CivEx: 2024 Election Preview & Arizona Political Climate Update

May 2024
Noble Predictive Insights
A Nationally Accredited Research Firm

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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.

NPI collectively brings over 50 years of survey research experience in public policy, government, and corporate arenas to the table. We are a thought leader on public opinion led by Founder & CEO Mike Noble who is regarded as "a preeminent pollster in the Southwest."

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
- AZ = Ground Zero for 2024
- State of the State
- 2024 Election
- The House
- The Israel-Hamas War
- The Abortion Question

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
Pre-2018 Elected Official Party Affiliation

John McCain
US Senator

Jeff Flake
US Senator

Doug Ducey
Governor

Michele Reagan
Secretary of State

Mark Brnovich
Attorney General

Joe Hart
Mine Inspector

Diane Douglas

Jeff DeWit
Treasurer

Source: Arizona Secretary of State, Date Accessed: 9/18/2023
2022 Post-Midterm Elected Official Party Affiliation

- **U.S. Senate**
  - **Kyrsten Sinema** (D)
  - **Mark Kelly** (R)

- **U.S. House**
  - **Rep. Tom Horne** (R)

- **State Senate**
  - **Adrian Fontes** (D)
  - **Paul Marsh** (R)

- **State House**
  - **Kimberly Yee** (R)
  - **Treasurer**
  - **Secretary of State**
  - **Attorney General**
  - **Supt. of Pub. Instr.**
  - **Mine Inspector**
  - **AZ Corporation Commission**
  - **Tom Horne** (R)

- **Governor**
  - **Katie Hobbs** (D)

Source: Arizona Secretary of State, Date Accessed: 8/24/2021
AZ = Ground Zero for 2024
Making it Rain Benjamins in the Desert!!!
The road to the White House may very well lead through Arizona...
... And control for the upper chamber in Washington

Source: 270towin
Date Accessed: 5/10/24
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.

Source: Arizona Secretary of State’s Office
Data as of 12/1/2022
Battlegrounds: three key Phoenix districts

LD-13
House: SPLIT
Senate: R
Biden+3

LD-2
House: SPLIT
Senate: R
Trump+2

LD-4
House: SPLIT
Senate: D
Biden+1

Source: Arizona IRC, AZ State Leg
Data as of 3/22/2024
One more key Maricopa district – and two that stretch to Pima

```
LD-17
House: 2 R
Senate: R
Trump+4
```

```
LD-16
House: SPLIT
Senate: R
Trump+4
```

Source: Arizona IRC, AZ State Leg
Data as of 3/22/2024
The year of the Arizona ballot measure.

Confirmed Ballot Measures: 6

Potential Ballot Measures: 38

SIGNATURE DEADLINE: July 3rd, 2024

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criminal Conviction Fee for First Responder Death Financial Benefit Measure</td>
<td>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.</td>
</tr>
<tr>
<td>Emergency Declarations Amendment</td>
<td>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.</td>
</tr>
<tr>
<td>Life Imprisonment for Sex Trafficking of a Child Measure</td>
<td>Life imprisonment for an individual who is convicted of sex trafficking a child.</td>
</tr>
<tr>
<td>Property Tax Refund for Non-Enforcement of Public Nuisance Laws Measure</td>
<td>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.</td>
</tr>
<tr>
<td>Require Partisan Primaries Amendment</td>
<td>Requires partisan primaries, prohibits candidates from running in the same primary election (top-two, top-four, etc.), and ensures state law supersedes local charters.</td>
</tr>
<tr>
<td>Signature Distribution Requirement for Initiatives Amendment</td>
<td>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.</td>
</tr>
</tbody>
</table>

And potential measures aim to change many different policies or laws.
State of the State

Voter opinion regarding the political environment in Arizona
Joe Biden’s approval rating reaches the highest point in more than 2 years

Q) Do you approve or disapprove of the way President _____ is handling his job? (n=1002 registered voters)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Voters still unhappy with the direction Arizona is headed, but trending upward

**Trajectory of Arizona**

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

Q) Do you believe that Arizona is on the right track or heading in the wrong direction? (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Arizona voters are beginning to come around to Governor Katie Hobbs

