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BEYOND THE HORSERACE: A DEEPER LOOK AT OVERALL SHIFTS IN PARTY CONSTITUENCIES SINCE THE LAST ELECTION

*SHORT TERM STABILITY MASKS MAJOR LONGER TERM DETERIORATION IN GOVERNMENT
POSITION AS UNHAPPINESS WITH DIRECTION OF COUNTRY OUTSTRIPS HAPPINESS*

[Ottawa – July 13, 2012] – Although the horserace polling has been less frenzied than in 2011, there have been a number of polls out suggesting shifts in voter intention and why these might be occurring. In this release, we try and take a more macro perspective as to what has changed since the last election and drill down to identify exactly where those movements have occurred. We do not think the week to week movements are meaningful at this stage and we also believe that much of the narrative explaining these putative shifts is mostly conjecture rather than empirically driven conclusions. In this analysis, we are going to argue that the shifts, while meaningful, are modest. We also argue that the most significant movement has been a significant erosion of the Government's position since they secured a majority last year. We will link this to broad directional measures of confidence in the Government and the Country.

Our main contribution here is to assemble roughly 4,000 cases (a random probability sample which includes on and off line Canadian's and land line and cell phone only respondents). We are going to take a look at where the 2011 voters have moved and where the current supporters have come from (not exactly the same thing). The two large samples conducted over the past few weeks are also very useful for showing how the party's current constituencies are arrayed, how stable the current patterns are (unsurprising in the midst of the summer and distant from an election) and what the real regional patterns are and how those have changed from the last election.

Our most recent poll shows a remarkable level of stability from the last poll. The high degree of intersubjective repeatability of results (the main parties are all within less than one point difference of each other) shows that the methodology is highly reliable (a canon of good measurement). It also shows a strikingly placid voter landscape. This is not surprising in a period where an election is very distant and the public are more concerned with cottages and BBQ's than a non-existent horserace.

HIGHLIGHTS

- **National federal vote intention*:**
 - ☒ **32.3% NDP**
 - ☒ **30.2% CPC**
 - ☒ **19.5% LPC**
 - ☒ **10.0% Green**
 - ☒ **4.9% BQ**
 - ☒ **3.1% other**

- **Direction of country:**
 - ☒ **44.6% right direction**
 - ☒ **45.8% wrong direction**
 - ☒ **11.7% DK/NR**

- **Direction of government:**
 - ☒ **35.4% right direction**
 - ☒ **54.5% wrong direction**
 - ☒ **10.2% DK/NR**

**Decided and leaning voters only. Our survey also finds that 13.2% of Canadians are undecided or ineligible to vote.*

Please note that the methodology is provided at the end of this document.

Despite the stability of the current landscape, the comparison to May 2nd election results shows some rather important trends. There are really only two notable changes in party position since the election. The first and by far most important trend is the steady and profound erosion of Conservative support since May 2nd. The Government is hovering at or below 30 points, and has lost roughly one in four of all voters who supported them in the last election. One would have to go back to the 1988 Mulroney government to find another majority government which has experienced such a precipitous fall from grace only a year or so out of achieving office. While not suggesting the sort of historical pratfall that occurred in the next election for that government is in the cards for this government, this cannot be considered an auspicious indicator. Moreover, there is little evidence that this decline has been driven by a single issue or even a couple of issues. The steady pattern of decline, coupled with a serious drop in confidence in both national and federal government direction may suggest that the decline is rooted in growing fatigue with the overall management “style” of this government (especially considering that the economy has improved – or at least stabilised – and we are certainly faring much better than Europe).

Another second trend is the recent surge in Green Party support. The Green Party has more than doubled their support since the last election and now stands at 10 points. Although some polls have pegged the Green Party well below our numbers, we are confident in our numbers for two reasons. First, when these other polls ask respondents who they intend to vote for, they often do not prompt respondents with the Green Party as an option, opting instead to lump them in with the “other” option. Second, these other polls often exclude cell phone only households, a group which is consistently more likely to support the Green Party.

We offer three possible explanations for the Green Party’s rise in support:

- 1.) There is growing fatigue with traditional political parties (perhaps reinforced with Mulcair rebuffing cooperation scenarios?);
- 2.) Elizabeth May’s rather spunky performance in Parliament and national scene is catching attention of voters; or
- 3.) The environment, which was the dominant issue five years ago, is on the march to pinnacle status again.

Some argue that these Green Party numbers are inflated because the party fails to deliver these votes on Election Day. Our response to this is that the fact that young citizens are much more likely to be Green supporters and those young potential voters are much more likely to not vote does not justify incorrect reporting of what all eligible voters believe at the time of the poll. Our research suggests that there is some measurement error as people select and over remember voting Green. This over-reporting may be due to social desirability bias, but this effect is modest (about two points). Interestingly, it may be the case of a reverse modest under-reporting of Conservative support.

This is not simply an arid methodological dispute. Recognizing and recording the views of all eligible voters, particularly younger voters who are less likely to vote is important. Incidentally, this methodological and democratic problem would be solved by mandatory voting. Given the

improbability of that occurring we put forward another more plausible concept based on these findings.

