

A close-up photograph of a person's hand holding a pen over a laptop keyboard. The background is a blurred wooden wall. The lighting is warm and soft.

KANTAR PUBLIC

Kantar Public Inspiration

Conference Elections 2021

Block 3

1 June 2022

Kantar Public Election Team



Kantar Public Election Team is a global, international expert team able to offer **independent, robust, tried and tested electoral research** solutions for upcoming elections across the world.

We have developed unique international expertise in analysing voting intentions and predicting the results of elections. We offer experience and a successful track record spanning electoral campaigns across Europe, Asia and the Americas.

We offer expertise at each stage of the electoral cycle, including

- pre-election research and advisory
- voting intentions
- election night and exit polling
- projections (vote shares and seats)
- post-election research and analysis



KANTAR

Le Centre Kantar Public sur l'Europe

Kantar Public's pan-European think tank

CENTRE
KANTAR PUBLIC
SUR **L'EUROPE**

**Migration:
A key challenge
for the EU**

How to reconcile citizens' concerns,
duty of solidarity and the needs of
migrants?

November 7th, Brussels



The *Centre Kantar Public sur L'Europe* brings together a pan-European team of researchers with expertise in political and opinion polling, social and economic trends and migration.

With a team of researchers drawn from Kantar Public teams in Germany, France, UK, Poland, the Netherlands, Belgium and Sweden, the Centre will offer insight into and analysis of public opinion and political change across Europe and its member countries. It provides resources for journalists and researchers worldwide, through its programme of publications.

The Centre aims to contribute to the quality of public debate through Kantar's analysis and knowledge of public opinion and political change in Europe and its member countries.

Find more information and our latest thought leadership on [our website](#).

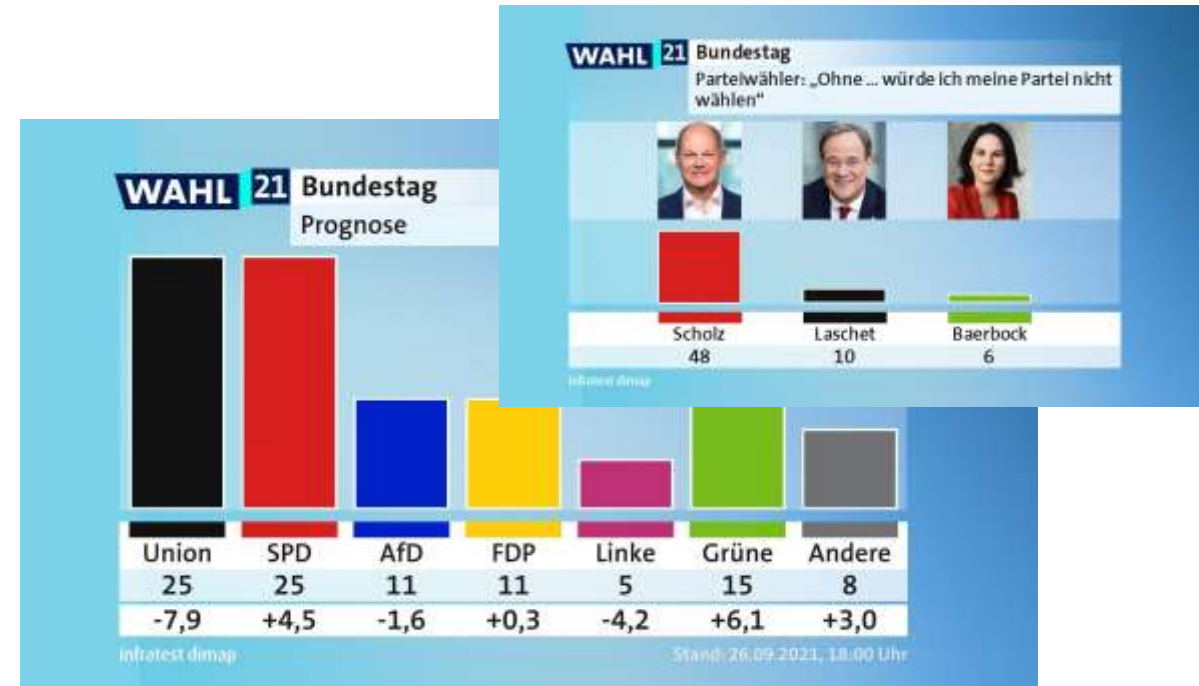


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Projections of the results
at the closure of polling
stations

Exit polls in Germany

Infratest dimap has been conducting exit polls for the ARD on federal and regional elections for decades

