

# TARIFF SURVEY NORTH CAROLINA

APRIL 2025

Conducted by:

 **MORNING CONSULT**

**TARIFFS  
CO\$T  
U.S.** 

# METHODOLOGY

The survey was conducted March 22nd – 27th among a sample of 501 registered voters in North Carolina. The interviews were conducted online, and the data were weighted by state to approximate a target sample of registered voters based on age, gender, race, educational attainment, region, marital status, children in household, home ownership, gender by age, and 2024 presidential vote. Results from the full survey have a margin of error of plus or minus 4 percentage points in North Carolina.

# KEY TAKEAWAYS

Voters are struggling to make ends meet, and they fear tariff price hikes. Nine-in-ten voters are concerned about inflation, and three-in-four voters say it feels like the overall cost of living is going up.

Unfortunately, more than two-in-three voters believe that tariffs will increase the price of items they regularly purchase. As a result, more than two-thirds are trying to spend less money, and around half are avoiding any major purchases altogether. Put head-to-head, more than three-in-five voters say policy-makers should focus on fighting inflation instead of using tariffs - including nearly three quarters of independents. Even among Republicans, nearly half say the priority should be fighting inflation.

# ECONOMIC BASELINE

# ECONOMIC BASELINE: NORTH CAROLINA

**RESULT:** Nine-in-ten voters are concerned about inflation, and majorities are very concerned - regardless of party.

How concerned are you about inflation?

TOTAL CONCERN	RVs	DEM	IND	GOP
(% Very concerned + Somewhat concerned)	90%	93%	85%	91%

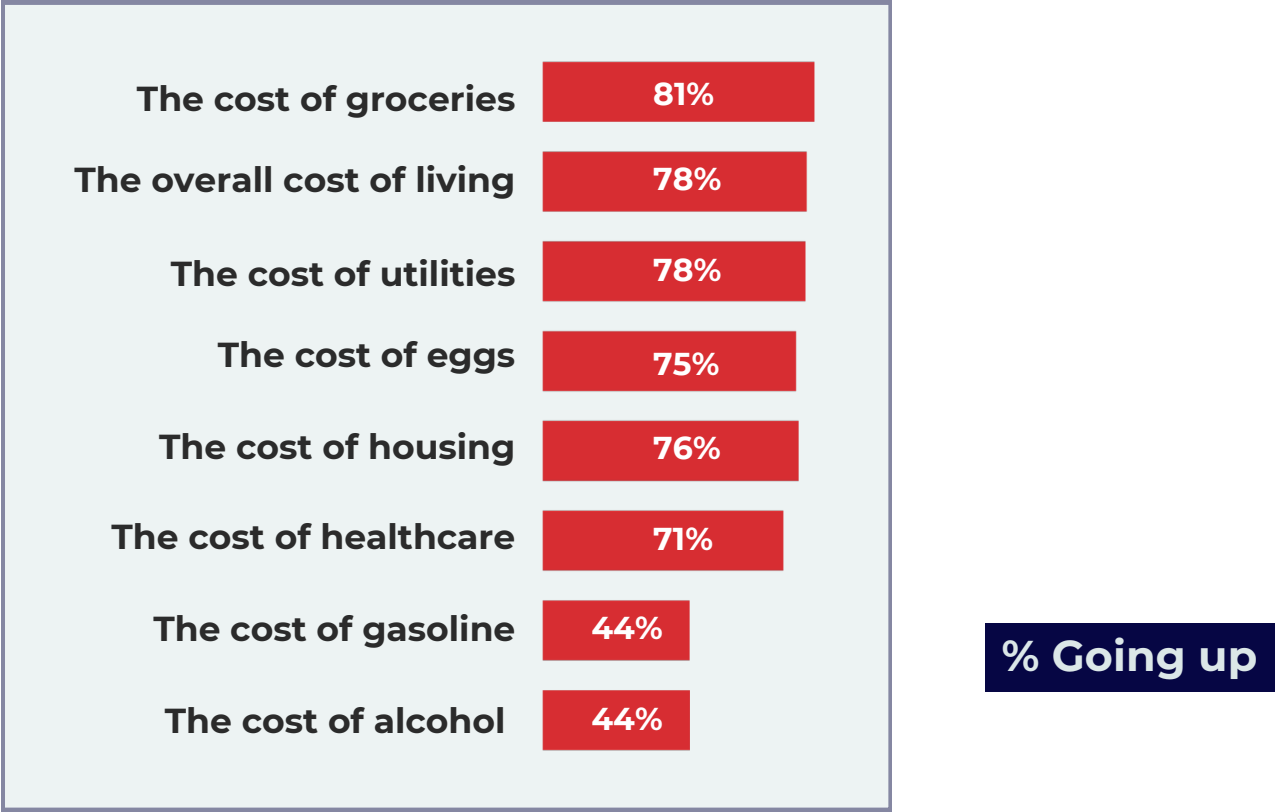
Very concerned   Somewhat concerned   Not too concerned   Not at all concerned   Don't know / No opinion



# ECONOMIC BASELINE: NORTH CAROLINA

**RESULT:** Three-in-four voters feel that the overall cost of living in their communities is increasing, along with groceries, utilities, eggs, housing, and healthcare.

Please indicate whether you feel like the following costs are going up, going down, or staying the same.