The erstwhile Natural Governing Party of Canada – the Liberal Party, meanwhile, is mired in a historical slump which if it continues or worsens could well spell the death of that venerable party. The newly muscular NDP, led by Thomas Mulcair, shows little interest in a deal with the Liberals; they appear more content to hope they go the way that Peter Newman has predicted. Yet Canadians, before the advent of the Conservative Party, have opted for center moderate parties such as the Liberal Party (and Brian Mulroney's PCs fell into this category as well). It might therefore be prudent to retain such an option in a viable form for voters. A new party might satisfy this requirement, but a worthwhile idea might be some form of merger between the Liberals and the Greens. This would be a much lower cost proposal than merging the NDP and the Liberal Party. It would immediately create a third party with very similar heft to that of the other two parties and provide that new party with strongest access to under 40 Canada. The analysis of mobility across parties and attitudinal profiles suggest this is not an unnatural union. With Elizabeth May punching well over her weight in a listless parliament receiving raspberries from the public, a new merged red and green party with a fresh Liberal leader could be a very interesting option for future voters

CHANGES IN CORE CONSTITUENCIES FOR THE PARTIES: ANALYSIS OF REGION, DEMOGRAPHICS AND VOTER MOBILITY

Regional patterns are largely stable, though the NDP appears to have picked up support in Ontario and lost support in Quebec. Other provinces show signs that the Conservative Party may be losing ground to the NDP, but the relatively small sample sizes in these regions limit the robustness of the results.

The demographic patterns are very interesting. If voting were limited to seniors, the Conservative Party would enjoy a strengthened majority. A recent CBC poll, however, touted the fact that the NDP now held an upper hand with seniors and that this was a crucial change. While we agree that the senior vote is crucial by virtue of their growing share of the overall voter market and their very high voting rates, the question used to support this conclusion is not a reliable indicator of this important issue. Some respondents may think the NDP is "better positioned" to deal with the needs of seniors but much more tellingly, seniors themselves continue to be staunchly supportive of the Conservatives, not the NDP.

By contrast, if voting were limited to youth, we would be looking at an NDP government with Conservatives and Greens vying for Official Opposition. These patterns present a serious problem for the NDP. Much of their support is concentrated among youth – a group with a particularly low propensity to actually vote come Election Day. Conservatives, on the other hand, lead with seniors, a group that consistently votes in overwhelming numbers.

For the first time in our tracking since the height of the Sponsorship Scandal, there are more Canadians unhappy with broad national direction than contented. Moreover, the near parity of

those who were split as to whether the direction of the federal government was moving in the right or wrong direction has perilously collapsed to the point where the unhappy are approaching a two to one wrong lean. In both cases, there is no single spike or incident which appears to have fostered this serious erosion on outlook on the government and the country. It appears this is more rooted in general fatigue with a style of governing which is increasingly grating on the Canadian public.

Lastly, we turn to the issue of voter mobility. In this study, we asked respondents how they voted on May 2nd and we compare their responses to their current vote intention. The patterns are very interesting. In particular, the vast majority of current Conservative supporters (82 per cent) say they voted Conservative in the last election. These patterns suggest that the party has failed to draw new supporters from other parties; instead, it has been whittled down to its most loyal constituencies.

Looking at the center left parts of the political spectrum, however, we see a very different pattern. More than one-fifth of those who voted NDP in 2011 have defected to the Liberals and Greens. One-third of Liberal voters, however, have shifted to the NDP and Green Party. The Green Party has lost similar numbers of voters to both the Liberals and the NDP. These patterns suggest that while Conservative Party supporters are strongly committed to their party, there is a great deal of fluidity on the center left, where party supporters will more readily move to other parties. This churning is probably a reflection of lower levels of emotional engagement and less firmly rooted connections and views of the center left options. It underscores a formidable and continued Conservative strength which produces higher levels of voter turnout, greater fundraising, greater loyalty and a better volunteer ground game. A simple numeric analysis of current voter intention significantly understates true Conservative strength.

In short, Canada seems to have divided itself into two camps – Conservative supporters and non-Conservative supporters. This trend suggests that the NDP, Liberal Party, and Green Party supporters have more room to grow, but growth in one of these parties will come at the expense of cannibalising the other two. The Conservative Party, in contrast, has no readily available source of new supporters, but enjoys a much higher level of loyalty and commitment among its current supporters. We speculated how a Liberal-Green merger might produce a newly balanced tripartite set of choices which may find appeal among disillusioned under 40 voters.

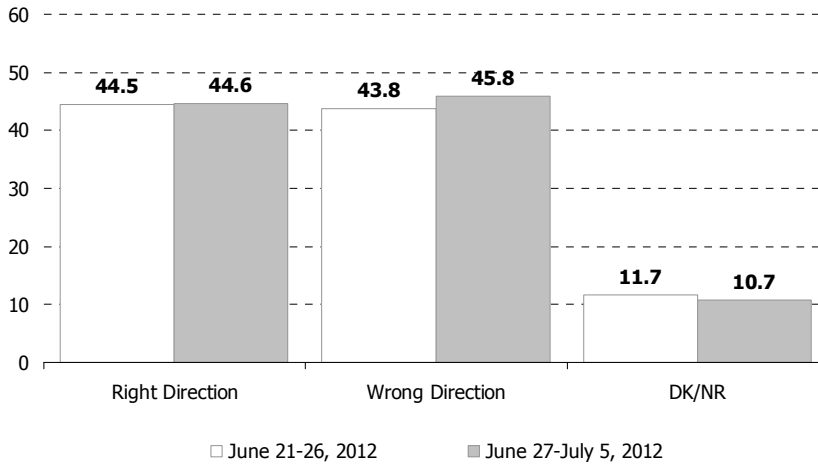


Top Line Results:

