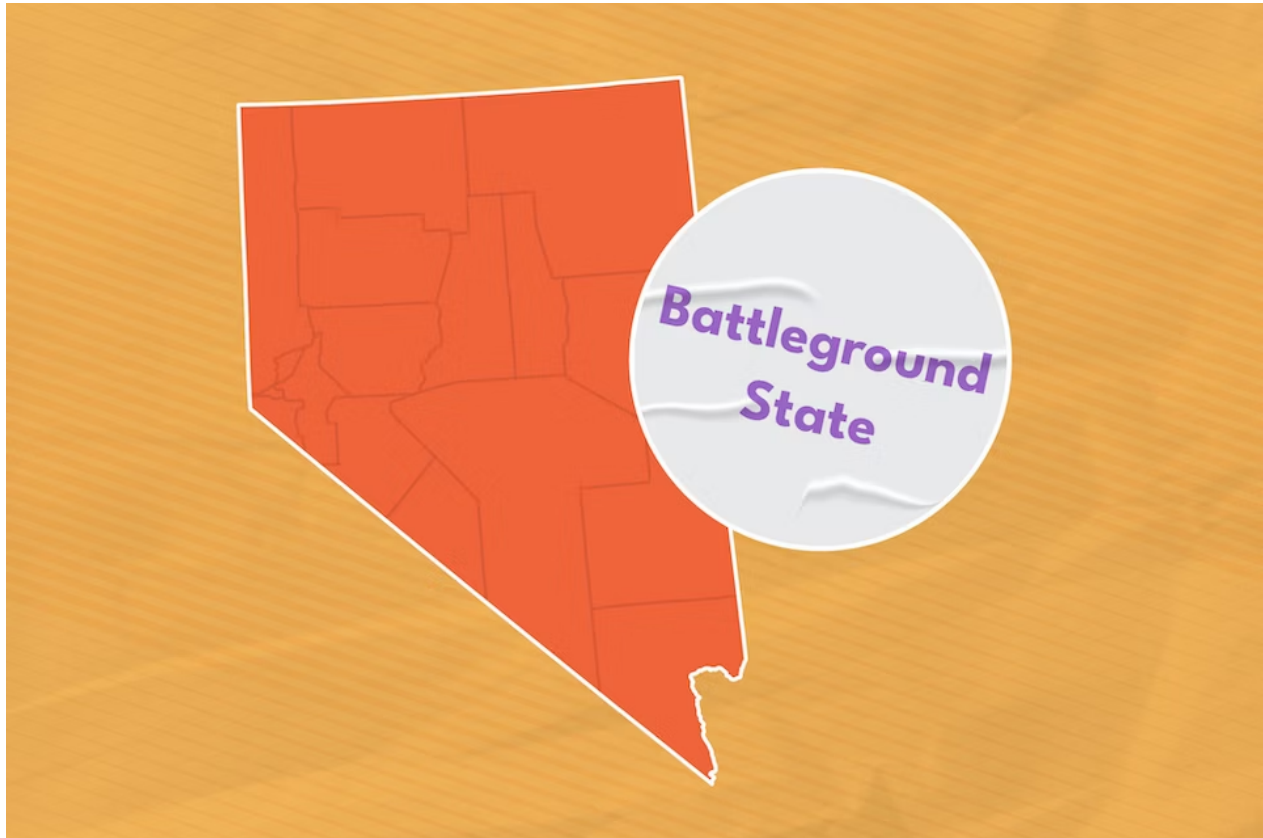


2024 Battleground State Preview: Nevada

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Nevada is once again at the center of attention in 2024—with six vital Electoral College votes, a Senate incumbent running for re-election, and numerous close House races. The state has been a critical battleground in five of the last eight presidential elections, and Nevada has the highest concentration of non-college voters of all the 2024 battleground states. When you throw in the somewhat lagging perception of economic recovery post-pandemic, it makes the challenges even greater for any incumbents vying to win the state.

