

The Coming of Age of Online Polling

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Online Polling: An Overview

"... the Internet is quickly becoming the dominant way of connecting pollsters and people."

Advances in technology have facilitated the work of public opinion pollsters for decades. Today, we are in the midst of a revolution as the world of polling and research undergoes a deep transformation.

As refusal rates to telephone surveys skyrocket and respondents seek out new ways to protect their privacy and leisure time, online polling is opening up a whole new world of expanded functionality, quality and convenience. Offering a better mix of cost, efficiency and speed, the Internet is quickly becoming the dominant way of connecting pollsters and people.

While the telephone served as a great tool in the initial stages of polling, it is widely estimated that more than 80 per cent of potential respondents are now refusing to participate in surveys over the telephone. In addition to the high refusal ratings, telephone polling is also facing a major obstacle as the number of land lines drop around the world and mobile phones become ubiquitous: only in North America, almost one-in-six adults are inaccessible to pollsters because they communicate exclusively by cell phone or employ blocking and screening devices that prevent surveyors from reaching their households.

Internet polling is now favoured by respondents due to its non-intrusive nature. They feel less restricted by time limitations or the social pressure of having to talk to complete strangers over the telephone, and therefore are more likely to elicit more forthcoming and honest responses¹, as several studies have shown. Respondents are also benefiting from the visual and audio capabilities of online polling, as their role in a survey becomes less passive and more interactive.

Polling over the Internet is relatively new but it is already a well established method in the world of market and public opinion research. As more research and development is conducted in order to improve the capabilities of online polling, it is evident that this method has immense potential to grow and improve.

As Humphrey Taylor, Chairman of the Harris Poll recently expressed, "If you look at the whole market research industry, by far the biggest trend is the

1 A. Johnson, "Self-Disclosure in Computer-Mediated Communication: The Role of Self-Awareness and Visual Anonymity", *European Journal of Social Psychology*, (Vol. 32, No. 2), pp. 177-192; A. Joinson, "Social Desirability, Anonymity, and Internet-Based Questionnaires", *Behavioral Research Methods, Instruments, and Computers*, August (Vol. 31, No. 3), pp. 433-438; and Nantel, "Further Evidence About the Differences Between Response Characteristics from Web and Telephone Surveys".

movement towards Internet-based online surveys of all kinds. All the growth in the market research industry worldwide is coming from the growth of online polling, not from more traditional polling methods."²

Reliability and Integrity of Online Surveys

"... respondents take the interview more seriously and expend more cognitive energy in online surveys ..."

Online polling firms have proven themselves to be a "welcome innovation in the survey world"³, a reliable and trustworthy method of gathering responses through easy-to-navigate, visually appealing questionnaires. While traditional criticism of online surveys points to telephone surveys as a more dependable, established method of achieving information, more and more studies reveal that online methodology increasingly offers speed, economy, and improved data quality when compared to other means of conducting surveys.

Case studies have shown that "respondents take the interview more seriously and expend more cognitive energy in online surveys than in telephone surveys."⁴ Online surveys effectively eliminate the cognitive bias which occurs when a respondent feels compelled to answer in a certain way when prompted by a human voice. Since they have more time to consider the questions, respondents can review the options in their own time and not feel the pressure of expressing an opinion they may not even have.⁵

The online approach to conducting surveys provides respondents with the opportunity to reflect on issues, discuss their experience in their own words and assess the actual state of the subject brought before them without any incidence of cognitive bias or social pressure. In turn, this allows for a deeper exploration of views on a variety of topics of a personal, financial and knowledge-testing nature.

Good data quality in online polls not only stems from ensuring a good experience for the respondents, but also from the quality of the sample. Most online

2 Public Affairs News, http://www.publicaffairsnews.com/issues/articleview.asp?article_id=177.

3 Doing research: *Methods of Inquiry for Conflict Analysis*, Daniel Druckman, 2005, pp. 157.

4 Ibid.

5 Jacques Nantel, "Further Evidence About the Differences Between Response Characteristics from Web and Telephone Surveys: Could it be that Information Gathered from Web Surveys is More Valid?", Conference Paper (Las Vegas) & Catherine A. Roster, Robert D. Rogers, Gerald Albaum, and Darin Klein, "A Comparison of Response Characteristics from Web and Telephone Surveys", *International Journal of Market Research*, February 2004 (Vol. 46), p. 359.

pollsters employ access panels from which samples are drawn for individual studies. Respondents are recruited via a variety of methods such as email lists and targeted banner ads that ensure a wide coverage of the general population. Only those who decide to join the access panels become a part of the pool of respondents.