Direction of country



Q. All things considered, would you say the country is moving in the right direction or the wrong direction?



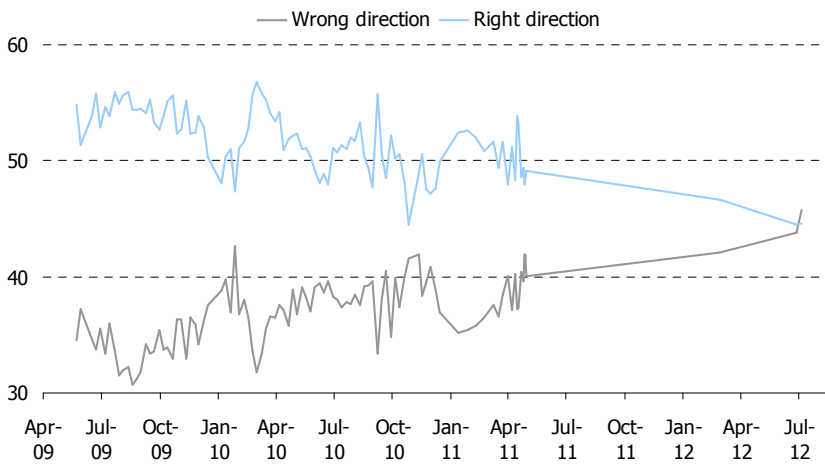
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BASE: Canadians; June 27-July 5, 2012 (half-sample) (n=1,014)

Direction of country



Q. All things considered, would you say the country is moving in the right direction or the wrong direction?



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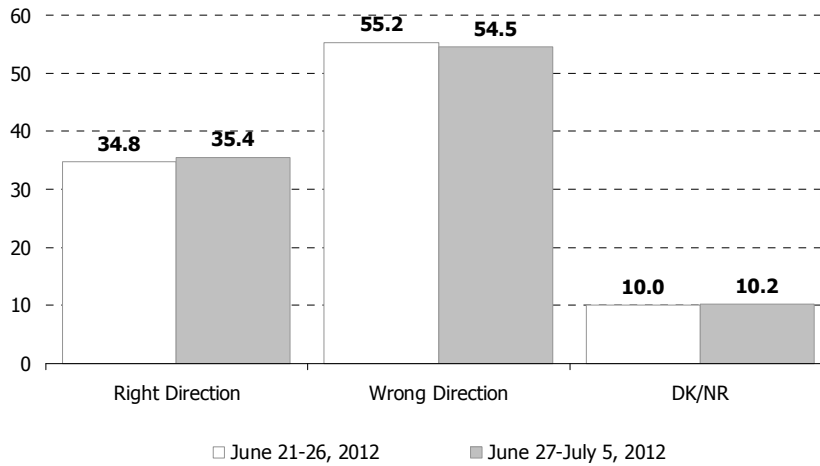
BASE: Canadians; most recent data point June 27-July 5, 2012 (half-sample) (n=1,014)



Direction of government



Q. All things considered, would you say the Government of Canada is moving in the right direction or the wrong direction?



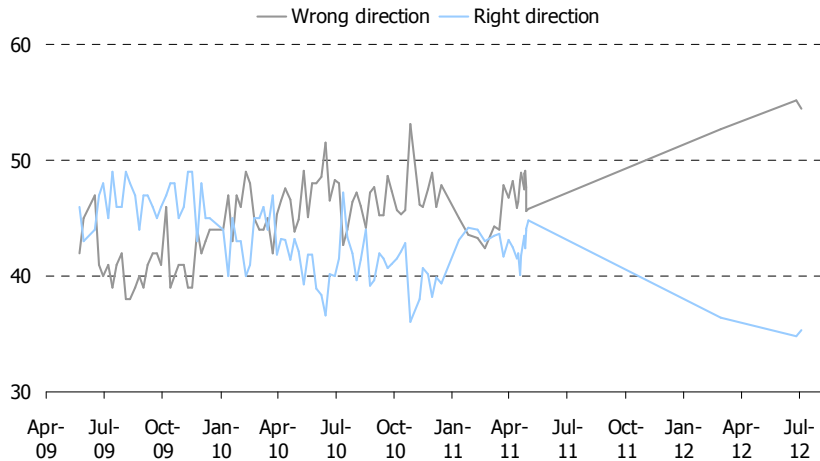
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BASE: Canadians; most recent data point June 27-July 5, 2012 (half-sample) (n=1,084)

Direction of government



Q. All things considered, would you say the Government of Canada is moving in the right direction or the wrong direction?



