



AZ Citizens Clean Elections Commission Public Opinion Survey Results

March 2024

Topics

- ❖ The backdrop: Arizona voters want change, ideological fights – and compromise too
- ❖ Update: fresh data on the issues that Arizonans want to hear about most
- ❖ Drilling into the top three: Abortion, Immigration, and the Economy
- ❖ Quick note on foreign policy – that matters too!
- ❖ Where and how to reach people: regional breakdowns and best mediums
- ❖ Takeaways and Insights

Presented by...

Mike Noble
Founder & CEO, NPI

Project Goals

Identify

- Gauge perceptions of Arizona registered and likely voters on top issues
- Learn what issues and debate topics resonate most with Arizona voters in each region and party

1

Discover

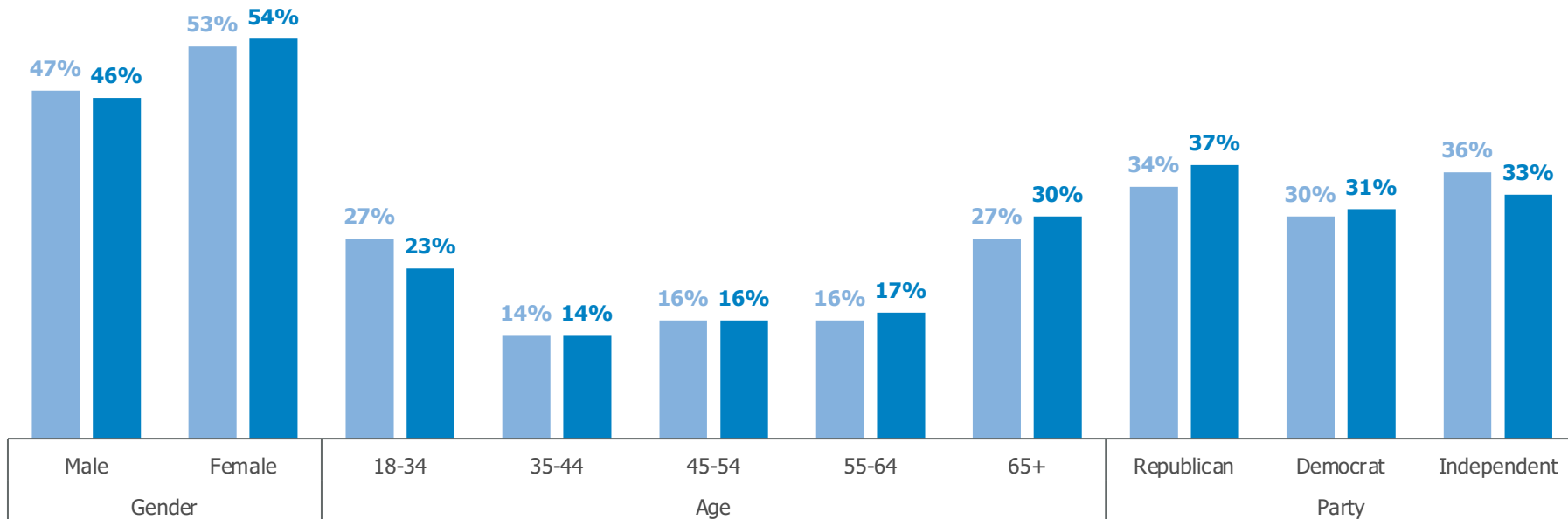
- Look into broad issue categories and granular, smaller issues that matter to Arizonans
- Drill deep on three key issues – economics, immigration, and abortion – driving the conversation
- Provide actionable, strategic recommendations for voter education and debate discussions

2

Note before getting started: Enthusiasm for voting is high, and LVs/RVs are similar. Big ideas in this deck will apply regardless of if you're thinking about LVs or RVs.

Sample Demographics

■ Registered Voters ■ Likely Voters - General Election



Demographics: Gender, Age, Party (n=1634 registered voters)

Subgroup: Likely general election voters (n=1438)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

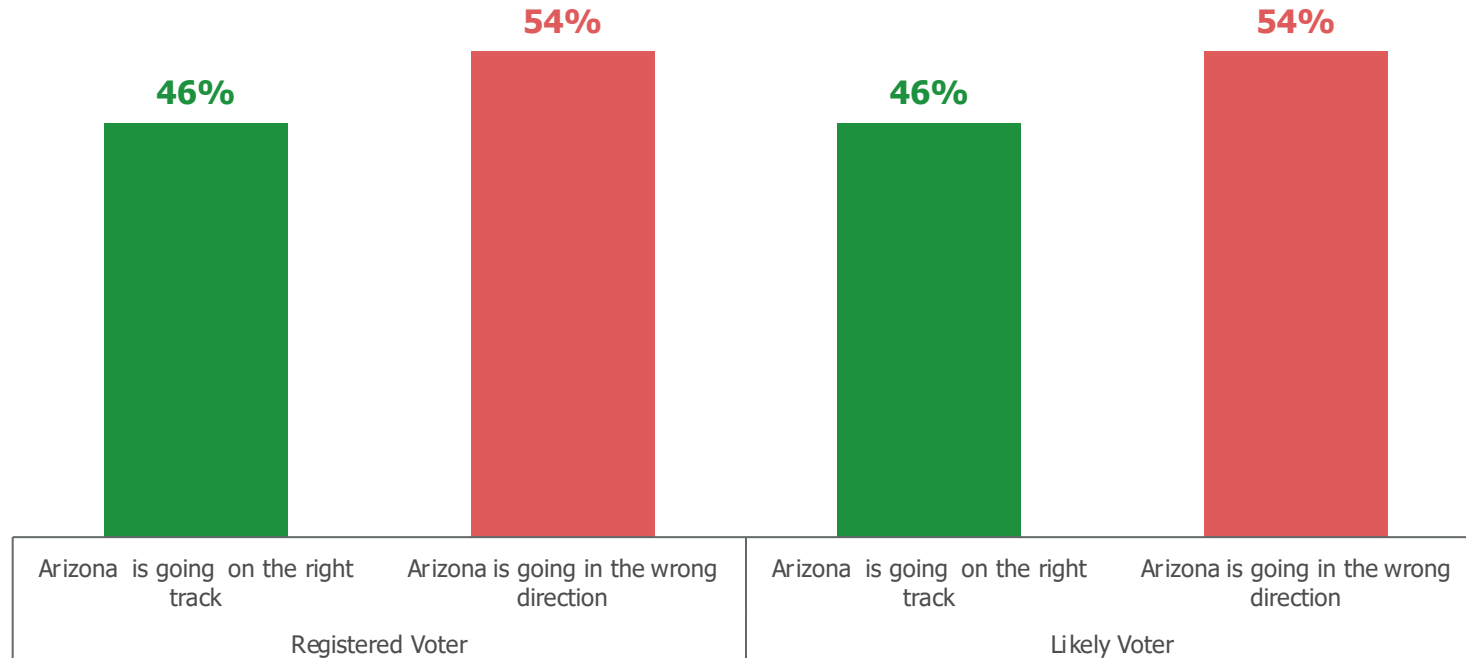
Arizona voters want change.

**To get there, fights – and compromise
– are encouraged.**

An appetite for change

Arizona is (still) heading in the wrong direction...

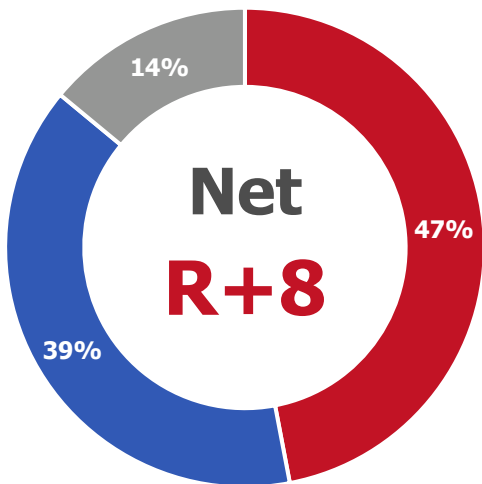
Direction of Arizona



Growing discontent could be huge for Republicans in 2024. Republicans are ahead, but race is still in the single digits.

Preferred Party to Lead AZ

■ Republicans ■ Democrats ■ Neither



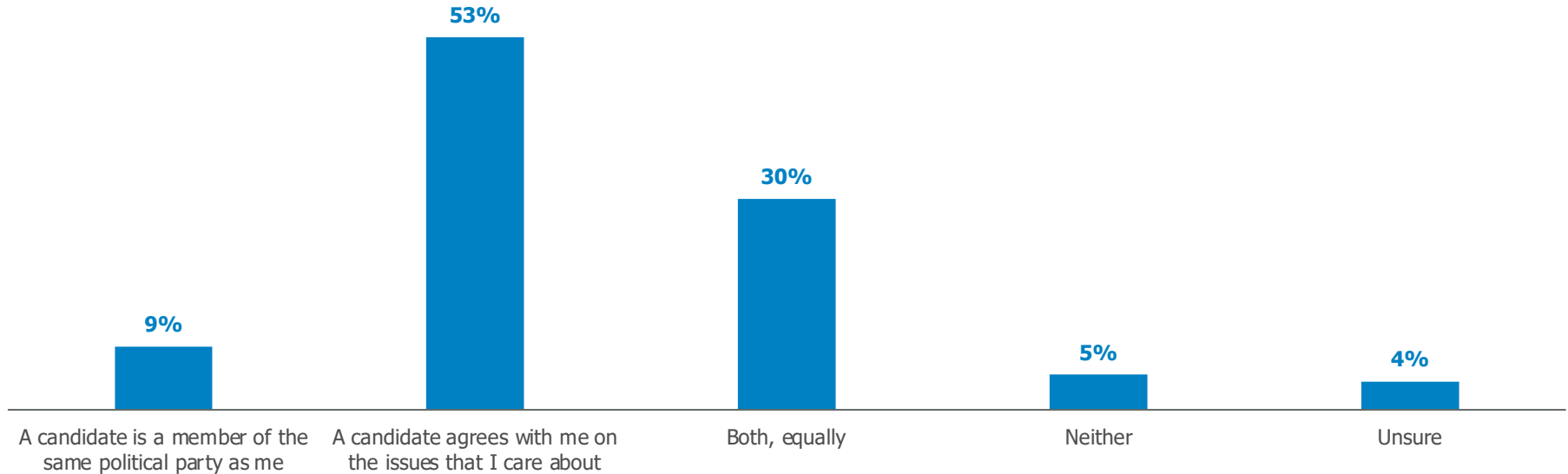
Key Demographics:

- HHI \$50k-\$100k: **R+12**
- Independents: **R+6**
- Maricopa County: **R+6**
- Hispanic/Latinos: **R+4**

**Arizonans want
ideological fighters**

Arizonans care about issues more than party – they want their ideas represented

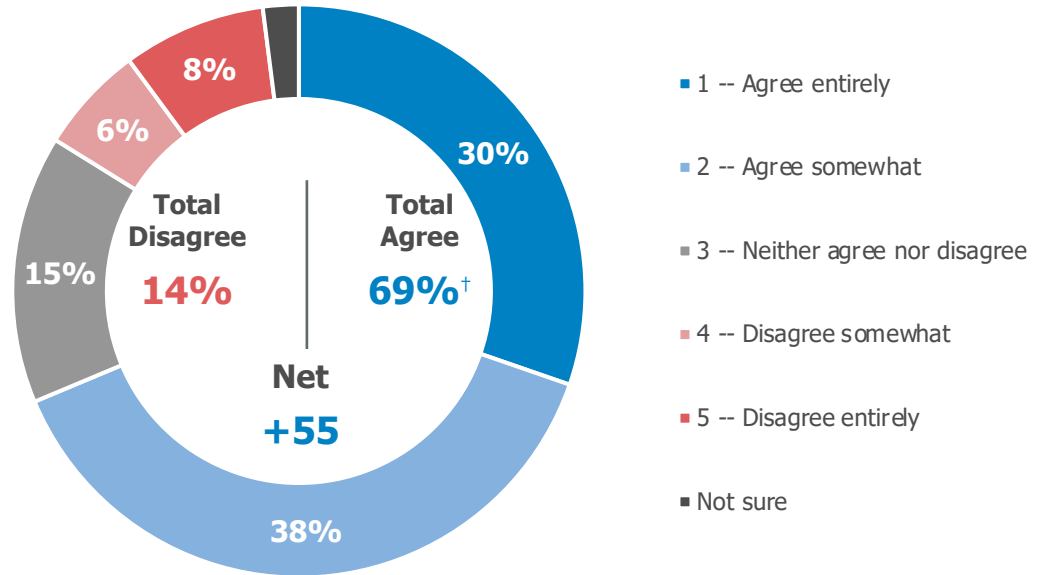
Ideology versus Party



Two-thirds of likely voters reported they would vote for a candidate from a party they disliked if that candidate agreed with them on issues they cared about

- Demographics likely to cross party lines:
 - Independents: +71
 - Ages 35-44: +71
 - Hispanic/Latinos: +67

I am willing to vote for a candidate who is from a political party I dislike, if they agree with me on most issues



Please rate your agreement with the following statements, on a scale of 1 to 5, with 1 meaning you agree entirely and 5 meaning you disagree entirely. (I am willing to vote for a candidate who is from a political party I dislike, if they agree with me on most issues) (n=1438 Likely voters)

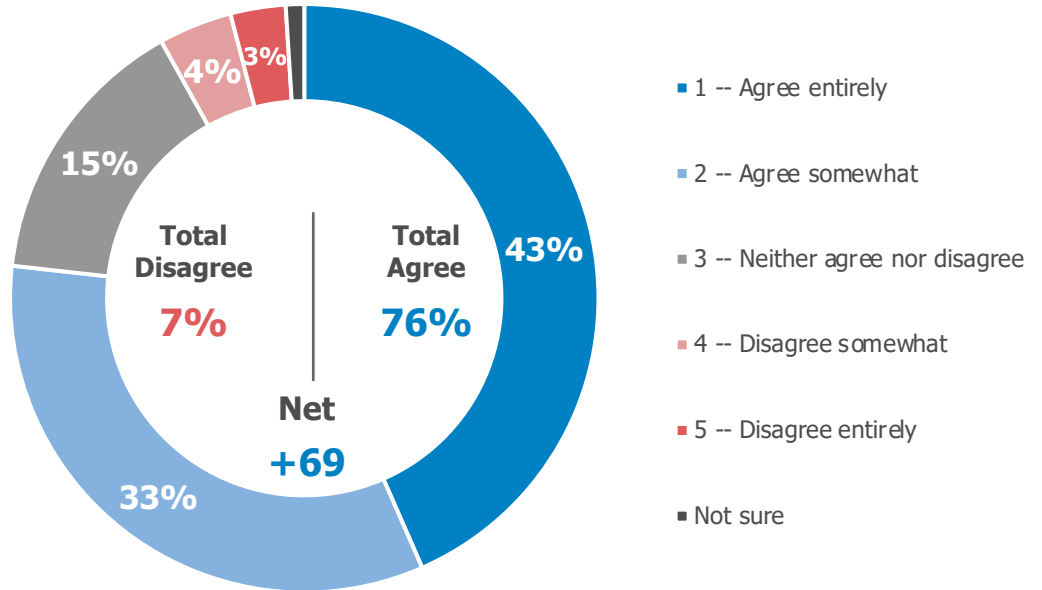
Subgroups: Independents (n=369), 18-34 year olds (n=213), Hispanics/Latinos (n=201)

[†] Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

On issues Arizona likely voters care about, they want a fighter – someone so committed they'll anger others

- Key demographics who want a 'puncher':
 - HS or less: +76
 - Republicans: +75
 - Urban: +74
 - Democrats: +72
 - Men: +72

I want a candidate who will fight for my issues, even if it means angering other politicians



Please rate your agreement with the following statements, on a scale of 1 to 5, with 1 meaning you agree entirely and 5 meaning you disagree entirely. (I want a candidate who will fight for my issues, even if it means angering other politicians) (n=1438 Likely voters)

Subgroups: Men (n=572), Republicans (n=563), Democrats (n=506), HS or Less (n=219), Urban (n=459)

