



Prophesying 2024

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“In just a few years, we have gone from being relatively secure in our democracy to being a few short steps, and a matter of months, away from the possibility of dictatorship.”

- ROBERT KAGAN, NOVEMBER 30, 2023

[HTTPS://WWW.WASHINGTONPOST.COM/OPINIONS/2023/11/30/TRUMP-DICTATOR-2024-ELECTION-ROBERT-KAGAN/](https://www.washingtonpost.com/opinions/2023/11/30/trump-dictator-2024-election-robert-kagan/)

Burning Questions

- What are the stakes of the election?
- What is currently knowable about the 2024 election?
- What have the 2023 elections told us?
- What are the polls saying about Biden and his prospects for reelection?
- Will voters have a better view of the economy by the '24 election?
- Will Trump's outright fascism damage his election prospects?
- Will the anti-MAGA coalition return in 2024?

It is time to ask: what happens if Trump wins?

1. Trump has assembled a team to plan his autocratic takeover of the government
2. There is a plan on day 1 to issue executive order “Schedule F in the Excepted Service”
3. Trump would replace up to 54,000 federal workers with loyalists from a database his counselors have been building (they have over 5K names already)
4. Those loyalists would give Trump unchecked, unheard of Presidential power
5. He plans on using the Justice department to go after his political enemies
6. He plans on politicizing the military – replacing leaders with the MAGA cult
7. He plans to use the military to stifle protests
8. He plans to first jail and then deport all 11 million undocumented people
9. He would take over the FCC and FTC, possibly even the Federal Reserve

These are not secret plans – they are being discussed openly

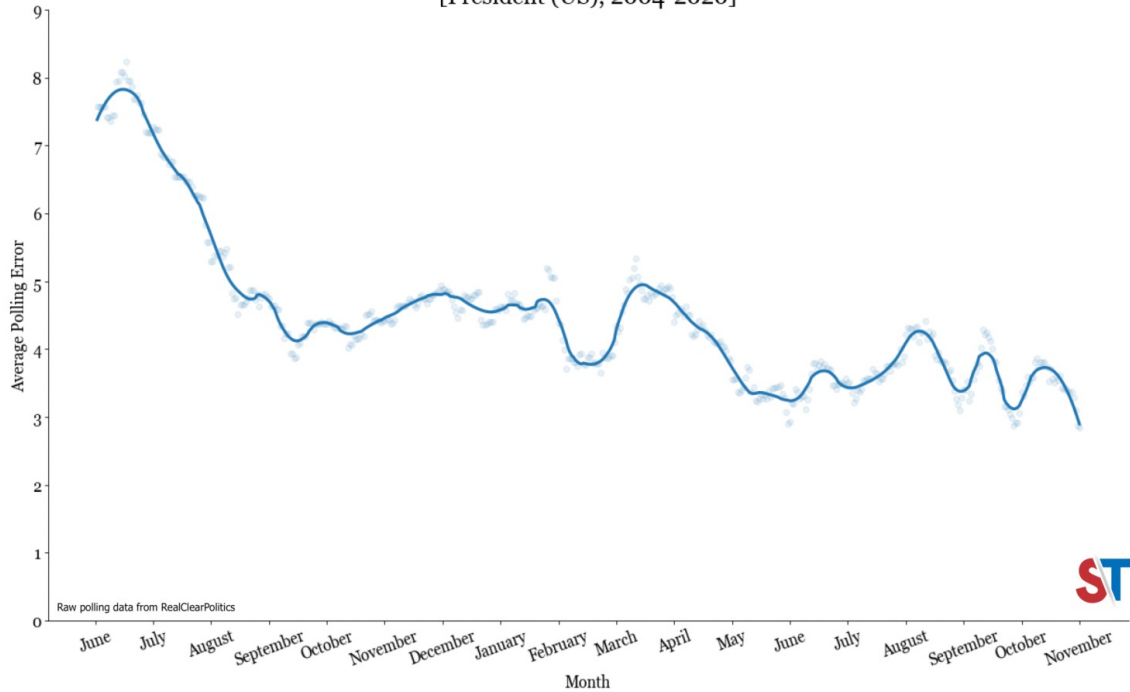
Implications of this

1. Opposition to Trump could mean arrest or investigation: Rep. / Sen. Schiff would likely be arrested, for example
2. News outlets critical of Trump could be shut down or sued by the DOJ
3. Protests against the administration could face military intervention
4. Neighborhoods with high immigrant populations would see unprecedented intimidation and harassment
5. Future elections would be comprised: DOJ would likely interfere in vote counting and things like vote by mail, national strict voter ID laws, new forms of 'poll tax', etc.
6. Trump would likely refuse to leave office
7. **Taken as a whole, American Democracy would be fatally wounded**

What is knowable right now?

