

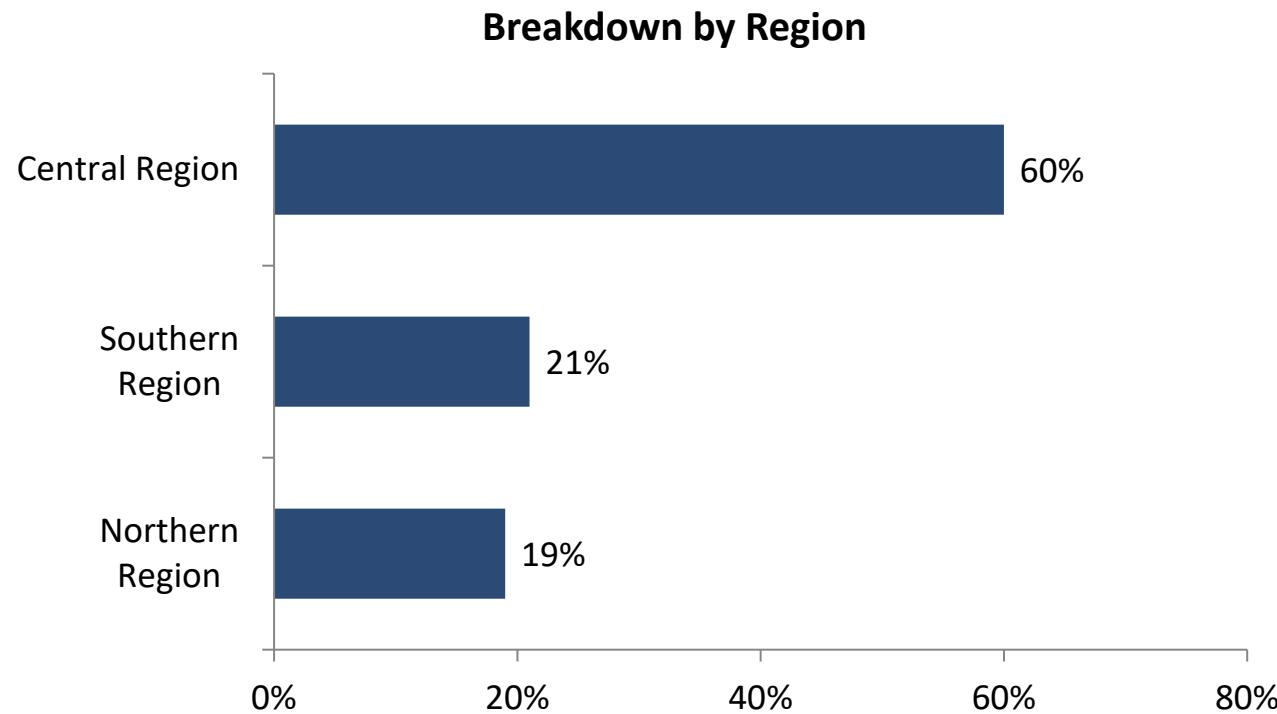


Arizona Forward Climate Change Survey 2020

July/August 2020

Overview of Responses

- Phone survey conducted with Arizona residents
- n=400 completed surveys; margin of error +/-5%



Demographic Summary

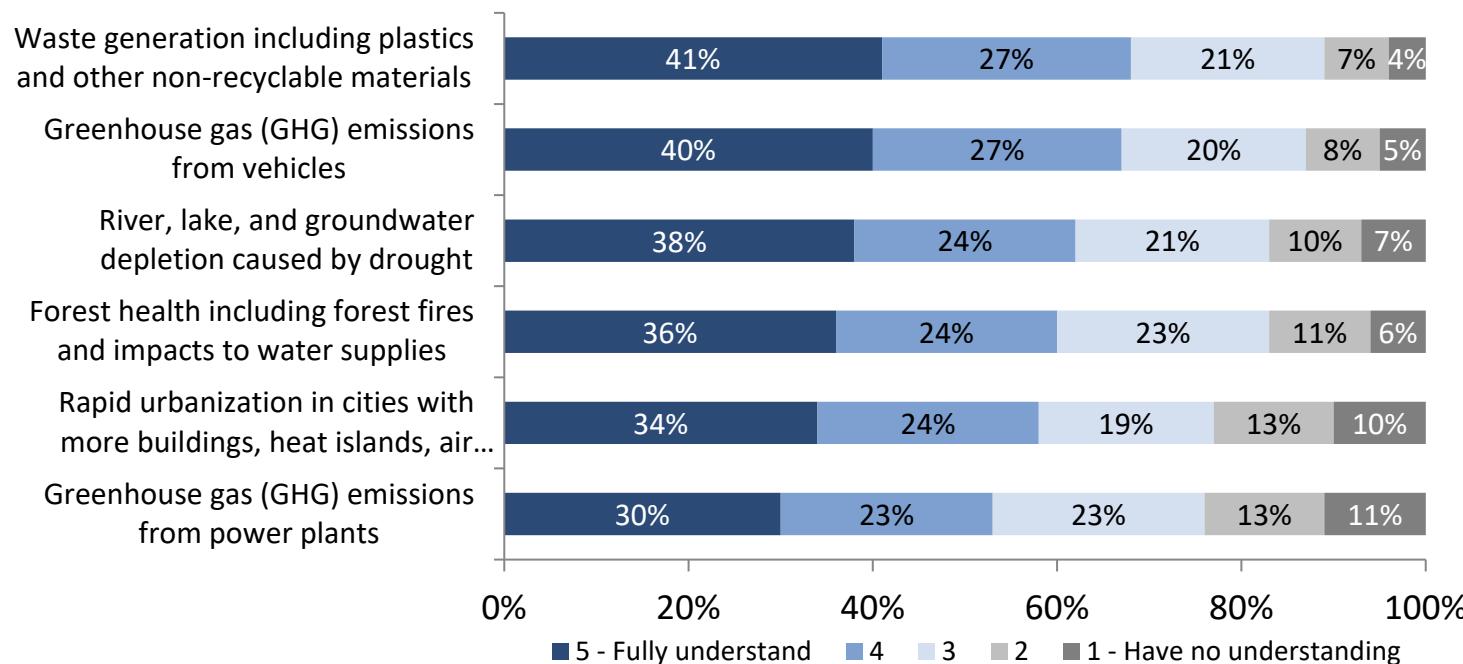
- Population representative quotas were targeted for region, gender and age.
- Just under three-quarters of respondents self-reported as being White and one-fifth reported to be Hispanic/Latino/Spanish.
- Half (49%) of respondents reported to have annual incomes less than \$80,000

Demographics	Total n=400	Demographics	Total n=400
Gender		Age	
Male	52%	18-34	28%
Female	48%	35-54	35%
Other	<1%	55 or older	37%
Ethnicity		Annual Household Income	
White	70%	Under \$40,000	20%
Hispanic / Latino / Spanish	20%	\$40,000 - \$79,999	29%
Black / African American	4%	\$80,000 - \$99,999	14%
American Indian / Eskimo	2%	Over \$100,000	29%
Asian / Pacific Islander	4%	Prefer not to answer	8%
Prefer not to answer	5%		

Understanding of Environmental Issues

When asked to indicate their level of understanding of six specific environmental issues, residents were most likely to indicate they had some understanding of *Waste generation* and *Greenhouse gas emissions from vehicles* (i.e., two thirds gave a “4” or “5 – Fully understand” rating) .

