



NEVADA Statewide Survey



Key findings from a statewide survey of 500 likely voters in Nevada, with 100 cell phone interviews, conducted September 19-20, 2012.

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GOA PUBLIC OPINION
STRATEGIES

Project #121330



Methodology

Public Opinion Strategies is pleased to present the key findings of a statewide telephone survey conducted in Nevada. The survey was completed September 19-20, 2012, among 500 likely voters, with 100 cell phone interviews, and has a margin of error of $\pm 4.38\%$.

Glen Bolger was the principal researcher on this project. Jim Hobart was the project director, and Court Hall provided analytical support.

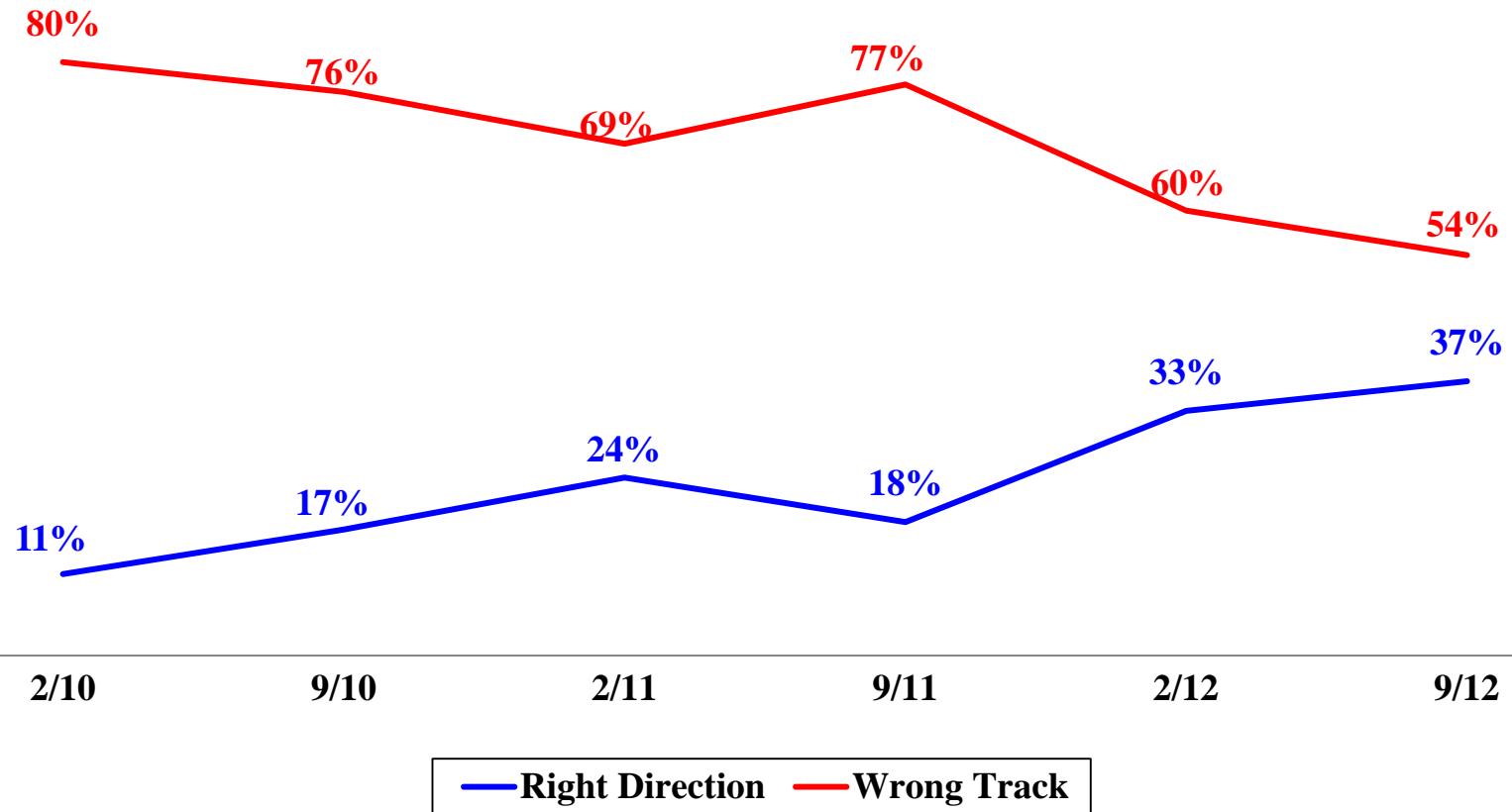


Political Environment

While Nevadans continue to be pessimistic, their mood about the state's direction has improved.

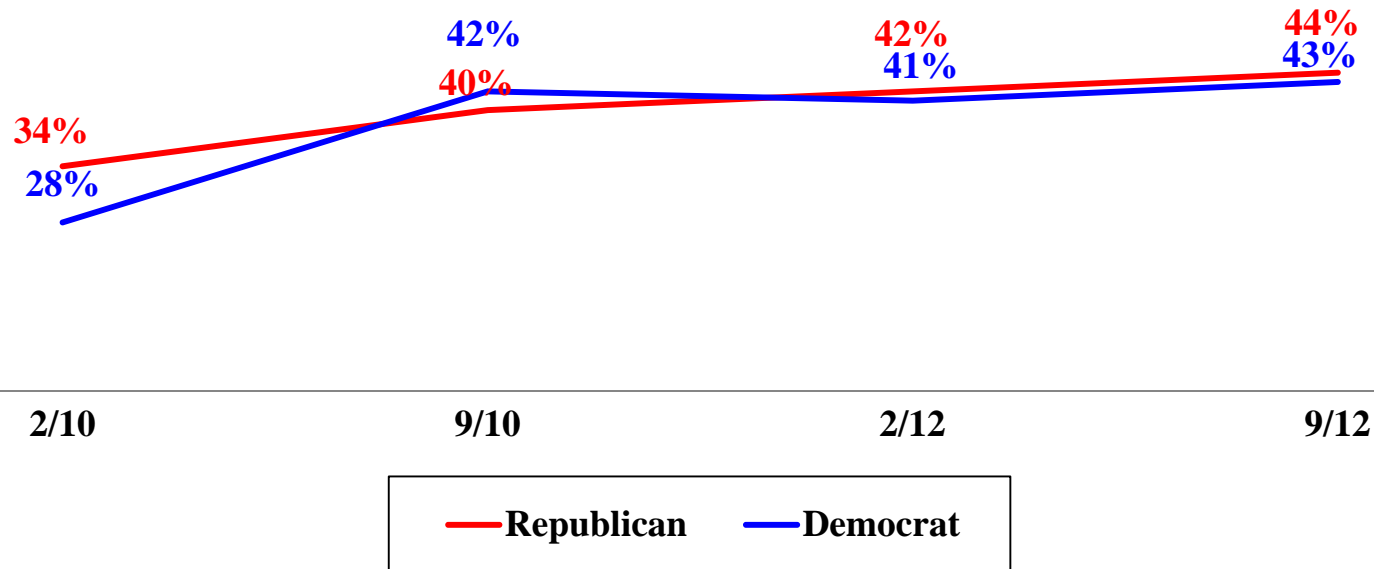
“Would you say things in Nevada are going in the right direction, or have they pretty seriously gotten off on the wrong track?”

State Mood Trend



The generic ballot remains tied.

“If the election for State Legislature were being held today, for whom would you vote...the Republican candidate OR the Democratic candidate?”

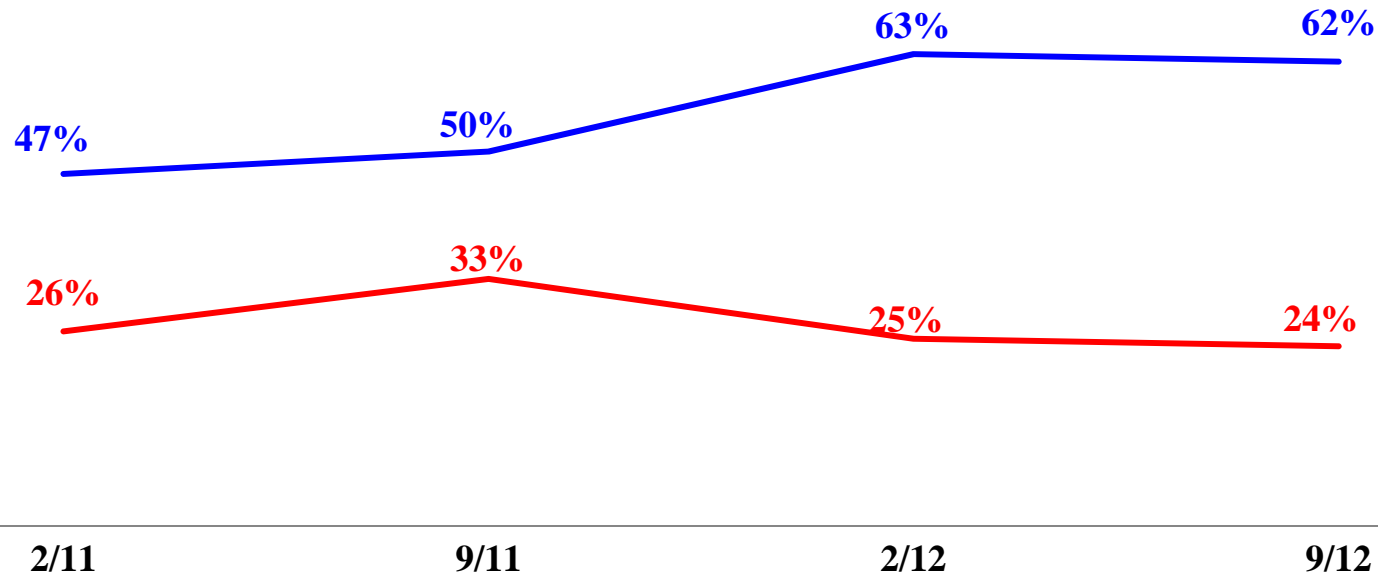


Voters continue to approve of the Governor's job performance.

“Do you approve or disapprove of the job Brian Sandoval is doing as Governor?”

Sandoval Approval Trend

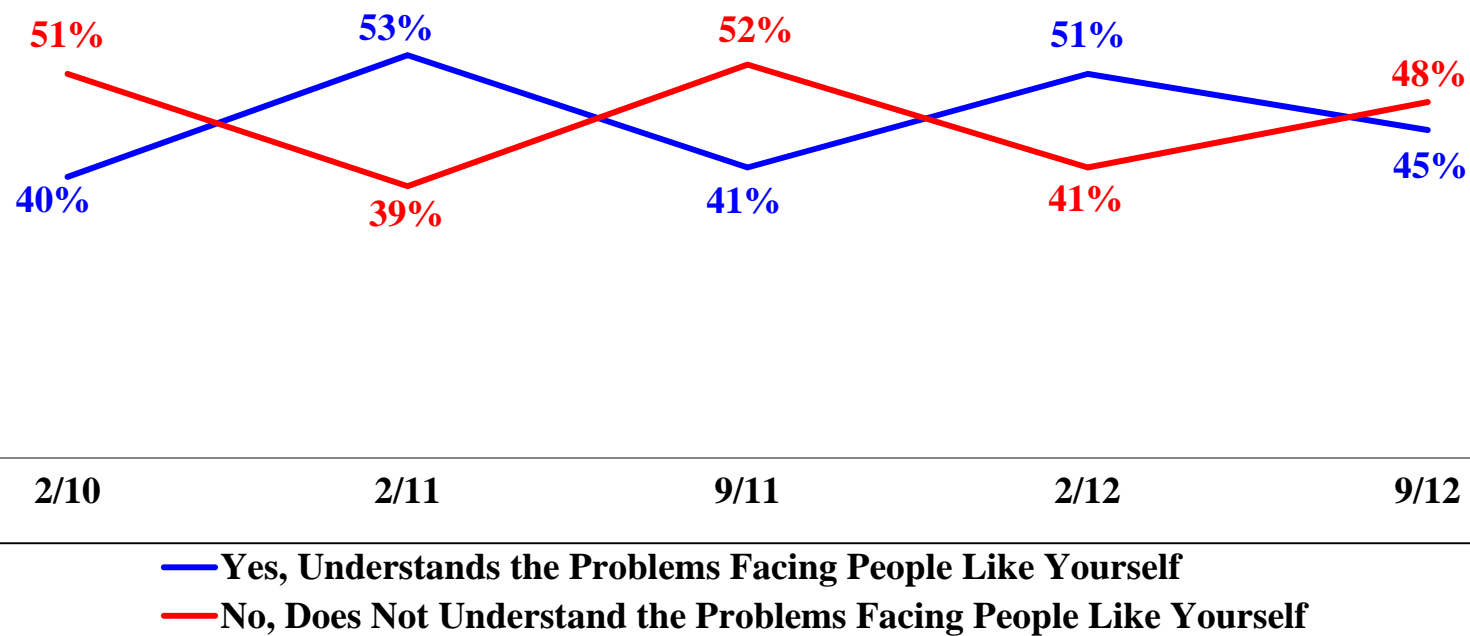
Strongly Approve: 23%
Strongly Disapprove: 10%



— Total Approve — Total Disapprove

Voters are divided over whether the Governor understands the problems facing people like them.

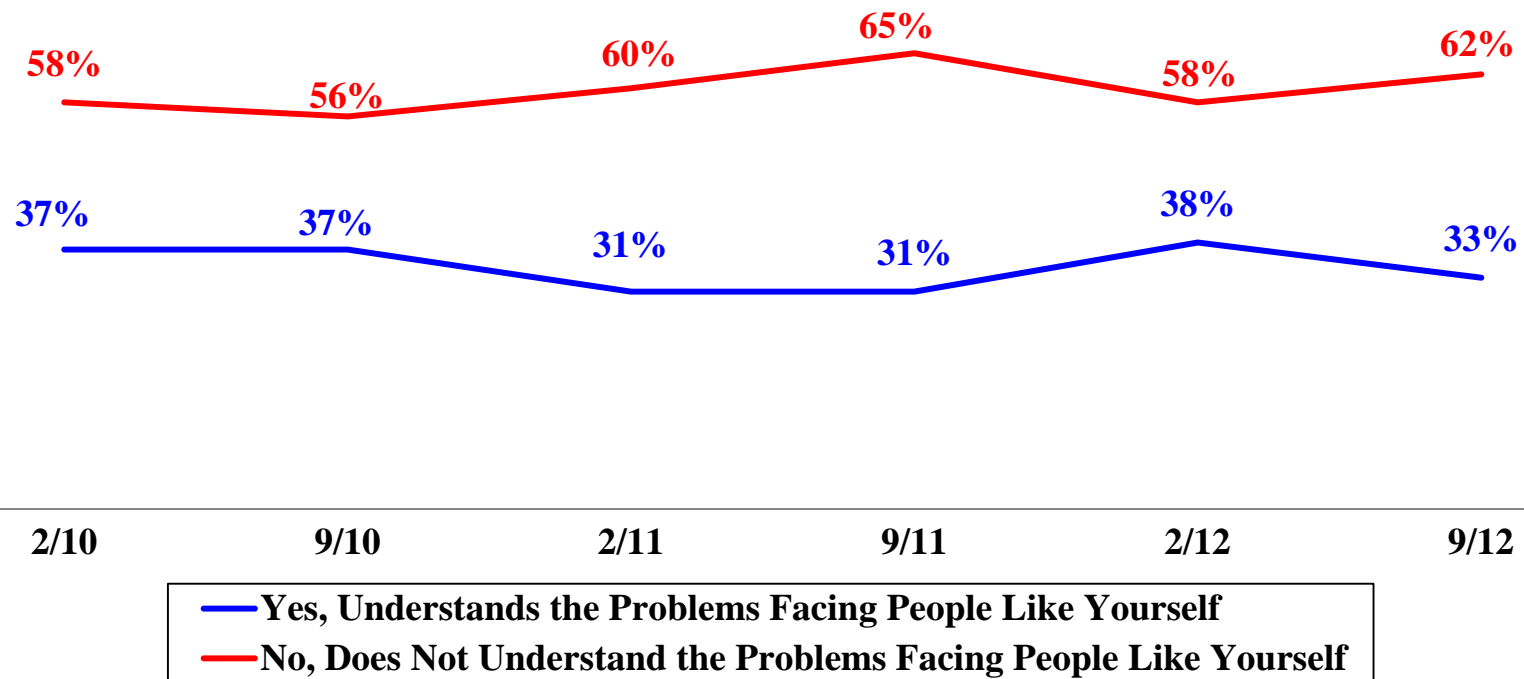
“Do you think the Governor understands the problems facing people like yourself, or do you think he does not understand the problems facing people like yourself?”



