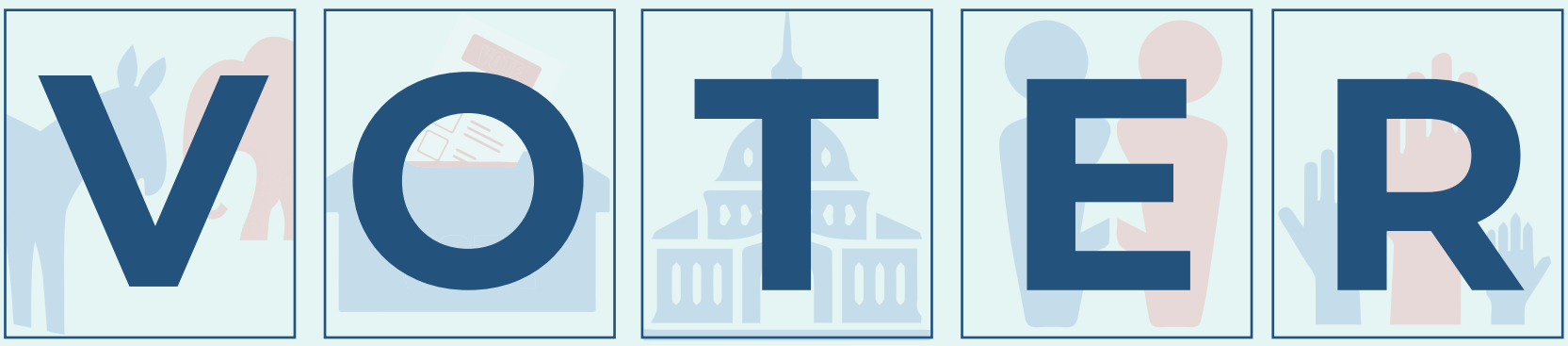
2024 PRIMARY ELECTION



LANDSCAPE

10 AI-POWERED SEGMENTS YOU NEED TO WIN

resonate

3 INTRODUCTION AND METHODOLOGY

5 MEET THE VOTERS

6 LEGACY LIBERALS

7 SOCIAL JUSTICE DEMOCRATS

8 GOTV DEMOCRATS

9 NEXTGEN CHANGEMAKERS

10 INFLUENCEABLE BYSTANDERS

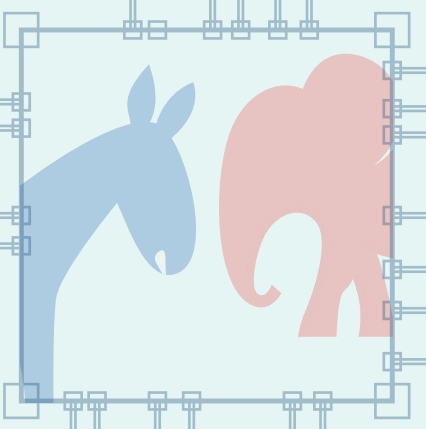
11 ISSUE-DRIVEN INFLUENCABLES

13 UNREGISTERED DISENGAGED VOICES

14 TRUMP-ET-EERS

15 AMERICA FIRST PATRIOTS

16 HOMEFRONT TRADITIONALISTS



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TARGET, ENGAGE & PERSUADE VOTERS ACROSS ALL CHANNELS

2024 is poised to be another unprecedented and unpredictable election cycle. There hasn't been a landslide election for the US president since Ronald Reagan won in 1984. In fact, in 2020, the margin was much smaller. President Biden got 51.3% of the votes compared to former President Trump's 46.8%. Third-party candidates picked up just 1.8%. With margins that slim, a few votes make a BIG difference. Now, with only Nikki Haley remaining up against Trump as we head into the primaries, the possibility of a Trump v. Biden rematch seems increasingly likely. Access to real-time, relevant data (and a lot of it) to determine which way voters are leaning and how they can be persuaded will be the key to success — and campaigns won't find it in traditional voter files.

At Resonate, we've identified **10 unique voter segments that campaigns and candidates will need heading into the 2024 primary election cycle.** To build this unique voter landscape, Resonate leverages its unparalled AI-data engine, rAI, which combines data from the nation's largest continuous voter survey, including questions related to today's most relevant political and policy issues, with behavioral data at scale. Machine-learning algorithms enable Resonate to yield thousands of individual-level insights on every eligible voter, from their party, policy positions, preferred voting method, psychological drivers, personal values and more. Lastly, Resonate uses AI **to cluster and segment the eligible electorate based on the most fundamental and relevant attributes to predict 2024 voting behavior.**

Resonate is a pioneer in AI-powered voter data, delivering best-in-class targeting and deep, real-time audience analysis. Our first-party research, segmentation builder, and managed programmatic media services have been the driving force behind thousands of political campaign wins, from local to federal levels. Organizations and their agencies work with us to identify and better understand critical voter and stakeholder audiences, implement quick, cross-screen digital targeting, and improve ad message relevancy across their intended targets—all leading to superior campaign success. The key voter segments outlined in this report are available for immediate activation across all programmatic digital channels, including CTV.

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INTRODUCING THE RESONATE 2024 PRIMARY ELECTION VOTER LANDSCAPE

Here at Resonate, our primary objective is to leverage deep voter intelligence and the latest technology to help you win elections. The result is an eligible U.S. electorate cleanly defined across 10 distinct segments based on a unique set of insights that will influence candidate choice in the 2024 primaries. These voter audiences are available for immediate targeting and activation across digital channels through our managed campaign solutions.