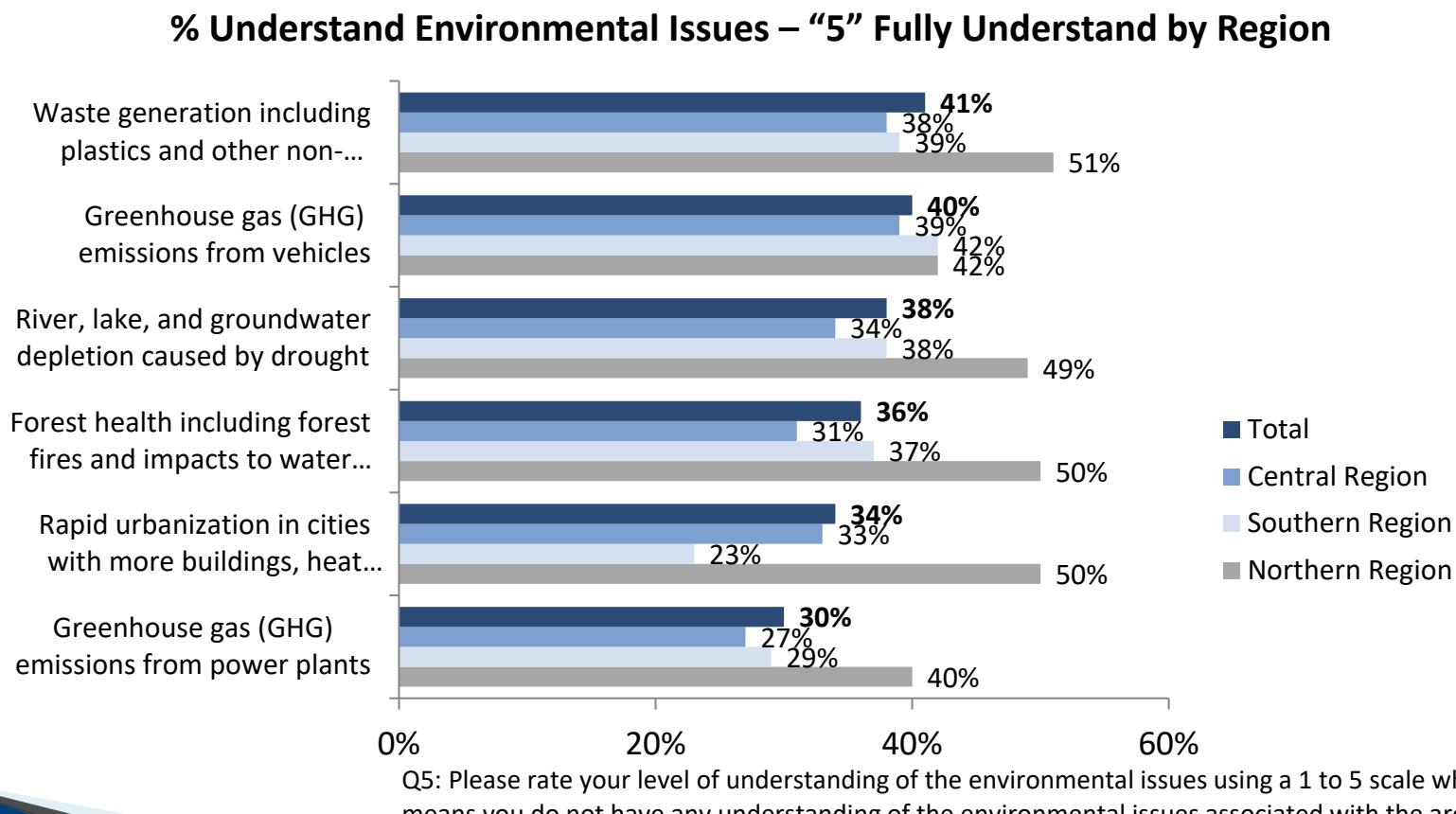
Understanding of Environmental Issues – Statewide



Q5: Please rate your level of understanding of the environmental issues using a 1 to 5 scale where “1” means you do not have any understanding of the environmental issues associated with the area of focus and a “5” means you fully understand the environmental issues for the area of focus.
n=400

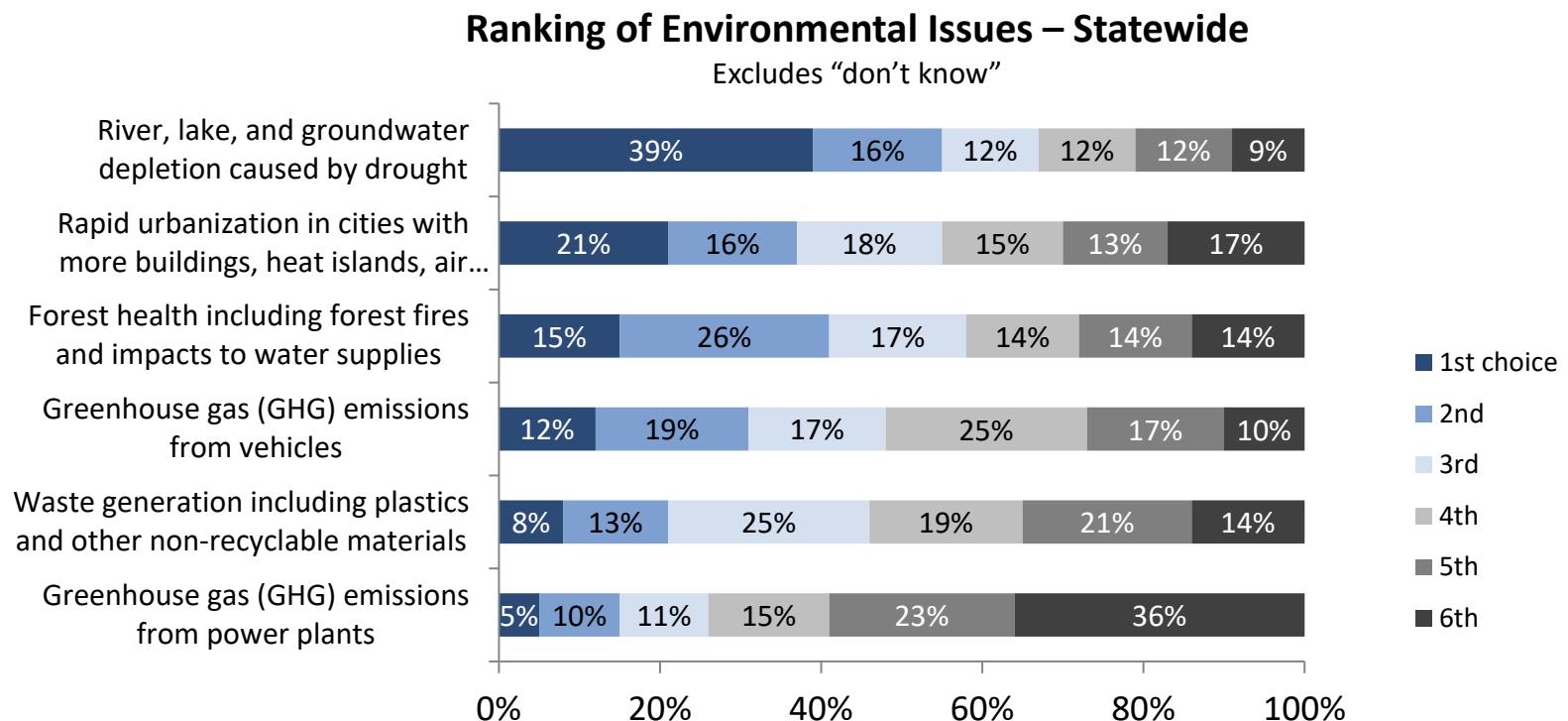
Understanding of Environmental Issues

- Residents living in the Northern Region are much more likely to say they “fully understand” all environmental issues compared to residents in the other two regions excluding Greenhouse gas emissions from vehicles; but the difference was most apparent for the issue of *Forest health*.
- Those in the Southern Region were less likely to report understanding the issues related to *Rapid urbanization in cities* compared to residents in the Central and Northern Regions.



Ranked Environmental Issues

When asked to rank the six issues according to the priority they believe each issue should be for the state, Arizona residents were mostly likely to rank *River, lake, and groundwater depletion* as the issue that should be the top priority (39%). More than half (55%) of residents ranked this as the first or second priority.



