



5 JANUARY 2015

State Voters Greet 2015 in Upbeat Mood

Washington voters are in an upbeat mood heading into 2015. At least 60% of voters interviewed for the recent *Elway Poll* said they expected things to get better over the next year for the country, the state, their community and their household, pushing the Voter Outlook Index to its third-highest mark in 10 years.

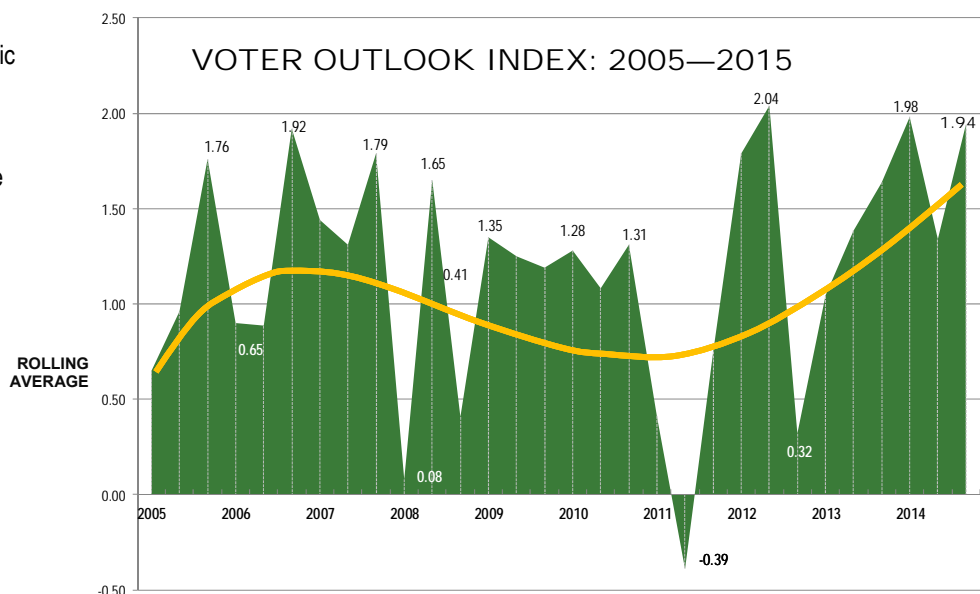
The Voter Outlook Index measures voters' general outlook. Unlike a consumer confidence index, it is intentionally broad and not focused specifically on individual finances. It asks voters how they expect "things will go" over "the next year or so" on a 4-point scale of "much better" to "much worse" for: 1) the country, 2) the state, 3) their community, and 4) their household. The combined Index has a range of +8 to -8. The 10-year average score is 1.18. The Index score this month was 1.94.

A dip last summer interrupted an otherwise steady climb in the Index throughout 2013-14. All four measures dropped in July and rebounded in December.

- The largest increase was the belief that things are getting better for the country: 60% thought things would get better for the country, up from 45% six months ago—a 26% swing in the positive direction. That 60% is the highest proportion since April of 2012.
- Household expectations, always the highest of the four, were their highest since 2007, with 70% expecting things to get better this year.
- State expectations (64% "better") were at their highest point since 2000, although expectations were nearly as high from mid-2013 to early 2014 (62-63%).
- Community expectations have stayed relatively steady and positive over the past two years, with between 63% and 73% expecting things to improve each time. This month's figure (68%) is right in the middle of that range.

As is typically the case, King County voters were the most likely to be optimistic with an Index score of 2.61 compared to 1.83 in Pierce/Kitsap counties; 1.92 in the North Puget Sound region; 1.37 on the Olympic Peninsula and Southwest; and 1.53 east of the Cascades.

Smoothing out the periodic fluctuations, the rolling average indicates a general increase from 2005 to 2007, a decrease to 2011, the period of the Great Recession, then generally rising optimism since the beginning of 2012.



Sample Profile

502 registered voters, selected at random from registered voter lists in Washington state, were interviewed December 27-29, 2014 by live, professional interviewers. 19% were conducted on cell phones. The margin of sampling error is ±4.5% at the 95% level of confidence. This means, in theory, had this same survey been conducted 100 times, the results would be within ±4.5% of the results reported here at least 95 times.

REGION

King County	32%
Pierce + Kitsap.....	21%
North Sound (Snohomish to Whatcom)	15%
Western Washington (Clallam to Clark)	16%
Eastern Washington	18%

GENDER

Male	48%
Female	52%

AGE

18-35.....	7%
36-50.....	23%
51-64.....	42%
65+	26%

PARTY IDENTIFICATION

Democrat	32%
Republican	20%
Independent.....	47%

EDUCATION

High School	17%
Some College	24%
College Graduate.....	39%
Post Graduate.....	20%

HOUSEHOLD INCOME

<\$50,000	22%
\$50 - 74,000	23%
\$75 - 99,000	20%
\$100,000+	19%
No Answer.....	17%

The Elway Poll

The Elway Poll is an independent, non-partisan analysis of public opinion in Washington and the Northwest.

