



MEMORANDUM

TO: INTERESTED PARTIES
FROM: ROB AUTRY
DATE: MARCH 11, 2022
**RE: KEY FINDINGS FROM SURVEY OF LIKELY REPUBLICAN PRIMARY VOTERS
ON THE U.S. SENATE CONTEST IN NORTH CAROLINA**

Meeting Street Insights conducted a live interviewer telephone survey of likely Republican primary voters in North Carolina February 26 – March 1, 2022. A total of 500 primary voters statewide were interviewed using a mix of cell phone and landline interviewing and the survey has a margin of error of $\pm$ 4.38 percentage points.

THE BIG PICTURE

Former Governor Pat McCrory continues heading in the wrong direction as his image and ballot numbers have taken a significant hit over the past nine months. Last June, McCrory had a 26-point ballot lead but that has now dwindled to just six. That's the good news for McCrory. The bad news is, when you look at the voter groups that matter most in a Republican primary contest – Base Republicans, Very Conservatives, Evangelicals, Trump Supporters, Seniors, and Most Interested in the Election – this survey data indicates Ted Budd is the candidate with the momentum and, in some cases, already taking the lead. And, yes, President Donald Trump remains, by far, the most popular figure for Republican primary voters in North Carolina.

KEY FINDINGS

#1 / McCrory's favorables have dropped 15 points and his unfavorables have climbed 11 points since June 2021. McCrory has a 43% favorable – 25% unfavorable image rating, with a net favorable image rating of only +18 compared with +44 net fav in June (June: 58% favorable – 14% unfavorable). This confirms McCrory's own campaign poll released in January that showed his image at 46% favorable – 26% unfavorable.

#2 / Ted Budd has the best net favorable image rating of any of the Republicans running for U.S. Senate in North Carolina. Budd's image now stands at 38% favorable – 8% unfavorable (+30 net favorable). Mark Walker is at 28% favorable – 3% unfavorable (+25 net favorable) and Marjorie Eastman is at 7% favorable – 4% unfavorable (+3 net favorable).



#3 / McCrory no longer has a statistically significant lead on the ballot test. The Republican primary ballot test shows McCrory (31%) and Budd (25%) within striking distance of each other, with Walker at 16% and Eastman at 4% and 23% undecided. Since June, McCrory ballot support has fallen 14 points, from 45% to 31%, while Budd's has increased six points from 19% to 25% and Walker went from 12% to 16% since June 2021.

- Among the voter groups that matter most in Republican primaries, this race has evolved into a two-candidate contest.
 - Among Base Republicans (the 59% who self-identify as a “Strong Republican”), the race is dead-even at 29% McCrory – 29% Budd (June: 45% McCrory – 20% Budd). The race is also tied among Base Republicans who are ages 65+ (30% McCrory – 30% Budd).
 - The primary ballot is also a coin toss among Base Republicans who are very conservative ideologically (28% McCrory – 31% Budd) and Base Republicans who are evangelicals (31% McCrory – 29% Budd).
 - Budd's ballot numbers are strong among Base Republicans who are Trump supporters (23% McCrory – 35% Budd) and Base Republicans who are very interested in the primary election (those who rate their interest as either an 8, 9, or 10 on a one-to-ten interest scale: 25% McCrory – 31% Budd).
- Another key indicator of momentum is the ballot among voters who already have a defined opinion of the candidates. Fully 39% of primary voters have an opinion of both McCrory and Budd and those Republicans are voting for Budd over McCrory by 21 points (46% Budd – 25% McCrory – 20% Walker – 3% Eastman – 6% undecided). Again, this confirms the McCrory January survey that indicated almost the same with the Budd advantage at 20 points (44% to 24%).

#4 / The Budd Campaign has a lot of room to grow thanks to President Donald Trump's endorsement . Only 30% of primary voters are aware President Trump endorsed Budd. When we asked Republican primary voters for whom would they vote if they knew “President Donald Trump has endorsed and is supporting Ted Budd for U.S. Senate,” Ted Budd surges to a 27-point lead over McCrory and a 40-point lead over Walker (50% Budd – 23% McCrory – 10% Walker – 4% Eastman – 13% undecided).

- The Trump endorsement message point hurts Mark Walker almost as much as it hurts Pat McCrory. After learning that Trump is backing Budd, Walker's ballot support drops six points (from 16% to 10%), while McCrory's drops eight points (from 31% to 23%).
- Donald Trump is still the most popular figure among Republican primary voters – and it's not even close. 85% of likely primary voters view him favorably, and only 12% are unfavorable.