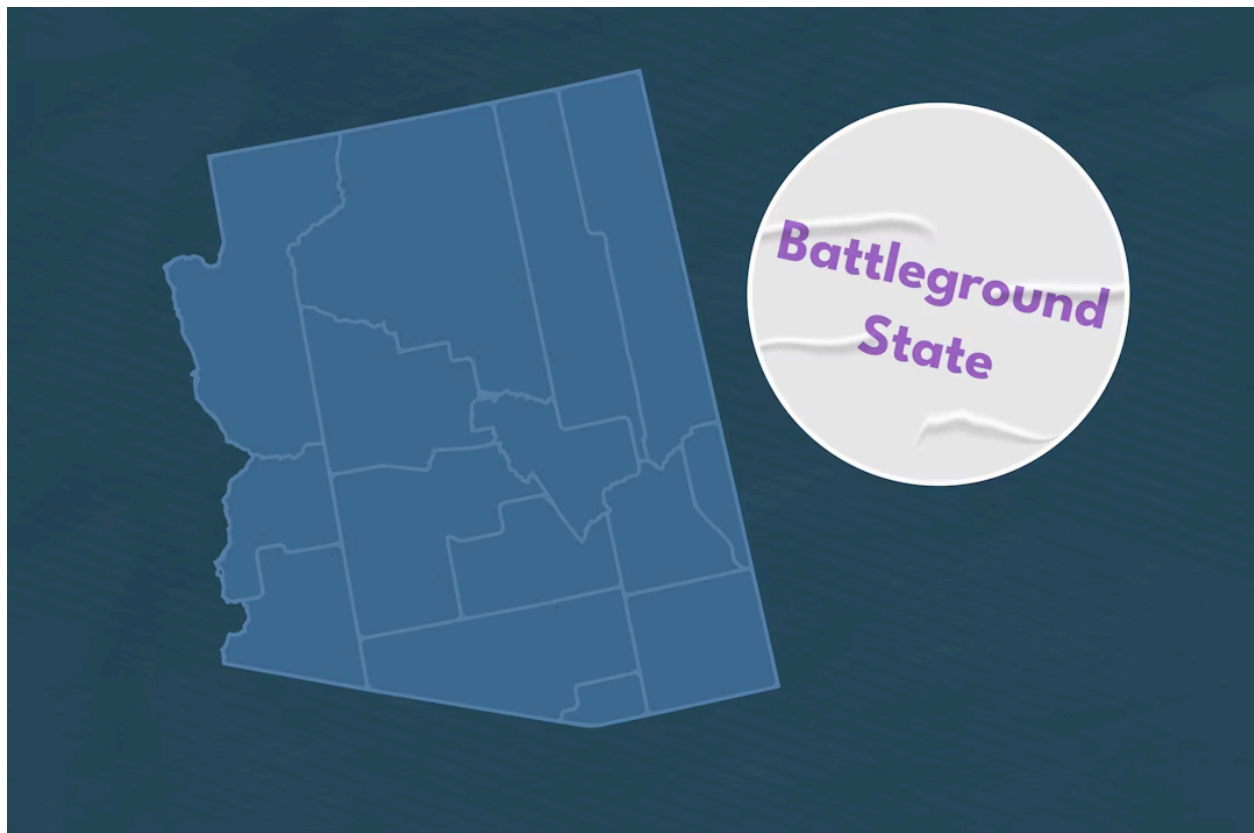


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# 2024 Battleground State Preview: Arizona



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Arizona may be the most crucial Sun Belt battleground state in 2024—with 11 vital Electoral College votes up for grabs and an open US Senate seat, Arizona is sure to be one of the highest spending battlegrounds this cycle. The Grand Canyon State was called for Biden early in the night in 2020, becoming the first Trump state that he flipped in the election. It has been a critical battleground in only one of the last six presidential elections, and it has the highest concentration of Latino voters among all the 2024 battleground states.

Below, we examine the electoral and economic trends that Arizona has seen over the last decade, of which campaigns should be readily aware heading into the 2024 election.

# Arizona: The Tossup State

In 2020, Arizona moved into the presidential tossup column for the first time in several election cycles. Here are three numbers to know:

**10,000:** Republicans have won the state in six of the last eight presidential races since 1992. But in 2020, Biden won the state by 10,000 votes (0.3%).