Average Polling Error vs Time

[President (US), 2004-2020]



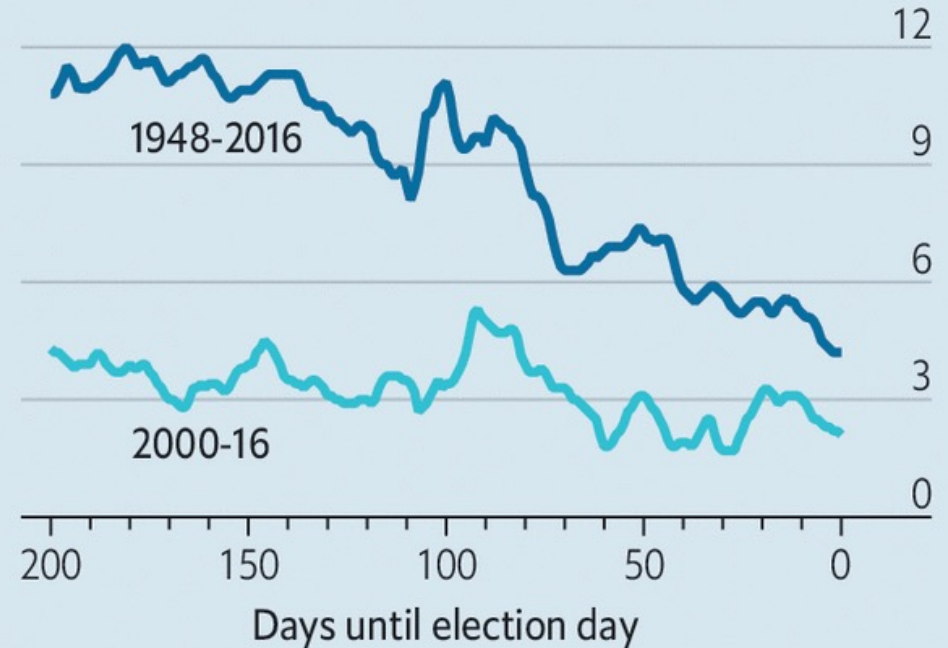
<https://split-ticket.org/2023/06/20/how-much-does-early-presidential-polling-matter/>

Historically, polls one year from an election have not been accurate or predictive

VIX for politics

(VIX = volatility index)

United States, average error between Democratic vote margin in polls and final election results
Percentage points



