

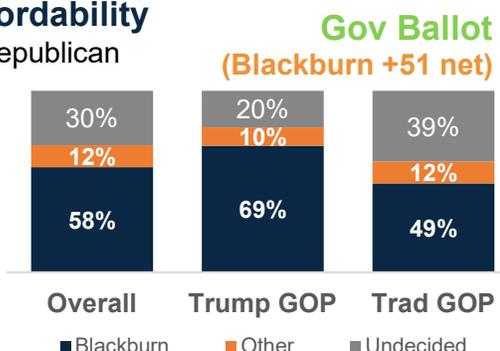
Coronation in Progress: Blackburn Dominates...and Other Issues



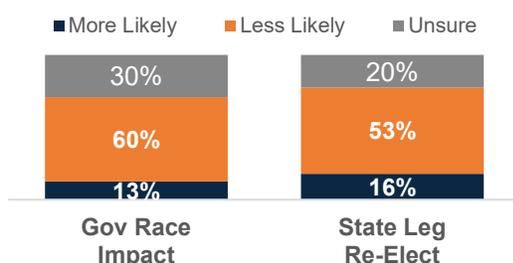
DATE: Monday, March 23, 2026
TO: Interested Parties
FROM: Brent Buchanan, Founder and CEO, Cygnal
RE: How Loyalty to the President's Agenda Defines Tennessee's Primary Race

Blackburn Leads a Primary Defined by Affordability

- Marsha Blackburn already holds 58% of the Republican primary vote (34% definite, 24% probably) – a 51-point lead over John Rose (7%), with 30% undecided and little room for meaningful movement against her.
- Cost of living and inflation is the top issue at 24%, followed by immigration (15%) and jobs/economy (10%). kitchen table economics dominate.



Prescription Drug Access Is a Landmine with a Wrong Vote



- A bill ([SB2040](#)) moving through Nashville has generated significant debate in the statehouse, and this survey makes clear legislators who vote for it face serious risks.
- TrumpRx has 80% support among primary voters, including 61% strongly, and 71% say state government should actively back Trump's drug pricing efforts. This is a load-bearing brand in a Republican primary.

- 60% say they would be less likely to vote for a governor candidate who backed legislation undermining TrumpRx (38% say much less likely) and 53% would vote their state legislator out entirely.
- This is an already-difficult cycle for incumbents: only 16% say they'd re-elect a legislator who voted wrong on this, and 31% are undecided – a pool that moves toward punishment, not safety, once the TrumpRx frame lands.

Emerging Issues Show a Skeptical, Risk-Averse Electorate

- Data centers generate a clear NIMBY gap: 43% support building them statewide (+18 net), but support flips to opposition (-3 net) when the question is whether to build them locally in their own community.
- Voters are wary of AI. 43% expect a negative impact on Tennessee vs. 33% positive, and 66% want the state to regulate AI companies more than it currently does.
- 36% say housing costs are "crushing" their finances; voters prefer first-time homebuyer savings accounts (33%) and repurposing vacant commercial space (26%) over developer incentives (7%).

Issue	Support / Positive	Oppose / Negative	Unsure
Data centers — statewide	43%	25%	32%
Data centers — local area	34%	37%	29%
AI impact on Tennessee	33%	43%	15%
Regulate AI more	66%	6%	12%

Methodology: This probabilistic survey was conducted March 16-17, 2026, with 500 likely 2026 Republican primary election voters. It has a margin of error of ±4.38%. Likely 2026 Republican primary election voters were interviewed via live phones and SMS. This survey was weighted to a likely 2026 Republican primary audience.