



CYGNAL

Survey of Likely General Election Voters

North Carolina Statewide

Conducted May 11 - 13, 2025

n=614 | $\pm 3.94\%$

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

	Freq.	%
<u>Vote in-person on Election Day</u>	<u>251</u>	<u>40.8%</u>
Definitely vote in-person on Election Day	171	27.8%
Probably vote in-person on Election Day	80	13.0%
<u>Vote absentee by mail</u>	<u>33</u>	<u>5.4%</u>
Definitely vote absentee by mail	21	3.4%
Probably vote absentee by mail	13	2.1%
<u>Vote early in-person</u>	<u>330</u>	<u>53.8%</u>
Definitely vote early in-person	175	28.6%
Probably vote early in-person	155	25.2%
Total	614	100.0%

Q2 - Q6. Images: For each of the following, please indicate if you have heard of the person or activity, and if you have, whether you have a favorable or unfavorable opinion of them. If you haven't heard of a name, choose so.

Q2. Image: Josh Stein

	May '25	Nov '23	Aug '23
<u>Favorable</u>	<u>48.1%</u>	<u>25.8%</u>	<u>19.9%</u>
Very favorable	28.3%	15.2%	11.0%
Somewhat favorable	19.8%	10.6%	8.9%
<u>Unfavorable</u>	<u>23.9%</u>	<u>9.9%</u>	<u>12.0%</u>
Somewhat unfavorable	10.4%	3.2%	3.8%
Very unfavorable	13.5%	6.7%	8.2%
No opinion	18.7%	18.6%	20.6%
Never heard of	9.3%	45.6%	47.5%
Total	100.0%	100.0%	100.0%

Q3. Image: Donald Trump

	Freq.	%
<u>Favorable</u>	<u>279</u>	<u>45.5%</u>
Very favorable	220	35.9%
Somewhat favorable	59	9.6%
<u>Unfavorable</u>	<u>312</u>	<u>50.8%</u>
Somewhat unfavorable	22	3.6%
Very unfavorable	290	47.2%
No opinion	20	3.2%
Never heard of	3	0.5%
Total	614	100.0%

Q4. Image: Roy Cooper

	Freq.	%
<u>Favorable</u>	<u>292</u>	<u>47.5%</u>
Very favorable	204	33.2%
Somewhat favorable	88	14.4%
<u>Unfavorable</u>	<u>225</u>	<u>36.6%</u>



Somewhat unfavorable	76	12.4%
Very unfavorable	149	24.2%
No opinion	72	11.6%
Never heard of	26	4.2%
Total	614	100.0%

Q5. Image: Thom Tillis

	Freq.	%
<u>Favorable</u>	<u>162</u>	<u>26.4%</u>
Very favorable	49	8.0%
Somewhat favorable	113	18.4%
<u>Unfavorable</u>	<u>283</u>	<u>46.1%</u>
Somewhat unfavorable	116	19.0%
Very unfavorable	167	27.2%
No opinion	111	18.1%
Never heard of	57	9.3%
Total	614	100.0%

Q6. Image: Legalized Sports Betting

	Freq.	%
<u>Favorable</u>	<u>178</u>	<u>28.9%</u>
Very favorable	59	9.7%
Somewhat favorable	118	19.3%
<u>Unfavorable</u>	<u>248</u>	<u>40.4%</u>
Somewhat unfavorable	96	15.6%
Very unfavorable	152	24.7%
No opinion	155	25.3%
Never heard of	33	5.4%
Total	614	100.0%

Q7. Minimum Grade: Now thinking about several important issues... Do you approve or disapprove of policies that guarantee students a minimum grade in school (such as a 50%), even if they complete no work?

	Freq.	%
<u>Approve</u>	<u>52</u>	<u>8.4%</u>
Strongly approve	17	2.7%
Somewhat approve	35	5.7%
<u>Disapprove</u>	<u>520</u>	<u>84.7%</u>
Somewhat disapprove	87	14.2%
Strongly disapprove	433	70.5%
Unsure	42	6.9%
Total	614	100.0%

Q8. Flags Opinion: Do you support or oppose a law that prohibits state or local government buildings in North Carolina from displaying any flags other than official governmental flags (such as U.S., state, city, or military flags) to ensure ideological neutrality?

