



**NOBLE**  
PREDICTIVE INSIGHTS

# **AZ Citizens Clean Elections Commission Public Opinion Survey Results**

August 2024

# Topics

- ❖ State of the State
- ❖ The Issues that Matter Most
- ❖ Shifts in Voter Focus
- ❖ Upcoming Policy Proposals and Cheat Sheets
- ❖ Consistency in Voter Preferences

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

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## Discover

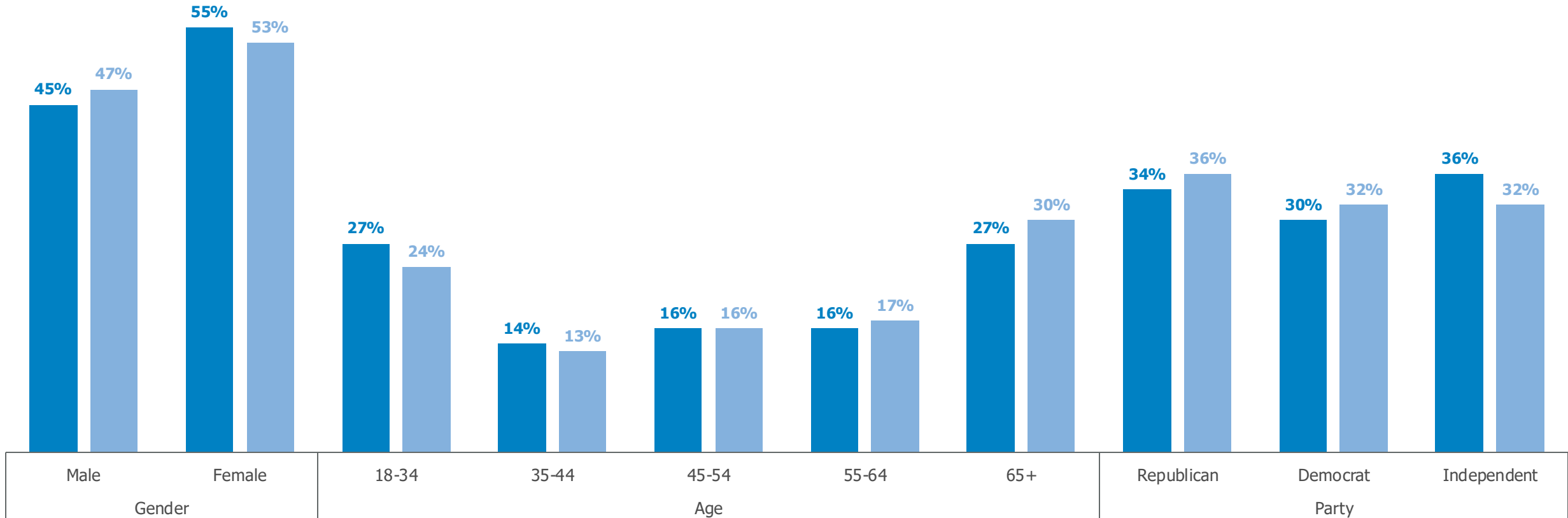
- Look into broad issue categories and granular, smaller issues that matter to Arizonans
- Drill deep on three key issues driving the conversation – economics, immigration, and abortion
- Provide actionable, strategic recommendations for voter education and debate discussions

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**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=1640 registered voters)

Subgroup: Likely general election voters (n=1481)

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

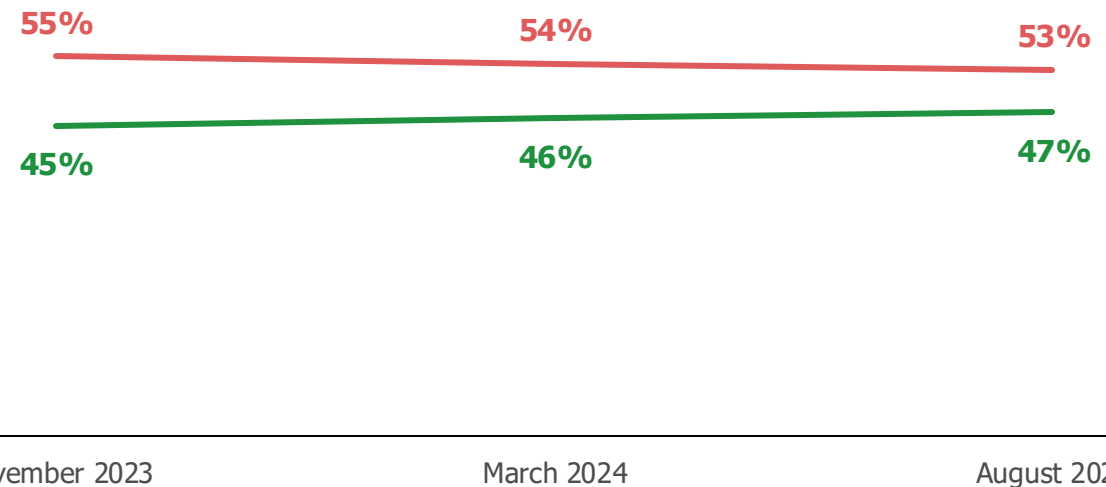
# **The State of the State**

# Arizona voters still believe the state is headed in the wrong direction

- Republicans (69%) are especially concerned with the condition of the state – key members of their base are particularly unhappy:
  - Conservatives (72%)
  - Those who live in a rural area (62%)

## Arizona is...

— On the right track — Going in the wrong direction



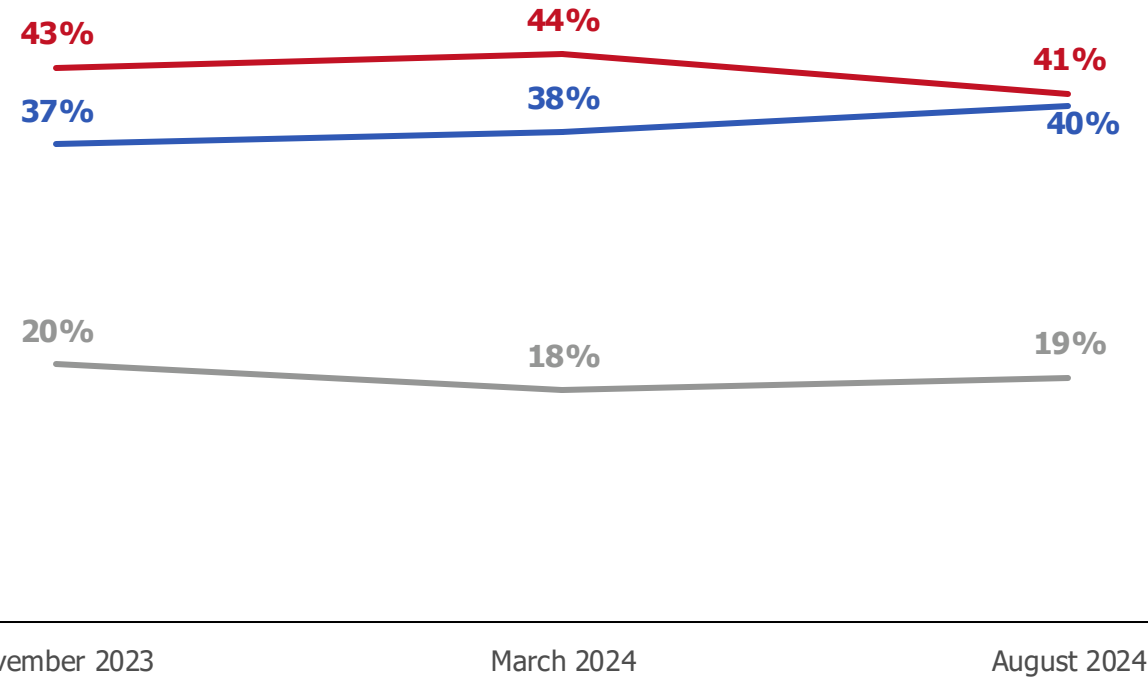
Q) Do you believe that Arizona is on the right track or heading in the wrong direction? (n=1640 registered voters)

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But, despite the overall dissatisfaction with the state, support for Democratic control of the state is increasing.

## Preferred Party to Run the State

— Republicans — Democrats — Neither



Q) When it comes to running the state of Arizona, which political party do you believe would do a better job, in general? (n=1640 registered voters)  
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

**What do Arizonans care about?**



# 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

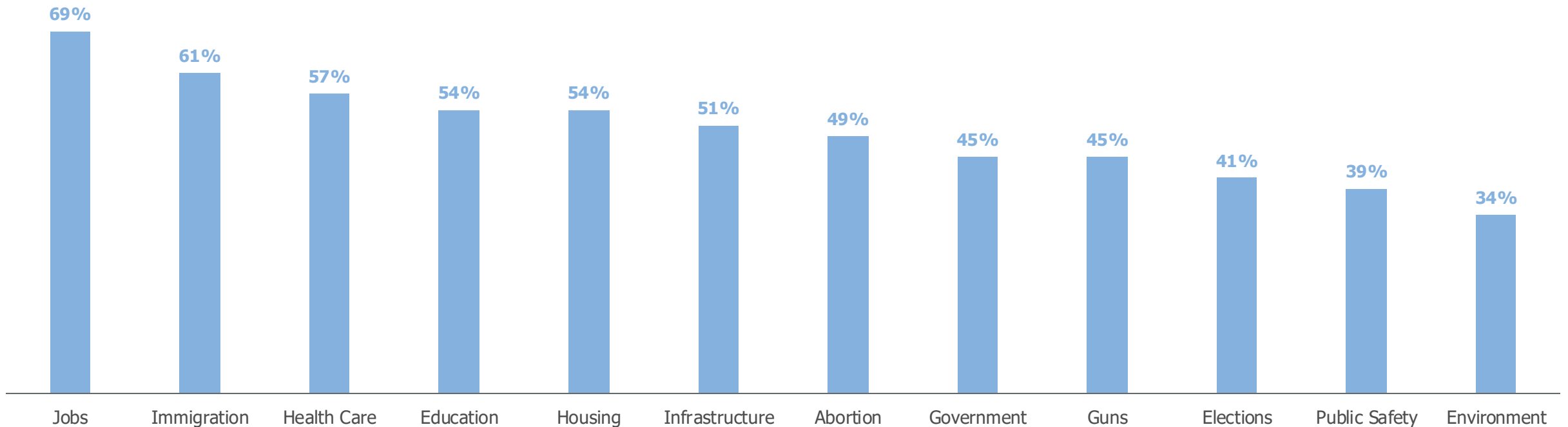
Public Safety

Immigration

# When asked to select any, issues with Jobs/Economy, Immigration, and Healthcare are at the forefront of Arizonans' minds.

