

May 27, 2008

To: Interested Parties

Fr: John Anzalone / Jeff Liszt

Re: The Changing Political Environment in North Carolina

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Kay Hagan faces a significantly more advantageous political environment than previous Democratic Senate candidates in North Carolina. Democratic registration has increased, and expanded participation in this year's Democratic primary suggests higher turnout among Democrats in the fall. At the same time Democratic turnout is rising, voters are more pessimistic about the direction of the country, and the Republican leadership in Washington shoulders much of the blame. Elizabeth Dole faces an anti-incumbent, anti-Republican environment on the heels of big 2008 Democratic Congressional wins in Southern Republican areas like LA-6 and MS-1.

- Through April there were almost 190,000 new registrants in North Carolina. Among new registrants, Democrats outnumbered Republicans by more than 2:1 (92,819 Democrats compared with 39,576 Republicans). Factoring in party changes further broadens the gap – in 2008, Democrats have seen a net increase of 123,841 voters compared with a net increase of just 14,061 Republicans.
- Among new registrants, 32% are African-American. According to voter file counts, just 18% of 2004 general election voters were African-American. Turnout among African-Americans will likely be significantly higher this year than in recent U.S. Senate contests.
- Approximately 1.6 million votes were cast in this year's Democratic primary – over 350,000 more votes than Elizabeth Dole received in the 2002 general election. Approximately the same number of votes were cast in the Democratic primary in 2008 as Erskine Bowles received in the 2004 general election. North Carolina Democrats are energized, and turnout among them will be high in the fall.
- In 2004 exit polling, Erskine Bowles won 57% to 40% among new voters. This year's surge of new voters will be critical for Hagan's success.
- The political environment has changed significantly since the last U.S. Senate race in 2004. In exit polling that year, 57% of voters approved of George W. Bush's job performance, and just 42% disapproved. As of February, Bush's rating had flipped to 38% approve / 58% disapprove. In 2004 Burr won 85% to 14% among voters who approved, while Bowles won 92% to 7% among voters who disapproved.
- The most important issues in this year's race favor Democrats. Erskine Bowles won 62% to 36% among voters who rated the economy negatively, while Richard Burr won 64% to 35% among voters who rated the economy positively. Kay Hagan has a clear advantage heading into an election cycle with slipping ratings for the economy.
- Erskine Bowles won 81% to 17% among voters who rated the economy as the most important issue. Bowles won 74% to 24% among voters who rated the war as the most important issue. Both issues have spiked in importance since then.