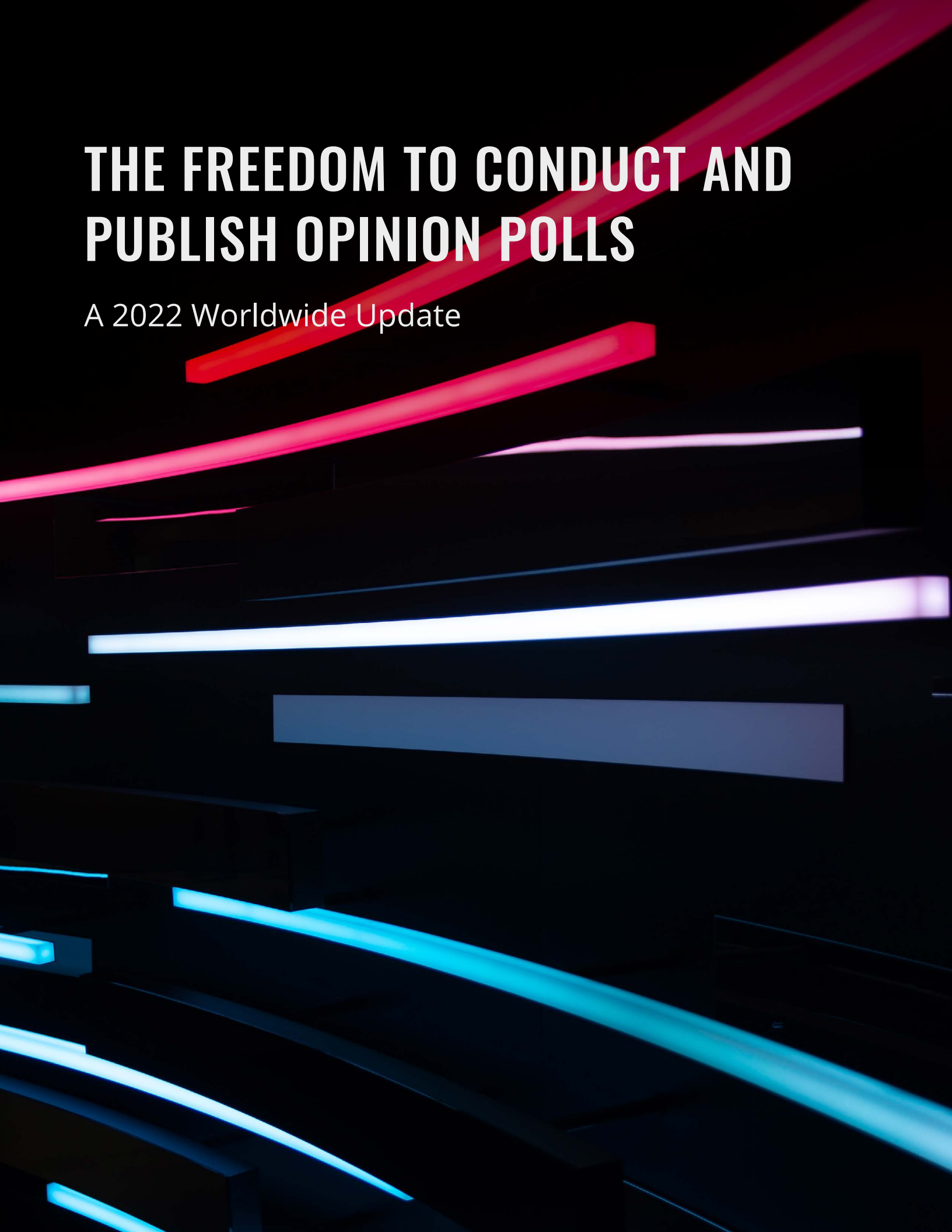


THE FREEDOM TO CONDUCT AND PUBLISH OPINION POLLS

A 2022 Worldwide Update



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ESOMAR and WAPOR express their gratitude to the Data Archivists of the World Values Survey Association at the JD Systems in Madrid, Spain for their kind support and assistance in conducting the online survey of opinion research experts

ESOMAR

WAPOR
WORLD ASSOCIATION FOR PUBLIC OPINION RESEARCH

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FOREWORD

Freedom to Conduct and Publish Opinion Polls

Opinion polling remains a challenging form of research - questions about reliability, validity, and authenticity – and yet, on review, many of these criticisms can be attributed to the interpretation of the poll findings, rather than the methodology itself.

This statement was true in 2017 for the previous iteration of this report. Today, in a world where the line between fact and opinion are blurred and where social media tends to polarize individuals, it is even more important to be able to rely on sound research and poll findings.

Despite the informational value polls bring, restricting 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 seventh in the Freedom to Conduct and 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.

ESOMAR continues to promote a unique reference database, launched in 2017. The database – compiled by Kantar Lightspeed and made available through ESOMAR – collated more than 35,000 published polls, and polls conducted closest to Election Day are closest to election results.

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 as a prerequisite for being accepted as members. ESOMAR has centralized material for the defense of polling on a new webpage, available to stakeholders worldwide to help them improve polls and defend freedom of polling.

The report will be used when advocating for the right to conduct opinion polls, including before elections, to highlight the role that social and opinion research in providing decision makers and the general public with access to reliable and objective measures of public attitudes.

ESOMAR will continue to support and promote the Freedom to Publish 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 Joaquim Bretcha, Director-General

ESOMAR

FOREWORD

Freedom to Conduct and Publish Opinion Polls

WAPOR was established in 1947. Exactly halfway in this long history, in 1984, it conducted its first worldwide study on the freedom to publish polls. Over the past 25 years, this study has become a regular exercise once every 5 years. Last year, WAPOR celebrated its 75th anniversary with a conference theme of “75 Years of Worldwide Public Opinion Research,” and its core values of Liberty, Quality, and Humanity were reaffirmed. As written in WAPOR’s Constitution, “Public opinion is a critical force in shaping and transforming society. Properly conducted and disseminated survey research provides the public with a tool to measure opinions and attitudes in order to allow its voices to be heard.”

Again, in cooperation with ESOMAR, WAPOR conducted the latest of seven studies of the freedoms to conduct and publish opinion polls around the world, this time based on the knowledge of 200 opinion researchers in 157 countries across six continents. In terms of geographic coverage and questionnaire content, this is the most extensive study to date of our profession’s freedoms (or lack thereof) and our wellbeing.

While opinion polling has been expanding globally over the past few decades, we are realistic about the challenges facing us as professors, or survey practitioners, or users of polling data. We are facing rising restrictions from authoritarian governments; crime and violence are threatening our interviewers who are out knocking on doors; respondents are becoming increasingly unwilling to answer their phones when we call; and disinterest is rising among readers/viewers who doubt the validity of experts generally and the accuracy of our polls.

However, other trends favor our ability to conduct and publish our polls: almost universal mobile phone ownership, rising internet access, acceptance of online polling both by clients and survey respondents, and increased funding for research, particularly for humanitarian studies, during and even after the pandemic.

Looking ahead, key drivers suggested by the survey of our activity at WAPOR are going to be educational. We will use the best tools at our disposal (e.g., webinars, electronic publications, hybrid and inclusive conferences) to broaden awareness among the general public, journalists, and government officials about How and Why opinion polls are conducted and published in order to allow people's voices to be heard.

Foreword by Dr. Robert Chung, President of WAPOR



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INTRODUCTION: WHY POLLING MATTERS

Public opinion polls and surveys examine issues that can arouse great public interest. They are part of the social and political landscape in most of the world. They are often widely published and debated, and sometimes they are subjected to governmental restrictions - especially when it comes to the publication of poll results before elections and the prior review of survey questionnaires. 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 these governmental restrictions throughout the world.

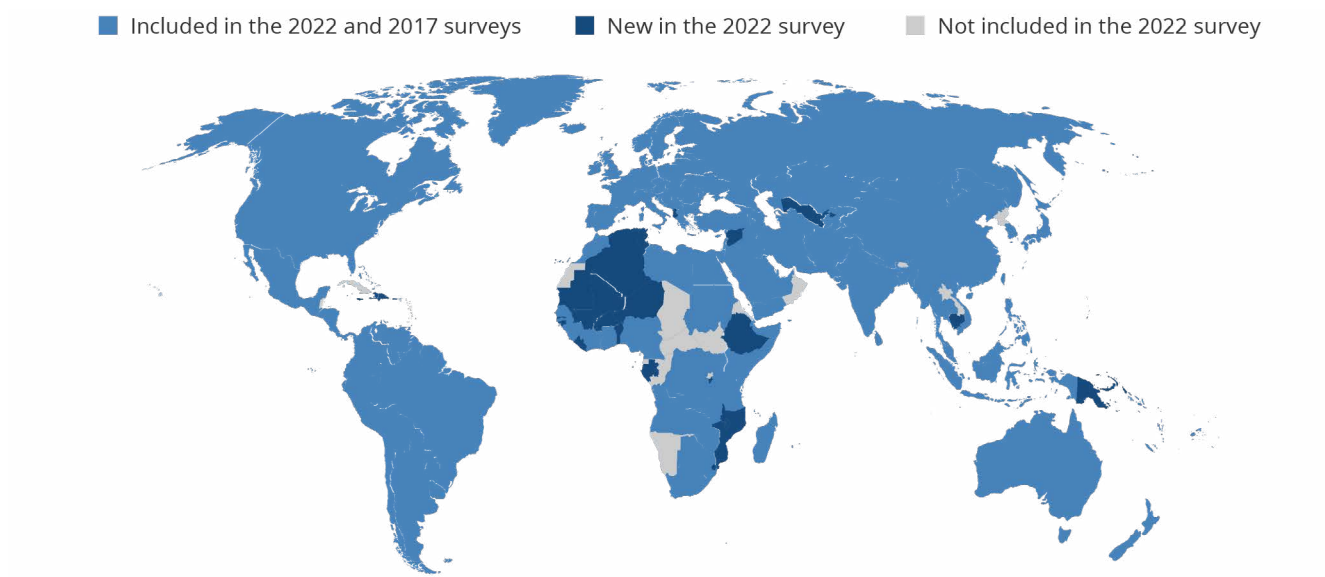
This report covers the landscape for polling in 157 countries, making it the most extensive global review by these organizations. Practitioners in the 157 countries provided information about government laws and regulations concerning the freedoms to conduct polls and publish polling results, regulation of the industry, polling methods, the role of international associations and guidelines, the quality of media coverage of polls, and the availability of training for pollsters and journalists.

This most recent report needs to be read by government decision-makers and journalists, as well as by researchers. WAPOR and ESOMAR have promoted high quality research and the importance of free publication of results since their founding three-quarters of a century ago. The organizations have stressed the belief 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 among other things, polls transmit citizens' goals, attitudes, and desires to governments and political parties. Polls improve governments' and parties' ability to represent and serve voters (which may also help them gain popular support and win elections).

This report is the seventh in this series of studies. It features current reports from 157 countries, nearly 20% more than the last report and more than three times as many as the 45 countries (mostly from the Western Hemisphere) in the first study in 1984.

INTRODUCTION: WHY POLLING MATTERS

Figure 1: 2022 Global Coverage Map



This study is truly global, with significant coverage in Sub-Saharan Africa, West Asia & North Africa, Asia Pacific Oceania, Europe, Latin America, and North America & the Caribbean. This year, once again, the share of countries with restrictions on poll publication, though lower than in 2017, remains a majority. Seventy-three countries (46%) report some sort of an embargo, and another 24 (15%) have no election polls whatsoever. Only 34% of countries in this study have election polls and can publish their results without any government-imposed pre-election blackout periods.

There are other sources of government interference on the free publication of polling results: limits in what can be asked, government supervision of polling, and prosecutions of those conducting or reporting public opinion results.

All of this is in addition to other hardships and risks pollsters face as they do their job, many of which are discussed in this report.

This report is also important because threats of government punishment for those conducting public opinion and election polls continue even today. This year and last year, political leaders in countries like Brazil and Greece raised the possibility of pollsters being punished with fines or even jail if their polls did not match election outcomes. Russia has declared one of its most prominent independent polling organizations a “foreign agent.”

In more than 85% of these countries, polls are used in evaluating public opinion about government, political participation, and social

INTRODUCTION: WHY POLLING MATTERS

and economic issues. Recently, polls were used to understand the spread of COVID-19 and the impact of the pandemic.

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 six countries – Angola, Honduras, Kyrgyzstan, Madagascar, Morocco and Mozambique. In another eleven (Chile, El Salvador, Greece, 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.

Places where pollsters can conduct polls in the days before elections but cannot publish them beforehand create inequality in access to critical information. Pollsters can only share results with their clients, and only those who can pay have access. The public - without pre-election poll information - has little or no opportunity to prepare 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 contest. 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. Longer embargoes are particularly problematic in multi-party elections, where many voters want to cast strategic votes. However, even in countries where polls abound and are freely published, misinformation can lead to political protests and violence, such as the storming of the US Capitol on January 6, 2021.

Historically, well-designed and methodologically sound election polling has been exceptionally accurate, despite a few high profile off-target estimates. The success of pre-election polls, measured by their matching election results, has changed little in recent years. Over the long-term, polling in the last week of election campaigns has become even more accurate.¹

¹ Jennings and Wlezien, 2018 and Jon Puleston, 2017 and 2023, <https://esomar.org/code-and-guidelines/opinion-polls-and-published-surveys/can-i-trust-polls>.

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

There are both positive and negative findings in this latest ESOMAR/WAPOR study on the Freedom to Conduct and Publish Opinion Polls, the largest and most global of this series of studies, which began in 1984. The new study has more respondents, more question topics, and more information than ever before about the status of polling in the world. WAPOR and ESOMAR will supplement this report with additional information provided on each organization's website.

Methods of polling are changing. In 2017, relatively few countries were using online polling as a research method. Now, more than three-quarters do (with a high of 92% in Europe, where it has replaced telephones as the dominant polling mode). In-person interviewing has remained a dominant method everywhere but Europe. Telephones - landline, mobile, or in combination - have declined from 46% in 2017 to 35% today as the dominant mode of interviewing.

The positives:

- There is more awareness and understanding of international codes and guidelines. For some guidelines, awareness has doubled from what it was in 2017. But conformity with the codes is still lacking among many pollsters.
- Evaluations of the methodological quality of published opinion polling are generally high. In only 13% of countries is it considered of somewhat or very low quality (in Latin America and Asia Pacific Oceania one in five countries see low quality polling).
- Technological changes have helped make polling easier, and the COVID-19 pandemic brought some positive benefits to polling, along with the expected negatives.
- Professional associations that can address complaints about polls exist in only 30% of countries. While that is up from 24% in 2017, it is still smaller than the number of countries where a government body regulates polling.

Among the negatives:

- Although the share of countries with limits on the publication of pre-election polls has dropped to 46%, an additional 24 countries (15%) do not permit election polling at all.
- Governments in one-third of countries officially regulate polls.
- More than one in four countries have taboos on publishing surveys about religion, and one in five reject polling on crime and on voting.
- Many countries do not have access to in-country training in survey research.
- In 43% of the 157 countries, the quality of reporting about polls in the news media is

EXECUTIVE SUMMARY

rated as somewhat or very low quality, nearly twice as high as the share of countries who see local journalistic reporting as of somewhat or very high quality.

- Polling itself has become more difficult due to budget cuts, increased costs of data collection, and lowered response rates.

Regions like Latin America stand out as different in many areas. Latin America has the highest share of countries with pre-election poll embargoes. Nearly all countries report embargoes, and it is the region where embargoes are the longest on average (the median embargo length is seven days, though polling is more accurate the closer to election day it is conducted). In addition, more than any other region, Latin American countries report that personal interviewing is not safe. Nearly half of countries there (47%) believe that interviewers conducting face-to-face surveys are either somewhat or very unsafe, almost three times the global percentage.

Europe is the region with the second largest percentage of embargoes (behind Latin America), but for half of those countries, the restrictions on

publication last only two or three days. European countries, as well as those in Sub-Saharan Africa and North America & the Caribbean, are also the most likely to have professional associations to deal with complaints about polling and to promulgate standards.

While it appears from the tables that parts of Asia Pacific Oceania and Sub-Saharan Africa might not have pre-election restrictions on the publication of polls, in nearly a third of those countries in West Asia & North Africa and Sub-Saharan Africa, it is not permitted to publish polls about elections and voting (in about a quarter of countries in those two regions, polls about voting cannot even be conducted).

ESOMAR and WAPOR plan to use these results to publicize issues about polling regulations and the value of self-regulation. Polls provide a voice for the public and are an important means of letting both leaders and the public themselves understand what people want and need.

01

WHO CONDUCTS ELECTION POLLS – AND WHY?

WHO CONDUCTS ELECTION POLLS – AND WHY?

Election polls seem to be everywhere. That statement is true for many countries. Where there is polling, in most countries, polls are conducted by governments, by businesses, and by the media, with media polling especially common in Europe, North America & the Caribbean, Latin America, and Oceania. But while many polls are conducted, the number

of organizations conducting pre-election polls hasn't changed all that much in the last five years. Compared to 2017, slightly more countries in 2022 have six or more organizations conducting pre-election polls, and incrementally fewer have five organizations or fewer conducting such surveys.

Table 1: “About how many companies conduct pre-election polls in your country?” 2017-2022*

	2017	2022
Only 1-2	21%	20%
3-5	38%	35%
6-10	23%	25%
More than 10	18%	20%

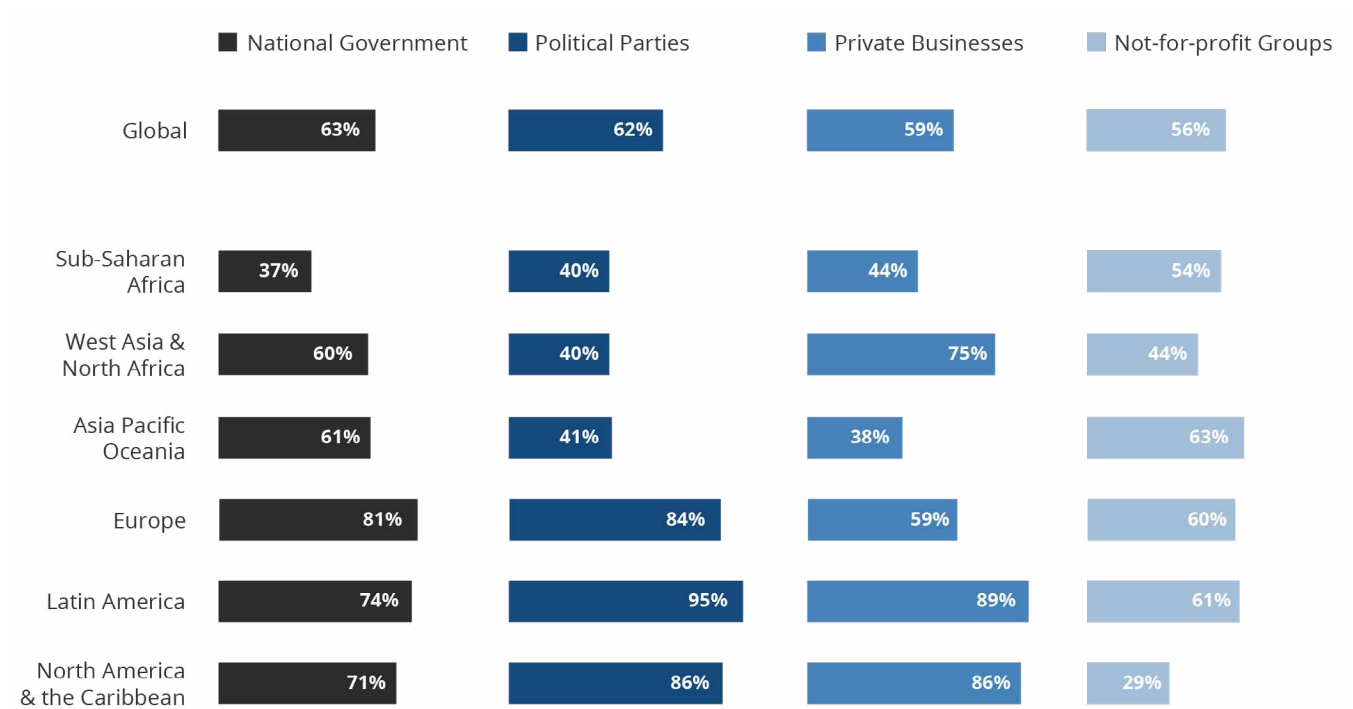
*Non-response has been set to missing.

