



NORTH CAROLINA VOTER SURVEY

September 2026

FabrizioWard+ **IMPACT**
RESEARCH

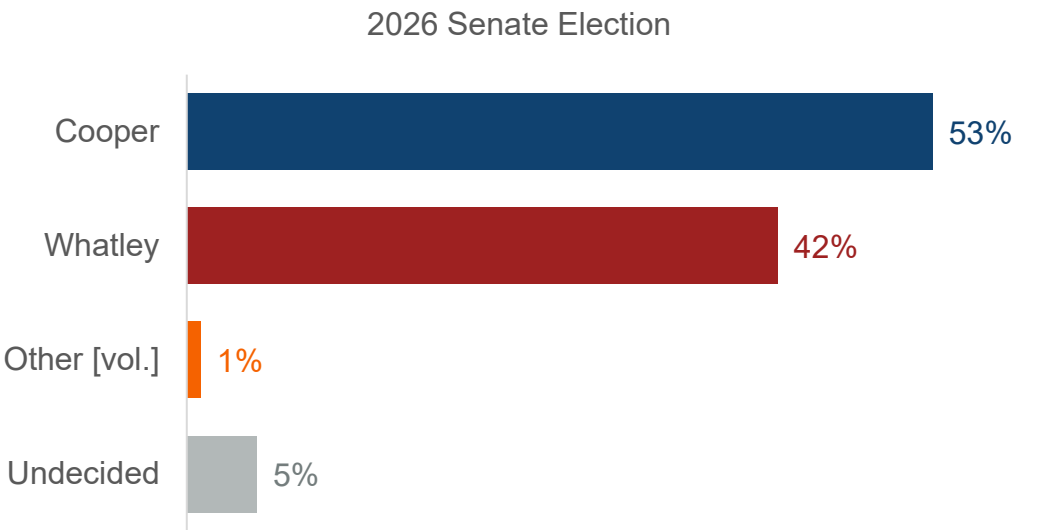


NORTH CAROLINA: BATTLEGROUND STATE

Senate contest

Roy Cooper (D) leads Michael Whatley (R), 53% - 42% in the open seat race for Senate with 5% of voters undecided.

- Cooper has a commanding 39-point lead among voters 18-49 while Whatley has a narrow 6-point lead among voters 50+. Cooper has big leads among both voters 18-34 and 35-49, while Whatley's strongest group are seniors.
- Democrats are a bit more consolidated behind Cooper than Republicans are for Whatley, with Independents favoring Cooper by 25-points, driven by Independents under 50.
- Cooper wins both women and men, though women by a larger margin. Women 50+ are competitive, with Cooper up 3, while men 50+ back Whatley by 16-points.
- Whatley leads white voters and those without 4-year degrees by single-digit margins, while Cooper is up significantly with Black voters and those with 4-year degrees.

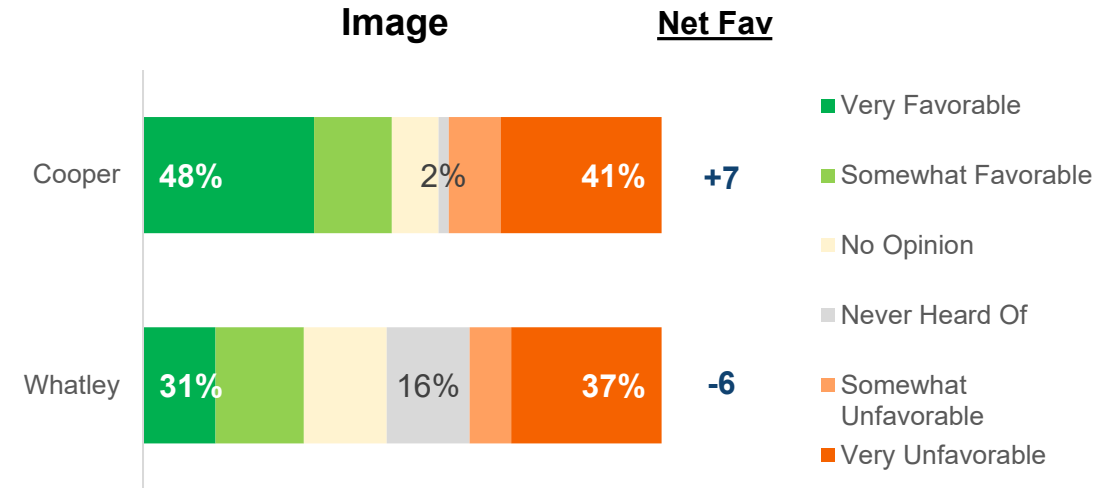


	All likely voters	Voters 18-49	Voters 50+	Voters 18-34	Voters 35-49	Voters 50-64	Voters 65+	GOP	Ind	Dem	GOP 18-49	GOP 50+	Ind 18-49	Ind 50+	Dem 18-49	Dem 50+	Women	Men	Women 50+	Men 50+	White	Black	White 50+	Black 50+	<Coll	Coll +	Care-givers 50+	Swing Voters 50+
Net Cooper	+11	+39	-6	+52	+30	-1	-12	-80	+25	+88	-62	-86	+49	+3	+84	+90	+16	+6	+3	-16	-5	+66	-23	+65	-7	+35	-	+15
Cooper	53	66	45	72	61	47	42	8	58	92	14	6	70	47	90	93	55	51	49	40	45	80	37	81	44	65	48	33
Whatley	42	27	51	20	31	48	54	88	33	4	76	92	21	44	6	3	39	45	46	56	50	14	60	16	51	30	48	18
Other/Und	5	7	4	8	8	5	4	4	9	4	10	2	9	9	4	4	6	4	5	4	5	6	3	3	5	5	4	49

Senate: Images

Roy Cooper's image is in positive territory at 48% - 41%, with nearly 9-in-10 Tar Heel State voters having an opinion of him. Mike Whatley's image is underwater at 31% - 37%, with about 1-in-3 voters not having an opinion of him.

