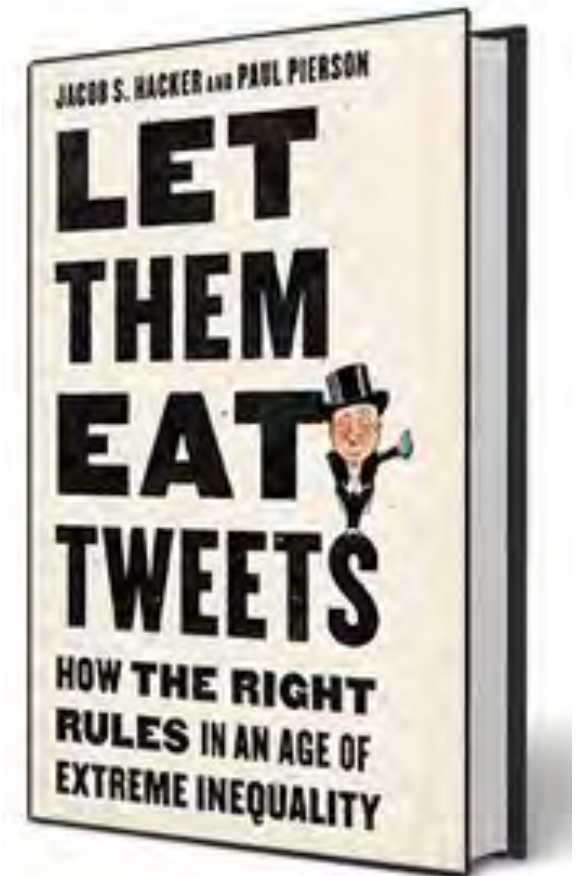
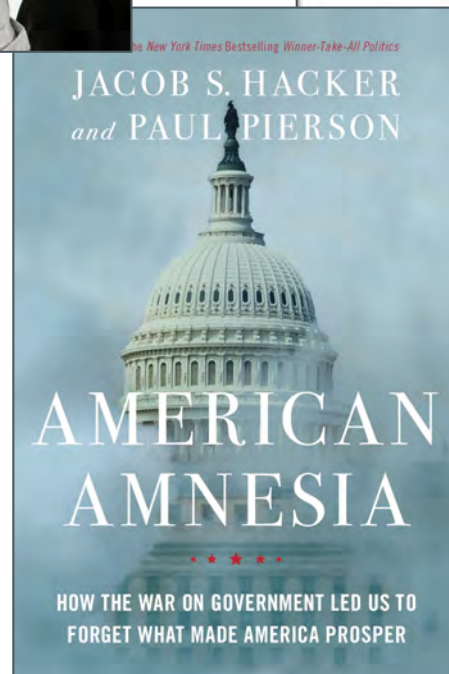
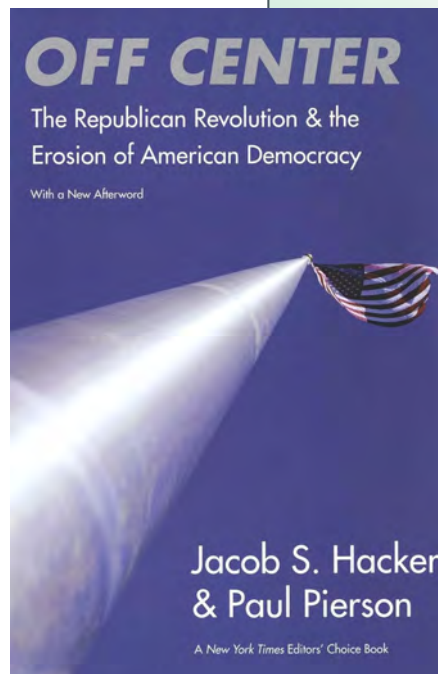
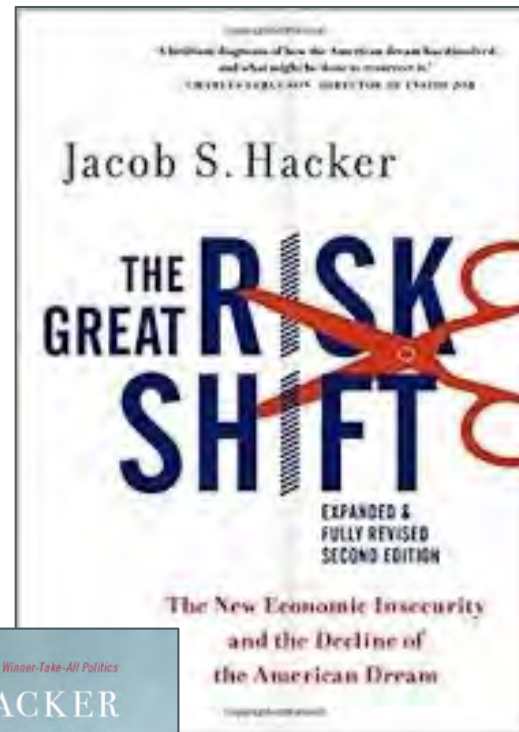


America's Democratic Party and the Crisis of American Democracy

Max-Planck-Institut für Gesellschaftsforschung Lecture
19 November 2025

Jacob S. Hacker

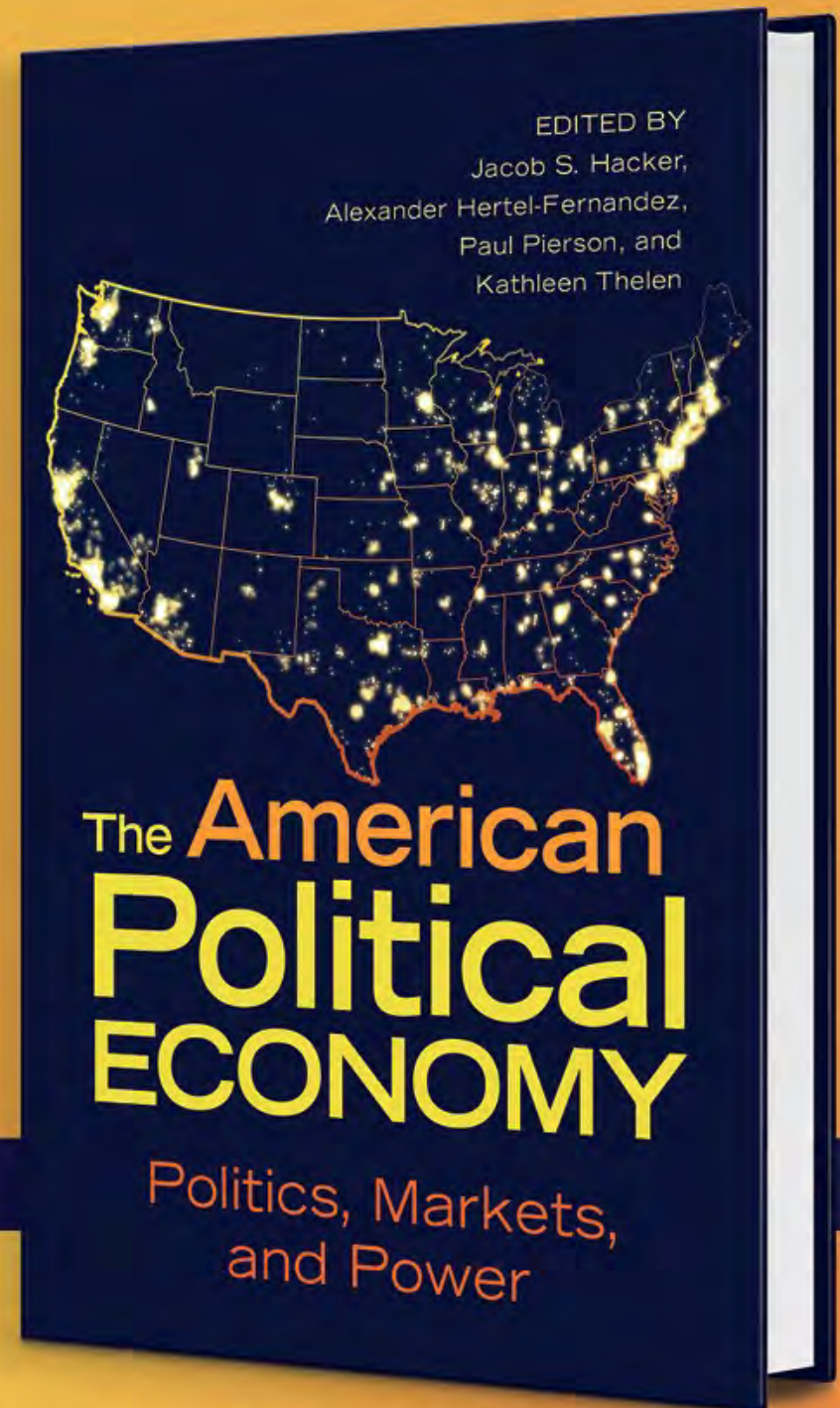
American Political Economy Fellow, American Academy in Berlin
Stanley Resor Professor of Political Science, Yale University
jacob.hacker@yale.edu



EDITED BY
Jacob S. Hacker,
Alexander Hertel-Fernandez,
Paul Pierson and
Kathleen Thelen

The American Political ECONOMY

Politics, Markets,
and Power



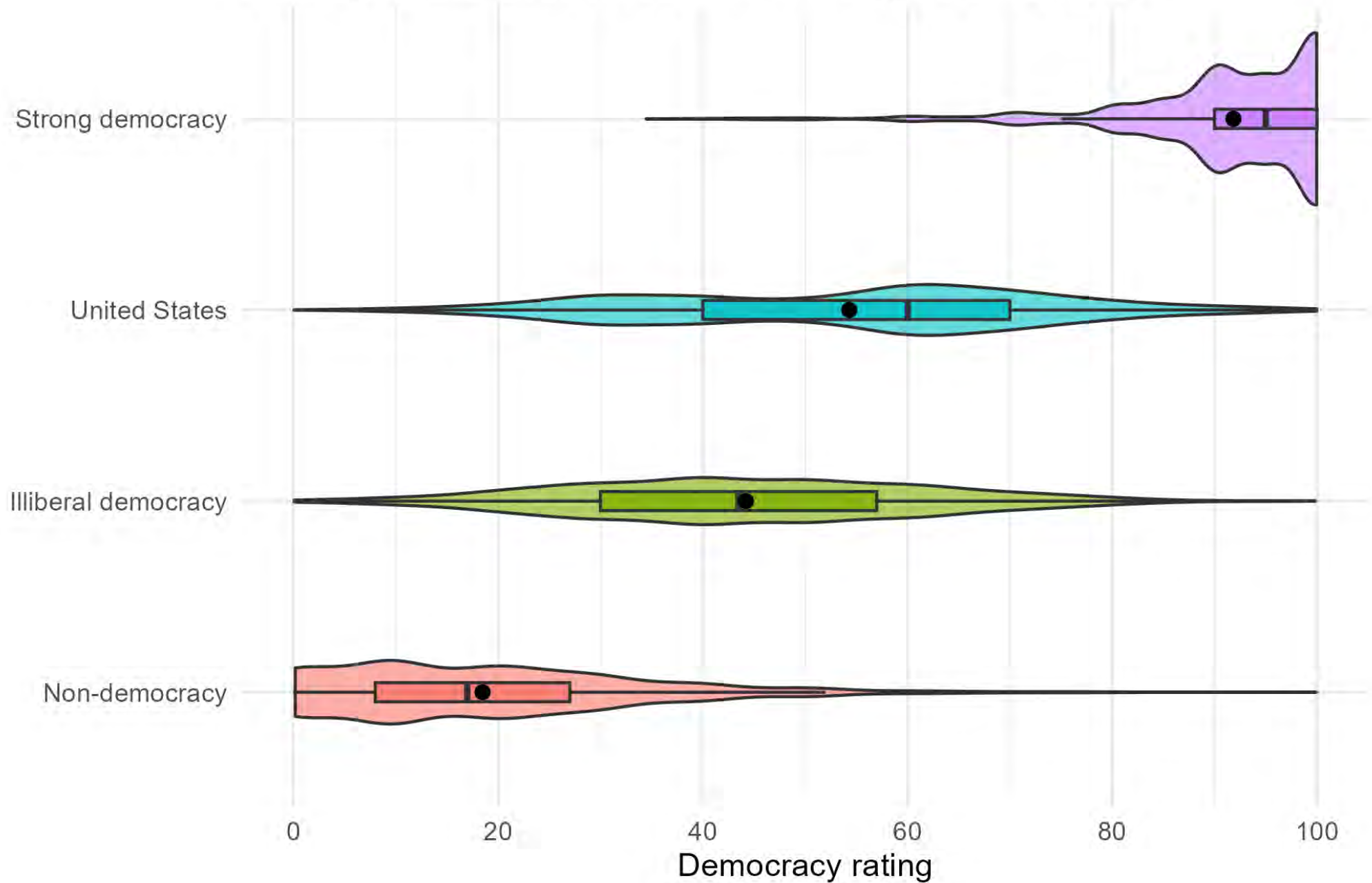
A Map of this Talk

1. The Crisis of American Democracy
2. The Crisis of America's Democrats
3. (How) Can the Crises be Overcome?

I

The Crisis of American Democracy

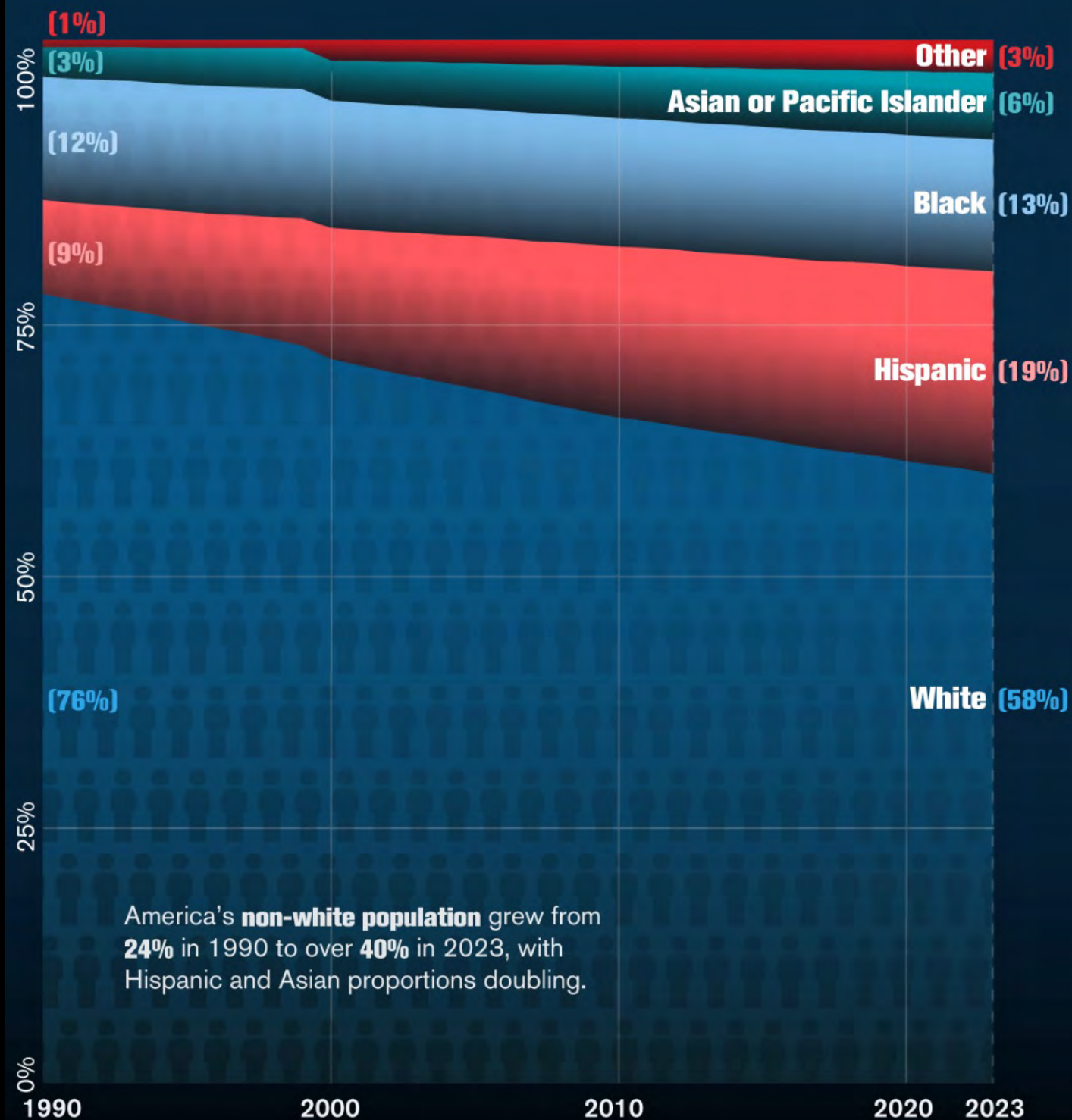
Ratings of the U.S. versus different types of regimes



