FORWARD MAJORITY

Macro Trends Shaping the Next Decade of Political Power in America

Introduction

Since our founding in 2017, we've mobilized ~$50M to compete in the most valuable state legislative terrain, focused on Texas, Arizona, Florida, Virginia, Pennsylvania, Michigan and Wisconsin. At the dawn of a new decade, with new maps and a new landscape, we wanted to take a rigorous look at the electoral map and how it might evolve — not just over an election cycle — but through 2030.

With that in mind, we undertook this analysis of macro trends shaping the next decade of political power in America, seeking to answer the following questions:

- How is partisanship in the states likely to change over the next ten years?
- Which states are consistently most competitive and central to national power? What factors will determine how competitive a state will be?
- What are the biggest threats to Democratic strength?

The insights from this analysis serve as a foundation for our work as we set priorities in the state legislative landscape, and our aim is for it to be a public good for our Democratic partners and allies across the board.

This project was led by Ethan Roeder, our Chief Innovation Officer, and Matt Lackey, a nationally recognized expert in campaigns, data science, and quantitative analysis. Our methodology was as follows:

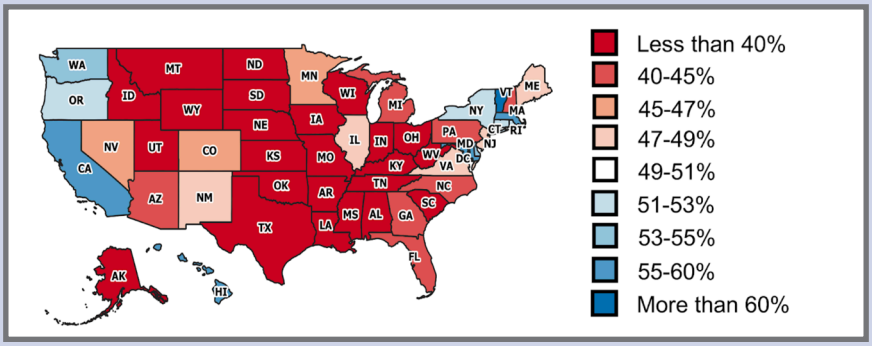
- **Built a demographic baseline of voter "subgroups"** (e.g., Black voters, non-college educated white voters, Native American voters), with data from ANES, Pew, Census, CDC, and IRS. We then incorporated partisan voting trends to ensure state projections reflect electoral context.
- **Ran projections through 90 different electoral scenarios** to gauge sensitives in different areas of the map based on partisan support and cohort participation. An example scenario is non-college educated voters' support rises by +5 points.
- **Received outside feedback ~40 experts** with program and analytics backgrounds invited to review the work and methodology.

Importantly, this analysis is just one way to look at the map. Any reading of the crystal ball is heavy with editorial assumptions. Ours include: (a) baseline national environment from 2012 to 2020 is D+2; (b) both partisan and demographic trends will continue as they have over the last decade; (c) migration trends will continue as they have over the last decade; coalitions of support (e.g. how Democratic each group is relative to other groups) are consistent with 2016; and (d) movers are disproportionately college-educated (by 2:1). ◆

Topline Insights

We anticipate a defensive map for Democrats over the coming decade. Democratic losses in bad years cut deeper than gains in good years. Simply put, as the maps below illustrate, Democrats' very good years still leave large swaths of the map red — and many of the battlegrounds that Democrats win are with razor-thin margins. In contrast, Democrats' very bad years are devastating routs: the map is overwhelmingly red, and battleground losses are with double digit margins. To illustrate this, below are simulated scenarios for 2030 in a very good and very bad years for Democrats.

Bad Year for Dems (Analogous to 2014)



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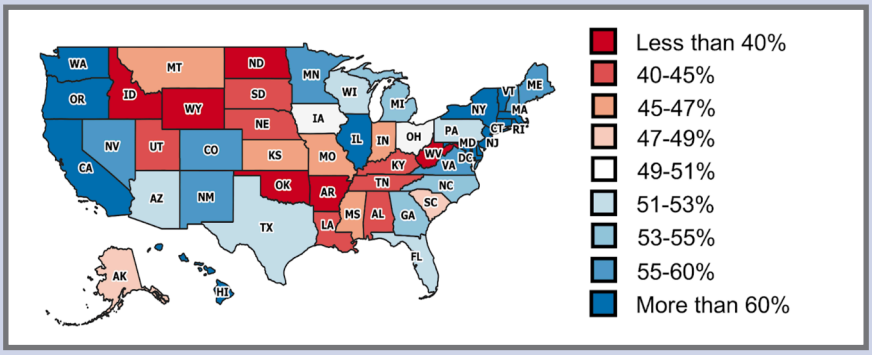


