

M E E T | N G
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A LOOK AT
NORTH CAROLINA VOTERS'
PERCEPTIONS ON
KEY STATE ISSUES



KEY FINDINGS FROM A RECENT STATEWIDE VOTER SURVEY

METHODOLOGY

Meeting Street Insights is pleased to present the key findings from a statewide survey of registered voters in North Carolina.

Interviews were conducted February 26 – March 1, 2023, among N=500 registered voters. This survey has a margin of error of plus or minus 4.38%.

This is the 14th statewide survey Meeting Street has conducted for CPR since 2014.

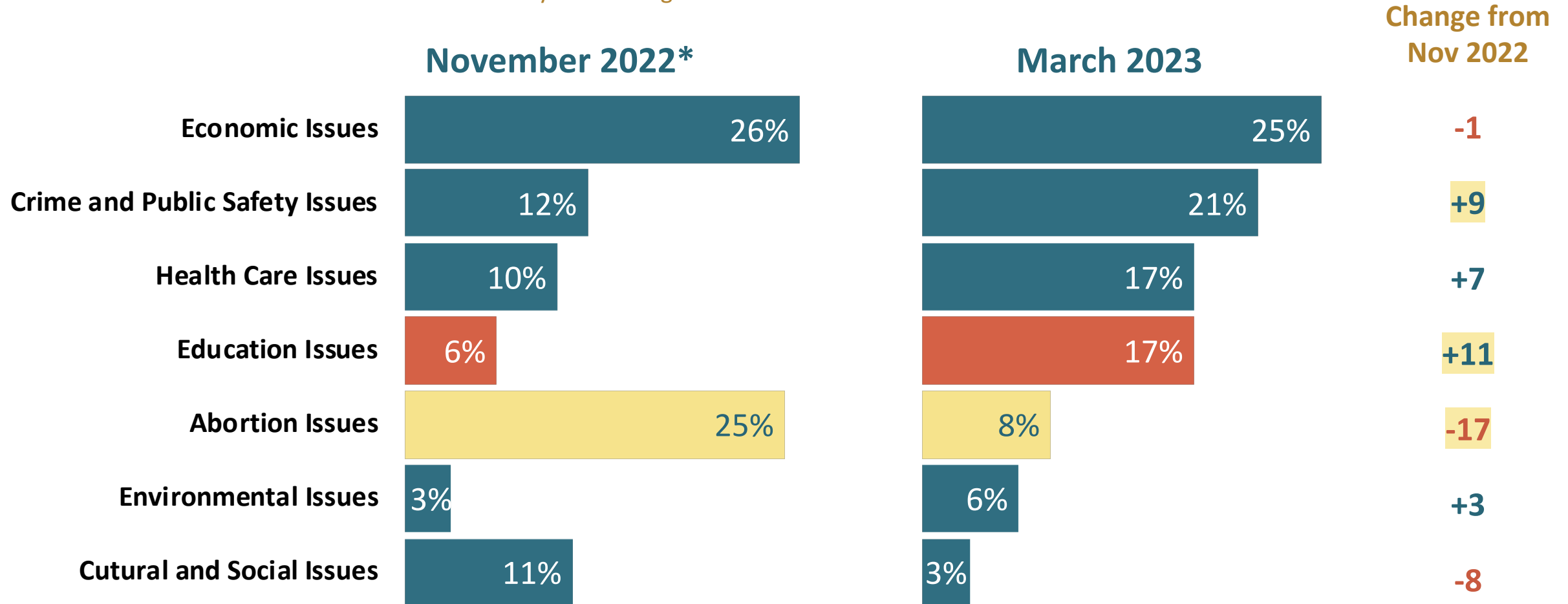


SETTING THE ISSUE AGENDA



Economic and public safety issues remain at the top of the issue agenda, but we do see some shifts since November.

“Now, thinking about the session of the State Legislature in Raleigh this year, which of the following seven issues do you think legislators should focus the most attention on?”



Republicans, Unaffiliateds, and Democrats have wildly different issue priorities, some of which have shifted noticeably in the past four – five months.

Issue Agenda By Key Subgroups (November 2022 Data In Red)

	Republicans	Unaffiliateds	Democrats
Economic Issues	31%	30%	15%
Crime and Public Safety Issues	38% 19%	14% 9%	12%
Health Care Issues	6%	16%	28% 15%
Education Issues	13% 6%	15% 4%	22%
Abortion Issues	6%	8%	10% 38%
Environmental Issues	0%	9%	9%
Cultural and Social Issues	2%	3%	3%

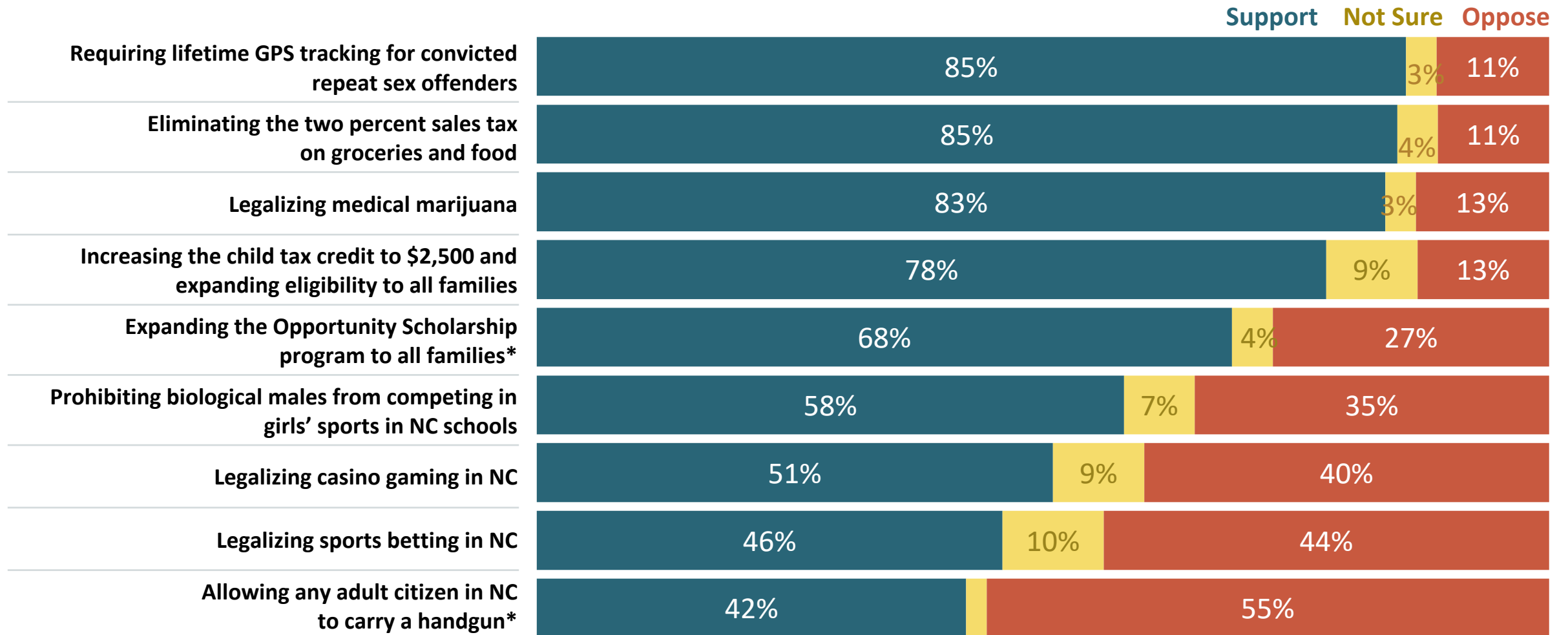


REACTIONS TO LEGISLATIVE PROPOSALS



A number of General Assembly proposals receive strong voter support.

“Next, I’m going to read you some different proposals the North Carolina General Assembly in Raleigh might consider. For each one, please tell me if you support or oppose the General Assembly taking action on that item.”

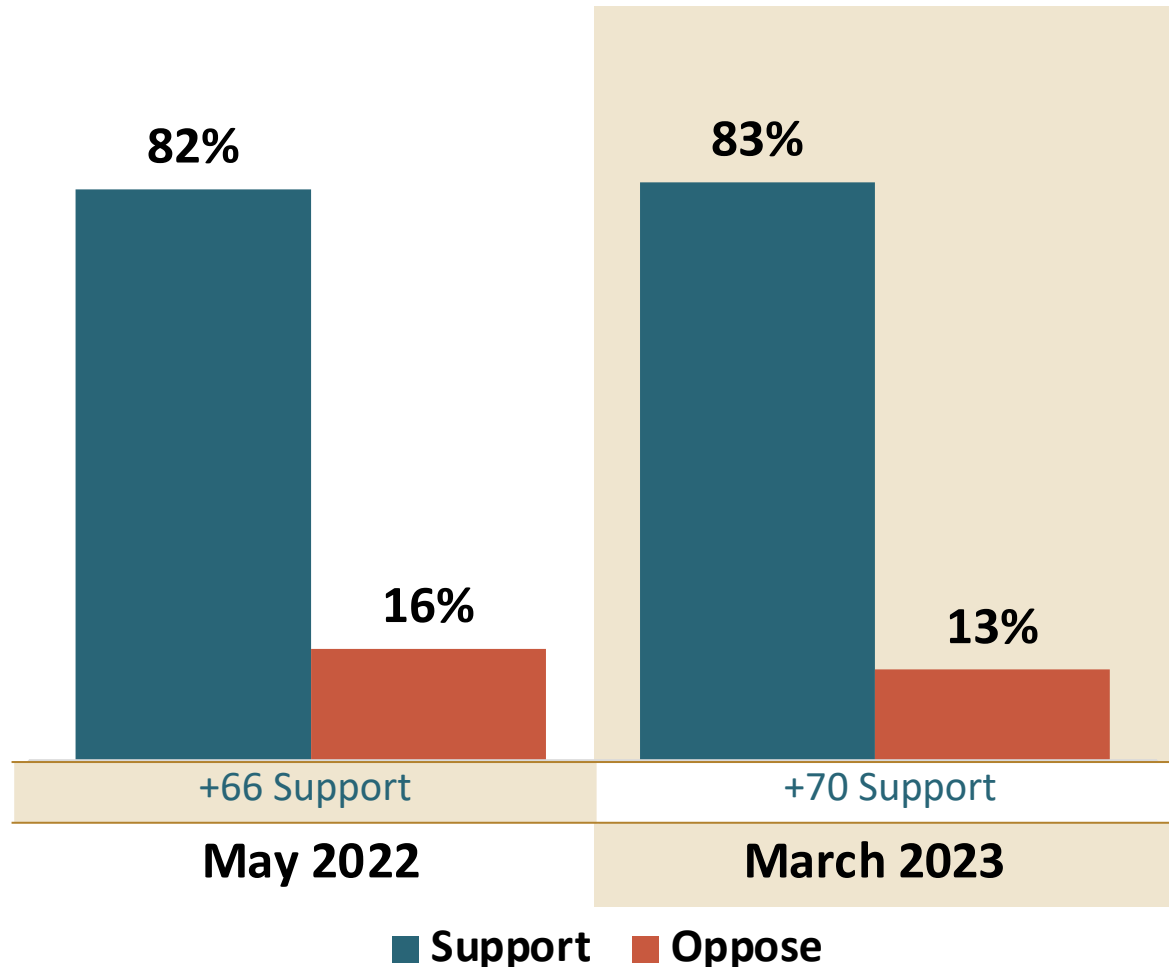


*Expanding the Opportunity Scholarship program to make all families of school-age children eligible for a grant of six thousand dollars per child to send their children to a private school if their local public school fails to meet their children's academic needs

*Allowing any adult citizen in North Carolina to carry a handgun without a concealed handgun permit, unless they are otherwise prohibited from having a gun

Legalizing medical marijuana receives broad bipartisan support.

Legalizing Medical Marijuana Trend

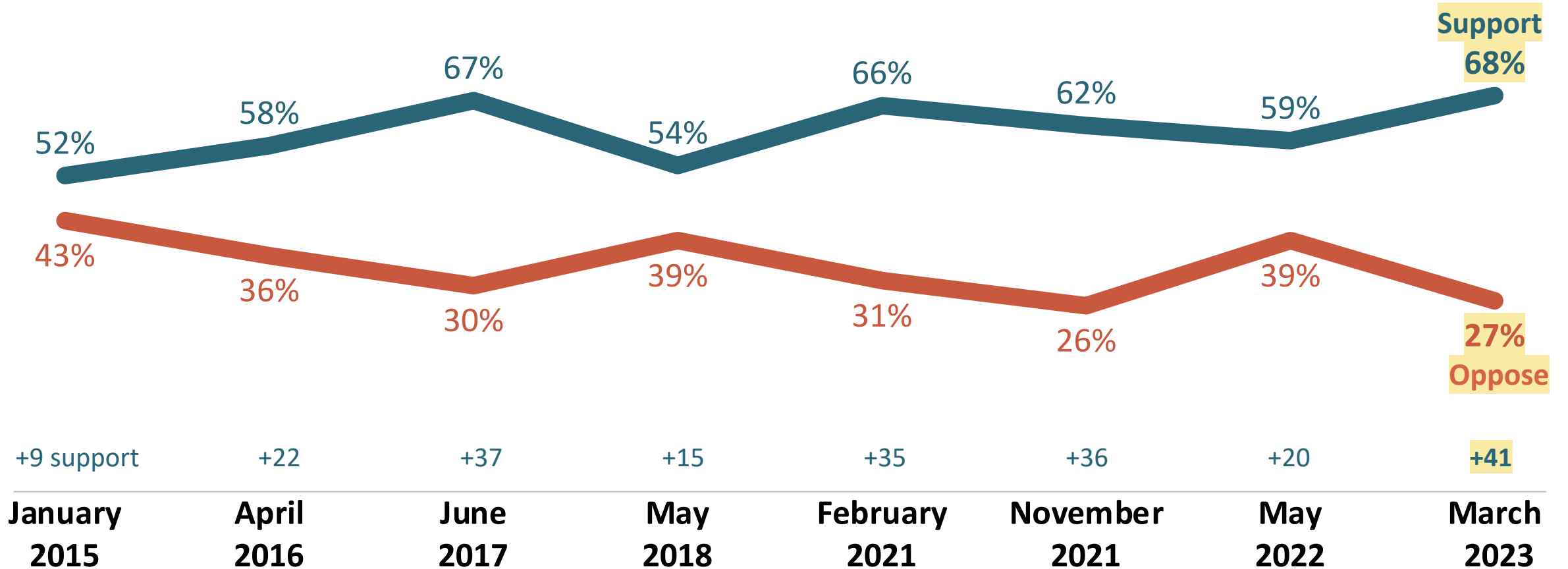


	Support	Oppose
Republicans	77%	20%
Unaffiliateds	86%	10%
Democrats	86%	11%
African Americans	80%	12%
White Men Ages 18-54	86%	13%
White Men Ages 55+	75%	23%
White Women Ages 18-54	91%	6%
White Women Ages 55+	81%	16%
White Men Non-College	77%	23%
White Men College+	86%	12%
White Women Non-College	84%	12%
White Women College+	89%	8%
White Evangelicals	71%	26%

Support for the Opportunity Scholarship program has reached the highest levels we've seen in eight years of testing.