Q) Do you approve or disapprove of the way Governor Katie Hobbs is handling her job? (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Governor Katie Hobbs is in a stronger position with voters than the state legislature

Q) When it comes to Arizona Governor Katie Hobbs, what is your approval of the job she is doing so far?
Q) When it comes to the Arizona State Legislature, what is your approval of the job they have done so far? (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Inflation and Immigration dominate the concerns of most Arizona voters

Q) Here is a list of some issues facing Arizona. Please select the top three issues you would say are the most important and rank them on a scale of 1-3. (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
For Republicans, the top issues are immigration and inflation, by a landslide. The same is true of GOP base demographics.

Q) Here is a list of some issues facing Arizona. Please select the top three issues you would say are the most important and rank them on a scale of 1-3. (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Democrats care about healthcare, inflation, and abortion the most – but, unlike the GOP, no runaway top issues. Democratic voters are spread across issues.

### Top 3 Issues among Democrats

<table>
<thead>
<tr>
<th>Issue</th>
<th>Ages 18-34</th>
<th>College/Post-grads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inflation</td>
<td>49%</td>
<td>57%/46%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>32%</td>
<td>34% and Education</td>
</tr>
<tr>
<td>Education</td>
<td>31%</td>
<td>(35%)</td>
</tr>
<tr>
<td>Inflation</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Abortion</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Immigration</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Gun Polices</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Climate Change</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Unemployment</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Income Gap</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Taxes</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>National Defense</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>LGBT Rights</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Something Else</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Not Sure</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>

Q) Here is a list of some issues facing Arizona. Please select the top three issues you would say are the most important and rank them on a scale of 1-3. (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Independents are split—worried most about inflation and immigration (two GOP focuses) with some concern for Dem. issues (healthcare, climate, educ., abortion).

Q) Here is a list of some issues facing Arizona. Please select the top three issues you would say are the most important and rank them on a scale of 1-3. (n=1002 registered voters)

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

### Top 3 Issues among Independents

<table>
<thead>
<tr>
<th>Hispanic/Latinos</th>
<th>Moderates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inflation (53%)</td>
<td>Inflation (53%)</td>
</tr>
<tr>
<td>Immigration (37%)</td>
<td>Immigration (48%)</td>
</tr>
<tr>
<td>Unemployment (27%)</td>
<td>Healthcare (30%)</td>
</tr>
</tbody>
</table>

- **Inflation**: 62%
- **Immigration**: 51%
- **Healthcare**: 28%
- **Climate Change**: 26%
- **Education**: 25%
- **Abortion**: 22%
- **Taxes**: 19%
- **Gun Policies**: 15%
- **Unemployment**: 15%
- **Income Gap**: 14%
- **Something Else**: 9%
- **National Defense**: 7%
- **LGBT Rights**: 5%
- **Not Sure**: 2%
2024 Election

Ground is ripe for Republicans; will they squander it?
At the moment, voters trust Republican hands slightly more

Historically Influential Demographics

- Suburbanites R+4
- Maricopa County R+3
- Hispanic/Latino D+10
- Independents D+2

Q) When it comes to running the state of Arizona, which political party do you believe would do a better job, in general? (n=1002 registered voters)

Subgroups: Suburbanites (n=500), Maricopa County (n=605), Hispanic/Latino (n=130), Independents (n=269)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
“We choose to go to the Moon in this decade and do the other things, not because they are easy, but because they are hard.”

– John F. Kennedy, 1962

“We choose to nominate unpopular candidates who make it difficult for us to win in a general election in this decade not because it is easy, but because it is hard.”

– Arizona Republican Primary Voters, 2020-present
Kari Lake has a more than 2:1 lead in what will be Arizona’s 5th Senate election in as many cycles.

