



Voters to Washington in 2024:

The Rise of Independents and Decline of Democrats

An analysis of the 2024 Presidential Election

The Winston Group
101 Constitution Ave. NW, Suite 710 East
Washington, DC 20001
www.winstongroup.net

 THE WINSTON GROUP
making ideas matter™

Key Points

For the first time since the Watergate era, independents surpassed one of the major political parties to rank second in terms of party identification. In this presidential election, the percentage of the electorate that self-identified as Democrats came in behind independents. This extends a downward trend for Democrats that began in 2012, reaching a record low this year and making a major difference for Republican prospects going forward.

Party ID — Democrats' proportion of the electorate significantly drops to a historic low, making Democrats de facto the third party in this election.

- Democrats went from 37% of the Presidential electorate in 2020 to 31% in 2024, a 6-point drop.
- Independents went from 27% in 2020 to 34% in 2024, a significant 7-point increase.
- While the overall percentage of the electorate that was Republican decreased by 1%, going from 36% in 2020 to 35% in 2024, Republicans had a +4 party ID advantage, after not having any advantage in the ten prior presidential elections.
- Republicans had a presidential party ID advantage over Democrats in all of the seven competitive states, and independents were a larger portion of the electorate than Democrats in five of those states.
- These shifts were significant positives for Republicans at the Congressional level, who were able to sustain their 2022 party ID advantage of +3 points as independents surpassed Democrats who fell to third place as a portion of the Congressional electorate as well.

Issues — The economy, not abortion.

- The first election of Trump in 2016 was a rejection of the status quo and political establishment. The 2024 election was a rejection of the policy direction of the Biden-Harris administration. The view of the economy was extremely negative. The overwhelming majority said inflation had been a hardship, and a large portion of the electorate said their financial situation had gotten worse in the last four years.
- While Democrats tried to focus on abortion to take attention off the economy, in the end, polls showed Biden's negative job approval overwhelmed the Harris messaging and tied her to his record.
- The electorate's prioritizing of the candidate attributes of leadership and change —which Trump won decisively—helped overcome his negative image in voter decision-making.

Key voters — Who moved.

- Harris could not sustain Biden's performance with independents. He won them by 13 points; her margin was only 3.
- Trump won 46% of Hispanics, a significant increase from 32% in 2020.
- Among women, Harris' margin was only +8, compared to +15 for Biden in 2020 and +13 for Clinton in 2016.
- Late deciders broke for Trump 51-42.

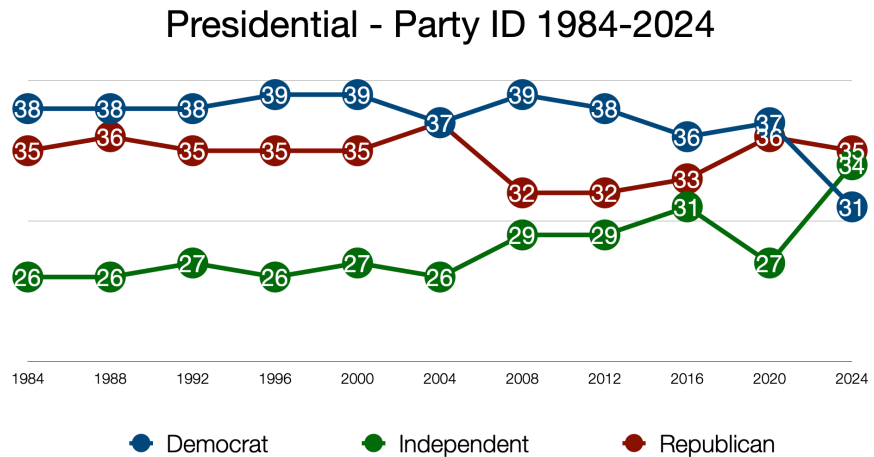
Methodology

This report is based on the Winning the Issues Election survey of 1,250 respondents who voted in the 2024 election (November 3-5, 2024) and Edison Research exit polls.

Changes in the Electorate

Historic Low for Democrats

While Republicans slipped slightly as a percentage of the electorate, going from 36% in 2020 to 35% in 2024, Democrats dropped 6%, going from 37% in 2020 to 31% in 2024. This led to a historic party ID advantage for Republicans of +4, with Republicans at 35% of the electorate compared to Democrats at 31%. This wasn't just simply the lowest percentage for Democrats 1984 forward. This was far below the prior lowest performance of 36%, which occurred in 2016. This was seen at the state level as well. Republicans had party ID advantages over Democrats in all of the seven competitive presidential states, while Democrats finished behind both Republicans and independents as a portion of the electorate in five of the seven states.



