Red Mirage Update

November 3, 2020

Preview: *Red Mirage* forming, "It ain't over till it's over"

- Shift to VBM evident (+ early in person) at or beyond expectations
  - VBM already ~38% of record <u>expected</u> turnout
- Partisanship of vote patterns and counting timelines continue to promise a *Red Mirage* on election night
- Public opinion context is troubling: widespread questions of VBM ballot legitimacy and continued expectations of an election night decision
- Media context is encouraging from one report on *Red Mirage* in PA, another focusing reporting on close races with high VBM throughput
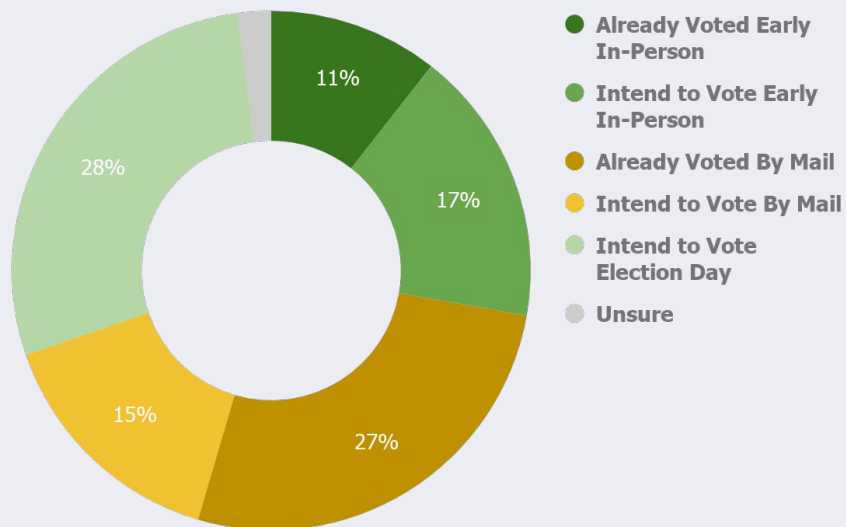- As technical professionals: "It ain't over until it's over"
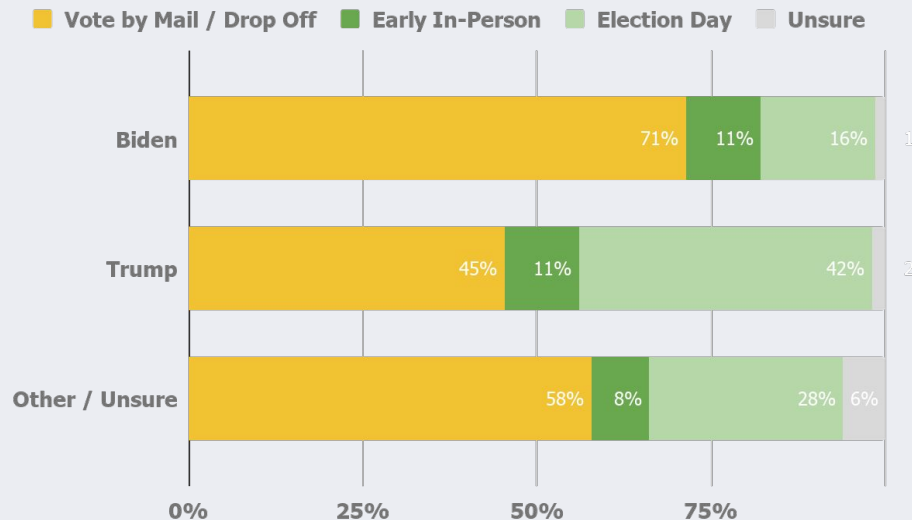
VBM likely most popular voting method in 2020

VBM already almost 45% of 2016 turnout
Almost 3 out of 4 Biden supporters likely to mail-in, drop-off their ballot

## All Respondents Vote Method and Status

- ● **Already Voted Early In-Person** — 11%
- ● **Intend to Vote Early In-Person** — 17%
- ● **Already Voted By Mail** — 27%
- ● **Intend to Vote By Mail** — 15%
- ● **Intend to Vote Election Day** — 28%
- ● **Unsure**

Vote Method by Candidate Support

■ **Vote by Mail / Drop Off**   ■ **Early In-Person**   ■ **Election Day**   ■ **Unsure**

