Democracy and Decision 2024 | Episode 5: Post-Election Analysis

Stephanie Perry: Hello, and welcome to Omnia, the podcast on all things Penn Arts & Sciences. This season we're taking a close look at the state of U.S. democracy in the context of the 2024 election. I'm your host, Stephanie Perry, exhauster exit pollster, Executive Director of the Penn Program on Opinion Research and Election Studies and a member of the NBC News Decision Desk Team.

In today's episode, I'll talk with John Lapinski, Director of Elections at NBC News, about the results of the 2024 election and get some insights into our experience calling the race at the Decision Desk. We'll also discuss how the polls measured up to the election night results and what our exit polling revealed about voter's motivations in this year's election.

In addition to his role at NBC News, John is the Robert A. Fox Leadership Professor of Political Science and Faculty Director of the Robert A. Fox Leadership Program and the Director of the Penn Program on Opinion Research and Election Studies. He also serves as the Faculty Director for the Fels Institute of Government.

Welcome to Democracy and Decision 2024, episode 5: Post-Election Analysis

Stephanie Perry: So, John, the results are in, and we have a clear winner. Donald Trump has won the presidency again and will become the 47th President of the United States. Republicans have regained control of the Senate, and as of now it looks like they'll potentially keep control of the house as well. From our vantage point of the race at the Decision Desk, can you talk about what it looked like early on? When did you know that Donald Trump and the Republicans might have a big night?

John Lapinski: Yes. So we actually knew pretty early on. I mean, going into the night, no one really knew where this race was. A lot of people thought it was a tide race or maybe it was going to either tilt Trump or tilt Harris. And so again, before election night, no one knew. But we knew very quickly actually where this race was going. And part of the reason why we knew so quickly was because we have such a good team, and the team includes a lot of Penn professors, Penn staff, and more importantly a lot of students that we've trained in our programs like PORES and Fox. And so I would say by nine o'clock at night... I mean before that we knew it was moving in Trump's direction, but by nine o'clock at night, we had a pretty clear sense that he was going to win the presidency, that the Republicans were going to also probably take control of the Senate and that the house was tilting Republican.

And so, even though it took us a lot longer to actually put in check marks, because we can't put in check marks until we're absolutely certain, we knew where the night was going early on.

Stephanie Perry: So, going back to that 9:00, 10 o'clock hour, can you talk a little bit about what exactly you were seeing that made you sure that the Republicans would have a good night?

John Lapinski: So what we were seeing, we were collecting a lot of very granular data. So we had, again, the Porch team helping us collect precinct data in key places like Ohio. We were also collecting that in Florida. We were collecting that in Georgia, North Carolina, Pennsylvania. And so these are states that are obviously very critical. And so what we started to see at a granular level was that Harris was underperforming in key places. So she was underperforming in urban areas, and more importantly, she was underperforming in the suburbs. And so I think everybody going into the night realized that Harris had to win the suburbs and she was underperforming what Biden did in 2020. And we saw it in so many places and it seemed systematic. She was also underperforming in areas that had high numbers of Latinos. And so when we think through what she needed, what did she need? She needed to do well in the suburbs, she needed to do extremely well with suburban women. And she also needed to do pretty well with Latinos.

Everybody thought the Democrats were doing a little less well with Latinos, but what we were seeing was not a little less well, it was a lot less well.

Stephanie Perry: And the exit poll showed that too. Trump obviously made huge gains among Latinos and specifically Latino men, and we saw that early on as well. So let's talk about a little bit of the pre-election polling. You mentioned this at the top, but all of the polls were basically within the margin of error for a close race. Can you talk about what the polls got right and maybe what they weren't able to capture this year that could have helped indicate Trump's success?

John Lapinski: Yes, and so, one of the things that we noticed, I actually wrote an article with a colleague of mine, Josh Clinton. And what we showed in that article is actually an article that did extremely well on NBC News. And we showed that pollsters were seemingly putting a heavy hand on how they were weighting their data. And so basically with polls, you have the data itself and then you have decisions that pollsters make and how to weight the data, and that determines the results. And a lot of the pollsters thought it was going to be a close race, so they were putting a heavy hand on these polls and pushing them to a tie. And so I think that was not really what we were seeing in the data, but that was what pollsters were thinking. And so I think what the pollsters got wrong is they showed it artificially close. We thought, and in our article we showed that from a statistical perspective, it's most likely that the race was going to break one way or the other. And it did, and it broke in Trump's direction.