Other Voter Landscapes	Resonate's Voter Landscape
Static based on data collected at a point in time	Dynamic, refreshed nightly to reflect the 24 hour news cycle's impact on voter behavior and intent
Unable to predict future changes in political sentiment or bubbling issues.	Always fresh, continuously capturing voters and their evolving sentiment in real-time
Limited in scope with studies that focus on specific aspects such as demos or voting behavior	Based on thousands of data points on each audience, providing everything you need to understand them in vivid detail. Voters are complex, you need a scope of essential factors to really understand them
Focused on correlation, not causation and they don't get to the "why", the motivations behind these correlations	Include rich audience information on personal values and motivations, empowering you to identify who can be motivated to turn out and with what message
Not immediately actionable and exist independently of the digital eco-system, with no way to directly activate without recreating audiences using a variety of 3rd party data sources	Built for the digital ecosystem with direct integration for targeting across all digital screens and channels, including CTV

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resonate AT A GLANCE

15
YEARS OF EXPERIENCE

Founded to Connect Research to Voter Activation

Participated in 7 federal election cycles and 7 off year elections

Average Resonate tenure of team managing Political campaigns 5+ years

Data Science Team since inception.

1,500+
POLITICAL CAMPAIGNS

Helping candidates and Super PACs win elections with on-demand custom segments for superior persuasion & turnout efforts

$100+M

Invested in proprietary AI powered first party data and end-to-end solution platform

rAI KNOWS VOTERS

rAI is the heart of Resonate - our proprietary neural network that powers the creation of our Resonate Elements data set with speed, precision & scale. rAi leverages Resonate voter data, directly observed behavioral data & offline data to predict and continuously update comprehensive voter profiles

Data that keeps pace with today's voters, their positions and motivations

Resonate Ignite makes taking action on insights easy

Access, analyze, & act on the 14K+ highly predictive Resonate Elements attributes at your fingertips, including the psychographics, behaviors, preferences, and intent data you need to successfully target, engage & persuade voters.

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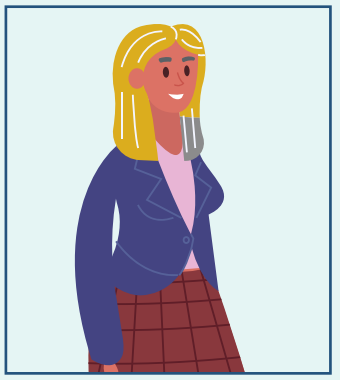
GET STARTED

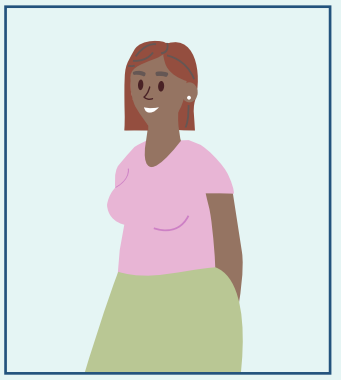
MEET THE VOTERS

LEFT LEANING:

LEGACY LIBERALS



SOCIAL JUSTICE DEFENDERS



GOTV DEMOCRATS

NEXTGEN CHANGEMAKERS

INDEPENDENT:

INFLUENCABLE BYSTANDERS

ISSUE-DRIVEN INFLUENCEABLES

UNREGISTERED DISENGAGED VOICES

RIGHT LEANING:

TRUMP-ET-EERS

AMERICA FIRST PATRIOTS

HOMEFRONT TRADITIONALISTS

Reduce Analysis Time by 90%

AI Insights by rAI instantly analyzes thousands of voter attributes to reveal those most critical to include in the audience definition, ensuring more effective targeting and engagement for activation across all channels.

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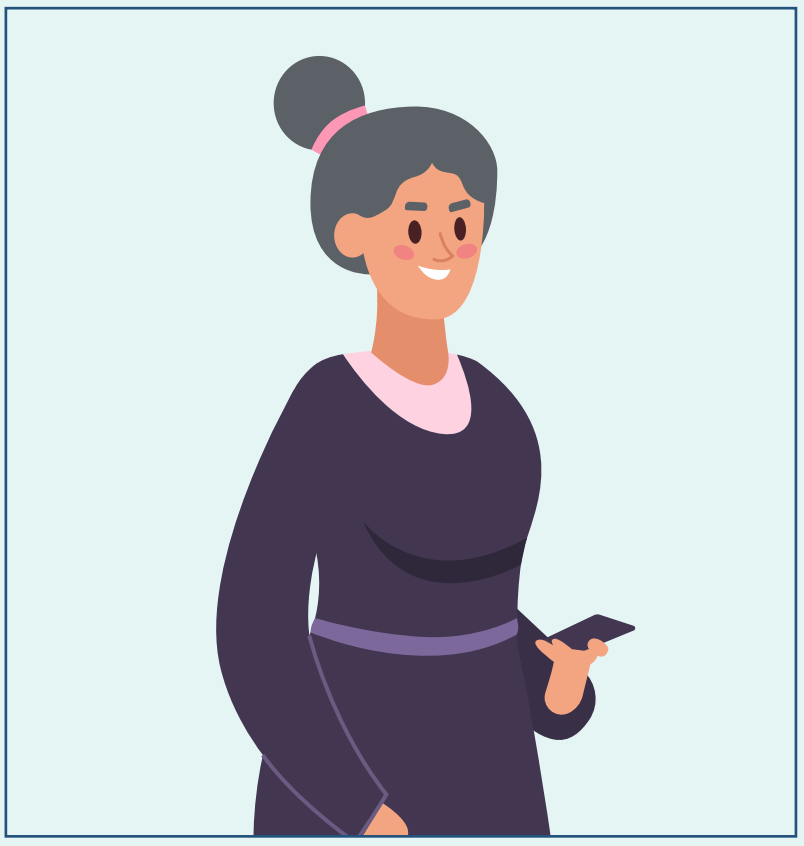
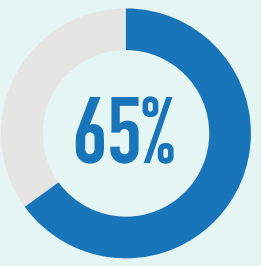
GET STARTED