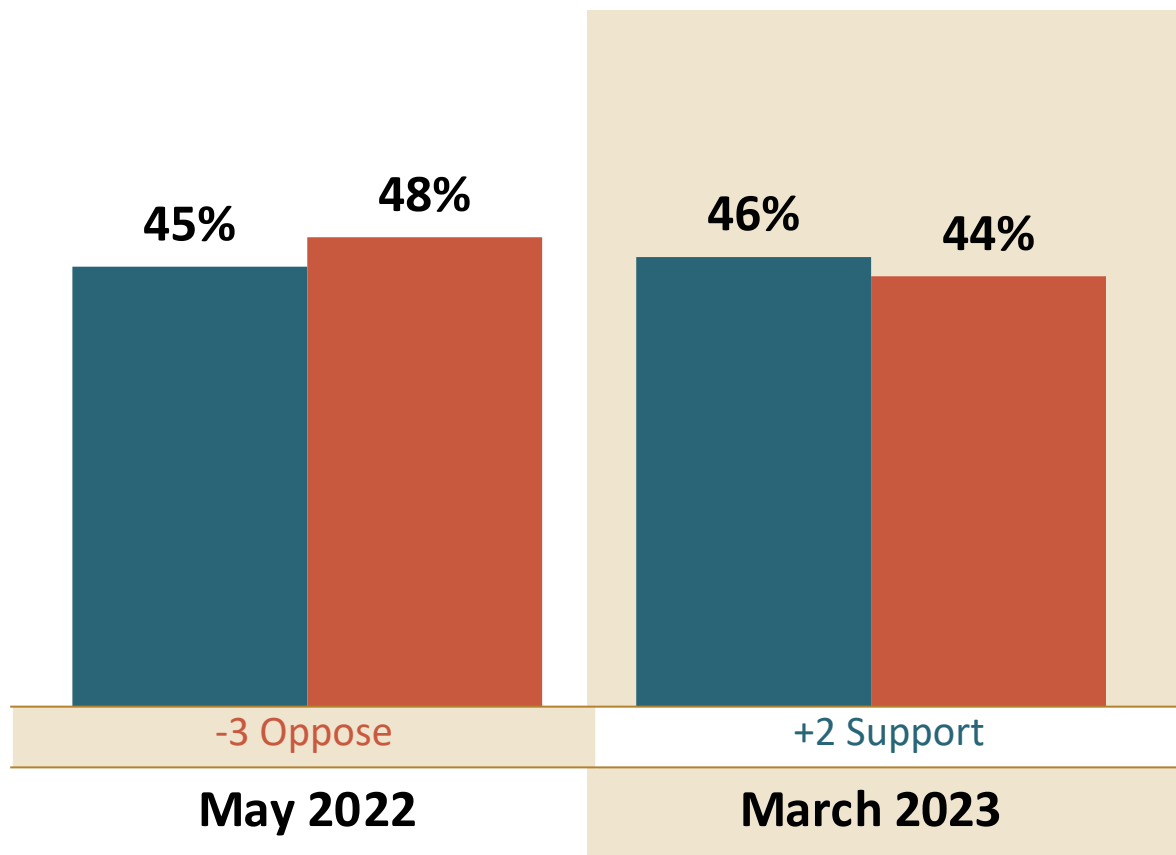
Opportunity Scholarship Program

Support Oppose

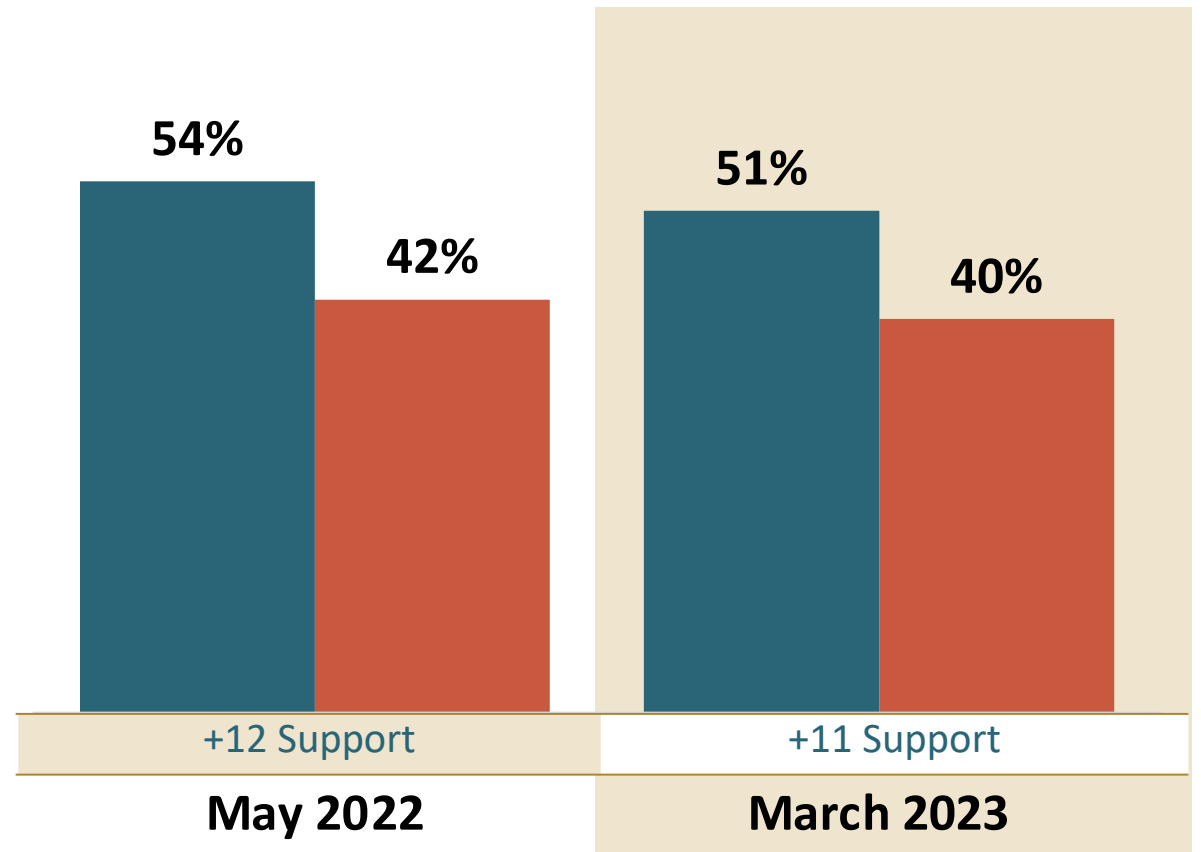


Sports betting is a net five points more popular today than it was last May, while casino gaming is supported by about half of registered voters.

Legalize sports betting in North Carolina



Legalizing casino gaming in North Carolina



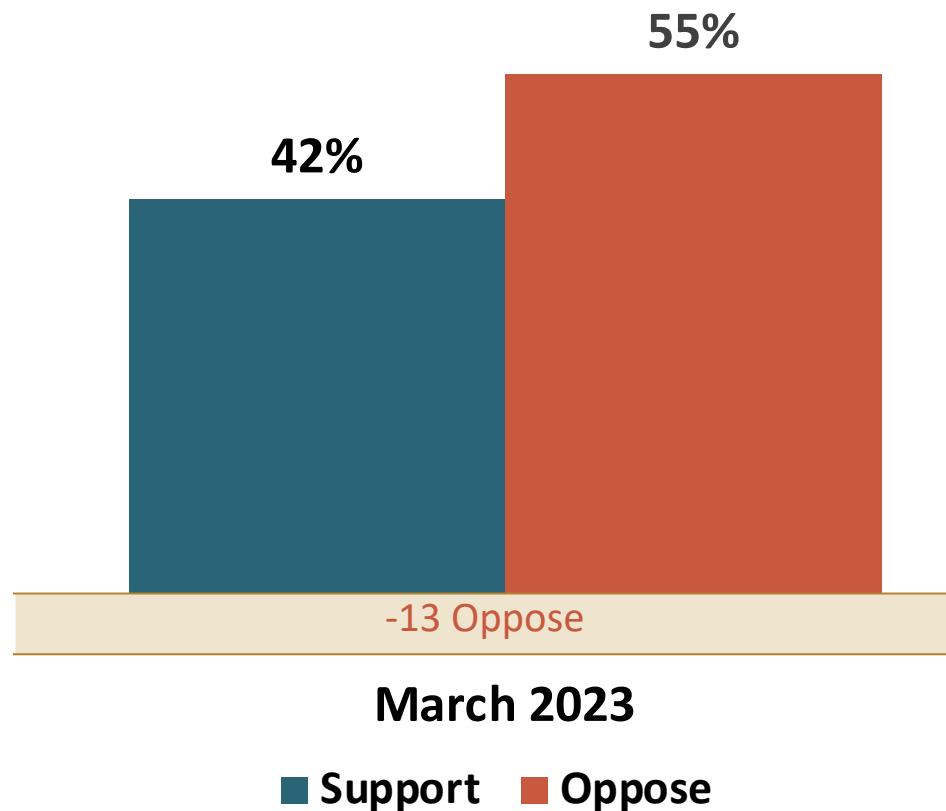
■ Support ■ Oppose

Interesting data by subgroup here. Unaffiliated voters are among the most support subgroup of legalizing sports betting in the state.

	Sports Betting		Casino Gaming	
	Support	Oppose	Support	Oppose
Republicans	37%	55%	44%	49%
Unaffiliateds	57%	32%	52%	36%
Democrats	43%	45%	58%	34%
African Americans	46%	43%	62%	31%
White Men Ages 18-54	67%	26%	61%	34%
White Men Ages 55+	37%	53%	54%	40%
White Women Ages 18-54	43%	40%	47%	36%
White Women Ages 55+	35%	61%	33%	58%
White Men Non-College	51%	43%	55%	43%
White Men College+	55%	34%	61%	29%
White Women Non-College	40%	50%	40%	49%
White Women College+	38%	51%	40%	47%
White Evangelicals	36%	59%	37%	58%

Constitutional carry is popular with Republicans and White men, but faces opposition with most every other voter group.

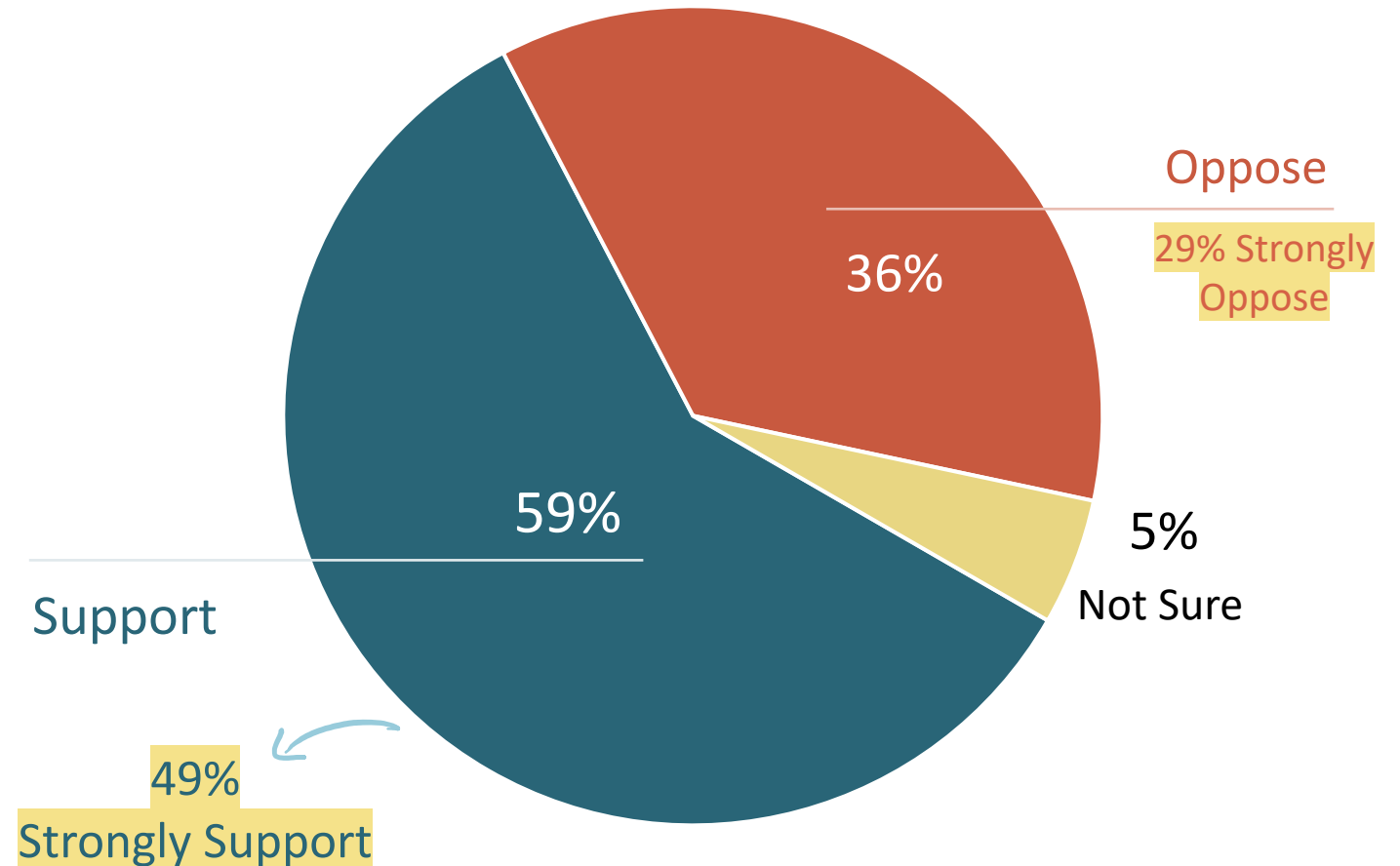
“Allowing any adult citizen in North Carolina to carry a handgun without a concealed handgun permit, unless they are otherwise prohibited from having a gun”



	Support	Oppose
Republicans	68%	30%
Unaffiliateds	42%	53%
Democrats	15%	83%
African Americans	27%	69%
White Men Ages 18-54	57%	40%
White Men Ages 55+	62%	38%
White Women Ages 18-54	32%	65%
White Women Ages 55+	39%	58%
White Men Non-College	71%	29%
White Men College+	45%	51%
White Women Non-College	49%	48%
White Women College+	19%	79%

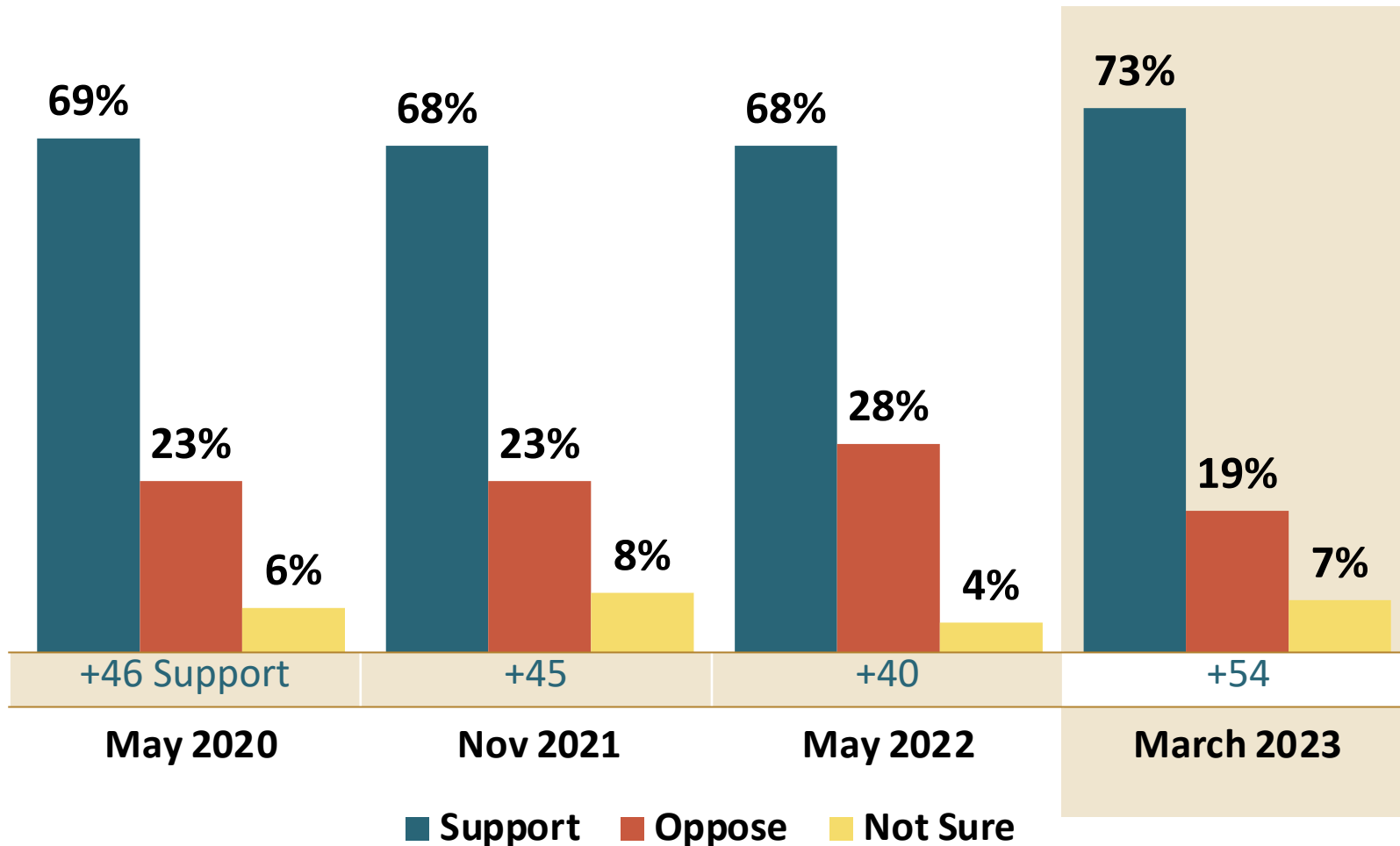
After hearing an explanation of the Parents' Bill of Rights, voters support it by a wide margin, with half of voters *strongly* supporting the bill.

