#248: Are Democrats being irrational? (David Shor)

Julia: Welcome to Rationally Speaking, the podcast where we explore the borderlands between reason and nonsense.

           Today's guest is David Shor. He's a political data scientist who got his start doing analysis for the Obama campaign when he was only 20 and now does consulting for various progressive groups. I've become a big fan of David's really insightful evidence-based discussions of political polling and strategy, so I reached out to him to get his thoughts on a question I'm interested in, which is whether politicians are being rational about how to win elections.

           Because, I suspect like a lot of you, I often look at politics and think, "Why did you choose to focus on that issue? Why did you frame your message that way? Why did you choose to run that candidate? That seems like such a bad call." And I wanted the take of a thoughtful insider about whether there really are good reasons that I'm not seeing for the choices that might seem to me to be unforced errors.

           So that's basically what David Shor and I talk about. We focus mostly on the Democrats in the US because that's what he has the most experience with, but I think a lot of the dynamics he talks about are more broadly applicable to politics and just human psychology in general.

           So here's my conversation with David Shor.

[musical interlude]

Julia: David, one thing I'm very interested in that I would love to hear your thoughts on is whether politicians and voters are more or less behaving rationally. That is, whether their choices make sense, given their goals.

           I've read and listened to a lot of your discussions of political campaigning, and I've gotten the sense that you think that politicians at least are being... maybe less than 100% rational in their choices of how to campaign, or what issues to focus on. Is that accurate?

David: Yeah. I think that one of the really big struggles of politics and working in politics is that the people who choose to work in politics are frankly super weird. I can speak for progressive politics; I'm sure there are tons of biases on the conservative side. But people who want to work in politics, they're obviously much more politically active. They generally are highly liberal, highly ideological people who predominantly live in two or three cities.

           And they're also super young. I think this is something that actually isn't really super well-known, is if you walk into the campaign headquarters of

the Biden campaign or the Sanders campaign or the Obama campaign, median age is maybe 26 or 27. I remember I was talking to someone who was in charge of a large presidential campaign's messaging operation and she was 25. This was less weird to me when I started working in politics and I was 20, but it is a real bias, that the people who come in, they're not just demographically different, but they're very ideologically different.

Just to put some numbers on this... There was this a great study by I think Eitan Hersh, where he basically convinced the Obama campaign in 2012 to allow them to do a survey of their staff and their volunteers. And they found that something like a third of the people who volunteered or worked on the Obama campaign said that income inequality was their greatest issue. And personally, it's probably the thing I care the most about too.

Less than 1% of voters said in the survey that income inequality was their greatest issue.

And so, it's a real challenge. I think that the way that that manifests, I see the big operational challenge in my job as: The people who run these campaigns and who make these decisions, myself included, are all really ideologically motivated and that ideological motivation can help us rationalize ourselves into doing things that are dumb.

I like to tell people that politics isn't actually that complicated. A lot of the advice that we give -- and I've worked with big teams of machine learning engineers, and I really liked the problems, and I think they're interesting -- but I think fundamentally politics is about talking about issues that people care about, running on popular things, not talking about or embracing unpopular things, and not overspending on ads, spending in places that are close. All of this advice isn't that complicated.

The problem is that when you're so ideologically motivated, it's very hard to actually follow through. And just to talk about that a little bit more, one of the really interesting parts of our industry in the post-Trump era, is that due to advances in web panel technology and a bunch of other things, it's now possible to really do A/B testing of television ads in a way that wasn't possible before. And what we found is that something like a third of the ads, the Democrats made in 2016 made people more likely to vote for Republicans. And so it's just an underrated --

Julia: Can you say anything about what kind of ads they were? I'm just curious.

David: Well, it's a mix. Sometimes it's just that they're badly produced and badly edited or whatever, but really when we went through and we polled people in our office, "How much do you like these ads," something that was really jarring was that the more people liked the ads, the worse it did.

And the reason is just that there's this very strong difference between -- demographically and in a bunch of other ways -- between swing voters who are... the median voter in a general election is 50 years old and doesn't have a college degree and doesn't live in a major city. What compels them or what they want to hear about or their values are very different than the people who run liberal progressive campaigns.

Just to give an example, we went back and tested the most shared political ad of the 2016 cycle, it's called Mirrors. Basically, it's something that Hillary Clinton did. There's a little girl and she's standing in front of the mirror. And then Donald Trump just says a bunch of horrible things, racist things, sexist things. He makes fun of disabled people and the little girl cries. People described it as very moving, but when we went and we tested it --

Julia: People inside the industry, you mean?

David: Yeah, people inside the industry, people in the media. I think it was very widely shared. The Hillary campaign spent quite a bit of money showing it to people.

But when we tested it, it made people more likely to vote for Republicans.

I think one reaction is to go, "Oh, well, these people are horrible." I'm not going to pass judgment, but when we looked at the open-ends where we ask people, "What do you think of this ad," something that really came through is there were a lot of working class people who were saying, "This election to me is about issues. Donald Trump is talking about immigration, he's talking about trade. I care about China. I care about jobs. And you're just trying to guilt trip me."

And it was something that made people angry. I'm not justifying or endorsing that view of the world, but I think it highlights the problems. And I see a big part of tech in politics is helping people step outside of that bias, actually measure what works and what doesn't so that we can iterate.

Julia: Yeah. I'm not at all surprised to hear that people who work on political campaigns are unrepresentative of the average voter.

But I *am* a little surprised that there's not more success at overcoming that bias, just because it seems like there would be such a strong incentive to form accurate beliefs about how to win and to be strategic.

There's so many cases in the world where people behave irrationally and it's very understandable, because they don't have a really strong incentive to get things right. But this seems like a case where there's a huge incentive to get things right, about how to win over voters. And there's

plenty of means too, not just motive. There's tons of money that can go into this. And the incentive is immediate – like, you want to win *this election*. It's not like some abstract, decades-down-the-road reward.

Am I wrong to be surprised that those accuracy incentives don't overwhelm the ideology more?

David: I think that there's two points. One is... in some sense it's surprising. I think there's two problems.

The first is that measurement is really hard in politics. Like, if you were selling razors, I don't know, if you were Dollar Shave Club and you put out ads and then people click on the ads and then go and you buy them, there is an entire system of ad tech designed to optimize that sort of thing. But in politics, you don't observe your conversions. That's something that makes everything very hard.

In the corporate space, not only can you usually get some kind of individual level response for whether something worked or didn't, but even if you can't, you have very high frequencies, zip code level data and a bunch of other stuff, that frankly doesn't exist in politics. And that's really important, because effect sizes in politics have gotten smaller and smaller and smaller, and --

Julia: By effect sizes, you mean like, how much does one particular ad campaign budge the overall vote?

David: How much does an ad campaign budge the vote, how much does the good candidate move things around...

Just to put numbers on this, in 2012, which was not that long ago, the correlation between Democratic vote share in the Senate and Democratic vote share in the presidency, state by state was about 0.71 or something. And so there was an enormous amount of tickets flooding. It was really possible for a very charismatic person to go on and pick good ads and run on the right platform and then distinguish themselves from the party.