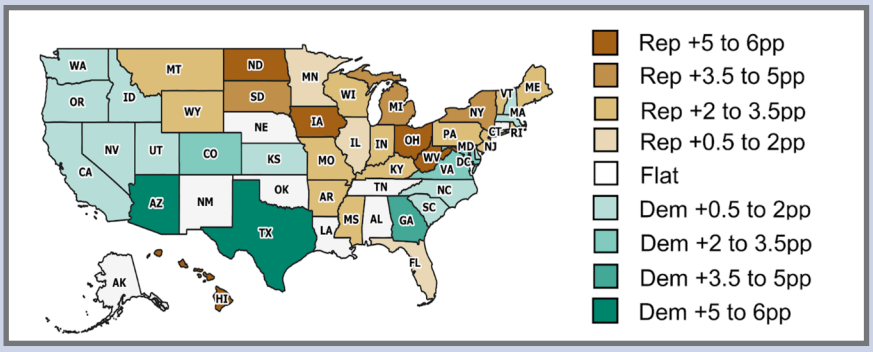
Demographic trends are a relatively small factor in a single election cycle going forward. Demographic trends are simply the maturation to voting age, mortality, and migration of individual subgroups (e.g., Black voters, college-educated voters, Asian American voters, etc) over time. While these are a much smaller factor in a single election, the changes accumulate over time and can transform a state over decades. We see these forces at work in Democrats' favor in a state like Texas, while other factors can work against electoral transformation from demographics, such as education polarization and migration in a state like Florida. The relatively small role of demographics is a departure from much of the narrative of the past decade: demographics as destiny, and the most significant force shaping the electoral map.

In contrast, we found by far the biggest factor in any single electoral cycle is the national mood. This makes for a very turbulent outlook. The national mood, also referred to as "uniform swing," is when the entire electorate swings due to macro factors like war, the economy or a pandemic. This is by far the most influential factor in deciding electoral outcomes for any given election. In a non-wave election, the battleground is fairly straightforward. But wave years have become increasingly frequent, and the degree to which Democrats need to pivot from offense to defense is dominated by national mood and these uniform electoral swings. Said differently, over the last seven years, we've seen over 10 percentage point shifts in uniform swing from a wave year like 2014 when Democrats lost almost everywhere to a wave year like 2018 where Democrats won almost everywhere. This is a function of national mood.

After national mood, the second biggest factor in an election year is "voter alignment," with voter subgroups changing their party or candidate support. For example, in the past decade or so, we've seen increasing education polarization, with more college-educated voters supporting Democrats, and more non-college educated voters supporting Republicans. Voter realignment can shift from cycle to cycle, and can result in long-term changes if realignments stick.

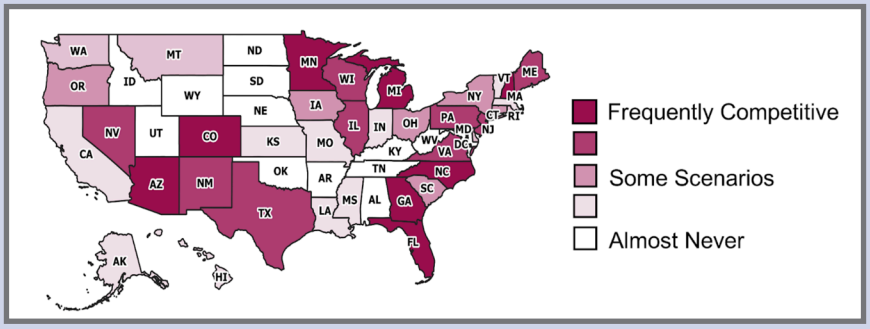
In terms of partisan trends, we see Democrats largely gaining ground in the Sun Belt and on the coasts, while Republicans pick up support over time in the Midwest and pockets of the Northeast. The green shaded states below are ones where we project Democrats will gain strength, while the brown states are ones where Democrats will lose ground. We project the biggest boost to Democratic performance to come in Texas, Arizona and Georgia, while Ohio, Iowa, North Dakota and West Virginia see the greatest deterioration of Democratic performance.

Projected Partisan Trends: 2020 to 2030



The electoral scenarios we ran largely reinforced the conventional wisdom on the most competitive battlegrounds. We were bearish on the competitiveness of the Rust Belt through the next decade, but were surprised to see it is likely to remain highly competitive through 2030. Meanwhile, the Sun Belt will continue to come online and be competitive for Democrats in good years. The Sun Belt continues to be Democrats' best opportunity for growth in performance, with time being a factor in our favor. In bad years, Democrats should also be prepared to defend some Western and Northeastern states.