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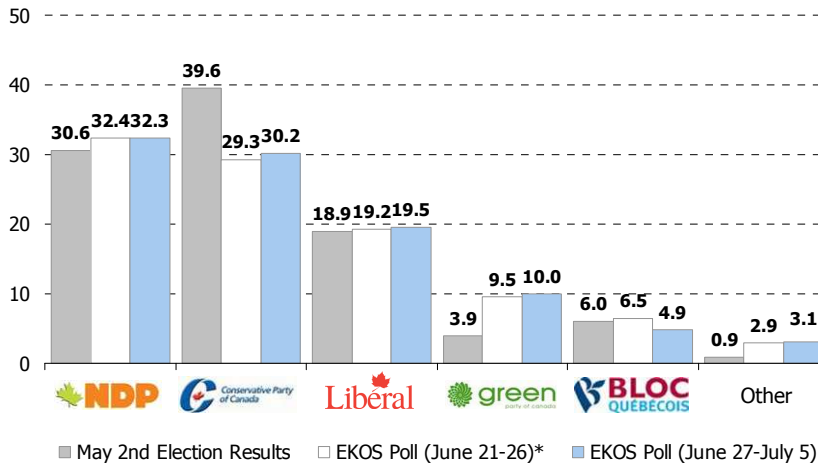
BASE: Canadians; most recent data point June 27-July 5, 2012 (half-sample) (n=1,084)



Federal vote intention (includes leaning)



Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 13.2% of Canadians are undecided/ineligible to vote.

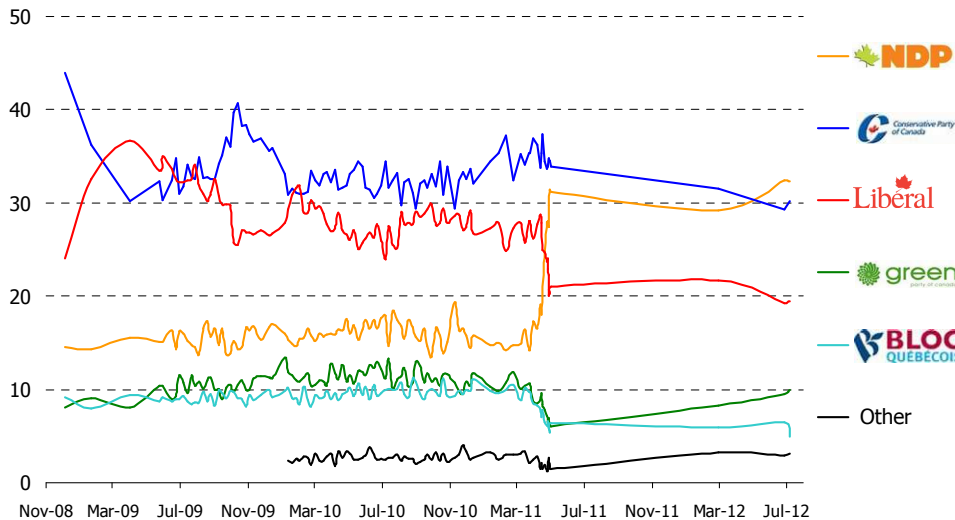
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BASE: Canadians; June 27-July 5, 2012 (n=2,098) / *June 21-26, 2012 (n=2,049)

Tracking federal vote intention



Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 13.2% of Canadians are undecided/ineligible to vote.

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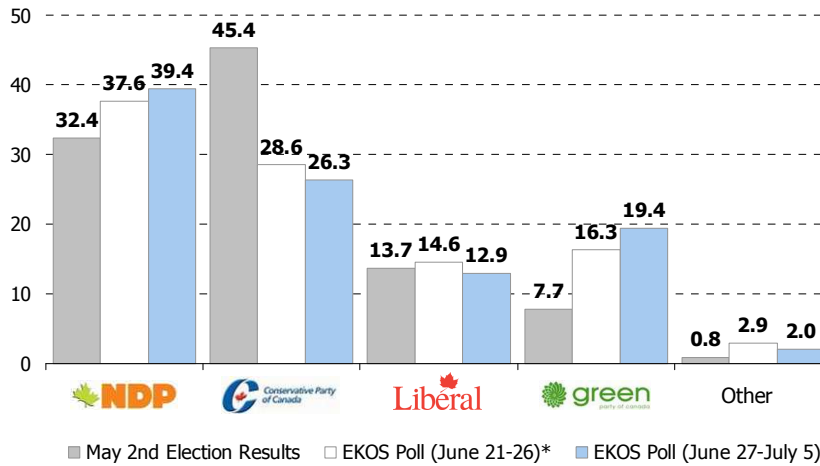
BASE: Canadians; most recent data point June 27-July 5, 2012 (n=2,098)



Federal vote intention – British Columbia



Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 8.6% of British Columbians are undecided/ineligible to vote.