Now that said, polling while there were some misses, and there were particularly some misses in specific polls, but it got some things right. And for example, most polls, especially polls that had over samples of Latinos showed that the Democrats were doing poor with Latinos, and that proved out to be true. I don't know that the polls... So they showed it, they got it right

directionally, the magnitude I don't think they necessarily got right. But again, directionally they showed that. The one thing that people don't understand about polls, I think it's commonly misunderstood, is polls can give us spreads and margins on how groups will vote, but they don't tell us, it's a much trickier thing to actually figure out who's going to vote. And so polls really can't tell us anything about turnout.

And that's another thing that we saw. It wasn't just the margins that we saw what made Trump win, it was differential turnout. So basically Trump performed well in areas that were pro-Trump, the turnout was higher. So it's not just the margin, it's the margin plus more people voting. And when you combine those together, it led to Trump doing exceedingly well.

Stephanie Perry: So can you talk a little bit more about turnout. So far, it looks like neither Harris or Trump reached the levels we saw in 2020 during Covid. So, can you talk through maybe where that vote came from this year and how you think that could have affected the result?

John Lapinski: Yeah, I think that a lot of people going in people initially, early on in the summer, I think that when we looked at the polling data, even though I said polling doesn't predict turnout, I mean it does, oftentimes we look at enthusiasm amongst the electorate to figure out whether or not that's going to map into turnout. And during the summer, enthusiasm looked really low, so I think a lot of people thought it was going to be low turnout. When Biden stepped aside and Harris actually took his place, there seemed to be a lot more enthusiasm on the Democratic side. So I think going into the night, everybody's best guess, and this was amongst a lot of different people, is they thought that turnout might be a little shy of 2020, but that it was going to be potentially close. And we saw early voting looked strong.

I mean, obviously we did a lot of work at NBC and through PORES on tracking the early voting, but then when election night came up, the thing, we know how many people vote early because we're able to track that through our analysis of state voter files. And these voter files tell us who voted early. And so that turned out looked pretty robust. But what we saw was, again, not as much election day vote as we had expected. And a lot of Democrats thought that their electorate, which voted very heavily by mail and early in 2020, mainly by mail because of obviously the pandemic, they thought that their election day turnout was going to be more robust, and that turned out not to be true.

Stephanie Perry: So as of this recording, NBC News has not projected control of the house. Can you talk about what's outstanding there and when you expect to be able to call control of the house?

John Lapinski: Yes. So, one of the things, house races take a long time, and the reason why it takes a long time is there's states, especially states out west like California, that literally take weeks to count all of the vote, and there's a lot of competitive seats in the house. And so, right now we have a couple dozen seats that we still

have not called. It is definitely looking like the Republicans will take control. This is Friday. But my guess is that we won't know until early next week. It could maybe go even a little bit further into the week. And there is an outside chance. I don't think it's a very good chance, but the Democrats have a little bit of opportunity still. So, if they win all of the remaining toss-up races and they go together, there's a possibility that the Democrats could win 218 seats. I think it's unlikely, but still possible.

Stephanie Perry: So, one of the big stories that came out a week before election was Ann Selzer's Iowa Poll, which showed Harris up in Iowa by three points. Selzer is a respected independent pollster who's been very accurate in the past presidential elections, predicting the winner in Iowa. She predicted Trump with a seven point lead in '16, and he won that state by nearly nine points. So this year it looks like Trump will win Iowa by 13 points. So what do you think may have happened there?

John Lapinski: Well, I've always been a little skeptical of Selzer's polls. I know that she's always been considered to be the guru of Iowa, but she actually is very nontraditional in how she weights her polls. And so, one of the things that most pollsters learned in 2016 that you need to weight by education, she does not do that. And so, one of the reasons why I think she's been okay in the past is that Iowa is not a particularly diverse state. And so some of the things that we know we need to do in our polls, that she hasn't done, and it's turned out okay. But again, in polling things can be fine and then all of a sudden you can be thrown a real curveball. So I think it was a combination of how she approached methodologically her poll, and also she made some strong assumptions herself about what the electorate would look like.

And so this is another thing that pollsters, pollsters have lots of decisions they have to make, and she made some pretty consequential decisions on what the electorate would be, and she got it wrong. And when you get it wrong... She got it wrong. I mean, to her credit I would say is that a lot of pollsters that I'd said earlier, they just weight to ties or weight to closer election. She didn't do that. So I thought it was pretty gutsy of her to actually go with... She didn't change her methodology, she stuck with it. She was honest and transparent, but she was badly wrong.

Stephanie Perry: Yeah, that's what I was thinking. It was very risky to go out that way and not follow in with the herding of the other pollsters and just get in line with a tied result. And she did show some trends that we saw at least early on in the night, like white non-college women in some of the battleground states.