Research companies thus have access to important information about the panelists that allows them to make sure their responses are in tune with their profile and to keep track of their opinions—this can be particularly useful when conducting election polling and longitudinal studies that require that the same respondents participate in a survey several times.

Angus Reid Strategies employs an access panel to conduct its surveys. Below is an explanation of how its Internet-based surveys have proven reliable and integral by ensuring the health of its panel.

Angus Reid Strategies: In-Depth

"Angus Reid Strategies ... is now the largest Canadian-owned market research enterprise."

Angus Reid Strategies is on the forefront of an evolution that is transforming market research and public opinion polling. Since its conception in 2002, Angus Reid Strategies has become one of the most trusted, authoritative names in market research at a domestic and international level. A North American leader in the use of the Internet and rich media technology to collect high quality, in-depth data for market research and public consultation, Angus Reid Strategies covers a full range of marketing and public affairs issues—including advertising effectiveness, corporate image assessment, new product evaluation and public opinion trends.

Angus Reid Strategies, along with its sister company Vision Critical, is now the largest Canadian-owned market research enterprise. In addition to its five offices in Canada—located in Vancouver, Calgary, Toronto, Regina and Montreal—the firm also has offices in San Francisco, New York, Chicago, Paris, Sydney and London. Its team of specialists provides solutions across every type and sector of research, and currently serves over 200 international clients.

Dr. Angus Reid and his team are pioneers in online research methodologies, and have been conducting online surveys since 1995.

(1) Angus Reid Forum

"... highly visual, interactive and engaging surveys, ensuring thoughtful and true-to-life responses to questions tackling complex subject matters..."

All of Angus Reid Strategies polls are conducted through the Angus Reid Forum, an online panel of almost 100,000 Canadians, representing all socio-economic groups and regions.

Launched in 2006, the panel is recruited via a process that incorporates a randomized, widespread invitation approach and a triple opt-in screening procedure. It is maintained through state-of-the-art sampling techniques and frequent verifications of personal identity, contact information and demographic characteristics.

The Angus Reid Forum is Canada's leading online market and public opinion research panel. Its uniqueness stems from its ability to present panel members with highly visual, interactive and engaging surveys, ensuring that respondents provide thoughtful and true-to-life responses to questions tackling complex subject matters. Pictures, audio and video clips become part of the experience for respondents, who are not asked to remember something they might have seen or heard in the past, but presented with the opportunity to see and hear it in the present.

(2) Panel Recruitment

"Angus Reid Strategies ensures that the panel reflects the general population by continually verifying and recruiting."

The Angus Reid Forum is recruited via a proactive campaign that reaches potential panelists via targeted banner ad placements in an extensive array of websites and through partnerships with non-governmental and charitable organizations (via endorsed e-mail invitations). This method ensures an appropriate demographic balance that captures Canada's diversity across all sub-segments of the population. Only those who decide to join the Angus Reid Forum become a part of the pool of respondents.

Using a variety of sampling regions based upon configurations of federal and provincial electoral districts, Angus Reid Strategies ensures that the panel reflects the general population by continually recruiting and verifying so that the socio-demographic characteristics of each sampling region match actual sub-populations according to Statistics Canada and Elections Canada data.

(3) Ensuring Representativeness

"The Angus Reid Strategies surveys are based upon randomly-selected, representative samples that are statistically weighted according to the most current demographic, regional, and political voting data available..."

Today, the level of Internet penetration in Canada is very high—approximately four-in-five Canadians have online access either at home or at work (with most having access at both locations). With Canada being one of the most connected countries in the world, online access has spread to every key demographic group in the country, including seniors and people with above and below average household incomes.

Comparatively, telephone surveys face continually declining response rates—often fewer than 15 per cent of Canadians agree to participate in telephone surveys. Moreover, the sizeable increase in cell phone use in households represents another demographic that is not being reached by pollsters who rely on the telephone.

