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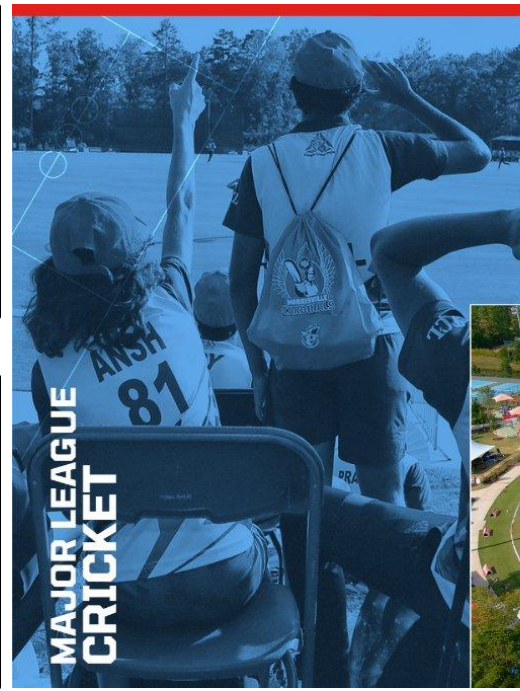


North Carolina continues to grow.

West v. East political divide replaced by Urban v. Rural with Suburbs the battleground.

North Carolina continues to diversify.

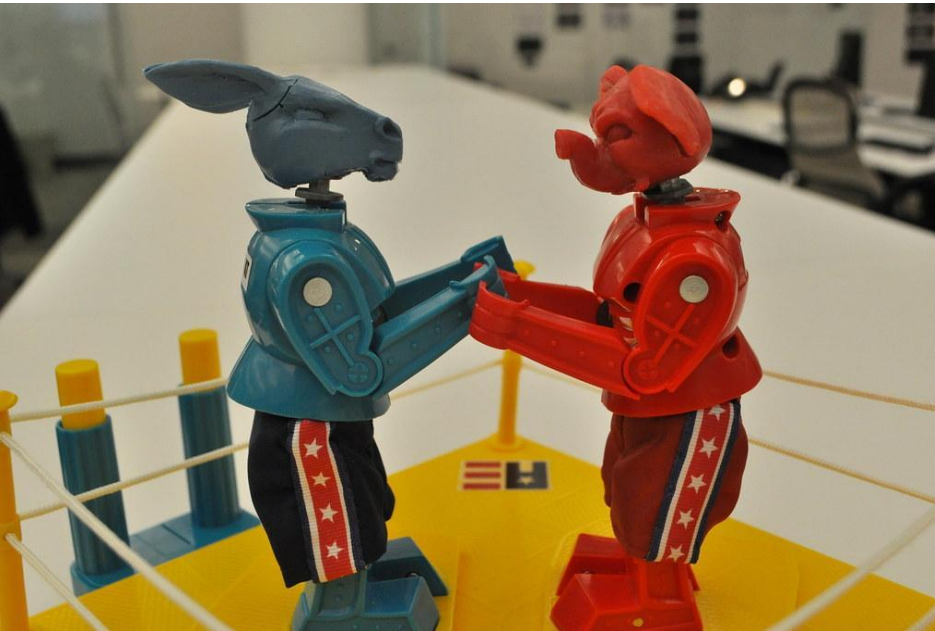
Our Esse is not TO BE best in 'Sleepy South,' but rather TO BE a globally competitive part of the world.



STADIUM EXPANSION



MORRISVILLE, NORTH CAROLINA
#MLC // majorleaguecricket.com



Partisan identities and ideological definitions change.

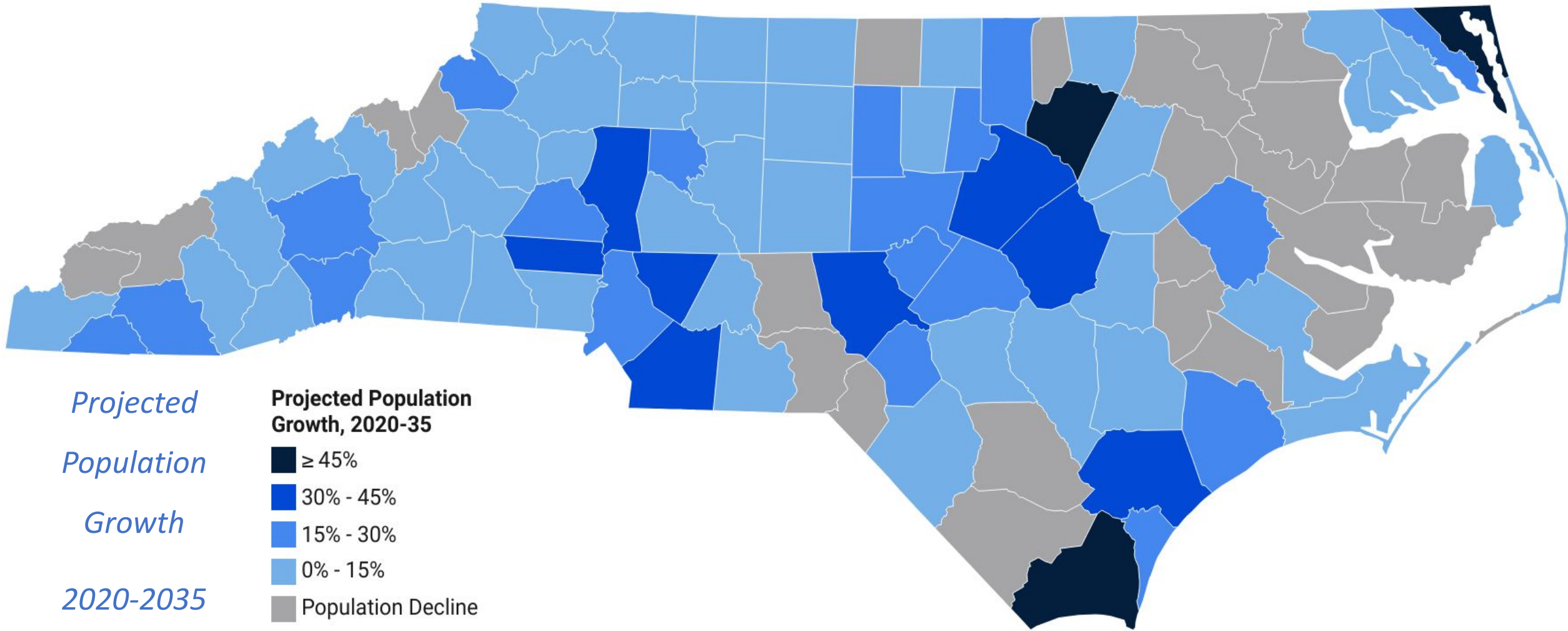
Younger generation North Carolina voters think about public policy issues differently, and consume political content in very different ways.