## Top Issues Influencing Vote Choice (Select all)

■ Registered Voters

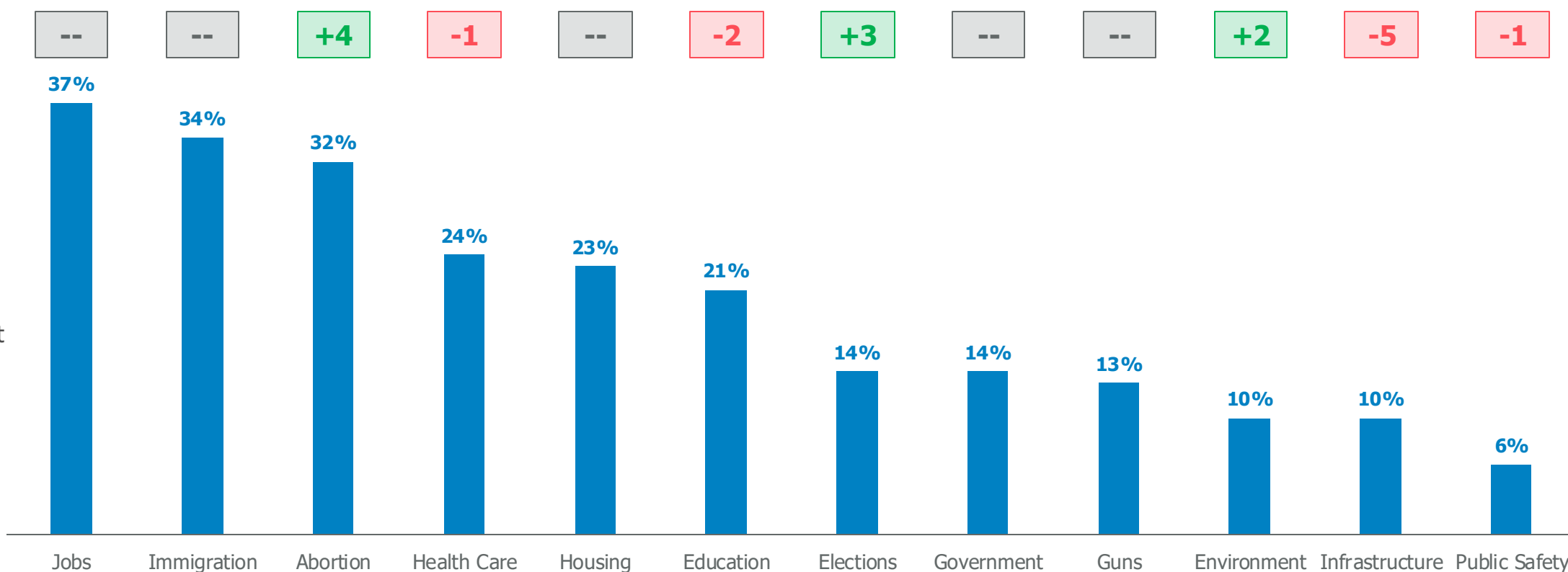


# But when asked to identify their top three issues, abortion climbs four spots, cementing itself in the top three.

## Top 3 Issues Influencing Vote Choice (Select 3)

■ Registered Voters

Rank Change from "Select All"



Topics falling in rank when voters had to narrow their focus to three issues signifies that although voters may care about the issue, it tends to be at a lower level of importance.

Topics rising in rank tend to be front-of-mind issues.



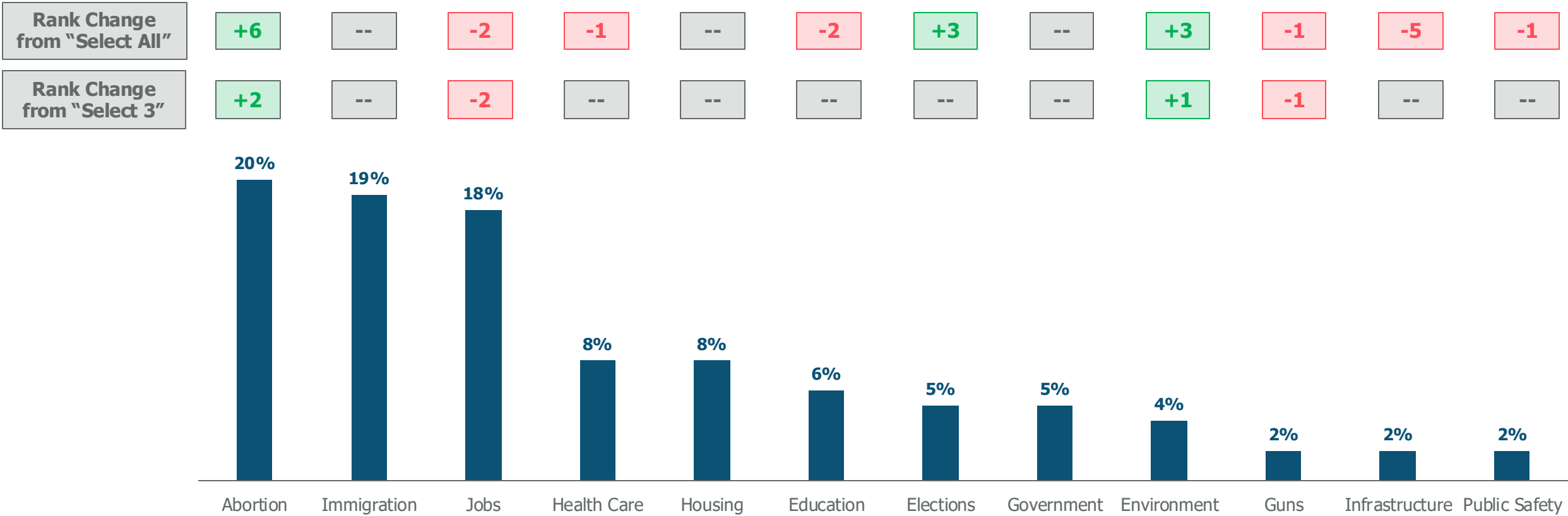
Q) Of the issues you chose in the last question, which are the three most important for you to know a candidate's position when you are deciding how you will vote? (n=1640 Registered voters)

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# And when asked about their TOP issue, 57% of people selected Abortion, Immigration, or Jobs/Economy.

## Top Issues Influencing Vote Choice (Select 1)

■ Registered 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=1640 Registered voters)

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

**A lot of voters care about affordable housing (Housing), but when they had to narrow it down, laws regarding abortion access (Abortion) overtook it.**

**Border security (Immigration) and inflation/rising prices (Jobs/Economy) were consistently near the top.**

<b>Top Issue (Select All)</b>	<b>Top Issue (Select 3)</b>	<b>Top Issue (Select 1)</b>
Affordable Housing (47%)	Border Security (27%)	Border Security (15%)
Border Security (46%)	Laws regarding abortion access (21%)	Laws regarding abortion access (13%)
Inflation/Rising Prices (45%)	Inflation/Rising Prices (20%)	Inflation/Rising Prices (11%)

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?

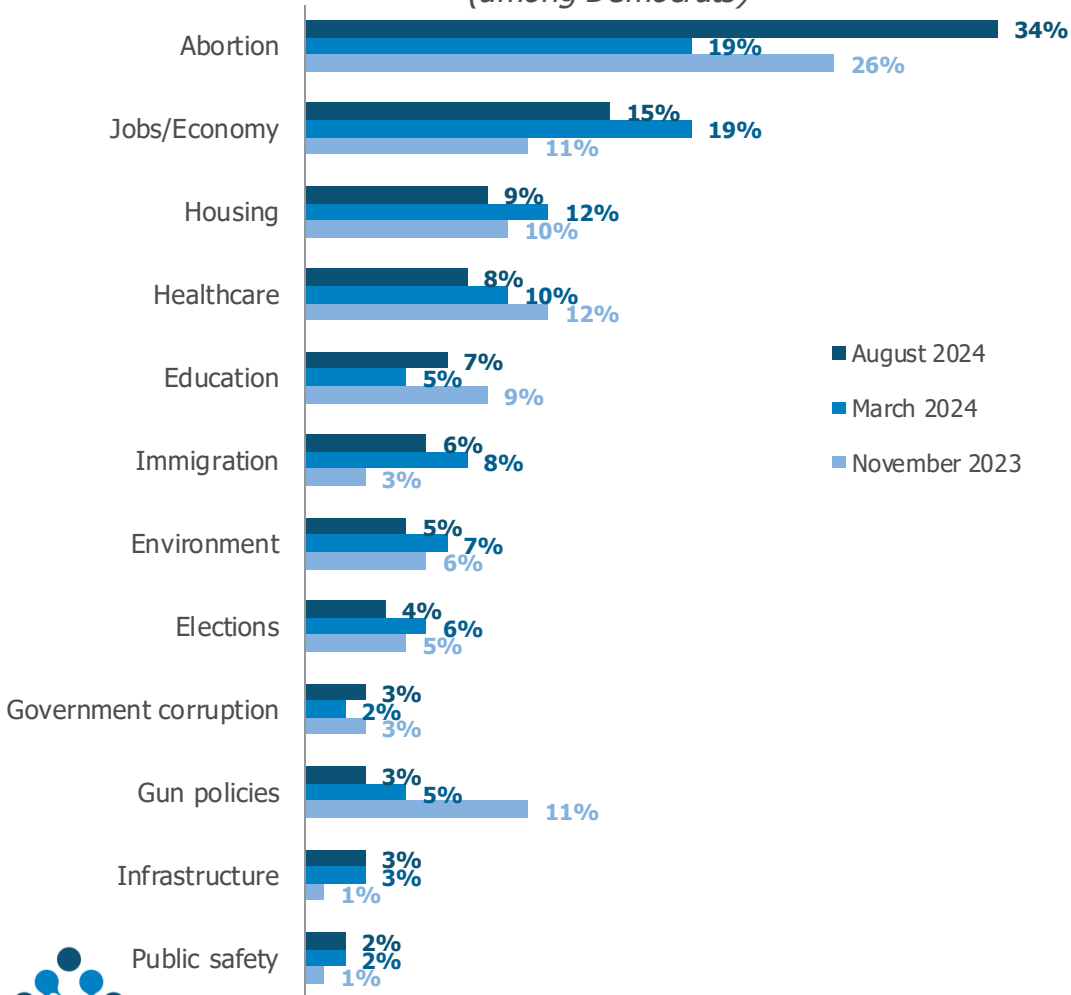
Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=1640 Registered voters)

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# Abortion's influence on the democratic vote choice has only gotten stronger over the duration of this campaign season.

## Issues Influencing Vote Choice

(among Democrats)



"I'm not okay with a minority using their religious beliefs **to restrict** half of the population's healthcare and **reproductive choices**. If they don't like abortions, they shouldn't get them."

- White, Yavapai County, age 55-64

"**Inflation is killing the American dream** of being able to provide for one's family."

- Non-White, non-Hispanic, Maricopa County, age 65+

"Arizona is one of the hottest states in this country in addition to having one of the largest homeless populations, and **housing is necessary for survival**. Making sure it's affordable shouldn't have to be debated, nor should affordable healthcare access to safe medical resources. These things should be a priority for everyone, especially those in power for improving these systems for BIPOC citizens."

