



FORWARD MAJORITY

Ten Year Trend Report

Executive Summary

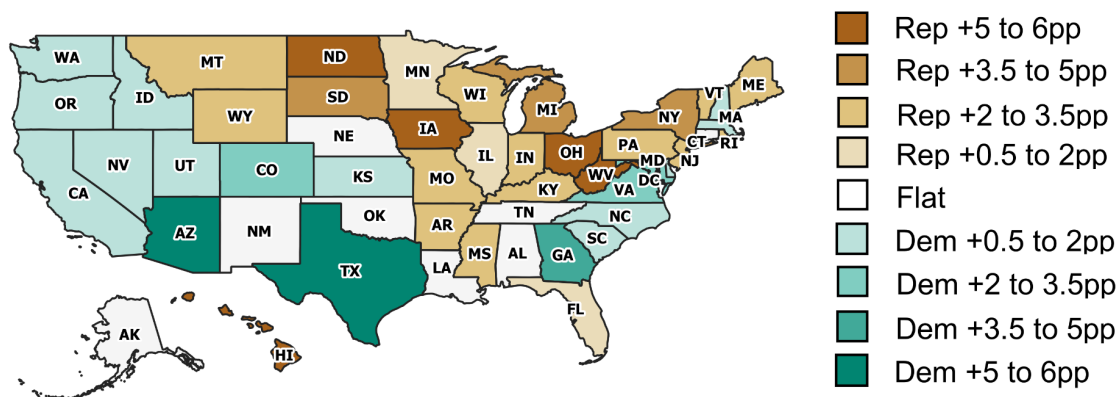
In the spring of 2021 we undertook a project of understanding the coming changes in the electoral landscape. The goal of this project was to identify places where Democrats may not be competitive right now and places that are competitive but may no longer remain so in 10 years. In short, we find that the coming decade will likely not see radical changes in which states are competitive without a large and unexpected change in political realignment, mortality, or migration.

For this analysis we varied four factors: national partisan mood (e.g. uniform swing), subgroup-level support for Democrats, subgroup-level participation rates, and migration patterns. We created 15 plausible electoral scenarios of subgroup-level support, subgroup-level turnout, and migration from a panel of experts. Each of these scenarios was analyzed across 6 levels of national partisan mood ranging from D+6 to R+6.

Our topline findings from this analysis show:

1. Cycle-to-cycle changes are dominated by national partisan mood (e.g. uniform swing.)
2. We expect that Democrats will fare better in sunbelt states at the end of the decade than they do currently;
3. We expect the Midwestern battleground states (notably MI, WI, PA) to remain competitive throughout the decade
4. We believe that Democrats should take a more defensive posture as years where partisan mood shifts toward Republicans are asymmetrically worse than years where partisan mood shifts towards Democrats.

Our analysis also provides a look at where Democrats will fare better or worse in the coming decades. The map below shows our projected changes in partisan support by state over the next 10 years:



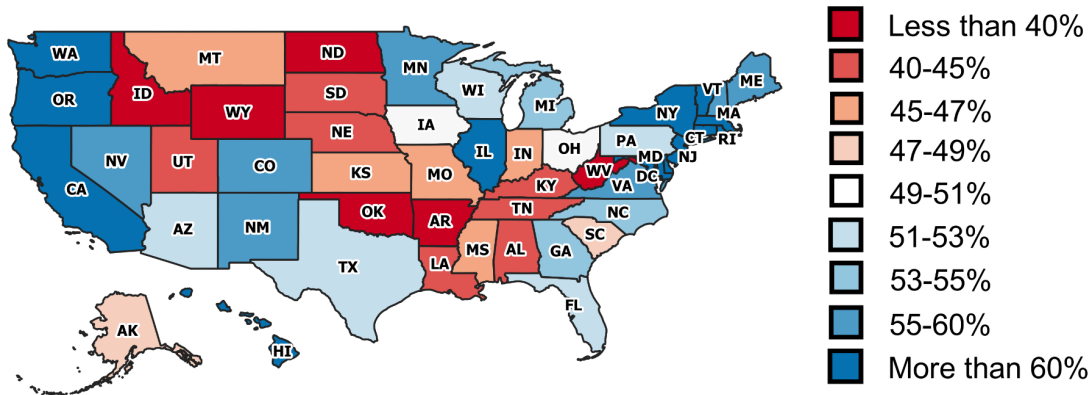
In the following sections, we explore each of these findings and provide state-level data to support these claims. We include methodology throughout the document to make more clear how we came to our conclusions.