LEGACY LIBERALS

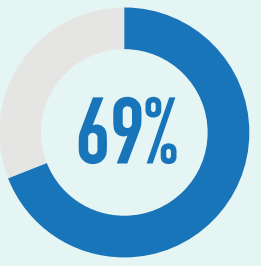


14.9 MILLION U.S. VOTERS

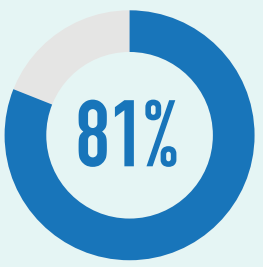
6.3% OF THE U.S. POPULATION



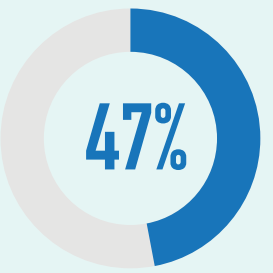
FEMALE



MARRIED



NO CHILDREN UNDER 18



65+

69% ARE FREQUENT VOTERS IN PRESIDENTIAL PRIMARIES

Politically active, this group has a strong affinity for the Democratic Party and progressive values. They generally favor President Biden's job performance (although are more likely to somewhat approve vs. strongly). Demographically, this is the oldest group consisting mostly of Boomers over 55 and retired.

WE'VE IDENTIFIED AN AUDIENCE OF 1M LEGACY LIBERALS IN THE STATE OF FLORIDA READY FOR IMMEDIATE TARGETING AND ACTIVATION.

48% FISCALLY MODERATE

32% SOMEWHAT SOCIALLY LIBERAL

MAINTAIN **ROUTINE HEALTHCARE**

FOCUSED ON **HEALTHCARE COSTS**

REGULARLY **READ FOR ENTERTAINMENT**

MORE LIKELY TO **CABLE OR SATELLITE SUBSCRIBERS**

RELY **ON TRADITIONAL MEDIA OUTLETS**

WHAT ISSUES RESONATE WITH LEGACY LIBERALS?

ENACTING **GUN CONTROL**

SUPPORTING **PRO-CHOICE RIGHTS**

REDUCING **CLIMATE CHANGE**

Remember, fresh data matters. Our models are updated nightly, so these percentages, which are based on the U.S. adult online population, may fluctuate.

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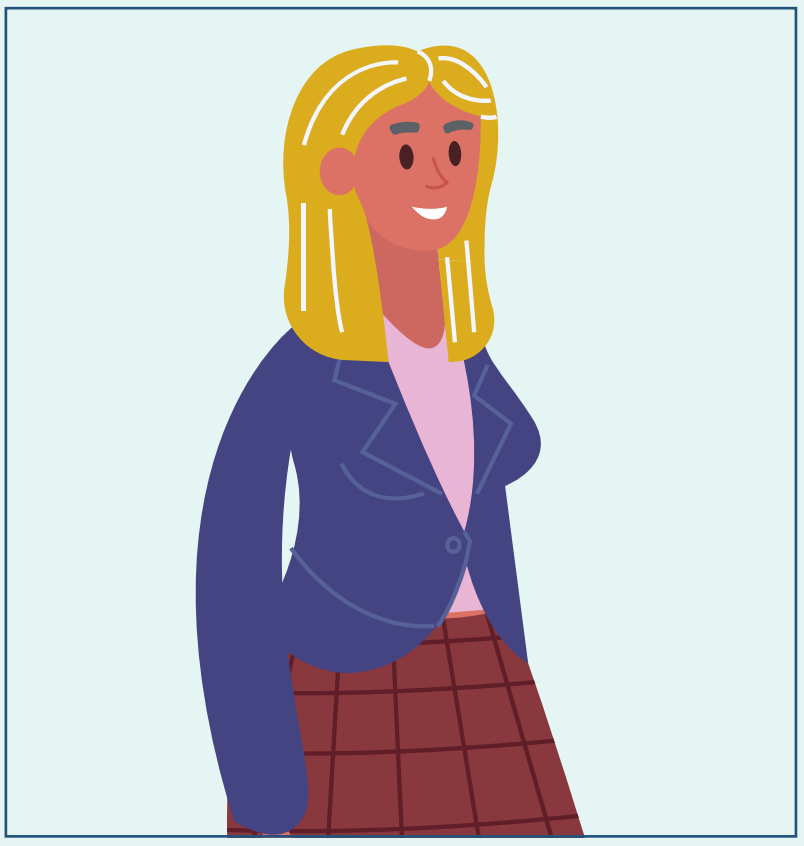
SOCIAL JUSTICE DEFENDERS



21.2 MILLION U.S. VOTERS

8.9% OF THE U.S. POPULATION

60%
FEMALE

61%
MARRIED

53%
HHI $100-$150K

28%
35-44

45% ARE FREQUENT VOTERS IN PRESIDENTIAL PRIMARIES

Charactertized by a strong alignment with the Democratic Party values and liberal or progressive ideologies, they are the furthest left on social issues.

WE'VE IDENTIFIED AN AUDIENCE OF 1M SOCIAL JUSTICE DEFENDERS IN THE STATE OF PENNSYLVANIA READY FOR IMMEDIATE TARGETING AND ACTIVATION.

45%
FISCALLY MODERATE

40%
VERY SOCIALLY LIBERAL

MORE LIKELY TO **PURCHASE FROM COMPANIES SUPPORTING DIVERSITY**

MORE LIKELY TO **OPPOSE LOWERING TAXES ON WEALTHY AMERICANS**

MORE LIKELY TO **SUPPORT CLEAN ENERGY POLICY**

MORE LIKELY TO **STREAM TV FOR MEDIA CONSUMPTION**

MORE LIKELY TO **ENJOY ARTS AND CRAFTS**

WHAT ISSUES RESONATE WITH SOCIAL JUSTICE DFENDERS?