- White, Maricopa County, age 18-34

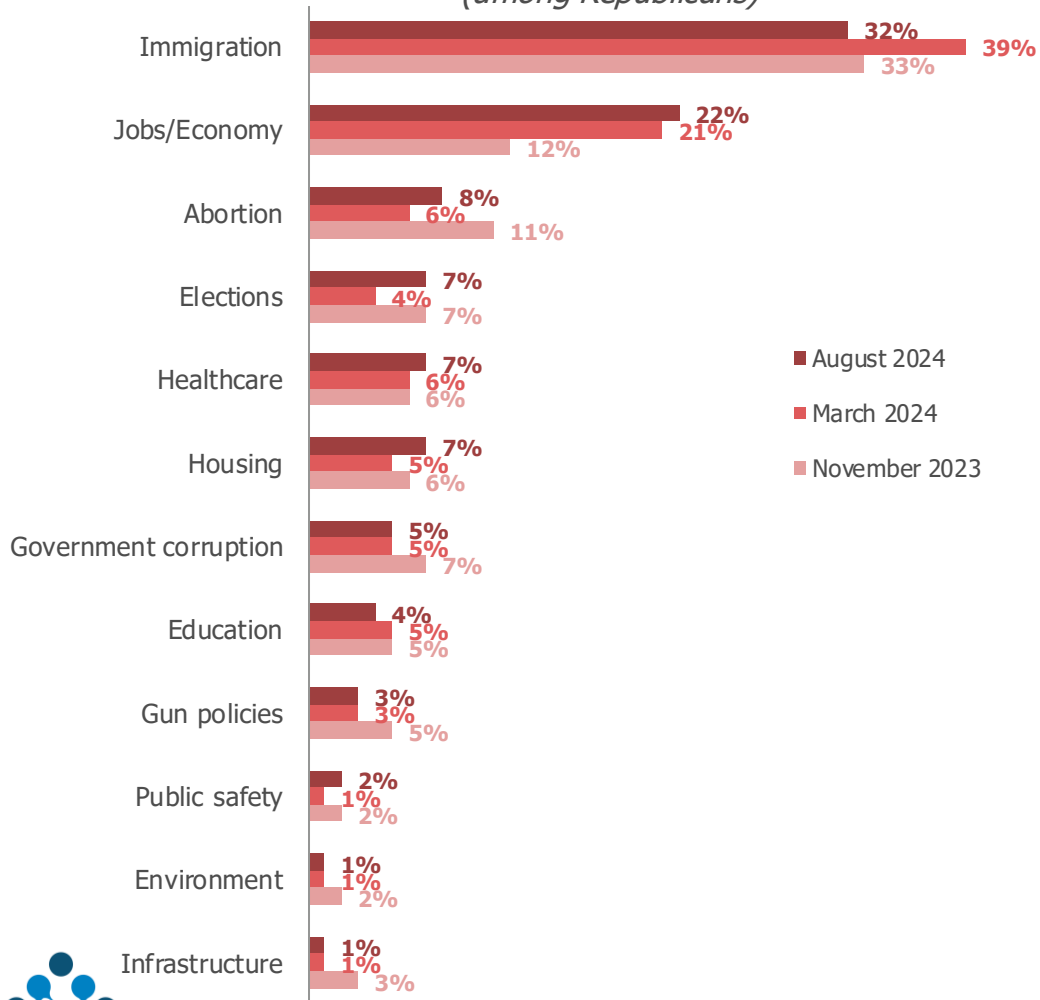
Q) Finally, which is the most important issue for you to know a candidate's position when you are deciding how you will vote? (n=564 Democrats)

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# Immigration and Jobs/Economy continue to influence the vote choice of Republicans.

## Issues Influencing Vote Choice

(among Republicans)



“The borders need to be closed, and **immigrants must be made to go through the proper channels to enter our country**. We are letting in too many people, and we’re giving them our jobs and our healthcare despite them not being citizens.”

- White, Mohave County, age 55-64

“**Inflation is really hurting Arizona residents**. People are falling into homelessness because they can’t afford rent!”

- White, Maricopa County, age 45-54

“**Abortion should be decided by each state**. It is not a federal issue. I don’t think abortion should be allowed after the second trimester and I have a real issue with my tax dollars paying for anyone’s abortion. Be responsible for your own decisions!”

- White, Maricopa County, age 55-64

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=593 Republicans)

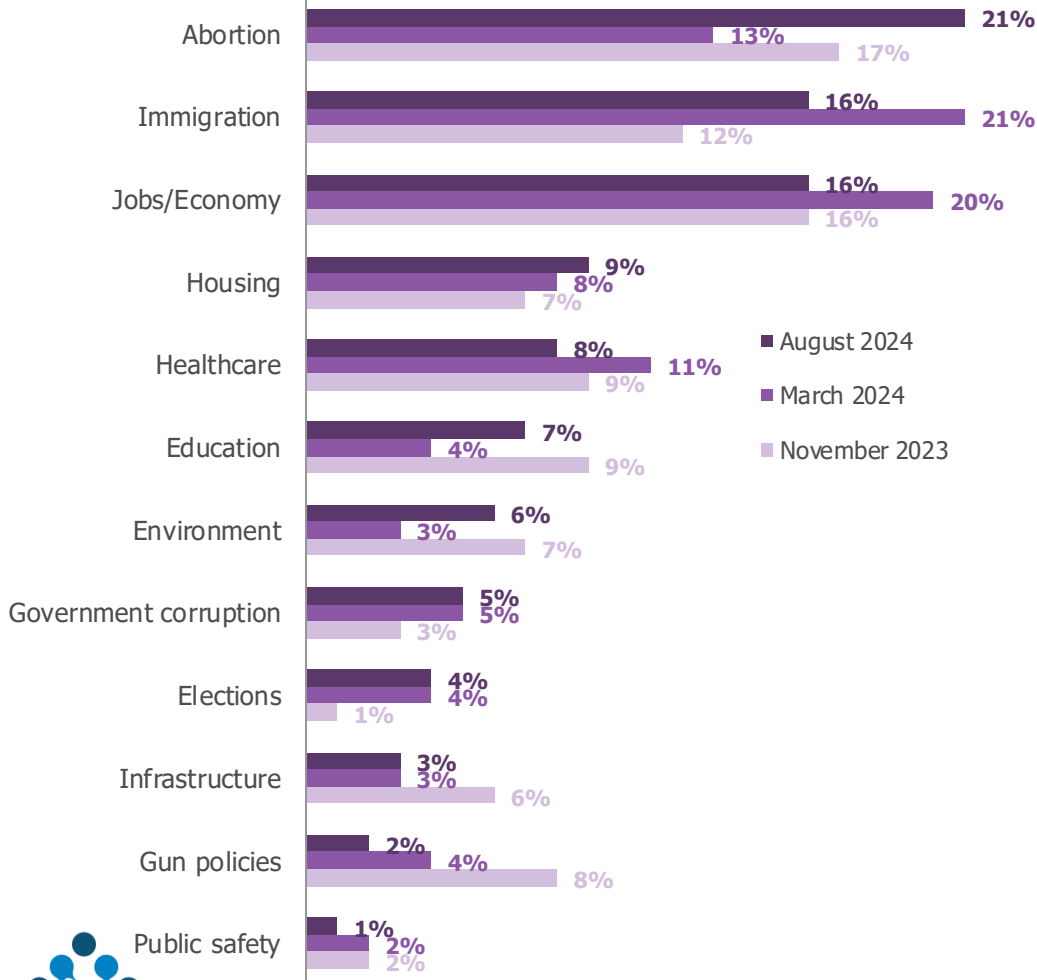
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# Partisan preferences persuade Independents – their top issues encapsulate Democratic and Republican priorities.

## Issues Influencing Vote Choice

(among Independents)



“**Arizona is flooded with illegal immigration.** It affects all walks of life, from our classroom sizes and availability of teachers to the number of students per class. The high volume of traffic in illicit drugs in our schools and trafficking of innocent people are rampant in Arizona. We face criminal activities in different neighborhoods--especially in the low-income neighborhoods. Homeless issues have reached their highest levels in Phoenix and the surrounding cities. The state is overwhelmed.”  
*- Non-White, non-Hispanic, Maricopa County, age 55-64*

“**Abortion is healthcare,** and it affects every family. Denying access to abortion is a public health crisis.”  
*- White, Mohave County, age 18-34*

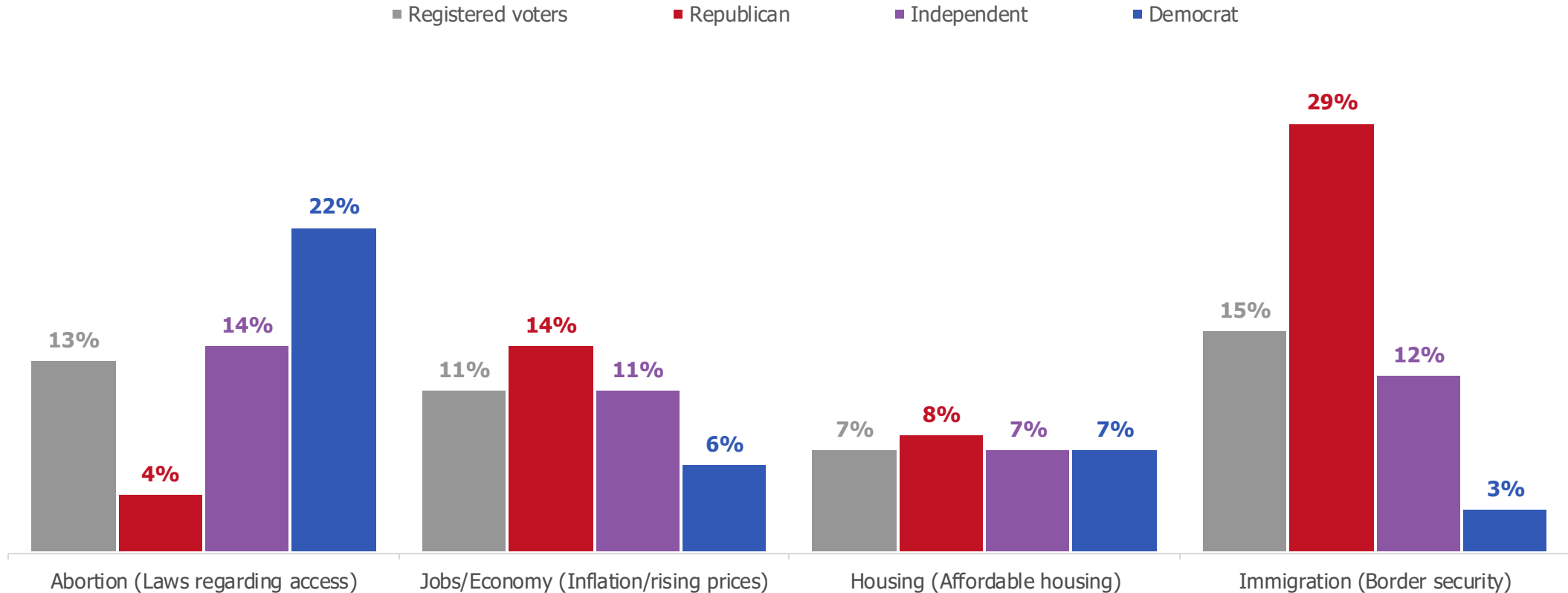
“All ships rise together. **Improving the economy helps everyone!**”  
*- White, Maricopa County, age 45-54*

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=483 Independents)

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

# Affordable housing (and Inflation/rising costs, to a lesser extent) demonstrate the common pain points that transcend party lines.