National Partisan Mood

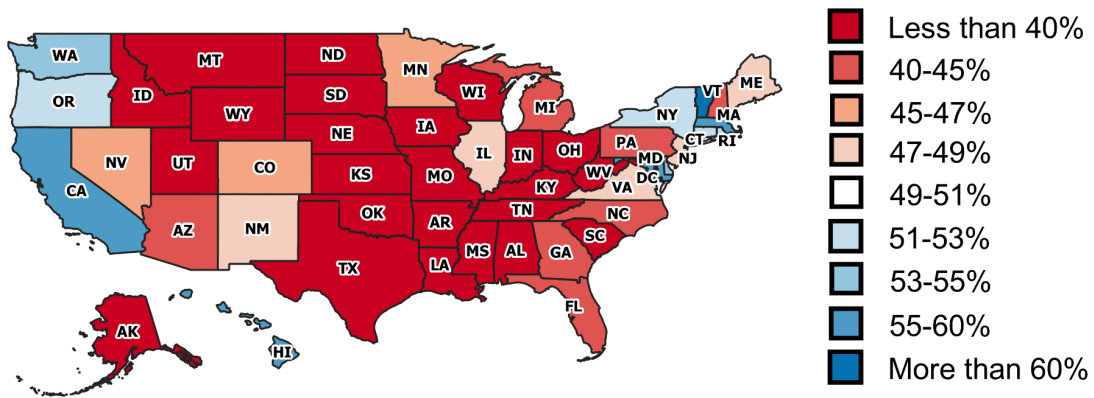
National partisan mood is the single most important factor in deciding the outcome of any given election. In the last four election cycles, we've seen two wave elections split between parties (2018 for Democrats and 2014 for Republicans.) Over the course of four years, Democrats went from capturing ~46% of the vote to capturing just over 53%-- a truly massive swing. Our analysis analyzes each of our curated scenarios against a wide range of these swings, ranging from D+6 to R+6 to determine how each of these scenarios play out in different partisan contexts.

One striking example of the effect of partisan mood on election outcomes emerges from looking at the expected 2030 electorate in a D+6 and an R+6 environment. This view helps us to understand how much any favorable demographic trends will put new states in play in good years or protect against losses in bad years.

The map below shows what a 2030 election (complete with young voters maturing into the electorate, older voters aging out of the electorate, and migration patterns consistent with 2010-2020) in a D+6 year. Democrats win in nearly every state that we consider to be a battleground, but notably the wins are not by large margins-- especially in traditional expensive battlegrounds like WI, PA, FL-- implying that even in good years, we'll be facing very competitive elections in traditional battleground states.



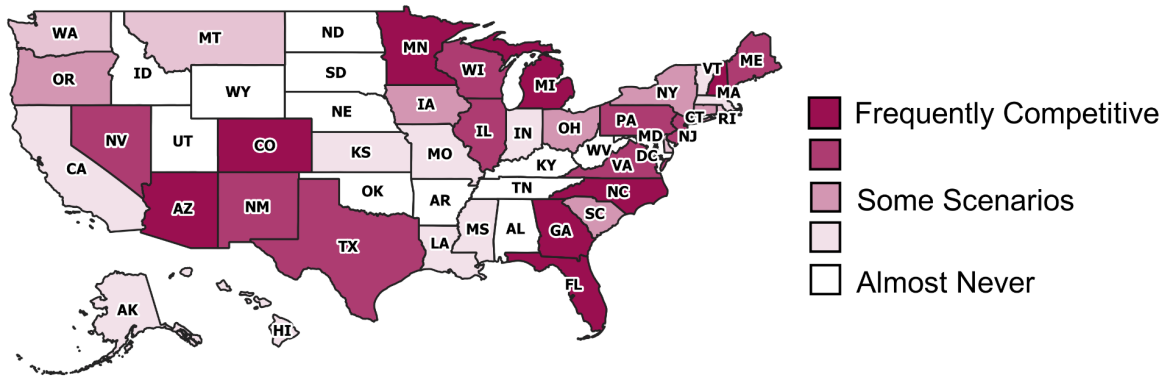
By contrast, this map shows what an election in 2030 would look like in an R+6 environment even after adjusting for all of the demographic changes to the electorate over the decade. We see that Democrats lose all of the traditional battleground states **and** Democrats lose by large enough margins that Republicans can efficiently spend in more aggressive states because they don't have to compete over traditional battlegrounds.



The strategic asymmetry highlighted by these maps can't be overstated. Wave years favoring each party are an inevitability and when Republican waves come, Democrats will need to play defense in states that are considered to be safe.

Competitive Landscape

Through this analysis, we were able to determine the frequency of competitiveness for each of the states across a wide range of favorable, unfavorable and mixed scenarios. The map below shows the frequency of competitiveness for all of the states. In this analysis we don't find any hidden gems of states that can come online under the right conditions-- states that have been competitive over the last several cycles make up the entirety of the competitive landscape. As mentioned above, we find that safe Democratic states are more likely to show up on this map than safe Republican states because of the asymmetry in our coalitions.



