

THE ALABAMA POLL

What \$6 Million Bought — and What It Didn't

By Michael Lowry, *The Alabama Poll* — March 2026

Key Finding: Three candidates are statistically tied in Alabama's Republican primary for U.S. Senate — **Barry Moore** at 22.8%, **Steve Marshall** at 20.7%, and **Jared Hudson** at 19.0% — each within the poll's $\pm 4.0\%$ margin of error, with 34.5% of voters still firmly undecided. The conventional wisdom holds that President Trump's endorsement and over \$6 million in committed outside spending have effectively decided this race. The crosstabs disagree. **I follow the data. Right now, the data says the conventional wisdom is wrong.**

THE SENATE RACE: A Three-Way Dead Heat

The Ballot — Four-Poll Trend

The race that was described as *fait accompli* after the Trump endorsement is, by the data, a three-way statistical tie. All three leading candidates sit within one percentage point of each other and within the poll's margin of error.

Candidate	Aug 2025	Dec 2025	Feb 2026	Mar 2026
Steve Marshall	37%	30%	26%	20.7%
Barry Moore	16%	12%	17%	22.8%
Jared Hudson	7%	8%	8%	19.0%
Rodney Walker	1%	3%	4%	3.0%
Undecided	40%	46%	43%	34.5%*

*34.5% 'firm' undecided; additional voters lean toward a candidate but remain persuadable.

Marshall's Numbers: Consolidation, Not Collapse

The trajectory from 37% to 20.7% looks like a decline. It isn't. It is field clarification — the organic, name-ID-driven default vote separating from the genuinely committed coalition as the field became more competitive. The 20.7% that remains is fire-hardened. It has not moved against \$6 million in opposing outside spending, a presidential endorsement, and a full eight months of a campaign being run directly against it. That is not a retreat. That is a proven floor.

The more important question is the ceiling. **Marshall** enters the advertising phase with a 39.5% favorable rating, geographic breadth across markets representing 78% of the electorate, and a cash position of ~\$562,000 unspent as of year-end financial data on file with the FEC. His first advertising dollar goes into a universe that already knows and likes him. That is not the profile of a candidate losing a race — that is the profile of a candidate who has not yet shown his full hand.

The Financial Landscape

This table is the central analytical fact of the March 2026 Alabama Poll:

	Barry Moore	Steve Marshall	Jared Hudson
Direct Fundraising (2025)	~\$1.35M	~\$1.11M	~\$853K
Outside Spending (FEC-reported)	\$5.2M+	None	None
Outside Spending (announced)	\$1.25M (Club for Growth)	None	None
Total Committed Resources	~\$7.8M+	~\$1.11M	~\$853K
Cash on Hand (entering 2026)	~\$1.1M	~\$562K	~\$428K
Paid Advertising Deployed	Yes	None	None
Outside Spending vs. Opponent	\$6.45M+ spent	\$0 vs. Moore	\$0 vs. Moore

The Cost-Per-Point Problem

Over \$5.2 million in FEC-reported outside spending — with an additional \$1.25 million announced by Club for Growth — has accompanied Moore’s movement from 16% to 22.8%, a gain of 6.8 percentage points since August 2025. That works out to roughly **\$950,000 per net percentage point gained**. That is not a sustainable model for the final stretch of a primary, and it is not a number that scales. Outside spending is most efficient as a brand-introduction and name-ID vehicle. It becomes significantly less efficient as a vote-conversion vehicle against a candidate with established favorability.

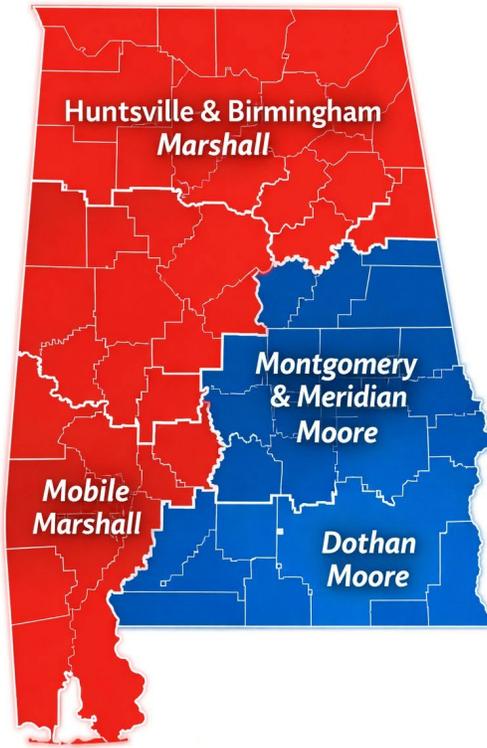
The counterargument Moore’s team would make is that the early spending was foundational — name-ID and brand-building — and the conversion happens when everything goes on television simultaneously. That is a legitimate argument. It is also the argument you make when the numbers aren’t where they should be after seven months of field-clearing expenditure.

