



May 5, 2020

TO: Interested Parties
FROM: Erik Iverson, President and Managing Partner, Moore Information Group
RE: Montana Survey Methodologies Memo

Today, Montana State University released results from a survey it conducted showing Governor Steve Bullock leading Senator Steve Daines by a margin of 46%-39%. As a graduate of Montana State University's Political Science Department, it pains me to say it, but this survey has two major flaws:

- The survey does not reflect an accurate demographic model of likely General election voters in the Montana "voter" portion of this survey – particularly in regard to age and political party identification.
- Survey respondents were not garnered from a voter list and instead they were asked to "self-report" voter registration.

These methodological flaws, which are detailed below, are so egregious as to render the results meaningless.

1) The survey does not reflect an accurate demographic model of likely General election voters in the Montana "voter" portion of this survey. These fundamental demographic errors are likely a direct result of the online methodology used and, in fact, stand in stark contrast to recent survey results from a verified voter sample and even to MSU's own results from a survey it conducted in 2018.

Age: The table below shows results from 3 polls - this MSU survey, a Moore Information Group live-caller phone survey that used verified voter list sample, and a mail survey conducted by MSU in 2018. What you see illustrated here is the severe, methodological restrictions of conducting a survey via online panel in Montana. Online panels skew young and that is reflected in these results.

Don't like the MIG demos? Okay, look at MSU's own age demos from this survey compared to its own 2018 mail survey (which incidentally pretty accurately predicted both the Senate and House race results that year in Montana). The age results between MSU's own surveys are basically flipped in terms of older and younger voters. Now, you can say, "well, that was a mid-term election, and this is a Presidential year election" and that's true, you'll get a few more younger voters turnout in a Presidential year. But not 24% more – and you are certainly not going to see a 25% drop in the portion of the vote that is comprised of voters age 70+. The point is, the MSU voter sample is not representative by age and that has a direct impact on the ballot, as Bullock does far better among 18-29-year-old voters and Daines does better with 70+ voters. If you tinker with these age breaks it makes a significant impact on the ballot results. These numbers matter for accuracy.

Age category	MSU panel survey results among "likely 2020 voters" (N=459)	Moore Information Group live-caller phone survey results among verified likely 2020 voters (N=500)	MSU mail survey results among likely 2018 voters (N=2079)
18-29	29%	11%	5%
30-39	26%	15%	9%
40-49	18%	14%	9%
50-59	12%	19%	16%
60-69	9%	15%	30%
70+	6%	25%	31%

Party ID: Similar to the age demos, the party identification numbers in the MSU survey are simply wrong. Way wrong. Look at the party identification numbers in all of these surveys. Same story as age, just a different demographic. Again, if you don't like the MIG party distribution, fine, take the word of MSU's own party data in 2018. MSU's assertion the GOP turnout advantage in 2020 will only be +3% when it was +15% in 2018 simply doesn't pass the smell test. These party demos matter as Republicans overwhelming support Daines and Democrats overwhelmingly support Bullock. If you have too few Republicans in your sample and too many Democrats in your sample, as this survey does, it will greatly influence the ballot result. And that's how MSU got a +7% Bullock lead on the ballot. They have roughly 6% too many Democrats and roughly 4% too few Republicans in their sample – meaning party is off a whopping 10%. That has certainly skewed the ballot test.

Party ID	MSU panel survey results among "likely 2020 voters" (N=459)	Moore Information Group live-caller phone survey results among verified likely 2020 voters (N=500)	MSU mail survey results among likely 2018 voters (N=2079)
Democrat	34%	28%	25%
Republican	37%	41%	40%
Independent	24%	22%	25%
Other	5%	7%	11%
GOP advantage	+3%	+13%	+15%

2) **Survey respondents were not garnered from a voter list and instead were asked to "self-report" voter registration.** MSU survey participants were recruited from an online probability panel where consumers opt-in and agree to participate in the panel. These consumers were then screened to include only those who self-report to be a registered voter, self-report to be likely to vote and self-report to show "interest in political campaigns." This is not the same as conducting a survey among registered voters who have been verified by the Secretary of State. Additionally, and importantly, this is not the same as having verified proof that each respondent actually lives in Montana and has verified voter registration in the state.

This is not to say that all on-line voter panel surveys are methodologically suspect. They are not. But you need to know how to do it correctly. Using opt-in panel methodology is a legitimate way to conduct a survey among "voters" – but is not a statistically reliable way to conduct a statewide "voter" survey in a state with as small of a population as Montana. The entire voting population of Montana is simply too small to possess enough people who have "opt-ed in" to a panel to conduct a statistically reliable survey. And what happens when you don't have enough people in the panel to conduct a proper survey that reflects actual voter turnout? You get a sample that doesn't reflect voter population or turnout accurately, and you

then must “weight” the data. Meaning, you “correct” the data you actually got so that it more closely matches the demographics of a likely voter turnout universe.

To its credit, MSU admits it relies heavily on weighting, in some cases by factors as high as 6.0.

This is important, and a tad alarming. When you tinker with one portion of the sample it impacts everything else. When weighting gets too heavy, it’s like putting a brick on Jell-O. And these sorts of heavy weighting changes can seriously impact things like, say, the Senate ballot in Montana.

Let’s explore a bit MSU’s admission they “limited” their weighting factors to 6.0 to avoid “overweighting the data.” So, what does a factor of 6.0 mean? Why does that matter? Well first of all, a weighting factor of around 1.5-2.0 is considered acceptable weighting by industry standards. A weighting factor of 6.0 is outside of industry practices that it can scarcely be called polling. What a 6.0 weighting factor means is MSU has essentially taken the individual responses on one person, let’s say a female age 18-34, and turned her set of responses into the equivalent responses of six people. That is what weighting does. Because MSU used an on-line panel in a small population state like Montana, they were forced to either inflate or diminish individual responses in order to obtain something close to their desired demographics for their flawed voter turnout model (discussed above). Again, a public opinion researcher can legitimately take the responses of one individual and either inflate or diminish them by a factor of 1.5-2.0, but a factor of 6.0, which MSU admits to using, is not aligned with industry best practices. Not by a long shot.

In sum, I don’t believe MSU is intentionally trying to mislead the public with these numbers. I know some of the folks who worked on this survey. They are good, decent people. What I am saying, is the data should be viewed with a heavy dose of skepticism and through the lens of the methodological issues outlined above.

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