2024 Retrospective and Looking Forward

Blue Rose Research – March 2024

This presentation covers a few different types of data – election results, survey results, and our internal modeling

Election Results

Not all voterfile data is back yet – so this picture is evolving. Still, we have a fairly clear picture of what happened in the election from precinct-level data across the country, combined with our models of Democratic candidate support.

Survey Data

We conduct surveys online with substantial investments in modeling and other methods to control for data quality, and to make this data as representative as possible to the overall electorate. Our team collected 26M responses in 2024 nationally.

The point of highlighting this up front is that data isn't just numbers. Obviously data can be biased, and we do our best to present as matter-of-fact as possible – but **data is how we listen to voters**. It's essential that we understand what happened in this election, and we try not just to use data as a tool to push an agenda but as **a way to listen to voters and understand this moment in politics**.
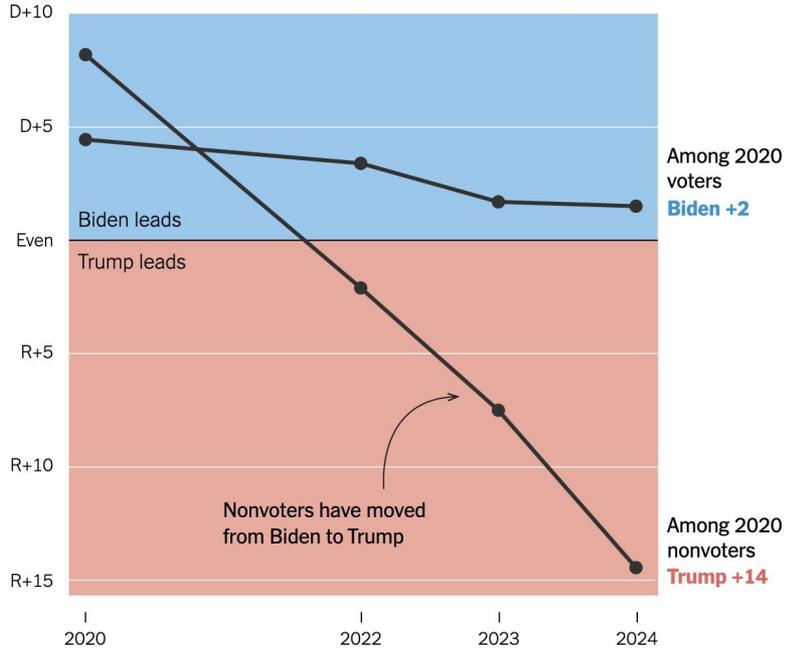
What Happened

Trends from 2016 to 2020 largely continued to play out from 2020 to 2024 – Hispanic and Asian voters, particularly moderates continued to swing away from Democrats

Race	Ideology	% of Registered Voters	Clinton 2016	Biden 2020	Harris 2024	Swing from '20 to '24	Swing from '16 to '24
White	Liberal	14%	94%	95%	94%	–1%	0%
	Moderate	25%	52%	55%	52%	–4%	0%
	Conservative	28%	7%	8%	7%	–1%	0%
Black	Liberal	3%	98%	98%	97%	0%	-1%
	Moderate	6%	96%	94%	93%	–1%	-3%
	Conservative	3%	85%	79%	77%	–2%	-8%
Hispanic	Liberal	3%	95%	92%	88%	–5%	-8%
	Moderate	**6%**	**81%**	**70%**	**58%**	**–12%**	**-23%**
	Conservative	4%	34%	24%	17%	–7%	-17%
Asian	Liberal	1%	96%	96%	93%	–3%	-3%
	Moderate	**3%**	**78%**	**76%**	**67%**	**–9%**	**-11%**
	Conservative	2%	28%	26%	20%	–6%	-8%

Initial estimates based on precinct data suggest that the change between 2020-2024 is about two-thirds attributable to vote switching and about one-third attributable to changes in who voted. We'll be able to estimate this with more precision once 2024 vote history data becomes available.

Politically disengaged voters have become much more Republican

Vote preference of registered voters, based on Times/Siena surveys

Among 2020 voters **Biden +2**

Biden leads

Trust leads

Nonvoters have moved from Biden to Trump

Among 2020 nonvoters **Trump +14**

Note: 2020 data is adjusted to election results • The New York Times

Swing in Democratic Vote Share from 2020 to 2024 by 2022 Midterm Turnout
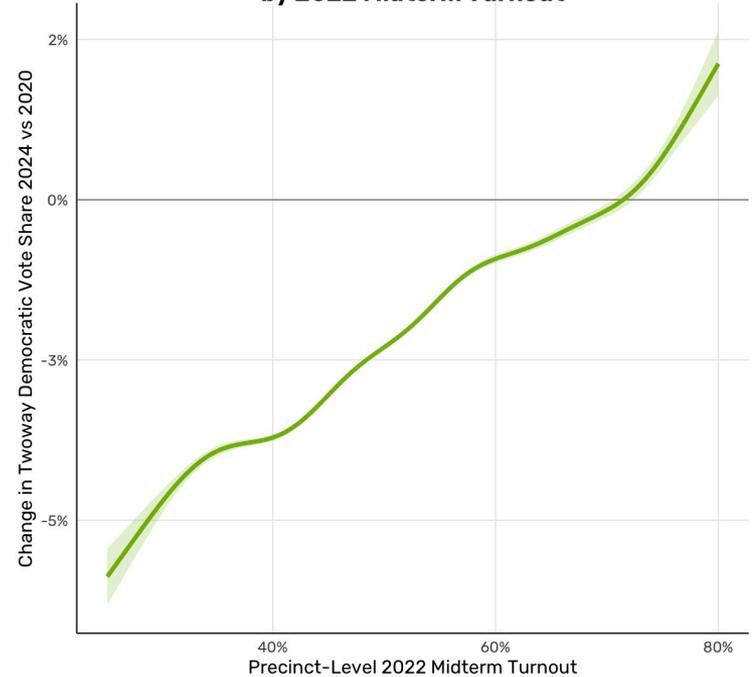
And because less-engaged voters swung away from us, an expanded electorate meant a more Republican electorate

