

M E E T   N G  
S   R E E T



# KEY FINDINGS FROM A **PRE-ELECTION DAY** SURVEY IN **NORTH CAROLINA**



KEY FINDINGS FROM AN OCTOBER 24–27, 2020,  
SURVEY OF 600 REGISTERED VOTERS

# METHODOLOGY

Meeting Street Insights is pleased to present the key findings from a survey of registered voters in North Carolina.

Interviews were completed October 24–27, 2020, among N=600 registered voters with a mix of cell phone and landline interviewing.

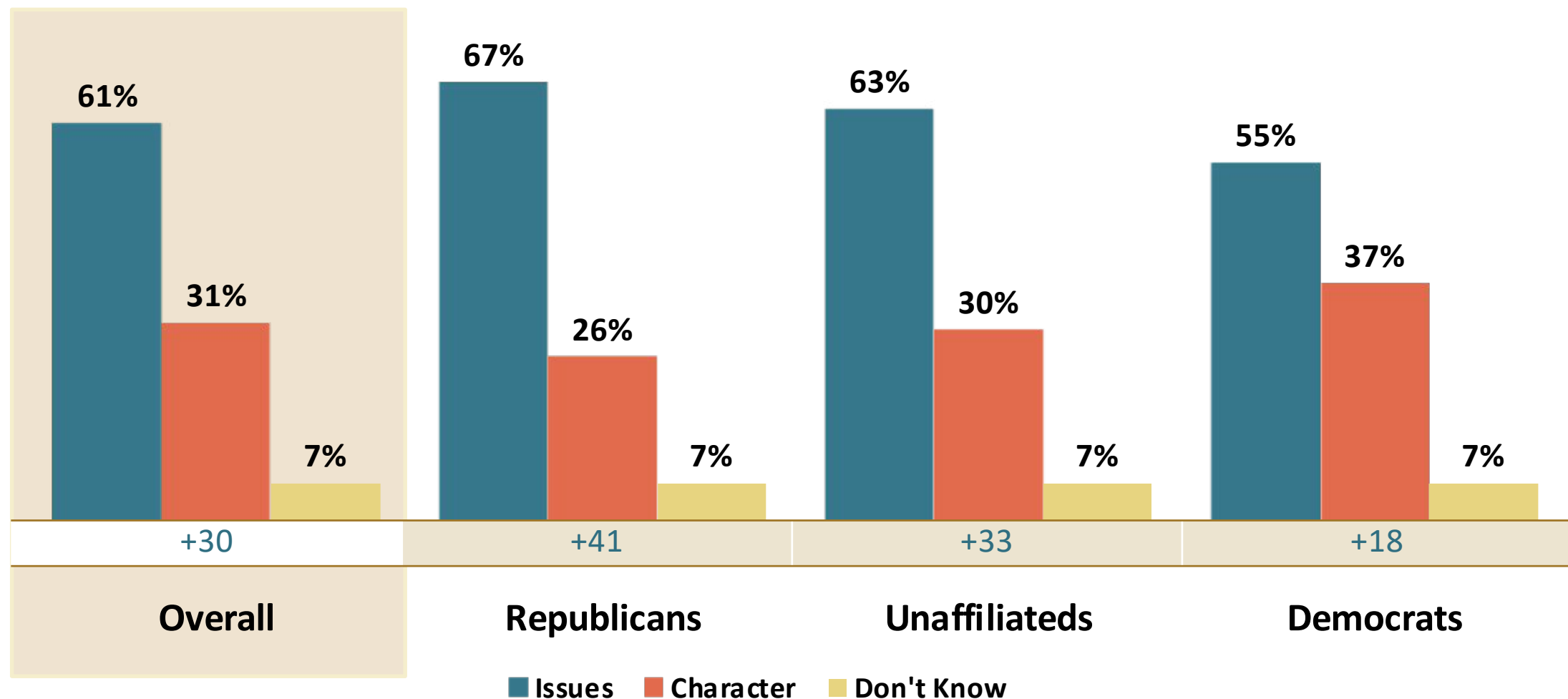
The margin of error for a sample size of N=600 is  $\pm 4.0\%$ .



# THE ISSUES DEFINING THE 2020 ELECTION

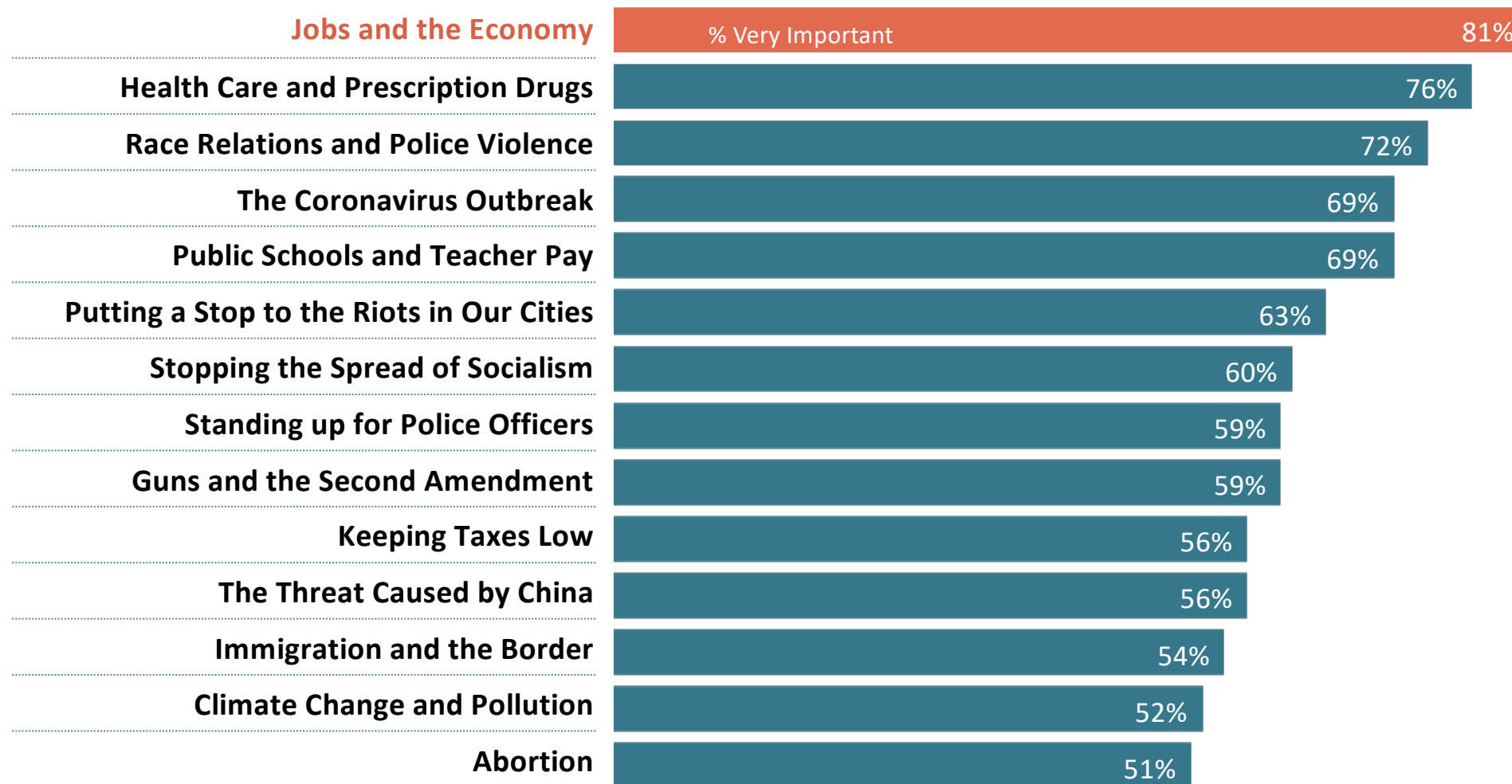
## NC voters tell us that issue positions matter more than candidate character.

“While some people vote based on the issues, others vote more based on a candidate’s character and personal qualities. Which is more important to you in deciding who to vote for—a candidate’s positions on the issues OR a candidate’s character and personal qualities?”



# Economic concerns top the list of election issues, but there are quite a few others that aren't far behind in voter importance.

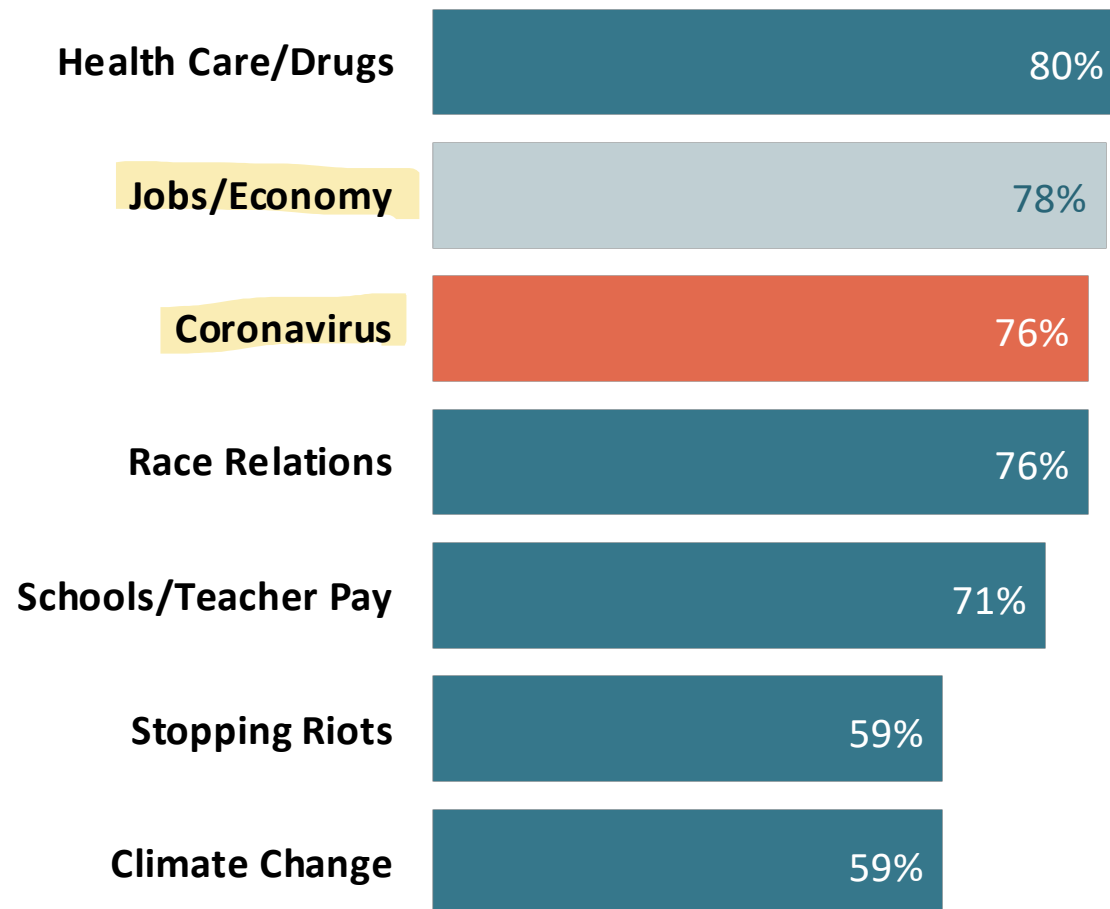
“Next, we’re going to look at a series of different issues and, after I read each one, please tell me how important that issue is in deciding which candidate to vote for in the election.”



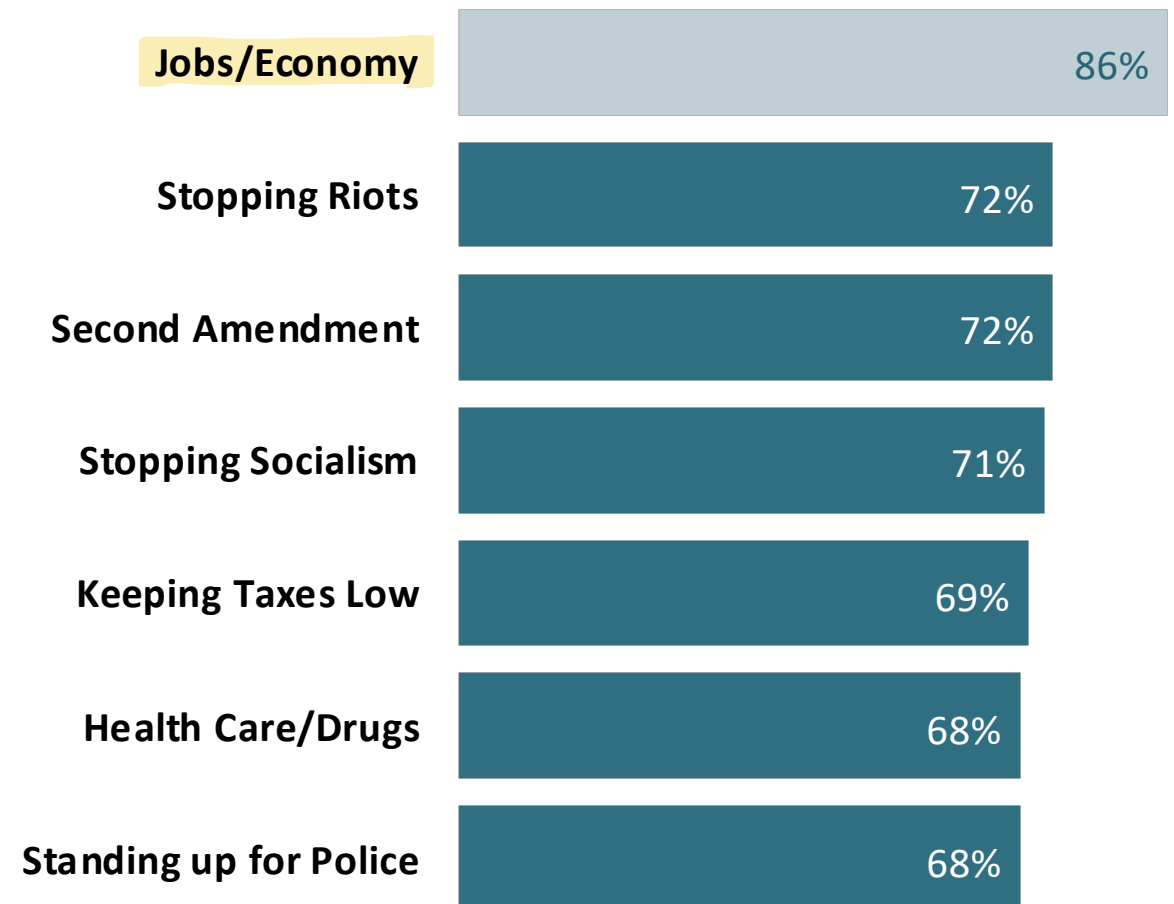
# Those who have yet to cast their ballots have a much different key issue list than those who have already voted.

% Very Important Issue

## Those Who Already Voted

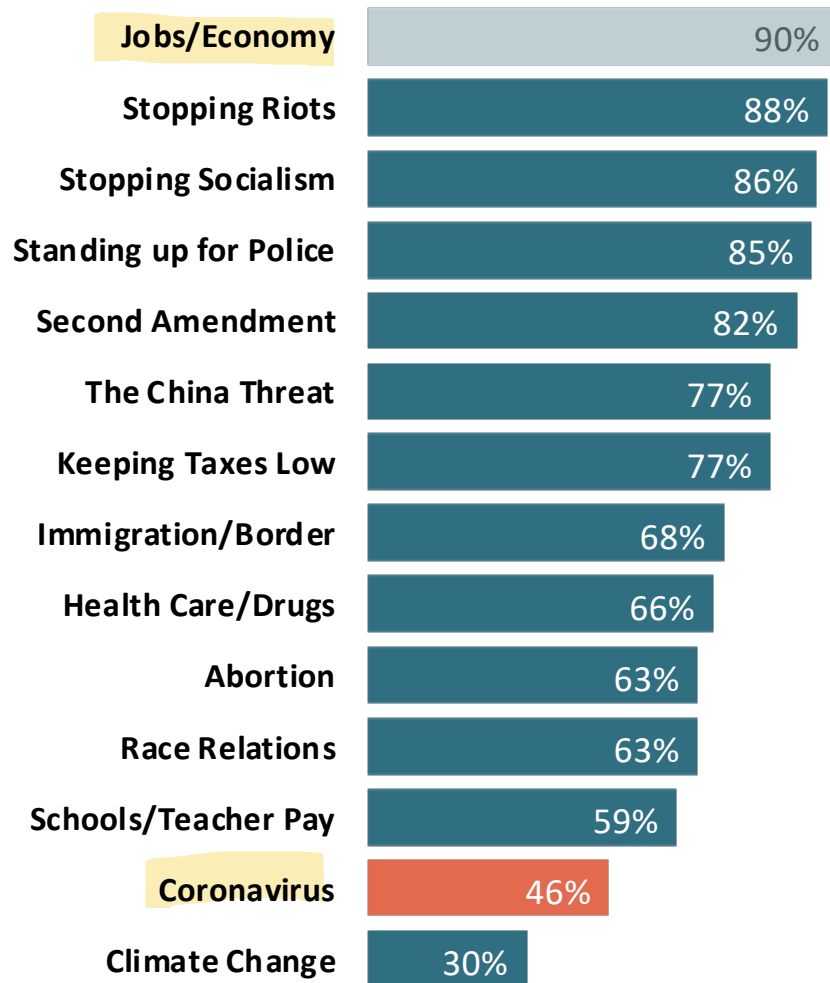


## Those Voting On Election Day

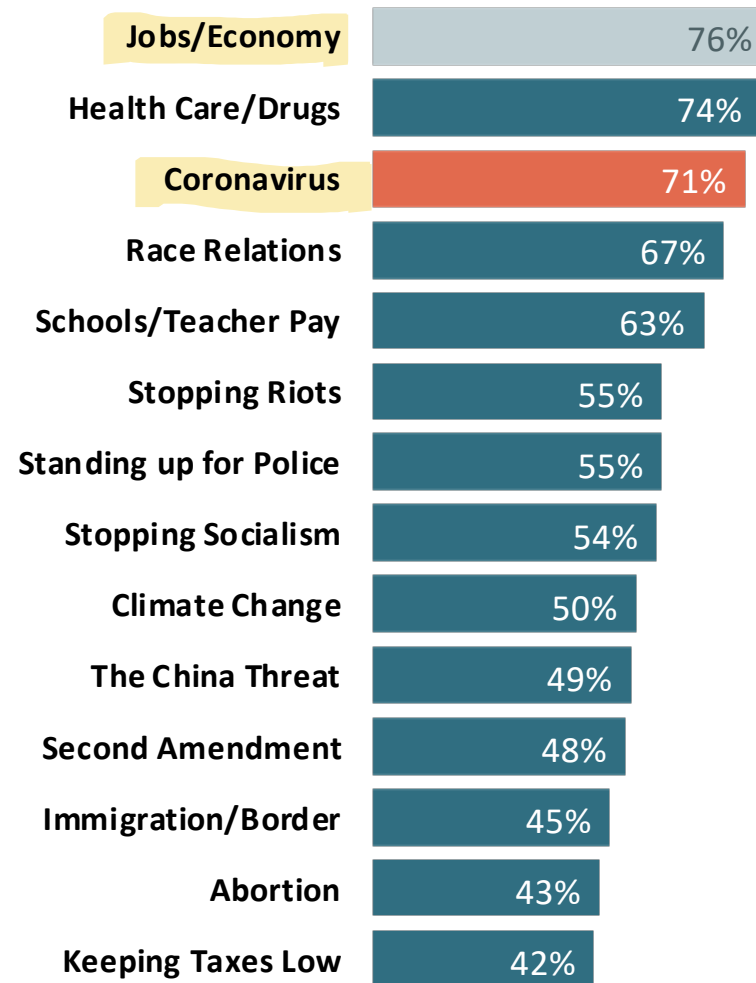


# Unaffiliateds and Democrats have similar issue priorities, while Republicans are noticeable focused on a different issue set.

