

BUSINESS AND POLITICS IN THE MUSLIM WORLD

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Introductory Note

This week report consists of 27 surveys. Three of these are multi-country surveys while the rest of 24 are national surveys from various countries.

15428 **Topic** of the week: **USA**-Strengthen Ties with China, But Get Tough on Trade

January 12, 2011

As President Obama prepares to host Chinese President Hu Jintao next week, Americans increasingly see Asia as the region of the world that is most important to the United States.

Nearly half (**47%**) say Asia is most important, compared with just **37%** who say Europe, home to many of America's closest traditional allies.

Views on this issue have changed considerably over the last decade. In an early September 2001 poll, **44%** said our political, economic and military ties to Europe were more important, while **34%** prioritized our ties to Asia. Similarly, in polls conducted in 1993 and 1997 about half felt Europe was region most important to American national interests, while roughly three-in-ten said Asia.

Asia Seen as Increasingly Important; Europe Less So

	Sep 1993	Sep 1997	Sep 2001	Jan 2011
Area most important to U.S.?	%	%	%	%
Asia	31	31	34	47
Europe	50	49	44	37
Equally important	8	6	9	7
Don't know	<u>10</u>	<u>14</u>	<u>13</u>	<u>9</u>
	100	100	100	100

PEW RESEARCH CENTER Jan 5-9, 2011. Q21F2. Figures may not add to 100% because of rounding. In Sept. 2001 and before Asia was read as "Japan and the Pacific rim nations of Asia." In 1993 Europe was read as "the friendly nations of Europe."

ties
the

This shift reflects changing perceptions about the economic balance of power in the world. Almost half (**47%**) of Americans say China is the world's leading economic power, while just **31%** name the U.S. Three years ago -- prior to the global economic crisis -- only **30%** characterized China as the global economic leader, compared with **41%** for the U.S.

The latest national survey by the Pew Research Center for the People & the Press, conducted Jan. 5-9 among 1,503 adults finds that by two-to-one (**60%** to **27%**) Americans see China's economic strength as a greater threat than its military strength. And as Obama goes into talks with the Chinese president, a **53%**-majority say it is very important for the U.S. to

China Policy: Get Tough on Trade, But Also Strengthen Relations



PEW RESEARCH CENTER Jan. 5-9, 2011. Q39a-d.

get tougher with China on trade and economic issues.

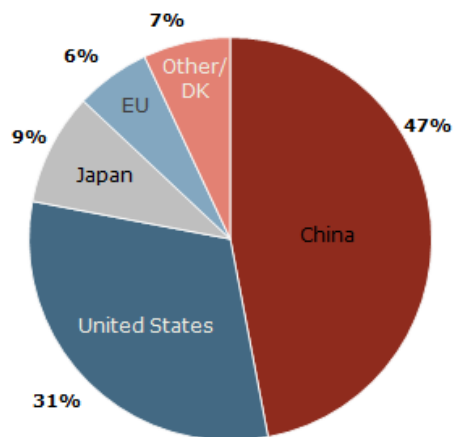
Yet while Americans may see China as a problem, relatively few describe it as an adversary, and a **58%**-majority say it is very important to build a stronger relationship between the U.S. and China. By comparison, promoting human rights and better environmental policies and practices are important, but lower priorities.

While Americans believe China has assumed the leading position in the global economy, they see the military balance of power quite differently. Two-thirds (**67%**) think the U.S. is the world's leading military power. Just **16%** say China has the top military, while **5%** name Russia and **3%** the EU.

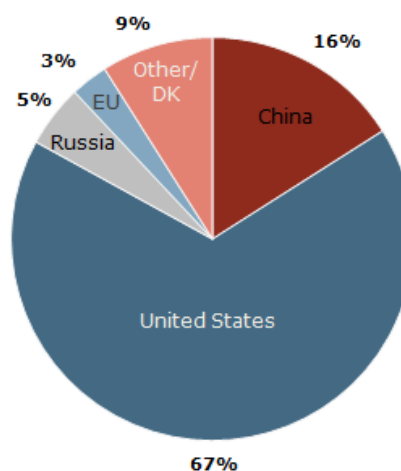
In keeping with this, Americans view China primarily as an economic threat, rather than a military one. When asked whether they are more concerned about China's economic or military strength, more say the former by roughly two-to-one (**60%** vs. **27%**).

China Seen as Leading Economic Power; U.S. as Military Power

World's Leading **ECONOMIC** Power



World's Leading **MILITARY** Power



PEW RESEARCH CENTER Jan 6-9, 2011 omnibus. PEW.12/PEW.13.

One-in-five Americans identify China when asked to name the country representing the greatest threat to the U.S., up from 11% in November 2009. This is the highest percentage volunteering China as the greatest danger since a September 2001 poll taken prior to the 9/11 attacks and just months after the dispute over a U.S. surveillance plane that was held by Chinese authorities for several days on the island of Hainan.

While Americans see China as a rising global power, relatively few characterize the U.S.-China relationship as adversarial. Only **22%** describe China as an adversary, **43%** say it is a serious problem, but not an adversary, and **27%** believe China is not much of a problem. The view that China is not a problem is especially common among young people: **42%** of 18-29 year-olds hold this opinion. Views on this question have been relatively stable since it was first asked in 1997, although the percentage who consider China an adversary has increased somewhat since 2004, when just **14%** saw China this way. §

SOURCE: <http://pewresearch.org/pubs/1855/china-poll-americans-want-closer-ties-but-tougher-trade-policy>

134-25 USA :

AMERICA:

Population: 307,212,123 (July 2010 est.)

GDP per Capita(PPP): \$46,000 (2009 est.)

◆ Britain's American colonies broke with the mother country in 1776 and were recognized as the new nation of the United States of America following the Treaty of Paris in 1783. During the 19th and 20th centuries, 37 new states were added to the original 13 as the nation expanded across the North American continent and acquired a number of overseas possessions. The two most traumatic experiences in the nation's history were the Civil War (1861-65), in which a northern Union of states defeated a secessionist Confederacy of 11 southern slave states, and the Great Depression of the 1930s, an economic downturn during which about a quarter of the labor force lost its jobs. Buoyed by victories in World Wars I and II and the end of the Cold War in 1991, the US remains the world's most powerful nation state. Over a span of more than five decades, the economy has achieved steady growth, low unemployment and inflation, and rapid advances in technology.



Summary of Polls

WEST & CENTRAL ASIA

Majority of Pakistani Aware and Optimistic About Chinese PM Recent Visit

According to a recent survey almost two third of all Pakistanis (63%) are aware of Chinese PM visit to Pakistan and 59% of all believe that it will be beneficial from an economic point of view. 85% consider China and Pakistan 's friendship to be strong. (Gallup Pakistan)

January 13, 2011

Afghans Feel The Country Is Going In The Right Direction

A recent survey shows that Afghans feel that their country is going in the right direction. This figure has kept on increasing ever since 2008. Around four in ten cites improving security conditions as the most important reason for this perception. (Asia Foundation)

November 2010

SOUTH ASIA

Channel Partner's satisfaction goes up in 2010

Toyota continues to lead the satisfaction index in the 2010 TNS DSS study released today. The No. 2 spot was claimed by Hyundai who dramatically improved their ranks over 2008. (TNS Global)

January 11, 2011

SOUTH EAST ASIA

Hunger Rate Slightly Increased In Philippines In The Last Quarter

The Fourth Quarter 2010 Social Weather Survey, fielded over November 27-30, 2010, found the proportion of families experiencing involuntary hunger at least once in the past three months up to 18.1%, or an estimated 3.4 million families. The latest Hunger rate is higher than 15.9% (est. 3.0 million families) in the previous quarter, but lower than the over 20% levels from December 2009 to June 2010. (SWS)

January 03, 2011

WEST EUROPE

Europeans Think That Worse Economic Conditions Are Yet to Come (Multi-country survey)

Europeans think that the economic crisis is not over, and a majority of Europeans continue to believe that the worse is still to come regarding its impact on the job market (48%). However, this feeling has declined significantly since spring 2010. (TNS Opinion & Social)

January 12, 2011

Many EU Residents See Better Times Ahead

Residents in most EU countries surveyed in 2010 expect their lives will be closer to ideal five years from now. On a 0-to-10 scale, with 10 being the best possible life, people in nearly all EU countries -- except Greece, Romania, Luxembourg, and Slovenia -- give their future lives higher average ratings than their present ones. Greeks and Romanians alone predict their lives will be worse in five years; Luxembourgers and Slovenians don't expect their lives to be any different.

January 14, 2011

(EU) Business Leaders Show Overwhelming Support For The Coalition And Cuts

A massive 89 per cent of UK business leaders agree that the Government's policies will improve the state of the British economy according to the 2010 Captains of Industry survey from Ipsos MORI. There is also strong support for the Coalition's cuts programme, with 75 per cent saying that the deficit needs to be cut quickly, which increases to 85 per cent of FTSE 350 respondents. (Ipsos Mori)

January 05, 2011

No Clear Public Support For Minimum Pricing Of Alcohol

According to our latest Scottish Public Opinion Monitor, most Scots (58%) do think there should be an increase in the price of at least some types of alcohol. Around a third (34%) think that the government should put up the price of discounted and low-price alcohol only, while around a quarter (24%) think the government should put up the tax on all alcoholic drinks. Despite this, a sizeable proportion of Scots (38%) think that the government should avoid increasing the price of any alcohol. (Ipsos Mori)

December 31, 2010

A Third of Britons Back Alternative Vote, Just as Many Still Undecided

As Britons begin to ponder their options on a referendum that could change the way lawmakers are elected, the proposal to switch to the alternative vote system is ahead, although a large number of voters remain undecided, a new Vision Critical / Angus Reid poll has found. More than half of respondents say they are “not too informed” or “not informed at all” about the proposed electoral system. (Angus-Reid)

January 12, 2011

Labour Still Leads in Britain, Even if Coalition Partners Run Together

The opposition Labour Party remains ahead of the Conservatives in Britain, while the Liberal Democrats have recovered from their poor showing in December, a new Vision Critical / Angus Reid poll has found. Only a third of people who voted for the Liberal Democrats in 2010 would support the party if it runs in tandem with the Tories. (Angus-Reid)

January 07, 2011

NORTH AMERICA

Americans Want Congress, Obama to Tackle Economic Issues

Americans place the highest priority on domestic issues -- particularly those related to economic matters -- when asked to rate how important each of 15 issues is for the president and Congress to deal with this year. (Gallup USA)

January 14, 2011

Less Than 40% Believe Shootings Will Change Political Tone

A new Zogby International interactive poll of likely voters about the shooting of Rep. Gabrielle Giffords and 19 others in Tucson, AZ found most do not expect it will change political rhetoric and that the shooter was not politically motivated. (Zogby Interactive)

January 15, 2011

Public Opinion Context of Tucson Shootings

The deadly shootings in Tucson, Ariz., on Saturday, resulting in the deaths of six and the wounding of 14 others, including U.S. Rep. Gabrielle Giffords, have raised a number of questions about the context and environment in which these events took place. As the nation waits for more facts to become known about the accused's background and motives, discussion about the case in the media and online has focused largely on Arizona's gun control laws, reports that the accused shooter was a drug user, and the broader divisive political climate in the country. This article reviews public opinion on several aspects of these matters. (Gallup USA)

January 10, 2011

Congress Job Approval Rebounds to 20%

Americans' approval of the job Congress is doing rose in early January to 20%, after falling to a record-low 13% in mid-December and registering 17% in November.

