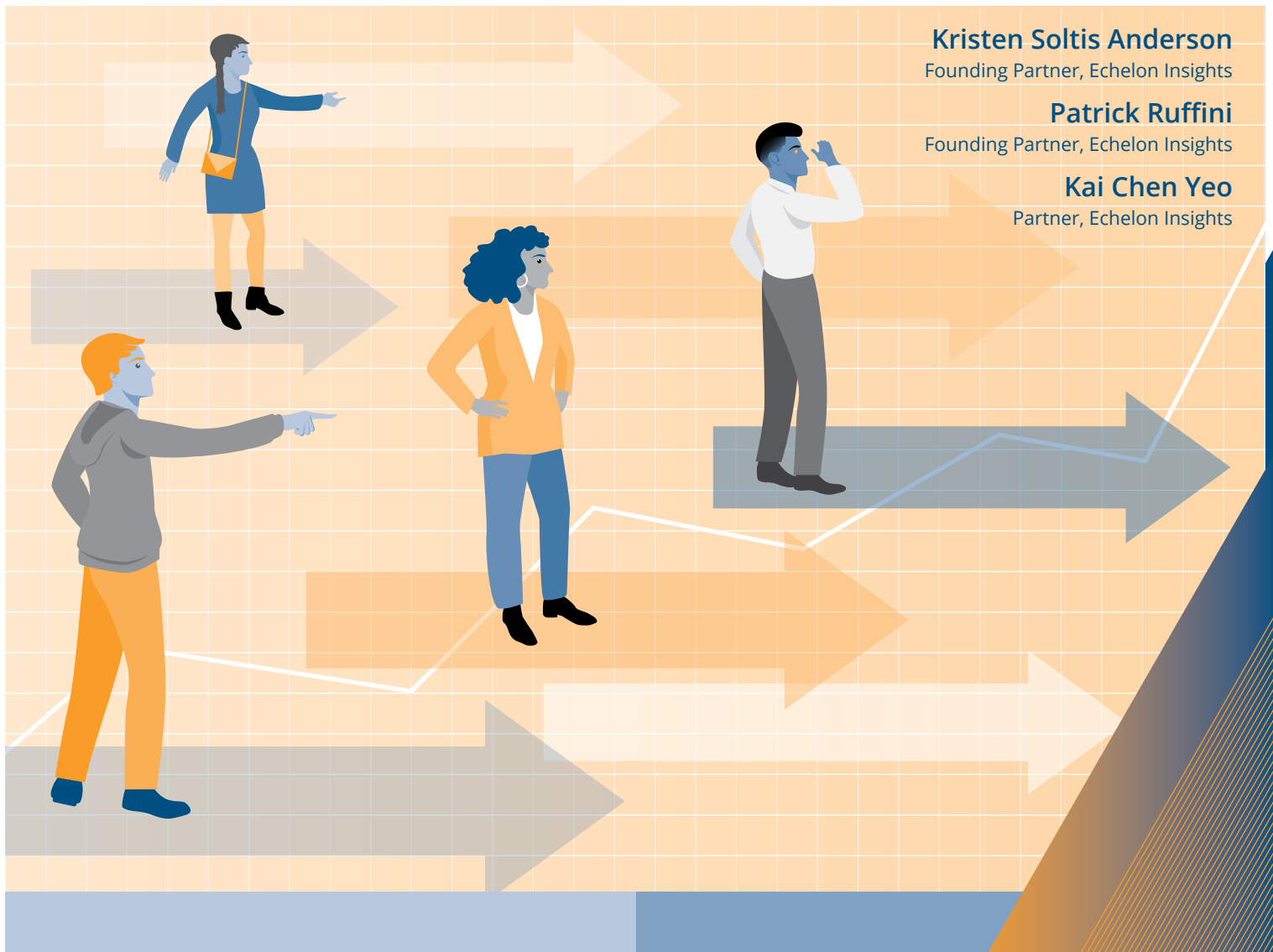


The Seven Trends Reshaping American Politics



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Introduction:

Slow-Motion Trends in a Fast-Changing World

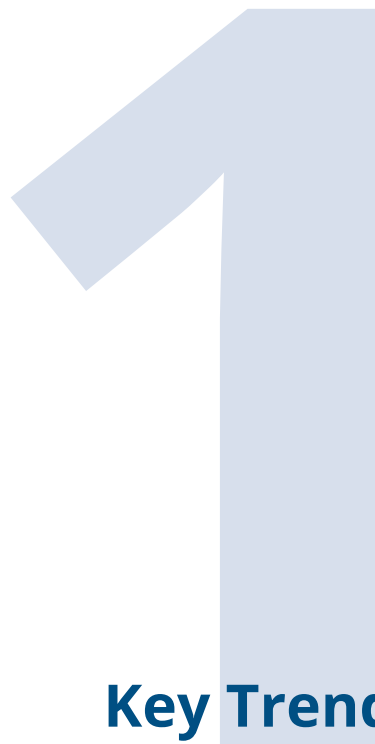
We are living in an era of rapid transformation. New cultural, technological, economic, and demographic trends are remaking the global political landscape. The way people get and process information about the world around them has changed, expanding people's access to knowledge but bringing with it a host of problems such as misinformation, "filter bubbles," and heightened polarization. The addition of a global pandemic to this already fraught landscape has raised major questions about where our world is headed.

At the same time, there are many changes that have been developing for years if not decades that are also beginning to influence politics in non-obvious ways. Americans with more education are moving to denser areas, reshuffling our divides as well as the political balance of power across the country. Rising racial and ethnic diversity is having some unexpected effects on who wins elections and what issues are salient. Younger generations clamoring for influence against the backdrop of an aging society. Cultural clashes are arising anew and the political right in particular is reorienting around these clashes. Social trust and faith in democracy are being challenged. Americans see their power in the world declining and worry about the potential threat of a rising China.

The United States is often a leading indicator of broader political trends in other advanced democracies. This report, commissioned by Konrad-Adenauer-Stiftung USA, aims to understand the political trends we are experiencing with an eye toward the long view. While plenty of analysis looks at the next election, or the duel between the two political parties in a short-term context, this report will look at the way demography and shifting public opinion can give us a glimpse into American politics a decade or two in the future.

In order to achieve this understanding, we have built this report around public opinion polling on critical topics, paired with in-depth analysis of the newly-released U.S. Census Bureau data coming from the 2020 decennial Census. Every ten years, the United States Government undertakes a count of every person living in the United States and uses that data to inform things like Congressional redistricting, reapportionment of legislative seats, and allocation of various government resources. This data set often gives us the most granular look at who Americans are and where they are living. While some of this data has been delayed or was not fully available at press time, we have examined the data released as of September 2021 and supplemented it with prior Census bureau estimates when looking for important trends in American politics.

This report will illuminate the ways in which America is changing and what these changes might mean for the American - and global - political future.



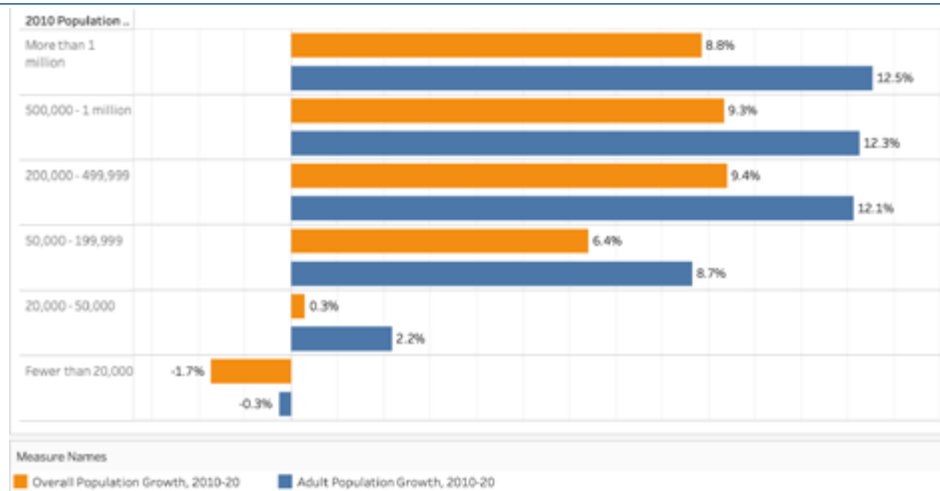
Key Trend #1:
**Rising Polarization
Along Educational and
Geographic Lines**

■ Key Trend 1: Rising Polarization Along Educational and Geographic Lines

When the Decennial Census data was released this August, one surprise tucked away in the data was that New York City's population grew by 7.9% after decades of stagnant growth. The extent of this growth was entirely unexpected by watchers of Census data. The Census' 2019 estimates pegged New York City's population at 8.336 million, much lower than the 8.822 million total enumerated in the 2020 Census. The total difference of 485,564 meant that the City would receive the near-equivalent of an extra Congressional seat that no one expected.

New York City's surprise growth illustrates just how much America's major metropolitan areas have grown in the last decade, over and above experts' predictions. The flip side of this trend is an emptying out of rural America. The recent Census figures show that 1,660 counties saw population losses from 2010 to 2020, an increase from the 1,082 counties that lost population from 2000 to 2010. These counties are large in numbers but represent a smaller (and dwindling) share of the U.S. population. Overall, counties with a population greater than 200,000 in 2010 — representing two thirds of the country that year — saw population growth of more than 9%. Counties with a population of less than 50,000 in 2010, representing 12% of the country that year, saw their population decline in the last decade.

Urban and Suburban Growth, Rural Decline



SOURCE: Echelon Insights analysis of 2010 and 2020 Census PL 94-171 Redistricting Summary File Data

Overall, counties that started between 200,000 to 499,999 in population grew the most from 2010 to 2020. But adult population growth was slightly higher in large urban counties of more than one million, showing higher levels of internal migration by adults into these counties. The COVID-19 pandemic raised questions about whether large cities like New York and San Francisco might see population growth reverse, as knowledge workers chose slower, more affordable locales from which to work

remotely. The Census data does not capture the effects of the pandemic, but it does show that cities were in a strong position prior to it, and most indicators show cities making a strong recovery as their economies reopen.

The continued growth of large metropolitan areas has driven large political shifts over the last decade. In that time, urban and rural areas have become more polarized than ever before in their voting patterns, with urban areas trending further left and rural areas further right. It has long been the case in America and in most Western democracies that large cities tend to vote for the party of the left, and rural areas tend to vote for the party of the right. But exceptions to this rule used to be easier to find, with strong Democratic voting in heavily rural areas like West Virginia or the Iron Range of Minnesota, and Republican strength in suburbs very close to the city limits.

In today's political climate, however, there are almost no exceptions to the rule. Joe Biden won the presidency despite winning only 520 counties — just 17% of the total. America is seeing nearly perfect partisan sorting based on geography.

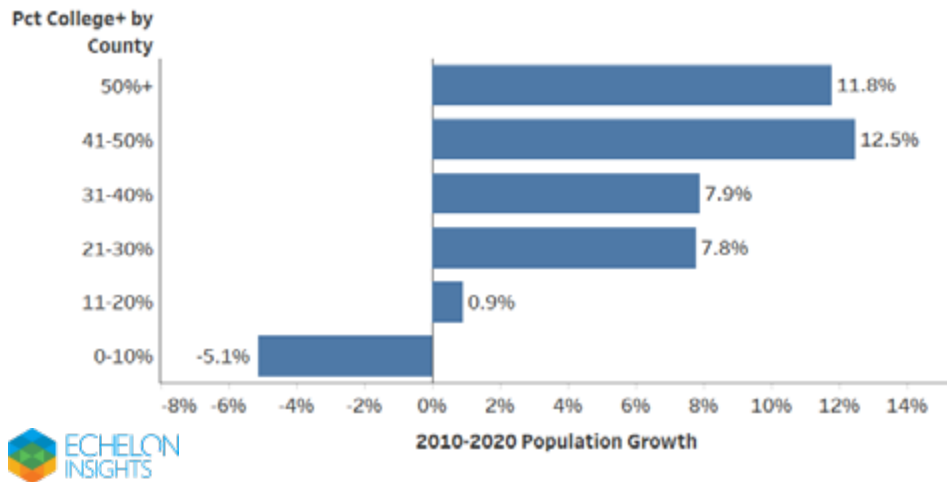
After the 2016 election, election analyst David Wasserman ran an analysis showing that just 303 of the nation's 3,113 counties were decided by less than 10 points that year. In 1992, this number was 1,096. In 2020, just 281 counties were decided by less than 10 points. Americans are becoming increasingly divided by place, with Democrats and Republicans less and less likely to live in close proximity to each other.¹

Partisan sorting is less a function of density itself and more a result of the clustering of college-educated professionals in large cities: a self-reinforcing trend where the more upwardly mobile professionals move to a city, the more businesses want to locate there, the more like-minded new arrivals they attract. Often, employees of these firms bring a set of progressive values, which has touched off controversy as the companies themselves embrace concepts like “diversity, equity, and inclusion” and take progressive stances that alienate their politically conservative customers. Employment growth, population growth, and higher education are strongly interrelated. Counties where more than 50% of adults had a Bachelors' Degree or higher grew by 13% in the last decade, while those where fewer than 10% had a Bachelors' Degree shrunk by 11%.

¹ Wasserman, D. (2017, March 8). Purple America Has All But Disappeared. FiveThirtyEight. Retrieved September 30, 2021, from <https://fivethirtyeight.com/features/purple-america-has-all-but-disappeared/>.

■ Key Trend 1: Rising Polarization Along Educational and Geographic Lines

2010-20
Population
Growth, by
County-Level
Percent College
Graduate for
Adults



And education itself, a factor strongly related to population shifts, is becoming the major dividing line in American politics, especially among whites. Between 2012 and 2020, whites with a college degree moved an estimated 21 points in margin towards the Democratic Party, while those whites without a degree shifted an estimated 13 points towards the Republican Party.²

The Political Upshot of Polarization

The assumption is that population growth in increasingly liberal areas should be good for Democrats, and it has been in the sense that the party has won the popular vote in six out of the last seven Presidential elections. However, the design of America's constitutional system puts a political party with disproportionate support in large states with big cities at a disadvantage.

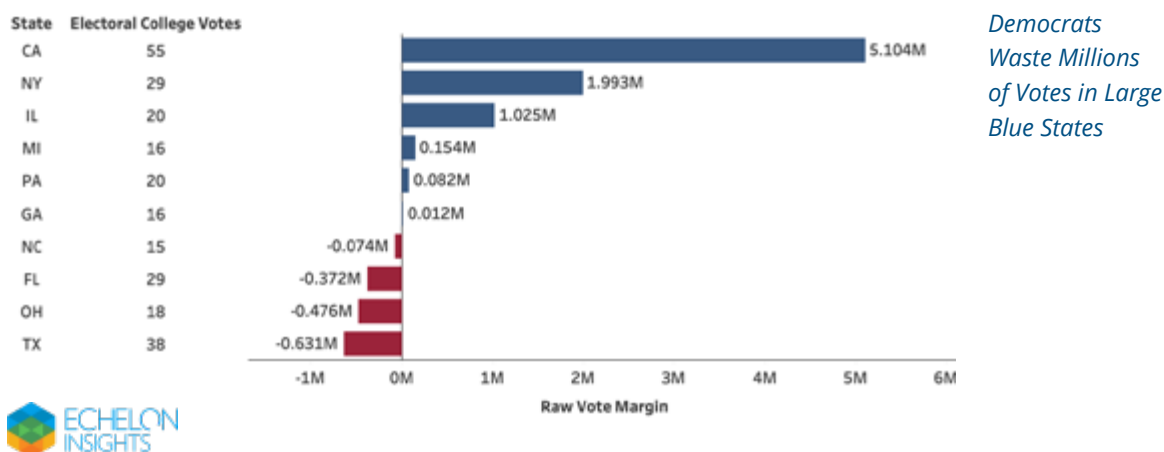
The most prominent of these effects is seen in the Electoral College, which decides the outcome of Presidential elections. With most states voting as a unit, and each state plus the District of Columbia receiving an automatic two electoral votes before votes are allocated according to population, the system already has a bias in favor of smaller, more rural states.

