FORWARD MAJORITY

2026 TIPPING-POINT DISTRICTS

ELECTORAL TRENDS THROUGH 2030

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Model outputs and methodology can be found here

Since 2021, Forward Majority has published projections of electoral trends at the statewide and state legislative district level. These trends are informed primarily by demographics:

- **Maturation:** *Using Census ACS data we estimate the racial and ethnic composition of young people who will age into the electorate (in this case over the next five years).*
- **Mortality:** *CDC data gives us mortality rates by race/ethnicity, age, and gender.*
- **Migration:** *Census ACS data allows us to estimate the composition and volume of both in-migration and out-migration, including where movers are coming from.*

These factors, combined with estimated partisanship from the voter file and AP VoteCast, allow us to create baseline 5-year trends. Partisan behavior within demographic groups is frozen for this baseline projection. The next step is to game out real-world electoral scenarios. Some examples:

- **Age 18-34 +5pp:** *A favorable scenario for Dems. Youth support surges by 5 points.*
- **Hispanic & Asian -5pp; Black -2pp:** *An unfavorable scenario. Racial depolarization accelerates.*
- **College Educated +5pp; High School Only -5pp:** *A mixed scenario. Education polarization accelerates.*

We run these voter alignment scenarios (82 of them) in seven different electoral environments ranging from Republican wave years (R+6) to Democratic waves (D+6). Combined, these 574 electoral scenarios provide us with a range of outcomes and a way to quantify the likelihood that a district will be competitive in 2030.

Districts our model expects to be highly competitive in scenarios where majority control of a chamber is in play in 2030 are called “tipping-point” districts. These may or may not be the same districts that are competitive today. That’s the value of our model: it’s an informed way to plan ahead.

Projected Chamber Competitiveness in 2030

State Chamber	2030 Dem Win Probability	2030 Tied Chamber Probability	2030 Dem Baseline of Majority-Making Seat	Dem Swing Required to Flip Chamber	Summary
VA House	95%	2.6%	55.0%	**−5.0%**	Threatened only in R+4 or worse environments, especially when support drops among Black voters, with further exposure among college-educated voters.
VA Senate	91.7%	3.3%	55.8%	**−5.8%**	Same competitive dynamics as VA House
NV House	78.6%	2.8%	52.6%	**−2.6%**	Competitive in favorable years for Republicans (R+4 or worse), especially when support drops among Latino voters, with further exposure among Asian voters.
NV Senate	77.7%	0%	52.8%	**−2.8%**	Same competitive dynamics as NV House
ME Senate	57.1%	0%	50.4%	**−0.4%**	Competitive across plausible scenarios, especially when the race turns on non-college voters.
MI Senate	54.4%	1.7%	50.4%	**−0.4%**	Competitive across plausible scenarios, especially when the race turns on white voters.
MN House	49.7%	2.9%	49.9%	**+0.1%**	Competitive across plausible scenarios, especially when the race turns on white and college-educated voters.
WI Senate	48.1%	0%	49.7%	**+0.3%**	Competitive across plausible scenarios, especially when the race turns on white voters.
MI House	42.4%	2.6%	49.9%	**+0.1%**	Same competitive dynamics as MI Senate
ME House	40.8%	0%	48.7%	**+1.3%**	Competitive across virtually every plausible scenario; the outcome turns more on the national environment and turnout than on any single cohort.
MN Senate	40.2%	0%	48.7%	**+1.3%**	Same competitive dynamics as MN House
PA House	39.9%	0%	49.0%	**+1.0%**	Democrats have a realistic path in D+4 or better environments, especially when support holds among Catholic and white voters.
NH House	34.2%	<1%	49.0%	**+1.0%**	Democrats have a realistic path in D+2 or better environments, especially when support holds among college-educated voters.
WI House	32.6%	0%	48.3%	**+1.7%**	Democrats have a realistic path in D+4 or better environments, especially when support holds among white voters.
AZ Senate	23.9%	14.1%	47.9%	**+2.1%**	The chamber is competitive under virtually every scenario tested -- 96% of conditions land in the competitive band. Democrats have a realistic path in D+4 or better environments, especially when support holds among Latino voters.
AZ House	23.3%	14.2%	47.9%	**+2.1%**	The chamber is competitive under virtually every scenario tested -- 98% of conditions land in the competitive band. Democrats have a realistic path in D+4 or better environments, especially when support holds among Latino voters.
PA Senate	21.5%	8%	47.8%	**+2.2%**	Same competitive dynamics as PA House
NH Senate	8.7%	15.1%	46.1%	**+3.9%**	Democrats would need a D+4 or better environment combined with stronger support among college-educated voters.
TX House	7.6%	1.6%	45.4%	**+4.6%**	Democrats would need a D+4 or better environment combined with stronger support among Latino and college-educated voters.
GA House	7.4%	1.3%	45.6%	**+4.4%**	Democrats would need a D+4 or better environment combined with stronger support among college-educated and Black voters.
NC House	2.9%	<1%	45.2%	**+4.8%**	Democrats would need a D+4 or better environment combined with stronger support among Evangelical and Black voters.

Aggregating the model at the chamber level gives us visibility into the competitive landscape through the rest of the decade. While there’s a large competitive field for state legislative chambers, the opportunity is well-defined and fairly stubborn due to pervasive gerrymandering.

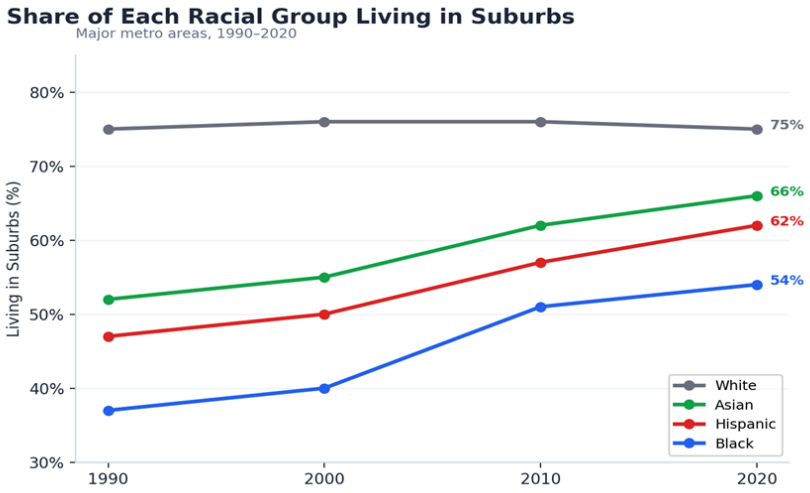
This analysis does light a path for Democrats in chambers we might otherwise write off, though, such as the GA House and TX House, where dynamic populations create avenues, albeit narrow ones, for Democrats to secure a majority towards the end of the decade. In AZ these forces have already positioned both chambers (more fairly drawn than in other states) to be highly competitive.

To state the obvious, we should not assume we'll be competing on the same maps in 2030 that are in use today. While the post-Callais environment is only just beginning to shake out what's already clear is the gutting of section 2 will embolden Republican-led states to redraw any map at any time to improve their odds. Assessing likely long-term trends is a difficult and treacherous task but undertaking it is not optional. If Democrats want to have power in America again we need to start imagining a political playbook that extends beyond 2 years.

Opportunity Areas for Democrats

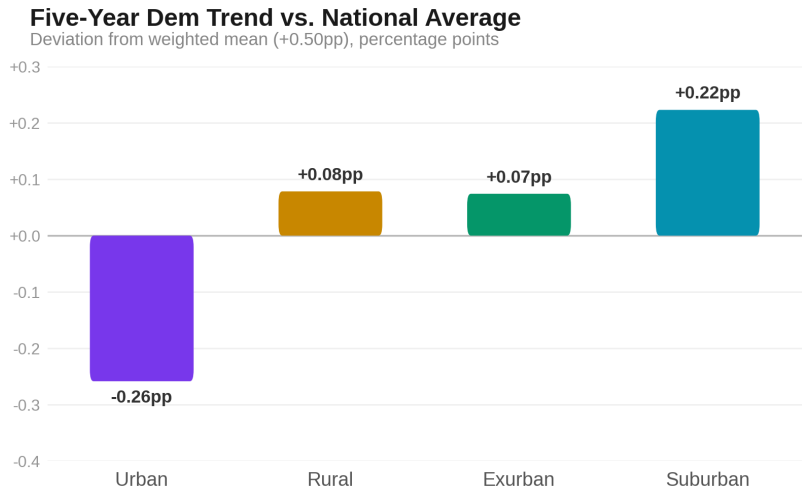
The model reveals two main areas of growth opportunity for Democrats: suburbs in currently competitive states and emerging states in the sunbelt and southwest.

1. The Suburbs

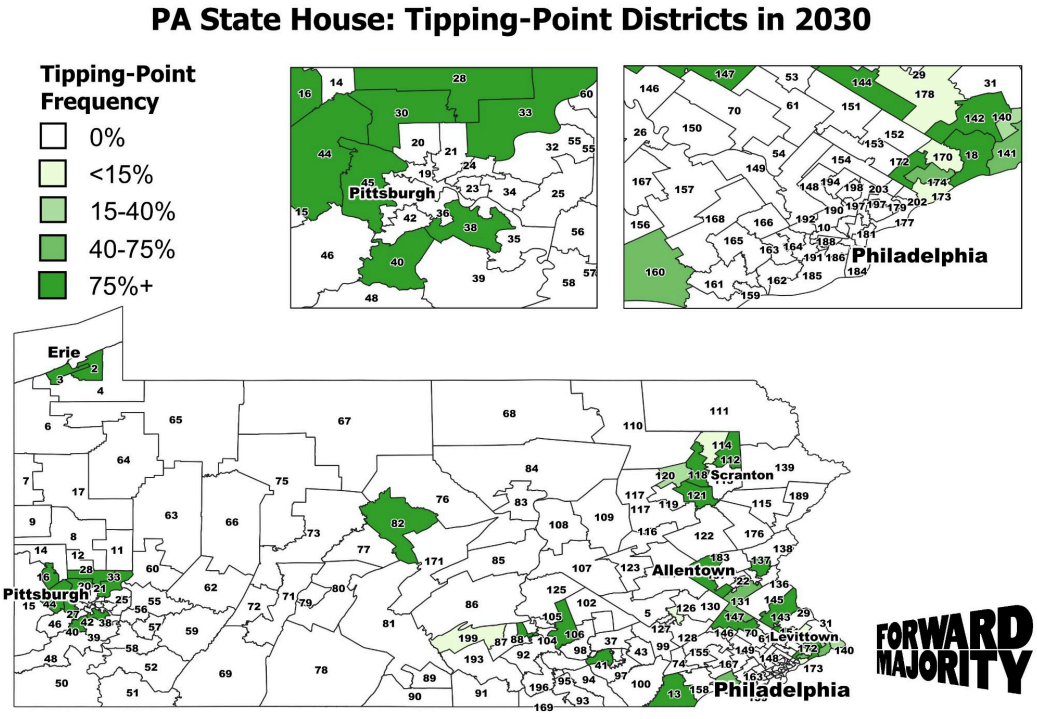


Source: Brookings Institution

Any list of where the landscape of American politics is changing should start with the suburbs. The suburbs have diversified faster than anywhere else over the last twenty years and are continuing to do so. They also have high shares of college-educated voters; Democrats have benefitted in these areas in recent years from education polarization.

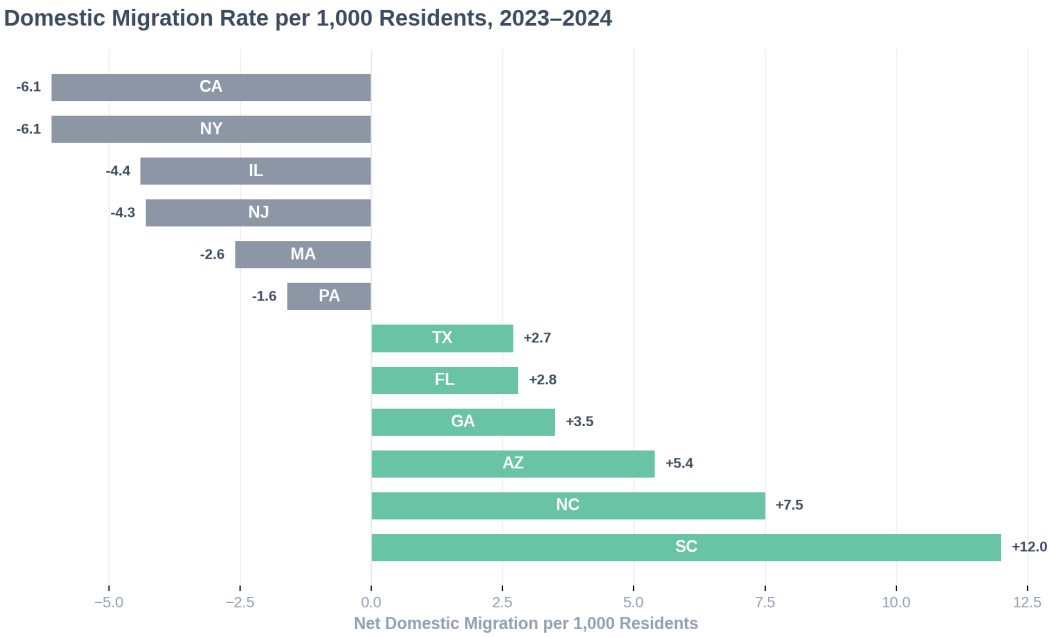


These forces are evident in our model - the largest trends in favor of Democrats are projected to play out in suburban districts. Suburban areas are also home to a majority of tipping-point districts.



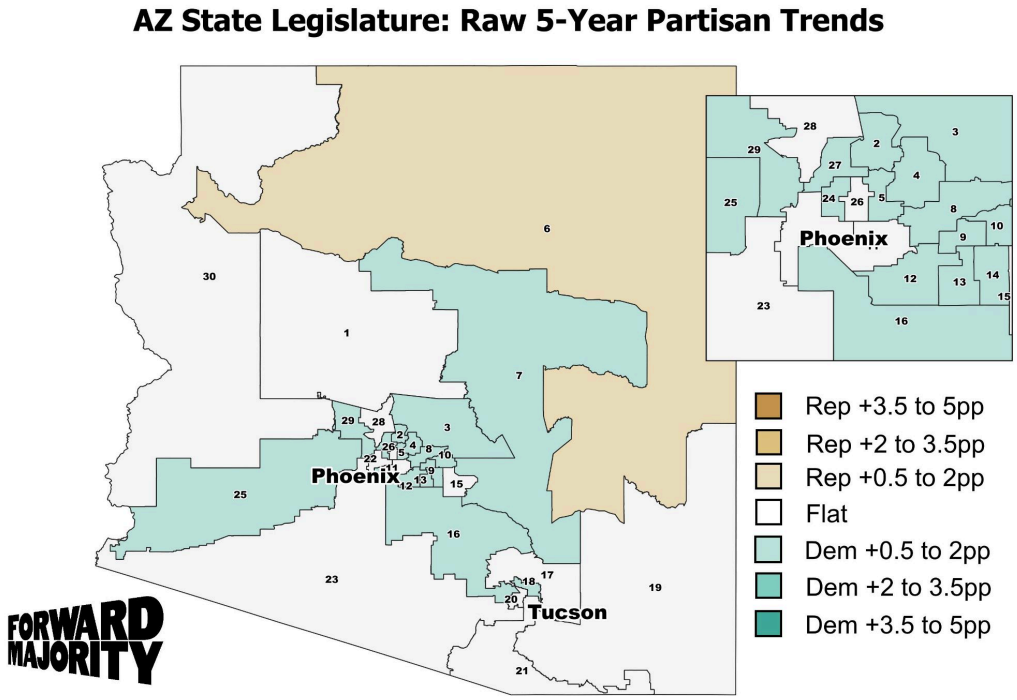
Pennsylvania's tipping-point districts are concentrated in the suburban ring around Philadelphia and in the Lehigh Valley, with additional clusters near Pittsburgh and Scranton. These are among the most education-sensitive districts in the model (college share is the single most common primary driver) which means the trajectory of education polarization will do more to determine control of the PA House than any other demographic force.

2. The Sunbelt & Southwest



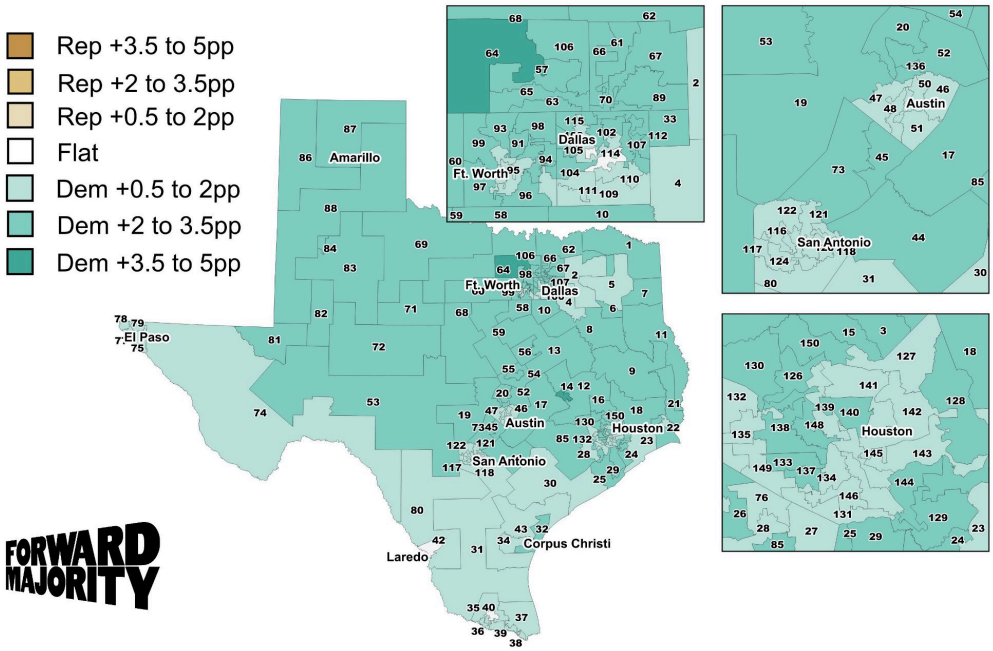
Source: US Census Population Estimates, December 2024

States in the sunbelt and southwest, especially AZ, FL, GA, NC, SC, and TX have both very diverse young populations and are magnet states for in-migration (see chart above). Not all of these states have competitive state legislatures, however. Both chambers in AZ are far and away the most competitive of these states in 2026.



A majority of districts in AZ, especially in suburban Phoenix, are expected to continue to trend Democratic through 2030. Forward Majority has been running campaigns here every cycle since our founding and began running partisan field voter registration here in 2022.

TX State House: Raw 5-Year Partisan Trends



The demographics favor all 150 state house districts in Texas, albeit with small deltas along the border. The weakest D-trending district is HD-40. It's an interesting case. The district is 56% Dem and 87% Hispanic. New movers to the district are also predominantly Hispanic but ~4 points *more Republican* than the existing electorate. Why? The district is home to several law enforcement agencies including the headquarters of the US Border Patrol's Rio Grande Valley Sector. Older voters are actually the most Dem-leaning age bracket in the district, turning the typical ramp of more-conservative-as-you-get-older on its head. The second most Dem-leaning bracket is the youngest voters who are aging in. Partisanship here is U-shaped with middle-aged voters being the most conservative. All told the contribution of young voters aging into the electorate is enough to offset both mortality and migration to lend the district a slight net pro-Democratic trend.