Flash forward to 2020, that correlation was 0.954. It's really changed a lot. I think it's one of the most underrated things about politics, is just how much less tickets splitting there is now than there used to be.

And there's I think some plausible quasi experimental evidence that this has been tied to stuff like broadband roll-out and 3G roll-out, the decline of local newspapers... but there's just been this it's harder and harder to persuade people because there are fewer swing voters.

And so it's actually a problem that's a lot like what you see in some of the online ad tech literature, where you might have a lot of interventions that are worth doing -- our best guess right now is that if you show someone 100 ads in the week before the election, it'll increase their chance of voting for you by maybe like 1% to one and a half percent. And ads cost like $30 per thousand. That's very cost-effective, it's a good idea. But it makes measurement very challenging.

And that's something I like to say is a positive thing about this older generation of politicians. When I first started in 2012, I was 20 and I was like, "Oh, I'm going to do all of this math and we're going to win elections." And I was with all these other nerds, we were in this cave. We really hated these old school consultants who had been in politics for like 20 years. What I think is interesting is that we really, and it just shows, it's not just about, "Oh, we need to follow the data." In politics, with this measurement problem, I think that the Obama people -- and I was part of this -- really chose easy to measure interventions, that we knew had very small effects, over harder to test things.

Julia: What's an example?

David: An easy to test thing is canvassing because whether or not you vote is a matter of public record. So, you knock on 100,000 doors, you don't knock on 100,000 doors. You randomize. It's all very clean. And then you can show that you raise someone's chance of voting by like three or four tenths of a percent. And it's statistically significant because you looked at so many people.

But if you multiply it out, if you knock every single door maybe you raise vote share by six or seven hundredths of a percent. It's not really a very big deal.

But if you look at stuff like television ads, it's very hard to test. Just because it's very hard to do individual level experiments, you have to collect surveys, it becomes very expensive.

And then you have stuff like yard signs. And so what was really interesting was, over the Obama era, it was kind of starting in 2008, there was this massive expansion in canvassing operations, basically because of these like academic field experiments showing that it works. It created this kind of Taylorism where there were these volunteers who'd show up and they'd say, "Oh, I'd want a yard sign." And they wouldn't give them the yard signs, but they would instead try to make them canvas.

And then you flash forward, five or six years. Like in 2014, finally someone did a precinct level randomized experiment with yard signs. And it turns out that yard signs are probably an order of magnitude or two more cost-

effective -- honestly, between two to three is my 25 to 75 interval -- more effective than the canvassing. If I was running in a race, a congressional race, and I had a choice between 100 dedicated volunteers knocking on doors, and a yard sign in every intersection, I would pick the yard signs.

And so it goes to show that all of that stuff is hard. Sorry for the digression.

When I was in the Obama campaign, we had all these disagreements because the old school consultants were like, "You need to go up on TV, you need to focus on this.." And we really disagreed. I think going back, probably 80% of the disagreements I had with these old school consultants in 2012, looking back, I think they were right.

Julia: Really?

David: There were a lot of things... and I'll talk about why. There is a reason I brought it up.

Because I think that they came from this era, and I think Joe Biden is one of these politicians, where in the 1980s there were way more swing voters -- and this is measurable in terms of percentage of the people who identify as independent, percentage of people who ticket split -- than there are now. An enormous number more.

And so as a result, effect sizes were just much larger. You could do a poll and then run an ad campaign in one media market and not another. And then do another poll each of which with 300 people. And you would actually be powered to detect what works or what didn't. Or you could go out and give a speech, and there would be enough cross-pressured voters in that speech that some of them would yell at you and some of them wouldn't.

And so it was a totally different information environment, where it was truly possible to learn things. I think as a result, a lot of these people who came out in that era -- people like Joe Biden, some of these people like Chuck Schumer, people like these lesser-known consultants like Jeff Garren -- they actually have a very good intuitive model for what works and what's important and what's not.

Obviously, the world is different than it was in the 1980s, but a lot of things have kept the same and that's something I really had to grapple with.

And you know, some of it is that they weren't quantitatively trained. They would come to me and they would say something like, "Oh, when I ran this governor's race in 1996, we ran through this track or that. We ran positive

ads in these media markets and negative ads in these other media markets. And we ended up doing better here...”

And so from my vantage point for where that sits now, I remember hearing that and thinking, “That's crazy. That's not an experiment, that's just a story.” It turns out humans I think, can be good -- If there is actually a signal, then humans are actually okay at collecting repeated information and drawing some kind of inference. And so, that's something that, there's a real power there.

I think the problem is that now it's very, very difficult to measure what works or what doesn't. And that's something that I've spent a lot of time trying to change, but it is a really hard problem.

And so I think you have all of these very smart people working in politics, iterating without any kind of signal -- or good signal. The signals that they do get, the signals you do get in politics are: Is it something that was talked about? Was it picked up? Did it generate a lot of media attention? Did it help you fundraise? Did it help you get a lot of clicks or did it get a lot of views?

And the problem is that all of those signals are anti-correlated with persuasion, and this is a real problem. A lot of people who get into politics, they start in a Democratic primary, where I think it's a much better proxy. If you go and you put out a lot of content, the people who engage with content in a Democratic primary are the people who are most likely to vote. And they also are fairly persuadable because there's a lot of ideological similarity.

But in the context of a general election, the only people who interact with content are highly motivated individuals. And the people in the middle don't really do that at all. And so if you optimize your campaign based on what's getting the most Facebook likes, or what's getting shared the most, or what's helping you raise money, you're going to effectively target your campaign to highly liberal, highly educated people. Just to put some numbers, I think something like half of people who give to Democratic campaigns have an advanced degree, which is just wild. It's one of the most unrepresentative groups that you can really identify in a consumer file.

And I think that it's very hard on a day-to-day basis for you to say, “Well, I'm not going to put this message out there that generated all of this buzz and that helped us raise all this money because maybe it might not hypothetically helped swing voters.” You need to have some kind of metric.

And so I think that's part of the story, is that measurement is really hard and in the absence of high quality measurement, I think ideology seeps in, but --

Julia: Can I just clarify what you think the key takeaway is from your experience of arguing with the consultants and then looking back years later after the fact?

Is the takeaway like "My original approach to measurement and data analysis was naïve and there are more sophisticated and careful ways to use data and measurement?" Or is your takeaway more like "Our best approaches to data and measurement no longer seem to me to be as good as the intuitions of seasoned people who have a lot of experience in this field"?

David: I think it's not ... I don't think that we should trust people's intuitions in general. I think there's a clear story, which is that it used to be easy to measure things. And now it's hard to measure things. And these older people were alive back then, and that's why we should listen to them.

