



North Carolina Voters

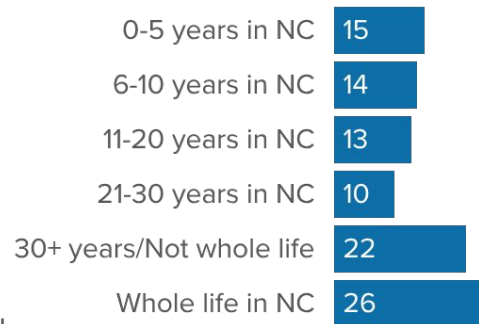
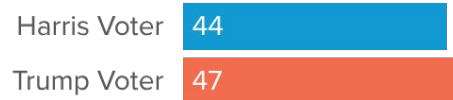
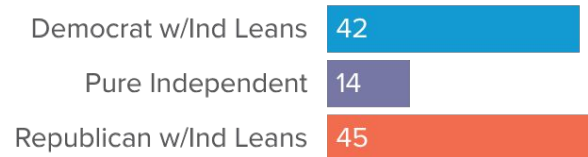
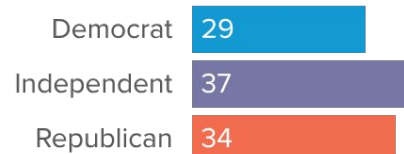
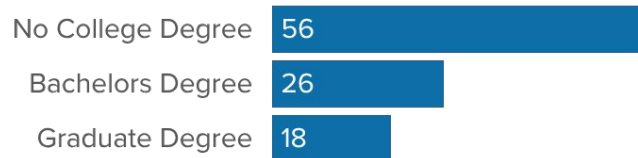
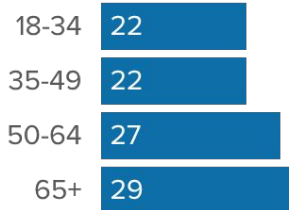
1,069 Voters – January 31st-February 4th, 2026

Poll Results - Methodology



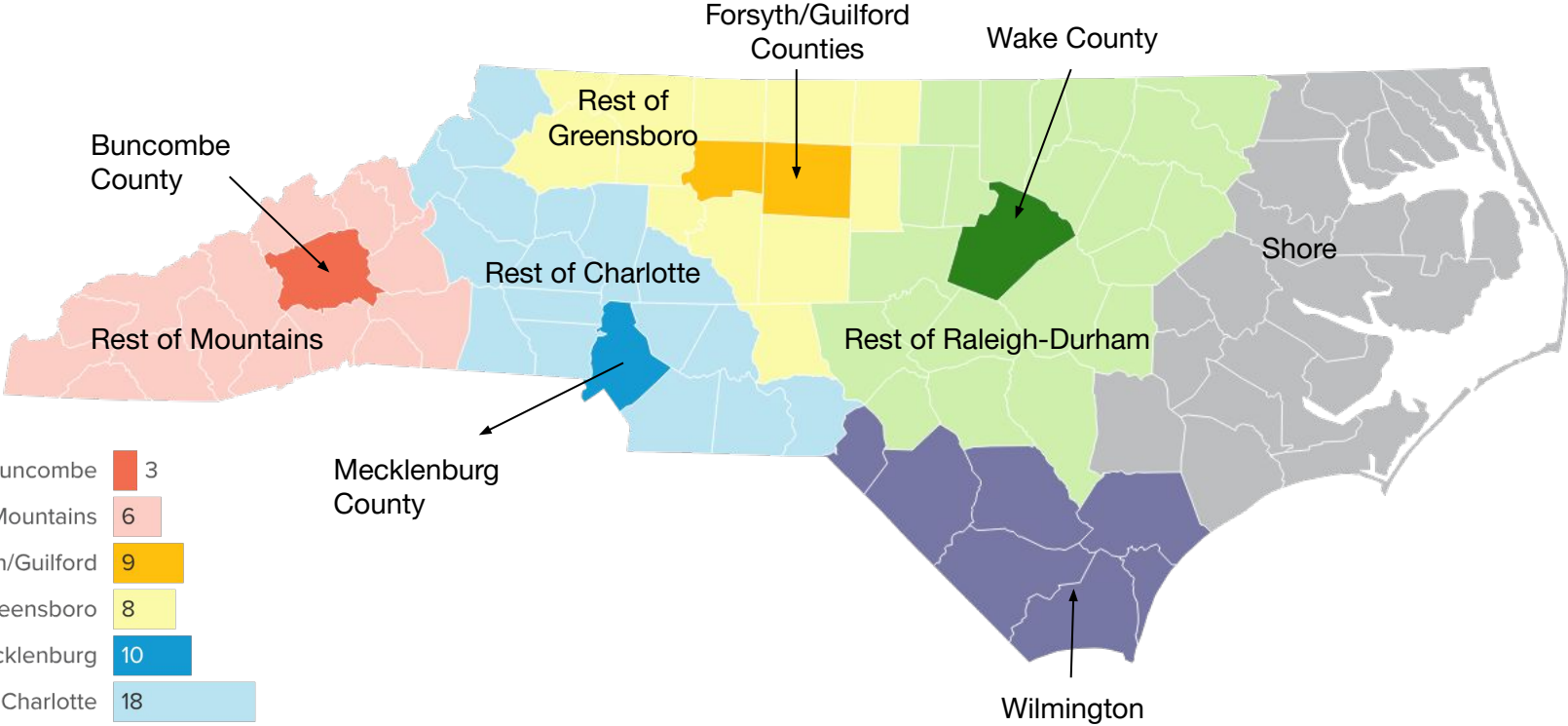
- 1,069 Voters – Statewide
- Interviewing conducted January 31-February 4th, 2026 online using social media recruitment and SMS text messaging
- The final results are weighted to reflect the distribution of voters based on age, gender, race/ethnicity, education, 2024 presidential vote, and political region
- The survey has a margin of error of 3.1 percentage points

Who We Interviewed



Note: All numbers in this presentation represent the % of people surveyed

Where We Interviewed



Buncombe	3
Rest of Mountains	6
Forsyth/Guilford	9
Rest of Greensboro	8
Mecklenburg	10
Rest of Charlotte	18
Wake	11
Rest of Raleigh Durham	20
Wilmington	7
Shore	9

Key Findings

Key Findings

- **Donald Trump's support has fallen sharply in North Carolina.** He is deeply unpopular with Independents. A majority of all voters, 55%, have an unfavorable opinion of him, and 55% disapprove of the job he's doing as President.
- **Roy Cooper leads Michael Whatley in the Senate race** 50% to 40%.
- **Voters rate Josh Stein positively and approve of the job he is doing as Governor.**
- **In the 2028 presidential election, North Carolina will be up for grabs and a crucial swing state.** 42% say they will support the Democratic nominee and 42% say they will support the Republican nominee.
- **Majorities do not trust the Immigration and Customs Enforcement Agency (ICE),** do not believe recent actions in North Carolina have made the state safer, do not believe the federal government should have absolute power when it comes to immigration enforcement, and do not find the deaths of Renee Good and Alex Pretti in Minneapolis justified.
- **Democrats have an opportunity to make election gains in the state in 2026 and 2028.** Voters hold negative views of the Republican-controlled state legislature. Democrats have powerful positive messages in legislative races.

Report Outline



- Who Is Movable in 2026
- Direction of the United States and North Carolina
- National Political Environment – Where Donald Trump Stands
- North Carolina Political Environment – Where Josh Stein Stands
- The 2026 Election
- The 2028 Election
- The Cost-of-Living Crisis
- Immigration and ICE

Who Is Movable in 2026

Profile of Movable Voters

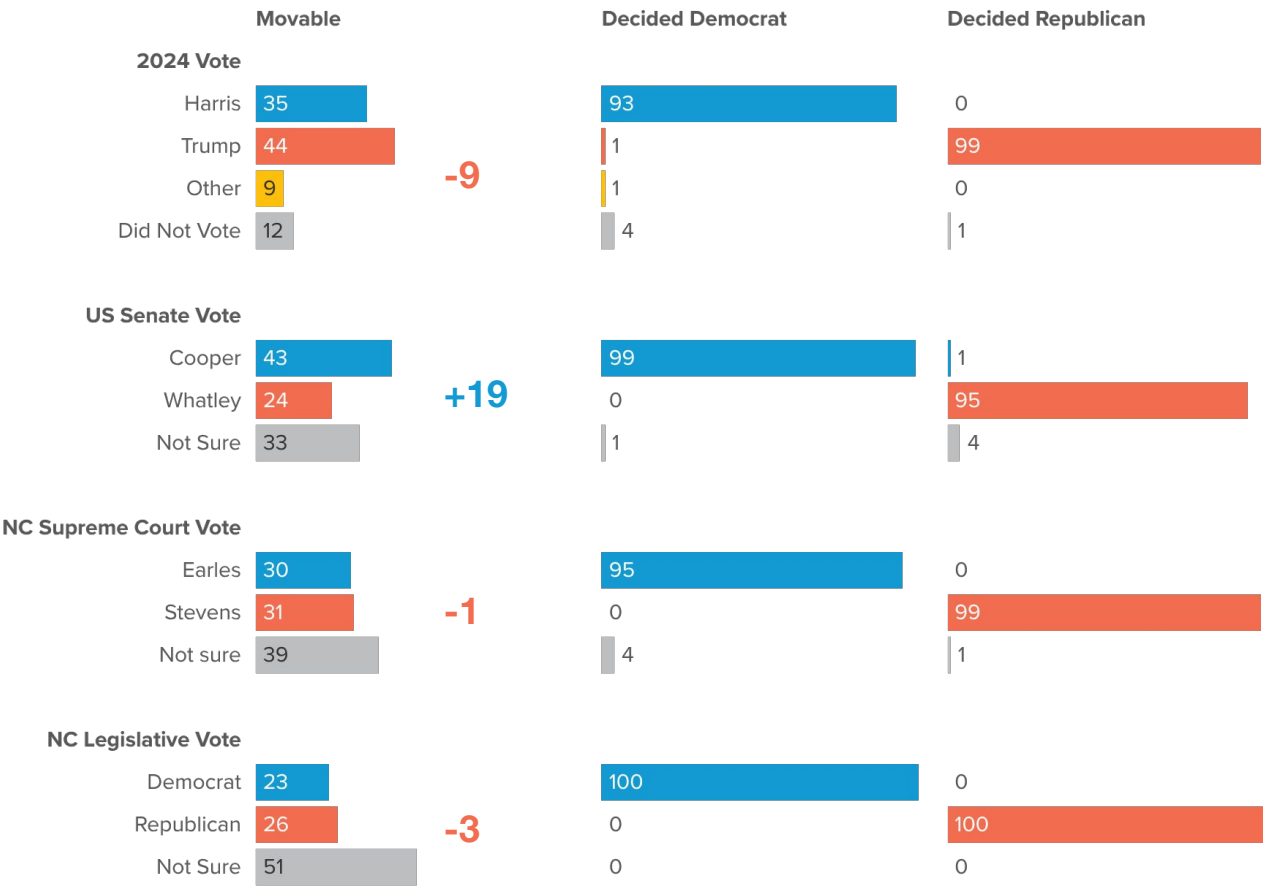
This report highlights attitudes of voters most persuadable in 2026. These “movable” voters make up 27% of the electorate. We define movable voters in the following way:

- Somewhat disapprove of the job Donald Trump is doing as president or are not sure
- Undecided in the generic North Carolina legislature vote
- Are unfavorable towards the Democratic and Republican parties



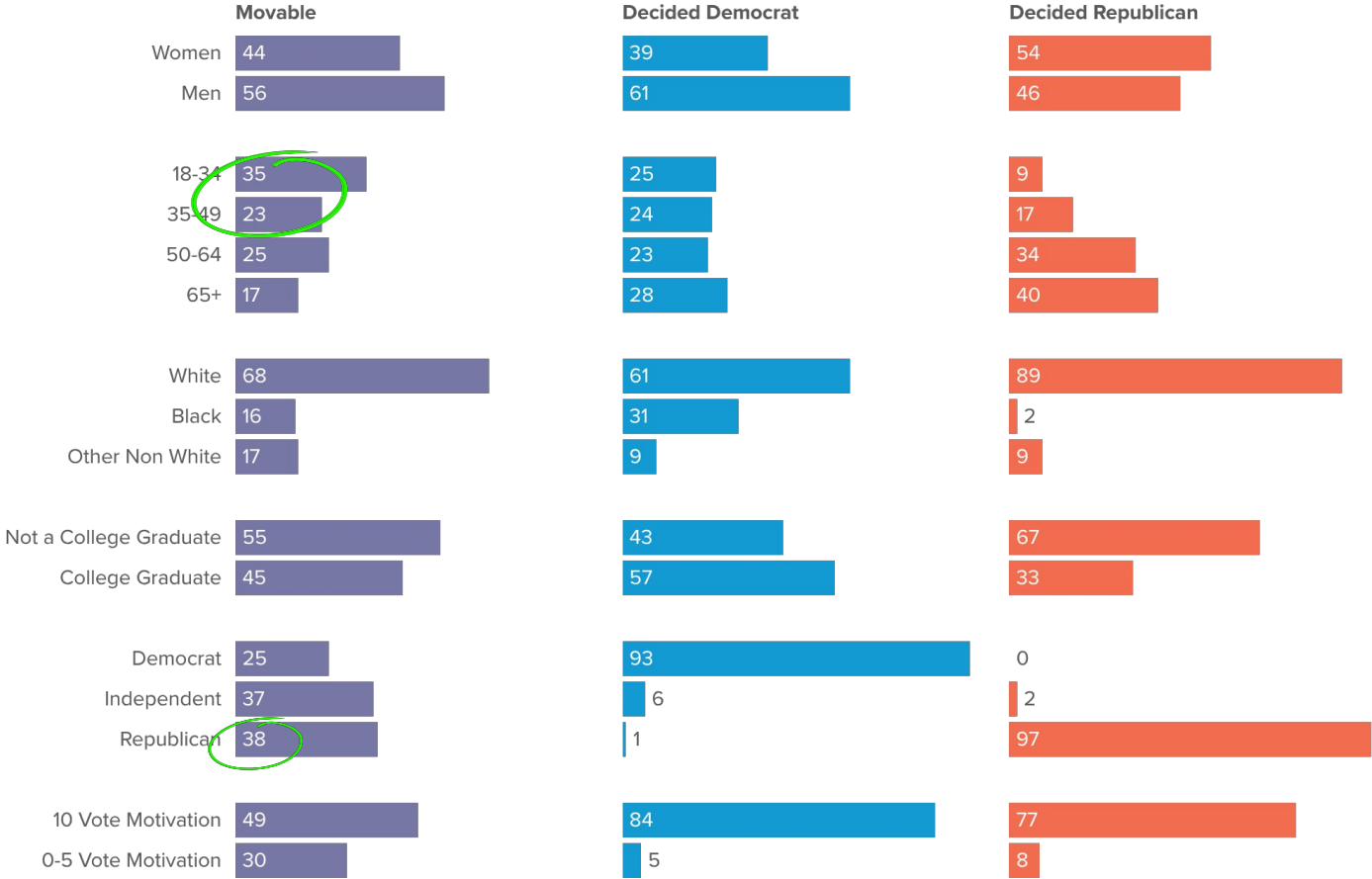
Profile of Movable Voters

Movable Voters narrowly went for Trump in 2024. Roy Cooper leads decisively with them while they split in other races.



Profile of Movable Voters (%s Read Down)

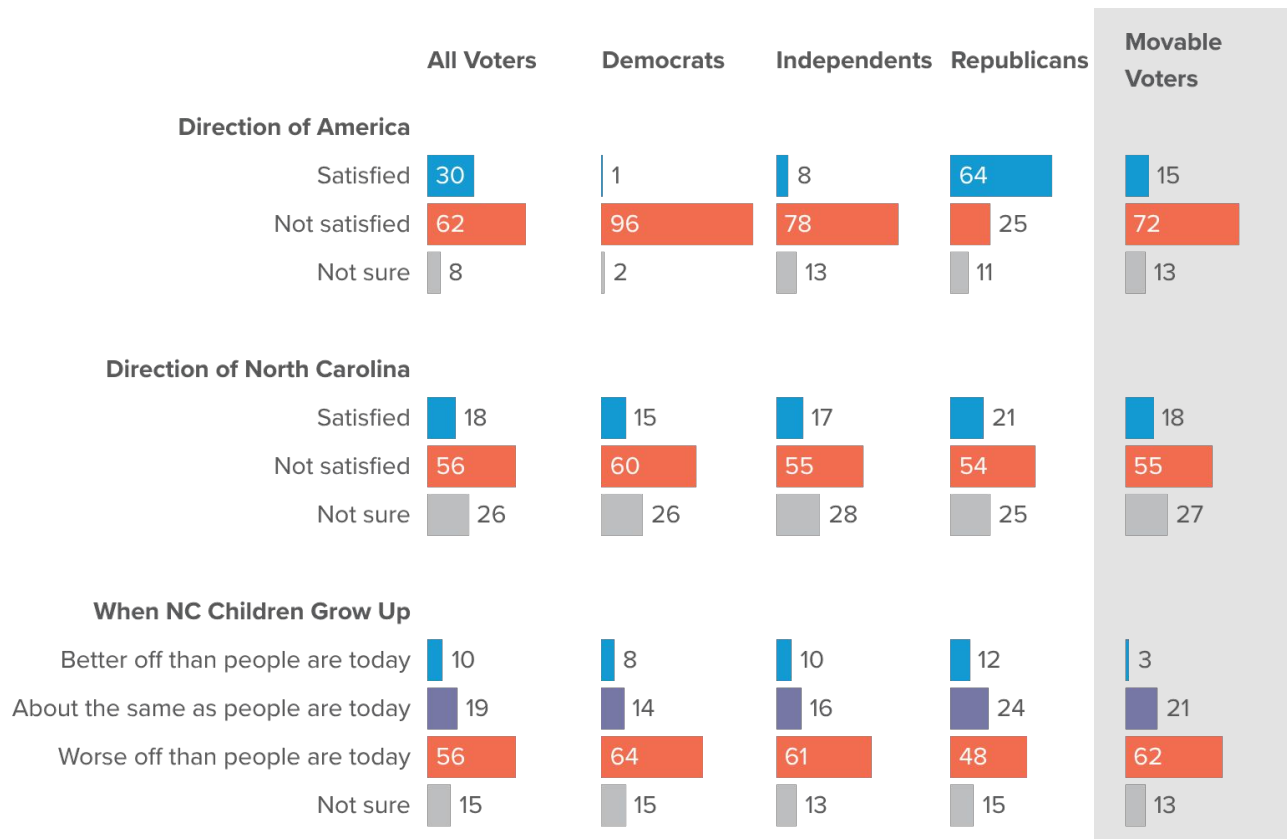
Movable Voters are much younger than those decided, tilt Republican, are less motivated to vote, and a substantial share are nonwhite.