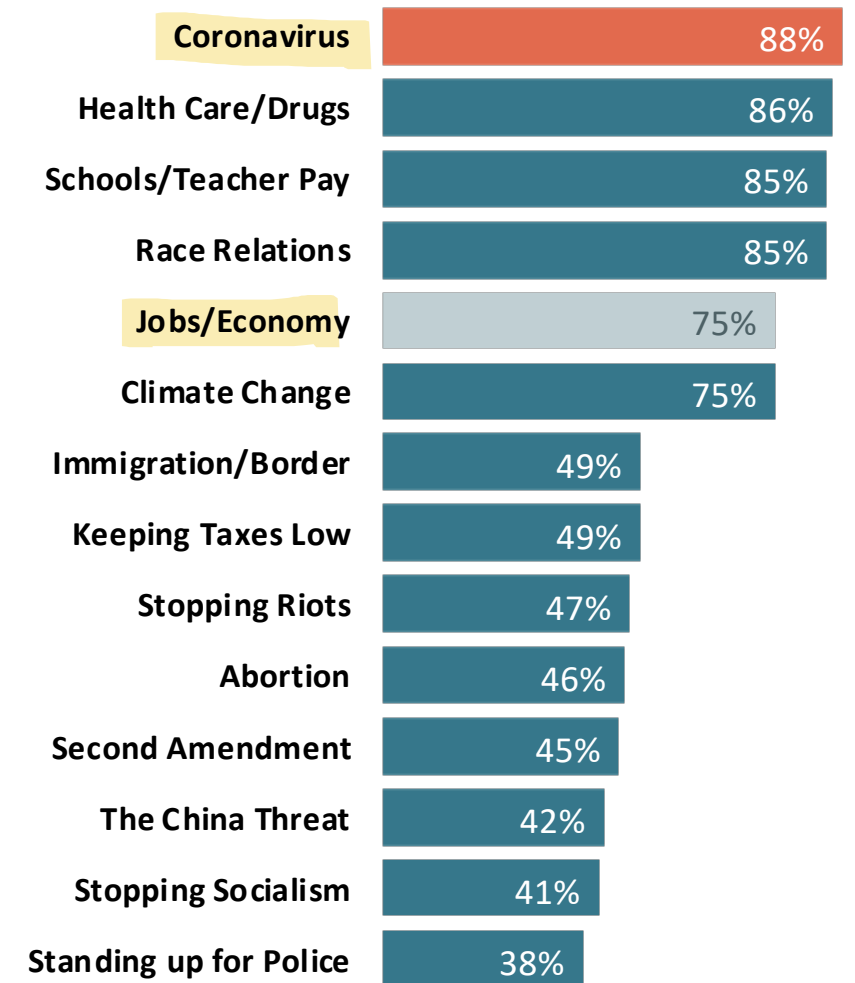
## Among Republicans



## Among Unaffiliateds

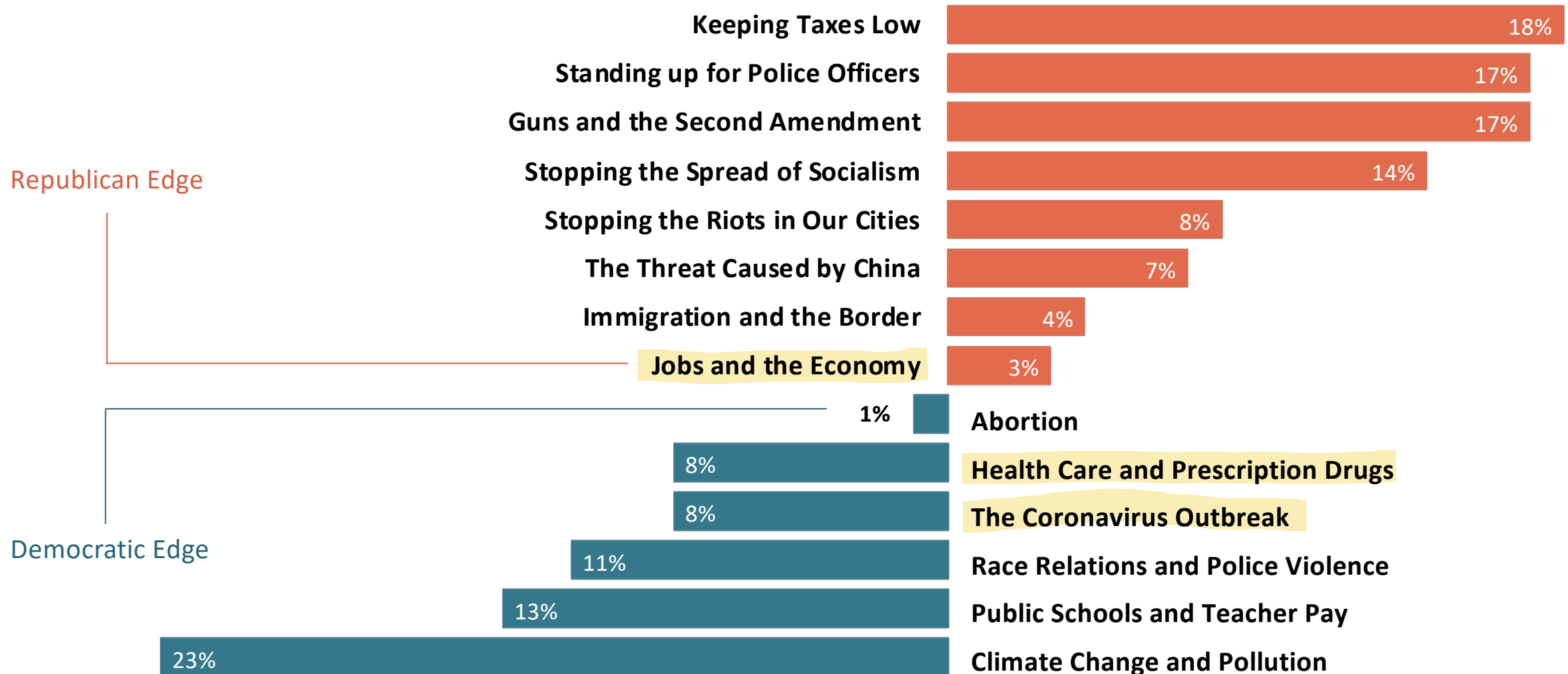


## Among Democrats



# There are clear dividing lines on what issues voters trust Republicans and Democrats more. Republicans have the slightest of edges on the economy.

“Please tell me which political party, the Republicans or the Democrats, you trust more to handle each issue.”



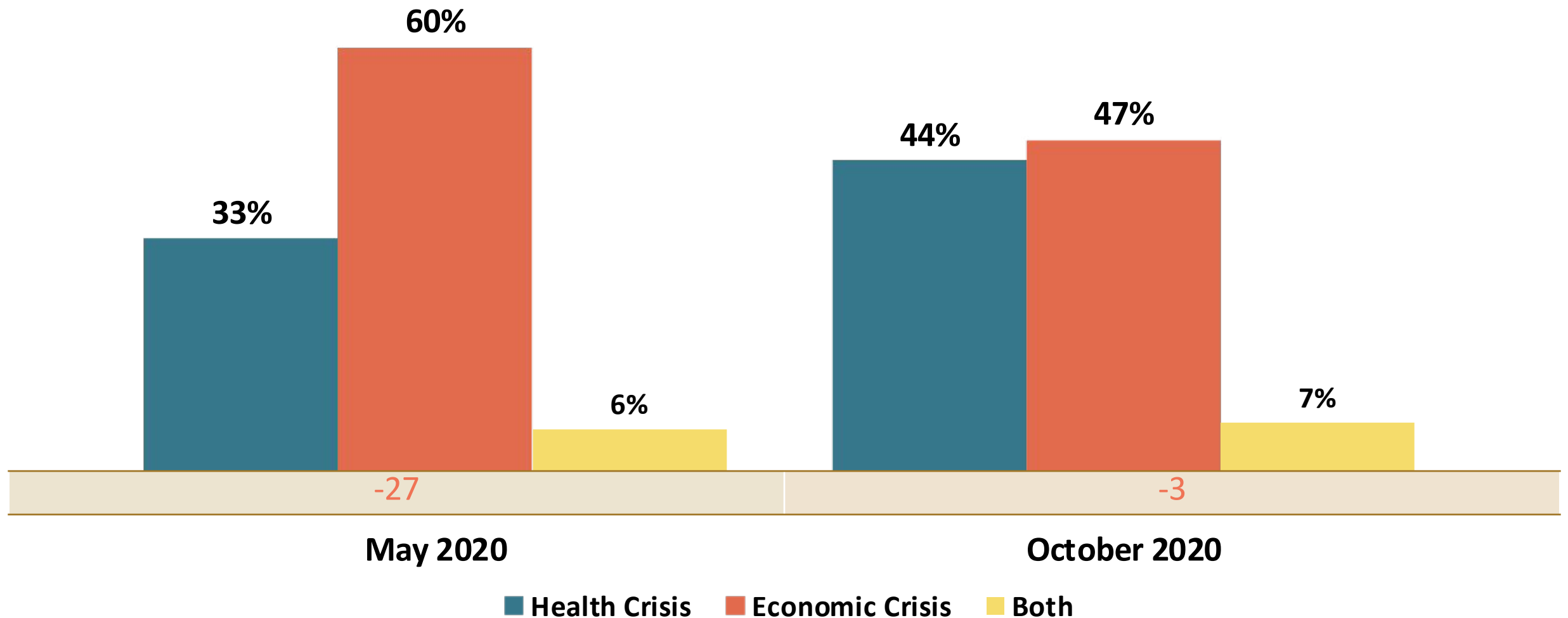




# THE IMPACT OF THE PANDEMIC

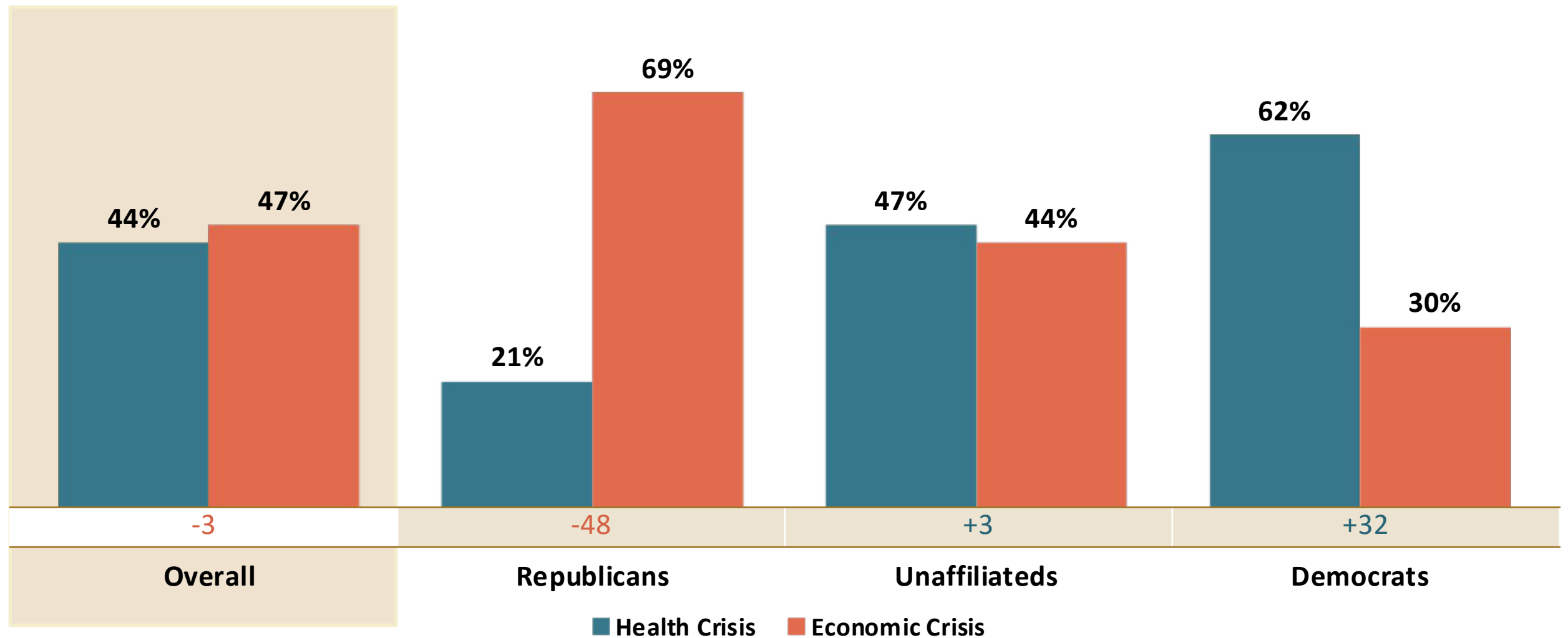
## The Covid-19 debate has shifted more to the public health side since May.

“If you had to pick only one, would you say the Coronavirus here in North Carolina has created more of a health crisis or an economic crisis?”



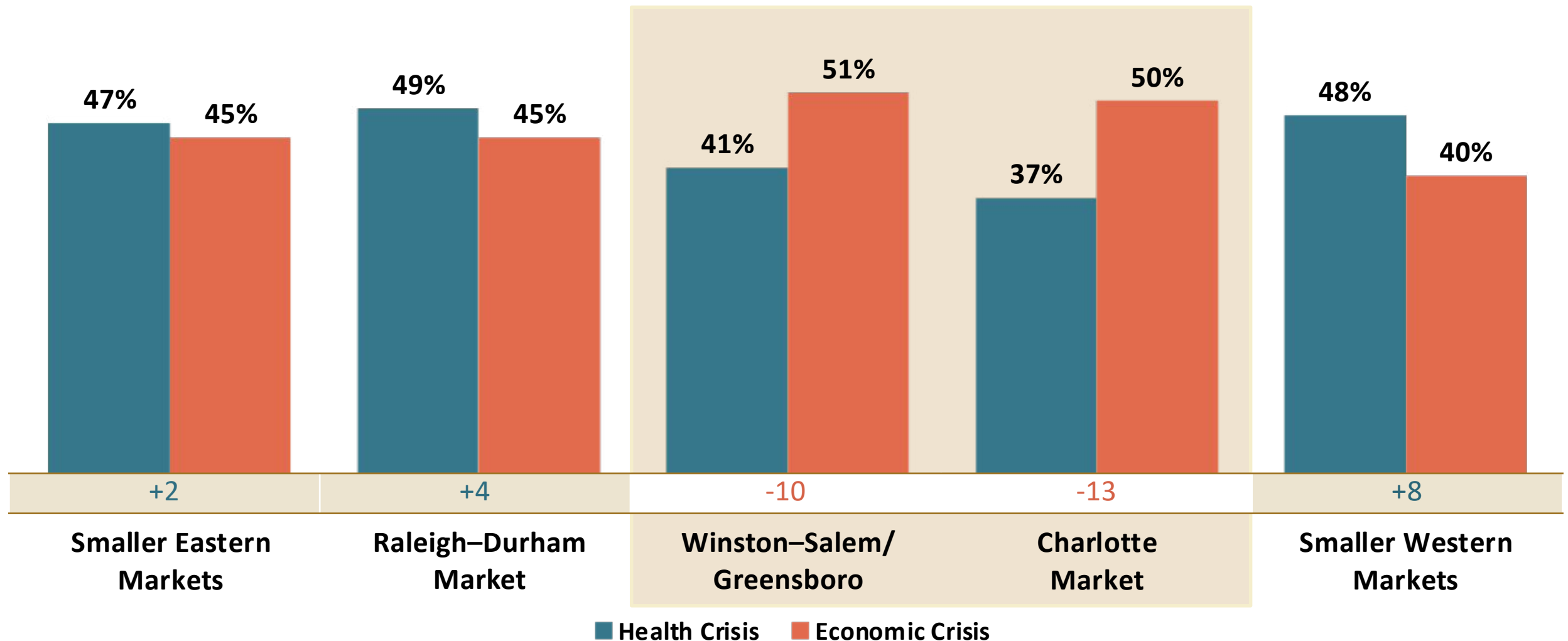
As we saw in May, this issue has a significant partisan flavor to it.

Coronavirus is a Health Crisis v. Economic Crisis by Party Registration



## Triad and Charlotte voters are more focused on the economic impact.

Coronavirus is a Health Crisis v. Economic Crisis by Media Market



# Two out of three voters know someone who has been infected with Covid-19 and **one in six know of someone who didn't recover from it.**

“Have you or someone you know personally in North Carolina been infected with the Coronavirus?”

	May 2020	October 2020
Yes, I myself have been infected with the Coronavirus	1%	5%
Yes, some I know personally in North Carolina has been infected with the Coronavirus	31%	60%
No, I don't know anyone who has been infected with the Coronavirus	67%	36%

**Know  
Someone  
Infected**

**May: 32%**

**Now: 65%**

“And, did you or the person you know with Coronavirus make a healthy recovery or not?”

**8%**

**Did Not Recover**

**16%**

**Did Not Recover**

## Meanwhile, the personal economic impact hasn't changed much since May.

“Have you, a family member living in your household, or someone you know been laid off or lost a job permanently, or had your hours or pay reduced as a result of the Coronavirus outbreak, or not?”