- Cooper is viewed favorably overall due to voters under 50 rating him favorably by a 23-point margin. His image is mixed among voters 50+ with those 50-64 narrowly positive and those 65+ more negative.
- Whatley's image is the reverse, best among those 65+, and underwater among those under 50.
- Independents view Cooper favorably by 13-points and Whatley unfavorably by 20-points.

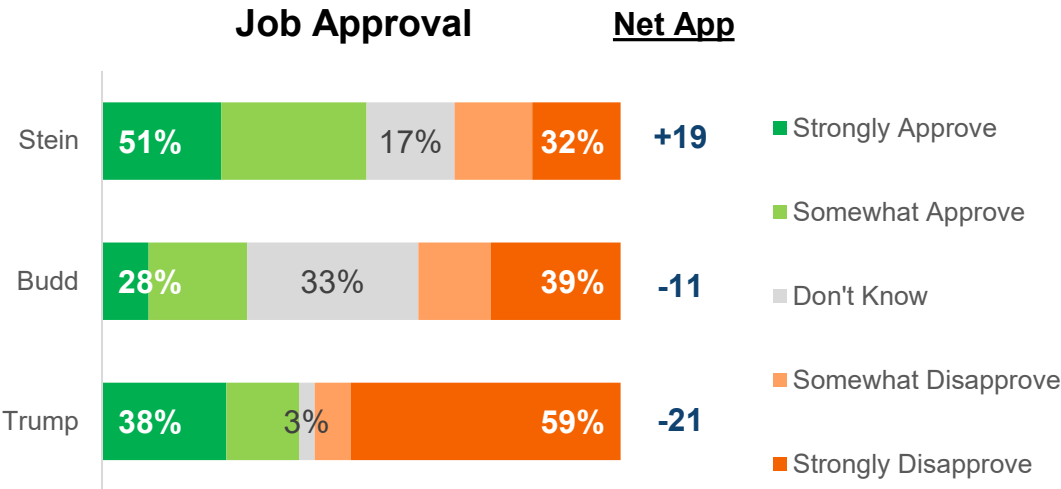


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Cooper Net Fav	+7	+23	-2	+27	+20	+3	-8	-67	+13	+74	-58	-69	+25	+3	+66	+80	+13	+1	+4	-10	-7	+56	-19	+64	-9	+28	+5	-
Favorable	48	54	45	53	54	48	41	12	51	81	13	12	55	48	75	85	50	46	47	42	42	71	37	78	39	60	48	31
Unfavorable	41	31	47	26	34	45	49	79	38	7	71	81	30	45	9	5	37	45	43	52	49	15	56	14	48	32	43	31
Whatley Net Fav	-6	-22	+5	-23	-22	-2	+12	+55	-20	-51	+30	+63	-33	-8	-39	-59	-4	-8	+5	+4	-	-26	+13	-30	+12	-30	+5	-6
Favorable	31	18	40	12	22	37	43	66	22	7	48	72	11	32	9	6	30	33	38	42	37	16	46	18	39	21	39	16
Unfavorable	37	40	35	35	44	39	31	11	42	58	18	9	44	40	48	65	34	41	33	38	37	42	33	48	27	51	34	22

Elected Officials: Job Approvals

Governor Josh Stein’s job approval is solidly positive at 51% approve – 32% disapprove. Voters are less likely to have an opinion of the job Senator Ted Budd is doing, although disapprovers are 11-points higher than those who approve. President Trump’s job approval is underwater at 38% - 59%.

- Stein’s job approval is strong across age groups and net +31 among Independents.
- Budd is underwater with each age group except seniors, with Independents who hold an opinion negative by a 2:1 margin.
- Trump’s job approval is weak among younger voters and Independents, resulting in his overall job approval being negative.

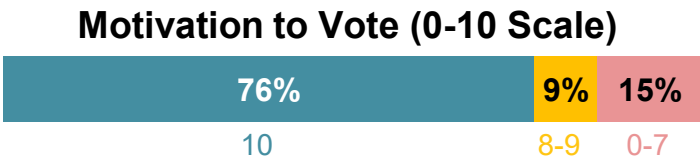


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Stein Net App	+19	+26	+16	+27	+25	+14	+18	-35	+31	+62	-33	-36	+34	+28	+49	+72	+28	+11	+27	+4	+13	+46	+7	+57	+9	+34	+26	+16
Approve	51	52	51	48	55	49	53	24	56	73	23	24	55	57	64	80	55	48	56	45	49	61	47	71	44	60	57	39
Disapprove	32	26	35	21	30	35	35	59	25	11	56	60	21	29	15	8	27	37	29	41	36	15	40	14	35	26	31	23
Budd Net App	-11	-21	-5	-25	-18	-10	+1	+39	-22	-49	+31	+42	-24	-21	-48	-48	-11	-12	-7	-3	-5	-32	+3	-29	-	-25	-3	-1
Approve	28	22	32	18	25	29	35	52	22	11	48	54	19	24	10	12	25	31	28	36	32	16	36	18	32	23	34	26
Disapprove	39	43	37	43	43	39	34	13	44	60	17	12	43	45	58	60	36	43	35	39	37	48	33	47	32	48	37	27
Trump Net App	-21	-58	+2	-67	-53	-7	+12	+72	-45	-86	+42	+81	-75	-17	-95	-80	-26	-15	-6	+12	-6	-70	+18	-60	-3	-45	-2	-23
Approve	38	20	50	15	23	45	55	85	26	6	70	89	11	40	2	9	36	41	46	55	46	13	58	19	47	27	48	29
Disapprove	59	78	48	82	76	52	43	13	71	92	28	8	86	57	97	89	62	56	52	43	52	83	40	79	50	72	50	52

Political environment

More than 3-in-4 likely voters in North Carolina rate themselves a 10 out of 10 as extremely motivated to vote this year. Among voters 50+ that climbs to 83% compared to 66% for voters under 50.

