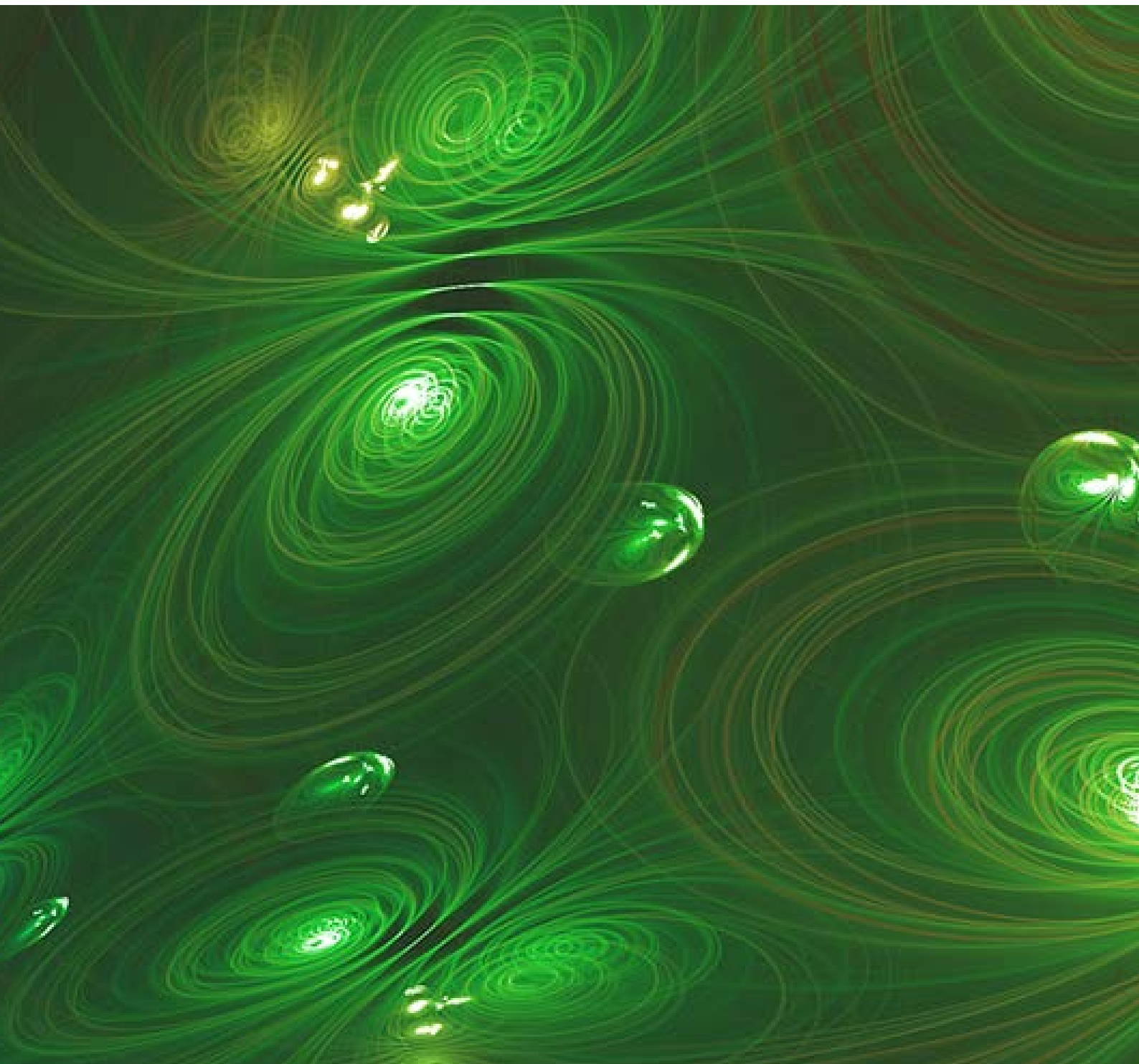


Freedom to Conduct Opinion Polls

A 2017 Worldwide Update



ESOMAR

WAPOR
WORLD ASSOCIATION FOR PUBLIC OPINION RESEARCH

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A 2017 Worldwide Update

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ESOMAR

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Foreword

by ESOMAR Director-General, Finn Raben

Opinion polling has become an exponentially more challenging form of research in the past few years....questions about reliability, validity and authenticity have become legion – and yet, on review, many of these criticisms can be attributed to the interpretation of the poll findings, rather than the methodology itself.

Despite the informational value polls bring, restrictions on the publication of opinion polls - particularly in the run-up to major political elections – is a popular tactic in many jurisdictions. ESOMAR and WAPOR have cooperated since 1984 in documenting those restrictions. This report marks the sixth in the Freedom to Publish Election Polls series.

Restricting the publication of election polls runs counter not only to the right to conduct and publish polls freely as upheld by Article 10 of the European Convention for the Protection of Human Rights and Fundamental Freedoms, but also to the proven finding that election polls are a relatively neutral interpretative aid.

Last year, on the occasion of ESOMAR's 70th Anniversary Congress, a unique reference database was launched.

The database – compiled by Kantar Lightspeed and made available through ESOMAR – collated more than 35,000 published polls, and not surprisingly, the margin of error (i.e. the number of polls that got it “wrong”), was less than 3%.

ESOMAR, the global voice of the Research, Data and Insights Community, has always actively fostered the professional ethical standards of the industry. All ESOMAR members are asked to undersign that they will apply the ICC/ESOMAR Code of Conduct and the ESOMAR/WAPOR Code on Conducting Public Opinion Polls as a prerequisite for being accepted as members. Furthermore, the online guidance course for journalists in how to interpret and publish poll findings – originally designed by AAPOR, and adapted for the global market by ESOMAR and WAPOR – is an additional resource (and check measure), which we sincerely hope will actively promote a reduction in polling restrictions.

ESOMAR will continue to support and promote this initiative, in the hope that the regular publication of this report will help to alert and inform political leadership, the media and the general public about the need to safeguard and further strengthen the right to free information.



Foreword

by WAPOR President, Claire Durand

As current president of WAPOR, I am honoured to introduce this new report on the right to publish opinion polls. This joint WAPOR ESOMAR initiative started a long time ago, in 1984, in a period where polls were becoming ubiquitous in the electoral campaigns in established democracies. A number of politicians, in particular, were preoccupied that polls might play a role in influencing uninformed citizens to vote for the leading party or candidate, the so-called “bandwagon effect.”

There were also preoccupations about the possibility that “fake polls” be published with the aim of influencing voters. In reaction, many countries promulgated laws aimed at controlling the electoral polls by defining the methodological information that had to be published together with the polls and, in some cases, restricting the publication of polls for some period before the election. Close to 35 years later, many authoritarian regimes have become democracies and electoral polls are conducted in almost all the countries in the world. However, while some countries have reduced their ban on polls, other countries have introduced such a ban or even increased polling restrictions.

Why is it so important to fight against limits to the publication of opinion polls? First, because democracy means that all citizens are entitled to the same information when they vote. Bans on polls restrict access to information to the majority of the population while leaving a privileged minority who have access to it. In addition, in such environments, rumours – including about poll results – tend to replace scientific information. Second, because when polls are published until the very end of electoral campaigns, it is possible to assess the quality of the polls and eventually improve that quality through research. When polls are banned over a long period, it is not possible to know whether discrepancies between polls and the actual vote are due to change in support for the different parties or to methodological problems. WAPOR remains preoccupied with these problems and will continue to monitor the worldwide situation. We hope that this report will contribute to this endeavor.



Introduction: The Importance of the Freedom to Publish Opinion Polls

Public opinion polls and surveys can examine issues which arouse great public interest. They are often widely published and debated, but may sometimes be subjected to governmental restrictions - especially when it comes to the publication of poll results before elections.

WAPOR (the World Association for Public Opinion Research) and ESOMAR (the Global Voice of the Data, Research and Insights Community) have collaborated since 1984 in a series of studies assessing governmental restrictions on pre-election poll reporting throughout the world.

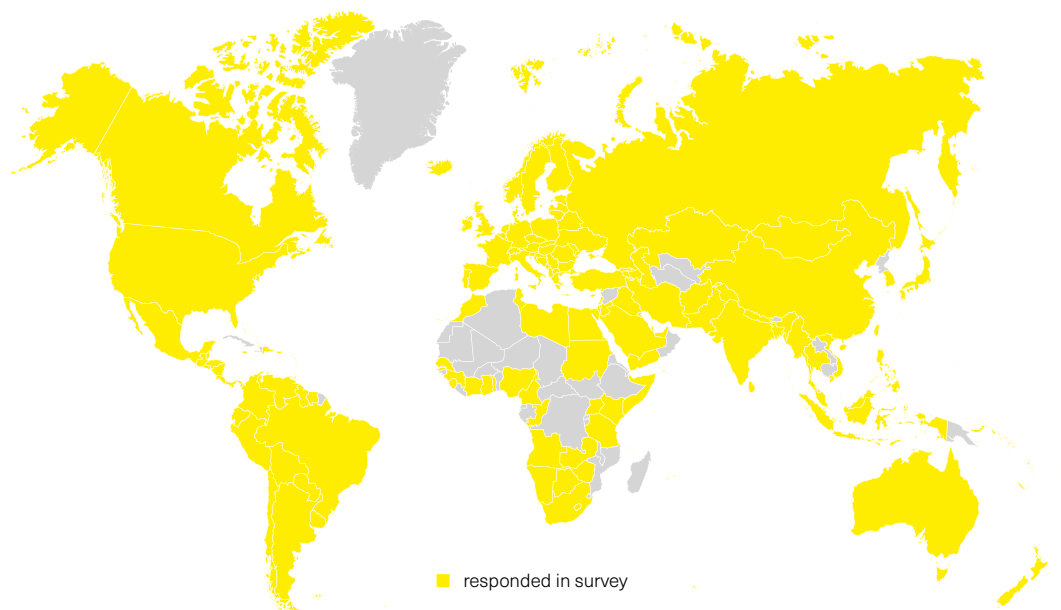
We hope that this most recent report will be read by government decision makers and journalists as well as researchers. WAPOR and ESOMAR promote high quality research and the importance of the free publication of results. We believe that properly conducted public opinion polls remain the best way of providing the public with a voice in decision-making. Limiting the publication of opinion polls hurts everyone - the

public, the government, and even decision-makers - because amongst other things, polls transmit citizens' goals, attitudes and desires to governments and political parties. Polls give governments and parties better ability to represent and serve voters.

