

Public Opinion Polls: Transforming Africa into an Information Based Society

Opinion Polls: Do they Count In Africa?

In many countries around the world, public opinion polls (carried out in many countries world-wide since the 1930's), are an integral part of the social and political landscape. However, until very recently, public opinion polls were rarely carried out in Africa. Today the situation has changed – as important social or political issues emerge pollsters in many African countries will publish opinion poll results saying 71% are for it; 14% are against it and 15% are undecided. With the increase in democracy, governance and public participation across Africa, pollsters expect to see an increase in opinion polls to help guide policy by giving decision makers impartial information about what the public wants. Nevertheless, in spite these positive predications, pollsters concede that there is mixed reaction towards polls – supporters believe that they are a critical force in shaping and transforming society while detractors express the view that they are not beneficial to Africa in any way. The questions we must ask ourselves as researchers - individuals responsible for the collection, analysis and publishing of the views of the public - are therefore “what impact (if any) are public opinion polls having in Africa?” and “Are there strong grounds for continuing the practice of public opinion polling?” To begin to answer these important questions we need to start by understanding the origins and evolution of public opinion polling (with specific reference to Kenya) – from the dark ages to the present day.

Opinion Polling: The Dark Ages

In the history of market research in Kenya, the dark ages refer to the period prior to the new millennium - a period which was characterized by low awareness and lack of appreciation of independent and scientifically conducted research as the basis for sound decision-making. It was apparent that business and policy decisions tended to be driven more by intuition and ‘gut feeling’ than by evidence based, empirical research findings. While it is undoubtedly true that observation, intuition and experience play an important part in the decision-making process at all levels, it also important to note that for businesses - operating in an increasingly competitive and changing economic environment listening to the voice of the consumer plays an increasingly important role. Reliance on predictable cycles and ‘gut feel’ is a short-term strategy. Further, there was still minimal use of research findings in both the public and private sectors – even those who commission research – due to low understanding of research; and difficulty in translating research findings into meaningful and actionable business and policy decisions. A fact of life that we researchers need to address with a matter of urgency.

With limited appreciation and use public opinion polling was virtually unheard of in Kenya. One or two polls were conducted during the ‘dark ages’ but were not published as pollsters were fearful of releasing results which may have been interpreted as critical of the incumbent political regime. As a result, the general population did not have a voice or a channel of engagement with government on the planning or ongoing management of their services. The government, legislators and politicians either assumed or were simply not interested in the general public’s stance and, to a large extent, adopted a dictatorial approach to decision making on issues pertaining to the public welfare. A very dark age indeed.

The Dawn of Opinion Polling

The elections of 2002 marked the end of what was widely considered an intolerant political regime in Kenya. With the dawn of a more democratic regime under the leadership of Kibaki, the sun began to rise and illuminate the landscape for public opinion polling. Thereafter, opinion polls have been conducted on a regular basis with no interference from the government or political leaders. In 2002, at least 4 opinion polls were conducted and widely publicized by the media. Poll results featured as key news items and spawned a new type of interactive programming on radio and television and on electronic media. Without any doubt, the media in Kenya were instrumental in illuminating the path for opinion polls, supporting the regular practice of opinion polling and providing the platforms for the dissemination of poll results.

Since 2002, opinion polls have been regularly conducted amongst two target groups – the general public and business leaders. The general public opinion poll seeks to provide systematic and representative public perceptions on social, economic, economic & cultural (SPEC) issues. These data are then shared with policy-makers, advocacy and interest groups, media practitioners, and groups of citizens to enable them to make more accurate assessments of public opinion. The poll is based on a fully representative sample of randomly selected adults who are interviewed in their homes by fully trained interviewers from all regions of the country. Regular content on these polls include politics, crime, consumer confidence, government performance rating, they have been conducted in Kenya, Uganda and Zambia.

