



Arizona Political Climate Update

August 2024

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We are a research and nonpartisan polling firm providing market research, public opinion surveys, and advanced data analytics. NPI is nationally recognized for our survey methodology and services, which provide clients with trusted data to navigate challenges and inform strategic decisions.

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Our capabilities are expansive, utilizing qualitative and quantitative research methods while adhering to the highest industry standards. We specialize in research that provides advertising solutions, brand strategies, public affairs tracking, and election analysis.



Today's Topics

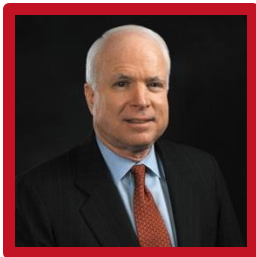
- ❖ A Lot Can Happen in 5 Years
- ❖ State of the State
- ❖ Coalition Shift
- ❖ The U.S. Senate Race
- ❖ Biden-Trump 2 (oh... wait)
- ❖ AZ = Ground Zero for 2024
- ❖ Ballot Props
- ❖ Rain, Rain, Come This Way

Presented by...

Mike Noble
Founder & CEO, NPI

A Lot Can Happen in 5 Years

Arizona's shift from a Ruby-Red Republican stronghold to a National Battleground Swing State



John McCain
US Senator



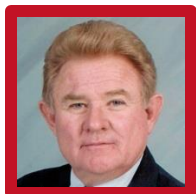
Jeff Flake
US Senator



Doug Ducey
Governor



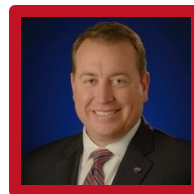
Michele Reagan
Secretary of State



Joe Hart
Mine Inspector



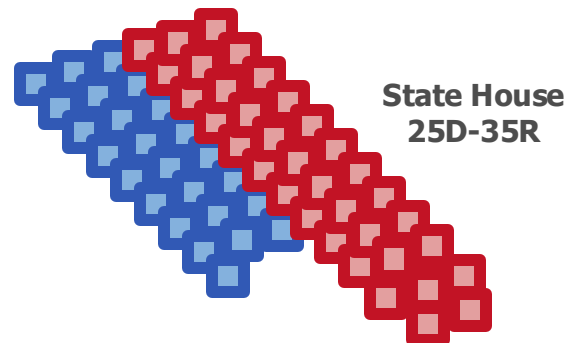
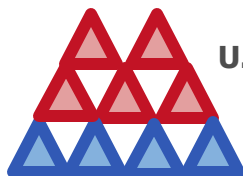
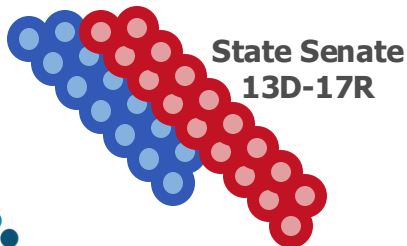
Diane Douglas
Supt. of Pub. Instr.



Jeff DeWit
Treasurer



Mark Brnovich
Attorney General





Kyrsten Sinema
US Senator



Mark Kelly
US Senator



Katie Hobbs
Governor



Adrian Fontes
Secretary of State



Paul Marsh
Mine Inspector



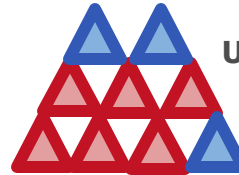
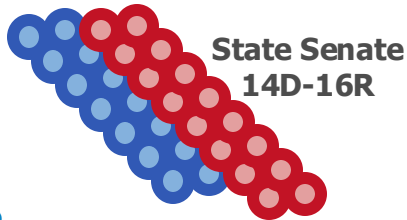
Tom Horne
Supt. of Pub. Instr.



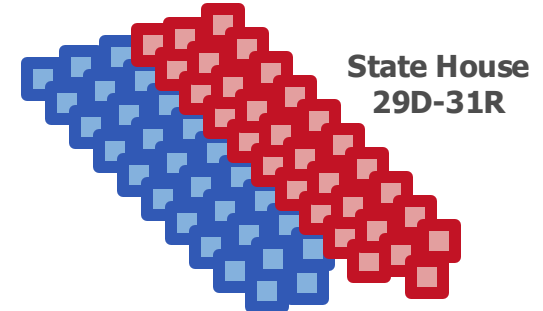
Kimberly Yee
Treasurer



Kris Mayes
Attorney General



AZ Corporation Commission
1D-4R



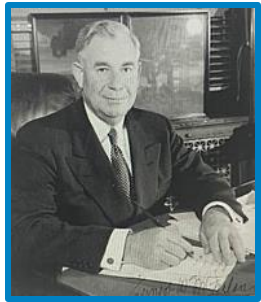
2022 Post-Midterm Elected Official Party Affiliation

Arizona has not had a Democratic Governor and two Democratic U.S. Senators since the 1950s – SEVEN DECADES!!!!!!!!!!

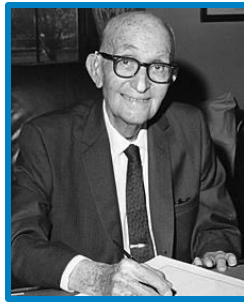
1950



Gov. Dan Edward Garvey



Sen. Ernest McFarland



Sen. Carl Hayden

Arizona's Governor and U.S. Senators

2023



Gov. Katie Hobbs



Sen. Kyrsten Sinema



Sen. Mark Kelly

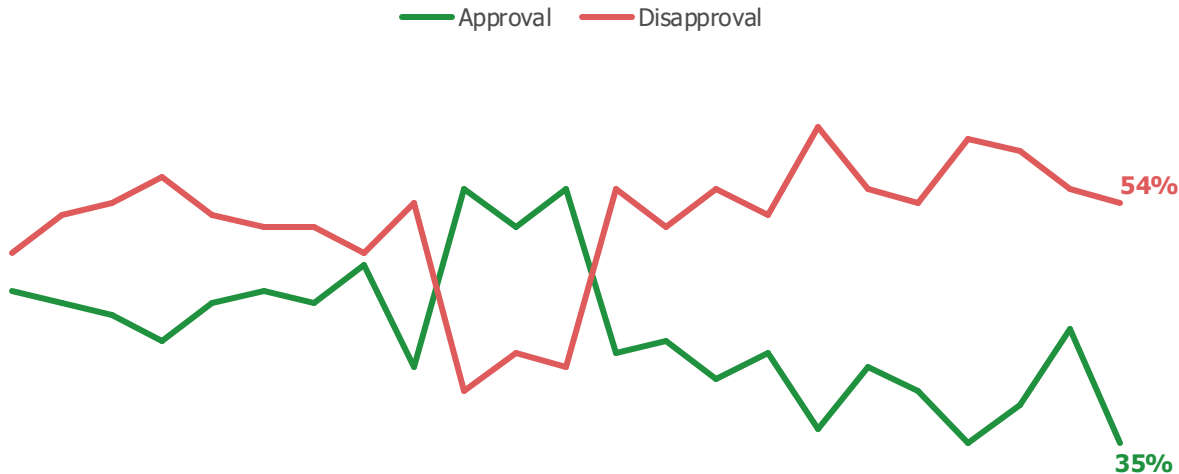
State of the State

Affordable housing overtook healthcare across demographics

After reaching the highest point in more than 2 years, Joe Biden's approval rating hits his all-time low for the third time

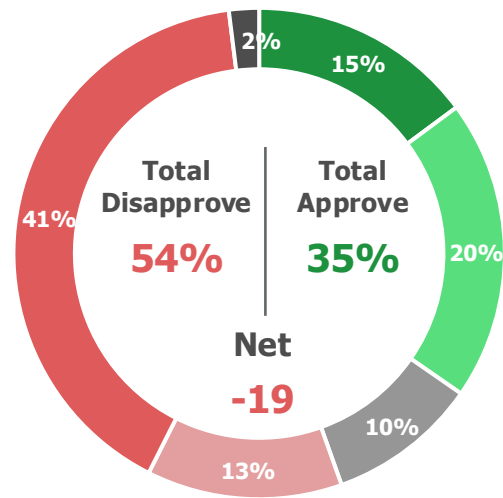
Presidential Approval Rating

— Approval — Disapproval



Biden Job Approval

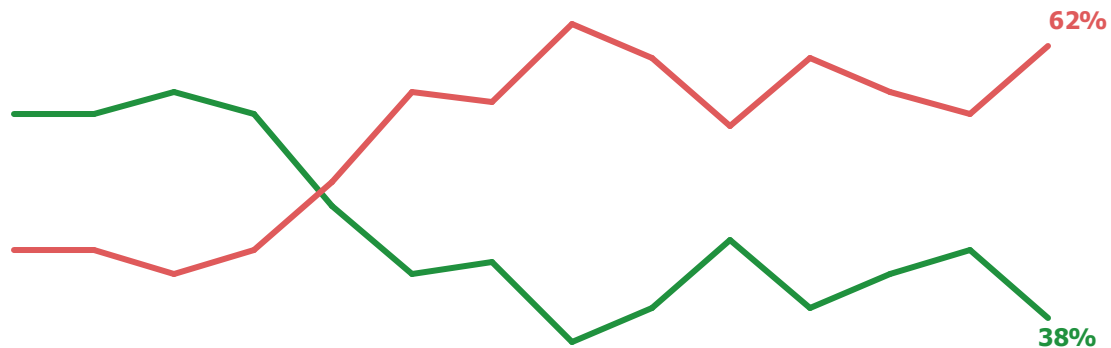
- Strongly approve
- Somewhat approve
- Neither approve nor disapprove
- Somewhat disapprove
- Strongly disapprove



Voters are increasingly unhappy with the direction Arizona is headed

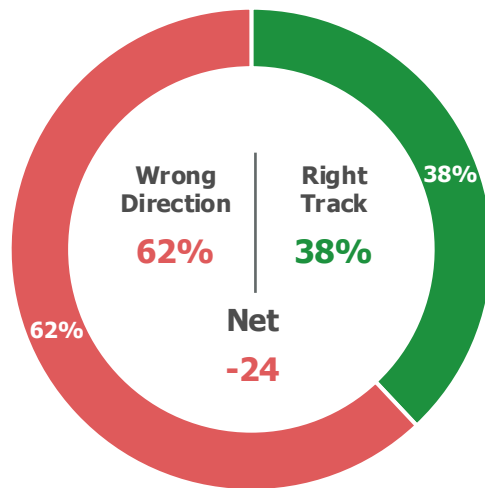
Trajectory of Arizona

— Arizona is going on the right track — Arizona is going in the wrong direction



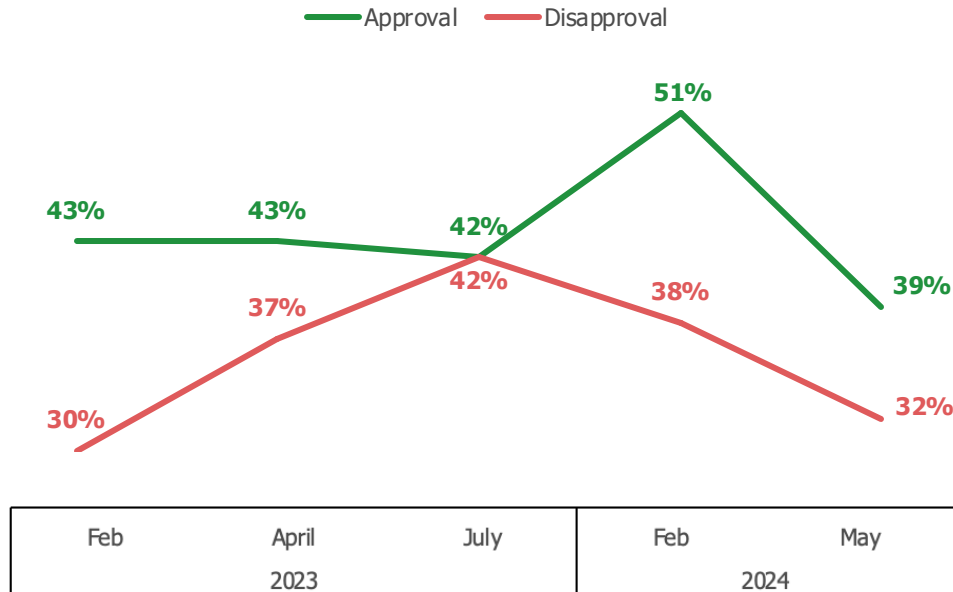
Trajectory of Arizona

■ Right Track ■ Wrong Direction



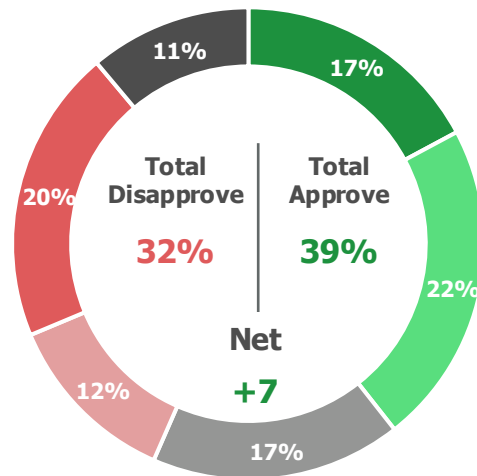
Arizona voters are souring on Governor Katie Hobbs, but she still manages to keep a net-positive approval rating

Governor Katie Hobbs Job Approval



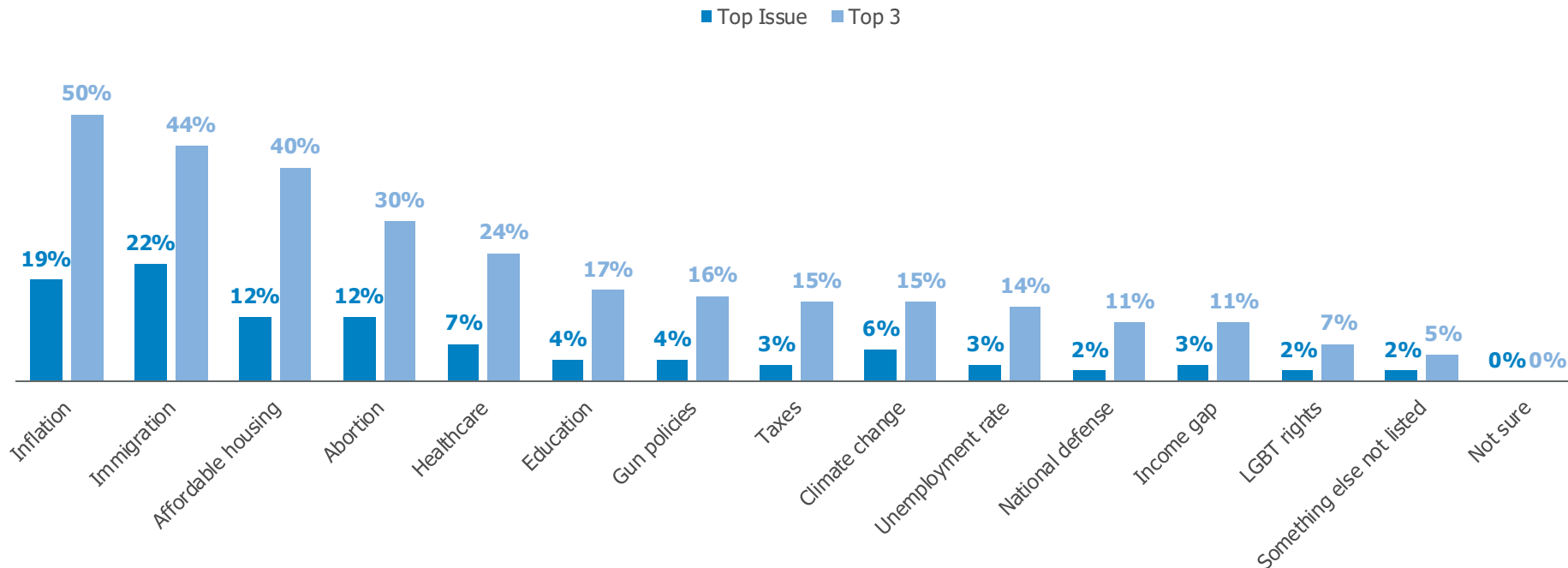
Hobbs Job Approval

- Strongly approve
- Somewhat approve
- Neither approve nor disapprove
- Somewhat disapprove
- Strongly disapprove
- Not sure