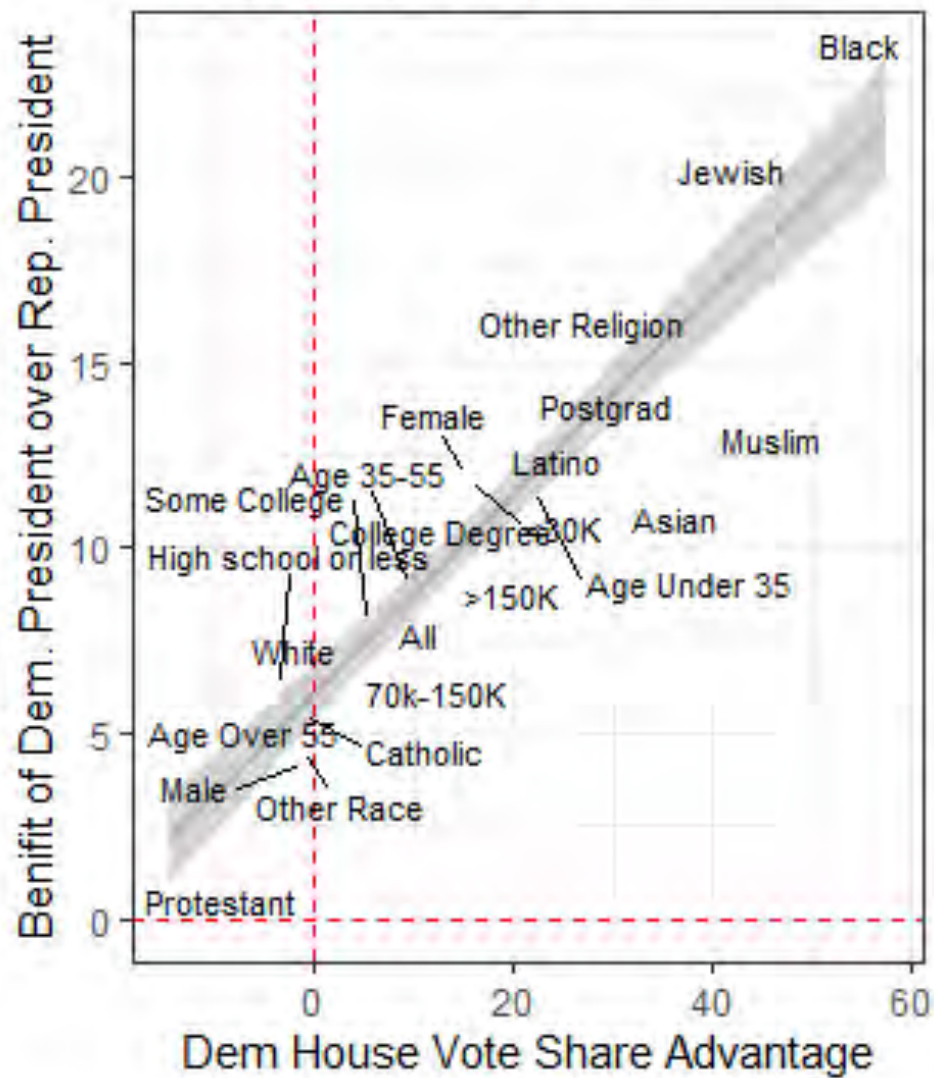
Why the United States??!



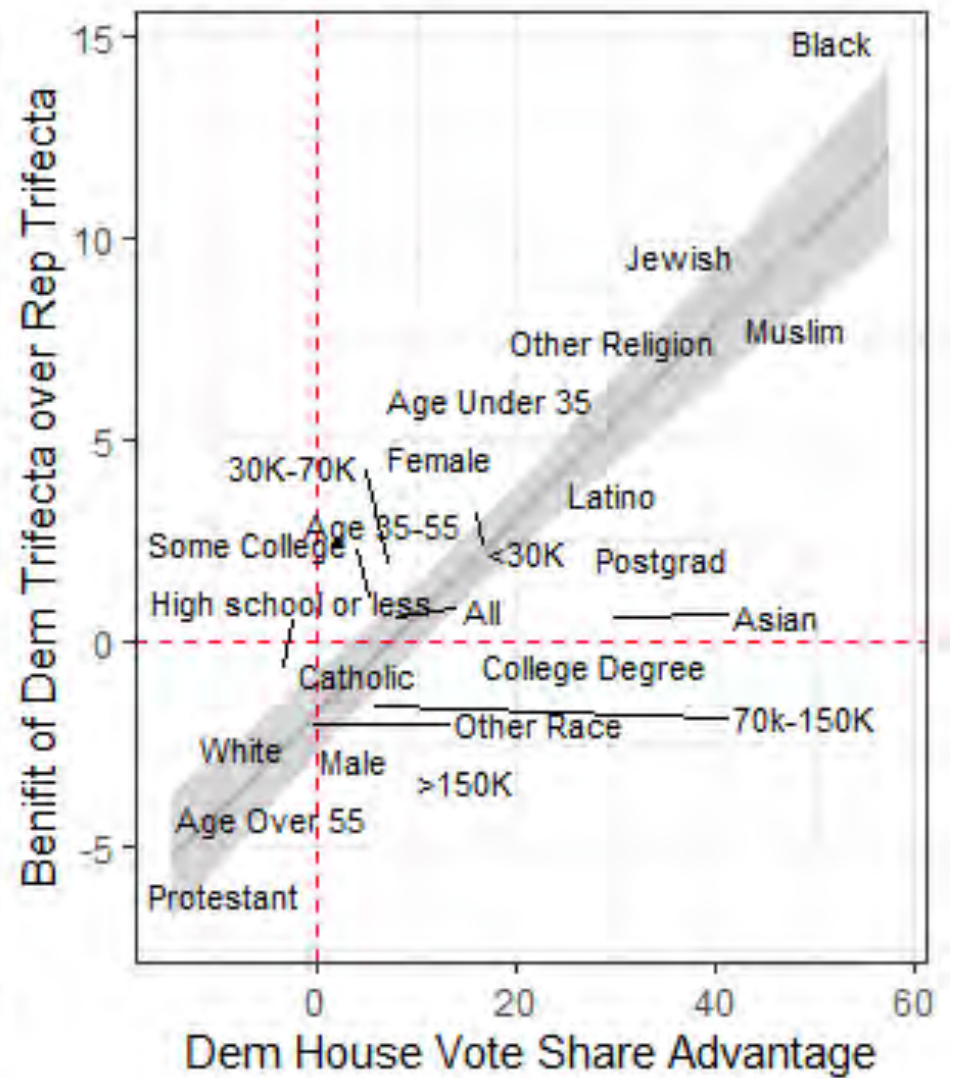
- U.S. Republicans' distinctive "Plutocratic Populism"
 - "Formative rift" over race
 - Extreme inequality/rise of oligarchy
- U.S. Constitutional framework *extremely* vulnerable



4.1 Presidential Control

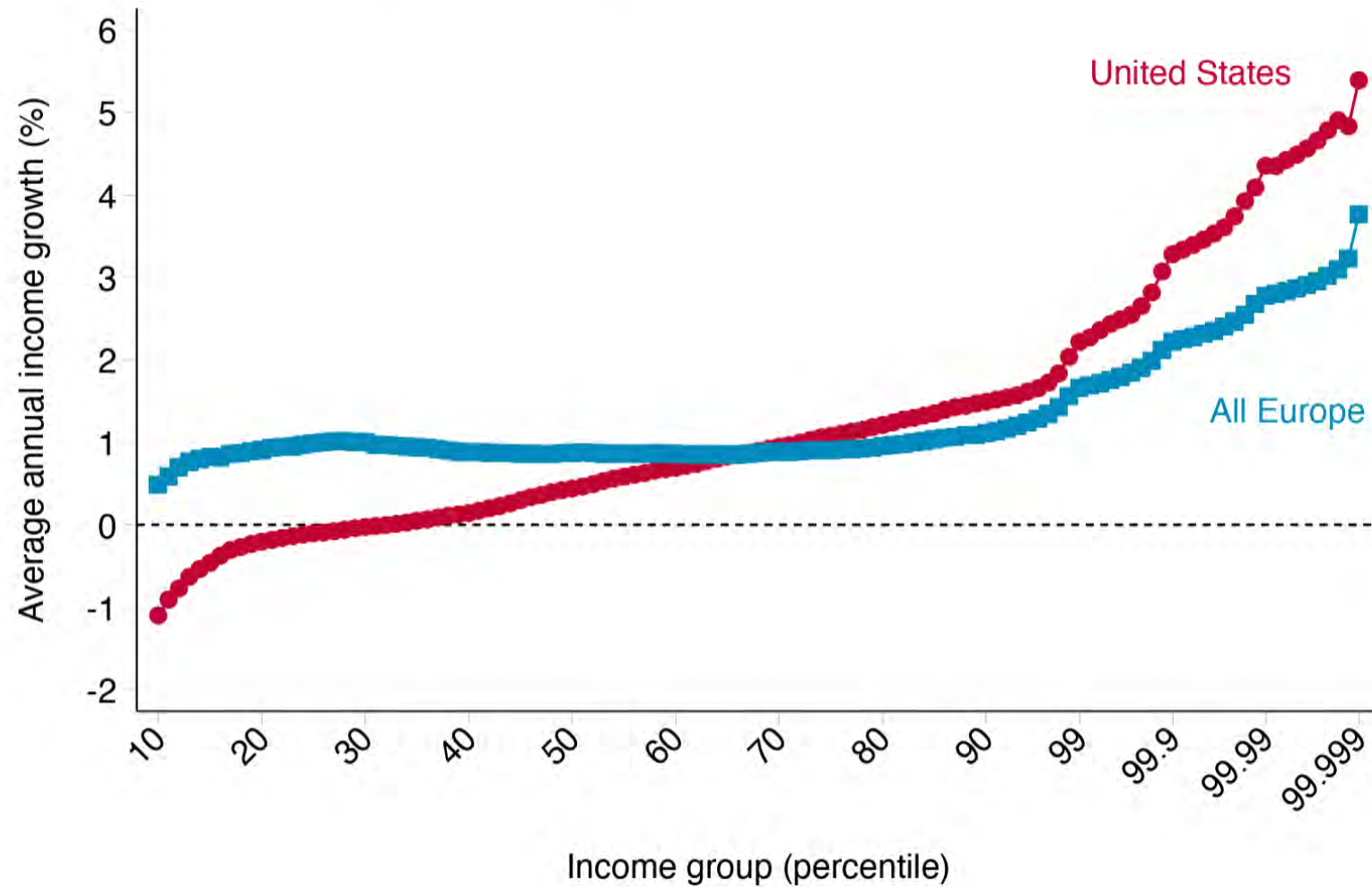


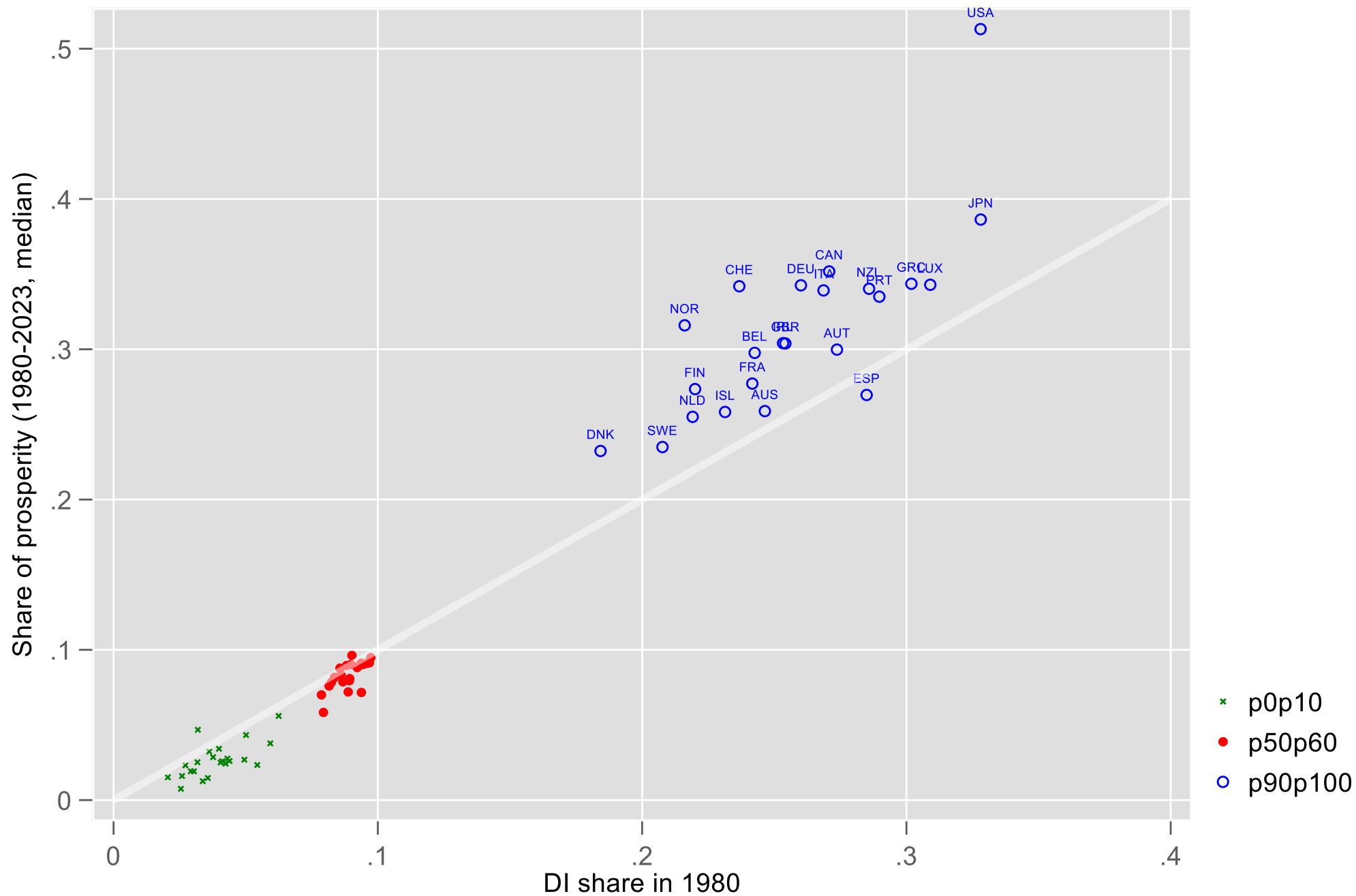
4.2 Trifectas



The Distribution of Pretax Income Growth in Europe and the United States, 1980-2017

