



Surveys and Society

Claire Durand

This chapter examines the interrelationship between surveys and society, i.e., how changes in the society within which surveys arose affect how they are conducted and how they in turn influence society. Society is, in the broadest sense, the survey sponsor, and it therefore defines the terms of the contract. It influences polls, defining not only the survey questions but also the means used to reach respondents and the conditions under which survey results are analyzed and published. However, the products and results of surveys – e.g., standardized questions, two-way tables of means and proportions – also influence society. They define what is learned and how it is presented to the general public.

The chapter examines the inter-influence between polls and society in four areas. It looks first at measurement, i.e., which questions are asked and how they are worded. It then goes on to examine data collection, data analysis, and the use of survey data. The chapter concludes with a review of emerging challenges in the ongoing process of adaptation between society and polls.

QUESTIONS, THEIR WORDING, AND THEIR CATEGORIES

Survey sponsors, be they academia, governments, the media, or private business, define which information they require to achieve their interests. Policy makers need information about demographics, attitudes, and opinions as well as behaviors in order to be able to plan their interventions. The questions that can be asked vary historically both within and between societies (Sudman and Bradburn, 2004). However, over the course of its development, survey research has also tended to set in stone the way questions are asked, and this had an impact on society.

Measuring Demographics

Demographics are seen as 'universal' factual information. However, the information that appears relevant changes along with society and differs among societies. The measurement process strives to fit individuals into

categories according to relevant concepts. For people to exist, statistically speaking, they must fit into some pre-determined category; falling into the 'other' category puts one in statistical limbo. If there is no category for same-sex partnership or for mixed origins, it is as if these realities do not exist in the public arena. At the same time, as some situations or conditions become common or visible enough, categories emerge to take them into account.

In social science, sex and age have been considered major determinants of attitudes. Younger people, for example, are considered to be more liberal or more concerned with the environment. But when does 'youth' end and 'adulthood' begin? In survey research, age is usually grouped into categories influenced by legal factors (age of majority, of retirement, etc.) and statistical considerations (i.e., categories must be large enough). These categories end up taking on a life of their own. Young people are defined as 18 to 24 years old, sometimes as 18 to 29, and occasionally up to 34. Old age starts at 65. With life expectancy increasing steadily, new categories emerge like the young-old (65–79) and the old-old (80+), for example.

Social class is currently measured using the concept of socioeconomic status (SES), a combination of income, education, and occupation. However, in countries where informal work is widespread, measures of ownership – of a house, a car, or a television – are used as measures of social class. Therefore, arriving at truly comparable measures of social class across countries is a tedious task.

In many countries, marital status categories now include 'separated or divorced' and 'living with a common-law partner'. In recent years, a category for living with or being married to a same-sex partner has appeared in some countries' censuses. In others, household composition may include more than one spouse. All of these categories appear or disappear in conformity with the norms of the societies where the questions are asked. However, questions about sexual orientation remain extremely difficult to ask in most countries.

The measure of ethnicity is not straightforward. Countries use widely varying categorizations to subdivide their population according to ethnicity; these include 'race', country of birth, ancestry, nationality, language, and religion (Durand et al., in press). Measuring ethnicity has been the focus of much writing and is not as simple as it may appear. First, categories that appear relevant in one country may be totally irrelevant in another. Second, the categories themselves are far from homogeneous. In the US, where skin color has been the main category used to classify people, 'black' encompasses recent immigrants of West Indian, Haitian, or African origin as well as descendants of former slaves. More recent immigration trends have led to the introduction of a new question on 'Hispanic/Latino' origin in the 1980 US Census, a category comprising Mexicans, Cubans, Central and South Americans, and Puerto-Ricans (Prewitt, 2014; Simon, 1997). Third, in most countries, the proportion of the population with multiple origins is rapidly increasing. In Australia and Canada, for example, it was around 10% in 1980. By 2006 however, it had reached more than 25% in Australia and 35% in Canada (Stevens et al., 2015). Fourth, respondents tend to change their declaration according to the context in which the question is asked (Durand et al., in press). Aboriginal people in the Americas provide a good example of this process, called 'ethnic drifting' (Guimond, 2003). In Canada, the number identifying as Aboriginal, i.e., either First Nation/North American Indian, Inuit, or Métis, has increased by 4.8% per year between 1991 and 2006 (Goldmann and Delic, 2014). Among those who identified solely as First Nation in the 2006 Canada census, 27.5% did not identify as such in 2001 (Caron-Malenfant et al., 2014). In addition, in both 2006 and 2012, around 30% of Aboriginals did not report the same self-identification in the Aboriginal Peoples Survey, as in the Census taken only six months before (Durand et al., in press). In the US, the number of people reporting 'American Indian' as their race more than