This report is the sixth and by far the most extensive in the series of studies. It features current reports from 133 countries (see Figure 1), 50% more than the last report, and nearly three times as many as the 45 in the first study. The study is truly global, with significant coverage in Africa, Asia and South and Central America, as well as Europe, the Middle East, and North America.

However, the global reach of this study finds even more restrictions on poll publication than the earlier studies. 79 countries (60%) report some sort of an embargo, a larger percentage than ever before.

Figure 1
Countries covered in the 2017 Freedom to Publish survey



Polls are definitely part of the social and political landscape in most of the world. In more than 90% of all countries, polls are used in evaluating public opinion about social issues, about government, and economic and educational issues. However, in many places there are severe restrictions on reporting information from polls.

This study finds embargoes on the publication of pre-election poll results lasting 30 days or more before an election in four countries – Bolivia, Cameroon, Honduras and Tunisia. In another ten (Chile, El Salvador, Guatemala, Italy, Montenegro, Panama, Paraguay, Singapore, Slovakia, and Zambia), blackouts last at least two weeks. Blackout periods of such length are more than restrictions on reporting. They outlaw reliable poll information during critical periods of election campaigns and thus expose voters to misinformation from other sources – information that cannot be verified. In addition, there are seven countries where polls are not used at all in pre-election periods, another example of limits on public expression.

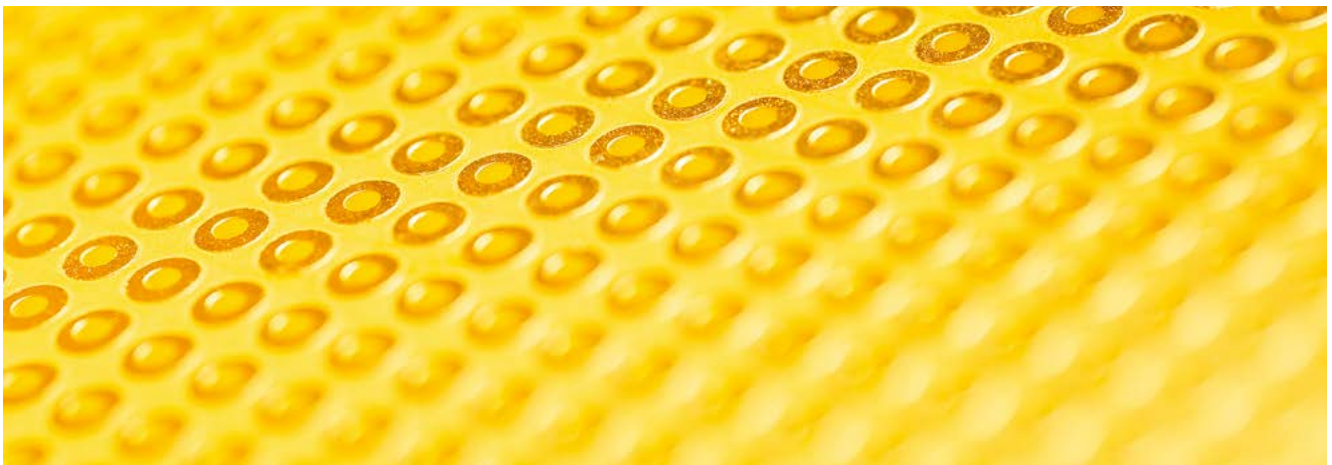
In most countries there are restrictions on the freedom to publish election polls. Poll information is known to be available immediately before an election in just 33% of the countries for which we have data.

Where pollsters can conduct polls in the days before elections but cannot publish them beforehand, inequality in access to critical information is created. Pollsters can only share results with their clients, with only those who can pay having access.

The public - without pre-election poll information - has little preparation for what happens when the votes are counted. The struggles after the 2017 election in Honduras, which has a 30-day poll embargo, is a good example of this. There were claims of fraud on both sides, with protests that turned violent. There were no pre-election polls that could have given the public advance notice of the closeness of the result.

In the 2017 Chilean presidential election, polls showed the third candidate far behind, and there were accusations of political influence on the polls. But the country's 15-day pre-election embargo made it impossible for the general public to track changes in public opinion during the final weeks of the campaign.

When pre-election polls diverge from the results, even very slightly, the result is a chorus of demands to limit polling before elections. While some may want to criticise polling and assume that government regulation is the solution, research tends to show that this is not the best approach (see: <https://wapor.org/house-lords-statement/>) since some government regulations are rarely enforced due to lack of resources and will. It should also be noted that recent research suggests that the quality of pre-election polls has changed little in recent years (Jennings and Wlezien, 2018). Over the long-term, polling in the last week of election campaigns has even become more accurate (Puleston, 2017).



Methods Note

The study was conducted from the University of Illinois at Chicago by Professor Timothy Johnson, WAPOR's Standards Chair, and Marina Stavrakantonaki. Information came primarily from questionnaires answered by expert country respondents, including WAPOR and ESOMAR national representatives and other members, and national representatives of international survey collaborations and public opinion research experts, including Afro Barometer, Arab Barometer, Asian Barometer, Eurobarometer, European Social Survey, European Values Survey, ISSP, Latin American Barometer, and the World Values Survey. WIN and GIA country representatives, coordinated by Chiara Monetti, contributed in detail on government regulation.

Additional country respondents were identified by Mari Harris of South Africa, who kindly shared the questionnaire with colleagues in other African nations, and Timothy Johnson through personal contacts with survey experts in nations for which country representatives could not otherwise be identified. Country respondents were asked to complete an online questionnaire, which is included in the Appendix along with the more detailed methodology (see Appendices 1 and 2). Embargo information was supplemented by research using the ACE Project (The Electoral Knowledge Network).



Executive Summary: Climate and trends for conducting and reporting poll results

It would be wonderful to be able to say there has been a relaxation of restrictions on the freedom to conduct opinion polls and to publish polling results, but this is not the case. In all of our WAPOR/ESOMAR studies (except for 1996), about half the countries studied reported some form of embargo on the publication of pre-election polls. While there has been movement in some countries to ease regulations since earlier studies, including in Argentina, Greece, Portugal, Romania and South Korea, even more countries, including Brazil, Chile, El Salvador, Egypt and Singapore, have tightened restrictions and extended embargoes.

In this truly global study, we report more restrictions and highlight trouble spots throughout the world. Embargoes and restrictions seem particularly problematic in Latin America where polling is heavily regulated, limiting the publication of pre-election polls in every country for which we have information. This is not a new phenomenon. In 2002, far fewer Latin American countries were part of the study, but even then, eight of the ten countries had embargoes (Spangenberg, 2003). But there have also been

increases in regulation. Honduras reported no embargo on polling in 2002; it now has a 30-day blackout period before elections.

Polling as a tool extends beyond the pre-election period. Between elections, there are questions about policies, leaders, and the social landscape. The national government, the media, businesses, political parties and special interest groups all conduct polls. However, it is not getting easier to conduct polls. In nearly 40% of countries, our respondents say polling is becoming more difficult. Just half that number say it is becoming easier.

Threats to good polling include government regulations, but regulation is not the only worry for researchers. For example increased costs for quality polling are also a factor in Africa and Europe, as are declining response rates in Europe and North America. In Latin America, there are worries about the ability to reach respondents, because of crime and security concerns.



Exit polls have been conducted freely in about one in three countries but are not permitted in one in ten countries. In most countries where exit polling has occurred it has taken place with limitations on where interviewers can stand, and when exit poll results can be reported. There are ten countries where exit polls cannot be reported by the news media at all.

One positive finding is that respondents in our study view the quality of polls in their country as generally good, saying that pollsters in many countries mostly conform to rules of transparency in providing information that help readers to evaluate a poll.

However, this information is not always easy to find and polls are rarely available in public archives for peer review. Most critically for the public's perception of polling, the study's respondents have little confidence in the ability of journalists to understand and properly report poll findings.

There needs to be continued outreach to and education of journalists. ESOMAR and WAPOR have taken steps in this direction, with the creation of a free online short course for journalists, written in cooperation with the American Association for Public Opinion Research (AAPOR) and hosted by the Poynter Institute <http://www.newsu.org/courses/understanding-and-interpreting-polls-international>.

In short, many respondents to the study see limits on their ability to produce good results, and to have them reported correctly. However, they remain convinced that they can produce high quality opinion and election polls.

This study shows one thing remains unchanged: governments in more than half the countries in our study restrict the publication of poll results before elections, with the strongest limits in Latin America.



Chapter 1: Who commissions polls and are they just for pre-elections?

In nearly every country in our survey, public opinion polls are used for far more than elections. Figure 2 underscores their importance in helping decision-makers take into account the public's needs and desires.

In a slightly smaller subset of countries, respondents reported on which topics are covered by polls. Only seven countries indicated that polls are not used for elections (the PRC or People's Republic of China, Morocco, Qatar, Saudi Arabia, Sudan, Tajikistan and Vietnam), although some of those countries poll on social issues. Nearly nine in ten countries (88%) use polls to evaluate political parties and leaders. In over 90% of all countries, polls are used to evaluate public opinion about social issues, government, economic and educational issues. Overall coverage of crime and the environment in polls is only slightly lower.

