

NOBLE
PREDICTIVE INSIGHTS

CivEx: 2024 Election Preview & Arizona Political Climate Update

May 2024

Noble Predictive Insights

A Nationally Accredited Research Firm

Our mission is to transform how leaders make decisions by delivering data-based solutions and predictive insights that provide a clear path forward

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

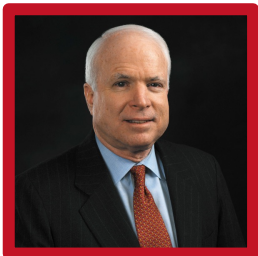
- ❖ A Lot Can Happen In 5 Years
- ❖ AZ = Ground Zero for 2024
- ❖ State of the State
- ❖ 2024 Election
- ❖ The House
- ❖ The Israel-Hamas War
- ❖ The Abortion Question

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



John McCain
US Senator



Jeff Flake
US Senator



Doug Ducey
Governor



Michele Reagan
Secretary of State



Joe Hart
Mine Inspector



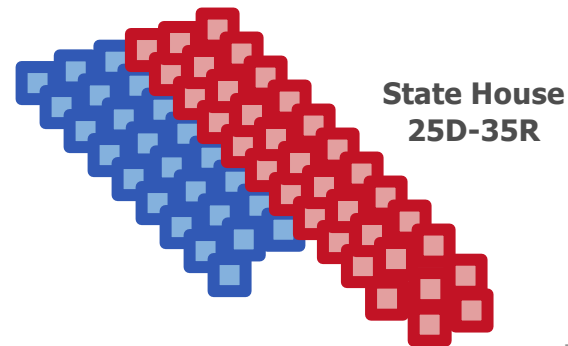
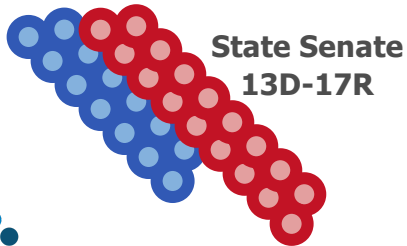
Diane Douglas
Supt. of Pub. Instr.

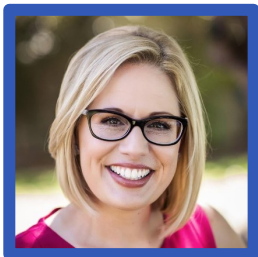


Jeff DeWit
Treasurer



Mark Brnovich
Attorney General





Kyrsten Sinema
US Senator



Mark Kelly
US Senator



Katie Hobbs
Governor



Adrian Fontes
Secretary of State



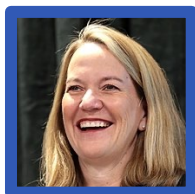
Paul Marsh
Mine Inspector



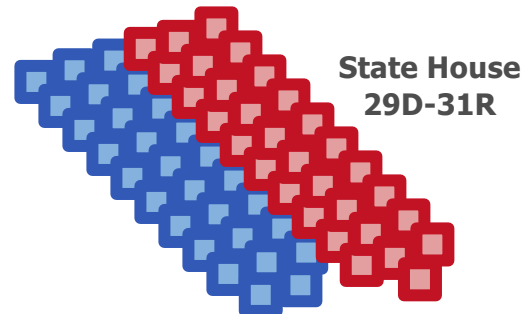
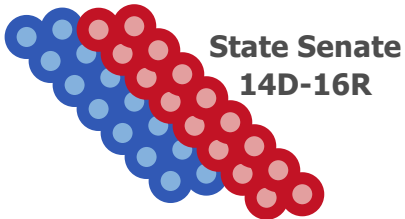
Tom Horne
Supt. of Pub. Instr.



Kimberly Yee
Treasurer



Kris Mayes
Attorney General

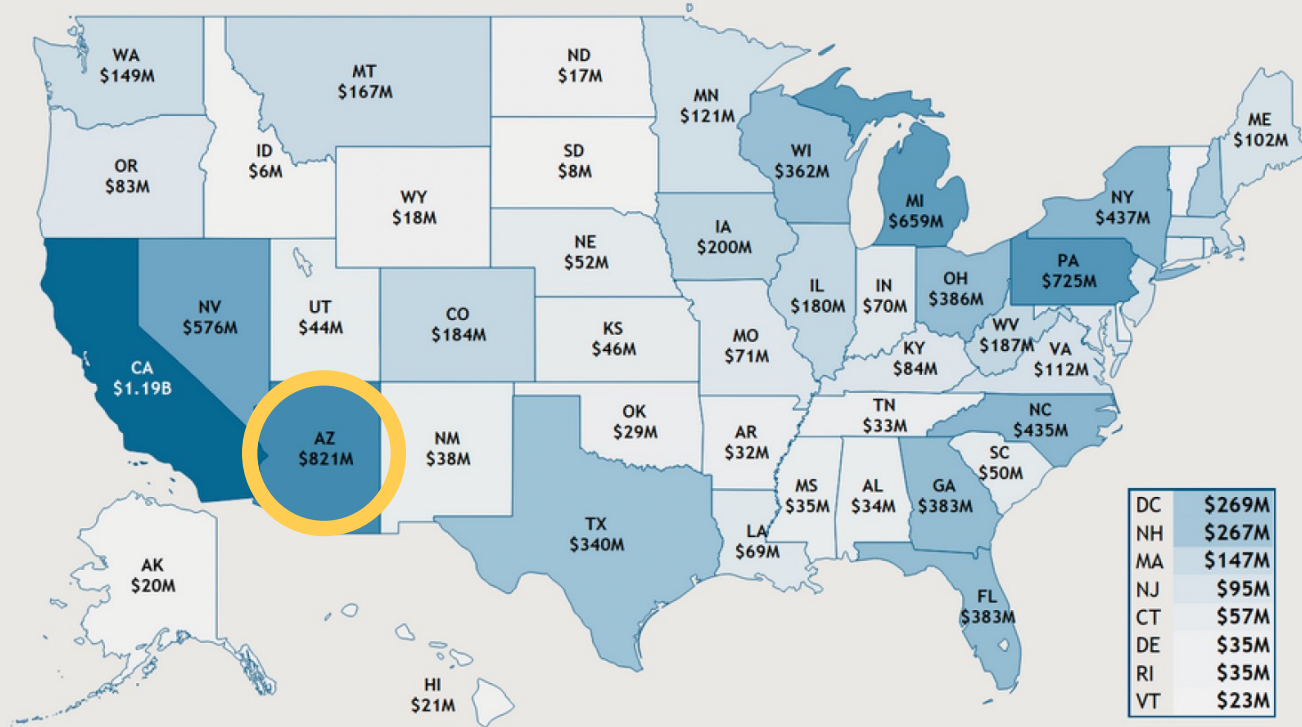


**AZ = Ground Zero for
2024**

Making it Rain Benjamins in the Desert!!!

Spending Across the Map

Figure 4: Projected Spending by State

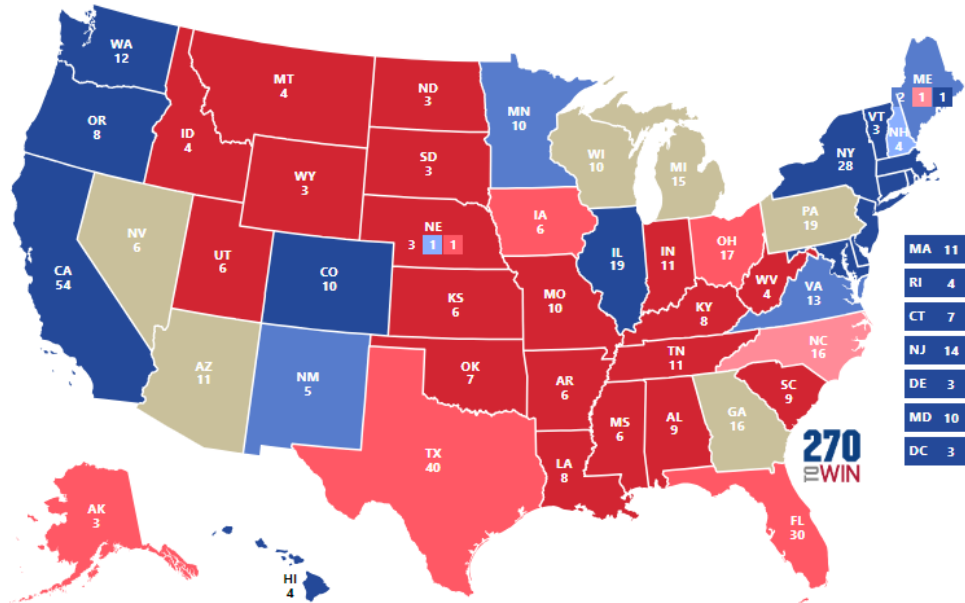
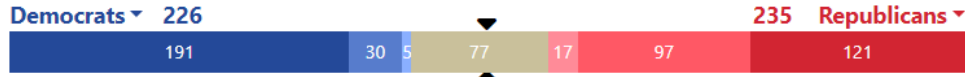


\$821M

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

Source: Ad
Impact 2023-
2024 Projections
Date Accessed:
9/19/23

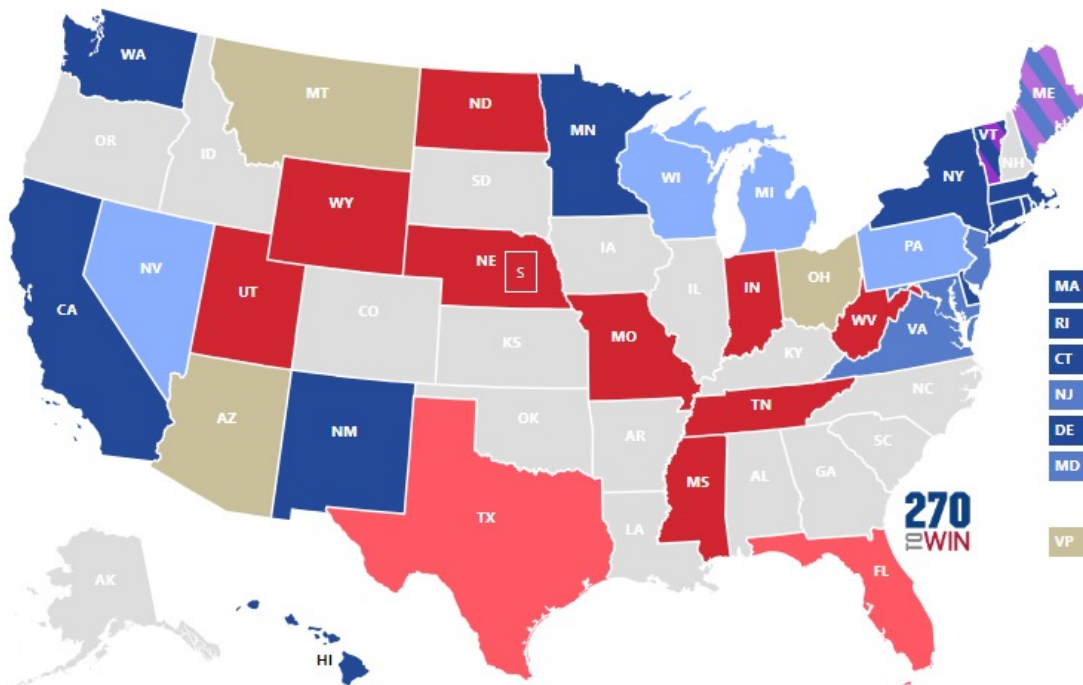
The road to the White House may very well lead through Arizona...