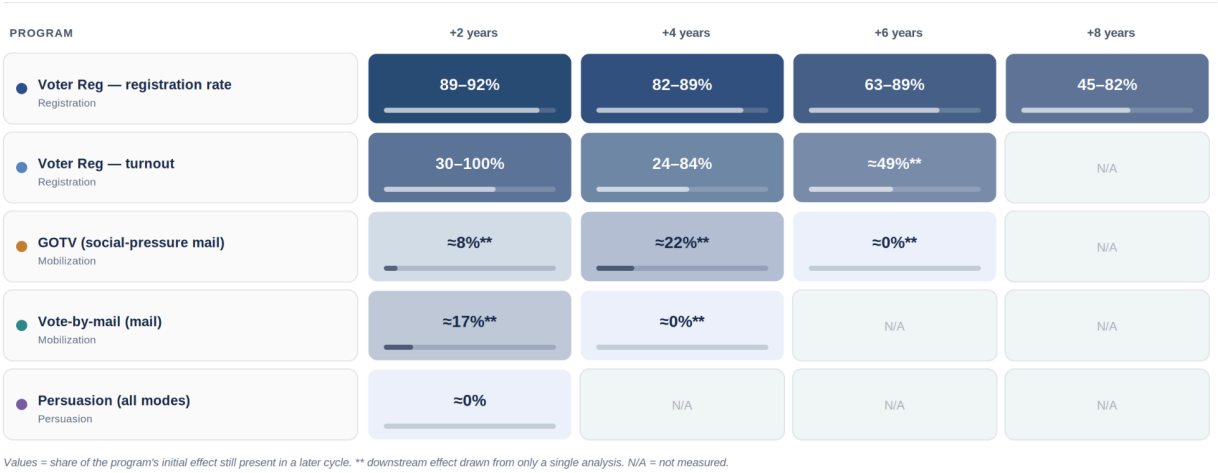
Statewide, Texas has a very diverse and disproportionately democratic-leaning youth population, large in-migration, and a very conservative and white elderly population. It's a recipe for growth.

Strategic Applications

Almost all electoral analysis is squarely focused on one timeframe: the period between now and the next election. That's appropriate because almost all the money spent on campaigns is spent in that same timeframe. But it leaves us with a blind-spot.

Virtually all campaign programs have zero net long-term impact. Long-term being three months. The question of which kinds of interventions have impact that persists more than 2 years into

the future is understudied but there is evidence to support two: voter registration and GOTV, very much in that order.



A review of available research shows that only voter registration demonstrates a clear and well-measured multi-cycle impact. As much as 84% of successful registrants continue to cast a ballot 4 years after they were initially registered.

GOTV also shows promise as a long-term tactic, although it is less well studied. Evidence suggests boosting turnout has knock-on effects for like-year elections. In other words getting someone to vote in a midterm makes it more likely they will vote in the next midterm, but doesn't necessarily increase their turnout for presidential years, and vice-versa.

Sensitivity to Voter Realignment and Top Demographic Drivers by Chamber

State	Chamber	Impact of Scenarios	Top Driver	2nd Driver	3rd Driver
TX	House	±9.6pp	Latino	College	Asian
TX	Senate	±9.0pp	Latino	Evangelical	College
WI	Assembly	±8.5pp	White	HS Only	—
WI	Senate	±8.5pp	White	College	—
VA	Senate	±8.2pp	Black	College	Asian
MN	House	±8.1pp	White	College	—
VA	House	±8.0pp	Black	College	Youth
MN	Senate	±8.0pp	White	College	—
GA	House	±8.0pp	Black	College	Evangelical
GA	Senate	±7.7pp	Black	Evangelical	College
ME	House	±7.2pp	White	Senior	HS Only
AZ	Senate	±6.9pp	Latino	College	—
AZ	House	±6.9pp	Latino	College	—
ME	Senate	±6.9pp	White	HS Only	Senior
NH	House	±6.9pp	White	College	HS Only
NH	Senate	±6.6pp	White	College	HS Only
NC	House	±6.5pp	Evangelical	Black	College
MI	Senate	±6.5pp	White	Youth	—
MI	House	±6.4pp	White	Youth	—
NC	Senate	±6.4pp	Black	Evangelical	Senior
PA	House	±5.8pp	Catholic	White	College
PA	Senate	±5.7pp	Catholic	White	HS Only

The model also identifies which cohorts punch above their weight in terms of determining the balance of power in each chamber. These reflect the geographies that compose the tipping-point landscape: typically suburban, college-educated, and often somewhat less diverse than the state overall.

Vote-choice scenarios are more influential in some states. TX, WI, and GA are all examples of states where vote-choice scenarios can greatly influence outcomes relevant to chamber control, while MI and PA tend to swing less with voter realignment and are only really influenced by the national environment (aka uniform swing).

State Model Outputs and Maps

Below are model outputs for select states and chambers.

The primary concern of the model is rank order. Rank order (and our modeled projections about how it may change in the next 5 years) is the most useful factor in determining which districts are likely to be closest to the chamber median and thus most relevant to winning a chamber. If we can get rank order right we can direct resources towards the districts that will help us win a majority without having to guess correctly about which year conditions will be right. Perhaps a chamber will be in play in 2028, perhaps 2030, perhaps even this year. Knowing the likely rank order means we can make informed strategic decisions even in the context of enormous uncertainty about the overall electoral environment.

Rank order is determined by *relative* trends, not absolute trends. We're much more interested in how districts are likely to shift *relative to each other* than the overall trend of the chamber. Overall movement is certainly helpful for knowing which chambers might even be considered competitive in 2030, but the brass tacks of flipping a chamber really come down to where districts stand relative to each other. The maps below are best understood in this context. We're not attempting to project whether Democrats will control a chamber in 2030 so much as identifying the most likely path to accomplish this *when conditions are right*.

Because the model is structured around demographics it tends to output favorable absolute trends for Democrats nationwide. This is because older voters are more conservative almost everywhere while younger voters are more diverse and more progressive, so as maturation and mortality create churn in the electorate it has the apparent effect of rendering the electorate more friendly for Democrats over time by default. Of course these forces don't exert themselves in a vacuum - if they did we'd already live in a permanent progressive utopia.The two major parties are constantly engaged in competition for ideologically mobile voters and over the very long term fight to a draw. Maps are provided for every chamber below that are adjusted downwards to account for the national drift towards Democrats (about +0.9pp over 5 years) so as to provide a relative view of which states are trending more aggressively (states such as GA, VA, and TX) and which states are lagging the average (the midwestern states of MI, WI, and MN).

Raw and Relative Partisan Trends by Chamber

State	Chamber	Raw Partisan Trend	Relative to Natl Avg.
AK	House	+0.32	−0.58
AK	Senate	+0.35	−0.55
AZ	House	+0.46	−0.44
AZ	Senate	+0.46	−0.44
FL	House	+0.32	−0.58
FL	Senate	+0.34	−0.56
GA	House	+1.84	+0.94
GA	Senate	+1.90	+0.99
IA	House	+0.30	−0.61
IA	Senate	+0.33	−0.57
KS	House	+0.71	−0.19
KS	Senate	+0.76	−0.14
ME	House	+0.13	−0.78
ME	Senate	+0.20	−0.71
MI	House	+0.76	−0.14
MI	Senate	+0.79	−0.12
MN	House	+0.08	−0.82
MN	Senate	+0.09	−0.81
NC	House	+0.39	−0.51
NC	Senate	+0.46	−0.45
NH	House	+0.28	−0.62
NH	Senate	+0.32	−0.59
NV	House	+0.46	−0.44
NV	Senate	+0.50	−0.41
PA	House	+0.42	−0.48
PA	Senate	+0.48	−0.42
TX	House	+1.90	+0.99
TX	Senate	+2.04	+1.13
VA	House	+1.37	+0.47
VA	Senate	+1.47	+0.57
WI	House	+0.27	−0.63
WI	Senate	+0.32	−0.58

Arizona Legislature

Lean R

2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
23.3%	14.2%	47.9%	+2.1pp

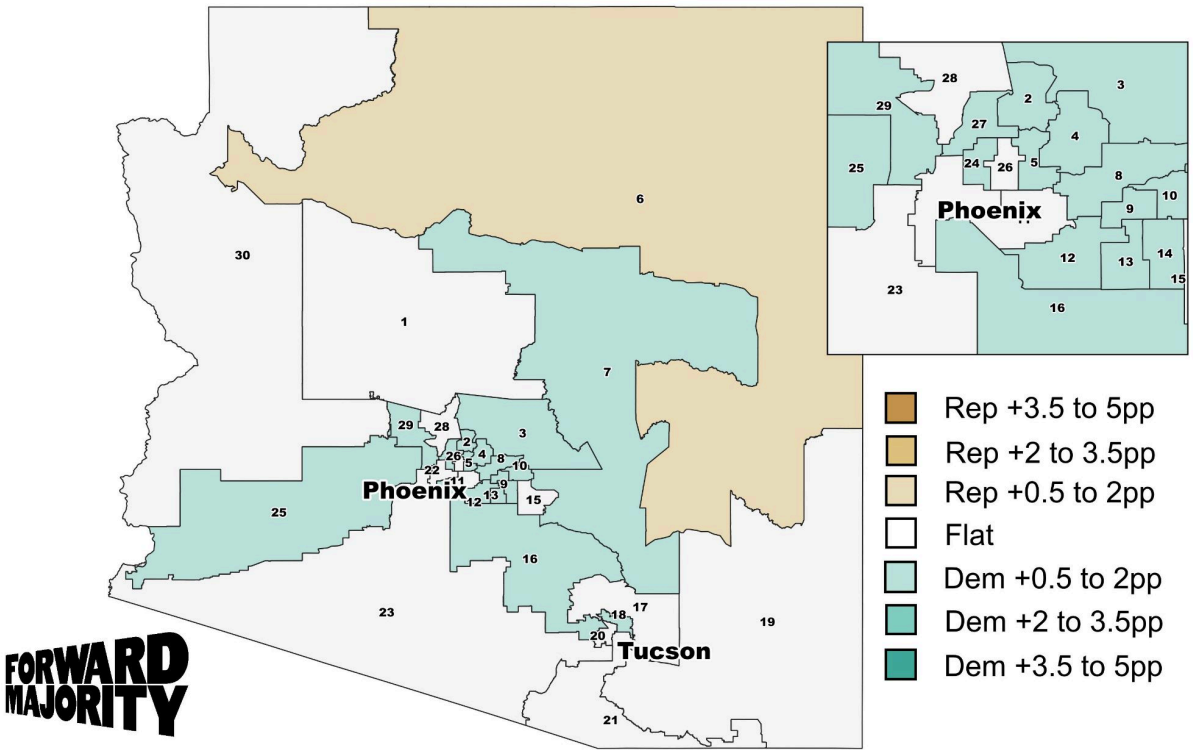
5-YEAR TRENDS

Raw	Relative to Natl Avg
+0.46pp	−0.44pp

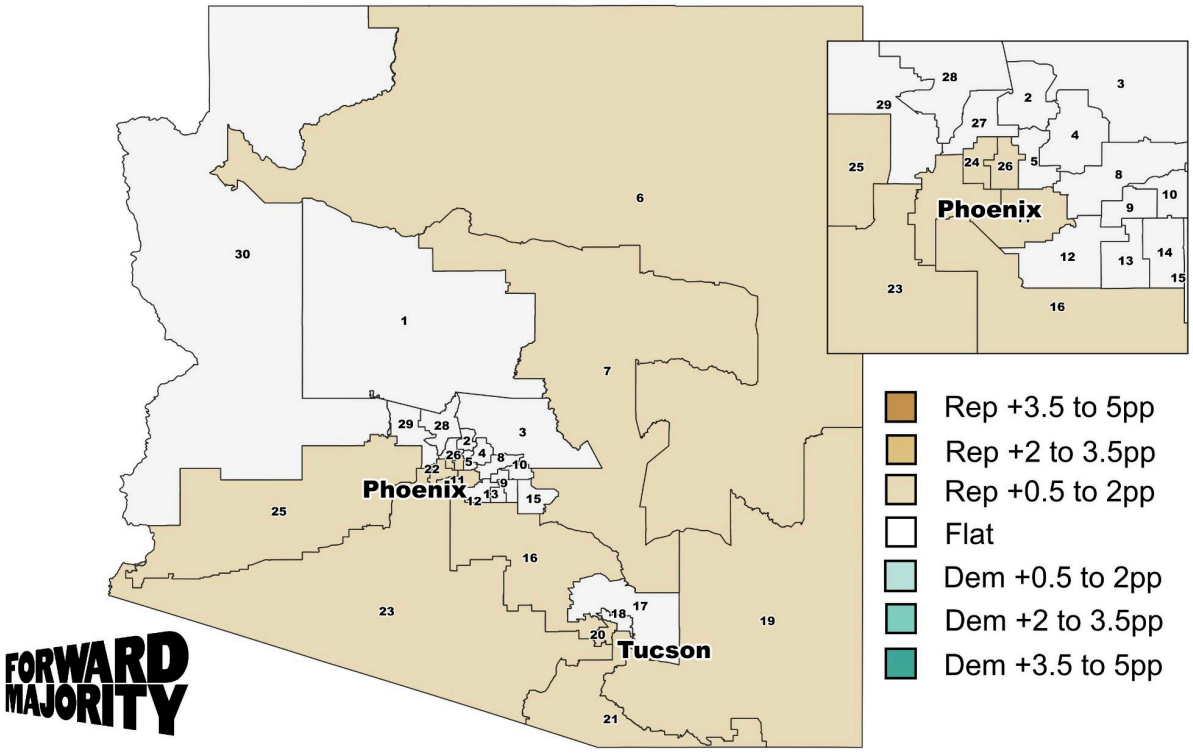
The raw demographic churn in Arizona trends Democratic by about +0.5 points over the next 5 years due to older, whiter, more conservative voters dying out and a more diverse group of young people (about 52% nonwhite, versus 42% of today's electorate) reaching voting age. However this trend lags the population-weighted national average because, while Arizona does have a fast-diversifying young population, its Latino and younger voters lean less Democratic than their counterparts in a state like Texas. In-movers also trend slightly Republican (by about a tenth of a point) compared to Democratic-leaning in-movers in states like Texas and Georgia.

Within the state, metro Phoenix and its suburbs are changing fastest. Tucson, already heavily Democratic with little room to grow, moves less, and the rural border region and the Navajo Nation in the northeast actually slip a bit as people move away.

AZ State Legislature: Raw 5-Year Partisan Trends

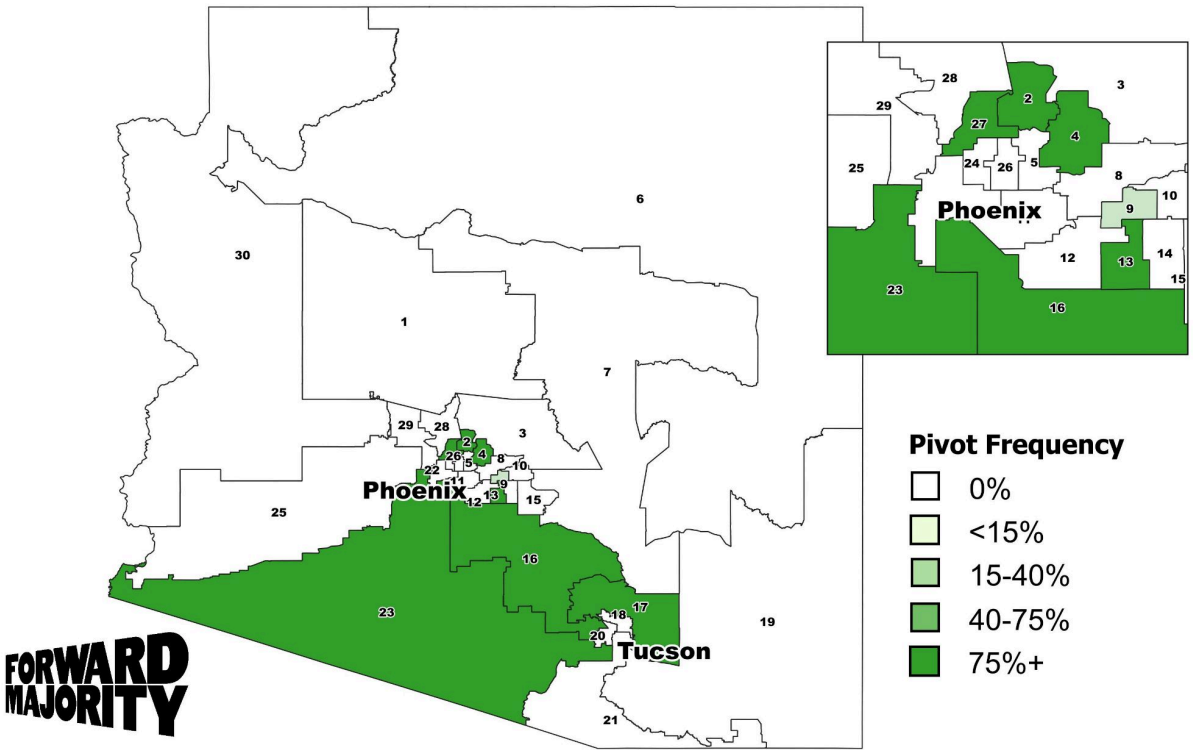


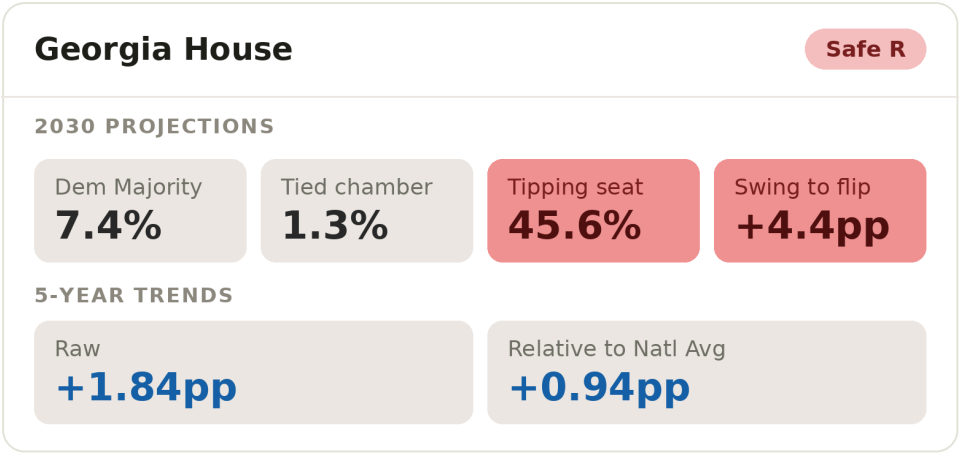
AZ State Legislature: 5-Year Partisan Trends Relative to Natl Avg



The tipping-point districts in Arizona cluster in the northern and northeastern suburbs of Phoenix (districts 2, 4, and 27), the Tucson area (17 and 20), and the large rural districts spanning southern and western Arizona along the border (23 and 16). The Phoenix suburban seats and the geographically enormous southern districts carry the heaviest pivot frequency.