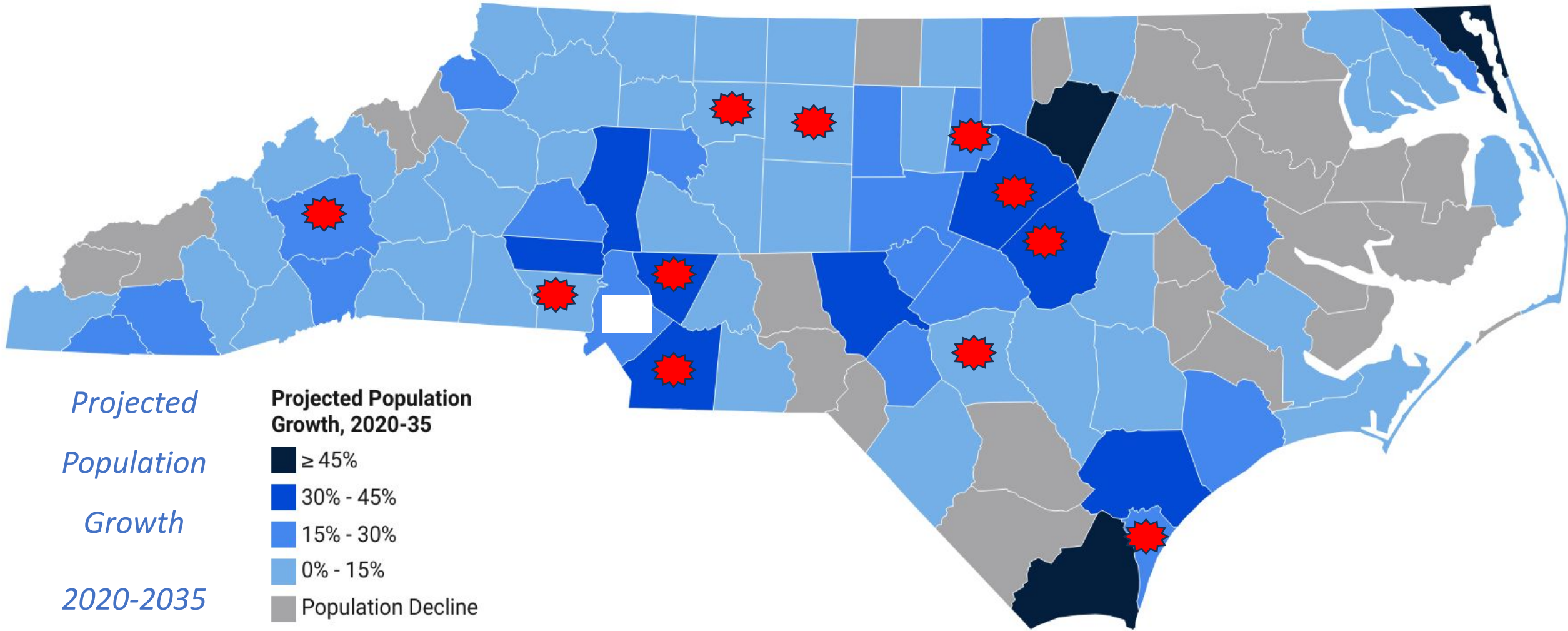
Continued technology-driven change.

George Jetson turns 3 years old in 2025.