PROMOTING **LGBT EQUALITY**

PROMOTING **GENDER/RACE/LBGT EQUALITY**

SUPPORTING **PRO-CHOICE ISSUES**

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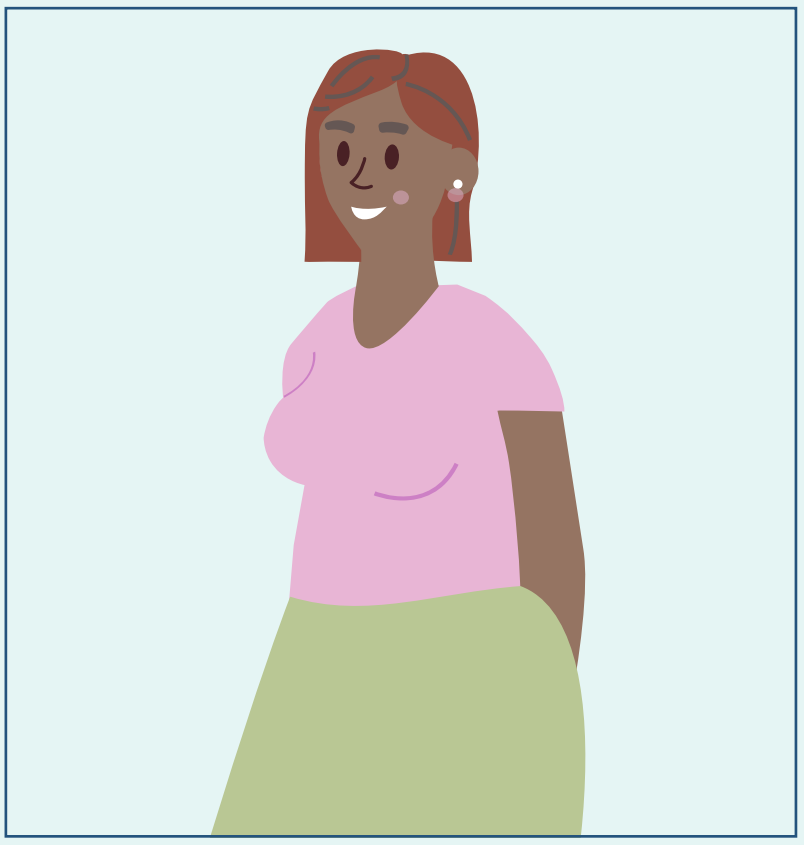
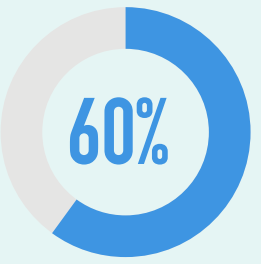
GOTV DEMOCRATS

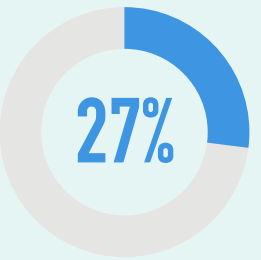


31.9 MILLION U.S. VOTERS

13.4% OF THE U.S. POPULATION



FEMALE



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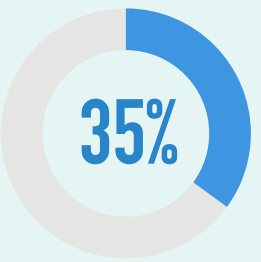
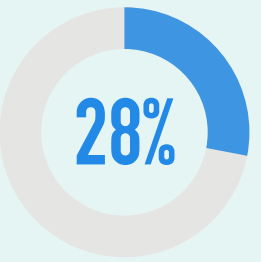


HHI $25-$50K



35-44

42% ARE FREQUENT VOTERS IN PRESIDENTIAL PRIMARIES

Outside of voting, their political engagement is limited. Among those with a left-leaning bend, this group is most likely to have unregistered voters.

WE'VE IDENTIFIED AN AUDIENCE OF 1.1M GOTV DEMOCRATS IN THE STATE OF MICHIGAN READY FOR IMMEDIATE TARGETING AND ACTIVATION.

49% FISCALLY MODERATE

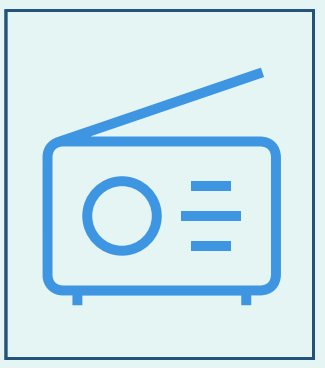
38% VERY SOCIALLY LIBERAL

CONCERNED ABOUT **PERSONAL AND FAMILY SAFETY**

CONCERNED ABOUT **CRIME & VIOLENCE**

CONCERNED OVER **COST OF LIVING**

MORE LIKELY TO **BE RETIRED**



MORE LIKELY TO **FAVOR URBAN RADIO STATIONS**

WHAT ISSUES RESONATE WITH GOTV DEMOCRATS?

ENACTING **GUN CONTROL**

REFORMING **ENTITLEMENTS**

PROMOTING **GENDER/RACE EQUALITY**

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NEXTGEN CHANGEMAKERS

21.5 MILLION U.S. VOTERS

9.1% OF THE U.S. POPULATION

62%
MALE

35%
HHI $25-50K

58%
SINGLE

44%
18-24 YOA

59% ARE FREQUENT VOTERS IN PRESIDENTIAL PRIMARIES

Democratically leaning but with a notable independent presence, this is the youngest segment (largest representation of Gen Z). While left-leaning, this group is not impressed with Biden's job performance and many favored Trump in the last Presidential race.