Direction of the United States and North Carolina

Assessment of the State and Country

Democrats and Independents are not satisfied with the direction of the country while Republicans are. Voters in all parties are not satisfied with the direction of North Carolina and don't believe today's children will grow up better off than people are now. Independents and movables have the bleakest outlook.



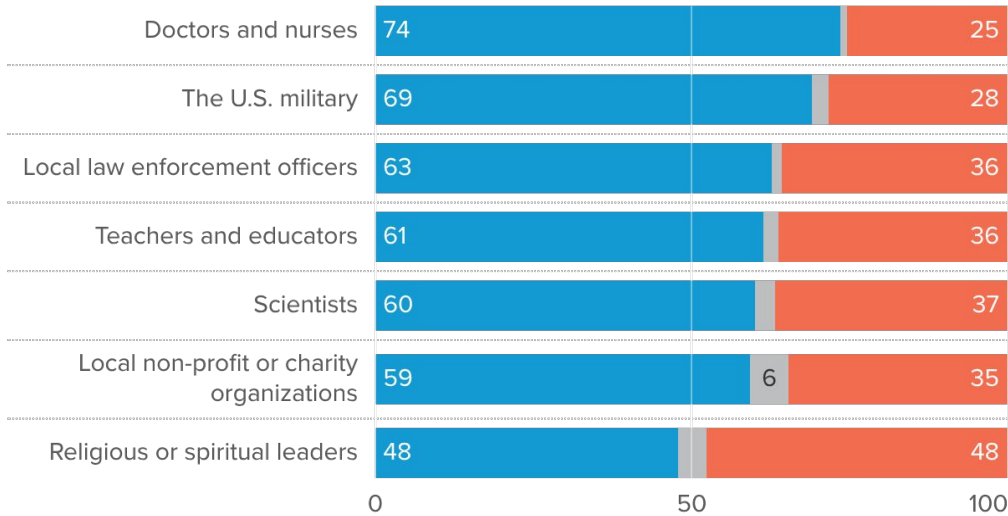
Trust in Individuals and Groups



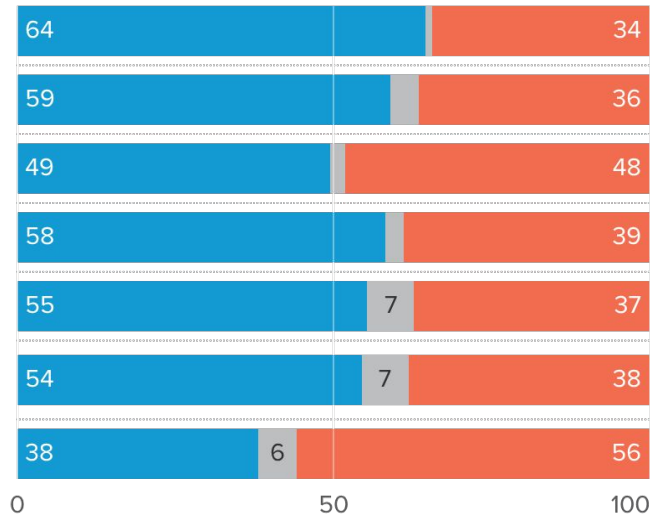
In general, voters trust individuals in helping professions as well as the U.S. military. Voters overall split on trusting religious leaders, while a majority of movable voters do not trust them.

● Trust ● Not Sure ● Do Not Trust

All Voters



Movable Voters

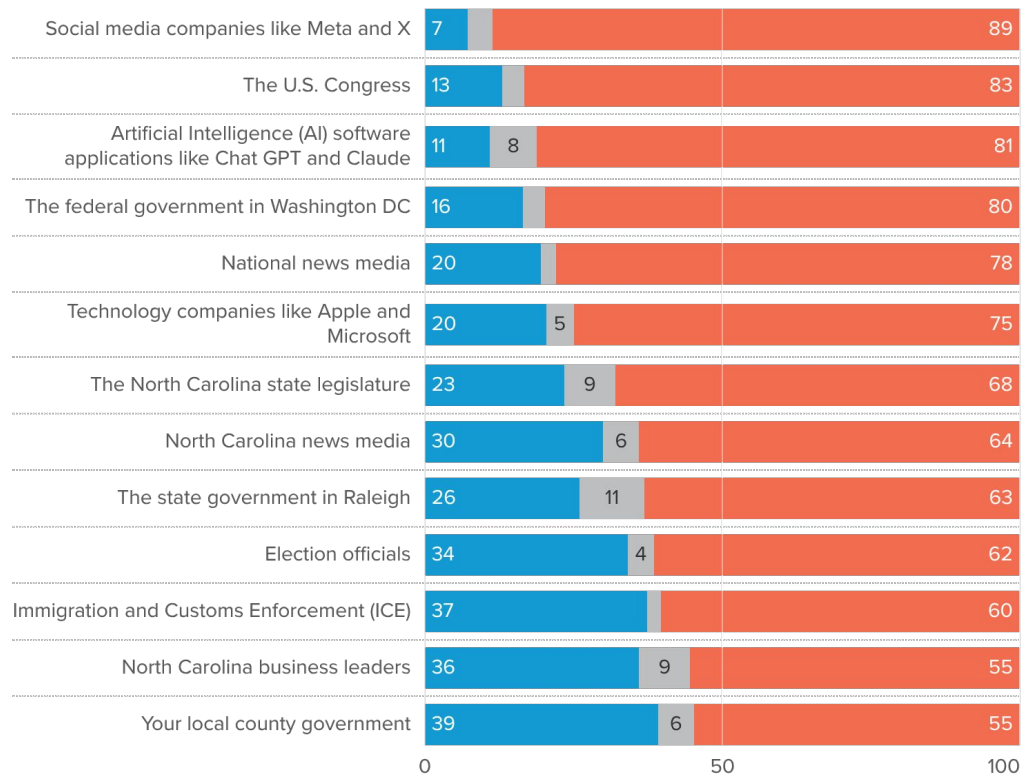


Trust in Individuals and Groups

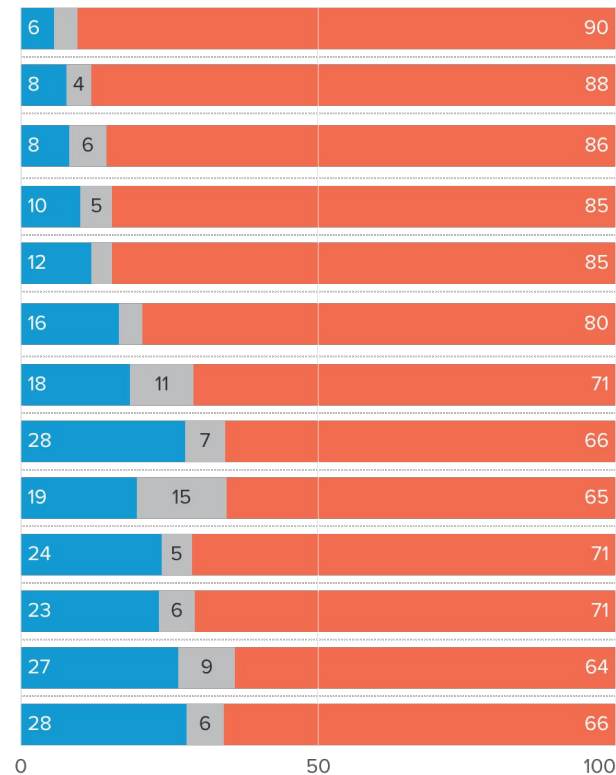
Voters, especially movables, do not trust technology companies, the media, the federal and state government, governing bodies, elected officials, and business leaders. This crisis of distrust will continue to feed instability at the national, state, and local levels unless effectively addressed.

● Trust ● Not Sure ● Do Not Trust

All Voters



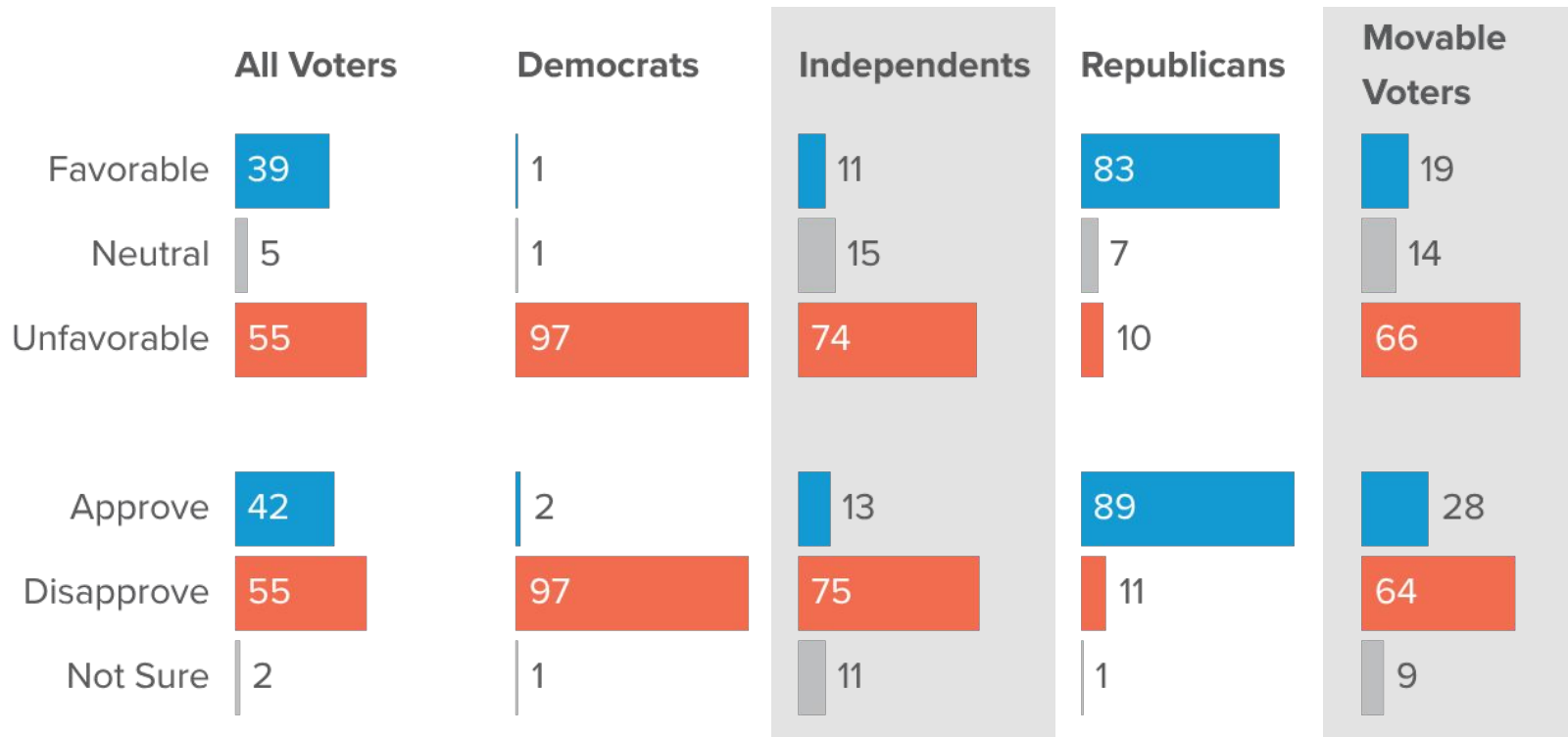
Movable Voters



National Political Environment – Where Donald Trump Stands

Trump Personal Popularity and Job Approval

Despite winning the state narrowly three times, Donald Trump is underwater with a solid majority of voters in North Carolina. Two-third of movable voters oppose him despite him narrowly winning them in 2024. He is deeply unpopular with Independents. His strong rating with Republicans is the only thing keeping him out of the abyss.

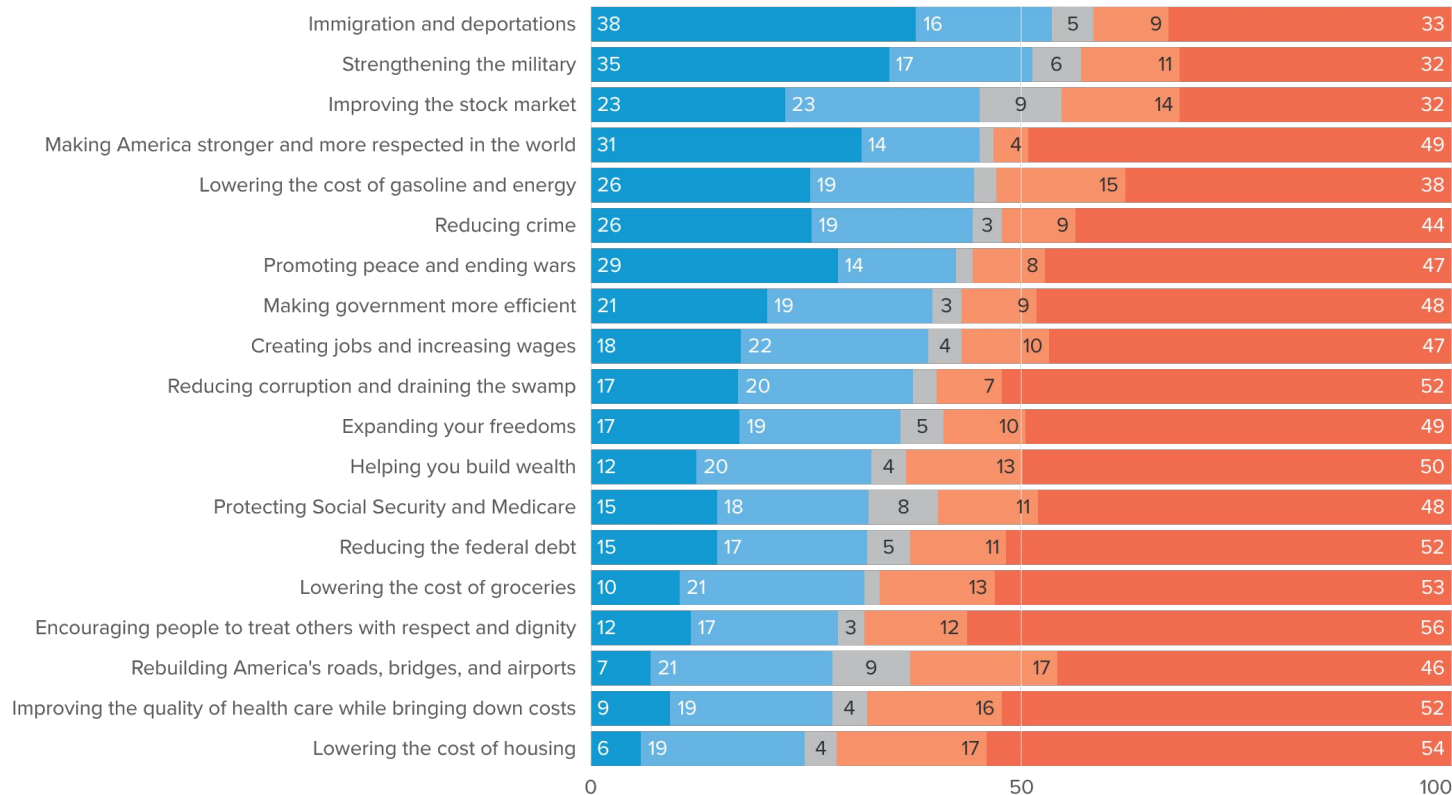


Amount of Progress of the Trump Administration Has Made on Issues

Outside of immigration, the military, and the stock market, majorities do not see the administration making progress on solving the nation's challenges. This is especially true on costs (such as groceries, health care, and housing).