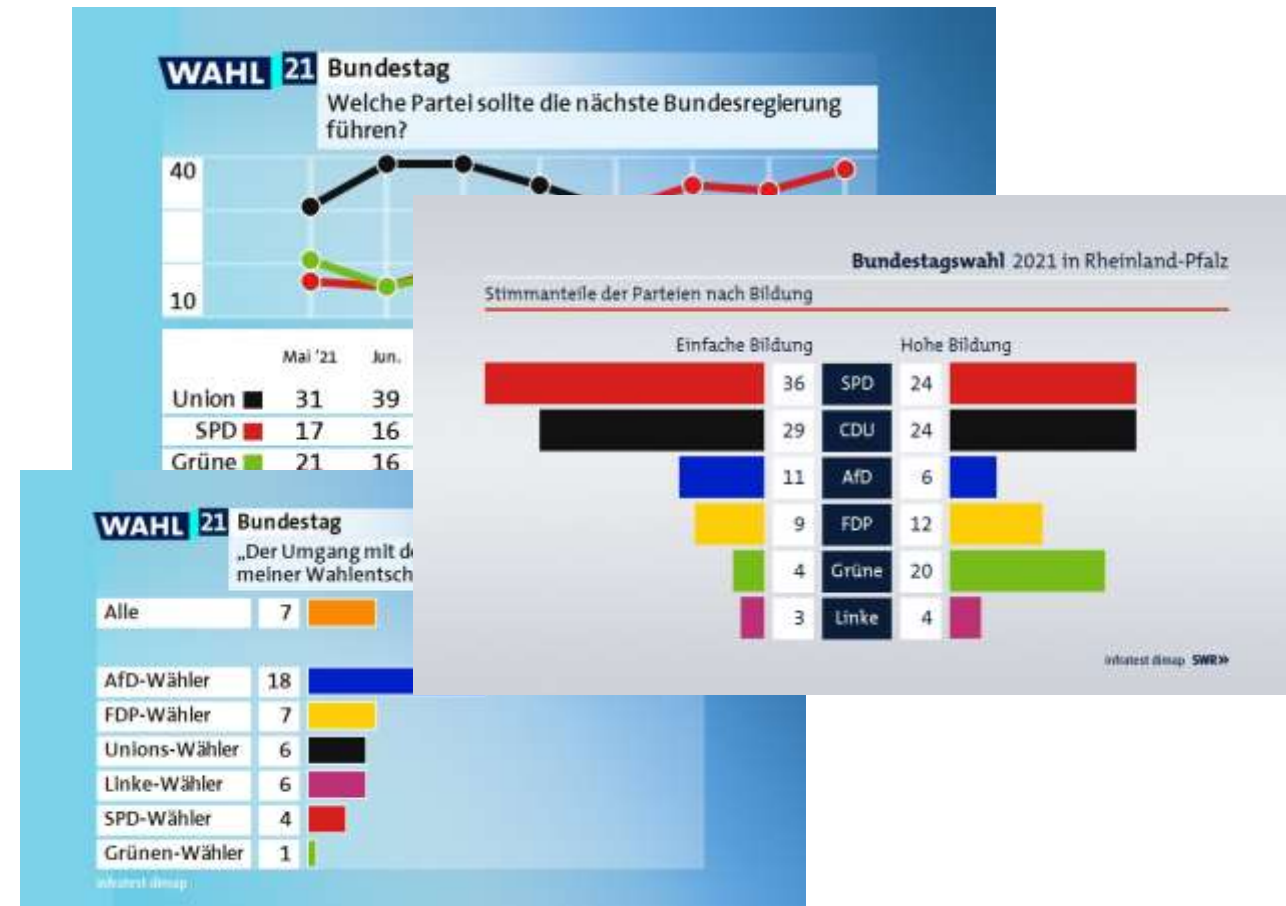
- Exit polls are conducted during the day of the elections to provide a first estimate of the results at the closure of the polling stations
- This is a widespread methodology to provide an accurate estimate before official results but it is a rather expensive exercise and therefore is not used in every country in the world for elections
- Exit polls are different from polls conducted during the day. The sample interviewed is much bigger and is based on actual voters as people are interviewed at the exit of polling stations
- The sampling design ensures that precincts selected for the exit poll are representative of the overall results based on past elections
- Our team based in Berlin has been conducting exit polls for the one of the main TV channels in Germany – the ARD



Exit polls in Germany

More than 70,000 people who voted took part in 2021 Exit polls conducted by Infratest Dimap

- Last exit polls for federal elections were conducted on 26 September 2021
- 560 Sampling points = 560 polling stations (selected based on past vote)
- Self-administered Questionnaire (Paper & Pencil) = still the most reliable way of collecting data for exit polls
- 72,250 Interviews, including 11,000 with additional questions about Preference of Coalitions ect.
- Around 70% of the voters fill out the questionnaire
- These information are then modelled and provide the basis of the 8PM projection published with a huge set of charts and visuals