	May 2020	October 2020
I Have Been Laid Off / Had Hours Cut	24%	22%
Family Member Has Been Laid Off / Hours Cut	27%	25%
I Know Someone Laid Off / Hours Cut	25%	20%
Do Not Know Anyone Laid Off / Hours Cut	37%	42%

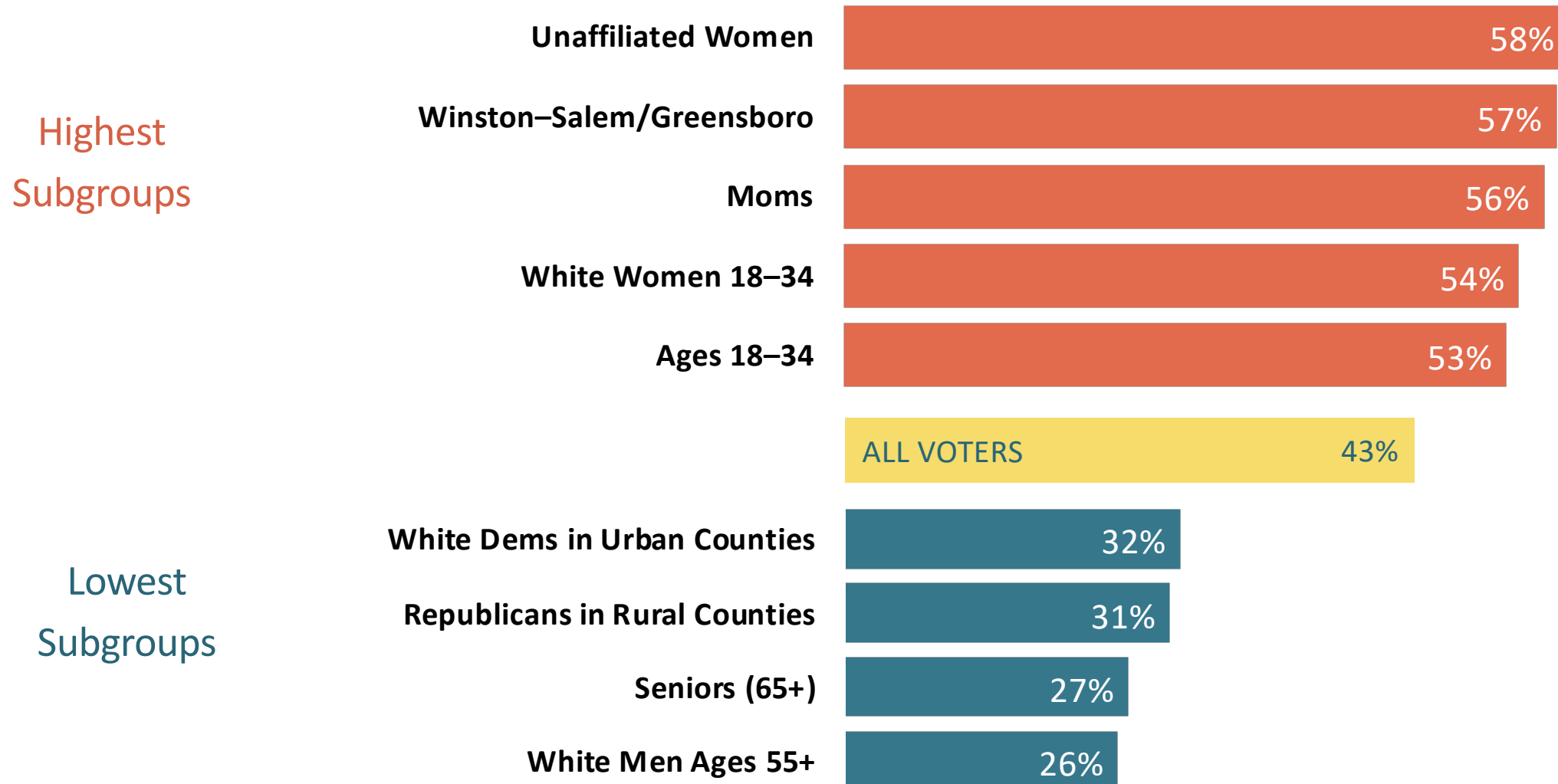
### Household Impacted

May: 44%

Now: 43%

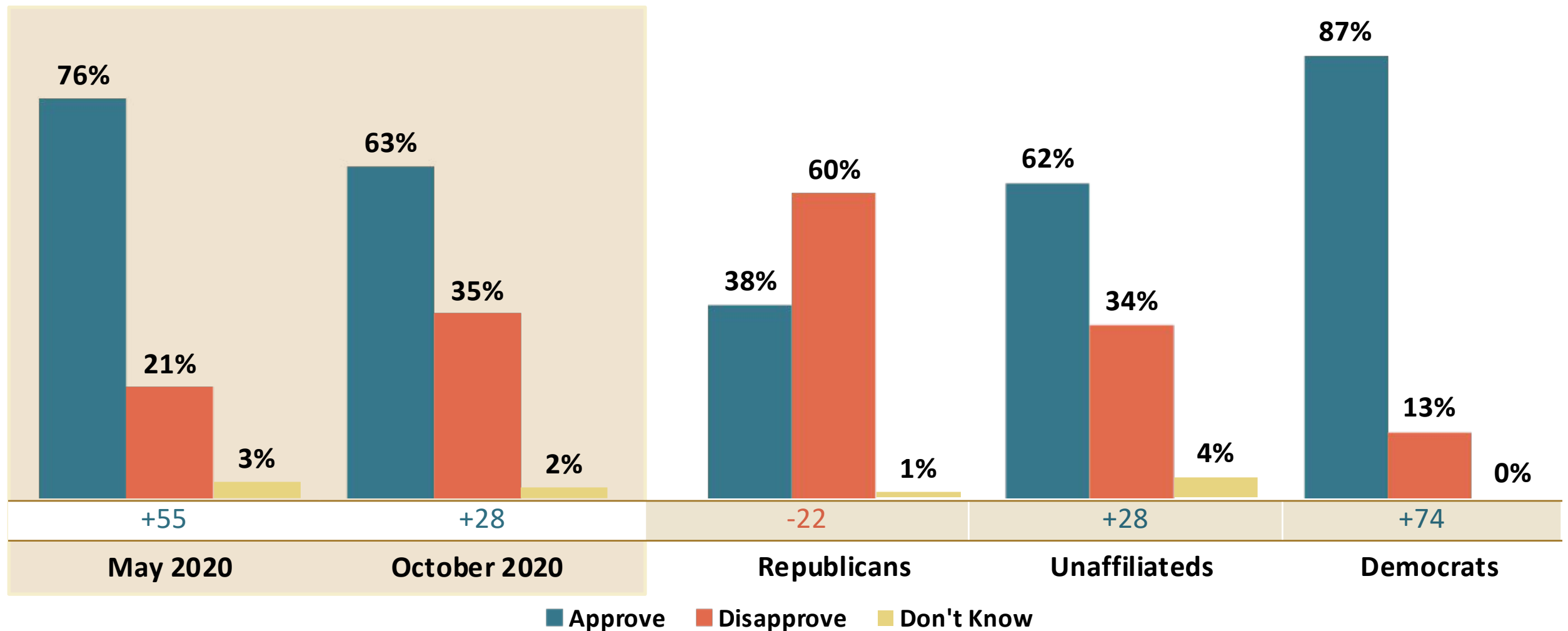
# Women, younger voters, and those in the Triad are more likely to say they have been economically impacted by the pandemic.

% Who Have Experienced Loss In Household Income Because Of Covid-19



# The Governor's approval rating on Covid-19 is down, but still quite positive.

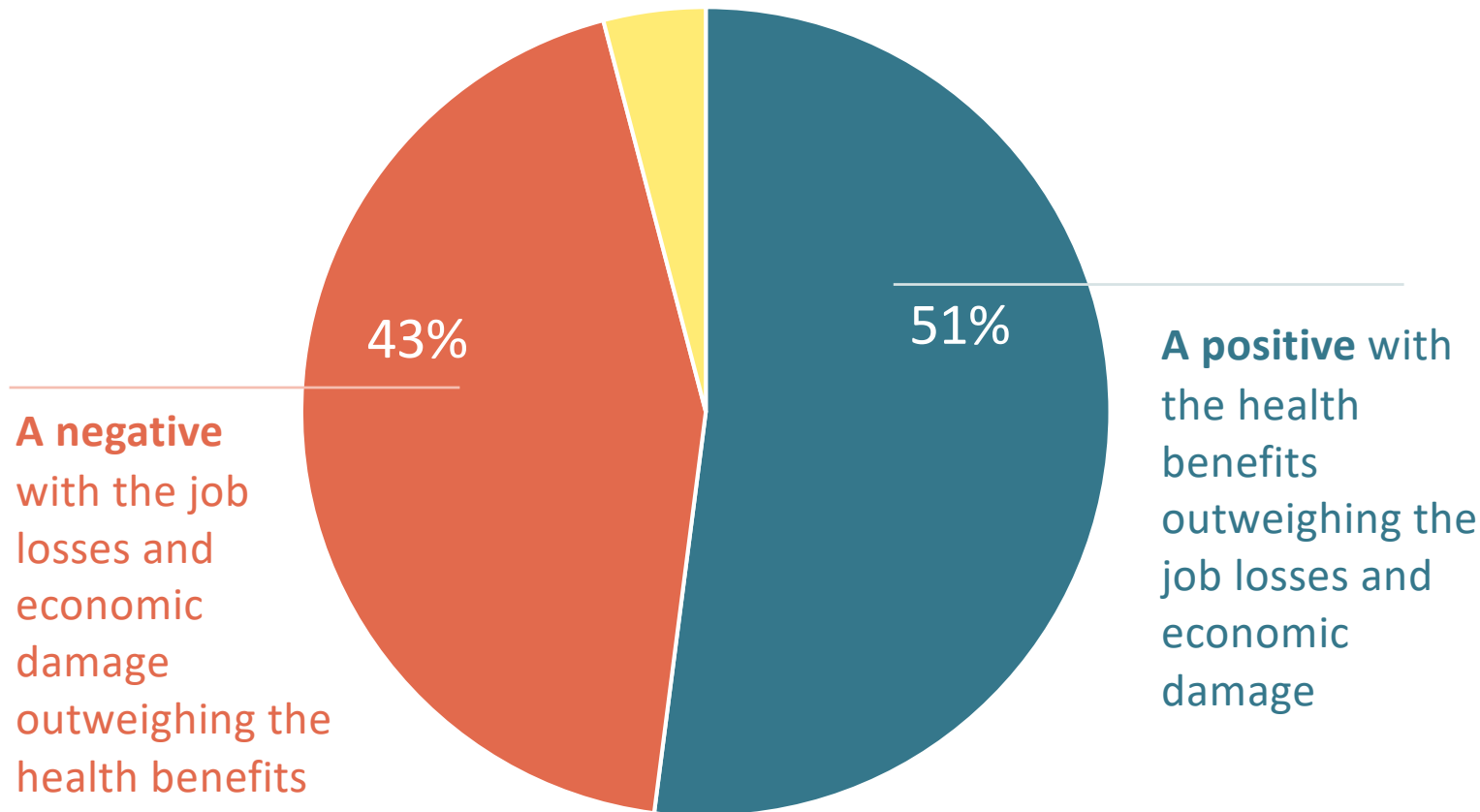
“And, do you approve or disapprove of the way Governor Cooper has handled the Coronavirus outbreak here in North Carolina?”





# Slightly more NC voters believe the shutdown orders were a positive thing, especially Unaffiliateds, Democrats, and African Americans.

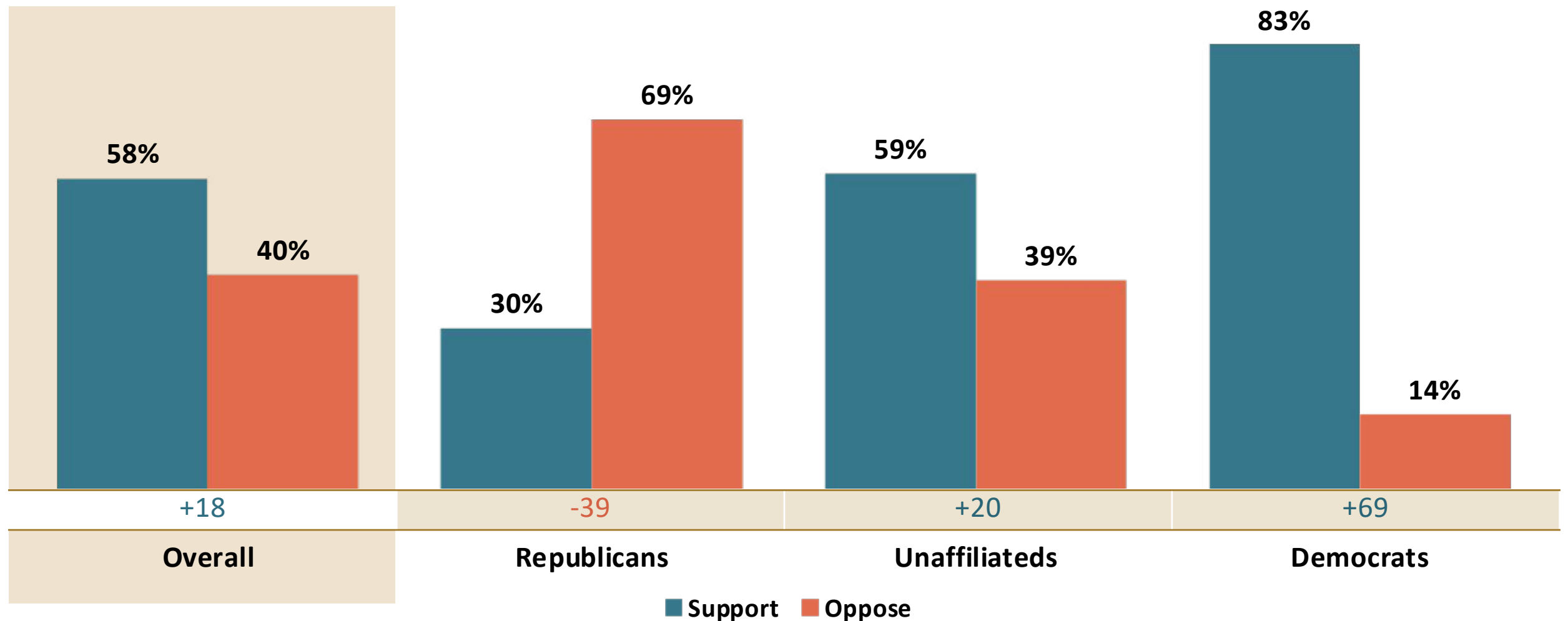
“And, based on what you know, when you think about the shutdown orders that were implemented in North Carolina earlier this year, which of the following statements do you tend to agree with more?” Overall the shutdown orders were...



	Positive	Negative
Republicans	30%	64%
Unaffiliateds	57%	38%
Democrats	65%	28%
White Men	43%	51%
White Women	49%	44%
African Americans	68%	28%

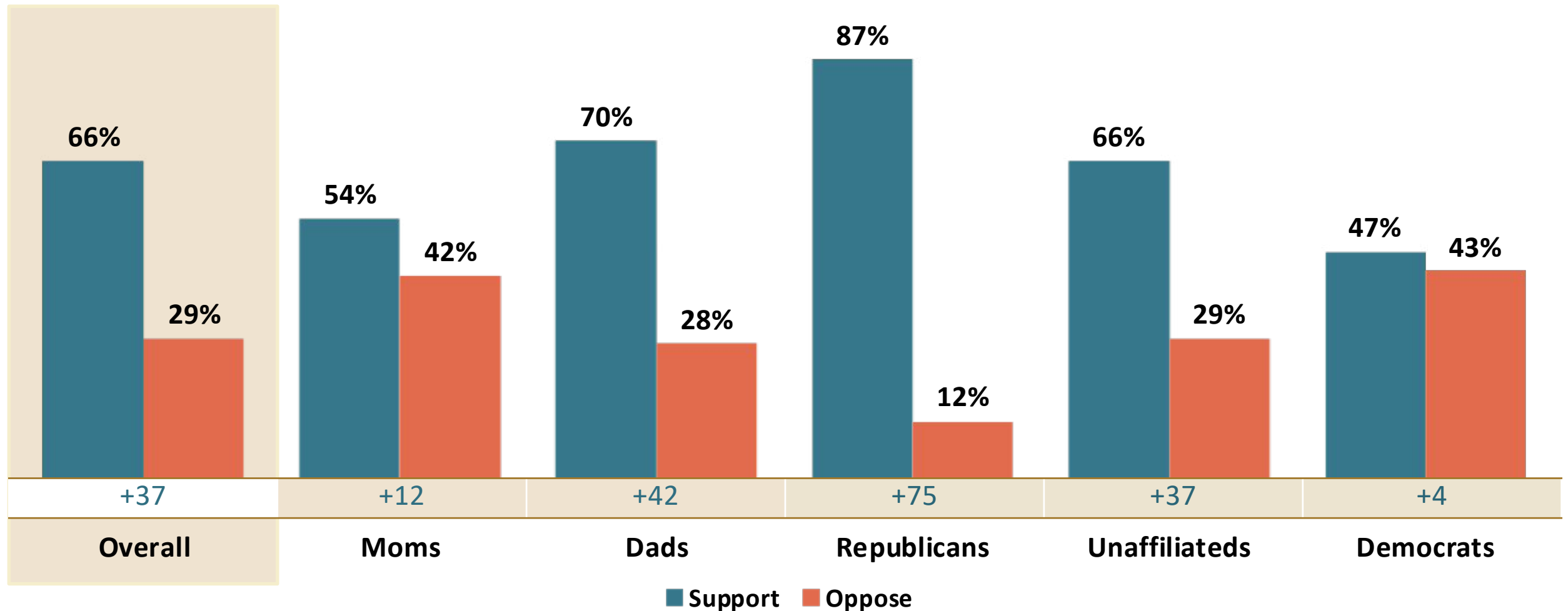
## A majority of voters also say they would support new shutdown orders if Covid-19 cases continue to increase in North Carolina.

“If the number of COVID-19 cases here in North Carolina continues to increase, would you SUPPORT or OPPOSE Governor Cooper putting in place new shutdown orders?”