● A Lot of Progress ● Some Progress ● Not Sure ● Not Too Much Progress ● No Progress at All

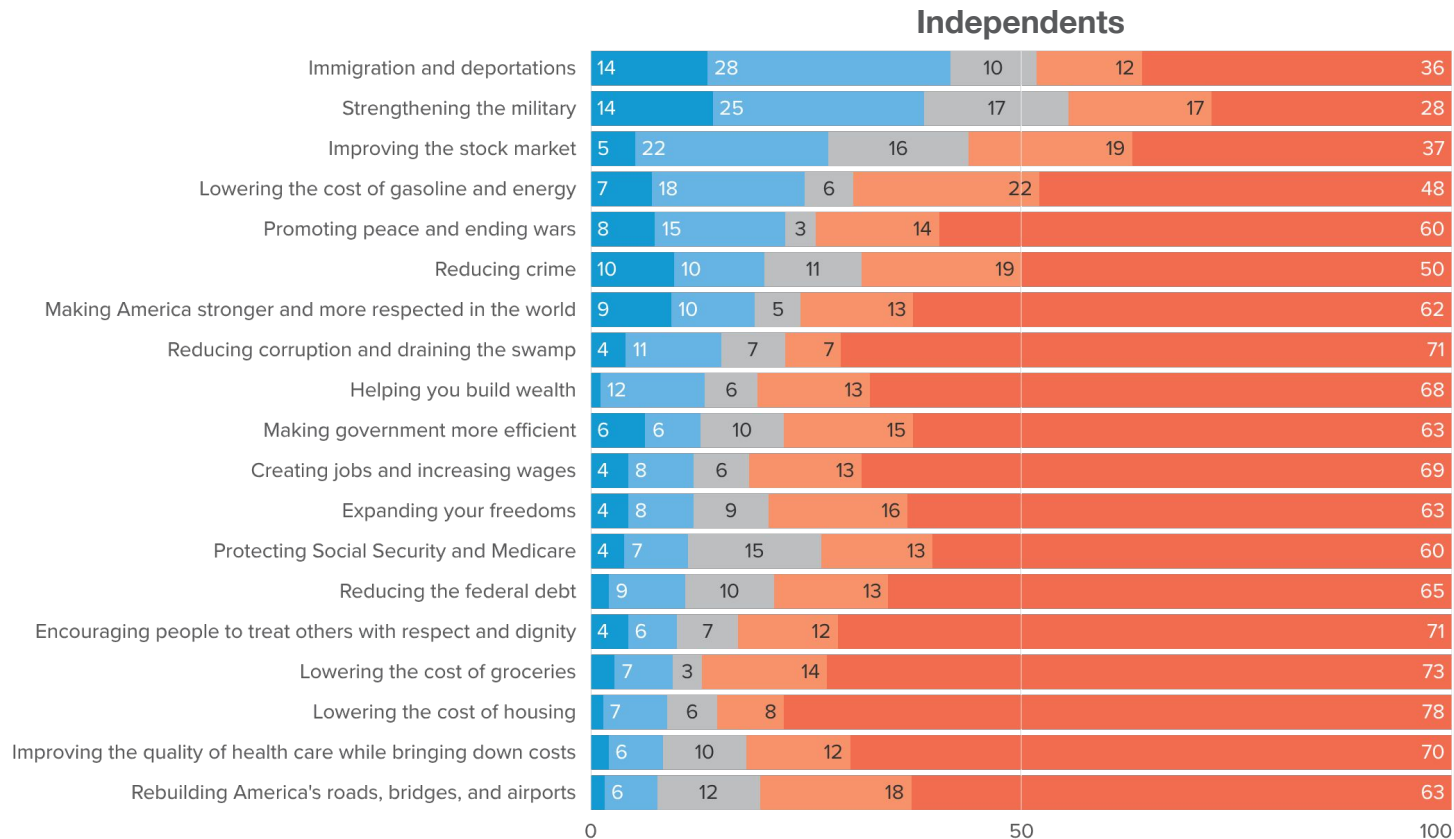
All Voters



Progress of the Trump Administration

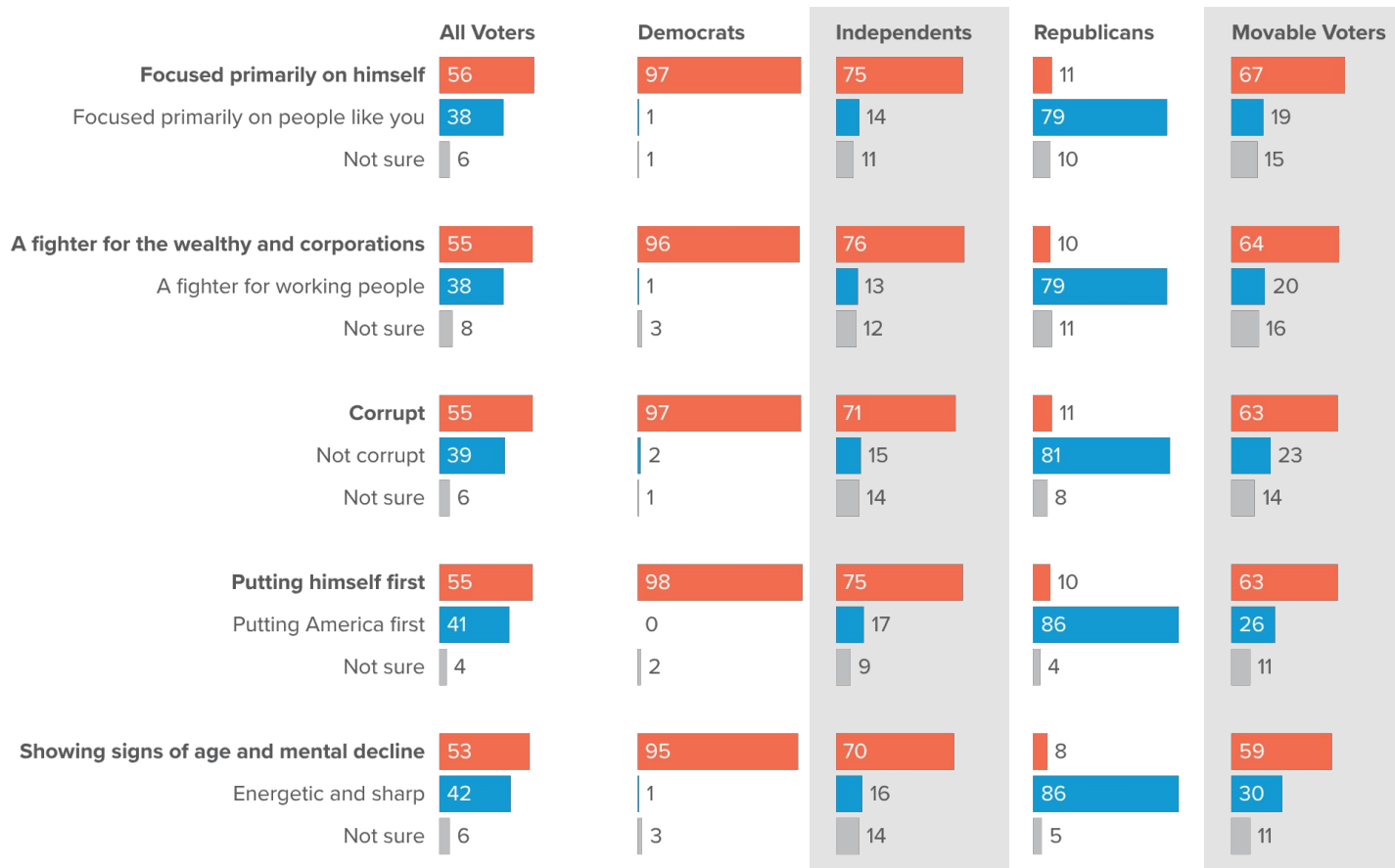
Independent voters don't see progress on anything other than deportations and the military.

● A Lot of Progress ● Some Progress ● Not Sure ● Not Too Much Progress ● No Progress at All



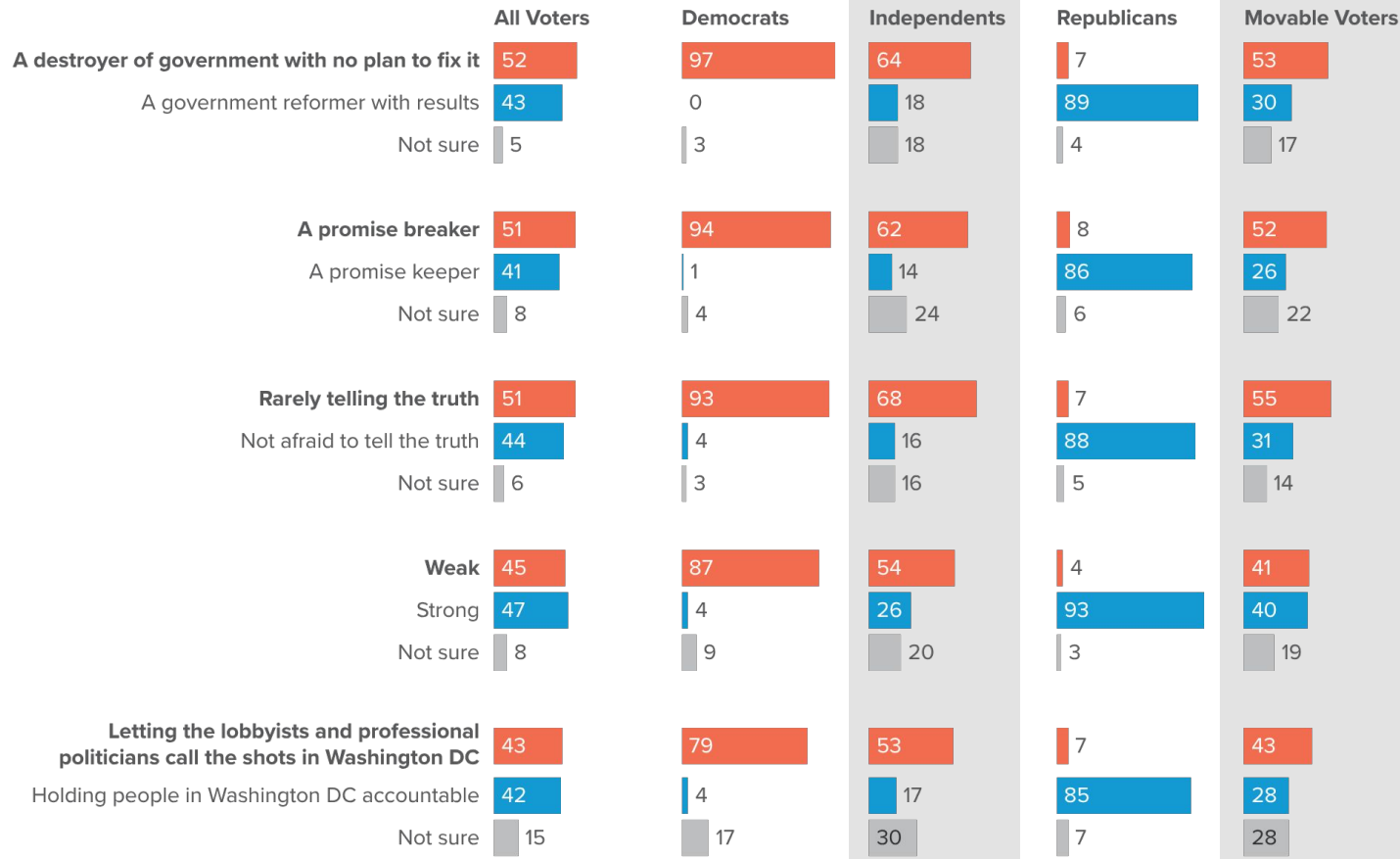
Which Best Describes Donald Trump?

Trump is most vulnerable to attacks on his corruption and prioritizing himself and the wealthy over the people.



Descriptions of Trump

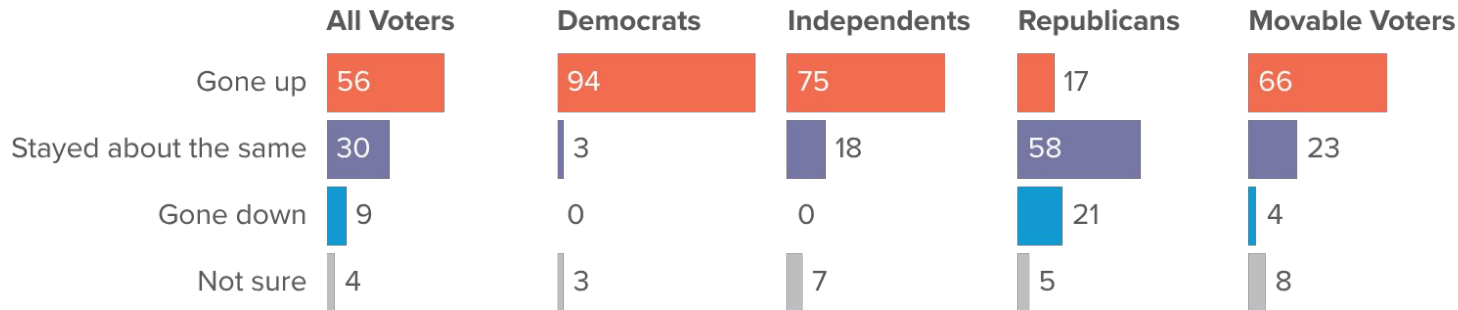
He is least vulnerable to attacks on being weak or not in charge. Voters see him in charge, they just don't see the results.



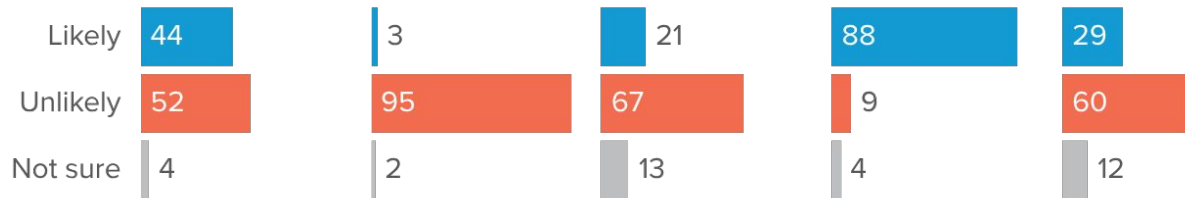
View on Tariffs

Majorities of voters, and even more movable voters, believe costs have gone up as a result of Trump's tariffs and do not believe the tariffs will bring manufacturing jobs back to North Carolina.

Since President Trump imposed new tariffs last year on goods from countries like China, have your costs for everyday things like groceries, appliances, or household goods:



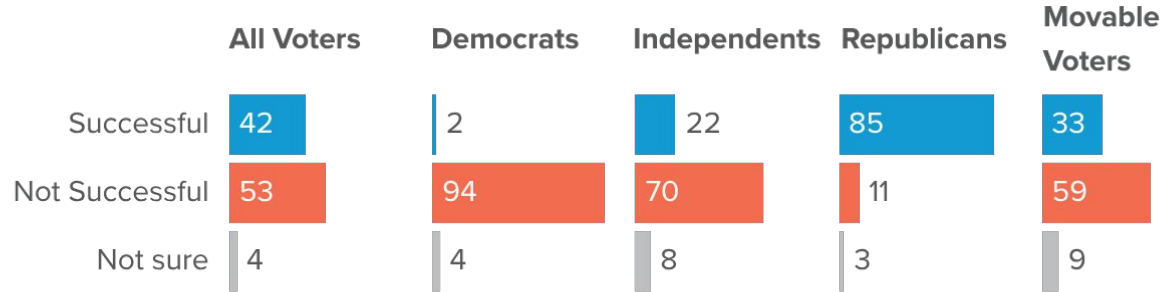
How likely do you think it is that President Trump's tariffs will help bring manufacturing jobs back to North Carolina in the next few years?



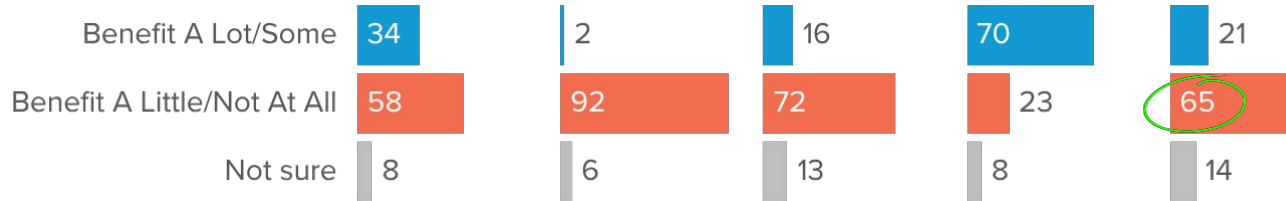
Views on the Department of Government Efficiency and the “Big Beautiful Bill”

Majorities of voters do not believe Elon Musk’s efforts to make the government more efficient were successful and do not expect to benefit from the tax law passed by Republicans last year.