Sources: Will Jennings and Christopher Wlezien; *The Economist*

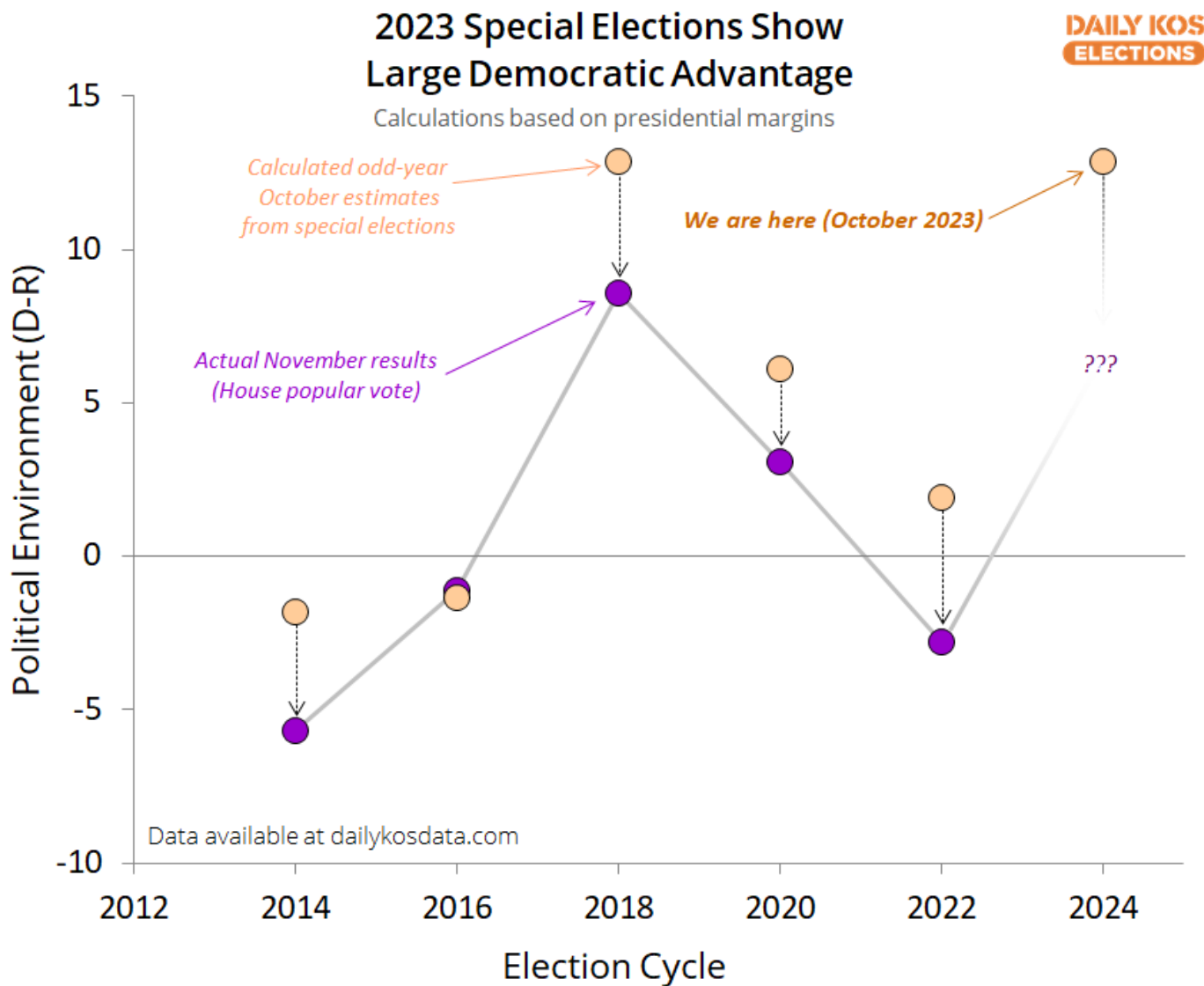
The Economist

2023 Elections – Democrats Outperform Across the US

1. In 30 special elections in 2023, Democratic candidates outperformed the partisan average by 11 points
2. Democrats held the State Senate and flipped the House of Delegates in VA
3. Of 13 swing state/house districts in VA, Democrats flipped 4 back from 2021, despite Gov. Youngkin's money and influence
4. Even in the 8 swing races Republicans won, their margin of victory shrank compared to 2021.
5. VA Turnout was down from 2019 but still much higher than in 2015 or 2011
6. In Kentucky, Gov. Beshear improved his 2019 performance by 3 points and won several counties Trump won in 2020.
7. In Ohio, abortion rights won a statewide ballot proposition by a landslide, winning in 18 counties Trump won in 2020.

2023 Elections Analysis

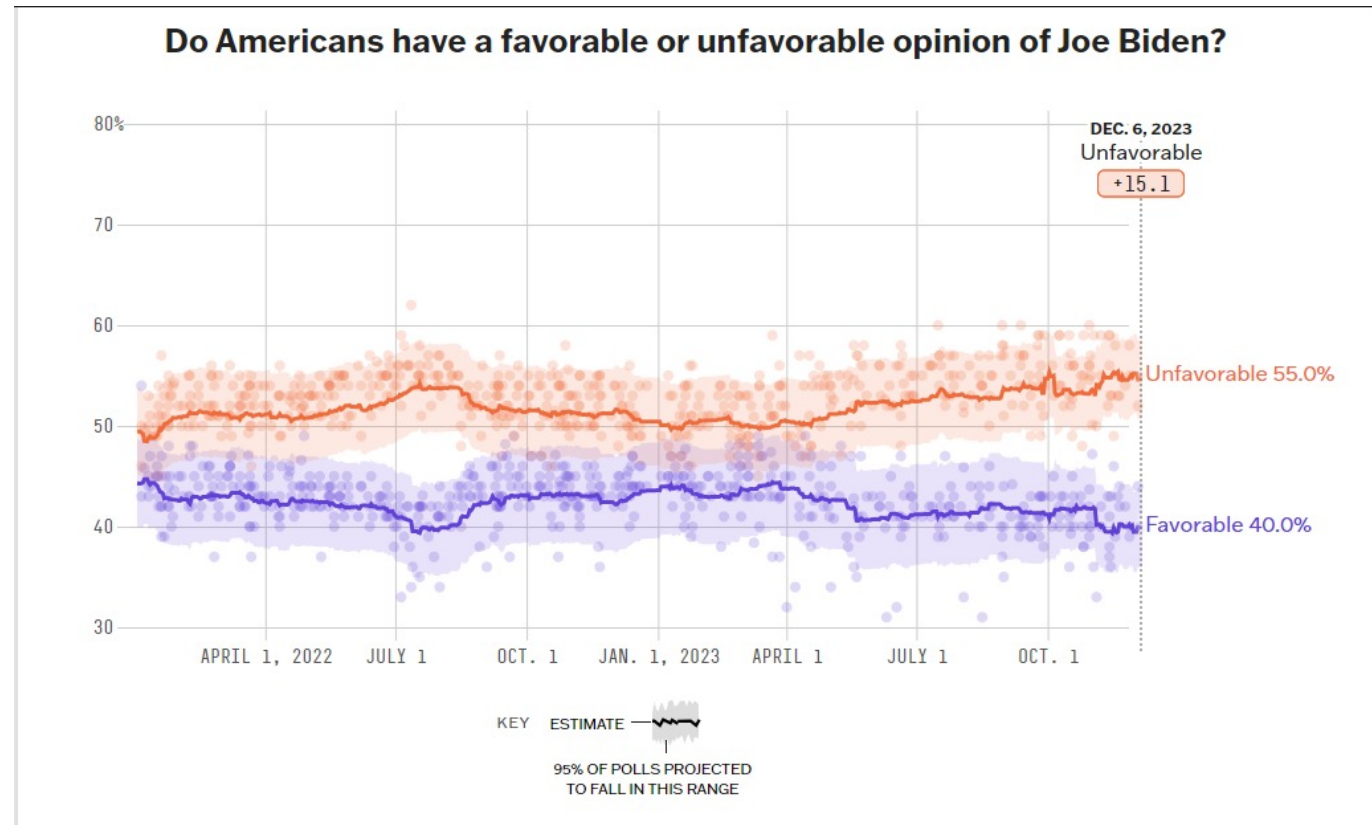
- There is a significant difference between Biden's polling numbers and voting behavior
- The anti-MAGA coalition may not strongly approve of Biden, but they are voting, and continuing to vote for Democrats
- Abortion rights are emerging as a bipartisan issue, garnering significant republican report across the US
- The media is overemphasizing polls and underemphasizing voting
- Historically, special elections have predicted the performance in the next general election (note this is not universally accepted)



