



6. Pollsters

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Pollsters

André Turcotte and Éric Grenier

The role of pollsters has evolved over the years. Although the main responsibilities continue to focus on providing and recording the voices of voters, technological advances have led to an increased level of sophistication in how the job is done. As a result of a shift from traditional polling to market intelligence, pollsters have become integrated within the daily strategic apparatus of a campaign. Their advice has shifted from the general and national to the narrow and local. Consequently, a new polling instrument – poll aggregators – is the latest innovation in this constantly evolving field.

Le rôle des sondeurs a évolué au fil des ans. Bien que leurs principales responsabilités soient toujours axées sur la mesure et la présentation des intentions de vote, les transformations technologiques ont permis une sophistication accrue des méthodes de travail. À la suite d'un passage des sondages traditionnels vers l'analyse de marché, les sondeurs se sont intégrés à l'appareil stratégique quotidien d'une campagne. Leurs conseils sont passés de généraux et nationaux à précis et locaux. Par conséquent, les agrégateurs de sondage constituent la plus récente innovation dans ce domaine en constante évolution.

IN A QUOTATION attributed – maybe apocryphally – to Albert Einstein, the scientist once told a young man to become a public opinion pollster. Einstein apparently suggested that the young man would never be unemployed as a pollster because tall tales rule people, and therefore rulers must always try to find out what they can get away with. One can find other negative references to pollsters. The origin of the term goes back to a book by Lindsay Rogers entitled *The Pollsters*, published in 1949.¹ It evoked Frederic Wakeman’s polemical work against modern advertising, *The Hucksters*, not a complimentary reference.² Despite unflattering comments, pollsters have emerged as very influential actors in the political process. In this chapter, we focus on political polling in general and political pollsters in particular, the individuals who provide public opinion data to political parties. However, it is difficult to avoid references to media pollsters – the individuals who provide public opinion data to the media – because the roles intersect, especially during election campaigns. This overlap occurred right from the inception of the field of public opinion research and occurs even more so in today’s twenty-four-hour mediated political environment.

How polling came to play such a prominent role in elections has been well documented. A then unknown university professor named George Gallup used his doctoral thesis on sampling techniques to help his mother-in-law become the first woman to hold the position of secretary of state in Iowa in 1932. Three years later Gallup, as well as Archibald Crossley and Elmo Roper, began conducting polls on a regular basis. Roper was the first of the media pollsters. In July 1935, he released the findings of a study of three thousand American adults about their attitudes toward a range of current affairs issues in *Fortune* magazine. He would repeat this exercise on a quarterly basis and discuss his findings under the rubric of “The *Fortune* Survey.”³ A few months later, in October 1935, Gallup started releasing his survey results in a weekly column entitled “America Speaks.”⁴ For his part, Crossley also developed a regular poll entitled “The Crossley Political Poll” for the newspapers of the Hearst Corporation.⁵ The first big test of this new way of measuring public opinion

came during the 1936 US presidential election. The young upstart Gallup publicly challenged the venerable *Literary Digest* and claimed that it would be unable to predict accurately the outcome of the election because of inherent flaws in its methodology. As it turned out, his own prediction in that election was off by 7 percent.⁶ However, unlike the *Literary Digest*, Gallup correctly predicted Roosevelt's victory, and with that the polling industry was born.

Although the details of the profession have evolved, the general job profile of a pollster has not changed much since the 1930s. On the surface, a pollster is the “neutral recorder” of the opinions of a particular population. The role of a pollster has been instrumental in entrenching the need to give citizens a voice and have them play a role in the political process in general and policy making in particular. As Gallup wrote in *The Pulse of Democracy*, “the kind of public opinion implied in the democratic ideal is tangible and dynamic. It springs from many sources in the day-to-day experience of individuals who constitute the political public, and who formulate these opinions as working guides for their political representatives.”⁷ This conceptualization of public opinion serves as a justification for using surveys and polls to measure it.⁸

The job has not changed much over the years. However, technological advances have led to an increased level of sophistication in how it is done. As the industry grew in size and influence, the best practitioners became perceived as “seers,” those with the ability to understand the general mood of an electorate.⁹ Then pollsters realized that, not only could they tell what people are thinking, but also they could provide advice on how to influence the way that people are thinking and, maybe more importantly, what they are thinking about. This realization had a significant impact on the duties of a pollster during an election campaign.

Duties in an Election Campaign

Through the influence of a second wave of pioneers – Richard Wirthlin, Peter Hart, Pat Caddell, and Allan Gregg, among others –

pollsters learned that not every voter is to be given equal attention and that a successful campaign needs to identify and consolidate its base of support and understand the relatively few voters who make a difference between winning and losing. This is generally described as an evolution from traditional polling to market intelligence. The campaign duties of a pollster are a reflection of this evolution.