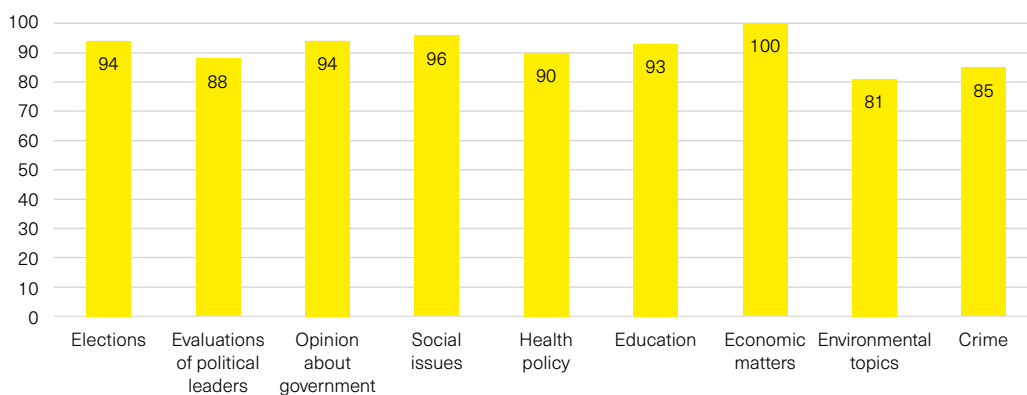
Polls are more likely to be conducted by national rather than local governments (see Figure 3). Respondents in 80%

of countries report that the national government conducts polls, but only 60% say local governments do. Polling is conducted by non-profit organisations and special interest groups in more countries (90%). In addition, more than three-quarters of countries report that print and television news media conduct polls, as do private businesses in more than 80% of countries.

Political parties also conduct polls. Those polls are omnipresent in the Western Hemisphere and in nearly every country in Europe (90%) included in this study. Much smaller majorities in Africa and Asia (where often polling has a shorter history) report they know that political parties conduct polls, reflecting the fact that survey research in general and opinion polls in particular are more established in the USA and Europe, and more recent in emerging democracies of Africa, Asia (in which we include the Middle East and Eurasia) and Latin America.

Figure 2

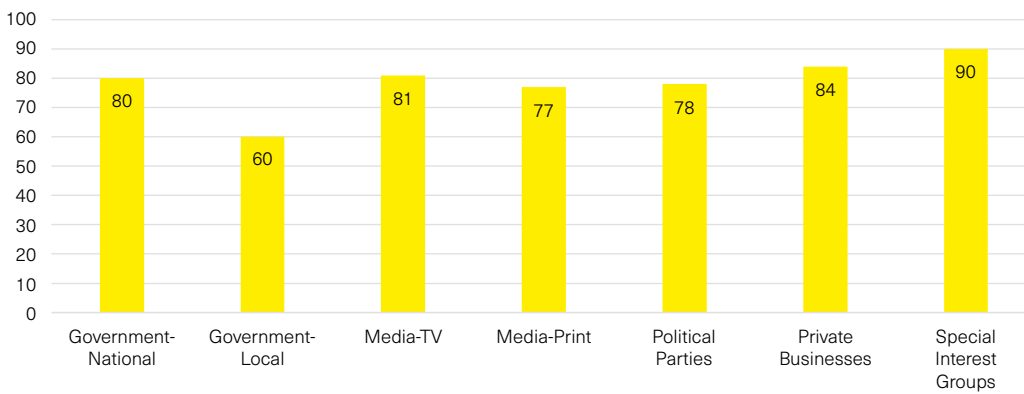
Percentages of countries reporting conducting polls on various topics (Q3)



There is less polling by the media in Africa and Asia than the rest of the world but even about two-thirds of countries there have media polls, both on television and in print. Countries in our survey where representatives reported no print or

electronic media polling include Andorra, Azerbaijan, the PR of China, Congo, Jamaica, Lebanon, Namibia, Qatar, Sudan, Tajikistan, Togo, Vietnam, Zambia and Zimbabwe.

Figure 3
Percentage of countries reporting types of institutions commissioning public opinion polls (Q2)



Chapter 2: Where can poll results be freely conducted and reported?

In the 2002 study, just under half the countries reported some type of poll embargo prior to elections (Spangenberg, 2003). The same was true in 2012, when nearly half the 85 countries studied imposed some sort of blackout period (Chung, 2012). In this study, which expands the coverage to 133 countries, and shows a larger share of countries with government control: 60% report an embargo on poll publication before elections; an additional 5% conduct no pre-election polls, leaving pre-election poll information unrestricted in just a third of countries.

Countries in the smaller 2002 study were somewhat less likely to report blackouts than in any other study but the reporting countries differ in each study, limiting direct comparison. In 2002, 15 of the countries that had also reported in 1996 said restrictions were eased but respondents in nine countries said there were more restrictions than before. Using the same

analysis for 2012 and 2017, 14 countries report shorter embargoes, while 23 report longer blackouts. In more than half of those countries, the embargo was increased by only one or two days.

In many of those countries with pre-election poll blackouts, the blackout period is relatively short: the median being just five days (Table 1). That masks large differences by region, however.

Two in three European countries report a blackout period that typically lasts just a few days. A handful however, including Italy, Luxembourg, Montenegro and Slovakia, report blackouts of at least one week or even two.

Embargoes are especially severe in Latin America. Every country in Latin America for which there is data has a

Table 1

Blackout periods (Q20) and their length, by region 2017 (Q21)

	No blackout %	Blackout 1-6 days %	Blackout 7+ days %	Blackout length unknown %	Unknown if have blackout %	No election polls %	Median blackout days (range)*
Africa (n=26)	54	15	12	12	0	8	5 (2-150)
Asia, Middle East & Eurasia (n=37)	32	30	16	8	0	14	5 (1-14)
Europe (n=41)	27	51	17	0	5	0	2 (1-15)
Latin America (n=19)	0	26	68	0	5	0	7 (2-30)
North America & Caribbean (n=7)	71	29	0	0	0	0	1
Oceania (n=3)	67	0	33	0	0	0	7
Total (n=133)	33	32	23	5	2	5	5 (1-150)

* Median is the value in the middle of a range

Note: question wordings are: In your country, is there a blackout period for pre-election opinion polls, during which polling results may not be released to the public? (Q20) and [if Yes to Q20] How many days, prior to an election, is the publication of polls not permitted? (if there are different blackout periods for different elections, please refer to the election with the longest blackout period and specify the type of election). (Q21)

pre-election blackout period, many of them lasting a week. The median duration in all of Latin America is seven days (with a range of two to 30 days); but the median in Central American countries is over two weeks, with a range of three to 30 days. The median in Africa is lower, but whilst most countries in Africa do not have embargoes, two countries have extremely long blackout periods. Embargoes are not the only difficulty many Latin American pollsters face and they say, more frequently than elsewhere, that polls generally have become harder to conduct in recent years.

Table 2 below summarises the number of blackout days reported for each nation that participated in the 1996, 2002, 2012 and/or 2017 studies, along with any changes in embargoes between the 2012 and 2017 studies. Among countries for which information was reported in both years, 16 changed from having no embargo in 2012 to having one or more blackout days in 2017. In contrast, only two nations reported that embargoes were eliminated over this time period. There were also several notable cases where embargoes were shortened by approximately two weeks, including Argentina, Greece, Honduras, South Korea and Ukraine. Increases in blackout periods of approximately two weeks in countries with embargoes in both years were reported by El Salvador, Singapore and Slovakia.

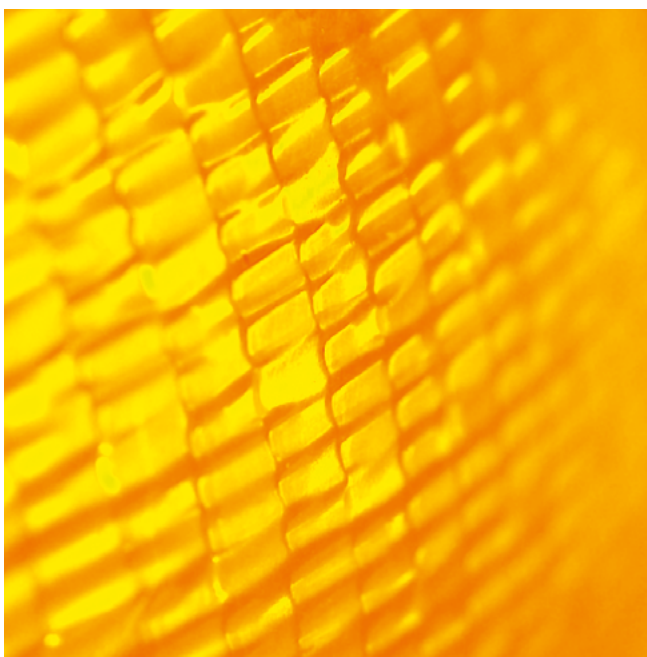


Table 2

Blackout period prior to elections in 1996, 2002, 2012 and 2017

EUROPE (n=41)					
	Number of days reported in each year				Change 2012-2017
	1996	2002	2012	2017	
Andorra	-	-	-	1	-
Austria	0	0	0	0	0
Belarus	-	-	-	5*	-
Belgium	0	0	0	0	0
Bosnia and Herzegovina	-	0	1	2	1
Bulgaria	1	7	0	1	1
Croatia	1	1	1	1	0
Cyprus	0	7	7	7	0
Czech Republic	-	7	3	3	0
Denmark	0	0	0	0	0
Estonia	0	0	0	0	0
Finland	0	0	0	0	0
France	7	1	0	2	2
Germany	0	0	0	0	0
Greece	0	15	15	1	-14
Hungary	-	-	-	2	-
Iceland	0	0	0	unknown	0
Ireland	0	0	-	0	-
Italy	28	15	15	14	-1
Kosovo	-	-	-	1	-
Latvia	0	0	0	1	1
Lithuania	-	-	0	0	0
Luxembourg	30	30	-	7	-
Macedonia	0	5	5	1	-4
Malta	-	-	-	1	-
Moldova	-	-	-	7	-
Montenegro	-	-	-	15	-
Netherlands	0	0	0	0	0
Norway	0	0	1	1	0
Poland	12	1	1	1	0
Portugal	7	1	1	1*	0*
Romania	-	2	7	2*	-5*
Russia	2	0	5	6	1
Serbia	-	-	2	1	1
Slovakia	-	14	0	14	14
Slovenia	1	7	0	1	1
Spain	5	5	5	5	0
Sweden	0	0	0	0	0
Switzerland	7	10	0	unknown	0
Ukraine	0	0	15	1	-14
United Kingdom	0	0	0	0	0

unknown = blackout status unknown (2017 only)

numbers in brackets differ from Table 1 as this table covers four reports

* = value imputed from www.aceproject.org

- = did not participate in survey year(s)

ns = length of blackout period not specified (2017 only)

