

The Structure of U.S. Two-Party Politics and the 2024 Election

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<Analysis Based on the Election Results>

The claim that Donald Trump's victory in this presidential election was a landslide is questionable. Trump secured 312 electoral votes, which, while a solid win, is not particularly impressive. For instance, few would describe Barack Obama's 2008 win with 365 electoral votes a landslide. In the popular vote, Trump's nationwide margin was less than 2%, and in Congress, the Republican victory in the House of Representatives was historically narrow.

Given the highly competitive nature of the two-party system today, it is inherently difficult to predict election outcomes with complete accuracy based on pre-election surveys. Even high-quality public opinion polls have a margin of error of several percentage points. Small shifts in voter preferences can lead to unexpected results.

Turning to an analysis of exit polls, one notable trend is the across-the-board increase in Republican support across most regions and demographics. This shift is attributed to factors such as high inflation and greater voter enthusiasm among Republicans compared to Democrats. In this context, two key groups deserve attention: the working class and non-white voters, particularly black and Hispanic populations.

Among black and Hispanic voters, the Republican vote share increased in both groups, with the shift being particularly pronounced among Hispanics compared to the previous presidential election. Regarding the working class—typically defined as individuals without a college degree—it is important to recognize that this is a broad categorization. While the majority of college-educated voters supported the Democratic Party, more than half of those without a college degree voted Republican, marking a significant increase from the previous election. This growing correlation between educational attainment and party preference is commonly referred to as the “diploma divide.”

However, it is worth noting that voters from union households—including those where the voter or a family member is a union member—were slightly more likely to support the Democratic Party. Looking at income levels, the once-clear correlation between income and partisanship—where lower-income voters tended to support Democrats and higher-income voters leaned Republican—was not as evident in this election.

Thus, while this election aligns with the broader trend of non-white and working-class voters shifting away from the Democratic Party, the overall increase in the Republican vote share makes it difficult to conclude definitively that this election represents a turning point in partisan politics.

The Nationwide Stalemate Between the Two Major Parties and Shifts in Their Support Bases

Since the 1970s, the two major parties in the United States has become increasingly ideologically polarized, with the Democratic Party leaning liberal and the Republican Party leaning conservative. Historically, American political parties have been loosely organized and weakly disciplined, lacking a single authoritative leader or a permanent platform. This structural weakness has made it difficult for both parties to unify around specific policy directions.

Over the past half-century, however, the two parties have entered an unprecedented phase of ideological opposition, where they diverge on nearly every major political issue. This polarization has deepened divisions and heightened emotional conflict not only between party leaders but also among their supporters.

Traditionally, the Democratic Party's support base has included the working class, non-white voters, low-income individuals, and women, while the Republican Party has drawn support from high-income earners, the business community, religious conservatives, and white men. While the Democratic Party has generally had an advantage in terms of overall voter support, the Republican Party has maintained strong backing from high-turnout groups such as older adults and high-income individuals.

Additionally, Republican voters spread out widely around the country including rural areas, which are overrepresented in the U.S. electoral system. This geographic advantage has helped maintain a competitive balance between the two parties in election outcomes, even when the Democratic Party have had more supporters overall.

Let us take a closer look at the characteristics of some key voting groups, starting with Hispanic and black voters. Both groups have historically endured severe discrimination, and since the mid-20th century, black voters have overwhelmingly leaned toward the Democratic Party, driven by its strong commitment to addressing racial inequality. Hispanics, whose population is projected to grow faster than most other demographic groups, have also leaned toward the Democratic Party, although to a lesser degree. It may seem surprising that Hispanics and black voters would support today's Republican Party, which is increasingly associated with discriminatory tendencies. However, the Democratic Party has had trouble effectively addressing discrimination.

Among black voters, there have been strong peer pressure to support Democrats, which seems to be weakening. Economically, both groups have a relatively large proportion of low-income individuals, which often leads to liberal inclinations. The situation, however, is different from a sociocultural perspective. Many Hispanics are Catholic, and as a result, a significant number take conservative positions on issues such as abortion. Among blacks, around 20% are either Catholic or evangelicals. Thus, there are certainly individuals within these groups who are ideologically conservative and inclined to support the Republican Party. In fact, the rise in Republican support among these groups is largely limited to self-claimed conservatives, with little notable change in the voting behavior of moderates or liberals.

On the other hand, the recent trend of the working class shifting away from the Democratic Party began in the late 20th century. This shift can be attributed to several factors, including the Democratic Party's move toward moderation by scaling back its economic liberalism, as well as the decline in unionization rates among labor unions that traditionally mobilized working-class support for the party.

However, as with non-white voters, it is difficult to envision the entire working class aligning with the Republican Party. Three key reasons support this argument.

