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WORLD ASSOCIATION FOR PUBLIC OPINION RESEARCH

Esomar/WAPOR Guideline on Opinion Polls and Published Surveys

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WAPOR
WORLD ASSOCIATION FOR PUBLIC OPINION RESEARCH

About WAPOR

Founded in 1947, WAPOR is the world's leading professional association advocating for the integrity of public opinion research worldwide. Our members, including academics, polling professionals, media and students across more than 100 countries, share a common commitment to rigorous research.

Through the code of ethics, peer-reviewed publications, educational programmes and growing network of national representatives, WAPOR promotes the right to conduct and publish public opinion research freely, and continually raises the methodological standard of the profession, in both established democracies and emerging ones. The association provides a forum for sharing knowledge across regions and disciplines and for strengthening the role of reliable public opinion research in public life. **www.wapor.org**

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1 Introduction

Why do polls matter?

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Polls and surveys are routinely conducted in many countries to measure public opinion, attitudes and behaviours – not just support for political parties and candidates. For many people, poll results are a ubiquitous part of everyday life, frequently published in media.

Properly conducted and disseminated opinion polls and surveys use scientific statistical methods to provide the public, politicians, the media and other interested groups with access to accurate and objective measures of public attitudes, intentions and behaviour.

This Esomar/WAPOR Guideline on Opinion Polls and Published Surveys is designed to address particular issues in the collection and reporting of opinion poll and survey information. We have issued this Guideline as part of the self-regulatory framework that applies to international research. The Guideline highlights the responsibilities of researchers to conduct opinion polls in a professional and ethical way and report them with sufficient transparency for the public to judge the quality of results. Both will help ensure public confidence in opinion polls and published surveys. This document also serves as a practical reference for those seeking to understand professional polling standards and disclosures.

Normative language: 'must' denotes requirements necessary for compliance with the ICC/Esomar and WAPOR Codes or applicable law; 'may' denotes optional practice where professional judgement applies.

1.1 Responsibility and scope

Opinion polls are subject to the same professional and ethical requirements as other forms of market and social research[1]. Those requirements are set out in the ICC/Esomar International Code on Market, Opinion and Social Research and Data Analytics (hereinafter 'the ICC/Esomar Code'). This is adopted by Esomar members and the International Chamber of Commerce (ICC), representing over 45 million members in more than 170 countries, and is recognised by over 60 associations in more than 60 countries. Requirements are also set out in the WAPOR Code of Professional Ethics and Practices (hereinafter 'the WAPOR Code') from 2021, adopted by members in over 100 countries, and to which researchers and research users must conform.

These Codes set minimum standards of professional and ethical conduct and are mandatory for all Esomar and WAPOR members and for those in other research associations and self-regulatory bodies that adopt and implement them. They are also intended to be followed by all those involved in or engaged with any part of the research process.

In addition to following the ICC/Esomar and WAPOR Codes, researchers must also comply with all applicable international and national laws, as well as local codes of conduct, professional standards or rules.

1 This Guideline applies to opinion polls and opinion-related surveys intended for public release (including publication by media, sponsors or researchers). It also applies to marketing and other surveys if they are published as opinion polling.

2 Fundamental principles

This Guideline includes five fundamental principles that encompass the role and relevance of market, opinion and social research and data analytics in the current environment. They are in the ICC/Esomar Code and are intended to underpin the interpretation and application of the Articles of the Code. While legality is the foundation, the principles uphold ethical standards that go above and beyond legal requirements.



1. All research must be legal[2], honest, transparent and truthful.



2. All research must be conducted with due care. Interactions must be fair, respectful and avoid harming the respondent.



3. Researchers must clearly communicate to respondents how their personal data will be collected and used. All personal data must be fully protected against unauthorised access or use.



4. Researchers must behave ethically and not do anything that may undermine the public's trust and confidence in research or damage its reputation.



5. Researchers have the overall responsibility and oversight for the research they undertake, irrespective of the method, technique and technology applied. Those who contribute to research have a degree of responsibility commensurate with their activities, expertise and control.

3 Relationships with participants

3.1 Professional responsibility and transparency

Respondents' cooperation is entirely voluntary, and they must not be misled when being asked for their cooperation (see ICC/Esomar Code Article 4a.iii. and WAPOR Code Sections V.A and V.D). This means that researchers, including interviewers, must:

1) Take all reasonable precautions to ensure that respondents are in no way harmed or adversely affected as a direct result of their participation in an opinion poll or research project (see ICC/Esomar Code Article 1). No-harm includes IT/device risks (e.g., installing apps, plugins or trackers). Any device interaction must be disclosed, optional and subject to explicit consent.
2) Ensure that potential respondents are contacted at appropriate times.
3) Promptly identify themselves and unambiguously state the purpose of the research as soon as practicable in light of the research design and enable respondents to check their identity and bona fides without difficulty. This is especially important, given the possible sensitivity of the subject (see ICC/Esomar Code Article 4a and WAPOR Code Section IV.A.7).
4) Not make statements or promises that they know or believe to be incorrect in order to secure the co-operation of respondents or others – for example, misrepresenting the likely length of the interview.

