

Leadership 2028

An In-Depth Look at the Governing and Leadership Landscape

July 2026

Overview

Future Majority, with polling partner Change Research, fielded a statewide survey of Pennsylvania voters July 10-15, 2026 (n=1,074), alongside three Democratic primary-electorate surveys conducted statewide in Georgia (n=1,072), North Carolina (n=1,132), and Virginia* (n=1,084) from July 10-20, 2026.

These latest surveys build on our Leadership 2028 voter research program, which has surveyed more than 13,000 voters across nine states since October 2025. **Leadership 2028 voter research includes:**

- **Democratic primary voter surveys in anticipated key states:** Georgia, North Carolina, and Virginia (July 2026), New Hampshire and Michigan (April 2026), South Carolina and Nevada (January-February 2026)
- **General-election voter surveys** in Arizona (April 2026) and Pennsylvania (October 2025, January 2026, and July 2026)
- **Specialized sample of Black voters** across Georgia, Michigan, North Carolina, and South Carolina (October 2025)

What We're Seeing

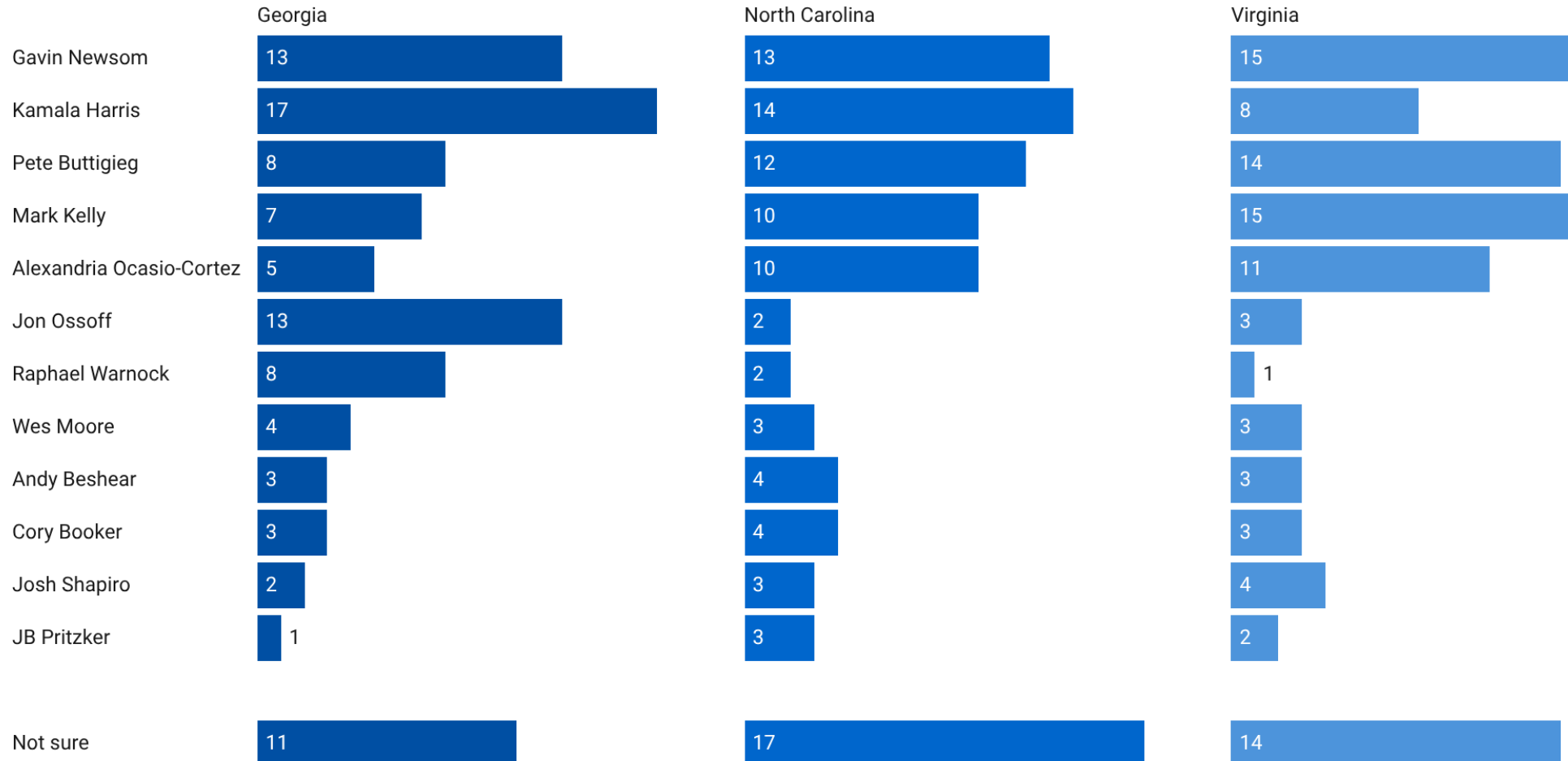
- **No one owns the potential field.** “Not sure” is the top or near-top answer in every state (11% in Georgia, 17% in North Carolina, 14% in Virginia) and no leader clears 17% anywhere. Each state’s potential field is dynamic.
- **Information reorders.** After voters hear bio, résumé and balanced criticisms, Mark Kelly gains in all three states, along with Andy Beshear who gains 2-5 points and Jon Ossoff who gains 3-4 points outside of Georgia. Kamala Harris falls 5 points in Georgia and 4 points in North Carolina.
- **Being well-known may be a ceiling, not a head start.** No leader familiar to more than 88% of primary voters gained more than a single point in any state after information.
- **Motivation is not a problem.** Already, 84-89% of Democratic primary voters say they are highly motivated to participate in the 2028 primary.
- **In Pennsylvania, the environment worsened and no Democrat gained.** 65% say their income is falling behind the cost of living, erasing January's improvement and returning to October 2025 levels. Undecided voters have increased since January, and only home-state governor Josh Shapiro leads both JD Vance and Marco Rubio.

The Democratic Primary Landscape is Wide Open

First Choice – GA/NC/VA

Among All Democratic Primary Voters

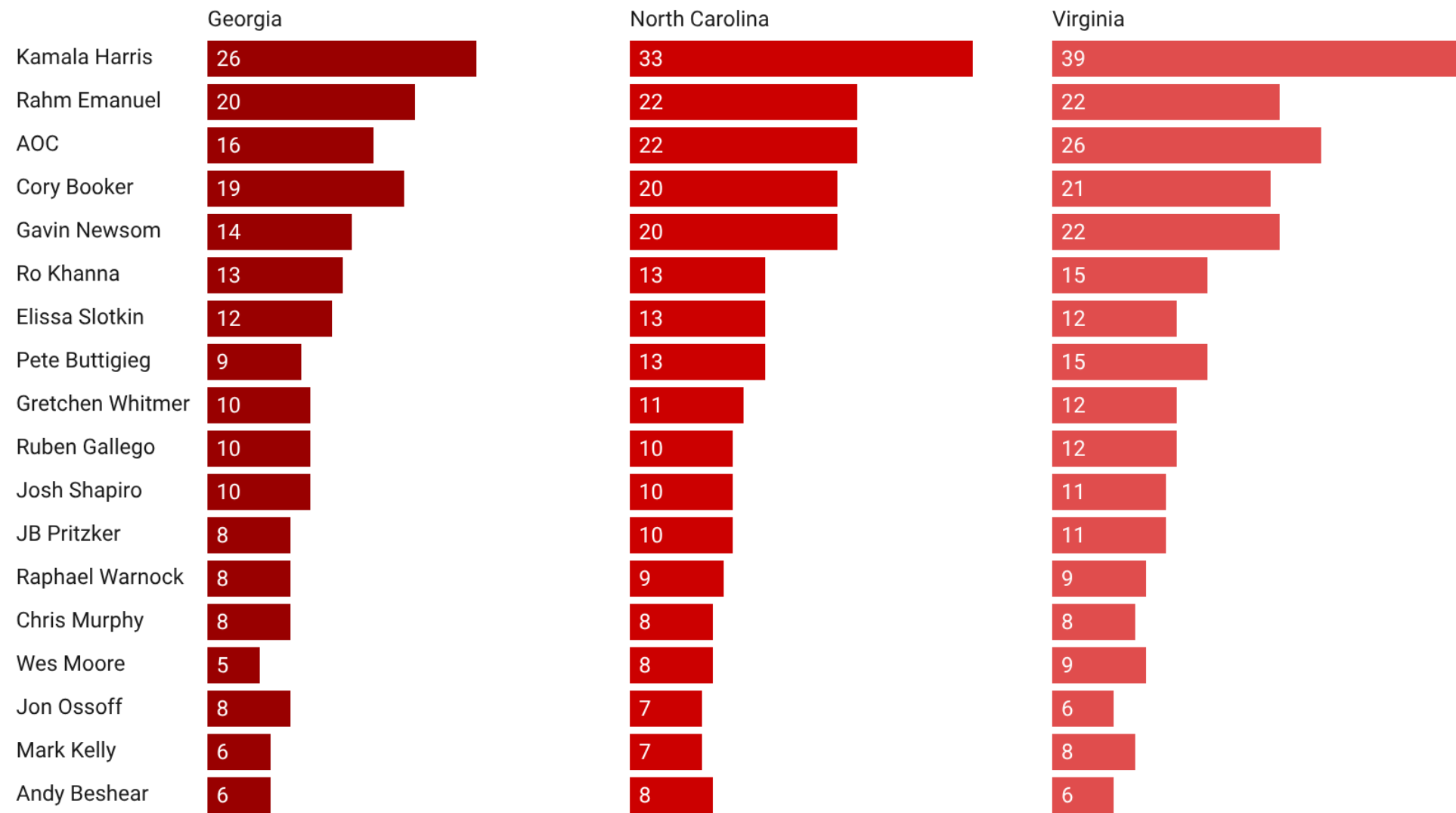
It is a long way off, but please look ahead to the next presidential election in 2028. If the candidates for the Democratic Primary are as follows, and you had to pick one person, who would you support today?