Q6: Now, please rank these six environmental issues impacting climate change in order in terms of the priority each should be for the state of Arizona.

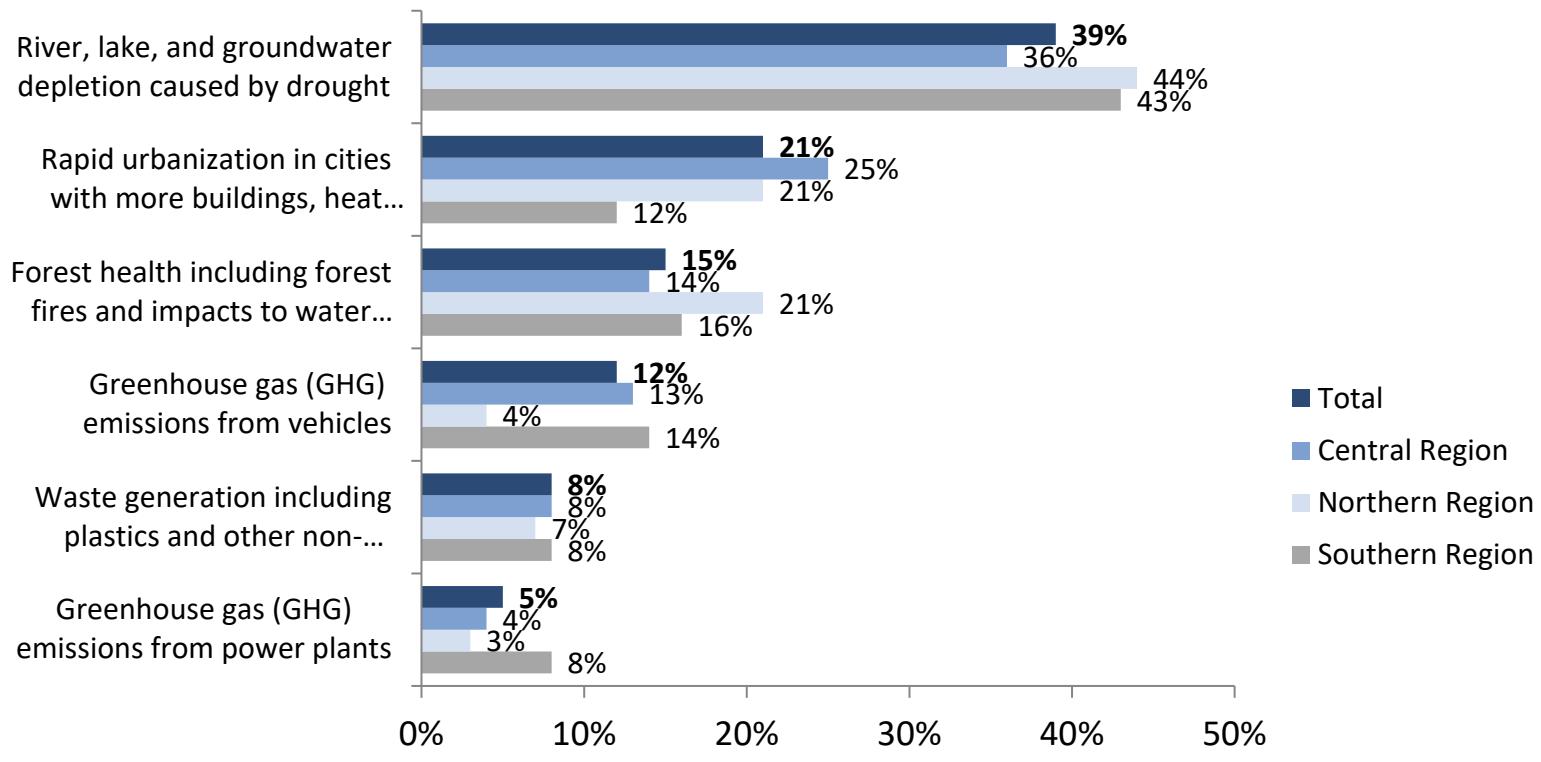
n=372

Ranked Environmental Issues

- Residents in the Northern Region are significantly less likely to rank *Greenhouse gas emissions from vehicles* as a top priority for the state compared to residents in the other two regions (4% vs. 13% and 14%).
- Rapid urbanization is less likely to be ranked a top priority by residents in Southern Arizona.

Ranked Environmental Issues – Top Priority by Region

Excludes “don’t know”

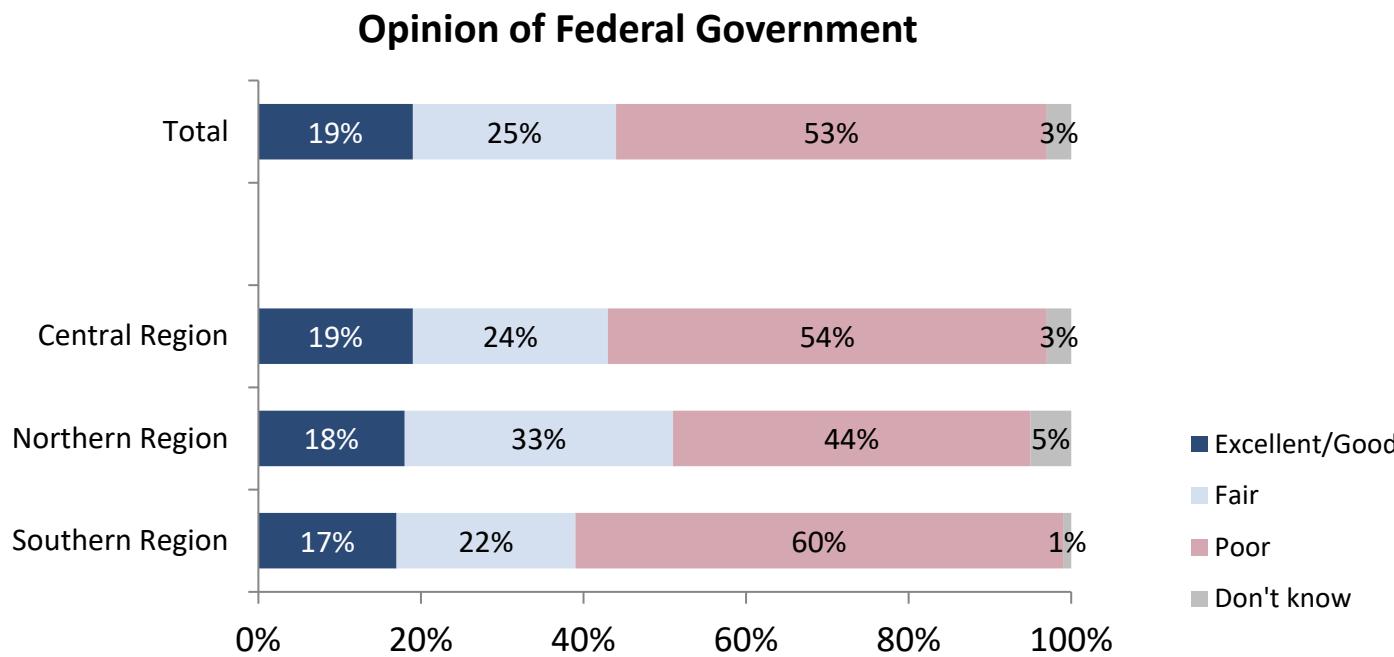


Q6: Now, please rank these six environmental issues impacting climate change in order in terms of the priority each should be for the state of Arizona.

n=372

Opinion of Federal Government Addressing Environmental Issues

- More than half of residents overall (53%) indicated they believe the Federal government is doing a *poor* job in addressing environmental issues related to climate change.
- While *excellent/good* ratings are similar across the three regions, slightly fewer residents in the Northern Region indicate the Federal government is doing a *poor* job and instead indicated it is doing a *fair* job with issues related to climate change.