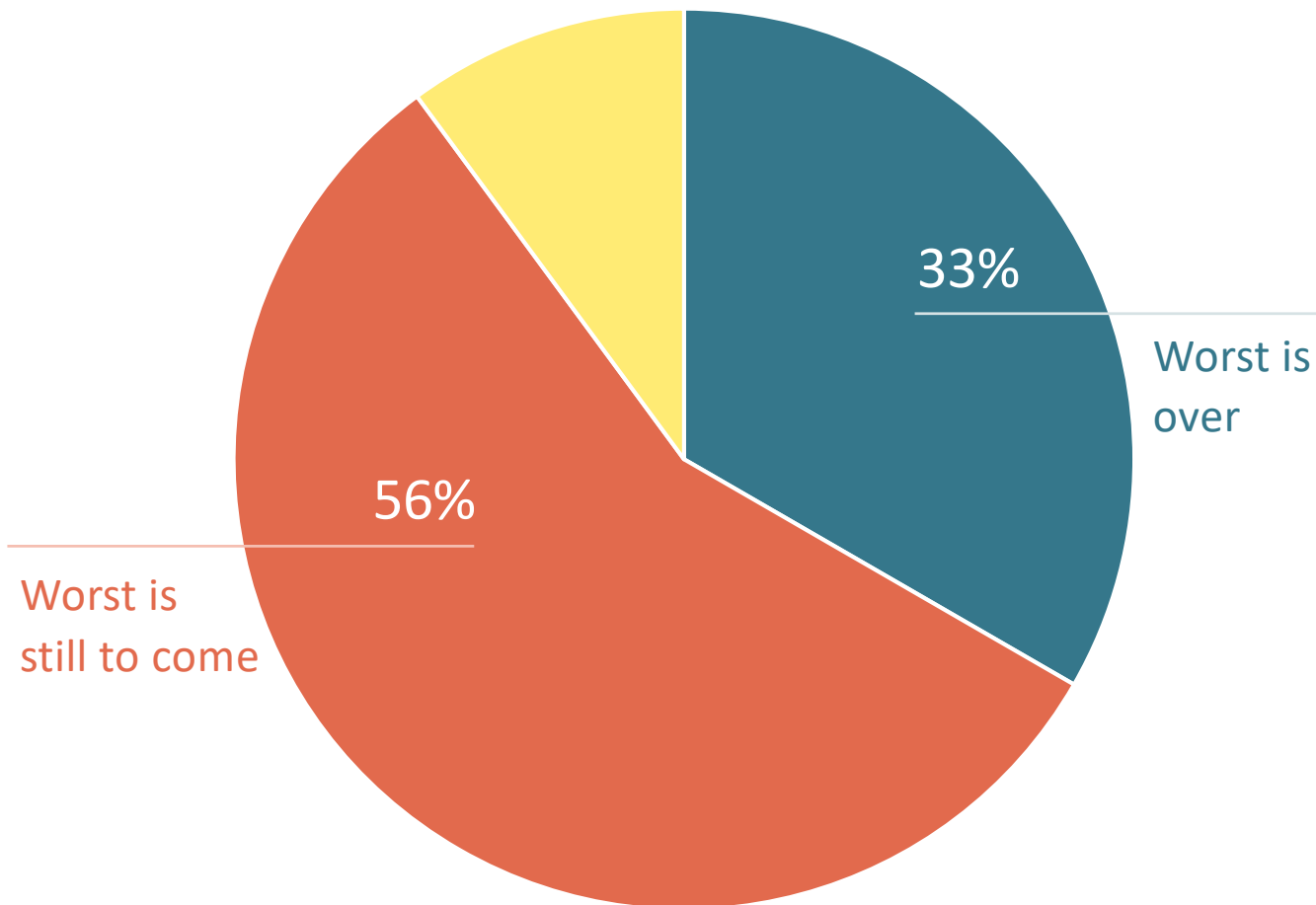
## Two-thirds of voters support reopening schools for in-person instruction, with Dads and Republicans showing the most support for this.

“Over the next few months, school systems across the state will begin the process of reopening for in-person instruction. Do you SUPPORT or OPPOSE the decision to reopen schools for in-person instruction?”



# Most voters also believe the worst is yet to come (except Republicans).

“Thinking about the coronavirus pandemic, do you think that the worst of the coronavirus is over, or do you think the worst of the coronavirus pandemic is still to come?”



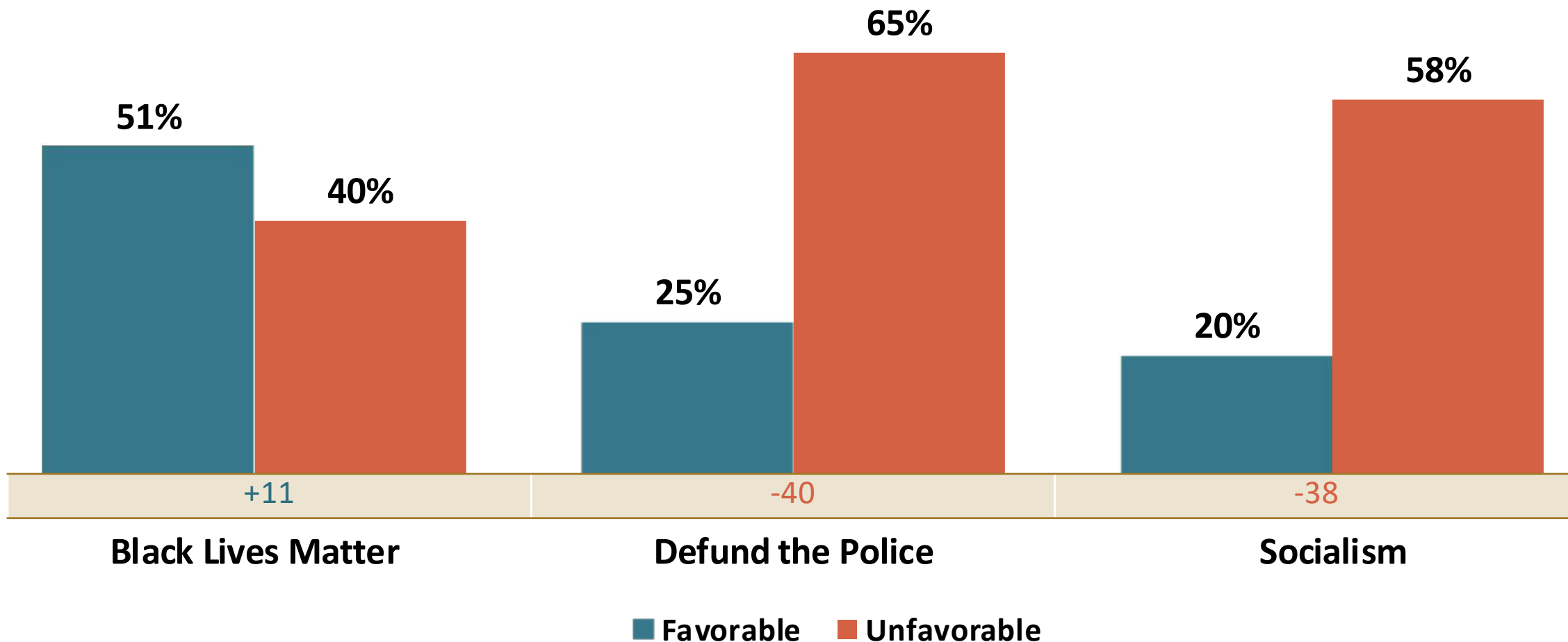
	Worst is Over	Worst is Still to Come
<b>Republicans</b>	<b>59%</b>	<b>28%</b>
<b>Unaffiliateds</b>	<b>31%</b>	<b>60%</b>
<b>Democrats</b>	<b>13%</b>	<b>79%</b>
<b>White Men</b>	<b>42%</b>	<b>45%</b>
<b>White Women</b>	<b>38%</b>	<b>52%</b>
<b>African Americans</b>	<b>14%</b>	<b>80%</b>
<b>Smaller Eastern Markets</b>	<b>36%</b>	<b>47%</b>
<b>Raleigh–Durham Market</b>	<b>29%</b>	<b>64%</b>
<b>Winston–Salem/Greensboro</b>	<b>34%</b>	<b>56%</b>
<b>Charlotte Media Market</b>	<b>35%</b>	<b>52%</b>
<b>Smaller Western Markets</b>	<b>37%</b>	<b>57%</b>
<b>Seniors (Ages 65+)</b>	<b>26%</b>	<b>63%</b>



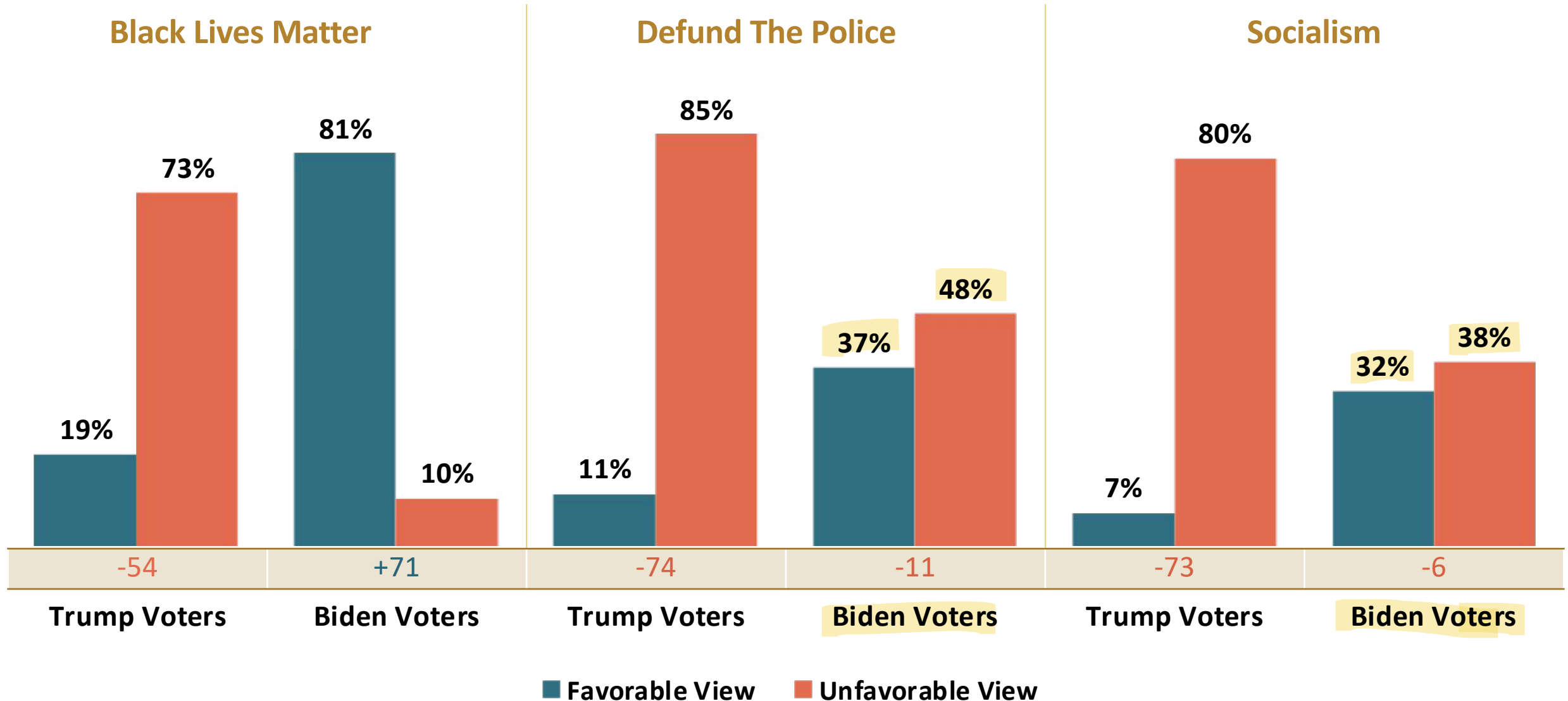
**OH WAIT, WE HAVE  
MORE 2020 ISSUES...**

## Most NC voters have a favorable view of BLM, but most do not view defunding the police and socialism favorably.

“For each one, please tell me, first whether you’ve heard of them; then, if so, please tell me whether you have a favorable or unfavorable impression of them. If I name one you don’t know too much about, just tell me and we’ll go on to the next one .”



# Biden supporters are somewhat conflicted on defunding the police and socialism, Trump supporters clearly are not.



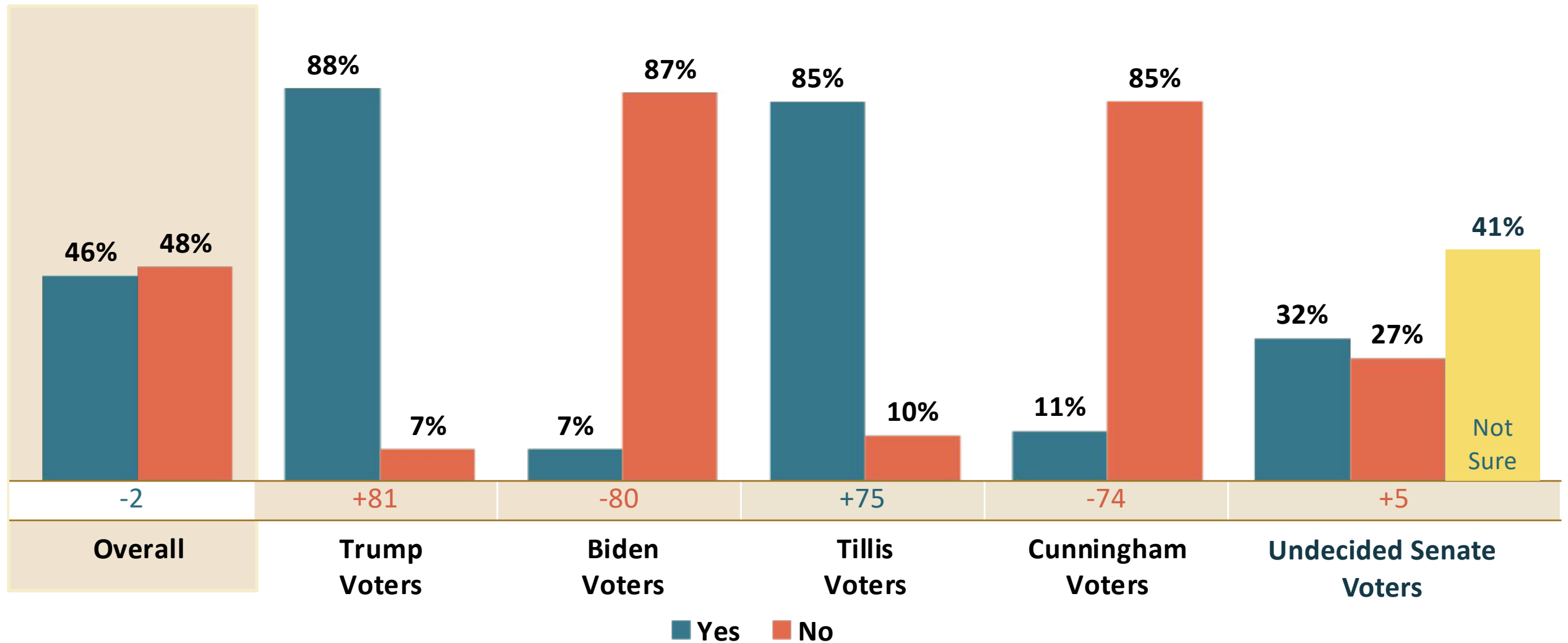
## The group most favorable towards defunding the police and socialism is...

	Black Lives Matter		Defund the Police		Socialism	
	Fav	Unfav	Fav	Unfav	Fav	Unfav
White Men Ages 18–34	48%	37%	30%	65%	22%	61%
White Men Ages 35–54	37%	58%	13%	87%	15%	70%
White Men Ages 55+	34%	61%	9%	81%	9%	73%
<b>White Women Ages 18–34</b>	<b>70%</b>	<b>14%</b>	<b>58%</b>	<b>35%</b>	<b>46%</b>	<b>37%</b>
White Women Ages 35–54	50%	36%	18%	59%	19%	51%
White Women Ages 55+	50%	45%	22%	70%	25%	61%
African Americans	73%	19%	39%	48%	21%	43%



# Voters (including up-for-grab voters) are evenly split on the confirmation of Justice Barrett to the US Supreme Court.

“Do you believe that Amy Coney Barrett should be confirmed to serve as a Justice on the United States Supreme Court, or not?”