*2/10 poll taken while Jim Gibbons was Governor
^Split Sample (N=251)

A large majority of Nevada voters continue to believe their State Legislators do not understand their problems.

“Do you think your state legislators understand the problems facing people like yourself, or do you think they do not understand the problems facing people like yourself?”

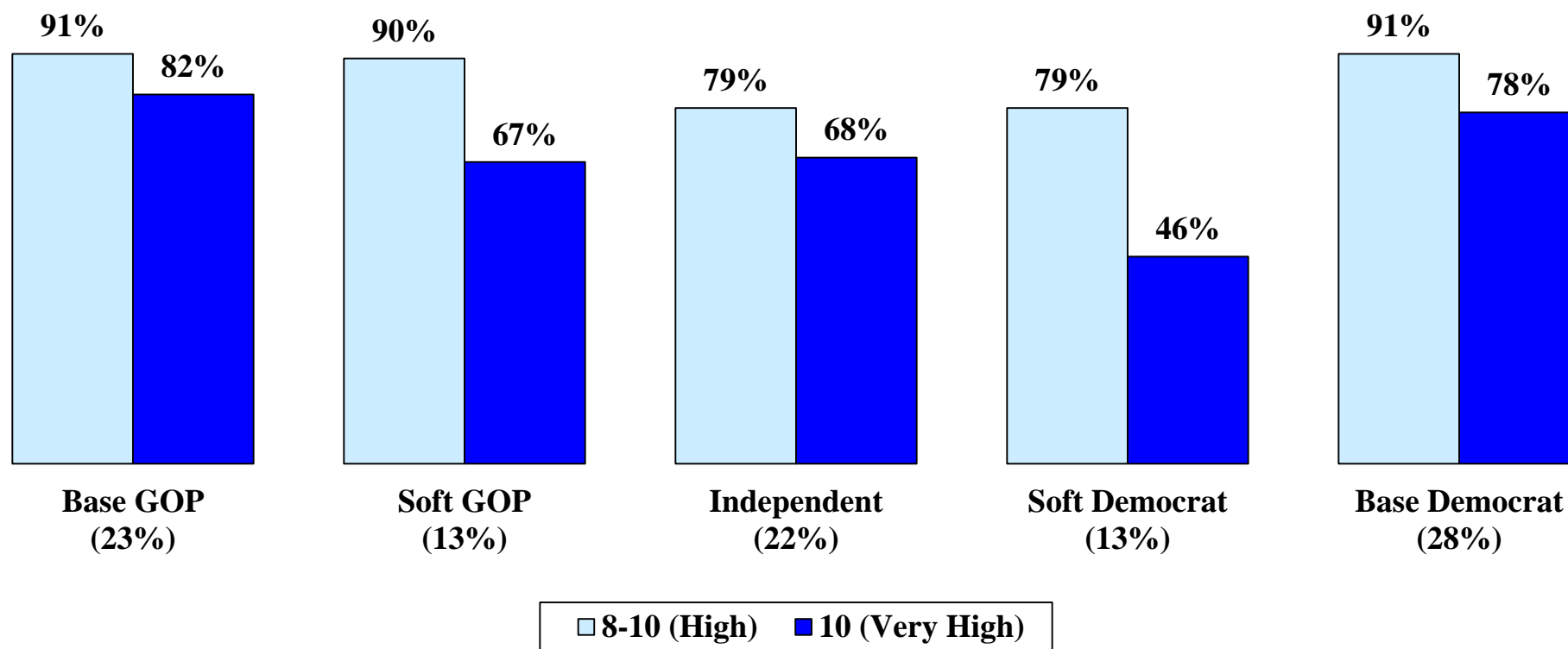


[^]Split Sample (N=250)

Base GOPers and base Democrats are most interested in the upcoming election.

“And how interested are you in the election for such offices as President, U.S. Senate, and U.S. Congress? Please rate your interest from one to ten, with one meaning that you have no interest in this election and ten meaning that you are extremely interested. Of course, you can choose any number between one and ten.”

By Party



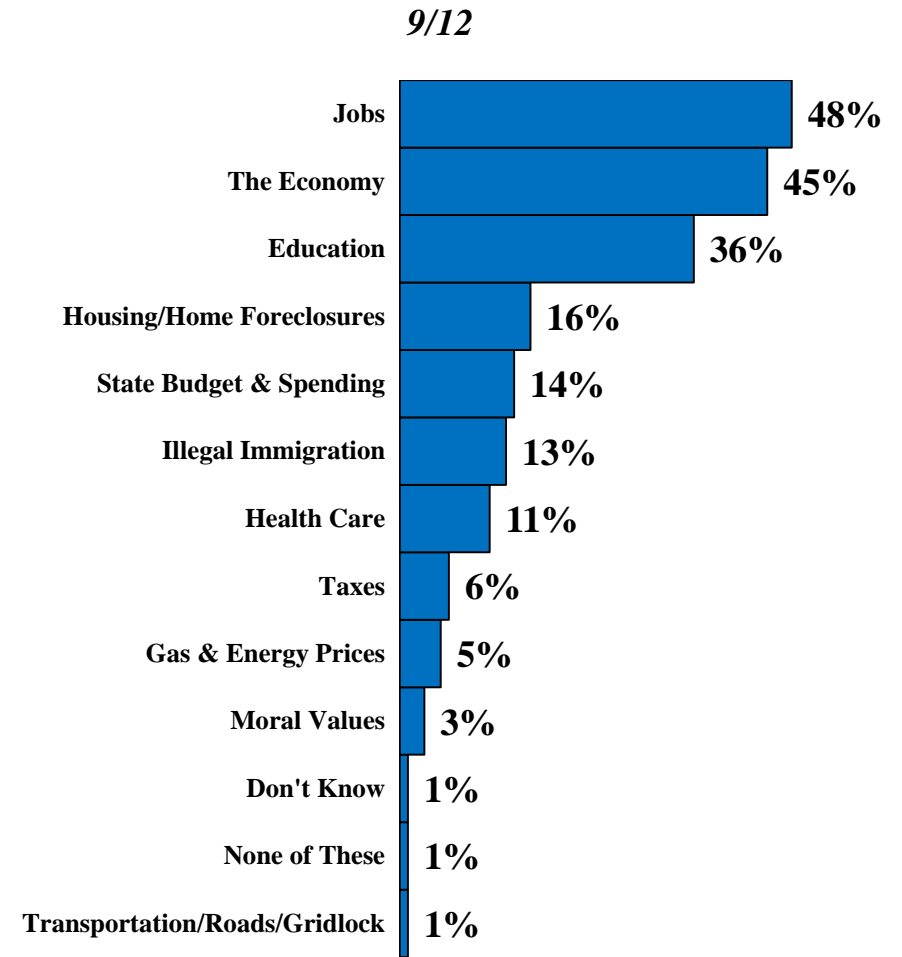
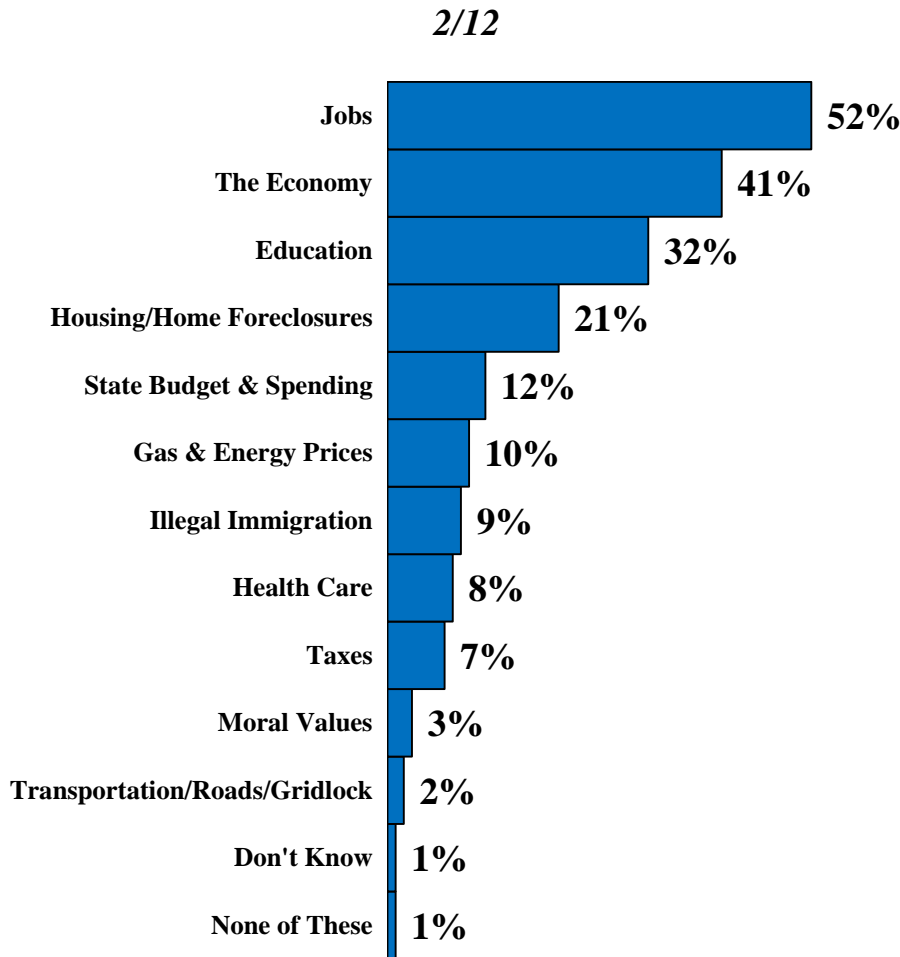


Issues

Nevadans say the economy, jobs and education should be the top issues for the Governor and State Legislature.

“Which ONE of the following issues should be the top priority of Nevada’s Governor and State Legislature? And which of the following is the NEXT most important priority?”

Combined Choices



Jobs and the economy are the top issues for Independents.

By Party

Base GOP (23%)	Soft GOP (13%)	Independent (22%)	Soft Democrat (13%)	Base Democrat (28%)
The Economy (53%)	The Economy (53%)	Jobs (56%)	The Economy (60%)	Education (63%)
Jobs (49%)	Jobs (48%)	The Economy (44%)	Jobs (49%)	Jobs (41%)
Illegal Immigration (22%)	Education (26%)	Education (28%)	Education (33%)	The Economy (27%)
State Budget & Spending (21%)	Housing/Home Foreclosures (18%)	Housing/Home Foreclosures (17%)	Housing/Home Foreclosures (19%)	Health Care (19%)



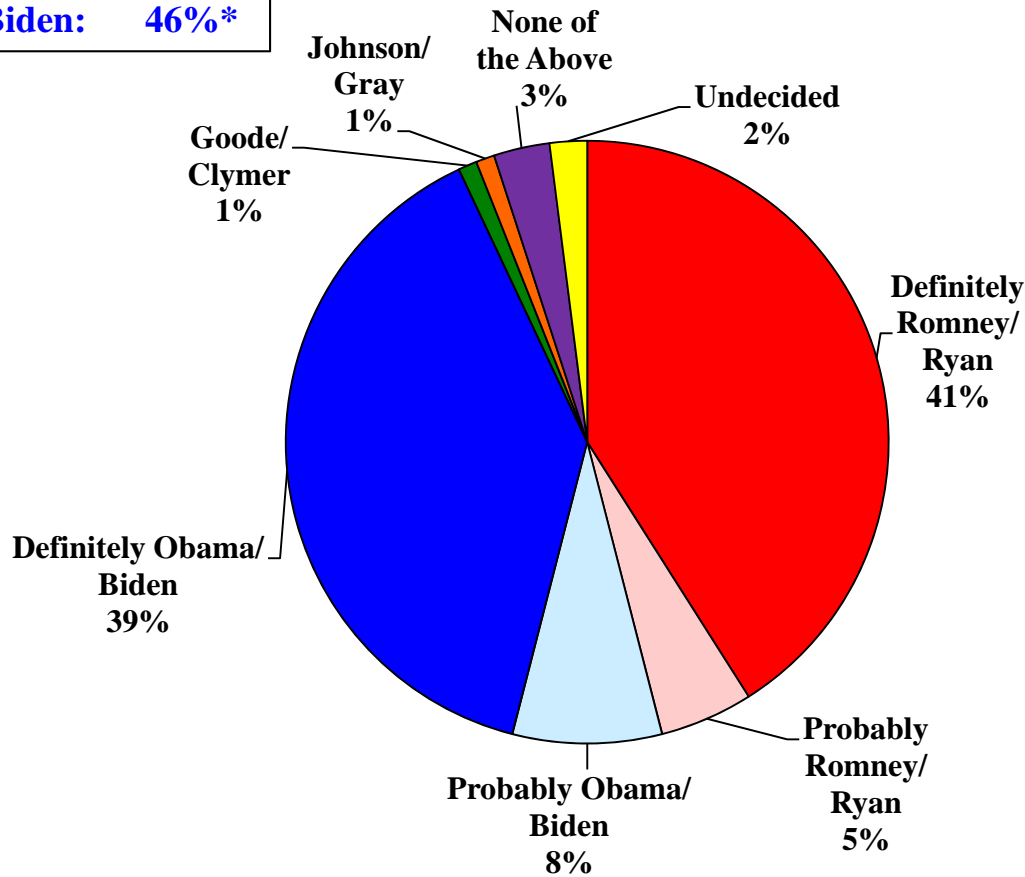
Ballot Tests

The Presidential race is tied.

“If the election for President were being held today, for whom would you vote...

Mitt Romney and Paul Ryan, Republicans; Barack Obama and Joe Biden, Democrats; Virgil Goode and Jim Clymer, Independent American; Gary Johnson and James Gray, Libertarians; or None of the Above?”