Support for Congress had been at or near 20% from about May of last year through October. (Gallup USA)

January 11, 2011

Very Conservative Americans: Leaders Should Stick to Beliefs

A majority of very conservative Americans believe political leaders in Washington should stick to their beliefs even if little is accomplished, while all other groups, particularly moderates and liberals, are more amenable to compromise for the sake of getting things done. (Gallup USA)

January 12, 2011

Most Doubt Political Rhetoric a Major Factor in Ariz. Shootings

A new *USA Today*/Gallup poll finds Americans dubious that the heated language used in politics today was a major factor that influenced the alleged gunman in last week's shootings in Tucson, Ariz. Twenty percent say such rhetoric was a major factor in the shootings, while 22% cite it as a minor factor; 42% say it was not a factor at all. Democrats are more likely than independents or Republicans to believe political debate played a role. (Gallup USA)

January 12, 2011

Americans' Overall Wellbeing Improves in 2010

Americans' Well-Being Index score improved to an average of 66.8 in 2010 from 65.9 in 2009 and 2008. This year-over-year increase in overall wellbeing reflects increases across five of the six key areas of wellbeing, with the largest gains in how Americans evaluate their lives overall. (Gallup USA)

January 13, 2011

In U.S., Jobs Are Top Problem, While New High Cite Deficit

Americans say unemployment is the No. 1 problem facing the United States at the start of 2011, with 29% naming it. Mentions of "the economy" in general as the leading problem have been trending downward since October, and the current 26% reading is the lowest since May. At the same time, focus on the federal deficit has been edging up, and, although similar to the rate mentioning it last February, the 12% of Americans citing it this month is numerically the highest Gallup has recorded in at least a decade. (Gallup USA)

January 13, 2011

U.S. Satisfaction Remains Near 12-Month Low

Gallup finds 19% of Americans satisfied with the way things are going in the United States at this time -- essentially on par with the lowest level of the past 12 months, 17%, registered in December. (Gallup USA)

January 14, 2011

Views of Gun Control -- A Detailed Demographic Breakdown

In the wake of last weekend's shootings in Tucson, Ariz., the issue of gun control and gun rights has returned to national prominence. The Pew Research Center has tracked attitudes about this issue since 1993. In September, public opinion was divided: 50% said it was more important to control gun ownership while 46% said it was more important to protect the rights of Americans to own guns. (Pew Research Center)

January 13, 2011

Obama Ratings Remain Rock Steady

Neither the trouncing of the Democratic Party in the midterm elections nor the surprising legislative accomplishments of the "lame duck" Congress has had a measurable effect on opinions of Barack Obama. The president's approval ratings have been rock steady since late August and his personal image has changed very little since the middle of last year. (Pew Research Center)

January 13, 2011

Few Americans Blame Political Climate for Arizona Shooting

Many Americans are following news stories related to the shooting that took place in Arizona just a few days ago, and more than half believe that the incident is not related to the current political climate in the United States, a new Vision Critical poll has found. More than a third of respondents expect more events similar to the Arizona shooting to happen in America over the next few months. (Angus-Reid)

January 11, 2011

Conservatives Drop Back, Lead Liberals by Six Points in Canada

The Conservative Party is holding on to the top spot in Canada, but has lost points in the new year, a new Vision Critical / Angus Reid poll has found. Electoral race tightens dramatically in Ontario, with Tories and Grits separated by just two points. (Angus-Reid)

January 12, 2011

Strengthen Ties with China, But Get Tough on Trade

As President Obama prepares to host Chinese President Hu Jintao next week, Americans increasingly see Asia as the region of the world that is most important to the United States. Nearly half (47%) say Asia is most important, compared with just 37% who say Europe, home to many of America's closest traditional allies. (Pew Research Center)

January 12, 2011

Canadians Welcome New Graphic Warnings on Cigarette Packages

Canadians are highly supportive of the inclusion of health warnings on tobacco products, and a majority of respondents believe that the graphic images that were recently unveiled are acceptable, a new Vision Critical / Angus Reid poll has found. Respondents are divided on whether the images will be effective in convincing smokers to quit. (Angus-Reid)

January 10, 2011

AUSTRALASIA

Half of Australians have bought Online

More Australians are choosing to buy online with half of the Australian population 14 years and over (approximately 9.1 million) having ever bought a product or service over the Internet in the 12 months to September 2010. (Roy Morgan Research)

January 14, 2011

CYBERWORLD

Smartphones Gain Traction For Both Businesses And Consumers

TNS BusinessWave confirms that Smartphones are an increasingly important tool for the business market. The advance of new operating systems, capabilities and mobile applications that improve employee productivity, have resulted in steady growth in the market, particularly within the past year. (TNS)

January 10, 2011

WEST AND CENTRAL ASIA

Majority of Pakistani Aware and Optimistic About Chinese PM Recent Visit

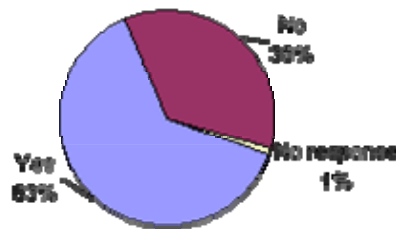
Recent Visit Of Chinese Prime Minister To Pakistan: Majority (63%) Is Aware And Optimistic (59%) About Its Outcome: GILANI POLL/GALLUP PAKISTAN¹

Islamabad, January 13, 2011

According to a Gilani Research Foundation survey carried out by Gallup Pakistan , almost two third of all Pakistanis (63%) are aware of this visit and 59% of all believe that it will be beneficial from an economic point of view. 85% consider China and Pakistan 's friendship to be strong.

In a survey, a nationally representative sample of men and women from across the country were asked the following question: “*Recently Chinese Prime Minister, Wen Jiabao visited Pakistan . Have you read or heard about it?*” Sixty three percent (63%) replied in affirmative as they claimed to be aware about this visit while 36% said they didn't know. 1% gave no response.

“Recently Chinese Prime Minister, Wen Jiabao visited Pakistan . Have you read or heard about it?”



Source: Gallup and Gilani Surveys the Pakistani affiliate of Gallup International Association (www.gallup-international.com; www.gallup.com.pk)

In a follow up question, a nationally representative sample of men and women from across the country were asked the following question: “*Do you think the visit of Chinese Prime Minister will be beneficial or harmful for Pakistan from economic point of view?*” Fifty nine percent (59%) were hopeful that the visit would be beneficial from an economic context, 27% said it would make no difference and 7% said it would be harmful. 7% gave no response.

“Do you think the visit of Chinese Prime Minister will be beneficial or harmful for Pakistan from economic point of view?”

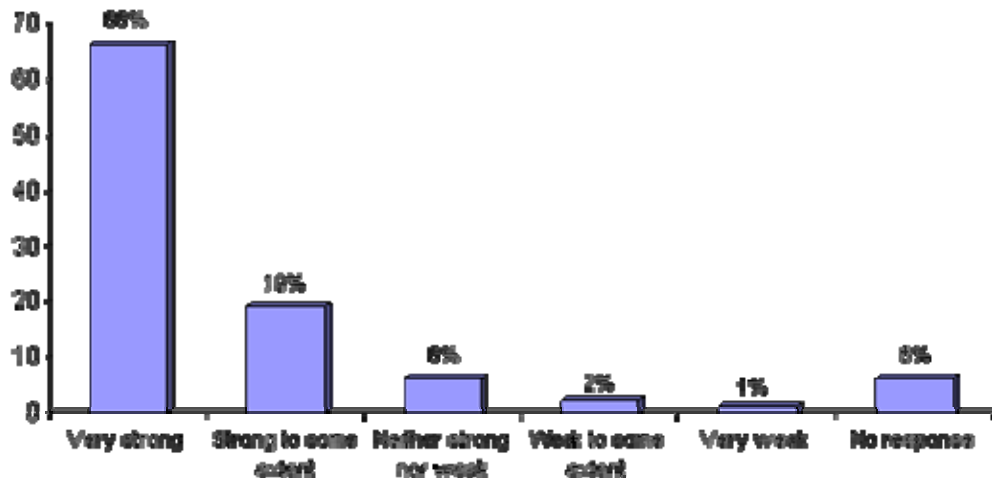
¹ <http://gallup.com.pk/Polls/12-01-11.pdf>



Source: Gallup and Gilani Surveys
 the Pakistani affiliate of Gallup International Association (www.gallup-international.com; www.gallup.com.pk)

In another follow-up question, a nationally representative sample of men and women from across the country were asked the following question: “In your opinion how strong is the friendship of Pakistan and China ?” Eighty five percent (85%) considered Pakistan and China ’s friendship to be strong, 6% said its neither strong nor weak and 3% said its weak. 6% gave no response.

“In your opinion how strong is the friendship of Pakistan and China ?”