2 In addition to the ICC/Esomar and WAPOR Codes, polling may be subject to election-specific publication and conduct rules; researchers must identify and comply with such jurisdictional requirements.

5) Ensure accessibility in participation for vulnerable groups and safeguard all responses (and any record of a need for accessibility) in the collected data.

3.2 Honesty

As outlined in the ICC/Esomar[3] and WAPOR[4] Codes, and summarised above, researchers must be honest in their work with i) respondents, ii) clients, iii) the general public and iv) the broader survey research profession.

All opinion, social and market research must be clearly distinguished and separated from non-research activities that aim to take direct action toward an individual or change their attitudes, opinions or actions, rather than to inform public discourse and support sound decision-making through transparent, ethical research practice and reporting (see ICC/Esomar Code Article 1d).

Accordingly, researchers must not engage in practices that misrepresent legitimate survey research. This means that researchers must not:

1) Misrepresent as opinion research activities like political telemarketing or digital marketing, and any enquiry whose primary purpose is to obtain personally identifiable information about individuals for compiling or updating lists, obtaining names for sales, advertising, fundraising or other promotional approaches.
2) Attempt to sell anything (sales under the guise of survey research or 'sugging') or raise money (fundraising under the guise of survey research or 'frugging').
3) Engage in negative campaigning that is disguised as a political poll, such as push polling, which aims to persuade voters and affect election outcomes rather than measure public opinion.

Researchers must be honest in all phases of the survey from proposal and design through data collection to final submission of work products and public releases. Researchers must communicate how technical standards were or were not followed, explain the implications of deviations from agreed-upon expectations, and create comprehensive and accurate records documenting methods and procedures at each step in the project. Researchers must address concerns, scepticism and criticisms openly and respectfully, and be proactive in acknowledging project limitations and disclosing any errors that occurred.

3.3 Data protection and privacy

Researchers must respect the principles of data protection and privacy (see ICC/Esomar Code Article 6 and WAPOR Code Sections V.B and V.C). In some parts of the world, especially where democracy is not well established, respondents may be especially concerned about the impact of improper disclosure.

Researchers must:

1) Ensure that the rights of respondents are extended through all stages of the research, from data collection where appropriate measures are required to ensure that respondents understand and can exercise their rights not to participate or to withdraw from the research

3 The ICC/Esomar Code covers these points in the following articles: i) respondents: Articles 1 to 6, ii) clients: Articles 7 and 8, iii) the general public: Article 9 and iv) the broader survey research profession: Article 10.

4 The WAPOR Code covers these points in the following sections: i) respondents: Section V, ii) clients: Section IV.A, iii) the general public: Section II and iv) the broader survey research profession: Section IV.C.

interview at any time, to requiring that their personal data are not made available to others and deleting or rectifying incorrect personal data about them.

2) Ensure that only necessary personal information is collected and used only for specified research purposes. Researchers must withhold respondents' personal identity from the client/research user and may only share identifiable personal information under specific conditions:
   • The respondent has explicitly expressed this wish and/or
   • The respondent has given their explicit consent and
   • On the understanding that no commercial or political activity will be directed at them as a direct result of their having provided information.
3) Provide a privacy notice that is clear and readily accessible to respondents.
4) Ensure that an individual's identity cannot be inferred via deductive disclosure even when advanced analytic techniques or artificial intelligence (AI) are used.
5) Retain personal data no longer than is necessary and only for the initial purpose for which it was collected. After that, the personal data must be anonymised or deleted.
6) Not use participant data to generate synthetic personas/digital 'twin' datasets unless such usage is disclosed at the start of the survey and at the time of publication.
7) Take all reasonable precautions to ensure that personal data are held securely and protected from unauthorised access, e.g., from cyberattacks, hacking and similar intrusions, and other manipulation, modification or misuse of the data.
8) Have a duty of care, in the event of a data breach involving personal data, for the respondents involved. Researchers must follow all applicable data breach notification laws.

4 Relationships with clients

Contracts between research organisations and their clients must define the technical standards necessary for project design and implementation; require legal compliance with all applicable national and local laws and regulations; and ensure adherence to the ICC/Esomar Code and Section IV of the WAPOR Code.

Important Considerations related to contractual agreements
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5 Relationships with the general public

Researchers must not act in a way that could bring discredit to the profession or lead to a loss of public confidence in it (see ICC/Esomar Code Articles 1d and 9 and WAPOR Code Section II). Opinion polling depends on the public's willingness to participate and its confidence in opinion polls and published surveys. This means that researchers must:

1) Use appropriate statistical and scientific methods.
2) Be transparent about sampling, question wording and timing of the opinion poll as well as statistical adjustment methods when applicable.
3) Follow professional standards for disclosure (see section 7 in this document).
4) Not make claims which exceed the limits of the appropriate scientific principles on which opinion polling is based, such as claims about subgroups with sample sizes too small for statistical reliability.