“As you may know, the General Assembly in Raleigh is considering a Parents' Bill of Rights that would allow parents to review the curriculum their children are taught in public schools. It would require public school employees to disclose any information about their children's mental or physical health to parents and to inform parents if their children adopt a different gender or different gender pronouns in school. It would also prohibit sex education or instruction on sexual orientation and gender identity in kindergarten through fourth grade. Knowing this, do you support or oppose the Parents' Bill of Rights?”



Expanding Medicaid continues to grow in popularity, and even a majority of Republicans support the idea.

“As you may know, Medicaid is a taxpayer-funded program that provides healthcare coverage to low-income people. Do you support or oppose expanding the state’s Medicaid program to cover more people in North Carolina?”

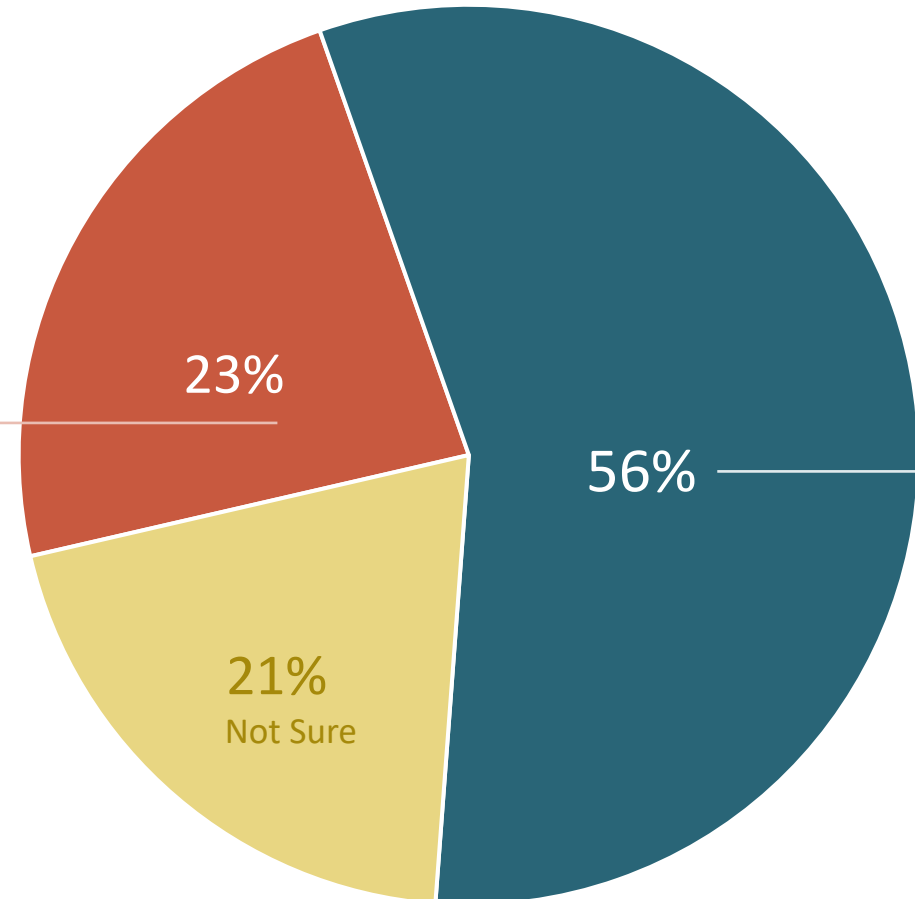


	% Support
Republicans	55%
Unaffiliateds	72%
Democrats	92%
African Americans	88%
White Men Ages 18-54	71%
White Men Ages 55+	66%
White Women Ages 18-54	71%
White Women Ages 55+	70%
White Men Non-College	73%
White Men College+	63%
White Women Non-College	72%
White Women College+	69%

A majority of voters in the state believe Certificate of Need laws do not make sense when given both sides of the issue.

“As you may know, North Carolina has Certificate of Needs laws that require hospitals and other health care providers to obtain permission from the state in order to open or expand many new health care and medical services. Which of the following comes closer to your own opinion, even if neither is exactly right?”

Certificate of Need laws make sense because they allow state government to control and determine the availability of health care services in each community

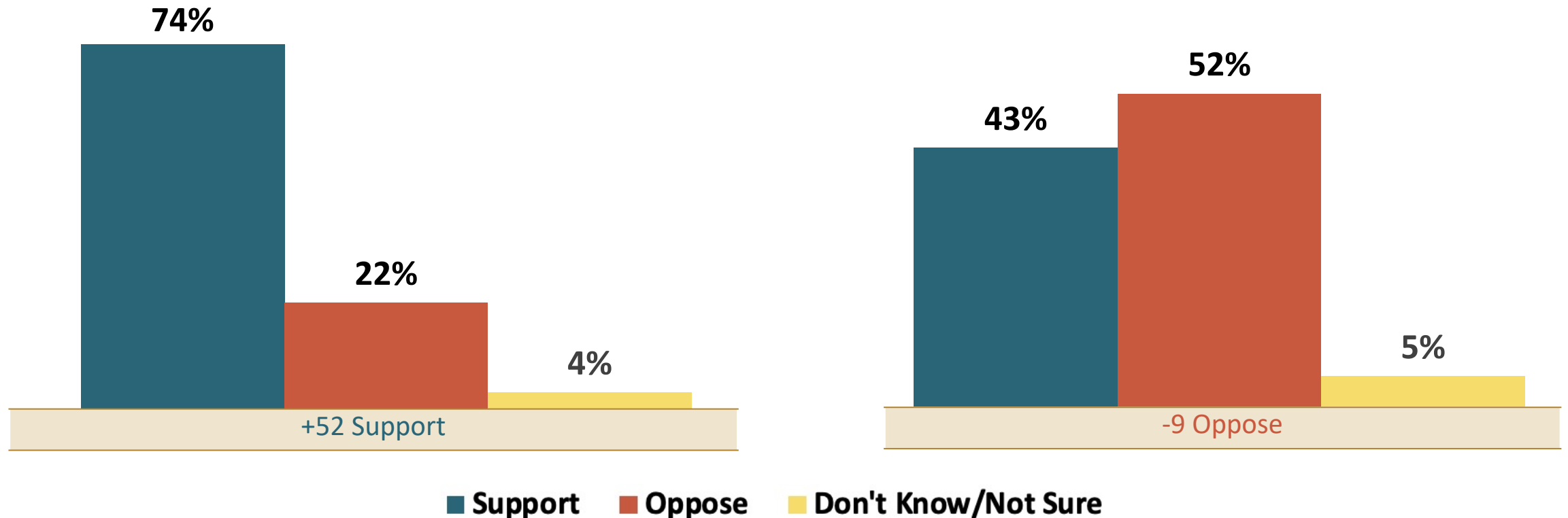


Certificate of Need laws do not make sense because they add an unneeded layer of bureaucracy that prevents or delays doctors from opening health care facilities in communities that need them

There is solid support for a new fee on EVs, but support for tolls lag behind.

“On a different topic, as you may know, much of our state’s transportation budget, including investments in new roads and maintenance work on existing roads, is funded by a tax that drivers pay on gas when they fill up their tanks. Would you SUPPORT or OPPOSE a new fee of \$400 (four hundred dollars) per year on electric and hybrid vehicles so that owners of these cars and trucks are also paying their fair share of road maintenance expenses?”

“Do you support or oppose increasing the use of tolls to allow the state of North Carolina to build more new roads and bridges?”



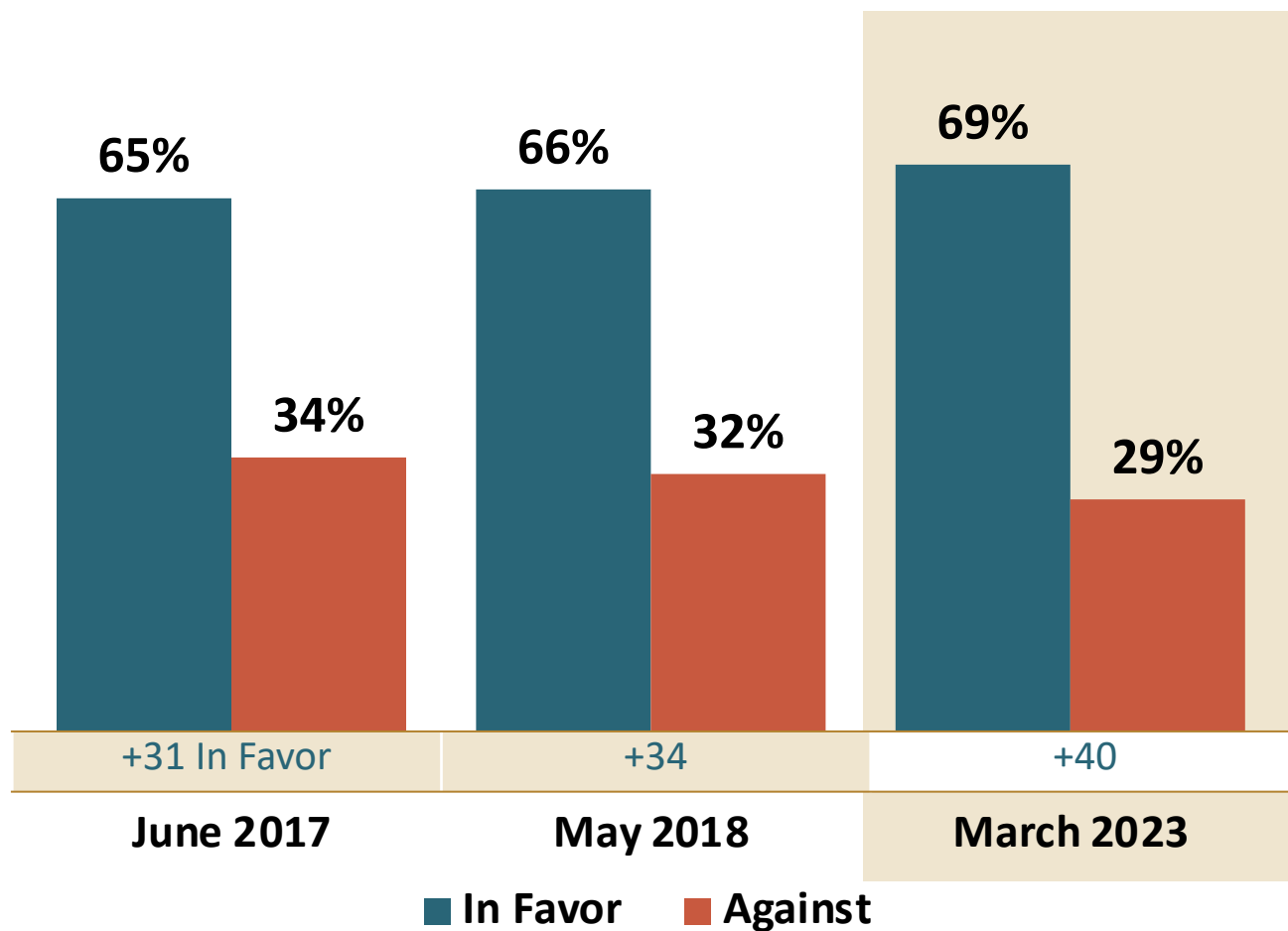


POTENTIAL AMENDMENTS



As we have seen before, Voter ID is overwhelmingly popular, including two-thirds support from Unaffiliateds, 44% from Democrats, and 43% African Americans.

