

The NBA Finals Are Here. Even Superforecasters Are Surprised. Nobody knew if the NBA bubble was going to work when the season restarted—so we asked people known for accurate forecasts of uncertain events

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FULL TEXT

When the NBA season restarted in July, nobody was sure that it would finish. Florida cases were rising. The bubble still felt like a concept ripped straight from science fiction. It was hard to be confident of anything while surrounded by so much uncertainty.

Could the league really isolate thousands of people in Disney World to play basketball through a pandemic?

"This isn't a sports question," said Bertalan Mesko, a medical futurist in Budapest. "It's a public health question."

The fate of the NBA season is not the sort of predicament that typically concerns health care prognosticators in Budapest, but it happened to catch Mesko's attention one day this summer when he was perusing a crowd forecasting site called Good Judgment Open .

Born from the pioneering research of Philip Tetlock, the author of "Superforecasting: The Art and Science of Prediction," Good Judgment Open allows people to predict the likelihood of future events. Will Apple be the most valuable publicly traded company in the world at the end of 2020? When will the Senate confirm Amy Coney Barrett to the Supreme Court? And will the NBA crown a champion this season?

That last one came from The Wall Street Journal. In early July, weeks before the first game of the restart and months before the Finals that begin on Wednesday, Good Judgment Open posed our NBA questions to aspiring professional superforecasters.

It turned out to be more of a success than most of them imagined.

By the time players entered the bubble without a coronavirus outbreak, the forecasters were confident the NBA season would restart. But they weren't convinced that the season would end with a champion. They were especially nervous about what might happen in between.

Even after the NBA season resumed on July 30, they expected the virus to penetrate the bubble: 75% of forecasts predicted there would be at least eight players who tested positive. That number ticked down to 50% by late August and fell below 25% for the first time in early September.

They initially felt that four scenarios—1 to 7 cases, 8 to 14 cases, 14 to 22 cases and 22 or more cases—were about equally likely. But since two players tested positive in the quarantine period, there have been zero reported cases inside the bubble. It's the most remarkable stat of this NBA season.

The forecasters adjusted their predictions accordingly. The bucket with the fewest cases became more likely than not on Aug. 21, when the consensus probability of mass cancellations was 1% and the chance of the NBA completing the season was 98%.

This wisdom of the crowd mirrored the thinking of people around the NBA. What began as skepticism turned into careful optimism and then acceptance of a surprising reality. Now they have made it to the Finals.

The shifting opinions also show what an unlikely success the bubble has been. It wasn't perfect. It required daily

testing and sequestering employees for months. It's probably not a sustainable model for other businesses. But in terms of protecting NBA teams from a destructive pathogen, it's a notable exception in the American struggle to contain the virus.

It was also a very public experiment in risk management.

"That lent it to being a pretty good forecasting question," said Warren Hatch, the CEO of Good Judgment Inc. "We try to quantify as much of the uncertainty as possible."

The Good Judgment Project began as a study funded by the U.S. government and ended with an extraordinarily counterintuitive finding : The amateurs trounced the experts in their forecasting ability.

"We now know a few hundred ordinary people and some simple math can not only compete with professionals supported by a multibillion-dollar apparatus but also beat them," Tetlock wrote in his book.

His work showed that habits of judgment and decision-making were skills that could be improved just like shooting a 3-pointer. The Stephen Currys of this world are called superforecasters.

Good Judgment Open is the breeding ground for professional superforecasters, as the top 1% of participants on the public site are tapped to make predictions for the company's paying clients. What sets them apart is a willingness to change their minds. This inclination to update their beliefs in the presence of new information is a trait that Tetlock described as "perpetual beta," and it's roughly three times as powerful a predictor of forecasting accuracy as someone's intelligence.

What superforecasters know is less important than how they think. Once you know how to think, you can think about anything—including an NBA season in a bubble.

It's hard to remember now how tenuous the premise of the NBA restart was. The bubble theory was still unproven, and the league preached caution, even after pouring hundreds of millions of dollars into a pop-up village that would be governed by hundreds of pages of health and safety guidelines. "This virus has humbled many," NBA commissioner Adam Silver said then. "I am not going to express any higher level of confidence than we are following the protocols, and we hope it works as we designed it."

But hundreds of amateur forecasters expressed their own levels of confidence. Bertalan Mesko was one of them. Since he normally specializes in health care forecasts on Good Judgment Open, the opportunity to dabble in basketball was appealing.

"The reason I love watching NBA games is that I'm not rooting for anyone," he said.

That is also how Mesko approached his NBA predictions. He came into this exercise without rooting interests, biases or anything resembling irrational exuberance. He studied the data and estimated the league's chances of restarting the season at 70%. He updated that initial projection two weeks later—and bumped the probability to 100%.

Fears of the virus faded as sports leagues settled into their bubbles, and slowly the aspiring superforecasters became more bullish about the NBA season.

It was a reminder that even the most improbable events are not impossible.

"Whether we are trying to spot and cultivate forecasting talent in finance or the CIA or the NBA, it is a long-haul process," Tetlock said in an email. "We can only assess the accuracy of probability judgments across many questions and across extended periods of time."

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