Inflation and immigration are the top concerns, with affordable housing on the rise

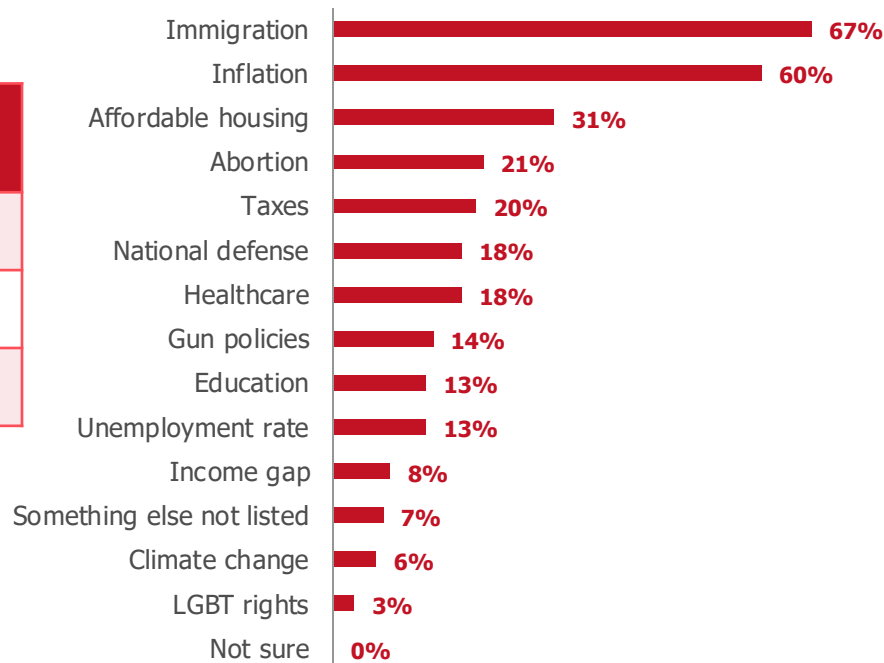
Top Issues Facing Arizona



For Republicans, the top issues are immigration and inflation, by a landslide. The same is true of GOP base demographics.

Rural areas	High school level/some college
Inflation (48%)	Inflation (54%/47%)
Immigration (46%)	Affordable Housing (44%/42%)
Affordable Housing (34%)	Immigration (37%/46%)

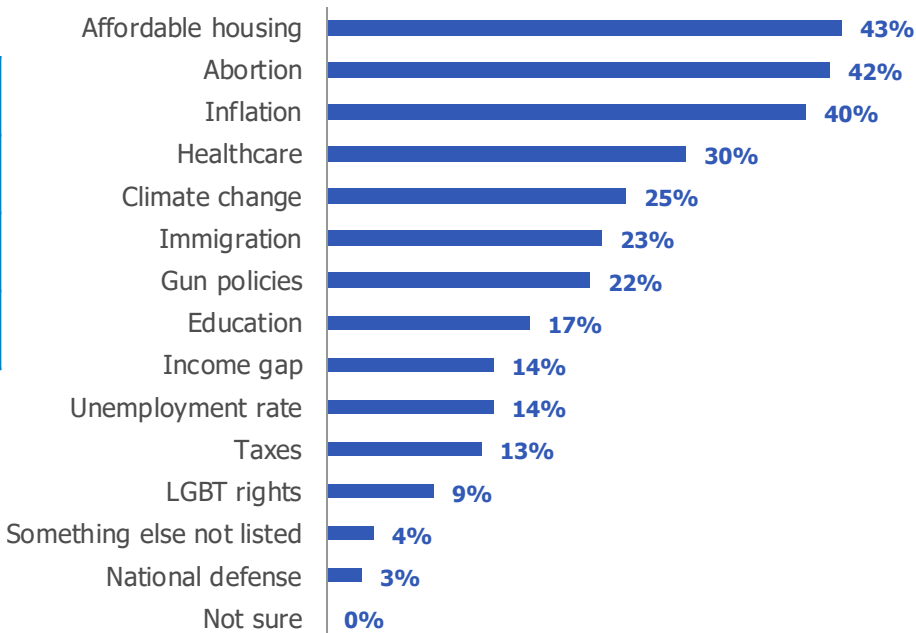
Top 3 Issues Among Republicans



Democrats care about affordable housing, abortion, and inflation the most – but, unlike the GOP, there are no runaway top issues.

Ages 18-34	College/Post-grads
Inflation (52%)	Inflation (53%/47%)
Affordable Housing (49%)	Affordable Housing (38%/28%)
Abortion (35%)	Abortion (29%/30%)

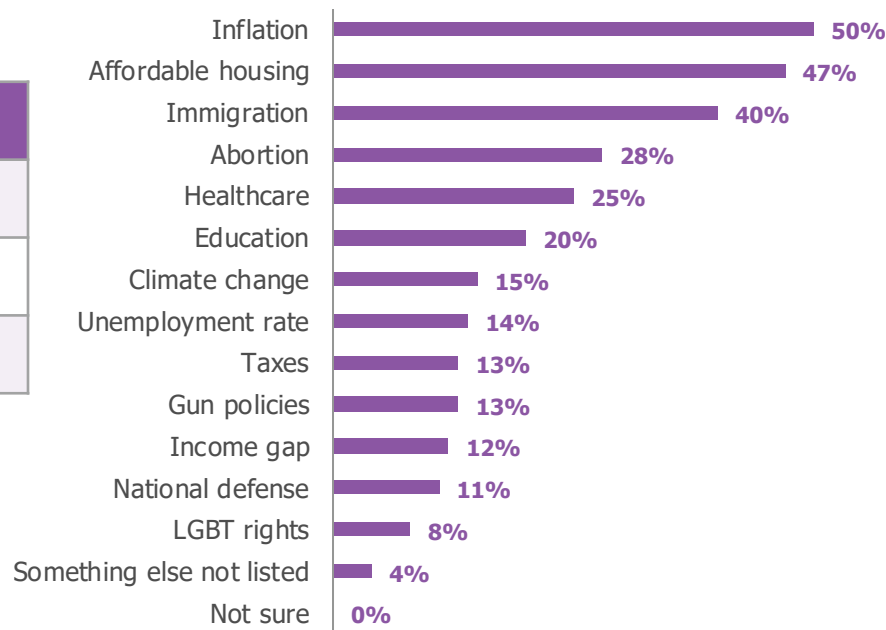
Top 3 Issues Among Democrats



Independents are split. They care about immigration (a GOP issue), abortion (a Dem issue) as well as inflation and housing costs (broad economic concerns)

Hispanic/Latinos	Moderates
Inflation (53%)	Inflation (50%)
Affordable Housing (50%)	Affordable Housing (46%)
Abortion (30%)	Immigration (38%)

Top 3 Issues Among Independents



Coalition Shift

We're witnessing the biggest coalition shift between the two parties since the Civil Rights Movement

Part of the reason: erosion among Black and Latino voters. Working-class voters of all races care about the economy and immigration. That's helping Trump gain votes.

American politics is going through a racial realignment, with non-white voters shifting away from the Democrats and towards the Republicans

Non-white Americans' vote intention in pre-election polls for presidential elections (%)



Source: FT analysis of American National Election Studies, Cooperative Election Study and New York Times / Siena College poll (2024)
FT graphic: John Burn-Murdoch / @jburnmurdoch
© FT

The income divide in US politics has almost closed, and the richest now favour Democrats over Republicans

Democrat-Republican margin (% pts) in US elections, by income group



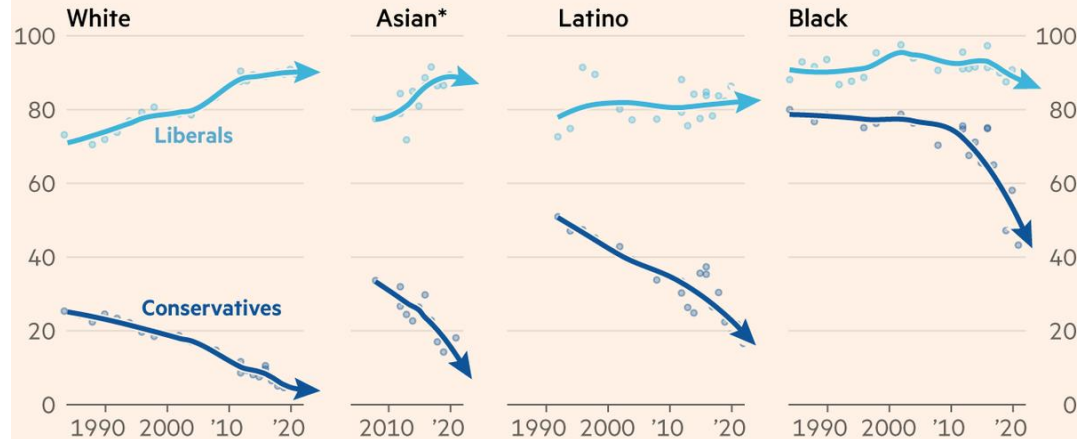
Source: FT analysis of American Election Studies
FT graphic: John Burn-Murdoch / @jburnmurdoch
© FT

Additionally, conservative non-White voters are beginning to break away from the Democratic Party

- Compared to the 1990s, when even conservative Black voters identified as Democrats, non-White voters are starting to become more ideologically sorted into the two parties.
- In other words, conservatives are moving to the Republican Party regardless of their race or ethnicity.

Large numbers of non-white **conservatives** used to identify as Democrats, but they have been shifting away in recent years

Percentage of **liberals** and **conservatives** of each race who identify as Democrats



Source: FT analysis of American National Election Studies and Cooperative Election Study. *Insufficient data before 2008

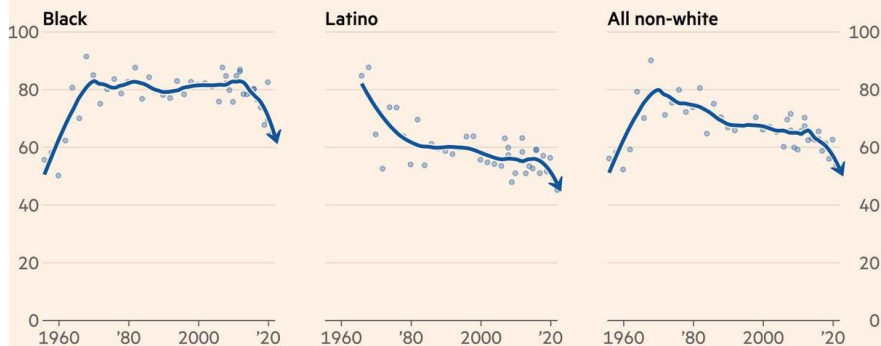
FT graphic: John Burn-Murdoch / @jburnmurdoch

© FT

REMEMBER – polls don't always perfectly predict what will happen. But the results usually point in the right general direction.

Democrats' advantage with non-white voters has been rapidly eroding and is now at its weakest since the 1960s

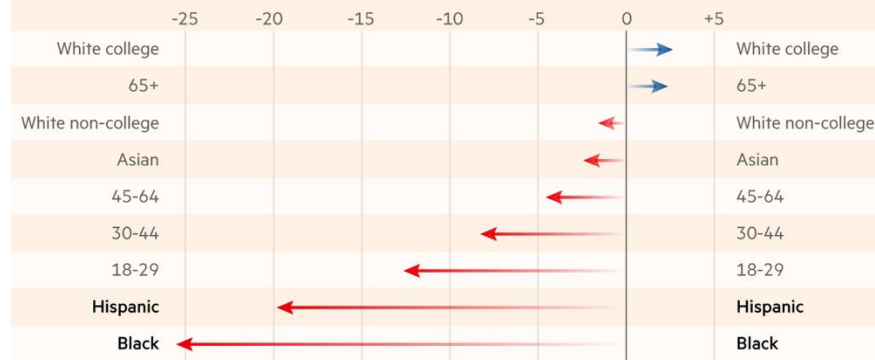
Share of non-white US adults who identify as Democrats (%)



Source: FT analysis of American National Election Studies and Cooperative Election Study
FT graphic: John Burn-Murdoch / @jburnmurdoch
© FT

Latest polls show Democrats going backwards faster with Black and Latino voters than any other demographic

Swing **towards** or **away from** Dems compared to 2020 result, by demographic (% pts)

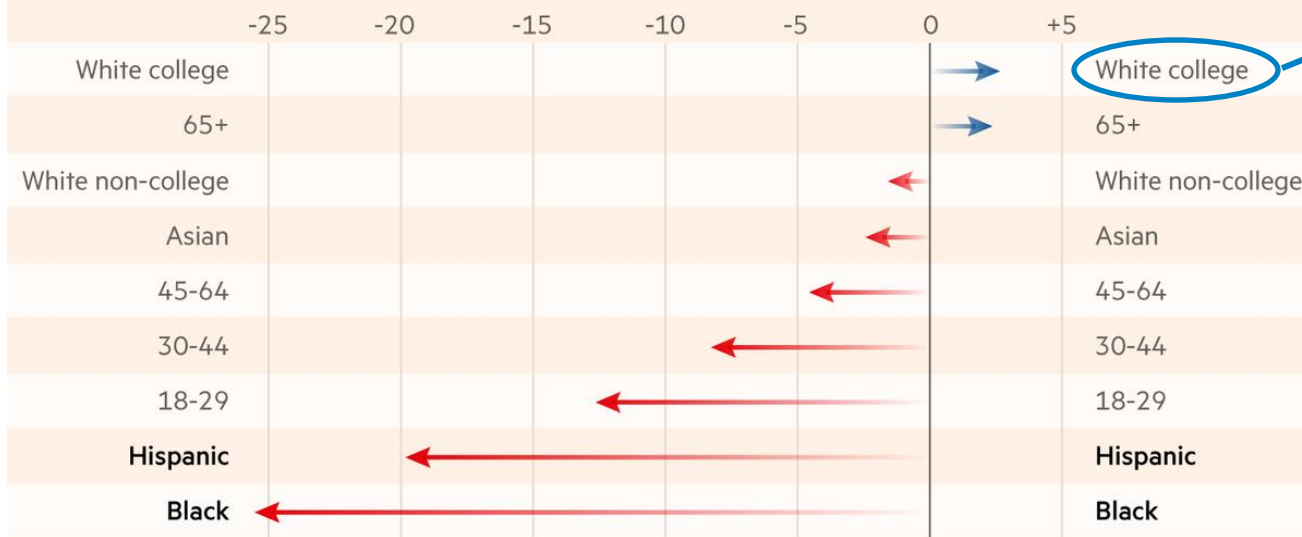


Sources: Adam Carlson (@admcrln), FT analysis of recent polls
FT graphic by John Burn-Murdoch / @jburnmurdoch
© FT

Biden's key non-economic issues – abortion and Jan. 6 – are helping him hold on to White college-educated voters