Last year, Tesla and SpaceX CEO Elon Musk was appointed as head of the Department of Government Efficiency (DOGE) to save money and make the federal government efficient. How successful do you think Musk and DOGE were in reducing waste, fraud, and abuse?

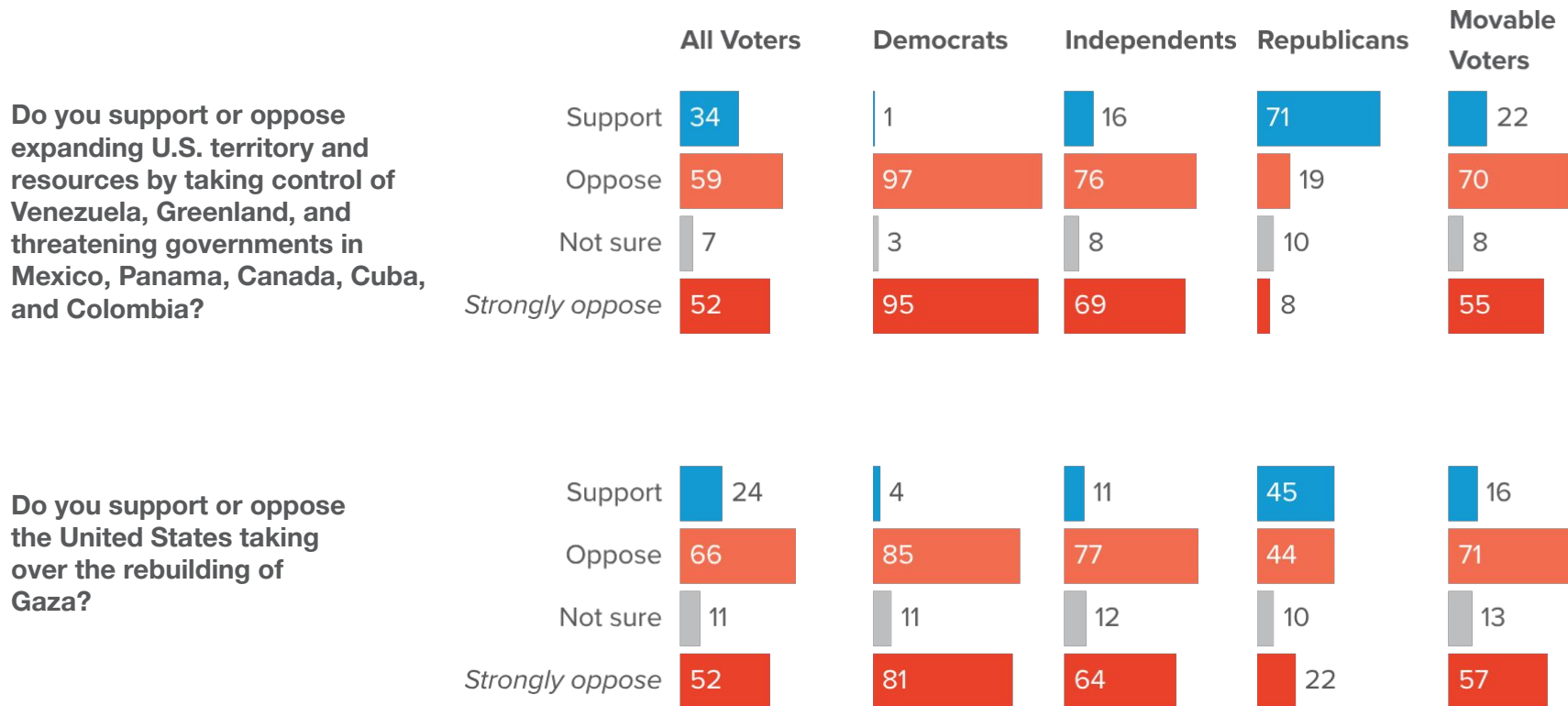


Last year, Congress passed a tax and budget law known as the “Big Beautiful Bill.” How much do you expect to benefit from this law?



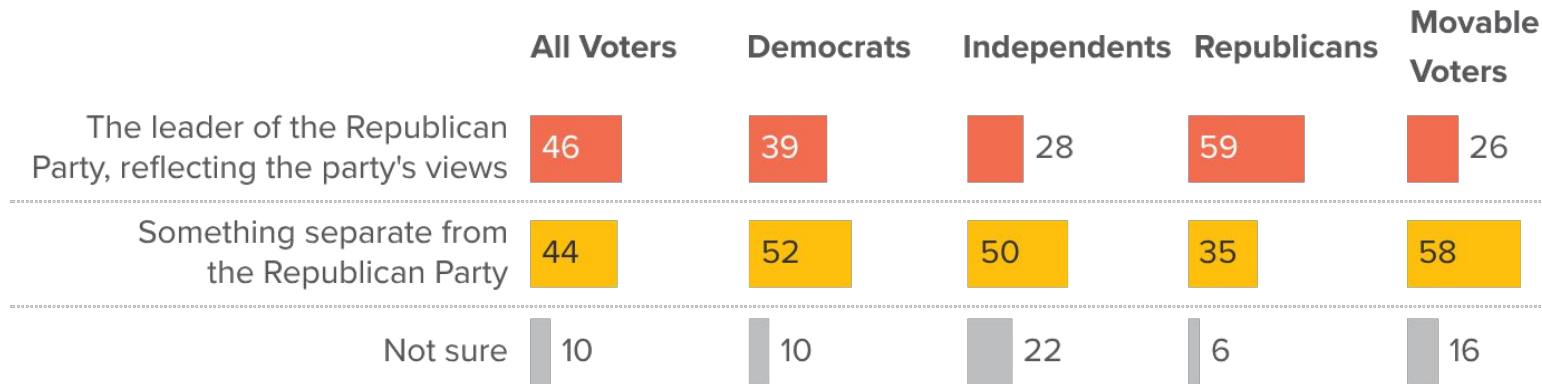
Recent Foreign Policy Actions

Majorities of voters oppose efforts to expand U.S. territory in the western hemisphere and oppose taking over the rebuilding of Gaza.



Do You See Trump as...

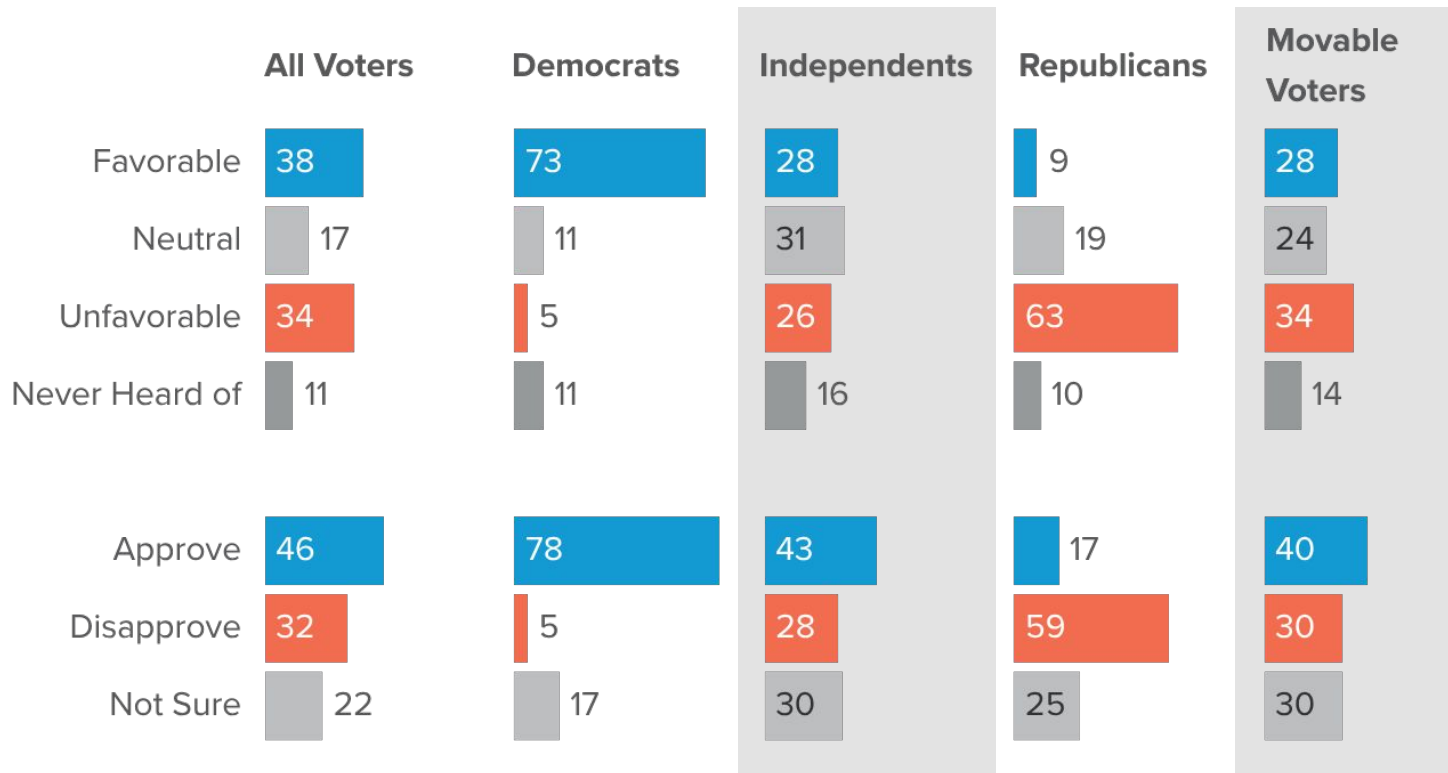
Voters split on whether Trump is the leader of the Republican Party or something separate. A majority Republicans see him as the leader while majorities of Democrats, Independents, and movable voters see him as something else.



North Carolina Political Environment – Where Josh Stein Stands

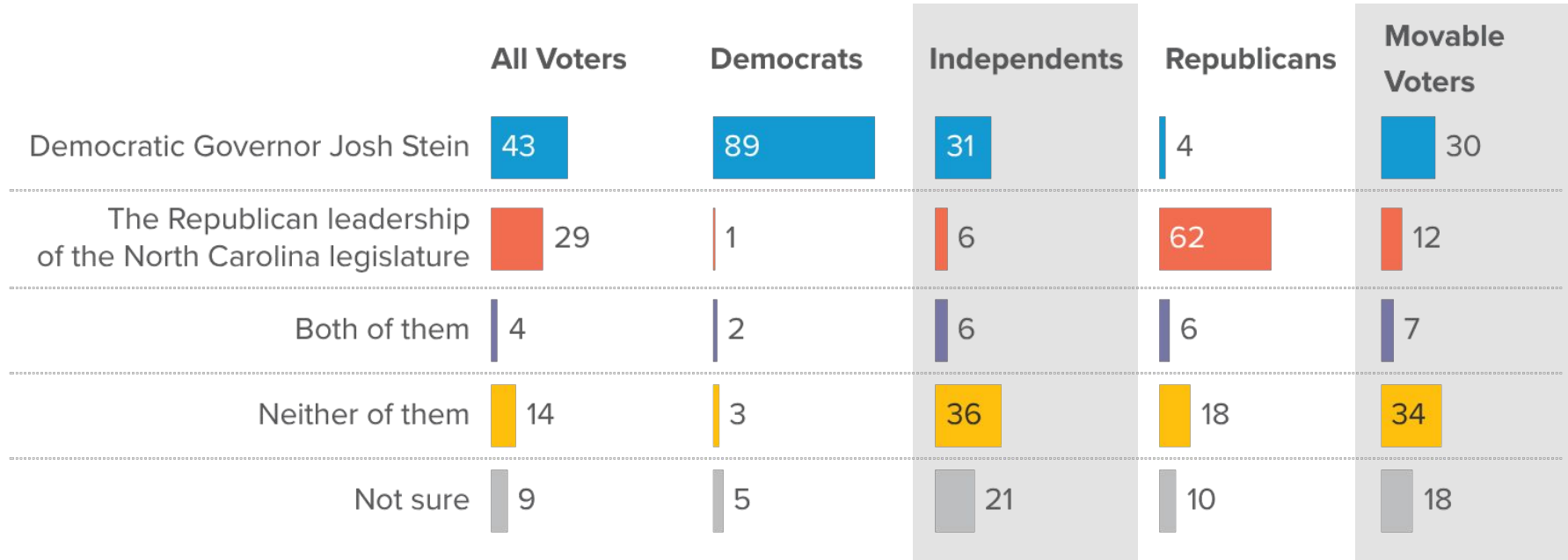
Josh Stein Personal Popularity and Job Approval

Governor Stein is one of the few elected officials to be viewed more favorably than unfavorably and has a solid job approval rating with only a third disapproving. He is above water with Independents, and movable 2026 voters approve of his performance so far.



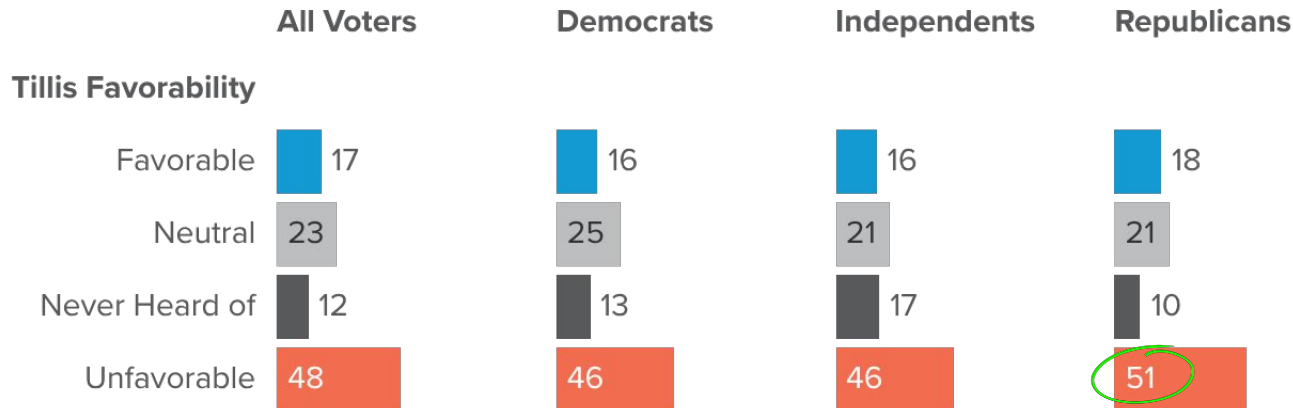
Who Is Trusted More to Govern Fairly and with the People's Best Interests in Mind?

Governor Stein is trusted more than Republicans in the legislature to govern fairly and with the people at the forefront. No one outside of Republicans trust the legislature more.

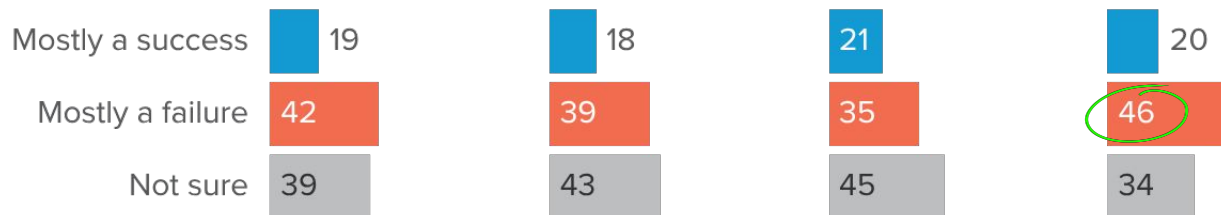


View of Thom Tillis

Senator Tillis – who is leaving office this year – is viewed negatively, and more voters view his time in office as a failure as opposed to a success. Republicans are the harshest in their assessment of him.