Arizona State Legislature: Tipping-Point Districts in 2030

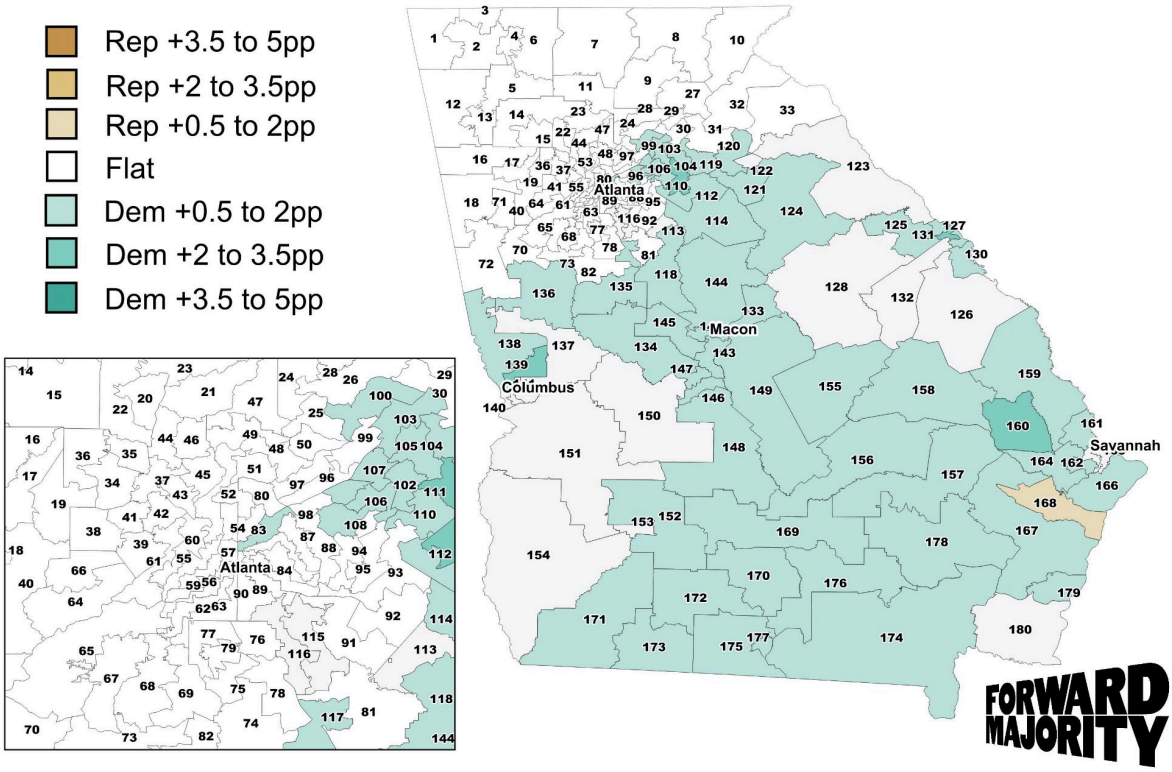




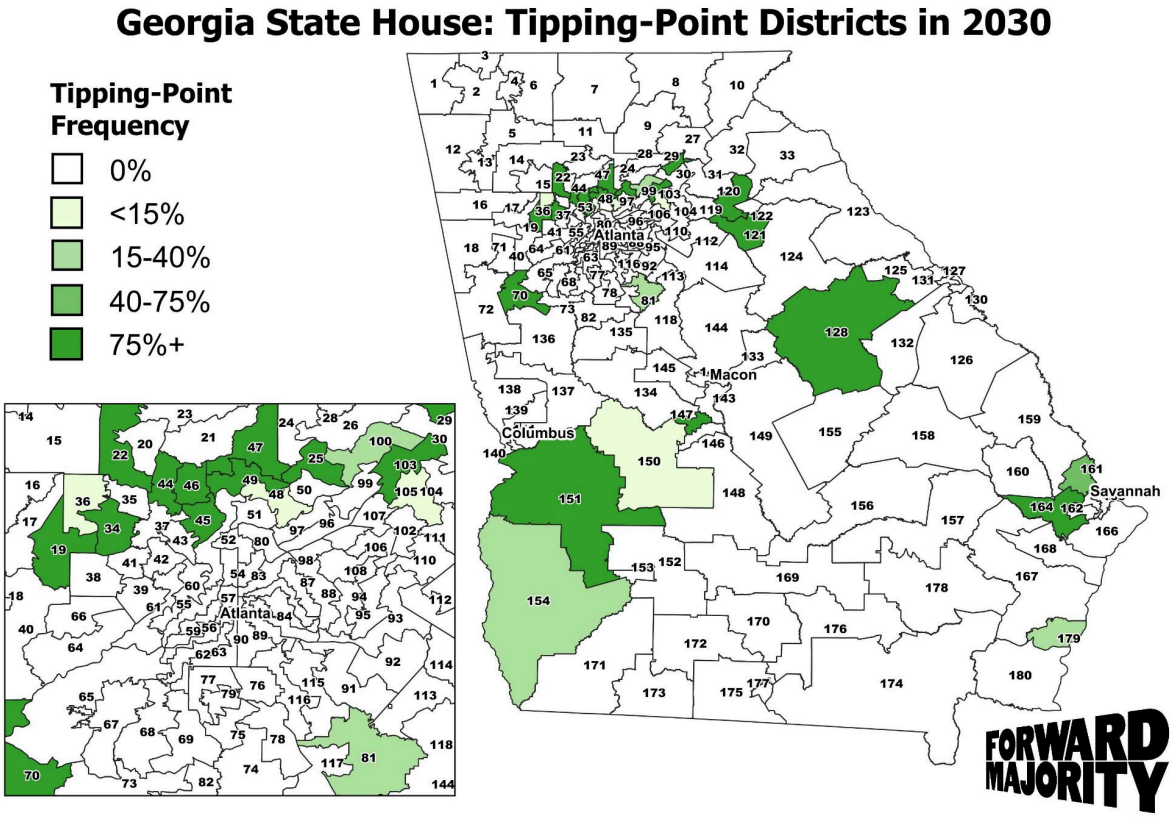
Georgia is the most strongly Dem-trending of all the states we modeled as all three forces (maturation, mortality, and migration) push in the same way. Older voters in Georgia are exceptionally Republican-leaning while the young population is more Black, Latino, and Asian than the existing adult electorate. In movers also lean Democratic as college-educated Black adults move into metro Atlanta. There is also strong in-migration of Asian immigrants, similar to Texas.

Within the state, the biggest gains are across the rural Black Belt of south Georgia and the eastern suburbs of Atlanta. Heavily Black core cities (Atlanta, Macon, Augusta, Columbus) are already so Democratic that they barely move as older Democrats passing away roughly cancels new Democratic arrivals. Note the map shown below is Democratic growth above and beyond the raw national average of 0.9pp. The raw trends show strong Democratic growth across the entire Atlanta metro area.

GA State House: 5-Year Partisan Trends Relative to Natl Avg



The tipping-point districts in Georgia are overwhelmingly concentrated in metropolitan Atlanta, blanketing the suburban ring. Beyond the metro, smaller clusters appear around Athens and the northeastern exurbs (districts 120, 121, 122), near Savannah on the coast (161, 162, 164), and in the southwest around Columbus and the rural counties below it (151, 154).



Michigan House

Lean R

2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
42.4%	2.6%	49.9%	+0.1pp

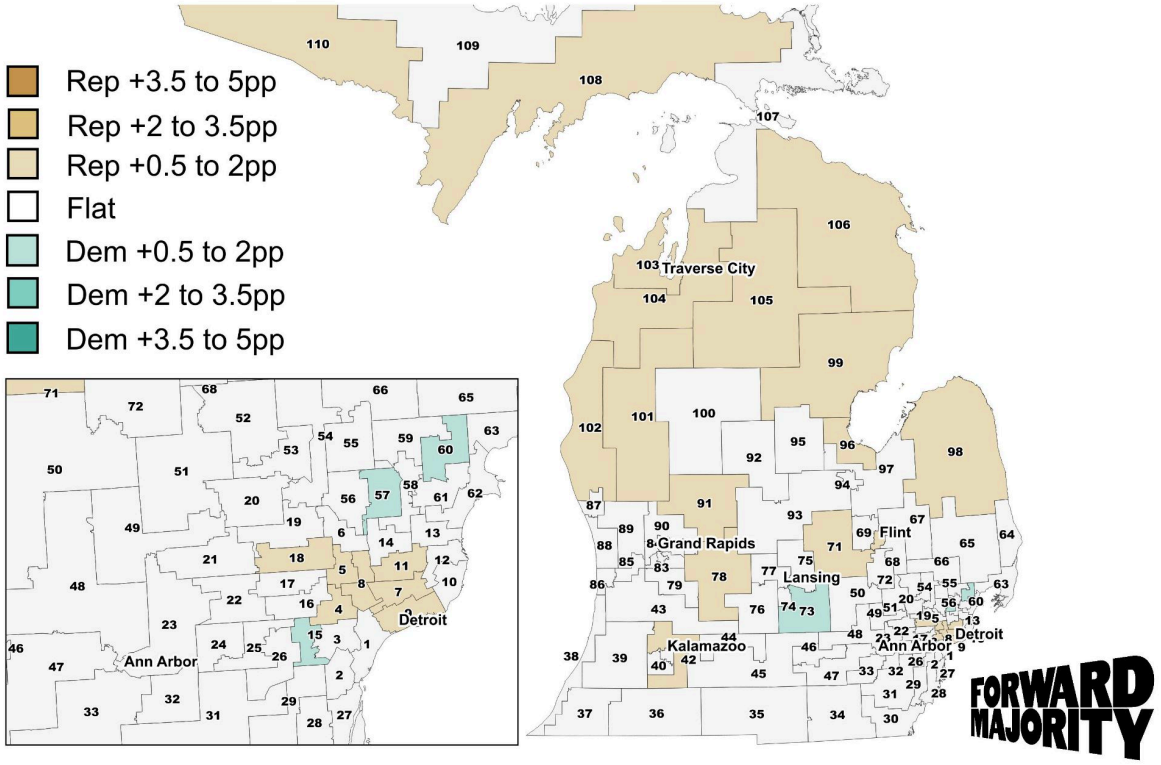
5-YEAR TRENDS

Raw	Relative to Natl Avg
+0.76pp	−0.14pp

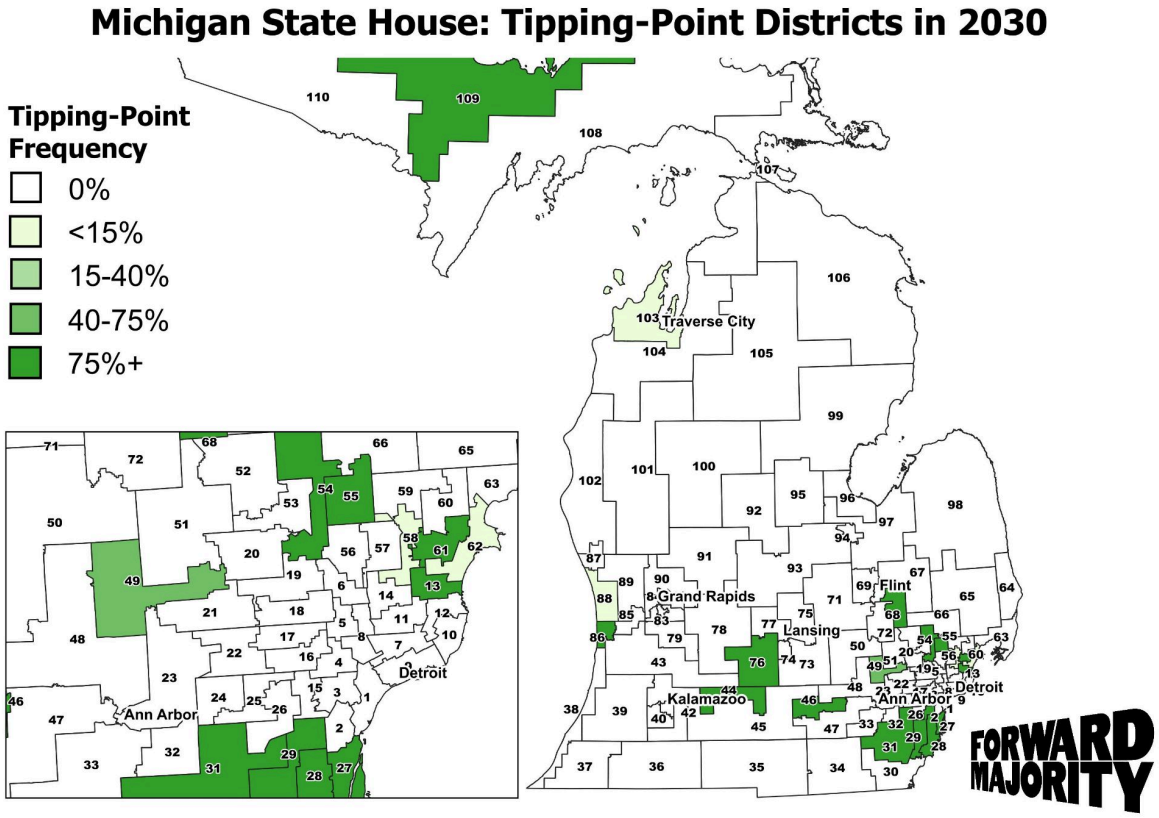
Modest projected trends in Michigan are largely due to more conservative, white voters aging out of the electorate while more Democratic-leaning young voters age in. The youth population in Michigan is not notably more diverse than the current electorate but young white voters are far less religiously affiliated (national 18–24 unaffiliated 43% vs 13% of the oldest; Pew Research Center, 2023–24 RLS) and more likely to be college-educated than the older generation.

Within the state, the Detroit suburbs and Lansing show the most growth potential while Detroit and Ann Arbor are already heavily Democratic and flat. Western Michigan around Grand Rapids turns over quickly but with less net change, so it trails the suburbs, and the rural north and Upper Peninsula trail furthest.

MI State House: 5-Year Partisan Trends Relative to Natl Avg



Tipping-point districts in Michigan largely center around the suburbs of Detroit. Secondary clusters show up around Grand Rapids, Lansing, Flint, and Kalamazoo.



Michigan Senate

Tossup

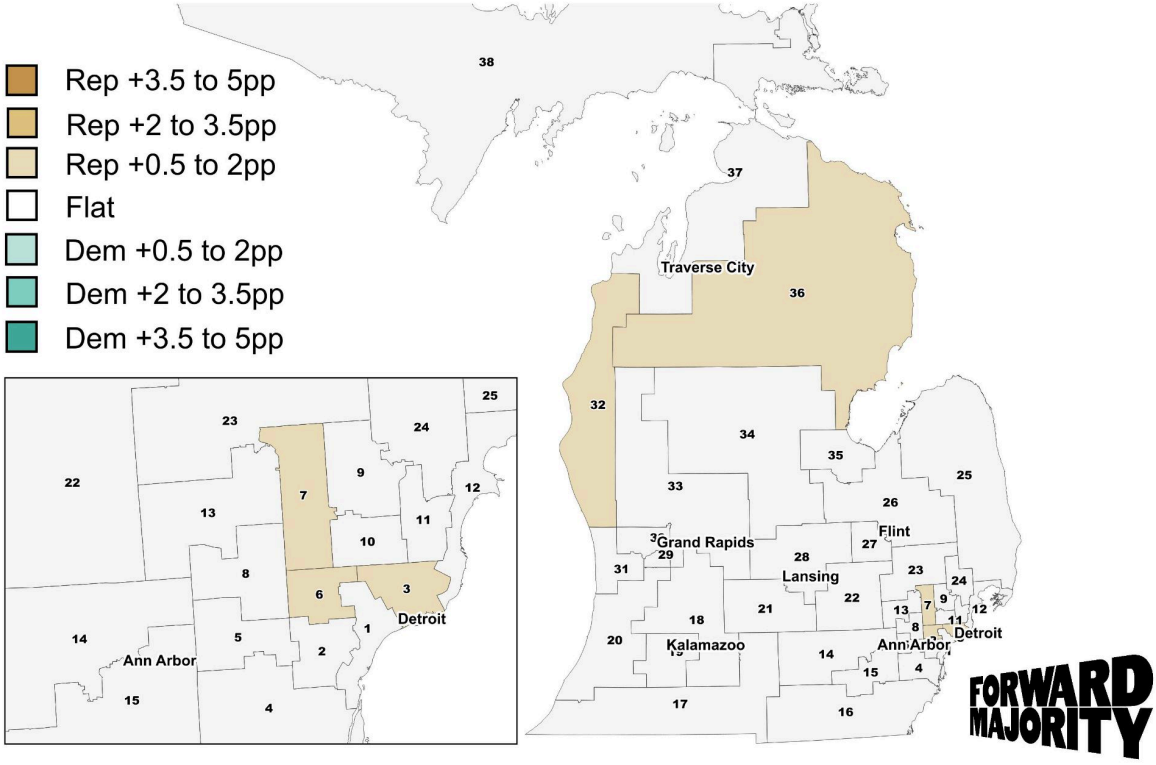
2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
54.4%	1.7%	50.4%	−0.4pp

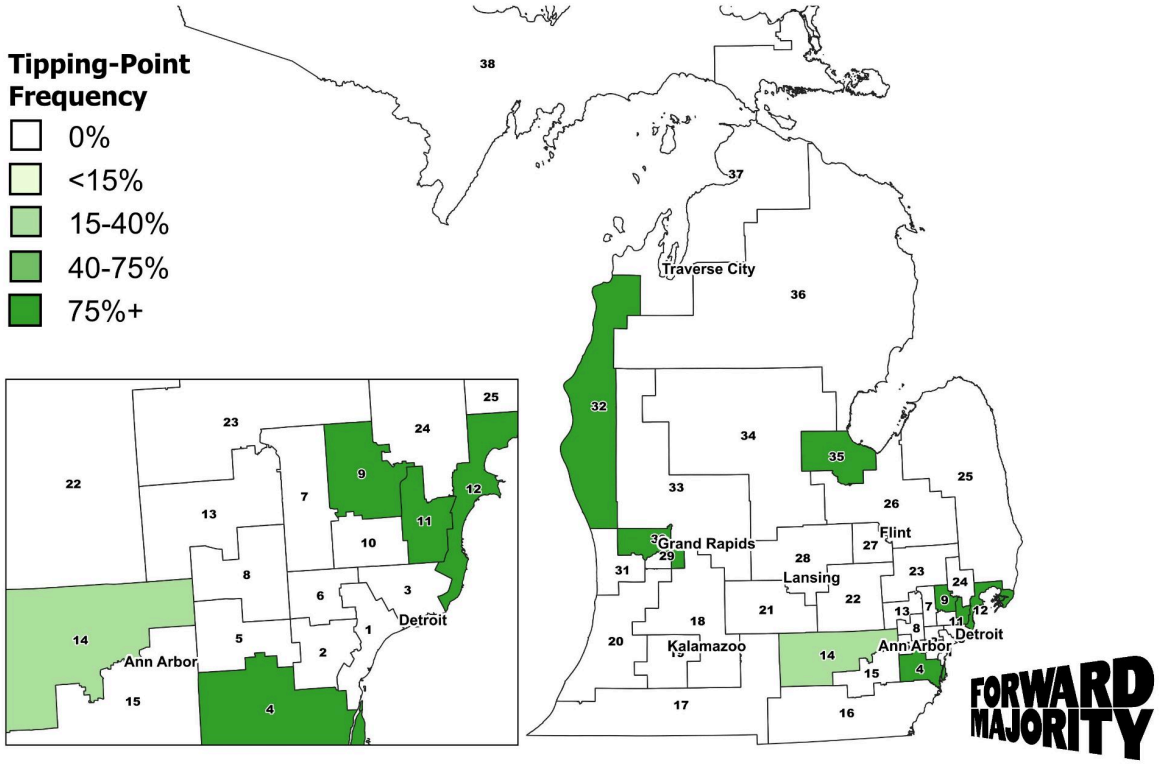
5-YEAR TRENDS

Raw	Relative to Natl Avg
+0.79pp	−0.12pp

MI State Senate: 5-Year Partisan Trends Relative to Natl Avg



Michigan State Senate: Tipping-Point Districts in 2030



Minnesota House

Tossup

2030 PROJECTIONS

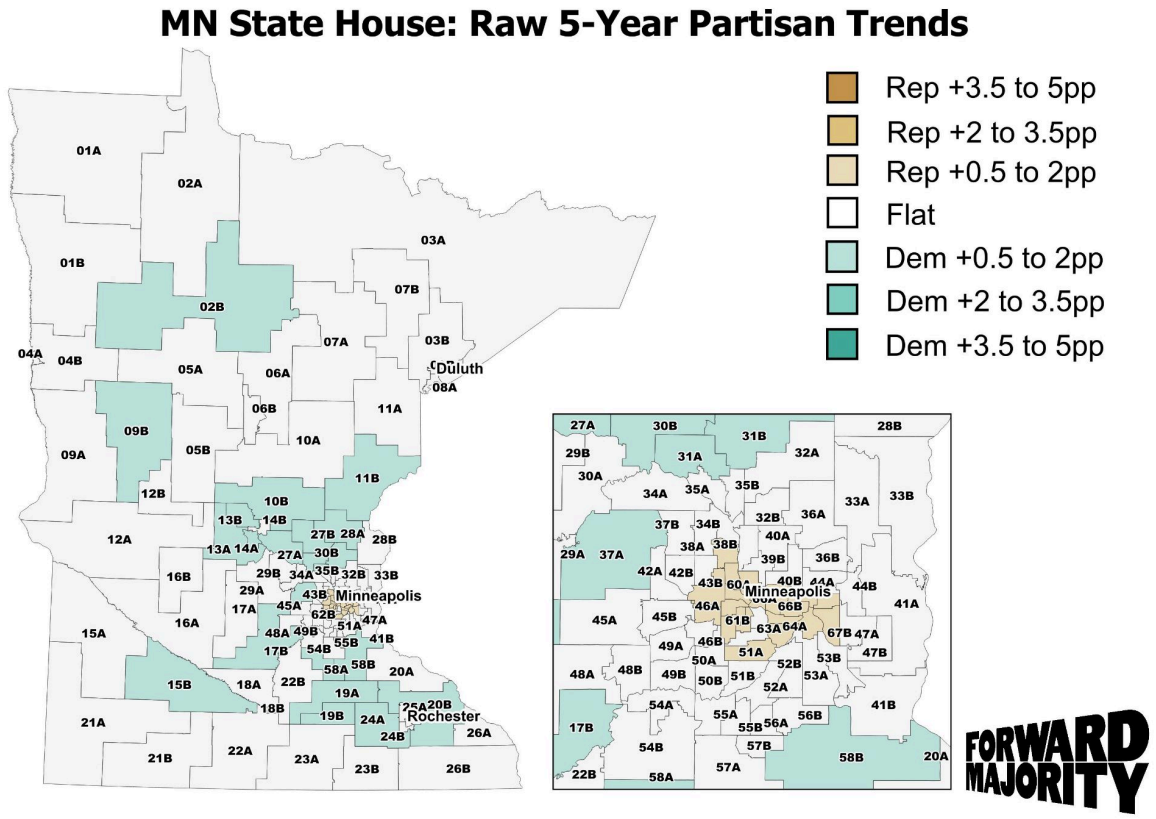
Dem Majority	Tied chamber	Tipping seat	Swing to flip
49.7%	2.9%	49.9%	+0.1pp

