CYGNAL

The South: An Increasingly Complex and Consequential Political Landscape

K-Means Clustering Analysis

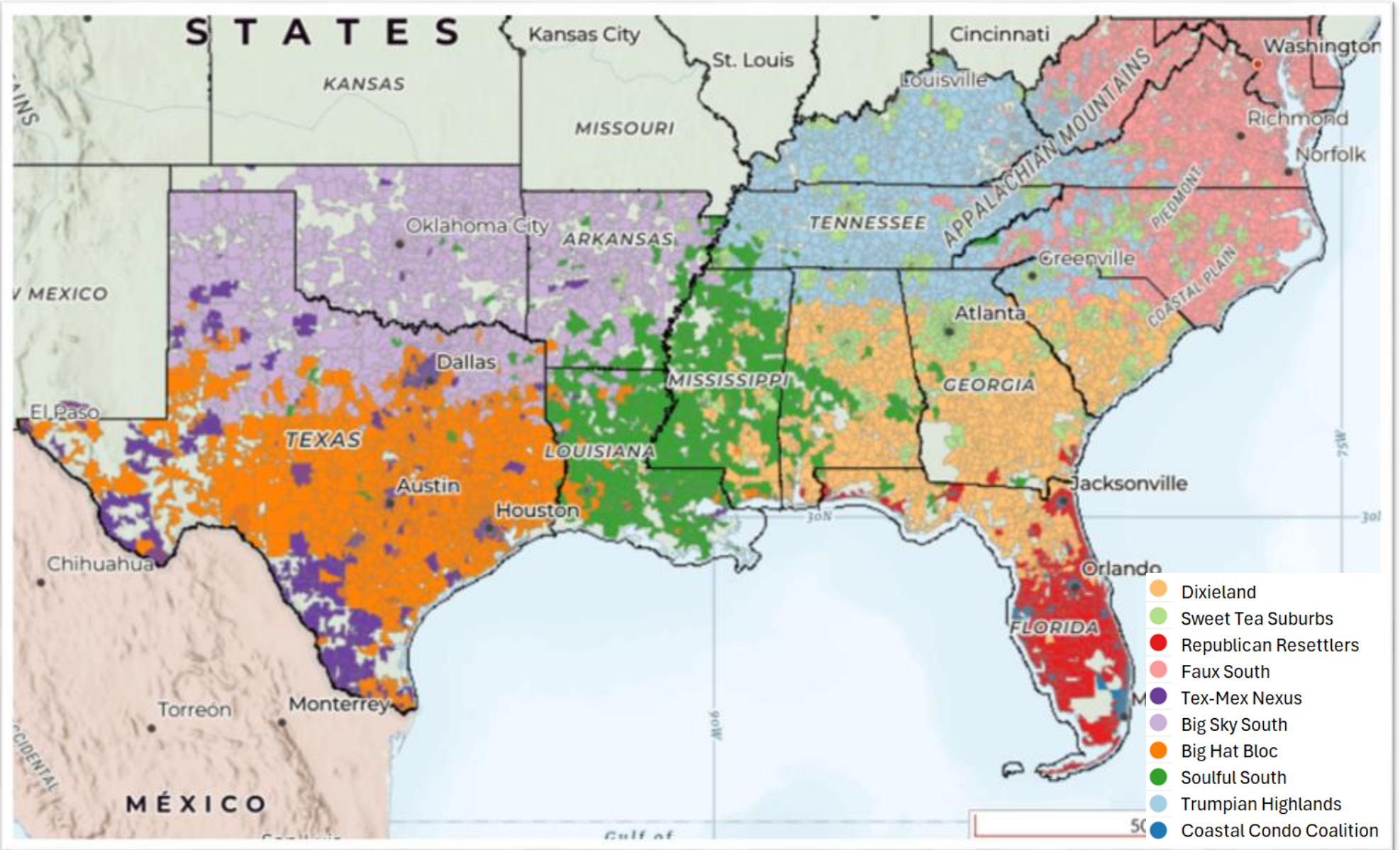**Census Region South**

Insights & Analysis

- Statewide lines don't dictate voting patterns, with both **North Florida and North Texas behaving congruently to Dixie and the Big Sky South**, respectively, versus the rest of their states. While the surrounding areas of Florida and Texas were late to the party in supporting Trump in 2016, their panhandles—aligned with Dixie and the Big Sky South—were not. Appalachia, the Big Sky South, Dixie, and the Republican Resettlers followed similar trends: gradual increases pre-2016, a huge margin in the 2016 Trump era, and peak or near-peak Republican performances in 2024.

- Largely stagnant and inelastic blocs, such as the wealthy sweet tea suburbs and the Faux South, suffered the most during the transition into 2020. These areas recovered somewhat by 2024 **but remained at or below the Republican ballot margin of 2008.**

- The two Texas groups had parallel trendlines unique to the South, falling from 2012 into 2016 and again into 2020 and conversely recovered much of what was lost into 2024.

- Lastly, the Soulful South and Florida's diverse and urban pockets experienced continual growth, starting in 2012 and 2016. Both regions largely trended Republican and did not experience the losses that other regions felt going into 2020.

- Texas, Florida, Georgia, and North Carolina each cover roughly three distinct regions within their state lines, while Alabama spans four. The takeaway here might be that messaging could be more impactful when tailored to regional biases rather than state biases.

- Moving away from a Trumpian candidate, do we retain these hyper-partisan strongholds? Do they exist after Trump? Consider Appalachia, where turnout in the western parts of North Carolina and Virginia shows the highest delta between parties. **Appalachia saw a 13% increase in Republican turnout and a 15% reduction in Democratic turnout—a delta of 28%.** If the next candidate fails to court this constituency, North Carolina becomes more competitive, and Virginia becomes further out of reach.

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Insights & Analysis

- Continuing with the narrative of the 2024 election, particularly in conjunction with this project, the notion of a shift in the partisan landscape of minority groups moving right reveals two interesting threads. In terms of Hispanics, Texas and Florida's diverse and urban regions shifted significantly, particularly from 2020 into 2024.

- However, an intriguing note emerges from the Soulful South. This region, with a **majority of individuals living there for over 15 years and the largest African-American population, has consistently shifted right since 2012**. It was one of the few regions that did not lose Republican ballot share leading into 2020. Once a 50-50 coin toss in 2012, the Soulful South now holds a 58-42 lead for Republicans. This group spans most of Louisiana and Mississippi but also extends through Alabama's Black Belt, a stretch of Democratic seats, as well as the Memphis area.

- The Soulful South trending rightward could be the canary in the coal mine for a realignment in minority group sentiments, with not just Louisiana and Mississippi falling into this category but also the Black Belt and parts of more urban southern cities. While this could be a byproduct of the core demographics that make up the group in Louisiana and Mississippi, it should not be discounted.

- Interestingly, ancestral roots, which were not included in the clustering analysis, played a role in separating some regions at a micro level. For example, the northeastern parts of Marion, Dillon, Fairfield, and Chester counties in South Carolina fall into the Faux South. These counties, with self-reported European ancestry primarily from England, diverge from much of the state, where Germanic or Irish origins dominate, causing them to align with a different region.

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Insights & Analysis

- The ebb and flow of these regions seem largely tied to the Trump Era, raising two major questions. First, do the areas that were uncommon bedfellows for Republicans prior to the Trump era—such as the Soulful South, the Progressive Peninsula, and high minority blocs that have trended right—represent a broader shift toward the Republican Party or simply toward Trump himself? Second, do the Sweet Tea suburbs (and, in a similar fashion, the Faux South), which act as a hard stop on much of the Trumpian enthusiasm, move more in line with pre-Trump era trends in these regions, or do they continue to deviate from the party?

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Legend:
- Dixieland
- Sweet Tea Suburbs
- Republican Resettlers
- Faux South
- Tex-Mex Nexus
- Big Sky South
- Big Hat Bloc
- Soulful South
- Trumpian Highlands
- Coastal Condo Coalition

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Full Map for Voter Participation Trends

- We opted for "Voter Participation Trends" over "turnout" to avoid the traditional notion of the percentage of registered voters participating versus yearly increases. Instead, the figures presented represent the increase in votes year over year by party, calculated as a function of (2012 Republican or Democrat voters – 2008 voters) divided by 2008 voters. This provides a proxy for turnout that is separate from partisanship.

Democratic Voter Participation

	8-12	12-16	16-20	20-24
Dixieland	-2%	-11%	17%	-5%
Sweet Tea Suburbs	-3%	2%	30%	-2%
Republican Resettlers	-3%	4%	23%	-8%
Faux South	0%	-2%	48%	-2%
Tex-Mex Nexus	-5%	22%	38%	-10%
Big Sky South	-11%	-4%	20%	-3%
Big Hat Bloc	-6%	14%	33%	-6%
Soulful South	0%	-15%	2%	-16%
Trumpian Highlands	-12%	-15%	21%	-6%
Coastal Condo Coalition	3%	11%	10%	-18%

Republican Voter Participation

	8-12	12-16	16-20	20-24
Dixieland	1%	8%	16%	7%
Sweet Tea Suburbs	2%	1%	16%	4%
Republican Resettlers	5%	12%	19%	8%
Faux South	4%	4%	27%	5%
Tex-Mex Nexus	0%	-1%	26%	9%
Big Sky South	-3%	7%	11%	3%
Big Hat Bloc	4%	4%	26%	9%
Soulful South	-4%	-1%	7%	-3%
Trumpian Highlands	3%	13%	17%	5%
Coastal Condo Coalition	-2%	5%	35%	8%

Delta(Δ)

	8-12	12-16	16-20	20-24
Dixieland	4%	19%	-1%	12%
Sweet Tea Suburbs	5%	-1%	-14%	6%
Republican Resettlers	8%	8%	-3%	16%
Faux South	5%	6%	-21%	7%
Tex-Mex Nexus	6%	-23%	-12%	18%
Big Sky South	8%	11%	-8%	5%
Big Hat Bloc	9%	-9%	-6%	15%
Soulful South	-4%	13%	4%	14%
Trumpian Highlands	15%	28%	-4%	11%
Coastal Condo Coalition	-5%	-6%	25%	25%

Net Turnout

	8-12	12-16	16-20	20-24
Dixieland	-1%	-3%	33%	2%
Sweet Tea Suburbs	-1%	3%	46%	2%
Republican Resettlers	1%	16%	42%	0%
Faux South	4%	2%	75%	2%
Tex-Mex Nexus	-5%	21%	65%	-1%
Big Sky South	-14%	2%	31%	0%
Big Hat Bloc	-2%	18%	59%	2%
Soulful South	-4%	-16%	9%	-19%
Trumpian Highlands	-9%	-2%	38%	-1%
Coastal Condo Coalition	2%	17%	44%	-10%

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Full Map for Partisanship

	2008	2012	2016	2020	2024
Dixieland	27%	29%	37%	37%	42%
Sweet Tea Suburbs	4%	6%	6%	0%	3%
Republican Resettlers	3%	6%	10%	9%	17%
Faux South	-9%	-7%	-4%	-11%	-8%
Tex-Mex Nexus	-3%	0%	-10%	-15%	-6%
Big Sky South	33%	37%	41%	38%	41%
Big Hat Bloc	20%	24%	20%	18%	25%
Soulful South	2%	0%	7%	9%	16%
Trumpian Highlands	28%	35%	47%	45%	50%
Coastal Condo Coalition	-21%	-23%	-26%	-16%	-3%

	2008-12	2012-16	2016-20	2020-24
Dixieland	1.6%	8.6%	-0.5%	5.2%
Sweet Tea Suburbs	2.4%	-0.5%	-5.5%	3.1%
Republican Resettlers	3.8%	3.9%	-1.4%	7.9%
Faux South	2.3%	3.2%	-7.8%	3.5%
Tex-Mex Nexus	2.9%	-10.5%	-4.4%	9.1%
Big Sky South	4.0%	4.7%	-3.0%	2.2%
Big Hat Bloc	4.5%	-4.1%	-2.4%	7.0%
Soulful South	-2.1%	7.3%	2.0%	7.6%
Trumpian Highlands	6.9%	11.9%	-1.5%	4.3%
Coastal Condo Coalition	-2.3%	-2.7%	9.9%	13.2%

