

## The U.S. election shows that sometimes the people get it wrong

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A landslide, some call it. A sweeping victory – or, if you are so disposed, a stunning defeat. What could it all mean?

But wait a minute. Before we delve too deeply into the Meaning of It All, let's be clear: To call this week's presidential election a landslide, or even a significant majority, is complete nonsense, an artifact of two well-known distortions in how the U.S. counts the votes.

One is the Electoral College, or more particularly the winner-take-all system most states use to award electors to the candidates. In the three most hotly contested states – Wisconsin, Michigan and Pennsylvania – the margin of victory averaged 1.1 percentage points, or fewer than 244,000 votes between them.

With a combined 44 Electoral College votes, these states, in turn, made up the margin of victory in the election. As it happens, Donald Trump won all three. Had Kamala Harris won them – had a total of 122,000 voters in the three knife-edge states gone the other way – the headlines the day after would have been Harris Wins rather than Trump Wins, and we would all be having a very different conversation.

The other distortion is temporal: the disjunction between the speed with which the votes are counted – glacial, in some states – and the speed with which pundits weigh in with their assessments of the results.

Based on the returns available in the first day or two after the election, you would have said there was a big swing to the Republicans. Mr. Trump beat Ms. Harris by more than three percentage points, or a little over 4.5 million votes, having lost to Joe Biden by four percentage points in 2020.

As of this writing, however, there are still roughly 12 million votes to be counted, in six western states: California, Oregon, Washington, Colorado, Arizona and Utah. Assuming the remaining votes are distributed in roughly the same proportion as those counted to date, I calculate that Ms. Harris stands to gain another 6.5 million votes, to Mr. Trump's five million. That narrows the gap to roughly three million votes, or just two percentage points: 50 to 48.

Not exactly a landslide. In fact, it's among the narrowest popular-vote wins in U.S. presidential history. Of 60 presidential elections held since 1788, the winner had a wider margin of victory in 47. Even in the Electoral College, where Mr. Trump won 312 to 226, his 58-per-cent majority is in the bottom third.

But never mind. Mr. Trump won, with fully three percentage points more of the popular vote than he got in 2020. True, that was more as a result of the failure of Democratic voters to turn out than any great surge in support for Mr. Trump – when all the votes are counted, Ms. Harris will have received nearly seven million fewer votes than Mr. Biden got last time – but still, a win's a win.

And by now, we know exactly what it all means, thanks to the heroic efforts of a thousand paid opinionators working to tight deadlines. Why, it's as plain as day. Clearly, it was all Ms. Harris's fault. She was too strident, too soft, too Black, too female. But then, it was really Mr. Biden's fault, for sticking around too long.

It's because the Democrats tacked too far to the right, forsaking the working-class voters that are the party's strength. Or rather, it's because they tacked too far to the left, alienating moderate voters with their endless moralizing about identity politics.

No, that's not it. It's because of the economy: Sure, the overall numbers are good, but individual voters weren't feeling it. Sorry, did I say the economy? I meant it was Mr. Biden's stance on the Middle East, which leaned too heavily in favour of Israel and cost Ms. Harris votes among Arab Americans. That is to say, it was his weakness in defence of Israel, which cost her the Jewish vote.

Well, you get the idea. What all of these analyses have in common is that the opinions they attribute to the voters – or at least those voters, a minority by all accounts, who were open to persuasion on any basis whatever, and not simply locked in from the start – just happen to coincide, in every case, with the opinion of the speaker.

It's a well-known phenomenon. It even has a name: the Pundit's Fallacy, an instance of a broader habit of thought known as motivated reasoning. As in: The policy stance that I, A. Pundit, prefer a party should take, ideologically, also happens to be the stance that is most advantageous, politically.

If you're a Democrat, and your own thinking leans to the left, you'll tend to urge the party to move to the left – not because that's your pet philosophy, heavens no, but strictly in the interests of its electoral success. Conversely, if you lean more to the right, you'll find, if you search your heart, that the winning strategy for the party is really to move to the right.

If, then, the party fails electorally, it can only be because it did not move far enough to the left. Or right, as the case may be.

You can see this tendency at work equally in the many instant analyses of why Trump voters voted as they did. If you despise liberal elites, or "woke" cultural warriors, or [your preferred object of loathing here], then your analysis will lean heavily on the theory that it was all because voters also despise the same people or things.

If, likewise, you think the problem with America is that there is too much crime, or that taxes are too high, you will find the seeds of Mr. Trump's victory in these. I have read deep, nuanced thinkpieces on the average Trump voter's deeply nuanced views about the importance of entrepreneurial dynamism, or the virtues of free speech, or the importance of the merit principle, and in every case discovered, to my astonishment, that these also reflected the thinking of the writer.