Scenarios: Frequency of Competitiveness



Across the 90 scenarios we ran, the following categories of competitive states emerge:

- **Opportunities for growth:** AZ, TX, NC, GA — These states are trending Democratic and increasingly competitive.
- **Decade-long dog fights:** MI, PA, WI, FL — Right on the 50/50 line, trending Republican, perennially competitive.
- **Vulnerable to losing ground:** ME, MN, NH, NV, VA — In bad years these states become vulnerable, depending on the scenario.
- **Very bad years:** CO, IL, NJ, NM — In very bad years for Democrats, these states could also be captured by Republicans, as illustrated above.

We were eager to find hidden gems of potential Democratic performance on the map, but instead found a significant drop-off in performance after AZ, TX, NC and GA. We'd hoped to surface some states with real potential in various scenarios over the next decade. Unfortunately, beyond states like AZ, TX, NC and GA, where we see real opportunity in the next decade, we saw a big drop-off in Democratic performance in states like SC, OH or MT, where only a combination of factors including huge gains for Democrats combined with a very favorable national environment can make these states competitive.

What moves the needle? We saw the following sensitivities driving these scenarios:

- **Small changes of support within a large subgroup:** For example, non-college voters account for more than 65% of the electorate, so a 5% shift in this group, results in about a 3% shift across the whole electorate. In contrast, big changes in smaller subgroups, such as Asian American voters which account for 6% of the electorate, is a 0.3% change. This math can change, of course, in more diverse states or districts where voters that represent a minority elsewhere constitute a much larger share of the local electorate.
- **Non-college vote continues to play an out-sized role in many states:** The majority of the electorate is non-college educated, but this is not evenly distributed. Some states have high shares of non-college voters, while others have much smaller shares.
- **As a corollary, the trend of increasing education polarization, if it continues, will impact Democrats differently in different regions:** Education polarization will not be uniform across all states. There are different sizes of the college and non-college populations, and these populations vote differently depending on where you are in the country. For example, non-college whites in Oregon are more supportive of Democrats than they are in Louisiana. And, college-educated voters are more supportive of Democrats in New York than they are in North Carolina.
- **Marginal losses in support among voters of color:** Losing support among voters of color could quickly endanger Democratic strength in more diverse states.
- **Some states with similar compositions tend to move together under the same scenarios based on their characteristics and sensitivities:** We elaborate these groupings below. ◆

State & Regional Sensitivities

Arizona, Colorado & Nevada

- **Time favors these states:** Migration trends and demographic churn will move these states more Democratic in the next 10 years. All three states are in the top 10 for domestic migration.
- **Sensitive to support among Latino voters:** All three states have large Latino populations making them especially vulnerable to support levels.
- **Sensitive to non-college white support:** Non-college educated white voters still make up a huge proportion of the population in all three states.

Minnesota & New Hampshire

- **Relatively static trends:** Low migration and less diverse populations.
- **Low sensitivity to subgroup realignment:** Both states are overwhelmingly (90%+) white and have relatively high proportions of college-educated voters (40%+), making them less sensitive to subgroup realignment.
- **Vulnerable in bad years:** Both states are moderately safe in good years but become vulnerable even with modest uniform swing towards Republicans.

Georgia & North Carolina

- **Time favors these states:** Migration and demographic changes will push these states to become more Democratic and more competitive over the next 10 years.
- **Two most educated Southern states:** NC and GA are ~7% more educated than the rest of the South.
- **Room for growth among college-educated voters:** As noted above, Democratic support levels among college-educated voters are not as high as we see in Northern states; we are nowhere near the ceiling of support among college-educated white voters.
- **Sensitive to support among voters of color:** Both states have large, growing, and diverse populations of color.

Florida

- **Relatively static trend:** While Florida is particularly hard to predict, we expect it to remain highly competitive, as it trends slightly Republican over time.
- **Sensitive to education polarization:** Fewer than 1 in 3 Floridians holds a college degree. Changing support among non-college educated voters has a large impact, while gains among college-educated voters is far more muted.
- **Sensitive to support among voters of color:** Only 53% of Floridians identify as non-Hispanic white. Scenarios where support among people of color drops, even by a small amount in the case of Latino voters, make Florida less competitive.

Wisconsin, Pennsylvania & Michigan

- **These states are representative of the US as a whole:** Urbanity, education, and the percentage of people of color reflect national averages with population declines expected over the next decade.
- **Likely to remain highly competitive over the next decade:** Diverse populations across race/ethnicity, education, and urban/rural mix make these states subject to movement under numerous different scenarios.
- **But trending Republican over time:** People are continuing to leave, and those who leave are more likely to be college-educated and more likely to be Democrats.
- **Sensitive to non-college support:** Large non-college population wields out-sized influence.
- **Sensitive to support among voters of color:** Democratic strength is predicated on holding or growing support among voters of color in all three states.