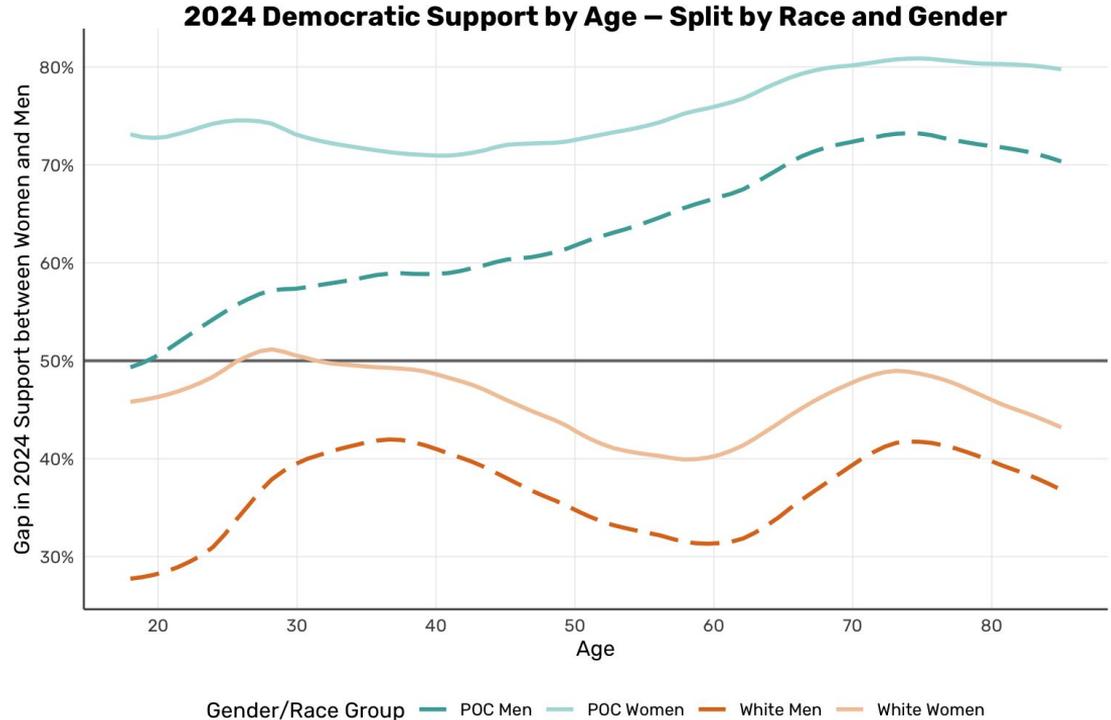| Universe	Harris	Trump	Margin
2022 voters	50.3%	49.7%	**Harris +0.6**
2024 Voters (What Happened)	49.3%	50.7%	**Trump + 1.4**
If Everyone Voted	47.6%	52.4%	**Trump + 4.8**

There's a turnout story this cycle – but a different one than we're used to talking about. With the combination of less-engaged and less-likely voters leaning more GOP, a larger electorate meant a more Republican electorate.

Projecting onto the full voter file, if every registered voter voted, it's likely that Trump would have won by even more.

Additionally, young voters – regardless of race and gender – have become more Republican, which will continue to pose challenges in future cycles if not addressed

Among voters under 26 years old, the only race-by-gender group to have majority support for Harris are women of color.

White men, white women, and men of color under 26 all supported Trump at rates greater than 50%.

2024 Democratic Support by Age — Split by Race and Gender

Gender/Race Group — POC Men — POC Women — White Men — White Women

Source: Blue Rose Research survey-based models, shifted to align with election results

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To zoom in on the gap between men and women, the difference in Democratic support between men and women has doubled for young voters

The gender gap between women and men is fairly stable – around 10% higher Democratic support among women – for voters between the ages of 40-70.

In this election, if you restrict to people under 25, we see that gap double in size to nearly 20pp.

There's been recent research showing that this is happening globally – and this isn't unique to American politics.
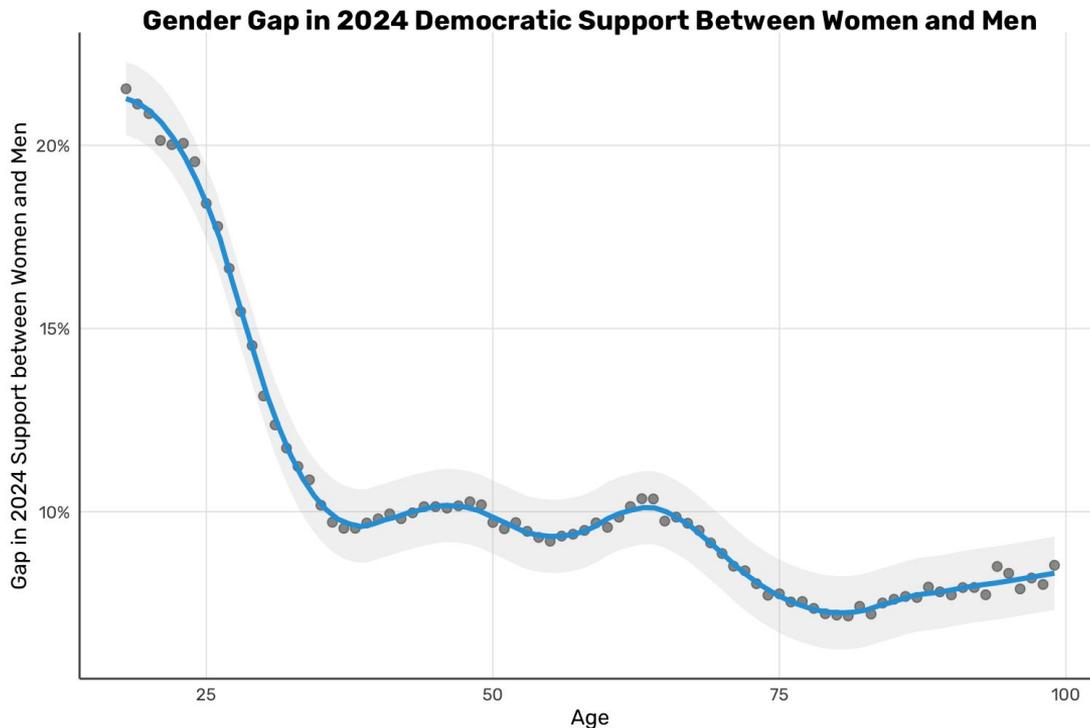
Gender Gap in 2024 Democratic Support Between Women and Men

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Precinct–level election results points to Trump making considerable gains in Black, Hispanic, and Asian immigrant neighborhoods throughout the country.

Our best estimate is that immigrant voters swung from a Biden+27 voting bloc in 2020 to a Trump+1 group in 2024.

This is not a small group either – naturalized citizens make up around 10% of the electorate.

US presidential-election results, %-point change in Republican vote share, 2020-24

Counties* with most
- Irish, Italian or Polish ancestry
- White college graduates
- Both   Other

Queens, NY
Nassau, NY *Long Island*
Miami-Dade, FL
Loudoun, VA *Washington, DC suburbs*
King, WA *Seattle*
Henry, GA *Atlanta suburbs*   Circle size=votes cast