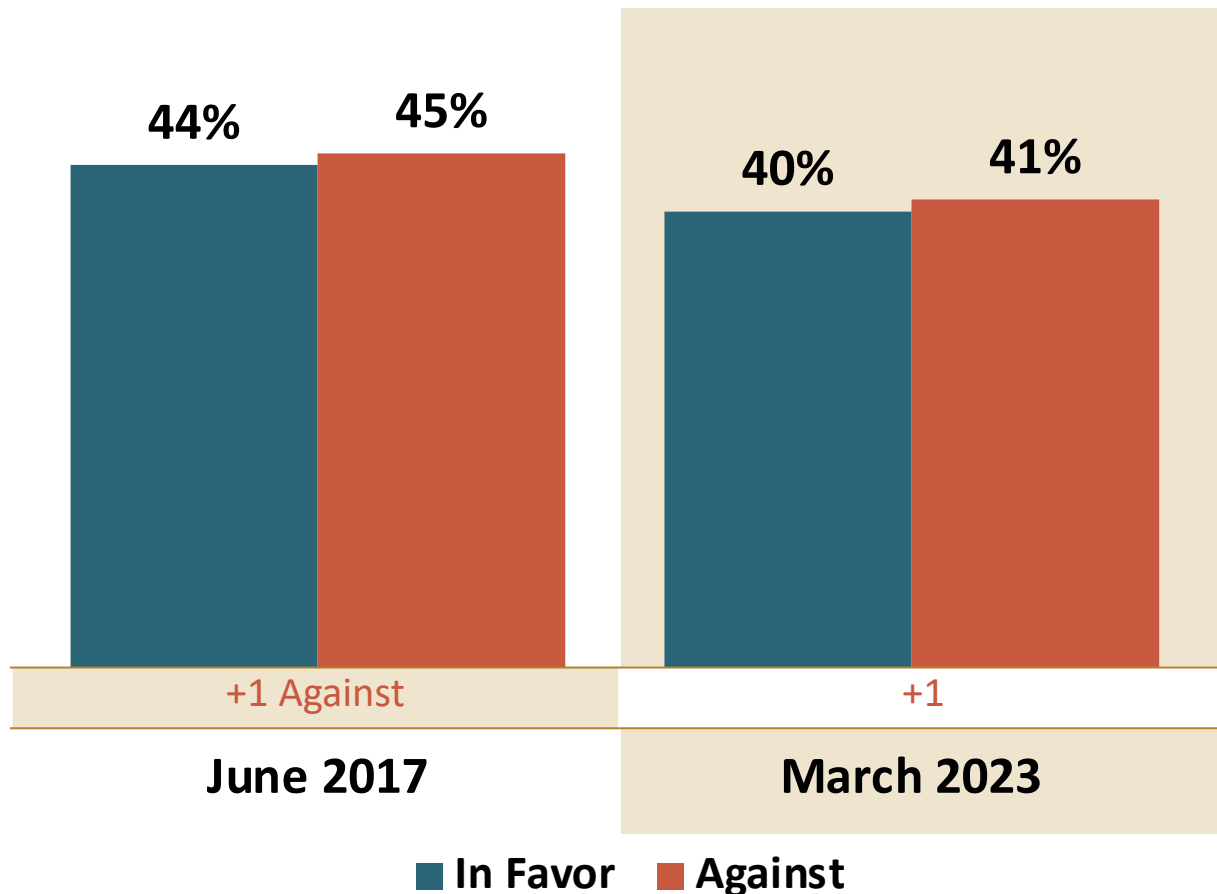
“For each potential amendment below, please select if you would vote YES, IN FAVOR or NO, AGAINST each one if the election were being held today: **Require voters to provide photo identification before voting.**”



	In Favor
Republicans	97%
Unaffiliateds	67%
Democrats	44%
African Americans	43%
White Men Ages 18-54	72%
White Men Ages 55+	77%
White Women Ages 18-54	74%
White Women Ages 55+	81%
White Men Non-College	84%
White Men College+	62%
White Women Non-College	89%
White Women College+	60%

Voters continue to be evenly split on repealing the literacy test.

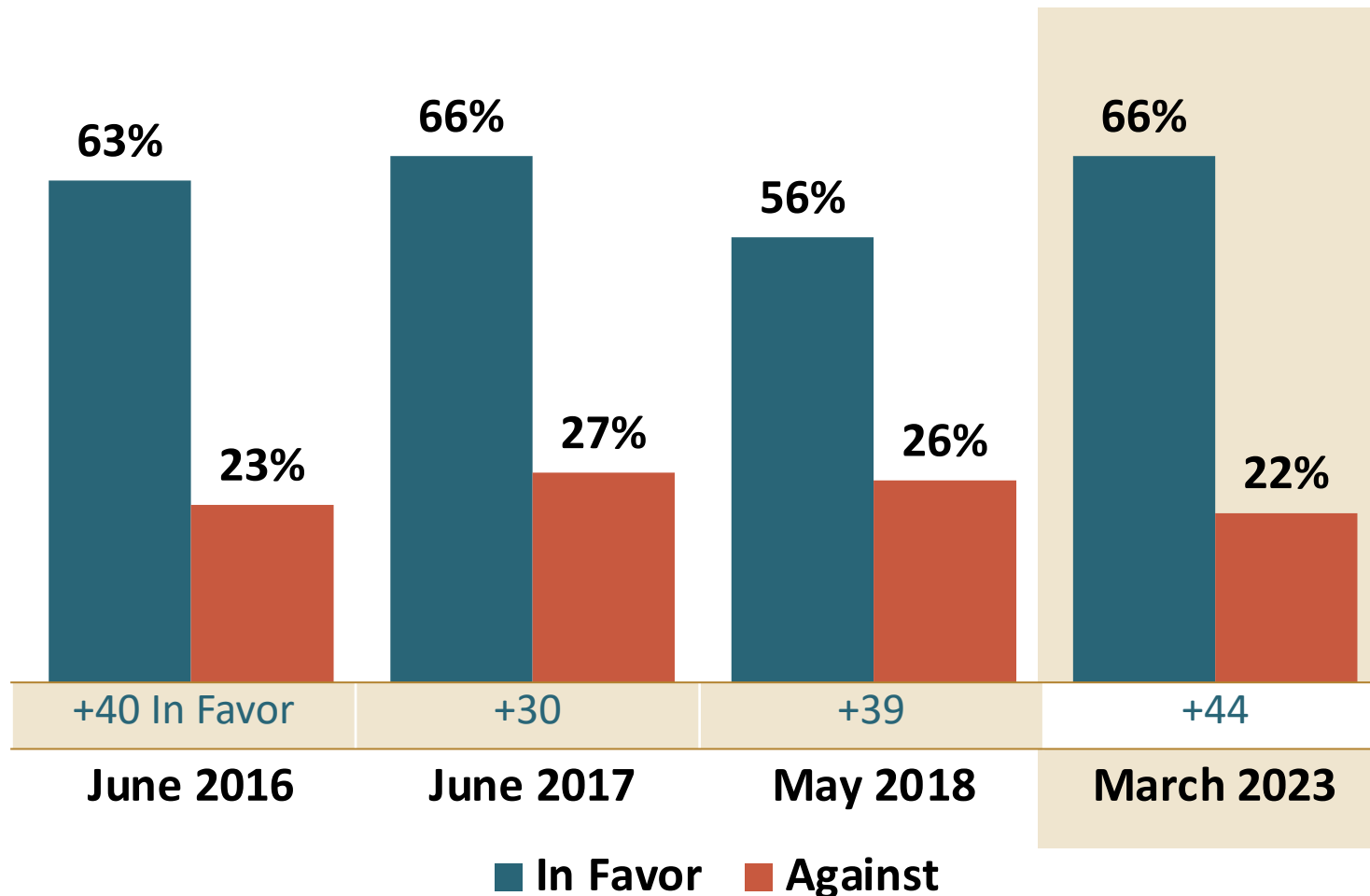
“For each potential amendment below, please select if you would vote YES, IN FAVOR or NO, AGAINST each one if the election were being held today: **Repeal the literacy requirement as a requirement to vote.**”



	In Favor	Against
Republicans	33%	47%
Unaffiliateds	38%	41%
Democrats	48%	36%
African Americans	48%	41%
White Men Ages 18-54	40%	46%
White Men Ages 55+	37%	38%
White Women Ages 18-54	37%	41%
White Women Ages 55+	38%	40%
White Men Non-College	35%	42%
White Men College+	44%	41%
White Women Non-College	38%	39%
White Women College+	37%	44%

Voters also support capping the allowable income tax rate, with majorities every major subgroup supporting the move.

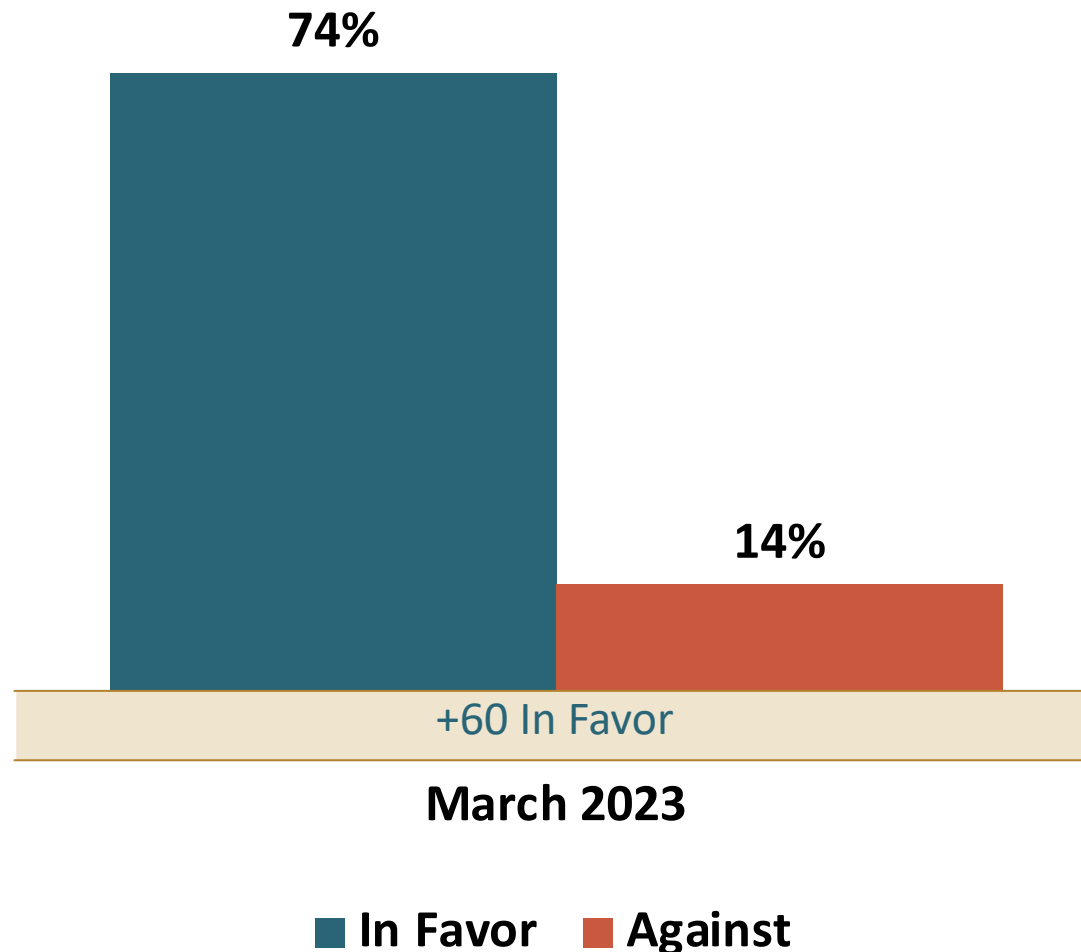
“Reduce the maximum allowable income tax rate in North Carolina from seven percent to four percent.”



	In Favor
Republicans	82%
Unaffiliateds	58%
Democrats	59%
African Americans	72%
White Men Ages 18-54	64%
White Men Ages 55+	67%
White Women Ages 18-54	61%
White Women Ages 55+	68%
White Men Non-College	69%
White Men College+	61%
White Women Non-College	71%
White Women College+	55%

There is considerable voter support for adopting term limits for North Carolina Supreme Court Justices.

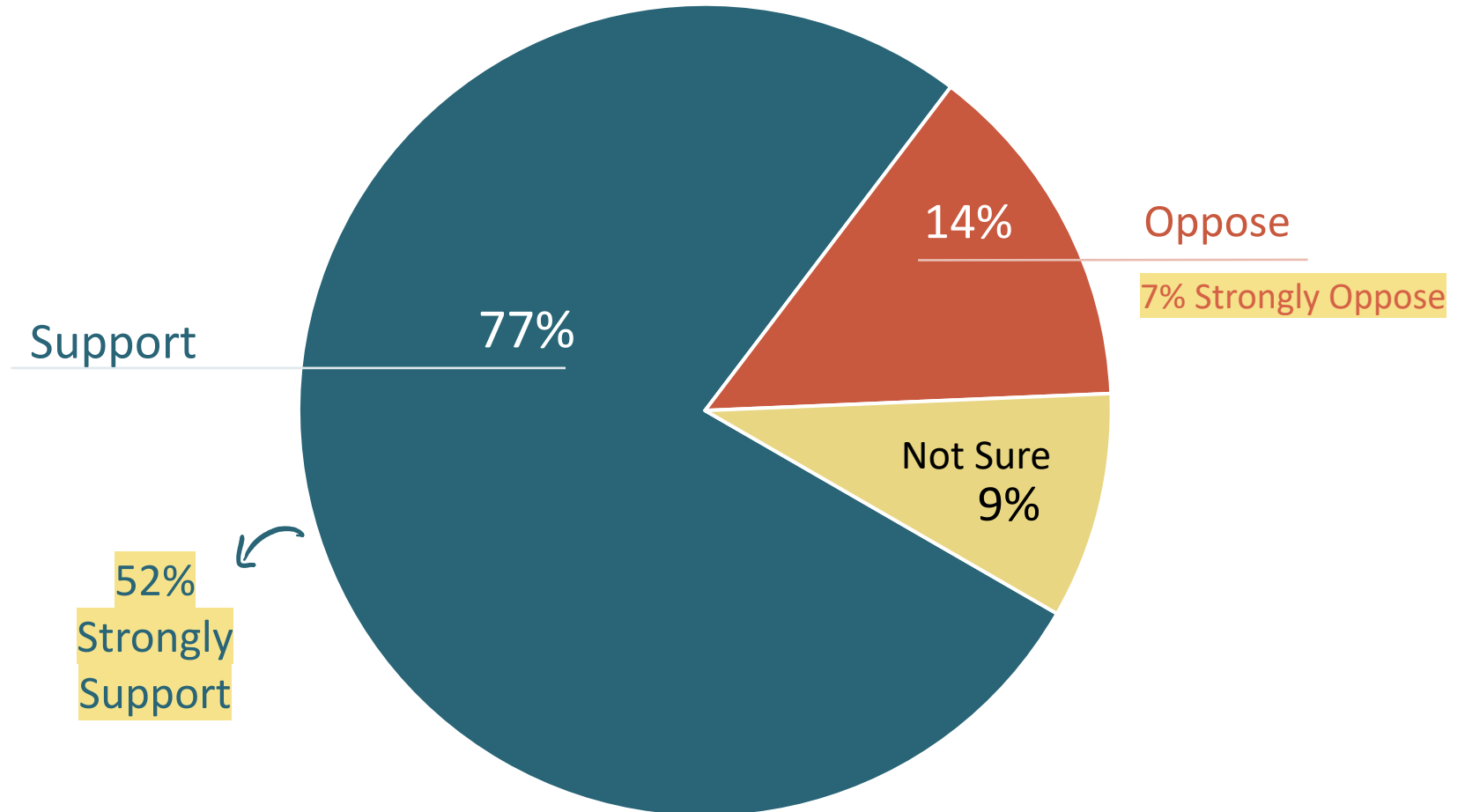
“Adopt term limits for North Carolina Supreme Court Justices limiting them to serving two, 12-year terms.”



	In Favor
Republicans	71%
Unaffiliateds	75%
Democrats	77%
African Americans	76%
White Men Ages 18-54	75%
White Men Ages 55+	69%
White Women Ages 18-54	74%
White Women Ages 55+	79%
White Men Non-College	67%
White Men College+	78%
White Women Non-College	75%
White Women College+	80%

Over three-quarters of voters support electing members of the State Board of Education, with a majority strongly supporting the change.

“Currently, North Carolina’s State Board of Education members who oversee our state’s public schools are chosen by the governor. Would you support or oppose allowing voters to elect members of the State Board of Education rather than having the governor appoint them?”



