

MACRO TRENDS SHAPING THE NEXT DECADE OF STATE LEGISLATIVE POWER IN AMERICA

EXECUTIVE SUMMARY

Earlier this year, Forward Majority set out to do something that Democrats rarely do: think strategically about long-term power-building. We conducted a robust quantitative forecasting analysis of macro trends to understand the state legislative districts that are likely to be the ‘tipping points’ that determine majorities in 2030. The playing field is very clearly defined: ~85 largely suburban, Republican-leaning districts across MI, PA, AZ, VA, TX, GA and NC will likely be the tipping point of state legislative power in 2030. Winning these tipping point districts in 2030 will not be easy: if that election year is a Republican-leaning or even neutral environment, we may not win the majority of these chambers. The key for Democrats is to exploit opportunities at the district level that have not been systematically pursued, which can build advantage and shape the electorate over time, for example voter registration to capture the opportunity of 2.2 million unregistered likely Democratic voters in these districts. Overall, the battlelines are very clearly defined, and there is a opportunity if we pursue the multi-cycle investments that can make the biggest difference.

INTRODUCTION

Context

Since our inception in 2017, Forward Majority has been at the frontline of the fight for power for Democrats in state legislatures that have the biggest impact on national power and democracy. We’ve mobilized more than \$60M to this effort, and have been driving progress in tough but essential terrain.

At the start of this decade, we have endeavored to do something that no individual campaign and very few political actors on the left do: **think strategically about building power over time**. It is possible to make smart decisions now that help us to win seats and majorities in the decade ahead. But very simply put: strategy and investments that are optimized for November of 2022 or 2024 – are inherently different from those that are optimized for 2028 and 2030. The latter is what Republicans have been doing for decades.

With that in mind, we have undertaken a two-part analysis to identify the terrain that is most likely to determine the balance of power in the most important state legislatures in 2030. [Part I of this analysis focused on the macro trends shaping the next decade of political power in America](#). Through a series of 100+ scenarios, we assessed how partisanship across the 50 states is likely to change over the next ten years, which factors will determine how competitive a state will be, and where the biggest threats and opportunities lie for Democrats.

The results of this analysis have allowed us to zero in on key priority states for state legislative power-building: Texas, Arizona, Georgia, North Carolina, Pennsylvania, Michigan and Virginia. Each of these states is consistently competitive across scenarios - and thus a lynchpin of national power. Each of these states has a path to a Democratic majority in at least one chamber by 2030. The competitive chambers in PA, MI, AZ and VA will continue to be competitive throughout the decade, and Democrats need to keep fighting for them all decade long. In TX, GA and NC, we need favorable scenarios in order to win; the chambers will not be competitive even in a neutral, toss-up year in 2030.

What follows is Part II of this analysis, **focused on how macro trends are likely to shape the path to win and defend Democratic majorities in key state legislatures through 2030**. We've run these same scenarios within the districts of newly drawn state legislative maps in our target chambers.

Authors & Methodology

This project was led by Ethan Roeder, Forward Majority's Chief Innovation Officer, and executed by a small team of consultants in data science.

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 105 different electoral scenarios on new district maps.** We aimed to understand:
 - How will partisan trends play out differently in different districts?
 - Is a chamber even in play in 2030? How strong would the environment need to be for Democrats to have a chance to win a chamber in 2030?
 - Which districts are the "tipping point" - most likely to determine control of a chamber in a winning year? Which voter cohorts hold the most sway in these districts?
- **Received outside review via ~40 experts with program and analytics backgrounds** invited to review the work and methodology of scenarios and approach.

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).

This analysis is not meant to be static. It will be updated every cycle in order to be as accurate as possible. If we see a dramatic realignment among groups in our coalition, we will likely have different conclusions. For example, after the 2022 election, certain electoral shifts among Black and Hispanic voters will be analyzed to see if the movement was part of a brief phenomena, or if it is part of a larger trend.

TOPLINE FINDINGS

Overall, Democrats face a defensive outlook over the decade ahead.

As detailed in Part I of this analysis, Democrats face a defensive outlook for the decade ahead. Good years for Democrats are ones in which power will come down to razor-thin margins; in contrast, good years for Republicans will be routs.

At a statewide level, Democrats have a very clearly defined playing field for growth over the next decade. Texas, Arizona, Georgia and North Carolina – and that's it.