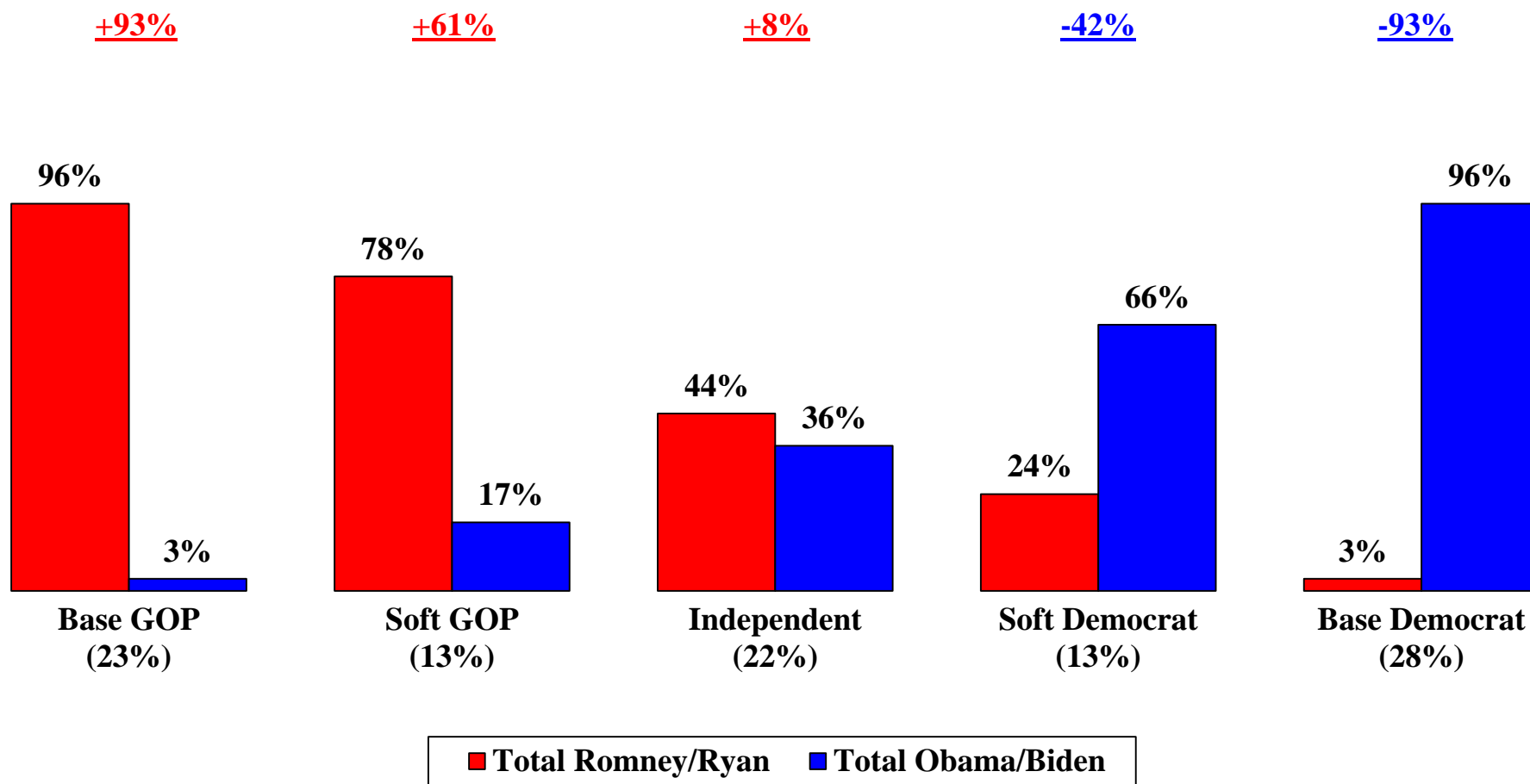
Total Romney/Ryan: 46%
Total Obama/Biden: 46%*



**Denotes Rounding*

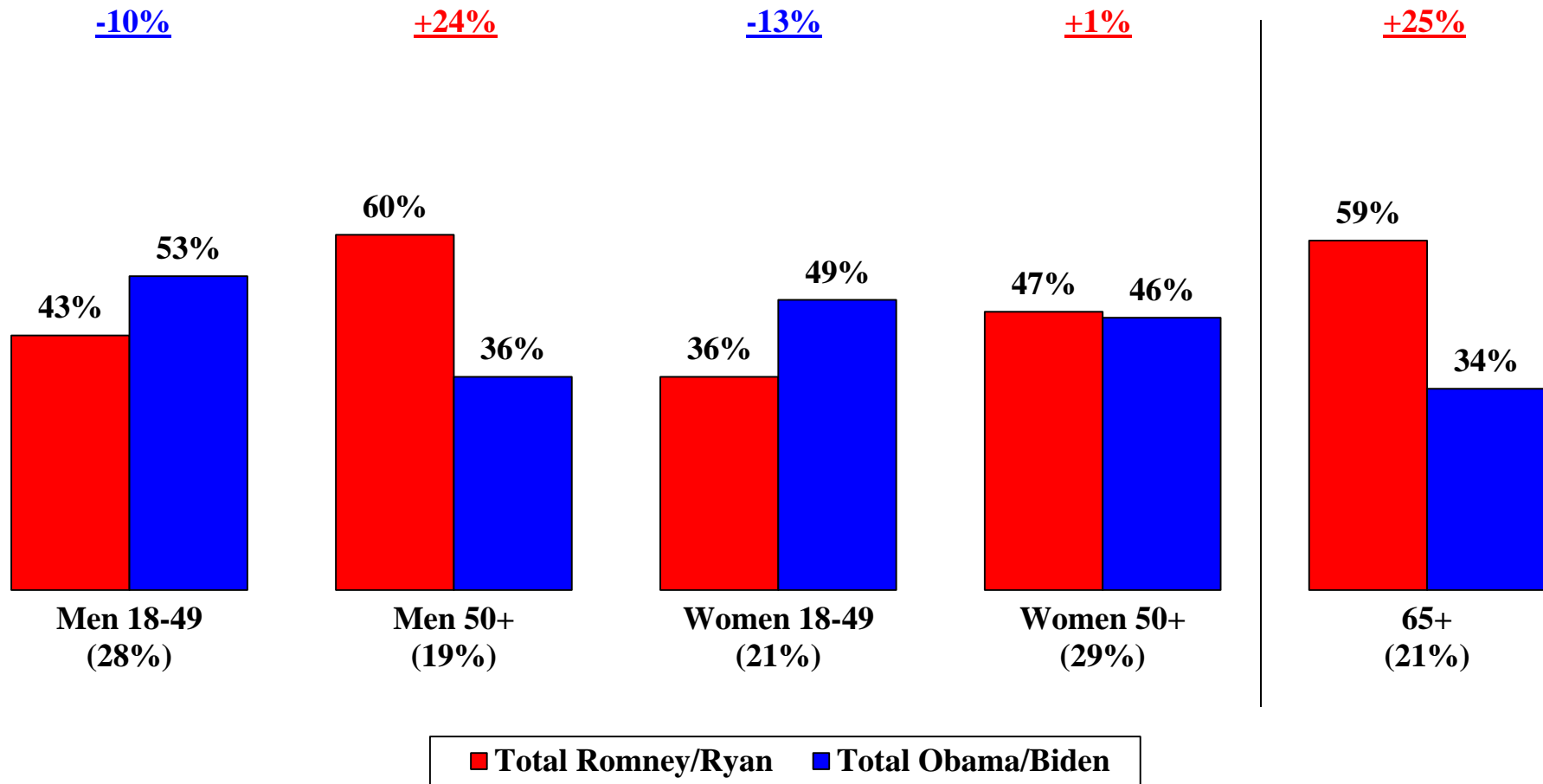
Romney leads among Independents.

Romney vs. Obama Ballot by Party



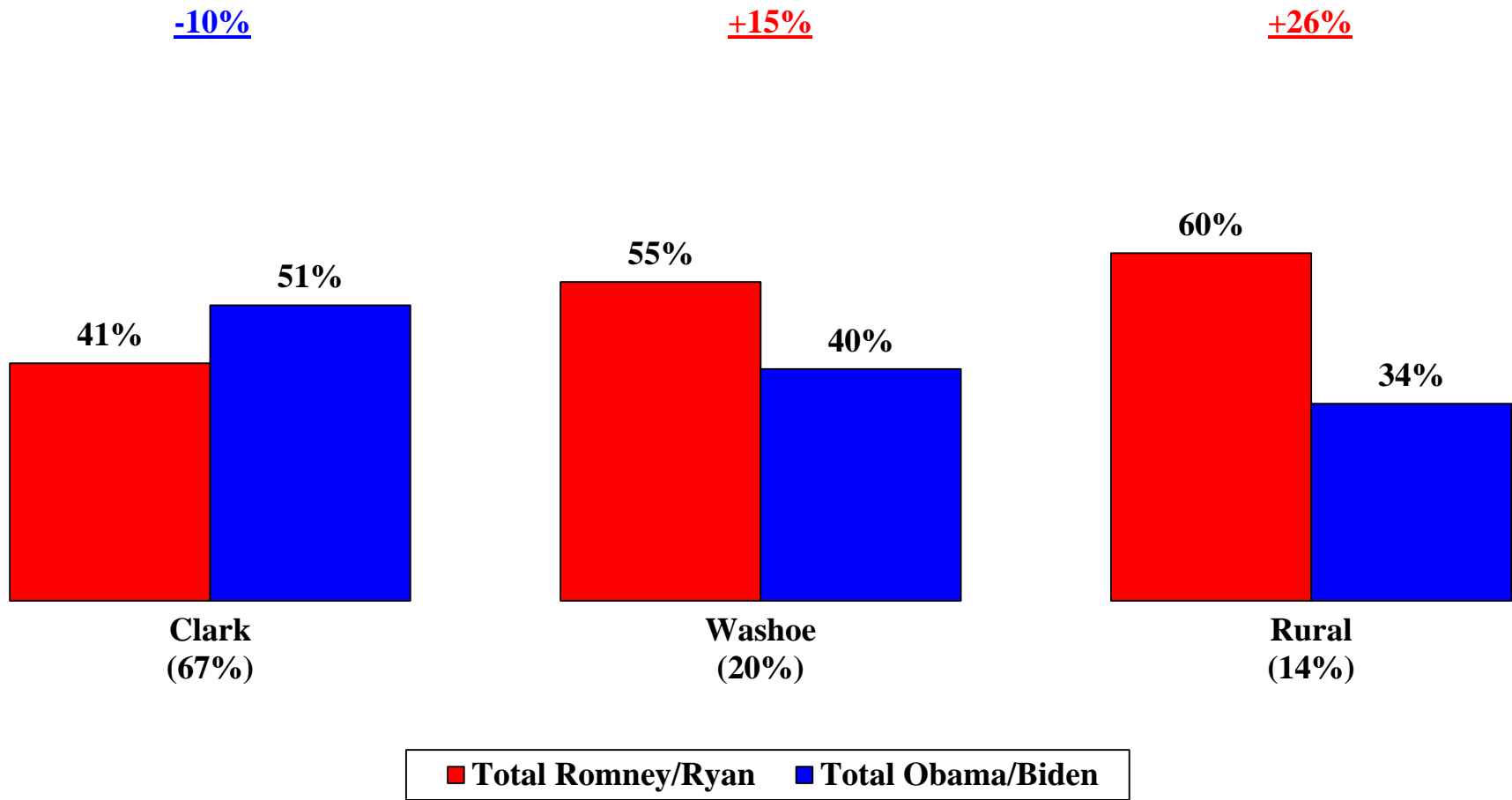
Romney leads big among older men and seniors, while Obama leads among younger voters.

Romney vs. Obama Ballot by Gender/Age + Seniors



Romney leads in Washoe County and the rural parts of the state, while Obama leads in Clark County.

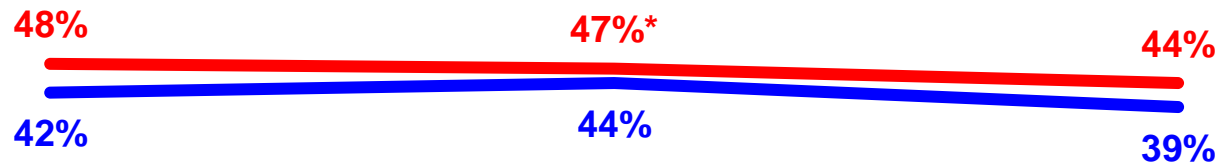
Romney vs. Obama Ballot by Region



Heller continues to lead on the Senate ballot.

*“If the election for U.S. Senate were being held today, for whom would you vote...
Dean Heller, Republican; Shelley Berkley, Democrat; David VanderBeek, Independent American;
or None of the Above?”*

<u>Intensity</u>	
Definitely Heller:	37%
Definitely Berkley:	32%



9/11

2/12

9/12

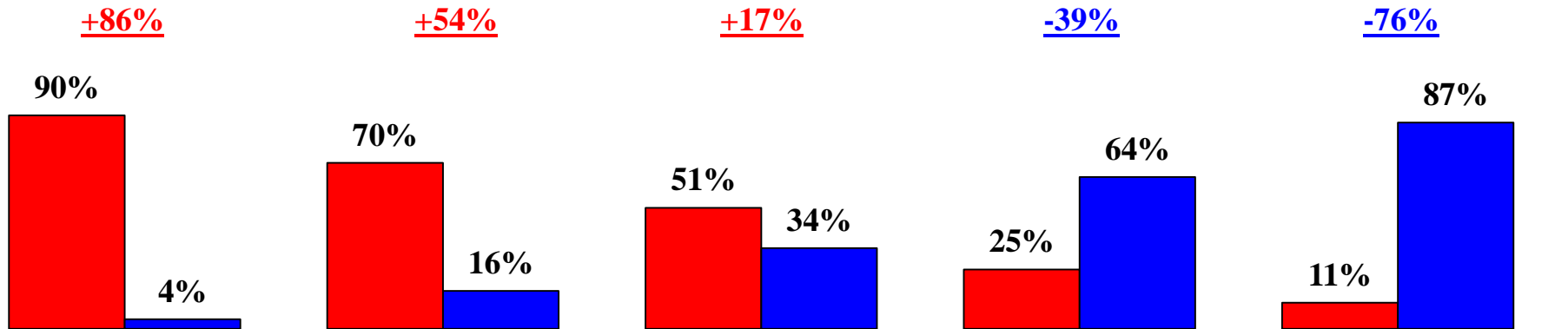
Heller: ■ Berkley: ■

**Denotes Rounding*

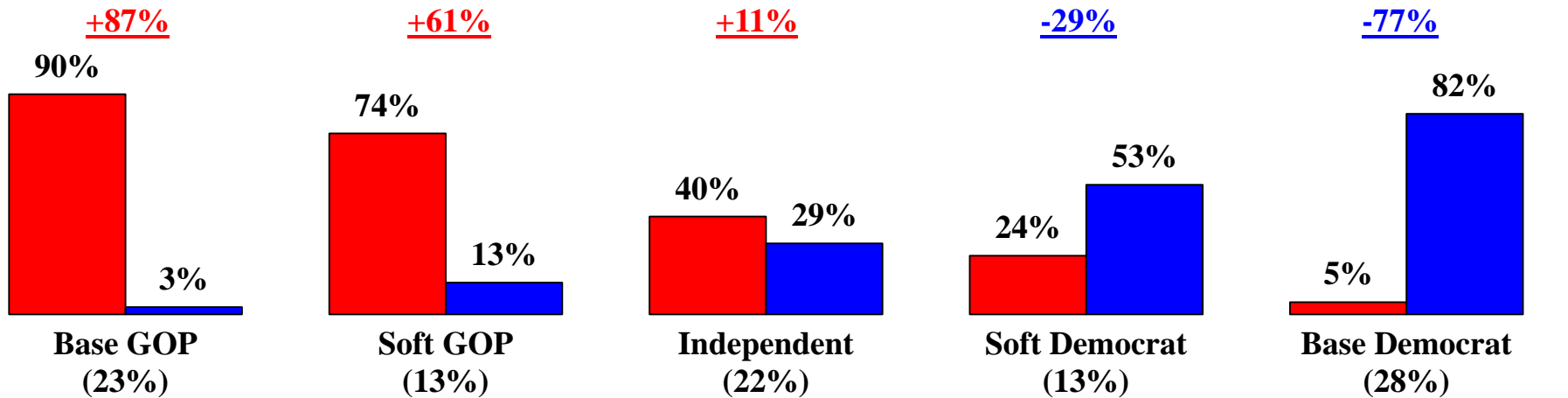
Heller continues to lead among Independents.