Map Updated: Mar. 6, 2024 at 17:00 UTC (12:00 PM EST)

Forecaster	AZ Rating
Cook Political Report	Toss-Up
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

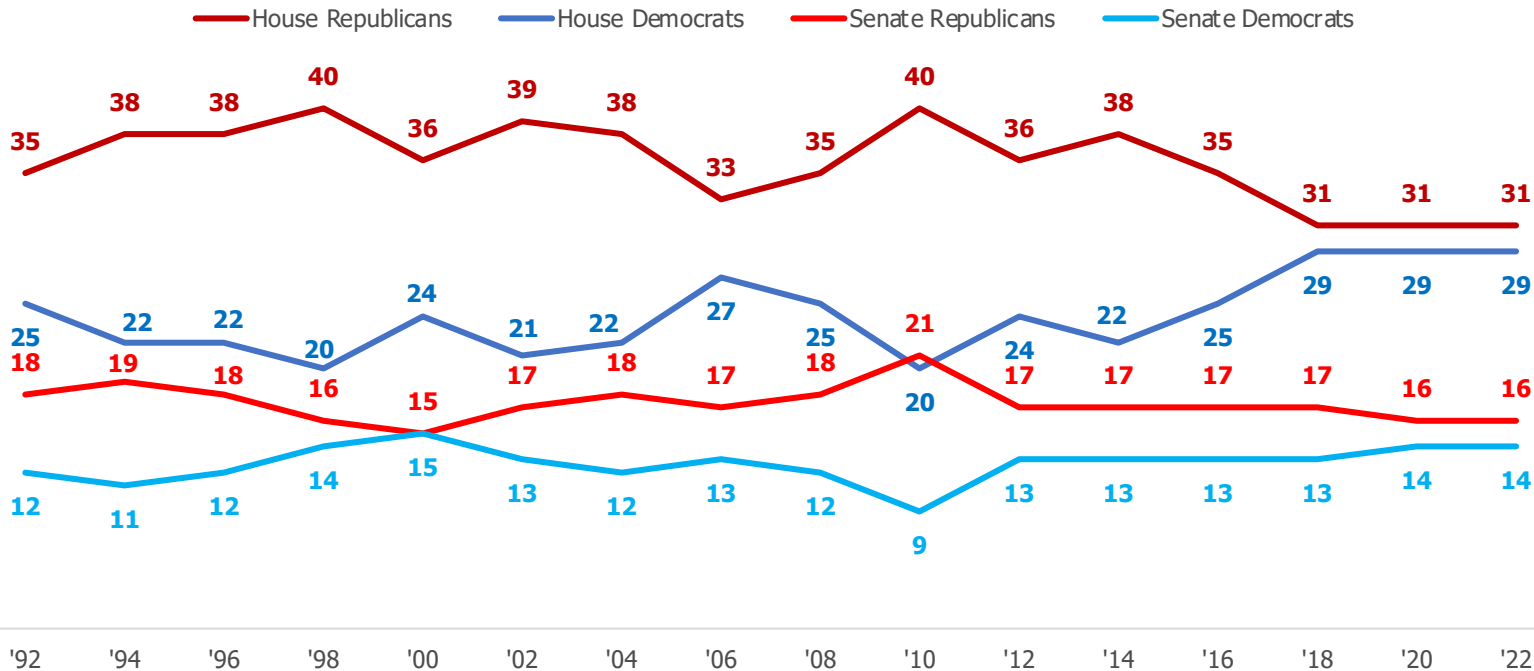


Map Updated: Feb. 9, 2024 at 18:59 UTC (1:59 PM EST)

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

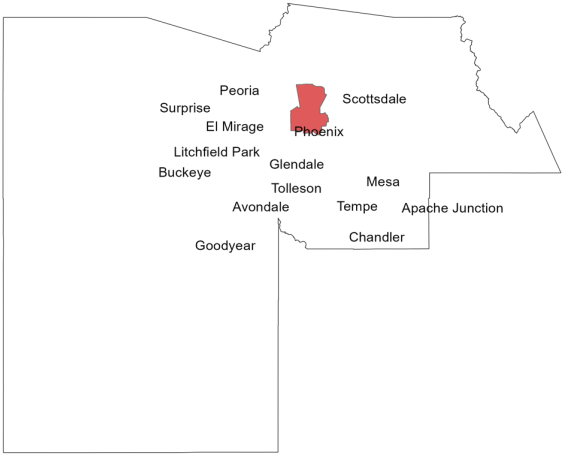
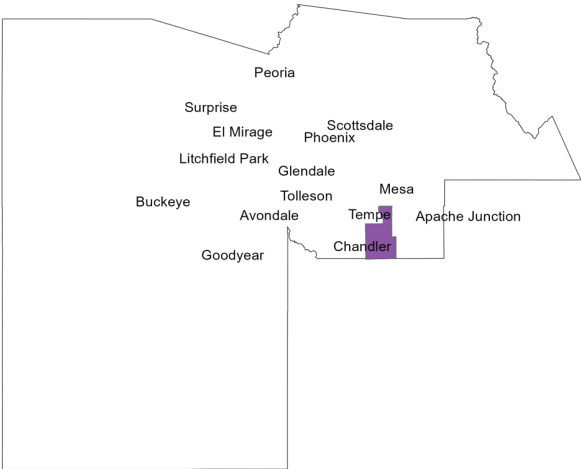
Following the GOP's wide advantage in 2016, control of Arizona's State Legislature has continued to come down to a razor's edge ever since

Control of AZ State Legislature



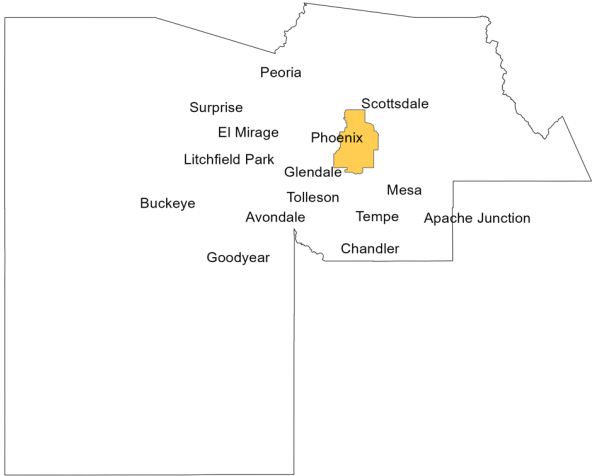
Battlegrounds: three key Phoenix districts

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



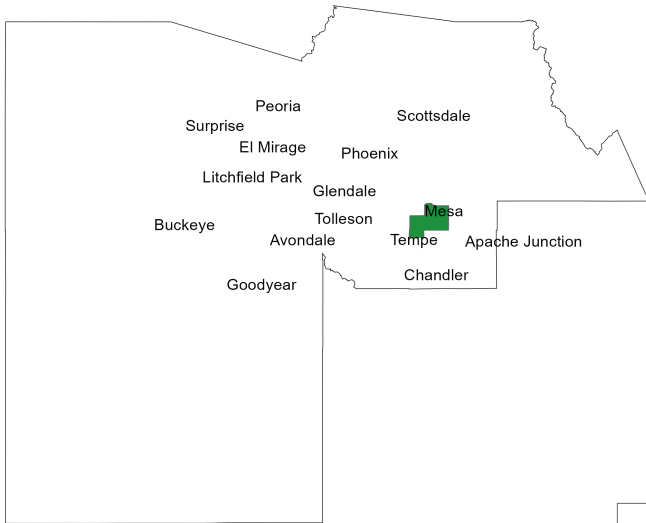
LD-2
House: SPLIT
Senate: R
Trump+2

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



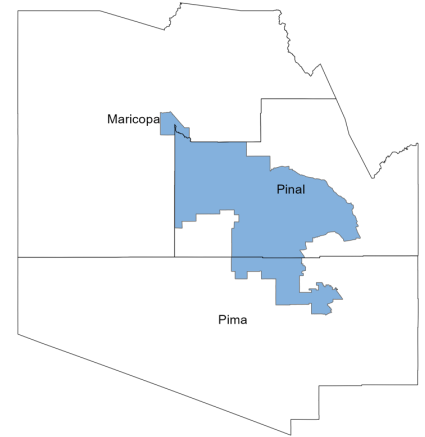
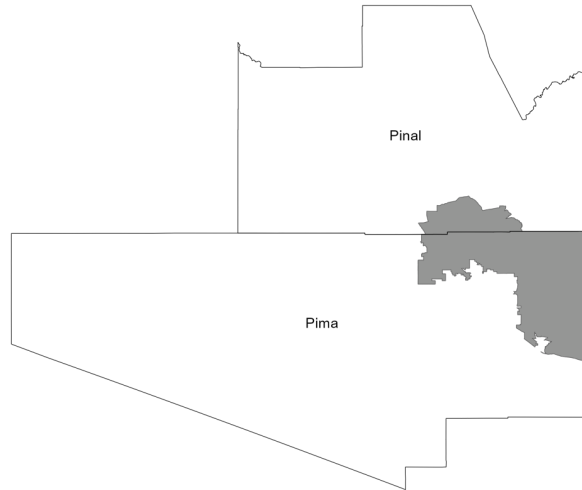
Source: Arizona IRC, AZ State Leg
Data as of 3/22/2024

One more key Maricopa district – and two that stretch to Pima



LD-9
House: 2 D
Senate: D
Biden+6

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



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

The year of the Arizona ballot measure.

6

Confirmed Ballot Measures

38

Potential Ballot Measures

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.