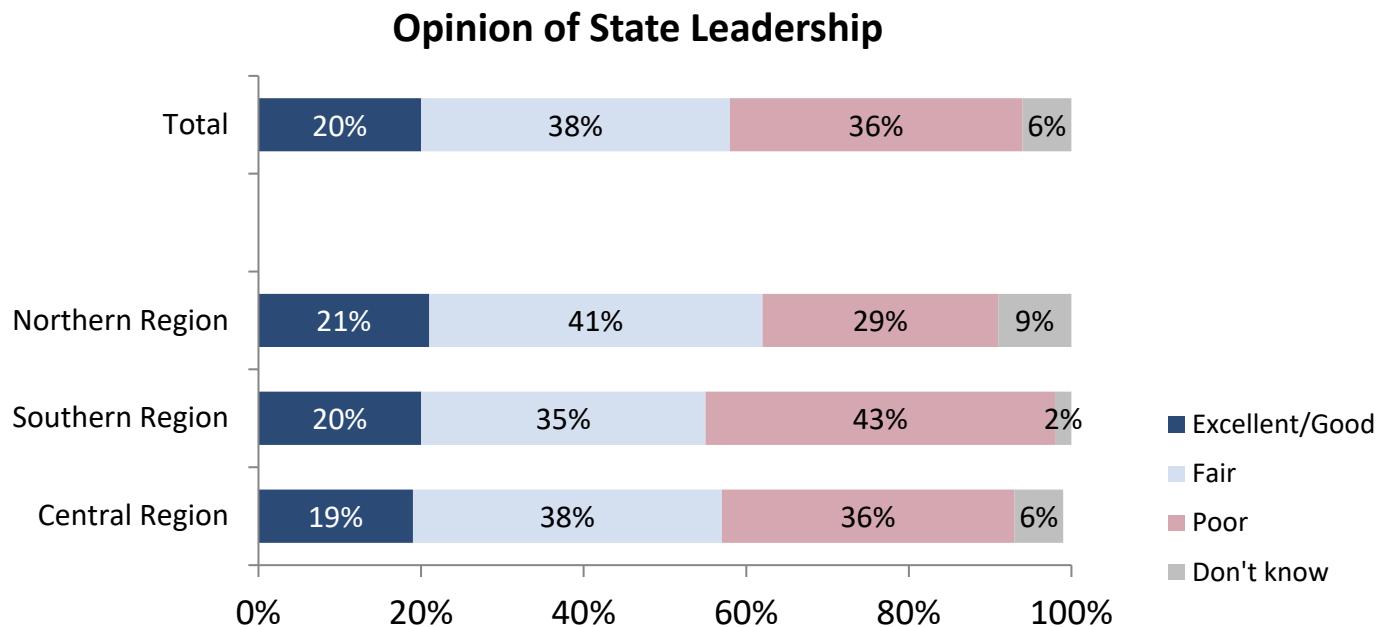


Q6b: To the best of your knowledge, would you say the Federal government is doing an excellent, good, fair or poor job in addressing environmental issues related to climate change?

n=400

Opinion of State Leadership Addressing Environmental Issues

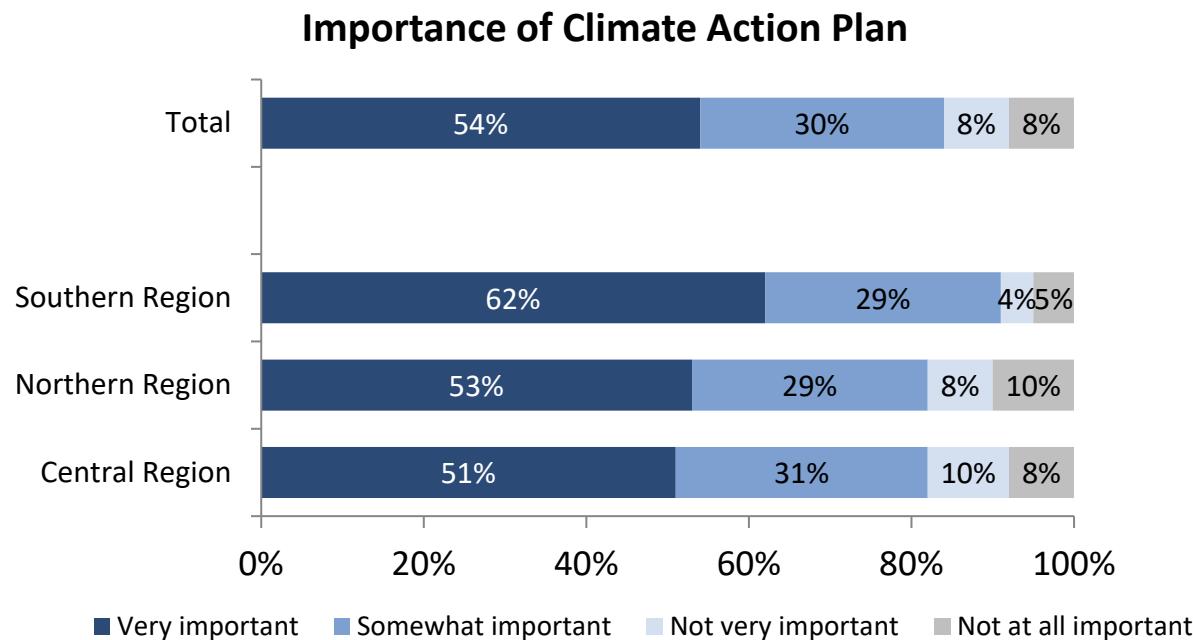
- The largest portion of Arizona residents (38%) indicated they believe the state leadership in Arizona is doing a *fair* job in addressing environmental issues related to climate change and a similar proportion (36%) believe the state is doing a *poor* job.
- Again, Northern residents are slightly less likely to give a *poor* rating compared to residents in the other two regions (43% vs. 29% and 36%).



Q7: To the best of your knowledge, would you say the state leadership in Arizona is doing an excellent, good, fair or poor job in addressing environmental issues related to climate change?
n=400

Importance of Statewide Climate Action Plan

- Slightly more than half of Arizona residents (54%) feel it is “very important” that Arizona has a statewide Climate Action Plan to address the impact of climate change. Another one-third (30%) say it is “somewhat important,” making the total importance rating 84% among all residents.
- Residents living in the Southern Region are more likely to rate a Climate Action plan as at least “somewhat important” compared to those in the Northern and Central Regions (91% vs. 82%).

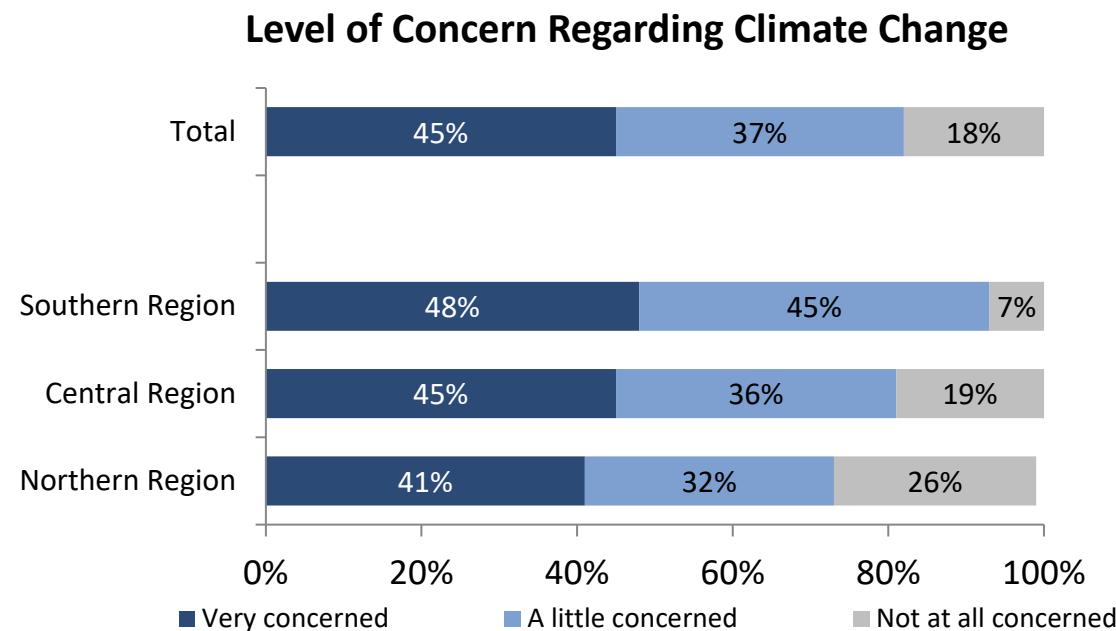


Q8: How important is it to you that that Arizona has a statewide Climate Action Plan to address the impact of climate change in the state?

