

Notes on the Exit Poll Disparities in 2020 Democratic Primaries

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I have been asked to offer my interpretation of the data that have emerged from the exit poll/votecount comparisons in the 2020 Democratic primaries. I have taken the position that the pattern of disparities is less clearly indicative of fraud than many have asserted. More specifically, Ted Soares, aka TDMS Research, and I have been at odds over the implications and probative value of the Super Tuesday, Big Tuesday, and South Carolina disparities. Yes, they are large and pretty much unidirectional (not unlike 2016), but, as Brad Friedman of Bradblog often has pointed out, exit polling ultimately comes down to turnout guesswork, a rather closely-guarded, secret's-in-the-sauce reality that only a very few recognize: the samples are small; they have trouble getting anything like a true random sample; so they oversample some groups, undersample others, and rely heavily on weighting; and for that they have to program in their best guess of the electorate's demographics; i.e., who turned out.

It is highly informed guesswork but it gets a lot tougher in primaries, where they can't rely on historical patterns of turnout by party-ID, which is the most reliable weighting. And it is especially difficult when there is high volatility - and the volatility couldn't have gotten much higher than in the weeks in question here, with candidates dropping out and making endorsements, [not to mention the coronavirus and market crash]. The tracking polls were all over the lot and voter preferences highly fluid. To make it still harder, there are increasingly multiple modes of voting (early, mail-in, at-poll) to deal with (and, with major changes in race dynamics, the early and at-poll voters can wind up looking like two separate electorates). This all adds up to an exit pollster's nightmare.

Sometimes I find it helps to stop looking for poisonous mushrooms and just close my eyes and listen to the sounds of the forest. What I heard here that causes me to be particularly skeptical about these disparities as indicators of fraud is this: rarely if ever have voters been more spooked and anxious. The coronavirus and its multiple threats (to daily life, investments, business, and life itself) had just begun stalking like a hungry lion in the bush. Democratic voters are also, of course, terrified of Trump: another four years of President Pustule presents a genuine existential crisis.

In such situations, people run for cover, for what they know. Think of it as a kind of Maslow's Triangle: we'll worry about a rip-roaring progressive agenda after we figure out how to survive and where we're going to sleep tonight. Bernie had an opportunity - a short window - to recognize that national (at least Democratic-national) mood and speak to it words of inclusion and comfort. It's not in his DNA - he just kept talking about the whole thing being rigged against him and all the things he was going to change. Not at all reassuring to voters scurrying this way and that like an anthill stirred with a hot poker. So, to me, the mass movement to Biden doesn't look like some hastily contrived (a week before, he couldn't even raise money and the DNC itself had all but written him off) nefarious rigging plot, but much more like a plausible and organic systemic response on the part of a very labile electorate spooked out of its wits.

Remember, too, that Biden started out far ahead. He lost that support and status via a string of disastrous debate performances. Before SC voted, Biden gave his first strong debate performance. I suspect it reassured a lot of

voters he had lost - they didn't just "discover" him, they returned - and of course the drop-out/endorsement of Amy/Pete amplified that.

Yes, it was facilitated by the usual top-down circling of wagons; and by Pete and Amy timing the market and cashing out for maximum value. That's politics - not election rigging. I think Bernie himself recognizes this, at least judging by his public statements. Yes, too, it leaves a tantalizing data set of red-flaggy looking disparities. But, again for me, the difficulty of turnout guesswork in volatile primary elections is a key factor.

Then there are some clues: one of the biggest absolute (i.e., not MOE-relative) disparities occurred in Vermont. Its impact was to turn a 40% Sanders win into a 30% Sanders win. BFD. Biden was already [according to the EPs] over the 15% threshold so the impact on delegate count was negligible, at most a net of 2 delegates. That's not the kind of prize riggers are likely to rig for. And much the same can be said about South Carolina: rigged (i.e., if we credit the EPs) or not rigged, by either measure of voter intent, SC was a Biden blowout, with essentially the same impact on race dynamics. Again, BFD. You really have to stretch logic to come up with a motive for the VT "rig" - and if that 10.9% disparity is chimerical, what does it tell us about all the other (smaller) numbers in that column?

I'm hardly happy here channeling Mark Lindeman or The Mystery Pollster Mark Blumenthal - I've spent the last 20 years crossing swords with such denialists. But I am trying to take as objective a view as possible - it's especially important with the temperature at or near the boiling point that false fat not be flung on the fire. We'll need all the credibility we can get—and all the data they will allow us—when the fertilizer really hits the fan in November and when exit polls are more reliable and we have other baselines. We have to be very, very careful about crying wolf when it can so easily be shot down and chalked up as more lunatic-fringe nonsense.

Yes, I'd like to see investigation of DBIs, servers, cards, ballots, whatever. But that's a very different argument: basically that unobservable vote counts are no better credibility-wise than exit polls, indeed worse. I don't think the best way to get that investigation to happen is by trotting out disparities—whether all together or one at a time, as Ted has deliberately done for maximum impact—that aren't solid enough to do much beside inflame the already rabid. The reality of our kind of forensics is that we carry a tremendously high burden of proof - unless we can meet it, and especially in the current environment, drawing more such overheated attention to our weakest work can in fact be counterproductive.

The bottom-line message here is let's keep our shirts on. As impressive and damning as those numbers may look, they are rooted in Edison turnout guesswork. It's a very different evidentiary kettle of fish from, say, E2016, when we had the accurate national exit poll to serve as a comparative baseline for the swing states. We have nothing like that here and screaming fraud from the rooftops without even this critical caveat, is, I believe, irresponsible. I appreciate the work Ted has done to capture the screenshots and generate an analysis that clearly shows a suspect pattern. I don't subscribe to a willful failure to consider the larger context, the methodological challenges potentially bedeviling the baseline, or any possible causalities other than fraud.

I've spent my EI career on the other side of this fence—but, with only a couple of regrettable exceptions, took great care not to overstate any cases. The process is designed for concealment - that is the fundamental problem! - and our evidence at best indirect and subject to diverse interpretation. Sometimes we have really helpful secondary baselines (like the accurate national EP in 2016, or the demographic crosstabs of the EP in 2006) that let us put more weight on the numerical pattern. I may very well be wrong here, Ted right, a great fraud in the works.

Either way, it needs to be investigated with direct evidence. That is what we've always sought and almost never found.

NB that this is all pretty moot at this point. I see our Job One going forward to stop what I see as a likely if not inevitable push (by McConnell/GOP) for online voting (only once they've got something in the works that they know they can control). I think that is why (among the more obvious reasons) McConnell is blocking federal VBM legislation. I've always known how to think like a bastard, and my batting average has been fairly good. Time will tell.