## Top Issue Driver by Party



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=1640 registered voters)

Subgroups: Independents (n=483), Democrats (n=564), Republicans (n=593)

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

“**Arizona won’t be a place where anyone can live if the water doesn’t flow** out clean or if we don’t have enough to supply this big state.”

*- Non-White, non-Hispanic, Maricopa County, age 18-34*

“Arizona **water is very important for the future of the state.**”

*- Hispanic, Maricopa County, age 18-34*

“**We need water to live!**”

*- Non-White, non-Hispanic, Maricopa County, age 35-44*

“We have **limited water and yet Arizona leaders are encouraging more people to move here.** The businesses are more concerned with money than the environment.”

*- White, Yavapai County, age 65+*

# 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. Although abortion has been on the rise, different voters care about each issue.**

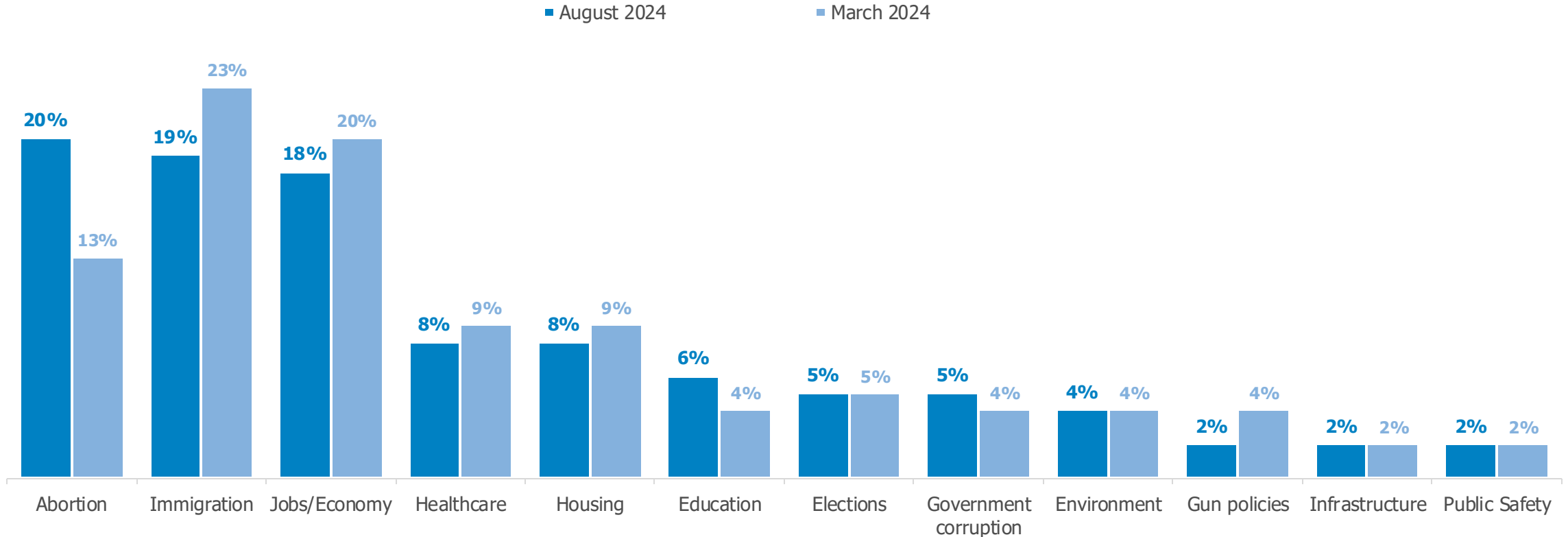
**The key: tailoring topics to the audience.**

# Shifts in Voter Focus

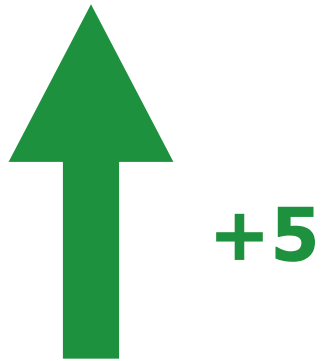
Change in issue ranking from March to August 2024

# Voters' focus has drifted from Immigration to Abortion over the last 5 months – remaining steady everywhere else.

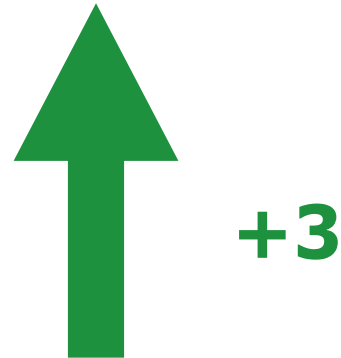
## Topics Influencing Vote Choice (Select One)



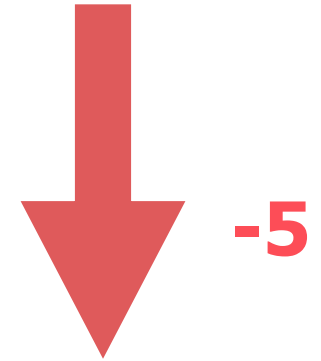
# Biggest Movers since March: Individual Issues



Abortion (Laws regarding abortion access)



Abortion (whether the candidate calls him/herself pro-life or pro-choice)



Immigration (Border Security)

# Ballot Propositions

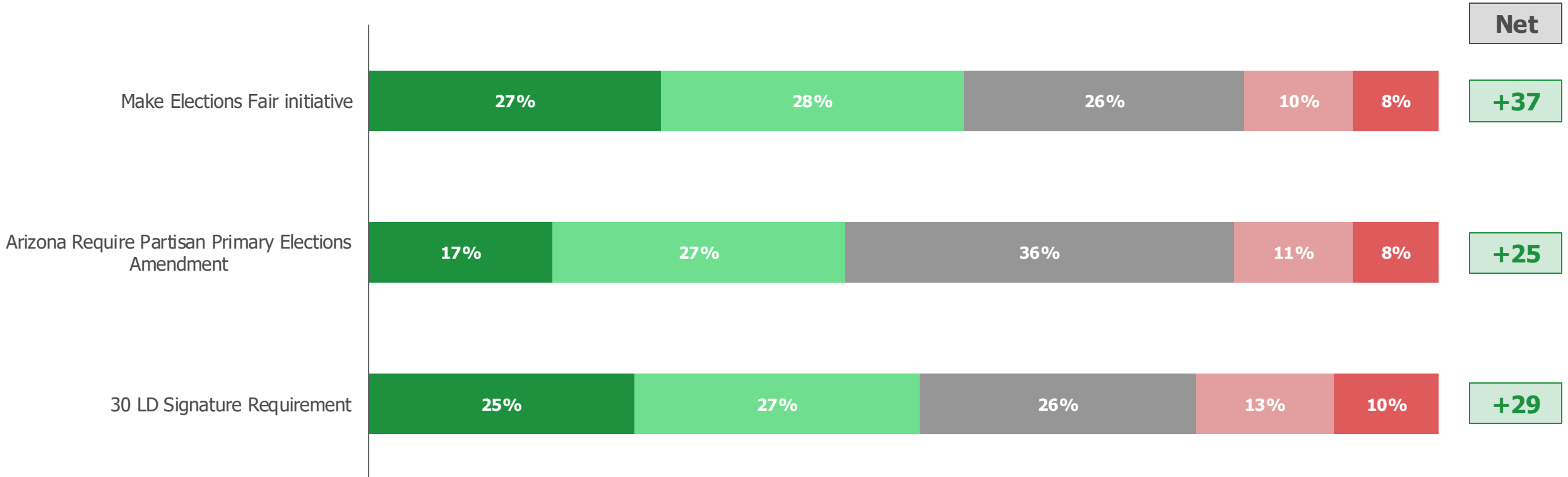
Cheat sheets



# Although both are popular despite the fact they conflict with one another, more Arizonans support an open primary system.

## Election-Related Ballot Measures

■ Strongly support  
 ■ Somewhat support  
 ■ Not sure  
 ■ Somewhat oppose  
 ■ Strongly oppose



Q) Do you support the Make Elections Fair initiative, which would eliminate partisan primary elections and require all candidates to run in an open primary, among other changes?

Q) Do you support Arizona Require Partisan Primary Elections Amendment, which would require a direct partisan primary election to be conducted for partisan offices?

Q) Do you support a ballot initiative that requires all citizen initiatives to collect signatures from all 30 state legislative districts to qualify for the ballot? (n=1640 Registered voters)

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# Cheat Sheet: Elections

# 10%

*Share of voters who say the results of the 2020 election are the most important position of a candidate for them to learn*

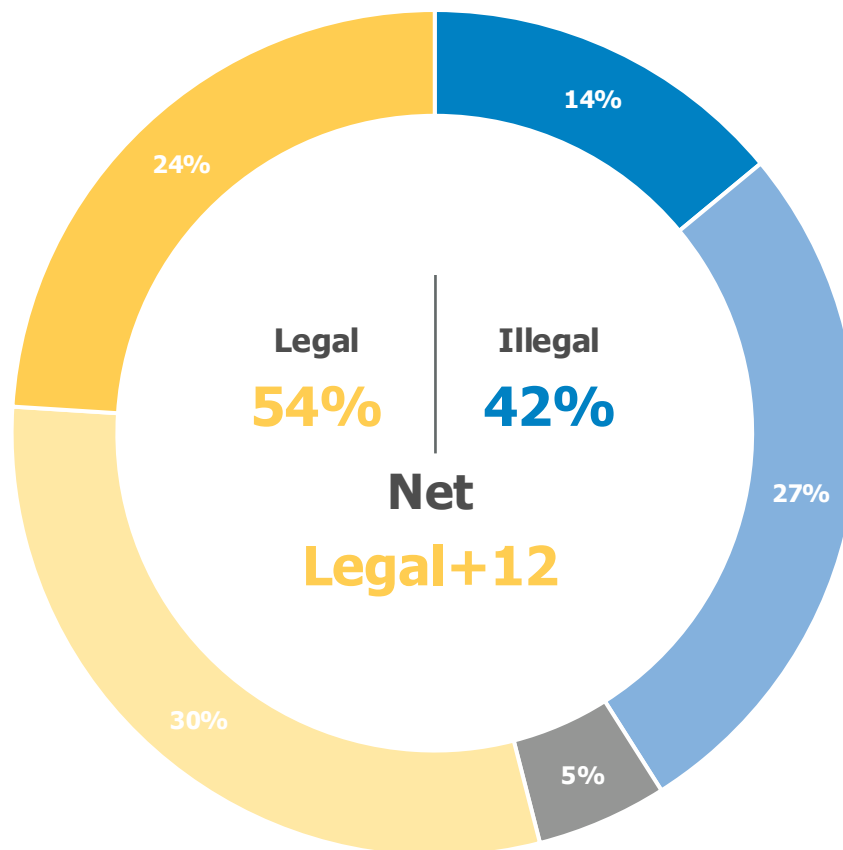
- Although they are a newsy topic, only 5% of voters consider elections their *most* important issue.
- Election-minded voters care about securing the integrity of current election laws more than implementing new laws increasing/decreasing ballot access or rehashing the 2020 election.

