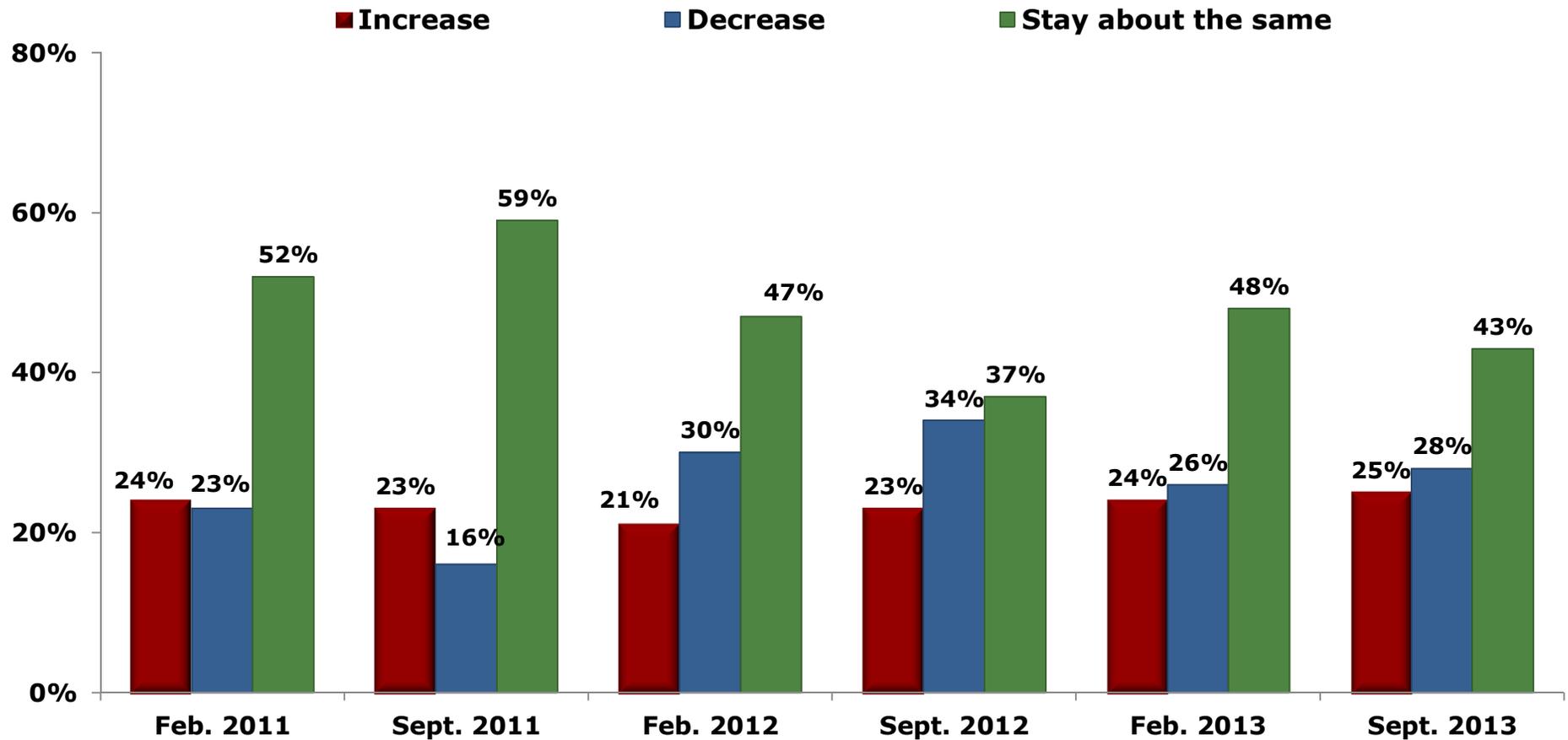


Expectations for Nevada's Unemployment Rate

"Nevada's unemployment rate is one of the highest in the nation. Over the next year, do you think Nevada's unemployment will..." (Q10)