2024 GOP Senate Primary

Kari Lake: 54%
Mark Lamb: 21%
Brian Wright: 6%
George Nicholson: 2%
Someone else: 1%
Not sure: 17%

Kari Lake - Candidate Image
Net Fav +35
Total Favorable 63%
Total Unfavorable 28%

Mark Lamb - Candidate Image
Net Fav +39
Total Favorable 55%
Total Unfavorable 16%

Q) If the primary election for Senate were today, who would you vote for? (n=384 Republican voters)

Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
When it comes to General Election viability, Lamb is clearly in a better position than Lake

Opinion of Republican US Senate Candidates
(among general electorate)

Mark Lamb
- Very favorable: 18%
- Somewhat favorable: 27%
- Somewhat unfavorable: 14%
- Very unfavorable: 8%
- No opinion: 24%
- Never heard of: 8%

Kari Lake
- Very favorable: 21%
- Somewhat favorable: 20%
- Somewhat unfavorable: 12%
- Very unfavorable: 37%
- No opinion: 7%

Here are the names of some people and organizations in the news. Using the grid below, please indicate your impression of each. If you have no opinion or have never heard of the person, you can indicate that too. Q) Mark Lamb, Pinal County Sheriff, Q) Kari Lake, former Arizona Gubernatorial Candidate (n=384 Republican voters)

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

She’s finally decided. What next?
Sinema’s voters – older Independents who don’t like Biden OR Trump – are up for grabs

Don’t Like Biden

<table>
<thead>
<tr>
<th>Net Favorable</th>
<th>23%</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Among all voters</td>
<td>-9%</td>
</tr>
</tbody>
</table>

Don’t Like Trump

<table>
<thead>
<tr>
<th>Net Favorable</th>
<th>30%</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Among all voters</td>
<td>-6%</td>
</tr>
</tbody>
</table>

Don’t Like Lake

<table>
<thead>
<tr>
<th>Net Favorable</th>
<th>45%</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Among all voters</td>
<td>-9%</td>
</tr>
</tbody>
</table>

Want Trump barred from office, if convicted

<table>
<thead>
<tr>
<th>Want him Barred</th>
<th>62%</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Among all voters</td>
<td>54%</td>
</tr>
</tbody>
</table>

Registered Independents

<table>
<thead>
<tr>
<th>Party-IND</th>
<th>56%</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Among all voters</td>
<td>35%</td>
</tr>
</tbody>
</table>

55 and older

<table>
<thead>
<tr>
<th>Age-55+</th>
<th>51%</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Among all voters</td>
<td>43%</td>
</tr>
</tbody>
</table>

Q) If the 2024 Senate election were being held today, who would you vote for? (n=218 Kyrsten Sinema voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
But, when Gallego and Lake were the only choices, Sinema voters picked Gallego.
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

Net

Gallego +10

47%

37%

Historically Influential Demographics

- Suburbanites: Gallego +10
- Maricopa County: Gallego +11
- Hispanic/Latinos: Gallego +15
- Independents: Gallego +18

Q) If the primary election for Senate were today, who would you vote for? (n=1002 registered voters)

Subgroups: Suburbanites (n=500), Maricopa County (n=605), Hispanic/Latino (n=130), Independents (n=269)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
It’s not a Republican problem; it’s a Lake problem

- Groups of voters who historically have played an influential role in deciding elections in Arizona are much more likely to prefer that Republicans lead the state.

- However, this does not translate to support for Kari Lake in a head-to-head match-up against Ruben Gallego.

Q) When it comes to running the state of Arizona, which political party do you believe would do a better job, in general?

Q) If the primary election for Senate were today, who would you vote for? (n=1002 registered voters)

Subgroups: Suburbanites (n=500), Maricopa County (n=605), Hispanic/Latino (n=130), Independents (n=269)

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

*We get it, it’s close but boring*
Home House is Where the Heart is: AZ Congressional races are shaping up to be another nail-biter

2024 Congressional Generic Ballot

- The Republican candidate: 42%
- The Democratic candidate: 39%
- Other: 2%
- Not sure: 16%

2022 US House Elections in Arizona

<table>
<thead>
<tr>
<th></th>
<th>Total Votes*</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Republican Candidates</td>
<td>1,127,407</td>
<td>52%</td>
</tr>
<tr>
<td>Democratic Candidates</td>
<td>1,016,009</td>
<td>47%</td>
</tr>
</tbody>
</table>

Q) When you cast your vote for a member of Congress, which party will you vote for? (n=1002 registered voters)

Voter Data Source: Arizona Secretary of State, Date Accessed 2/19/24

*Total excludes CD8 where Republican Debbie Lesko ran unopposed
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Despite a 5-point win statewide, Republicans narrowly eked out wins in two competitive districts.

