CYGNAL

Survey of Likely Republican Primary Election Voters

North Carolina Statewide

Conducted October 8 – 9, 2023

n=600 | ±3.88%

1. How do you plan to vote in the 2024 Republican primary election for President?

	Freq.	%
Vote in-person on Election Day	**294**	**48.9%**
Definitely vote in-person on Election Day	226	37.6%
Probably vote in-person on Election Day	68	11.3%
Vote absentee by mail	**20**	**3.4%**
Definitely vote absentee by mail	13	2.2%
Probably vote absentee by mail	7	1.2%
Vote early in-person	**286**	**47.7%**
Definitely vote early in-person	157	26.2%
Probably vote early in-person	129	21.5%
Total	600	100.0%

2 – 6. For each of the following, please indicate if you have heard of the person, and if you have, whether you have a favorable or unfavorable opinion of them. If you haven't heard of a name, choose so.

	Fav	Very Fav	Unfav	Very Unfav	No opinion	NHO	NET Fav
Phil Berger	**21.5%** **129**	6.3% 38	**13.8%** **83**	6.0% 36	23.9% 144	40.8% 245	7.7%
Tim Moore	**20.2%** **121**	5.9% 35	**8.7%** **52**	5.1% 30	25.6% 154	45.4% 273	11.6%
Thom Tillis	**43.3%** **260**	12.8% 77	**33.3%** **200**	15.0% 90	18.0% 108	5.5% 33	10.0%
Ted Budd	**48.2%** **289**	21.3% 128	**19.2%** **115**	9.6% 58	23.6% 141	9.0% 54	29.0%
Patrick McHenry	**31.1%** **187**	13.3% 80	**10.3%** **62**	4.5% 27	23.4% 141	35.2% 211	20.8%

Thinking about the 2024 Republican Presidential primary election…

7. If the 2024 Republican Presidential primary was held today, who would you vote for out of the following options?

	Freq.	%
Donald Trump	311	51.8%
Vivek Ramaswamy	31	5.2%
Ron DeSantis	72	12.0%
Chris Christie	22	3.7%

	Freq.	%
Nikki Haley	63	10.4%
Mike Pence	17	2.9%
Tim Scott	12	2.0%
Asa Hutchinson	3	0.5%
Undecided	69	11.5%
Total	600	100.0%

Governor Primary Ballot

8. If the 2024 Republican primary election for Governor was held today, and you had to make a choice, who would you vote for out of the following options?

	Freq.	%
Mark Robinson	292	48.6%
Mark Walker	25	4.1%
Dale Folwell	29	4.9%
Andy Wells	4	0.7%
Jesse Thomas	3	0.5%
Undecided	247	41.2%
Total	600	100.0%

Lt. Governor Primary Ballot

9. If the 2024 Republican primary election for Lieutenant Governor was held today, and you had to make a choice, who would you vote for out of the following options?

	Freq.	%
Deanna Ballard	19	3.1%
Peter Boykin	9	1.4%
Rivera Douthit	1	0.2%
Jeffrey Elmore	5	0.8%
Allen Mashburn	7	1.2%
Sam Page	24	4.0%
Hal Weatherman	23	3.8%
Seth Woodall	12	1.9%
Undecided	502	83.6%
Total	600	100.0%

Labor Commissioner Primary Ballot

10. If the 2024 Republican primary election for North Carolina Labor Commissioner was held today, and you had to make a choice, who would you vote for out of the following options?

	Freq.	%
Luke Farley	16	2.7%
Jon Hardister	32	5.3%
Travis Wilson	20	3.3%
Undecided	532	88.6%
Total	600	100.0%

11. Which one of the following TWO issues are the most important to you in the Republican primary election for Governor?

	Freq.	%
Budget and taxes	250	41.6%
Immigration	229	38.2%
The size and scope of government	165	27.6%
Education	149	24.8%
Abortion	95	15.8%
Public Safety	85	14.2%
Healthcare	79	13.1%
Energy	44	7.3%
Environment	25	4.2%
Unsure	15	2.5%
Transportation	12	1.9%
Total	600	100.0%

Turning now to healthcare in North Carolina…

Certificate of Need Familiarity
12. Are you familiar with the Certificate of Need (CON) regulation in North Carolina, which requires healthcare providers to prove the necessity of new facilities or services before they can expand or open new locations?

	Freq.	%
Yes	176	29.3%
No	356	59.3%
Unsure	68	11.4%
Total	600	100.0%

Certificate of Need Limit Healthcare Spending
13. Do you agree or disagree that the CON regulation effectively limits healthcare spending by discouraging unnecessary medical equipment acquisitions?