Disappointed if Chosen

Among All Democratic Primary Voters

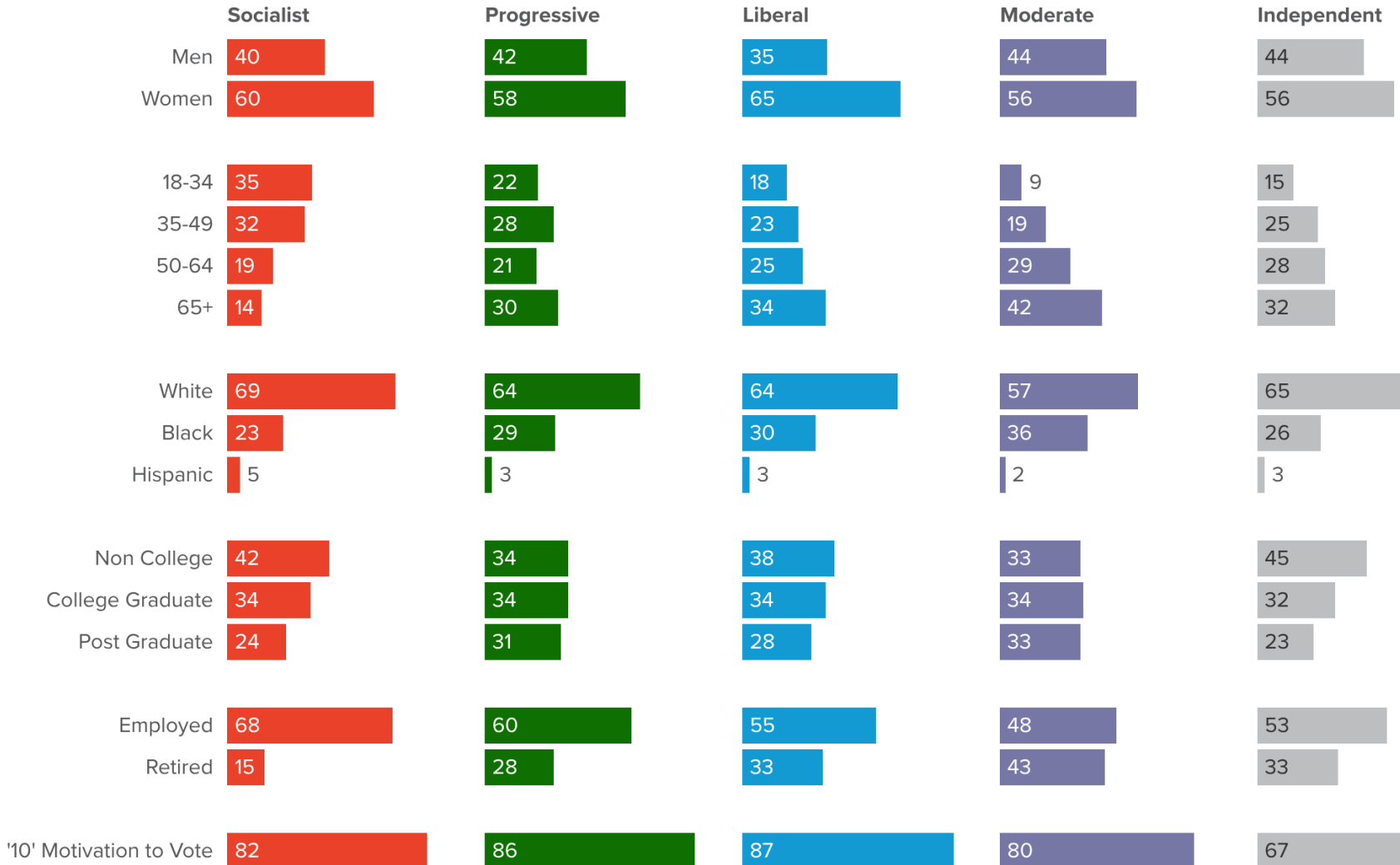
Which, if any, of the following would disappoint you if they were the Democratic nominee? Choose all that apply.



Who is the Democratic Primary Voter?

Among All Combined
Democratic Primary Voters

When considering politics and government, do you think of yourself as: (Choose all that apply)

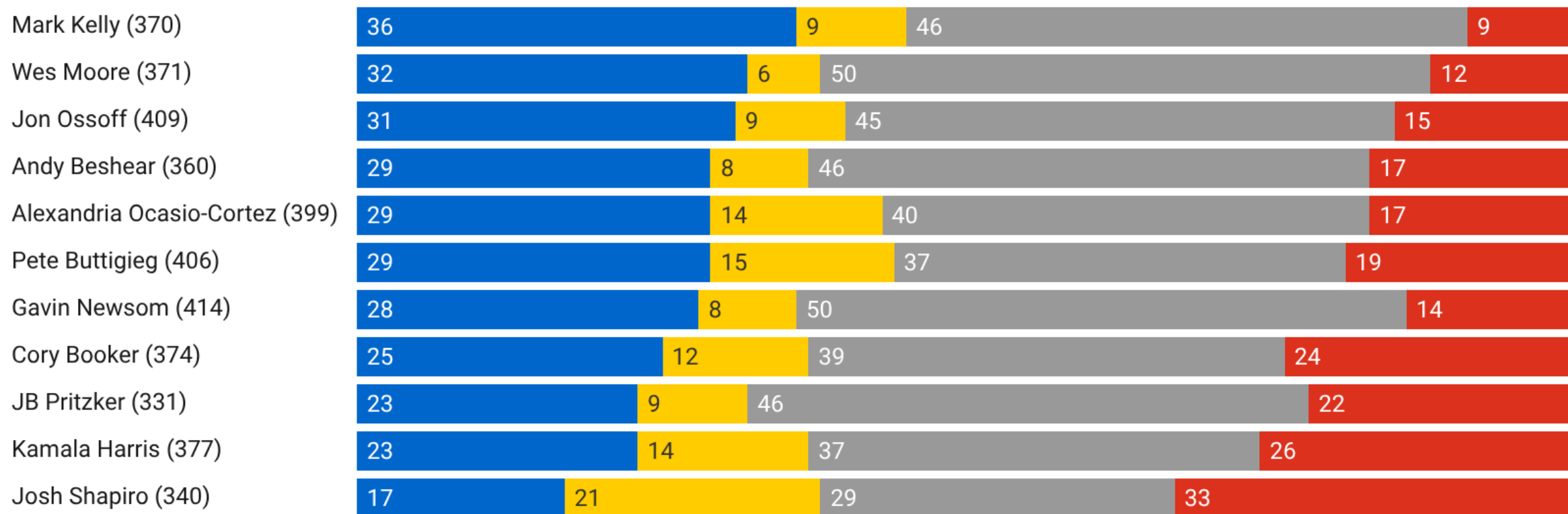


What Voters Say About Democrats

Among All Combined
Democratic Primary Voters

Directional sentiment of open-ended responses about each leader, as a share of that leader's substantive responses. Counts in parentheses are the number of substantive responses. Responses without a reliable direction are shown as neutral or unclear. Ordered by positive share.

Positive Mixed Neutral or unclear Negative



In Their Words

Among All Combined
Democratic Primary Voters

What voters said appealed to them, and what concerned them, about each leader. Responses are verbatim.

Mark Kelly

- “He will stand up for the American people unlike Trump.”
— VA, Black woman
- “He’s a corporate Dem that won’t implement changes needed because his loyalty is to donors”
— GA, White woman

Andy Beshear

- “He gets things done. A moderate who wants to solve problems not just hold to a rigid party line.” — GA, White man
- “He is fact based and calm, very important in a President. I am not sure he would fight for the minorities of the nation which is troubling for me.” — GA, Black woman

Gavin Newsom

- “Charismatic, experienced, strong, competent”
— NC, White woman
- “He gives off a ‘slick’ vibe that damages his trustworthiness.”
— GA, White man

Kamala Harris

- “Kamala would be a competent and qualified leader.”
— GA, Black woman
- “I love Kamala but she will never get elected, the time for a black female president is not here yet” — GA, Black man

Wes Moore

- “I like that crime went down and taxes were cut for working people.” — GA, Black man
- “His Wall Street ties and a lack of a will to fight for us”
— GA, White man

Alexandria Ocasio-Cortez

- “Gutsy, bold, articulate, and energizing!” — NC, White woman
- “Her connection with democratic socialist is a concern”
— GA, White woman

Cory Booker

- “Appears ethical, compassionate, and a leader”
— VA, White woman
- “AIPAC money will be a no in today’s environment. He’s a centrist with too much corporate influence.” — NC, White man

Josh Shapiro

- “He is a strong leader who gets things done” — GA, White man
- “He is certainly intelligent and competent. I am concerned about Israel Support.” — NC, White woman

Jon Ossoff

- “Hard on corruption and compassionate to abused and wrongly convicted” — VA, White woman
- “Concerned he might not fight hard enough, too moderate?” — NC, White woman

Pete Buttigieg

- “Articulate, thoughtful, organization and decision making skills, humanity” — GA, White man
- “Even in 2028, I’m not sure the American population as a whole will be willing to elect a gay man as president.”
— NC, White woman

JB Pritzker

- “Has shown he can be an effective and popular leader in a large state.” — NC, White man
- “Just another rich old white guy pulling the status quo.”
— NC, Black woman

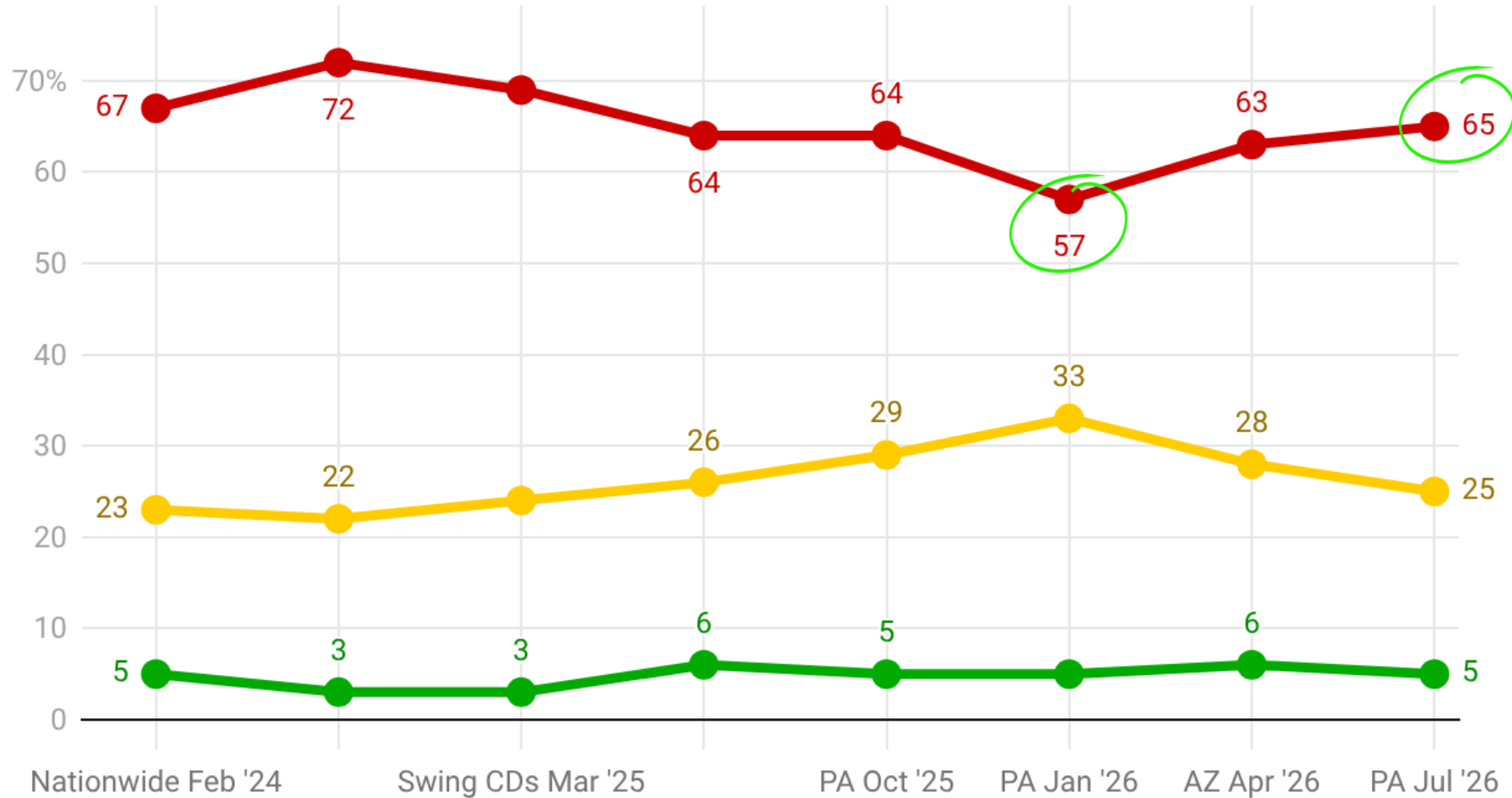
Early-2026 Gains Have Evaporated for Voters in Pennsylvania