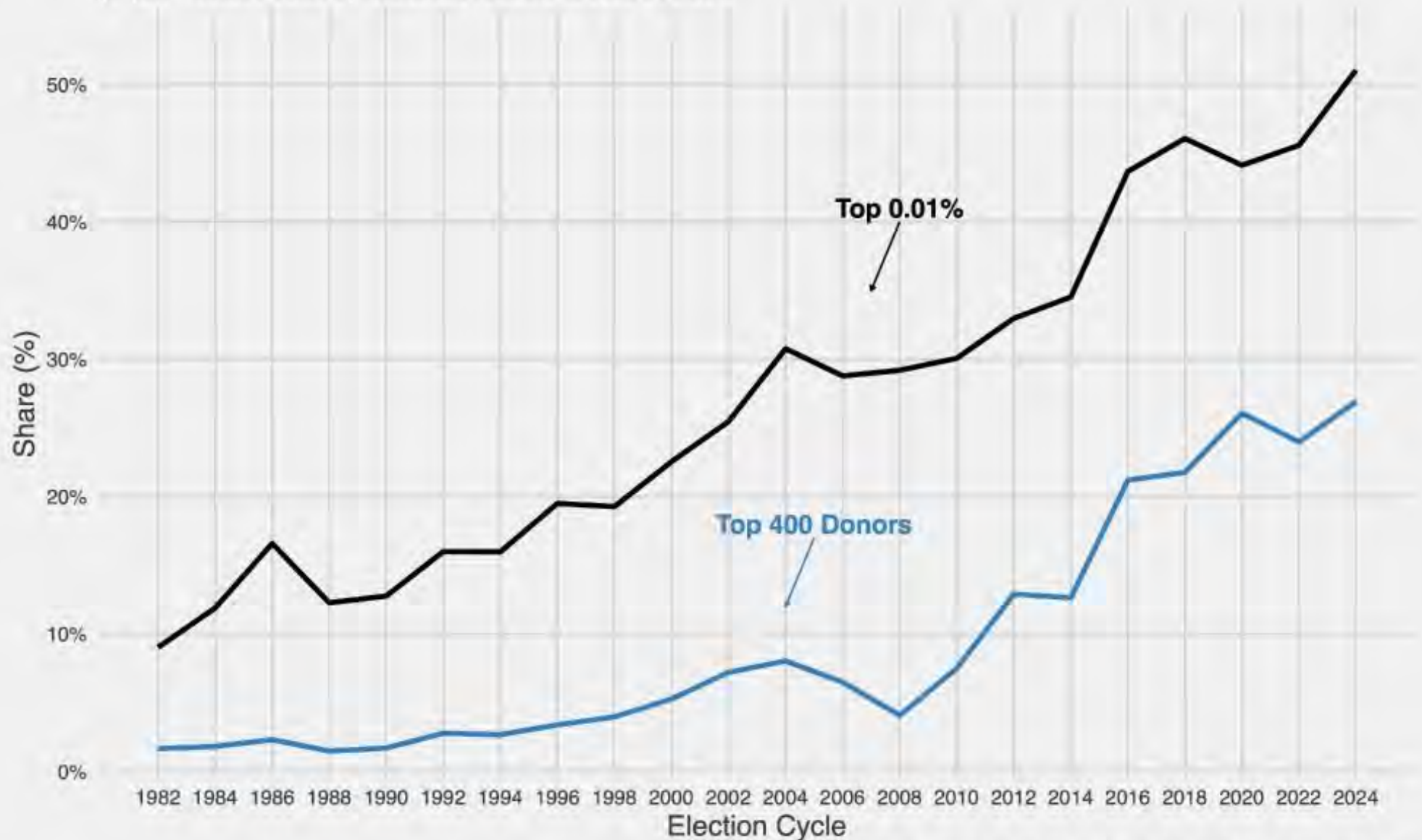
(b) Average Annual Pretax Income Growth by Percentile





Campaign Funding Increasingly Dominated by the Ultra-Wealthy

Shares of federal contributions from the top 0.01% of VAP (1 per 10,000 voters) and the top 400 donors (1 per ~650K voters) reached record levels in 2024



Source: Database on Ideology, Money in Politics, and Elections (DIME).

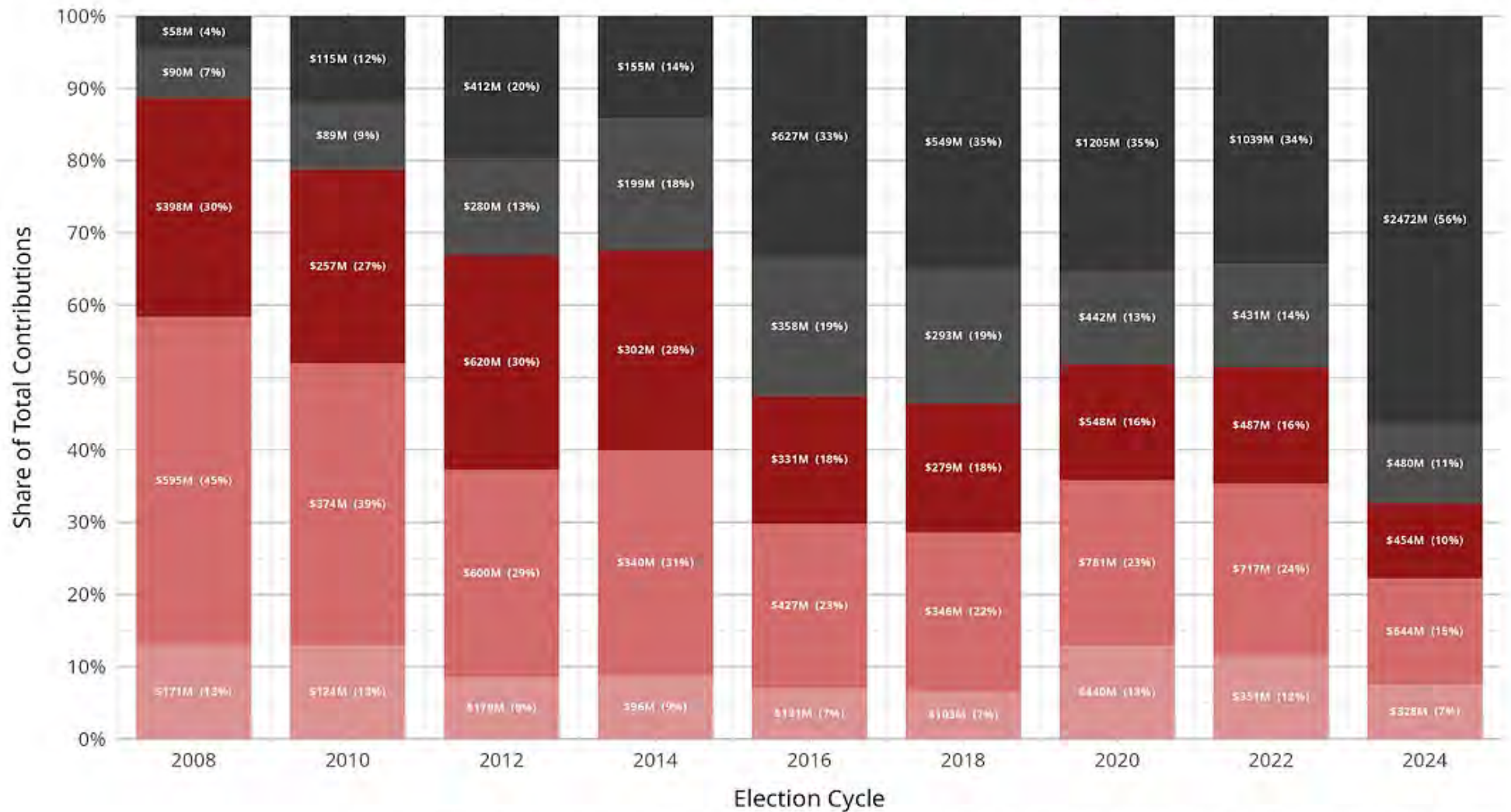
Note: The top 0.01% share in 2022 is the top 26,072 donors, or 0.01% of the 260.7 million voting-age adults according to the Census.

Fundraising Shares for Republicans by Cycle

Share of total campaign contributions by donor size, 2008-2024

Donor Size by Aggregate Amount Donated During Election Cycle

Over \$1M \$100K to \$1M \$10K to \$100K \$1K to \$10K Under \$1K

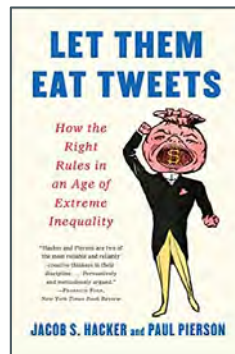


Note: Total dollar amounts (in millions of \$) from each donor group shown within bars. Shares as a percentage of total fundraising are in parentheses. Includes all donations from individuals to federal candidates, committees, and party-aligned Super PACs and 527s. Source: Database on Ideology, Money in Politics, and Elections (DIME) and the Federal Election Commission (FEC).

“Plutocratic Populism”

Plutocratic: With rise of extreme inequality, corporations & conservative superrich increasingly central to GOP priorities & strength

Organized forces=Koch network, Chamber of Commerce, ALEC, Federalist Society, etc.

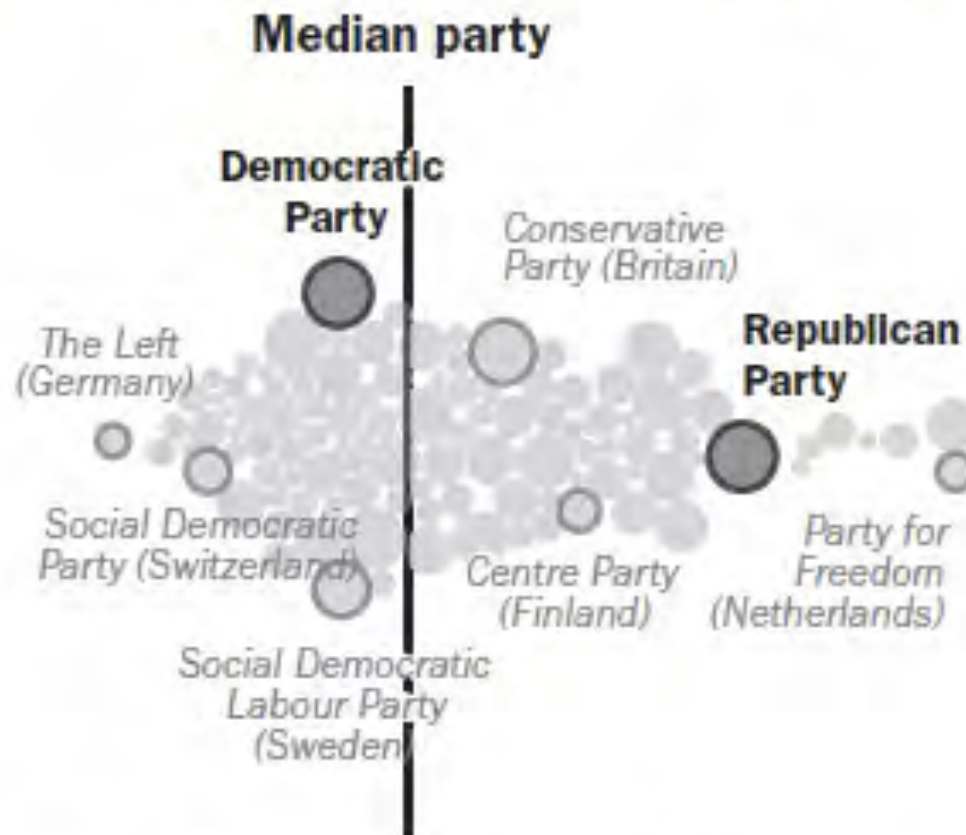


(Right-Wing) Populism: Intensifying ethno-nationalist appeals by elites & surrogate groups to voter base not enthused by plutocratic priorities

Organized forces=Christian Right, NRA, right-wing media, etc.

**Growing attraction to
anti-democratic rhetoric/strategies**

IDEOLOGICAL POSITIONING OF POLITICAL PARTIES IN WESTERN EUROPE, CANADA, AND THE UNITED STATES



**Right Wing
Populism in
U.S. is Not
Unusually
Popular,
But it is
Unusually
Powerful.**

Source: Sahil Chinoy, "What Happened to America's Political Center of Gravity," *New York Times*, June 26, 2019, <https://www.nytimes.com/interactive/2019/06/26/opinion/sunday/republican-platform-far-right.html>.

Circles sized by the percentage of the vote won by the party in the latest election in this data.