Foreign-born population, 2018-22, % of total

*Counties with at least 90% of votes counted
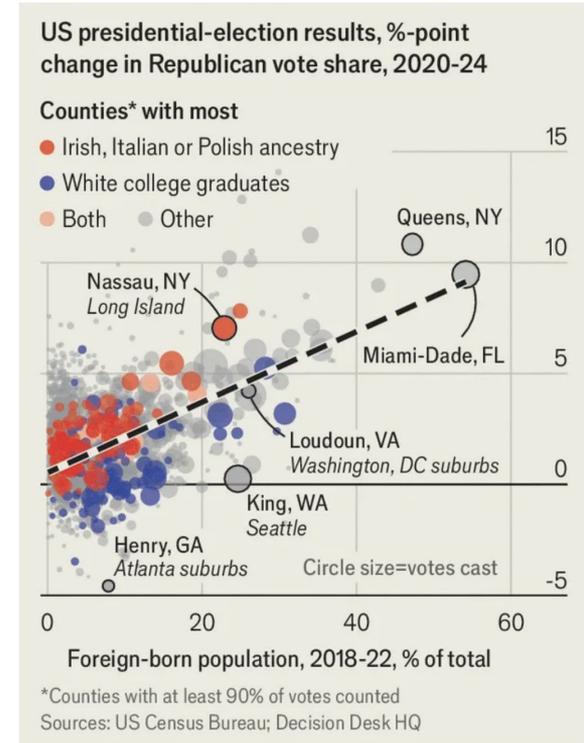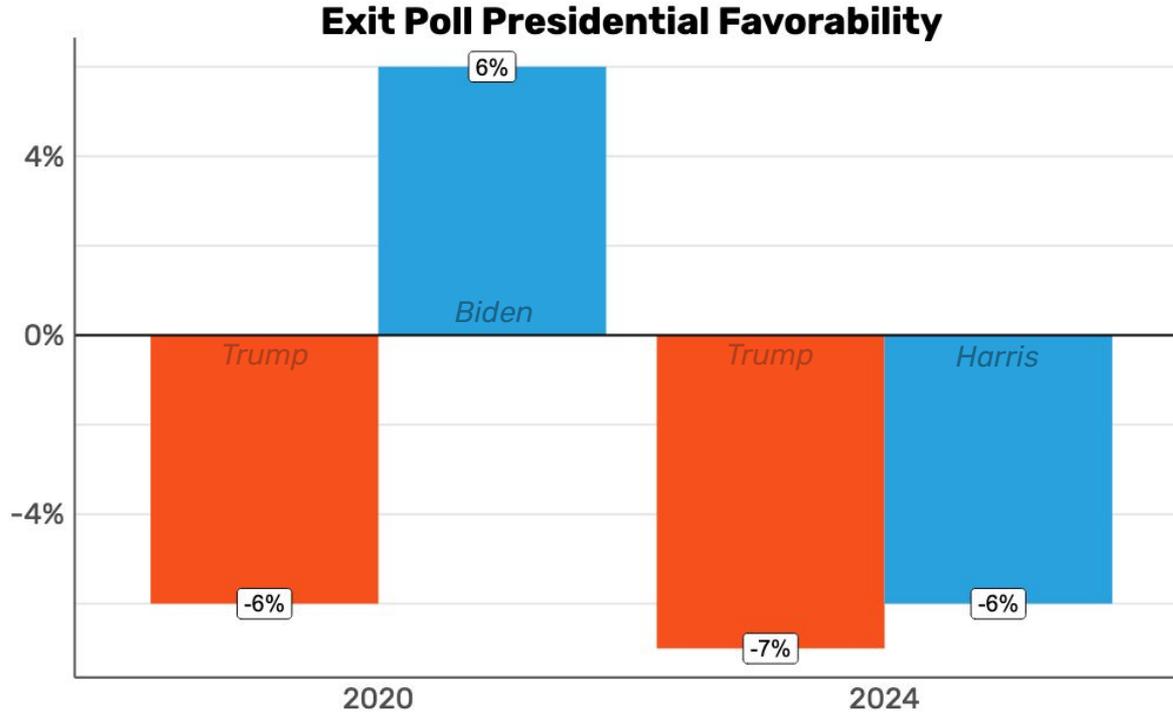Sources: US Census Bureau; Decision Desk HQ

CHART: THE ECONOMIST

How Did This Happen

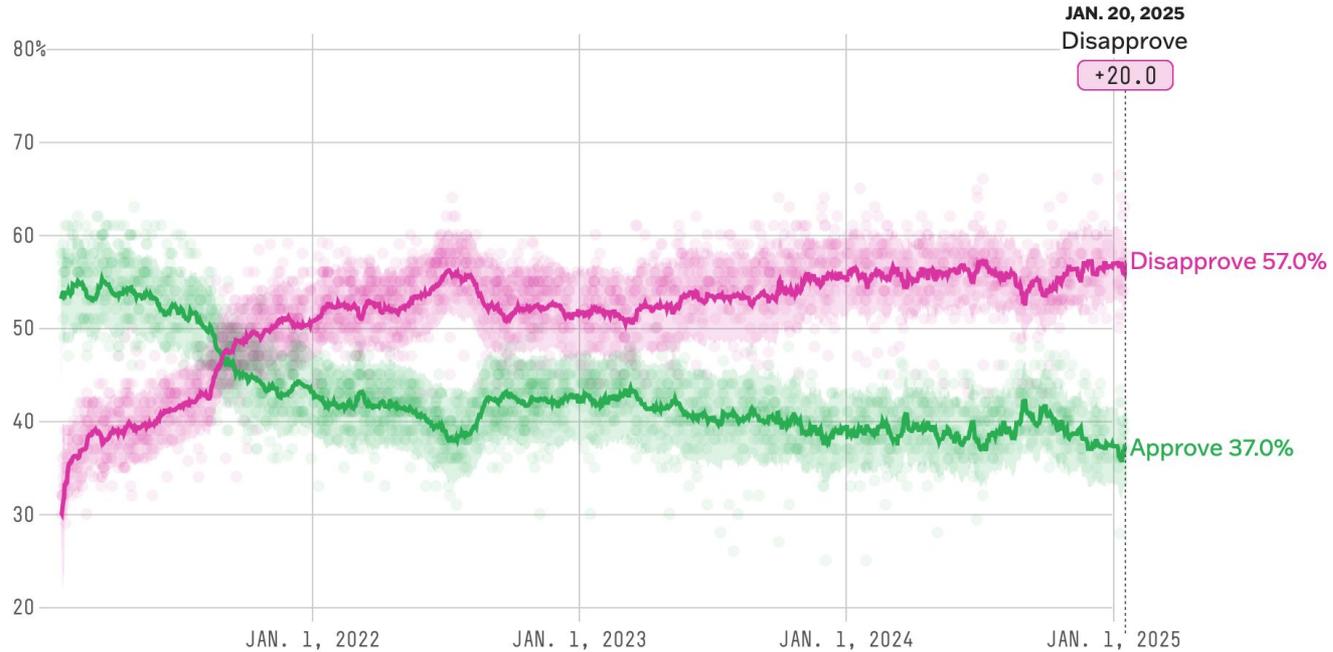**By election day 2024, Trump's favorability was nearly identical to where it was in 2020 – what changed is that Democrats became unpopular too**

Exit Poll Presidential Favorability

	2020	2024
Biden	6%	
Trump	-6%	-7%
Harris		-6%

Do Americans approve or disapprove of Joe Biden?

