

The Arizona We Want: The Decade Ahead

INSIGHTS FROM THE 2020
GALLUP ARIZONA SURVEY

GALLUP



CENTER
FOR THE FUTURE OF
ARIZONA

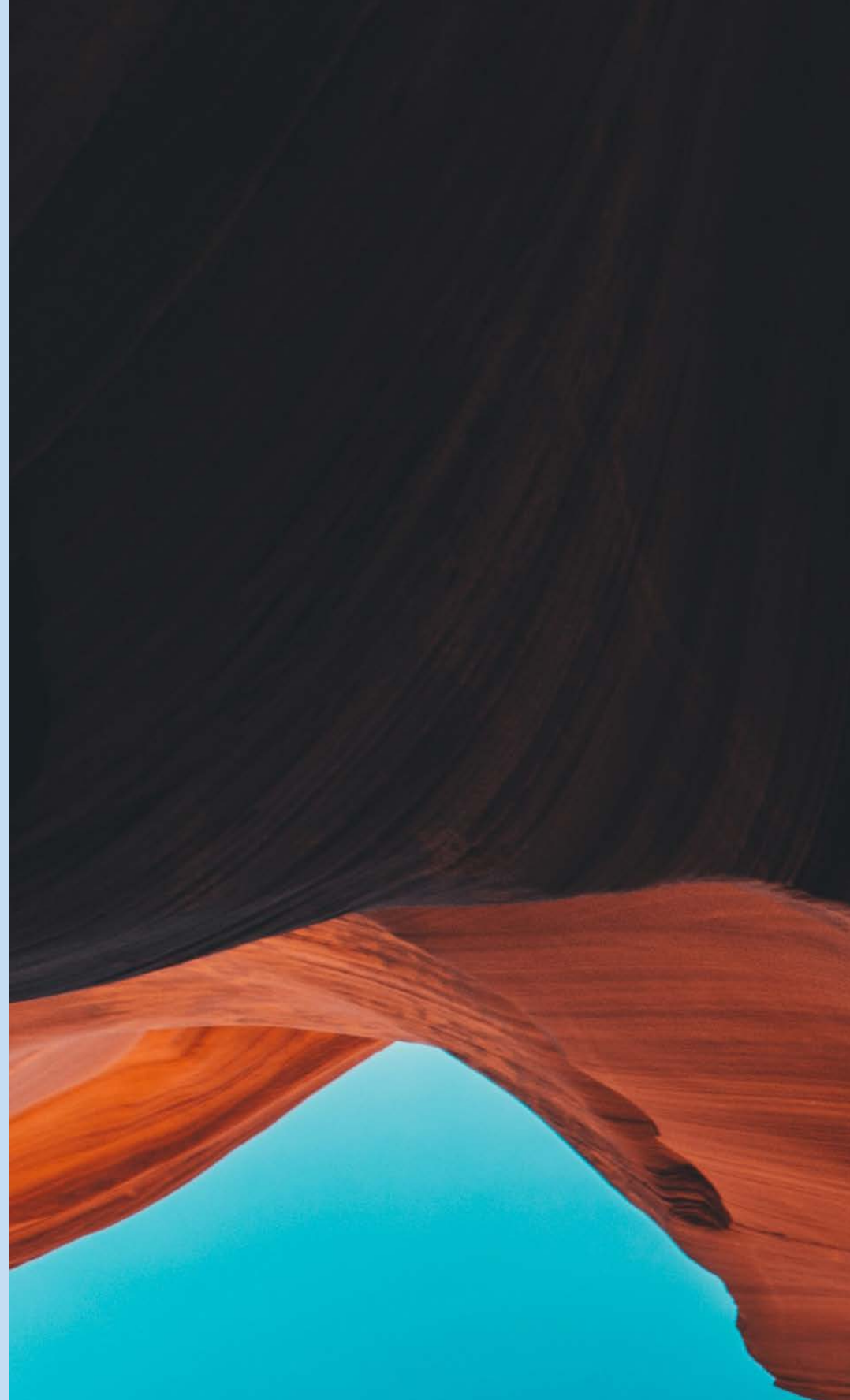
COPYRIGHT STANDARDS

This document contains proprietary research, copyrighted and trademarked materials of Gallup, Inc. Accordingly, international and domestic laws and penalties guaranteeing patent, copyright, trademark and trade secret protection safeguard the ideas, concepts and recommendations related within this document.

The materials contained in this document and/or the document itself may be downloaded and/or copied provided that all copies retain the copyright, trademark and any other proprietary notices contained on the materials and/or document. No changes may be made to this document without the express written permission of Gallup, Inc.

Any reference whatsoever to this document, in whole or in part, on any webpage must provide a link back to the original document in its entirety. Except as expressly provided herein, the transmission of this material shall not be construed to grant a license of any type under any patents, copyright or trademarks owned or controlled by Gallup, Inc.

Gallup® is a trademark of Gallup, Inc. All rights reserved. All other trademarks and copyrights are property of their respective owners.



Contents

02	Letter From Sybil Francis	72	The Arizona We Build: A Call to Action
03	Executive Summary	79	Methods
06	Introduction	82	Acknowledgements
08	Arizona's Decade of Change	84	Endnotes
18	The Outlook of Arizonans on the Future		
25	Our Shared Public Values		
27	Education		
35	Health and Wellbeing		
42	Jobs and Economic Opportunity		
50	Environment and Sustainable Future		
56	Civic Engagement and Leadership		
63	Fair, Just and Equitable Systems		
69	Immigration Reform		

Letter From Sybil Francis

I fell in love with Arizona's natural beauty and stunning landscapes when I moved here from the east coast with my husband nearly 20 years ago. Since then, I have also come to love and appreciate many other things about Arizona — the independent spirit and innovative thinking, the rich culture and history, the feeling of possibility. I feel fortunate to lead an organization that is committed to Arizona and to creating a stronger and brighter future for our state.

You will hear the voices of Arizonans speak loudly and clearly in this report. It paints a vivid picture of Arizonans, proud to call this state home, who believe in equity and justice for all, understand the importance of a strong education system to the success of our state, and want leaders who listen and lead. Arizonans agree on these things and much more. In fact, Arizonans agree more than they disagree on important issues, contrary to the national narrative about deep divisions in our country. I hope you will find hope and inspiration in learning that Arizonans from across the state, in rural, as well as urban, communities, and of all ages, incomes, races and ethnicities share much common ground.

I am inspired by what I have learned about Arizonans, especially about our young people who want to make the world a better place and who are hungry for opportunities to further their education, grow their careers and build their lives. They need education and training, healthy and affordable places to live and quality childcare to help them succeed.

An endeavor like this one, almost two years in the making, requires many partners. I am grateful to all who took this journey with us. They are listed at the end of the report. They include over 40 individuals from across the state who provided feedback on early drafts and others who helped develop survey questions. The final product is stronger because of each of them. I thank the CFA Board of Directors for their support and guidance. Our partners at Gallup — the gold-standard purveyors of public surveys — more than delivered on their promise. Thank you to our funding partners who believe in Arizona. Finally, I am so grateful for the incredible dedication and hard work of my CFA colleagues and their commitment to Arizona.

The enclosed report is a product of the Center for the Future of Arizona, in partnership with Gallup. It now belongs to Arizona and to all of you. The work ahead is more than any one person or organization can accomplish. It is up to all of us to come together to make change happen. I hope you will read this report and find cause for hope and reason for action. The task ahead — for each of us, as individuals, in our families, in our communities, businesses and workplaces, and as leaders — is to act on these findings to realize *The Arizona We Want*.



SYBIL FRANCIS, PH.D.

President & CEO

Center for the Future of Arizona

Executive Summary

The voices of Arizonans, and what they want, matter. In *The Arizona We Want: The Decade Ahead*, the Center for the Future of Arizona shares data and insights about what we learned from the 2020 Gallup Arizona Survey. The results show that, as Arizonans, we agree on much more than we disagree and that we want the same things, including a strong education system, quality affordable healthcare, sustainable practices that protect our quality of life and equity for all people.

Fielded in an unprecedented year during the late summer and early fall of 2020, in a time of reckoning about racial inequality and social justice, and amid a pandemic, the 2020 Gallup Arizona Survey results show that our strongly held beliefs — our shared public values — withstand time and changing circumstances. In this report, we share our findings about what matters most to Arizonans as they look ahead to the next 10 years, bring visibility to where we have work to do, and name the actions Arizonans agree are most needed to create a stronger and brighter future for Arizona.



These findings give voice to our common thoughts and aspirations and help us become reacquainted with the threads that run through each of us. They should guide the work of every single one of us as Arizonans.

EILEEN KLEIN

*35th State Treasurer of Arizona
and President Emerita
Arizona Board of Regents*

Major Findings

Most Arizonans are proud to live in Arizona, but many are uncertain about the state's future.

Seven in 10 (70%) Arizonans are proud to live in Arizona, while just 12% disagree with that statement. However, only 44% of respondents agree the state is heading in the right direction. College-educated millennials are less likely than other respondents to be optimistic, with only 32% agreeing. Further, only 42% of Arizonans under 35 with postsecondary education believe Arizona is a great place to raise children.

Arizonans overwhelmingly agree on seven shared public values.

For the purposes of this study, shared public values are defined as issues on which at least 70% or more of Arizonans agree — with strong support across geography, income, education level, political affiliation, and race or ethnicity. Drawn from the data, the shared public values clearly identify, with great confidence, where we agree and what Arizonans want. They provide the basis for *The Arizona We Want*.

Our Shared Public Values

1 EDUCATION

a highly educated and skilled population

2 HEALTH AND WELLBEING

affordable healthcare that covers preexisting conditions and provides accessible mental health services

3 JOBS AND ECONOMIC OPPORTUNITY

good-paying jobs and the education and training needed for all Arizonans to fully participate in a vibrant economy

4 ENVIRONMENT AND SUSTAINABLE FUTURE

sustainable practices that protect our air, land and water, and support a high quality of life for all

5 CIVIC ENGAGEMENT AND LEADERSHIP

civic engagement that solves problems and democracy that works for all

6 FAIR, JUST AND EQUITABLE SYSTEMS

fair, just and equal treatment of all people

7 IMMIGRATION REFORM

comprehensive immigration reform, including a pathway to citizenship and support for “DREAMers”

Arizonans agree on what we want for the future, but we have not yet realized these aspirations for all Arizonans.

The findings from the study clearly show we have deeply shared concerns about the future for our state and what life will be like for future generations, as well as frayed trust in one another and our leaders to fully achieve these goals. These difficult realities illuminated by the data lend urgency and clarity to where further examination and work is needed.

Areas of shared concern include:

- 26%** Only about one in four (26%) agree that the state's K-12 public education is high quality.
- 55%** Only 55% of residents in rural areas have access to broadband/high-speed internet in their homes, which is critical to virtual learning and employment.
- 28%** Only 28% of Arizonans agree race relations are good. A majority of Black Arizonans (53%) say they have felt discriminated against because of their race in the past 12 months. About four in 10 Latino (39%), Asian (39%) and American Indian (38%) Arizonans also respond this way.

Arizonans want action.

Throughout the 2020 Gallup Arizona Survey, respondents were asked about what actions they thought were important for Arizona to take over the next 10 years. The result is a set of more than 40 actions that are overwhelmingly supported by Arizonans to move our state forward.

Here are just a few of the many actions with strong support and broad consensus:

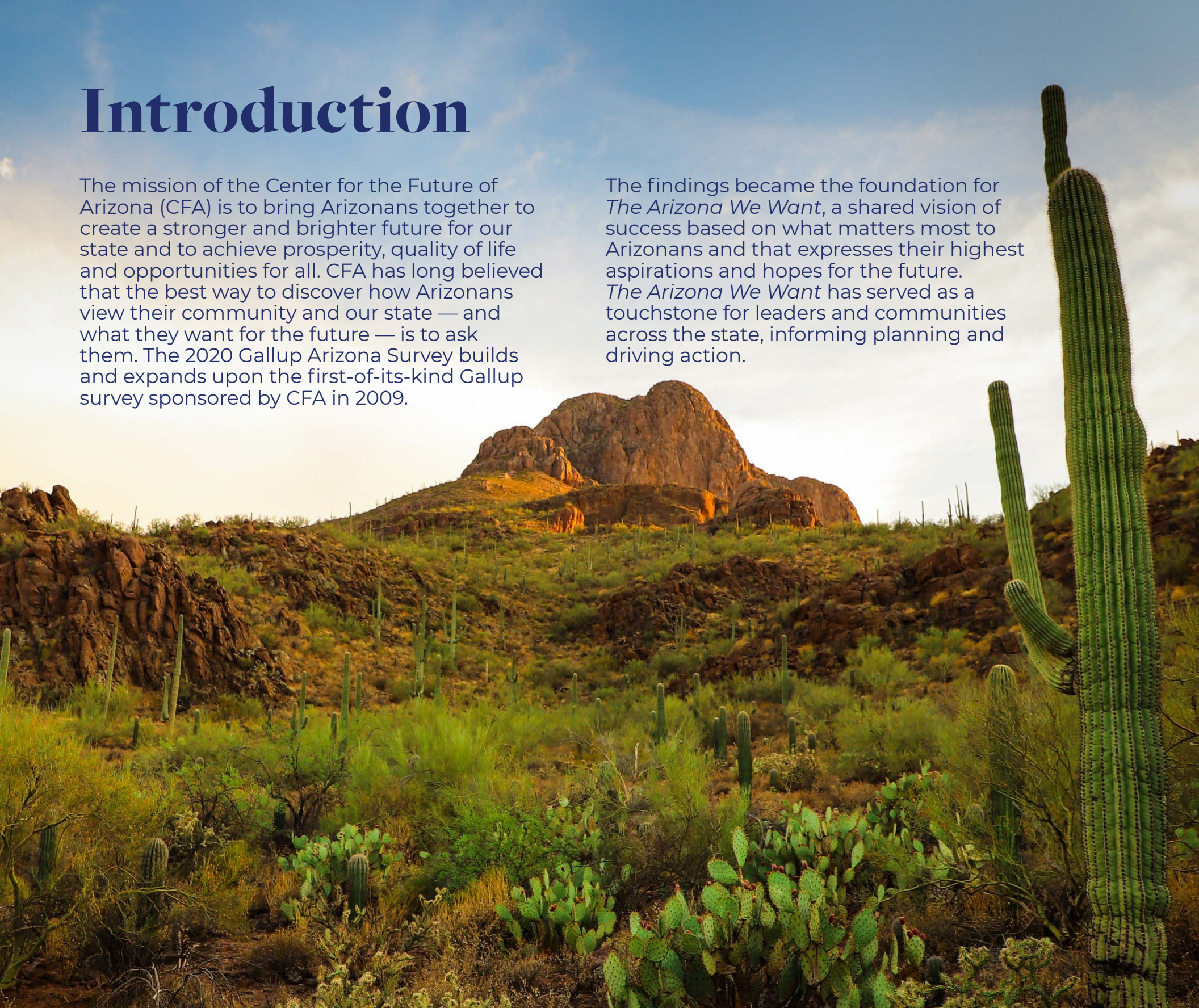
- 79%** believe action is needed to close gaps in educational outcomes for our most vulnerable populations of children who are low-income, have disabilities and/or are English language learners.
- 85%** support making mental health services available and affordable for all Arizonans who need them.
- 85%** support putting regulations in place to protect rural water supplies.

No one person, organization, leader or agency is responsible for moving our state forward. That job rests with all of us, coming together to create a stronger and brighter future for our state. This report and the findings it contains give voice to our shared hopes and aspirations for Arizona and invite us to act. There is a role for each of us to play in achieving *The Arizona We Want*.

Introduction

The mission of the Center for the Future of Arizona (CFA) is to bring Arizonans together to create a stronger and brighter future for our state and to achieve prosperity, quality of life and opportunities for all. CFA has long believed that the best way to discover how Arizonans view their community and our state — and what they want for the future — is to ask them. The 2020 Gallup Arizona Survey builds and expands upon the first-of-its-kind Gallup survey sponsored by CFA in 2009.

The findings became the foundation for *The Arizona We Want*, a shared vision of success based on what matters most to Arizonans and that expresses their highest aspirations and hopes for the future. *The Arizona We Want* has served as a touchstone for leaders and communities across the state, informing planning and driving action.



Arizona has changed in the past 10 years, which is why it was time to update our earlier Gallup results and refresh *The Arizona We Want*. With just over 3,500 respondents, the 2020 Gallup Arizona Survey is one of the most comprehensive and representative surveys of its kind in the state. The sample size is large because we wanted to be able to speak with great confidence about our results and paint a full picture of the views of Arizonans across the state. CFA partnered with Gallup — the best known and most widely respected name in the world for gathering and reporting public opinion — to develop the 2020 Gallup Arizona Survey.

THE FOUR SECTIONS OF THIS REPORT:

- 1 **“Arizona’s Decade of Change”** describes the state’s growth in the last decade, shifting demographics, and current conditions of urban and rural Arizona.
- 2 **“The Outlook of Arizonans on the Future”** delves into how connected Arizonans feel to the state and their views on where it is headed. It also takes a closer look at younger Arizonans’ outlook on the state, an important demographic critical to the state’s job growth and economy.
- 3 **“Our Shared Public Values”** is the heart of the report, with a full discussion of the shared public values of Arizonans, where there are gaps between desired outcomes and the lived realities of Arizonans, and areas of consensus on actions that need to be taken over the next 10 years.
- 4 **“The Arizona We Build: A Call for Action”** lays out the agenda for driving our state forward. This section reflects on some of the more troubling findings of the survey and shows how everyone and every part of our society can play a role in achieving *The Arizona We Want*.



As a lifetime Arizonan, I was pleased to see not only the extent of the shared interests of Arizonans but also their desire to come together for the greater good of all.

LATTIE F. COOR

*Chairman & Founding Director
Center for the Future of Arizona*

Arizona's Decade of Change

The 2020 Gallup Arizona Survey finds the state at an important juncture. Since the previous survey in 2009, the state has experienced tremendous changes, bringing unique challenges and opportunities. **The Arizona population increased by almost 16% from 2010 to 2020**, one of the highest growth rates in the country.¹



Arizona's growth over the last decade reflects the state's unique advantages and geography. The state's natural beauty, rich culture and warm, dry climate make it a popular destination for retirees. Its forward-looking economy and low cost of living have also drawn many younger people in high-tech fields.² Arizona is home to 9,000 technology companies, with many Arizonans employed in the satellite communications, semiconductor and aerospace industries.

Across Arizona, there are 22 federally recognized Indian tribes, each having their own individual and respective tribal governments, tribal enterprise operations, and reservation lands and/or communities. The 22 tribes in Arizona live in diverse geographical locations. These communities operate as sovereign nations that control approximately 28% of the land base within the state of Arizona, and tribal nations are often the largest employers within the counties where they reside. Tribal leaders work together to lead advocacy efforts on critical policy issues impacting all tribes in the state of Arizona and beyond.³

From 2012 to 2018, a yearly average of about 250,000 people migrated to Arizona from other states.⁴ In addition, the state's proximity to Mexico draws thousands of Latino immigrants.

Both domestic and international migrants⁵ have contributed to the state's healthy economic growth. Arizona had a five-year annualized GDP growth rate of +3% through Q1 2020, the fifth highest among the 50 states.⁶

Arizona's rapid growth has also put new pressure on leaders to effectively manage the state's resources, protect its natural spaces and other assets, and provide equitable access to essential services. The path forward requires leadership with the long-term vision required to maximize the benefits of growth for all Arizonans, while keeping up with its demands.

Notably, the 2020 Gallup Arizona Survey was fielded during a unique time in our nation's history: The COVID-19 pandemic was causing one of the most severe health and economic crises in recent memory, the death of George Floyd and other unarmed Black men and women at the hands of law enforcement had sparked a nationwide dialogue on racial justice and sustained demonstrations across the country, and a highly partisan presidential election was underway.



We must take a greater interest in key issues affecting the Latino community — including education, affordable housing, healthcare, economic and workforce development, and civic engagement. Arizona's future is tied to the Latino future, as well as other underserved and undervalued communities.