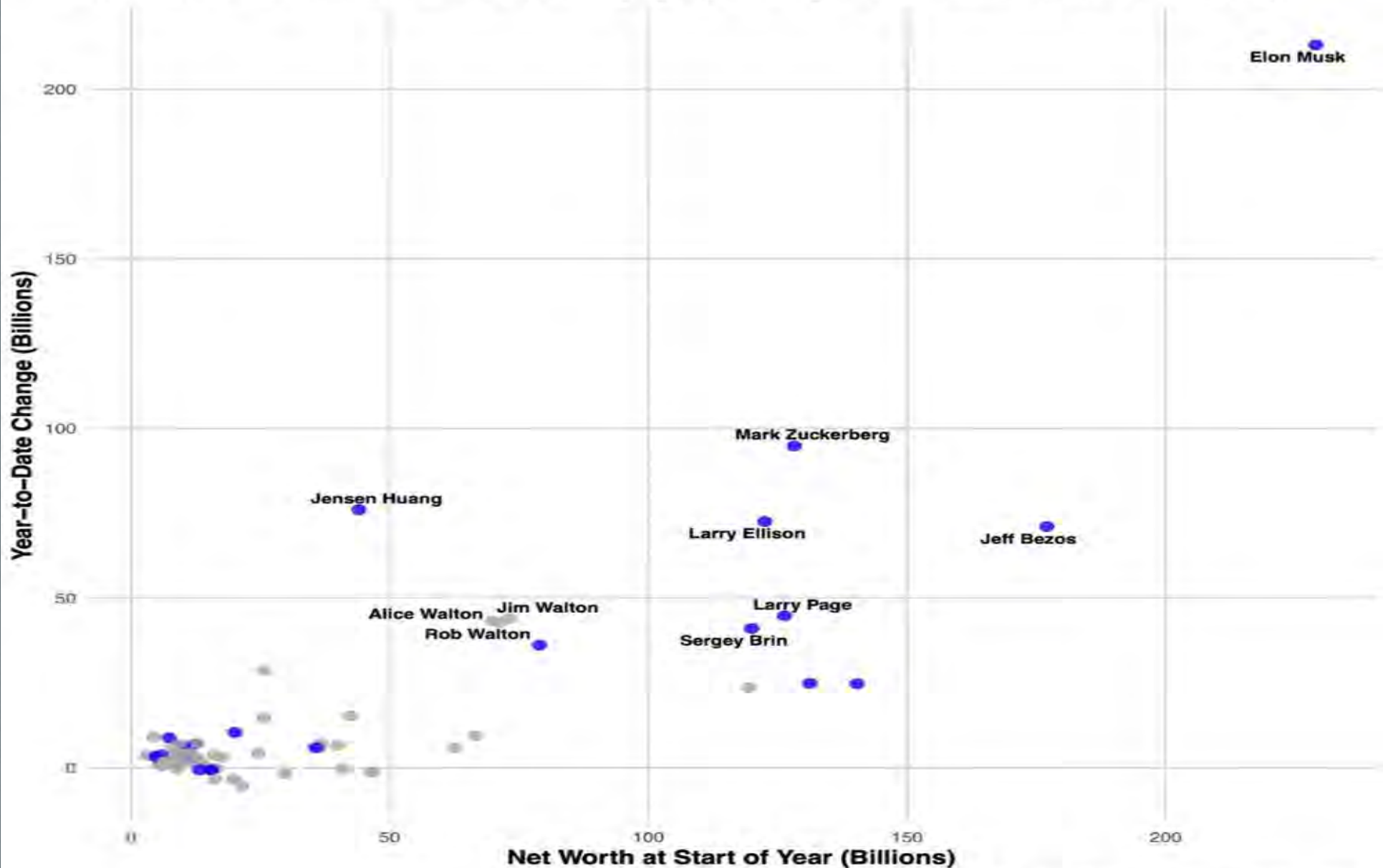
Only parties that won more than 1 percent of the vote and are still in existence are shown.

Analysis is based on party campaign platforms, as coded by the Manifestos Project



The Billionaire Boom: Inequality Grows Even at The Very, Very, Very Top

In 2024, starting wealth was the biggest driver of billionaire gains. Among the 100 richest Americans, the top 10 now control 50% of their combined wealth of \$4,046B—highlighting an even greater concentration of wealth at the very top.



Source: Bloomberg Billionaires Index (<https://www.bloomberg.com/billionaires/>).

Note: Tech sector billionaires indicated in blue.

Influence Runs Both Ways, But Increasingly From Trump

- Note prominence of “Attention Merchants”
 - Platforms generate vast wealth *and* vulnerability
 - Thelen: Cloud computing/AI highly capital intensive
 - Weaponization of administrative state (*regulatory protection racket*). SEC, FCC, DOJ, IRS, FBI)
- President’s Potential Leverage Over:
 - Traditional media (Washington Post, LA Times; ABC, CBS settling lawsuits w/payouts, etc.)
 - New Media (Facebook, TikTok)
 - All Corporations (e.g. Tariffs)



Why the United States??!



- U.S. Republicans' Distinctive “Plutocratic Populism”
 - “Formative Rift” Over Race
 - Extreme inequality/rise of oligarchy
- U.S. Constitutional framework *extremely* vulnerable
 - Ease of capturing a party
 - Breakdown of Madisonian checks and balances w/ extreme party “team”
 - Fundamental biases against metro-based, pro-government party—that is, Democrats [next part]

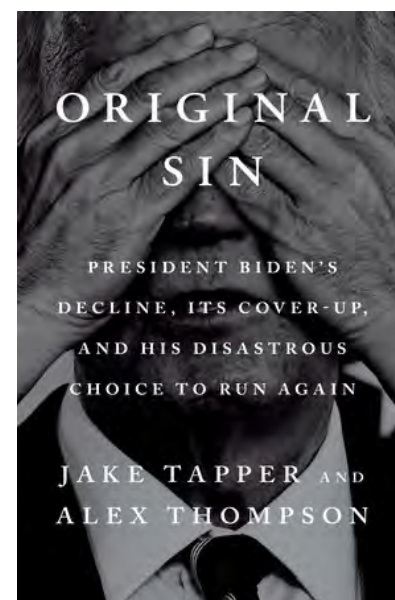
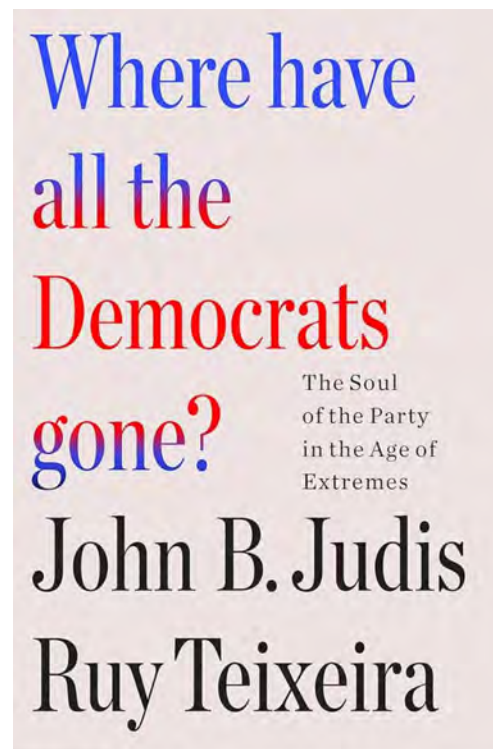
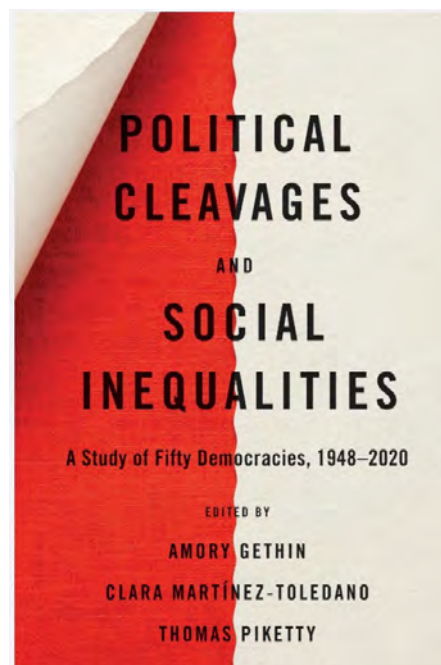
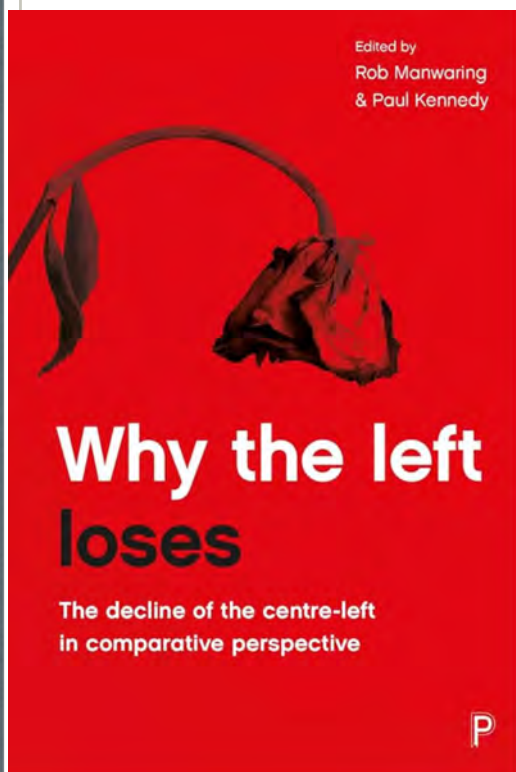
American Authoritarianism

- Rise of “Strongman Presidency” (Moe & Howell)
 - Massive corruption
 - Packing of “power ministries” with loyalists
 - “Weaponization” of agencies (FCC, DOJ, etc.)
 - Attacks on civil society (universities, media, law firms, labor)
 - MAGA-fication of security forces
- Collapse of “checks & balances”: Courts, Congress, perhaps checks on military use in domestic affairs
- Intensified efforts to tilt 2026 midterm elections (gerrymandering, voter suppression/intimidation)

II

The Crisis of America's Democrats





SHOUTS & MURMURS



THIS ELECTION JUST PROVES
WHAT I ALREADY BELIEVED

BY RIVER CLEGG

The Center-Left in the Knowledge Economy (KE): A Tragedy in Three Acts

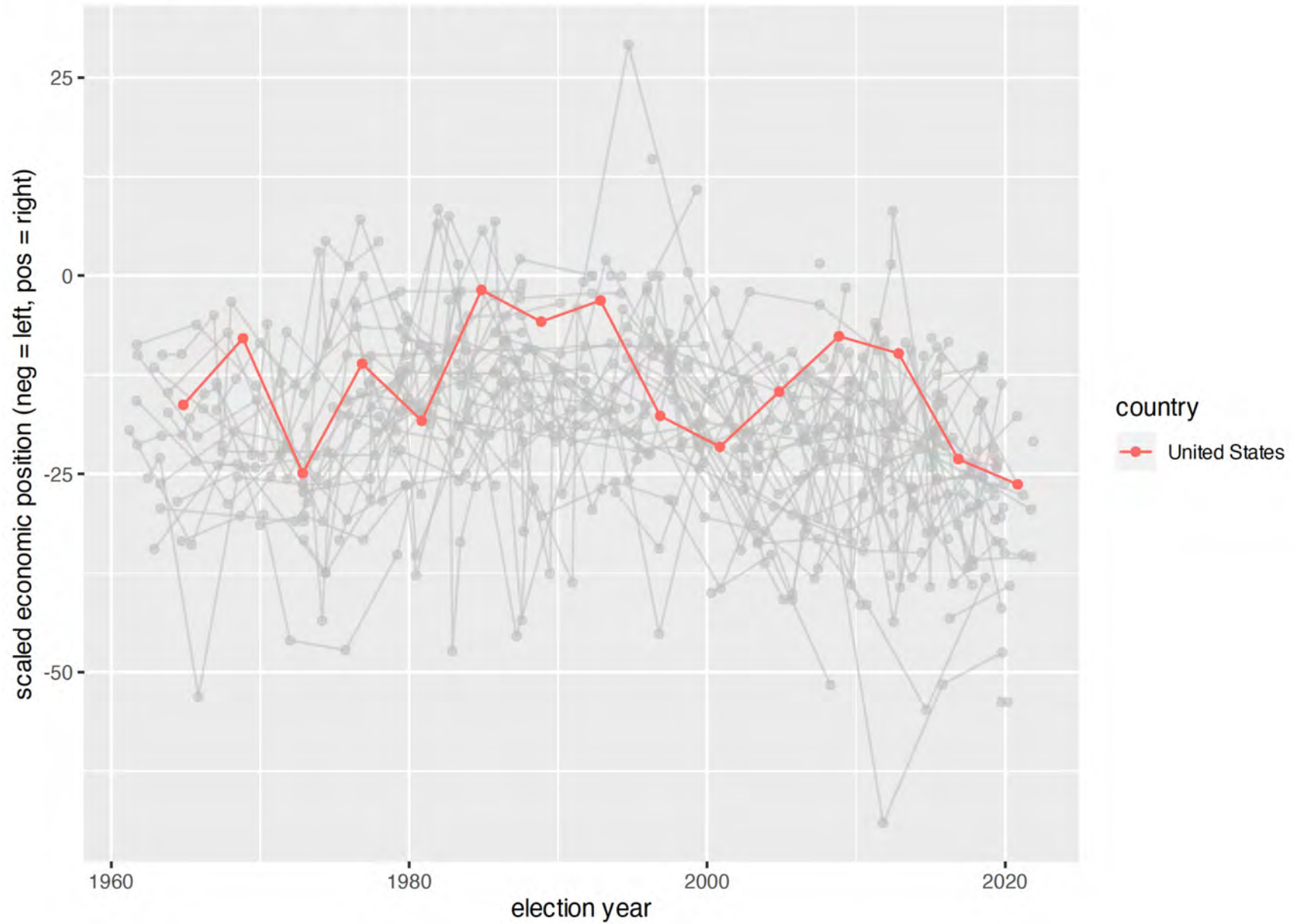
Act I: The Neoliberal Turn

Act II: The Long Political Tail of the Financial Crisis

Act III: The “Brahmin Left” vs. Right-Wing Populism

- **The KE professional class over the working class**
- **Social liberalism over economic liberalism** (growing literature, including role of media)
- **KE agglomeration = safe urban districts = increasing left electoral inefficiency and fractionalization**

Social Democratic Party Positions, OECD countries

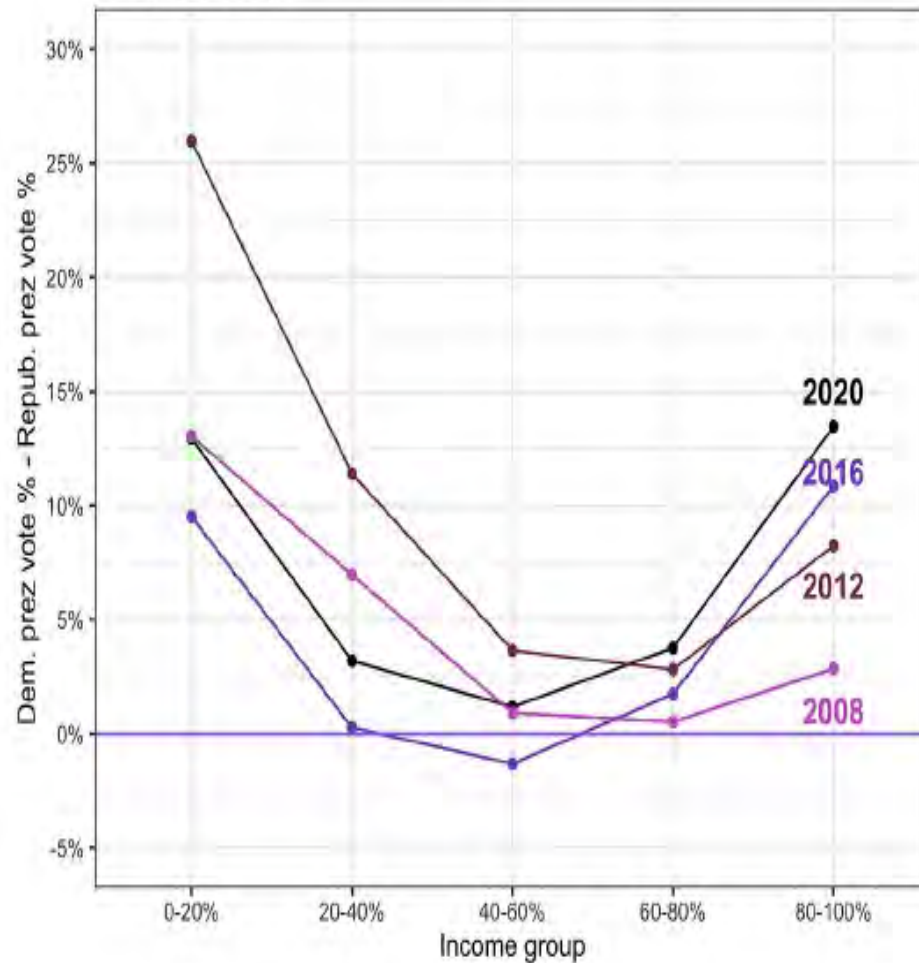


Crisis of the Center-Left

- Exodus of white working class/rise of KE→decline/transformation
 - Multi-racial, cross-class party centered in metro America
- Yet even compared with center-left parties in other majoritarian democracies, U.S. Democrats look pretty good
 - Vote share (though vote→power is biased)
 - Governance (though U.S. unified power rare)—e.g., 2021-22
 - 2024 was a global story of incumbent loss
- Still, Democratic Party ill-equipped against plutocratic populism—especially today
 - System biased against party of density
 - Electorate biased against party of the system