6 Methodological quality and transparency

The two main characteristics of quantitative scientific polls are that respondents are chosen according to explicit statistical sampling criteria to ensure representativeness, rather than being self-selected, and that questions are worded in a balanced way. While fieldwork must remain consistent with the Esomar primary-data guideline and related WAPOR guidance, this Guideline specifies additional rules for opinion polls.

Researchers must:

1) Provide the client and research users with appropriate technical details of the research project carried out for the client and ensure that projects are designed, carried out, reported and documented accurately, transparently and objectively (see ICC/Esomar Code Article 7c and WAPOR Code Section IV.C).
2) Allow the client to arrange for independent checks on the quality of data collection and data preparation (see ICC/Esomar Code Article 7g and WAPOR Code Section IV.A).
3) Pay attention to the timing of the fieldwork, interviewer training, sample size and sample method.
4) Take all necessary precautions to identify or remove fabricated or falsified data.
5) Document any data cleaning rules applied before analysis and provide upon request a summary of any exclusions or modifications.
6) Document the controls to ensure respondent honesty when using incentives for recruitment/ completion.

6.1 Face-to-face interviewing

The face-to-face interview, where an interviewer meets a respondent in person, is conducted using paper and pencil, or via computer-assisted personal interviewing (CAPI). Face-to-face interviews may be costly and time-consuming, but have advantages due to the physical presence of interviewers. They are essential for collecting high-quality data, and for complex, long and difficult questionnaires, and usually achieve response rates higher than those for telephone or online interviews. When phone or internet availability is limited, face-to-face interviews may be the only viable option.[5]

Researchers conducting face-to-face research must be especially aware of:

1) The higher burden that face-to-face interviews put on interviewers, whose behaviour is visible to respondents. Interviewers must be well-trained in procedures for interviewing, be respectful and honest, and follow the principles outlined in section 2 of this document.
2) Local constraints (language, ethnicity, access) which may require necessary adaptations.
3) The impact of interviewer effects, that is, the influence of the interviewer, their manner of behaviour during the interview, and even their appearance and gender – on the answers given by respondents.

5 Given the evolving use of alternative interviewing mechanisms, including surveys conducted through video platforms (e.g., Zoom, Teams, Meet), it remains essential to uphold the same Fundamental Principles described in Section 2 above and the criteria outlined in this section.

4) The influence of interviewing in stressful electoral situations or on sensitive topics, which impact respondents' willingness to answer accurately. This possibility must be taken into account when analysing and reporting results.
5) Any inaccessibility to parts of the country for face-to-face interviews and recognise that polling results might include only interviews in accessible areas, which may limit the representativeness of results to only those areas.

6.2 Phone surveys

Phone surveys, where respondents are called and interviewed via a landline or mobile device, often using computer-assisted telephone interviewing (CATI) technology, are usually less costly and time-consuming than face-to-face surveys and offer additional opportunities for quality control and supervision of interviewers. As with face-to-face surveys, the use of an interviewer for a phone survey has both advantages and disadvantages. However, phone surveys are limited to those with access to a phone – and those without access may be different in important ways from those with access. Phone surveys can also be problematic if accurate information about the distribution of telephone numbers is unavailable to create a representative sampling frame, if researchers need to field a long or difficult questionnaire, or if a questionnaire requires showcards or other visuals. Phone surveys may also suffer from very low response rates reflecting the challenges in reaching potential respondents and an unwillingness of some respondents, if reached, to participate. Requirements for face-to-face interviewers provided in Section 6.1 also apply to phone interviews. In addition, researchers must:

1) Comply with anti-spamming laws that may prohibit unsolicited calls. Researchers must also be aware of policies by telecommunication companies that may protect customers from unwanted spam or illegal scam solicitations which may take the form of prerecorded voice or text messages, among others.
2) Be aware of the existence of do-not-call lists, some of which may limit even legitimate research, and other laws regulating calling hours and the use of automated diallers or automated or synthetic interviewers.
3) Report how call blocking is handled, whether via telephone operators or phone screening apps on individual devices, which may include a description of mitigation strategies such as whitelisting to bypass spam filters, multiple outbound numbers and research organisation identification via caller ID.
4) Document the sample mix of landline and mobile phone numbers based on the usage rates of each type of device and identify the sample sources or frames with associated levels of population coverage.
5) Consider potential danger to respondents due to their location and the time of the call. The safety of mobile respondents, in particular, must be established prior to interviewing, given that respondents may be driving, walking or have their attention otherwise occupied.
6) Document how eligibility to participate is determined, given the physical separation between respondent and interviewer. As one example, asking whether a phone is used for business or personal use can help establish eligibility.
7) Document how respondents are selected as probabilities of selection might need to be adjusted accordingly. For instance, landlines are often considered a household-level device requiring selection among eligible household members, whereas mobile phones are often considered a device owned by an individual who may be interviewed once eligibility is established. Researchers must be aware of local customs and practices regarding phone ownership and use that could affect respondent selection and selection probabilities, such as mobile-device sharing and use of multiple SIM cards by a single respondent.