	Freq.	%
<u>Support</u>	<u>386</u>	<u>62.9%</u>
Strongly support	292	47.6%



Somewhat support	94	15.3%
<u>Oppose</u>	<u>162</u>	<u>26.3%</u>
Somewhat oppose	62	10.1%
Strongly oppose	100	16.2%
Unsure	66	10.8%
Total	614	100.0%

Q9. Hunting Restriction Opinion: Do you support or oppose laws that restrict hunting on Sundays in North Carolina?

	Freq.	%
<u>Support</u>	<u>189</u>	<u>30.7%</u>
Strongly support	116	18.9%
Somewhat support	72	11.8%
<u>Oppose</u>	<u>268</u>	<u>43.7%</u>
Somewhat oppose	116	18.9%
Strongly oppose	152	24.8%
Unsure	157	25.6%
Total	614	100.0%

Q10. Define Woman Opinion: Would you support or oppose a law that defines the legal term 'woman' specifically as someone assigned female at birth (i.e. a biological woman)?

	Freq.	%
<u>Support</u>	<u>390</u>	<u>63.6%</u>
Strongly support	340	55.4%
Somewhat support	50	8.1%
<u>Oppose</u>	<u>176</u>	<u>28.6%</u>
Somewhat oppose	39	6.4%
Strongly oppose	136	22.2%
Unsure	48	7.9%
Total	614	100.0%

Q11. Economy Change Opinion: Overall, do you think the economy is getting better, getting worse, or staying about the same?

	Freq.	%
<u>Better</u>	<u>198</u>	<u>32.3%</u>
Getting much better	60	9.8%
Getting somewhat better	138	22.4%
<u>Staying about the same</u>	<u>77</u>	<u>12.6%</u>
<u>Worse</u>	<u>329</u>	<u>53.5%</u>
Getting somewhat worse	101	16.5%
Getting much worse	227	37.0%
Unsure	10	1.6%
Total	614	100.0%



Q12. Tariff Impact on Purchases: How likely do you think it is that higher tariffs on imported goods will result in you paying more for the products you buy?

	Freq.	%
<u>Likely</u>	<u>462</u>	<u>75.3%</u>
Very likely	345	56.2%
Somewhat likely	117	19.1%
<u>Not likely</u>	<u>119</u>	<u>19.4%</u>
Not too likely	79	12.8%
Not at all likely	41	6.6%
Unsure	33	5.3%
Total	614	100.0%

Q13. Tariff Impact on Manufacturing Jobs: How likely do you think it is that higher tariffs on imported goods will lead to more manufacturing jobs being created in the United States?

	Freq.	%
<u>Likely</u>	<u>321</u>	<u>52.2%</u>
Very likely	201	32.7%
Somewhat likely	119	19.5%
<u>Not likely</u>	<u>267</u>	<u>43.5%</u>
Not too likely	136	22.2%
Not at all likely	131	21.3%
Unsure	27	4.3%
Total	614	100.0%

Q14. Tariff Benefits Timeline Opinion: How long of a disruption to the U.S. economy would you be willing to accept in order for the U.S. to realize any economic benefits from higher tariffs?

	Freq.	%
More than 5 years	33	5.4%
4-5 years	24	3.8%
2-3 years	109	17.8%
1 year	99	16.1%
A few months	55	8.9%
I do not believe there will be any benefit from tariffs	249	40.6%
Unsure	45	7.3%
Total	614	100.0%

Q15. Tariff Position Opinion: Which of the following statements comes closer to your view on the tariffs proposed by President Donald Trump?

	Freq.	%
Tariffs are necessary to protect American industries and reduce dependence on foreign countries	250	40.7%
Tariffs raise consumer prices and hurt businesses that rely on imported goods and raw materials	298	48.5%
Tariffs are mostly symbolic and unlikely to have a major economic impact	27	4.4%
Unsure	39	6.4%
Total	614	100.0%



Q16. Worker Shortage Opinion: Do you personally see signs of a worker shortage in the businesses you interact with (such as restaurants, stores, or service providers)?