WE'VE IDENTIFIED AN AUDIENCE OF 1.3M NEXTGEN CHANGEMAKERS IN THE STATE OF ARIZONA READY FOR IMMEDIATE TARGETING AND ACTIVATION.

35%
FISCALLY MODERATE

29%
VERY SOCIALLY LIBERAL

MOST LIKELY TO **ENGAGE IN SIGNING PETITIONS**

MORE LIKELY TO **PAY ATTENTION TO INFRASTRUCTURE**

MORE LIKELY TO **CONSUME MEDIA WITH TV STREAMING**

MORE LIKELY TO **READ NEWSPAPERS**

MORE LIKELY TO **BE PHYSICALLY ACTIVE**

WHAT ISSUES RESONATE WITH NEXTGEN CHANGEMAKERS?

PROMOTING **CIVIL LIBERTIES**

HUMAN RIGHT & WAR CRIMES

PROMOTING **GENDER/RACE EQUALITY**

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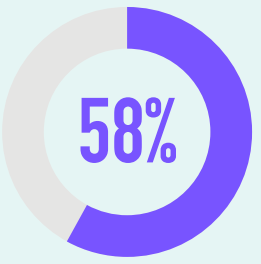
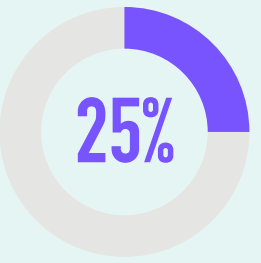
INFLUENCABLE BYSTANDERS

21.1 MILLION U.S. VOTERS

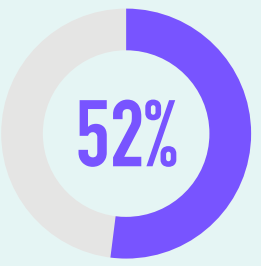
8.9% OF THE U.S. POPULATION



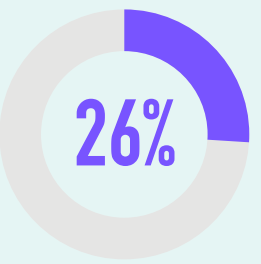
MALE



HHI $25-50K



SINGLE



25-34

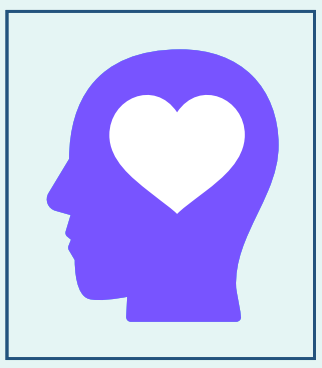
52% ARE NOT REGISTERED TO VOTE

Idealogically this group is fairly balanced with notable representation across Independents, Democrats, and Republicans- although they may have a slight left-leaning bend. Despite this, they are politically unengaged with most being unregistered voters.

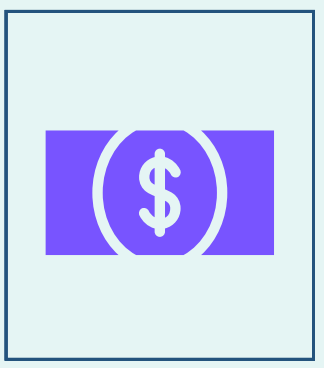
WE'VE IDENTIFIED AN AUDIENCE OF 1.8M INFLUENCEABLE BYSTANDERS IN THE STATE OF FLORIDA READY FOR IMMEDIATE TARGETING AND ACTIVATION.

34% FISCALLY MODERATE

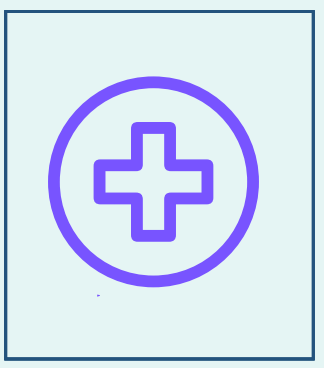
26% ARE VERY SOCIALLY LIBERAL



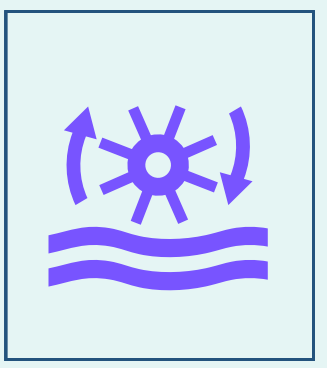
MOST LIKELY TO **PURCHASE FROM COMPANIES THAT SUPPORT WOMEN'S RIGHTS**



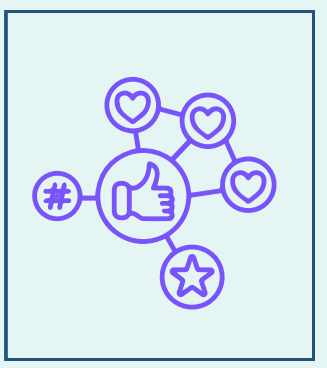
FAVOR **RAISING THE MINIMUM WAGE**



FAVOR **STRONG HEALTHCARE SOLUTIONS**



FAVOR **ENVIRONMENTAL PROTECTIONS**



RELY **ON SOCIAL MEDIA FOR VOTING DECISIONS**

WHAT ISSUES RESONATE WITH INFLUENCABLE BYSTANDERS?