Exit polls in Germany

The COVID-19 crisis boosted postal voting

- Postal voting went from 28.6% in 2017 to 47.3% in 2021 as a direct effect of the COVID-19 crisis.
- It is a real challenge for exit poll and our researchers in Germany had to increase the second sample of postal precincts to collect the results from these during the evening. The number of these sample points was risen from 60 to 140
- There are regional differences in postal voting

WK=Electoral District	Name	Proportion of postal votes
	156 Bautzen I in Saxony	26%
	227 Deggendorf in Bayern	70%

- But also on political party vote

	Voting on	
	Postal voting	election day
CDU	18,8%	19,0%
CSU	7,0%	3,5%
SPD	25,9%	25,6%
AfD	6,7%	13,6%
FDP	11,5%	11,4%
LINKE	4,5%	5,3%
GRÜNE	16,7%	13,0%
Others	8,9%	8,6%

German postal vote 1957 to 2017

Share of absentee ballots in general elections

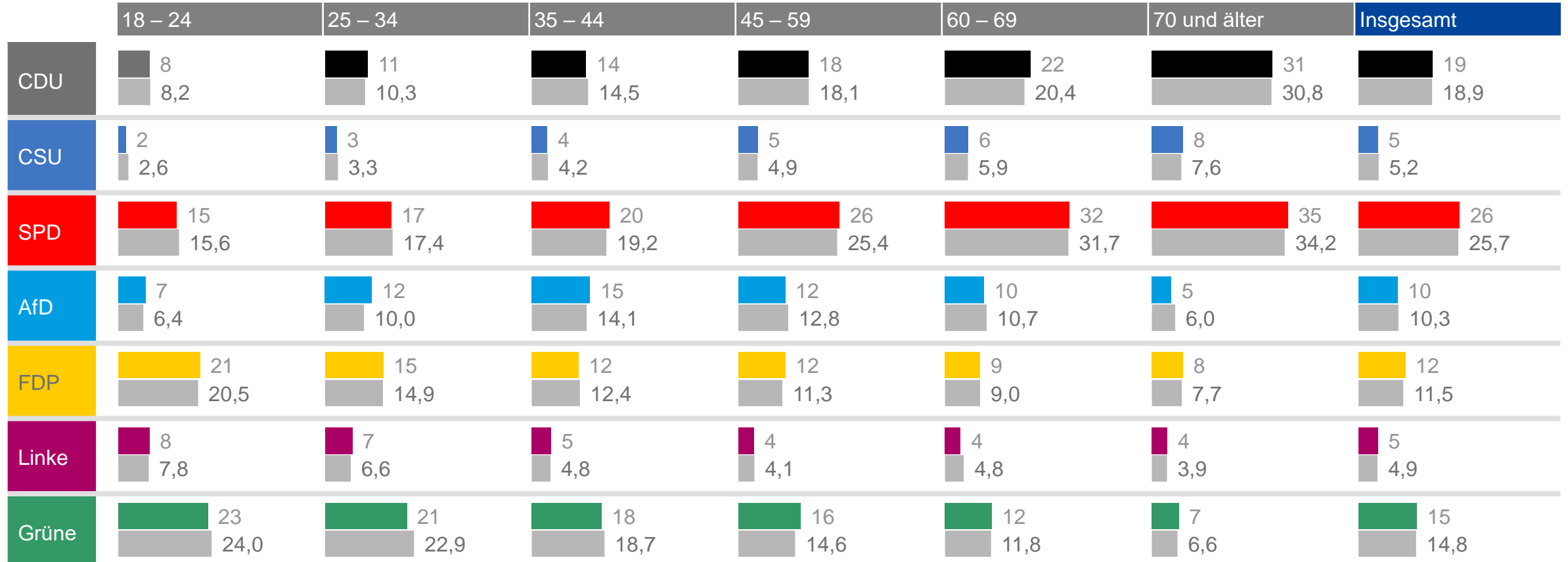


Source: Der Bundeswahlleiter

General elections
2021
47.3%

Exit polls in Germany

Comparison infratest dimap with the Representative Electoral Statistics of the Federal Statistical Office



Legend:

Colours = exit polls results Infratest Dimap

Grey = official results (four months after the elections)

Estimations in France

An alternative to exit polls used mostly in France

- Estimations are based on “real votes” and therefore they are only possible when there are different times for the closure of polling stations in a country
- It is used in France as a very accurate methodology (as based on real ballots and not dependent on declarative vote) and a less expensive methodology to provide a reliable estimate of the results at the closure of the last polling stations (8PM)
- It is possible in France as polling stations close earlier in rural/town (6PM-7PM). Only big cities close their polling stations at 8PM
- One of the challenge is to take into account the difference of votes in big cities compared to other parts of the country (see what happened with Melenchon who came third at the Presidential election 2022)
- As for exit polls, the sampling is done based on a representative sample of the polling stations in the country based on past vote



