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THEY SAID IT

“The Experts get more wrong all the time.”

--President Harry Truman on public opinion polls to Clark Clifford,
October, 1948

“Polls are only good for dogs.”

--John G. Diefenbaker, Conservative Prime Minister of Canada
(1957-1963)

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POLLING PROBLEMS, PART II: WHO'S WINNING?

With just over two weeks left until election day, the Presidential campaign of 2004 is proving to be not only one of the most fascinating ones in recent memory, but one of the more mysterious and unusual as well. Though Mark and I have our own beliefs about who will win and by how much, and have not been shy about sharing those expectations, the fact of the matter is that most pundits, pollsters, and prognosticators are still unwilling to pick a likely winner or to back up their tepid picks with anything more than “gut instinct.” The experts insist that the electorate is evenly divided, just as it was in 2000, and that this split makes it very difficult to pick a winner, even with only a handful of days left before the campaigning ends and the ballots are cast.

On the one hand, I strongly disagree with the contention that the nation is, as it was four years ago, split 50/50. Regardless of which candidate wins, I think the margin of victory will surprise most of the so-called experts, with the victor taking the race by a fairly comfortable margin. On the other hand, I can't help but agree that accurately predicting which candidate will earn that comfortable margin is, at this point at least, difficult. Throughout the campaign, and especially in the last couple of months, most of our traditional public measures of political sentiment have proven volatile at best and downright unreliable at worst.

Last week, I noted that much of the polling data with which we are bombarded every day is largely undependable. Specifically, I wrote that most voter surveys “are not nearly as predictive as the pollsters and mainstream media would have us believe,” and “should be viewed as indicative of general trends and little else.” Though the bulk of pundits and prognosticators insist that polls effectively capture public sentiment and likely vote totals, they really do nothing of the sort. Indeed, this week, there is further evidence that the

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polls, which dominate all political discussion in the weeks leading up to an election, are not to be taken terribly seriously. And note for the record, that I write this even though the current polling trends tend to jibe well with my expectation that President Bush will win re-election.

One of the polls I singled out for derision last week and the week before was *Newsweek's*, which has, over the last month or so, shown extreme volatility and highly improbable swings in both candidate preferences and partisan affiliation of respondents. The new *Newsweek* poll (published in today's edition, but made public late last week) demonstrates once again why the magazine's survey results simply cannot be trusted. For starters, the new poll shows another great shift in sentiment, with President Bush now leading Senator Kerry by six points (50 to 44). But more to the point, the poll also shows women favoring Bush over Kerry by six points (49-43) and men favoring Kerry over Bush by four points (50-46).

Now, anyone who has been following this campaign even peripherally knows that to come up with these numbers, *Newsweek* had to do considerable massaging, to put it delicately. Sure, Bush and his advisors have made a concerted effort to close the "gender gap" that has characterized the electorate since at least 1992. But to suggest that the gap has not only been closed but that the trends have actually reversed is ludicrous. If *Newsweek* reported that Bush leads comfortably among *married* women, I'd hardly be surprised. But among women in general? You've got to be kidding. That's almost as absurd as suggesting that Kerry would be ahead among men (outside the margin of error, nonetheless). If ever one needed proof that *Newsweek's* polls are worth less than the paper they're printed on, here it is.

But as unreliable as *Newsweek* has been, its pollsters are hardly alone in their inability to foretell voter behavior in the post-9/11 world. A number of poll-watchers have reminded us over the past couple of weeks that most pollsters – including the renowned John Zogby – were simply dreadful in 2002, the first post-9/11 national election. Not only did the forecasters miss

their marks, in some cases by 8, 9, and 10 points, but their poor showing stemmed directly from consistent *under-polling* of Republican voters. *National Review's* Jim Geraghty put together the following summary of predictions and actual results from the 2002 Senate election:

Minnesota

In Minnesota, Zogby had Walter Mondale over Coleman by 6 points. The *Minneapolis Star* had Coleman down 5 in its last poll. Final: Coleman 50, Mondale 47. Coleman by 3.

