MAPPING THE FUTURE: THE AMERICAN POLITICAL LANDSCAPE AND THE ROAD TO 2024

LORD ASHCROFT KCMG PC
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Lord Ashcroft Polls

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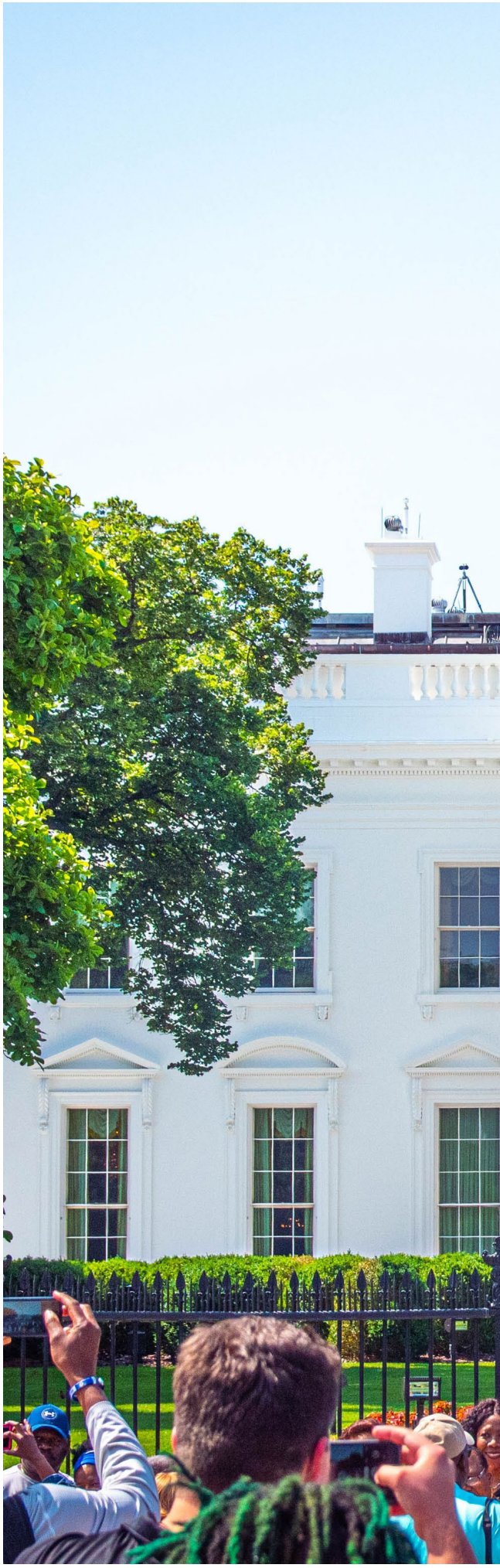


INTRODUCTION

This report brings together research I conducted during the campaign for the November 2022 elections, but its implications go beyond a single set of midterms. The model that we use, and the findings reported here – based on a poll of 20,000 Americans and extensive focus groups in the key states of Pennsylvania, Georgia, Florida and Arizona – help us understand the landscape of opinion in the United States, the divisions that continue to define American politics, and the forces that will be at work in the run-up to the 2024 presidential election and beyond.

The research also helps explain why the red wave scheduled for November never materialised, despite economic pain and voters' clear view that the country was heading in the wrong direction, with the Biden administration's policies making things worse rather than better. Our analysis shows that we saw, in effect, one midterm but two elections, with different parts of the electorate voting according to completely separate sets of perspectives and priorities. Meanwhile, as the exit polls confirmed, nearly as many voters treated the election as a referendum on the former president as on the incumbent – hence the result that seemed to defy political gravity.

The temptation for the Democrats will be to take the result as an endorsement. Our findings suggest this would be a mistake. Relieved though many moderate voters were to see the end of the Trump term, few are very impressed with the administration's record or agenda, and many doubt that President Biden is up to the job today, let alone a second term.

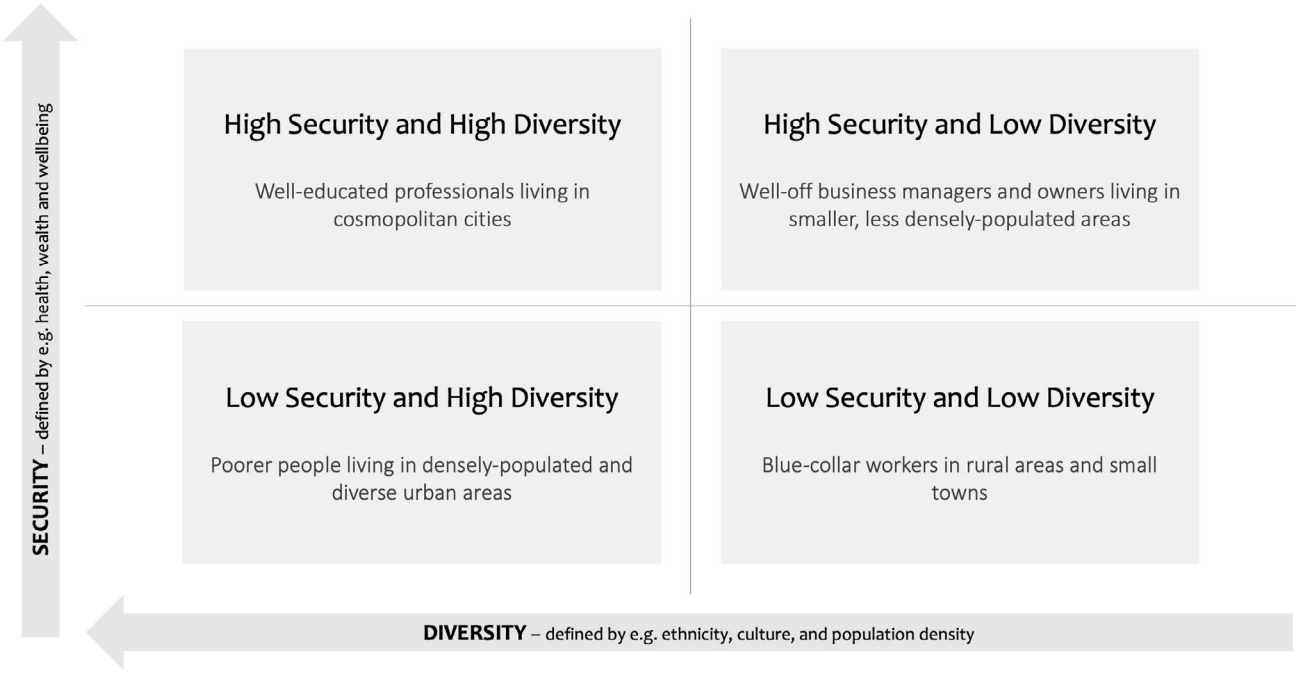
For the GOP, the result has brought some questions into sharper focus. Congressional candidates found that Donald Trump's endorsement was far from the magic touch some had hoped. Voters had their own view of the contenders' qualities, especially those loudly denying the results of the 2020 election. Another lesson is that the overturning of Roe v. Wade could continue to be a problem for the party: though the issue is in the hands of the states, many potential Republicans are uneasy about wide disparities in the law between different parts of the country – another factor contributing to the midterm result. And while there is little appetite for re-amplifying the rancour of recent years, there is demand for an alternative to the policies and values currently on offer from the Democrats – and even more so if a more radical ticket emerges to supplant Biden and Harris.

Who is best placed to present such an alternative will be the subject of spirited debate. As is clear from this research, turning the page on Trump – if that is what the party decides to do – cannot mean turning the page on his supporters. He was a symptom and an accelerant of the tensions we see today, not their cause, and he won by giving a voice to large numbers of voters. The job of his successor will be to pull off the same trick.

Lord Ashcroft KCMG PC
January 2023

THE US: A DEMOGRAPHIC AND POLITICAL MAP

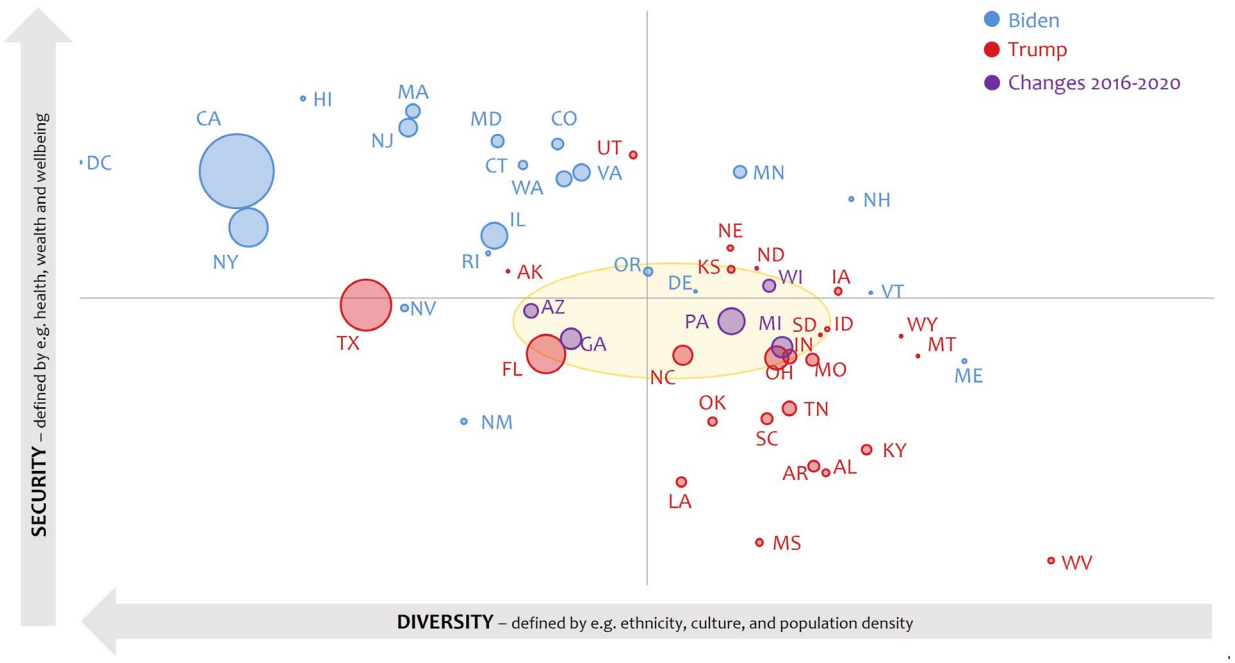
DEMOGRAPHIC MAP



Much has been written about the division and polarisation that has long characterised American politics. In this analysis we use a model designed to help understand these forces, and the landscape of opinion in the United States. Our model maps the electorate according to voters' security on one hand, and the diversity of their communities on the other.

The vertical axis represents Security, which includes measures like income, house value, education and health: the higher up the axis, the more secure. The horizontal axis represents Diversity, including factors like ethnicity, population density, urbanity and marital status: the further to the left on this axis, the more diverse the community. All of these are derived from census data.

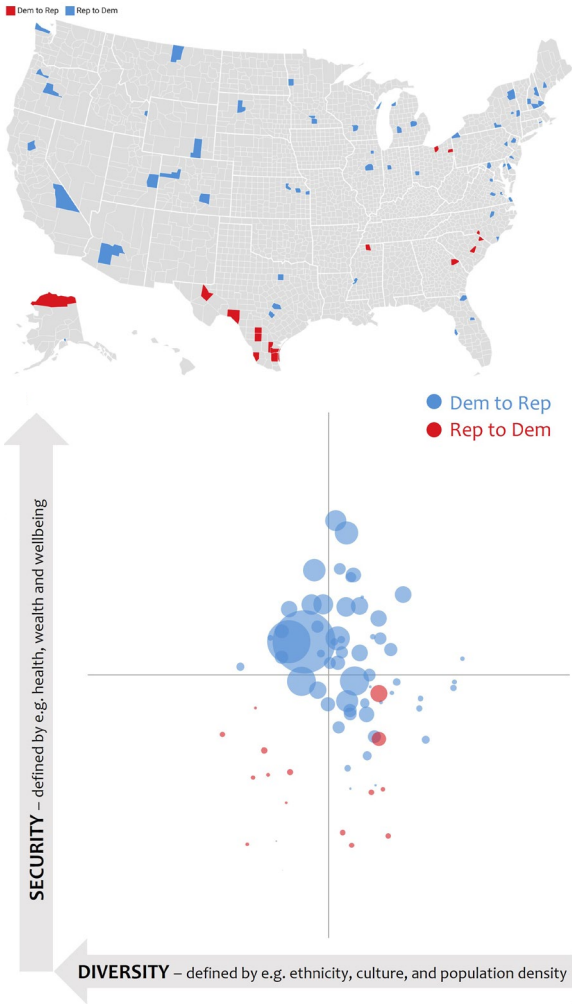
This means we have four quadrants of above and below average levels of Security and Diversity onto which we can map people, neighbourhoods, counties, Congressional districts and states.