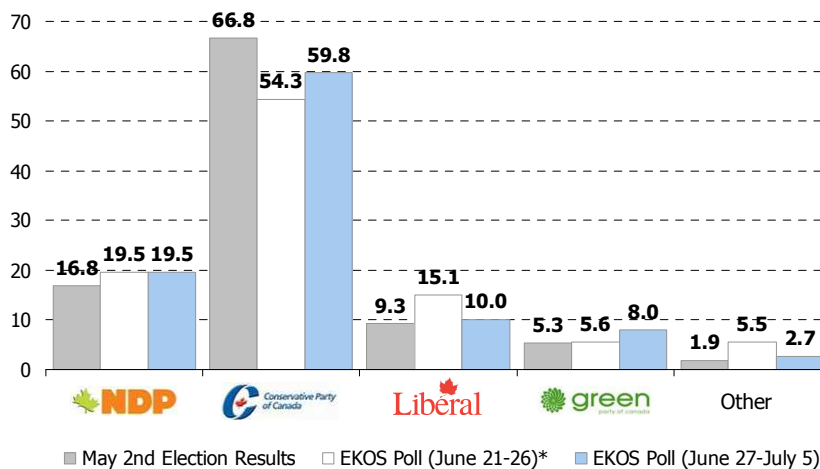
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BASE: Residents of British Columbia; June 27-July 5, 2012 (n=169) / *June 21-26, 2012 (n=307)

Federal vote intention – Alberta



Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 15.8% of Albertans are undecided/ineligible to vote.

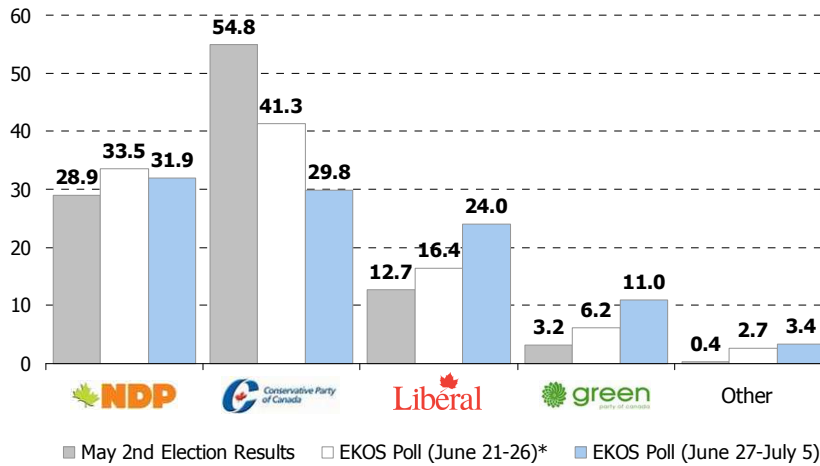
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BASE: Residents of Alberta; June 27-July 5, 2012 (n=133) / *June 21-26, 2012 (n=255)



Federal vote intention – Saskatchewan/Manitoba

Q. If a federal election were held tomorrow, which party would you vote for?



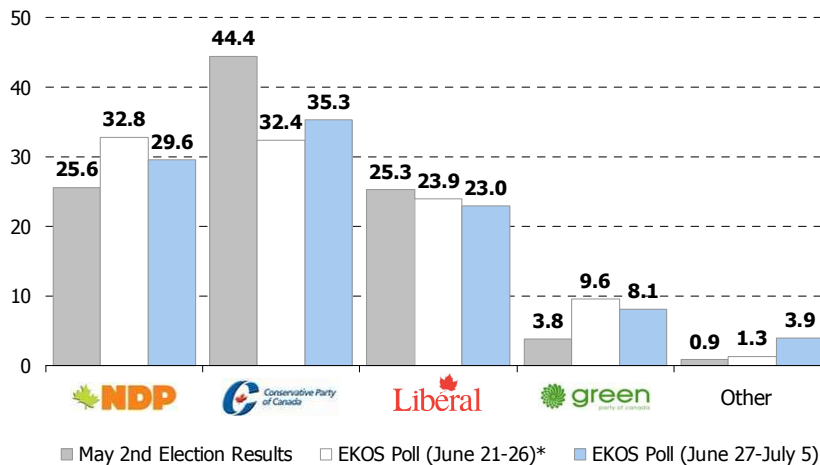
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 11.2% of Saskatchewan and Manitoba residents are undecided/ineligible to vote.

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BASE: Residents of Sask./Man.; June 27-July 5, 2012 (n=63) / *June 21-26, 2012 (n=194)

Federal vote intention – Ontario

Q. If a federal election were held tomorrow, which party would you vote for?



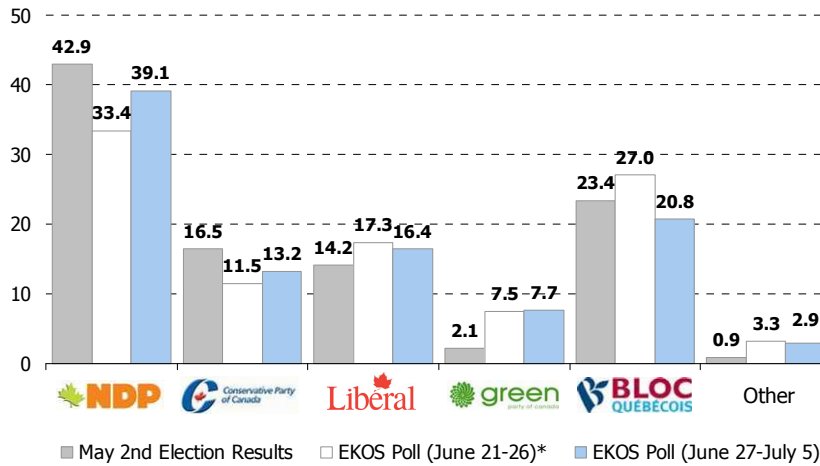
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 12.4% of Ontarians are undecided/ineligible to vote.