tripled between 1960 and 1990 (Nagel, 1995) and it increased by 9.7% between 2000 and 2010 (Norris et al., 2012). These examples testify to the fact that peoples' willingness to report a given ethnicity may depend on a number of factors, including the social image of the different ethnic groups in a given society.

Because of their breadth, censuses are where the necessity for new categories may first be noticed. Census data provide survey researchers with the information they need to compare sample composition with the general population in order to estimate and correct for biases. Therefore, surveys are dependent upon statistical agencies and their decisions, including their decisions concerning the categories they use.

The process of categorization creates and highlights groups of people. This can have either positive or negative impacts. People may or may not decide to identify with a given group for a number of reasons, one being the social image of that group (Prewitt, 2014; Simon, 1997). In the aftermath of World War II, countries like France, concerned with the possible impact of such categorizations, decided not to ask questions about origin or religion in their census.

Measuring Opinions and Behaviors

Opinion polls aim to measure public opinion. There are a number of assumptions at the foundation of this process, among them the idea that 'widely disparate or even idiosyncratic values can be expressed in standardized ways and that these expressions do not alter meanings relevant to decisions (Espeland and Stevens, 1998: 324). A primary goal of surveys is to classify people according to their opinions and behaviors on one hand and their characteristics and demographics on the other. When these two groups of measures are compared, a profile of potential 'clients' for political parties, social programs, and manufactured products emerges. To this end,

surveys have avoided natural language and open-ended questions in favour of a specialized dialect (Smith, 1987), i.e., instead of 'What do you think of your government?', they ask 'Are you very satisfied, somewhat satisfied, not very satisfied or not at all satisfied with your government?'. This process is essential in order to compare answers to survey questions with one another.

Standardization means that every single concept that the survey aims to measure must be translated into this survey questionnaire 'dialect'. The need for standardization gave rise to typical formats such as the Likert scale of agreement. People became accustomed to these formats and learned to answer using them. Concepts such as satisfaction, agreement with a policy, or interest in a topic are now naturally linked to standard response formats in people's minds.

Standardized formats appear to make all questions simple and easy to ask, but this apparent clarity tends to oversimplify issues. Complex issues such as war strategies, protection of individual rights, or immigration policies require much information and thought. Yet they are nonetheless translated into short questions, which respondents must answer using a response scale with a limited number of response options. Political stakeholders then use these survey results to justify their policies. This is where opinion polls are vulnerable: they are influenced by current socio-political debates and dependent on the interests of political actors. In these cases, different polls on the same topic may generate different results due to question wording or question order, supplying ammunition to critics who say that polls can be manipulated to say anything.

COLLECTING DATA: MULTIPLE MODES, MULTIPLE BARRIERS

The conduct of surveys is dependent on available resources within a society. In general there are three fundamental requirements: a

universal means of communication with respondents, availability and access to coordinates from which to select and contact them, and the willingness of respondents to participate. Availability of various means of communication has varied over time and between countries. However, the process by which survey researchers try to access respondents, along with the reaction that emerges to block this access, appears to be a universally prevalent cat-and-mouse game. As new means of communication develop, so do ways to protect respondents from unwanted intrusion.

Surveys Using the Interview Mode

Surveys may be carried out by interviewers, who contact respondents, convince them to participate, and ask them questions. Initially, surveys using the interview mode were mostly conducted face-to-face. People were selected at random within areas, based on a number of criteria, and asked to complete a survey. This meant that it was feasible to knock on peoples' doors or stop them in the street, and that most people would kindly answer the questions they were asked. Face-to-face is still the preferred mode of data collection for many national statistical agencies and in countries with either a small territory and dense population or that have difficulty accessing the whole population by other means. However, in many countries, apartment buildings are now equipped with security devices, making it very difficult to reach people who live in these types of dwellings.