The opportunities for growth for Democrats are non-controversial, and are exclusively in Texas, Arizona, Georgia and North Carolina. These four states are all trending in Democrats' direction and were consistently competitive statewide by 2030 across the range of scenarios we ran. We were pleasantly surprised to see that despite the rust belt battleground states trending away from Democrats, they are very likely to remain competitive through 2030. It will be a dogfight for power - but they remain winnable in good years.

In contrast, Republicans have more states where they can be on the attack and growing over the decade ahead, from the Rust Belt (Michigan, Pennsylvania, Wisconsin, Minnesota, Illinois) to the Northeast (Maine, New York) and beyond (e.g., Florida).

Across these states, there is a set of state legislative chambers that will be competitive by 2030 if not earlier.

These include the MI Senate & House, PA House, AZ House & Senate, all of which have paths

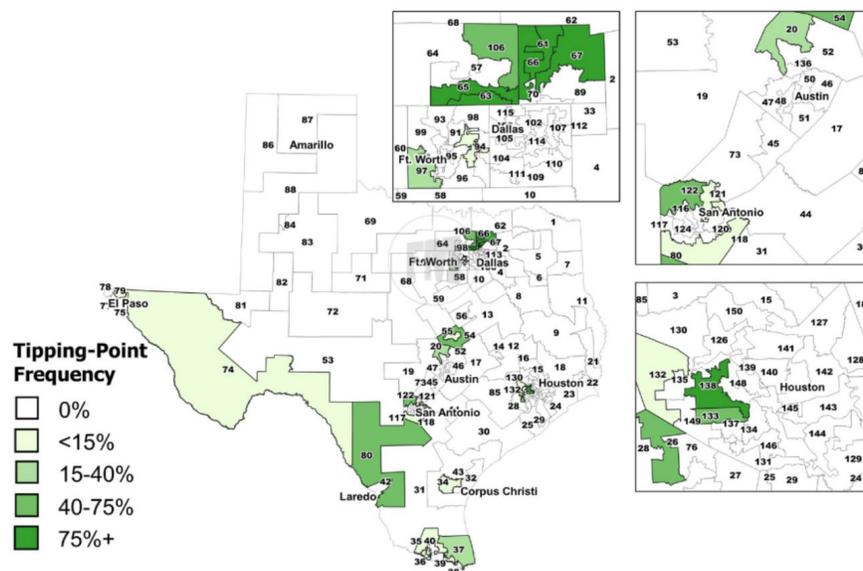
to a Democratic majority by 2024, and the TX House, GA House, NC House, with gerrymandered maps we expect to decay over time (or potentially redrawn). As GOP-controlled legislatures have become home to proto-facists, if not outright fascists, undermining the free and fair elections that are the foundation of democracy – winning control of these chambers is essential. These are also where the battle for reproductive rights, gun control, climate change - and every critical issue of our time - will be fought.

Chamber control in 2030 comes down to ~85 “tipping point” districts.

By running these more than 100 scenarios of partisanship and levels of support among cohorts of voters at the district level, the battlefield becomes clearly defined. This handful of ~85 “tipping point” districts are those that appeared most frequently in the scenarios as the final majority-making districts to flip or hold the chamber. Considering the fact that there are more than 7,000 state legislative seats nationwide, this is a mere ~1% of all seats. **Knowing where these lie, and continuing to refresh this model, unlocks our ability to spend money productively now – for future power.**

In chambers with gerrymandered maps, the tipping point districts are often counterintuitive and not necessarily those that are most competitive today. This analysis has allowed us to effectively reverse-engineer the Republican gerrymanders in the TX House, GA House and NC House to understand the turf they chose to compete on. The tipping point districts for chamber control at times are those that Biden won by 10 points, and other times, ones he lost by 10 points, depending on how the macro trends express themselves at the district level. Often these are not competitive targets for 2022 or 2024, or potentially even 2026 or 2028. Below we illustrate the tipping point districts in 2030 for control of the Texas House with those in dark green appearing most frequently in our scenario analysis. In the Texas House, there are 12 high probability tipping point districts, which appear in 40% or more of the scenarios we ran. In the GA House, there are 14 most likely tipping point districts, and in the NC House, there are 17. These are the whole