Heller vs. Berkley Ballot Trend by Party

2/12



9/12

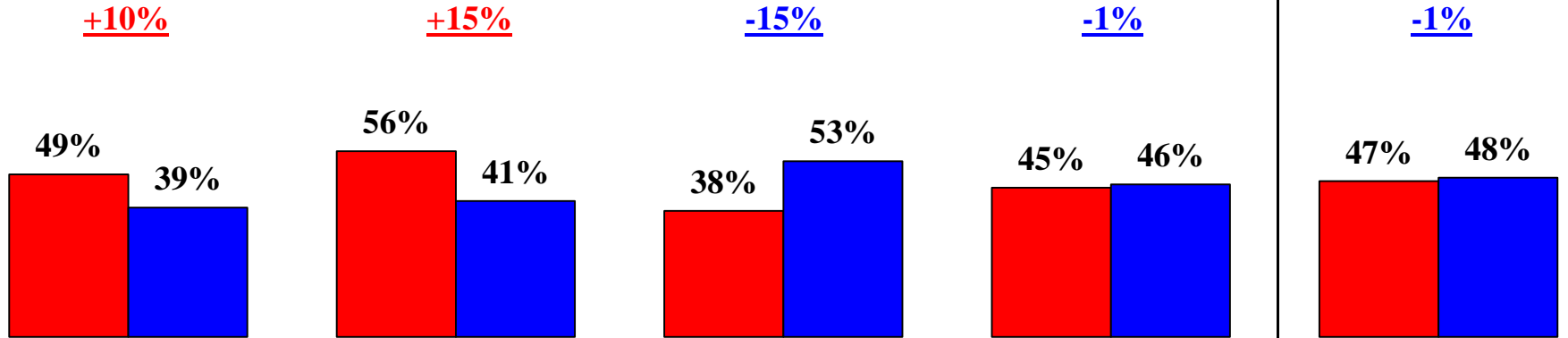


■ Total Heller ■ Total Berkley

Seniors are now firmly behind Heller. Younger voters are split.

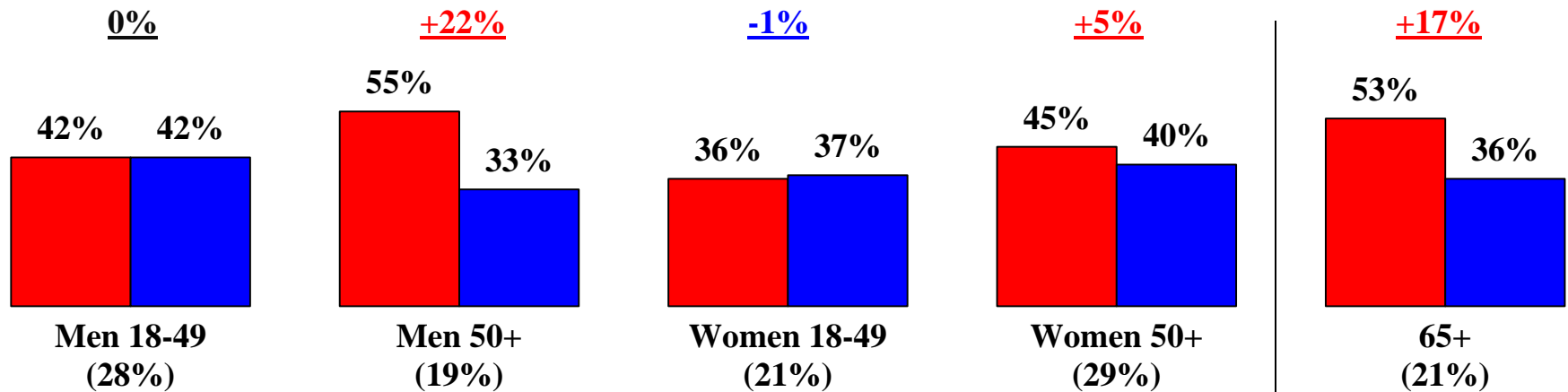
Heller vs. Berkley Ballot Trend by Gender/Age + Seniors

2/12



-1%

9/12

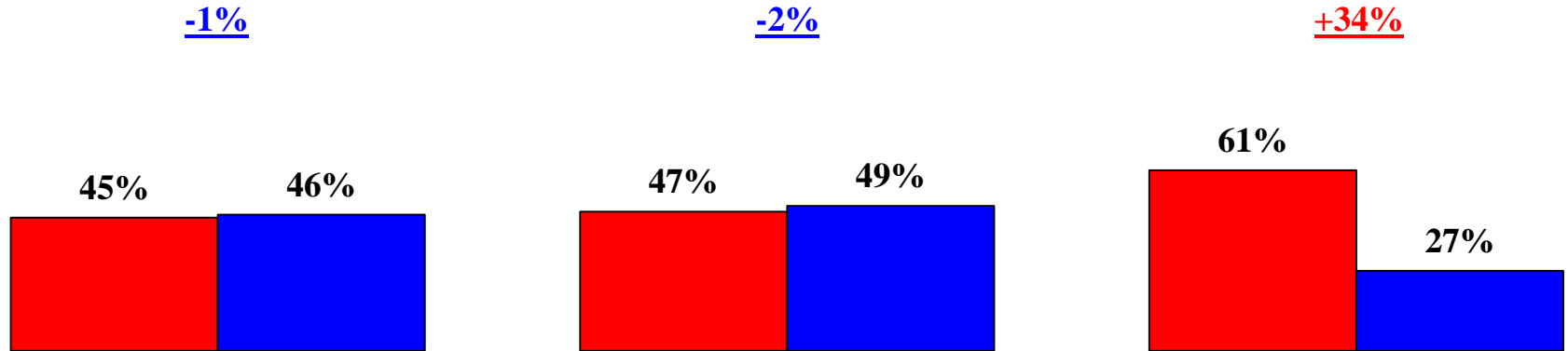


■ Total Heller ■ Total Berkley

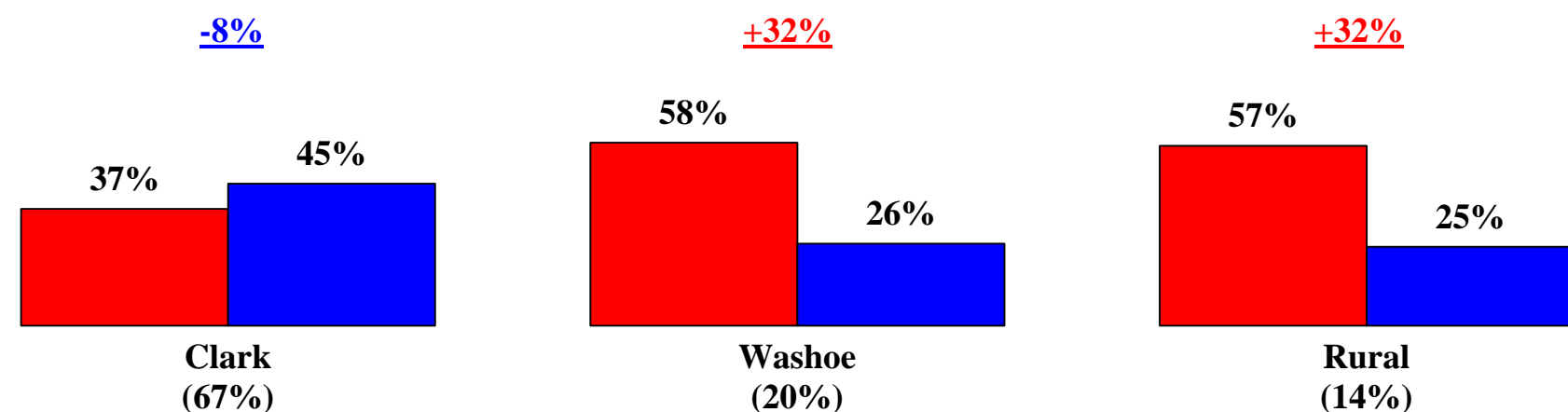
Heller now leads big in Washoe County; his support in Clark County has dropped since February.

Heller vs. Berkley Ballot Trend by Region

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Clark
(67%)

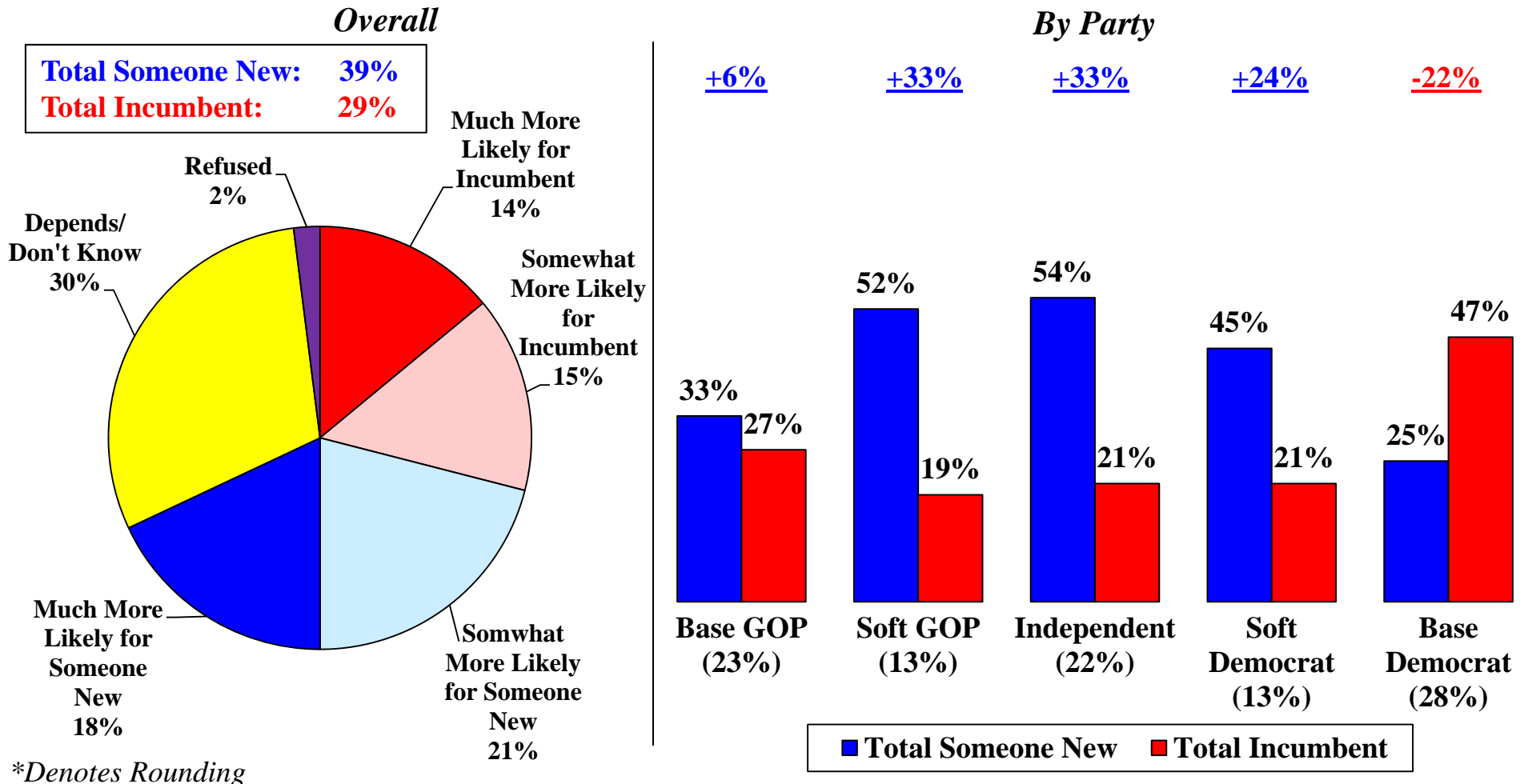
Washoe
(20%)

Rural
(14%)

■ Total Heller ■ Total Berkley

Swing voters are looking for someone new, while base voters are more supportive of incumbents.

“Thinking about the state and local elections this November, are you more likely to vote for the incumbent, or more likely to vote for someone new?”



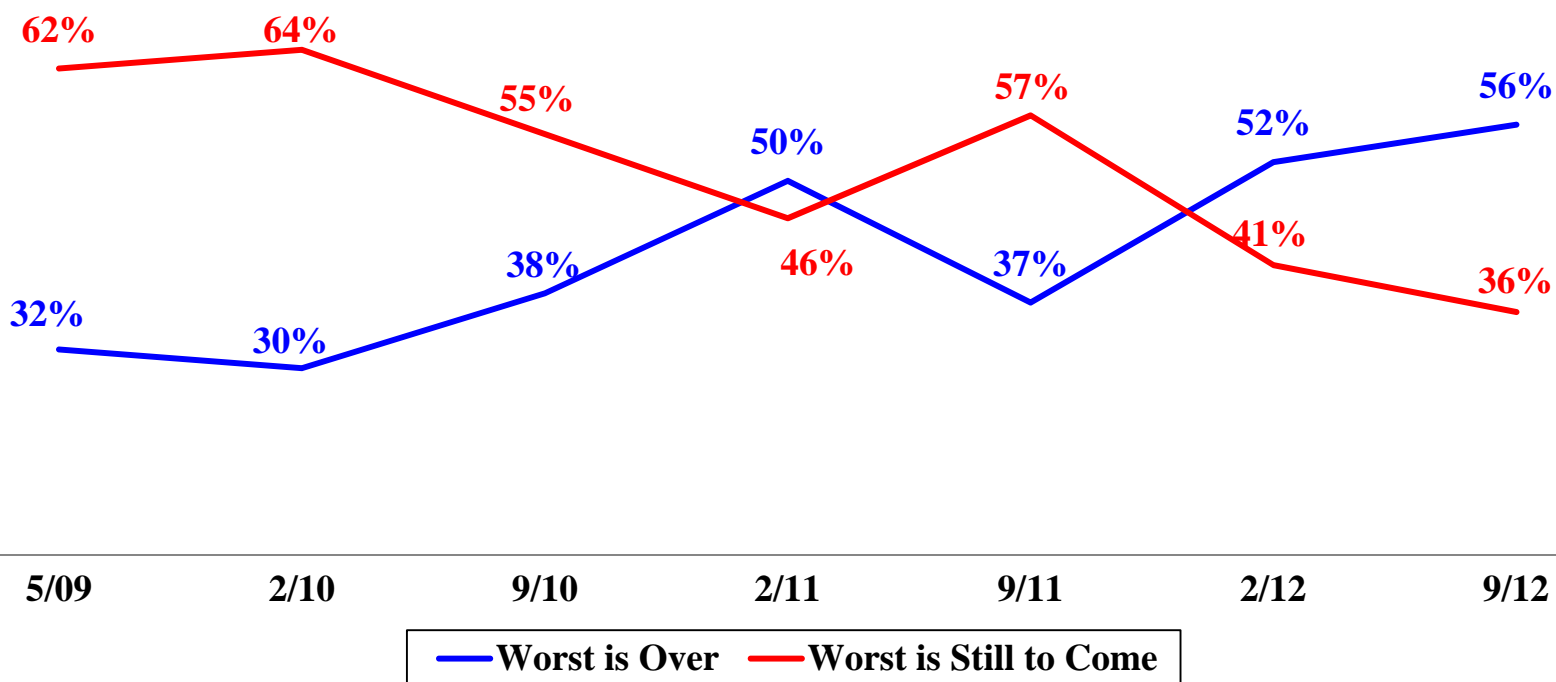
*Denotes Rounding



The Economy & Unemployment

Nevada voters increasingly believe the worst is over for the state.