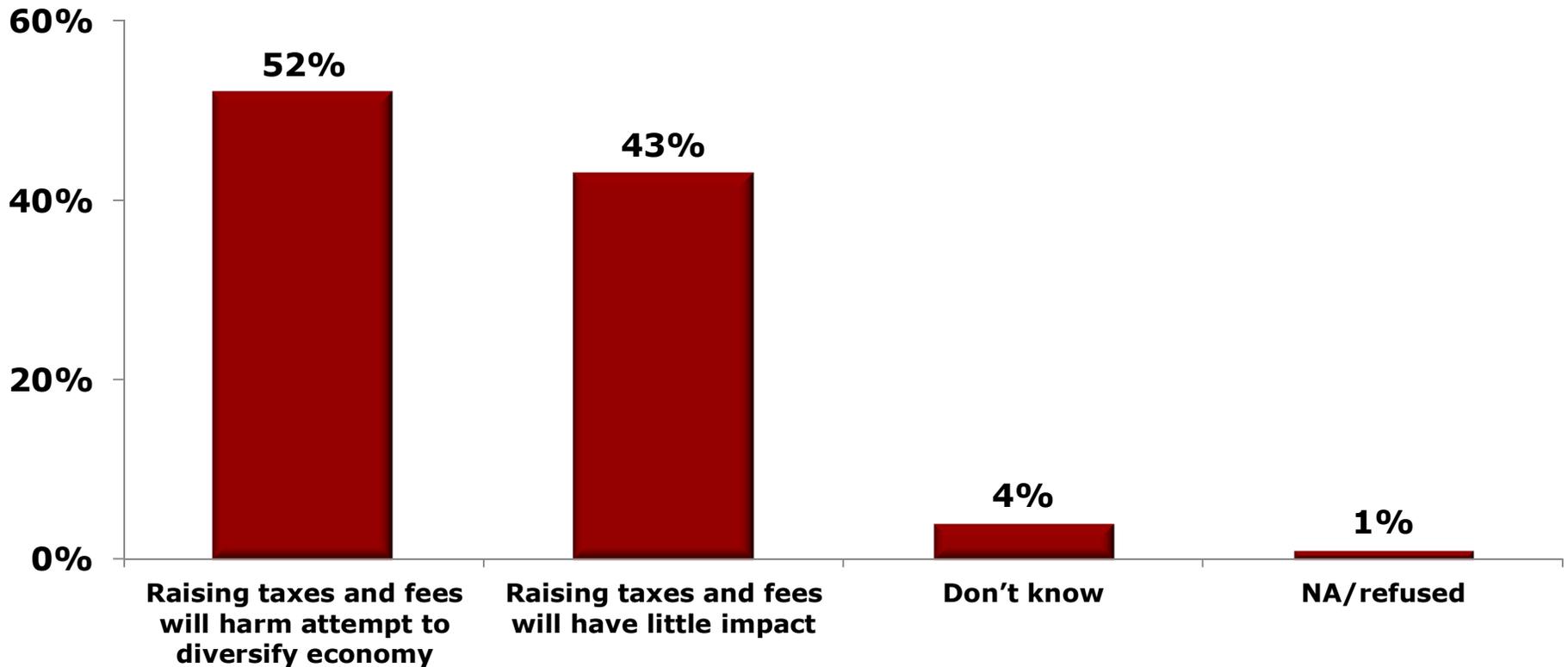


Expectations for Nevada's Unemployment Rate: *Historic Trends*

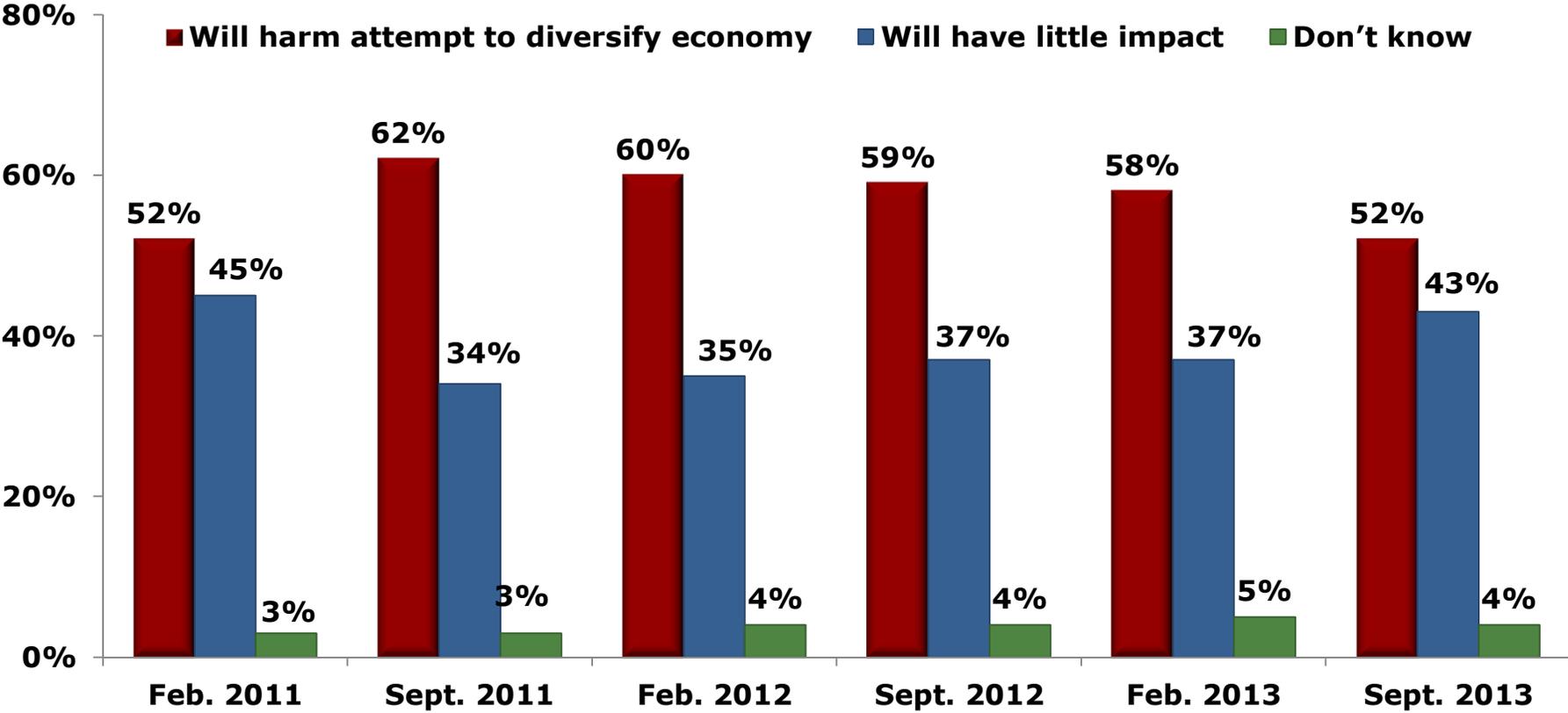


Majority Say Raising Taxes Will Harm Economy

“Do you think that raising taxes or fees on businesses will harm Nevada's attempt to diversify the economy and attract new businesses to the state, or do you think that raising taxes or fees will have little impact on the state's ability to attract new businesses?” (Q11)



Raising Taxes: *Historic Trends*



* Surveys prior to September 2013 included "industries" rather than "businesses"

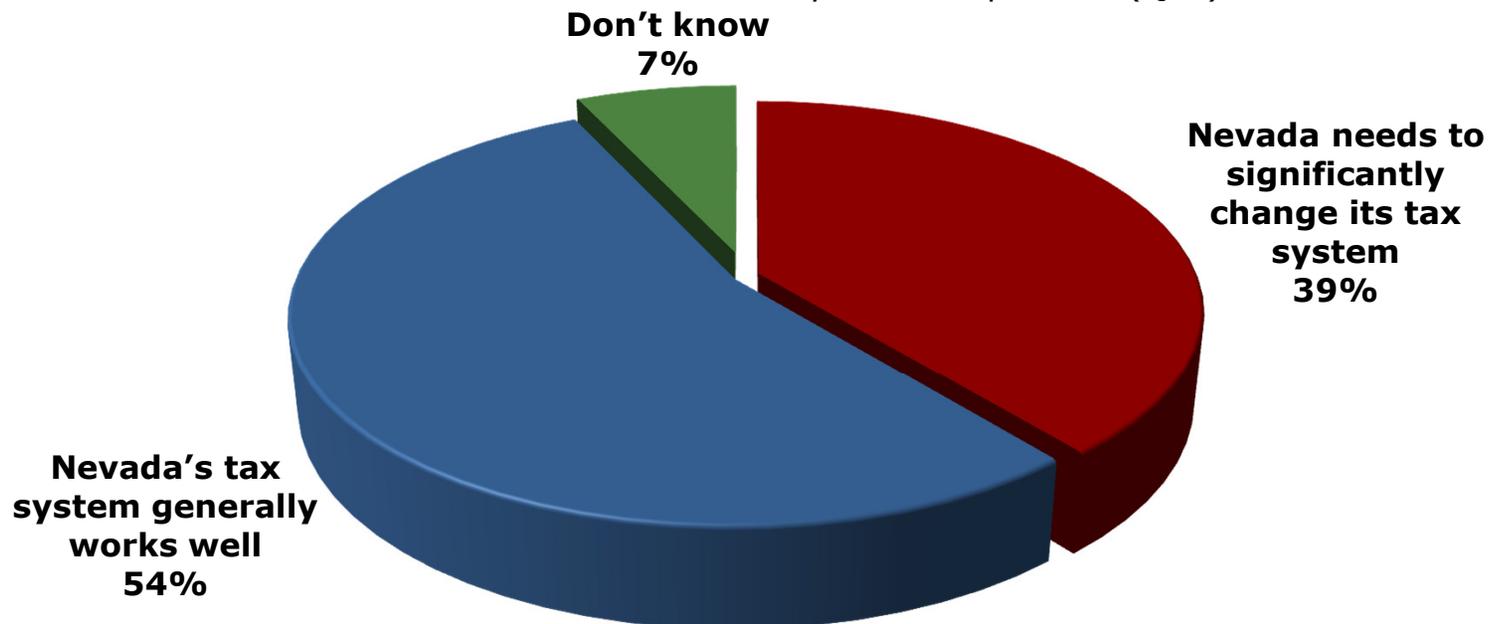
Majority Say Nevada's Tax System Generally Works Well

"Thinking more about Nevada's tax system

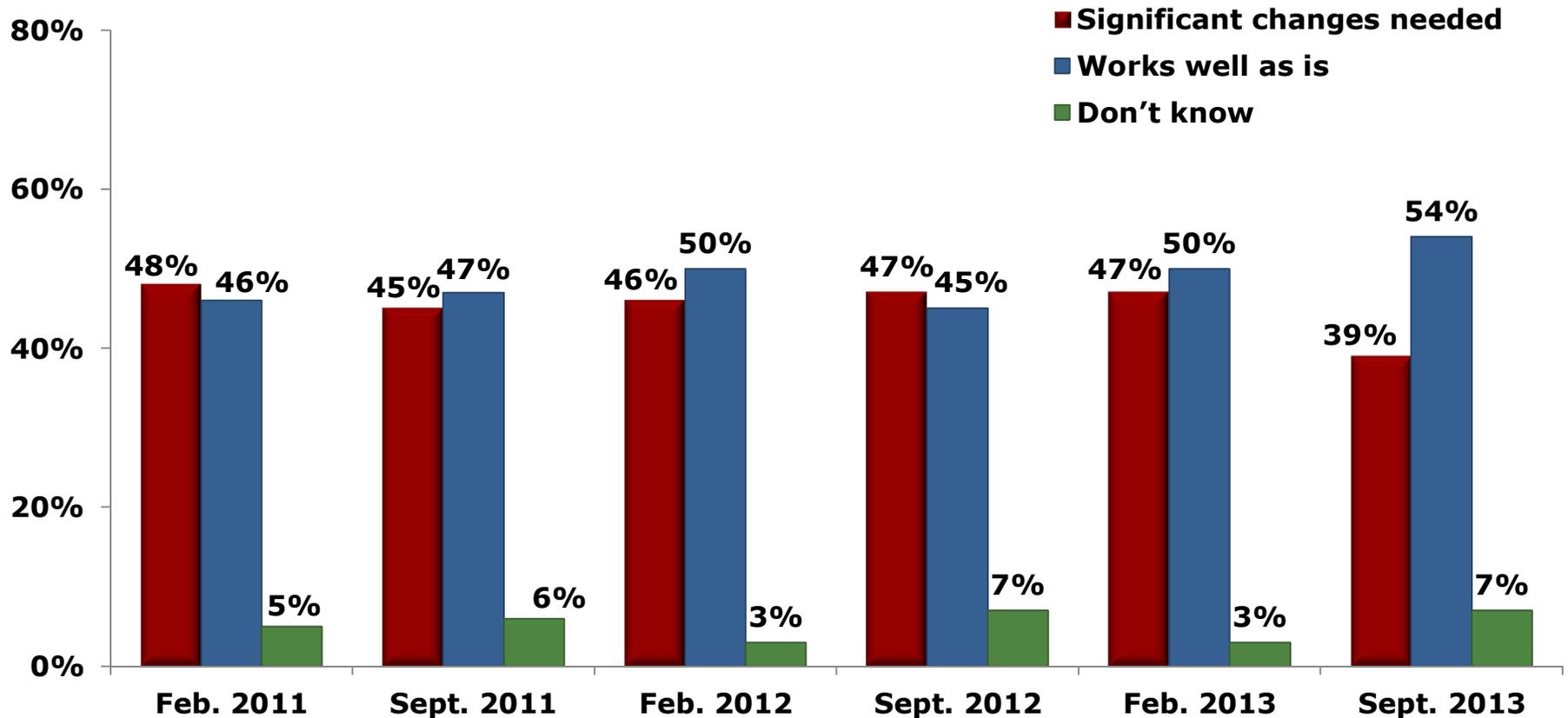
Some (other) people say that Nevada needs to significantly change its tax system to become less dependent on gaming and sales taxes, and more stable, by requiring more businesses to pay additional taxes. They say every time there is a downturn in the national economy, the casinos are hurt and consumers spend less money, which ends up hurting the state budget.