5-YEAR TRENDS

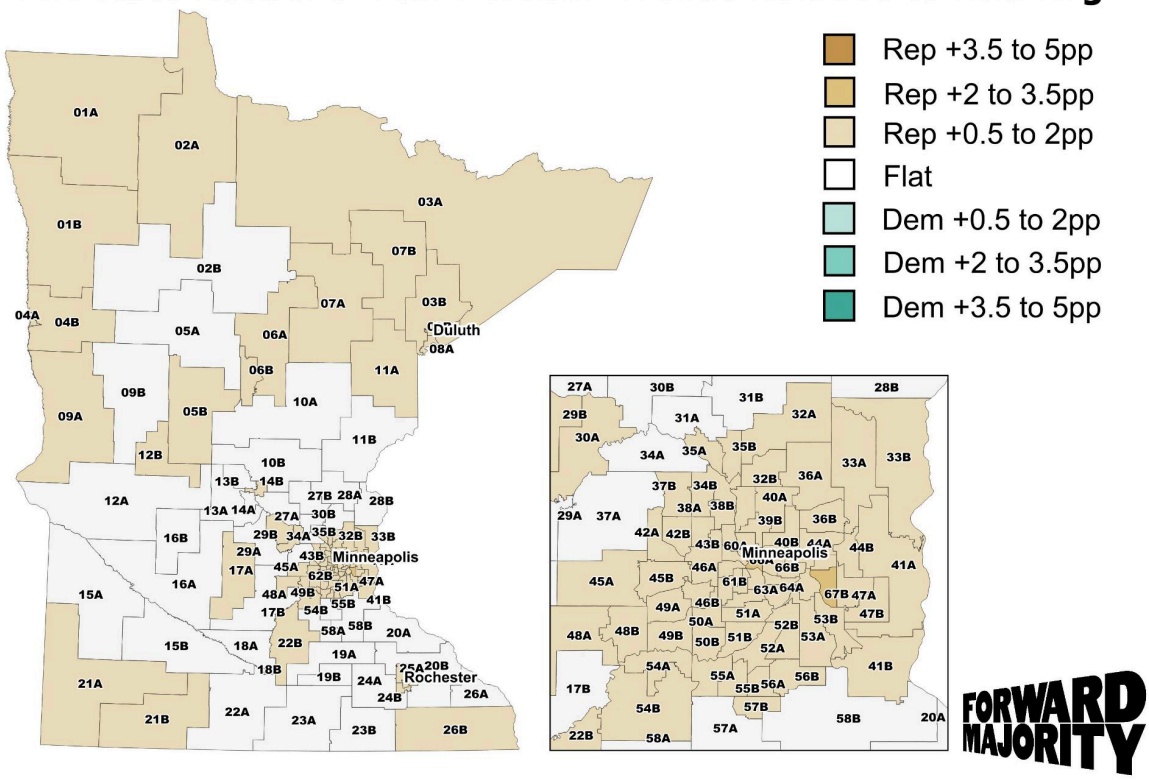
Raw	Relative to Natl Avg
+0.08pp	−0.82pp

Trends in Minnesota are largely flat despite a diverse young population because there's less age stratification of partisanship. Older voters in Minnesota are more likely to vote Democratic than other midwestern states (average partisanship score of 51.6 in MN compared to 49.3 in WI and 48.6 in MI) so mortality doesn't result in the same partisan churn here. The raw trends very slightly favor Democrats over the next 5 years but the state falls short of the national average.

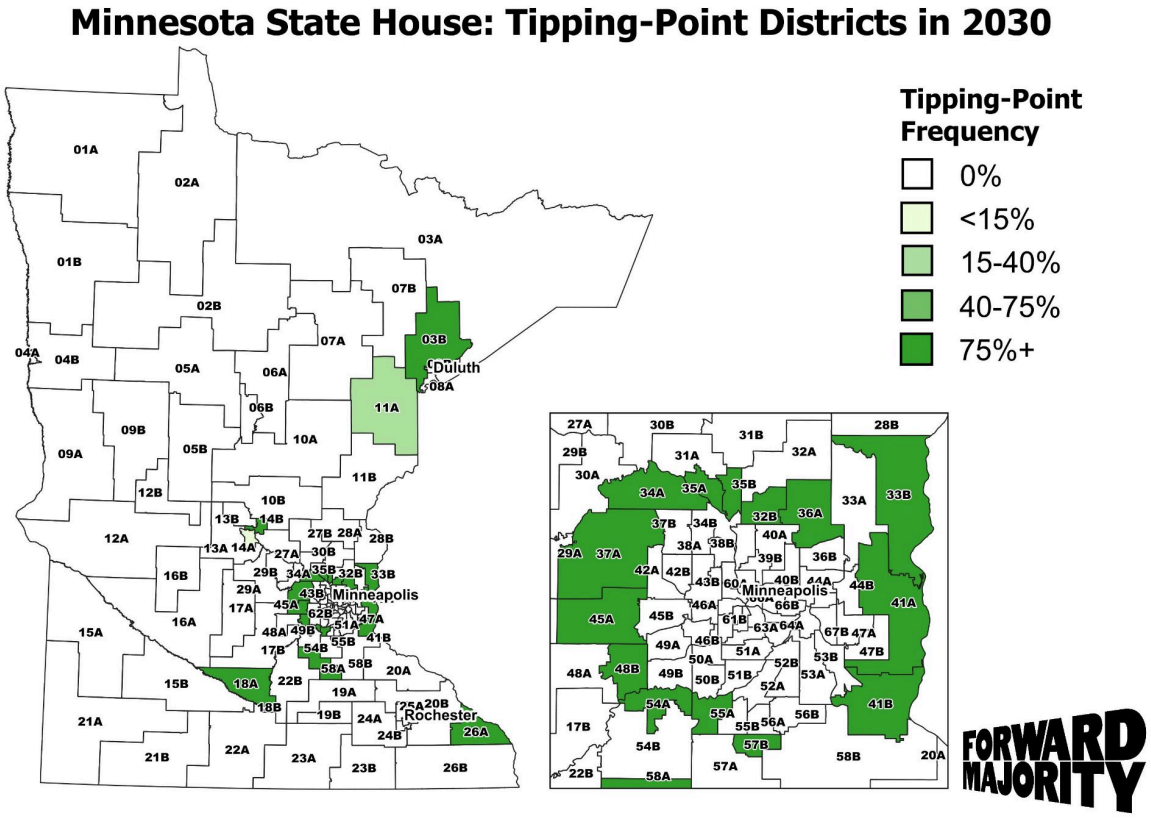
Within the state, the Minneapolis/St. Paul core trends slightly Republican: older urban Democrats are passing away, and newcomers, while still Democratic, are a bit less so than longtime residents, nudging these very-blue areas down. The suburbs and exurbs, Duluth, and much of greater Minnesota trend modestly Democratic.



MN State House: 5-Year Partisan Trends Relative to Natl Avg



The tipping-point districts in Minnesota form a ring around the Twin Cities. In the House there's also a small cluster near Duluth (districts 03B and 11A).



Minnesota Senate

Lean R

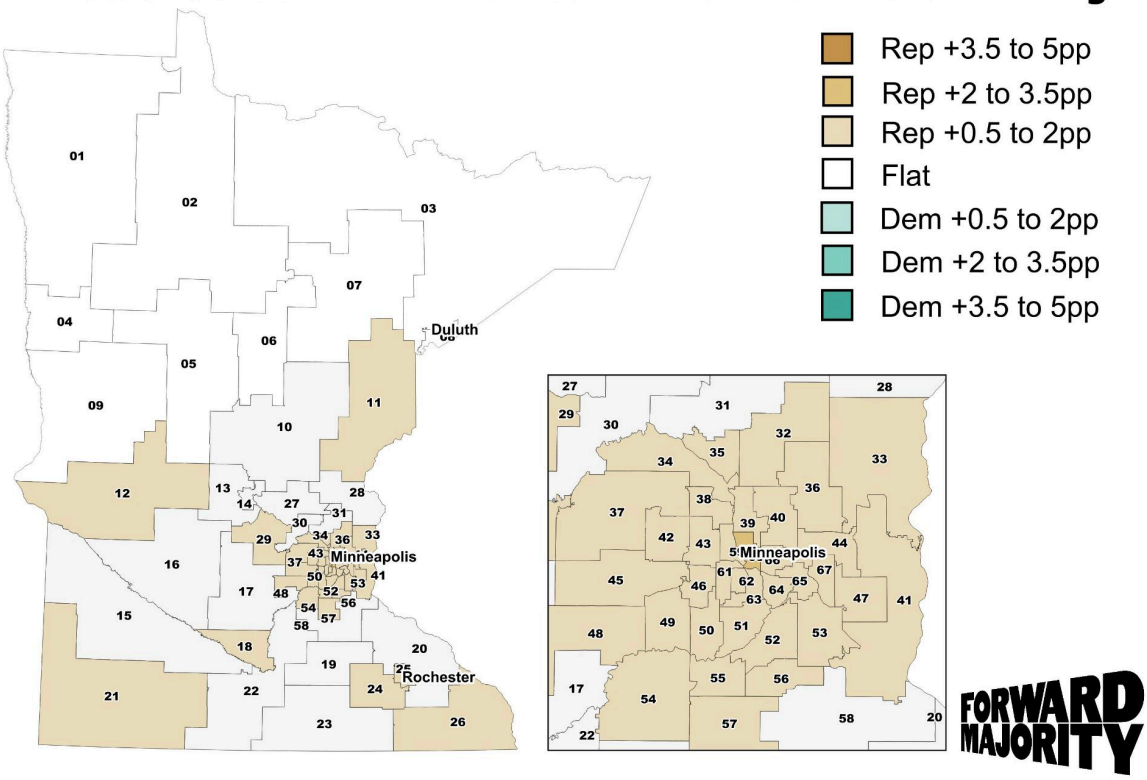
2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
40.2%	N/A	48.7%	+1.3pp

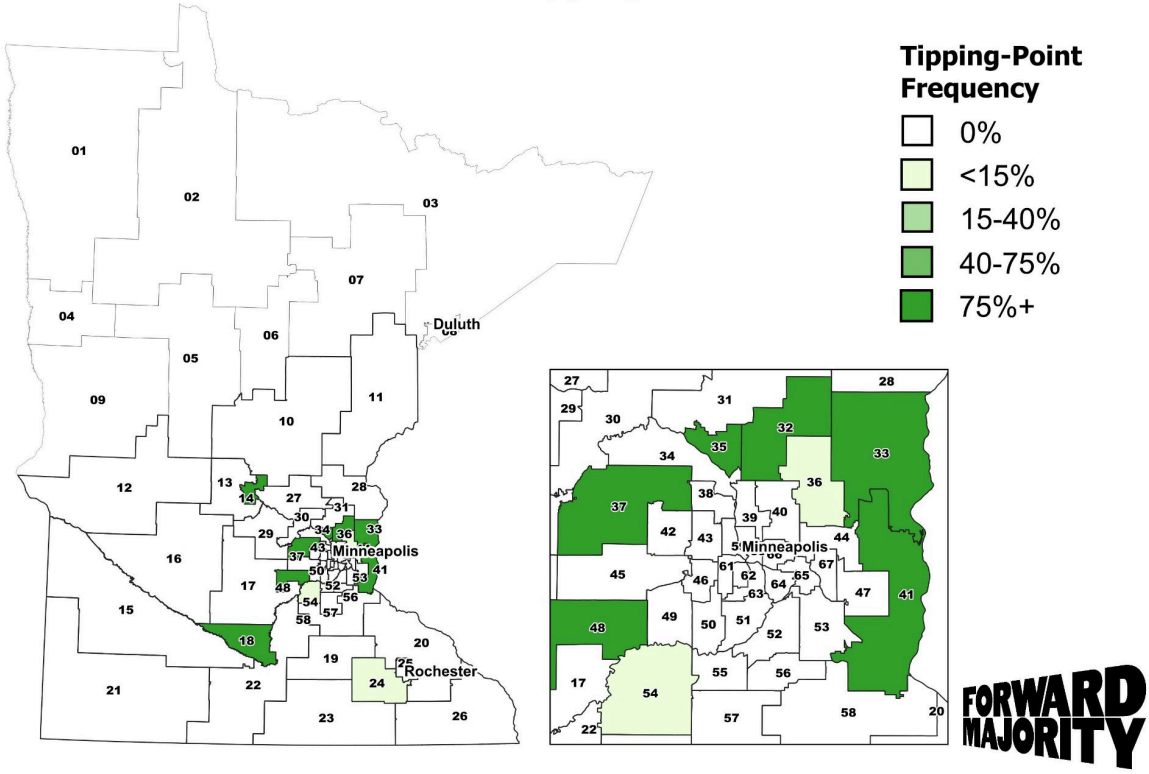
5-YEAR TRENDS

Raw	Relative to Natl Avg
+0.09pp	−0.81pp

MN State Senate: 5-Year Partisan Trends Relative to Natl Avg



Minnesota State Senate: Tipping-Point Districts in 2030



North Carolina House

Safe R

2030 PROJECTIONS

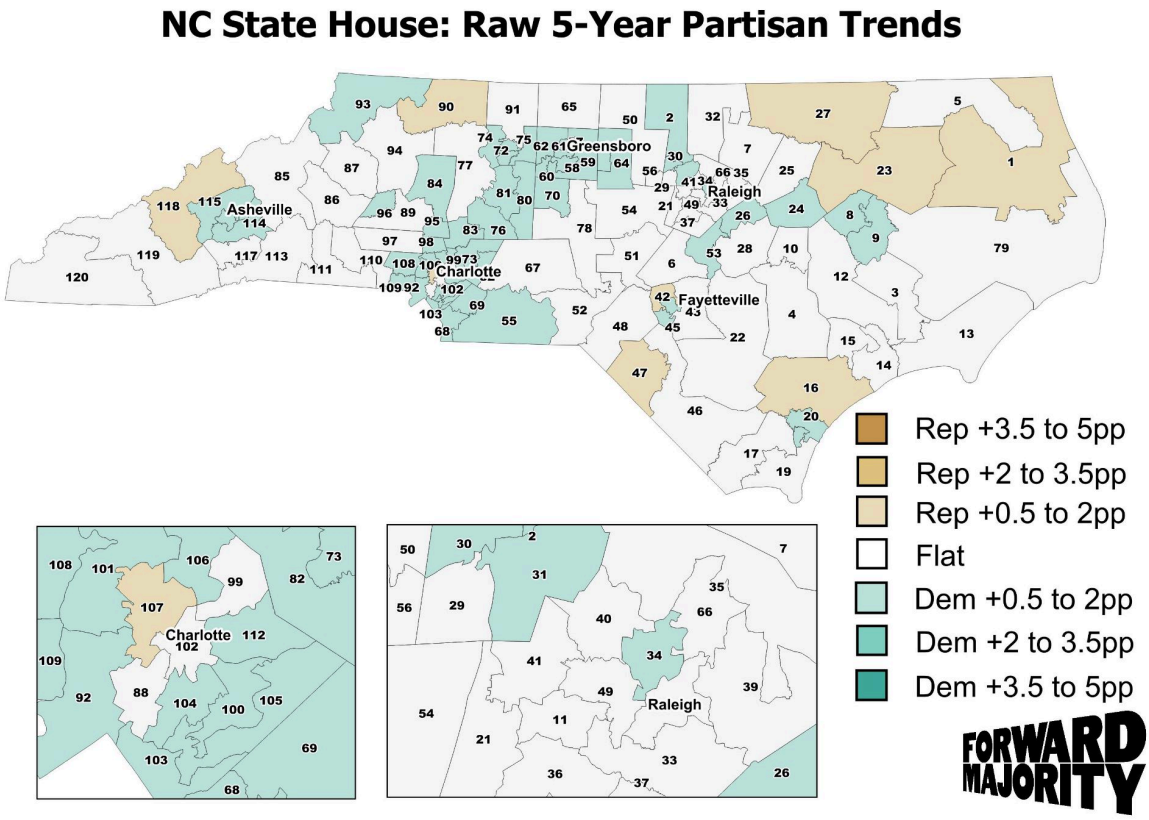
Dem Majority	Tied chamber	Tipping seat	Swing to flip
2.9%	<1%	45.2%	+4.8pp

5-YEAR TRENDS

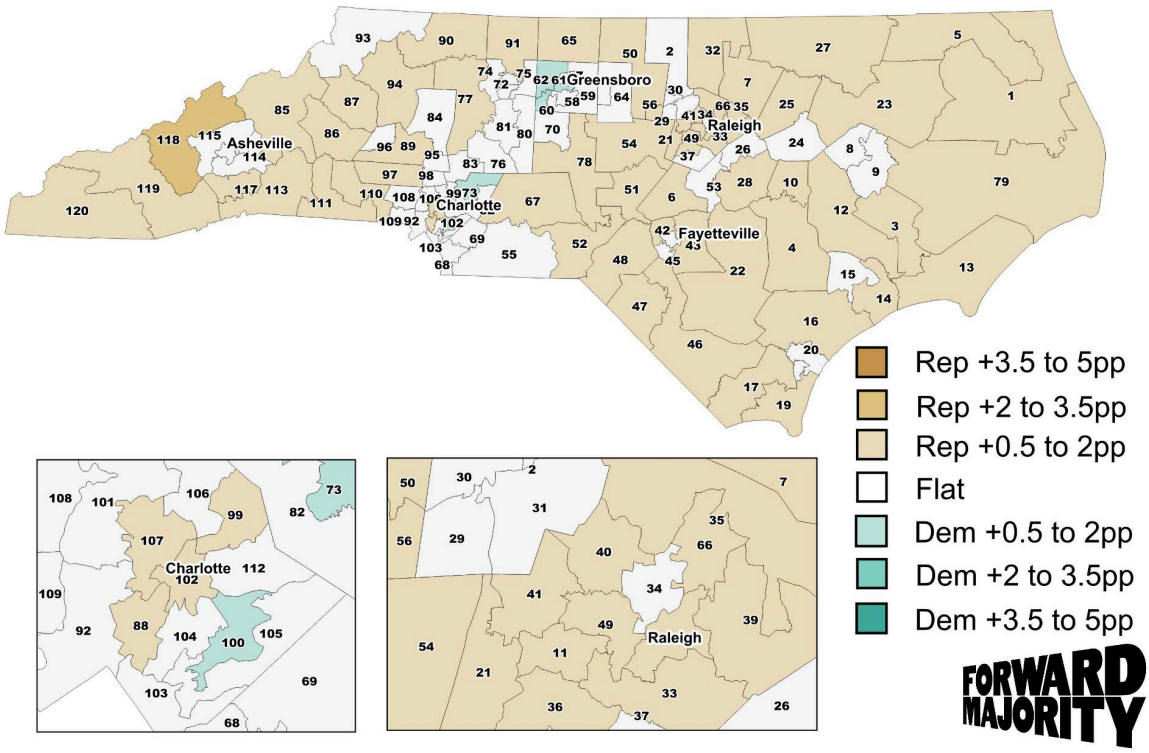
Raw	Relative to Natl Avg
+0.39pp	−0.51pp

North Carolina straddles the line: raw trends show modest movement towards Democrats of +0.4pp but this lags the national population-weighted average by about half a point. It diversifies through generational replacement at roughly the same rate as Georgia, but it gets far less out of it because older voters in NC lean only mildly Republican. 2024 VoteCast data indicates the Harris vote among 65+ in NC was only 4 points behind younger voters while in GA the gap was 12 points.