	Freq.	%
Agree	**176**	**29.3%**
Strongly agree	56	9.4%
Somewhat agree	120	19.9%
Disagree	**146**	**24.3%**
Somewhat disagree	84	13.9%
Strongly disagree	62	10.3%
Unsure	278	46.4%
Total	600	100.0%

14. In your opinion, has the CON regulation in North Carolina helped or hindered access to healthcare services in your community?

	Freq.	%
Helped	**49**	**8.1%**
Definitely helped	14	2.3%
Somewhat helped	35	5.8%
Neither helped nor hindered	**76**	**12.6%**
Hindered	**148**	**24.6%**
Somewhat hindered	91	15.1%
Definitely hindered	57	9.5%
Unsure	328	54.7%
Total	600	100.0%

15. Should North Carolina lawmakers consider reforming or eliminating the CON regulation?

	Freq.	%
Yes	**215**	**35.8%**
Yes, they should reform the CON regulation	138	22.9%
Yes, they should eliminate the CON regulation entirely	77	12.9%
No, keep the CON regulation as is	**53**	**8.8%**
Unsure	332	55.4%
Total	600	100.0%

Thinking now about the state legislature….

16. Are you aware that 39 states, like Florida, have strict limits on the length of their legislative sessions, while the other 11 states, like North Carolina, do not impose any specific limits on session length?

	Freq.	%
Yes, I was already aware	182	30.3%
No, I was not previously aware	382	63.7%
Unsure	36	6.1%
Total	600	100.0%

17. Would you support or oppose a specific limit, either in terms of days or dates, on the length of the regular legislative session in North Carolina?

	Freq.	%
Support	**308**	**51.3%**
Strongly support	181	30.2%
Somewhat support	126	21.0%
Neither support nor oppose	**110**	**18.4%**
Oppose	**88**	**14.7%**
Somewhat oppose	46	7.7%
Strongly oppose	42	7.0%
Unsure	94	15.6%
Total	600	100.0%

Session Limit Opinion

18. Which of the following statements best reflects your opinion on legislative session limits in North Carolina?

	Freq.	%
North Carolina should set strict day limits to ensure efficient lawmaking	162	27.0%
North Carolina should set specific date limits to provide clarity on session timelines	187	31.2%
North Carolina should continue without any specific session limits	105	17.5%
Unsure	146	24.3%
Total	600	100.0%

Term Limits S/O

19. Would you support or oppose term limits for the leaders of the North Carolina General Assembly, including the Speaker of the House of Representatives and the President Pro Tempore of the state Senate?

	Freq.	%
Support	**513**	**85.5%**
Strongly support	385	64.1%
Somewhat support	129	21.4%
Neither support nor oppose	**26**	**4.4%**
Oppose	**26**	**4.3%**
Somewhat oppose	15	2.5%
Strongly oppose	11	1.8%
Unsure	35	5.8%
Total	600	100.0%

Term Limits Length

20. How many terms do you think should be the maximum limit for the Speaker of the House of Representatives in the state House and the President Pro Tempore of the state Senate?

	Freq.	%
No term limits	24	4.1%
One term (two years)	36	6.0%
Two terms (four years)	263	43.8%
Three terms (six years)	130	21.7%
Four terms (eight years)	110	18.4%
Unsure	36	6.0%
Total	600	100.0%

21. Are you female or male?

	Freq.	%
Female	294	49.0%
Male	306	51.0%
Total	600	100.0%

22. What age range do you fall within?

	Freq.	%
Under 50	**167**	**27.9%**
18 - 34	68	11.4%
35 - 49	99	16.5%
50 and Over	**433**	**72.1%**
50 - 64	190	31.7%
65 or older	242	40.4%
Total	600	100.0%

23. And thinking about your views toward politics and government, would you say you are…

	Freq.	%
Conservative	**502**	**83.7%**
Extremely conservative	91	15.1%
Very conservative	228	38.0%
Somewhat conservative	183	30.6%
Moderate	**80**	**13.4%**
Liberal	**5**	**0.8%**
Unsure	13	2.1%
Total	600	100.0%

24. If you had to choose, do you consider yourself more of a Trump Republican or more of a traditional conservative Republican?