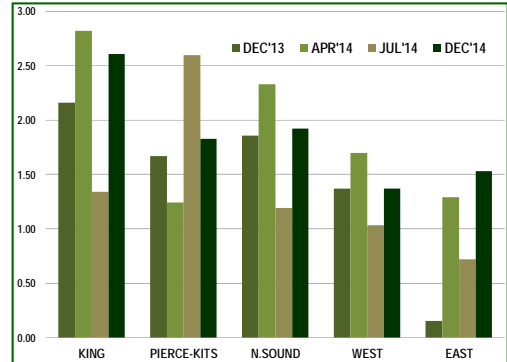
PROPRIETARY QUESTIONS: Each quarter, space is reserved in the questionnaire to allow for proprietary questions. The fee for proprietary questions is \$1000 per question. You will receive the results of your question(s) with full crosstabulations within three days after the interviews are completed.

CROSTABS: A full set of cross-tabulation tables is available for \$100.

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The graph below indicates Voter Outlook Index scores by region over the last year. Puget Sound residents have been more optimistic than residents of the coastal and Eastern Washington counties. King County residents have been consistently the most optimistic in the state, except for a spike last July in Pierce/Kitsap.

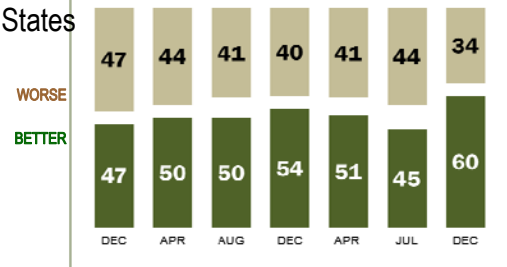
VOTER OUTLOOK INDEX BY REGION
 DEC 2013-
 DEC 2014



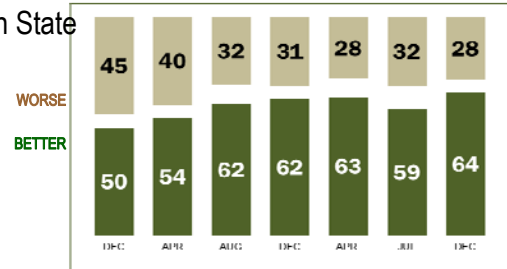
VOTER OUTLOOK INDEX ITEMS: LAST TWO YEARS

In the next year, will things get better or worse. in:

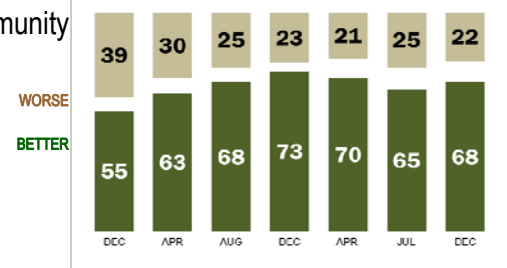
The United States



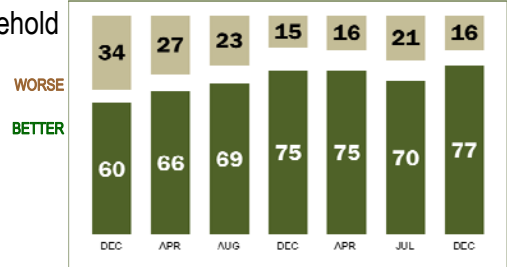
Washington State

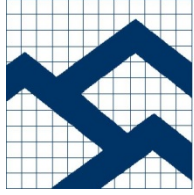


Your Community



Your Household





The Elway Poll

PROPRIETARY SUBSCRIPTIONS

The Elway Poll offers a limited number of organizations the ability to monitor public opinion on issues vital to your operation effectively and economically.

PROPRIETARY QUESTIONS: IN-HOUSE SURVEY CAPACITY

For an annual fee, Proprietary Subscribers are able to add their own private questions to our quarterly survey. Your data will be yours to use as you see fit. Your data are not published and subscribers are not disclosed. Use your questions for internal strategic purposes or release them as your own survey to internal or external audiences. You could even use them to create your own branded, on-going publicity generator.

QUARTERLY SURVEY

The on-going survey affords you the opportunity to track changes over time, ask follow up questions, and build a deeper understanding of public opinion on issues important to you. You can vary the number of questions from quarter to quarter: ask them at once, ask a few questions per quarter, or any combination you choose.

500 WASHINGTON VOTERS

Our sample of 500 Washington voter households has a margin of sampling error of $\pm 4.5\%$ and the ability to segment the sample by region, demographic variables.

ANNUAL FEE = SUBSTANTIAL SAVINGS

The annual fee is \$12,000 for 16 proprietary questions. Demographic questions and crosstabs are included in the annual fee, as is help with question design. You are not limited to 16 questions. You can ask additional questions at a pro-rated cost.

This plan offers on-going survey capacity for less than the cost of a single survey. By way of comparison, a single proprietary question in *The Elway Poll* costs \$1000. A single survey of 16 questions, plus demographics, could cost \$14-15,000. A quarterly survey of four questions each, plus demographics, could easily cost in the neighborhood of \$30,000.

Stretch your research dollar by becoming a Proprietary Subscriber to *The Elway Poll*. It could be the best investment you make this year.