Our panel contains enough people in each major demographic group in Canada to draw random samples that do represent the population as a whole. In order to ensure that the online research accurately depicts the public at large in terms of both demographics and attitudes, Angus Reid Strategies surveys are based upon randomly-selected, representative samples that are statistically weighted according to the most current demographic, regional, and political voting data available from the Census and Elections Canada. The Angus Reid Forum has an average survey response rate of over 50 per cent.

(4) Conducting Surveys

"Naturally, Angus Reid Strategies abides by strict guidelines on confidentiality and privacy, never divulging any of the panel members' personal information..."

When Angus Reid Strategies conducts a survey, the first step is to randomly select a portion of the sample that is representative of the general population at large, while always being mindful that the panel members do not receive survey invitations too often or repeatedly on the same subject. The panel members are then emailed and invited to complete the survey by clicking on an Internet link to a secure online survey platform.

In order to participate in the survey, these members must log in with their username and password. This ensures that the right people complete the survey, and enables their answers to demographic questions to be confirmed according to the information that they provided the Angus Reid Forum when they first registered.

Respondents also receive a small monetary incentive—ranging from \$1 to \$5—for completing each survey, as well as occasional prize draws. This encourages respondents to participate regardless of subject matter. Mail delivery of accumulated incentive cheques also allows us to further verify the identities

of our panel members. Naturally, Angus Reid Strategies abides by strict guidelines on confidentiality and privacy, never divulging any of the panel members' personal information and other details.

(5) Cutting-Edge Survey and Panel Management

"... the Angus Reid Forum presents panel members with visually-rich surveys ..."

By utilizing the industry-leading interactive survey software developed by Vision Critical, the Angus Reid Forum presents panel members with visually-rich surveys that create realistic environments and incorporate interactive experiences such as drag-and-drop features, embedded video and audio. This unique approach to polls creates a more engaging survey experience that captures more thoughtful responses from the panel members. It also allows the researchers at Angus Reid Strategies to tackle complex subject matter and survey techniques in respondent-friendly ways.

The Angus Reid Forum also benefits from a longitudinal capacity, archiving all panelist survey responses over time. This allows the research team to gain the most insight out of the data collected and to better track and understand the significance of trends as they emerge and develop over time.

Proven Accuracy of Online Polls

"All over the world reputable media outlets have already turned to online polling due to its accuracy, swiftness and reliability in predicting poll results."

Angus Reid Strategies is part of a group of forward-thinking research companies that have proven that online polling is not only accurate and reliable, but quite simply better than telephone polling.

Without a doubt, the most effective way to gauge the accuracy of public opinion research is an election. All over the world reputable media outlets have already turned to online polling due to its accuracy, swiftness and reliability in predicting outcomes. Democratic processes at the municipal, provincial and national level present the best opportunity to evaluate whether opinions expressed in online surveys match those declared at the ballot box—and according to a great deal of ongoing research, online polls are passing the test and "changing the science of election studies in very beneficial ways."⁶

⁶ Clarke, Harold D., Kornberg, Allan, Scotto, Thomas J., Henry Veitmeyer, 2007. pp. 13.

(1) Worldwide Elections

"I believe that online research has now come of age."

The *Wall Street Journal* relied on the services of Zogby Interactive to review how voters in specific American states felt about presidential and senatorial candidates in 2004 and 2006. YouGov—the pollster of record for Britain's *Daily Telegraph* for years—also established a relationship with the London-based *Economist* to track the views of American voters on a weekly basis during the 2008 U.S. presidential race. According to the award-winning international newsmagazine, YouGov would allow its reporters and editors to "look at standard measures of public opinion" and "use the speed of Internet polling to ask topical questions."⁷

Media coverage for the 2008 presidential election also relied heavily on the work of online pollsters such as Zogby and Harris Interactive. The *Economist* joined forces with YouGovPolimetrix—YouGov's branch in the United States and Canada—to gauge the opinions and voting intention of Americans in the run-up to the presidential ballot. Working solely from online polling results, the company was able to match the election results exactly—53 per cent for Barack Obama, 46 per cent for John McCain.