Current Biden Polling: Not Great

1. Biden's numbers range from terrible to awful
2. Voters give him low marks on the economy in particular*
3. He's at:
 - -13 with white voters
 - +3 with non-whites (!!)
 - -17 with 18-39 year olds (!!!)
4. HOWEVER, he still leads Trump head-to-head in 4 recent polls (44-42; 43-42; 39-37; 37-35)

*this makes no sense at all



Americans are dead wrong about the economy

Consider the following:

- GDP growth was 5.2% last quarter
- US has had best recovery from COVID in the G7
- Inflation was zero last month
- Wage growth remains robust, 5% via Atlanta Fed; wages have been beating inflation for many months now
- Median wealth up 37% from 2020-2022; median wealth for 18-34 year olds in this period more than doubled
- Jobs are more plentiful than anytime since the 1960s
- US has lowest uninsured rate in history
- New businesses being created at record rates
- US setting records in oil AND renewable energy production
- Gen Z home ownership matching previous generations
- Many cities and states have raised the minimum wage in recent years, creating a much higher income floor for young and poorer workers
- Biden has erased \$127 billion in student loan debt

70% of Americans think the economy is terrible!!!

What is going on???

- Americans are still not used to the inflation of 2020-2021
- Media reporting has consistently emphasized the bad news over the good
- People are parroting what they've heard and not reporting their own financial situation
- EX: 82% of Republicans who say their own financial situation is good also say the economy is bad!!
- People are saying "the economy is bad" as a proxy for a general feeling of national malaise

Americans are adamant that US economic circumstances are getting worse. They're wrong

Share of US adults who hold each view, by whether the view is supported by the latest data

■ Incorrect ■ Answered 'about the same' ■ Correct

Comparing today to one year ago, which has increased faster on average across the US, prices or wages?

Prices have risen faster than wages: 90% Wages: 10%

Do you think the rate of inflation has gone up, down, or stayed about the same since this time last year?

Inflation has risen in the past year: 73% Down: 9%

In terms of net worth, do you think the median American household is wealthier today than before the pandemic?

Wealthier before the pandemic: 67% Wealthier today : 13%

Do you think someone on a median income could afford a better lifestyle today or a year ago?

Could afford a better lifestyle a year ago: 63% Better today: 11%

Many think things are worse than 30 years ago, which is even more wrong

Do you think the share of Americans living in poverty is higher today than 30 years ago?

Poverty is higher today: 68% Lower today: 16%

Do you think someone on a median income can afford a better lifestyle today than 30 years ago?

Could afford a better lifestyle 30 years ago: 60% Better today: 23%

In terms of net worth, do you think the median American household is wealthier today than 30 years ago?

Wealthier 30 years ago: 56% Wealthier today: 26%

Do you think the unemployment rate is higher today than 30 years ago?