Colorado

In Colorado, Zogby had Strickland over Allard by 5 points, but at the end of October he had Strickland by 9. The *Rocky Mountain News* had Strickland by 4. The *Denver Post* had Strickland by 1. Final: Allard 51, Strickland 46. Allard by 5.

New Hampshire

In New Hampshire, the *Concord Monitor* had Democrat Shaheen over Republican Sununu by one, FPC/WNDS-TV had Shaheen by 5, University of New Hampshire had Shaheen by 4, then had Sununu by 1. Final: Sununu 51, Shaheen 47. Sununu by 4.

Texas

In the Texas Senate race (not that Texas is a swing state) Zogby's final poll had Republican Cornyn over Democrat Kirk by 4 points, and a day earlier had Cornyn up one. The *Dallas Morning News* had Cornyn up 9, Survey USA had Cornyn up 8. Final result: Cornyn 55, Kirk 43. Cornyn by 12.

Georgia

In the Georgia Senate race the final four polls were Zogby showing Democrat Cleland up by 2, Zogby showing a tie, *Atlanta Journal-Constitution* showing Cleland

up 3, and Mason-Dixon showing Cleland up 6. Final result: Not even close. Republican Chambliss 53, Democrat Cleland 46, Chambliss by 7.

North Carolina

In the North Carolina Senate race the final five polls were Zogby showing Republican Dole up by 10; Zogby showing Dole up 6, Carolina Poll showing Dole up 7, Survey USA showing Dole up 4, and Mason-Dixon showing Dole up 6.

Final result: Dole 54, Bowles 45. Dole by 9. Only Zogby's last-second "correction" poll was close.

Iowa

In Iowa, the *Des Moines Register* had Democrat Harkin with a moderate 9-point lead, but SurveyUSA had Harkin beating Republican Ganske by an overwhelming 22 points.

Final result: Harkin 54, Ganske 44. Harkin by 10.

Geraghty notes that there were a few exceptions (most notably in Missouri, where Republican Jim Talent barely squeaked by, despite having led in the polls by a comfortable margin), but by and large the pollsters were wrong, were wrong by significant numbers, and were wrong specifically because they undercounted Republican voters.

Of course, no one can know for sure how any of this will translate into pollsters' predictive capacity this year. But I think one can safely assume that pollsters using models developed prior to 9/11 (which is just about everyone) run the risk of miscalculating by a considerable margin. As I wrote last week, polls are not wholly invaluable, but they should be read with reasonable skepticism.

Yet, if we can't trust the polls, how do we know who's winning? Well, as some readers pointed out to us after last week's issue, the futures markets can have

predictive capacity that far exceeds that of pollsters. And indeed, there is a considerable body of research supporting this very contention.

I certainly agree that futures markets can provide considerable insight. And I have, therefore, been following the progress of the respective candidates in both the Iowa Futures Market and at Tradesports for most of the year. But I am a little concerned that these markets may be susceptible to manipulation. Given the stakes in this election and the amount of money some players have "invested" in the outcome, I would hardly be surprised if a concerted effort were made to influence the futures markets for the purpose of affecting the moods in the campaigns, thereby affecting the outcome of the vote.

In fact, we know that such efforts to manipulate the market have already taken place, most recently late last week. Author, blogger, and independent economist Donald Luskin noted over the weekend that on Friday (Oct. 15), there had been an attempt to tank Bush futures at Tradesports, the fourth such attempt in the last several weeks. Specifically, Luskin wrote:

Yesterday the price of the futures were sold down from about 55 (indicating the market's estimate of a 55% probability of Bush's re-election) to 10 (indicating a 10% probability) with a single 10,000-lot order entered by a single trader. An order that size represents twice the normal volume of an entire typical day's trading . . .

According to sources at Tradesports, yesterday's order was entered by the same individual who has heavily sold the Bush futures three times over the past month. The first instance was on September 14, when this trader sold the futures down from the mid-60's to 49.6. The second instance was in the middle of the second presidential debate on October 8, when the futures were sold down from the high 50's to 51.5. The third instance was right after the third

presidential debate on October 13. As the debate began the futures were priced at 57, and by the end of the debate they had risen to 60. Then a few moments later they were beaten down to 54 in a matter of minutes.