In countries with large territories and a dispersed population, face-to-face surveys are very costly; as soon as telephone use became widespread, it was quickly adopted as almost the sole mode for conducting surveys. Initially, directories were used to select sample members; however, it soon became possible for people to have their telephone number unlisted to avoid being bothered by unwanted phone calls. Researchers Warren Mitofsky and Joseph Waksberg developed

random digit dialing (RDD), to select any telephone number, listed or not (Montequila, 2008). However, when households began using more than one telephone line, any of which could be selected using RDD, it became more difficult to estimate any given respondent's probability of inclusion and to produce statistically reliable results.

In recent years, mobile telephones have emerged and spread very rapidly. As of 2013, in developed countries, there was already more than one mobile phone subscription per person and in the developing world, mobile penetration was estimated at 89%, and in Africa at 63%. (<http://www.internetworldstats.com/mobile.htm>). With mobile phones, sampling frameworks change from being household-based to individual-based. In developed countries, where frameworks for mobile and landline telephones must be used concurrently, it therefore becomes difficult to estimate any given person's probability of inclusion, taking into account the relative use of each telephone to which that person has access. To get around this problem, other means have appeared, such as address-based sampling, which aims to create lists that contain each household only once. However, in most developing countries, the emergence of mobile phones as a widespread means of communication has created new opportunities for survey research in areas where most surveys could previously only be conducted face-to-face.

But sampling and cost are not the most difficult challenges faced by telephone surveys. As technology makes it easier to reach people, other technologies such as answering machines, voice mail, and caller ID allow people to decide whether or not to answer incoming calls. The result is that as people become easier to reach, it is likewise easier for them to avoid being reached.

Self-administered Surveys

Self-administered surveys avoid social desirability bias, which can occur when an

interviewer is present, and they are preferable when asking sensitive or threatening questions (Sudman and Bradburn, 2004). Survey questionnaires can be printed and sent by mail; however, in many countries, the lack of complete mailing lists for the entire population or privacy laws making it difficult to build such lists mean that mail surveys are not practical for surveying the general population. For this reason, they have been primarily used either to survey specific populations or by government departments or other organizations that have access to such lists.

In recent years, the Internet has emerged as an alternative method for conducting self-administered surveys. Though it has not yet become a universal means of communication, by 2015, over 88% of the population in North America and 73% of the European and Oceanian population had Internet access. Penetration had reached over 50% in Latin America and in the Middle East, 40% in Asia and close to 30% in Africa (<http://www.internetworldstats.com/stats.htm>). It is foreseeable that bias due to incomplete coverage may soon become negligible in most countries (Traugott, 2012). Like mail surveys, web surveys face the problem of building a sampling frame. Two solutions have emerged. One is to use telephone or mail surveys to recruit respondents to take part in panels for a limited period of time; Internet access is then provided to respondents who do not already have access. This framework is probabilistic in essence but very costly. The other solution is to recruit a convenience sample through various means, including websites where respondents may sign in. The latter is much less expensive, so that in small markets where cost is a main factor – small countries and sub-national constituencies – most electoral polls are now conducted using this method, called 'opt-in' web surveys. Of course, if and how these opt-in surveys or access panels may be representative of the general population is subject to much debate (Traugott, 2012).

Web surveys are a non-intrusive, flexible, and inexpensive way of inviting people to

answer self-administered surveys. Like mail surveys, they have the advantage of allowing people to complete a survey when it is convenient to do so; but in the absence of pressure to answer, these surveys have difficulty reaching acceptable cooperation rates (Durand, 2014). However, as email becomes a main means of communication, some countries have passed laws requiring organizations to get prior approval to contact someone by email if they do not already have a relationship with that organization. Such laws will likely affect pollsters' ability to use the Internet to conduct surveys.

Very recently, interactive voice response (IVR) – where people are contacted by recorded voice message and answer using the telephone keypad – has developed as an alternative for short surveys or as a complement to classical telephone surveys. This technology gets around the increasing cost of paying interviewers and avoids the possible social conformity bias associated with interviews. It may be used during classical telephone interviews to switch to questions that might be threatening or that are prone to social desirability biases, such as vote intention. The spread of mobile phone technology also allows for self-administered surveys by SMS. However, in some countries such as the U.S., robo-calling cell phones, which is required by IVR technology, has been prohibited.