	Vote by Mail / Drop Off	Early In-Person	Election Day	Unsure
Biden	71%	11%	16%	
Trump	45%	11%	42%	
Other / Unsure	58%	8%	28%	6%

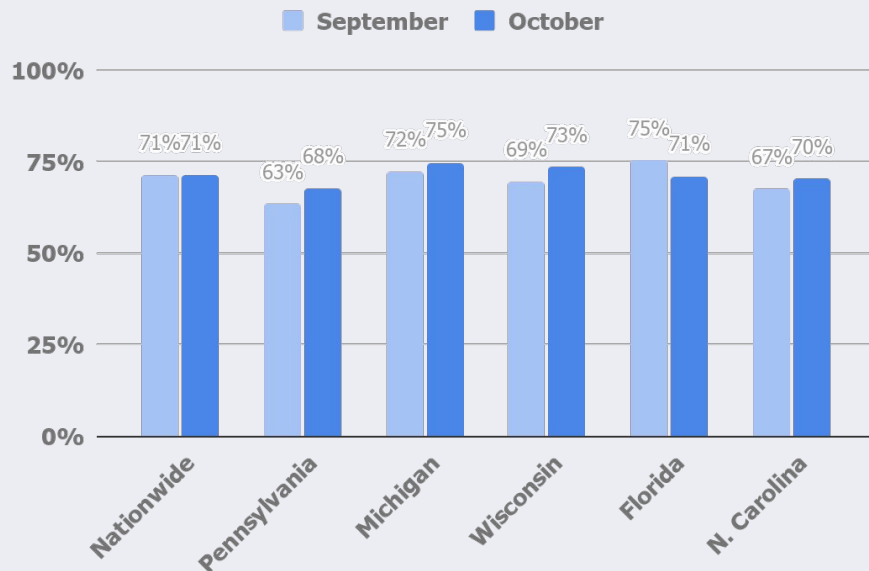*Source: Hawkfish Research 10/15/2020 - 10/22/2020, n=13,738*

Virus concerns for in-person voting stable & partisan

Few Trump supporters see risks of in-person voting despite increasing COVID spikes

% of Trump Supporters Concerned

■ September ■ October

% of Biden Supporters Concerned

■ September ■ October
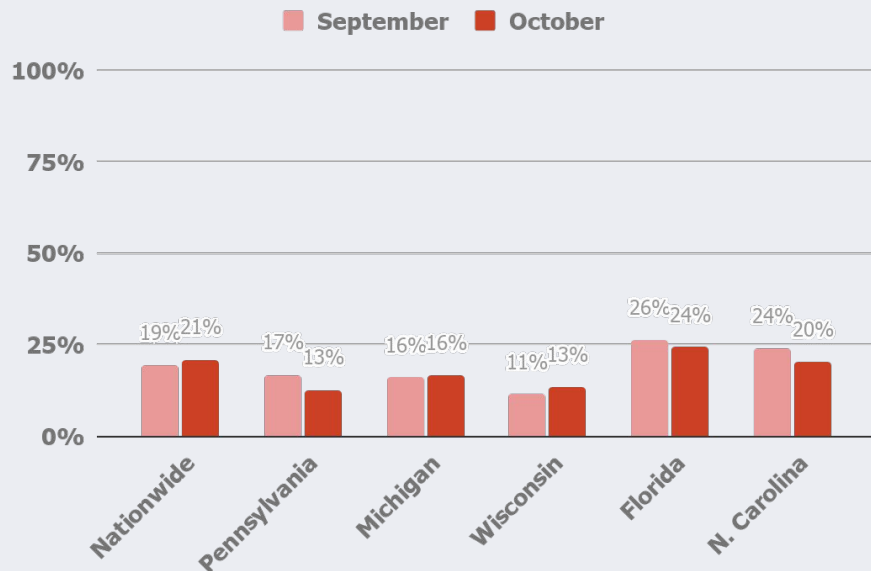
What is your sense of risk of being exposed [...] to the virus by going to a polling place on election day?
Sources: Hawkfish Research 09/09/2020 - 09/14/2020, n=9,771 | Hawkfish Research 10/15/2020 - 10/22/2020, n=13,738

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State rules create delays and risks for VBM processing