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BASE: Residents of Ontario; June 27-July 5, 2012 (n=933) / *June 21-26, 2012 (n=717)

Federal vote intention – Quebec

Q. If a federal election were held tomorrow, which party would you vote for?



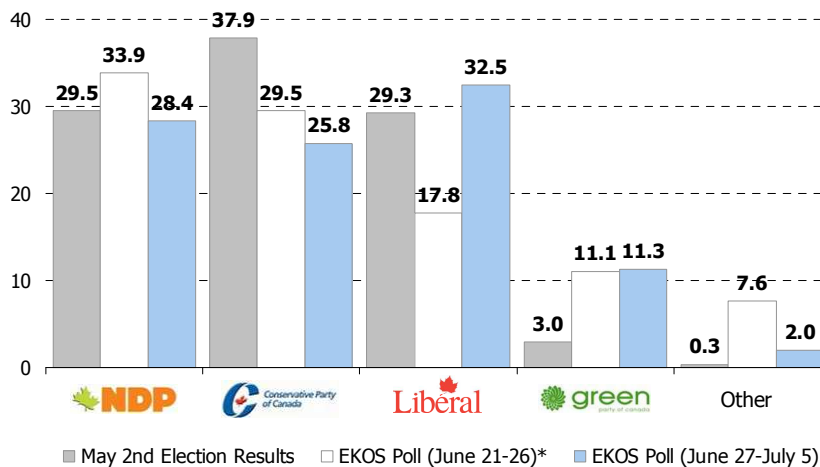
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 16.2% of Quebecers are undecided/ineligible to vote.

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BASE: Residents of Quebec; June 27-July 5, 2012 (n=667) / *June 21-26, 2012 (n=464)

Federal vote intention – Atlantic Canada

Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 14.3% of Atlantic Canadians are undecided/ineligible to vote.

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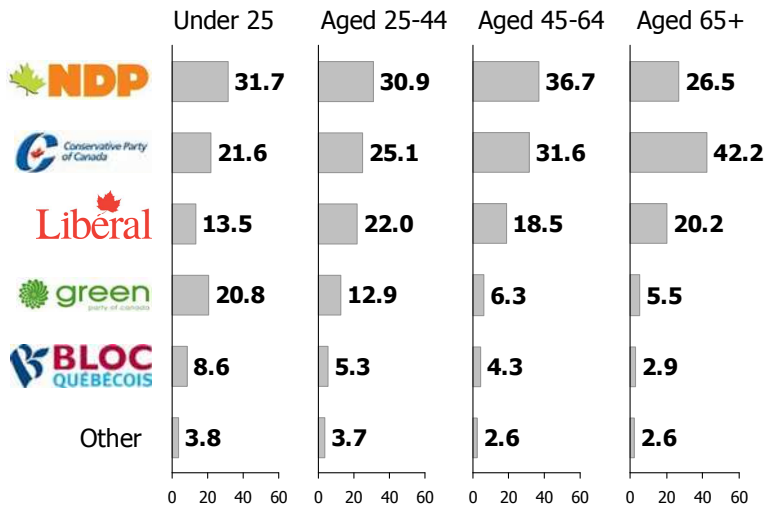
BASE: Residents of Atlantic Canada; June 27-July 5, 2012 (n=133) / *June 21-26, 2012 (n=112)



Federal vote intention by age group



Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 13.2% of Canadians are undecided/ineligible to vote.

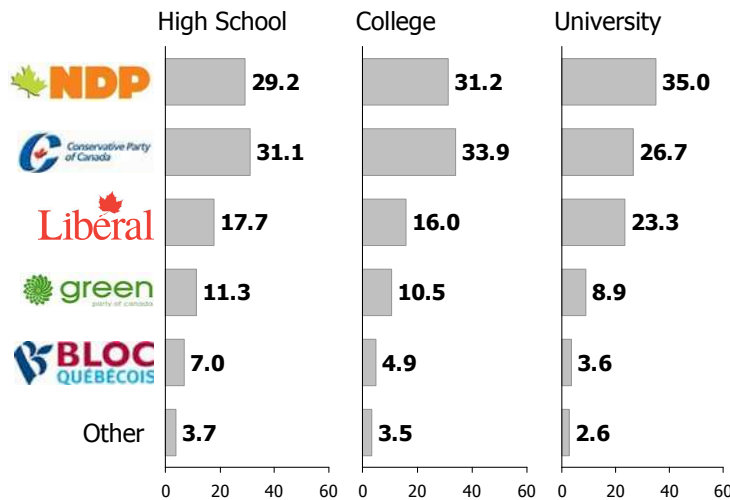
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BASE: Canadians; June 27-July 5, 2012 (n=2,098)

Federal vote intention by education



Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 13.2% of Canadians are undecided/ineligible to vote.