	Freq.	%
More a Trump Republican	**282**	**47.0%**
Much more a Trump Republican	162	27.0%
Somewhat more a Trump Republican	120	20.0%
Traditional conservative Republican	**280**	**46.6%**
Somewhat more a traditional conservative Republican	149	24.8%
Much more a traditional conservative Republican	131	21.9%
Unsure	38	6.4%
Total	600	100.0%

25. Do you consider the area where you live to be more rural, suburban, or urban?

	Freq.	%
Rural	295	49.2%
Suburban	248	41.4%
Urban	57	9.4%
Total	600	100.0%

26. What annual household income range do you fall within out of the following options?

	Freq.	%
Less than $40,000	77	12.8%
$40,000 - $69,999	106	17.7%
$70,000 - $99,999	135	22.5%
$100,000?or more	213	35.4%
Unsure	70	11.6%
Total	600	100.0%

27. Which of the following best describes your race or ethnicity?

	Freq.	%
White or Caucasian	527	87.8%
Asian or Pacific Islander	9	1.5%
Black or African American	11	1.9%
Hispanic or Latino	12	2.0%
Other	24	3.9%
Unsure	17	2.9%
Total	600	100.0%

28. Thinking back, who did you vote for in the 2020 election for President?

	Freq.	%
Republican Donald Trump	502	83.6%
Democrat Joe Biden	60	10.1%

	Freq.	%
Another candidate	23	3.8%
Did not vote	6	0.9%
Unsure	9	1.6%
Total	600	100.0%

29. What's the highest level of education you have completed?

	Freq.	%
No degree	**301**	**50.2%**
Some high school	6	1.1%
High school diploma/GED	61	10.2%
Technical Certification	25	4.2%
Some college or Associate's Degree	208	34.7%
At least College	**294**	**49.0%**
Four-year undergraduate or Bachelor's Degree	158	26.3%
Graduate degree or further	136	22.7%
Unsure	5	0.8%
Total	600	100.0%

30. Primary Election X of 4

	Freq.	%
0 of 4	10	1.6%
1 of 4	179	29.9%
2 of 4	153	25.6%
3 of 4	147	24.5%
4 of 4	110	18.4%
Total	600	100.0%

31. Geo – Congressional District

	Freq.	%
1	38	6.3%
2	18	3.1%
3	53	8.9%
4	30	5.0%
5	51	8.6%
6	47	7.8%
7	42	7.1%
8	38	6.3%
9	47	7.8%
10	77	12.8%
11	64	10.6%
12	17	2.9%
13	44	7.4%
14	33	5.4%
Total	600	100.0%

32. Geo - DMA

	Freq.	%
Charlotte/West	**236**	**39.4%**
Charlotte	168	27.9%
Greenvll-Spart-Ashevll-And	65	10.9%
Chattanooga	3	0.6%
Central	**121**	**20.2%**
Greensboro-H.Point-W.Salem	118	19.6%
Myrtle Beach-Florence	3	0.5%
Raleigh-Durham (Fayetvlle)	**148**	**24.7%**
Coastal	**95**	**15.8%**
Greenville-N.Bern-Washngtn	49	8.2%
Wilmington	35	5.9%
Norfolk-Portsmth-Newpt Nws	11	1.8%
Total	600	100.0%

33. Age + Income

	Freq.	%
<65 <$40k	41	6.8%
<65 $70k-$100k	74	12.3%
<65 $40k-$70k	58	9.7%
<65 $100k+	154	25.7%
65+ <$40k	36	6.0%
65+ $70k-$100k	61	10.2%
65+ $40k-$70k	48	8.0%
65+ $100k+	59	9.8%
Unsure	70	11.6%
Total	600	100.0%

34. Age + Gender

	Freq.	%
F 18 - 34	27	4.5%
F 35 - 49	50	8.3%
F 50 - 64	93	15.6%
F 65+	124	20.6%
M 18 - 34	41	6.9%
M 35 - 49	49	8.2%
M 50 - 64	97	16.1%
M 65+	119	19.8%
Total	600	100.0%

35. Race + Gender

	Freq.	%
White Female	261	43.4%
White Male	266	44.4%
Asian Female	5	0.9%
Asian Male	4	0.6%
Black Female	3	0.5%
Black Male	8	1.4%
Hispanic Female	6	1.0%
Hispanic Male	6	1.0%
Other Female	8	1.4%
Other Male	15	2.5%
Unsure	17	2.9%
Total	600	100.0%

36. Education + Gender

	Freq.	%
Female At least College	149	24.9%
Female No degree	142	23.6%
Male At least College	144	24.1%
Male No degree	160	26.6%
Unsure	5	0.8%
Total	600	100.0%

37. Party from File

	Freq.	%
Republican	405	67.6%
Democratic	9	1.5%
Other	185	30.9%
Total	600	100.0%

METHODOLOGY

This probabilistic survey was conducted October 8 – 9, 2023, with 600 likely Republican primary election voters. It has a margin of error of ±3.88%. Known registered voters were interviewed via live calls and SMS. This survey was weighted to a likely Republican primary election voter universe.

ABOUT THE FIRM

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