A Landscape Driven by Costs and Few Democrats Breaking Through the Noise

Cost-of-Living Opinions Since '24

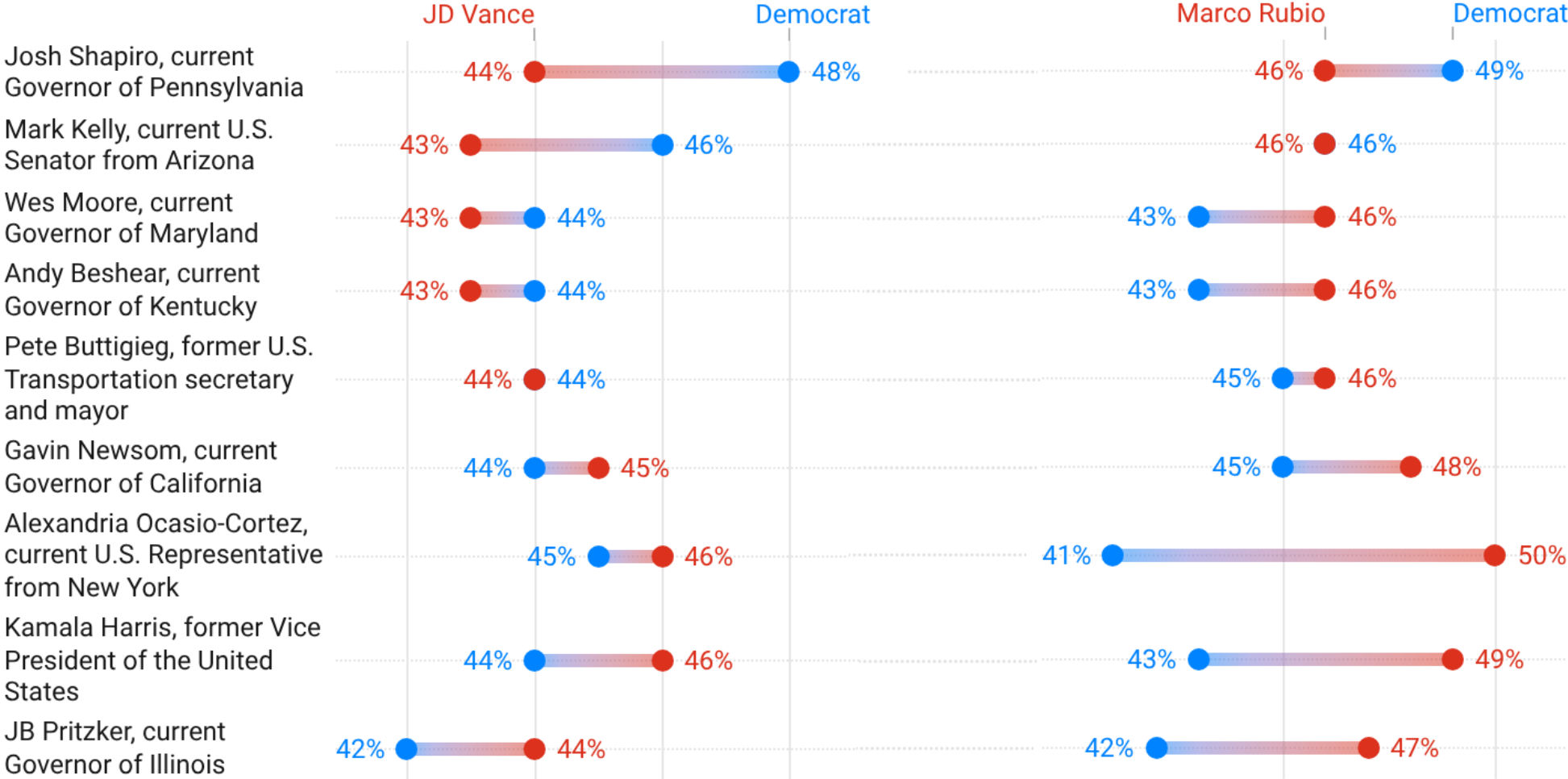
Would you say your income is:

— Falling behind — Staying even — Going up faster



2028 Hypothetical Scenarios

Among All
Pennsylvania
Voters

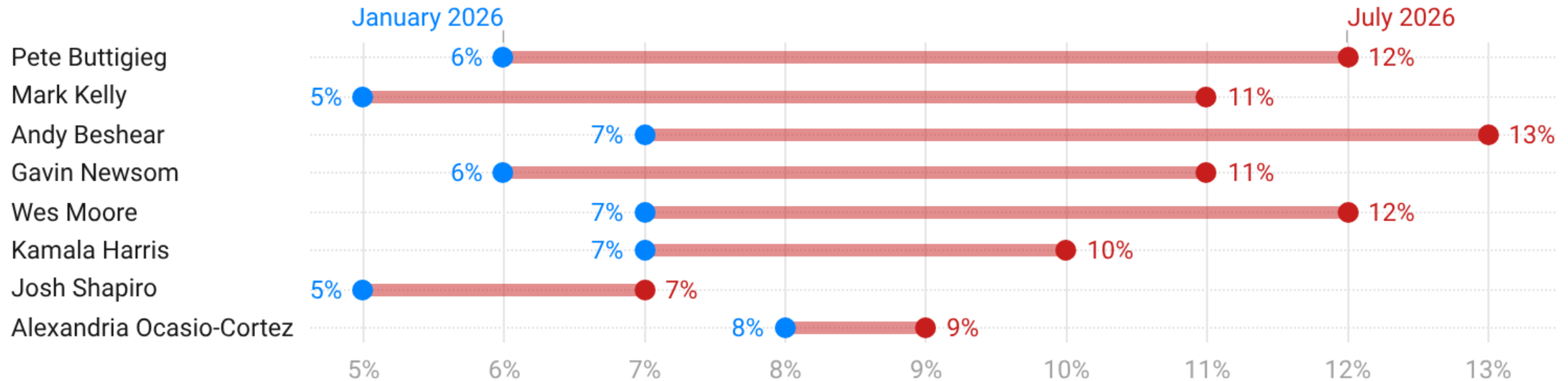


Undecided Voters Increase Since January

Among All
Pennsylvania
Voters



Share answering “not sure” when asked “If the general election is held today and the candidates are the following, who would you vote for?”
Each Democrat tested against JD Vance.



Potential Contender Profiles



TOPLINES

U.S. Senator Mark Kelly

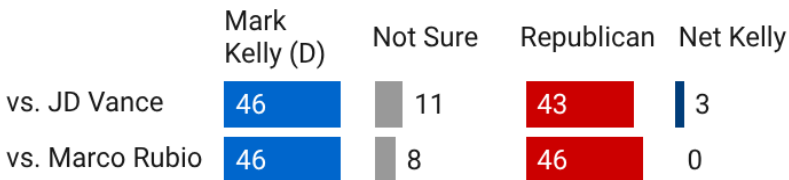
Summary:

In Pennsylvania, Mark Kelly is one of only two Democrats tested who does not trail either Republican, leading JD Vance 46-43 (+3) and drawing even with Marco Rubio at 46-46. Among Democratic primary voters in Georgia, North Carolina and Virginia, he is not quite yet a first-choice contender (7% in GA, 10% in NC and 15% in VA, rising to 10%, 13% and 18% after information). But he encounters almost no resistance, with 76-84% willing to consider supporting him after hearing his biography and only 6-8% who would be disappointed if he were the nominee. The gap between his low current vote share and his broad acceptability reflects a competence-first profile: primary voters rate him Qualified (55-62%) and Competent (52-72%) far more than Progressive (9-18%) or Liberal (9-16%), and 55% in Georgia and 69% in both North Carolina and Virginia say he could win a general election.

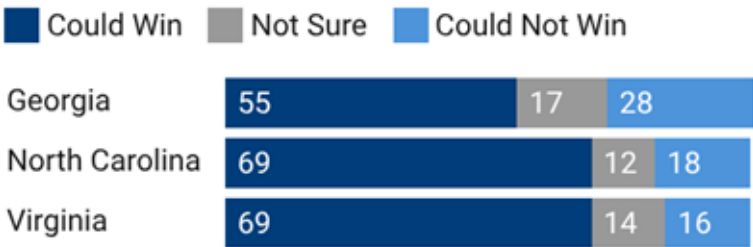
Mark Kelly | PA + GA/NC/VA Toplines

JULY 2026

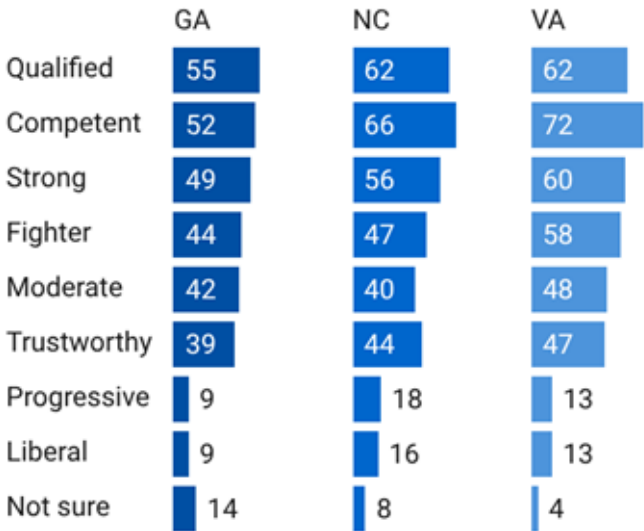
General Election Choice (PA All Voters)



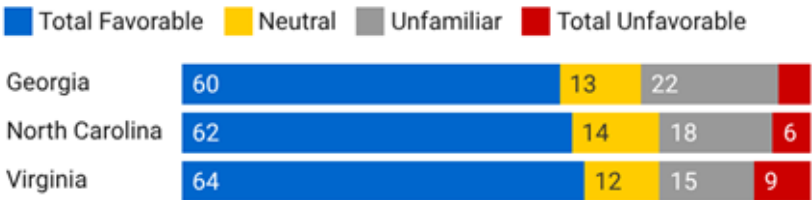
Ability to Win



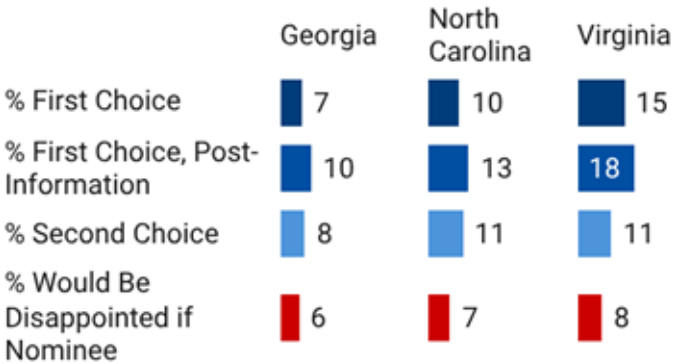
Traits Post Messaging



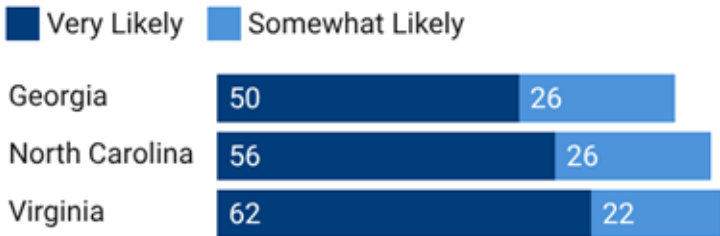
Personal Popularity



Primary Vote Choice



Willing to Consider Support Post Bio





TOPLINES

Governor Andy Beshear

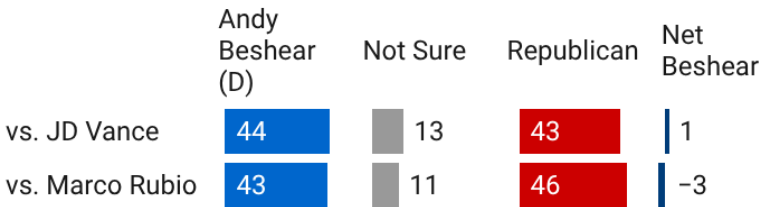
Summary:

In Pennsylvania, Andy Beshear narrowly leads JD Vance 44-43 (+1) but trails Marco Rubio 43-46 (-3), leaving him competitive against the sitting Vice President and behind the stronger of the two Republicans tested. Among Democratic primary voters in Georgia, North Carolina and Virginia he starts from a small base (3-4% first choice, rising only to 5-9% after information), with 23-27% still unfamiliar with him and favorability held to 44-49%. Where voters do know him he reads as a moderate administrator rather than a combatant, with Competent (57-65%) and Moderate (49-60%) far outranking Strong (26-36%) and Fighter (14-19%). 78-80% would consider supporting him after hearing his biography, but roughly half of that is only "somewhat likely," and just 47% of Virginia primary voters say he could win a general election.