This progression toward market intelligence is documented in the growing literature on political marketing. According to the main tenets of this discipline, market intelligence focuses on the behaviour of voters and how their needs, wants, attitudes, and priorities influence their behaviour.¹⁰ The discipline treats the electoral landscape as a political marketplace, essentially a forum in which buyers and sellers – or voters and candidates – have open entry and exit and competition exists to enable information to be extended to consumers (voters). The concept of a marketplace is well accepted in economics; however, it has been seen in negative terms in the field of voting behaviour. The main criticism is that opinion polling is incompatible with the rational exchange of arguments essential for a well-functioning democracy. Accordingly, a political marketplace influenced by opinion polling cheapens the act of voting and reduces it to a transaction between politicians with short-term goals and a fickle electorate.¹¹ Despite the criticism, it remains true that the practitioners of the political craft have adopted this conception of voting behaviour because it is very effective in providing a road map to electoral victory.

The key duties of pollsters during an election campaign start with an understanding that party strategists no longer look at the electorate homogeneously but adopt strategic segmentation techniques that allow for policies and communications to be designed for targeted groups. The time required to develop a thorough understanding of a segmented electorate means that, in many ways, the campaign duties of the pollster begin several months before the writ is dropped. Very early on in the pre-election–preparedness phase, the pollsters conduct large-scale benchmark polls to collect

data on every relevant aspect of the campaign, from issues to leaders' favourability and impression, messaging, and potential segments of the electorate likely to determine the outcome of the election. This polling is typically supplemented by focus groups. They are habitually used to deepen and refine the findings from the more robust quantitative phase. The results of the pre-election study are dissected by the senior leaders of the campaign and help in the development of the campaign strategy. At this stage, the pollster often becomes fully integrated into the command structure of the campaign and is part of every key discussion about both strategies and tactics. Contacts with the campaign evolve from several times a week before the writ is dropped to daily, if not several times a day, during the election campaign.

In line with these pre-campaign functions, the pollster spends time and resources to develop and refine the voter segments that will be the focus of the campaign efforts. Segmentation has become a key element of party polling. Market intelligence allows for the identification of very narrow segments of the electorate that make a difference between winning and losing an election. In specific terms, "segmentation tries to identify common characteristics. It helps to create new and more precise groupings and can help to provide new understanding where traditional political labels no longer apply or work effectively."¹² This approach is largely inspired by the ways in which business marketing campaigns are designed with a focus on potential consumers and represents a departure from the more sociological and anthropological parameters that dominated early voting research.

Once the writ is dropped, polling focuses solely on supporting execution of the campaign strategy. Although there can be adjustment and refinement, a realignment of strategy is ill-advised at this stage. Another key departure from previous practice is that the market intelligence function favours reliance on a more varied set of instruments to gather information. The accumulation of market intelligence now depends on more than surveys and polls and taps into the potential of other formal as well as informal means.

The campaign relies on a wide range of market intelligence tools to comprehend the campaign dynamics affecting the segmented electorate. More than before, the collection and interpretation of market intelligence data are multilayered. They range from ad hoc and unscientific data – such as canvasses, volunteer phone banks, and interactive voice response – to highly technical and mathematically sophisticated tools such as telephone and online campaign tracking polls, focus group testing, voter ID tracking programs, mathematical modelling, and data analytics. The responsibilities of the pollsters are not only to execute these multifaceted research designs but also, more importantly, to digest all this information and communicate the results to the campaign in a concrete and actionable way.

A major development in the duties of the pollster is that the commissioning of national polling during the campaign has become increasingly irrelevant because of this narrowly focused strategy based on segments of the electorate. Although this practice occurs partly because of changes in campaign financing legislation, political parties tend to focus their resources on battleground areas and rely on the numerous polls released almost daily by media outlets to get a sense of how the national campaign is evolving.¹³ They also use national polls to supplement their internal analyses.¹⁴ This new reality has added novel campaign duties for the party pollster, now required to navigate the interface between the media narrative influenced by the media pollsters and the internal narrative focused on narrow segments of the electorate. The last section of this chapter examines interactions among media polling, party polling, and media reporting, and it looks at how they contribute to framing the election campaign. Specifically, it shows how polling results affect media coverage as well as party leaders' activities and messages. This campaign dynamic leads to an interaction between public data and party data in a fight for capturing the public campaign narrative. The pollster is in the middle of this high-stakes drama.

Overcoming Obstacles

One of the consequences of the migration from traditional polling to market intelligence is the need for a reliable source for a national outlook of vote choice that can supplement the more granular party-based data. Poll aggregators have emerged to fill that need. Poll aggregation is not particularly new – “polls of polls” were compiled as early as the 1970s in the United Kingdom. However, they became particularly ubiquitous following the popularity of Nate Silver’s *FiveThirtyEight.com*, in which Silver used a statistical model based on polling and other factors to predict Barack Obama’s victory for the Democratic presidential nomination and subsequently the US presidential election in 2008. Aggregators have also existed in Canada for some time, Barry Kay’s work with the Laurier Institute for the Study of Public Opinion and Policy being one notable example. Aggregation became more widely cited beginning in the 2011 federal election, when some aggregators – including one of the authors – worked directly with media organizations.