The second opinion poll conducted on a regular basis is The Business Leaders Confidence Index (BLCI) which collects business leaders' perceptions towards the economy. BLCI is conducted bi-annually across five African countries.

Without question in 2002 public opinion surveys came of age and assumed a level of importance and status in Kenya. Not only did they become a familiar and indispensable news item for the media but they also became a key aspect of public debate and scrutiny.

Opinion Polls: A Storm After Dawn ...

Despite a good start in 2002 opinion polling faced a number of challenges between 2003 and 2005. Politicians, journalists and the general public alike did not grasp (perhaps understandably) a number of the key technical issues which determine views as to the accuracy of the results, namely - issues pertaining to sample size (how can 2,000 people accurately represent the views of 16 million adults?), representation (maybe the survey is only carried out in areas favourable to individual political leaders) and the interpretation of data. In instances where the survey data did not support political inclinations, politicians felt that opinion polls were flawed, manipulative exercises - even publicity stunts! Many took every opportunity at public forums to discredit the poll results and the organisations that carry them out. While the media houses continued to publish poll results, very often their interpretations of the data were erroneous – or just down right wrong. Here are some examples. Ignorance often resulted in journalists criticising opinion polls and even going as far as discrediting the pollsters (and therefore by association the whole market research profession).

Pollsters sought to calm the storm through stakeholder engagement and sensitization but this was yielding small returns. Pollsters needed another redemption strategy.

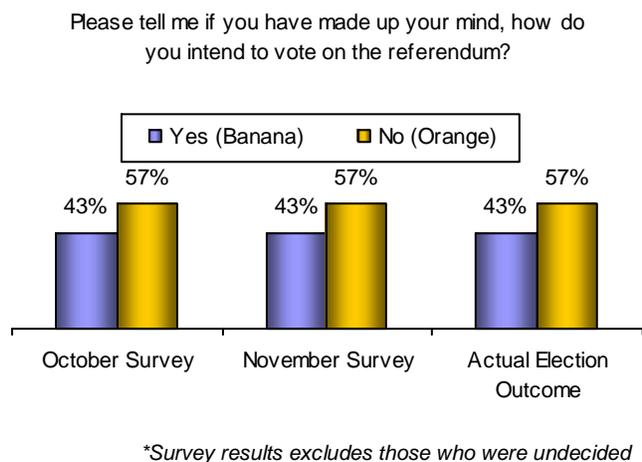
Opinion Polls: The Acid Test

Against the backdrop of criticism, scepticism and lack of confidence, the acid test on polls came with real political events to predict in Kenya and Zambia.

Kenya Referendum Poll

In 2005, Kenyans through a referendum decided whether or not to adopt a new Constitution. “Are you for or against the ratification of the proposed new constitution?” was the question to be answered. Kenyans exercised their democratic rights by choosing between the symbols of a banana or an orange, signifying ‘Yes’ and ‘No’ respectively. President Kibaki was in support of the new constitution while the opposition were against it - mainly because it gave the President more autonomy. Kenya went through a charged pre-election period with violent (and sometimes fatal) confrontation between the proponents and opponents of the draft.

Figure 1: Voting Intentions & Actual Election Outcome

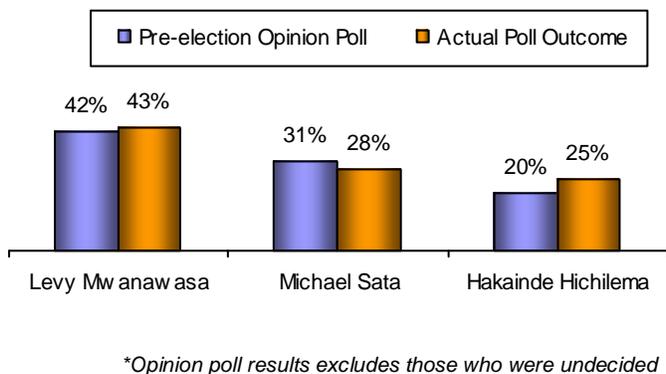


Two opinion polls conducted a month apart (October and November 2005) before the referendum with the last one done four days before the event predicted that the only 43% of the electorate would support the draft constitution. Predictably, these poll results were met with a lot of criticism and doubt especially from the proponents of the draft constitution. However, the outcome of the actual poll was that 43% were in support of the proposed constitution with 57% against – the poll outcome was therefore a mirror of the official results by the Electoral Commission of Kenya! (See chart on the left).