Below, we examine the electoral and economic trends that Nevada has seen over the last decade of which campaigns should be readily aware heading into the 2024 election.

Nevada: The Tossup State

Nevada has remained one of the most consistent tossups in the country over recent election cycles. Here are three numbers to know:

4.4: Democrats won the state in every presidential race since 2008, but Nevada swung 4.4 percentage points to the right from 2012 to 2020.¹ Biden won by only 33,000 votes.

3-to-1: In 2020, Biden (+ allies) outspent Trump (+ allies) 3-to-1 in ads—Democrats' \$27 million to the GOP's \$8 million. Yet, Trump ended up doing even better in 2020 than he had in 2016 in the state.

14,000: In 2022, Republican Joe Lombardo was the *only* gubernatorial candidate to defeat an incumbent governor. He won by 1.5 percentage points (14,000 votes) even as Democratic Senator Catherine Cortez Masto won re-election by 0.8 percentage points (9,000 votes).

Republican Governor Joe Lombardo “is building a formidable political machine. Republicans have made inroads with working-class white voters here, leaving Democrats with an ever-diminishing margin of error.”² — Jon Ralston, founder and CEO of *The Nevada Independent*

Nevada: The Non-College Economy

Nevada has the highest concentration of non-college voters of all the battleground states. Understanding who they are is critical to winning the state.

- **Only 1/4 of adults over 25 have a college degree.** While the share of college grads is growing, it's going up slower in Nevada than in the rest of the country. ³
- **Nearly 9-in-10 Hispanic adults don't have a college degree.** ⁴ Overall, a quarter of people over the age of 25 in Nevada identify as Hispanic. ⁵ According to data firm Catalist, Nevada's Hispanic voters without a college degree swung 10 points towards Republicans between 2016 and 2020, compared to a smaller 5-point swing for college-educated Hispanics. ⁶
- **Over a fifth of workers are employed in a service sector job.** ⁷ Although many lower-wage service workers across the country have seen huge bumps in their earnings, wage growth in Nevada is one of the lowest in the country, coming in at just 1.3% over the past year. ⁸
- **Non-college workers are the most worried about high costs.** Two-thirds of non-college adults said they were very concerned about prices rising in the next two months. ⁹
- **Nevada has the highest unemployment rate in the nation, disproportionately impacting non-college workers.** The state's unemployment rate remains stubbornly elevated at 5.4% compared to 3.7% nationally. ¹⁰ In 2022, while 5.7% of workers without a four-year degree were unemployed, just 2.7% of college-educated workers were without employment. ¹¹
- **International travel to Las Vegas is down 40% since 2019, and employment in the accommodations sectors is just 88% of what it was pre-pandemic.** ¹² However, construction employment is over 115% of pre-pandemic levels, and the state is seeing a surge in its manufacturing and professional services sectors. ¹³

- **Union membership is on the decline.** Just 11.3% of employed workers are part of a union in Nevada, down from 14.6% in 2019.¹⁴ Biden won union households 57% to 42% over Trump—a margin that Senator Catherine Cortez Masto maintained in 2022 but that Governor Steve Sisolak fell just a few points short of in his losing gubernatorial race.

In 2024, it is likely we will see an electorate that looks very much like it did in 2020—when non-college voters made up 70% of the Nevada electorate. For Biden to carry the state, he will need to at least match his 2020 performance—when he won 49% of non-college voters in the state.¹⁵