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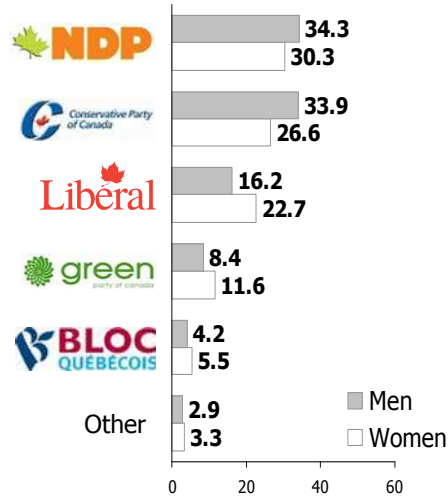
BASE: Canadians; June 27-July 5, 2012 (n=2,098)



Federal vote intention by gender



Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 13.2% of Canadians are undecided/ineligible to vote.






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BASE: Canadians; June 27-July 5, 2012 (n=2,098)



Current federal vote intention by 2011 vote

Q. If a federal election were held tomorrow, which party would you vote for?

VOTE INTENTION	Overall	VOTE IN 2011				
		NDP	CPC	LPC	GP	BQ
 NDP	32.3	70.4	10.7	25.7	17.2	26.5
 Conservative Party of Canada	30.2	4.6	75.3	6.4	8.9	3.5
 Liberal	19.5	11.4	9.0	58.5	9.1	5.2
 green party of Canada	10.0	9.7	1.5	5.1	61.3	3.5
 BLOC QUÉBÉCOIS	4.9	2.8	0.9	2.6	1.0	61.2
Other	3.1	1.2	2.5	1.7	2.5	0.0






Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 13.2% of Canadians are undecided/ineligible to vote.

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BASE: Canadians; June 27-July 5, 2012 (n=2,098)

2011 vote by current vote intention

Q. How did you vote in the last federal election held on May 2, 2011?






VOTE IN 2011	Overall	CURRENT VOTE INTENTION					
		NDP	CPC	LPC	GP	BQ	Other
 NDP	25.1	57.8	3.9	15.1	24.5	14.4	10.2
 Conservative Party of Canada	32.3	11.3	81.8	15.3	5.0	6.1	27.6
 Liberal	18.7	15.3	3.9	56.6	9.3	9.7	10.7
 green party of Canada	6.3	3.4	1.9	2.9	37.5	1.2	5.2
 BLOC QUÉBÉCOIS	5.2	4.4	0.6	1.4	1.8	64.1	0.0
Other	1.6	0.4	0.3	0.2	4.1	0.0	21.3
Did not vote	10.8	7.4	7.6	8.5	17.7	4.5	25.0

Note: The data on 2011 vote are based on eligible voters only. Our survey also finds that 3.7% of respondents are ineligible to vote.

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BASE: Canadians; June 27-July 5, 2012 (n=2,098)


Detailed Tables:

National Federal Vote Intention								
<i>Q. Which party do you intend to vote for on May 2nd?</i>								
						Other	Sample Size	Margin of Error (+/-)
NATIONALLY	30.2%	19.5%	32.3%	10.0%	4.9%	3.1%	1844	2.3
REGION								
British Columbia	26.3%	12.9%	39.4%	19.4%	0.0%	2.0%	156	7.9
Alberta	59.8%	10.0%	19.5%	8.0%	0.0%	2.7%	112	9.3
Saskatchewan/Manitoba	29.8%	24.0%	31.9%	11.0%	0.0%	3.4%	55	13.2
Ontario	35.3%	23.0%	29.6%	8.1%	0.0%	3.9%	833	3.4
Quebec	13.2%	16.4%	39.1%	7.7%	20.8%	2.9%	572	4.1
Atlantic Canada	25.8%	32.5%	28.4%	11.3%	0.0%	2.0%	116	9.1
GENDER								
Male	33.9%	16.2%	34.3%	8.4%	4.2%	2.9%	917	3.2
Female	26.6%	22.7%	30.3%	11.6%	5.5%	3.3%	927	3.2
AGE								
<25	21.6%	13.5%	31.7%	20.8%	8.6%	3.8%	95	10.1
25-44	25.1%	22.0%	30.9%	12.9%	5.3%	3.7%	421	4.8
45-64	31.6%	18.5%	36.7%	6.3%	4.3%	2.6%	775	3.5
65+	42.2%	20.2%	26.5%	5.5%	2.9%	2.6%	553	4.2
EDUCATION								
High school or less	31.1%	17.7%	29.2%	11.3%	7.0%	3.7%	497	4.4
College or CEGEP	33.9%	16.0%	31.2%	10.5%	4.9%	3.5%	584	4.1
University or higher	26.7%	23.3%	35.0%	8.9%	3.6%	2.5%	763	3.6
VOTE IN MAY 2ND ELECTION								
Conservative Party of Canada	75.3%	9.0%	10.7%	1.5%	0.9%	2.5%	594	4.0
Liberal Party of Canada	6.4%	58.5%	25.7%	5.1%	2.6%	1.7%	357	5.2
NDP	4.6%	11.4%	70.4%	9.7%	2.8%	1.2%	453	4.6
Green Party	8.9%	9.1%	17.2%	61.3%	1.0%	2.5%	86	10.6
Bloc Quebecois	3.5%	5.2%	26.5%	3.5%	61.2%	0.0%	118	9.0
Other	8.1%	2.4%	9.3%	31.9%	0.0%	48.2%	23	20.4