This rural bias is relatively insignificant compared to recent dynamics in how larger states have voted. California, the largest state, with 54 electoral votes after the 2020 Census, has in recent years voted in lopsided fashion for the Democratic nominee — voting 63 to 34 percent for Joe Biden and 61 to 31 percent for Hillary Clinton. By contrast, Texas, the largest Republican state, which will have 40 electoral votes following the 2020 Census, has lately supported Republicans by much narrower margins — 52 to 46 percent for Trump in 2020 and 52 to 43 percent in 2016. Up until

² Echelon Insights analysis of 2016 and 2020 national exit polls and county-level election results.

2004, Republicans used to win Texas by wider margins — on both a raw vote and percentage basis — than Democrats won California.

This trend is being duplicated across a host of larger blue and red states. New York went Democratic by 23 points and Illinois by 17 points. Meanwhile, Florida went to Trump in a surprise by a narrower margin, 3 points. The combined effect is a huge number of wasted votes for Democrats in blue states, particularly those playing host to or adjacent to the so-called “superstar” metros like New York, San Francisco, Los Angeles, Washington, D.C., and Chicago.



Joe Biden won the Electoral College vote by 306 to 232 and the popular vote by 4.5 percentage points, but a uniform swing in the popular vote of just 0.63% would have been enough for a 269-269 Electoral College tie that in all likelihood would have been decided in Donald Trump’s favor in the House of Representatives. The resulting 3.8 point bias in the Electoral College — where a margin less than that would have meant the popular vote winner did not win the election — was even more pronounced than the 2.8 point pro-Republican bias in 2016, when the popular vote winner did lose. This is a direct result of Democratic votes being inefficiently concentrated in the larger metropolitan areas in the largest states, which are only growing in population.

In the Senate, small state bias more clearly gives Republicans the advantage, though Democrats are fortuitously in the majority having captured a duo of Senate seats in Georgia after Donald Trump stoked distrust among his supporters about the legitimacy of the state’s November election results, leading to depressed Republican turnout and Democratic victories in the January 5, 2021 runoffs for both seats.

It is in the House of Representatives that partisan polarization between urban and rural areas most directly affects day-to-day policymaking and governance. The 2020 Census numbers, delayed by the pandemic, have kicked off an accelerated process of redistricting, where states draw new boundary lines for the federal House districts



■ Key Trend 1: Rising Polarization Along Educational and Geographic Lines

and state legislatures. The increasing concentration of liberal, Democratic, and college-educated voters in metropolitan areas will make it easier for states to draw lines that further reduce the number of seats competitive between Democrats and Republicans, and create new seats with more lopsided majorities for either party.

While Republicans retain control of the redistricting process in more states, the 2020 redistricting cycle may not clearly benefit them as it has in the past. That's because big metropolitan areas posted large population gains that make it virtually impossible for them not to get more solidly Democratic seats drawn. For example, Texas Republicans have been known to aggressively "gerrymander" (the process of drawing oddly-shaped districts to collect more of a party's voters together for partisan advantage). This year, their proposed Congressional map concedes previously competitive seats in Dallas and Houston to the Democrats and draws an entirely new Democratic-majority seat in the fast-growing Austin area. The map maintains the existing partisan balance while protecting Republican incumbents in the suburbs whose seats had gotten much bluer under Donald Trump. This larger number of safer seats will come at the cost of fewer seats competitive between the parties, a pattern we are likely to see repeated in other states.

Democrats may well hold their own in redistricting in the House due to the dramatic shift of many inner suburbs towards the Democratic Party and the newfound ease with which those areas can be combined with Democratic voters in the cities. Until 2016, prosperous inner suburbs voted reliably Republican — represented by places like Georgia's 6th Congressional district on the outskirts of Atlanta, Texas's 32nd district in the Dallas suburbs, Texas's 7th district in Houston, and the ruby red block of seats in Orange County, California. The attachment these areas had to the Republican Party was not only demographic — there were deep historical roots. Today's 7th District was one of the first places in Texas to turn Republican, electing George H.W. Bush to Congress. Orange County, California, a county built by the aerospace and defense industries, voted for Barry Goldwater in 1964, and was more than 30 points to the right of the country as a whole that year.

The polarization along educational lines that accelerated during the 2016 election turned these former Republican bastions to toss-up seats or worse, and Democrats were able to capitalize with a near-sweep in inner suburban seats that had swung towards Hillary Clinton in the 2018 House elections. Population growth and the continued shift of white college-educated voters to the Democratic camp made most of these seats solidly Democratic in 2020.

The dwindling of the Republican voting base close to major cities makes it easier to draw lines that serve partisan outcomes without gerrymandering. The Trump elections accelerated a sorting of voters along cultural and educational lines that happens to coincide with where voters decide to live. Democrats now did better with higher income voters who could afford to pay the premium to live close to the city, whereas in 2010, Republicans in most of the major metros had a presence closer to the city limits.

We are seeing these trends play out in most of the maps released thus far, even in states where nonpartisan commissions, not partisan legislatures, draw the lines. The use of these nonpartisan commissions will be more widespread this redistricting cycle, after voters in numerous states from Michigan to Ohio to Virginia voted to institute them in place of more partisan map-drawing processes. Nonetheless, an initial draft by Michigan's independent commission has yielded a map that is more Republican-friendly than the one that was the result of a Republican-led redistricting in 2010. Cities tend to vote more lopsidedly Democratic than rural areas vote Republican, and Democrats' new suburban strength concentrates Democratic voters further. The Voting Rights Act also requires the drawing of Black and Hispanic-majority districts, which tend to be very Democratic. The large Democratic margins with these demographics tends to mean their voters are packed into fewer districts.

Nonetheless, booming urban growth will still create more safely Democratic seats in the House, as with the surprise bonus Congressional seat for New York City, the new district in Austin, Texas, and the fact that a nominally competitive 10th district in the Virginia suburbs of Washington, D.C. is now likely to become safely Democratic as population growth pushes the district lines closer to the blue urban core.

Other states where partisan bodies are likely to have the final say — states like New York and Illinois for the Democrats or Texas, Florida, or Indiana for the Republicans — are likely to result in more seats friendlier to the party drawing the lines.

Continued partisan sorting, ratified by the post-2020 redistricting cycle, is likely to make Congress even more ideologically polarized, with Members only facing the threat of real competition in party primaries. This could make it harder than it is already to build bipartisan consensus around any issue, at least in the House. Factional groups like the House Freedom Caucus on the right or the Congressional Progressive Caucus on the left could be more emboldened to defy their party's leadership, as the number of competitive seats where representatives might be rewarded for their moderation dwindles.

Partisan Polarization: No End in Sight?

Partisan sorting based on education and population density is not the result of political or media manipulation as some have claimed. It is a widespread phenomenon, with parallels in other Western democracies, and so strong and consistent that one might be tempted to regard it as a quasi-natural phenomenon. In countries across the West, educated professionals have generally migrated to the left in recent decades while the right garners greater support among rural voters and those with lower educational attainment, leading to a more populist-flavored politics on the right.



■ Key Trend 1: Rising Polarization Along Educational and Geographic Lines

The question of whether Donald Trump will run in 2024 and potentially push this trend even further looms large in Republican politics. Regardless of whether he runs or not, this trend appears likely to continue in some form, even if some reversion to the pre-2016 average is to be expected in any election where Trump himself is not on the ballot.

Polarization in some areas could also lead to depolarization in other areas. As education polarization increases, racial polarization will decrease, as nonwhite, non-college educated voters are increasingly drawn to the Republican Party. As we outline in our forth key trend, racial depolarization could be a healthy development for American democracy. These shifts could also change the issues the parties are highly polarized on, and which they might agree on.

The narrative of increasing polarization overlooks how many issues have been decided quietly and by consensus in the American political system in recent years. In the social issues arena, opposition to gay marriage has steadily eroded as the Supreme Court ruled it the law of the land in 2015. In the economic arena, representatives in both parties came together to pass three rounds of stimulus legislation in response to the pandemic. It is on these economic issues where we might be seeing Republicans moving towards the center, as high-income voters move away from the party and the party's traditional economic agenda of cutting taxes and reducing government loses its strongest constituency within the party. The new polarization along educational lines is creating two parties whose coalitions are in flux, where traditional economic debates matter less and cultural divisions that separate Americans based on where they live matter more.

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Key Trend #2:

**Growing Communities
Shift The Congressional
Balance of Power**

■ Key Trend #2: Growing Communities Shift The Congressional Balance of Power

Seven House seats are impacted by the 2020 Census results, with shifts generally favoring states that tend to vote Republican. Texas gains two congressional seats, and Colorado, Florida, Montana, North Carolina and Oregon each gain one seat in Congress, continuing steady trends of Texas and Florida gaining seats in every decennial census since 1950. Seven states lose one vote each: California, Illinois, Michigan, New York, Ohio, Pennsylvania, and West Virginia.

GROWING STATES	1930	1940	1950	1960	1970	1980	1990	2000	2010	2020
Congressional seats change in TEXAS	+3	0	+1	+2	+2	+2	+3	+2	+4	+2
Congressional seats change in FLORIDA	+1	+1	+2	+4	+3	+4	+4	+2	+2	+1

Republican state legislatures are in control of redrawing 187 congressional districts, or 2.5 times as many as the 75 congressional districts being redrawn by Democrats. A further 167 districts will be redrawn by either independent commissions or split legislatures.

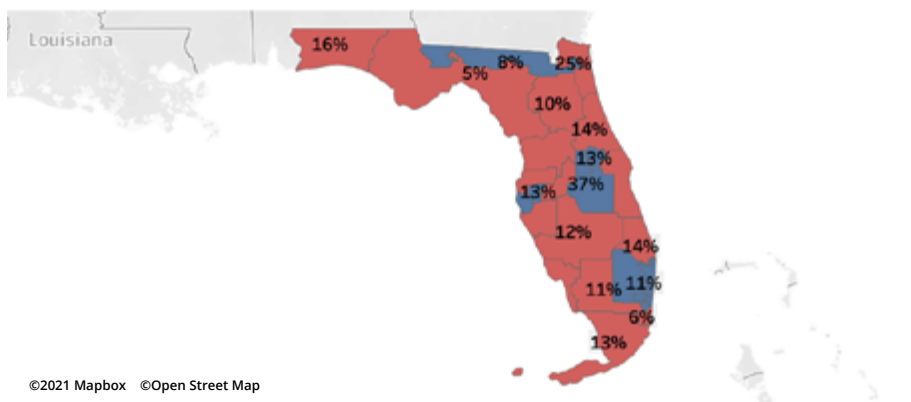
However, basic partisan lines matter less to how congressional districts are drawn — and which party they may ultimately favor. Instead, the distribution of populations across states dictate how new districts are drawn. Each congressional district within a state must have the same number of people, and rural areas typically populated by safely Republican voters have steadily lost residents over the past 10 years. Residents are instead shifting to cities and suburbs, with suburbs being the fastest growing parts of the country. New congressional districts will have to take into account slight population increases in reliably blue American cities, and rapid population increases in the suburbs, where voters may not be universally Democratic but have trended increasingly Democratic over the past few elections.

States where one party holds trifecta control over the governorship, majorities in the state senate, and majorities in the state house, and where state legislatures control the redistricting process still have to grapple with drawing seats which respect currently overpopulated congressional districts while potentially adding advantages for their respective parties. While no leader has absolute predictive power over voter trends in the fastest growing urban and suburban areas, states have begun to propose maps which add advantages by condensing safely partisan areas and building in new, competitive seats in potentially mercurial suburbs.

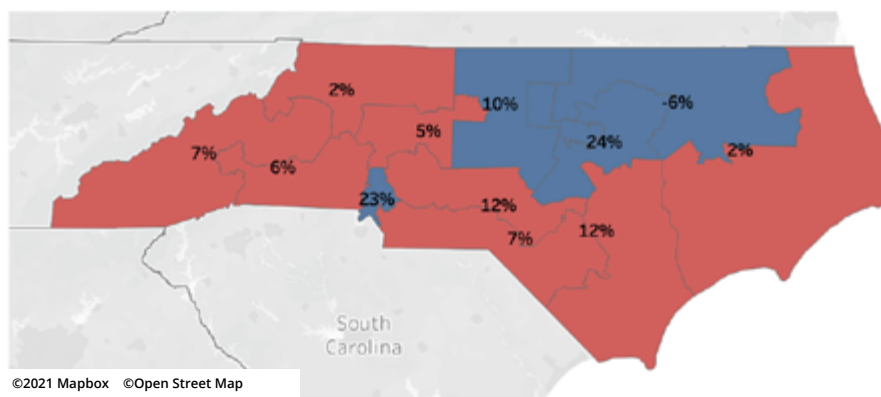
States Gaining Seats

In the following figures, red indicates Republican-held districts, while blue indicates Democratic-held districts.

Florida and North Carolina — two of the most populous states each gaining a seat — have seen the largest population growth in congressional districts held by Democrats in 2021 and in districts won by Biden in 2020 by at least 30 percentage points. Any new maps proposed by the currently Republican state legislatures will have to take into account the distribution of Democratic voters in the state. Adding new Republican leaning seats in the parts of the state with highest population growth risks drawing potentially Democratic voters into Republican-held districts — an especially high risk if more densely populated areas trend further to the left over the next few years.



Population change since 2010 by CD in Florida

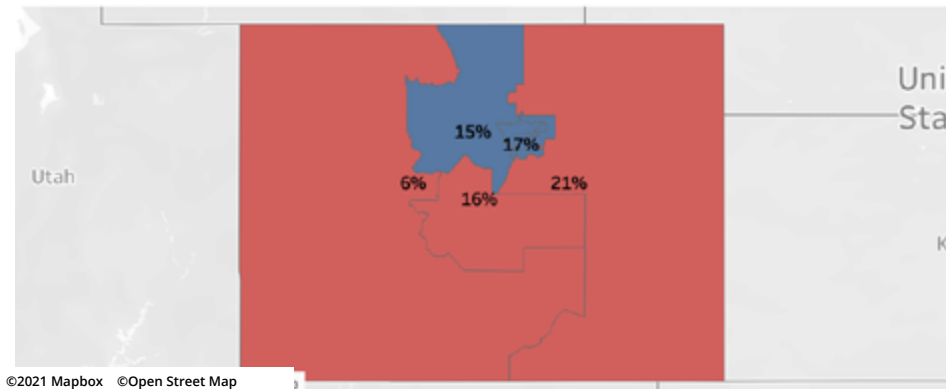


Population change since 2010 by CD in North Carolina

■ Key Trend #2: Growing Communities Shift The Congressional Balance of Power

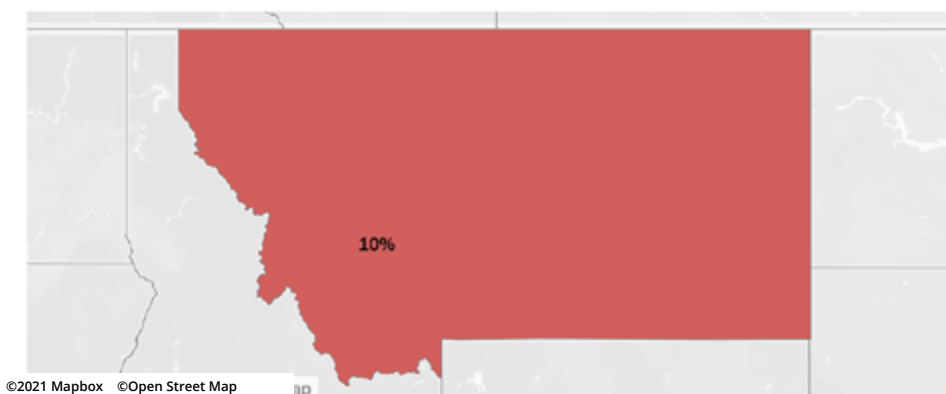
The potential for partisan advantages in states using independent commissions to draw new maps are less clear. Colorado's independent redistricting commission will likely add a new district in the Denver region, where much of the state's growth has occurred, likely adding a new Democratic seat.

