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Why Dems Should Invest in North Carolina in 2024



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Takeaways

- Previously purple battleground states that President Obama won have moved significantly to the right since 2008, putting states like Ohio, Iowa, and Florida out of reach, while North Carolina has seen little discernable swing in presidential elections.
- Democrats have managed to win the governor's mansion nine times since 1976, including in seven of the last eight cycles, and presidential years have generally been more favorable to Democrats running in statewide elections in the state.
- Investing heavily in Florida in 2020 spread Democratic resources thin, and it precluded Democrats from spending in more flippable states like Georgia, Arizona, or North Carolina. Joe Biden's allies spent over \$108 million in Florida and they spent less than \$16 million in North Carolina—Biden lost North Carolina by 1.5 points and Florida by 3 points.
- Democrats overperformed expectations in the 2022 midterms in North Carolina and significantly underperformed in other states, including Florida.

Every election cycle, presidential campaigns, party donors, and their super PAC allies make strategic investments in states that they think provide the most efficacious path to 270 electoral votes. And every cycle, there are ambitious investments placed in an effort to flip states that are leaning in the opposing party's favor—with the reasoning being that even if the chances of winning are low, it puts the other party on defense and forces them to spread their resources.

In 2020, Democrats and their allies invested significant resources in solid red states like Texas, Iowa, and Ohio. The polls showed that Florida was competitive and worth investment, given the 29 electoral college votes that would be won if it flipped, yet Democrats ended up losing the state by 3 points (370,000 votes). Joe Biden and his allies spent more in television ads in Florida than Arizona, Georgia, Nevada, and Wisconsin combined over the last six months of the 2020 election. And there's little indication that money would be better spent in Florida in 2024 than last time around (in fact, there are quite a few data points that indicate the opposite).

While it's true that Democrats have been stuck in a status quo electoral state in North Carolina for over a decade, it is also a matter of fact that the state has not swung much towards Republicans as

other previous purple battleground states have since 2008. Joe Biden lost North Carolina by 1.5 points (less than he lost Florida in 2020) and the midterm elections showed that there is a resilient electorate that will keep the state competitive—potentially even to the point of flipping for Biden, handing him 16 crucial electoral college votes. But this can come to pass only if Democrats and their allies make investments in the state leading up to 2024.

North Carolina Presidential Swings

Some would be rightfully hesitant to invest in North Carolina given its recent presidential election history. Democrats have won the state in a presidential election year only once since 1976, when Barack Obama eked it out by 0.3 points in 2008. But while previously purple battleground states that Obama won have moved to the right since the 2008 presidential election, such as Ohio, Iowa, and Florida, North Carolina has seen very little swing to the right (or left) in presidential elections over this period of time.



From 2008 to 2020, North Carolina swung 1.6 points to the right, while Florida swung 6.1 points in that direction. Going back one more election cycle, the 2004 to 2020 swings of North Carolina look much closer to Georgia than Florida, Ohio, or Iowa. From 2004 to 2020, North Carolina swung 11.2 points left, while Georgia swung 16.7 points left.

	2004 to 2020 Swing	2008 to 2020 Swing
North Carolina	D+11.2	R+1.6
Georgia	D+16.7	D+5.5
Florida	D+1.7	R+6.1
Ohio	R+5.9	R+12.6
Iowa	R+7.5	R+17.7

Source: Analysis of FEC election results 2004–2020.



2024 Governor’s Race

While there is no North Carolina US Senate seat up in 2024, the governor’s mansion is up for grabs as term-limited Democratic Governor Roy Cooper is running out the clock. In 2020, Donald Trump won North Carolina by 74,000 votes, even as Cooper won re-election by 250,000 votes. While split ticket voting has diminished in recent years, Democrats have still managed to win the governor’s mansion nine times since 1976 and seven of the last eight cycles—and presidential election years have generally been more favorable to Democrats running in a statewide election in the Tar Heel state than midterm years.