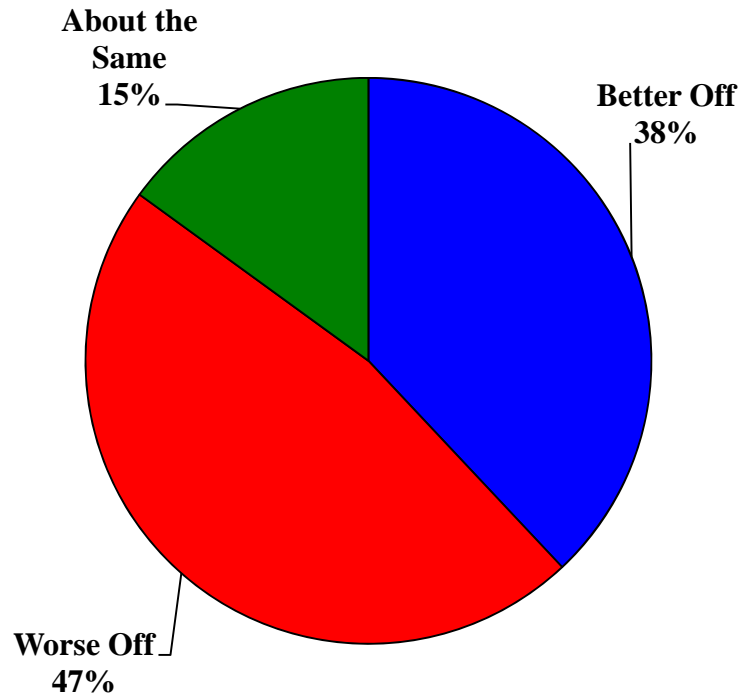
“Nevada has recently been going through a difficult time. Do you feel that the worst is over or is the worst is still to come?”



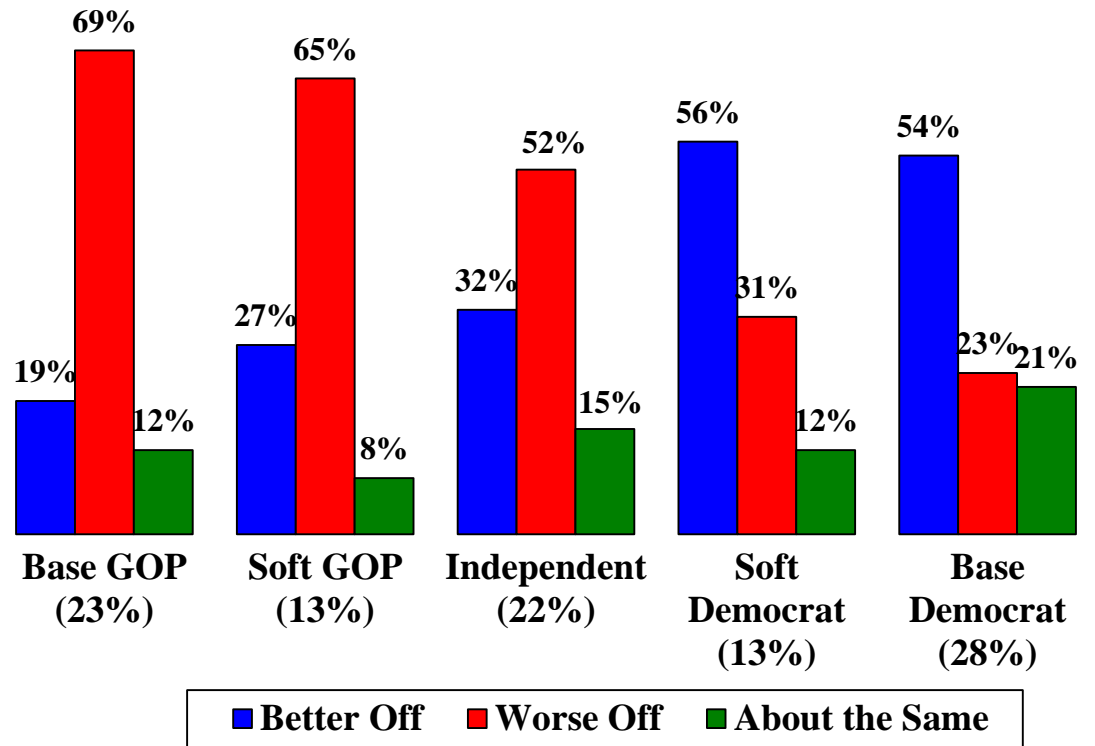
A majority of Independents say they are worse off than they were four years ago.

“And, thinking now just about you, would you say you are better off or worse off than you were four years ago?”

Overall



By Party

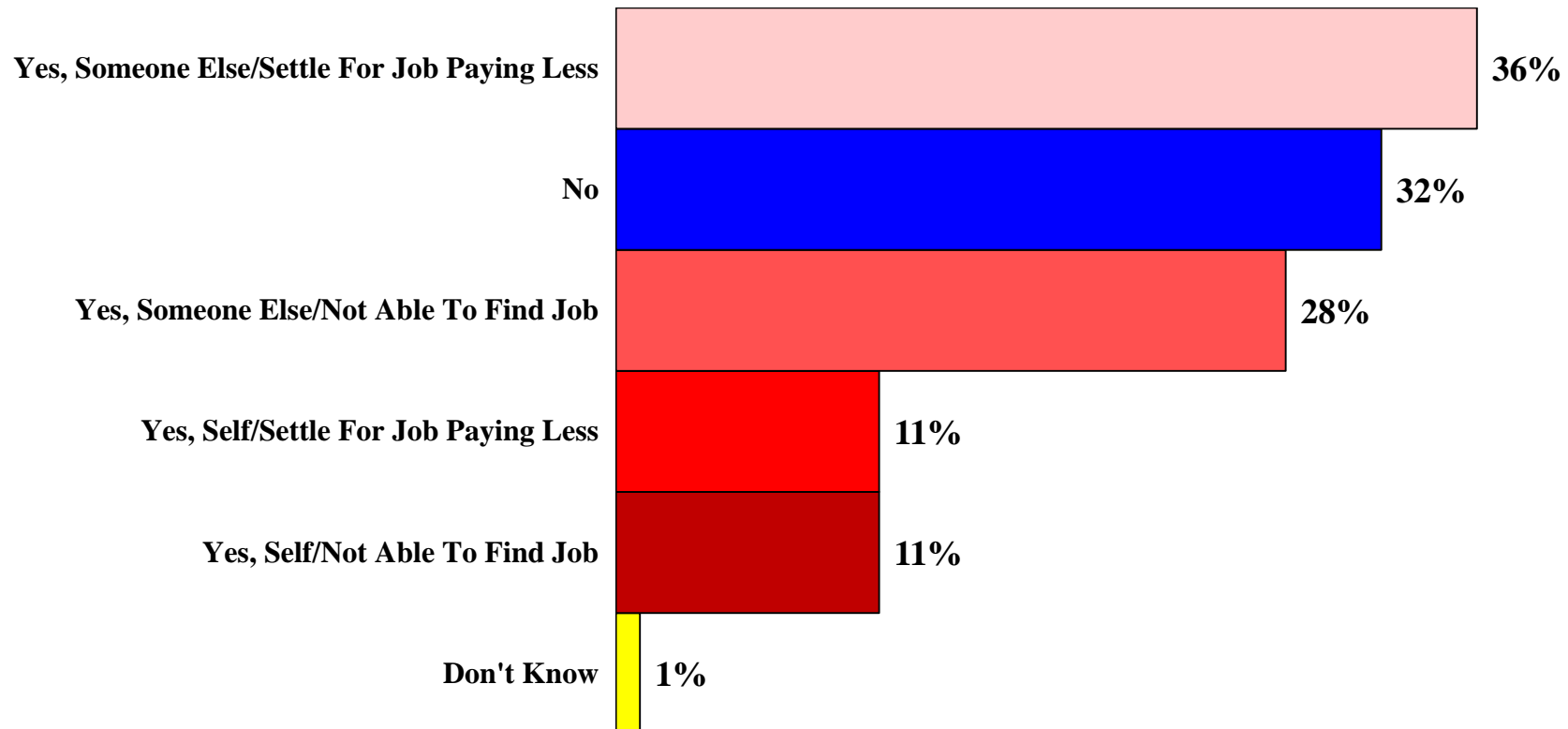


**Denotes Rounding*

A large majority of voters have either lost a job or had to settle for less themselves or know someone who has.

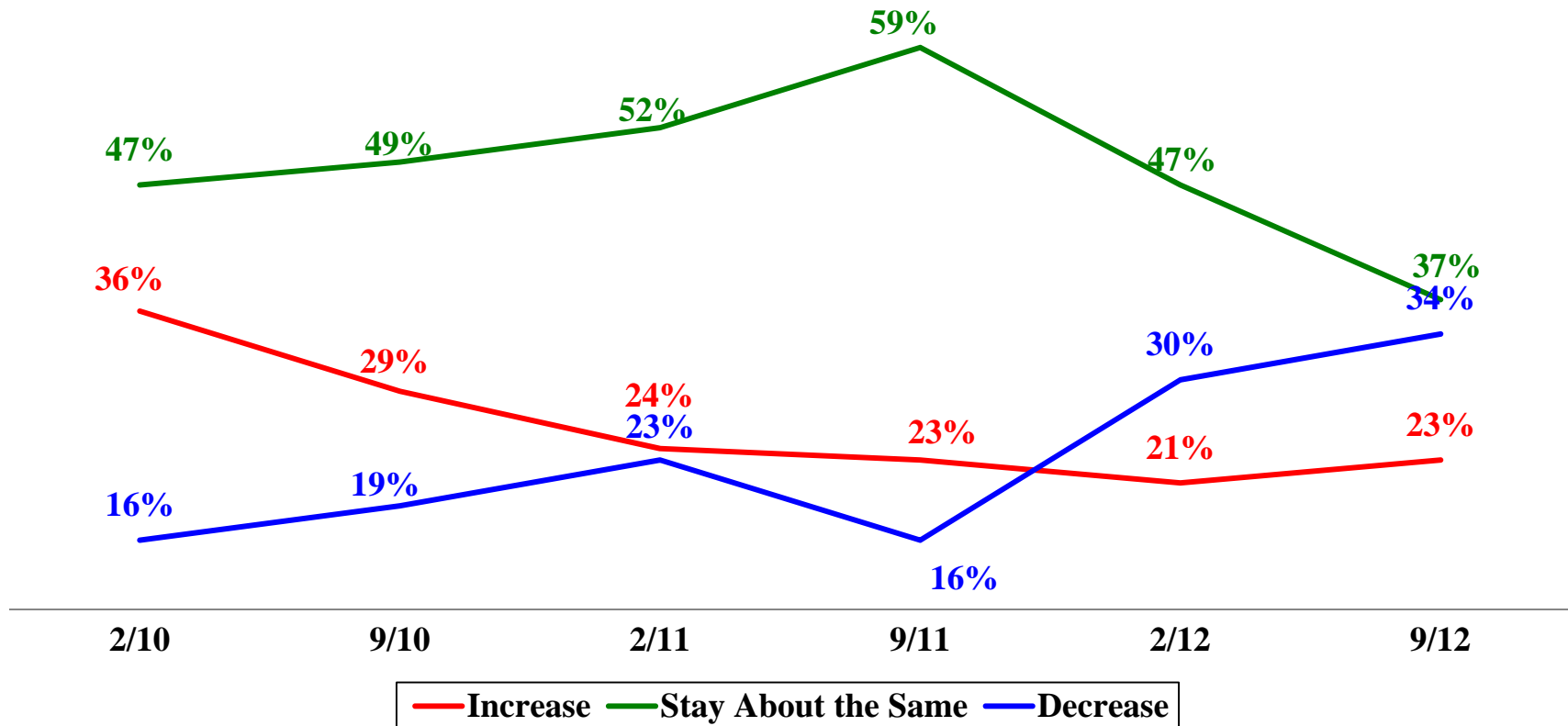
“Thinking now about yourself, have you or someone you know not been able to find a job or been forced to settle for a job paying significantly less than previously?”

Total Yes: 67%



One-third of Nevadans now believe the unemployment rate will decrease over the next year.

“And, as you may know, Nevada’s unemployment rate is nearly the highest it has been in decades. Over the next year, do you think Nevada’s unemployment will...”