This means that, in this election, Democrats are de facto more a third party than a dominant party in the electorate, as independents represent more of the electorate than Democrats by a margin of 3-points. **To provide a sense of scale of the size of this shift, a comparison of 37% of the 2020 presidential turnout to 31% of the 2024 turnout shows there were over 10 million fewer self-identified Democrats voting in the this last election.** Independents went the other direction, going from 27% in 2020 to 34% in 2024 which resulted in an increase in self-identified independents of about 10 million.

Independents Increase In Size And Influence

In contrast to Democrats dropping, independents increased in size to 34% of the electorate (as shown in the green line in the above chart). This is the largest percentage of independents from 1984 forward — solidifying the rise of independents' influence in election outcomes. Prior to the election, we flagged that Harris did not seem to be carrying independents at the same scale as Biden did in 2020 (13 points), which would make her coalition look more like Hillary Clinton's 2016 effort than Biden's 2020 campaign. That is what happened. The exit poll margin shows Harris winning independents by 3. But this

	Party ID 2024			Party ID Margin
	Dem	Ind	Rep	(Rep-Dem)
National	31	34	35	+4
AZ	28	38	34	+6
GA	34	30	35	+1
MI	31	35	34	+3
NV	31	37	33	+2
NC	32	35	34	+2
PA	36	24	40	+4
WI	30	36	33	+3

Numbers in red represent the lowest for the geography

	Independents Size			Independent Margin Trump - Democrat		
	2020	2024	Change	2020	2024	Change
National	27	34	+7	-13	-3	+10
AZ	39	38	-1	-9	+9	+18
GA	28	30	+2	-9	+11	+20
MI	23	35	+12	-6	-4	+2
NV	30	37	+7	-6	0	+6
NC	30	35	+5	-4	+4	+8
PA	19	24	+5	-8	+7	+15
WI	31	36	+5	-12	-1	+11

result is a major underperformance compared to Biden’s +13 with independents in 2020, which made up 76% of his popular vote margin.

In the key states, Trump improved among independents in all seven competitive states. In contrast to 2020, when he lost independents in all seven by margins of four or more, in this election he won them in four of the seven states, and was basically tied in two more. Additionally from 2020, there were double digit improvements in four states: Georgia (+20), Arizona (+18), Pennsylvania (+15), and Wisconsin (+11).

Ideology - The Country Moves to the Center

The ideological composition of the 2024 presidential electorate moved back toward the center. In 2020 conservative and moderates were even at 38% of the electorate each, while liberals were at 24%. In this election, moderates increased to 42%, while conservatives dropped to 35%, creating a +7 margin in favor of moderates. Liberals changed little coming in at 23%.

The key conclusion is that the electorate moved both to the political center through the increase in independents, and to the ideological center, with moderates becoming a larger portion of the electorate than conservatives.

Issues in the Campaign

In the exit poll, the two most important issues were “state of democracy” at 34%, and the economy at 31%. Abortion was a distant third at 14%, closely followed by immigration at 12%, and foreign policy fifth at 4%. The selection of these issues was generally party-driven, as a majority of Democrats (52%) chose democracy, and a majority of Republicans (52%) chose the economy. Democrats had abortion second at 23%, while Republicans had immigration second at 19%. Independents led with the state of democracy at 39%, with economy second at 28%.

Democracy

The Democrats’ emphasis on “democracy” did not necessarily benefit Harris and their candidates.

- 73% of the electorate said democracy was *threatened* rather than *secure* (25%), but among the voters who said democracy was threatened, Trump won by 2 (50-48).
- Those who said it was *very threatened* voted for Trump by 5 (52-47).
- Those that said democracy was *secure* voted for Trump by 1 (49-48)

Economy

The economy/inflation was a weakness for Democrats.

- The condition of the nation's economy was seen as negative: 31% excellent/good - 68% not so good/poor.
- An overwhelming 75% of the electorate said inflation had posed some level of hardship for them and their families. 22% said inflation had been a severe hardship; 53% said a moderate hardship; while 24% said there had been no hardship.
- Additionally, voters were asked who they trusted more to handle the economy Trump or Harris; Trump won 53-46.

In the Winston Group post election survey of 1,250 respondents who voted, economy/inflation was the top issue at 40%, with immigration a distant second at 12%, and abortion right behind at 11%. No other issue was in double digits.

In that survey, we asked voters which party they had more confidence in to handle the economy; Republicans were preferred 52-41, and on inflation, Republicans led 52-40. Among independents, the margins favoring Republicans on these two issues were similar.

Issue Handling (Republican Party-Democratic Party)	Overall	Indep
Economy	52-41	51-38
Inflation	52-40	49-36

The challenge that clearly emerged for Biden and Harris was that voters' view of the economy was much worse than in the last election. In the 2020 exit polls, 49% said the economy was excellent/good, while 50% said not so good/poor. In this election, it dropped to 31-68.

