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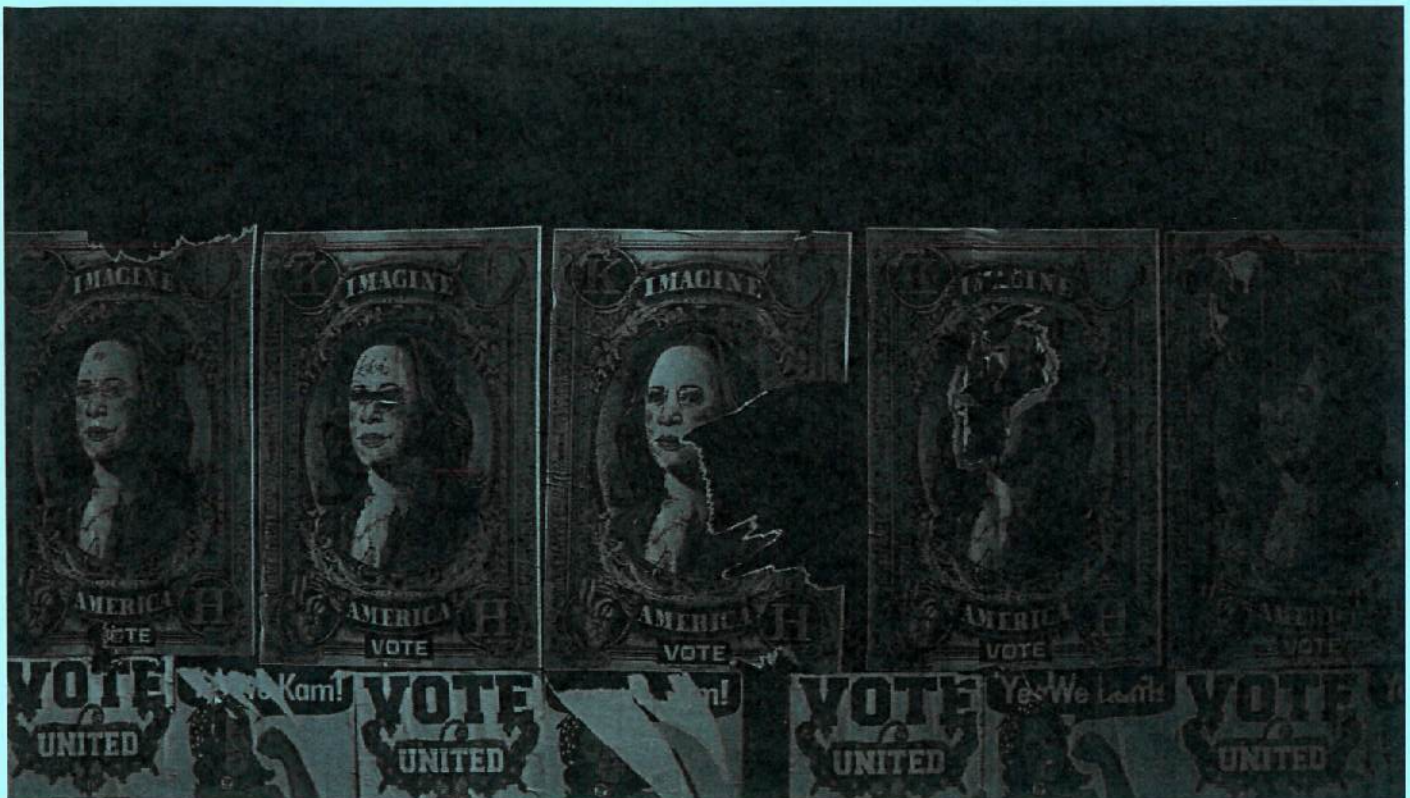
POLITICS

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by **Eric Levitz**

Jan 17, 2025 at 6:00 AM CST



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Posters campaigning for Vice President Kamala Harris during her presidential run are seen on a wall along in Philadelphia. Kent Nishimura/Getty Images



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Donald Trump did not win the 2024 election — the Democratic Party lost it.

