

North Carolina Senate: Two Key Shifts From 2020 To 2024

The surprise retirement announcement by Senator Thom Tillis has elevated North Carolina as a top Senate target. This week’s Discussion Points identifies two important election trends from 2020 and 2024 and what this might say about Republican chances for holding the seat. In 2020, North Carolina saw tight races at both the Senate (Tillis +1.75) and presidential levels (Trump +1.35). In 2024, President Trump carried the state by a slightly larger margin of +3.2, but from 2020 to 2024, there was a significant shift to the center in composition of the electorate.

	2020 NC (+1.35 Trump, +1.75 Tillis)	2022 NC Senate (+3.2 Budd)	2024 NC (+3.2 Trump)
Party ID	37% Republican	37% Republican	35% Independent
	34% Democrat	32% Democrat	34% Republican
	30% Independent	31% Independent	32% Democrat
Ideology	40% Conservative	41% Conservative	40% Moderate
	39% Moderate	37% Moderate	39% Conservative
	20% Liberal	21% Liberal	21% Liberal

Source: Edison Exit Polls

1.) Shift in party ID from 2020 to 2024

In the 2020 Senate race, exit polls show that Tillis lost independents by 3, but Tillis was helped by a Republican party ID advantage of +3 (37% R, 34% D, 30% independent) In 2022, Ted Budd won the Senate seat by +3.2. He lost independents by 6, but the Republican party ID advantage of +5 helped him overcome this deficit among independents.

In 2024, there was a dramatic difference in party ID from the two previous elections, with independents (35%) outnumbering Republicans (34%) and Democrats (32%). Independents were a much larger group in 2024 and President Trump won among independents by +4 as compared to 2020 in which he lost independents by 4. Similar to what we saw in other states and nationally in 2024, Democrats were a third party in North Carolina coming in after independents and Republicans.

In 2024, both Republicans and Democrats declined as percentages of the state electorate, with Republicans going from 37% in 2020 to 34% in 2024, and Democrats decreasing from 34% to 32%. Republicans still had a party ID advantage over Democrats of +2, but independents were the largest group. **Independents increased from 30% to 35% of the state’s electorate in that four-year timeframe. With the increase in independents, the Republican party ID advantage that was critical to Senate victories in 2020 and 2022 was not there in 2024.** This does not mean the party ID advantage won’t be there in 2026, but Republicans may not be able to count on this same advantage next time.

2.) Moderates overtake conservatives in 2024

In 2020, conservatives were the largest ideological group at 40% of the state’s electorate, with moderates a close second (39%). The Democratic Senate candidate Cal Cunningham carried moderates by 2:1 (63-31 Cunningham-Tillis). In 2022, the margin between conservatives (41%) and moderates (37%) was +4. Similar to 2020, moderates were a weak spot for Budd, losing this group 33-65. In the 2024 presidential race, moderates (40%) overtook conservatives (39%), with liberals at 21%. As with the increase in independents in party ID, 2024 marked a shift to the center ideologically.

For 2026, Republicans must have an effective strategy for independents in this state and in other competitive races. As we have seen in other Senate upsets like Georgia (2020), Nevada (2022) and Michigan (2022), trouble in the middle has cost Republicans too many Senate seats.

Have a good weekend.

David & Myra