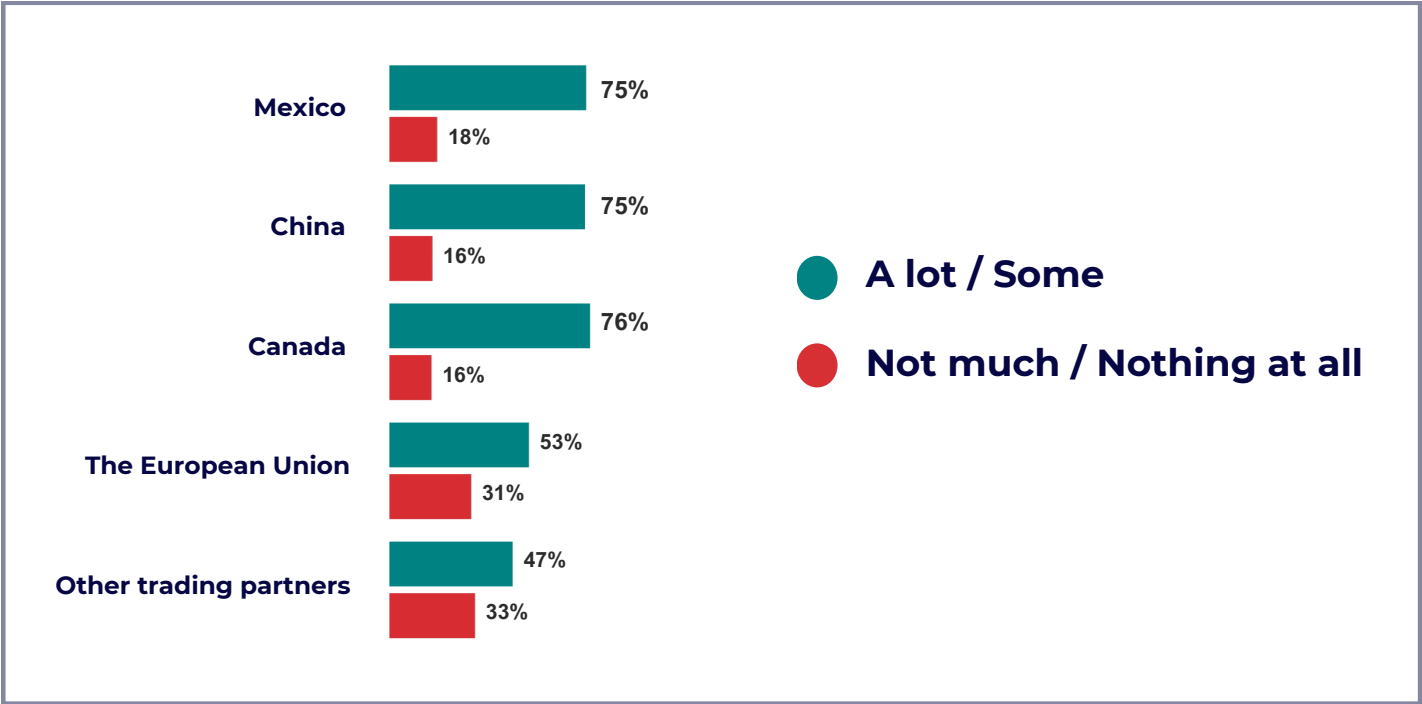


# TARIFF EXPECTATIONS

# TARIFF EXPECTATIONS: NORTH CAROLINA

**RESULT:** Voters are most familiar with tariffs on Mexico, China, and Canada. However, most have heard at least some about tariffs on the E.U. and other trading partners.

How much have you seen, heard, or read about tariffs being imposed on imports from the following regions?