Positive numbers indicate a net positive shift for Republicans, inversely for negative numbers attributed to Democrats. For the top chart, this is R or D +(figure).
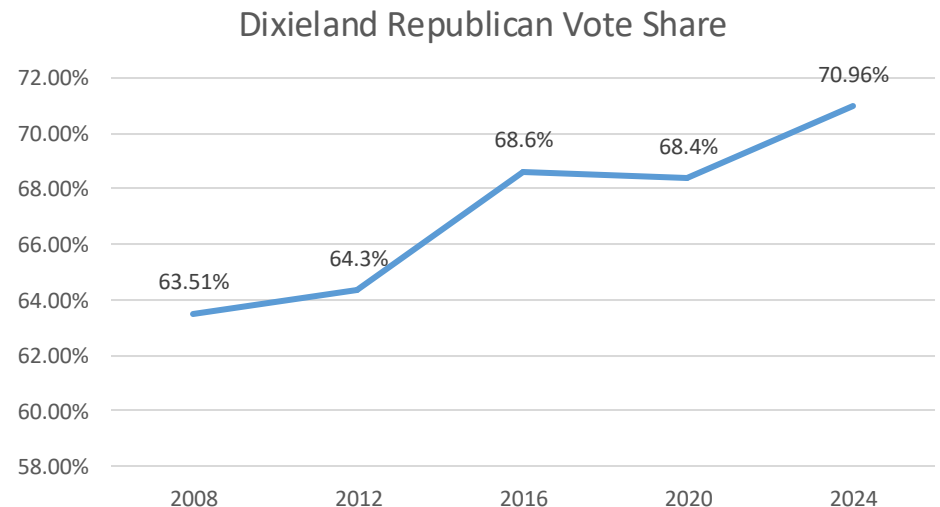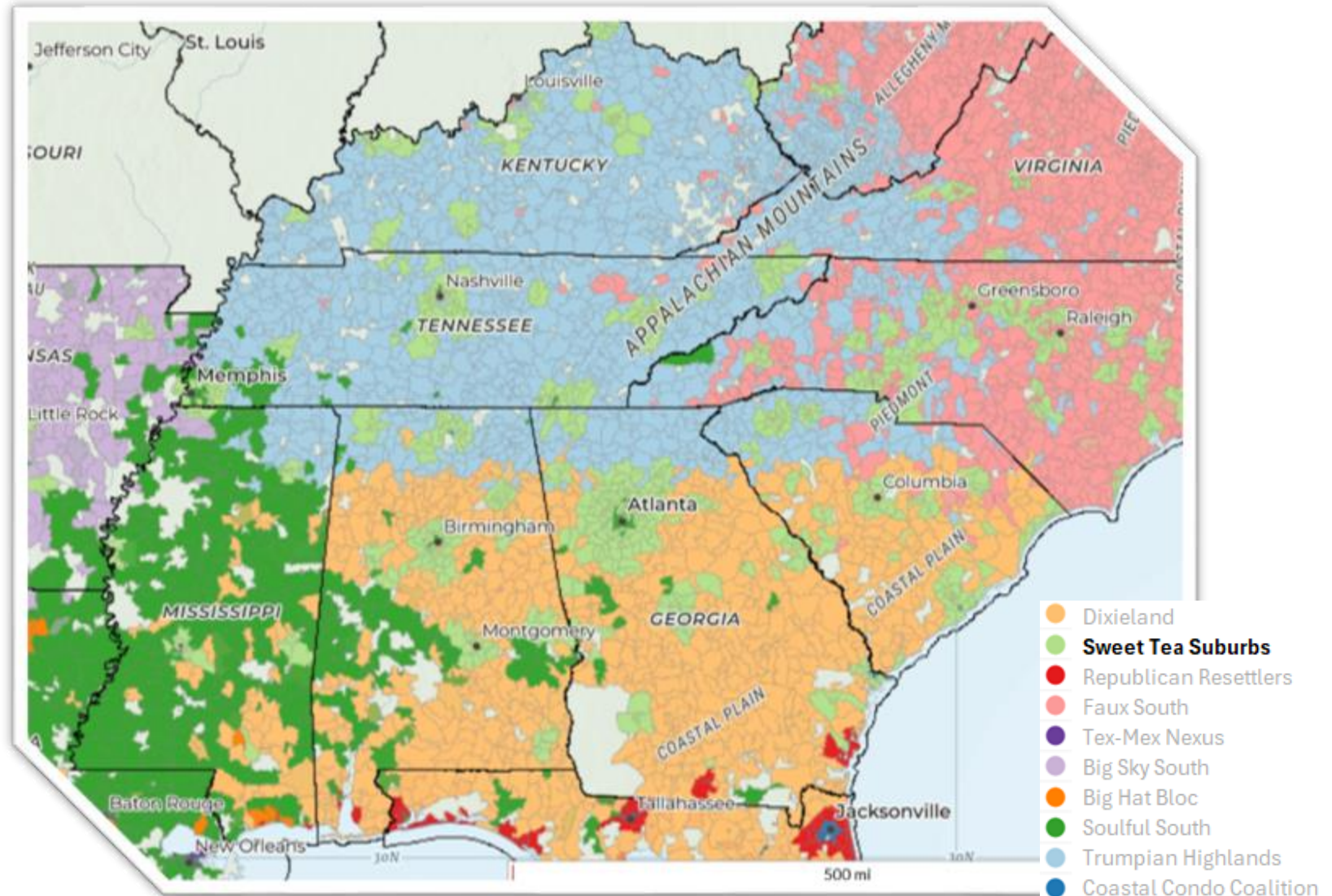
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Region 1: Dixieland

Legend:
- **Dixieland** (orange)
- Sweet Tea Suburbs (light green)
- Republican Resettlers (red)
- Faux South (pink)
- Tex-Mex Nexus (dark purple)
- Big Sky South (light purple)
- Big Hat Bloc (orange)
- Soulful South (green)
- Trumpian Highlands (light blue)
- Coastal Condo Coalition (dark blue)

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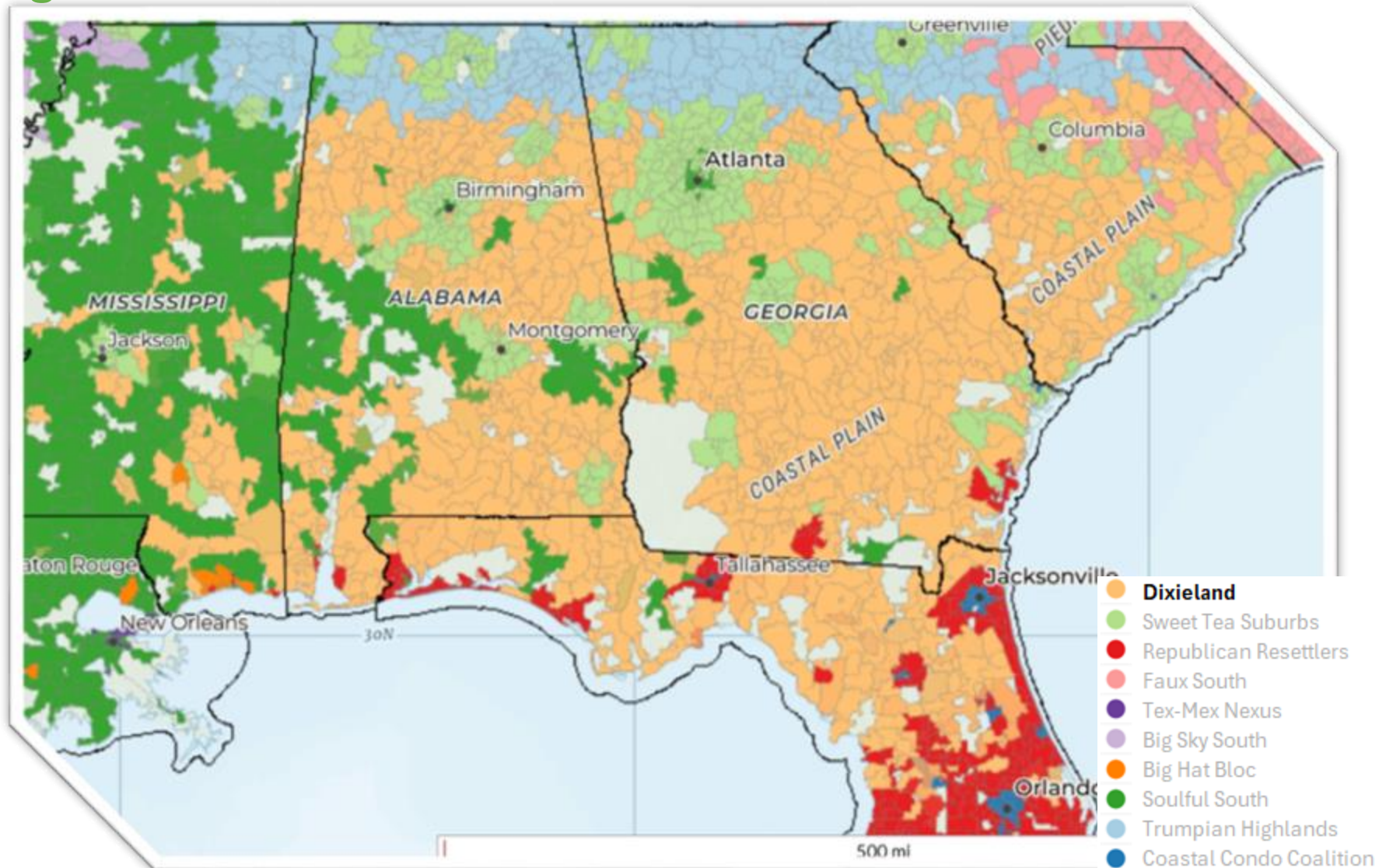
Region 1: Dixieland
Insights & Analysis

- Stretching across the heart of the historic "Deep South," Dixieland is a region deeply rooted in a shared cultural tradition that predates its modern political identity. Historically, this belt's agrarian roots fostered strong social hierarchies and communal networks, which today manifest in robust Republican support—outpacing other parts of the South by comfortable margins. Before 2016, Republicans won in areas like Georgia by an average of 29%, but during the Trump era, that margin rose to 39%. Notably, even with a minor dip in 2020, Dixieland recovered quickly in the 2024 cycle, shifting 3.7% back to the right from 2020 and increasing by 3.2% compared to 2016.