Biden's job approval reflected this as 40% approved of his handling of the Presidency, while 59% disapproved. Among independents, his job approval was 34% approve and 66% disapprove, reflecting the scale of his difficulty among the voter group that got him elected in 2020.

For Harris, the combination of Biden's terrible job approval, the very negative view of the economy, and her inability to articulate a clear policy direction distinct from Biden's current economic policy was an overwhelming problem.

What Voters Heard From Candidates

In our Winston Group post election survey, we asked voters to rank a series of 17 issues and news stories that impacted how they voted. The priority issues to the electorate were inflation/gas prices/grocery costs (7.22) and crime and safety (7.04). A second important tier of issues were health care/prescription drugs (6.82), threats to democracy (6.75), situation at the border (6.52) and the deficit (6.43). Abortion came in at the low end of the second tier at 6.13.

- Among independents, the top two priorities were inflation (6.98) and crime/safety (6.76). Similarly among Hispanics, the top two priority issues were inflation (7.61) and crime/safety (7.11).
- Women prioritized four issues in a top tier: inflation (7.30); crime/safety (7.14), health care/prescription drugs (7.10) and democracy (7.09). Abortion (6.59) along with the deficit (6.46) and the situation at the border (6.32) came in as important second tier issues.

Rank	News Stories (1-9 scale where 1= not important at all and 9= extremely important)	Overall	Indep	Hispanic	Women
1	Inflation/gas prices/grocery costs	7.22	6.98	7.61	7.30
2	Crime and safety	7.04	6.76	7.11	7.14
3	Health care and prescription drugs	6.82	6.44	6.56	7.10
4	Threats to democracy	6.75	6.58	6.63	7.09
5	Situation at the border of the US and Mexico	6.52	6.37	6.07	6.32
6	National deficit	6.43	6.16	6.46	6.46
7	Abortion	6.13	5.87	5.95	6.59
8	Conflict in Gaza/War between Israel and Hamas/Iran's attack on Israel	5.76	5.60	5.78	5.80
9	President Biden's economic agenda/Bidenomics	5.67	5.54	5.48	5.52
10	Climate change	5.46	5.51	5.05	5.40
11	Funding for foreign conflicts like Ukraine	5.45	5.30	5.66	5.78
12	Tariffs	5.44	5.19	5.21	5.59
13	Trump trials and conviction	5.07	4.87	5.31	5.30
14	January 6/Trump claims about the 2020 election	4.91	4.59	4.40	5.15
15	Cultural issues such as transgender individuals participating in women's sports	4.90	4.75	4.69	5.04
16	Project 2025	4.77	4.50	4.50	5.23
17	President Biden's recent comment about garbage	3.97	3.54	4.48	3.86

In terms of messaging, we asked what issue voters heard the most from the respective party candidates. The key difference was clearly the focus on the economy.

The post-election survey shows Democrats' messaging was focused on their base. The top two messages heard from Democrats were their base issues: abortion (30%) and threats to democracy (17%). Only 7% of voters heard an inflation message from Democrats with 8% hearing about January 6. On the issue of abortion, the Edison Exit poll asked which candidate they trusted more to handle the issue. Voters preferred Harris over Trump by the slim margin of 3 percent (49-46).

The top two messages heard most from Republicans were the situation at the border (30%) and inflation/gas/grocery costs (20%). The Republican message topics came closer to reflecting concerns of the electorate, in contrast to the base focus of Democratic messaging.

Party	Issue/Story % Heard	Issue/Story	News Stories (Rank out of 17)			
			Overall	Indep	Hispanic	Women
Republican	30%	Situation at the border of the US and Mexico	5	5	6	7
	20%	Inflation/gas prices/grocery costs	1	1	1	1
Democratic	30%	Abortion	7	7	7	5
	17%	Threats to democracy	4	3	3	4

Late Deciders

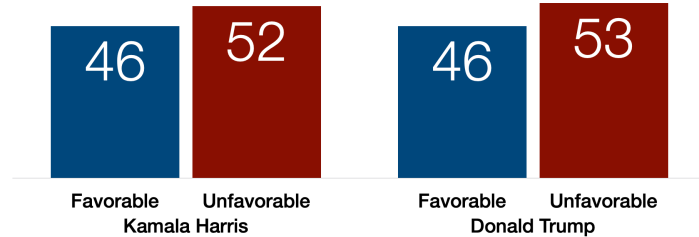
Late deciders broke for Trump. Among those who decided in the last week (7% of the electorate), they broke for Trump by 9 points (51-42).

Brand Images/Candidate Attributes

The 2024 election looked more like 2016 than 2020.

Exit polls showed the brand images for both candidates were negative, with 46% of the electorate having a favorable view of Harris and 52% having an unfavorable view. Trump was basically the same at 46-53. As a comparison, the 2016 election saw both party frontrunners with negative brand images: Clinton (43-55); Trump (38-60).