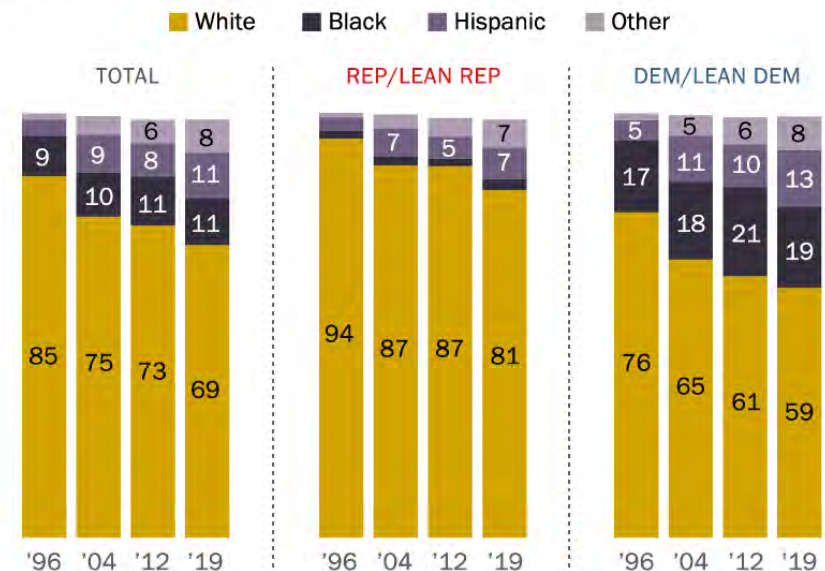
Democrats are Really Economically and Racially/Ethnically Diverse

Democratic Presidential Vote Margin by Income Groups
CES (2008-2020)



Nonwhites make up four-in-ten Democratic voters but fewer than a fifth of Republican voters

% of registered voters who are ...



Notes: Based on registered voters. Whites and blacks include only those who are not Hispanic; Hispanics are of any race. Don't know/Refused responses not shown.

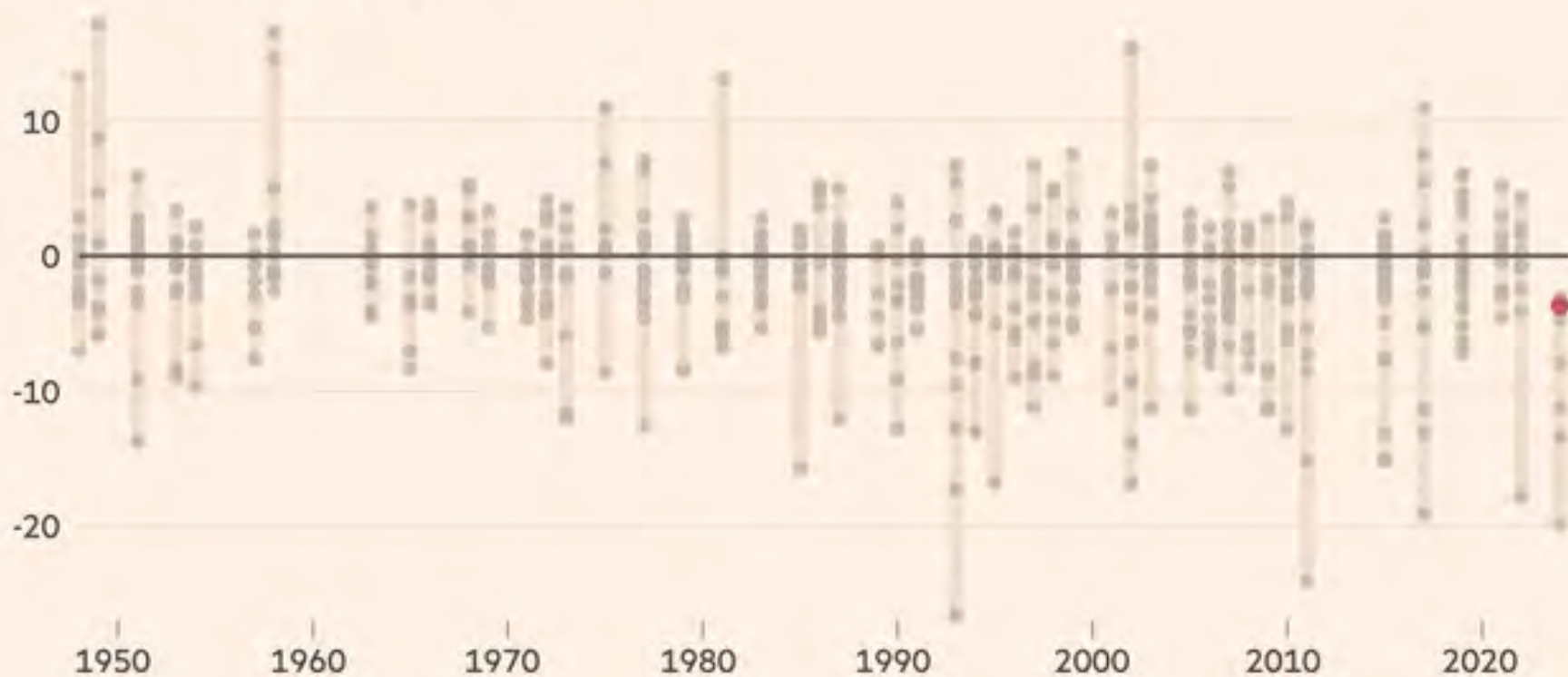
Source: Annual totals of Pew Research Center survey data (U.S. adults).

PEW RESEARCH CENTER

Every governing party facing election in a developed country this year lost vote share, the first time this has ever happened

Rise/fall in vote share for governing parties in national elections (% pts), by year

● Individual election ● US 2024



Excludes years where fewer than five countries had elections

FT graphic: John Burn-Murdoch / @burnmurdoch

Sources: [ParlGov](#), FT research

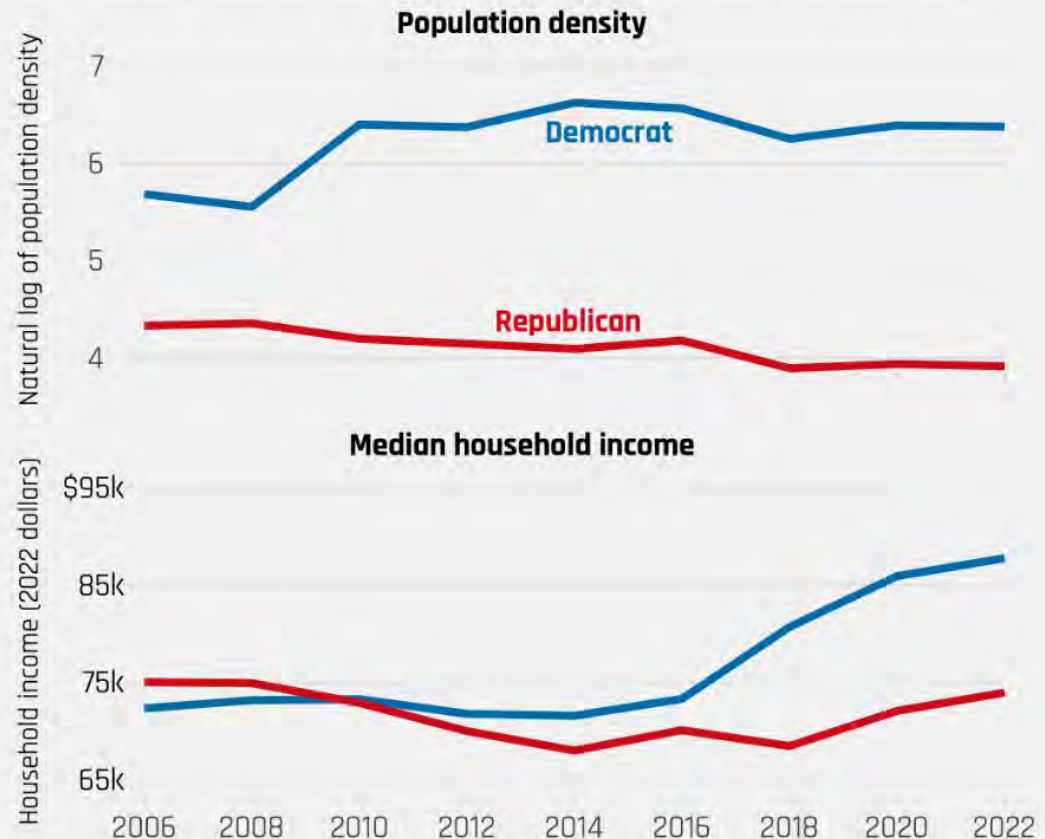
©FT

Density Paradox: Big rewards for density in the economy, big penalties for it in American politics.

- Density central to economic growth in KE
- US political system biased *against* density:
 - Unusually territorial (Senate, Electoral College, Single-Member Districts in House and Statehouses)
 - Rewards parties whose voters are broadly distributed rather than concentrated

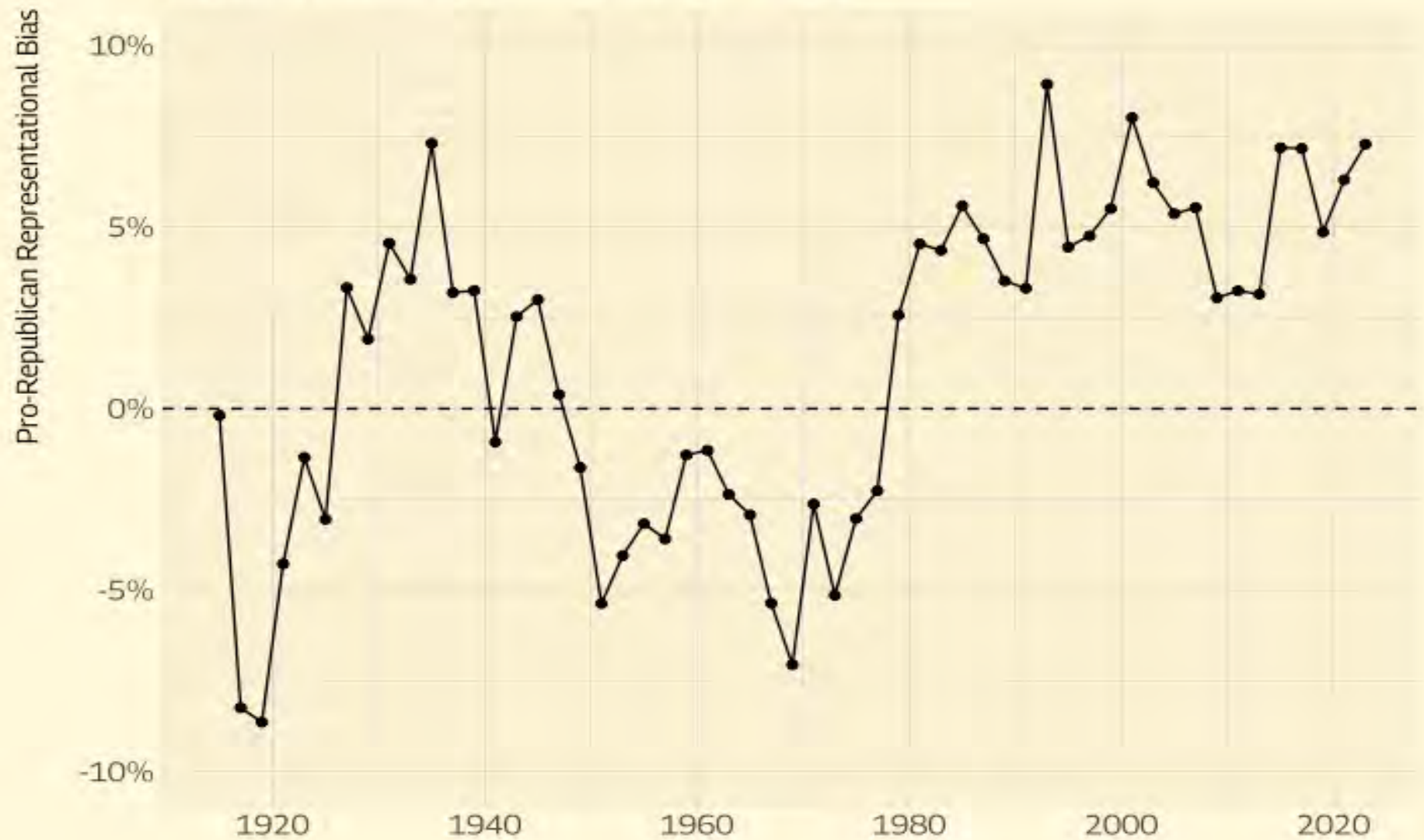
Place and prosperity divide the U.S. electorate

The average density (top panel) and median income (bottom panel) of congressional districts won by Democrats and Republicans, 2006–2022



Source: Authors' calculations using data from the MIT Elections Lab, U.S. House of Representatives' Office of the Clerk, American Community Survey 5-year estimates, and the Consumer Price Index.

The Senate has had a pro-Republican representation bias since 1979



Bias is measured as share of Senate seats minus share of population represented by those seats. Graphic by Lee Drutman

■ Injunction Left in Place ■ Injunction Lifted by SCOTUS ■ Lifted (Post-CASA Narrowing)

Biden Administration

Lower courts blocked policies in **22** cases.

INJUNCTIONS/TROS LIFTED BY SCOTUS



14%

of injunctions lifted
(3 of 22)

Trump Administration

Lower courts blocked policies in **86** cases.