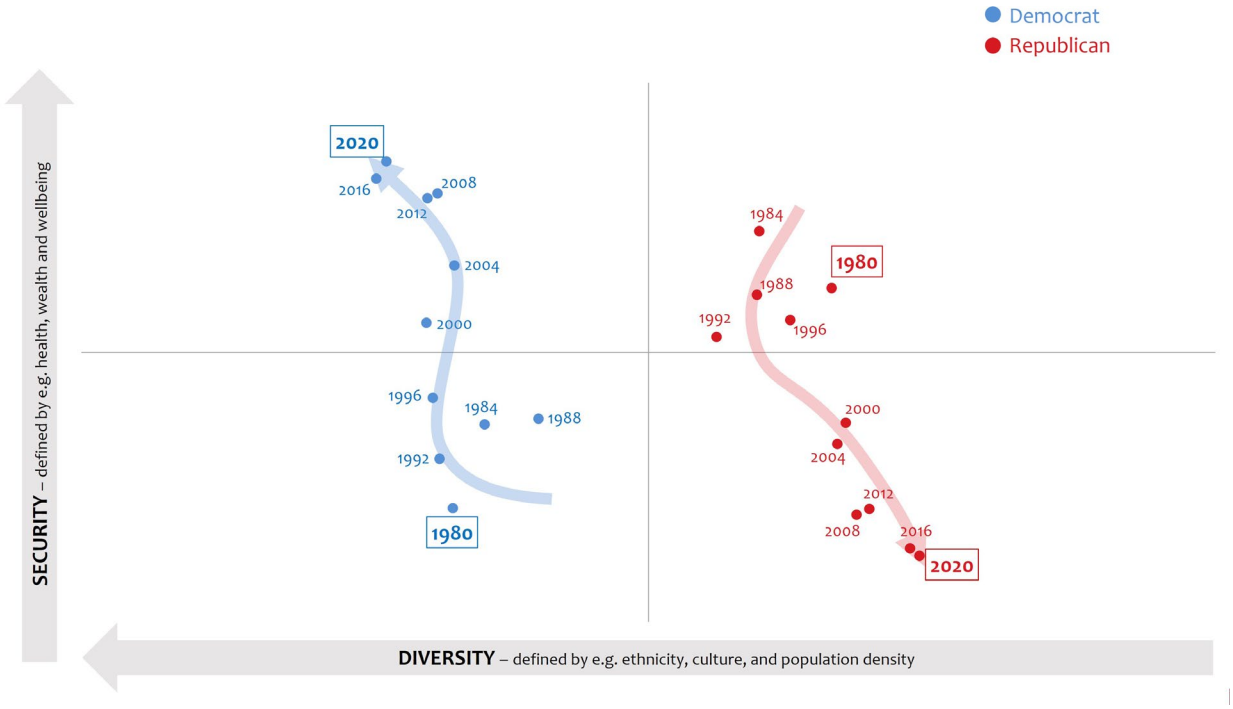
This is where the 50 states sit on that map, and **how they voted in the 2020 presidential election**. The Democrats clearly dominate the high-security, high-diversity top-left quadrant, while the Republicans do better in the lower-security, lower-diversity bottom right. It is no coincidence that the battleground states – including those that changed hands in 2020, and those where we saw the most fiercely contested battles in the 2022 midterms – sit close to the fault line between the two.

Here we see the **counties that switched in 2020,** both on the physical map and in our model. We can see the inroads that the Biden campaign managed to make into territory the Republicans would traditionally have considered their own – the large bubble close to the centre, for example, represents Maricopa County in Phoenix, and we see blue gains creeping into the more prosperous, less diverse top right quadrant of the map. The few Republican gains were confined to the less well-off bottom half of the map. Overall, we see a continuation of a political and cultural divide that runs through the United States from the top right to the bottom left.

COUNTIES CHANGING HANDS IN 2020



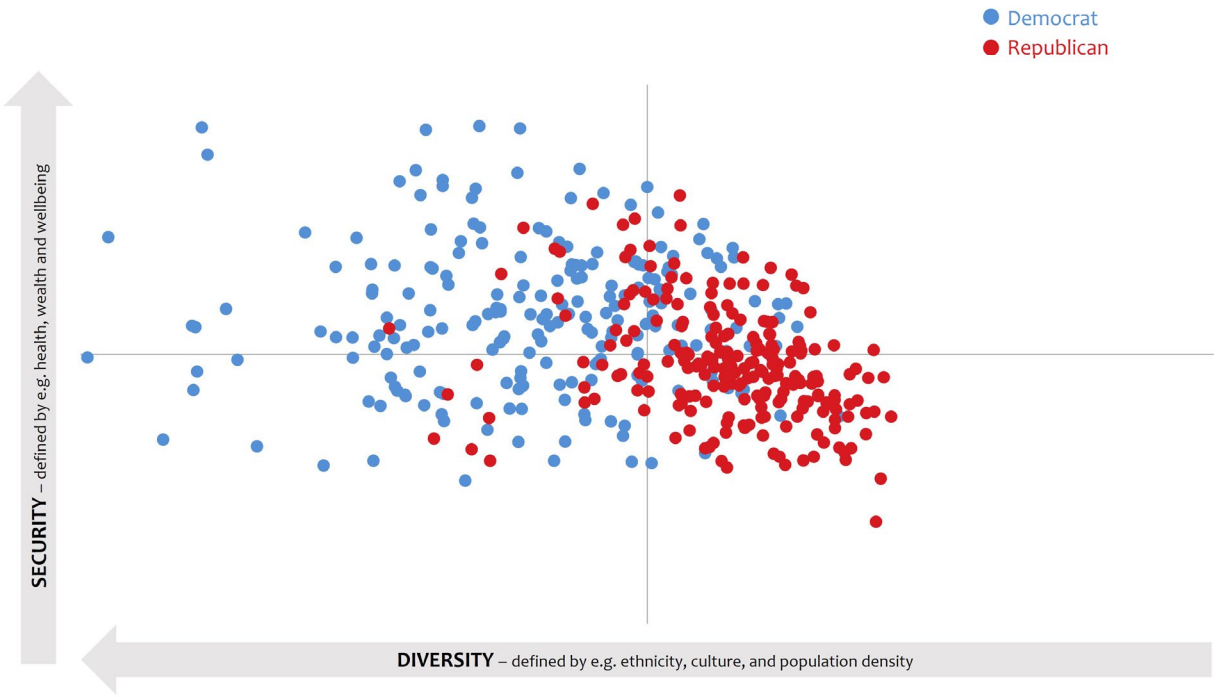
EVOLUTION OF THE REPUBLICAN AND DEMOCRAT VOTE



The dividing line in the American electorate has not remained fixed but has moved significantly over the last 40 years. This shows the **evolution of the Republican and Democrat vote** from 1980 to 2020. It's not a straight line, but the trend is very clear. In the Reagan era, Republican support was centred squarely in the top right quadrant of the map, among 'high security, low diversity' voters. Over time, this has drifted down to the bottom right, as the GOP's centre of gravity has shifted to less prosperous rural and small-town America. On the other side, the opposite has happened. While always being rooted in more diverse populations, in economic terms the Democratic vote has grown steadily more upscale.

THE DIVIDING LINE IN THE AMERICAN ELECTORATE HAS NOT REMAINED FIXED BUT HAS MOVED SIGNIFICANTLY OVER THE LAST 40 YEARS.

CONGRESSIONAL SEATS



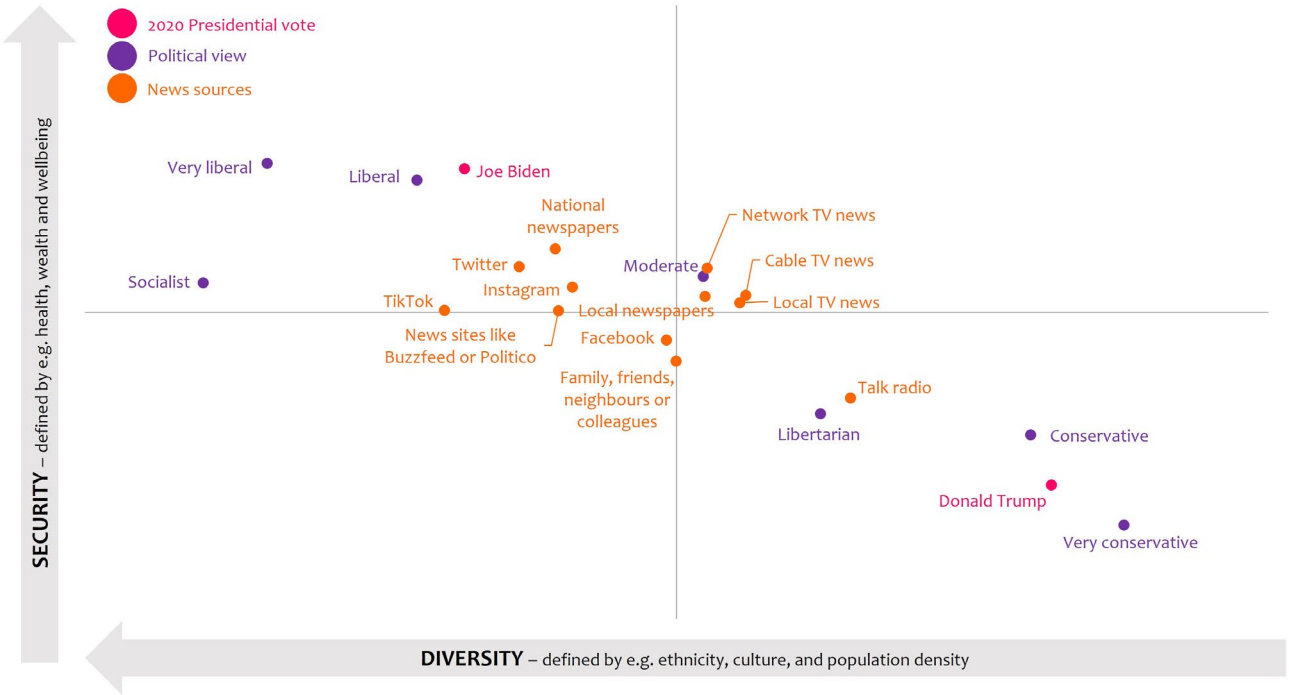
Mapping the **435 districts of the House of Representatives** following the 2022 Congressional elections, we see the same patterns: the more urban and diverse the community and the more secure its voters, the more likely the district is to be held by a Democrat. It is notable that the more liberal districts are further from the centre – less representative of the country as a whole – than the most conservative ones.