YouGov president Peter Kellner saw the accurate prediction as a sign of progress for online polling, saying, "With the success of YouGovPolimetrix in the United States, I believe that online research has now come of age."⁸

A post-election study gauging survey accuracy during the 2008 election campaign shows that online pollsters Harris Interactive and YouGovPolimetrix were amongst the top five firms to accurately predict the final outcome. In light of the recent success of online pollsters in predicting this election, Humphrey Taylor, Chairman of Harris Poll, also pointed to the accuracy of online polling when compared to the telephone method saying that, "in the almost 80 elections in the United States and Britain where we can carry out a comparison, the final forecasts of online opinion polls have on average been somewhat more accurate than telephone polls."⁹

YouGov's online polls had already successfully predicted the outcomes of the 2003 Scottish Parliament election, the 2001 and 2005 general

elections in Britain, and more recently, London's mayoral race in May 2008, in which the company's pre-election numbers matched the election results exactly—53 per cent for Boris Johnson versus 47 per cent for Ken Livingstone.

(2) Canadian Elections

"Angus Reid Strategies was the most accurate pollster to predict the outcome of the October 2008 Canadian federal election."

In Canada, Angus Reid Strategies has accurately predicted the results of the 2008 federal election and six provincial elections via the Angus Reid Forum. No other pollster has predicted so many successful outcomes in such a consistent manner.

Building on its continuing success and accurate predictions, Angus Reid Strategies is constantly approached by leading media organizations for its ability to not only assess what Canadians are thinking, but what the world is thinking about Canada. In 2008, researchers at Angus Reid Strategies formed an alliance with the *Toronto Star*—Canada's best-selling daily newspaper—to produce high-quality informative surveys on social, political and economic issues on a regular basis.

2008 Federal Election

Angus Reid Strategies was the most accurate pollster to predict the outcome of the October 2008 Canadian federal election, coming closer than seven other research companies conducting surveys during the campaign—all of them through the telephone.

During the six-week long campaign, Angus Reid Strategies conducted surveys with a longitudinal sample of 1,500 respondents and accurately depicted the mood of Canadians regarding the election. Several reputable news organizations—including the *Toronto Star* newspaper, *Macleans*' magazine and Chorus radio—relied on Angus Reid Strategies to gauge the opinion and voting intention of Canadians until 24 hours before Election Day.

In the end, Angus Reid Strategies came within five points of the actual results, closer than anyone else.

2007 and 2008 Provincial Elections

Angus Reid Strategies' online methodology has not only proven accurate at the federal level but also in provincial ballots. It has correctly predicted the outcome of six provincial elections—Manitoba, Ontario, Saskatchewan, Alberta and Quebec (twice).

The March 2007 provincial election in Quebec marked the first Canadian test for the use of the Angus Reid Forum in a democratic process. The final outcome of

7 The *Economist*/YouGov Poll. May 19, 2008. http://www.economist.com/displaystory.cfm?story_id=10085476

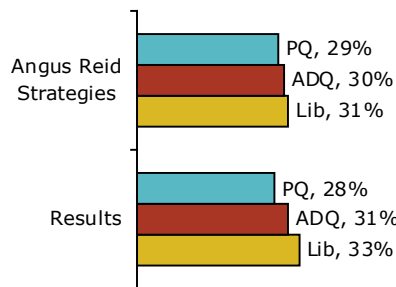
8 Davidson, Darren, "YouGov bang on the money with US presidential election prediction", Nov. 7, 2008, *Brand Republic*, <http://www.brandrepublic.com/News/860495/YouGov-bang-money-US-presidential-election-prediction/>