Population growth will continue to be uneven

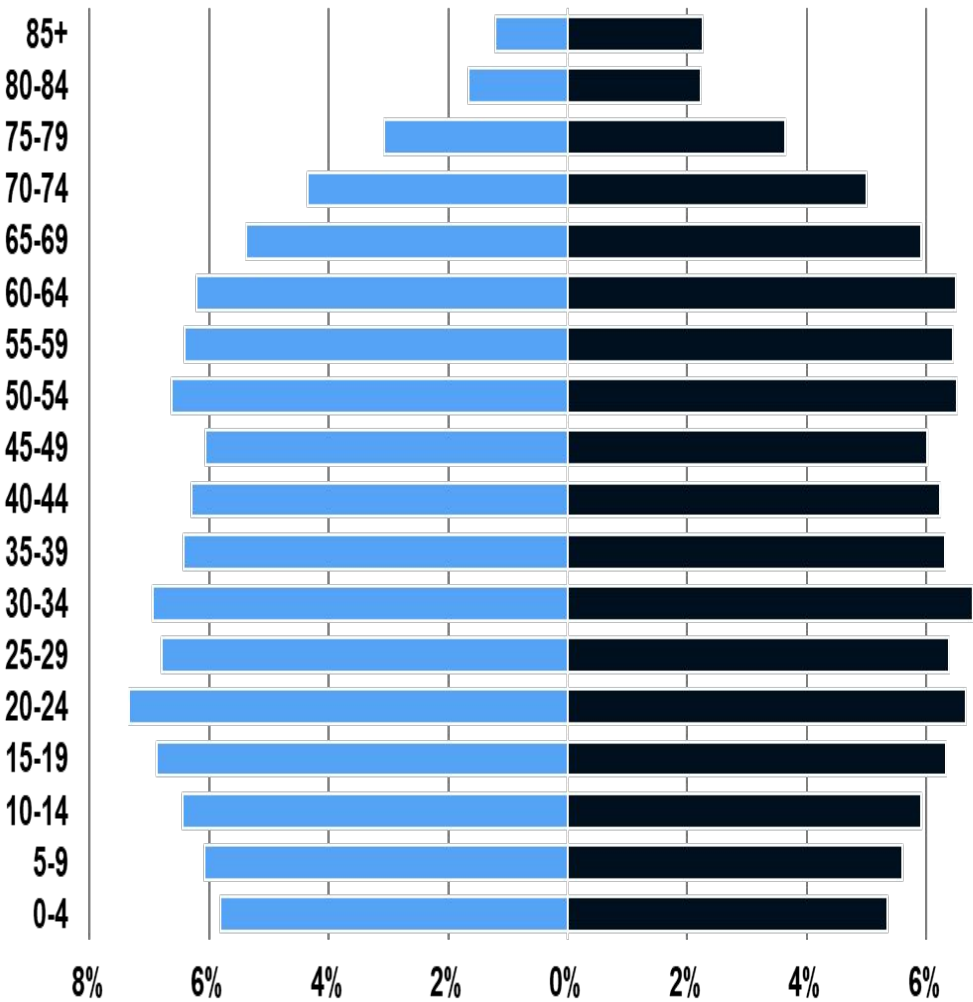


Population growth will continue to be uneven



Population age structure by sex, 2022

Male Female

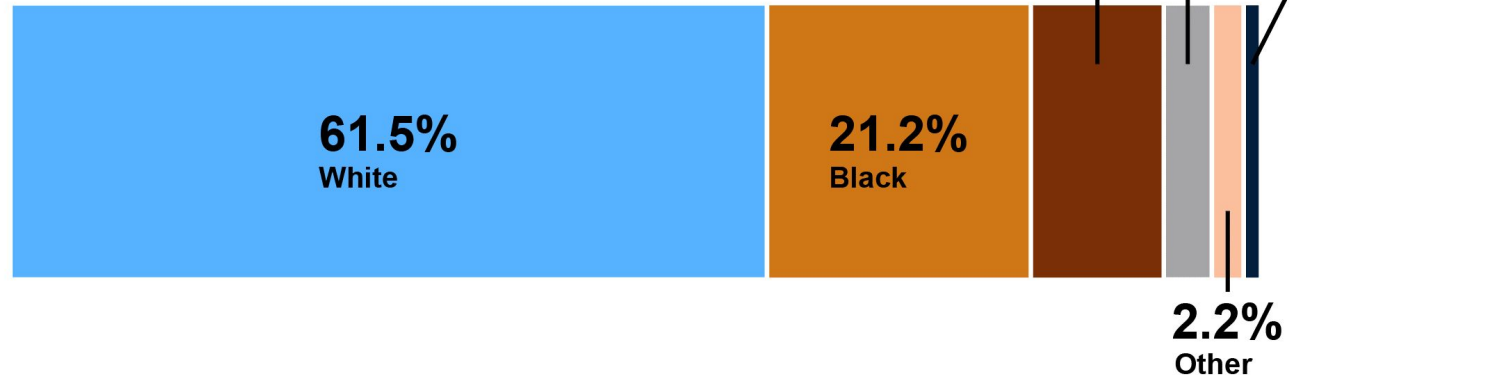


Median Age

39.3

We are getting older and more diverse

Racial/Ethnic Composition of Overall NC Population, 2022

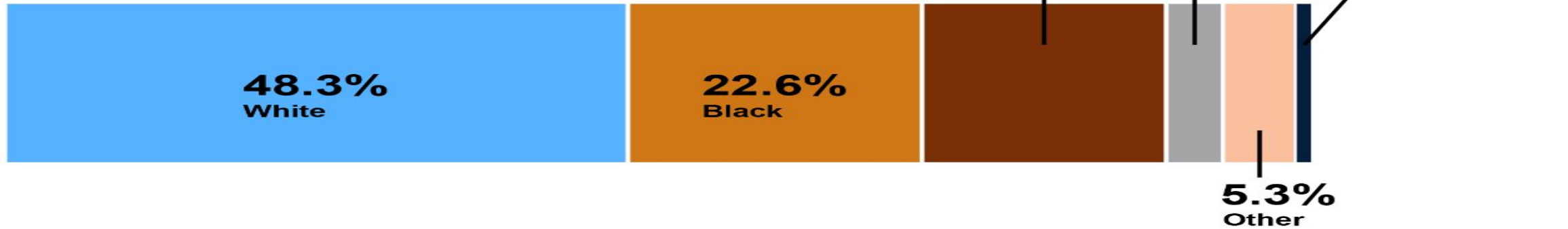


Pre-School Aged Kids are the most diverse

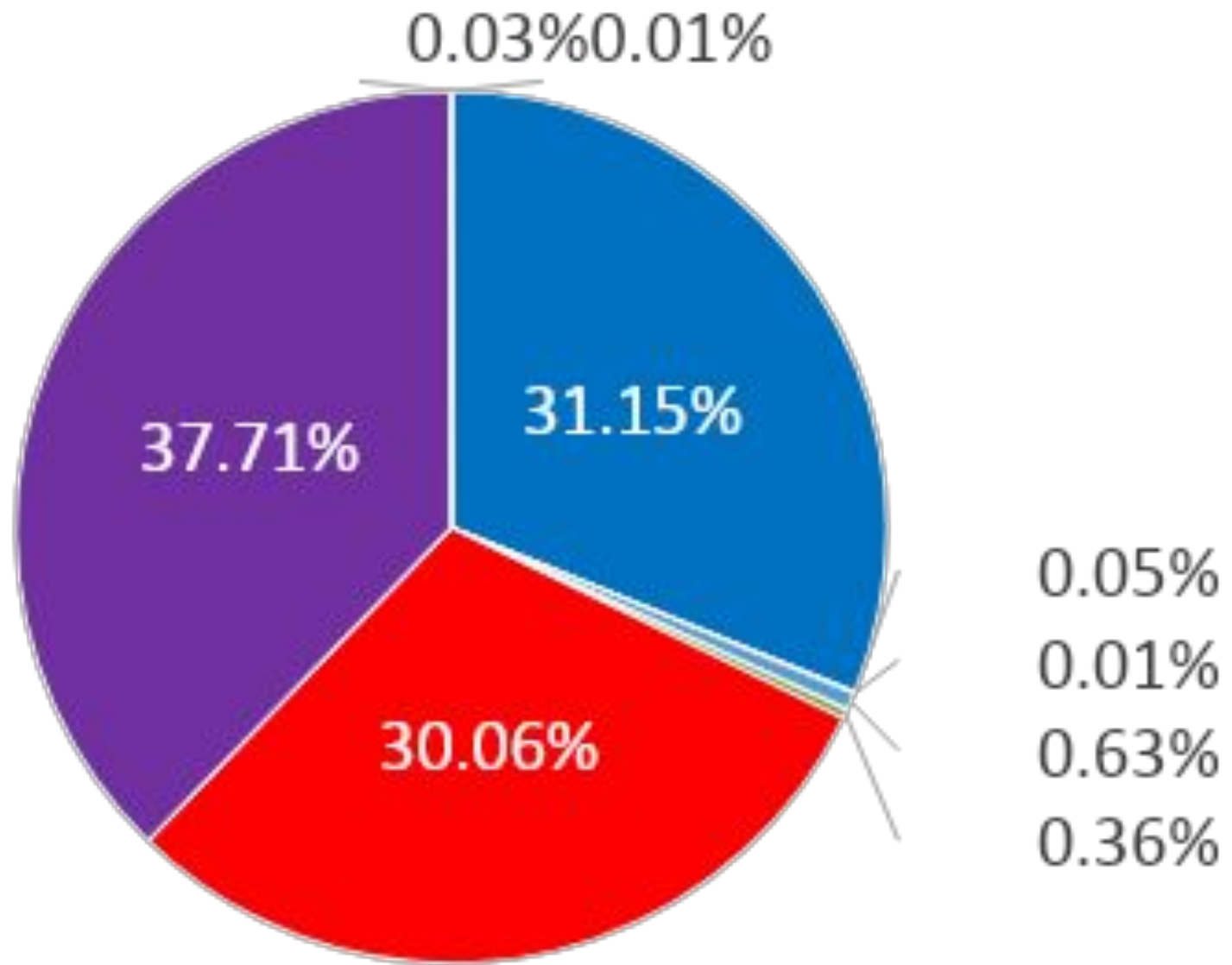
Racial/Ethnic Composition of Overall NC Population