JAN. 20, 2025
Disapprove
+20.0
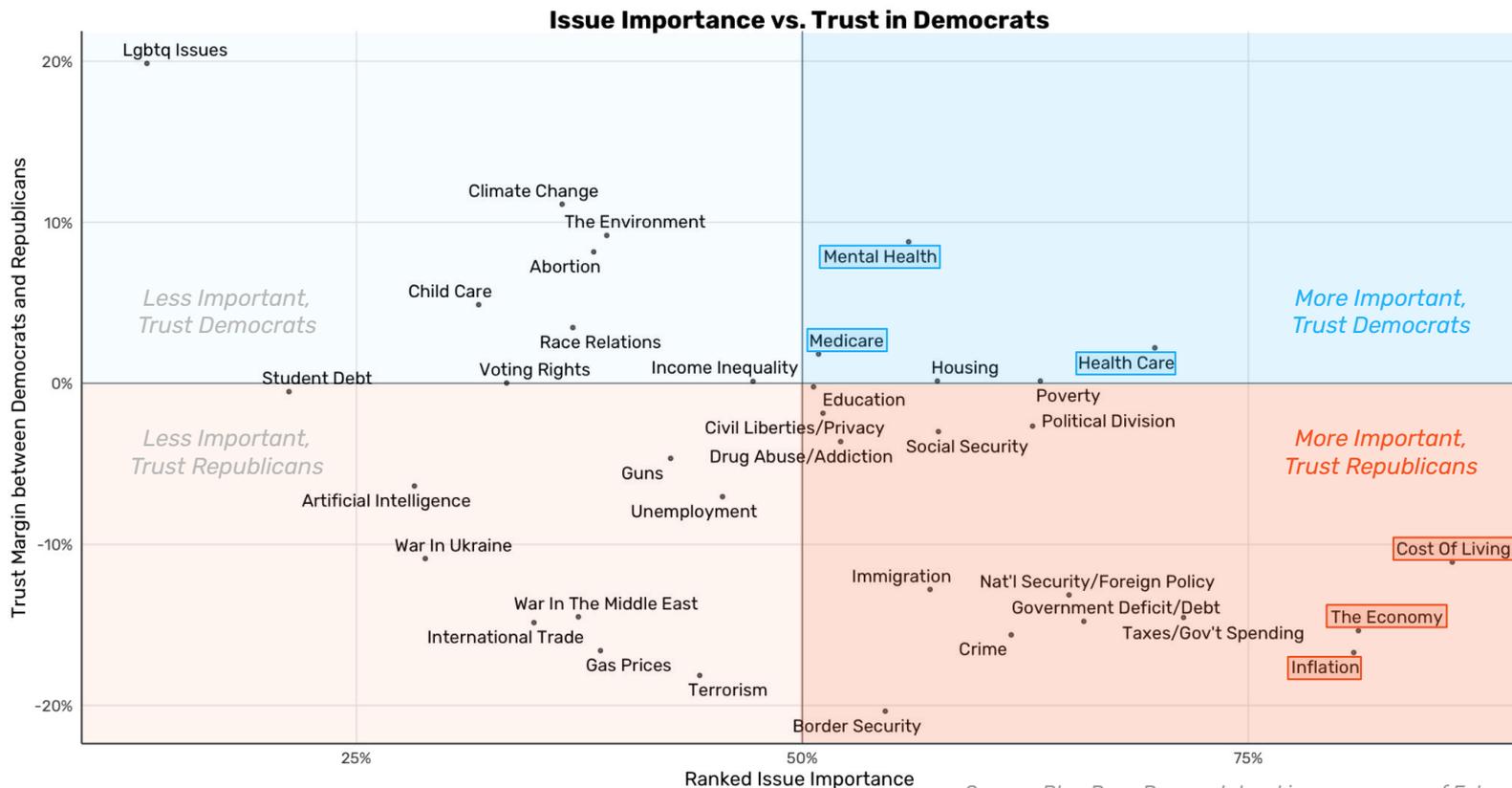
Disapprove 57.0%

Approve 37.0%

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And voters were telling us what they cared about – they cared about the cost of living more than every other issue

Side 1	Side 2	Percent of Voters Saying Side 1 is More Important Than Side 2
Cost of Living, Inflation	Student Debt	94%
Cost of Living, Inflation	LGBTQ Issues	94%
Cost of Living, Inflation	Race Relations	87%
Cost of Living, Inflation	Income Inequality	85%
Cost of Living, Inflation	Voting Rights	84%
Cost of Living, Inflation	The Environment, Climate Change	84%
Cost of Living, Inflation	Abortion	79%
Cost of Living, Inflation	Immigration, Border Security	69%

In our ongoing tracking surveys, we ask voters which of two randomized issues they see as more important – to help assemble a rank order of issue importance for voters overall.

When voters were shown **Cost of Living** or **Inflation** as options against **LGBTQ Issues** or **Student Debt**, 94% of respondents overall choose **Cost of Living/Inflation**.

Voters trust Republicans more than Democrats by huge margins on the issues they say are the most important

Issue Importance vs. Trust in Democrats

Chart plotting Trust Margin between Democrats and Republicans (y-axis) against Ranked Issue Importance (x-axis).

Quadrant labels:
- *Less Important, Trust Democrats* (upper left)
- *More Important, Trust Democrats* (upper right)
- *Less Important, Trust Republicans* (lower left)
- *More Important, Trust Republicans* (lower right)

Data point labels:
- Lgbtq Issues (~20%)
- Climate Change (~11%)
- The Environment (~9%)
- Abortion (~7%)
- Child Care (~5%)
- Mental Health (~9%)
- Race Relations (~2%)
- Voting Rights (~0%)
- Income Inequality (~0%)
- Medicare (~2%)
- Housing (~1%)
- Health Care (~2%)
- Student Debt (~0%)
- Education (~-1%)
- Poverty (~-1%)
- Civil Liberties/Privacy (~-3%)
- Political Division (~-2%)
- Social Security (~-3%)
- Drug Abuse/Addiction (~-4%)
- Guns (~-5%)
- Artificial Intelligence (~-6%)
- Unemployment (~-7%)
- War In Ukraine (~-11%)
- Immigration (~-12%)
- Nat'l Security/Foreign Policy (~-13%)
- Cost Of Living (~-11%)
- War In The Middle East (~-15%)
- International Trade (~-15%)
- Government Deficit/Debt (~-15%)
- Crime (~-16%)
- Taxes/Gov't Spending (~-16%)
- The Economy (~-16%)
- Gas Prices (~-18%)
- Inflation (~-17%)
- Terrorism (~-18%)
- Border Security (~-21%)

X-axis: Ranked Issue Importance (25%, 50%, 75%)
Y-axis: Trust Margin between Democrats and Republicans (20%, 10%, 0%, -10%, -20%)

Source: Blue Rose Research tracking surveys as of February 2025

In our data from last cycle, economic messaging that connected directly to voters lives tended to be most effective

Top testing ads most often:

1. Acknowledging voters feeling squeezed by rising costs, showed how Harris would **improve voters' economic lives**.

2. Show that she has real plans that she would follow through on as President – vs. **how Trump was more focused on helping wealthy elites**.

3. Used **personal stories** to connect policy to the impact on voters lives – especially in **costs, health care, abortion**.

Direct-to-camera ad of VP Harris talking about lowering costs

*VP: I get it. **The cost of rent, groceries, and utilities is too high. So here's what we're going to do about it. We will lower housing costs by building more homes, and crack down on landlords who are charging too much. We will lower your food and grocery bills by going after price gougers** who are keeping the cost of everyday goods too high. I'm Kamala Harris, and I approve this message, because you work hard for your paycheck. You should get to keep more of it. As president, I'll make that my top priority.*

Contrasting Trump raising prices and looking out for billionaires

*VP: Building that middle class will be a defining goal of my presidency. Compare that to Trump. **He fights for himself and his billionaire friends. He intends to enact a national sales tax, the Trump tax that would raise prices on middle-class families by $4,000 a year.** Instead of a tax hike, we will pass a middle-class tax cut that will benefit more than 100 million Americans.*

These two spots were in the top 1% of ads tested at increasing Harris support

There was a lot of ticket splitting – and many downballot Democrats overperformed the top of the ticket

State	Harris '24	Senate '24	Senate vs Harris
MD	64.7%	56.0%	-8.7%
AZ	**47.2%**	**51.2%**	**4.0%**
NV	48.4%	50.9%	2.5%
WI	49.6%	50.4%	0.9%
MI	49.3%	50.2%	0.9%
PA	49.1%	49.9%	0.8%
OH	44.4%	48.1%	3.8%
NE	39.6%	46.7%	7.1%
MT	39.7%	46.4%	6.7%
TX	43.0%	45.6%	2.6%
FL	43.4%	43.5%	0.1%

Speaking to concerns on immigration, distance from admin

*Ruben Gallego knows what it means to protect our country and our flag. He's a Marine. Ruben knows that Arizona families deserve to feel safe. **He delivered critical funding for our law enforcement community, and he knows that to secure our border, we need more agents and better technology**. That's why the Arizona Police Association supports Ruben. He'll work with anyone in Congress to deliver for Arizona, and keep our families safe and secure.*

Attacks on the GOP siding with billionaires and cutting benefits

*I had a paper route at 13, so I've been working, literally, for 60 years. And I've taught school all my life. **We both paid in and earned our Social Security. And we depend on it to get by. But Kari Lake would risk our benefits just to give tax breaks to the billionaires** paying for her campaign. She wants to yank it out from under us. Kari Lake couldn't care less about Arizona families. She only cares about herself and her own power.*

These two spots were in the top 10% of ads tested at increasing Gallego support

Throughout the cycle, voters were more concerned with economic issues and looking for a shock to the system, not the preservation of institutions

Which is <u>more important</u> right now?

