

# ARIZONA AFFORDABILITY & RENEWABLE ENERGY SURVEY

***Measuring baseline attitudes that shape views towards renewable energy development in Arizona***

***December 2025***



Environmental  
Defense  
Fund



270 STRATEGIES







Environmental Defense Fund partnered with 270 Strategies and Lincoln Room Strategies to conduct a statewide survey of registered voters in Arizona this fall to explore perceptions of key affordability and energy issues facing the state.

The research centered on preferences on renewable energy sources, opinions on the development of wind and solar energy within Arizona, concerns about the cost of living with regard to electricity and energy prices, and sentiment on legislative and regulatory restrictions against wind development.

The survey found that Arizonans are deeply concerned about affordability, don't want the government restricting their ability to lease land for solar and wind, and are broadly supportive of investing in renewable energy and believe it will bring down utility costs overall.



# SURVEY DESIGN

**Mode:** Online and text-to-web

**Universe:** Arizona registered voters

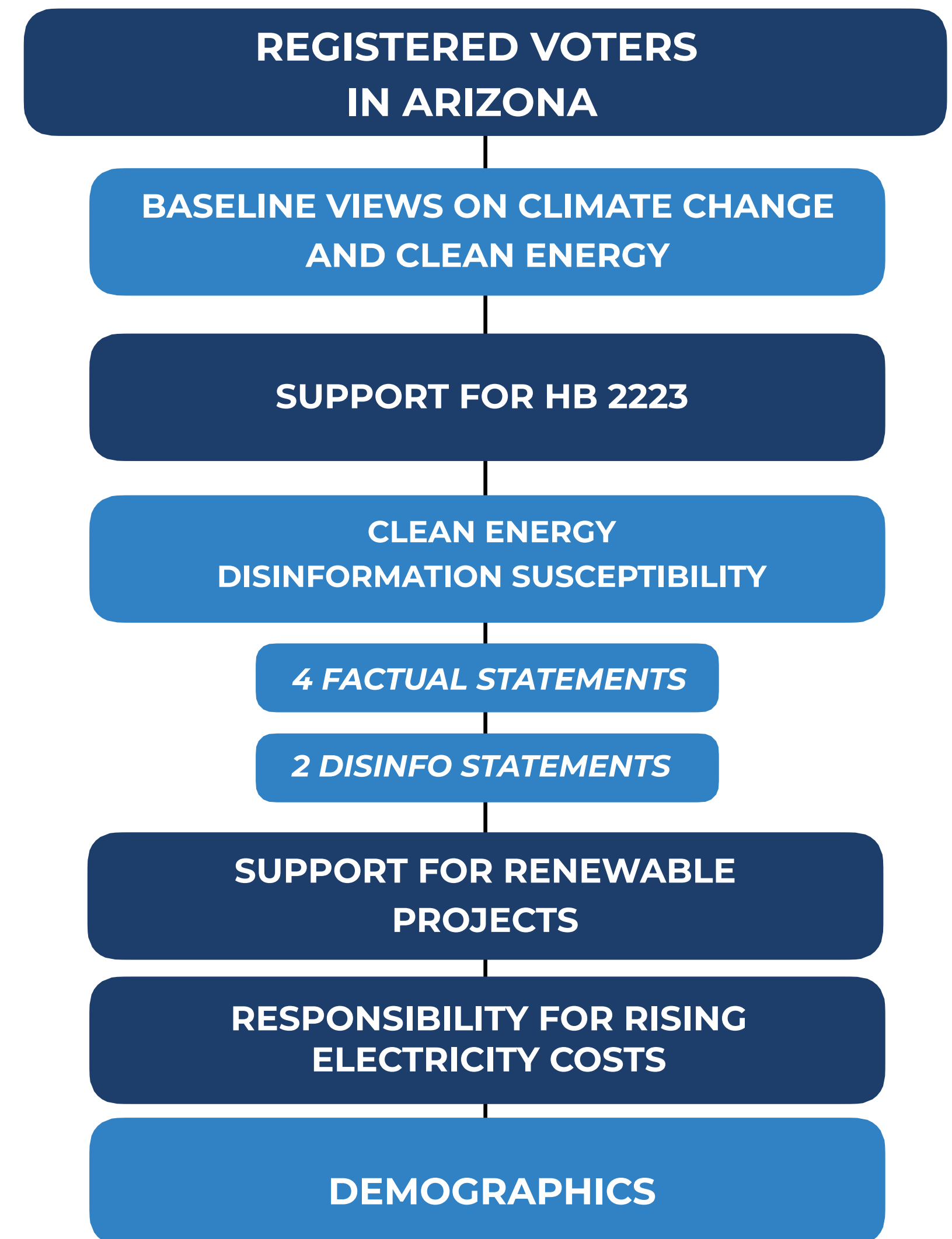
**Sample Size:** Representative statewide sample of 1,525 registered voters

**Margin of Error:** +/- 3.4pp

**Fielding Period:** October 30 - November 5, 2025

**Key Metrics:** Baseline views on renewable energy, attitudes on the development of wind and solar energy within Arizona, the cost of living with regard to electricity and energy prices, support for the proposed measure HB 2223, responsibility for rising electricity costs.

*Some figures throughout the report have been rounded up or down for readability*



# KEY TAKEAWAYS

## → **AFFORDABILITY IS TOP OF MIND FOR ARIZONANS**

- ◆ 79% of respondents reported that the economy and jobs, cost of living, and housing costs are top issues for the Arizona state government to address.
- ◆ Arizonans are especially concerned about the price of food and groceries (68%), rent or property taxes (33%), healthcare (30%), and the cost of electricity (23%).
- ◆ Arizonans overwhelmingly hold electric utility companies responsible for rising electricity costs, followed by the oil and gas industry and the construction of data centers.

## → **ARIZONANS OVERWHELMINGLY SUPPORT PRIVATE PROPERTY RIGHTS**

- ◆ Arizonans strongly support private property rights (89%).
- ◆ They are in strong agreement that landowners should be able to choose whether they lease their land to solar and wind projects (76%), including majorities across parties.