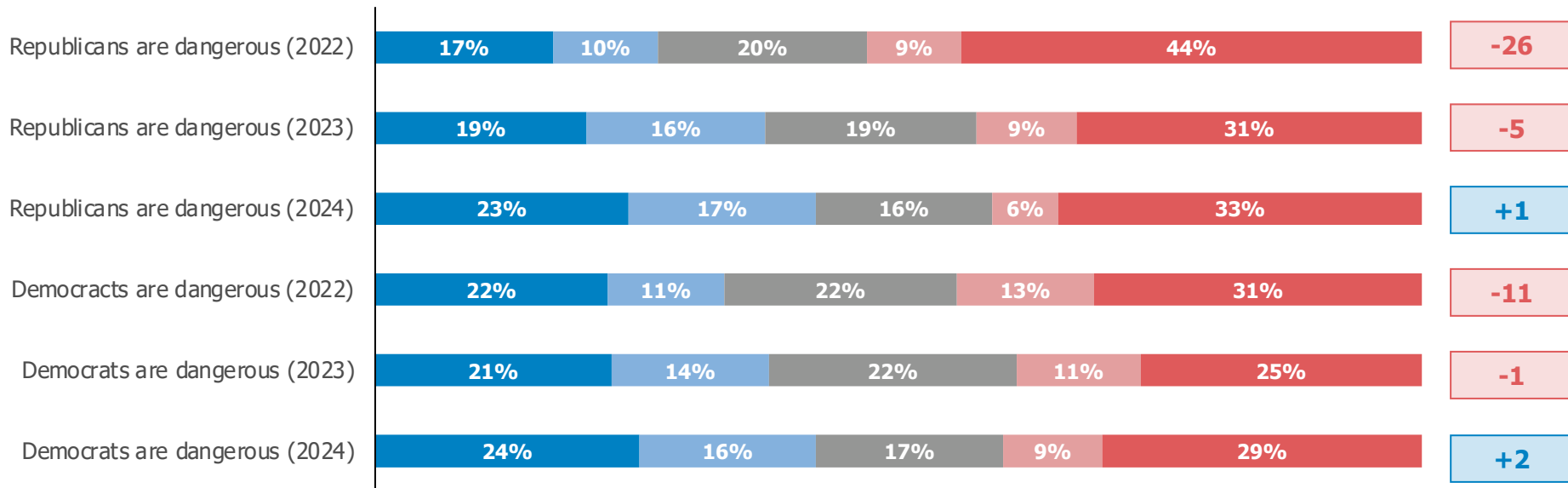
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

And Arizona voters are increasingly likely to see the major parties as dangerous

Respondents' Belief in the Danger of the 'Other' Party

■ Agree entirely
 ■ Agree somewhat
 ■ Neither agree nor disagree
 ■ Disagree somewhat
 ■ Disagree entirely

Net



Please rate your agreement with the following statements, on a scale of 1 to 5, with 1 meaning you agree entirely and 5 meaning you disagree entirely. (Democrats are a danger to democracy; I cannot see myself voting for a Democrat) (Republicans are a danger to democracy; I cannot see myself voting for a Republican) (n=1438 likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

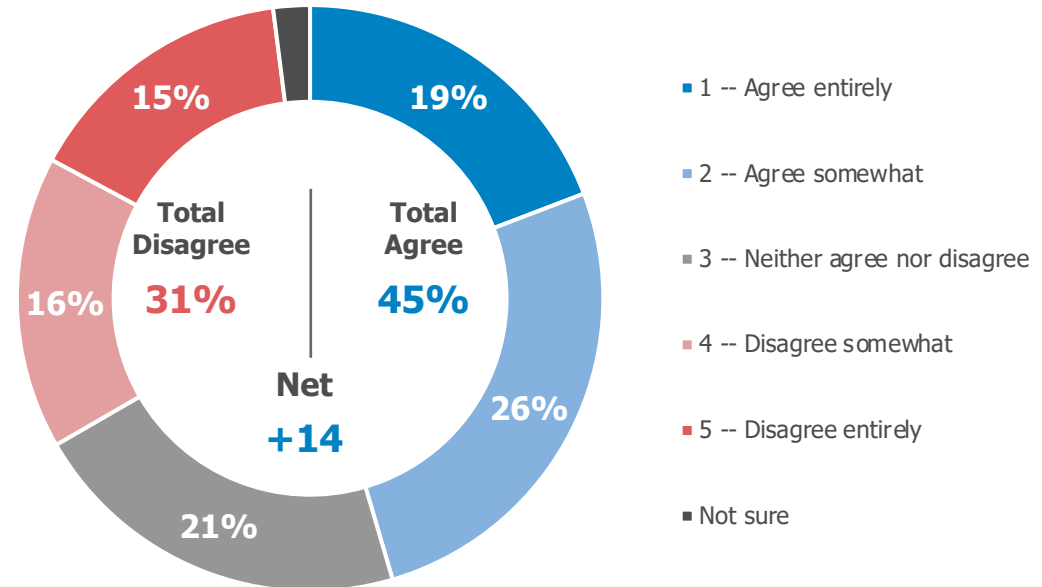
**All that being said,
Arizonans want
compromise too**

Fighting and principles are healthy.

But not everyone wants government to grind to a halt.

- Voters ages 18-34 (+36) are much more likely than voters ages 65+ (-11) to put ideological purity over efficient government
- By a huge margin, Republicans (+32) are more likely than Democrats (+3) or Independents (+6) to be willing to slow down the government over issues they care about

I want my representatives to stand firm on their beliefs, even if it means not much gets done in government



Please rate your agreement with the following statements, on a scale of 1 to 5, with 1 meaning you agree entirely and 5 meaning you disagree entirely. (I want my representatives to stand firm on their beliefs, even if it means not much gets done in government) (n=1438 Likely voters)

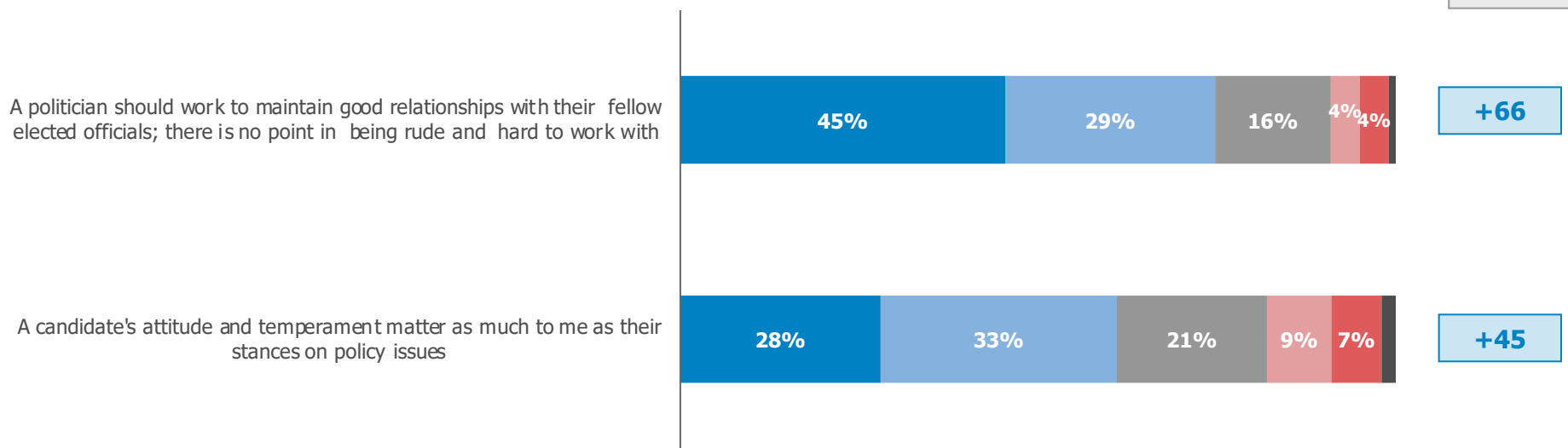
Subgroups: 18-34 year olds (n=213), 65+ year olds (n=498), Republicans (n=563), Democrats (n=506), Independents (n=369)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

And principled fighting does NOT mean mean-spiritedness. No reason to be rude.

Importance of Candidate Collegiality Temperament

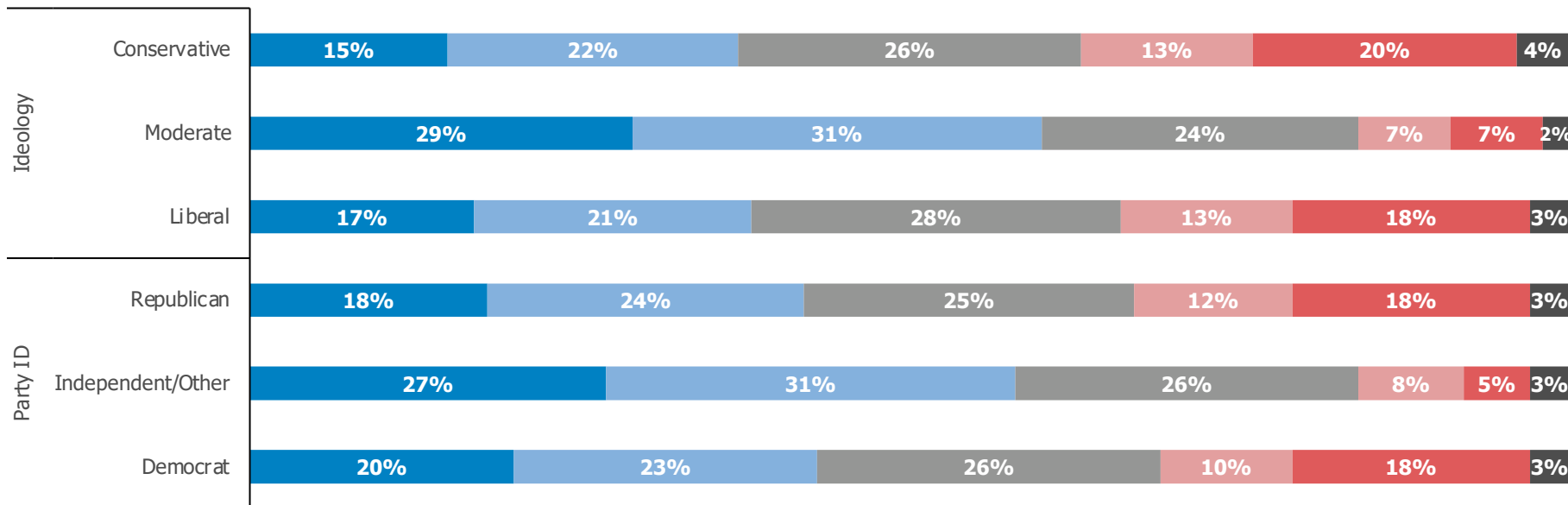
■ 1 -- Agree entirely ■ 2 -- Agree somewhat ■ 3 -- Neither agree nor disagree ■ 4 -- Disagree somewhat ■ 5 -- Disagree entirely ■ Not sure



Many voters – especially those who see themselves in the middle of the ideological spectrum – like policies from BOTH sides

Respondents who Like Policies from Both Parties

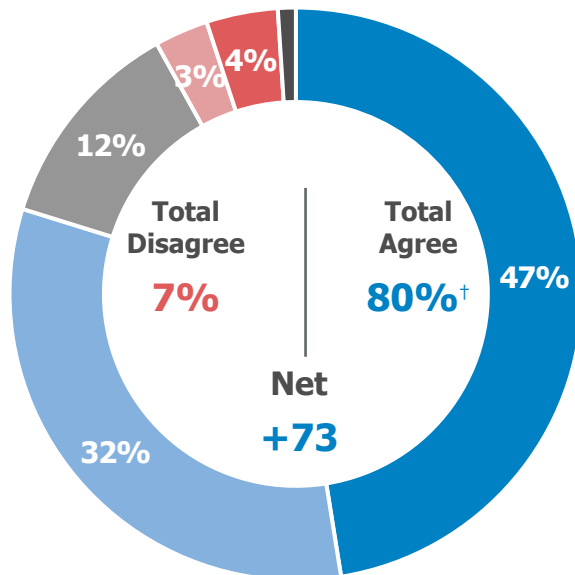
1 -- Agree entirely 2 -- Agree somewhat 3 -- Neither agree nor disagree 4 -- Disagree somewhat 5 -- Disagree entirely Not sure



But at the end of the day, likely Arizona voters want the parties to work together, even if it means compromising some issues

I want both political parties to work together, even if it means compromising on some important issues

- 1 -- Agree entirely
- 2 -- Agree somewhat
- 3 -- Neither agree nor disagree
- 4 -- Disagree somewhat
- 5 -- Disagree entirely
- Not sure



Key Demographics:

- Independents: **+74**
- Maricopa County: **+72**
- HHI \$50k-\$100k: **+69**
- Hispanic/Latinos: **+66**

Key Takeaways

- AZ heading in the wrong direction as Democrats control the governorship and presidency. This could open the door for a big win in 2024 for Republicans – the party likely voters say should run the state.
- Arizonans say they want an ideological fighter. BUT there are limits: They don't want these fights to prevent solutions and compromise.

Insight: Voters value principle AND compromise. Debate questions should give candidates the chance to draw contrasts, talk about what they'd change, AND how they would make it work with the other side.

**The issues that matter
most**

Our Multilayered Approach

We allow people to select from 50 issues, each of which are slotted into larger categories

- For instance, someone could select “Jobs/Economy (taxes)” OR “Jobs/Economy (gas prices)”

We used a multi-stage question

- Allow people to select as many issues as they want at first (“want to know” issues)
- Then require them to pick their top three (“want to know more”)
- And lastly, a single most important issue (“need to know” issues)

This allowed us to get a sense for what people want to know about in general, and what they want to know about the most

- We also broke this data down by likely voter and likely primary voters from each party

This is truly unique – most surveys do not get this much detail.

For the next section, there were 12 total categories a respondent could choose issues from...

Healthcare

Government

Jobs/Economy

Abortion

Elections

Infrastructure

Education

Gun Policy

Housing

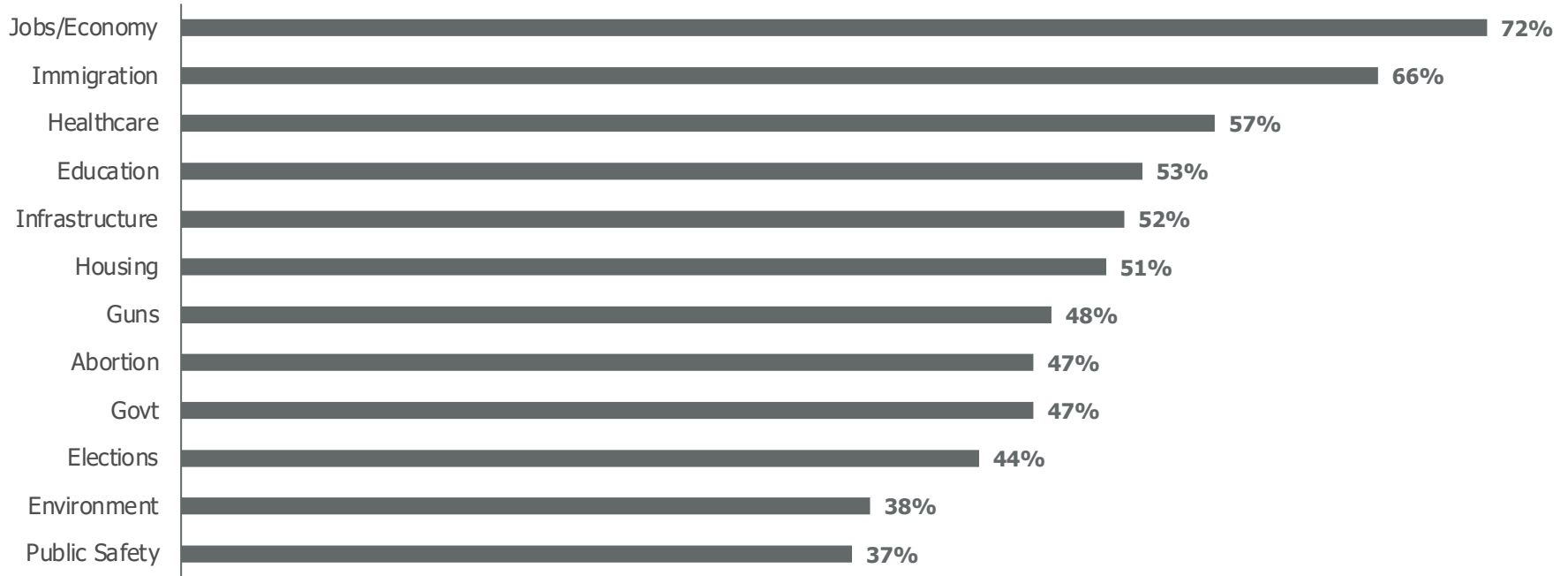
Environment

Public Safety

Immigration

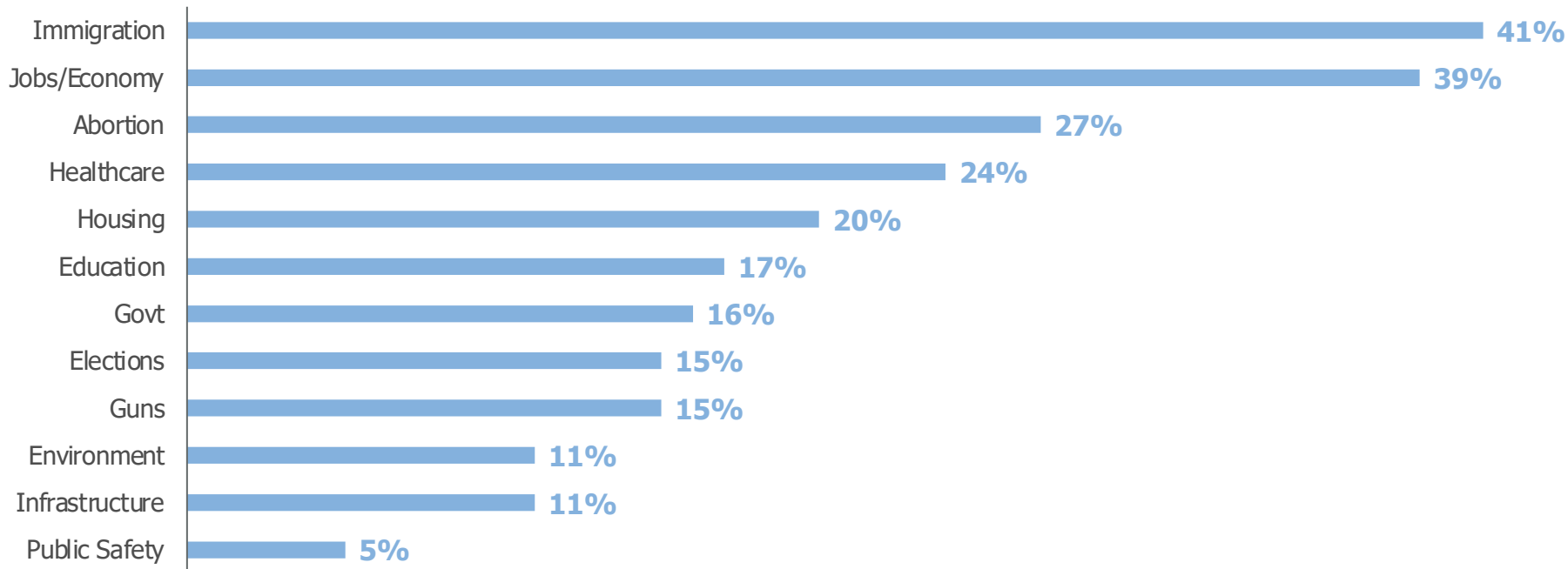
Most pressing issue topics for Arizonans