n=400

Level of Concern Regarding Climate Change

- Just under one-half of residents (45%) described themselves as “very concerned” regarding climate change in Arizona. Roughly one-third reported being “a little concerned” while one-fifth would say they are “not at all concerned” with climate change.
- Residents in the Southern Region are much more likely to be either “very” or “a little” concerned with climate change in Arizona compared to residents in the other two regions (93% vs. 81% and 73%).



Q9: Overall, how would you describe your level of concern regarding climate change in Arizona? Would you say you are very concerned, a little concerned, or not at all concerned?
n=400

Reason for Being “Very Concerned” About Climate Change

The top reasons people are “very concerned” regarding climate change are seeing the effects on the environment (33%), their perception that there are droughts and less monsoon rain (29%), seeing too much growth in the state (15%) and feeling that the government is not doing enough to work against climate change (15%).

Those who are “very concerned” (n=179)

I see the effects of climate change//changes in the environment//climate is irregular//temperatures are rising	33%
Not enough water//too many droughts//less monsoon rain//depleted water supply (general)	29%
Too much growth//urban expansion//populations is growing//overpopulation	15%
Government needs to do more about climate change//more regulations//mandates//politicians are doing nothing//no leadership	15%
Poor air quality//concerned about air quality//factories emitting pollution//greenhouse gasses	13%
Too many wildfires//climate change causes more fires//concerned about forest habitat//need better forest management	12%
Worried about future generations//my child's generation	12%
I feel we could do more to battle climate change//we should have a better plan of action (general)	11%
Recycling is a concern//we need to do more recycling//I see less recycling	6%
Natural resources are important to protect//need to conserve natural resources//we are losing natural resources	4%
Arizona needs to use alternative power//renewables//better tax credits for renewable energy//environmental incentives//solar	4%

Q9b: Please explain the reason for your level of concern.
Responses less than 4% not mentioned

Reason for Being “A Little” or “Not At All Concerned”

- The top reasons people are “a little” or “not at all concerned” regarding climate change are primarily because they don’t believe there is climate change problem (20%) or they feel there are bigger issues to be concerned with (16%).

Those who are “a little” or “not at all concerned” (n=220)

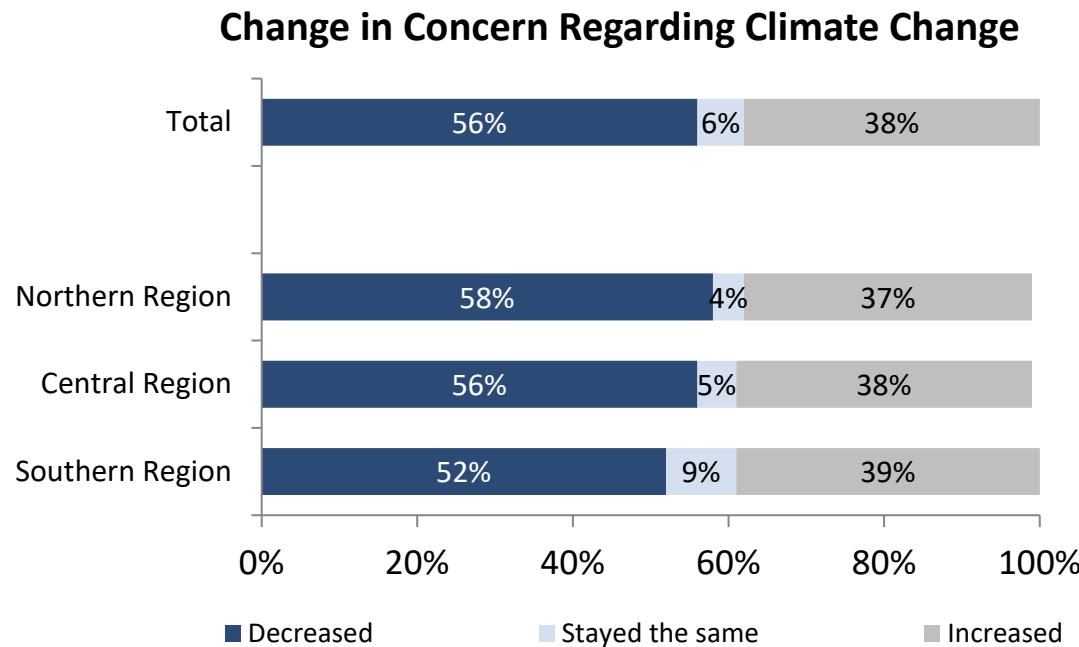
There is no climate change//global warming//it's a natural cycle of cooling and warming//natural pattern	20%
Not concerned//no reason to be concerned//there are bigger issues to be concerned about	16%
I see the effects of climate change//changes in the environment//climate is irregular//temperatures are rising	11%
Not enough water//too many droughts//less monsoon rain//depleted water supply (general)	10%
Poor air quality//concerned about air quality//factories emitting pollution//greenhouse gasses	8%
Government needs to do more about climate change//more regulations//mandates//politicians are doing nothing//no leadership	7%
There is nothing we can do about climate change//there is nothing I can do	7%
Too much growth//urban expansion//populations is growing//overpopulation	6%
Too many wildfires//climate change causes more fires//concerned about forest habitat//need better forest management	6%
I feel we could do more to battle climate change//we should have a better plan of action (general)	6%
Global warming is political//the green new deal is political power tool//too much political money involved in climate change	5%
I don't see any changes in the environment around me//environment is the same around here	5%
Worried about future generations//my child's generation	5%
Jobs are a bigger concern to me//worried about the economy being shut down	3%
Other countries have a bigger carbon footprint//manufacturing in other countries create more pollution//other nations should be held under the same standard	3%

Q9b: Please explain the reason for your level of concern.