HUMAN RIGHTS AND WAR CRIMES

ENACTING **GUN CONTROL**

REDUCING **CLIMATE CHANGE**

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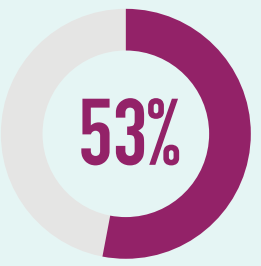
ISSUE-DRIVEN INFLUENCEABLES

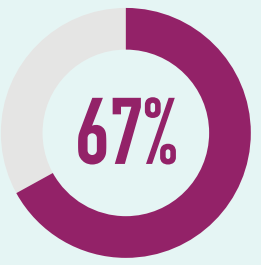
54 MILLION U.S. VOTERS

22.7% OF THE U.S. POPULATION

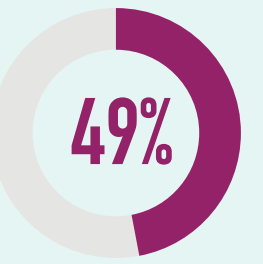


MALE

AGE 35-64



NO CHILDREN UNDER 18



MARRIED

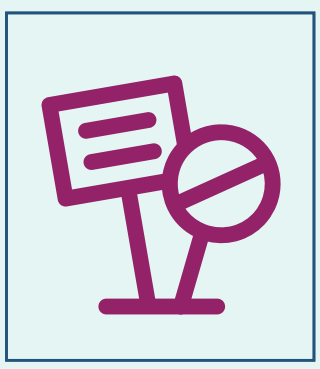
55% ARE FREQUENT VOTERS IN PRESIDENTIAL PRIMARIES

Ideologically this group is reasonably well-balanced across Independent, Democrats, Republicans, and other parties. Their voting energy is focused on Presidential elections, including modest engagement with primaries compared to other groups. only about half were involved in the 2022 midterms even though they had previously expressed interest in them. Outside of voting, their engagement in political activities is limited.

WE'VE IDENTIFIED AN AUDIENCE OF 1.7M ISSUE-DRIVEN INFLUENCEABLES IN THE STATE OF GEORGIA READY FOR IMMEDIATE TARGETING AND ACTIVATION.

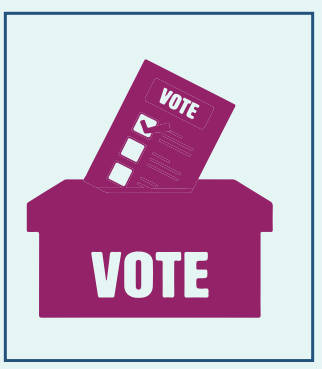
44% FISCALLY MODERATE

39% SOMEWHAT SOCIALLY LIBERAL



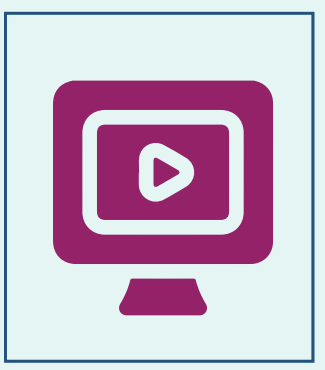
IN FAVOR OF **REPEALING EXISTING REGULATIONS**

MORE LIKELY TO **OPPOSE NEW GUN REGULATIONS**



CONCERNED ABOUT **ELECTION FRAUD**

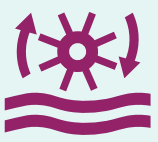
MORE LIKELY TO **BE RETIRED**



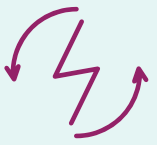
MORE LIKELY TO **BE FOUND ON TV STREAMING**

WHAT ISSUES RESONATE WITH ISSUE-DRIVEN INFLUENCABLES?

REFORMING **ENTITLEMENT POLICY**



REDUCING **CLIMATE CHANGE**



ALTERNATIVE ENERGY SOURCES

Remember, fresh data matters. Our models are updated nightly, so these percentages, which are based on the U.S. adult online population, may fluctuate.

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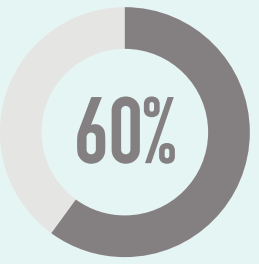
UNREGISTERED DISENGAGED VOICES

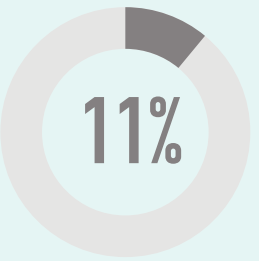
6

26.7 MILLION U.S. VOTERS

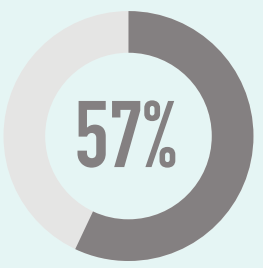
11.3% OF THE U.S. POPULATION



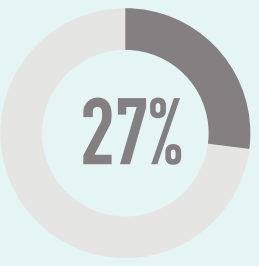
FEMALE



UNEMPLOYED



NO CHILDREN UNDER 18



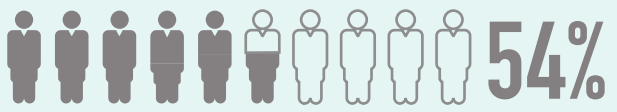
25-34

92% ARE NOT REGISTERED TO VOTE

This group represents those who are politically unengaged and not registered to vote. It consists mostly of Millennials, with a considerable number of Gen X and Gen Z mixed in. They are most likely to have a high school education or less, be unemployed, a homemaker, or working part-time, and are among those most likely to be "blue collar."

NOT RECOMMENDED FOR TARGETING IN YOUR CAMPAIGN STRATEGY.