- Voters themselves aren't sure about the finer details of the debate between open versus partisan primaries – they support both partisan and open primaries.
- **Potential Question Topics:** *Why* candidates support or oppose partisan/open primaries.

# Republicans are the only large demographic who believes that abortion should be illegal in all/most cases.

## Opinions on Abortion

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



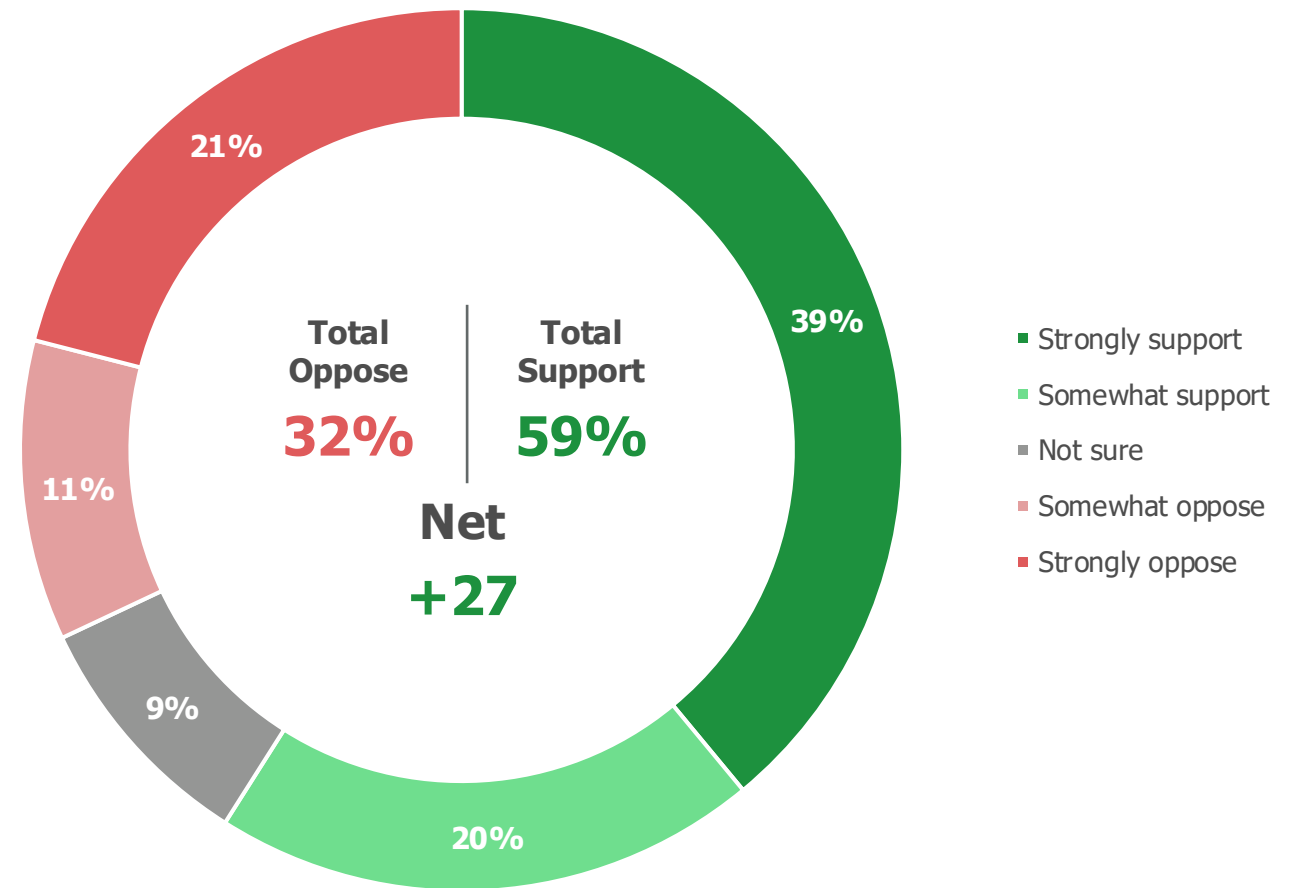
### Key Demographics:

- HHI \$50k-\$100k: **Legal +19**
- Independents: **Legal +12**
- Republicans: **Illegal -19**
- Democrats: **Legal +51**
- Maricopa County: **Legal +23**
- Hispanic/Latinos: **Legal +24**
- Women: **Legal +28**

# By a 2:1 margin, Arizona voters support adding abortion rights to the AZ Constitution

- The Arizona Abortion Access Act would amend the Constitution to:
  - Expressly state that every individual has a fundamental right to abortion
  - Prohibit Arizona from denying, restricting, or interfering with the fundamental right to abortion before fetal viability
- By Party:
  - Republicans: -6
  - Independents: +33
  - Democrats: +57

## Arizona Abortion Access Act



Q) Do you support the Arizona Abortion Access Act, which would establish the right to an abortion any time before the point of viability? (n=1640 Registered voters)  
Subgroups: Independents (n=483), Republicans (n=593), Democrats (n=564)  
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# Cheat Sheet: Abortion

# 54%

*Share of voters who say abortion should be legal in all or most circumstances*

- Roughly half of voters consider abortion when deciding their vote, and to those voters it is *very important*.
- Nearly two-thirds of Arizona voters (including 50% of Republicans) support the repeal of the 1864 abortion ban. One-quarter (27%) think it should have stayed in place.

- Abortion is a key issue in Arizona, but voters want deeper questions – they care less about a pro-choice/life label and more about the candidates' policy position.
- **Potential Question Topics:** Is there a point in pregnancy after which abortion should be banned? If so, after how many weeks?



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

Q) Do you believe Arizona lawmakers made the right choice to repeal the 1864 law that banned abortion in all cases except for the mother's life was in danger? (n=1640 Registered voters)

Subgroups: Republicans (n=593)

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# Voters want to curb illegal immigration, but are less sure what to do with legal immigrants.

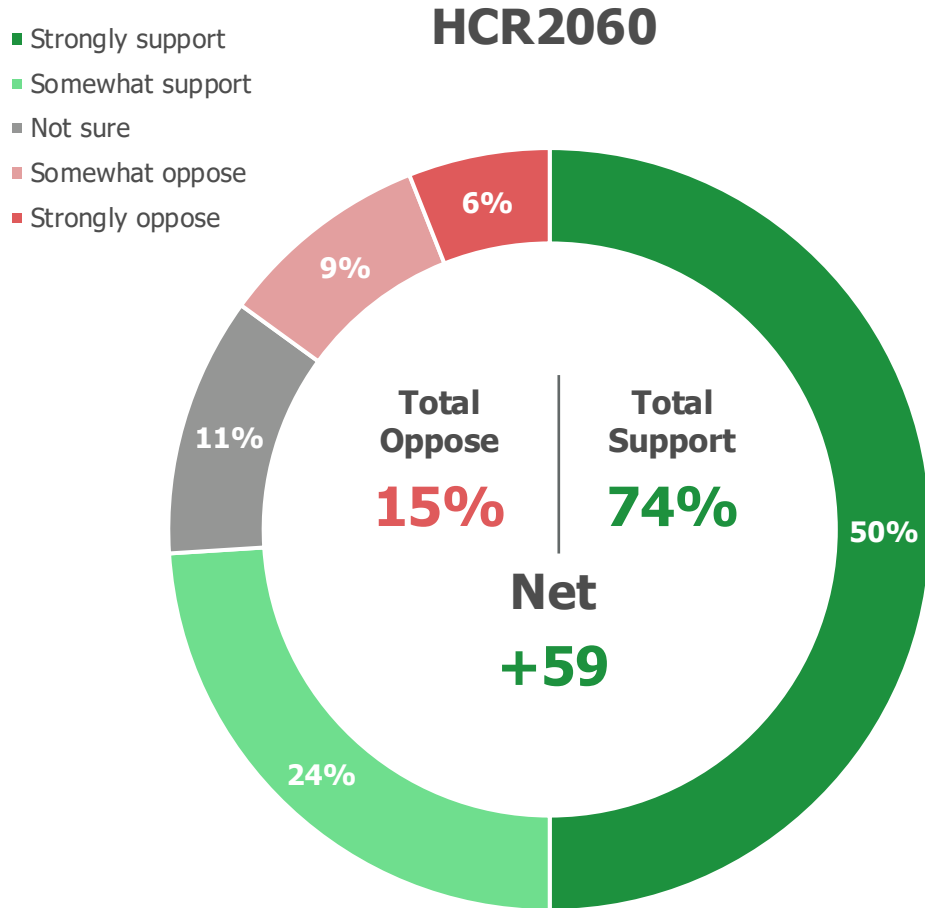
	Legal Immigration	Illegal Immigration
Increase	27%	13%
Remain the Same	29%	13%
Decrease	31%	<b>64%</b>
Unsure	12%	10%

Q) Should legal immigration be increased, decreased, or kept at current levels?

Q) Should illegal immigration be increased, decreased, or kept at current levels? (n=1640 registered voters)

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# Large majorities of Arizona voters support HCR2060 – primarily because of the work-verification requirements and the increased punishments for fentanyl dealers.



Why Supporters Support	
Requiring employers to verify the immigration status of workers	65%
Holding drug dealers responsible for the death of a person who consumes a drug containing fentanyl	65%
Determining how migrants obtain public benefits	44%

Why Opponents Oppose	
Requiring employers to verify the immigration status of workers	52%
Determining how migrants obtain public benefits	50%
Holding drug dealers responsible for the death of a person who consumes a drug containing fentanyl	40%

Q) Do you support HCR2060 - a ballot measure that would require employers to verify the immigration status of their workers, determine how migrants obtain public benefits, and make the seller of a drug containing fentanyl legally responsible for the death of any person who consumes a drug containing fentanyl? (n=1640 registered voters)

Q) Which portion of this ballot measure do you support? (n=1250 registered voters)

Q) Which portion of this ballot measure do you oppose? (n=230 registered voters)

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# Cheat Sheet: Immigration

# 15%

*Share of voters who say border security is the most important position of a candidate for them to learn (the highest of any individual issue)*

- Immigration – particularly border security – remains a dominant issue for Arizona voters. 3 in 5 voters consider immigration when deciding on a candidate.
- Arizona voters are fairly united in wanting illegal immigration to decrease (64%), but there is little agreement about *legal* immigration.

- One of HCR2060's biggest draws for certain voters is the same reason it is unpopular among others – it requires employers to verify an employee's immigration status.
- **Potential Question Topics:** Do you support requiring employers to verify the immigration status of their employees? Why or why not?