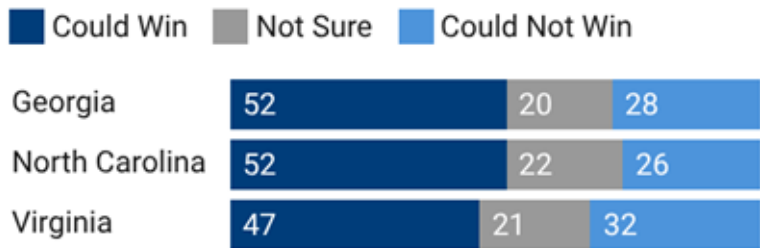
Andy Beshear | PA + GA/NC/VA Toplines

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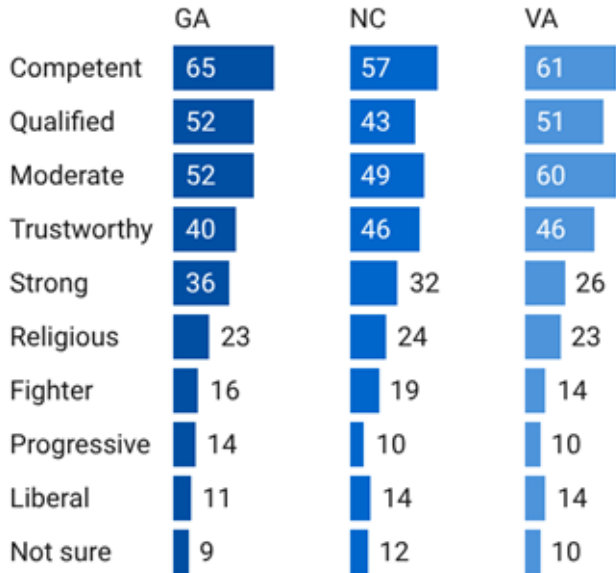
General Election Choice (PA All Voters)



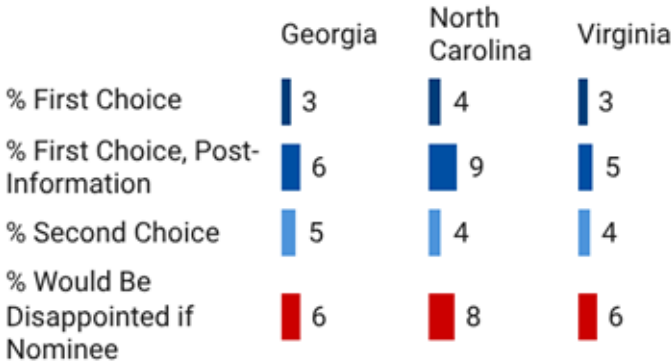
Ability to Win



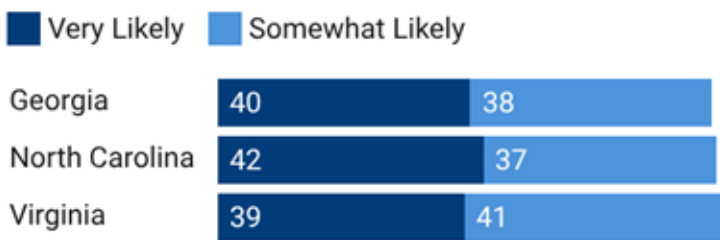
Traits Post Messaging



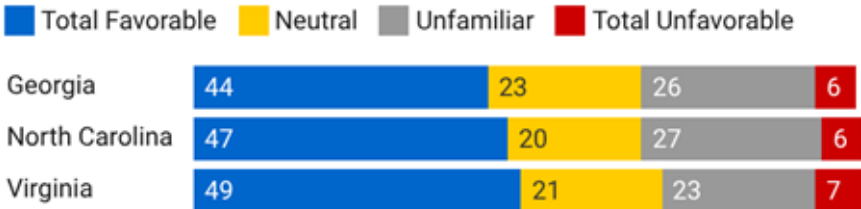
Primary Vote Choice



Willing to Consider Support Post Bio



Personal Popularity





TOPLINES

Governor Wes Moore

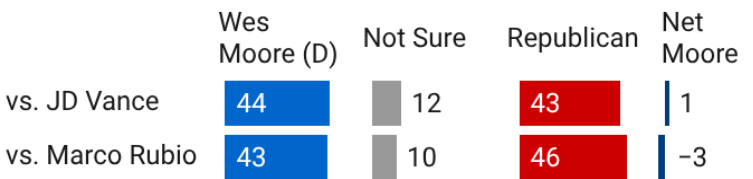
Summary:

In Pennsylvania, Wes Moore leads JD Vance 44-43 (+1) and trails Marco Rubio 43-46 (-3). Among Democratic primary voters in Georgia, North Carolina and Virginia he draws 3-4% first choice. 79-80% say they would consider supporting him after hearing his biography, and the voters who do know him rate him Qualified (57-64%) and Competent (55-66%) while also crediting him as a Fighter (35-38%), though he carries a more ideological read (Progressive 21-24%, Liberal 18-21%), and North Carolina is consistently his weakest state, where just 45% believe he could win a general election.

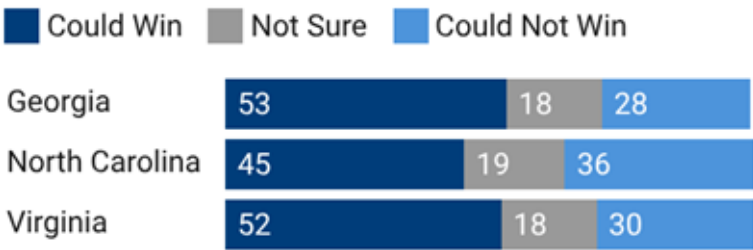
Wes Moore | PA + GA/NC/VA Toplines

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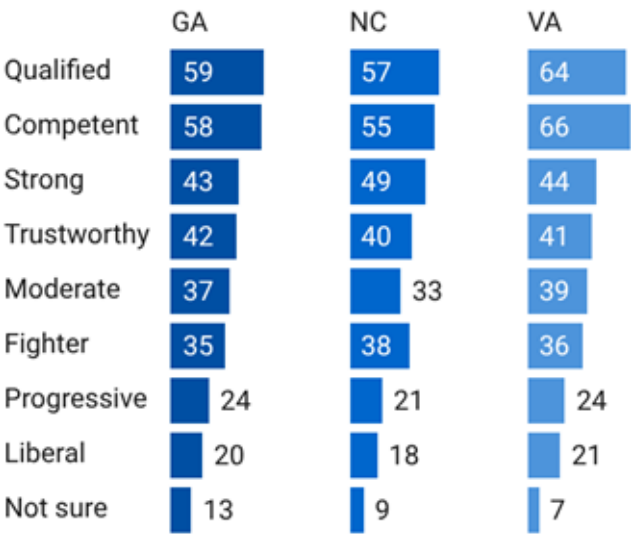
General Election Choice (PA All Voters)



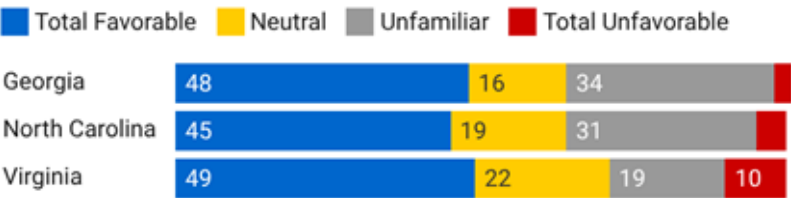
Ability to Win



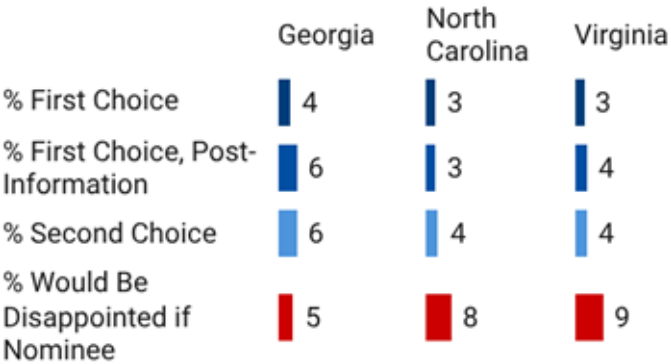
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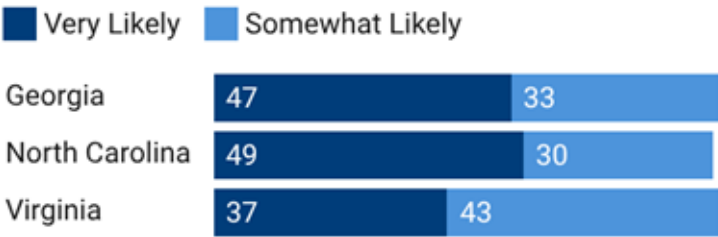
Personal Popularity



Primary Vote Choice



Willing to Consider Support Post Bio





TOPLINES

Governor Josh Shapiro

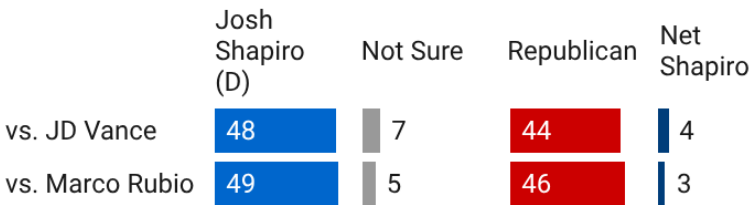
Summary:

In Pennsylvania, Josh Shapiro leads JD Vance 48-44 (+4) and Marco Rubio 49-46 (+3), with only 7% and 5% undecided across the two matchups – as the state's sitting governor, he is a known quantity to PA voters. Among Democratic primary voters in Georgia, North Carolina and Virginia he draws 2-4% first choice and gains little after his biography. While 71-77% would consider supporting him, 10-11% say they would be disappointed if he were the nominee. Voters rate him Competent (44-49%) and Qualified (40-44%) but weaker on Trustworthy (15-24%) and Strong (25-28%). Confidence in his general-election viability slides across the map from 49% in Georgia to 46% in North Carolina to 42% in Virginia, where more primary voters say he could not win (44%) than say he could (42%).