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

Government
Budgets/Spending/Finance

Government
Administration

Constitutional Rights

Abortion

Taxes

Legislation

Labor and Unions

Property

Firearms

Immigration

38

Minimum Wage

Affirmative action

Healthcare

Recreational Drugs

Redistricting

Elections/Electoral
Systems

County and municipal
governance

Government Energy

Direct Democracy

Education

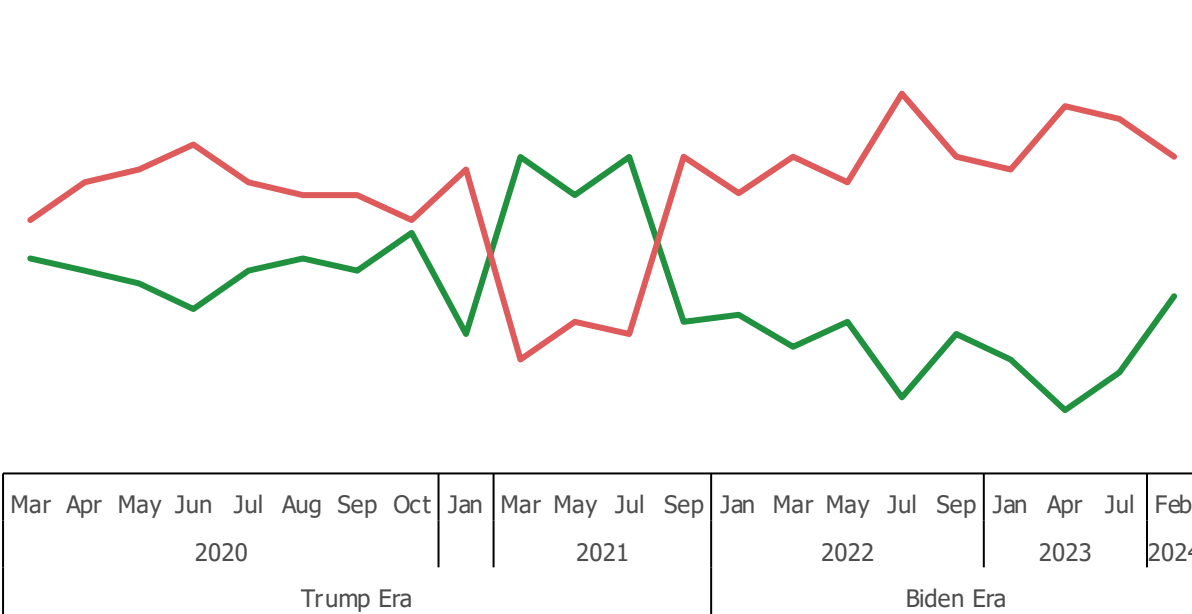
State of the State

Voter opinion regarding the political environment in Arizona

Joe Biden's approval rating reaches the highest point in more than 2 years

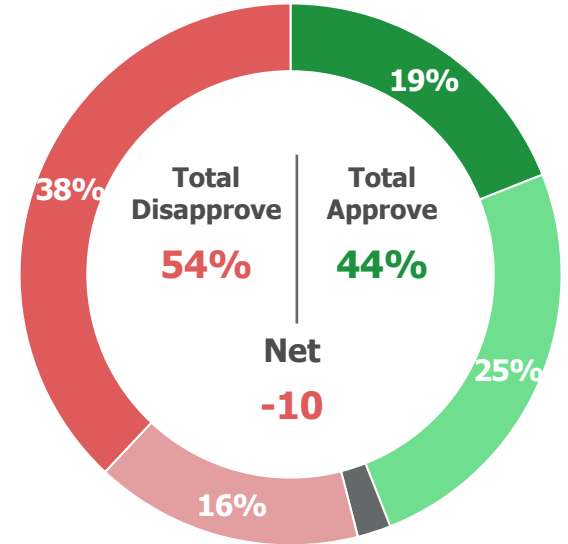
Presidential Approval Rating

— Approval — Disapproval



Presidential Approval

■ Strongly approve ■ Somewhat approve
 ■ Not sure ■ Somewhat disapprove
 ■ Strongly disapprove



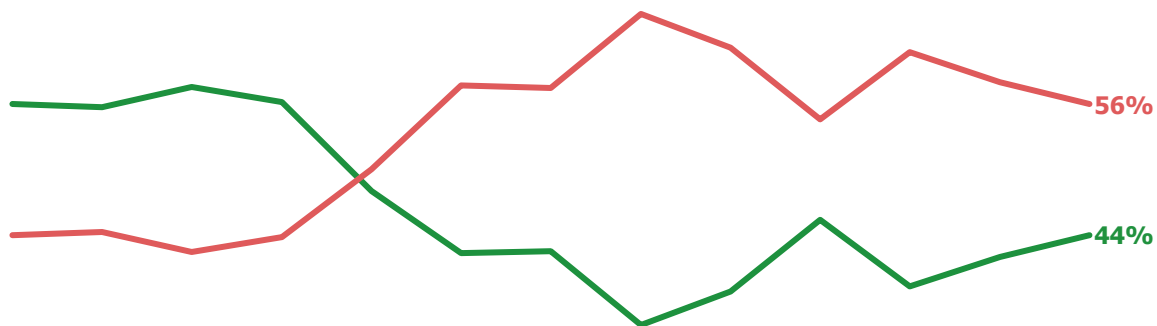
Q) Do you approve or disapprove of the way President _____ is handling his job? (n=1002 registered voters)

† 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

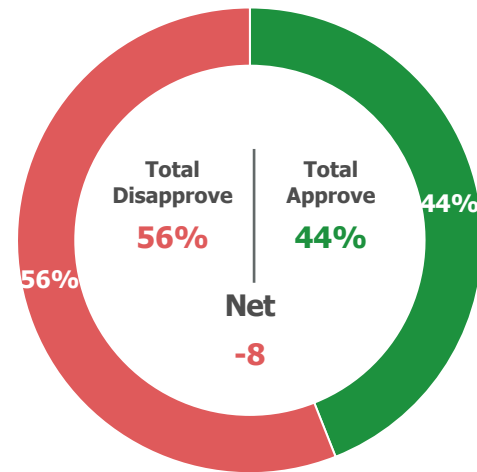
— Arizona is going on the right track — Arizona is going in the wrong direction



Mar	May	Jul	Sep	Jan	Mar	May	Jul	Sep	Jan	Apr	Jul	Feb
2021				2022				2023			2024	

Trajectory of Arizona

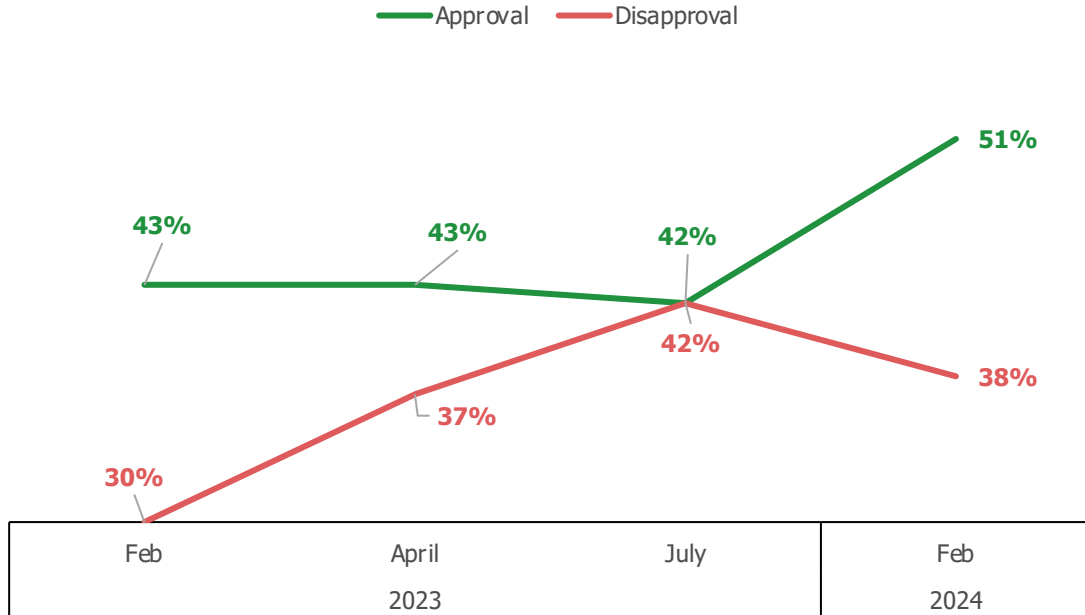
■ Right Track ■ Wrong Direction



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.

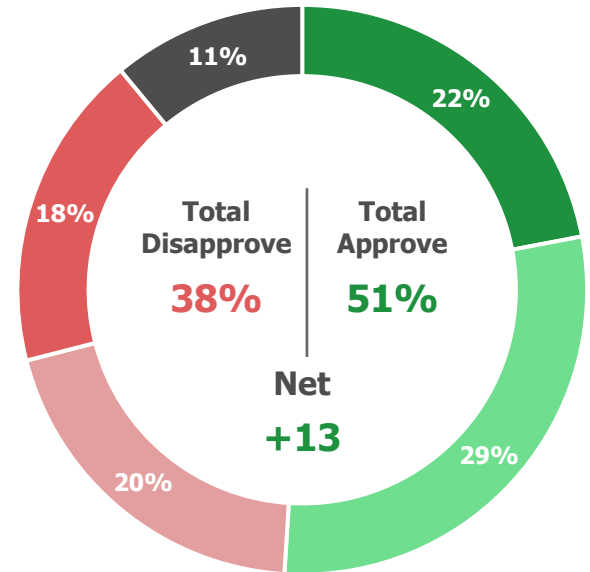
Arizona voters are beginning to come around to Governor Katie Hobbs

Governor Katie Hobbs Approval Rating



Governor Approval Rating

- Strongly approve
- Somewhat approve
- Somewhat disapprove
- Strongly disapprove
- Not sure

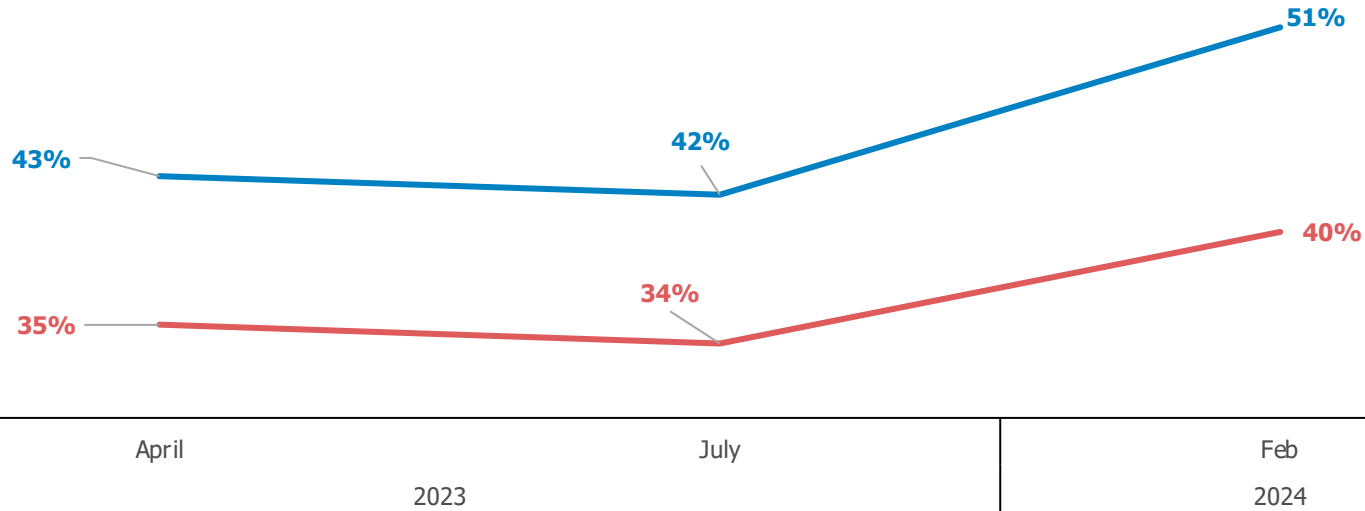


Q) Do you approve or disapprove of the way Governor Katie Hobbs is handling her job? (n=1002 registered voters)
 † Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

Governor Katie Hobbs is in a stronger position with voters than the state legislature