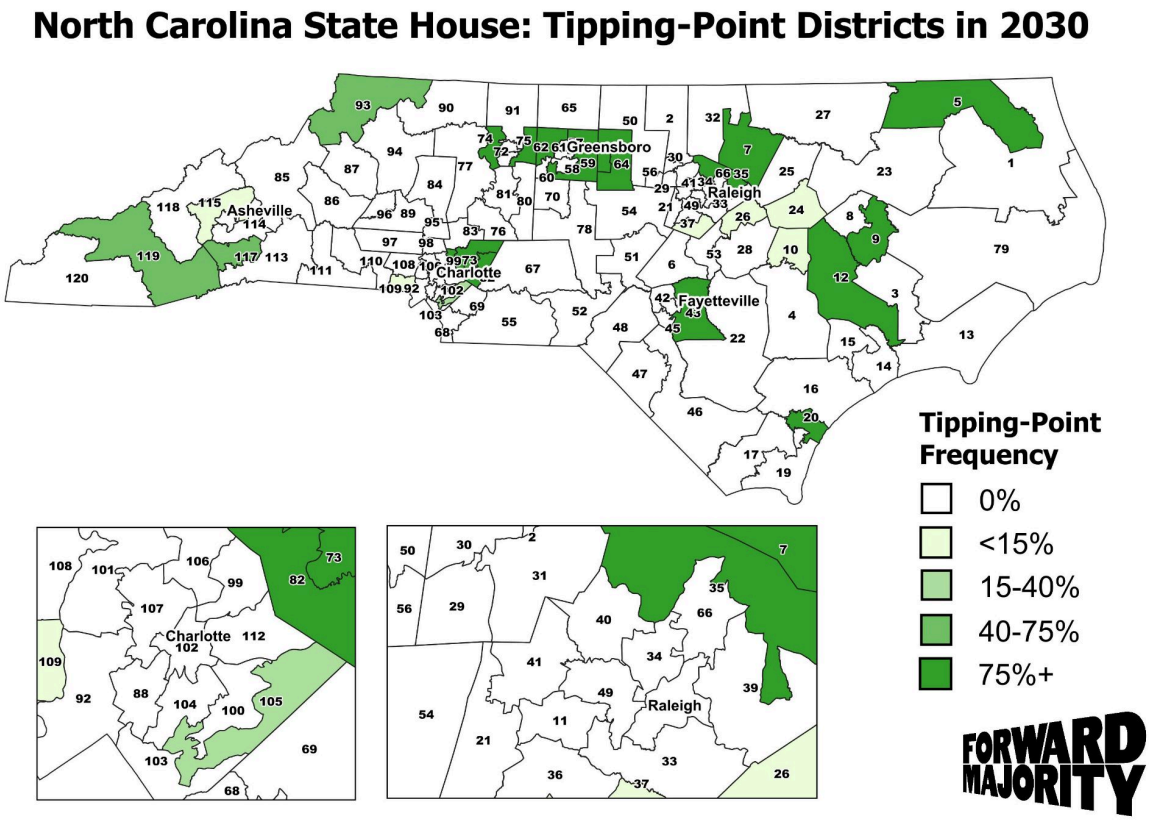
Within the state, the Charlotte suburbs and the Piedmont cities (especially Greensboro) are projected to trend most strongly in Democrats' favor. Raleigh and Durham are already heavily Democratic and move little while the western mountains, the rural east, and the military community around Fayetteville lag.



NC State House: 5-Year Partisan Trends Relative to Natl Avg



Tipping-point districts in the NC House cluster in the Greensboro/Triad area, the suburbs around Raleigh and Wake County, Charlotte, and Fayetteville, plus scattered eastern and western seats. Tipping-point districts in the Senate include districts in rural eastern North Carolina, where several large coastal-plain districts (1, 2, 3, 4) carry very high pivot frequency, alongside Greensboro, the Charlotte area, and the south-central region near Fayetteville. Because the NC Senate is a more challenging chamber for Democrats to put in play, the districts that would likely determine control are tougher than in the House, putting a majority in this chamber effectively out of reach for Democrats.



North Carolina Senate

Safe R

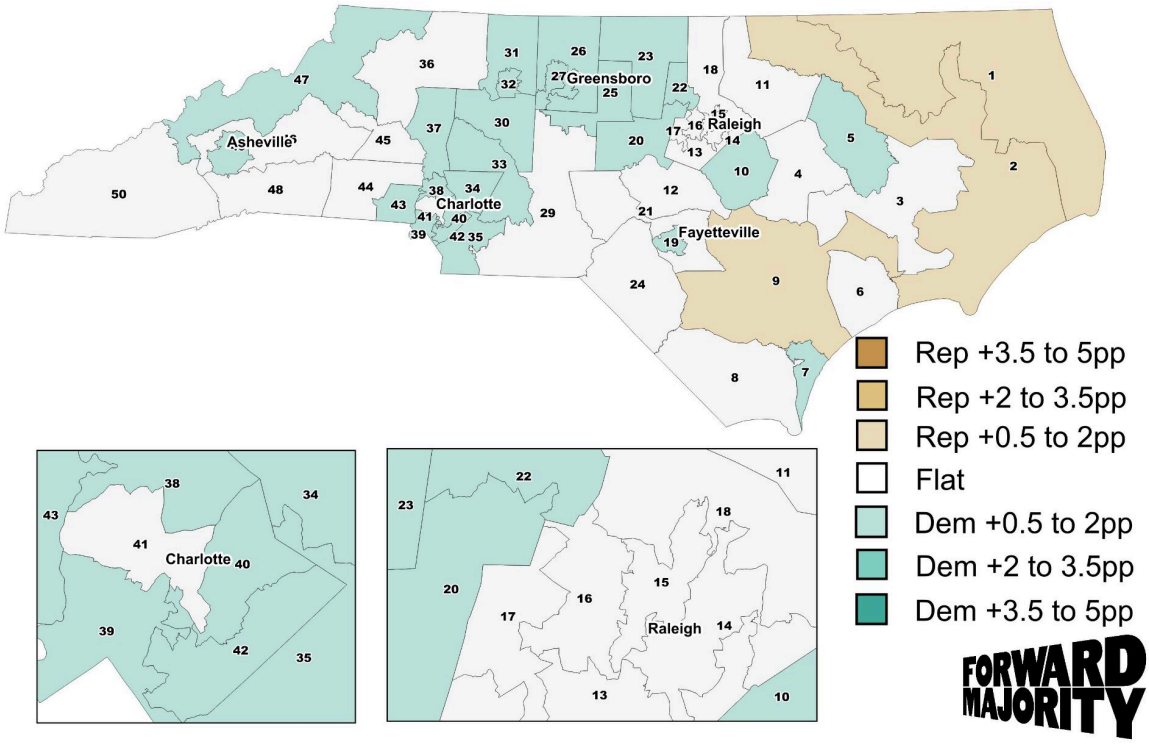
2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
1.2%	0.0%	42.6%	+7.4pp

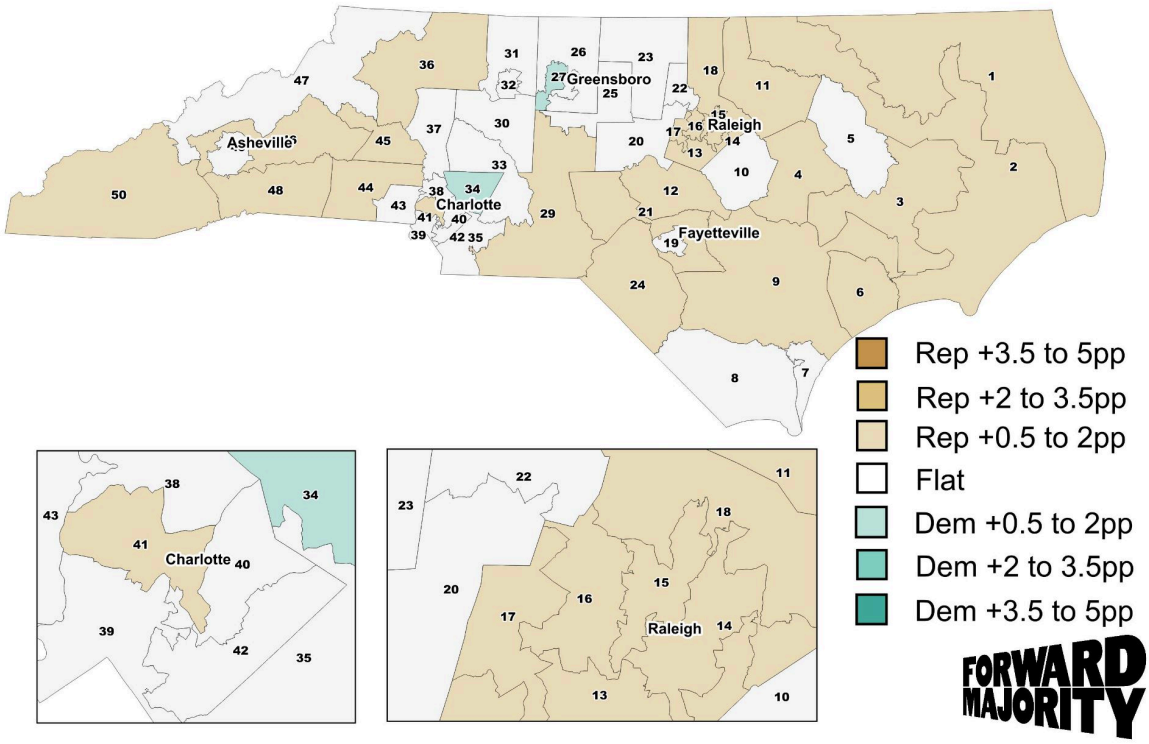
5-YEAR TRENDS

Raw	Relative to Natl Avg
+0.46pp	−0.45pp

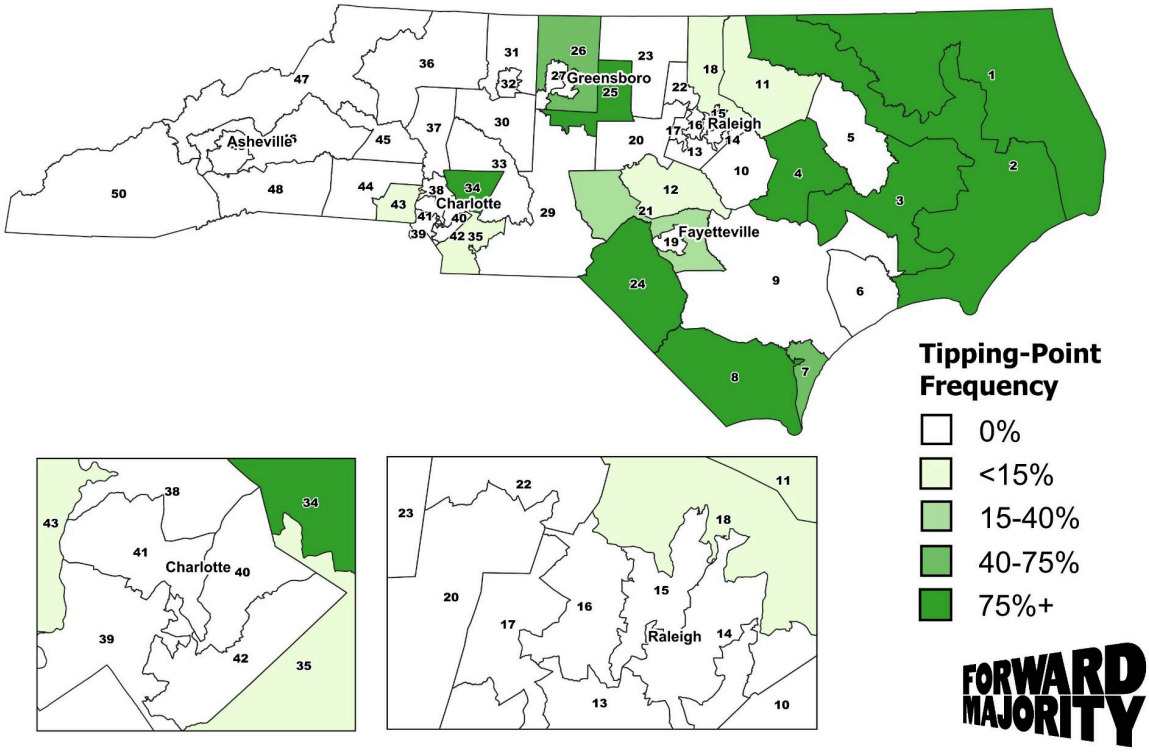
NC State Senate: Raw 5-Year Partisan Trends



NC State Senate: 5-Year Partisan Trends Relative to Natl Avg



North Carolina State Senate: Tipping-Point Districts in 2030



Pennsylvania House

Lean R

2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
39.9%	N/A	49.0%	+1.0pp

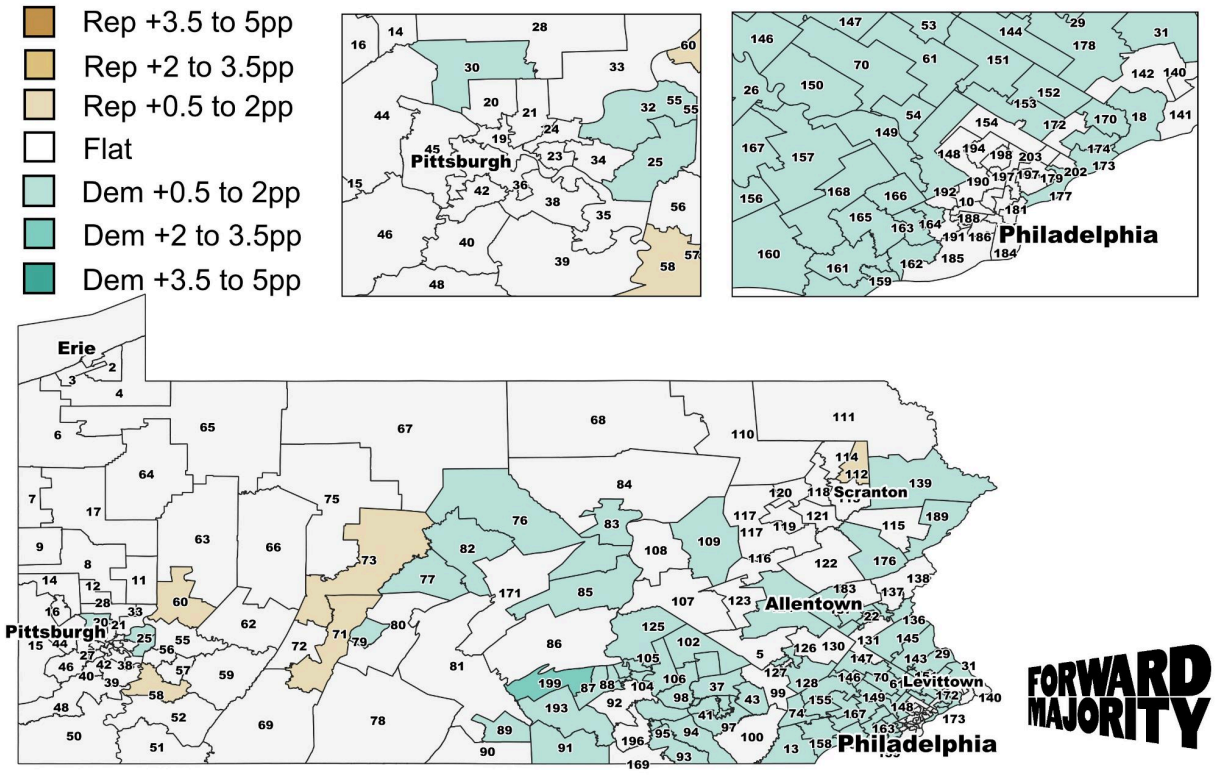
5-YEAR TRENDS

Raw	Relative to Natl Avg
+0.42pp	−0.48pp

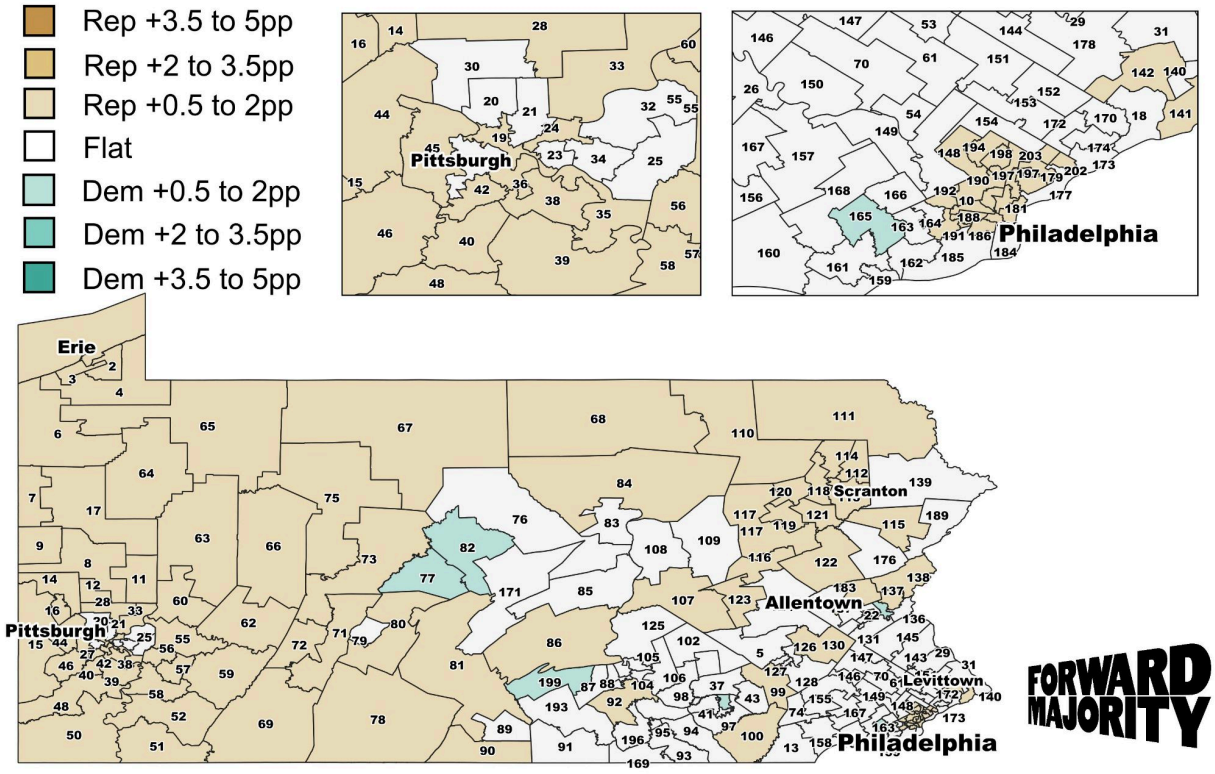
Countervailing forces in Pennsylvania keep the 5-year trends largely flat. 13-17 year olds are only modestly more diverse than the existing electorate and older voters are only modestly more Republican, so generational churn is a net wash. Likewise in-migration is not a major driving force in PA like it is in the sunbelt and southwest.

