



Survey of Likely 2026 General Election Voters

North Carolina Statewide

Conducted November 9 - 10, 2025

n=600 | $\pm 4.00\%$

Q1. Vote Method: How do you plan to vote in the 2026 general election for U.S. Congress?

	Nov '25	Sep '25	Aug '25	Mar '25
<u>Vote in-person on Election Day</u>	<u>44.0%</u>	<u>35.3%</u>	<u>36.0%</u>	<u>34.7%</u>
Definitely vote in-person on Election Day	30.5%	27.3%	20.4%	22.8%
Probably vote in-person on Election Day	13.5%	8.0%	15.6%	11.9%
<u>Vote absentee by mail</u>	<u>5.0%</u>	<u>6.7%</u>	<u>6.0%</u>	<u>3.8%</u>
Definitely vote absentee by mail	3.0%	2.9%	3.3%	1.4%
Probably vote absentee by mail	2.0%	3.8%	2.6%	2.3%
<u>Vote early in-person</u>	<u>51.0%</u>	<u>58.0%</u>	<u>58.0%</u>	<u>61.5%</u>
Definitely vote early in-person	30.9%	34.0%	31.2%	35.3%
Probably vote early in-person	20.1%	23.9%	26.8%	26.3%
Total	100.0%	100.0%	100.0%	100.0%

Q2. Direction of Country: Generally speaking, would you say things in the United States are headed in the right direction or off on the wrong track?

	Nov '25	Sep '25	Aug '25	Mar '25
<u>Right direction</u>	<u>38.3%</u>	<u>42.3%</u>	<u>47.0%</u>	<u>47.6%</u>
Definitely the right direction	16.4%	18.8%	24.6%	30.9%
Mostly the right direction	21.8%	23.5%	22.3%	16.7%
<u>Wrong track</u>	<u>55.4%</u>	<u>53.7%</u>	<u>49.7%</u>	<u>47.4%</u>
Mostly the wrong track	12.1%	13.4%	12.7%	5.6%
Definitely the wrong track	43.4%	40.3%	36.9%	41.8%
Unsure	6.3%	4.0%	3.4%	5.0%
Total	100.0%	100.0%	100.0%	100.0%

Q3. Direction of NC: Generally speaking, would you say things in North Carolina are headed in the right direction or off on the wrong track?

	Nov '25	Aug '25	Mar '25	Nov '24
<u>Right direction</u>	<u>34.6%</u>	<u>38.9%</u>	<u>38.1%</u>	<u>50.1%</u>
Definitely the right direction	4.5%	5.0%	7.8%	18.7%
Mostly the right direction	30.1%	33.9%	30.3%	31.4%
<u>Wrong track</u>	<u>47.9%</u>	<u>41.7%</u>	<u>38.5%</u>	<u>27.9%</u>
Mostly the wrong track	28.0%	28.2%	22.7%	15.1%
Definitely the wrong track	19.9%	13.5%	15.8%	12.8%
Unsure	17.5%	19.4%	23.4%	22.0%
Total	100.0%	100.0%	100.0%	100.0%

Q4. Legislative Generic Ballot: If the 2026 general elections were held today, and you had to make a choice, would you vote for the Republican or Democratic candidates for the North Carolina State Legislature?

	Nov '25	Sep '25	Aug '25	Oct '24
<u>Republican candidate</u>	<u>43.2%</u>	<u>46.0%</u>	<u>45.2%</u>	<u>45.8%</u>
Definitely the Republican candidates	34.0%	36.8%	35.0%	40.7%
Probably the Republican candidates	9.2%	9.2%	10.3%	5.1%
<u>Democratic candidate</u>	<u>47.3%</u>	<u>44.4%</u>	<u>44.7%</u>	<u>46.6%</u>



Probably the Democratic candidates	9.5%	7.9%	8.4%	4.9%
Definitely the Democratic candidates	37.9%	36.5%	36.2%	41.7%
Unsure	9.4%	9.7%	10.1%	7.5%
Total	100.0%	100.0%	100.0%	100.0%

Q5. Senate Ballot with Whatley: If the 2026 midterm election for U.S. Senate was held today, and you had to make a choice, for whom would you vote if the options were?