8) Document whether interviewers are centrally located at a call centre or working remotely, and how interviewing is monitored to ensure quality in both settings.

6.3 Online polls

Most online polls are conducted using panels of pre-recruited respondents, though there are other methods. Methods for panellist recruitment include both probability sampling (where respondents are contacted by telephone or e-mail and asked to complete a survey online) and non-probability volunteer panels. Usually, the sample for a particular survey involves a second stage of selection to determine which panellists are invited to participate. The resulting sample is weighted to better represent the target population.

Researchers must employ sufficient safeguards to detect automated fraud (e.g., device fingerprinting, human verification techniques like CAPTCHA, hidden traps, duplication checks) and document their effects on data cleaning and exclusions.

Additional information is needed so readers can evaluate the poll's reliability and validity. This information may be more technical and must be available on a website of the research organisation or via the publication of the results. It must be made available when requested. That information includes:

1) Whether respondents were selected from a panel (or multiple panels), the names of the panels and whether they were created using probability or non-probability methods.
2) The method of selection of panellists for the particular study. This usually involves some form of stratification or quotas, intended to represent the target population. The variables used to define the strata, quotas, or other selection methods (such as matching and propensity score groups) must be included.
3) Response rates reflecting all recruitment stages. For probability sample panels, that means the cumulative response rate (reflecting recruitment, attrition and the within-panel response rate for a study). For non-probability panel samples, this means the participation rate (the number of panel members providing a usable response divided by the total number of initial personal invitations requesting members to participate).
4) The exact recruitment protocol (e.g., the use of ads or screener questionnaires) for polls based on respondents recruited via social media. This includes protocols to mitigate duplicate attempts. If applicable, the total number of social media users reached by recruitment efforts and the total number of interviews from unique persons.
5) The weighting variables and weighting methods.

6.4 Mixed modes

The use of multiple modes within a single poll is becoming common, especially as ways of insuring coverage for those groups that may be difficult to reach by the main polling method. For example, face-to-face interviewing may supplement phone interviewing in countries with relatively low phone penetration. The value of using multiple modes is the increased representativeness when combining methods; however, researchers must always be aware that different modes may produce different results. When mixed modes are utilised, the following information must be provided:

1) A detailed description of all the modes used, including methodological, selection and weighting procedures for each mode.
2) How all modes are used, including whether the modes are used sequentially, concurrently on

different samples or in any other ways.

3) How many cases were collected using each mode (when datasets are provided, include what mode was used to collect each case).
4) Whether questions were adapted for any of the modes.

6.5 Election and voting intention polls

Opinion polls taken before elections are highly scrutinised, in part because some people believe that projections may affect the way that people vote. The evidence for this belief is limited, with many studies finding little impact.

Objective poll results are just one of the many inputs on social and political issues. Other inputs include events, the news, political advertising and debates, and messages from individuals or organisations with a partisan or ideological viewpoint. Whatever the impact of pre-election polls, the public has the right to receive all kinds of information to help them make a voting choice.

Studies show that pre-election polls, when well-designed, can be accurate indicators of vote share[6] in their estimates of the vote for parties and candidates in an election, especially if they are conducted close to the election itself. [7]However, pre-election polls should not be seen as predictions per se; they should be described as a reflection of opinion at the time the poll was conducted. Researchers must recognise that new events and information may still change preference. People do change their mind, some even in the second before marking their vote on the ballot, and 'undecided' voters can have a decisive impact on the result. Furthermore, researchers must state if there is any evidence that respondents favouring one party or candidate may be unwilling to indicate their true preference or unwilling to participate in the poll.

Pre-election polls must take particular care in noting the timing of interviews (how long before an election the poll was taken), the sample from which results are being reported (all adults, those eligible to vote, those who are deemed most likely to vote) and which variables have been used to determine how likely voters have been determined. Researchers must also pay attention to election procedures and be sure to reflect them in the way questions are asked.

In conducting pre-election polls, researchers must:

1) Report the actual sample size on which the key vote preference findings are based. Pre-election polls must have a sample large enough to draw conclusions about voters.
2) Measure key variables such as likelihood of voting and (wherever possible) reasons for party choice or attitudes on issues or other aspects of the campaign. Such polls will have greater political and social value if in addition to measuring voting intention they also explore the reasons for party choice and opinions on important campaign issues.
3) Check the demographic profile for representativeness and, if necessary, apply weighting to correctly represent the electorate. Ensure that the population profile that is reported is that of electors eligible to vote rather than the 'all adults' profile normally used in commercial market research and non-election polls.

6 Jon Puleston, 'Are we getting worse at political polling', Esomar 2017, which included an analysis of 31,310 polls from 473 elections and voting events across 40 countries between 1936 and 2017. The conclusions were further validated through the expansion of the study with 1,400 polls across 29 elections between 2017 and 2022.