But I think in terms of my cognitive biases and where I was wrong, I came in and I remember my first day in the campaign my boss, he says, "Campaigns are all about lists. You have lists of people to persuade, lists of people to turn out to vote, lists of people to get to volunteer, lists of people to raise money from. And your job as a math person is to just sort those lists as well as possible."

And we would build all these predictive targeting models and we'd sort the lists. And so I just listened to that and I went and I sorted all of these lists.

I think the big flaw was that, stepping back, that's clearly crazy. Campaigns are about-

Julia: The little thing we forgot was that that is crazy!

David: It's clearly nuts. Hillary Clinton didn't lose because her lists weren't sorted well enough. I think big picture, Hillary Clinton lost because both the Trump and Clinton campaign decided to raise the salience of immigration, voters in the Midwest who are over-represented in the electoral college, agree with us on economic issues, but disagree with us on immigration, because both sides talked about it. The correlation of vote choice with immigration went up and then as a result the bias of the electoral college shot up and-

Julia: That is a great example, though, of the kind of thing that made me expect your view would be like:

"Data is still kind of underrated, relative to where it should be rated. There's still stuff that we can learn with reasonable confidence from data, like how popular or unpopular various issues are. And political campaigns, political leaders, are still under-weighting that information in their choices of how to campaign."

Is that not an accurate summary?

David: Well, I think the problem is that you have to make ... This argument I made, it sounds like a data-driven argument --

Julia: About immigration, you mean?

David: Right, about immigration. It sounds like a data-driven argument, but there are still a lot of leaps. I think you can put together... I think that if you've polled 50 people who work in data and 50 old school consultants in our industry ahead of 2016, I think the consultants would have been more likely to generate the story. Maybe they would have used somewhat different language.

           But I think that there's a, I guess you call it a, keys under the lampshade problem --

Julia: Lamplight, yeah. The idea for our listeners who haven't heard that expression, it's like a drunk person who's looking for their keys. And they're looking under the lamplight. And someone comes by and they're like, "Oh, you lost your keys. Is this where you lost them?" And the drunk says, "No, this isn't where I lost them, but this is where the light is, so that's where I'm looking."

David: Yeah. I think you can piece together an academic rigorous data-driven argument for the story I told, but I think that if you start with a mindset of, "I'm a data person and I'm going to do RCTs," I don't think you're going to get to there. I think that you'll end up focusing a lot on the vagaries of what kind of micro-targeting models you should use, or the effectiveness of different interventions.

           And I think that's just because it's a lot harder to ... Ads are the simplest or the most tractable of the messaging related things that you can test. When you say something like, "if you talk more about immigration, then you will lose with people..." it's a very fuzzy thing. It's not a well-defined intervention... you're going to go and talk on camera...

           And so I think that, the whole, I guess network of campaigns interfacing with journalists and then journalists creating narratives, and then those narratives going and influencing how people vote -- it's something that political scientists have studied and it's something that I pay a lot of

attention to, but it's something that's very hard to directly quantify in the same way as, if I send this piece of mail to this person, will generate this expected number of donations. I think that those two ways of thinking are different. I think that most people who just build predictive targeting models, aren't going to do the former. And I think that's part of the problem.

Julia: Would you say that the right synthesis of, for lack of a better word, data and theory, is to measure what you can and use that to inform your overall view -- so you can measure what voters' attitudes are on something like immigration, and then you have to combine that with other things into your theory of what issues should we be focusing on. But you're not going to get very far if you just say, "We shall only do things that randomized control trials have proved are useful"?

David: Yeah, I think that's right. I think you have to be really willing to make jumps in order -- I've only worked in politics, but I think this is true outside of politics, because most things aren't testable.

           I guess just to jump to the other piece to why I think this is hard -- and I think this is a much more rationalist-friendly theory of the phenomena --

Julia: Hey, rationalists would agree with you about the fact that RCTs are not the only thing you should rely on in forming your judgments!

David: Oh, absolutely. I just mean that when rationalists are like, "Why are people doing this?" and you're like, "Ah, because people are just kind of dumb," that's not an answer they like. Normally you're supposed to give a better reason for why the incentives are what they are.

           I think there are some internal incentive stories in the last thing I told. But I think the second piece, which I think is more incentive friendly, just gets to this collective action problem that comes from this change in correlation that I talked about --

Julia: Where the change in correlation is, it used to be that individual politicians could succeed even when the presidential candidate in their party didn't, and now it's basically just, everyone votes all Democrat or all Republican?

David: That's exactly right. This old world, where voters really had a lot of information about all these different candidates and really judged every individual candidate on the basis of what they said and what policies they took -- that's a very incentive compatible world. In that world, every single person up and down the ballot has a really strong incentive to try very hard to talk about popular things, and win, and all of this other stuff.

But now, we live in this world where everyone in the Democratic Party and really everyone in the progressive movement, and so this includes a lot of people who don't think of themselves as party actors at all. Not even AOC. I'm talking about liberal journalists at Vox, activists who are out in the streets... They'll tell you all the time, "Maybe Joe Biden should talk about healthcare, but that's his job to talk about healthcare. It's my job to push the Overton window and whatever."

And I think that used to be true when these correlations were a lot lower, but now you really need all of these different groups to coordinate with each other on message discipline in order to win.

And that's -- coordination's a very hard thing to do. People have very strong incentives to defect. If you're an activist going out and saying a very controversial thing, putting it out there in the most controversial, least favorable light so that you get a lot of negative attention. That's mostly good for you. That's how you get attention. It helps your career. It's how you get foundation money.

In the same way, if you're a congressperson in a very liberal city, and you're trying to build a national profile, the way that you raise money, the way that you get media attention, all comes from embracing unpopular things.

I think something that gets at this question that you were talking about is: In the primary we were working with all of the different presidential candidates at once. We were kind of providing some common infrastructure, which was very awkward.

And we really noticed that all of these campaigns, other than, I guess, Joe Biden, were embracing these really unpopular things. Not just stuff around immigration, but something like half the candidates who ran for president endorsed reparations, which would have been unthinkable, it would have been like a subject of a joke four years ago. And so we were trying to figure out, why did that happen?

In the beginning, we told this story of, maybe it's popular in the Democratic primary, but it's unpopular in the general, and so it's like an incentive issue.

But we went and we tested these things. It turns out these unpopular issues were also bad in the primary. The median primary voter is like 58 years old. Probably the modal primary voter is a 58-year-old black woman. And they're not super interested in a lot of these radical sweeping policies that are out there.

And so the question was, "Why was this happening?" I think the answer was that there was this pipeline of pushing out something that was controversial and getting a ton of attention on Twitter. The people who work at news stations -- because old people watch a lot of TV -- read Twitter, because the people who run MSNBC are all 28-year-olds. And then that leads to bookings.

And so that was the strategy that was going on. And it just shows that there are these incredible incentives to defect.

Julia: Just focusing on the goals of that particular politician in the liberal city, do you think it was overall rational for them to take unpopular positions, and potentially lose votes in a primary, in exchange for the attention? Or were they making a mistake, even relative to their own goals?