District 1

- 2022 Election Result: R+0.8
- Results:
  - Schweikert: 50-60%, 60-70%, 70-80%, 80-90%, >90%
  - Hodge: 50-60%, 60-70%, 70-80%

Statewide Republican House Result
- R+5

District 6

- 2022 Election Result: R+1.4
- Results:
  - County results:
    - Ciscomani: 50-60%, 60-70%, 70-80%
    - Engel: 50-60%

*Total excludes CD8 where Republican Debbie Lesko ran unopposed.

Voter Data Source: Arizona Secretary of State, Date Accessed 2/19/24
Image Source: Wikipedia.org, Date Accessed 2/19/24
Both districts in Republican hands are predicted to be competitive again, according to election forecasters.

<table>
<thead>
<tr>
<th>Republicans</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOSS-UP (9)</strong></td>
</tr>
<tr>
<td>Juan Ciscomani (AZ-6)</td>
</tr>
<tr>
<td>David Schweikert (AZ-1)</td>
</tr>
<tr>
<td>John Duarte (CA-13)</td>
</tr>
<tr>
<td>Mike Garcia (CA-27)</td>
</tr>
<tr>
<td>David Valadao (CA-22)</td>
</tr>
<tr>
<td>Don Bacon (NE-2)</td>
</tr>
<tr>
<td>Mike Lawler (NY-17)</td>
</tr>
<tr>
<td>Marc Molinaro (NY-19)</td>
</tr>
<tr>
<td>L. Chavez-DeRemer (OR-5)</td>
</tr>
<tr>
<td><strong>SAFE REPUBLICAN FLIPS (3)</strong></td>
</tr>
<tr>
<td>NC-14 Open (Jackson)</td>
</tr>
<tr>
<td>NC-6 Open (Manning)</td>
</tr>
<tr>
<td>NC-13 Open (Nickel)</td>
</tr>
</tbody>
</table>

Total seats rated Safe Republican: 190
Total seats rated Safe, Likely, or Leans R: 211

Source: Sabato’s Crystal Ball, Date Accessed: 2/19/2024
Republicans in CD1 and CD6 will likely need crossover Biden voters to win reelection...signs say that might be possible again

### Generic Congressional Ballot by 2024 Presidential Preference

<table>
<thead>
<tr>
<th>Donald Trump</th>
<th>Joe Biden</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>82%</strong></td>
<td><strong>76%</strong></td>
</tr>
<tr>
<td><strong>4%</strong></td>
<td><strong>14%</strong></td>
</tr>
</tbody>
</table>

#### CD1

<table>
<thead>
<tr>
<th>Election Result</th>
<th>2020 Pres.</th>
<th>D+2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022 House</td>
<td>R+0.8</td>
<td></td>
</tr>
</tbody>
</table>

#### CD6

<table>
<thead>
<tr>
<th>Election Result</th>
<th>2020 Pres.</th>
<th>D+0.4</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022 House</td>
<td>R+1.4</td>
<td></td>
</tr>
</tbody>
</table>

Q) When you cast your vote for a member of Congress, which party will you vote for? (n=1002 registered voters)

Q) If the 2024 presidential election were being held today, who would you vote for? (n=1002 registered voters)

Historical election data source: Wikipedia.org

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

Who’s winning?
Biden’s lead is gone, Trump currently in a strong position in battleground AZ

Biden versus Trump

<table>
<thead>
<tr>
<th></th>
<th>Biden</th>
<th>Trump</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona 2020 Official Results</td>
<td>49.4%</td>
<td>49.1%</td>
</tr>
<tr>
<td>Current RCP Polling Average</td>
<td>48.4%</td>
<td>43.2%</td>
</tr>
</tbody>
</table>

Source: RealClearPolitics, Date Accessed: 5/13/24
The Israel-Hamas War
Most Arizona voters blame Hamas for the escalating violence in the Middle East.