63% FISCALLY MODERATE



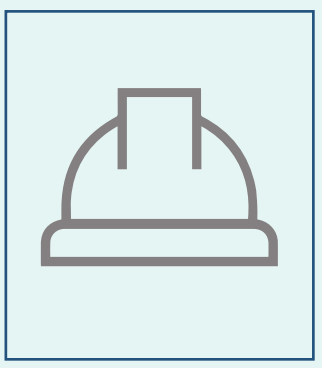
54% SOMEWHAT SOCIALLY LIBERAL

TOP PERCIEVED THREAT
JOE BIDEN

CAN BE FOUND ON SOCIAL MEDIA

LEAST LIKELY TO
BE FOUND ON CABLE OR SATELLITE TV

CONCERNED ABOUT
AFFORDABLE HOUSING



MOST LIKELY TO BE
BLUE COLLAR

WHAT ISSUES RESONATE WITH UNREGISTERED DISENGAGED VOICES?

PROTECTING
ONLINE/INTERNET PRIVACY

HUMAN RIGHTS AND WAR CRIMES

MAINTAINING
SECOND AMENDMENT

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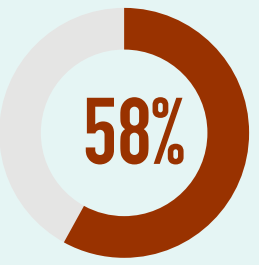
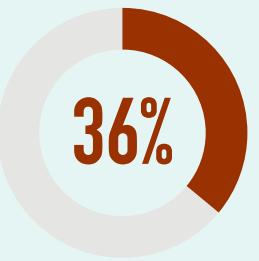
TRUMP-ET-EERS

13.1 MILLION U.S. VOTERS

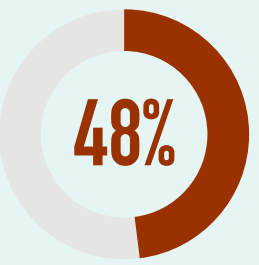
5.5% OF THE U.S. POPULATION



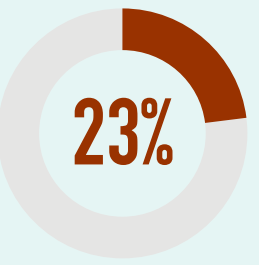
MALE



MARRIED



NO CHILDREN UNDER 18



45-54

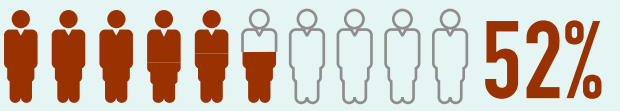
73% ARE FREQUENT VOTERS IN PRESIDENTIAL PRIMARIES

Strong supporters of former President Trump, this Republican group is satisfied with his political policies and believe strongly that he should run again in 2024. Although this right-leaning group is most likely to have unregistered voters, overall their political engagement is strong with a voting record that extends beyond Presidential elections into primaries, midterms, as well as state/local cycles.

WE'VE IDENTIFIED AN AUDIENCE OF 1.1M TRUMP-ET-EERS IN THE STATE OF FLORIDA READY FOR IMMEDIATE TARGETING AND ACTIVATION.

50%

FISCALLY MODERATE



52%

VERY SOCIALLY CONSERVATIVE

PERSONAL VALUES INCLUDE **TRADITION, AUTHORITY, SECURITY**

DRIVEN BY **DAILY PRAYER**

MOST LIKELY TO BE **BLUE COLLAR**

MORE LIKELY TO **SUPPORT BUSINESSES WITH CHRISTIAN VALUES**

MORE LIKELY TO **WATCH NEWS NATION AND FOX NEWS**

WHAT ISSUES RESONATE WITH TRUMP-ET-EERS?

SUPPORTING **PRO-LIFE ISSUES**

DEFENDING **TRADITIONAL MARRIAGE**

MAINTAINING **THE SECOND AMENDMENT**

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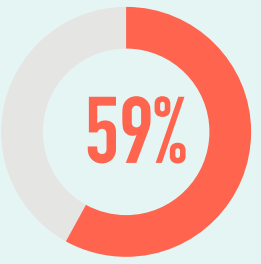
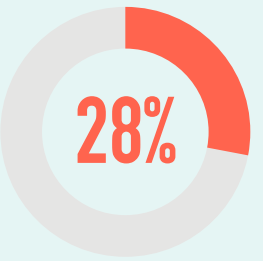
AMERICA FIRST PATRIOTS

24.1 MILLION U.S. VOTERS

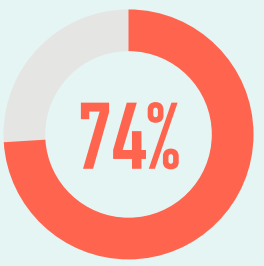
10.1% OF THE U.S. POPULATION



FEMALE



RETIRED



MARRIED

AGE 65+

59% ARE FREQUENT VOTERS IN PRESIDENTIAL PRIMARIES

While uncertain of their satisfaction with former President Trump's personal behavior, they are more satisfied with his political policies than not...and more in favor of him running in 2024 than not (although open to other GOP candidates).

WE'VE IDENTIFIED AN AUDIENCE OF 1.3M AMERICA-FIRST PATRIOTS IN THE STATE OF PENNSYLVANIA READY FOR IMMEDIATE TARGETING AND ACTIVATION.