Texas

- **Time favors Texas:** We expect the state to be +5 points more Democratic in 10 years, second only to Arizona in rate of improvement.
- **2nd fastest growing state:** Most international migrants are coming from Asia while the largest group of domestic migrants are from California; both groups strongly lean Democratic.
- **Sensitive to movement in support among voters of color:** Both broad movement in support levels among voters of color and movement only among Latino voters has a statewide impact on performance.
- **Room for growth among college-educated voters:** Like other Southern states, college White support is lower in Texas than in Northern states. ◆

Strategic Implications

This macro trends analysis of the electoral map is a tool we can continue to revisit and use to inform our work. In terms of big picture takeaways, a few of ours are:

- We, and Democrats, should invest in power-building in the Sun Belt so we can take advantage of good years when they come.
- Democrats should plan for what may seem like unreasonable defense, so we can be prepared for a very bad year and should take thoughtful approaches to early-warning signs of national mood.
- The importance of national mood on individual elections cannot be overstated. While there is much of this that is impossible to predict or control, Democrats should continue to seek ways to pierce the right-wing media

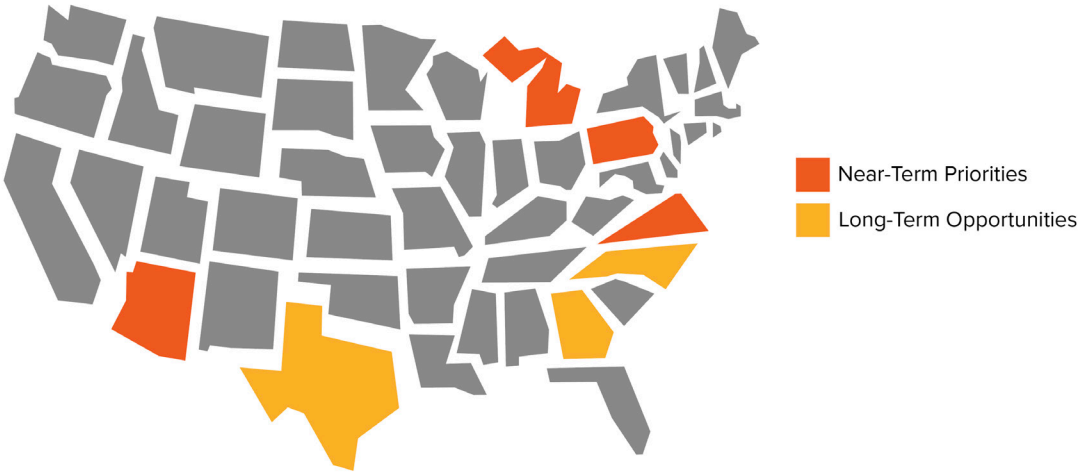
bubble that interprets and defines a narrative on macro events such as the state of the economy or a global pandemic.

What does this mean for state legislative priorities? In many ways, this reinforces the conventional wisdom, but, when married with our understanding of state level ecosystems and dynamics, allows us to zero in on our starting portfolio of investments.

- Gerrymandered maps may box us out of power in the Sun Belt until the latter part of this decade. Gerrymanders are sensitive to voter realignment, however, and lose their potency over time.
- Statewide wins (such as governor) may precede flipping chambers and should be seen as a strategic component of building power in a state.
- Better maps in Democratic-controlled states across the West, Midwest, and Northeast will put us on better footing for majorities in 2022, but they will need to be defended and bad years may put seemingly "safe" majorities in peril.

Forward Majority's Portfolio for Long Term Power-Building:

Our goal was to use this analysis to identify our starting portfolio for state legislative investments, in states that will be central to national power in these incredibly consequential times — not just in the next cycle, but through 2030.



As we marry this analysis with our experience and understanding of state legislative ecosystems, we have identified our initial priorities, illustrated above. This takes us back to focus on states we've worked in since our inception in 2017: Texas, Arizona, North Carolina, Pennsylvania, Michigan and Virginia, plus Georgia. These are all Republican-held legislatures which will be essential to national power and protecting democracy over the decade to come. As we have new maps in the new year, we will continue to share our plans and strategy.

Our hope is that this analysis can inform our partners', allies' and funders' view of the landscape and priorities for the years ahead. We welcome questions and feedback; please don't hesitate to reach out. ◆