Response	Overall
Preserving America's institutions	18%
Delivering change that improves Americans' lives	78%
Not sure	5%

Which of the following do you agree with the most, even if none are exactly right?

Response	Overall
Things are going well in America and no real changes are needed from whoever becomes President	3%
Things could be going better in America and what is needed is a return to basic stability from whoever becomes President	37%
Things in America are going poorly and what is needed is a major change and **a shock to the system** from whoever becomes President	53%
Not sure	7%

Voters saw Harris as more ideologically extreme than Trump

Relative to yourself, where would you place Kamala Harris on the following issues?

Response	Overall	2024 Vote: Harris	2020 x 2024 Vote: Swing	2024 Vote: Trump
More liberal than me	**49%**	24%	55%	75%
Close to my views	27%	53%	17%	2%
More conservative than me	7%	11%	8%	4%
Not sure	16%	13%	20%	19%

Relative to yourself, where would you place Donald Trump on the following issues?

Response	Overall	2024 Vote: Harris	2020 x 2024 Vote: Swing	2024 Vote: Trump
More liberal than me	7%	7%	10%	6%
Close to my views	33%	2%	26%	64%
More conservative than me	**39%**	60%	41%	18%
Not sure	22%	31%	23%	12%

In the end, these voting patterns reflected an electorate that believed Trump best understood how to make people's lives better

Which presidential candidate do you think showed they had the ability to make your life better?

Response	Overall	White Non-Col	White College	Black	Hispanic	Asian
Only Harris showed she had the ability to make my life better	32%	20%	39%	58%	33%	32%
Only Trump showed he had the ability to make my life better	**43%**	**60%**	**37%**	**10%**	**38%**	**35%**
Both Trump and Harris showed they had the ability to make my life better	4%	3%	3%	6%	6%	5%
Neither Trump nor Harris showed they had the ability to make my life better	12%	8%	15%	14%	12%	16%
Not sure	8%	8%	6%	11%	11%	11%

There's been wide adoption of platforms like TikTok not mediated by traditional media – and voters on these platforms, often less engaged in politics, swung more towards Trump

About 4 in 10 young adults in the U.S. now regularly get news on TikTok

% of U.S. adults who regularly get news from TikTok, by age group
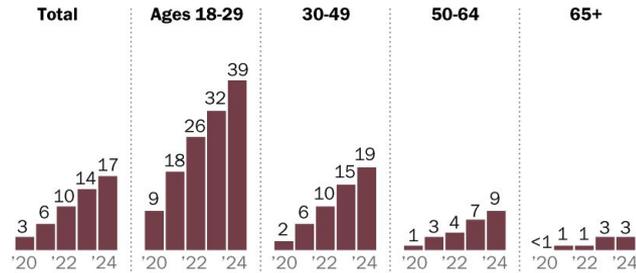
Source: Survey of U.S. adults conducted July 15-Aug. 4, 2024.

PEW RESEARCH CENTER

Do you use [platform] to get news?	Biden 2020	Harris 2024	Support Swing
Broadcast	60%	58%	-2.2%
Local TV	54%	52%	-2.3%
Facebook	49%	45%	-3.7%
Twitter	49%	45%	-4.4%
Tiktok	**57%**	**51%**	**-5.9%**

Among TikTok Users

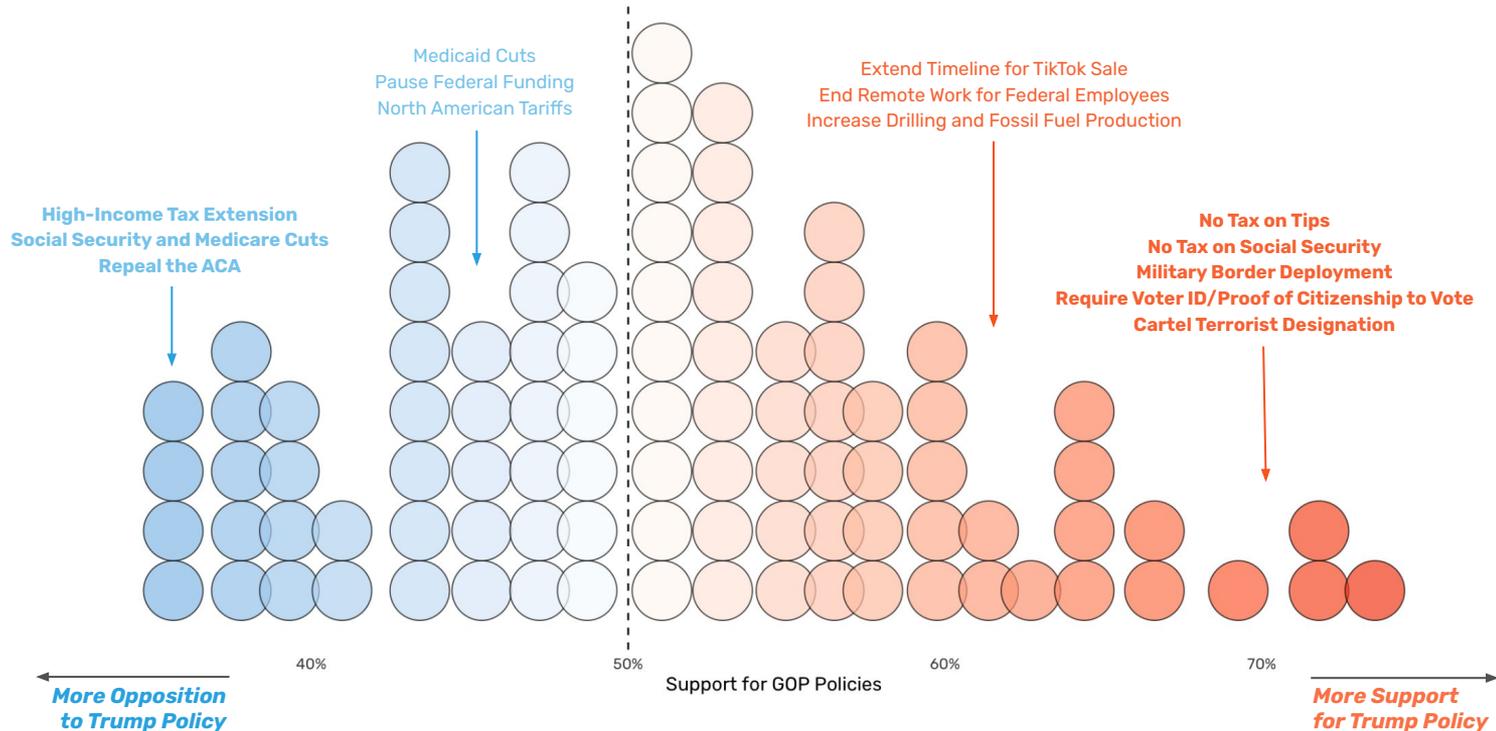| How Important is politics to your identity?	Biden 2020	Harris 2024	Support Swing
Very Important	59%	55%	-4.0%
Somewhat Important	58%	52%	-5.4%
Not Too Important	56%	49%	-7.0%
Not Important	56%	48%	-8.2%

The world changed in the past four years, and voters getting news from platforms like TikTok swung more to the GOP – especially those less engaged in politics. As long as these platforms and algorithms exist, Democrats need to be positioned to use them effectively – especially those not engaged in or actively seeking out politics.