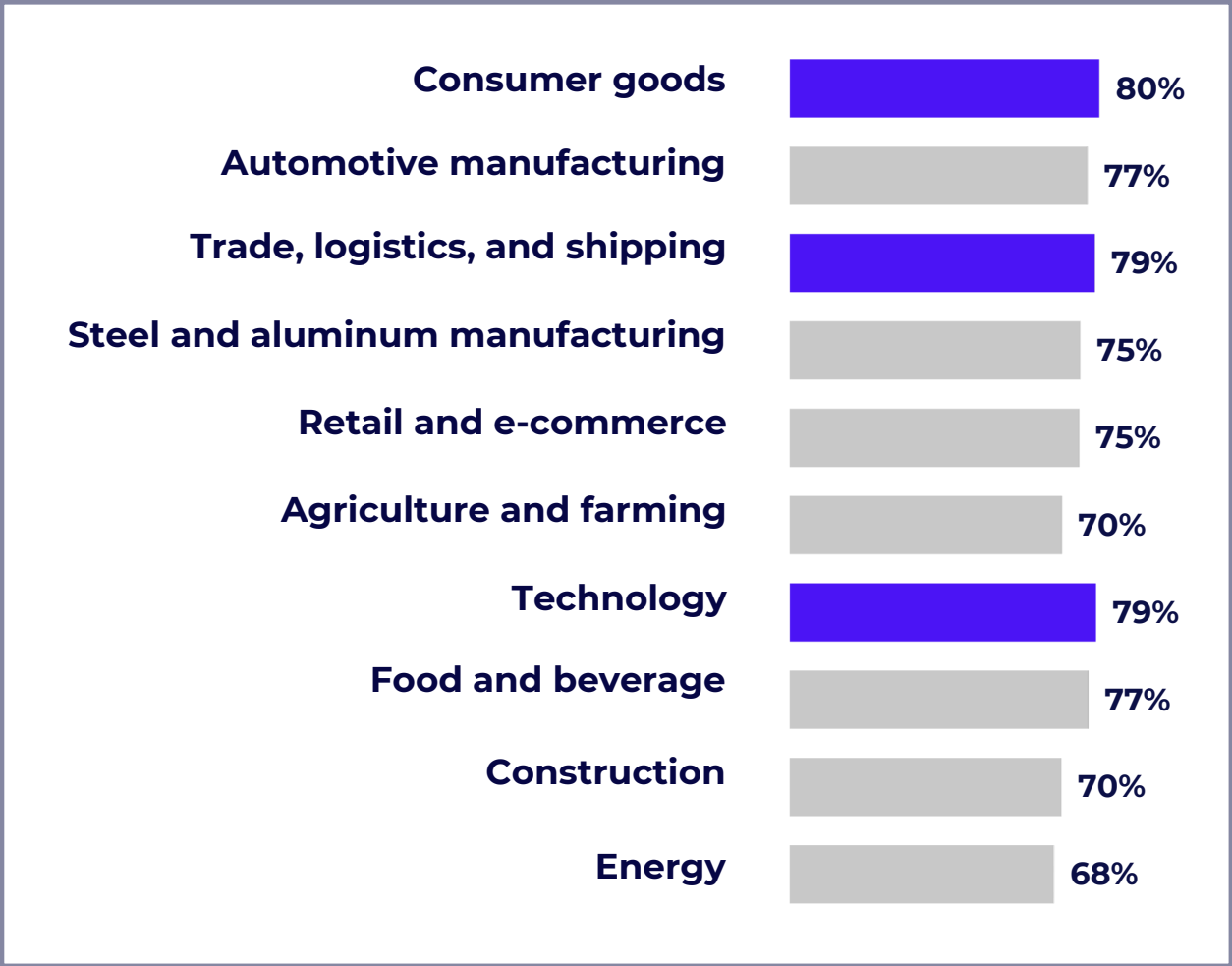


# TARIFF EXPECTATIONS: NORTH CAROLINA

How would you describe the impact, if any, that new tariffs will have on the following industries?



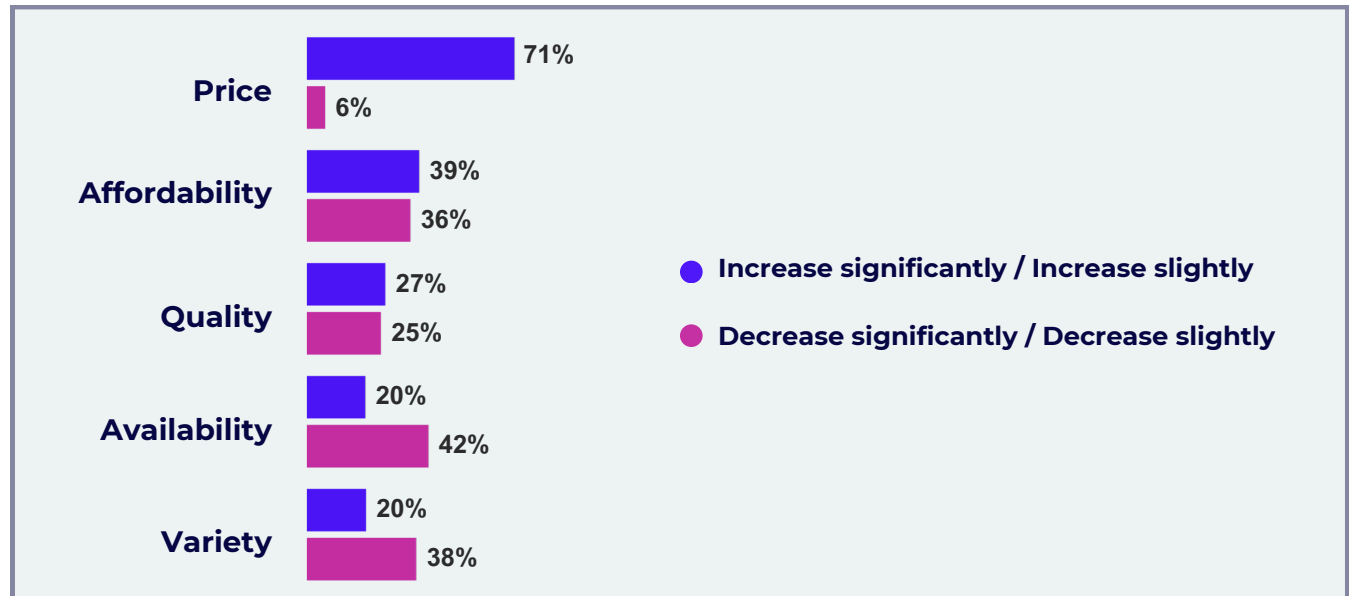
Top 3 Highlighted



# TARIFF EXPECTATIONS: NORTH CAROLINA

**RESULT:** More than two-thirds of voters expect the price of products they regularly purchase to increase as a result of tariffs, and pluralities expect declines in availability and variety.

Thinking about the products you regularly purchase, how might the following characteristics change in the future as a result of tariffs?