Other (some) people say that Nevada's tax system generally works well. They say times are unusually hard across the country, as most other states have major budget problems too. Making all businesses pay more in taxes will only end up increasing the state's unemployment rate and budget shortfall.

Which statement comes closest to your own opinion?" (Q12)

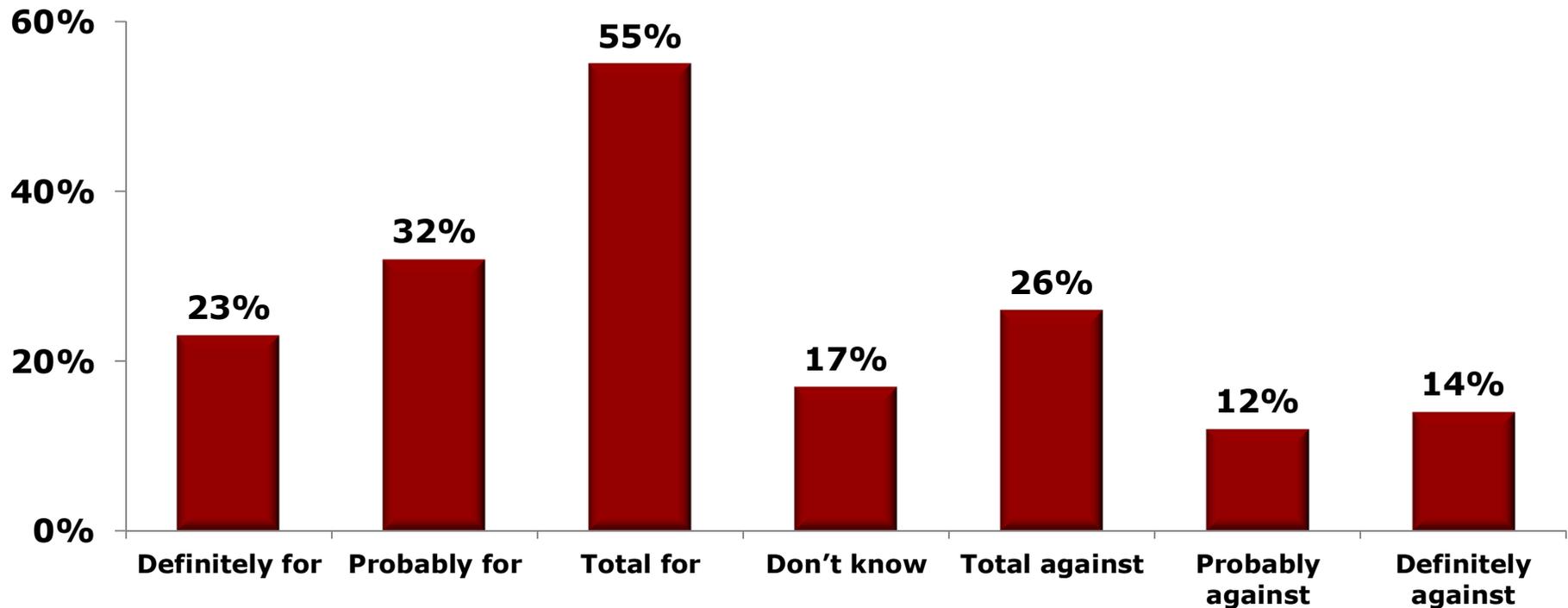


Nevada's Tax System: *Historic Trends*



Majority Support for Nevada Appeals Court Measure

“Thinking now about some proposals that will be on the ballot in November 2014, as you may know, the Nevada Legislature has placed a question on the ballot in 2014 concerning whether Nevada should add an appeals court to its court system. If passed, appeals of district court decisions would be made to the new appeals court instead of the Supreme Court. Would you vote for or against the creation of an appeals court in Nevada?” (Q13)



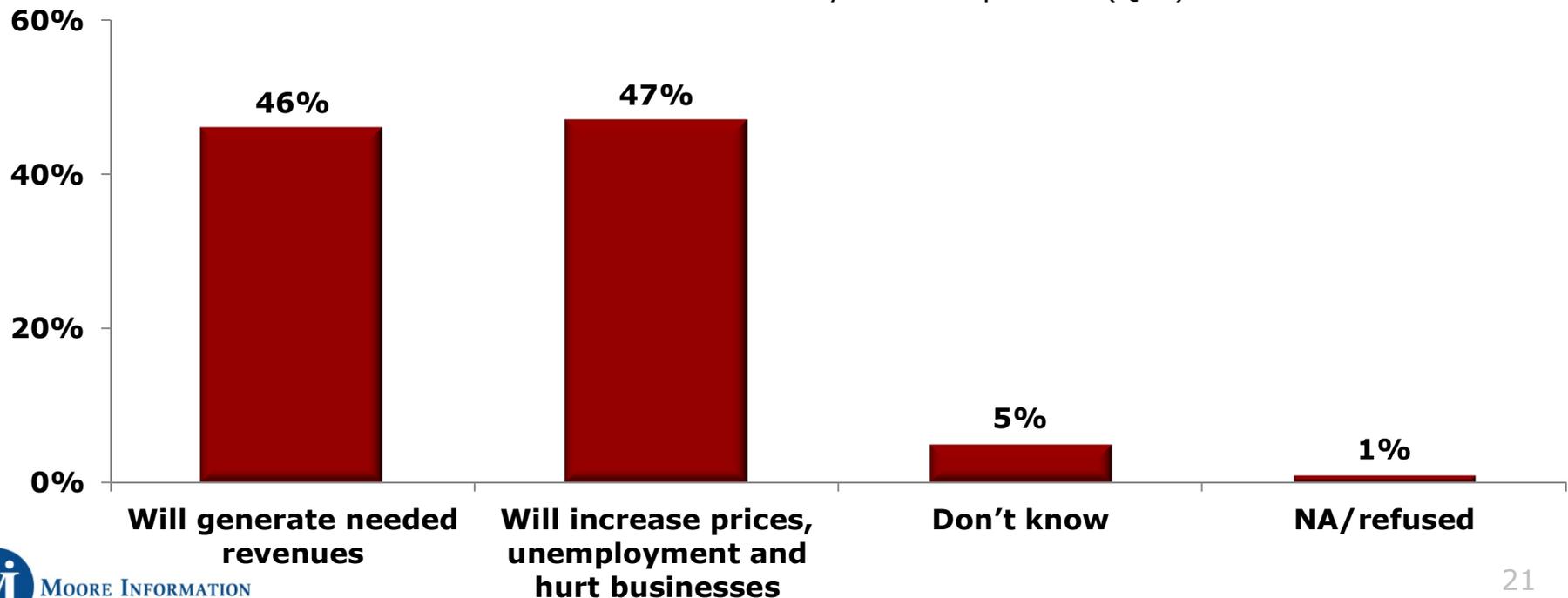
Voters are Divided over Whether Education Initiative Will Be Good for Schools or Bad for Economy

"The Education Initiative would create an additional two percent tax on gross revenues on all non-gaming businesses whose gross revenues exceed \$1 million. Please tell me which of the following statements about this proposal comes closest to your own opinion about the Initiative.