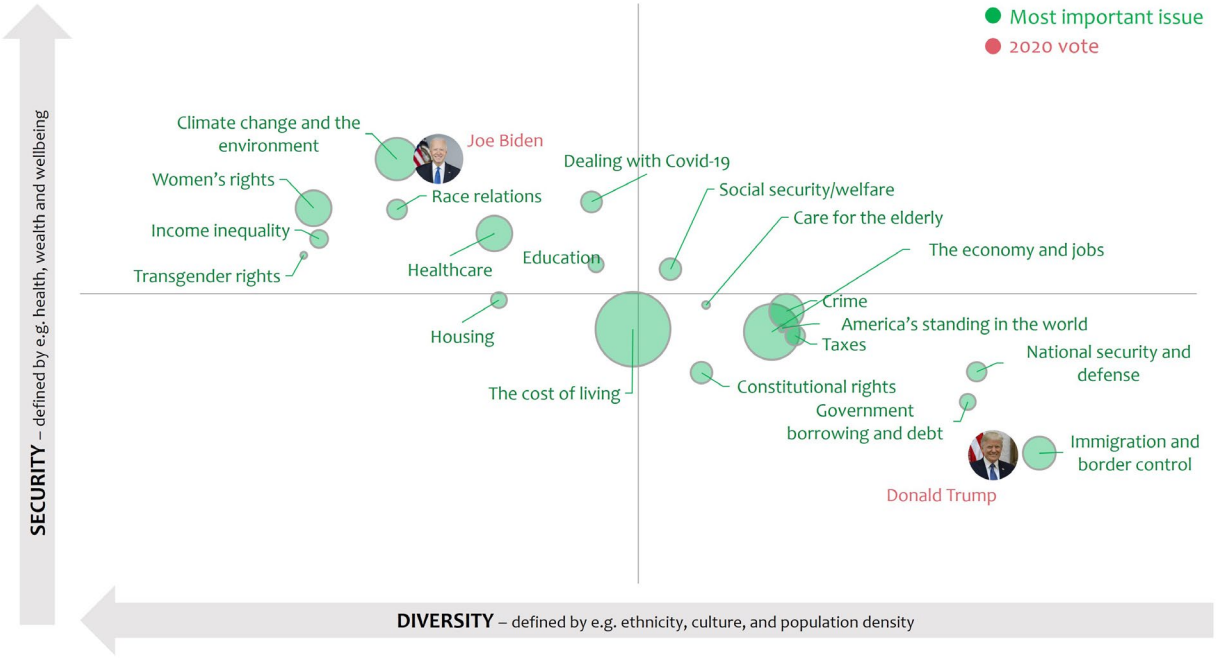
THE MORE URBAN AND DIVERSE THE COMMUNITY AND THE MORE SECURE ITS VOTERS, THE MORE LIKELY THE DISTRICT IS TO BE HELD BY A DEMOCRAT.

MAPPING POLITICAL AND CULTURAL ATTITUDES

We can use the same model to map the distribution of opinions as given by participants in our 20,000-sample survey. Asking people how they describe their **political outlook,** we find conservatives most likely to be found in the less diverse, less secure bottom right, with liberals in the opposite corner. It is striking that those describing themselves as socialists are most prevalent in better-off communities, not in the poorer bottom half of the map.

The pattern of **news sources** is also instructive. Local newspapers, network TV news, Facebook and word of mouth are all close to the centre of the map, showing that they are more likely to be shared across demographic and political groups. However, those who name talk radio as one of their main news sources are most likely to be found in the bottom right, while those getting much of their news from national newspapers (like the New York Times or Washington Post), Twitter, TikTok, Buzzfeed or Politico are more likely to appear in better-off liberal territory.



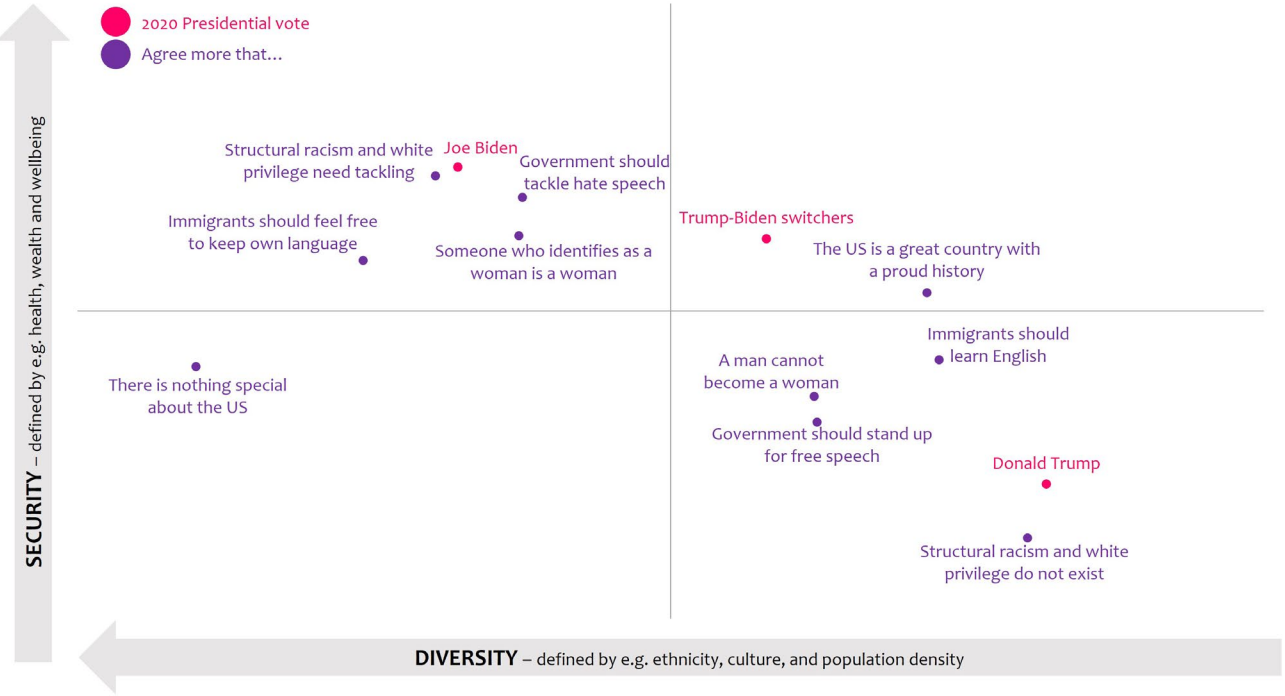


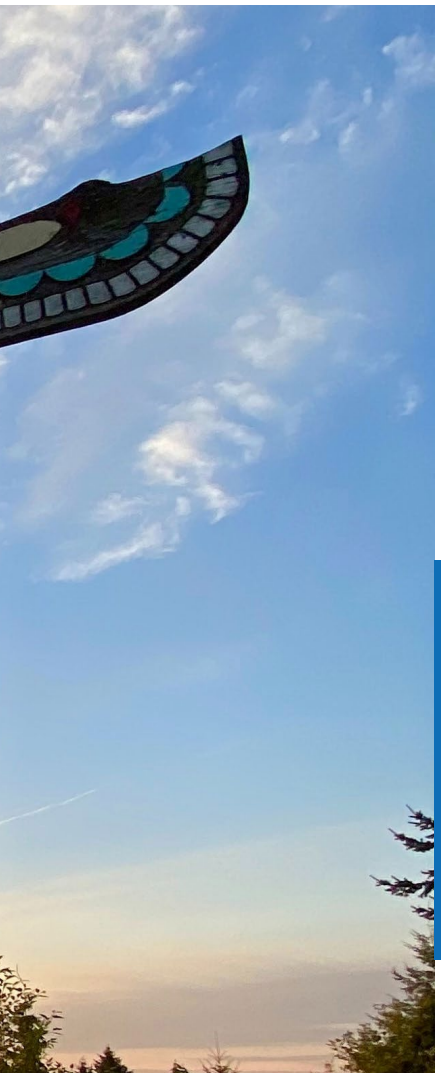
We asked our respondents what they considered the **most important issues** facing the country. By mapping their responses we can see that the cost of living is not only by far the biggest concern for voters, but that it is shared across all demographic groups and transcends political divisions. In our focus groups, people did not tend to blame the government directly for rising prices, instead seeing them as a result of the war in Ukraine, the covid lockdowns, government stimulus programmes, long-term quantitative easing, or a combination of these factors. However, they sometimes thought the government seemed oblivious to the problem, as with Biden's claim that there had been "zero inflation" in July. Many also thought the government could do more to help, perhaps by putting pressure on corporations which were using cost increases as an "excuse" to raise prices despite making record profits. Some also felt the government was adding to the problem, or at least failing to do what it could to alleviate it, by obstructing domestic energy production, for example by shutting down the Keystone pipeline. This was reflected in the midterm exit polls (National Election Pool/ Edison), which found 47% saying their family's financial situation was worse than two years ago compared to 19% saying it was better, and 47% saying Biden's policies were mostly hurting the country, compared to 33% saying they were mostly helping.

Looking elsewhere on the map, it is not necessarily the case that people in the top left, most liberal quarter of the population are the only ones to care about climate change, race relations or transgender rights. However, it is the case that these voters are more likely to put those things at the top of their priority lists.

Meanwhile, national security and especially immigration and border control are bigger concerns among low-security voters of the conservative bottom right than among the prosperous liberal territory in the opposite corner. Our Florida focus groups coincided with the Governor's decision to send a number of migrants to Martha's Vineyard. The action was certainly controversial, but it highlighted what was evidently an important concern. Nobody thought the situation at the border had improved under the stewardship of Biden (or Vice President Harris), and some strongly supported the gesture as a way of highlighting the problem for border and southern coastal states, and of exposing what they regarded as liberal complacency elsewhere in the country. One man of central American descent told us, "I'm kind of for it. If they want to be sanctuary states, let them put their money where their mouth is."

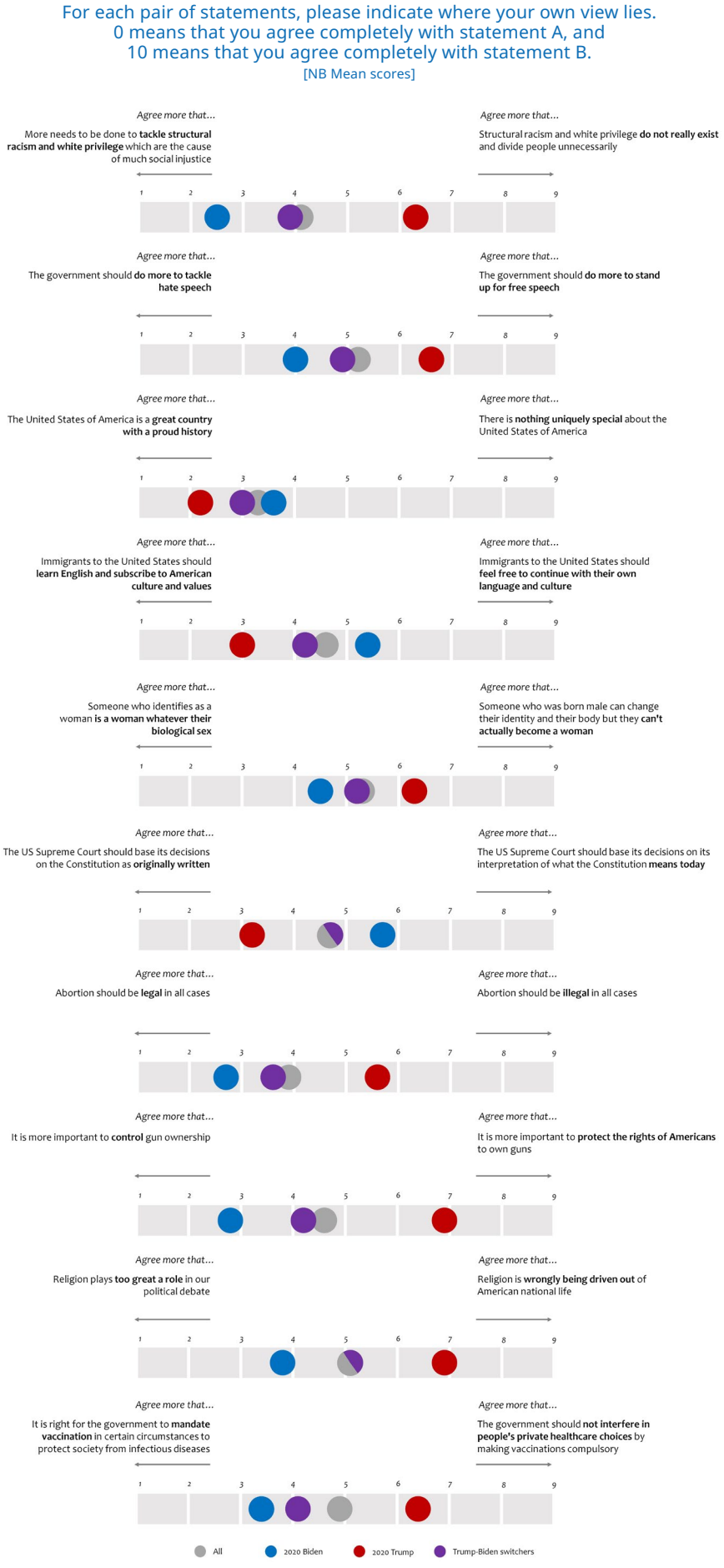
NATIONAL SECURITY AND ESPECIALLY IMMIGRATION AND BORDER CONTROL ARE BIGGER CONCERNS AMONG LOW-SECURITY VOTERS THAN AMONG THE PROSPEROUS LIBERAL TERRITORY