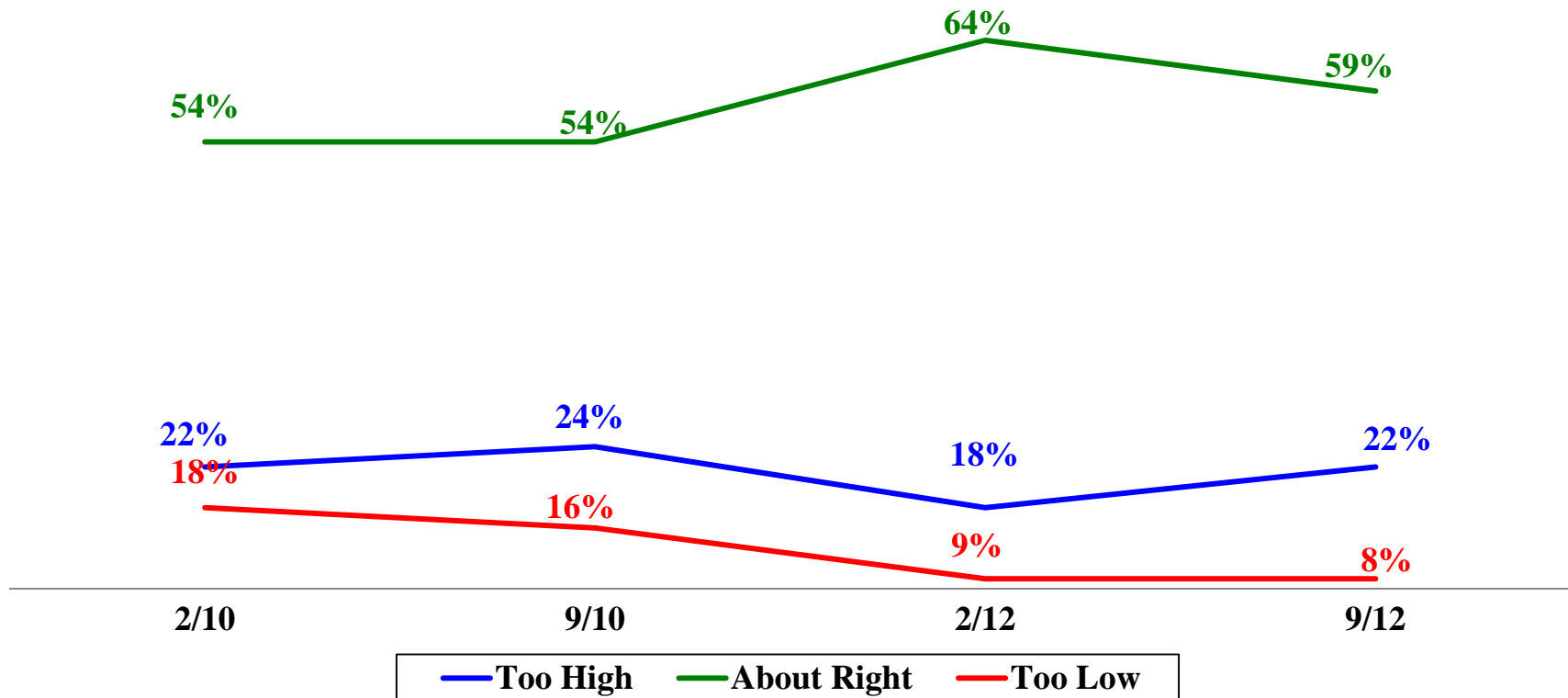




State Budget & Taxes

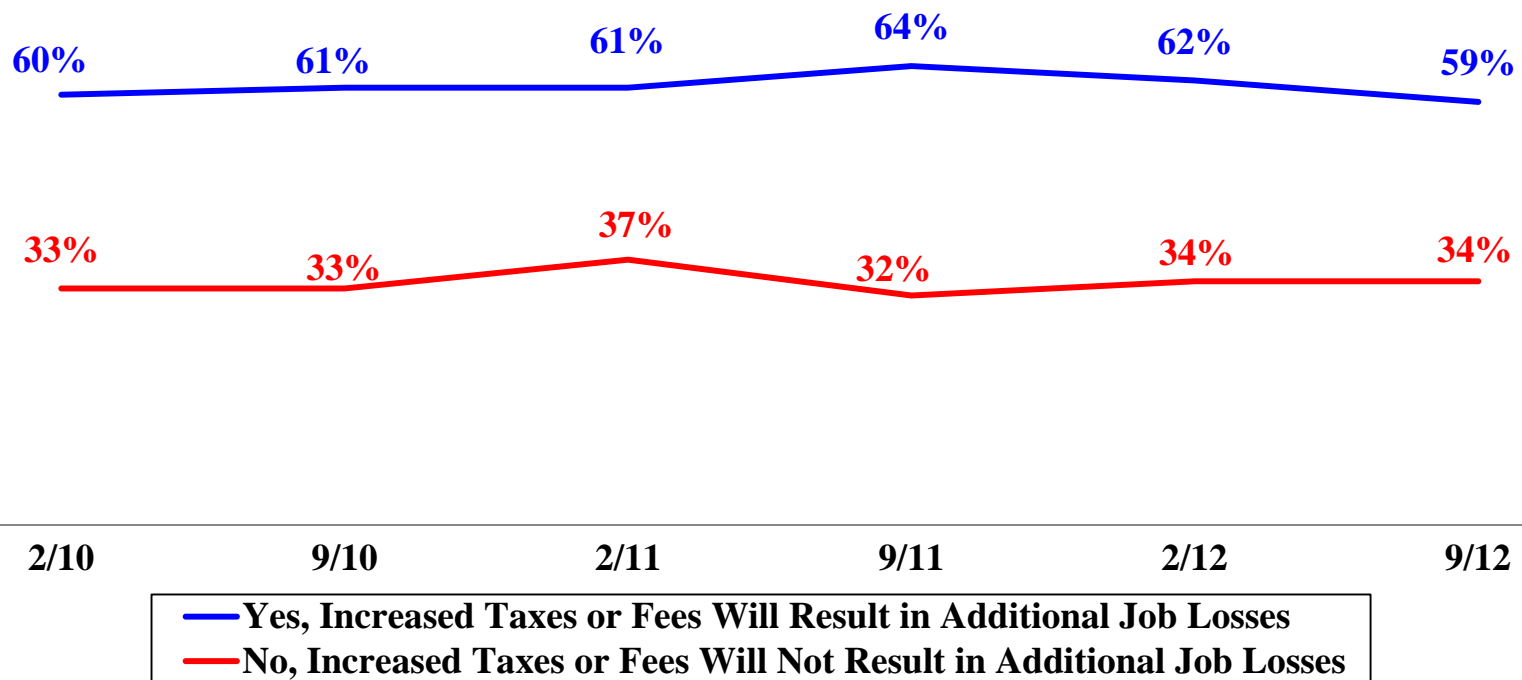
A majority of Nevadans say the amount of taxes they pay is about right.

“Thinking about the state taxes you pay, do you consider the overall amount of state taxes you pay to be...?”



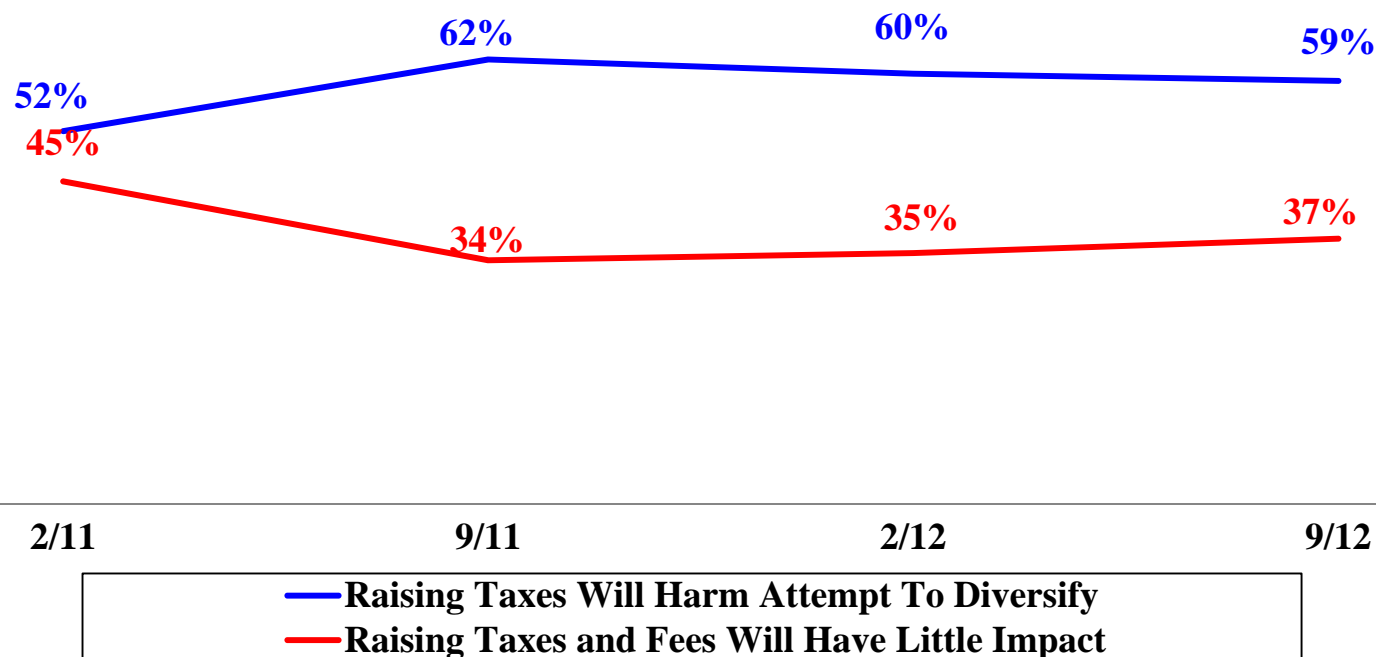
Nevadans continue to believe that increased taxes or fees will result in additional job losses.

“For a long time, Nevada led the nation in job creation and economic growth. However, since the recession began Nevada has lost thousands of jobs and now leads the nation in unemployment. Do you believe that increased taxes or fees on businesses will result in additional job losses?”



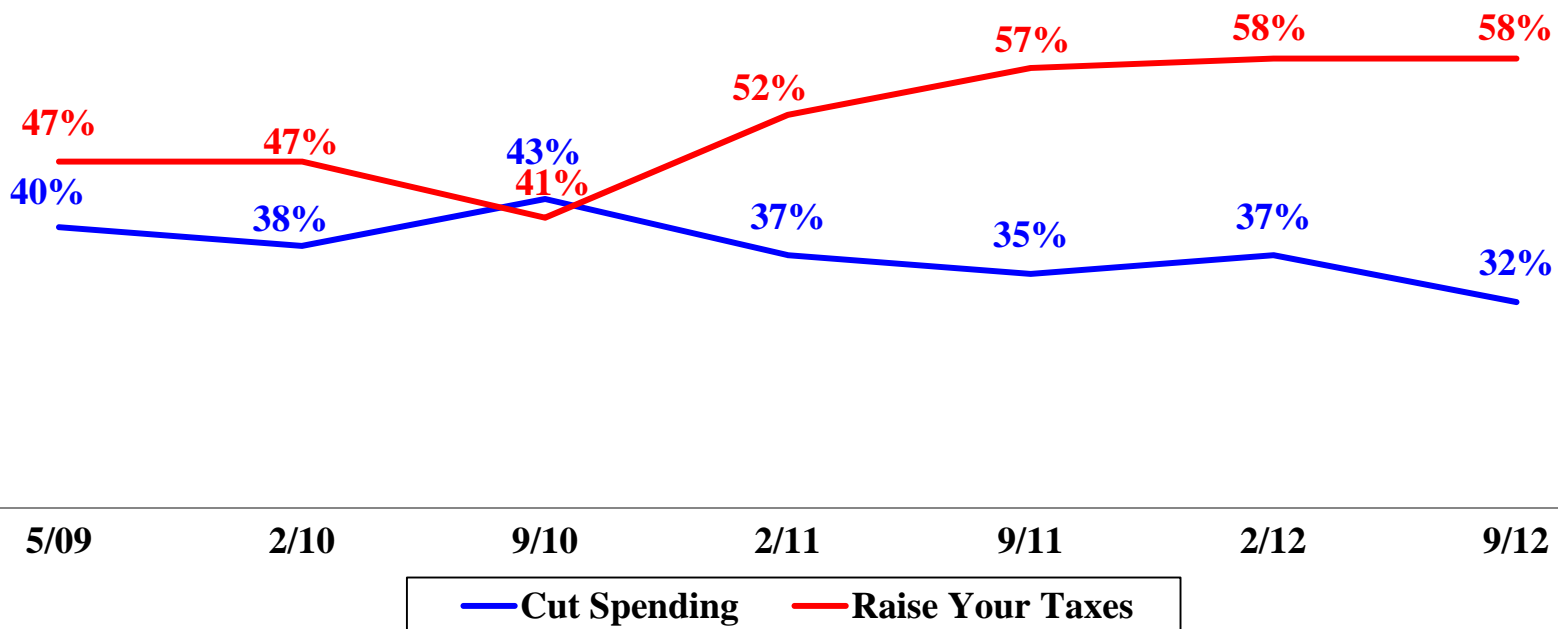
Voters agree that raising taxes will harm Nevada's attempt to diversify the economy and attract new businesses.

“And, do you think that raising new 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 industries?”



A strong majority of Nevada voters say they would rather raise taxes than cut spending in order to keep government services like education and health care.

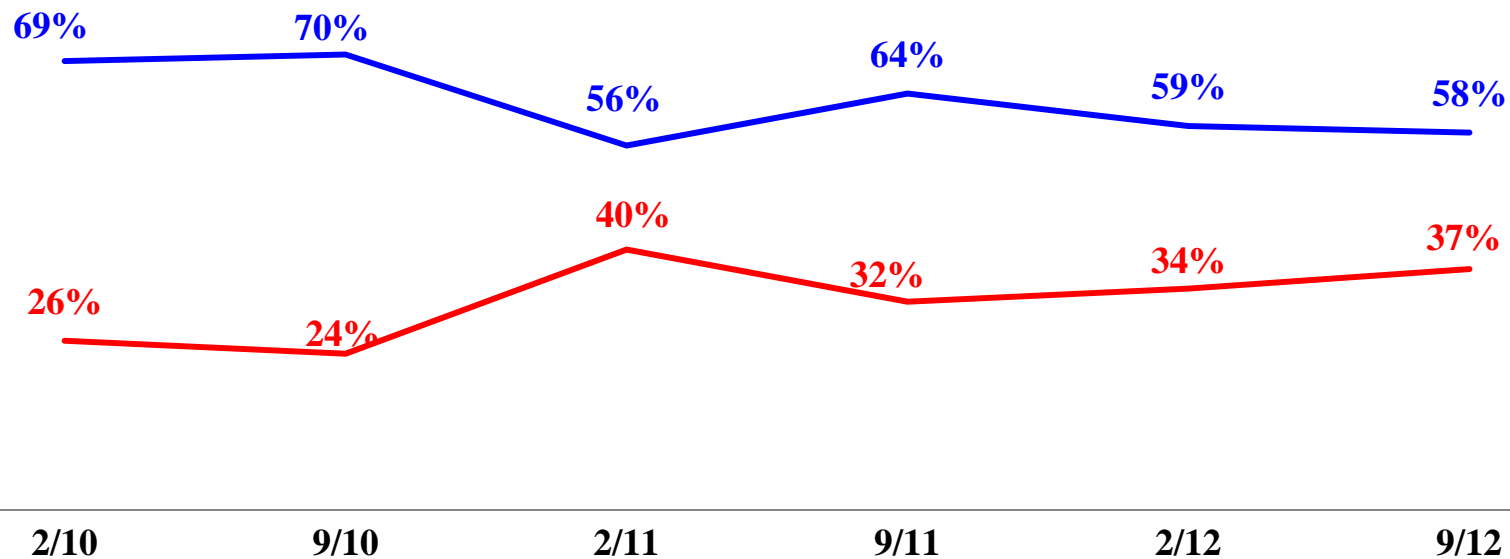
“As you may know, Nevada’s constitution requires that the state operate on a balanced budget. If state revenues fall, would you rather the Governor and State Legislature CUT SPENDING for government services such as education and health care, or RAISE YOUR TAXES to avoid these cuts?”



**Split Sample A, (N=255)

Voters continue to believe that spending cuts can be absorbed by trimming waste, fraud, and abuse.

“Do you believe that spending cuts in Nevada’s state budget can be absorbed by trimming waste, fraud and abuse in the state budget and through government reorganization, or do you believe that additional spending cuts will hurt important programs?”



— Additional Spending Cuts Can be Absorbed — Additional Spending Cuts Will Hurt Important Programs

Voters remain largely divided over the margin tax messages.

“There may be a proposal on the ballot in 2014 to impose an additional two percent tax, called a margin tax, on all non-gaming businesses whose net revenue exceed one million dollars. I am going to read you two statements about the proposal. After I read each statement, please tell me which one comes closest to your own opinion.”

2/12

9/12

47%

45%

Some people say that this general business tax will generate needed tax revenues to support education and this form of corporate income tax is necessary to improve our schools.

...while...

48%

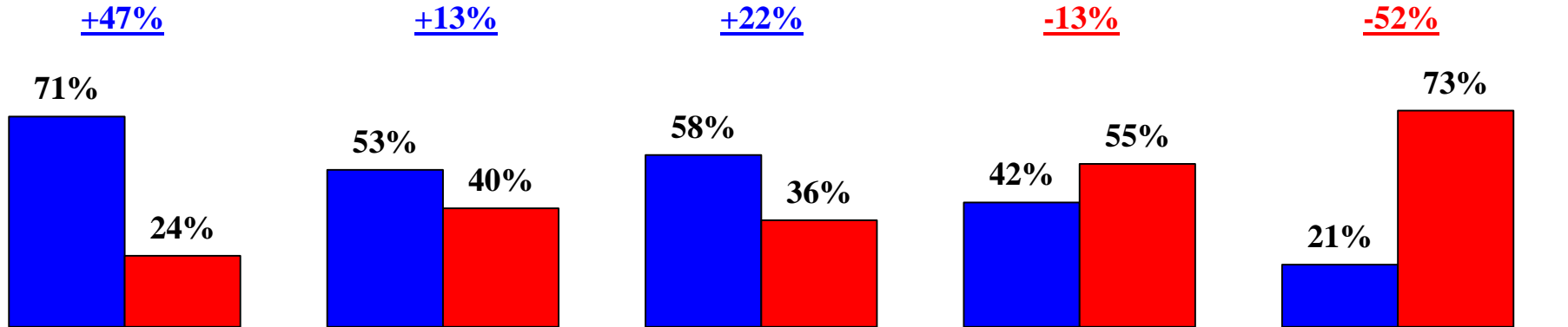
49%

Other people say that this type of general business tax will increase unemployment, cause already struggling businesses to fail since it applies even to businesses that are not profitable, and harm efforts to attract new businesses to Nevada.