# KEY TAKEAWAYS

## → ARIZONANS SUPPORT BUILDING MORE WIND AND SOLAR

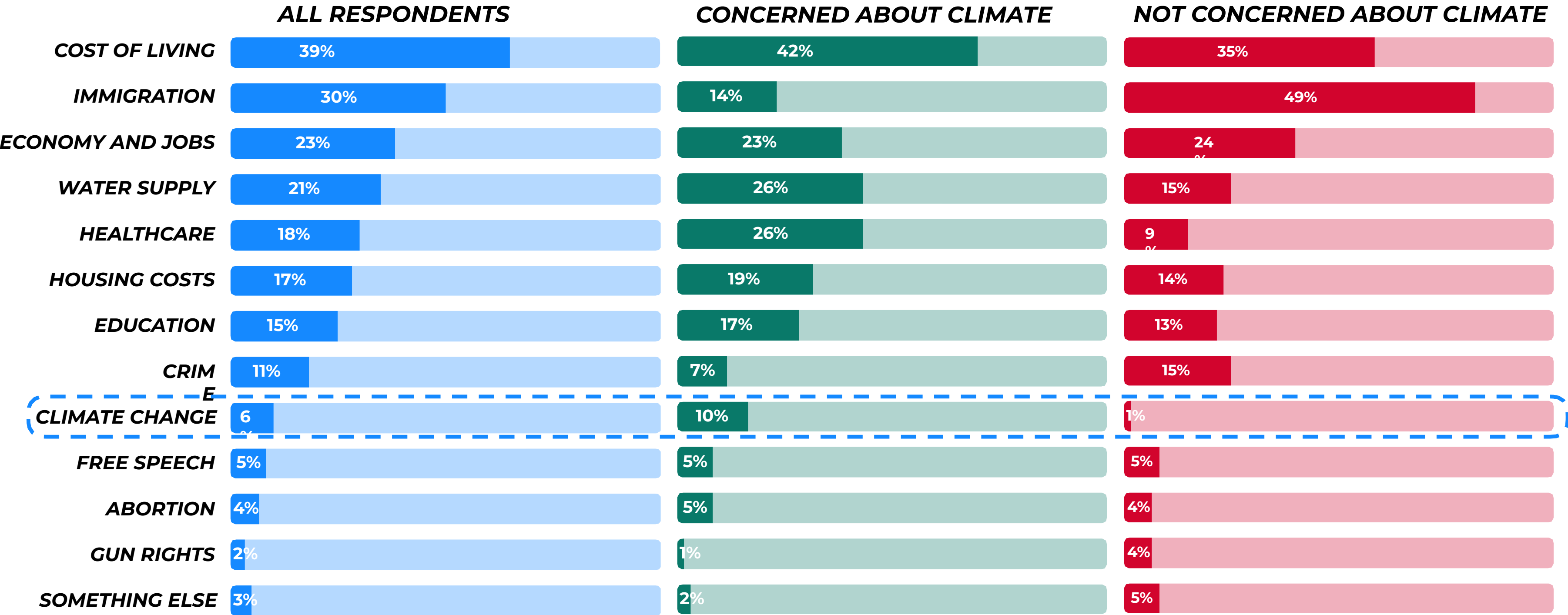
- ◆ Arizonans are concerned about extreme weather (54% very / somewhat concerned) and feel that the state is investing too little into renewable energy projects (43% vs 18% too much vs 15% just enough).
- ◆ Nearly two-thirds support building more wind turbines & solar energy in Arizona (64%), including strong support from Hispanic/Latino voters (77%) and Independents (70%).
- ◆ Arizonans believe that adding more red tape and restrictions to clean energy will discourage economic development and cost more in the long run, with 73% of respondents agreeing that “when lawmakers focus on red tape and over-regulation, Arizonans pay the price in higher utility bills.”

## → ARIZONANS BELIEVE IN THE BENEFITS OF RENEWABLES, BUT DISINFO IS STILL IMPACTFUL

- ◆ The majority of Arizonans find messaging on the benefits of renewable energy projects to be believable – including 65% who believe bringing renewable energy sources to the grid will make electricity more reliable and 59% who believe that building renewable energy projects will bring down the costs of utilities and help update schools.
- ◆ A majority are also susceptible to disinformation that wind and solar projects will “negatively impact many of Arizona’s wildlife species” (57%) and 50% prefer preserving rural character over reducing restrictions on renewable energy (41%).

# THE ECONOMY AND AFFORDABILITY ARE TOP PRIORITIES FOR ARIZONANS, INCLUDING THOSE THAT ARE VERY CONCERNED ABOUT CLIMATE CHANGE

## CONCERN ABOUT CLIMATE CHANGE



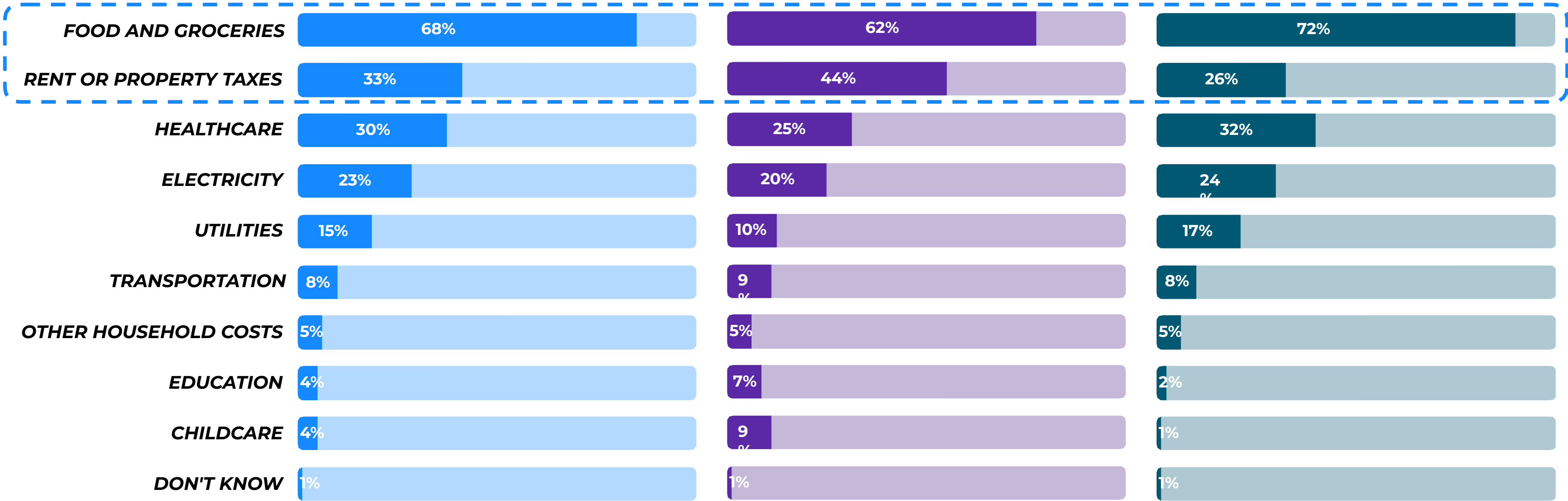
# FOOD AND GROCERIES ARE THE MOST CONCERNING EVERYDAY COSTS, FOLLOWED CLOSELY BY THE COST OF HEALTHCARE, ELECTRICITY, AND OTHER UTILITY BILLS