Zambia Presidential Elections

A pre-election poll conducted August 2006 in Zambia showed that the incumbent President Levy Mwanawasa was the most preferred presidential candidate and predicted that he would win the election with 42% of votes. The same opinion poll put Patriotic Front leader Michael Sata in second position with 31% and Hakainde Hichilema third with 20%.

Figure 2: Voting Intentions & Actual Election Outcome



The outcome of the actual poll was that 43% came out in support of Mwanawasa and very close to and within the margin of error to the pre-election opinion poll result (See chart on the left). Given the margin of error of +/-3% the actual results of the other presidential candidates was very close to the survey predictions. Notably, one opposition candidate died a few weeks before election and his supporters probably voted for the opposition; hence the difference between the opinion poll and elections.

Accurate predictions of the Kenyan & Zambian election outcome redeemed the reputation of opinion polling, calmed the storm and served to improve the acceptance levels of opinion polls

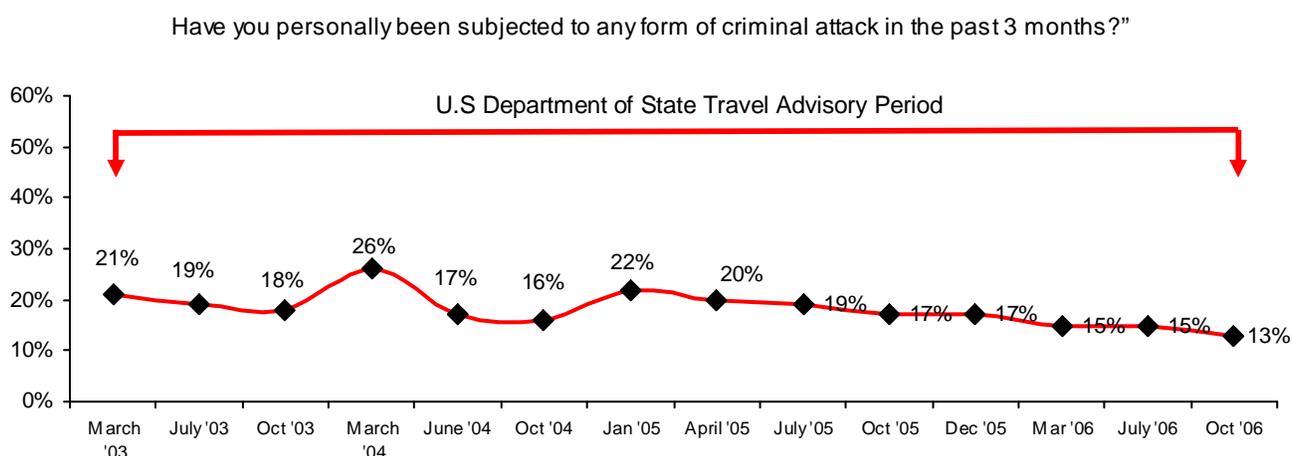
Africa: Is it Slowly Becoming Information Based Society?

In the light of the above, which demonstrated that public opinion polls were accurate and unbiased, Kenya, in particular, had reached a point of no return on polling. Since then, there has been a gradual increase in the use of opinion poll data to inform social, economic and political issues. Slowly but surely the endeavours of researchers and research agencies are developing a culture whereby public policy and commercial decisions are being based on evidence collected through independent survey research. To illustrate this, below are some outputs of opinion poll results and how they have been used by various stakeholders;

Statistics indicating a decline in crime have been used to **promote tourism** in Kenya. The Urban Crime Monitor (UCM) is generated from a public opinion poll which tracks the crime status based on a number of indicators i.e. personal experience with crime, type of crime, time (day or night) of crime, place of crime (home or out of home), level of crime reporting to the police and satisfaction levels with police response. Recently released UCM data indicated that the incidence of being subject to a criminal attack in urban areas had declined from 21% to 13% over the past three years.

