



Memo: Arizona Voter Research - Sept 2026

This memo summarizes findings from a statewide survey conducted Sept. 1–9 2026 among 1,214 registered voters statewide, including 400 registered Latinos. Mode: 50% live calls, 50% text-to-web. MoE is 3.2% for the full sample and 4.9% for Latino registered voters.

Ad spending numbers on Facebook, Google/YouTube, Snapchat, Twitter, broadcast TV, and CTV via Priorities USA AdHawk & AdImpact, tracked through September 24. Spanish radio spend and reservations provided by Solidarity Strategies.

1. Katie Hobbs leads Andy Biggs (+7) in the Governor's race.

Governor Katie Hobbs holds a 49–43 (+7) advantage over Rep. Andy Biggs among Arizona likely voters. Hobbs is running a few points ahead of her 2022 levels, both overall (53% two way¹ vs. 50% in 2022) and among Latino likely voters, where she leads Biggs by 30 points (66% two-way vs. 63% in 2022²). Part of that increase comes from Trump 2024 voters moving away from the Republican coalition: she's winning roughly 10% of 2024 Trump voters in Arizona, a pattern that's even more pronounced among Latino Trump voters, 15% of whom back her. She has consolidated a wide lead among independents (+27), well beyond where a generic Democrat stands with this same group (+8).

2. Costs & the economy, and concerns about water, dominate Arizona's issue landscape. And a plurality of voters blame Trump – not Hobbs – for their financial hardship.

The economy and cost of living remain Arizona likely voters' top issue (33% for all, 43% for Latinos), with growing concern about water ranking a close second (23%).³ A plurality of likely voters (34%) explicitly blame Trump or the federal government for their financial strain, while less than 6% of voters place the blame on Hobbs and the state government.

Trump is currently underwater by nine points among likely voters statewide (44% approve–53% disapprove) and is especially unpopular with Latinos, 64% of whom disapprove of his performance compared to 32% who approve (–32).

Nearly 7-in-10 voters say energy costs have hit their household finances in the last year, including 75% of persuadable voters. And there's broad-based support for limiting how much utility companies can raise rates (87% support), and for regulating data centers, whether by putting a temporary pause on building new data centers (69%) or permanently eliminating their sales tax exception (69%).

¹ To calculate two-way support levels, undecideds in the race are allocated proportionally between the Democratic candidate & Republican candidate.

² According to Catalist "What Happened in 2022" estimates. Source: <https://catalist.us/whathappened2022/>

³ Top issue question was asked in open-ended format

3. Hobbs & allies hold a wide spending edge in the Governor's race, but GOP investment is picking up and an economic attack against Hobbs is effective, even against her own messaging.

As of late September, Hobbs and her allies have outspent Biggs and the GOP roughly 6:1 across TV, CTV, and digital, and are running virtually uncontested in Spanish-language ads (~\$2M vs. \$2.7k). That said, Republican spending has picked up recently: the Arizona GOP and Turning Point USA have both stepped up their ad efforts, with the majority of their spend concentrated in the first two weeks of September.

A Republican affordability attack on Hobbs⁴ performs strongly against messaging that highlights her economic record as Governor⁵ or her working-class background⁶, two frames her campaign has leaned on this cycle. This same poll showed that economic messaging that explicitly calls for "building an economy that works for everyone, not just the wealthy" and the need to make "greedy corporations and the wealthy elite" pay their fair share⁷ performs well against GOP messaging that calls for a government that "stays out of the way" and prioritizes "ending government waste, cutting taxes... and letting the free market drive growth and opportunity."⁸

4. Down-ballot statewide races in Arizona remain in a virtual tie.

Down ballot, the races for Attorney General, Secretary of State, and the generic congressional ballot are all essentially tied, each even or within margin of error.

- **Secretary of State:** Fontes 46% vs. Kolodin 44% (+2 Dem) among all likely; 57%-30% (+27) among Latinos
- **Attorney General:** Mayes 45% vs. Petersen 45% (even) among all likely; 56%-32% (+24) among Latinos
- **Generic Congressional Ballot:** Dem 45% vs. GOP 45% (-1) among all likely; 56%-32% (+23) among Latinos
- In the **Corporation Commission** race, where voters choose 2 of 4 candidates, the Democratic slate has a slight advantage (34%) over the Republican slate (28%) in party-line vote, but nearly 37% remain undecided on at least one of the two slots.