DAVID ADAME

President & CEO

Chicanos Por La Causa

Changing Demographics

Arizona is currently home to about 7.4 million people, up from about 6.4 million in 2010 — an increase of almost 16%.⁷ In contrast, the U.S. population overall only grew about 8% during that period.⁸ The state has always been rich with ethnic and cultural diversity. We know that, since Arizona became a state in 1912, at least 60% of Arizonans have come from elsewhere.⁹ Census data indicate that, overall, Arizona took in 2.2 million new residents from other states between 2010 and 2018, while losing 1.7 million to other states.¹⁰ The net gain for Arizona in terms of migration between states has been an important source of job growth; between 2010 and 2020, the number of jobs in Arizona grew by about 21% to almost 3 million.¹¹

The other major source of Arizona's population growth is international migration; about 13% of Arizonans were born in another country and 16% are native-born Americans with at least one immigrant parent. Mexico eclipses all other countries of origin for immigrants in Arizona at 55%, followed distantly by Canada (4%), India (4%) and the Philippines (4%).¹² International migrants tend to skew younger, offsetting the older skew of domestic migrants, making the median age of Arizonans about the same as that of Americans overall, at 38.3.¹³

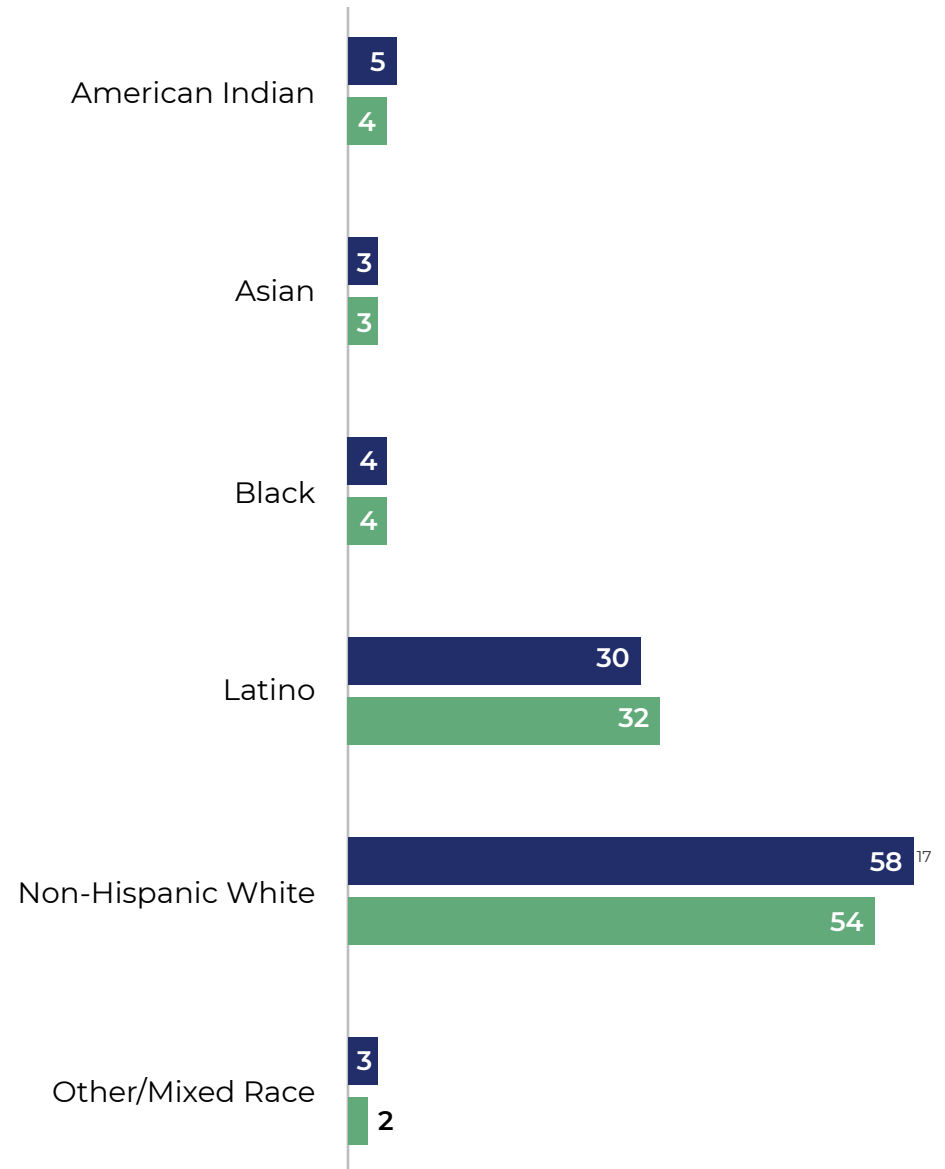
Arizona's racial and ethnic makeup has changed in the past decade. Latinos make up 32% of the state's population, up from 30% in 2010. According to Census data from 2020, a narrow majority of Arizonans are non-Hispanic White (54%), while Black and American Indian residents each represent about 4%.¹⁴ If current population trends continue, Arizona is expected to become a majority-minority state by 2027¹⁵ — meaning no single racial or ethnic group will represent a majority of Arizonans.

CHART 1:

Arizona's Population, by Race/Ethnicity, 2010 vs. 2020

U.S. Census¹⁶

● % 2010 ● % 2020



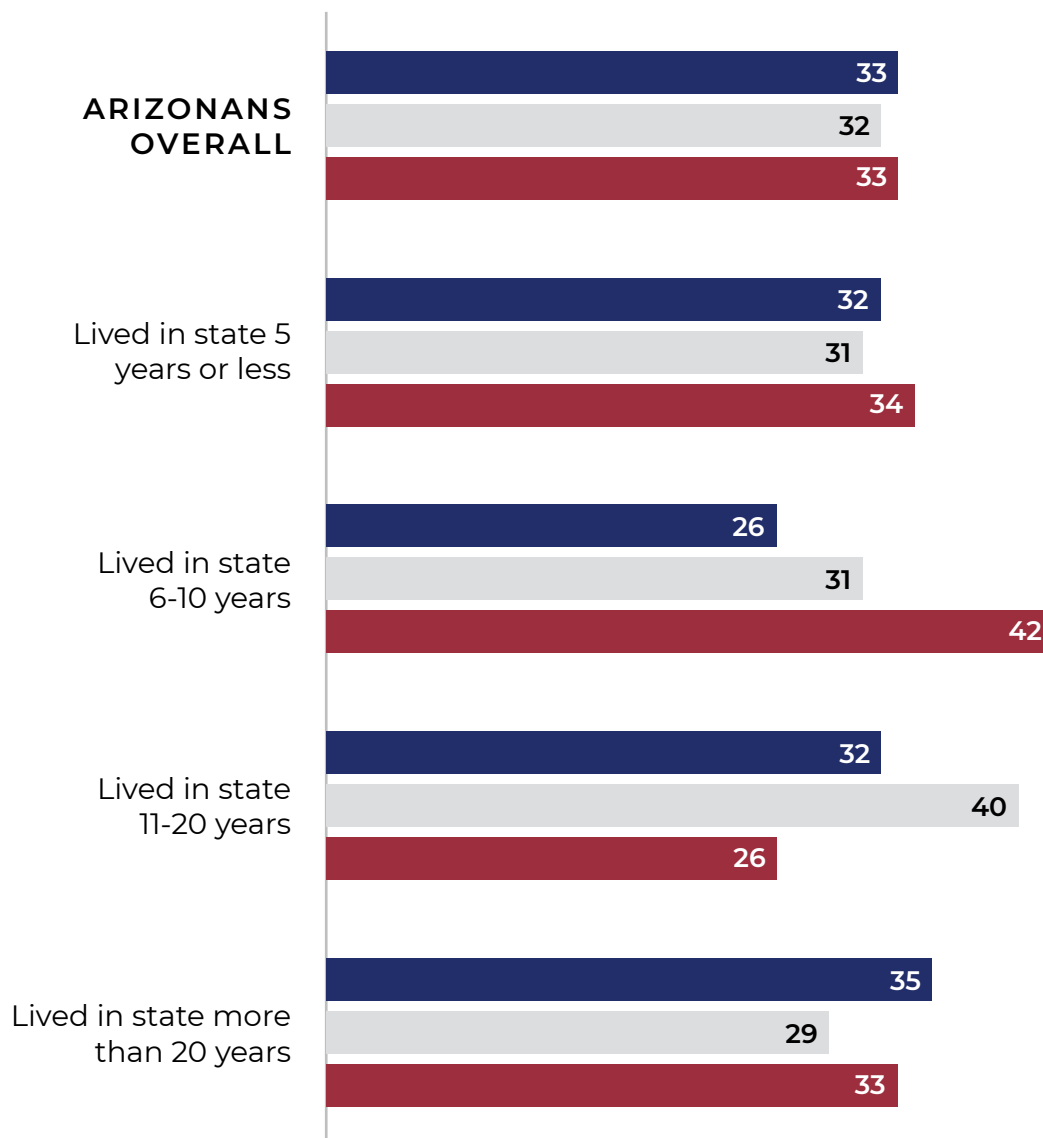
Despite heavy migration into Arizona in recent years, the 2020 Gallup Arizona Survey findings show that the priorities and political outlook of newer residents are largely similar to those of long-time Arizonans. For example, though Arizonans' politics have become more divided between Democrats and Republicans in the past decade, self-reported political affiliation is similar among those who have lived in the state five years or less and those who have lived here for more than 20 years.

CHART 2:

In politics, as of today, do you consider yourself a Republican, a Democrat or an independent?

Results by length of tenure in Arizona

● % Democrat ● % Republican ● % Independent



Growth and Change Across the State: Urban and Rural Arizona

Arizona's cities have changed dramatically over the past decade. Phoenix alone has added more than 234,000 residents to its population from 2010 to 2019, the largest numeric increase of any city in America.¹⁸ Pinal County, in the urban corridor between Phoenix and Tucson, has been the fastest growing in the state on a percentage basis, with a 22% population increase between 2010 and 2019.¹⁹ However, many rural communities across the state have experienced slow growth, or even population loss, during this time period.²⁰ Rapid growth has brought many new jobs and economic opportunities to the state's cities,²¹ as well as challenges, like increased housing costs, continuing drought, poor air quality²² and rising heat levels.

The state's job growth over the past decade has primarily been centered in the Phoenix area — especially in cities to the west of Phoenix, like Buckeye and Goodyear.²³ In part reflecting Phoenix's economic development, the current survey finds that average incomes are significantly higher in Maricopa County than elsewhere in Arizona. For example, 40% of Arizonans outside of Maricopa County report household incomes under \$36,000, compared with 27% of Maricopa County residents.

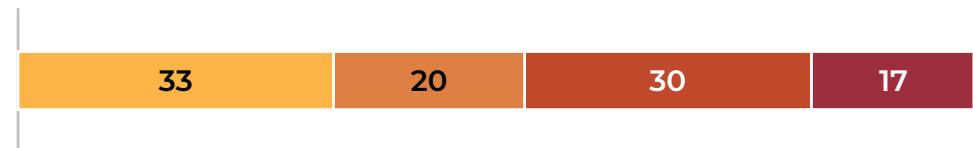
Household income differences are also reflected in employment results from Arizonans living in urban vs. rural areas; among residents age 25 to 64, 61% of those living in urban counties say they are employed full time, compared with 40% of those in rural counties.

CHART 3:

What is your total annual household income, before taxes?

- % Less than \$36,000
- % \$36,000-<\$60,000
- % \$60,000-<\$120,000
- % \$120,000 or more

ARIZONANS OVERALL



Arizonans outside Maricopa County



Maricopa County residents



Job Losses and Economic Hardship Across the State, Especially in Northern Arizona

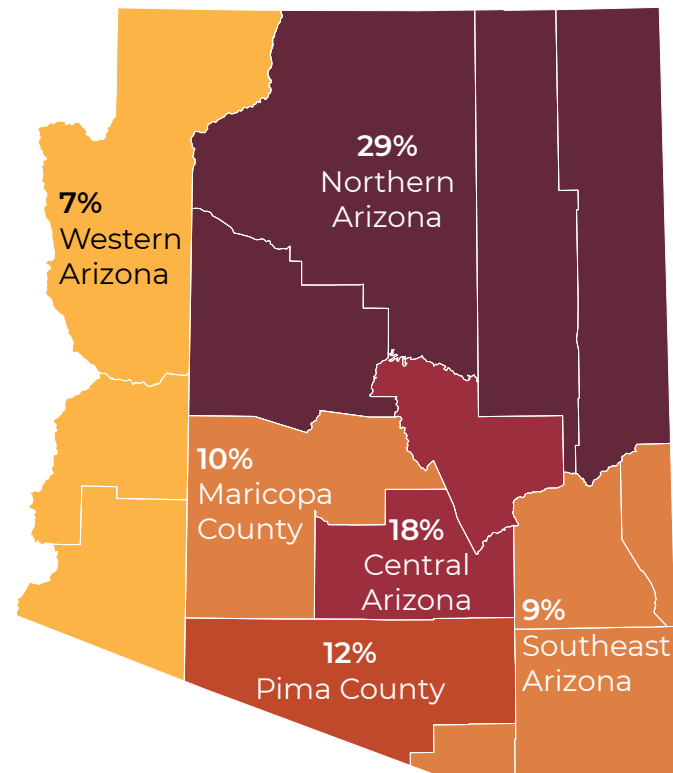
The coronavirus pandemic has led to job losses in all areas of the state and, overall, 13% of Arizonans in the labor market said they had been permanently laid off as a result of COVID-19. This figure rises to 29% among those living in the state's northern regions, including Yavapai, Coconino, Navajo and Apache Counties. Northern Arizonans are also more likely to say they have seen a loss of income as a result of the pandemic. Much of Northern Arizona consists of American Indian tribal areas; correspondingly, 32% of American Indian residents statewide said they had been permanently let go as a result of COVID-19, compared with 11% of White residents, 16% of Latino residents and 6% of Black residents.

29% of workers in Northern Arizona were permanently let go as a result of the COVID-19 pandemic.

CHART 4:

Percentage of Labor Market Participants in Each Region Who Say They Were Permanently Let Go as a Result of COVID-19*

% 7 ● ● ● ● ● % 29



* Regional groupings are constructed as follows: Northern Arizona includes Apache, Coconino, Navajo and Yavapai counties; Western Arizona includes La Paz, Mohave and Yuma counties; Central Arizona includes Gila and Pinal counties; and Southeastern Arizona includes Cochise, Graham, Greenlee and Santa Cruz counties.

Arizonans Felt the Impact of the COVID-19 Pandemic on Economic Stability

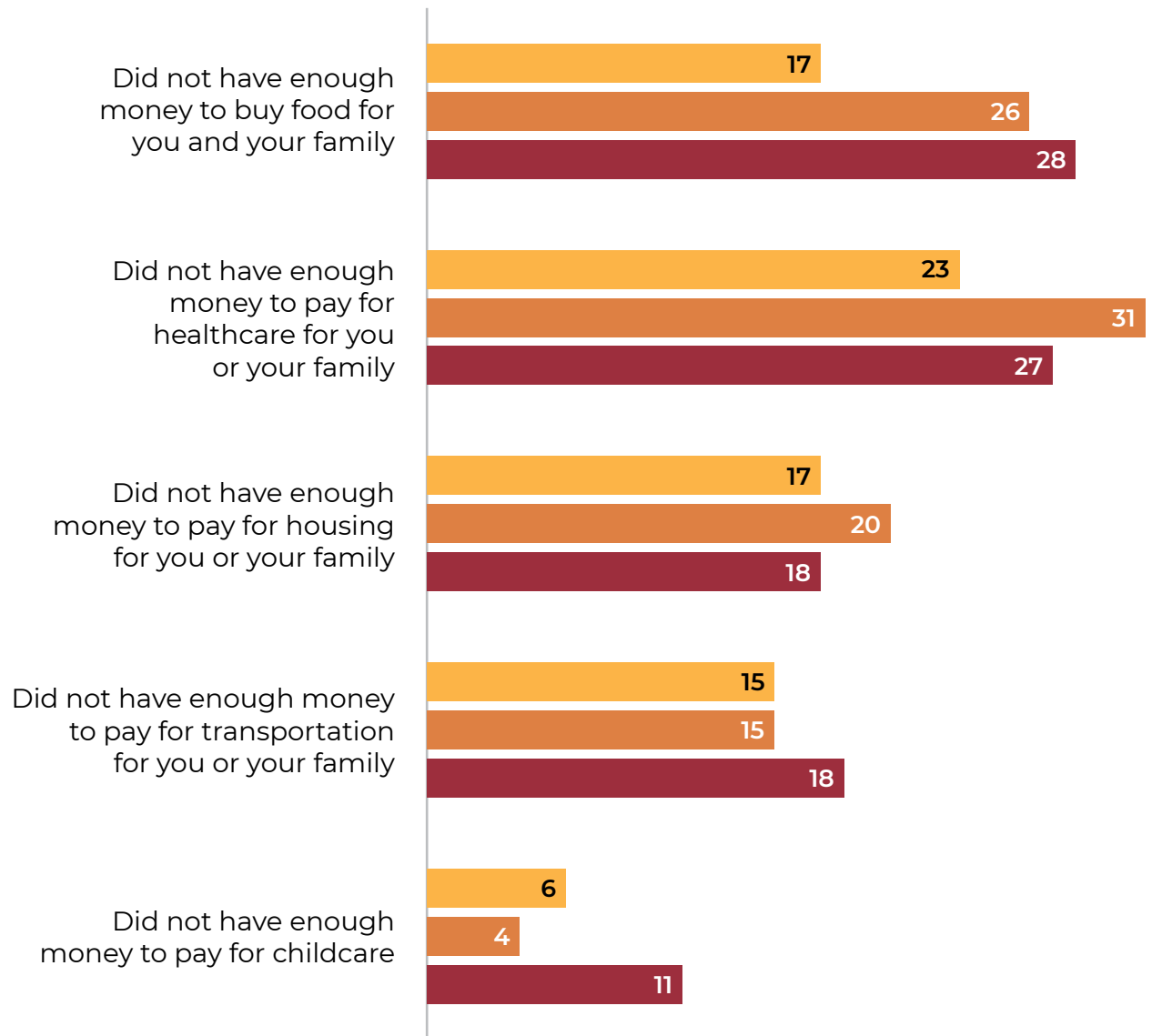
As in the U.S. overall during 2020, amid the COVID-19 pandemic, many Arizonans have had trouble making ends meet. Nineteen percent of Arizonans say there have been times in the past year when they could not afford to pay for food for themselves or their families. This is identical to the proportion of Americans overall who said the same in a separate Gallup survey in 2020.²⁴ The 2020 Gallup Arizona Survey also found that 25% of Arizonans lacked enough money to pay for healthcare at times in the past year, while 18% lacked enough to pay for housing. This means that nearly 1.4 million Arizonans did not have enough money to pay for healthcare, and just over 1 million did not have enough money to pay for housing in the past year.

Additionally, economic hardship is reflected in the number of rural Arizonans who had difficulties paying for basic needs over the last year.

CHART 5:

Have there been times in the past 12 months when you ____?

● % Mostly urban areas ● % Midsized communities ● % Mostly rural areas



Rural Communities Are Less Satisfied With Infrastructure

Rural communities report less satisfaction than their urban counterparts when it comes to their outlook on the state's infrastructure, in particular, transportation and broadband infrastructure. For example, although nearly 68% of Arizonans overall rate the highways and interstates as "excellent" or "good," only 54% of rural Arizonans feel this way.

Overall, less than half of Arizonans (44%) rate their city streets as excellent or good, and this figure falls to just 30% among those who live in rural areas.

Satisfaction with city streets is not high overall, and there is also a sizable difference in the outlooks between Arizona's two largest Metropolitan Statistical Areas (MSAs), Phoenix and Tucson.

While just over half of Phoenix-area residents (54%) rate their city streets as "excellent" or "good," only 16% of Tucson-area residents are satisfied with their city streets. Tucson residents are also less likely to rate walkability (including sidewalks and crosswalks) highly, with only 41% of Tucson residents satisfied with the walkability of their city, vs. 60% of Phoenix residents.

TABLE 1:
How do you rate Arizona's transportation systems on each of the following?
% "Excellent" or "Good"

	ARIZONANS OVERALL	Urban areas	Midsized communities	Rural areas	Phoenix MSA	Tucson MSA
Airports	78%	81%	72%	58%	84%	71%
State highways and interstates	68%	71%	63%	54%	74%	59%
Walkability (e.g., sidewalks, crosswalks)	56%	58%	51%	48%	60%	41%
Bike lanes	51%	53%	43%	43%	52%	57%
City streets	44%	46%	43%	30%	54%	16%
Public transportation	39%	40%	42%	33%	41%	35%

Many Rural Arizonans Lack Access to High-Speed Internet

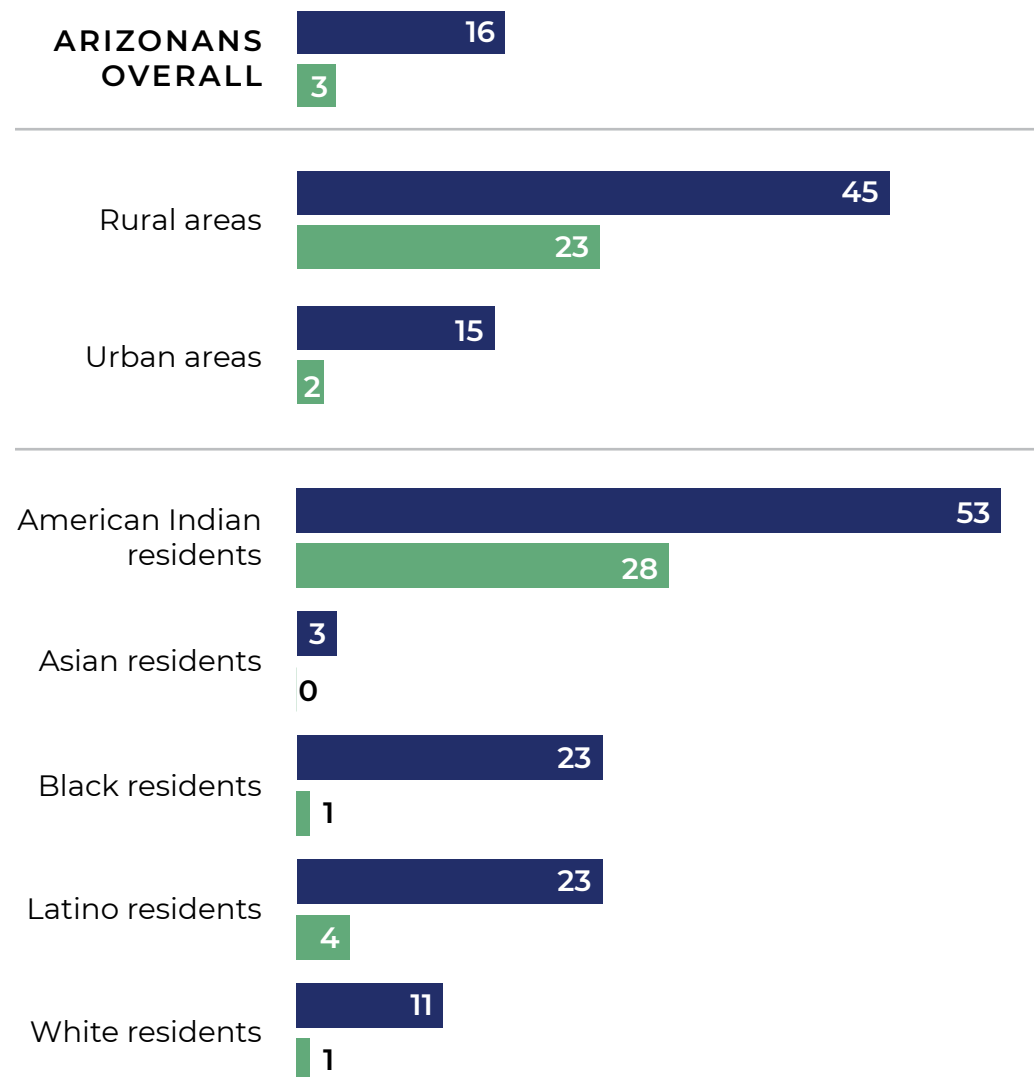
Overall, 84% of Arizonans say they have high-speed internet at home, while 9% have only a cell phone data plan, 1% have dial-up internet and 6% do not have internet access of any kind at home. However, these figures vary substantially between urban and rural areas, and among racial/ethnic groups.