NP = report no election polls (2017 only)

Table 2

Blackout period prior to elections in 1996, 2002, 2012 and 2017

LATIN AMERICA (n=19)					
	Number of days reported in each year				Change 2012-2017
	1996	2002	2012	2017	
Argentina	0	1	15	2	-13
Bolivia	2	2	-	30	-
Brazil	0	0	2	7	5
Chile	-	-	-	15	-
Columbia	7	1	7	7	0
Costa Rica	-	2	7	3	-4
Ecuador	-	-	15	8	-7
El Salvador	-	-	1	15	14
Guatemala	-	-	-	15*	-
Guyana	-	-	-	7	-
Honduras	-	0	45	30	-15
Mexico	7	7	3	4	1
Nicaragua	0	0	-	3	-
Panama	-	1	-	20	-
Paraguay	-	-	-	15	-
Peru	15	7	7	7	0
Suriname	-	-	-	unknown	-
Uruguay	15	7	2	4	2
Venezuela	15	2	7	7	0

NORTH AMERICA AND CARIBBEAN (n=8)					
	Number of days reported in each year				Change 2012-2017
	1996	2002	2012	2017	
Bahamas	-	-	-	0	-
Barbados	-	-	-	0	-
Canada	3	2	3	1	-2
Dominican Republic	-	-	0	0	0
Jamaica	-	-	-	0	-
Puerto Rico	0	0	-	-	-
Trinidad and Tobago	-	-	0	1	1
United States	0	0	0	0	0

ASIA, MIDDLE EAST AND EURASIA (n=42)					
	Number of days reported in each year				Change 2012-2017
	1996	2002	2012	2017	
Afghanistan	-	-	-	0	-
Armenia	-	-	-	1*	-
Azerbaijan	-	-	0	1*	1*
Bangladesh	-	0	0	0	0
Bhutan	-	-	2	-	-
Cambodia	-	-	0	-	-
P.R. China	-	-	0	NP	-
Georgia	-	0	-	2*	-
Hong Kong	-	-	0	0	0
India	0	0	0	2	2
Indonesia	21	0	0	7	7
Iran	-	-	-	0	-
Iraq	-	-	-	2	-
Israel	0	1	0	5	5
Japan	0	0	0	0	0
Jordan	-	-	-	0	-
Kazakhstan	1	0	0	5*	5*
Kuwait	-	-	3	0	-3
Kyrgyzstan	-	-	-	5*	-
Lebanon	-	-	-	10*	-
Macau	-	-	15	-	-
Malaysia	0	0	0	0	0
Maldives	-	-	0	-	-
Mongolia	-	-	-	7	-
Myanmar/Burma	-	-	3	ns	-
Nepal	-	1	0	0	0
Pakistan	0	0	0	1	1
Palestine	-	-	0	1	1
Philippines	0	0	0	0	0
Qatar	-	-	-	NP	-
Saudi Arabia	-	-	-	NP	-
Singapore	-	-	1	14	13
South Korea	0	23	21	7	-14
Sri Lanka	-	-	7	0	-7
Taiwan	0	0	10	10	0
Tajikistan	-	-	-	NP	-
Thailand	0	0	0	ns	-
Turkey	30	7	7	1	-6
United Arab Emirates	0	0	0	ns	-
Vietnam	-	-	-	NP	-
Yemen	-	-	-	0	-

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Table 2

Blackout period prior to elections in 1996, 2002, 2012 and 2017

OCEANIA (n=3)					
	Number of days reported in each year				Change 2012-2017
	1996	2002	2012	2017	
Australia	0	0	0	0	0
Fiji	-	-	0	7	7
New Zealand	1	0	0	0	0

AFRICA (n=26)					
	Number of days reported in each year				Change 2012-2017
	1996	2002	2012	2017	
Angola	-	-	-	ns	-
Botswana	-	-	-	0	-
Cameroon	-	-	-	90	-
Congo	-	-	-	3*	-
Cote d'Ivoire	-	-	-	2	-
Egypt	-	-	0	3	3
Ghana	-	-	-	ns	-
Guinea	-	-	-	0	-
Kenya	-	-	0	5	5
Lesotho	-	-	-	0	-
Libya	-	-	-	0	-
Mauritius	-	-	-	nts	-
Morocco	-	-	-	NP	-
Namibia	-	-	-	0	-
Nigeria	-	-	0	0	0
Senegal	-	-	-	0	-
Sierra Leone	-	-	-	0	-
Somaliland/ Somalia	-	-	-	0	-
South Africa	42	0	0	0	0
Sudan	-	-	-	NP	-
Tanzania	-	-	-	0	-
Togo	-	-	-	0	-
Tunisia	-	-	-	150	-
Uganda	-	-	-	0	-
Zambia	-	-	-	14	-
Zimbabwe	-	-	-	0	-

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DATA SOURCES: Spangenberg, F. (2003). The Freedom to Publish Opinion Poll Results: Report on a Worldwide Update. ESOMAR/WAPOR; Chung, R. (2012). The Freedom to Publish Opinion Poll Results: A Worldwide Update of 2012. WAPOR.



In Figure 4, blackout periods across the world are depicted by their length (none vs. 6 or fewer days vs. 7 or more days). This map clearly identifies Latin America as the region with the highest proportion of countries reporting any restrictions as well as the longest restrictions (i.e., of 7 days or more).

Globally, respondents in nearly four in ten of the countries in our study say it has become harder to conduct public opinion polls over the last five years. That includes a majority of Central American countries – where embargoes are the most severe – but also half of the European countries. The reasons differ from region to region.

Historically, the pattern of blackout periods has shifted in both directions. Respondents in nearly twice as many countries expect new or longer blackout periods to be imposed in

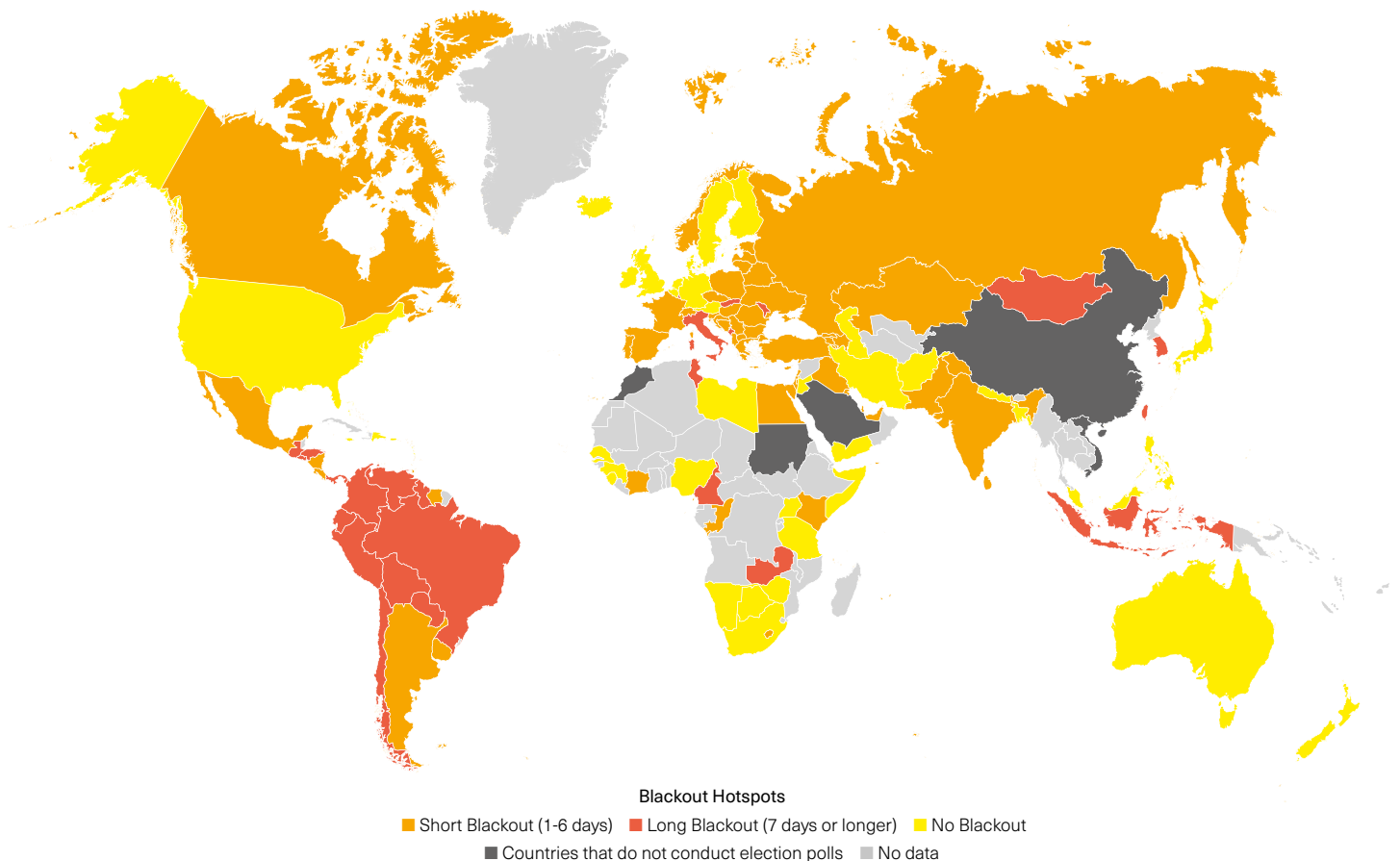
the next few years as expect embargoes to disappear or be shortened (although respondents in the vast majority of countries expect no change or say they don't know). Globally, just 8% of the countries surveyed expect new or longer pre-election blackout period will be imposed in the next few years.