So argues Michael Podhorzer, a former political director of the AFL-CIO and author of the highly influential Substack, [Weekend Reading](#).

Podhorzer’s recently published newsletter [on how Trump “won”](#) — he insists on those quotation marks — garnered lots of attention among Democratic insiders. In it, he explains that America didn’t “shift rightward” in 2024 but “couchward.” American voters’ “basic values or priorities” did not become more conservative. Democrats lost merely because turnout among “anti-MAGA” voters collapsed.

Podhorzer does not pair his diagnosis of the Democrats’ woes with any detailed prescription for remedying them. But he suggests that the party does not need to “move right”: Its task isn’t to win over swing voters who sympathize with the Republican message on immigration, crime, inflation, or any other issue. Rather, it is to mobilize young, disaffected anti-Trump voters by alerting them to the dangers of Republican rule and addressing their desire for “systemic change.”

The demobilization of such voters in 2024 had two primary causes, in Podhorzer’s account: First, the media, the Biden administration, and Democrats in Congress all failed to convey the “existential dangers” that a second Trump administration posed. And second, “justifiable disaffection and anger” with a “billionaire-captured system” left many anti-MAGA voters too cynical to bother with the electoral process.

Some aspects of Podhorzer’s analysis are both correct and salutary. He is right to insist that the 2024 election did not reveal a broad mandate for the conservative movement’s agenda. Trump’s national margin was exceptionally narrow and

Republicans just barely managed to eke out a House majority.

This said, I think Podhorzer's big-picture take is wrong. Democrats' problem in 2024 was not merely that it failed to mobilize cynical, anti-Trump voters. The party also lost the arguments over inflation, immigration, and crime to the Republican Party. Trump did not convert a supermajority of Americans to conservatism. But he did convince a critical slice of voters that he was the better option on at least *some* of the issues that they cared about most.

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There are (at least) three problems with Podhorzer's analysis:

**1) Voters who backed Biden in 2020 — and then stayed home in 2024 — are not necessarily resolutely anti-Trump.**

Podhorzer's argument assumes that Biden voters who stayed home in 2024 could not have done so out of sympathy for any of Trump's messages. But there's little basis for that assumption. Low-propensity voters are less ideological than reliable ones, and voters often choose to sit out elections because they are conflicted, agreeing with

*some* of what each party has to say. There's reason to think that this dynamic drove part of the Democrats' turnout problem in 2024: Both polling and geographical voting patterns indicate that low-propensity voters became more Republican-leaning during the Biden era.

## **2) Young, first-time voters turned against the Democratic Party.**

The electorate's youngest voters appear to have been far more right-wing in 2024 than in 2020. This is not a problem that can be attributed to mobilization. Republicans seem to have simply had greater success in appealing to first-time voters last year than they have for a long time.

## **3) In the Biden era, American voters did become more conservative in some of their values and priorities.**

Contrary to Podhorzer's suggestion, there is considerable evidence that voters grew more right-wing in their attitudes toward immigration and criminal justice and more likely to prioritize those issues. Meanwhile, the electorate also grew more confident in the GOP's economic judgement.

Given these realities, if Democrats accept Podhorzer's thesis — and conclude that they do not need to win over Republican-curious voters, but can win solely by mobilizing staunch anti-Trumpers desperate for “systemic change” — they will likely have a more difficult time winning White House in 2028.

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Perhaps more importantly, unless Democrats manage to win over some Trump voters, they will have little hope of winning back Senate control. It is worth remembering that Joe Biden's 2020 coalition only delivered a bare majority in Congress' upper chamber — and that majority hinged on the fluke that was Joe Manchin. Thus, to regain the power to pass legislation and appoint judges without Republican permission, Democrats must not only mobilize their coalition, but broaden it.