Top Issue (Select All)



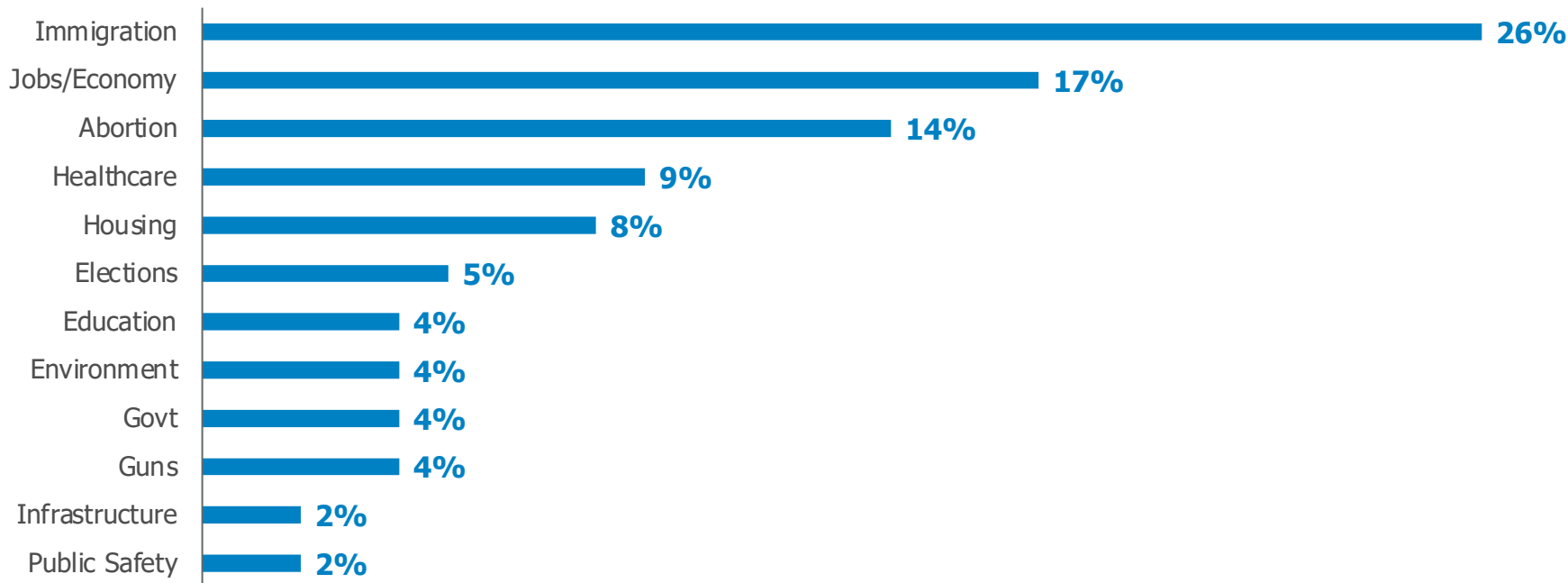
Top 3 pressing issue topics

Top Issue (Select Three)



When asked to select a single most important issue, registered voters and likely voters once again lined up with Immigration, Jobs/Economy, and Abortion as the top three

Top Issue (Select One)



In the “select all” group, the top single issues are Border Security (Immigration), Inflation/Rising Prices (Jobs/Economy), and Affordable Housing (Housing). Those issues stayed near the top.

Issue	Top Issue (Select All)	Top Issue (Select 3)	Top Issue (Select 1)
Border Security	53%	33%	22%
Inflation/Rising Prices	47%	22%	10%
Affordable Housing	43%	18%	7%

Q) Candidates for political office have positions on many issues facing Arizona. Of the following issues, which are important for you to know a candidate's position on when you are deciding whom to vote for in an election for state office?

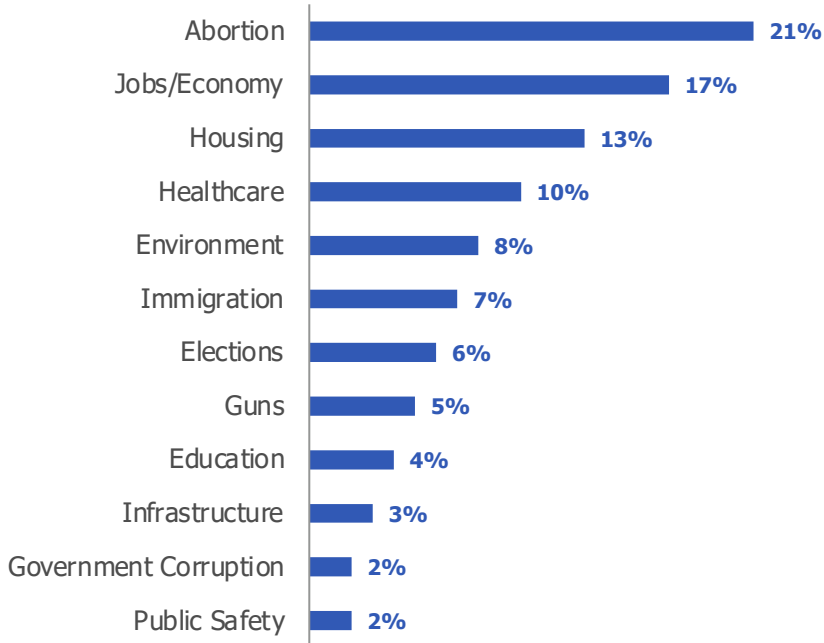
Q) Of the issues you chose in the last question, which are the three most important for you to know a candidate's position when you are deciding how you will vote?

Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=1438 likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Democrats: Social issues, quality of life, and, of course, the economy

Top Issue (Select One) (among Democrats)



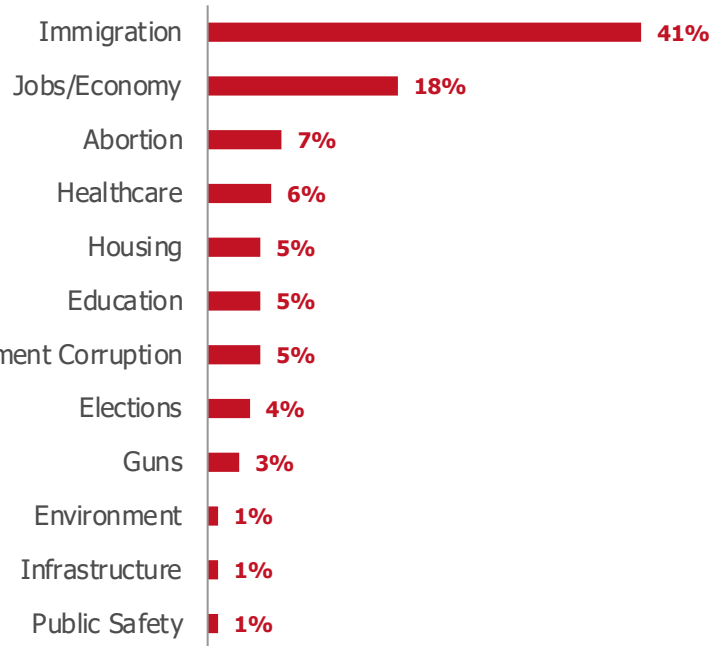
"I believe the issue of **abortion** and reproductive rights is between a woman, her family and her doctor and there should be no laws interfering with that." – **White woman, age 65+, Maricopa County**

"**Inflation** has cost me much higher daily expenses and unable to save more" – **Asian woman, age 45-54, Maricopa County**

"The current **housing** market currently makes reasonable housing for working Americans difficult to achieve. From the increases in mortgage interest in buying new homes to the effect it had on rental prices" – **Hispanic/Latino man, age 35-44, Pima County**

Republicans: Immigration first, economy second, everything else far behind

Top Issue (Select One) (among Republicans)



"Because there is a **crisis at the border** right now and I would want people in the government who are willing to stand up to Joe Biden and take steps to close the Arizona border to improve the safety and job security for the people here legally." – **White woman, age 18-34, Maricopa County**

"**Inflation** is still very present. We are being led to believe it is getting better, but it is still very much an issue. Prices are rising every day." – **White woman, age 65+, Mohave County**

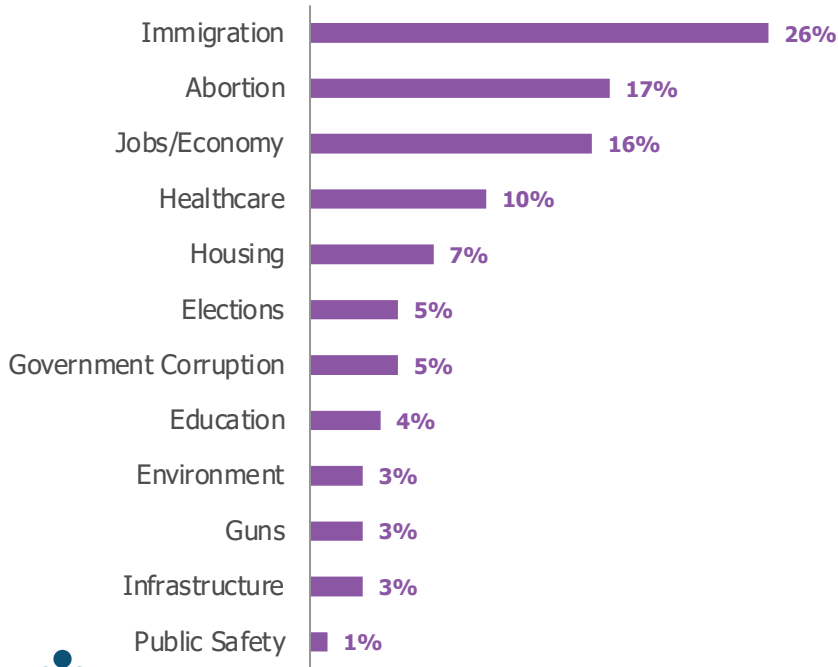
"**Abortion** is not healthcare and any candidate that doesn't value the life [of] unborn babies can't be trusted to make other important decisions." – **Hispanic/Latino man, age 35-44, Maricopa County**

Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=563 Republicans)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding

Independents: They care about jobs/the economy AND issues from both sides

Top Issue (Select One) (among Independents)



Illegal **immigration** has a financial burden on all taxpayers. – *Mixed-race male, age 55-64, Pima County*

Although I do not personally believe in **abortion**, it is not my right to restrict a woman's choice for her own body. – *White male, age 45-54 years, Pima County*

Because everything in the **economy** right now is unaffordable, you know wages don't match the prices that are going up, and living is affordable at the moment. – *Black woman, age 18-34, Maricopa County*

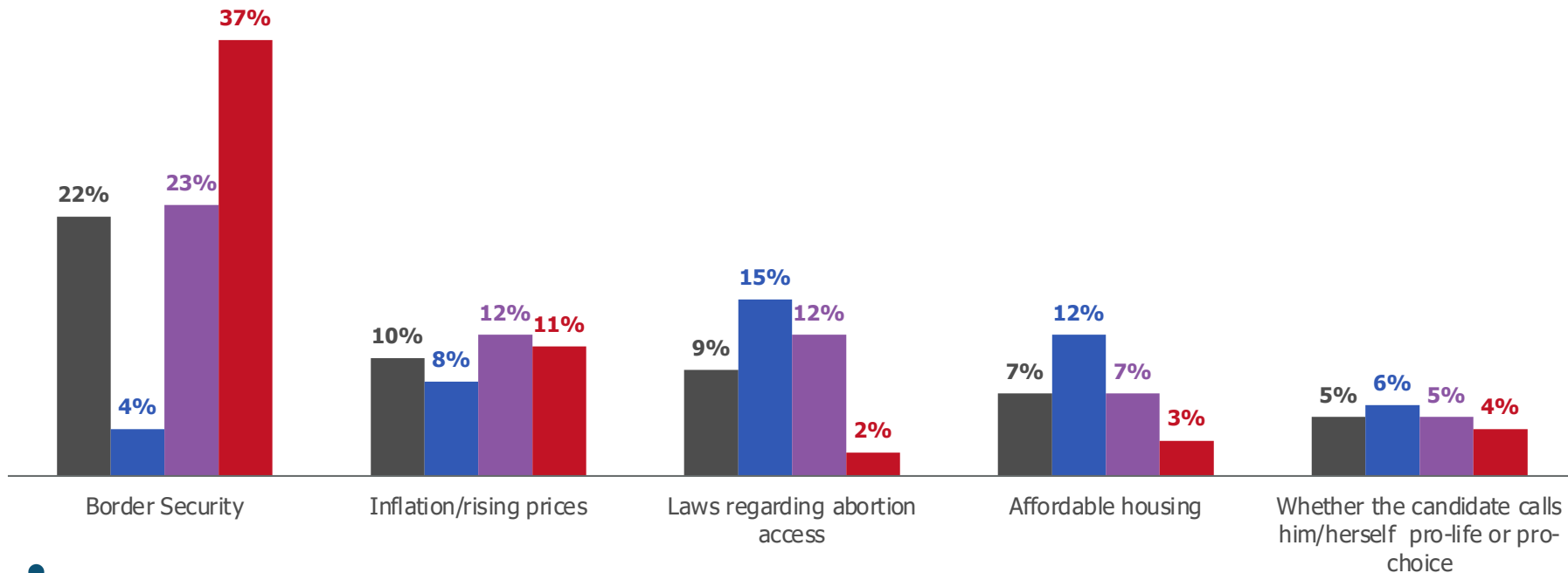
Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=369 Independents)

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Inflation – the rare key issue that brings the different partisan worlds together

Top Issue (Select One)

■ Likely Voter ■ Democrat ■ Independent/Other ■ Republican



Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=1438 likely voters)

Subgroups: Independents (n=369), Democrats (n=506), Republicans (n=563)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding

The local issue: WATER – In an open-ended question on local issues, perceived water scarcity is impacting voters

“Water supply is down, and Arizona has been suffering under a heat dome every summer. Lives are in danger in a city with very few places to find shade and water without the ability to get help until they dehydrate or worse...prevent heat-related issues that can quickly become fatal.” –

Woman, age 35-44, Mohave County

“Too much growth, not enough water.” – ***Man, age 35-44, Yuma County***

“Development without concern for water availability” – ***Man, age 65+, Maricopa County***

“Water is the main local issue for determining my vote” – ***Woman, age 55-64, Pima County***



Key Takeaways

- Republicans need to know about immigration – that matters to them more than anything else.
- For Democrats, abortion matters most. But economics and other core life concerns – like housing affordability and healthcare – matter too.
- Everyone wants to talk about inflation. And don't forget about WATER.