Across rural counties (including Apache, Gila, Graham, Greenlee, La Paz, Navajo and Santa Cruz counties), almost half (45%) say they do not have high-speed internet and almost one-fourth (23%) say it's because high-speed service isn't available in their area. Access to the internet is especially challenging for American Indians in Arizona, with 53% saying they lack high-speed internet at home and 28% saying it is because high-speed service isn't available in their areas. About three in 10 American Indians in the state (29%) say they do not have access to the internet via any means, high-speed or otherwise, at home.

CHART 6:

Percentage Among Arizonans Who Do Not Have High-Speed Internet at Home, and Those Who Say It Is Not Available in Their Area

- % Do not have high-speed internet at home
- % High-speed internet not available in their area



Across rural Arizona,
almost half (45%)
say they do not have
high-speed internet
and almost one-fourth
(23%) say it's because
high-speed service isn't
available in their area.



Arizona offers tremendous opportunity and quality of life for transplants and native-born residents. We need to incorporate all this wonderful diversity into sustainable plans for the future. There are large gaps in the digital, economic and tax resources available to our major metro areas and the rest of the state that need to be addressed.

JULIE ENGEL

*President/CEO, Chief
Economic Architect*

Greater Yuma Economic
Development Corporation

The Outlook of Arizonans on the Future

The 2020 Gallup Arizona Survey findings help us understand how Arizonans are feeling about the state — their pride in Arizona, their sense of connection to the state, their views on where it is headed and the issues they consider most important to the state's future. The data also enable us to take a closer look at the attitudes of younger Arizonans. Given the findings of CFA's recent survey of young Arizonans, this important demographic group agrees Arizona needs to do more to make the state a great place to live for talented young people.



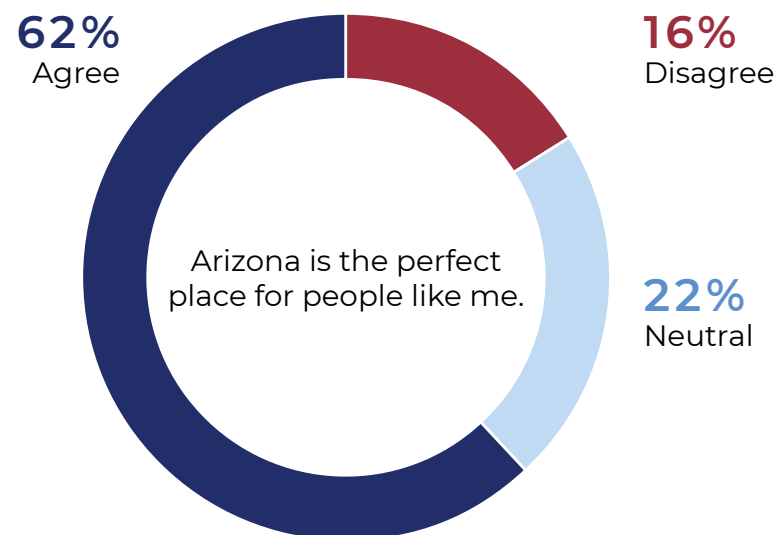
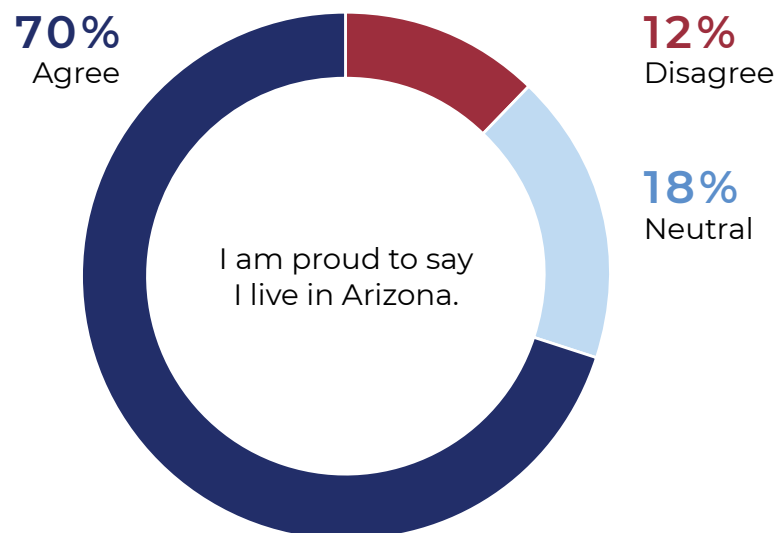
Most Arizonans Are Proud to Live in Arizona, but Many Are Uncertain About the State's Future

Seven in 10 (70%) Arizonans are proud to live in Arizona, while just 12% disagree with the statement. More than six in 10 (62%) agree that it is “the perfect place” for people like them, while 16% disagree.

The likelihood of Arizonans to agree with, “Arizona is the perfect place for people like me,” varies by demographic group and is less likely among younger people. About five in 10 Arizonans, age 18 to 34 (53%), agree with this statement, compared with seven in 10 (68%) among those age 55 and older. **Among college-educated millennials (Arizonans age 24 to 40 with at least a bachelor's degree), less than half (47%) agree that the state is the perfect place for them,** a concern for state leaders trying to retain Arizona's young talent.²⁵

CHART 7:

Please rate your level of agreement or disagreement with each of the following.

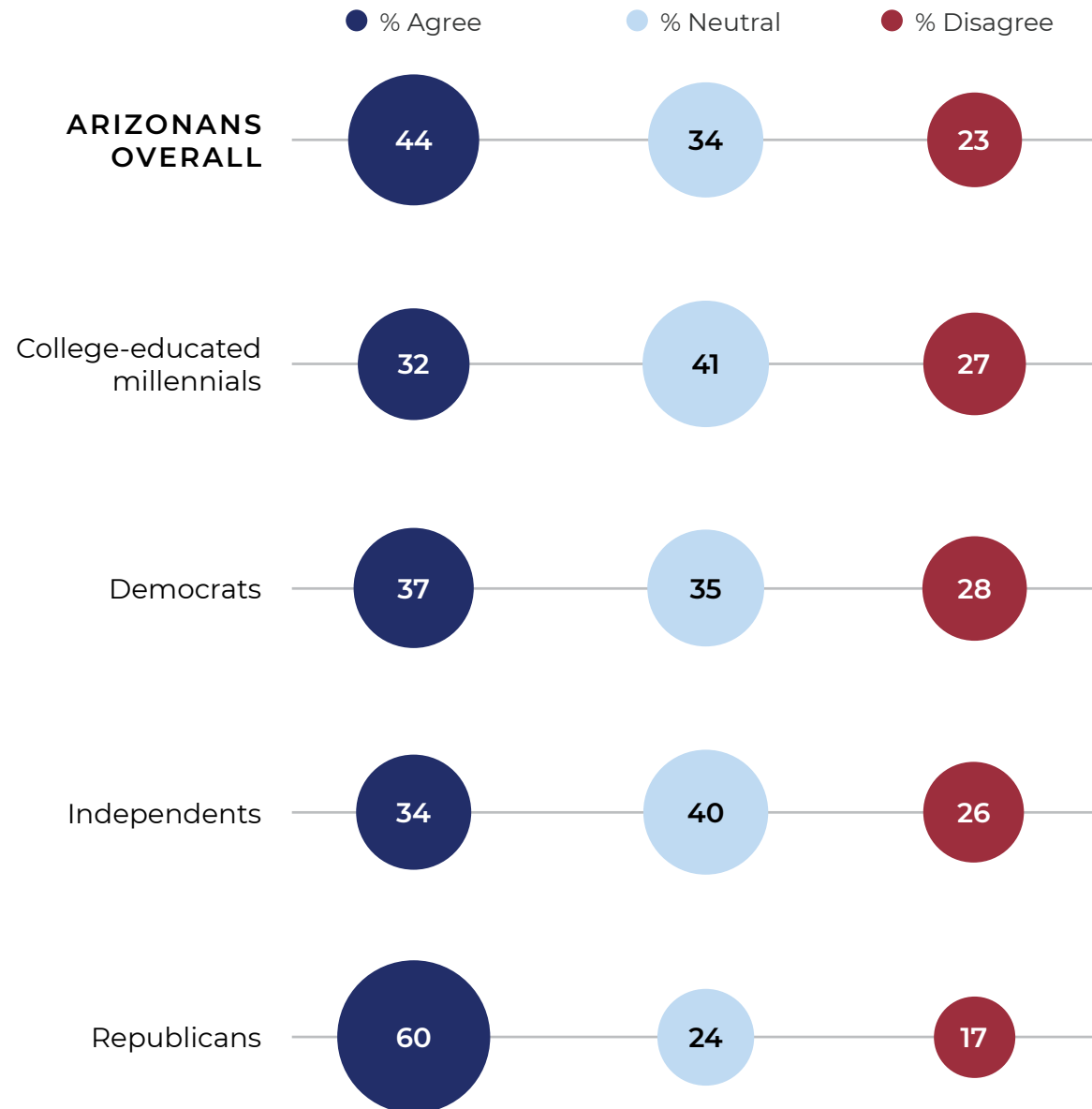


Certainty in Arizona's Current Direction Differs With Political Affiliation

Many Arizonans are unsure that the state is heading in the right direction. Overall, 44% of respondents agree the state is heading in the right direction, while 23% disagree and 34% give a neutral response. College-educated millennials are less likely than other respondents to be optimistic; they are almost as likely to *disagree* that Arizona is heading in the right direction (27%) as they are to agree (32%). Political affiliation also plays a role in these perceptions, with Republicans (60%) far more likely than Democrats (37%) or independents (34%) to agree that the state is heading in the right direction.

CHART 8:

Please rate your level of agreement or disagreement with the following: Overall, Arizona is heading in the right direction.

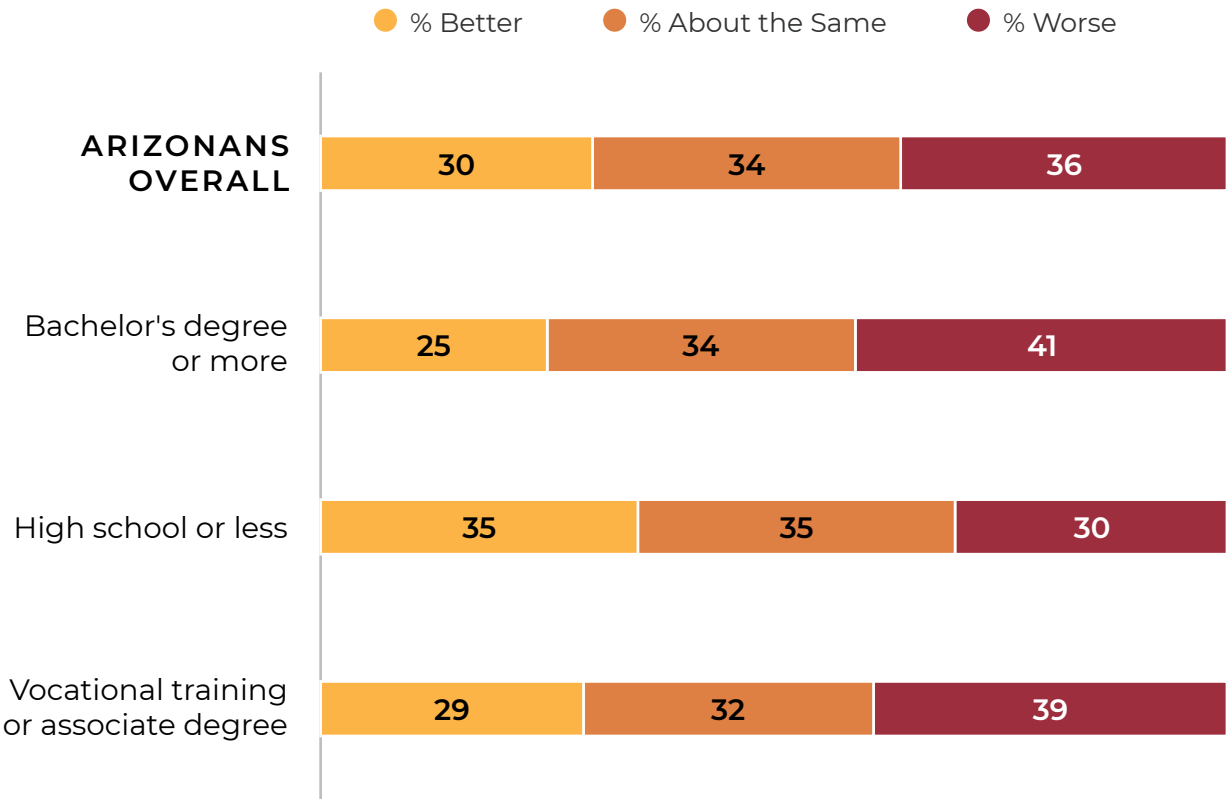


Arizonans Struggle to See a Better Future for the Next Generation

In a further sign of uncertainty about the state's future, Arizonans are somewhat more likely to say the standard of living for the next generation of Arizonans will be worse (36%) than to say it will be better (30%), with about a third (34%) saying the next generation's living standard will be the same as now. Here, differences by political affiliation are smaller; however, there are notable differences by education, with college-educated respondents least likely to be optimistic.

CHART 9:

Compared with now, do you think the standard of living for the next generation of Arizonans will be better, worse or about the same?





A bright future for Arizona depends on our ability to work together — really together. This requires incorporating diverse thoughts, experiences and perspectives into our plans to find better solutions to the problems we face. Leadership — at every level — must listen, learn and act on the very best ideas.

LISA URIAS

*Chief Program & Community
Engagement Officer*

Arizona Community Foundation

Younger Arizonans with Postsecondary Credentials Are Less Optimistic About the Future

Do Arizona's younger adults see a future in Arizona? Creating vibrant communities and nurturing a vibrant workforce will be key to making Arizona "the place to be" for Arizona's young people. However, younger Arizonan adults — particularly those with higher educational attainment — are less likely than Arizonans overall to be optimistic about life in the state.

Among Arizonans under 35 with any form of postsecondary credential:

45% Only 45% agree that Arizona is the perfect place for people like them, vs. 64% of all other respondents.

34% Just 34% agree that Arizona is headed in the right direction, vs. 45% of all other respondents.

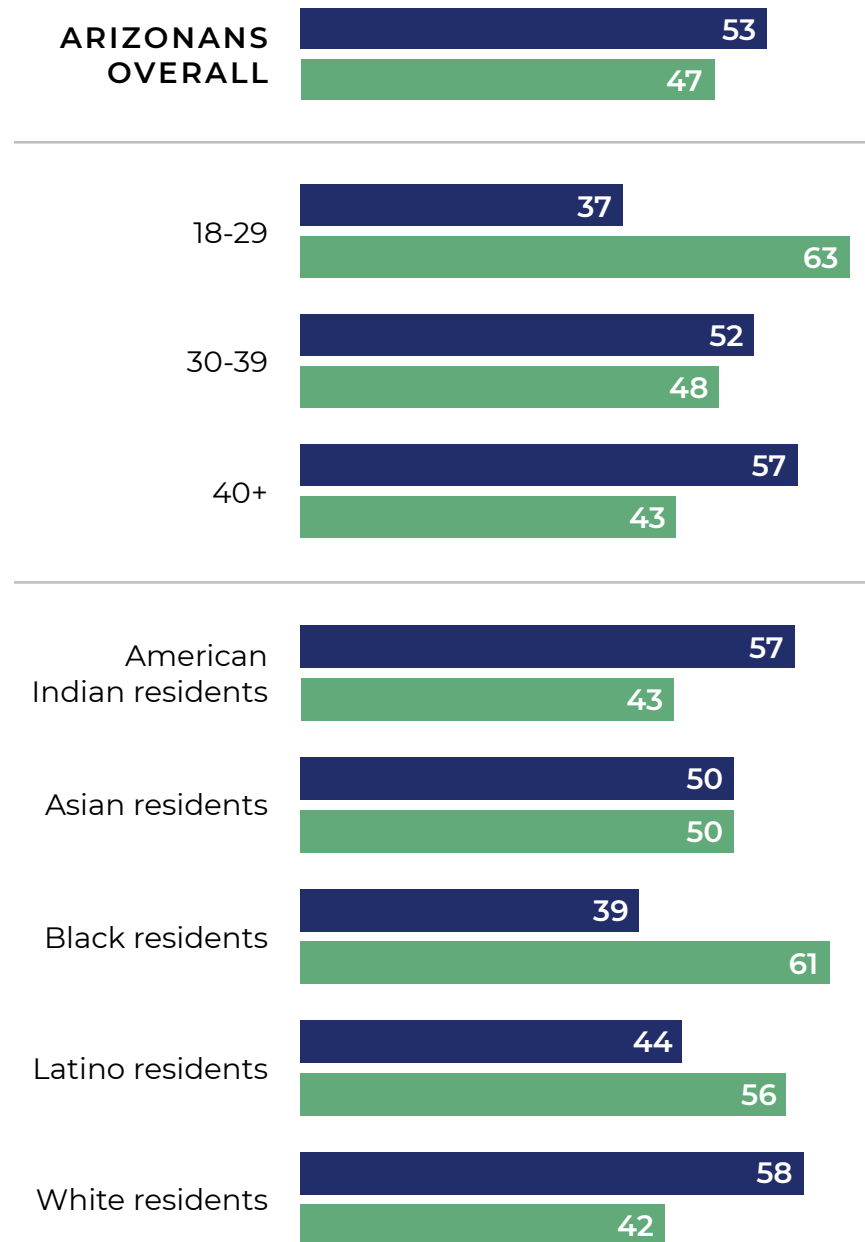
56% Only 56% agree they can get ahead in the state if they work hard, vs. 65% of all other respondents.

Young Arizonans across racial and ethnic groups are eager for opportunities to contribute their talents and grow. When asked whether stability or opportunity was more important to them and their families, Arizonans were evenly divided overall, with 53% favoring stability and 47% choosing opportunity. Among those under 30, however, almost two-thirds (63%) prioritize opportunity. Latino and Black Arizonans are also particularly likely to see opportunity as more important than stability to themselves and their families (56% and 61%, respectively).

An important consideration for leaders seeking to attract or retain younger Arizonans is the quality of K-12 education, given that many young adults have children, or may be planning to have children in the coming years. Only a slight majority of Arizonans overall (53%) agree that the state is a "great place to raise children," but this figure is even lower among those under 35 with postsecondary education, at 42%.

CHART 10:

For you and your family, what is more important?



Stability:

being able to support your family with a job and a safe place to live

Opportunity:

being able to improve the quality of life for you and your family through education and training, better job opportunities, and other resources

Latino and Black Arizonans are particularly likely to **see opportunity as more important than stability to themselves and their families** at 56% and 61%, respectively.



Data can get a bad rap as boring or cold, but data is knowledge and knowledge is power. The data in this report ground us in the lived experiences and perspectives of Arizonans and provide a foundation for productive conversations and action on critically important issues, like education, jobs, environmental sustainability, and social and racial justice.

MI-AI PARRISH

*Managing Director & Professor
of Practice*

ASU Media Enterprise, ASU

ARIZONANS RANK THE TOP ISSUES MOST IMPORTANT TO ARIZONA'S FUTURE

The 2020 Gallup Arizona Survey asked Arizonans to select the top three issues they consider to be most important for improving Arizona's future. The issues that rose to the top were:

- 1 affordable healthcare for all Arizonans
- 2 quality K-12 public education
- 3 more good-paying jobs
- 4 a secure water supply for Arizona
- 5 ending systemic racism
- 6 affordable housing

Our Shared Public Values

In the groundbreaking 2009 Gallup Arizona Survey, the Center for the Future of Arizona first learned, much as we did in the most recent survey, that as Arizonans, we agree on much more than we disagree. These insights provide the foundation for *The Arizona We Want* — a shared vision of success based on what matters most to Arizonans and that expresses their highest aspirations and hopes for the future. The 2020 Gallup Arizona Survey revisited issues, like education and healthcare, which were addressed in the 2009 survey, and updated questions to reflect issues of the day and focus on priorities for the future.

The 2020 Gallup Arizona Survey also asked about critically important areas that were not addressed in the 2009 survey, including immigration, equity and social justice, and environmental sustainability. In addition, we wanted to know about the lived experiences of Arizonans and their thoughts on needed change. This allowed us to identify actions that can help close gaps and support our shared public values. To learn more about how we identified shared public values in the 2020 data, see the Methods section of this report (Page 79).



At a time when our nation appears to be dramatically divided, it was uplifting to learn that over 70% of all Arizonans agree on the most critical issues facing our state. This remarkable statistic means that, by working together, a brighter future is within reach for Arizona.

RONALD SHOOPMAN

Southern Arizona Leadership Council (Retired)

Our Shared Public Values

1 EDUCATION

a highly educated and skilled population

2 HEALTH AND WELLBEING

affordable healthcare that covers preexisting conditions and provides accessible mental health services

3 JOBS AND ECONOMIC OPPORTUNITY

good-paying jobs and the education and training needed for all Arizonans to fully participate in a vibrant economy

4 ENVIRONMENT AND SUSTAINABLE FUTURE

sustainable practices that protect our air, land and water, and support a high quality of life for all

5 CIVIC ENGAGEMENT AND LEADERSHIP

civic engagement that solves problems and democracy that works for all

6 FAIR, JUST AND EQUITABLE SYSTEMS

fair, just and equal treatment of all people

7 IMMIGRATION REFORM

comprehensive immigration reform, including a pathway to citizenship and support for “DREAMers”

Education

SHARED PUBLIC VALUE:

A highly educated and skilled population is good for Arizona.