# TARIFF EXPECTATIONS: NORTH CAROLINA

**RESULT:** Voters are trying to spend less money and avoiding major purchases because of tariffs.

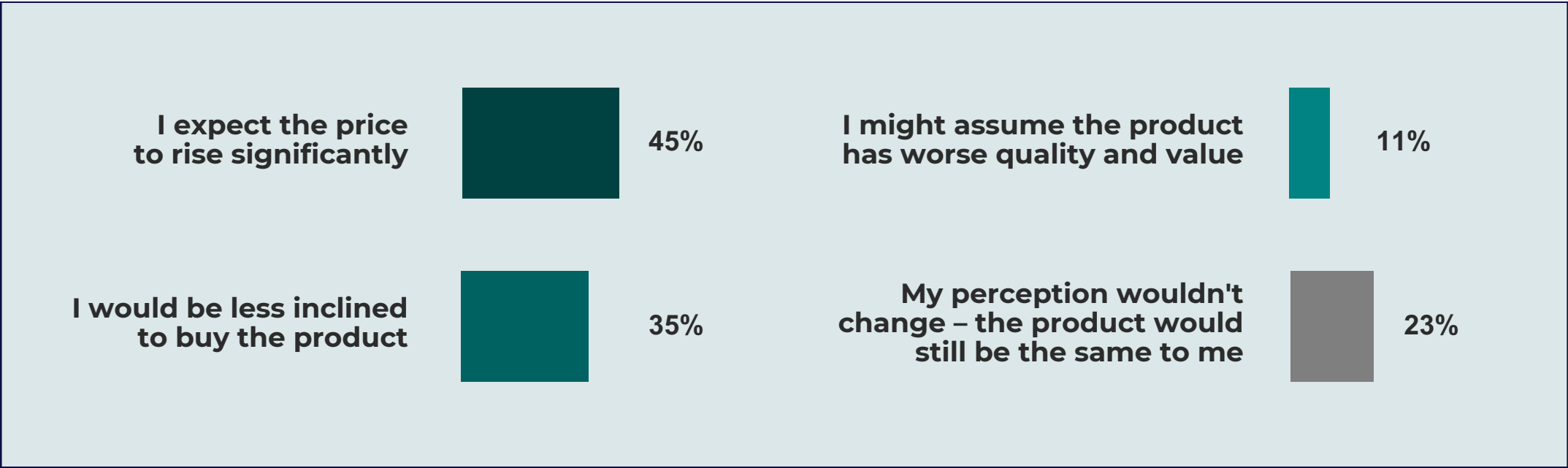
Are you currently doing any of the following because of tariffs?



# TARIFF EXPECTATIONS: NORTH CAROLINA

**RESULT:** Almost half of voters expect products subject to tariffs to rise in price significantly, and a third would be less inclined to buy a product subject to new tariffs altogether.

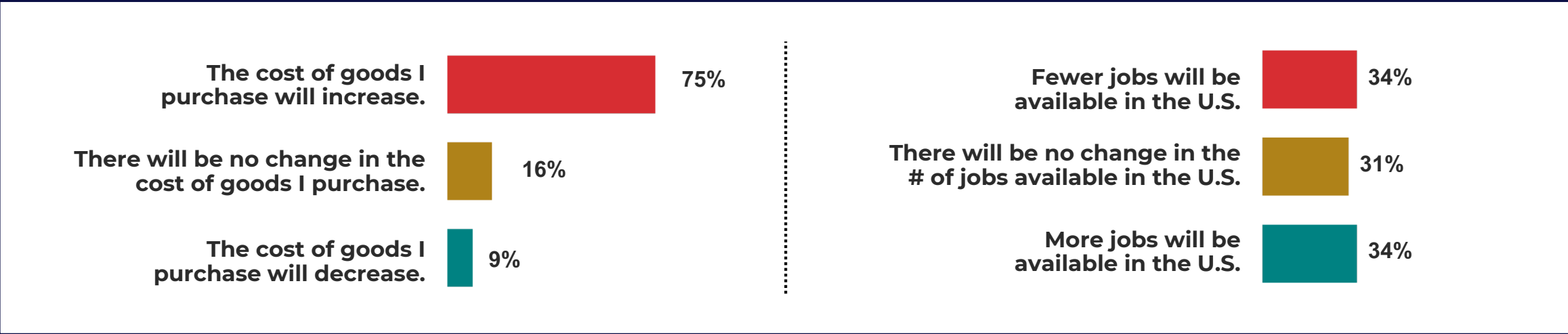
If a product you regularly purchase became subject to new tariffs, how might you respond? Please select all that apply.



# TARIFF EXPECTATIONS: NORTH CAROLINA

**RESULT:** Three-in-four voters expect tariffs will increase the cost of goods they purchase, and more than a third of voters think it's likely that tariffs will create additional jobs in the U.S.

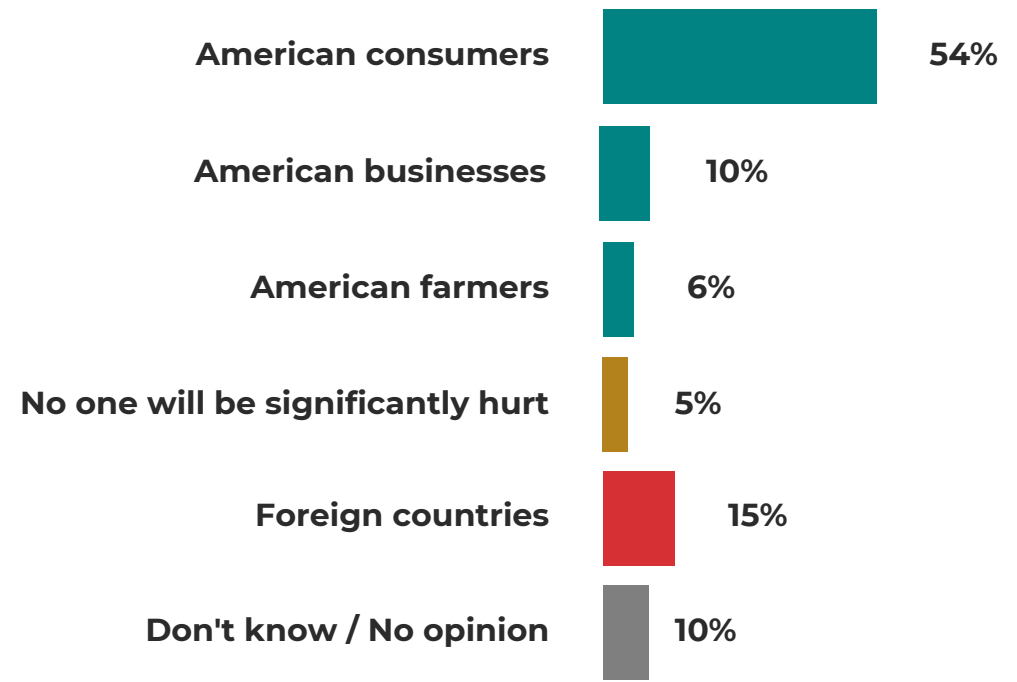
If new tariffs were implemented, which of the following outcomes do you think is most likely to happen to costs/jobs in the U.S.?