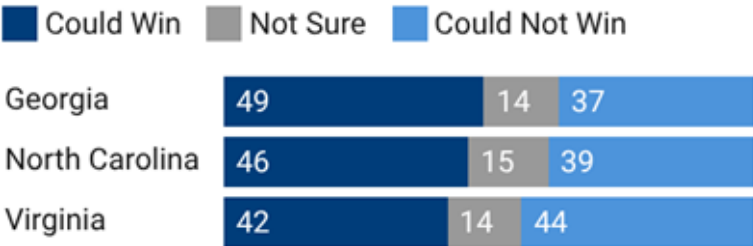
Josh Shapiro | PA + GA/NC/VA Toplines

JULY 2026

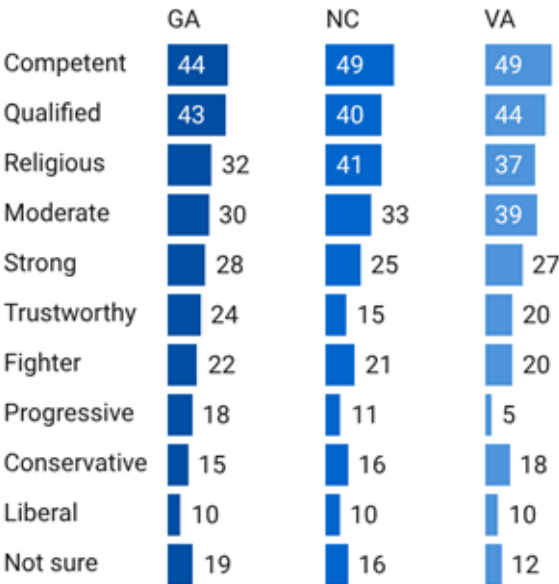
General Election Choice (PA All Voters)



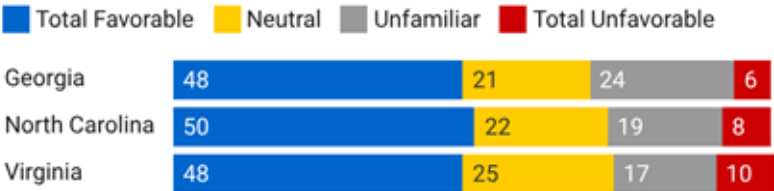
Ability to Win



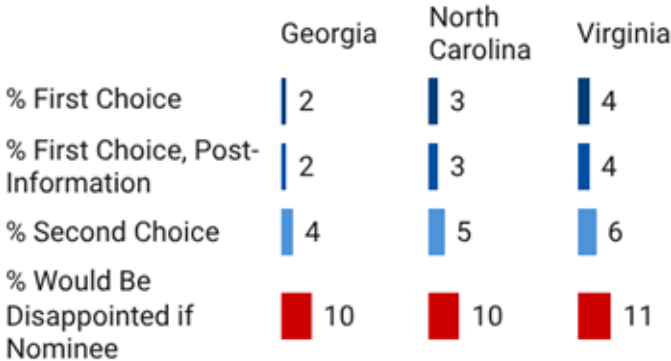
Traits Post Messaging



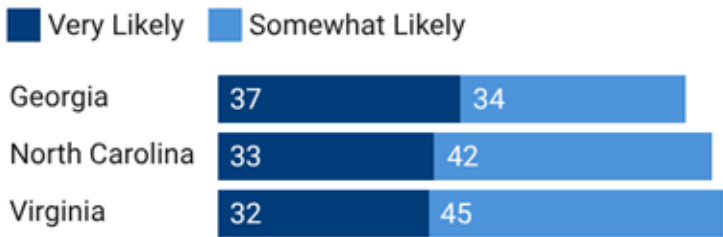
Personal Popularity



Primary Vote Choice



Willing to Consider Support Post Bio





TOPLINES

Secretary Pete Buttigieg

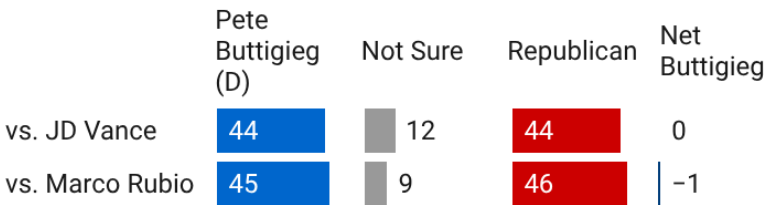
Summary:

In Pennsylvania, Pete Buttigieg draws even with JD Vance at 44-44 and trails Marco Rubio 45-46 (-1). Among Democratic primary voters in Georgia, North Carolina and Virginia he opens at 8-14% first choice, but information costs him support rather than building it (slipping to 10% in North Carolina and 13% in Virginia and holding flat at 8% in Georgia) while 9-15% say they would be disappointed if he were the nominee. He is well known and well liked, with only 5-11% unfamiliar, favorability of 66-67% and strong marks for Competent (58-71%), yet voters doubt his viability. In all three states, more say he could not win a general election than say he could.

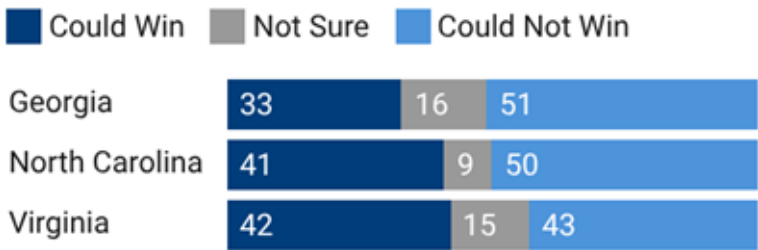
Pete Buttigieg | PA + GA/NC/VA Toplines

JULY 2026

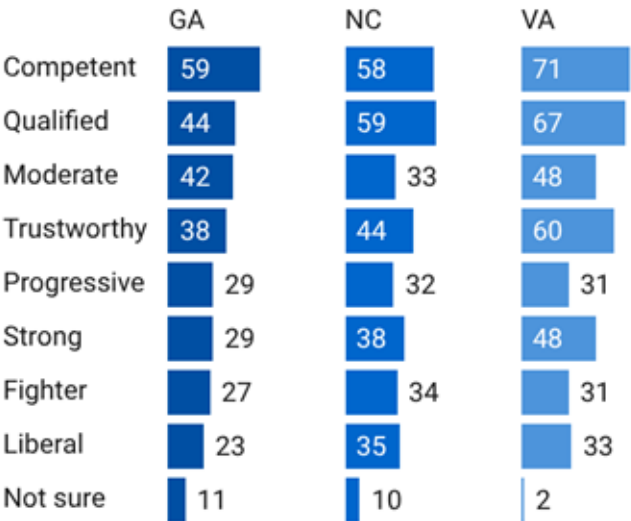
General Election Choice (PA All Voters)



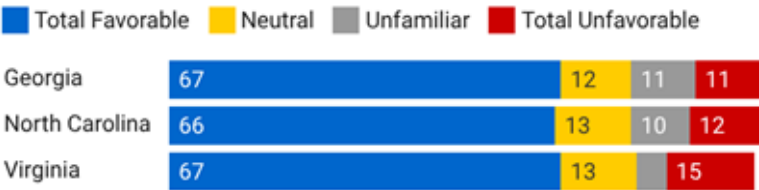
Ability to Win



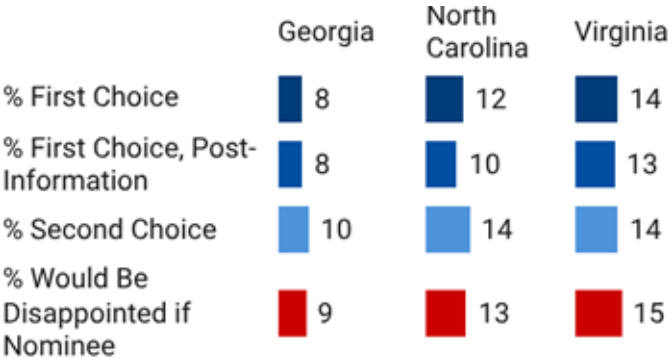
Traits Post Messaging



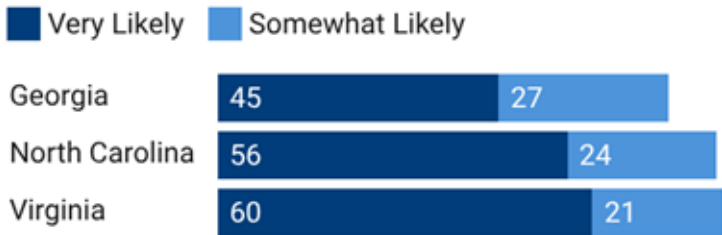
Personal Popularity



Primary Vote Choice



Willing to Consider Support Post Bio





TOPLINES

Vice President Kamala Harris

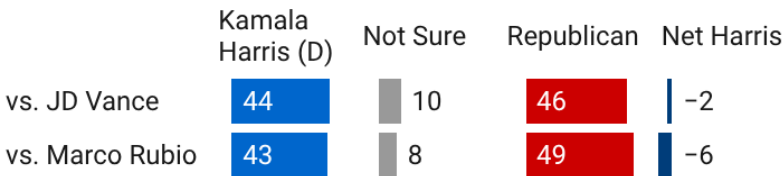
Summary:

In Pennsylvania, Kamala Harris trails JD Vance 44-46 (-2) and Marco Rubio 43-49 (-6). Among Democratic primary voters in Georgia, North Carolina and Virginia she opens at 17%, 14% and 8% first choice but loses ground after information in all three states. Resistance is substantial, with 26% in Georgia, 33% in North Carolina and 39% in Virginia saying they would be disappointed if she were the nominee. She is universally known and rates highly on Qualified (62-67%) and Competent (56-60%), but her standing weakens consistently from Georgia to Virginia. Notably, “Weak” was identified as a trait by 11% of primary voters in Georgia, 13% in North Carolina, and 24% in Virginia.

Kamala Harris | PA + GA/NC/VA Toplines

JULY 2026

General Election Choice (PA All Voters)

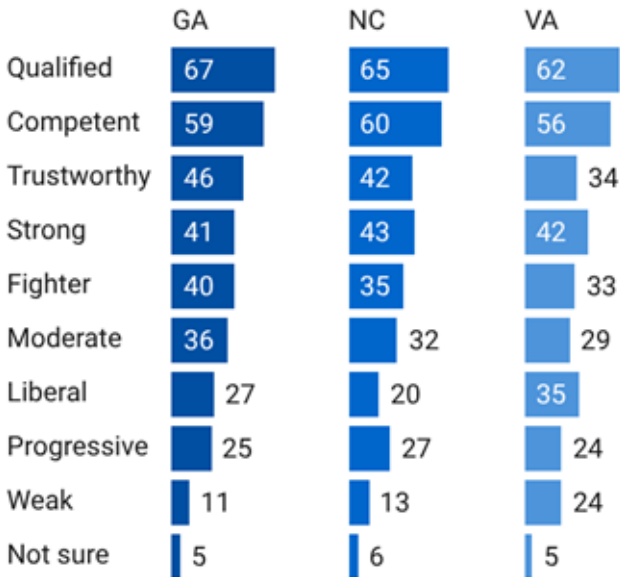


Ability to Win

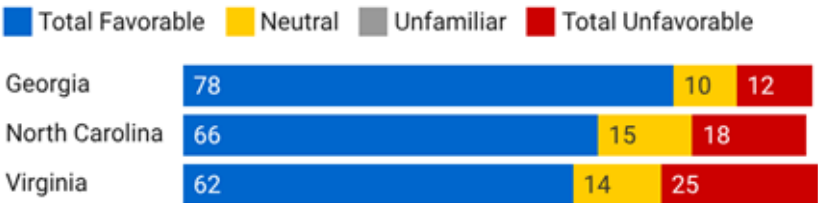
Could Win Not Sure Could Not Win



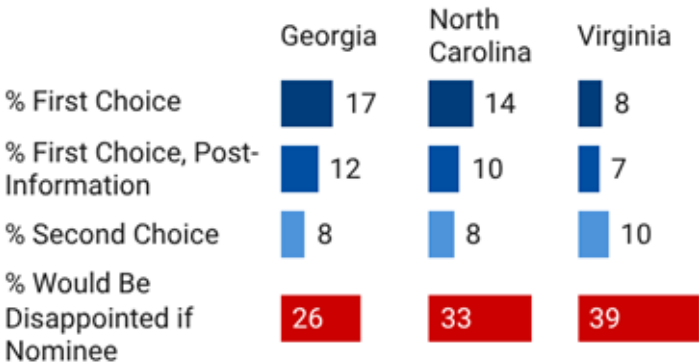
Traits Post Messaging



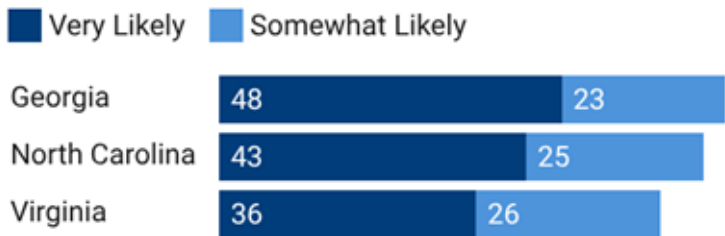
Personal Popularity



Primary Vote Choice



Willing to Consider Support Post Bio





TOPLINES

Governor JB Pritzker

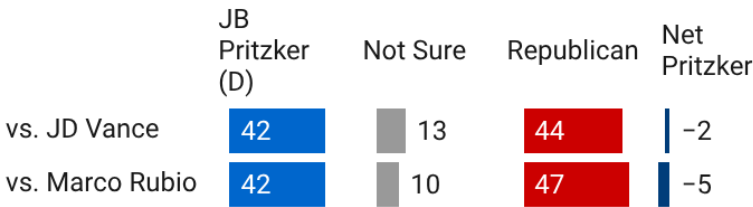
Summary:

In Pennsylvania, JB Pritzker trails both JD Vance 42-44 (-2) and Marco Rubio 42-47 (-5). Among Democratic primary voters in Georgia, North Carolina and Virginia, he draws 1-3% first choice, moving only to 2-4% after information, with 25-32% still unfamiliar with him and favorability at 44-47%, though 74-80% say they would consider supporting him after hearing his biography. Yet voters credit him with viability and force. Majorities in all three states say he could win a general election, including 60% in Georgia, 53% in North Carolina and 57% in Virginia. They rate him Competent (48-57%), Qualified (47-60%) and Strong (42-47%), though Trustworthy trails at 23-28% and Moderate at 16-25%.