Governor Katie Hobbs and Arizona State Legislature Approval

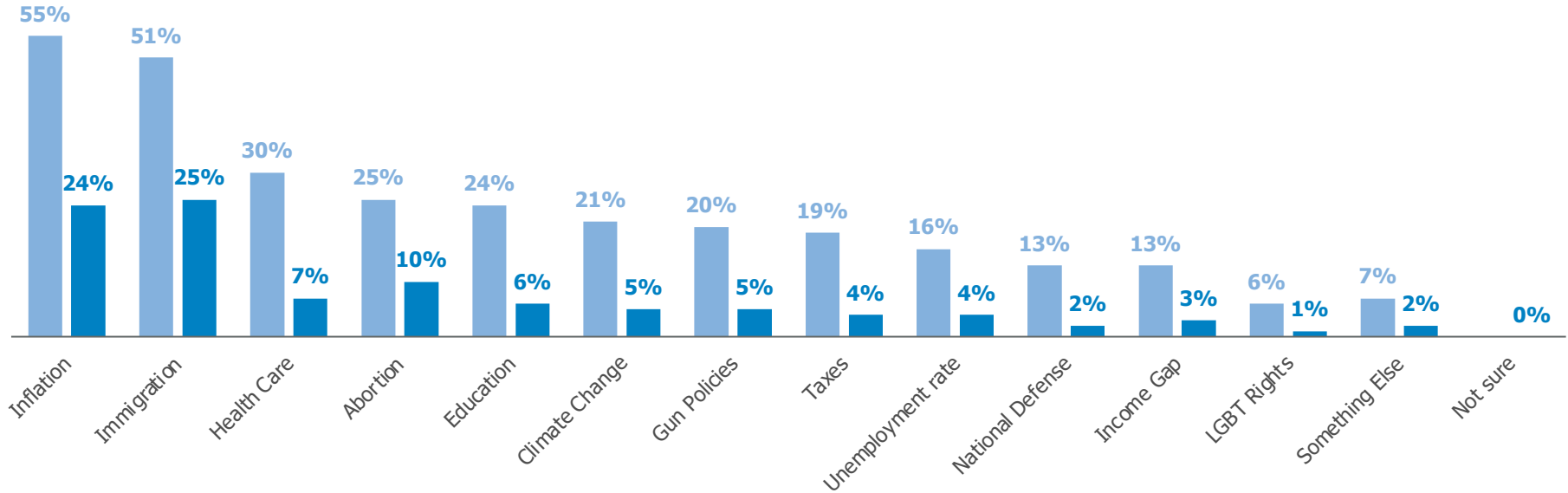
— Hobbs Approval — State Leg Approval



Inflation and Immigration dominate the concerns of most Arizona voters

Top Issues Facing Arizona

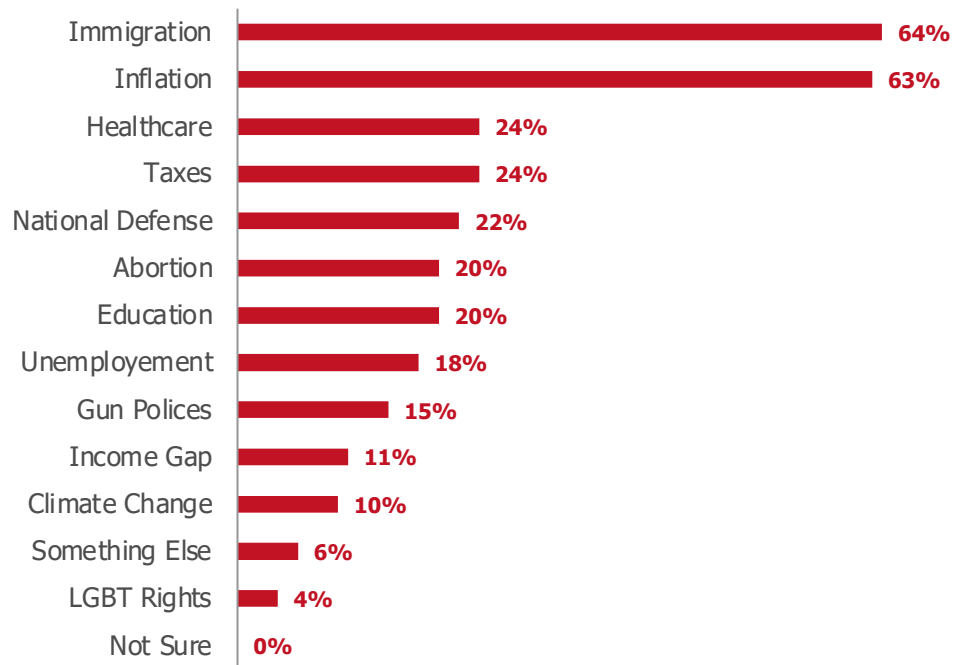
■ Top 3 ■ Top Issue



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

Rural counties	High school level/some college
Immigration (60%)	Inflation (55%/58%)
Inflation (54%)	Immigration (45%/55%)
Healthcare (29%)	Healthcare (28%/30%)

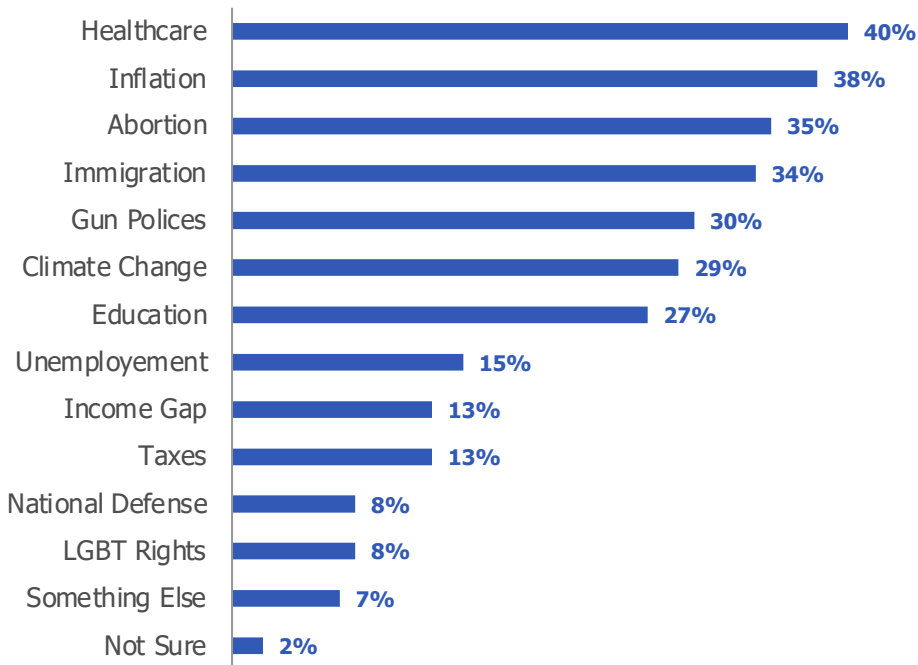
Top 3 Issues among Republicans



Democrats care about healthcare, inflation, and abortion the most – but, unlike the GOP, no runaway top issues. Democratic voters are spread across issues.

Ages 18-34	College/Post-grads
Inflation (49%)	Inflation (57%/46%)
Healthcare (32%)	Immigration (50/50%)
Education (31%)	Healthcare (34%) and Education (35%)

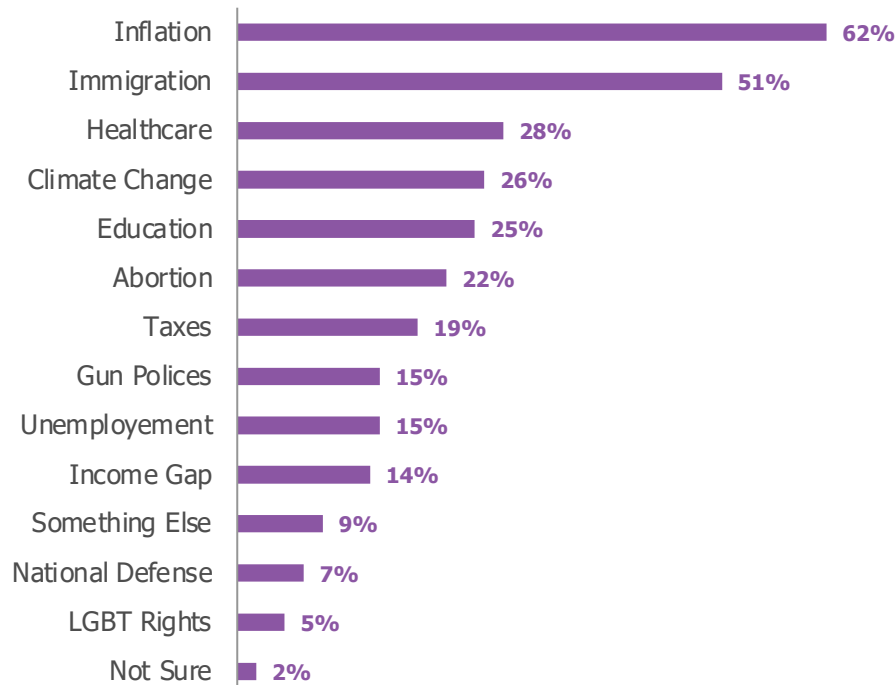
Top 3 Issues among Democrats



Independents are split – worried most about inflation and immigration (two GOP focuses) with some concern for Dem. issues (healthcare, climate, educ., abortion)

Hispanic/Latinos	Moderates
Inflation (53%)	Inflation (53%)
Immigration (37%)	Immigration (48%)
Unemployment (27%)	Healthcare (30%)

Top 3 Issues among Independents



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.

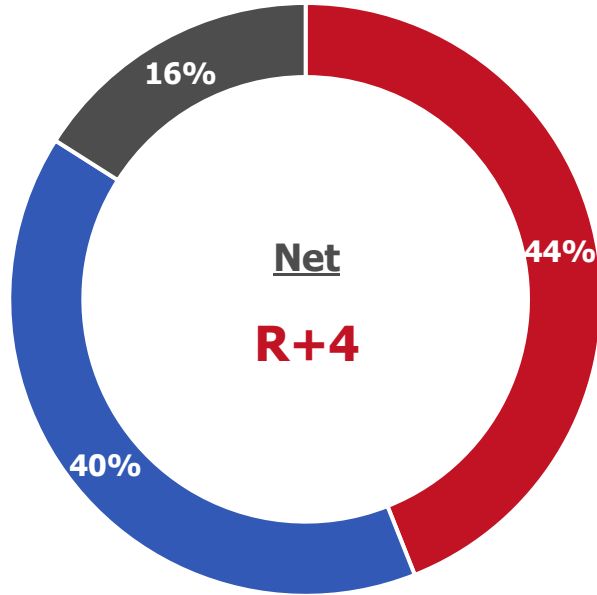
2024 Election

Ground is ripe for Republicans; will they squander it?

At the moment, voters trust Republican hands slightly more

Preferred Party to Lead Arizona

■ Republicans ■ Democrats ■ Neither



Historically Influential Demographics

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

“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**.”