Population change since 2010 by CD in Colorado

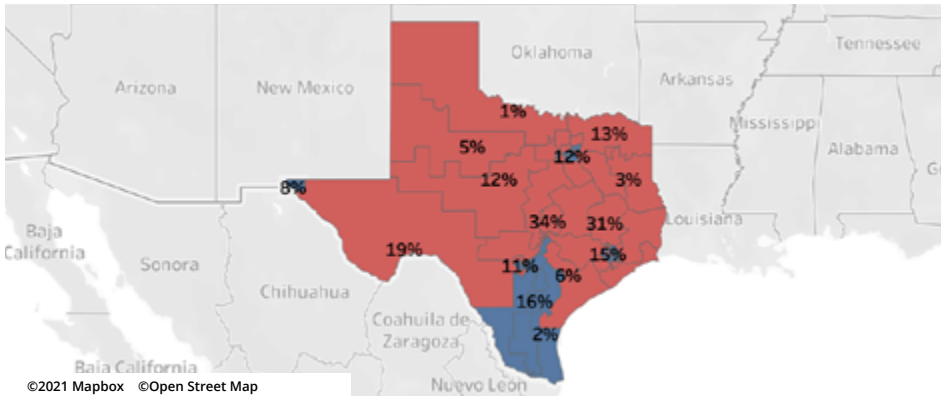


Montana's new map, also decided by a bipartisan commission, will be adding a new seat from the state's single at-large district in 2021 for the first time in 30 years. The state will likely split into two districts in the eastern and western halves as it was divided in 1992. While both seats will favor Republicans — Donald Trump held a 16+ point advantage over Joe Biden in 2020 in Montana, and a 20+ point advantage over Hillary Clinton in 2016 — Montana has still seen the highest population growth in its most left leaning counties in the eastern prairie region. The final map will likely create one deep red seat in the western mountain region of the state, but the new eastern seat will include Bozeman and Montana State University's Gallatin County, University of Montana's Missoula County, and the state capital Helena's Lewis and Clark County, creating a potentially competitive, if right leaning, opportunity for Montana Democrats.

Population change since 2010 by CD in Montana

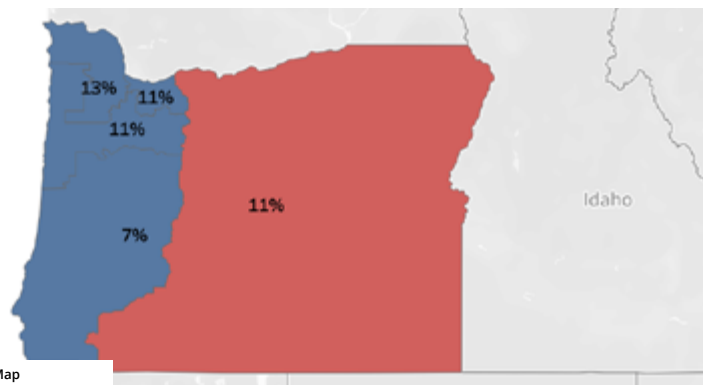


■ Key Trend #2: Growing Communities Shift The Congressional Balance of Power



Population change since 2010 by CD in Texas

Texas is the clearest example of regional population trends influencing the proposed 38 new congressional districts, up from 36 congressional districts in 2021. Though Donald Trump had a 5+ point advantage over Joe Biden in 2020 and a 9 point advantage over Hillary Clinton in 2016 in Texas, and Republicans hold trifecta control over the state House, Senate, and governorship, fast growing suburbs in places like Austin, Dallas, or Houston make it difficult to draw two new safely Republican districts. Instead, maps proposed by the state legislature build one new safely blue Congressional district in the heart of Austin and pack two further Democratic seats together in Houston and Dallas. While the proposed map adds two solidly red seats, and slightly increases the advantage to Republicans sitting in suburban areas, urban and suburban population growth mean the proposed map also turns five currently competitive seats into seats which lean Democratic.



Population change since 2010 by CD in Oregon

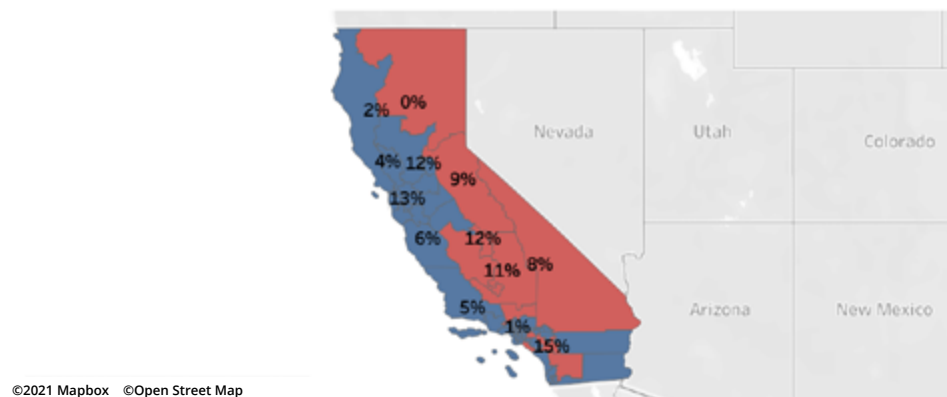
Oregon was the first state to redraw its congressional districts for the next ten years, passing the new five congressional district map on September 27, 2021. The Democratic trifecta in Oregon took into account growing populations in the Portland suburbs, maintaining four Democratic leaning districts and one Republican leaning district but added one competitive district spanning both the south Portland suburbs and redder counties in the east and south part of the state. This shifts two current swing seats to being more safely Democratic by taking advantage of the more densely populated and more urban eastern parts of the state while maintaining Republican advantages in the west.

States Losing Seats

In the following figures, red indicates Republican-held districts, while blue indicates Democratic-held districts.

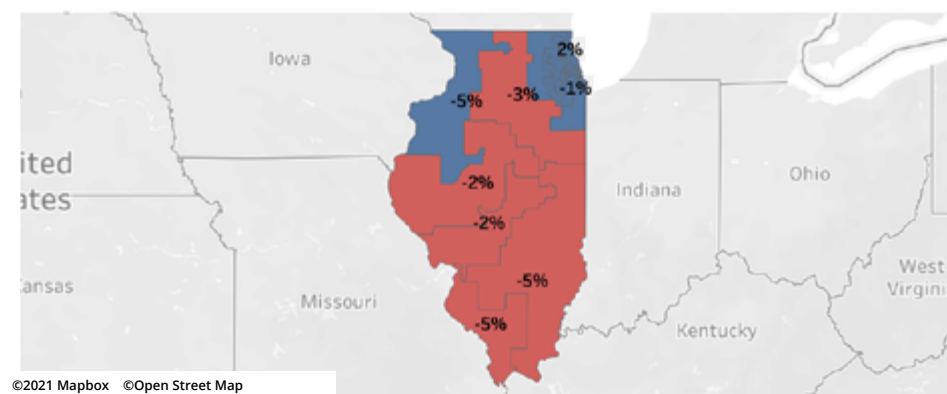
Though California remains the most populous state in the country, slow population growth means the state’s independent redistricting commission will have to decide which part of the state loses representation in Congress. Southern California has seen the slowest growth and the eliminated seat could be one of the safely Democratic districts in Los Angeles County. However, if new district lines are drawn to include more Democratic voters in the currently Republican held seat in northern Los Angeles County, it has the potential to maintain even representation for Democrats and a further disadvantage for Republicans in California.

Population change since 2010 by CD in California



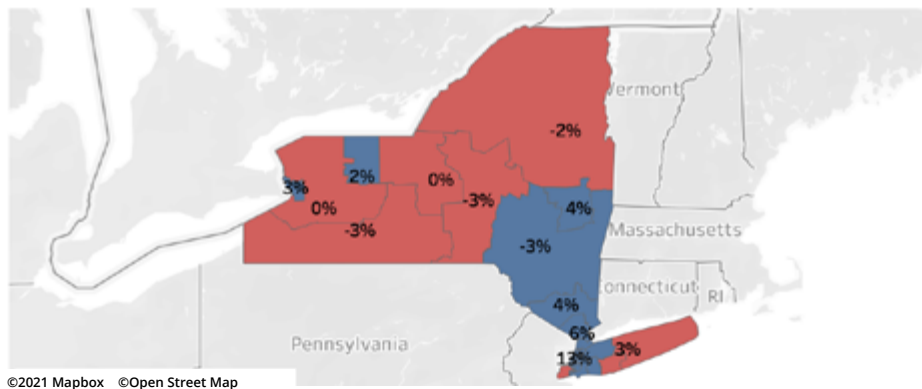
Democratic trifectas in New York and Illinois are controlling where to eliminate one district in each state, and both states are losing residents in rural, more Republican areas. Illinois will likely eliminate one of its five southern districts currently held by Republicans — and the five rural districts could be combined in a way which includes more Democratic voters in the Peoria and Springfield areas.

Population change since 2010 by CD in Illinois



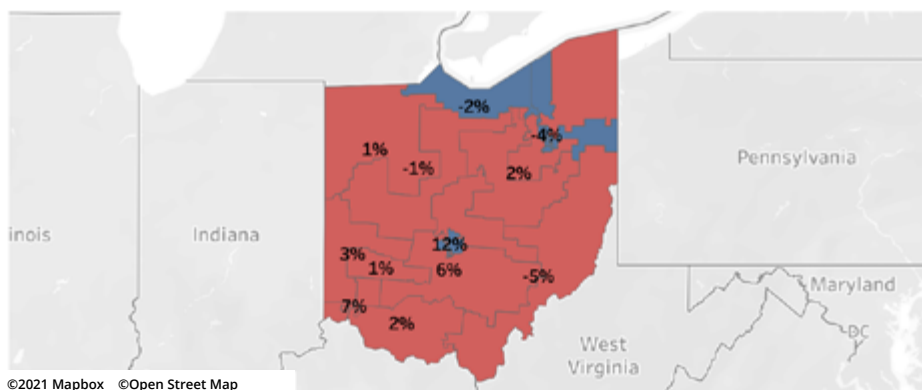
■ Key Trend #2: Growing Communities Shift The Congressional Balance of Power

As of the end of September, 2021, two maps have been proposed in New York, with each proposed map holding inverse advantages for either party. However, both maps contend with falling populations in rural western New York and shifting population trends in the southeastern Hudson Valley and Capital Region districts. The open question lies in whether the eliminated district will come from southwestern seats held by Democrats in 2021 or from a rural western seat held by Republicans in 2021.



Population change since 2010 by CD in New York

A Republican trifecta controls the redistricting process in Ohio, where Republicans currently hold 12 seats to 4 seats held by Democrats in 2021. Rust belt districts on the east side of the state have lost population at the highest rates since 2010, along with former manufacturing strongholds through the northern central region of Ohio. This puts at least two districts held by Democrats in 2021 at risk, though recently passed redistricting regulations in Ohio mean the map cannot be unilaterally passed by Republicans, even if the final outcome will likely favor Republicans.

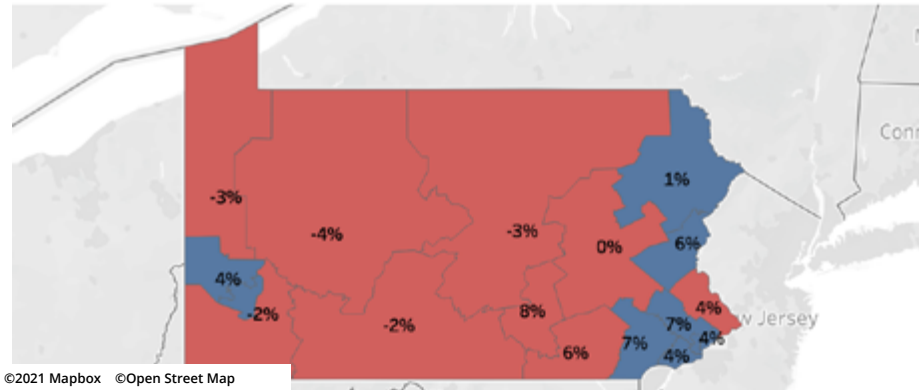


Population change since 2010 by CD in Ohio

■ Key Trend #2: Growing Communities Shift The Congressional Balance of Power

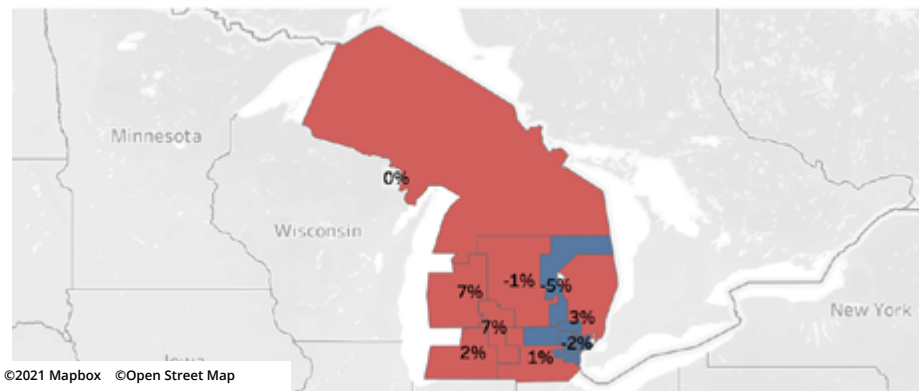
A divided government in Pennsylvania is dictating the redistricting process but a considerable 44 districts saw shrinking populations over the past decade, essentially making it unclear which party will benefit from eliminating one district from the wide part of the state outside of Philadelphia's south east region.

Population change since 2010 by CD in Pennsylvania



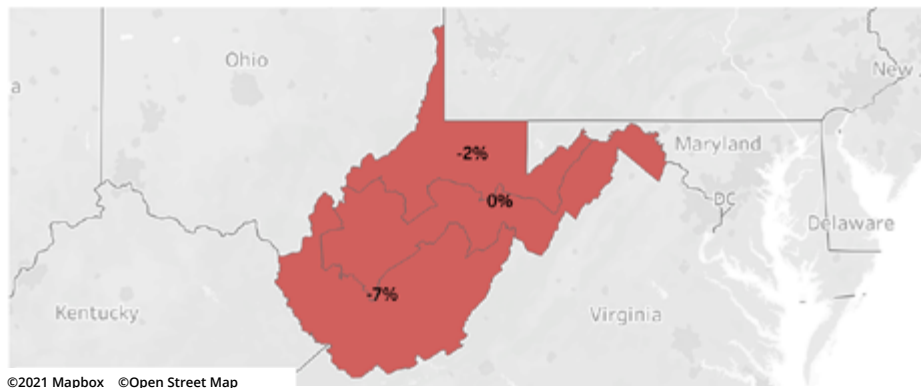
Michigan is using an independent commission for the first time to decide where to eliminate a seat but economic trends over the past decade have meant areas around Detroit and Flint, Michigan have seen the highest population declines. Democrats hold a sizable number of seats in the Detroit and Flint areas, and though one Democratic seat on the eastern side of the state could be eliminated, the newly drawn map could be more favorable to Democrats elsewhere.

Population change since 2010 by CD in Michigan



■ Key Trend #2: Growing Communities Shift The Congressional Balance of Power

Lastly, all three of West Virginia's districts in 2021 are held by Republicans, meaning the Republican trifecta in the state will pass a new map ousting one incumbent after the highest population decline of any state in the nation over the past decade.



Population change since 2010 by CD in West Virginia

Ultimately, new lines in states which are losing or gaining seats do not take into account new maps in the 31 other states. However, changes or potential changes in states with the highest shifts in population point to the difficulties of navigating political trends while contending with the fact that Americans continue to exit rural communities and condense into cities and the suburbs.

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3

Key Trend #3:

**A More Inclusive
American Mainstream**

Demographers have long estimated that the United States will become a majority-minority country by 2050. By that year, the racial and ethnic minority population will outnumber the white population for the first time. One way of viewing the 2020 Census data is that this demographic transition is coming faster than we think. In the decade between 2010 and 2020, the country’s white population declined in raw numbers for the first time, and posted a substantial loss in percentage terms, going from 63.7 percent to 57.8 percent.

This loss was bigger than most experts expected. According to the Census’s 2019 population estimates, the white share of the population stood at 60 percent. The actual number posted by the 2020 Census was two full points below that.