## MOST CONCERNING COSTS BY AGE

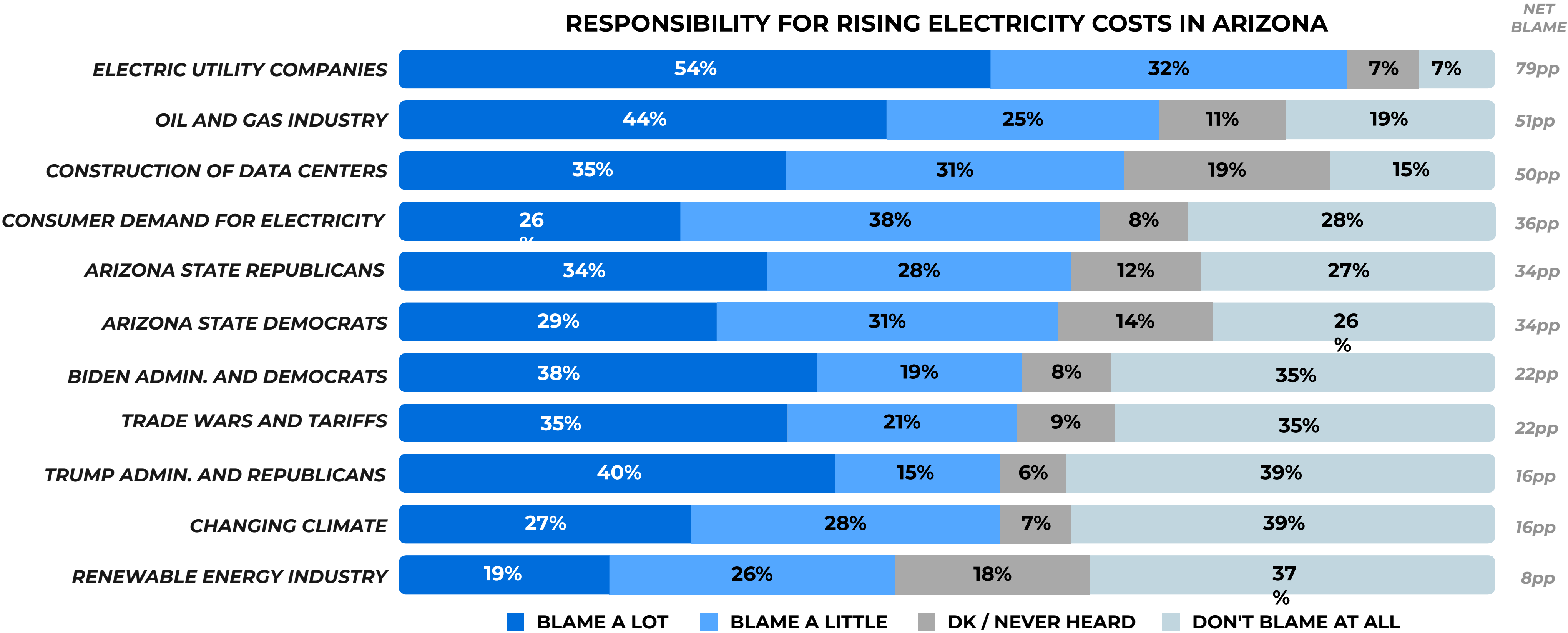
### ALL RESPONDENTS

### UNDER 40

### OVER 40

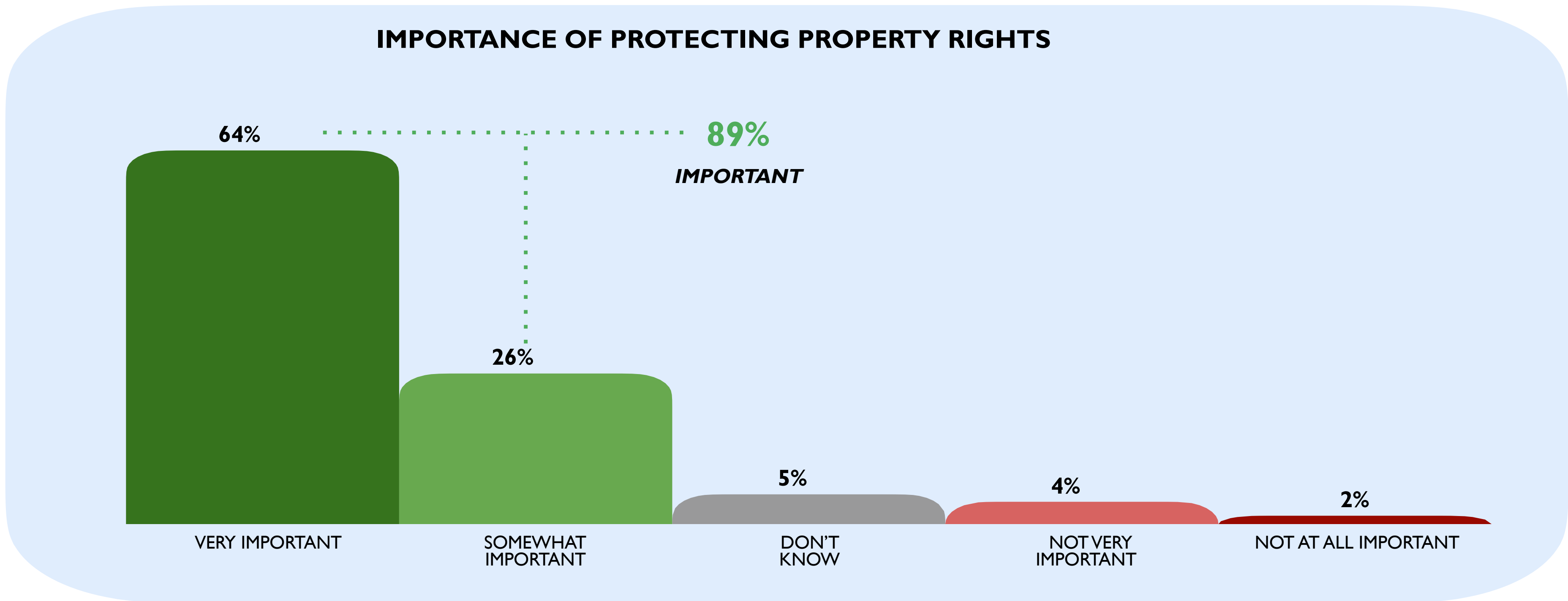


# ARIZONANS OVERWHELMINGLY HOLD ELECTRIC UTILITY COMPANIES RESPONSIBLE FOR RISING ELECTRICITY COSTS, FOLLOWED BY THE OIL & GAS INDUSTRY AND CONSTRUCTION OF DATA CENTERS