Source: Gallup and Gilani Surveys
 the Pakistani affiliate of Gallup International Association (www.gallup-international.com; www.gallup.com.pk)

The study was released by Gilani foundation and carried out by Gallup Pakistan , the Pakistani affiliate of Gallup International. The recent survey was carried out among a sample of 2754 men and women in rural and urban areas of all four provinces of the country, during January 2011. Error margin is estimated to be approximately $\pm 2-3$ per cent at 95% confidence level.

AFGHANISTANI’s Feel The Country Is Going In The Right Direction ²

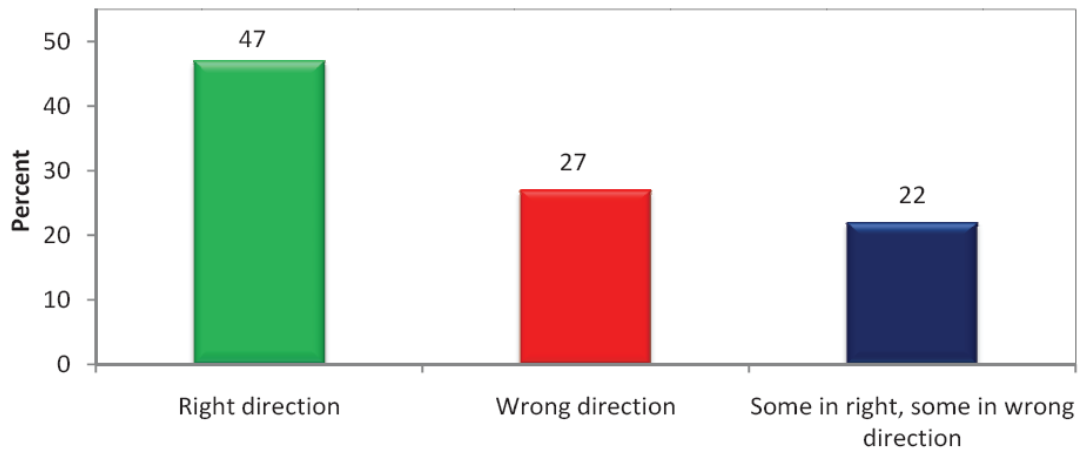
Afghan Centre for Socio-economic and Opinion Research (ACSOR),
Key Findings

² <http://asiafoundation.org/resources/pdfs/Afghanistanin2010survey.pdf>

In 2010, 47% of respondents say that the country is moving in the right direction. This figure has been increasing since 2008 (38%) and 2009 (42%).

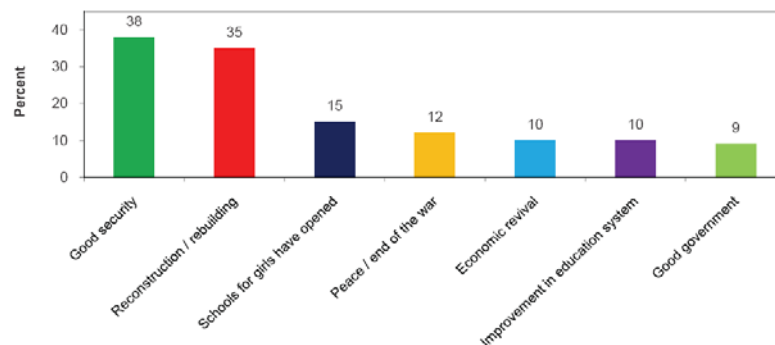
The main reason cited for optimism continues to be the perception of good security, mentioned by 38% of respondents who say the country is moving in the right direction. This number has decreased from 44% in 2009. A little more than a third of respondents in 2010 also cite construction and rebuilding (35%), and opening of schools for girls (15%) remains the third reason for optimism in 2010, although this has decreased from 21% in 2009.

Generally speaking, do you think things in Afghanistan today are going in the right direction, or do you think they are going in the wrong direction? (Q-4, base-6467)



Insecurity also remains the main reason for pessimism, cited by 44% of respondents who say the country is moving in the wrong direction. The proportion of respondents that highlight insecurity in 2010 has increased slightly from 42% in 2009. The proportion of respondents who identify corruption as a reason for pessimism has increased significantly to 27% in 2010 from 17% in 2009. The other main reasons for pessimism identified by respondents include bad government (18%) and unemployment (16%).

Why do you say that things are moving in the right direction? (Q-5a&b combined, Base 3020: Those saying right direction)



Insecurity (including attacks, violence and terrorism) is also identified as the biggest problem in Afghanistan by over a third of respondents (37%), particularly in the South East (51%), West (43%) and South West (42%). Unemployment remains the second biggest problem, mentioned by 28% of respondents. Corruption is identified by 27% of respondents making it the third biggest problem in 2010, and marking a significant increase from 2009 when it was mentioned by 17%. A poor economy (11%), lack of education (11%) and poverty (10%) also continue to be identified amongst Afghanistan's biggest problems.

Unemployment continues to feature amongst the most important problems at both national (28%) and local (26%) levels. Other major problems at the local level concern basic infrastructure and services such as electricity (28%), roads (24%), water (22%) and lack of health care/clinics/hospitals (17%), as in previous years.

Over half of respondents (54%) say they fear for their personal safety in their local area. However, much higher proportions of respondents report at least sometimes fearing for their safety in the West (66%), North East (64%) and South East (61%), than in other parts of the country. There has also been a significant rise in the incidence of crime and violence experienced by respondents in the South East and the North East since 2009.

Seventeen percent of respondents report that they or someone in their family have been victims of violence or crime in the past year. The most common form of crime experienced remains physical attack or beating (35%) followed by racketeering and extortion (12%) and various forms of theft (10%-12%). Nearly one in ten victims of violence report that this was due to the actions of militias and insurgents (9%) and about one in sixteen report that it was due to the actions of foreign forces (6%). Violence resulting from militant/insurgent actions is mentioned most often in the Central/Hazarajat (21%), Central/Kabul (15%), North East (12%), North West (9%), South West (9%), West (9%) and East (8%). Violence due to the actions of foreign forces is most commonly reported in the East (19%) and South West (11%).

Levels of fear to participate in public activities continue to rise over time. Half of respondents (51%) say they would have no fear participating in resolving problems in the community, but this is the only activity in which a majority of people say they can participate without fear. The proportion of respondents who express fear to vote in a national election has risen significantly, from 51% in 2009 to 60% in 2010.

This is now true for the majority of respondents in the South West (83%), South East (78%), East (69%), West (64%) and North East (62%) of the country. Support for the Government's approach for negotiation and reintegration of armed opposition groups is significantly higher in 2010 than in 2009. Eighty three percent of respondents support the government's attempts to address the security situation through negotiation and reconciliation with armed anti-government elements, compared to 71% in 2009. Support is highest in the East (89%), South East (85%) and North West (85%) and lowest in the Central/Hazarajat region (78%). Eighty-one percent agree with the government providing assistance, jobs and housing to those who lay down arms and want to reintegrate into society, compared to 71% in 2009.

Men (88%) are more supportive than women (78%) of this approach. Around three quarters of all respondents (73%) think that the government's reconciliation efforts will help stabilize the country.

The proportion of respondents who say they have some level of sympathy with the motivations of armed opposition groups has fallen from 56% in 2009 to 40% in 2010. However, at least half of respondents say they have some level of sympathy with armed opposition groups in the South West (52%), South East (50%) and West (50%).

In 2010, Afghans give a more optimistic assessment of their economic situation than in 2009. More Afghans say they are better off now than a year ago in all domains, particularly in terms of the financial wellbeing of their household (from 31% in 2009 to 42% in 2010), availability of products in the market (from 19% in 2009 to 27% in 2010), quality of food diet (from 23% in 2009 to 33% in 2010) and employment opportunities (from 11% in 2009 to 17% in 2010).

In terms of local amenities and services, respondents continue to report the greatest satisfaction with the availability of education for children (68%), water for drinking (63%) and the ability to move safely in local areas (63%). Just under half of respondents are satisfied with services related to water for irrigation (49%) and clinics and hospitals (46%). Respondents are least satisfied with the availability of jobs and electricity. Seventy two percent say the availability of jobs in their local area is bad and 66% say the same about the supply of electricity.

More than half (54%) of respondents say they are aware of development projects in their local area relating to education and to the reconstruction/building of roads and bridges. Forty-three percent are aware of projects related to drinking water supply, 39% know of healthcare programs and 28% are aware of programs relating the electricity supply. Varying levels of awareness of development projects across regions suggests that there is a heavier concentration of donor assisted development projects in certain areas of the country, particularly the East, while other regions, especially the Central/Hazarajat and to a lesser extent the North West, are less aware of development assistance.

Satisfaction with the performance of the national government has risen steadily over the last three years (from 67% in 2008 to 71% in 2009 and 73% in 2010). The 2010 survey records the highest levels of positive assessments of national government performance since 2007 in almost all regions. Satisfaction with the performance of central government in policy and service delivery is consistently highest in the East, North West, and Central/Kabul regions. The most commonly mentioned achievements of the current government are a better education system (27%), reconstruction (24%) and establishing peace and security (24%). The most commonly mentioned government failings are administrative corruption (37%), insecurity (30%), lack of job opportunities (17%) and weak government (10%).

In terms of local government, respondents give the most positive assessment of the performance of Provincial Councils (78%), followed by district authorities (61%) and municipalities (53%). However, in 2010 the level of satisfaction with the performance of provincial government rose slightly (from 75% in 2009 to 78%) but fell for district authorities (from 69% in 2009 to 61%) and municipal authorities (from 58% in 2009 to 53%).

The majority of respondents say that corruption is a major problem in all facets of life and at all levels of government. Fifty-five percent say corruption is a major problem in their daily lives, 50% say this about their neighborhood, 56% say corruption is a major problem in local authorities, 65% say this about their provincial government and 76% say corruption is a major problem for the country as a whole. Around half of respondents who had contact with basic public services such as accessing healthcare, applying for jobs, receiving official documents and dealing with the police or the courts encountered some level of corruption.

Confidence in representative bodies remains relatively high. Representative bodies continue to enjoy the confidence of around two thirds of respondents, including community shura and jirga (66%), Provincial Councils (62%), Community Development Councils (CDC) (61%) and Parliament (59%). Sixty-seven percent of respondents say parliament is useful (including 28% who say it is very useful). Sixty four percent say that they are satisfied with their MP representing them in the Parliament.