In markets this kind of behavior is called a “speculative attack.” The idea is not to sell at the highest price possible – the normal profit-maximizing strategy of a typical seller. Rather, the idea is to use one’s selling to deliberately cause prices to fall . . . [I]n a speculative attack the motive is more complicated. It is to cause people in the real world – not just other traders – to panic.

Who, you ask, might want to manipulate the futures markets thusly? Luskin has a theory. To wit:

The classic example of a speculative attack is when George Soros massively shorted the British pound in September 1992 . . .

It’s all based on what Soros has often written about as his “theory of reflexivity.” It’s when financial markets affect the real world, and then the real world in turn affects financial markets. It’s a vicious cycle set in motion on purpose. Here’s a speculation of a different sort: could Soros be behind the manipulation of the Tradesports Bush futures? The amounts of money involved are pocket change to Soros. And it would fit his avowed intention to unseat the President.

Luskin is, of course, careful to note that he has no knowledge of whether Soros had anything to do with the Tradesports manipulation or not, merely theories. He also notes that the effort to shake up the market has thus far been “wholly unsuccessful,” with all four attempts failing to produce a significant, long-term price change or any sense of panic. That said, there is little doubt that someone is at least *trying* to manipulate the Tradesports futures market, with the apparent aim of inducing pessimism among the Bush crowd.

There has, to the best of anyone’s knowledge, been no similar attempt to influence the Iowa Futures Market, but that doesn’t necessarily mean there won’t be. Whoever is trying to tank the Bush futures contracts undoubtedly knows full well that the generally market-savvy Republican base would almost certainly treat a severe dip in the contract prices as a very bad sign. And it is, in my opinion, more than reasonable to conclude, based on that fact alone, that another attempt will almost certainly be made before election day.

So where does that leave us? The polls are unreliable; and the futures markets, while possibly more dependable, appear to be under stress from external and malevolent forces. So are there any other objective measures by which the leader in the race can be determined? To be perfectly honest, there really aren’t. But there are a handful of subjective signs which can, at least, be used to guess the state of the race.

Over the next 15 days, the respective campaigns themselves may be the best source for information about how the race is playing out. For example, it will be worthwhile to watch where the candidates campaign and where they spend campaign dollars, and to extrapolate from that how comfortable each one is with his prospects.

It should therefore be of at least mild reassurance to Republicans that, for the most part, the ground battle is currently being waged on Gore/Kerry territory. With the exception of Ohio and Florida (two enormously important exceptions, I know) nearly all of the states currently and recently targeted by the candidates, their running mates, and their wives are blue, or at least they were in the last election. Iowa, Minnesota, Wisconsin, Pennsylvania, New Mexico, and Oregon are all states that appear repeatedly on the candidates’ or their surrogates’ schedules. As *National Review’s* Geraghty notes, “Right now, Kerry and Edwards are putting enormous time... into defending blue states. This could change. But for now, Kerry’s playing defense, while Bush plays offense.”

And while this may seem a tad inconsequential, given that Florida is generally considered a “must have” for President Bush, that is not necessarily the case. Indeed, it is actually possible for Bush to lose Florida and its impressive 27 electoral votes yet suffer no permanent damage, if he makes up for that loss by taking Minnesota (10 e. votes), Wisconsin (10 e. votes) and Iowa (7 e. votes). Ideally, the President wants to retain both Florida and Ohio, the two red states that appear to be high on Kerry’s target list. But given the number and size of the other remaining states that both sides appear to concede are still in play, losing one or the other (though certainly not both) would not be a death blow to the President’s campaign.

Another sign to watch over the next couple weeks is the type of issues the candidates choose to discuss, both on the stump and in campaign ads. Again, this is wholly subjective, but it would appear that here too President Bush is at a slight advantage. While Bush is generally talking about his accomplishments, his opponent’s lack thereof, and the issues he intends to tackle in his second term, Kerry is, according to various reports, running around trying to exploit the fears and insecurities of various factions of the electorate in the hopes that he can scare them into voting (for him, naturally) on November 2nd.