Estimations in France

A methodology based on counting of actual votes

- The polling stations are selected based on past vote. The combinations of the votes in these polling stations
- An interviewer is working at each polling stations selected
- At 5:30 PM, the interviewers send turnout figures of the polling stations to the central team = used for a first official turnout estimate published at 6:15 PM
- At 6:15 PM, the interviewers send the results of the first 200 ballot counted = 6.45 PM first national projections of the results is done. This will be refined during the night
- At 7PM, the interview provide the final counts at their polling stations
- At 8PM, the first estimate of the results is published
- The estimation is refined until 10-11PM



Estimations in France

A reliable methodology which provide estimates that are close to the actual results

Candidates	Estimation at 8PM	Results
E. Macron	28.6%	27.85%
M. Le Pen	23.9%	23.15%
J-L. Melenchon	20.1%	21.95%
E. Zemmour	7.0%	7.07%
V. Pécresse	4.7%	4.78%
Y. Jadot	4.8%	4.63%
J. Lassale	3.3%	3.13%

Only the top 7 candidates are listed here

There were several estimations published on that night. Here we used the one produced by Ifop-Fiducial for TF1 and LCI at 8 PM

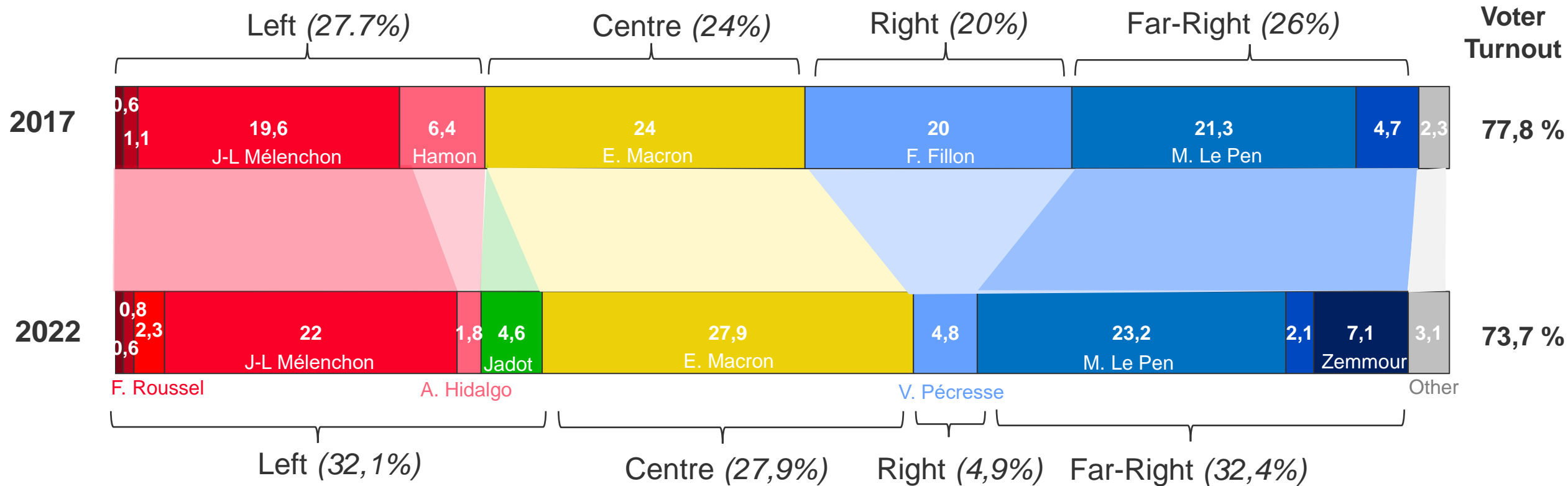
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Innovative methods for pre-election surveys