The vast majority of Arizonans — 84% — believe that a highly educated and skilled population is good for the state's economy and that every child in Arizona deserves an excellent education, regardless of family or personal circumstance (89%).

Arizonans overwhelmingly support a number of actions needed to support quality education, ranging from making sure schools have great teachers and principals to giving schools the flexibility to tailor learning to each child, a concept that has gained traction during the pandemic when school facilities were closed and learning was disrupted. There is striking statewide consensus on these actions with very little variation between rural, urban and mid-sized communities.

WHERE ARIZONANS AGREE ACTION IS NEEDED

% Important/Agree

92%

Ensure all Arizona public schools have highly qualified teachers and principals.

76%

Make civics education a priority in K-12 education.

76%

Structure the school day and school year to better match the needs of working parents.

75%

Reduce the financial barriers of attending college.

75%

Give Arizona schools the flexibility to tailor learning to each child.

73%

Spend more money on K-12 public education.

82%

Increase the number of Arizona high school graduates who enroll in universities, community colleges or technical/trade schools.

79%

Close gaps in educational outcomes for vulnerable populations (e.g., low-income students, students with disabilities, English language learners).

79%

Provide affordable, accessible and reliable internet and technology to all students.



As a district leader, I have firsthand knowledge of what quality early childhood education can provide, especially for our students who speak Spanish as their first language. Academic growth begins with a solid foundation in early childhood.

DAVID Y. VERDUGO

Superintendent
Santa Cruz Valley Unified
School District No. 35

Southeastern Arizonans Strongly Support Education Action

People who live in Southeastern Arizona, which includes Graham, Greenlee, Cochise and Santa Cruz counties, and has the highest proportion of Arizonans with low income in the state, also had the highest rating of the following four education action items, compared with other regions in the state:

% Important

- 89%** Reduce the financial barriers of going to college.
- 78%** Make public schools places where kids and families can get support services.
- 76%** Make quality preschool programs available for families that want them.
- 75%** Ensure all high school students graduate college and are career-ready.

Parents Want Schools to Have the Flexibility to Tailor Learning to Each Child

For most of the education actions, responses among parents of children 18 and under are similar to those among Arizonans overall. However, those with children are more likely to prioritize one change in particular: 84% say it is important to give schools the flexibility they need to tailor learning to each child.

Support for Preschool Is Especially High Among Some Arizonans

Arizonans with a household income of less than \$36,000 a year were especially likely to support making quality preschool programs available for families that want it, with 72% deeming it important. Millennials expressed similarly strong support for this same action, with 73% deeming it important.

Arizonans Prioritize the Need for Strong K-12 Schools and Continue to Have Significant Concerns About Their Quality

Arizonans want quality education that supports the success of every child. But **only about one in four Arizonans (26%) agree that the state's K-12 public education is high-quality.** This is similar to findings in the 2009 Gallup Arizona Survey, in which Arizonans identified education as a top priority for Arizona's future, yet only 20% of Arizonans at the time rated the overall quality of their local public school as "very good."

Three in four Arizonans (73%) agree that the state should spend more money on K-12 public education, including the majority of Democrats (88%), Republicans (56%) and independents (74%). Arizonans prioritize putting quality teachers and principals in the schools, with 92% saying it is important.

Only one in four Arizonans (26%) agree that the state's K-12 public education is high-quality.



Arizonans overwhelmingly agree that every student deserves an excellent education regardless of background or ZIP code. And yet, only one in four Arizonans thinks we have a high-quality K-12 education system. We need to fix the gap between hope and reality so Arizonans get the education system they want and deserve.

PAUL LUNA

President & CEO

Helios Education Foundation

CHART 11:

Please rate your level of agreement or disagreement with each of the following.

% Agree

89%

Every student in Arizona deserves an excellent education, regardless of family income, race, ethnicity, disability, language spoken or ZIP code.

84%

A highly educated and skilled population is good for Arizona's economy.

73%

Arizona should spend more money on K-12 public education.

60%

The state should provide funding for more children to attend preschool.

26%

Arizona's K-12 public education is high-quality.

84% of Arizonans agree that a highly educated and skilled population is good for Arizona's economy.

Unequal Educational Outcomes for Arizona's Children

Arizonans' concerns about the quality of K-12 education reflect significant disparities in outcomes for students statewide.

The Arizona Education Progress Meter, first launched by the Center for the Future of Arizona and Expect More Arizona in 2016, provides trusted data on where we stand in education — from access to quality early learning to postsecondary attainment — and includes widely embraced 2030 goals. Arizona schools have made some progress in terms of raising students' test scores; according to the National Assessment of Educational Progress (NAEP), Arizonan fourth and eighth graders have made among some of the largest gains in scores for math and reading in recent years.²⁶

Despite these modest gains in some areas, **Arizona is not on track to reach the 2030 goals identified in the Arizona Education Progress Meter** and there are major differences in educational outcomes for students by ethnicity, race and socioeconomic background.

The data on educational outcomes provides a clear call to action for Arizonans, especially when juxtaposed with the 2020 Gallup Arizona Survey findings that Arizonans strongly believe every child deserves an excellent education, regardless of family or personal circumstance (89%) and want to see gaps in educational outcomes closed (79% important).



We all want an Arizona that is thriving, where every member of our community reaches their full potential. To achieve this vision, we need to begin to address the impact of poverty in our communities on the educational attainment of our students.

STEPHANIE PARRA

Executive Director

ALL In Education

TABLE 2:

Arizona Education Progress Meter Indicators, by Subgroup²⁷

	Quality Early Learning	3rd Grade Reading	8th Grade Math	High School Graduation	Opportunity Youth	Post-High School Enrollment	Postsecondary Attainment
ALL ARIZONA STUDENTS	19%	46%	41%	79%	12%	53%	46%
American Indian students	*	22%	18%	69%	32%	38%	*
Black students	*	35%	25%	76%	13%	51%	*
Latino students	*	36%	30%	76%	14%	47%	28%
White students	*	61%	55%	84%	9%	59%	55%
Economically disadvantaged	*	34%	28%	74%	*	*	*
English language learners	*	6%	5%	54%	*	*	*
Students with disabilities	*	18%	12%	68%	26%	*	*
2030 GOAL	45%	72%	69%	90%	7%	70%	60%

*Data not presented in the table is unavailable for the following reasons: it may not be available at the state level, there are too few students in the sample to ensure student privacy, or survey-derived data does not meet our accuracy standards.

Arizona is **not on track to reach the 2030 goals** identified in the Arizona Education Progress Meter and there are major differences in educational outcomes for students by ethnicity, race and socioeconomic background.

79% of Arizonans believe it is important to **close gaps in educational outcomes** for vulnerable populations.



We need to be open to doing things differently to create equity and opportunity for all students. Giving schools the flexibility they need to tailor learning is a powerful example — one that Arizona parents clearly support.

CHRISTINE BURTON

Co-Founder & Chair

Burton Family Foundation

Less Than Half of Working-Age Arizonans Have Postsecondary Education

According to the Arizona Board of Regents' Postsecondary Attainment Report for 2020,²⁸ 53% of the state's high school graduates enrolled in postsecondary education in 2018, with 29% enrolling in four-year degree programs — a rate insufficient to replace the number of postsecondary credential holders who will retire in the coming years. Arizona has pursued a series of initiatives to increase postsecondary attainment rates, including Achieve60AZ, which set a goal of 60% postsecondary attainment for Arizona adults, age 25 to 64, by 2030.²⁹

Aside from the relatively low proportion of students attending four-year colleges, the number pursuing vocational training is also insufficient to support Arizona's growing economy. For example, in 2018, 82% of Arizona's general contractors reported difficulty filling hourly positions, and 70% rated the local pipeline for producing skilled workers as "poor."³⁰ According to College Success Arizona, increasing college attainment to 60% would add \$3.5 billion in personal income and tax revenue to the state economy.³¹

Education and Pathways to Opportunity for Latino Arizonans

As the fastest-growing population in Arizona³², Latinos will have a major impact on the state's future. According to census data from 2020, Latino Arizonans make up 32% of the population. Among Arizonans age 18 to 30, they make up 42% of the population. Latino students make up the largest racial/ethnic demographic group in the state's K-12 public schools with just over 504,000 students.³³ As data in the Arizona Education Progress Meter show, however, Latino students are behind in academic achievement across the K-12 education system and are underrepresented in postsecondary degree achievement.

Latino parents are looking for ways to support the success of their children. Preschool education is particularly important to Latino Arizonans:

- 71%** agree the state should provide funding for more children to attend preschool, compared with 57% of other Arizonans.
- 76%** say it is important for Arizona to make quality preschool programs available for families who want them, compared with 61% of other Arizonans.

Latino Arizonans are also particularly likely to prioritize two goals related to postsecondary education:

- 89%** of Latinos believe it is important to increase the number of Arizona high school graduates enrolling in universities, community colleges or technical/trade schools.
- 87%** of Latino residents believe it is important to reduce the financial barriers of going to college.

Health and Wellbeing

SHARED PUBLIC VALUE:

Arizonans want affordable healthcare that covers preexisting conditions and provides accessible mental health services.

Affordable, quality healthcare for all Arizonans was ranked among the highest priorities in the first 2009 Gallup Arizona Survey and remains a high priority for Arizonans today, deemed important by 83% of Arizonans overall. Guaranteeing affordable, quality healthcare and insurance for Arizonans with preexisting conditions is among the highest-ranked priorities in the entire survey, with 87% saying it is important. Access to affordable mental health services also ranked very high at 85%.

WHERE ARIZONANS AGREE ACTION IS NEEDED

% Important

87% Guarantee affordable healthcare and insurance for Arizonans with preexisting health conditions.

85% Make mental health services available and affordable for all Arizonans who need them.

83% Ensure any Arizonan can get quality healthcare without risk of financial harm.

81% Expand public reporting on quality of hospital and healthcare facilities.

80% Improve state-level management of public health emergencies.

78% Expand programs to reduce substance abuse.

75% Guarantee coverage of telemedicine services by health insurance providers.

73% Increase access to wellness programs and alternative medicine.

70% Expand Arizona's Medicaid (AHCCCS) program to include more lower-income Arizonans.



As a fourth-generation Arizonan, my family has been involved in trying to make Arizona a better place. I've learned [...] that issues, such as health, education, housing and income equality are deeply interconnected, and if we are to truly promote healthy communities [...] we must work on these issues together.

SUZANNE PFISTER

President & CEO

Vitalyst Health Foundation

Across geographic areas, the consensus is high for all healthcare items. Particularly strong support for action in various regions include:

75%

of Pima County residents support expanding Arizona's Medicaid (AHCCCS) program to include more lower-income residents.

92%

of Central Arizona residents support guaranteeing affordable healthcare and insurance for Arizonans with preexisting health conditions.

87%

of Southeast Arizona residents support expanding programs to reduce substance abuse.

88%

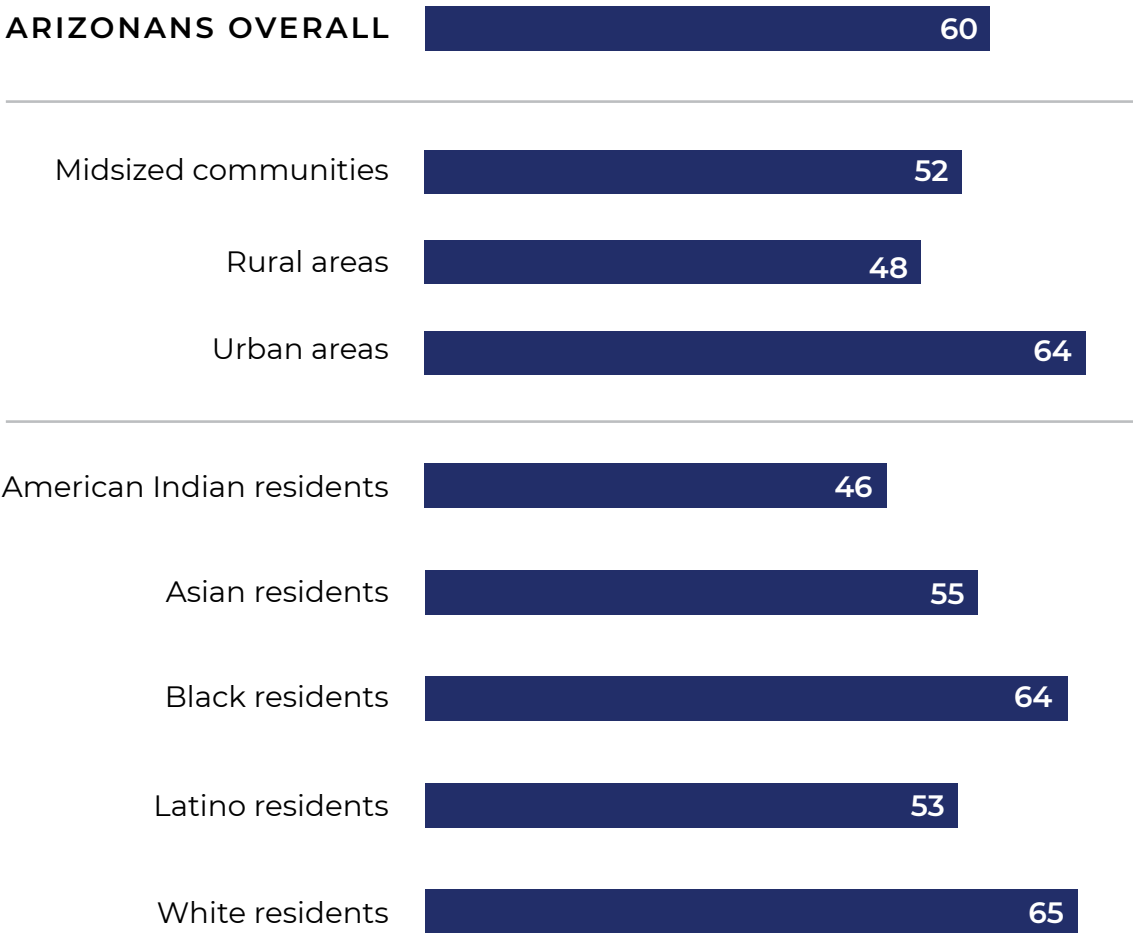
of Western Arizona residents support increasing access to wellness programs and alternative medicine, as well as expanding public reporting on the quality of hospital and healthcare facilities and improving state-level management of public health emergencies.

Six in 10 Arizonans Are Satisfied With Healthcare Quality Overall, With Satisfaction Lowest in Rural Areas

Sixty percent of Arizonans say they are satisfied with the quality of healthcare they receive. This leaves more than 2 million Arizonans dissatisfied with their healthcare. Results vary significantly by racial/ethnic group and urban vs. rural areas. Among American Indian Arizonans and in the state’s rural communities, satisfaction with healthcare services falls below 50%.

CHART 12:
How satisfied or dissatisfied are you with the quality of healthcare you receive?

% Satisfied, by urbanicity and racial/ethnic group





While some groups will weather the pandemic's storm, those living in poverty or who have language barriers and poor, untreated health conditions will continue to suffer in this and in the next worldwide event. An approach of public-health equity is necessary.

CARMEN HEREDIA

CEO

Valle Del Sol

60% of Arizonans say they are satisfied with the quality of healthcare they receive.

This leaves more than 2 million Arizonans dissatisfied with their healthcare.



Satisfaction Is Low Across Several Parts of Healthcare

Several aspects of the state's healthcare system garner lower satisfaction among Arizonans overall. In particular, less than half are satisfied with their wait time to see a provider (40%) or the cost of prescription medicine (38%). Satisfaction with wait time to see a provider is considerably lower among rural Arizonans than those in urban areas — 28% vs. 42%, respectively. And while a slight majority of Arizonans overall (52%) are satisfied with the availability of specialists in their area, a significant gap in perspective exists between urban (52%) and rural (30%) respondents who report being satisfied.

Additionally, just 35% of Arizonans overall are satisfied with the availability of mental health providers, but those in the western part of the state — including Mohave, La Paz and Yuma counties — had very low levels of satisfaction with their access to mental health providers, at only 17%.

CHART 13:

How satisfied or dissatisfied are you with each of the following?

% Satisfied among Arizonans overall

55%

My healthcare coverage/insurance

52%

Availability of healthcare specialists in my community

40%

Wait time to see a healthcare provider

38%

My healthcare costs

38%

The cost of prescription medicine

35%

Availability of mental health providers in my community

Only 17% of those in the Western part of the state are satisfied with the availability of mental healthcare providers.



What should be an integral and necessary part of a full medical facility — the availability of specialists — is missing in most rural areas. Larger medical centers should partner with rural communities to expand access to specialists.

BUNA GEORGE

Executive Director
Greater Yuma Port Authority
and Former Cancer Patient

Agreement that Arizonans should be able to get quality healthcare without risking financial harm is highest among lower-income Arizonans, but it is common across all income groups. Eighty-eight percent of respondents with household incomes under \$60,000 say access to affordable, quality healthcare is important, with 77% of those with incomes of \$120,000 or more saying the same. However, only 38% of Arizonans are satisfied with their costs for healthcare. This means that almost two-thirds of Arizonans (62%), nearly 3.5 million people, are feeling adversely impacted by the cost of healthcare.

Most people living in urban areas (61%) are satisfied with the quality of healthcare they receive, compared with less than half (47%) of rural residents. As noted above, rural Arizonans are less likely than those living in cities to be satisfied with their wait times to see healthcare providers, likely due in part to the higher ratio of population to providers in rural areas. In Arizona's urban areas, the ratio of population to primary care physicians is 2,407 to one, according to the state's public health department, which is considered insufficient under U.S government guidelines. However, outside Arizona's cities, the ratio is substantially worse at 3,896 to one in rural and American Indian communities.³⁴

Arizonans Are Concerned About the Health and Safety of Their Communities

The 2020 Gallup Arizona Survey asked several questions, gauging the extent to which Arizonans feel their community promotes a safe and healthy lifestyle. Almost two-thirds overall agree that they live in a community that is healthy (65%) and safe (64%).

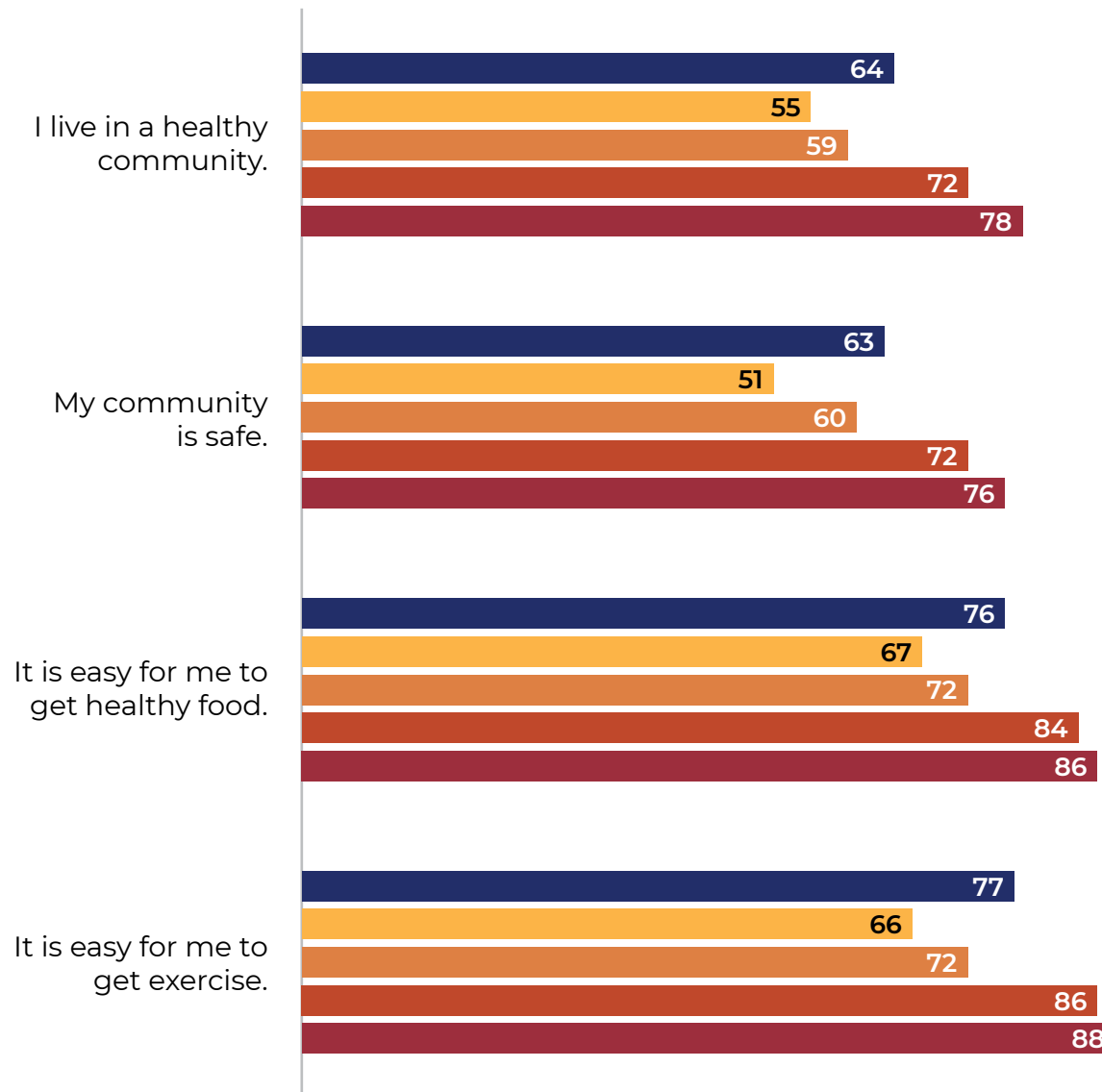
However, this leaves nearly 2 million Arizonans living in communities they characterize as not healthy. Additionally, Latino Arizonans (54%) are less likely than non-Latinos (68%) to agree that they live in safe communities. These responses vary substantially by income level, with just over 50% of those with household incomes under \$36,000 agreeing their community is healthy and safe, compared with more than 75% of those with incomes above \$120,000.