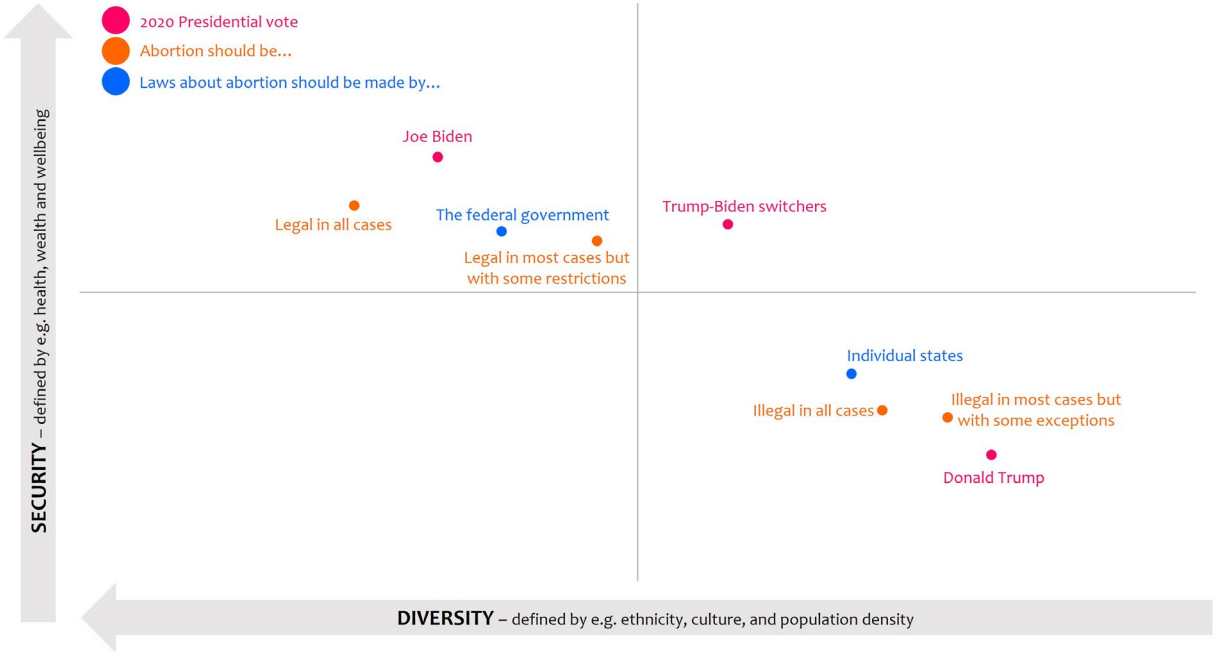


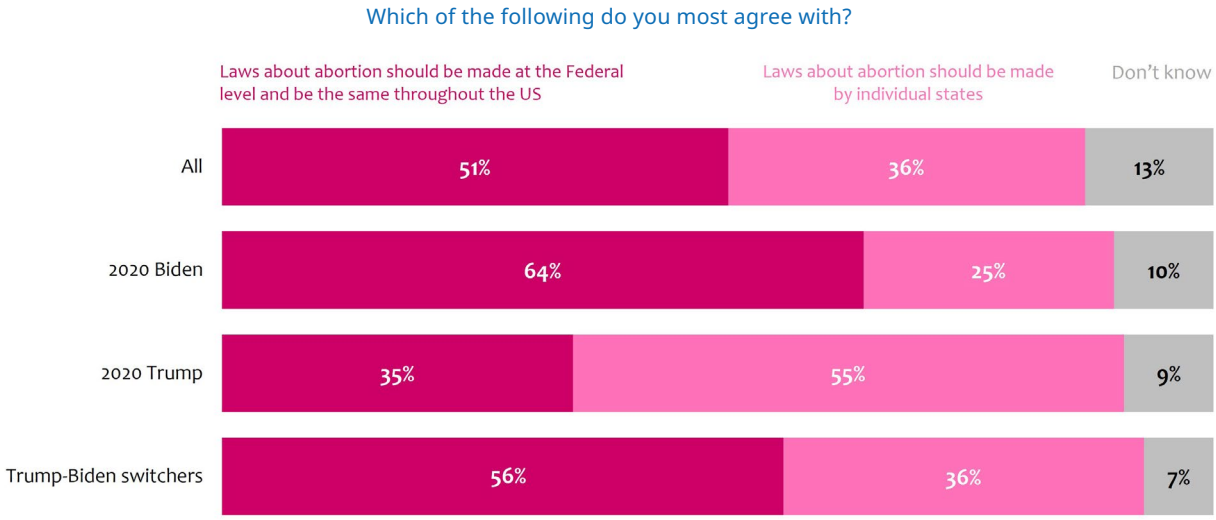
Given the distribution of votes and political attitudes, it is no surprise to see how views divide on some of the current questions of **culture and identity.** Those who are concerned about structural racism and white privilege who think the government should prioritise tackling hate speech over standing up for free speech, and who believe that anyone who identifies as a woman is a woman are to be found in the liberal top-left quadrant, while those who resist those ideas are most heavily concentrated in the Trump-voting bottom right.

PEOPLE'S VIEWS ABOUT ECONOMIC QUESTIONS ARE LARGELY DETERMINED BY THEIR CULTURAL OUTLOOK



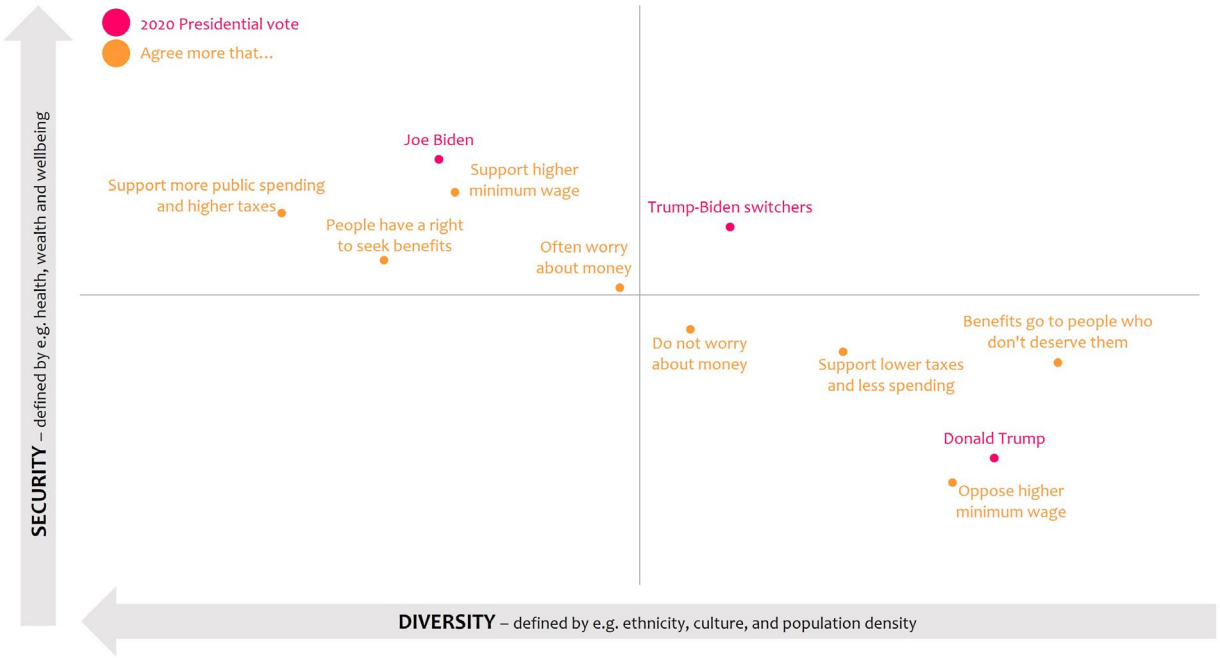
Our polling shows how opinion on some of the most **contentious issues** varies between different kinds of voters. Opinion is more polarised on structural racism and white privilege, and on gun ownership, than it is over gender and biological sex or whether or not the US is a great country with a proud history. Following the Supreme Court's overturning of Roe v. Wade, it is clear that most Americans want abortion to remain legal (albeit to varying degrees), and that Republican voters as a whole do not take an absolutist view on the issue.





A clear majority of both Republican and Democrat voters say either that abortion should be mostly legal with some restrictions, or mostly illegal with some exceptions. We also found a significant minority of 2020 Trump voters saying that laws about the issue should be made at a federal level and be the same throughout the US.

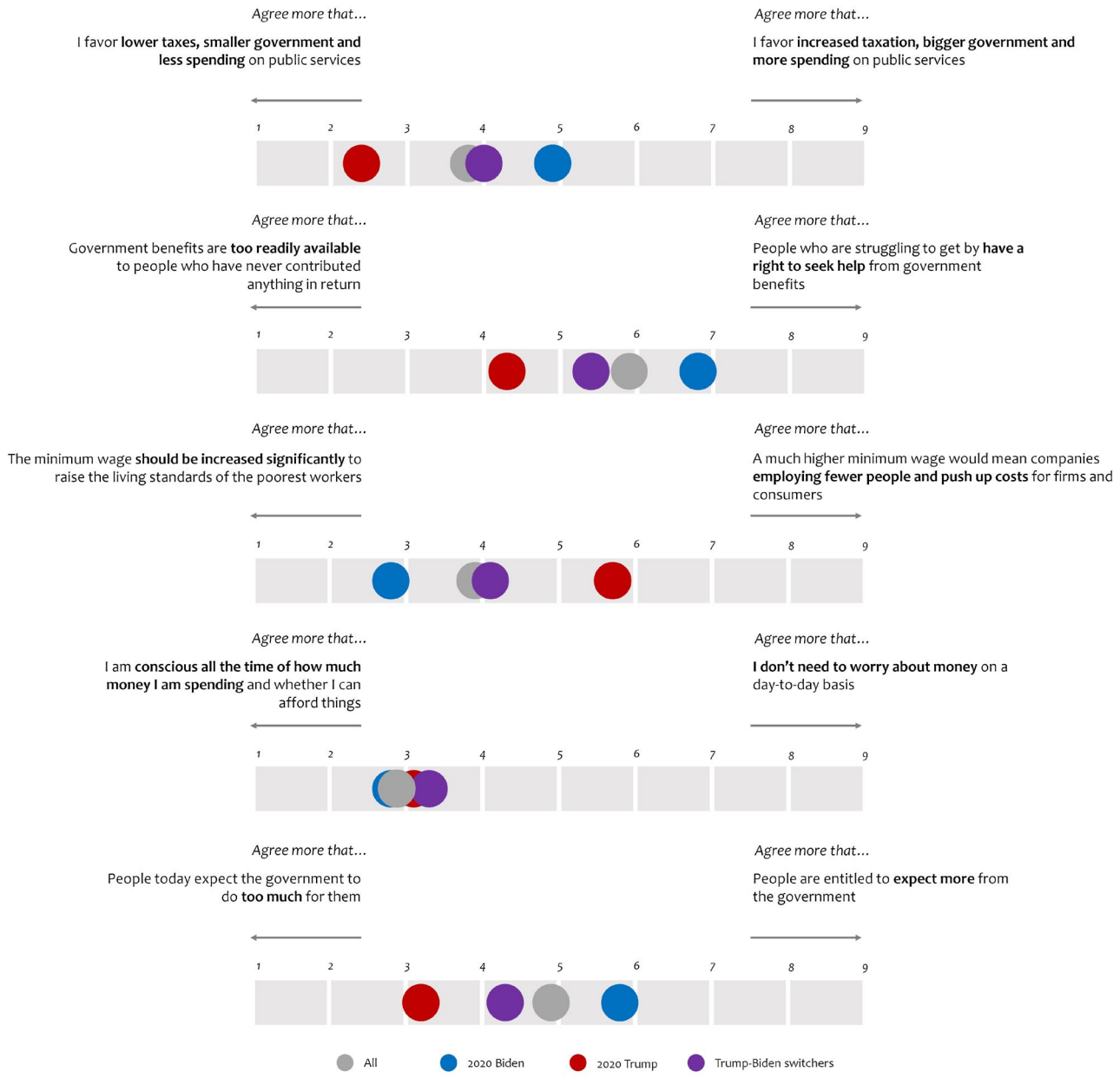
This was also reflected in our focus groups, in which it was clear that the issue had galvanised Democrats and helped push moderate voters – not just women – towards pro-choice candidates. Republicans' opinion was often nuanced. Many agreed with the ruling that abortion rights are not guaranteed by the Constitution, but at the same time worried about what they saw as extreme restrictions proposed by some red states, and the idea that the law on an issue like this should vary so widely between different parts of the country. Uncommitted voters told us they would look more carefully at candidates' views on the question. As with covid, the implications of the Supreme Court ruling have given many voters a new appreciation of the power held by their local politicians.