Finally, it was thought that social media might become another means to conduct surveys, but social media providers soon blocked any attempts to send bulk requests, regardless of the sender. In short, with each new method of reaching people, new barriers have arisen to protect people from unwanted intrusions. The 'right not to be bothered' has become an integral part of modern life.

THE CHOICE OF STATISTICS AND THEIR IMPACT ON SOCIETY

Once collected, data must be made available in a timely fashion and presented in a way that is both accurate and understandable by

end users. The availability of survey data has made it possible to build archives, which can be used for innovative research, both historical and contemporary. Technological changes have influenced these capabilities, but 'just in time' availability of survey data has also changed how societies operate.

Availability of Data Archives

Thousands of surveys have been conducted since the emergence of survey research. Some of these surveys have been archived and may be retrieved from a number of public or academic sites. In some cases, they can be analyzed using web-based software available on-site. As a result, in some countries it is possible to monitor changes in public opinion on topics such as capital punishment, euthanasia, trust in institutions, or on certain major political debates, going as far back as the 1950s or 1960s. These archives also allow comparisons to be made between countries, an endeavor that would have been almost impossible before the emergence and dissemination of polls (Lagos, 2008; Mattes, 2008). In trying to understand social changes and how various events have impacted these changes, survey archives constitute a mine of information that can help put survey results in perspective for the general public and can contribute to public debate. Initiatives like the Barometers – Euro Barometer, Latino Barometro, Arab Barometer, Asia Barometer, and Afro Barometer – the World Values Surveys and the International Social Survey Programme allow for international comparisons of change over time for similar opinions and attitudes.

In recent years, data gathered by statistical agencies – including censuses – have been made available to researchers in many countries. These initiatives to democratize access to data also open windows for new and more sophisticated analyses that will help build a more comprehensive understanding of social change. For instance, census data may signal the emergence of new social phenomena,

such as the growth of couples of mixed ethnicity, new types of family units, or changing income distributions within households. This shows the way for what surveys will have to take into account in the future.

Analysis of Survey Data

Technology has not only changed how surveys are administered, it has also facilitated data recording and analysis. Except for mail surveys, data collection is now usually computer-assisted and recorded concurrently. This gives very quick access – sometimes in real time – to survey results. Once data become available, however, they must be analyzed. Data analysis has gone from hand compilation to the use of mainframe computers accessible only to a few specialists to the current use of user-friendly – and increasingly free and open access – software for microcomputers. Meanwhile, the presentation of survey results has become automated and standardized in the form of tables showing the distribution of the main variables of interest and tabulations of these same variables with relevant demographics.

While these products help to reveal the specific situations of various social groups, they also contribute to shaping and 'setting in stone' the images of these groups (Desrosières, 2002). This process creates an essentially homogenous portrait of various groups, in which the emphasis is placed on average characteristics, behaviors, or attitudes, not on heterogeneity and diversity (Espeland and Stevens, 1998). For instance, all women tend to be seen as earning less than men, all young people as less interested in politics than older people, and all poor people as unemployed. In this respect, survey data have helped put flesh on the bones of social categories. Members of different social groups are trapped in the images that surveys attribute to them, and it is difficult for members of disadvantaged groups to free themselves from their associated stereotypes.

Data analysis has also been used to justify *a priori* positions. For example, factor analysis has been used in the debate on whether intelligence is a one-factor or a two-factor concept (Gould, 1996). The one-factor theory gave rise to most of the Intelligence Quotient (IQ) tests. Herrnstein and Murray (1994) used a sophisticated statistical apparatus to justify a racial theory of intelligence, a theory that has been much criticized, notably by Gould (1996).

THE USE OF SURVEY RESEARCH

The relatively low cost of polls and the timely availability of poll results has contributed to making polls ubiquitous in the socio-political sphere. Political stakeholders request poll results, and polls may also be pushed on political actors by various socioeconomic interest groups.