- While the two exclusively Floridian regions moved largely in rhythm with one another, the northern territory of Florida that falls into this region trends much more in line with the broader shifts seen in Dixieland, moving from R+35 in 2012 to R+45 in 2016. This group highlights the larger narrative that state lines are a poor proxy for underlying voter sentiments. It serves as a prime example of how these groups behave differently from their statewide trends.
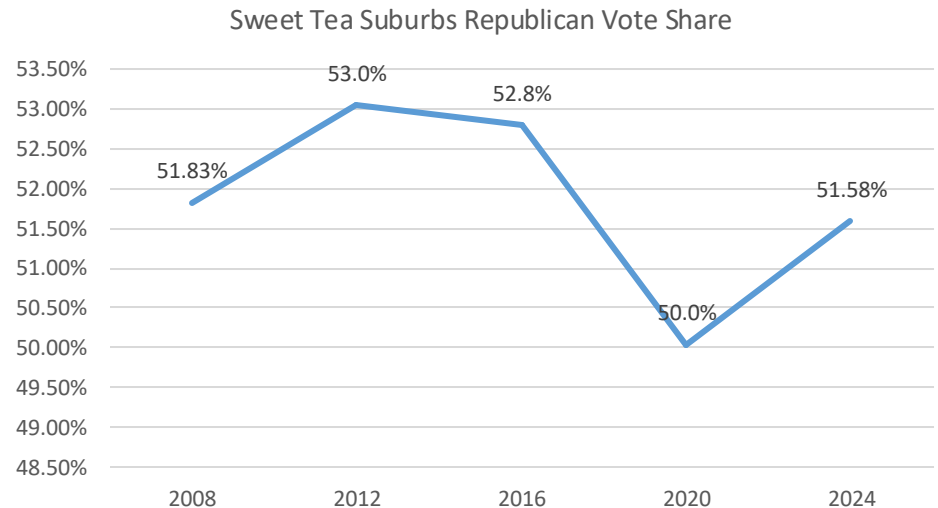
Dixieland Republican Vote Share

Year	Vote Share
2008	63.51%
2012	64.3%
2016	68.6%
2020	68.4%
2024	70.96%

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Region 2: Sweet Tea Suburbs

Legend:
- Dixieland
- **Sweet Tea Suburbs**
- Republican Resettlers
- Faux South
- Tex-Mex Nexus
- Big Sky South
- Big Hat Bloc
- Soulful South
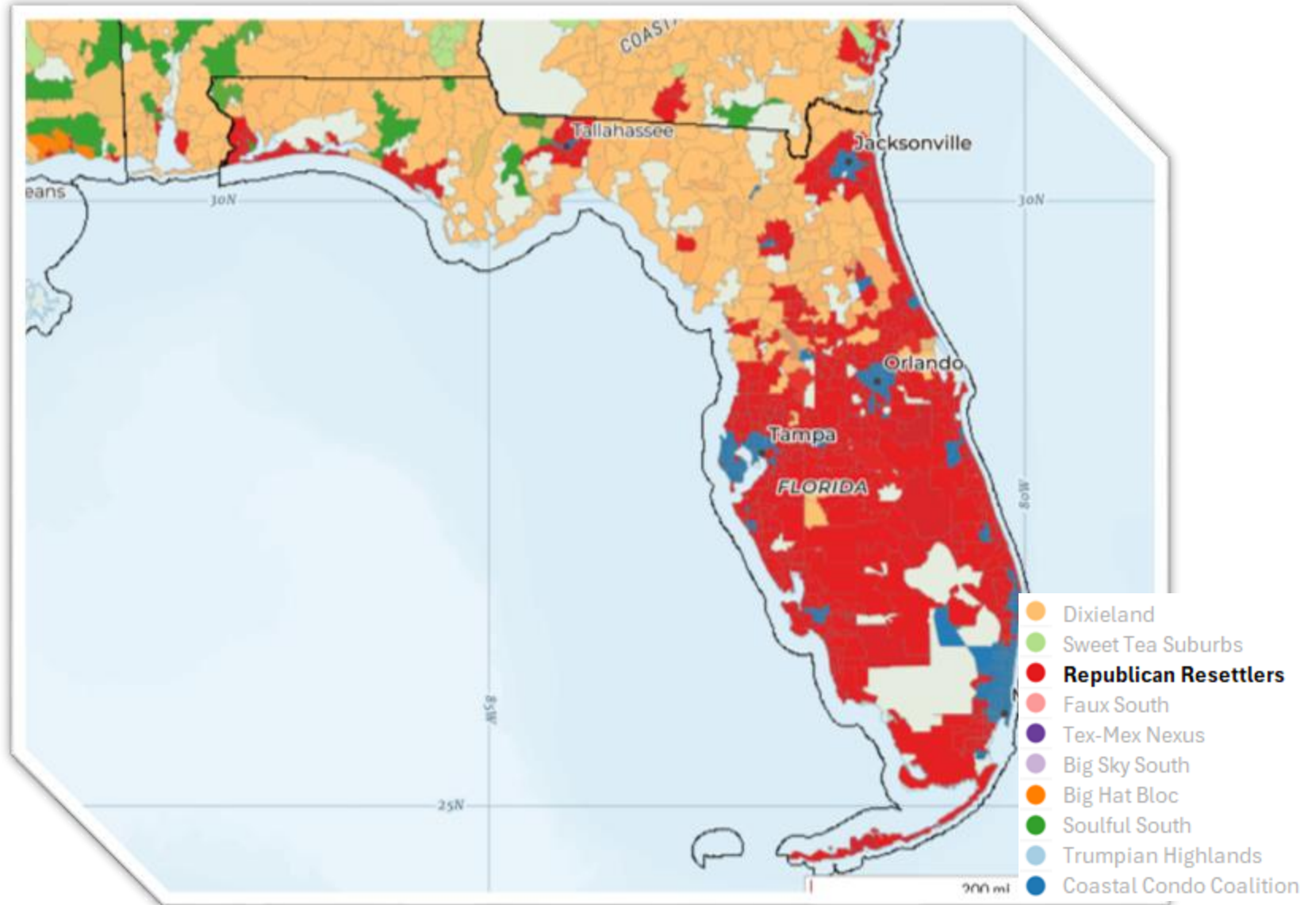- Trumpian Highlands
- Coastal Condo Coalition

Region 2: Sweet Tea Suburbs
Insights & Analysis

- While 2024 brought back Republicans lost in 2020, where the **margins in the region were a voting coin toss in 20**', the growth we saw into 2024 still did not reach John McCain's 2008 margins in these Sweet Tea Suburbs. Notwithstanding the Big Sky South, whose miniscule change from 2020 to 2024 was largely because of its natural Republican ceiling; at a Republican vote share in 24' at 70.28%, **the Sweet Tea Suburbs were the least in movement from 2020.**

- These suburban voters have the highest rate of intra-state permeability, with high rates of moving within state, demonstrating high levels of economic mobility.

- In contrast to the deep-red character of Dixieland, Georgia's Sweet Tea Suburbs in particular responded to Trump's candidacy in a nearly opposite fashion. Prior to 2016, Democrats here held a modest 3% advantage; but with the candidacy of Donald Trump, that margin surged to an average 12-point Democratic lead from 2016 onward. Specifically, in 2016 these suburbs shifted 6 points further left, and then another 7 points from 2016 to 2020, culminating in D+15 by the 2020 election.
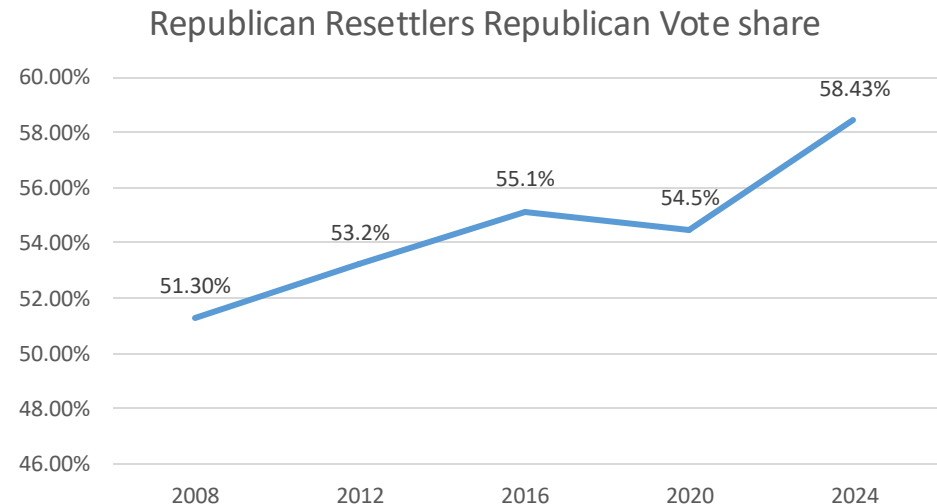
Sweet Tea Suburbs Republican Vote Share

Year	Value
2008	51.83%
2012	53.0%
2016	52.8%
2020	50.0%
2024	51.58%

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Region 3: Republican Resettlers

Legend:
- Dixieland
- Sweet Tea Suburbs
- **Republican Resettlers**
- Faux South
- Tex-Mex Nexus
- Big Sky South
- Big Hat Bloc
- Soulful South
- Trumpian Highlands
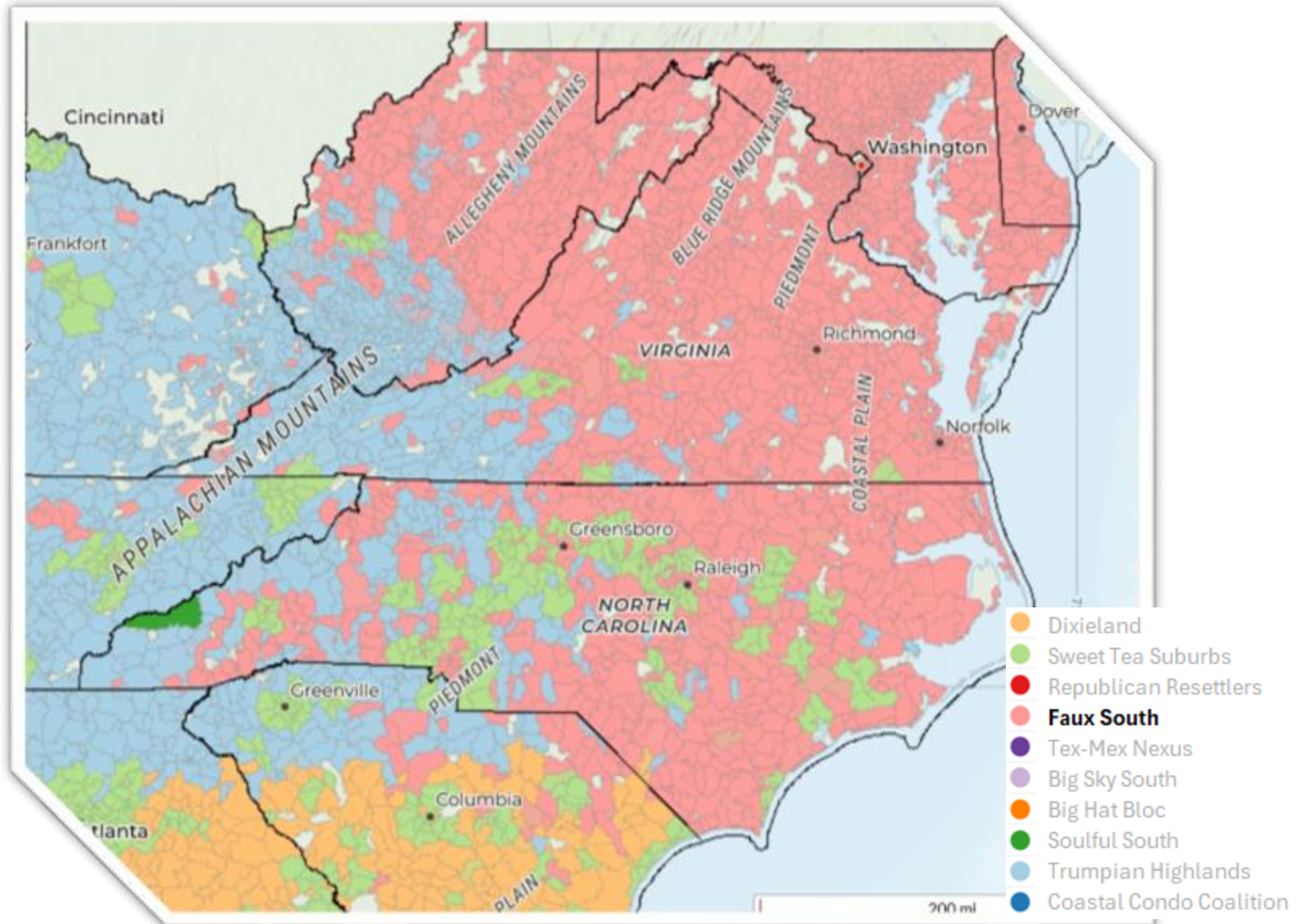- Coastal Condo Coalition

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Region 3: Republican Resettlers Insights & Analysis

- Florida's legacy as an evolving frontier—once a Spanish colony, then a magnet for retirees—shines through in the "Republican Resettlers." This region has largely had steady, year-over-year conservative shifts dating back to 2008. Even during the tumult of 2020, the overall pattern held: by **2024**, it swung 8 more points to the right, reaching **R+17**. Unlike Florida's more coastal or urban cores, this region has absorbed newcomers who tend to lean Republican, reflecting a politically "self-selecting" migration, with a key bloc of voters living in this region for less than seven years, much of this for a year or less.