Bottom line: Moore has the largest resource advantage in this race by a factor of seven. He is currently leading by 2.1 percentage points — less than the margin of error. The efficiency differential going forward structurally favors Marshall and Hudson, both of whom enter the advertising phase with unspent resources and established favorability in the markets that decide statewide races.

The Geographic Math — Updated March 2026

The February analysis showed Marshall with a structural favorability advantage across the state’s population centers. The March data gives us a sharper picture — one that updates the geographic story in an important way. Net favorability figures below are derived from sub-market crosstabs and weighted by market share.

Alabama Favorability by Media Market



Media Market	% of Primary Vote	Marshall Net Favorability	Moore Net Favorability
Birmingham MM	40%	+22	+9
Huntsville MM	23%	+24	+19
Montgomery/Meridian MM	11%	+18 (avg)	+23 (avg)
Mobile MM	15%	+26	+22
Birmingham + Huntsville + Mobile	78%	+23 avg	+14 avg
Dothan MM	6%	+17	+72
Montgomery/Meridian MM	11%	-2	+23
Dothan + Montgomery/Meridian	17%	+8 avg	+48 avg

Moore’s favorability advantages are concentrated in two markets: Dothan (+72 net, 6% of voters) and Montgomery/Meridian (+23 net, 11% of voters) — combined, 17% of the primary electorate. The remaining 78% of likely voters live in markets where Marshall leads or ties on net favorability: Birmingham (+22 Marshall vs. +9 Moore), Huntsville (+24 vs. +19), and Mobile (+26 vs. +22). The Montgomery/Meridian figure is a shift from the picture in February and warrants watching — but even with Moore’s advantage there, his favorable territory represents less than one in five primary voters. His path requires Dothan and Montgomery to perform at historically high margins while he simultaneously closes a double-digit favorability gap in markets representing four in five votes. That is a demanding theory of the race.

Bottom line: Moore’s favorable geography covers 17% of the primary electorate. To win, his endorsement and spending must close double-digit favorability gaps in markets representing the other 78%. The Trump endorsement still has to introduce him to 24.3% of voters who have never heard of him — and then persuade them to prefer him over a candidate they already know and like. That task has not gotten easier since February. It has gotten shorter.

THE ENDORSEMENT EFFECT: Powerful. Not Deterministic.

Political coverage of this primary has treated the Trump endorsement as the closing argument. The crosstabs show it is a powerful opening argument that has entered a different phase of its effectiveness.

Endorsement	More Likely	Less Likely	NET Effect
Generic Trump endorsement (Aug 2025)	59%	12%	+47
Trump → Moore, named (Feb 2026)	43%	15%	+28
Trump → Wahl, named (Feb 2026)	38%	16%	+22
Trump endorsement, generic (Mar 2026)	52%	17%	+34
Britt endorsement, generic (Mar 2026)	45%	18%	+27
Tuberville endorsement, generic (Mar 2026)	46%	23%	+24

The 13-point drop in the NET effect of a Trump endorsement — from +47 (generic, August 2025) to +34 (generic, March 2026) — is not a statement about Trump’s standing with Alabama Republicans. His job approval (82.3%, NET +66) remains extraordinarily high. What the trend reflects is a natural and well-documented phenomenon in primary politics: *early in the cycle, voters respond to the endorser; later in the cycle, they evaluate the candidate bearing the endorsement.* This race is in the second phase. Roughly 31% of voters say the Trump endorsement of Moore makes no difference to their vote. Among that group, Moore must make a candidate-driven argument — on his own terms, in his own voice. The outside spending of others cannot do that work for him.

Bottom line: Endorsements open doors. They do not close races. The gap between the generic endorsement effect and the named endorsement effect confirms that candidate quality, statewide brand, and voter relationships are now the decisive variables. This race is being decided on candidate performance, not on who endorsed whom.

LIEUTENANT GOVERNOR: The Endorsed Candidate's Favorability Is Underwater

If the conventional wisdom about endorsements were correct, the Lieutenant Governor's race would be Exhibit A. **John Wahl**, the Trump-endorsed candidate and current ALGOP Chairman, has a net negative favorability rating — 12.3% favorable, 14.0% unfavorable, NET -1.7 — and stands at 7.0% in the ballot. He trails the non-endorsed **Wes Allen** by 11.7 points despite the full weight of a presidential endorsement. *That is not an anomaly. It is a data point.*

Candidate	Aug 2025	Dec 2025†	Feb 2026	Mar 2026
Wes Allen	28%	18.2%	23%	18.7%
John Wahl (Trump-endorsed)	—	—	6%	7.0%
Rick Pate	12%	7.5%	6%	8.8%
Nicole Wadsworth	—	1.8%	6%	5.3%
Undecided	61%	41.2%	59%	60.2%

†December 2025 data includes AJ McCarron (31.3%), who subsequently withdrew from the race.

