

MEMORANDUM

TO: Interested Parties
FROM: Hart Research Associates
DATE: September 19, 2016
RE: Key Findings from Statewide Survey

From September 12 to 16, 2016, Hart Research Associates conducted a survey among 802 likely November 2016 voters in New Jersey focused on the Casino Expansion Amendment. The survey has a margin of error of ± 3.5 percentage points. This memorandum highlights the key findings from the survey.

1) Voters have a very negative outlook on the direction of the state and have extremely low confidence that the revenue promised in the Casino Expansion Amendment will be delivered as it is promised. Just 19% of New Jersey voters believe that the state is headed in the right direction. And an even lower proportion (10%) have a high level of confidence that the state will deliver upon the promised revenue as stated in the ballot measure. This extremely low level of confidence has a direct impact on support for the ballot measure. Among those who have at least some confidence in the state to deliver on the revenue that is promised, 71% favor the Casino Expansion Amendment, while 16% oppose it. However, among those with very little confidence, the measure is losing by 60% to 25%; and for those with no confidence, the deficit is even greater – 80% oppose, 12% favor.

When asked to explain why they have low or no confidence in the revenue being delivered as promised in the Amendment, 50% say it is because politicians will use the funds for their own priorities, while 16% say it is because casino companies will over-promise on revenue. Another 30% do volunteer that both of these are concerns for them.

2) Support for the Casino Expansion Amendment has dropped since June, and now voters are more likely to oppose than favor the measure. Overall, 50% of New Jerseyans now oppose the measure while 37% favor it. This is a reversal from June, when 50% favored the measure and 43% opposed it. Since June, there has been a greater decline in support in north and central Jersey – which were both geographies that formed a core constituency of support in the past.

3) Messaging in support of the measure is effective, and in a less hostile environment could help make the case to move voters to support the Amendment. Voters do respond favorably to both proof points that attempt to bolster confidence in the ballot measure and positive messaging in support of

the measure. In particular, voters are more likely to gain confidence in the proposal when:

- ✓ They learn that revenue generated by the proposal would be constitutionally required to be delivered to specific sources;
- ✓ No tax dollars would be used for either project and taxpayers would not be on the hook for the projects and;
- ✓ No public money would be used for the projects.

The most effective messages in support of the project highlight the positive impact on seniors, the economy, and giving voters control rather than politicians in Trenton. But when it comes to both confidence and being a strong reason to support the project, the best arguments receive ratings somewhere in the 40 percent range in terms of strength of the statement. These are OK numbers in a normal context, but the opponents' messages are MUCH more impactful.

4) Respondents react very strongly to reasons to oppose the Amendment, which play to the lack of specifics and distrust directed at state government in Trenton. For comparison, the highest testing positive message is viewed as a very strong reason to support the measure by 48% of voters. The four negative messages tested in the survey all receive anywhere between 56% to 60% of voters who say that each one is a very strong reason to oppose the measure. These messages are more effective because they play to the fears and pre-existing feelings that voters have toward government in New Jersey. In essence, their messaging is so strong because it is like throwing gasoline on the existing fire of anger and distrust directed at Trenton.

Initially, the Amendment trails by 13 points (37% favor, 50% oppose). Even after voters hear BOTH the factual proof points intended to provide them with more confidence AND the positive messaging, the ballot measure is still losing by 9 points (41% favor, 50% oppose). And this is BEFORE respondents hear the opponents' case. After hearing the reasons to oppose – and worth noting that respondents only heard 2 negative messages while they heard 7 positive messages – the measure is losing by 20 points – 36% favor, 56% oppose.

The bottom line is that in the current environment, where voters have a great deal of distrust and lack of confidence in state government, this measure is very unlikely to pass. In order for the measure to have a fair fight and have a real chance to pass, voters must receive concrete details about what a YES vote means so they know what they are getting will be fundamentally different from the broken promises of the past.