In Sub-Saharan Africa, 80% of countries have fewer than five organizations conducting pre-election polls; in nearly half of countries in that region (45%), only one or two organizations are conducting pre-election polls, not much different from five years ago.

Polling is done by many different organizations and for many different purposes. Throughout the world, national governments, political parties, for-profit businesses, and not-for profit organizations are more likely than local governments to commission polls, and business, non-profits, and the media more often commission polls than any level of government in Sub-Saharan Africa.

WHO CONDUCTS ELECTION POLLS – AND WHY?

Figure 2: “Which of the following institutions commission public opinion polls in your country?”

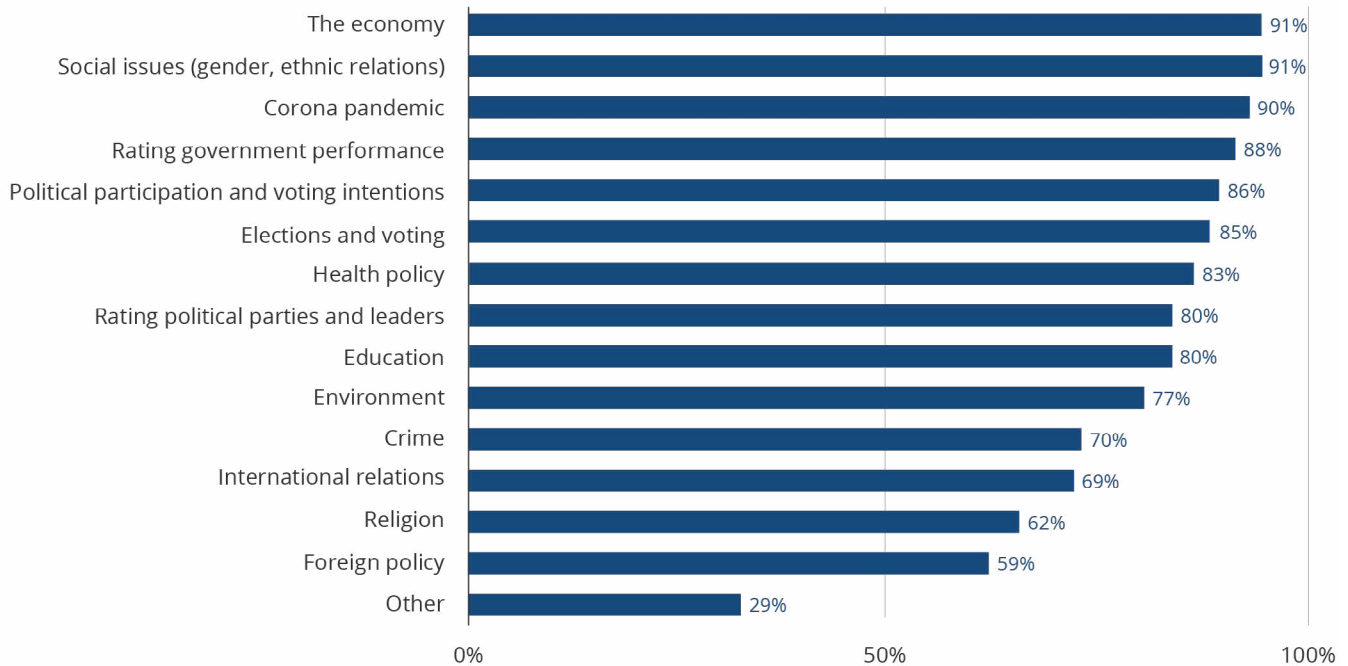


In Sub-Saharan Africa, just 37% of national governments commission their own polls. Not-for-profit groups (some of which may be headquartered outside the region) are more likely to conduct polls there: 54% of Sub-Saharan African countries report that not-for profit groups poll in their country.

In nearly every country in our survey, public opinion polls are used for much more than elections. Figure 3 underscores their importance in helping decision-makers take into account the public’s needs and desires. In over 85% of all countries, polls are used to evaluate public opinion about social issues, government performance, economic concerns, and the most important health issue of the 2020’s – the coronavirus pandemic.

WHO CONDUCTS ELECTION POLLS – AND WHY?

Figure 3: “About which of the following topics are polls in your country conducted?”



In Europe, Latin America, and North America & the Caribbean, polls about political issues are dominant. All countries in Latin America and North America & the Caribbean conduct polls about voting, political participation, and evaluations of government and political parties. Nearly all (more than 90%) of countries in Europe do so. Polls on these subjects are much less common in Sub-Saharan Africa and Asia Pacific Oceania, though political polls are conducted in a majority of those countries.

Nearly all countries used polling to understand the public’s response to the COVID-19 pandemic.

All of the countries in North America & the Caribbean did. So did 96% in Europe, 93% in Asia Pacific Oceania, 89% in Latin America, 81% in Sub-Saharan Africa, and 83% in West Asia & Northern Africa.

Overall, about half the countries have media polls, at least for print or broadcast. But there is less polling conducted by the media in Sub-Saharan Africa and Asia Pacific Oceania than in the rest of the world. In those regions, fewer than half the countries have media polls, either conducted for television or for print.

02

WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

WHERE CAN POLL RESULTS BE FREELY CONDUCTED AND REPORTED?

Many of the 157 countries place limits on conducting and publishing opinion polls. Polling can be limited officially by government fiat, and unofficially by pollster hesitation in asking certain questions or reporting certain results. In some countries, the limitations take the form of legislation, while in others, they are limits self-imposed by researchers. In well over a dozen countries, there simply are no election polls. In one-third of the countries in the report, governments have created bodies to supervise or manage polls. And in a few of the 157 countries, there have been prosecutions of those conducting and/or reporting polls. Restrictions add to the growing difficulties faced by public opinion researchers.

PREVENTING PUBLICATION OF PRE-ELECTION POLLS

In the 2002 Freedom Report, just under half the countries reported some type of poll publication embargo prior to elections. The same was true in the 2012 Freedom Report, when nearly half the 85 countries studied imposed some sort of blackout

period. The 2017 Freedom Report, which expanded the coverage to 133 countries, also found the largest share of countries with government limits on publication.² Sixty percent of the countries in 2017 reported an embargo on poll publication before elections. In an additional 5%, no pre-election polls were conducted, leaving pre-election poll information unrestricted in only one-third of the countries polled. (The reporting countries differ in each study, limiting direct comparison.)

In this study, which is the largest of the series, election poll reporting blackouts are less dominant than they were in 2017, although (as in most previous studies), blackouts are known to exist in nearly half the countries (46%). As seen in Table 2, they are dominant in two regions: Latin America (79%) and Europe (65%). The difference between these two regions is in the length of blackouts. In Europe, most blackouts last less than a week (and in many places, only a day or two). In Latin America, the median publication embargo is a full week.

² The past four Freedom Reports can be accessed here: <https://wapor.org/publications/freedom-to-publish-opinion-polls/>

WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

Table 2: “How many days, prior to an election, is the publication of polls not permitted?”

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
No blackout	34%	49%	19%	39%	29%	16%	71%
Blackout 1-6 days	25%	6%	24%	13%	47%	32%	14%
Blackout 7+ days	18%	9%	19%	13%	18%	47%	15%
Blackout length unknown	2%	8%	0%	0%	0%	0%	0%
Unknown if have blackout	6%	14%	0%	8%	2%	5%	0%
No election polls	15%	14%	38%	27%	4%	0%	0%

While it appears that embargoes are infrequent in Asia Pacific Oceania and Sub-Saharan Africa, that is in part because in at least a fifth of all countries in those regions (and more than a third in Asia Pacific Oceania and West Asia & North Africa), there was either no information or no election polling conducted. Globally, two dozen countries may not be conducting any election polls, though information is incomplete.

The contrast between the limitations on pre-election poll publication in Latin America and in Europe is striking, and with very few exceptions, there has been little change in this pattern since 2017. But while the percentage of countries in Latin America reporting pre-election poll

publication embargoes is sizable, it is no longer the case (as it was in 2017) that every Latin American country limits pre-election poll publication. However, while the median embargo in Europe is three days (with a few countries like Greece, Italy, and Slovakia reporting two-week embargoes), in Latin America, embargoes can last as long as 30 days, with a median embargo of one week.

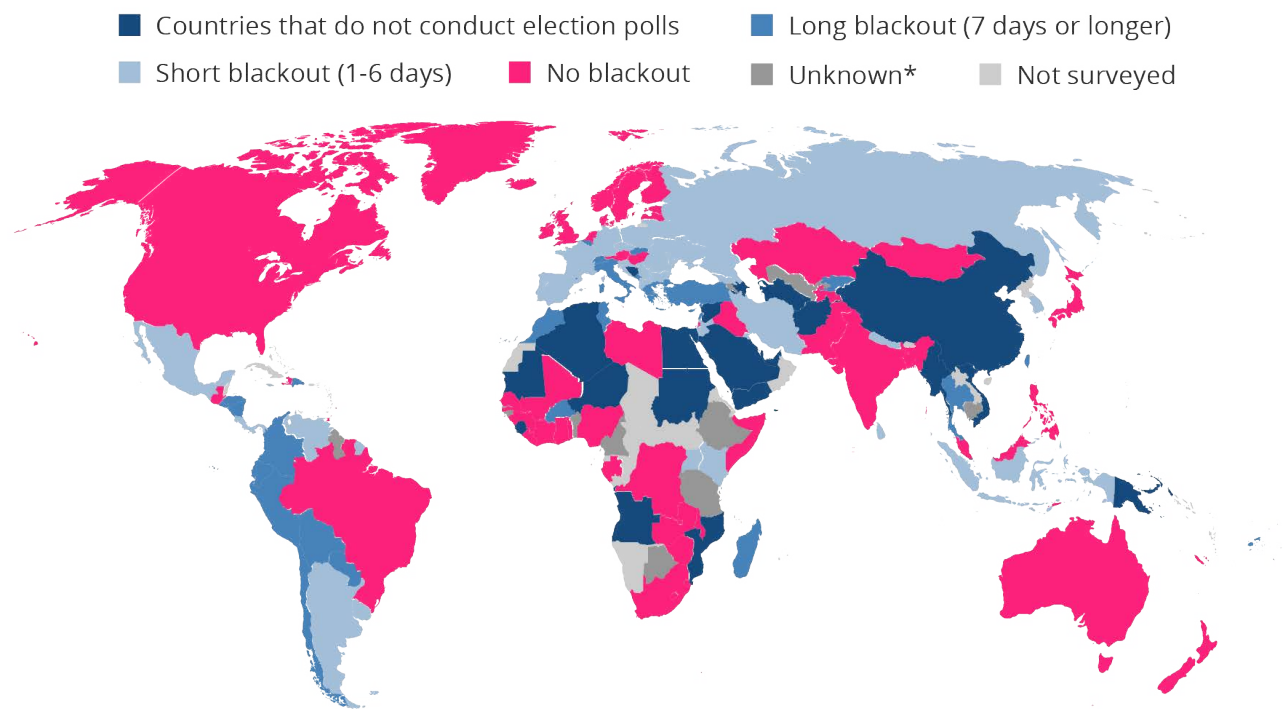
The changes in the existence and the length of poll reporting blackouts from five years ago move in both directions. Table 3 at the end of this chapter summarizes the number of blackout days reported for each nation that participated in any study from 1996 to the present. Among the 130 countries for which information was

WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

reported in both 2022 and 2017, approximately the same number of countries reported that embargoes were eliminated or shortened over this time period as reported increased embargo periods. There were several notable cases where embargoes were shortened by a week or more, including Brazil, El Salvador, Tunisia, and Zambia.

Increases in blackout periods of a week or more in countries with information in prior years were reported by the Dominican Republic, Kyrgyzstan, and Thailand, for example. The data on blackout periods for all surveyed countries back to the 1996 survey are shown at the end of this chapter in Table 3.

Figure 4: Geographic distribution of countries reporting blackout periods



*This category aggregates cases for which the blackout status is unknown and cases for which the length of the blackout period is not specified.

WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

The pattern of changing publication embargoes in this report is mixed. Compared to five years ago, it appears about as many countries for which data exists in both years have established or extended blackouts as have shortened or abolished them. Just as in 2017, there is no clear direction for the changes in government limits on pre-election poll publication.

In most countries, experts don't expect much change in those rules in the future either. Eight percent believe existing blackout periods will be shortened or abolished, while 5% think they will be lengthened or imposed, again underscoring the mixed direction of legal limitations. Five years ago, Latin America was particularly pessimistic about the extension of publication embargoes. Today, while Latin America is more likely than other regions to expect some change in publication limits, more expect the loosening of rules (16%) than the extension of them (10%).

LIMITING EXIT POLLS

There are no restrictions on conducting exit polls where voters are interviewed as they leave the polling place on election day in just over half of all countries. However, in two out of five of those countries, exit polls, while not restricted by laws, have not as yet been conducted. In 11% of countries, exit polls cannot be conducted at all, and in a quarter, there are restrictions on where exactly an interviewer can stand to interview voters.

Publication of exit poll results is even more restricted. In two-thirds of countries where exit polls are conducted, there are limits on when exit poll results can be published; that restriction usually forbids reporting until polling places are closed. In most of those countries, publication restrictions are mandated by law, and in the rest, publication limits are agreed on by pollsters themselves.

OTHER GOVERNMENT POLLING LIMITS: HOW IMPORTANT IS SELF-REGULATION?

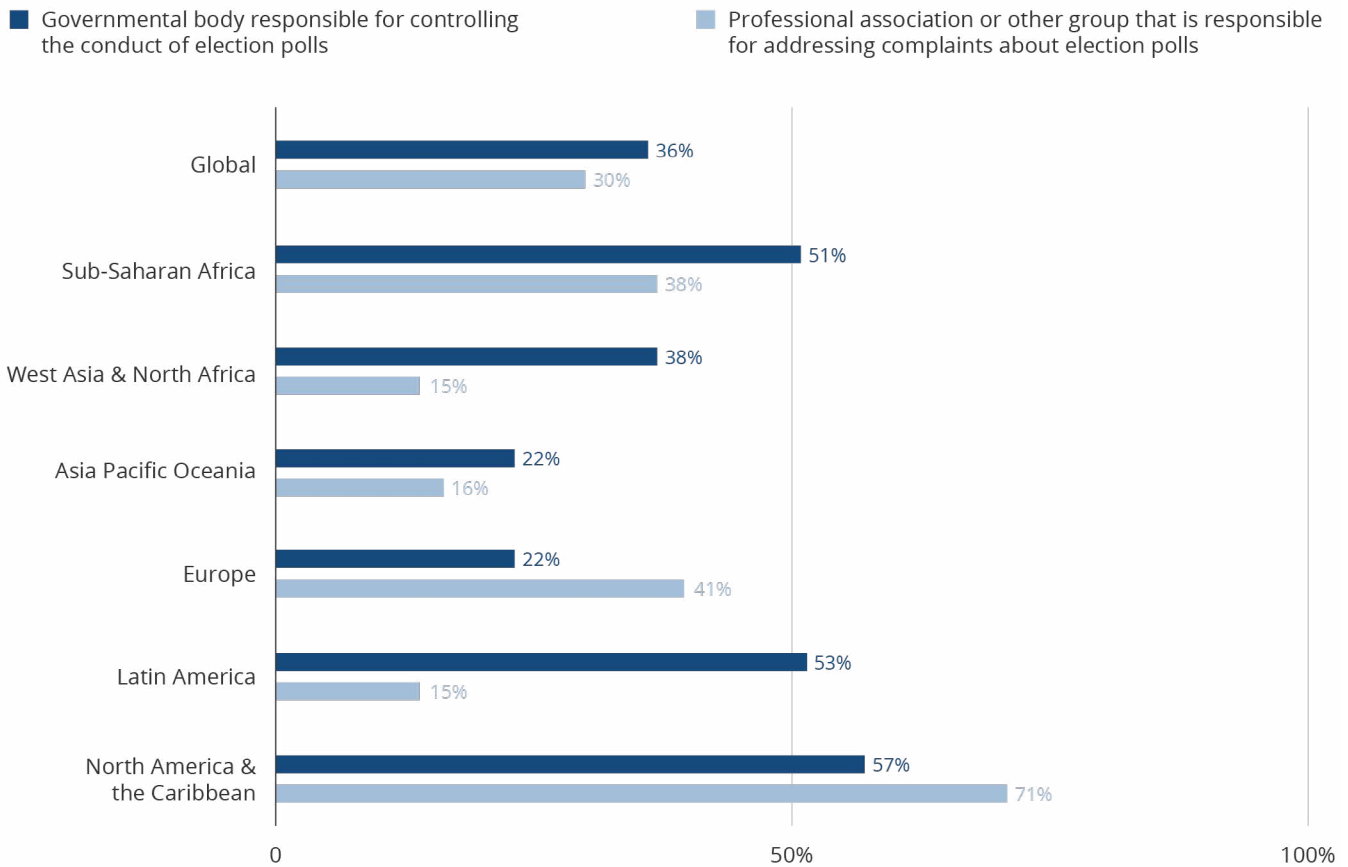
In more than a third of countries (36%), there is a government body that has authority over polling. The share of countries that have such bodies is higher in Sub-Saharan Africa, Latin America, and North America & the Caribbean. But in North America & the Caribbean, there are even more countries with self-regulation: 71% of countries there have a professional organization with responsibility for addressing complaints about opinion polling, nearly twice as many than in any other region. Overall, however, there are more countries where government bodies have authority over election polling than there are countries where that self-regulation is done by professional, non-governmental bodies.

WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

One example of self-regulation comes from Austria: The Austrian Association of Market Research and Public Opinion Institutes (VdMI) requires that an opinion poll about election and voting intentions not be conducted solely online. This means that in most cases institutes choose online and telephone together, with online being the dominant mode.

A somewhat larger share of countries in 2022 than in 2017 report the existence both of a government body regulating polls and a professional association managing complaints about polling. In 2017, the percentages were 22% and 24% respectively.

Figure 5: “In your country, are the following entities present that are responsible for controlling the conduct of / addressing complaints about election polls?” [Reporting “Yes” values]



TABOO SUBJECTS

What questions cannot be asked? The good news for those who support good and accurate measurement is that, in the vast majority of countries, there are no limits on the subjects that can be included in opinion polls – or on the publishing of those results. Still, there are certain limitations found in this study that can be troubling for polling freedom in some places. In at least one in ten countries, there are limits in asking about political topics, including elections and evaluations of governments and parties. Twelve percent of countries set limits on asking about religion; twice that percentage forbid questions about religion in Sub-Saharan Africa (20%) and West Asia & North Africa (26%). Publication of results on these topics is forbidden in an even larger percentage of countries.

PROSECUTIONS OF POLLSTERS AND THOSE WHO REPORT POLLS

Perhaps the most severe government response to polling is prosecution of those who conduct or report polls. While these prosecutions are few in number, they may be the most serious threats to polling freedom. In 18 countries (12%), there have been prosecutions of those conducting opinion polls (including the occasional arrests of interviewers). In 15 countries (10%), there have been prosecutions of those reporting opinion polls.

Prosecutions have taken place in every region except North America & the Caribbean. They appear to be most common in West Asia & North Africa. One in five countries in that region report that prosecutions have taken place, both for conducting and for reporting polls.



WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

Table 3: Blackout periods prior to elections since 1996

Sub-Saharan Africa (n=35)					
	1996	2002	2012	2017	2022
Angola	-	-	-	ns	NP
Benin	-	-	-	-	ns
Botswana	-	-	-	0	unknown
Burkina Faso	-	-	-	-	15
Burundi	-	-	-	-	ns
Cameroon	-	-	-	90	unknown
Cape Verde	-	-	-	-	7
Cote d'Ivoire	-	-	-	2	0
DR Congo	-	-	-	3*	0
Eswatini	-	-	-	-	0
Ethiopia	-	-	-	-	unknown
Gabon	-	-	-	-	0
Gambia	-	-	-	-	unknown
Ghana	-	-	-	ns	0
Guinea	-	-	-	0	0
Guinea-Bissau	-	-	-	-	unknown
Kenya	-	-	0	5	5
Lesotho	-	-	-	0	0

unknown = blackout status unknown (2017 & 2022)

* = value imputed from www.aceproject.org

- = did not participate in survey year(s)

ns = length of blackout period not specified (2017 & 2022)

NP = report no election polls (2017 & 2022)

WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

Sub-Saharan Africa (n=35)					
	1996	2002	2012	2017	2022
Liberia	-	-	-	-	0
Madagascar	-	-	-	-	90
Malawi	-	-	-	-	0
Mali	-	-	-	-	0
Mauritania	-	-	-	-	NP
Mauritius	-	-	-	ns	-
Mozambique	-	-	-	-	NP
Namibia	-	-	-	0	-
Niger	-	-	-	-	NP
Nigeria	-	-	0	0	0
Senegal	-	-	-	0	0
Sierra Leone	-	-	-	0	NP
Somalia	-	-	-	0	0
South Africa	42	0	0	0	0
Tanzania	-	-	-	0	ns
Togo	-	-	-	0	0
Uganda	-	-	-	0	2
Zambia	-	-	-	14	0
Zimbabwe	-	-	-	0	0

unknown = blackout status unknown (2017 & 2022)

* = value imputed from www.aceproject.org

- = did not participate in survey year(s)

ns = length of blackout period not specified (2017 & 2022)

NP = report no election polls (2017 & 2022)

WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

West Asia & North Africa (n=21)

	1996	2002	2012	2017	2022
Algeria	-	-	-	-	NP
Bahrain	-	-	-	-	1
Egypt	-	-	0	3	NP
Iran	-	-	-	0	1
Iraq	-	-	-	2	0
Israel	0	1	0	5	3
Jordan	-	-	-	0	1
Kuwait	-	-	3	0	1
Lebanon	-	-	-	10*	10
Libya	-	-	-	0	0
Morocco	-	-	-	NP	10*
Pakistan	0	0	0	1	0
Palestine	-	-	0	1	0
Qatar	-	-	-	NP	NP

unknown = blackout status unknown (2017 & 2022)

* = value imputed from www.aceproject.org

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WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

West Asia & North Africa (n=21)

	1996	2002	2012	2017	2022
Saudi Arabia	-	-	-	NP	NP
Sudan	-	-	-	NP	NP
Syria	-	-	-	-	NP
Tunisia	-	-	-	150	30
Turkey	30	7	7	1	10
UAE	0	0	0	ns	NP
Yemen	-	-	-	0	NP

Asia Pacific Oceania (n=30)

	1996	2002	2012	2017	2022
Afghanistan	-	-	-	0	NP
Australia	0	0	0	0	0
Bangladesh	-	0	0	0	0
Bhutan	-	-	2	-	-
Cambodia	-	-	0	-	unknown
China	-	-	0	NP	NP
Fiji	-	-	0	7	7
Hong Kong	-	-	0	0	NP

unknown = blackout status unknown (2017 & 2022)

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WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

Asia Pacific Oceania (n=30)

	1996	2002	2012	2017	2022
India	0	0	0	2	0
Indonesia	21	0	0	7	3
Japan	0	0	0	0	0
Kazakhstan	1	0	0	5*	0
Kyrgyzstan	-	-	-	5*	30
Macau	-	-	15	-	-
Malaysia	0	0	0	0	0
Maldives	-	-	0	-	0
Mongolia	-	-	-	7	0
Myanmar	-	-	3	ns	NP
Nepal	-	1	0	0	3
New Zealand	1	0	0	0	0
Papua New Guinea	-	-	-	-	NP
Philippines	0	0	0	0	0
Singapore	-	-	1	14	NP
South Korea	0	23	21	7	6
Sri Lanka	-	-	7	0	5
Taiwan	0	0	10	10	10

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WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

Asia Pacific Oceania (n=30)

	1996	2002	2012	2017	2022
Tajikistan	-	-	-	NP	0
Thailand	0	0	0	ns	7
Timor-Leste	-	-	-	-	0
Turkmenistan	-	-	-	-	NP
Uzbekistan	-	-	-	-	unknown
Vietnam	-	-	-	NP	NP

Europe (n=45)

	1996	2002	2012	2017	2022
Albania	-	-	-	-	1
Andorra	-	-	-	1	7
Armenia	-	-	-	1*	unknown
Austria	0	0	0	0	0
Azerbaijan	-	-	0	1*	NP
Belarus	-	-	-	5*	5
Belgium	0	0	0	0	7
Bosnia	-	0	1	2	NP
Bulgaria	1	7	0	1	1

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WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

Europe (n=45)					
	1996	2002	2012	2017	2022
Croatia	1	1	1	1	2
Cyprus	0	7	7	7	7
Czechia	-	7	3	3	3
Denmark	0	0	0	0	0
Estonia	0	0	0	0	0
Finland	0	0	0	0	0
France	6	1	1	1	1
Georgia	-	0	-	2*	2
Germany	0	0	0	0	1
Greece	0	15	15	1	15
Hungary	-	-	-	2	0
Iceland	0	0	0	unknown	0
Ireland	0	0	-	0	0
Italy	28	15	15	14	15
Kosovo	-	-	-	1	1
Latvia	0	0	0	1	0
Lithuania	-	-	0	0	1
Luxembourg	30	30	-	7	5

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WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

Europe (n=45)					
	1996	2002	2012	2017	2022
Malta	-	-	-	1	0
Moldova	-	-	-	7	5
Montenegro	-	-	-	15	15
Netherlands	0	0	0	0	0
North Macedonia	0	5	5	1	5
Norway	0	0	1	1	0
Poland	12	1	1	1	2
Portugal	7	1	1	1*	1
Romania	-	2	7	2*	2
Russia	2	0	5	6	5
Serbia	-	-	2	1	3
Slovakia	-	14	0	14	15
Slovenia	1	7	0	1	1
Spain	5	5	5	5	6
Sweden	0	0	0	0	0
Switzerland	7	10	0	unknown	10
Ukraine	0	0	15	1	2
United Kingdom	0	0	0	0	0

unknown = blackout status unknown (2017 & 2022)

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WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

Latin America (n=19)					
	1996	2002	2012	2017	2022
Argentina	0	1	15	2	2
Bolivia	2	2	-	30	9
Brazil	0	0	2	7	0
Chile	-	-	-	15	15
Colombia	7	1	7	7	7
Ecuador	-	-	15	8	10
El Salvador	-	-	1	15	7
Guatemala	-	-	-	15*	0
Guyana	-	-	-	7	unknown
Honduras	-	0	45	30	30
Mexico	7	7	3	4	3
Nicaragua	0	0	-	3	7
Panama	-	1	-	20	3
Paraguay	-	-	-	15	15
Peru	15	7	7	7	7
Suriname	-	-	-	unknown	0
Uruguay	15	7	2	4	2
Venezuela	15	2	7	7	3

unknown = blackout status unknown (2017 & 2022)

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WHERE CAN POLLS BE FREELY CONDUCTED AND REPORTED?

North America & the Caribbean (n=7)

	1996	2002	2012	2017	2022
Bahamas	-	-	-	0	-
Barbados	-	-	-	0	0
Canada	3	2	3	1	0
Dominican Republic	-	-	0	0	8
Haiti	-	-	-	-	0
Jamaica	-	-	-	0	1
Puerto Rico	0	0	-	-	-
Trinidad & Tobago	-	-	0	1	0
USA	0	0	0	0	0

unknown = blackout status unknown (2017 & 2022)

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03

OPINION POLLSTERS AND THE MEDIA – RATING QUALITY ACROSS THE BOARD

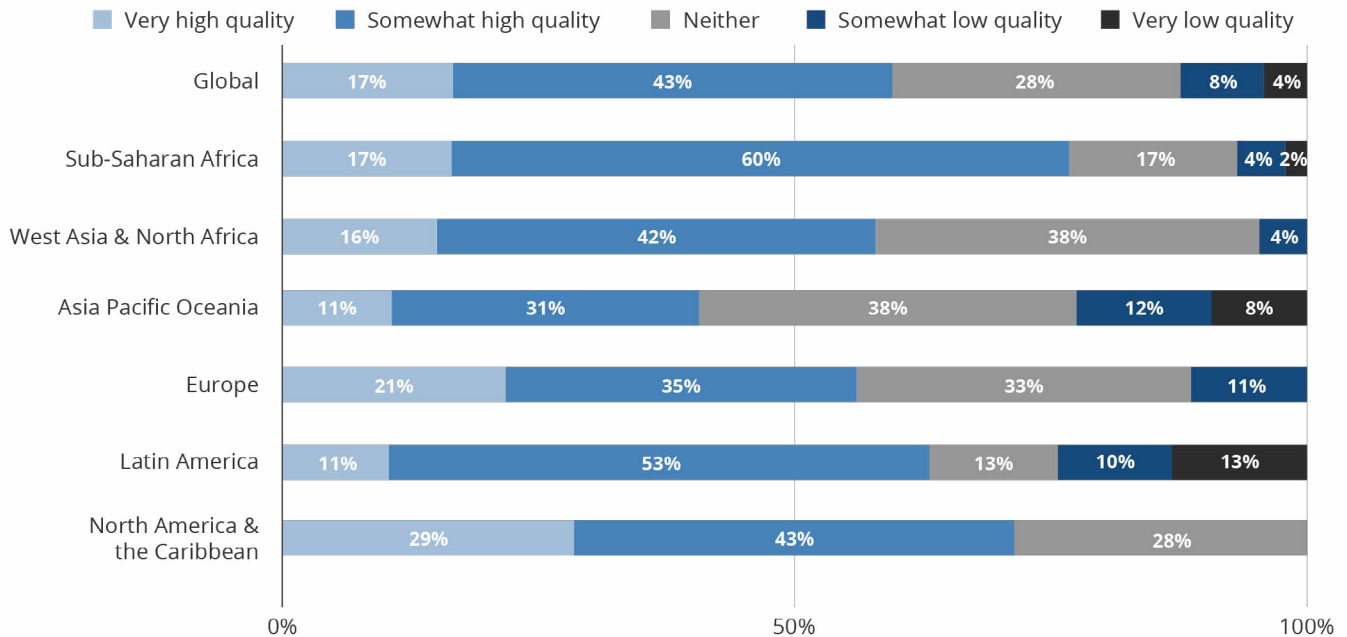
OPINION POLLSTERS AND THE MEDIA - RATING QUALITY ACROSS THE BOARD

What is the general methodological quality of public opinion polls that are published today, and what is the general quality of the news reports about those polls? In most countries, experts today have more positive than negative feelings about the methodological quality of published polls. Across the 157 countries surveyed in 2022, 60% give high quality ratings to published polls' methodology, but relatively few (17%) say they are of "very high quality." Twelve percent categorize the methodological quality of polls in their country as of low quality.

Asia Pacific Oceania is the only region where experts in fewer than half the countries say poll quality is not even "somewhat high." The most positive reports are in Sub-Saharan Africa (77% "very" or "somewhat high") and North America & the Caribbean (72%). The most negative are in Asia Pacific Oceania and Latin America, where more than one in five countries in each region are rated as having polls of "very" or "somewhat low" methodological quality. Globally, there was a drop of seven points in the share of countries reported to have methodologically high-quality polls; the share of countries where published polls were deemed to be of low quality did not change.



Figure 6: “Rate the methodological quality of the public opinion polls published in your country.”



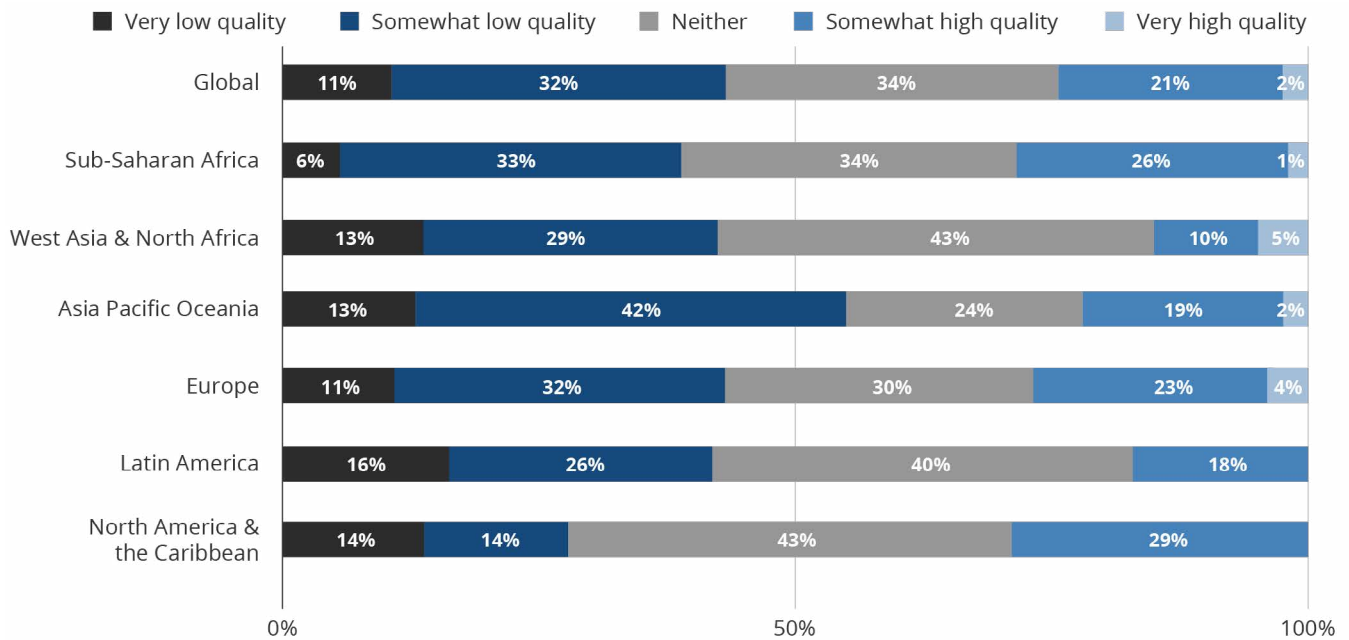
What may be the larger problem with published polls is not their methodological quality, but the quality of the reporting about them. In nearly half of the countries surveyed, the reporting of polls is viewed negatively, as of either “somewhat low quality” (32%) or of “very low quality” (11%).

These results are not much different from what was found five years ago, though the share of countries with low quality reporting did drop five points, from 48% in 2017, while the percentage describing reporting as high quality rose only one point, from 23%.

In the current study, perceptions of poor reporting of polls are highest in Asia Pacific Oceania (55%). It is the only region where a majority of countries describe poor journalistic reporting of poll results. The best ratings of reporting quality are in North America & the Caribbean (in 29% of countries in this region, experts rate journalistic poll reports as “very” or “somewhat high”), in Europe (27%), and in Sub-Saharan Africa (27%). Although poll reporting is judged best in North America & the Caribbean, there appears to be a sizable decline there in the perception of reporting quality: in 2017, 57% of countries in that region were said to have at least somewhat high quality poll reporting.

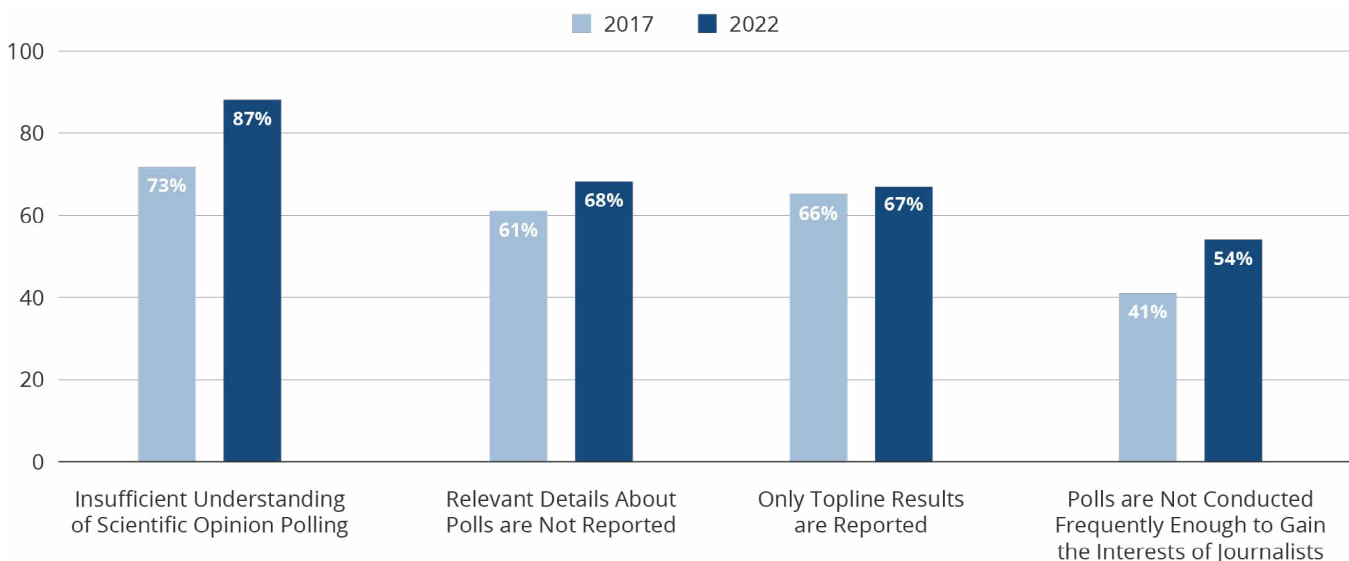
OPINION POLLSTERS AND THE MEDIA – RATING QUALITY ACROSS THE BOARD

Figure 7: “Rate the quality of journalistic reporting of public opinion poll findings in your country mass media.”



Why is poll reporting of low quality? Among those who rated journalistic reporting of opinion polls as of “somewhat” or “very low quality,” the reasons are shown below:

Figure 8: Key Reasons for Low Quality of Journalistic Reporting of Opinion Polls. [Reporting “Somewhat” or a “Great Deal”; Reasons are ranked based on responses to the 2022 survey]



The reasons given in this study are much like the reasons from 2017. Concerns about insufficient understanding of scientific opinion polling among journalists in the mass media are and were common across all regions except for North America & the Caribbean. The percent of countries today where experts believe journalists' lack of understanding of polls has "somewhat" or "a great deal" of impact on poor reporting ranges from highs of 97% in Asia Pacific Oceania, 94% in Latin America, 90% in Sub-Saharan Africa, and 82-85% in Europe and West Asia & North Africa, but drops to 0% in North America & the Caribbean. This perceived lack of an understanding of scientific polling suggests a need for both ESOMAR and WAPOR to expand their international programs, both globally and through regional chapters.

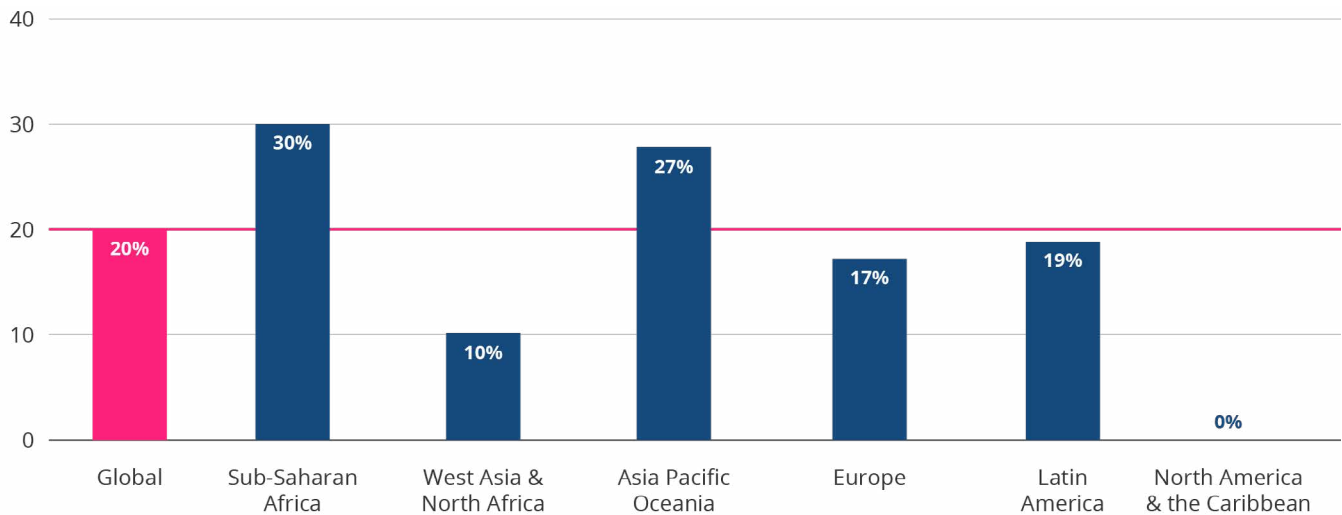
The study also points to the lack of transparency about availability of the methodological details provided for published polls. WAPOR and ESOMAR should continue to encourage pollsters to make that information readily available in a timely manner when data are published.