David: I think in a presidential election, I don't think it's a surprise that Joe Biden ended up winning. So I think that they ended up making the wrong choice in that case. But I think that looking out, a lot of individual actors really have a lot of incentive to stray from this "only do popular things and have a lot of message discipline."

And I do think that if you look at the people who have the strongest incentive, the people on the Biden campaign, the people who were literally running for Senate, I think that they show a lot of ideological and message discipline, relative to other actors in the party. Joe Biden was very forceful that he doesn't support defunding the police. Warnock just had an ad where it was just literally him and like 30 police officers saying that they like Raphael Warnock and that he likes the police. And so I think that-

Julia: And they didn't suffer from the, as you put it, defections from message discipline, from other Democratic politicians?

David: I mean, I think they did. I think Joe Biden did suffer. I think that House Democrats did suffer from this lack of message discipline. When we went and we polled people, and some of this is just a matter of factual information, but something like 44% of independent voters think that Joe Biden supports defunding the police.

But even outside of the information, I think that voters right now, when they see a liberal share something that they think is crazy, and maybe it doesn't have to be a Joe Biden clip, it could be just a New York Times op ed, they won't say, "Wow, this writer is crazy." I think they relatively correctly group the entire movement into this one big blob and say, "This whole group of people is crazy."

Julia: Why do you say that's "relatively correct" for them to do?

David: I think as someone who works in the industry, I think the reality is that people who work in politics are all very left-wing. And I think that all of these politicians themselves are actually, the vast majority of them, I think are much more liberal. Even the ones who claim to be moderate, I think most of them are actually all very liberal.

You don't work in politics unless you're extremely liberal. It doesn't pay very well relative to what else you could do with that level of human capital. The hours are long. It's very stressful. And so it turns out people who do it are all genuinely pretty liberal. Personally, my old team at Civis, I think a solid third of them were DSA members and it's not-

Julia: Democratic Socialists of America?

David: That's right. And there was one person who was to the left of the DSA.

So I think that voters are right. To be clear, I think that they should vote for Democrats, but if they see the liberal fringes pushing a policy that they think is crazy, it's a very reasonable thing I think for them to see it all as one big machine because it is actually one big machine.

Julia: You're saying lack of message discipline does hurt roughly all the politicians, but if they try they can mitigate some of that harm by actively, explicitly distancing themselves from the unpopular policies, like defund the police?

David: They can, but only partially. And so just to give one example, is that I think that there's a lot of signs that point to defund and socialism together playing a big role in the very large drop in support among Hispanic voters that happened this cycle.

It's a little hard because the polls were wrong. If you look at the precinct level election results, it looks like we fell by something like 11% to 12%, potentially more. And I think if you look at surveys, there are a bunch of reasons to think that it's tied to those two issues, but something that's really interesting about this drop, is that it wasn't just Biden. The drop among House Democrats was actually larger than the drop for Biden.

And so I think you can draw this causal arrow of this change not being related to Biden or Trump, but this change really being about a change in party ID, that these Hispanic voters saw the Democratic brand as tied to socialism or tied to defunding the police. And then they changed their partisanship, but because Biden distanced himself, they still had some residual that voted for Biden. I think if you take this total drop, I think among House Democrats it was like 14 points relative to the last time, this residual Biden outperformed them by about 2% or 3%. So even if you distance yourself, you still lose most of it.

And so that highlights this collective action problem of even these politicians, even if they have maintained this message discipline, unless a bunch of other people also do it, they're still mostly screwed.

Julia: So, whenever I see a problem of conflicting incentives, or a coordination problem, I always want to find some way to... isn't there some bargaining that can happen, such that everyone can coordinate? And so I'm just wondering, isn't there something moderate presidential candidates can offer to the more extreme liberal Democratic Congress people, in safe liberal seats, that makes it worth it to them to not publicize the most extreme unpopular ideas?

Or have you thought of any strategic ways to make message unity more possible for Democrats?

David: Yeah, no, absolutely. I think there are a couple of concrete things.

I think one very legitimate criticism of, say, House leadership -- and I don't want to overstate the importance, but I think it's symbolic of some other things -- is that House leadership has been in charge for 15 years now. And I think that there's a real phenomenon that you saw from multiple ambitious members of the house, whether it's Kennedy Jr, or whether it's van Hollen, I think there was... that they correctly figured out, "If I stay in the house, there is no chance that I will ever be in leadership." Just because there really hasn't been enough churn.

And I think in the same way, if you tell AOC, "Hey, [if you] don't talk about this defund the police stuff and play your cards right, then you could be in a leadership position someday" -- that's just clearly not true.

And so I do very much agree with you, that there are a variety of positive-sum deals that could be made to help these groups coordinate with each other.

Julia: That's the phrase I was looking for, thank you.

David: Yeah. There very much are, but I think a big problem over the last, I guess four years is that there's really not been a ton of inter-factional coordination, partly because the factions are all fighting with each other. I think hopefully partly because there wasn't a natural Schelling point.

I think that now, if you have a Democratic president, it is very natural for that Democratic president to be the person who brings everyone into a room and comes up with deals. And I think in the absence of that, it can be very hard. So I'm hopeful that that ends up making a difference.

But there are a lot of examples of coordination problems that really harmed the Democratic Party. One of my favorite examples, just because it's so blatant, is California has a "top two" election runoff system where a bunch of people run and then whoever gets to the top two then advances.

And in 2018, there were multiple races where there were five or six Democrats running and two Republicans. And so we came extremely close -- I think in one race, the difference was less than 100 votes -- to the two Republicans being the top two vote getters, and then us being totally shut out of the House.

And that is such a solvable problem. It's such a solvable problem. You just need to get Nancy Pelosi and Bernie Sanders and Warren and Obama and maybe there's two other people, and you need to get them all in a room. And they all need to be like, "All right, this is what we're going to do. We'll commission some big poll or whatever, or you'll get this one and you'll get that one." There's like a lot of deals you could make, and largely speaking, they haven't been made.

Just to give another example, we spent hundreds of millions of dollars on this Democratic primary that just happened, and that's money that could have been spent in the general election. And it's not just the money, there's very strong political science evidence that long protracted drawn-out primaries decrease support. There's a great causal identification strategy, because there are these states that have runoffs in the primary. And so you can compare what happens when you just miss having a runoff versus just get it. And it's actually very large impacts in the general.

And so other political parties in other countries, they create spending limits, they do a bunch of things to shorten the primary period. And these are all things that we could do that would be good for the party. But it hasn't been done, I think because there hasn't been much of an engine.

I do think that the basic problem is that there isn't a natural leader or Schelling point. If you have a situation where you have three people whose fates are all linked, but they're all also trying to take over the Democratic Party, I think the first person to come and say, "Oh, let's all come together", that's kind of a threat.

I also think a lot of the focus is on trying to tear everyone else down. Collective action problems are hard. I am hopeful that now that there is a president, Joe Biden, that it'll be easier. I do think that these kinds of conflicts were less common when Obama was president, but it just kind of shows if you want positive-sum coordination to happen, you need to have one person who's the natural gathering point. But I agree with you.