CHART 14:

Please indicate your level of agreement with each of the following.

% Agree, by household income

● % Arizonans Overall ● % Less than \$36,000 ● % \$36,000-<\$60,000
 ● % \$60,000-<\$120,000 ● % \$120,000 or more



Views of Arizonans on the Health of Their Communities

Arizonans were also asked if it was easy for them to get healthy food and exercise, which are both essential to good health. Here, overall agreement levels were somewhat higher at just over 75% for each question, but differences by income groups exist. There are 33% of Arizonans making less than \$36,000 per year — or 615,000 low-income residents — who say it is not easy to get healthy food.

Arizonans' views on living in healthy communities also varies by region of the state, and whether they live in an urban, rural or mid-sized community. Urban respondents (66%) were much more likely to say they live in a healthy community, compared with rural Arizonans (42%). Urban respondents also report finding it much easier to get healthy food (78%), compared with rural residents (48%).

Jobs and Economic Opportunity

WHERE ARIZONANS AGREE ACTION IS NEEDED

- 1 Create more opportunities to build careers in Arizona, especially for young people.
- 2 Improve economic stability for lower-wage workers through improved work benefits, greater education and training, and opportunities to advance.
- 3 Improve pay equality and opportunities for promotion.
- 4 Provide more affordable, high-quality options for childcare.
- 5 Ensure equitable and inclusive economic recovery.

SHARED PUBLIC VALUE:

Arizonans want more good-paying jobs and the education and training needed to fully participate in a vibrant economy.

Arizonans want to get into better-paying jobs and recognize that education and training provide the greatest opportunity to grow careers. When we look at the data on job satisfaction, opportunities for advancement and quality of life issues, including the ability to pay for necessities like food, housing and healthcare, we see that outcomes are clearly correlated with educational attainment. Employees with any form of postsecondary credential — including technical certificates and associate degrees — are also less likely to report a loss of hours or income as a result of COVID-19.



Connecting talent into pathways to opportunity and to "more good-paying jobs" are keys for both our short-term and long-term economic prosperity [...] and will ultimately have the impact of reducing poverty and creating a skilled workforce.

AMBER SMITH

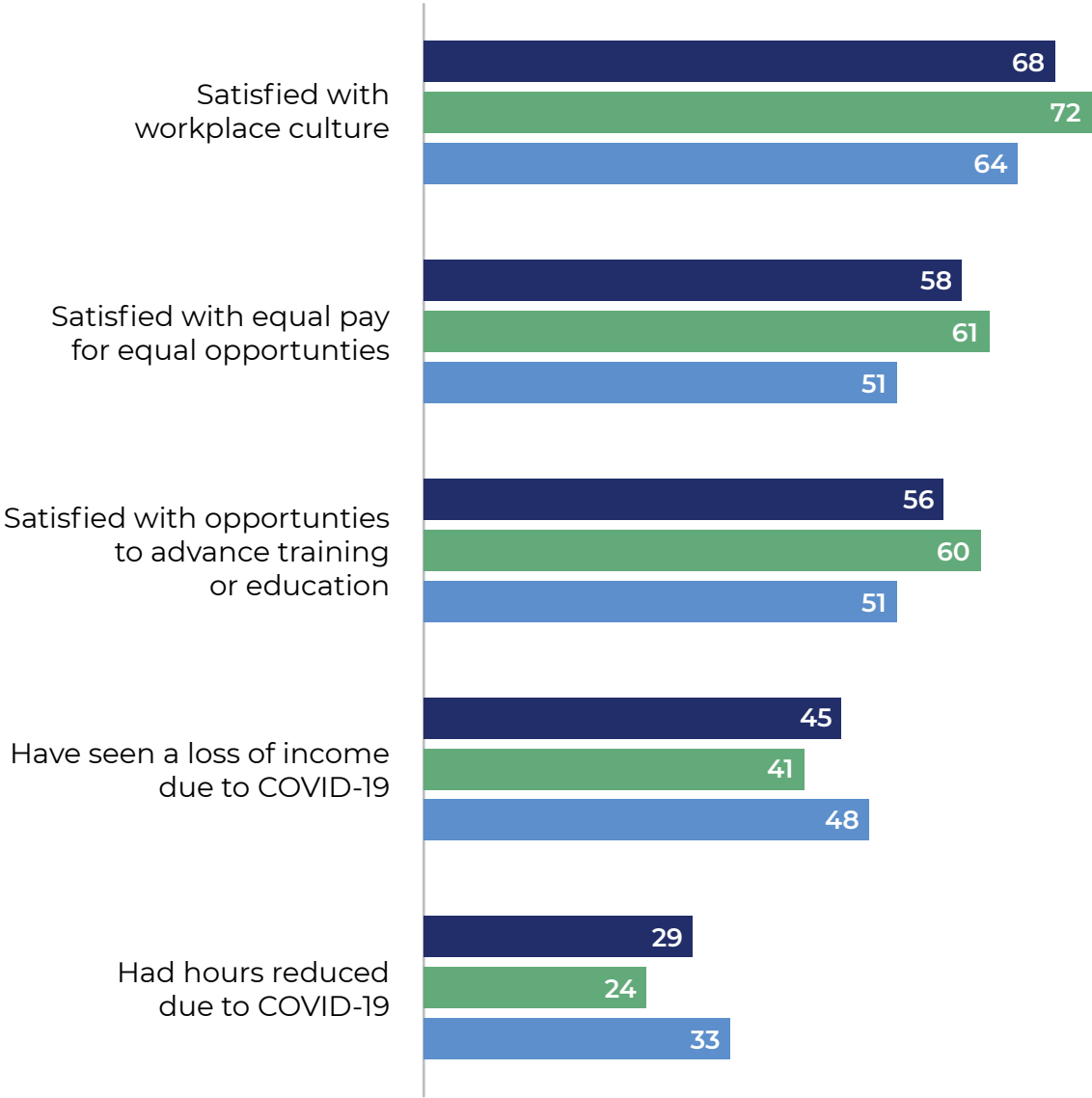
President & CEO
Tucson Metro Chamber

CHART 15:

Differences in Job Perceptions and Experiences Between Employed Arizonans, by Education

% Agree, by household income

- % Arizonans Overall
- % Employees with postsecondary credential
- % Employees without postsecondary credential



Job Satisfaction With Workplace Culture Is High Overall, but There Are Significant Gaps in Key Areas Among Lower Income Workers

The 2020 Gallup Arizona Survey reveals that, among employed Arizonans, many are satisfied with a number of aspects of their jobs. Arizonans ranked workplace culture and diversity and inclusion high overall. However, satisfaction falls to 50% or below among lower-income workers in several key areas, including work benefits, opportunities to advance their careers, education or training, equal pay and opportunities for promotion.

Arizonans Want Education, Training and Opportunities to Grow Their Careers

Satisfaction with a few job characteristics is somewhat higher in many areas in rural Arizona than it is in urban or midsized communities. In particular, rural residents are more likely to say they are satisfied with their work-leave policies, the mission and impact of their work, and their opportunities to advance their career and training in the state.

TABLE 3:
Thinking about your primary job, how satisfied or dissatisfied are you with each of the following?
% Satisfied, among employed Arizonans

	ALL EMPLOYEES	Income under \$60,000	Income \$60,000 or more
Diverse and inclusive environment	73%	70%	75%
Workplace culture	69%	65%	72%
Mission and impact of my work	67%	55%	75%
Work leave policies	61%	52%	68%
Opportunities to grow my career in Arizona	59%	47%	67%
Equal pay and equal opportunities for promotion	59%	50%	64%
Opportunities to advance my education or training in Arizona	56%	46%	62%
Work benefits (e.g., health insurance, retirement)	53%	40%	62%

Arizonans ranked "**more good-paying jobs**" as one of the issues most important to the future.

Opportunities for career advancement and quality of life issues, including the ability to pay for necessities like food, housing and healthcare, are clearly linked with educational attainment.



Arizona can take advantage of the wealth of diversity in our state — [a diversity of] people and thinking — to create a robust marketplace of ideas and solutions. Diversity is a core business principle that gives Arizona a competitive advantage in the global arena.

MONICA VILLALOBOS

President & CEO

Arizona Hispanic Chamber
of Commerce

Job Losses Are Lower for Arizonans With Higher Levels of Educational Attainment

Arizona saw strong job growth in the years prior to the COVID-19 pandemic, particularly in the Phoenix area. Maricopa County was ranked first out of 601 counties nationwide in the ability to attract and retain high-quality workers.³⁵ Arizona appears poised, overall, to successfully rebound from the economic impact of the pandemic, especially given the transition underway from a growth model of the economy to one based on innovation.³⁶ However, many low-income communities, rural communities and communities of color suffered disproportionately under the pandemic.

Among racial/ethnic groups, Latino and Black Arizonans are most likely to have lacked enough money to pay for healthcare, while American Indians are most likely to say there were times when they didn't have enough money to pay for food and housing. Racial and ethnic differences, in part, reflect gaps in educational attainment. Arizonans with less than a high school education are more than twice as likely as the average of those with a high school education or more to say they have had trouble paying for food (38% vs. 17%, respectively) and shelter (33% vs. 15%, respectively).

Many low-income communities, rural communities and communities of color suffered disproportionately under the pandemic.

32%

of Latino Arizonans were furloughed, compared with 19% of non-Latinos.

35%

of Latino Arizonans had hours reduced, compared with 26% of non-Latinos; 51% of Latinos saw a loss of income, compared with 42% of non-Latinos.

32%

of American Indian Arizonans were let go due to COVID-19 and more than 40% of Black and American Indian Arizonans had their hours reduced because of COVID-19.

TABLE 4:

Have there been times in the past 12 months when you did not have enough money to ____?

% Yes

	Did not have enough money to pay for healthcare for you or your family	Did not have enough money to buy food for you and your family	Did not have enough money to pay for housing for you or your family
ARIZONANS OVERALL	25%	19%	18%
American Indian Arizonans	29%	45%	41%
Asian Arizonans	20%	11%	16%
Black Arizonans	35%	22%	34%
Latino Arizonans	35%	25%	22%
White Arizonans	20%	15%	13%
High school graduate or more	24%	17%	15%
Less than high school	32%	38%	33%



Arizona has been a magnet for young talent who are attracted to the lower cost of living and growing high-tech industry here. Yet, Arizona's young people have concerns about the rising cost of housing, the quality of K-12 education and the accessibility of college. This leaves our future dependent on a workforce that is increasingly disaffected.

LARRY EDWARD PENLEY

Chair

Arizona Board of Regents

Childcare Is a Barrier Preventing Many Arizonans From Going Back to Work or School

The need for childcare is one of the many barriers to economic opportunity that has been heightened during the COVID-19 crisis, since many children who would otherwise be in school need supervision as they learn from home. A recent report from the Bipartisan Policy Center indicates that, even prior to the pandemic, there were only enough childcare slots to meet about 75% of the potential need statewide.³⁷

The 2020 Gallup Arizona Survey finds that 27% of Arizonans with children 18 or under say the cost of childcare is preventing them from going back to work or school, while 22% say the same about the limited availability of childcare. These figures are higher among low-income respondents and particularly Black Arizonans, more than half of whom (54%) say the cost of childcare is keeping them from going back to work or school. These represent substantial numbers of Arizonans who could be advancing their lives and contributing to the economy, were it not for the barriers they are facing in getting back into the workforce.



As we look to the possibilities in Flagstaff in this decade and beyond, especially as the community and economy gradually recover from the coronavirus pandemic, there are two drivers that can help shape the path forward: economic opportunities and an educated workforce.

ERIC ZACHARIAS

Leader of the Medical Products Division

W. L. Gore & Associates

TABLE 5:

Please indicate your level of agreement with each of the following: The cost of childcare is preventing me from going back to work or school. The limited availability of childcare is preventing me from going back to work or school.

% Agree, among Arizonans with children 18 or under

	Cost of childcare	Limited availability of childcare
ARIZONANS OVERALL with children 18 and under	27%	22%
Income \$60,000+	18%	22%
Income under \$60,000	36%	35%
American Indian parents	21%	25%
Asian parents	33%	33%
Black parents	54%	48%
Latino parents	29%	26%
White parents	23%	16%

Environment and Sustainable Future

SHARED PUBLIC VALUE:

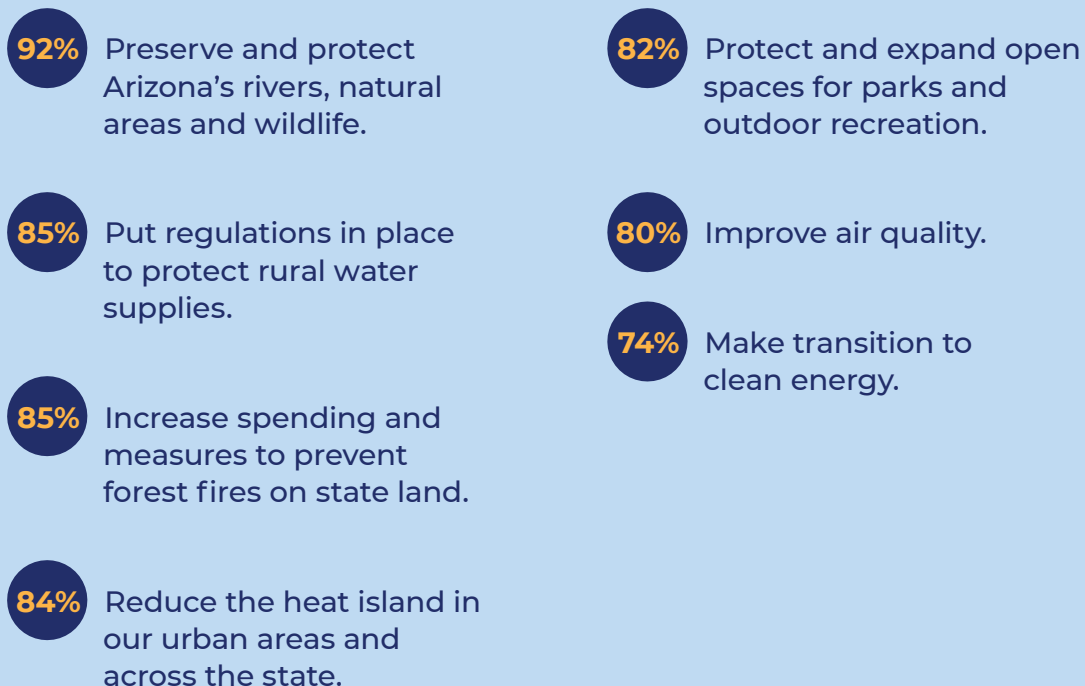
Arizonans want sustainable practices that protect our air, land and water, and support quality of life for all.

Arizonans have an overwhelming appreciation of the state's natural beauty and want to protect Arizona's rivers, natural areas and wildlife, and mitigate the impact of rising heat in communities across the state. Ninety-two percent say it is important for the state to "preserve and protect its rivers, natural areas and wildlife," one of the two highest-consensus items from the survey.

Nine in 10 Arizonans (91%) rate the state's natural beauty as "excellent" or "good," and 83% rate its outdoor parks, playgrounds and trails highly. Other items related to recreation and community-building — including sports, public events, and arts and culture — are also rated highly by respondents.

WHERE ARIZONANS AGREE ACTION IS NEEDED

% Important



92% say it is important for the state to “preserve and protect its rivers, natural areas and wildlife,” one of the two highest-consensus items from the survey.



As a person who lives in a rural community and works regularly with agricultural producers, I can attest that water certainty is a resource concern of the highest priority. Rural Arizona depends on water being in rivers and streams to maintain the economic benefits and quality of life that we know today.

CHIP NORTON

Chairman

Verde Natural Resource
Conservation District



When our political system fails to represent all voices, those excluded from it are often the same communities of color and young people [who are] most impacted by climate change and climate injustices. A just democratic system is a reflective one — one where the voices of all people are valued and heard.

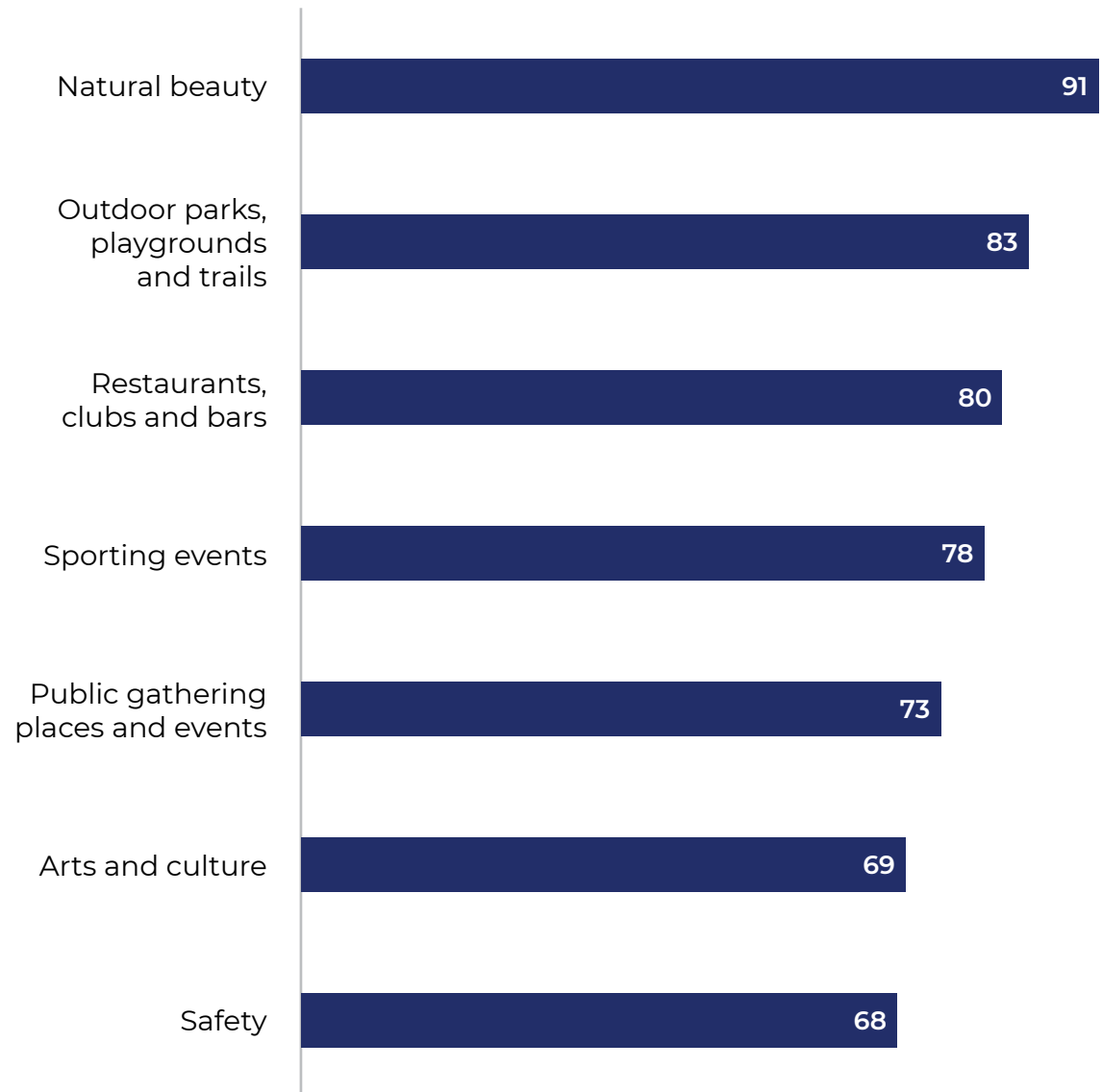
VANIA GUEVARA

Public Lands Fellow
Chispa Arizona

CHART 16:

Typically, how would you rate the following in Arizona — excellent, good, fair or poor?

% “Excellent” or “Good”



83% of Arizonans rate
the state's outdoor parks,
playgrounds and trails as
"excellent" or "good".



To maintain a sense of balance in our modern society, it's important to understand that we don't just reside in ZIP code areas, but that we have a deeply rooted relationship with the land and everyone and everything around us.

JACOB MOORE

*Associate Vice President of
Tribal Relations*

Arizona State University
(Tohono O'odham, Akimel
O'odham, Lakota, Dakota)



Forest restoration is a win-win proposition for all of Arizona. The thinning of small-diameter trees from our forests benefits water supplies, wildlife habitats and recreation opportunities, while also creating much-needed jobs that help rural communities.

SUE SITKO

Forest Ecologist
The Nature Conservancy
Former Co-Chair
Four Forests Restoration
Initiative Stakeholder Group

Arizonans Support Measures to Address Climate Change

Arizona faces a number of specific environmental pressures related to climate change and the state's rapid population growth. Arizonans broadly support a number of goals in response to such challenges. They support actions to protect rural water supplies, prevent forest fires, reduce heat islands in our urban and rural areas, and transition to clean energy.

A CLOSER LOOK AT WHERE SUPPORT IS STRONGEST:

- 1 Protecting rural water supplies:** Arizonans in mostly urban areas are about as likely as those in mostly rural areas to rate this action important — 86% vs. 88%.
- 2 Preventing forest fires:** American Indian Arizonans are particularly likely to say increased efforts to prevent forest fires are very important, at 72%.

- 3 Reducing heat islands:** Reducing the “urban” heat island was ranked nearly as highly by Arizonans in rural areas as by respondents in urban areas, a testament to the pervasive problem of rising temperatures across the state. Latino Arizonans are particularly likely to say such efforts are “very important,” at 75%.
- 4 Protecting and expanding open spaces:** More than three-fourths of Arizonans in urban (81%), midsize (86%) and rural (77%) communities rate this action important.
- 5 Improving air quality and making the transition to clean energy:** These goals are related, since moving toward clean energy helps improve air quality.³⁸ More than seven in 10 Arizonans overall regard both goals as important, with Latino respondents more likely than any other subgroup to prioritize the transition to clean energy, at 83%. The transition to clean energy is more likely to be rated important by Democrats (94%) and independents (80%) than Republicans (49%).