**\$15 million:** In 2020, Biden (+ allies) outspent Trump (+ allies) by \$15 million in ads in Arizona—the GOP’s \$58 million to the Democrats’ \$83 million. <sup>1</sup>

**31:** Former third-party voters were a crucial part of Democrats’ coalition in 2020. And in Arizona, Biden won 2016 third-party voters by a 31-point margin over Trump (58-27%). <sup>2</sup>

“Economic issues loom largest for most non-white voters; that’s a difficult dynamic for Biden across the Sun Belt because polls consistently show widespread discontent with his management of the economy, including among many Black and Latino voters...The Biden campaign points out that voters of color, especially Latinos in the southwest, often fully tune in later in the campaign.” Yet, it appears one of the top messages the presidential campaign is targeting Latino voters with “highlight[s] Trump’s comments that immigrants are ‘poisoning the blood of our country.’” <sup>3</sup>

## Arizona: The Non-College Economy

Arizona has the third highest concentration of non-college voters among all the battleground states, and understanding who they are is critical to winning the state.

- Just under two-thirds of adults over 25 don’t have a college degree. <sup>4</sup>
- Only 1-in-5 Hispanic adults have a college degree. Nearly a third of Arizona’s population identifies as Hispanic and estimates suggest Hispanic voters will represent a quarter of the electorate in November’s election. <sup>5</sup> From 2016 to 2020, Democrats saw a 5% decline in support from Hispanic voters in the state. <sup>6</sup>

- **The state is seeing a surge in apprenticeships—but more training is needed.** Over the past decade, the number of apprentices in Arizona has more than doubled—seeing one of the largest percent increases in the nation. <sup>7</sup> But there is still a shortfall in the number of skilled workers, especially those who can fill the jobs created by investments in semiconductor manufacturing. <sup>8</sup>
- **Non-college workers are the most worried about high costs.** Over 55% of non-college adults said they were very concerned about prices rising in the next two months compared to around 40% of college adults. <sup>9</sup>
- **One of the least unionized states in the nation.** Just 4% of workers in Arizona are union members, which is less than half of the national rate. <sup>10</sup> And union membership is on the decline, with 2023 numbers taking a noticeable dip from 2022. <sup>11</sup>
- **Inflation’s impacts linger.** Since the summer of 2022, the Phoenix metro area went from being one of the highest inflation hot spots to one of the lowest. While this is certainly good news, many workers are still feeling the longer-term impacts of these price shocks. Some estimates suggest that Phoenix households are now spending over \$1,000 more per month than if inflation had held steady at 2%. <sup>12</sup>
- **College workers earn 65% more than their non-college peers.** <sup>13</sup> This also means the higher cost of goods hit non-college households the hardest.