7 Sources include: Claire Durand, 'Changing Modes or Changing Pollsters? U.S. Presidential Election Polls From 2016 to 2024', SSRN, 2026 | Wolfgang Donsbach, 'Who's Afraid of Election Polls? Normative and Empirical Arguments for Freedom of Pre-Election Surveys', Foundation for Information, Esomar, 2001 | Catherine Marsh, 'Back on the Bandwagon: The Effect of Opinion Polls on Public Opinion', British Journal of Political Science 15 (1985), pp. 51–74.

4) Keep key elements of methodology consistent throughout the election campaign, where possible. This particularly applies to sampling method, question wording and the positioning of voting intention questions. If polls move to sample 'likely' voters later in the campaign, this adjustment must be clearly noted and described.
5) Ensure that, in omnibus surveys, political questions are not affected by the subject matter of the preceding questions. That may mean placing such questions near the beginning of the poll.
6) Provide the percentages that are 'undecided', 'don't know' or otherwise do not answer the vote question. These numbers must be published in all pre-election polls, along with percentages that say they will not vote. Any procedure designed to reallocate answers like 'undecided' or 'don't know' to a candidate or party must be clearly documented.
7) Take all possible steps to ensure that polls, especially those published in the last few days of an election campaign, provide reliable and objective information. In some countries, when election polls are conducted face-to-face, there may be concern about whether respondents will be willing to divulge their preference. If so, it is good practice to ask respondents to indicate their choice on paper and place it in a 'secret ballot box', much like an actual election ballot box.

Many countries have set limits on the length of time before elections for publishing pre-election polls. Researchers need to be aware of any such restrictions and try to conduct and publish the last wave of fieldwork as close to the election as possible (see Esomar/WAPOR worldwide update on the Freedom to Conduct and Publish Opinion Polls).

6.6 Exit polls

Important Considerations when conducting exit polls

Exit polls are mainly conducted on election day with voters interviewed as they leave polling stations and asked how they voted and, in many cases, why. They may be subject to laws about interviewer access (the distance from a polling place interviewers may stand) and about publication. In some places, they may include interviews conducted away from the polling place or polls of absentee and early voters done by phone or online. It is also possible to measure the vote of those who cast their ballots before election day at early vote polling places. Where early/mail voting is substantial, polls must include these voters or utilise and document a validated method to estimate the share of the vote from other sources (e.g., pre-election polls, administrative data), with limitations clearly stated.

Because of the speed with which the results are formulated and disseminated, and the fact that interviews are conducted with those who have already voted, unlike pre-election polls exit polls do predict election results. They also describe patterns of voter support for parties, candidates, and issues.

Researchers must:

1) Protect the identity of respondents in exit polls and must not maintain identifying information (e.g., name, address or other IDs) with the voter-level records or allow the dataset to enable deductive disclosure of respondents' identities. Researchers can limit this possibility by not revealing publicly small-area geographic details such as the specific polling place in which votes were cast.
2) Take special care about respondent confidentiality for interviewing conducted in a public place. Asking voters to complete a pencil and paper form that is then placed in a box without interviewer intervention, or having voters complete the interview privately on a hand-held

device is far preferable to an oral interview.

3) Be impartial. Exit polls are designed to collect data from voters and report information on electoral outcomes. They are not tools for partisan advocacy.
4) Use transparent, public and well-documented methods. These goals can be achieved by publicly describing the methods prior to conducting the exit poll and by adhering to the standards of minimal disclosure in this Guideline. Exit polls have supported extensive academic research efforts through the deposit of exit poll data in public archives and/or on websites for general access and further analysis. Those datasets must exclude individual identifiers and include appropriate survey documentation.
5) Adopt study designs that are suitable for producing accurate and reliable results and that follow accepted procedural and technical standards.
6) Follow generally accepted good survey practice. In places where voting takes place by mail or even by internet, exit polls may be conducted on election day itself or in the days preceding the event by methods like telephone or online. If interviewing at a polling place is forbidden or dangerous, interviews may also be conducted on election day at homes or other sites where polling is normally conducted. Special care must be taken in those circumstances to ensure that respondents actually are voters, and it may be inaccurate to refer to these polls as 'exit polls'.

6.7 Polls in times of crisis and other unstable conditions

Crises can range from natural events (e.g., earthquakes, floods, tsunamis and droughts) to social ones (e.g., military action, political repression, civil unrest and terrorism), be localised geographically or more widespread, and may be transitory or longer lasting.

Opinion surveys conducted in times of crisis require special considerations from researchers. Crises may disrupt typical on-the-ground fieldwork conditions and adversely affect data collection designs and fieldwork protocols.

If there is greater than minimal risk to conducting a survey during a crisis, regardless of its nature, scope and duration, then researchers must design projects that:

1) Prioritise the well-being, safety and security of respondents and field staff,
2) Mitigate the potential effect of the crisis on data quality as much as project resources allow, and
3) Quantify the impact of the crisis event on sampling representativeness and valid and reliable measurement.