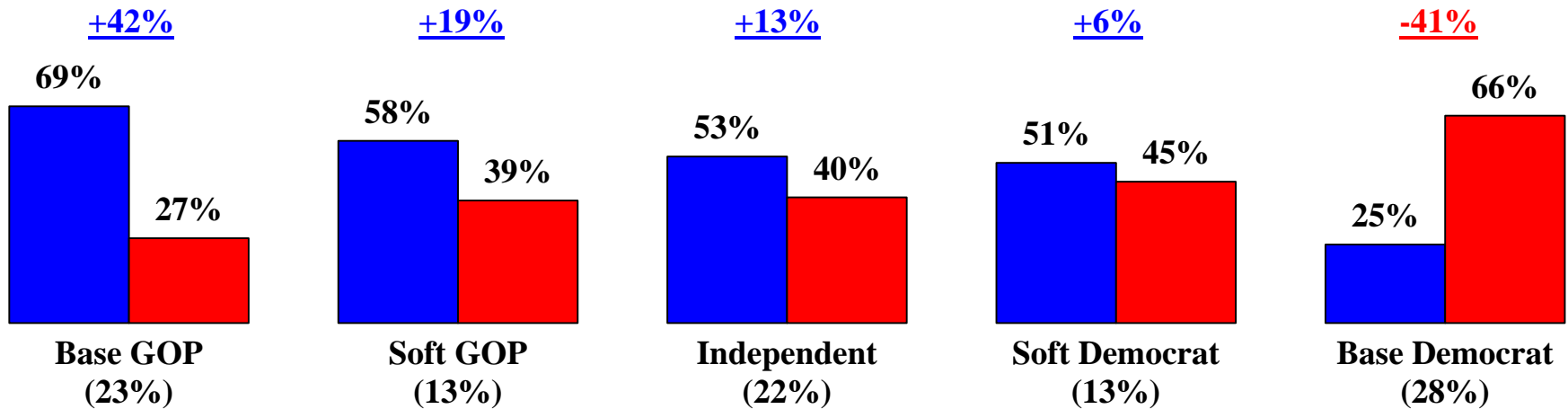
Independents continue to oppose the margin tax, while soft Democrats are also now against it.

Margin Tax by Party

2/12



9/12



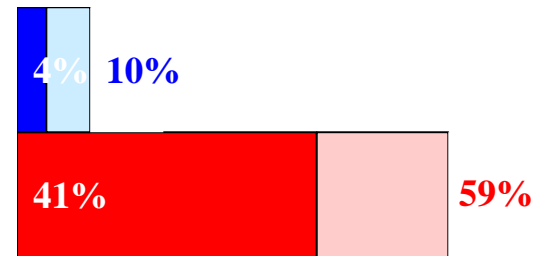
■ Will Raise Prices, Unemployment Rate & Hurt Business

■ Will Generate Necessary Revenues

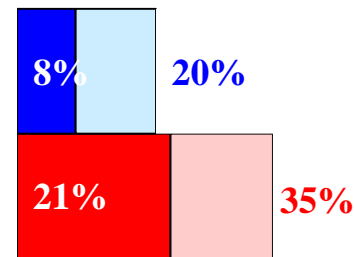
The hit on the margin tax about funds being used for non-education purposes resonates with voters.

“Now, I’d like to read you two statements about this proposal, and please tell me for each one if the statement makes you MORE likely or LESS likely to support the margin tax proposal, or if it makes no difference to your vote..”

Supporters of this proposal claim that the hundreds of millions of dollars in additional tax revenue will help our struggling education system, but the supporters admit that the funds raised can be used for non-education purposes and that not a single dollar of the new tax is required to be used to increase education funding.



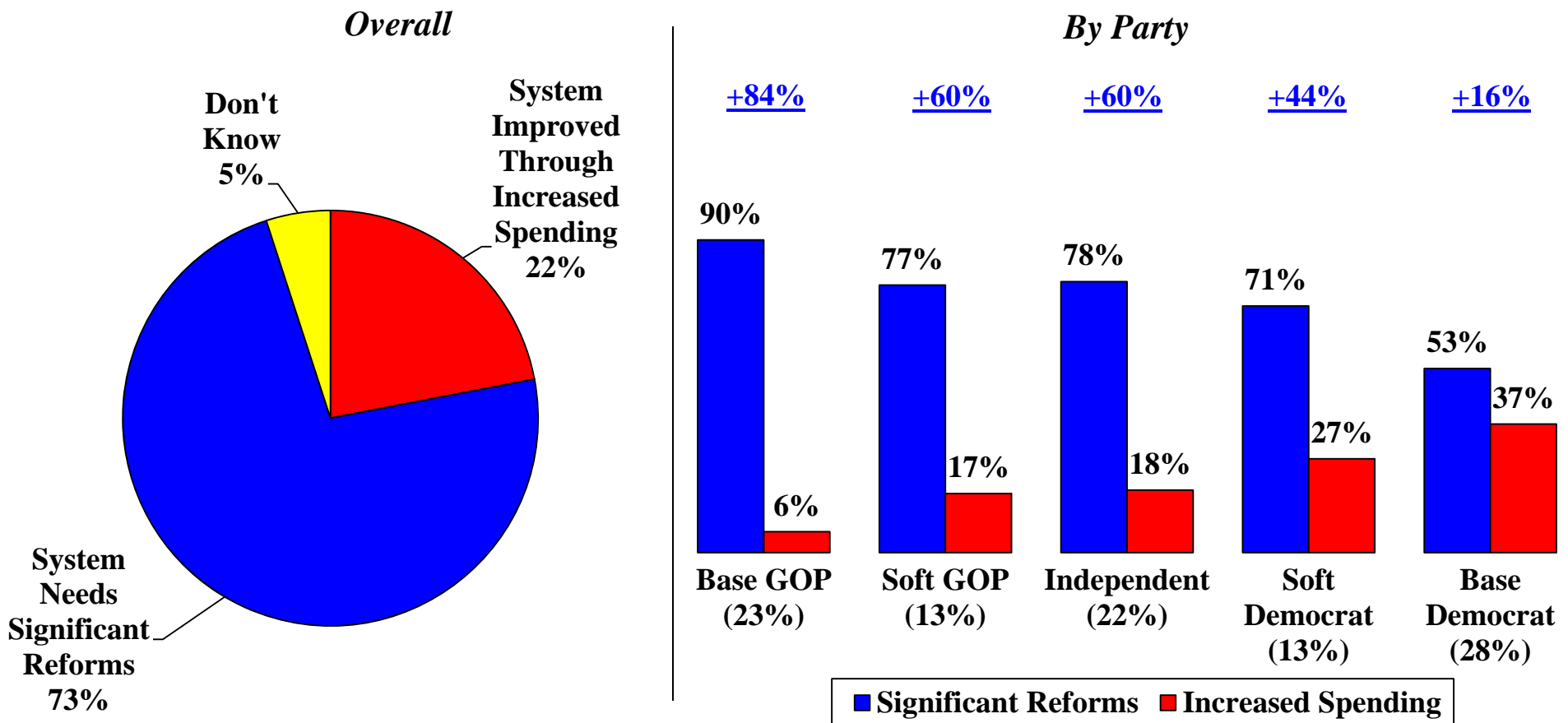
Opponents of this proposal note that although the tax does not apply to gaming revenues, it does apply to all non-gaming revenues earned by casinos, such as revenues from shops, restaurants, hotels, and shows. Therefore, opponents argue that this tax will harm the gaming industry and cause job losses just when gaming industry employment was finally starting to recover.



■ Much More Likely
 ■ Total More Likely
 ■ Much Less Likely
 ■ Total Less Likely

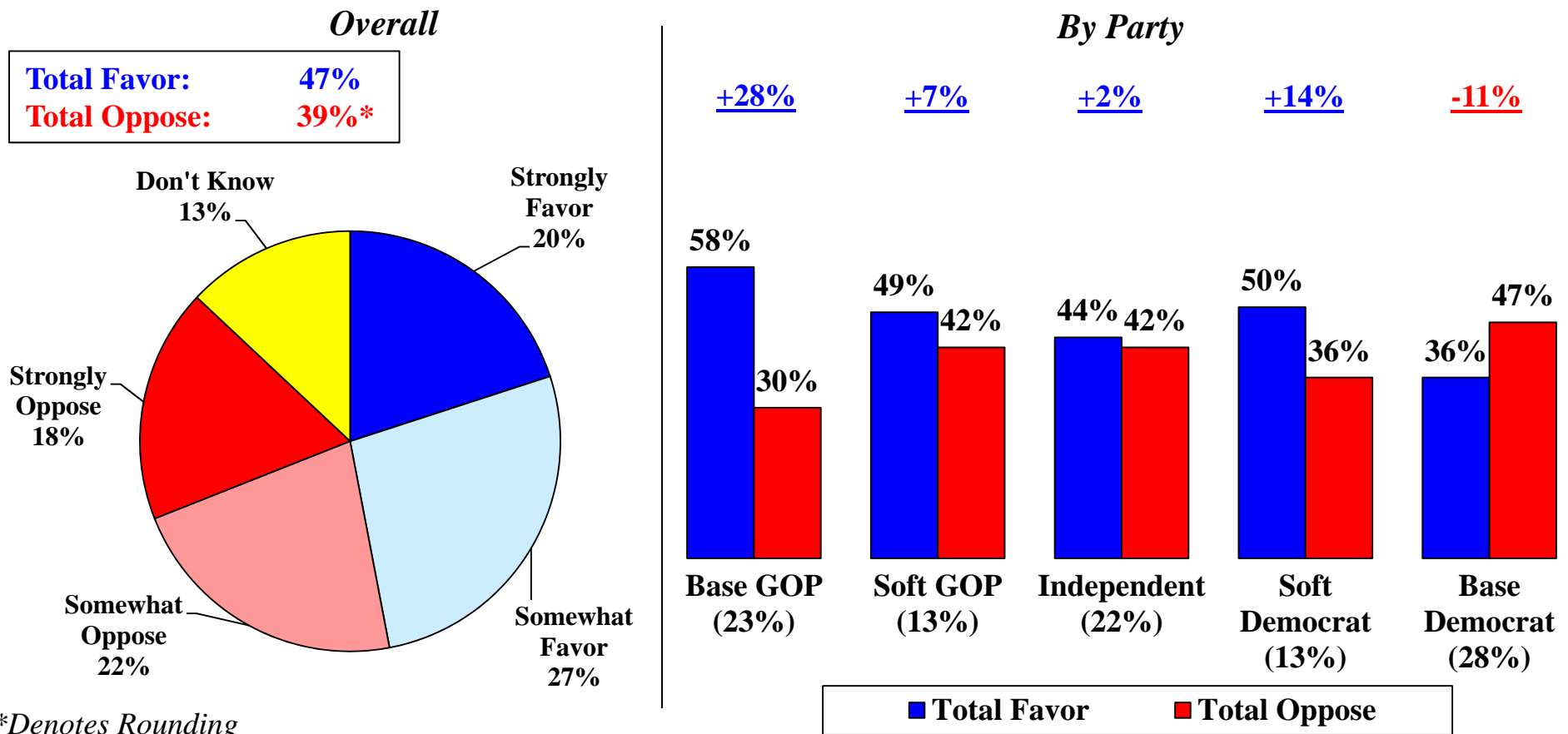
Nearly three-quarters of voters believe Nevada's education system needs significant reforms to be improved.

“Thinking now about education, Nevada’s education system has below average graduation rates and has below average scores on standardized tests. Do you think that the school system can be improved through increased spending or do you believe that the system also needs significant reforms in order to improve results?”



GOPers and soft Democrats are in favor of a proposal that would limit the State Legislature's ability to increase state spending.

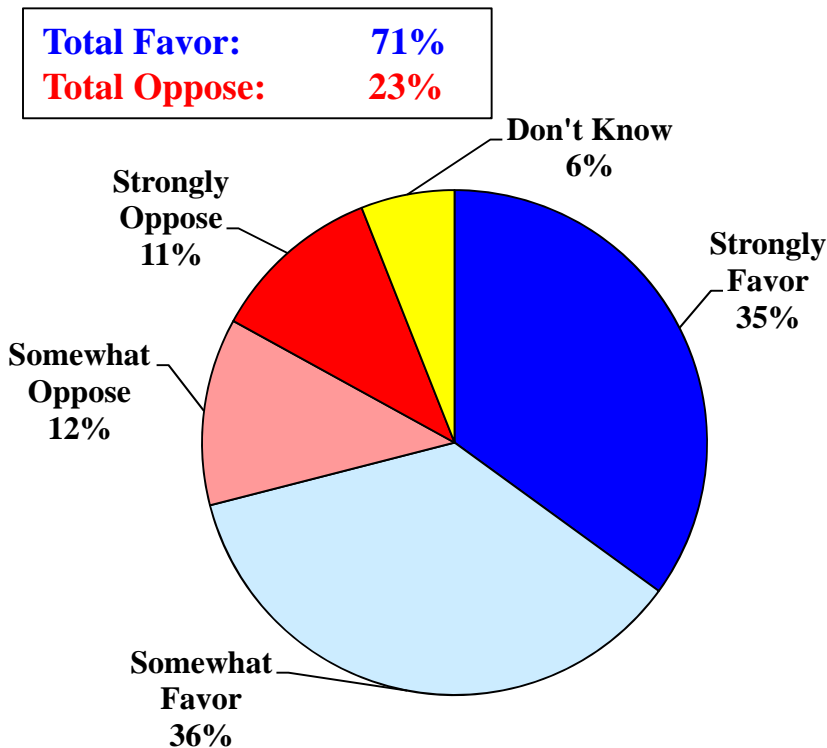
“Would you favor or oppose a proposal that would not allow the State Legislature to increase total state government spending by more than the percentage increase in population plus the percentage increase of inflation?”



The language that we tested last year on limiting spending is significantly different than this year's question.

9/11

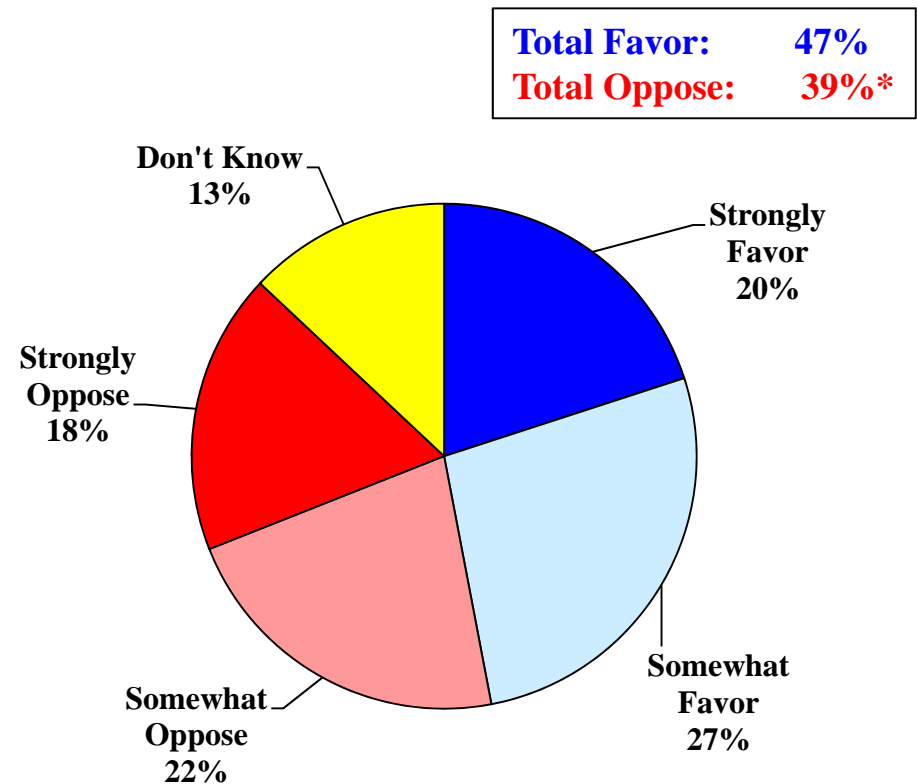
“Still thinking about the state budget, would you favor or oppose a proposal to limit the increase in state government spending annually to the same rate as economic growth?”