State Attorney General Josh Stein is the favored Democratic candidate running for governor in 2024, and he is primed to go up against a MAGA cultural conservative in the Republican lieutenant governor, Mark Robinson. Republicans in the state legislature just enacted a 12-week abortion ban—overriding Governor Cooper’s veto with their supermajority in the legislature. If Robinson wins the governor’s mansion, there will be nothing from stopping the Republican legislature and governor from signing a blanket abortion ban into law. Abortion will be on the ballot in North Carolina in 2024, and Democrats will be hammering the likely Republican nominee on his position when election time comes, among many far-right stances. This should play in Democrats’ favor up and down the ballot.

Additionally, North Carolina’s governor’s race will be the most competitive gubernatorial election in 2024, and a significant war chest of resources from the Democratic Governors Association will be going towards winning the race—which will only bolster Biden’s chances of winning the state if he decides to play there.

2022 North Carolina Democratic Overperformance

According to the election analysis organization Split Ticket, their post-election model calculated that Cheri Beasley should have lost North Carolina's US Senate race in 2022 by 6.7 points, but she outperformed the model by 3.4 points and lost by a 3.2-point margin (the equivalent of 120,000 votes).

Compare this to Florida, where Republicans overperformed. Senator Marco Rubio comfortably won his re-election by 16 points over former Democratic congresswoman Val Demings (the equivalent of 1.3 million votes). And Rubio outperformed Split Ticket's post-election model by 3.4 points.

Fundraising and Ad Investments

Looking back to the 2020 presidential election, Florida was a massive expense for Joe Biden and his Democratic allies. Data from AdImpact shows that the Biden campaign and their allies poured the most ad investments into Florida of all the battleground states in 2020—more than Arizona, Georgia, Nevada, and Wisconsin combined. Investing so heavily in Florida spread Democratic resources thin, and it precluded Democrats from spending more robustly in flippable states. Democratic allies spent over \$108 million in Florida in 2020 and less than \$16 million in North Carolina.



The investment map will look significantly different in 2024, with more resources going to hold Arizona, Georgia, Nevada, and Wisconsin, but should Joe Biden's allies wish to put the GOP on their back foot—having a small yet still very possible chance of flipping a state and making an impact in a crucial down-ballot race—then North Carolina is the best candidate.

Democratic donors and super PACs saw Florida as more crucial and flippable than North Carolina in 2020, and they were wrong. Over the entire 2021–2022 election cycle, Florida Democrat Val Demings raised and spent \$80 million in her US Senate bid, while Marco Rubio raised and spent about \$45 million (a \$35 million Democratic advantage). In the North Carolina US Senate race, Cheri Beasley raised and spent \$39 million—half of what Val Demings raised—while Beasley's GOP opponent, Ted Budd, raised and spent about \$15 million. Despite Cheri Beasley's fundraising advantage over Budd, there was a significant gap in outside group spending in the North Carolina race. In the end, GOP-aligned outside groups backing Ted Budd outspent Cheri Beasley's Democratic allies by \$50 million.

In the last two quarters of the 2022 election cycle, none of the top three North Carolina media markets (Raleigh–Durham, Charlotte, and Greensboro–Salem) surpassed \$1,000 for candidate or issue rate advertising—and those three media markets collectively contained 75% of the statewide vote, according to data from Big Al media. Meanwhile, all three of the largest media markets in Florida (Tampa, Orlando, and Miami) well surpassed \$1,000 in candidate and/or issue rate advertising over the last two quarters of the 2022 election—those three media markets collectively contained 64% of the statewide vote. Simply put, there is much more bang for a buck spent in North Carolina than Florida.

2022 US Senate Precinct Swings and Voter Turnout

Diving deeper into North Carolina’s midterm results, the state was indeed competitive and more than outperformed Democrats in Florida, where the red wave struck. The Florida governor’s mansion and the US Senate seat went for Republicans by 19 points and 16 points, respectively. Democrats have lost crucial hold on their Latino voting base in Florida, and they’ve failed to make up that ground with white college-educated voters in the state. Despite Democrats in North Carolina seeing a minor loss in support and turnout with Black voters, the inroads made with white college-educated voters kept the state competitive.

In 2022, North Carolina went for Republican Ted Budd in the US Senate race by 3.2 points. Looking at precinct level results, we see that from the 2020 presidential election to the 2022 midterms, majority Black precincts in North Carolina swung 2 points to the right, and majority white precincts swung less than half a percentage point right. Even as majority Black precincts swung 6 points right from the 2014 US Senate race to the 2022 US Senate race, majority white precincts in fact swung 1 point left in this time—a significant reason that North Carolina has remained in a status quo electoral state over the last decade.