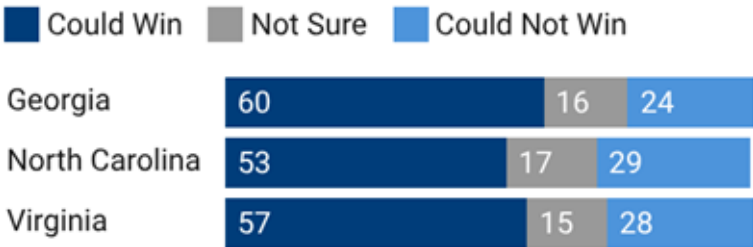
JB Pritzker | PA + GA/NC/VA Toplines

JULY 2026

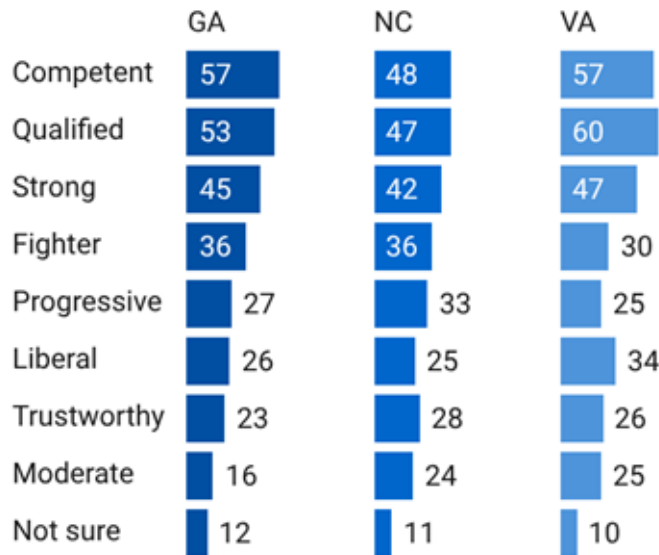
General Election Choice (PA All Voters)



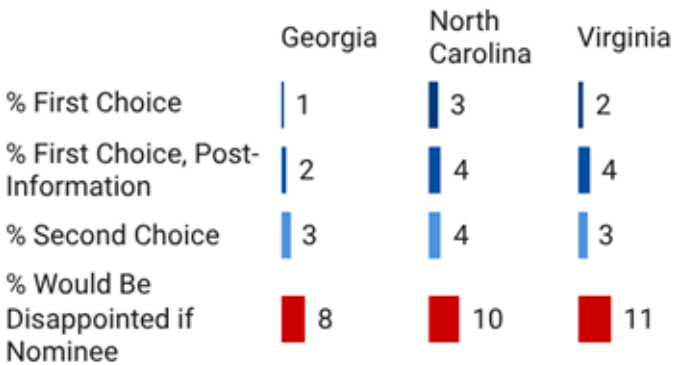
Ability to Win



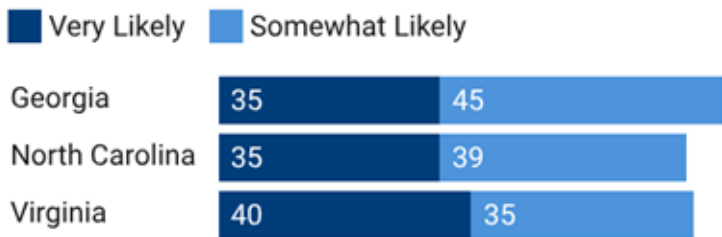
Traits Post Messaging



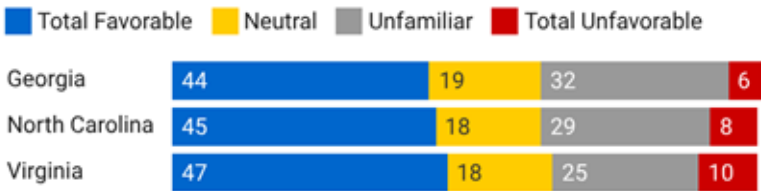
Primary Vote Choice



Willing to Consider Support Post Bio



Personal Popularity





TOPLINES

Governor Gavin Newsom

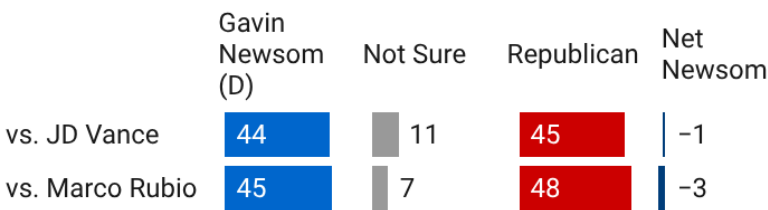
Summary:

In Pennsylvania, Gavin Newsom trails both JD Vance 44-45 (-1) and Marco Rubio 45-48 (-3). Among Democratic primary voters in Georgia, North Carolina and Virginia he opens at 13-15% first choice and mostly holds after information. Resistance builds across the map as disappointment if he were the nominee rises as high as 22%. Still, his clearest asset is perceived electability. 71% in Georgia, 71% in North Carolina and 62% in Virginia say he could win a general election. He's seen as a Fighter (49-56%), Qualified (52-58%) and Strong (49-53%).

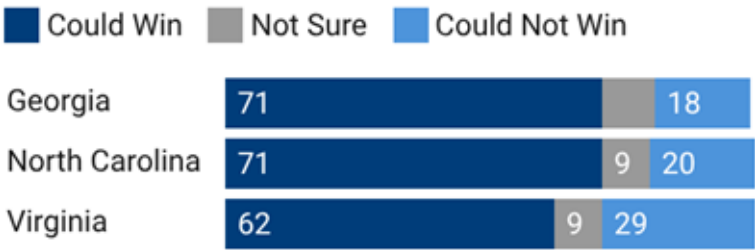
Gavin Newsom | PA + GA/NC/VA Toplines

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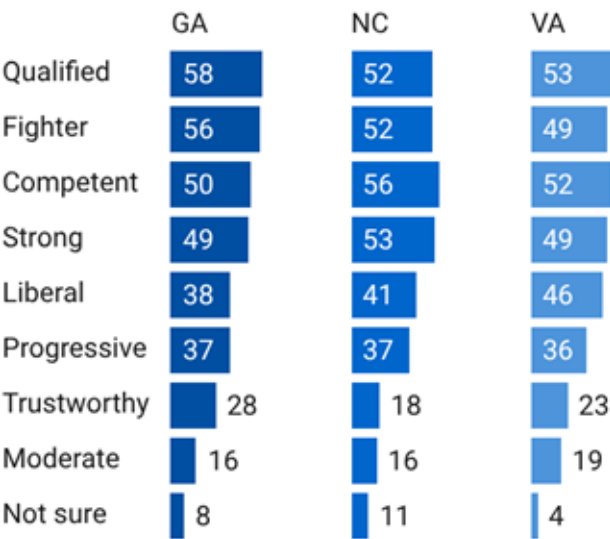
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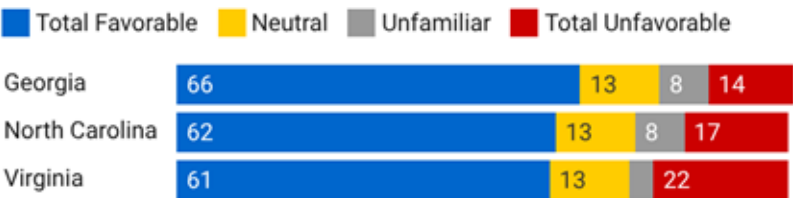
Ability to Win



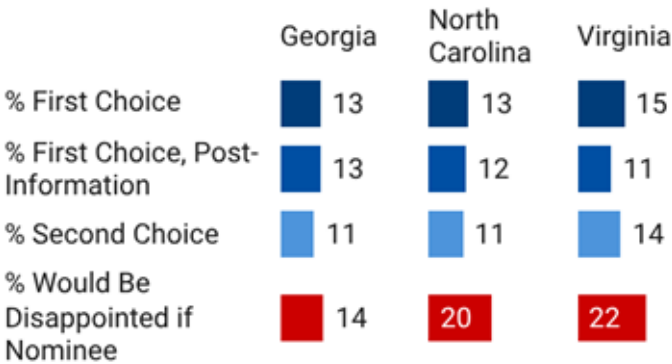
Traits Post Messaging



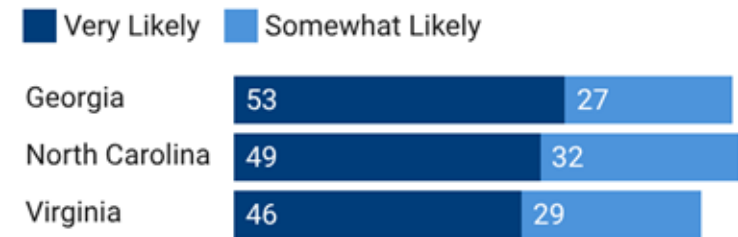
Personal Popularity



Primary Vote Choice



Willing to Consider Support Post Bio



Statewide survey of PA voters (n=1,074, July 10-15, 2026) and Democratic primary voters in GA (n=1,072, July 10-20), NC (n=1,132, July 10-20), and VA (n=1,084, July 10-19, 2026). Leader modules were split-sampled. Trait items are "choose all that apply" and total more than 100%.



TOPLINES

Rep. Alexandria Ocasio-Cortez

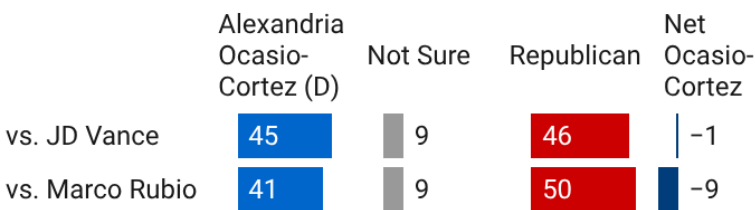
Summary:

In Pennsylvania, Alexandria Ocasio-Cortez runs within a point of JD Vance at 45-46 (-1) but falls nine points behind Marco Rubio at 41-50. Among Democratic primary voters in Georgia, North Carolina and Virginia she draws 5-11% first choice while 16% in Georgia, 22% in North Carolina and 26% in Virginia say they would be disappointed if she were the nominee. Her identity is sharply ideological, rated Progressive at 62-71% and Liberal at 46-50% against Moderate at just 3-7%, and primary voters credit her as a Fighter (58-63%) with favorability of 64-69%. However, they do not believe she can win: 50% in Georgia, 58% in North Carolina and 59% in Virginia say she could not, against 35%, 28% and 29% who say she could.