- With the region consisting of the most transplants from other states, liberal leaning states in particular, (with 41% living in this region for less than seven years and 11% for a year or less), this could be a striking point between this group and the Dixieland elements of Florida, the latter being Floridian Republicans booming in light of Trump in 16, the former being a migration of Republican voters to the area.

Republican Resettlers Republican Vote share

Year	Value
2008	51.30%
2012	53.2%
2016	55.1%
2020	54.5%
2024	58.43%

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Region 4: The Faux South

Region 4: The Faux South
Insights & Analysis

- The Faux South encapsulates zones whose origins lie at the borderlands of the Mid-Atlantic, shaped by trade routes rather than plantation agriculture. Here, the local identity leans away from the archetypal "Southern" mores found in Dixie or Appalachia, producing a **left-leaning** orientation that saw significant volatility in the Trump years. Of the increase in turnout from either party from 2008 to 2024 in the South, the highest was in 2016 to 2020 in the Faux South, increasing 48% in Democratic turnout. In this same vein, 2016 to 2020 was the largest total turnout shift with a 27% increase in turnout from Republicans in addition to the prior stated Democratic turnout.

- Despite the overarching pessimism for Republicans in the region: a silver lining. In North Carolina, the most significant rightward shift between 2020 and 2024 occurred in the Faux South, which moved at twice the rate of its neighboring rural Appalachian and suburban "Sweet Tea" areas, despite all regions trending Republican in the state. While Appalachian-rooted areas became increasingly inelastic after surging under Trump, the state's overall trajectory shifted steadily from D+2 in 2008 to R+5 in 2024.
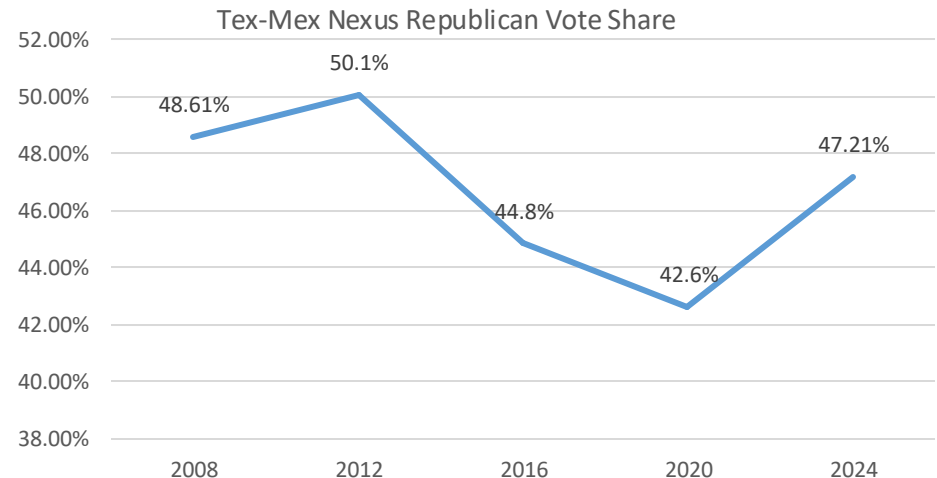
The Faux South Republican Vote share
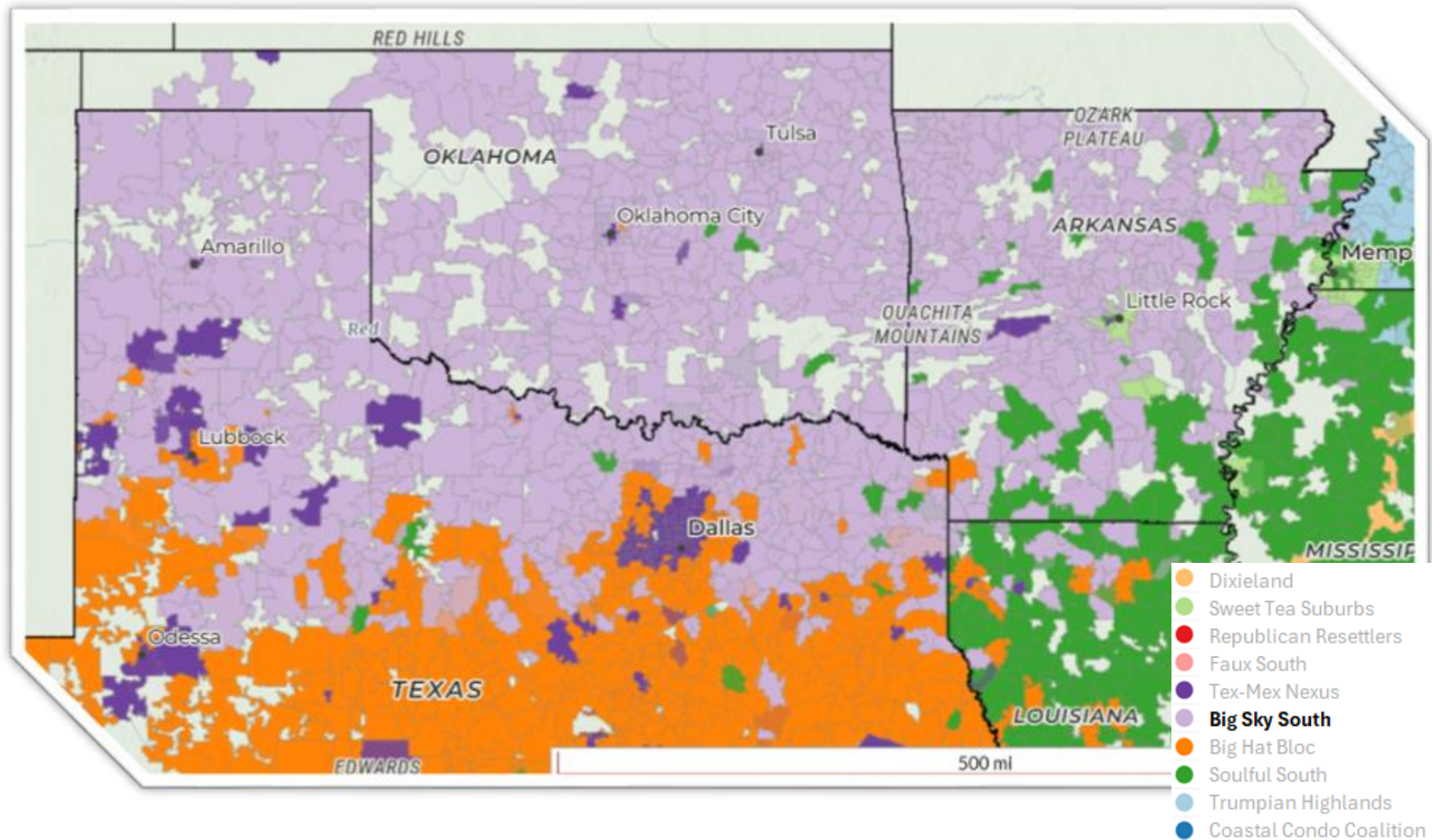

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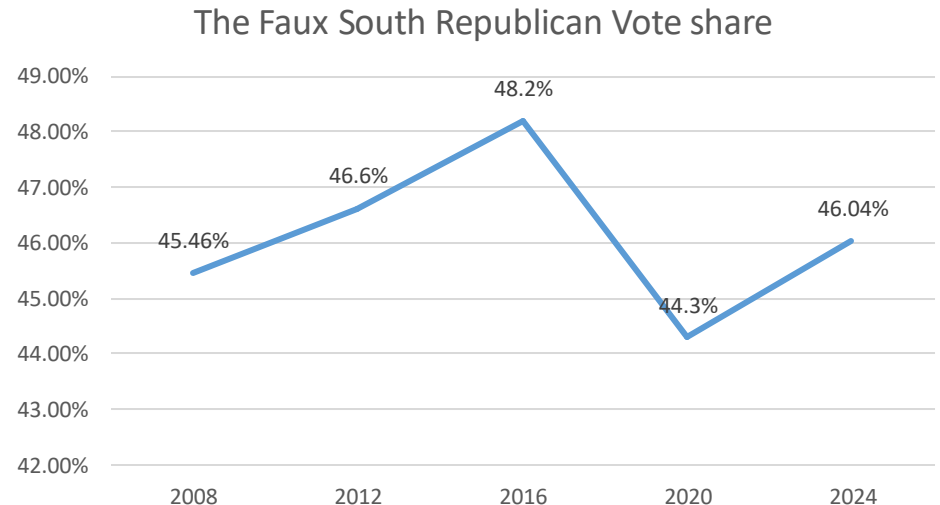
Region 5: Tex-Mex Nexus
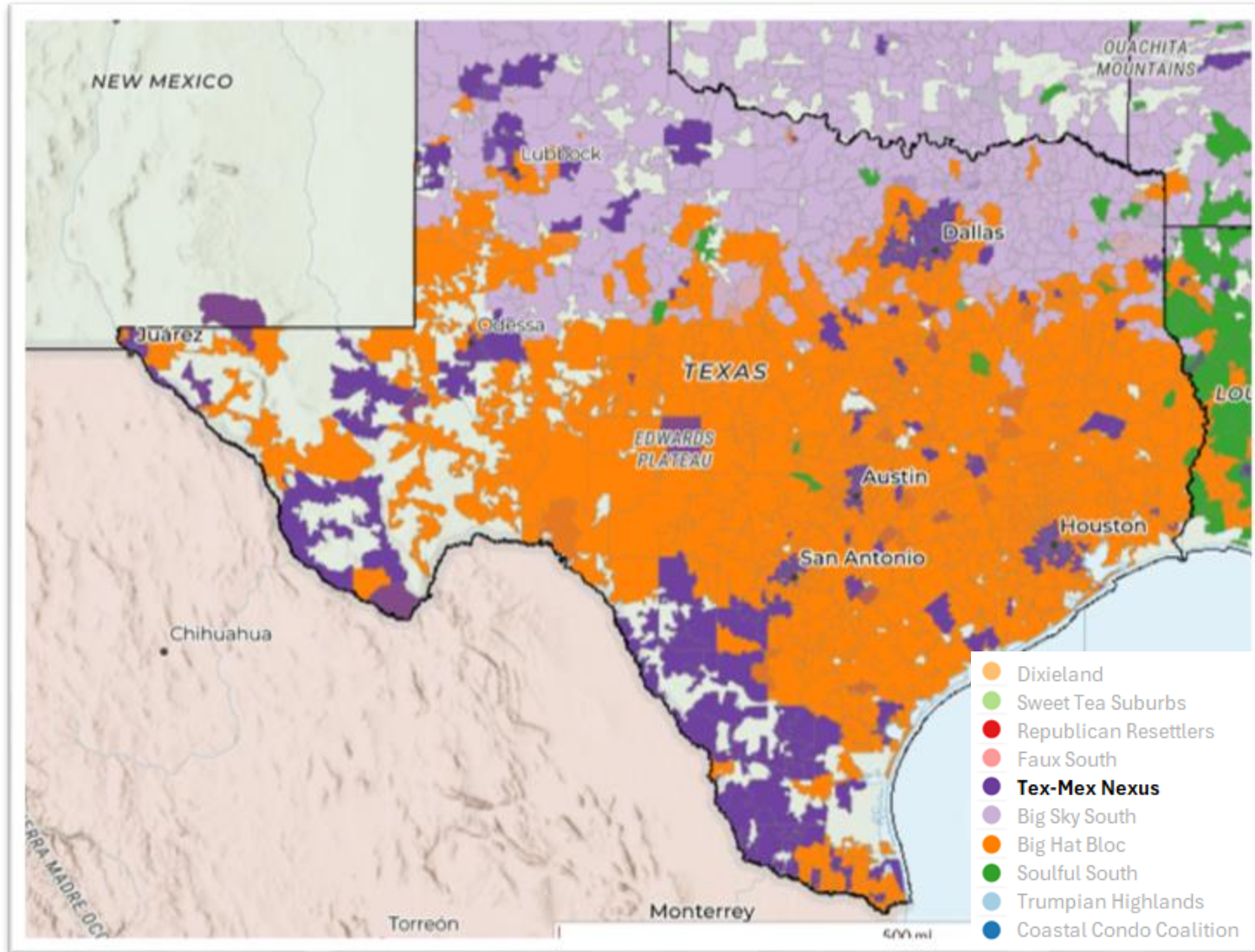
Region 5: Tex-Mex Nexus
Insights & Analysis

- This region had the largest hit in 2016 of all regions, moving 10 points to the left, and double the next highest shift leftward, with The Big Hat Bloc being the next in negative movement considering the Trump era.