First, the working class is highly diverse. While it constitutes a significant majority—accounting for 60% of the electorate—only about half of its members actually identify as working class. Second, regional and racial differences shape perspectives and influence the strength of labor unions, leading to variations in voting behavior between urban and rural working-class voters. Third, the increase in Republican support within the working class is particularly pronounced among white working-class voters.

Thus, while Republican support has risen among both the working class and non-white groups, this shift is primarily limited to individuals who share a stronger cultural or social affinity with the Republican Party, such as those with socially conservative views.

<The Politics and Policies of the Two Major Parties and Their Challenges>

The Democratic Party is broadly liberal on both economic and social issues. However, since Trump's rise, the party has become increasingly aware of its declining support among white working-class voters, leading its mainstream faction to lean toward moderation to secure electoral victories. This shift has caused friction between the mainstream and left-wing factions, the latter of which maintains a firmly liberal stance. Yet, the challenges facing today's Democratic Party—and liberalism more broadly—are more structural than ideological.

As liberals, the Democrats need to make use of government to achieve their political goals. However, under the competitive two-party politics, Republicans can easily obstruct Democratic initiatives, making it difficult for the party to deliver on its policy promises. As a result, the Democratic Party has struggled to achieve policy successes even with those that resonate widely with voters. Without tangible achievements, it must instead appeal to its ideals and goals—unintentionally amplifying the visibility of its left-wing faction in its course. This, in turn, invites criticism that the party is too extreme or unrealistic.

Additionally, as Trump promotes discriminatory and exclusionary rhetoric, sociocultural issues have become more prominent in political discourse, presenting further challenges for Democrats. While economic concerns traditionally take precedence for voters—and many Republican supporters actually hold economically liberal views—the heightened focus on sociocultural issues has made Democrats vulnerable to accusations that they prioritize women and non-white communities while neglecting others. In this election, Kamala Harris faced criticism for emphasizing women's and minority rights while offering vague economic policies. While this may have been a strategic misstep on her campaign's part, it should also be understood within the broader context of the structural difficulties liberals face today.

For the Republican Party, the situation is the opposite. Trump is credited with reshaping the party's image by advocating worker-friendly policies such as protectionism and infrastructure investment. However, while Trump did significantly raise tariffs, there has been little evidence of significant progress in infrastructure development. On economic policy, the Republican Party's conservative approach has largely remained unchanged. Core conservative economic policies—such as tax cuts

and deregulation—are easier to implement politically than the Democrats' redistributive measures and serve as tangible achievements. The major tax cuts enacted during Trump's previous administration, for example, primarily benefited high-income earners and the business community, creating a disconnect between the party's rhetoric and the economic interests of the working class.

In other words, while the Republican Party has sought to cultivate an image as a party for the working class, its policy direction has not fundamentally shifted to align with this portrayal. Political scientists Jacob Hacker and Paul Pierson describe the modern Republican Party as pursuing economic policies favoring high-income earners and the business community while simultaneously adopting discriminatory and exclusionary sociocultural stances to attract white working-class voters who resonate with such values. They term this strategy "plutocratic populism"—a characterization that holds considerable merit.

Given this, it is not accurate to describe the Democratic Party as the "party of the rich," as some recent discourse suggests. In terms of income distribution, there is no substantial difference between the two major parties' voter bases. In fact, the Republicans are more inclined to adopt policies that benefit high-income earners. While the Republican strategy proved effective in this election—where sociocultural issues took center stage—the economic disconnect with the working class could emerge as a vulnerability in the future.

Prospects for the Second Trump Administration

Trump's leadership style is distinctly populist, centered on attacking opposing forces as "evil establishment." While this approach is effective when challenging the political establishment, maintaining broad support once in power is a different challenge altogether. Unlike in his first term, Trump now exerts greater control over the Republican Party, making his internal party dynamics particularly noteworthy. Interestingly, post-election opinion polls indicate that many Republican supporters believe Trump's more extreme actions should be checked by Congress and other Republican politicians. This suggests that even among his base, loyalty to Trump is not absolute.

The future of American democracy is also a concern. Since the early 21st century, the Republican Party has increasingly resembled dominant ruling parties in authoritarian-leaning democracies like Turkey and Hungary. Today, it can be argued that the Republican Party poses a significant challenge to democratic norms. However, this does not mean that Trump's re-election would lead to an immediate suspension of the Constitution or the establishment of a dictatorship. Instead, contemporary democratic backsliding often occurs through the gradual erosion of norms and procedures via legal mechanisms, leading to the growing dominance of the governing party.

In this context, attention should also be given to state governments, where the Republicans now hold overwhelming majorities in more than half of U.S. states. If the Republicans consolidate power at the federal level, there is a legitimate concern that democratic safeguards could be weakened with little opposition.

(This is the English translation of an excerpt of the talk given by OKAYAMA Hiroshi, Professor of Keio University, which originally appeared on the e-Forum "Giron-Hyakushutsu" of GFJ on January 4, 2025.)