	Nov '25	Sep '25	Aug '25
<u>Michael Whatley, the Republican</u>	<u>38.6%</u>	<u>41.9%</u>	<u>39.1%</u>
Definitely Michael Whatley, the Republican	26.6%	29.4%	24.7%
Probably Michael Whatley, the Republican	12.0%	12.5%	14.4%
<u>Roy Cooper, the Democrat</u>	<u>47.3%</u>	<u>46.1%</u>	<u>47.3%</u>
Probably Roy Cooper, the Democrat	9.1%	6.3%	7.3%
Definitely Roy Cooper, the Democrat	38.2%	39.8%	40.0%
<u>Someone else</u>	<u>4.0%</u>	<u>3.6%</u>	<u>3.9%</u>
Unsure	10.0%	8.4%	9.8%
Total	100.0%	100.0%	100.0%

Q6. Senate Ballot with Brown: If the 2026 midterm election for U.S. Senate was held today, and you had to make a choice, for whom would you vote if the options were?

	Freq.	%
<u>Don Brown, the Republican</u>	<u>228</u>	<u>38.0%</u>
Definitely Don Brown, the Republican	153	25.5%
Probably Don Brown, the Republican	75	12.6%
<u>Roy Cooper, the Democrat</u>	<u>288</u>	<u>48.1%</u>
Probably Roy Cooper, the Democrat	57	9.5%
Definitely Roy Cooper, the Democrat	231	38.5%
<u>Someone else</u>	<u>24</u>	<u>3.9%</u>
Unsure	60	10.0%
Total	600	100.0%

Q7. Trump Job Approval: Do you approve or disapprove of the job Donald Trump is doing as President?

	Nov '25	Sep '25	Aug '25	Mar '25
<u>Approve</u>	<u>45.7%</u>	<u>49.4%</u>	<u>47.8%</u>	<u>49.5%</u>
Strongly approve	32.0%	36.2%	36.8%	37.6%
Somewhat approve	13.8%	13.2%	11.0%	11.9%
<u>Disapprove</u>	<u>52.8%</u>	<u>49.0%</u>	<u>50.3%</u>	<u>48.7%</u>
Somewhat disapprove	4.6%	3.6%	5.8%	4.1%
Strongly disapprove	48.2%	45.4%	44.6%	44.6%
Unsure	1.5%	1.6%	1.8%	1.8%
Total	100.0%	100.0%	100.0%	100.0%



Q8. Stein Job Approval: Do you approve or disapprove of the job Josh Stein is doing as Governor?

	Nov '25	Sep '25	Aug '25	Mar '25
<u>Approve</u>	<u>49.5%</u>	<u>50.5%</u>	<u>50.5%</u>	<u>55.6%</u>
Strongly approve	22.1%	25.0%	22.6%	26.9%
Somewhat approve	27.3%	25.6%	27.9%	28.6%
<u>Disapprove</u>	<u>28.9%</u>	<u>31.1%</u>	<u>30.1%</u>	<u>20.4%</u>
Somewhat disapprove	13.5%	14.4%	16.1%	10.2%
Strongly disapprove	15.4%	16.7%	14.1%	10.2%
Unsure	21.6%	18.3%	19.4%	24.0%
Total	100.0%	100.0%	100.0%	100.0%

Q9. U.S. Economy Opinion: How do you feel about the state of the U.S. economy?

	Freq.	%
<u>Confident</u>	<u>238</u>	<u>39.6%</u>
Very confident	55	9.2%
Somewhat confident	182	30.4%
<u>Not confident</u>	<u>350</u>	<u>58.3%</u>
Not very confident	122	20.4%
Not confident at all	227	37.9%
Unsure	13	2.1%
Total	600	100.0%

Q10. Financial Situation: In thinking about your own household, how would you rate your current financial situation?

	Freq.	%
Excellent	57	9.5%
Good	224	37.4%
Fair	207	34.4%
Poor	79	13.2%
Very poor	25	4.2%
Unsure	8	1.3%
Total	600	100.0%

Q11. Shutdown Impact Opinion: The federal government is currently in a shutdown, while North Carolina's state government has not passed a budget for this fiscal year but continues operating. Which of these situations has a greater impact on you or your household?