Responses less than 3% not mentioned

Change in Level of Concern Regarding Climate Change

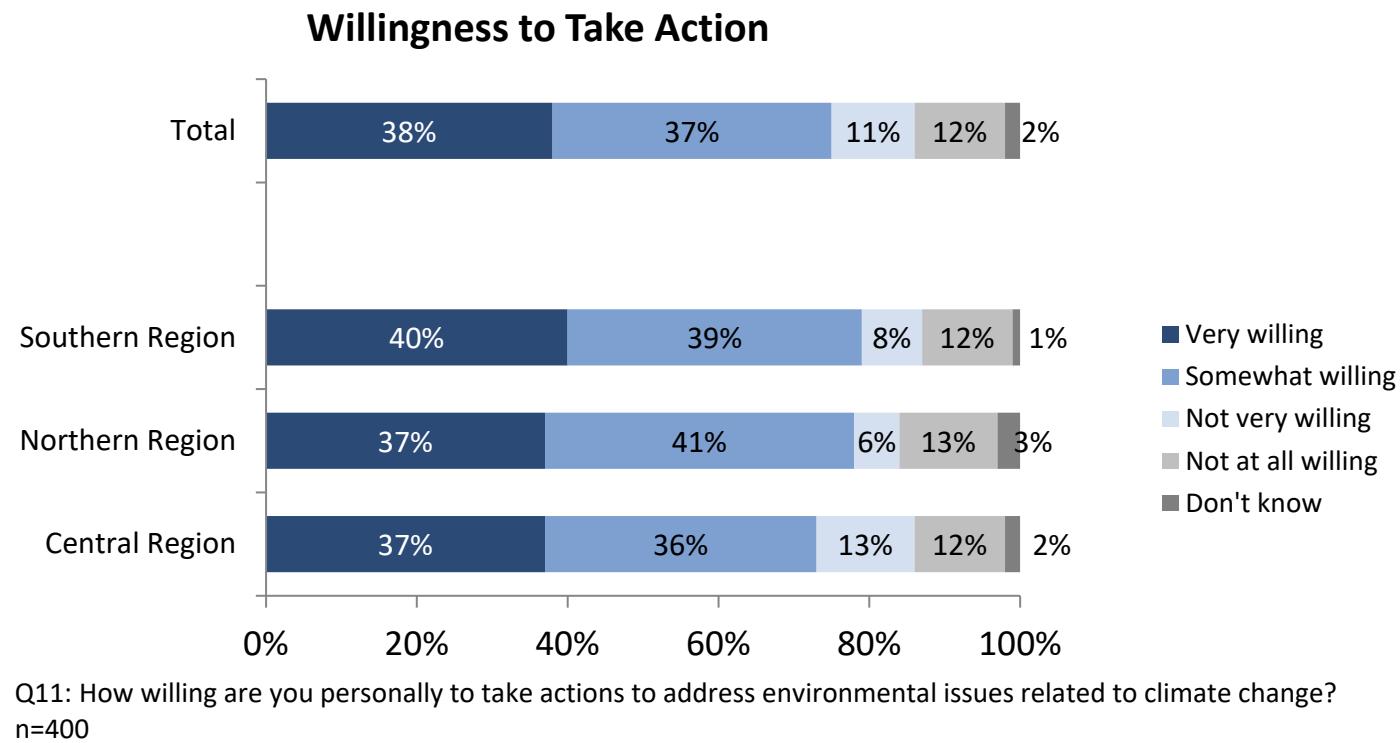
More than half of Arizona residents reported their concern over climate change has decreased over the past 12 months (56%). Nearly two in five reported their level of concern has increased (38%).



Q10: Would you say your level of concern about the impact of climate change in Arizona has increased, decreased, or stayed the same over the past 12 months?
n=400

Willingness to Take Action to Address Environmental Issues

- An equal portion of residents are “very” and “somewhat willing” to personally take action to address environmental issues related to climate change. Combined, 75% of Arizona residents indicated they are willing to take action.
- There were not any differences by region, however, younger residents are significantly more likely to be willing (very/somewhat) to take action than older residents (83% <55 vs. 62% 55+).

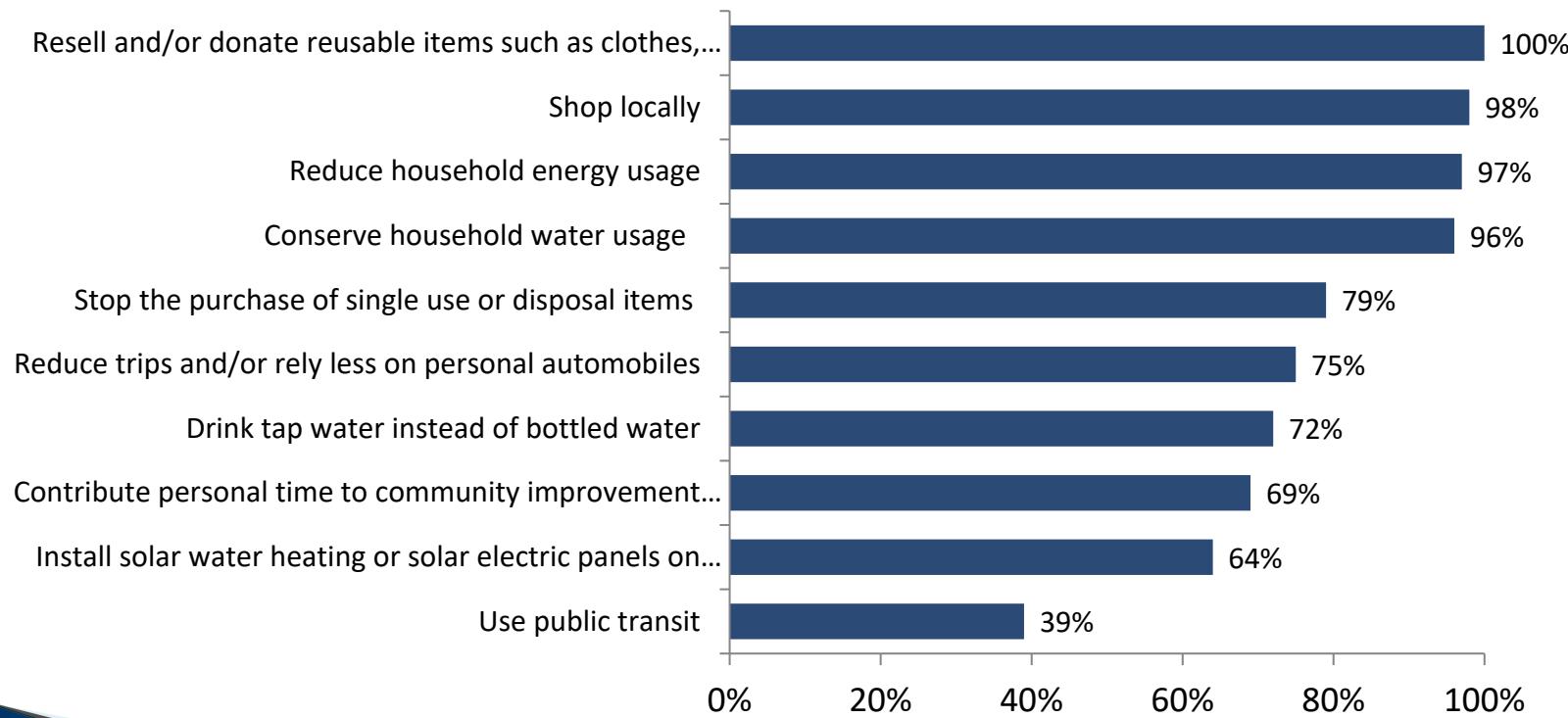


Willingness to Take Action to Address Environmental Issues

- All residents who reported being “very” or “somewhat willing” to take action to address climate change reported they have or will *resell and/or donate reusable items such as clothes and furniture*.
- Another strong majority reported they have or will *shop locally* (98%), *reduce household energy usage* (97%), or *conserve household water usage* (96%).
- Only four in ten reported they will use public transit to help impact climate change.