Direction of Country

Q. All things considered, would you say the country is moving in the right direction or the wrong direction?

	Right Direction	Wrong Direction	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	44.6%	45.8%	9.6%	1014	3.1
REGION					
British Columbia	38.5%	52.5%	9.0%	87	10.5
Alberta	60.4%	26.2%	13.4%	71	11.6
Saskatchewan/Manitoba	49.1%	42.1%	8.8%	31	17.6
Ontario	46.8%	43.9%	9.3%	428	4.7
Quebec	37.1%	52.5%	10.5%	331	5.4
Atlantic Canada	41.2%	54.1%	4.8%	66	12.1
GENDER					
Male	47.6%	45.8%	6.6%	512	4.3
Female	41.5%	45.8%	12.7%	502	4.4
AGE					
<25	45.3%	39.1%	15.6%	46	14.5
25-44	42.7%	47.6%	9.6%	243	6.3
45-64	42.4%	50.2%	7.4%	461	4.6
65+	53.8%	34.9%	11.3%	264	6.0
EDUCATION					
High school or less	47.3%	36.1%	16.7%	295	5.7
College or CEGEP	43.4%	47.0%	9.6%	316	5.5
University or higher	43.7%	51.1%	5.1%	403	4.9
CURRENT VOTE INTENTION					
Conservative Party of Canada	83.7%	10.3%	6.1%	267	6.0
Liberal Party of Canada	43.5%	49.3%	7.3%	185	7.2
NDP	26.8%	67.1%	6.2%	275	5.9
Green Party	22.2%	64.9%	12.9%	70	11.7
Bloc Quebecois	17.8%	68.6%	13.6%	58	12.9
Other	17.0%	73.0%	10.0%	32	17.3
Undecided	27.2%	49.9%	22.9%	92	10.2



Direction of Government

Q. All things considered, would you say the Government of Canada is moving in the right direction or the wrong direction?

	Right Direction	Wrong Direction	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	35.4%	54.5%	10.2%	1084	3.0
REGION					
British Columbia	39.3%	51.1%	9.6%	82	10.8
Alberta	56.5%	28.6%	14.9%	62	12.5
Saskatchewan/Manitoba	36.6%	52.1%	11.4%	32	17.3
Ontario	36.7%	52.9%	10.4%	505	4.4
Quebec	23.9%	67.7%	8.4%	336	5.4
Atlantic Canada	33.0%	58.1%	9.0%	67	12.0
GENDER					
Male	38.4%	53.2%	8.4%	504	4.4
Female	32.7%	55.5%	11.7%	580	4.1
AGE					
<25	34.6%	50.1%	15.4%	76	11.2
25-44	32.2%	58.9%	8.9%	254	6.2
45-64	34.6%	59.7%	5.7%	413	4.8
65+	43.0%	41.0%	16.0%	341	5.3
EDUCATION					
High school or less	38.5%	47.1%	14.4%	308	5.6
College or CEGEP	37.6%	53.5%	9.0%	353	5.2
University or higher	31.0%	60.9%	8.1%	423	4.8
CURRENT VOTE INTENTION					
Conservative Party of Canada	77.5%	13.6%	8.8%	300	5.7
Liberal Party of Canada	24.4%	65.8%	9.8%	189	7.1
NDP	18.5%	73.4%	8.1%	324	5.4
Green Party	13.4%	80.3%	6.3%	67	12.0
Bloc Quebecois	5.4%	85.4%	9.1%	54	13.3
Other	12.4%	81.6%	6.1%	23	20.4
Undecided	23.0%	52.8%	24.2%	105	9.6

Methodology:

EKOS' weekly tracking polls are conducted using Interactive Voice Response (IVR) technology, which allows respondents to enter their preferences by punching the keypad on their phone, rather than telling them to an operator.

In an effort to reduce the coverage bias of landline only RDD, we created a dual landline/cell phone RDD sampling frame for this research. As a result, we are able to reach those with a landline and cell phone, as well as cell phone only households and landline only households. This dual frame yields a near perfect unweighted distribution on age group and gender, something almost never seen with traditional landline RDD sample or interviewer-administered surveys. This methodology is not to be confused with the increasing proliferation of non-probability opt-in online panels which have recently been incorrectly reported in major national media with inappropriate margin of error estimates.¹

The field dates for this survey are **June 27-July 5, 2012**. In total, a random sample of **2,098 Canadians** aged 18 and over responded to the survey (including a sub-sample of **1,844 decided voters**). The margin of error associated with the total sample is +/- 2.1 percentage points, 19 times out of 20.

Please note that the margin of error increases when the results are sub-divided (i.e., error margins for sub-groups such as region, sex, age, education). All the data have been statistically weighted to ensure the samples composition reflects that of the actual population of Canada according to Census data.

¹ For further reading, please see "AAPOR Report on Online Panels" by the American Association for Public Opinion Research, accessible online at:
http://www.aapor.org/AM/Template.cfm?Section=AAPOR_Committee_and_Task_Force_Reports&Template=/CM/ContentDisplay.cfm&ContentID=2223