⁴ "Katie Hobbs claims she understands what working families are going through, but her policies have made Arizona more expensive. She pushed for increasing the gas tax and vetoed tax cuts three times, even as families struggle with high costs for gas, housing, utilities, and groceries. Under her leadership, Arizona has dropped from being one of the most affordable states in the country to now being the seventh least affordable state."

⁵ "As governor, Katie Hobbs focused on making day to day life more affordable. She lowered the cost of childcare and groceries, canceled a billion dollars in medical debt for over six hundred thousand Arizonans, and expanded homeownership opportunities. Katie Hobbs believes that when you work hard you should be able to afford the basics and get ahead. That's why she's fighting to lower costs and deliver real solutions for Arizona's families."

⁶ "Katie Hobbs worked at Burger King and Pizza Hut to pay for school, and while raising her kids drove Uber to afford their Christmas presents. Katie Hobbs understands the financial pressures working families are facing and believes that when you work hard, you should be able to afford the basics and get ahead. That's why every day as governor, she's fighting to lower costs and deliver real solutions for Arizona's families."

⁷ "Arizona needs leaders that are focused on building an economy that works for everyone, not just the wealthy. We should make the wealthy elite and greedy corporations pay their fair share so our tax money can help people succeed by strengthening our healthcare and bringing down grocery, utility, and housing costs. A strong economy comes from working people doing well and having money to spend in their communities."

⁸ "Arizona needs leaders that understand people would be better off with a government that stays out of the way. Arizona should prioritize fiscal responsibility, ending government waste, cutting taxes, and reducing red tape so that businesses can promote innovation and create jobs in the state. A strong economy comes from letting the free market drive growth and opportunity for everyone, without the government."

Name recognition for candidates downballot still has a long way to go. For instance, 36% of likely voters are unfamiliar with Mayes, and 48% are unfamiliar with Petersen. This runs even higher among Latinos: 42% can't rate Mayes, and 54% can't rate Petersen. There's real room for either side to define these candidates before Election Day.

5. Nearly 1-in-5 voters in Arizona – and 1-in-4 Latinos – are swing voters.

About 18% of Arizona voters, including 23% of Latinos, remain persuadable.⁹ This is a cross-pressured group: a plurality identify as Republican or lean Republican (43%), but a majority disapproves of Trump's performance so far (35% approve–58% disapprove), and also views Hobbs positively (51% approve–31% disapprove).

In the Attorney General's race, women under 40 stand out as a persuasion target for Mayes: 18% of young women remain undecided, versus 12% in the Governor's race, and Mayes trails behind Hobbs and a generic Democrat among this group (56% support for Mayes vs. 65% for Hobbs).

6. The GOP has outspent Democrats in AZ-06 while Democrats have outspent Republicans in the AG race, AZ-01 and AZ-02. Spanish-language advertising remains limited in some of these races.

Mayes and her allies have outspent Petersen and the GOP 3:1¹⁰, with little to no spending in Spanish-language advertising on either side (~\$51k for Mayes, \$0 for Petersen). Petersen has yet to face any negative ads as Mayes and allies have focused on positive and contrast.¹¹

Democrats have outspent Republicans in AZ-01 and AZ-02, while Republicans hold the spending edge in AZ-06, driven in part by spending from outside groups.¹² Nearly all Spanish-language advertising has come from Democrats, and it has been limited overall in some of these races: Neither side has run Spanish ads in AZ-01; and in AZ-06, a GOP-Tossup with 21% Latino CVAP, only about \$21k has gone to Spanish-language ads (plus \$153k in radio buys until E-day) compared to more than \$4 million in English.

⁹"Persuadable" is defined as voters who are undecided in either the Governor's race or the Generic Congressional Ballot; who are ticket-splitting between the two races; or who supported one party in 2024 and a different party in 2026.

¹⁰ Platform spending includes Facebook, Google, Snapchat, Twitter, Linear and CTV, launched from 07/21 through 09/24

¹¹ In this poll, we tested some abortion messaging for the Attorney General's race, and found that a negative message about Petersen's position on abortion was slightly more effective at moving voters away from him than a positive abortion message about Mayes.

¹² Platform spending includes Facebook, Google, Snapchat, Twitter, Linear and CTV, launched from 07/21 through 09/24