- This region looked like a prime target for Democrats in a path for Texas, with Republicans losing significant hold from 2012-2016 where they previously held a 50-50 split in 2012, moving left 10 points. This trend continued into 2020, again dropping 4 points. However, despite this region holding the highest percentage of Democratic voters, with Democrats leading Republicans 53% to 39% in registration, Tex-Mex Nexus saw the second largest swing in the opposite direction in 2024, moving 9 points to the right ending at a D+5, and a five-point shift to the right from 2016.

- Broad brush, despite this shift to the right leading into 2024, their final margin was still points less Republican than 2008.
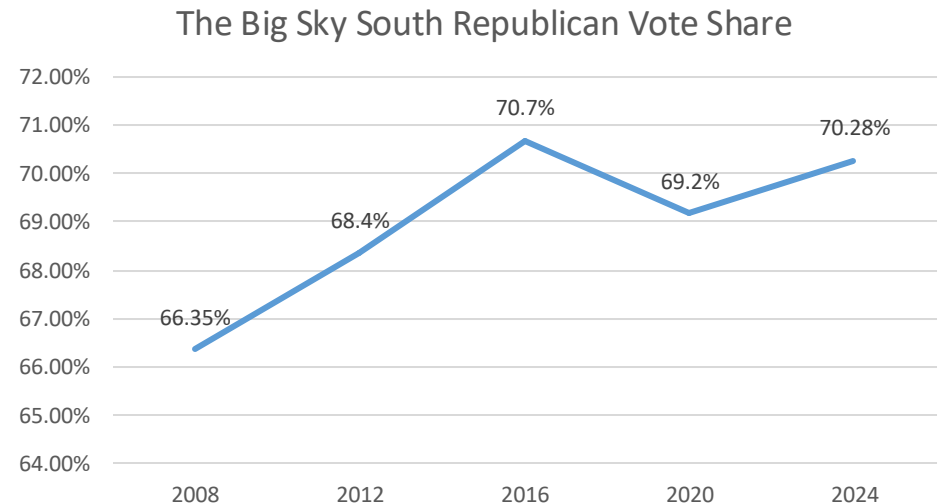
Tex-Mex Nexus Republican Vote Share

Year	Republican Vote Share
2008	48.61%
2012	50.1%
2016	44.8%
2020	42.6%
2024	47.21%

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Region 6: The Big Sky South

Legend:
- Dixieland
- Sweet Tea Suburbs
- Republican Resettlers
- Faux South
- Tex-Mex Nexus
- **Big Sky South**
- Big Hat Bloc
- Soulful South
- Trumpian Highlands
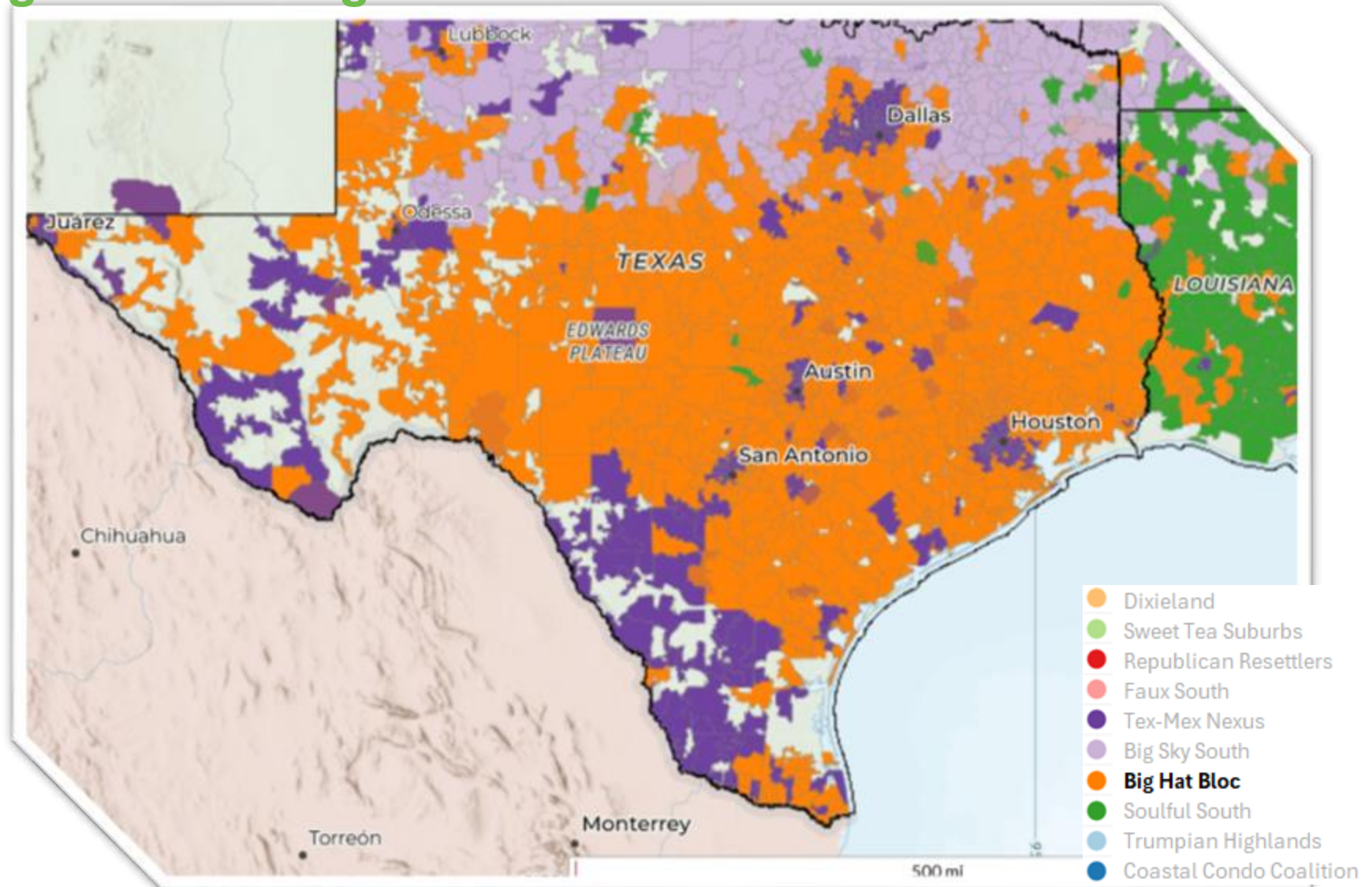- Coastal Condo Coalition

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Region 6: The Big Sky South
Insights & Analysis

- Tucked into northwestern Arkansas and northeastern Oklahoma—and spilling into parts of Texas—the Big Sky South are defined by rugged terrain and a heritage of small-scale farming. While Texas's statewide trends saw major metropolitan shifts, **Big Sky South regions** of Texas behaved instead like their neighbors in Oklahoma and Arkansas, swinging **5 points** to the right from 2012 to 2016. In 2024, the region experienced only a modest 3-point GOP recovery from its 2020 dip, indicating **relative stability** in a region already strongly Republican.

The Big Sky South Republican Vote Share

| Year	Vote Share
2008	66.35%
2012	68.4%
2016	70.7%
2020	69.2%
2024	70.28%

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Region 7: The Big Hat Bloc

Region 7: The Big Hat Bloc
Insights & Analysis

- Interestingly, the Big Hat Bloc saw more muted, but still pertinent trend to what happened in the more left leaning, urban and diverse Tex-Mex Nexus, where Republicans saw loses in ballot share from 2012 to 2016, 62%-60% and then again into 2020 to 59%. While the region didn't see the same huge shift as its more Democratic-leaning counterparts, it did pull back from much of its downward trend it experienced through the Trump years, with its highest ballot share for Republicans marked in 2024.

- If demographic trends shift again, The Big Hat Bloc may serve as an early indicator of suburban re-alignments across the broader South.
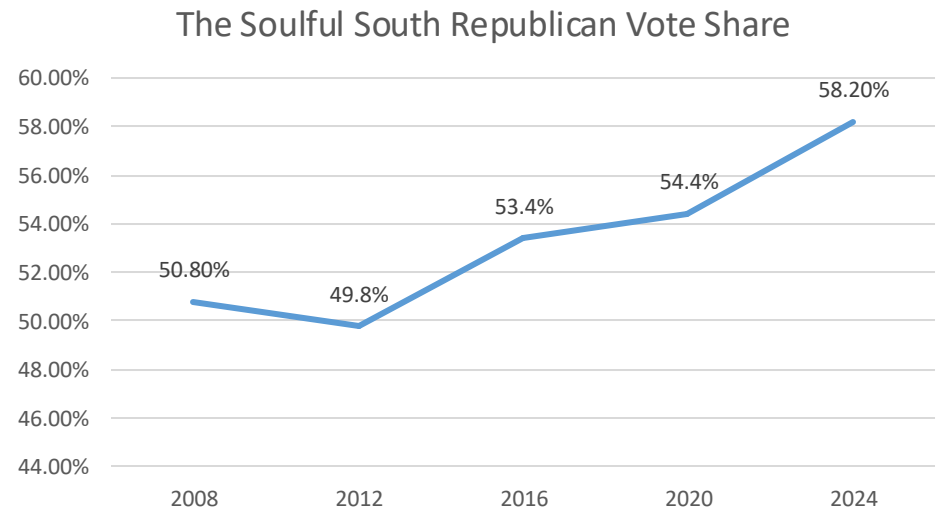
The Big Hat Bloc Republican Vote Share