- The range is even bigger between voters 18-34 (57%) and those 65+ (87%).
- Democrats and Republicans are similarly motivated to vote, with Independents, especially younger Independents, lagging their partisan counterparts.
- Just 1-in-3 voters think the country is headed in the right direction, with levels of pessimism highest among younger voters, Democrats, and Independents.
- Most (59%) are worried about their personal financial situation with majorities of each age group worried, though voters under 50 are more likely to say they are worried than voters 50+.

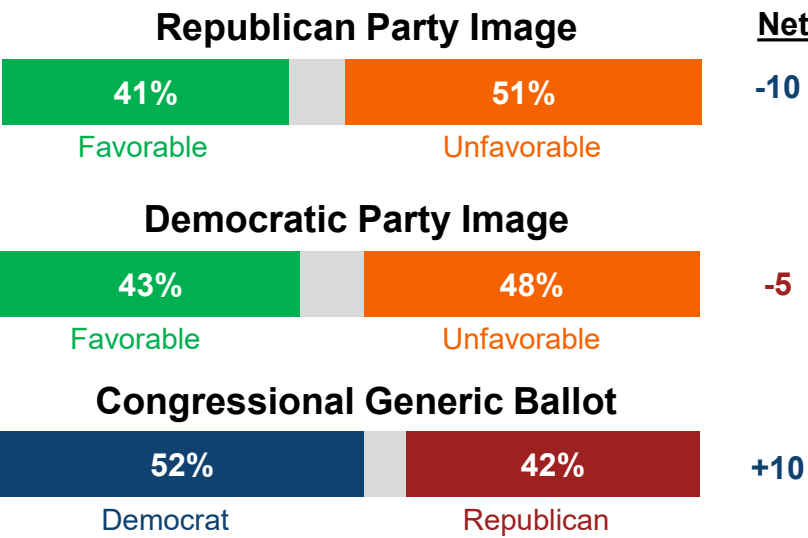


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Motivation: 10	76	66	83	57	72	79	87	80	68	82	65	85	58	76	76	87	75	78	81	85	77	74	84	81	73	80	83	45
% Right Direction	33	16	43	14	17	42	44	71	23	5	51	77	9	37	5	6	29	36	38	49	39	9	50	14	39	24	43	23
% Worried	59	67	54	65	67	55	52	41	64	70	49	39	71	57	71	70	63	53	59	48	53	71	49	66	60	57	59	57

Partisan environment

While both parties are unpopular, the Republican Party is a bit worse off at net -10 favorable compared to the Democratic Party at net -5 among North Carolina voters.

- Big differences by age with voters under 50 sour on the GOP while being narrowly positive on the Democrats.
- Independents are net -31 on the Republican Party, and much less negative (-6) on the Democratic Party.
- Democrats have a 10-point lead on the generic Congressional ballot. Much like on the Senate ballot, this is due to big leads with voters under 50 and Independents.
- Voters 50-64 are a very competitive group on the generic Congressional ballot.



	All likely voters	Voters 18 – 49	Voters 50+	Voters 18-34	Voters 35-49	Voters 50-64	Voters 65+	GOP	Ind	Dem	GOP 18-49	GOP 50+	Ind 18-49	Ind 50+	Dem 18-49	Dem 50+	Women	Men	Women 50+	Men 50+	White	Black	White 50+	Black 50+	<Coll	Coll +	Care-givers 50+	Swing Voters 50+
GOP Net Favorable	-10	-38	+7	-48	-31	-	+15	+82	-31	-79	+62	+89	-47	-17	-83	-75	-10	-10	+5	+9	+3	-52	+20	-45	+8	-34	+5	+2
Dem Net Favorable	-5	+8	-13	+13	+5	-11	-15	-82	-6	+73	-82	-82	+3	-15	+66	+78	+7	-19	-2	-25	-22	+51	-29	+49	-15	+9	-3	-36
Cong Gen: Net Dem	+10	+40	-9	+51	+32	-3	-16	-87	+23	+91	-77	-90	+50	-2	+95	+88	+13	+6	-5	-15	-9	+69	-27	+63	-7	+32	-3	-23



ISSUES DRIVING THE ELECTION

Most important issues (1st + 2nd choice) determining vote

- Rising prices & affordability is the top issue overall and for almost every key subgroup. It is in the top two for more than half of voters under 50 and 40% of those 50+.
- Threats to Democracy is 2nd most often chosen, higher among Democrats.
- Taxes/spending, Immigration, and Social Security/Medicare are tightly bunched in the next tier.
- Social Security & Medicare is the top issue among voters 65+ and comes in 2nd place overall among Black voters and Black voters 50+.
- Swing Voters 50+ are very focused on economic issues with rising prices, taxes/spending, and Social Security/Medicare their three biggest topics.

Q25. Now specifically, from the following list, please tell me which issue is personally most important to you in deciding your vote this November? Q26. And which of the remaining issues would be next most important to you personally in deciding your vote this November?