State	Swing State	Signature Match, Witness, Notary, Envelope Required	Greater than 3x Past Volume	Ballot Processing Starts on Election Day	Ballots Accepted after Nov 3
Pennsylvania	✔	✔	✔	✔	11/06/2020
Wisconsin	✔	✔	✔	✔	
Michigan	✔	✔			
North Carolina	✔	✔	✔		11/12/2020
Mississippi		✔	✔	✔	11/10/2020
New York		✔	✔		11/10/2020
West Virginia		✔	✔		11/09/2020
Georgia	✔	✔	✔		
Minnesota	✔		✔		11/10/2020
Nevada	✔	✔	✔		11/10/2020
Ohio	✔	✔			11/13/2020
Illinois		✔	✔		11/17/2020
Maryland		✔	✔		11/13/2020
New Jersey		✔	✔		11/09/2020

Focusing on swing states that say they won't be timely 🦒

State	State Reported concerns	Specific Risks	*FiveThirtyEight* (Nov. 1)
Pennsylvania	"Overwhelming majority" of ballots counted by 11/06. - Secretary of the Commonwealth	- Ballot delivery deadline - No preprocessing - Legal disputes mounting	+4.9 pp Biden
Michigan	Doesn't expect final results until at least 11/06. - Secretary of State	- Limited pre-processing - "Chronic" USPS delays in Detroit	+8.4 pp Biden
Wisconsin	Confusion could reign; Milwaukee not expected until 11/04. - State Election Commission	- Strict ID and witness requirements - No preprocessing - Decentralized, limited election staff	+8.3 pp Biden
Minnesota	There might not be "instant gratification" on election night. - Secretary of State	- Ballot delivery deadline - Tabulation starts on Election Day - USPS delays in parts of state	+9.1 pp Biden
Georgia	"May take until Wednesday" to know who has won. - Secretary of State	- 2020 Primary "meltdown," cascade of failures - Continuing litigation	+1.6 pp Biden
Arizona	Late arriving ballots counted on 11/04. Will be a "backlog." - Maricopa County Director	- In 2018 Midterm, over 475k uncounted ballots on Election Night	+3.0 pp Biden
North Carolina	Party leaders say some election results could take longer to tally... - Buncombe County	- Ballot delivery deadline 11/12 - Legal challenges in curing process	+2.1 pp Biden

# Scenario A: Delays in limited number of close states

With Biden's current lead nationally and in specific states (*FiveThirtyEight* avgs)

If 7 high risk states are able to count 2/3 of their VBM ballots on election night, and **other states count (virtually) all their VBM ballots on election night...**