Arizonans support a number of actions to ensure high quality of life and a sustainable future, including protecting rural water supplies, preventing forest fires, reducing heat islands in our urban and rural areas, and transitioning to clean energy.



Climate change is causing more extreme weather events that will likely continue to occur. Continuing the transition to clean energy and increasing the electrification of transportation are both important mitigating measures.

JEFF GULDNER

*Chairman & Chief
Executive Officer
APS*

Civic Engagement and Leadership

SHARED PUBLIC VALUE:

Arizonans want to work together to improve our communities, solve problems and keep building a democracy that works for all.

Despite Arizona's closely divided political landscape, most Arizonans recognize the need to work together to address critical challenges. **Three-fourths (75%) of Arizonans agree that they are willing to speak with others who have different views in order to solve problems**, while just 8% disagree. Most also express a sense of shared purpose, with 68% agreeing that everyone benefits when the state does well, and 56% expressing confidence that Arizonans can pull together to solve tough problems. In response to a question about their willingness to pay more taxes to support issues that are important to the future of the state, 44% said yes, 26% were unsure, and 31% said they are unwilling to do so.

WHERE ARIZONANS AGREE ACTION IS NEEDED

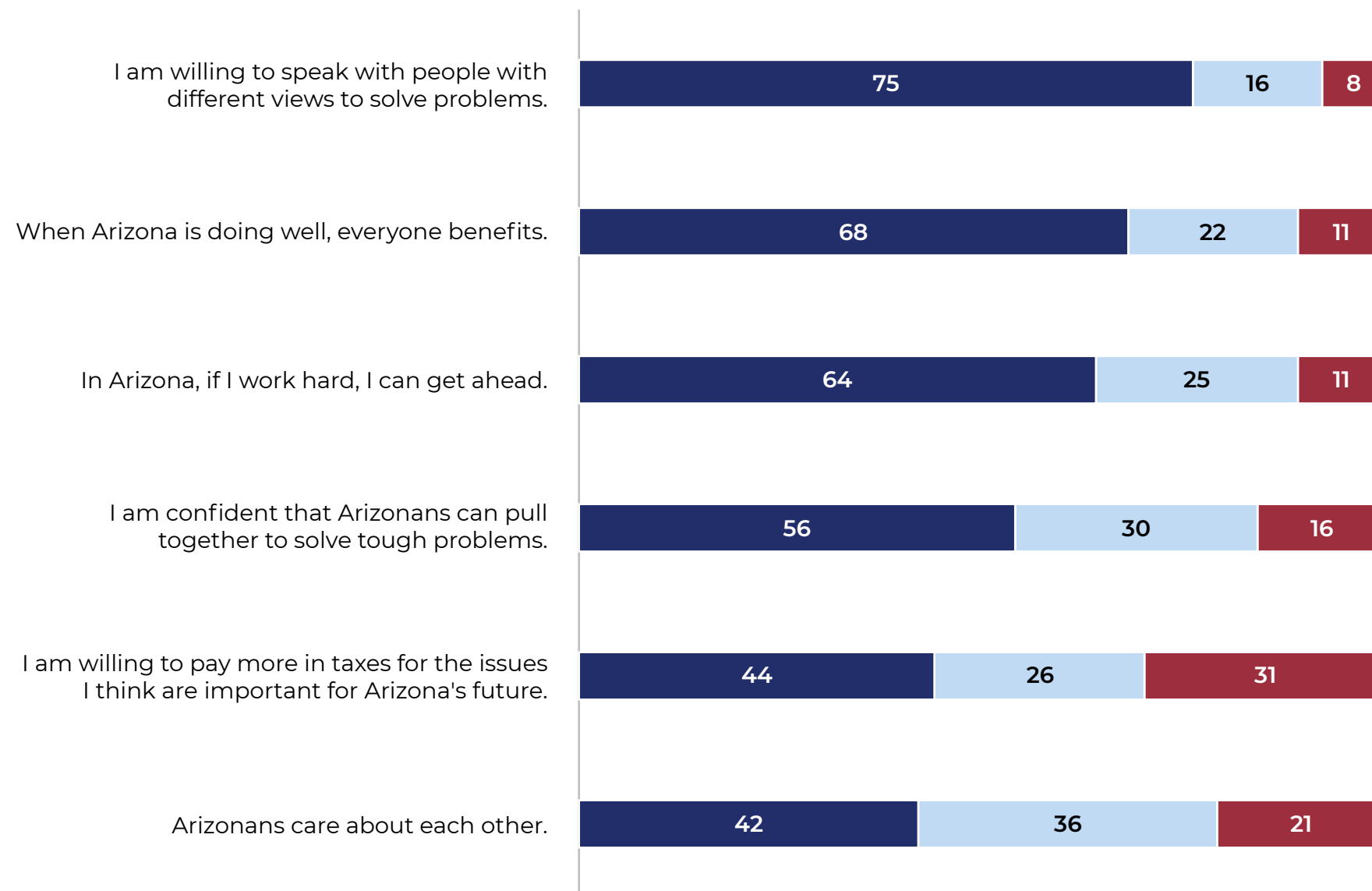
- 1 Create ways to come together to better understand and work through our differences.
- 2 Ensure a more responsive, transparent and data-driven culture among elected leadership.
- 3 Create a pipeline of civic leaders who are thinking long-term about the future.
- 4 Send all registered voters a ballot by mail, while maintaining in-person voting options — favored by 73%.
- 5 Offer early in-person voting over multiple weeks leading up to election day — favored by 79%.
- 6 Offer automatic voter registration when applying for a state ID/driver's license — favored by 77%.

Arizonans Are Willing to Work Together to Solve Problems

CHART 17:

Please rate your level of agreement or disagreement with each of the following.

● % Agree ● % Neutral ● % Disagree





Young professionals deeply want collaborative, mentorship relationships; they don't want to take the baton from older leaders, but to run with them in meeting the great challenges of our state.

ZACH YENTZER

Executive Director
Tucson Young Professionals

**Three-fourths (75%) of
Arizonans agree** that they are
willing to speak with others
who have different views in
order to solve problems.



Arizonans Strongly Support Making Voting Accessible and Convenient

While states across the country adapted to make accommodations for the pandemic in the 2020 presidential elections, Arizona drew upon a rich history of mail-in ballots and early voting to accommodate voters.³⁹ The 2020 Gallup Arizona Survey asked Arizonans whether they favor or oppose making two additional options available for voting: automatically registering Arizonans to vote when they apply for a driver's license or state ID and sending all registered voters a mail-in ballot. These have strong public support, with about three-fourths of Arizonans overall favoring each. Support for two other proposals — moving to ranked-choice voting and offering same-day voter registration — are more commonly favored by younger Arizonans.

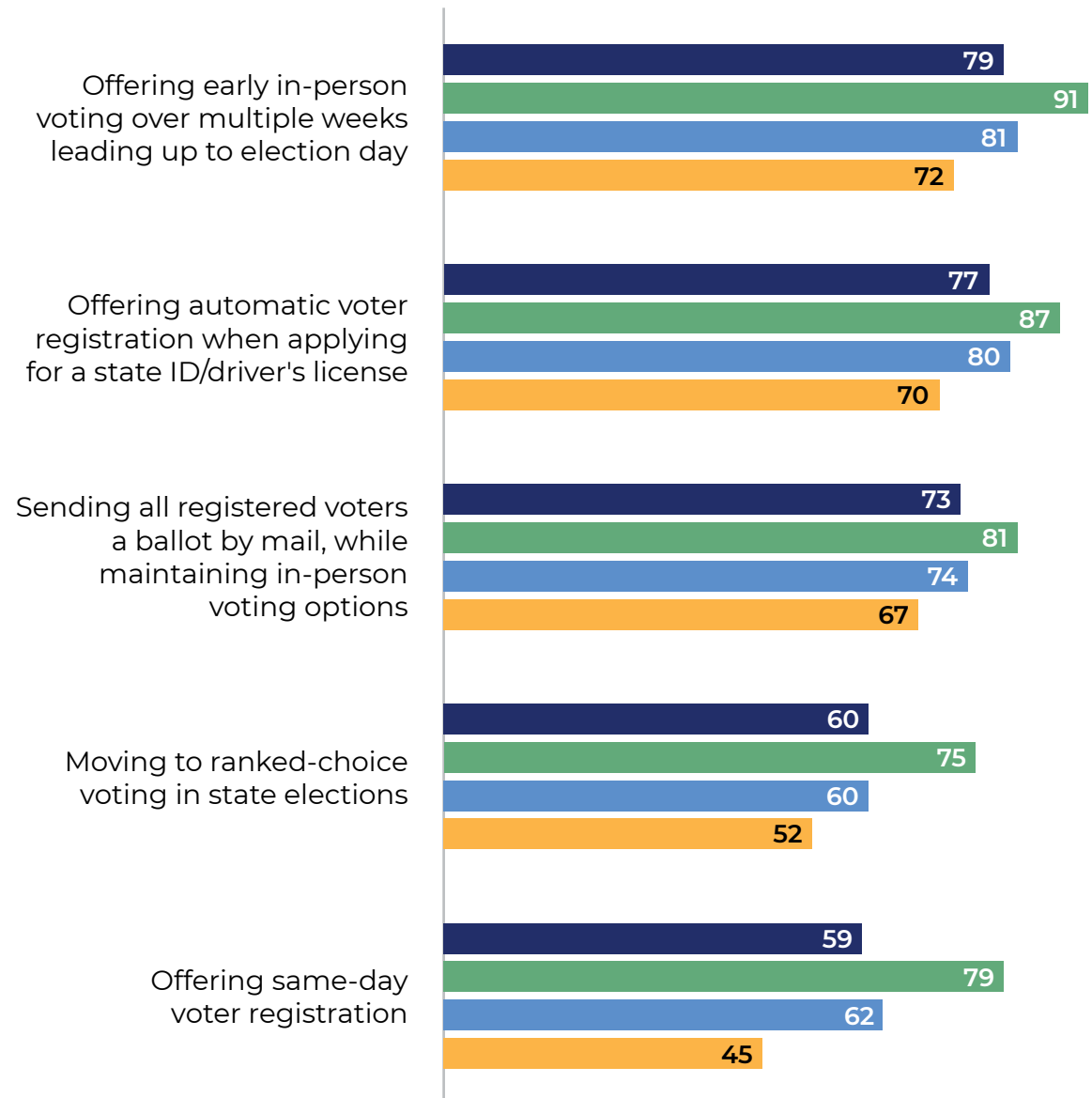
There is strong consensus among Arizonans for making voting more convenient. Roughly two-thirds of Republicans support early in-person voting and automatic voter registration when getting a driver's license.

CHART 18:

Do you favor or oppose the following changes to Arizona state elections?

% Favor

● % Arizonans Overall ● % 18-34 ● % 35-54 ● % 55+

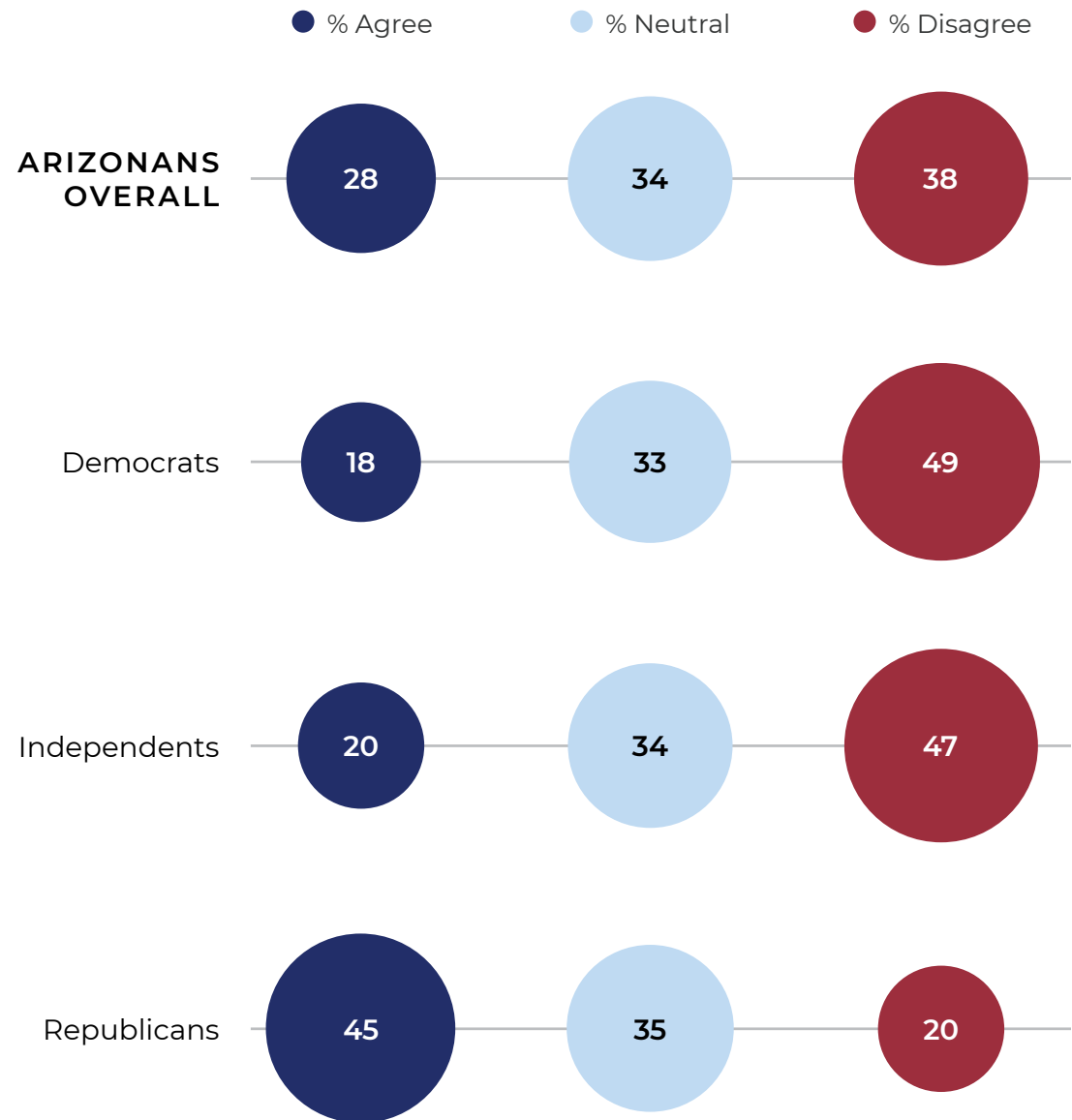


Arizonans Are Concerned About the Strength of Leadership

Though Arizonans favor working together on long-term problems facing the state, they do not believe elected leaders share this view. The 2009 Gallup Arizona Survey found that just 10% of respondents rated the performance of elected officials as “very good.” Similarly, most Arizonans find their elected leaders wanting in the 2020 survey. Only 28% of Arizonans agree with, “Arizona has strong leaders who can lead us through tough times,” while 38% disagree. Though Republicans were more likely than Democrats to agree with this statement, even among Republicans, less than half (45%) agree. Furthermore, the 32% of Arizonans who identify as political independents were much closer to Democrats than Republicans on this question.

CHART 19:

Please indicate your level of agreement with the following: Arizona has strong leaders who can lead us through tough times.



Arizona’s elected officials don’t fare much better on several more specific questions about their leadership. Close to one-third of Arizonans overall agree that elected leaders focus on long-term planning for the state’s future (37%), that they represent diverse Arizona voices (33%) and that they use data to make decisions.

Just 26% of Arizonans say elected officials work across party lines. Though they are more likely than Democrats to do so, less than half of Republicans agree with each statement.

TABLE 6:
Do you agree or disagree that Arizona's elected leaders currently ____?

% Agree

	ARIZONANS OVERALL	Democrats	Republicans	Independents
Focus on long-term, visionary planning for the future	37%	31%	48%	32%
Represent diverse Arizona voices	33%	27%	43%	28%
Use data to make decisions	32%	28%	37%	28%
Work across party lines	26%	23%	33%	25%



If we want to achieve *The Arizona We Want*, we need to elect people into office — starting at the school board level all the way up to the federal level — who share the same values as those detailed in this report.

CORAL EVANS
Former Mayor of Flagstaff



Every Arizonan is capable of greater civic engagement, and *The Arizona We Want* shows how eager our fellow residents are to step forward and do their part.

TAMMY MCLEOD

President & CEO
Flinn Foundation

Millennials Are Strongest Supporters of Expanding Voting Options

Younger Arizonans and Latino Arizonans are concerned about civic life and want electoral reform and long-term leadership. Millennials (36%) are less likely than older Arizonans (45%) to agree that Arizonans care about each other, but are more likely (49%) than older Arizonans (40%) to say they're willing to pay more in taxes for the issues that are important to Arizona's future.

Millennials were also the strongest supporters of all five electoral reforms, from 89% for early in-person voting to 67% for ranked-choice voting. Latino Arizonans were generally more supportive of the reforms than were other racial or ethnic groups, sometimes narrowly and sometimes by large margins. Latinos were the strongest supporters of early in-person voting (87%) and of mailing all voters a ballot (85%).

Millennials were the strongest supporters of all five electoral reforms, from 89% for early in-person voting to 67% for ranked-choice voting.

Fair, Just and Equitable Systems

WHERE ARIZONANS AGREE ACTION IS NEEDED

- 1 Address systemic racism as a key issue for the future success of the state.
- 2 Work to combat discrimination on the basis of gender, religion or sexual orientation.
- 3 Work to ensure the criminal justice system treats everyone fairly.
- 4 Reform Arizona prisons to focus more on rehabilitation, including substance abuse, mental health, and reentry programs and services — 77% agree.

SHARED PUBLIC VALUE:

Arizonans want fair, just and equal treatment of all people.

Only a minority of Arizonans believe that race relations in the state are good, with 28% of Arizonans agreeing race relations in the state are good and 43% disagreeing.⁴⁰ American Indian and Black Arizonans were especially unlikely to agree that race relations are good, at 18% and 19%, respectively. Three in 10 (30%) of Latino Arizonans agree that race relations are good, while 47% disagree.

The death of George Floyd and other unarmed Black men and women at the hands of law enforcement raised the visibility of race relations and the criminal justice system, sparking a nationwide dialogue and sustained demonstrations across the country over the summer of 2020 on the issue of racial justice.



Investing in Black Arizonans is critical to the future of Arizona's economy. The Grand Canyon State cannot reach its full growth and development potential without understanding and acting upon the merits of inclusive prosperity.

TENIQUA BROUGHTON

Executive Director

The State of Black Arizona

Arizonans' Experiences of Racial, Gender and Religious-Based Discrimination

A majority of Black Arizonans (53%) say they felt discriminated against because of their race in the past 12 months. About four in 10 Latino (39%), Asian (39%) and American Indian (38%) Arizonans also respond this way. These findings are significant, given the high percentage of Latinos living in Arizona, as well as the fact that Arizona is the state with the second highest percentage of American Indians in the country and the third highest number of American Indians overall.⁴¹ Two additional findings stand out with regard to other forms of discrimination addressed in the study: One-fourth of women respondents (25%) say they have felt discriminated against based on their gender and 28% of American Indian Arizonans have felt discriminated against because of their religion.

CHART 20:

Please indicate your level of agreement with the following: Race relations in Arizona are good.

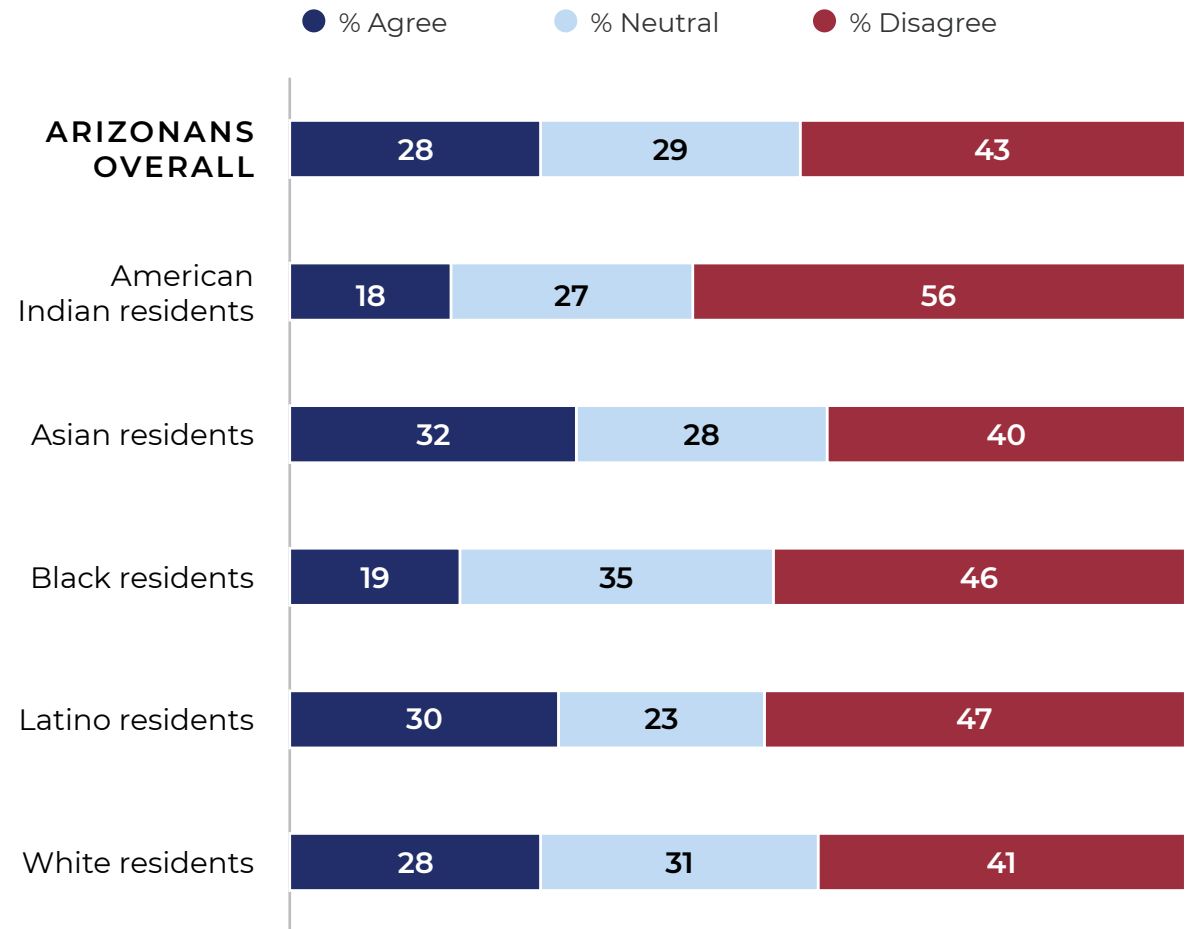


TABLE 7:

In the past 12 months, have you ever felt discriminated against because of your ____?