Above all, researchers must fulfil their ethical obligations to both respondents and to field staff. The requirement that no harm comes to survey participants is particularly important in these circumstances.

Researchers must be honest and transparent with clients and the public about the data-quality trade-offs required to complete a project during crises and other unstable conditions.

7 Publishing results

When publishing results (by print, radio, television, online or other media), researchers must make available information about the methods used (see ICC/Esomar Code Article 9 and WAPOR Code Section IV.C). When results are published, researchers must provide a methods disclosure pack and require its publication or link. If the client declines, researchers must post the full methods online within 48 hours of first publication.

Transparency for published opinion and election polls is especially important, to maintain public confidence in poll results.

When publishing findings:

1) Researchers must not disseminate research or conclusions, nor allow their names or that of their organisation to be associated with such dissemination, unless these are adequately supported by the data.
2) Researchers must ensure that they are consulted on the form and content of any publication of the research findings by the client. Both the client and the researcher have a responsibility to ensure that published results are not misleading and that there is no undue selectivity of the findings.
3) Researchers and clients must ensure that the public has access to sufficient information, including data source, sampling and methodology, to assess the validity of the conclusions. This must be in a form that is easily understandable by the general public.
4) Upon a reasonable request, researchers must make additional technical information and clear documentation available in a timely manner sufficient to validate any published findings.
5) Researchers and clients must disclose whether AI, synthetic data, synthetic augmentation, or other emerging techniques and/or technologies played a significant role in sampling, deployment, analysis, or interpretation of the data, along with the methodological details, and disclose to what extent human oversight was involved.
6) If research involves the publication of a respondent's identity or other personal data, researchers must inform the respondent in advance about which data will be published and obtain their consent beforehand.
7) Researchers must clearly distinguish statements directly supported by estimates from interpretations or scenarios, and label commentary accordingly.

7.1 For all polls

When opinion poll results are published, researchers must keep their interpretations and statements fully consistent with the data. Limitations and weaknesses in the poll design, its execution, and the results must be noted in all reports and analyses. The following information must be included in the report, or made available online or in other published form:

1) The **names of the organisation which conducted the poll and its sponsor (the organisation(s) or person(s) who paid for the poll)**. If internal campaign polls are made public, it must be indicated that the data were collected for a political entity.
2) The **universe** effectively represented (i.e., who the poll intended to interview), whether the sample included all adults or only eligible or likely voters, the geographic range of the poll (country, province, state, electoral district, city) and whether certain groups were excluded from the design (those without landline telephones or internet access, or those living in inaccessible areas, for example).
3) The actual **sample size** (number of completed interviews included in the reported findings) and the **population coverage**. For multi-stage sampling, the number of sampling units (e.g., primary sampling units) must be included.
4) The **dates of fieldwork**.
5) The **sampling method** used. For non-probability samples, including quota samples, provide the characteristics by which the sample was selected.
6) The **method/mode of interviewing** (face-to-face, telephone interview, online panel, mixed

mode, etc.), data collection type (human/automated/self-completion) and interview operations (central call centre, remote or hybrid, and monitoring/supervision methods for each).

7) Whether **statistical adjustments, such as weighting**, were used to adjust the results, and which variables and which data sources were used in the adjustments. Supply both weighted and unweighted distributions of the weighting variables. This requirement does not extend to **proprietary algorithms.**
8) The **use of emerging technologies such as AI.** This is particularly relevant when creating synthetic data using data imputation to augment existing datasets, (sometimes done to specifications provided by the researchers themselves).
9) **The percentages of respondents who give 'don't know' answers** (and in the case of voting-intention studies, of those who say they will not vote.).
10) The **wording of questions** including response options to avoid possible ambiguity and misunderstanding.
11) **Whether the questions form part of a more extensive or 'omnibus' survey**, and a general indication of the placement of the questions in the questionnaire.
12) **On request, response rates** (using one of the definitions in the AAPOR Standard Definitions: Final Dispositions of Case Codes and Outcome Rates for Surveys).
13) For polls conducted in part or in whole online, **the source(s)** of the sample used.
14) Whether when results are compared over time **the modes are the same or different**. It is important to disclose any changes in mode or other ways the poll is conducted.
15) **Any use of social networks** for sample selection.
16) Whether there is **any systematic underrepresentation** of important groups in the poll or whether **adaptations were made** in the data collection process to deal with local constraints.
17) Any synthetic augmentation and the share of data used for estimates that is synthetic/ augmented.

7.2 For pre-election polls

For this Guideline, 'pre-election polls' are polls reporting current vote intention on a political office or question. Campaign-period polls may be subject to additional jurisdictional limits.

Researchers must disclose:

1) **The actual sample size of the likely voting population, on which key vote preference results are based**, which can be only a percentage of the total adult population.
2) **The proportion and distribution of likely voters.**
3) **Item non-response on vote preference questions**
4) **Any significant under-coverage of potential voters** that could affect results because of data collection methods (lack of phone or online access, for example).