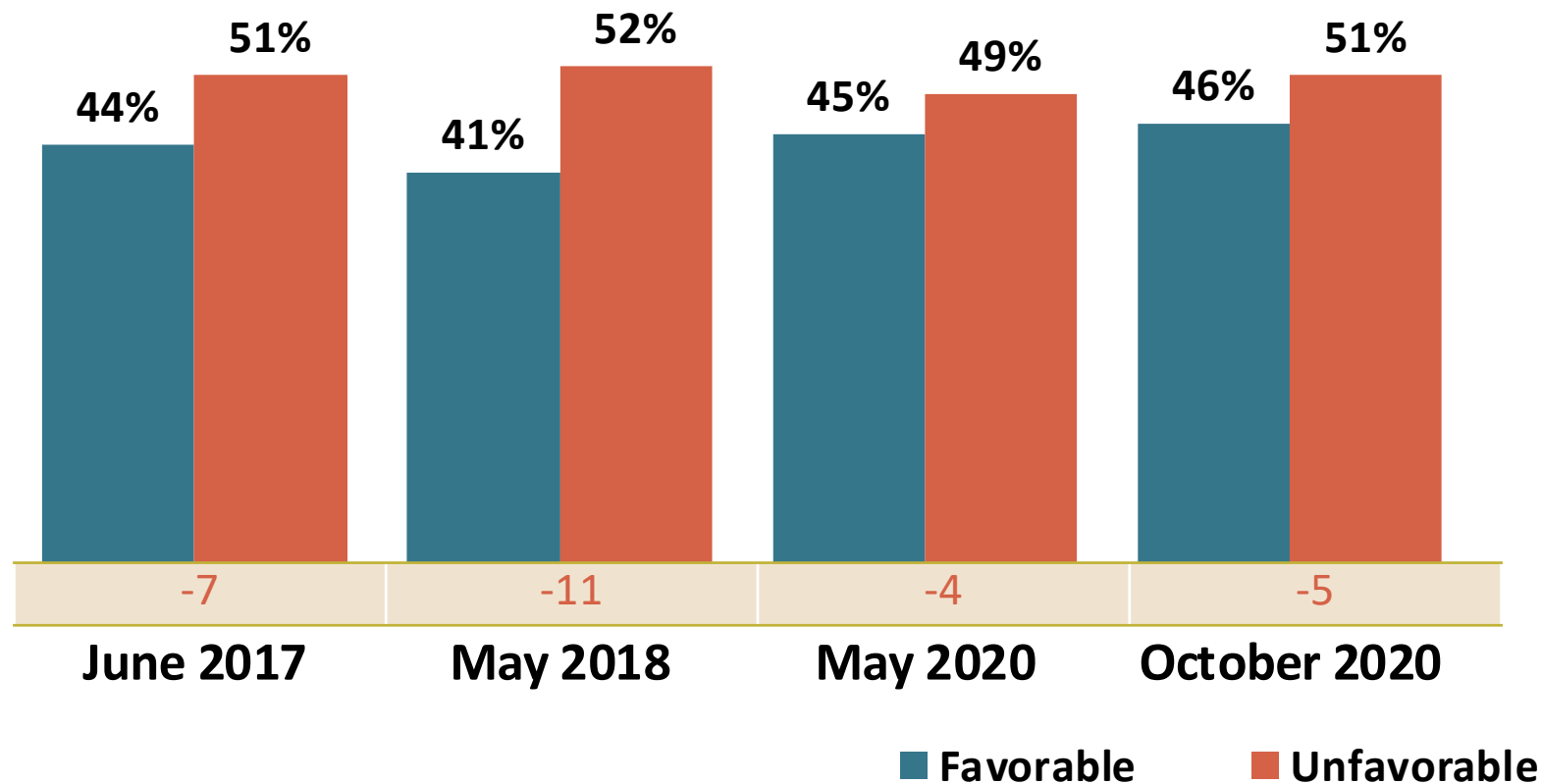




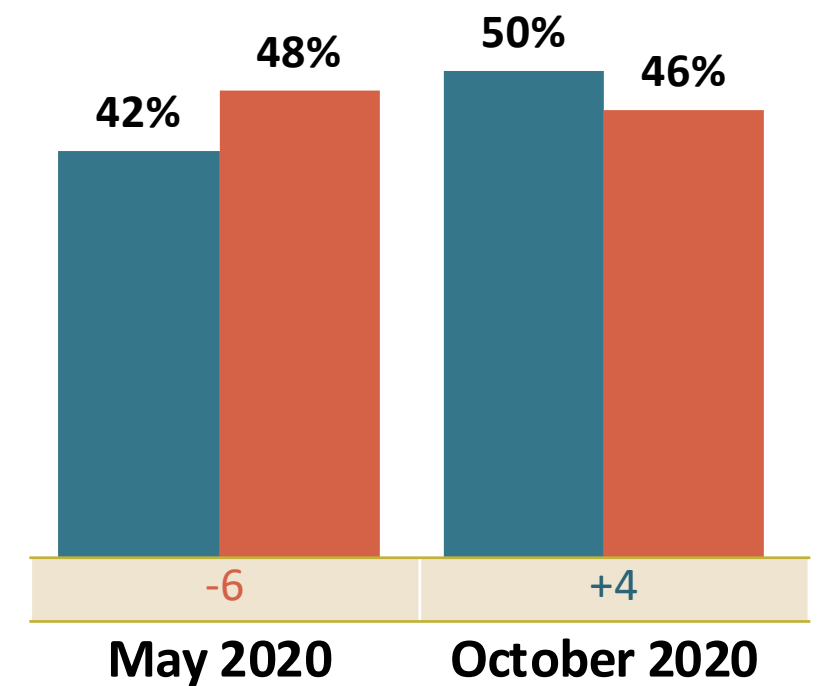
# HOW VOTERS VIEW THE CANDIDATES

President Trump's image rating has been remarkably stable since taking office and unchanged since May. Meanwhile, Biden's image is better today.

Donald Trump Image Rating Trend



Joe Biden



## Unaffiliateds have become noticeably more positive about former Vice President Biden over the past six months.

### Joe Biden Image Trend

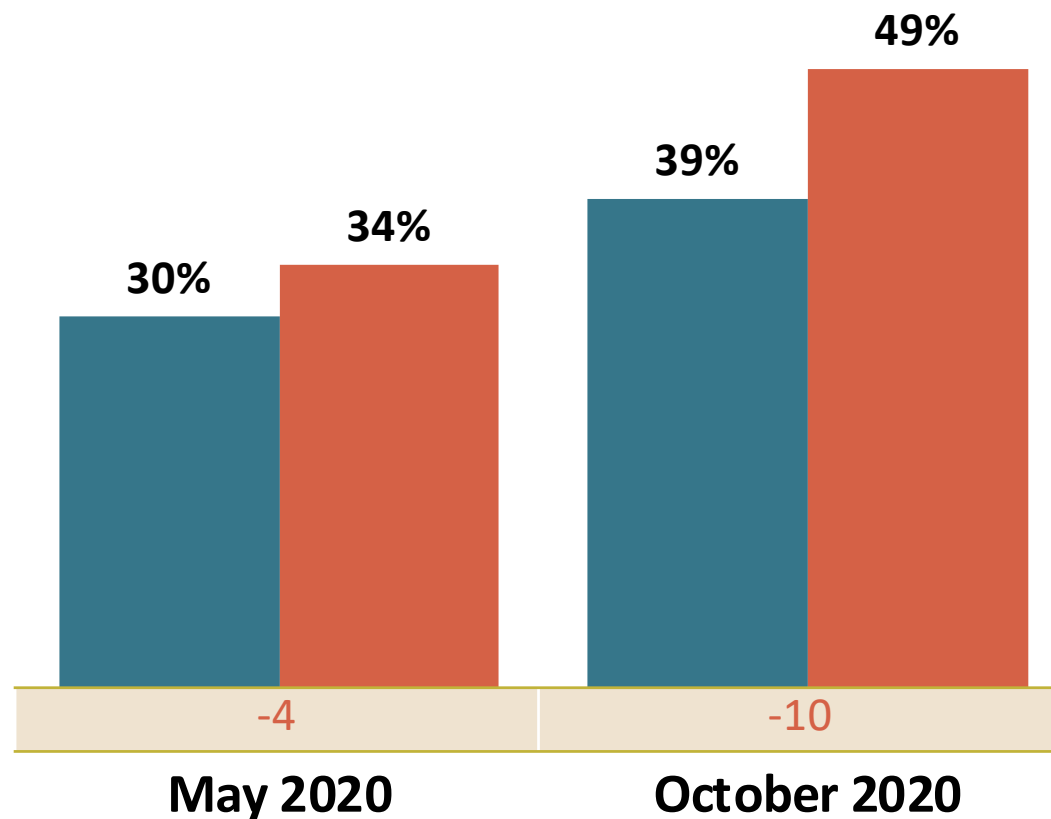
#### May 2020

#### October 2020

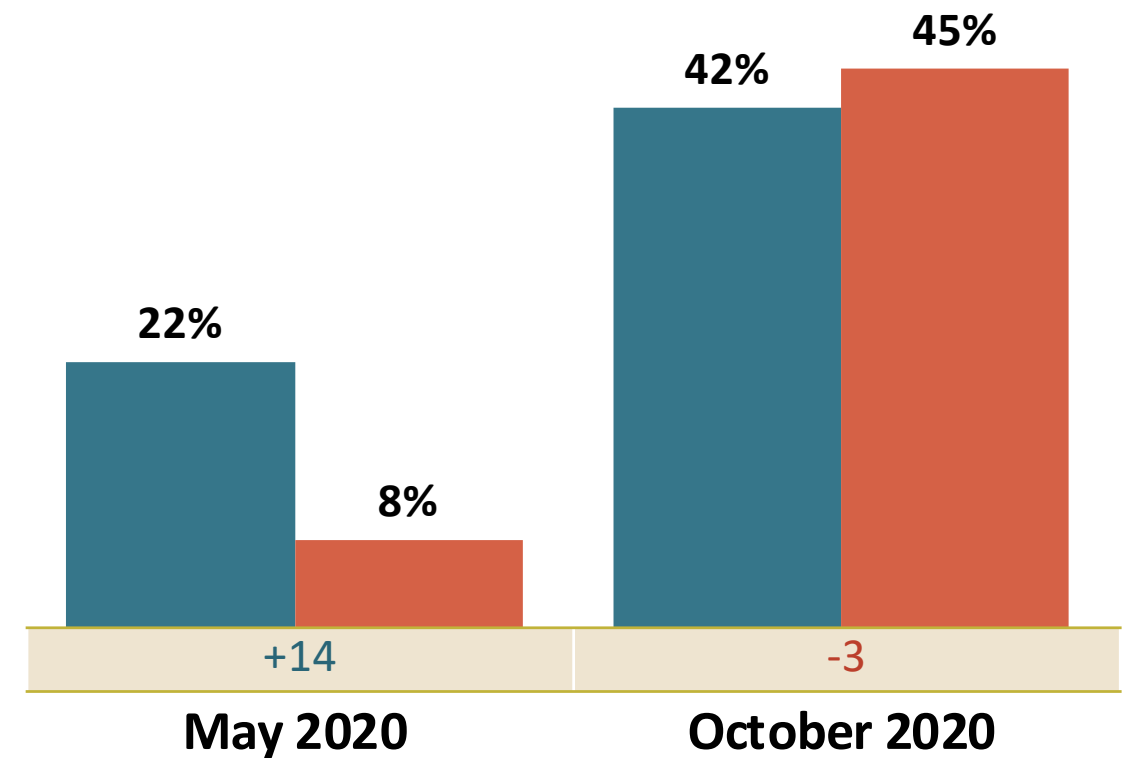
	Favorable	Unfavorable	Favorable	Unfavorable
Base Republicans	6%	85%	4%	92%
Soft Republicans	9%	79%	25%	69%
<b>Unaffiliateds</b>	<b>35%</b>	<b>52%</b>	<b>50%</b>	<b>42%</b>
Total Democrats	78%	14%	88%	12%
African Americans	81%	11%	80%	10%
White Men	34%	62%	36%	63%
White Women	32%	54%	45%	52%

Unlike what we saw back in May, **both candidates** for U.S. Senate now have images where their unfavorables are higher than their favorables.

Thom Tillis Image



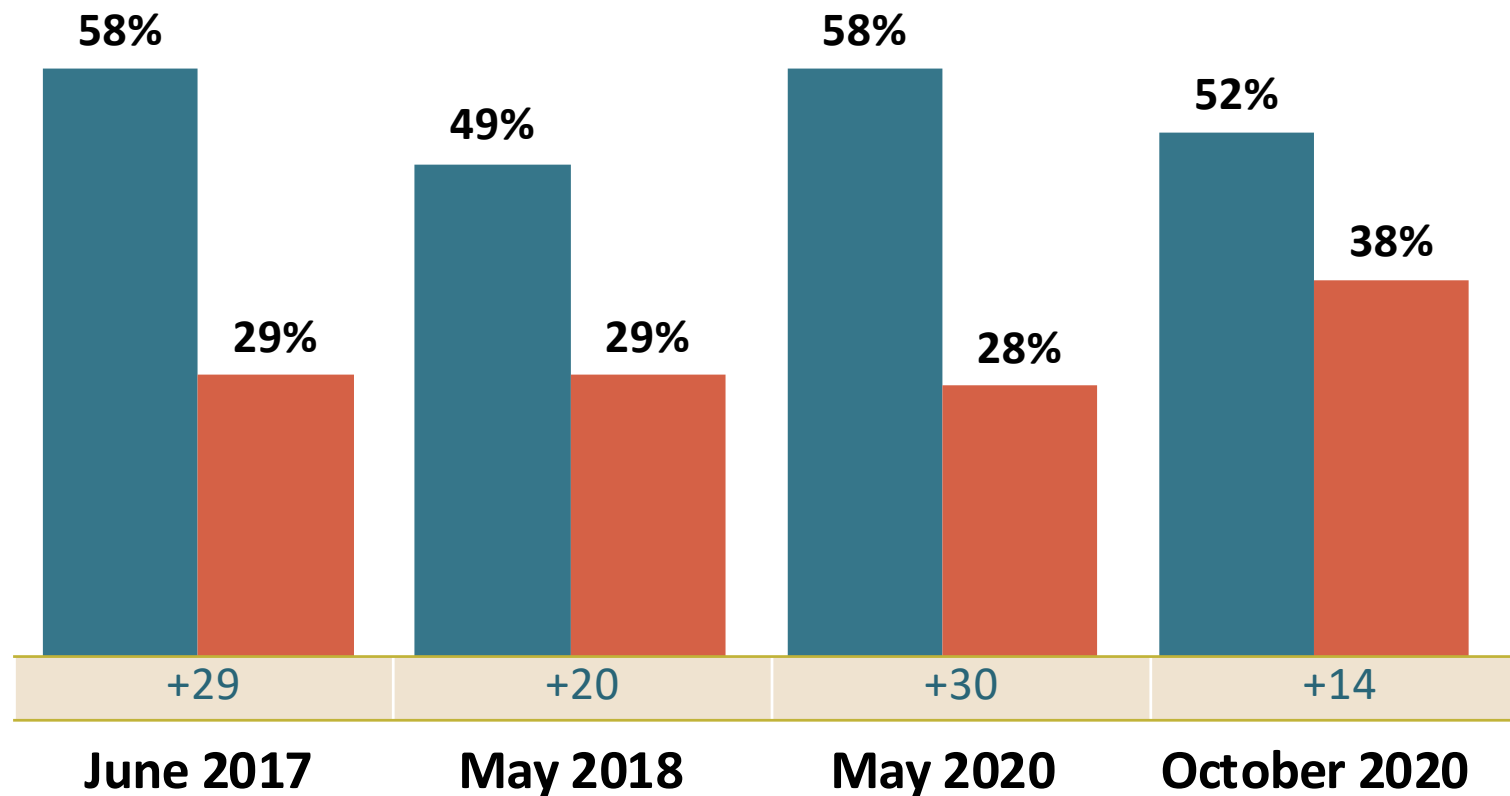
Cal Cunningham Image



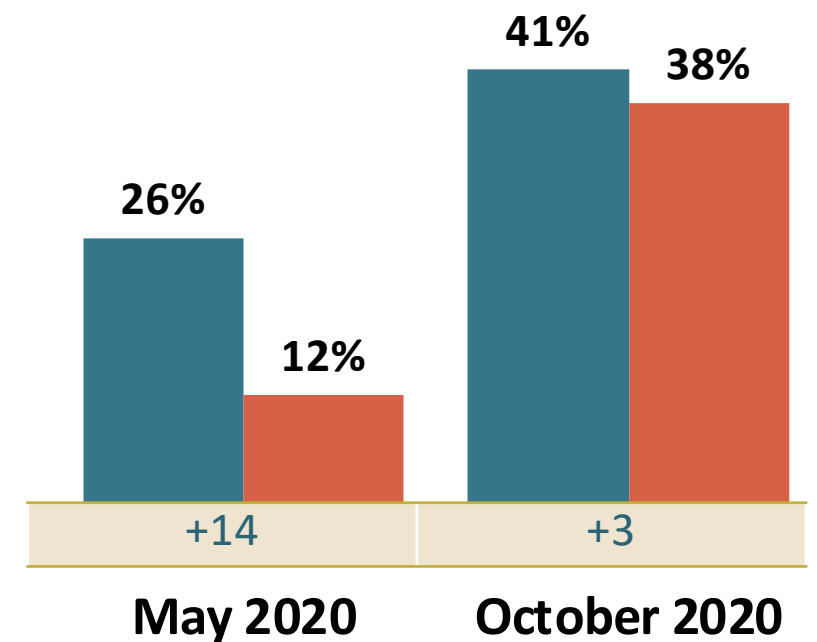
■ Favorable ■ Unfavorable

# Governor Cooper continues to have an image edge, but it's not as significant of a gap as it was back in May of this year.

Roy Cooper Image Rating Trend



Dan Forest



■ Favorable    ■ Unfavorable

## Governor Cooper has held firm with Democrats and African Americans, but his image has slipped with everyone else.

### Roy Cooper Image Trend

	May 2020		October 2020	
	Favorable	Unfavorable	Favorable	Unfavorable
Base Republicans	23%	56%	13%	75%
Soft Republicans	40%	40%	33%	54%
Unaffiliateds	65%	24%	55%	35%
Total Democrats	77%	11%	83%	11%
African Americans	77%	10%	77%	11%
White Men	46%	38%	42%	50%
White Women	60%	26%	49%	42%