# TARIFF EXPECTATIONS: NORTH CAROLINA

**RESULT:** Voters expect American consumers to be hurt most by new tariffs and/or a resulting trade war. Fewer than one-in-five expect foreign countries to be hurt most.

**Who do you believe will be hurt most by imposing new tariffs and/or a resulting trade war?**

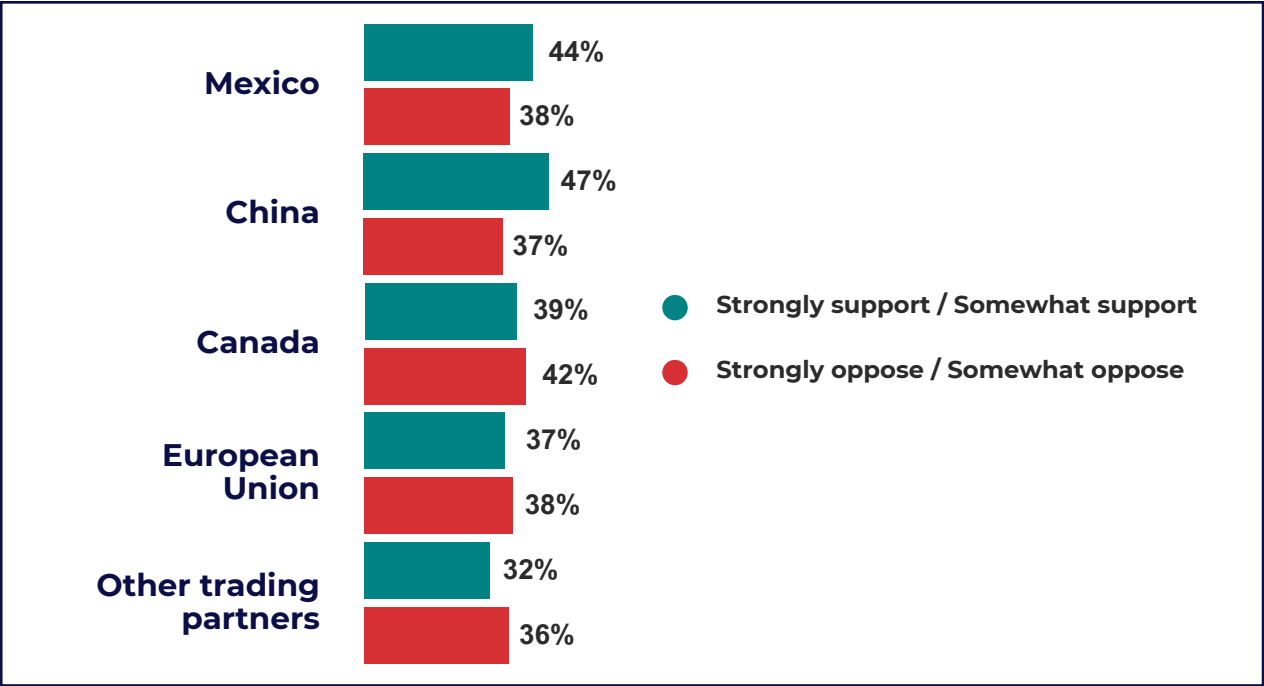


# POLITICAL IMPACT

# POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** Tariffs on China receive plurality support, but other target nations vary.

Do you support or oppose imposing tariffs on products imported from the following regions?