The table below shows our competitiveness metric for each state. This metric counts the number of times that a state is competitive across all 90 of our scenarios, giving significantly more weight to states where the partisan split is closer to 50/50 in the scenario:

State	Number of times within 10pp	Competitiveness	State	Number of times within 10pp	Competitiveness
NH	88	27.0	DE	23	1.9
GA	86	26.9	MT	22	1.8
NC	80	26.2	CA	29	0.8
MN	87	25.2	AK	18	0.7
MI	76	24.7	LA	1	0.4
FL	75	23.0	MA	13	0.4
CO	83	21.0	HI	19	0.3
AZ	66	20.8	VT	1	0.3
PA	64	18.3	MS	11	0.3
NV	70	17.9	MO	17	0.2
ME	69	16.6	IN	14	0.1
NM	75	16.5	KS	16	0.1
VA	73	16.2	UT	6	0.0
IL	78	16.0	AL	0	0.0
TX	57	14.9	AR	0	0.0
NJ	73	14.7	ID	1	0.0
WI	48	14.5	KY	0	0.0
SC	50	9.9	MD	11	0.0
CT	55	8.3	ND	0	0.0
OR	39	8.2	NE	2	0.0
NY	60	7.8	OK	0	0.0
IA	36	5.6	SD	0	0.0
OH	35	5.5	TN	2	0.0
WA	30	4.3	WV	0	0.0
RI	41	4.3	WY	0	0.0

Scenarios

Working with a group of experts, we developed 15 plausible electoral scenarios that may emerge over the coming decade. To note, there are **more** scenarios that reflect education realignment and Latino realignment as our experts indicated these were the two most likely outcomes

Scenarios favorable to Democrats

- Increase turnout among the “Rising American Electorate”: Increase turnout by 2% for voters under 35, and voters of color.
- Increase support among non-college and voters of color: Increase support by 5% among non-college voters and voters of color.
- Heavy sunbelt migration and increase in college support: All sun-belt states (AL, AZ, FL, GA, LA, MS, NC, NM, NV SC, TX) see 2% annual inflow and support among college educated increases by 5%.
- Older voters decrease in participation: Older voters turnout decreases by 5%.
- No changes: Migration patterns, support levels, and participation rates are held constant while younger voters age into the electorate and older voters age out of the electorate.

Scenarios favorable to Republicans

- Decrease support among voters of color: Uniformly decrease Asian and Latino support by 5% and decrease Black support by 2%.
- Decrease support among non-college voters: Uniformly decrease support among **all** non-college voters by 5%
- White and Non-college increase in participation: Participation rates among all white voters and all non-college voters increases by 5%
- Mild decrease in Latino support: Support among all Latino voters decreases by 2%.
- Severe decrease in Latino support: Support among all Latino voters decreases by 5%

Mixed scenarios

- Heavy sunbelt migration and education polarization: All sun-belt states (AL, AZ, FL, GA, LA, MS, NC, NM, NV SC, TX) see 2% annual inflow and support among college educated increases by 5% while non-college support decreases by 5%
- Increase among educated, decrease among voters of color: Support increases by 5% among college educated voters and decreases by 5% among voters of color
- Heavy sunbelt migration with decreased support among voters of color: All sun-belt states (AL, AZ, FL, GA, LA, MS, NC, NM, NV SC, TX) see 2% annual inflow and support among voters of color decreases by 5%.
- Support among voters of color decreases while participation increases: Support among voters of color decreases by 5% (still favoring Democrats among all groups) while participation among all voters of color increases by 2%.
- Latino participation up, support down: Support among Latino voters decreases by 2% and participation among Latino voters increases by 2%.

State Toplines

The table below describes the expected year-over-year change in partisanship for each state. We calculate year-over-year change by combining changes in the composition of the electorate (movers, maturation, mortality) and longer-term realignments that have taken place (e.g. urban voters becoming more democratic-leaning.) We find that most year-over-year changes are quite small with more than half of the states expecting to see even a 2 percentage point change from composition over the course of a decade. Large changes favoring Democrats occur mostly in the sun belt and on the coasts, while large changes favoring Republicans occur mostly in the Midwest.