Unemployment higher today: 51% Lower today: 29%

Source: FocalData representative survey of 2,217 US adults, 25-27 November 2023

FT graphic by John Burn-Murdoch / @jburnmurdoch

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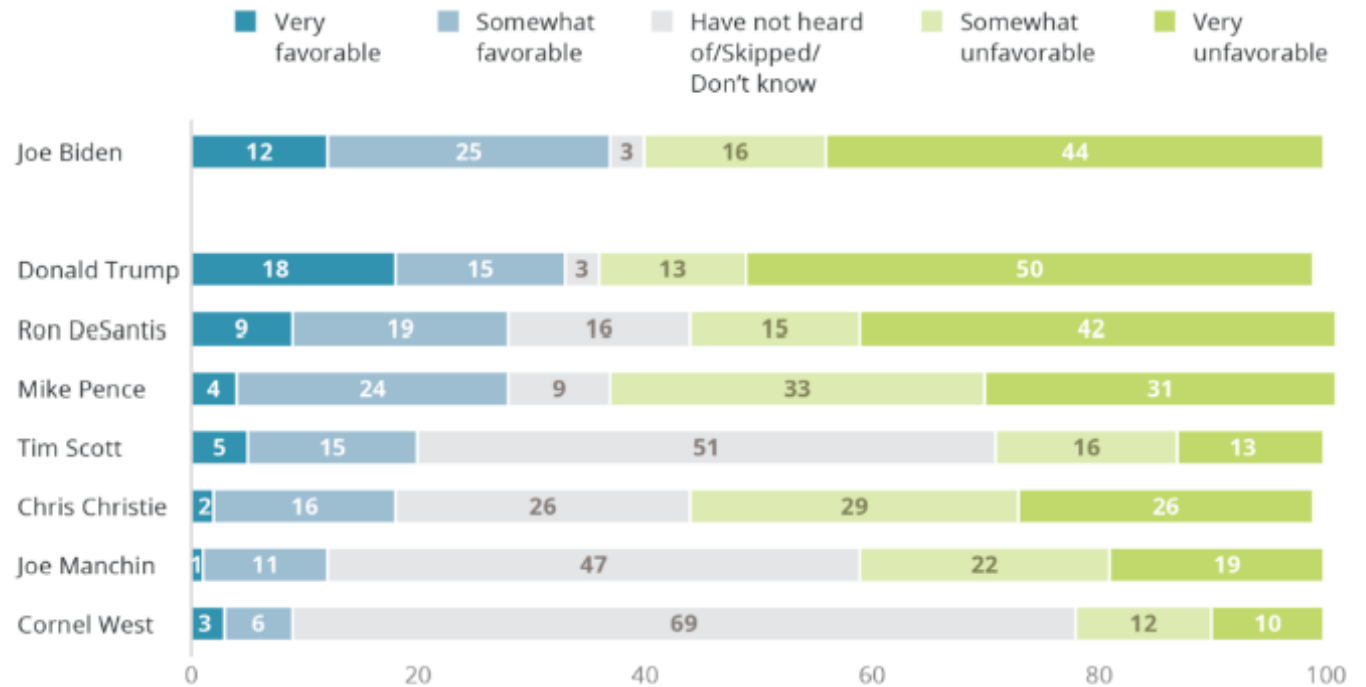
What Americans think of Trump: they don't like him at all

Percent of people who view him favorably:

- White evangelical protestants: 61%
- White mainline protestants: 44%
- White Catholics: 39%
- White Americans: 39%
- Silent Generation: 38%
- Hispanic: 33%
- Millennials: 32%
- Gen Z: 29%
- White, College Educated: 28%
- AAPI: 22%

FIGURE 11. Favorability of 2024 Presidential Candidates

Percent whose views are:



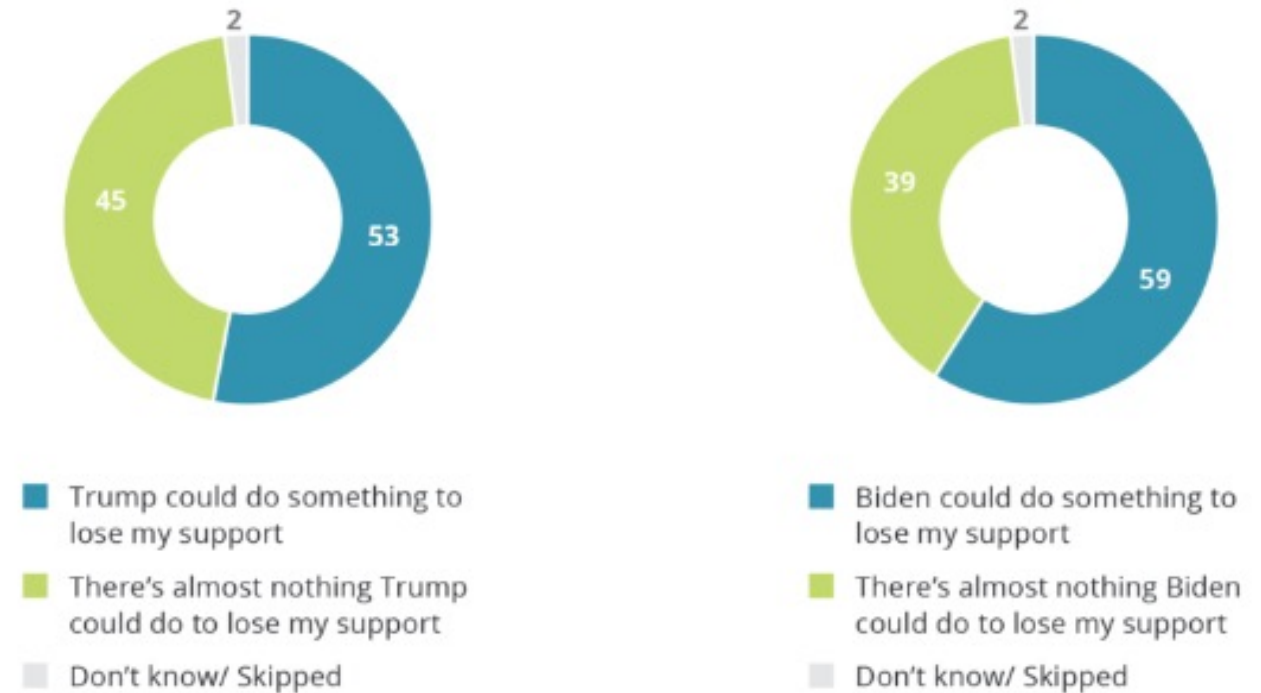
Source: PRRI American Values Survey, 2023.