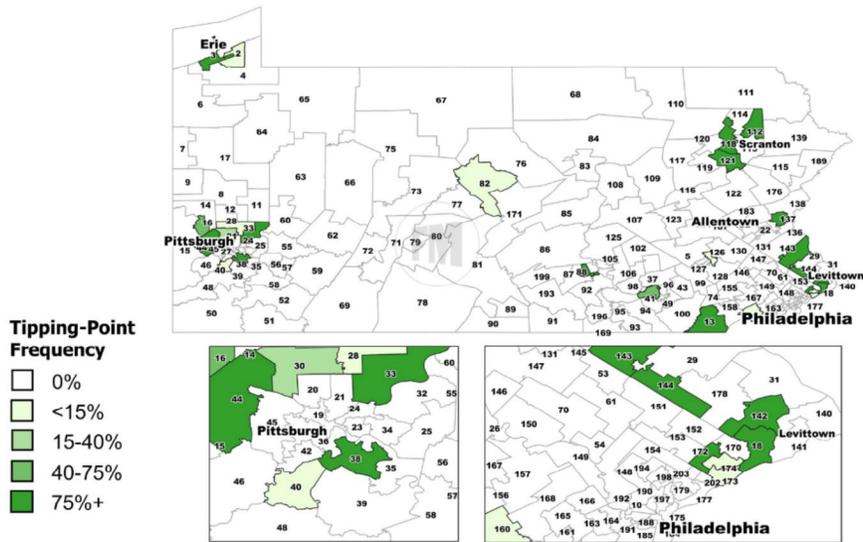
TX Texas State House: Tipping-Point Districts



In state chambers with fairer maps, the tipping point districts in 2030 are nearly identical to those that are competitive now.

For example, in the Pennsylvania House, the 17 likely tipping point districts we’ve identified for 2030 mirror those that are key targets for chamber control in 2022/2024: clusters of competitive districts in the suburbs of Pittsburgh and Philadelphia, with a few scattered targets near Erie and Scranton. The story in the Michigan House and Senate is very similar. Winning and defending these 17 likely tipping point districts in the PA House, 7 in the MI Senate, 11 in the MI House, and 5 LDs in the AZ legislature will be the key for chamber control through 2030 across these legislatures. Below, we highlight in dark green the districts that most frequently show in our scenarios as the tipping point for the PA House.

PA Pennsylvania State House: Tipping-Point Districts



The tipping point districts are almost all in the suburbs. They tend to be whiter, more conservative, with higher shares of college-educated voters.

The tipping point districts in each of our targeted chambers vary based on the distribution of voters, the partisanship of the state, and the design of the maps. The table below shows how the tipping point districts differ from the rest of the districts in a chamber by demographic composition. In sharply gerrymandered chambers such as the TX House and the GA House, these numbers reveal clear efforts to entrench competitive terrain that is much more white than the state as a whole. Every gerrymander has trade-offs, however, and in this case we see that the districts that are most likely to determine control of the chamber are also somewhat more college-educated, which could provide room for growth for Democrats if education polarization continues to increase. These competing dynamics are just one of many variables we explored in the scenario analysis.

Demographic Composition of Tipping Point Districts vs. the Average in a Chamber

Demographic	GA						
	AZ Leg.	House	MI House	MI Senate	NC House	PA House	TX House
Black	-1%	-11%	-5%	-4%	7%	-4%	-3%
Latino	-2%	-1%	0%	0%	0%	-1%	-6%
White	4%	10%	4%	4%	-6%	6%	7%
Asian	1%	2%	0%	1%	-1%	-1%	2%
Other	0%	0%	0%	0%	0%	0%	0%
College	4%	9%	3%	3%	-3%	4%	8%

*Positive numbers indicate that the demographic is more represented in the tipping point districts; negative numbers indicate the group is less represented. AZ Leg is for both the House + Senate, whose districts precisely overlap.

None of this is easy. It is a steep climb to flip and/or defend these chambers. Flipping seats is not our goal; winning Democratic majorities is the path to transforming power dynamics in our country and fortifying democracy. This is not an easy path; if it were, Democrats would not be wholly out of power in every single legislature in every single major battleground state – even as they win a trifecta of power nationally

and gubernatorial seats in some of these very same key battleground states. To understand the path and potential, below we outline the 2030 expected Democratic performance of the average tipping point district in a “neutral year,” effectively a toss up for Democrats and Republicans.

In zero of these state chambers does partisanship favor Democrats in the median tipping point district; they are all <50%, meaning Republican-leaning. With this in mind, we have articulated the Democratic swing required to flip the chamber – essentially, how strong a year it would need to have a shot at winning the tipping point districts. As you’ll see below, we can likely win/hang onto the AZ House and Senate and the NC House in the year 2030 in an environment that leans ever so slightly Democratic (+1%). We’re not far behind with the MI Senate and the PA House (both at +2%). From there, the path gets tougher: the MI House and PA Senate require a +3% environment for Democrats; the TX House is a +4%, and GA House is a +5%.