Racial/Ethnic composition of ages 0-4

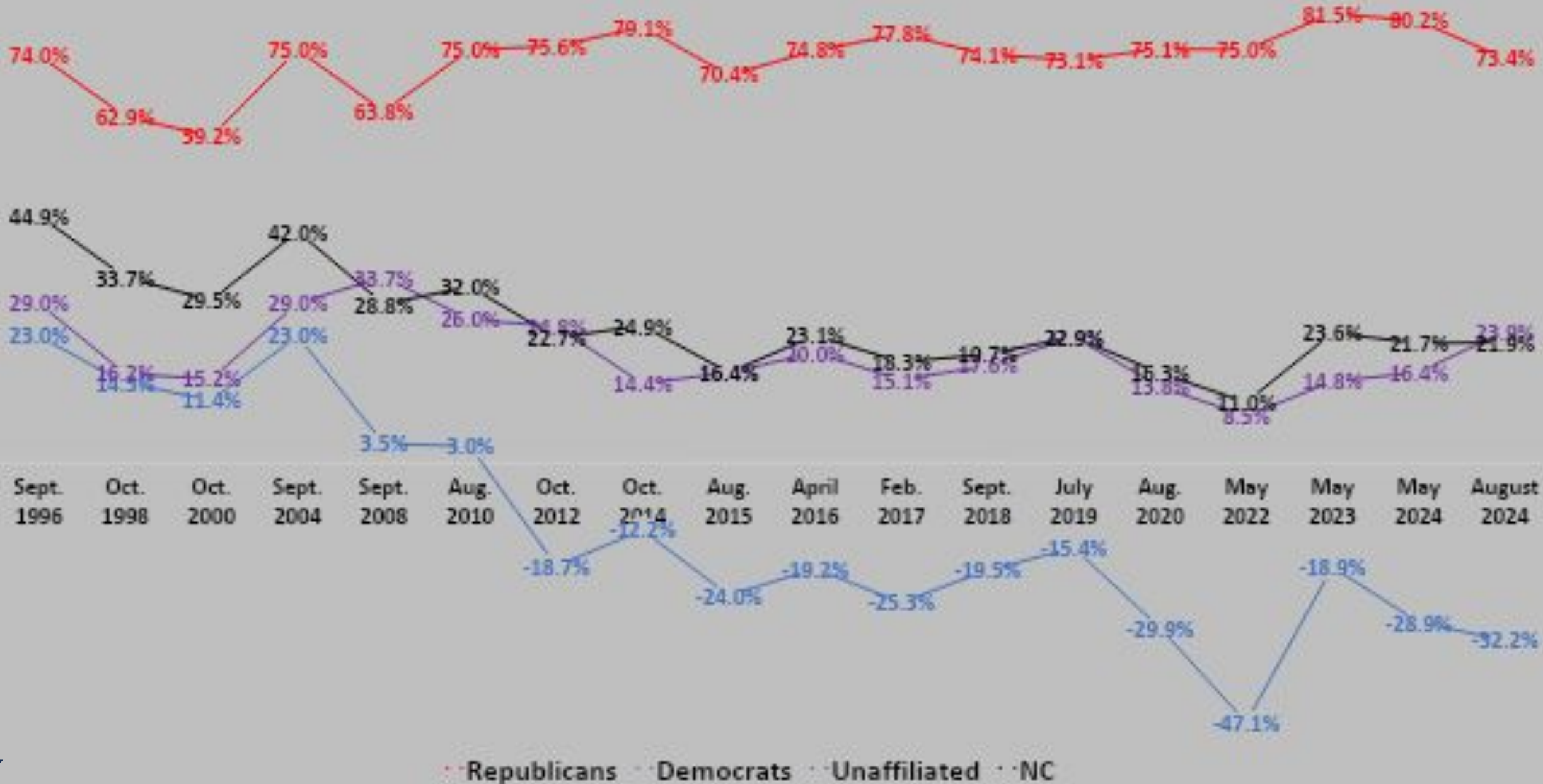


Partisan Affiliation among NC Voters 2025



■ CONT ■ DEM ■ GREEN ■ JUSTICE FOR ALL ■ LIB ■ NO LABELS ■ REP ■ UNA ■ WTP

Ideological shift (courtesy Capital Communications)