Globally, experts in only 24% of countries report that methodology on published polls is easily available (on pollsters' websites, for example). Easy access to this information is greatest in Europe and North America & the Caribbean (at 29-31%), but this is still a very low level.

A further 11% say that methodological information is available upon request, but that the process is not easy. Pollsters operating in North America & the Caribbean are most likely to offer this response (28%), whereas pollsters operating in Europe (3%) and Latin America (5%) are least likely to report this level of access. The most common response to this question is that access to methodological information regarding published polls varies by polling firm (42% globally, with a high of 53% in West Asia & North Africa, followed closely by Latin America (50%) and Europe (46%).

Of greatest concern is the report that in 20% of countries, methodological reporting on published opinion polls is generally not available.

Figure 9: Percent Reporting that Methodological Information is “Usually Not Available”



There has been relatively little change since 2017 in these reports. Polling datasets are not often available for analysis or archived in a publicly accessible data center.³ Globally, 63% report that, to their knowledge, polling datasets are not publicly accessible, up slightly from the 57% who reported this in 2017. Eighteen percent report that data are available, but that access is difficult.

Only 9% of countries overall have what ESOMAR and WAPOR would consider the ideal situation: data are available, and access is easy. Easy access to data is reported most often in Europe and North America & the Caribbean (though still at low levels

of 15% and 14%, respectively), followed by Sub-Saharan Africa (10%), Latin America (7%), West Asia & North Africa (2%), and Asia Pacific Oceania (2%). Inaccessibility to survey data peaks at 80% in Latin America, compared to the global rate of 63%.

These findings indicate the need to increase efforts to inform journalists and other consumers of opinion polls about professional standards for reporting and access to the data that underlie published findings. ESOMAR and WAPOR have publications which address these issues and they can be found on the organizations’ websites: www.esomar.org and www.wapor.org.⁴

³ This question did not specifically repeat text about “published opinion polls” but it was in that section of the questionnaire and it was our intention that the respondent would understand this as referring to published polls. Neither ESOMAR’s nor WAPOR’s Codes of Ethics and Professional Conduct require that sponsors, practitioners or end-users release the data from private surveys, that is those which are not released to the public.

⁴ ESOMAR/WAPOR Guideline on Opinion Polls and Published Surveys (August 2014.)

04

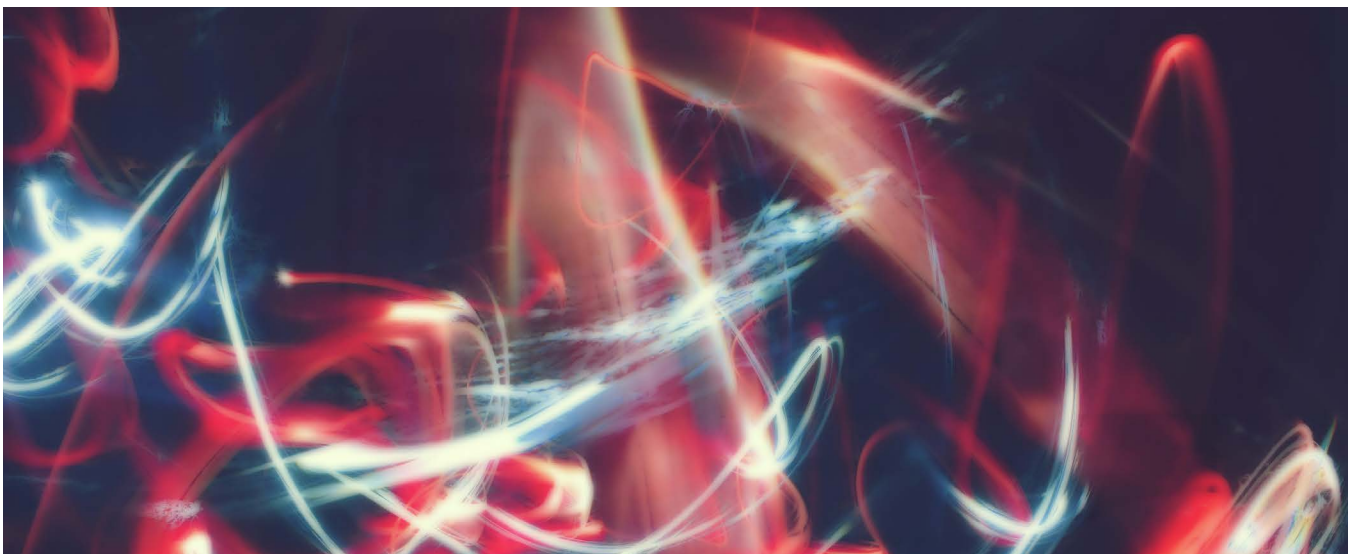
RESEARCH MODES AND RESEARCH DIFFICULTIES

RESEARCH MODES AND RESEARCH DIFFICULTIES

PUBLIC OPINION RESEARCH MODES

Modes of public opinion research is a dynamic field. The development of communication and information technologies, increase of internet and mobile connection penetration, and growth in the costs of face-to-face interviewing have long stimulated the exploitation of telephone and (increasingly) online modes of public opinion research. Since 2020, this shift was substantially accelerated by the Covid-19 pandemic experience and the associated restrictions imposed on in-person interactions. As a result, by 2022, online surveys became the second most widely used data collection mode on a global scale (77%), after in-person interviews (91%), and interviews with mobile phones dropped to third place according to our survey (68%).

Compared to 2017, the share of researchers reporting use of online and web-administered surveys has grown by 80% in Latin America, 40% in Sub-Saharan Africa, and 30% in Asia Pacific Oceania, Europe, and West Asia & North Africa. Likewise, the use of telephone interviewing with landlines, mobile phones, or both has multiplied in Latin America and doubled in Asia Pacific Oceania, West Asia & North Africa, and Europe. To a lesser extent, the share of online and telephone interviewing has grown in Europe and North America & the Caribbean, regions that had already widely employed these modes in 2017 (Table 4).



RESEARCH MODES AND RESEARCH DIFFICULTIES

Table 4: “Which of the following modes of administration are used to conduct public opinion polls in your country?”* n=157

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
In person/face-to-face	91%	96%	98%	96%	77%	100%	100%
Online/web	77%	57%	87%	77%	92%	74%	71%
Telephone with mobile phones only	68%	61%	79%	81%	61%	79%	29%
Telephone with landline and mobile phones	64%	27%	60%	75%	88%	63%	57%
Telephone with landline phones only	42%	26%	74%	36%	42%	47%	43%
Interactive Voice Response (IVR)	20%	21%	11%	21%	23%	21%	29%
Mail/Postal	13%	7%	6%	19%	18%	0%	43%

* Note: Percentages are based on the number of countries in each region which are using each mode of research.

In support of the growing methodological diversity in public opinion research, a sizable share of countries across all regions reports the use of Interactive Voice Response (IVR) (20% on average, 29% in North America & the Caribbean), with postal surveys traditionally common in North America & the Caribbean (43%), Asia Pacific

Oceania (19%), and Europe (18%). Moreover, short surveys via social media platforms were mentioned among other modes being currently in use. This marks a substantive increase as compared to 2017, when only about 10% indicated use of methods other than in-person, online, or telephone interviewing.

**DOMINANT MODE OF PUBLIC
OPINION RESEARCH**

Substantive regional differences exist in the dominant mode of public opinion research. While the choice of method can be project-specific, and perceptions of the dominant method are subject to the individual professional experience of experts, the overall pattern observed through the data confirms our expectations. In-person interviews remain the dominant data collection mode in developing countries, societies with a greater share of rural population, and nations in Latin America, Asia Pacific Oceania, Sub-Saharan Africa, and post-Soviet Europe. With a few exceptions, online and web-surveys became the main survey mode in many OECD countries, including Australia, New Zealand, the USA, and Western and Central Europe, where internet penetration exceeds 90%.⁵ Telephone interviews seem to be prevailing in countries featuring large territory and dispersed population settlement patterns, sometimes in combination with unequal internet penetration (Argentina, Brazil, Canada, China, Finland, Norway, Russia, and Sweden, among others). Mobile-only surveys are common in Sub-Saharan African, West Asia & North Africa, and India (Figure 10).

Looking at the changes that occurred in the dominant survey mode between 2017 and

2022, the main trends show a growing share of online surveys on the one hand, and the gradual replacement of landline phones with mobile phones in telephone interviewing on the other. Over the past five years, the share of countries with online surveys as the dominant mode increased from 10% to 14%. Advancement of online surveys occurs unequally throughout the world: the greatest is the increase of web-surveys in Europe (from 22% of countries identifying it as the dominant mode in 2017 to 30% in 2022) and West Asia & North Africa (from 8% in 2017 to 17% in 2022); in North America & the Caribbean, a stable 14% continue identifying online surveys as the dominant mode, while in other world regions, the increase comprises about 2-3%. These regional patterns are caused not only by the basic cross-country discrepancies in internet penetration levels, but also reflect other advantages and disadvantages of the method. First, technological progress does not always come at an affordable price. While in many European countries low internet costs made online surveys a reasonably priced alternative to expensive in-person interviewing, significantly higher costs of internet connection in a number of countries in Sub-Saharan Africa and Asia Pacific Oceania make participation in online surveys

⁵ Individuals using the internet (% of population): <https://data.worldbank.org/indicator/IT.NET.USER.ZS>

RESEARCH MODES AND RESEARCH DIFFICULTIES

too expensive for respondents. This results in low response rates, sample bias, and overall low feasibility of the method. Another challenge that restrains the spread of online surveys is the population's literacy rate (67% in Sub-Saharan Africa, according to the World Bank⁶). However, online surveys are more difficult for governments to control and censorship bodies to track, which makes them an attractive option in repressive regimes, avoiding harassment and censorship and increasing the safety of both pollsters and respondents. Interestingly, online surveys in some countries (for example, in Austria) are not accepted as a valid measure of political attitudes and voting intentions unless they are complemented by a second method.

From 2017 to 2022, the use of telephone surveys with landline as the dominant mode declined from 13% to 2%, and surveys combining landline and mobile phones declined from 29% to 20%. The biggest declines of landline telephone interviewing occurred in Sub-Saharan Africa (from 33% saying this is the dominant mode in 2017 to 0% in 2022) and in North America & the Caribbean (from 15% to 0%). To a lesser extent, but in the same vein, landline interviewing declined in Europe

(from 8% to 3%) and in Asia Pacific Oceania and West Asia & North Africa (from 11% to 2%). Landline interviewing is being gradually replaced by mobile phone surveys; its share as the dominant data collection mode in 2017 and 2022 increased from 4% to 12% worldwide, following the growth in the number of countries that have over 100 mobile cellular subscriptions per 100 citizens.⁷ The greatest increase occurred in Sub-Saharan Africa (from 6% to 23% reporting this as the dominant mode) and in West Asia & North Africa (8% to 21%) and Sub-Saharan Africa (7% to 23%). Increased use of the internet and mobile phones has also resulted in a decline of face-to-face interviews: in Europe, in-person surveys as the primary data collection mode went down from 27% to 19%; in Latin America, they decreased from 64% to 53%. Among the main limitations of telephone interviews reported by experts are the issues of trust-building between the interviewer and the respondent, which is an important pre-condition of sincere responses. However, telephone interviews become a viable alternative in conflict areas and countries at war (for example, currently in Ukraine), where monitoring public opinion is essential, but in-person interviewing is too risky for the life and safety of both interviewers and respondents.

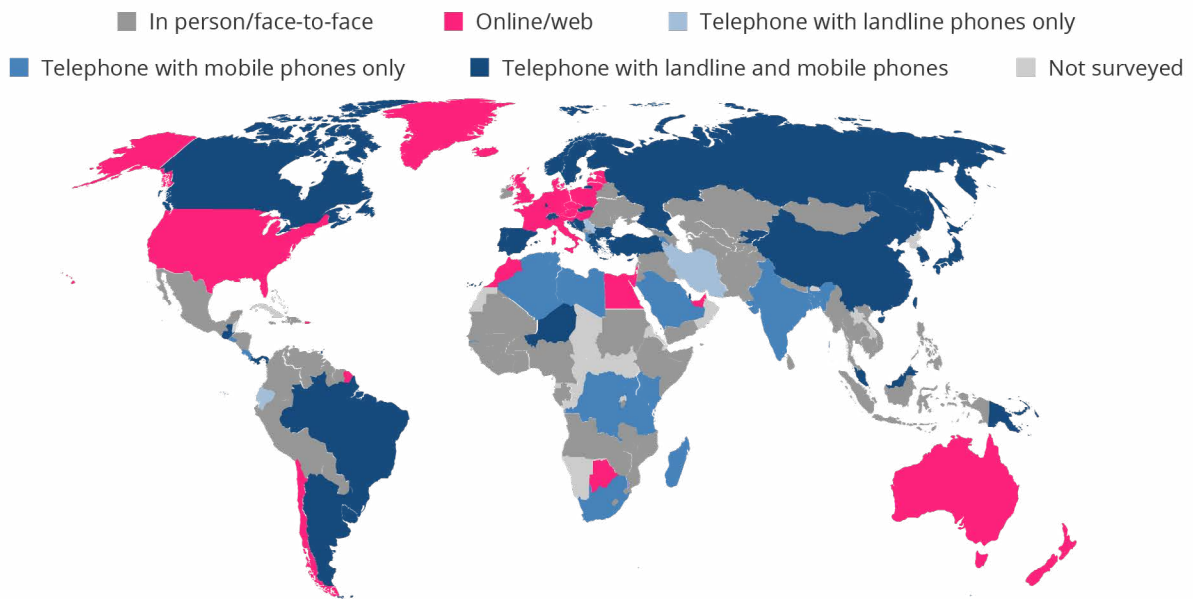
⁶ Literacy rate, adult total (% of people ages 15 and above): <https://data.worldbank.org/indicator/SE.ADT.LITR.ZS>

⁷ Mobile cellular subscriptions (per 100 people): <https://data.worldbank.org/indicator/IT.CEL.SETS.P2>

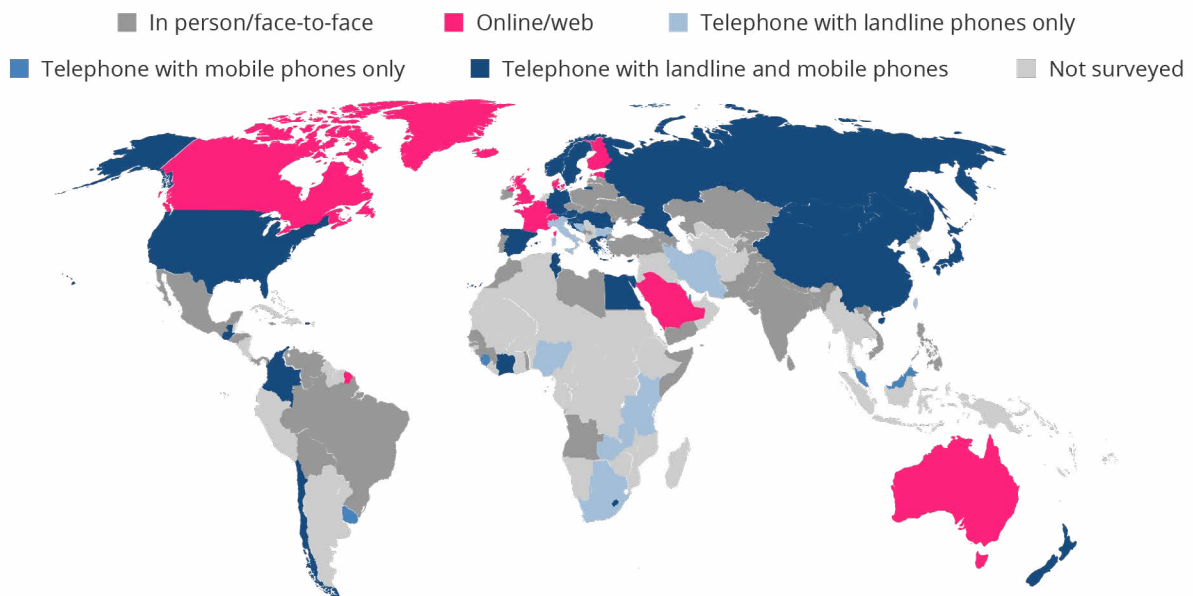
RESEARCH MODES AND RESEARCH DIFFICULTIES

Figure 10: Dominant mode of public opinion research: 2022 vs 2017

2022: "Which mode would you say is the dominant mode, the one that is used most for the public opinion?" (n=157)



2017: "Which mode would you say is the dominant mode, the one that is used most for the public opinion?" (n=104)

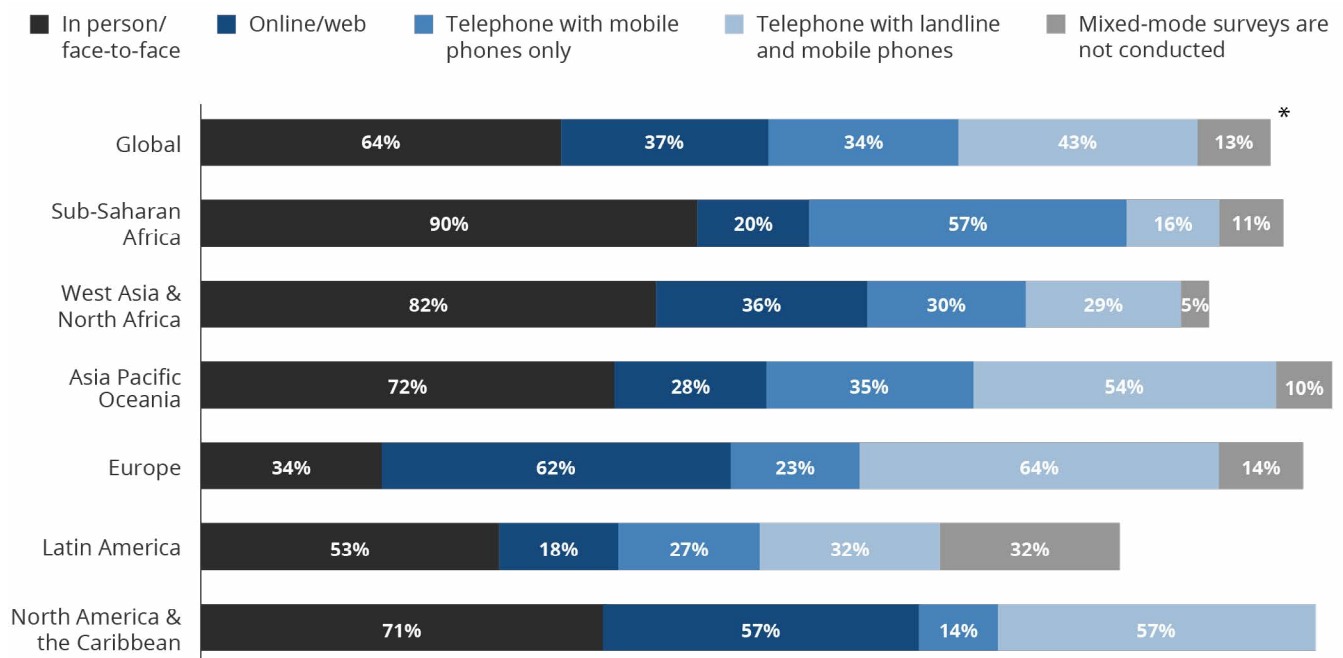


MIXED-MODE SURVEYS

Amid the changes in the available methodological toolkit of public opinion researchers, mixed-mode surveys have become increasingly widespread. They allow public opinion researchers to maximize the efficiency of the available financial, time, and human resources, and to overcome the shortcomings and limitations of each single data collection mode on its own. With the exception of Latin America (68%), in all other regions, eight to nine experts (84-95%) report the use of mixed-mode surveys (Figure 11). Experts stress that mixed-mode studies have not yet replaced single-mode surveys (admitting that nothing beats a well-designed, nationwide, random probability, face-to-face survey), but their share in polling is

constantly growing. Yet, there are certain regional differences in the most common methods of mode combination. With the exception of Europe, face-to-face interviews serve as the basic survey mode, supplemented by mobile phone interviews in Sub-Saharan Africa, online or telephone interviews in West Asia & North Africa, telephone interviews with landline and mobile phones in Asia Pacific Oceania, and online and telephone interviews in North America & the Caribbean. Mixed-mode surveys on the European continent primarily represent a combination of online and telephone interviewing, with in-person interviews comprising only a minor component.