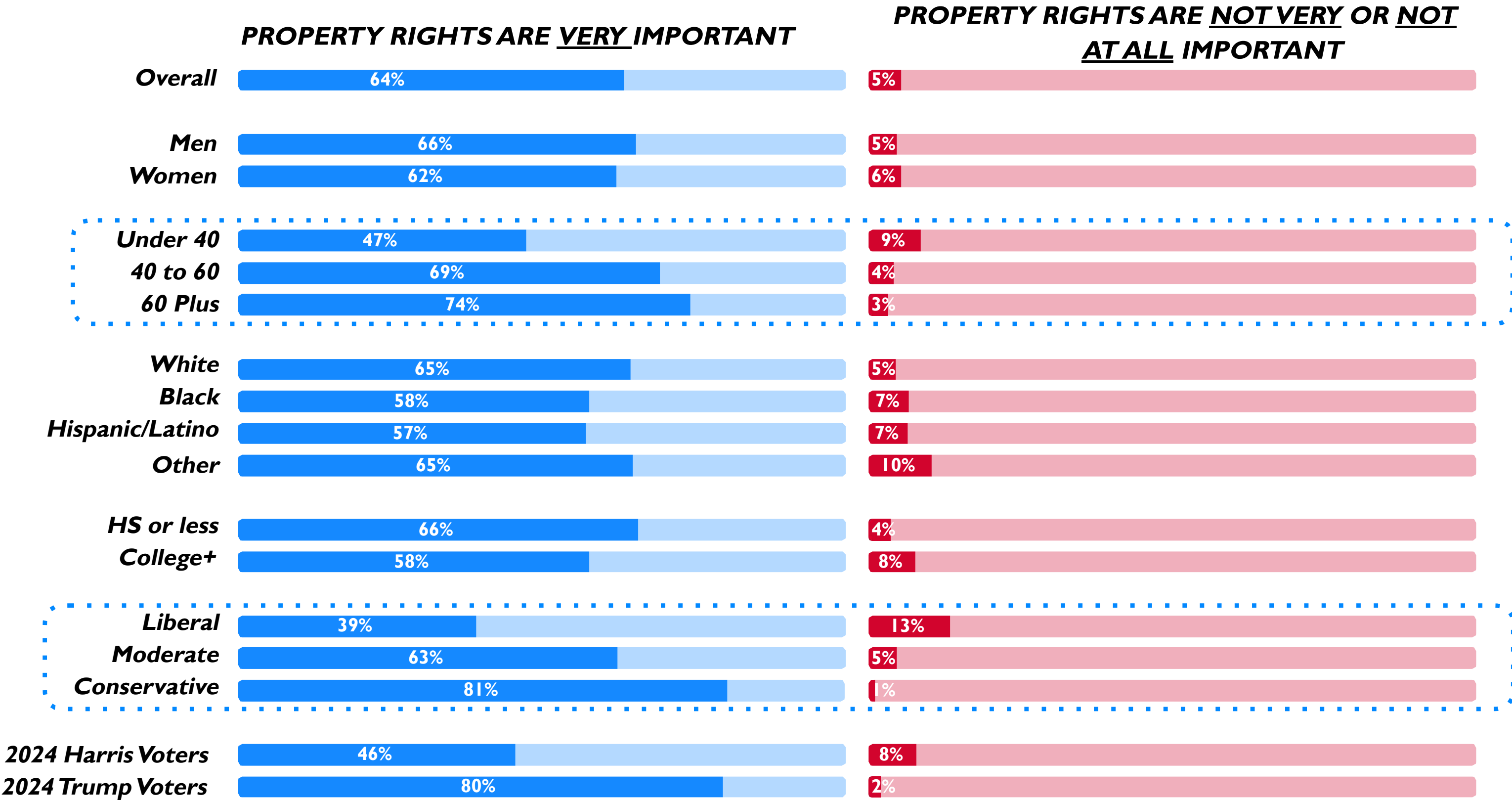




# THE VAST MAJORITY OF RESPONDENTS BELIEVE IT IS IMPORTANT TO PROTECT PROPERTY RIGHTS



# STRONG SUPPORT FOR PROPERTY RIGHTS HOLDS ACROSS MOST DEMOGRAPHIC GROUPS

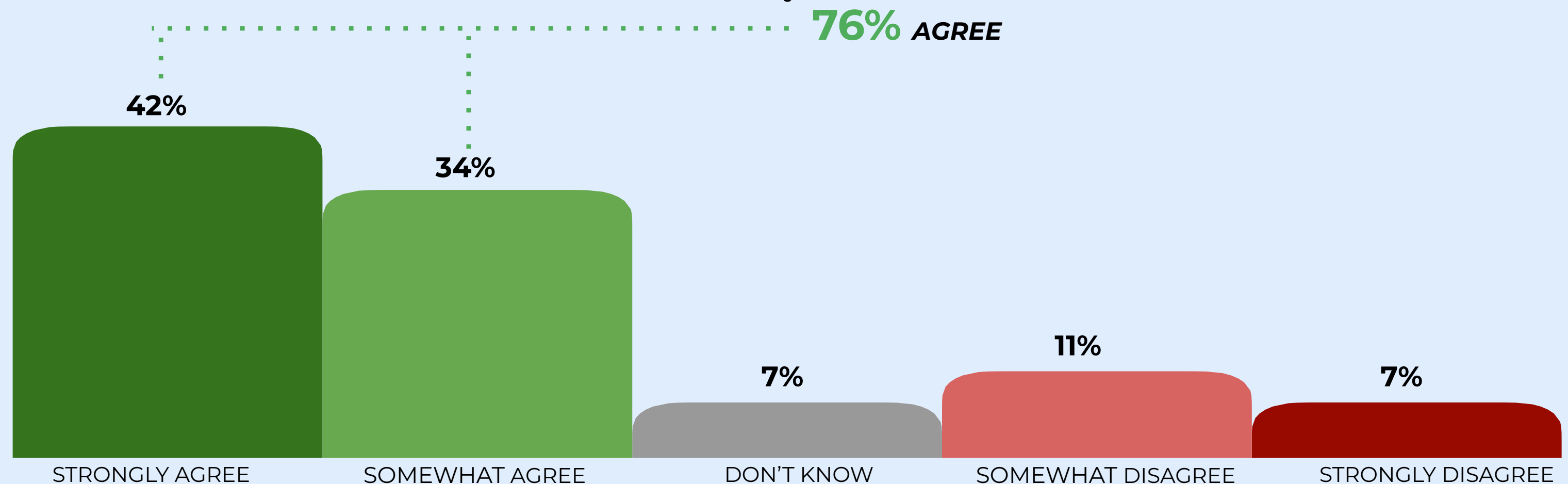




# ARIZONANS BELIEVE THAT PROPERTY OWNERS SHOULD BE ABLE TO USE THEIR LAND AS THEY SEE FIT, INCLUDING FOR RENEWABLE ENERGY DEVELOPMENT

**THIS IS TRUE ACROSS PARTIES, WITH AGREEMENT AMONG 76% OF DEMOCRATS, 74% OF REPUBLICANS, AND 79% OF INDEPENDENTS**

“When it comes to leasing or selling private land to developers for wind and solar farms, Arizonans should be able make their own decisions about what’s best for them without lawmakers getting in the way.”