- Very few people are laying the blame at the feet of either the Palestinian or Israeli people as a whole.

Q) Which side do you find to be primarily responsible for the escalation of violence in the Israel-Hamas war? (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Teens struggle to identify misinformation about Israel-Hamas conflict — the world's second "social media war" – CBS News, 12/19/23

On TikTok, views of pro-Palestine posts far surpass views of pro-Israel posts – Axios, 10/31/23

EU demands Meta and TikTok detail efforts to curb disinformation from Israel-Hamas war – AP News, 10/19/2023

TikTok Pushes Back Against Claims It Fuels Antisemitism – New York Times, 11/2/2023
Daily TikTok users are much less likely than those who do not use TikTok to blame Hamas for the current violence.

### Responsible Party for Violence in the Israel-Hamas War by TikTok Usage

<table>
<thead>
<tr>
<th>Responsible Party</th>
<th>All Voters</th>
<th>Daily TikTok Users</th>
<th>Non TikTok Users</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The Israeli people</strong></td>
<td>18%</td>
<td>12%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>The Palestinian people</strong></td>
<td>1%</td>
<td>34%</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Hamas, a Palestinian militia group</strong></td>
<td>29%</td>
<td>60%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>The Israeli government</strong></td>
<td>12%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>No opinion</strong></td>
<td>23%</td>
<td>18%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Q) Which side do you find to be primarily responsible for the escalation of violence in the Israel/Hamas war? (n=1002 registered voters)

Subgroups: Daily TikTok users (n=200), Non-TikTok Users (n=567)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
The 25% of registered voters who use TikTok daily tend to be:

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young</td>
<td>51%</td>
<td>Among all voters 27%</td>
</tr>
<tr>
<td>Young</td>
<td>18-34</td>
<td></td>
</tr>
<tr>
<td>Less Formal Education</td>
<td>44%</td>
<td>Among all voters 30%</td>
</tr>
<tr>
<td>Non-White</td>
<td>67%</td>
<td>Among all voters 38%</td>
</tr>
<tr>
<td>People of Color</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maricopa County</td>
<td>68%</td>
<td>Among all voters 60%</td>
</tr>
<tr>
<td>Female</td>
<td>57%</td>
<td>Among all voters 53%</td>
</tr>
</tbody>
</table>

How frequently do you use the following platforms, if at all? Q) TikTok (n=200 daily TikTok users)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
The Abortion Question

Will abortion rights play a major role in 2024? Democrats seem to hope so.
Half of Arizona voters want *some* restrictions on abortion, but do not want to ban it outright

Q) Which of the following best matches your opinion on the topic of abortion? (n=1002 registered voters)

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

- **Pro-lifers**: “60% DO NOT want unrestricted access to abortion!”

- **Pro-choicers**: “90% DO NOT want to ban abortion!”

Both are right, but whichever side wins the argument will be the first to correctly interpret what “*certain circumstances*” means.
Despite being an attention-grabbing topic for the media, only one-quarter of voters say abortion is a top issue facing Arizona – only 1 in 10 say it is the top issue.

Q) Here is a list of some issues facing Arizona. Please select the top three issues you would say are the most important and rank them on a scale of 1-3. (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
The voters who say abortion is *the* top issue facing Arizona are much more likely to support unfettered access to abortion.

**Top Issues Facing Arizona**
- Inflation: 24%
- Immigration: 25%
- Health Care: 30%
- Abortion: 25%

**Personal Abortion Stance**
- Abortion should be legal under any circumstances: 51%
- Abortion should be legal only under certain circumstances: 22%
- Abortion should be illegal in all circumstances: 27%

Q) Which of the following best matches your opinion on the topic of abortion? (n=1002 registered voters)
Here is a list of some issues facing Arizona. Please select the top three issues you would say are the most important and rank them on a scale of 1-3. Q) Abortion

Subgroup: Abortion is the most important issue facing Arizona (n=105)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Political observers think abortion will play a big role in 2024. Do voters agree?
Most voters say abortion will impact their vote to some degree