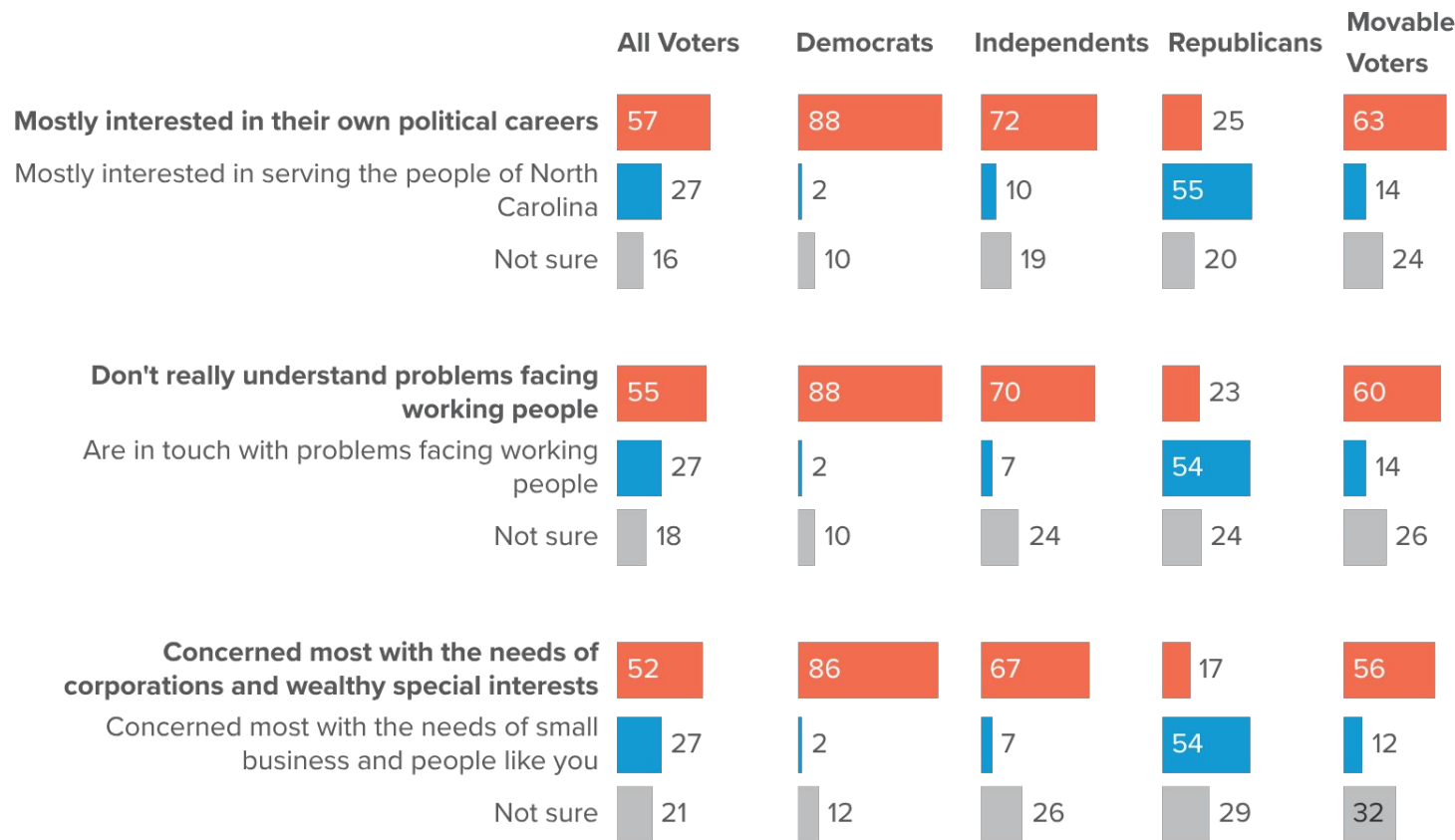


Tillis's Time in the US Senate



Views of the North Carolina Legislature

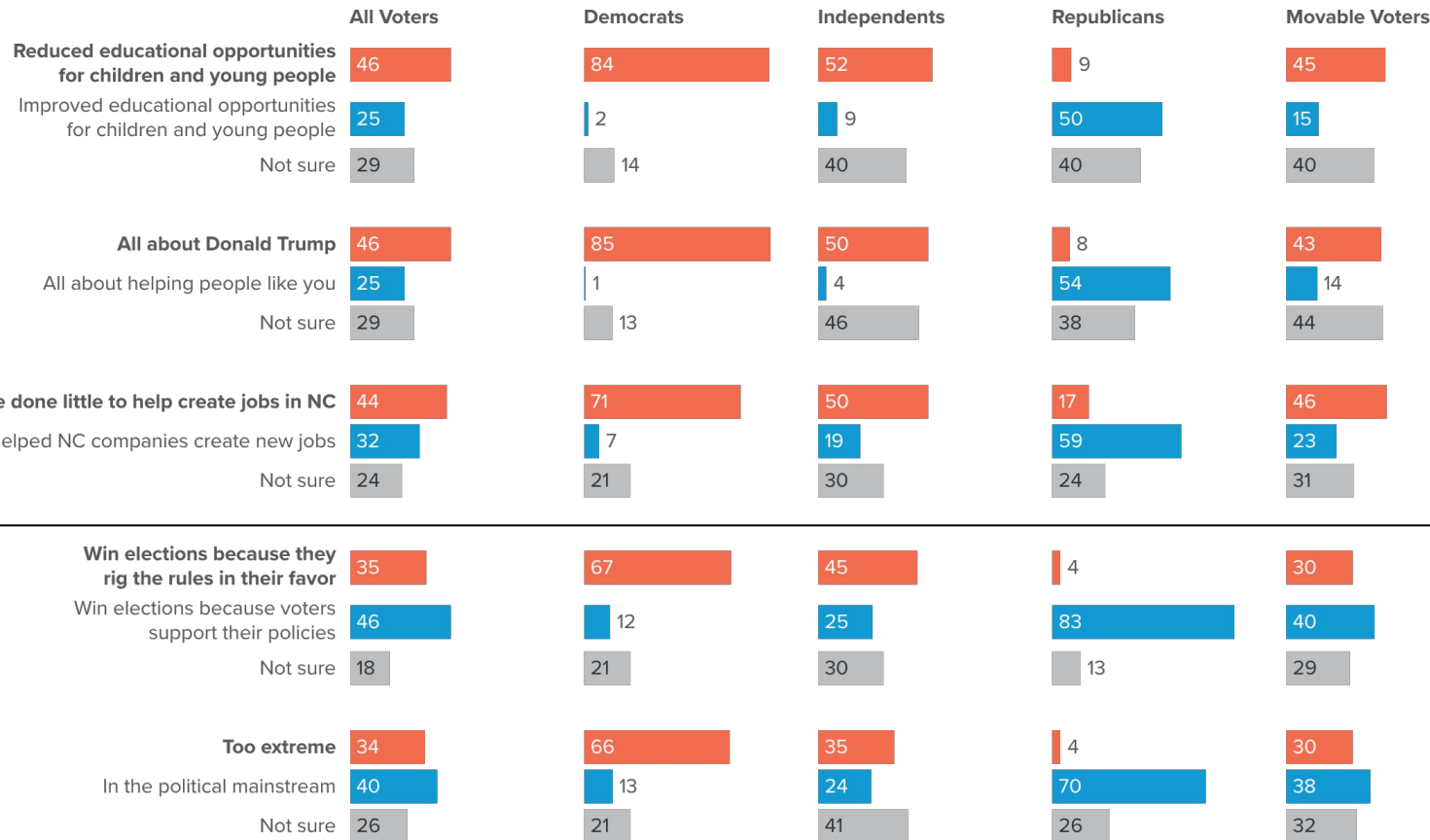
Republicans in the North Carolina legislature are most vulnerable on perceptions of being self-serving, out of touch, and concerned with the needs of the wealthy as opposed to the people of the state.



Views of the North Carolina Legislature

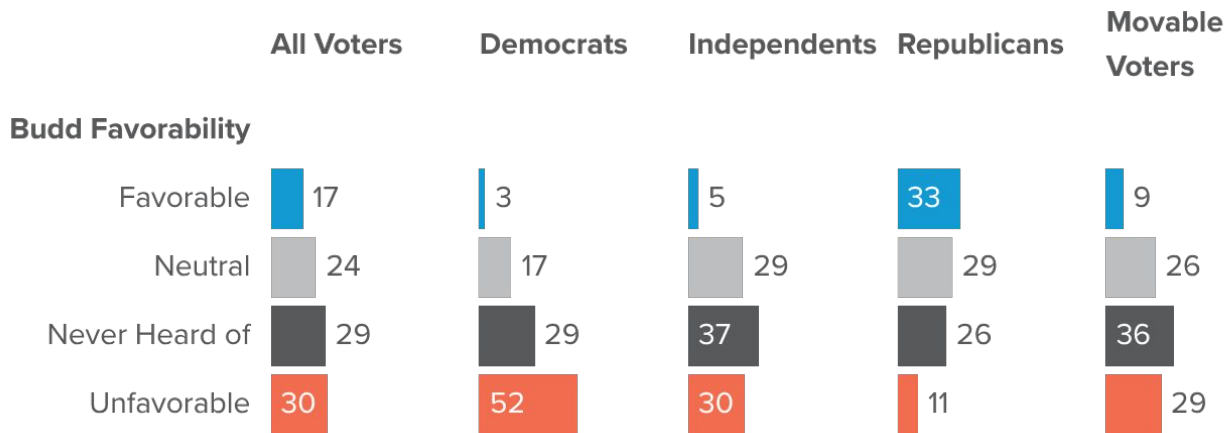


Republicans in the legislature are also seen as not delivering results for children or creating jobs. They are not viewed as extreme or rigging the rules in order to win.

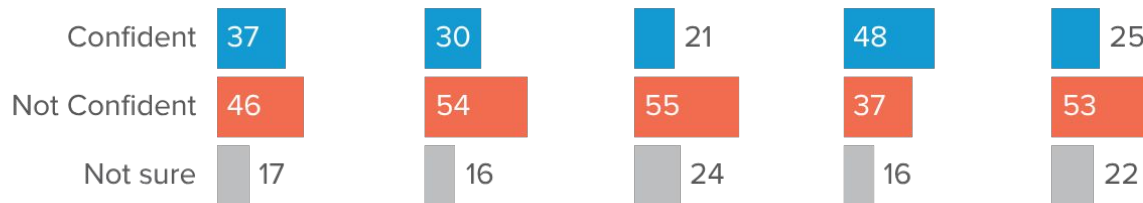


View of Ted Budd

Voters don't have a strong sense of who Senator Ted Budd is. Nearly half do not feel confident they could pick him out of a lineup.



Confidence in Picking Budd Out of a Lineup*



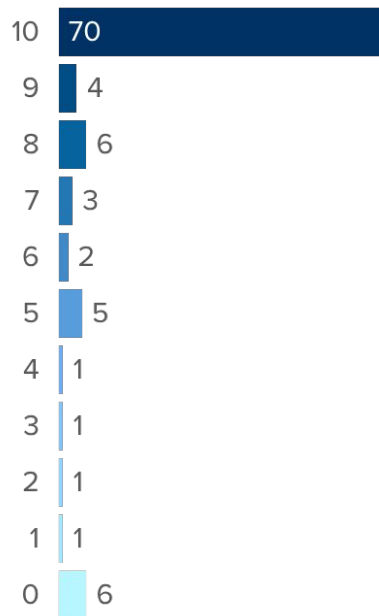
* **Exact wording:** If U.S. Senator Ted Budd was placed in a lineup with 5 other men his age, how confident are you that you could pick him out?

The 2026 Election

Motivation to Vote in 2026

Democrats are currently more motivated to vote in November than Republicans. Those rating their motivation the highest are stronger in their opposition to the President and support of the Governor.

Extremely motivated

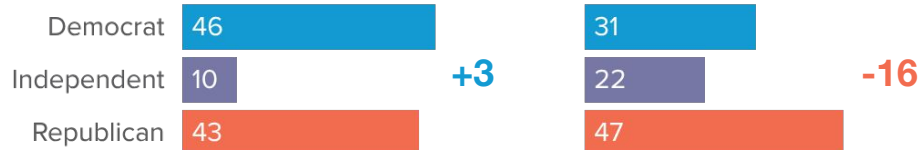


Not motivated at all

10 Motivation

0-9 Motivation

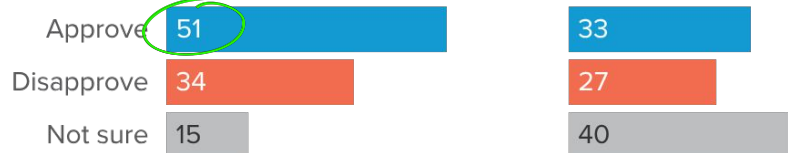
Party ID



Trump Approval

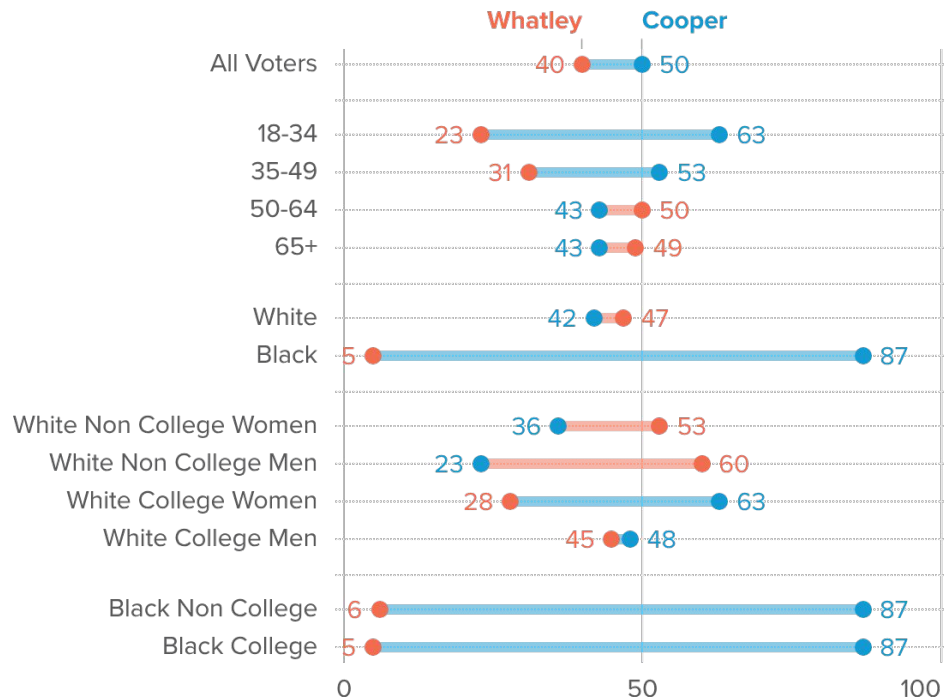
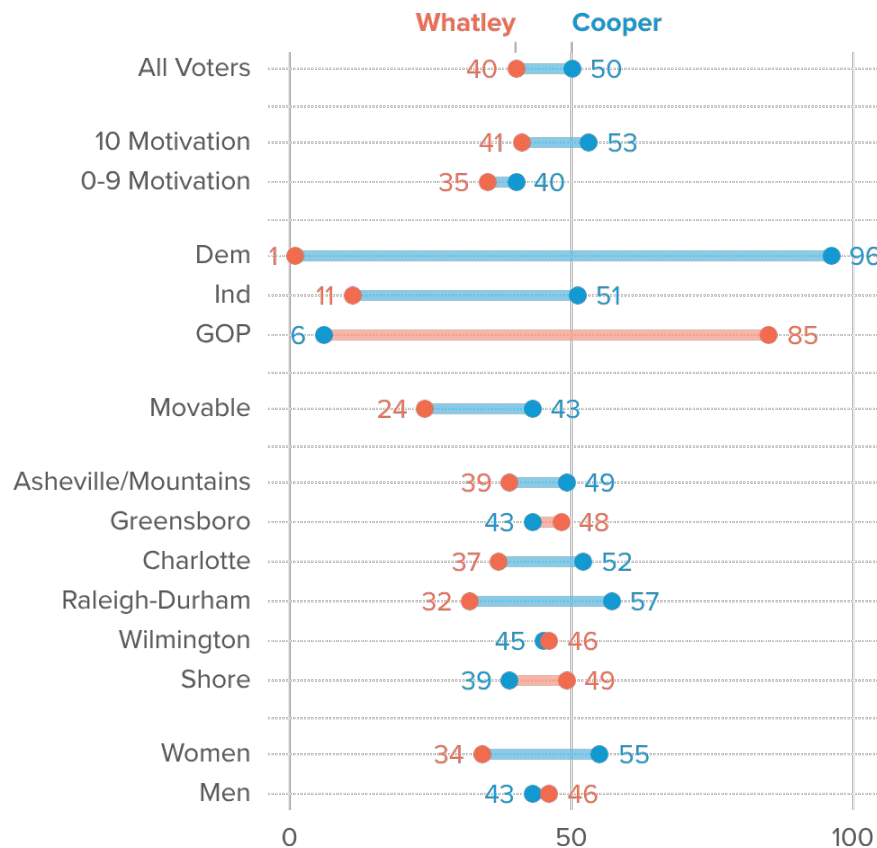


Stein Approval



U.S. Senate Vote

When given descriptions of each candidate, Roy Cooper leads by 10 points and is at 50%.