And one other thing I'll say, is that I see in my job personally, I think that the most impact I've ever had was in using technology as a smoke screen, to help groups coordinate with each other.

And just one trivial example of that was in 2018, there was this problem, that there was like 100 different groups, and they all want to spend money in the House of Representatives. And the natural thing that will happen is that then everyone will just put their money in the closest districts. And then we'll be saturated there and then there won't be stuff in other districts.

And normally there was this highly political process of trying to figure out who goes to where. And we built a simple web app where we had these election forecasts, and then basically when they came in, we would show all the districts rank ordered by need, for spend, by different interventions, by whether it's male or whatever. And then that would guide them toward, "All right. Well, I guess I'll put this money in the place that has the most need."

And it's funny because I think our forecasts were very good, but our forecast being very good was just a smoke screen. Because previously all of these different places had their own targeting departments and it was all this very high status thing. Instead we were able to go to people and say, "Oh, we have this thing. It's so much better. You should all just go in and use this app." And it was really the coordination that provided the gains, not the forecasting being better, though it was better, but that wasn't really the point. The point was the coordination.

In the same way, I think that when you're looking at message discipline, a lot of the stuff that we've done of just centralizing testing and providing the same talking points to everyone, it's more important to get everyone to use the same talking points than it is for those talking points to be the best versus the second best or the third best. And so, I think it's just an interesting thing that we claim that we're solving machine learning problems, but we're really solving coordination ones.

Julia: That's very interesting and well put.

I wanted to ask you about a different kind of coordination problem. You've talked elsewhere about how Democratic politicians are in a bind because their donors are more liberal, whereas their voting base is more moderate. And so they have this pressure to lean left to appeal to the donors, but then this costs them votes with the moderate electorate.

And I was just wondering, is that really a bind? Is that a genuine coordination problem? Or could Democratic politicians just choose to

appeal to the moderate voters over the liberal donors, without suffering all that much in the way of lost donations or anything like that?

Are they being irrational by catering relatively more to their donors than their voting base?

David: It's a good question. And I don't want to focus too much on the donations themselves. Money does help you buy elections, but I think that it's better to be more moderate and have less money than to do the reverse.

Julia: That's what I was thinking.

David: I think that the mechanical problem is that if you run and don't cater to the people who are disproportionately powerful in your primary electorate, then you won't get media attention and you might not win the primary.

And I think that this is why I like to look at donations as just like one lever. In the political science literature or in the representation literature, people talk about policy responsiveness and how educated people just get listened to more than uneducated people. The details of this can get very controversial, but there are all these regressions where they say, "Oh, whenever the top 10% of income disagrees with the median voter, they get their way on policy maybe 80% of the time."

And people can argue about these things and people can also argue about whether that's good or bad. But I think that there is a real sense in which highly educated people just have a really disproportionate influence on things. They run every organization in the world, that's just kind of how organizations work. They're a lot more likely to give money. They consume the most news and that gives them just a lot of market power in terms of what does MSNBC decide to cover. It's not just that these groups have the highest TV viewership, but it's also that it's the group that TV advertisers want the most.

I had a really depressing conversation with one journalist who told me that at some point he worked at, I think it was Yahoo News. And he wrote these very policy-driven articles about how different candidates' tax plans would affect your finances. And what was interesting is it's not that those stories didn't get a lot of clicks. They actually got a reasonable amount of clicks. It's, they got the wrong clicks, because it was like poor working class people or middle-class people. And what you really want are the richest people. And those are the people who care the most about politics and care the most about the horse race.

If you look like, why is it that Vox can get any reasonable CPM or why is it that these podcasts can get, I don't know about this one, but can get

reasonable advertising revenue? And the answer is because they have highly affluent viewership. And so that's worth something.

Then it's also, there are other sources of educated people having more power. They're a lot more likely to run for office. They're much more likely to staff campaigns. They're much more likely to volunteer. And so there's this big gravitational pull toward listening to what highly educated liberal people in the party want. And I think it goes through incentives.

It also just shows up socially. One example I mentioned in one of my interviews is, the Hyde Amendment, which is about federal funding for reproductive services. The government's not allowed to provide any sort of subsidy for abortions. And it's a super popular thing. And I think something like 60% of the population supports the Hyde Amendment. Joe Biden, even though he's pro-choice, I think he has a history of maintaining kind of a Catholic branding, safe, legal barrier, et cetera. And he was against the Hyde Amendment.

And so then basically when the issue came up in the 2020 primary, he was initially silent on it. And then there was an internal staff revolt. Then kind of unsurprisingly, he had to come out against the Hyde Amendment.

I think it's very hard to not cater to these views. It generates risk of internal backlash, of social opprobrium. It makes it harder for you to get TV coverage. And I think that Joe Biden was able to overcome that in the primary, because he was the vice-president. And so a bunch of people knew who he was. But otherwise it can be hard.

Julia: So, then would it be accurate to say that the kind of liberal bias or slant of the media is a double-edged sword for Democrats -- because on the one hand it helps them, obviously, but on the other hand, it creates this tough bind for them, where in order to play nice with the media and get the coverage and so on, they have to go farther left than their electorate actually wants?

David: I think that's absolutely true.

Julia: And would that not apply nearly as much to Republicans? Is there an asymmetry there?

David: There is actually a real asymmetry here, which I think is interesting. Which is on, say, immigration, both the Democratic and Republican Party are staffed by these highly educated people, and their donors are also disproportionately educated. And so that pushes Democrats away from the median voter. If you compare the median voter to the median Democratic donor, they are way to the left on cosmopolitan loaded issues.

And that's true for Republicans too, but that bias pushes them toward the center because geometrically, if you start right of center and you get pushed leftward on immigration, that makes you more normal. And so, that's a real asymmetry that exists between the parties.

There are other problems that they face, like the median Republican donor is to the right of the median Republican on economic issues. Just like on the left, the median donor is to the left of the median Democrat -- though not by as much. The gap on economic issues is much larger on the Republican side.

Republicans would win a lot more elections if they were more moderate on economic issues. A big part of why Donald Trump won in 2016 was that he voiced a much more moderate stance on economic issues, insisted that he didn't want to cut entitlements. As a result, he was actually rated as one of the most moderate people to ever run for president. This is something that people don't realize. In 2016, people really did rate Donald Trump as a fairly moderate person relative to any other Republican politicians.

And so that is a big challenge for them. There's almost a mirror issue where our social issues are kind of our baggage and their economic positions are their baggage.

Then I'd say the one other big asymmetry between the Democratic and Republican Party is that there are very strong structural biases in our electoral system that make it so that Republicans can consistently wield power with 48% of the vote. That's something I like to say is, if we were the Republican Party, I think that this would all be fine.