Within the state, the fastest-changing places are in the Philadelphia suburbs. Central Pennsylvania (around Lancaster and York) and the Lehigh Valley have lesser trends and Philadelphia itself, along with the old industrial areas around Pittsburgh and the northeastern coal region, trail.

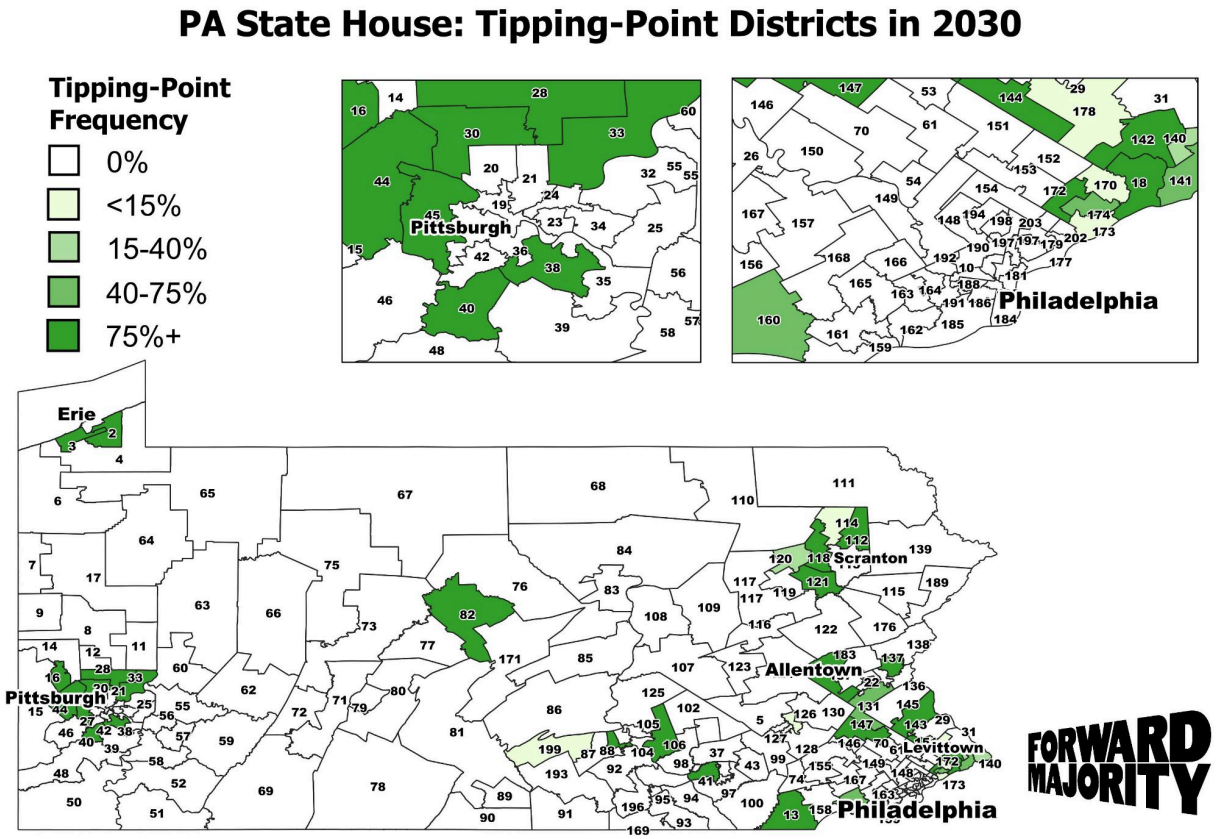
PA State House: Raw 5-Year Partisan Trends



PA State House: 5-Year Partisan Trends Relative to Natl Avg



Tipping-point districts in Pennsylvania are clustered in the Pittsburgh/Allegheny County area in the west and the Philadelphia suburbs (Bucks and Montgomery counties) in the southeast. Ringing those anchors are clusters in Erie, the Scranton/Wilkes-Barre region in the northeast, and the Allentown/Lehigh Valley. The House map adds a few more isolated seats, including one in central Pennsylvania around State College (district 82), but the overall geography of the two chambers is very similar.



Pennsylvania Senate

Lean R

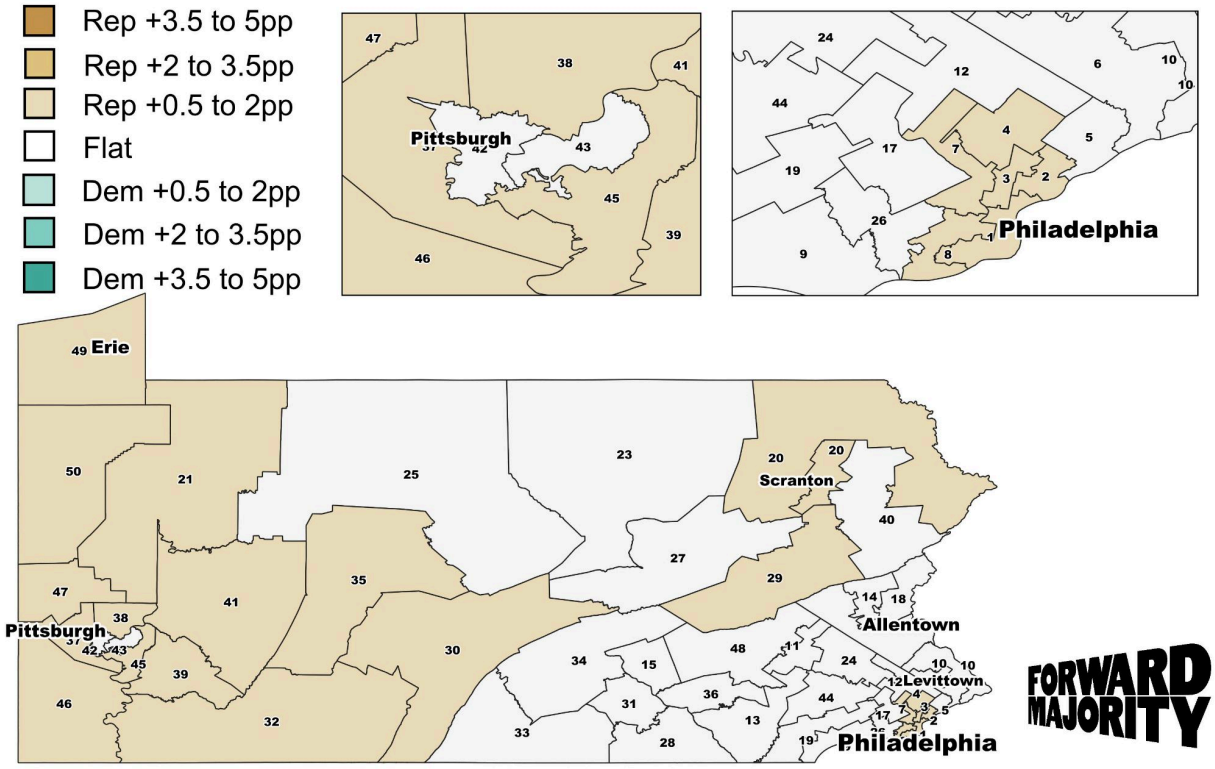
2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
21.5%	8%	47.8%	+2.2pp

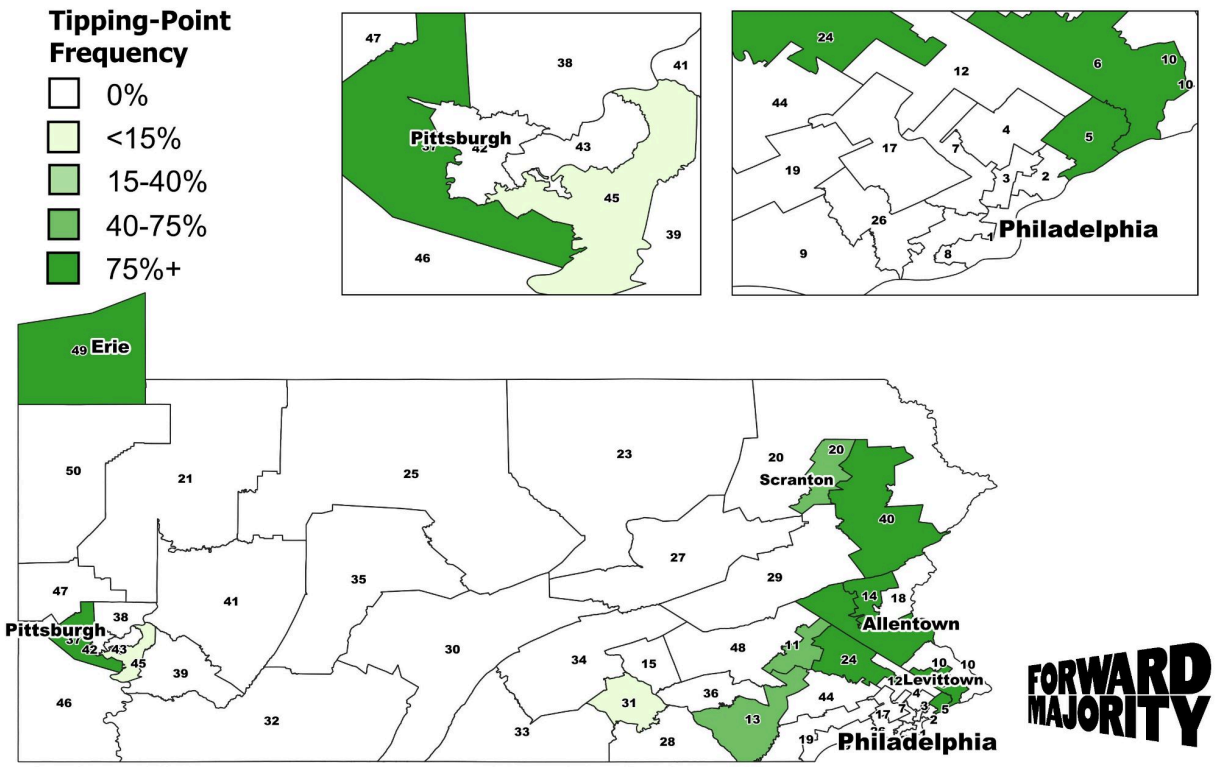
5-YEAR TRENDS

Raw	Relative to Natl Avg
+0.48pp	−0.42pp

PA State Senate: 5-Year Partisan Trends Relative to Natl Avg



PA State Senate: Tipping-Point Districts in 2030



Texas House

Safe R

2030 PROJECTIONS

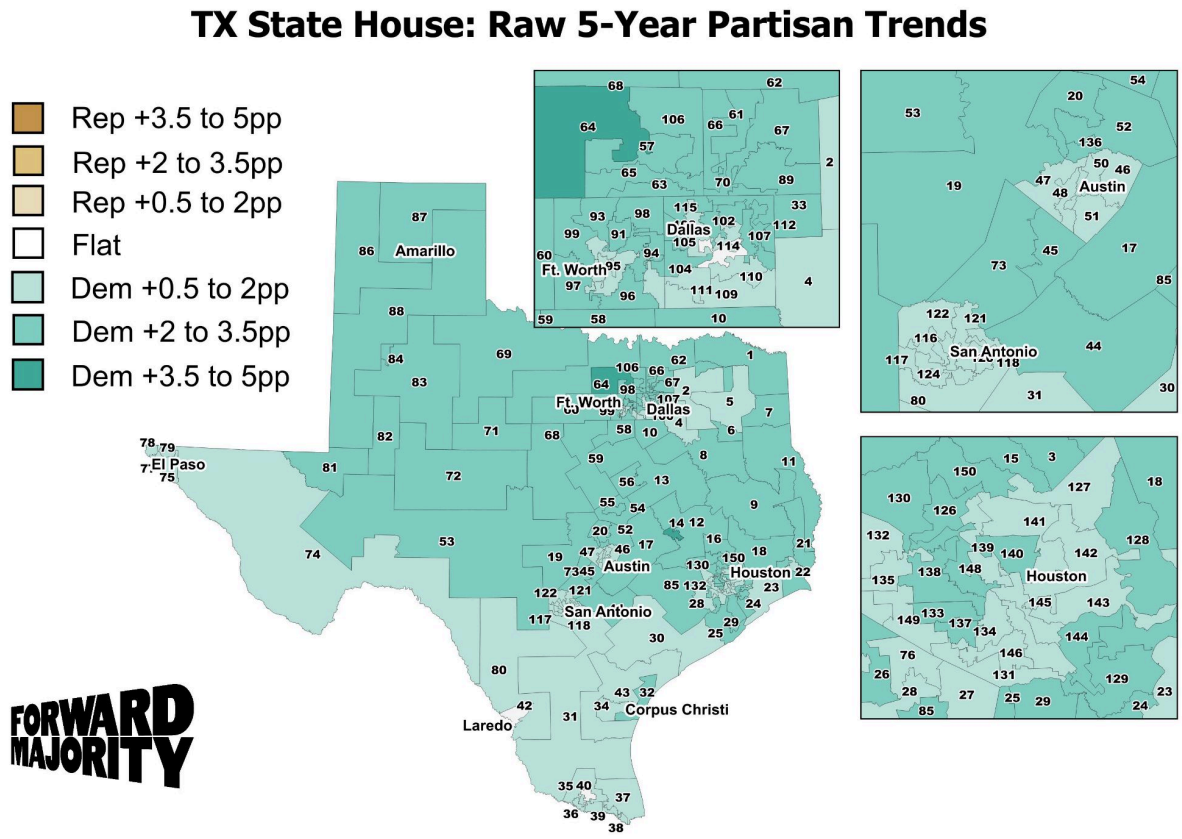
Dem Majority	Tied chamber	Tipping seat	Swing to flip
7.6%	1.6%	45.4%	+4.6pp

5-YEAR TRENDS

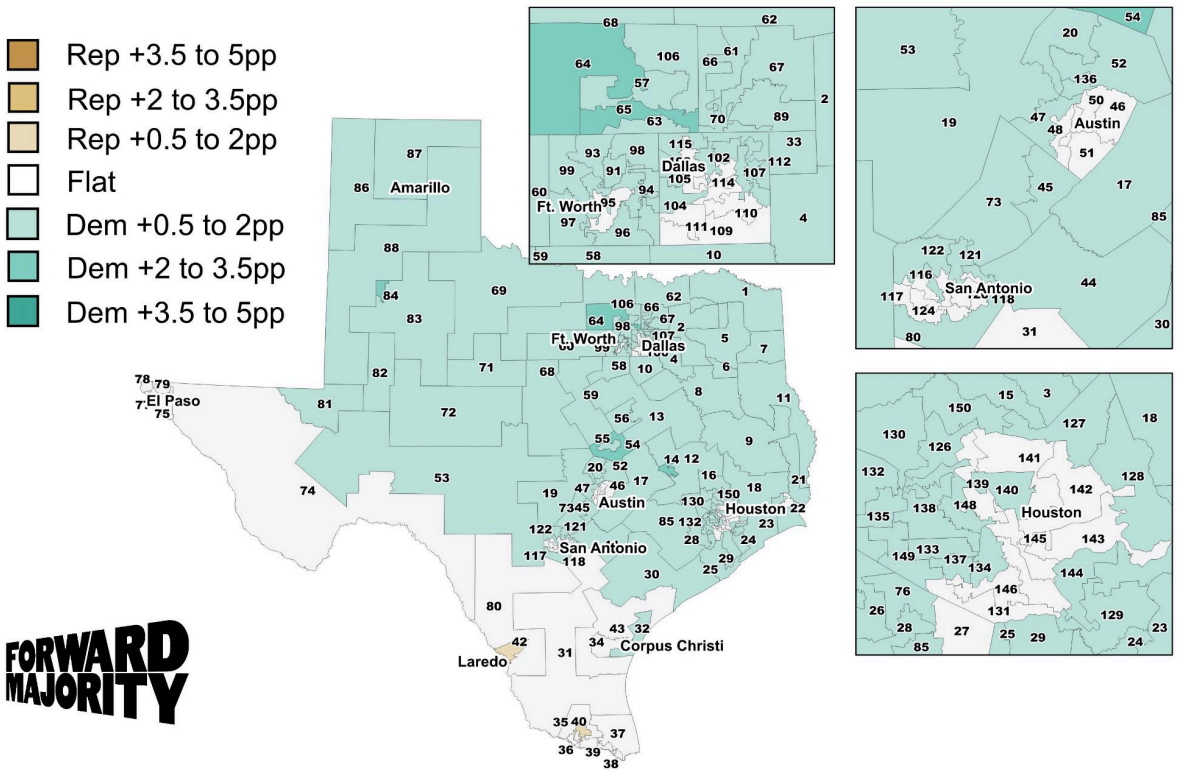
Raw	Relative to Natl Avg
+1.90pp	+0.99pp

What is there to say about Texas? Texas isn't a state it's a continent. Texas has more miles of road than the Roman Empire. Texas has more high school football stadiums than Europe has cathedrals. More languages are spoken in Houston than in France.

The story in Texas is a genuine, large churn in the electorate. Conservative, mostly white older voters passing away and a huge, heavily Latino, strongly Democratic young population (about 59% nonwhite) aging in, plus steady in-migration into the big metros. Within the state, the suburbs ringing Dallas, Houston, and Austin change fastest and draw the most Democratic newcomers. The big cities themselves are already heavily Democratic and move less while the heavily Latino border region changes more slowly, with the area around Laredo lagging the most, as its newcomers are less Democratic than longtime residents.