# POLITICAL IMPACT: NORTH CAROLINA

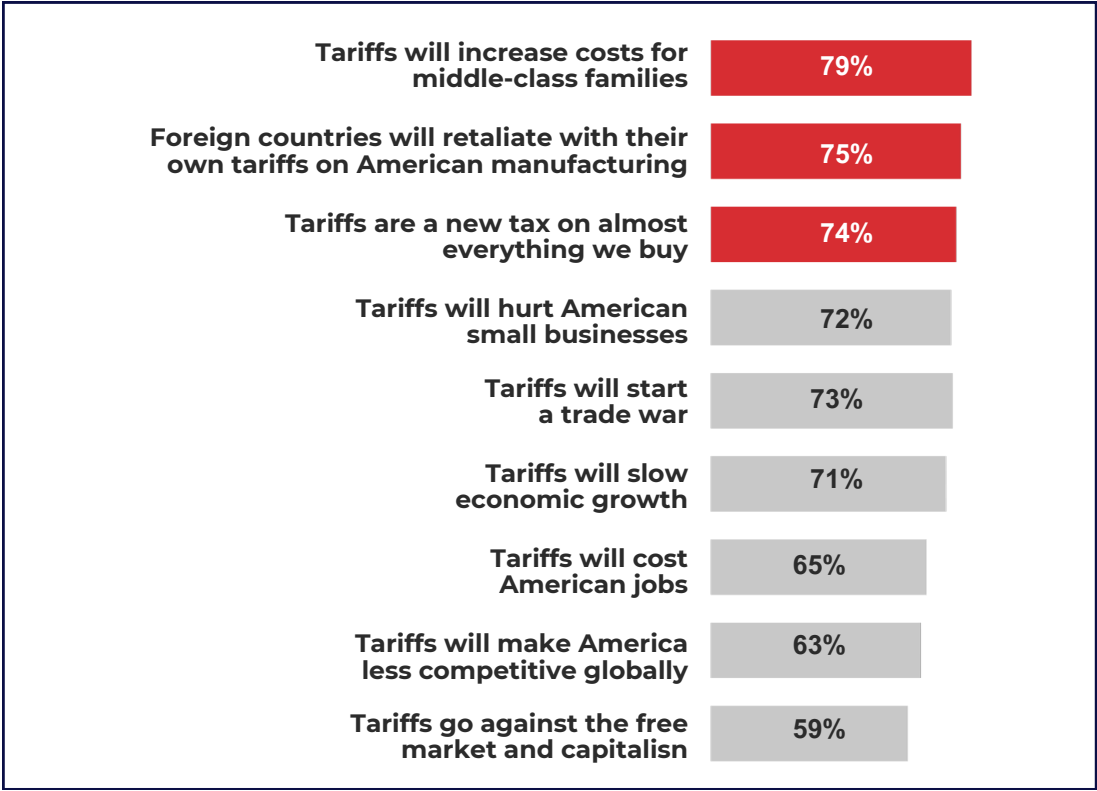
**RESULT:** Nearly three-in-four voters are concerned that tariffs will increase costs for middle-class families.

Please indicate how concerning each of the following statements about tariffs is.

% Very concerning +

% Somewhat concerning

Top 3  
Highlighted



# POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** Majorities of voters would be willing to accept higher prices to boost American manufacturing, driven by deep support among Republicans.

How willing, if at all, would you be to accept higher prices in exchange for strengthening American manufacturing?

TOTAL WILLING	RVs	DEM	IND	GOP
(% Very willing + Somewhat willing)	52%	31%	46%	74%

Very willing      Somewhat willing      Not too willing      Not willing at all



# POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** The immigration argument is less convincing—willingness is lower and a minority among Independents.

How willing, if at all, would you be to accept higher prices in exchange for giving the United States leverage on immigration?

TOTAL WILLING	RVs	DEM	IND	GOP
(% Very willing + Somewhat willing)	50%	30%	44%	70%

Very willing      Somewhat willing      Not too willing      Not willing at all



# POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** Only a minority of voters are willing to accept higher prices for a year or longer.

How long, if at all, would you be willing to accept higher prices to wait for the potential effects of tariffs?

WILLING TO WAIT A YEAR-PLUS	RVs	DEM	IND	GOP
(% Indefinitely + A few years + About a year)	32%	27%	28%	40%

● Indefinitely   ● A few years   ● About a year   ● A few months   ● I would not be willing to accept higher prices   ● Don't know / No opinion

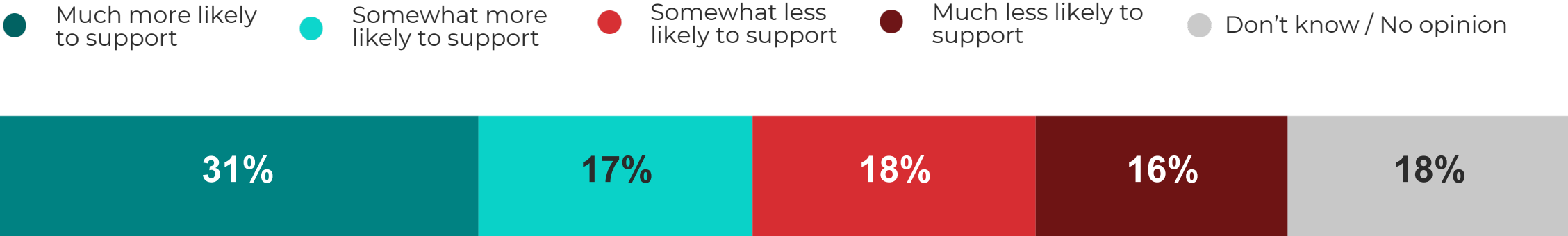


# POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** Nearly half of voters would be more likely to support an anti-tariff candidate, including around a third of Republicans.

Would you be more or less likely to support a member of Congress if they opposed new tariffs?

TOTAL MORE LIKELY	RVs	DEM	IND	GOP
(% Much more + Somewhat more likely)	48%	64%	52%	33%



# POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** Six in ten voters believe that policy-makers should focus on inflation instead of tariffs.

Which of the following best describes your perspective on tariffs, even if neither is exactly right?

Δ NET FOCUS ON INFLATION	DEM	IND	GOP
(% Fight inflation - % Use tariffs)	+57%	+46%	-4%

- Policy-makers should prioritize fighting inflation to lower the cost of goods.
- Policy-makers should prioritize using tariffs to strengthen American manufacturing and give the United States leverage on immigration.



## POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** Less than a quarter of voters across the board think that tariffs should be used as a long-term economic policy.

Which of the following best represents your perspective on the use of tariffs?