Groups driving ‘Very impactful’
- Women (40%)
- Ages 18-34 (50%)
- Liberal Democrats (56%)

Impact of a Candidate's Abortion Stance on Choice of Vote

Q) How much of an impact does a candidate's stance on abortion have on whether you vote for them or not? (n=1002 registered voters)
Subgroups: Women (n=555), 18-34 year olds (n=204), Liberal Democrats (n=168)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Impact of a Candidate's Abortion Stance on Choice of Vote by Personal Abortion Stance

- Very impactful
- Somewhat impactful
- Moderately impactful
- Lightly impactful
- Least impactful

All voters
- 36% Very impactful
- 25% Somewhat impactful
- 20% Moderately impactful
- 10% Lightly impactful
- 8% Least impactful

Abortion should be legal under any circumstances
- 49% Very impactful
- 27% Somewhat impactful
- 15% Moderately impactful
- 5% Lightly impactful

Abortion should be legal only under certain circumstances
- 21% Very impactful
- 24% Somewhat impactful
- 28% Moderately impactful
- 16% Lightly impactful
- 11% Least impactful

Abortion should be illegal in all circumstances
- 61% Very impactful
- 22% Somewhat impactful
- 7% Moderately impactful
- 7% Least impactful

Q) How much of an impact does a candidate's stance on abortion have on whether you vote for them or not? (n=1002 registered voters)

Subgroups: Abortion should be legal under any circumstances (n=423), Abortion should be legal only under certain circumstances (n=496), Abortion should be illegal in all circumstances (n=83)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Abortion is going to play at least some role in 2024.

Who is it going to help?
Most voters expect Trump to ban abortion entirely and Biden to increase access

Q) Suppose Donald Trump wins the 2024 election. What do you think he would do about abortion? (n=1002 registered voters)
Q) Suppose Joe Biden wins the 2024 election. What do you think he would do about abortion? (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
While abortion is typically a powerhouse issue for Democrats, both parties stand to reap potential advantages at the ballot box.

Expectations for the Winner of the 2024 Election

<table>
<thead>
<tr>
<th></th>
<th>Trump</th>
<th>Biden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attempt to ban abortion altogether</td>
<td>40%</td>
<td>14%</td>
</tr>
<tr>
<td>Only attempt to restrict abortion to an early point, such as 6 or 15 weeks</td>
<td>22%</td>
<td>13%</td>
</tr>
<tr>
<td>Leave current abortion laws alone</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Attempt to increase abortion access</td>
<td>6%</td>
<td>45%</td>
</tr>
<tr>
<td>Not sure</td>
<td>17%</td>
<td>14%</td>
</tr>
</tbody>
</table>

**Republicans’ advantage:**
- Democratic messaging associating Trump with Dobbs and the farthest right positions on abortion haven’t yet landed. 39% either don’t know Trump’s position OR think he’s basically pro-choice (leave laws alone or increase access).
- A significant chunk don’t really understand Biden’s position (27% think he’d ban or restrict access).

**Democrats’ advantage:**
- The public supports abortion rights, and 40% of voters think Trump would attempt to ban all abortions – clearly putting him on the wrong side of that issue, in the mind of the public.
- Most voters think that Biden would attempt to leave the current laws alone or increase access – a position that, in general, has benefited Democrats and lines up better with public opinion than Trump’s view.

Q) Suppose Donald Trump wins the 2024 election. What do you think he would do about abortion? (n=1002 registered voters)
Q) Suppose Joe Biden wins the 2024 election. What do you think he would do about abortion? (n=1002 registered voters)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
Thank You
This poll was conducted by Noble Predictive Insights from Feb 6-13, 2024 and surveyed Arizona registered voters via opt-in online panel. The sample included 1,002 registered voters and 912 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 +/- 3.2% for likely voters and +/- 3.1% for registered voters.