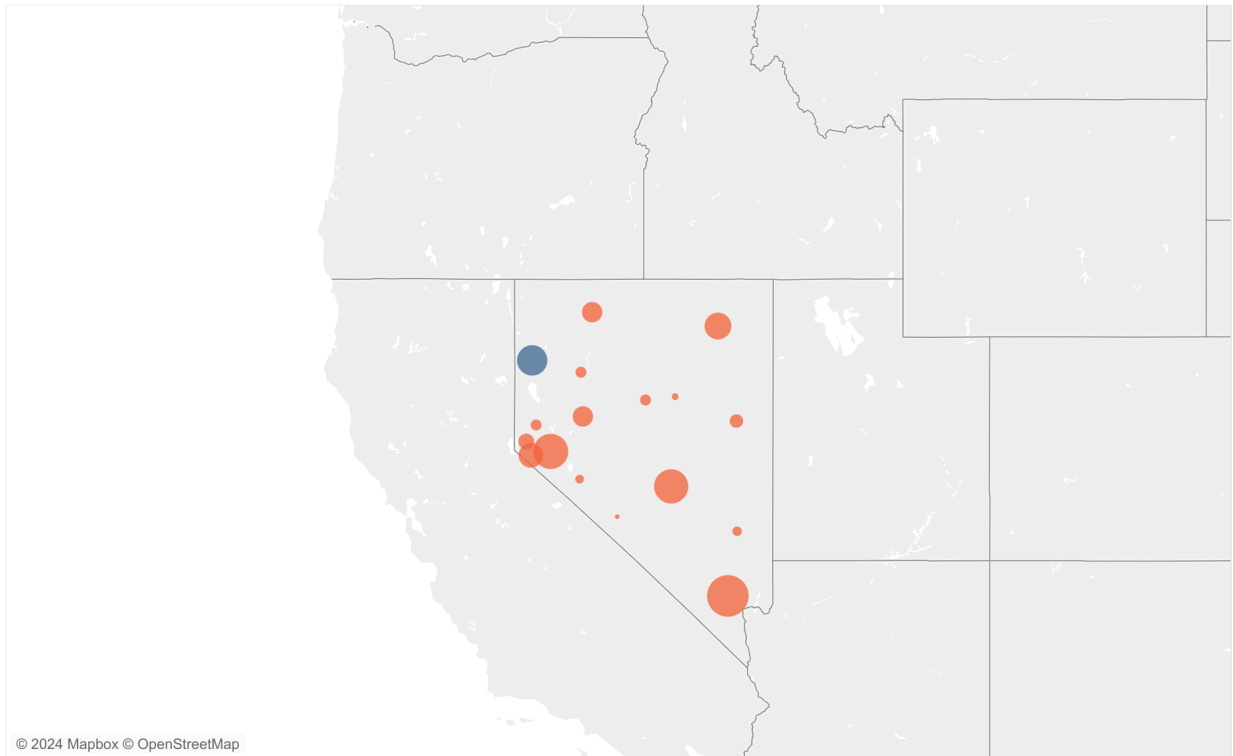
Nevada: Geographic Challenges

Nevada's economic and demographic trends can in part explain the electoral swings that have played out in counties across the state in recent election cycles.

Nevada Presidential Election Vote Growth & Swings 2012 to 2020

Swings by county from 2012 to 2020 (head-to-head contest)