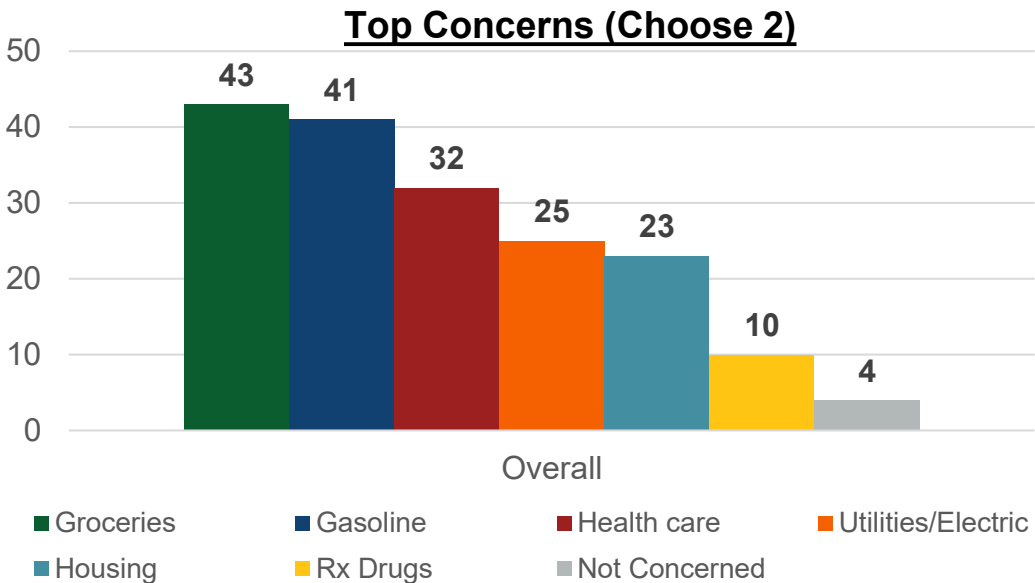
		Voters 18-49	Voters 50+	Voters 18-34	Voters 35-49	Voters 50-64	Voters 65+	GOP	Ind	Dem	Women	Men	Women 50+	Men 50+	White	Black	White 50+	Black 50+	<Coll	Coll +	Swing Voters 50+	Net RC - MW
Rising Prices & Affordability	29% 17% 46%	57	40	56	57	46	33	35	52	51	45	48	40	39	43	56	38	48	46	47	60	+30
Threats To Democracy	18% 10% 28%	26	29	23	29	32	26	20	29	35	28	29	28	30	30	23	29	26	23	35	9	+44
Taxes, Government Spending & Debt	8% 12% 20%	20	20	15	23	20	20	25	23	11	15	25	14	26	22	13	22	12	19	21	35	-20
Immigration & Border Security	10% 9% 19%	12	23	14	11	24	22	40	12	6	16	23	19	27	22	5	27	8	23	13	6	-72
Social Security & Medicare	9% 9% 18%	6	25	5	7	16	35	17	13	24	20	16	28	22	15	31	22	40	21	13	24	+19
Health Care	5% 10% 15%	14	16	11	16	16	16	10	12	23	18	11	20	11	13	25	12	30	16	14	16	+42
Foreign Policy & Military Defense	4% 10% 14%	16	12	18	14	9	16	15	16	9	12	15	13	11	16	6	15	2	13	14	14	+6
Abortion & Reproductive Issues	4% 6% 10%	13	8	18	9	10	6	8	10	11	13	6	8	7	10	7	8	7	8	12	8	--
Crime	3% 5% 8%	5	10	6	5	11	7	13	8	3	9	7	11	8	9	7	10	8	10	5	9	--
The Environment & Climate Change	3% 4% 7%	11	5	17	6	4	5	1	9	11	9	5	6	4	7	4	5	-	5	10	1	--
Jobs	2% 4% 6%	9	5	7	11	4	5	4	7	8	6	7	3	6	4	14	2	13	6	7	9	--
Gun Control/Gun Rights	2% 3% 5%	7	5	8	6	6	3	6	4	6	5	6	4	6	4	7	4	6	7	3	6	--

■ First ■ Second □ Combined

Top Concerns on Rising Prices & Affordability

Groceries and Gasoline are the top concerns on rising prices and affordability. This is true for both voters 18-49 and 50+.

- Groceries are narrowly the top concern for most, but not all groups.
- Among voters 18-34, Housing takes the top spot.
- Health care and utilities are the 3rd and 4th biggest concerns both overall and among voters 50+.



Q28. Which two of the following are you most concerned about in regard to rising prices and affordability? If you are not concerned about any rising prices, please just say so.

	All likely voters	Voters 18 – 49	Voters 50+	Voters 18-34	Voters 35-49	Voters 50-64	Voters 65+	GOP	Ind	Dem	Women	Men	Women 50+	Men 50+	White	Black	White 50+	Black 50+	<Coll	Coll +	Care-givers 50+	Swing Voters 50+	RP & Afford: Top 2 Issue
Groceries	43	46	42	41	49	41	43	40	47	44	45	42	43	41	44	38	43	37	43	45	46	47	52
Gasoline	41	42	40	38	44	39	41	39	40	43	40	42	39	41	40	45	39	45	43	38	39	51	49
Health care	32	29	34	27	30	38	29	27	32	37	33	30	37	30	32	30	33	33	29	35	37	22	28
Utilities, like electricity	25	27	25	24	29	23	27	32	23	22	26	24	26	23	27	20	26	21	26	25	26	16	22
Housing	23	33	16	45	25	19	12	14	27	26	23	22	18	13	20	30	15	20	21	25	16	23	27
Prescription drugs	10	6	12	6	6	11	14	10	8	12	11	9	13	11	10	10	13	11	12	7	13	15	7