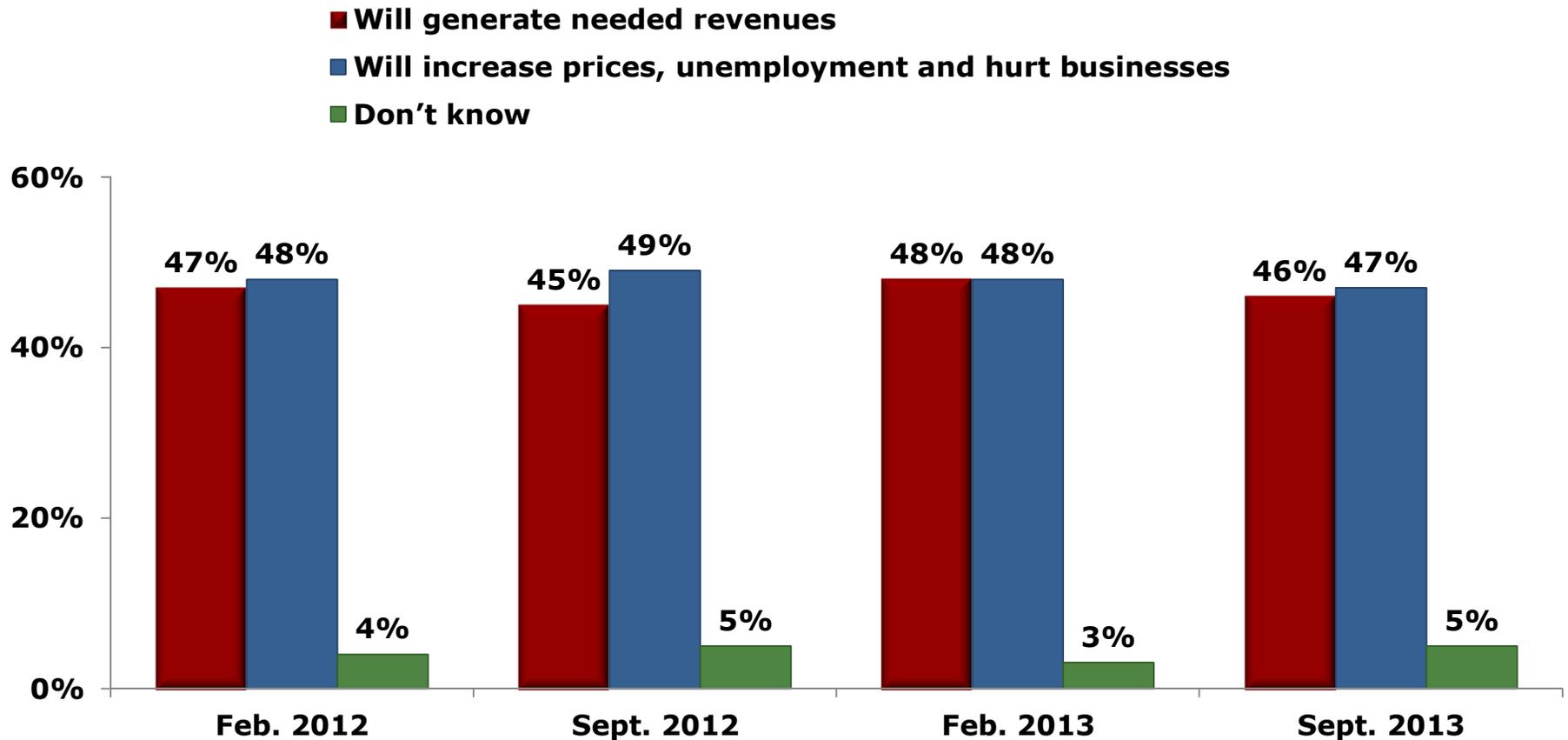
Some (other) people say the additional tax on non-gaming revenues will generate needed revenues to support education and this form of business tax is necessary to improve our schools.

Other (some) people say that this additional tax on non-gaming revenues will increase unemployment and cause some already struggling businesses to fail since it applies even to businesses that are not profitable, and it will also harm efforts to attract new businesses to Nevada.

Which statement comes closest to your own opinion?" (Q14)



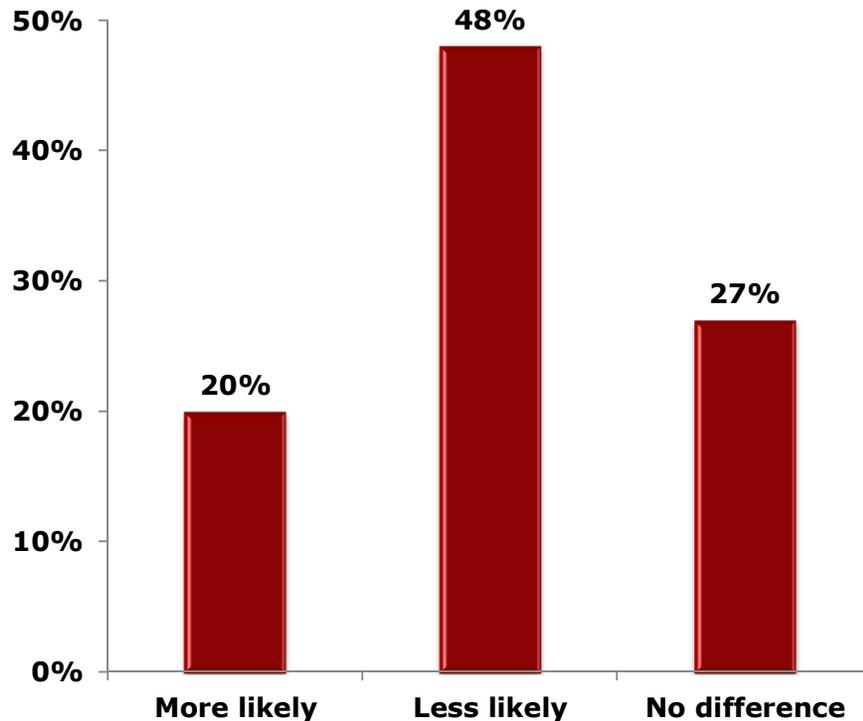
Education Initiative: *Historic Trends*



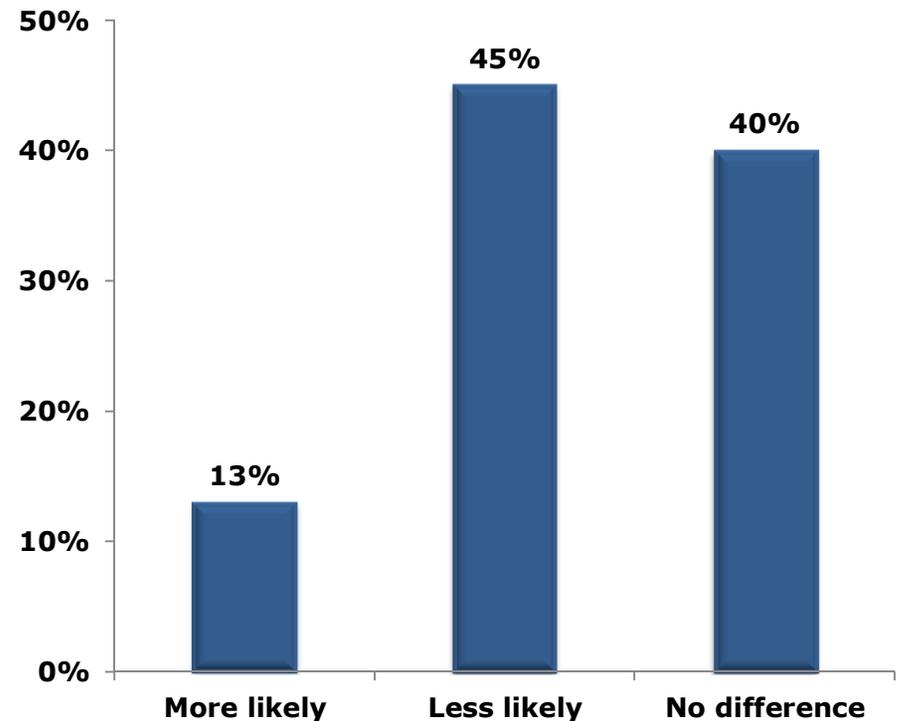
* Surveys prior to September 2013 included the phrase "...this type of general business tax..." instead of "...the additional tax on non-gaming revenues..."