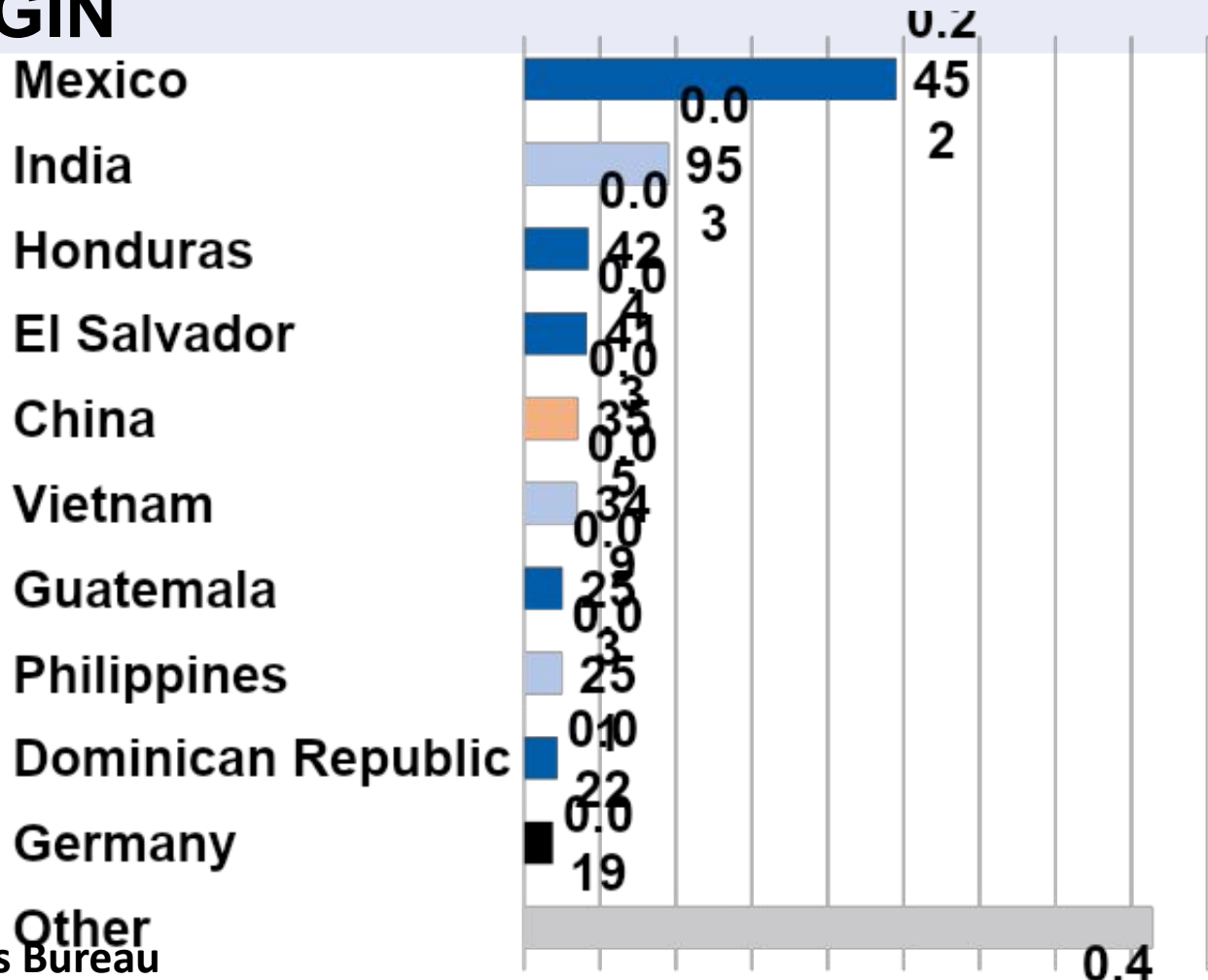
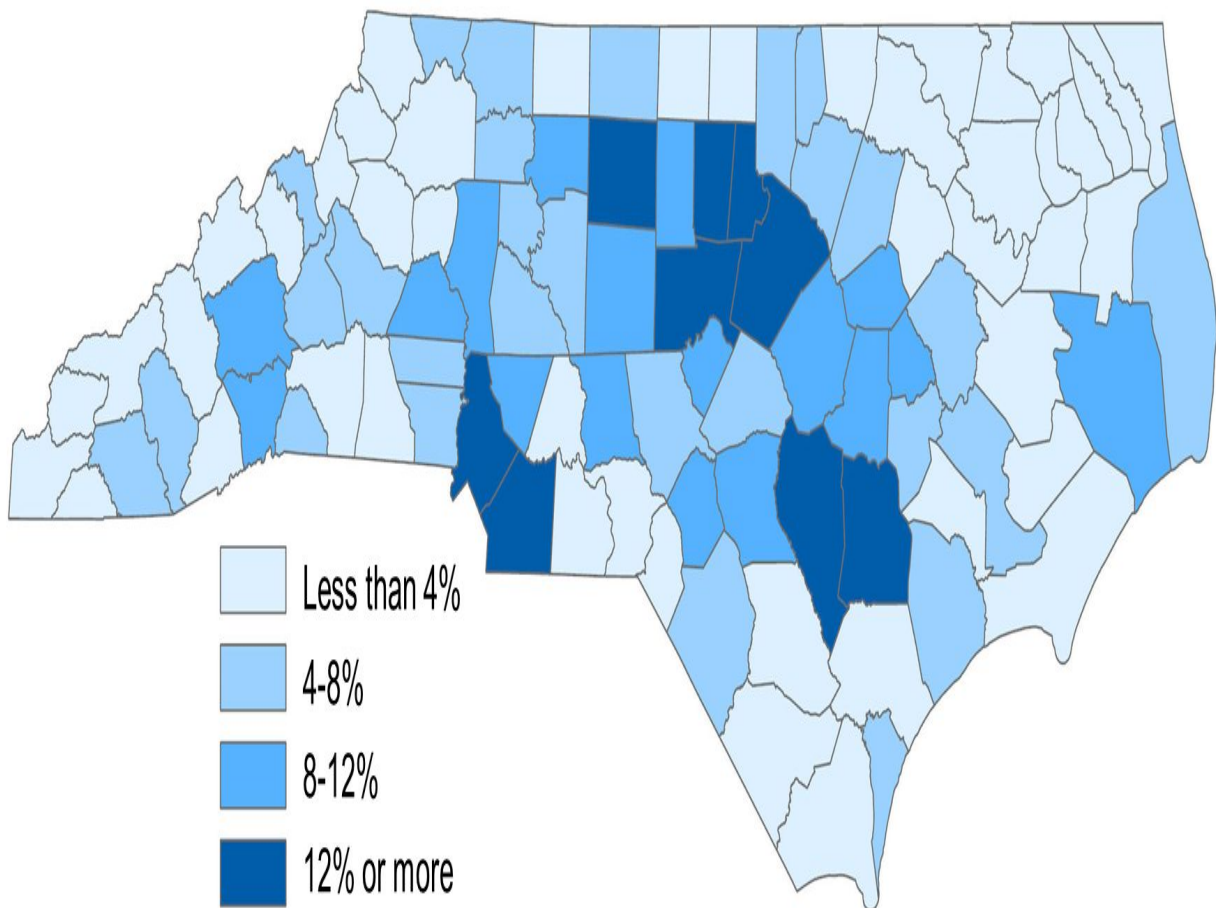