	2010 Decennial Census	2019 American Community Survey	2020 Decennial Census	Change from 2010	2020 Census - 2019 ACS Difference	<i>U.S. Population Share by Race and Ethnicity, 2010-2020</i>
White Alone, Not Hispanic	63.7%	60.0%	57.8%	-5.9%	-2.2%	
Hispanic or Latino	16.3%	18.4%	18.7%	+2.4%	+0.3%	
Black Alone	12.2%	12.8%	12.1%	-0.2%	-0.7%	
API Alone	4.8%	5.9%	6.1%	+1.3%	+0.2%	
Native and Other	2.9%	3.0%	5.3%	2.4%	+2.3%	

Sources: 2010 Decennial Census, 2020 Decennial Census, and 2019 American Community Survey (ACS)

The loss of whites’ majority status — and the decline in political and cultural power that comes with it — has been used as an explanation for the rise of Donald Trump and anxiety about immigration and racial “replacement.” According to a Pew study, nearly one third, 31 percent of Americans believe that the population becoming majority-minority is a bad thing, while 22% believe it is a good thing, and 61% think it is neither good nor bad. Among Republicans, the numbers are more weighted towards people who think it is bad, though more Republicans think this development is neither good nor bad.³

There is no questioning the fact that the U.S. is less white than it used to be, but at least when it comes to the most recent Decennial Census figures, there is more to this rapid decline than meets the eye. This is because of changes to the Census questionnaire designed to record more detail about the ethnic background of respondents. The

³ Krogstad, J. M., Dunn, A., & Passel, J. S. (2021, August 23). Most Americans say the declining share of White people in the U.S. is neither good nor bad for society. Pew Research Center. Retrieved September 30, 2021, from <https://www.pewresearch.org/fact-tank/2021/08/23/most-americans-say-the-declining-share-of-white-people-in-the-u-s-is-neither-good-nor-bad-for-society/>.

■ Key Trend #3: A More Inclusive American Mainstream

changes had the effect of reducing the share of the population that was either white or Black, and increasing the share that is multi-racial.

In fact, nearly all of the 2-point miss in the white share of the population is balanced out by a 2-point increase, over and above 2019 estimates, in the population that is of two or more races. This shift is entirely explained by the Census' methodological change, which for the first time asked both white and Black respondents to explain more about their ethnic origins.⁴

Sample question
from the 2020
Census form

7. What is this person's race?
Mark one or more boxes **AND** print origins.

White – Print, for example, German, Irish, English, Italian, Lebanese, Egyptian, etc. ↴

Black or African Am. – Print, for example, African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc. ↴

These responses were then coded by Census Bureau. In cases where the open-ended response revealed origins of a different race, the respondent was coded as being of two or more races.

The story of the 2020 Census is not that of a white majority that is being “replaced,” in the view of some conservative commentators, but one that is becoming increasingly blended with other races. In fact, this methodological change says less about future trends than it does about the fact that the existing level of racial and ethnic mixing has been far more significant than previously believed.

From 2010 to 2020, in raw numbers, the population of those of two or more races who were not Hispanic⁵ increased from 5.97 million in 2010 to 13.5 million in 2020, an 127% increase. The rate of increase was higher among the adult population, at 171%, than it was among the population under 18, at 76%, revealing that much of the increase was

⁴ Those of Native origin or of Two or More Races had been asked to specify their origins on the 2010 Census form and again in 2020. Asian respondents were asked to mark checkboxes with their specific ethnicity (Chinese, Vietnamese, etc.), or an open-ended field if the appropriate answer did not appear.

⁵ Pursuant to Office of Management and Budget regulations, the U.S. Census records Hispanic or Latino ethnicity in a different question from race. Hispanics have raised many questions about how they should answer this question, since many consider being Hispanic to be a race. Previously, a majority had answered that they are white, but Hispanics can also be Black, as evidenced by the growing Afro-Latino population from places like the Dominican Republic and Puerto Rico. In 2020, more of those who said they had Hispanic or Latino heritage answered that they were of “some other race” on the race question, likely an indicator for those who believe that their race is Hispanic is their race but who did not see it on the Census form. Whether due to coding changes on the part of the Census Bureau or how Hispanics filled out the Census form, a very high share of Hispanics are recorded as being of two or more races — usually a combination of white and some other race. The majority of these are likely to be of people whose background is purely Hispanic, as opposed to those who are the product of a marriage between white and Hispanic parents. It is impossible to distinguish between these two types of people based on Census data. Elevating Hispanic or Latino to a racial category was proposed for the 2020 Census, but rejected by the Trump Administration. While the question of whether Hispanics should be counted as their own race is in flux, it is quite possible that the Census could give them their own standalone racial category by 2030.

simply a revelation of decades-old familial mixing among the parents or other ancestors of the adult population. America's racial reality was already much more complex than we had previously known, something only revealed by the Census's changes.

Even without changing Census definitions of what counts as multi-racial, America's racial future is growing more and more mixed year after year. This can be seen most clearly in America's children, who are increasingly born to parents of different racial backgrounds. According to a Pew Research Census analysis of Census data in 2015, 14 percent of newborn children under the age of one were multi-racial and multi-ethnic, an increase from 10 percent in the year 2000 and 5 percent in 1980.⁶ According to the most recent Decennial Census numbers, the share of the non-Hispanic population under the age of 18 has nearly doubled in the last 10 years — from 3.8 percent to 6.7 percent. The share of all U.S. marriages that are interracial or interethnic is increasing by around 2 percent every decade, and is now at 11 percent or more.⁷ The share of new marriages that are interracial or interethnic stood at 17 percent in 2015 and could soon be more than one in five new marriages. The children that are a product of these couplings will represent a larger share of their generation than either Hispanics or Blacks are of the overall population today.

The rise of this new multi-racial generation could change how we think about race in America. For many, race is not a fixed category but a continuous spectrum. And for many individuals, one's own identity is fluid, subject to varying interpretations at different points in time. Researchers who have obtained anonymized individual Census records found that one in eight people who have ever answered that they are Hispanic on a Census form have answered that they are not Hispanic at one point or another. Growing numbers of Americans don't consistently identify as one race. Many take pride in a multi-racial identity, while for others, their own racial identity is fluid, changing over time. The fact that racial lines are not as hard as they once were could serve to lessen racial divides in America, even as other divisions increase.

Political Shifts and Racial Depolarization

One way the racial divide is diminishing is in how we vote. In its place, education is becoming more of a political dividing line. Today, race determines less than it used to about whether one votes Democratic or Republican, and whether one has a college degree determines more. Race still has a considerable impact on voting preferences, but it has become less salient in elections since Barack Obama's presidency, as nonwhites vote somewhat more Republican and whites somewhat more Democratic. This is not to say that race is not a major issue in American political life. The murder of George Floyd and the protests over racial disparities in policing in 2020 show that is not the case. But the events of 2020 did not appear to be a major driver of voting behavior,

⁶ Livingston, G. (2017, June 6). The rise of multiracial and multiethnic babies in the U.S. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/fact-tank/2017/06/06/the-rise-of-multiracial-and-multiethnic-babies-in-the-u-s/>

⁷ Rico, B., Kreider, R. M., & Anderson, L. (2018, April 26). Examining Change in the Percent of Married-Couple Households that are Interracial and Interethnic: 2000 to 2012-2016. United States Census Bureau. Retrieved September 28, 2021, from <https://www.census.gov/content/dam/Census/library/working-papers/2018/demo/SEHSD-WP2018-11.pdf>.

at least in the direction expected by pundits. Donald Trump did slightly better among Black voters than he did in 2016 despite consistently receiving low marks in surveys for his handling of the protests. If anything, the decline in his approval ratings during this period was greater among whites than it was among Blacks.

The 2020 election brought a sharp improvement in Donald Trump's vote share among most nonwhite groups. Our own estimates show that Trump improved his net margin by 12 points among Hispanics, 6 points among Asian Americans and Pacific Islanders, and 3 points among Blacks. In some cases, the shifts were much greater, making a significant difference in battleground states. Trump benefited from a 25-point margin shift in Miami-Dade County, Florida — heavily Hispanic and home to many Cuban-Americans, helping secure a victory in a must-win state for him. In the most heavily Hispanic precincts along the Rio Grande River in Texas, where upwards of 90 percent of voters were Hispanic, Trump improved his margins by 32 points, and in precincts with a similar share of Hispanics elsewhere in Texas by 20 points.⁸ Without these shifts, this traditional Republican bastion would have been very close to voting Democratic for the first time since 1976.

At the same time, Republicans lost ground from 2016 and 2020 among white voters, specifically white voters without a college degree, a group that shifted by an estimated 11 points towards Joe Biden. For someone who stoked numerous racial controversies as a candidate and as President, the irony is that Donald Trump left the Republican Party better off among nonwhite voters than when he found it — and worse off among white voters. Progressive election analyst David Shor has called this “the largest decrease in racial polarization in decades.”⁹

Republicans have needed to make up ground among racial minorities, and the party hopes that 2020's gains are the start of a long-term trend, and not specific to Trump. According to the exit polls, Mitt Romney won just 17 percent of nonwhite voters in 2012. This improved to an estimated 21 percent for Trump in 2016 and 26 percent for Trump in 2020. Part of this shift can be explained by changes to the internal composition of the nonwhite electorate; it is growing less Black and more Hispanic and Asian, two groups that lean Democratic but less decidedly than Black voters. But the Democratic advantage within each component group has also narrowed in both the 2016 and 2020 elections.

A Less Racially Divided Country

One possible explanation of narrowing political polarization by race is that nonwhites in America are becoming socially and geographically less distinct from whites. For generations, white was America's racial default. Throughout much of the 20th Century,

⁸ Echelon Insights analysis of Texas precinct data collected from the New York Times (2020) and MIT Election Data and Science Lab (2016).

⁹ Shor, D. (2021, February 3). Thought it'd be interesting to update this graph with the past five years of Data. since 2012, white voters have BECOME ~3.5% more democratic and non-white voters have become ~3.8% more Republican. Trump presided over the largest decrease in racial polarization in DECADES! <https://t.co/zyXEJ2lGnp> pic.twitter.com/11YRq8FYAm. Twitter. Retrieved September 28, 2021, from <https://twitter.com/davidshor/status/1357063375679860736?lang=en>.

whites made up more than 80 percent of the population.¹⁰ Segregation — *de facto* or *de jure* — was imposed upon the Black population. Immigrants of different races, primarily Hispanic and Asian, were a smaller share of the population and seldom citizens who could vote. On top of legal inequality and physical separation, racial minorities had much lower incomes and pursued higher education at lower rates, gaps that have narrowed but persist to this day.

While America still has a long way to go before the effects of racism are erased, there is no doubt we have made at least some progress toward creating a more just and equal country. We are seeing this in the fact that Americans of different racial backgrounds are starting to live together in the same neighborhoods, breaking down the old barriers of segregation. Measures of racial segregation calculated by the Urban Institute shows improvements in every time period measured since 1980.¹¹ The rate of improvement is slowing — residential segregation declined an average of 2.3 percent per year from 2012 to 2016 compared to 4.6 percent annually in the decade earlier — but the trend has been consistent and long-lasting.

Spatially, this means that we are seeing more nonwhites move from segregated enclaves into majority-white suburbs. The most rapidly diversifying parts of America in the last decade have been some of the whitest, including rural areas, small towns, and outer suburbs. In the last decade, we have also seen increasing “gentrification” of urban neighborhoods by whites. Americans of different races are now living in closer proximity to one another than they have before in recent history. When younger people of different backgrounds live more closely together, that makes it easier for them to form families together, which will drive further growth in the multi-racial population.

Politically, these changes are fueling two different trends. The first is the trend outlined previously towards growing Democratic strength in suburban areas adjacent to major cities. The second is a lessening of racial divides that may be serving to make the nonwhite population less Democratic as a whole, even if short-term migration patterns threaten Republicans’ hold on their former suburban strongholds.

Our analysis of voter file data finds that when Black and Hispanic voters live in less segregated communities, they tend to be less Democratic and more Independent and Republican, at least in states with party registration on the voter file. Their partisanship also closely tracks with the previous partisanship of the area overall, suggesting that newcomers tend to adopt the political norms of their neighbors.

Among Hispanics, income is closely associated with voting in a way that was true for whites in the 20th century but is no longer. Traditionally in Western countries, lower

¹⁰ Krogstad, J. M., Dunn, A., & Passel, J. S. (2021, August 23). Most Americans say the declining share of White people in the U.S. is neither good nor bad for society. Pew Research Center. <https://www.pewresearch.org/fact-tank/2021/08/23/most-americans-say-the-declining-share-of-white-people-in-the-u-s-is-neither-good-nor-bad-for-society/>

¹¹ Meixell, B., Stacy, C. P., & Hariharan, A. (2020, September 30). Residential Segregation Is Declining. How Can We Continue to Increase Inclusion? Urban Institute. Retrieved September 29, 2021, from <https://www.urban.org/urban-wire/residential-segregation-declining-how-can-we-continue-increase-inclusion>.

income voters have supported parties of the left and higher income voters parties of the right. That relationship no longer holds true in the United States, except among Hispanics.

According to the Cooperative Election Study, a recurring national survey of more than 50,000 voters crafted by a consortium of academics and administered by YouGov, Donald Trump received 40% of the vote among Hispanics with an annual income greater than \$120,000, as compared to 28% among those with incomes lower than \$50,000.¹² Higher Hispanic incomes are also associated with living outside of cities, which in itself is an indicator of stronger Republican support. While the lower-income Hispanic group currently outnumbers the higher-income group, these numbers are changing. Research by a group of scholars led by Harvard economist Raj Chetty¹³, using anonymized individual data from the Internal Revenue Service, finds that Hispanics are rapidly closing the income gap with whites, following the pattern of previous immigrant groups who started out poor and prospered more over time. At least for the time being, rising income and suburbanization point to an Hispanic electorate that should be more competitive for both parties than it is now.

Echoes of the Immigrant Past

The story of people of radically different backgrounds coming together is not unknown in America. The early waves of immigration to the United States posed a similar set of questions about who was and wasn't part of the mainstream. The new arrivals from countries like Ireland and Italy were often seen as a subversive influence and not recognized as part of the American mainstream, which was then understood to be white and Protestant.

The mixing process was not really complete until the 20th Century, as the descendants of 19th and early 20th century immigrants began to marry members of other ethnic groups and served side by side with ethnically diverse groups of other Americans in two World Wars. The aftermath of World War II sparked waves of internal migrations, including that of Blacks from the South to the North, and mass suburbanization. The net result was that communities were not organized as rigidly along old ethnic lines. In 1960, a religious milestone was broken when an Irish Catholic was elected President.

The process by which European immigrants became accepted into the "mainstream" of America was slow, and also excluded Black Americans and other minorities. Though by no means perfect, a more inclusive version of this history is unfolding today, as people of different races form families together, live together in the same communities, see rising incomes and economic opportunities, and are more politically competitive between the major parties.

¹² Echelon Insights analysis of Cooperative Election Study data, accessible at <https://dataverse.harvard.edu/dataset.xhtml?persistentId=doi%3A10.7910/DVN/E9N6PH>

¹³ Chetty, R., Hendren, N., Jones, M. R., & Porter, S. R. (2019, December 26). Race and Economic Opportunity in the United States: an Intergenerational Perspective. Oxford Academic. Retrieved September 28, 2021, from <https://academic.oup.com/qje/article/135/2/711/5687353>.

A large, light blue number '4' is centered on the page. The background features abstract geometric shapes: an orange shape in the top-left corner and a dark blue shape in the bottom-right corner, both with fine, parallel lines.

Key Trend #4:

**Millennials + Gen Z On
a Collision Course with
the Baby Boomers**

Half of America's population is part of the Millennial generation, Generation Z, or is part of the even younger yet-unnamed generation that comes after them. Millennials, so named due to their generation's coming of age in the new millennium, represent an estimated 22 percent of the U.S. population as of 2019. Generation Z, those born between 1996 and 2012, represent 21 percent of all US residents, and the yet unnamed generation to follow comprises seven percent of the population. These generations are driving growth in many of America's fastest-growing areas and their political influence is likely to grow as more register to vote and run for office.