Nationally 25% of respondents say that people feel safer to express their opinions now than a year ago while 17% say that people feel less safe to do so now, especially in the South West (27%), South East (21%) and Central/Kabul (20%) regions. The major barriers to freedom of expression are identified as fear for personal safety (34%), poor local security conditions (25%), presence of the Taliban (24%) and government restrictions on freedom of political opinion (11%) Eighty-one percent of respondents say they agree with the democratic principle of equal rights for all groups to participation and representation. This figure has remained stable since 2009, but does not reverse the declining trend which has been evident since 2007 (from 90% in 2006 and 2007 to 84% in 2008, 80% in 2009 and 81% in 2010). However, levels of support for allowing peaceful opposition rose significantly in 2010 to 83% after falling consistently from 84% in 2006 to 81% in 2007, 78 in 2008 and 77% in 2009.

Perceptions of elections remain positive in 2010. Around three quarters (74%) of respondents say they think elections have improved the country. However, 2010 sees a significant decline in public confidence in a number of election-related institutions including the Independent Election Commission (from 67% in 2009 to 54% in 2010) and political parties (from 47% in 2009 to 43% in 2010).

The majority of respondents (54%) say that the 2009 Presidential elections were free and fair. However this is lower than the 64% of respondents who in 2009 had said they expected the Presidential elections would be free and fair before the poll was held. Perceptions that the 2009 Presidential elections were not free and fair were highest in the South East (47%), South West (44%), Central/Hazarajat (29%), North West (27%) and East (27%) regions. Respondents who thought the 2009 elections were not free and fair identified a range of problems such as cheating in the vote count (40%) and buying of votes (33%). A small proportion mentioned that men voted in the place of women (7%).

The survey was conducted in June 2010 with the Parliamentary elections scheduled for September. Three months before the elections 78% of respondents were aware of the elections. Awareness of the upcoming parliamentary elections in 2010 was lower than the level of

awareness for the same period regarding the planned presidential elections in 2009 (85%), and significantly lower than the first presidential election in 2004 (91%).

Around three quarters (74%) of respondents said they were likely to vote in upcoming parliamentary elections, including 39% who said this was very likely. These figures are similar to those regarding participation in the presidential and Provincial Council elections in 2009, although in 2009 almost half of respondents (48%) said they were very likely to vote. It would seem however that voting intention reported by survey respondents in 2010 was significantly higher than actual electoral participation which has been estimated at around 40% nationally for the 2010 parliamentary poll.

As in previous years, education and illiteracy (31%) remain the major problems facing women in Afghanistan. Stated support for gender equality remains high, including support for equal educational opportunities for women (87%). However, support for women being allowed to work outside the home continues to fall, from 71% in 2006 to 64% in 2010, which is the lowest level recorded to date.

Radio remains the most accessible media for Afghan households. Eighty-two percent of respondents say they own a functioning radio and there is little difference in radio ownership between urban and rural areas. Other communications technologies such as television, mobile phones and computers are significantly more accessible in urban areas. Just under half (46%) of respondents use radio most often to get news and information, while just over a quarter (28%) use television. Around one in five respondents (19%) depend on friends and family to receive news and information.

Low income households continue to have the lowest levels of access to radio (68%) and television (69%).

2010 saw an increase in mobile telephone ownership compared to previous years. Since 2009 the majority of respondents (59%) now have access to this technology.

SOUTH ASIA

Channel Partner's satisfaction goes up in 2010

*TNS Four Wheeler Dealer Satisfaction Study (DSS)*³

11.01.2011 India

Toyota continues to lead the satisfaction index in the 2010 TNS DSS study released today.

New Delhi/ 11th Jan. 2011: Toyota continues to lead the satisfaction index in the 2010 TNS DSS study released today. The No. 2 spot was claimed by Hyundai who dramatically improved their ranks over 2008.

³ <http://www.tnsglobal.com/news/news-DA7BFC37C184473AB095C1ED05356533.aspx>

The Four Wheeler Dealer Satisfaction Study is an independent study conducted by TNS Automotive, to measure the satisfaction of Passenger Vehicle (Cars, SUVs, MUVs) dealers with their principals. TNS Automotive has been tracking the dealer-principal relationship since 2002, thus providing a close view of the evolving relationship through the years.

“The study helps manufacturers in assessing the strength of their relationship with their primary customers namely Dealers”, says Pradeep Saxena – Executive Director, TNS Automotive. “In the current system of brand exclusive dealerships, it is all the more important for the existing manufacturers to retain their channel partners in their fold, particularly with some of the largest global companies such as Volkswagen and Nissan entering the Indian market”, he adds further.

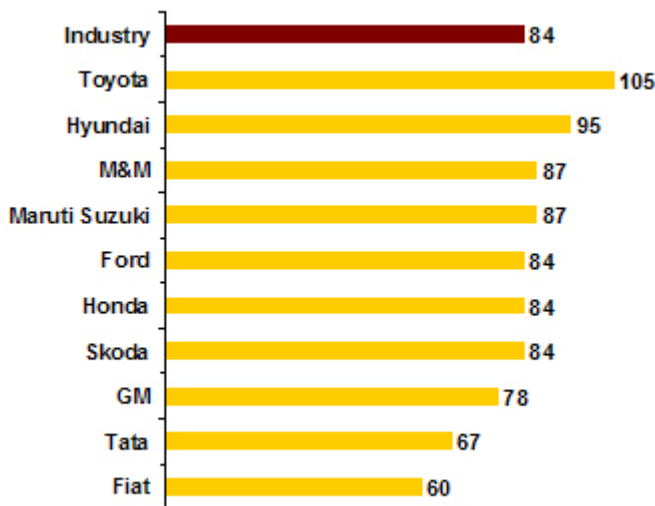
The study goes beyond merely providing the satisfaction scores. It is also designed to provide critical feedback to the industry on dealer expectations from the manufacturers. The 2010 DSS attempts to explain these parameters and shows how they have changed over time.

The 2010 TNS Automotive Syndicated Dealer Satisfaction Study was conducted across India covering a wide spectrum of passenger car dealers of all leading manufacturers. Giving due importance to the market diversity, the study coverage included Tier 2 & 3 towns as well, in addition to metros and Tier 1 towns.

The Dealer Principals were requested to rate the performance of the respective manufacturers on a variety of aspects, related to dealership operations, profitability as also the overall relationship with the manufacturer. The study covered 492 dealers across 76 towns in the country.

In 2010, the industry as a whole witnessed an improved relationship with dealer partners. This is reflected in the relationship level across all manufacturers. The TRI*M score has increased from 74 in 2008 to 84 in the current study.

TRI*M Score- Manufacturers



The study also measures the satisfaction with profitability independently. The overall industry performance (measured through the Profitability Index) has improved significantly- from 66 in 2008 to 78 in 2010. Here also, Toyota and Hyundai are the leading companies.

“The study is a reflection of the changing complexion of the passenger car market”, says Pradeep Saxena. With high growth in domestic demand, the importance of delivery processes and fairness in model allocation has increased sharply, posing operational challenges for the manufacturers. Given the scenario of consistent new product launches, satisfaction with product related aspects is high.

Dealer partners have rated the industry performance poorly on relationship aspects such as willingness to solve their problems and taking their suggestions on-board. Another such aspect is fairness in network planning.

One more focus area for the industry is After Sales Service. Dealer Partners have consistently voiced their concerns on availability of spare parts as also service promotions. They also seek a greater support in handling complaints related to OEM fitted items.

About TNS Automotive

TNS Automotive is the leading global provider of market research and insights to the automotive industry, with a specialist network of over 350 dedicated researchers in over 50 countries. We address the complex research needs of clients including major global automotive and tyre manufacturers, component suppliers, oil companies, repair specialists, parts distributors, dealerships and advertising agencies. We have a proven capability and tested tools to cater to any product life stage or business problem: Whether our clients are developing new products, optimizing advertising and media expenditures, assessing their business relationships, seeking to discover new segments or sharpen / redefine their brand positioning. We help our clients drive better business with innovative insights. www.tnsglobal.com/automotive

About TNS

TNS is the global leader in custom market research delivering actionable insights and research-based business advice to clients around the globe so they can make more effective business decisions. TNS offers comprehensive industry knowledge within the Consumer, Technology, Finance, Automotive and Political & Social sectors, supported by a unique product offering that stretches across the entire range of marketing and business issues, specializing in product development & innovation, brand & communication, stakeholder management, retail & shopper, and qualitative research. Delivering best-in-class service across more than 80 countries, TNS is dedicated to discovering growth opportunities for its clients in an ever-changing world. Through its pioneering and innovative culture, TNS understands the latest marketing challenges and research techniques, being the first to discover and solve new marketing issues for clients.

DISCOVER – A changing world: New territories, new media, new opportunities.

TNS is part of Kantar, one of the world's largest insight, information and consultancy networks.

Please visit www.tnsglobal.com for more information.

About Kantar

Kantar is one of the world's largest insight, information and consultancy networks. By uniting the diverse talents of its 13 specialist companies, the group aims to become the pre-eminent provider of compelling and inspirational insights for the global business community. Its 26,500 employees work across 95 countries and across the whole spectrum of research and consultancy disciplines, enabling the group to offer clients business insights at each and every point of the

consumer cycle. The group's services are employed by over half of the Fortune Top 500 companies.

SOUTH EAST ASIA

13.4.4 Hunger Rate Slightly Increased In Philippines in The Last Quarter⁴

Fourth Quarter 2010 Social Weather Survey:

Hunger up to 18.1% of families;

49% rate themselves as Mahirap or Poor

3 January 2011

Social Weather Stations

The Fourth Quarter 2010 Social Weather Survey, fielded over November 27-30, 2010, found the proportion of families experiencing involuntary hunger at least once in the past three months up to 18.1%, or an estimated 3.4 million families.

The latest Hunger rate is higher than 15.9% (est. 3.0 million families) in the previous quarter, but lower than the over 20% levels from December 2009 to June 2010. It is one point below the one-year average of 19.1%, but over 4 points above the 12-year average of 13.7% [*Chart 1, Table 1*].

The measure of Hunger refers to involuntary suffering because the respondents answer a survey question that specifies hunger due to lack of anything to eat.