NC VOTERS	WHITE	BLACK	AM INDIAN	HISP	ASIAN	PAC ISLAND	MULT	OTHER	UND
	62.0%	19.1%	0.7%	3.9%	1.6%	0.0%	0.5%	3.7%	8.4%

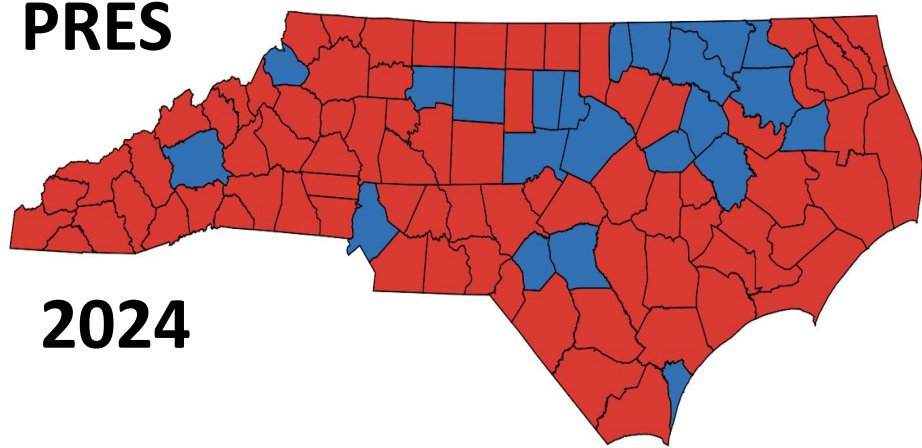
FOREIGN BORN PARENTS

COUNTRY OF

ORIGIN



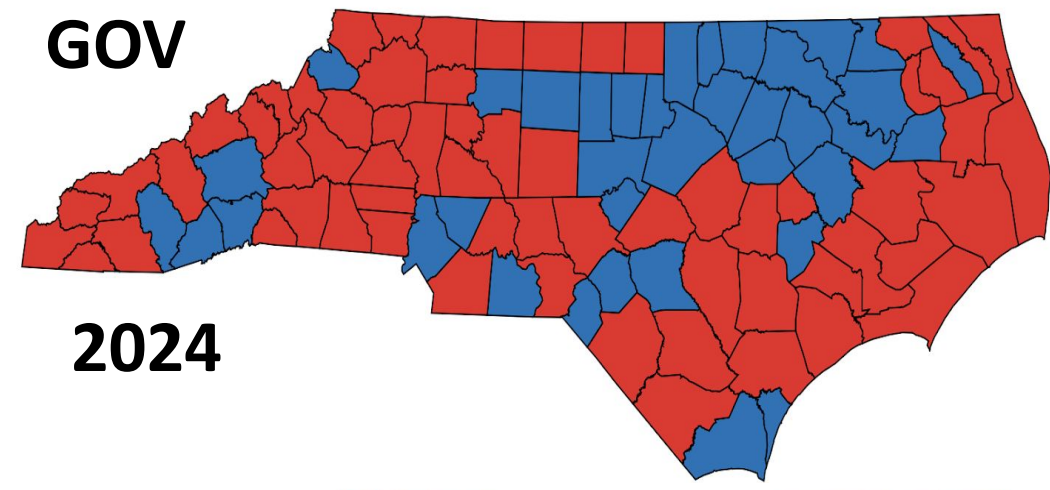
PRES



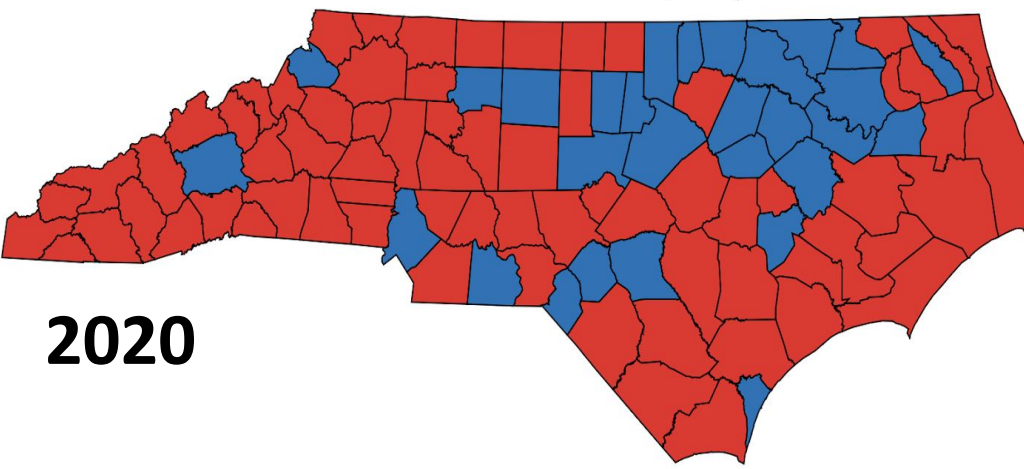
2024



GOV

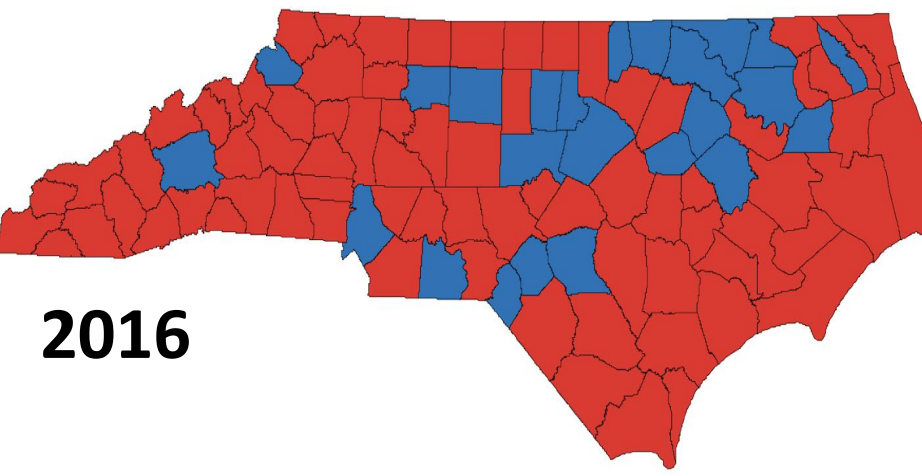
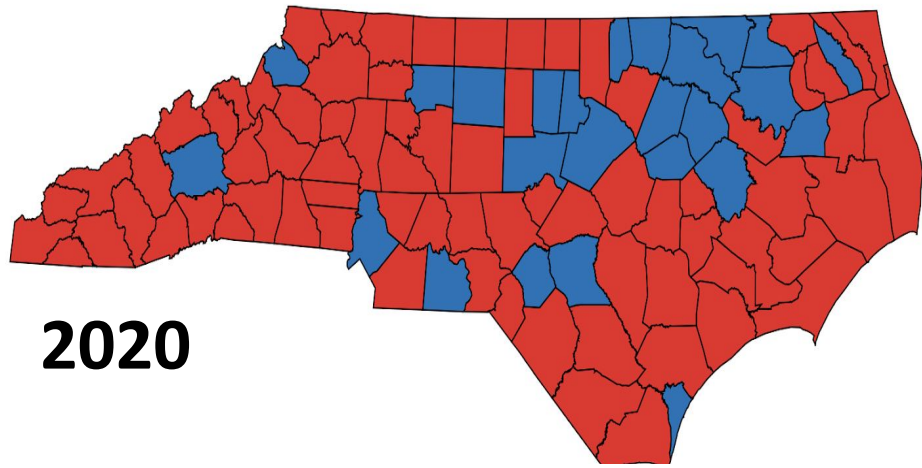