	Freq.	%
The federal government shutdown	128	21.4%
The North Carolina state budget delay	36	5.9%
Both equally	154	25.6%
Neither has affected me personally	239	39.8%
Unsure	44	7.3%
Total	600	100.0%



Q12. Shutdown Blame Opinion: Who deserves the blame for the federal government shutdown?

	Freq.	%
Republicans in Congress	203	33.8%
Democrats in Congress	228	38.0%
Both	148	24.7%
Unsure	21	3.5%
Total	600	100.0%

Q13. Holiday Spending Change: Will you spend more or less on the holidays this year than last year?

	Freq.	%
<u>More</u>	<u>86</u>	<u>14.3%</u>
Much more	16	2.7%
Somewhat more	70	11.6%
<u>Less</u>	<u>403</u>	<u>67.2%</u>
Somewhat less	199	33.1%
Much less	205	34.1%
Unsure	111	18.5%
Total	600	100.0%

Q14. Tariffs on Economy Opinion: Do you think that the US imposing tariffs – which are taxes on goods or materials from other countries – helps or hurts the national economy?

	Freq.	%
<u>Helps</u>	<u>226</u>	<u>37.7%</u>
Definitely helps	137	22.9%
Probably helps	89	14.8%
<u>Hurts</u>	<u>321</u>	<u>53.5%</u>
Probably hurts	92	15.3%
Definitely hurts	229	38.2%
<u>No real impact</u>	<u>11</u>	<u>1.8%</u>
Unsure	42	7.0%
Total	600	100.0%

Q15. Tariffs on Family Opinion: Do you think that the US imposing tariffs – which are taxes on goods or materials from other countries – helps or hurts your family's financial situation?

	Freq.	%
<u>Helps</u>	<u>115</u>	<u>19.1%</u>
Definitely helps	61	10.2%
Probably helps	54	8.9%
<u>Hurts</u>	<u>335</u>	<u>55.8%</u>
Probably hurts	124	20.6%
Definitely hurts	211	35.2%
<u>No real impact</u>	<u>98</u>	<u>16.4%</u>



Unsure	52	8.7%
Total	600	100.0%

Q16. AI Opinion: Technology is advancing rapidly with powerful new AI tools. In terms of risks/rewards, what is your take on AI?

	Freq.	%
<u>Positive</u>	<u>167</u>	<u>27.9%</u>
Mostly positive	25	4.2%
Cautiously optimistic	142	23.6%
<u>Neutral</u>	<u>70</u>	<u>11.7%</u>
<u>Negative</u>	<u>341</u>	<u>56.8%</u>
Somewhat concerned	200	33.4%
Mostly negative	141	23.5%
Unsure	21	3.6%
Total	600	100.0%

Q17. AI Opinion Classroom: How do you view the implementation of AI into classrooms?

	Freq.	%
AI is a threat to real learning	207	34.5%
AI, when used correctly, is an aid to education	261	43.5%
Don't know	132	22.0%
Total	600	100.0%

Q18. Gender

	Freq.	%
Female	328	54.7%
Male	272	45.3%
Total	600	100.0%

Q19. Age Range

	Freq.	%
<u>Under 50</u>	<u>237</u>	<u>39.4%</u>
18 - 34	93	15.5%
35 - 49	144	24.0%
<u>50+</u>	<u>363</u>	<u>60.6%</u>
50 - 64	183	30.4%
65 or older	181	30.2%
Total	600	100.0%

Q20. Party

	Freq.	%
Republican	199	33.2%
Democrat	203	33.8%
Independent	160	26.7%
Other	29	4.8%
Unsure	9	1.5%
Total	600	100.0%



Q21. Ideology

	Freq.	%
<u>Conservative</u>	<u>267</u>	<u>44.5%</u>
Very conservative	145	24.1%
Somewhat conservative	123	20.4%
<u>Moderate</u>	<u>146</u>	<u>24.3%</u>
<u>Liberal</u>	<u>162</u>	<u>27.1%</u>
Somewhat liberal	86	14.3%
Very liberal	76	12.7%
Unsure	25	4.1%
Total	600	100.0%