INJUNCTIONS/TROS LIFTED BY SCOTUS



77%

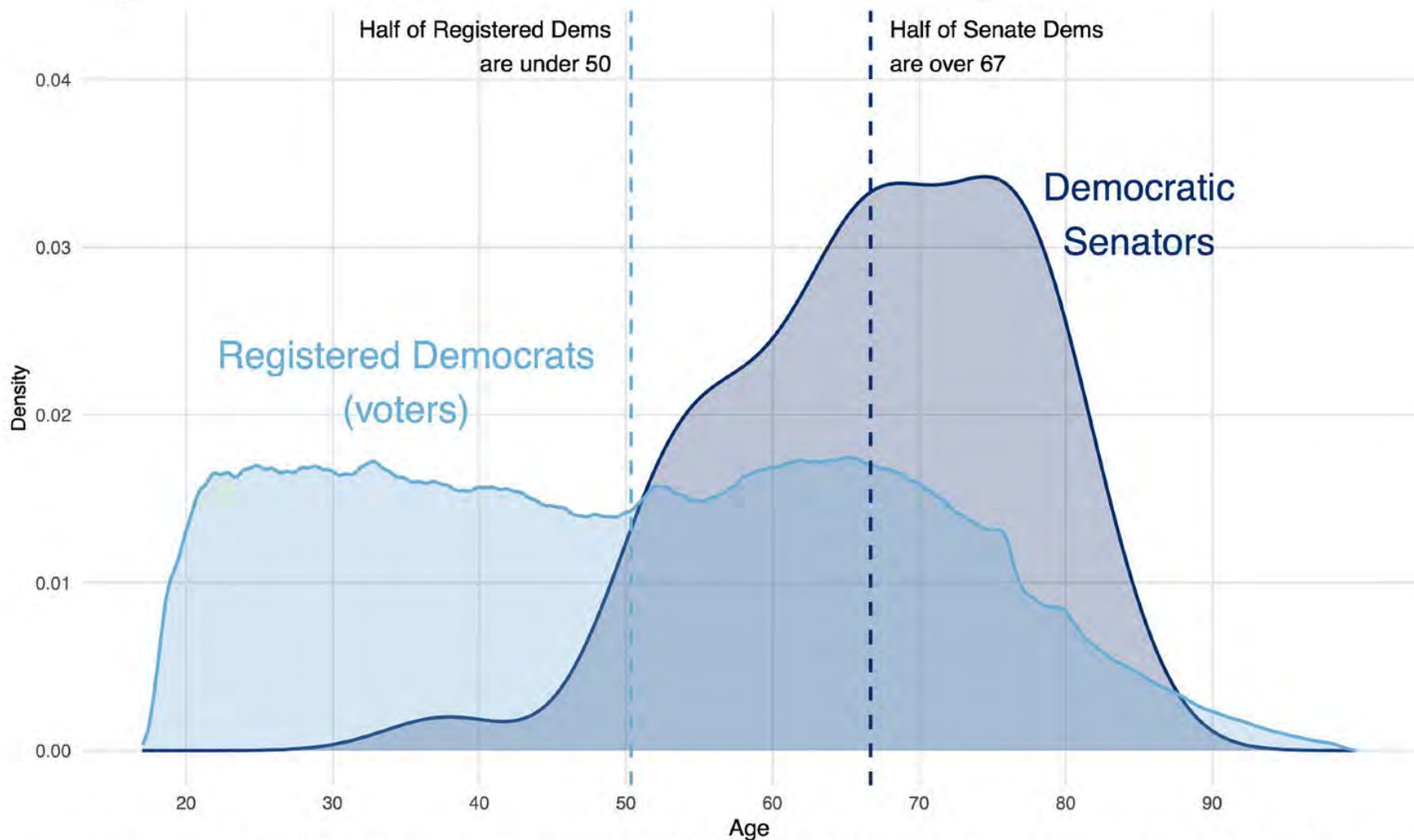
of injunctions lifted
(66 of 86)



Democrats' "Brand" Problem

- Seen as
 - party of educated elites
 - too far left on many social issues
 - less able to secure prosperity
 - geriatric
 - **"establishment," protector of status quo**
- Democrats have limited influence on how their brand gets defined

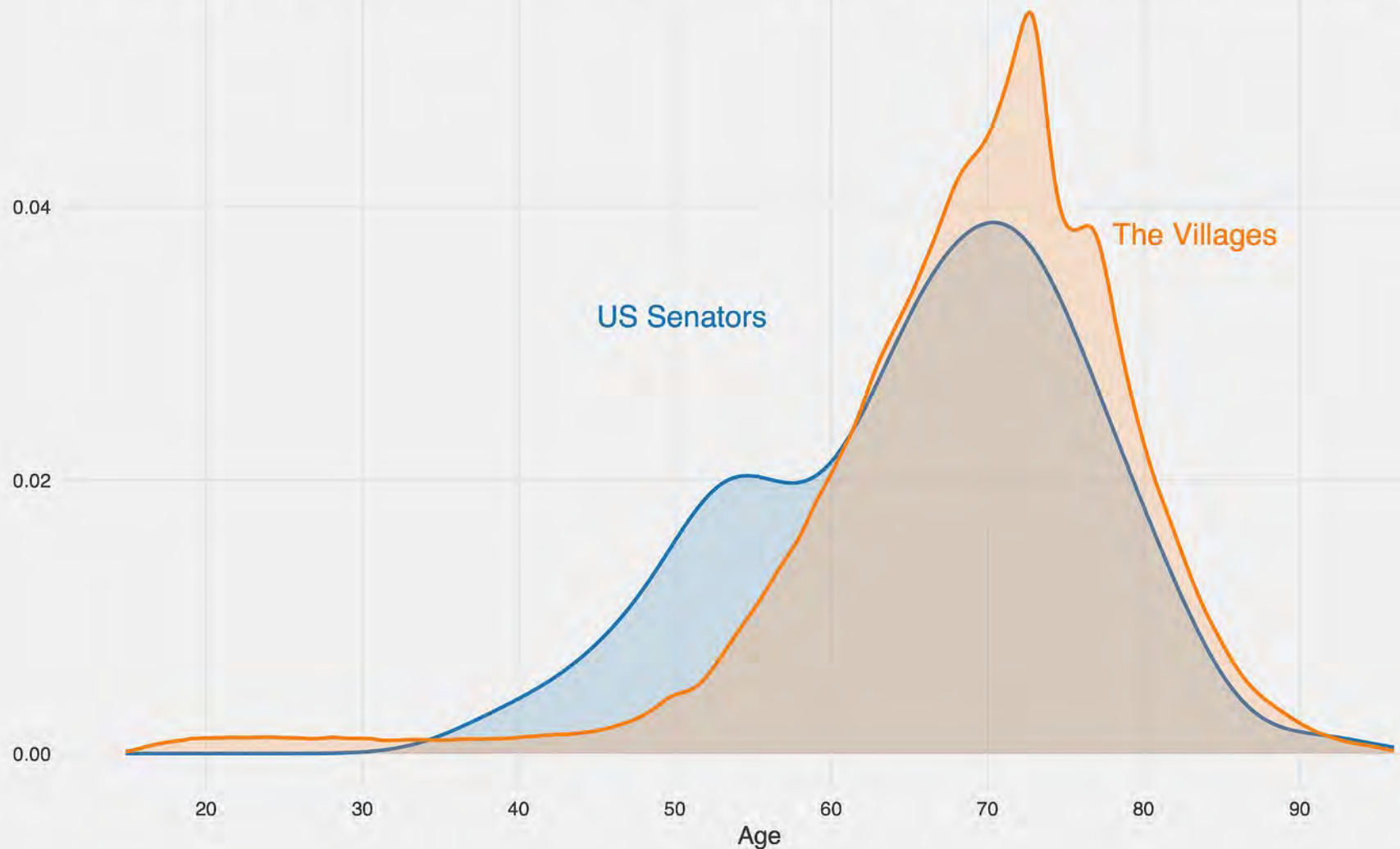
Age Distribution of Democratic Senators vs. Registered Democrats



Note: Age data for senators is from congressional biographies. Age data of registered Democrats is from the L2 voter file. Using survey data from the CCES generates a similar age distribution for Democratic voters, also placing the median at 50.

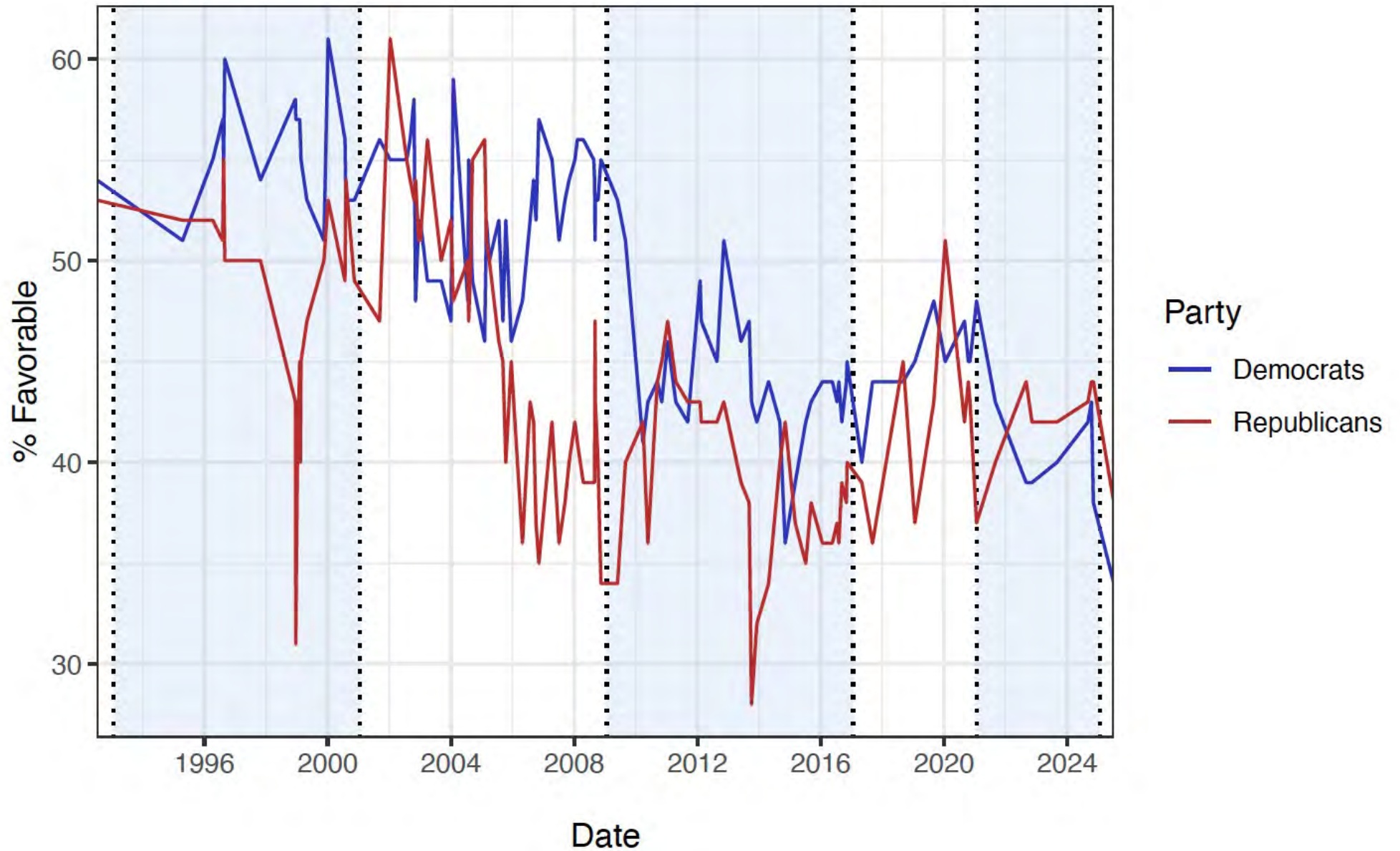
Who's Older: US Senators or Residents of The Villages?

The Senate's Age Distribution is Strikingly Similar to the Nation's Largest Retirement Community