# EVALUATING AWARENESS AND SUPPORT FOR HB 2223

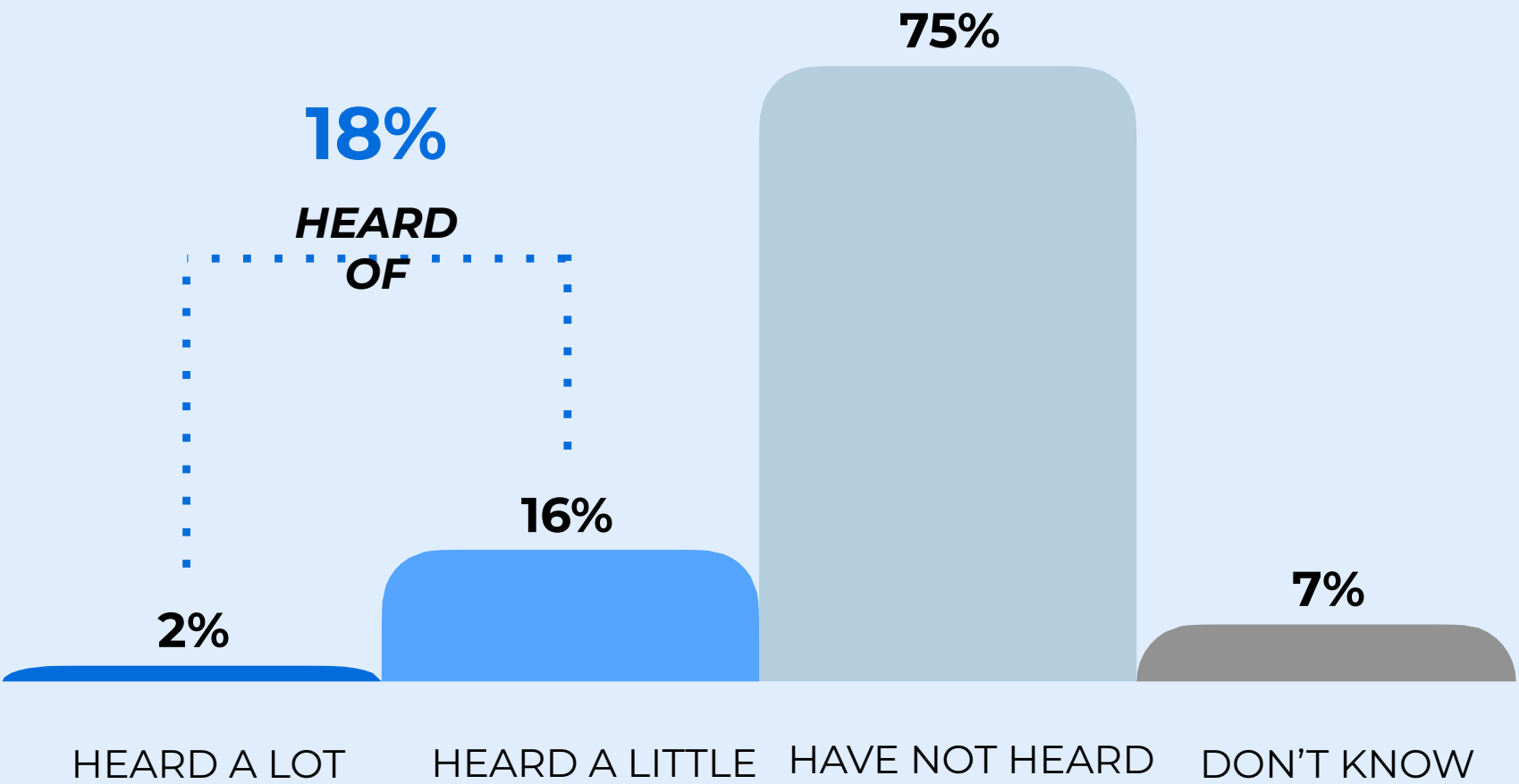
- In early 2025, Representative David Marshall introduced a bill – HB 2223 – that, if enacted, would leave “almost no land available for wind energy in the state.”
- The bill would be “the most restrictive law limiting wind power development in the United States,” per reporting by the Arizona Republic.
- In this survey, Environmental Defense Fund tested whether or not respondents were aware of the bill, and their reactions to the potential severe restriction of wind development.



# VAST MAJORITY OF ARIZONANS HAVE NOT HEARD ABOUT HB 2223, BUT FROM WHAT THEY HAVE HEARD, A PLURALITY OPPOSES MEASURE

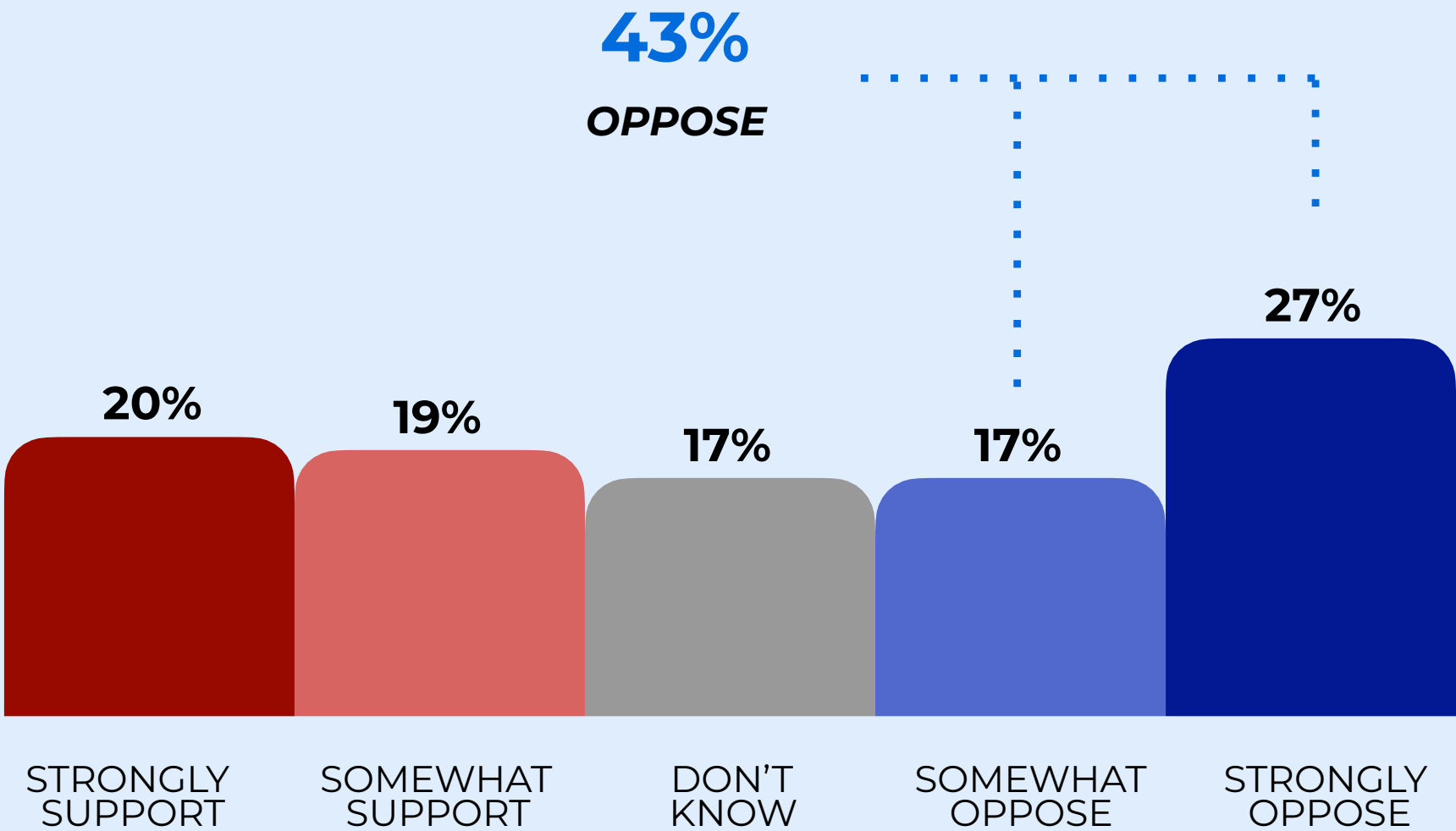
## HEARD OF HB 2223

“Earlier this year, Representative David Marshall introduced a bill, which would establish stricter requirements for wind farm development across the state of Arizona, instituting 12 mile turbine setbacks from residential structures and, as a result, making about 90% of Arizona’s land off limits for wind farms. How much have you heard about this measure?”