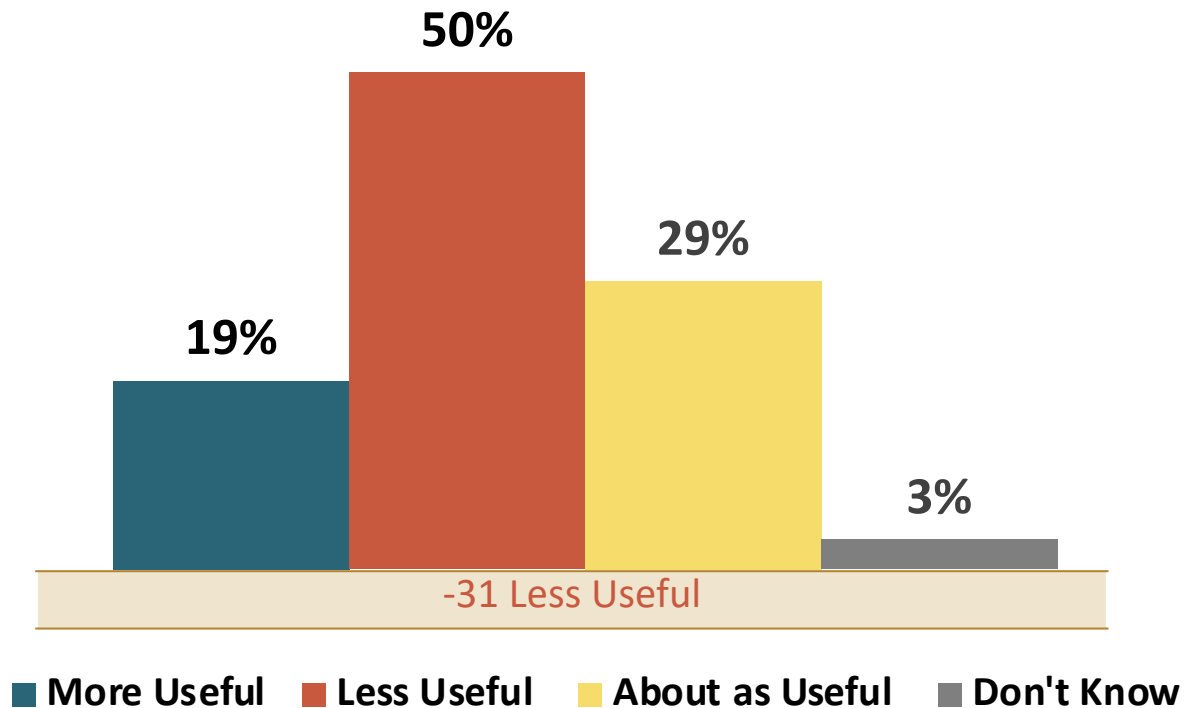


A LOOK AT EDUCATION

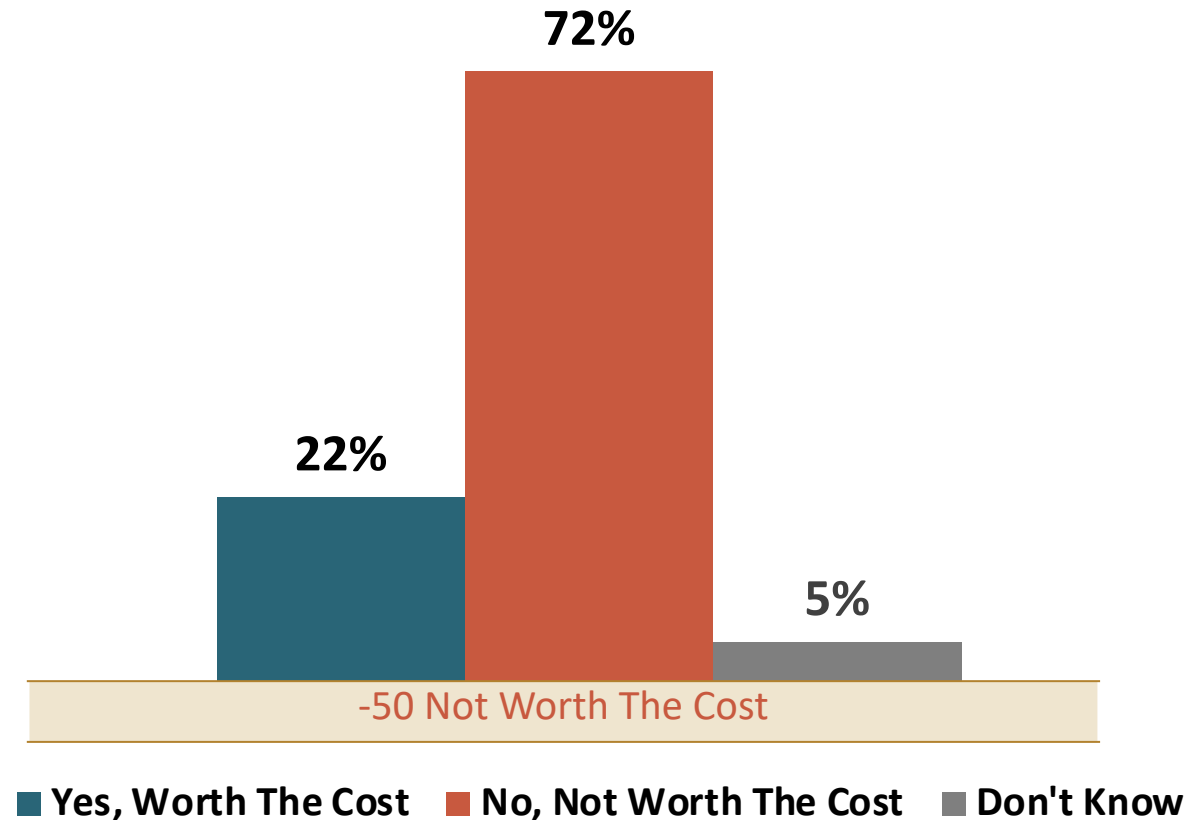


Voters see a college education as less useful today than a decade ago and most don't believe a college degree is generally worth the cost.

“On a different topic, do you think a university or college education is more useful or less useful to an individual today than it was 10 or 15 years ago, or is it about as useful today as it was back then?”



“Do you believe that for most students a university education is worth the money it costs and student debt they take on, or is it not worth the cost and debt?”



White non-college voters and parents are even more likely to discount the utility and value of a college education.

Utility Of University Education Today

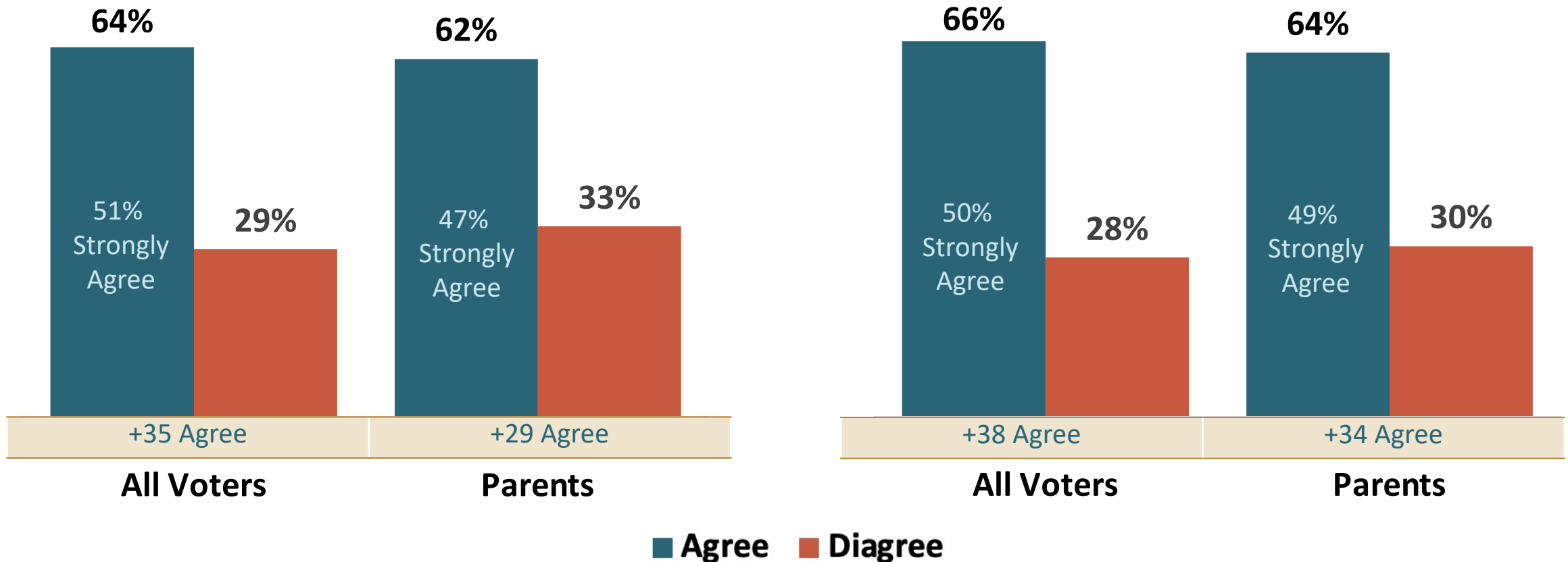
University Value

	More Useful	Less Useful	About As Useful	Worth The Cost	Not Worth The Cost
White Men Non-College	6%	77%	14%	9%	88%
White Men College+	19%	40%	38%	35%	58%
White Women Non-College	24%	49%	26%	17%	79%
White Women College+	15%	41%	43%	33%	56%
African Americans	30%	40%	26%	27%	67%
Parents	15%	53%	29%	23%	74%

Nearly two-thirds of voters agree political correctness and wokeness have gone too far in North Carolina's schools and universities.

"Political correctness and wokeness have gone too far in our state's public Kindergarten through 12th grade schools"

"Political correctness and wokeness have gone too far in our state's public colleges and universities"



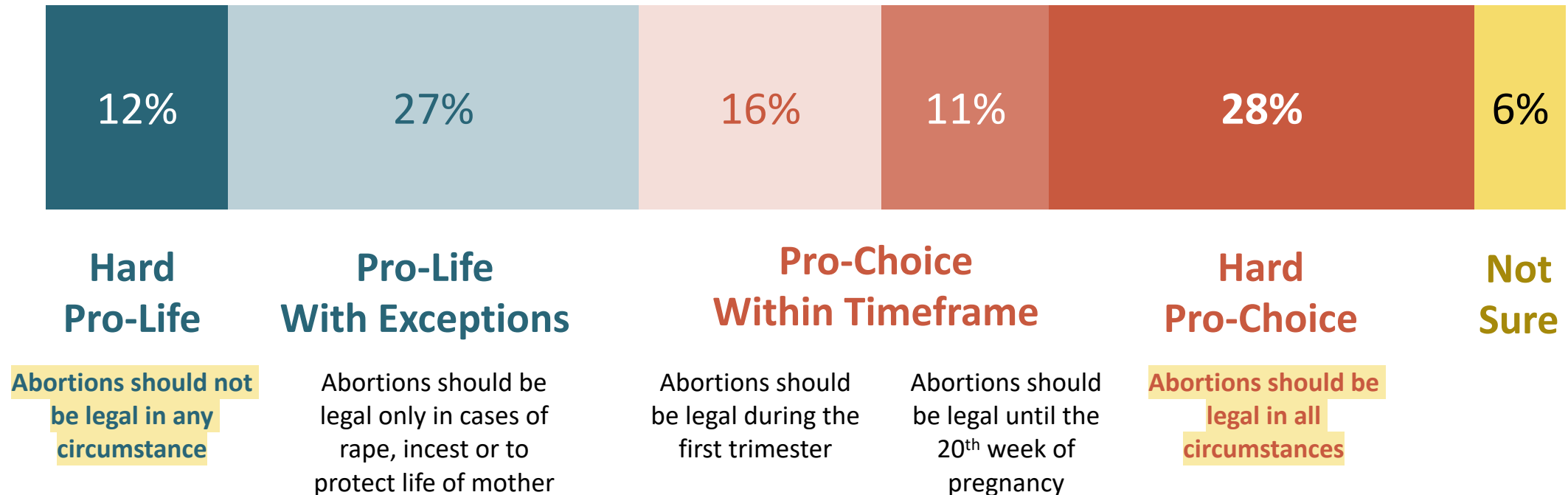


ABORTION AFTER DOBBS



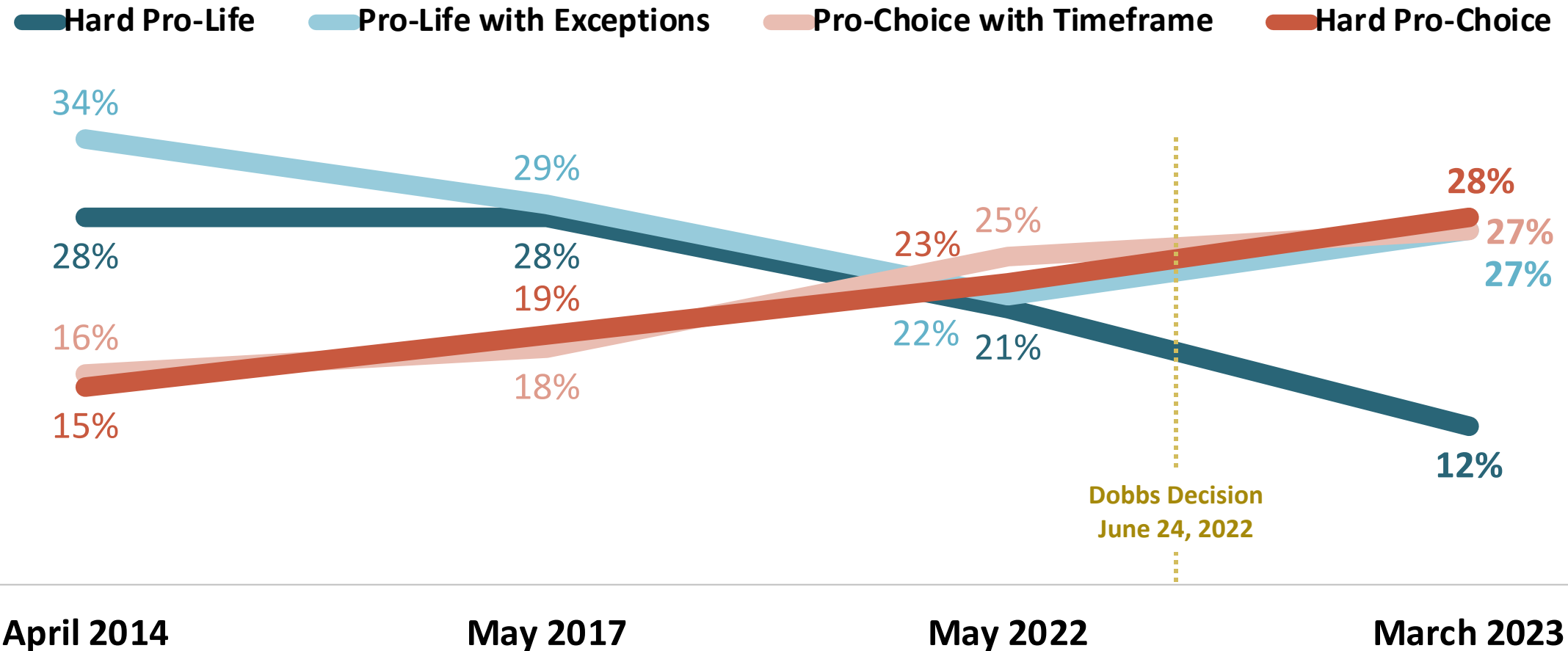
Most North Carolinians say abortion should be legal at some point, but the challenge is in the details here.

“Which ONE of the following statements most closely describes your position on the issue of abortion?”



We have seen a noticeable shift in attitudes toward abortion since the *Dobbs* was handed down.