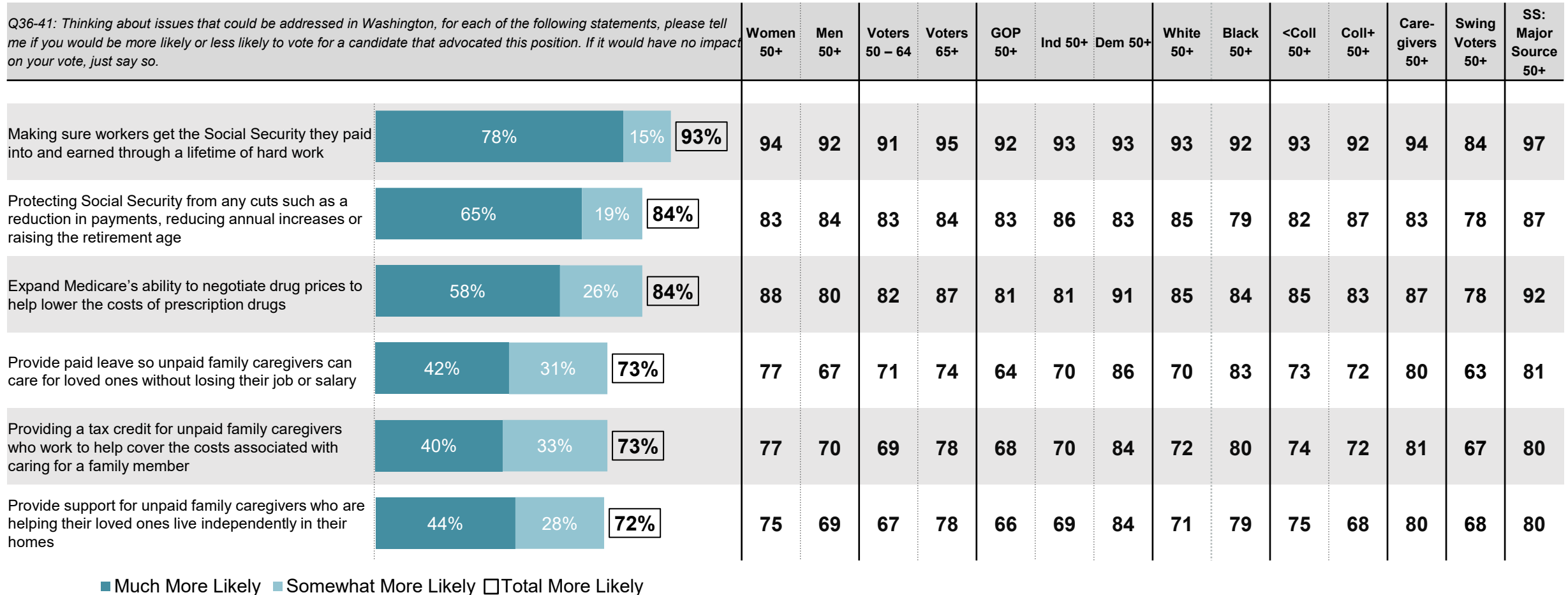
Key issues for voters 50+

- Voters 50+ place a very high level of importance on key issues like Social Security, the cost of health care, rising prices on everyday essentials, and Medicare. These issues matter whether a voter is a Republican, Democrat or Independent, and across demographic lines.
- Notably, the Senate race is very competitive among the voters who say each of these issues are extremely or very important.

Q30-35. Please tell me how important each of the following issues are when deciding your vote this November: extremely important, very important, somewhat important, not too important, or not at all important.		Women 50+	Men 50+	Voters 50 – 64	Voters 65+	GOP 50+	Ind 50+	Dem 50+	White 50+	Black 50+	<Coll 50+	Coll+ 50+	Care-givers 50+	Swing Voters 50+	SS: Major Source 50+	Net RC - MW
Social Security	52% 31% 83%	86	80	81	86	80	85	86	81	90	86	79	87	75	93	-1
Cost of health care	49% 33% 82%	88	74	84	79	74	83	90	80	89	82	81	86	79	89	+6
Rising prices for everyday essentials, like groceries and gasoline	48% 34% 82%	85	78	82	82	73	82	92	79	92	83	80	85	88	89	+8
Medicare	46% 31% 77%	84	68	72	82	71	76	85	74	85	80	71	83	70	89	+5
Policies to help seniors live independently at home as they age	38% 34% 72%	76	67	66	78	70	68	79	70	80	76	65	80	65	83	-
Cost of prescription drugs	38% 31% 69%	77	61	70	68	64	66	80	67	79	74	63	77	77	78	+8
Extremely Important Very Important Combined																

Protecting voters 50+ — Federal issues

- A candidate running on protecting Social Security, expanding Medicare’s prescription drug negotiation ability, and aiding family caregivers gets a sizable boost among voters 50+ in North Carolina, with benefits apparent across the political spectrum.

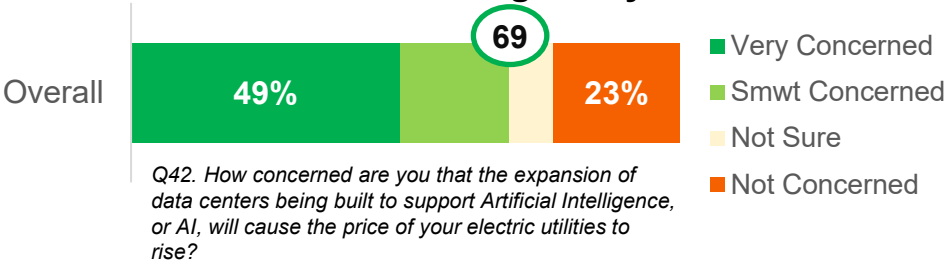


Protecting North Carolina voters 50+ — Utilities

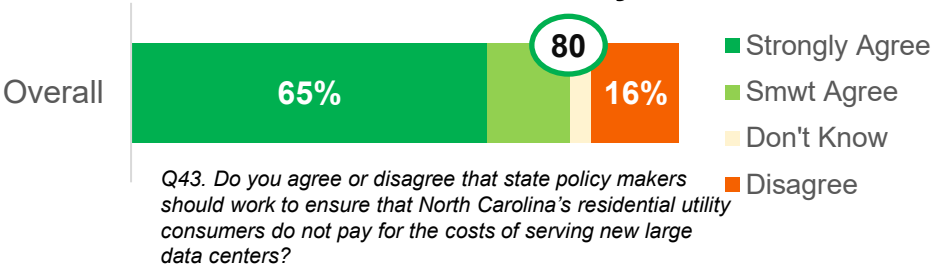
4-in-5 North Carolina voters 50+ agree that policymakers should work to ensure residential utility customers do not pay the costs of serving large data centers, with 65% strongly agreeing.