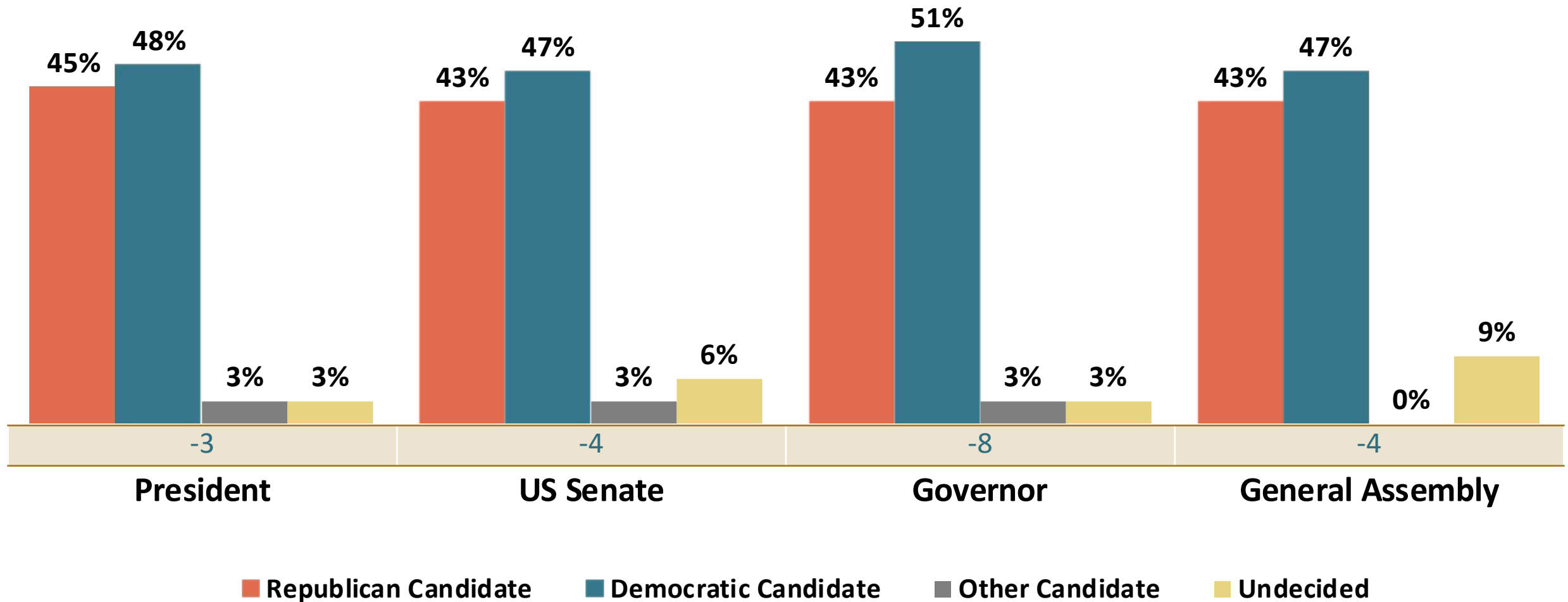


# SO, ABOUT THAT **ELECTION**...

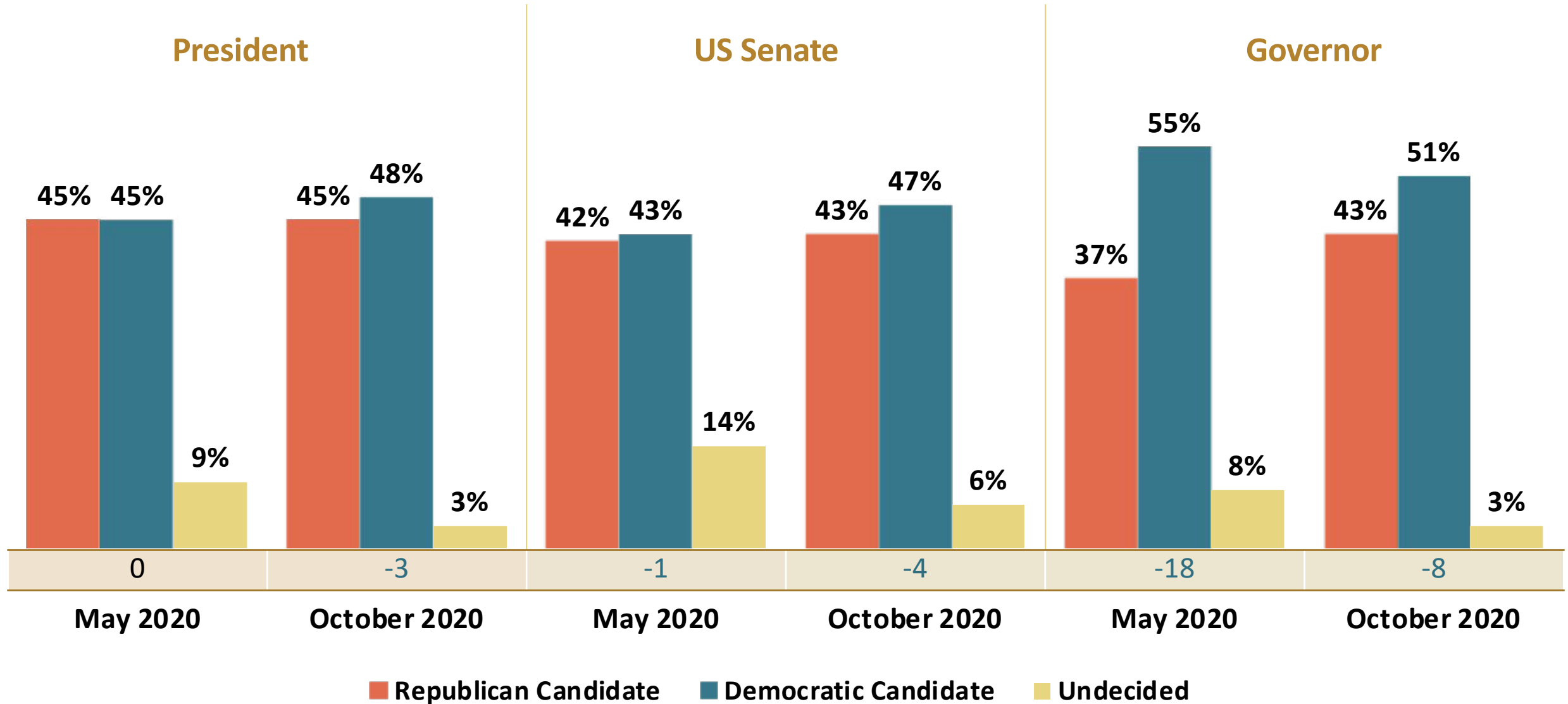


# Three of these four ballots show races within the margin of error.

Summary of Key Statewide Ballots



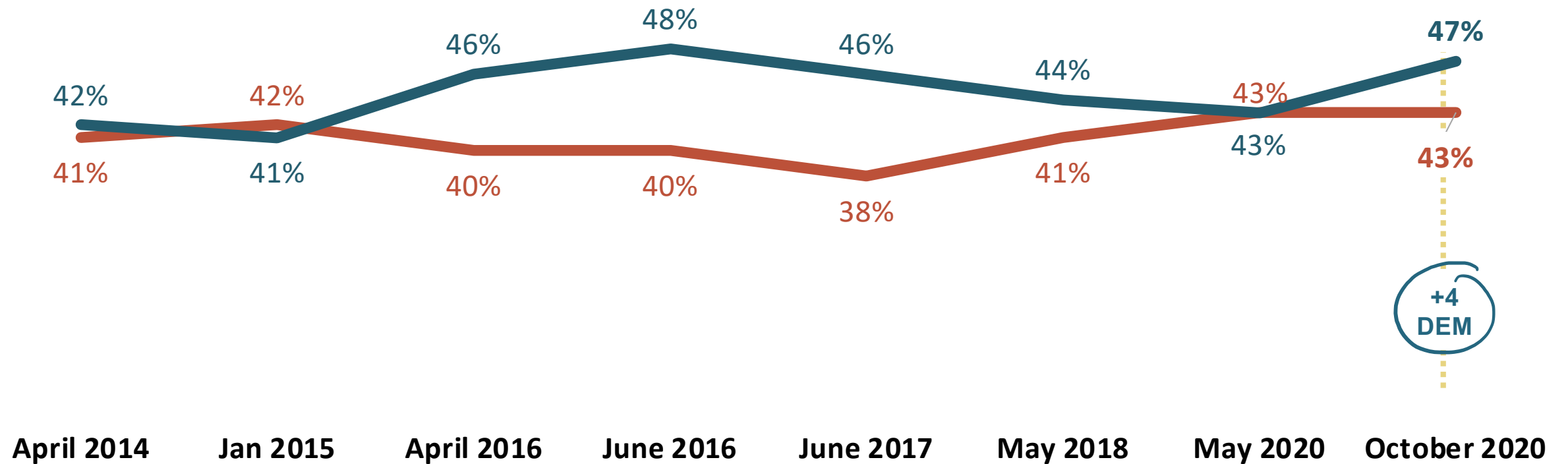
# There's not been much movement on the gender races, while the Governor's race has tightened the most since May.



The generic General Assembly ballot shows a very similar trend, but with 9% undecided, there's still some room for this to change.

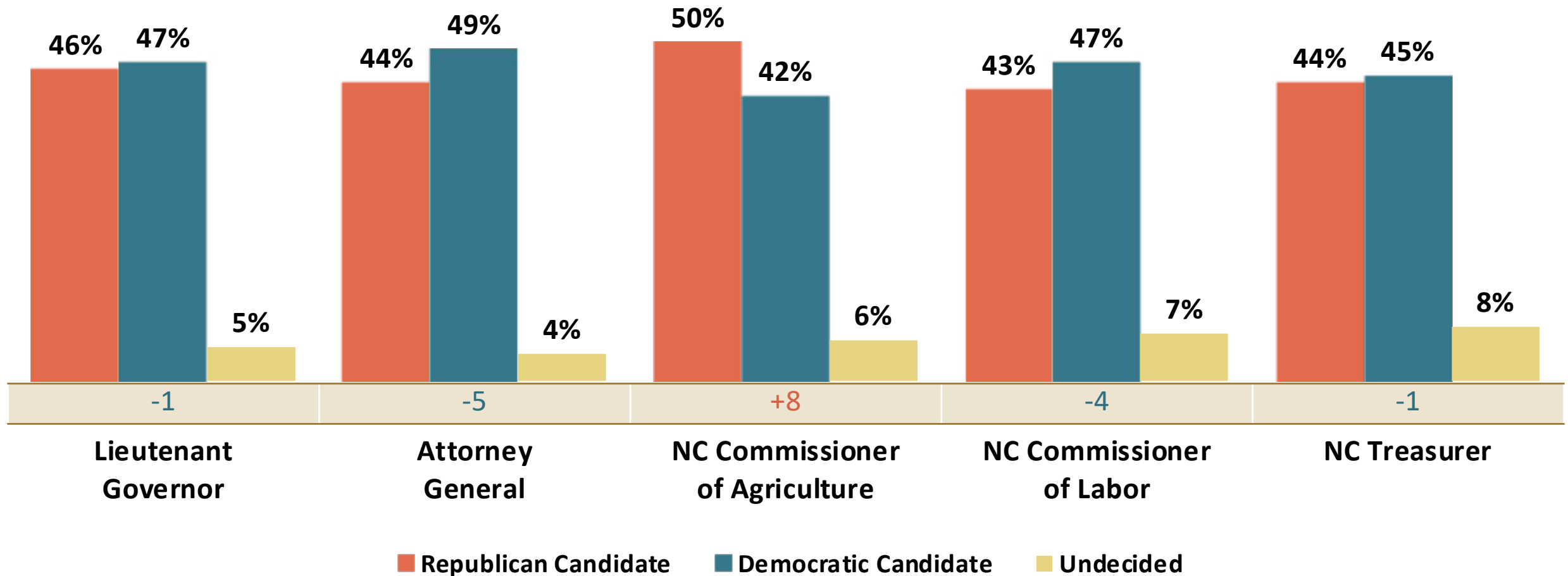
General Assembly Ballot Trend

Republican Candidate Democrat Candidate



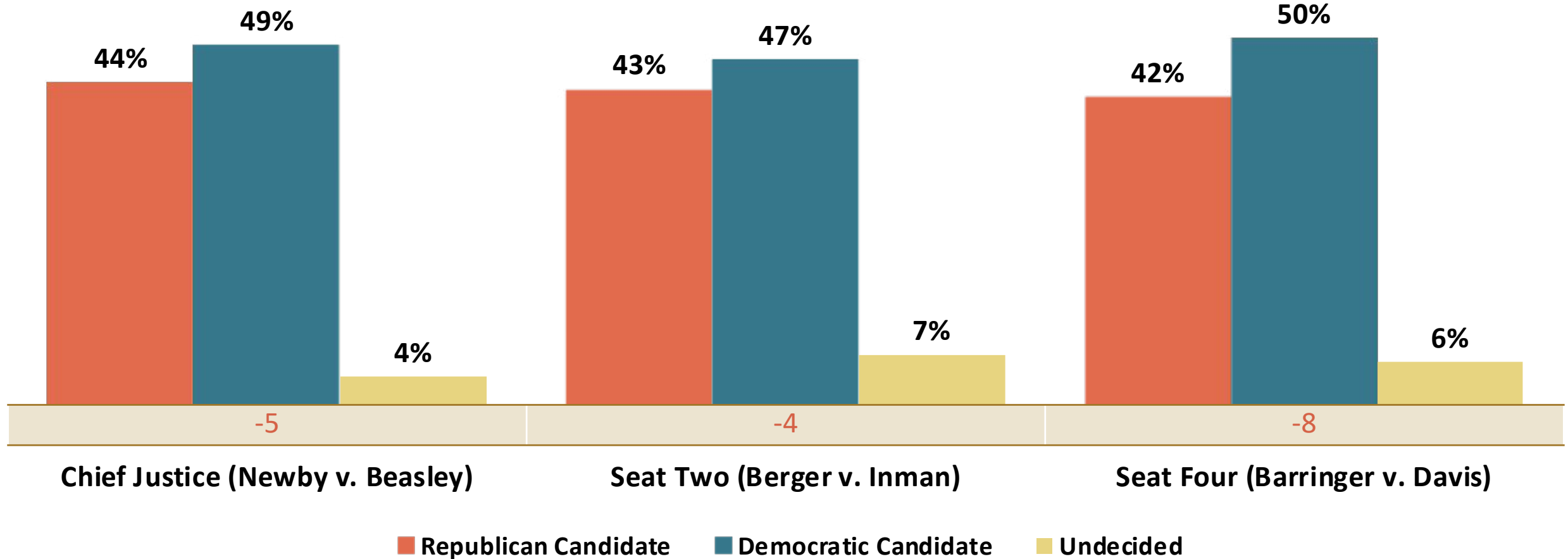
## The other down-ballot statewide offices are also quite competitive.

### Council of State Ballots



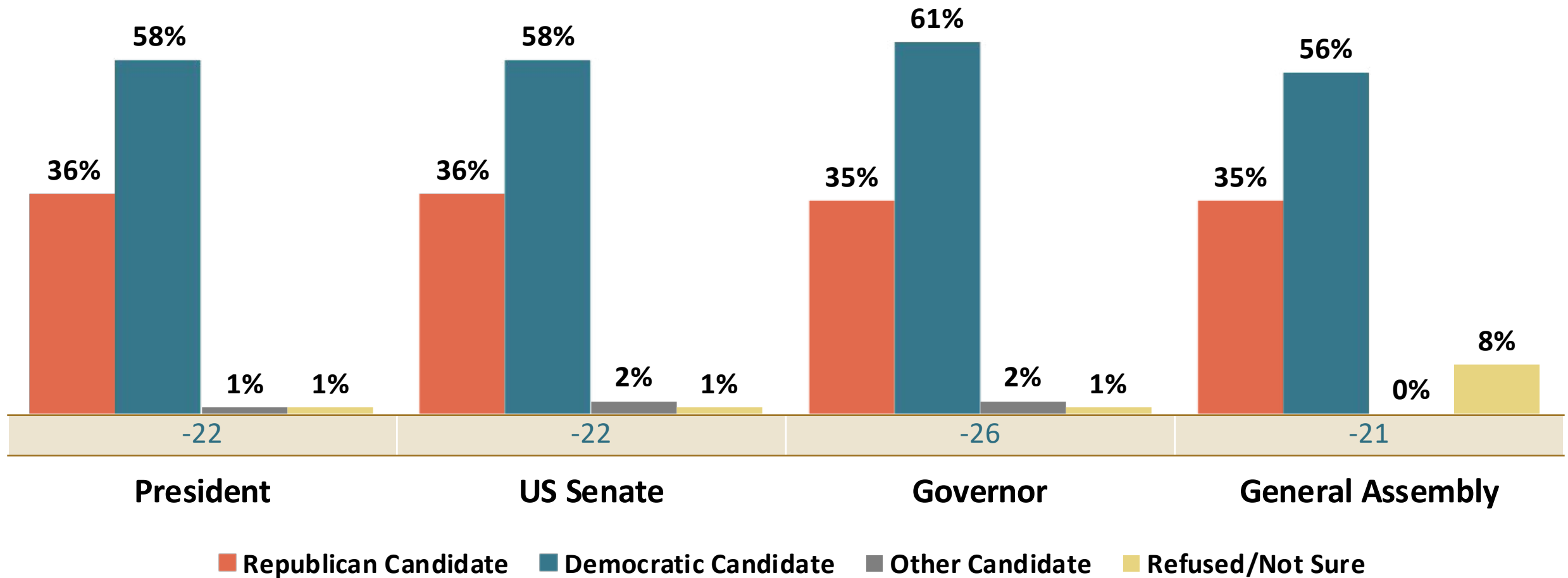
# The judicial ballots are mostly within the margin of error, too.

## Judicial Ballots



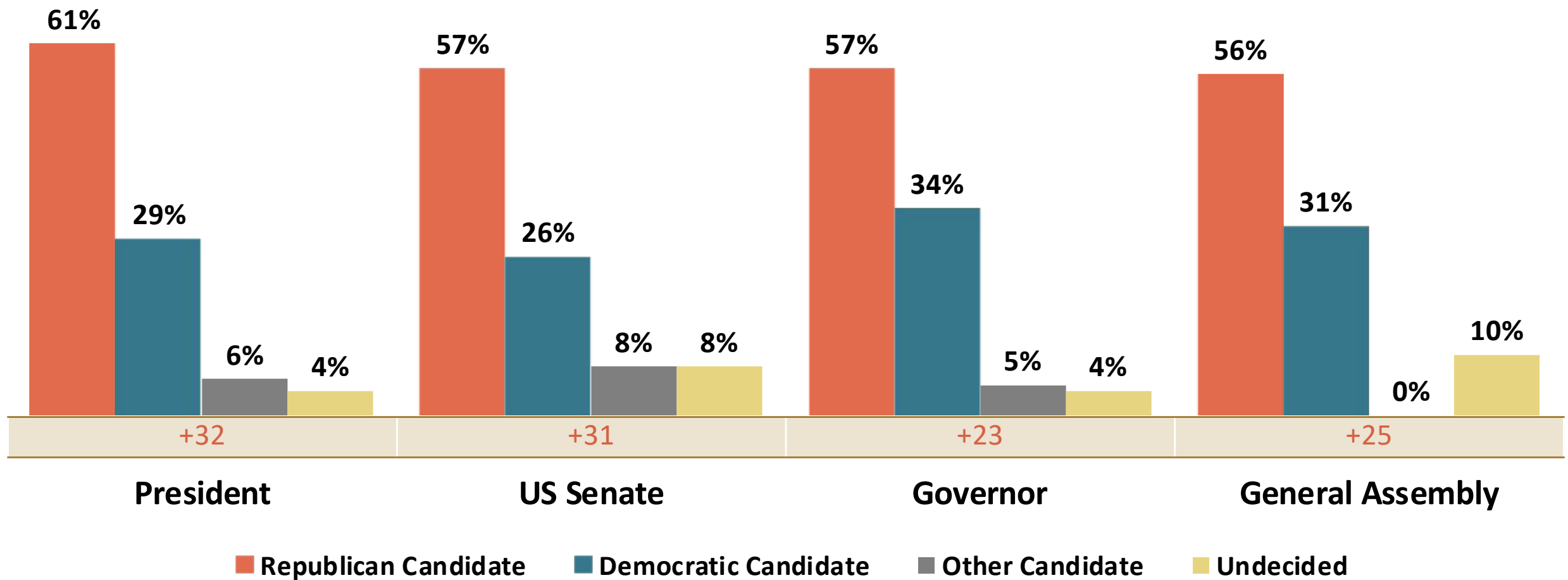
# Here is the uphill battle Republican candidates are facing in the final week.