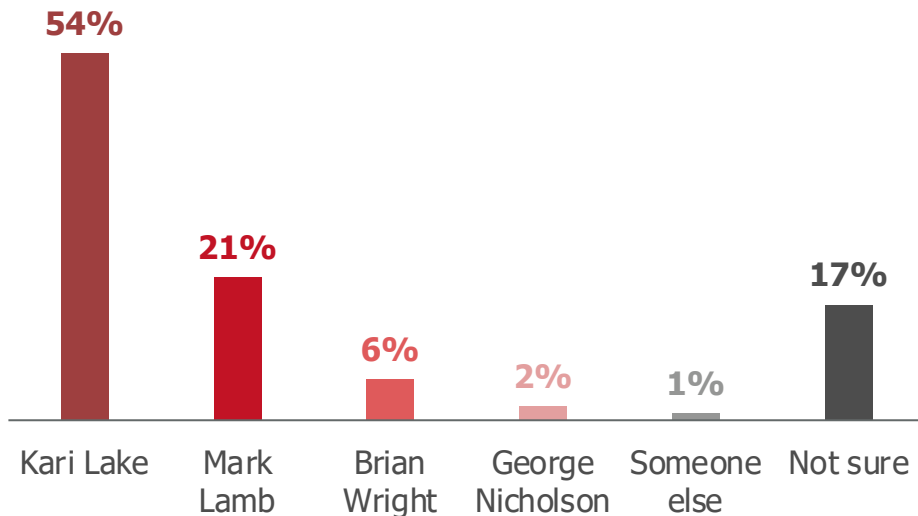
– *John F. Kennedy, 1962*

“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



Candidate Image Only Among Republicans

Net Fav +35

Total Favorable 63%

Total Unfavorable 28%

Mark Lamb



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)

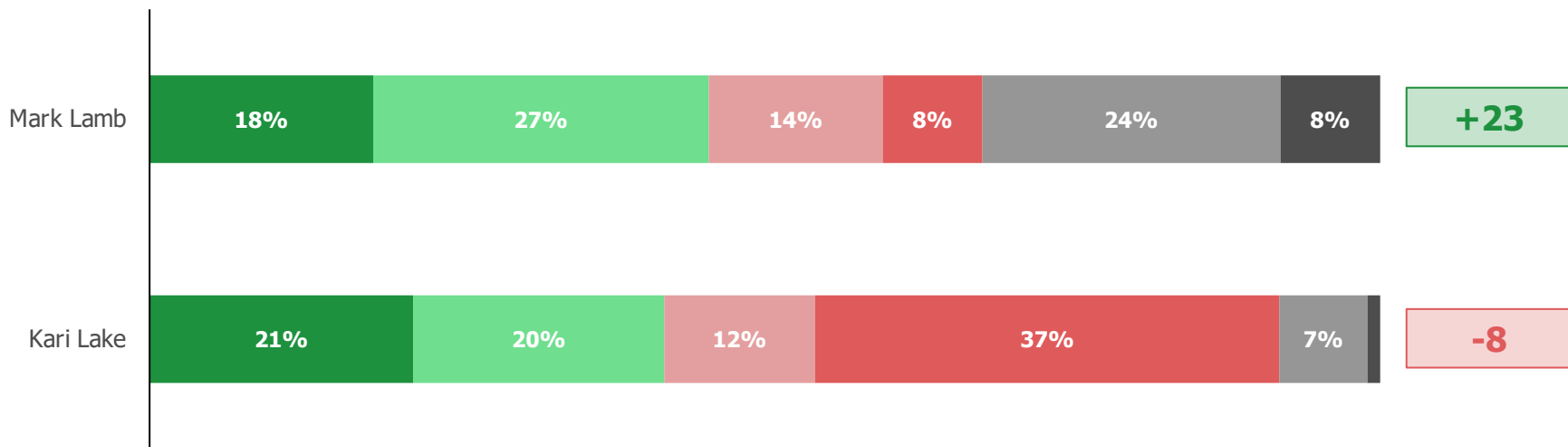
Here are the names of some people and organizations in the news. Using the grid below, please indicate your impression of each. If you have no opinion or have never heard of the person, you can indicate that too. Q) Mark Lamb, Pinal County Sheriff, Q) Kari Lake, former Arizona Gubernatorial Candidate (n=1002 registered 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)*

■ Very favorable ■ Somewhat favorable ■ Somewhat unfavorable ■ Very unfavorable ■ No opinion ■ Never heard of



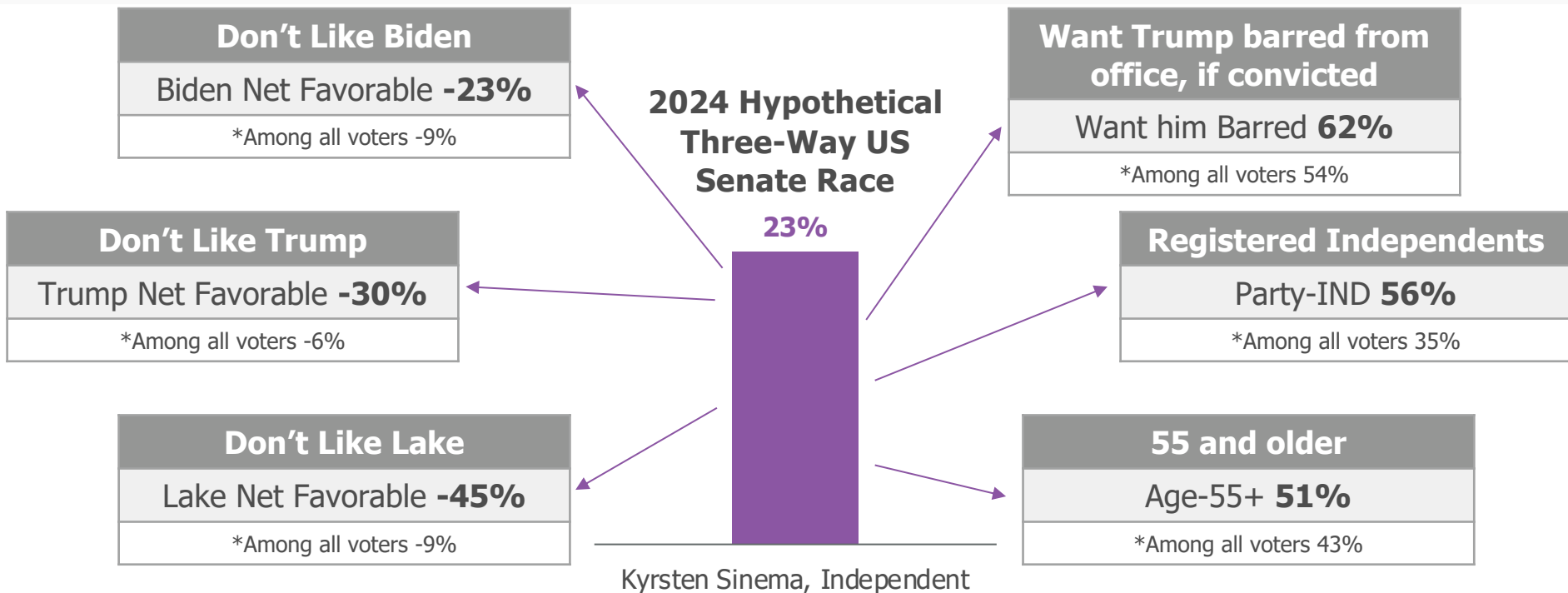
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The Sinema Shakeup

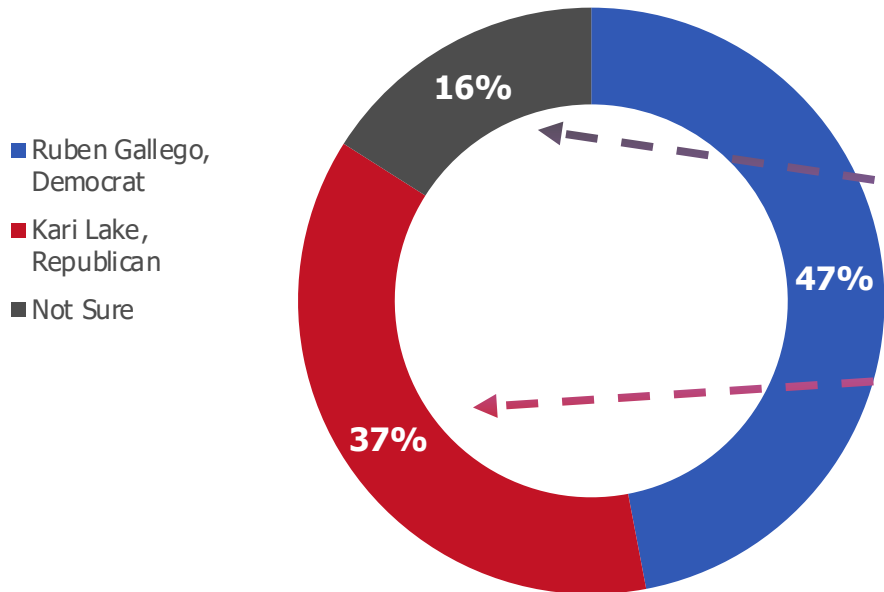
She's finally decided. What next?

Sinema's voters – older Independents who don't like Biden OR Trump – are up for grabs

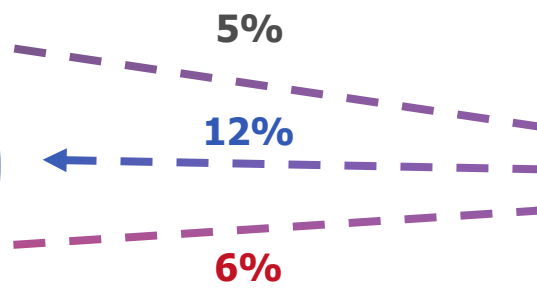
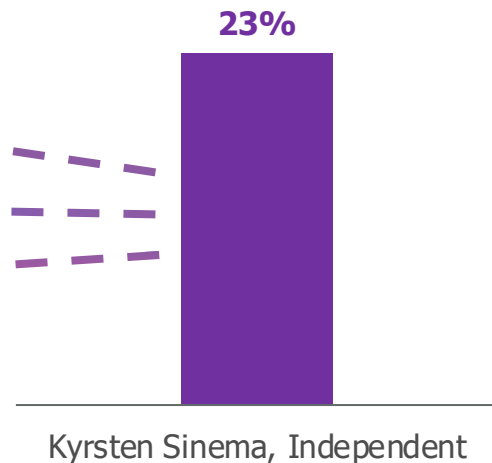


But, when Gallego and Lake were the only choices, Sinema voters picked Gallego

2024 Hypothetical Head-to-Head US Senate Race



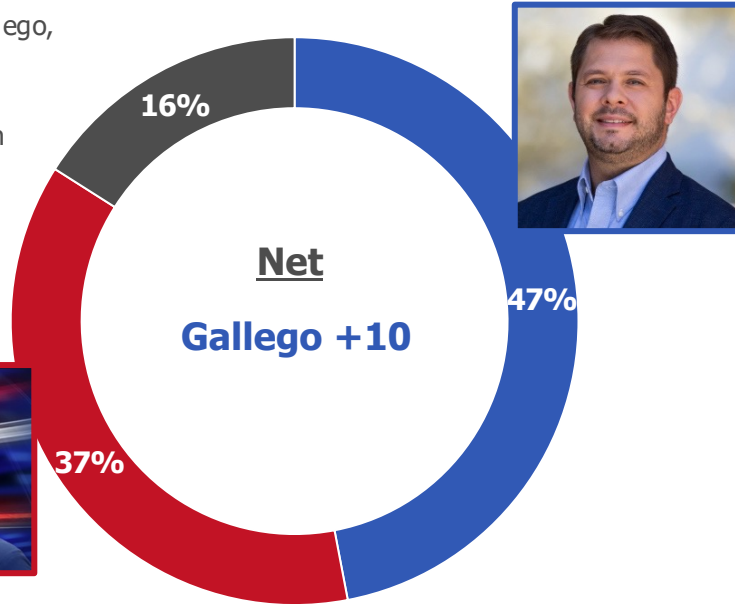
2024 Hypothetical Three-Way US Senate Race