	Race/ethnicity	Gender	Religion/Not having a religion	Sexual orientation
ARIZONANS OVERALL	23%	18%	16%	6%
Men	23%	9%	16%	7%
Women	21%	25%	16%	4%
American Indian Arizonans	38%	14%	28%	12%
Asian Arizonans	39%	17%	15%	5%
Black Arizonans	53%	23%	17%	9%
Latino Arizonans	39%	17%	15%	6%
White Arizonans	11%	18%	17%	5%



Our state needs to prioritize the equality of all Arizonans, starting with our youngest and most vulnerable, especially in rural areas and communities of lower socioeconomic status. Arizona will succeed if we embrace, empower and enrich our diverse population and its unique cultural history.

CASEY ARELLANO

Attorney

The American Civil Liberties Union of Arizona

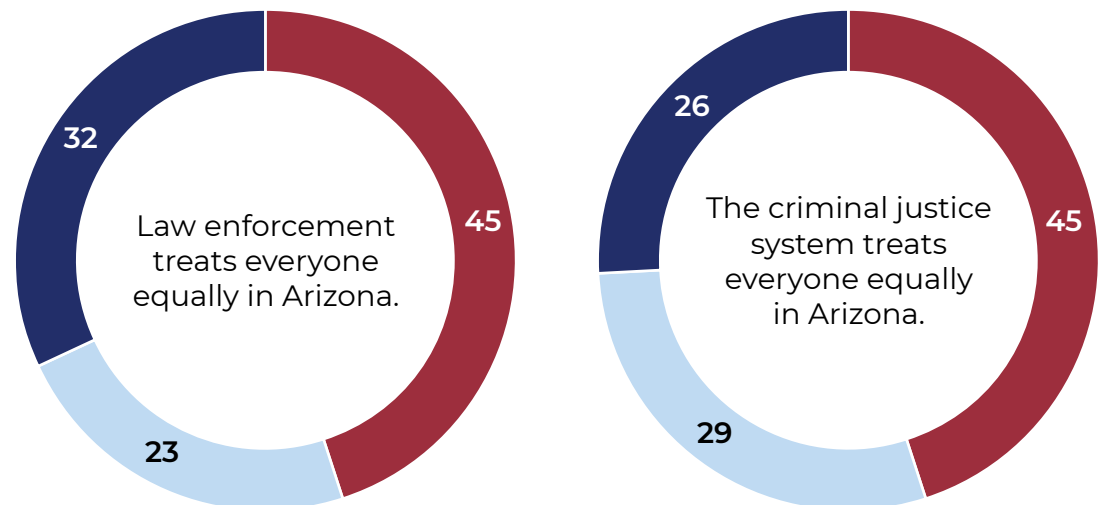
Arizonans Recognize Inequities in the Criminal Justice System and Support Reforms

As just one expression of the ways that systemic inequities show up in statewide systems, the 2020 Gallup Arizona Survey finds that Arizonans are more likely to disagree than agree that law enforcement and the criminal justice system treat everyone in the state equally. They are particularly skeptical of the state's criminal justice system, with just one in four (26%) agreeing that it treats everyone equally, and almost half (45%) disagreeing. Black and American Indian Arizonans are particularly likely to disagree that the criminal justice system treats everyone equally, at 59% and 53%, respectively.

CHART 21:

Please indicate your level of agreement with the following.

● % Agree ● % Neutral ● % Disagree

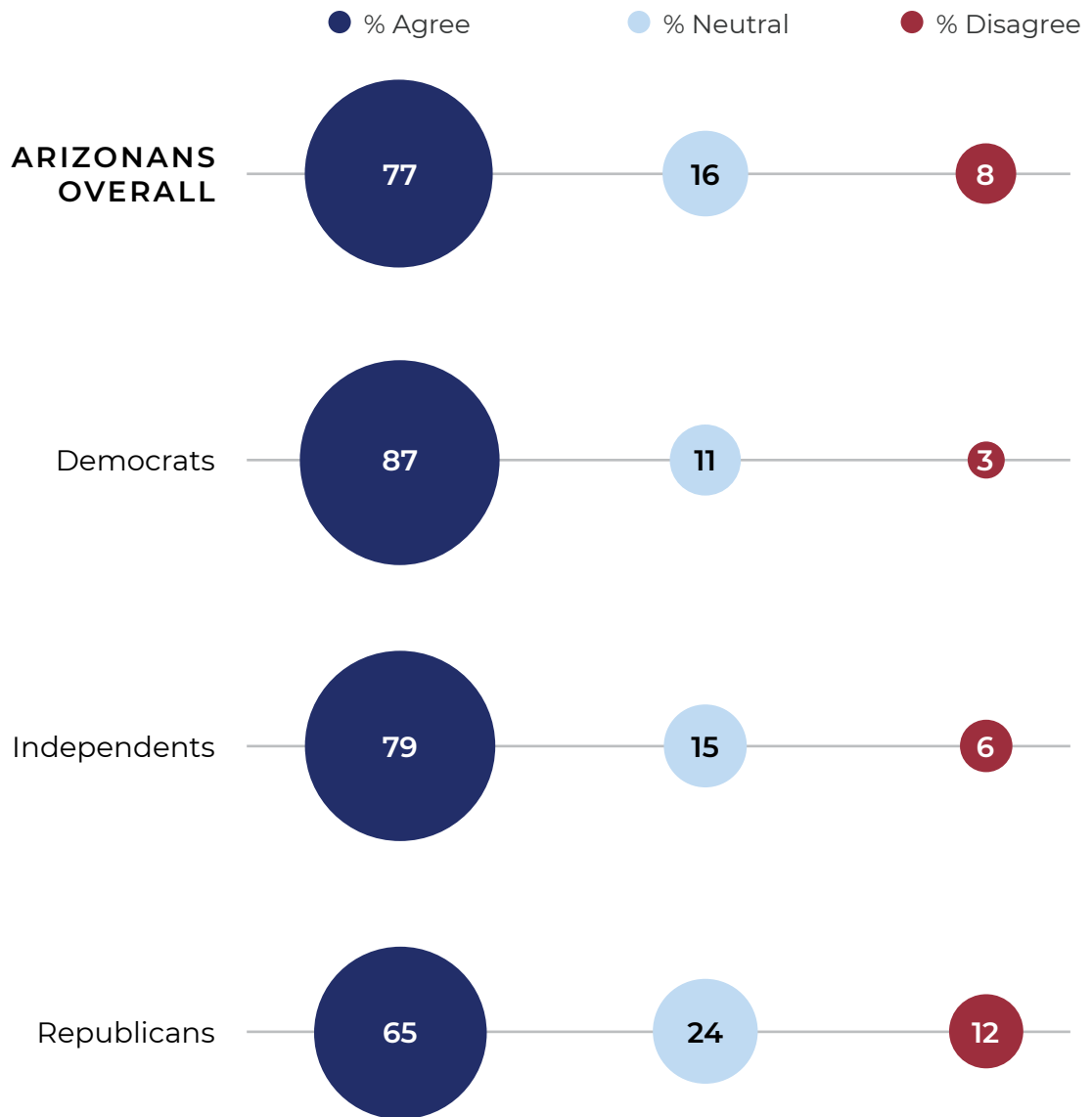


Arizonans Want Greater Focus on Rehabilitation in the Criminal Justice System

There is high consensus across the state that prisons should put a greater focus on rehabilitation, with 77% of Arizonans agreeing. When looking across major regions and demographic groups, at least 65% in all groups agree, including strong majorities in each political party. There is stronger support in some subgroups. For example, Millennials are somewhat more likely (83%) than older Arizonans (74%) to agree that state prisons should focus more on rehabilitation.

CHART 22:

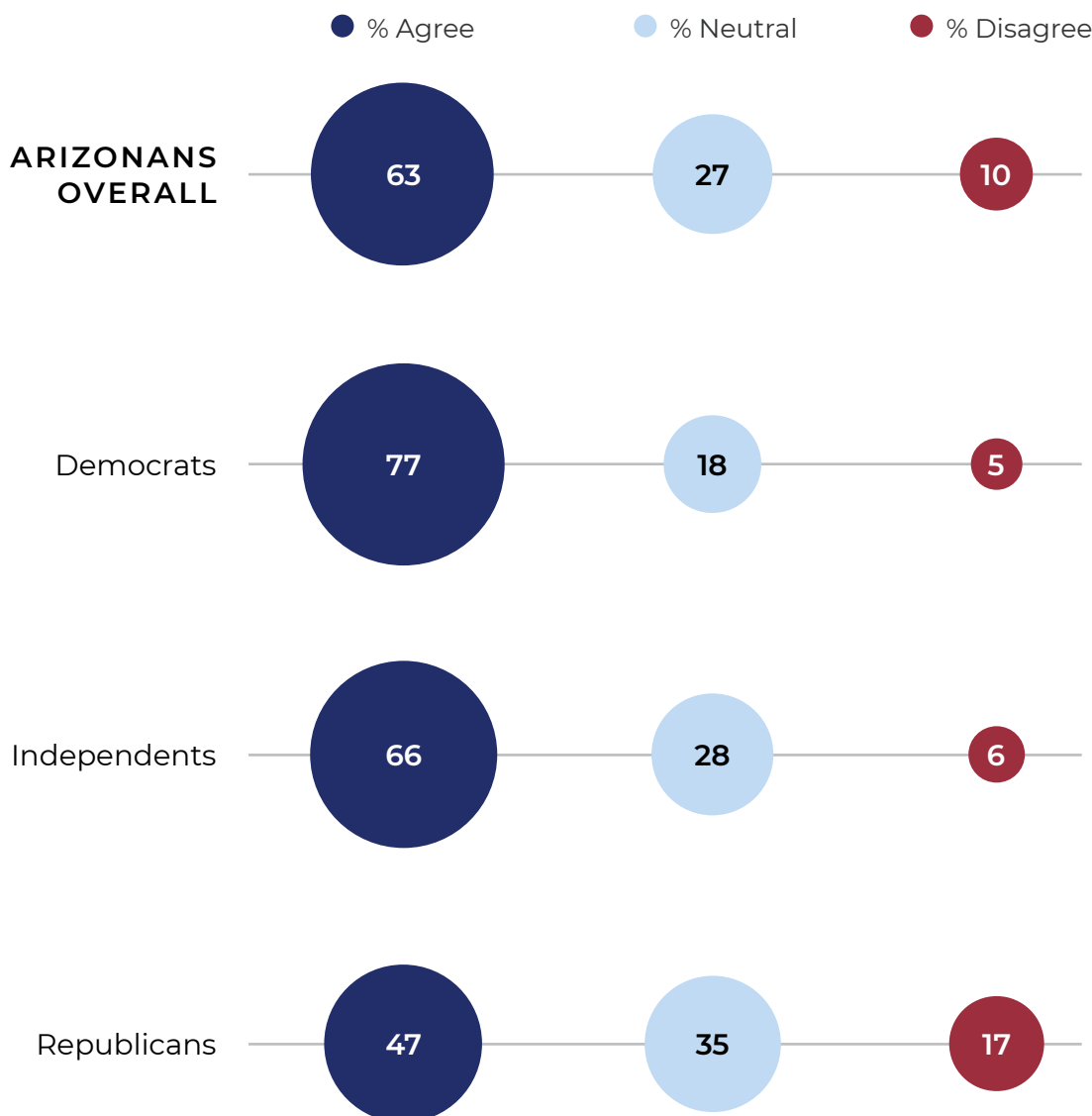
**Please indicate your level of agreement with the following:
Arizona prisons should focus more on rehabilitation,
including substance abuse, mental health and reentry
programs and services.**



There is somewhat less consensus about another debated aspect of Arizona's criminal justice system: the use of privately run prisons.⁴² Most Arizonans (63%) agree that the state's prisons should not be privately owned, but Republicans are less likely than Democrats to agree — 47% vs. 77%, respectively. Latino Arizonans (69%) are more likely than non-Latinos (61%) to agree that Arizona prisons should be government-owned, not privately owned.

CHART 23:

**Please indicate your level of agreement with the following:
Arizona prisons should be government-owned, not
privately owned.**



Immigration Reform

SHARED PUBLIC VALUE:

Arizonans support comprehensive immigration reform, including a pathway to citizenship and support for “DREAMers.”

Strong majorities of Democrats, Republicans and independents — and well over the 70% of Arizonans in all major regions and demographic groups required for consensus — support two objectives in particular. The vast majority of Arizonans, including 93% of Democrats and 80% of Republicans support comprehensive immigration reform that includes a pathway to citizenship for undocumented individuals.

As with a pathway to citizenship for immigrants overall, strong majorities of Democrats (95%) and Republicans (77%) in Arizona support a path to citizenship for Arizona’s 24,000 “DREAMers,” who were brought to the U.S. as children.⁴³

Partisan gaps are wider when it comes to regulating Arizona’s 370-mile border with Mexico and increasing deportations for those residing in the country illegally, with Republicans more likely than Democrats to support such efforts.

WHERE ARIZONANS AGREE ACTION IS NEEDED

% Support

- 86%** Enact comprehensive immigration reform that includes a pathway to citizenship.
- 86%** Create a path to citizenship for DACA recipients/“DREAMers” (residents without lawful immigration status who were brought to Arizona as children).

CHART 24:

Do you support or oppose the following immigration policies?

% Support

Comprehensive immigration reform that includes a pathway to citizenship



A path to citizenship for DACA recipients/“DREAMers”



Statewide Consensus Across Geographies in Supporting Pathways to Citizenship

Arizonans' support for comprehensive immigration reform is largely consistent across rural (79% support) and urban communities (87%). Further, 86% of urban residents and 83% of rural residents support a pathway to citizenship for “DREAMers,” with the highest support regionally in Southeast Arizona (91%) and Pima County (90%).

Arizonans strongly support comprehensive immigration reform and a pathway to citizenship for Arizona's 24,000 "DREAMers."



The future of Arizona is bright and it is up to us. We have, in our hands, the opportunity to open doors for all students regardless of immigration status [...] the success of our immigrant and Latinx students is interconnected to the wellbeing and success of our state.

REYNA MONTOYA

Founder & CEO

Aliento

The Arizona We Build: A Call to Action

Arizona is a laboratory of democracy, driven by our nation's highest ideals of liberty, equality, justice and the pursuit of happiness. The state is rich in geographic and demographic diversity — and though we may differ in backgrounds and experiences — we have learned through this work that we have much in common, agree on more than we disagree, and share a set of core public values that can help inform our actions and create a stronger, brighter future for all. Arizonans across the vast expanse of our state, in our cities, towns and rural communities, across age, race and ethnicity, education, and political views overwhelmingly agree on the things that matter most. The 2020 Gallup Arizona Survey has given voice to Arizonans and provides the basis on which to build an agenda for the future. **Together we can build *The Arizona We Want*.**



Our Shared Public Values

- 1 a highly educated and skilled population
- 2 affordable healthcare that covers preexisting conditions and provides accessible mental health services
- 3 good-paying jobs and the education and training needed for all Arizonans to fully participate in a vibrant economy
- 4 sustainable practices that protect our air, land and water, and support a high quality of life for all
- 5 civic engagement that solves problems and democracy that works for all
- 6 fair, just and equal treatment of all people
- 7 comprehensive immigration reform, including a pathway to citizenship and support for "DREAMers"

Actions to Drive Arizona Forward

EDUCATION

- Ensure all Arizona public schools have highly qualified teachers and principals.
- Increase the number of Arizona high school graduates that enroll in universities, community colleges or technical/trade schools.
- Close gaps in educational outcomes for vulnerable populations (e.g., low-income students, students with disabilities, English language learners).
- Provide affordable, accessible and reliable internet and technology to all students.
- Make civics education a priority in K-12 education.
- Structure the school day and school year to better match the needs of working parents.
- Reduce the financial barriers to attending college.
- Give Arizona schools the flexibility to tailor learning to each child.
- Spend more money on K-12 public education

HEALTH AND WELLBEING

- Guarantee affordable healthcare and insurance for Arizonans with preexisting health conditions.
- Make mental health services available and affordable for all Arizonans who need them.
- Ensure all Arizonans can get quality healthcare without risk of financial harm.
- Expand public reporting on the quality of hospitals and healthcare facilities.
- Improve state-level management of public health emergencies.
- Expand programs to reduce substance abuse.
- Guarantee coverage of telemedicine services by health insurance providers.
- Increase access to wellness programs and alternative medicine.
- Expand Arizona's Medicaid (AHCCCS) program to include more lower-income residents.

JOBS AND ECONOMIC OPPORTUNITY

- Create more opportunities to build careers in Arizona, especially for young people.
- Improve economic stability for lower-wage workers through improved work benefits, greater education and training, and opportunities to advance.
- Improve pay equality and opportunities for promotion.
- Provide more affordable, high-quality options for childcare.
- Ensure equitable and inclusive economic recovery.

ENVIRONMENT AND SUSTAINABLE FUTURE

- Preserve and protect Arizona's rivers, natural areas and wildlife.
- Put regulations in place to protect rural water supplies.
- Increase spending and measures to prevent forest fires on state land.
- Reduce the heat island in our urban areas and across the state.
- Protect and expand open spaces for parks and outdoor recreation.
- Improve air quality.
- Transition to clean energy.

CIVIC ENGAGEMENT AND LEADERSHIP

- Create ways to come together to better understand and work through our differences.
- Ensure a more responsive, transparent, data-driven culture in elected leadership.
- Create a pipeline of civic leaders who are thinking long-term about the future.
- Offer early in-person voting over multiple weeks leading up to election day.
- Offer automatic voter registration when applying for a state ID/driver's license.
- Send all registered voters a ballot by mail, while maintaining in-person voting options.

FAIR, JUST AND EQUITABLE SYSTEMS

- Address systemic racism as a key issue for the future success of the state.
- Work to combat discrimination on the basis of gender, religion or sexual orientation.
- Work to ensure the criminal justice system treats everyone fairly.
- Reform Arizona prisons to focus more on rehabilitation, including substance abuse, mental health, and reentry programs and services.

IMMIGRATION REFORM

- Enact comprehensive immigration reform that includes a pathway to citizenship.
- Create a path to citizenship for DACA recipients/"DREAMers" (residents without lawful immigration status who were brought to Arizona as children).



It is very exciting to be in a place like Arizona where our democracy is evolving so quickly, our shared public values are so clear, and our willingness to innovate is so strong that the future is very bright. The places where we agree are powerful. The outcomes noble. The path is clear, and now we just need to move our energy to the places we agree and build *The Arizona We Want*.

MICHAEL CROW

President

Arizona State University

Leaders in every sector — from business, government, community organizations, K-12 and higher education to nonprofits, faith communities, philanthropy and individuals — and in communities across the state — **have an important role to play in moving Arizona forward.**

Reflections and Next Steps: Coming Together to Create *The Arizona We Want*

The Arizona We Want: The Decade Ahead provides Arizona an agenda for driving our state forward. We know where we agree. We know what Arizonans want. Now, it's time to get to work. Leaders in every sector — from business, government, community organizations, K-12 and higher education to nonprofits, faith communities, philanthropy and individuals — and in communities across the state — have an important role to play in moving Arizona forward. It will take all of us coming together, aligned on the same shared public values, with a felt responsibility to one another, to create *The Arizona We Want*.

The priorities of Arizonans won't be realized without a concerted and unified effort. Offered next are some reflections on some of the challenges and opportunities uncovered in this work and possible paths forward.

WHAT ARIZONANS WANT AND PUBLIC POLICY SOLUTIONS

In some areas, there appears a disconnect between what Arizonans say they want and the priorities of policymakers. For example, 88% of Arizonans say that reducing the financial barriers of going to college is important, yet over the past 10 years, Arizona has systematically defunded our community college system. Civic engagement and voting are other examples. The survey findings show strong support and clear consensus among Arizonans for making voting accessible and convenient for everyone, however, in our state legislature, bills that would do the opposite have been considered.



Improvement takes long-term planning and that planning has to be data-driven.

TOM BELSHE

Executive Director

League of Arizona Cities and Towns



As we look to the future, tribal nations in Arizona will continue on the path toward strengthening tribal sovereignty, expanding civic engagement and addressing the ever-changing business and economic environment in Arizona.

MARIA DADGAR

Executive Director

Inter Tribal Council of Arizona

ON DEEP DISPARITIES REVEALED IN THE FINDINGS

The 2020 Gallup Arizona Survey findings spotlight challenges where significant disparities exist and where there are opportunities to ensure more Arizonans have a place in Arizona's success. This wealth of data prompts more questions than it answers and reveals the need to delve more deeply into the underlying conditions that can support equitable opportunity and greater quality of life. The Arizona Progress Meters can help track and report on issues that matter to Arizonans, helping inform dialogue and data-based decision-making and action.

ON THE NEED FOR CONVERSATION IN AND WITH COMMUNITIES

Community data-driven dialogue on our shared public values is essential. The findings of this report can be used to provide a framework for community discussion on what brings us together and where we have more in common than politics and public discourse might suggest. They help us begin the civic repair work needed to restore our faith in one another and our leaders to represent our deepest shared aspirations. The survey findings make it clear that Arizonans are willing to work with others of different viewpoints to solve problems. That is a significant finding and one that we should embrace. As Arizonans, we can build on this.