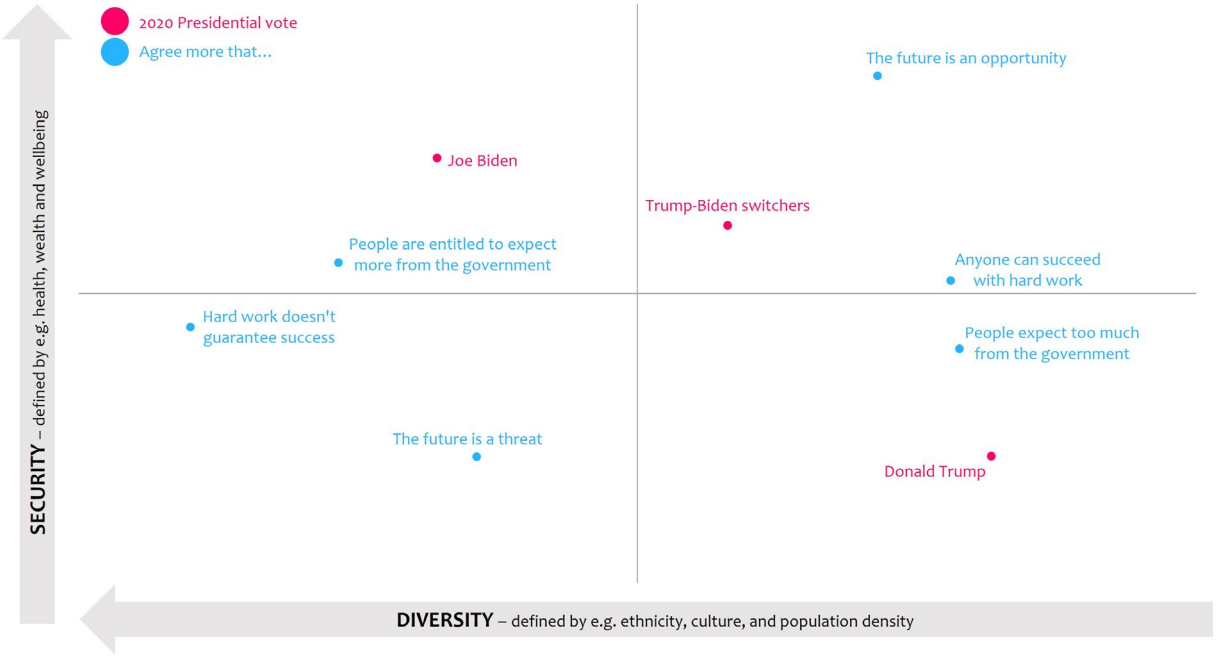
The spread of **attitudes to economic issues** is perhaps more surprising. It is striking that support for welfare benefits, more government spending and a higher minimum wage are most concentrated in the more prosperous top-left. Scepticism about all these things is most likely to be found among those who might be expected to benefit from them. This suggests that not only are political views are determined more by culture than economics, but people's views about economic questions are themselves largely determined by their cultural outlook.

Though opinion varies between supporters of different parties, the overall preference was towards lower taxes and government spending rather than higher. Voters overall tended to favour a higher minimum wage and to defend access to government benefits, though again to varying degrees. However, all voting groups agreed similarly and strongly that they were conscious all the time of how much they were spending and whether or not they could afford things.

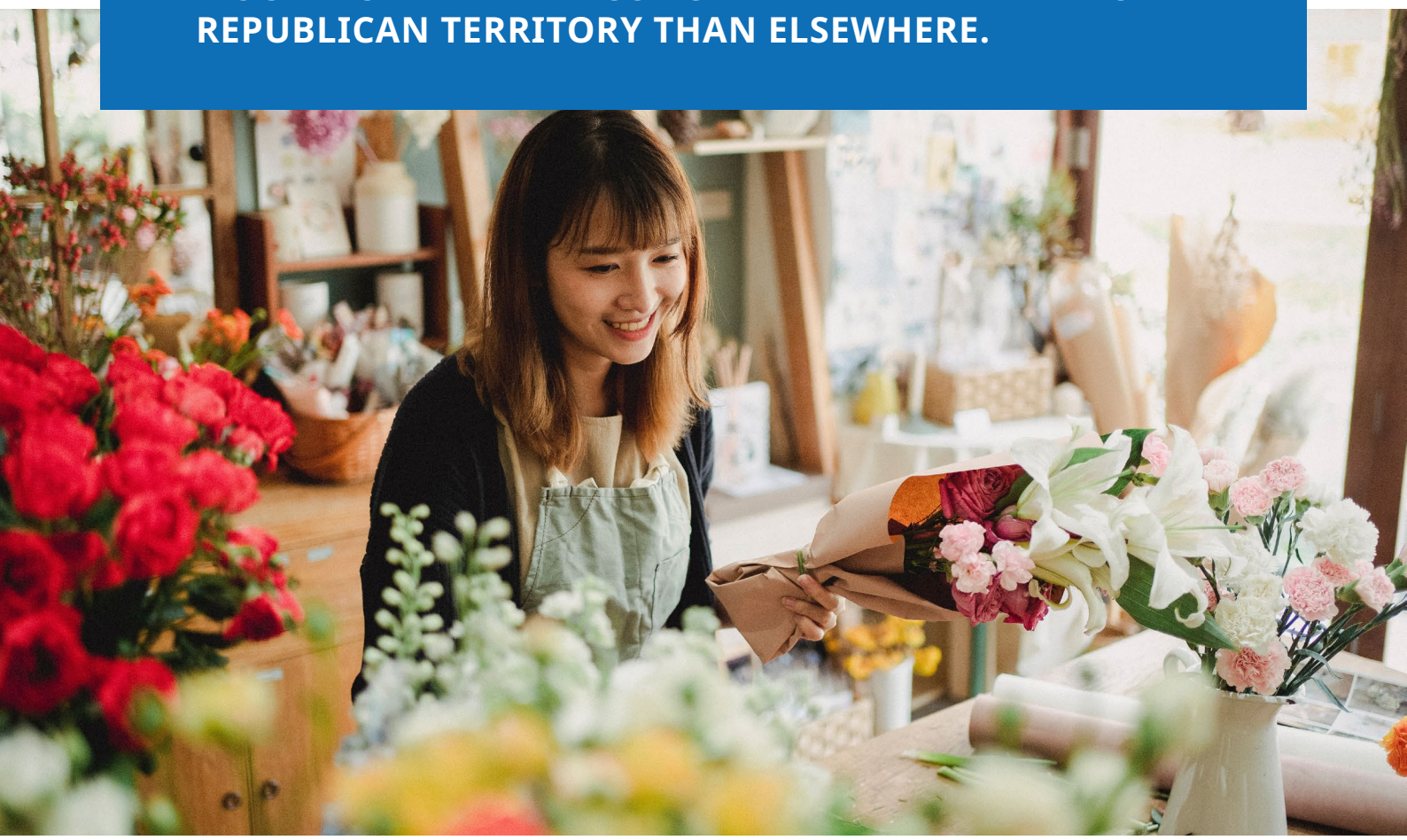
For each pair of statements, please indicate where your own view lies.
0 means that you agree completely with statement A, and
10 means that you agree completely with statement B.
[NB Mean scores]



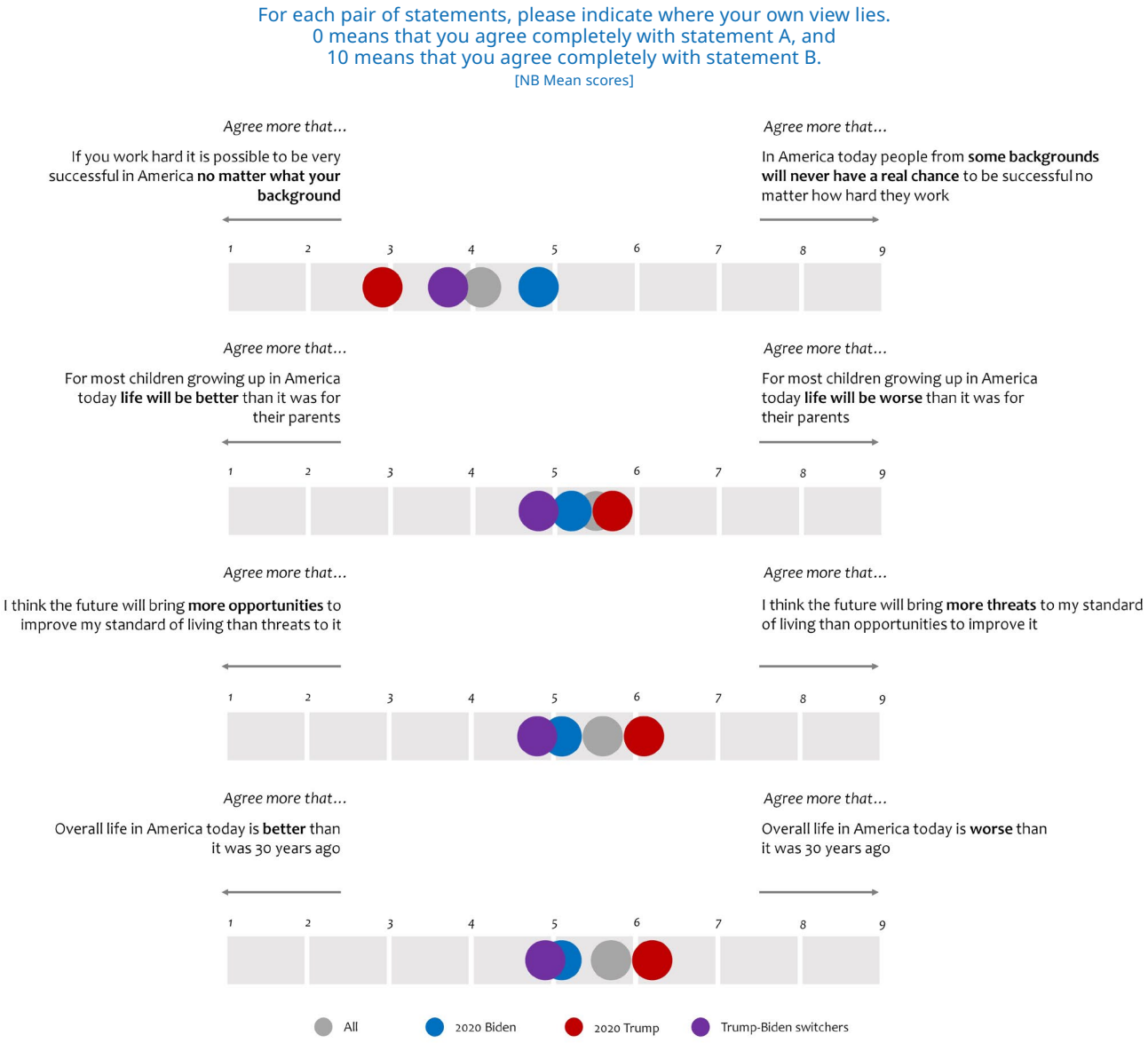
ALL VOTING GROUPS AGREED SIMILARLY AND STRONGLY THAT THEY WERE CONSCIOUS ALL THE TIME OF HOW MUCH THEY WERE SPENDING AND WHETHER OR NOT THEY COULD AFFORD THINGS.