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

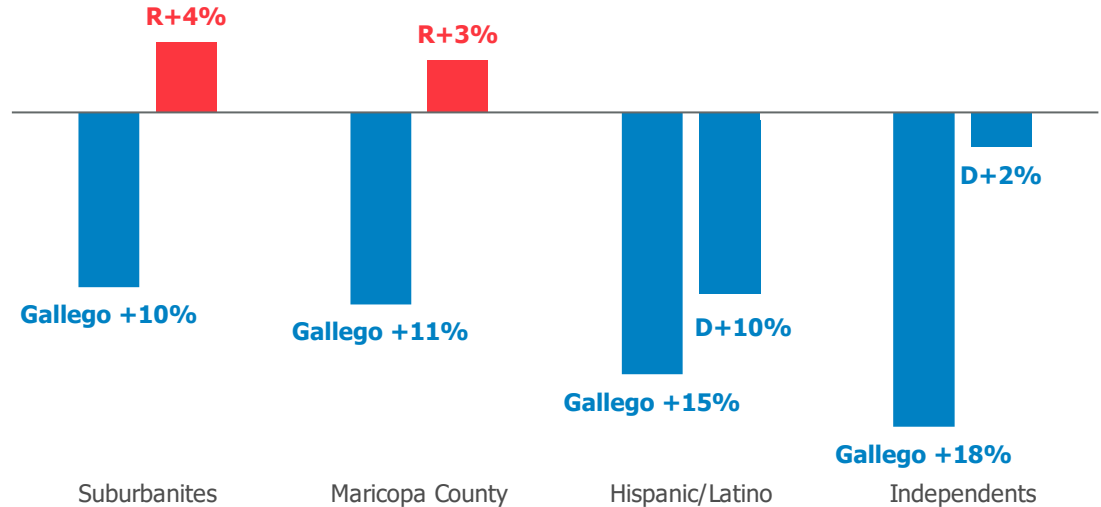
- Suburbanites: **Gallego +10**
- Maricopa County: **Gallego +11**
- Hispanic/Latinos: **Gallego +15**
- Independents: **Gallego +18**



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.

Party Preference of Influential Arizona Demographics



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)

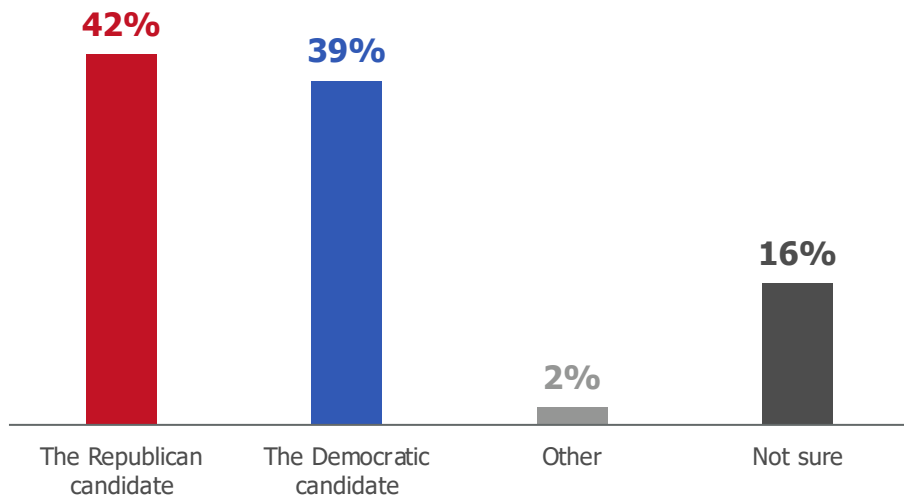
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. 35

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

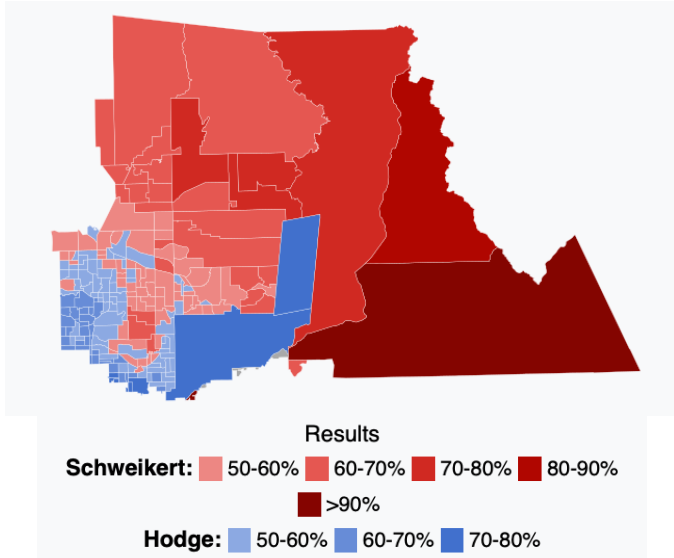


2022 US House Elections in Arizona

	Total Votes*	%
Republican Candidates	1,127,407	52%
Democratic Candidates	1,016,009	47%

Despite a 5-point win statewide, Republicans narrowly eked out wins in two competitive districts

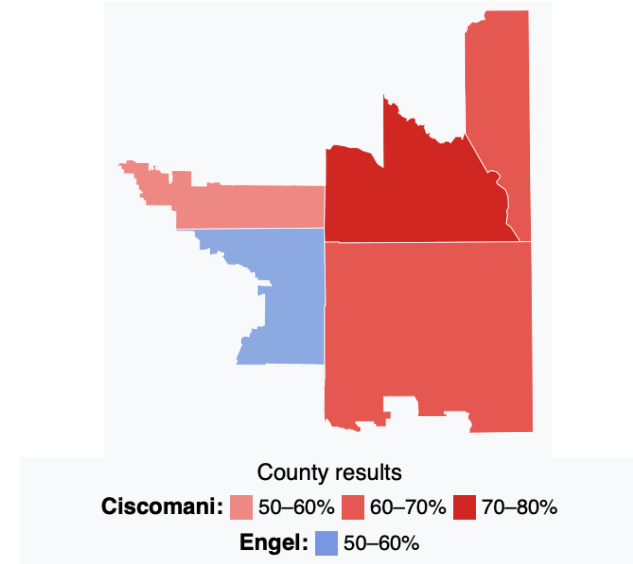
District 1



2022 Election Result
R+0.8

**Statewide
Republican
House Result**
R+5

District 6



2022 Election Result
R+1.4

Both districts in Republican hands are predicted to be competitive again, according to election forecasters

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

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

■ The Republican candidate ■ The Democratic candidate



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

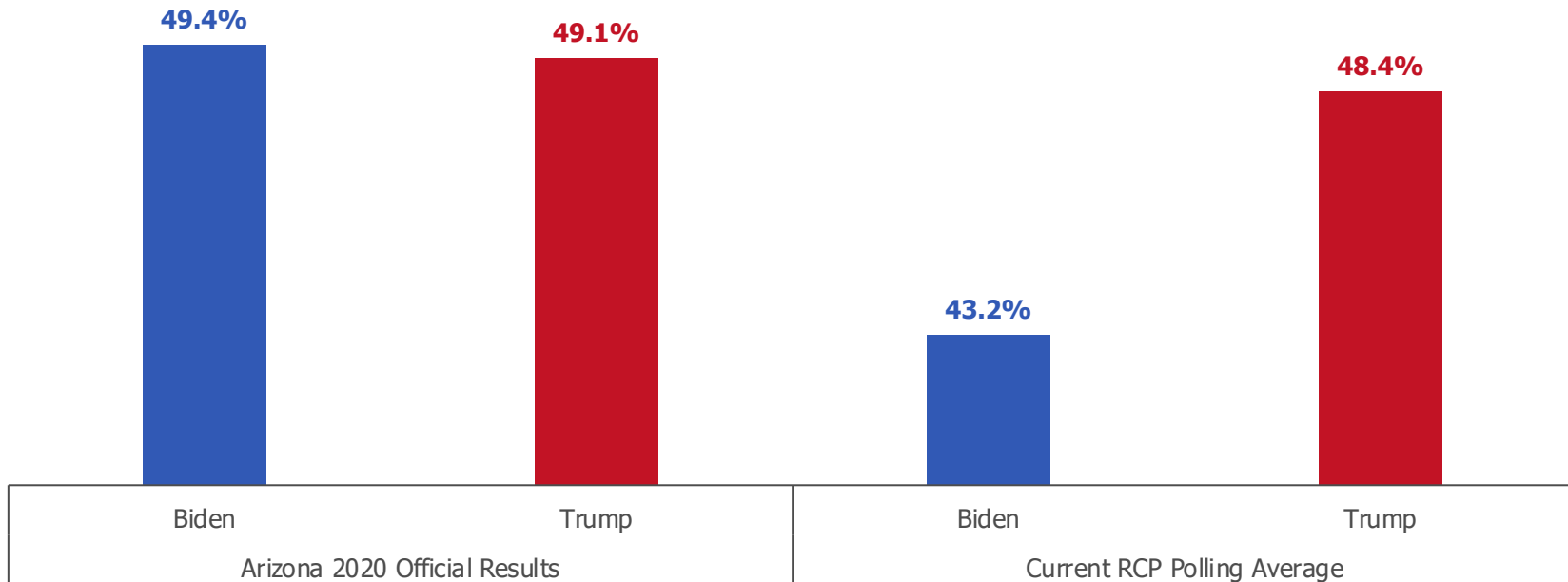
CD6	Election Result
2020 Pres.	D+0.4
2022 House	R+1.4

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

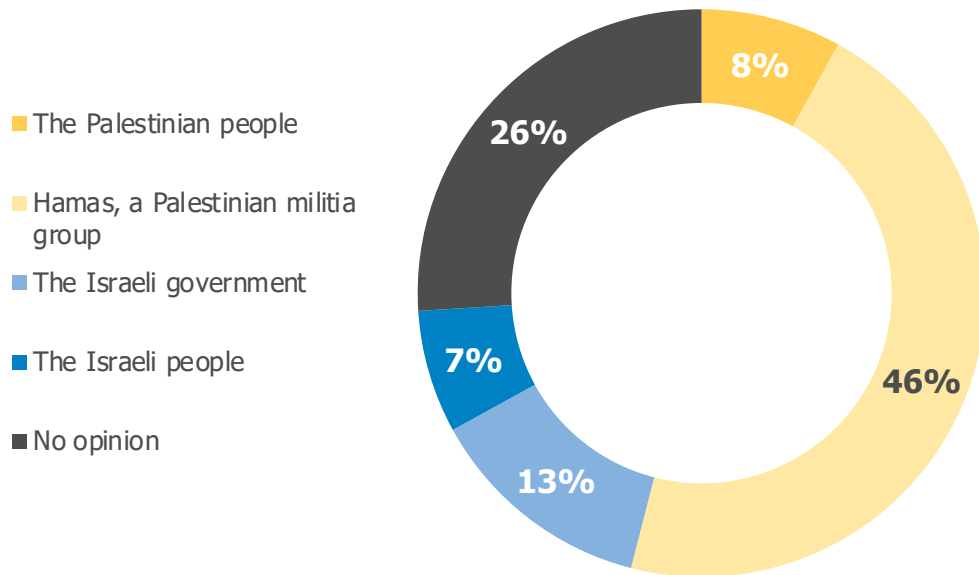


The Israel-Hamas War

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.