- Tariffs should be established as a long-term economic policy.
- Tariffs should be used as a short-term negotiating tool, but avoided in the long run.
- Tariffs should be avoided entirely and not used as a policy tool.
- Don't know / No opinion

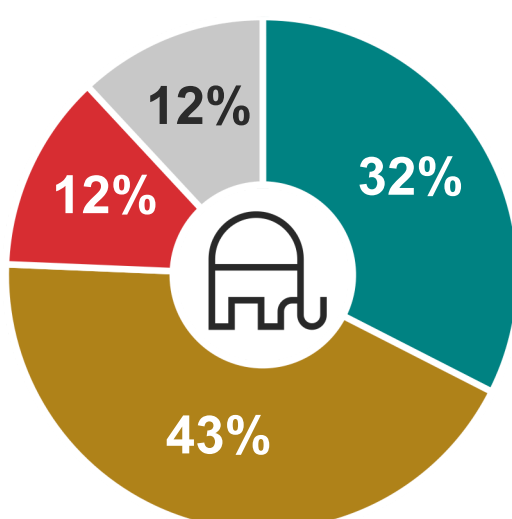
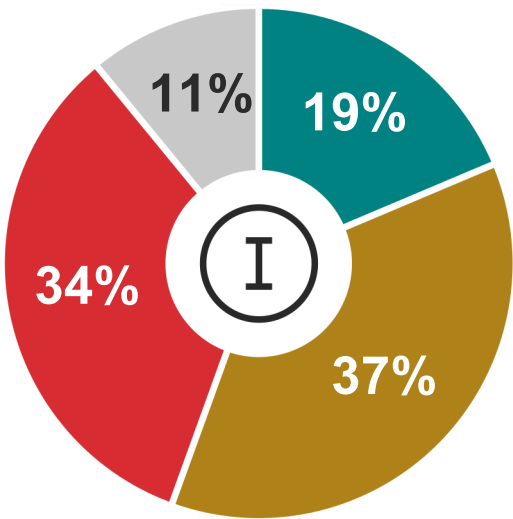
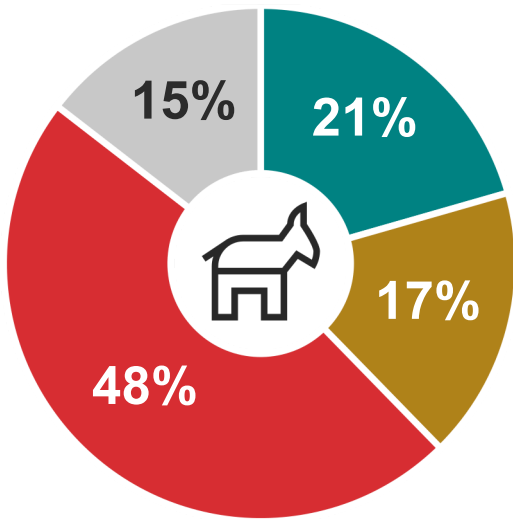


# POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** Just a third of Republicans believe tariffs should be established as a long-term economic policy.

Which of the following best represents your perspective on the use of tariffs?

- Tariffs should be established as a long-term economic policy.
- Tariffs should be used as a short-term negotiating tool, but avoided in the long run.
- Tariffs should be avoided entirely and not used as a policy tool.
- Don't know / No opinion





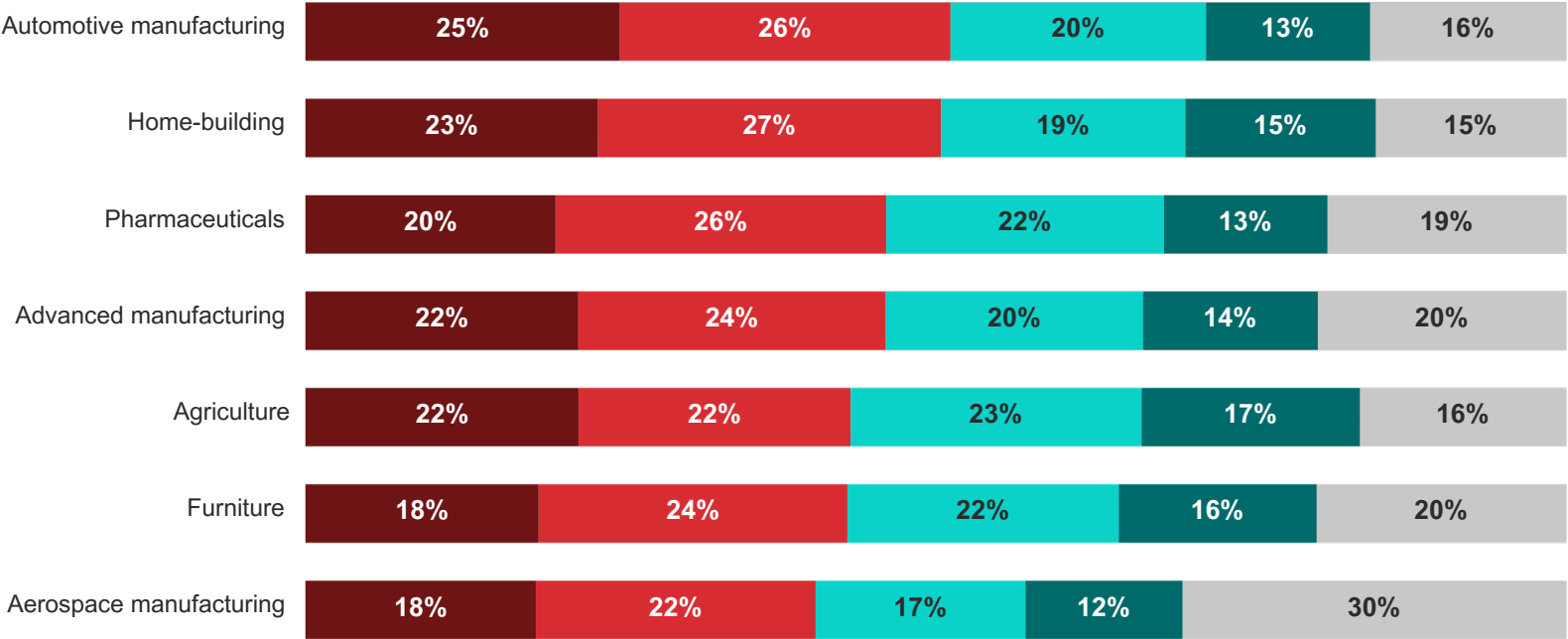
# STATE RESULTS

# POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** A majority of North Carolina voters believe that tariffs and/or a resulting trade war will negatively affect the local automotive manufacturing and homebuilding industries.