High Risk States

66%

0%
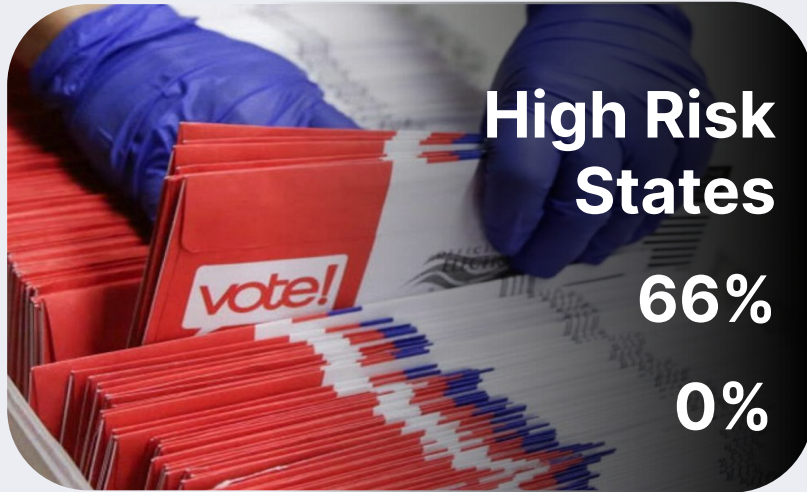
VBM Ballots Counted

VBM Ballot Rejections

All Other States

100%

0%
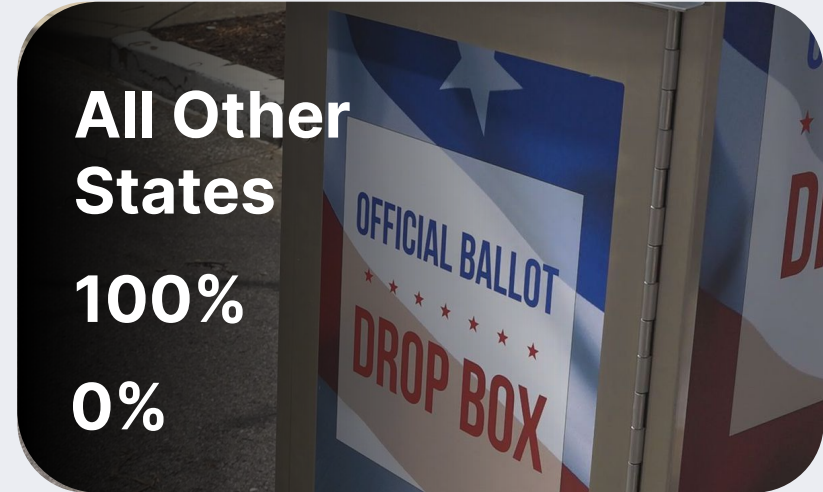
FiveThirtyEight state averages are as of November 1, 2020.
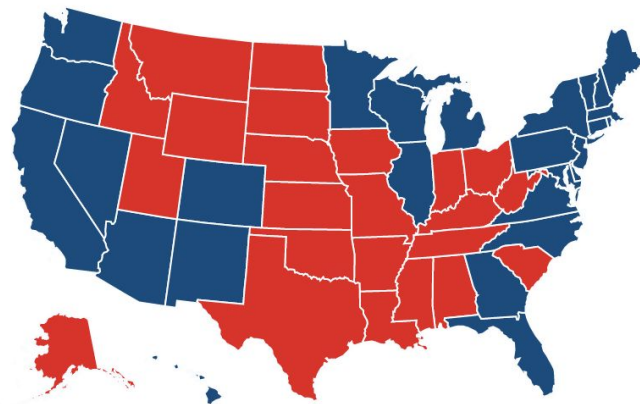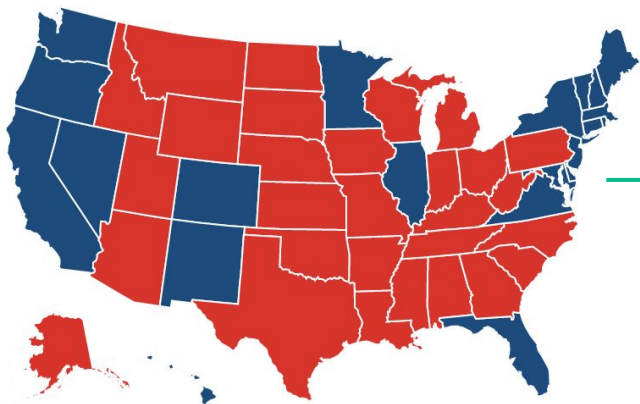
Scenario A: Limited VBM delays engender *Red Mirage*

	Initial VBM Counted	Rejection Rate
PA, MI, WI, MN, GA, AZ, NC	66%	0%
All Other States	100%	0%

If 7 states unable to complete VBM tally, **Trump leads** in Electoral Votes; win in Florida hints at final Biden victory

Initial 94% (Total) of VBM Counted

Final When __All__ VBM Counted

Biden - **262**   *270*   **276** - Trump

Biden - **350**   *270*   **188** - Trump

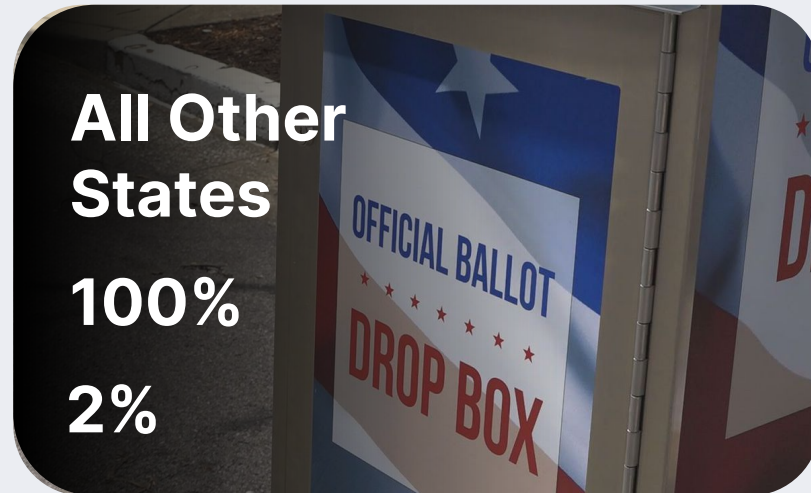# Scenario B: VBM Delays + non-partisan rejections