Message Testing: *Education Initiative*

“There is nothing in the Education Initiative requiring that the funds raised by the margin tax have to be spent on education. After hearing this, are you more likely or less likely to vote for the Education Initiative, or does it make no difference to you?” (Q15)

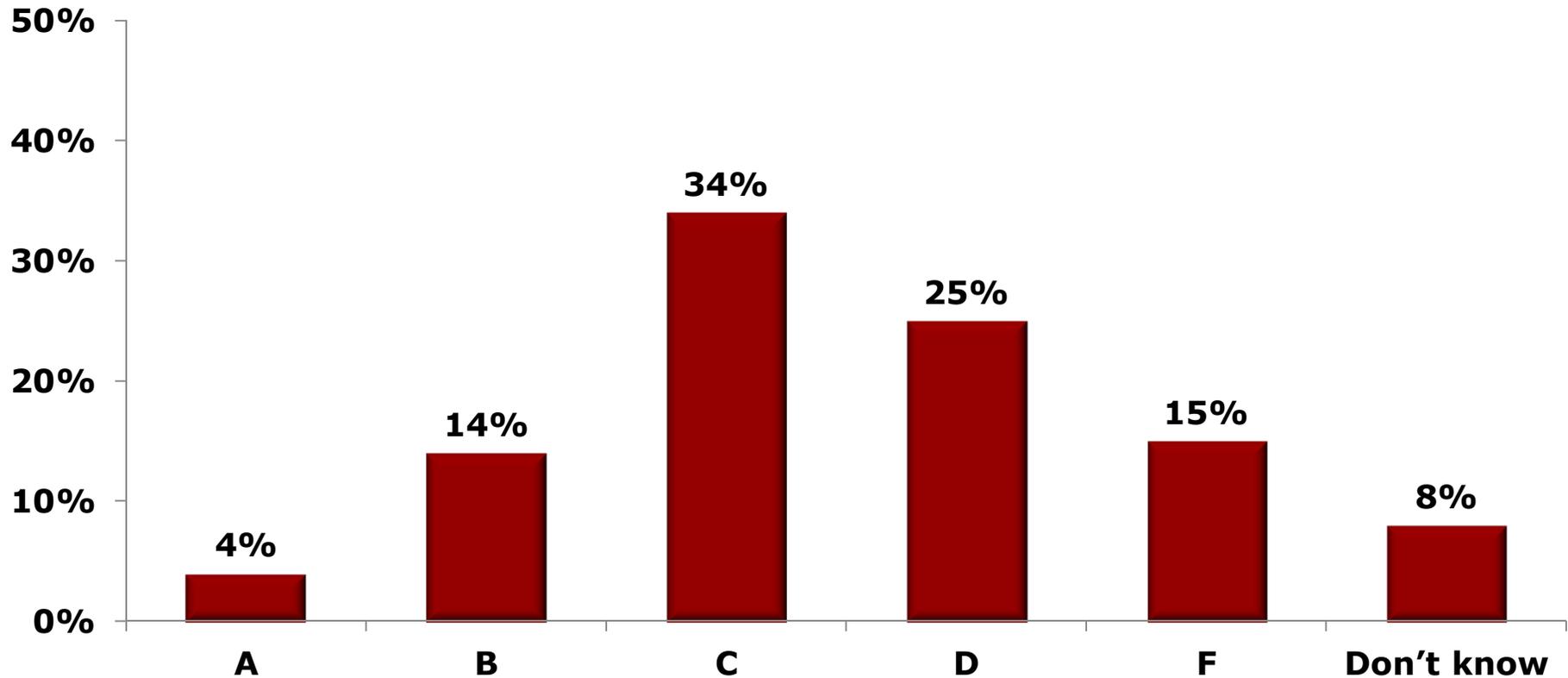


“Currently, more than one out of eight workers in Nevada is employed by businesses that have fewer than ten employees. Those small business owners are concerned that higher taxes in the proposed Education Initiative will impact their ability to stay in business. Does the possible impact of higher taxes on small businesses in Nevada make you more likely or less likely to vote for the Education Initiative, or does it make no difference to you?” (Q16)



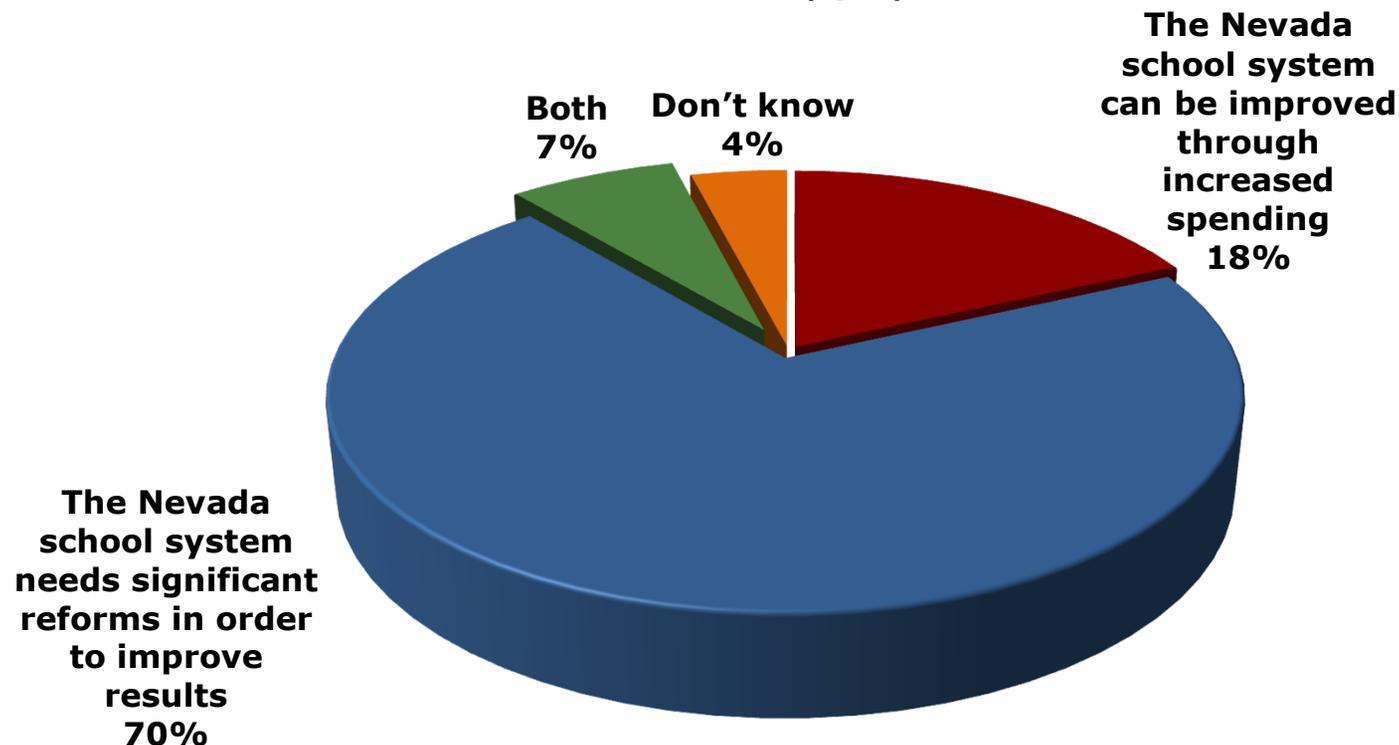
Plurality Give Schools Below Average Grades