	2020 Presidential to 2022 Senate Swing	2014 Senate to 2022 Senate Swing
Majority Black Precincts	R+2.4	R+5.9
Majority White Precincts	R+0.4	D+1.2

Source: Analysis of North Carolina State Board of Elections 2022 U.S. Senate precinct results & Dave’s Redistricting precinct results.



However, analysis from NC Newsline of the 2022 election cycle showed that North Carolina Democrats have not been immune to problems with mobilizing voters of color. There was a 6-point drop in turnout from Black Democrats in 2022 compared to 2018 and an 8-point drop among Black women—while white Democrats increased turnout this last cycle over 2018 and in fact surpassed the 61% turnout of white Republicans. In total, there was a 16-point gap in turnout between white and Black voters (an expansion since 2018 when the gap was 8 points and 2014 when it was 5 points). This turnout disparity will not solely be solved by moving into a presidential election cycle. Yet investment that spurs even marginal improvement in Black turnout may see Democrats succeed in flipping the state, as has occurred with demographically similar states in the sun belt.

North Carolina Demographics and Geographic Challenges

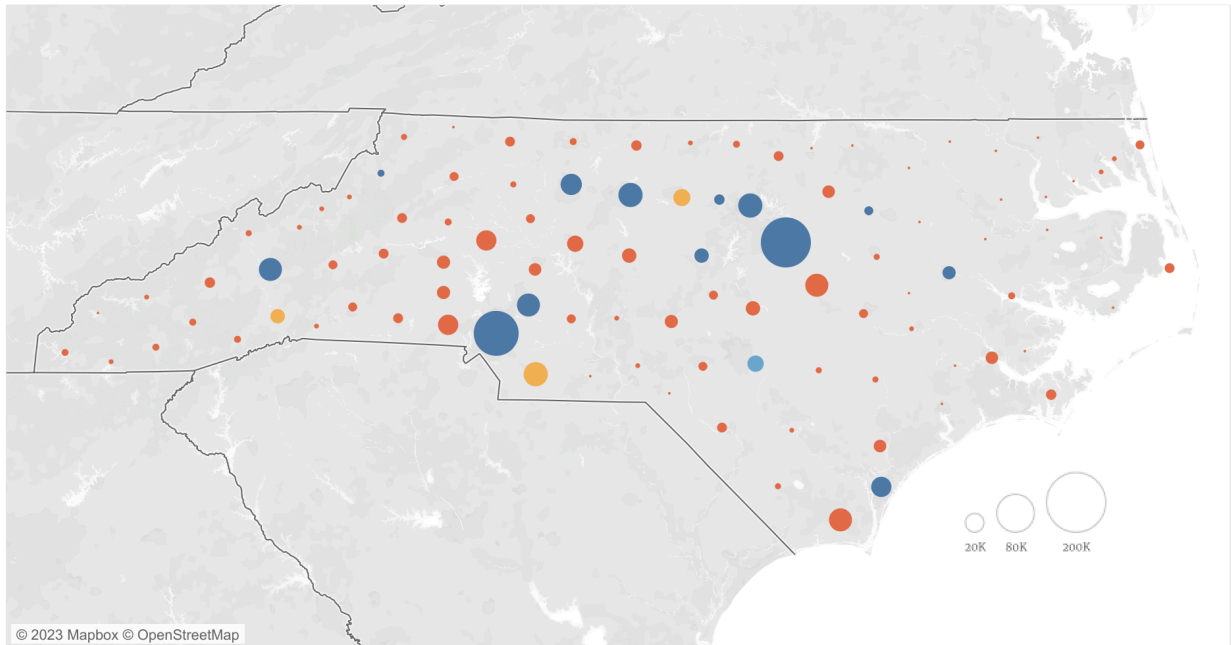
North Carolina is much closer to Georgia demographically than it is to any of the other battleground states, and the challenges that a successful Democratic coalition faces in the states are similar, but not identical. In 2020, Black voters made up 29% of the Georgia electorate and 19% of the North Carolina electorate—both Black electorates went for Biden by over 90 points, according to AP VoteCast data. Stacey Abrams and Georgia Democrats' strategy leading up to 2020 hinged on registering and activating enormous segments of Georgia's Black electorate (aided by the state's 2016 automatic voter registration law). Such a strategy has and will remain crucial in North Carolina, but if Democrats hope for Joe Biden to win the state, they must mitigate the exodus of rural and blue-collar voters as well. From 2008 to 2020, the western rural and exurban counties of North Carolina's Appalachia swung 12 points right, and Republicans netted nearly 50,000 more votes than Democrats over this time. On the other side of the state, the rural and small metro counties of the Black Belt, where a significant rural Black population resides, swung 6 points right from 2008 to 2020, and Republicans netted 17,000 more votes than Democrats over this time.