- Agreement is very high across every major group.
- Additionally, 69% are concerned that expansion of data centers will cause the price of their electric utilities to rise.

Concern on Data Centers Causing Utility Prices to Rise



Policymakers Ensure Consumers Don't Pay Data Center Costs



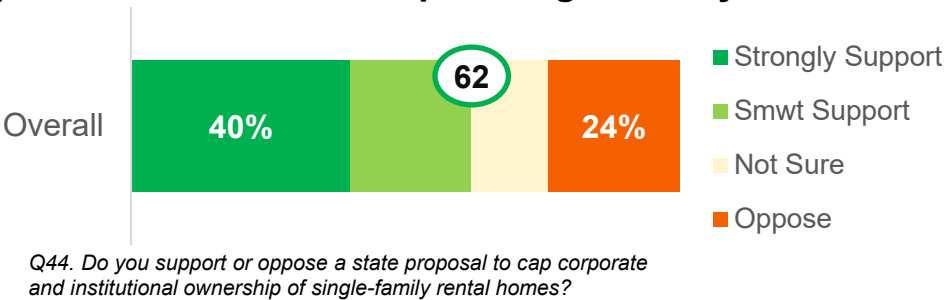
Voters 50+	All voters 50+	Women 50+	Men 50+	Voters 50 – 64	Voters 65+	GOP 50+	Ind 50+	Dem 50+	White 50+	Black 50+	<Coll 50+	Coll + 50+	Swing Voters 50+
% Concerned	69	72	65	70	68	59	69	81	65	83	67	71	68
% Agree	80	81	79	82	77	78	81	81	80	80	78	83	66

Protecting North Carolina voters 50+ — Housing

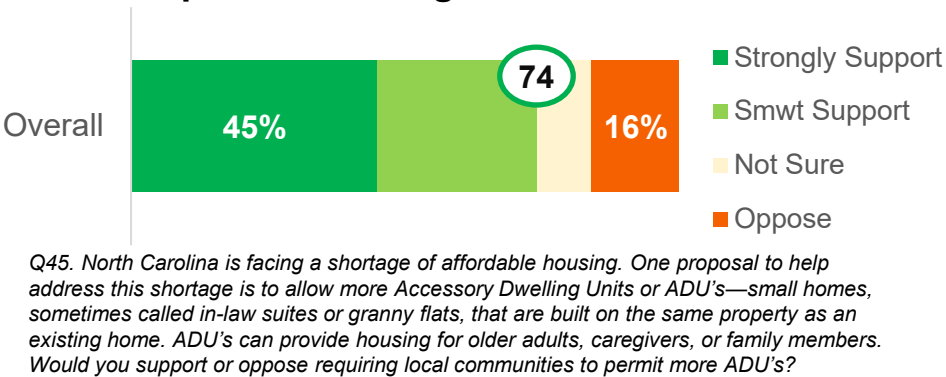
There is support for requiring the permitting of more ADUs to address a shortage of affordable housing. 74% of voters 50+ back this idea including 45% strongly.

- Another popular item among voters 50+ in North Carolina is to cap the corporate or institutional ownership levels of single-family rental homes, with 62% of voters 50+ in support.

Cap Institutional Ownership of Single-Family Rentals



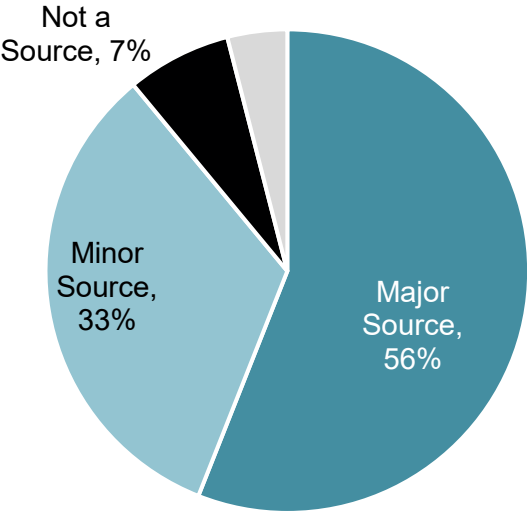
Require Permitting of More ADUs



Voters 50+	All voters 50+	Women 50+	Men 50+	Voters 50 – 64	Voters 65+	GOP 50+	Ind 50+	Dem 50+	White 50+	Black 50+	<Coll 50+	Coll + 50+	Swing Voters 50+
% Support Institutional Ownership Cap	62	60	64	68	55	59	61	67	63	58	58	68	59
% Support Permitting More ADUs	74	81	66	74	73	69	68	86	72	80	74	73	61

Importance of Social Security

- A 56% majority of North Carolina voters 50+ say Social Security is or will be a major source of income for their household.
- This figure is even higher among women 50+ and voters 65+, whose households are more likely to already be on Social Security.



Q48. Is Social Security now, or do you expect it to be, a major source of income for your household, a minor source of income for your household, or not a source of income for your household?