But the picture is different in Latin America. Respondents in one in five South American countries expect an even longer embargo to be imposed in the next few years and none expect them to be shortened.

Long embargoes are often in countries where the government has a greater role in election polling than simply imposing a blackout period. This is particularly the case in Latin America where 41% respondents report there is a governmental body

Figure 4

Geographic distribution of countries reporting blackout periods



that controls the conduct of election polls compared to less than 20% of countries in the rest of the world (see Table 3). In Europe, self-regulation is more popular and professional associations are much more likely to handle complaints about opinion polling.

In over a quarter of countries in Africa, Asia and Latin America, new government regulations have affected the ability to conduct polls at least somewhat. A third of countries in Central America say that new government regulations affect the ability to conduct opinion polls a great deal.

Latin American countries also worry that data privacy as well as crime and security concerns seriously impact the ability to conduct polls with the latter seen as having a great deal of impact.

While government regulation may have the most impact in Latin America, reports of greater difficulty in opinion polling are also due to other issues. Worldwide, funding is most often cited as making it harder to conduct polling. Budget cuts and the increased cost of data collection contribute to the difficulty of conducting election polls in over half the countries studied, with declining response rates viewed as another serious concern in about half the countries.

Table 3

Combined responses to “In your country, is there a governmental body that is responsible for controlling the conduct of election polls?” (Q17) and “In your country, is there a professional association or other group that is responsible for addressing complaints about election polls?” (Q18)

	(n)	Neither %	Government body only %	Professional association only %	Both %
Africa	(23)	57	22	13	9
Asia, Middle East & Eurasia	(25)	84	8	8	0
Europe	(34)	44	9	35	12
Latin America	(14)	57	21	0	21
North America & Caribbean	(7)	57	14	14	14
Oceania	(1)	100	0	0	0
Total	(104)	60	14	17	10



Chapter 3: Where can exit polls be freely conducted and reported?

Exit polls have many important functions: well-conducted exit polls provide rapid information about the electorate's votes, and also explain the reasons for an election outcome. In countries where vote tabulation is very slow, the results of exit polls are the only source of public information about an election for days afterwards. Just as well-conducted pre-election polls can support the public's expectations about an upcoming election, well-conducted and accepted exit polls can satisfy public concerns about results in a timely manner.

Even where vote counting is fast, exit polls help to describe how various groups voted, and their results give voters the opportunity to explain the reasons for their vote.

In many places, there are government limits on how exit polls are conducted and whether or not they can be conducted at all.

In about a dozen countries we examined, they cannot be conducted at all (Table 4). Asia is particularly problematic: six countries forbid exit polling (PR of China, Mongolia, Qatar, Saudi Arabia, Singapore, and Vietnam). Cameroon, Columbia, Dominican Republic, Malta, Morocco, and Trinidad and Tobago also forbid exit polling. 20 other countries lack exit polls, simply because they have not been conducted thus far, not because of legal restrictions. Exit polls may appear to be less useful where election results are published very rapidly and can be difficult to conduct reliably in countries where the population is spread over a large territory. In 57% of the countries in the study, exit polls are conducted, though often with restrictions on their conduct.

Exit polls are conducted and unregulated in only about a third of the countries surveyed, forbidden in one in ten, and regulated in how they are conducted in more than a quarter. There are some countries where respondents were uncertain about local regulations.

Table 4
In your country, are there legal restrictions on the conduct of exit polls? (Q26)

	(n)	They cannot be conducted at all %	They cannot be conducted inside the polling station %	They cannot be conducted within a specified distance from the polling place %	No restriction but exit polls have not been conducted to date %	No restriction and some exit polls have been conducted to date %	Don't know %
Africa	(17)	12	12	0	29	18	29
Asia, Middle East & Eurasia	(29)	21	10	14	17	35	3
Europe	(39)	3	28	5	13	33	18
Latin America	(16)	6	31	6	6	38	13
North America & Caribbean	(7)	29	0	43	29	0	0
Oceania	(3)	0	0	0	33	33	33
Total	(111)	11	19	9	17	30	14

Regulations affecting how exit polls are conducted include whether interviewers are able to stand close to places where voters cast their ballots, so that they easily can recognise who should be approached to answer a questionnaire. In ten countries, there are legal limits on the distances from the polling station where interviewers must stand; in 21, interviewers must stand outside the polling place.

Laws regarding interviewer behavior at polling places and where interviewers are permitted to stand affect how well exit polls perform. In the United States, news organisations succeeded in the courts when they sued to challenge legal restrictions in Washington State. New state regulations, adopted after the 1980 election, forced interviewers to stand 300 feet (just over 90 meters) away from the polling place, and made it impossible to determine who was a voter and who was just passing by. The news organisations submitted relevant research linking the accuracy of the estimate of each polling place's vote totals to how close interviewers were to the polling location itself and won the case (see *Daily Herald Co. v. Ralph Munro*, 1984).

Restrictions still remain in some U.S. states, but news organisations routinely challenge those that forbid questioning voters more than 50 feet (15 meters) away from polling places. Many other countries have similar restrictions. Distance rules are more common for exit polls in Europe and North America. Surprisingly, perhaps, in many Latin American and Asian countries which allow exit polling, they are more likely to be without any restrictions other than with limitations such as interviewer location rules. An additional exit poll standard, sometimes voluntarily adopted and sometimes legislated, prohibits the reporting of exit poll results which project the outcome before voting polls are closed. Only in 23 countries are there no regulations or informal rules about when exit polls can be published.

In addition, in 23 countries, there are restrictions on publishing until specific local areas are closed (that includes the U.S., where states, not the federal government, determine at what time polls open and close).

Ten countries report that exit polls cannot be reported by the news media at all: Angola, Cameroon, Columbia, Costa Rica, Czech Republic, Kyrgyzstan, Malta, Morocco, Portugal and Turkey.



Chapter 4: Recent challenges for pollsters

What difficulties do pollsters confront – beyond government regulation? Half the countries in Europe say that polling has become more difficult in the last five years, since the last Freedom to Publish study was completed (Figure 5). However, according to respondents in two thirds of those same European countries, the quality of polling remains high.

Some of the biggest problems concern finding and interviewing poll respondents. Declining response rates make it much more difficult to conduct public opinion polls, impacting poll quality. This is viewed as a serious issue in 15 of the 39 European countries, and about one in four countries in North America and the Caribbean. Declining response rates are less problematic in most of the rest of the world. In Africa (8 in 10 say they are little or not a problem at all, compared to two-thirds in Oceania, and 50% in Asia and Latin America.

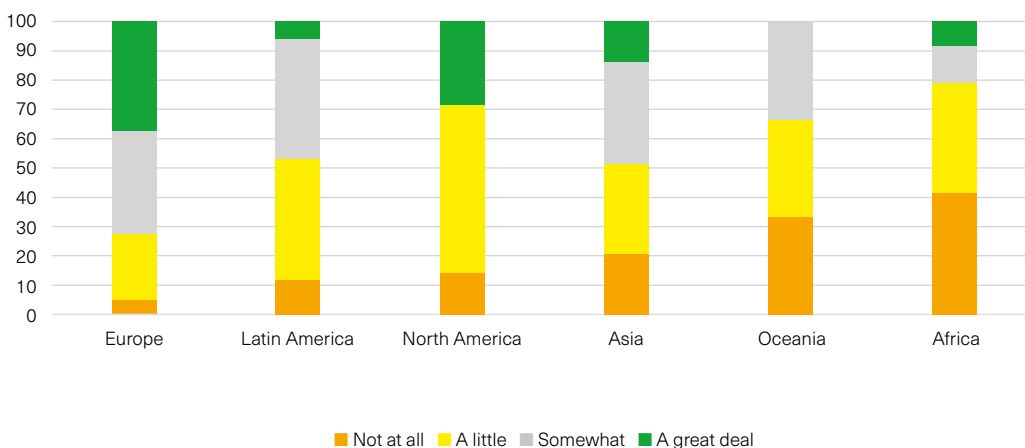
The impact of physical barriers (i.e. no access to buildings), insecurity and the fear of crime are most prevalent in Central America but also have higher than average impacts in the rest of the Americas and the Caribbean (Figure 6). There is far less concern about physical barriers to polling in Europe.

Despite worry about response rates, study respondents have few concerns about data privacy issues or increasing unwillingness among respondents to express their opinions. The greatest concern about this exists in the Central American countries of Latin America, where issues about physical barriers to interviewing and general insecurity over crime are also most common.

The much bigger concern worldwide is the rising costs of polling and declining response rates, making collecting

Figure 5

Perceived effects of declining response rates on difficulty of conducting public opinion polls (Q7a)



poll data more expensive coming at a time when polling budgets are being cut. In more than half of the countries surveyed, budget cuts and increased costs are perceived as having an impact on the quality of public opinion polls. In one in five countries, they are having a great deal of impact.

