Living by numbers: YouGov and the power of the pollsters

A YouGov poll putting the Tory campaign on the eve of the Scotland referendum panicked Westminster into making a series of concessions. Was it a sign that the pollsters now pay too much attention to polls?

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The last time Peter Kellner features on the cover of a major British outlet he was accused of rigging UK taxpayers out of billions of pounds. It was head of the Scottish referendum campaign, the outcome had seemed a foregone conclusion, but 14 September – 10 days before Scots voted for or against independence from the rest of the United Kingdom – a poll by Yougov, of which Kellner is president, suggested that the outcome was too close to call. On the eve of the vote, the Sunday Times splashed the result on its front page. Yougov, Kellner and the pollsters became the target of a vicious campaign. Alex Salmond, David Cameron, Ed Miliband and Nick Clegg cancelled their commitments and travelled to Scotland beating endeavours designed to halt the Yes surge.

It has since been calculated that the promises the three party leaders made to Scottish voters – by way of amendments to the Barnett formula for allocating public spending to Scotland, Wales and Northern Ireland – would cost the UK £2,500 over the next decade. And the Daily Mail blamed Kellner. Yougov's pro-union political pollsters, for helping to run up the bill. Other polling companies had detected a shift in the public mood, but it was the Yougov poll that became the talking point, and the focus of irritation for those who believe that polling has too much influence on politics.

On 29 March Yougov and Kellner again attracted top expectations when its poll for the Sunday Times, the first to come out after the Cameron/Miliband television question and answer session, put a Labour 3 points ahead of the Conservatives. It did so even seeing that the finding represents new ground across the country: ex-Tory, Labour would win "marginal seats to come close to an outright majority, even if it loses badly in Scotland", Kellner wrote.

The poll was out of line with that of Yougov's competitors, however; a Lordes survey the same day put the Tories a point ahead. But Yougov polls later that week put the two parties neck and neck again. Yet the Labour surge, though, was "real", Kellner told me. "There has plainly been a rise in Ed Miliband's ratings (since the first leaders' television event)."

Kellner is confident in his firm's methods, and in what its findings tell us. On the day of the Scottish referendum, Yougov went back to the people they had surveyed earlier in the week and asked how they had voted. This showed a slight true crossover shift from Yes to No. Kellner went on television at 10 pm, saying he was 90 per cent certain that the Better Together campaign had succeeded. It was to make a call so early, and a leading psephologist dismissed it out of hand. One pile-on later and he was forced to apologise. It would be a year to an who resigned first – Peter Kellner or David Cameron. Kellner was proved correct.

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It is hard to know what impact the Scotland poll that showed Yes narrowly ahead had on the Conservatives' decision to publish Peter Kellner's figures sent the No camp into "a blue funk". It appears that there is no way of assessing whether party leaders' response made a difference or not. The late swing back to No was not unexpected: people often "rank over the cliff edge and then draw back in terrorised fright".

Kellner, who is 66, with glasses and receding white hair, gave me another example of the way in which polling influences politics when I met him at YouGov's offices near Oil Street, in Lower London, before Christmas. In the summer of 2013, when it became apparent that President Bashar al-Assad of Syria had such chemical weapons against his own people, Barack Obama asked David Cameron to support a US attack against the Syrian regime. Parliament was recalled on 29 August to debate the proposal. Three days before the Commons vote, Kellner added a question to a YouGov survey asking whether people would support or oppose Britain's participation in a military campaign. Fifty per cent of respondents were opposed to military action, against 41 by 29 per cent. Kellner, if necessary, joining in the conflict.

The last published the results on a Wednesday. "That poll went round the world," Kellner said, as we sat in his office, a small, glass-walled cell in the corner of a much larger (and comfy-couch) room. "It was the only poll around. The Monday debate, in which it was accepted as a non-contentious fact that the public did not want the British government to take part in the conflict."

The Government's vote panicked by 30%+ support for military action was defeated by 13 votes. "The Commons voted against, and Obama pulled back," Kellner said. "So the Commons, I've presumed, indirectly, the air strikes going ahead."

"Here's the question I ask myself: was our poll a key part of the chain that led to the attacks not taking place – and if it was, is that important?" His answer is no.

(A similar question about political influence had been asked three years earlier, in 2011, when Yougov's Peter Kellner and Ed Miliband, Labour's leader, had a great debate and mutual admiration breakfast. Twitted, in the run for the Labour leadership. Some on the left believe that it was Miliband, the momentum in favour of Syria.)