Latest polls show Democrats going backwards faster with Black and Latino voters than any other demographic

Swing **towards** or **away from** Dems compared to 2020 result, by demographic (% pts)

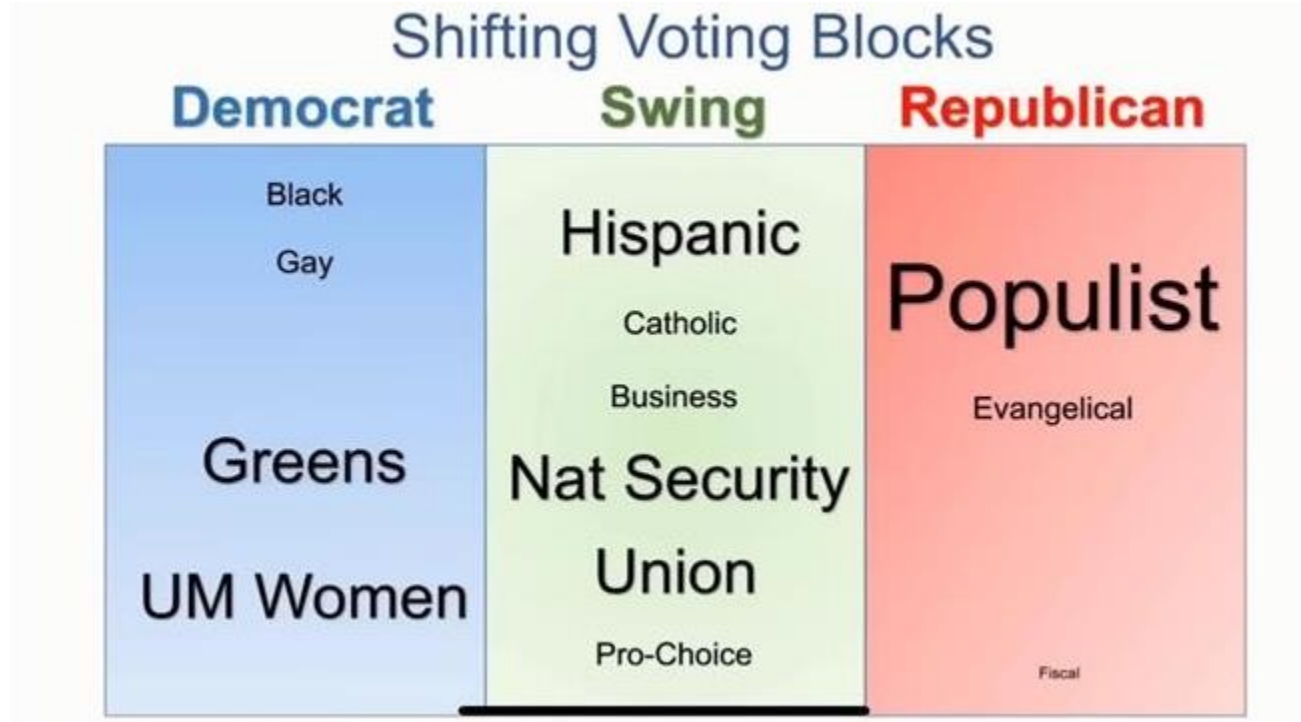


White, college - educated voters are one of the few demographics where Biden's performance is improving.

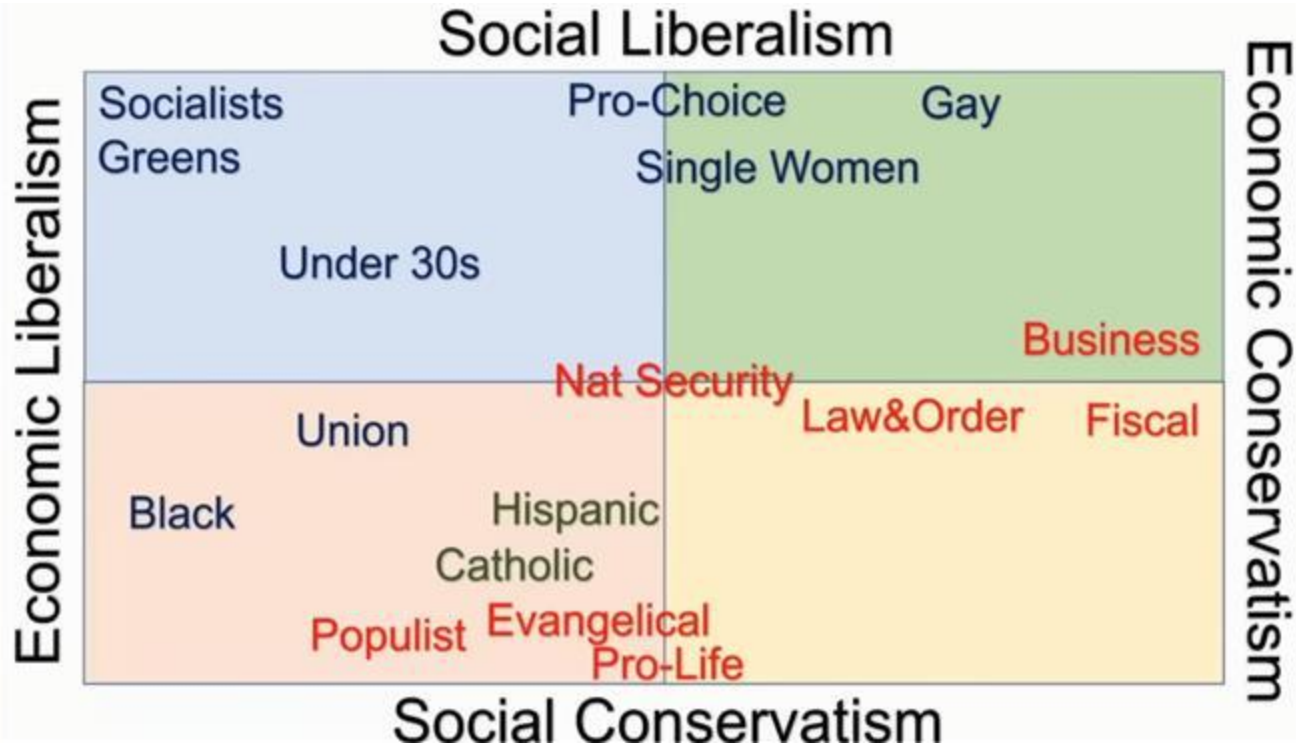
Sources: Adam Carlson (@admcrln), FT analysis of recent polls
FT graphic by John Burn-Murdoch / @jburnmurdoch
© FT

Shifting Voting Blocks		
Democrat	Swing	Republican
Black Gay Socialist Under 30s Greens Union UM Women Pro-Choice	Hispanic Catholic	Business Nat Security Evangelical Populist Pro-Life Fiscal

Now...



Maybe use...

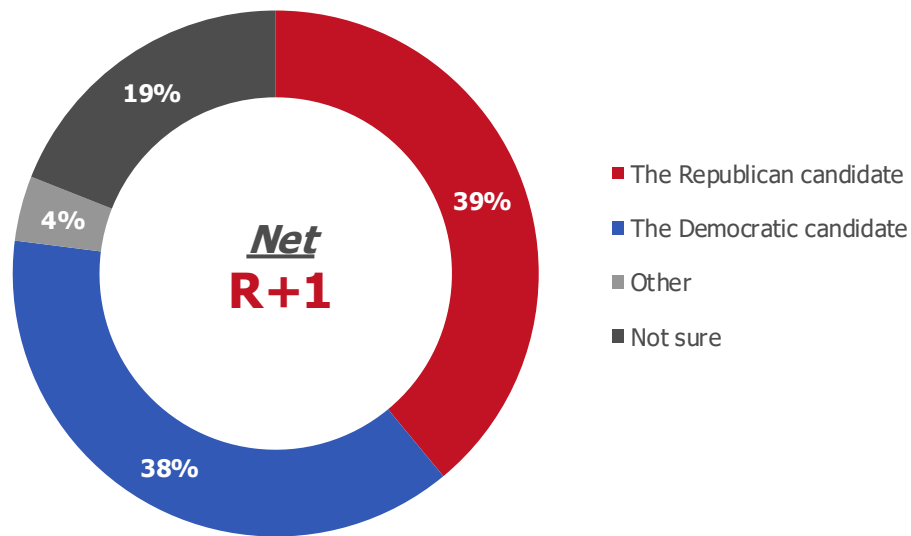


U.S. Senate Race

Arizona voters are not particularly fond of Kari Lake

At the moment, the race for Congress is a dead heat

Preferred Party to Lead Arizona



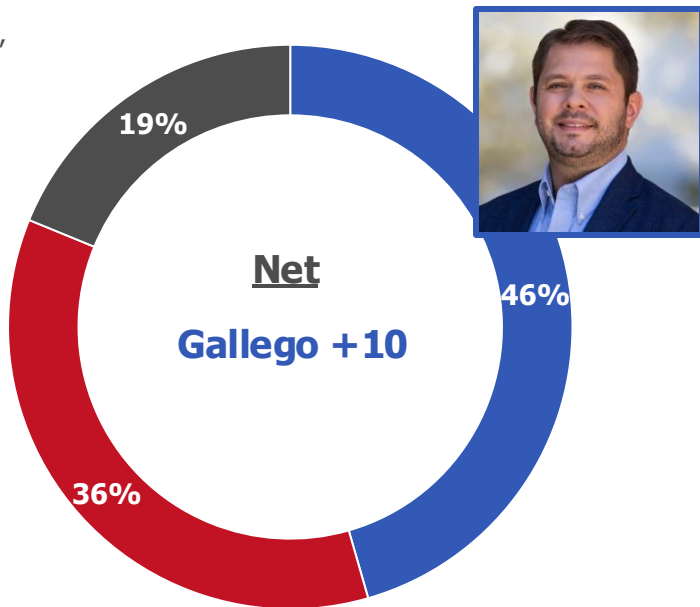
Historically Influential Demographics:

- Suburbanites **R+5**
- Hispanic/Latino **D+9**
- Independents **D+1**

However, Lake has major ground to make up in a head-to-head match-up against Gallego

2024 Hypothetical Head-to-Head US Senate Race

- Ruben Gallego, Democrat
- Kari Lake, Republican
- Not Sure



Historically Influential Demographics

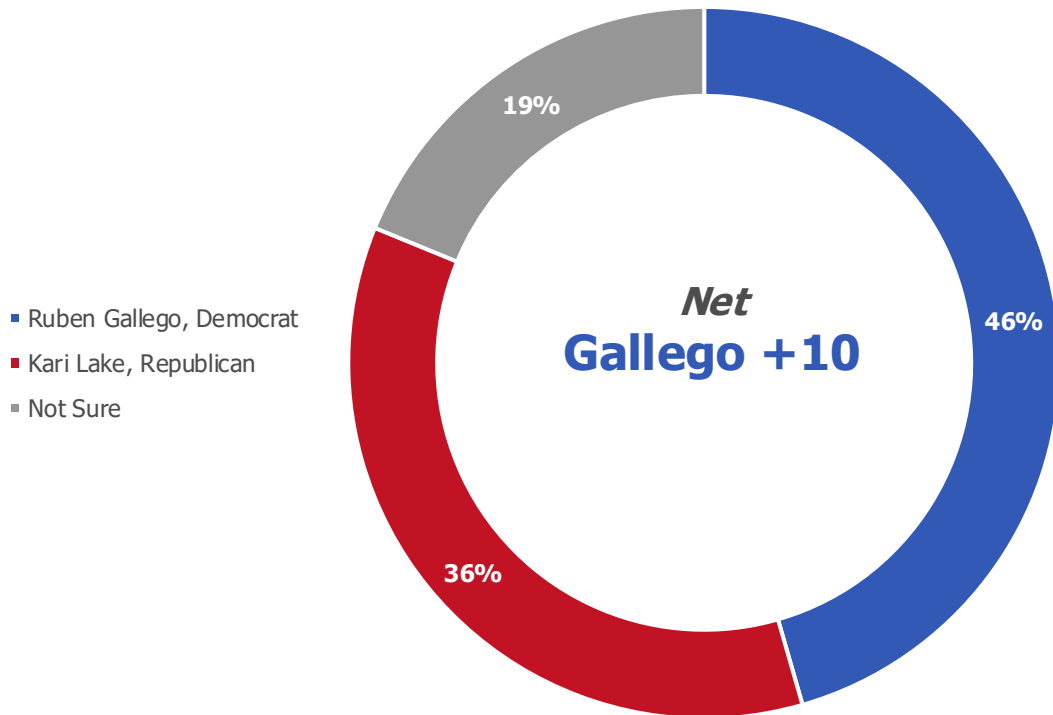
- Suburbanites: **Gallego +10**
- Hispanic/Latinos: **Gallego +16**
- Independents: **Gallego +16**

Lake is doing worse than Trump among some super-duper important groups for her

Kari Lake is underperforming Trump's statewide vote share by 8 points, in part due to falling short among these groups:

- Republicans (71% vs 84%)
- Ages 55+ (42% vs 50%)
- Women (30% vs 39%)
- Suburbanites (38% vs 46%)
- Trump-first GOP (82% vs 95%)
- Party-first GOP (69% vs 79%)
- Independents (26% vs 36%)

2024 US Senate Race

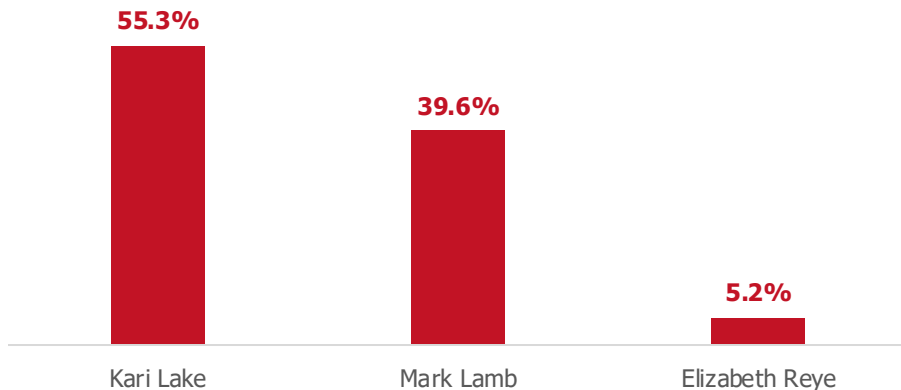


Q) If the 2024 Senate election were being held today, who would you vote for?
Subgroups: Republicans (n=364), Ages 55+ (n=487), Women (n=577), Suburbanites (n=486),
Independents (n=255), Trump-First GOP (n=183), Party-First GOP (n=152)