7.3 For exit polls and election projections

The following information must be included with live exit poll reports and election projections:

1) The names of the firm conducting and analysing the exit poll and its sponsor.
2) Whether the sponsor of the exit poll has **any ties to political parties, candidates, political organisations or governmental bodies**.
3) The number of interviews.
4) Whether interviewing was conducted **throughout the election day or for only part of the day**, **if people who have voted before election day were included** and their share of the survey

sample.

5) Which results are based on **parts of the sample**, rather than **the whole sample**.
6) A description of **the precision of the findings**, including estimates of sampling error.
7) **The demographic and behavioural characteristics used for weighting**.
8) General description of the kinds of **variables being used** in any **non-response adjustments**.
9) Weighting variables and approach for all modes and the unweighted distributions for key controls.

In addition, to make available online on the day of election or, if that is not practically possible, no later than 48 hours after the first publication of polling results:

10) The number of polling stations or sampling points and how they were selected.
11) The sampling frame and the sample's geographic dispersion and coverage.
12) Any legal limits on data collection that might affect polling accuracy (e.g., minimum distance of interviewers from the polling station.
13) Whether interviewers are part of a permanent field staff or hired for the occasion.
14) How respondent anonymity is guaranteed (paper questionnaires, etc.).
15) The interview schedule or questionnaire and instructions, indicating any changes in wordings.
16) Response rates (using one of the AAPOR Standard Definitions) and item non-response on vote questions and any known non-response bias.
17) Monitoring and validation procedures (if any).

7.4 Further information to be made available

It must be clear where the enquirer can obtain additional details. The survey company must publish all required full details of public polls on their websites within 48 hours of publication, and the website address provided by the media, or the full details presented on the media's own website.

The survey company and the media must be prepared to supply the technical information necessary to assess the validity of published findings upon reasonable request (see ICC/Esomar Code Article 9a and WAPOR Code Section IV.C). This technical information may include more detailed description of the sampling and general: weighting procedures adopted by the organisation, the weighted and unweighted bases for all demographics and other data that has been published and, when appropriate, the achieved response rates (using one of the definitions in the AAPOR Standard Definitions) and any known non-response bias.

Researchers must be prepared to discuss their research methods in more detail with enquirers upon a reasonable request.

7.4.1 Archives

For reproducibility and secondary data analyses, it is increasingly common for public opinion survey datasets to be lodged with appropriate archives, e.g., the Inter-university Consortium for Political and Social Research (ICPSR), Harvard Dataverse, those listed on the DataCite Commons Repository Finder and the Roper Center for Public Opinion Research. Other examples include Leibniz Institute for the Social Sciences (GESIS), UK Data Service, Consortium of European Social

Science Data Archives (CESSDA) and Korean Social Science Data Archive (KOSSA). Where possible, researchers are encouraged to archive their datasets, after ensuring that all personal data has been deleted from the dataset.

7.5 Secondary reporting

The research organisation normally cannot be held responsible for any secondary reporting or subsequent use made of opinion poll results by people other than the original client (both individuals and media). It must however be ready to immediately issue any necessary comments or information to correct cases of misreporting or misuse of results when these are brought to its attention.

This clause does not apply to independent poll aggregators/forecasters, which carry their own transparency obligations (see 7.6 Aggregators).

7.6 Aggregators

Organisations that aggregate multiple polls (e.g., averages/forecasts) must disclose:

1) Inclusion/exclusion criteria (including any bans and why).
2) Aggregator-added poll weights used in the overall estimate, and the weighting logic.
3) Handling of outliers and house effects.
4) Whether adjustments (e.g., builtin assumptions or historical baselines) are applied.
5) The dates, number of cases and the groups on which estimates are based for polls covered in each aggregation.

Aggregators must align with relevant professional standards on transparency and methodology disclosure.

Addendum

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Why do polls matter?

In short, public opinion polling is a critical part of a functioning democracy.

Opinion polls and surveys are part of the social and political landscape in most of the world. They are conducted routinely in many countries to measure public opinion and attitudes; not only support for political parties and candidates, but also public opinion on a wide range of social and political issues. Poll results are published frequently in print, online and on broadcast media.

Polls transmit citizens' goals, attitudes and desires to governments and political parties. Polls assess the quality of leadership and representation. Polls improve governments' and parties' abilities to represent and serve voters (which may also help them gain popular support and win elections). They also help guide policy by giving decision-makers impartial and unbiased information about what the public wants. Although some opinion polls are commissioned by political groups or individuals to help determine strategy, a great many opinion polls are meant for public consumption.

Properly conducted opinion polls remain the best way of providing the public with a voice in decision-making.

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Contractual agreements

Contracts between research organisations and their clients must define the technical standards necessary for project design and implementation; require legal compliance to all applicable national and local laws and regulations; and ensure adherence to the ICC/Esomar and WAPOR Codes.

While contracts can vary due to legal requirements and project scope, researchers must formalise all methodological and operational details, in collaboration with the client, so project expectations – and the implications of falling short – are clear to all parties.