I think that the Republican Party really legitimately is in a world where they can do unpopular things. They can say unpopular things and then just wait for a recession to have a big governing majority and do what they want, but that doesn't work on the Democratic side, because due to the nature of our current coalition we would need to get something like 53% or 54% of the vote for three cycles in a row in order to take the Senate. And that's very hard.

Julia: So, zooming out, your basic model of how Democrats claw back some more electoral victories in the coming years is: Message unity, focus on the popular policies, don't talk so much about the unpopular policies.

What's like one or two of the main alternate theories that people have, that are different from yours, about how the Democrats can succeed going forward? And why do you think you disagree with those people?

David: Yeah, I think there's two broad themes.

The first is I think this empirically inaccurate view of voter mobilization. This idea that we can go through and win elections, not by persuading people, but by inspiring more people to vote.

And I think that it's not a crazy thing on its face. As I said earlier, there are fewer and fewer swing voters in every single election. And so, it stands to reason that, well, then maybe we shouldn't be focusing on these swing voters maybe we should just be trying to turn people out. There's a lot of people who don't vote.

And I think there's three core problems with this thesis.

The first is that just fundamentally getting someone to change their vote from Republican to Democrat nets you twice as many votes as getting someone to go from non-voting to voting.

I think the second problem with it is that none of these interventions actually work very well.

Julia: That should maybe be problem number one.

David: It is a very big problem. Actually, none of these turnout interventions actually work very well. There are groups in the Democratic Party that actually tried to estimate the cost per vote of various interventions. And television is roughly around $200, it gets a little higher or lower, but somewhere in that range.

And canvassing is something like 2 to $3,000. It just turns out that having a stranger knock on your door and telling them to vote is just not a very effective intervention. People who don't vote don't care a lot about politics.

Which brings you to the next problem, which is that really non-voters are not particularly left-wing as a group. Even if you restrict to people who didn't vote in 2016 but would have voted for Clinton, only 23% of those people identify as liberal. Most of them identify as not-

Julia: Why can't you just focus your attention on the non-voters who seem most likely to vote for your party, if they did vote? Don't we have enough demographic info to make some decent guesses about that?

David: I think the issue is that people as a group, in general, ideological messaging does not increase turnout. There have been an enormous amount of RCTs within the party where we try sending mail to people. And mail that mentions partisan issues or highly ideological issues generally either doesn't work or decreases turnout.

The most effective turnout interventions that we have are reminding people that there's an election. There's this thing called social pressure mail, which is a little bit creepy, where you mail them their voter report card of what elections they voted in. And then you tell them, "Your vote is public record. And after the election, we're going to tell everyone whether you voted or not."

Julia: Does that actually work? I feel like that would backfire on me, and I'm someone who wants to vote.

David: Yeah. I mean, maybe it makes people want to vote for Republicans. I don't know. But it definitely, in terms of turnout, it's one of the most effective turnout interventions that are out there, for what it's worth.

But all of the ideological stuff, it just doesn't work. And I think there's this reason for that, which is that if you were a highly ideologically motivated person, you would already be a partisan Democrat who votes a lot. And I think that's one of the core problems.

And then I think the second big critique is just this idea that the way the Democratic Party right now is built around college educated people, young people, non-white people. And people will say this is the coalition of the future. The college-educated share of the electorate keeps going up every year, the secular share of the electorate keeps going up every year.

And these changes are fast. I think it's something like 1% per year or maybe a little bit less, but it's actually, the country is getting more educated very quickly and that trend has not slowed down. I used to worry maybe this increase in educational attainment was due to the Flynn effect and the Flynn effect is narrowed out. But actually, it's kept going up over the last decade.

And so, I think there's a sense in which our coalition will be a coalition that could win in the 2030s or something. But I think this gets to this... And so, there's this idea that trying to go back and move the clock backward and appeal to people with more retrograde views is dirtier and less progressive. I think that there's a real morality in a lot of progressive circles, that trying to mobilize people is good and trying to persuade people who disagree with you can be bad.

And I think the big point for me is just the mechanics of how biased our institutions are against us. In 2016, the Electoral College was at the most biased it had been in, I think, 60 years. Hillary Clinton got 51.1% of the two-party vote and lost. And she would have needed 51.6% in order to win. And it actually got worse this cycle. I think Joe Biden got about 52.3% of the two-party vote. And if he had gotten 52%, he would've lost.

And so, in order for us to win the presidency, we have to persistently win by five points again and again, and that just isn't going to happen most of the time. And then if you look at the Senate, the U.S Senate, because college educated people are so much less likely to live in rural areas, and rural areas are overrepresented in the Senate, the Senate is much worse than the Electoral College.

I think an example of this is in 2018, we had a wave democratic year, I think we got 54% of the vote. And we lost two senate seats, and we came very close to losing two others. If we had had that in a neutral year, in a presidential year, we would have lost eight or nine seats.

And so, I think the current coalition, even if it's very morally satisfying, if we lived in Austria or something with proportional representation it would be fine, but right now we really do have this incompatibility with power with the current nature of how we're doing things.

And I think it's a really interesting question because up until now there wasn't that much of an incentive to push back against this kind of education polarization, because it wasn't electorally harming us. I think it's interesting just to dwell on that for a second. With the Electoral College, education polarization in 2012 actually benefited Democrats, because we had just enough of the non-college white votes so that the Midwestern States were reasonably democratic, but we had enough college educated voters that we were able to win states like Colorado and Virginia.

And so, we actually had, I think, about... The Electoral College was actually biased in the Democrat's favor by about half a point. And on the Senate, the Senate was biased in strict terms against Democrats. But because the correlation between presidential vote and Senate vote was so much lower, it just didn't matter very much. In 2012, for example, we won Senate seats in places like North Dakota and Indiana and Missouri that Obama lost by double digits.

But now that ticket splitting is so much lower. And the dynamics in the Electoral College are different. We don't really have a choice but to go in the... I mean, the choices are we can not be in a position to legislatively pass laws for potentially a long time, or we can moderate and try to appeal to people who disagree with our values in a lot of core ways and be in a position to win these elections.

And I think that people underestimate, I think, the strength of that, but I think it's going to be just a very interesting question. Like will the Democratic Party respond to these incentives by pushing back against the educated component of their party or will they not? And I think it's an interesting question.

Julia: Okay. I have a new, probably terrible idea for how to help the Democrats win. How about political campaigns for Democrats don't let anyone work for them who is ideologically enthusiastic about liberal values? And instead, they just use their money donations to pay really high salaries to people who are in it for the money. And maybe they'll get a huge bonus if the campaign wins or something.

But then they'll at least have clear eyes and they can think strategically about which messaging is actually going to work. And it won't be tainted or they won't be so conflicted by their ideological principles.

How do you like my plan?

David: It's not the craziest thing in the world. I think that one of the big reasons why I think I'm so against field and canvassing operations is that it's very labor-intensive. And because it's so labor-intensive, it really pushes campaigns to hire lots of very young people who are getting paid way below market salaries.