So, can you talk a little bit more about the art and science of polling? Obviously, polls are not meant to be predictive of the outcome, but can you talk about some of the pollster decisions and just thought processes that go into how they conduct a poll, weigh the poll, analyze a poll, and then what they put out for the American public?

John Lapinski: Yeah, I can talk a little bit about that. So, I think one of the things in the polling industry, I've been doing polling now for a while, and so at least a couple of decades, and things have changed in the business. And so, when I first started in my career, pollsters actually reported out a lot more information. So, they provided a lot of internal information on their poll. They give you things like response rates. That means how many people did they have to try to contact and how many actual people took their polls. They also would be very explicit in their methodologies of how they weight the data. And so again, pollsters are making decisions, and so they're weighting by demographic variables. Now, they've actually changed and usually they weight by some sort of partisanship variable, which means that they might weight by the percentage of Democrats and Republicans and independents, they think exist. And there's different ways to do that.

But I think that the thing that's a little bit problematic is that pollsters now, oftentimes when polls are put out, they don't provide you that information, so you can't know exactly what they're doing. You don't know what the response rates are. The response rates aren't good. We know now that response rates are really, really, really low. But also, when you don't know what pollsters are doing, then you don't know, again, it's a little bit of a black box. And so that makes it a little harder to actually figure out how to not only assess the polls, but also potentially fix them. Because again, if you don't have that information, you're guessing at what pollsters are doing. I think one of the big problems that pollsters face is that they really have strong incentives reputationally, and also even in some instances financially, because a lot of pollsters what they sell are polls, to not get it wrong.

And so those incentives can sometimes work against doing good polling, or at least it works against taking any sort of risks. So again, if pollsters see everybody else is having polls as being tied, maybe they're going to make a decision to weight their poll to be a tide. And we can't know what they're doing because they don't tell us. And then oftentimes, when we ask them to share that information, again, 20 years ago, everybody shared it. Now it's like people keep that in the lock box. And sometimes people will share it if they're pushed, but not easily. So, there are... Again, the business needs to change. There's no question about this. Now, basically... And the reason why it needs to be changed now, pollsters will say in this election that they didn't get it wrong that bad. So, you're going to have a lot of people basically saying, "Well, we weren't that far off," but they were all off and they were systematically off. And so, they got it wrong.

And so, there is, even though... They weren't that far off, because they were very risk averse, they forced it to a tie. And just with the nature of elections now, if you force it to a tie, even if you're really completely wrong in how you're doing it, it won't seem like you're that wrong. And so, it will be interesting to see in a lot of these postmortems, what pollsters have to say. I think I know what they're going to say. They're going to say, "We didn't get it really wrong." But the truth of the matter is they did get it wrong.

Stephanie Perry:	So, the exit poll team from NBC News published a story on Wednesday about the results, which talked about some interesting data points. But first I would just want to make the point too for our listeners, John has mentioned this a couple of times, but the PORES students on election night, we had over three dozen of them working with us on the exit poll desk with me. We had them working to get precinct data, as John mentioned earlier. And then we also had them collecting turnout information throughout the lead-up into the fall for election night. They were helping gather all that data, contact election officials, doing all the legwork.
	So, the exit poll results showed some interesting findings. One of them was that 45% of voters said they're worse off now than they were financially four years ago. And that number was the highest we've seen actually since 1992 when we started asking that question. And what struck, I think, a lot of people as we were looking at that was, it was even higher than in 2008, during the recession it was 43% then. We also talked to voters about what quality mattered most to them, and a large percentage said they wanted somebody who could bring about needed change, and Trump dominated among those Americans. One of the other things that we found was that the percent of voters who identified as Democrat this year was the lowest that we've seen this century, and the percent who identified as independent was the highest.
	Trump obviously made gains among Latinos as we talked about, and young people and independents. So with all that in mind, John, is there anything else, any other points about the exit poll that you want to make or anything that you think a big story that was told or that could be told in the week's, days afterwards?
John Lapinski:	Well, I think that you've hit on most of them. I think that our exit poll, one of the interesting things is the exit poll is a little bit unlike other polls and that we're actually talking to real voters. When you do a poll, you're calling up people and asking if they voted. You can actually in some instances, cross-verify that to see with people who've said they voted early. You can actually check the voter file and see if that's true. But again, I think the exit poll is particularly useful in getting that part of the electorate that is so critical, which is the election day voters. And that was really what helped us understand better. I think our exit poll did a particularly job in getting the Latino numbers right, and that's a huge story, and that's a story also.
	But I think one of the things, the lessons out of 2024 will be for Democrats, is that they're going to need to rethink some things. And so they're going to need to rethink about how they're approaching Latinos. As you had said, Steph, a lot of Democrats were going into the election thinking it was going to be all about democracy, but one thing we've known consistently across the exit poll is, usually the economy is the number one issue. And in '92, so you pointed that out, that was a big year where there was a lot of problems economically. That

was, I think, the year that James Carville had the "It's economy stupid," and it ushered in Bill Clinton. So I'm sure that we're going to see a lot of James Carville on TV basically echoing what he said in 1992, but in a way much more mournfully for Democrats.