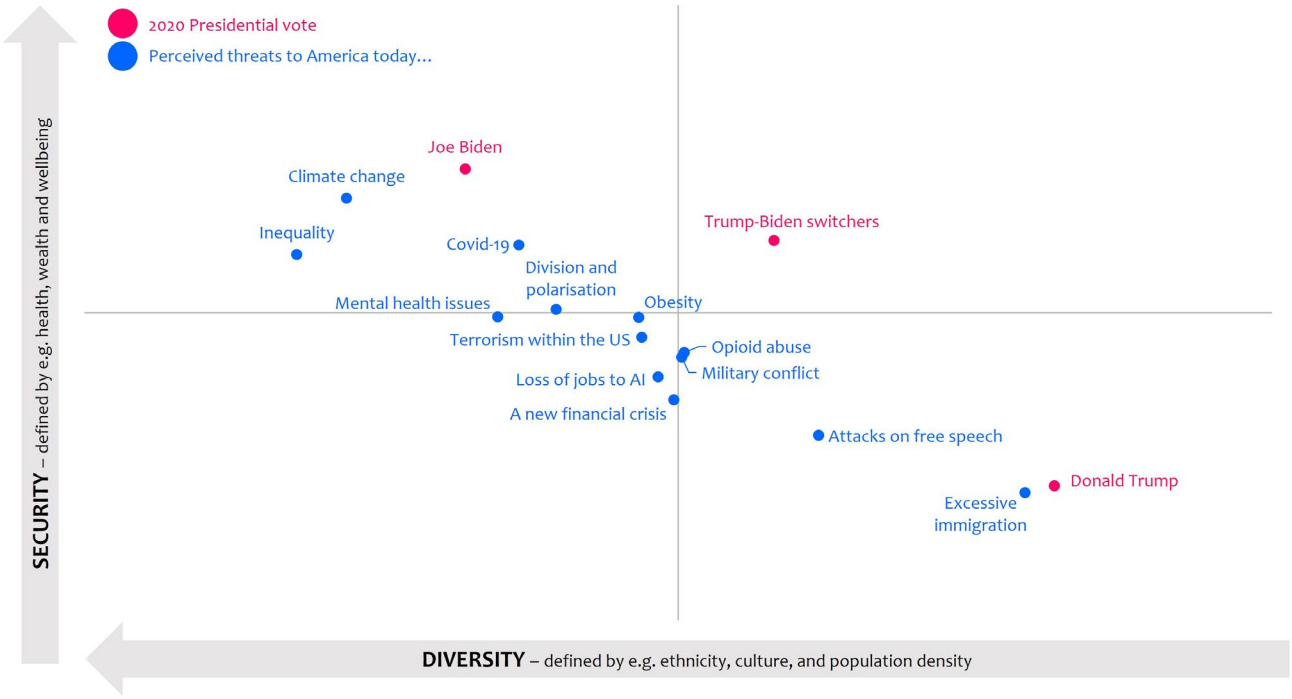


THE IDEA THAT IF YOU WORK HARD IT IS POSSIBLE TO BE VERY SUCCESSFUL IN AMERICA NO MATTER WHAT YOUR BACKGROUND IS STILL WIDELY BELIEVED, BUT MUCH MORE HEAVILY CONCENTRATED IN TRADITIONAL REPUBLICAN TERRITORY THAN ELSEWHERE.



When it comes to opinions about **opportunity and success** in the US, we see that people in the less prosperous bottom-right quadrant are the most likely to think that people expect too much from the government, with their opposite numbers in liberal territory feeling that government should do more. The idea that if you work hard it is possible to be very successful in America no matter what your background is still widely believed, but much more heavily concentrated in traditional Republican territory than elsewhere. The view that people from some backgrounds will never have a real chance to succeed no matter how hard they work was most prevalent among more diverse and less well-off voters, and was the majority view among those who voted for Bernie Sanders and Elizabeth Warren in the 2020 Democratic primaries. It was also by a slim margin the majority view of all voters aged 18 to 24.





CLIMATE CHANGE, BY FAR THE BIGGEST THREAT ACCORDING TO 2020 BIDEN VOTERS, DO NOT APPEAR AMONG THE TOP SIX WORRIES OF THOSE WHO VOTED FOR TRUMP – FOR WHOM THE RISK OF A NEW FINANCIAL CRISIS, EXCESSIVE IMMIGRATION AND ATTACKS ON FREE SPEECH ARE BIGGER CONCERNS.

There were striking differences between voter groups as to the **biggest threats facing America.** Climate change, by far the biggest threat according to 2020 Biden voters, do not appear among the top six worries of those who voted for Trump – for whom the risk of a new financial crisis, excessive immigration and attacks on free speech are bigger concerns. Those who worry about inequality and polarisation in society are also most likely to be found in the liberal-leaning top left quadrant.

How serious a threat is each of the following to America today, where 0 means it is not a threat at all and 100 means it is an extremely serious threat?
[NB Mean scores]

BIGGEST PERCEIVED THREATS FACING AMERICA

All voters

The risk of a new economic and financial crisis	77.2
Mental health issues	75.0
Opioid abuse	71.4
Division and polarisation in American society	70.7
Terrorism within the United States	69.7
Climate change	68.0

2020 Biden voters

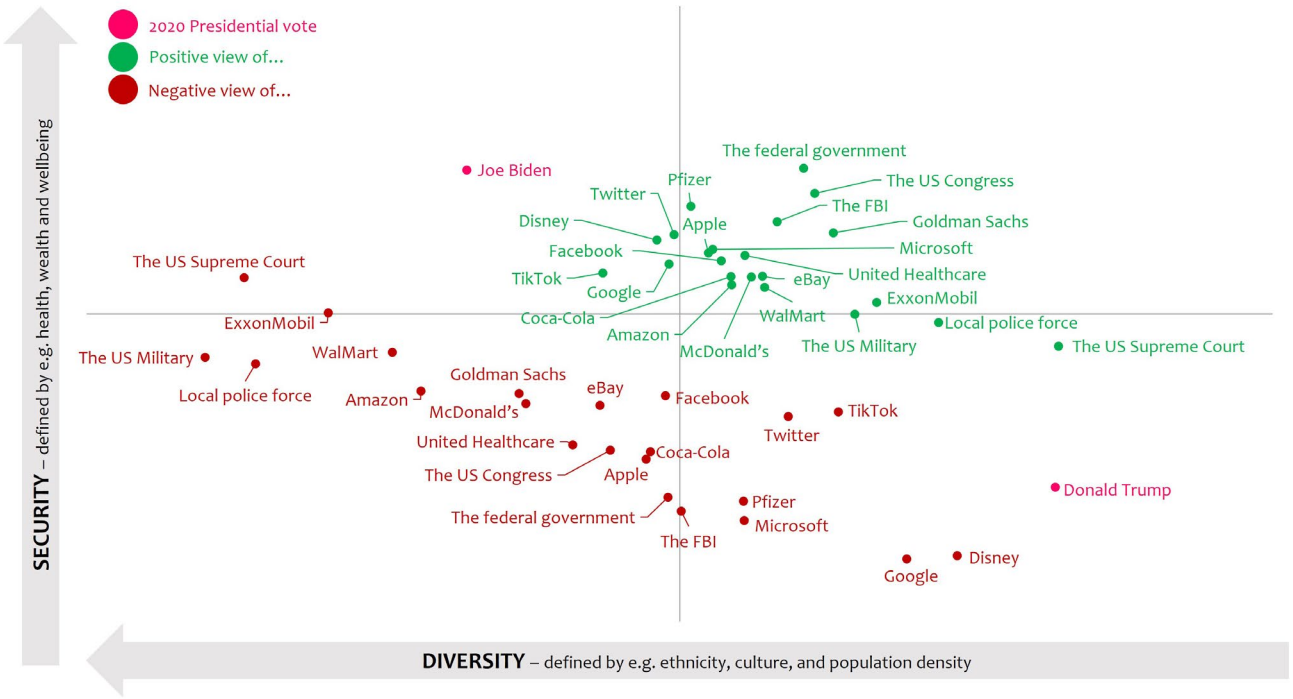
Climate change	82.9
Mental health issues	77.7
Inequality in American society	76.9
The risk of a new economic and financial crisis	75.8
Division and polarisation in American society	75.7
Covid-19	74.3

2020 Trump voters

The risk of a new economic and financial crisis	80.7
Excessive immigration	79.1
Attacks on freedom of speech	75.8
Opioid abuse	73.0
Mental health issues	71.5
Terrorism within the United States	71.2

2020 Trump-Biden switchers

The risk of a new economic and financial crisis	75.8
Climate change	75.1
Mental health issues	74.5
Division and polarisation in American society	73.3
Covid-19	72.4
Terrorism within the United States	71.4

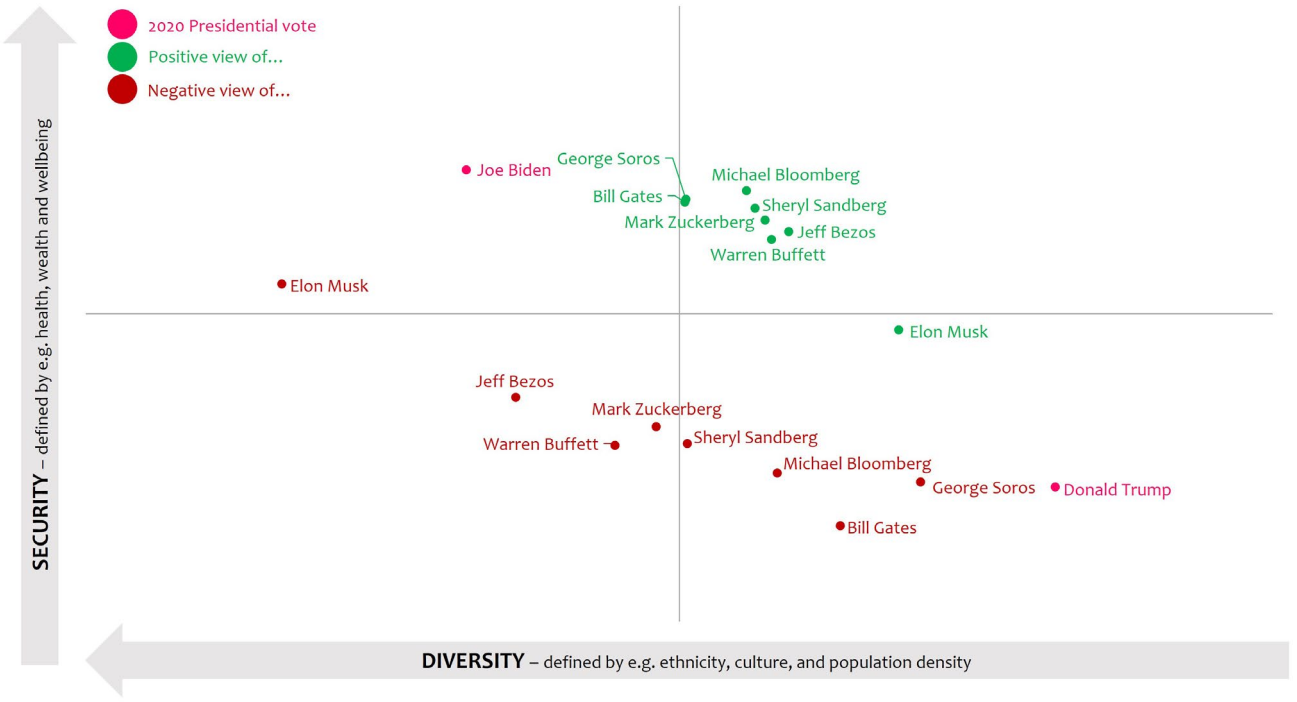


Asking people how they felt about various **public and private institutions** produced a slightly different but equally revealing pattern. Positive views of big businesses and government bodies are most likely to be found in the top-right quadrant – whose inhabitants have, broadly speaking, done well out of life and take a positive view of success.

Disapproval is much more widely scattered. Those who take a dim view of Disney or Twitter, for example, are close to Trump territory, while the very small numbers who dislike their local police force are most likely to be found in the most diverse, least prosperous bottom left. Uniquely for a government institution, views of the US Supreme Court now fall along political lines.