Despite this, there remains adverse travel advice from tourists' source markets like the USA which have been in place since 1993. In 2006, The Kenya Tourism Board used the UCM statistics to demonstrate that crime in Kenya had declined as part of its promotional initiatives. Although, it is difficult to measure to what extent these statistics influenced tourists' perceptions towards Kenya, it is significant to note that survey data was used for marketing purposes by a government body

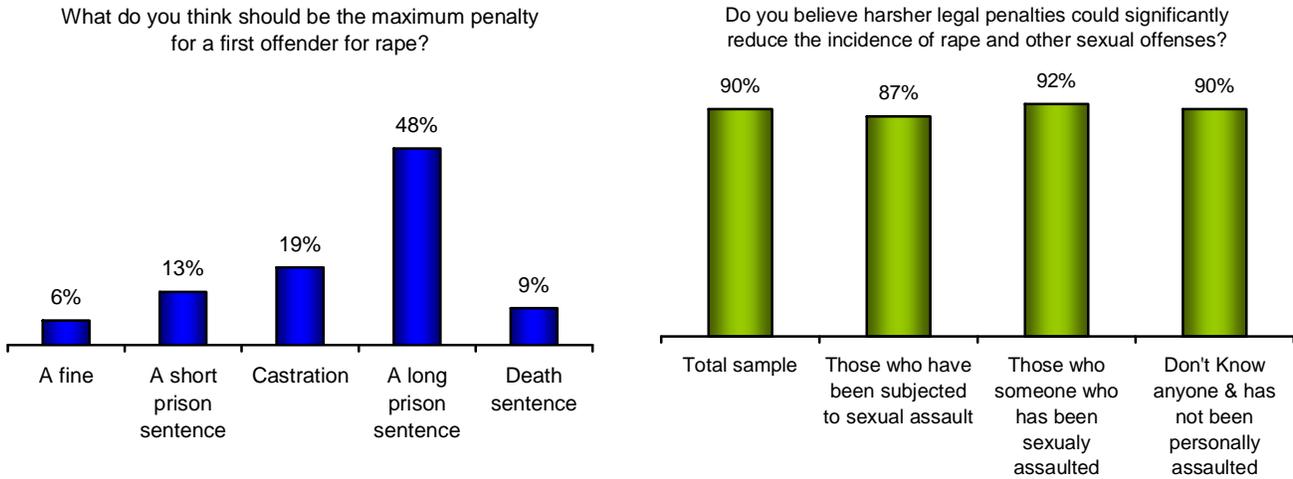
Figure 3: Incidence of Crime



Public opinion poll data has been used in **policy making** in Kenya, most recently for the sexual offences bill. The draft bill sought to enact tougher penalties for sexual offenders - motivated by an increase in the number of rape and under-age defilement cases in the country. Rapists were being sentenced with relatively minor jail terms, which were thought to send the wrong message to potential sexual offenders.

A public opinion poll conducted before the bill was discussed in parliament indicated that 75% of the public wanted tougher penalties for sexual offenders including castration, long prison sentences and the death penalty. Additionally, the majority of respondents felt that harsher penalties would reduce the incidence of rape and other sexual offences. This perception was consistent across all respondents - those who had been subject to sexual assault and those who had not been victims of sexual offences (see charts below). These poll survey findings were shared with the members of parliament and used to lobby support for the bill. The bill was passed with minimal adjustments by parliament.