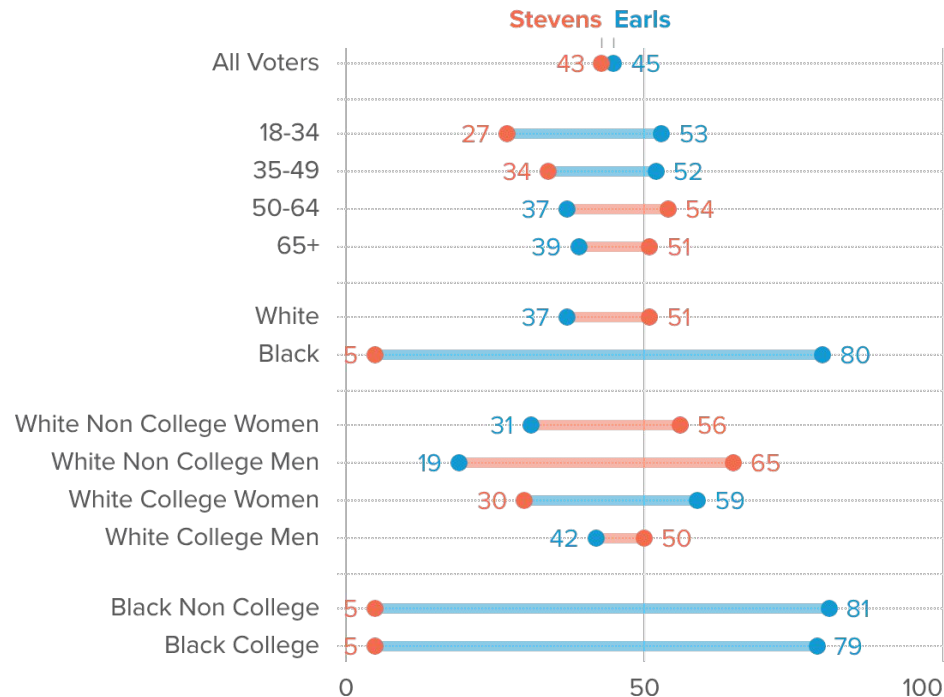
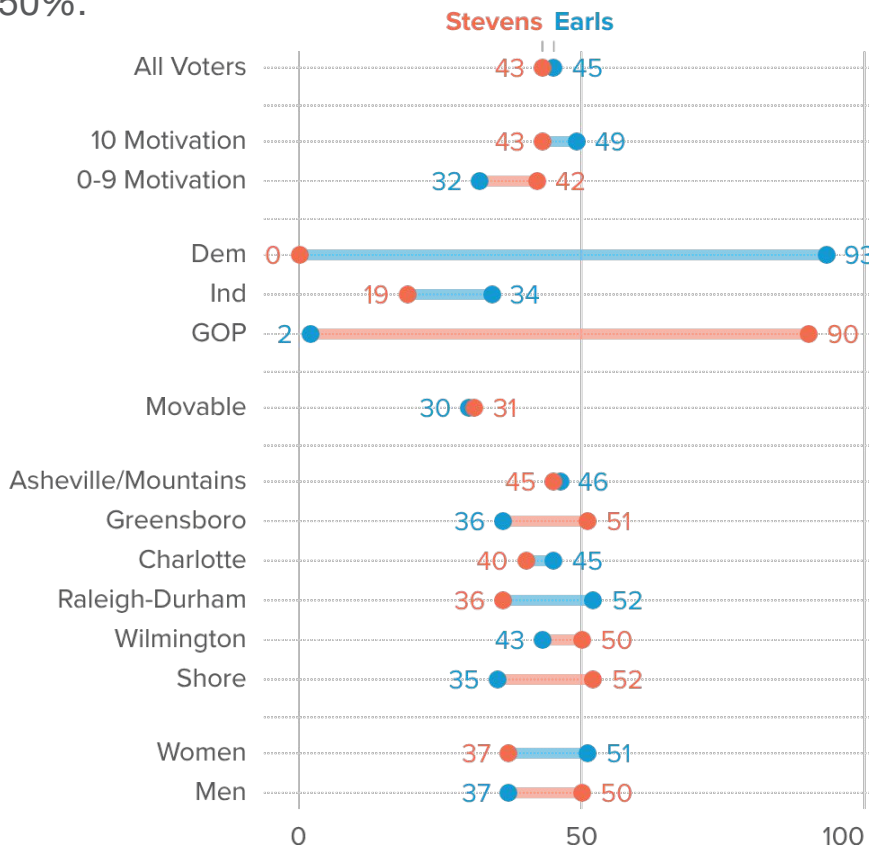


Roy Cooper - the Democrat - governor of North Carolina from 2017 through 2025

Michael Whitley - the Republican - former chairman of the Republican National Committee

North Carolina Supreme Court Vote

When given descriptions of each candidate, the Supreme Court race is a dead heat with neither at 50%.



Anita Earls - the Democrat - a civil rights attorney and an associate justice of the North Carolina Supreme Court since 2019. As Justice, she will continue to uphold the rights enshrined in the North Carolina Constitution — access to healthcare, a sound basic public education, and the right to vote.

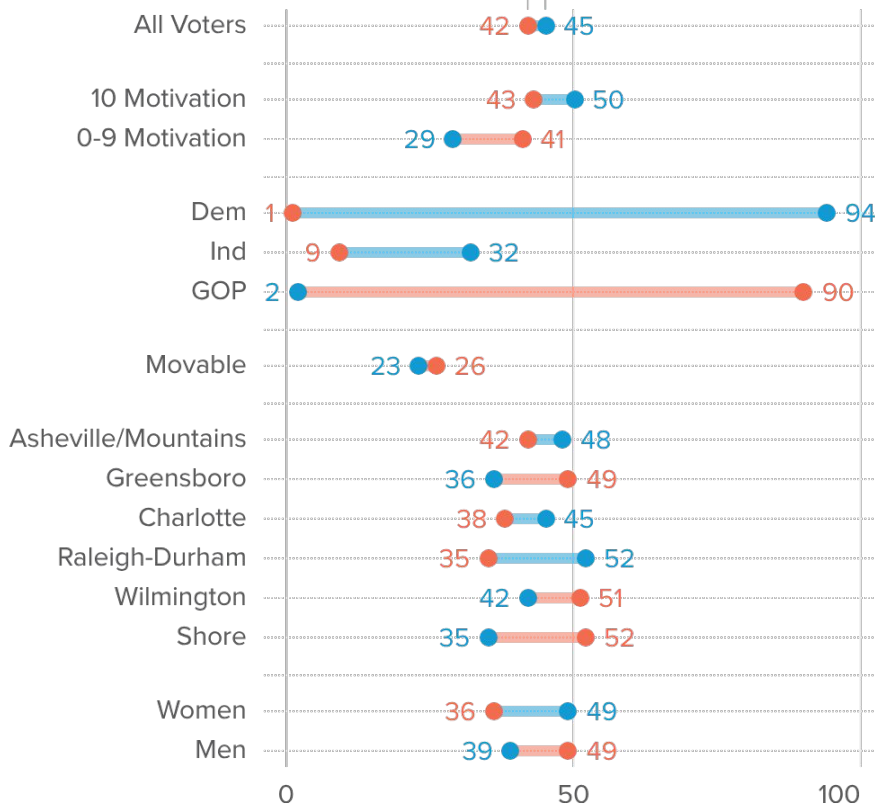
Sarah Stevens - the Republican – has served in the North Carolina House of Representatives since 2009. Stevens believes the law should be applied as written and judges shouldn't create laws from the bench. On the Supreme Court, Stevens will respect our state's constitution and apply the principles of conserving liberty to every case.

Generic State Legislative Vote

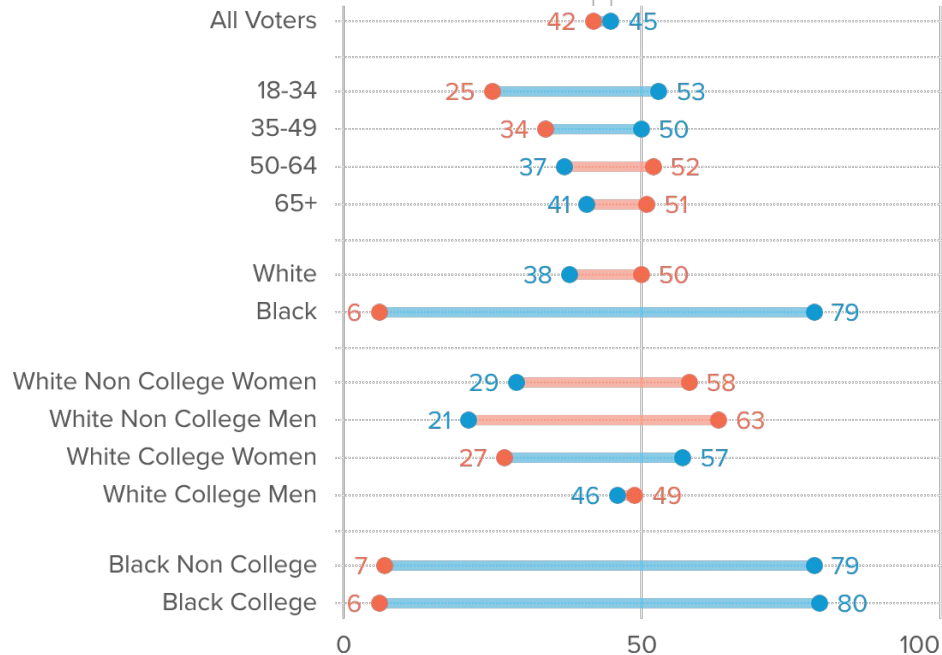
Overall, Democrats have a slight edge for the state legislature overall, but not by enough yet to overcome gerrymandered maps.



Republican Democrat

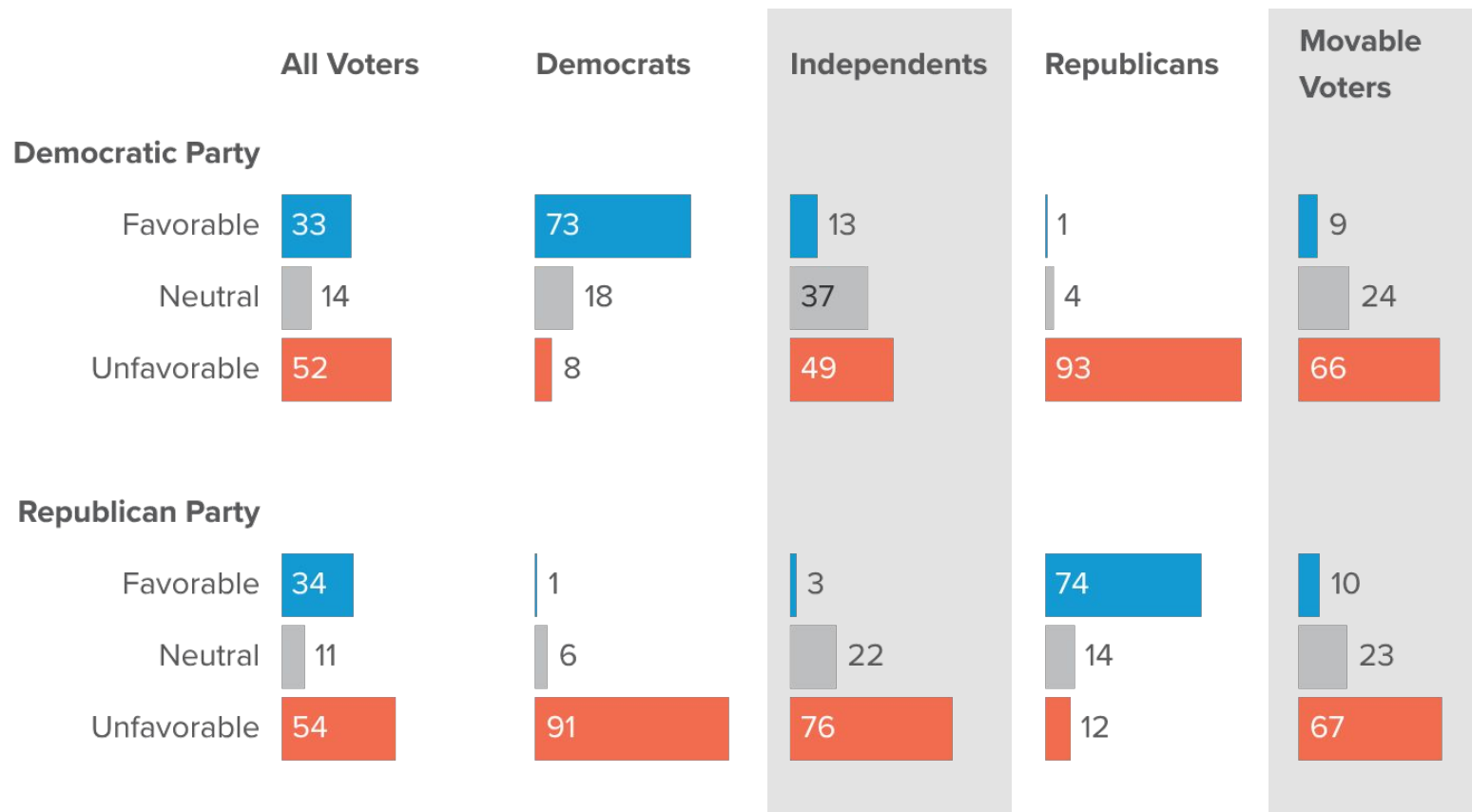


Republican Democrat



Party Favorability

Both parties are viewed unfavorably overall and with Independents.



Persuasiveness of Democratic Messaging

The Democratic message of education, health care, and fighting for everyone's rights and freedoms are most persuasive in turning out Democrats and winning over movable voters.

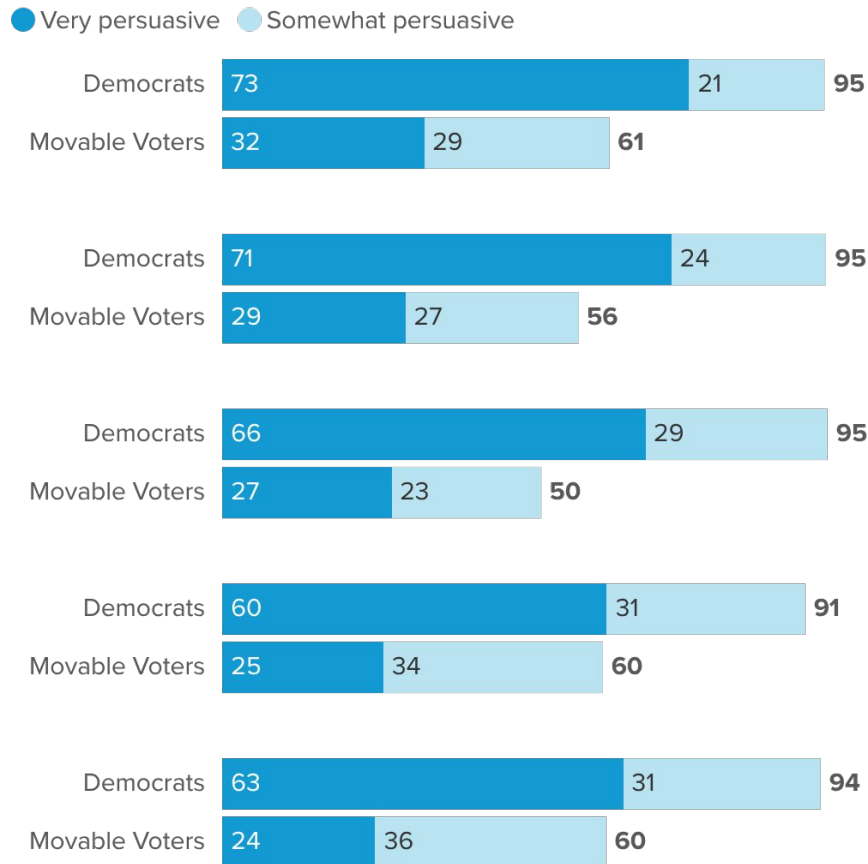
North Carolina Democrats advocate for robust public-school funding, higher teacher pay, and equitable access to quality education. They believe every child deserves the opportunity to succeed, regardless of their background.

North Carolina Democrats are committed to expanding access to affordable healthcare, including the critical expansion of Medicaid. Their goal is to ensure that every North Carolinian has the healthcare they need.

North Carolina Democrats fight for racial and gender equality, voting rights, and criminal justice reform. They believe in creating a just and fair society where everyone is treated with dignity and respect.

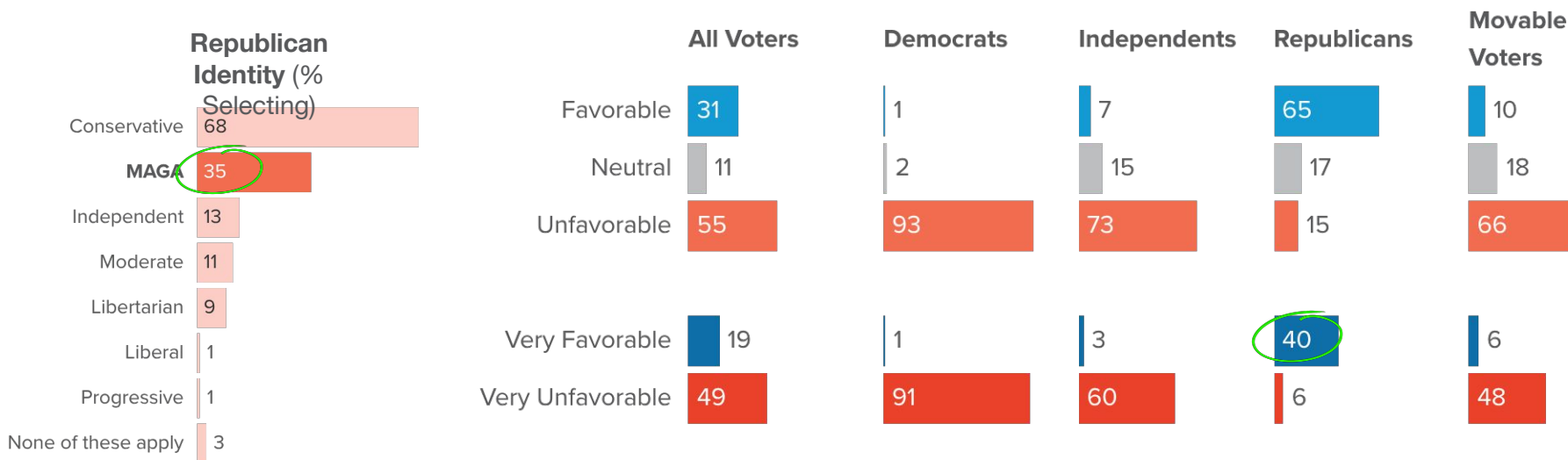
North Carolina Democrats advocate for sustainable environmental practices and the protection of North Carolina's natural resources. Their focus is on creating a healthy environment for current and future generations.