9 Humphrey Taylor, Chairman, The Harris Poll, *The Economist*, Nov. 8, 2008, "Letters" Section.

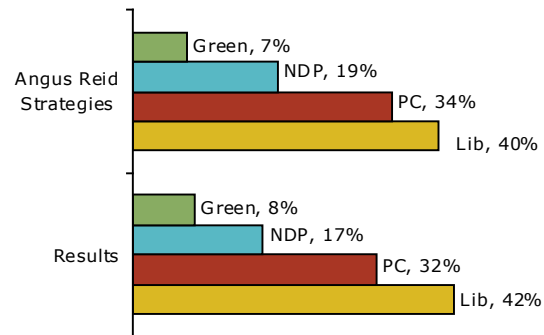
Accuracy of Federal Election Polling

	Conservative Party	Liberal Party	New Democratic Party	Bloc Québécois	Green Party	Difference
<i>2008 Election Result</i>	38%	26%	18%	10%	7%	
Angus Reid (1)	37%	27%	20%	9%	7%	-5
Ekos (2)	35%	26%	19%	10%	10%	-7
Leger Marketing (3)	36%	27%	20%	8%	9%	-9
Ipsos-Reid (4)	34%	29%	18%	9%	8%	-9
Harris/Decima (5)	34%	25%	19%	11%	9%	-9
Nanos (6)	34%	27%	21%	10%	8%	-9
Strategic Counsel (7)	33%	28%	18%	10%	11%	-11
Segma (8)	35%	23%	21%	10%	11%	-13

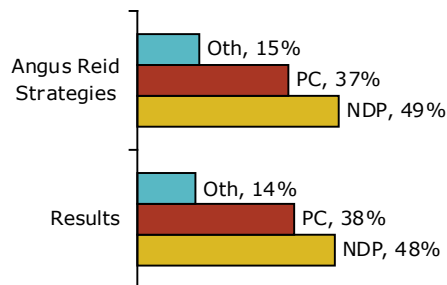
this ballot was remarkably close to the forecast of the Angus Reid Strategies survey of Quebecers. The study was also the only one to foresee the second-place finish of the Action Démocratique du Québec (ADQ) party.



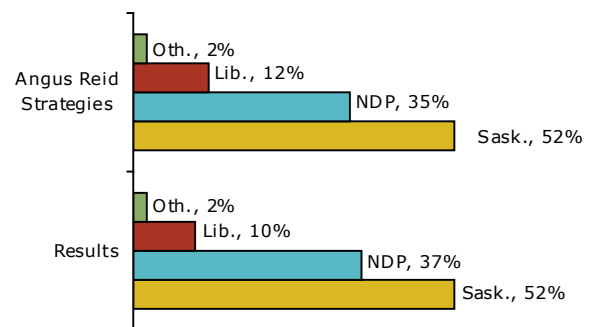
In October 2007, an Angus Reid Strategies survey conducted before the Ontario provincial election came well within the advertised margin of error, and was able to accurately predict a victory for the governing Liberal Party.



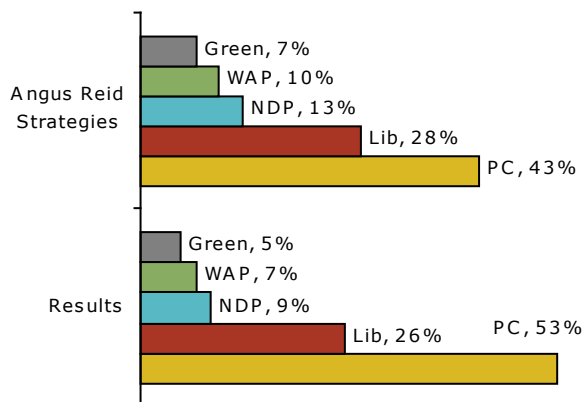
In May 2007, the Angus Reid Strategies voting intention poll conducted before the Manitoba provincial election also accurately predicted the final outcome, anticipating a high level of support for the governing New Democratic Party (NDP).



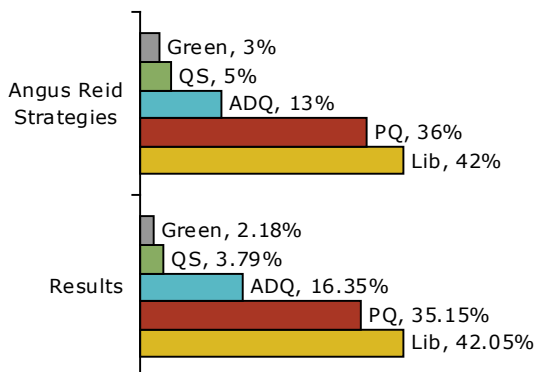
In November 2007, Angus Reid Strategies made its fourth accurate electoral prediction in a row, anticipating a clear victory for the Saskatchewan Party in the Canadian province's legislative ballot.



In March 2008, Angus Reid Strategies forecasted its fifth provincial election in a row by anticipating a victory for the Progressive Conservatives in Alberta.