Last week, for example, Kerry himself began openly discussing an issue he had heretofore left to media surrogates but which he apparently feels must be fully exploited to turn the theoretically important “youth” vote, namely the ominous specter of a military draft.

Though President Bush has repeatedly denied that he intends to reinstate the draft, including a statement to that effect in the third debate last week; though military officials and even Defense Secretary Rumsfeld have repeatedly stated their belief that a draft is not only unnecessary but would be potentially disadvantageous; and though the Democrat-sponsored draft resuscitation bill was defeated by an astoundingly lopsided vote of 402-2, with even its sponsor voting against it, Kerry-friendly media organizations – including MTV’s “Rock the Vote” and *The New York Times* – have for some time been trying to scare young

potential voters into pulling the lever for John Kerry by telling them that the President has “secret” plans to reinstate the draft if he is re-elected.

Until last week, Kerry himself had had the good sense to remain above the fray. But on Friday, at a rally in Milwaukee, Kerry told the crowd that “With George Bush, the plan for Iraq is more of the same and the great potential of a draft.” According to a *Washington Post* report on the comments, “Kerry offered scant evidence to support the allegation of an impending draft.” I think, though, that what the *Post* meant was that Kerry offered no --as in zero-- evidence to support the allegation.

Liberal blogger Mickey Kaus suggested that Kerry’s comments are characteristic of a campaign that is “flailing,” and it is hard to dispute this sentiment. If Kerry has been reduced to trying to scare voters – and voters who are notoriously apathetic to boot – then it would appear that his campaign has taken on just a hint of desperation.

Of course, however desperate Kerry may be, he is not stupid. So in addition to trying to frighten the young and lethargic, he has also targeted the old and motivated. Over the weekend, the Kerry campaign began running two new sets of ads, one claiming that Bush has promised “ardent, longtime supporters” that he will privatize Social Security in a second term and will cut seniors’ benefits to do so, and the other suggesting that President Bush in his “neglect” of the health care system is personally responsible for the shortage of the flu vaccine this year. As with draft charges, the fact that Kerry has, in these two ad campaigns, resorted not just to scaring potential voters, but scaring them with charges that are both untrue and easily countered suggests that his campaign may be “flailing.”

Is this a subjective assessment? Of course it is. But given the presumed tightness of the race, the inherent weaknesses in this year’s polls, and the apparent attempts to manipulate the futures markets, subjective assessments are quite possibly the best we have.

I wrote at the beginning of this piece that I don't believe this race will be as close as most "experts" believe. And throughout the year, both Mark and I have written that we believe the beneficiary of the larger-than-expected win will be President Bush. Both conclusions are entirely subjective. But if you want something more solid; if you're looking for reliable, objective, number-driven conclusions, then I expect it will be well into the evening on November 2nd, if even then, before you find them.

SCHOPENHAUER ON THE DEBATES

Well, the presidential election debates are over and I must say that I thoroughly enjoyed all of them. It would have been more fun, of course, if my guy George had done a little better. But that's how it goes. I continue to think that he will win, but I won't be surprised if I am wrong. As I've said before in these pages, I'm not very good at forecasting national elections. You see, for the life of me I can't understand how even one person could vote for John Kerry, so it's tough for me to grasp the fact that more than half the population might do so.

I also enjoyed the post-debates debates among the pundits, although over the years these sessions have become a little too predictable, which I think has something to do with the relatively small community of political gurus who are called upon to participate and the fact they all seem to know each other quite well. It's a little like watching Moe hit Curly on the head with a mallet over and over again. Amusing, but a little less so each time you see it.

So this week, just for fun, I thought I would inject some fresh thoughts into the post-debate scene. These are fresh not in the sense that they are new, because they are not. They are fresh in the sense that they are almost certainly new to the ears of the great majority of Americans, citizens and pundits alike.