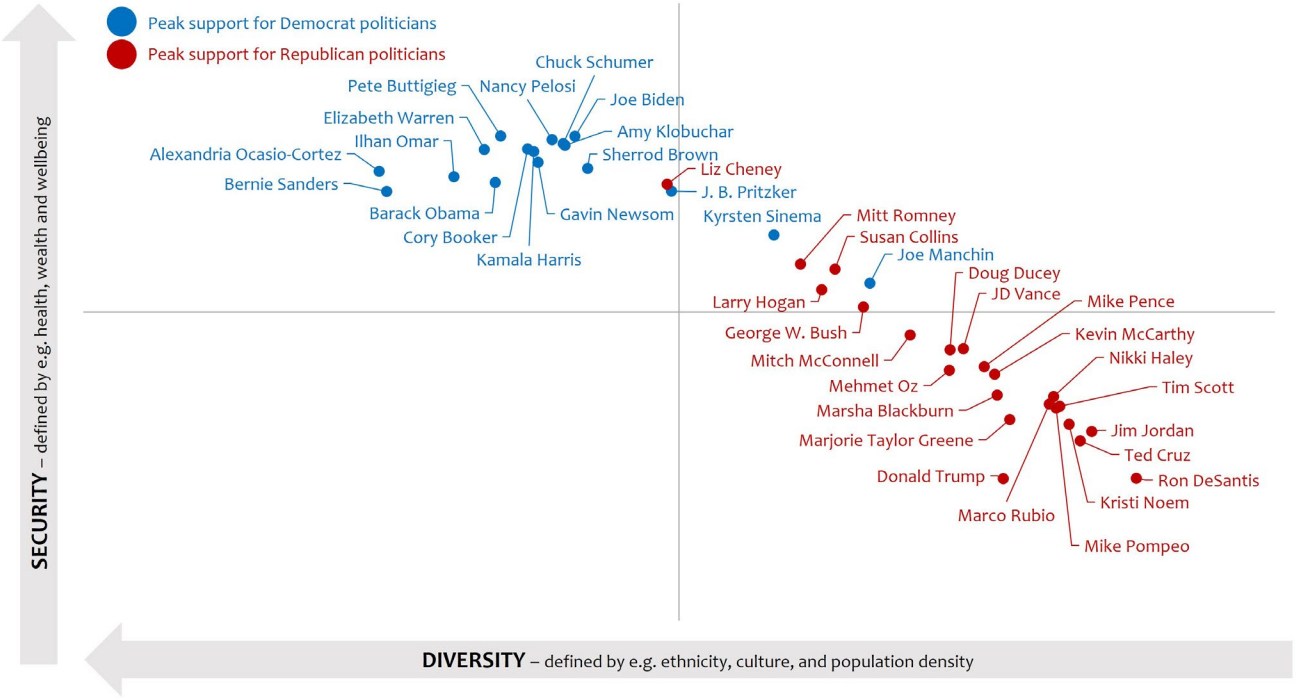
We see a similar pattern when it comes to **prominent individuals in the business world.** In most cases, support is greatest in the pro-success top-right quadrant, with negative views more widely dispersed. Those with an aversion to George Soros, for example, are most likely to be found in the bottom right, as are the relatively small number who have taken against Bill Gates. Meanwhile, disapproval of the increasingly outspoken Elon Musk is heavily concentrated in the liberal quarter, while his supporters are now most likely to be found closer to Republican territory in the bottom right.

Our map also reveals variations in musical taste. The closer to the centre, the more universal the appeal, and we can see that no genre is very far removed. Those naming country as among their favourite kinds of music were most likely to be found in the less prosperous, less diverse bottom-right quadrant, making it the only genre whose centre of gravity was in Republican territory.


2020 Presidential vote
Positive view of...
Negative view of...
SECURITY – defined by e.g. health, wealth and wellbeing
Joe Biden
George Soros
Michael Bloomberg
Bill Gates
Sheryl Sandberg
Mark Zuckerberg
Jeff Bezos
Warren Buffett
Elon Musk
Elon Musk
Jeff Bezos
Mark Zuckerberg
Warren Buffett
Sheryl Sandberg
Michael Bloomberg
George Soros
Donald Trump
Bill Gates
DIVERSITY – defined by e.g. ethnicity, culture, and population density

2020 Presidential vote
Favorite music
SECURITY – defined by e.g. health, wealth and wellbeing
Joe Biden
Jazz
Soul
Reggae
Dance/Electronica
Rap
Hip-hop/RnB
Folk
Drum & bass
Rock/Pop
Disco
Blues
Easy listening/Musical theatre
Classical
Heavy metal
Country
Donald Trump
DIVERSITY – defined by e.g. ethnicity, culture, and population density

POLITICIANS, PARTIES AND 2024



Asking how positive or negative people feel about **politicians** produces a now-familiar divide, but in an intriguing pattern. Those who currently have the most positive views of Joe Biden are further to the right on our map than the centre of gravity of those who voted for him – perhaps suggesting that some liberals voted for him without enthusiasm, or have since lost confidence in his presidency, or a combination of the two.

Few had been impressed with Kamala Harris. In most groups, participants (including African Americans) noted that she seemed to have been picked primarily because of her gender and ethnicity, and seemed out of her depth as Vice President. There was little or no support in the groups for the idea of Harris as the Democrat nominee in 2024. Transportation Secretary Pete Buttigieg was often mentioned as a potentially attractive candidate, appearing moderate and competent, but there was a widespread view that American voters were not yet ready to see a married gay man in the White House.

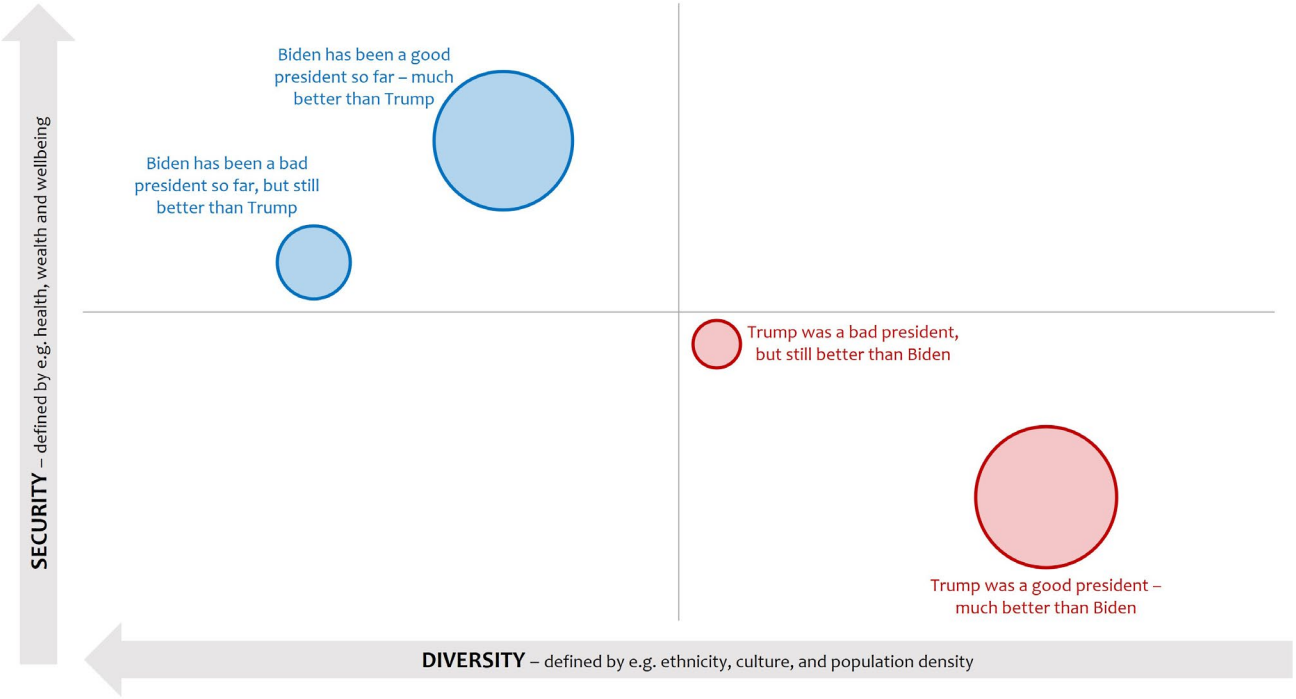
GEORGE W. BUSH, ONCE CRITICISED AS ONE OF THE MOST DIVISIVE PRESIDENTS IN HISTORY, HAS BECOME ALMOST A CENTRIST FIGURE.

Our map also shows the respective positions of Liz Cheney and Joe Manchin. By taking a principled stand against the leadership of their respective parties, each has evidently won the respect of moderate voters but unfortunately in the process won more admirers among opponents than on their own side. George W. Bush, once criticised as one of the most divisive presidents in history, has become almost a centrist figure. The only political figures with net positive ratings overall were Barack Obama, Bernie Sanders and George W. Bush.

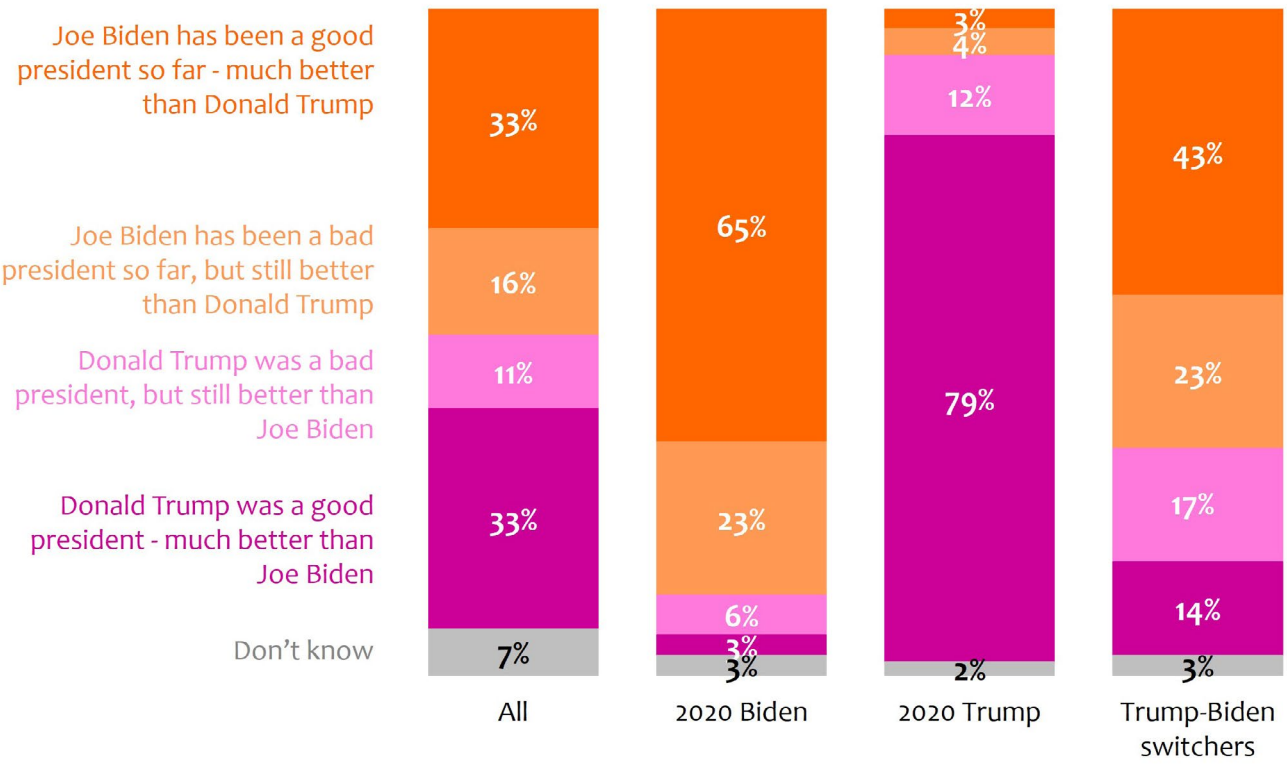
Those who at the time of polling had the most positive views of Ron DeSantis were firmly in Trump territory, which has potentially explosive implications for the run-up to 2024. We found in our focus groups that Republicans outside Florida respected the way he stood up for his state, and had looked with envy at his light-touch covid regime. His own voters particularly enjoyed his outspoken defence of conservative values and his approach to education and parental choice and appreciated his determination to keep Florida open as far as possible during the pandemic. A few potential Republicans said he seemed like a career politician – a sharp contrast from Trump – but for others he was a less erratic and "more palatable" version of the former president. Liberals often told us they worried about him more than Trump: "he's scarier because he's smarter," as one put it.