Electoral Polls and Their Influence

Knowing peoples' opinions is of no use unless one wants or needs to take them into account. Polls go hand in hand with parliamentary democracy, and as democracies emerge in most parts of the globe, so do opinion polls (Blondiaux, 1998; Lagos, 2008; Mattes, 2008). One of the most publicly known uses of surveys is the electoral poll. With technological advances, it has become possible to conduct polls and access the results in a matter of hours. The end of the twentieth century saw a proliferation of polls conducted over short periods of time and published right up to the end of the electoral campaigns. The availability of poll results has changed the way electoral campaigns are conducted. In countries where the head of state or prime minister decides when the election is called, polls can also influence the timing of election launches.

Polls have taken an important role in election campaigns, as they prompt political

stakeholders to adjust their campaign discourse based on 'public opinion'. They sometimes serve as a criterion to decide whether a candidate will be invited into an electoral debate. They may also influence party activists, galvanizing or demoralizing them depending on poll results. From the very first use of polls in electoral campaigns, the notion that they may influence voters' choices or turnout has been an issue (Gallup and Rae, 1940). Though this possibility is commonly held as true by political stakeholders, the media, and voters, evidence that polls regularly influence voters, strongly enough to change election outcomes has yet to be found (Hardmeier, 2008). However, polls are not always accurate. As of 2010, the academic literature has documented nearly 50 instances of polls going wrong (Durand et al., 2010), and new instances have appeared regularly since then, such as in US primaries, provincial elections in Canada, and general elections in Israel, Great Britain, and Austria. Researchers have sought and are still seeking to determine why such situations occur. Were these polls really inaccurate, or did people simply change their minds at the last minute or fail to show up, in part because of poll results? The question of the inter-influence between poll results and the course of electoral campaigns is still an open question.

Election polls have also been important for methodological reasons. Elections are almost the only situation where polls can be compared with what they aim to measure, i.e., the vote. Consequently, electoral polls constitute an essential tool for estimating poll bias, and research using these polls has led to significant improvements in survey methodology.

Opinion Polls, Surveys, and Public Policy

'Just in time' poll results have helped define a new socio-political environment in which politicians and pressure groups alike must take public opinion into account and try to

use it to advance their own agendas. The emergence of polls has placed a new burden on all political stakeholders to sway public opinion in favor of their positions if they are to achieve their goals (Blondiaux, 1998).

This raises a number of questions. For instance, do polls create public opinion or do they measure existing opinions? Sometimes surveys ask questions that are not current topics of public debate and about which people may not have all the information necessary to take an enlightened position, or that pertain to topics which may need advanced technical knowledge to comprehend. To what level should public opinion be called upon in political decisions on specific issues, and how can it be reliably measured? This is a key question in the interaction between society and surveys.

The principle behind representative democracy is that those elected act on behalf of the people they represent, work through the information provided concerning a given project or policy, and decide what they feel is in the best interests of their electorate and of the country as a whole. The emergence of polls has changed the way representative democracy works (Blondiaux, 1998). Many countries have experienced clashes between public opinion and the protection of minority rights – issues like gay rights; the right to wear religious garb such as yarmulke, turban, or hijab; or the right to build minarets. Who should prevail when minority rights clash with majority opinion? In most of these debates, polls have played and still play a role in the arguments political stakeholders advance in support for their positions.

FUTURE DIRECTIONS

How surveys are and will be conducted depends on each country's situation, history, territory, population density, and composition, along with its socio-political and technological development. As democratic movements emerge around the world, surveys and polls

spread and become tools in the hands of political leaders and governments, but also of the population itself.

In a complex world, what are the questions that can and should be asked? Is it possible to convey the complexity of all social challenges using simple survey questions? Pollsters and survey researchers must learn how to assemble pools of questions that give a reliable image of the real 'pulse of democracy', as Gallup put it.

To understand the impacts of globalization and the changes brought about by demographic diversification, our approach to demographics must be reviewed in order to understand which demographic categories, if any, are now related to individual opinions, attitudes, and behaviors, and why. Will categories change or become useless? Is it possible that in the near future, none of the demographics that were once related to people's answers will maintain their relationships? It will be a challenge to determine new predictors of people's opinions and eventually, of their voting behaviour or of other kinds of behaviour.