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

Republicans elected Lake despite liking Lamb just as much

2024 GOP Senate Primary Results



Lake **+15.7**

Kari Lake



Net Fav +32

Total Favorable 60%

Total Unfavorable 28%

Mark Lamb



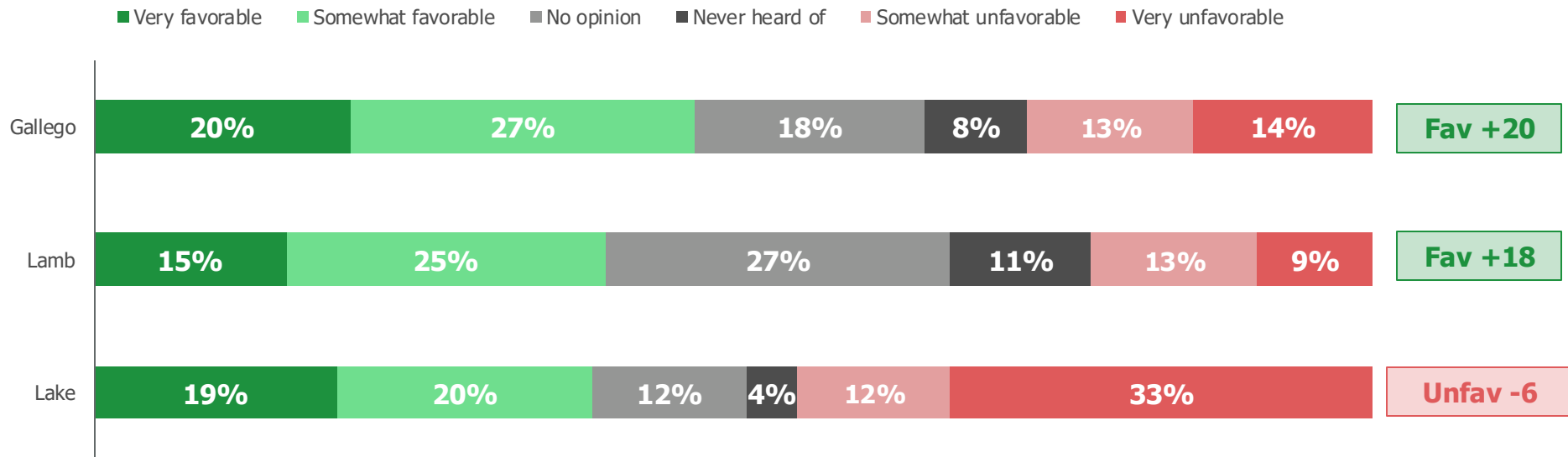
Net Fav +36

Total Favorable 52%

Total Unfavorable 16%

Republicans nominated a candidate with less *statewide* appeal. Lamb/Gallego treated as generic partisans meanwhile, Lake is *DEFINED*

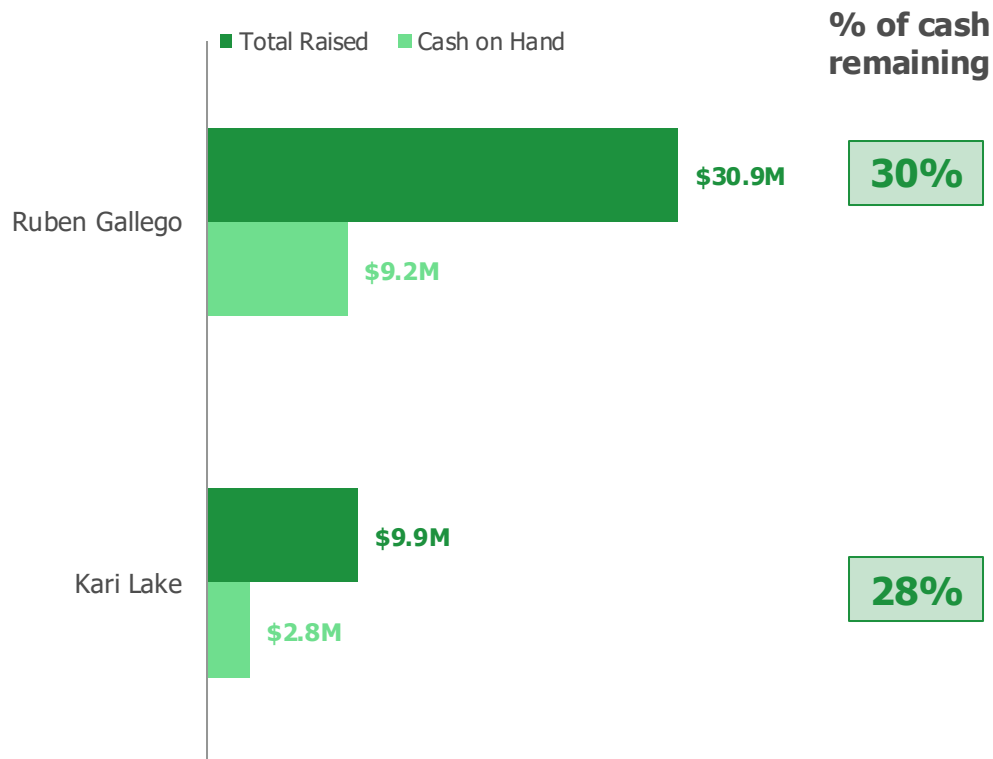
Favorability of US Senate Candidates



Gallego runs laps around Lake in financing

- Gallego lags behind Mark Kelly at the same point in the 2022 cycle.
- After Q2 2022, Kelly had raised nearly \$52M and had \$25M cash on hand.
- Lake, on the other hand, is outpacing Blake Masters' 2022 total. By the end of Q2 2022, Masters had raised \$4.2M and had \$1.6 cash on hand.

Financial State of the Senate Race



Source: opensecrets.org
Date Accessed: 7/22/24

Biden-Trump (Oh, wait... Trump-Harris?)

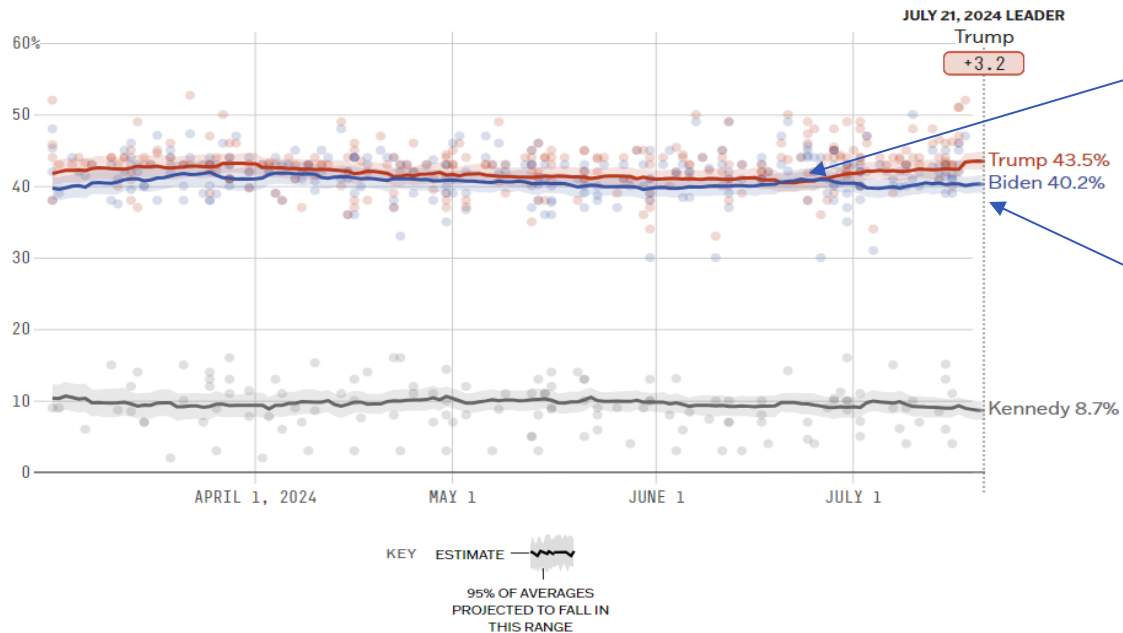
Trump wasn't winning the race – but Biden sure was losing

Things were not
looking good for the
Democratic Party

Biden's poll performance was on the decline.

Who's ahead in the national polls?

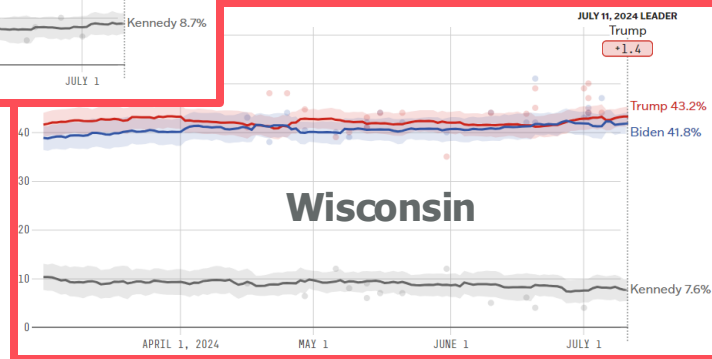
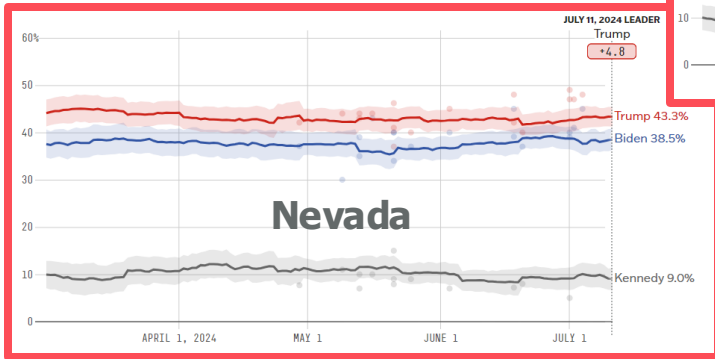
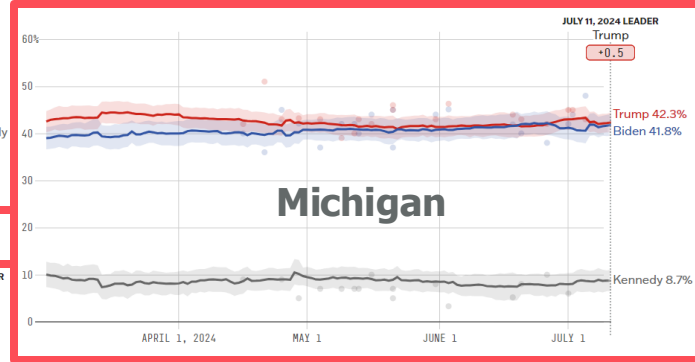
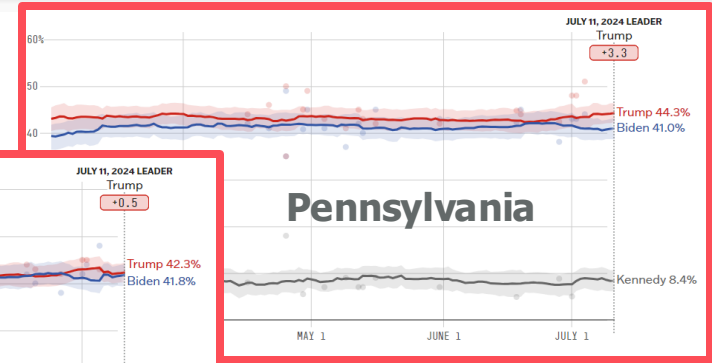
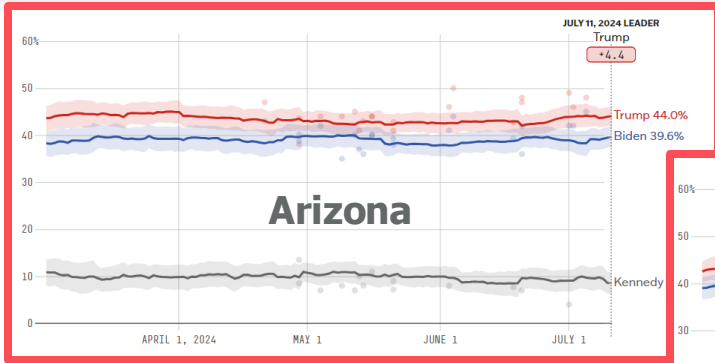
Updating average for each candidate in 2024 presidential polls, accounting for each poll's recency, sample size, methodology and house effects.



The debate

Biden drops-out

Reason Why Biden Dropped Out: Trump was leading the race in every swing state



Reason Why Biden Dropped Out: Trump was making blue states closer than Democrats needed them to be



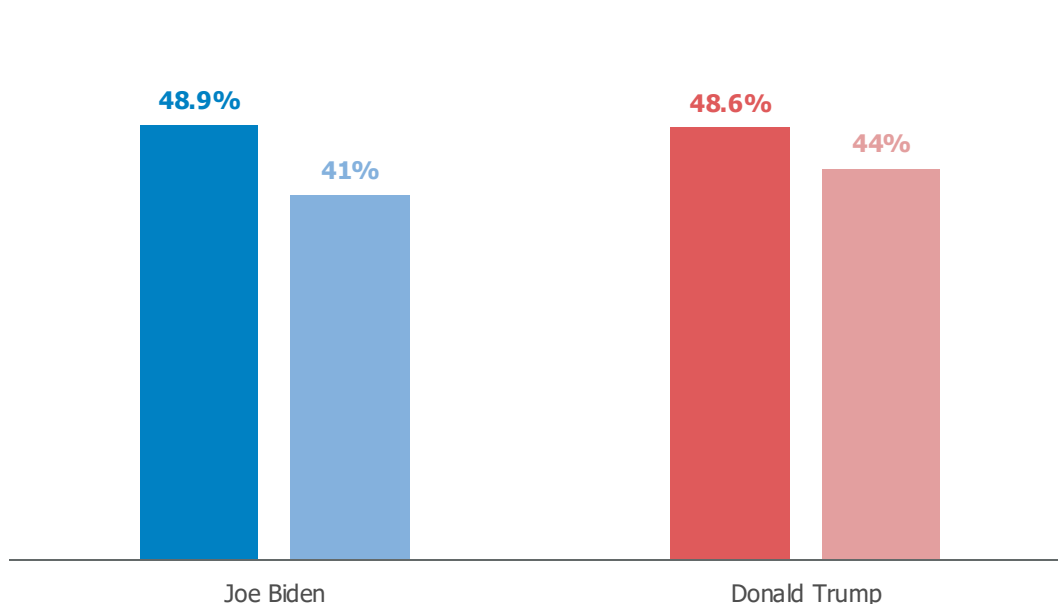
Reason Why Biden Dropped Out: 6 months from the election, both candidates were falling short of their 2020 totals – but Biden was falling harder

2020 Presidential Result vs June 2024 AZPOP

■ 2020 Actual Result ■ May 2024 AZPOP



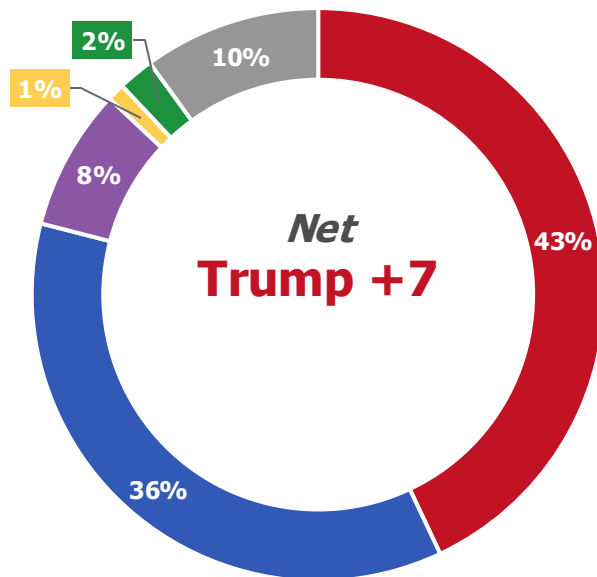
In May 2024, Joe Biden was securing only **84%** of his 2020 vote share



In May 2024, Donald Trump was holding on to **91%** of his 2020 vote share

Reason Why Biden Dropped Out: In a 5-way race, Biden's prospects worsened – Trump stayed about the same

2024 5-way Presidential Race



- Donald Trump
- Joe Biden
- Robert F Kennedy Jr
- Cornel West
- Jill Stein
- Not sure

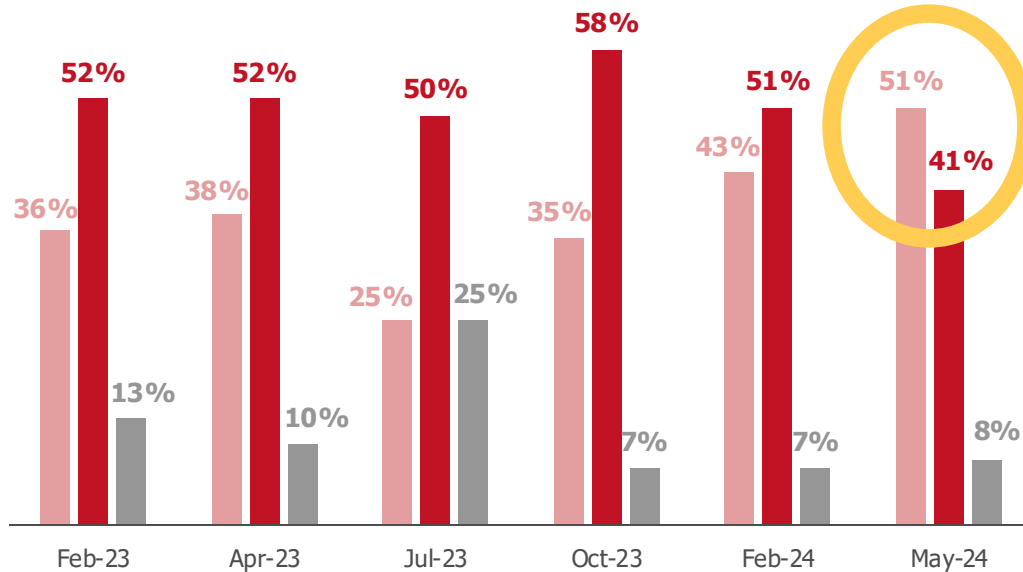
With the entrance of other names, Trump's support fell 1 point, Biden's fell 5.