With Biden's current lead nationally and in specific states (*FiveThirtyEight* avgs)

If high risk states are able to count 2/3 of their VBM ballots on election night, and 5% of their VBM ballots are rejected (due to postal delays, signature matching, or other technical challenges)...

High Risk States

66% — *VBM Ballots Counted*

5% — *VBM Ballot Rejections*

All Other States

100% — VBM Ballots Counted

2% — VBM Ballot Rejections

FiveThirtyEight state averages are as of November 1, 2020.

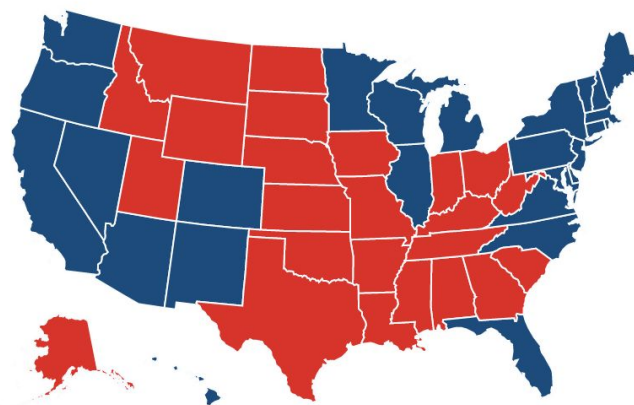# Scenario B: Limited delays + non-partisan rejections

	Initial VBM Counted	Rejection Rate
PA, MI, WI, MN, GA, AZ, NC	**66%**	**5%**
All Other States	**100%**	**2%**

Limited non-partisan rejections (e.g. late ballots) likely inconsequential (trailing in MN on election night and lose GA in final results)

Initial 94% (Total) of VBM Counted

Final When All VBM Counted
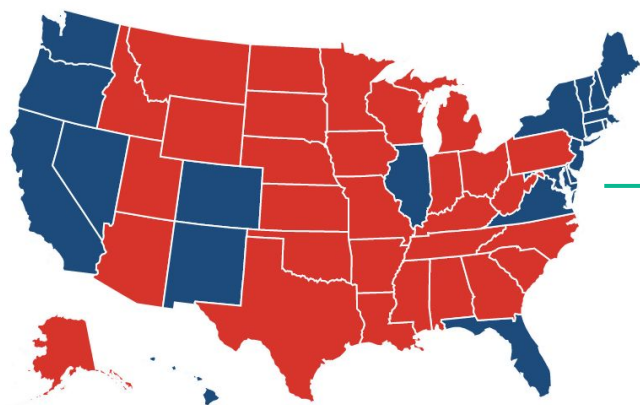
Biden - **252**   *270*   **286** - Trump