North Carolina Democrats support policies that promote job creation, fair wages, and economic growth across the state. They believe in building a vibrant economy that works for everyone, not just a select few.



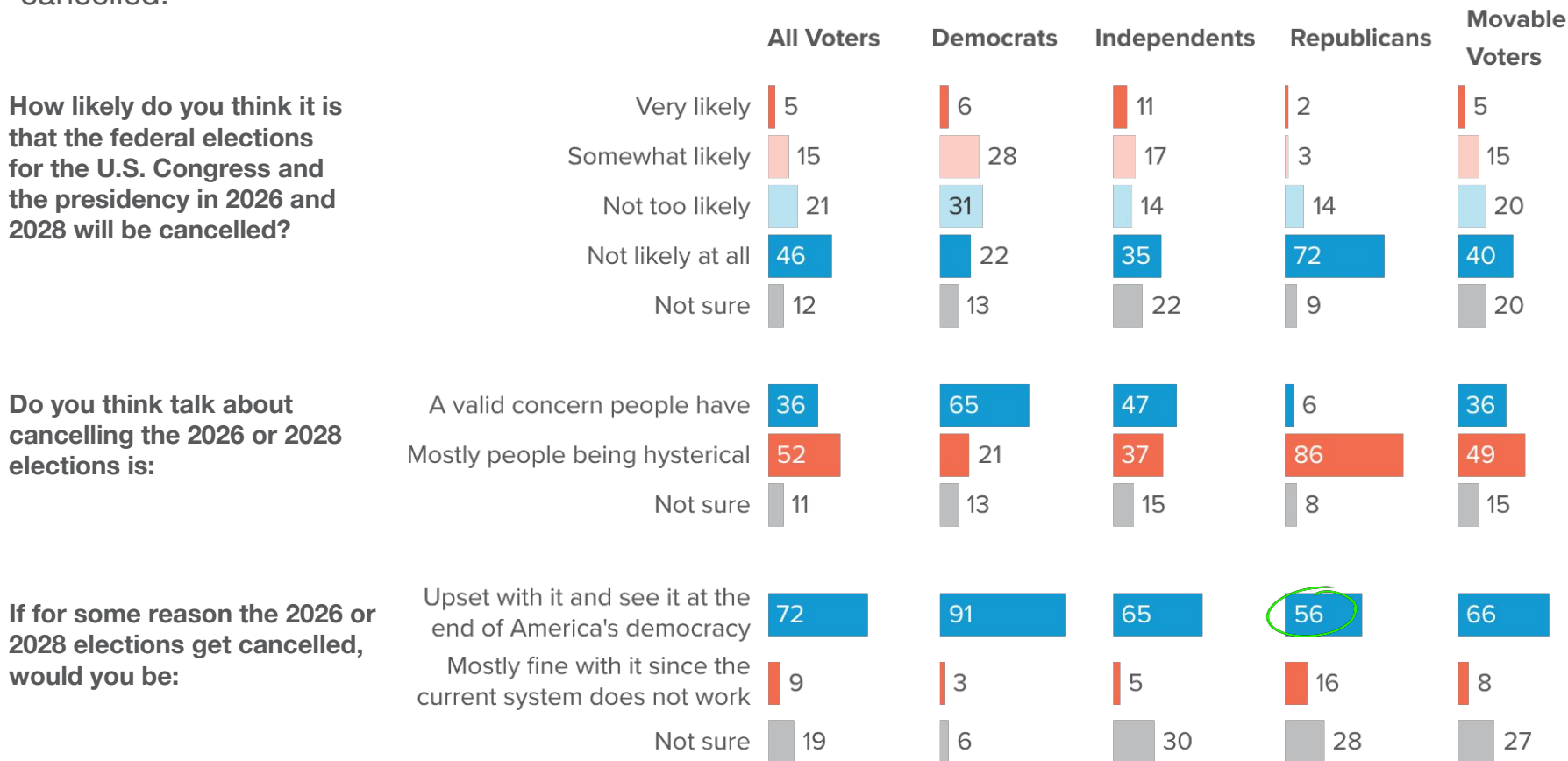
Republican Identity and Favorability of MAGA

Only a third of Republicans identify explicitly as MAGA, and MAGA is viewed unfavorably by Democrats, Independents, and movable voters. Even a third of Republicans don't view MAGA favorably. Democrats should not fear running explicitly against MAGA and MAGA identifying candidates.



Will the 2026 Election Be Held with Integrity?

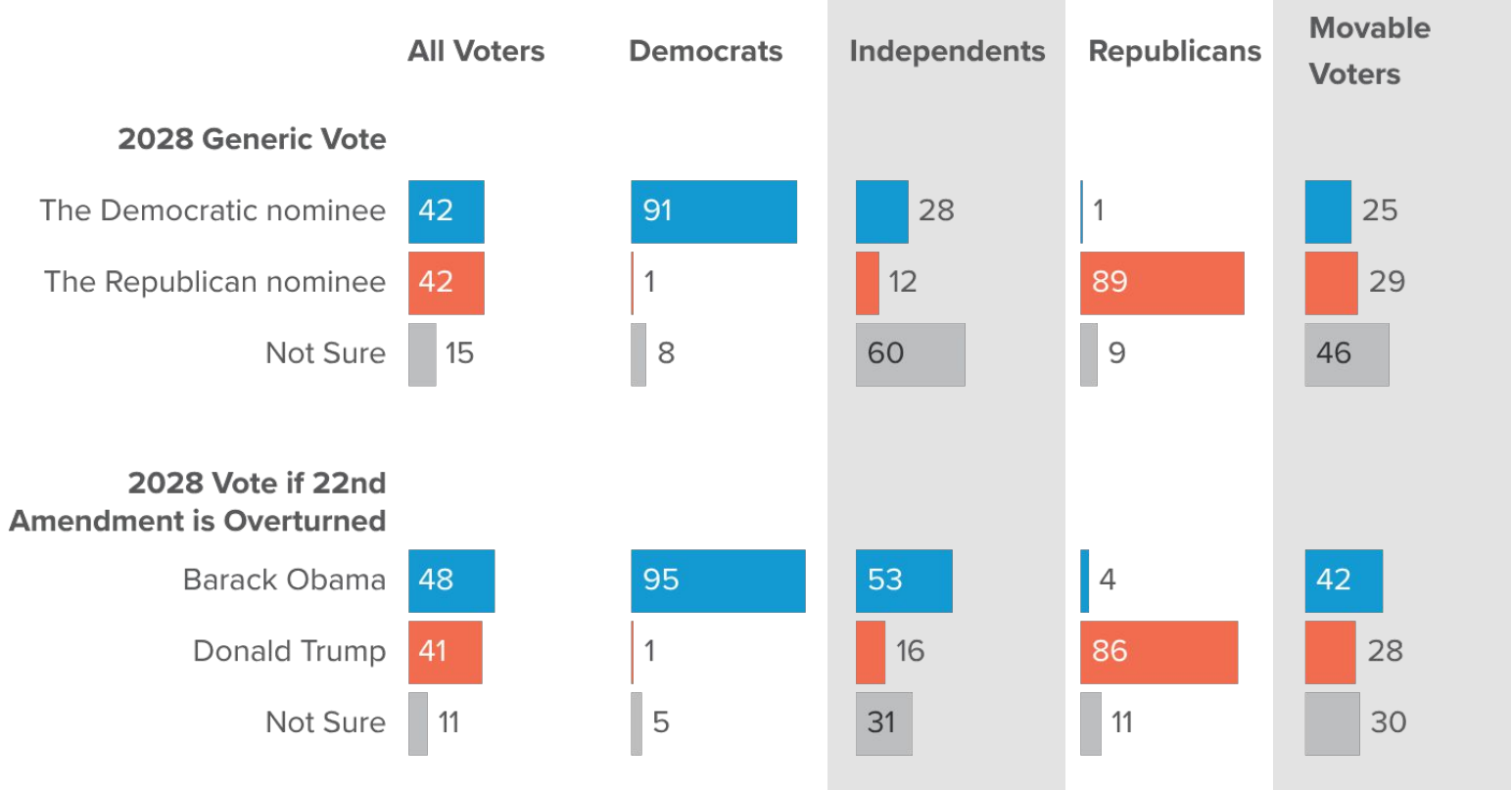
Less than half of voters outright reject the idea that future elections will be cancelled. In a normal world, that would be a 100%. Only 56% of Republicans say they would be upset if the election was cancelled.



The 2028 Election

2028 Vote Matchups

Keeping with North Carolina’s status as one of the few “swing” states in America, neither party has an edge in the 2028 presidential election unless the 22nd Amendment were to be overturned. Barack Obama holds a 7-point lead over Donald Trump if they ran against each other.

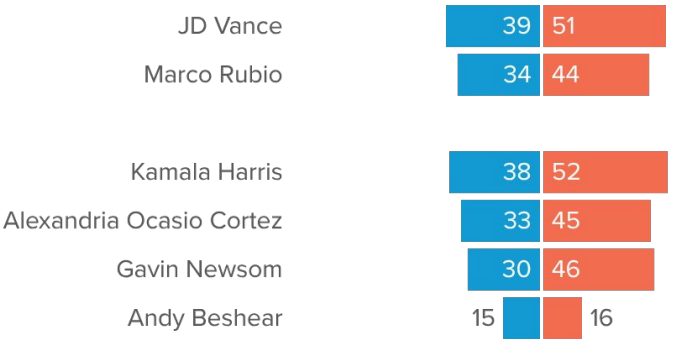


Personal Popularity of Potential 2028 Presidential Candidates

All of the potential candidates in 2028 are viewed more negatively than positively, especially JD Vance and Kamala Harris.

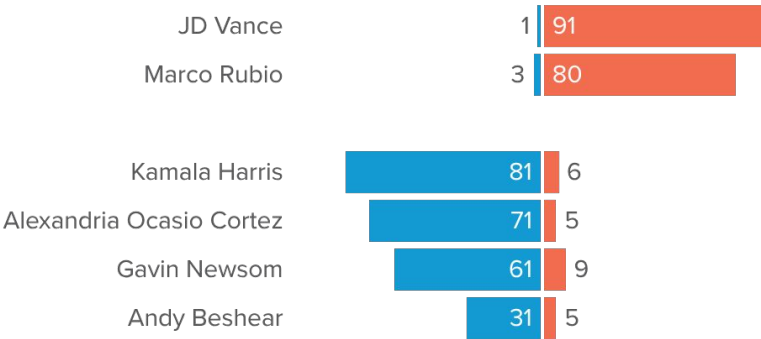
All Voters

Favorable Unfavorable



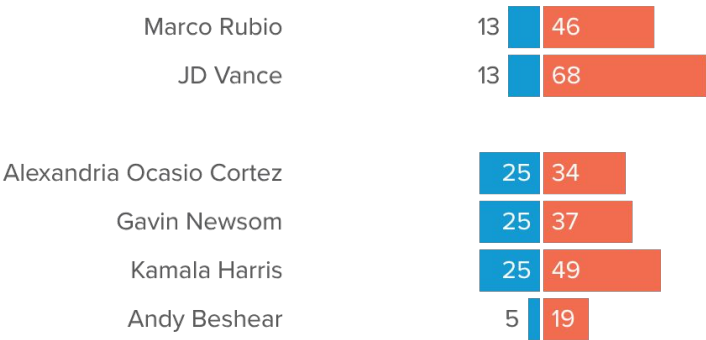
Democrats

Favorable Unfavorable



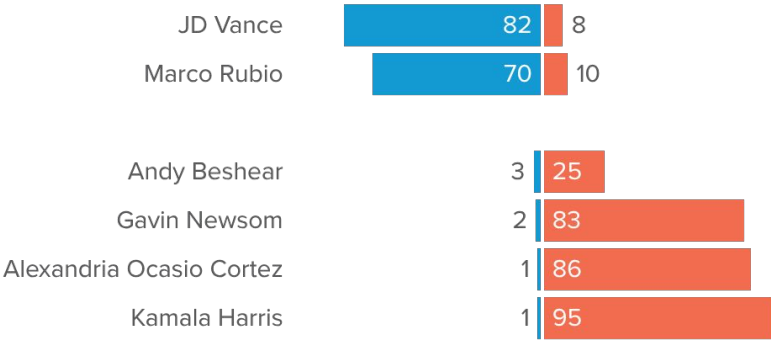
Independents

Favorable Unfavorable



Republicans

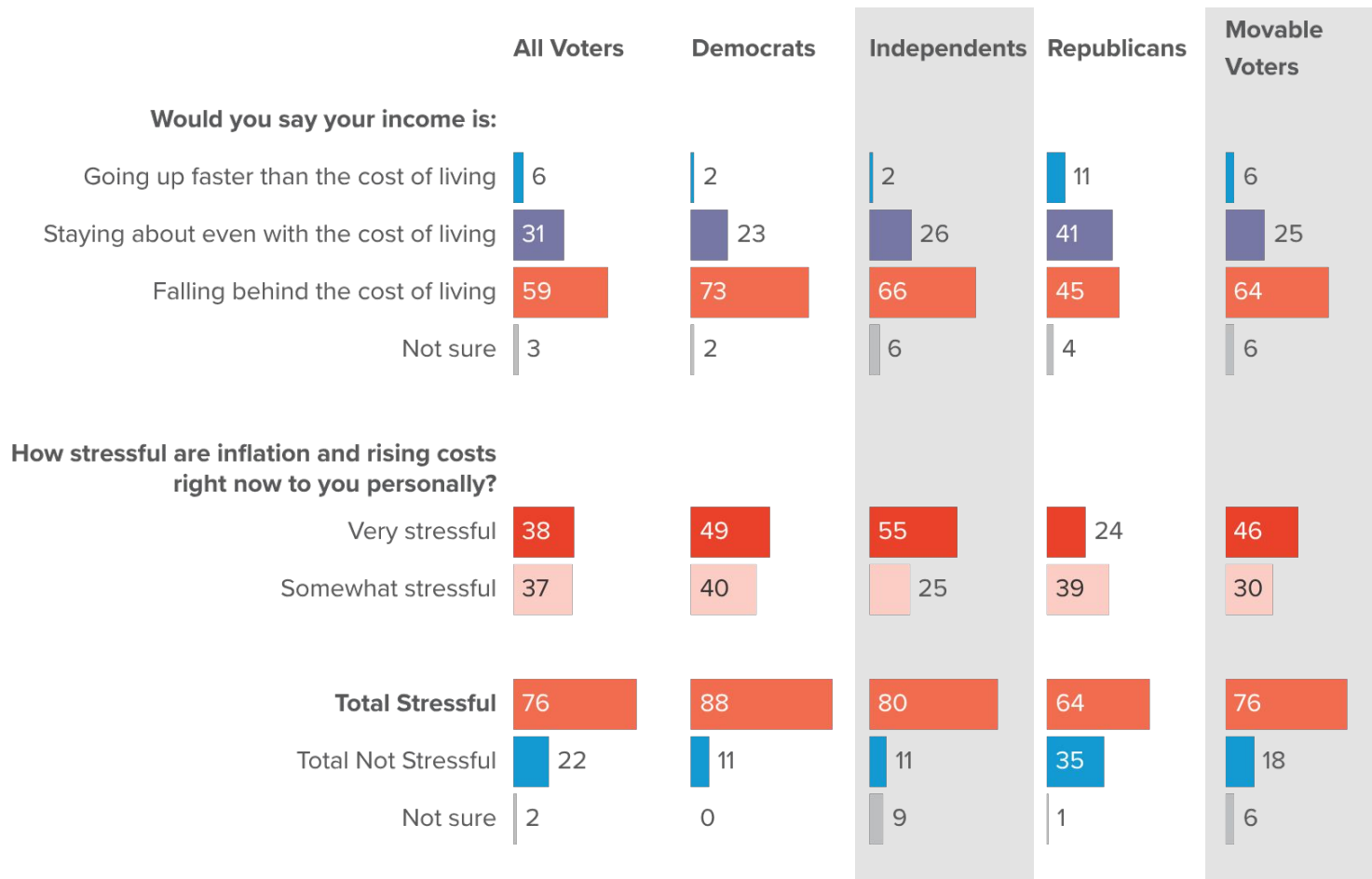
Favorable Unfavorable



The Cost-of-Living Crisis

Perception of Costs

A majority believe their income is falling behind the costs of living and find rising costs stressful.