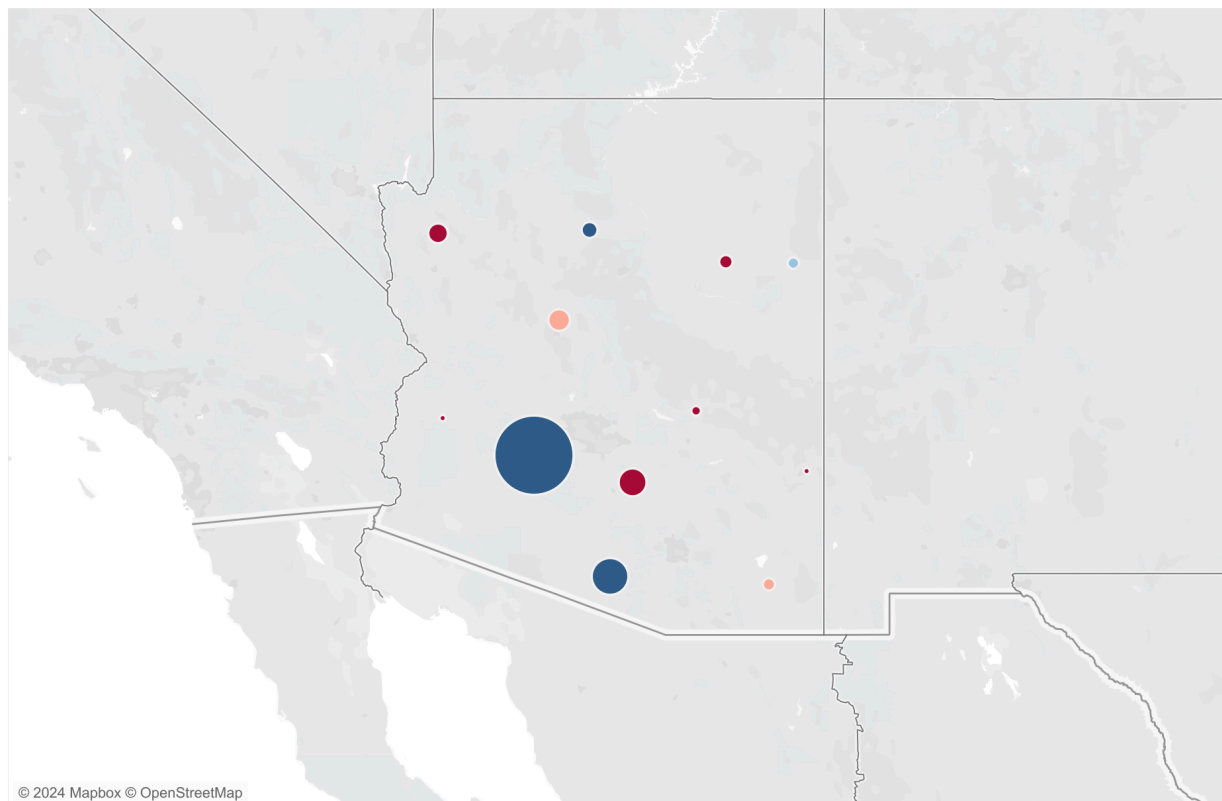
In 2024, it is likely we will see an electorate that looks very much like it did in 2020—when non-college voters made up 64% of the Arizona electorate. For Harris to carry the state, she will need to win 46% of non-college voters if his performance among college-educated voters remains steady. <sup>14</sup>

## Arizona: Geographic Challenges

Arizona’s economic and demographic trends can, in part, explain the electoral swings that have played out in counties across the state in recent election cycles.

## Arizona Presidential Election Vote Growth & Swings (2012 to 2020)

■ GOP Vote Growth & Swung Right   
 ■ GOP Vote Growth But Swung Left   
 ■ DEM Vote Growth But Swung Right  
■ DEM Vote Growth & Swung Left



**Note:** Size of bubbles represents the growth in the number of votes (D & R) from 2012 to 2020 in the presidential head-to-head. 2020 presidential margins are the head-to-head results.  
**Source:** Arizona SOS

**Democrats are seeing substantial growth in heavily college-educated metro counties.** From 2012 to 2020, there were over one million more votes cast statewide. Of those, Democrats netted 223,000 more votes than Republicans. But in the metro counties, Democrats gained 223,000 net votes over Republicans from 2012 to 2020—a 10-point swing to the left.

**Republicans have seen very marginal growth in rural, heavily non-college counties.** From 2012 to 2020, the GOP gained 4,600 net votes over Democrats in rural Arizona—a 3-point swing to the right.

**Democrats grew their share of the vote most substantially in the heavily college-educated counties.** In the three most educated metro counties (Coconino, Maricopa, and Pima), Dems saw a 12-point swing to the left and netted 273,000 votes over the GOP from 2012 to 2020.

**A leftward swing with college-educated voters and growth in the Latino electorate was key to Biden's 2020 victory.** According to Catalist, the Latino vote grew from 14% of the Arizona electorate in 2012 to 18% in 2020. Despite Biden doing six points worse with Latino voters than Obama, (Biden won 63% of Latinos, while Obama won 69%) the expansion of the Latino electorate along with a 9-point swing to the left with college-educated voters made up for the Latino vote's rightward shift.<sup>15</sup>

Whether Republicans can expand into the Latino vote and offset Democrats' college-educated gains may very well determine if the state flips red this year.

## Conclusion

Arizona is crucial for Democrats in 2024. The realignment in Sun Belt battleground states has opened a new path to victory for Harris and Democrats, but there are still substantial challenges for reconstituting the 2020 Democratic coalition. Meanwhile, without Arizona, Donald Trump's path to victory becomes severely limited. Whichever party actively competes for the college-educated vote and disaffected Latino voters will likely carry this battleground.

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