The November 2010 survey also found that 49% (estimated 9.2 million) families consider themselves as *Mahirapor* Poor, hardly changing from 48% in September 2010 [*Chart 2, Table 2*], and 36% (estimated 6.7 million) consider themselves as Food-Poor, 2 points down from 38% in the previous quarter [*Chart 3, Table 3*].

Severe Hunger at 3.1%, Moderate Hunger at 15.0%

The 2-point increase in Overall Hunger between September and November 2010 resulted from a 2-point increase in Moderate Hunger, combined with an unchanged Severe Hunger rate.

Moderate Hunger, referring to those who experienced it "Only Once" or "A Few Times" in the last three months, rose by over 2 points from 12.9% (est. 2.4 million families) in September to 15.0% (est. 2.8 million families) in November. The few who did not state their frequency of Hunger were also placed in this category.

Severe Hunger, referring to those who experienced it "Often" or "Always" in the last three months, stayed at 3.1% (est. 588,000 families) from September to November.

Hunger rose in all areas except Visayas

⁴ <http://www.sws.org.ph/>

Overall Hunger rose by almost 4 points in Balance Luzon, from 14.7% (est. 1.2 million families) in September to 18.3% (est. 1.5 million families) in November, by almost 2 points in Mindanao, from 16.3% (est. 700,000 families) to 18.0% (est. 770,000 families), and by over one point in Metro Manila, from 20.3% (est. 507,000 families) to 21.7%.

It stayed at 15.3% (est. 580,000 families) in the Visayas [*Chart 4, Table 4*].

Moderate Hunger rose by almost 3 points in Mindanao, from 13.3% in September to 16.0% in November, by over 2 points in Balance Luzon, from 12.3% to 14.7%, by 2 points in Metro Manila, from 15.7% to 17.7%, and by 1 point in the Visayas, from 11.7% to 12.7% [*Charts 5 to 8, Tables 5 to 8*].

The latest Moderate Hunger rates are still higher than their 12-year averages for all areas.

Severe Hunger rose by over one point in Balance Luzon, from 2.3% in September to 3.7% in November.

It declined by 1 point in Mindanao, from 3.0% to 2.0%, by one point in the Visayas, from 3.7% to 2.7%, and by almost one point in Metro Manila, from 4.7% to 4.0%.

The latest Severe Hunger rates are higher than their 12-year averages in Metro Manila and Balance Luzon, and lower in Mindanao and the Visayas.

Self-rated Poverty and Food Poverty

Self-Rated Poverty fell by 9 points in Mindanao, from 53% in September to 44% in November, by 8 points in the Visayas, from 61% to 53%, and by 5 points in Metro Manila, from 49% to 44%.

It rose by 11 points in Balance Luzon, from 40% to 51% [*Chart 9, Table 9*].

It declined by one point in urban areas, from 43% to 42%, and stayed at 55% in rural areas [*Chart 10, Table 10*].

Self-Rated Food Poverty declined by 13 points in Metro Manila, from 41% in September to 28% in November, by 11 points in the Visayas, from 50% to 39%, and by 2 points in Mindanao, from 36% to 34%.

It rose by 6 points in Balance Luzon, from 32% to 38% [*Chart 11, Table 11*].

Poverty thresholds still sluggish everywhere

The Self-Rated Poverty Threshold, or the monthly budget that poor households need in order not to consider themselves poor in general, remain sluggish for several years despite considerable inflation. This indicates that poor families have been lowering their living standards, i.e., belt-tightening.

As of November 2010, the median poverty threshold for poor households is P15,000 in Metro Manila, P9,000 in Balance Luzon, P8,000 in the Visayas, and P5,000 in Mindanao. These amounts have already been surpassed in the past in those areas [*Chart 12, Table 12*].

The median food-poverty threshold for poor households in Metro Manila is P9,000, the highest for this area since SWS began surveying it in September 1996. The previous record-high was P8,000 in March 2004. The median food-poverty threshold is P4,000 in Balance Luzon, P4,000 in the Visayas, and P3,000 in Mindanao. These amounts had already been surpassed several years ago [*Chart 13, Table 13*].

Measurement of belt-tightening

In Metro Manila in particular, the median poverty threshold of P15,000 is barely above P10,000 as in 2000, even though the Consumer Price Index (CPI) has risen there by over 60% since.

The NCR median poverty threshold of P15,000 per month for November 2010 is equivalent to only P 9,096 in base year 2000 purchasing power, after deflation by the CPI. The deflated poverty threshold for NCR of below P10,000 per month is a throwback to living standards of almost fifteen years ago [*Chart 14, Table 14*].

In four SWS surveys in 2000, the base year of the CPI, the median SWS poverty threshold for NCR was already P10,000 per month, equivalent to P16,490 per month at the November 2010 cost of living, given the CPI of 164.9. The difference of P16,490 - P15,000 = P1,490 between the thresholds of 2000 and November 2010 measures the extent of belt-tightening that took place.

On the other hand, median food poverty threshold of P9,000 in Metro Manila is equivalent to only P5,729 in base year 2000 purchasing power for food [*Chart 15, Table 15*].

The median food poverty threshold in December 2000 was P6,000 for Metro Manila. It is equivalent to P9,426 per month at the November 2010 cost of food, given the CPI of 157.1 for food items. The difference of P9,426 - P9,000 = P426 between the food thresholds of 2000 and November 2010 is the extent of belt-tightening made by food-poor Metro Manila households.

Survey Background

The November 2010 Social Weather Survey was conducted from November 27-30, 2010 using face-to-face interviews of 1,200 adults in Metro Manila, the Balance of Luzon, Visayas, and Mindanao (sampling error margins of $\pm 3\%$ for national percentages, $\pm 6\%$ for area percentages).

The area estimates were weighted by National Statistics Office medium-population projections for 2010 to obtain the national estimates.

The SWS survey questions about the family's experience of hunger, self-rated poverty, and self-rated food-poverty are directed to the household head. These items are non-commissioned, and

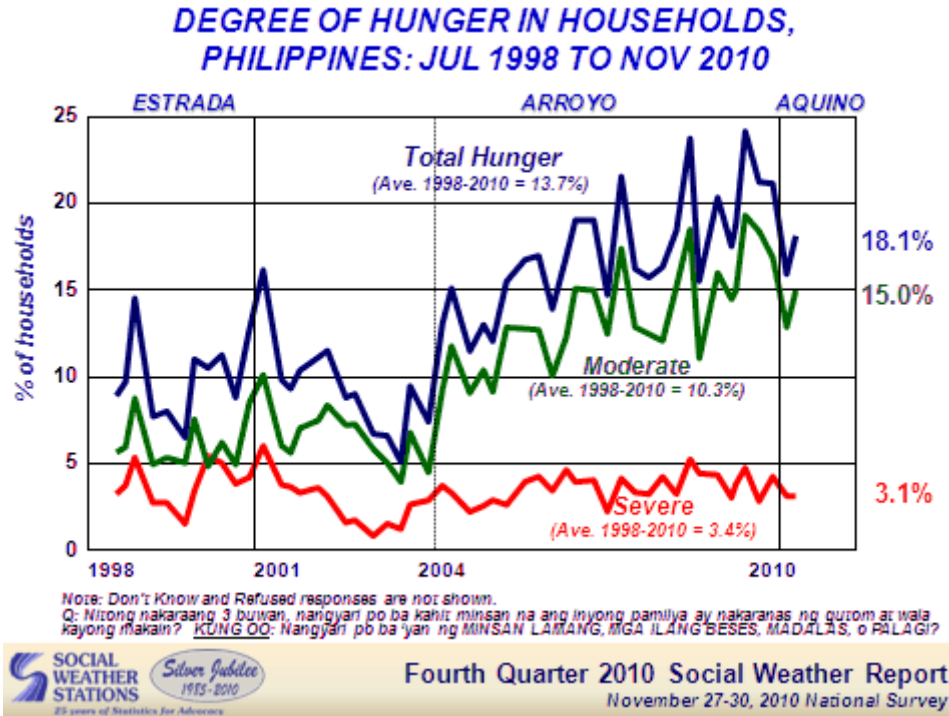
are always included on SWS's own initiative and released as a public service, with first printing rights assigned to *BusinessWorld*.

SWS employs its own staff for questionnaire design, sampling, fieldwork, data-processing, and analysis, and does not outsource any of its survey operations.

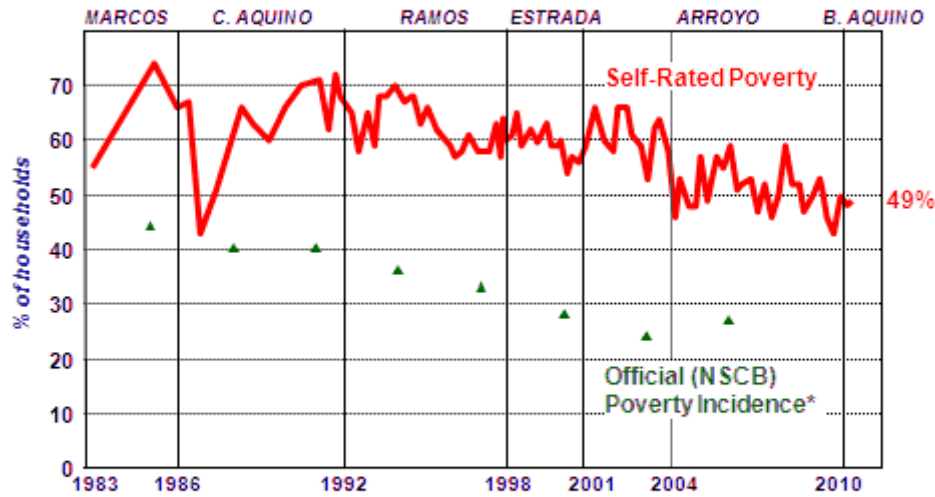
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Chart

I



SELF-RATED POVERTY: HOUSEHOLDS WHO ARE "MAHIRAP": PHILIPPINES, APR 1983 TO NOV 2010



Self-Rated Poverty Question: Where would you place your family in this card? (Not poor, On the line, Poor)
 *Note: The NSCB figures, which compare income of the year to the official poverty line, are plotted in June of the year.