Democrats' saving grace in North Carolina has been capturing and retaining white college-educated voters in the era of the education realignment. An analysis of 2020 AP VoteCast data shows that North Carolina's white college-educated electorate is 4% larger than Georgia's, and the white non-college electorate is 8% larger. White voters' support for Biden was 9 points higher in North Carolina than Georgia—11 points higher among white college-educated voters and 8 points higher among white non-college voters. In 2020, white voters made up 58% of Biden's North Carolina coalition, compared to 38% in Georgia. Additionally, the five most college-educated counties in North Carolina (Orange, Wake, Durham, Mecklenburg, and Chatham) have collectively swung 10 points to the left since 2008, and Democrats netted 256,000 more votes than the GOP—a trend that is unlikely to subside.

North Carolina Presidential Election Vote Growth & Swings

Swings By County From 2008 to 2020 (head-to-head contest)

■ GOP Vote Growth & Swung Right
 ■ GOP Vote Growth But Swung Left
 ■ DEM Vote Growth But Swung Right
 ■ DEM Vote Growth & Swung Left



Note: Size of bubbles represents the growth in the number of votes (D & R) from 2008 to 2020 in the presidential head-to-head. 2020 presidential margins are the head-to-head results.
 Source: [NCSBE...](#)

Some have argued that because North Carolina has seen an influx of retirees into the state, this migration will negate any Democratic expansion in the metro counties and suburbs. But our analysis of US Census data shows that of the ten North Carolina counties that have seen the greatest percent increase in residents over the last decade—most being major metro counties and metro suburban counties—none of them have flipped party loyalty in presidential elections from 2008 to 2020. Four of these counties (Johnston, Brunswick, Currituck, and Iredell) have swung to the right, while the remaining six have swung towards Democrats since 2008. From 2008 to 2020, Democrats added 200,000 more votes than Republicans did in these ten counties—across all ten, there was a 7-point aggregated swing to the left.

Furthermore, the influx of retirees in North Carolina is nowhere near what Florida has seen in recent years. Florida reportedly saw 78,000 retirees move into the state in 2021, compared to 19,000 in North Carolina—but the overall influx of new residents in the Tar Heel state has not worked against Democrats in the aggregated vote as one might expect.

By comparison, the ten North Carolina counties that have seen the greatest percent decline in residents leaving over the last decade all swung to the right from 2008 to 2020. Republicans added 9,000 votes in these counties while Democrats lost 5,000—an aggregated 12-point swing to the right across ten counties. Democrats won eight of these ten rural counties in 2008 and five of them

in 2020. Democratic strength in these rural counties has certainly weakened, and they will need to adapt their messaging strategies to limit future losses—as appears to be a top priority for the new Democratic leadership in the state.

Conclusion

Joe Biden won 25 states in 2020, and the fundamentals favor the incumbent president for the time being. If Florida is no longer a viable swing state, then Democrats must adapt their strategy and investments. The priority is obviously to hold those states that flipped in 2020, but it should not prevent Democrats from investing in flippable states in 2024—and North Carolina is indeed the most flippable. A Democratic win there would take the wind out of Republican sails and significantly limit the GOP's path to 270, but only if Democratic donors and super PACs make the necessary investments in the state leading up to the election.

Correction: reference to Split Ticket's model was corrected to show it was a post-election calculation and not a pre-election forecast.

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