INSIGHT: Immigration, abortion and inflation are the key topics. But different voters care about each issue.

The key: tailoring topics to the audience.

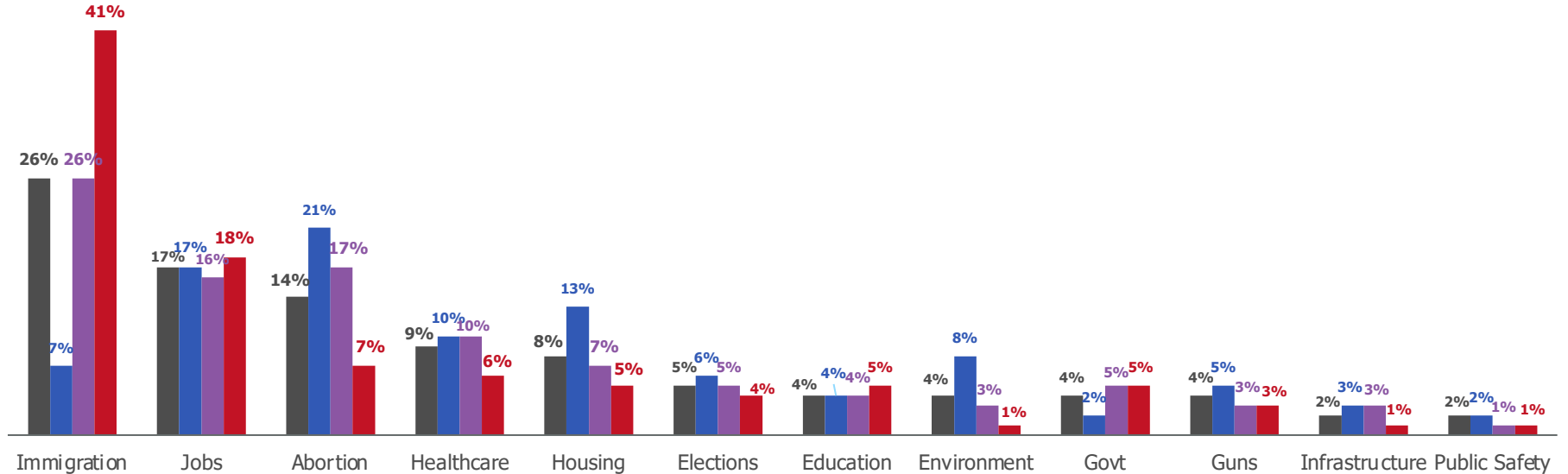
**Getting deeper on the big three:
abortion, economics and immigration**

**Immigration:
A pro-restriction mood.
A core GOP concern.**

Immigration is a top issue among Republicans and Independents

Top Issue (Select One)

■ Likely Voters ■ Democrats ■ Independents ■ Republican



Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=1438 likely voters)

Subgroups: Independents (n=369), Democrats (n=506), Republicans (n=563)

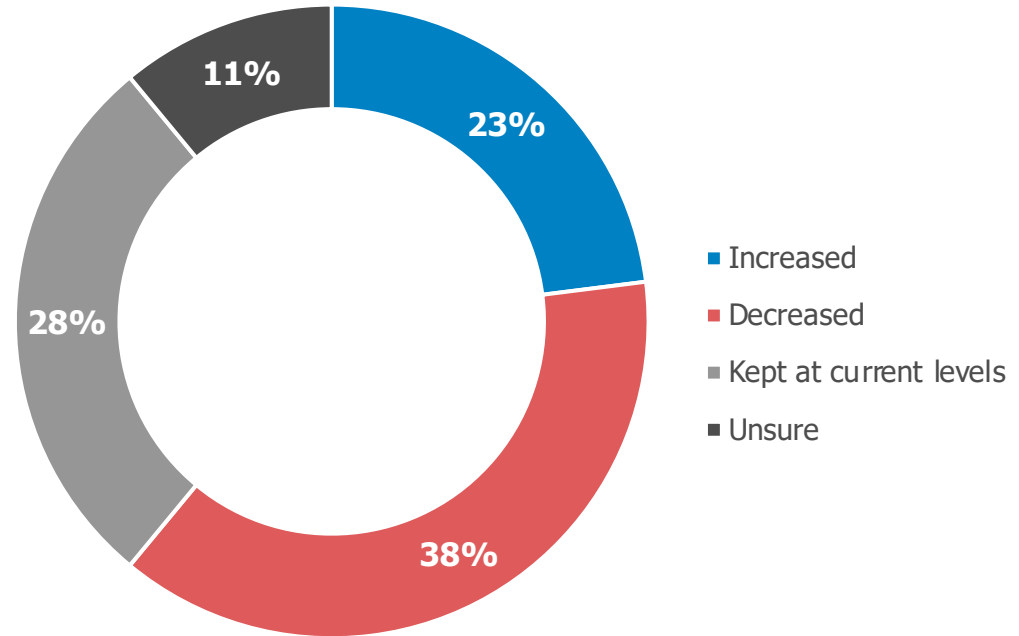
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But voters have turned against immigration

Even LEGAL immigration

- Republicans, conservatives, and voters from rural counties want to decrease legal immigration the most. No surprise.
- But, even among Democrats, the results are split (35% increase, 22% decrease, 28% keep same).
- The people who care the most want the most restriction: 59% who said Border Security was their top issue said that LEGAL immigration should be decreased.

Future Levels of Legal Immigration



Q) Should legal immigration be increased, decreased, or kept at current levels? (n=1438 likely voters)

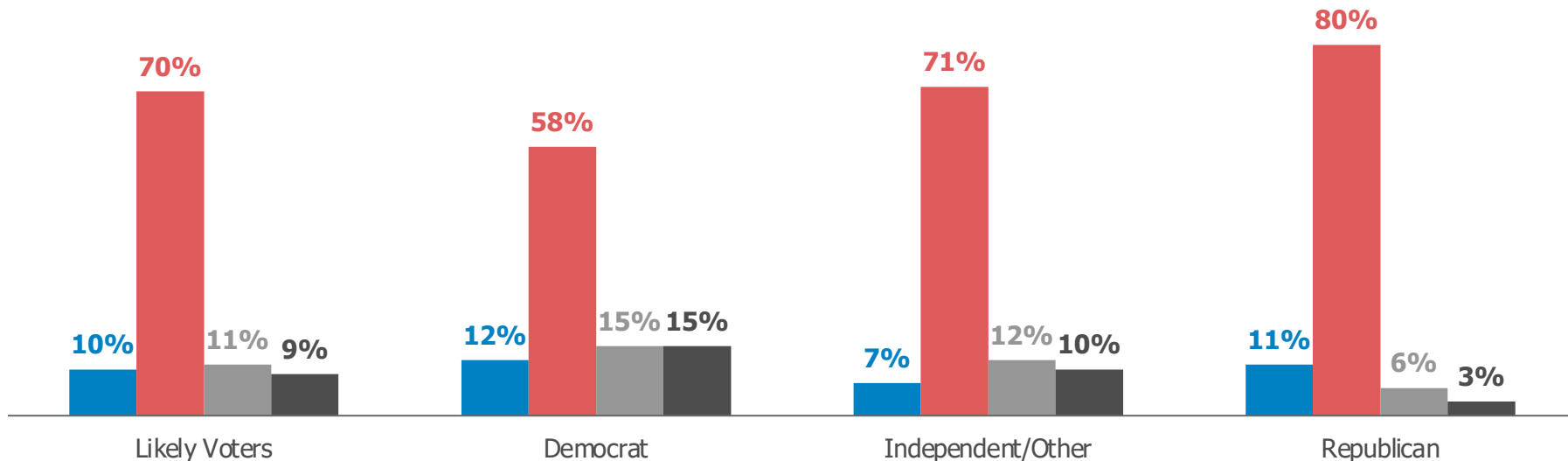
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On illegal immigration, EVERYONE is united. Majorities of each party want illegal immigration to DECREASE.

Future Levels of Illegal Immigration

■ Increased ■ Decreased ■ Kept at current levels ■ Unsure

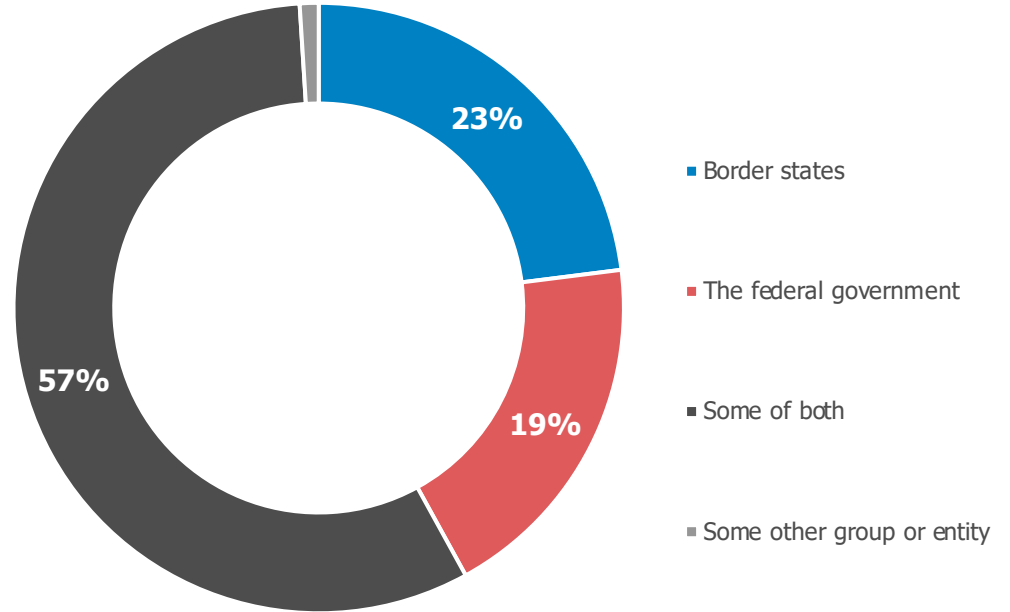


This issue is LOCAL: Arizonans think the border states should have a say on immigration policy

Democrats favor the federal government, while Republicans favor states' rights.

- Republicans:
 - Border States: 29%
 - Federal Gov't: 13%
- Democrats:
 - Border States: 16%
 - Federal Gov't: 28%
- Independents:
 - Border States: 23%
 - Federal Gov't: 17%

Border Security Authority



Q) Who should have authority over border security -- border states, the federal government, both, or another group? (n=1438 likely voters)
Subgroups: Independents (n=369), Democrats (n=506), Republicans (n=563)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding

Immigration Takeaways

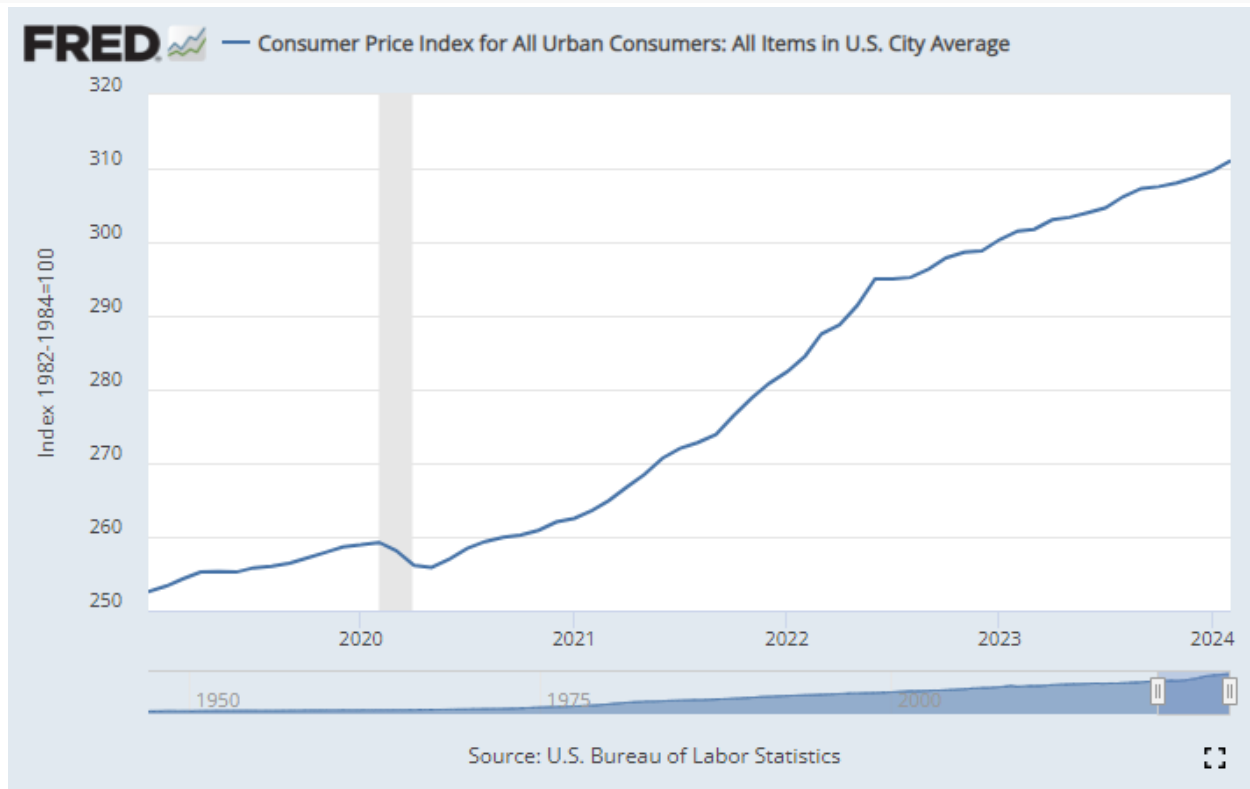
- Arizona is in a pro-restriction mood – many against legal AND illegal immigration.
- This is THE key issue for Republicans – anyone who wants to communicate with Republicans needs to think hard about this issue.
- Arizonans are not farming this out to the federal government: They want a seat at the table.

INSIGHT: Voters want to know what politicians THINK and will DO to change the border situation. No skating past this.

To voters, legal and illegal immigration are both issues.

Economics: Everybody Hurts

CPI – an inflation measure – has slowed down. Growing more slowly. Good news, right?



<https://fred.stlouisfed.org/series/MEDCPIM158SFRBCLE> Accessed: 3/28/2024

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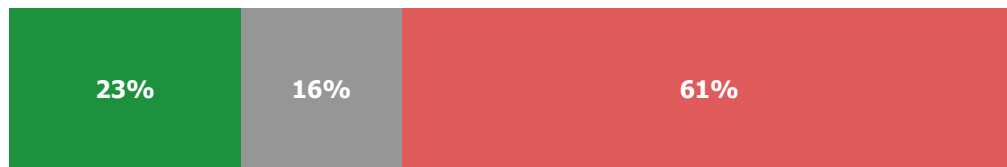
Arizonans disagree.

6 in 10 say the national economy is getting worse.

- Conservatives (80%), Republicans (79%), and Independents/Another Party (66%) believe that the national economy is getting worse.
- Democrats (25%), people with a high school level education (21%), and moderates who do not lean left or right (23%) are likelier to believe the economy is staying the same.
- People who identified as “very liberal” (45%), Democrats (42%), and liberals (42%) were more likely to say things were “getting better.” But even that group wasn’t majority optimistic.

National Economy is...