*Denotes Rounding

9/12

“Would you favor or oppose a proposal that would not allow the State Legislature to increase total state government spending by more than the percentage increase in population plus the percentage increase of inflation?”



Nevadans are divided over the effectiveness of the state's tax system.

“Thinking some more about Nevada’s tax system...”

	<u>5/09</u>	<u>2/10</u>	<u>9/10</u>	<u>2/11</u>	<u>9/11</u>	<u>2/12</u>
Works Well:	56%	48%	50%	46%	47%	50%
Needs to Change:	39%	43%	40%	48%	45%	46%

45%

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.

...while...

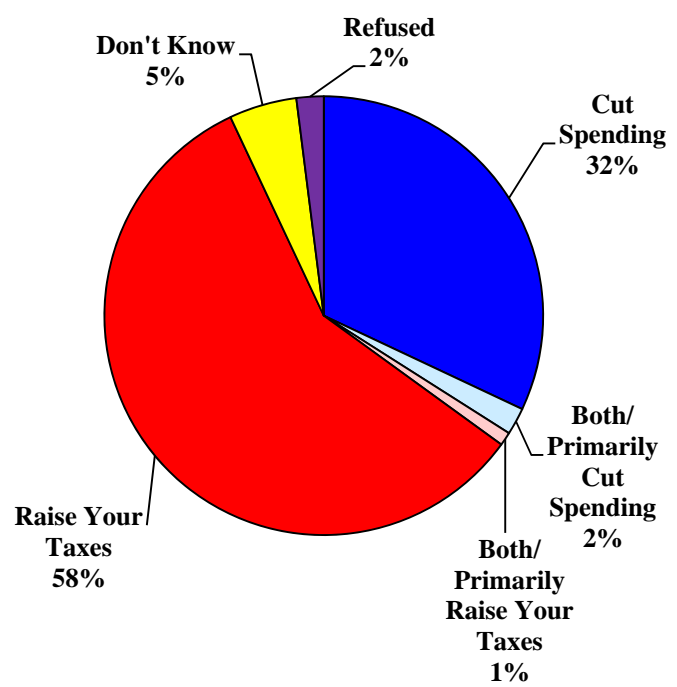
47%

Other people say that Nevada needs to significantly change its tax system to become less dependent on gaming and sales taxes and more stable because other businesses would pay more. 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.

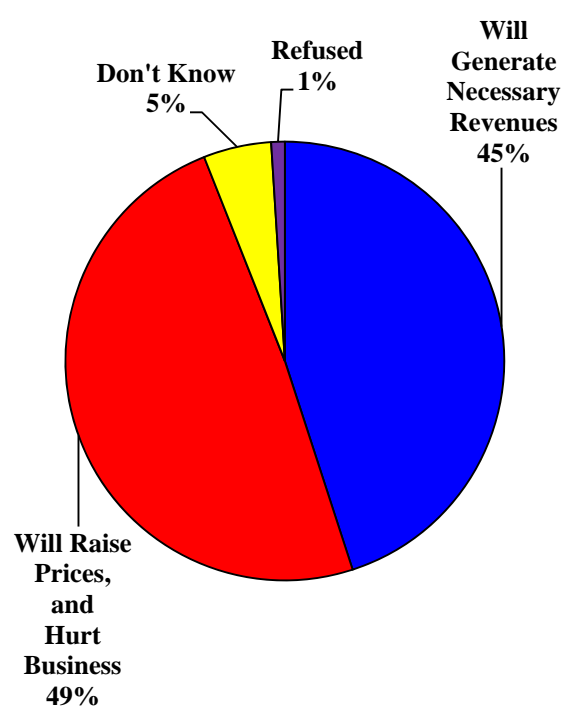
A majority of voters say taxes should be raised to balance the budget; they are divided over the margin tax and whether or not the state's tax system works well.

*CUT SPENDING or
RAISE YOUR TAXES*

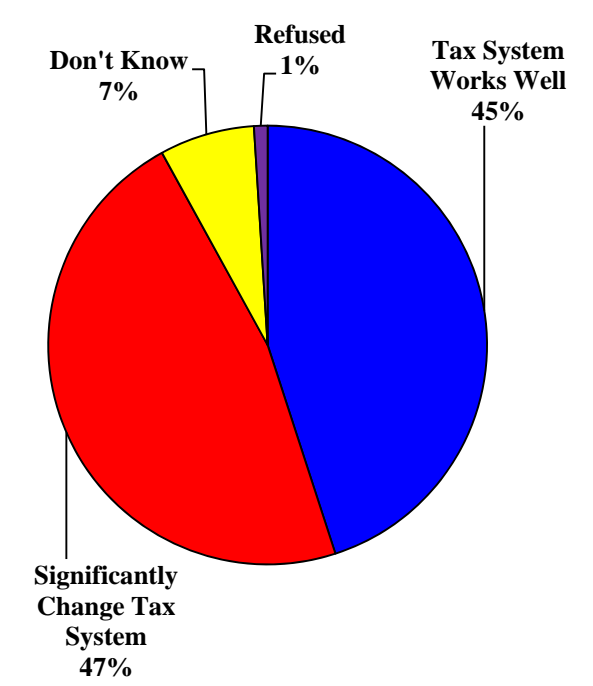
Total Cut:	34%
Total Raise Taxes:	59%



Margin Tax



*Nevada's tax system:
Gaming and Sales Tax*

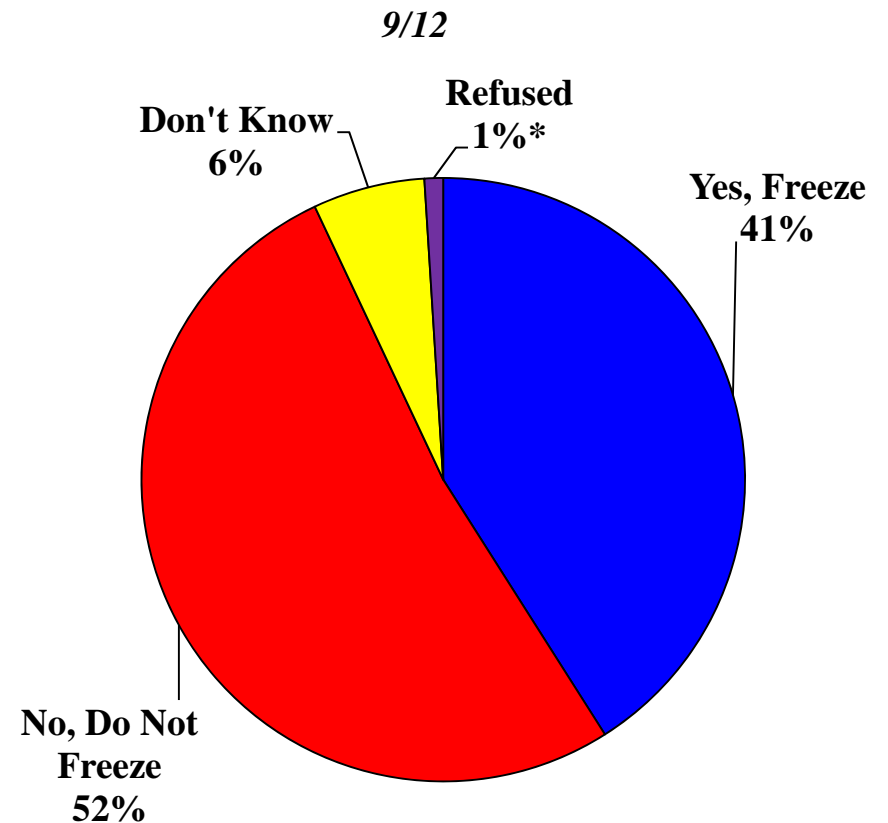
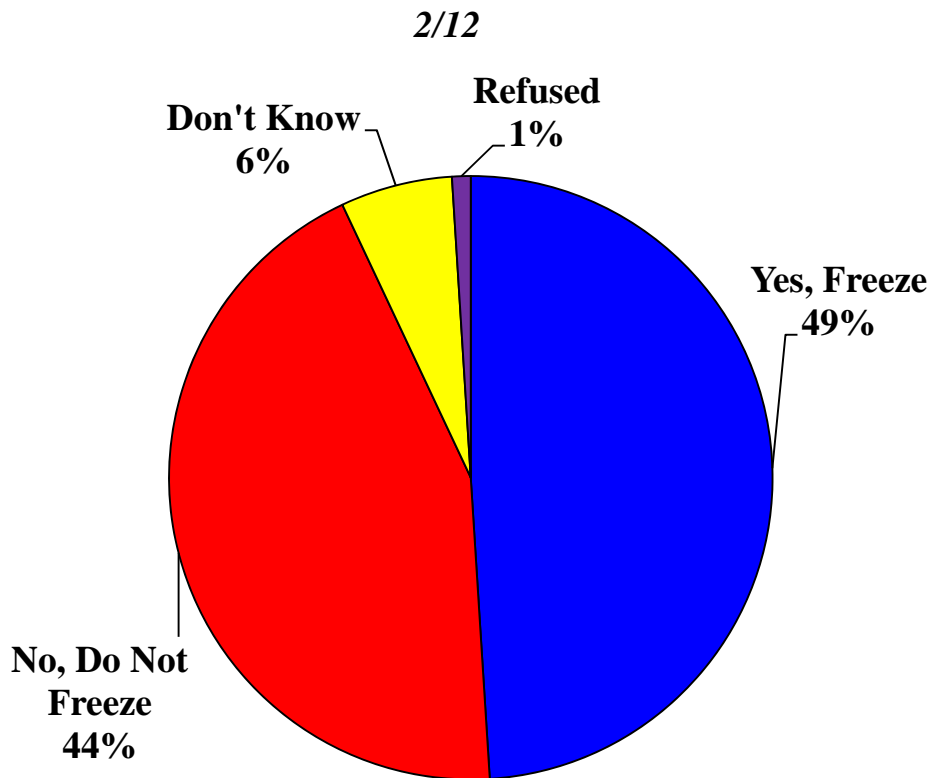




Public Employee Retirement System

A majority of Nevadans now say pensions should not be frozen in order to hold down expenses.

“Some private companies, including General Motors, have said that they will freeze the defined benefit pension plans of all salaried workers in an effort to hold down expenses. A number of state governments are also considering taking this step in order to control costs. Do you believe that Nevada should freeze the defined benefits provided through the Public Employees Retirement System?”

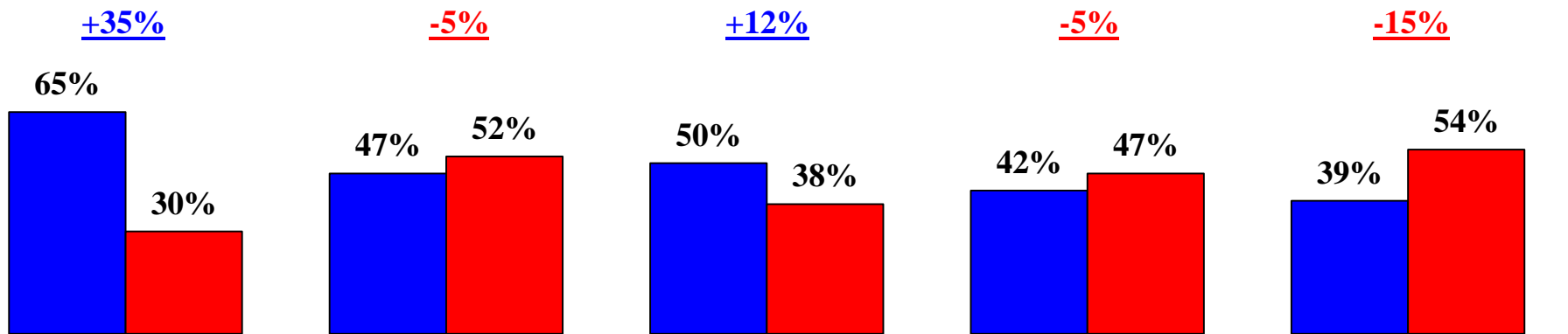


**Denotes Rounding*

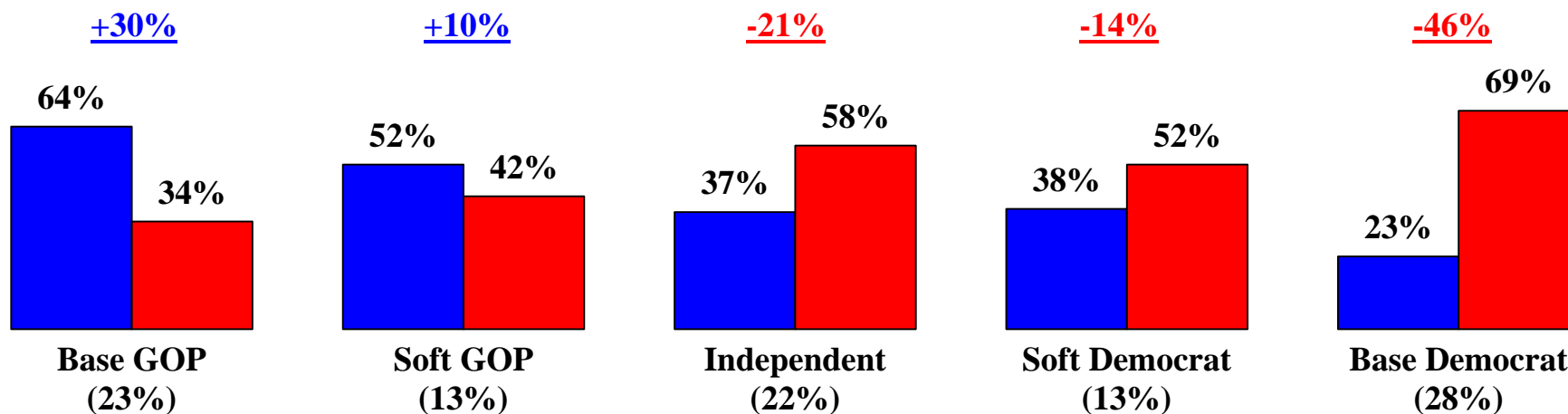
Independents have flipped on the pension issue.

By Party

2/12



9/12



■ Yes, Freeze ■ No, Do Not Freeze



Medicare & Medicaid

A majority of Nevadans agree with the message supporting the Republican Medicare plan.

“Thinking now about the House Republicans’ Medicare plan, I would like to read you two statements about what Democrats and Republicans are saying about the plan. After I read each statement, please tell me which one comes closest to your own opinion.”

51%

Republicans say this plan is a good idea because it leaves the current Medicare system exactly as-is for people 55 years old and older and protects the system for future generations. It stops Obamacare’s raid on the Medicare trust fund, increases funding for those who are poor and sick, and comes along with a bipartisan plan to fight Medicare waste and fraud. Without any changes, Medicare will be bankrupt in approximately ten years, requiring enormous tax increases or rationed care.

...while...

43%

Democrats say this plan is a bad idea because it would cut Medicare spending and replace Medicare with a voucher system. Democrats say that a voucher system will force seniors to renegotiate with insurance companies, which are free to raise rates and deny coverage. Medicare’s guaranteed coverage would end, and seniors would have to pay more and more out of pocket.

By a slim margin, voters say the state should opt in to expanded Medicaid coverage.

“Thinking now about Medicaid, do you think that Nevada should...”

48%

Opt in to expanded Medicaid coverage because expanding eligibility will provide more coverage to poor people, increase jobs in the health care industry, and cost the state very little because the federal government will pay nearly all of the program’s costs for at least the first few years.

...or...

44%

Opt out of the expanded Medicaid coverage because the state cannot afford to pay its added share of the program’s costs and the system already covers the neediest children and elderly.

**For more information about this presentation or about
Public Opinion Strategies, please give us a call.**

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Turning Questions Into Answers

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