The 2022 1st round election results compared to 2017

First Round Results – Presidential Election 2017 and 2022

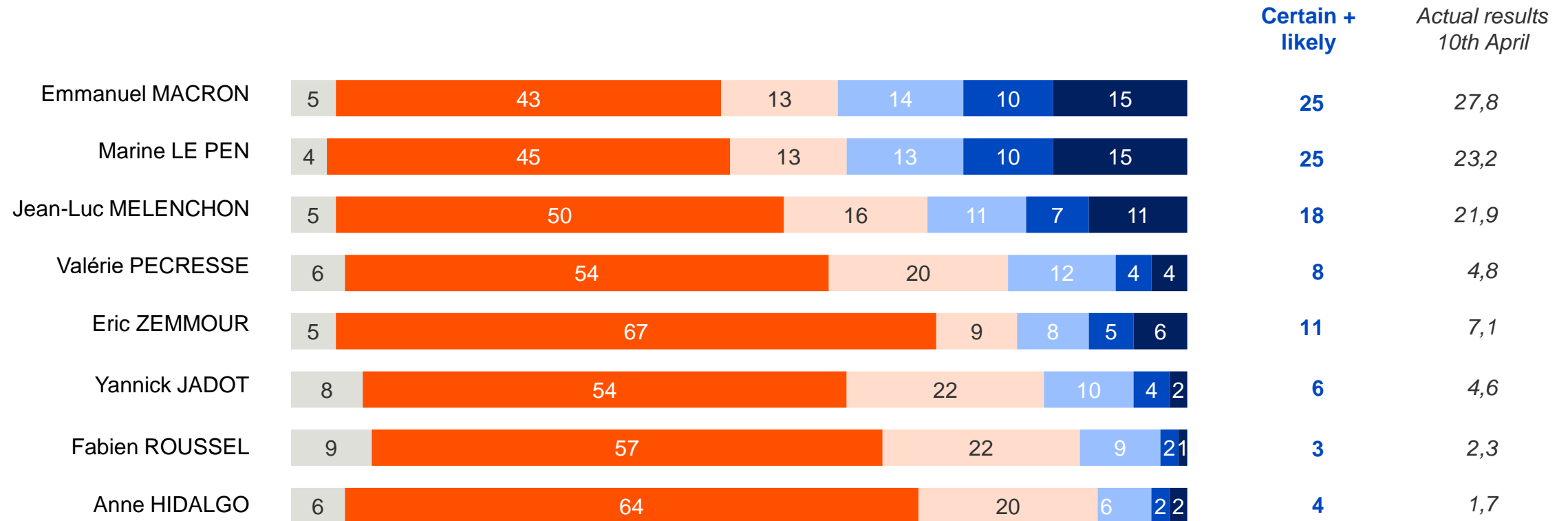


The potential electorate of the main candidates



For each of the following candidates, with the first round of the presidential election in mind, would you say that you are:
In %

- No opinion
- Certain to never vote for her/him
- Unlikely to vote for her/him
- Open to vote for her/him
- Likely to vote for her/him
- Certain to vote for her/him



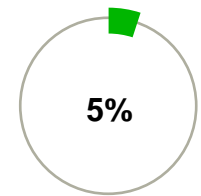
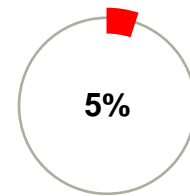
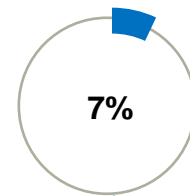
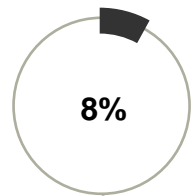
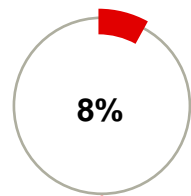
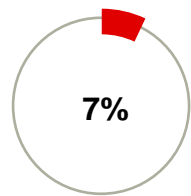
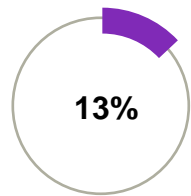
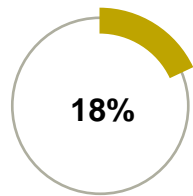
Base : Ensemble

Analysing the core electorates

Based upon the results of the question of potential electorates, a statistical analysis has made it possible to group together respondents who gave similar answers. This allows us to **identify several electoral groups with similar traits.**



The 8 groups of voters who have a strong preference for a candidate



(This indicates a high probability of voting for one candidate and a low probability of voting for the others.)

Voters who have a high probability of voting for J-L. Mélenchon but don't seem yet to have given up the possibility of voting for other left-wing candidates: specifically Fabien Roussel and Yannick Jadot.