At the same time, the United States is an aging society. Labels such as "Millennial" may bring to mind an image of a young adult, but the reality is that the oldest Millennials are turning forty this year. While the United States is slightly below OECD average in terms of its ratio of senior citizens (those aged 65 and older) per 100 working age people, projections suggest that the US will continue aging and by 2060 will have roughly one senior for every two working-age residents.¹⁴

The United States is likely to be less afflicted by the challenges of an aging population than many other OECD nations, in part because the proportion of Americans that are elderly is slightly lower and because fertility rates remain slightly higher in the US.¹⁵ Nevertheless, fertility rates in the United States have fallen in the last decade. While in 2010, each American woman had on average 1.93 children, by 2019 that figure had fallen to 1.71. Millennials and Generation Z are also delaying or eschewing childbearing compared to older generations, with 62 percent of Americans under age 35 having no children, a sharp increase from 2010 when only 55 percent of adults under age 35 had no children.

There are a number of long-term challenges awaiting today's Millennials and those in Generation Z that will place greater and greater pressure on these generations as they age and take on more responsibility in society. From climate change, to the rising national debt, to spending on social safety net programs, it will fall to those born after 1980 to navigate a potentially difficult landscape.

Growing the population may be one way for society to manage some of these issues and counter the challenges aging societies face. For example, boosting the fertility rate and shoring up the ratio of working-age adults for each elderly resident would help prolong the solvency of social safety net programs aimed at seniors such as Social Security and Medicare. However, other challenges such as climate change may be discouraging some young people from childbearing *at all*. In our September 2021 survey for KAS, among those under age 30 without children who said they did not think they wanted children in the future, the top worry about having children was climate change and environmental concerns (61 percent), right alongside concern about the cost of raising children (60 percent), both far outpacing concerns about lifestyle (45 percent) and career effects (34 percent). (However, among those under 30

¹⁴ Jones, K. (2020, February 12). These countries are aging the fastest - here's what it will mean. World Economic Forum. Retrieved September 28, 2021, from <https://www.weforum.org/agenda/2020/02/ageing-global-population>.

¹⁵ OECD. (n.d.). Fertility rates. OECD. Retrieved September 28, 2021, from <https://data.oecd.org/pop/fertility-rates.htm#indicator-chart>.

who already had at least one child but did not wish to have any more, climate change was much lower on the list of reasons given, eclipsed by worries about costs and accessing childcare.)

The oldest Millennials will be entering the prime of their careers right around the time that many of these slow-motion crises are projected to have major consequences. The United States' Social Security trust is presently expected to become insolvent in 2033, a trend that was accelerated by the coronavirus pandemic pushing more Americans into retirement and shrinking the workforce.¹⁶ Around that same time, current climate projections suggest even with reductions in emissions, global warming of 1.5 C will have occurred, and under intermediate scenarios proposed by the IPCC will reach 2.0 C by the time the oldest Millennials reach retirement age themselves.

The influence of the Millennial generation and Generation Z will only grow as these generations amass more economic power, enter the primes of their careers, and increase their ranks in influential roles in government, business, and culture. Millennials and Generation Z made up nearly one third of all votes cast in the 2020 presidential election, and their ranks in the U.S. Congress have grown from the first lone Millennial elected to Congress in 2008 to 31 members of the U.S. House and a member of the United States Senate in newly-elected Georgia Sen. Jon Ossoff.¹⁷

Millennial and Generation Z influence is likely to increase as their move to urban metroplexes is reflected in more Congressional representation for denser areas. The Census Bureau's reapportionment data does not currently include detailed information about age, but the 2019 estimates shed light on where Millennials and Generation Z are living – and where they are moving. At a regional or state level, the proportion of resident population born between 1981 and 2012 does not follow a consistent pattern state-by-state, and the top ten states in terms of proportion of the population under 40 includes a mix of “red states” and “blue states”, states from different regions, large and small states, as well as densely populated cities and suburbs versus more rural areas. While some Millennial-heavy states like Colorado and Texas picked up additional Congressional seats, others such as California and New York will lose one apiece.

But as noted earlier in this report, the new Census data suggests a decline in America's rural population and a move to cities and denser suburbs. This represents a shift toward areas more likely to have Millennial residents. Between 2010 and 2019, Millennials declined as a share of the population in rural areas and slightly edged down as a percentage of people living in the suburbs, while increasing as a proportion of those living in urban areas. America's rural areas are aging while denser areas are adding Millennials. When new Congressional district lines are drawn, the power of rural areas in Congress is likely to be diminished and denser areas favored by Millennials will have greater influence.

¹⁶ Singletary, M. (2021, September 4). COVID took one year off the financial life of the social Security retirement fund. The Washington Post. Retrieved September 28, 2021, from <https://www.washingtonpost.com/business/2021/09/03/social-security-insolvency/>.

¹⁷ Blazina, C., & DeSilver, D. (2021, February 12). Boomers, Silents still have most seats in Congress, though number of Millennials, Gen Xers is up slightly. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/fact-tank/2021/02/12/boomers-silents-still-have-most-seats-in-congress-though-number-of-millennials-gen-xers-is-up-slightly/>.

But even as Millennials and Generation Z rise in power and influence, the shadow of the Baby Boomer generation still looms large. Millennials cast nearly a third of all ballots in the 2020 election, and yet they hold less than ten percent of all seats in Congress. And even as the proportion of votes cast by those under the age of 35 has increased over the last decade, so too has the proportion of votes cast by those over the age of 65.

Two things are simultaneously true: Millennials and Generation Z are rising in influence, and America remains an aging country with an aging electorate. Younger generations will expect greater power and representation but nevertheless find themselves limited in their ability to influence policy and elections, even as they age and participate in elections in greater numbers both as voters and candidates. At the same time that the Baby Boomers will continue to hold on to the reins of power in many sectors, the gap between these younger generations and the Baby Boomers in terms of viewpoints and attitudes will also have an impact on both political parties, as they grapple with the challenges of this emergent generational divide.

The Birth of the Generation Gap

The arrival of the Millennial generation into the American electorate marked the emergence of a gap between older and younger Americans that had not existed in the decades before. Despite the stereotype that young people are always progressive and become conservative with age, for most of the 1980s and 1990s there was little gap between young and old voters in terms of presidential preference.

In 1980, according to exit polls that year, voters under the age of 30 were split evenly between Ronald Reagan and Jimmy Carter in the election for President. The 1984 election showed Reagan winning every age group, with negligible differences between voters young and old. George H. W. Bush won 53 percent of voters under age 30 in 1988 compared to 51 percent of voters over age 60. The Clinton years are more complicated to parse due to the influence of third-party candidate Ross Perot, but the differences in vote share for Clinton are rather small between young and old in both 1992 and 1996. By 2000, the Bush versus Gore election had again erased any generational divide.

The lack of a clash between young and old at the ballot box during the 1980s and 1990s makes the entrance of the Millennials to the electorate and its ripple effects all the more pronounced. In 2004, voters under age thirty — of which some were young Generation Xers and some were old Millennials — broke for John Kerry by a nine-point margin while majorities in all other voter groups preferred to re-elect George W. Bush. In the 2008 election, voters under age 30 — at that point, a mostly-Millennial group — broke for Barack Obama by a two-to-one margin, while seniors leaned toward McCain by eight points.

For much of the last decade, this sort of pattern has generally held, and **as Millennials have aged they have tended to bring their political leanings along with them.** They

remained a solidly Democratic group in 2012, breaking for Obama by a twenty-three point margin even as seniors preferred Mitt Romney by a twelve-point margin. In 2016, Democratic candidate Hillary Clinton maintained the nearly twenty-point margin over her Republican opponent Donald Trump with the youngest voters, and also won over voters in the age 30-44 group by a ten point margin, a wider margin than Obama had won that age group by four years earlier, as Millennials aging up into a new exit polling age band made its mark. In the 2020 election, Pew Research Center estimated that President Joe Biden won Millennials and Generation Z each by a twenty point margin.

Millennials are not shifting to the right very much as they age, and Generation Z is coming behind them with mostly progressive or left-of-center political views. Younger Americans are likely to shift the country to the left on a range of issues, both cultural and economic. However, their political impact has been somewhat muted by the fact that older voters are not fading as a proportion of the electorate. Millennials and Generation Z are rising but the Baby Boomers are not stepping aside to make room.

What is clear from polling data is that Millennials and Generation Z take a very different view from their elders on issues such as race, gender, and climate change. According to the Pew Research Center, Millennials and Generation Z alike are more likely to believe that climate change is happening and is driven by mankind's activities, more likely to know someone who uses gender-neutral pronouns, and are more likely to believe that racial inequality remains a major problem in America.¹⁸

On cultural issues, young Americans generally continue to trend leftward. But even on issues of economics and size of government, the more progressive views Millennials held in their 20's appear to be sticking around. In 2008, voters aged 18-29 overwhelmingly said they felt government should do more to solve problems, while older voters in their 30s were relatively split on this question.¹⁹ As those Millennials aged, they preserved their preference for more active government, and a decade later in 2019, still 64 percent said they preferred more active government.²⁰

It seems less likely that Millennials and Generation Z will come to adopt Baby Boomers' views on issues. In fact, in some arenas, Baby Boomers have followed the Millennials' lead. For instance, the views on gay marriage held by Millennials during the start of the Obama presidency were a window into where senior citizens would stand a decade later. According to the Pew Research Center, in 2009, 51% of Millennials supported same-sex marriage, compared to only 32% of Baby Boomers; by 2019, fully 51% of Baby Boomers supported same-sex marriage.²¹

18 Parker, K., & Igielnik, R. (2021, July 14). On the Cusp of Adulthood and Facing an Uncertain Future: What We Know About Gen Z So Far. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/social-trends/2020/05/14/on-the-cusp-of-adulthood-and-facing-an-uncertain-future-what-we-know-about-gen-z-so-far-2/>.

19 Rosentiel, T. (2020, May 30). Young Voters in the 2008 Election. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/2008/11/13/young-voters-in-the-2008-election/>.

20 Parker, K., & Igielnik, R. (2021, July 14). On the Cusp of Adulthood and Facing an Uncertain Future: What We Know About Gen Z So Far. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/social-trends/2020/05/14/on-the-cusp-of-adulthood-and-facing-an-uncertain-future-what-we-know-about-gen-z-so-far-2/>.

21 Pew Research Center. (2020, May 30). Attitudes on Same-Sex Marriage. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewforum.org/2006/07/26/public-opinion-trends-on-gay-marriage/>.

Millennials and Gen Z in the Parties

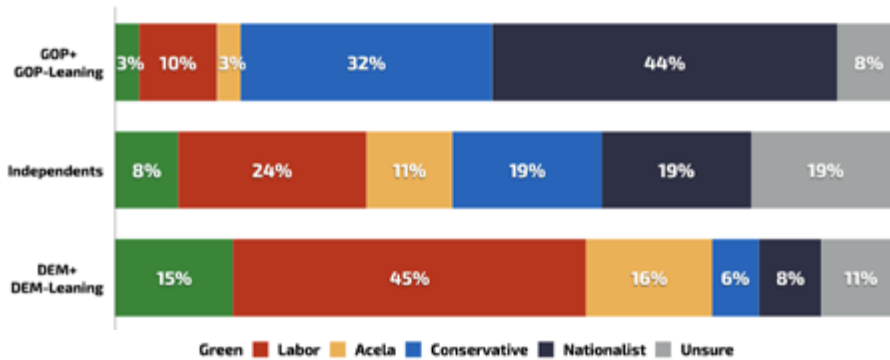
What is also important to understand for the long view is the way the generations will affect the development and evolution of America's two major political parties. In the shorter run, because the Democratic coalition has a larger proportion of Millennials and Generation Z, it may be the party where the influence of these generations emerges first. However, on the Republican side, some of the divides over issues such as race and climate are more pronounced along generational lines than within the Democratic party, suggesting the GOP will have internal generational clashes of its own to grapple with in coming years.

Younger voters play a larger role in the Democratic coalition than in the Republicans'. In the 2016 presidential primary, when both parties had competitive primaries, exit polls in key states showed voters under age 40 making up a larger share of Democratic primary voters than Republican primary voters by sizable margins. For instance, only 20 percent of South Carolina Republican primary voters were under the age of 40, compared to 28 percent of voters in that state's Democratic primary the same year. But despite being the "younger" party, their elected representatives in Washington and party leadership have tended to be older, setting the stage for tense intergenerational party conflict.²²

When presented with options beyond the traditional American two-party system, the Democratic party as a whole leans toward preferring a center-left "Labor" style party. In Echelon Insights surveys, we find that by a three-to-one margin, Democrats as a whole prefer a party that looks more like a "Labor" party — described as a party supporting middle-class economic security, a social safety net, and modest redistribution — than like a "Green" party, which in our survey was described as a party pursuing bold climate policies as well as economic and social justice initiatives. Yet at the same time, we find Millennials and Generation Z more divided, with one in five members of Generation Z overall saying they would prefer a "Green" style party. Furthermore, a large portion of Democrats who are part of Generation Z also express interest in a classical-liberal style party. While the vast majority of older Democrats are quite happy with a Labor-style party, younger Democrats have a wide array of views of what their party ought to be in the future and clashes between emerging young progressive leaders and their party's aging leadership are not likely to cease any time soon.

²² Blazina, C., & DeSilver, D. (2021, February 12). Boomers, Silents still have most seats in Congress, though number of Millennials, Gen Xers is up slightly. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/fact-tank/2021/02/12/boomers-silents-still-have-most-seats-in-congress-though-number-of-millennials-gen-xers-is-up-slightly/>.

Key Trend #4: Millennials + Gen Z On a Collision Course with the Baby Boomers

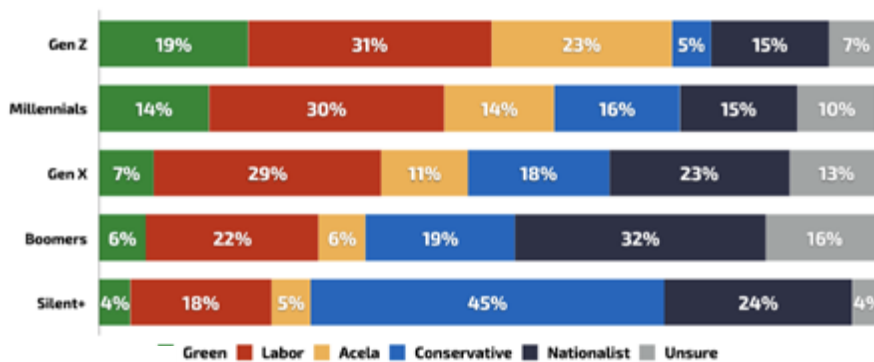


Nationalist Party Wins Among GOP, Labor With Democrats



30

The generational divide on the Republican side, meanwhile, looks a bit different. Republicans are by and large interested in either a center-right traditional conservative style party or are interested in a more populist and nationalist “America First” style right-wing party. Between those two options, they lean toward preferring a more populist vision for the party, a dynamic that persists even among Republicans under age 40. Overall, Republicans lean slightly more in favor of a populist party (44 percent) compared to a more traditional center-right party (32 percent), and this is a similar breakdown among young people who select one of the two right-of-center options, with right-leaning Millennials split between those two visions and right-leaning Generation Z’ers leaning more heavily toward the populist vision.²³



Only 20% of Gen Z Would Support A Center-Right Party

Gen X More Divided from the Left and Right



34

²³ Echelon Insights. (2021, July 7). June 2021 Verified Voter Omnibus - Quadrants. <https://echeloninsights.com/in-the-news/june-omnibus-quadrants/>



■ Key Trend #4: Millennials + Gen Z On a Collision Course with the Baby Boomers

The dividing factor isn't that younger Republicans will clash with their party elders over the more populist direction the party has taken in recent years. Indeed, as Republicans have seen some young people depart the party during the Trump era, the young people who remain are those who are more bought into the populist-nationalist vision the Trump era represented. Rather, on issues such as race and climate, it is the Republican Party rather than the Democratic Party where generational gaps are more pronounced. Generation Z Republicans are much more likely than their party elders to think that racial injustice is an issue, an issue where there is effectively no generation gap within the Democratic Party. Young Republicans are also much more likely to believe climate change is a problem and to support more aggressive policies to combat it compared to their party elders.²⁴

Millennials and Generation Z on the right and the left are likely to drive their parties in a direction that is both more culturally progressive and more populist and anti-establishment in posture. They will push their parties to think about issues like race, gender, and climate in new ways. But in the short run, they will be stymied in their efforts to do so by the fact that America is still aging and the Baby Boomers will retain significant control and influence for the next decade. We expect this clash of generations to become ever more pronounced, particularly as the consequences of generational challenges like fiscal issues and climate change begin to intensify.