Biden - **334**   *270*   **204** - Trump

VBM ballot concerns (among Trump supporters) remain
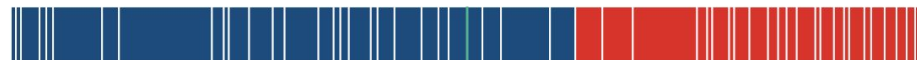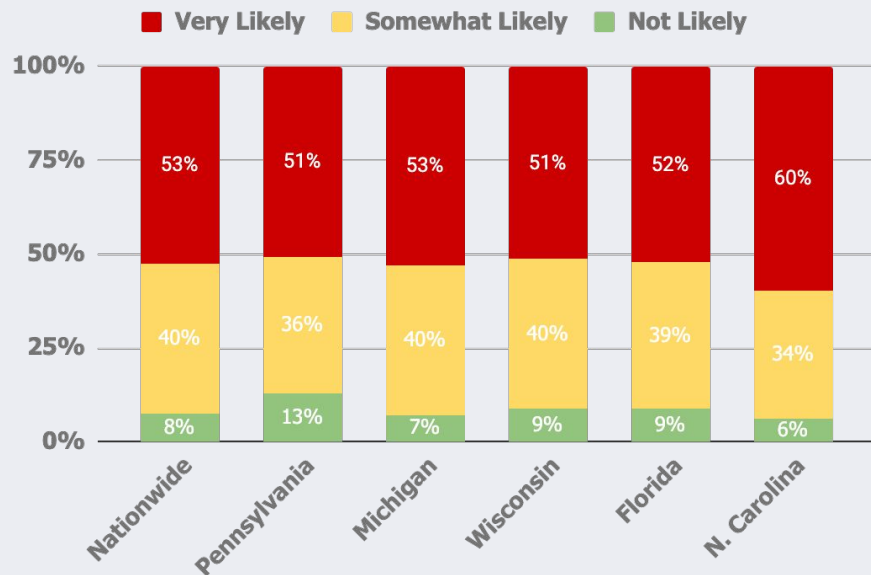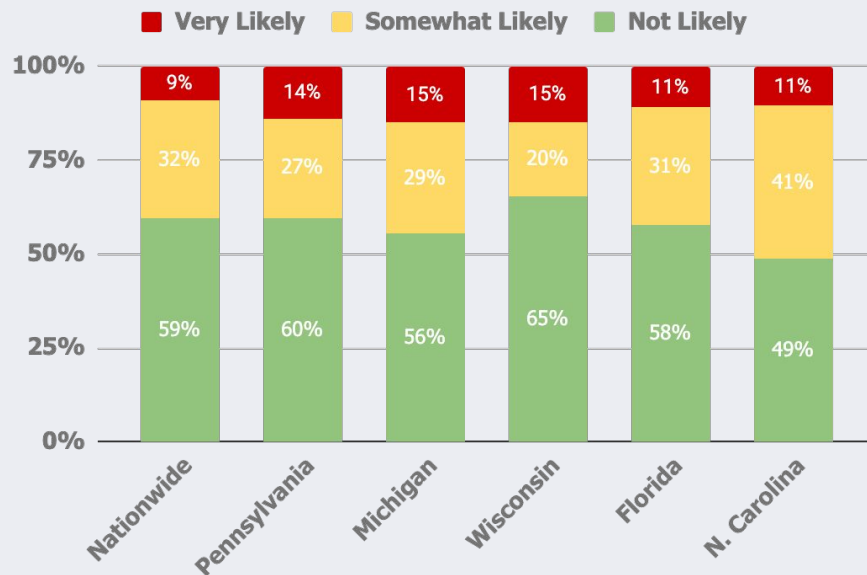
Even some Biden supporters see risk of substantial number of illegitimate ballots, creating opportunity for fraud claims to stick

% of Trump Supporters Concerned

Legend: Very Likely, Somewhat Likely, Not Likely

	Nationwide	Pennsylvania	Michigan	Wisconsin	Florida	N. Carolina
Very Likely	53%	51%	53%	51%	52%	60%
Somewhat Likely	40%	36%	40%	40%	39%	34%
Not Likely	8%	13%	7%	9%	9%	6%

% of Biden Supporters Concerned

Legend: Very Likely, Somewhat Likely, Not Likely

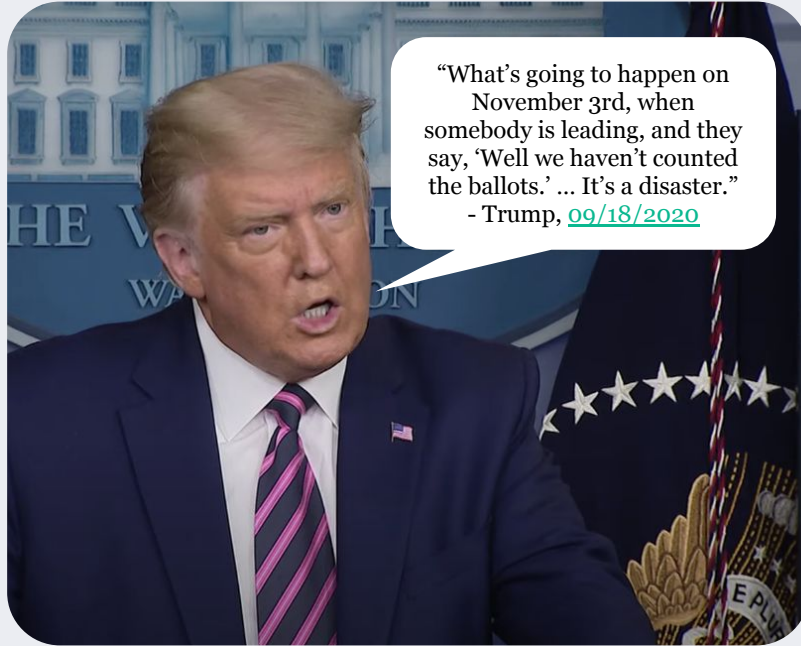|	Nationwide	Pennsylvania	Michigan	Wisconsin	Florida	N. Carolina
Very Likely	9%	14%	15%	15%	11%	11%
Somewhat Likely	32%	27%	29%	20%	31%	41%
Not Likely	59%	60%	56%	65%	58%	49%