Figure 11: “If there are mixed-mode public opinion surveys conducted in your country, what is the most widespread combination of data collection modes?”



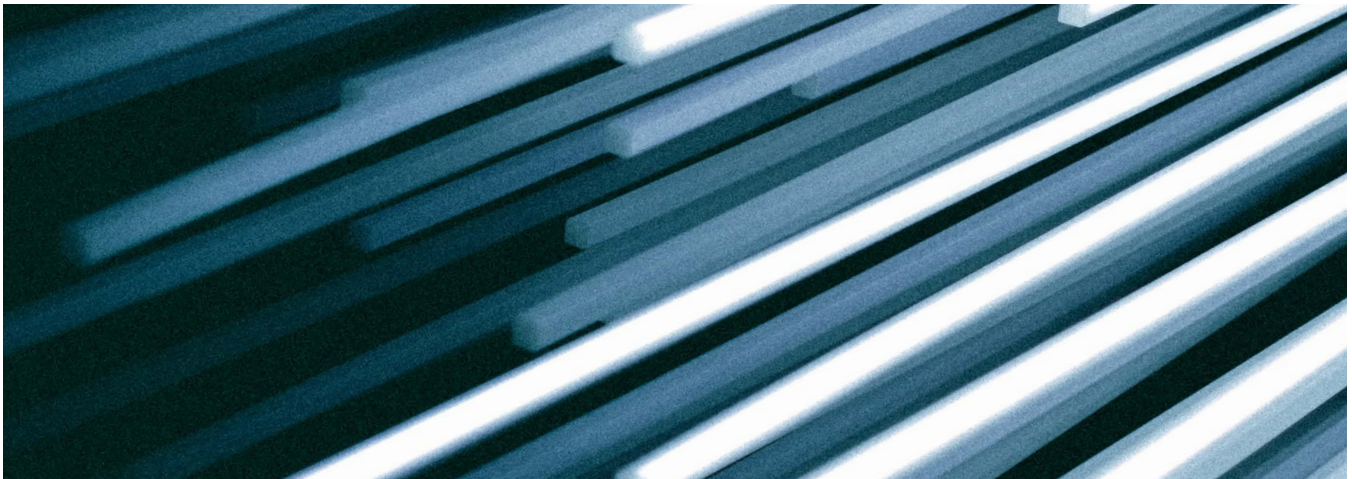
* Note: The percentages are based on the four modes most often used globally.

SAFETY OF INTERVIEWERS

Despite the ongoing changes in the field of public opinion research methods, interviewer-administered face-to-face interviewing remains one of the most commonly used survey modes in the majority of the world's regions. Alongside numerous advantages, challenges associated with conducting face-to-face interviews include concerns over the security and safety of interviewers. While the outbreak of the Covid-19 pandemic exacerbated the issues of interviewer and respondent health and protection from virus transmission, the threats of becoming a victim of street violence, harassment, or crime have increased in many parts of the world.

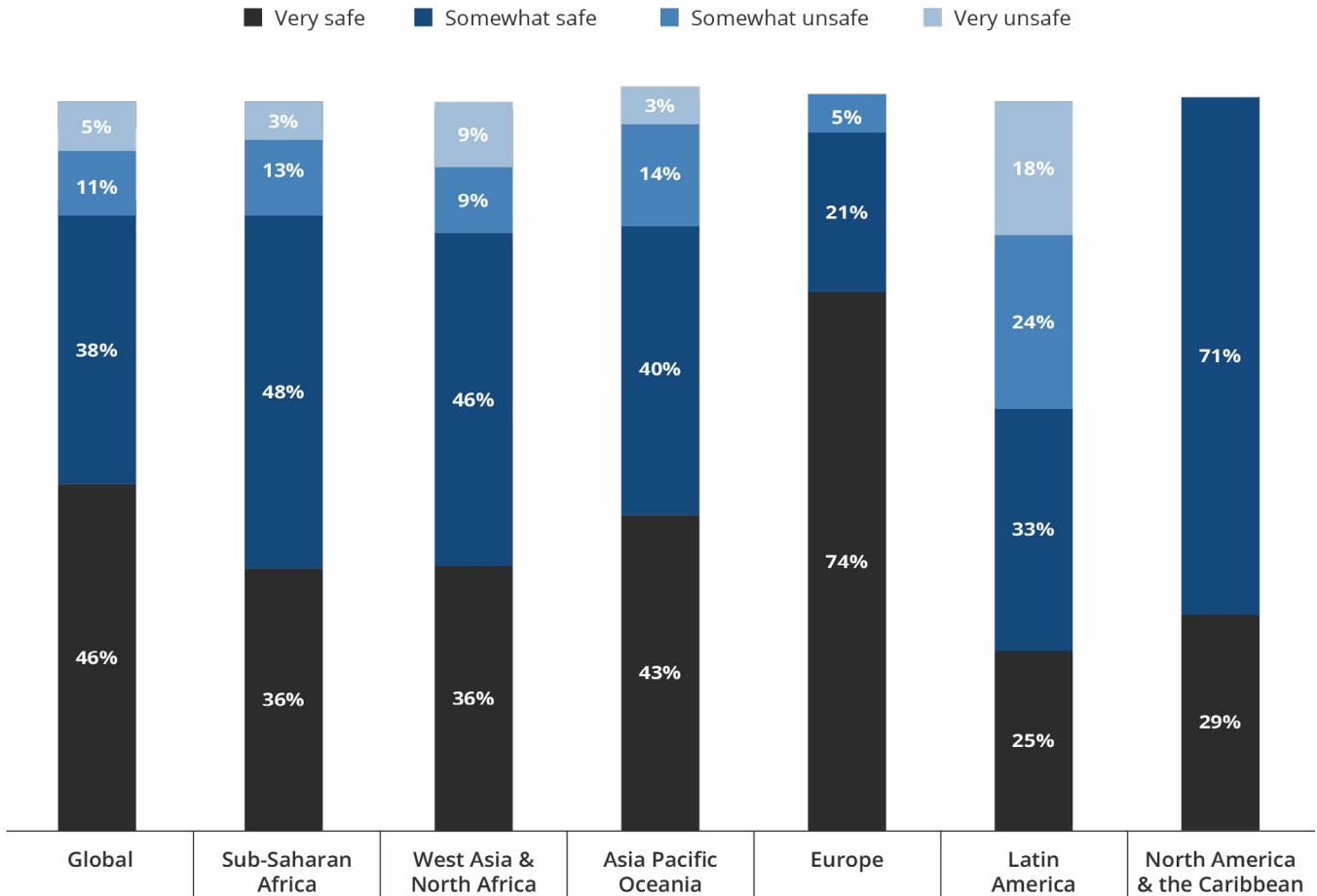
Perceptions of interviewers' safety vary widely around the world. It is safer for interviewers in North America & the Caribbean and Europe, where in over 95% of countries experts identify the conditions as "very safe" or "somewhat safe".

The level of danger increases in Sub-Saharan Africa, West Asia & North Africa, and Asia Pacific Oceania, with 16% to 18% of countries being identified as "somewhat unsafe" or "very unsafe" for interviewers. Finally, the worst interviewing conditions are in Latin America, where 42% of countries are rated as "unsafe" for interviewers when conducting in-person interviews. Countries where the situation for interviewers is "very unsafe" include Afghanistan, Guatemala, Honduras, Iraq, Myanmar, Somalia, Venezuela, and Yemen (the survey for Ukraine took place before the outbreak of the war in February 2022). Countries where the situation is only "somewhat unsafe" are Argentina, Azerbaijan, Belarus, Bulgaria, Burkina Faso, Costa Rica, Ecuador, Egypt, Liberia, Malawi, Malaysia, Mali, Mexico, Morocco, Mozambique, Nigeria, Papua New Guinea, Peru, Senegal, Syria, and Tajikistan.



RESEARCH MODES AND RESEARCH DIFFICULTIES

Figure 12: “How would you rate the safety of in-person interviewers in your country when they are out conducting F2F interviews?”



CHALLENGES AND IMPROVEMENTS IN PUBLIC OPINION RESEARCH

Over the past five years, did it become more or less difficult to conduct surveys? On a global scale, things in the polling industry are becoming more complicated: in only 21% of countries, experts report that it has become easier to conduct surveys;

in about a third (35%), experts say that nothing has changed substantially over the last five years; in close to half (44%) of countries, experts indicate that it is now “somewhat” or “much more difficult” to do opinion research.

RESEARCH MODES AND RESEARCH DIFFICULTIES

Table 5: “In general, would you say it is more or less difficult now to conduct public opinion polls in your country, compared to five years ago? Or would you say that nothing has changed substantially?” n=157

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Much more difficult	15%	13%	10%	25%	11%	13%	29%
Somewhat more difficult	29%	17%	18%	22%	47%	38%	14%
Nothing has changed substantially	34%	27%	42%	38%	34%	37%	29%
Somewhat less difficult	15%	30%	16%	12%	6%	7%	29%
Much less difficult	6%	13%	14%	3%	1%	5%	0%

The share of those reporting that nothing has changed is close to a third across all regions (varying from 27% in Sub-Saharan Africa to 42% in West Asia & North Africa). Shares of countries reporting positive or negative changes differ across the regions. It is worth noting that regional patterns remain relatively stable as compared to the 2017 Freedom Survey: they are basically the same as five years ago. Europe and Asia Pacific Oceania experience the most challenges, while Sub-Saharan Africa and North America & the Caribbean experience the fewest. Sub-Saharan Africa also remains the only region with a positive “balance:” the share of those who note less difficulty today is greater than those who report more difficulty. But across all other regions, a greater number of countries report an increase of difficulties in public opinion research as compared to 2017, making it a global trend.

Countries where experts say that it became much less difficult to conduct research compared to five years ago are Bahrain, Ecuador, Guinea, Palestine, Qatar, and Zimbabwe. On the other hand, countries where experts note that it became much more difficult to conduct research now are Afghanistan, Armenia, Chile, Croatia, Egypt, Fiji, Hungary, Myanmar, Mongolia, Nigeria, Singapore, Tajikistan, Trinidad and Tobago, United Kingdom, Tanzania, United States of America, and Venezuela.

Which conditions make the work of public opinion researchers more difficult, and which factors make it easier to work in the field? When discussing particular challenges that make public opinion research more difficult than five years ago, the most common reasons are the increased

RESEARCH MODES AND RESEARCH DIFFICULTIES

costs of data collection and budget cuts (60% each), the implications of the corona pandemic (50%) and declining response rates (45%). At the same time, such changes as the increase in the number of single person households (7%), local crises (21%), and new government regulations (22%) have contributed the least (Figure 13). In addition to the provided list of reasons, other factors have been mentioned by experts, including the overall difficulty in accessing respondents, in particular those from younger age groups; growing state censorship and control over public opinion research and publication of results; and the lack of capacity to benefit from the use of new data collection methods and the use of mixed-mode surveys.

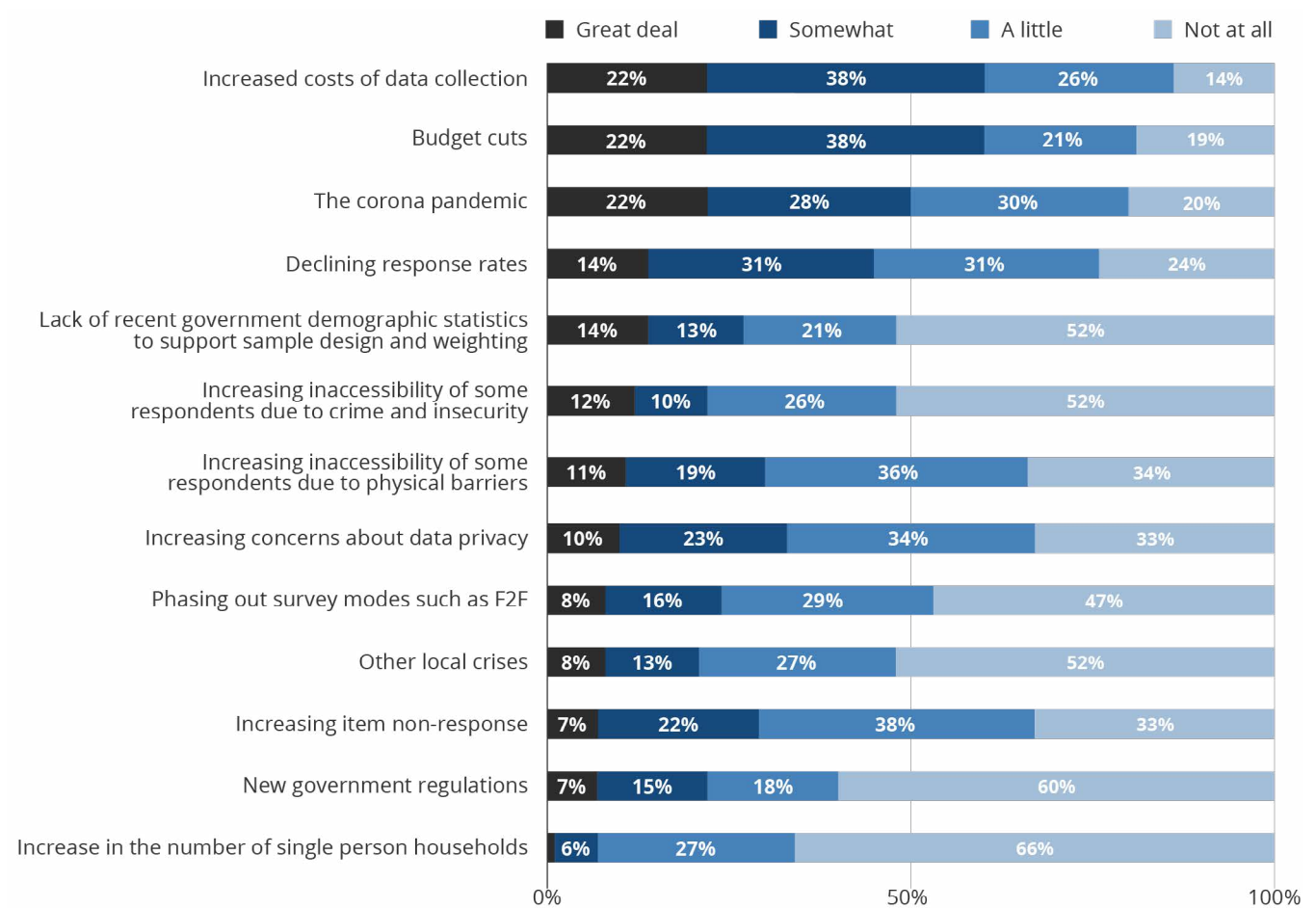
The hierarchy of factors that negatively affect public opinion research has minimally changed as compared to 2017 (some factors became more or less relevant by only three to five percentage points, on average). However, much variation exists across the regions. For instance, in North America & the Caribbean and West Asia & North Africa, only about 40% of countries have been affected by budget cuts, but in Latin America and Sub-Saharan Africa, this indicator comprises 74% of countries.

At the same time, concerns over the growing costs of data collection have been relevant to 71% in North America & the Caribbean,

76% in Sub-Saharan Africa, and 75% in Latin America. Regions where the corona pandemic has had the greatest negative effect on public opinion research are Latin America (61%), Asia Pacific Oceania (59%), and North America & the Caribbean (57%). Lack of demographic and statistical data has especially been an issue for countries in Sub-Saharan Africa (39%), Latin America (39%), and West Asia & North Africa (31%). In these same regions, local crises have also often been disruptive of public opinion research. Changes in existing governmental regulations frequently cause negative consequences for public opinion research in Sub-Saharan Africa (43%). Crime and security mostly create difficulties for researchers in Latin America (54%), and declining response rates affect Latin America (68%), Europe (54%), and Asia Pacific Oceania (51%). If all listed factors are put together into a cumulative index, some of the countries experiencing the least number of difficulties, according to experts, include Australia, Canada, Denmark, Ireland, Iceland, Israel, Qatar, and Saudi Arabia. Countries where the greatest number of difficulties were mentioned include Botswana, Bolivia, Chile, Democratic Republic of the Congo, Hungary, Nigeria, and Yemen.

RESEARCH MODES AND RESEARCH DIFFICULTIES

Figure 13: “Regardless of general conditions, how much does each of the following contribute to making it more difficult to conduct public opinion polls in your country, compared to five years ago?”

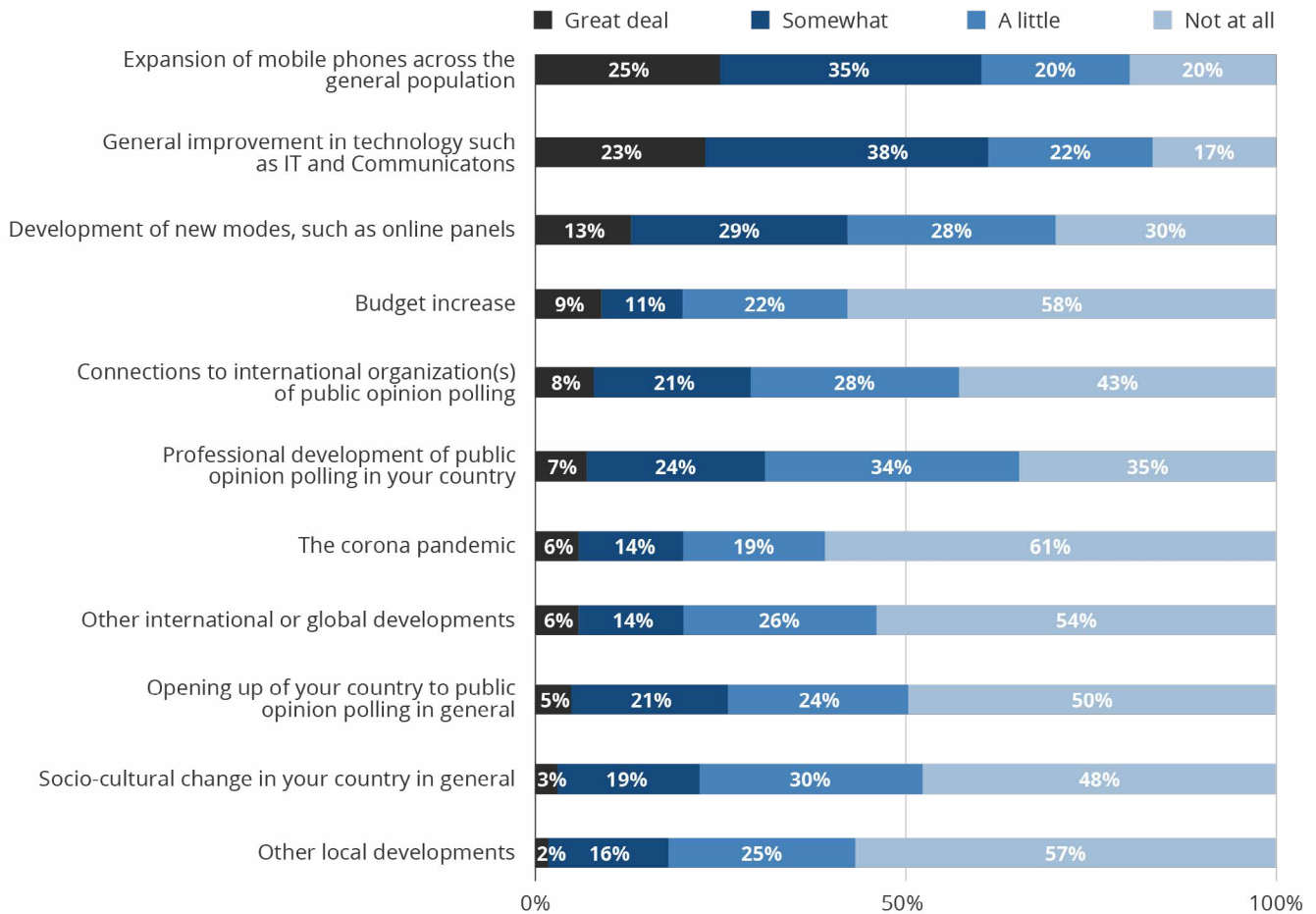


Beyond the factors that make public opinion research a more challenging activity, we also studied the causes that contribute to making it easier to conduct surveys. In this respect, the greatest factors are improvements in IT and communications technology (61%) and the expansion of mobile phones across the general population (60%). These two factors are also

partly linked with the development of new public opinion research modes, such as online panels, mentioned by 42% of countries. Other positive changes have been associated with the overall professional development of public opinion polling (31%), opening up of the country to polling in general (26%), and connection to international organizations in this field (29%) (Figure 14).