Stephanie Perry: And the economy actually was the most important issue on our exit poll from 2008 every presidential election year until now. And we were surprised when we first saw the results come in and the most important issue was actually the state of democracy. Now, there are some differences there by gender and age and things like that. But what was really interesting about the way this night unfolded, was that so many voters still feel nationally on some of these big issues that Trump has been pushing: abortion and immigration, for instance. Those percentages of people who support legal abortion and then who support undocumented immigrants being offered a chance at legal status, those numbers stayed consistent nationally. Not only did they stay consistent nationally, but Trump voters actually were more inclined to say that yes, abortion should be legal and undocumented immigrants should be allowed to stay in this country. So I think it does also speak to the point of maybe just anger. There's a lot of pessimism. People were angry about the direction of the country, more so than it does about the issues quite frankly in this election.

Stephanie Perry: So, I think a lot of democratic strategists and pundits looked at the gains Democrats made into 2022 in the Wake of the Dobbs decision and took this as an indicator that Harris might do better than Trump based on the midterm results. So why do you think these gains in the midterms didn't translate into success for Democrats, especially at the top of the ticket?

John Lapinski: People hold the president extremely accountable, and people were still hurting. It's when you actually look on some of these issues, when you look at the economy, you had said it wasn't the number one issue, but it was very important for a lot of Republican voters. I think it was the number one voter-

Stephanie Perry: Certainly it was the number one issue among Trump voters.

John Lapinski: And some of those Trump voters were people who weren't Trump voters before. So I think that the lesson learned is that there are certain core things that are extremely consequential for people when they turn out in presidential terms. And what we've seen is, we've seen presidential elections that don't look like midterms. We saw 2020, one of the things, all the polls suggested that Biden was going to win, but they suggested he's going to win it more easily. And people were actually surprised that Trump picked up new voters. And so it's not looking at it retrospectively and seeing what we saw in 2020, seeing what we saw in 2016, it's not a huge surprise that Trump actually won. And I think actually what we'll see is, my guess actually is that we go forward, if we were to look into the crystal ball going forward, when we look at some of these elections, my guess is that Democrats will regroup and actually do again well in some of these off year elections.

We'll have to obviously wait and see. But next year when we look at Virginia, I mean everybody's going to look at that, but I think that this will help Democrats in some ways mobilize. But again, there's a big difference between presidential election years and off years. And also, by the way, not just in how the results actually turned out, but even with polling. When we actually look back at the track record of polling, polling performed pretty well in 2018 and 2022 and did very poorly in 2016, 2020, and 2024, so there's just different dynamics in presidential years.

Stephanie Perry: Let's talk a little bit more about that. So Trump excelled with low propensity voters again this year. And a lot of pollsters after 2016 changed their methodology in an effort to account for the voters who either weren't taking the poll or who otherwise were not likely to vote. So do you think that there are now other ways that pollsters can improve there? What do you think the industry should do going forward?

John Lapinski: Well, I think one of the things that the industry probably should do going forward is that they should be a little bit more transparent and a little bit more honest. And I think the reason, going back to that piece that I wrote, I tried to explain with my colleague Josh Clinton, of the decisions that pollsters are actually making. When I say being more honest, what people have to be honest about is that you make basically decisions or assumptions on how you weight your poll. They're hugely consequential. The decisions can move polls by as much as eight points on the top line. That's a huge amount of difference. You're basically in some ways telling, you're picking who's going to be ahead. And so, as you know Steph, my preference is that you actually lay your cards out on the table, and I would actually weight for polls multiple ways. I would actually show different electorates and basically say, "If these assumptions are true, then this is what will happen." Instead of trying to point to one number. Because the one number you can never know will be right.