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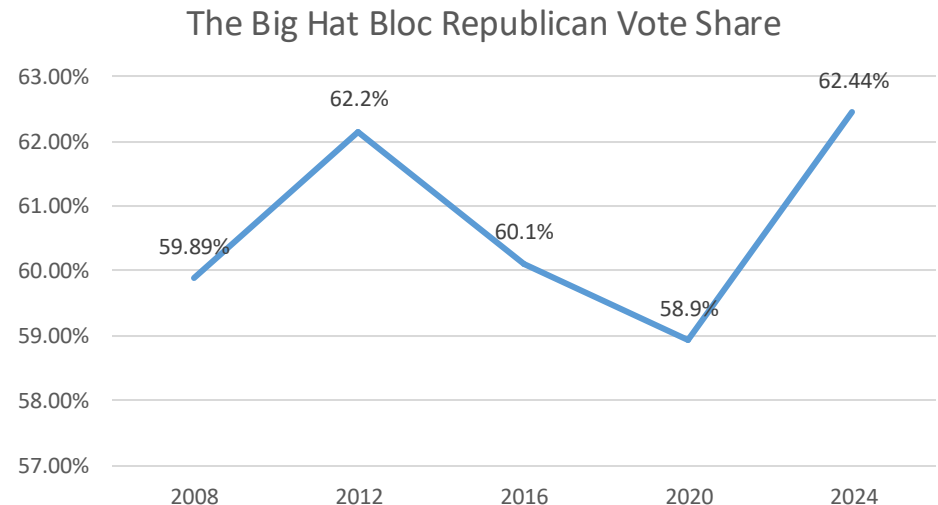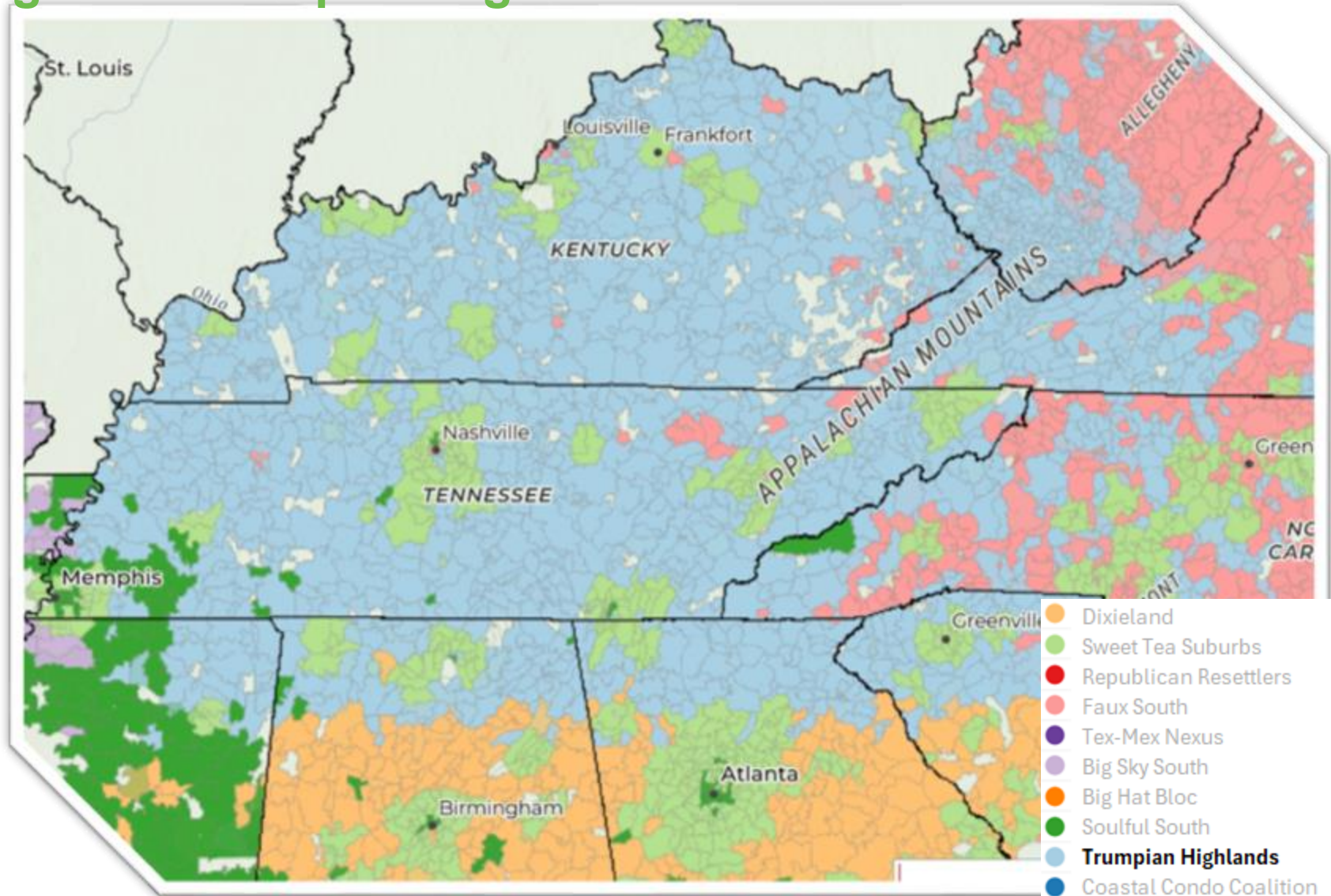
Region 8: The Soulful South
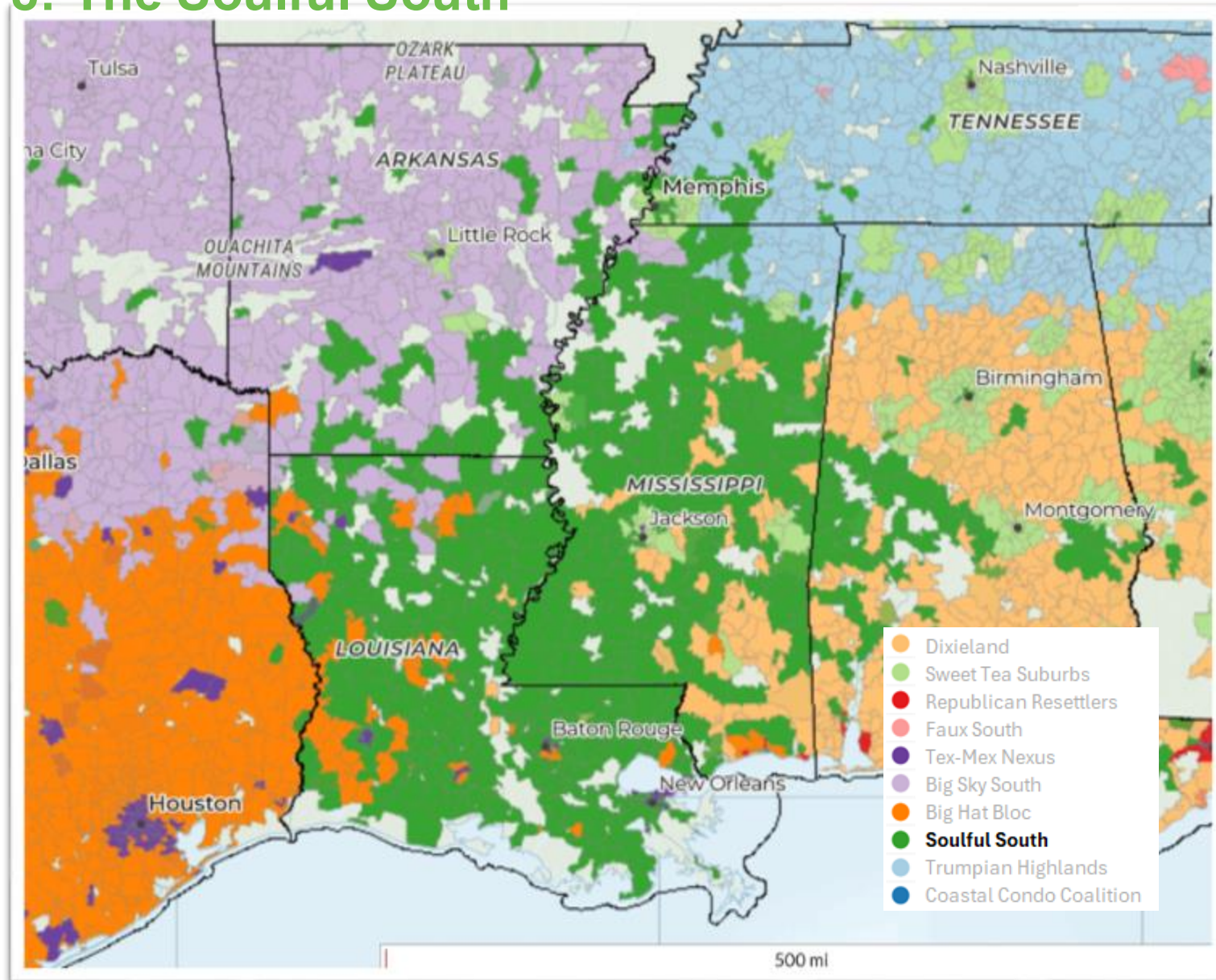
Region 8: The Soulful South Insights & Analysis

- Running along ancient river networks and coastal lowlands, The Soulful South combines predominantly rural parishes and counties once split nearly 50-50. In 2012, Republicans held a razor-thin edge; by **2024**, Republican vote share expanded to **58%**, never experiencing the 2016–2020 GOP dip seen elsewhere. Notably, **2024** brought a downturn in both Republican and Democratic turnout, but it hit Democratic voters far harder—continuing a broader trend that started back in 2012.

- This region has the highest percentage of African Americans; and was the only region that has grown year over year since 2012, showing a shifting demographic more than just a blip, with 2012 being nearly a coin toss, D+0.2, *consistently* moving to the right.

- Despite the myriads of fundamental demographic differences between the Republican Resettlers and The Soulful South, they performed identically on average in 2024 purely from a horserace perspective, at an R+8.
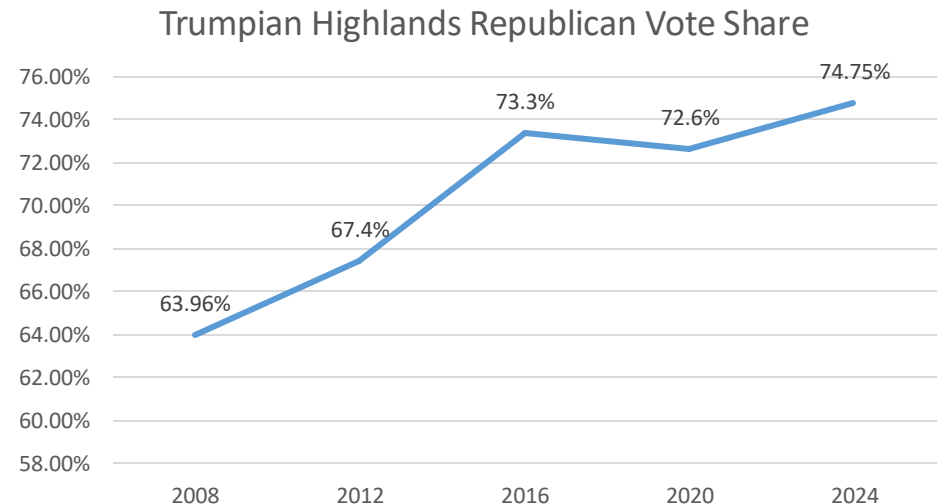
The Soulful South Republican Vote Share