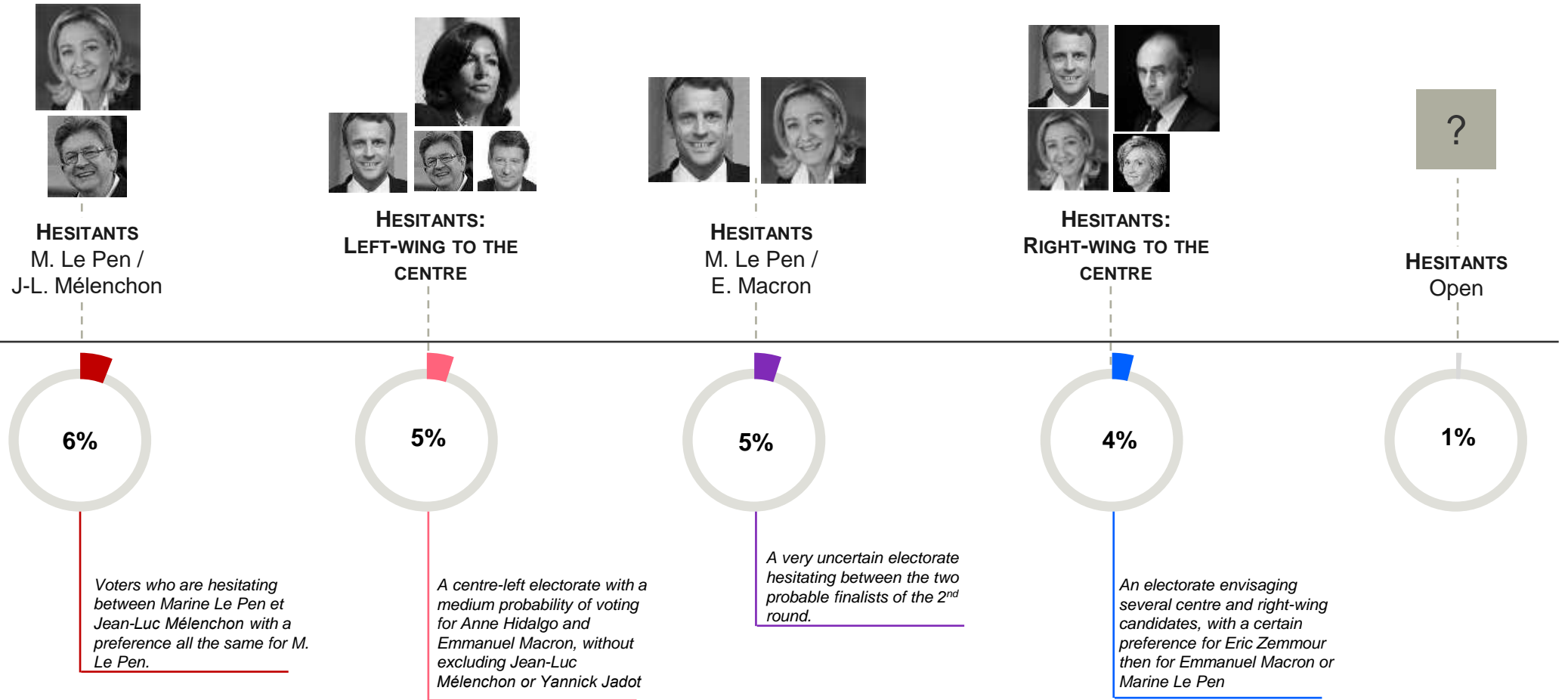
Voters who have a high probability of voting for E. Zemmour but also for M. Le Pen : A tactical voting reflex in favour of Le Pen that could cost E. Zemmour votes.

The core electorate of Valérie Péresse, even if some of these voters do not exclude the possibility of voting for Macron or Le Pen

Two left-wing electorates that indicate a clear preference for their candidate without completely excluding other similar candidates.

Reading key: 18% of respondents, all on the electoral register, currently indicate that they are highly likely to vote for Emmanuel Macron and very unlikely to vote for the other candidates

Analysing the electoral base



The hesitant electorates
(This indicates a medium or high probability of voting for several candidates)

+ non-voters or other candidates (8% indicate a weak or zero probability of voting for any of the tested candidates)

Reading key: 5% of respondents, all on the electoral register, currently indicate that they are highly or quite likely to vote for Le Pen and Emmanuel Macron

Intuitive Associations: Used to measure the perceptions of the candidates

A reaction time technique – it isolates one's instant impression of a candidate

“Is this a term you associate with the candidate?”

Intuition



Quick, easy decisions



Reflection



Slower, more considered decisions



TIME

Reaction time techniques are better suited for measuring emotions

The speed of processing emotions is faster than rational processing

Strength of Intuitive Associations & Emotional Connection

Question administered

We ask:
Is this a term you
associate with Macron?