Firmness of Support

More than half of both Biden's and Trump's supporters say they could change their support

FIGURE 10. Firmness of Support for Biden vs. Trump

Percent of Americans with favorable views of Trump/Biden who say:



Source: PRRI American Values Survey, 2023.

Americans growing more comfortable with violence and authoritarianism

FIGURE 3. Support for Political Violence in Response to Direction of the Country, by Party and Religious Affiliation

Percent who agree that "Because things have gotten so far off track, true American patriots may have to resort to violence in order to save our country:"

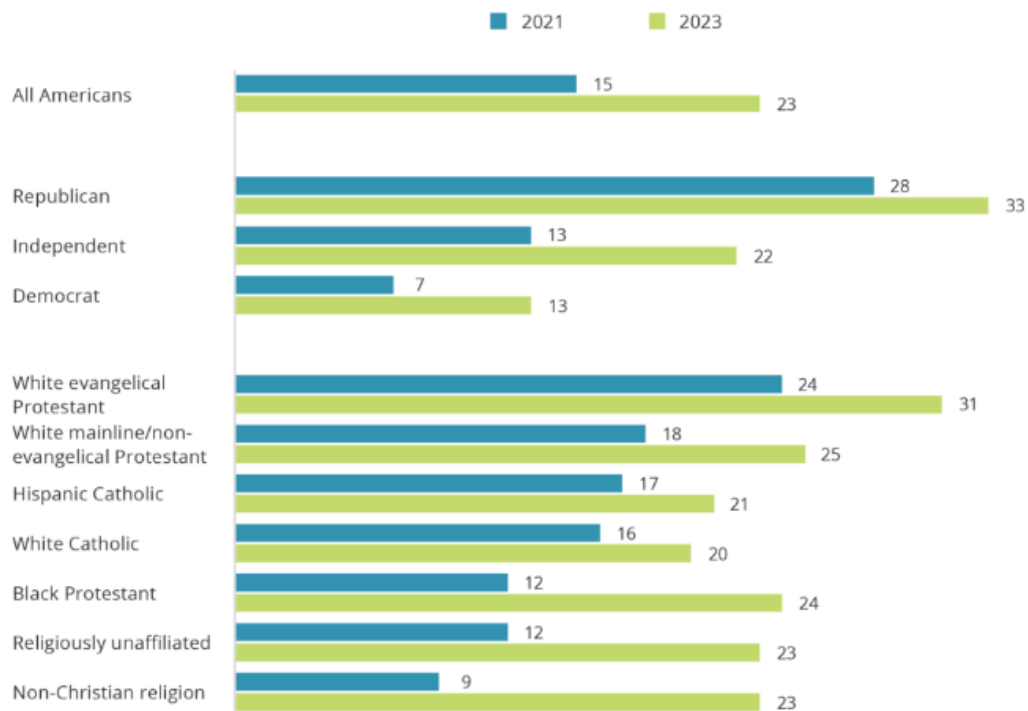


FIGURE 2. Support for Authoritarianism in Response to Direction of the Country, by Party and Religious Affiliation

Percent who agree that "Because things have gotten so far off track in this country, we need a leader who is willing to break some rules if that's what it takes to set things right:"