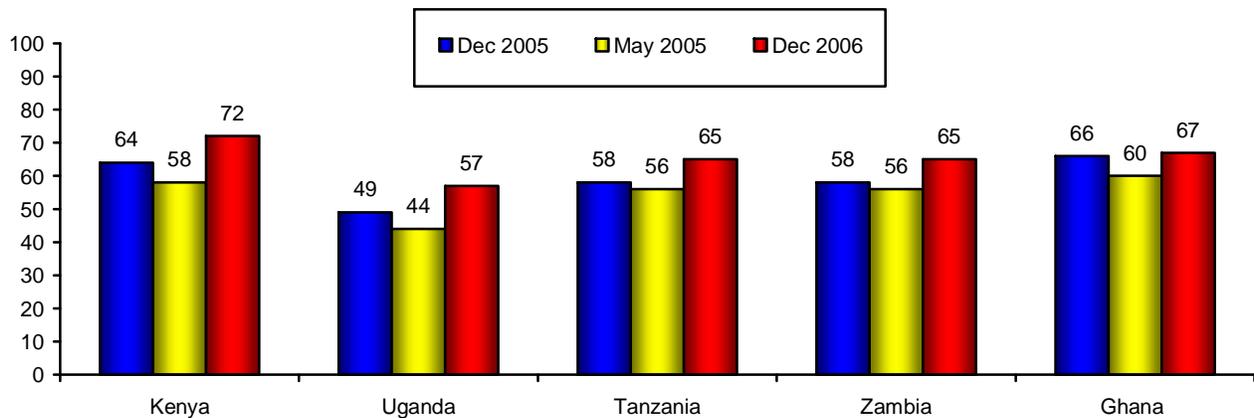
Figure 4: Penalties for Sexual Offenders



Additionally, opinion poll results have been used to **supplement economic indicators** in Uganda, Tanzania, Kenya, Zambia and Ghana. As indicated earlier, the BLCI uses business leaders' expectations of the economy to provide supplementary indicators on economic performance. BLCI is derived from three measures of business confidence - current economic conditions versus 6 months ago, expectations for economy 6 months ahead, expectations on own industry 6 months ahead.

The most recent BLCI shows that Kenya recorded the highest levels of business confidence. Uganda's business confidence (having dropped significantly last year before the general elections) recorded a sharp rise from 44 to 57 points. Tanzania's business confidence, on the other hand, has been on a steady downward trend from 66 points to 59 within the past year. Zambia, with the general elections out of the way, recorded an increase in business confidence of 9 points. (see chart below)

Figure 5: BLCI Comparative Analysis



The Business Leaders Confidence Index provides a sound assessment of the economic direction of the country by businessmen who - for the most part - have had considerable experience 'on the ground'. If they view future economic conditions as being bright, their confidence is high and they are likely to be more willing to spend and invest, which in turn helps to drive the economy. If they are uncertain and gloomy about future prospects, they may hold back, leading to weaker economic performance.

The same opinion poll examined Africa’s partnership with China. Amidst growing concerns about China’s burgeoning influence around the globe, a significant number of Business Leaders in the five countries surveyed indicated that China’s increasing economic activities in ‘natural-resource-rich’ Africa will have a positive impact on their businesses. This view is more widely held by Business Leaders in Uganda and Kenya than in the other three countries. Only 20% of the Business Leaders in the countries surveyed felt that the Chinese venture would have no impact on their businesses while a third of the sample expected China’s strategy to have negative impact on their businesses.

	China’s economic activity impact on business					
	Total	Ghana	Kenya	Tanzania	Uganda	Zambia
Positive Impact	49%	49%	54%	44%	57%	40%
Negative Impact	30%	33%	26%	25%	23%	42%
No Impact	20%	19%	20%	31%	20%	17%

Therefore, BLCI surveys provide invaluable insights and are being quoted widely by policy makers, central bank and the business community. This index is also used by governments at investor briefings to dispel fears of unsteady economies, a characteristic of many African countries.