"If you had to grade Nevada schools, Kindergarten through high school, what grade would you assign?" (Q17)

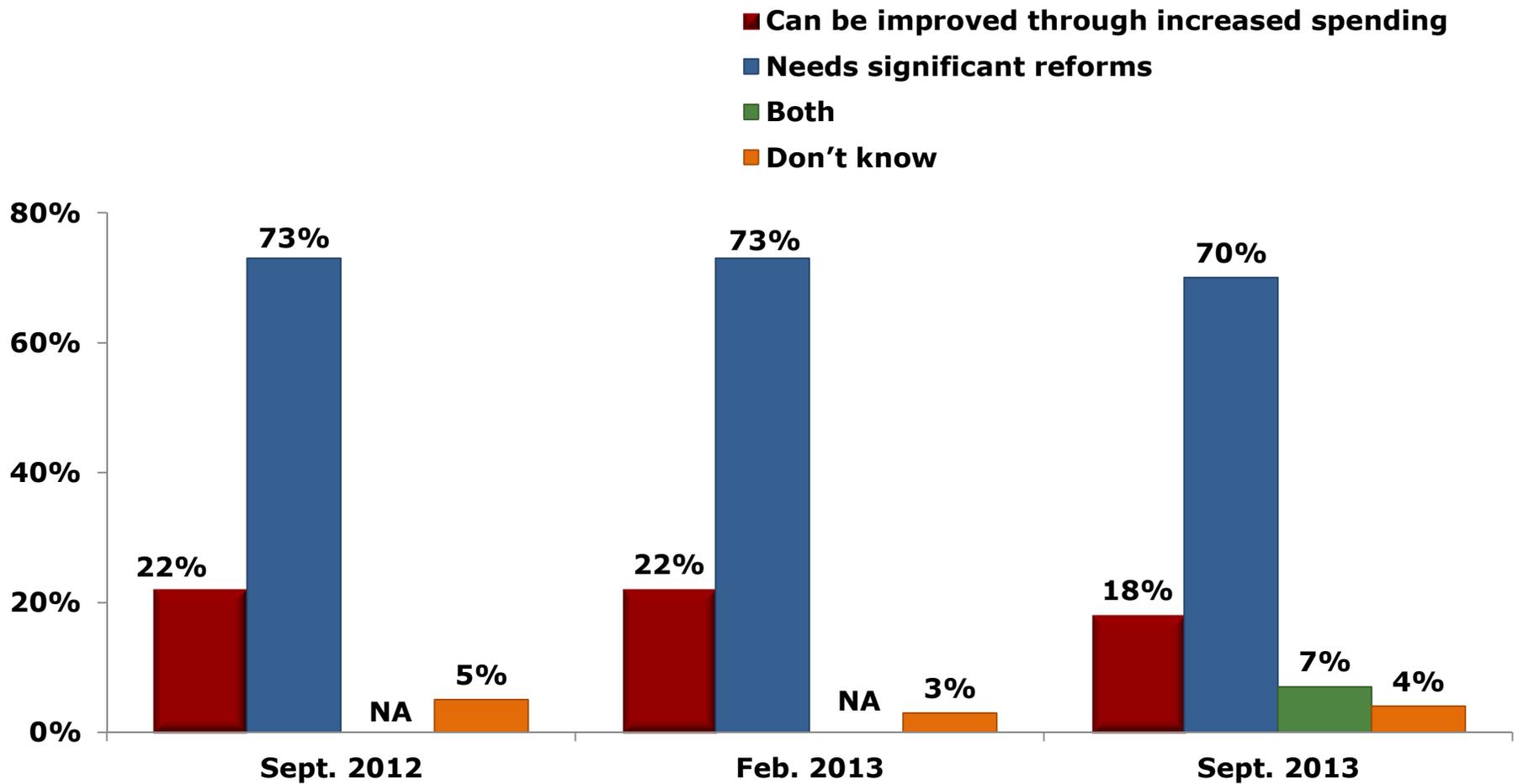


Improving Nevada Schools: *Reform, Not Just Money*

"Nevada's schools, in grades Kindergarten through high school, have below average graduation rates and below average scores on standardized tests compared to other states. Do you think that..." (Q18)