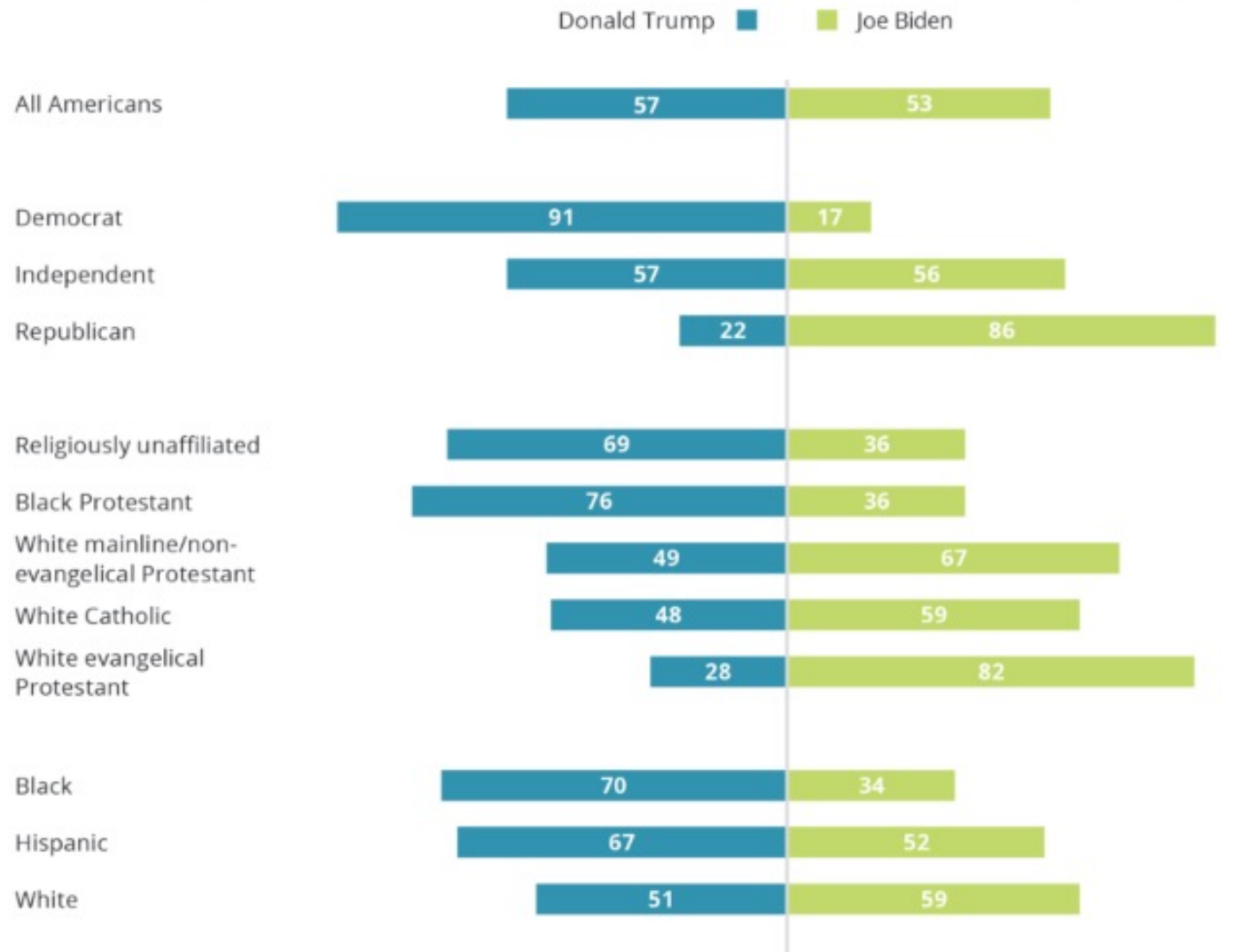


Americans largely recognize threat of Trump

But Republicans also see Biden / Democrats as equal threats

FIGURE 20. Believe Trump or Biden Are a Threat to Democracy, by Party, Religion, Race, and Generation

Percent who agree the re-election of _____ poses a threat to American democracy and way of life:



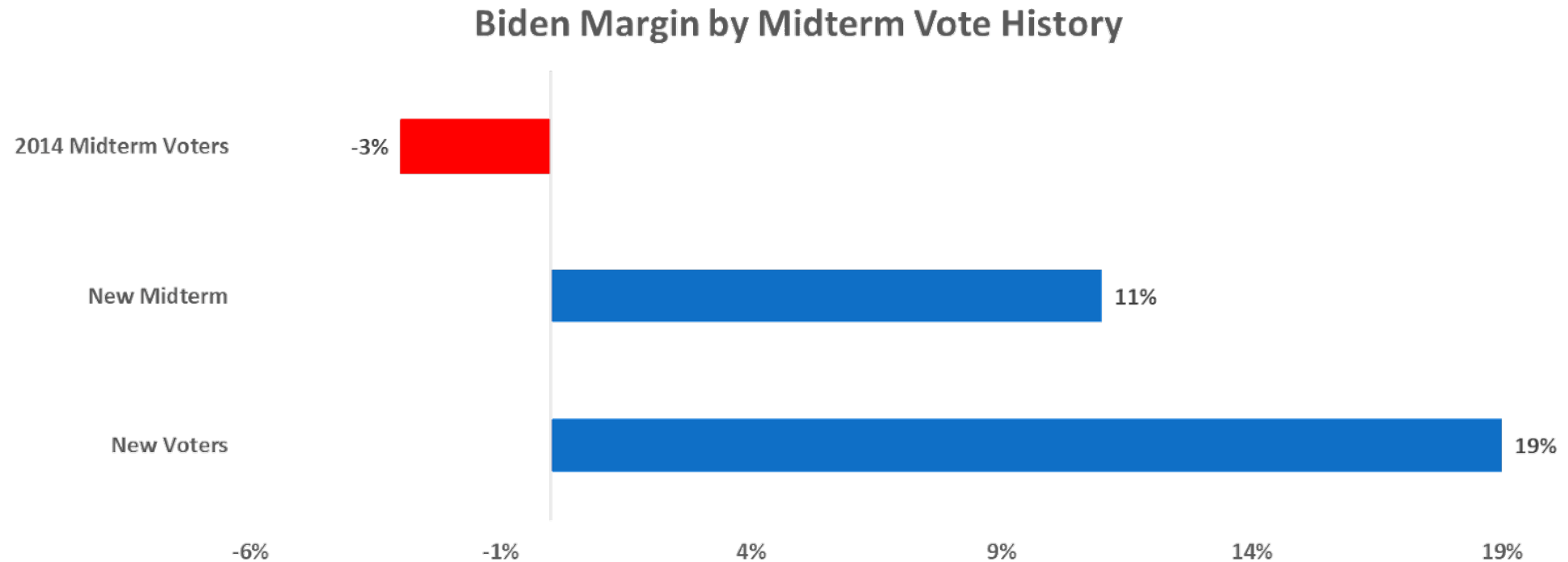
Implications of this

1. Americans like Trump even less than they like Biden
2. Even prior to intense media scrutiny of Trump's 2025 plans, Americans understand that electing Trump would be a huge problem for democracy
3. There is not a perfect correlation between not liking Biden and not voting for him: people who don't like Biden may well end up voting for him
4. Majority of Republicans continue to live in a disinformation bubble
5. Extremism is getting worse: more Americans see political violence as justified

Remember the Anti-MAGA voters

- ❑ Among those who voted in 2016, Biden got the same vote share as Hillary Clinton (+2 nationally)
- ❑ But Joe Biden won the 40 million Americans who did not vote in 2016 by 12 points
- ❑ These overlap with the 39.6m new midterm voters (didn't vote in 2014, did vote in 2018 and 2020): they favor Ds by 12.7%

How important is the anti-MAGA midterm voter to Democrats?



Source: Catalist

Will they show up again in 2024?

- ❑ 2023 Special Elections / Virginia Elections suggest they will
- ❑ There is little evidence to suggest there will be a lot of Biden / Trump voters
- ❑ The Republican party and Trump have no message to win over the Anti-MAGA voters
- ❑ Trump will get more and more scrutiny as a candidate: this is not going to improve perception of him among non-MAGA voters

Major Risks

- ❑ 3rd parties are currently polling at 15% - may be pulling equally from Biden and Trump, however
- ❑ Currently younger voters are more critical of Biden / Democrats – and we can't win without them
- ❑ Biden's polling numbers with non-white voters are alarming
- ❑ Trumpism has damaged the office of the Presidency, potentially ending the incumbency advantage
- ❑ Corruption of the republican party* and their ability to lie openly has damaged public's view of government more broadly – will it harm turnout?

*“The rules are simple: they lie to us, we know they're lying, they know we know they're lying, but they keep lying to us, and we keep pretending to believe them.”

— Elena Gorokhova, [A Mountain of Crumbs](#)

The case for optimism...

- ❑ Trump and Trumpism have lost on the ballot every election since 2016; it is not growing in popularity
- ❑ The fundamentals of the economy have almost always ended up being decisive in an incumbent's reelection – a strong economy in '24 can only help Biden
- ❑ Democrats as a party have overperformed Biden himself; the anti-MAGA coalition strongly supports the Democrats' vision for the country and policies – with the entire party on the ballot, Democratic and Democratic leaning voters will have a reason to vote beyond Biden
- ❑ Trump himself offers the best case for negative partisanship – people will vote just to ensure he does not win
- ❑ Nobody believes Biden will coast to victory: the Democratic activist base will be 100% motivated to work
- ❑ The stakes could not be higher for the anti-MAGA coalition: fear and loathing are rocket fuel for turnout



(It's a big, beautiful world)