Brand Images of Harris/Trump



In 2020, Biden had a brand advantage over Trump with a favorable image 52-46 compared to Trump's 46-52. This made it easier for voters who did not like Trump to vote for Biden. This was particularly true among independents as Biden's brand image with this group was 51-45, while Trump's was a very poor 40-58. This led to Biden's huge margin among independents.

Trump's poor brand image with independents continued in this election as it remained about the same as 2020, 40-59. However, Harris struggled with them in contrast to Biden. 45% had a favorable view, while 54% had an unfavorable one. This played an important role in independents moving from a 13-point advantage for Biden to a 3-point advantage for Harris. This was compounded by independents increasing their portion of the presidential electorate from 27% to 34%.

Finally, in this election, 8% of the electorate was unfavorable to both candidates; they broke for Trump 52-32.

Voter Groups

The economy, the view of what the candidates were (or were not) saying, and the electorate's attitudes toward the candidates led to critical outcomes among several key groups.

Generally, Harris underperformed across the board. This is perhaps seen best at a geographic level. As examples (through November 30), Biden won New York with 61%; Harris is currently winning at 56%. In New Jersey, Biden won with 57% of the state; she is currently winning at 52%. In California, Biden won with 63%, and Harris is currently at 59%. These are not huge shifts, but do reflect an underperformance.

Independents

As reviewed earlier, after supporting Biden by 13 in 2020, they are currently supporting Harris by only a 3 point margin. This voter group has expanded significantly as it went from 27% of the electorate to 34% of the electorate.

Hispanics/Black

Republicans made significant inroads with Hispanic voters with Trump winning 46% of this voter group. This is an improvement from the performances in 2016 (28%) and 2020 (32%).

Much of this improvement seems to have come from Hispanic men, 54% of whom voted for Trump (54-44). In contrast, 58% of Hispanic women voted for Harris (39-58). In 2020, 36% of Hispanic men voted for Trump, while in 2016, it was 32%.

This is different than the vote among black voters that showed relative consistency from 2020. But there had been a slight improvement going from 2016 to 2020. In 2016, Trump won 8% of black voters, and improved to 12% in 2020 and remained at that level with 13% in 2024. This improvement came primarily from Black men as they went from 13-82 in 2016 to 19-79 in 2020. In this election there was a very slight improvement among them going to 21-77.

Women

Despite Democrats' campaign emphasis on abortion and having a female nominee, Harris won women only by 8 points. In fact, Harris' margin among women is significantly smaller than Biden's 2020 margin among women (+15) as well as Hillary Clinton's in 2016 (+13). While Harris improved slightly among white women — going from Biden's 44-55 margin to her 46-53 result, Hispanic women moved toward Trump. In 2020, they voted for Biden by a 69-30 margin, and in 2024 they voted for Harris by the smaller margin of 58-39. Overall, the top issue for women was democracy at 33%, closely followed by the economy at 29%, and then abortion at 19%.

Income

There was a key change based on income, as voters making under \$100,000 went from supporting Biden in 2020 by 13 (56-43) to supporting Trump in 2024 by 4 (51-47). These voters represented 59% of the electorate. Those making over \$100,000 went the other direction as they had supported Trump in 2020 by 12 (54-42), in 2024 they supported Harris by 4 (51-47).

Conclusion

Republicans won the political trifecta — the Presidency and majorities in the Senate and House of Representatives. Additionally, Trump won the popular vote, only the second time for a Republican over the last nine presidential elections. He was helped in this by a presidential Republican party ID advantage of +4, the largest 1984 forward.

But the big question that emerges from this election is what happened to the Democratic Party? In the last 10 Presidential elections, the Democrats made up the largest portion of the electorate in terms of party identification (being even at 37% with Republicans for first in 2004). In this election, not only was that streak broken, but Democrats fell behind independents as well - into third place.

The clear question from this election is — where did those Democrats go? There are two possibilities. First, they just didn't show up to vote while independent turnout increased significantly. This theory would contradict the public survey data done prior to the election that said Democrats were very motivated to vote, while independents were not. The other is that many Democrats changed their party identification to independent. Either way, it shows an electorate that moved away from Democrats as a result of Biden policies and voted for change. Democrats

will need to think through how to bring voters back, which is very different than forming the next version of opposition.

The election was a positive outcome for Trump and the GOP, but the presidential race was still close. Over the last 14 presidential races, only one had a closer popular vote margin than this: Bush in 2000. This election was a rejection of the last four years and a strong willingness to listen to new policy approaches. That is a significant opportunity and positive starting point for the incoming Trump administration and Republicans as they focus on the issues that matter to the electorate, but they must deliver on the economy.