The literature on this topic so far has focused on the development of poll aggregators.¹⁵ Little has been written on the mechanics of this practice and the rationale behind it. There are various methods used in poll aggregation. The basic concept is the same: an average of all voting-intention polls, with weights applied to each poll, often based on when the fieldwork was done, how many people were sampled, and a track record rating for the polling organization. Many overlook the weighting process and the judgment and evaluation that go into the development of the poll aggregators. Moreover, though party-based reasons exist for the emergence of poll aggregators, it is important to note that reduced newsroom budgets have made it more difficult for media organizations to afford commissioning individual surveys. The value of these surveys has been questioned because of the greater number of surveys being published, often self-commissioned by polling firms without a formal relationship with a media outlet, and the lack of certainty

that the commissioned polls will prove to be accurate, regardless of how much they cost. This torrent of polling information makes aggregations more digestible, both for the average news consumer and for journalists covering election campaigns. Perhaps more importantly, an average of polls has historically performed better than most individual polls. For instance, the Poll Tracker in 2019 accurately identified the probability of the Liberal victory, the likelihood of a minority government, and the party standings.

The impact of this emergence is still unfolding. Some polling firms have accepted – grudgingly or otherwise – this new reality and have cooperated with aggregators to make their data accessible and available, and they provide additional information when asked. Others have raised objections to the use of their data without permission, and as a result they have made their complete data tables available only by subscription or the signing of a terms of service contract, prohibiting the use of their data in any aggregation model. In most cases, polling firms – despite their objections – are unwilling to forgo the media publicity associated with being part of poll aggregators. The growing influence and prevalence of aggregators in elections held around the world suggest their impact on the polling industry is worthy of deeper study.

As we discussed in the previous section, poll aggregators influence how political parties do their polling. Parties and politicians keep an eye on the poll aggregates and seat projections, particularly local candidates who do not have their own poll data for their riding. Parties with smaller budgets for polling rely in part on these publicly available poll aggregates to monitor the national and regional voting trends, opting to spend their resources on polling of target regions or groups of ridings instead of national surveys.

It is unclear what impact poll aggregations – despite their popularity – have on voters. For example, CBC’s Poll Tracker has consistently attracted thousands of page views daily in every election since its launch. It is also a popular Internet destination between election campaigns. Whether the aggregation has more or less of an impact on voters than the individual polls reported by other

media outlets is impossible to assess, but it does seem that the emphasis on seat projections has an influence on how voting intentions are discussed. In the past, unless they have their own seat projection models, pollsters have spoken in more general terms about whether their numbers indicate a majority or minority government for one party or another. Presenting seat estimates with the aggregates appears to give journalists more confidence in discussing the practical implications of what poll data suggest could be the outcome of an election, fraught with risk as that might be.

Poll aggregation does face some challenges going forward, including how willing pollsters will be to make their poll data accessible to both aggregators and the public. There is also the risk posed by incorrect election calls. The promise of poll aggregation is increased accuracy, but the aggregation is only as good as the polls included in it. Even in elections in which some polls are accurate, a few bad polls can make the entire aggregate – and thus “the polls” as understood by the public – less accurate. As well, there is the challenge of using poll data to make seat projections or probability estimates of electoral outcomes, adding a second potential for error to the risk of error that already exists in public opinion research. Nevertheless, the increasing presence and popularity of aggregators suggest that they meet a public need for more digestible and practical information during an election campaign. If it presents an opportunity to show the value of public opinion research and the capability of individual polling firms, then pollsters and aggregators can complement each other’s work in making it accessible to a wider audience.

Notes

- ¹ Rogers, *The Pollsters*.
- ² Wakeman, *The Hucksters*.
- ³ Blondiaux, *La fabrique de l’opinion*, 158.
- ⁴ Ibid.
- ⁵ Micheau, *La prophétie électorale*, 29.
- ⁶ Warren, *In Defense of Public Opinion Polling*, 87.

- ⁷ Gallup, *The Pulse of Democracy*, 8.
- ⁸ Glynn et al., *Public Opinion*, 14.
- ⁹ Turcotte, “Polling as Modern Alchemy,” 207.
- ¹⁰ Lees-Marshment, *Current Issues in Political Marketing*, 10.
- ¹¹ Bruckweh, *The Voice of the Consumer*, v.
- ¹² Lees-Marshment et al., *Political Marketing*, 64.
- ¹³ On campaign financing legislation, see *ibid.*, 88.
- ¹⁴ *Ibid.*
- ¹⁵ Silver, *The Signal and the Noise*; Issenberg, *The Victory Lab*.

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