Two additional findings deserve attention. First, **Rick Pate** has moved from 6% in February to 8.8% in March — the only candidate in this race showing consistent upward movement. With 60.2% still undecided, he is a genuine factor in the final stretch. Second, **Allen's** dip from 23% (February) to 18.7% (March) warrants watching, though his overall structural position — an 11.7-point lead with established statewide name recognition as sitting Secretary of State — remains strong.

Bottom line: The President's endorsed candidate in the Lieutenant Governor's race has the highest unfavorable rating and the second-lowest ballot number of the four candidates tested. If endorsements automatically decided primaries, that number would look different. It doesn't.

DOWN-BALLOT: Wide-Open Fields

Attorney General: Three candidates are locked in a statistical tie: **Jay Mitchell** at 12.3%, **Katherine Robertson** at 9.8%, and **Pamela Casey** at 9.3%, with 68.5% still undecided. All three sit within the margin of error of each other. The race remains entirely open, and voter contact and earned media will be determinative.

Commissioner of Agriculture: **Christina McInnis** leads for the first time at 9.0%, followed by **Jack Williams** at 8.8% and **Corey Hill** at 7.0%, with 75.2% undecided. McInnis has reversed the August standings when Williams led. Minimal spending in this race means movement can come quickly and cheaply.

THE ECONOMIC ENVIRONMENT: A Pinched Electorate

Alabama Republicans are broadly optimistic about the direction of the state — 58.7% say Alabama is heading in the right direction against just 29.3% who say wrong track, a NET of +29.3. But optimism about direction and anxiety about the household budget are not mutually exclusive. They are, in this electorate, coexisting. And budget anxiety is dominant.

Seventy-eight and a half percent of likely Republican primary voters name an economic issue as the most important problem facing the state — the highest share recorded across any of our four polls. The breakdown tells the story: inflation and cost of living leads at 24.8%, followed by utility

costs (16.0%), insurance costs (10.0%), and economy/jobs (8.7%). When voters are asked specifically about their biggest household cost pressures, groceries and food top the list at 50.2%, followed by utility bills (35.5%), healthcare (28.2%), insurance costs (27.8%), and gas prices (24.5%).

These are not macro-economic abstractions. They are kitchen-table pressures that are felt every week at the checkout line, every month when the power bill arrives, and every renewal cycle when the insurance premium goes up. They cut across ideology — economic concerns are the top issue for 89.2% of moderate Republicans and 76.1% of conservatives alike. They cut across geography. They cut across age and income.

Bottom line: The NET +29.3 on state direction tells you these voters are not in open revolt. They are in a squeeze. The distinction matters enormously for candidates: this is not a referendum election. It is a kitchen-table primary. The voters who decide it are asking a simple question — who actually understands that my groceries cost more, my power bill is higher, and my insurance premium went up again? No candidate in this race has yet answered that question convincingly. That is the opening.

CONCLUSION

Political analysis in Alabama has for too long accepted the conventional wisdom because it is conventional — not because the data supports it. A presidential endorsement and \$6 million in outside spending are significant facts. They are not, by themselves, determinative ones. The crosstabs of four consecutive polls tell a more complicated story: a candidate with structural favorability advantages in markets representing 78% of the electorate, holding his floor without advertising; a race that has tightened into a three-way tie rather than consolidating; and an endorsed candidate in the Lieutenant Governor's race who has a net negative favorability.

I follow the data. If the conventional wisdom is right — if the money and the endorsements have settled these races — the next poll and the election will confirm it. Right now, they haven't. Three candidates are tied within the margin of error. Two of them have significant resources undeployed.

The story those crosstabs are telling is the one worth writing. I'll keep following the numbers wherever they go.

Methodology

A multi-modal approach was employed via live telephone calls and self-administered text messages. The live telephone interviews were conducted by professional interviewers with respondents contacted by both landline phone and cell phone. The text message respondents were sent a personalized invitation to complete the survey on a secure online platform. Interview selection was random, and interviews were stratified by area, race/ethnicity, age, gender, and vote history to correlate with actual voter turnout from previous even-year primary elections. To qualify, participants had to indicate they are likely to vote in the May 2026 Republican Primary.

This poll of 600 likely May 2026 Republican Primary voters has an accuracy of $\pm 4.0\%$ at a 95% confidence interval. The error margin increases for cross-tabulations. Totals may not add up to exactly 100% due to rounding and refusals. FEC fundraising figures are derived from filed reports through Q4/Year-End 2025. Outside spending figures reflect FEC-reported independent expenditures; the \$1.25M Club for Growth figure is based on publicly announced commitments not yet reflected in FEC filings as of the poll date. [The Alabama Poll — www.AlabamaPoll.com](http://www.AlabamaPoll.com)