■ Getting better ■ Staying the same ■ Getting worse



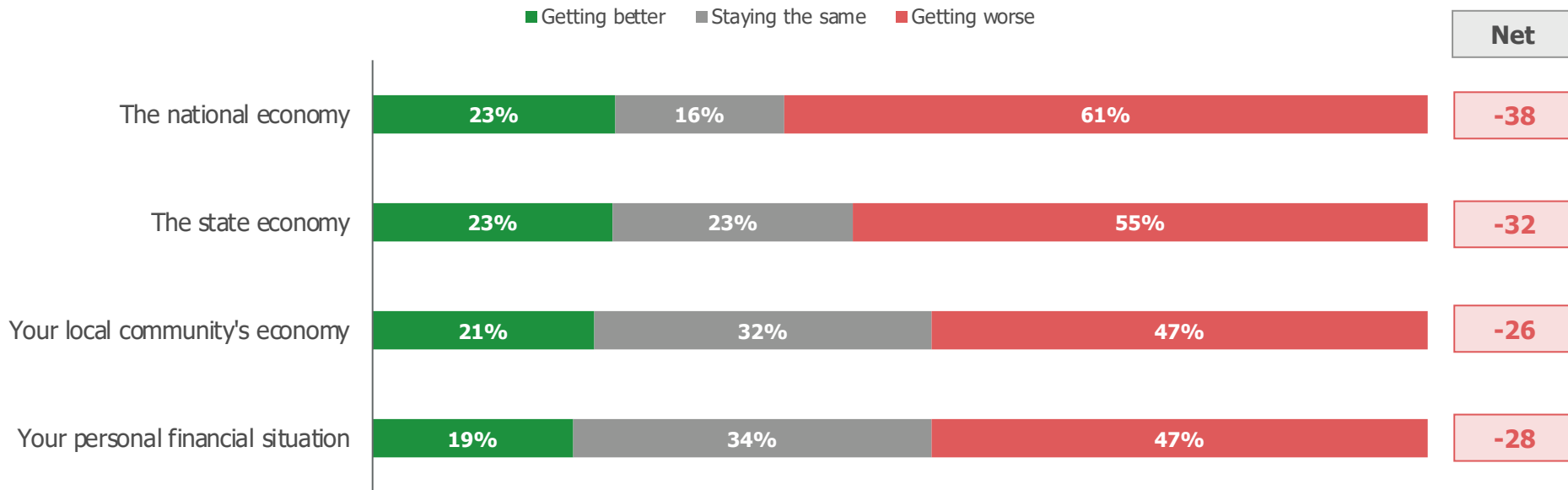
Q) In each of the following areas, would you say that the economic/financial situation is getting better, getting worse, or staying about the same? (The national economy) (The state economy) (Your local community's economy) (Your personal financial situation) (n=1438 likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding



These voters aren't just assessing the nation. At every level, the biggest chunk of voters says the economy is "getting worse."

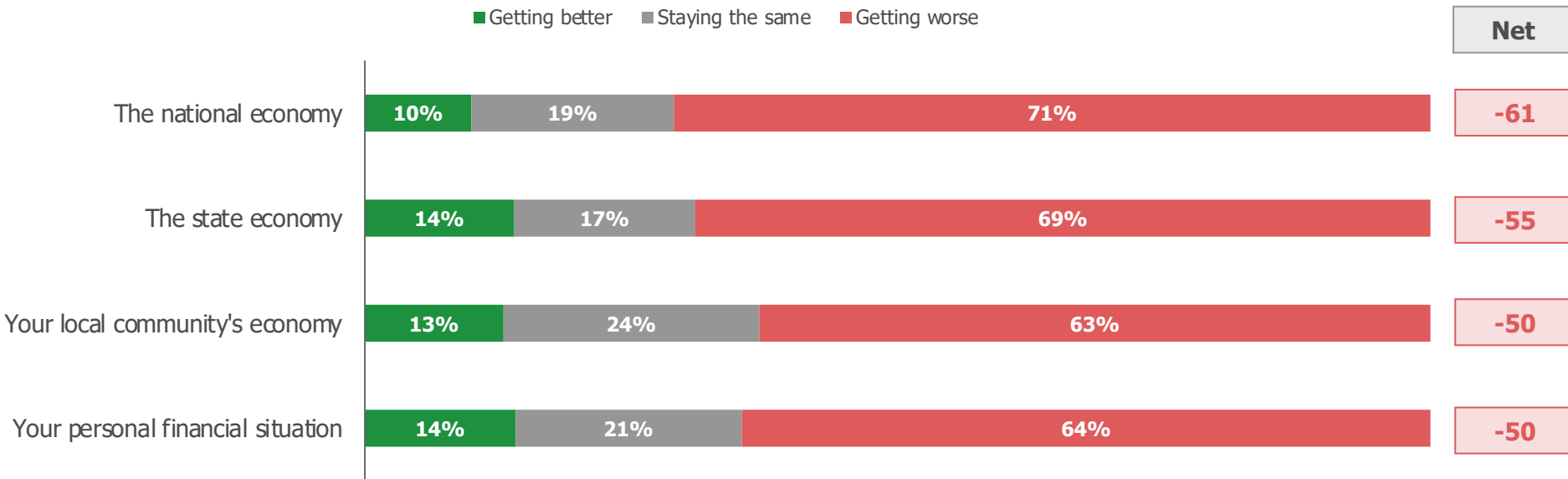
Assessment of Different Levels of the Economy



A big cause of this misery: INFLATION. Among those who listed inflation as a top issue, majorities said EVERY level of the economy was getting worse.

Assessment of Different Economies (among voters who rank Inflation/Rising Prices as their Top Issue)

■ Getting better ■ Staying the same ■ Getting worse

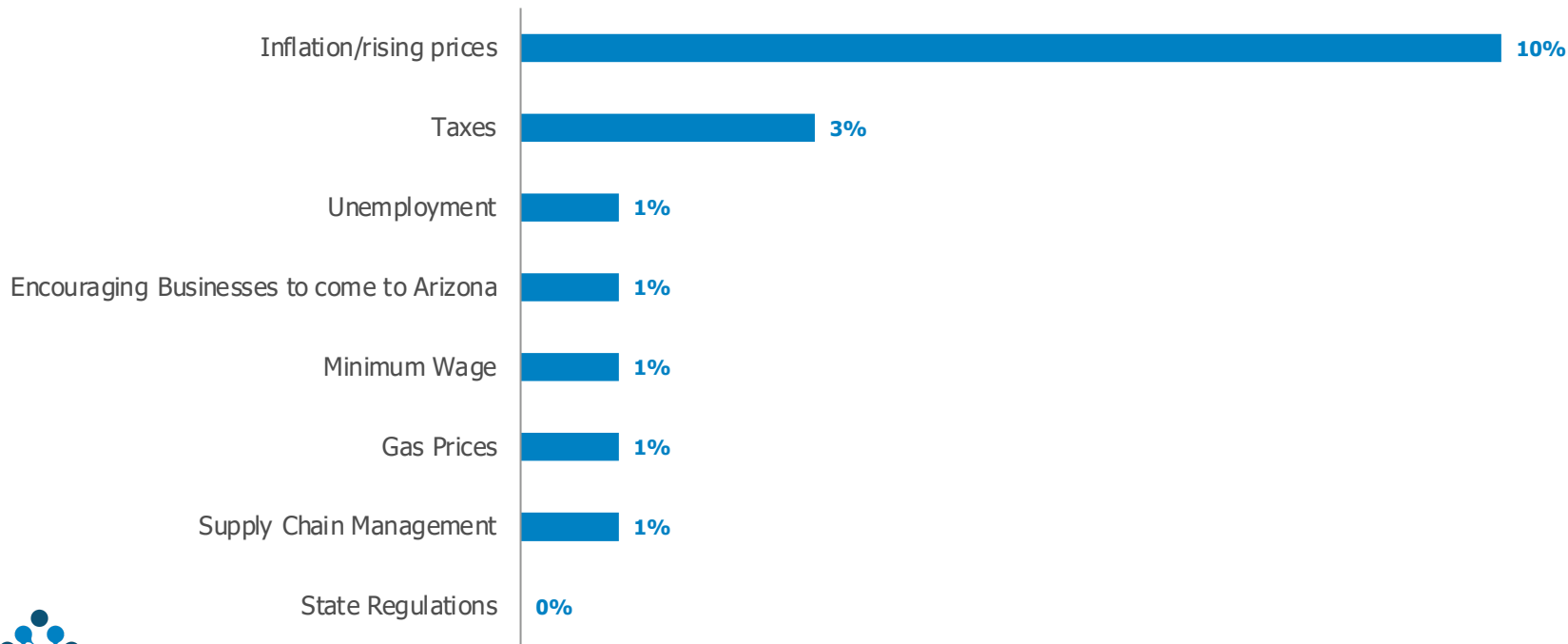


Q) In each of the following areas, would you say that the economic/financial situation is getting better, getting worse, or staying about the same? (The national economy) (The state economy) (Your local community's economy) (Your personal financial situation) (n=143 likely voters who rank Inflation/Rising Prices as their Top Issue)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding

And inflation dominates other concerns. It's the top issue driving jobs/economy pain.

Percentage who picked each issue as #1 – Jobs/Economy sub-issues



Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? † Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding

Economy Takeaways

- Inflation is a miserable economic problem: everyone who regularly buys goods (read: essentially everyone) feels it to some degree.
- It's not just an abstract problem or an issue of concern somewhere else in the country. It's harming every level of the economy.

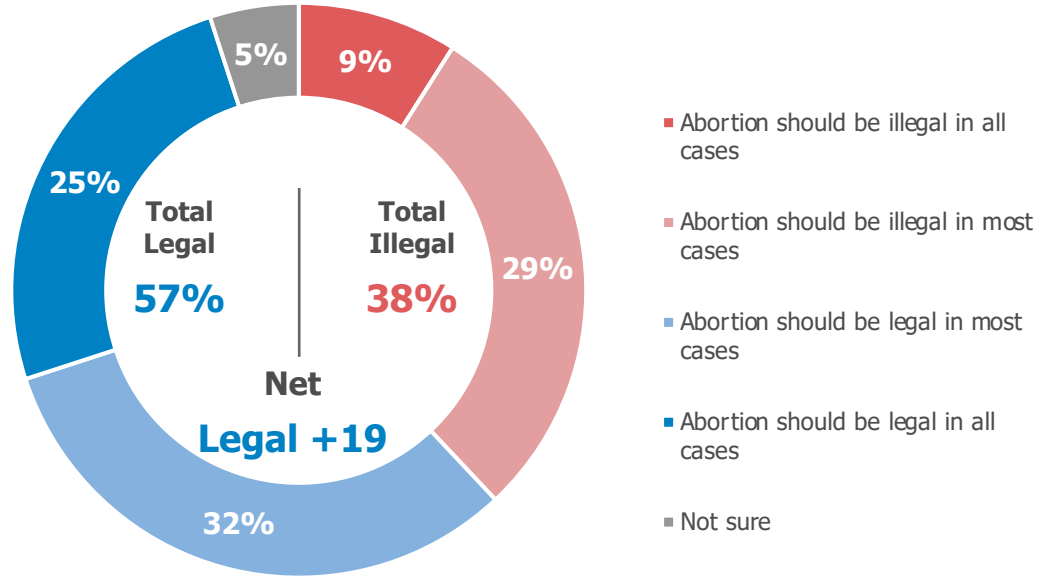
INSIGHT: Inflation is the biggest economic problem. But politicians can't just talk about it on the national level. Solutions need to address the state, local communities , and individuals.

Abortion: Advocating for Legality

The topline: likely voters want legal abortions

- Key Demographics:
 - Independents: Legal +26
 - Maricopa County: Legal +20
 - HHI \$50k-\$100k: Legal +17
 - Hispanic/Latinos: Legal +16

Personal Abortion Opinion



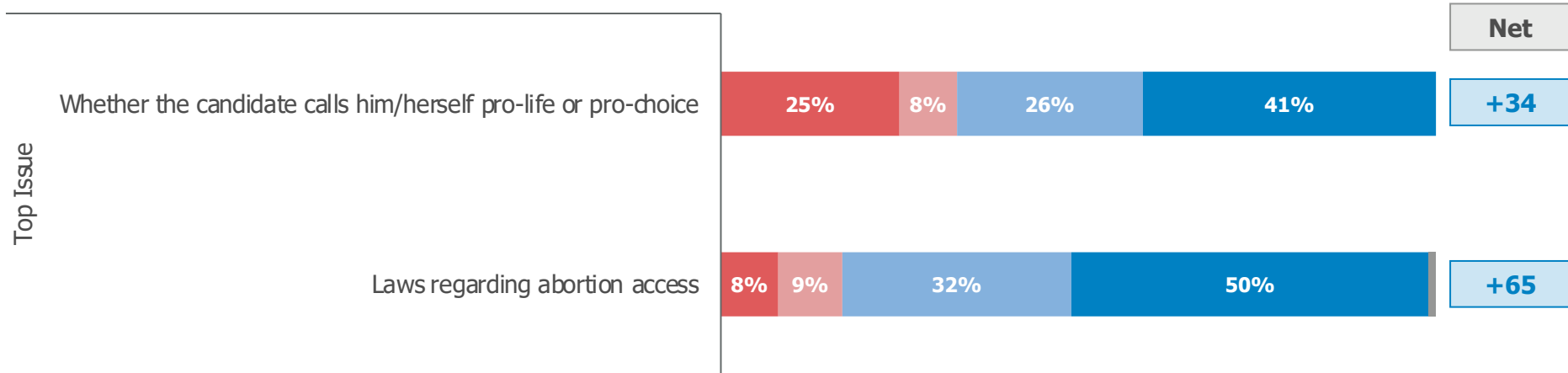
Q) On abortion, which of the following statements best matches your opinion? (n=1438 Likely voters)
Subgroups: Independents (n=369), Hispanics/Latinos (n=201), Maricopa County (n=831), HHI \$50k-\$100k (n=581)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

If someone said abortion was their top issue, they were probably pro-choice.

Personal Abortion Opinion

(among voters who ranked abortion-related topics as their top issue)

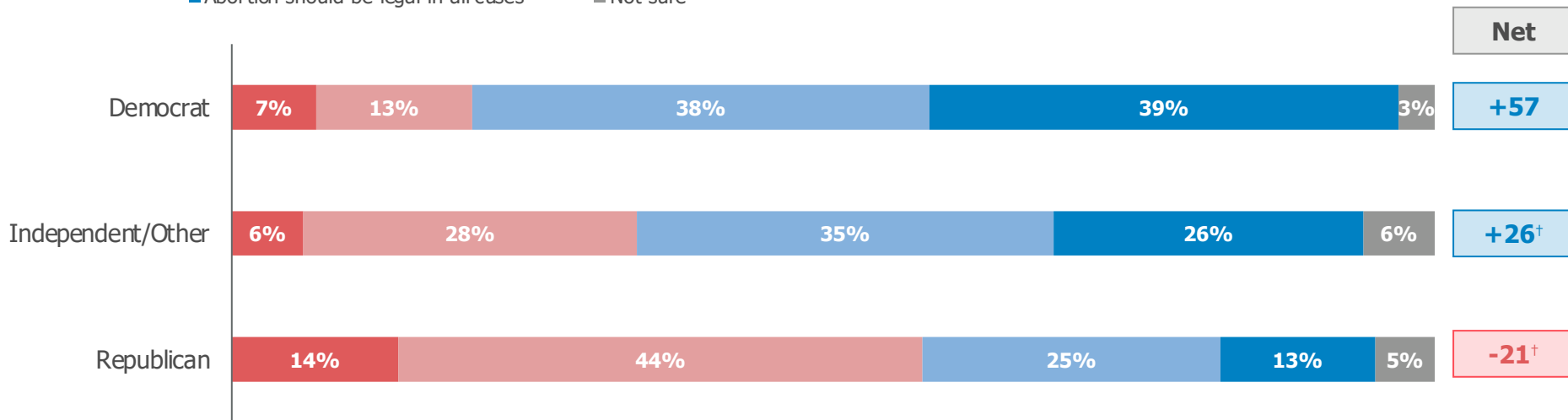
- Abortion should be illegal in all cases
- Abortion should be illegal in most cases
- Abortion should be legal in most cases
- Abortion should be legal in all cases
- Not sure



This is a wedge issue: Democrats are more united than Republicans – and Independents back the pro-choice side.

Personal Abortion Opinion

■ Abortion should be illegal in all cases ■ Abortion should be illegal in most cases ■ Abortion should be legal in most cases
■ Abortion should be legal in all cases ■ Not sure



Q) On abortion, which of the following statements best matches your opinion?

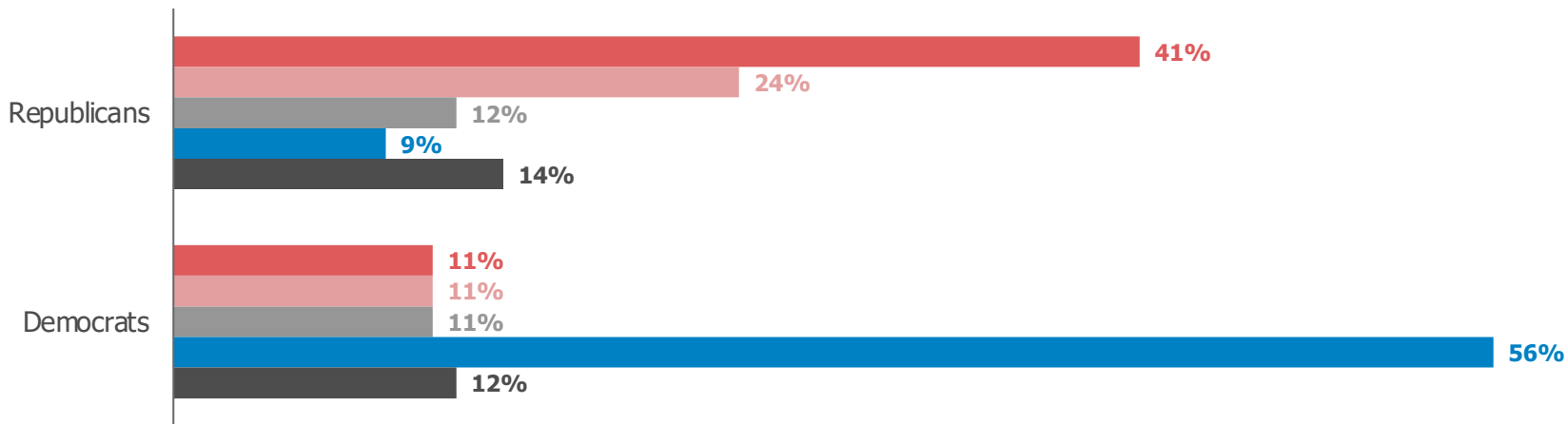
Subgroups: Independents (n=369), Democrats (n=506), Republicans (n=563)

[†] Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

The problem: Voters don't know exactly what the parties want to do. This is especially unclear for the post-Roe Republican Party.