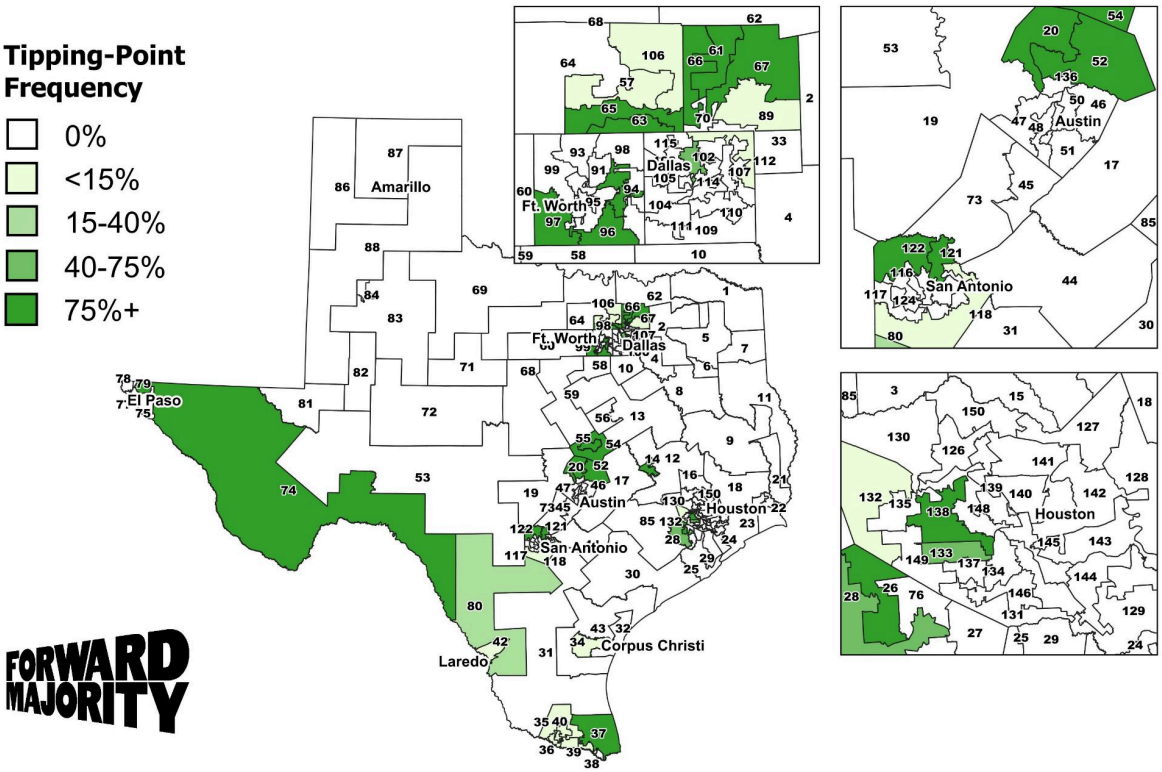


TX State House: 5-Year Partisan Trends Relative to Natl Avg



The tipping-point districts in Texas cluster in and around the major metros. Dallas/Fort Worth carries the largest concentration, followed by Houston, Austin, and San Antonio. Beyond the cities, distinct clusters appear in El Paso and far West Texas (including the huge rural district 74) and in South Texas and the Rio Grande Valley near the border.

Texas State House: Tipping-Point Districts in 2030



Virginia House of Delegates

Safe D

2030 PROJECTIONS

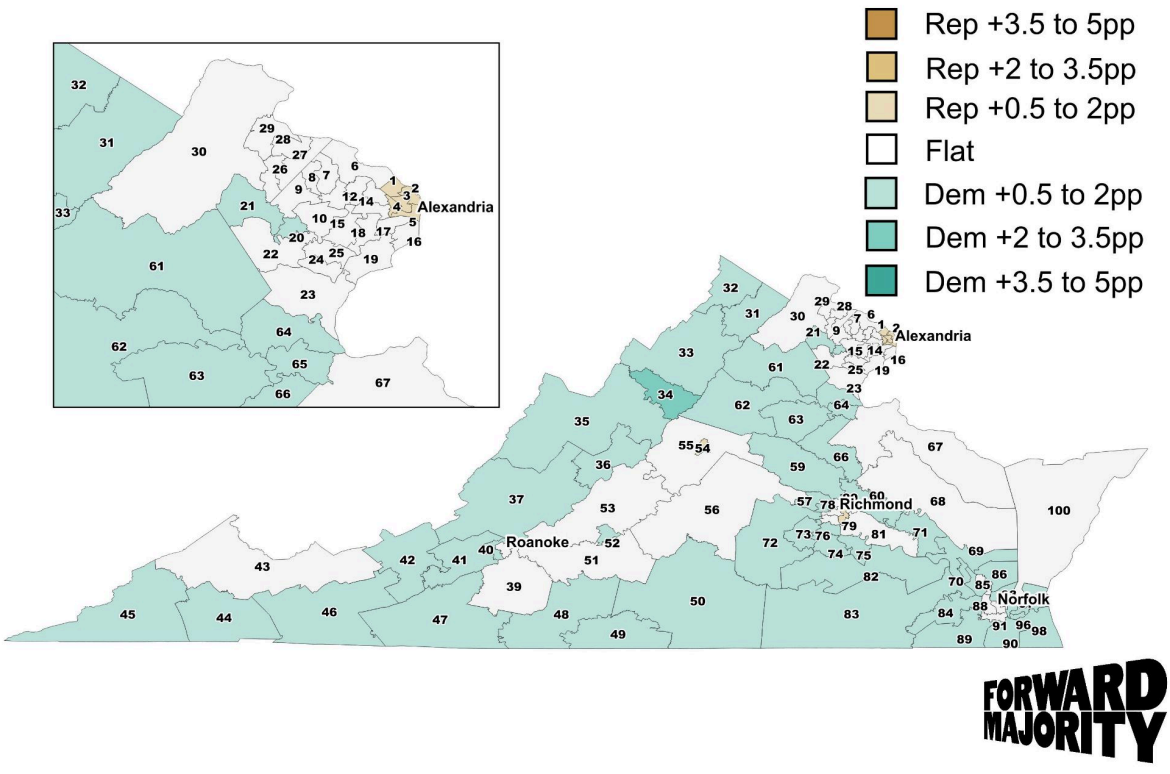
Dem Majority	Tied chamber	Tipping seat	Swing to flip
95%	2.6%	55.0%	−5.0pp

5-YEAR TRENDS

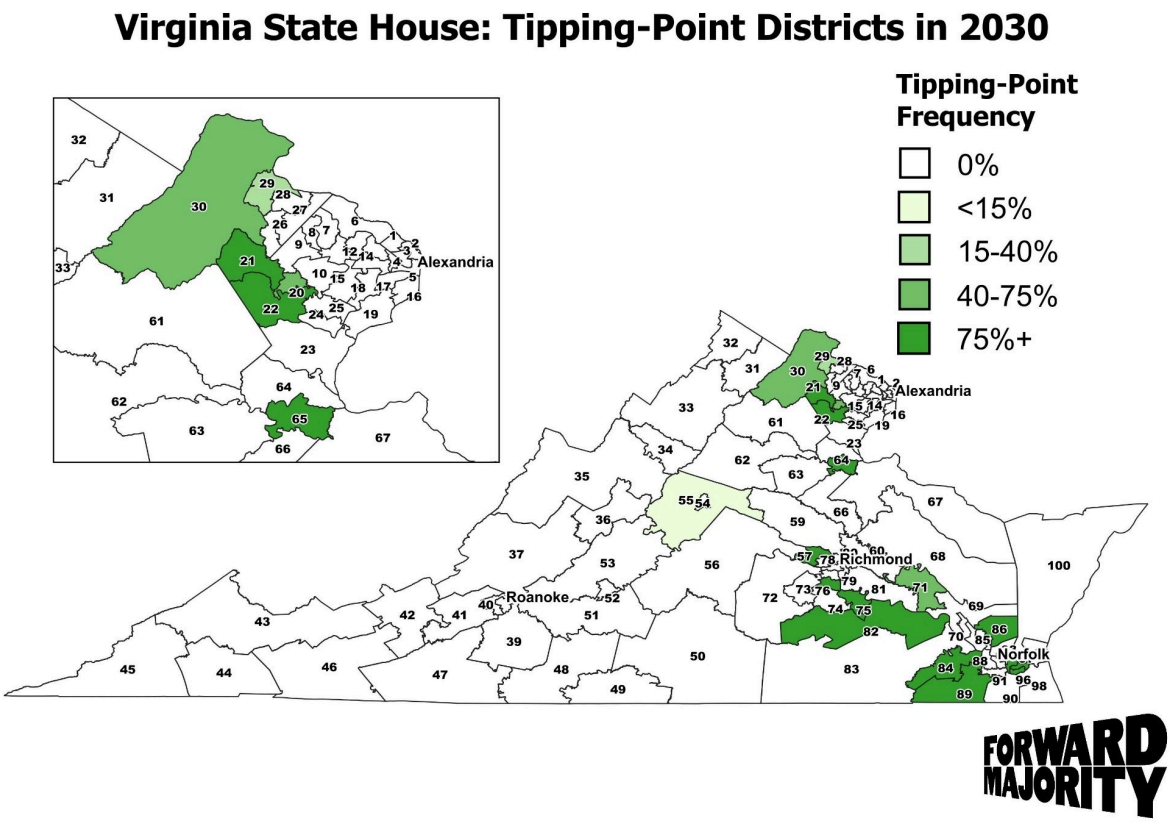
Raw	Relative to Natl Avg
+1.37pp	+0.47pp

Virginia is trending Democratic ahead of the national average with mortality of more conservative older voters combined with heavily Democratic-leaning in-migration driving the change. Within the state, the fastest-changing areas are the Hampton Roads region (Virginia Beach, Norfolk) and the Richmond suburbs. The Washington, D.C. suburbs of Northern Virginia are relative laggards as they're already so heavily Democratic that newcomers don't move the needle. Richmond and Norfolk are likewise near their ceiling, while the Fredericksburg exurbs and the rural south move modestly Democratic from a more Republican starting point.

VA State House: 5-Year Partisan Trends Relative to Natl Avg



Tipping-point districts in VA are concentrated in the Northern Virginia exurbs: primarily Prince William and Loudoun counties, followed by the suburbs of Richmond and the Hampton Roads/Virginia Beach area in the southeast.



Virginia Senate

Safe D

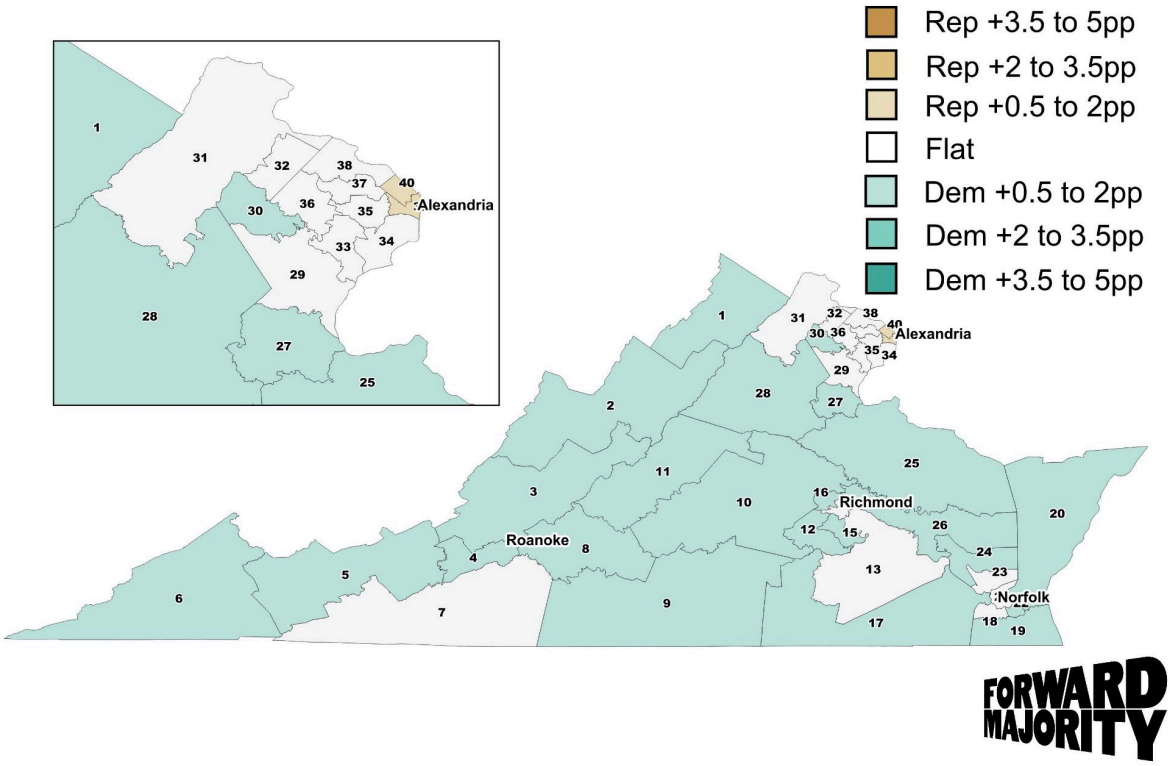
2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
91.7%	3.3%	55.8%	−5.8pp

5-YEAR TRENDS

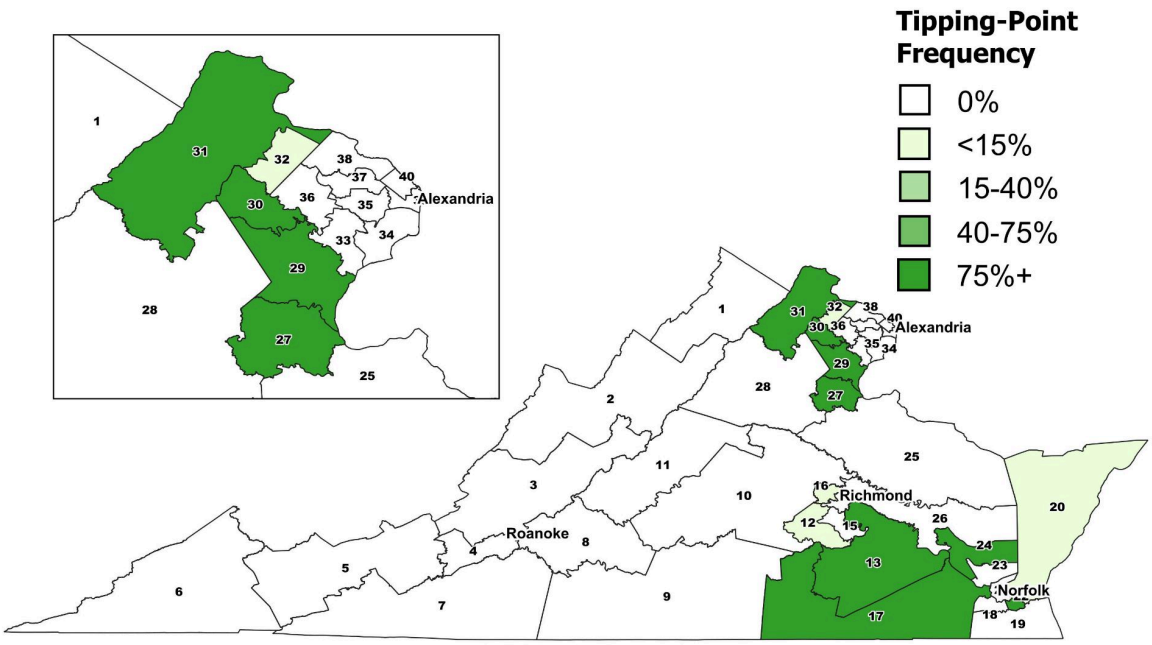
Raw	Relative to Natl Avg
+1.47pp	+0.57pp

VA State Senate: 5-Year Partisan Trends Relative to Natl Avg



FORWARD MAJORITY

Virginia State Senate: Tipping-Point Districts in 2030



FORWARD MAJORITY

WI Assembly

Lean R

2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
32.6%	N/A	48.3%	+1.7pp

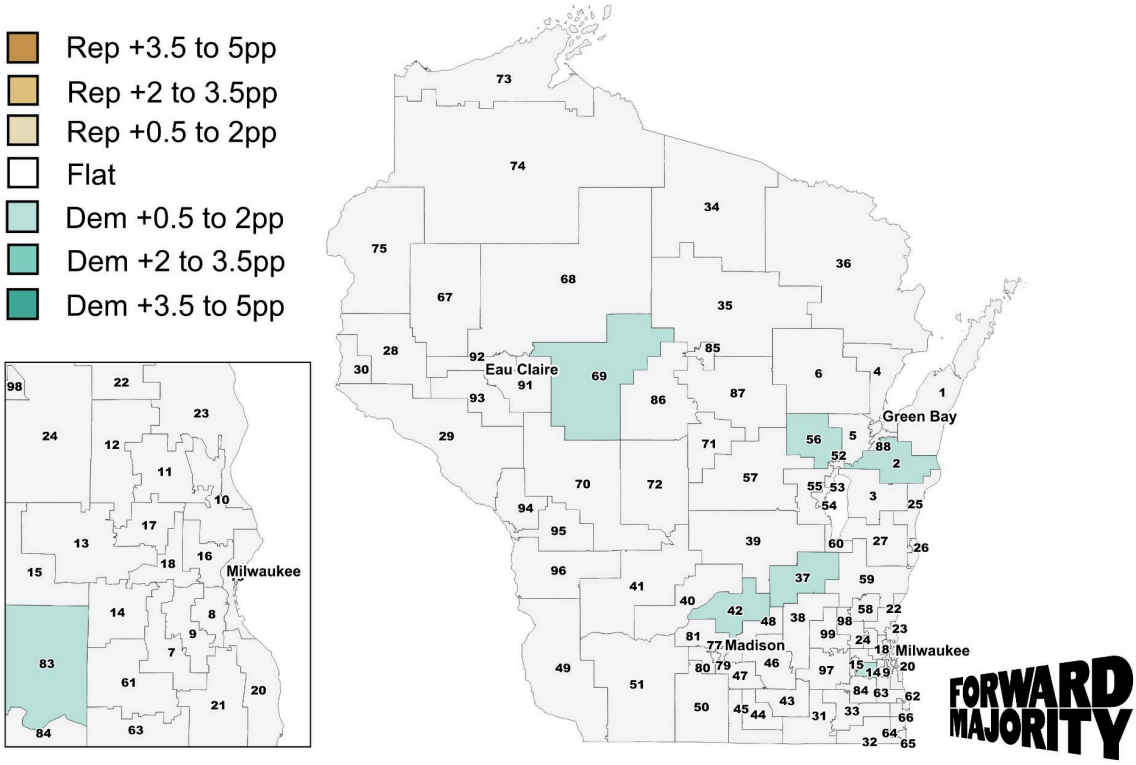
5-YEAR TRENDS

Raw	Relative to Natl Avg
+0.27pp	−0.63pp

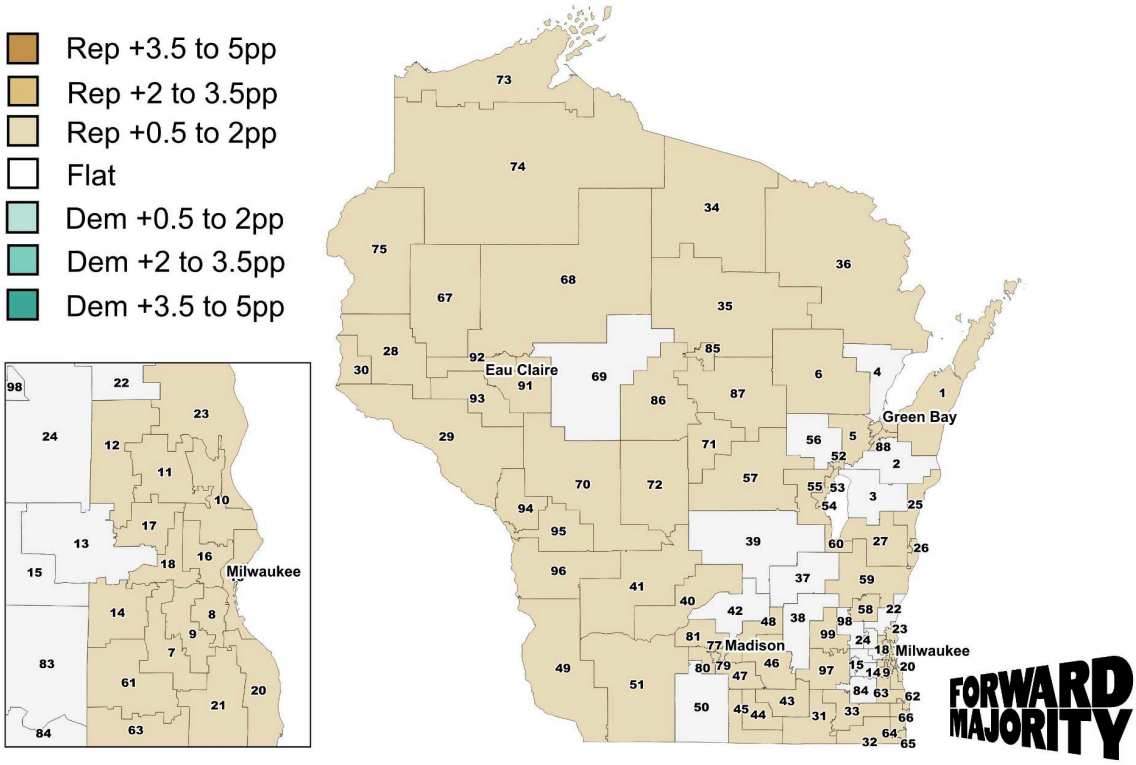
Like other midwestern states a more static population in Wisconsin means raw trends are weak in the state. It lags the national average because it's fairly white with little diversity among its incoming young voters, so generational replacement does little. The main trend driver is older, whiter, slightly-Republican voters passing away.