Where Things Stand

Many, but not all, of the Trump administration's policies have been popular – least popular policies are those that end widely-used benefits, cancel federal spending on direct services, or impose tariffs that raise costs

Support for Trump Administration Policies

Each dot shows two-way support for a GOP policy

Medicaid Cuts
Pause Federal Funding
North American Tariffs

Extend Timeline for TikTok Sale
End Remote Work for Federal Employees
Increase Drilling and Fossil Fuel Production

High-Income Tax Extension
Social Security and Medicare Cuts
Repeal the ACA

No Tax on Tips
No Tax on Social Security
Military Border Deployment
Require Voter ID/Proof of Citizenship to Vote
Cartel Terrorist Designation

40%   50%   60%   70%

Support for GOP Policies

More Opposition to Trump Policy

More Support for Trump Policy

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Source: Blue Rose Research surveys via online web panels, N=29,293, November 15-February 23

We have been seeing in our data that messages about increased costs, or cutting benefits at the expense of the working class, have been driving the most movement against Trump and the GOP

Summary	Democrats say you should oppose Donald Trump because…	Trump Disapproval	Percentile
Cutting Medicare and Social Security	…he's talked about **making cuts to Medicare and Social Security**, earned benefits that seniors paid into their whole lives. But Trump calls these programs "entitlements" and has expressed openness to cutting them in order to finance his huge new tax breaks for the wealthiest Americans that they don't need.	+2.5%	96%
Letting Elon Slash Budgets – Hurting Americans	…he is **letting Elon Musk slash Federal budgets with no oversight, checks, or balances**. Musk gave $250 million to Trump's campaign, and now Trump is letting Musk reshape the government in ways that advance Musk's interests, even if they **hurt working Americans by cutting the basics like Medicaid and public schools**.	+2.2%	87%
Letting Elon Slash Budgets – Putting Privacy At Risk	…he is letting Elon Musk slash Federal budgets with no oversight, checks, or balances. Trump has given Musk unprecedented and unlawful access to millions of Americans' personal information - including Social Security numbers - **putting Americans' personal privacy and security at risk**.	+2.2%	83%
Slashing ACA/Medicaid, Leading to Worse Care and Higher Costs	…he's slashing Affordable Care Act expansions that increased access to affordable healthcare for millions of Americans. **By eliminating policies that insure more Americans and cutting Medicaid, working families are left with fewer coverage options, higher premiums**, and more financial strain when costs are already too high.	+2.2%	82%
Giving Huge Tax Breaks for the Ultra-Rich	…his plans give **huge new tax breaks to billionaires and big corporations, paid for by cutting the basics that working people depend on**. Trump's plans slash spending for Medicaid, making healthcare more expensive for millions of working Americans and seniors, to pay for a tax cut for the ultra-wealthy.	+2.2%	80%
Imposing Tariffs, As A National Sales Tax	…he's imposing tariffs on imported goods, which will effectively be a national sales tax, increasing costs for American consumers and raising inflation. Middle class and working Americans will face higher prices on everyday items like electronics, clothing, and food, making it harder to support their families.	+2.1%	79%
Letting Elon Slash Programs to Benefit Himself	…his plans give huge new tax breaks to billionaires paid for by cutting the basics that working people depend on. Trump is letting Elon Musk slash budgets for programs like Medicaid to pay for a tax cut for billionaires like himself — and Musk will put other benefits like Social Security and Medicare at risk.	+2.1%	76%
Passing a One Party Power Grab to Cut Government Services without Compromise	…he's trying to pass massive tax breaks for billionaires and cuts to government services like Medicaid without any compromise or Democratic support. It is a one party power grab designed to bypass the will of the American people to pass deeply unpopular policies that will hurt working families and seniors.	+2.1%	72%
Imposing Tariffs that will Increase Costs	…he's imposing tariffs on imported goods from Canada, Mexico and China, three of America's biggest trading partners. These tariffs will mean middle and working class Americans will face higher prices on electronics, clothing, and especially groceries making it harder to support their families.	+2.0%	68%
Repealing Laws that Lower Health Care/Drug Costs	…he is working to repeal a law that lowers the cost of health care and prescription drug costs and caps insulin costs at $35 a month for seniors. By repealing this law, Trump will increase the cost of lifesaving medicine for millions and create more financial strain when costs are already too high.	+1.9%	56%

Source: Blue Rose Research surveys via online web panels, N=16,213, January 22-30 23

We don't have to choose between talking to swing voters OR talking to infrequent voters – it's a false choice

Higher Wages (100% Swing, 100% Infrequent Voters):
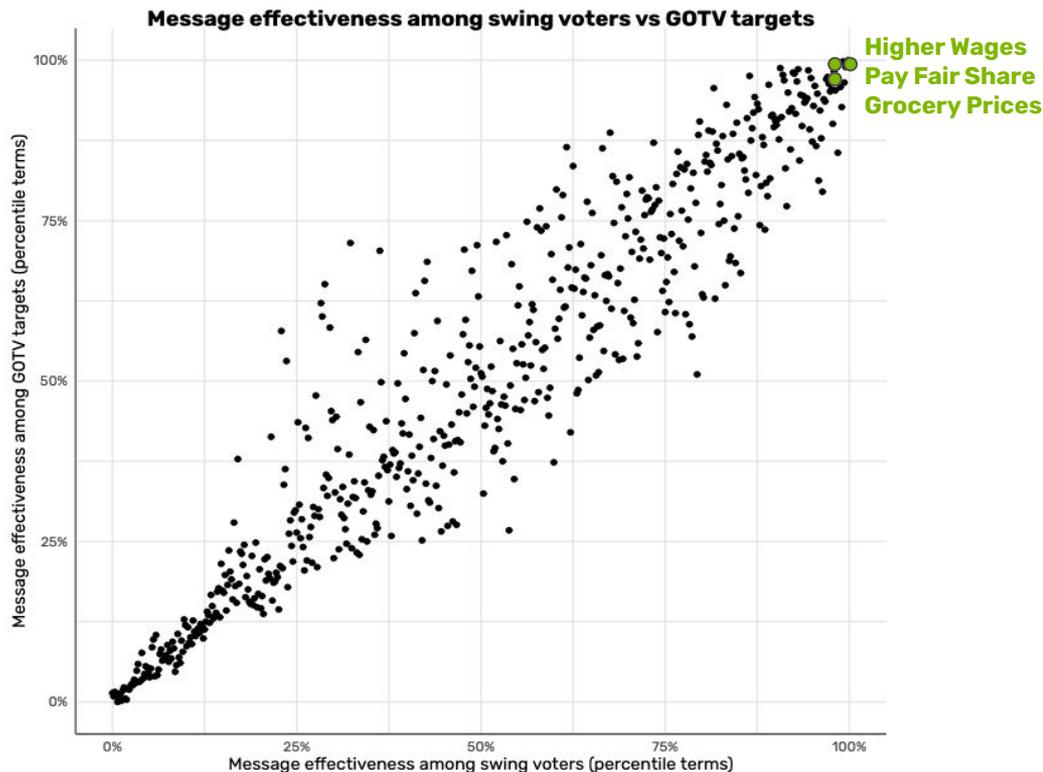*…Harris understands that middle class life has become unaffordable. As President, she will work to lower everyday costs. She'll also work to increase wages and expand worker protections for hard working Americans, allowing them to pay the bills and support their families. Everyone should be able to earn a living wage and Harris will fight to make sure that wages grow.*