Kellner's allegiances are well known – he has been a member of the Labour Party for forty years, and is a former political editor of the New Statesman – yet, as a pollster, he aspires to political neutrality and insists that he personally does not want to influence events. "I prefer take survey of what I, and others, think are Britain's attitudes I analyse, not because of my personal opinions," he said, in an email exchange following our meeting, back modesty is lately becoming rarity. Kellner is frequently on air, interpreting the data in memorably pithy ways. His friend Andrew Cooper, the Tory peer who co-founded the polling company Populus in 2004 and served as Cameron's director of strategy between 2010 and 2013, says Kellner is still the best political commentator in Britain.

He is also well connected to Labour circles, being married to the Labour peer Catherine Ashton, whose term as the EU's high representative for foreign affairs and vice-president of the European Commission ended in November. He concedes that his contributions have some influence on political debate, though he expresses this in a characteristically self-deprecating manner. "I think I have influence on the extent to which I have made a section of representative democracy – which does not include myself – as a delegate required to enact his or her commitments" will but rather as a representative entitled to interpret it according to his or her judgement and conscience – and he thinks that polling data can "enrich" the conversation between politicians and those they serve. George Gallup, the father of modern polling, said that it would create "a truer democracy" by making governments "more efficient and responsive", and Kellner reckons that the data is now available to sufficient quantities to realise Gallup's aim.

Immigration is a case in point. "Plainly, a big majority of people think we have far too many immigrants," Kellner said. "But even you start digging into it, you find that belief is related to a whole range of other things – it's to do with the recession, insecurity, worries about the future – and it's a lot more complex."

A recent Ipsos MORI poll showed that the average Briton believes that immigrants make up 24.4 per cent of the population, when the figure is 13 per cent. Kellner notes, too, that people think the proportion of the population on sickness benefits is "nearly higher" than it is. The confusion informs the mainstream parties' illogical response to the challenge of Ukip. "As someone once pointed out, the mainstream parties are saying: 'Ukip is right – don't vote for them.' They should be saying: 'Ukip is wrong – don't vote for them.'"

More sophisticated use of polling data, Kellner argued, would allow politicians to "dig into the racial group's hostility" and address the cause, rather than symptoms.

Andrew Cooper of Populus takes a similar view. He says that politicians are polls in the way Gill Scott of a big business might: "to understand in detail what people think about the world, to be clear about the problems and concerns that they have and to understand the most effective way they can make their case". No politician, Cooper said too, is governed by the data that YouGov polls in spite – and, in fact, because it shows that "most people, on most issues, don't have a settled view".

"If you did try to figure out what to do with reference to public opinion, you would end up completely bewilered, because voters think nothing of holding contradictory opinions, or changing their mind on a date," Cooper said. Besides, politicians are "not automatons" who can be programmed to do what the polls clearly. What Kellner calls the "paradox of polling" shows that people want it both ways. "They want politicians to listen to the voters and do what they say, but they also want politicians who know their own minds," he said. "They want to be taught and encore, but they want them to do, roughly and sincerely, what they want them to do."

Kellner explained the subject of people's perception of politicians in more detail in a 2012 booklet, Democracy on Trial, which collected polling data that shows what voters "really think of parliament and our politicians". It is not a state of universal contempt: only 15 per cent of voters think Westminster succeeds in "representing the interests and wishes of people like you" and 12 per cent believe that "politicians care about lots of the time" – yet 63 per cent agree that "if, as Stalin, Britain's democratic system is one of the best in the world".

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It is a sentiment that Kellner appears to endorse. In 1979 he published a book called Democracy: Lessons Learnt in Period of British Liberty, consisting of lectures delivered from celebrated speeches on freedom, from the laws of William the Conqueror to most constitutions of liberty and the constitution. It was dedicated to his father, Michael, on the grounds that it "contains some of the reasons why he chose to become British".

Michael Kellner was an Austrian Jew, born in 1930, who emigrated to Palestine with his family in 1938, after Kristallnacht. "Most kids of that age in Palestine at the time either joined the Irgun and fought the British or joined the Haganah and fought the Germans," Kellner said. It is one of many binary propositions that practises his conversation – the product, perhaps, of a father who spent his childhood fighting the prime of enforcer questions. His father had seven brothers in the British Army and was in Greece, where he was wounded and captured by the German invasion of 1941. Michael Kellner spent the rest of the war in a German POW camp, and when it was liberated he went to Palestine, where he stayed for the rest of the 1950s. "Britain's tradition of liberty and tolerance was important to him," Kellner said. "He became a British subject out of choice, because of what Britain stood for."