Responsible Party for Violence in the Israel-Hamas War



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*

TikTok Pushes Back Against Claims It **Fuels Antisemitism** — *New York Times, 11/2/2023*



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

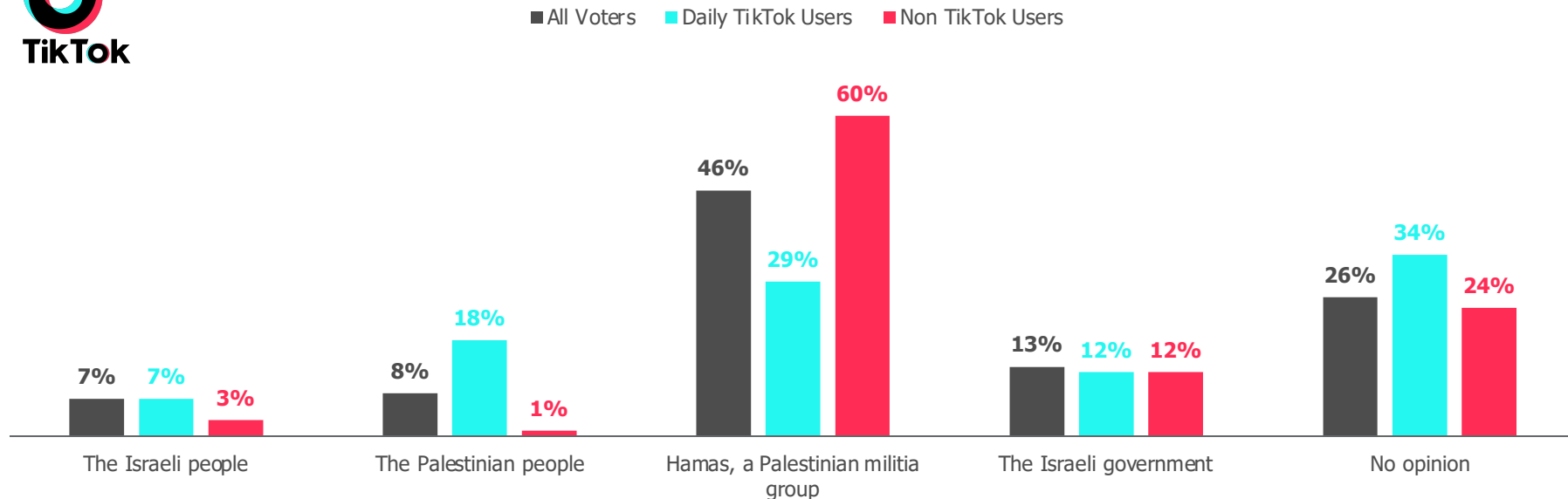
On TikTok, views of pro-Palestine posts **far surpass** views of pro-Israel posts — *Axios, 10/31/23*

TikTok

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



The 25% of registered voters who use TikTok daily tend to be:

Young

18-34 **51%**

*Among all voters 27%

Less Formal Education

HS or Less **44%**

*Among all voters 30%



TikTok

People of Color

Non-White **67%**

*Among all voters 38%

Maricopa County

68%

*Among all voters 60%

Female

57%

*Among all voters 53%



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.

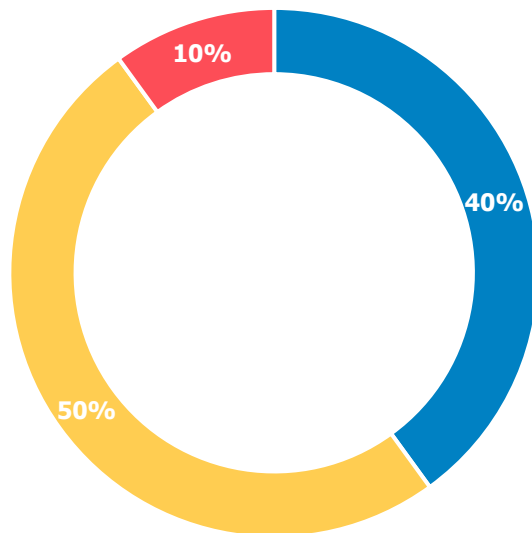
The Abortion Question

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

Personal Abortion Stance

- Abortion should be legal under any circumstances
- Abortion should be legal only under certain circumstances
- Abortion should be illegal in all circumstances



Both the **pro-choice** and **pro-life** sides of the abortion debate love to spin these numbers.

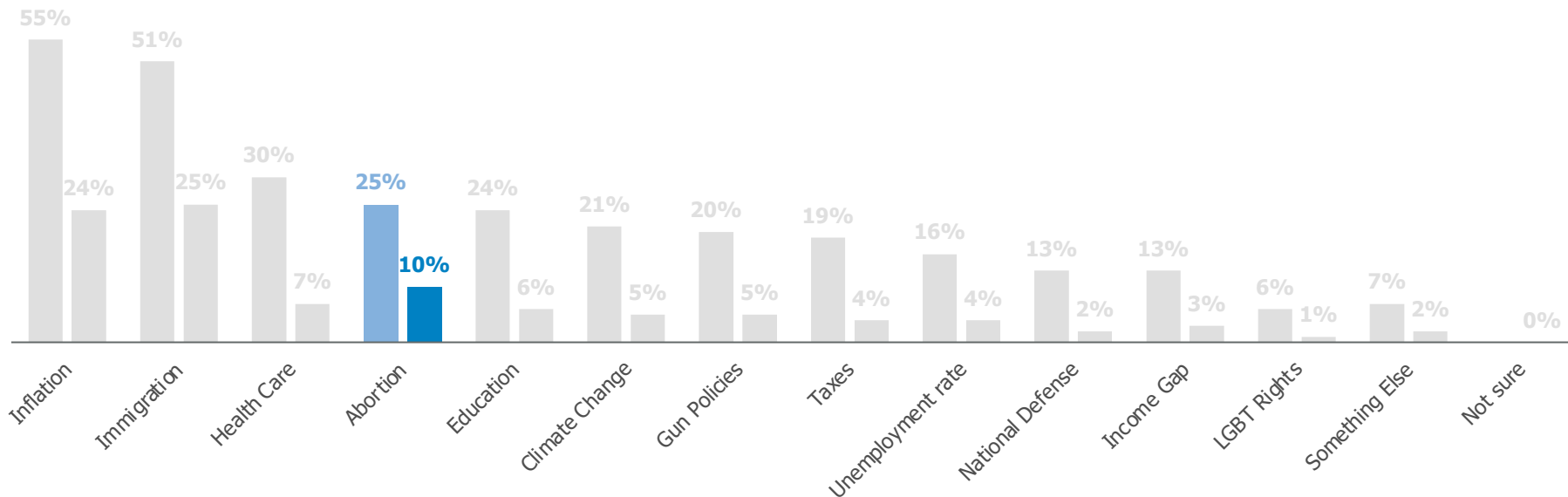
- **Pro-lifers:** “60% DO NOT want unrestricted access to abortion!”
- **Pro-choicers:** “90% DO NOT want to ban abortion!”

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

Top Issues Facing Arizona

■ Top 3 ■ Top Issue

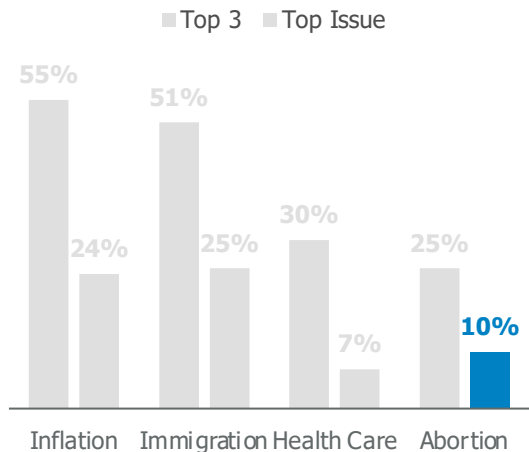


Q) Here is a list of some issues facing Arizona. Please select the top three issues you would say are the most important and rank them on a scale of 1-3. (n=1002 registered voters)

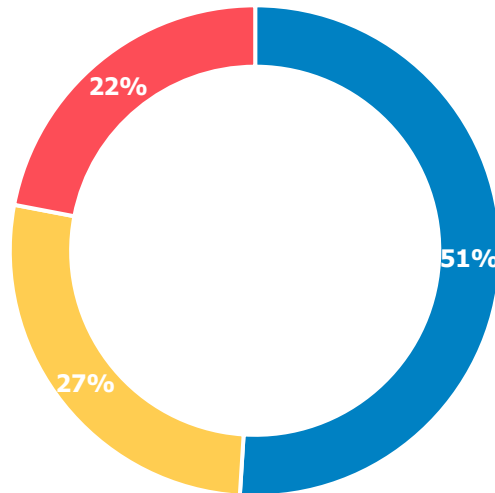
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

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



Personal Abortion Stance



- Abortion should be legal under any circumstances
- Abortion should be legal only under certain circumstances
- Abortion should be illegal in all circumstances

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)

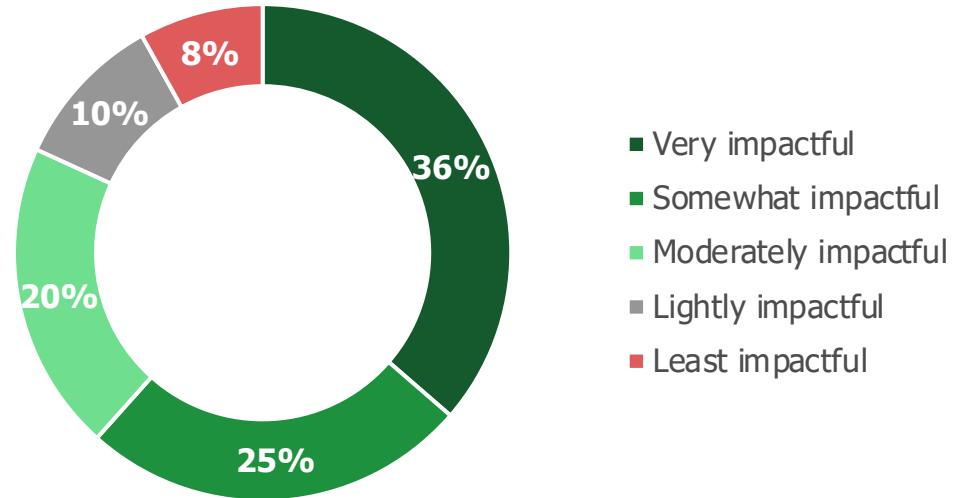
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.