Q22. Urbanicity

	Freq.	%
Rural	258	43.0%
Suburban	258	43.1%
Urban	84	13.9%
Total	600	100.0%

Q23. Income

	Freq.	%
Less than \$40,000	94	15.7%
\$40,000 - \$69,999	139	23.2%
\$70,000 - \$99,999	99	16.5%
\$100,000 or more	207	34.6%
Unsure	60	10.0%
Total	600	100.0%

Q24. Race/Ethnicity

	Freq.	%
White or Caucasian	436	72.7%
Asian or Pacific Islander	4	0.7%
Black or African American	107	17.8%
Hispanic or Latino	19	3.2%
Other	30	5.0%
Unsure	4	0.7%
Total	600	100.0%

Q25. 2024 Retro Ballot

	Freq.	%
Donald Trump, the Republican	288	48.0%
Kamala Harris, the Democrat	271	45.2%
Another candidate	12	2.0%
Did not vote in 2024	13	2.1%
Unsure	16	2.6%
Total	600	100.0%



Q26. Education Level

	Freq.	%
<u>No College</u>	<u>315</u>	<u>52.6%</u>
Some high school	9	1.6%
High school diploma/GED	69	11.5%
Technical Certification	31	5.1%
Some college or Associate's Degree	206	34.4%
<u>At least College</u>	<u>281</u>	<u>46.9%</u>
Four-year undergraduate or Bachelor's	154	25.7%
Graduate degree or further	127	21.1%
Unsure	4	0.6%
Total	600	100.0%

Q27. General Election X of 4

	Freq.	%
0 of 4	13	2.2%
1 of 4	75	12.5%
2 of 4	86	14.4%
3 of 4	121	20.2%
4 of 4	304	50.7%
Total	600	100.0%

Q28. Geo - DMA

	Freq.	%
<u>Charlotte/West</u>	<u>216</u>	<u>36.0%</u>
Charlotte	162	27.0%
Greenville-Spart-Ashevil-And	51	8.5%
Chattanooga	3	0.5%
<u>Central</u>	<u>108</u>	<u>18.0%</u>
Greensboro-H.Point-W.Salem	103	17.1%
Myrtle Beach-Florence	5	0.9%
<u>Raleigh-Durham (Fayetteville)</u>	<u>188</u>	<u>31.3%</u>
<u>Coastal</u>	<u>88</u>	<u>14.7%</u>
Greenville-N.Bern-Washngtn	41	6.9%
Wilmington	37	6.1%
Norfolk-Portsmth-Newpt Nws	11	1.8%
Total	600	100.0%

Q29. Geo - CD

	Freq.	%
1	40	6.6%
2	45	7.5%
3	39	6.5%
4	48	7.9%
5	43	7.2%
6	40	6.7%
7	47	7.8%



8	44	7.4%
9	40	6.7%
10	44	7.3%
11	50	8.4%
12	34	5.7%
13	45	7.4%
14	41	6.9%
Total	600	100.0%

Q30. Gender + Age

	Freq.	%
F 18 - 34	53	8.9%
F 35 - 49	70	11.6%
F 50 - 64	102	17.0%
F 65+	103	17.2%
M 18 - 34	39	6.6%
M 35 - 49	74	12.4%
M 50 - 64	81	13.4%
M 65+	78	13.0%
Total	600	100.0%

Q31. Race + Gender

	Freq.	%
White Female	233	38.8%
White Male	203	33.9%
Asian Female	1	0.2%
Asian Male	3	0.4%
Black Female	68	11.3%
Black Male	39	6.5%
Hispanic Female	10	1.6%
Hispanic Male	9	1.5%
Other Female	13	2.2%
Other Male	16	2.7%
Unsure	4	0.7%
Total	600	100.0%

Q32. Gender + Education

	Freq.	%
Female At least College	143	23.9%
Female No degree	183	30.5%
Male At least College	138	23.0%
Male No degree	132	22.1%
Unsure	4	0.6%
Total	600	100.0%

METHODOLOGY

The sample size is 600 likely voters in the 2026 general election in North Carolina Statewide. The margin of error is $\pm 4.00\%$ at a confidence interval of 95%. The demography of the survey sample is balanced to accurately represent the geography's likely-voting population. The data was collected November 9 – 10, 2025 and respondent interviews were conducted via live phones and SMS-to-online. The total percentages of response may not equal 100% due to rounding.