State	Year over Year Change (2012 to 2030)	State	Year over Year Change (2012 to 2030)
AZ	0.63%	CT	-0.04%
TX	0.50%	FL	-0.05%
GA	0.39%	MN	-0.14%
CO	0.34%	IL	-0.15%
MD	0.30%	VT	-0.16%
VA	0.28%	NJ	-0.17%
UT	0.22%	MT	-0.17%
DE	0.20%	AR	-0.17%
WA	0.19%	MS	-0.18%
MA	0.19%	WY	-0.19%
OR	0.16%	PA	-0.20%
KS	0.15%	KY	-0.22%
CA	0.13%	WI	-0.25%
NV	0.13%	MO	-0.28%
NH	0.12%	IN	-0.28%
NC	0.12%	ME	-0.30%
SC	0.11%	RI	-0.34%
ID	0.07%	NY	-0.37%
NM	0.01%	MI	-0.38%
AK	0.01%	SD	-0.41%
LA	0.00%	WV	-0.47%
AL	-0.03%	OH	-0.48%
NE	-0.03%	HI	-0.52%
OK	-0.04%	ND	-0.55%
TN	-0.04%	IA	-0.65%

Movers

The table below describes the year-over-year inflow of new residents for each state. We calculate this using a weighted average of the 10-year historical migration average and the 1-year migration for 2019. We understand that there are myriad reasons for these migration patterns to change (move to remote work, climate migration, etc.) but wanted to make sure that the increasing urbanization and moves to both the West and the South were captured in our 10-year projections.

State	Historical 1-Year Flow		State	Historical 1-Year Flow
ID	1.66%		IN	0.04%
NV	1.54%		NM	0.02%
AZ	1.23%		RI	0.02%
SC	1.05%		AR	-0.01%
DE	0.93%		KY	-0.03%
CO	0.86%		KS	-0.08%
MT	0.80%		MN	-0.09%
ND	0.73%		IA	-0.11%
NC	0.66%		WI	-0.12%
OR	0.66%		NE	-0.13%
FL	0.60%		PA	-0.15%
NH	0.59%		OH	-0.20%
WY	0.57%		MD	-0.27%
WA	0.56%		MS	-0.31%
TN	0.55%		WV	-0.31%
UT	0.54%		MA	-0.37%
ME	0.47%		AK	-0.40%
GA	0.45%		CT	-0.40%
SD	0.27%		MI	-0.41%
TX	0.25%		HI	-0.43%
VT	0.19%		NJ	-0.55%
OK	0.15%		LA	-0.61%
VA	0.12%		CA	-0.64%
AL	0.11%		IL	-0.80%
MO	0.05%		NY	-0.93%

Methodology

Below we describe the specific steps we took to calculate out each element of our analysis. To perform any kind of future-casting, many editorial decisions need to be made and we want to be clear about which choices we made.

Estimating State and subgroup level populations:

Population estimates were taken from the 2019 American Community Survey. Subgroup populations were estimated by multiplying out population shares for each demographic and assuming uniformity across demographics (e.g. if 70% of the population in a state is white, 50% are women, and 20% are under 35 years old, then we estimate that 7% of the population are made up of white women under 35.)

Estimating Mortality:

Mortality estimates were constructed using the CDC's mortality estimates for age, race and gender. Subgroup level estimates were calculated in the same fashion as population by multiplying out mortality rates.

Estimating participation:

In lieu of calculating registration and turnout separately, used participation rates from the 2017 American Community Survey. These estimates reflect participation in the 2016 election. We use the same method described above to calculate subgroup level participation rates.

Estimating partisanship:

We calculate partisanship by using Pew's 2017 post-election analysis for relative subgroup levels of two-way partisan preference by age, race, and educational attainment. We then adjust support levels by state for each subgroup to match the 2020 election results in a D+3.5 year.

Handling college-educated voters:

Instead of applying a uniform bonus to college-educated voters, we applied a relative bonus that accounts for state-level partisan dynamics. That means that in states where college-educated voters are overwhelmingly Democratic, the college bonus is large; in states where Republicans do better, the college-bonus is much smaller.

Movers partisanship:

We know that people who move are more likely to vote for Democrats than their neighbors, tend to be younger, and tend to have higher openness to experience. We also know that there is a great geographic realignment happening right now, where urban areas are becoming more Democratic and rural areas are becoming more Republican. To handle this we piggyback on our college solution and assume that $\sim\frac{2}{3}$ of movers are college educated. We do know that movers are more educated and this captures both the regional dynamics of partisanship and moving and gives a bonus as movers score higher on openness (which is strongly correlated with voting for Democrats).

Calculating scenarios:

For each scenario, each change is independent and cumulative. That means that when we increase the non-college vote by 5 percent, we are increasing the two-way Democratic vote share of every group by 5 percent over their baseline. In the event that we change two groups that aren't mutually exclusive, the change will be cumulative. In the case where we increase non-college vote share by 5% and POC support by 5%, non-college voters of color are getting a 10% increase in their chances of voting for a Democrat.