

MEMORANDUM

TO: BUDD CAMPAIGN TEAM
FROM: ROB AUTRY
DATE: JANUARY 13, 2022
RE: POSITIVE TRENDS IN McCRORY & JOHN LOCKE FOUNDATION SURVEYS

THE BOTTOM LINE

Two surveys released this week show troubling signs for Pat McCrory. The three-time gubernatorial nominee (and only one-time winner) started the campaign riding the enormous name recognition befitting a career politician. We suspected that his support was a mile wide and an inch deep and this week's surveys appear to confirm our hypothesis. The Civitas Poll by the John Locke Foundation released today and the McCrory campaign survey released yesterday both indicate that **McCrory's unfavorable ratings have doubled** among Republican primary voters since last summer. Our June 2021 survey found Pat McCrory's image rating at 58% favorable – 14% unfavorable. These two surveys both reveal that McCrory's favorables have dropped (52% in the Civitas poll and 46% in the McCrory poll), while McCrory's unfavorables have skyrocketed (28% in the Civitas Poll and 26% in his internal poll). **Since McCrory announced in April, the only McCrory trendlines that have been going up in polls have been the McCrory unfavorable numbers.**

Ted Budd continues to be the candidate best positioned to win. Ted Budd's favorables have increased — he's viewed favorably by 41% in the Civitas poll and by 36% in the McCrory poll (up from 28% favorable in our June 2021 survey) — while his unfavorables remain extremely low (9% in the Civitas poll, 6% in the McCrory poll, and 4% in our June 2021 survey). Budd should further benefit from President Trump's endorsement, as Trump remains extremely popular with Republican primary voters (80% favorable in both new polls).

The ballot test in these recent polls shows the momentum is clearly on Budd's side.

McCrory's own internal poll shows him losing a third of his ballot share since last summer (45% in June 2021 to 30% today) and losing 10 points since his last campaign poll in late October 2021 (40%). The Civitas Poll shows him at an even more troubling 24%.

McCrory's lead has also evaporated over the past nine months. The first McCrory campaign poll had his lead at 35 points (48% McCrory – 13% Budd). The McCrory poll in October 2021 had McCrory's lead down to 15 points (40% – 25%). And now, their latest survey has it down to 9 points (30% – 21%). Meanwhile, the Civitas poll results indicate this race is fully within the margin of error at 5 points.



When primary voters are asked about a head-to-head matchup, they give Ted Budd a 34% – 33% lead over Pat McCrory.

Ted Budd has a much more reliable coalition. I'm a bit surprised that the McCrory campaign publicly revealed this last part, but if you look at the actual data results they released, not just the memo, McCrory's own survey indicates intense weakness for McCrory among Republicans, especially when you factor in that Republicans have chosen him to be their standard bearer on three separate occasions.

The McCrory survey reveals that even with a huge name ID advantage, McCrory has only a tiny advantage among Conservatives (28% PM – 25% TB), Very Conservatives (29% PM – 27% TB), High Interest Voters (29% PM – 25% TB), and Seniors (26% PM – 24% TB).

I'm most surprised that the McCrory campaign revealed:

- Among Likely Voters who have heard of both McCrory and Budd, we lead on the ballot by five points (26% PM – 31% TB).
- Among Likely Voters who have favorable views of both McCrory and Budd, we lead on the ballot by three points (35% PM – 38% TB).
- **Among Likely Voters who have an opinion of both candidates, we lead on the ballot by 19 points (25% PM – 44% TB).**