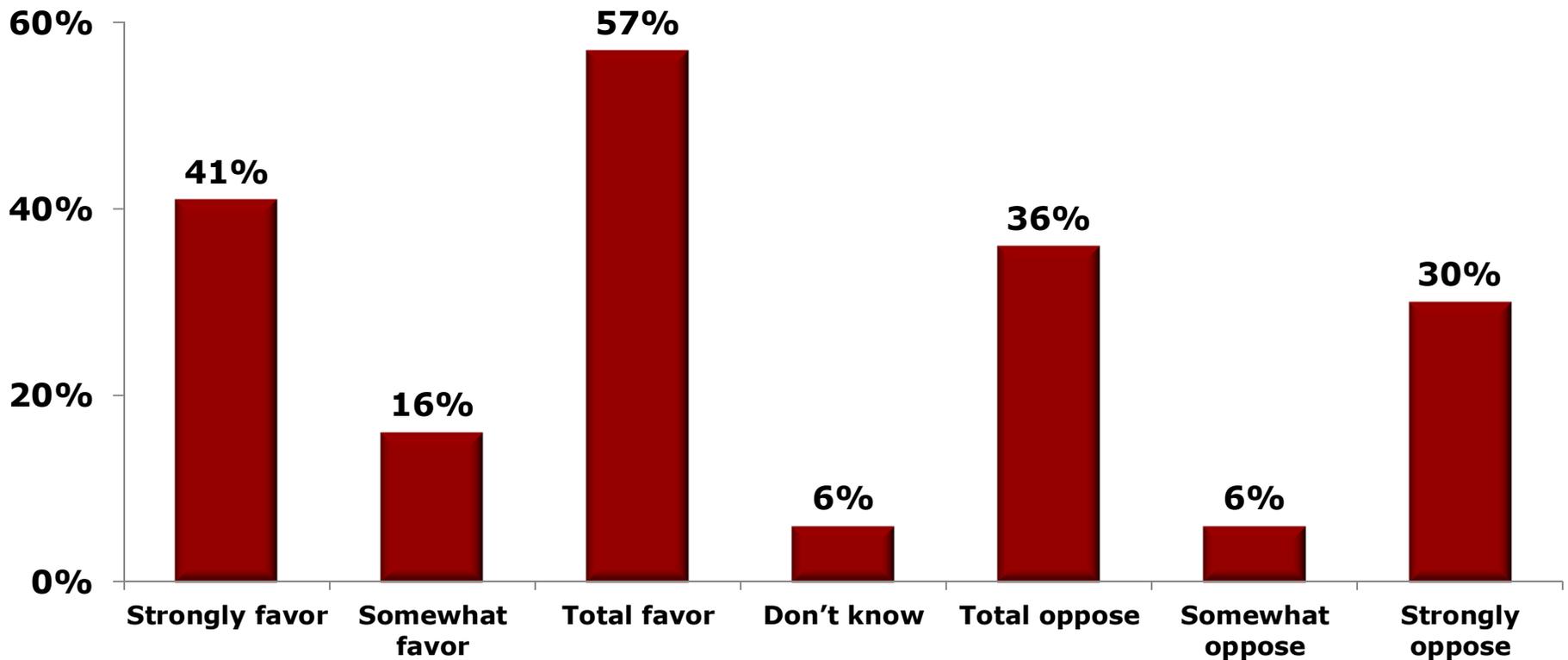


Improving Nevada Schools: *Historic Trends*

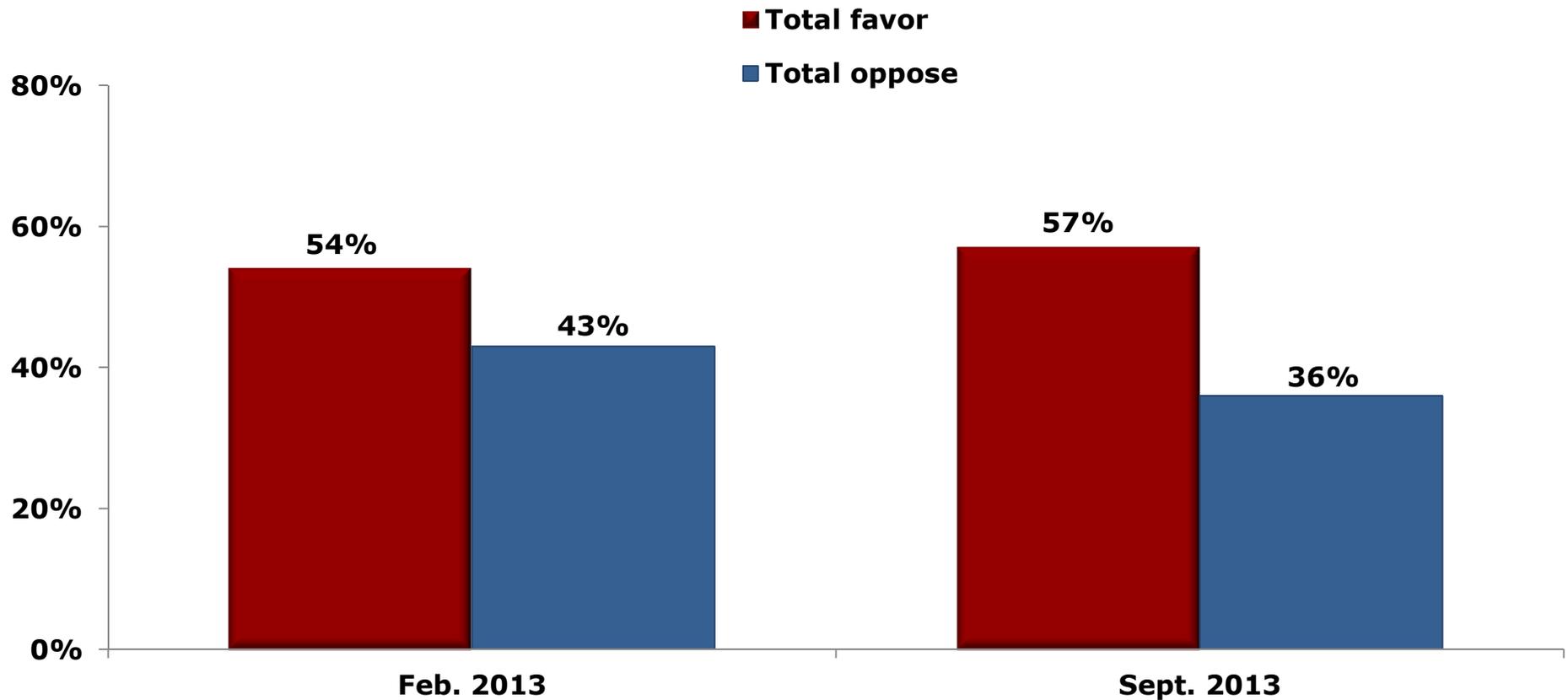


Majority Favors Same-Sex Marriage

“Would you favor or oppose removing the Protection of Marriage provision from the Nevada Constitution? Removing this provision would allow same-sex couples to legally marry in Nevada?”
(Q19)

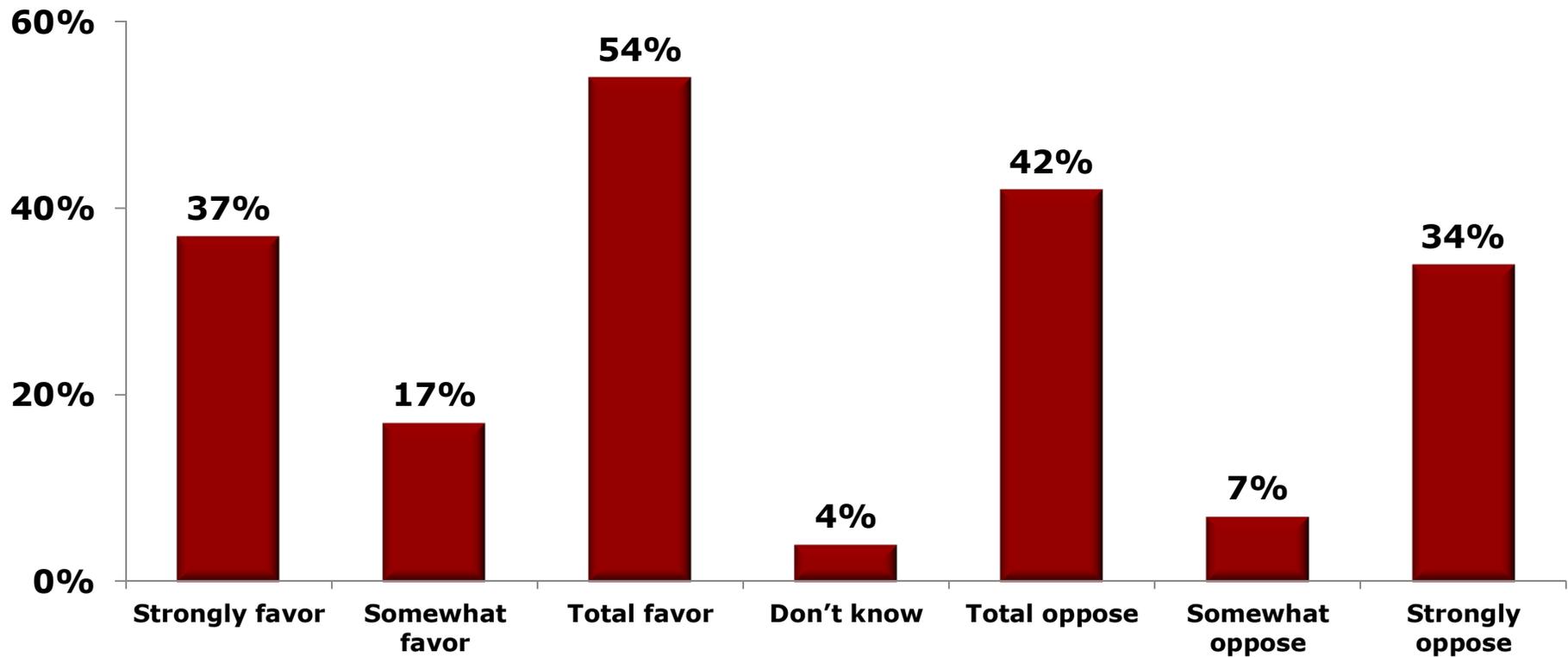


Majority Favors Same-Sex Marriage: *Historic Trends*



Narrow Majority Favors Marijuana Legalization if Revenues Used for Education

“Would you favor or oppose legalizing the sale of marijuana for recreational use in Nevada if all tax revenue generated from the sale of marijuana was used for education funding?” (Q20)