Europeans are most likely to think rising poll costs have a great deal of impact. Six in ten respondents in European countries say the increased cost of collecting data contributes to the difficulty of good quality polling. An even higher percentage in Africa say the same. In-person polling is most common in Africa, which could help explain the high concern with costs of data collection. European countries express the greatest concern about the impact of declining response rates, which also affect the costs of data collection. In nearly three of four countries in Europe, declining response rates were cited as

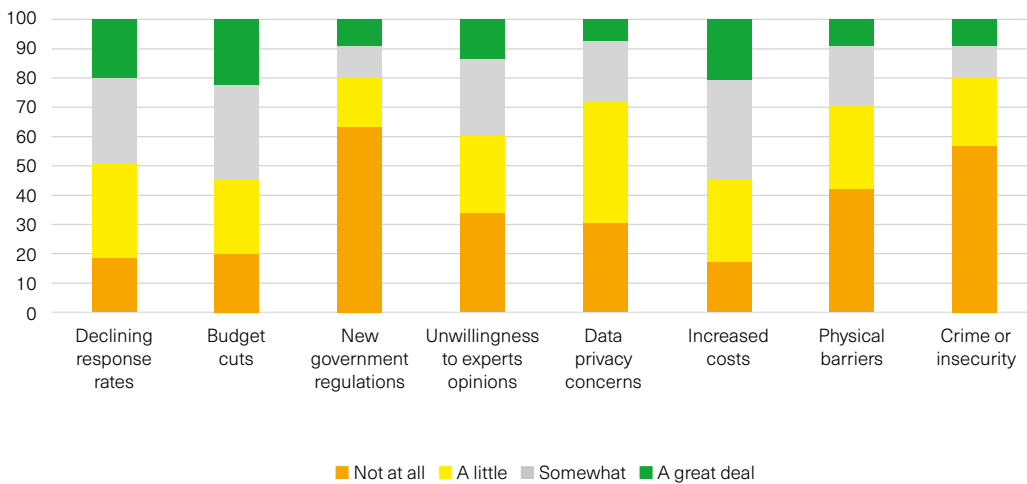
at least making it harder to conduct polls there. However, budget cuts can be said to be a global problem.

Improvements in methodology and poll quality come from training, and in about half the countries, there are courses and degree training for opinion pollsters offered by universities. Most of those are in Europe, North America or Asia. Less than half the countries in Latin America report university training programmes, and just one of those programs is in Central America. In Africa, only one in five countries report the existence of a university training programme. In a third of the countries, one is available in a nearby country. But that leaves a significant share of countries without easily reachable university training facilities.

Even fewer countries report training programmes outside the universities. Only a third say there is at least one.

Figure 6

“Regardless of general conditions, how much do each of the following contribute to making it more difficult to conduct public opinion polls in your country/region, compared to five years ago?” (Q7)



Chapter 5: The role of the media

To be able to judge the value of polling information, the public needs to see critical details of how a poll was conducted. This information is normally filtered through the news media. Our respondents (in this and the two previous studies) say they have little confidence in how news organisations report on polls.

They are fairly confident in the ability of pollsters in their countries to do a good job, but do not extend that positive feeling to the journalists reporting the polls. While only 10% of respondents assessed the general methodological quality of the polls in their country to be of low quality, nearly half (48%) assess the reporting of polls to be of low quality. While two-thirds of respondents said the methodological quality of polls in their country was good, only one in four rated the reporting as high quality (Figure 7).

Majorities worldwide (except in Central America) said polling methodology was of high quality in their country, though it varied by region on whether that quality was rated “very high” or “somewhat high.”

Only in North America and Oceania were majorities positive about reporting in their countries. Many respondents express negative reviews of the quality of poll reporting, and most of them describe it as of “somewhat low quality.” 16% say it is of “very low quality.”

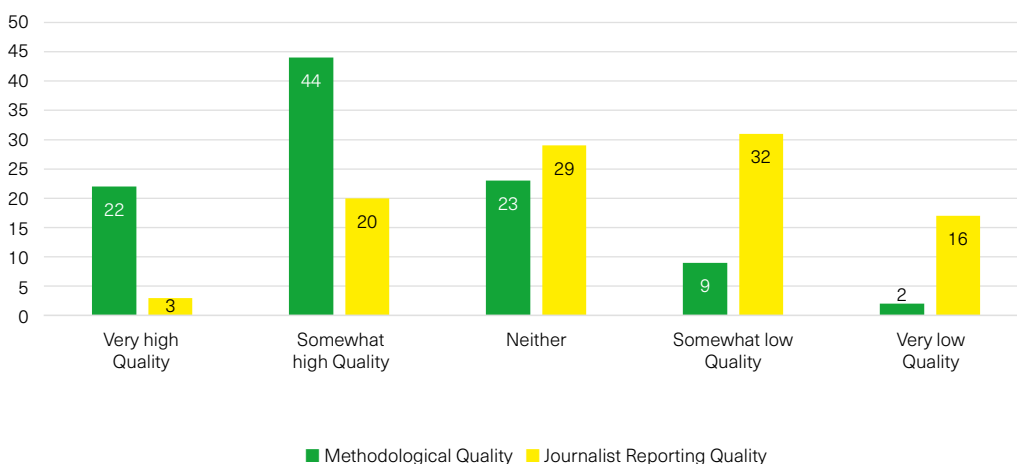
Poor reporting is widely attributed to a lack of understanding about polls in every single region – even in the most developed polling regions, like Europe (Figure 8). In three of four countries, “insufficient understanding of polls” is cited as contributing at least somewhat to the low quality of reporting. For one in three, this is said to contribute “a great deal.” In Europe, that figure was even higher, at 45%.

Majorities overall also noted that journalists did not report relevant details about polls and that only topline results are published.

Clearly, the goals of transparency in reporting and quality journalism about polling are not being met. (WAPOR and ESOMAR have taken steps to improve media coverage of

Figure 7

Rating of methodological and journalistic reporting quality of public opinion polls in country/region. (Q8 & Q9)



polling. In cooperation with the American Association for Public Opinion Research (AAPOR) and the Poynter Institute, they have produced a free international online training course, to help journalists understand polls and learn how better to report them. The course is available [here](#).)

In about one in five countries, there are legal requirements that published polls be accompanied by certain methodological information, including who commissioned the poll, the sample coverage, the margin of error, the dates of interviewing, and the method of interviewing, in order to help the general public assess how and why the poll was conducted. In only about one in ten countries, information about question wording and response rates is required reporting. In many countries, this

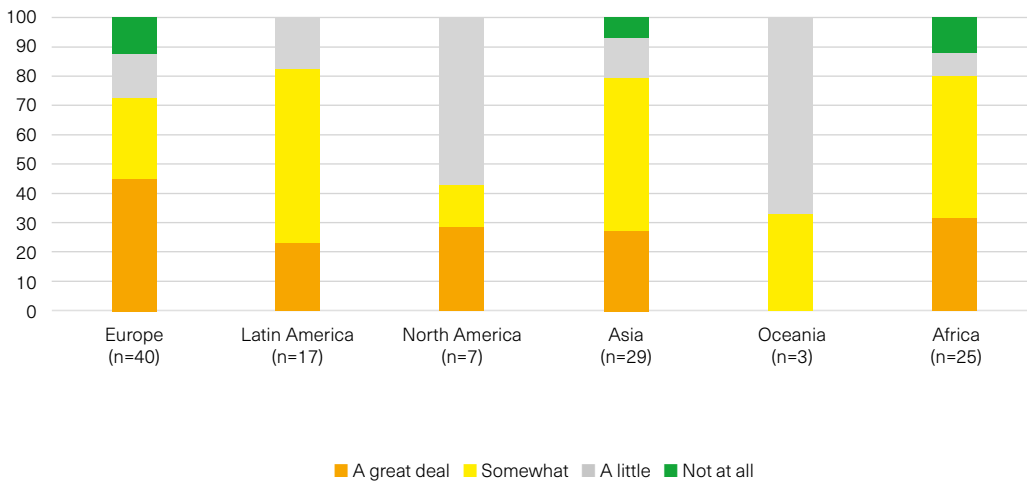
information is not legally required, but is published because of professional self-regulation.

However, valuable methodological information is not easily available. In only one in four countries respondents reported it was easy to access methodological information about most polls. This is more likely to be the case in Europe and North America, but even there, fewer than half the respondents thought that they could easily access this information. More often, the ability to do so depends on the individual pollster. The regions where information seems least accessible are Africa and Latin America.

In only 18 countries are polls archived for future analysis in a public and easily accessible data center.

Figure 8

“How much does insufficient understanding of polls contribute to the low quality of poll reporting in your country/region?” (Q10a)



Chapter 6: Self-Regulation and ethical awareness

The role of market and opinion research associations and self-regulation is key throughout the world. However, in only 29 countries is there a professional association or other group responsible for addressing complaints about election polls. In about as many countries (27), a government body controls the conduct of election polls. 12 countries have both.

More than half the countries with professional associations that deal with election polls are in Europe. Five African countries have such organisations, as do two in North America, and three each in Asia and Latin America. That is less than the number of countries in those latter regions that have government control. Two-fifths of the countries in Latin America say that a government body regulates polls.

In many places, especially in Asia and Africa there is neither government control nor a professional association recommending good practice in conducting or reporting election polls.

The consequence of having no professional organisation is that many of those conducting polls are unaware of existing

codes of ethics. Only four in ten of the study's respondents – individuals who are knowledgeable about the polling situation in their countries – say they are very familiar with the ICC/ESOMAR International Code on Market, Opinion and Social Research and Data Analysis, though the vast majority are at least a little familiar with it. About the same number are very familiar with the ESOMAR/WAPOR Guidelines for the Publication of Public Opinion Poll Results. Somewhat fewer are very familiar with WAPOR's Code of Ethics or its Guidelines for exit polls and election forecasts.

The existence of codes have their greatest impact in Europe, where not only are the codes well-known, but a third of respondents say most pollsters in their countries conform to them, and 55% say at least some do. This is the case in only a third of the African and less than half of Latin American countries represented.

Clearly, it is essential that ESOMAR, WAPOR and other relevant associations address these findings by working to better disseminate their professional codes of conduct as broadly as possible. We will address this challenge.



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Appendix 1. Survey Methods

A web-based questionnaire was developed for this study. The starting point was the 2012 Freedom to Publish questionnaire which was reviewed by members of the 2017 Advisory Committee, as listed in Appendix 4, who recommended a number of edits and updates. The general themes covered by the questionnaire, however, remained largely consistent with the earlier project. The questionnaire employed is presented in Appendix 2 & 3. The survey was approved by the University of Illinois at Chicago Institutional Review Board in June 2017, launched on July 11, 2017, and closed on October 1, 2017.