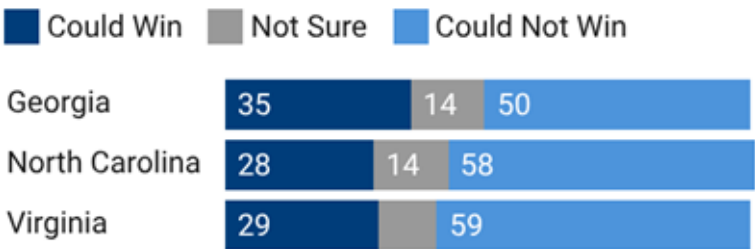
Alexandria Ocasio-Cortez | PA + GA/NC/VA Toplines

JULY 2026

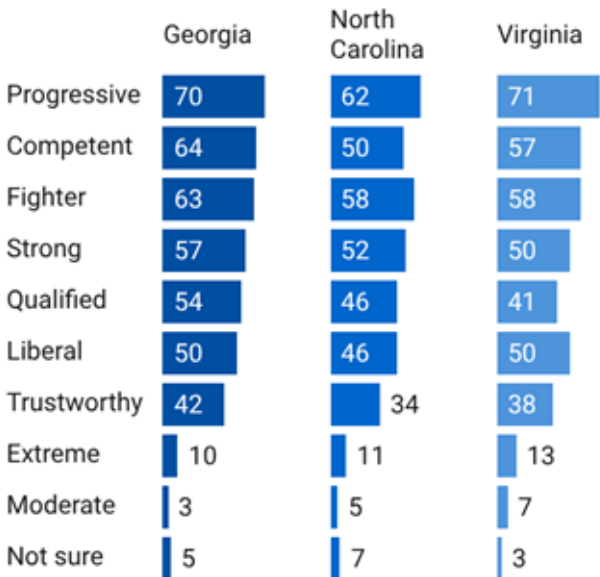
General Election Choice (PA All Voters)



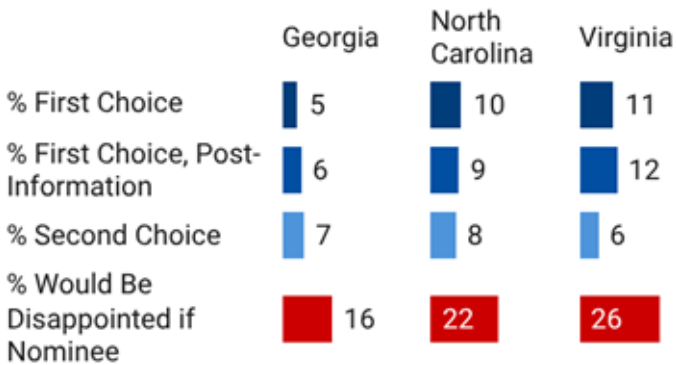
Ability to Win



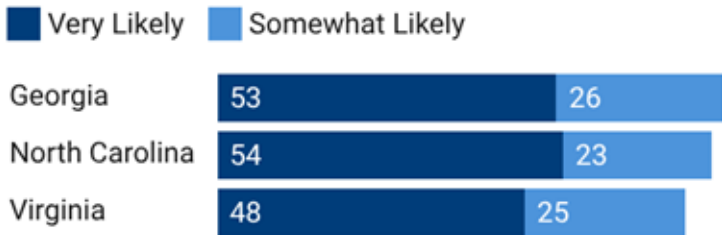
Traits Post Messaging



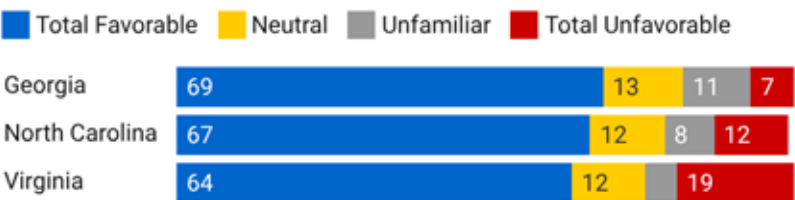
Primary Vote Choice



Willing to Consider Support Post Bio



Personal Popularity





TOPLINES

Senator Jon Ossoff

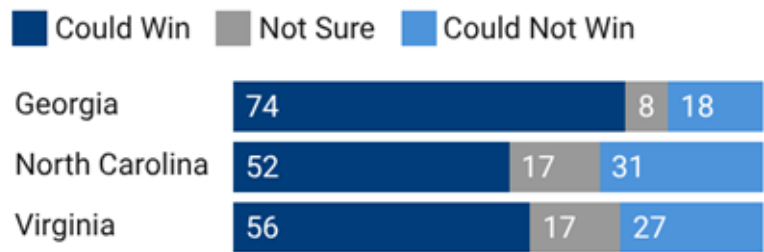
Summary:

Jon Ossoff enjoys a notable advantage in his home state, with 13% first choice rising to 14% after information, 16% second choice, 94% willing to consider supporting him, and 74% saying he could win a general election. He receives high marks for Competent (72%), Qualified (70%), Trustworthy (62%) and Strong (61%). However, outside Georgia he remains less known, with 27% unfamiliar in both North Carolina and Virginia, favorability 50-53% and first choice at 2-3%. Still, information moves Democratic primary voters toward him, lifting his first-choice share to 6% in both states and only 6-8% disappointed across all three. Majorities say he could win a general election (52% in North Carolina, 56% in Virginia). Given his standing, Ossoff will be included in Leadership 2028's head-to-head tracking moving forward.

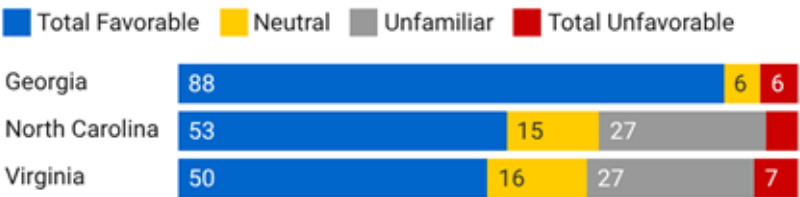
Jon Ossoff | GA/NC/VA Toplines

JULY 2026

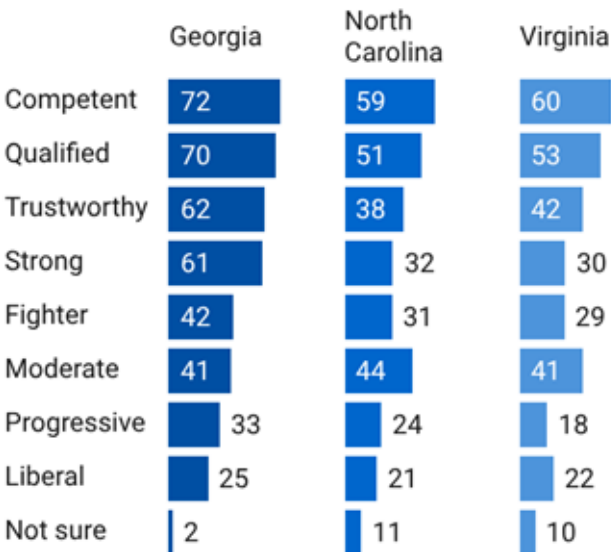
Ability to Win



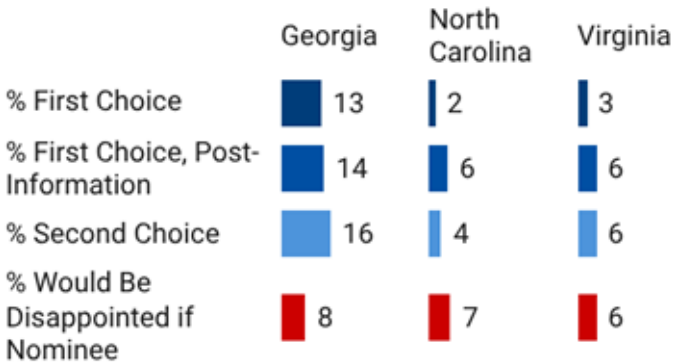
Personal Popularity



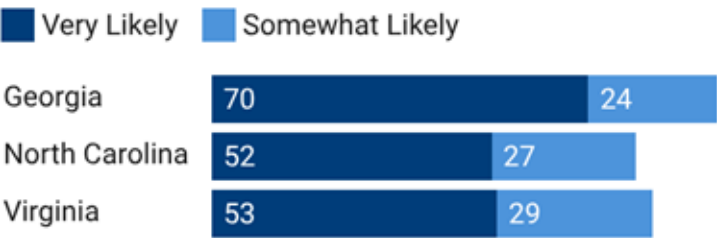
Traits Post Messaging



Primary Vote Choice



Willing to Consider Support Post Bio





TOPLINES

Senator Cory Booker

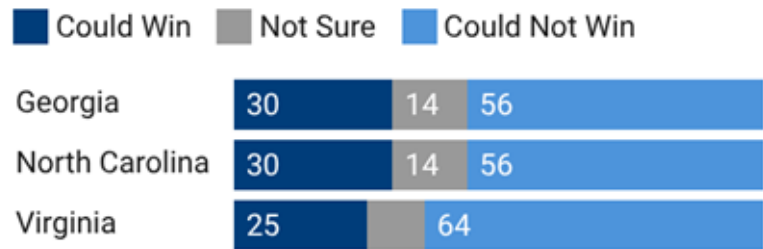
Summary:

Cory Booker is well known but does not gain ground. Only 8-12% are unfamiliar with him, yet he draws just 3-4% first choice and loses support after information in all three states, falling to 2%, 3% and 2%, while 19-21% say they would be disappointed if he were the nominee. Voters rate him Qualified (35-51%) and Competent (39-42%) but weak on Fighter (16-30%) and Trustworthy (21-25%). With 17-22% describing him as Weak outright, they do not believe he can win: 56% in Georgia, 56% in North Carolina and 64% in Virginia say he could not. Given his standing, Booker will not be included in Leadership 2028's head-to-head tracking moving forward.