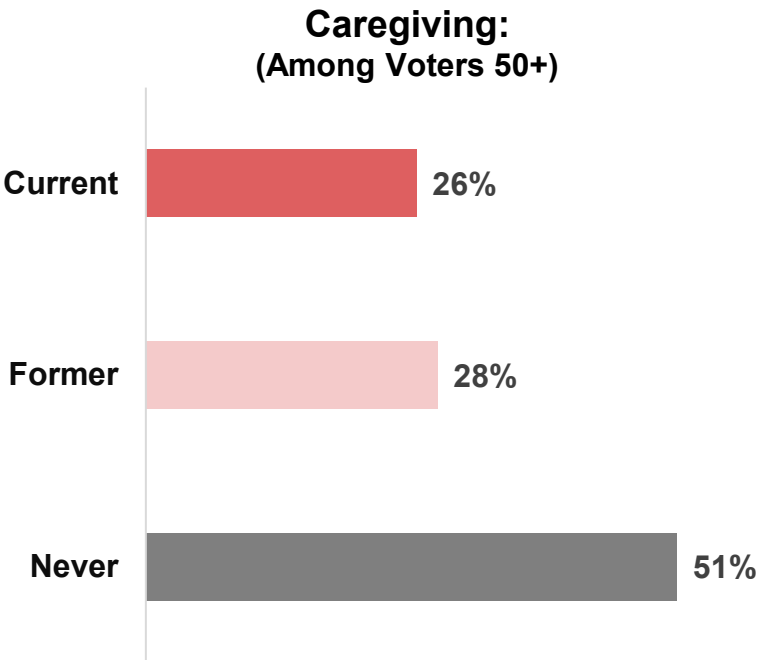
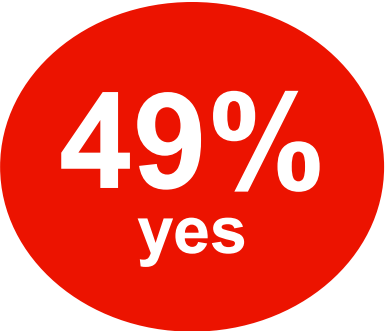


Voters 50+	All voters 50+	Women 50+	Men 50+	Voters 50 – 64	Voters 65+	GOP 50+	Ind 50+	Dem 50+	White 50+	Black 50+	<Coll 50+	Coll + 50+	Swing Voters 50+
Social Security major source	56	64	47	47	67	59	47	61	55	59	64	44	47

Family caregivers matter

- Half of voters 50+ either are currently or have in the past been a family caregiver.
- Women 50+ and Black voters 50+ are even more likely to be family caregivers.

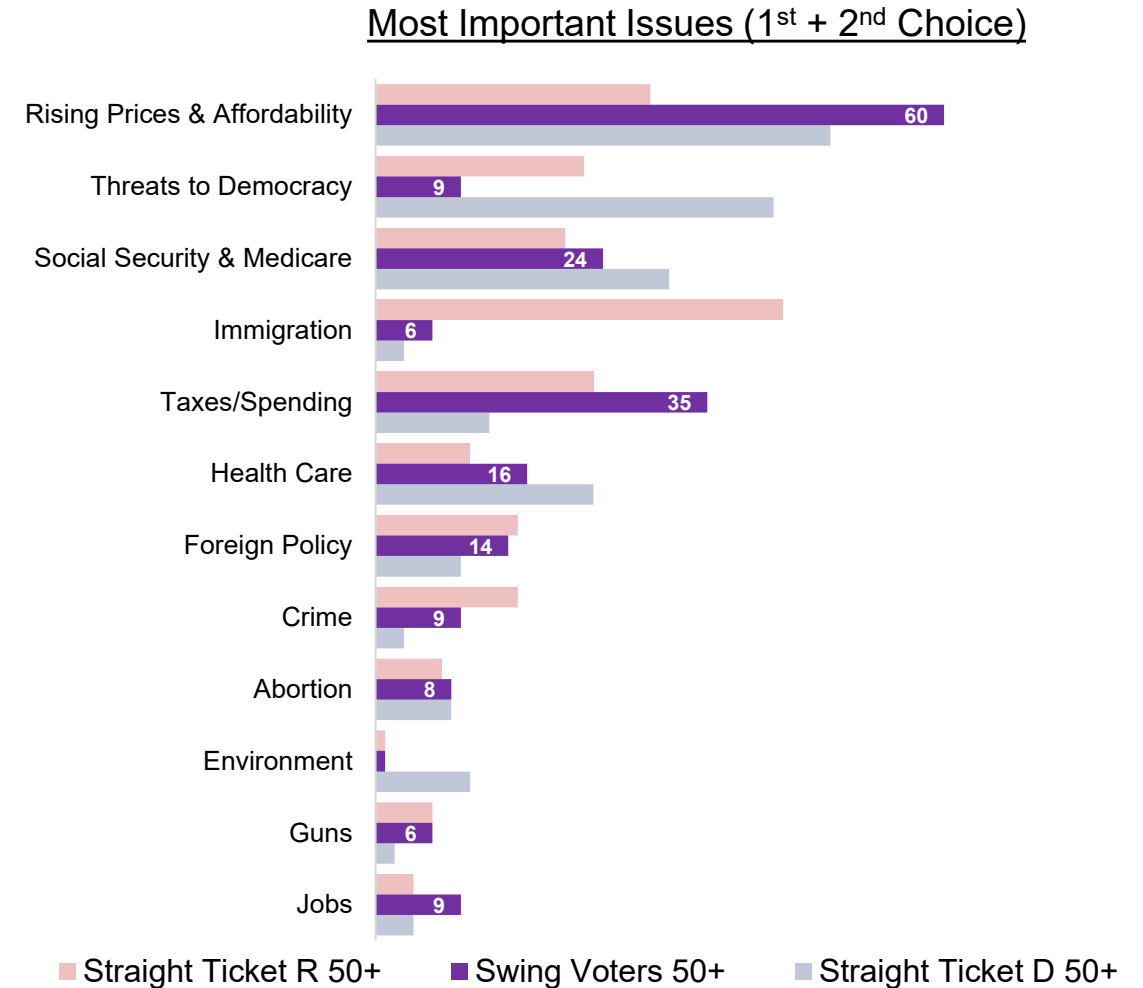
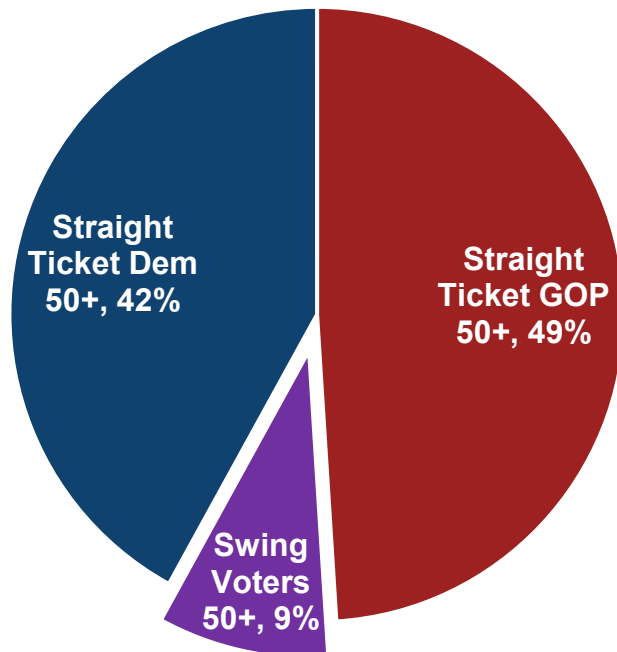
A family caregiver is someone who provides care or assistance to an older or ill adult, or someone with a disability. **Do you consider yourself to be a current or former family caregiver?**