Fourth Quarter 2010 Social Weather Report
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SELF-RATED POVERTY: HOUSEHOLDS WHO ARE "MAHIRAP": PHILIPPINES

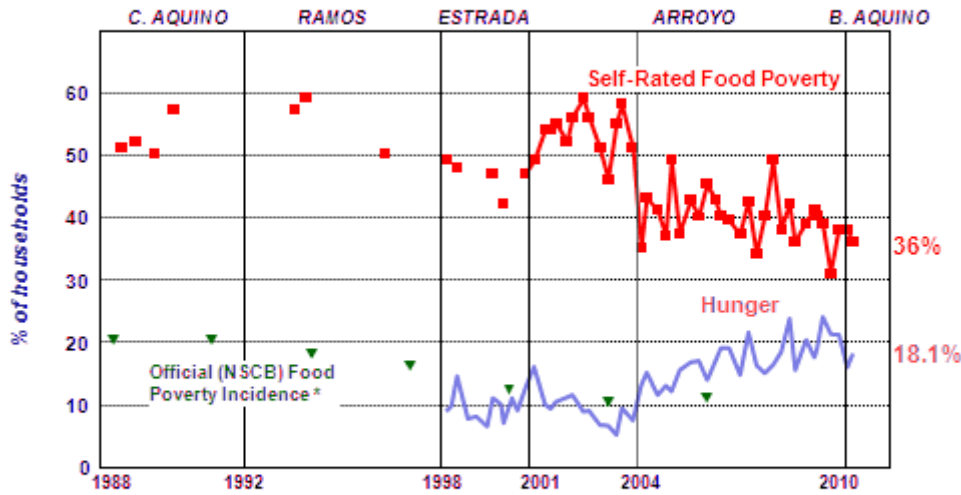
Official S.R.P. Poverty*	Official S.R.P. Poverty*	Official S.R.P. Poverty*	Official S.R.P. Poverty*	Official S.R.P. Poverty*
MARCOS				
APR 83	55%			
JUN 85	44%			
JUL 85	74			
Ave. 85	85			
CORYAQUINO				
MAY 86	66			
OCT 86	67			
Ave. 86	87			
MAR 87	43			
OCT 87	51			
Ave. 87	47			
JUN 88	40			
SEP 88	66			
Ave. 88	88			
FEB 89	63			
SEP 89	60			
Ave. 89	82			
APR 90	66			
NOV 90	70			
Ave. 90	88			
JUN 91	40			
JUL 91	71			
NOV 91	62			
Ave. 91	87			
FEB 92	72			
APR 92	68			
RAMOS				
SEP 92	65%			
DEC 92	58			
Ave. 92	88			
APR 93	65			
JUL 93	59			
SEP 93	68			
DEC 93	68			
Ave. 93	85			
APR 94	70			
JUN 94	36%			
AUG 94	67			
NOV 94	68			
DEC 94	68			
Ave. 94	88			
MAR 95	63			
JUN 95	66			
OCT 95	62			
DEC 95	61			
Ave. 95	83			
APR 96	59			
JUN 96	57			
SEP 96	58			
DEC 96	61			
Ave. 96	59			
APR 97	58			
JUN 97	58	33		
SEP 97	58			
RAMOS (cont)				
DEC 97	63%			
Ave. 97	59			
FEB 98	57			
MAR 98	64			
APR 98	60			
ESTRADA				
JUL 98	61			
SEP 98	65			
NOV 98	59			
Ave. 98	81			
MAR 99	62			
JUN 99	60			
OCT 99	63			
DEC 99	56			
Ave. 99	81			
MAR 00	56			
APR 00	60			
JUN 00	28%			
JUL 00	54			
SEP 00	57			
DEC 00	56			
Ave. 00	57			
ARROYO				
MAR 01	59			
JUL 01	66			
SEP 01	63			
ARROYO (cont)				
NOV 01	60%			
Ave. 01	82			
MAR 02	58			
MAY 02	66			
SEP 02	66			
NOV 02	61			
Ave. 02	83			
MAR 03	59			
JUN 03	53	24%		
SEP 03	62			
NOV 03	64			
Ave. 03	80			
MAR 04	58			
JUN 04	46			
AUG 04	53			
DEC 04	48			
Ave. 04	51			
MAR 05	48			
MAY 05	57			
AUG 05	49			
DEC 05	57			
Ave. 05	53			
MAR 06	55			
JUN 06	59	27		
SEP 06	51			
NOV 06	52			
Ave. 06	54			
ARROYO (cont)				
FEB 07	53%			
JUN 07	47			
SEP 07	52			
DEC 07	46			
Ave. 07	50			
MAR 08	50			
JUN 08	59			
SEP 08	52			
DEC 08	52			
Ave. 08	53			
FEB 09	47			
JUN 09	50			
SEP 09	53			
OCT 09	51			
DEC 09	46			
Ave. 09	49			
MAR 10	43			
JUN 10	50			
BENIGNO AQUINO III				
SEP 10	48			
NOV 10	45			
Ave. 10	48			

* Note: The NSCB figures, which compare income of the year to the official poverty line, are plotted in June of the year.
 Sources: Social Weather Stations; NSCB Official Poverty Incidence based on Family Income and Expenditure Surveys; BBC; DAP.



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SELF-RATED FOOD POVERTY AND HOUSEHOLDS WHO EXPERIENCED HUNGER: TOTAL HOUSEHOLDS, SEP 1988 TO NOV 2010

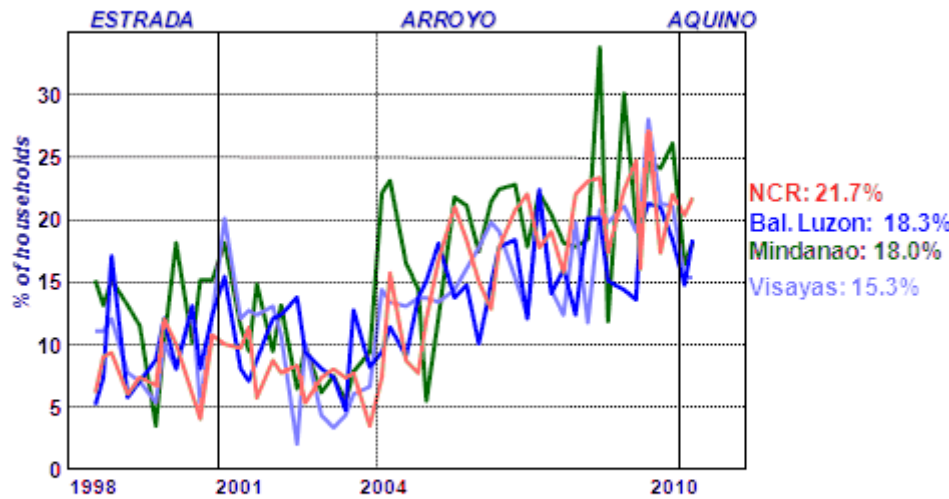


Food Poverty Question: Based on the type of food eaten by your family, where would you place your family on this card? (Not poor, On the line, Poor)
Hunger Question: In the last three months, did it happen even once that your family experienced hunger and not have anything to eat? (Yes, No)
 *Note: The NSCB figures, which compare income of the year to the official food poverty line, are plotted in June of the year.



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INCIDENCE OF HUNGER IN HOUSEHOLDS, BY LOCATION: JUL 1998 TO NOV 2010

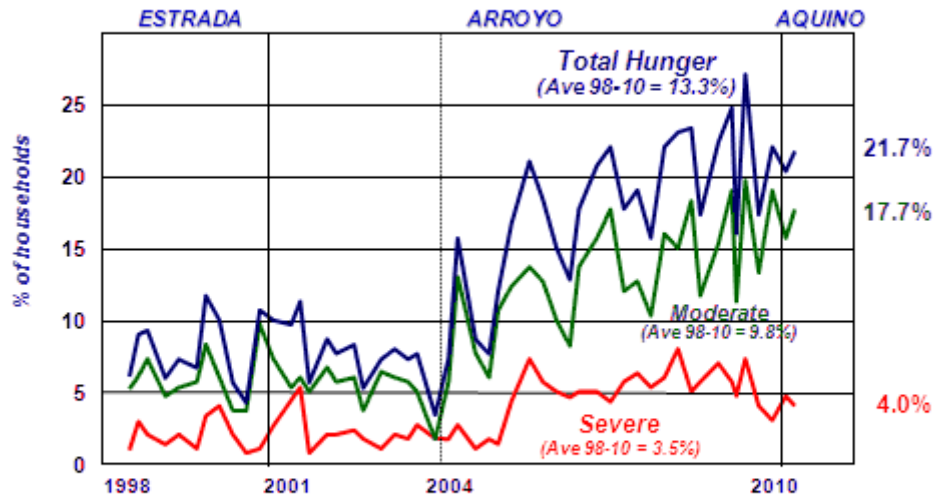


Note: Don't Know and Refused responses are not shown.
 Q: Nitzong nakaraanang 3 buwan, nangyari po ba kahit minsan na ang inyong pamilya ay nakaranas ng gutom at wala kayong makain? KUNG OO- Nangyari po ba yan ng MINSAN LAMANG, MGA ILANG BESES, MADALAS, o PALAGI?



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**DEGREE OF HUNGER IN HOUSEHOLDS,
NATIONAL CAPITAL REGION: JUL 1998 TO NOV 2010**

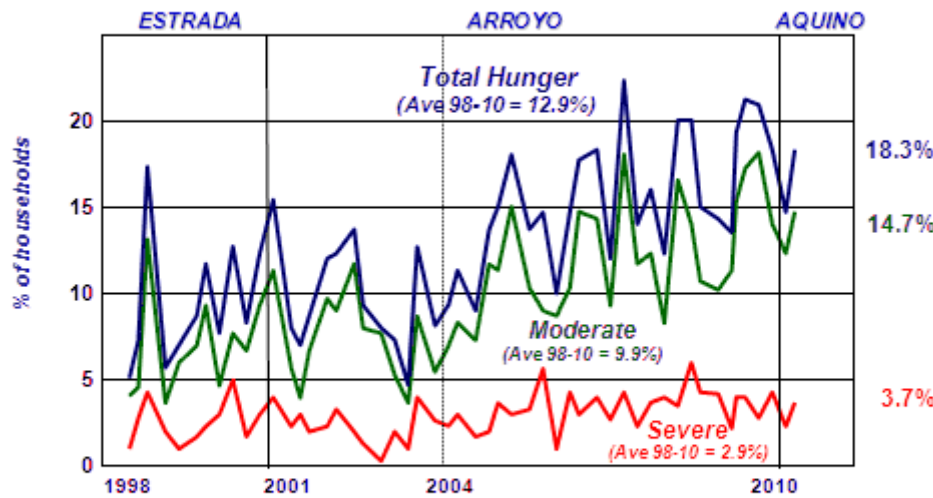


Note: Don't Know and Refused responses are not shown.
Q: Nilong nakaraang 3 buwan, nangyari po ba kahit minsan na ang inyong pamilya ay nakaranas ng gutom at wala kayong makain? **KUNG OO:** Nangyari po ba 'yan ng MINSAN LAMANG, MGA ILANG BESES, MADALAS, o PALAGI?