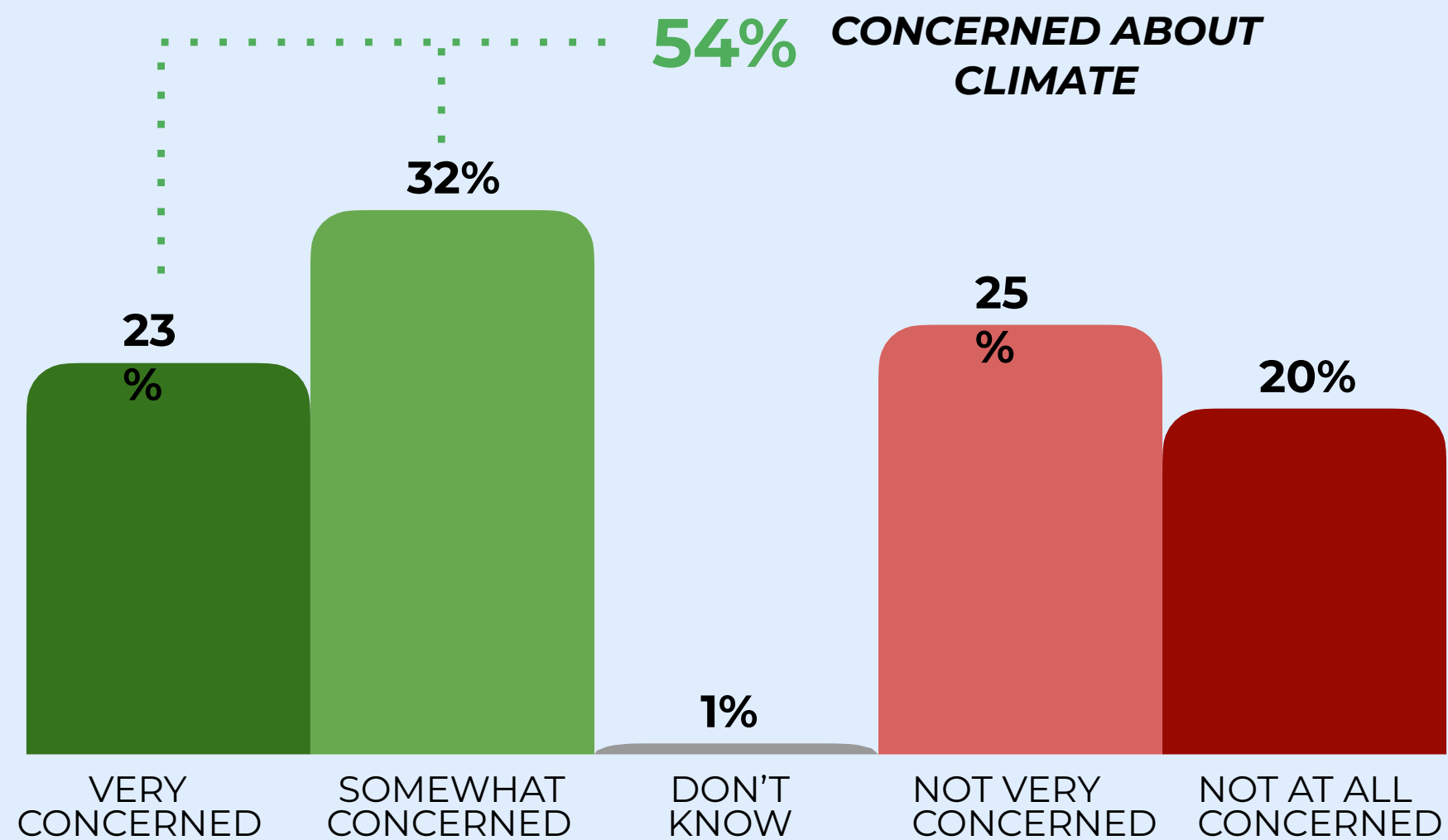
## SUPPORT FOR HB 2223

“Based on what you’ve heard, would you support or oppose this bill, which would establish stricter requirements for wind farm development across the state of Arizona?”

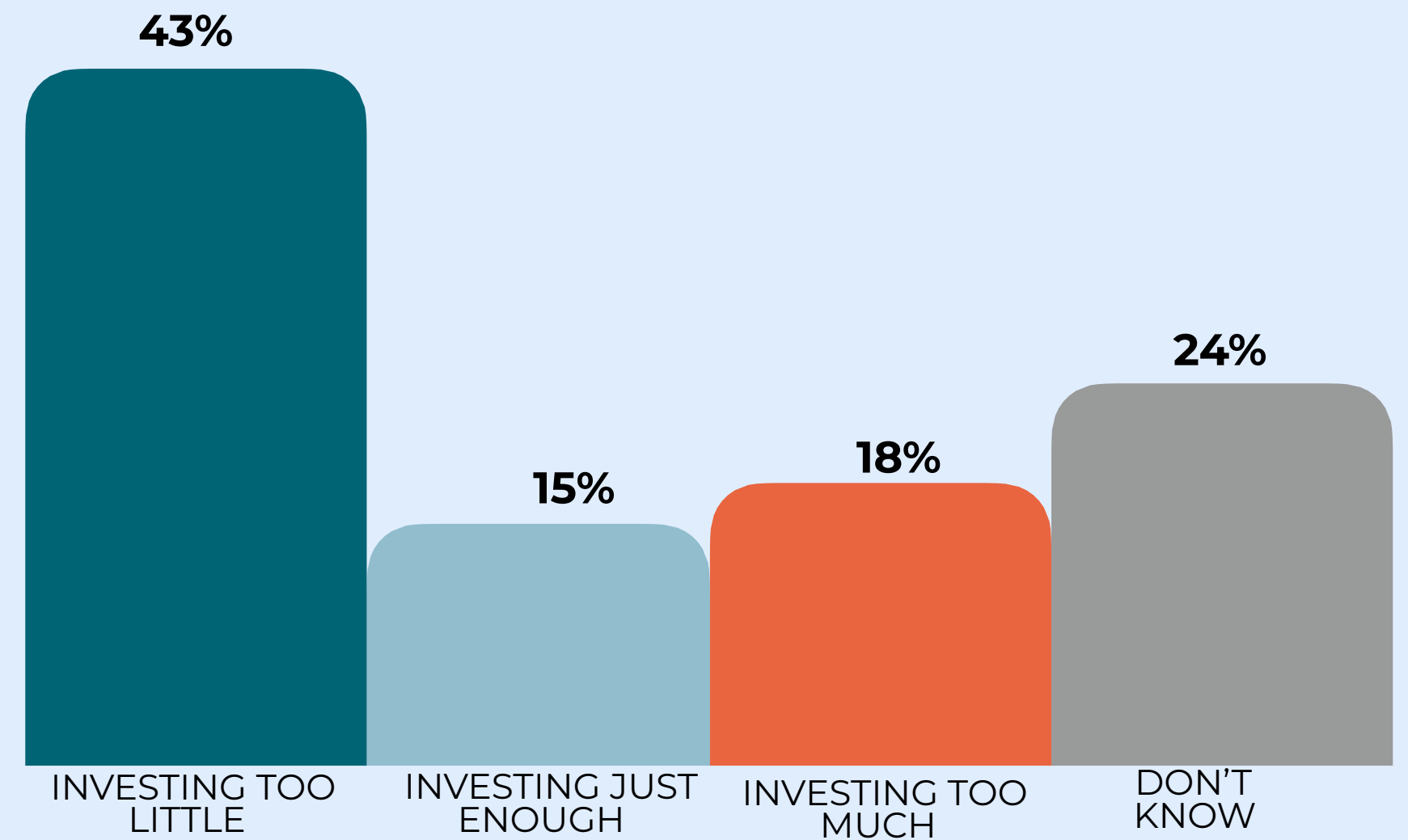


# MOST ARIZONANS ARE CONCERNED ABOUT THE CLIMATE, AND A PLURALITY BELIEVE THAT THE STATE IS INVESTING TOO LITTLE IN RENEWABLE ENERGY