Voters 50+	All voters 50+	Women 50+	Men 50+	Voters 50 – 64	Voters 65+	GOP 50+	Ind 50+	Dem 50+	White 50+	Black 50+	<Coll 50+	Coll + 50+	Swing Voters 50+
Family Caregiver	49	54	42	47	51	45	49	52	46	56	49	48	46

Swing Voters 50+

- 9% of voters 50+ are Swing Voters, which means they do not vote Straight Ticket Republican or Democrat on both the generic Congressional and Senate ballots.
- 54% are Independents, 25% are Republicans, 21% are Democrats.
- These voters are focused on economic issues for November, led by Rising Prices & Affordability, followed by Taxes/Spending and Social Security & Medicare.



North Carolina voters 18+

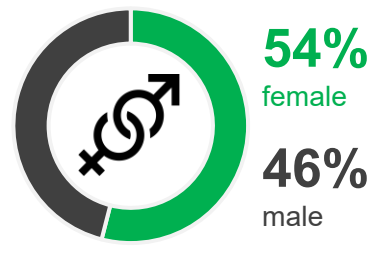


AARP commissioned the bipartisan polling team of [Fabrizio Ward](#) (R) & [Impact Research](#) (D) to conduct a survey of voters in North Carolina. The firms interviewed 1,115 likely voters statewide. The survey was done between September 17-20, 2026. The interviews were conducted via live interviewer on cell phone (40%) and landline (15%), as well as SMS-to-web (45%). The sample was randomly drawn from the North Carolina voter list. The margin of sampling error at the 95% confidence level for the 1,115 statewide sample is $\pm 2.9\%$.

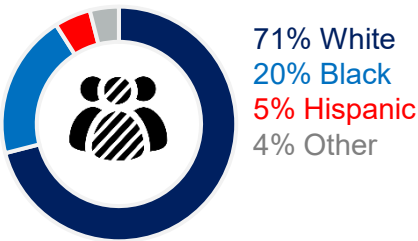
Due to rounding, answer choices may not always add up to 100%. Data is specified in the report that it is among either the 18+ or 50+ universe.

For more information about this survey, contact Kate Bridges at kbridges@aarp.org. Media inquiries North Carolina media contact Steve Hahn at shahn@aarp.org; national media contact media@aarp.org.

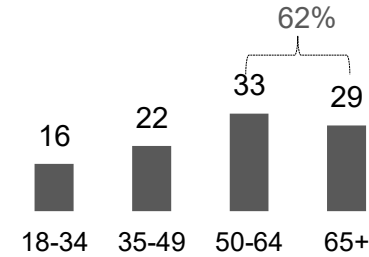
GENDER



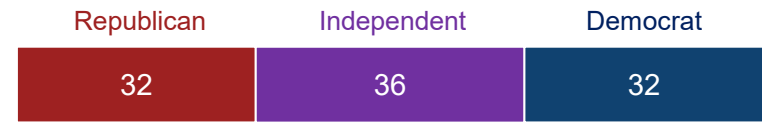
RACE



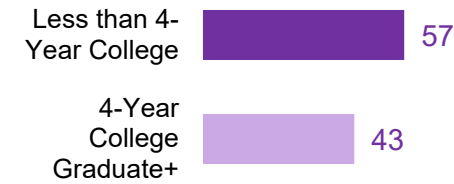
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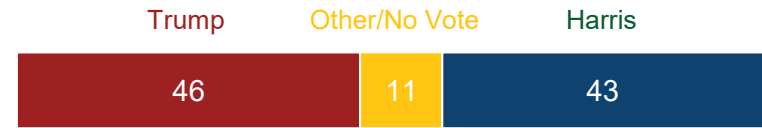
PARTY ID



EDUCATION



2024 VOTE



AARP (Among Voters 50+)





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This research was designed and executed by AARP Research