RESEARCH MODES AND RESEARCH DIFFICULTIES

Figure 14: “How much do you think each of the following changes has made it easier to conduct opinion polls in your country, compared to five years ago?”



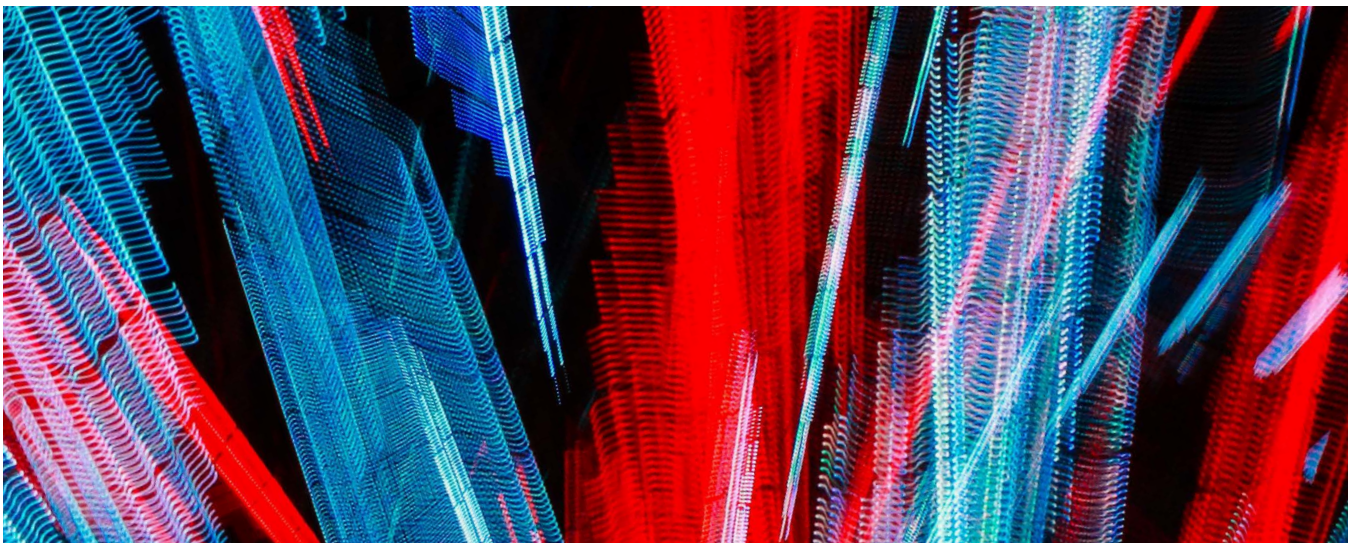
As with obstacles to polling, advancement in public opinion research happens unequally throughout the world. For instance, the corona pandemic has had a positive effect on polling predominantly in Sub-Saharan Africa (29%) and North America & the Caribbean (29%). Development of new modes like online panels largely occurred in Europe (51%) and Latin

America (46%), to a smaller extent in Asia Pacific Oceania (39%). Expansion of mobile phones among the population fueled polling projects in Sub-Saharan Africa (70%), Asia Pacific Oceania (69%), West Asia & North Africa (62%). The same regions report the greatest breakthroughs in the general improvement of IT and communications technology and their positive influence on

RESEARCH MODES AND RESEARCH DIFFICULTIES

public opinion research. Overall professional development of polling was most frequently acknowledged by experts in Sub-Saharan Africa (37%) and to a lesser extent in North America & the Caribbean (14%). Opening countries to public opinion research in general occurred in Sub-Saharan Africa (41%) and West Asia & North Africa (27%). Connections to international organizations have been decisive in Sub-Saharan Africa (49%), West Asia & North Africa (32%), and Asia Pacific Oceania (30%). If all positive causes are summarized, countries with the least number of factors named as working towards to improvement of polling are Algeria, Denmark, Egypt, Guyana, Honduras, Kyrgyzstan, Nicaragua, Sweden, Turkmenistan, Ukraine, and Venezuela. On the other hand, countries where experts acknowledge the greatest number of improvements include Benin, Botswana, Gabon, Kazakhstan, Nigeria, and Zimbabwe.

To summarize, the years 2017-2022 have been challenging for public opinion researchers all over the world. In the vast majority of countries, experts stress that it is now more difficult to conduct public opinion polls as compared to five years ago. The coronavirus pandemic, while boosting the expansion of IT and communication technologies and stimulating their utilization in the field of public opinion research, also brought economic decline with numerous budget cuts and growing data collection costs. Declining response rates, item non-response, growing concerns over data privacy, and security of F2F interviewers are among the concerns of professionals in the polling industry. The 2022 survey has also shown that the support of international organizations in this field has been crucial for public opinion research in developing regions – something that organizations such as ESOMAR and WAPOR should definitely aim to enhance in the next several years.



05

EDUCATING THE PROFESSION, KEY CONSUMERS, AND THE PUBLIC

EDUCATING THE PROFESSION, KEY CONSUMERS, AND THE PUBLIC

In order to improve the quality of polling in any country, it is necessary to provide training and education to practitioners, journalists, and decision-makers. This chapter provides an overview of perceptions of these programs and the efforts of research organizations to improve the quality of polling. Educational programs are available in many places but not everywhere.

TRAININGS AND EDUCATION FOR OPINION POLLING

In only a third of countries, experts report that university training courses for opinion polls exist within their country. When they do exist, they are primarily within faculties of Social Sciences and Survey Methodologies, where theoretical knowledge can be complemented with practical experience. In a third of the countries, respondents cite the presence of non-university courses (often conducted by associations such as WAPOR and ESOMAR), or even from private research agencies or local associations.

AWARENESS AND CONFORMITY OF CODES AND GUIDELINES

The role of market and opinion research associations in promoting the principle of self-regulation is key throughout the world.

In 2022, 30% of the countries report the existence of a professional association or other group responsible for addressing complaints about election polls, compared to just 24% five years ago. Government bodies have been even more proactive in the field of regulation, with 30% of countries providing some form of responsibility in controlling and regulating election polls, compared to just 22% five years ago.

Professional associations are much more dominant in North America & the Caribbean (71%), Europe (41%), and Sub-Saharan Africa (38%). About two-thirds (65%) of the countries with professional associations that deal with election polls are in those two regions. Government bodies play a larger role in regulating opinion polls in Sub-Saharan Africa, West Asia & North Africa, and Latin America.

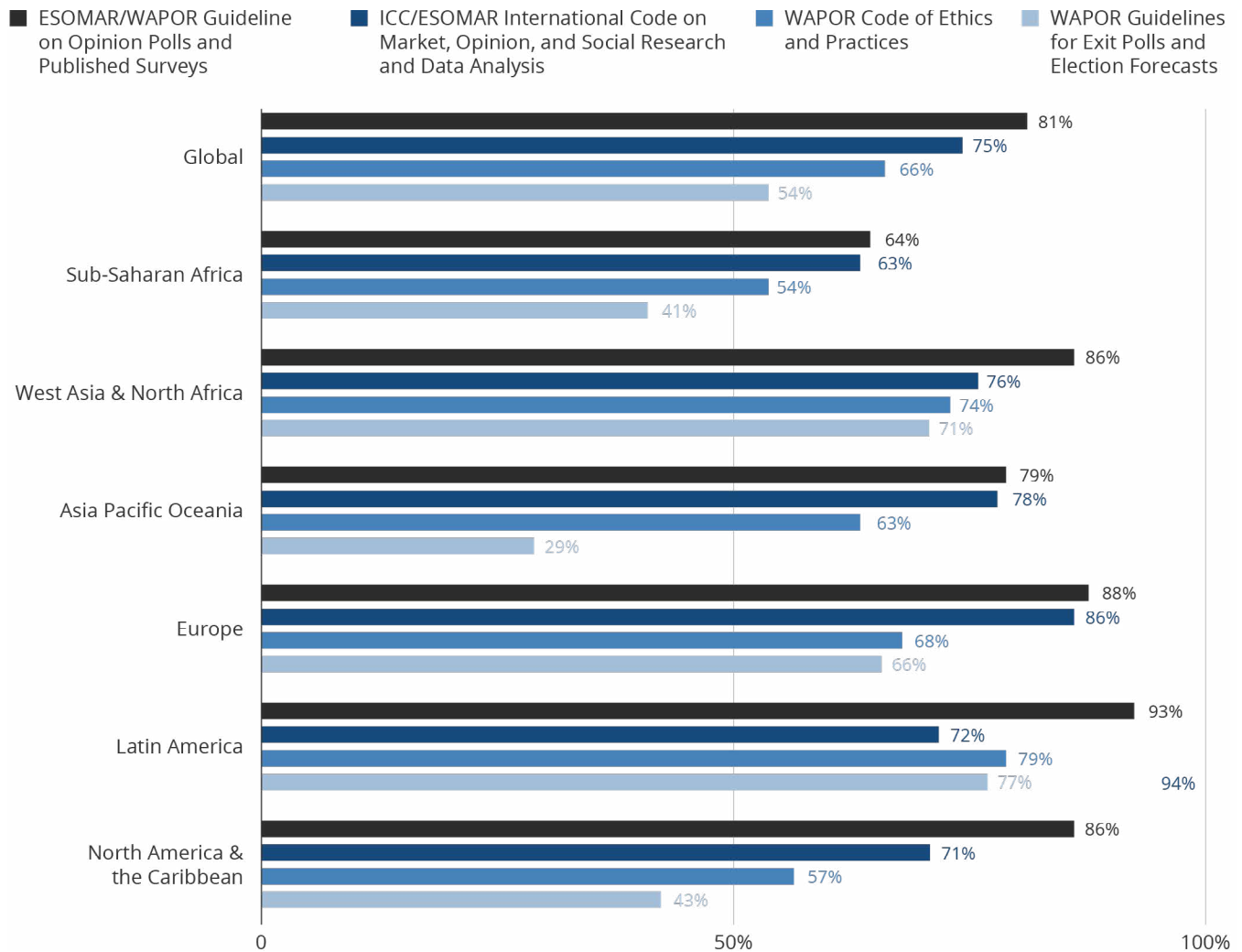
In many places, especially in Asia Pacific Oceania, Latin America, and West Asia & North Africa, there is a lack of both government control and professional associations able to recommend good practice in conducting or reporting election polls.

The consequence of having no professional organization is that many of those conducting opinion polls are not sufficiently familiar with existing codes of ethics, or even aware of them. Half of the experts in the countries studied – individuals who are knowledgeable about the polling situation in those countries – say they are very familiar with the ESOMAR/WAPOR Guideline on Opinion Polls and Published Surveys, with only two of ten reporting that they are only a little or not at all

familiar with it. Similar numbers can be seen with regard to the ICC/ESOMAR International Code on Market, Opinion and Social Research and Data Analysis. Given that two-thirds of the respondents in the survey are WAPOR members or National Representatives, it is concerning that only four in ten describe themselves as very familiar with the WAPOR Code of Ethics and Practices, and only three in ten are very familiar with the WAPOR Guidelines for Exit Polls and Election Forecasts.



Figure 15: Familiarity with Professional Codes and Guidelines [Reporting “Very” or “Somewhat Familiar” values]



Familiarity with and conformity to codes of ethics and professional standards are closely correlated. Within Europe, 44% of respondents say that most pollsters generally conform to these codes, and another 21% state at least some do. Similarly, in 57% of countries in North America & the Caribbean, experts say that most pollsters conform to the codes as well. Unfortunately,

only a third of those polled in countries within the Sub-Saharan African and the West Asia & North African regions report that most pollsters are conforming to the ethics codes. Having professional associations present organizational standards locally can contribute to improving greater conformity to the codes around the globe.

Table 6: Survey Professionals Conforming with these Professional Codes [Reporting “Most,” “Some,” or “Few”]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Most	22%	14%	2%	8%	44%	10%	57%
Some	30%	24%	30%	41%	21%	58%	0%
Few	22%	26%	36%	14%	20%	21%	14%

WHAT CAN ESOMAR AND WAPOR DO TO SUPPORT OUR FREEDOMS?

It is essential that ESOMAR and WAPOR address these findings by working to disseminate their professional codes of conduct more actively – and as broadly as possible. When asked about what WAPOR and ESOMAR can do to help pollsters conduct and publish opinion polls in their countries, there was a resounding call to raise more awareness with regard to opinion polling and to desensitize taboo topics.

In many places, experts report a lack of understanding of methodological rigor, transparency, and unbiased reporting among those who report opinion polls and those who read those reports. The quality of poll reporting continues to be seen by many as poor. The need for training workshops with journalists and media agencies so they do not misrepresent data, public awareness campaigns, and desensitizing taboo topics are all seen as urgent action items by many for international associations such as WAPOR and ESOMAR.

Other respondent suggestions include:

- Setting up public opinion/survey faculties in universities
- Raising awareness about the code of ethics
- Educating public/media on opinion polling and data representation
- Greater discussions on fieldwork methodologies
- Establishing relationships between universities/government/regulators
- Translating the code of ethics
- Comparative cross-country/regional public opinion reports
- Desensitizing taboo topics
- Providing framework/quality guidelines to help upkeep quality of opinion polls
- Sharing best practices from other markets
- Continuing to establish/maintain/update codes and standards

APPENDIX 01

SURVEY METHODS

APPENDIX 01: SURVEY METHODS

INTRODUCTION

This survey of global freedom to conduct and publish public opinion surveys (hereafter, The Freedom Survey) was jointly conducted by ESOMAR and WAPOR. It is the seventh iteration of a project begun in 1984.

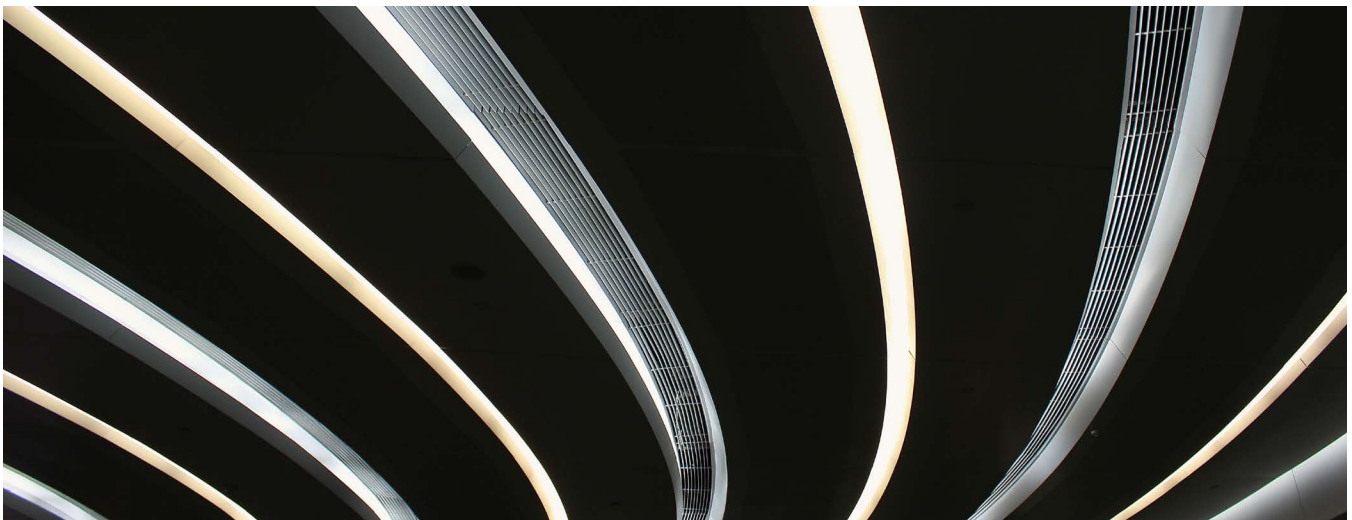
All data developed as a part of this study have been collected, processed, and stored in a manner compliant with the EU's GDPR – General Data Protection Regulation. In order to protect survey participants, ESOMAR and WAPOR will not release any personally identifiable information. Any questions about the dataset and our compliance with the GDPR should be directed to the organizations' Professional Standards Committees Chairs:

Dr. David A. Jodice, WAPOR Chair Professional Standards, 2021-2022 was responsible for the conduct of the project on behalf of WAPOR.

David.Jodice@D3Systems.com

Ms. Judith Passingham, ESOMAR Chair Professional Standards,

Judith.Passingham@psc.esomar.org



SURVEY DESIGN

This survey was similar in design and execution to the 2017 and 2012 Freedom Surveys, except as noted below. As in 2012 and 2017, the 2022 Freedom Survey was conducted online, this time using the online survey platform developed and managed by the Data Archive of the World Values Survey Association in Madrid, Spain and the Institute for Comparative Survey Research in Vienna, Austria, under the direction of the Vice-Director of the Institute and Member of the WAPOR Council Dr. Kseniya Kizilova. The survey began fieldwork in the first quarter of 2022, with the fieldwork phase extended through the end of June 2022 in order to add more countries. The Freedom Survey response history is summarized in Table 7.

The current Freedom Survey:

- Increased the number of countries covered in the survey to 157 from 133 in 2017, with most of the gains occurring in Sub-Saharan Africa.
- Extended the questionnaire to cover more topics and allow for more qualitative responses across a range of items.
- Retained all completed questionnaires, even when there was more than one response per country. For those countries with more than one completed questionnaire, responses were weighted accordingly (.5 each for countries with two responses and .33 for countries with three responses).⁷
- The questionnaire can be accessed via [WAPOR's website](#).

Table 7: The Freedom Survey, 1984 – 2022

Year	Number of Countries	Sponsorship	Data Collection Methods
1984	49	WAPOR	Postal
1992	57	ESOMAR & WAPOR	Postal
1996	78	ESOMAR & WAPOR	Postal
2002	66	ESOMAR & WAPOR	Online
2012	85	ESOMAR & WAPOR	Online
2017	133	ESOMAR & WAPOR	Online
2022	157	ESOMAR & WAPOR	Online

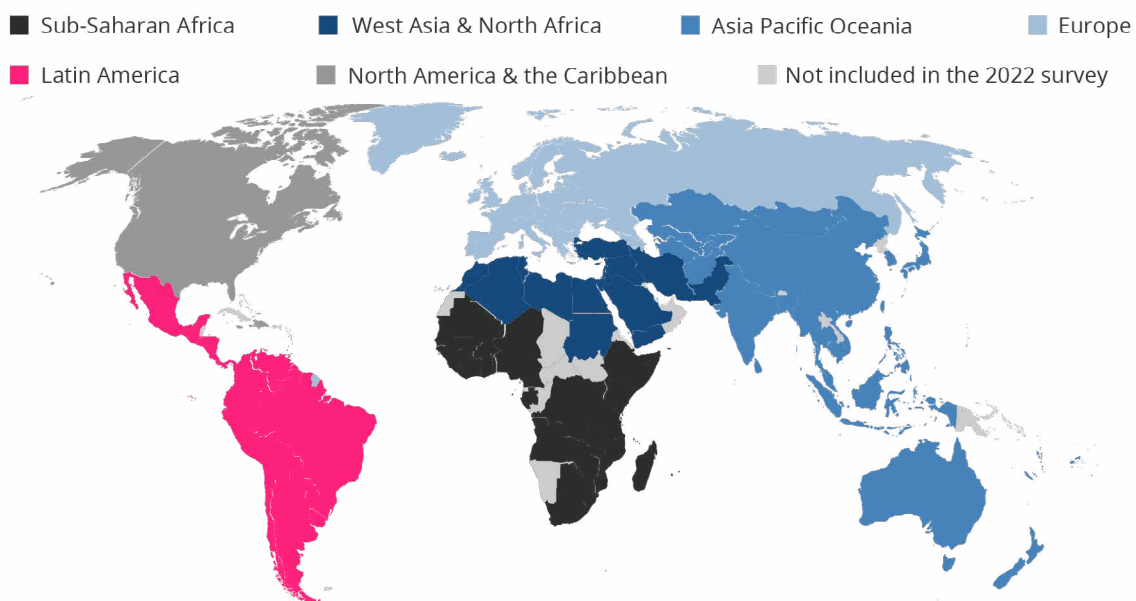
⁷ There are a total of 117 countries with one completed questionnaire, 38 countries with two completed questionnaires and 2 with three completed questionnaires.