Within the state, there's little regional variation: most areas barely move, with modest Democratic bright spots in the Fox Valley and around Green Bay and a few suburban areas, while Milwaukee and Madison are already heavily Democratic and flat.

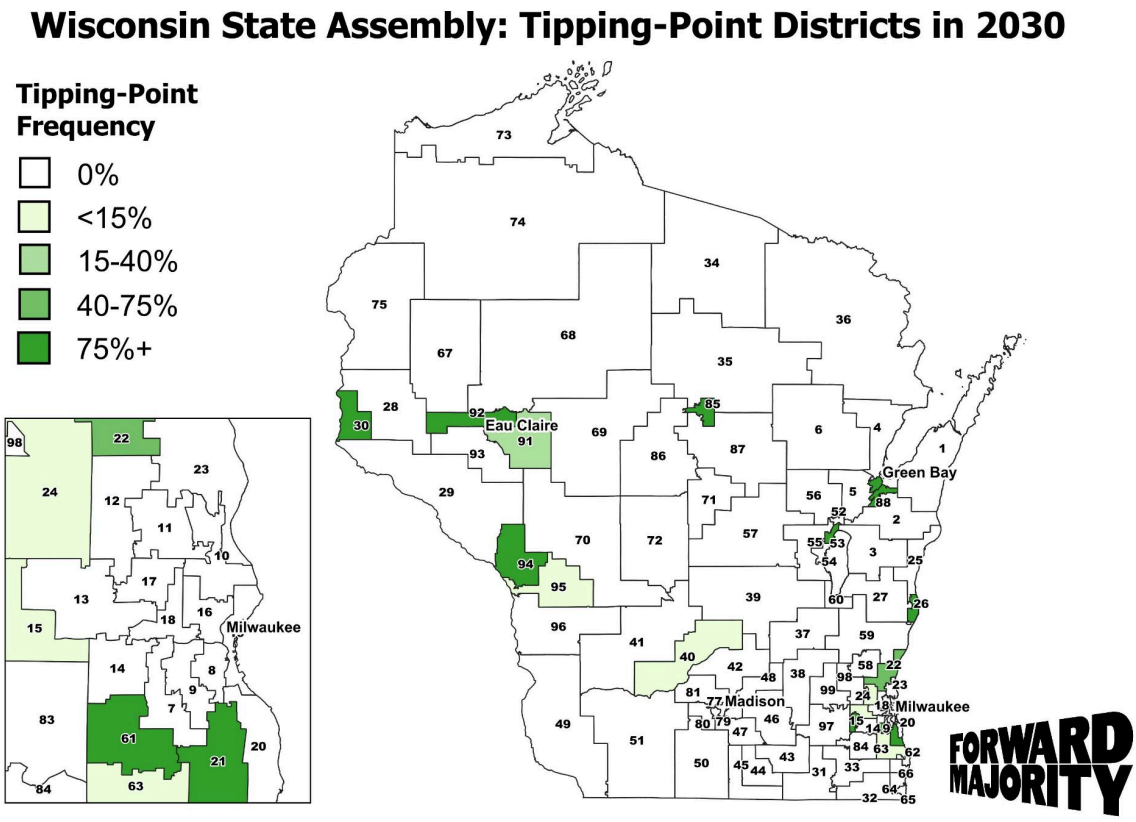
WI State Assembly: 5-Year Partisan Trends Relative to Natl Avg



WI State Assembly: 5-Year Partisan Trends Relative to Natl Avg



Tipping-point districts cluster around the Milwaukee suburbs, the Madison area, Eau Claire, and Green Bay, plus a band of seats across western Wisconsin near La Crosse. The Senate leans a more on the western Wisconsin seats (districts 32, 14, 17).



Wisconsin Senate

Tossup

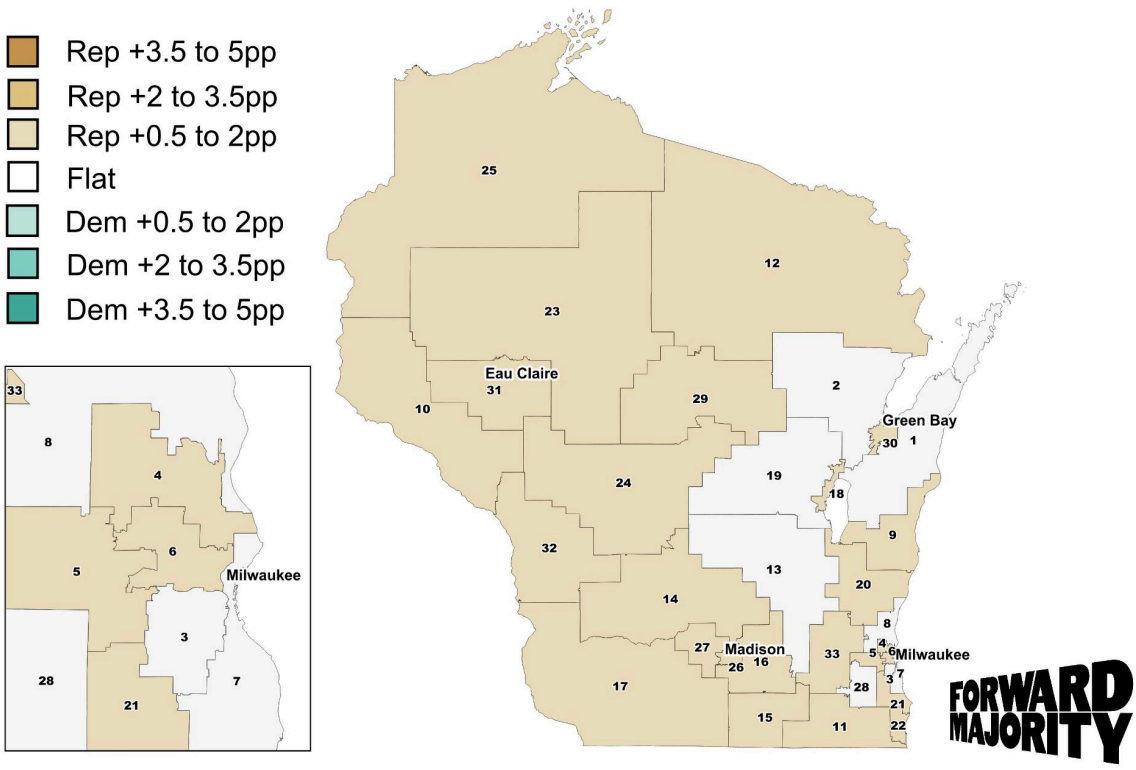
2030 PROJECTIONS

Dem Majority	Tied chamber	Tipping seat	Swing to flip
48.1%	N/A	49.7%	+0.3pp

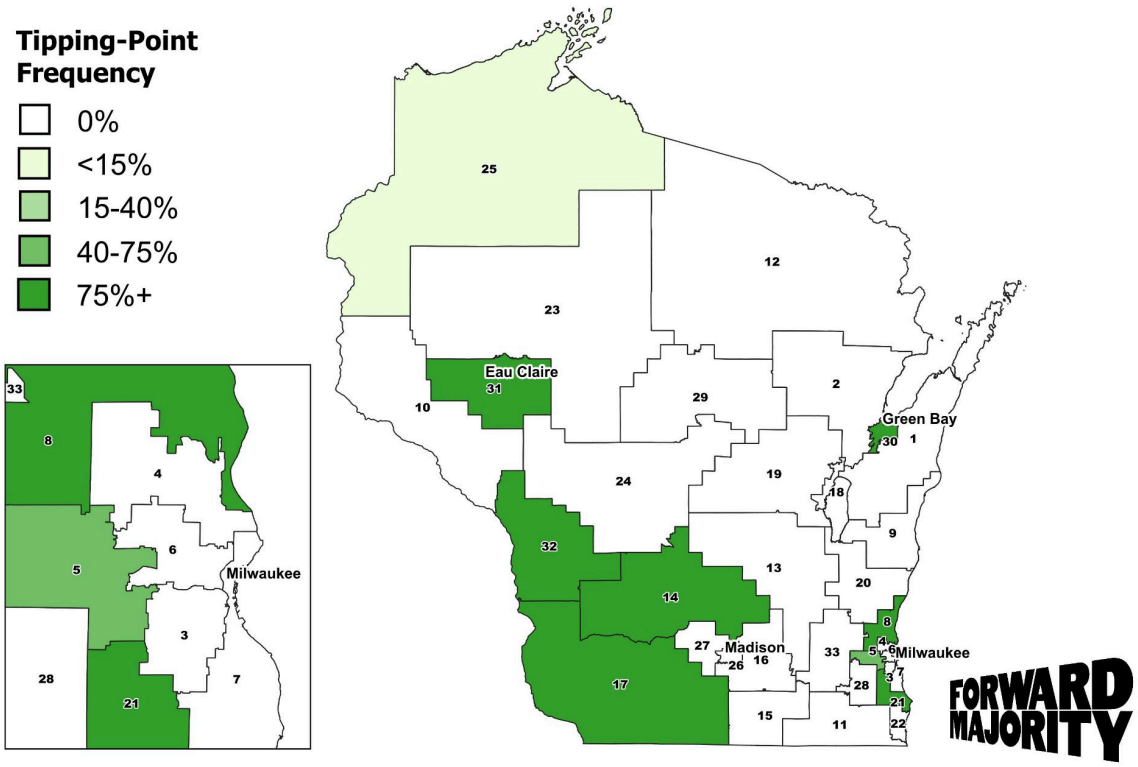
5-YEAR TRENDS

Raw	Relative to Natl Avg
+0.32pp	−0.58pp

WI State Senate: 5-Year Partisan Trends Relative to Natl Avg



Wisconsin State Senate: Tipping-Point Districts in 2030



What's New in the 2026 Model

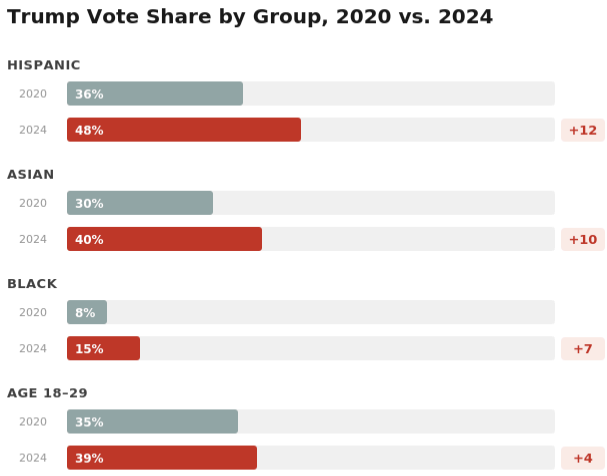
Our 2026 model incorporates new state legislative maps in GA, MI, NC, and WI. Other improvements include:

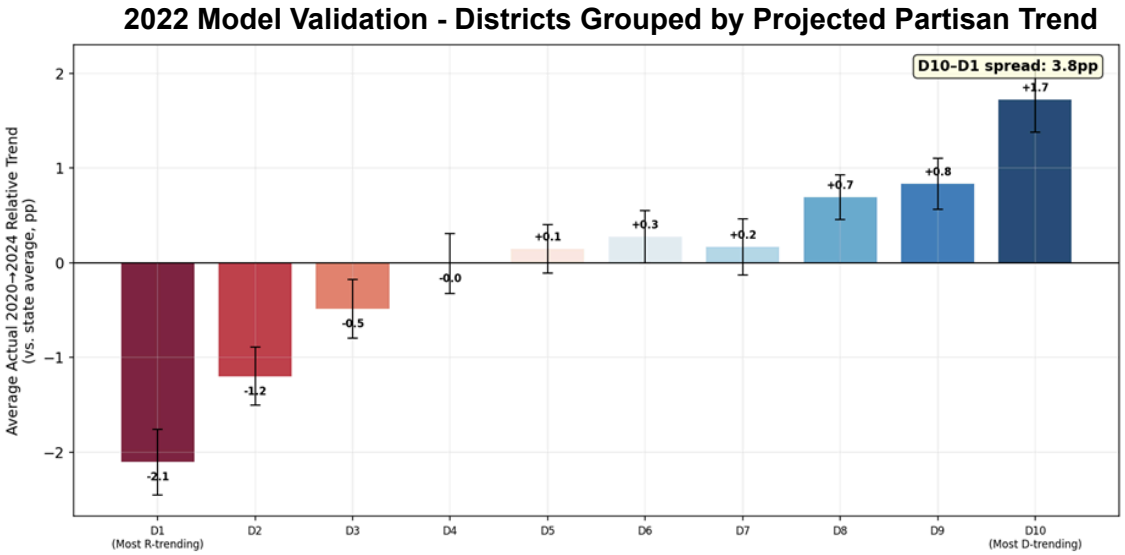
- **Race-Differentiated Mortality:** Incorporated more granular CDC data to differentiate mortality by race/ethnicity, age, and gender.
- **Modeled Out-Movers:** Every voter gets a probability of departure based on county-level ACS data and demographic characteristics.
- **More Balanced Scenarios:** Increased number of scenarios from 140 to 574 and improved rigor of the balance-check to ensure scenarios do not bias projected outcomes.

The most significant new opportunity for Democrats is Wisconsin where new maps make both the Assembly and the Senate competitive through 2030. Even in tough chambers like the Texas House the model allows us to map a path to a majority. Democrats reach majority control of the TX House in 8% of scenarios in 2030, albeit all of them in favorable years for Democrats.

Validating the Previous District Model

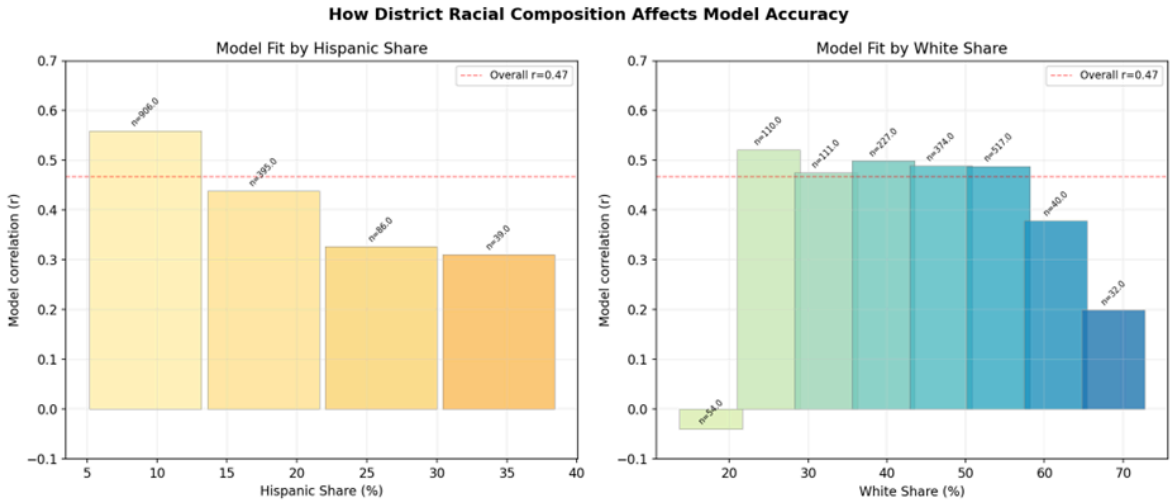
This approach has known limitations. Demographic characteristics are imperfect predictors of behavior (and past performance is no guarantee of future results). Even if they were perfect predictors, we know from our research in 2021 that uniform swing (ie the "national mood") and voter realignment have a much larger impact on election outcomes in any given year than underlying demographic trends. 2024 would seem to be an election year designed to drive this point home. A number of traditionally Democratic-leaning cohorts swung hard toward Trump. Did our model hold up?



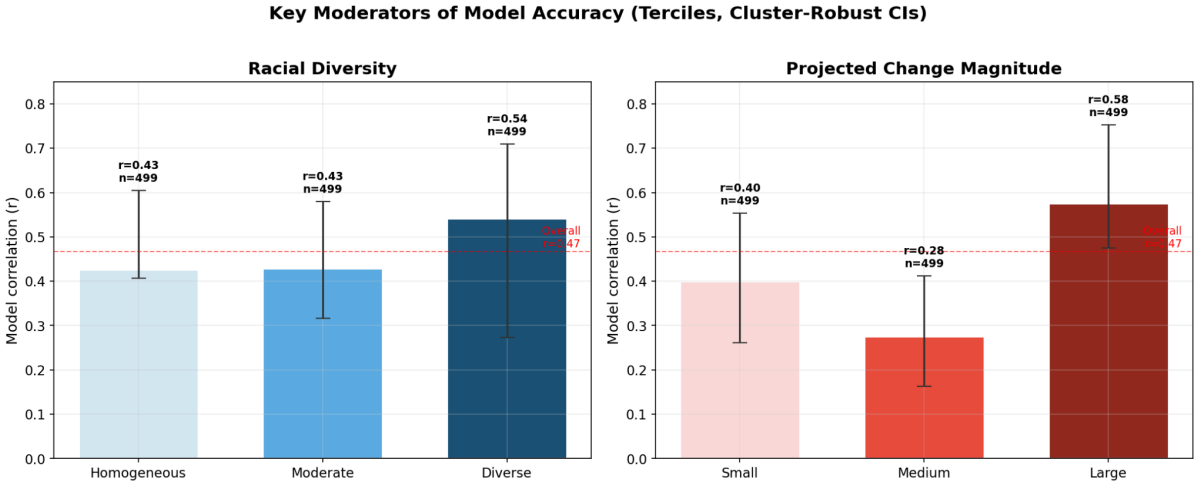


The best way to measure the predictive power of our model is to compare its predictions to actual election results. The chart above shows our 2022 model broken into ten deciles by projected trends from trending strongly Republican to strongly Democratic. We compared our predictions to actual 2020 and 2024 presidential results. The stair-step pattern, while not strictly monotonic, still indicates a good fit between our model and the actual partisan trends of districts.

The model explains 22% of the variation between districts (r=0.47, n=1,497). The model correctly predicted the direction of a district's relative trend 66% of the time. For districts where the model projected at least 1 point of movement, it correctly identified the direction 81% of the time (n=507).



The model did have some weak spots. Unsurprisingly, our model performed poorly in districts with singularly large Hispanic populations (given the large shift in vote choice in 2024). It also performed poorly in >65% White districts. This stands to reason - in places with little demographic diversity, there is less traction for our model so other factors dominate.



The model performed best in districts that are more racially diverse and those where we predicted bigger trends (in either direction). This is good news given the strategic purpose of the model: it's most predictive in the kinds of dynamic, changing environments that represent both emerging threats and emerging opportunities for Democrats.