**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)

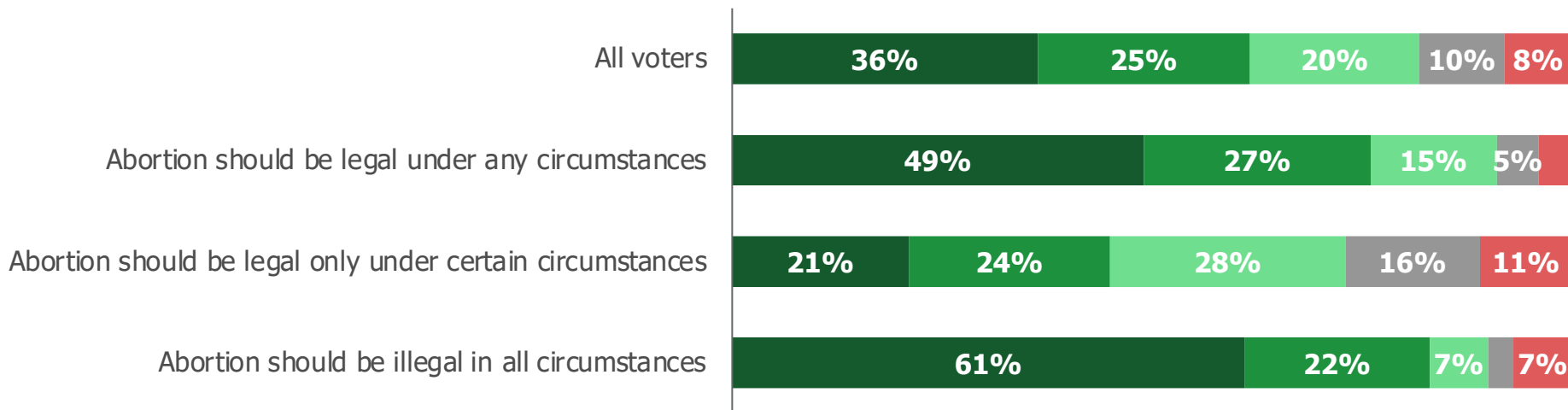
Subgroups: Women (n=555), 18-34 year olds (n=204), Liberal Democrats (n=168)

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

Voters with absolutist views on abortion give more weight to a candidate's views

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

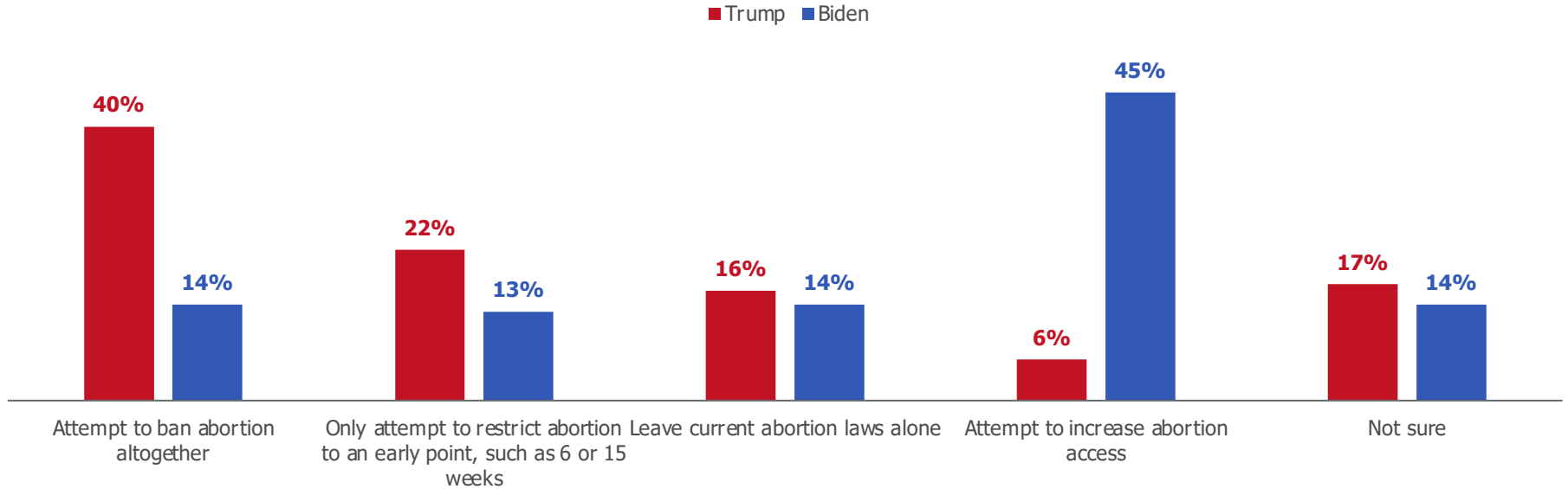


**Abortion is going to play
at least some role in
2024.**

Who is it going to help?

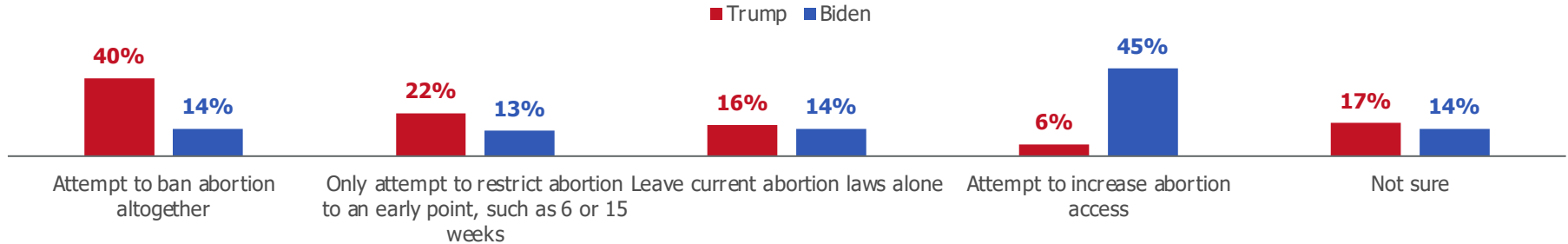
Most voters expect Trump to ban abortion entirely and Biden to increase access

Expectations for the Winner of the 2024 Election



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



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.



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Thank You

PHOENIX

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Research Methodology

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.

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

Region	
Maricopa	60%
Pima	17%
Rural	24%

Party Affiliation	
Democrat	30%
Independent	35%
Republican	35%

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

Gender	
Male	47%
Female	53%

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

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▶ **Quarterly**

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BEST POLLSTER



BEST NON-PARTISAN AZ POLLSTER



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‡
4. OH Predictive Insights	5	3.4	60	D+0.3



"pre-eminent pollster in the Southwest"

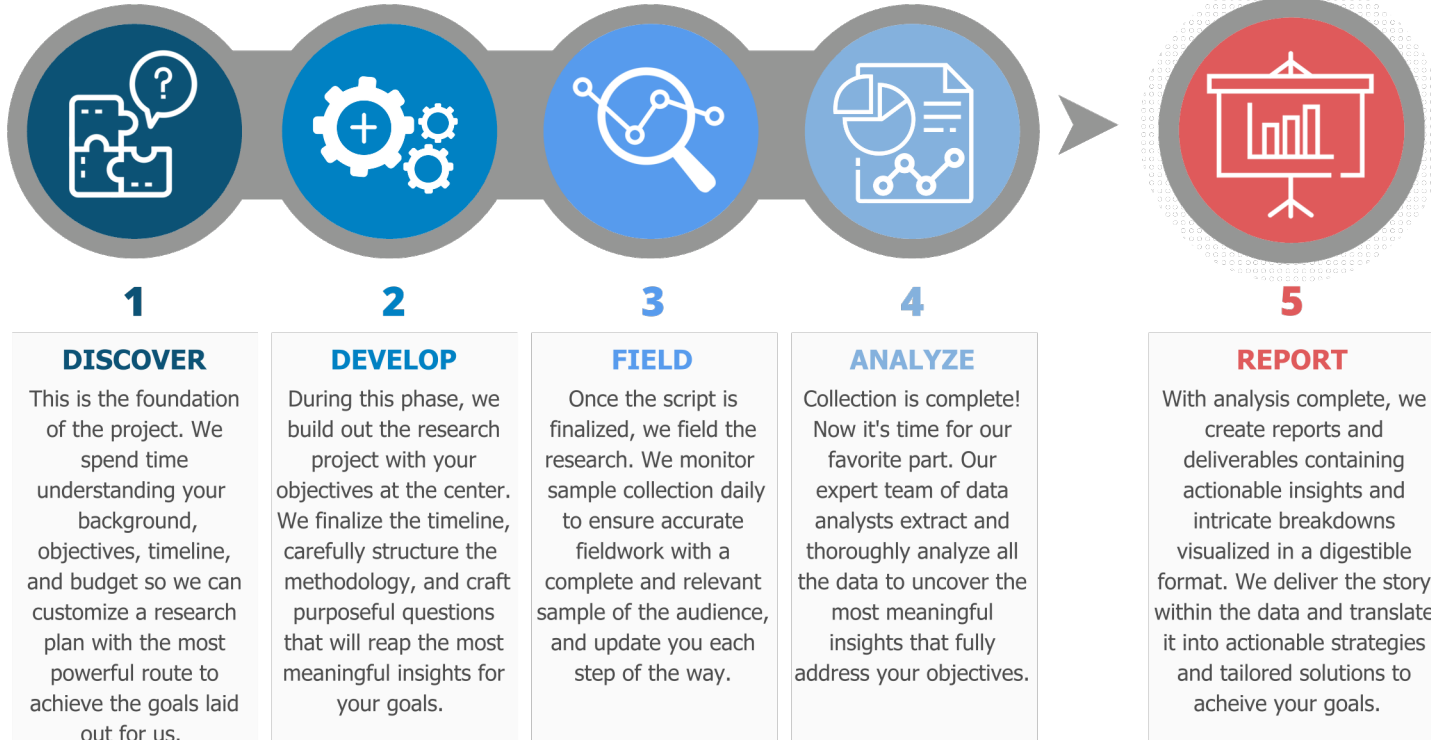


"Phoenix public-opinion expert" *The New York Times*

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



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/falling 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.

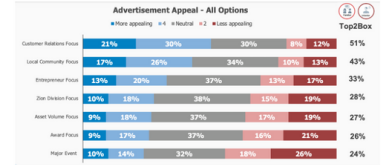
From the following list, please select the top three issues that you would say are the most important issues facing the country.

	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%	25%	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%	23%	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/falling 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

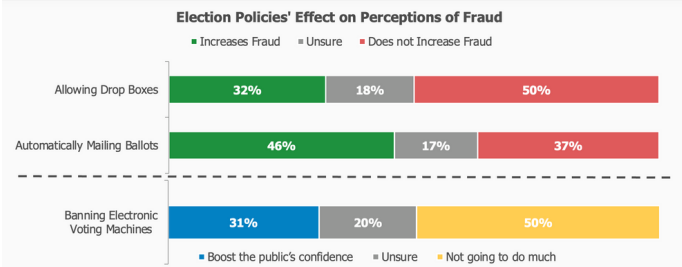
Key Takeaway: Most Maricopa professionals are not interested in seeing ads at sporting events, they also noted that the awards a bank has earned do not have a pull factor. However, they are drawn to an emphasis on customer service.



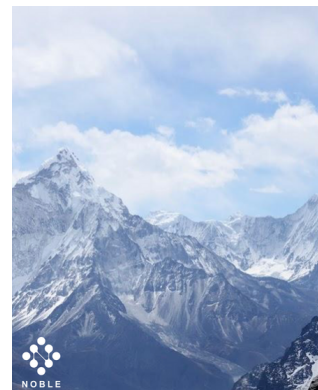
- An ad that runs during a sporting event or other significant public affairs was the least appealing across the board.
 - 44% of participants found it less appealing, 32% found it neutral, and 24% thought it appealing.
 - 16% of 65+ vs. 33% of 21-34 y/o
 - 28% of those who see themselves as entrepreneurs 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. 40% 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

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www.noblepredictive.com
info@noblepredictive.com

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)
 1 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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