## CLIMATE CONCERN

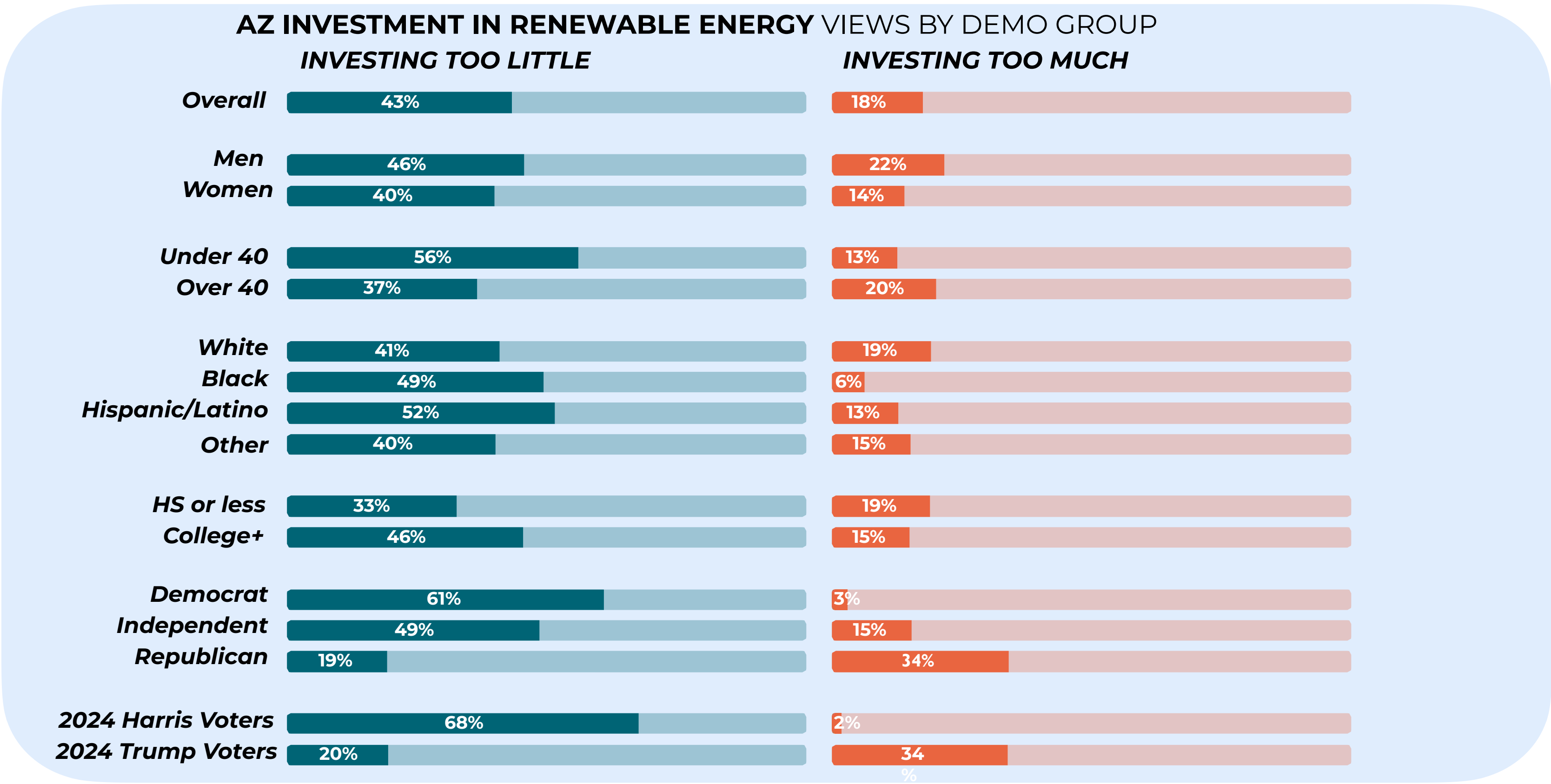


## STATE INVESTMENT IN CLEAN ENERGY



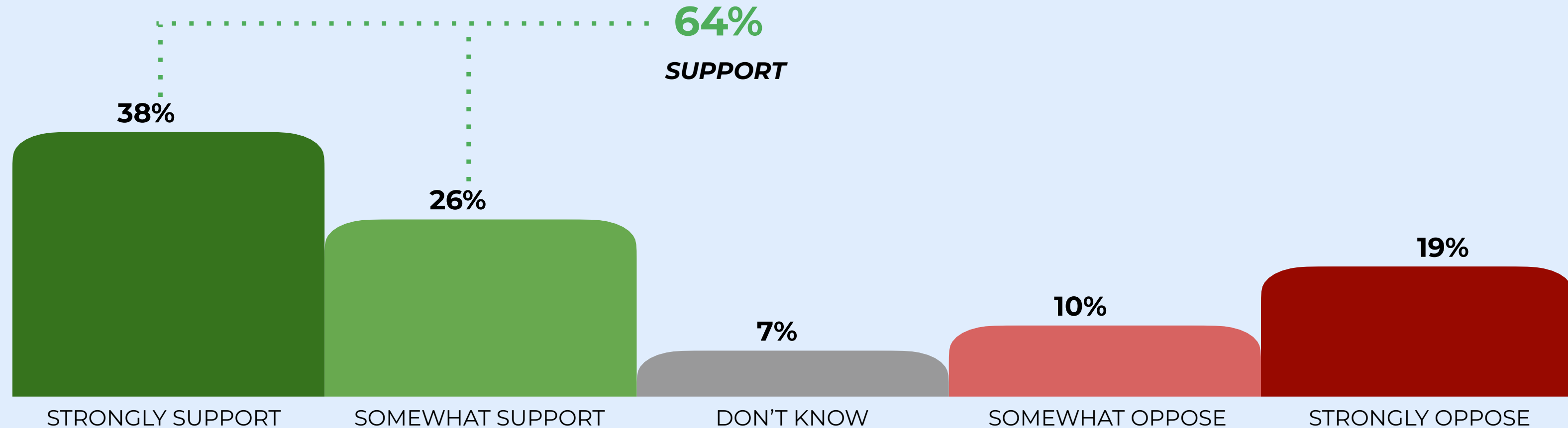


# ACROSS NEARLY ALL GROUPS, ARIZONANS BELIEVE WE ARE INVESTING TOO LITTLE INTO RENEWABLE ENERGY THAN TOO MUCH



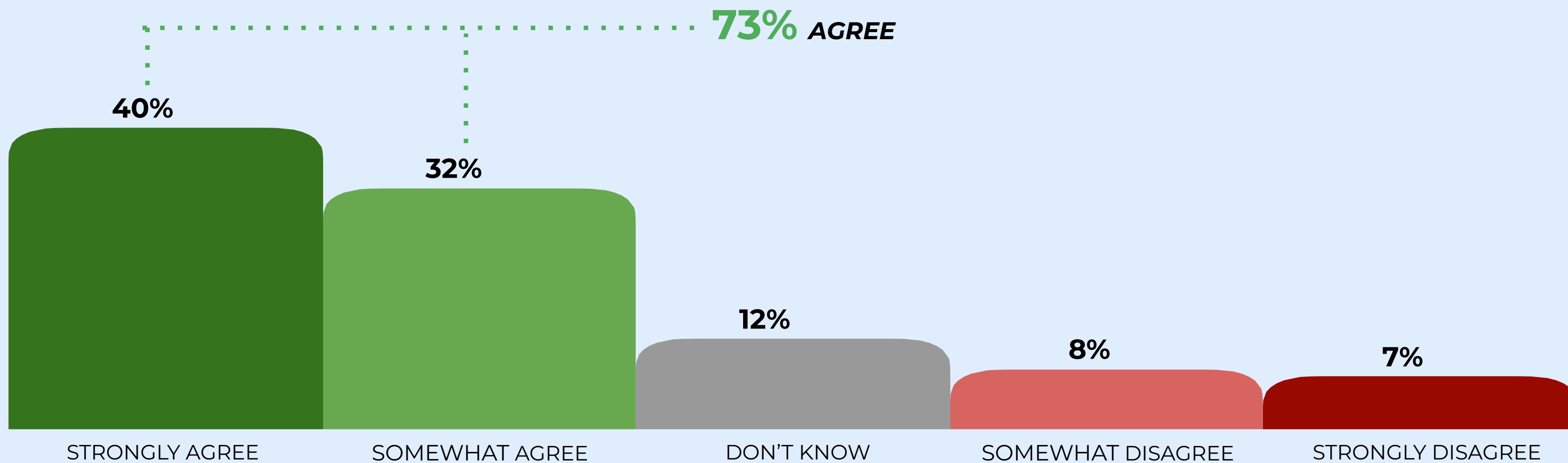
# NEARLY TWO-THIRDS OF RESPONDENTS SUPPORT BUILDING MORE WIND TURBINES AND SOLAR ENERGY

THE MAJORITY OF RESPONDENTS SUPPORT BUILDING MORE WIND AND SOLAR,  
INCLUDING 70% OF INDEPENDENTS



# ARIZONANS BELIEVE THAT RED TAPE AND OVER-REGULATION WILL RAISE UTILITY BILLS

“When lawmakers focus on red tape and over-regulation, Arizonans pay the price in higher utility bills.”



# ASSESSING INFLUENCE OF MISINFORMATION AND DISINFORMATION

- ➔ As part of this survey, Environmental Defense Fund shared multiple factual and disinformation statements with respondents, to gauge the impact of renewable energy disinformation on voters and test the believability of messaging on the benefits of renewables.
- ➔ Factual Statements Tested:
  - ◆ “Bringing more renewable energy sources onto the electric grid will make the electricity that powers our homes more reliable.”