RELATED: [The left's comforting myth about why Harris lost](#)

## **If you're losing voters to "the couch," you're probably losing arguments to the other party.**

The foundation of Podhorzer's analysis is one incontrovertible fact: The Democratic Party's presidential vote tally fell by far more between 2020 and 2024 than the GOP's increased. Kamala Harris received 6.26 million fewer votes than Biden had in 2020, while Trump improved on his own tally from four years ago by just 3 million.

When interpreting this drop in Democratic turnout, Podhorzer puts enormous weight on one survey question from AP VoteCast (which is like an exit poll, but more reliable). Each election, VoteCast asks Americans whether they voted primarily "for" their candidate or "against" the other one. Between 2020 and 2024, the percentage of Americans who said they were voting "against" Trump declined considerably. In raw vote terms, the survey implies that 41 million Americans cast a ballot primarily "against Trump" in 2020, while just 26 million did so in 2024.

From these data points, Podhorzer concludes that 1) Democrats didn't lose because the American electorate moved right, but rather because their party's turnout collapsed and 2) that turnout collapse was driven more or less entirely by the demobilization of resolutely anti-Trump voters.

But Podhorzer's interpretation of this data is dubious. The fact that more voters said they were casting a ballot "against Trump" in 2020 than in 2024 does not necessarily mean that disaffected "anti-Trump" voters sat out the latter election en masse.

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For one thing, VoteCast's question forces Democrats to choose between saying they are primarily "for" their party's nominee or "against Trump." Thus, a Democratic voter who wasn't that inspired by Biden in 2020 — but was excited to elect the first Black woman president last year — might have told pollsters she was primarily "anti-Trump" in 2020 but mainly "pro-Harris" in 2024. In Podhorzer's framing, such a person would count as a "missing anti-MAGA voter," since they contributed to the "anti-Trump" total in 2020 but not in 2024. But this hypothetical Democratic voter didn't go anywhere, they just became more passionate about the Democratic

nominee.

And Podhorzer's own data suggests that a lot of Democratic voters fall into this exact bucket. According to the figures he presents from VoteCast, only 25 percent of all voters in 2020 said they were primarily "pro-Biden." Four years later, 32 percent said they were mainly "pro-Harris." Thus, part of the decline in the "primarily anti-Trump" vote is attributable to an increase in Democrats' enthusiasm for their party's standard-bearer.

More critically, just because a given voter cast a ballot "against Trump" in 2020 does not mean that they still strongly opposed him in 2024. And this seems like an especially unsafe assumption to make about a voter who chose to sit out the latter election.

To be clear, it is surely true that many "Biden 2020, Living Room Couch 2024" voters were staunchly anti-Trump. But it's likely that *some* within this bloc chose to abstain last year because they had grown more sympathetic to aspects of Trump's message.

As I've previously noted, the forces that lead a party's voters to switch sides — and the forces that lead them to drop out of the electorate — are often largely the same.

According to a study by the Ohio State University political scientist Jon Green, Obama voters who exhibited high levels of sexism — or agreed with Trump on immigration, gun control, climate change, or another major issue — were more likely than other Obama voters to defect to the GOP in 2016. That isn't terribly surprising. More interesting, however, is that these very same qualities made an Obama voter more likely to sit out the 2016 election. Thus, Trump's advocacy for conservative culture war positions, and exploitation of sexist resentment against Hillary Clinton, simultaneously won over *some* Democratic voters while demobilizing others.

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Green's basic finding — that when voters feel more torn about the choice facing them in an election, they become less likely to turn out — is buttressed by a larger body of political science research. The distinction between persuasion and mobilization is therefore a flawed one: Attempts to persuade swing voters — through direct mail or television ads — often have the effect of demobilizing the other party's base, likely by increasing its ambivalence.

All this provides us with theoretical reasons to suspect that many “missing anti-MAGA” voters became more sympathetic to Republican messaging between 2020 and 2024. And empirical data reinforces this impression.