In December 2008, Angus Reid Strategies was once again the most accurate pollster in Quebec, foreseeing a single-digit margin of victory for the governing Liberal Party.



Three Misconceptions

(1) "Web polls are useless. Anyone can take part and skew the sample."

Surveys conducted by means of online panels should not be confused with the millions of "quick polls" (or "instant web polls") that appear in websites all over the world. These "quick polls" serve to take the pulse of readers and visitors to specific websites, but are neither scientific nor descriptive of a particular population.

While the "quick polls" do elicit the opinion of respondents and can be filled out by anyone with access to the Internet, their results—usually

accompanied by a disclaimer—should never hold the clout of a representative survey. The polls conducted and released by Angus Reid Strategies are always accompanied by a section that describes the methodology in detail: number of interviews, the dates during which the survey was conducted and the sampling margin of error. While the Angus Reid Forum uses "quick polls" from time to time as a device to recruit new panelists, the results are never released to the public.

(2) "An online panel is not randomly selected."

Some critics claim that online polling is biased due to the fact that respondents are given a choice on whether or not they want to participate in a survey. The criticism is that instead of being randomly picked via a list of telephone numbers, people are free to make the decision on whether or not to take part, skewing the random sampling approach.

This argument wrongly assumes that each person will be asked to take part in every online questionnaire at every given time. However, in order to truly ensure a representative sample, invitations for particular surveys are only sent to a randomly selected portion of the Angus Reid Forum—and the same panelists are not addressed each time a survey is released.

(3) "An online panel cannot represent the entire population."

Another misconception about online polling alleges that certain segments of the population are underrepresented, making a credible sample unattainable. In Canada, four-in-five people now have access to the Internet. The Angus Reid Forum, whose base continues to grow as more Canadians become interested in voicing their opinion, counts with enough panelists from every demographic group to guarantee that its samples are representative of the entire adult population.

In Europe, particularly in Britain and Scandinavia, polls conducted through online panels have proven to be representative of the entire population, even more so than telephone-based research (due to high rejection rates and the widespread use of cell phones).

Still, gathering interviews is only one of the steps involved in a very thorough questionnaire process. Ultimately, every survey requires a procedure known as weighting. This exercise—an essential component of public opinion research—entails a careful analysis of the responses in accordance with up-to-date social and demographic data. This ensures that the make-up of a constituency (a city, a province or the whole country) is carefully represented within the sample, in areas such as gender, age, income and education—as well as political affiliation and language.

Benefits of Online Surveys: A Summary

- Substantially reduced cost compared to other survey methods.
- Higher response rates than telephone polls.
- High-quality, interactive visual support.
- Increased respondent flexibility.
- Great tools for targeting specific populations.
- Anonymity of respondents allows for forthcoming responses to sensitive topics.
- Simplified compilation and analysis of data.
- No interviewer bias or error and no time constraints for panelists.
- Internet security and encryption allows for the protection of personal information.
- Live assistance and customer support for panelists during surveys.

Conclusion

Interactive research technology is effective not only in winning back the trust of poll respondents—who seek to express their views in a comfortable setting at a time of their choosing—but also in pinpointing the latest political and consumer trends in a quick and reliable fashion.

Angus Reid Strategies exemplifies the validity of online public opinion research. Our surveys are not “quick polls”, but genuine scientific snapshots of a representative, random sample of Canadians, whose accuracy has been proven at the ballot box.

Although clear differences between online and telephone surveys do exist, they are minor and the ensuing findings from online data remain the same—regarding both the attitudes¹⁰ and behaviour¹¹ of people. And after several years of rapidly gaining popularity and trust, it becomes evident that while it is impossible to predict all the technological and cultural changes that survey researchers will encounter in the future, “online research is now beyond the ‘prove-it’ stage”¹² and is here to stay.¹³

10 Jacques Nantel, “Further Evidence About the Differences Between Response Characteristics from Web and Telephone Surveys: Could it be that Information Gathered from Web Surveys is More Valid?”, Conference Paper (Las Vegas).

11 Ibid.

12 “Benefits of Web Surveying Add Up” http://www.nucifora.com/art_200.html

13 Conducting Online Surveys, Valerie M. Sue & Lois A. Ritter, 2007), pp. 151.