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November 27-30, 2010 National Survey

**DEGREE OF HUNGER IN HOUSEHOLDS,
BALANCE LUZON: JUL 1998 TO NOV 2010**

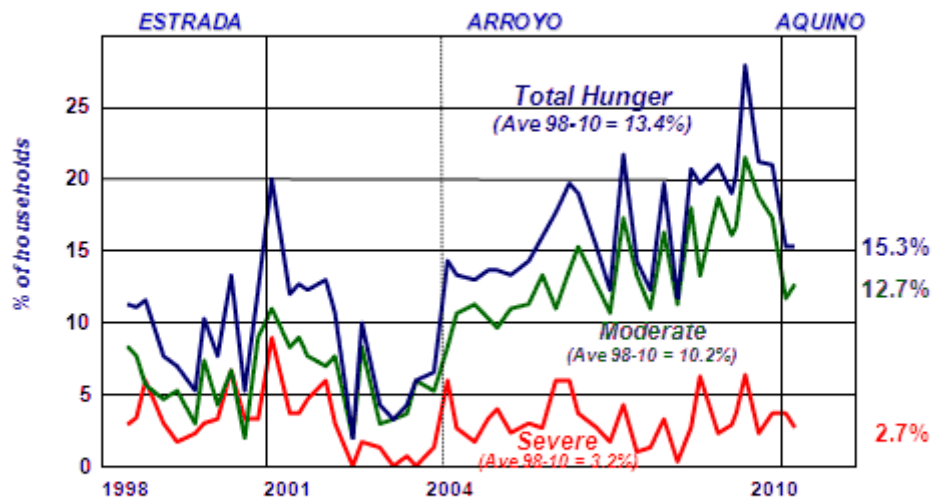


Note: Don't Know and Refused responses are not shown.
Q: Nilong nakaraang 3 buwan, nangyari po ba kahit minsan na ang inyong pamilya ay nakaranas ng gutom at wala kayong makain? **KUNG OO:** Nangyari po ba 'yan ng MINSAN LAMANG, MGA ILANG BESES, MADALAS, o PALAGI?



Fourth Quarter 2010 Social Weather Report
November 27-30, 2010 National Survey

DEGREE OF HUNGER IN HOUSEHOLDS, VISAYAS: JUL 1998 TO NOV 2010

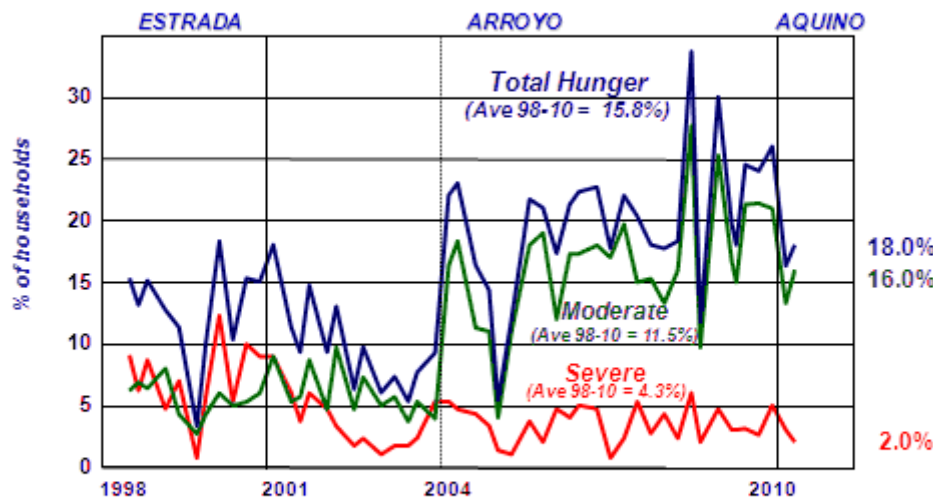


Note: Don't Know and Refused responses are not shown.
Q: Nilong nakaraang 3 buwan, nangyari po ba kahit minsan na ang inyong pamilya ay nakaranas ng gutom at wala kayong makain? KUNG OO: Nangyari po ba yan ng MINSAN LAMANG, MGA ILANG BESES, MADALAS, o PALAGI?



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DEGREE OF HUNGER IN HOUSEHOLDS, MINDANAO: JUL 1998 TO NOV 2010

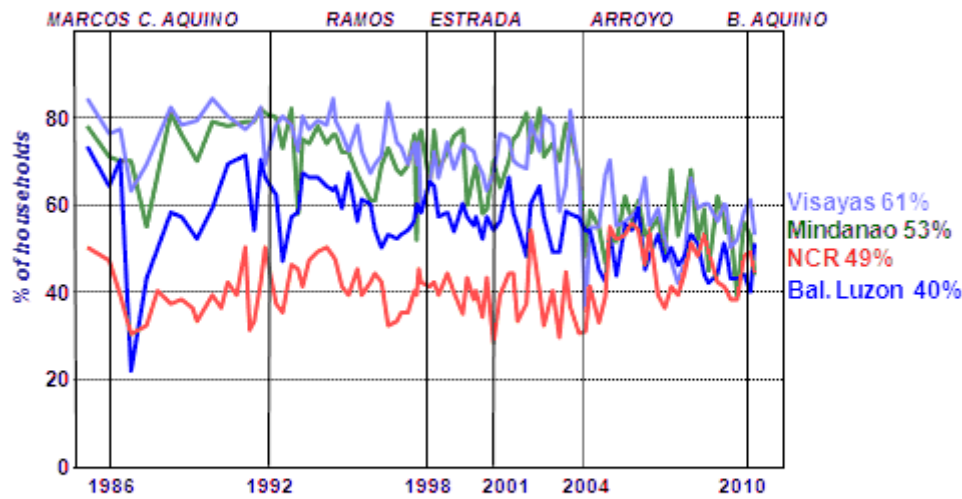


Note: Don't Know and Refused responses are not shown.
Q: Nilong nakaraang 3 buwan, nangyari po ba kahit minsan na ang inyong pamilya ay nakaranas ng gutom at wala kayong makain? KUNG OO: Nangyari po ba yan ng MINSAN LAMANG, MGA ILANG BESES, MADALAS, o PALAGI?



Fourth Quarter 2010 Social Weather Report
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SELF-RATED POVERTY: HOUSEHOLDS WHO ARE "MAHIRAP", BY LOCATION, JUL 1985 TO NOV 2010

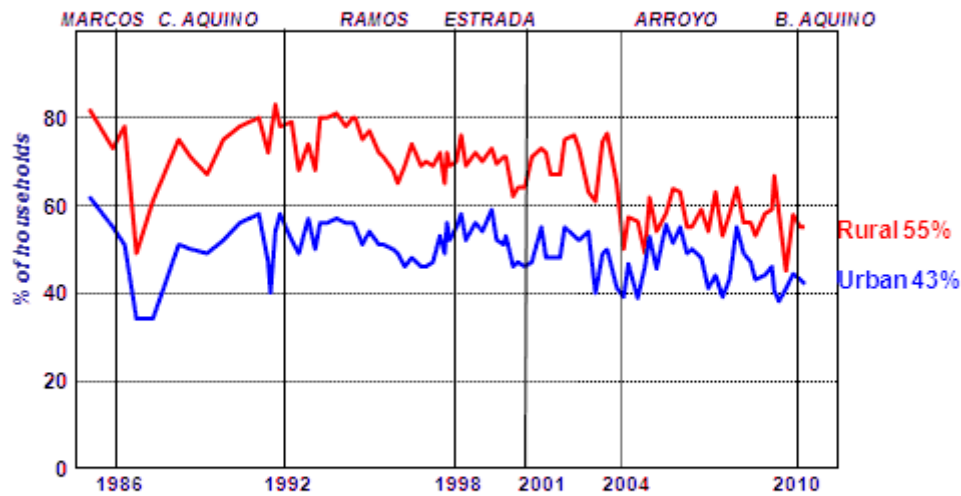


Self-Rated Poverty Question: Where would you place your family in this card? (Not poor, On the line, Poor)



Fourth Quarter 2010 Social Weather Report
November 27-30, 2010 National Survey

SELF-RATED POVERTY: HOUSEHOLDS WHO ARE "MAHIRAP", BY LOCALE, JUL 1985 TO NOV 2010

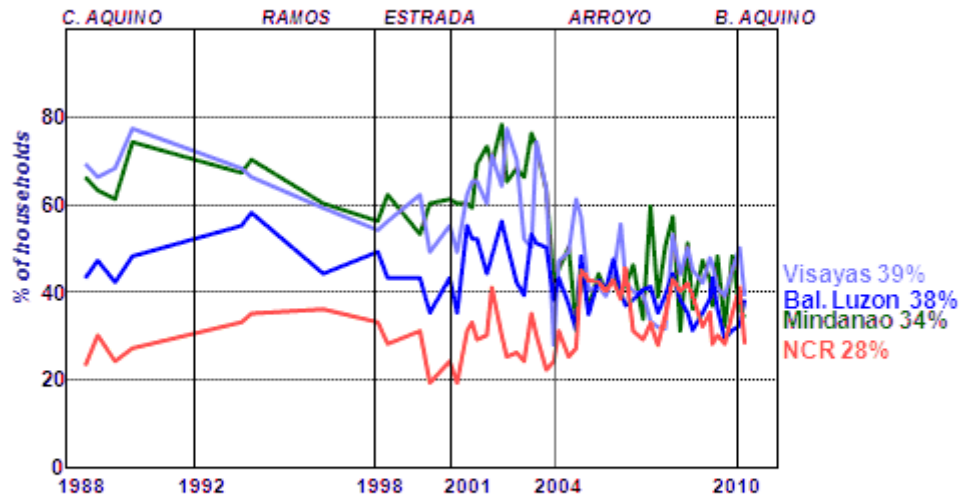


Self-Rated Poverty Question: Where would you place your family in this card? (Not poor, On the line, Poor)