Polling in 2024 consistently showed Trump gaining ground with disengaged, low-propensity Democratic voters. In May, the New York Times/Siena poll showed Biden (then, the presumptive Democratic nominee) winning only 75 percent of Democratic voters who had sat out the 2022 midterms, even as he won virtually all high-turnout Democrats.

Meanwhile, last year's election results showed that Democrats gained vote-share in neighborhoods that had high turnout rates in 2022 and 2020, but lost ground in neighborhoods that have chronically low turnout rates. Combined with the available polling, this seems indicative of a broad shift toward Trump among constituencies with a low propensity to vote and a history of supporting Democrats.

The most intuitive explanation for this shift is inflation. Low propensity voters tend to be less partisan than reliable voters (and so, more likely to evaluate incumbents on the basis of economic conditions) and less affluent (and so, more likely to resent rapid changes in consumer prices). And a YouGov poll of “disengaged voters” from July 2024 found that “prices and inflation” were their top concern, and that they had more negative views of both the economy and Biden than engaged voters did.

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## **The kids are all right (or, more of them are than in the past)**

Podhorzer’s analysis focuses on the behavior of Biden 2020 voters. He notes that, according to VoteCast, only 4 percent of such voters backed Trump in 2024. From this, he concludes that any movement toward the GOP was negligible.

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But this leaves first-time voters out of the picture. And several data points indicate that such voters were sharply more conservative in 2024 than they had been in the

recent past.

In NBC News's exit poll, Trump won first-time voters by 55 to 44 percent. This was a massive reversal from 2020, when Biden won them by 32 points in the same survey. And a large part of Democrats' woes with first-time voters seems attributable to the declining liberalism of young Americans. In 2020, Biden won voters under 25 by 34 points, according to NBC's exit poll. Four years later, Harris won them by just 11.

Exit polls are highly flawed. But Democrats' performance with young voters looks even worse in more reliable data sources. For example, AP VoteCast shows Harris winning voters under 30 by just 4 points in 2024 after Biden had won them by 25 — a development that suggests the youngest, newly registered voters were unusually rightwing last year.

Meanwhile, election returns show that Democrats lost more ground between 2020 and 2024 in younger parts of the country than in older ones.

Finally, the fact that the youngest zoomers are aberrantly conservative is also apparent in some states' voter registration data. Voters 18 to 25 in North Carolina were more likely to register as Republicans than Democrats over the past four years, a break with that purple state's historical pattern.

It is odd that Podhorzer does not grapple more with this development, since his pre-election analysis presumed that younger voters were so reliably and *overwhelmingly* anti-MAGA, Democrats didn't need to worry about winning over swing voters so long as they energized America's youth. In June 2023, he explained "there's no reason to listen to those who still think Democrats need to focus on winning back Trump-leaning voters instead of simply doing everything necessary to maintain the support of those who have already rejected Trump/MAGA and continue to turn them out, along with mobilizing those voters aging into the electorate." (In the same piece, Podhorzer also argued that there was no reason "to listen to those who panic at any survey which shows Biden substantially behind," as the midterm and special election results "consistently show that the voters in the key Purple states reject MAGA/Trump when the choice is clear.")

One could try to reconcile Gen Z's right turn with Podhorzer's thesis by attributing it entirely to depressed youth turnout among young Democrats. Yet as noted above, polling suggests that politically disengaged Americans were *more* Republican-leaning this cycle than engaged ones.

People's political identities tend to be most malleable when they are young. Therefore, the fact that voters who came of age under Biden were unusually likely to become Republicans seems indicative of a rightward turn in America's political environment — and one that could potentially reverberate for years to come.