■ GOP Vote Growth & Swung Right ■ DEM Vote Growth & Swung Left

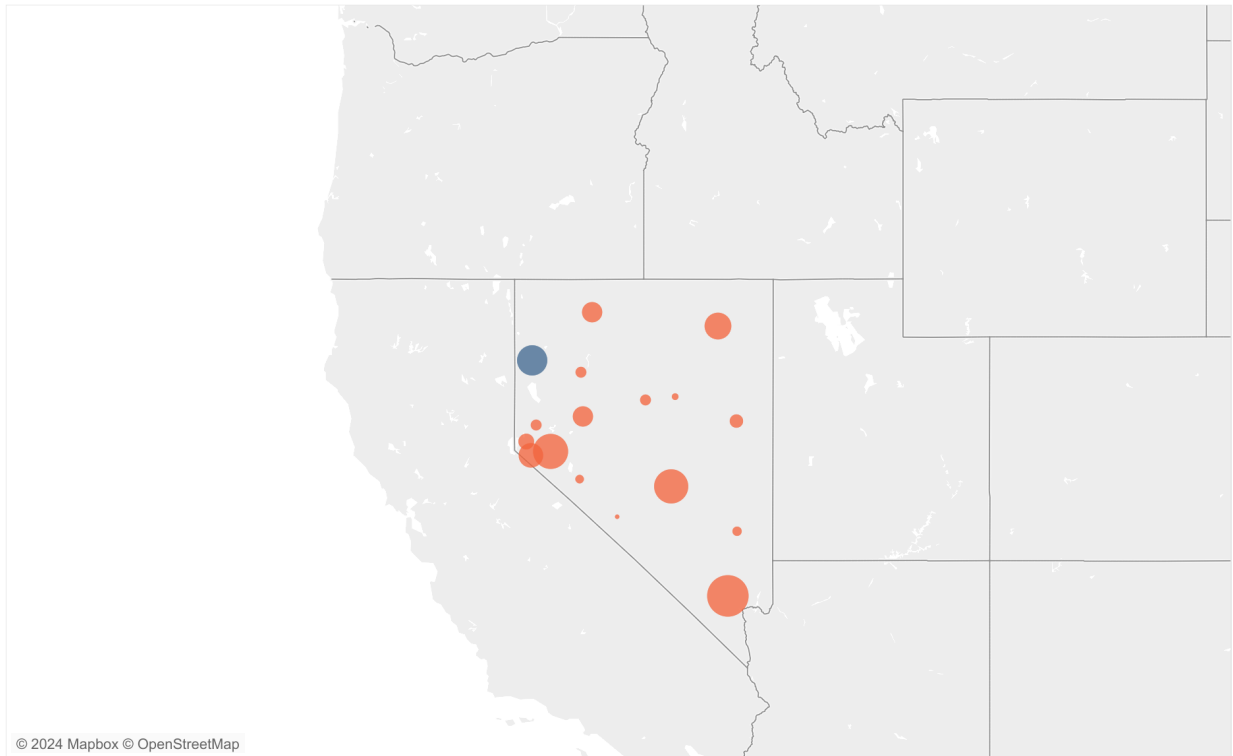


Source: Nevada Secretary of State.

Nevada Presidential Election Vote Growth & Swings 2012 to 2020

Swings by county from 2012 to 2020 (head-to-head contest)

■ GOP Vote Growth & Swing Right ■ DEM Vote Growth & Swing Left



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Source: Nevada Secretary of State.

Republicans are seeing solid growth of their coalition in rural, heavily non-college counties. From 2012 to 2020, there were 382,000 more votes cast statewide. Of those, Republicans netted 33,000 more votes than Democrats. Despite non-metro counties making up only 11% of Nevada's total electorate, the GOP net gained 27,000 votes over Democrats in rural Nevada from 2012 to 2020.

Republicans are performing better in the Democratic stronghold of Clark County. Clark County, which went for Biden by nine points in 2020 and comprises a substantial Hispanic, working-class population, saw a significant 5-point swing to the right from 2012 to 2020, with the GOP netting 8,800 more votes than Democrats in this time period.

Only one county has seen a leftward swing and Democratic presidential vote growth: Washoe County. Between 2012 and 2020, Dems netted 4,700 votes over the GOP. Notably, Washoe is five percentage points more college-educated than

the statewide average and has the highest concentration of college-educated voters of any county in the state.

White college-educated voters have been the saving grace for Nevada Democrats in the Trump era. According Catalist, Democrats saw a 3-point decline in white non-college support in Nevada from 2012 to 2020, but they inversely grew their white college-educated support by three points, which has helped the party to eke out close victories over the last few cycles. ¹⁶

Whether Republicans can expand into the non-college vote further and offset Democrats' college-educated gains may very well determine if the state flips red this year.

Conclusion

The stakes couldn't be higher in 2024, and Nevada will be at the epicenter of the fight. The shifting coalitions within the state are flashing red warning signs. However, as Senator Cortez Masto proved in 2022, the votes are still there in the Democratic coalition to win on the slimmest of margins. When it comes down to it, whichever party actively competes for the working-class, non-college vote and the Hispanic vote will likely carry the state.

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