Opinion polls have transformed **non-conventional users of research such as the religious institutions**. The church reconsidered its engagement in politics as a result of insights derived from opinion polls. Until recently, religious leaders in Kenya were reluctant to make their position publicly known on a number of contentious political issues. However, a public perception survey indicated that a third (36%) of Kenyans were unhappy with religious leaders’ “aloofness” towards politics.

As illustrated below, it was clear that the general public wanted religious leaders to be more active in politics – 52% said they wanted religious leaders to play ‘a larger role’ in politics

Figure 4: Religious Leaders Role in Politics

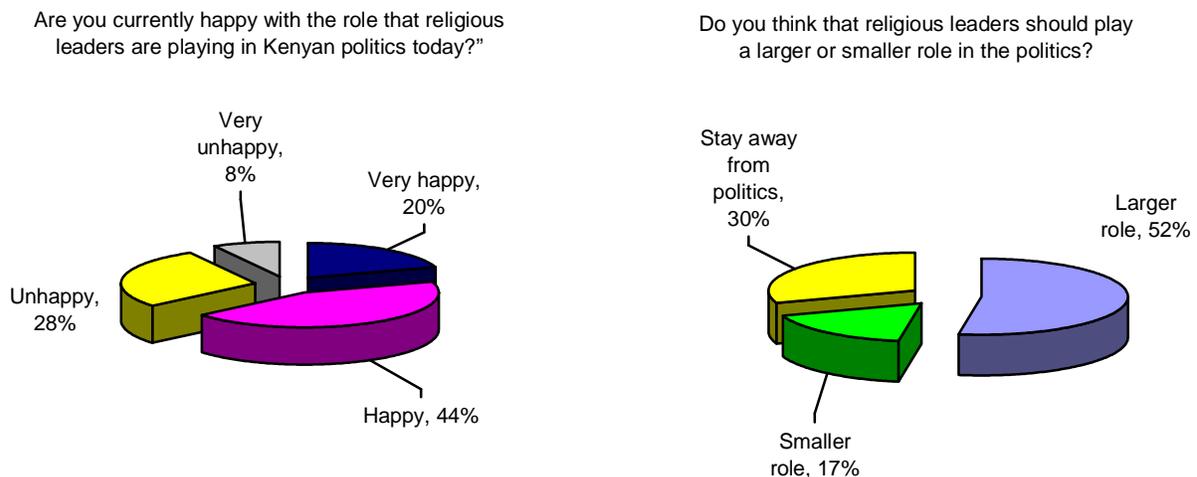
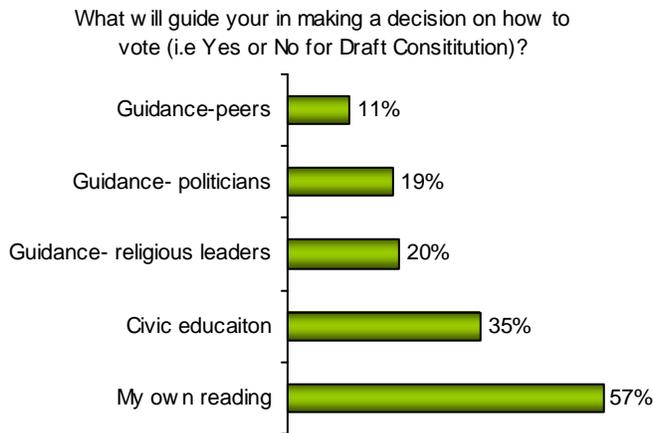


Figure 5: Religious Leaders Role in the Referendum



During the 2005 pre-referendum period in Kenya, a number of religious leaders were reluctant to provide guidance to their congregations on some of the contentious issues in the Draft constitution.

However, a poll conducted just before the Referendum indicated that 20% of Kenyans would make a decision on how to vote based on guidance from religious leaders. These results clearly pointed out the gap that the religious leaders were not filling on behalf of their followers.