²⁴ Funk, C., & Tyson, A. (2020, June 24). Millennial and Gen Z Republicans stand out from their elders on climate and energy issues. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/fact-tank/2020/06/24/millennial-and-gen-z-republicans-stand-out-from-their-elders-on-climate-and-energy-issues/>.

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Key Trend #5:

**The Culture War
Reshapes the
Republican Party**

When the Democratic Party last had unified control of the Presidency and Congress, in 2009 and 2010, the Republican Party's instinct was to fight back on economic ground. Barack Obama had come into office in the wake of the September 2008 financial crisis. The Wall Street collapse had led to an unprecedented set of emergency measures by the outgoing administration of George W. Bush, including an \$800 billion Troubled Asset Relief Program that was derided by (primarily conservative) critics as a bailout for the same financial institutions that had created the crisis to begin with.

Upon assuming office in January 2009, Obama pursued a stimulus package totaling nearly \$800 billion and a bailout of the auto industry. Obama enjoyed a brief but lofty honeymoon, with initial approval ratings topping 65%.²⁵ One month later, every Republican in the House and Senate would vote against Obama's stimulus package.

Soon thereafter, the "Tea Party" opposition movement was born, as it would happen, on a trading floor, as CNBC reporter Rick Santelli railed on live television further bank bailouts on the floor of the Chicago Mercantile Exchange, calling for a "Chicago Tea Party." On Tax Day, April 15, Tea Party rallies were held not just in Chicago, but in cities and towns across America. Republicans were at a low ebb of power in Washington, down to 40 votes in the Senate, but they quickly rallied around opposition to deficits, high government spending, and further bailouts of big business. In the 2010 midterm elections, the Tea Party "wave" swept through Washington, with Republicans gaining 63 House seats and dislodging the last "Blue Dog" Democrats who held seats in the conservative South. One of the proposals at the forefront in the new Republican Congress was the "Path to Prosperity," Rep. Paul Ryan's plan to reform entitlements like Social Security and Medicare to make them more financially sustainable. Ryan's devotion to ideas and policy would eventually earn him a spot on Mitt Romney's ticket and a role as Speaker of the House, although his ideas fell victim to the political reality that changes to entitlement programs are highly unpopular with the most committed voters: senior citizens. Nonetheless, the rise of Paul Ryan was an example of the extent to which Republicans circa 2010 and 2011 were willing to put limits to government spending at the forefront of their agenda.

Late in his term, Donald Trump faced just as momentous a crisis as Bush or Obama faced in 2008 and 2009, as the coronavirus pandemic spread to the United States and local governments quickly imposed stay-at-home orders that would shut down large sectors of the economy. Congress came together in a bipartisan manner to pass the CARES Act, which provided broadly targeted stimulus checks and a Paycheck Protection Program for businesses to continue paying employees. A second round of stimulus would be passed in the fall of 2020, followed by a third round under Joe Biden which attracted Republican support in both the House and Senate.

While Washington continues to be highly polarized between Democrats and Republicans, the Republican Party's differing responses to these two crises shows how much has changed in the party before and after Donald Trump. Limited government was not

²⁵ RealClearPolitics - President Obama Job Approval. (n.d.). RealClearPolitics. Retrieved September 29, 2021, from https://www.realclearpolitics.com/epolls/other/president_obama_job_approval-1044.html

central to the Trump agenda — whether the establishment flavor of it promoted by Ryan or the libertarianism of Ron and Rand Paul. In its place, Trump put tougher trade policies and immigration control center stage in an appeal to the “forgotten” American worker.

While Trump’s economic policies did affirm Republican orthodoxy in key ways, particularly the tax reform legislation passed in 2018 or in cutting federal regulations, Trump consciously branded himself as a populist champion sympathetic to everyday workers in a way that the more business-oriented Republicans of before could not.

What enabled Trump to connect to this important segment of the electorate was his realization that they were far more concerned about the perceived loss of what made America unique than they were about the specifics of tax policy.

Political debates have long been divided into an economic and a social dimension. The economic debate has centered around questions like the size and scope of government or how much we should tax the wealthy. They consume policy debates in Washington, where livelihoods revolve around the allocation of resources in the Federal budget. The social dimension has traditionally revolved around moral and religious issues, like abortion, gay rights, or religious freedom. Trump was largely silent on these issues, having taken left-of-center positions on them earlier in his career. But Trump discovered a new cultural dimension largely untapped by Republican leaders, centered around the question of *who we should be as a country*. The issues that define this dimension are less moral and religious than they are about American culture and identity: controlling the borders, not teaching American schoolchildren that they live in a racist country, standing for the national anthem and calling out athletes who don’t, affirming that America is at heart a capitalist and not a socialist country.

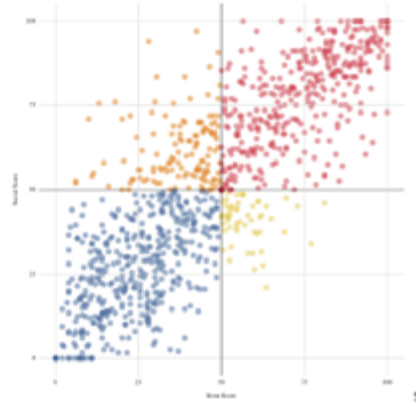
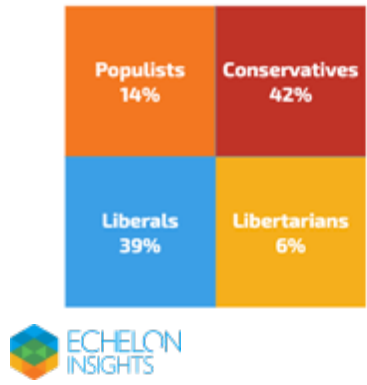
When the debate is framed in this way, American public opinion is culturally to the right and economically to the left. In a representative survey of 1,000 registered voters nationally, we posed 10 questions on both these cultural and economic dimensions. We then coded each respondent as economically and culturally left or right on both dimensions based on their responses to the questions. The results in our sample found that Americans are 56 percent culturally conservative (to 44 percent culturally liberal) and 52 percent economically liberal (to 48 percent economically conservative).

Individuals can then be divided into quadrants based on where they stand on both economic and cultural questions. Roughly 8 in 10 voters are ideologically consistent; that is, they are conservative or liberal both on economics and culture. Consistent conservatives are 42 percent of the electorate and consistent liberals are 39 percent. But two groups are conflicted: Populists, who are culturally conservative and economically liberal at 14 percent of the electorate, and Libertarians, who are culturally liberal and economically conservative, at 6 percent.²⁶

²⁶ Echelon Insights. (2021, July 7). June 2021 Verified Voter Omnibus - Quadrants. <https://echeloninsights.com/in-the-news/june-omnibus-quadrants/>

■ Key Trend #5: The Culture War Reshapes the Republican Party

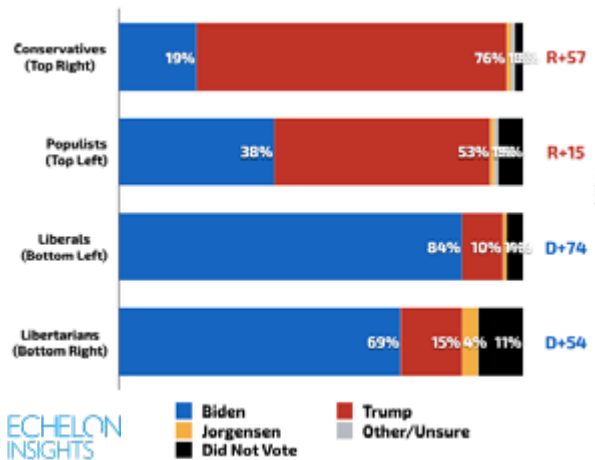
Culturally Conservative and Economically Liberal Votes are 14% of Electorate



It is in these two conflicted quadrants where a large share of swing voters live. And in these groups, there is more of an advantage to be had by being culturally conservative than economically conservative.

Predictably, both Conservatives and Liberals voted in lopsided form for Trump and Biden respectively. But the results among Populists

and Libertarians are telling. The larger Populist grouping voted narrowly for Trump, by 53 to 38 percent. The smaller Libertarian grouping voted close to the Liberals, by 69 to 15 percent for Biden. When one's cultural and economic views are split, cultural issues usually drive who one will vote for.



The New Cultural Battleground

Of course, talking broadly of economic and cultural issues tells us little about which specific topics political leaders would do best to campaign on to attract the most potential support. Within each of these categories are issues where the right's argument outperforms the left's, and vice versa. On cultural issues, the right is strongest on appeals to pride in America (where 62% of voters agree with the statement that America is the greatest country in the world to 28% who say it is not), on whether transgender athletes should play on sports teams that match their gender at birth (56 percent, to 29 percent who say their current gender), fully funding the budget

for police departments (56 percent, to 35 percent for reducing them), and immigration (53 percent for increasing border security and enforcement, to 38 percent for making it easier to immigrate legally). The left also wins some culture war debates, like whether gay marriage should be legal (62 percent say it should, 28 percent say it shouldn't), whether abortion should be all or mostly legal (56 percent, to 34 percent who say it should be all or mostly illegal), and in believing that there are still obstacles to women's equality (54 percent, to 38 percent who say that those obstacles are largely gone).

On the economy, there are fewer places where conservatives command a clear majority. More people agree with a values-based statement that most people can still get ahead if they work hard (57 percent, versus 38 percent who say hard work and determination are no guarantee of success). The right's argument is also favored on the idea that some people being rich and others poor is an acceptable part of our economic system (51 percent, to 41 percent for the left's argument that this is a problem that needs to be fixed). But there are numerous issues on which the economic left wins by large margins: raising taxes on the wealthy (60 to 30 percent), shoring up Social Security and Medicare with tax increases (49 percent) over benefit cuts (33 percent), in thinking that environmental regulations are worth the cost (51 to 37 percent), and it being the Federal government's responsibility to provide citizens with health care (52 to 39 percent). The overall picture is that of a country closely divided on these economic questions, but leaning left.

It is no surprise that Joe Biden has tried to steer the debate in the first year of his Administration towards economic issues, including further rounds of stimulus checks (at a level initially proposed by Donald Trump) and large Federal investments in infrastructure and social services. It is also no surprise how Republicans have responded, which has been to narrow the divide on economic issues while offering full-throated opposition along the cultural dimension. In contrast to the Obama stimulus, Republicans provided some votes in favor of Biden's first stimulus bill and have cooperated with him on an infrastructure package. The centerpiece of their opposition to his first year has been on immigration, and specifically the crisis at the southern border, an issue on which the public disapproves of Joe Biden's performance. On these cultural divides, Republicans are completely united, while different voices within the party advance their own ideas on economic policy.

Indeed, many within the conservative movement are calling for an open break with big business. As Washington grows more polarized and dysfunctional, large corporations often feel pressure, from employees and activists, to take stands on public policy issues. More often than not, these stands anger those on the political right, such as Major League Baseball's decision to move the All-Star Game from Atlanta over a Georgia voting law, or mandating COVID-19 vaccination for employees. Republican lawmakers have spoken out roundly against "woke capitalism" and have directed particular attention to large technology companies, like Facebook and Twitter, whom they believe silence conservative users at the behest of largely liberal employee bases. For some on the right, including Missouri Senator Josh Hawley, this extends to a newfound openness to antitrust enforcement, especially against technology

companies. This is both a new front in the broader battle for American culture and an attempt to carry forward Donald Trump's emphasis on appealing to the American worker, swearing off the party's image as a tribune for the wealthy and big business.

Culture Redefines the Republican Electorate

The emphasis on cultural issues has also redefined politics within the parties, especially the Republican Party. For many, what's at stake in politics is much greater than a simple disagreement between two parties over the right solutions to problems. It's a war for the survival of America.

In our national survey taken just a few weeks after the events of January 6, 2021, we asked registered voters what they thought politics was about: ensuring the survival of the country as we know it, or enacting good public policy. Voters were equally split, 38 to 38 percent between these two options. Republicans were more likely to say that politics was a battle for survival, by a margin of 46 to 25 percent. But Democrats did not entirely disagree with the proposition either: 38 percent said politics was about ensuring the survival of the country as we know it, to 47 percent who said it was about enacting good public policy.²⁷

A further divide was found within the Republican Party. Among Republicans who considered themselves first and foremost supporters of Donald Trump, more than twice as many respondents said the survival of the country was the priority over good policy, by 51 to 19 percent. Republicans who considered themselves first and foremost supporters of the party (over Trump) were more evenly split, with "survival" leading "policy" by 41 to 31 percent.

For these Americans, the heightened stakes of politics demands politicians who will "fight," regardless of the cost. This is what initially drew Republican primary voters to Trump, more than any specific attachment to his policies. It was no surprise that when we followed up with Republicans the next month, the number one attribute they said they were looking for in a Republican primary candidate was that they "won't back down in a fight with the Democrats," with 49 percent saying this was "absolutely essential" to their vote. By contrast, just 22 percent said that being "the most conservative person running" was absolutely essential to their vote.²⁸

What do Republican voters want their political leaders to fight for them about? Mostly, the issues they want to see addressed are cultural in nature. In this same February survey, we gave both Republicans and Democrats a tailored list of more than 20 issues, some overlapping between the two groups, but mostly tailored to the issues being discussed within the parties.

²⁷ Echelon Insights. (2021, February 2). January 2021 Verified Voter Omnibus - Impeachment & Election. <https://echeloninsights.com/in-the-news/january-omnibus-impeachment-election/>

²⁸ Echelon Insights. (2021, February 24). February 2021 Verified Voter Omnibus - Party Concerns. <https://echeloninsights.com/in-the-news/february-omnibus-party-concerns/>

The issues that Republicans most said they were extremely concerned about were lack of support for the police, illegal immigration, liberal bias in the mainstream media, socialism, and general moral decline. Among Democrats, we found the highest level of concerns expressed about Donald Trump’s supporters, white nationalism, the spread of COVID-19 infections, domestic terrorism, and systemic racism. (Certainly, many of the Democratic responses were colored by the recent memory of January 6th.)

Ranking lower on the list of Republican concerns — at least expressed in terms of the most intense feeling that they were extremely concerned about this as a problem for the country are economic issues, with 51% saying they were extremely concerned about the economic damage of COVID-19 and 50% saying the same about high taxes, and cultural issues that were at the center of national debates in the 1980s and 1990s, with 50% saying they were extremely concerned about legal abortion in the third trimester and 38% saying this about discrimination against Christians, less than any other issue tested.

The overall intensity of concern across all the issues tested was lower on the Democratic side, but was centered heavily on Donald Trump’s rejection of the 2020 election results and racism more than it was on economic issues like income inequality, the economic damage of COVID-19, access to health care, or student loan debt.

Top Republican Voter Concerns
% saying *Extremely Concerned*

Lack of support for the police	59%
Illegal immigration	59%
Liberal bias in the mainstream media	57%
Socialism	55%
General moral decline of the country	53%

Top Democratic Voter Concerns
% saying *Extremely Concerned*

Donald Trump’s supporters	57%
White nationalism	54%
The spread of COVID-19 infections	52%
Domestic terrorism	48%
Systemic racism	47%

SOURCE: Echelon Insights, February 2021 Verified Voter Omnibus

The Culture War Isn’t Going Away

Political leaders in the Trump era have newly rediscovered the staying power of culture as a political question. This never went away, but in recent years was subsumed by the preferences of the political leaders themselves, who preferred a debate focused on the size and scope of the Federal government. After all, the budget was something a politician could do something about if elected.