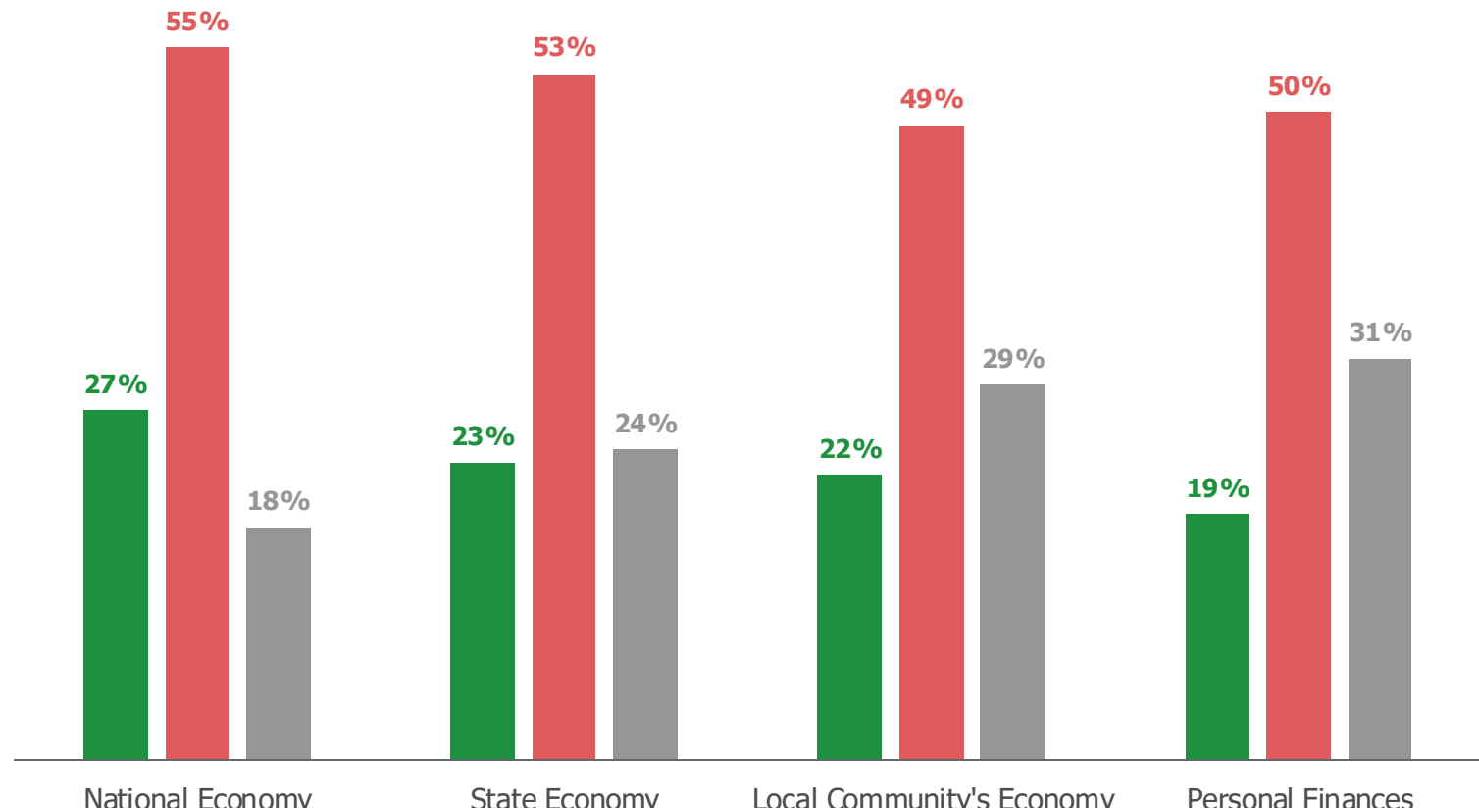


# To most voters, the perception of the economy everywhere is not doing well

- Across geographies, Democrats consistently rate the economy better than Republicans.
  - National
    - Democrats: Better +3
    - Republicans: Worse -63
  - State
    - Democrats: Worse -6
    - Republicans: Worse -61

## Optimism about the Economy

■ Getting better ■ Getting worse ■ Staying the same



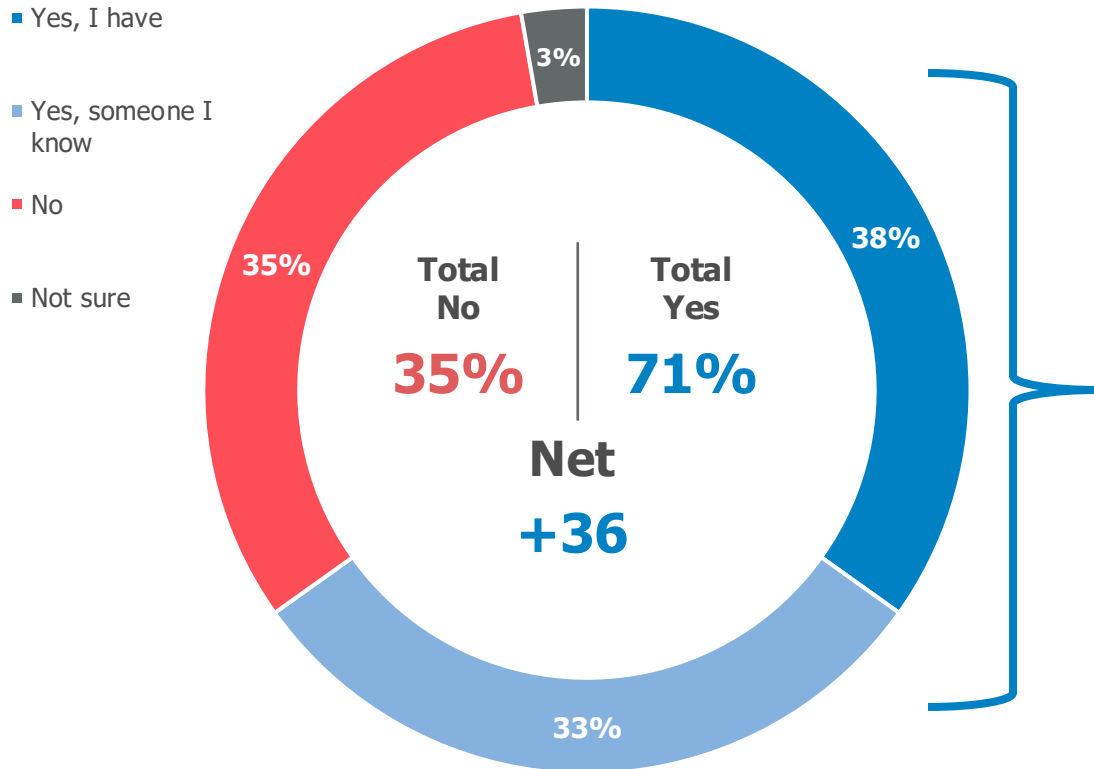
In each of the following areas, would you say that the economic/financial situation is getting better, getting worse, or staying about the same? Q) The national economy Q) The state economy Q) Your local community's economy Q) Your personal financial situation (n=1640 registered voters)

Subgroups: Republicans (n=593), Democrats (n=564)

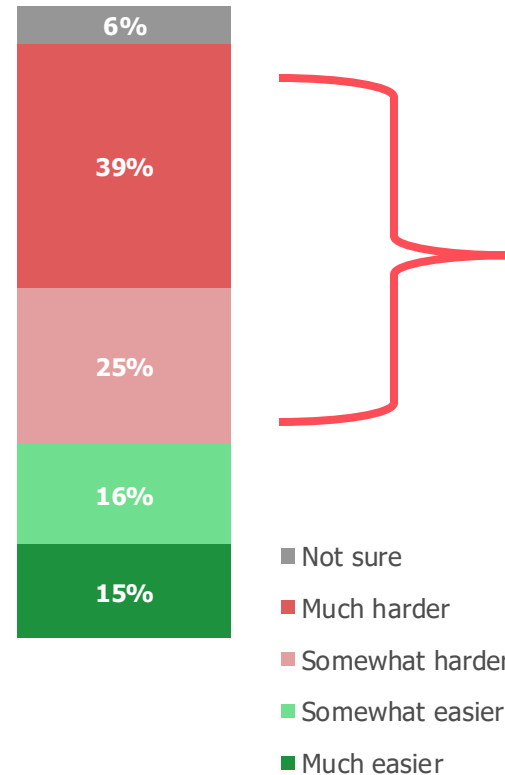
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# Arizona voters think the job hunt has gotten harder – largely because the right type of jobs aren't hiring, and the pay is not what voters need.

## Job Hunting in the Past 12 Months



## Job Search Outlook (among Total Yes)



## Job Search Barriers

(among Total Harder)

Type of jobs available	57%
Pay	56%
Applied, but received no further information	55%
Location	41%
Applied, and received rejections	37%
Interviewed for a position but received no further information	36%
Benefits	30%
Interviewed for a position but was rejected	27%
Something else	9%

Q) Have you, or someone you know, looked for work sometime in the last 12 months? (n=1640 registered voters)

Q) Would you say that the experience of finding a job is easier or harder than it was in the past? (n=1010 registered voters)

Q) What are some barriers you, or someone you know, have faced when looking for a job? (n=589 registered voters)

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# Cheat Sheet: Jobs

# 69%

*Share of voters who say issues related to jobs and the economy are important to know a candidate's position on when deciding whom to vote for in an election for state office*

- Jobs and the economy cross the minds of nearly 7 in 10 voters before casting their ballots.
- Inflation and gas prices are top-of-mind issues to voters – more so than the unemployment rate or minimum wage.

- Arizona voters are pessimistic about the future of the economy everywhere – nationwide, the state of Arizona, or the local community.
- **Potential Question Topics:** What concrete steps will you be able to take in your role as [insert political office] that will lower prices for Arizona families?