Key Ballots Among Those Who Have Already Voted (66%)







# Good news is there's a lot of their voters who are waiting to Election Day.

Key Ballots Among Those Who Have NOT Yet Voted (34%)



# There are some clear red flags here for Republicans at the top of the ticket.

## A Look At The Several Key 2020 Voter Groups

	2016 Exit Polls	President (Now)	US Senate (Now)	Governor (Now)
 Unaffiliateds	+16 Trump	+6 Biden	+3 Cal	+15 Cooper
 White Women	+23 Trump	+11 Trump	+6 Tillis	+3 Forest
 Seniors (Ages 65+)	+23 Trump	+6 Biden	+9 Cal	+13 Cooper
 White College Graduates	+19 Trump	+19 Biden	+19 Cal	+24 Cooper

### So, How The Strong Trump '16 Voter Groups Are Doing...

White Non-College Voters	+44 Trump	+35 Trump	+29 Tillis	+26 Forest
White Men	+41 Trump	+22 Trump	+19 Tillis	+16 Forest



# Republicans and Democrats are less settled on their vote choices in the US Senate race (compared to the other major ballot tests).

## Key Ballots by Party Registration

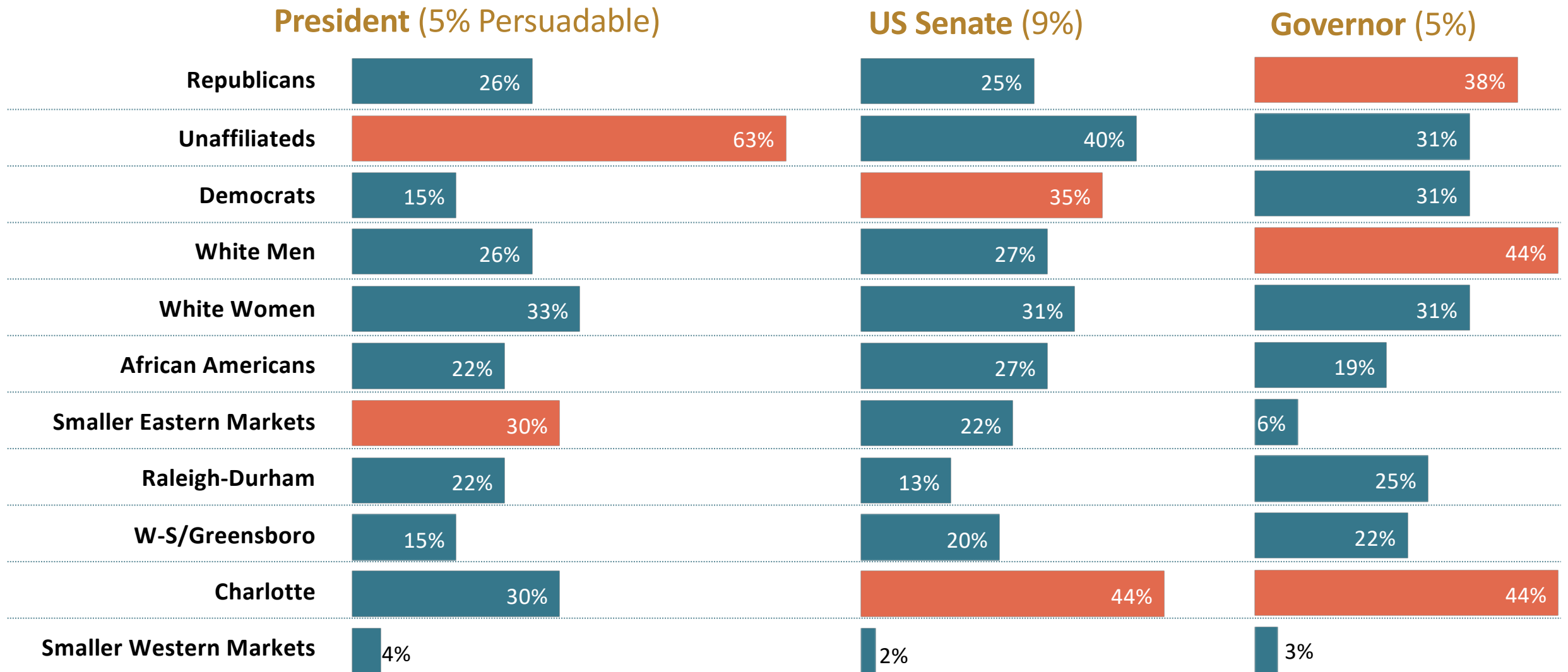
	Presidential Ballot		US Senate Ballot		Governor Ballot	
	Trump	Biden	Tillis	Cunningham	Forest	Cooper
Republicans	86%	8%	79%	12%	83%	12%
Unaffiliateds	40%	46%	42%	45%	37%	52%
Democrats	11%	87%	12%	81%	10%	87%



6% of Republicans are undecided (2% voting Third Party)

4% of Democrats are undecided (3% voting Third Party)

# Not all persuadable voters look alike. Up-for-grab voters look different across the three top-of-the-ticket ballots.

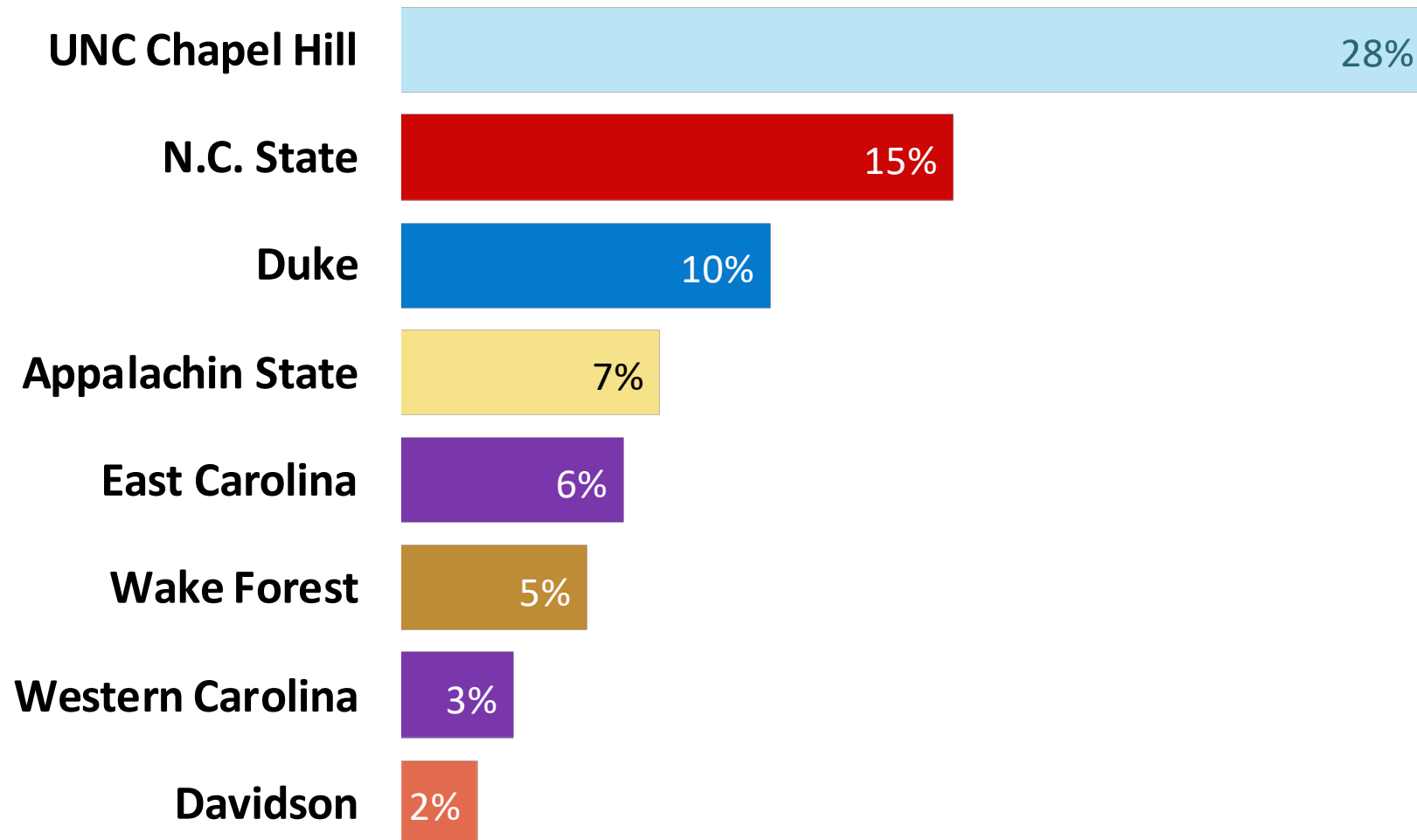




# TIRED OF **DIVISIVE** **POLITICS?**

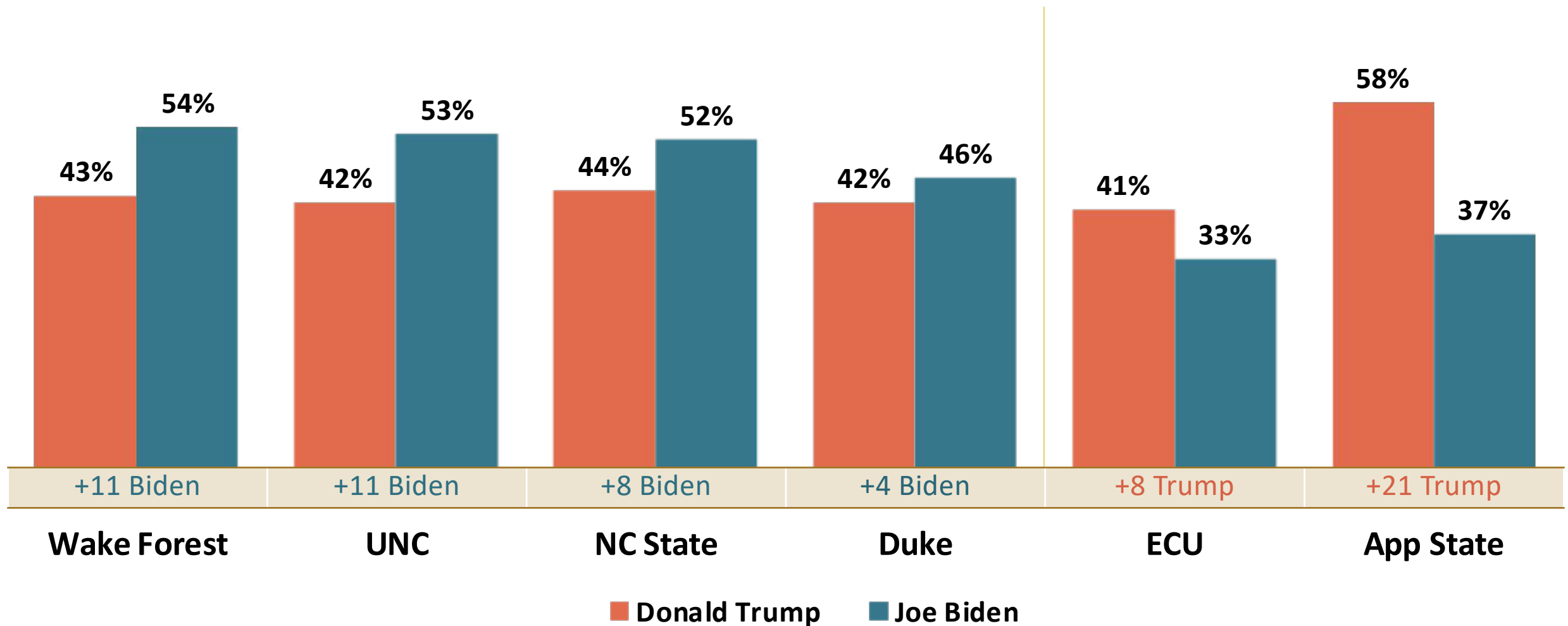
## We do have one contest that's not within the margin of error: North Carolina's favorite college sports team.

“Completely changing topics, which one of the following North Carolina colleges or universities would you say you tend to pull for more when it comes to college sports? Are you more of a fan of...”



# Biden has a double-digit lead with Demon Deacon and Tarheel fans, while Trump is going to need a lot more Mountaineer magic in the closing days.

Presidential Ballot by Favorite NC College Sports Team



M E E T   N G  
S   R E E T

Pollster of the Year



A public opinion research firm for the modern era.

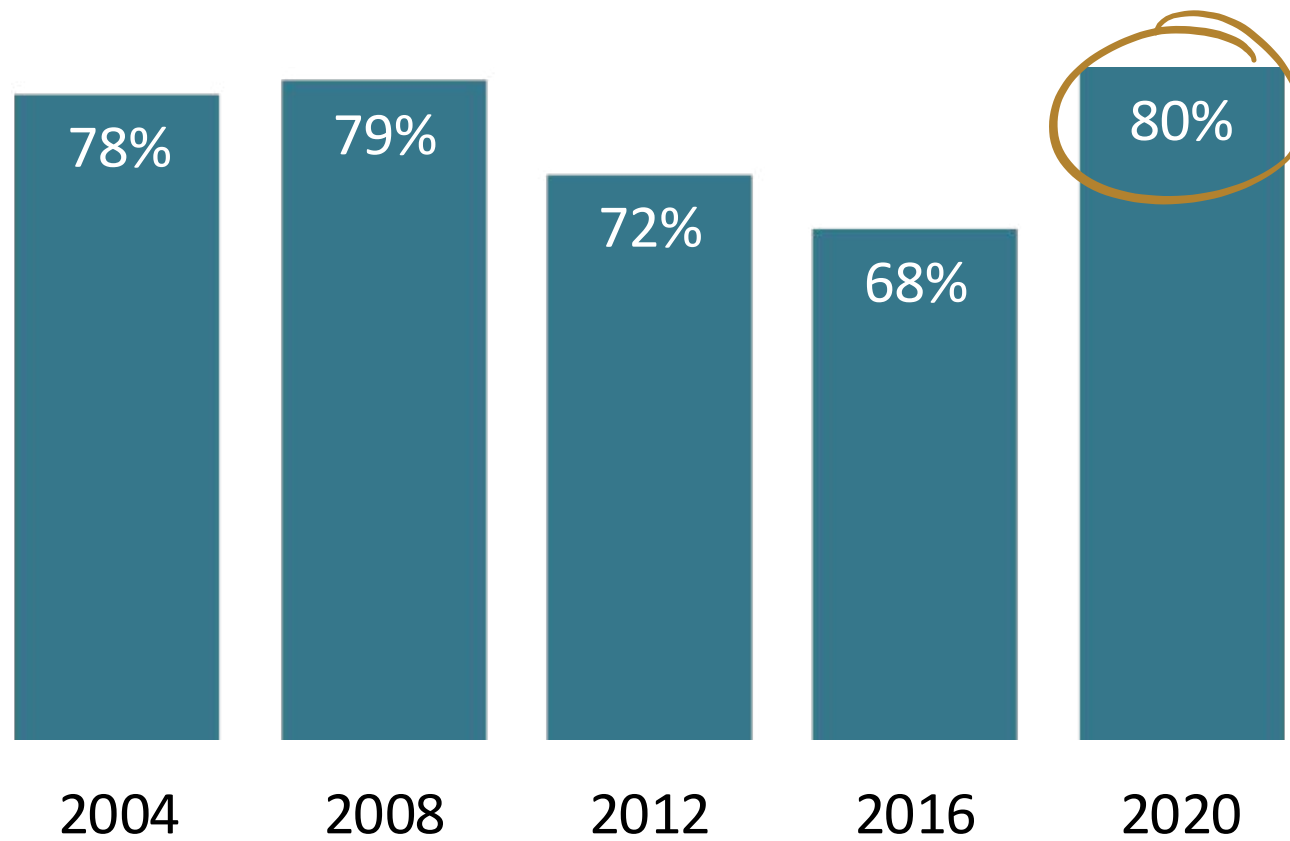
[www.meetingst.com](http://www.meetingst.com)



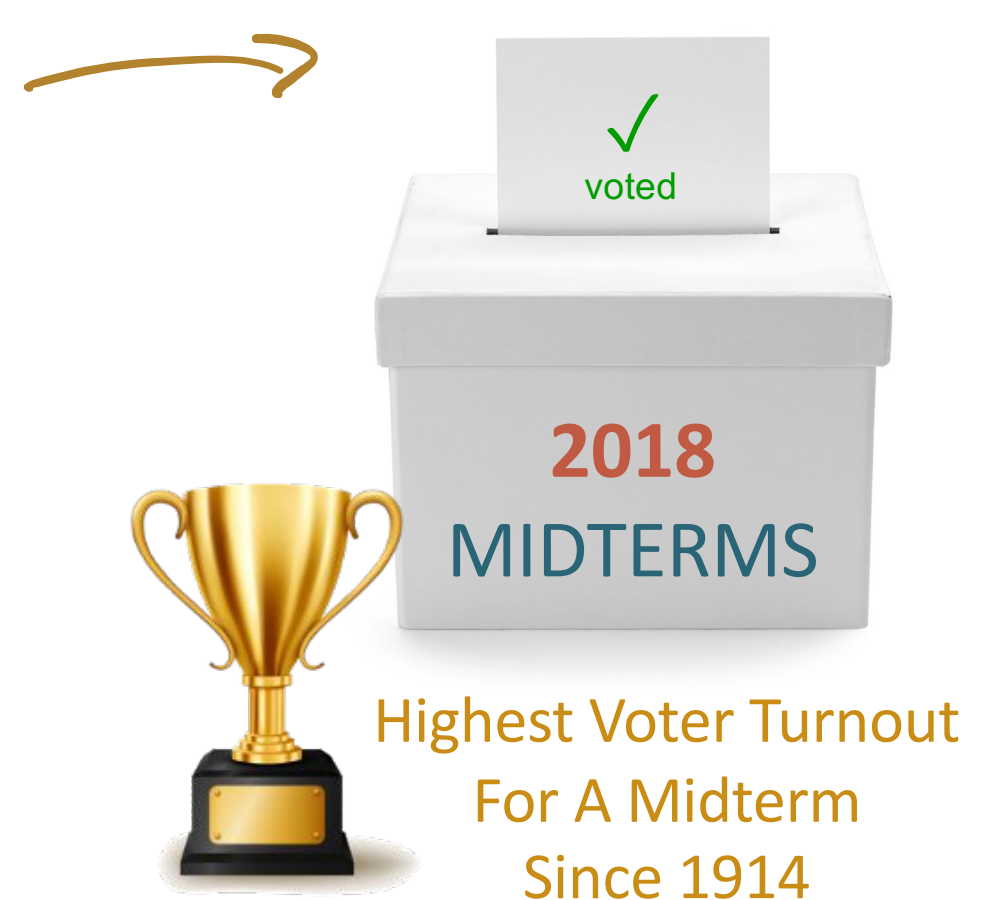
# FINALLY, **BUCKLE UP!** IT COULD GET BUMPY

All signs are pointing to record voter turnout, and this has been building for some time (even before Covid-19 and the death of George Floyd).