Please indicate whether you believe each of the following North Carolina industries will be positively or negatively affected by new tariffs and/or a resulting trade war.

Very negatively affected    Somewhat negatively affected    Somewhat positively affected    Very positively affected    Don't know / No opinion



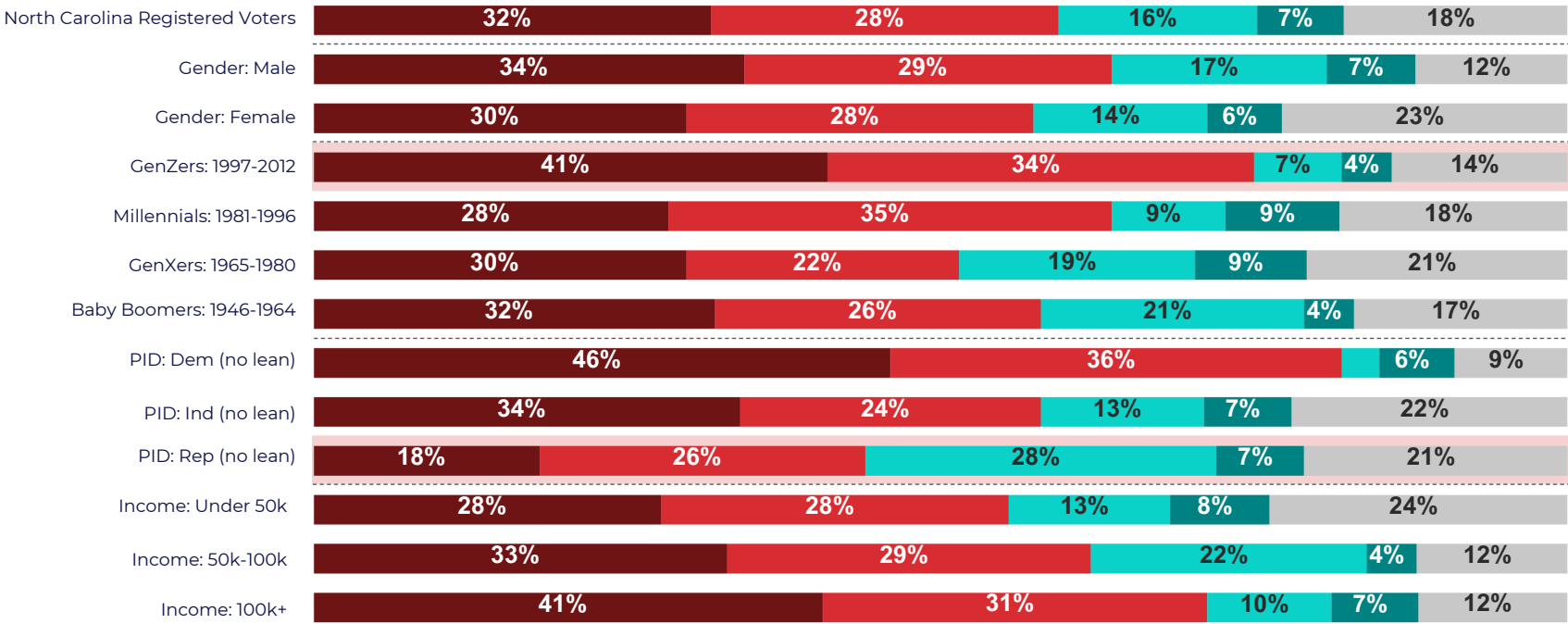
TOTAL NEGATIVE EFFECT	
(% Very negatively affected + Somewhat negatively affected)	
Automotive manufacturing	51%
Home-building	50%
Pharmaceuticals	46%
Advanced manufacturing	46%
Agriculture	43%
Furniture	43%
Aerospace manufacturing	40%

# POLITICAL IMPACT: NORTH CAROLINA

**RESULT:** Three-in-five North Carolina voters believe the Research Triangle will be hurt by tariffs and/or a trade war, including three quarters of Gen Z voters and a plurality of N.C. Republicans.

Please indicate if you agree or disagree with the following statement. *New tariffs and/or a resulting trade war will hurt communities home to biotech, pharmaceuticals, and high-tech innovation like the Research Triangle.*

Strongly agree    Somewhat agree    Somewhat disagree    Strongly disagree    Don't know / No opinion



TOTAL AGREE	
(% Strongly agree + % Somewhat agree)	
N.C. Registered Voters	60%
Gender: Male	63%
Gender: Female	58%
GenZers: 1997-2012	75%
Millennials: 1981-1996	64%
GenXers: 1965-1980	52%
Baby Boomers: 1946-1964	58%
PID: Dem (no lean)	82%
PID: Ind (no lean)	58%
PID: Rep (no lean)	44%
Income: Under 50k	55%
Income: 50k-100k	61%
Income: 100k+	72%