	Freq.	%
<u>Yes</u>	<u>419</u>	<u>68.3%</u>
Yes, frequently	229	37.4%
Yes, occasionally	190	30.9%
<u>No</u>	<u>162</u>	<u>26.3%</u>
No, not really	102	16.7%
No, not at all	59	9.7%
Unsure	33	5.4%
Total	614	100.0%

Q17. Grow Manufacturing Jobs Opinion: If a policy goal is to generate more manufacturing jobs in the United States, which one of the following do you think would be most effective? Please select only one.

	Freq.	%
Imposing tariffs on imported goods	62	10.0%
Lowering taxes on manufacturers	143	23.2%
Rolling back government regulations (red tape)	150	24.5%
The government should not interfere in selecting which industries grow	161	26.3%
Unsure	98	16.0%
Total	614	100.0%

Q18. Raw Milk Opinion: Do you support or oppose allowing licensed North Carolina dairy farmers to sell unpasteurized, or "raw," milk and raw milk products directly to consumers at the farm or nearby farm stand, with health and safety regulations in place?

	Freq.	%
<u>Support</u>	<u>359</u>	<u>58.5%</u>
Strongly support	198	32.2%
Somewhat support	161	26.3%
<u>Oppose</u>	<u>165</u>	<u>26.8%</u>
Somewhat oppose	50	8.1%
Strongly oppose	115	18.7%
Unsure	90	14.7%
Total	614	100.0%

Q19. Housing Shortage Solutions: What do you think the state government should do to help address the housing shortage? Please select the one option you most support:

	Freq.	%
Relax zoning regulations to allow more housing development	48	7.8%
Increase funding for affordable housing programs	211	34.3%
Offer tax incentives to developers who build low- and middle-income housing	138	22.5%
Leave housing policy to local governments without state involvement	127	20.6%
Unsure	90	14.7%
Total	614	100.0%



Q20. Override Local Government Opinion: Should the state government have the authority to set or override local government decisions about housing density (such as how many homes can be built on a piece of land)?

	Freq.	%
Yes, the state should be able to override local decisions	81	13.2%
No, local governments should retain full control	209	34.0%
The state should only step in under specific circumstances (e.g., housing crisis)	241	39.2%
Unsure	83	13.5%
Total	614	100.0%

Q21. Gender

	Freq.	%
Female	336	54.7%
Male	278	45.3%
Total	614	100.0%

Q22. Age Range

	Freq.	%
<u>Under 50</u>	<u>229</u>	<u>37.2%</u>
18 - 34	98	16.0%
35 - 49	130	21.3%
<u>50 and Over</u>	<u>385</u>	<u>62.8%</u>
50 - 64	193	31.4%
65 or older	192	31.3%
Total	614	100.0%

Q23. Partisanship by Registration

	Freq.	%
Republican	212	34.5%
Democrat	204	33.3%
Independent/Other	179	29.1%
Unsure	19	3.2%
Total	614	100.0%

Q24. Ideology

	Freq.	%
<u>Conservative</u>	<u>276</u>	<u>45.0%</u>
Very conservative	129	21.0%
Somewhat conservative	147	24.0%
<u>Moderate</u>	<u>141</u>	<u>23.0%</u>
<u>Liberal</u>	<u>173</u>	<u>28.1%</u>
Somewhat liberal	102	16.6%
Very liberal	71	11.5%
Unsure	24	3.9%
Total	614	100.0%



Q25. Urbanicity/Community Type

	Freq.	%
Rural	276	45.0%
Suburban	258	42.0%
Urban	80	13.0%
Total	614	100.0%

Q26. 2024 Retro Ballot

	Freq.	%
Republican Donald Trump	296	48.2%
Democrat Kamala Harris	277	45.1%
Another candidate	19	3.1%
Did not vote in 2024	8	1.3%
Unsure	14	2.4%
Total	614	100.0%

Q27. Income by Response

	Freq.	%
Less than \$40,000	109	17.8%
\$40,000 - \$69,999	117	19.0%
\$70,000 - \$99,999	122	19.9%
\$100,000 or more	225	36.6%
Unsure	41	6.7%
Total	614	100.0%

Q28. Race/Ethnicity

	Freq.	%
White or Caucasian	440	71.7%
Asian or Pacific Islander	3	0.6%
Black or African American	111	18.0%
Hispanic or Latino	25	4.1%
Other	19	3.2%
Unsure	15	2.4%
Total	614	100.0%