Opinion poll data was shared with religious leaders persuaded them to reconsider their views. On sharing these findings with the Anglican Church, a decision was made to re-define their engagement strategy to influence their congregation on the moral aspects of various social and political matters.

Africa: An Information Based Society

If the case of Kenya is anything to go by, then it can be concluded that Africa is slowly awakening to the need and use of survey based research such as opinion polls. Opinion polls are slowly transforming Africa into an information based society, one that is listening to what the public wants and using research based data for decision making. Positive impacts of opinion polls can be seen in many areas;

- **Government:** Although governments have other means of gauging public sentiment - party activists, public servants and their numerous client groups, legislative debates, the print and electronic media - polls are now acknowledged to be one of the most scientific and systematic communication links between governments and the governed. It is certain that governments are now finding polls to be a reliable and useful tool evidenced by their commissioning of a number of public opinion poll surveys in the areas of governance, anti-corruption and politics.
- **Politicians & Public Officials:** Opinion polls have become a familiar and also seemingly indispensable feature of political campaigns. Most political strategists consider them to be indispensable. There have been increased requests for public perception data to inform communication and policy strategies at a local and national level. Through performance score cards, polls are increasingly promoting the public accountability of leaders and civil servants.
- **The Media:** The media have adopted opinion polls to enhance their editorials and promote objectivity in their reporting. In addition, there has been a proliferation of in-house opinion polls through the use of unscientific, self-selected methodologies such as call-ins and short message service (sms) in a bid to keep their audiences engaged.

Opinion polls are now playing a very strong role in diluting the hitherto strong bias by some media houses towards certain social, political and economic issues. Polls have also played a significant role in changing the partial view of media houses on many social issues resulting in more balanced reporting.

- **Policy Makers:** Opinion polls have become an important aspect of public policy-making. Polling today is becoming to the politician and policymaker what the stock market is to the financial analyst. The indices from various opinion polls have received favourable responses from various stakeholders such as the business community, government, NEPAD, African Union, World Economic Forum, and The World Bank. Polls are now being conducted in multiple policy areas that are subject to public debate.
- **The General Public:** Polls have stimulated the general public's interest in political and policy issues and have also played a role in informing more objective public debate on key issues. The general public appreciate and value their new found voice – they need not wait for five years to express their views on social, political and economic issues.

Opinion Polls: Enhancing the Market Research Profession

In addition to all of the above, opinion polls serve to enhance the market research profession. The proven ability of scientifically conducted survey research to produce reliable estimates has resulted in:

- Widespread acceptance that survey based research generates reliable estimates. Against the background of the emerging democracies in Africa and the under utilisation (and scepticism) of survey based research it is reasonable to conclude from the evidence presented in this paper that the regular use of polls and their accuracy have been successfully “mid-wifed” and that the perceived value of using research as a key decision making tool is not ‘still born’.
- Hastening the adoption of survey research by senior executives and policy makers, which will foster social and economic development based on more informed decisions.. The more this happens, the more research will create its rightful contribution to social and economic development.

Opinion polls, scientifically executed to yield reliable estimate on real events like political elections and referendums, will go along way to promote market and social research as a professional discipline and also to give the profession the respect and status it richly deserves. It is incumbent upon us, as professional researchers to take advantage of the new and positive environment for our profession take and demonstrate the value, predictive power and reliability of opinion surveys for the overall benefit of the whole industry.

Despite the impressive gains made by those involved in public opinion poll research since 2000, the key risk factor for the industry remains our challenge to educate our societies – in their ability understand and interpret poll results. There is need to continuously work with politicians, the media and others as how to interpret and present opinion polls with meaning and accuracy. Market researchers also need to engage stakeholders (the general public, policy makers and politicians) and sensitize them on the science behind polls. One possible long strategy could be to lobby for the introduction of market research as a core subject taught in schools. Initiatives such as these will help to mainstream and deepen the use and understanding of market research in Africa.