Actions Willing to Take to Impact Climate Change

Among those “very” or “somewhat” willing



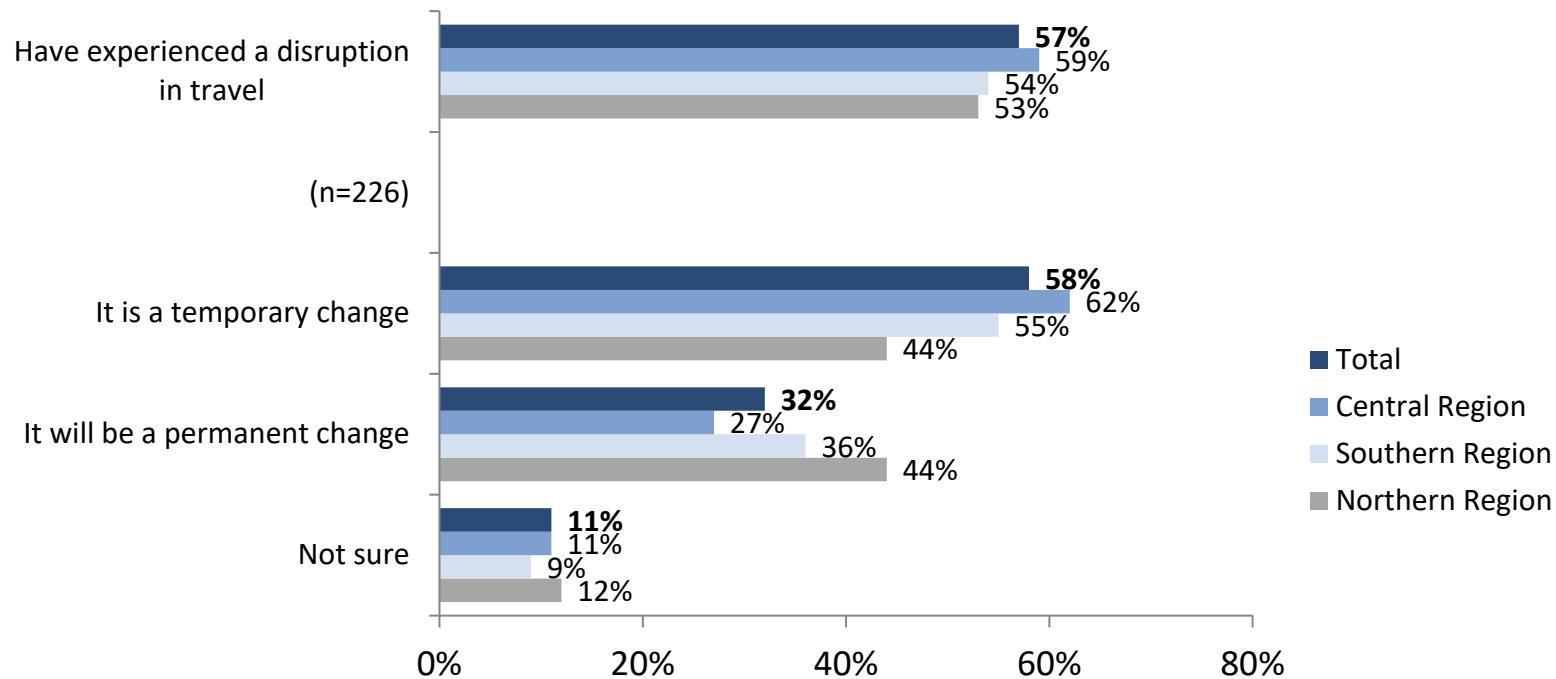
Q12: IF VERY OR SOMEWHAT WILLING: What actions have you taken, or will you take to help impact climate change? Will you...?

n=300

Disruptions in Travel Due to COVID-19

- A little more than one-half of residents (57%) reported experiencing a disruption in vehicle travel since the start of the COVID-19 Pandemic.
- Interestingly, residents in the Central Region are much more likely than those in the Northern Region to believe it is a temporary change (62% vs. 44%) while Northern residents are more likely to believe it will be a permanent change.

Travel Disruptions Due to COVID-19



Q13: Since the start of the Covid-19 pandemic, have you experienced a disruption in the amount of vehicle travel you are doing and/or the transportation modes that you are using to travel around your city?

Q13b: Do you think this change is likely to be temporary, just until the pandemic is under control, or will it be a lasting, more permanent change? Total n=400

Travel Changes

- Residents who reported experiencing a disruption in travel, were most likely to cite they were using their car less (32%), decreasing the amount of travel overall (30%), working from home (28%), and staying home more with kids (25%).
- Central Region residents were slightly more likely than residents in the other two regions to report a general decrease in travel and were much more likely than Northern residents to report working from home.

Those who have experienced a disruption in travel (n=226)

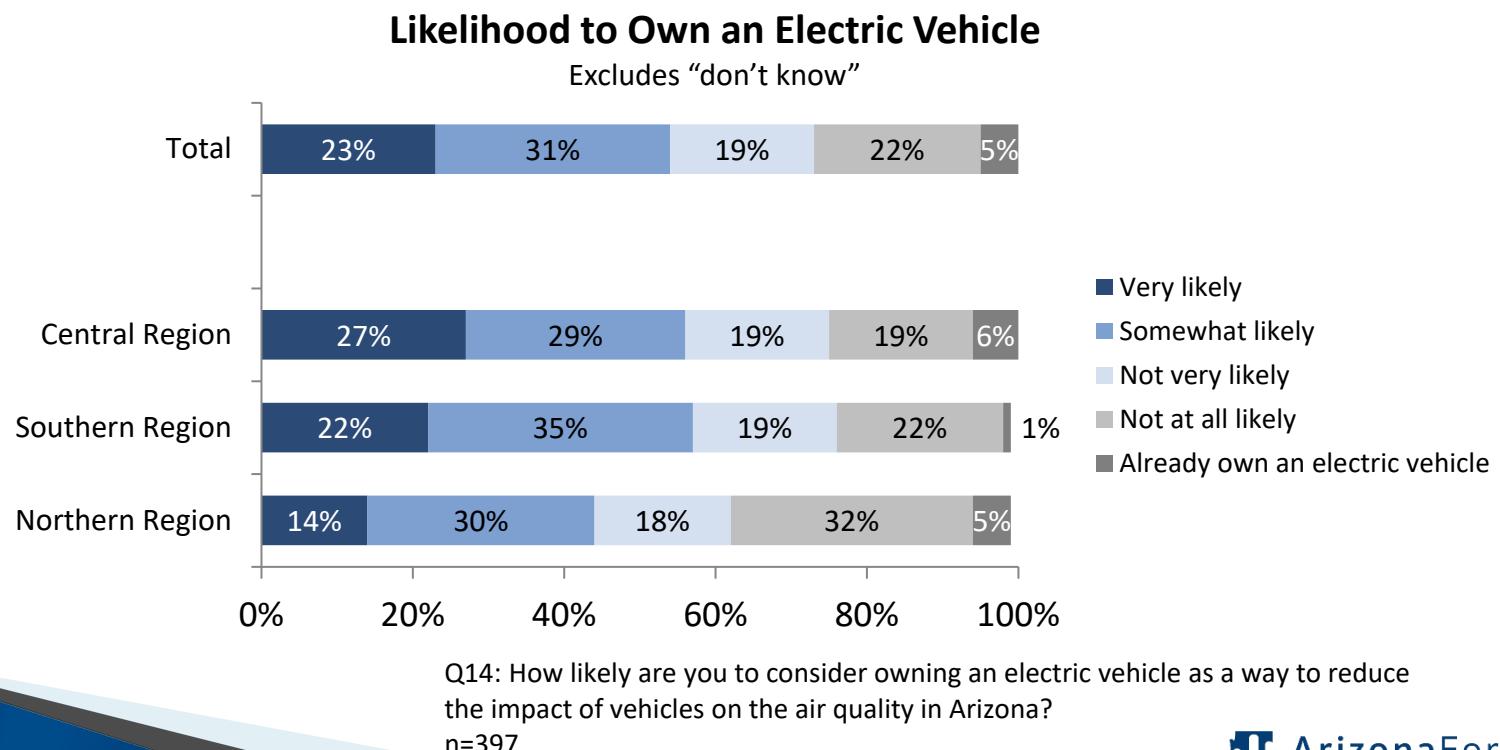
We drive//use car less	32%
There is a decrease in the amount of travel I/we do	30%
Working from home//telecommute more	28%
We stay home more//kids are home more//we don't go out much	25%
I only use the car to go to the grocery store//pickup groceries	11%
We isolated ourselves//quarantine ourselves//stay at home order	7%
We no longer go on vacations//long trips	7%
I am unemployed//not working anymore//I'm on furlough	6%
A lot of stores/restaurants//entertainment places are closed due, to the pandemic	6%
No longer using public transportation	6%
Nothing has been affected//still travel same amount as before pandemic//I'm an essential worker	4%
There is less traffic//traffic has reduced since pandemic	4%

Q13a: Please tell me what has changed in either the amount of travel or the transportation mode(s) you are using or not using because of the pandemic.