I don't say these analyses are entirely without merit. Probably some Democratic voters were left cold by the Harris campaign's lack of meaty left-wing policy proposals, or were turned off by the Biden administration's conduct of foreign policy. Probably some Republican voters were excited by Mr. Trump's supposed plan to replace the income tax with an across-the-board tariff.

It's the extension of this to "the voters" – of either party, let alone the electorate as a whole – that strikes me as dodgy. Or rather, no: it's the assumption that most voters are primarily motivated by rational or even explicable considerations that's wrong – the idea that they vote for a candidate or party based on a reasoned appraisal of what the candidate can do for them, or what's best for the country, or anything related to cause and effect.

The evidence against this has been accumulating for some years, in books such as *The Myth of the Rational Voter: Why Democracies Choose Bad Policies*, by Bryan Caplan, and *Democracy for Realists: Why Elections Do Not Produce Responsive Government*, by Christopher Achen and Larry Bartels. Their research shows voters are more likely to make decisions based on factors such as social identity or partisan loyalty, as filtered through an assortment of prejudices and cognitive biases.

That was true of democracies generally – and long before the advent of social media, state-based disinformation campaigns and other mechanisms by which large sections of the populace across the democratic world have been driven, not to put too fine a point on it, mad.

But now apply that to the chaos of contemporary America, with its ingrained partisan identities (nearly half the country's voters are formally registered as supporters of one party or the other) and entrenched social divisions. Particularly toxic are those centred on education, expertise and knowledge – in brief, whether anyone knows anything, least of all the folks who are supposed to; whether facts matter, or can be established with any certainty, or even just agreed upon, or whether everyone is entitled to their own facts.

In particular, apply it to Trump voters. This is not a comment about Republicans, or conservatives, or populists. It is a comment about the type of voter who is drawn to Mr. Trump: who is willing or eager to mark their ballot for someone as manifestly, palpably, incontrovertibly unfit for public office, not only in his own character and abilities, but for what he represents, including his attacks on the rule of law, basic freedoms and democracy itself.

To persist in the belief, nevertheless, that he is an appropriate or wise choice for president, requires a culpable error, of one sort or another: either an astonishing ignorance, nine years after he entered the political arena, of the things he has done and said; or an irrational disbelief, in the face of all the evidence, that he means it; or an amoral apathy, so long as he annoys the right people and keeps the Democrats out; or, in the worst case, active approval.

Don't get me wrong. There are rational or at least explicable reasons why a voter might be ticked off at the Democrats, whether for any of the reasons listed above, or simply because they happen to be in office at a time, postpandemic, postinflation, when voters everywhere are furious with incumbents. An analysis by the Financial Times finds that every governing party of a major democracy that has faced election this year, 10 in all, has suffered a decline in its share of the vote – the first time this has happened, ever, or at least since records were kept (that's going back to 1905).

But that is an entirely separate question from whether it is rational, in response, to vote for a candidate such as Mr. Trump. The Biden administration made its share of mistakes; Ms. Harris has her flaws; the American economy could be performing better (though quite honestly it's hard to see how); identity politics has a lot to answer for. But the notion that any of these, or all of them, represent such a dire threat, such an emergency, as to justify a "remedy" such as Mr. Trump – there is no other word for this but irrational.

It is not polite to say this. The notion that "the people are always right" is a staple of democratic discourse. And there is much truth in this. Indeed, I have often been forced to acknowledge it myself – the issue in which I had been so heavily invested, the factors that I had felt sure really ought to decide this or that election, proved, in the fullness of time, not to be of such overwhelming importance as all

that, at least when set beside all the many other issues and considerations that combine, by some extraordinary alchemy, to produce a vote.

The average voter, busy as they are with the regular distractions of life, may take a broader and I dare say better view of things than the full-time pundit, too caught up in the day-to-day minutiae of politics. But it is not necessarily true, always and everywhere. Indeed, it can't be true for all voters – in any election, the abiding wisdom of the majority must be set against what is presumably the abject folly of the minority.

Who's to say we must necessarily pay homage to the former, just because they slightly outnumber the latter? Sometimes the people – some of the people at any rate – get it wrong. Especially the people who say the reason they voted for Donald Trump is that he is a “man of God,” or will “get tough with Russia,” or “cares about people like me.”

It is expected of politicians, especially losing politicians, that they must nevertheless grit their teeth and mouth the words, “The people are always right.” But such pieties are not required of columnists.