The survey's goal was to obtain expert responses for as many nations as possible. Potential respondents were identified using several sources. These included:

- National representatives and other active members of WAPOR and ESOMAR
- Other experts who had participated in the 2012 Freedom to Publish survey.
- Country representatives from the WIN and GIA networks, coordinated through Chiara Monetti.
- Persons identified online as national representatives to various international survey collaborations, including Afro Barometer, Arab Barometer, Asian Barometer, Eurobarometer, European Social Survey, European Values Survey, ISSP, Latin American Barometer, and the World Values Survey.
- Other survey experts identified through personal contacts of project director Timothy Johnson.

Invitations and several reminders were sent electronically to WAPOR and ESOMAR national representatives and then to other members of these associations and other survey experts residing in countries for which no response had been yet obtained. In addition, a member of the Advisory Committee,

Mari Harris of South Africa, kindly shared the questionnaire with colleagues in other African countries. As soon as a complete questionnaire was obtained from any country, no additional survey requests were sent to other potential respondents from that country.

The goal was to obtain one complete response from each country. A total of 191 online responses (and African and ESOMAR paper responses) were actually received, representing 133 individual countries. A protocol was established to determine which response would be included in the final survey database for each country from which multiple responses had been obtained. In effect, the procedure was:

- Where there were multiple responses for a given country, we focused on the objective question regarding blackout periods (see question 20 in Appendix 2) and conducted a web search to determine which completed questionnaires reported this information accurately.
- Where two or more responses from a given country provided accurate information regarding blackout periods, the most complete questionnaire (i.e., the questionnaire with the lowest item nonresponse rate) was included in the final database.
- Where two or more responses from a given country provided accurate information regarding blackout periods and were both complete, one was randomly selected for inclusion in the final database.
- When the expert respondent was unsure about blackout requirements, or the information was not reported, an internet search was conducted, and information was added from the ACE Project, Electoral Knowledge Network database.

As reported earlier, we obtained responses from 133 countries that are listed, by region, in Table A1 below.

Table A1
Participating countries/regions in 2017

AFRICA (n=26)	ASIA, MIDDLE EAST AND EURASIA (n=37)	EUROPE (n=41)	LATIN AMERICA (n=19)	NORTH AMERICA AND CARIBBEAN (n=7)	OCEANIA (n=3)
Angola	Afghanistan	Andorra	Argentina	The Bahamas	Australia
Botswana	Armenia	Austria	Bolivia	Barbados	Fiji
Cameroon	Azerbaijan	Belarus	Brazil	Canada	New Zealand
Congo	Bangladesh	Belgium	Chile	Dominican Republic	
Cote d'Ivoire	China	Bosnia and Herzegovina	Columbia	Jamaica	
Egypt	Georgia	Bulgaria	Costa Rica	Trinidad and Tobago	
Ghana	Hong Kong	Croatia	Ecuador	United States	
Guinea	India	Cyprus	El Salvador		
Kenya	Indonesia	Czech Republic	Guatemala		
Lesotho	Iran	Denmark	Guyana		
Libya	Iraq	Estonia	Honduras		
Mauritius	Israel	Finland	Mexico		
Morocco	Japan	France	Nicaragua		
Namibia	Jordan	Germany	Panama		
Nigeria	Kazakhstan	Greece	Paraguay		
Senegal	Kuwait	Hungary	Peru		
Sierra Leone	Kyrgyzstan	Iceland	Suriname		
Somaliland/Somalia	Lebanon	Ireland	Uruguay		
South Africa	Malaysia	Italy	Venezuela		
Sudan	Mongolia	Kosovo			
Tanzania	Myanmar	Latvia			
Togo	Nepal	Lithuania			
Tunisia	Mongolia	Luxembourg			
Uganda	Myanmar	Macedonia			
Zambia	Nepal	Malta			
Zimbabwe	Pakistan	Moldova			
	Palestine	Montenegro			
	Philippines	Netherlands			
	Qatar	Norway			
	Saudi Arabia	Poland			
	Singapore	Portugal			
	South Korea	Romania			
	Sri Lanka	Russia			
	Taiwan	Serbia			
	Tajikistan	Slovakia			
	Thailand	Slovenia			
	Turkey	Spain			
	United Arab Emirates	Sweden			
	Vietnam	Switzerland			
	Yemen	Ukraine			
		United Kingdom			

Appendix 2. Survey frequency distributions

Q2

Which of the following institutions commission public opinion polls in your country/region?

(n=116 countries)	Government national %	Government local %	Media TV %	Media print %	Political parties %	Private business %	Special interest groups, Not-for-profits %
Africa	48	35	70	63	61	75	100
Asia, Middle East & Eurasia	76	46	71	62	59	80	86
Europe	92	70	95	87	90	87	84
Latin America	100	80	88	93	100	93	100
North America & Caribbean	100	83	67	86	100	100	86
Oceania	67	67	67	100	67	67	100
Total	80	60	81	77	78	84	90

Q3

For which of the following topics are polls in your country/region conducted? (n=116 countries)

	Elections %	Political leaders %	Government %	Social issues %	Health policy %	Education %	Economy %	Environment %	Crime %
Africa	92	83	84	100	80	88	100	74	83
Asia, Middle East & Eurasia	84	68	91	97	91	94	100	71	73
Europe	100	100	100	92	95	95	100	87	84
Latin America	100	100	100	94	93	94	100	87	100
North America & Caribbean	100	100	100	100	86	86	100	100	100
Oceania	100	100	100	100	100	100	100	100	100
Total	94	88	94	96	90	93	100	81	85

Note: exact wording for each topic:

- Elections: Elections
- Political leaders: Evaluations of political leaders and parties
- Government: Opinion about government
- Social issues: Social issues (gender, employment, ethnic relations)
- Health policy: Health policy
- Education: Education
- Economy: Economic matters (State of the economy, employment, taxes, etc.)
- Environment: Environmental topics
- Crime: Crime

Q4

About how many companies conduct pre-election polls in your country/region?

	(n)	Just 1-2	3 to 5	5 to 10	More than 10
Africa	(22)	50	32	14	5
Asia, Middle East & Eurasia	(25)	24	40	12	24
Europe	(39)	8	36	41	15
Latin America	(16)	6	44	19	31
North America & Caribbean	(7)	14	57	0	29
Oceania	(3)	33	33	33	0
Total	(112)	21	38	23	18

Q5

Which of the following modes of administration are used to conduct public opinion polls in your country? (n=133)*

	In-person %	Online/web %	Telephone with landline phones only %	Telephone with mobile phones only %	Telephone with both landline & mobile phones %	Other %
Africa	96	46	19	50	27	4
Asia, Middle East & Eurasia	84	65	27	43	54	8
Europe	71	83	46	34	85	10
Latin America	84	42	26	16	37	0
North America & Caribbean	86	71	43	14	71	29
Oceania	67	67	33	33	100	0
Total	82	64	32	36	58	8

*Note: percentages do not sum to 100% due to multiple responses.

Q5a

Which mode would you say is the dominant mode (the one that is used most for public opinion polling)?

	(n)	In-person %	Online/web %	Telephone with landline phones only %	Telephone with mobile phones only %	Telephone with both landline & mobile phones %	Other %
Africa	(18)	39	0	33	6	22	0
Asia, Middle East & Eurasia	(27)	61	4	11	7	18	0
Europe	(37)	27	22	8	0	41	23
Latin America	(11)	64	0	0	9	27	0
North America & Caribbean	(7)	57	14	14	0	14	0
Oceania	(3)	0	33	0	0	67	0
Total	(104)	43	11	13	4	29	1

Q6

In general, would you say it is more or less difficult to conduct public opinion polls in your country/region now, compared to five years ago, or would you say that nothing has changed substantially?

[IF LESS DIFFICULT]: Would you say much less difficult or only a little less difficult?

[IF MORE DIFFICULT]: would you say much more difficult or only a little more difficult?

	(n)	Much less difficult %	Only a little less difficult %	Nothing has changed substantially %	Only a little more difficult %	Much more difficult %
Africa	(25)	16	20	36	8	20
Asia, Middle East & Eurasia	(31)	7	16	45	7	26
Europe	(39)	0	3	46	33	18
Latin America	(17)	6	24	29	12	29
North America & Caribbean	(7)	29	0	43	14	14
Oceania	(3)	0	0	33	67	0
Total	(122)	7	12	41	18	21

Q7

Regardless of general conditions, how much do each of the following contribute to making it more difficult to conduct public opinion polls in your country/region, compared to five years ago?

	(n)	Not at all %	A little %	Somewhat %	A great deal %
Budget cuts	(121)	20	26	31	23
Declining response rates	(120)	18	33	28	21
Increased cost of data collection	(121)	18	28	34	20
People's unwillingness to express their opinion, increasing numbers of undecided	(121)	35	26	26	13
New government regulations	(120)	63	16	12	9
Inaccessibility of some respondents due to physical barriers	(121)	43	29	19	9
Inaccessibility of some respondents due to crime or insecurity	(121)	57	23	11	9
Concerns about data privacy	(121)	31	42	20	7

Q8

How would you rate the general methodological quality of the public opinion polls published in your country/region? In general, are they of ...

	(n)	Very high quality %	Somewhat high quality %	Neither high nor low quality %	Somewhat low quality %	Very low quality %
Africa	(25)	36	40	8	16	0
Asia, Middle East & Eurasia	(30)	17	40	33	10	0
Europe	(39)	13	54	23	8	3
Latin America	(16)	19	38	31	6	6
North America & Caribbean	(7)	43	43	14	0	0
Oceania	(3)	33	33	33	0	0
Total	(120)	22	44	23	9	2

Q9

How would you rate the general quality of journalistic reporting of public opinion poll findings in your country/region's mass media? In general, are they of ...