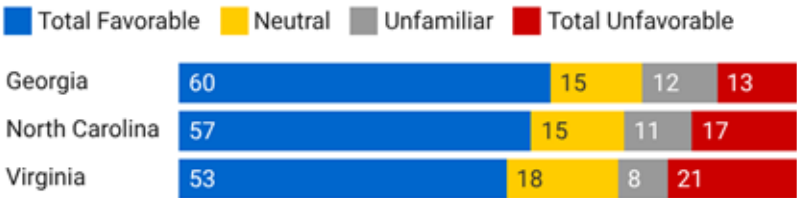
Cory Booker | GA/NC/VA Toplines

JULY 2026

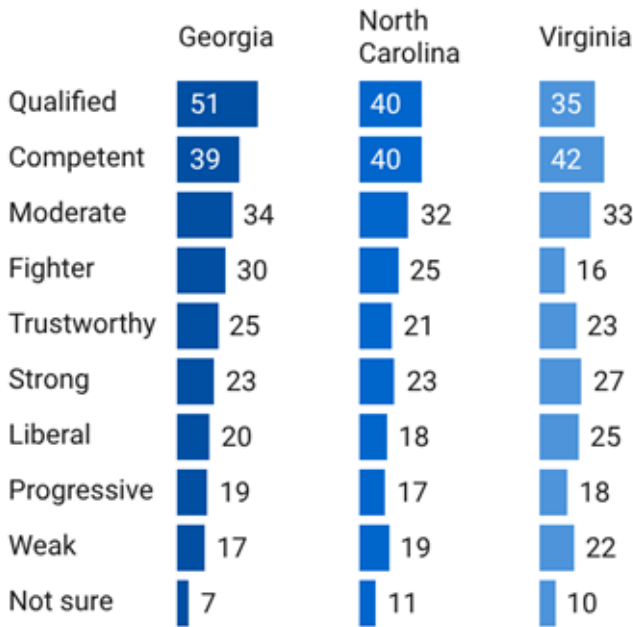
Ability to Win



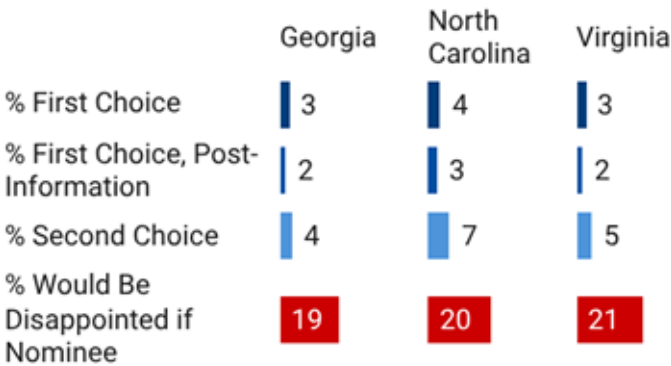
Personal Popularity



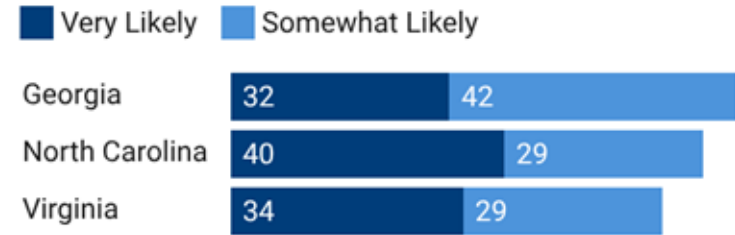
Traits Post Messaging



Primary Vote Choice



Willing to Consider Support Post Bio



State by State: The Democratic Primary Landscape is Wide Open

First Choice – Georgia

Among All Georgia
Democratic Primary Voters



	All	Women	Men	18-34	35-49	50-64	65+	White	Black
Kamala Harris	17	21	11	20	18	18	13	3	25
Jon Ossoff	13	14	12	23	18	10	8	16	11
Gavin Newsom	13	11	17	6	6	20	16	12	15
Pete Buttigieg	8	8	8	4	10	7	10	16	3
Raphael Warnock	8	8	8	9	7	7	8	4	11
Mark Kelly	7	6	9	1	6	8	11	14	3
AOC	5	5	6	17	7	2	1	9	3
Wes Moore	4	4	5	0	5	5	5	1	6
Cory Booker	3	4	2	1	3	5	3	2	4
Andy Beshear	3	2	5	1	4	3	2	4	2
Josh Shapiro	2	2	3	1	2	3	2	2	2
Not sure	11	11	10	15	9	7	13	12	11

First or Second Choice – Georgia

Among All Georgia
Democratic Primary Voters



	All	Women	Men	18-34	35-49	50-64	65+	White	Black
Jon Ossoff	29	32	24	50	36	26	18	34	25
Kamala Harris	25	28	21	20	22	24	27	7	36
Gavin Newsom	24	24	24	16	19	30	27	18	28
Pete Buttigieg	18	18	18	7	22	18	19	33	8
Raphael Warnock	16	16	16	12	16	16	16	9	21
Mark Kelly	15	13	18	3	12	19	20	26	8
AOC	12	12	11	30	15	9	5	15	9
Wes Moore	10	9	13	2	11	12	12	2	16
Andy Beshear	8	7	10	8	6	8	8	12	6
Cory Booker	7	8	5	4	7	13	4	5	8
Josh Shapiro	6	6	8	1	5	5	9	7	6
Not sure	16	16	14	24	15	10	17	14	18

First Choice – North Carolina

Among All North Carolina
Democratic Primary Voters



	All	Women	Men	18-34	35-49	50-64	65+	White	Black
Kamala Harris	14	15	10	10	20	12	12	6	27
Gavin Newsom	13	12	14	7	13	16	14	11	16
Pete Buttigieg	12	13	9	10	12	11	12	17	3
Mark Kelly	10	10	10	1	5	13	14	15	3
AOC	10	9	11	39	15	3	1	13	3
Andy Beshear	4	3	5	4	2	5	4	5	3
Cory Booker	4	5	2	2	1	3	6	3	6
Wes Moore	3	2	5	1	2	4	4	1	7
JB Pritzker	3	3	3	1	4	2	4	4	2
Josh Shapiro	3	2	4	1	2	4	3	4	1
Jon Ossoff	2	1	4	2	2	3	2	3	1
Raphael Warnock	2	2	3	1	2	4	2	0	6
Not sure	17	19	15	16	18	18	17	15	21

First or Second Choice – North Carolina

Among All North Carolina
Democratic Primary Voters



	All	Women	Men	18-34	35-49	50-64	65+	White	Black
Pete Buttigieg	26	26	23	13	29	24	27	34	11
Gavin Newsom	24	23	25	16	24	26	26	22	27
Kamala Harris	22	24	16	24	26	21	19	12	39
Mark Kelly	21	20	22	5	16	23	27	26	10
AOC	18	18	17	53	29	10	6	21	11
Cory Booker	11	12	10	11	8	8	14	8	16
Andy Beshear	8	6	9	8	4	8	8	11	3
Josh Shapiro	8	7	10	4	4	11	10	8	10
Wes Moore	7	6	9	3	6	5	10	2	16
JB Pritzker	7	7	8	4	7	9	9	10	5
Jon Ossoff	6	5	9	6	6	9	5	9	4
Raphael Warnock	5	4	7	5	3	6	5	2	10
Not sure	28	31	24	38	33	26	24	24	35

First Choice – Virginia

Among All Virginia
Democratic Primary Voters



	All	Women	Men	18-34	35-49	50-64	65+	White	Black
Mark Kelly	15	15	15	3	9	13	24	18	4
Gavin Newsom	15	14	15	6	12	16	17	14	15
Pete Buttigieg	14	15	12	7	17	16	15	17	4
AOC	11	11	12	34	18	5	2	10	10
Kamala Harris	8	9	5	10	6	11	5	4	23
Josh Shapiro	4	3	6	4	4	6	4	5	4
Andy Beshear	3	2	4	3	1	5	3	4	0
Jon Ossoff	3	2	3	2	4	1	4	3	2
Wes Moore	3	3	3	2	3	2	4	1	11
Cory Booker	3	4	1	3	2	3	3	2	7
JB Pritzker	2	3	2	1	2	2	3	3	2
Not sure	14	13	15	16	14	16	12	13	15

First or Second Choice – Virginia

Among All Virginia
Democratic Primary Voters



	All	Women	Men	18-34	35-49	50-64	65+	White	Black
Gavin Newsom	29	29	26	19	25	29	32	27	32
Pete Buttigieg	28	30	25	26	29	35	26	33	11
Mark Kelly	26	26	25	7	14	25	38	30	9
Kamala Harris	18	20	14	28	20	19	11	12	41
AOC	17	18	17	41	33	9	4	16	13
Josh Shapiro	10	8	14	7	6	12	14	11	12
Jon Ossoff	9	6	11	7	9	8	10	8	9
Cory Booker	8	11	5	6	9	7	10	6	19
Andy Beshear	7	5	10	4	5	8	9	8	5
Wes Moore	7	7	8	5	7	7	8	5	18
JB Pritzker	5	7	4	4	2	6	7	7	2
Not sure	21	20	22	27	24	20	17	19	20

Democrats Remain Highly Motivated

Motivation to Vote in Primary

Among All
Georgia
Democratic
Primary Voters



How motivated are you to vote in the 2028 Democratic primary election for President on a scale from 0 to 10, where a 0 means you are not motivated at all and a 10 means you are extremely motivated to vote?

Motivation Score	Total	18-34	35-49	50-64	65+	Women	Men	White	Black
Highly Motivated (8-10)	89	80	87	90	94	91	86	88	90
Moderately Motivated (4-7)	9	12	11	7	4	7	11	9	7
Not Motivated (0-3)	3	7	2	1	1	2	4	3	3

Motivation to Vote in Primary

Among All North Carolina
Democratic Primary Voters



How motivated are you to vote in the 2028 Democratic primary election for President on a scale from 0 to 10, where a 0 means you are not motivated at all and a 10 means you are extremely motivated to vote?

Motivation Score	Total	18-34	35-49	50-64	65+	Women	Men	White	Black
Highly Motivated (8-10)	88	78	86	89	93	92	83	89	87
Moderately Motivated (4-7)	9	18	10	7	6	7	12	8	11
Not Motivated (0-3)	3	4	4	3	1	1	4	3	2

Motivation to Vote in Primary

Among All Virginia
Democratic Primary Voters



How motivated are you to vote in the 2028 Democratic primary election for President on a scale from 0 to 10, where a 0 means you are not motivated at all and a 10 means you are extremely motivated to vote?

Motivation Score	Total	18-34	35-49	50-64	65+	Women	Men	White	Black
Highly Motivated (8-10)	84	81	81	82	88	88	78	85	87
Moderately Motivated (4-7)	13	15	16	14	9	9	17	13	11
Not Motivated (0-3)	3	4	4	4	3	2	5	3	3

What This Means

What This Means

- **The path for Democrats is unclaimed.** With no leader above 17% and undecideds at 11-17%, this potential field is still being shaped by what voters learn more than by who they already know.
- **Introduction is worth more than name recognition.** Mark Kelly, Andy Beshear, and Jon Ossoff gain when voters hear more. The better-known leaders have less room to grow.
- **Electability may be a gate for some.** Alexandria Ocasio-Cortez (28-35% say she could win), Cory Booker (25-30%) and Pete Buttigieg (33-42%) are all reasonably well liked and still capped, because more primary voters say they cannot win than say they can. Favorability does not convert without a credible path.
- **Resistance is informative.** Kamala Harris (26-39% would be disappointed), Alexandria Ocasio-Cortez (16-26%) and Gavin Newsom (14-22%) carry ceilings that span from Georgia to Virginia. Mark Kelly, Andy Beshear, Wes Moore and Jon Ossoff sit at 5-9% disappointment in every state, the widest room to grow in the field.
- **Pennsylvania is facing a cost-of-living election.** Voters' read on their own finances is back where it was in October 2025. The response is abstention rather than realignment – undecideds rose in all eight 2028 matchups since January.
- **Where this goes next.** Jon Ossoff joins Leadership 2028 head-to-head tracking. The frame that fits this electorate continues to be financial freedom paired with cleaning up corruption.

Methodology

Overview: In partnership with Change Research, Future Majority has conducted four major polling waves over the last nine months across nine states that will likely influence the 2028 Democratic nomination and the general election. All surveys were conducted using Change Research's Dynamic Online Sampling.

July 2026 Wave:

- 1,072 Democratic primary voters in Georgia (July 10-20, 2026)
- 1,132 Democratic primary voters in North Carolina (July 10-20, 2026)
- 1,084 Democratic primary voters in Virginia (July 10-19, 2026)
- 1,074 general election voters in Pennsylvania (July 10-15, 2026)

April 2026 Wave:

- 1,123 Democratic primary voters in New Hampshire (April 16-21, 2026)
- 1,029 Democratic primary voters in Michigan (April 16-21, 2026)
- 1,048 general election voters in Arizona (April 15-21, 2026)

January – February 2026 Wave:

- 1,350 general election voters in Pennsylvania (January 30-February 2, 2026)
- 1,018 Democratic primary voters in South Carolina (January 31-February 5, 2026)
- 806 Democratic primary voters in Nevada (January 31-February 5, 2026)

October 2025 Wave:

- 1,249 general election voters in Pennsylvania (October 2-7, 2025)
- 1,018 Black voters across Georgia, Michigan, North Carolina, and South Carolina (October 2-9, 2025)



Future
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Paid for by Future Majority, Inc.
www.futuremajority.org