Responses less than 4% not mentioned

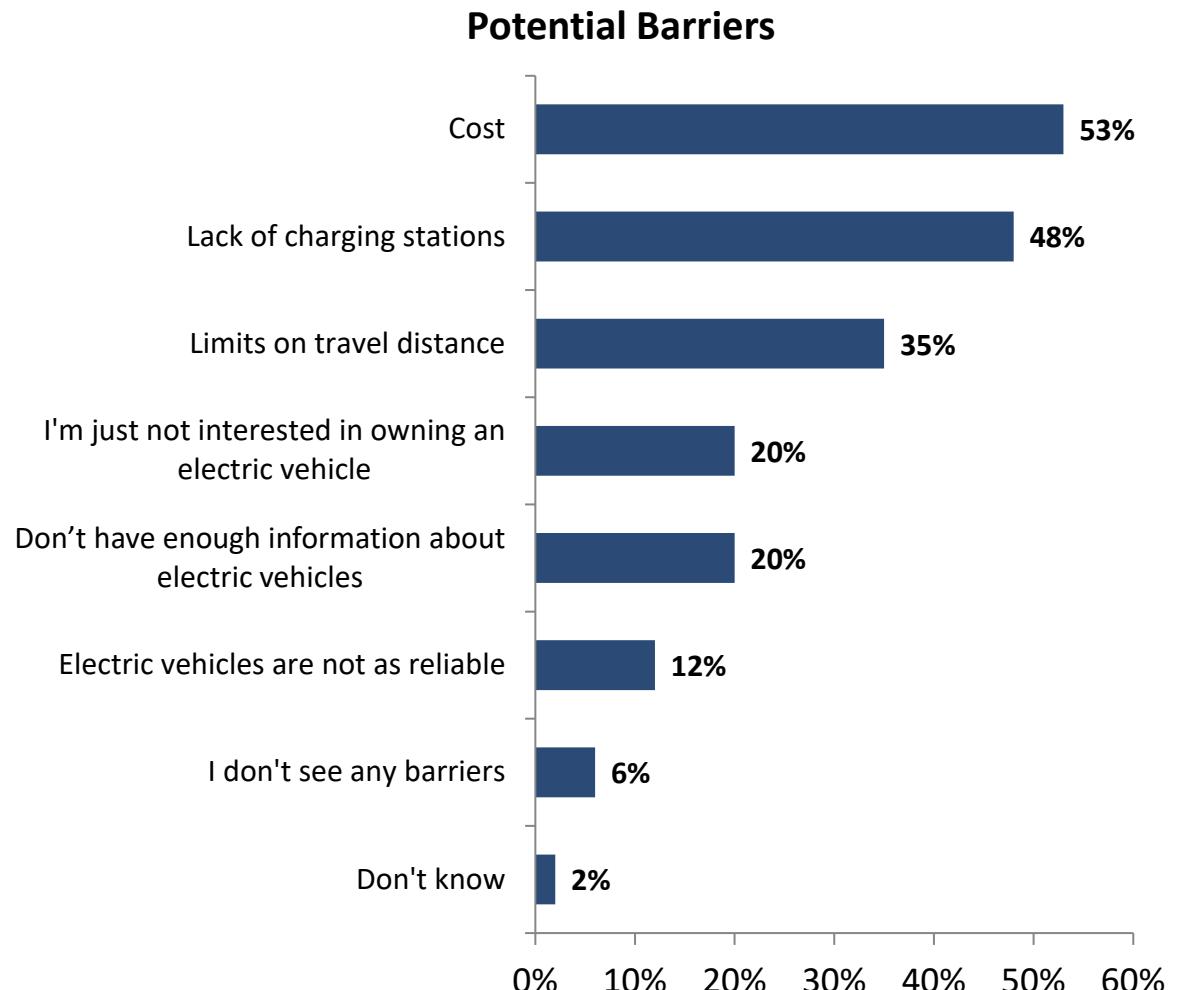
Likelihood to Own an Electric Vehicle

- Approximately one-half of residents (54%) were “very” or “somewhat likely” to consider owning an electric vehicle as a way to reduce the impact of vehicles on air quality in Arizona and 5% reported already owning an electric vehicle.
- Significantly more residents in the Central Region reported to be “very likely” to consider owning an electric vehicle compared to Northern residents (27% vs. 14%) and are more likely to already own an electric vehicle compared to Southern Region residents (6% vs. 1%).
- Younger residents are significantly more likely to report being very/somewhat likely to own an electric vehicle compared to those 35 and older (67% vs. 49% 35+).



Potential Barriers to Purchasing an Electric Vehicle

- The top reported barriers to purchasing an electric vehicle cited by residents were *cost* (53%), *lack of charging stations* (48%) and *limits on travel distance* (35%).
- Younger residents were significantly more likely to report *cost* as a barrier compared to older residents (61% vs. 40% 55+), while older residents were much more likely to report not being interested in owning an electric vehicle at all (24% vs. 11% <35).
- There were no significant differences between regions.

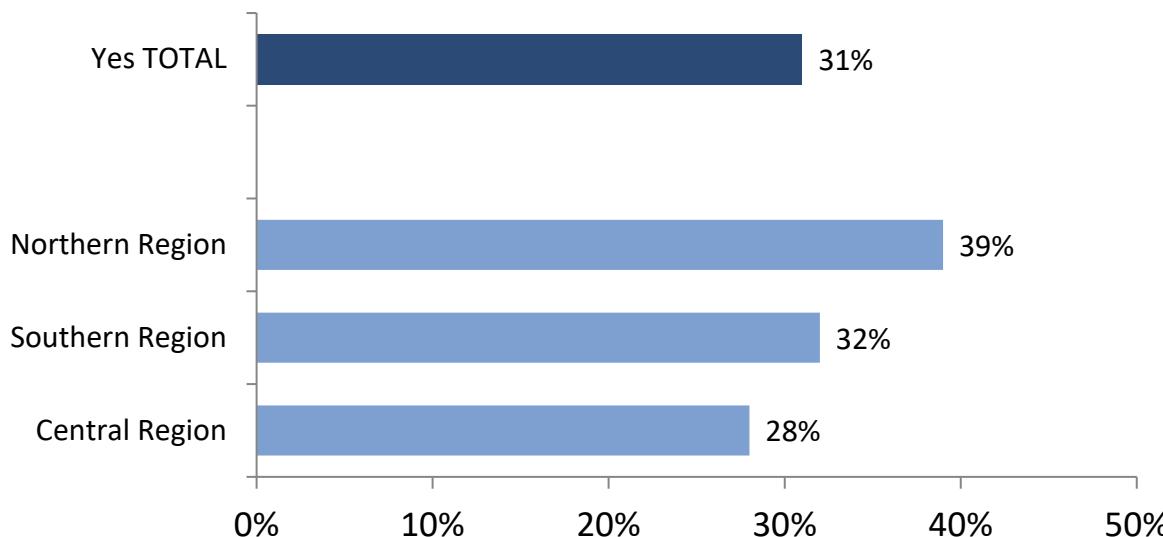


Q15: Please tell me if you think any of the following are potential barriers that will keep you or others from purchasing an electric vehicle.
Total n=400

Aware of Actions to Ensure Water Supply in Arizona

- Slightly less than one-third of residents reported they were aware of actions that are being taken by state and local leaders to ensure Arizona has a robust water supply in the future.
- Significantly more residents in the Central Region reported NOT being aware of any actions compared to Northern residents (69% vs. 55% not aware).

Aware of Actions by State and Local Leaders



Q16: Are you aware of any actions that are being taken by state and local leaders to ensure Arizona has a robust water supply into the future?

n=400

For more information contact

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