Year	Vote Share
2008	50.80%
2012	49.8%
2016	53.4%
2020	54.4%
2024	58.20%

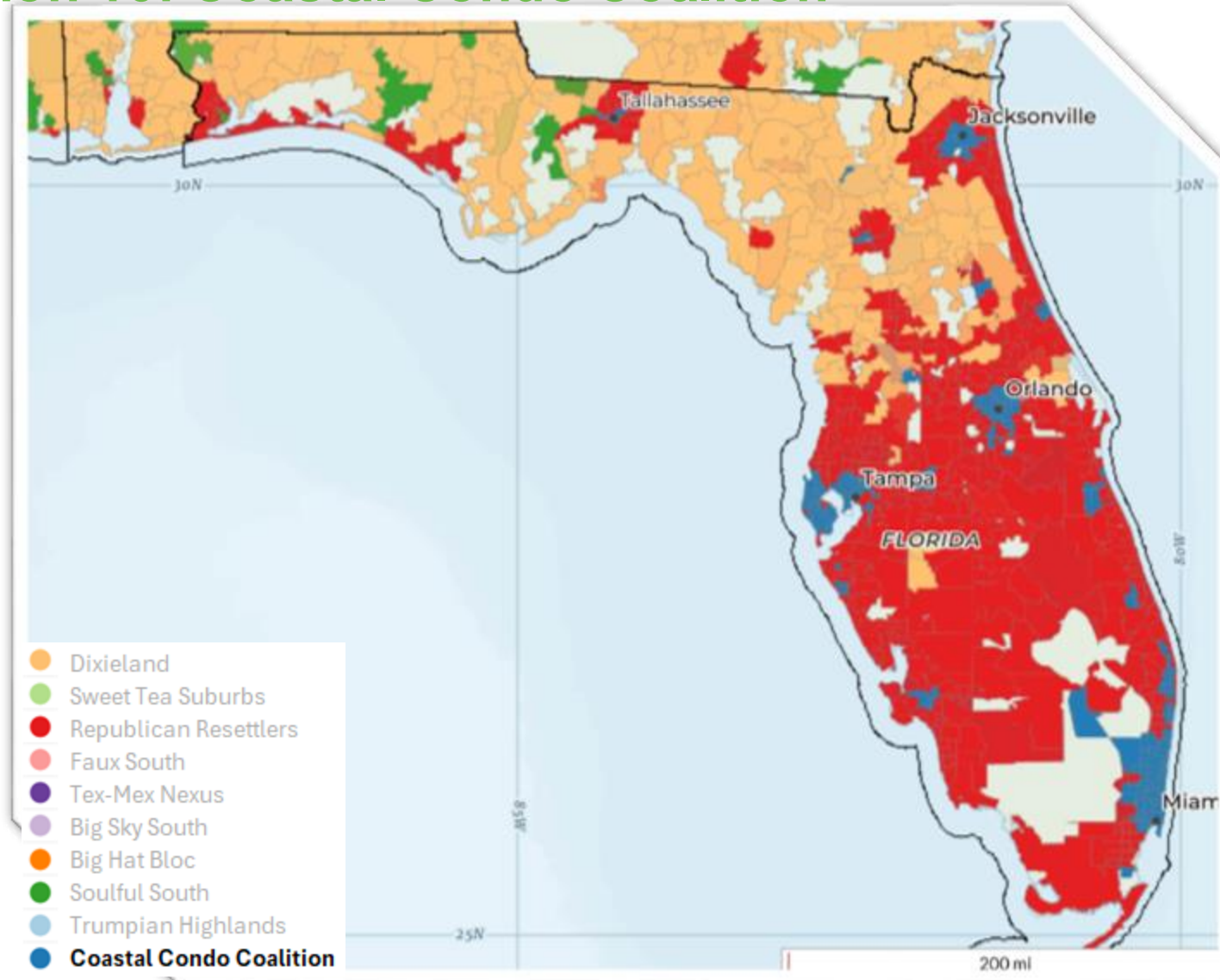CYGNAL

Region 9: Trumpian Highlands

Region 9: Trumpian Highlands Insights & Analysis

- Tracing the spine of the Appalachian chain, this region was solidly Republican before Donald Trump but jumped another **12 points** to the right in 2016, then 4 more points in 2024. With a **75%** Republican vote share, it's the GOP's strongest foothold in the modern South. While some might assume these rural mountains reached their partisan peak long ago, they defied expectations and pushed past perceived ceilings.

- Appalachia was also the highest delta between turnout between parties, with a 13% increase in Republican turnout and a 15% reduction in turnout by Democrats, a delta of 28%.

- The northern region of Georgia, with the beginnings of the Appalachian trail, moved 8% to the right from '08-'12 and another 6% from '12 to '16, one of the few regions that pushed past the ceiling of Republican performance, with a Republican Margin of 66% in Georgia in 16%, and 83% Republican vote share.

Trumpian Highlands Republican Vote Share

- 2008: 63.96%
- 2012: 67.4%
- 2016: 73.3%
- 2020: 72.6%
- 2024: 74.75%

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Region 10: Coastal Condo Coalition

Legend:
- Dixieland
- Sweet Tea Suburbs
- Republican Resettlers
- Faux South
- Tex-Mex Nexus
- Big Sky South
- Big Hat Bloc
- Soulful South
- Trumpian Highlands
- **Coastal Condo Coalition**

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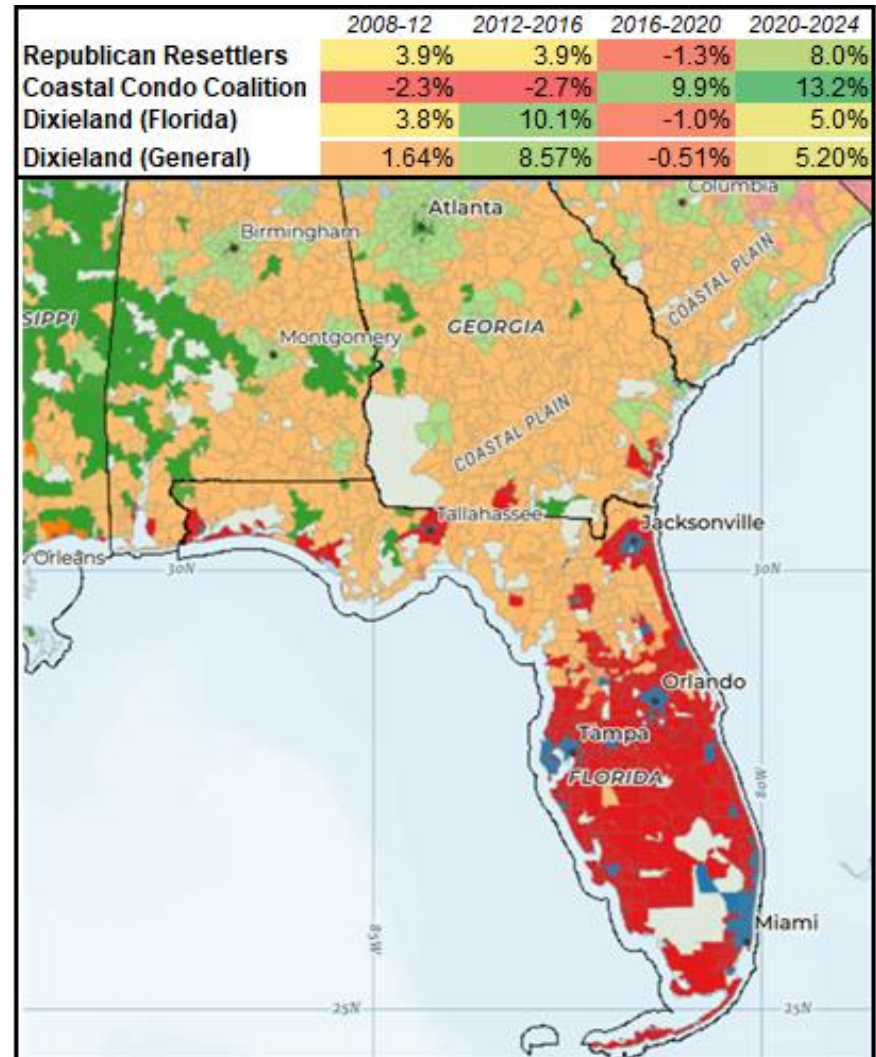# Region 10: Coastal Condo Coalition Insights & Analysis

- Florida's southern tip forms a highly urbanized and diverse "Peninsula." Democrat affiliations hold a lead here of about **45% to 32%**. Since 2016, Republican performance remained relatively low but began creeping up: 2024 witnessed a **6.6%** swing in the GOP's favor, surpassing prior modest gains.

- This is the only instance of 2016 being the worst year for Republicans, shifting to near contentious territory at 49-51 R-D. What was a key driver? This region has the highest rate of non-residential living, with more than a quarter of voters living in apartments, group living or condominiums. In conjunction, despite the median household income being 81.4k, with some of the highest cost of living in the South, with almost 10% of home ownership in homes values at over a million dollars (according to our voter data information).

- Turnout has shown dramatic swings. In the leadup to 2020, Republican turnout soared by **35%**, while Democrats rose by just 10%. Then from 2020 to 2024, Republicans added another 8%, as Democratic turnout slumped by 18%. If that lopsided net effect persists, the Peninsula could inch from reliably blue to outright competitive.

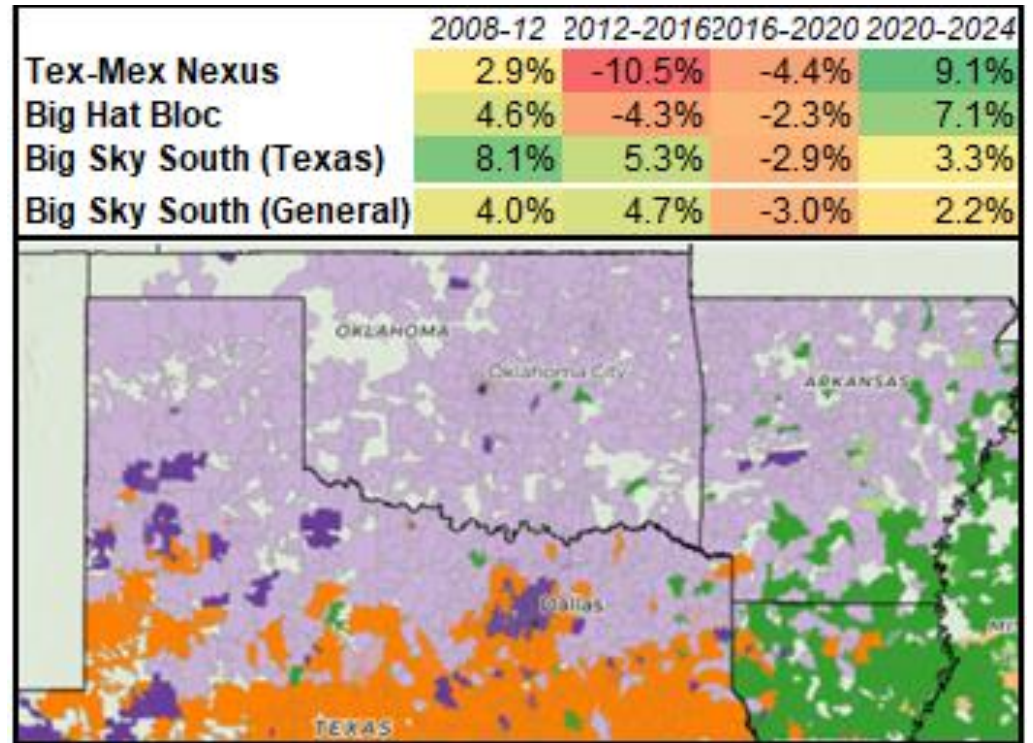Diverse Urban Florida Republican Vote Share

CYGNAL
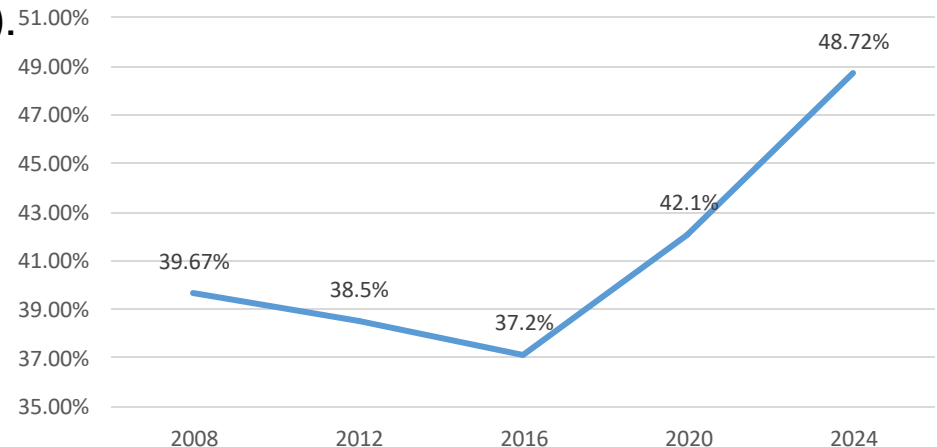
Florida's Dixie

- Where the two exclusively Floridian regions moved largely in rhythm with one another, the northern territory of Florida that fall into this region trends much more in line with the larger shifts seen in Dixieland, moving from R+35 in 2012 to R+45 in 2016. This group speaks to the larger narrative of state lines being a poor proxy for underlying voter sentiments.