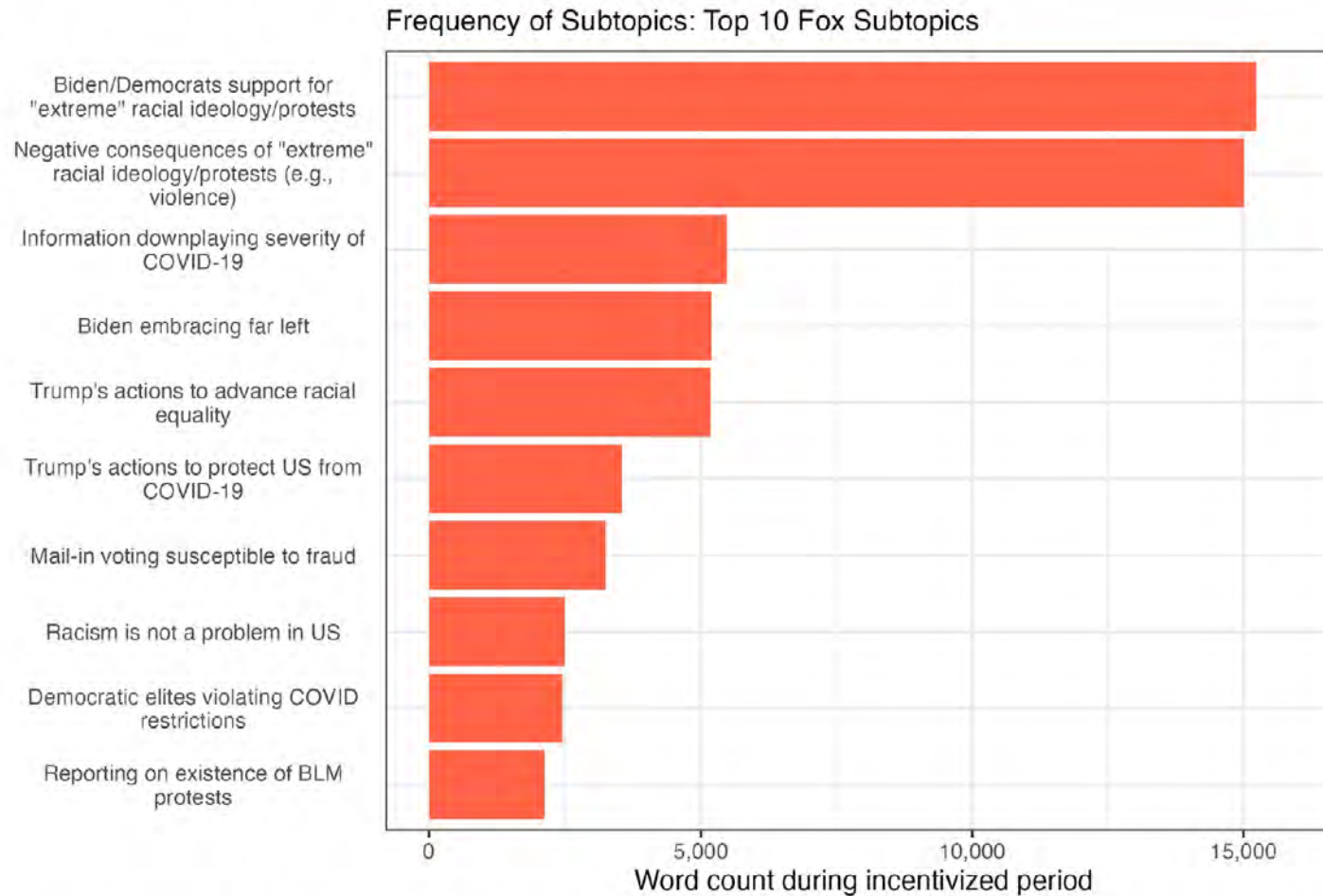


Party Favorability, 1992–2025

Data from Gallup Poll Social Series

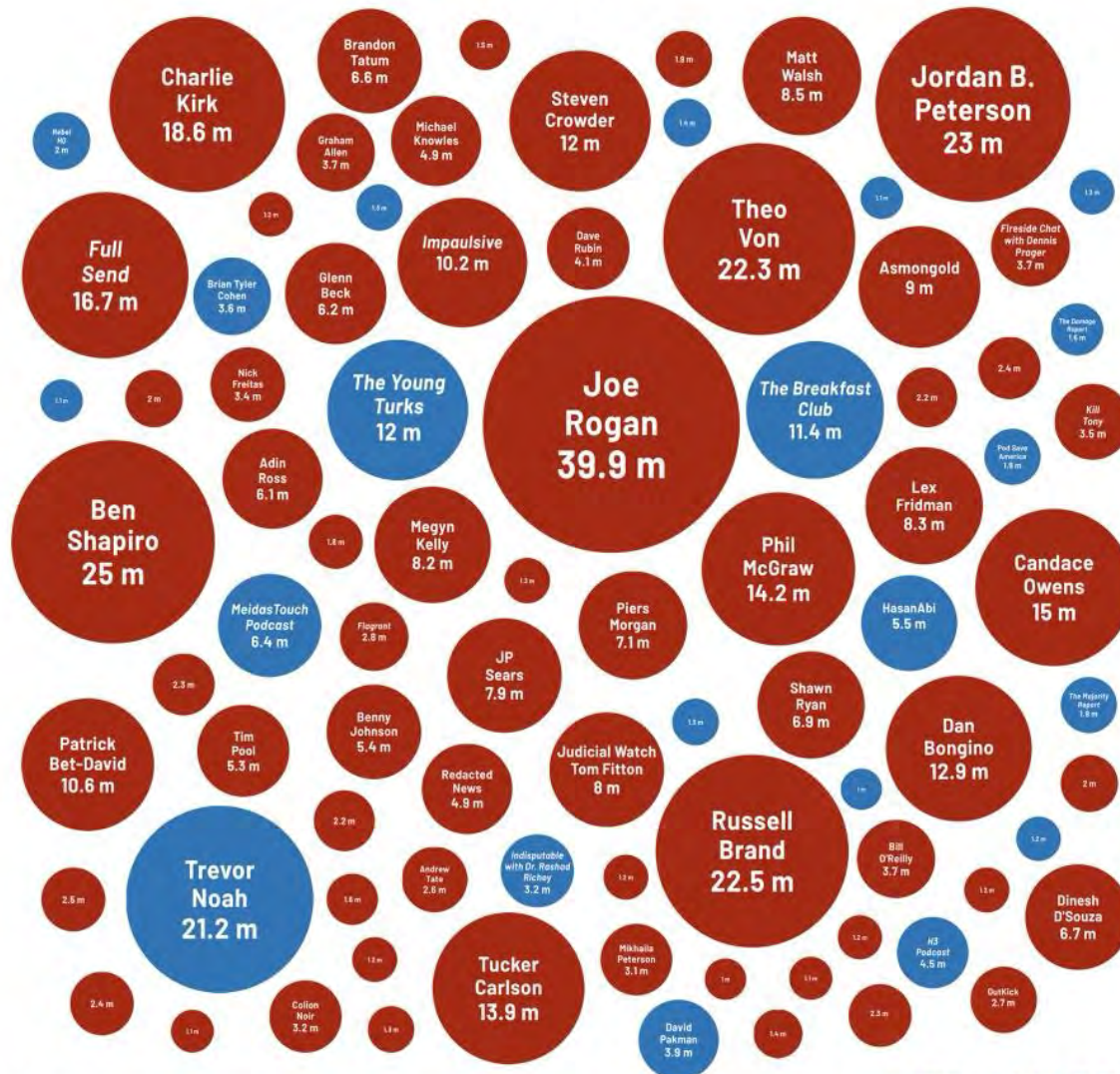


Top ten topics on Fox News, September 2020.



Note: This figure shows the top ten subtopics on *Fox News* from August 31 to September 25, 2020, measured by the number of subtopic-related words in transcripts of weekday prime time shows. It illustrates that *Fox* focused on racial issues/protests and the alleged support of elite Democrats for protesters' tactics/demands, as well as on downplaying the severity of the COVID-19 pandemic while playing up President Trump's response to it. Reproduced from Broockman and Kalla [forthcoming](#).

Total following of top right-leaning and left-leaning online shows



“Across platforms — YouTube, Rumble, Twitch, Kick, Spotify, Facebook, Instagram, and TikTok — right-leaning online shows accounted for roughly 82% of the total following of the online shows we assessed.”

“Right-leaning online shows had at least 480.6 million total followers and subscribers — nearly five times as many as left-leaning.”

From a study of 320 online shows with a right-leaning or left-leaning ideological bent. Each circle represents a show with a total following more than 1 million, with circle size proportional to total following as determined with subscriber and follower data collected on February 3, 2025, from YouTube, Spotify, Rumble, Twitch, Kick, Facebook, Instagram, and TikTok.

MEDIAMATTERS
FOR AMERICA

III

(How) Can the
Crises be Overcome?

Potential Sources of Resilience

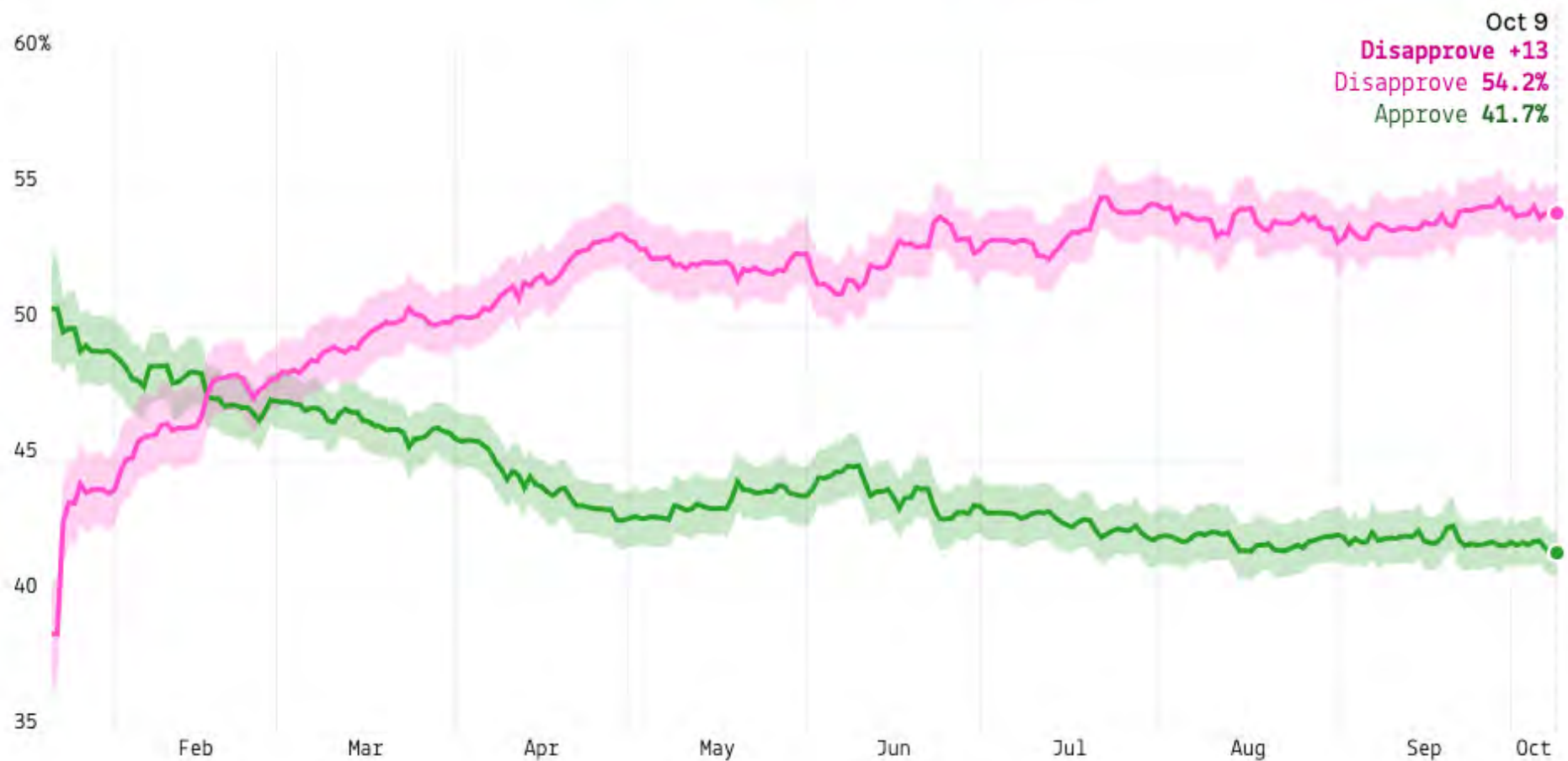
- Trump Isn't Popular, and Pendulums are Real
 - Much of what he wants to do also won't be popular
- Still Lots of Resistance Built In
 - Tiny House Majority
 - Highly Legalized Governance Structures (delay, blocking is often possible through litigation)
 - Decentralization of authority structures remains (e.g. federalism). It is a big and diverse country.
 - Constitution Very Hard to Change
- Clock is Ticking: Is There Trumpism After Trump?

Donald Trump Approval

OCT 9, 2025

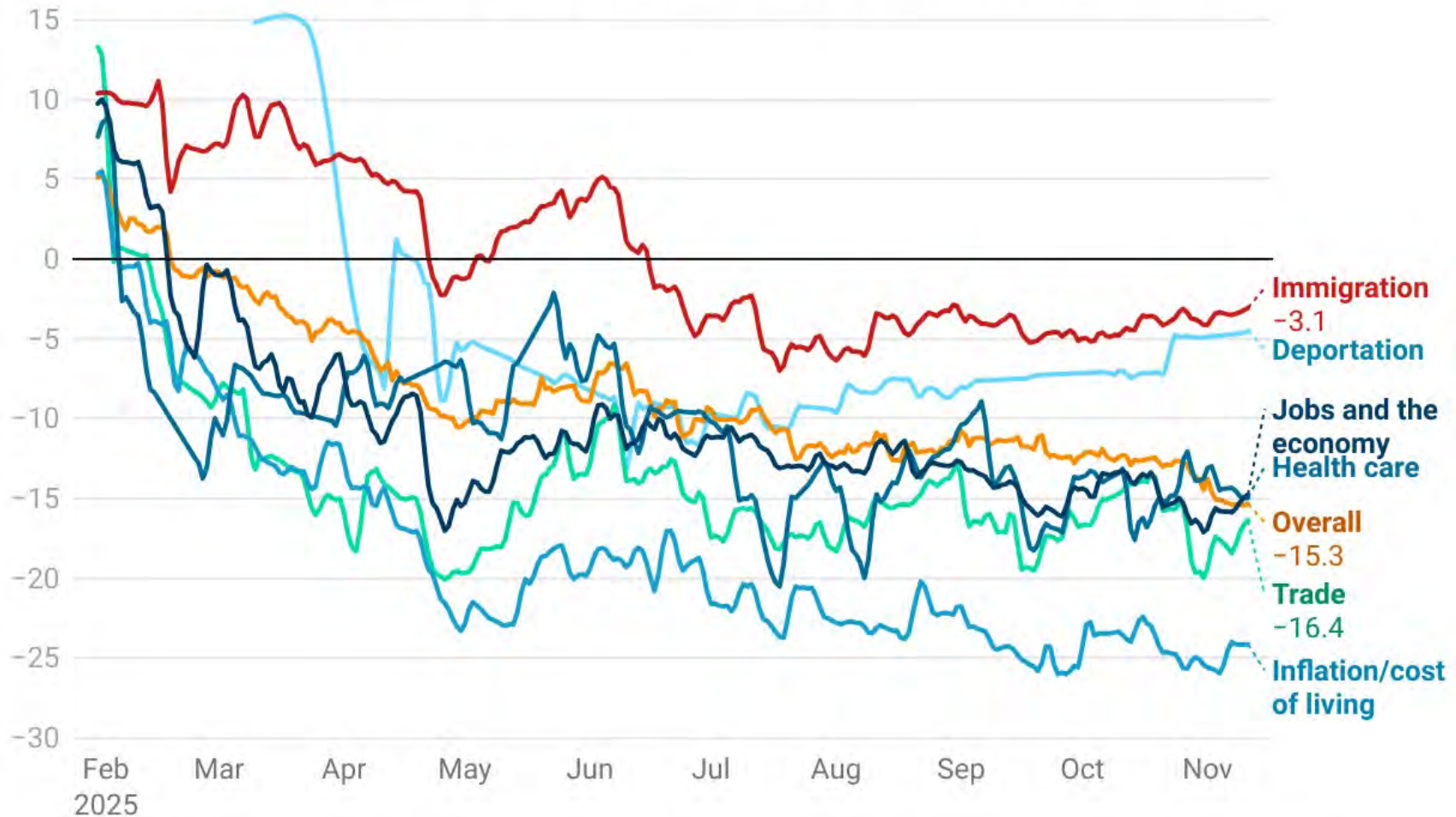
Disapprove +13

Approve 41.7% Disapprove 54.2%



Trump underwater on all key issues

Average job approval rating for Donald Trump overall and on issue-specific poll questions. For issues, averages are a mix of a 14-day moving average and modeled estimates.*