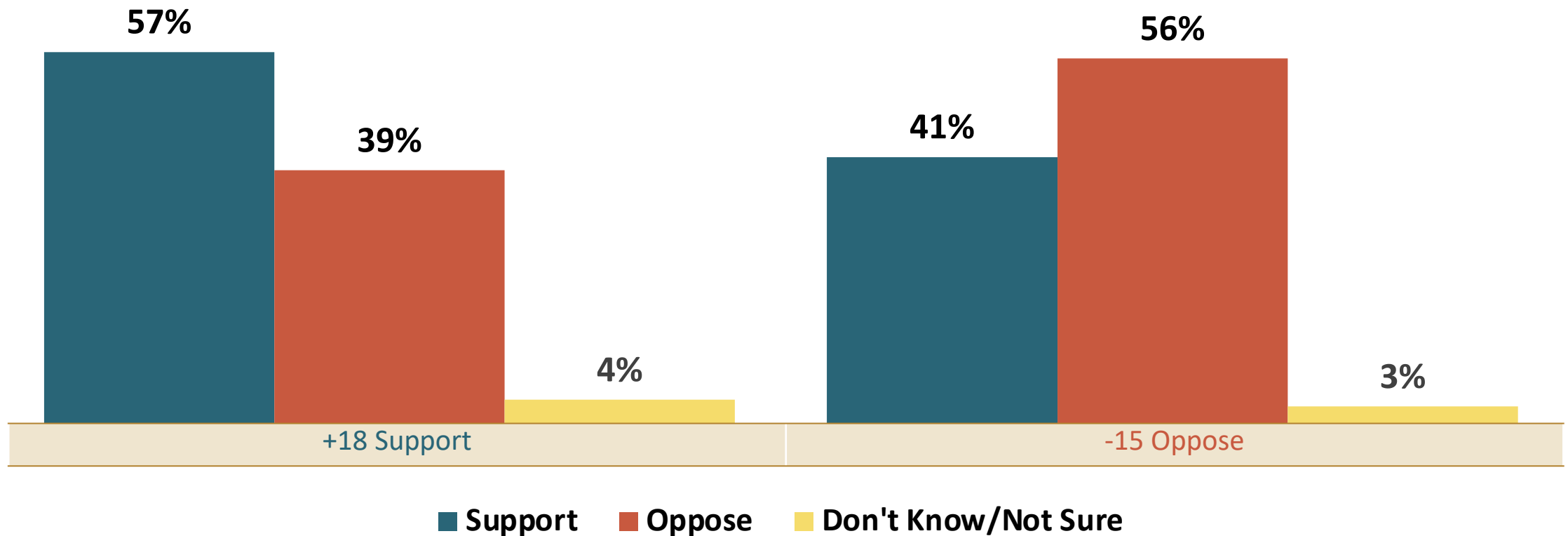
Abortion Trend



A majority support a ban on abortion after the first trimester with exceptions, while fewer support legalizing abortion at any time.

“Would you support or oppose the North Carolina General Assembly passing a bill to prohibit abortions after the first trimester—that is, after 12 weeks of pregnancy—except in cases of rape, incest, or where the life of the mother is in danger?”

“Would you support or oppose the North Carolina General Assembly passing a bill to legalize abortion at any point in a woman’s pregnancy for any reason?”



While Unaffiliateds are split on these, older White voters support a first trimester ban and oppose a more hard pro-choice position.

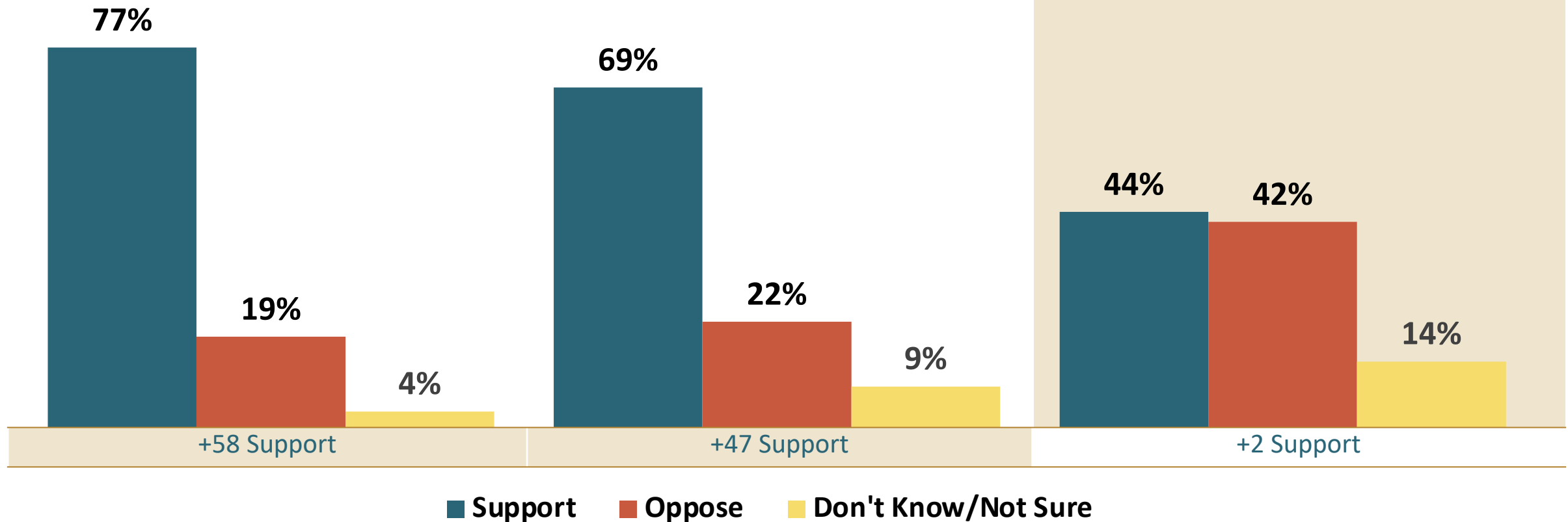
	First Trimester w/ Exceptions		Any Time for Any Reason	
	Support	Oppose	Support	Oppose
Base Republicans	80%	18%	11%	87%
Soft Republicans	65%	29%	22%	78%
Unaffiliateds	51%	43%	43%	53%
Soft Democrats	38%	58%	57%	35%
Base Democrats	44%	52%	68%	28%
African Americans	51%	40%	50%	44%
White Men Ages 18-54	52%	47%	34%	62%
White Men Ages 55+	60%	37%	32%	63%
White Women Ages 18-54	56%	43%	50%	50%
White Women Ages 55+	65%	31%	31%	65%
White Evangelicals	77%	20%	18%	81%

Over-the-counter birth control and a variation of an adoption tax credit receive broad voter support. (But positioning matters here.)

“Would you support or oppose a state law that allows women to receive birth control pills over the counter at a pharmacy instead of requiring a prescription from a doctor?”

“Would you support or oppose providing an adoption tax credit to mothers in North Carolina who choose to place their children for adoption instead of having an abortion?”

“Would you support or oppose providing an adoption tax credit to mothers in North Carolina who choose to place their children for adoption?”



A couple of these proposals receive strong bipartisan support.

	Over-The-Counter Birth Control		Adoption Tax Credit		Adoption Tax Credit Instead of Abortion	
	Support	Oppose	Support	Oppose	Support	Oppose
Base Republicans	68%	27%	41%	45%	94%	5%
Soft Republicans	77%	19%	49%	33%	81%	16%
Unaffiliateds	84%	11%	50%	39%	58%	29%
Soft Democrats	74%	20%	37%	42%	41%	48%
Base Democrats	79%	19%	40%	46%	62%	25%
African Americans	70%	25%	45%	43%	62%	27%
White Men Ages 18-54	78%	17%	58%	32%	67%	28%
White Men Ages 55+	78%	17%	45%	43%	83%	11%
White Women Ages 18-54	91%	8%	40%	43%	61%	28%
White Women Ages 55+	70%	27%	42%	47%	87%	8%
White Evangelicals	70%	27%	59%	32%	90%	6%

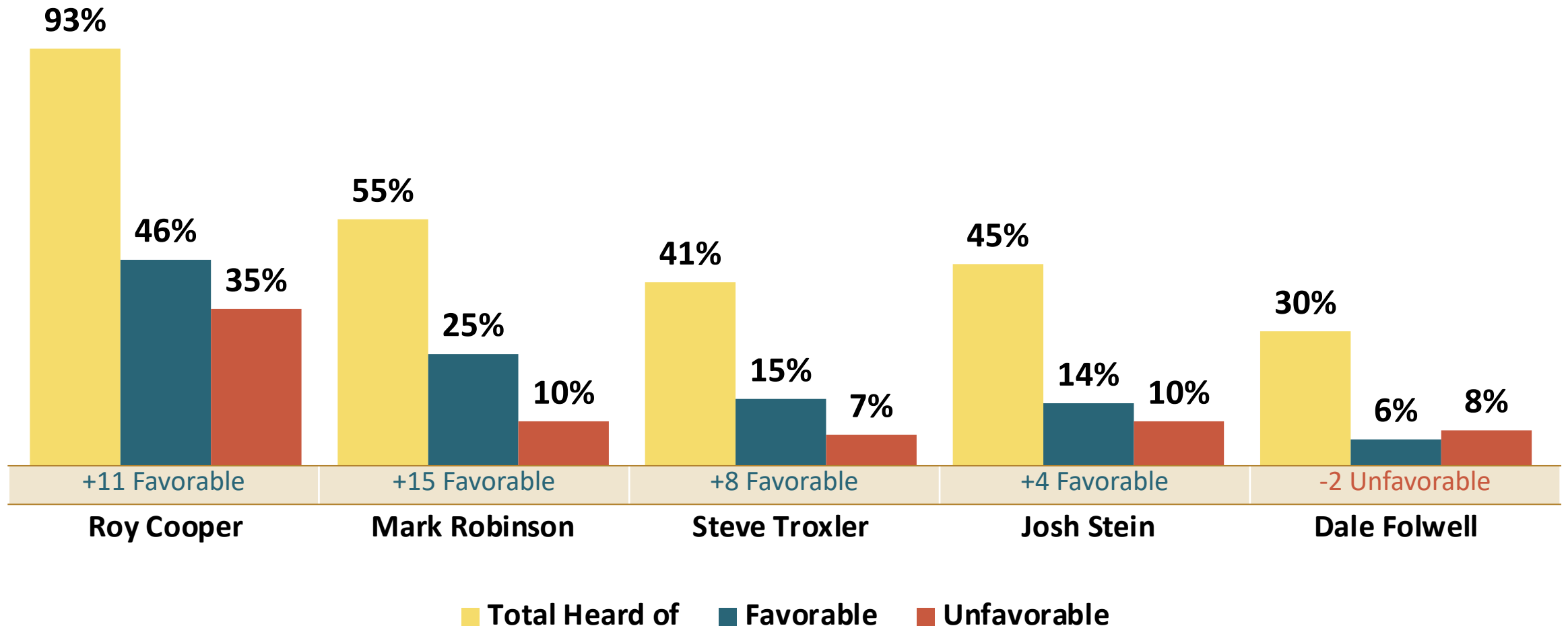


A LOOK AT THE POLITICAL ENVIRONMENT



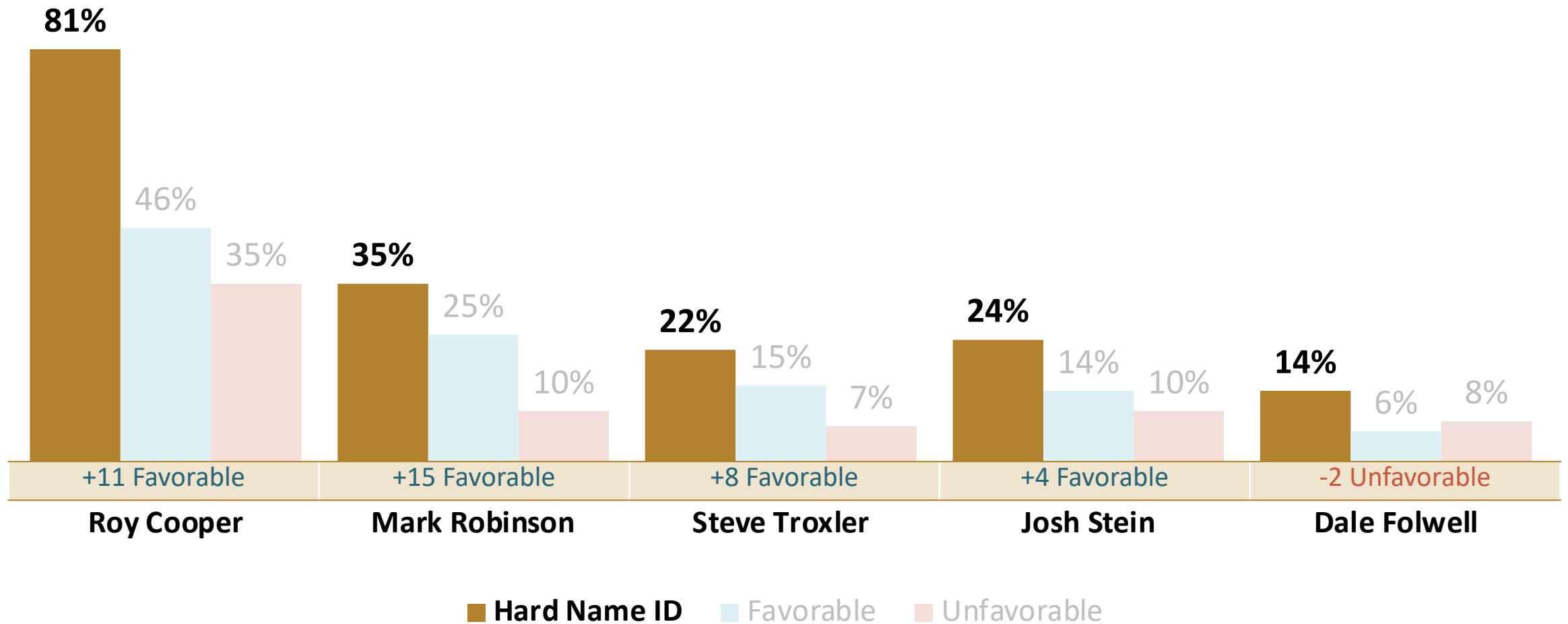
Governor Cooper and Lieutenant Governor Robinson have similar net favorable image ratings, despite the familiarity gap.

Summary of Key Image Ratings of Statewide Office Holders



Outside of the Governor, none of the other statewide officeholders we tested have high hard name ID recall.

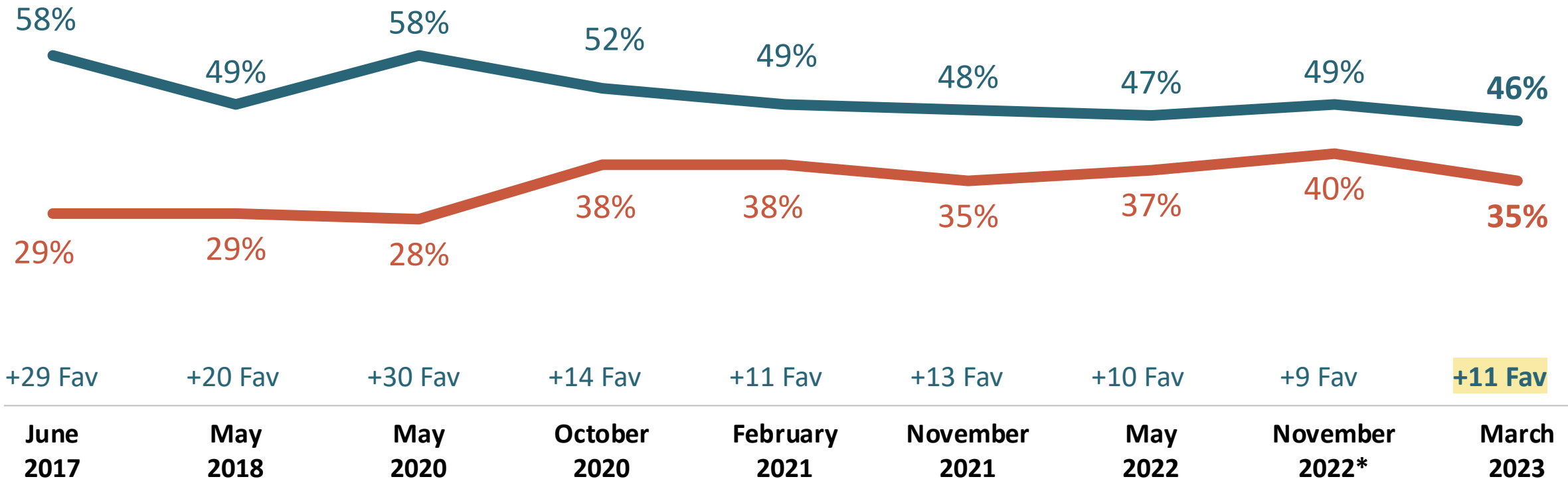
% Hard Name Identification (% Who Have An Opinion Of Them)



Looking at the trend data, Governor Cooper's favorables are at their lowest levels since June 2017.