Very Interested In Elections In September Of Election Year



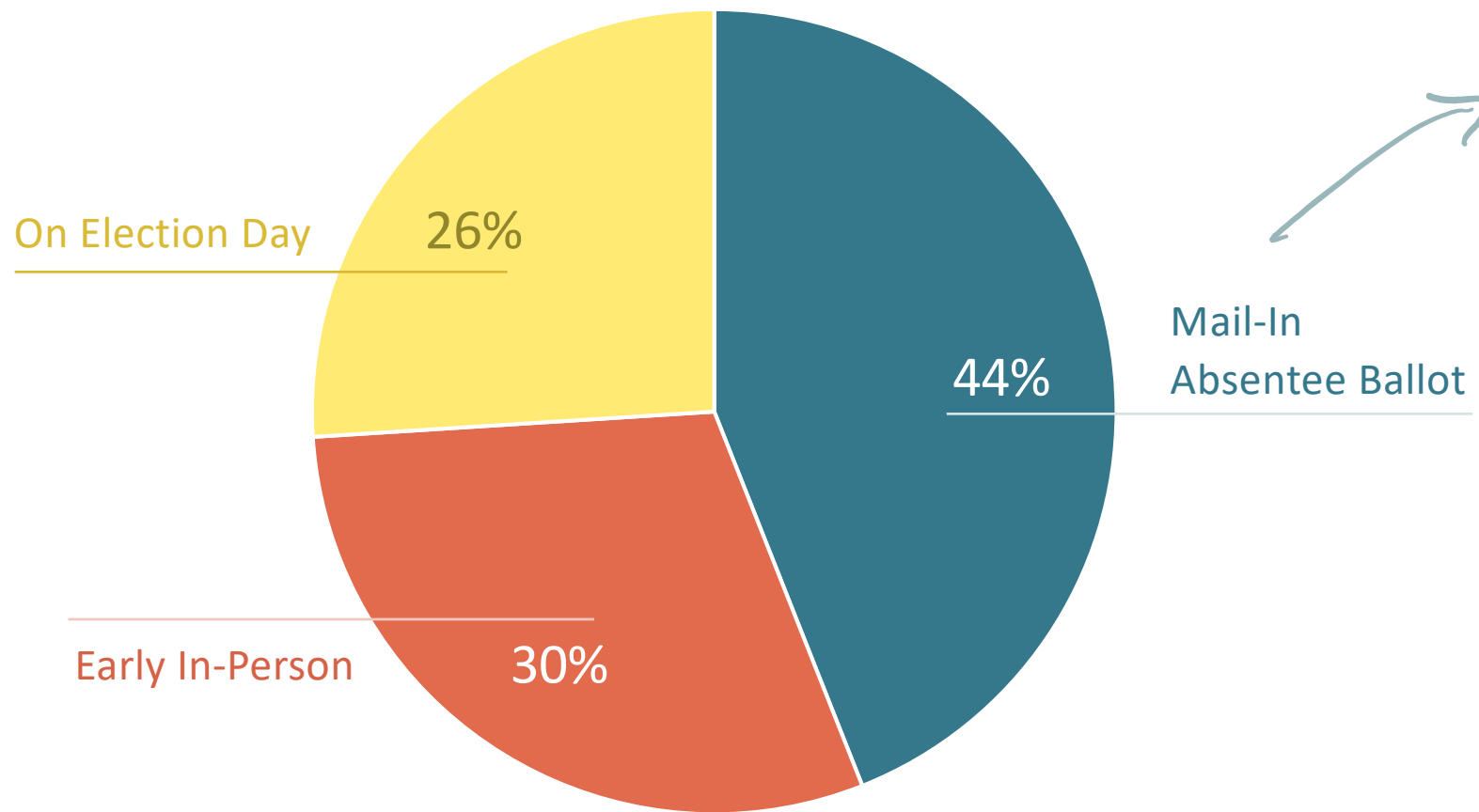
Source: NBC News - Wall Street Journal Poll (% 9-10)





# Here's where things get tricky, though: how voters cast their ballots this year will be a whole new experience for us.

“And how do you plan to vote in the November elections?”

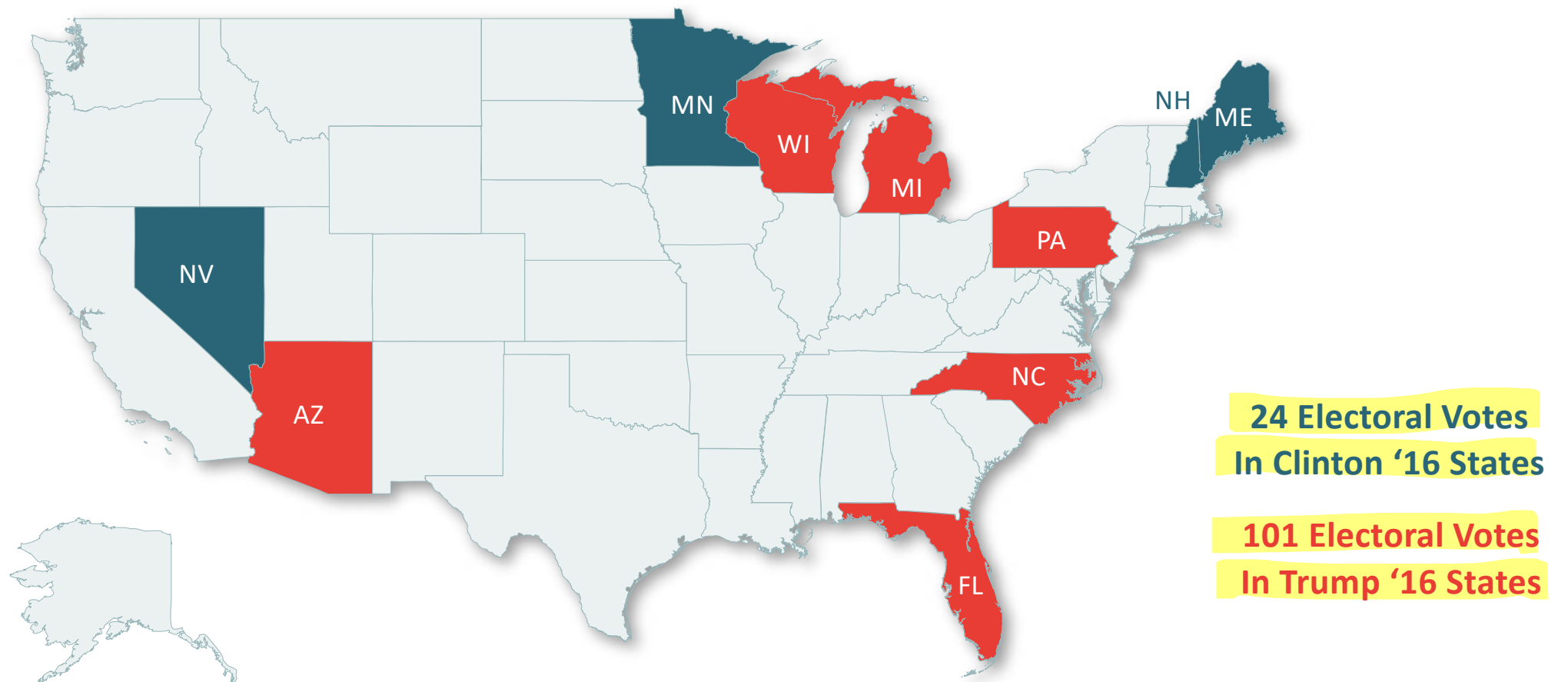


Let's assume 10% of those who are mailing in their ballots wait until the last minute...

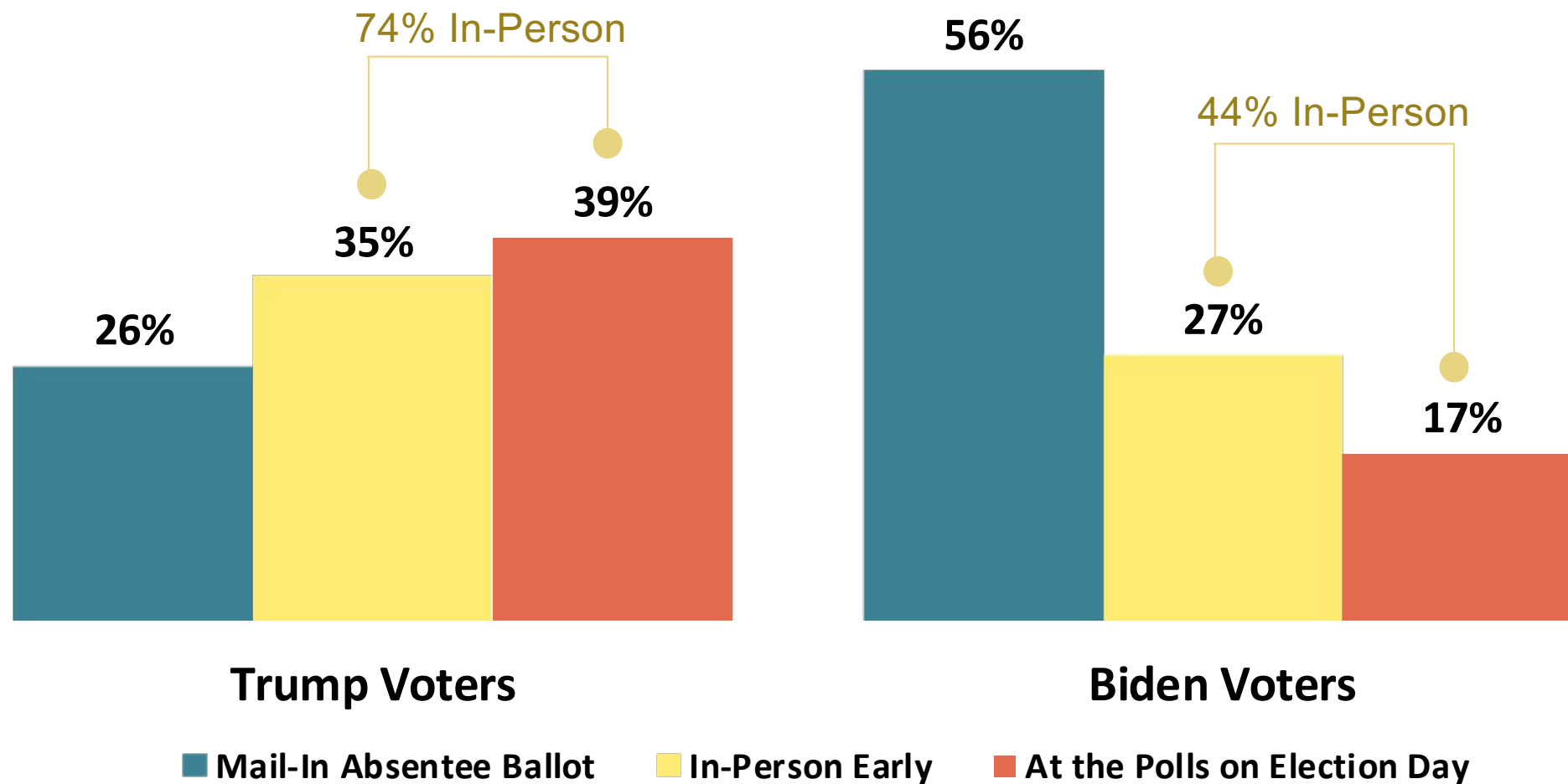


And, let's assume each state votes exactly as they did in 2016...

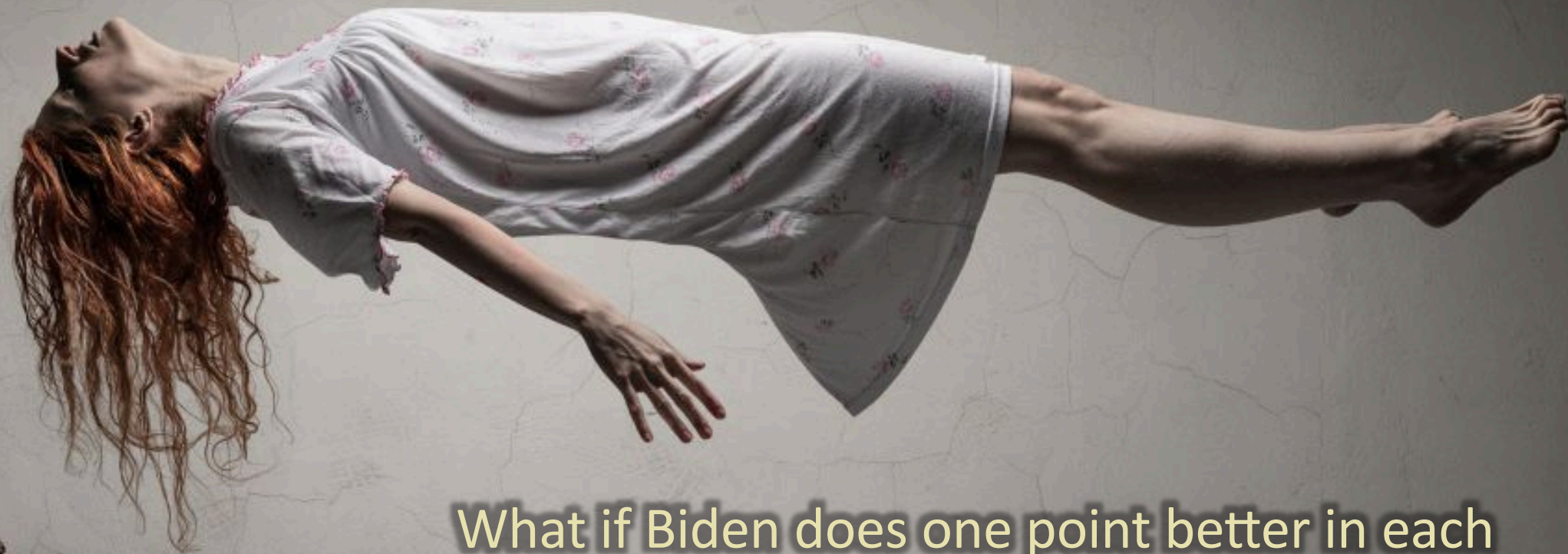
**On Election Night, we could have 10 states where the number of late-arriving votes will be greater than the margin of victory.**



**But, it gets even more complicated than that. Most Trump voters say they will vote in-person, while most Biden voters are mailing it in.**



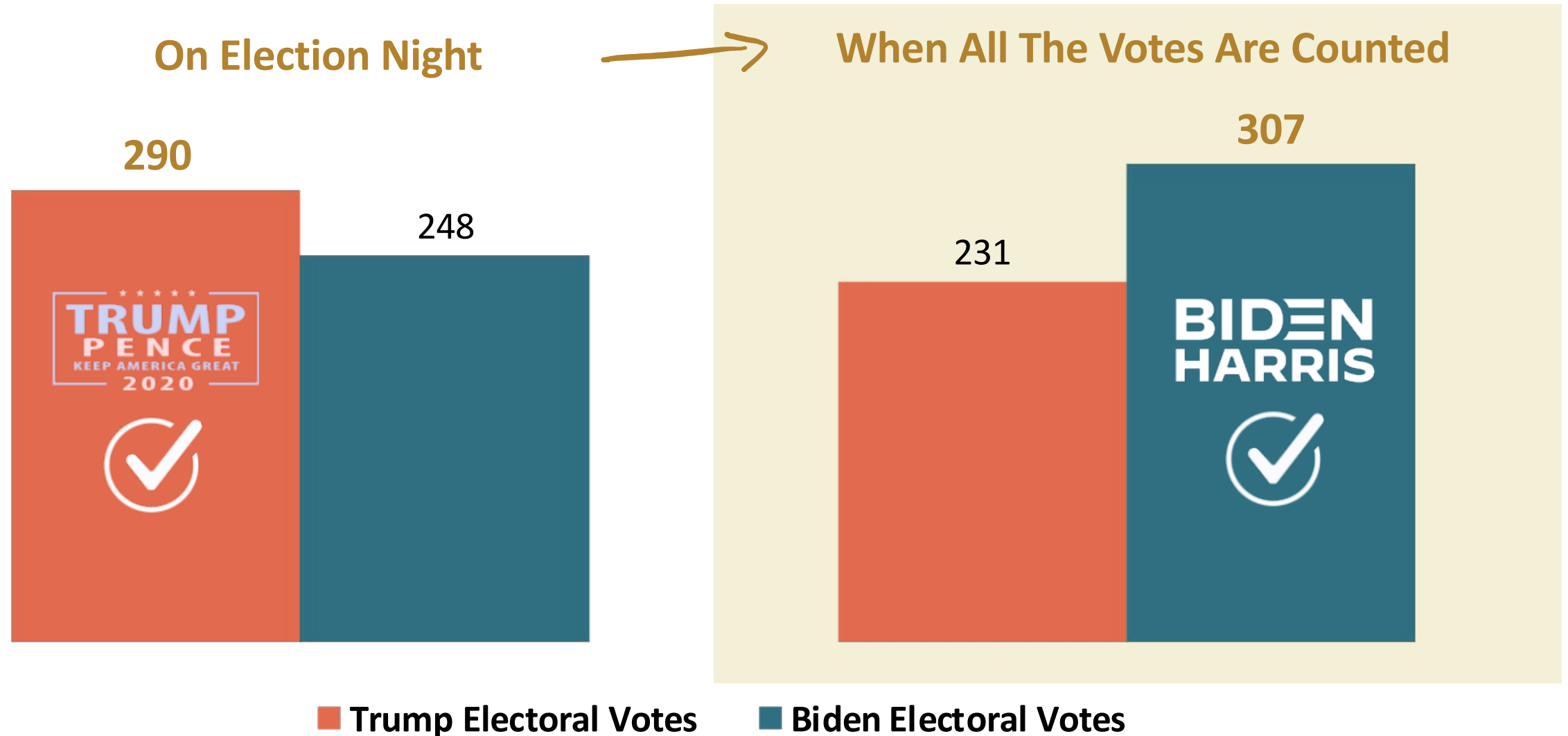
**Here's what keeps me up at night...**



**What if Biden does one point better in each state than Clinton did in 2016, and Trump does one point worse than he did in 2016?**

**Here's what COULD happen...**

**Trump looks like the winner on Election Night, but absentee ballots in FL, PA, and WI could swing the race over to Biden in the end.**



M E E T   N G  
S   R E E T

Pollster of the Year



A public opinion research firm for the modern era.

[www.meetingst.com](http://www.meetingst.com)