And I think it would be better if we had more older people working in politics. It's hard to not have people who don't have college degrees. And so, there is an issue that the people who you bring in, whether they're from McKinsey or whatever, they're still going to be highly educated and that will seep into their politics. But I think it's going to be better to try to bring in more diversity.

I think the other point is normal diversity and inclusion. I think that a great boon for the Democratic Party is that we still have an enormous number of working class people in our party who share values with the median voter in terms of being religious and in terms of not having moderate views on social issues. It's just that most of them aren't white.

And so, that I think it gets me to this point where at this point I want us to run as many non-white candidates as we can. And I think this shows itself, just empirically, in Georgia right now. Warnock, who's an African-American pastor who talks about faith all the time, is doing a lot better in polls than Jon Ossoff, who is, I think a 33 year old Georgetown grad or it might be GW grad, who's pretty liberal and has tweets about legalize it and whatever.

And I think that, just to go on John Ossoff again, if you look at what Democrat outperformed fundamentals the most in 2020, I think that Lucy McBath who represents Georgia's 6th in the Atlanta suburbs, it's a race that Jon Ossoff ran in and got 47% of the vote. And then Lucy McBath who's African-American ran after him in 2018 and won by about a point. And then this time won by even more.

And so, I think there's just a lot of evidence that picking messengers in our party, who say that they believe in God, who talk about things in a normal way, is really beneficial. And I think in practice, the way to do that is to elevate more non-white people, and particularly non-white people from these historic institutions. There are hundreds of black elected officials.

And I think that for a long time there was this idea that you want to run a white candidate rather than a black candidate because of racism. And I think that ironically we've reached the point where white liberals are so culturally-separated from working class white people that it's better to run nonwhite candidates just because they're less weird.

And the last thing I'll say on that is, I think that Barack Obama, he presided over one of the only periods of education depolarization in history. He did better in relative terms with working class white voters than John Kerry did. And I think part of the reason he did that was that as I think a black politician, him and the people around him were very, very conscious of the need to placate culturally conservative white voters.

In the Obama campaign, there was a question: Is this going to piss off any conservative white people? And if it was, they usually wouldn't do it. And so, they focused on these broadly popular things. And I think they did it because they thought they needed to because the president was black.

And I think that there was this idea for Hillary Clinton that because she was a white person, that she could go out and embrace a lot of the stuff that Obama wouldn't have. And I think the answer is that she couldn't. We're in this postmodern world where a woke, white person is worse than a normal black person.

Julia: There's a point I've seen you make, and it really struck me as a great point:

That all of these explanations that people have for why the working class in the U.S has trended rightward over the last few decades... They tend to be very U.S-centric. But that doesn't actually make that much sense, because that same trend of the working class moving rightward can be observed in lots of different countries as well.

And so, the best explanation of that data is probably not going to be U.S-centric. Could you talk just a little bit about what you think is a more plausible candidate explanation for the working-class moving right?

David: Yeah, it's a great question. The thing that really struck me -- because I used to tell all of these stories. Because I think as a leftist, you say: In the past we had labor unions and things were good and now we have neo-liberalism and things are bad, where did things go wrong? And it's really easy to construct these narratives around where things went wrong. Maybe

it was Carter not abandoning the unions or maybe it was the Goldwater babies, or maybe it was Bill Clinton or maybe it was the Atari Democrats.

And you can construct this whole thing, but then we read about foreign politics, whether it's Tony Blair or whether it's Germany... I think the thing that really got me was I was reading about Greek politics and some article in the two thousands was talking about how their socialist party lost because of losses in their traditional working class strongholds. And I was like, "Okay, there's something global going on here."

And I think for me, the big thing is the education levels are so much higher than they used to be. And I think this is a really under-appreciated point about the developed world. When you go back to the immediate post-war era, like 1948, something like 4% of the electorate had a college degree. And if you go to now, that number is closer to 38% or 40%.

And in the plurality education category: 80% of people in the forties had not graduated from high school and now less than 8% of people of the electorate hasn't graduated from high school. And so, we're just so much more educated than we were before.

And I think that you can tell the story that even though in the 1940s only 4% of people had a college degree, the world was still run by highly educated people in both parties. But they knew that if they campaigned on these cosmopolitan-loaded issues that they cared about, that they would lose elections.

And I think 1972 was a lot like that. It's really funny. If you do a county-level scatterplot or whatever, the 1972 presidential election was very similar to the 2016 election. Democrats doing very badly in these places with a lot of working class voters, doing very well with professionals. It's just that the demographics were different. And so that translated into a massive landslide for Republicans.

And so, there was this real need for ideological discipline. But I think that as the country got more educated, it really became possible to campaign on these values that the people who ran the center left believed in. And maybe you wouldn't win a national election, but you could win a mayoral election in a very liberal city, you could win a democratic primary and maybe you could win the general if you were restrained enough and there was a recession at your back.

And I think in terms of why things are splitting this way, I think it would have been... rather than blame politicians, I think there are these very large divides between college educated voters and non-college educated voters in terms of attitudes toward race, in terms of attitudes towards gender, in terms of lived experiences.

And I think that politics is fundamentally about dividing the country in half. This is the critique that, I don't know, Chinese intellectuals would make about American democracy. Basically your opposition party has this incentive to manufacture dissent where it previously wouldn't exist. And I think it's true. Democracy has some other upsides, but it's a very real critique.

So, I think it's not surprising that the political system here and everywhere else in the developed world responded to this split.

And like in 2016, something I really like to say is that it would be really ideologically convenient to say the reason why we lost all these working class white voters was because the Democratic Party pushed free trade and de-industrialization and neo-liberalism and these people were responding to the material conditions.

And that's a good line. It's a good narrative. It's what I would claim if I was on television. I don't know. If I was a politician, that's what I would say.

But I think the empirical case for materialism is really weak. It's definitely true that most of the Midwest really suffered large losses over Obama's term and I think over a 30 year period. There's like one county in Indiana where I think the share of the population that worked in manufacturing dropped by half. And I remember I visited this place and I met someone who used to work at factory and now he works at a chicken farm, he doesn't like working in a chicken farm.

But other parts of the country actually really benefited. Like in Eastern Iowa, the unemployment rate was 2%. And the reason is that they grow soybeans and they can export soybeans to China. So, they were actually doing very well. And I think there's similar places like the Grand Rapids suburbs, they manufactured furniture and they were able to export it.

And those places swung against Democrats just as much as the places that were really wracked by globalization. And if you do regressions, it's very, very hard to find any link between these material changes in conditions and how people voted. The reason people changed their votes were because of these values, whether it's racial, or resentment, or openness or whatever, it was cultural, it wasn't material.

And I think this shows in other ways too. Like in Spain, over the last 10 years, there's been this big rise in this party called Podemos that is very left wing kind of an activist movement driven thing.

And the other big center left party is the PSOE, which has its historical base among working class voters. And what you could see is that the voters most likely to vote for Podemos are highly educated people. If you look at

income, there's this great graph that shows that the people who make the most per month actually vote the most for Podemos.