Researchers must cover the following as applicable:

1) Sample design: Describe the mode of data collection, target population, sampling frame, selection method, interviewer training, field protocols, risk mitigation, quality controls, weighting, and response rate calculations.
2) Questionnaire translation: Specify the translation process, language/dialect requirements, translator qualifications, cultural adaptations, and quality checks.
3) Fieldwork monitoring: Cover questionnaire programming and testing, fieldwork manual preparation, staff training, pilot testing, interview validation, quality thresholds, replacement rules, and fieldwork reporting updates.
4) Respondent anonymity: Ensure interviewer training on assuring confidentiality and legal compliance in protection of all personal data, including audio files and GPS data.
5) Data security: Detail staff training, secure storage, transfer protocols, device/network protection, cross-border compliance, data retention/destruction requirements, and breach procedures.
6) Use of subcontractors: Clearly define roles, responsibilities, and legal obligations of any external partner involved.

7) Project sign-off: Outline approval steps for each phase and how disagreements with clients will be resolved.
8) Contractual guidance: Contracts must bind both sponsor and commissioning body (if different) and grant researchers some control over the publication format, ensuring compliance with the ICC/Esomar and WAPOR Codes.

Certain contracts may also provide that if research findings commissioned for publication are not published, such findings can subsequently (after a specified period of time) be released by the research organisation itself; or alternatively the researcher is free to repeat the survey for another client/research user.

To complement the technical requirements of a contract, informal practices can contribute to successful client relations and project outcomes. Researchers are encouraged to model transparency, respect and accountability in all interactions with clients; offer opportunities for clear, frequent and inclusive communications; and constructively deal with challenges and setbacks with a solution-oriented, collaborative approach based on an honest appraisal of operational constraints, budgetary limitations, potential cost overruns and delays in deliverables.

Important considerations when conducting exit polls

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Exit polls used for projections must be reported as soon as is practical and the law permits after the polls close. Any delay in disseminating the results will raise questions about the legitimacy of the effort, especially with regard to estimating the outcome of the election.

In some countries, election laws prohibit the publication of exit poll data until after the polls have closed. In general, statements about the outcome of an election based on exit polls must not be published before all the polling places in the contest have closed.

In national elections with a range of poll closing times, this can mean exit polls relating to results for elections in smaller voting units (such as individual states in the United States) may be reported when all the polling stations have closed in those locations, rather than waiting until all polling stations used for voting that day have closed. Descriptive information other than voting behaviour may be published before the polls have closed, unless this is prohibited by local legislation or codes of practice.

In addition to the requirements for publication in Section 5 of this Guideline, because of their timing, exit poll results must be released to the public and other interested parties through the general media and simultaneously made accessible to all. It is good practice to disclose as much of the methodology in advance as possible.

Definitions

For the purpose of this Guideline, the following definitions apply:

Duty of care is defined as the obligation requiring adherence to a standard of reasonable care and to act towards others with prudence and vigilance in order to prevent any risk of foreseeable damage.

Exit polls are conducted to measure how people voted and are usually conducted outside polling stations. Those who have voted by mail or in person before election day also need to be interviewed if that group makes up a significant proportion of the voters.

Interview is defined as any form of contact with a respondent in order to collect information for opinion research purposes.

Opinion polls and opinion surveys include the systematic gathering, analysis and interpretation of information about policy, electoral and other preferences and behaviours of individuals or organisations. It uses the statistical and analytical methods and techniques of the applied social, behavioural, statistical, data, and other sciences in order to generate insights and support decision-making.

Non-research activity means taking direct action toward an individual whose personal data was collected or analysed with the intent to change the attitudes, opinions or actions of that individual.

Pre-election polling refers to surveys which include questions about voting intention and are conducted to gauge public opinion and at any point prior to an election and predict the outcome of an election before it takes place.

Privacy notice (sometimes referred to as a privacy policy) means a published summary of an organisation's, or individual operator's, privacy practices describing why and how the organisation or operator gathers, uses, discloses and manages a data subject's (respondent's) personal data.

Researcher is defined as any individual, institute or organisation carrying out, or acting as a consultant on, an opinion poll or research project.

Research client is defined as any individual or organisation that requests, commissions, sponsors or subscribes to all or any part of an opinion poll or research project. This can include a media organisation or a political group, as well as foundations, governments and international organisations who have purchased content on an omnibus survey.

Respondent is defined as any individual or organisation from which information is requested and/or collected for the purposes of an opinion poll or research project.[1]

Scientific poll is defined as a poll using explicit sampling/measurement/disclosure standards sufficient to evaluate quality, accuracy and limitations.

Survey report is defined as the presentation of polling data, either in tabular form or as an analysis, meant for public consumption in news media, online, or in other public distribution.

Synthetic persona means a digital representation of a person generated to mimic the behaviours, preferences and characteristics of real people or groups.[8]

8 Synthetic personas/digital twins are not respondents and must not be treated as such in estimating public opinion.

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