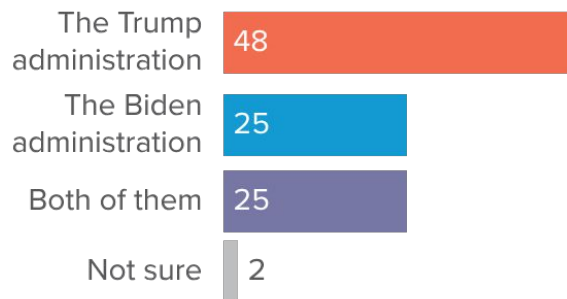
Blame for Rising Costs

Voters blame a variety of national and international factors for the rising costs of living. Those blaming federal government policies are more likely to blame the Trump administration than the Biden one.

	% Selecting				Mov- able
	All	Dem	Ind	GOP	
Inflation and interest rate policies	61	58	53	67	64
Corporate pricing decisions	54	63	63	44	62
Federal government policies	51	69	56	34	57
International factors (e.g. tariffs, global markets)	46	71	56	19	51
State or local government policies	27	19	21	35	24
Supply chain disruptions	25	23	32	25	27
None of these	1	1	5	1	3
Other	13	8	13	19	14



(If federal government policies) **Which presidential administration do you believe is most responsible for the current cost of living?**



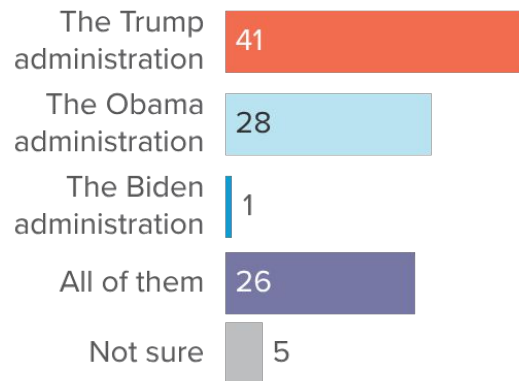
Blame for Health Care Costs

Voters clearly blame health insurance and drug companies for the high healthcare costs. Those blaming the federal government are more likely to blame the Trump administration over the Obama and Biden ones.

	% Selecting				Mov- able
	All	Dem	Ind	GOP	
Health insurance companies	79	80	80	78	78
Drug companies	58	54	64	59	61
Federal government policies	43	58	47	28	51
Hospitals and doctors	15	9	19	19	21
State or local government policies	12	11	16	12	17
Medical malpractice lawyers	11	7	10	14	15
None of these	1	1	5	1	4
Other	8	4	8	11	9



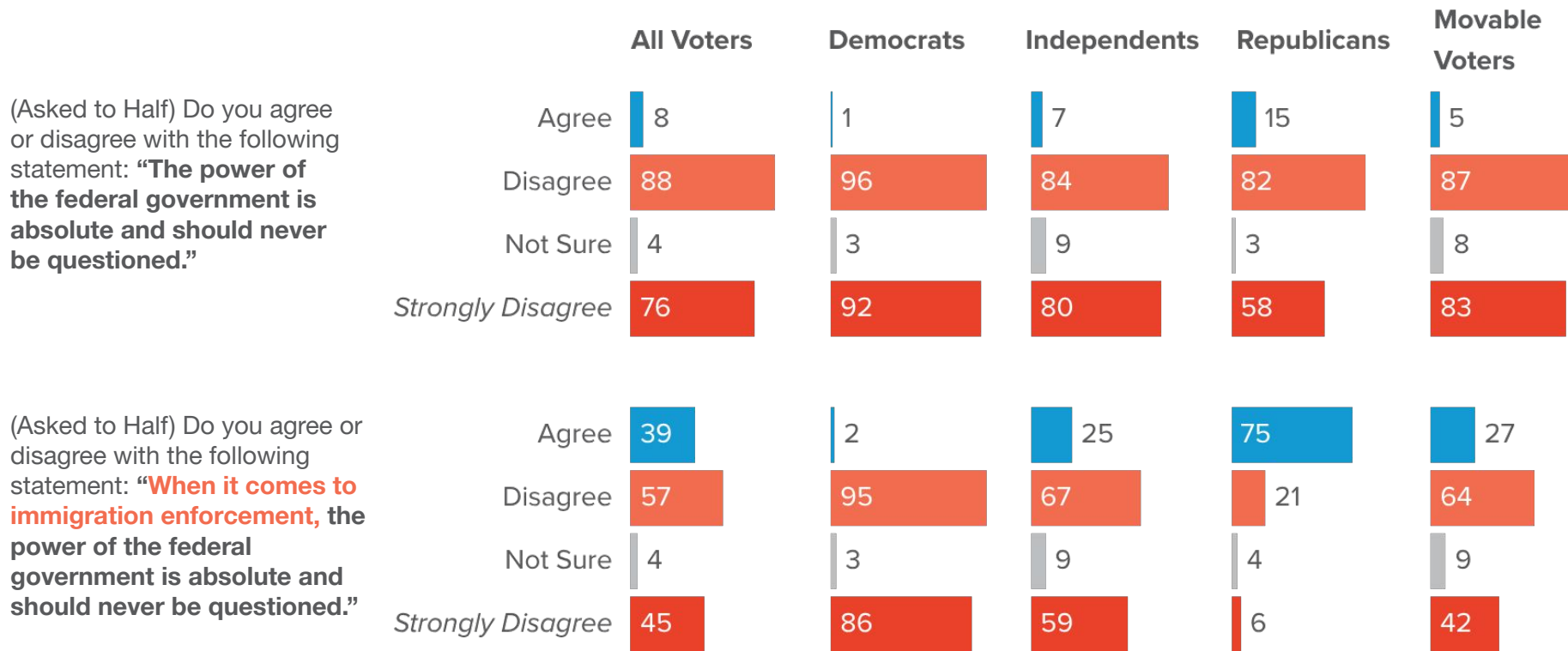
(If federal government policies) **Which presidential administration do you believe is most responsible for the current cost of healthcare?**



Immigration and ICE

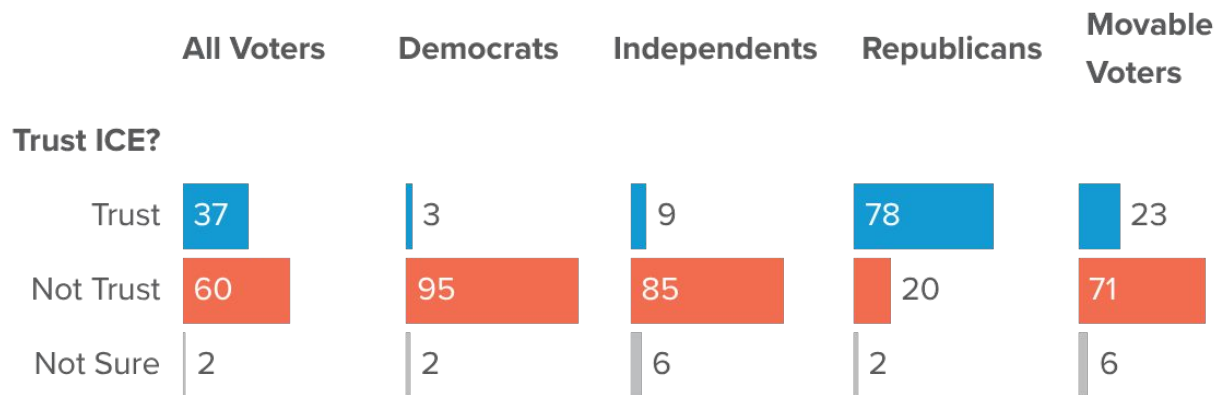
Views on Immigration

Voters outright reject the idea that the federal government should be all powerful – both overall and on immigration.

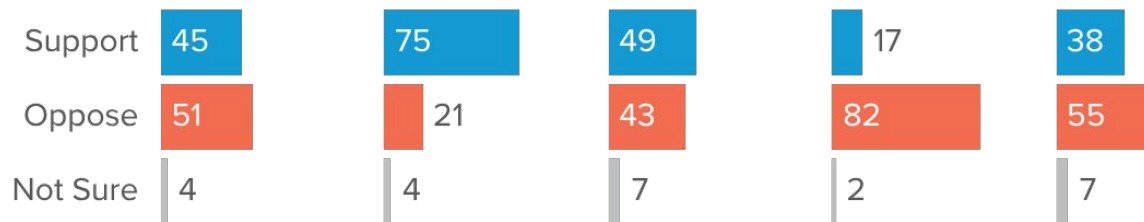


Views on Immigration

60% of voters do not trust ICE, but a majority oppose abolishing it. Movable voters trust ICE even less than voters overall, but do not currently support getting rid of it.



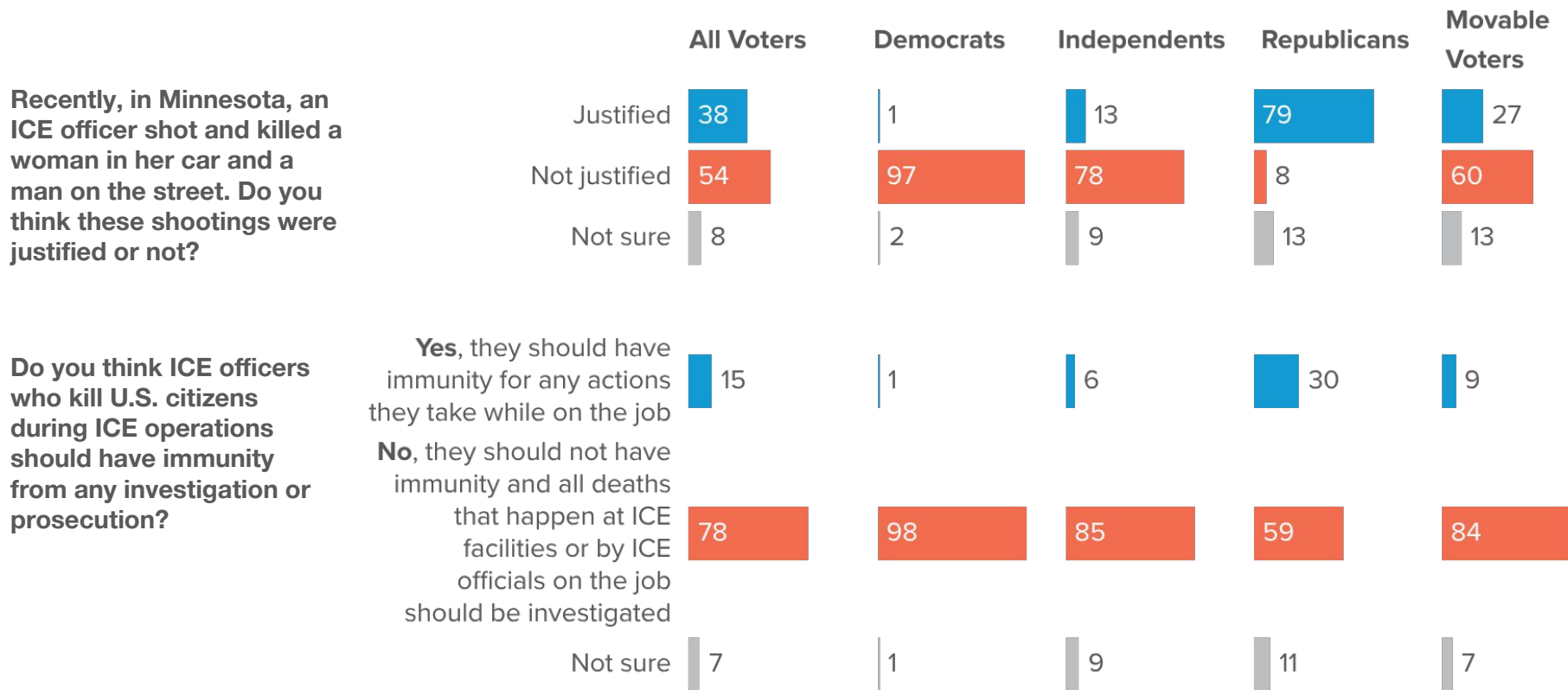
Support for Abolishing ICE



Views on Immigration

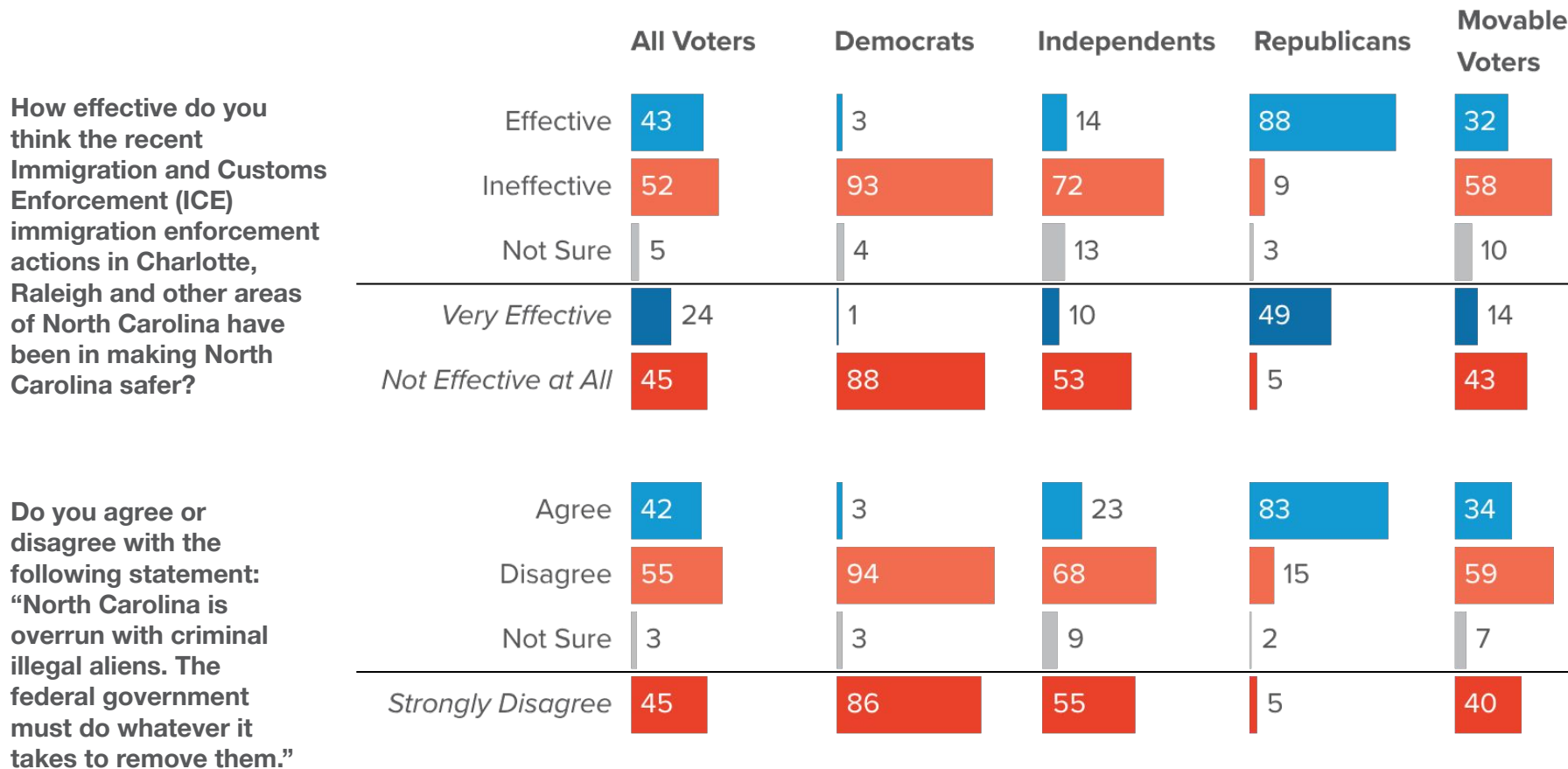


Majorities do not believe the deaths at the hands of ICE officers were justified and they oppose giving officers immunity from prosecution.



Views on Immigration

Majorities do not believe the ICE actions in North Carolina made communities safer and do not believe the state is overrun with criminal illegal aliens.



Concluding Thoughts

Concluding Thoughts

- Donald Trump is underwater in North Carolina. His policies are not popular, voters don't see progress on many fronts, and he would lose if the 22nd Amendment did not exist. Democrats should have no hesitation in challenging the actions and results of the MAGA Republican party that has unified control of Washington and the North Carolina legislature.
- By comparison, Josh Stein is popular and more trusted to deliver for the people of North Carolina. Democrats should aggressively contrast their plans for the state with the results and priorities of the leaders of the legislature.
- Roy Cooper has a clear advantage to build on. All the other races will be a dogfight.
- Long-term, Democrats need to build trust in their ability to make the government work for the people and not the special interests. Younger, less engaged, more movable voters need to see government work for them, and have it reinforced to them which side delivered for them. Without building trust, Democrats will find it harder to compete long-term



North Carolina Voters

1,069 Voters – January 31st-February 4th, 2026