**Not much has  
changed in what  
type of candidate  
voters want...**

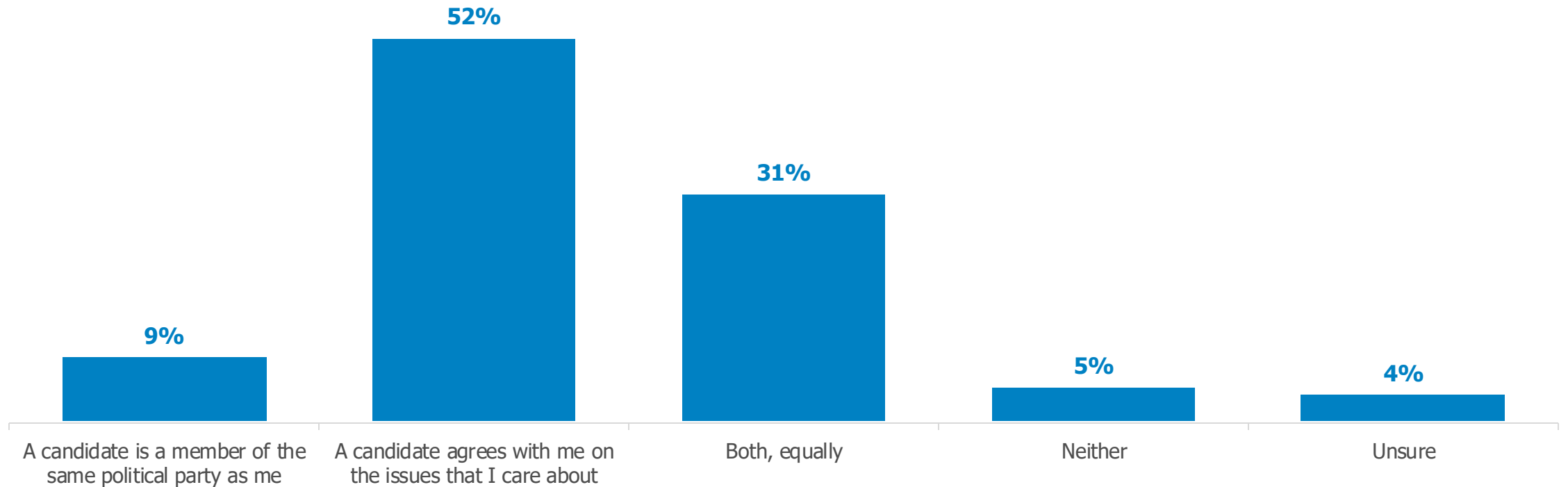
**Arizona voters want change.**

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

**Arizonans want  
ideological fighters**

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

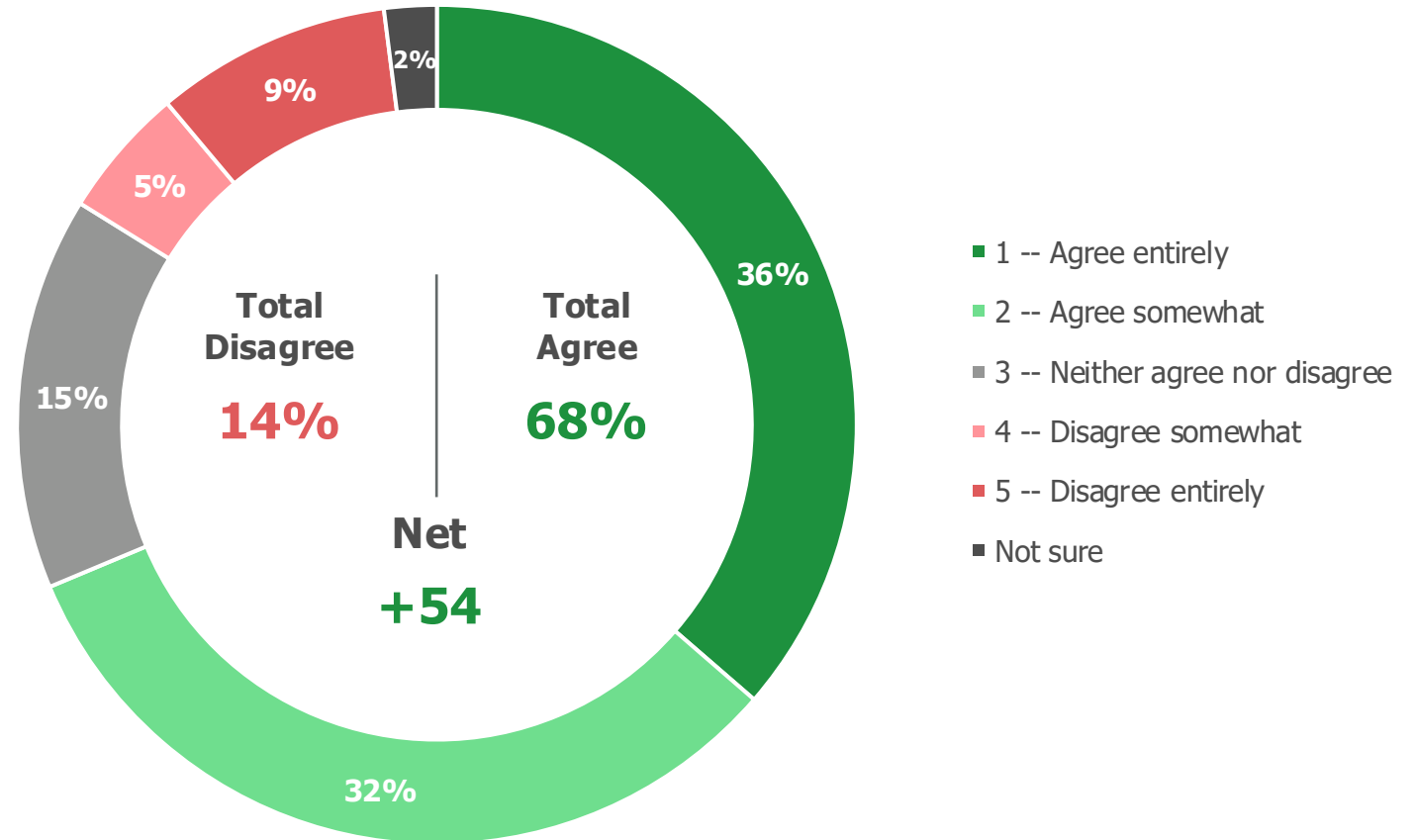
## Ideology v. Party



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

- Some demographics that are likely to cross party lines:
  - HHI >\$100k: 82%
  - Ages 18-34: 79%
  - Independents: 78%
  - Hispanic/Latinos: 74%

**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=1640 registered voters)  
 Subgroups: Independents (n=483), 18-34-year-olds (n=405), Hispanics/Latinos (n=235), HHI >\$100k (n=430)

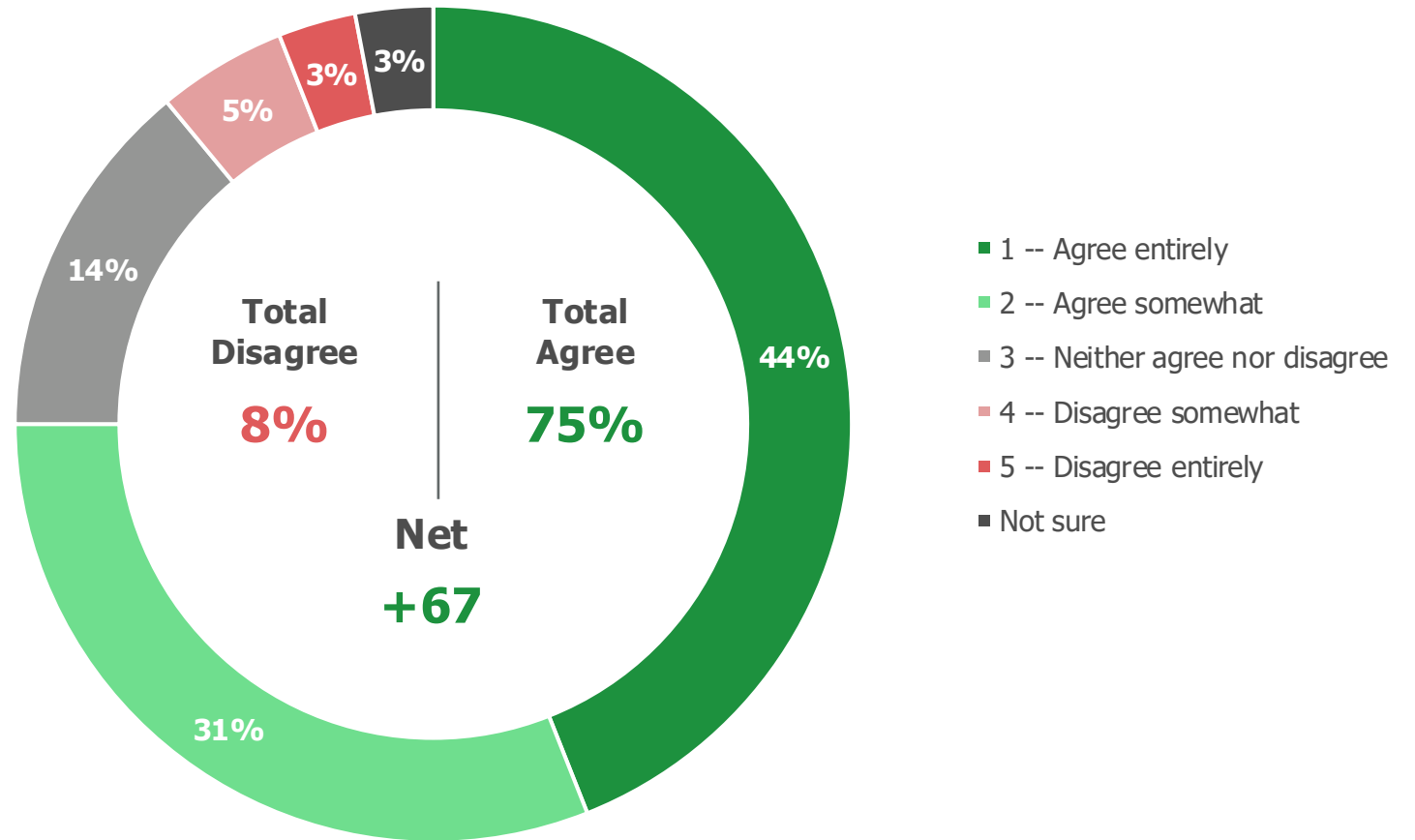
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# On issues Arizona voters care about, they want a fighter – someone so committed they'll anger others.