Q29. Education Level

	Freq.	%
<u>No College</u>	<u>314</u>	<u>51.1%</u>
Some high school	6	0.9%
High school diploma/GED	80	13.1%
Technical Certification	26	4.3%
Some college or Associate's Degree	202	32.8%
<u>At least College</u>	<u>288</u>	<u>46.9%</u>
Four-year undergraduate or Bachelor's Degree	150	24.4%
Graduate degree or further	138	22.5%
Unsure	12	2.0%
Total	614	100.0%

Q30. General Election X of 4

	Freq.	%
0 of 4	3	0.5%
1 of 4	78	12.7%
2 of 4	85	13.9%



3 of 4	128	20.8%
4 of 4	320	52.2%
Total	614	100.0%

Q31. Geo - DMA

	Freq.	%
<u>Charlotte/West</u>	<u>218</u>	<u>35.5%</u>
Atlanta	0	0.0%
Charlotte	163	26.5%
Greenvll-Spart-Ashevl-And	52	8.5%
Chattanooga	3	0.5%
<u>Central</u>	<u>110</u>	<u>17.8%</u>
Greensboro-H.Point-W.Salem	104	16.9%
Myrtle Beach-Florence	6	0.9%
<u>Raleigh-Durham (Fayetvle)</u>	<u>196</u>	<u>32.0%</u>
<u>Coastal</u>	<u>90</u>	<u>14.7%</u>
Greenville-N.Bern-Washngtn	42	6.9%
Wilmington	37	6.0%
Norfolk-Portsmth-Newpt Nws	11	1.8%
Total	614	100.0%

Q32. Geo - CD

	Freq.	%
1	43	7.0%
2	49	8.0%
3	41	6.6%
4	47	7.6%
5	44	7.1%
6	42	6.9%
7	47	7.6%
8	44	7.2%
9	38	6.2%
10	45	7.3%
11	51	8.4%
12	37	6.0%
13	46	7.4%
14	41	6.7%
Total	614	100.0%

Q34. Gender + Age

	Freq.	%
F 18 - 34	55	8.9%
F 35 - 49	71	11.6%
F 50 - 64	104	17.0%
F 65+	106	17.2%
M 18 - 34	43	7.1%
M 35 - 49	59	9.6%
M 50 - 64	89	14.4%
M 65+	87	14.2%
Total	614	100.0%



Q35. Race + Gender

	Freq.	%
White Female	236	38.5%
White Male	204	33.2%
Asian Female	1	0.2%
Asian Male	2	0.4%
Black Female	69	11.3%
Black Male	41	6.7%
Hispanic Female	13	2.1%
Hispanic Male	13	2.0%
Other Female	13	2.1%
Other Male	7	1.1%
Unsure	15	2.4%
Total	614	100.0%

Q36. Gender + Education

	Freq.	%
Female At least College	163	26.6%
Female No degree	167	27.2%
Male At least College	125	20.3%
Male No degree	147	23.9%
Unsure	12	2.0%
Total	614	100.0%

Q37. Partisanship + Age

	Freq.	%
Republican 18-34	31	5.1%
Republican 35-49	38	6.3%
Republican 50-64	75	12.2%
Republican 65+	67	11.0%
Democrat 18-34	31	5.1%
Democrat 35-49	38	6.3%
Democrat 50-64	65	10.6%
Democrat 65+	70	11.3%
Independent/Other 18-34	35	5.7%
Independent/Other 35-49	46	7.6%
Independent/Other 50-64	45	7.4%
Independent/Other 65+	52	8.5%
Unsure	19	3.2%
Total	614	100.0%

Q38. Partisanship + Gender

	Freq.	%
Republican Female	92	15.0%
Republican Male	120	19.5%
Democrat Female	129	21.0%
Democrat Male	75	12.2%
Independent/Other Female	102	16.7%
Independent/Other Male	76	12.4%
Unsure	19	3.2%
Total	614	100.0%



METHODOLOGY

This probabilistic survey was conducted May 11 – 13, 2025, with 614 likely general election voters. It has a margin of error of $\pm 3.94\%$. Known registered voters were interviewed via live phones and SMS. This survey was weighted to a likely general election voter universe.

ABOUT THE FIRM

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