LIBERALS OFTEN TOLD US THEY WORRIED ABOUT RON DESANTIS MORE THAN TRUMP: "HE'S SCARIER BECAUSE HE'S SMARTER," AS ONE PUT IT.

COMPARING TRUMP AND BIDEN PRESIDENCIES...



Which of the following comes closest to your own view?



Comparing the Trump and Biden presidencies, we found in our poll that the numbers saying Biden had been a much better president than Trump and vice versa were precisely equal; they appear on our map where you would expect. More than 3 in 10 Trump-Biden switchers in my poll said they now thought Trump had done a better job than his successor. But strikingly, those who think Biden has been a bad president but better than Trump are most likely to be found not in the moderate centre ground, but among much more liberal and left-leaning constituencies. This suggests that if Biden is not to be the nominee next time, there will be pressure to pick a more radical candidate.

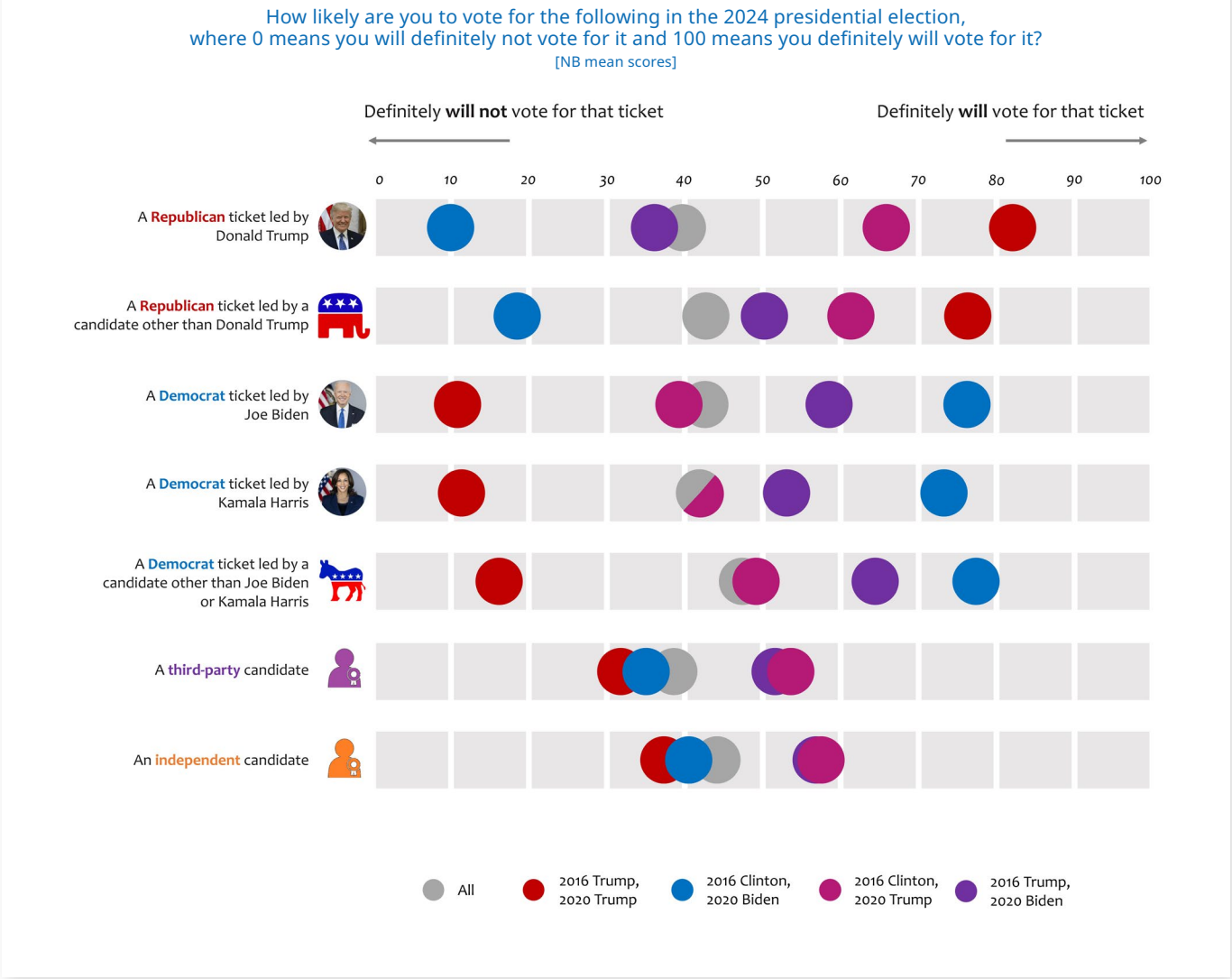
In our focus groups, there was some relief (including among Trump voters) that day-to-day politics had calmed down somewhat since the inauguration of President Biden ("there's a lot less noise"). However, few thought the country's underlying political tensions had dissipated, and some felt that by labelling MAGA Republicans as a threat to democracy, as he did during the midterm campaign, the new president had tried to stoke them.

Our groups could only recall a handful of policy initiatives from the Biden administration: student loan forgiveness, some environmental and energy-related actions, the infrastructure bill, and support to Ukraine – about each of which there were very mixed views. Many outside the Democrat core felt there had been little to show for a period in which the party controlled the White House and both Houses of Congress.

For many voters, the more immediate concern was whether Biden himself was up to the job. In our groups, participants of all shades of opinion noted that the president seemed to be experiencing what they described as "age-related issues" and often appeared confused in his public appearances. The general expectation was that he would not run again in 2024.

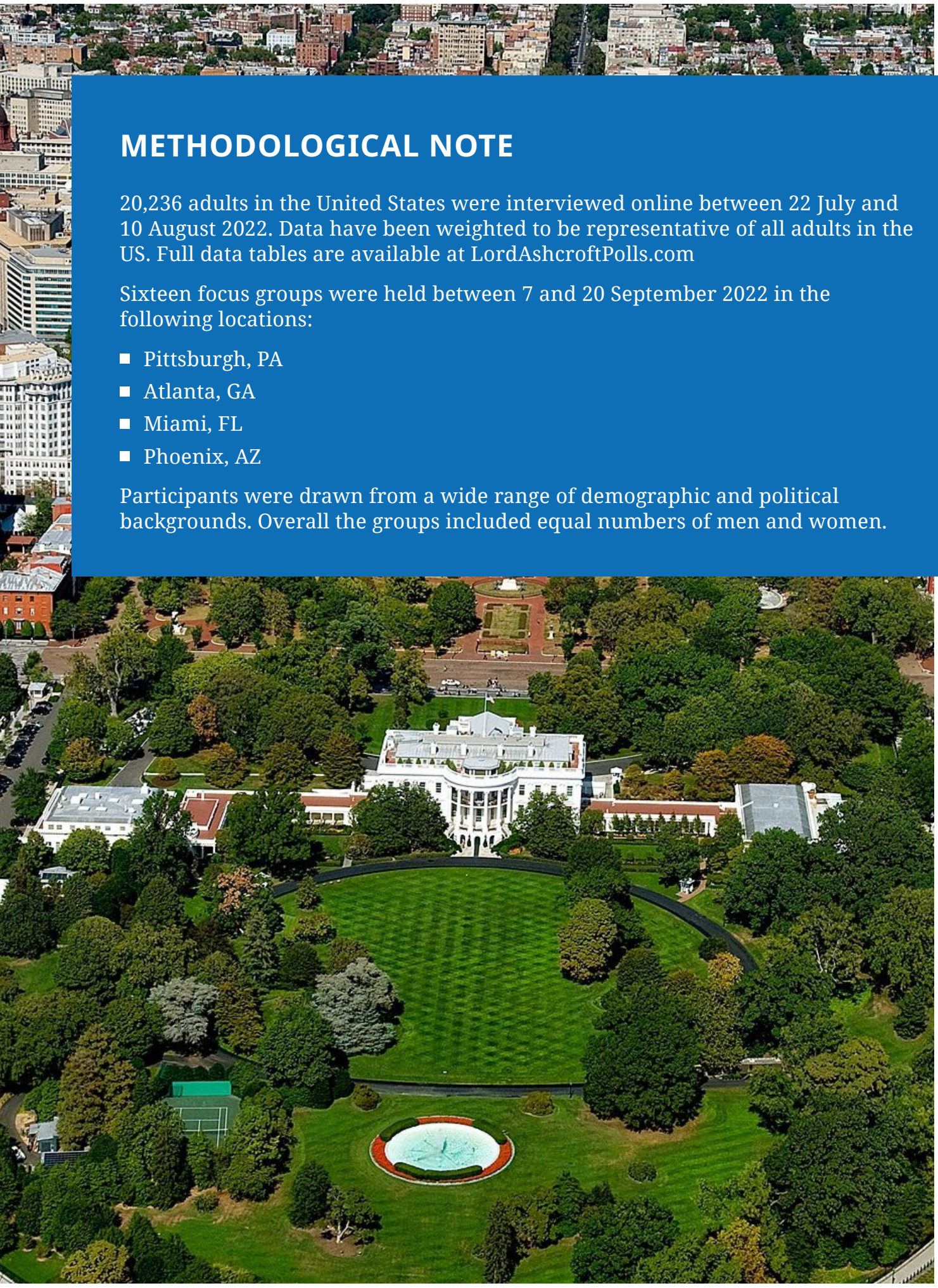
When it came to the true **2020 result,** many of those who had voted for Trump agreed with him that the election had, to some degree, been "stolen" (and none doubted that Trump himself really did believe it). However, this label masks a spectrum of opinion. The most committed do believe that ballot boxes were stuffed, Trump votes destroyed, or tallies manipulated in cases of outright fraud. But others who reject this still point to what might be called a "soft steal" – that under the guise of covid, some state authorities did everything in their power to give Biden the best possible chance, by relaxing the rules on things like registration, early voting and absentee ballots.

The events of **January 6 2021** continued to exercise many participants. Our polling found a roughly equal divide between those who think Trump should be prosecuted for his role, and those who think either that he had no responsibility at all, or that he bore some responsibility but prosecution would only serve his agenda and prolong divisions. In our groups, many thought the issue had been overblown ("it was like a bad tailgate party that got out of hand", as a participant in Atlanta put it). Even many of his own voters thought he should have done more to calm the situation and uphold the dignity of the office ("dude, you were the Commander-in-Chief").



We asked in our poll how likely people currently thought they were to vote for various **presidential tickets,** on a scale from zero to 100. If support for Biden was lukewarm, especially among those who had switched to him from Trump, Democrats were less keen to turn out for a ticket led by Kamala Harris. Overall, support was higher for a Democrat ticket led by neither the president nor the vice president.

2020 Trump voters said they were more likely than Biden voters to say they would vote the same way again in 2024. However, voters as a whole said they were more likely to vote for a non-Trump Republican than for Trump himself. This was especially true of 2020 Biden voters, and even more so of those who switched from Trump to Biden two years ago.



METHODOLOGICAL NOTE

20,236 adults in the United States were interviewed online between 22 July and 10 August 2022. Data have been weighted to be representative of all adults in the US. Full data tables are available at LordAshcroftPolls.com

Sixteen focus groups were held between 7 and 20 September 2022 in the following locations:

- Pittsburgh, PA
- Atlanta, GA
- Miami, FL
- Phoenix, AZ

Participants were drawn from a wide range of demographic and political backgrounds. Overall the groups included equal numbers of men and women.

ABOUT LORD ASHCROFT

LORD ASHCROFT KCMG PC is an international businessman, philanthropist, author and pollster. He is a former treasurer and deputy chairman of the UK Conservative Party. He is also honorary chairman and a former treasurer of the International Democrat Union. He is founder and chairman of the board of trustees of Crimestoppers, vice-patron of the Intelligence Corps Museum, chairman of the trustees of Ashcroft Technology Academy, a senior fellow of the International Strategic Studies Association, former chancellor of Anglia Ruskin University and a former trustee of Imperial War Museums.

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