- Biden's support was hurt especially among:
- Democrats: -7 points (84% -> 77%)
 - Independents: -9 points (34% -> 25%)
 - 18-34-year-olds: -8 points (43% -> 35%)

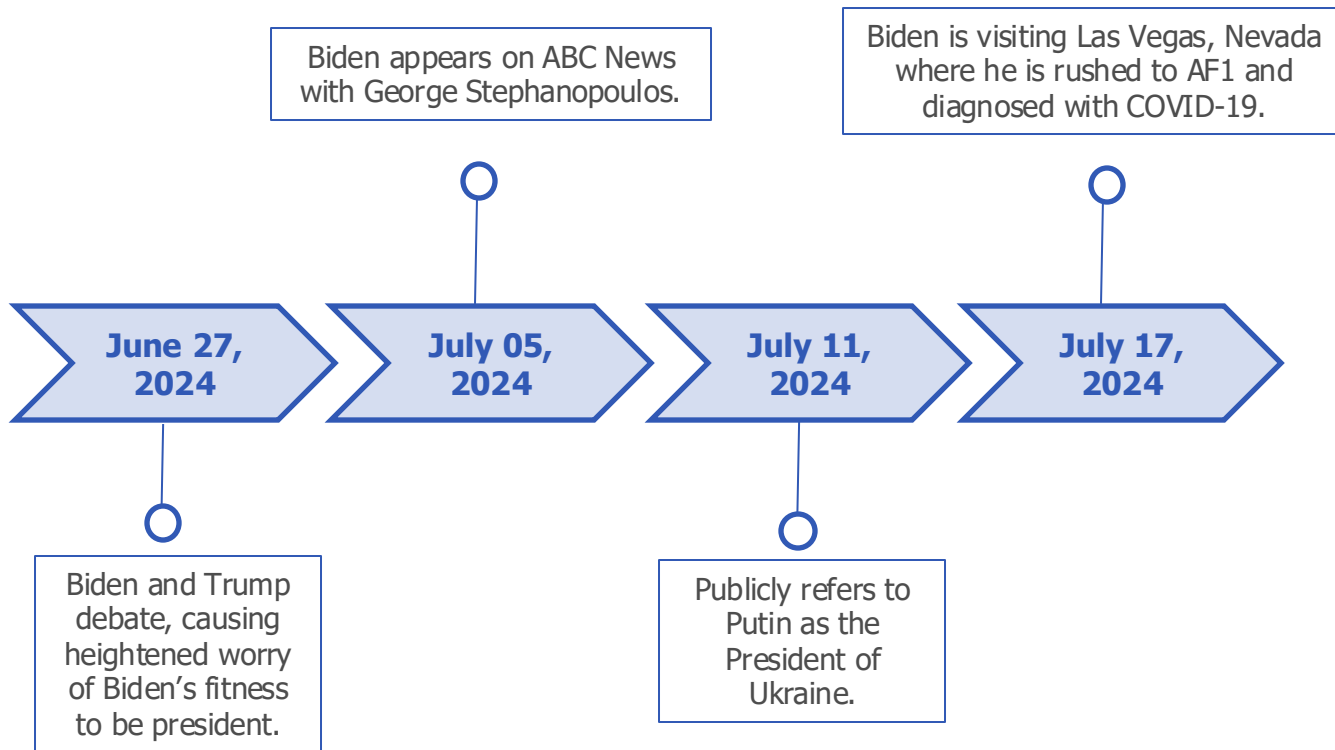
Reason Why Biden Dropped Out: Trump's capture of the Republican party looks complete

Trump/Party Loyalty

■ Supporter of Donald Trump ■ Supporter of the Republican Party ■ Both/Neither



And with Biden's mental fitness called into question after a series of back-to-back poor public appearances, his next step was clear.



On July 21, 2024 Joe Biden withdrew from the 2024 Presidential Election and endorsed his Vice President, Kamala Harris.

JOSEPH R. BIDEN, JR.

July 21, 2024

My Fellow Americans,

Over the past three and a half years, we have made great progress as a Nation.

Today, America has the strongest economy in the world. We've made historic investments in rebuilding our Nation, in lowering prescription drug costs for seniors, and in expanding affordable health care to a record number of Americans. We've provided critically needed care to a million veterans exposed to toxic substances. Passed the first gun safety law in 30 years. Appointed the first African American woman to the Supreme Court. And passed the most significant climate legislation in the history of the world. America has never been better positioned to lead than we are today.

I know none of this could have been done without you, the American people. Together, we overcame a once in a century pandemic and the worst economic crisis since the Great Depression. We've protected and preserved our Democracy. And we've revitalized and strengthened our alliances around the world.

It has been the greatest honor of my life to serve as your President. And while it has been my intention to seek reelection, I believe it is in the best interest of my party and the country for me to stand down and to focus solely on fulfilling my duties as President for the remainder of my term.

I will speak to the Nation later this week in more detail about my decision.

For now, let me express my deepest gratitude to all those who have worked so hard to see me reelected. I want to thank Vice President Kamala Harris for being an extraordinary partner in all this work. And let me express my heartfelt appreciation to the American people for the faith and trust you have placed in me.

I believe today what I always have: that there is nothing America can't do -- when we do it together. We just have to remember we are the United States of America.



10:46AM PST



Joe Biden @JoeBiden · Jul 21

My fellow Democrats, I have decided not to accept the nomination and to focus all my energies on my duties as President for the remainder of my term. My very first decision as the party nominee in 2020 was to pick Kamala Harris as my Vice President. And it's been the best

[Show more](#)



83K

201K

913K

118M



11:13 AM PST

Honeymoons are great, aren't they?

Excitement over Kamala Harris dims GOP's post-convention glow

– *NBC News*, 7/29/24

Kamala Harris has activated the Democratic big-money machine

– *Politico*, 7/30/24

'Swifties for Kamala' ready to speak in 2024 presidential election

– *ABC News*, 8/2/24

Kamala Harris Wipes Out Trump's Swing-State Lead in Election Dead Heat

– *Bloomberg*, 7/30/24

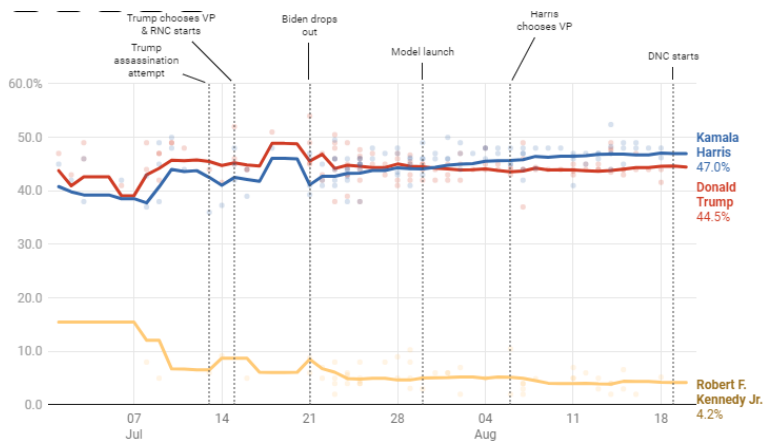
Harris' candidacy has led to surge in Black voter enthusiasm. It could make a difference in swing states.

– *ABC News*, 7/26/24

Kamala Harris Raises \$200 Million, Turning Enthusiasm Into Dollars

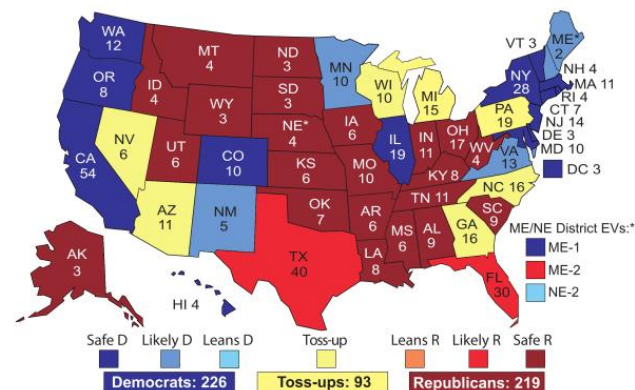
– *Bloomberg*, 7/29/24

The race is changing, but it is too early to tell if these shifts will last. We are still in the enthusiasm bubble.



- Sabato's Crystal Ball had few changes, but notably Georgia, a key state in this election, has shifted toward a toss up.

- Election forecaster Nate Silver's model has seen an increase in support for Kamala Harris over the past month.



*Two states, Maine and Nebraska, award electoral votes by congressional districts (all others are awarded winner-take-all statewide). Nebraska's two statewide electoral votes, and two of its three districts, are rated Safe Republican. Maine's statewide votes are rated Likely Democratic. The ratings for Maine's two districts, and Nebraska's one competitive district, are listed separately.
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Welcome to the upside-down world...

DDHQ/The Hill Post-Biden Drop Polling Shifts

Data as of 8/20/24 at 4:00PM PST

Geography	Pre-drop Poll Average	Post-drop Poll Average	Shift	Number of post-drop polls
National	Trump +2	Harris +3	Harris +5	126
Arizona	Trump +7	SPLIT	Harris +7	14
Georgia	Trump +7	Trump +3	Harris +4	15
Nevada	Trump +9	Trump +1	Harris +8	10
Michigan	Trump +2	Harris +2	Harris +4	14
Virginia	Harris +3	Harris +3	NONE	6
Pennsylvania	Trump +4	Harris +1	Harris +5	26
Wisconsin	Trump +1	Harris +3	Harris +4	18
North Carolina	Trump +10	SPLIT	Harris +10	7

Lots of questions right now, however, here are the questions you should be asking yourselves as we move forward:

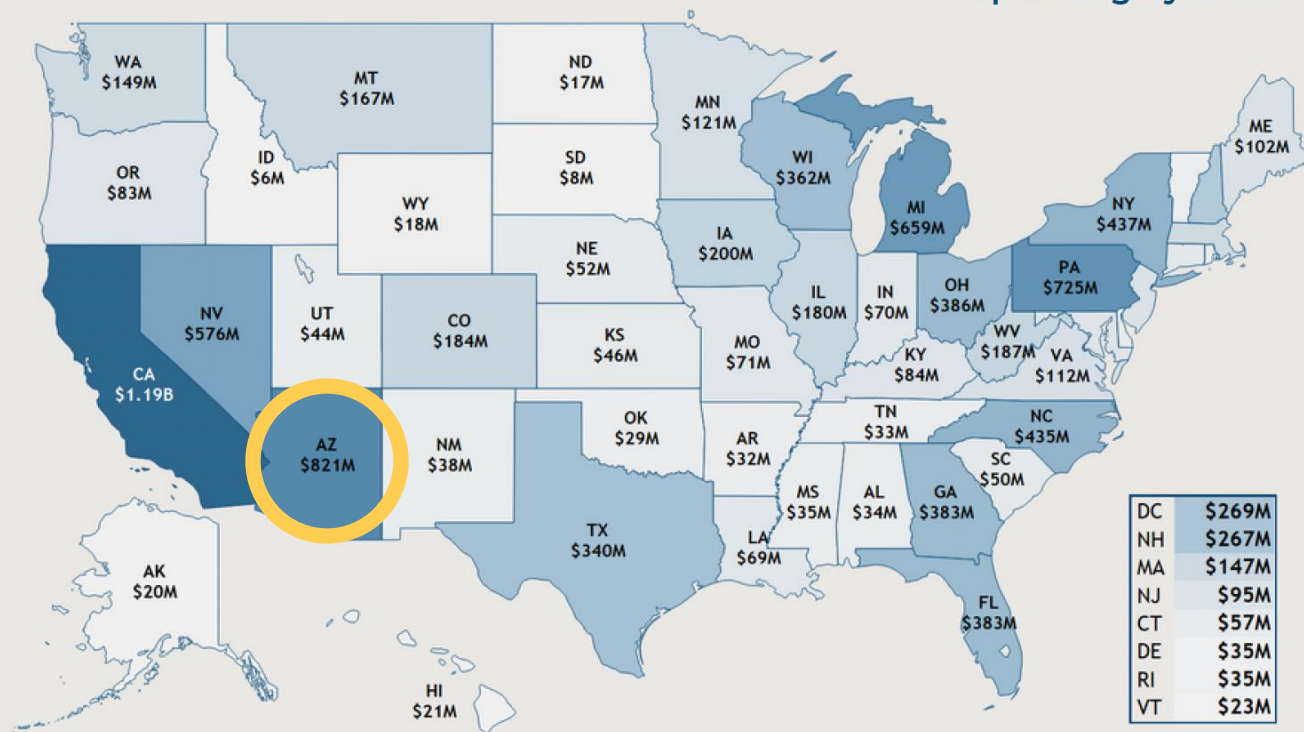
- Will Democrats remain united behind the Harris-Walz ticket?
- Now that Harris was selected as the nominee, will the issue of age go from a Republican advantage to a disadvantage?
- Democrats are bleeding among younger, Hispanic/Latino, African-American, and suburban women voters – Will this stop their movement toward Republicans and reverse course back to the Democrats?
- Is Tim Walz a good Vice-Presidential pick for the Harris campaign?
- How will Harris defend the administration's record, and how will she defend Biden's decline even though she didn't say anything about it?

**AZ = Ground Zero for
2024**

Making it Rain Benjamins in the Desert!!!