And so, I think this gets to something you were asking way in the beginning which is, is it that voters are acting rationally and we spent the whole time talking about whether politicians were being rational. But when you look at voters, it's very clear that now voters in both coalitions are voting against their material self-interest in some way. whether it's rich people who are voting for socialists or whether it's poor people who are voting for people with right wing economics.

But I think that given that a bunch of people are doing it and given that both sides are doing it, it's probably rational in some sense. And I think it really gets to this idea that now we live in this post-materialist world where people are voting on values and what kind of world they want to live in. And that has a much bigger impact than whether they make 3% more or 2% less.

I think emotionally, the impact of Donald Trump winning on highly educated professionals was a lot bigger than if their taxes went up by 2% or 3%. And so, I think voters are being rational. It's just that what they're trying to do isn't the thing that policy wonks necessarily talk about.

Julia: Well, I'm glad you circled back to the question of "Are voters voting rationally?" because it's very interesting and I think it's a tricky thing to tease apart.

Once you allow that people can care about things other than their material interests, that they can care about the values that are upheld in the society where they live in, it becomes a little tricky to distinguish *rational voting,* with an intention to change the values of society, on the one hand, from *expressive voting*, where it's not that your vote is actually going to change anything, it just feels really good casting it. Like you feel like you're sticking it to the libs or to the conservatives when you cast your vote, or you feel like you're standing up for what you believe in or expressing your identity as a liberal or whatever. But it's not actually going to change anything about the way society functions even when we're just talking about the values that society runs on.

And so -- does that distinction make sense to you? And if so, do you feel like you have an intuition about whether voters are correctly trying to change the values of society or whether they're just voting expressively?

David: I'm glad you asked that. I think that the answer is that right now, there isn't much of a trade-off. Because in the U.S we have an enormous amount of veto points, whether it's the Senate or the filibuster, or... It's just incredibly hard for any laws to get passed in any real way in the U.S.

I think in Europe you have a similar story where they've seen an increase in party fractionalization over the last 30 years or so. And so, it used to be that, like in Germany, for example, the center left would get third, like the social Democratic Party would get 45% of the vote and they'd effectively be able to govern.

And now we're in a world where even if the center left wins, it's a coalition with a socially liberal party. And there's like six or seven people in the coalition.

And so, I think in both cases, you have a situation where it is possible to vote expressively and not face any material trade-offs.

Julia: Mm, I see.

David: And I think it's actually a source of a lot of dysfunction. I think that right now you can engage in a lot of cheap talk without facing any kind of electoral consequences. And I think that's bad for democratic accountability and incentives for everyone involved. It seems bad.

I think the thing that confirms this story is that when you look at Blue States and also Red States, they legislatively could pass single payer healthcare or raise taxes. And on the right, they could get rid of Medicaid or drastically cut taxes and cut schools.

And they mostly don't do this. And the reason is that voters don't like it.

Something I like to say is there's a Republican governor in Vermont, and there's a democratic governor in Kansas. And the reason for that is that Vermont tried to pass single payer healthcare after the governor won in 2010, and it was a huge disaster. The costs kept coming up and it looked like they were going to have to roughly double their state income taxes. And then they lost control of the state.

And in the same way in Kansas, the reason there's a democratic governor in Kansas right now is Governor Sam Brownback, he massively cut income taxes and also had pretty dramatic service cuts to schools. And as it turns out, that was very unpopular. And as a result he lost.

And so, obviously both elections were kind of close and partisanship pushes away from this. But I think that voters don't want radical change. And that's a real thing that I think the left and activists have to grapple with, which is, I personally want a lot of radical policy changes, but you can't present them that way. You want to present things as common sense, incremental changes in order to get public support because fundamentally the public is wary of change. Or, the median voter who's 50 years old is going to be wary of change.

And so, I think that shows that a lot of this is expressive. But I think that the reason why it's cheap to cast an expressive vote is that when you say that you support Elizabeth Warren, it's not that she's going to go and pass some massive wealth tax and really affect your wealth. That's not actually what's going to happen. If it did, then that would be a different story.

In the same way with Republicans, Donald Trump didn't pass giant welfare state cuts. And the one time he tried with the healthcare repeal, it led to a big drop in his polling among non-college whites.

And I think there's a second economic story, though I don't know anything about economics, but it's something that Yglesias talks about a lot. Which is basically that because we live in this world where interest rates are basically near zero, Republicans can basically give rich people lower taxes and also not cut social services and the math all works out.

But I think the sum total of all of this evidence is that given that New York City or San Francisco are not actually socially democratic utopias, I think the answer is it that a lot of this is expressive.

[musical interlude]

Julia: Well, we covered a lot of ground in that conversation and so before I wrap up this episode, I wanted to do my best to summarize for you guys what David's model of this topic is.

As you'll recall, I started out by asking whether Democratic politicians were being irrational about how to win elections. Are they making predictably bad decisions about the topics they focus on or the strategies they use to increase turnout and so on? David's answer broke things down into, I would say, three things that lead to bad decisions:

The first being ideological bias. The people who work on Democratic campaigns are much more educated, young, white, and definitely more ideologically driven and left wing than the median Democratic voter. And it's just apparently very hard for people to put aside those biases and just focus on what is going to appeal to the voters rather than what appeals to them.

The second is, I'll call it, measurement challenges. A lot of the time, what looks like irrationality is really just that the information people have is really murky and it's harder than it might seem to figure out what the best path is. As David said, a lot of the things that are easier to measure, like the effect of canvassing, aren't as important as the things that are hard to measure, like the effect of television coverage.

Then the third thing is coordination problems. People often talk about, "The Democrats did this," or, "The Democrats did that," as if the Democrats as a single entity, but that is not a very useful simplification a lot of the time, because there are lots of different entities under that umbrella with very different goals and incentives from each other. And a Democratic politician in a very liberal city has an incentive to focus on more extreme issues that get him media coverage, even though that might hurt another Democrat who's, say, running in the general election.

So three things, ideological bias, measurement challenges and coordination problems.

Then there are interactions between these three things, which I thought was a really interesting recurring theme of this conversation. For example, ideological biases and the measurement challenge interact, because, as David pointed out, the harder it is to clearly measure what works and what doesn't, the more room there is for your own ideological biases to creep in and guide your decision-making.

Then finally, there are a number of structural features of American politics we talked about that feed into these three problems and just make them all worse. Like, for example, the fact that people increasingly vote straight ticket, all Democrats or all Republicans -- which makes the measurement problem harder, and makes the coordination problem harder, because politicians are increasingly judged by what other politicians in their party say and do.

I hope that was somewhat helpful and not just more confusing. David Shor is just full of insightful analysis of politics and so if you enjoyed this episode, you should definitely follow him on Twitter. He's David Shor, that's D-A-V-I-D S-H-O-R. On the podcast website I'll link to a couple of other articles and interviews with David that I found really interesting as well.

That's all for this episode. I hope you'll join me next time for more explorations on the borderlands between reason and nonsense.