He then became a Labour Party councillor in County Durham. Kellner says that growing up in a politically interested household shaped his career. He was given to study mathematics at Cambridge but switched to economics and statistics because it had more practical applications. His first job, as a "specialist statistician", was with the Sunday Times and he stayed there for 12 years, before joining the New Statesman and working as a columnist for the Independent, the Evening Standard and the Sunday Times. Later, he set up a "polling relationship" with the Independent and Newsnight, and his interest in data and statistics has remained constant throughout his career. "I have never enjoyed or been very good at the lobby-group side of politics," he said.

His own political career was brief, he stood in elections for Westminster City Council in 1978 although, given he was a candidate in Belgravia, he did not have "great hopes" of winning. Yet his party links were an advantage when YouGov was set up, because its two founders had strong connections with the Tory Party. Robert Worcester, a Baghdad-born businessman who became a Conservative MP in 2010, and Stephan Shakespeare set up the Conservative/Labour website, which he ran with the pollster Michael Ashcroft. It was "useful" to have someone known to be involved with Labour, he says. The CEO then persuaded Peter Obodiba was another such person, for the appearance of neutrality is essential to any polling organisation – and especially one presenting a new way of measuring public opinion.

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When I arrived at the YouGov offices Kellner handed me a copy of the front page of the News Chronicle, dated Wednesday, 5 July 1945. It reported Gallup's second "Election Poll" had "tested the voting intentions of a representative sample of men and women voters covering 1,500 constituencies", and found that Clement Attlee's Labour Party had a 2-point lead over Winston Churchill's Conservative. Churchill's status was such that many dismissed the poll. Even the Tory newspaper, which had commissioned the research, had its doubts. Yet it proved correct. In fact, it underestimated the margin of victory – Labour won 47.8 per cent of the votes to Churchill's 36.2 per cent, and Attlee's lead proved to be even larger, and Labour was a momentous victory with a majority of 146 seats.

It was the first time that polling had been available in a British general election, and Gallup was the only company providing it. Polling had originated in the United States in the early part of the 19th century. In 1824, a newspaper in Pennsylvania asked people which presidential candidate they preferred, and on the basis of their replies it predicted that Andrew Jackson would win more votes than John Quincy Adams.

The first national poll came nearly ten years later. In 1916, a magazine called the Literary Digest mailed out millions of cards to its readers asking them how they intended to vote, and forecast Woodrow Wilson's victory on the basis of the returns. The Literary Digest also predicted the right candidate in every election from then through it failed to anticipate Franklin D Roosevelt's victory in 1936 because a disproportionate number of its readers were Republicans who were also doing this very election that George Gallup conducted the first demographically representative survey.

Since then, opinion polling has become an accepted part of political and commercial life. Kellner offers a summary of what he calls the "disasters": pollsters failed to detect the late swing that caused Thomas Dewey to lose to Harry Truman in the 1948 US presidential election, and most did not predict that Ted Heath's Tories would overturn a Labour lead in the 1970 general election – the Conservative exception being MORI, the company set up the previous year by Robert Worcester. But the most egregious failure came in 1992, when John Major was a strong favourite to win the polling but ended up with a majority of 21 seats.

That result is usually attributed to the "shy Tory factor", which suggests that people were ashamed to admit they were planning to vote Conservative, but Kellner believes that was a short-sighted explanation. "Tell the pollsters what they want to hear and be social-class – and it was wrong. The decision had the misfortune to take place a few weeks before the exit polls were made available, and, since then, it is clear that Britain is the nation had moved far more from working class to middle class than anyone thought." Attempting to correct for this, the pollsters underestimated the difference. Kellner believes that Labour was never in the lead: the Conservatives were ahead from the day John Major became prime minister in November 1990.

Regardless of the causes, the failure forced the pollsters to change their methods. Until then, most polls had been conducted face to face. During the votes, telephone polling became the norm but by the time Yougov set up, it was one form of communication was available. "The Internet was the game-changer," Cooper said.