The bottom line is these districts are the fulcrum for Democratic majorities – and we need to be well-positioned in a strong year to win/hold them.

2030 Partisanship of Tipping Point Districts + Required Swing to Flip Chambers

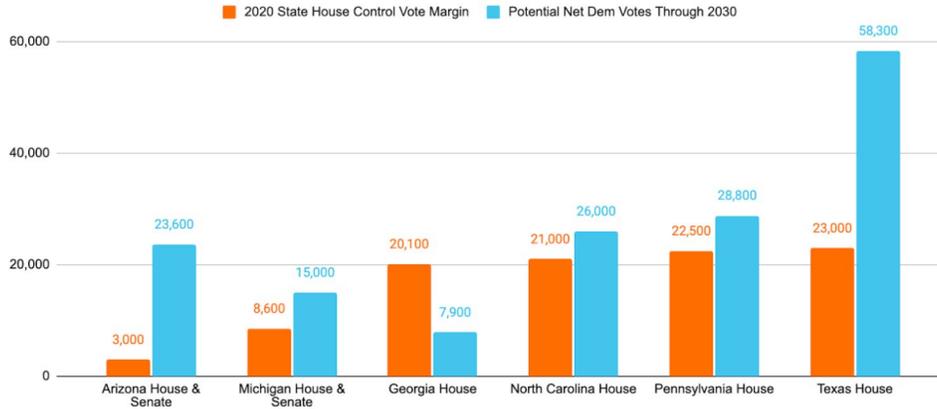
State Chamber	Seats representing a majority	2030 Dem. performance of majority-making pivotal seat in a neutral year	Dem Swing Required to flip chamber
AZ House + Senate	16	49%	+1%
NC House	61	49%	+1%
MI Senate	20	48%	+2%
PA House	102	48%	+2%
MI House	56	47%	+3%
TX House	76	46%	+4%
GA House	91	45%	+5%

The question becomes: how do we accelerate Democratic performance in these tipping point districts? Given the defensive electoral map Democrats face for the decade ahead - and war being waged on democracy - this is essential work. Understanding the playing field allows us to make strategic choices now about where and how to invest. Fundamentally, winning requires finding ways to shape the electorate and shift the partisanship of these districts over time, and aggressively competing to ensure we are winning down-ballot as Democrats win these very same districts at the top of the ticket (a chronic issue we’ve observed through our work to date in these types of tough, tipping point districts).

This is exactly what our 10-year strategy, *Blueprint for Power*, seeks to do.

In response to these chronic down-ballot lags in tipping point races that are essential for Democratic majorities, we launched a [10-year strategy](#) earlier this year, with three pillars of investment focused on these tipping point races. We’ve identified more than 2.2 million unregistered likely Democratic voters in these state legislative battlegrounds, and have launched a set of promising pilot programs this year to build out this new frontier of voter registration. For a variety of reasons, the overwhelming majority of voter registration efforts on the left fail to reach the heart of the state legislative battleground, and these voters are not being systematically targeted. In addition to voter registration, these are also the races that tend to suffer from chronic under-investment, and where we are targeting our long-term persuasion programs to build a narrative with key segments of voters in these districts over time, using a combination of owned, earned and paid media, and where we will continue to target our campaign programs to persuade and turnout voters to win close races. As an illustration of the impact of voter registration programs, below is the number of net Democratic votes we anticipate adding in tipping point races across these chambers vs. the voter margin in tipping point races that allowed Republicans to hold onto these chambers in 2020.

Potential to Shape the Electorate through Targeted Voter Registration



The battlelines are clear: this is where power lives in America.

This analysis is intended to demystify winning power in the decade ahead. Democrats can continue to fixate on the presidency and federal government, and it makes sense – those are the sexier contests, and they are more straightforward than the state by state fights. But without power in state legislatures we will continue to struggle to hold back the worst threats to democracy, and only win enough power to hold on until the next fight - not enough power to make real change. The opportunity space is narrow and clear, both at the state level and in the state legislative battleground. We didn't pick this fight; it's not easy. But sitting this fight out isn't an option. The only option is to build power in the states and legislatures that are the lynchpin to hold back the worst threats to democracy, and to be able to make progress moving forward.