RELATED: [How Democratic Gen Z activists lost the Gen Z vote](#)

## **In the Biden era, Americans did grow more conservative in some of their views – and more trustful of Republican economic management**

Podhorzer suggests that America couldn't have shifted "rightward" because voters'

values and priorities are largely stable. As he writes, “A collapse in support for Democrats does not mean that most Americans, especially in Blue America, are suddenly eager to live in an illiberal theocracy.”

But this is a strawman. No one is claiming that the typical resident of California wants to live under an American Taliban. Rather, the question is whether marginal voters — those who lack strong partisan attachments — became either more conservative in their issue preferences or priorities during the Biden era.

And the answer seems to be yes.

This is most apparent on the issue of immigration. In May 2020, 34 percent of voters told Gallup they wanted immigration increased, while just 28 percent said they want it reduced. By June 2024, support for cutting immigration had soared to 55 percent, while that for increasing it had fallen to 16 percent. This marked the first time since 2005 that a majority of Americans had supported cutting admissions.

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Podhorzer notes that Democrats’ support dropped off most steeply in blue states, and

takes this as a sign that America shifted couchward rather than rightward, since he considers it implausible that voters in blue states could have become substantially more conservative.

Yet polls showed voters in New York, California, and Illinois all turning against immigration over the past two years, with 58 percent of Empire State residents agreed with the statement, “New Yorkers have already done enough and should try and slow the flow” of migrants.

Meanwhile, California passed a ballot measure in November that lengthened prison sentences for drug and theft-related crimes, while Oakland and Los Angeles ousted their progressive prosecutors. That same day, Colorado voted to increase minimum prison time for violent offenders.

This punitive turn in blue-state criminal justice policy likely reflects rising popular concern with crime during the Biden era. In Gallup’s polling, the percentage of Americans who considered crime in the United States an “extremely or serious problem” jumped from 51 percent in 2020 to 63 percent in 2023.

If voters grew more conservative in their attitudes toward crime and immigration during the Biden years, they also gave those issues higher priority. Between 2020 and 2024, the percentage of voters who said that immigration was “very important” to their vote in the Pew Research Center’s polling jumped from 52 percent to 61 percent. The share who deemed “violent crime” very important jumped more modestly from 59 to 61 percent.

Finally, it is also clear that voters came to view Republican economic management more favorably over the course of Biden’s presidency. In 2020, voters told Gallup that Democrats were better able to keep America prosperous than Republicans were by a margin of 48 to 47 percent. By 2024, the GOP led on that question by a margin of 50 to 44 percent.

Nostalgia for the pre-inflation, Trump economy seems to have led many voters to reevaluate the Republican’s tenure. In April 2024, a CNN poll found 55 percent of

Americans saying Trump's presidency had been a success, up from 41 percent in January 2021.

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Thus, the America of 2024 was more hostile to immigration, more hardline on criminal justice policy, and more confident in the GOP's superior economic wisdom than the America of 2020. I think that constitutes a rightward shift.

Dismissing Podhorzer's diagnosis of the Democrats' plight does not necessarily compel one to reject his prescriptions for the party's future.

It seems entirely possible that Democrats could win the White House in 2028 without moving right on any issue, not least because Biden and Harris already moderated the party's stances on immigration and crime considerably. At present, Democrats appear more likely to moderate excessively on immigration than insufficiently, with most of the party lining up behind the reckless Laken Riley Act in recent days.

And Podhorzer is surely not wrong that Democrats should seek to increase the salience of Trumpism's most extreme aspects, nor that the party should speak to

voters' discontent with the economic system (although, it is important not to mistake anti-institutional sentiment for lockstep backing of the entire progressive economic agenda).

Nevertheless, I think it's important for Democrats to be clear-eyed about the nature of their problems. The party's failure to retain credibility on economic management, immigration, and crime made some Americans see MAGA in a better light. Some of that failure is attributable to bad luck. But Democrats will still be ill-equipped to preempt similar setbacks in the future if they refuse to admit that this one occurred. Trump really did win the 2024 election. There's no use in denying it.

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