ON THE OPPORTUNITY FOR INDIVIDUAL REFLECTION

The findings shared in this report will, hopefully, prompt all of us to reflect and seek to understand one another's experiences in a new light. Here are a few guiding questions:

- How does the information resonate with your own experience as an Arizonan?
- What surprised you?
- What makes you hopeful about the future?
- What would you like to learn more about?
- What role are you already playing in achieving *The Arizona We Want*? What more can you do?

WHERE DO WE GO FROM HERE?

Since its founding in 2002, the Center for the Future of Arizona has helped shaped the future of our state through an action-oriented agenda. More than a think tank, CFA is a “do tank” that combines research with collaborative partnerships and initiatives that serve the public interest and common good. But Arizona's agenda does not belong to CFA. It is an agenda for Arizonans that is based on what they have said matters most to them. We all have a role to play in achieving *The Arizona We Want*. CFA can bring these findings to communities across the state, facilitate civil dialogue and support communities in achieving their goals.

Momentum is building. CFA has heard from many leaders, community organizations, and everyday Arizonans who are eager to take the findings from this survey and act on them. We also know that there is great work already underway in communities across the state to build a stronger Arizona. This includes efforts like Achieve60AZ, Arizona Town Hall's 2021 Creating Vibrant Communities statewide focus, the Arizona Center for Civic Leadership's newly established partnership to strengthen civic life with CFA, ALL in Education's recent MAPA report, the State of Black Arizona's 2021 report, *Driving Local Investment in Black Arizonans*, and regional organizations such as NACOG, SEAGO and others embracing the Arizona Progress Meters as benchmarks of regional success. These are just a few examples of important initiatives that directly support and advance the findings shared in this report.



Arizona has long been a place where big ideas are embraced and celebrated. Now more than ever, it is critical that we collaborate across industries and disciplines to achieve a bold vision for the future of our state.

SANDRA WATSON

President & CEO
Arizona Commerce Authority

We all have a role to play in achieving *The Arizona We Want*. **Let's take action together** to create a stronger and brighter future for Arizona.

HOW TO GET STARTED

Achieving *The Arizona We Want* is up to all of us. Here are some ways that businesses, government offices, nonprofits, community organizations, educational organizations, philanthropic groups, communities and individuals can get started.

- ☐ Take the 2020 Gallup Arizona Survey (as an individual or organization), which is available on the CFA website and compare your responses with others in our state.
- ☐ Publicize and share the findings in the report. Encourage organizations and others you know to get involved by reading *The Arizona We Want: The Decade Ahead*.
- ☐ Explore how the findings from the 2020 Gallup Arizona Survey align with your organization's goals and actions.
- ☐ Use the survey findings to inform policy, practice and investments.
- ☐ Collaborate with others through local, regional or state initiatives to make progress toward the shared public values.
- ☐ Partner with CFA to host a community conversation to explore the survey findings, unpack questions and spark action.
- ☐ Take a look at the actions that Arizonans want and identify areas where you or your organization can make a difference.

Methods

The Center for the Future of Arizona enlisted the services of Gallup in 2020 to conduct the second decennial survey of Arizonans to refresh and inject new insights, building on the original 2009 Gallup Arizona Survey.



Results are based on mail and web surveys collected between August 28, 2020 and October 26, 2020, with a random sample of 3,586 adults, age 18 and older, living in Arizona. Gallup randomly selected individuals to participate in the study using an address-based sample (ABS) frame. Over 29,000 Arizona households received the survey. The sample size was large because it needed to be statistically accurate for different regions of the state, as well as different demographic groups. The sample included a sample of randomly selected households and oversamples of households in rural areas and households that were predicted to have Latino, American Indian or Black residents. Respondents had the opportunity to respond to the survey via web or mail. Surveys were conducted in English and Spanish.

After data collection, the resulting sample was weighted to correct for unequal selection probability and nonresponse. The data are also weighted to match the state demographics of gender, age, race, Hispanic ethnicity, education, region and population density. Demographic weighting targets are based on the U.S. Census Bureau, 2014-2018 American Community Survey 5-Year Estimates. All reported margins of sampling error include the computed design effects for weighting.

- For results based on this sample of Arizona adults, the margin of sampling error is ± 3 percentage points at the 95% confidence level. Margins of sampling error are larger for subgroups.
- For results based on the total sample of rural Arizonans, the margin of sampling error is ± 11 percentage points at the 95% confidence level.
- For results based on the total sample of Hispanics, the margin of sampling error is ± 7 percentage points at the 95% confidence level.
- For results based on the total sample of American Indians, the margin of sampling error is ± 14 percentage points at the 95% confidence level.
- For results based on the total sample of African Americans, the margin of sampling error is ± 16 percentage points at the 95% confidence level.

In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion surveys.

How Do We Define Consensus on Shared Public Values?

There are different types of shared values (e.g., personal values, organizational values, national values, etc.). Public values are those that address the expectations and obligations that members of the public have between each other, their communities and workplaces, and their government. The set of shared public values identified in this work comprise *The Arizona We Want*.

The report defines a shared public value as a statement or set of action items supported by at least 70% of Arizonans across the state on the same topic. For example, 84% of respondents agreed that a highly educated and skilled population is good for Arizona and the action items in the education section call-out box serve to support that outcome. The 70% threshold is a very robust criterion for identifying consensus and many actions were met with even higher consensus, noted throughout the report.

This level of consensus also means that there was a high level of support across political affiliation, demography and regions in the state, including rural and urban environments. This provides confidence that the identified shared public values truly enjoy strong and broad consensus across Arizona's diverse geographic, demographic and political landscapes.

Items rated "important" in the call-out boxes are based on the percentage of Arizonans who rated them with a "5" or "4" on an importance scale ranging from 1 (not at all important) to 5 (very important). Similarly, results for items gauging agreement are based on residents giving a "5" or "4" on an agreement scale ranging from 1 (strongly disagree) to 5 (strongly agree).

Finally, not all action items listed in the call-out boxes include percentages in favor; some are based on results not asked directly as proposed goals. For example, low-income survey respondents reported low levels of satisfaction with education and career training opportunities and the corresponding call-out box action is listed as "increase education and career training opportunities." These kinds of action items were those that emerged from asking respondents about their everyday life experiences and creating a corresponding action based on their response.

Acknowledgements: Gallup Arizona Project Funding Partners

VISIONARY LEADERS (\$250,000+)



INNOVATOR PARTNERS (\$100,00-\$249,999)



EMPOWER PARTNERS (\$25,000-\$49,999)



CHAMPIONS OF CFA (\$10,000-\$24,999)

AAA Arizona
Arizona Public Service
Bank of America
Chicanos Por La Causa
McCarthy Building Companies, Inc.
Sonora Quest Laboratories

FRIENDS OF CFA (\$1,500-\$9,999)

A for Arizona
Arizona Board of Regents
Arizona State University Alumni Association
Arizona K12 Center
Fiesta Bowl Charities
First Things First
Goodmans Interior Structures
Greater Phoenix Chamber of Commerce
Greater Phoenix Leadership
Greater Yuma Economic Development Corporation
Kroger/Fry's Food Stores
LISC Phoenix

Local First Arizona
Mac and Russ Perlich
Magellan Complete Care of Arizona
Maricopa Community Colleges
Northern Arizona Council of Governments
PetSmart
PHX East Valley Partnership
Pinal County
Rodel Foundation of Arizona
Salt River Project
Stand for Children Leadership Center
The Nature Conservancy
Tribal Policy People
US Bank
University of Phoenix
Valle del Sol
Valley Leadership
WESTMARC

REPORT CONTRIBUTORS

CFA Board of Directors

José A. Cárdenas, Director
Lattie F. Coor, Chairman and
Founding Director, Center for
the Future of Arizona
George Dean, Director
Jill Harrison, Director
Carmen Heredia, Director
Paul Luna, Director
Ruth McGregor, Director
Katosha Nakai, Director
Bill Post, Director
Ronald Shoopman, Director
Don Smith, Director

CFA Staff

Sybil Francis, President & CEO
Amanda Burke, Managing
Director, Strategic Initiatives &
Impact
Kristi Tate, Director, Civic Health
Initiatives
Megan McWenie, Manager,
Strategic Operations
Robert Raygoza, Director,
Development
CFA Senior Fellows
Ellen Babby
Pat Beaty
Larry Edward Penley

Gallup

Joe Daly, Senior Partner
Steve Crabtree,
Senior Consultant
Lauren Gehring,
Graphic Designer
Jenny Marlar,
Senior Methodologist
Angelina
Theodorou, Methodologist

Critical Readers

Cathleen Barton, Cathleen
Barton Consulting
Betsey Bayless, Valleywise
Health (Retired)
Tom Belshe, League of Arizona
Cities and Towns
Quintin Boyce, Roosevelt School
District
Bryan Brayboy, Arizona State
University
Teniqua Broughton, State of
Black Arizona
David Brown, Valley Leadership
Foundation
Gretchen Buhlig, ASU
Foundation
David Byers, Arizona Supreme
Court
Rita Cheng, Northern Arizona
University
Michael Crow, Arizona State
University
Gene D'Adamo, Nina Mason
Pulliam Charitable Trust
Maria Dadgar, Inter Tribal
Council of Arizona
Marilee Dal Pra, First
Things First
Reetika Dhawan, Arizona
Western College

Fred DuVal, DuVal & Associates
Jon Ehlinger, Garcia Family
Foundation
Julie Engel, Greater Yuma
Economic Development
Corporation
Coral Evans, Former Mayor of
Flagstaff
Karen Francis-Begay, University
of Arizona
Rebecca Gau, Stand for Children
Arizona
Neil Giuliano, Greater Phoenix
Leadership
Steven Gonzales, Maricopa
Community Colleges
John Graham, Sunbelt Holdings
Jeff Guldner, Arizona Public
Service
Erin Hart, Expect More Arizona
Lindsay Herf, Arizona Justice
Project
Patricia Hibbeler, Phoenix
Indian Center
Mignonne Hollis, Arizona
Regional Economic
Development Foundation
Tara Jackson, Arizona Town Hall
Christine Kajikawa Wilkinson,
Arizona State University
Kara Kelty, Flagstaff Unified
School District Governing
Board and Flagstaff City
Council (Former)
Eileen Klein, Arizona Board of
Regents (President Emerita)
Kimber Lanning, Local First
Arizona
David Martinez, Vitalyst Health
Foundation

Tammy McLeod, Flinn
Foundation
Reyna Montoya, Aliento
Rich Nickel, College Success
Arizona
Jackie Norton, Rodel
Foundation of Arizona
Stephanie Parra, ALL in
Education
Julie Pastrick, Greater Flagstaff
Chamber of Commerce
Suzanne Pfister, Vitalyst Health
Foundation
Robin Reed, Black Chamber of
Arizona
Mary Jane Rynd, Virginia G.
Piper Charitable Trust
Daniel Stellar, The Nature
Conservancy of Arizona
Luke Tate, Arizona
State University
David Verdugo, Santa Cruz
Valley Unified School District
No. 35
Monica Villalobos, Arizona
Hispanic Chamber of
Commerce
Andrea Whitsett, Morrison
Institute for Public Policy
Steve Zylstra, Arizona
Technology Council

Illustrations

Terry Moody

Photography

Getty Images
Unsplash Images

Endnotes

- 1 World Population Review (2021). Arizona population 2021. <https://worldpopulationreview.com/states/arizona-population>
- 2 Dougherty, C. (2020). "Arizona Boom Draws Californians and Changes Political Hue." *New York Times*, March 15, 2020. <https://www.nytimes.com/2020/03/15/business/economy/arizona-economy-primary.html>
- 3 Inter Tribal Council of Arizona. (2020). <https://itcaonline.com/>; Arizona Department of Environmental Quality. (2020) Tribal Relations. <http://www.azdeq.gov/tribal>
- 4 Dougherty, C. (2020). "Arizona Boom Draws Californians and Changes Political Hue." *New York Times*, March 15, 2020. <https://www.nytimes.com/2020/03/15/business/economy/arizona-economy-primary.html>
- 5 American Immigration Council (2020). Fact Sheet: Immigrants in Arizona. August 6, 2020. <https://www.americanimmigrationcouncil.org/research/immigrants-in-arizona>
- 6 Stebbins, S. & Suneson, G. (2020). "The States With the Best and Worst Economies." 24/7 Wall Street, August 25, 2020. <https://247wallst.com/special-report/2020/08/25/the-states-with-the-best-and-worst-economies-4/3/>
- 7 World Population Review (2021). Arizona population 2021. <https://worldpopulationreview.com/states/arizona-population>
- 8 Adamy, J. & Overberg, P. (2020). "Census Estimates U.S. Population Grew 8% in Last Decade, Slowest Since the 1930s." *Wall Street Journal*, December 15, 2020. <https://www.wsj.com/articles/u-s-population-grew-8-to-332-6-million-in-last-decade-11608069254>
- 9 Center for the Future of Arizona. (2015). Vision 2025: Arizona Comes of Age. https://www.arizonafuture.org/media/zciiorfl/vision_2025_arizona_comes_of_age.pdf
- 10 Walker, L. (2019). "Arizona still nets gain of residents from other states." *Phoenix Business Journal*, December 26, 2019. <https://www.bizjournals.com/phoenix/news/2019/12/26/arizona-still-nets-gain-of-residents-from-other.html>
- 11 Seidman Research Institute. (2021). Job Growth By Year. <https://seidmaninstitute.com/job-growth/year/>
- 12 Americans Immigration Council (2020). Immigrants in Arizona. https://www.americanimmigrationcouncil.org/sites/default/files/research/immigrants_in_arizona.pdf
- 13 Census Reporter. (2021). Arizona. <https://censusreporter.org/profiles/04000US04-arizona/>
- 14 Census Viewer. (2021). Population of Arizona. <https://censusreporter.org/profiles/04000US04-arizona/>; <http://censusviewer.com/state/AZ>
- 15 World Population Review (2021). Arizona population 2021. <https://worldpopulationreview.com/states/arizona-population>
- 16 Census Viewer. (2021). Population of Arizona. <https://censusreporter.org/profiles/04000US04-arizona/>; <http://censusviewer.com/state/AZ>
- 17 Center for American Progress (2012). Arizona's Demographic Changes. <https://www.americanprogress.org/issues/poverty/news/2012/02/28/11060/arizonas-demographic-changes/>

- 18 U.S. Census Bureau. (2020). Southern and Western Regions Experienced Rapid Growth This Decade. May 21, 2020. <https://www.census.gov/newsroom/press-releases/2020/south-west-fastest-growing.html>; Gallen, T. (2019). "Phoenix leads US in population growth, new Census data shows." *Phoenix Business Journal*, May 23, 2019. <https://www.bizjournals.com/phoenix/news/2019/05/23/phoenix-leads-us-in-population-growth-new-census.html>
- 19 World Population Review (2021). Pinal County Population. <https://worldpopulationreview.com/us-counties/az/pinal-county-population>
- 20 World Population Review (2021). Population of Counties in Arizona. <https://worldpopulationreview.com/us-counties/states/az> U.S. Census Bureau. (2020). The 15 Fastest-Growing Large Cities - By Percent Change: 2018-2019. <https://www.census.gov/library/visualizations/2020/demo/fastest-growing-cities-2018-2019.html>
- 21 Draplin, D. (2020). "Three Arizona cities in top 10 for best places to find a job in 2020." *The Center Square*, January 3, 2020. https://www.thecentersquare.com/arizona/three-arizona-cities-in-top-10-for-best-places-to-find-a-job-in-2020/article_500e9b3a-2e66-11ea-b70d-ebde57516731.html
- 22 Stone, E. (2020). "As Arizonans battle respiratory pandemic, Phoenix air quality earns poor marks." *Arizona Republic*, April 23, 2020. <https://www.azcentral.com/story/news/local/arizona-environment/2020/04/23/arizona-battles-covid-19-phoenix-air-earns-bad-marks/3008574001/>
- 23 U.S. Census Bureau. (2020). The 15 Fastest-Growing Large Cities - By Percent Change: 2010-2019. <https://www.census.gov/library/visualizations/2020/demo/fastest-growing-cities-2010-2019.html>
- 24 Gallup World Poll, 2020 U.S. results.
- 25 Francis, S. (2019). "Too many millennial college grads are leaving Arizona. How do we keep them?" *AZCentral*, June 29, 2019. <https://www.azcentral.com/story/opinion/op-ed/2019/06/29/millennial-college-graduates-leave-arizona-keep-them-affordable-housing-debt/1573390001/>
- 26 National Assessment Governing Board. (2019). Arizona: The Grand Canyon State Charts Progress on NEAP. <https://www.nagb.gov/content/nagb/assets/documents/newsroom/press-releases/2019/arizona-narrative-20190621.pdf>
- 27 Center for the Future of Arizona. (2021). Education Progress Meter. <https://www.arizonafuture.org/az-progress-meters/education/overview/>; Full descriptions of categories in Table 2 are as follows: Quality Early Learning: Percent of AZ 3- and 4-yearold children in quality early learning settings (2019), 3rd Grade Reading: Passing rate for 3rd grade reading on state exam (2019), 8th Grade Math: Passing rate for 8th grade math on state exam (2019), High School Graduation: Percent of AZ high school students who graduate in 4 years (2019), Opportunity Youth: Percent of 16- to 24-year-olds who are NOT in school or working (2019), Post High School Enrollment: Percent of AZ HS graduates enrolled in college the semester following graduation — includes in-state and out-of-state universities, community colleges or private, postsecondary trade schools (2018), Postsecondary Attainment: Percent of Arizona residents age 25 to who have completed a two- or four-year degree or received an industry certificate (2019). The Arizona Education Progress Meter was jointly developed by the Center for the Future of Arizona and Expect More Arizona.
- 28 Arizona Board of Regents. (2020). Postsecondary Attainment Report. <https://www.azregents.edu/sites/default/files/reports/postsecondary-attainment-report-fy2020.pdf>
- 29 Arizona Governor Doug Ducey Office of Education. Achieve60AZ. <https://education.azgovernor.gov/edu/achieve60az-0>
- 30 Associated General Contractors of America. (2018). "2018 Workforce Survey Results: Arizona Results." https://www.agc.org/sites/default/files/Files/Communications/2018_Workforce_Survey_Arizona.pdf

- 31 College Success Arizona. (2015). Doubling Arizona's Economic Growth: The Potential Fiscal and Social Gains from Increasing Postsecondary Attainment.
<https://collegesuccessarizona.org/wp-content/uploads/2016/01/Doubling-Arizona%E2%80%99s-Economic-Growth-No-Large-Photos.pdf>
- 32 Arizona Hispanic Chamber of Commerce. (2020). Datos: The state of Arizona's Hispanic market.
- 33 Arizona Department of Education. (2020). Arizona October 1 enrollment figures 2020-2021 school year.
- 34 Arizona Department of Health Services. (2019). 2019 Arizona State Health Assessment.
<https://www.azdhs.gov/documents/operations/managing-excellence/2019-state-health-assessment.pdf>; Melhem, W. (2020). "Arizona third-worst in per capita healthcare workers amid pandemic." *AZMirror*, April 3, 2020.
<https://www.azmirror.com/2020/04/03/covid-19-arizona-third-worst-in-per-capita-health-care-workers-amid-pandemic/>
- 35 City of Phoenix. (2020). Jobs magnet: Study ranks metro Phoenix No. 1 nationally for attracting, retaining workers. December 9, 2020.
<https://www.phoenix.gov/newsroom/ced/1657>
- 36 Wiles, R. (2020). ASU forecast: Arizona, U.S. could be back near economic normal in 2021. *AZCentral*, December 1, 2020.
<https://www.azcentral.com/story/money/business/economy/2020/12/01/arizonas-economy-could-return-normal-2021-asu-researchers-say/6460153002/>
- 37 Bipartisan Policy Center. (2020). Child care gaps in 2019: Arizona. <https://bipartisanpolicy.org/wp-content/uploads/2020/12/Arizona.pdf>
- 38 Stone, E. (2020). "As Arizonans battle respiratory pandemic, Phoenix air quality earns poor marks." *AZCentral*, April 23, 2020.
<https://www.azcentral.com/story/news/local/arizona-environment/2020/04/23/arizona-battles-covid-19-phoenix-air-earns-bad-marks/3008574001/>
- 39 Conover, C. (2020). "Arizona's long history with voting by mail." Arizona Public Media, August 21, 2020.
<https://news.azpm.org/p/newsfeature/2020/8/21/178857-arizonas-long-history-with-voting-by-mail/>
- 40 Gallup's national survey on race relations have demonstrated that Americans nationwide are much more likely to be negative about relations between Black and White Americans than about relations among other racial groups, including White and Latino Americans. <https://news.gallup.com/poll/1687/Race-Relations.aspx>
- 41 Soergel, A. (2019). "Where most Native Americans live." *U.S. News & World Report*, November 29, 2019.
<https://www.usnews.com/news/best-states/articles/2019-11-29/california-arizona-oklahoma-where-most-native-americans-live>
- 42 Castle, L. & Polletta, M. (2020). "NAACP lawsuit targets Arizona private prisons, accuses state of practicing slavery." *AZCentral*, June 20, 2020.
<https://www.azcentral.com/story/news/local/arizona/2020/06/20/naacp-lawsuit-arizona-private-prisons-slavery/3206583001/>
- 43 Americans Immigration Council (2020). Immigrants in Arizona.
https://www.americanimmigrationcouncil.org/sites/default/files/research/immigrants_in_arizona.pdf



THE ARIZONA WE WANT

is a shared vision of success based on what matters most to Arizonans, expressing their highest aspirations and hopes for the future.

The Center for the Future of Arizona

541 E Van Buren St., Suite B-5,
Phoenix, AZ 85004

(602) 496-1360

www.arizonafuture.org

Copyright © 2021 Center for the Future of Arizona. All Rights Reserved



CENTER
FOR THE FUTURE OF
ARIZONA