Pay Fair Share (99% Swing, 100% Infrequent Voters)
…Harris is working to grow our economy by raising Americans' incomes and lowering costs. Harris just proposed a new budget that will invest in the middle class, bring down costs on medicine, housing, child care, healthcare, reduce poverty, protect Social Security and Medicare and put the budget on a responsible course. The key to getting those done is to ensure the rich pay their fair share in taxes.
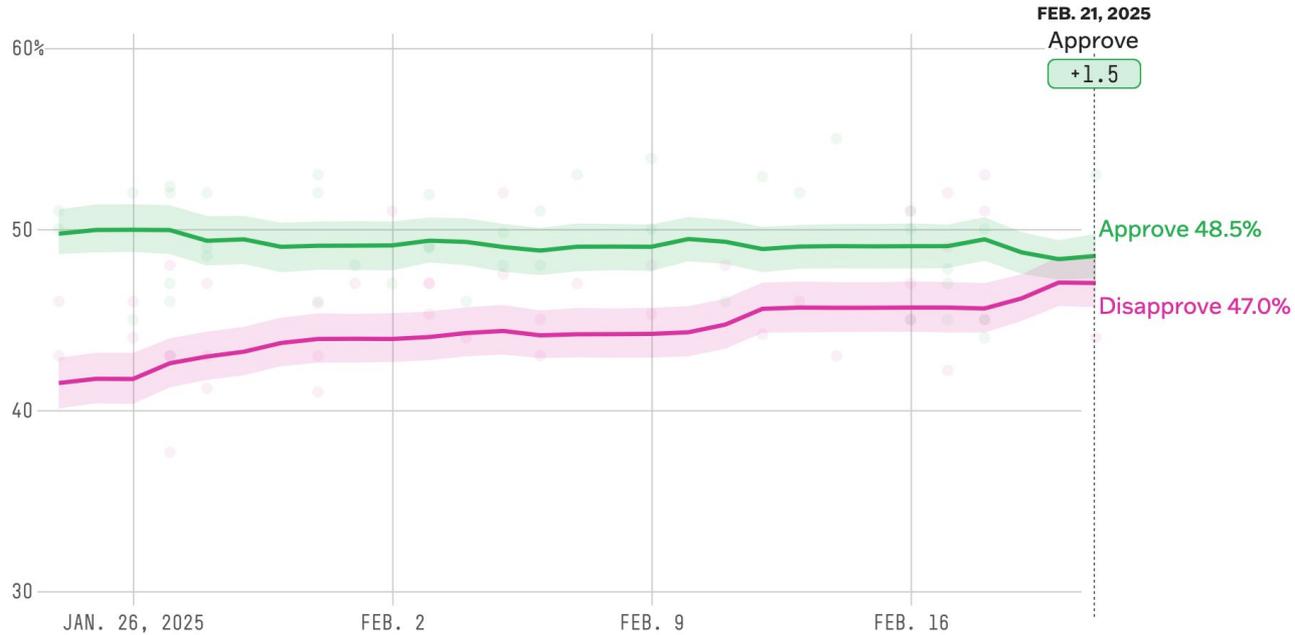
Grocery Prices (98% Swing, 95% Infrequent Voters)
…American families are struggling with higher food and grocery costs because eight corporations control a vast amount of the food we buy. Democrats are investigating grocery price-fixing and will work to pass a new national ban on price gouging by food suppliers and grocery chains. Trump Republicans' plan to give billionaires and corporations a massive tax cut will explode the deficit and result in higher inflation.

Message effectiveness among swing voters vs GOTV targets

Higher Wages
Pay Fair Share
Grocery Prices

Source: Blue Rose 2024 message testing 24

Trump is vulnerable – we just need to drive the best arguments against him

Do Americans approve or disapprove of Donald Trump?

FEB. 21, 2025
Approve
+1.5

Approve 48.5%

Disapprove 47.0%

60%

50

40

30

JAN. 26, 2025   FEB. 2   FEB. 9   FEB. 16

We can't get stuck fighting the battles of the past

Performance of AI models at difficult human tasks – problem solving, answering advanced math and science questions – has drastically increased and is close to on-par with human performance.

As with Covid, change may happen so fast that it leaves decision-makers behind the curve.

AI performance vs human performance on select benchmarks
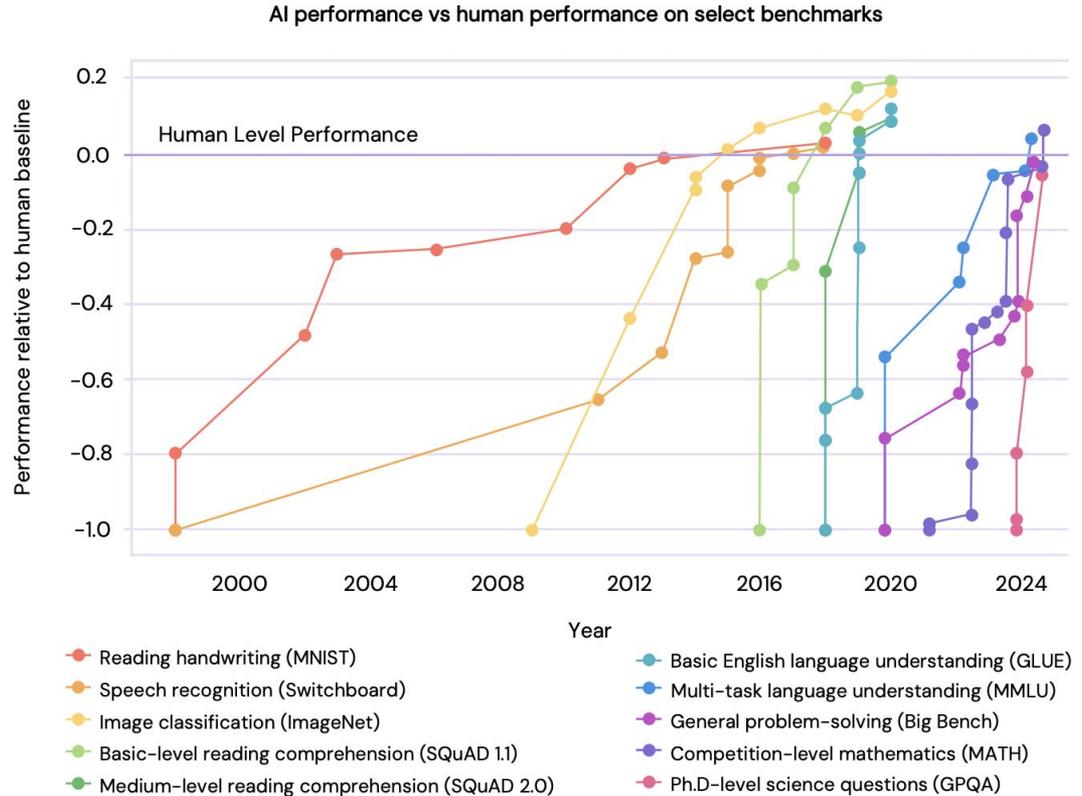
We have to prepare for the fights of tomorrow rather than gearing up to win the last war – and voters know that these changes are coming