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

<table>
<thead>
<tr>
<th>Education</th>
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<tbody>
<tr>
<td>High School or Less</td>
<td>30%</td>
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<tr>
<td>Some College</td>
<td>38%</td>
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<tr>
<td>College Graduate</td>
<td>20%</td>
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<tr>
<td>Post-Graduate</td>
<td>12%</td>
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<table>
<thead>
<tr>
<th>Region</th>
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<tbody>
<tr>
<td>Maricopa</td>
<td>60%</td>
</tr>
<tr>
<td>Pima</td>
<td>17%</td>
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<tr>
<td>Rural</td>
<td>24%</td>
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</table>

<table>
<thead>
<tr>
<th>Ethnicity Combined</th>
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<tbody>
<tr>
<td>White, non-Hispanic</td>
<td>62%</td>
</tr>
<tr>
<td>Hispanic/Latino</td>
<td>23%</td>
</tr>
<tr>
<td>Other</td>
<td>15%</td>
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</table>

<table>
<thead>
<tr>
<th>Party Affiliation</th>
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<tbody>
<tr>
<td>Democrat</td>
<td>30%</td>
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<tr>
<td>Independent</td>
<td>35%</td>
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<tr>
<td>Republican</td>
<td>35%</td>
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<table>
<thead>
<tr>
<th>Gender</th>
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<tbody>
<tr>
<td>Male</td>
<td>47%</td>
</tr>
<tr>
<td>Female</td>
<td>53%</td>
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<table>
<thead>
<tr>
<th>Age</th>
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<tbody>
<tr>
<td>18-34</td>
<td>27%</td>
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<tr>
<td>35-44</td>
<td>14%</td>
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<td>45-54</td>
<td>16%</td>
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<tr>
<td>55-64</td>
<td>16%</td>
</tr>
<tr>
<td>65+</td>
<td>27%</td>
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</tbody>
</table>
Want to know more about NPI?
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.

Anyone can hand you data. We hand you answers.
PUBLIC SPEAKING PRESENTATION RETAINERS

At a cadence that makes sense for you, these consistent presentations provide your group with up-to-date research data and analysis to track trends, understand the movement of public sentiment on big topics, and keep a pulse on target groups and issues that matter to you most.

**BEST FOR:**
- Political Climate Updates
- Ballot Tracking
- Trend Analysis
- Consulting

**CHOOSE FROM:**
- Monthly
- Bi-Monthly
- Quarterly
- Bi-Annually

**ONE-OFF PRESENTATIONS**

For when you need an in-depth look at a past event or a particular issue that is unaffected by the future.

**BEST FOR:**
- Post-Election Analysis
- Special Interest
- Annual Company Meetings
## Market Research Services

<table>
<thead>
<tr>
<th>Concept/Message Testing</th>
<th>Pre-Post Advertising Campaign Analysis</th>
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<tbody>
<tr>
<td>Employee Surveys</td>
<td>Focus Groups</td>
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<tr>
<td>Brand Tracking Studies</td>
<td>In-Depth Interviews</td>
</tr>
<tr>
<td>Customer Profiling &amp; Segmentation</td>
<td>Ethnographies</td>
</tr>
<tr>
<td>Brand Equity Solutions</td>
<td>Brand Health Studies</td>
</tr>
</tbody>
</table>

All services can be customized to your business needs and learning objectives.
SOME OF OUR MARKET RESEARCH CLIENTS
Public Opinion Surveys

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

- Greater Phoenix GPL Leadership
- NPRI
- Nevada Policy Research Institute
- AARP Arizona
- Arizona Department of Education
- AIGA Arizona Indian Gaming Association
- Rio Tinto
- Kennecott
- Tucson Metro Chamber
- Citizens Clean Elections Commission
- Greater Phoenix Chamber
- Yankee Institute for Public Policy
- APS
- MESA City Limitless
- One Community Foundation
- Resolution Copper
- iHeart Media
- Arizona Board of Regents
- Avondale
- Arizona Chamber of Commerce & Industry
- Consumer Choice Center
- Noble Predictive Insights
WE ARE A NATIONALLY ACCREDITED RESEARCH FIRM

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

"pre-eminent pollster in the Southwest"

"Phoenix public-opinion expert"

"one of the state's most respected polling organizations"

<table>
<thead>
<tr>
<th>Pollster*</th>
<th># of Polls</th>
<th>Average Error</th>
<th>% of Correct Calls</th>
<th>Average Bias</th>
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<tr>
<td>OH Predictive Insights</td>
<td>5</td>
<td>3.4</td>
<td>89</td>
<td>0±0.3</td>
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<td>0±0.3</td>
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Our Proven Process

1. DISCOVER
   This is the foundation of the project. We spend time understanding your background, objectives, timeline, and budget so we can customize a research plan with the most powerful route to achieve the goals laid out for us.