And if pollsters all are risk averse and they all decide that they want a herd on one number, they may herd on a number that almost certainly will be wrong. Because what you don't want to be too wrong, you might have incentives that you don't want to be too wrong, so maybe you push a race to be closer than it is. Again, I actually think the polling industry is at a tipping point, and I think that there will be big changes for lots of different reasons. Hopefully PORES will be at the center of that, not just the professors and staff that work at PORES, but will involve our students. One of the things that is so important to me, and it's one of the things that has made the Decision Desk at NBC so good, is that we, again, can bring in the students, give them an amazing experiential learning opportunity. Oftentimes they tell us when they graduate, it's their best moment at Penn. And it helps them because they learn so much, and it really helps us because they're big contributors, because we teach them in the classroom and we basically show them how they can take what we've taught them and apply it in the real world. And there's nothing more real than work on the Decision Desk.

Stephanie Perry:	As the director of PORES and a political science professor who teaches polling and data science, what are some areas of this work that you see as important for our PORES students to understand?
John Lapinski:	Well, I think that just what I had said is important, is you oftentimes teach students things in the classroom, but they don't know how to apply it. And so I think one of the things that we're doing very well in PORES and with our minor, we have a survey research and data analytics minor, there's also a data science and analytics minor that I'm director of. And I think that the thing that is very important is, you need to teach students technical skills and you need to give them the ability to do analysis, but you need to take it one step further. You actually then need to show them how to actually apply the tools that they've learned, because it's not intuitive always like to actually figure out, "Okay, you've learned something in the classroom, but how would you apply it in the real world?" And even though we're doing it, obviously, in the context of elections with a lot of our work, we really try to show students how to generalize those skills and teach them how to think about problems and issues.

And so when we do that, I think we equip our students to go off into the world regardless of what they end up doing and be successful. |
| Stephanie Perry: | These kind of experiential learning opportunities, especially this one on election night, also offer students the ability to know what it's like to work intensely under pressure. And I think that that is something that a student cannot otherwise get unless they're really working in the real world environment and in that moment. So now on the reverse side, what challenges do you think students face and how are you encouraged by their experience in the program and at the Decision Desk overall? |
| John Lapinski: | Well, students face lots of challenges. I think that one challenge that we've seen is that students had, depending upon where they were in their academic career, they had an uneven experience during the pandemic. I think that Covid sets students back. I think that they were isolated oftentimes learning online and they were not working in groups. And one of the things that we do at PORES is we teach students that you've got to be a part of a team. And so there's all the hard issues need to be solved and that we're working on, really no one individual can solve them. And so I think a challenge for students is figuring out, again, how do you work in a team? How do you work collectively? How do you work collectively efficiently? And so I had said when we teach them a lot of things in the classroom, but one of the things that we teach them in the experiential experiences, not just to figure out how to think, but how do you actually interact well within a team, because they're going to be doing that for the rest of their lives.

And so we want to help give them some of the abilities to do that well so that they can, again, take that outside of Penn and apply it in the real world wherever they land. |

Stephanie Perry:	So, election night is over, the Decision Desk is obviously still working through the house races and the other calls that are outstanding and some of the battleground states and things like that. What happens next for the Decision Desk for the Penn students? After this settles, what is the next step for you? What's the goal and hope following this election?
John Lapinski:	Well, as you had said, we're not finished, so the students are still helping us. We're still trying to wrap this up. The reason why this is not a video cast is because no one wants to see me right now what I look like-
Stephanie Perry:	Or me.
John Lapinski:	... after working as many hours as we've actually worked. And so I definitely don't want anybody to see me. You can see me maybe in a month and I'll be fine again. But what I see, I think we had, in all seriousness, we had an extremely successful experience. We have scaled up the number of students that are working on the Decision Desk. We actually worked very hard to try to create opportunities because there's so much demand amongst our students. I am working with the dean of the college, Peter Struck, who I think is going... He's a new dean, but I think he is an excellent dean. And one of his hallmarks is going to be that he wants to create more experiential learning opportunities for our college undergraduates. And so we're very aligned with what's going on in the college. And what I see is us creating more opportunities. And I think that really fits in with the mission and vision of what's coming out of college hall.
Stephanie Perry:	Great. Well, thank you so much, John, for sitting down with me today.
John Lapinski:	Well, thank you, Steph. It was really a pleasure and a treat.
Stephanie Perry:	That's it for episode 5 and our post-election analysis: For our final episode I'll talk with Rogers Smith, Christopher H. Browne Distinguished Emeritus Professor of Political Science, about the implications of a 2nd Trump presidency and what the future of democracy may look like in the United States.

The Omnia Podcast: Democracy and Decision 2024 is a production of Penn Arts and Sciences in collaboration with the Penn Program on Opinion Research and Election Studies. Many thanks to today's guest John Lapinski from the Department of Political Science.

Be sure to subscribe to the Omnia Podcast by Penn Arts & Sciences on Apple Podcasts or wherever you get podcasts, to listen to every episode of Democracy and Decision 2024 |