Roy Cooper Image Trend

— Favorable — Unfavorable

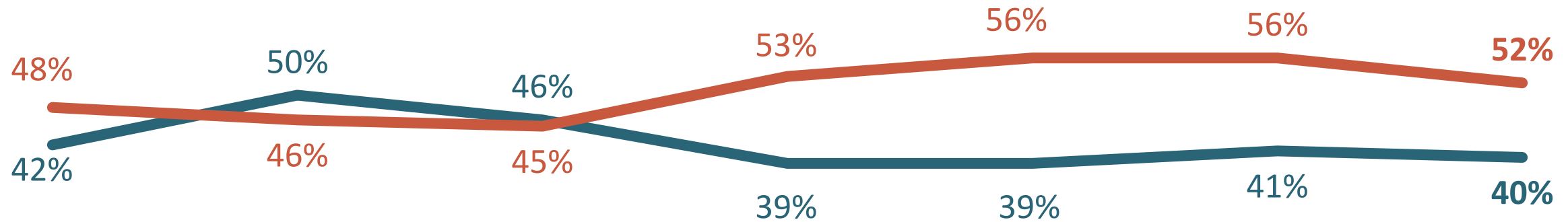


*NOTE: Survey consisted of 600 actual 2022 voters

President Biden's image remains steady and steadily negative.

Joe Biden Image Trend

— Favorable — Unfavorable



+6 Unfav

+4 Fav

+1 Fav

-14 Unfav

-17 Unfav

-15 Unfav

-12 Unfav

May
2020

October
2020

February
2021

November
2021

May
2022

November
2022*

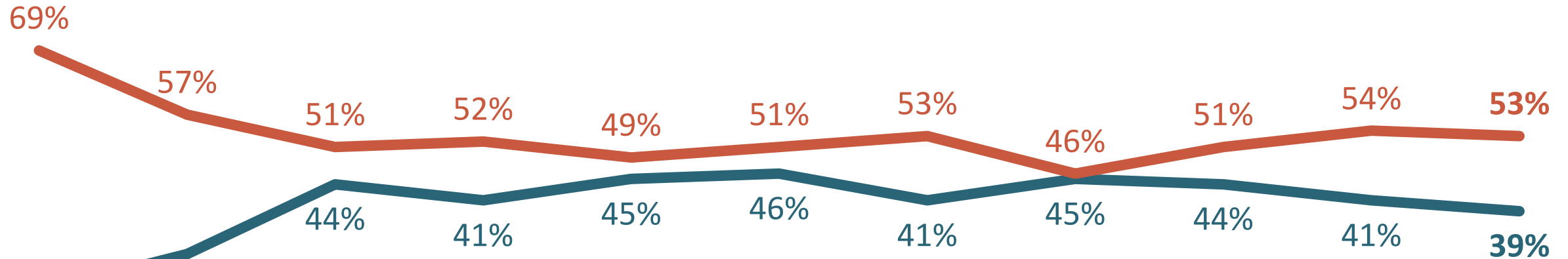
March
2023

*NOTE: Survey consisted of 600 actual 2020 voters

Trump's image is similar to what we saw in our November 2022 post-elect.

Donald Trump Image Trend

— Favorable — Unfavorable



-45 Unfav -26 Unfav -7 Unfav -11 Unfav -4 Unfav -5 Unfav -12 Unfav -1 Unfav -7 Unfav -13 Unfav **-14 Unfav**

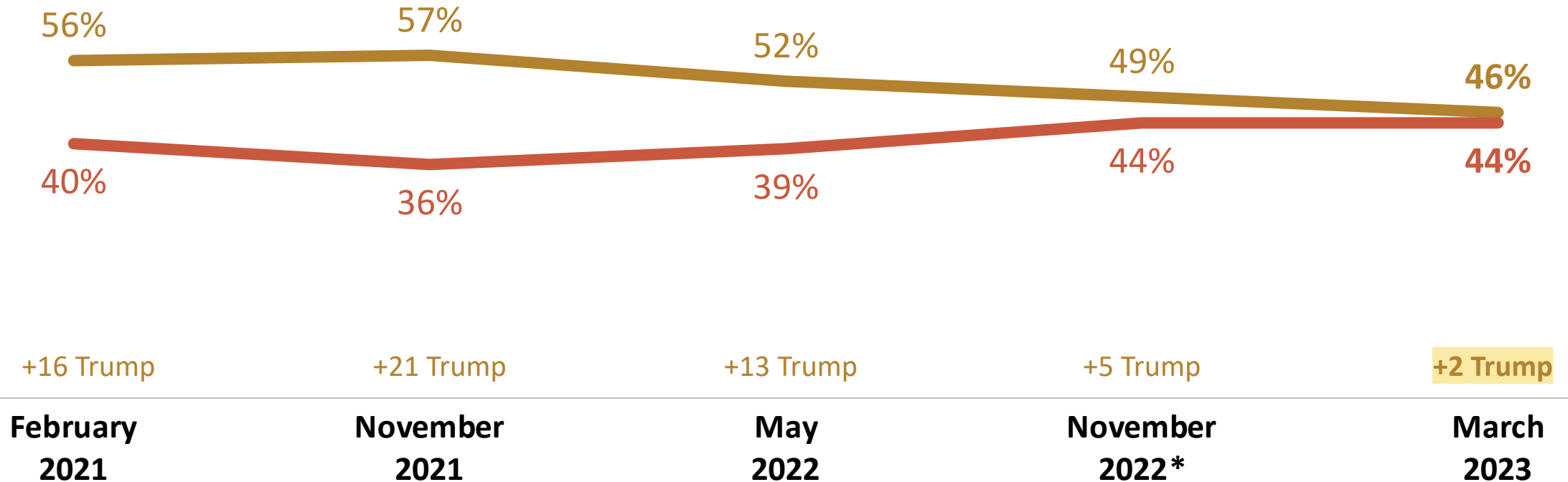
April 2016 June 2016 June 2017 May 2018 May 2020 October 2020 February 2021 November 2021 May 2022 November 2022* March 2023

*NOTE: Survey consisted of 600 actual 2022 voters

Since the 2020 election, we've seen a steady decline in the percentage of right-leaning voters saying they are more of a Trump supporter.

Asked Among Republicans and Republican-Leaning Unaffiliateds: "And do you consider yourself to be more of a supporter of Donald Trump, or more of a supporter of the Traditional Republican Party?"

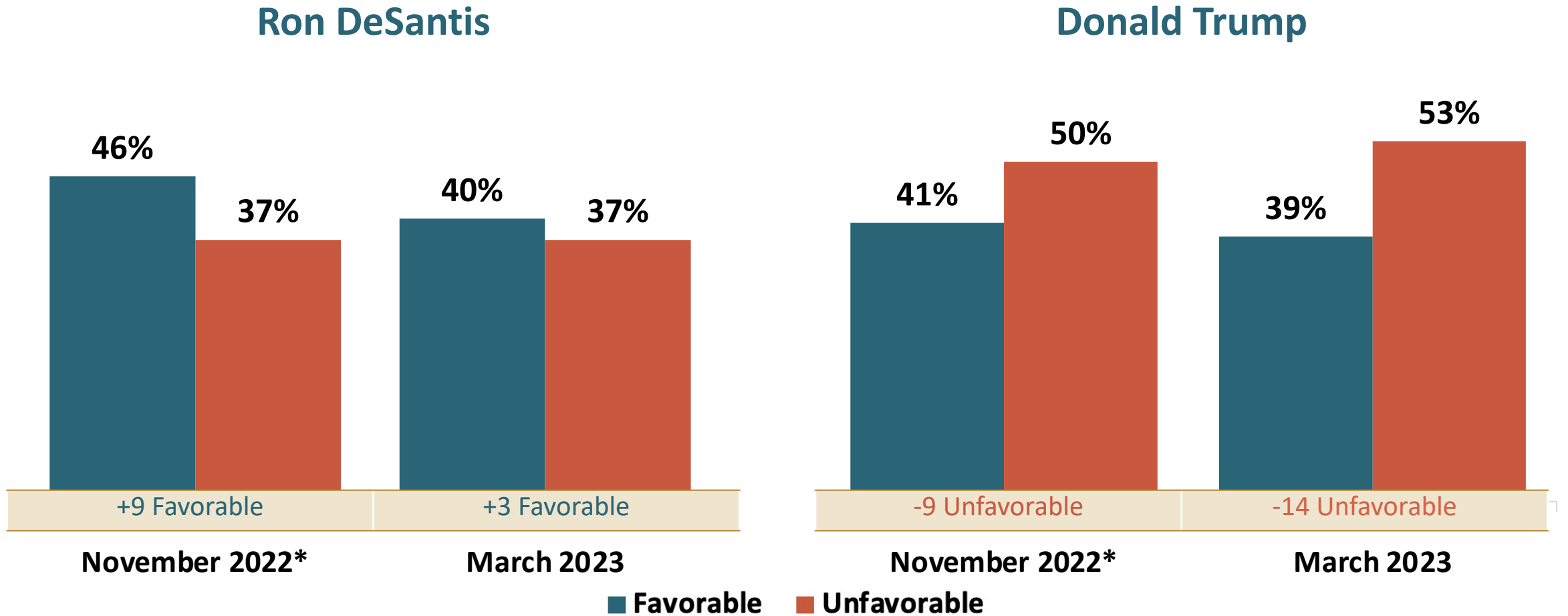
— Trump — Republican Party



*NOTE: Survey consisted of 600 actual 2022 voters

Governor DeSantis has noticeably lower negatives than Trump among all voters.

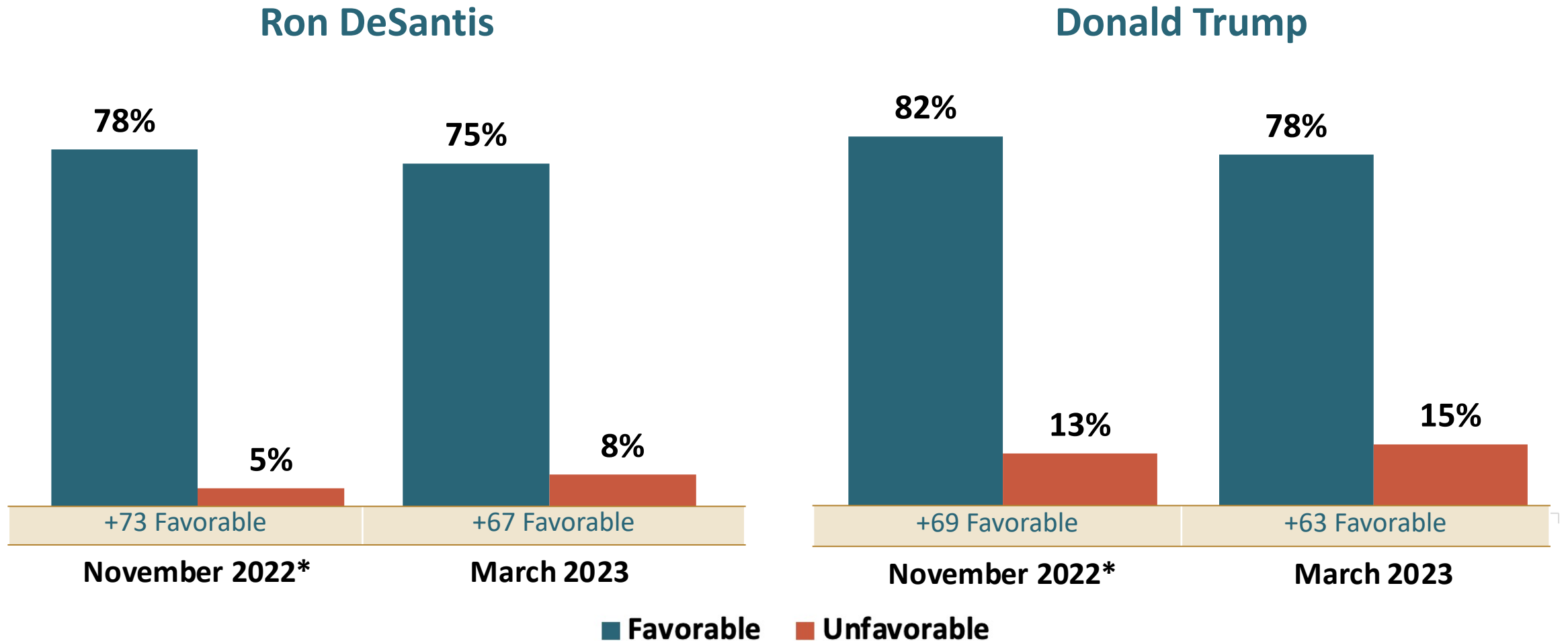
Key Image Ratings



*NOTE: Survey consisted of 600 actual 2022 voters

Among Republicans, DeSantis and Trump have similar image numbers.