Spending Across the Map

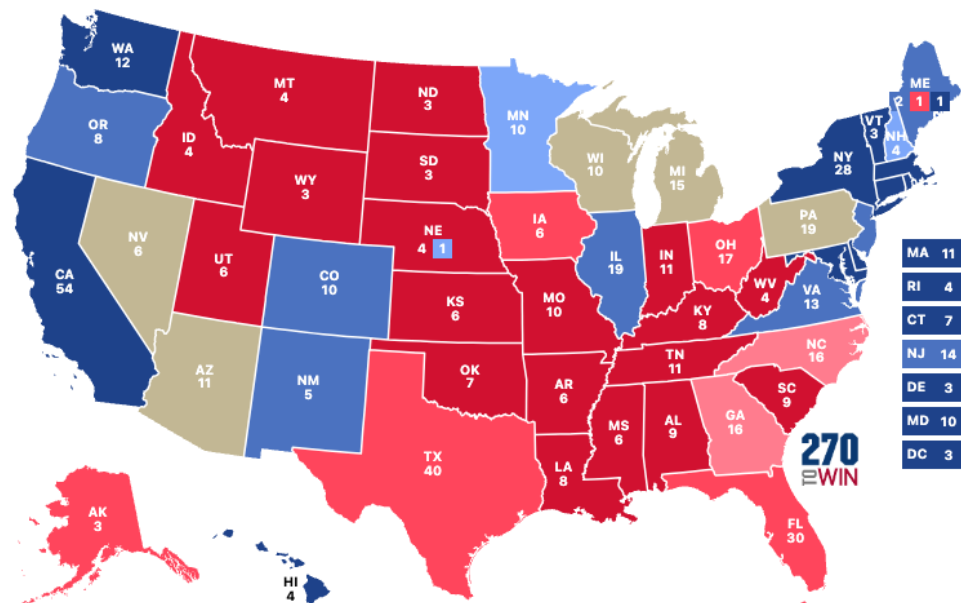
Figure 4: Projected Spending by State



\$821M

projected spend
in AZ – a **64% increase** from
the last election
cycle

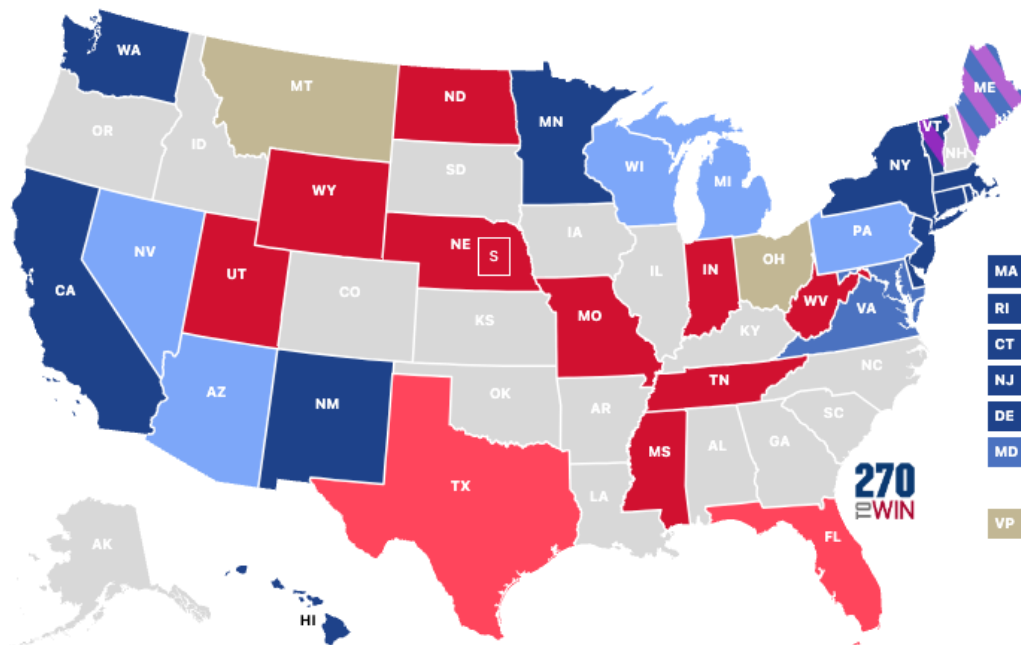
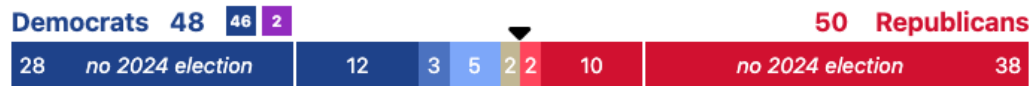
The road to the White House may very well lead through Arizona...



Map Updated: Aug. 5, 2024 at 12:01 UTC (8:01 AM EDT)

Forecaster	AZ Rating
Cook Political Report	Leans R
Sabato's Crystal Ball	Toss-Up
Inside Elections	Toss-Up
U.S. News	Toss-Up
Split Ticket	Toss-Up

... And control for the upper chamber in Washington



Map Updated: Jun. 19, 2024 at 14:46 UTC (10:46 AM EDT)

Forecaster	AZ Rating
Cook Political Report	Leans D
Sabato's Crystal Ball	Leans D
Inside Elections	Tilts D
U.S. News	Leans D
Split Ticket	Leans D

211 US House seats favor Republicans. 206 favor Democrats. 18 (and the majority) are up in the air

Republicans

TOSS-UP (9)	LEANS REPUBLICAN (9)	LIKELY REPUBLICAN (12)
Juan Ciscomani (AZ-6)	Ken Calvert (CA-41)	Kevin Kiley (CA-3)
David Schweikert (AZ-1)	Michelle Steel (CA-45)	Young Kim (CA-40)
John Duarte (CA-13)	CO-3 Open (Boebert)	CO-5 Open (Lamborn)
Mike Garcia (CA-27)	Zach Nunn (IA-3)	Anna Paulina Luna (FL-13)
David Valadao (CA-22)	John James (MI-10)	María Elvira Salazar (FL-27)
Don Bacon (NE-2)	Ryan Zinke (MT-1)	M. Miller-Meeks (IA-1)
Mike Lawler (NY-17)	Tom Kean Jr. (NJ-7)	Nick LaLota (NY-1)
Marc Molinaro (NY-19)	Scott Perry (PA-10)	Brian Fitzpatrick (PA-1)
L. Chavez-DeRemer (OR-5)	Jen Kiggans (VA-2)	Andy Ogles (TN-5)
		Monica De La Cruz (TX-15)
		Bryan Steil (WI-1)
		Derrick Van Orden (WI-3)

SAFE REPUBLICAN FLIPS (3)

NC-14 Open (Jackson)
NC-6 Open (Manning)
NC-13 Open (Nickel)

Total seats rated Safe Republican: 190

Total seats rated Safe, Likely, or Leans R: 211

Democrats

TOSS-UP (9)	LEANS DEMOCRATIC (15)	LIKELY DEMOCRATIC (17)
CA-47 Open (Porter)	Mary Peltola (AK-AL)	AL-2 Open (Moore)
Jared Golden (ME-2)	Yadira Caraveo (CO-8)	Josh Harder (CA-9)
MI-7 Open (Slotkin)	Jahana Hayes (CT-5)	Mike Levin (CA-49)
MI-8 Open (Kildee)	Frank Mrvan (IN-1)	Sharice Davids (KS-3)
Don Davis (NC-1)	Eric Sorensen (IL-17)	MD-6 Open (Trone)
Emilia Sykes (OH-13)	Angie Craig (MN-2)	Hillary Scholten (MI-3)
Matt Cartwright (PA-8)	Gabe Vasquez (NM-2)	NH-2 Open (Kuster)
Susan Wild (PA-7)	Anthony D'Esposito (NY-4)	Chris Pappas (NH-1)
M. Gluesenkamp Perez (WA-3)	Pat Ryan (NY-18)	NJ-3 Open (Kim)
	Brandon Williams (NY-22)	Susie Lee (NV-3)
	Marcy Kaptur (OH-9)	Steven Horsford (NV-4)
	Chris Deluzio (PA-17)	Dina Titus (NV-1)
	Henry Cuellar (TX-28)	Tom Suozzi (NY-3)
	Vicente Gonzalez (TX-34)	Greg Landsman (OH-1)
	VA-7 Open (Spanberger)	Val Hoyle (OR-4)
		Andrea Salinas (OR-6)
		Kim Schrier (WA-8)

SAFE DEMOCRATIC FLIP (1)

Garret Graves (LA-6)

Total seats rated Safe Democratic: 174

Total seats rated Safe, Likely, or Leans D: 206

211 US House seats favor Republicans. 206 favor Democrats. 18 (and the majority) are up in the air

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SAFE DEMOCRATIC FLIP (1)		
Garret Graves (LA-6)		

Total seats rated Safe Democratic: 174

Total seats rated Safe, Likely, or Leans D: 206

Republicans in CD1 and CD6 will likely need crossover Biden (err., Democrat) voters to win reelection...signs say that might be possible again

Generic Congressional Ballot by 2024 Presidential Preference

■ The Republican candidate ■ The Democratic candidate



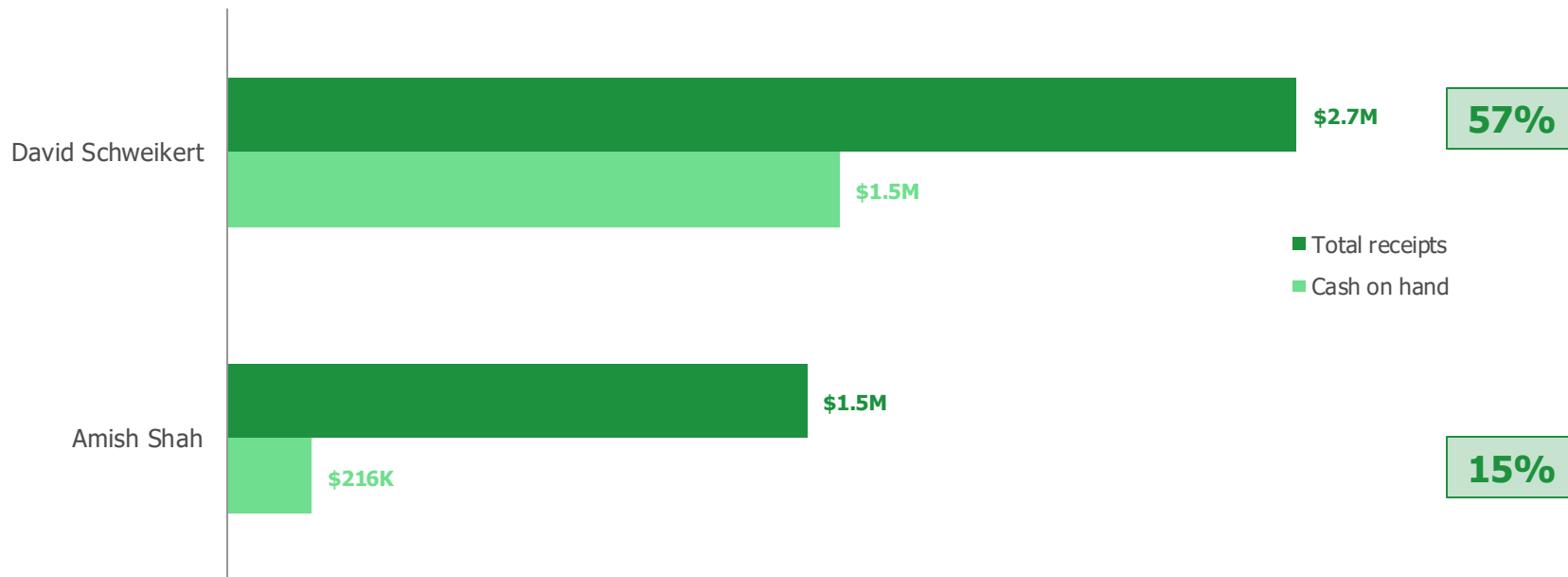
CD1	Election Result
2020 Pres.	D+2
2022 House	R+0.8

CD6	Election Result
2020 Pres.	D+0.4
2022 House	R+1.4

Schweikert is heavily outspending his competition.

Financial State of AZ 01 Race

% of cash remaining

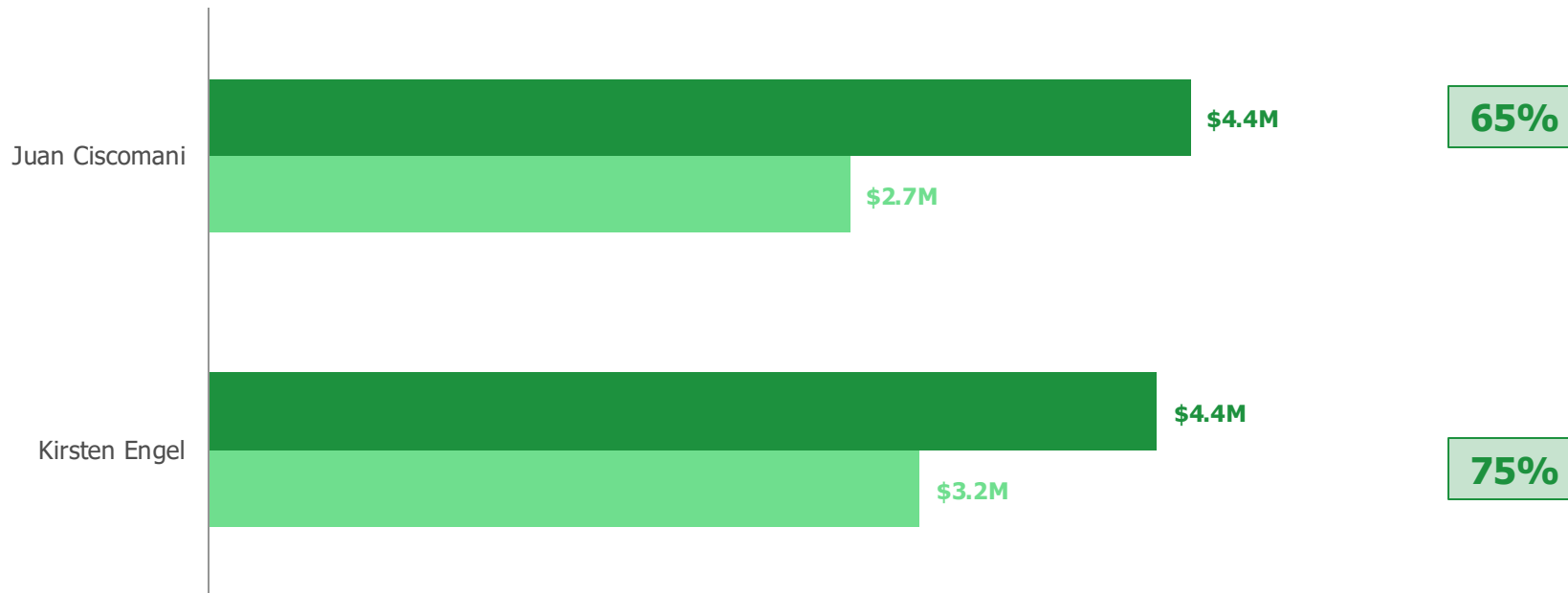


Meanwhile, the Congressional District 06 race is still a tossup, with no clear leader in spending