The author of these thoughts is Arthur Schopenhauer. They first appeared in an essay entitled *Zur Logik und Dialektik*, which was included in a book of his less lofty philosophical reflections appropriately titled, *Parerga*, published in 1851. Not only do these observations provide an amusing basis from which to reflect on the past debates, but I believe that they are also pertinent to the on-going end-game in the presidential contest, which is becoming more cynical and more dishonest each day and is likely to be virtually out of control by election day.

With that said, here are some thoughts from a man who argued that life is filled with struggle, conflict, and ultimately dissatisfaction on the subject of "Controversial Dialectic," which he describes as "the art of disputing, and of disputing in such a way as to hold one's own, whether one is in the right or the wrong – *per fas et nefas*." This article is, I know, a change of pace for The Political Forum, but I hope you enjoy reading it as much as I did writing it. This essay has long been a favorite of mine.

For starters, Schopenhauer points out two factors that should be crucial to any debate analysis. The first is that a debate is not a search for truth but a battleground for opinions. He put it this way.

For if we take purely objective truth as our aim, we are reduced to mere Logic; if we take the maintenance of false propositions, it is mere Sophistic; and in either case it would have to be assumed that we were aware of what was true and what was false; and it is seldom that we have any clear idea of the truth before hand . . . Accordingly, in a dialectical contest we must put objective truth aside, or rather we must regard it as an accidental circumstance, and look only to the defense of our own position and the refutation of our opponent's . . .

If human nature were not base, but thoroughly honorable, we should in every debate have no other aim than the

discovery of truth; we should not in the least care whether the truth proved to be in favor of the opinion which we had begun by expressing, or of the opinion of our adversary . . . The way out of this difficulty would be simply to take the trouble always to form a correct judgment. For this a man would have to think before he spoke. But, with most men, innate vanity is accompanied by loquacity and innate dishonesty. They speak before they think; and even though they may afterwards perceive that they are wrong, and that what they assert is false, they want it to seem the contrary. The interest in truth, which may be presumed to have been their only motive when they stated the proposition alleged to be true, now gives way to the interests of vanity: and so, for the sake of vanity, what is true must seem false, and what is false must seem true.

Following the presentation of several such general observations, Schopenhauer presents a list of 38 specific “Stratagems” for winning in a debate, and writes expansively on each. I will present only a few of these that I think are fun to consider in light of the on-going presidential campaign, along with a few excerpts from the lengthy discourses on them.

Stratagem I: This consists in carrying your opponent’s proposition beyond its natural limits; in giving it as general a signification and as wide a sense as possible, so as to exaggerate it; and, on the other hand, in giving your own proposition as restricted a sense and as narrow limits as you can, because the more general a statement becomes, the more numerous are the objections to which it is open.

Stratagem II: The Homonymy: This trick is to extend a proposition to something which has little or nothing in common with the matter in question but the similarity of the word; then to refute it triumphantly,

and so claim credit for having refuted the original statement . . . Example 1. A.: You are not yet initiated into the mysteries of the Kantian philosophy.” B.: “Oh, if it’s mysteries you’re talking of, I’ll have nothing to do with them.”

Stratagem VIII. This trick consists in making your opponent angry; for when he is angry he is incapable of judging aright, and perceiving where his advantage lies. You can make him angry by doing him repeated injustice, or practicing some kind of chicanery, and being generally insolent.

Stratagem XII. If the conversation turns upon some general conception which has no particular name, but requires some figurative or metaphorical designation, you must begin by choosing a metaphor that is favorable to your proposition . . . The name *Protestants* is chosen by themselves, and also the name *Evangelicals*; but the Catholics call them *heretics*.

Stratagem XIV. When your opponent has answered several of your questions without the answers turning out favorable to the conclusions at which you are aiming, advance the desired conclusion, -- although it does not in the least follow, -- as though it had been proved, and proclaim it in a tone of triumph.

Stratagem XVIII. If you observe that your opponent has taken up a line of argument which will end in your defeat, you must not allow him to carry it to its conclusion, but interrupt the course of the dispute in time, or break it off altogether, or lead him away from the subject, and bring him to others.