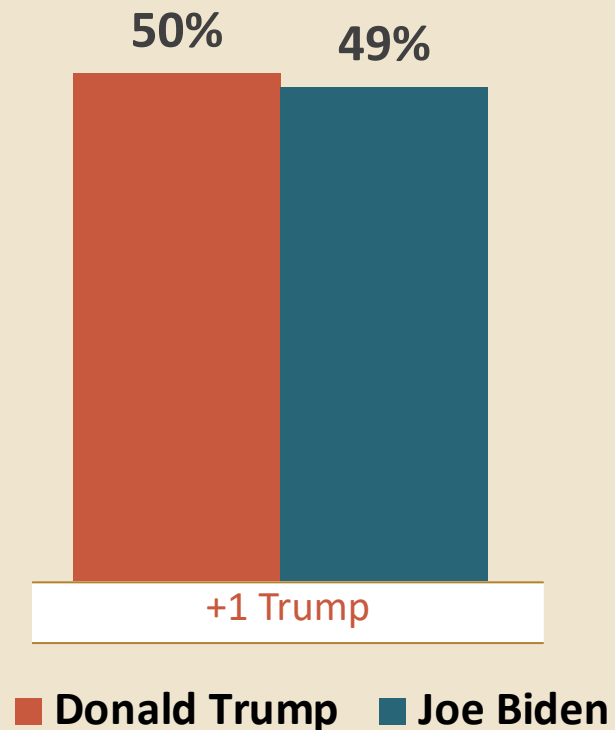
Key Image Ratings Among Republicans



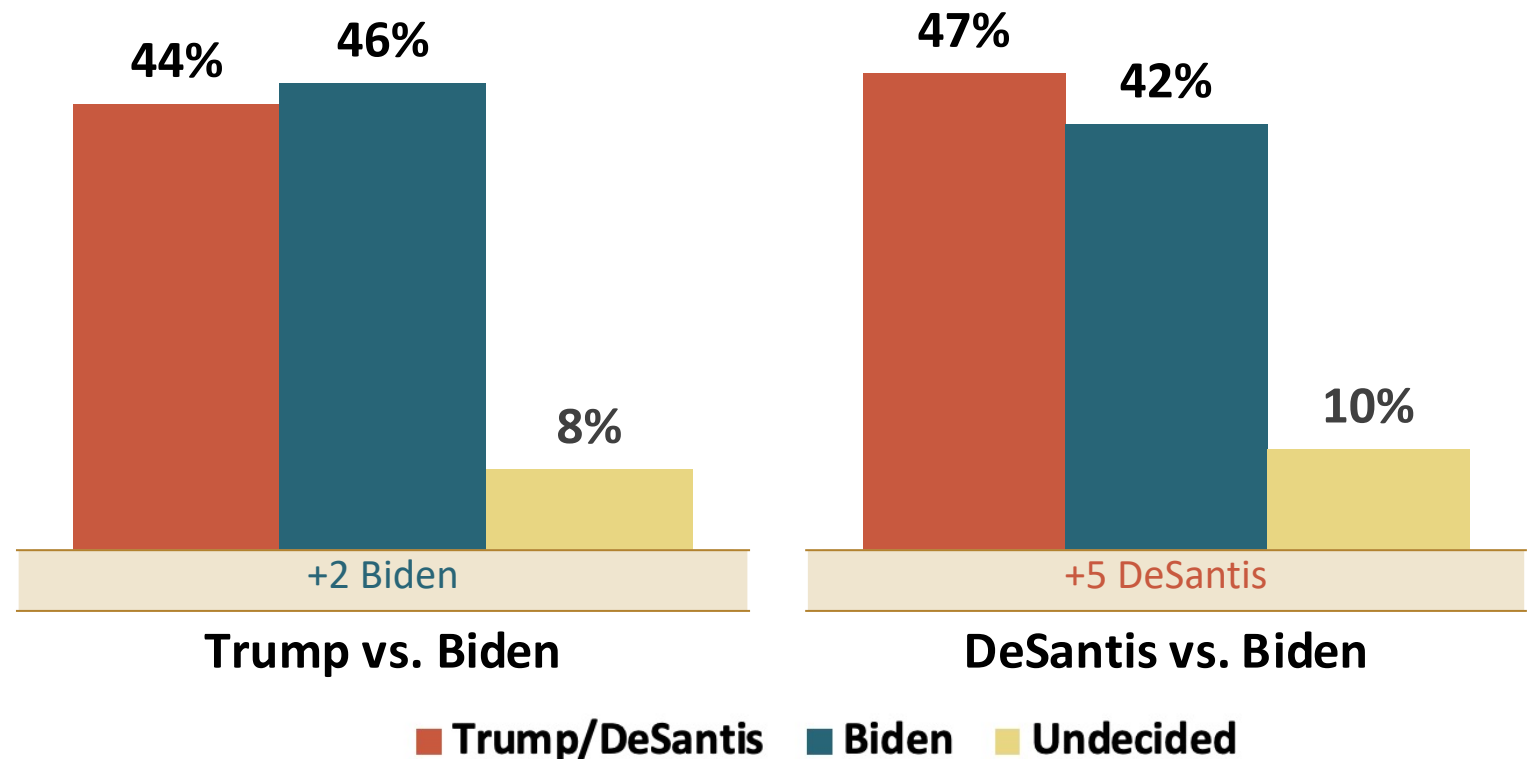
*NOTE: Survey consisted of 600 actual 2022 voters

While a potential Trump-Biden rematch looks tight (again), DeSantis fares a few points better against the President.

Actual 2020 Results



“If the 2024 election for President were being held today, for whom would you vote between...”



DeSantis performs better against Biden (than Trump) among Soft Republicans, Unaffiliateds, and White women.

2024 Republican Presidential Primary Ballot by Key Groups

	Trump	Biden	Net Biden	DeSantis	Biden	Net Biden
Base Republicans	93%	1%	-92	93%	1%	-92
Soft Republicans	69%	9%	-60	83%	9%	-74
Unaffiliateds	41%	45%	+4	45%	35%	-10
Soft Democrats	19%	60%	+41	21%	59%	+38
Base Democrats	0%	98%	+98	1%	97%	+97
White Men	60%	34%	-26	63%	33%	-30
White Women	50%	38%	-12	54%	32%	-22

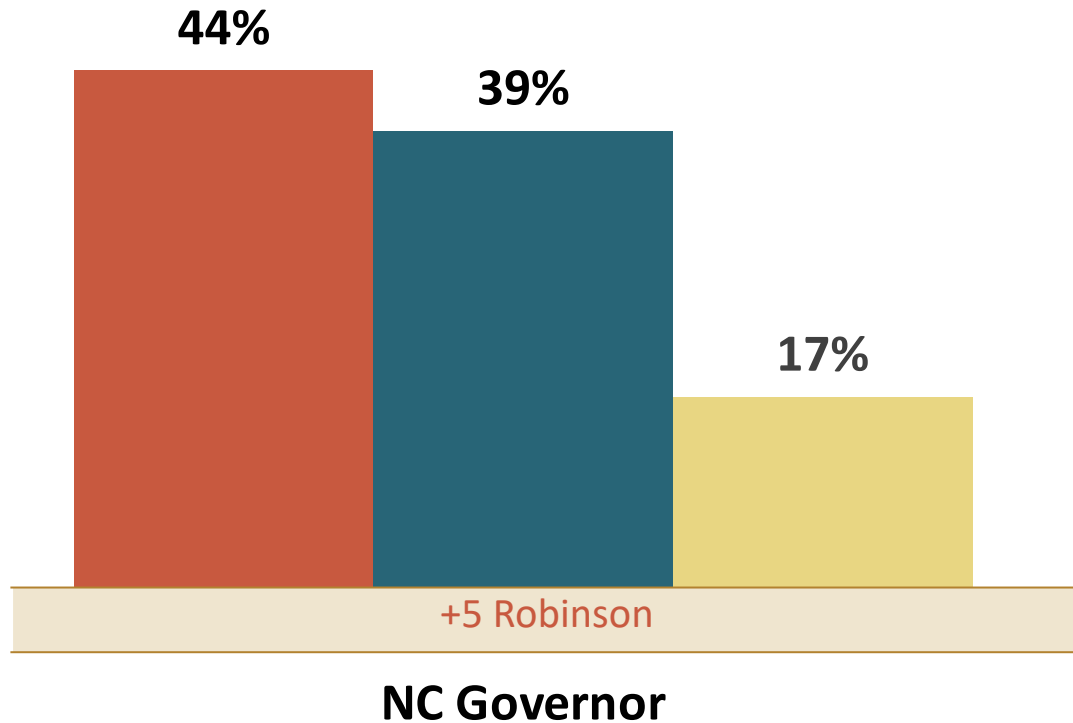
DeSantis also does better with White women and higher educated White men.

2024 Republican Presidential Primary Ballot by Key Groups

	Trump	Biden	Net Biden	DeSantis	Biden	Net Biden
White Men Ages 18–54	56%	39%	-17	60%	37%	-23
White Men Ages 55+	64%	28%	-36	67%	27%	-40
White Women Ages 18–54	47%	44%	-3	49%	32%	-17
White Women Ages 55+	53%	33%	-20	58%	32%	-26
White Men Non-College	72%	24%	-48	73%	24%	-49
White Men College+	44%	46%	+2	51%	44%	-7
White Women Non-College	58%	29%	-29	60%	20%	-40
White Women College+	37%	52%	+15	44%	49%	+5
African Americans	8%	85%	+77	6%	83%	+77

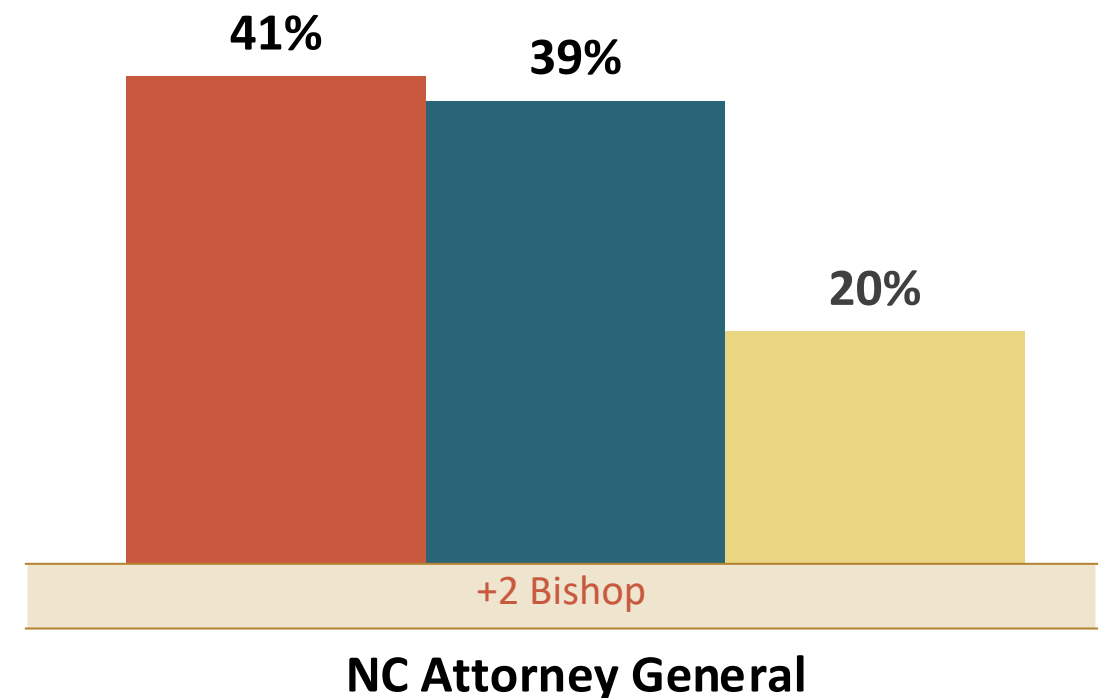
Both potential 2024 statewide ballots foreshadow tight races, with Robinson and Bishop holding slim early leads.

“If the 2024 election for North Carolina Governor were being held today, for whom would you vote between...”



■ Mark Robinson ■ Josh Stein ■ Undecided

“If the 2024 election for North Carolina Attorney General were being held today, for whom would you vote between...”

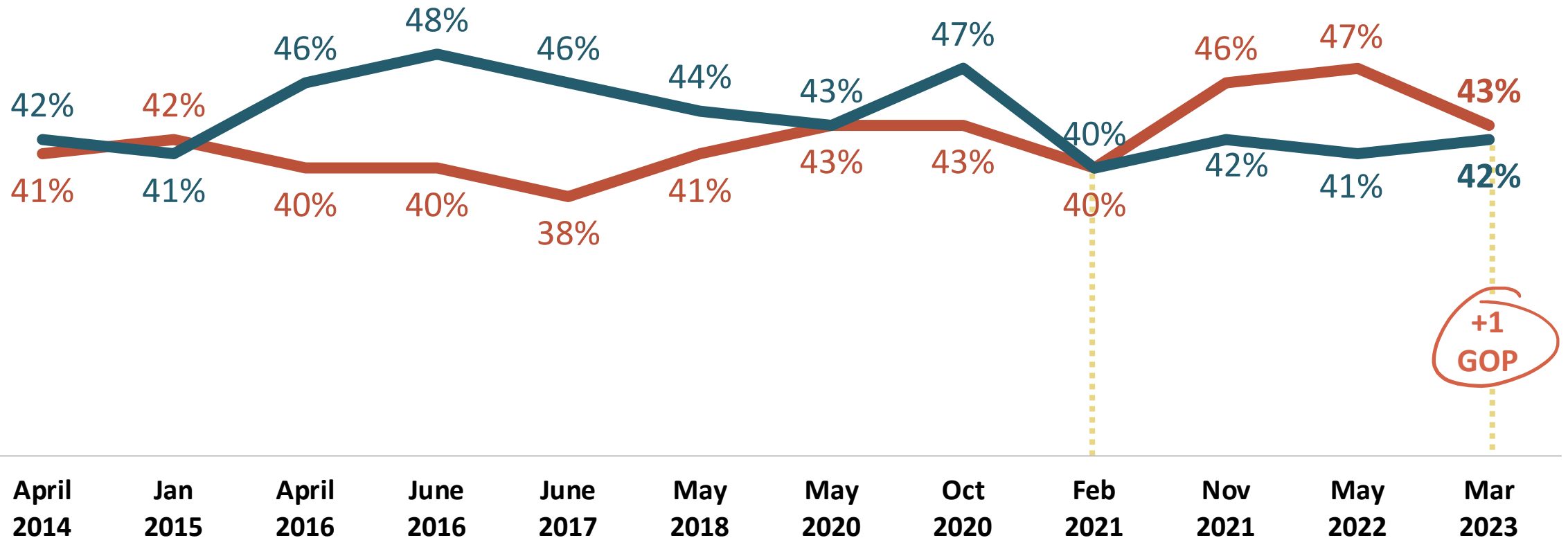


■ Dan Bishop ■ Jeff Jackson ■ Undecided

The generic General Assembly ballot is back to parity, similar to where we were two years ago this time.

Generic State Legislature Ballot

— Republican Candidate — Democrat Candidate



The drop in Republican ballot share on the generic ballot since May comes largely from Unaffiliated voters and younger White men.

Change In Generic Ballot

May 2022

March 2023

	GOP	DEM	NET GOP	GOP	DEM	Net GOP
Republicans	91%	3%	+88	90%	1%	+89
Unaffiliateds	44%	33%	+11	38%	38%	0
Democrats	11%	84%	-73	4%	87%	-83
African Americans	11%	80%	-69	6%	81%	-75
White Men Ages 18-54	63%	26%	+37	53%	36%	+17
White Men Ages 55+	62%	26%	+46	68%	27%	+41
White Women Ages 18-54	47%	41%	+6	45%	35%	+10
White Women Ages 55+	56%	32%	+24	57%	30%	+27
White Evangelicals	70%	15%	+55	76%	15%	+61



THE BOTTOM LINE



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1

Voters continue to want the General Assembly to focus on economic issues, but we have seen a rise in concern about crime/public safety and education. Abortion has noticeably declined since November 2022.

2

There are a number of General Assembly proposals that garner considerable voter support. Voters give strong support to a host of proposals: requiring lifetime GPS tracking for convicted repeat sex offenders, eliminating the sales tax on groceries and food, legalizing medical marijuana, increasing the child tax credit, expanding the Opportunity Scholarship program, and prohibiting biological males from competing in girls' sports.

3

The Parents' Bill of Rights and Medicaid Expansion are extremely popular, with solid bipartisan support.

4

There are several proposed Constitutional amendments that are extremely popular with voters. Voter ID and reducing the income tax cap are supported by about two-thirds of registered voters. Term limits for Supreme Court Justices and electing Board of Education members are supported by about three-quarters of voters. Voters are split about repealing the literacy test.

THE BOTTOM LINE

5

We have seen a significant shift in attitudes toward abortion. A solid majority of voters (57%) would support a bill to prohibit abortions after the first trimester except in cases of rape, incest, or where the life of the mother is in danger. OTC birth control and an adoption tax credit also receive solid support from voters.

6

Roy Cooper continues to be the most well-known Council of State elected official, but not necessarily the most favorable. And, with an eye towards 2024, Republicans and DeSantis have a slight edge over potential Democratic opponents as of today.



M E E T N G

S R E E T