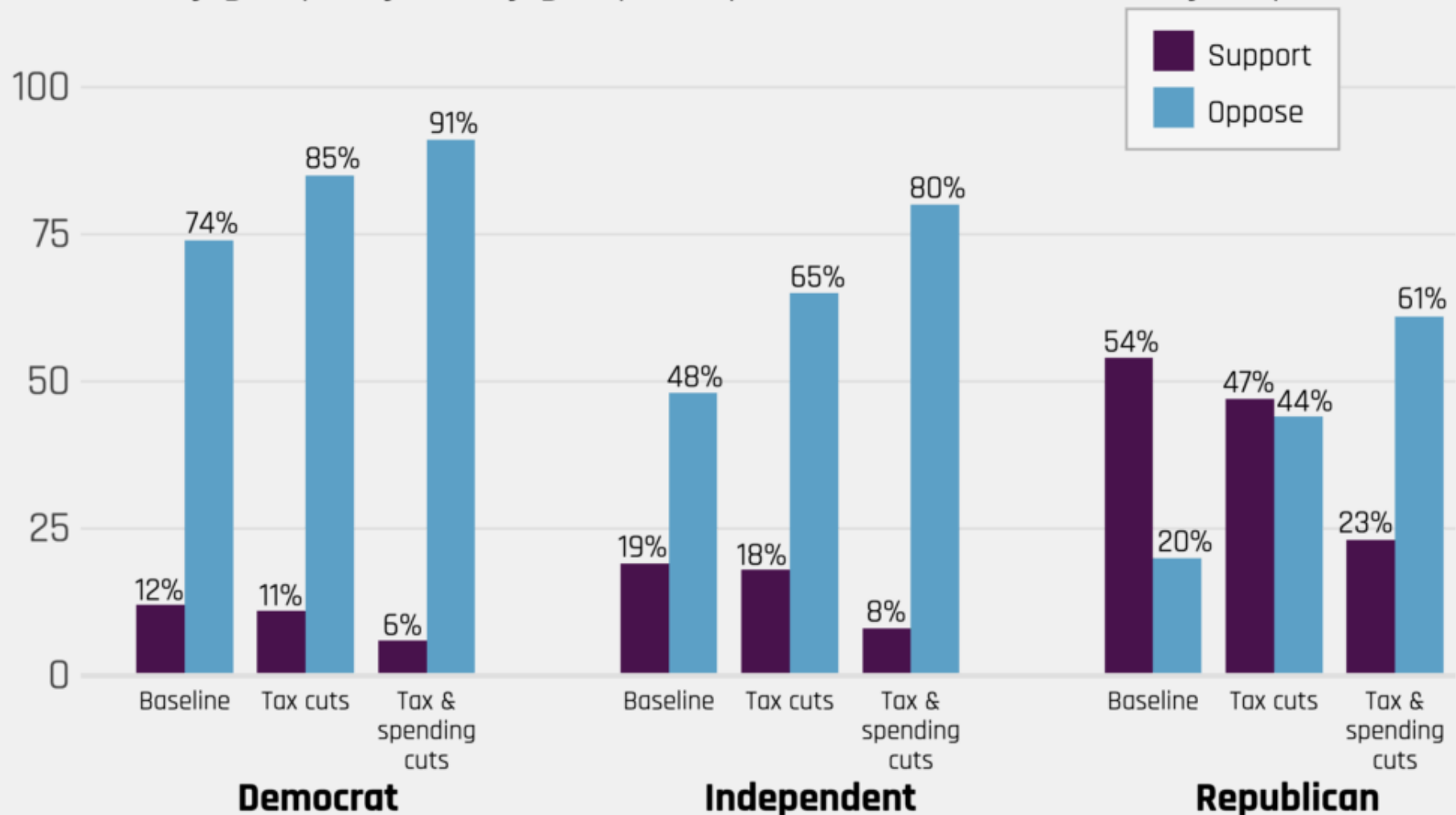
Averages computed by G. Elliott Morris. Approval data from Mary Radcliffe. Based on earlier data from Zenith Research.

*Modeled estimates are a blend of the implied issue-specific average given Trump's overall rating on each day, and a polynomial trend line estimating opinion over time.

Source: gelliottmorris.com • Created with Datawrapper

Even Republicans strongly oppose their party's budget bill as they learn more about its regressive elements

Support for and opposition to the House-passed One Big Beautiful Bill Act among three survey groups, by survey group and political affiliation of survey respondent



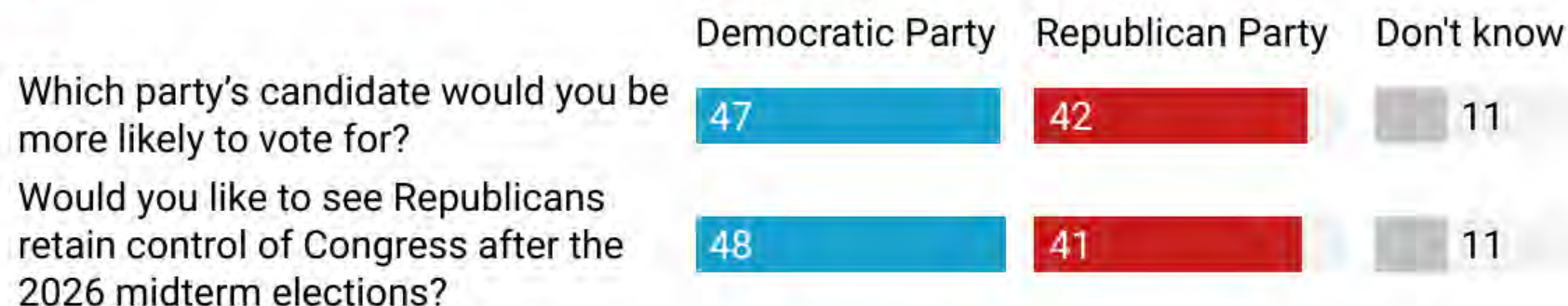
Source: Survey conducted by the authors with 4,500 U.S. participants.

Note: Those who answered "neither support nor oppose" are excluded from the figure. The Baseline Group includes respondents who were asked directly for their opinions on the bill. The Tax Cuts Group received information that the top 1 percent of earners would see their incomes increase by 4 percent, on average, while those in the bottom quintile would only see their incomes increase by 0.5 percent, on average. The Tax &

Democrats slightly widen margin in House vote when respondents are told who currently controls Congress

Responses to two questions about the 2026 general election for Congress, by question wording and party. Percent of adults responding

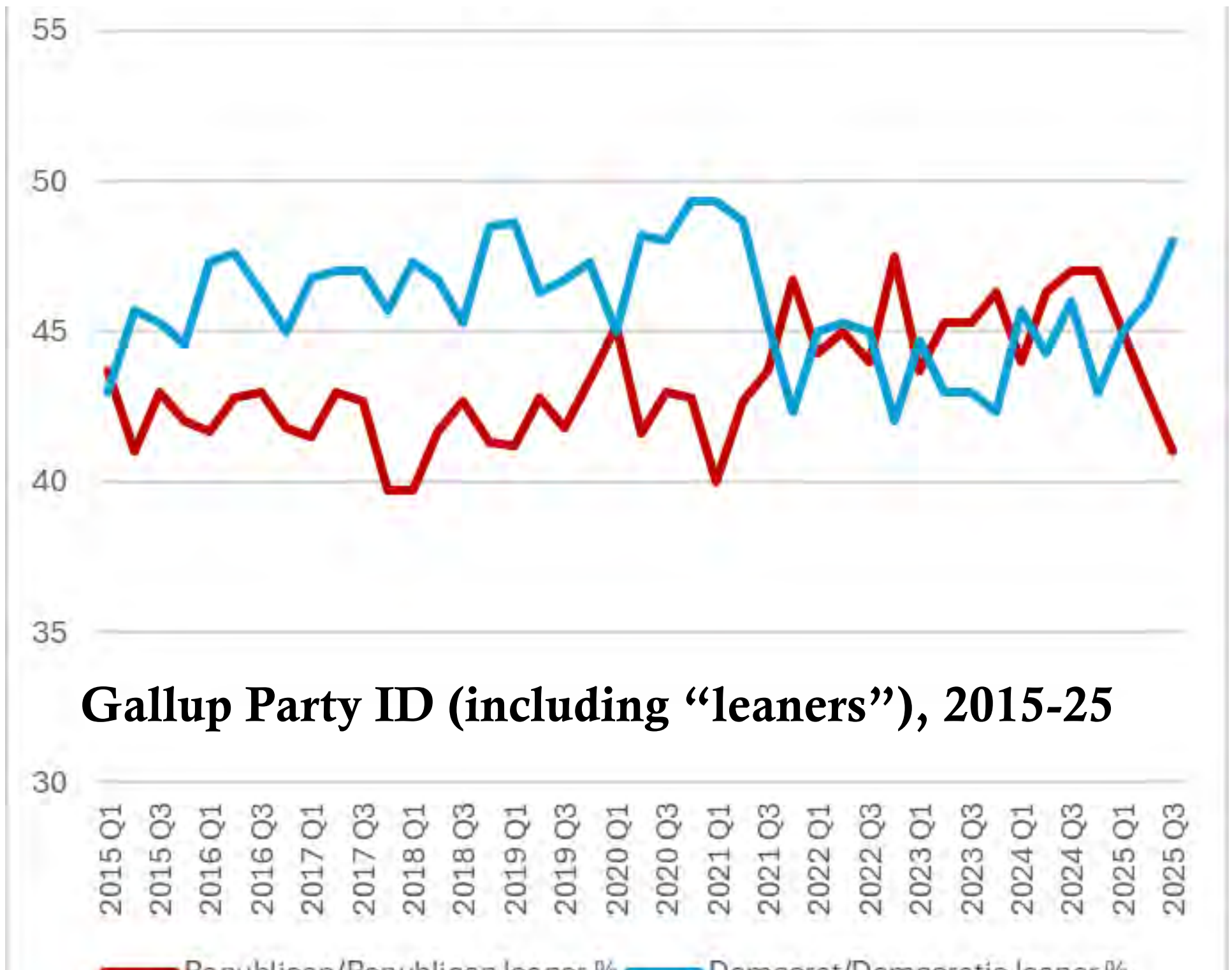
■ Democratic Party ■ Republican Party ■ Don't know



Data: Strength In Numbers/Verasight poll of 2,038 U.S. adults conducted Nov. 12-14, 2025

Source: Strength In Numbers/gelliottmorris.com



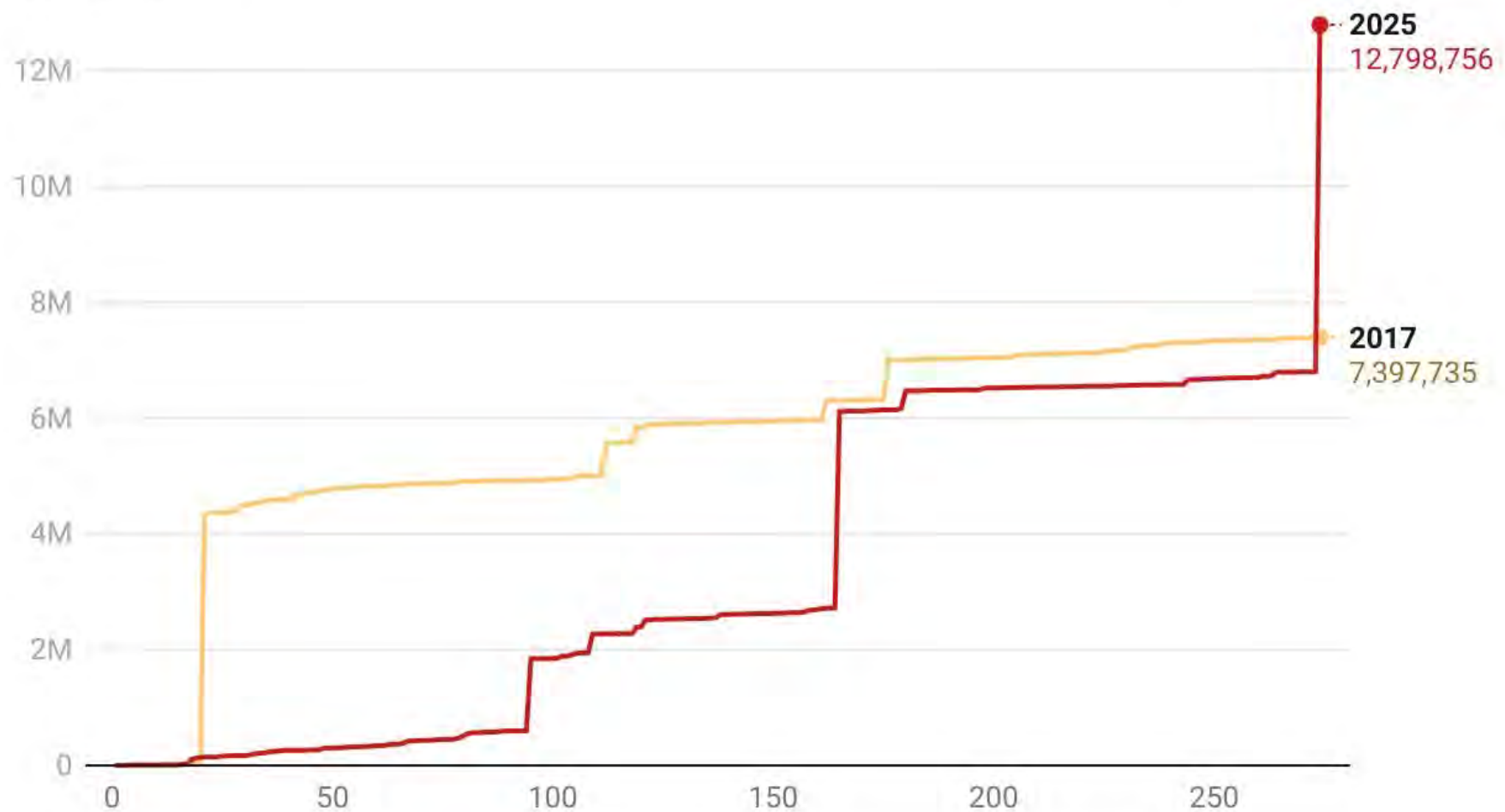


2025 Off-Year Elections



Many more political protests in 2025 than 2017

Cumulative number of people attending political protests, rallies, and demonstrations by day of presidential term, Trump 1 (2017) and Trump 2 (2025), according to the Crowd Counting Consortium.



Data for October 18, 2025 unofficial and added by author.

Source: Strength In Numbers/gelliottmorris.com • Created with Datawrapper

But...

- Pace of Backsliding is Alarming
- Continuing packing of key institutions with loyalists (termites in the basement)
- Does Trump *need* to be popular? (Again, power without popularity)
 - Minoritarian institutions (Senate, powerful Supreme Court)
 - Tightening grip on law enforcement/military
 - Support of Oligarchs/Attention Merchants

Democrats' Response Crucial

- Strictest two-party system in the world—Democrats *are* the opposition party
 - Elections and the opposition crucial in other backsliding cases (“U-Turns”; “democratic recoveries”)
- Whether opportunities arise is mostly structurally determined, but Democrats can *contribute* to their emergence
- Most important, Party must be ready.

The Democrats' Dilemma

Democrats need to build a “big tent,” encompassing moderate (and even disenchanted center-right) & progressive voters and groups.

But they also need to do really big things.

Huge tensions between these two goals, as well as among the big things they need to do (especially political reform vs. “delivering the goods”).

Why It's a Dilemma

- Winning power is necessary but not sufficient condition for rescuing, much less reconstructing, American democracy
- Democracy reform comes first
 - Filibuster, Supreme Court, statehood for DC/Puerto Rico, electoral reform (esp. gerrymandering), updating statutes to clarify purposes/prevent executive aggrandizement
- But also have to address voter backlash
 - How much does policy matter here?
- Huge challenge of dealing with oligarchy (“Lina Kahn problem”)
- All these things are going to reduce the size of the tent



Potential "silver lining": Shifting divide within party from progressive vs. moderate to bold vs. timid could make Democrats less seen as party of status quo

The New York Times