	(n)	Very high quality %	Somewhat high quality %	Neither high nor low quality %	Somewhat low quality %	Very low quality %
Africa	(25)	4	16	16	36	28
Asia, Middle East & Eurasia	(30)	3	3	50	27	17
Europe	(39)	5	23	6	33	13
Latin America	(17)	0	24	35	35	6
North America & Caribbean	(7)	0	57	0	29	14
Oceania	(3)	0	67	0	33	0
Total	(120)	3	20	29	32	16

Q10

How much to each of the following contribute to the low quality of poll reporting in your country/region?

	(n)	Not at all %	A little %	Somewhat %	A great deal %
Insufficient understanding of polls	(121)	8	18	41	32
Polls not conducted frequently	(121)	36	22	26	15
Relevant details about polls (e.g., timing, sample) not reported	(121)	15	23	47	15
Only topline results reported	(121)	6	30	40	25

Q11a

Is there any university training (e.g., courses or degree programs) available for opinion pollsters within your country?

Q11b

Is there any university training available for opinion pollsters in nearby countries?

Q12a

Is there any non-university training (e.g., workshops) available for opinion pollsters within your country?

Q12b

Is there any non-university training available for opinion pollsters in nearby countries?

	% University training available		% Non-university training available	
	Within country	In nearby countries	Within country	In nearby countries
Africa	20	18	36	20
Asia, Middle East & Eurasia	47	31	53	22
Europe	67	31	45	8
Latin America	41	29	12	22
North America & Caribbean	86	0	43	25
Oceania	0	0	0	0
Total	48	25	39	18
(Total N)	(121)	(51)	(120)	(45)

Q13

Is the methodological information regarding polls published in your country easily available?

	(n)	Yes, easily (on pollsters' web sites, for example) %	Yes, but upon request and generally not easy %	Variable across pollsters %	Usually not accessible %	Don't know %
Africa	(25)	16	20	32	32	0
Asia, Middle East & Eurasia	(30)	23	17	40	20	0
Europe	(39)	36	18	36	8	3
Latin America	(17)	18	6	41	29	6
North America & Caribbean	(7)	49	14	29	14	0
Oceania	(3)	33	33	33	0	0
Total	(121)	26	17	36	19	2

Q14

Are poll data generally available for additional analyses or archived in a publicly accessible data center?

	(n)	Yes, and access is easy %	Yes, but access is difficult %	No, not to my knowledge %	Don't know %
Africa	(25)	16	32	48	4
Asia, Middle East & Eurasia	(30)	17	20	60	3
Europe	(38)	21	21	50	8
Latin America	(17)	0	18	82	0
North America & Caribbean	(7)	14	43	43	0
Oceania	(3)	0	0	67	33
Total	(120)	15	23	57	5

Q15

To what extent are you familiar with each of the following Codes and Guidelines?

	(n)	Not at all familiar	A little familiar	Somewhat familiar	Very familiar
ESOMAR/WAPOR Guidelines for the Publication of Public Opinion Poll Results	(120)	15	15	31	39
WAPOR Guidelines for exit polls and election forecasts	(121)	29	20	26	25
WAPOR Code of Ethics	(120)	28	18	22	33
ICC/ESOMAR International Code on Market, Opinion and Social Research and Data Analytics	(120)	22	16	19	43

Q16

In your opinion, do public opinion pollsters in your country/region generally conform to these codes and guidelines?

	(n)	Most pollsters conform %	Some pollsters conform %	Few pollsters conform %	None conform %	Don't know %
Africa	(25)	12	16	36	8	28
Asia, Middle East and Eurasia	(30)	10	33	33	10	13
Europe	(39)	36	21	23	5	15
Latin America	(17)	18	24	35	5	18
North America & Caribbean	(7)	14	57	0	0	29
Oceania	(3)	33	66	0	0	0
Total	(121)	21	26	28	7	18

Q17

In your country is there a governmental body that is responsible for controlling the conduct of election polls?

	(n)	Yes %	No %	Don't know %
Africa	(25)	28	64	8
Asia, Middle East & Eurasia	(29)	7	79	14
Europe	(39)	18	72	10
Latin America	(17)	41	53	6
North America & Caribbean	(7)	29	71	0
Oceania	(3)	33	67	0
Total	(120)	22	69	9

Q18

In your country, is there a professional association or other group that is responsible for addressing complaints about election polls?

	(n)	Yes %	No %	Don't know %
Africa	(25)	20	76	4
Asia, Middle East & Eurasia	(30)	10	87	3
Europe	(39)	41	49	10
Latin America	(17)	18	65	18
North America & Caribbean	(7)	29	71	0
Oceania	(3)	0	33	67
Total	(120)	24	67	9

Q20

In your country, is there a blackout period for pre-election opinion polls, during which polling results may not be released to the public?

Q21

[if Yes to Q20] How many days, prior to an election, is the publication of polls not permitted? (if there are different blackout periods for different elections, please refer to the election with the longest blackout period and specify the type of election)

	No blackout	Blackout 1-6 days	Blackout 7+ days	Blackout length unknown	Unknown if have blackout	No election polls	Median blackout days (range)*
Africa (n=26)	54%	15	12	12	0	8	5 (2-150)
Asia, Middle East & Eurasia (n=37)	32%	30	16	8	0	14	5 (1-14)
Europe (n=41)	27%	51	17	0	5	0	2 (1-15)
Latin America (n=19)	0%	26	68	0	5	0	7 (2-30)
North America & Caribbean (n=7)	71%	29	0	0	0	0	1
Oceania (n=3)	67%	0	33	0	0	0	7
Total (n=133)	33%	32	23	5	2	5	5 (1-150)

* Median is the value in the middle of a range

Q22

Within the next 3-5 years, do you expect any change in your country in the rules regarding the blackout periods before elections?

	(n)	Expect blackout period to be imposed %	Expect longer blackout period %	Expect no change %	Expect shorter blackout period %	Expect blackout period to be abolished %	Don't know %
Africa	(25)	8	0	56	0	4	32
Asia, Middle East & Eurasia	(35)	0	6	54	6	0	34
Europe	(41)	2	2	61	2	0	32
Latin America	(19)	0	21	63	11	0	5
North America & Caribbean	(7)	0	0	86	0	0	14
Oceania	(3)	0	0	67	0	0	33
Total	(130)	2	5	60	4	1	28

Q23

For the publication of public opinion polls in your country, which of the following must be disclosed, either because it is requested by law or because of self-regulation of the media or polling industry? (n=133 nations)

	Reporting legal requirement %	Reporting voluntary self-regulation %
Persons or agency that commissioned the opinion poll	22	65
Geographical coverage	23	69
Characteristics of the sample	20	68
Margin of error	20	59
Response rate	12	49
Mode of interview	20	68
Dates of data collection	21	69
Question wording	13	53

Q26

In your country, are there legal restrictions on the conduct of exit polls?

	(n)	Exit polls cannot be conducted at all %	They cannot be conducted inside the polling station %	They cannot be conducted within a specified distance from the polling place %	No restriction but exit polls have not been conducted to date %	No restriction and some exit polls have been conducted to date %	Don't know %
Africa	(17)	12	12	0	29	18	29
Asia, Middle East & Eurasia	(29)	21	10	14	17	35	3
Europe	(39)	3	28	5	13	33	18
Latin America	(16)	6	31	6	6	38	13
North America & Caribbean	(7)	29	0	43	29	0	0
Oceania	(3)	0	0	0	33	33	33
Total	(111)	11	19	9	17	30	14

Q27

Are there legal restrictions or self-regulations on the publication of exit polls by the media? (n=133 nations)

	Reporting legal restrictions %	Reporting self-regulation %
Exit polls cannot be published before all polls in the country close	33	20
Exit polls cannot be published before all polls in the polling are (state, district, region) close	17	11
Exit polls cannot be published by the media	8	9
No restriction	17	23
Don't know	16	22

Appendix 3. The 2017 Freedom to Publish questionnaire

The full questionnaire can be found at

www.esomar.org/wapor-esomar-questionnaire

www.wapor.org/publications/freedom-to-publish-opinion-polls/

Appendix 4. Advisory Committee 2017

Project team

- Timothy Johnson, University of Illinois at Chicago, WAPOR Standards Committee Chair, USA
 - Kathy Frankovic, Member of ESOMAR PSC and WAPOR, Independent Consultant (representing ESOMAR), USA
 - Mari Harris, IPSOS Public Affairs, South Africa, S. Africa
 - Jibum Kim, Sungkyunkwan University, S. Korea
 - Patricia Moy, University of Washington, USA
 - Anne Niedermann, Institut fuer Demoskopie Allensbach, Germany
 - Enrique Domingo, Chair of ESOMAR Professional Standards Committee, Spain
 - Kim Smouter, Head of Professional Standards and Public Affairs, ESOMAR
 - Ignacio Zusanabar, Universidad Católica del Uruguay, Uruguay
 - Claire Durrand, Université de Montréal, Canada
 - Kathy Joe, Past director of ESOMAR international Standards
 - Joke Ruwen-Stuursma, Professional Standards Executive, ESOMAR
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ESOMAR

ESOMAR is the global voice of the data, research and insights community. With more than 6,000 Individual Members and 600+ Corporate Members from 130+ countries, ESOMAR represents the interests of 45,000 professionals, all of whom agree to uphold the ICC/ESOMAR International Code.

ESOMAR promotes the value of market, opinion and social research and data analytics, and has been providing ethical and professional guidance to its global membership community for more than 70 years.

www.esomar.org

WAPOR

For 70 years, the World Association for Public Opinion has promoted the highest professional standards, ethics and techniques for polling around the world.

Our international membership represents the industry's most respected names in the survey and public opinion research field.

Through publications, seminars, meetings and educational initiatives we engage in a rich ongoing conversation about how best to collect data and maintain data quality not just in advanced democracies, but also in emerging democracies.

www.wapor.org