APPENDIX 01: SURVEY METHODS

The regional groupings for 2022 are the same for North America & the Caribbean and Latin America (Figure 16). There have seen some changes for Europe, West Asia & North Africa, and Asia Pacific Oceania, and major changes have

been applied for countries in Sub-Saharan Africa. Our regional labels have been defined away from those that reflect a traditional Western point of view (such as Middle East) to be more geographically and culturally distinctive.

Figure 16: Regional groupings of countries that participated in the 2022 Survey



- The regional grouping for Africa has been redesigned to reflect the much larger number of countries included in the 2022 survey.
- The Maghreb countries previously included in Africa are now included in a region labeled West Asia & North Africa (extending from Morocco to Pakistan). Nearly all countries labeled as Middle East in 2017 would be in this group.
- Most other countries in Africa are in a group that has been labeled as Sub-Saharan Africa.
- Georgia, Armenia, and Azerbaijan are now included in Europe.

- We have also placed the three countries that were grouped in Oceania in 2017 into Asia Pacific, as the previous group of three countries did not provide much analytic power.

For those interested in comparing the results across the two most recent surveys using the regional groupings created for the 2017 study, please forward a request for data tables in Excel to WAPOR's Executive Director at WAPOROffice@gmail.com.

APPENDIX 01: SURVEY METHODS

The Freedom Survey is based on self-administered questionnaires, completed by subject-matter experts in the field of public opinion research. Both ESOMAR and WAPOR reached out independently to their networks of National Representatives through recognizable association email addresses, with multiple messages explaining the aims and goals of the study and providing the online survey link. To the greatest extent possible, we also reached out to experts (continuing members and National Representatives) who had participated in the 2017 Freedom Survey.

In countries where there were no current National Representatives, both organizations connected with members, and where there were no members, other opinion researchers were encouraged to participate in the Freedom Survey and then in WAPOR and ESOMAR.⁸ We also drew on the professional and business contacts of members from both the ESOMAR and WAPOR Professional Standards Committees.

Of the forty countries with more than one completed questionnaire, 32 fit the desired pattern

of having one respondent from ESOMAR and one from WAPOR. In two countries, we have responses from one WAPOR and two ESOMAR members, and in six countries, we have responses from two WAPOR members. The growth in coverage is due to participation by many members of both organizations. Twenty-six countries were uniquely covered by ESOMAR members, and 97 countries were uniquely covered by WAPOR members. This skew is not surprising given the public opinion focus of the WAPOR membership.

The Freedom Survey questionnaire was designed in Fall 2021. The questionnaire was scripted in January 2022, and the pilot questionnaire launched shortly after that. During the pre-test, 20 pilot questionnaires were completed, none of which were retained in the final dataset. For both the pilot and the main survey component, the Freedom Survey questionnaire was available in English only. During the pilot stage, comprehension and correspondence between questions and answer options, the logic of the question sequence, and the transitions among the sections of the survey were verified.

⁸ In four countries where WAPOR was unable to recruit a National Representative or member, the surveys were completed from another country, by an expert who had already completed the survey for his/her country of residence. These countries are Bahrain, Belarus, Guyana, and Paraguay. In a number of other countries which were mostly, but not exclusively, in Sub-Saharan Africa, a survey research professional from an Afrobarometer partner, IPSOS or Kantar completed one survey for a country in which they had survey experience, but in which he/she did not reside. Numerous countries such as French Guiana and Greenland are coded similarly to France and Denmark, respectively, as they are integral parts of both countries and subject to their constitutions and laws. The Professional Standards Committees of both ESOMAR and WAPOR offer our thanks to all whose participation made the 2022 Freedom Survey possible.

APPENDIX 01: SURVEY METHODS

The main data collection phase commenced in February 2022. All experts who participated in the Freedom Survey received an invitation email outlining the aims and goals of the study, which went beyond topics covered in the previous rounds to include measures examining the newest challenges to public opinion polling, including the coronavirus pandemic, interviewers' safety, and other issues. Survey participants were notified about the voluntary character of their participation and were guaranteed anonymity. Contact information for quality control has been stored separately, and the anonymized dataset of experts' responses has been used in analysis. On most questions, respondents answered as individual public opinion research experts and were invited to share their own opinion rather than the official position of their organization or state authorities in the country.

The questionnaire comprised about 50 questions, out of which 16 were open-ended ones so the participants could share more details of their specific experiences, as well as the provisions and limitations for conducting and publishing public opinion research in their country. Some questions required factual information (questions on legislation and regulations), while others were of an attitudinal or opinion nature. Finally, some questions were identified as key indicators (with the answer being required), and respondents could leave other questions unanswered if they felt the need to do so. The median duration of the survey was 36 minutes.

Every survey participant received a common survey link. After verifying the expert's name and email, the respondent was directed to a personalized online questionnaire page. [Verifying the respondent's identity was an important step in quality control assurance, given the expert nature of the study.] Access to the survey was granted upon the expert confirming their informed consent to the study. Of course, the experts could refuse to participate. Respondents could save their responses and return at a later time to finish the questionnaire. Time stamps were recorded by the system for every question.

Overall, these various quality control procedures generated data questions and corrections for about 65% of the completed questionnaires.

A few questionnaires were deleted from the dataset, as they were either substantially incomplete or were an unintentional duplicate entry by the same person. In cases where responses were missing, particularly on key questions about the freedom to conduct polls and publish results, there were follow-ups with respondents to fill in missing data and resolve conflicts between responses for the same country.

We also consulted the database maintained by the ACE (Administration and Cost of Elections Project) Electoral Knowledge Network (www.aceproject.org), used extensively in the 2017 Freedom Survey. Unfortunately, the database, while relatively up-

to-date for the 2017 survey, has not been updated recently on key issues (*Media and Elections, ME062: Blackout period for release of opinion polls*) since then. In most cases, experts provided information that was more timely and complete compared with the ACE database. Furthermore, in selected cases, ACE data left some room for interpretation. For example, in Australia, the 2-3 days blackout period only applies to broadcasters, while online services and print media can still publish election ads during the blackout period. Therefore, experts' responses were used as the primary source of information on the number of blackout days. Data from the ACE database were employed when the expert could not give an answer, and ACE included a valid reference dated 2018-2022.

EVENTS AFFECTING FREEDOMS DURING FIELDWORK FOR THE FREEDOM STUDY

While the Freedom Survey was in the field, a number of events occurred that directly impacted the ability of opinion researchers to conduct and publish opinion surveys. Two of the most prominent were:

The February 24, 2022 invasion of Ukraine by Russia, which severely disrupted the Ukrainian population (with both internal and external displacement) and impacted the ability of pollsters to conduct general population surveys. Despite the loss of territory in Eastern and

Southern Ukraine (Donetsk and Luhansk, where opinion research may or may not be feasible), it is still possible to conduct and publish public opinion surveys in Ukraine. The WAPOR National Representative for Ukraine completed the questionnaire based on the pre-war conditions and policies of Ukraine relative to opinion polling.

On May 18, 2022 (between the first and second questionnaires completed by our experts for Angola), the National Assembly of Angola passed legislation banning the conduct of polls and publication of opinion poll results during the Presidential election. The ban ended once the vote was completed on August 24, 2022.

LESSONS LEARNED

As with any project, there are some "lessons learned" that could improve the process, coverage, and content of future Freedom Surveys. Feel free to offer suggestions on these and any other topics.

- 01** Freedom Surveys should be conducted more often. More frequent surveys would keep the database of active participants up to date and make this an ongoing agenda item for National Representatives, members and professional colleagues. While annual surveys might be too frequent, biennial updates may be appropriate.

APPENDIX 01: SURVEY METHODS

- 02** Build the sample frame further ahead of the field period. The real-time sample build resulted in a longer than anticipated field period (February – June 2022), leaving less time for analysis and reporting.
- 03** Once the 2022 Freedom Report is completed, engage with the ACE Project to discuss how its database is updated and how WAPOR and ESOMAR can contribute. Of course, cooperating with ACE on the data about blackout periods will mean that project would no longer be an independent check on the ESOMAR/WAPOR data. But the ACE Project is

so valuable overall, the organizations should devote some resources to keeping Section ME062 up to date, which it was not for our 2022 Freedom Survey.

- 04** With 157 countries and territories included in the 2022 Freedom Survey, both WAPOR and ESOMAR will assess gaps in coverage and what can be done to boost both membership and the National Representatives networks, in order to increase the percentage of countries in the next survey with two completed questionnaires, one from each organization.



APPENDIX 01: SURVEY METHODS

Table 8: Regional Groupings						
2022						
Africa (N=35)	West Asia North Africa (N=21)	Asia Pacific Oceania (N=30)	Europe (N=45)		Latin America (N=19)	North America & Caribbean (N=7)
Angola	Algeria	Afghanistan	Albania	Poland	Argentina	Barbados
Benin	Bahrain	Australia	Andorra	Portugal	Bolivia	Canada
Botswana	Egypt	Bangladesh	Armenia	Romania	Brazil	Dominican Rep.
Burkina Faso	Iran	Cambodia	Azerbaijan	Russia	Chile	Haiti
Burundi	Iraq	China	Austria	Serbia	Colombia	Jamaica
Cameroon	Israel	Fiji	Belarus	Slovakia	Costa Rica	Trinidad Tobago
Cape Verde	Jordan	Hong Kong	Belgium	Slovenia	Ecuador	United States
Congo, D.R.	Kuwait	India	Bosnia Herz.	Spain	El Salvador	
Eswatini	Lebanon	Indonesia	Bulgaria	Sweden	Guatemala	
Ethiopia	Libya	Japan	Croatia	Switzerland	Guyana	
Gabon	Morocco	Kazakhstan	Cyprus	Ukraine	Honduras	
Gambia	Pakistan	Kyrgyzstan	Czechia	United Kingdom	Mexico	
Ghana	Palestine	Malaysia	Denmark		Nicaragua	
Guinea	Qatar	Maldives	Estonia		Panama	
Guinea Bissau	Saudi Arabia	Mongolia	Finland		Paraguay	
Ivory Coast	Sudan	Myanmar	France		Peru	
Kenya	Syria	Nepal	Georgia		Suriname	
Lesotho	Tunisia	New Zealand	Germany		Uruguay	
Liberia	Turkey	Papua New Guinea	Greece		Venezuela	
Madagascar	UAE	Philippines	Hungary			
Malawi	Yemen	Singapore	Iceland			
Mali		South Korea	Ireland			
Mauritania		Sri Lanka	Italy			
Mozambique		Taiwan	Kosovo			
Niger		Tajikistan	Latvia			
Nigeria		Thailand	Lithuania			
Senegal		Timor-Leste	Luxembourg			
Sierra Leone		Turkmenistan	N.Macedonia			
Somalia		Uzbekistan	Malta			
South Africa		Vietnam	Moldova			
Tanzania			Montenegro			
Togo			Netherlands			
Uganda			Norway			
Zambia						
Zimbabwe						

APPENDIX 01: SURVEY METHODS

Table 8: Regional Groupings						
2017						
Africa (N=24)	Asia, Middle East, and Eurasia (N=37)	Oceania (N=3)	Europe (N=41)		Latin America (N=19)	North America & Caribbean (N=6)
Angola	Afghanistan	Australia	Andorra	Poland	Argentina	Barbados
Botswana	Armenia	Fiji	Austria	Portugal	Bolivia	Canada
Cameroon	Azerbaijan	New Zealand	Belarus	Romania	Brazil	Dominican Rep.
Congo, D.R.	Bangladesh		Belgium	Russia	Chile	Jamaica
Egypt	China		Bosnia Herz.	Serbia	Colombia	Trinidad
Ghana	Georgia		Bulgaria	Slovakia	Costa Rica	Tobago
Guinea	Hong Kong		Croatia	Slovenia	Ecuador	United States
Ivory Coast	India		Cyprus	Spain	El Salvador	
Kenya	Indonesia		Czechia	Sweden	Guatemala	
Lesotho	Iran		Denmark	Switzerland	Guyana	
Libya	Iraq		Estonia	Ukraine	Honduras	
Morocco	Israel		Finland	United Kingdom	Mexico	
Nigeria	Japan		France		Nicaragua	
Senegal	Jordan		Germany		Panama	
Sierra Leone	Kazakhstan		Greece		Paraguay	
Somalia	Kuwait		Hungary		Peru	
South Africa	Kyrgyzstan		Iceland		Suriname	
Sudan	Lebanon		Ireland		Uruguay	
Tanzania	Malaysia		Italy		Venezuela	
Togo	Mongolia		Kosovo			
Tunisia	Myanmar		Latvia			
Uganda	Nepal		Lithuania			
Zambia	Pakistan		Luxembourg			
Zimbabwe	Palestine		N.Macedonia			
	Philippines		Malta			
	Qatar		Moldova			
	Saudi Arabia		Montenegro			
	Singapore		Netherlands			
	South Korea		Norway			
	Sri Lanka					
	Taiwan					
	Tajikistan					
	Thailand					
	Turkey					
	UAE					
	Vietnam					
	Yemen					

APPENDIX 02

DATA TABLES

APPENDIX 02: DATA TABLES

Q2: Which of the following institutions regularly commission public opinion polls in your country?
[Please select all that apply] [*Yes' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Government (national)	63%	37%	60%	61%	81%	74%	71%
Government (local)	37%	14%	27%	37%	50%	63%	29%
Media - TV	51%	37%	41%	34%	68%	71%	71%
Media - Print	49%	26%	37%	52%	64%	57%	57%
Political parties	62%	40%	40%	41%	84%	95%	86%
Private businesses	59%	44%	75%	38%	59%	89%	86%
Special interest groups	49%	44%	37%	58%	51%	43%	71%
Not-for-profit groups	56%	54%	44%	63%	60%	61%	29%
On-line news agencies	29%	19%	35%	32%	34%	29%	14%

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Q3: About which of the following topics are polls in your country conducted? [Please select all that apply] [‘Yes’ values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Elections and voting	85%	86%	62%	73%	96%	100%	100%
Rating political parties and leaders	80%	70%	56%	70%	96%	100%	100%
Rating government performance	88%	84%	84%	80%	91%	100%	100%
Political participation and voting intentions	86%	87%	69%	77%	91%	100%	100%
Social issues (gender, ethnic relations)	91%	87%	87%	89%	93%	100%	86%
Health policy	83%	78%	82%	92%	80%	89%	71%
Education	80%	78%	75%	80%	82%	84%	71%
The economy	91%	87%	89%	92%	96%	89%	100%
Environment	77%	62%	63%	88%	86%	79%	86%
Crime	70%	64%	44%	56%	78%	100%	100%
Religion	62%	43%	51%	68%	71%	76%	71%
Foreign policy	59%	41%	72%	54%	70%	59%	57%

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Q3: About which of the following topics are polls in your country conducted? [Please select all that apply] ['Yes' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
International relations	69%	52%	70%	78%	80%	61%	57%
Corona pandemic	90%	81%	83%	93%	96%	89%	100%

Q4A: Are any of the following polling subjects considered a taboo topic in your country, meaning that polls about this topic cannot be conducted? [Please select all that apply] ['Yes' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	n=157	n=35	n=21	n=30	n=45	n=19	n=7
Elections and voting	10%	13%	21%	22%	0%	0%	0%
Rating political parties and leaders	11%	19%	24%	18%	0%	0%	0%
Rating government performance	8%	20%	6%	12%	0%	0%	0%
Political participation and voting intentions	9%	14%	21%	15%	0%	0%	0%
Social issues (gender, ethnic relations)	3%	10%	2%	3%	0%	0%	0%
Health policy	2%	4%	4%	0%	0%	0%	14%

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Q4A: Are any of the following polling subjects considered a taboo topic in your country, meaning that polls about this topic cannot be conducted? [Please select all that apply] ['Yes' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
Education	1%	4%	4%	0%	0%	0%	0%
The economy	3%	11%	2%	0%	0%	0%	0%
Environment	1%	3%	0%	0%	0%	0%	0%
Crime	8%	14%	14%	12%	2%	0%	0%
Religion	11%	20%	26%	8%	2%	5%	14%
Foreign policy	5%	4%	16%	8%	0%	0%	14%
International relations	4%	4%	14%	5%	0%	0%	0%

Q4B: Are any of the following polling subjects considered a taboo topic in your country, meaning that polls about this topic cannot be published? [Please select all that apply] ['Yes' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Elections and voting	16%	23%	29%	30%	3%	0%	14%
Rating political parties and leaders	16%	26%	29%	27%	3%	0%	14%
Rating government performance	12%	16%	25%	20%	3%	0%	14%

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Q4B: Are any of the following polling subjects considered a taboo topic in your country, meaning that polls about this topic cannot be published? [Please select all that apply] [‘Yes’ values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Political participation and voting intentions	15%	20%	29%	27%	3%	0%	14%
Social issues (gender, ethnic relations)	11%	16%	19%	17%	3%	0%	14%
Health policy	4%	7%	9%	5%	1%	0%	0%
Education	5%	7%	12%	5%	1%	0%	14%
The economy	6%	9%	10%	8%	3%	0%	14%
Environment	3%	3%	2%	8%	1%	0%	0%
Crime	11%	17%	17%	17%	1%	5%	14%
Religion	18%	27%	43%	23%	3%	5%	0%
Foreign policy	8%	9%	25%	12%	1%	0%	0%
International relations	9%	9%	33%	12%	1%	0%	0%

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Q5: [Filter: Those who answered 'Yes' in Q3a 'Elections and voting'] How many companies conduct pre-election polls in your country?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=126)	(n=26)	(n=12)	(n=22)	(n=42)	(n=18)	(n=7)
Just 1 or 2	19%	53%	4%	18%	4%	11%	43%
3 to 5	33%	31%	38%	25%	46%	22%	14%
5 to 10	24%	6%	46%	6%	32%	44%	0%
More than 10	19%	0%	7%	39%	18%	22%	43%
Don't know	5%	10%	4%	11%	1%	0%	0%

Q6: Which of the following modes of administration are used to conduct public opinion polls in your country? [Please select all that apply] ['Yes' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
In person / face-to-face	91%	96%	98%	96%	77%	100%	100%
Online/web	77%	57%	87%	77%	92%	74%	71%
Telephone with landline phones only	42%	26%	74%	36%	42%	47%	43%
Telephone with mobile phones only	68%	61%	79%	81%	61%	79%	29%
Telephone with landline and mobile phones	64%	27%	60%	75%	88%	63%	57%
Interactive Voice Response (IVR)	20%	21%	11%	21%	23%	21%	29%
Mail/Postal (e.g. ABS sampling)	13%	7%	6%	19%	18%	0%	43%

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Q7: Which mode would you say is the dominant mode, the one that is used most for public opinion polling? ['Yes' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
In person / face-to-face	47%	70%	44%	60%	19%	53%	57%
Online / web	14%	3%	17%	7%	28%	5%	14%
Telephone with landlines only	2%	0%	5%	0%	3%	5%	0%
Telephone with mobile phones only	12%	23%	21%	7%	6%	12%	0%
Telephone with landline and mobile phones	20%	3%	10%	23%	34%	22%	29%
Interactive Voice Response (IVR)	1%	1%	0%	0%	0%	3%	0%
Mail / Postal (e.g. ABS sampling)	0%	0%	2%	0%	0%	0%	0%

Q8: If there are mixed-mode public opinion surveys conducted in your country, what is the most widespread combination of data collection modes?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
In person / face-to-face	64%	90%	82%	72%	34%	53%	71%
Online / web	37%	20%	36%	28%	62%	18%	57%
Telephone with landlines only	5%	0%	7%	7%	6%	8%	0%

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Q8: If there are mixed-mode public opinion surveys conducted in your country, what is the most widespread combination of data collection modes?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Telephone with mobile phones only	34%	57%	30%	35%	23%	27%	14%
Telephone with landline and mobile phones	43%	16%	29%	54%	64%	32%	57%
Interactive Voice Response (IVR)	1%	4%	0%	2%	1%	0%	0%
Mail / Postal	3%	3%	2%	2%	5%	0%	14%
There are no mixed-mode surveys	13%	11%	5%	10%	14%	32%	0%

Q9: Is it more or less difficult now to conduct public opinion polls in your country than 5 years ago?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Much more difficult	15%	13%	10%	25%	11%	13%	29%
Somewhat more difficult	29%	17%	18%	22%	47%	38%	14%
Nothing has changed substantially	35%	27%	42%	38%	35%	37%	28%
Somewhat less difficult	15%	30%	16%	12%	6%	7%	29%
Much less difficult	6%	13%	14%	3%	1%	5%	0%