How likely do you think a substantial number of ballots [mail / drop-off] should not be counted?
Source: Hawkfish Research 10/15/2020 - 10/22/2020, n=13,738

Trump set to leverage lead & expectations

"What's going to happen on November 3rd, when somebody is leading, and they say, 'Well we haven't counted the ballots.' … It's a disaster."
- Trump, 09/18/2020

Donald J. Trump ✔ @realDonaldTrump · Jul 30
Must know Election results on the night of the Election, not days, months, or even years later!

💬 35.7K   ⟲ 42.6K   ♡ 176K   ⬆

Scoop: Trump's plan to declare premature victory AXIOS 11/01/2020

President Trump has told confidants he'll declare victory on Tuesday night if it looks like he's "ahead," according to three sources familiar with his private comments.

Media seeing around corners, acting responsibly

'Red mirage' possible in Pennsylvania as officials urge voters to be patient

The Keystone State could take days to record and report a record volume of mail-in ballots

FOX NEWS

TheUpshot   The New York Times

Needle Update: What to Expect on Election Night

This year, an additional reason the results will be unrepresentative is the method of vote count. Our needle needs to know not only where votes remain uncounted, but also whether they were cast mainly on Election Day, early in-person or via mail. For most states, we just won't have that data in real time.

Summary: *Red Mirage* forming, "It ain't over till it's over"

- Shift to VBM evident (+ early in person) at or beyond expectations
  - VBM already ~38% of record <u>expected</u> turnout
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- Public opinion context is troubling: widespread questions of VBM ballot legitimacy and continued expectations of an election night decision
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- As technical professionals: "It ain't over until it's over"

Appendix

Methodology

Inputs, analyses, and scenarios

To assess vote choice and intention to vote by mail versus at one's polling place, we surveyed above 13,783 registered voters in fifty states and the District of Columbia between October 15, 2020 and October 22, 2020. Responses were filtered to those who said they were likely to vote and weighted to represent state and national registered voter demographics.

Our survey data allowed us to calculate state-specific estimates of vote choice for each voting method, adjusting vote choice to recent published state and national *FiveThirtyEight* estimates (October 24, 2020).

For our scenarios, we assumed that all votes at the polls will be counted on election day (November 3).

While projections of how long it will take for states to handle the higher volume of VBM ballots vary greatly, the Brookings Institute suggests "we may have to prepare for election week, or even election month." For mail-in ballots, we grouped states by several VBM reporting risk factors, and we adjusted the counting and rejection rate for each group.

Election integrity concerns, delays blamed on others

In open responses, Biden and Trump supporters fear bad actors
Trump supporters fault Democratic Party, Biden supporters deride Trump
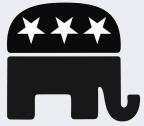
Trump Supporters

"Democratic tampering."

"Fraud by Democratic Party."

"Democrats not liking the preliminary results."

"Democrats scrambling to 'find' more votes for Biden."

"Democrats filling out extra ballots."

"Democrat denial."

Biden Supporters

"Trump trying to block mail-in votes for political gain. Thank ACB."

"Trump being an asshole about losing and causing a delay."

"Trump lawsuit."

"Trump's malignant narcissism."

"Trump's failure as a human being."

"Foreign interference."

If there are delays in getting to a final result, what do you think will be the reasons?
Source: Hawkfish Research 10/22/2020 - 10/29/2020, n=11,507