- Key demographics who want a 'puncher':
  - Conservatives: 82%
  - Ages 18-34: 76%
  - Republicans: 79%
  - Parents of children under 18: 78%
  - Liberals: 80%

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=1640 registered voters)  
 Subgroups: Conservative (n=510), 18-34 (n=405), Republican (n=593), has children under 18 (n=525), liberal (n=405)  
 † Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

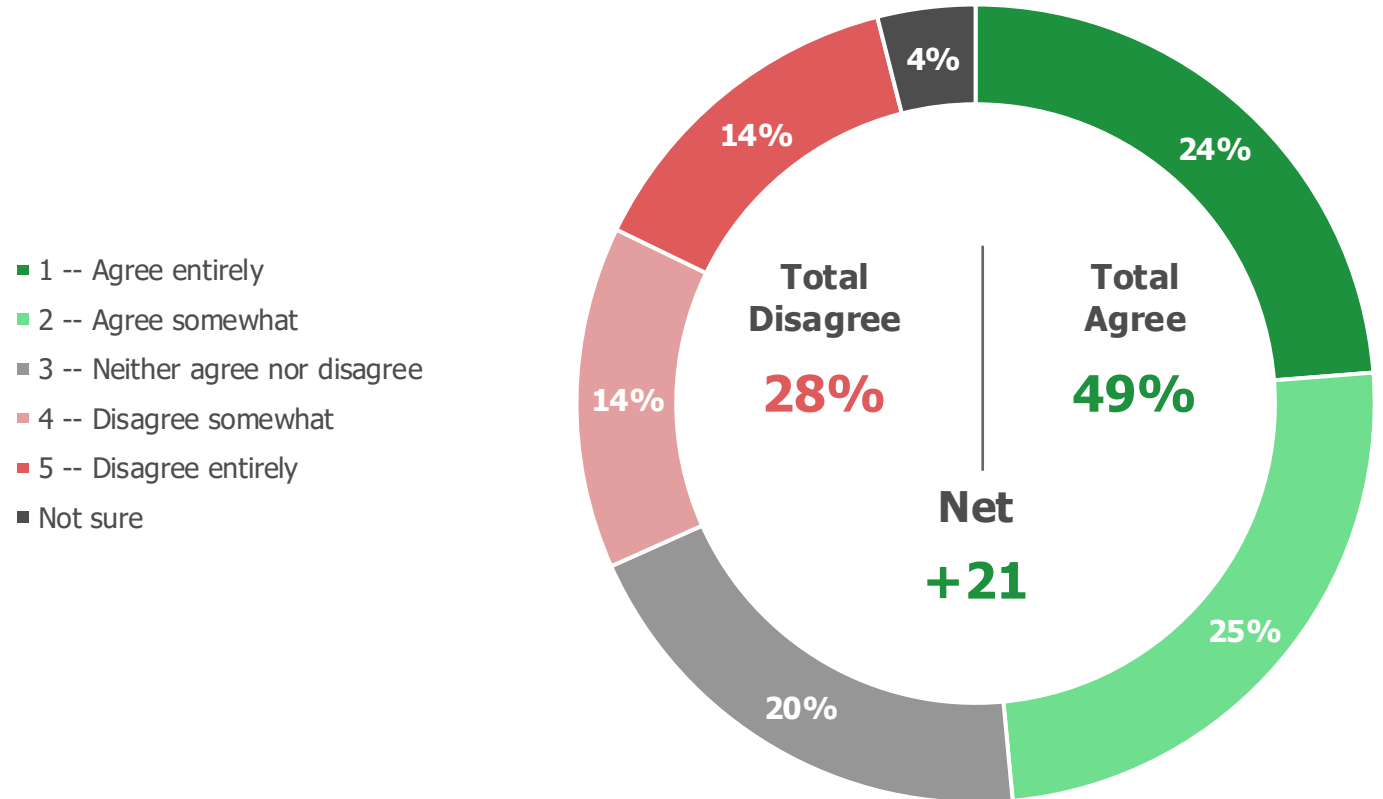
**All that being said,  
Arizonans want  
compromise too**

# Fighting and principles are healthy.

## But not everyone wants government to grind to a halt.

- Voters ages 18-34 (+42) are much more likely than voters ages 65+ (-5) to put ideological purity over efficient government.
- Republicans (+26) are more likely than Democrats (+16) or Independents (+20) 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=1640 Registered voters)

Subgroups: 18-34-year-olds (n=405), 65+ year olds (n=473), Republicans (n=593), Democrats (n=564), Independents (n=483)

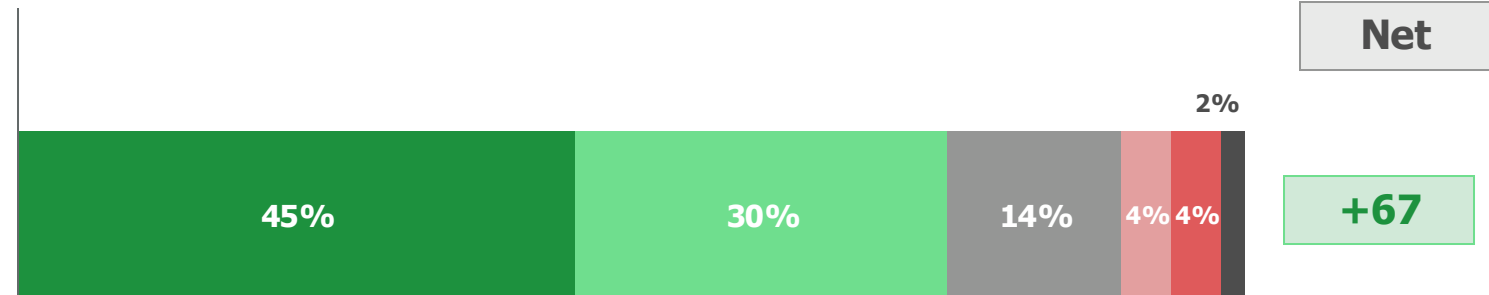
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

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

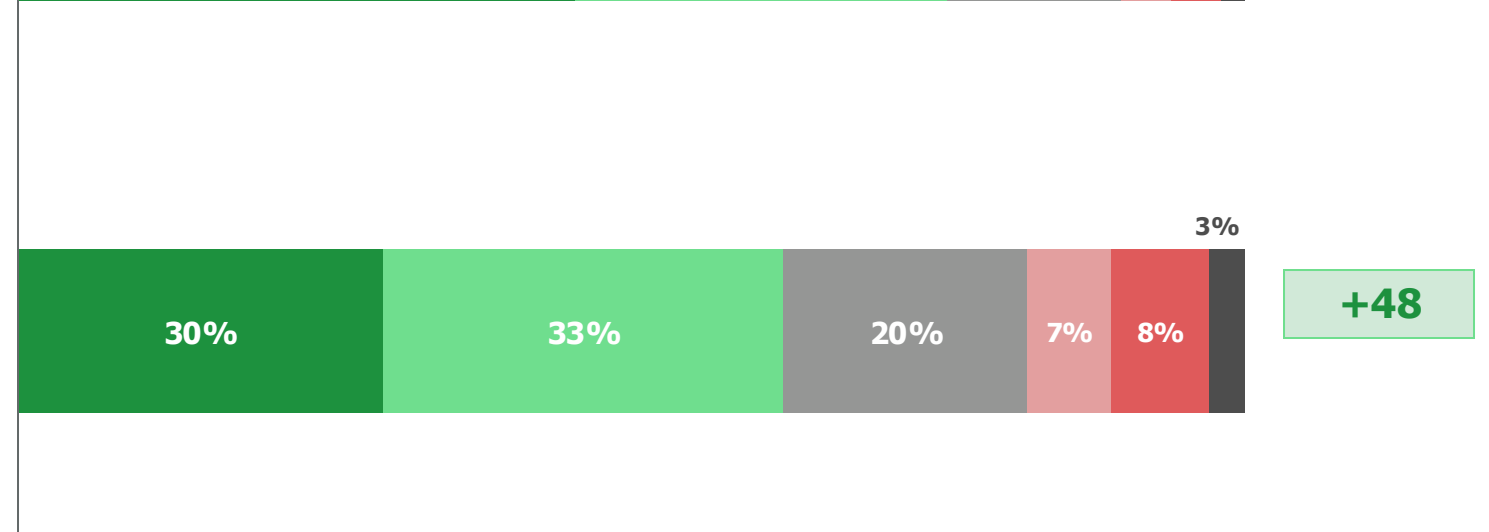
## Importance of Candidate Attitude and Temperament

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

A politician should work to maintain good relationships with their fellow elected officials ; there is no point in being rude and hard to work with

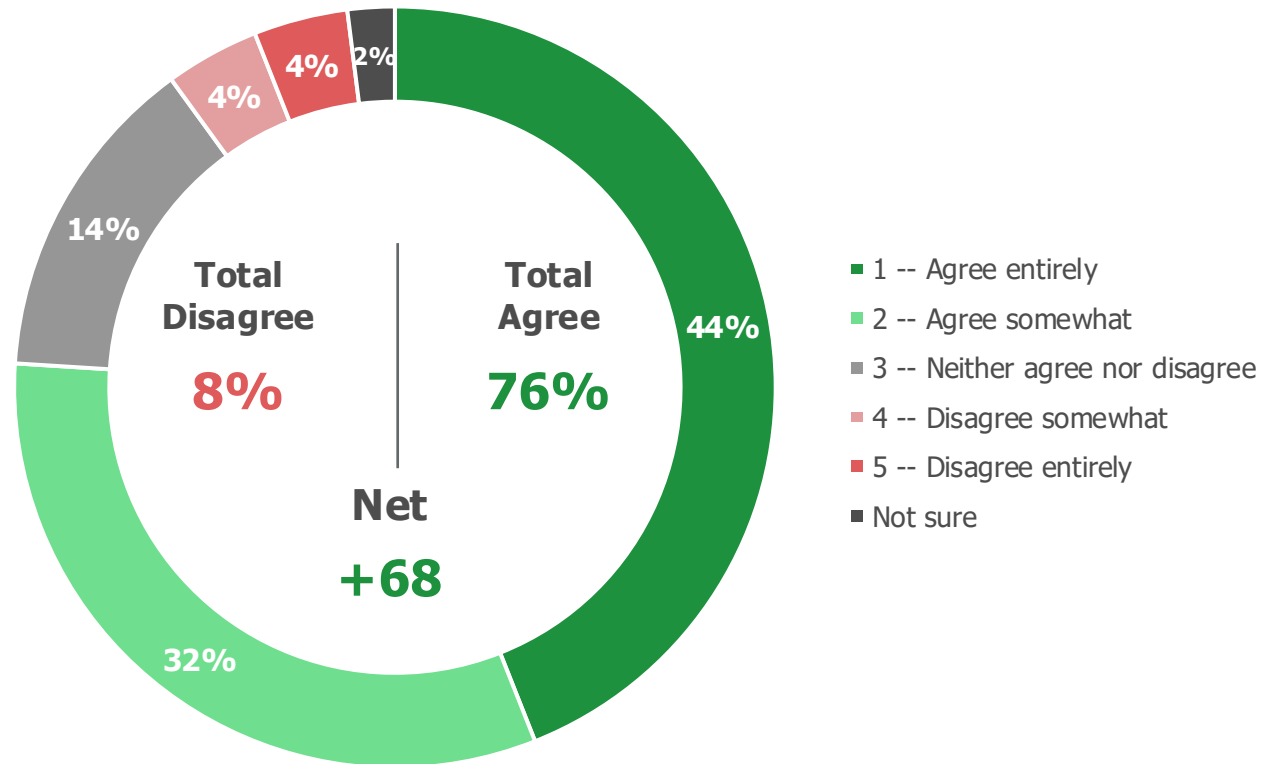


A candidate's attitude and temperament matter as much to me as their stances on policy issues



# But at the end of the day, 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**



## Key Demographics:

- Postgraduate Degree: **+81**
- HHI \$100k+: **+78**
- Aged 65+: **+78**
- College Degree: **+76**
- Democrats: **+75**

# Key Takeaways

- Voters feel that Arizona is heading in the wrong direction and they are divided on who should run the state. Ballot box decisions will come down to platform over party – candidates' stances on the **specific** issues they care about will matter most.
- 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.**

# Methodology

# Research Methodology

This poll was conducted by Noble Predictive Insights from July 29 - August 5, 2024 and surveyed Arizona registered voters via opt-in online panel and text-to-online SMS message in English and Spanish. The sample included 1,640 registered voters and 1,481 likely general election 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 +/- 2.6% 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	45%
Female	55%

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