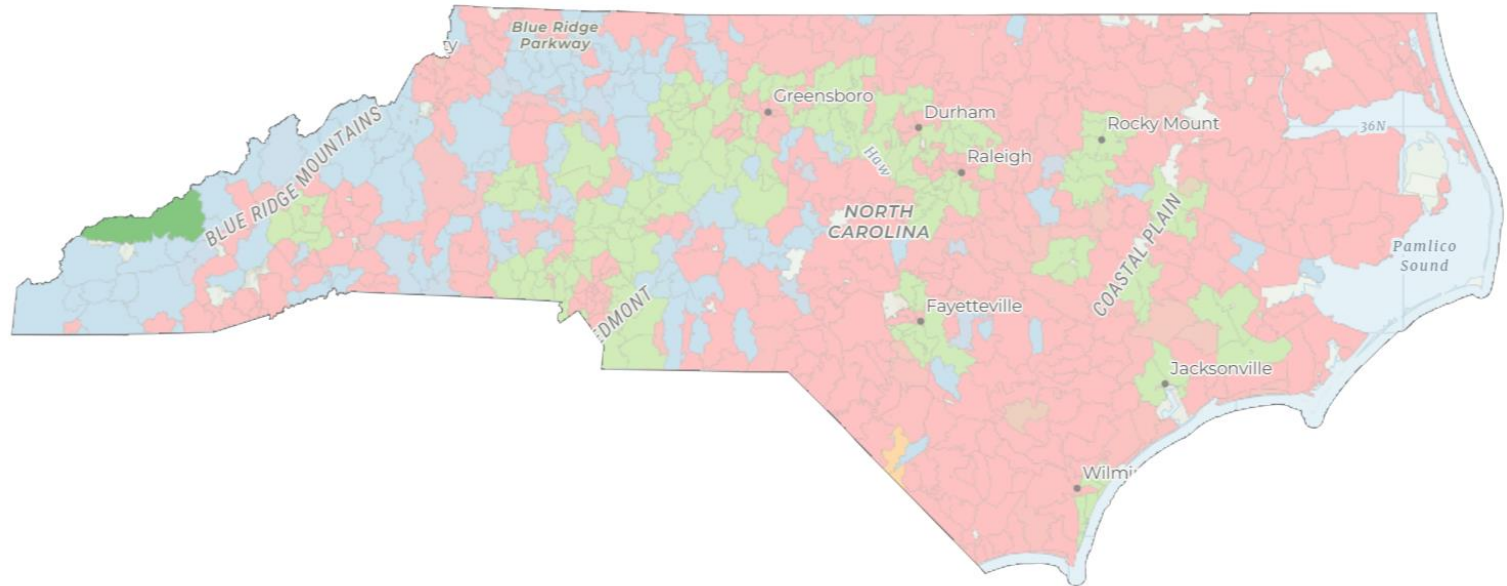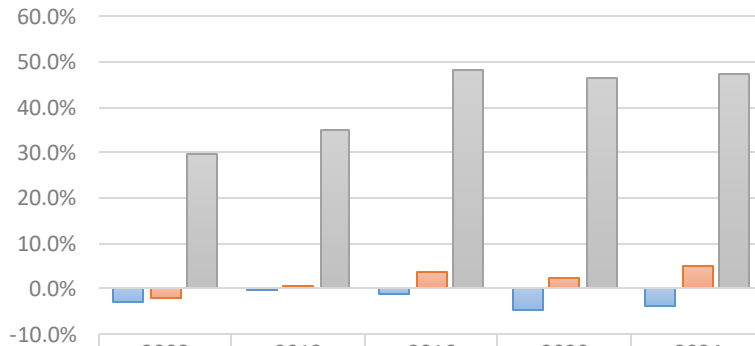|	2008-12	2012-2016	2016-2020	2020-2024
Republican Resettlers	3.9%	3.9%	-1.3%	8.0%
Coastal Condo Coalition	-2.3%	-2.7%	9.9%	13.2%
Dixieland (Florida)	3.8%	10.1%	-1.0%	5.0%
Dixieland (General)	1.64%	8.57%	-0.51%	5.20%

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Big Sky South of Texas

While Texas's statewide trends saw major metropolitan shifts, Big Sky South regions of Texas behaved instead like their neighbors in Oklahoma and Arkansas, swinging 5 points to the right from 2012 to 2016. In 2024, the region experienced only a modest 3-point GOP recovery from its 2020 dip, indicating relative stability in a region already strongly Republican.

	2008-12	2012-2016	2016-2020	2020-2024
Tex-Mex Nexus	2.9%	-10.5%	-4.4%	9.1%
Big Hat Bloc	4.6%	-4.3%	-2.3%	7.1%
Big Sky South (Texas)	8.1%	5.3%	-2.9%	3.3%
Big Sky South (General)	4.0%	4.7%	-3.0%	2.2%

CYGNAL

Regions of North Carolina

North Carolina Margin

	2008	2012	2016	2020	2024
Sweet Tea Suburbs	-2.8%	-0.5%	-1.4%	-4.8%	-3.6%
Faux South	-1.91%	0.40%	3.57%	2.36%	5.09%
Trumpian Highlands	29.68%	35.18%	48.09%	46.33%	47.40%

North Carolina year to year change
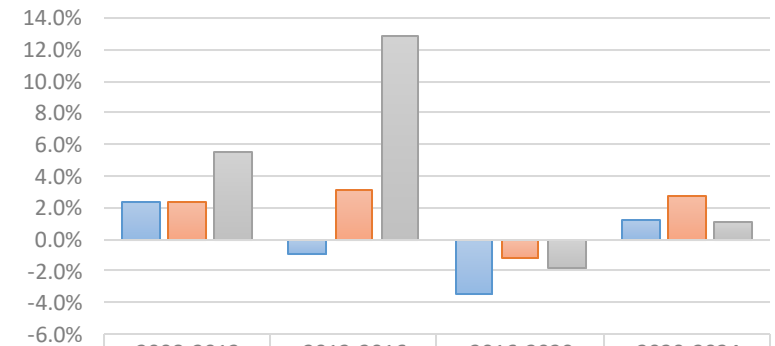
	2008-2012	2012-2016	2016-2020	2020-2024
Sweet Tea Suburbs	2.3%	-0.9%	-3.5%	1.2%
Faux South	2.3%	3.2%	-1.2%	2.7%
Trumpian Highlands	5.5%	12.9%	-1.8%	1.1%

CYGNAL

Regions of Georgia

	2008	2012	2016	2020	2024
Dixieland	28.3%	30.3%	38.2%	37.7%	41.4%
Sweet Tea Suburbs	-4.1%	-1.7%	-7.8%	-14.7%	-13.2%
Republican Resettlers	15.9%	17.9%	23.3%	17.5%	21.9%
Soulful South	-20.1%	-21.9%	-10.0%	-9.5%	-5.7%
Trumpian Highlands	51.9%	59.9%	65.8%	62.7%	63.1%

	2008-12'	2012-16'	2016-20'	2020-24'	2016-2024
Dixieland	2.0%	7.9%	-0.5%	3.7%	3.2%
Sweet Tea Suburbs	2.4%	-6.1%	-6.9%	1.5%	-5.4%
Republican Resettlers	2.0%	5.4%	-5.8%	4.4%	-1.4%
Soulful South	-1.8%	11.9%	0.6%	3.8%	4.3%
Trumpian Highlands	8.0%	5.9%	-3.2%	0.5%	-2.7%

	Pre-Trump	Post-Trump
Dixieland	29.3%	39.1%
Sweet Tea Suburbs	-2.9%	-11.9%
Republican Resettlers	16.9%	20.9%
Soulful South	-21.0%	-8.4%
Trumpian Highlands	55.9%	63.9%

Atlanta

GEORGIA

COASTAL PLAIN
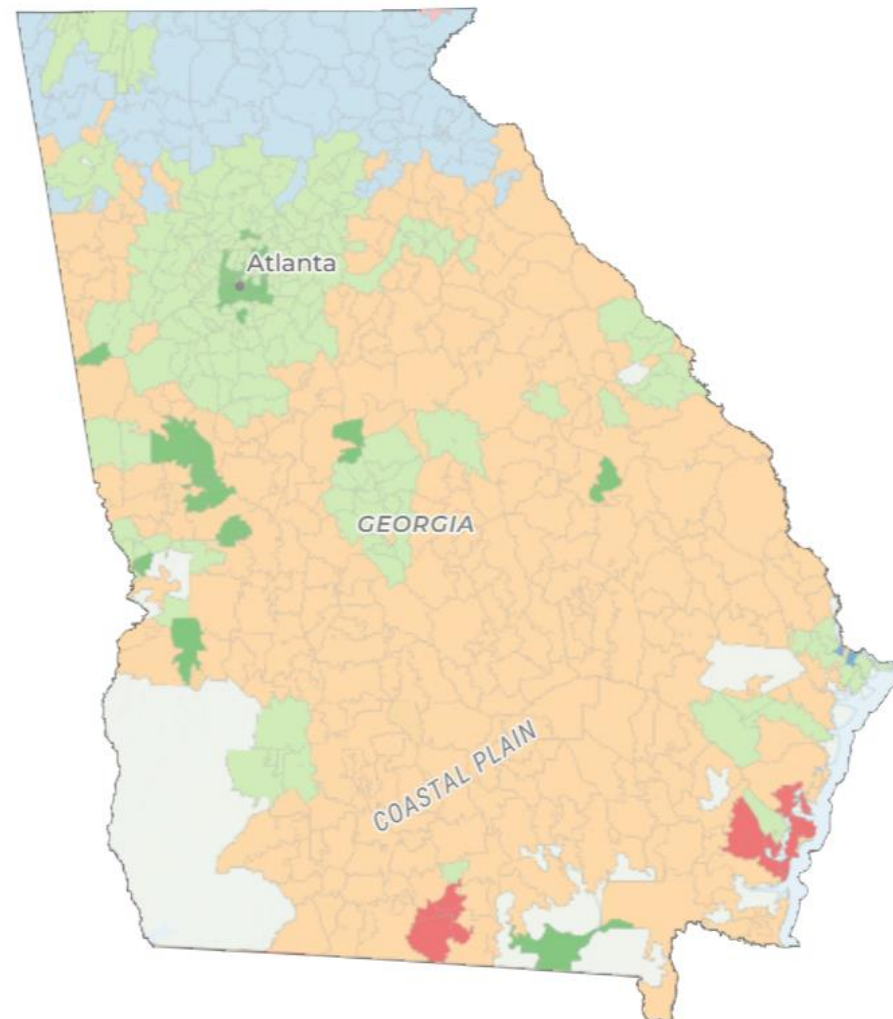
Methodology

- This analysis was conducted using data from 193,003 likely voters across Census-defined South region states. ZIP-code-level data was aggregated and analyzed using a k-means clustering algorithm to group areas into ten distinct clusters based on weighted variables such as income, education, voting patterns, ethnicity, and geographic location.

- Electoral results in the analysis were determined based on county-level results, with split-cluster counties assigned to the cluster that was more densely represented within the county.

- Blanks in the mapping represent ZIP codes where insufficient data was available to assign a cluster.

- The results provide insights into regional patterns and voter behavior, with variables scaled and weighted to emphasize connectivity and key demographic factors.

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