Financial State of AZ 06 Race

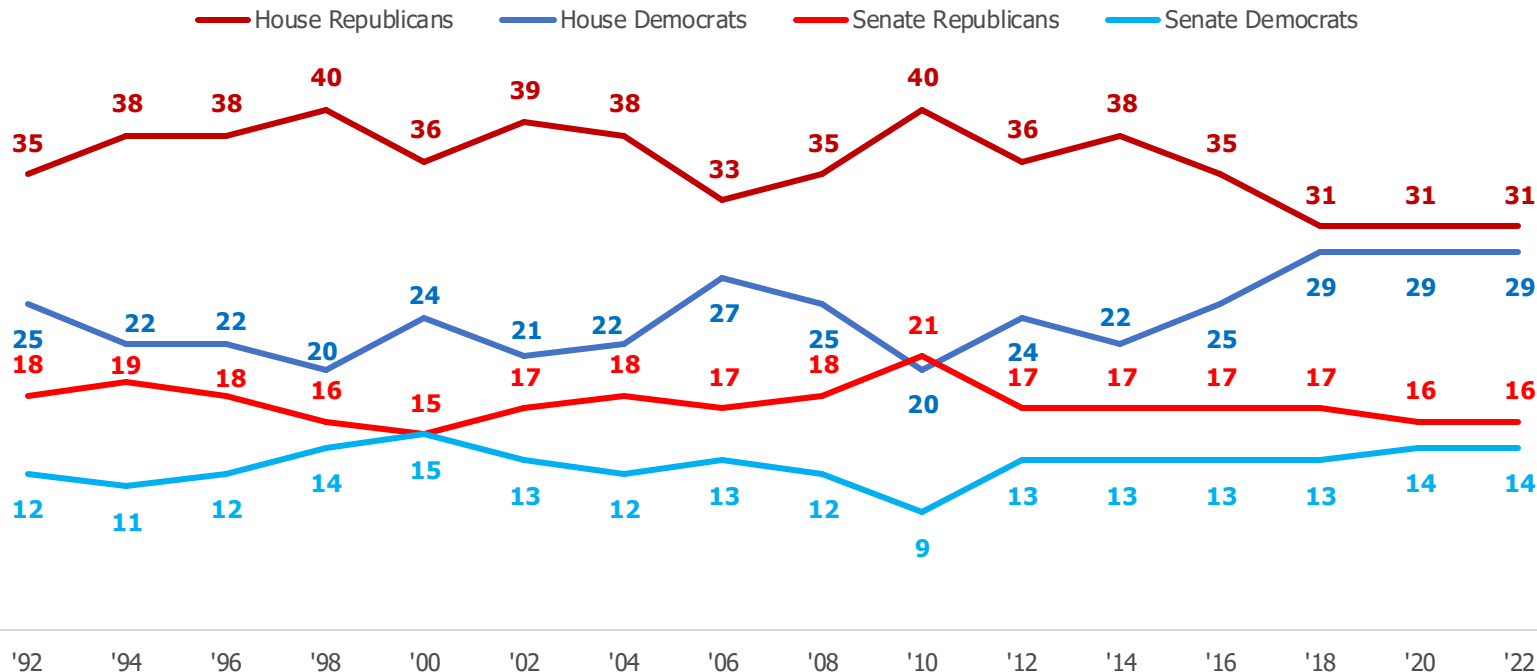
% of cash remaining

■ Total Raised ■ Cash on Hand



Following the GOP's wide advantage in 2016, control of Arizona's State Legislature has continued to come down to a razor's edge ever since

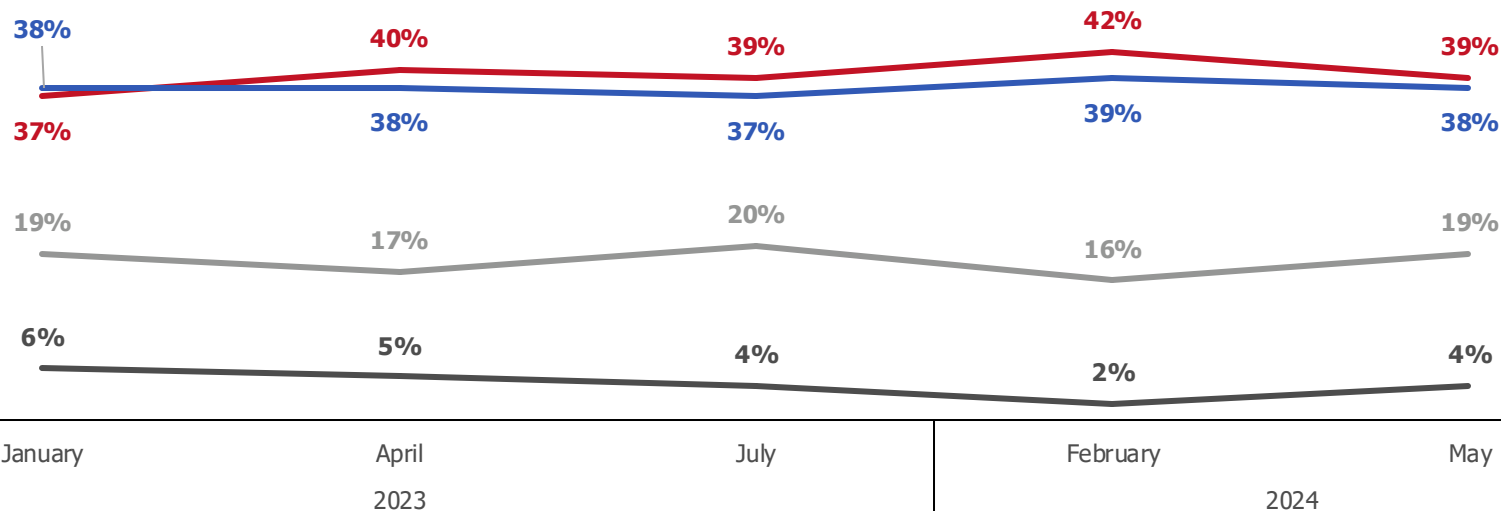
Control of AZ State Legislature



Generically, voters in the state have leaned Republican since the last election

Generic Congressional Ballot

— The Republican candidate — The Democratic candidate — Not sure — Other



Competitive Legislative Districts

Split Decision on MAGA v. Mainstream – LDs 1 & 7 opt for Trumpy-er candidates, 16 & 17 prioritize pragmatists

LD	Candidate	Result
1 - SEN	Ken Bennet (inc.) <i>Cautious, old-style conservative</i>	33%
	Mark Finchem <i>MAGA, election denialist</i>	48%
	Steve Zipperman	18%
7- SEN	Wendy Rogers (inc.) <i>MAGA candidate who has deep pockets, fundraising from past runs</i>	55%
	David Cook <i>Prizes effectiveness, has ties to local industries, long relationships</i>	45%
16- House	Teresa Martinez (inc.)	30%
	Chris Lopez <i>More moderate, running alongside Martinez</i>	27%
	Rob Hudelson <i>Lost the right-leaning seat to a Democrat in 2022, painted as too extreme for the district</i>	27%
	Gabby Mercer <i>America First, MAGA type</i>	16%
17-SEN	Justine Wadsack (inc.) <i>MAGA challenger who unseated Leach but posted a mediocre margin in 2022</i>	48%
	Vince Leach <i>Not as conservative as Wadsack, seems more electable</i>	52%

Ballot Props

The year of the Arizona ballot measure

11

Confirmed Ballot Measures

32

**Measures That Didn't
Make It To The Ballot**

SIGNATURE DEADLINE: July 3rd, 2024

The confirmed measures vary from criminal justice, election reform, and taxation...

Name	Description
Criminal Conviction Fee for First Responder Death Financial Benefit Measure	Establishes a \$20 fee on every conviction for a criminal offense, which would go to pay a benefit of \$250,000 to the spouse or children of a first responder who is killed in the line of duty.
Emergency Declarations Amendment	Provides the legislature with powers to terminate a state of emergency, alter the emergency powers of a governor during an emergency, and automatically terminate the state of emergency after 30 days unless the governor is granted the powers by the legislature EXCEPT in times of war, fires, or floods.
Life Imprisonment for Sex Trafficking of a Child Measure	Life imprisonment for an individual who is convicted of sex trafficking a child.
Property Tax Refund for Non-Enforcement of Public Nuisance Laws Measure	Allow property owners to apply for a property tax refund in cities and localities where laws such as loitering, illegal camping, and many others are not enforced.
Require Partisan Primaries Amendment	Requires partisan primaries, prohibits candidates from running in the same primary election (top-two, top-four, etc.), and ensures state law supersedes local charters.
Signature Distribution Requirement for Initiatives Amendment	Create a signature distribution requirement: 10% of votes cast for governor needed to initiate state statutes, and 15% of votes cast for governor for initiated constitutional amendments.

As well as judicial term limits, wage laws, and immigration.

Name	Description
Legal Challenges to Constitutionality of Initiatives Amendment	Provide for challenges to an initiative measure or constitutional amendment after the filing of the measure with the secretary of state
End Term Limits and Retention Elections for Supreme Court Justices and Superior Court Judges Amendment	End term limits for state supreme court justices and superior court judges, replacing them with terms of good behavior, unless decided otherwise by a judicial review commission, and would end retention elections at the end of the judicial term, providing for retention elections under certain circumstances
Wages for Tipped Workers Amendment	Allow for tipped workers to be paid 25% less per hour than the minimum wage if any tips received by the employee were not less than the minimum wage plus \$2 for all hours worked
Immigration and Border Law Enforcement Measure	Allow for state and local police to arrest noncitizens who cross the border unlawfully, allow for state judges to order deportations, require the use of the e-verify program for some public governmental programs and employment eligibility purposes, and make the sale of fentanyl a Class 2 felony if a person knowingly sells fentanyl resulting in the death of another person
Legislative Ratification of State Agency Rules that Increase Regulatory Costs Measure	Prohibit a proposed rule from becoming effective if that rule is estimated to increase regulatory costs by more than \$500,000 within five years after implementation, until the legislature enacts legislation ratifying the proposed rule

Rain, Rain, Come This Way

The politics of water in a desert

Voters are concerned about the water issues facing AZ

75%

*Share of likely voters who believe the State of **Arizona won't have enough water** for residents, agriculture, industry, and other businesses for the next 100 years.*

73%

*Share of likely voters who believe that our elected **statewide and legislative leaders** are **not delivering results** necessary to protect Arizona's water future*

64%

*Share of likely voters who believe the current **water issues** facing the state of Arizona are a **major crisis/serious issue**.*



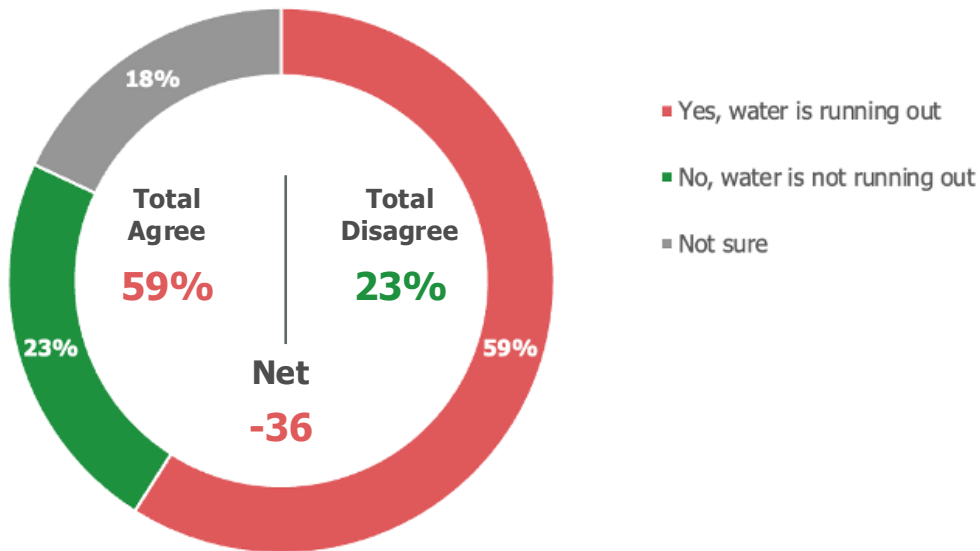
Source: Water for Arizona

The results are based on a statewide public opinion survey of 500 likely Arizona voters conducted by HighGround Public Affairs. The survey of likely Arizona voters is balanced across age, party, and regional demographics to reflect 2022 turnout. The survey was conducted between April 5-17, 2023 by professional live interviewers calling on landlines and cell phones. The 500 sample has a margin of error of $\pm 4.36\%$ with a 95% confidence interval.

Voters say water is running out

- The media – specifically The New York Times – impacts the perceptions of Arizona voters.
- Voters who say they get their news from The New York Times on a daily basis are more likely to believe Arizona is running out of water (76%) than daily consumers of any other new source.

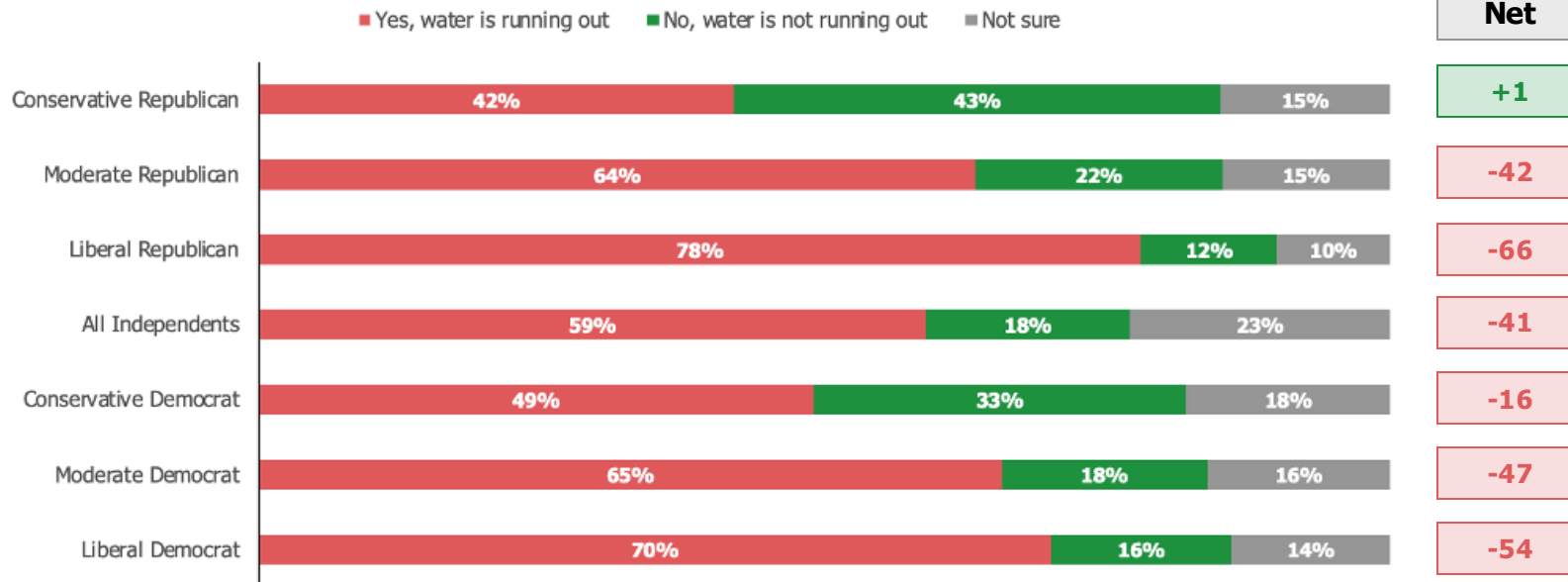
Do you believe that Arizona is running out of water?