Question	Response	Topline
Do you believe that within the next 10 years, we will have AI that can perform most jobs better than humans can?	Strongly Agree	18%
	Somewhat Agree	46%
	Somewhat Disagree	21%
	Strongly Disagree	16%
	Net Agree	64%
	Net Disagree	36%

...but the vast majority of voters largely see this shift as a net negative for our society

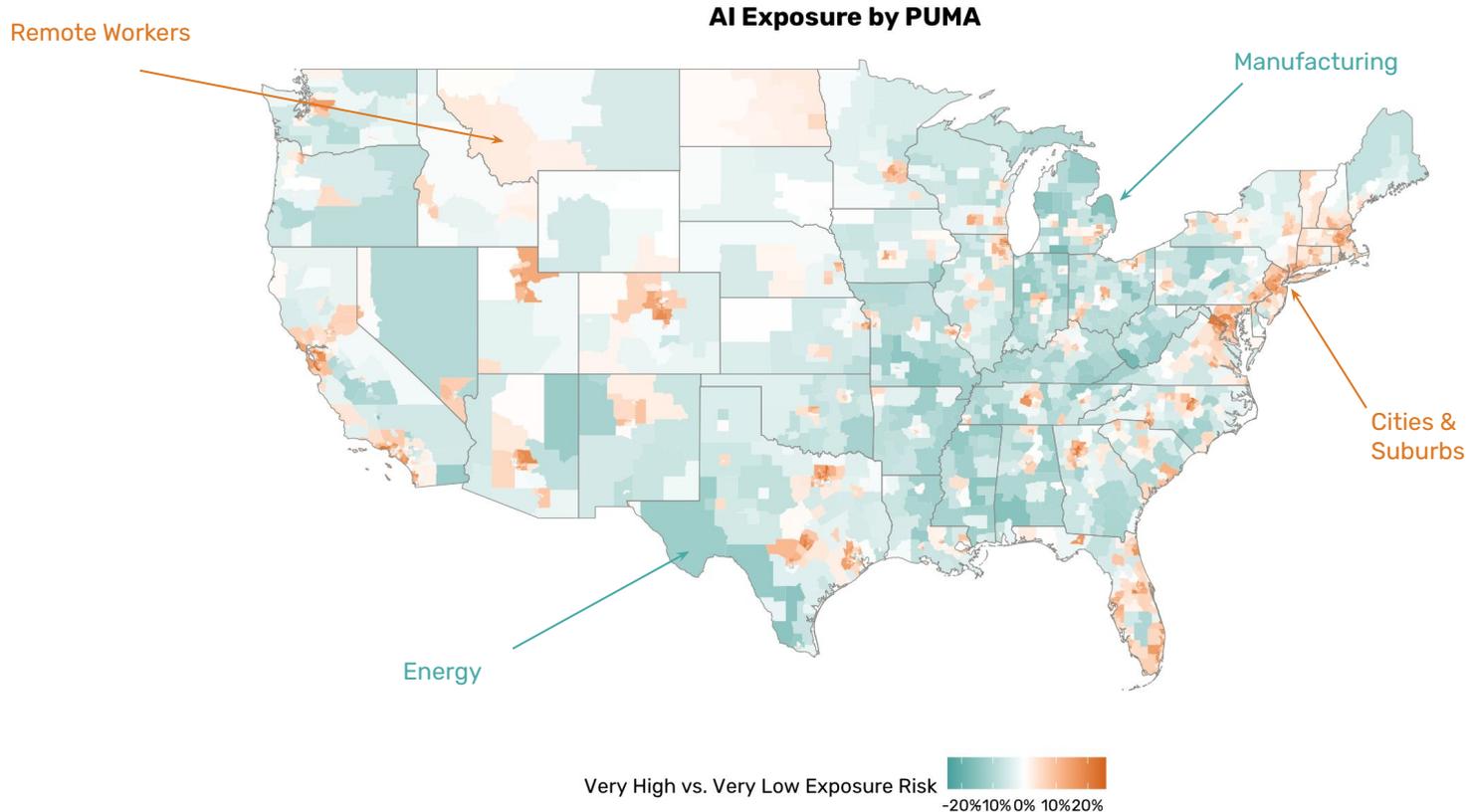| Question	Response	Topline
If we develop AI that can perform most jobs better than humans can, do you think this would be:	Very good	5%
	Somewhat good	17%
	Somewhat bad	26%
	Very bad	53%
	Net Good	21%
	Net Bad	79%

Americans most likely to lose their jobs are in professions that lean more liberal and more towards Democrats – and the coming AI transition is likely to exacerbate existing political fault lines

This data draws from work done by researchers identifying the occupations most at risk for AI job exposure in the short term.

We then asked 2.1M people their occupation via our surveys, and identified 27 million Americans who are in this high-risk category on the voter file.

Category	Subgroup	% of Group with Very Low or Very High AI Exposure		
		Very Low	Very High	Difference
Gender	Women	10%	23%	13%
	Men	23%	18%	-5%
Education	Less than High School	38%	7%	-31%
	High School Graduate	29%	13%	-17%
	Some College	19%	20%	1%
	Associates Degree	15%	21%	6%
	Bachelor's Degree	7%	28%	21%
	Advanced Degree	7%	23%	16%
Income	Under 25k	32%	9%	-23%
	25k to 50k	25%	15%	-10%
	50k to 75k	21%	18%	-3%
	75k to 100k	17%	20%	2%
	100k to 150k	14%	22%	8%
	Over 150k	12%	25%	13%
Occupation	Skilled Trades & Technical	57%	0%	-57%
	Manufacturing & Transportation	43%	7%	-37%
	Customer & Personal Service	20%	3%	-17%
	Education & Healthcare	7%	5%	-2%
	Office Workers	4%	40%	35%
POTUS 2024	Harris	11%	24%	13%
	Trump	17%	20%	4%
	Did not vote	21%	17%	-4%

The risk of job losses to AI are mainly in cities and liberal strongholds – whereas more conservative areas will be insulated for longer

AI Exposure by PUMA

Remote Workers

Manufacturing

Cities & Suburbs

Energy

Very High vs. Very Low Exposure Risk

-20% 10% 0% 10% 20%

To wrap up...

Negative attitudes towards Democrats cost us the election: Losses are always over-determined, but the key reason why Democrats lost in 2024 was widespread negative ratings Biden's his handling of the economy and other salient issues, and a sense from voters that Democrats were under-reacting to their concerns.

Coalitions are shifting: These assessments were widespread - and have created a new set of political coalitions with young, non-white, foreign born, and less politically engaged voters shifting hard to the right.

We have to be clear-eyed about Trump and GOP appeal: Trump and Republicans are vulnerable in future elections, but only if Democrats are hard-nosed about what is truly unpopular in the GOP agenda, and if Democrats can make itself a credible opposition party in the minds of voters.

Our political landscape is about to change even more rapidly: Much of the current discourse is mired in ideological battles of the past - but AI may change this landscape swiftly and irrevocably, potentially in ways that reinforce existing political divides.

We have to gear up to fight the next fight: The challenge now is to be prepared for the dramatic ways in which the economic, policy, and political foundations to our society will shift in the coming years - and offer voters compelling solutions that are responsive to their needs and aspirations.

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