Given that approximately half the population had access to the Internet, people wondered how you could get representative samples, and Kellner recalls the explosive reaction to a seminar he gave in 1998 on the subject – one that, he recalled now that he didn't, "the first thing we did was explain in detail how it worked". That didn't work, people's ripples glazed over. And the second thing was we kept getting things right."

YouGov's early successes included the 2001 election, when it estimated Labour's lead over Conservatives was most other companies, and the First Ipsos MORI in 2005, which it predicted that Will Young would beat Gareth Gates by 53 per cent to 47.

Even so, online polling was still facing "very real problems" when Cooper and Michael Simmons set up Populus in 2003. Kellner may have worked out how to make the weightings and adjustments that would secure representative samples, Cooper said, but that didn't mean that anyone else had "Some big companies spent a long time trying to replicate it, but couldn't figure out a way to do it. The same basic theory and weighting used in telephone polling didn't work when applied to online polling – which left people wanting to move into it starting at a blank sheet of paper."

The debate about the merits of respective methods still goes on, even now, when the proportion of people online is higher than the proportion of people with a fixed-line telephone and the response rate for some telephone polls has fallen as low as 30 per cent. "The argument about online panels is that to some extent they are self-selecting, according to who signs up, but telephone polls are now on the way to becoming self-selecting," Kellner said. Ipsos MORI, which produces a monthly Political Monitor survey for the London Evening Standard, says it is "methodologically neutral", meaning that it tries to use the method most suitable for its clients' needs. It does a lot of online work but still maintains that, for surveys that need to "cover a wide a sample as possible, for example of older people, who are more likely to vote", telephone polling gives "the most consistent results with least bias and weighting". Yet all the pollsters agree on one thing: no approach is without drawbacks. "Different polls give you different answers, and you have to emphasise in both camps of the more or less accurate," says John Curtice, professor of politics at the University of Strathclyde and Britain's most prominent psephologist.

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Ipsos MORI, which was formed in 1975 from the merger of Robert Worcester's MORI and the British branch of the French company Ipsos, remains the UK's largest research firm. But Yougov is growing fast. It expanded into America in 2007 when it bought the US company Polimetrix and now has 23 offices worldwide, in countries in Europe, Asia and the Middle East. Its ambition is clear, and both its employer ("What the world thinks") and mission statement ("It is our ambition to be a major force of continuous, accurate data and insight into what people are thinking and doing all over the world, all of the time, so that companies, governments and institutions can better serve the people that sustain them") have a slightly cutie air. The firm now has 5 "pens" of more than 100 members in the UK and Kellner receives reports from whom it selects a weighted sample of respondents for each poll.

Given its aims, I was surprised by how quiet its headquarters seemed – the building was 50 Street looks more like a fashionable block of flats than an office. Yet I later realised that the unattended desks in the room beyond Kellner's office were further evidence of Yougov's ambition: it had just taken over more floors in the block, partly to accommodate future expansion.

Kellner estimates that 60 per cent of Yougov's work is market research and only 10 per cent politics, though in this particular case the numbers are reversed. He used to have a 3-year stint under in the firm which, the Financial Times reported in 2007, was "the City's biggest hedge fund operator". Yougov's clients are mainly companies, however, after his sector became clear of the Cases of Lords in London Street's 22nd century in 2007 Jonathan Hamilton, the BBC journalist and presenter of the Today programme, also was given shares in YouGov when it was a mere 20 shareholder and still writes columns on its website. Kellner calls himself a "wage slave" although, it seems, he remains a co-owner, because he still receives shares when he sold his shares. "Few companies have moved into new territory with quite such spectacular success," said a profile in the Independent in 2006, under the headline "This sort of tea leaks really very bitter". It is not for what makes the company money, he adds: but he will not reveal what it does make, only to say that it's less than it was 20 years ago. Industry insiders suggest a figure of between £300 and £1,000 per pollsters per annum, depending on the number of hours they work.

Yet in a tax-free cities, small margins can have a big impact: the spike in Labour in late March briefly upset proceeds of a minority single-party government, the 3pm the Harold Wilson formed in 1974, leaving the other big parties with the choice of allowing it to govern or risking public displeasure by voting it down, triggering a long period of uncertainty. When we first spoke, Kellner suggested that "the ten days after the election might be an issue and psephologists will be in the eye-before". Now it seems that the uncertainty could last for months.

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