Changes in data collection methods are reminders that opinion polls and surveys require cooperation from their subjects and from society as a whole. There is no such thing as an intrinsic right to communicate with a perfect stranger, whatever good reasons pollsters may think they have for doing so. Survey research is being conducted in an environment in which the means available to avoid communication are increasing at the same pace as the means available to communicate with potential respondents. What is the future of survey research if there is no access to survey respondents?

The current situation has not occurred overnight and for no reason. Credibility is essential to gaining respondent cooperation, and surveys may have lost some public credibility. People receive too many requests, they are required to answer questionnaires that are often too long and not always well constructed, and they are asked to answer at the

exact moment they are contacted. How can survey researchers convince people to cooperate? New methods are being developed that make use of panel designs and that request cooperation for a limited number of surveys over a limited period of time, for instance in some of the web surveys using probabilistic sample frameworks. Research is being done on multimode surveys that allow people to answer using their preferred mode (Dillman et al., 2014). At the same time, making survey results more accessible and usable in people's lives would help surveys and polls regain credibility and encourage people to take part in them.

All the tools needed to perform more sophisticated data analysis that would provide access to information about variations in opinions and behaviors are readily available and accessible. Established standard methods of presenting results can be misleading. For survey research to be useful to the general public, data analysis must move away from simple, if not simplistic, tables and toward more refined analysis. New standard products may emerge that combine advanced statistical procedures with technology that facilitates visual presentation in the form of figures and graphs to convey the complexity and diversity of modern society in an easy-to-understand fashion.

Archives of survey data are an excellent tool for tracking social change. However, such archives have not been established in all countries and are far from comprehensive. Creating such archives is a vital endeavor, one that must be accomplished before too much data disappear. These archives are the foundation upon which future historians will base their understanding of the last century. To make full use of the data they contain, research is required to facilitate the combination of sources that measure similar concepts in different ways.

Finally, what is and what should be the role of surveys in society? Political stakeholders and the general public alike are still in the process of learning when polls are likely to

be useful and reliable and when they are not. One thing is certain: surveys and polls are here to stay, and we are still discovering new ways to conduct and use them.

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- For those who read French, a social history of the emergence of public opinion polls in the US and in France can be found in Blondiaux (1998).
- Desrosières (2002) provides a great synthesis of the history of statistics tracing the relationship between the states and the production of statistics that both influence decision making and are influenced by its process.
- Dillman et al. (2014) is a major text combining theory and practice of surveys, including how to take into account the social context in which they are conducted.
- A history of commensuration as an instrument of social thought and as a mode of power and its influence on sociological inquiry can be found in Espeland and Stevens (1998).
- First published in 1981 and updated in 1996, *The Mismeasure of Man* by Gould (1996) demonstrates how statistical analysis has been used to justify biological determinism.

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Defining and Assessing Survey Climate

Geert Loosveldt and Dominique Joye

INTRODUCTION

In Wikipedia, the Internet encyclopedia, climate is defined as:

a measure of the average pattern of variation in temperature, humidity, atmospheric pressure, wind, precipitation, atmospheric particle count and other meteorological variables in a given region over long periods of time. Climate is different than weather, in that weather only describes the short-term conditions of these variables in a given region. (<http://en.wikipedia.org/wiki/Climate>, accessed January 29, 2014)

This classical climatological definition reveals the basic characteristics of a climate: it refers to average values of different aspects, it is regional and only observable over a longer period. It differs from temporary weather. What does this general definition of climate mean to describe in terms of the survey climate, and why do survey researchers need information about the survey-taking climate? The definition of climate makes

clear that the survey climate is not an individual characteristic but refers to the general context and that at least measurements of several aspects over a longer period must be taken into account to describe the survey climate. Just as normal climatological conditions affect (among other things) the kind of crops that are suitable in a particular region, the survey climate determines the design and efforts needed to implement surveys in an adequate and efficient way and to obtain high-quality data. When most people are reluctant to share personal information and communicate with external agencies, it will require much effort to collect personal data. Interviewers should also be aware about the survey climate conditions in which they will have to work. Should interviewers be prepared for a hostile environment, or can they expect a generally warm welcome? Therefore, information about the survey climate is also relevant for the training of interviewers. In the context of cross national surveys, the survey climate makes clear that in some