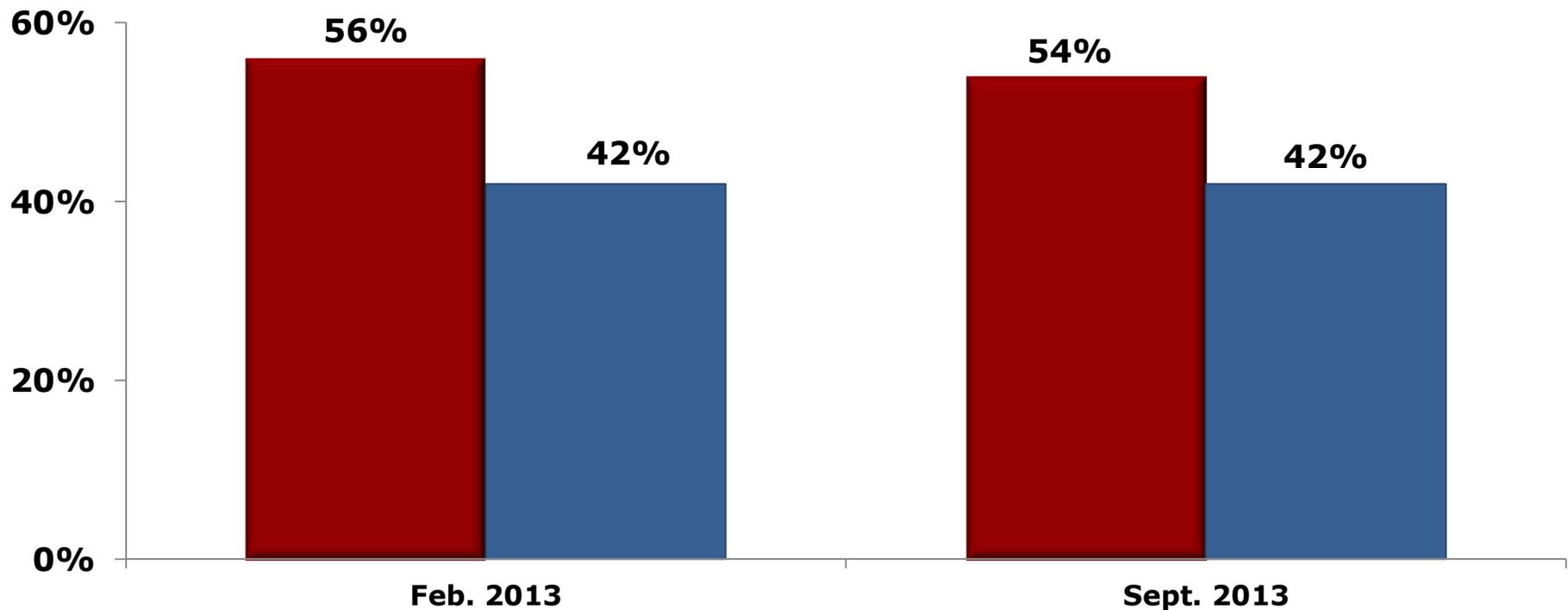


Legalize Marijuana?

Historic Trends

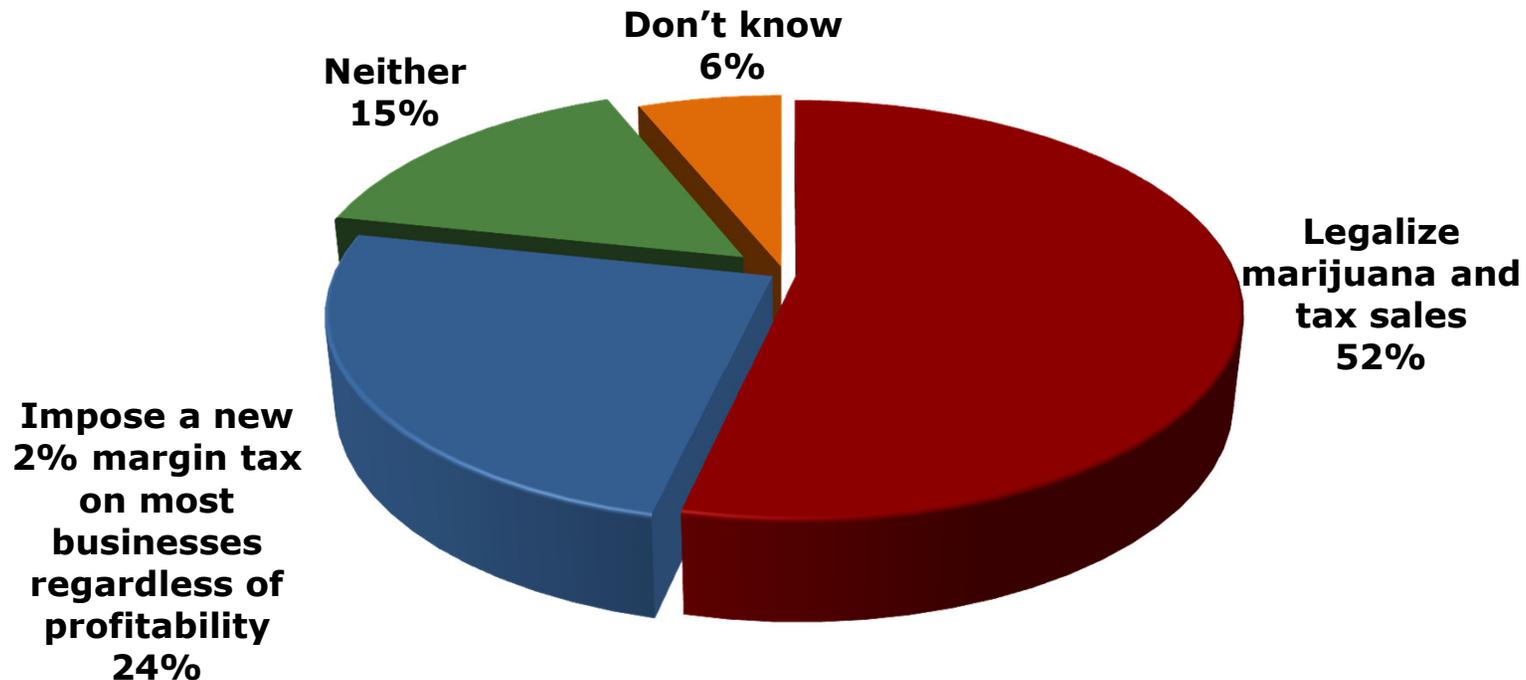


■ Total favor
■ Total oppose



Legalizing Marijuana is Preferred over 2% Margin Tax to Pay for Education

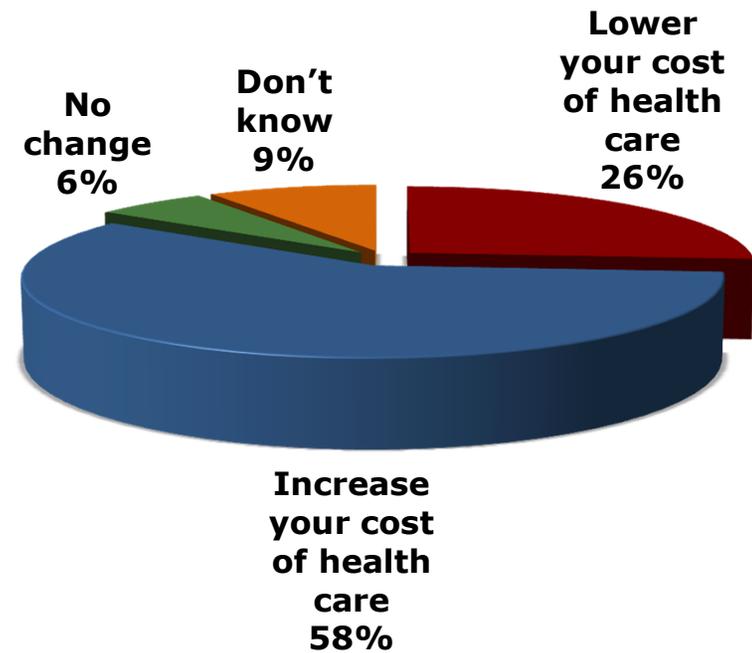
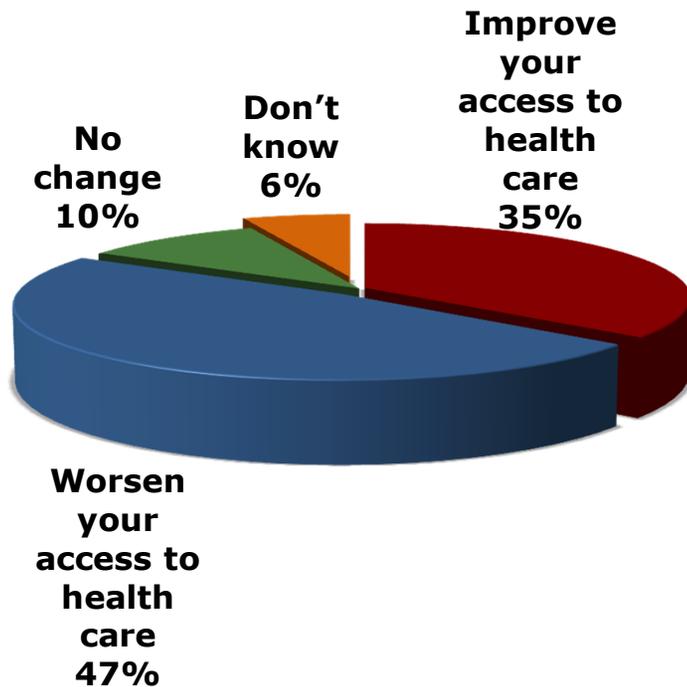
"To add more tax revenue for schools, would you prefer that Nevada..." (Q21)



Obamacare Will Worsen Access, Increase Costs

"Do you believe that the Obamacare law will..." (Q22)

"Do you believe that the Obamacare law will..." (Q23)



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