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Q10: Regardless of general conditions, how much does each of the following contribute to making it more difficult to conduct public opinion polls in your country, compared to five years ago? Would you say they have had no effect at all, a little, somewhat or a great deal more difficult? [Aggregated 'Great deal' and 'Somewhat' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Declining response rates	45%	27%	33%	51%	54%	68%	29%
Budget cuts	60%	74%	37%	57%	57%	74%	43%
New government regulations	22%	43%	23%	17%	12%	21%	0%
Increasing item non-response	29%	29%	34%	28%	22%	49%	0%
Increasing concerns about data privacy	33%	30%	37%	34%	32%	33%	29%
Increased costs of data collection	60%	76%	40%	52%	54%	75%	71%
Increasing inaccessibility of some respondents due to physical barriers	30%	38%	31%	14%	46%	29%	30%
Increasing inaccessibility of some respondents due to crime and insecurity	22%	30%	26%	16%	4%	54%	29%

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Q10: Regardless of general conditions, how much does each of the following contribute to making it more difficult to conduct public opinion polls in your country, compared to five years ago? Would you say they have had no effect at all, a little, somewhat or a great deal more difficult? [Aggregated 'Great deal' and 'Somewhat' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Phasing out survey modes such as F2F	24%	27%	28%	21%	21%	30%	14%
The corona pandemic	50%	49%	34%	59%	47%	61%	57%
Other local crises	21%	40%	27%	17%	9%	18%	14%
Lack of recent government demographic statistics to support sample design and weighting	27%	39%	31%	18%	20%	39%	14%
Increase in the number of single person households	7%	4%	5%	7%	5%	16%	14%

Q11: And, how much do you think each of the following changes has made it easier to conduct opinion polls in your country, compared to five years ago. Would you say these events have had no effect at all, a little, somewhat or a great deal easier? [Aggregated 'Great deal' and 'Somewhat' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
The corona pandemic	20%	29%	16%	18%	14%	18%	29%
Budget increase	20%	44%	10%	17%	9%	16%	14%

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Q11: And, how much do you think each of the following changes has made it easier to conduct opinion polls in your country, compared to five years ago. Would you say these events have had no effect at all, a little, somewhat or a great deal easier? [Aggregated 'Great deal' and 'Somewhat' values reported]

	Global (n=157)	Sub-Saharan Africa (n=35)	West Asia & North Africa (n=21)	Asia Pacific Oceania (n=30)	Europe (n=45)	Latin America (n=19)	North America & the Caribbean (n=7)
Development of new modes, such as online panels	42%	37%	34%	39%	51%	46%	29%
Expansion of mobile phones across the general population	60%	70%	62%	69%	56%	48%	29%
General improvement in technology such as IT and communications	61%	66%	62%	68%	58%	56%	29%
Professional development of public opinion polling in your country	31%	37%	33%	28%	30%	34%	14%
Socio-cultural change in your country in general	22%	39%	27%	15%	14%	18%	14%
Opening up of your country to public opinion polling in general	26%	41%	27%	18%	20%	25%	14%
Other local developments	18%	39%	20%	15%	5%	18%	0%
Connections to international organization(s) of public opinion polling	29%	49%	32%	30%	16%	18%	29%
Other international or global developments	20%	40%	13%	25%	7%	11%	29%

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Q12: Rate the methodological quality of the public opinion polls published in your country? In general, are they of...

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Very high quality	17%	17%	16%	11%	21%	11%	29%
Somewhat high quality	43%	60%	42%	31%	35%	53%	43%
Neither high nor low quality	28%	17%	38%	38%	33%	13%	28%
Somewhat low quality	8%	4%	4%	12%	11%	10%	0%
Very low quality	4%	2%	0%	8%	0%	13%	0%

Q14: Rate the quality of journalistic reporting of public opinion poll findings in your country mass media? In general, are they of...

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Very high quality	2%	1%	5%	2%	4%	0%	0%
Somewhat high quality	21%	26%	10%	19%	23%	18%	29%
Neither high nor low quality	34%	34%	43%	24%	30%	40%	43%
Somewhat low quality	32%	33%	29%	42%	32%	26%	14%
Very low quality	11%	6%	13%	13%	11%	16%	14%

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Q15: [Filter: Those who answered 'Somewhat low' or 'Very low' in Q14] How much do each of the following contribute to the very or somewhat low quality of journalistic reporting of public opinion poll findings in your country? [Aggregated 'Great deal' and 'Somewhat' values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=69)	(n=15)	(n=9)	(n=17)	(n=19)	(n=8)	(n=2)
Insufficient understanding of scientific opinion polling	87%	90%	85%	97%	82%	94%	0%
Polls are not conducted frequently enough to gain the interest of journalists	54%	93%	66%	70%	22%	25%	0%
Relevant details about opinion polls are not reported (timing, sampling, sponsorship)	68%	69%	85%	73%	53%	88%	0%
Only topline results are reported	67%	59%	66%	73%	66%	94%	0%

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Q16: How would you rate the safety of in-person interviewers in your county when they are out conducting F2F interviews? Not taking into account the COVID-19 pandemic, but in terms of general conditions in your country, would you say that interviewers are...

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Very safe	46%	36%	36%	43%	74%	25%	29%
Somewhat safe	38%	48%	46%	40%	21%	33%	71%
Somewhat unsafe	11%	13%	9%	14%	5%	24%	0%
Very unsafe	5%	3%	9%	3%	0%	18%	0%

Q17/18: Are there any... [‘Yes’ values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
University training courses or degree programs available for opinion pollsters (and/or aspiring opinion pollsters) within your country?	36%	36%	31%	33%	46%	11%	71%
University training courses or degree programs available for opinion pollsters in nearby countries?	42%	50%	40%	33%	43%	33%	57%

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Q17/18: Are there any... [‘Yes’ values reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Non-university training courses, such as workshops, available for opinion pollsters within your country?	31%	29%	29%	30%	35%	23%	43%
Non-university training courses available for opinion pollsters in nearby countries?	33%	36%	33%	38%	26%	33%	43%

Q19: Is the methodological information regarding polls published in your country easily available?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Yes, easily (on pollsters’ websites, for example)	24%	20%	21%	19%	31%	26%	29%
Yes, but upon request and generally not easy	11%	17%	9%	18%	3%	5%	28%
It varies across pollsters	42%	32%	53%	35%	46%	50%	43%
Usually not accessible	20%	30%	10%	27%	17%	19%	0%
Don't know	1%	0%	2%	1%	0%	0%	0%
Other (Please specify)	2%	1%	5%	0%	3%	0%	0%

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Q20A: Are polling data generally available for additional analyses or archived in a publicly accessible data center?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Yes, and access is easy	9%	10%	2%	2%	15%	7%	14%
Yes, but access is difficult	18%	24%	26%	29%	6%	5%	14%
No, not to my knowledge	63%	57%	72%	64%	59%	80%	57%
Other (Please specify)	9%	9%	0%	3%	16%	8%	15%
Don't know	1%	0%	0%	2%	4%	0%	0%

Q21: To what extent are you familiar with each of the following Codes and Guidelines? [Aggregated 'Very' and 'Somewhat familiar' responses reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
ESOMAR/ WAPOR Guideline on Opinion Polls and Published Surveys	81%	64%	86%	79%	88%	93%	86%
WAPOR Guidelines for exit polls and election forecasts	54%	41%	71%	29%	66%	77%	43%

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Q21: To what extent are you familiar with each of the following Codes and Guidelines? [Aggregated 'Very' and 'Somewhat familiar' responses reported]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
WAPOR Code of Ethics and Practices	66%	54%	74%	63%	68%	79%	57%
ICC/ESOMAR International Code on Market, Opinion and Social Research and Data Analysis	75%	63%	76%	78%	86%	72%	71%

Q22A: In your opinion, do public opinion pollsters in your country generally conform to these codes and guidelines? Would you say...

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Most pollsters conform	22%	14%	2%	8%	44%	10%	57%
Some pollsters conform	30%	24%	30%	41%	21%	58%	0%
Few pollsters conform	22%	26%	36%	14%	20%	21%	14%
None conform	2%	7%	2%	0%	0%	0%	0%
It varies with the guideline or policy	10%	3%	16%	25%	7%	0%	14%
Other (Please specify)	1%	3%	0%	0%	0%	0%	0%
Don't know	13%	23%	14%	12%	8%	11%	15%

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Q23A: In your country is there a governmental body that is responsible for controlling the conduct (regulating) of election polls?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Yes	36%	51%	38%	22%	22%	53%	57%
No	55%	37%	50%	67%	71%	42%	43%
Don't know	9%	12%	12%	11%	7%	5%	0%

Q24A: In your country is there a professional association or other group that is responsible for addressing complaints about election polls?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Yes	30%	38%	15%	16%	41%	15%	71%
No	58%	46%	72%	67%	52%	72%	29%
Don't know	12%	16%	13%	17%	7%	13%	0%

Q25: In your country, is there a blackout period for pre-election opinion polls, during which polling results may not be released to the public?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Yes	46%	23%	43%	27%	65%	79%	29%
No	34%	49%	19%	39%	29%	16%	71%
Don't know	6%	14%	0%	8%	2%	5%	0%
No election polls	15%	14%	38%	27%	4%	0%	0%

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Q33A: 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).

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
No blackout	34%	49%	19%	39%	27%	16%	71%
Blackout 1-6 days	25%	6%	24%	13%	49%	32%	14%
Blackout 7+ days	18%	9%	19%	13%	18%	47%	15%
Blackout length unknown	2%	8%	0%	0%	0%	0%	0%
Unknown if have blackout	6%	14%	0%	8%	2%	5%	0%
No election polls	15%	14%	38%	27%	4%	0%	0%

Q26: Within the next 3-5 years, do you expect any change in your country in the rules regarding the blackout periods before elections?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Expect blackout periods to be imposed	2%	4%	0%	3%	0%	5%	0%
Expect a longer blackout period	3%	3%	5%	3%	3%	5%	0%
Expect no change	67%	51%	59%	64%	83%	71%	71%
Expect a shorter blackout period	5%	6%	0%	0%	4%	16%	0%
Expect blackout period(s) to be abolished	3%	6%	0%	3%	2%	0%	14%
Don't know	20%	30%	36%	27%	8%	3%	15%

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Q27: For the publication of public opinion polls in your country, which of the following must be disclosed, either because it is required by law or because of self-regulation by the media or polling industry? [Please distinguish between actual legal restrictions and limitations agreed or recommended on a voluntary basis. Please choose as many items as appropriate, multiple answers are allowed for each item].

	Global (n=157)	Sub-Saharan Africa (n=35)	West Asia & North Africa (n=21)	Asia Pacific Oceania (n=30)	Europe (n=45)	Latin America (n=19)	North America & the Caribbean (n=7)
Disclosed for publication of polls: Persons or agency that commissioned the opinion poll							
Legally required	26%	23%	24%	12%	34%	39%	29%
Required by code / self-regulation	45%	56%	42%	54%	45%	12%	43%
Not required	29%	21%	34%	34%	21%	49%	28%
Disclosed for publication of polls: Sponsor/funder of the opinion poll							
Legally required	21%	23%	14%	9%	29%	28%	14%
Required by code / self-regulation	33%	34%	43%	45%	29%	15%	29%
Not required	46%	43%	43%	46%	42%	57%	57%
Disclosed for publication of polls: Geographic coverage							
Legally required	23%	23%	12%	14%	26%	44%	14%
Required by code / self-regulation	51%	60%	52%	57%	49%	28%	43%
Not required	26%	17%	36%	29%	25%	28%	43%
Disclosed for publication of polls: Sample frame and design							
Legally required	21%	27%	9%	11%	23%	45%	0%
Required by code / self-regulation	44%	55%	45%	37%	49%	22%	43%
Not required	35%	18%	46%	52%	28%	33%	57%

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Q27: For the publication of public opinion polls in your country, which of the following must be disclosed, either because it is required by law or because of self-regulation by the media or polling industry? [Please distinguish between actual legal restrictions and limitations agreed or recommended on a voluntary basis. Please choose as many items as appropriate, multiple answers are allowed for each item].

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Disclosed for publication of polls: Sample supplier							
Legally required	12%	26%	9%	9%	9%	6%	14%
Required by code / self-regulation	26%	45%	25%	21%	21%	7%	29%
Not required	62%	29%	66%	70%	70%	87%	57%
Disclosed for publication of polls: Characteristics of the sample							
Legally required	21%	27%	9%	9%	24%	33%	14%
Required by code / self-regulation	40%	49%	48%	33%	36%	39%	43%
Not required	39%	24%	43%	58%	40%	28%	43%
Disclosed for publication of polls: Margin of error							
Required by code / self-regulation	20%	17%	5%	11%	27%	39%	14%
Required by code / self-regulation	49%	62%	53%	47%	43%	33%	57%
Not required	31%	21%	42%	42%	30%	28%	29%

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Q27: For the publication of public opinion polls in your country, which of the following must be disclosed, either because it is required by law or because of self-regulation by the media or polling industry? [Please distinguish between actual legal restrictions and limitations agreed or recommended on a voluntary basis. Please choose as many items as appropriate, multiple answers are allowed for each item].

	Global (n=157)	Sub-Saharan Africa (n=35)	West Asia & North Africa (n=21)	Asia Pacific Oceania (n=30)	Europe (n=45)	Latin America (n=19)	North America & the Caribbean (n=7)
Disclosed for publication of polls: Response rate							
Legally required	12%	21%	2%	10%	11%	11%	0%
Required by code / self-regulation	38%	52%	46%	35%	23%	35%	57%
Not required	50%	27%	52%	55%	66%	54%	43%
Disclosed for publication of polls: Mode of interview (telephone, in-person, online)							
Legally required	21%	21%	7%	14%	30%	28%	14%
Required by code / self-regulation	53%	54%	66%	57%	51%	33%	57%
Not required	26%	25%	27%	29%	19%	39%	29%
Disclosed for publication of polls: Dates of data collection							
Legally required	25%	25%	8%	18%	32%	39%	14%
Required by code / self-regulation	52%	64%	61%	48%	50%	33%	43%
Not required	23%	11%	31%	34%	18%	28%	43%
Disclosed for publication of polls: Question wording							
Legally required	18%	17%	5%	14%	22%	28%	29%
Required by code / self-regulation	33%	46%	49%	33%	27%	17%	14%
Not required	49%	37%	46%	53%	51%	55%	57%

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Q27: For the publication of public opinion polls in your country, which of the following must be disclosed, either because it is required by law or because of self-regulation by the media or polling industry? [Please distinguish between actual legal restrictions and limitations agreed or recommended on a voluntary basis. Please choose as many items as appropriate, multiple answers are allowed for each item].

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Disclosed for publication of polls: Method of recruiting respondents or panel members							
Legally required	8%	14%	5%	9%	9%	0%	0%
Required by code / self-regulation	39%	50%	47%	40%	33%	20%	43%
Not required	53%	36%	48%	51%	58%	80%	57%
Disclosed for publication of polls: Sample size							
Legally required	24%	23%	8%	18%	31%	44%	14%
Required by code / self-regulation	52%	57%	62%	53%	54%	28%	43%
Not required	24%	20%	30%	29%	15%	28%	43%
Disclosed for publication of polls: Description of weights (if applicable)							
Legally required	8%	11%	0%	5%	9%	17%	0%
Required by code / self-regulation	37%	44%	43%	36%	32%	23%	57%
Not required	55%	45%	57%	59%	59%	60%	43%

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Q29: In your country, are there legal restrictions on the conduct of exit polls?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Exit polls cannot be conducted at all	11%	15%	17%	10%	2%	16%	29%
Exit polls cannot be conducted inside the polling station	15%	13%	17%	8%	14%	29%	14%
Exit polls cannot be conducted within a specified distance from the polling station (Specify distance)	10%	8%	0%	15%	11%	11%	14%
No restrictions, but no exit polls have been conducted to date	20%	39%	12%	22%	16%	5%	14%
No restrictions, and some exit polls have been conducted	32%	3%	41%	26%	55%	34%	29%
Don't know	12%	22%	13%	19%	2%	5%	0%

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Q30: Are there legal restrictions or self-regulations on the publication of exit polls by the media?
 [Please choose as many items as appropriate, multiple answers are allowed for each item.]

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Exit poll media restrictions: Exit polls cannot be published before all polls in the country have closed							
Legally	49%	37%	53%	30%	61%	70%	33%
Code / self-regulation	18%	30%	18%	12%	13%	12%	33%
No restrictions	33%	33%	29%	58%	26%	18%	34%
Exit poll media restrictions: Exit polls cannot be published before all polls in the polling area (state, region, district) close							
Legally	44%	32%	36%	29%	58%	71%	33%
Code / self-regulation	21%	31%	27%	19%	14%	7%	50%
No restrictions	35%	37%	37%	52%	28%	22%	17%
Exit poll media restrictions: Exit polls cannot be published by the media							
Legally	18%	28%	26%	7%	5%	35%	29%
Code / self-regulation	16%	26%	24%	9%	10%	6%	43%
No restrictions	66%	46%	50%	84%	85%	59%	28%

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Q34A: Are you aware of any legal prosecutions of companies, institutions or individuals who have commissioned public opinion polls in your country in the past five years?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Yes	12%	12%	19%	13%	10%	11%	0%
No	74%	73%	62%	75%	75%	75%	100%
Don't know	14%	15%	19%	12%	15%	14%	0%

Q34C: Are you aware of any legal prosecutions of companies, institutions or individuals reporting results of public opinion polls in your country in the past five years?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Yes	10%	3%	18%	14%	7%	16%	0%
No	74%	75%	61%	71%	77%	75%	100%
Don't know	16%	22%	21%	15%	16%	9%	0%

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D1: Which one of the following best describes what you do?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Academic researcher or faculty	16%	4%	19%	21%	13%	26%	29%
Student	1%	3%	3%	0%	0%	0%	0%
Survey research client/buyer/sponsor	5%	9%	13%	3%	1%	0%	14%
Survey research provider	66%	69%	55%	62%	73%	71%	43%
Political consultant	1%	1%	5%	0%	0%	0%	0%
Researcher at a non-profit organization, NGO or foundation	6%	5%	3%	7%	11%	0%	0%
Other (Please specify)	5%	9%	2%	7%	2%	3%	15%

D2: For how many years have you been working as a professional in the public opinion research field?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
This is my first year	5%	6%	6%	7%	1%	11%	0%
2-5 years	5%	18%	0%	0%	3%	0%	0%
6-10 years	14%	27%	15%	10%	11%	11%	0%
11-20 years	30%	39%	44%	33%	30%	10%	0%
More than 20 years	46%	10%	35%	50%	55%	68%	100%

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D3: If applicable, how many years have you been teaching public opinion research?

	Global (n=157)	Sub-Saharan Africa (n=35)	West Asia & North Africa (n=21)	Asia Pacific Oceania (n=30)	Europe (n=45)	Latin America (n=19)	North America & the Caribbean (n=7)
This is my first year	2%	6%	7%	0%	1%	0%	0%
2-5 years	11%	12%	2%	7%	18%	5%	14%
6-10 years	10%	9%	20%	8%	11%	6%	0%
11-20 years	14%	9%	22%	13%	14%	18%	0%
More than 20 years	13%	6%	22%	14%	3%	23%	57%
Not applicable	50%	58%	27%	58%	53%	48%	29%

D4: To what extent are cross-national opinion polls a part of your work? Do you conduct them...

	Global (n=157)	Sub-Saharan Africa (n=35)	West Asia & North Africa (n=21)	Asia Pacific Oceania (n=30)	Europe (n=45)	Latin America (n=19)	North America & the Caribbean (n=7)
Never	20%	21%	16%	32%	9%	24%	29%
Once a year or less often	29%	40%	20%	23%	27%	25%	43%
More than one per year	47%	31%	62%	38%	64%	46%	14%
Prefer not to say	4%	8%	2%	7%	0%	5%	14%

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D5: Gender

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Male	71%	87%	92%	65%	56%	68%	71%
Female	29%	13%	8%	35%	44%	32%	29%

D6: Which of the following best describes your education experience?

	Global	Sub-Saharan Africa	West Asia & North Africa	Asia Pacific Oceania	Europe	Latin America	North America & the Caribbean
	(n=157)	(n=35)	(n=21)	(n=30)	(n=45)	(n=19)	(n=7)
Bachelor's degree or less	17%	27%	2%	24%	13%	5%	28%
Master's or professional degree	51%	69%	34%	51%	51%	51%	29%
Ph.D	31%	4%	64%	25%	34%	39%	43%
Prefer not to say	1%	0%	0%	0%	2%	5%	0%