Stratagem XIX. If you are called upon to say why a particular physical hypothesis cannot be accepted, you may speak of the fallibility of human knowledge, and give various illustrations of it.

Stratagem XXI. If your opponent uses a merely superficial or sophistical argument and you see through it, you can, if it is true, refute it by setting forth its captious and superficial character; but it is better to meet him with a counter-argument which is just as superficial and sophistical, and so dispose of him; for it is with victory that you are concerned, and not with truth.

Stratagem XXIII. Contradiction and contention irritate a man into exaggerating his statement. By contradicting your opponent you may drive him into extending beyond its proper limits a statement which, at all events within those limits and in itself, is true; and when you refute this exaggerated form of it, you look as though you had also refuted his original statement.

Stratagem XXIV. This trick consists in stating a false syllogism. Your opponent makes a proposition, and by false inference and distortion of his ideas you force from it other propositions which it does not contain and he does not in the least mean; nay, which are absurd or dangerous.

Stratagem XXVII. Should your opponent surprise you by becoming particularly angry at an argument, you must urge it with all the more zeal; not only because it is a good thing to make him angry, but because it may be presumed that you have here put your finger on the weak side of his case, and that just here he is more open to attack than even for the moment you perceive.

Stratagem XXIX. If you find that you are being worsted, you can make a diversion – this is, you can suddenly begin to talk of something else, as though it had a bearing on the matter in dispute, and afforded an argument against your opponent.

Stratagem XXXII. If you are confronted with an assertion, there is a short way of getting rid of it, or, at any rate, of throwing suspicion on it, by putting it into some odious category; even though the connection is only apparent, or else of a loose character. You can say, for instance, “That is Manichaeism,” or “It is Arianism,” or “Pelagianism,” or “Idealism,” or “Spinozism,” or “Pantheism,” or “Brownianism,” or “Naturalism” or “Atheism,” or “Rationalism,” “Spiritualism,” “Mysticism,” and so on.

Stratagem XXXV. Instead of working on your opponent’s intellect by argument, work on his will by motive; and he, and also the audience if they have similar interests, will at once be won over to your opinion, even though you got it out of a lunatic asylum; for, as a general rule, half an ounce of will is more effective than a hundredweight of insight and intelligence.

Stratagem XXXVI. You may also puzzle and bewilder your opponent by mere bombast; and the trick is possible because a man generally supposes that there must be some meaning in words . . . If he is secretly conscious of his own weakness, and accustomed to hear much that he does not understand, and to make as though he did, you can easily impose upon him by some serious fooling that sounds very deep or learned, and deprives him of hearing, sight, and thought; and by giving out that it is the most indisputable proof of what you assert.

Stratagem XXXVIII. A last trick is to become personal, insulting, rude, as soon as you perceive that your opponent has the upper hand, and that you are going to come off worst. It consists in passing from the subject of dispute, as from a lost game, to the disputant himself, and in some way attacking his person . . . in becoming

personal you leave the subject altogether, and turn your attack to his person, by remarks of an offensive and spiteful character.

So there you have some Schopenhauerian insights into the process of debate, some of which have been, I think, remarkably in evidence during the on-going campaign. But lest this leave you with the feeling that Schopenhauer was an unusually cynical and dishonest philosopher, I'll close with the following observation, which I think would serve both candidates well in the days ahead when the temptation to rely on falsehoods becomes intense. It is from another of Schopenhauer's essays. This one entitled *Ethical Reflections*.

A lie always has its origin in the desire to extend the dominion of one's own will over other individuals, and to deny their will in order the better to affirm one's own. Consequently a lie is in its very nature the product of injustice, malevolence and villainy. That is why truth, sincerity, candor and rectitude are at once recognized and valued as praiseworthy and noble qualities; because we presume that the man who exhibits them entertains no sentiments of injustice or malice, and therefore stands in no need of concealing such sentiments. He who is open cherishes nothing that is bad.

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