2. DEVELOP
   During this phase, we build out the research project with your objectives at the center. We finalize the timeline, carefully structure the methodology, and craft purposeful questions that will reap the most meaningful insights for your goals.

3. FIELD
   Once the script is finalized, we field the research. We monitor sample collection daily to ensure accurate fieldwork with a complete and relevant sample of the audience, and update you each step of the way.

4. ANALYZE
   Collection is complete! Now it’s time for our favorite part. Our expert team of data analysts extract and thoroughly analyze all the data to uncover the most meaningful insights that fully address your objectives.

5. REPORT
   With analysis complete, we create reports and deliverables containing actionable insights and intricate breakdowns visualized in a digestible format. We deliver the story within the data and translate it into actionable strategies and tailored solutions to achieve your goals.
Deliverables

TOPLINES

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

- Inflation prices increasing
- Economy-job growth
- National debt/government spending
- Illegal immigration
- Climate change
- High taxes
- Voting rights
- Crime/violence
- Government corruption
- Representation of the Justice Department
- Learning loss/public schools
- Government corruption
- Health care access
- National security
- "Safe" government policies
- Race relations
- Unemployment
- Immigration

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

- Conservative
- Moderate
- Liberal
- Other

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 you

Election Policies' Effect on Perceptions of Fraud

<table>
<thead>
<tr>
<th>Allowing Drop Boxes</th>
<th>Increases Fraud</th>
<th>Unsure</th>
<th>Does Not Increase Fraud</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>32%</td>
<td>18%</td>
<td>50%</td>
</tr>
<tr>
<td>No</td>
<td>46%</td>
<td>17%</td>
<td>37%</td>
</tr>
<tr>
<td>Automatically Mailing Ballots</td>
<td>46%</td>
<td>17%</td>
<td>37%</td>
</tr>
<tr>
<td>Banning Electronic Voting Machines</td>
<td>31%</td>
<td>20%</td>
<td>50%</td>
</tr>
</tbody>
</table>

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 DDG, many respondents had some type of trouble accessing services.
- The support for Medicaid Managed Care increased after hearing messaging facts.

Executive Summary

Key Takeaways: Most respondents feel that they are not interested in seeing ads on television or radio. They also feel that the media has moved to the left and is not a reliable source of information.

| Ads that run during a sporting event or other significant public events | Least appealing
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>75% of participants found 1 less appealing, 70% thought it neutral, and 54% thought it appealing</td>
<td></td>
</tr>
<tr>
<td>80% of 40% vs. 35% of 50-64 yrs</td>
<td></td>
</tr>
<tr>
<td>An ad featuring an average (s) has not considered neutral or negative among professionals</td>
<td></td>
</tr>
</tbody>
</table>

When participants were asked for reasons as to why they become concerned at their location, there was a split evenly as a result of the higher perceived level of risk. However, among those aged 65 and older, only 30% found it appealing.

25% of 25-44 yrs vs. 12% of 45-64 found ads appealing |

17% of entrepreneurs find it appealing vs. 49% of entrepreneurs who find it not appealing on average.

Conclusion: 
- 42% of respondents were affected by [same] employers' approach to consumer relations.
- 41% of non-respondents found it unappealing.
- 49% of 50-64 yrs |
- 50% of 25-44 yrs |

Key Takeaways: Non-respondents are a top target in appeal |
- 52% of those 55% and 52% of past-grade Hs find it appealing |
- 52% of entrepreneurs and 60% of non-entrepreneurs found it appealing.
Strategic Research

Trusted Data

Actionable Insights

Connect with us on social media, visit our website, and feel free to schedule a time with a research expert to discuss more ways in which NPI can be your indispensable strategic research partner.

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(480) 313-1837

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