2024

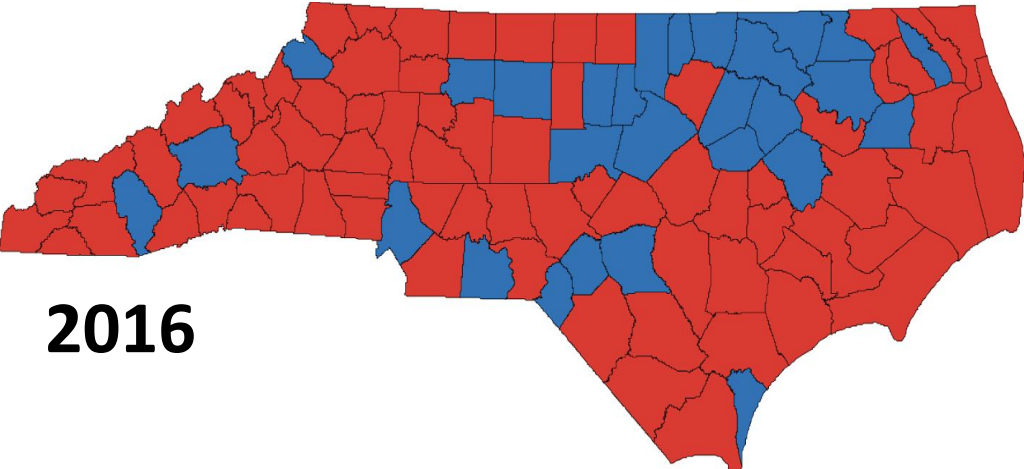


2020

2020



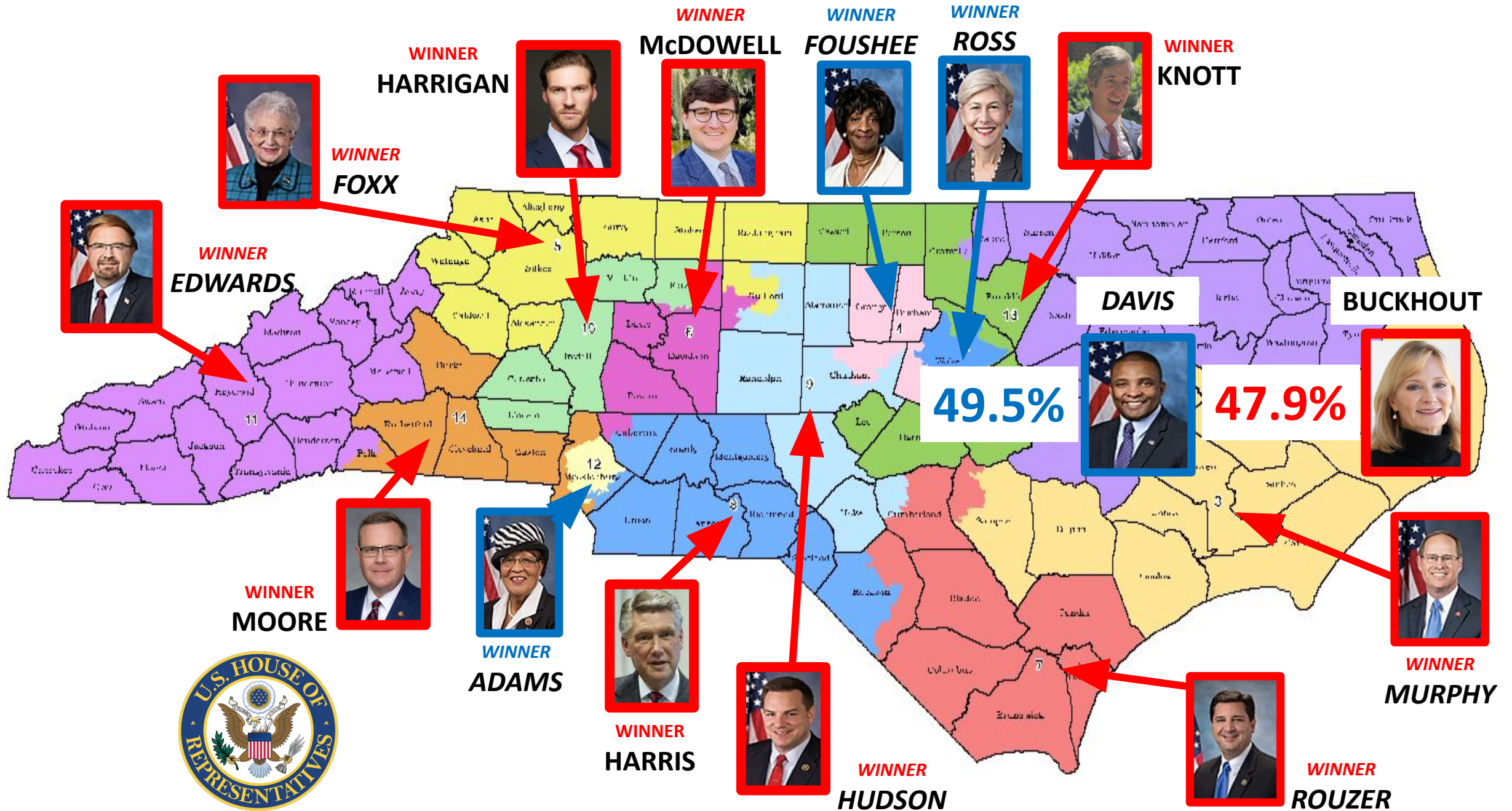
2016



2016

OFFICE	2000	2004	2008	2012	2016	2020	2024
US SEN		REP	DEM		REP	REP	
GOV	DEM	DEM	DEM	REP	DEM	DEM	DEM*
LT GOV	DEM	DEM	DEM	REP	REP	REP	DEM*
SEC OF STATE	DEM	DEM	DEM	DEM	DEM	DEM	DEM (I)
AUDITOR	DEM	REP	DEM	DEM	DEM	DEM	REP*
TREASURER	DEM	DEM	DEM	DEM	REP	REP	REP*
SUPERINTENDENT	DEM	DEM	DEM	DEM	REP	REP	DEM*
ATTY GEN	DEM	DEM	DEM	DEM	DEM	DEM	DEM*
AGRICULTURE	REP	REP	REP	REP	REP	REP	REP (I)
LABOR	REP	REP	REP	REP	REP	REP	REP*
INSURANCE	DEM	DEM	DEM	DEM	REP	REP	REP (I)

2024 CONGRESSIONAL RACES IN NORTH CAROLINA: 10 – 4





30 - 20



71 - 49



SAFE REP	LIKELY REP	LEAN REP	TOSS UP	LEAN DEM	LIKELY DEM	SAFE DEM
19	5	5 5R INC	5 2R INC	0	0	16 7D WIN
29			NEED 1 FOR SUPER MAJORITY			16
39 1 WINNER	13	17 2D/12R INC	3 2R INC	6 3D/3R INC	5 1D WIN	37 18D WIN
69			NEED 3 FOR SUPER MAJORITY			48

FOR 2024: very likely GOP has a majority in both the House and Senate of the NC General Assembly following the 2024 election, and a definite possibility GOP has a super majority in one or both chambers.