  - ◆ “Building new renewable energy projects will bring down the cost of utilities.”
  - ◆ “State policies that restrict renewable energy discourage economic growth and end up costing Arizonans more in the long run.”
  - ◆ “Communities with wind and solar projects have more money to spend on local projects, such as improving roads, providing emergency services, and updating schools.”
- ➔ Disinformation Statements Tested:
  - ◆ “Building more wind and solar projects will negatively impact many of Arizona's wildlife species.”
  - ◆ “Living near a wind farm can affect people's health due to noise from the turbines.”

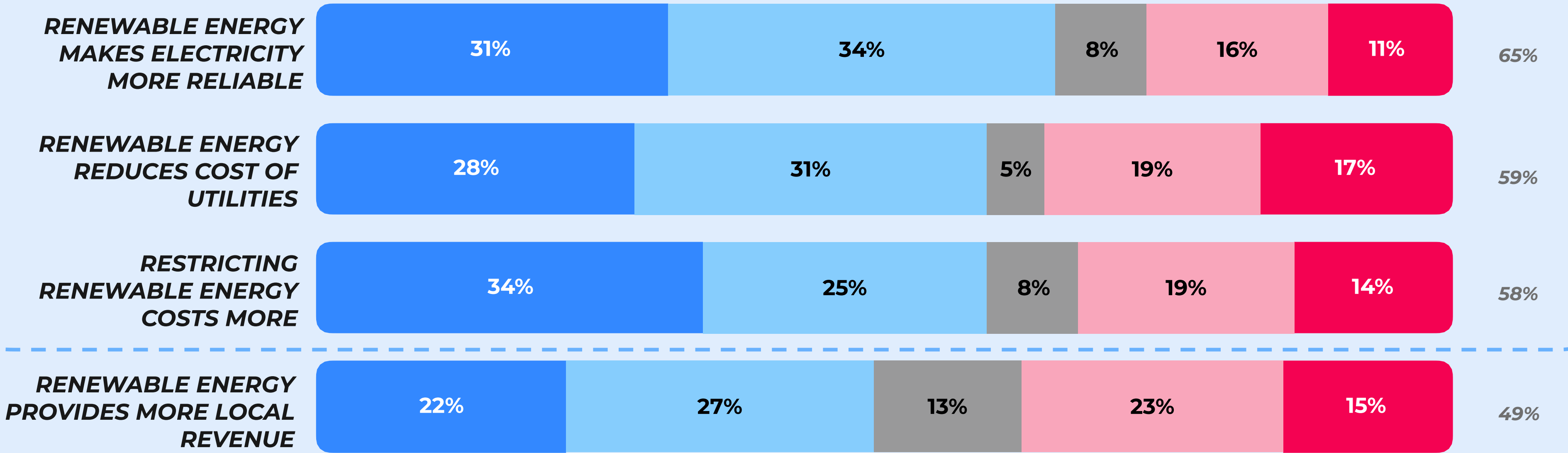


# MAJORITY OF ARIZONANS BELIEVE MESSAGING ON THE BENEFITS OF RENEWABLE ENERGY PROJECTS

## MESSAGE BELIEVABILITY TRUE CLAIMS

■ VERY BELIEVABLE ■ SOMEWHAT BELIEVABLE ■ DON'T KNOW ■ NOT VERY BELIEVABLE ■ NOT AT ALL BELIEVABLE

% VERY/  
SMWT  
BELIEVABLE



HOWEVER, A MAJORITY ARE ALSO SUSCEPTIBLE TO DISINFORMATION  
THAT WIND AND SOLAR PROJECTS WILL NEGATIVELY IMPACT  
WILDLIFE

MESSAGE BELIEVABILITY FALSE CLAIMS