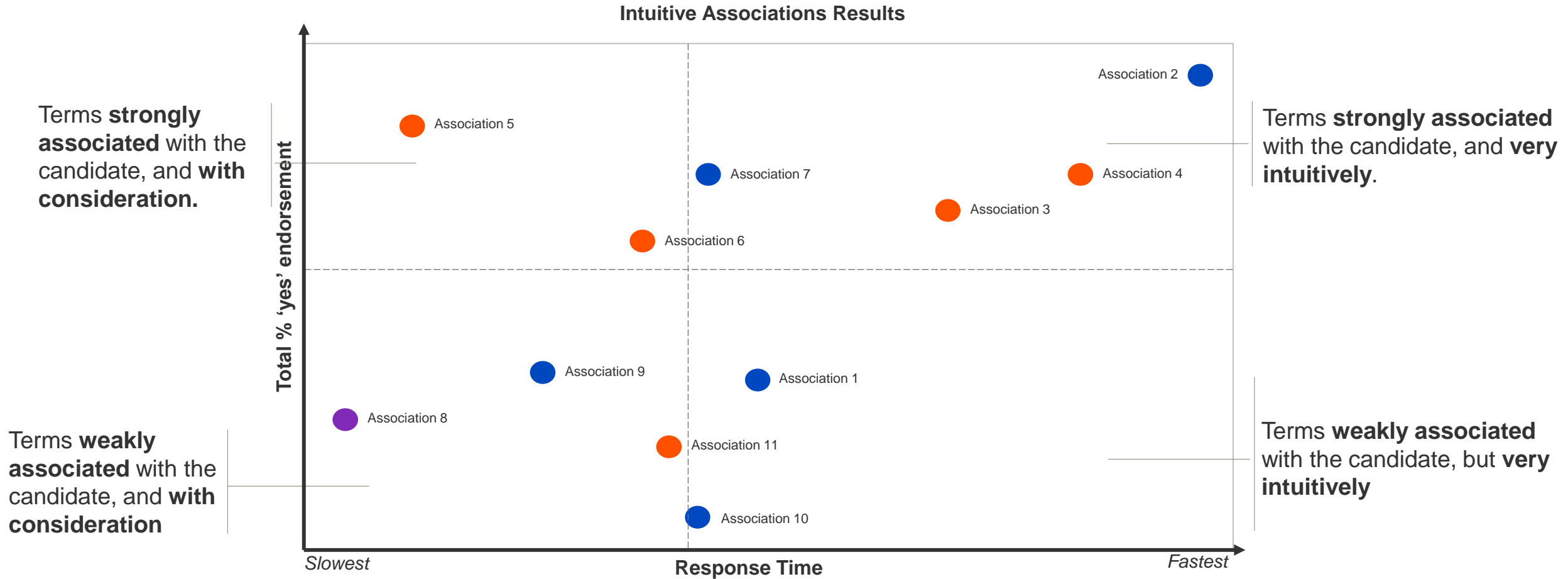


COMPETENT

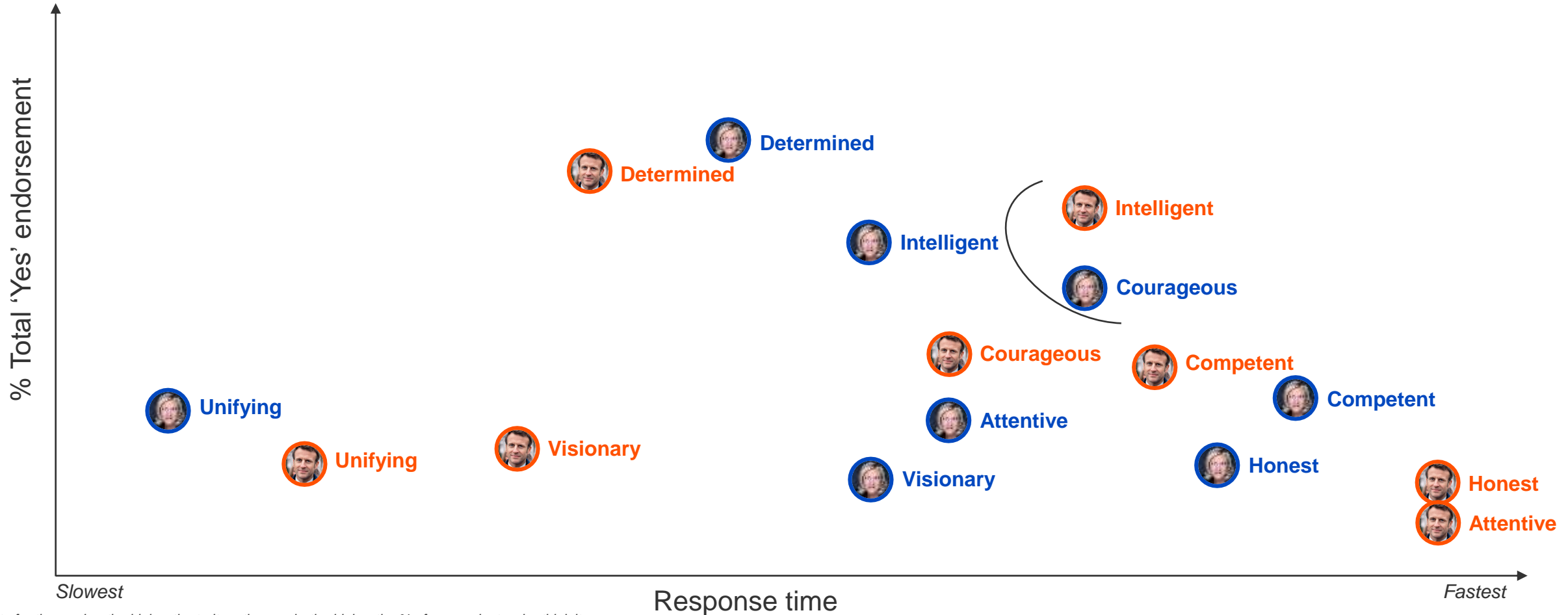
Press A for Yes

Press L for No

Quadrants allow us to compare Intuitive vs. Considered Associations

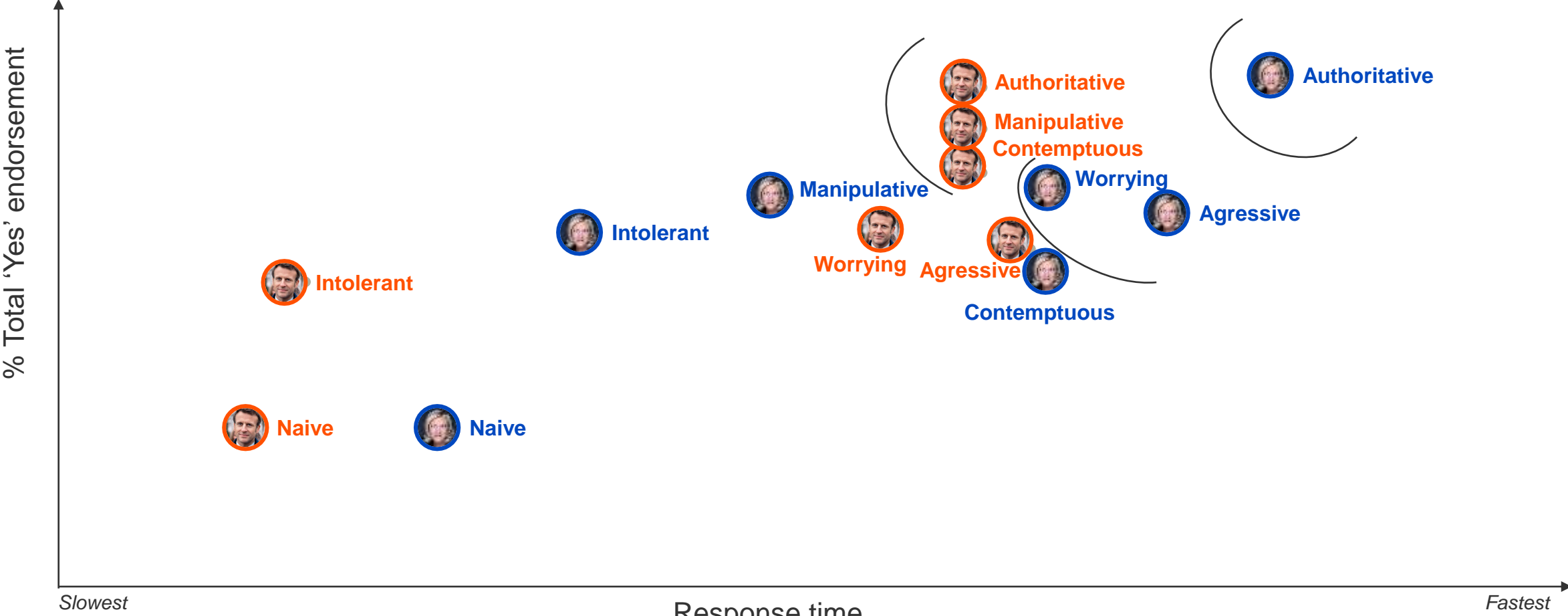


Positive intuitive associations : intelligent for Macron, courageous for Le Pen



Note for the reader: the higher the trait on the graph, the higher the % of respondents who think it applies to the candidate. The further to the the right the trait is on the graph, the quicker the respondents attributed it to the candidate.

Negative intuitive associations : A little humility wouldn't go amiss...



Note for the reader: the higher the trait on the graph, the higher the % of respondents who think it applies to the candidate. The further to the the right the trait is on the graph, the quicker the respondents attributed it to the candidate.

Thanks !

We will be very happy to connect with you for further discussions



Emmanuel Rivière
Director of International Polling, Kantar Public,
Chair, Centre Kantar sur l'Europe

emmanuel.riviere@kantar.com

An expert in polling, political consultancy and communication, Emmanuel is a guest lecturer at the prestigious Sorbonne and Sciences Po universities and is a well-known and frequent commentator in the French media.



Nicolas Becuwe
Senior Director, Head of the International Election team,
Kantar Public Brussels

nicolas.becuwe@kantar.com

An expert in polling and research working with European institutions on policy, communication and election research. Passionate about European politics, he has specialised in multi-country research studies that focus on European social and political issues.