February 2024 – Q) Do you believe that Arizona is running out of water? (n=1002 registered voters)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Water is a partisan and ideological issue

Opinion on Arizona's Water Supply by Political ideology



Recent Water-Related Legislative History

Bill	Summary	Senate Vote	House Vote	Status
SB1081 (6/2024)	<i>Created pathway for agricultural water users and the City of Buckeye to collaborate in utilizing renewable, sustainable surface water and recycled water sources for future development, reducing the reliance on groundwater pumping to protect aquifers in the West Valley.</i>	19-9 R: 16-0 D: 3-9	38-20 R: 29-0 D: 9-20	Passed + Signed by Gov
SB1181 (6/2024)	<i>Provided a smooth transition for communities and water providers who are taking steps to achieve the sustainability of a 100-year Assured Water Supply Designation, protecting ratepayers and enabling continued investments in critical infrastructure and renewable water supplies</i>	25-4 R: 15-0 D: 10-4	35-22 R: 26-3 D: 9-19	Passed + Signed by Gov
SB1242 (6/2024)	<i>Promoted access to backup water supplies in the Harquahala groundwater basin that can be used to support the water portfolios in Arizona's metropolitan areas, and offset groundwater pumping in the Active Management Areas.</i>	21-5 R: 13-0 D: 8-5	38-21 R: 30-0 D: 8-21	Passed + Signed by Gov



NOBLE
PREDICTIVE INSIGHTS

Thank You

PHOENIX

602-641-6565
m.noble@npredictive.com

5310 E. HIGH ST, #340
PHOENIX, AZ 85054

Research Methodology

This poll was conducted by Noble Predictive Insights from May 7 - May 14, 2024 and surveyed Arizona registered voters via opt-in online panel. The sample included 1,003 registered voters and 903 likely 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 +/- 3.26% for likely voters and +/- 3.09% for registered voters.

Sample sizes in slide footnotes reflect unweighted sample sizes, unless otherwise noted.

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	31%
Independent	34%
Republican	34%

Ethnicity Combined	
White, non-Hispanic	62%
Hispanic/Latino	22%
Other	15%

Gender	
Male	47%
Female	53%

Age	
18-34	26%
35-44	15%
45-54	16%
55-64	16%
65+	26%

**Want to know more
about NPI?**

**WHY TRUST NOBLE
PREDICTIVE INSIGHTS?**

With NPI, you gain a strategic research partner with a proven track record for accuracy.

Our research is hyper-focused on impact, promising precision data and predictive insights to guide your strategies with ***confidence***. Our strategic research, trusted data, and actionable insights provide data-based solutions that pave the way for success.

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*answers.***



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- ▶ **Political Climate Updates**
- ▶ **Ballot Tracking**
- ▶ **Trend Analysis**
- ▶ **Consulting**



CHOOSE FROM:

- ▶ **Monthly**
- ▶ **Bi-Monthly**
- ▶ **Quarterly**
- ▶ **Bi-Annually**



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BEST FOR:

- ▶ **Post-Election Analysis**
- ▶ **Special Interest**
- ▶ **Annual Company Meetings**



Market Research Services

CONCEPT/MESSAGE TESTING

PRE-POST ADVERTISING CAMPAIGN ANALYSIS

EMPLOYEE SURVEYS

FOCUS GROUPS

BRAND TRACKING STUDIES

IN-DEPTH INTERVIEWS

CUSTOMER PROFILING & SEGMENTATION

ETHNOGRAPHIES

BRAND EQUITY SOLUTIONS

BRAND HEALTH STUDIES

All services can be customized to your business needs and learning objectives

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POLITICAL AFFAIRS SURVEYS

BRUSHFIRE SURVEYS

EARLY VOTING / BALLOT TRACKING

BASELINE PUBLIC OPINION SURVEY

STATEWIDE PUBLIC OPINION PULSE (POP) SURVEYS

QUALITATIVE PUBLIC OPINION

FOCUS GROUPS

INTERCEPT SURVEYS

Data Analysis

POLITICAL ANALYTICS

VOTER DATA ACQUISITION

POLL PROCESSING

DATA SCIENCE

CUSTOMER SEGMENTATION

STATISTICAL ANALYSIS

DATA VISUALIZATIONS

DASHBOARD

PRECINCT MAPPING



All services can be customized to your business needs and learning objectives

SOME OF OUR PUBLIC AFFAIRS CLIENTS



NEVADA POLICY
Research Institute



ARIZONA DEPARTMENT OF
EDUCATION



Kennecott



WE ARE A NATIONALLY ACCREDITED RESEARCH FIRM

DON'T TAKE OUR WORD FOR IT, JUST ASK THESE GUYS



BEST POLLSTER



BEST NON-PARTISAN AZ POLLSTER

"pre-eminent pollster in the Southwest"



"Phoenix public-opinion expert" *The New York Times*



The most and least accurate pollster of 2021-22

Average error, share of elections "called" correctly, and average statistical bias of pollsters in the final 21 days* before Senate, House, and gubernatorial general elections in the 2021-22 cycle, for pollsters that conducted at least 5 such polls

Accuracy

POLLSTER*	# OF POLLS†	AVERAGE ERROR‡	% OF CORRECT CALLS‡	AVERAGE BIAS‡
11. OH Predictive Insights	5	3.4	60	D+0.3

Lowest Average Bias

POLLSTER*	# OF POLLS†	AVERAGE ERROR‡	% OF CORRECT CALLS‡	AVERAGE BIAS‡
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"one of the state's most respected polling organizations"



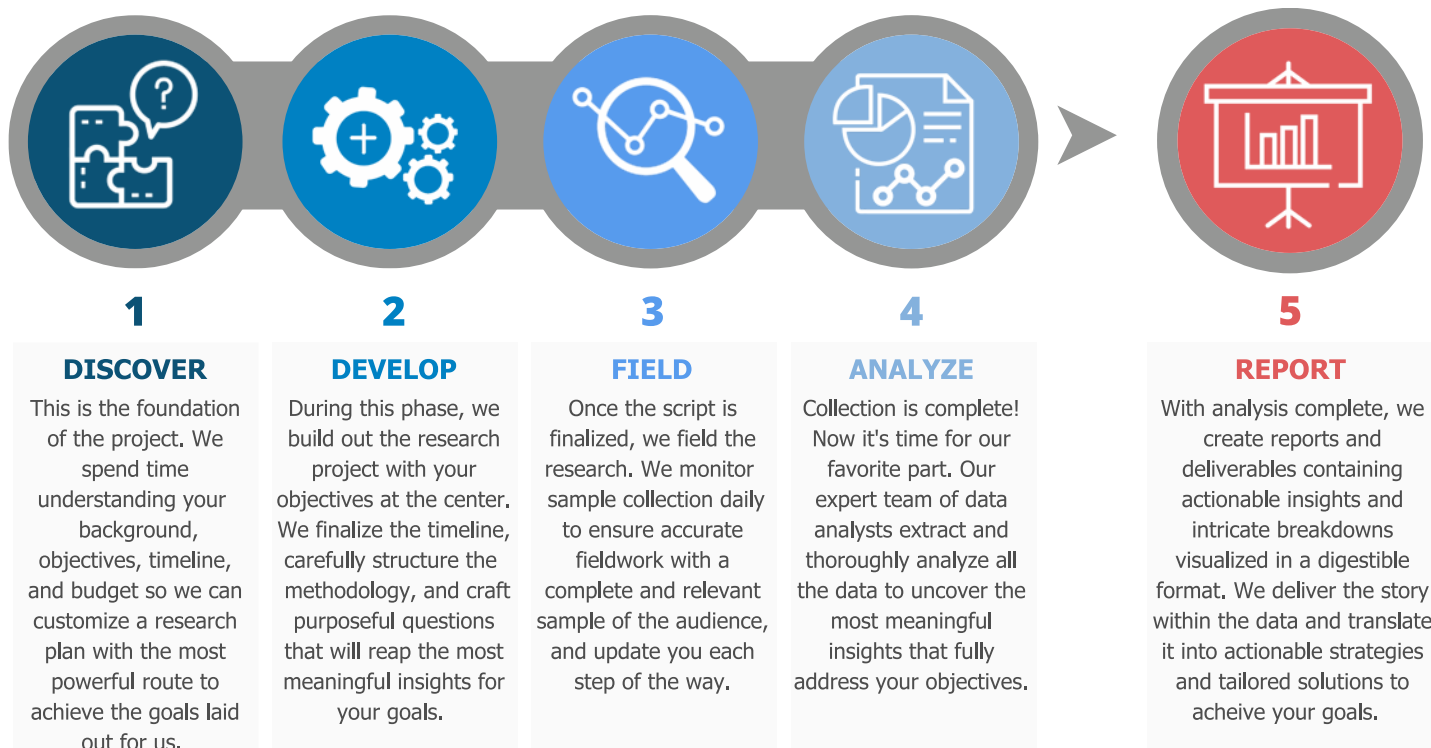
THE WALL STREET JOURNAL



POLITICO



Our Proven Process



Toplines, Crosstabs and Methodology.

Issue polling listed here. For tracking questions –generic ballot, presidential approval, 2024 primary and general election horse race – see [here](#).

TOPLINES

From the following list, please select the top three issues that you would say are the most important issues facing the country.

Inflation/price increases	44%
Economy/jobs	23%
National debt/government spending	16%
Illegal immigration	25%
Abortion rights	20%
Climate change	25%
High taxes	12%
Voting rights	11%
Crime/violence	27%
Government censorship	4%
Weaponization of the Justice Department	8%
Learning loss/failing public schools	6%
Government corruption	19%
Health care access	17%
National security	10%
'Woke' government policies	13%
Race relations	9%
Other	4%
Unsure	1%

Politically, which of these terms comes closer to how you see yourself, even if both apply to you? Among Republicans.

Supporter of Donald Trump	35%
Supporter of the Republican Party	56%
Neither	9%

For each of the following words and phrases, please indicate your perception of how well they describe Joe Biden. Use the scale below to select your response for each attribute.

- Cares about people like you

CROSSTABS

Breakdown by gender, age, party, education, race/ethnicity and household income.

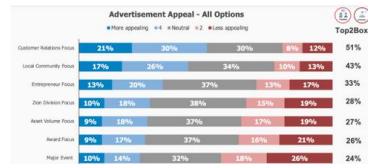
From the following list, please select the top three issues that you would say are the most important issues facing the country.

	Inflation/price increases	Economy/jobs	National debt/government spending	Illegal immigration	Abortion rights	Climate change	High taxes	Voting rights
Male	44%	26%	18%	29%	15%	22%	13%	11%
Female	45%	21%	15%	20%	23%	27%	11%	10%
18-34	45%	24%	14%	10%	26%	22%	17%	5%
35-44	46%	31%	15%	15%	20%	26%	15%	11%
45-54	49%	30%	12%	20%	20%	19%	15%	7%
55-64	42%	20%	16%	31%	16%	23%	11%	11%
65+	41%	16%	21%	36%	20%	29%	7%	16%
Republicans	50%	25%	22%	42%	7%	8%	14%	3%
Democrats	40%	20%	7%	8%	35%	44%	10%	20%
Independent	40%	26%	21%	22%	18%	20%	14%	7%
HS or less	50%	23%	13%	26%	17%	19%	14%	7%
Some college	47%	21%	17%	27%	18%	22%	12%	8%
Bachelor's degree	42%	26%	16%	23%	22%	27%	12%	11%
Post-grad	33%	22%	19%	20%	28%	35%	11%	21%
White	45%	22%	18%	28%	20%	26%	11%	10%
Hispanic	50%	24%	11%	17%	15%	24%	17%	6%
Black	37%	25%	7%	10%	26%	16%	15%	21%
Other	45%	28%	15%	18%	16%	28%	15%	9%
Under \$50k	49%	23%	13%	23%	18%	23%	12%	9%
\$50k to \$100k	44%	25%	14%	25%	19%	24%	13%	11%
\$100k or more	39%	21%	20%	26%	24%	28%	12%	13%

	Crime/violence	Government censorship	Weaponization of the Justice Department	Learning loss/failing public schools	Government corruption	Health care access	National security
Male	26%	4%	11%	5%	18%	13%	10%
Female	28%	5%	6%	7%	20%	21%	9%
18-34	25%	4%	6%	11%	18%	22%	6%
35-44	26%	6%	6%	9%	16%	20%	6%
45-54	28%	4%	9%	5%	21%	18%	8%
55-64	26%	4%	10%	4%	21%	17%	14%

Executive Summary

Key Takeaway: Most Maricopa professionals are not interested in seeing ads at sporting events, they also noted that the awards a bank has earned do not have a pull factor. However, they are drawn to an emphasis on customer service.

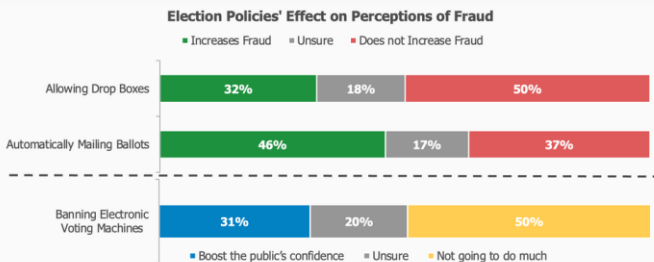


- An ad that runs during a sporting event or other significant public affairs was the least appealing across the board.
 - 44% of participants found it less appealing, 32% found it neutral, and 24% thought it appealing
 - 16% of 65+ vs. 33% of 21-34 y/o
 - 28% of those who see themselves as entrepreneurs found it appealing
- An ad focusing on awards [Client] has won is considered neutral or negative among professionals.
 - When participants were asked for reasons as to why they became customers at their respective banks, only 6% selected awards as a reason.
 - 37% of participants found it less appealing, 37% found it neutral, and only 26% found it appealing
 - 33% of 21-34 y/o vs. 12% of 65+ found awards appealing
 - 31% of Entrepreneurs find it appealing vs. 46% of entrepreneurs who find it less appealing
- Conversely, Maricopa professionals care about how [Client] emphasizes its approach to customer relations.
 - 51% of total participants found it appealing
 - 62% of 55-64
 - 54% of 21-34 y/o
 - Across education levels, customer relations are a top point of appeal.
 - 53% of those HS or less and 52% of post-grads find it appealing
 - Entrepreneur or not, customer relations are essential
 - 53% of entrepreneurs and 50% of non-entrepreneurs found it appealing



Miles Noble, Founder & CEO
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Voters aren't worried about letting voters drop ballots off in drop boxes, less certain about automatically sending ballots to all voters or banning voting machines

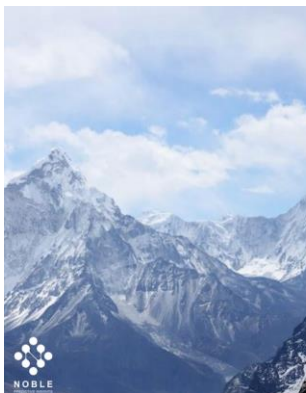


Q) Which of the following statements comes closest to your view about Nevada's current practice of sending a ballot to every active registered voter in Nevada by mail, even if neither is exactly right? Q) Which of the following statements comes closest to your view about allowing Nevadans who are sent mail-in ballots to drop them off at drop boxes, instead of mailing them back or dropping them off at a polling place? Q) Which of the following statements comes closest to your view about Nevada's use of electronic voting machines, even if neither is exactly right? (n=600)
* Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Key Takeaways & Actionable Insights

- Respondents have a high favorability of both organizations, Arizona for Better Medicaid and the Arizona Division for Developmental Disabilities.
- Although favorability is high with DDD, many respondents had some type of trouble accessing services.
- The support for Medicaid Managed Care increased after hearing messaging facts.

- By addressing the issues respondents had accessing services will increase favorability for DDD, and in turn can increase support for Medicaid Managed Care
- Leveraging the most resonating messages to target the demographics of the "Initial Opposers" group will increase support



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