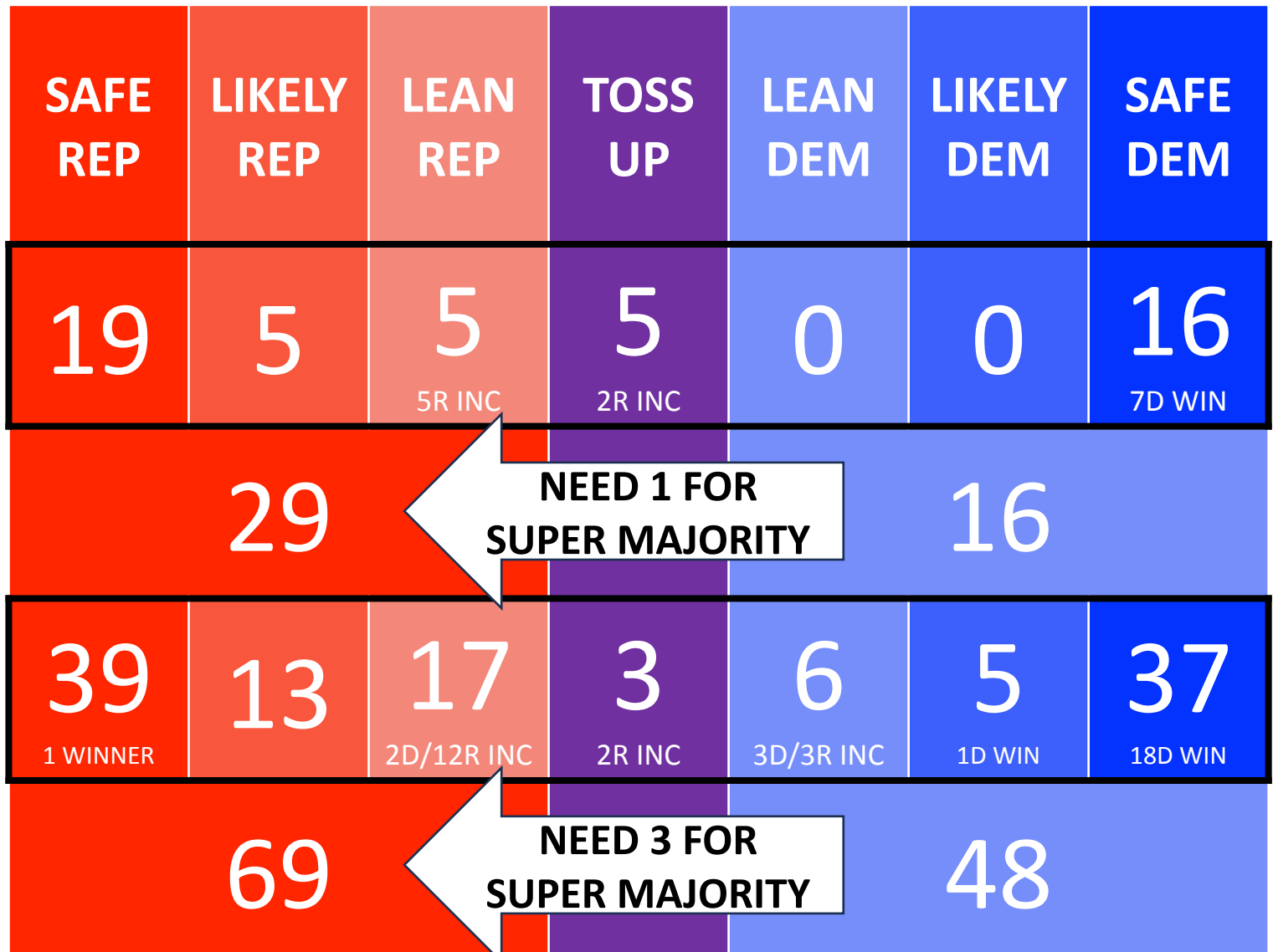
30 - 20



71 - 49



FOR 2025: GOP super majority in Senate and a 'practical' super majority in the House.



Willingham

Brockman



Cunningham

Pierce



Factors in the 2024 Elections

The Unusual

- ✓ Former president running again
- ✓ Presumptive nominee drops out before nominating convention
 - ✓ Oldest President v. First Women / South Asian

Who are the
'up-and-coming'
political figures in
US?

Factors in the 2024 Elections

The Unusual	<ul style="list-style-type: none">✓ Former president running again✓ Presumptive nominee drops out before nominating convention<ul style="list-style-type: none">✓ Oldest President v. First Women / South Asian	Who are the 'up-and-coming' political figures in US?
Voter Attitudes	<ul style="list-style-type: none">✓ DEMS/REPS willing to 'cross over' in low single digits✓ Record number of 'voting against the other person' voters✓ 2024: 73.0% 2020: 75.4% 2016: 69.0% 2012: 68.4%	Continued shift in traditional meaning of DEM & REP?

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Segment Shifts	<ul style="list-style-type: none">✓ Black men, Hispanic voters moved toward GOP✓ Educational attainment / urban v. rural continue as dividing lines✓ Will younger voters want to see more younger candidates?	What's impact of continued diversification of NC voter pop?

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<p>Battlegrounds</p>	<p>Total Trump margin in Arizona, Georgia, Nevada, North Carolina, Michigan, Pennsylvania, Wisconsin was 774,706</p>	<p>Reagan won 49 states in 1984.</p>

Looking Ahead



Can DEM Gov Stein & GOP led NC Gen Assembly get along?

First up: Cabinet Secretary confirmations.



2026
Will Thom Tillis face GOP primary?

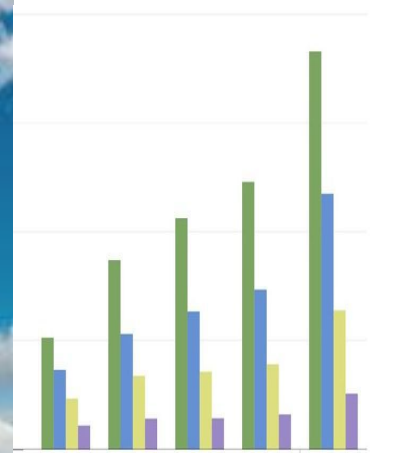
Will Wiley Nickel face DEM primary?



Midterm elections have historically been bad for the party in control of the White House.



BIG ISSUES: State budget structural imbalance, continued ideological stress within both parties, NC continues to grow and diversify.



Looking Ahead

Los Angeles Times

How the devastating Los Angeles fires could deepen California's home insurance crisis



Looking Ahead

ECONOMY

'A little heartburn': Jobs blowout stokes inflation concern with Trump poised to return

The government reported another blowout jobs number, but the danger for Trump will be if the economy falters even slightly from the sky-high hopes that investors have for his administration.



President-elect Donald Trump repeatedly claimed that prices — and interest rates — would come down if he were elected back to the White House. | Angelina Katsanis/POLITICO

North Korea learning from fighting with Russia against Ukraine, US warns

Diplomatic and military ties with Moscow making Pyongyang 'more capable of waging war', official says



📷 Russia has forged closer diplomatic and military ties with North Korea since Moscow invaded Ukraine in February 2022. Photograph: Vladimir Smirnov/AFP/Getty Images

North Korea is benefiting from its troops fighting alongside Russia against Ukraine, gaining experience that makes Pyongyang “more capable of waging war against its neighbours” a senior US official has warned.

Looking Ahead



Carnegie Endowment Report:

Disaster-Related Misinformation Isn't Unique to Helene and Milton

The conspiracy playbook focuses on undermining confidence in government and dividing Americans.



POLITICS, STATE GOVERNMENT

NCORR director booted as NCGA allocates \$50 million to mismanaged agency with mandatory audits



Wake County Commission Board Chair Matt Calabria resigns for Helene-related role in the Governor's office

Looking Ahead