What would _____ do if they win in the 2024?

- Attempt to ban abortion altogether
- Only attempt to restrict abortion to an early point, such as 6 or 15 weeks
- Leave current abortion laws alone
- Attempt to increase abortion access
- Not sure



Q) Suppose Republicans win the 2024 election on the state and national level. What do you think they would do about abortion?

Q) Suppose Democrats win the 2024 election on the state and national level. What do you think they would do about abortion? (n=1438 likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding

Abortion Takeaways

- On balance, the pro-choice side is winning the argument in Arizona. But it's a closely divided state.
- The people who care most about the issue skew pro-choice.
- But normal voters aren't sure what the parties want to do. And, now that Roe is gone, the Republican Party doesn't have a clear, single message.

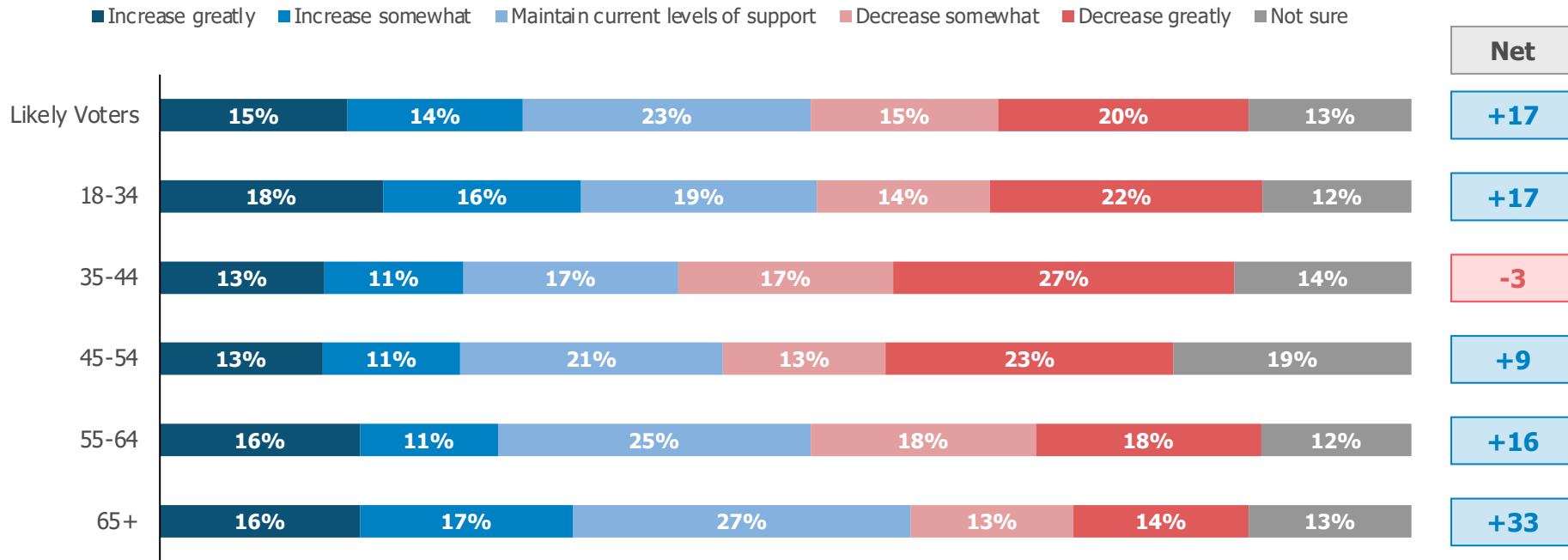
INSIGHT: In a post-Roe world, the GOP hasn't landed on a clear position. Dems are clearer – but some voters still don't know their stance.

A narrowly pro-choice state needs to know, specifically, where each candidate stands.

Foreign Policy Matters, Too!

Majority support increasing or maintaining aid to Israel. Some voters under 55 are skeptical – but the real standout data point is support among 65+.

Support for Israel

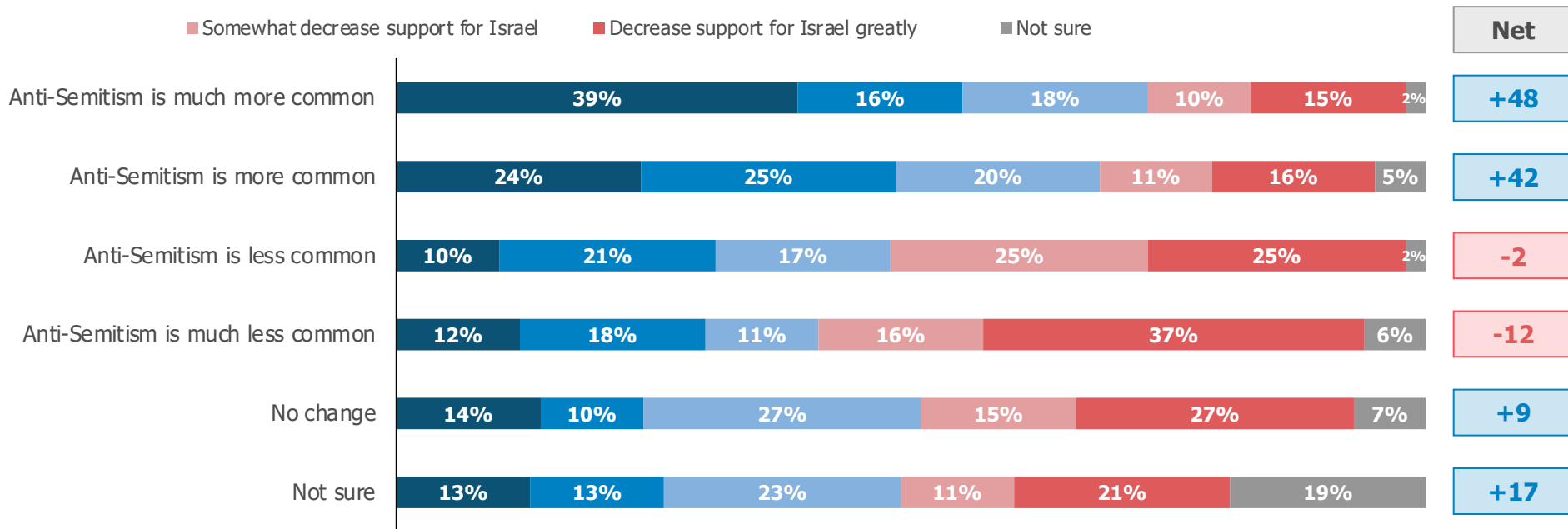


Q) In the conflict between Israel and Palestine, should the United States government increase, decrease, or maintain its current level of support for Israel? (n=1438 Likely voters)
 Subgroups: 18-34 year olds (n=213), 35-44 year olds (n=215), 45-54 year olds (n=235), 55-64 year olds (n=277), 65+ year olds (n=498)
 † Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

And these issues hit home – those who see antisemitism are more likely to support Israel

Perceived Anti-Semitism by Support for Israel

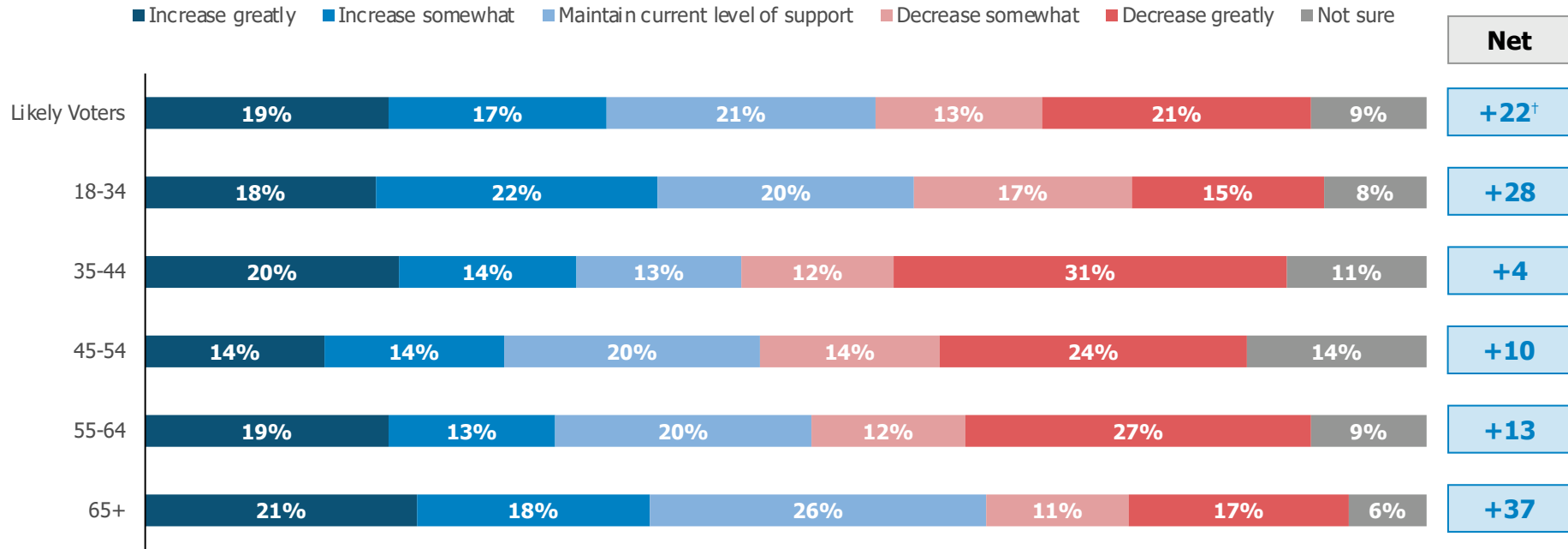
■ Increase support for Israel greatly
 ■ Somewhat increase support for Israel
 ■ Maintain current levels of support for Israel
■ Somewhat decrease support for Israel
 ■ Decrease support for Israel greatly
 ■ Not sure



In recent years, has antisemitism - that is, prejudice against Jewish people - become more or less common in Arizona? In the conflict between Israel and Palestine, should the United States government increase, decrease, or maintain its current level of support for Israel? Total Likely Voter Sample (N=1306); Subgroups (Support for Israel): Increase greatly (N=196), Increase somewhat (N=204), Decrease somewhat (N=198), Decrease greatly (N=238). Maintain current support (N=300), Not sure (N=170). † Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Support is even stronger for Ukraine with a similar trend among the different age groups

Support for Ukraine



Q) In the conflict between Ukraine and Russia, should the United States government increase, decrease, or maintain its current level of support for Ukraine?
 (n=1438 Likely voters)

Subgroups: 18-34 year olds (n=213), 35-44 year olds (n=215), 45-54 year olds (n=235), 55-64 year olds (n=277), 65+ year olds (n=498)

[†] Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Key Takeaways: Foreign Policy

- The big picture context: Americans back either maintaining or increasing funds to Israel and Ukraine.
- There's some age gradient – older voters favor the U.S.'s traditional allies, and young voters may be a shade more skeptical

There's a worthwhile debate to be had about how much the U.S. should be involved in either war. There is an anti-Israel and anti-Ukraine minority.

But both countries have majority support – helpful framing for this issue.



Overall Takeaways: The Top Issues

- On the economy – everyone wants to know how inflation will be solved because it is the KEY problem.
- On the border – Arizona is in a pro-restriction mood. Candidates must explain how they're going to solve the border crisis and address immigration generally.
- On abortion – the GOP must clarify their stance in the post-Roe era. Majority pro-choice with dissent.

INSIGHT: Possible to craft:

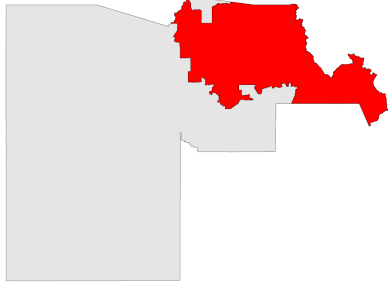
- Border questions that get deep on legal vs illegal immigration plus security
- Abortion questions that clarify GOP stances
- Inflation questions that challenge all
- AND give voters the info they need to know

Where to find people

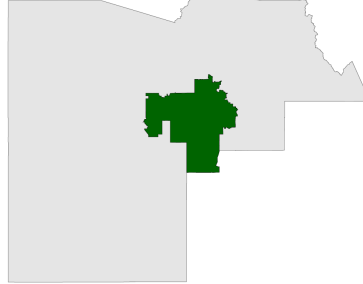
Region and Medium

First – let's look at which communities care about which issues

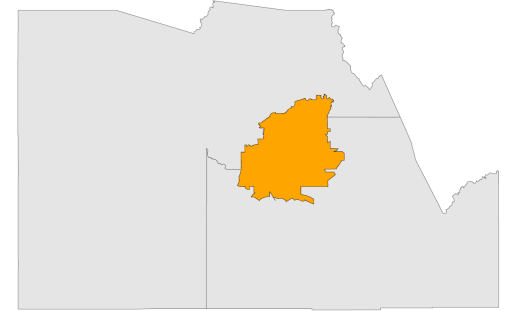
North Phoenix & Scottsdale



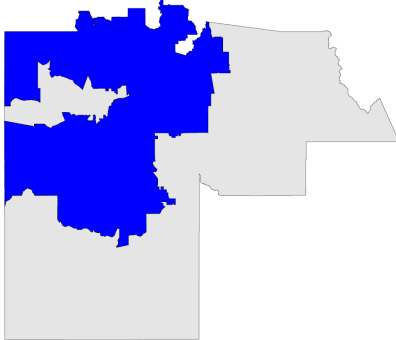
South Phoenix & Tempe



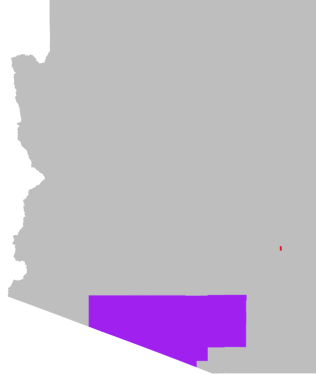
East Valley



West Valley



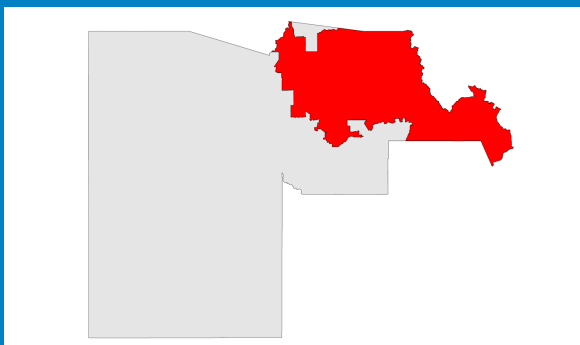
Pima/Tucson



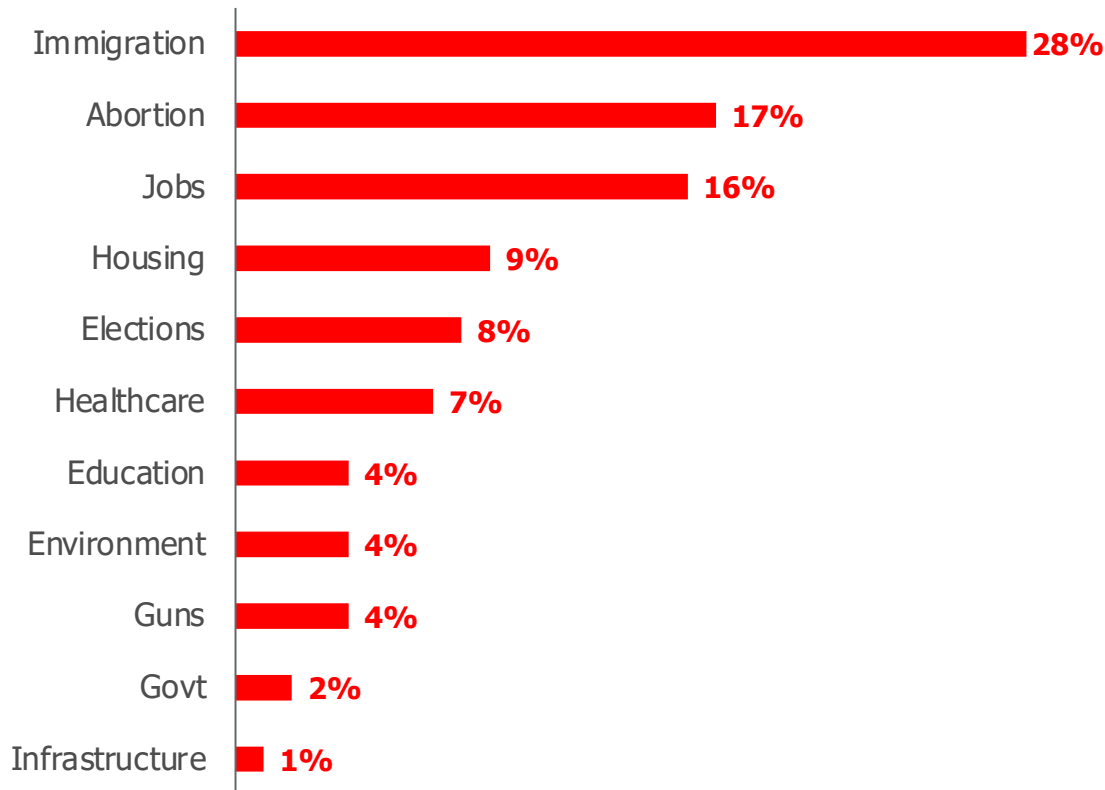
Rural Arizona



Regional Analysis: North Phoenix & Scottsdale



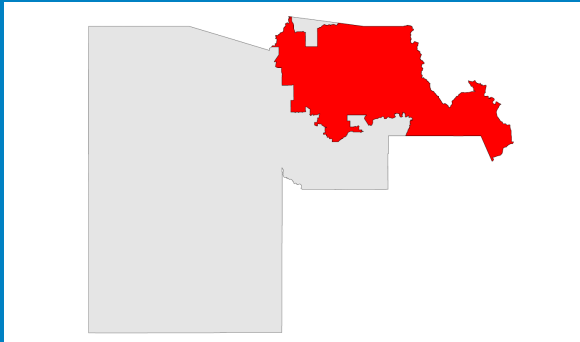
Top Issue (Select One) (among North Phoenix & Scottsdale Voters)



Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=190 North Phoenix Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: North Phoenix & Scottsdale

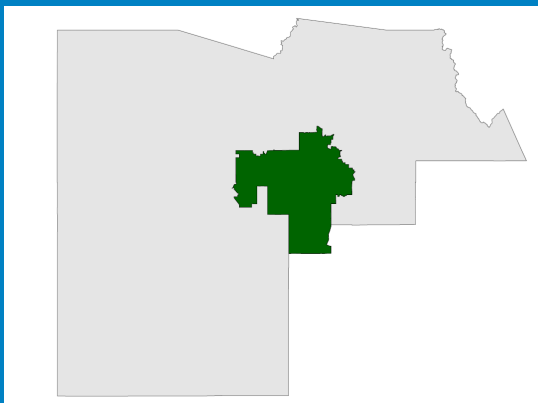


Top 3 Needed Topics (2024)		Top 3 Needed Topics (2023)	Top 3 Needed Topics (2022)*
Immigration (Border security)		Abortion (Whether the candidate calls themselves pro-life or pro-choice & laws regarding abortion access)	Jobs/Economy (Gas prices)
Jobs/Economy (Inflation/rising prices)		Immigration (Border security)	Immigration (Border security)
Housing (Affordable housing)	Abortion (Laws regarding abortion access)	Jobs and Economy (Gas prices)	Healthcare (Affordability of prescription drugs)

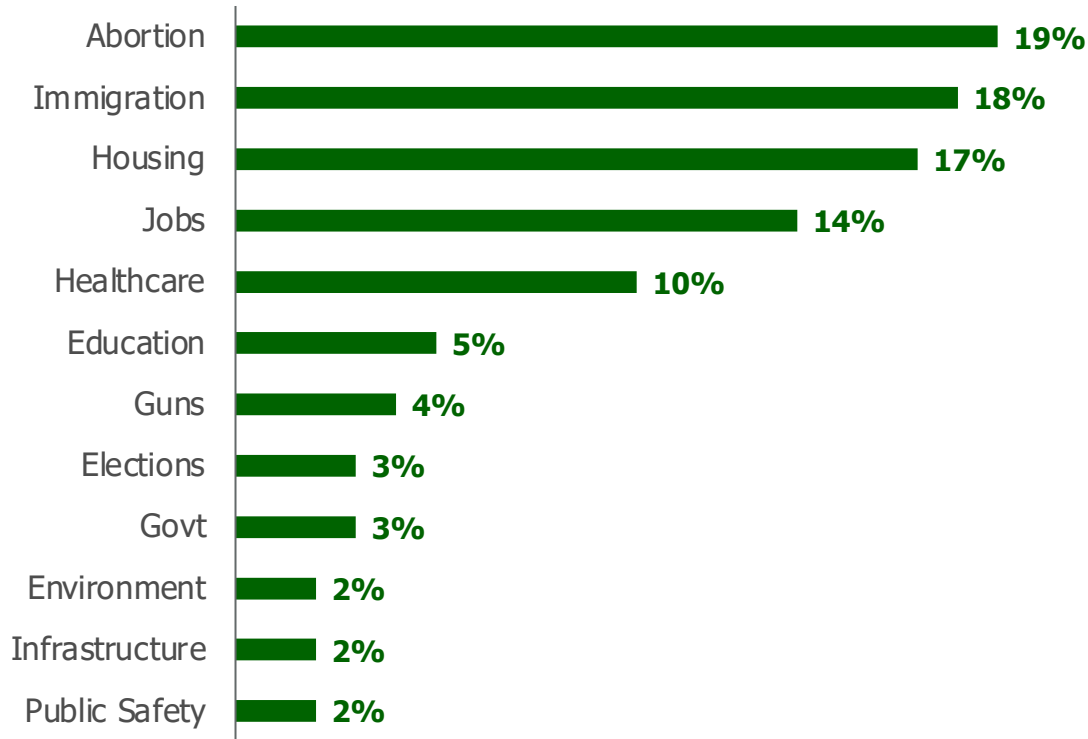
Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=190 North Phoenix Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: South Phoenix & Tempe



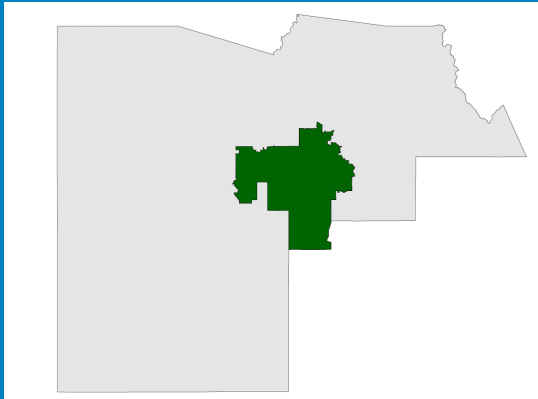
Top Issue (Select One) (among South Phoenix & Tempe Voters)



Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=255 South Phoenix Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: South Phoenix & Tempe

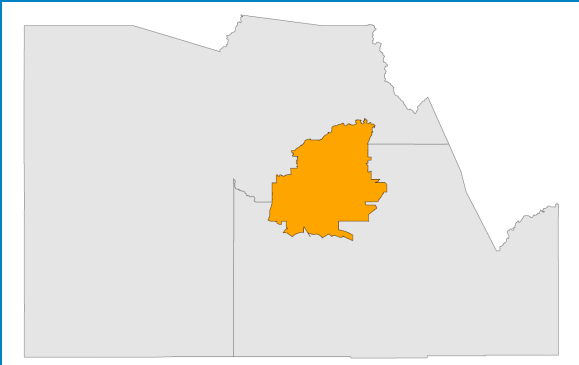


Top 3 Needed Topics (2024)	Top 3 Needed Topics (2023)	Top 3 Needed Topics (2022)*
Housing (Affordable housing)	Jobs and Economy (Minimum wage)	Jobs and Economy (Gas prices)
Abortion (Laws regarding abortion access)	Abortion (Laws regarding abortion access)	Healthcare (Affordability of prescription drugs)
Immigration (Border security)	Education (Teacher pay)	Education (Funding for supplies/technology)

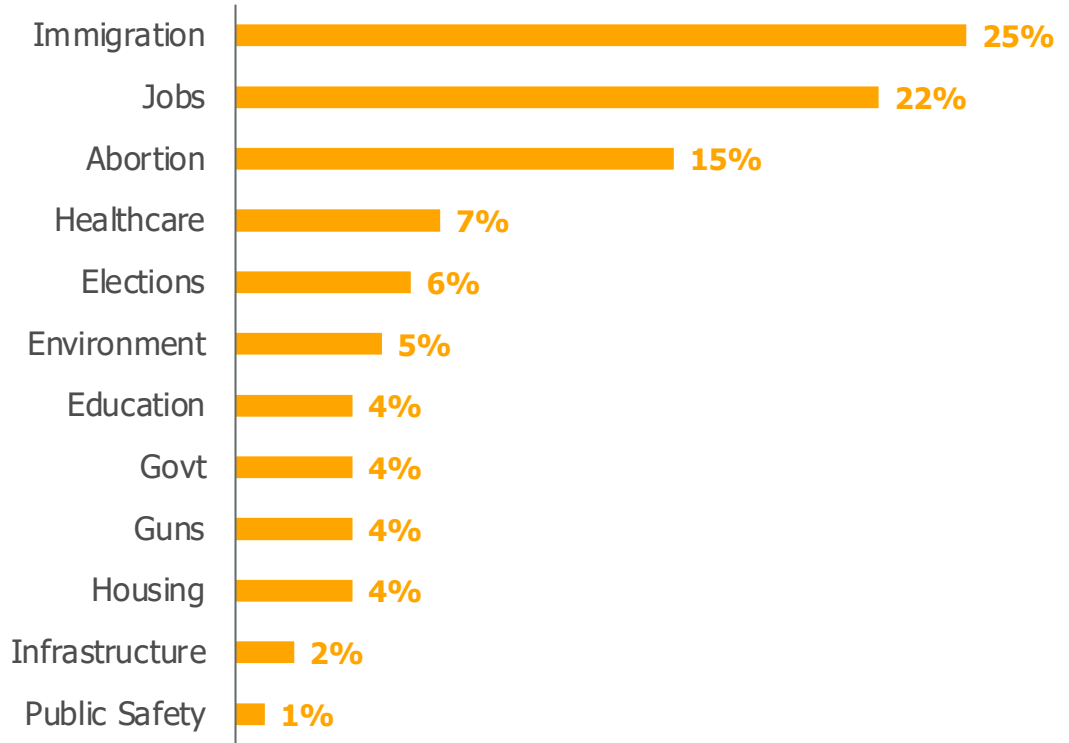
Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=255 South Phoenix Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: East Valley



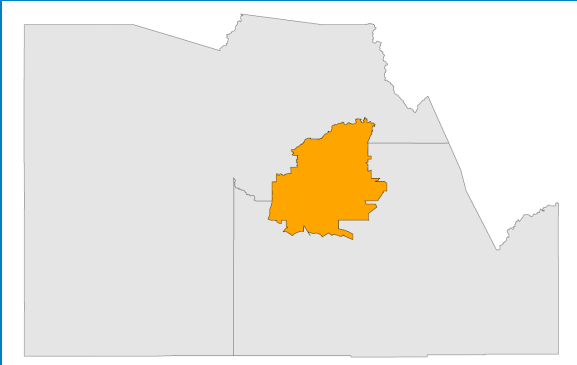
Top Issue (Select One) (among East Valley Voters)



Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=255 Southeast Phoenix Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: East Valley

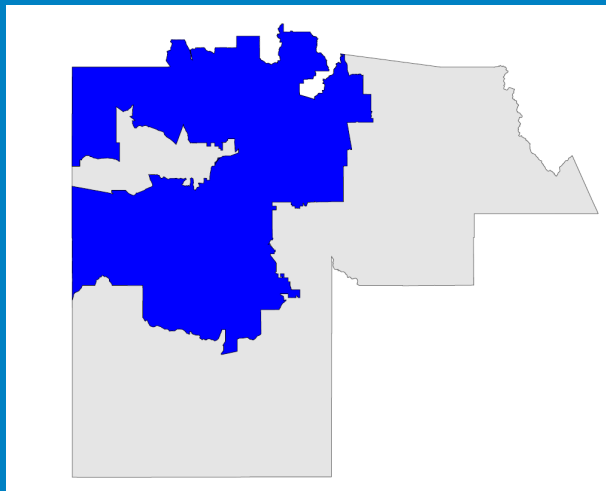


Top 3 Needed Topics (2024)	Top 3 Needed Topics (2023)	Top 3 Needed Topics (2022)*
Immigration (Border security)	Immigration (Border security)	Jobs and Economy (Gas prices)
Jobs/Economy (Inflation/rising prices)	Abortion (Whether the candidate calls themselves pro-life or pro-choice)	Education (Teacher pay)
Abortion (Laws regarding abortion access)	Jobs and Economy (Gas prices)	Healthcare (Affordability of prescription drugs)

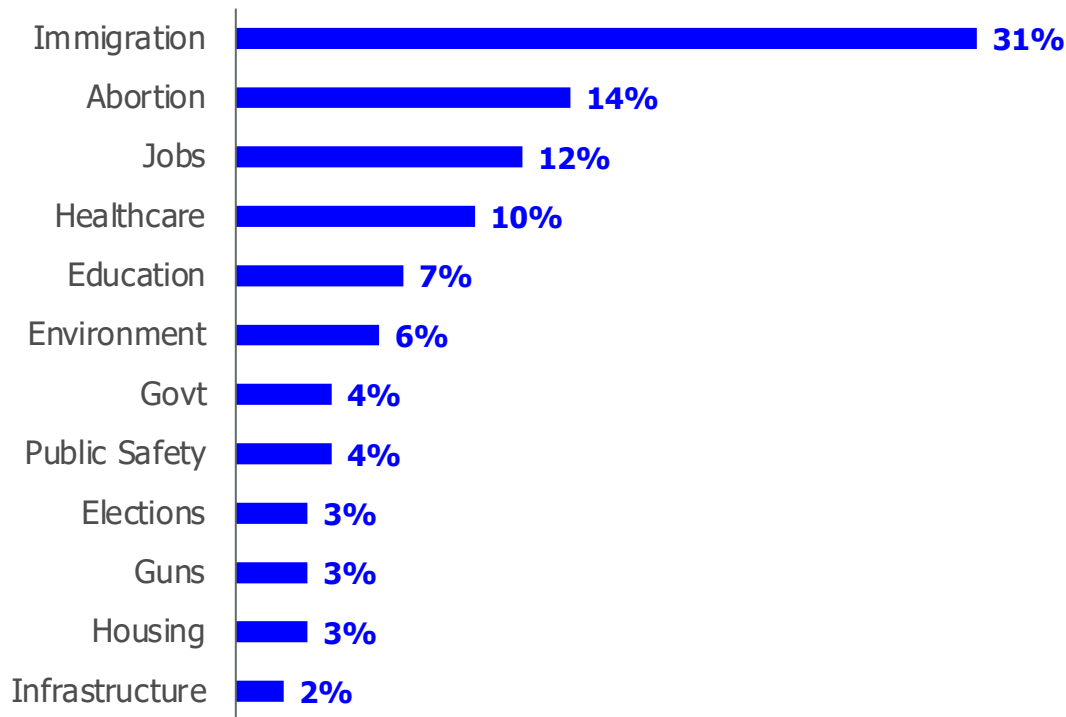
Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=255 Southeast Phoenix Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: West Valley



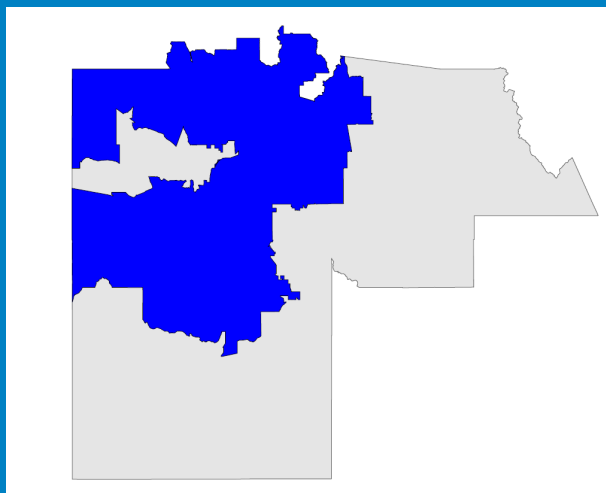
Top Issue (Select One) *(among West Valley Voters)*



Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=160 West Valley Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: West Valley

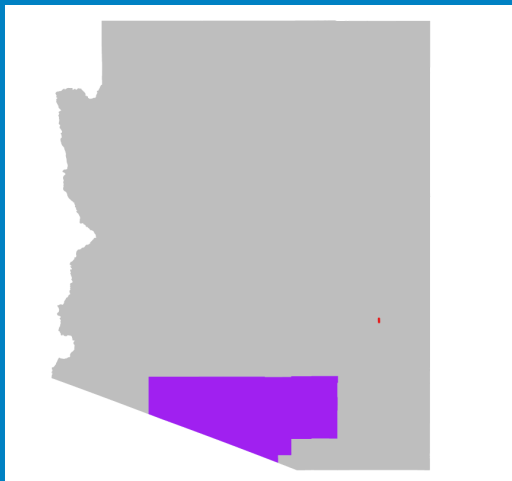


Top 3 Needed Topics (2024)	Top 3 Needed Topics (2023)	Top 3 Needed Topics (2022)*
Immigration (Border security)	Immigration (Border security)	Jobs and Economy (Gas prices)
Abortion (Laws regarding abortion access)	Abortion (Whether the candidate calls themselves pro-life or pro-choice)	Healthcare (Affordability of prescription drugs)
Jobs/Economy (Inflation/rising prices)	Jobs and Economy (Taxes)	Education (Teacher pay)

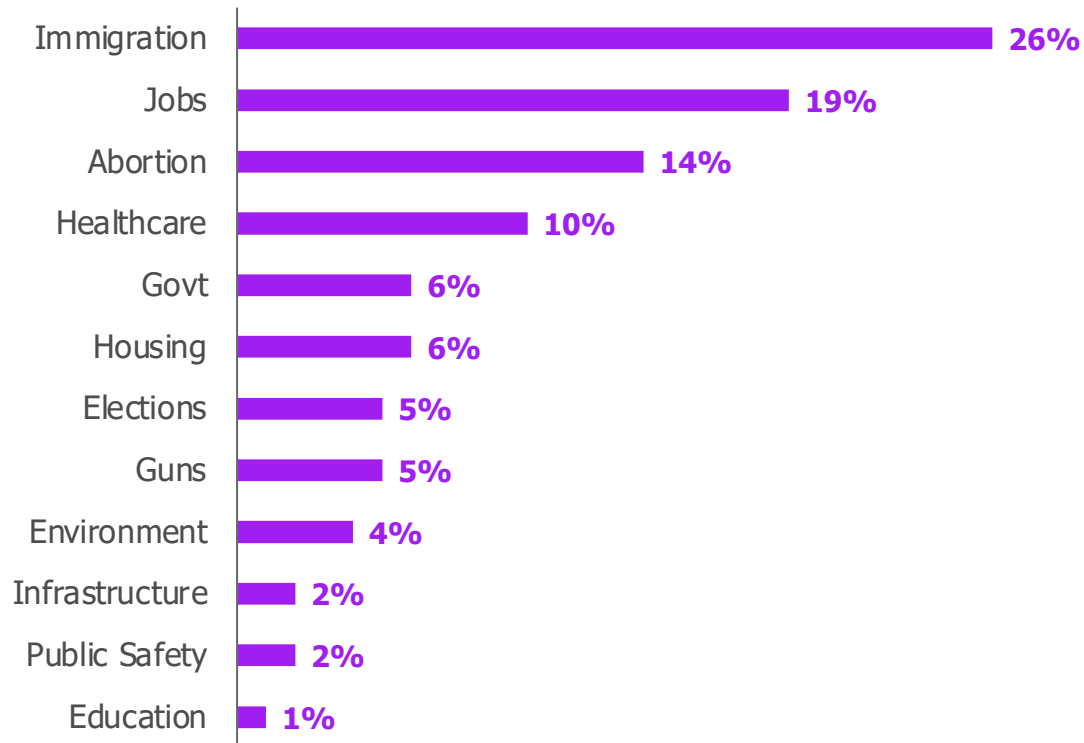
Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=160 West Valley Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: Pima/Tucson



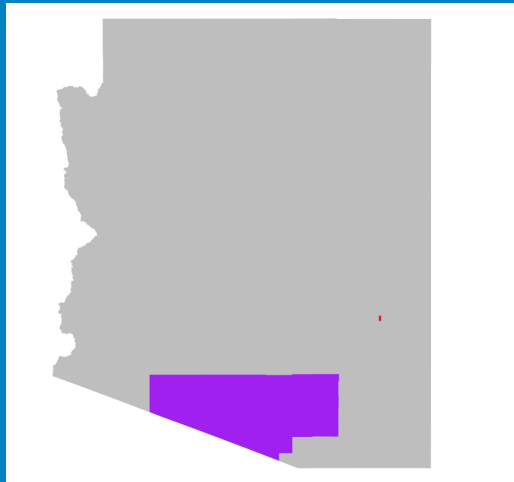
Top Issue (Select One) (among Tucson-Pima Voters)



Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=269 Tucson-Pima Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: Pima/Tucson



Top 3 Needed Topics (2024)	Top 3 Needed Topics (2023)	Top 3 Needed Topics (2022)*
Immigration (Border security)	Abortion (Laws regarding abortion access)	Jobs and Economy (Gas prices)
Jobs/Economy (Inflation/rising prices)	Immigration (Border security)	Healthcare (Affordability of prescription drugs)
Abortion (Laws regarding abortion access)	Jobs and Economy (Unemployment, taxes, minimum wage, gas prices)	Education (Teacher pay)

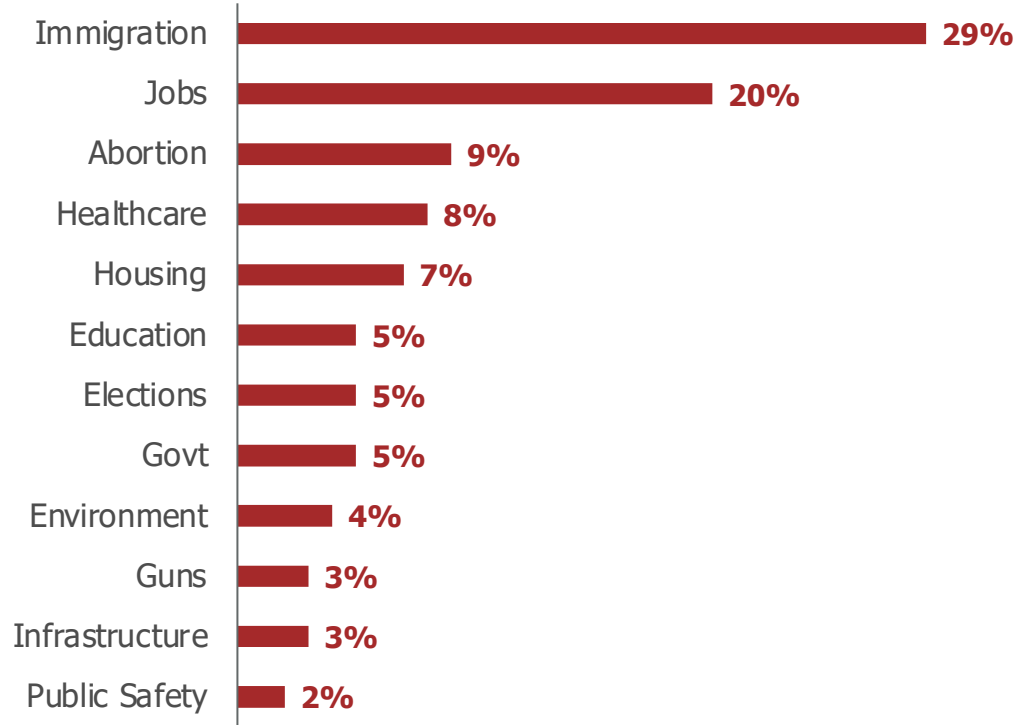
Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=269 Tucson-Pima Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: Rural



Top Issue (Select One) *(among Rural Voters)*



Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=309 Rural Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Regional Analysis: Rural



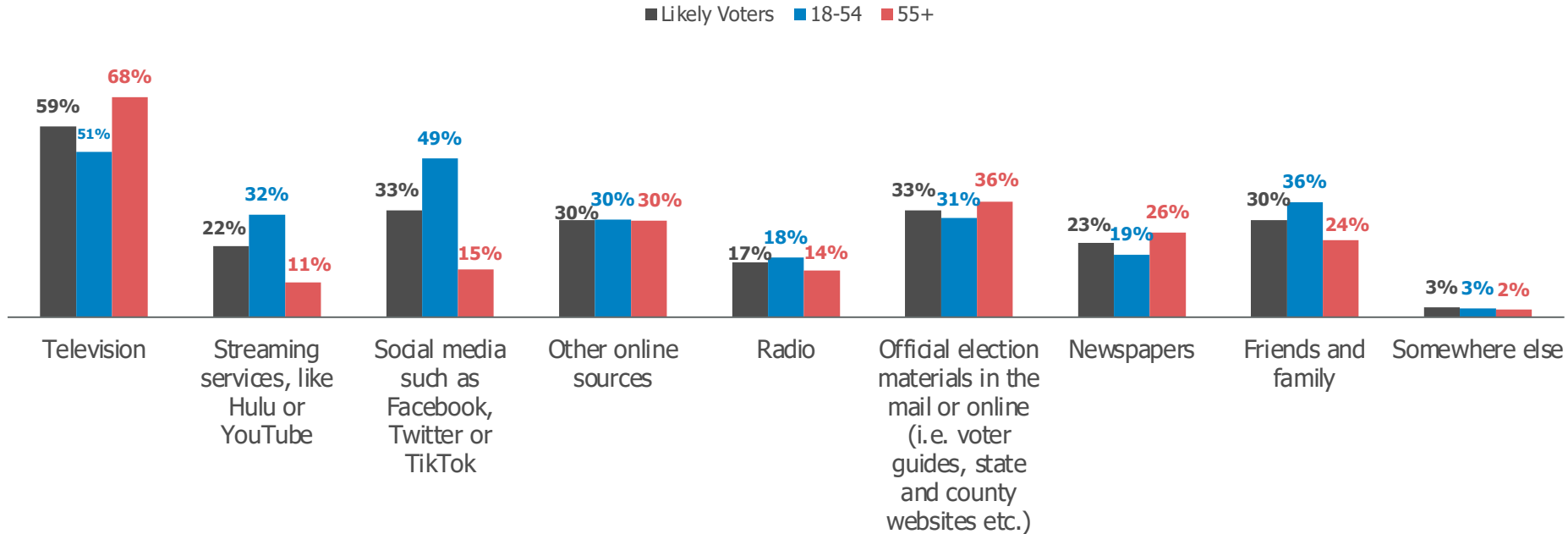
Top 3 Needed Topics (2024)	Top 3 Needed Topics (2023)	Top 3 Needed Topics (2022)*
Immigration (Border security)	Abortion (Whether the candidate calls themselves pro-life or pro-choice)	Jobs and Economy (Gas prices)
Jobs/Economy (Inflation/rising prices)	Immigration (Border security)	Healthcare (Affordability of prescription drugs)
Abortion (Laws regarding abortion access)	Jobs and Economy (Gas prices)	Immigration (Border security)

Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=309 Rural Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

And where should we find them? TV for all, social media for the young.

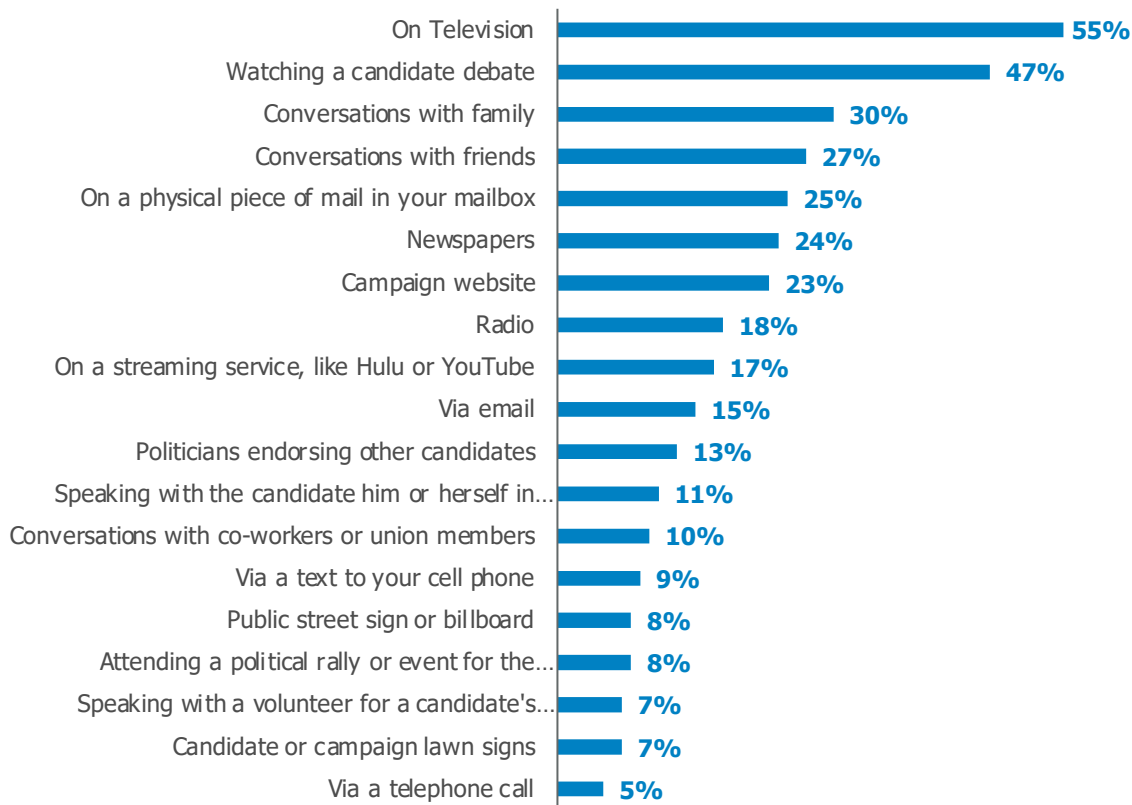
Primary Sources of Election Information



People tend to view politics from a distance – TV and speeches reach people more than individual volunteers.

- Campaigns' primary means of reaching likely voters is through television and debate.
- Like previous surveys found, likely voters' third and fourth most common way of finding out about campaigns is through conversation with those around them.

Campaigns' Contact with Likely Voters



Q) Below is a list of various ways campaigns can communicate with voters. Please indicate which of the methods you most often use to learn about candidates. (n=1438 Likely voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Key Takeaways

- In more rural areas – and at the border – immigration is a top concern.
- In dense areas, the economy and abortion are higher in the “most important issue” rankings.
- TV is king for the overall population – best way to reach people.
- For young voters, social media matters more.

INSIGHT:

- **Politics is a TV sport – be there, and be on social media.**
- **Tailor the debates for your region – debate border in rural and border areas, culture in the city, and economics everywhere.**



Key Takeaways & Actionable Insights

- Arizonans are in the mood for change: ready to hear solutions, interested in politics.
- Governing style matters. Candidates **MUST** say how they'd balance compromise **AND** stand firm.
- The big three – abortion, immigration, economics – are still the big three.

BUT voters need clarity on:

- Exact abortion positions for both sides, especially the GOP
- How Arizona politicians will **ACT** on immigration
- How inflation will be **SOLVED** at **ALL** levels

- They're expecting to hear from candidates, news media via TV (all types – not just cable!), and social media.

Methodology

Research Methodology

This poll was conducted by Noble Predictive Insights from March 12-20, 2024 and surveyed Arizona registered voters via opt-in online panel and text-to-online SMS message in English and Spanish. The sample included 1,634 registered voters, 1,438 likely general election voters, and 1,306 likely primary voters (determined via screening questions). The sample demographics were weighted to accurately reflect the registered voter population by gender, region, age, party affiliation, race/ethnicity, and education according to recent voter file data, the Arizona Secretary of State's Office, and recent Census data. The margin of error was +/- 2.7% for likely primary election voters, +/- 2.6% for likely general election voters and +/- 2.4% for registered voters.

*Numbers may not total 100%, due to rounding.

Registered voter data is shown here. Likely voter data – primary and general – is in the poll report sample summary.

Education	
High School or Less	30%
Some College	38%
College Graduate	20%
Post-Graduate	12%

Region	
Maricopa	60%
Pima	15%
Rural	25%

Party Affiliation	
Democrat	30%
Independent	36%
Republican	34%

Ethnicity Combined	
White, non-Hispanic	62%
Hispanic/Latino	23%
Other	15%

Gender	
Male	47%
Female	53%

Age	
18-34	27%
35-44	14%
45-54	16%
55-64	16%
65+	27%