■ Key Trend #5: The Culture War Reshapes the Republican Party

As it turns out, the voters didn't care about these questions as deeply. And politicians on the right, led by Donald Trump, also discovered that there was an untapped market of voters who were economically to the left or indifferent, but to the right on cultural questions. So they set about targeting them in a way that Republicans in the Tea Party period did only indirectly, throwing in attacks on big business and immigration control in a broader push for lower taxes and limited government. Trump cast aside the push for limited government and made virtually all political debate revolve around questions of American national identity.

Whether we can be said to be in a post-Trump period or not, Republicans are following his example. Leading the Republican polls if Trump does not run in 2024, is Florida Gov. Ron DeSantis, who has styled himself as a Trump-like "fighter" against COVID-19 restrictions and efforts to teach critical race theory in public schools.

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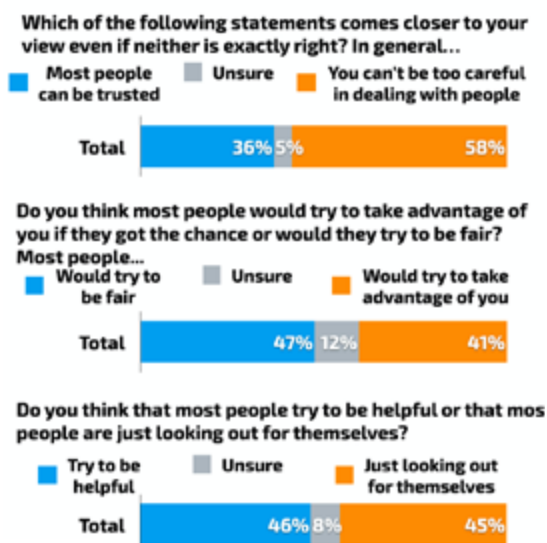
Key Trend #6:

**Social Trust Erodes
as Polarization and
Fear Rise**

■ Key Trend #6: Social Trust Erodes as Polarization and Fear Rise

In the wake of a divisive election and a global pandemic, Americans are growing more negative toward those of the opposite political party — also known as rising affective polarization. Divides and disputes between Republicans and Democrats are not merely about disagreements over policy but over whether or not the other party presents a grave threat to the country. In the lead-up to the 2020 election, nearly one third of Trump voters and over half of Biden voters said they would feel “angry” if the other party’s candidate was victorious.²⁹ On both sides, nine out of ten said that the other party winning the election would not merely be concerning but would lead to lasting harm for the country. And this polarization is not merely for the voters and the adults: research has found affective polarization trickling down to teenagers and adolescents, a worrisome finding that suggests even as a new generation enters the electorate we may not see a break in our polarization.³⁰

Americans are growing more negative toward those of the opposite political party



correlated to partisanship, social trust is a valuable indicator of the long-term ability of a nation to come together for a common purpose.

Echelon Insights tested measures of social trust among a national sample of registered voters to identify demographic drivers and relationships between social trust and trust in institutions. We find a majority of voters (58%) say you can't be too careful in dealing with people, compared to 36% who say most people can be trusted, but voters are more divided on whether others have negative intent. 47% say most people try to be fair versus 41% who say most people would try to take advantage of you, and 46% say

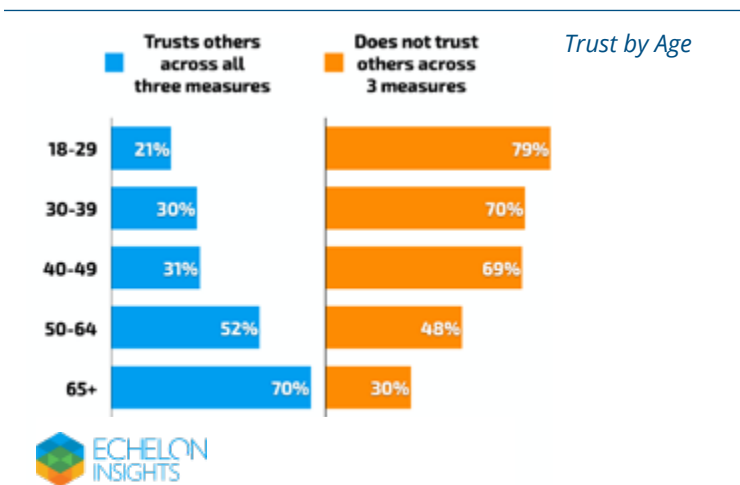
As the United States and the world faced unprecedented levels of turbulence over the past few years, the importance of social trust — the ability for citizens to have faith in honesty, integrity, and reliability of others — has never been more important. The ability to execute effective national solutions to shared crises is reliant on stable and secure democracies. Democracies, in turn, are built on strong communities, and the strength or erosion of social trust between citizens has significant implications for trust in political institutions and unity when working towards shared goals. As matters such as vaccination and faith in elections become

²⁹ Pew Research Center. (2020, October 9). *Voters' feelings about the election and possible outcomes*. Pew Research Center. Retrieved September 30, 2021, from <https://www.pewresearch.org/politics/2020/10/09/voters-feelings-about-the-election-and-possible-outcomes/>.

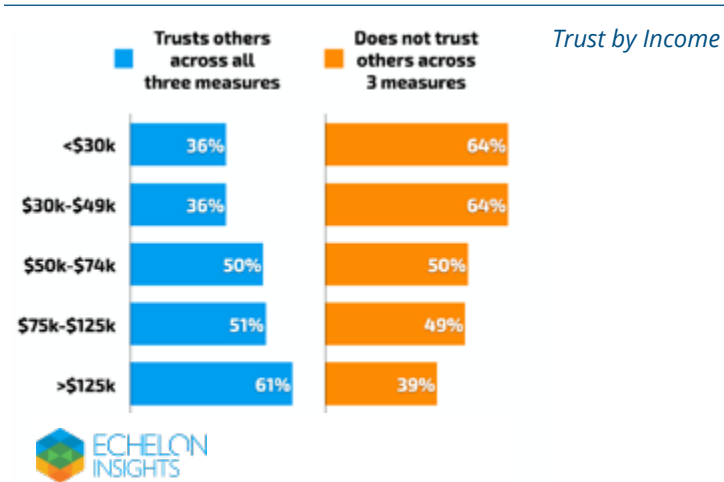
³⁰ Iyengar, S., & Tyler, M. (2021). Learning to Dislike Your Opponents: Political Socialization in the Era of Polarization. *Democracy and Polarization Lab, Stanford University*, 1–15. https://doi.org/https://www.dropbox.com/s/5go8ja0519vwhfx/Socialization_and_Polarization_maintext.pdf?dl=0

most people try to be helpful versus 45% who say most people are just looking out for themselves.³¹

In general, men are more likely to be trusting than women, minority voters have the lowest levels of social trust, and social trust steadily increases with age, income, and education. Just 21% of voters under 30 say they are likely to trust others across all three measures tested and this steadily increases to 70% of voters 65+ who trust others across all three measures. Similarly, 36% of lower income voters say they trust others across all three measures, which increases to 61% who trust others across all tested measures.³²



Critically, despite widespread discourse pinning partisan extremism as responsible for eroding social trust, approximately equal proportions of Republicans and Democrats say they trust most people. Though more Republicans (41%) say most people can be trusted instead of you can't be too careful in dealing with people than Democrats (34%), nearly equal proportions of Republicans and Democrats say most people try to be fair (49% of Republicans, 47% of Democrats), and nearly equal proportions say most people try to be helpful rather than most people are just looking out for themselves (49% of Republicans, 46% of Democrats).³³

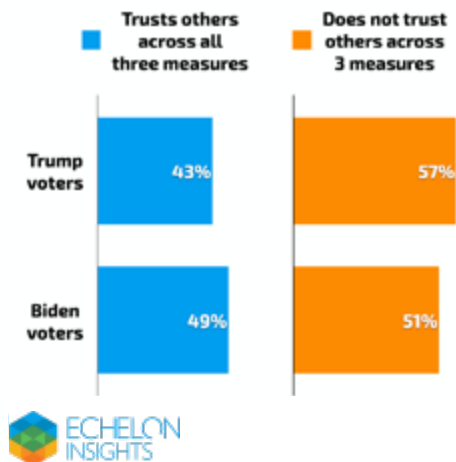


Nearly equal proportions of voters in both parties are likely to answer that they trust others across all three social trust measures (48% of Republicans and 47% of Democrats always say they trust others), and nearly equal proportions say they do not trust others across all three social trust measures (52% of Republicans and 53% of

31 Echelon Insights. (2021, September 24). September 2021 Verified Voter Omnibus
 32 Echelon Insights. (2021, September 24). September 2021 Verified Voter Omnibus
 33 Echelon Insights. (2021, September 24). September 2021 Verified Voter Omnibus

■ Key Trend #6: Social Trust Erodes as Polarization and Fear Rise

Trust by 2020 Presidential Vote



Democrats always say they do not trust others). The widest partisan gap turns up on alignment with Donald Trump rather than basic party identification: 57% of Trump voters always say they do not trust others, compared to 51% of Biden voters.³⁴

Further, Echelon's study confirms that lower levels of social trust correlate directly to lower levels of trust in institutions. Voters who answered that they are less likely to trust others across all three measures are also less likely to say they trust public health

organizations, and both Democratic and Republican leaders. However, a majority of lower trust voters still say they have a great deal of trust or some trust in public health organizations, and more trust people in their local community than "Most people." The distance between trust in specific groups among lower trust voters and higher trust voters is especially wide when considering corporations or business leaders: majorities of high trust voters say they have a great deal of trust or some trust in business leaders and corporations, whereas just 27% of low trust voters say the same about business leaders and 21% of low trust voters say the same about large corporations.³⁵

Lower levels of social trust correlate directly to lower levels of trust in institutions



34 Echelon Insights. (2021, September 24). September 2021 Verified Voter Omnibus
 35 Echelon Insights. (2021, September 24). September 2021 Verified Voter Omnibus

Ultimately, this data confirms that lower levels of social trust strongly correlates with lower levels of trust in institutions, and majorities may be acting with caution around others. Voters are divided on whether most people are acting with good intentions, and no strong majorities of American voters say they trust most people to be fair or helpful. However, these perceptions of most other people cut across party lines, with only measurably lower trust among more populist voters. At the moment, social trust appears to increase with age, education, and income, and the relative consensus on trust in public health organizations may point to the considerable influence ongoing current events can have on social trust. While lower levels of social trust may erode faith in leaders and institutions, these factors are not static and can be bolstered by events and efforts to further unify countries and communities.

The implications of this dynamic are significant for the health of the populace and the health of democracy. When it comes to health matters, nearly half of those surveyed by Echelon Insights who had no intention of getting a COVID-19 vaccination said it was because they did not trust the information they had heard about the vaccine, making it the most commonly cited reason of the options provided.³⁶

For the health of democracy, social trust is key and declining social trust more heavily concentrated in one party can have significant consequences. At the moment, lower levels of social trust are more acutely seen on the political right. Therefore, it is perhaps unsurprising that we saw a sharp increase in lack of trust in elections among Republicans in the immediate wake of the 2020 election, a feeling that persisted even in the months that followed Election Day.³⁷

Underlying many of the top-level trends we see around division, polarization, and the politicization of institutions is an erosion of a key foundation: social trust. As Americans question the intentions of their neighbors and fear their political adversaries, it is harder to marshal national unity in the face of crisis and raises concerns about the health of democratic institutions.

³⁶ Echelon Insights. (2021, September 24). September 2021 Verified Voter Omnibus

³⁷ Griffin, R., & Quasem, M. (2021, June 24). *Crisis of Confidence*. Democracy Fund Voter Study Group. Retrieved September 30, 2021, from <https://www.voter-studygroup.org/publication/crisis-of-confidence>.

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Key Trend #7:

**America Grapples With
Waning Influence and
Rising China**

Since the end of the Cold War and the fall of the Soviet Union, the United States has held the unique position of being the world's foremost major superpower. During the first decade of the 21st Century, American hegemony was relatively unchallenged by other nations and instead the greatest threats to America came from terrorists and other non-state actors. But at the same time the United States was adapting to being the sole hegemon, China was making different plans and looking far ahead. The end of the Cold War also brought with it Deng Xiaoping's strategy of opening up and growing China's economy while simultaneously embracing a "hide capabilities and bide time" policy, growing China's strength while avoiding escalating any tensions with the United States and other nations.³⁸

The turn of the decade saw a number of changes that upset that balance. The rise of Xi Jinping meant discarding "hide and bide" in favor of demonstrations of Chinese power globally. Meanwhile, bogged down by conflicts in Iraq and Afghanistan, the United States' role on the world stage also changed. Americans began to question whether those military engagements had been worth it, and still reeling from the financial crisis of 2007-2008, many began to believe turning inward was the best approach. As China was turning ever more outward and asserting more influence around the world, the United States was at risk of turning inward.

Meanwhile, Donald Trump scrambled the conventional wisdom about the politics behind American foreign policy. Breaking sharply with the foreign policy of George W. Bush and other past Republican leaders, Trump championed a policy of pulling back from the rest of the world except in instances where it was clearly in America's interests. The withdrawal from Afghanistan, now harshly condemned by leaders of the Republican Party for its poor execution, was nevertheless a move that had been pursued first by Trump. And while foreign policy was rarely a strong point in Trump's job approval ratings, that pattern has persisted with President Joe Biden, with only 43 percent of American voters approving of Biden's handling of foreign policy in our Echelon Insights' September 2021 national survey.³⁹

38 Doshi, R. (2019, January 22). Hu's to blame for China's foreign assertiveness? Brookings. Retrieved September 28, 2021, from <https://www.brookings.edu/articles/hu-to-blame-for-chinas-foreign-assertiveness/>.

39 Echelon Insights. (2021, September 24). September 2021 Verified Voter Omnibus - Political Update. <https://echeloninsights.com/in-the-news/september-omnibus-political/>.

Americans See Competition from China Rising

Americans feel their influence waning, though that alone is not a new trend. From the middle of the George W. Bush presidency through the next decade, Americans' views of their country's role in the world has fallen sharply, with nearly half saying they think the US is less powerful than it was a decade ago.⁴⁰ And ten years ago, according to the Pew Research Center, while most of Europe was already of the mind that China would overtake the U.S. in terms of global leadership, Americans were split over whether China would take the place of the United States as the world's leading superpower in the future.

At the time, however, even a majority (51 percent) of Americans as well as majorities in Britain and France felt favorably toward China.⁴¹ Ten years ago, to the extent there was concern that America's influence around the world was ebbing, this view was not paired with a sense of alarm or a desire for America to reassert itself strongly around the world. In the year leading up to the election of Donald Trump, it was Republicans more than Democrats who felt that the United States was doing too much around the world, and within the Republican Party it was Trump's most ardent supporters who were most likely to embrace this view.⁴²

At the time, it was Republicans who were most likely to say they wanted the U.S. to pull back from engagement around the world, but it was also younger Americans who were among the most ambivalent about waning American strength. While Americans over age 50 said — by a nearly two-to-one margin — that the U.S. should pursue policies that would keep it the world's military superpower, a majority of those under 30 said it would be acceptable if another country became as powerful as the United States. With American exceptionalism no longer something America's youngest generations embraced, a turn away from robust global engagement seemed to be something both young Americans and Trump Republicans would join together to support.

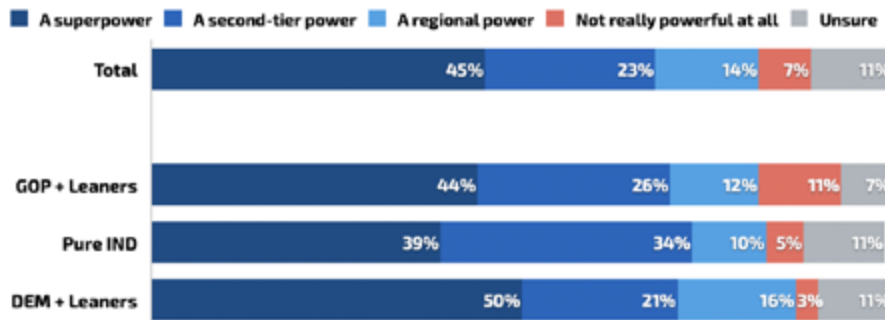
Five years later, that landscape looks quite different. The continued rise of China has thrown into sharp relief the perils of pulling back or accepting diminished American leadership around the globe. Republicans are increasingly concerned about a rising China and view it as a major threat to the United States. At the same time, Democrats as a whole are moderately concerned about China, but younger Americans' skepticism of the United States and relative lack of alarm about China may further widen the partisan gap around China in the years to come.