44%

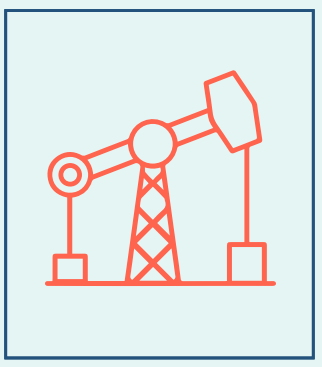
SOMEWHAT FISCALLY CONSERVATIVE

32%

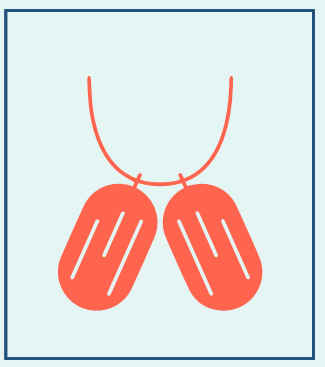
SOMEWHAT SOCIALLY CONSERVATIVE

PERSONAL VALUES INCLUDE **MAINTAINING TRADITION, OBEYING**

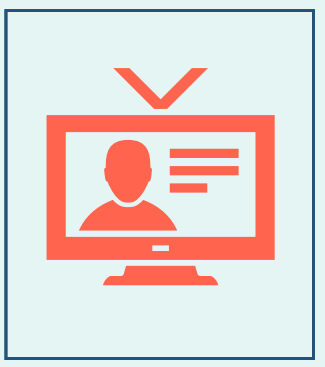
MORE LIKELY TO **BE IN FAVOR OF TOUGHENING LAW ENFORCEMENT**



MORE LIKELY TO **BE IN FAVOR OF DEVELOPING TRADITIONAL ENERGY SOURCES**



MORE LIKELY TO **SUPPORT BUSINESSES WITH THAT SUPPORT VETERANS**



MORE LIKELY TO **FAVOR TRADITIONAL BROADCASTS**

WHAT ISSUES RESONATE WITH AMERICA FIRST PATRIOTS?

CONTROLLING **IMMIGRATION**

TOUGHENING **LAW ENFORCEMENT**

MAINTAINING **THE SECOND AMENDMENT**

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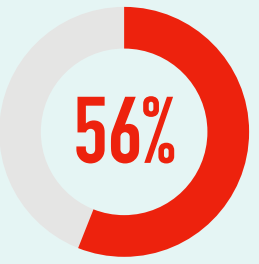
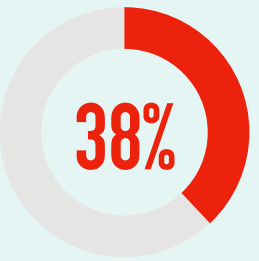
HOMEFRONT TRADITIONALISTS

8.9 MILLION U.S. VOTERS

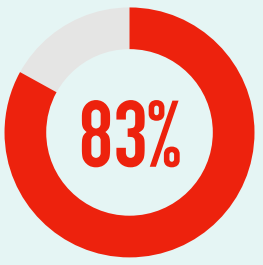
3.8% OF THE U.S. POPULATION



MALE



HAVE 2-3 CHILDREN UNDER 18



WORK FULL TIME

45-54

73% ARE FREQUENT VOTERS IN PRESIDENTIAL PRIMARIES

With a strong affinity toward Republican ideology, this is a family-oriented group. Family time is the best part of their day and they are most likely to consider family or social gatherings an important aspect of culture.

WE'VE IDENTIFIED AN AUDIENCE OF 1M HOMEFRONT TRADITIONALISTS IN THE STATE OF TEXAS READY FOR IMMEDIATE TARGETING AND ACTIVATION.

41%

SOMEWHAT FISCALLY CONSERVATIVE

33%

VERY SOCIALLY CONSERVATIVE

PERSONAL VALUES INCLUDE **TRADITION, SAFETY, ACQUIRING WEALTH AND INFLUENCE**

VERY LIKELY TO **BE ACTIVE ON SOCIAL MEDIA**

MORE LIKELY TO **HAVE A COLLEGE DEGREE**

MORE LIKELY TO **SUPPORT PRO-LIFE BUSINESSES**

TOP THREAT IS **PROGRESSIVE LIBERALS & MAINSTREAM MEDIA**

WHAT ISSUES RESONATE WITH HOMEFRONT TRADITIONALSTS?

CONTROLLING **IMMIGRATION**

STRENGTHENING **FOREIGN POLICY**

SUPPORTING **PRO-LIFE ISSUES**

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TAKE ACTION

The above voter audiences—*and thousands more niche primary segments*—are available for immediate targeting and activation with the help of our expert digital ad strategists. **Resonate has been partnering with political campaigns for 7 election cycles, executing and optimizing your campaigns for better performance so that you can WIN elections.**

Americans are a diverse population and American voters are a diverse electorate. You need rich, relevant, real-time voter intelligence that gets at the deepest insights that help you build and execute campaigns that win over the evolving U.S. voter. You need to know their personal drivers, the values they hold close, and their positions on key issues to determine if they are a winnable segment for your campaign. Better segmentation provides more personalized messaging opportunities. More relevant messaging that appeals directly to the values and the issues most important to winnable voters is the most effective way to motivate them to turn out and cast their vote for you on election day.

---

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IS YOUR 1-STOP SHOP PARTNER FOR REAL-TIME AI-POWERED RESEARCH AND AUDIENCE TARGETING ACROSS ALL DIGITAL SCREENS

Fastest answers, deepest understanding of any voting audience down to CD level

Better segmentation for delivering more impactful, personalized messaging

Meet voters where they are TODAY for more precise, scalable and effective voter targeting across all programmatic digital channels:

CTV | OTT | PRE-ROLL | DISPLAY | SOCIAL

GET STARTED

Resonate is a pioneer in A.I.-powered voter data, delivering best-in-class targeting and deep, real-time audience analysis. Our first-party research, segmentation builder, and managed programmatic media services have been the driving force behind thousands of political and advocacy campaign wins, from local to federal levels. Organizations and their agencies work with Resonate to identify and better understand critical voter and stakeholder audiences, implement quick, cross-screen digital targeting, and improve ad message relevancy across their intended targets—all leading to superior campaign success.

resonate | 855.855.4320 | success@resonate.com