⁴⁰ Pew Research Center. (2016, May 5). *Perceptions of U.S. global power and respect*. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/politics/2016/05/05/8-perceptions-of-u-s-global-power-and-respect/>.

⁴¹ Pew Research Center. (2011, July 13). *China Seen Overtaking U.S. as Global Superpower*. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/global/2011/07/13/china-seen-overtaking-us-as-global-superpower/>.

⁴² Pew Research Center. (2016, May 5). *Widespread uncertainty about America's place in the world*. Pew Research Center. Retrieved September 28, 2021, from <https://www.pewresearch.org/politics/2016/05/05/1-america-s-global-role-u-s-superpower-status/>.

Q. Which of the following do you think best describes the United States' role in the world today?



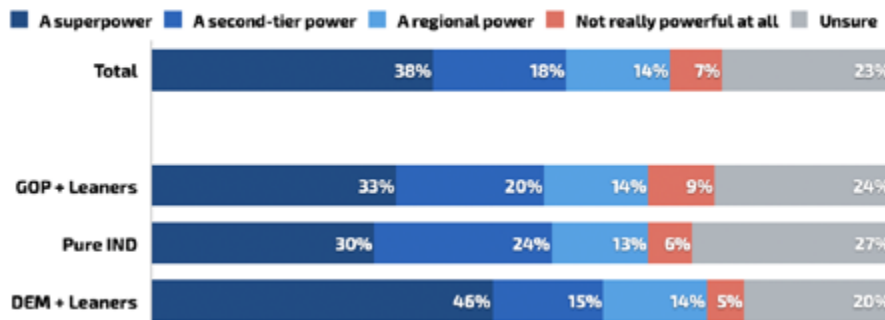
Belief in America's role in the world today



Americans believe that their influence is waning and that this will benefit China, but are divided over the extent to which this poses a significant threat. Only 45 percent of American voters believe that the United States is currently a superpower. And their expectations for the future are that this will decline; with only 38 percent thinking the United States will be a superpower in a decade. This is not necessarily because Americans are certain their country will be a regional or second-tier power, but rather because they are quite unsure about their nation's standing in the future.

When compared against perceptions of China's power, the two parties diverge in their assessments of America and China's relative standing — both today and in the future. Republicans largely believe that the United States and China are powerful today, but in the future China will remain powerful as the United States' influence wanes. Democrats, meanwhile, are more likely to view the United States as a superpower than China today and believe that a decade from now the two countries are equally likely to be powerful.

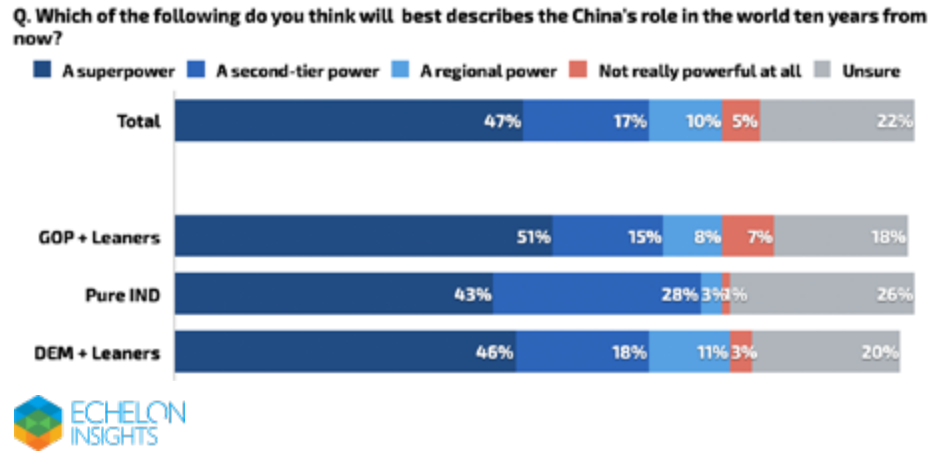
Q. Which of the following do you think will best describes the United States' role in the world ten years from now?



Belief in America's role in the world ten years from now



Belief in China's role in the world ten years from now



This difference in belief about relative present and future power is likely related to the two parties' differing views on the extent to which China poses a threat to the United States and whether countering China's rising influence ought to be a priority.

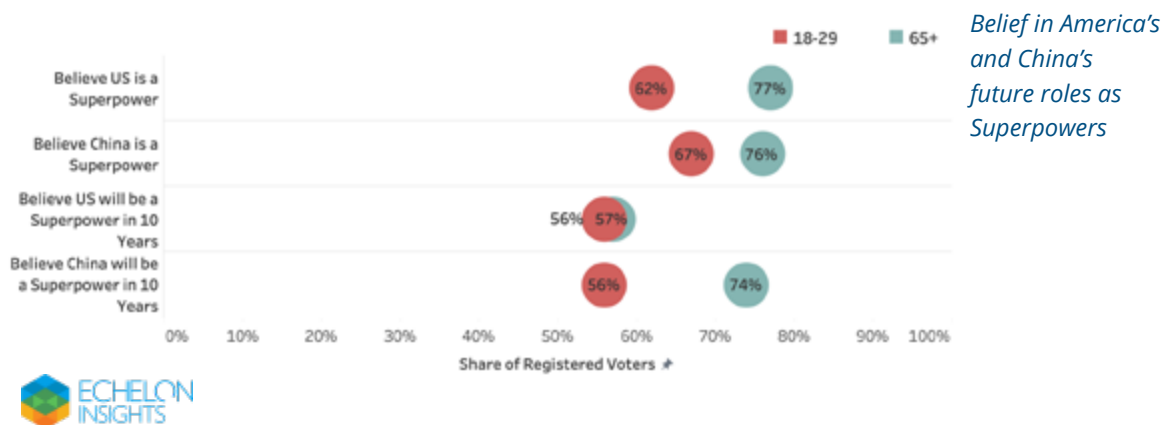
American voters broadly believe that rising Chinese power and influence are to some extent a problem for the U.S. Sixty percent of Americans believe countering a rising China should be a top or high priority for American foreign policy, about the same amount that think the U.S. should aim to counter radical Islam. And the notion that China poses a threat is bipartisan, with some 68 percent of Republicans and 57 percent of Democrats believing that countering Chinese influence should be a high priority.

But beneath that surface level bipartisan consensus is a wide difference in intensity of views. When it comes to China, Republicans express more intense alarm and worry much more about the consequences of a rising China. Among Republicans, some 38 percent believe that countering China ought to be *the very* top priority compared to only 25 percent of Democrats.

Republicans are also much more likely than Democrats to believe that rising Chinese power, both economic and military, makes the United States *much* worse off. While 57 percent of Republicans say that rising Chinese economic power makes us worse off, only 29 percent of Democrats say the same. The partisan gap closes slightly when discussing rising Chinese military power, with 60 percent of Republicans and 37 percent of Democrats saying that it makes the U.S. much worse off. Furthermore, half of Republicans say we are much worse off if China increases its influence in Latin America while less than a third of Democrats say the same. Half of Republicans say we would be much worse off if China were to take control of Taiwan militarily, while less than half of Democrats say we would be worse off *at all* and only 28 percent think we would be much worse off.

But these partisan divides are in some ways quite minor compared to the major generation gaps that emerge on whether China is a threat — and what the United States ought to do about it. **Older Americans believe America should be a world leader and worry we are losing that position to China. Younger Americans are not as sure the U.S. should be the world’s leader and at the same time are less persuaded that we will lose ground.**

Younger Americans are in general much less concerned about China as a threat. When asked if they think China and the US are superpowers, only one-third of Generation Z and Millennial voters view America as a superpower today, and they hold the same view of China. Meanwhile, a majority of American senior citizen voters think each *are* in fact superpowers. But when looking ahead ten years, senior citizens believe that the United States is likely to fall from superpower status while China rises significantly, while younger Americans are actually *more* likely to think the United States will be a superpower in a decade.



As a result, younger Americans are less likely to think they will be worse off if China’s influence increases — particularly Chinese economic influence.

When it comes to military strength, while half of those under 30 do say they believe growing Chinese military strength would make the United States worse off, only a quarter think it would make America *much* worse off. This stands in stark contrast to the views of older Americans who express significant and potent concern about China’s military. And when discussing economic strength, only 39 percent of those under age 30 and less than half of those under age 40 believe that increasing Chinese economic strength makes the US worse off; fully a quarter of those under age 30 believe rising Chinese economic strength actually benefits the United States. This is dramatically different from the views of older Americans, among whom over seven in ten say that Chinese economic strength is a problem.

■ Key Trend #7: America Grapples With Waning Influence and Rising China

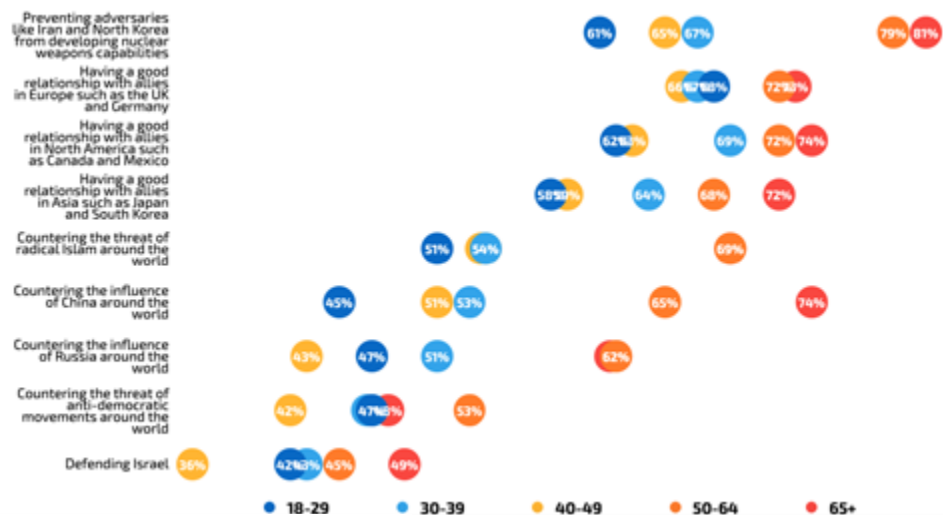
Furthermore, Chinese influence in Africa or Latin America is viewed very negatively by older Americans, while younger Americans do not think it makes much of a difference or even makes the United States *better off*. Even the issue of Taiwan is met with something of a shrug by young Americans, with only a quarter of Americans under age 40 thinking the United States would be much worse off if China took control of Taiwan militarily.

When Americans are asked what they believe our priorities should be in terms of foreign policy, countering China is the most polarizing along generational lines. But at the same time, the least polarizing issue along generational lines is the transatlantic relationship.

Americans Of All Types Want Good Relations with Europe

In Echelon Insights' survey research for KAS, Americans were asked how much of a priority a variety of foreign policy objectives should be for the United States. At the top of the list overall was nuclear nonproliferation, specifically preventing Iran and North Korea from developing nuclear weapons capabilities. But these concerns were also somewhat divisive by age; while this was clear top concern for voters over age 50, voters under age 50 had a different top priority: having a good relationship with allies in Europe. In fact, not only are good transatlantic relations the top priority for Americans under age 50, the matter is considered slightly more important than even our relationships with North American neighbors and allies in Asia. While there may be generational disagreement about to what extent and how we should be engaged in Asia, the transatlantic relationship is more unifying.

Belief in priority of foreign policy objectives for the United States



Global pollster YouGov surveyed Americans and found that of the fourteen of Americans' twenty most positively-viewed nations are European countries, a finding that also applies specifically to Millennials.⁴³ (Meanwhile, though the United States is the most positively-viewed nation for Baby Boomers and members of Generation X, the United States is only fifth place among Millennials.) For almost a decade, research has shown Millennials are more interested in global travel than previous generations.⁴⁴

It seems likely that Americans will remain eager to preserve the transatlantic relationship, even as there are deep disagreements over other facets of foreign policy. The ties that bind the United States and Europe are considered important to Americans across a wide range of demographic divides.

As the United States pulls back from Afghanistan and the world wonders whether or not American leadership on the world stage will wane, there are certainly items in this research that suggest Americans place limits on how and where they wish to exercise U.S. power and influence abroad. In our research, items like countering the threat of anti-democratic movements around the world garners a more middling response. While it is also true that foreign policy has not been a top issue for American voters in nearly a decade and a half, and true that Americans are reconsidering their role in the world a bit in the two decades since 9/11, preserving positive relationships with allied countries is very much valued by voters and will be important as the United States aims to maintain global influence while countering a rising China.

⁴³ YouGov. (n.d.). *The Most Popular Countries* (Q2 2021). YouGov. Retrieved September 28, 2021, from <https://today.yougov.com/ratings/travel/popularity/countries/millennials>.

⁴⁴ Machado, A. (2014, June 18). *How Millennials Are Changing Travel*. The Atlantic. Retrieved September 28, 2021, from <https://www.theatlantic.com/international/archive/2014/06/how-millennials-are-changing-international-travel/373007/>.

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Kristen Soltis Anderson is a pollster, speaker, commentator, and author of *The Selfie Vote: Where Millennials Are Leading America (And How Republicans Can Keep Up)*. For over a decade and a half, she has worked in the public opinion research industry. In 2014, she co-founded Echelon Insights, an opinion research and analytics firm that serves brands, trade associations, nonprofits, and political clients.

She hosts a weekly radio show on SiriusXM called “The Trendline” and she writes a weekly newsletter, *Codebook*. She has been a contributor to ABC News and Fox News Channel, and has appeared on numerous programs such as *Meet The Press*, *The Daily Show*, and *Real Time With Bill Maher*.

In 2013, Kristen was named one of TIME’s “30 Under 30 Changing The World”, and in 2016 she was named one of ELLE’s “Most Compelling Women in Washington.” She regularly speaks at prominent events like the Aspen Ideas Festival and Wall Street Journal CEO Forum. She has served as a Resident Fellow at Harvard’s Institute of Politics. She is a graduate of the University of Florida and Johns Hopkins University.



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Over the last two decades, Patrick Ruffini has advanced the digital and data-driven transformation of politics in numerous roles, most recently as the co-founder of Echelon Insights, a next-generation polling, analytics, and intelligence firm.

Ruffini began his career as one of the country’s first political-digital practitioners, starting at the Republican National Committee in 2002. He managed grassroots technology and outreach for President George W. Bush’s 2004 re-election campaign, and returned to the RNC to run digital strategy in 2006. Ruffini would go on to found Engage, one of the country’s leading right-of-center digital agencies, advising candidates nationally and internationally and members of the Fortune 50.

In 2014 he co-founded Echelon Insights to evolve the traditional ways that organizations collect information to drive strategy. Ruffini leads the firm’s analytics and technology practices, helping a wide array of clients craft more persuasive messages, manage crises, and reach audiences more cost-effectively.

Ruffini is writing a forthcoming book with Simon and Schuster on the multi-racial populist future of American politics. His perspectives on political and demographic trends are often highlighted in the national media, with pieces published by the Washington Post, Politico, and FiveThirtyEight. He has served as an adjunct professor of Political Science at Johns Hopkins University and is a graduate of the University of Pennsylvania.



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Kai Chen joined Echelon from the U.S. Global Leadership Coalition, where she coordinated outreach strategy to federal candidates in the 2018 Midterm Elections. In this role, she developed original elections analysis and conducted both long-term and rapid response research to support successful international affairs advocacy.

Kai Chen discovered her passion for political research during her undergraduate career when she supported an extensive research project on media frames around and public perceptions of immigration, while interning in the Capitol Hill office of Representative Bill Huizenga and with Amway’s DC-based Government Affairs office. Originally hailing from Michigan and New Jersey, Kai Chen graduated from the University of Michigan with a degree in Political Science and Eastern European Studies.

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