Fourth Quarter 2010 Social Weather Report
November 27-30, 2010 National Survey

**SELF-RATED FOOD POVERTY, BY LOCATION:
TOTAL HOUSEHOLDS, SEP 1988 TO DEC 2010**

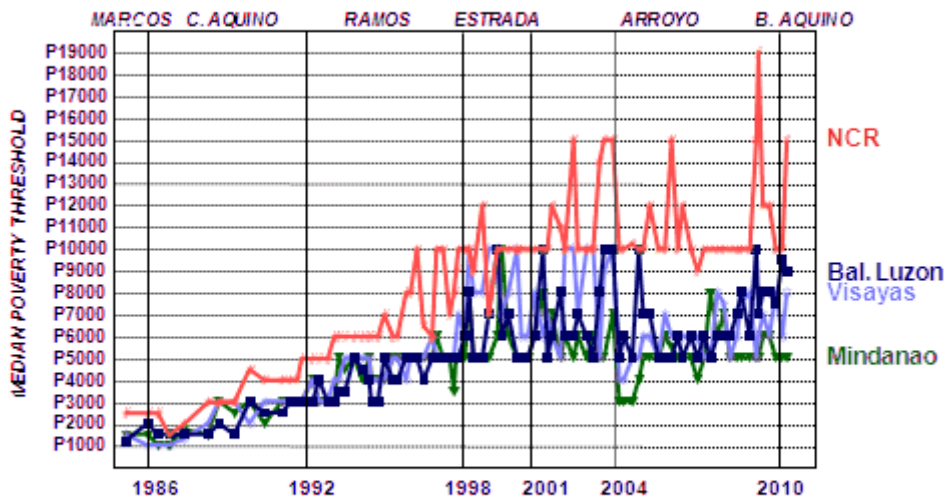


Food Poverty Question: Based on the type of food eaten by your family, where would you place your family on this card? (Not poor, On the line, Poor).

SOCIAL WEATHER STATIONS *Silver Jubilee 1975-2010* 25 years of Statistics for Advocacy

Fourth Quarter 2010 Social Weather Report
November 27-30, 2010 National Survey

**MEDIAN SELF-RATED POVERTY THRESHOLD, BY LOCATION:
POOR HOUSEHOLDS, JUL 1985 TO NOV 2010**



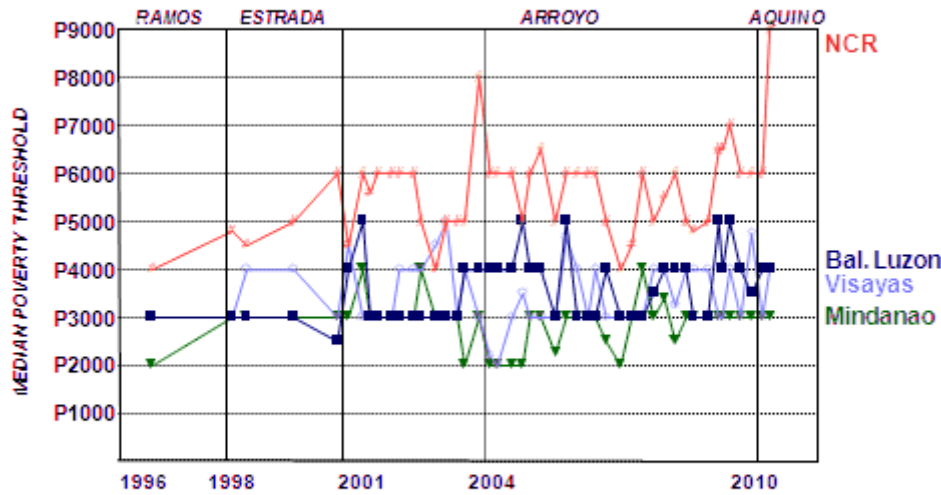
Poverty Threshold Question: IF POOR: In your opinion, how much money would your family need for home expenses each month in order not to be called poor anymore?

SOCIAL WEATHER STATIONS *Silver Jubilee 1975-2010* 25 years of Statistics for Advocacy

Fourth Quarter 2010 Social Weather Report
November 27-30, 2010 National Survey

Chart

**MEDIAN SELF-RATED FOOD POVERTY THRESHOLD, BY LOCATION:
POOR HOUSEHOLDS, SEP 1996 TO NOV 2010**



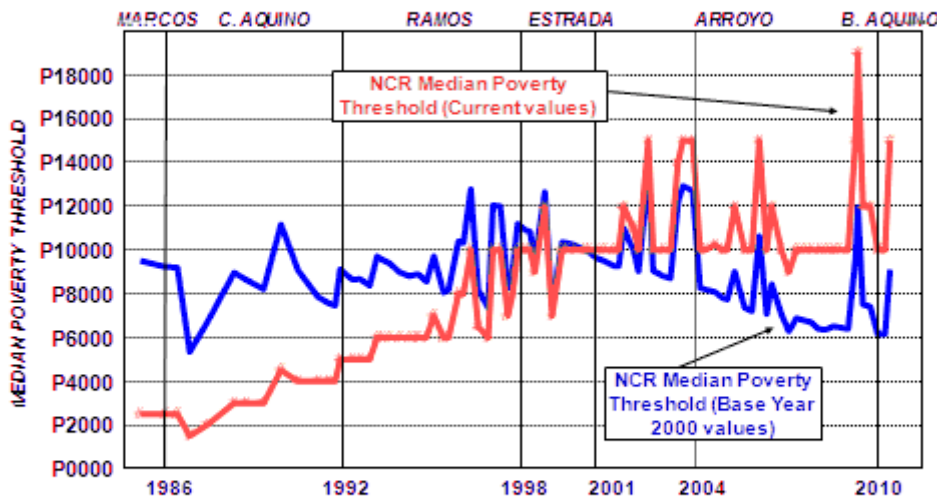
Food Poverty Threshold Question: IF POOR: In your opinion, how much money would your family need for food expenses each month in order not to be called poor anymore in terms of food?



Fourth Quarter 2010 Social Weather Report
November 27-30, 2010 National Survey

Chart

**MEDIAN SELF-RATED POVERTY THRESHOLDS OF POOR HOUSEHOLDS,
IN CURRENT VALUES AND BASE YEAR 2000 VALUES: NATIONAL
CAPITAL REGION, JUL 1985 TO NOV 2010**

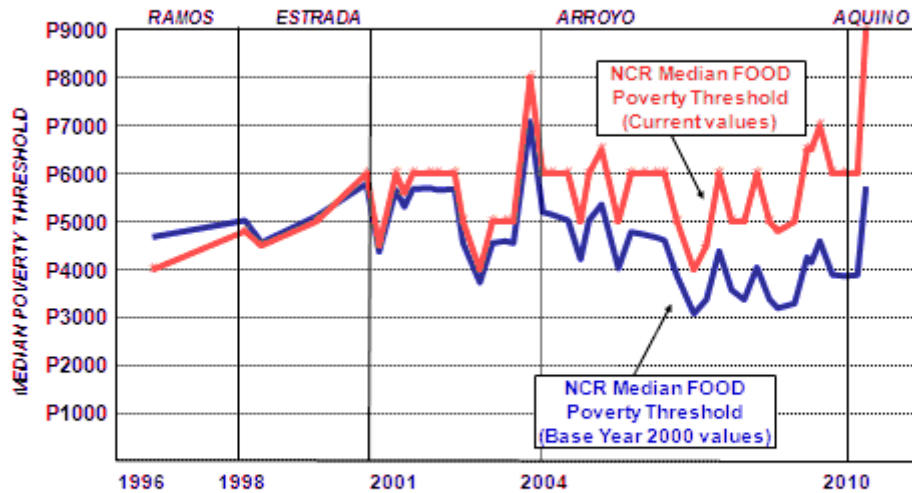


Sources: Social Weather Stations; National Statistics Office.



Fourth Quarter 2010 Social Weather Report
November 27-30, 2010 National Survey

MEDIAN SELF-RATED FOOD POVERTY THRESHOLDS OF POOR HOUSEHOLDS, IN CURRENT VALUES AND BASE YEAR 2000 VALUES: NATIONAL CAPITAL REGION, SEP 1996 TO NOV 2010



Sources: Social Weather Stations; National Statistics Office.



Fourth Quarter 2010 Social Weather Report
November 27-30, 2010 National Survey

WEST EUROPE

Europeans Think That Worse Economic Conditions Are Yet to Come⁵

This report presents the first results of the Standard Eurobarometer wave 74 which was carried out from mid-November to early December 2010¹; it was fielded in 32 countries or territories: the 27 European Union Member States, four candidate countries² (Croatia, the Former Yugoslav Republic of Macedonia, Turkey and Iceland), and the Turkish Cypriot Community in the part of the country that is not controlled by the government of the Republic of Cyprus.

The report presents, under the title "Economic governance in the European Union", firstly, a selection of questions relating to the present financial and economic crisis, governance measures to exit the crisis, measures to improve governance of the financial markets and the perceived role of the various global actors. Then, in a second part, the report focuses on the Europe 2020 strategy, with a view to take up with economic growth on a mid-term perspective. The report is published at the occasion of a major conference organised by the European Commission³ on economic governance in the European Union.

The survey reveals that there is a significant increase in the number of people who feel that the impact of the economic crisis on the job market has already reached its peak. This view is shared by a majority in 13 countries out of 27. This evolution is consistent with the latest official statistics.

⁵ http://ec.europa.eu/public_opinion/archives/eb/eb74/eb74_en.pdf

In November 2010, when this survey was carried out, the first signs of economic recovery were visible: EU27 growth was slightly higher than that recorded in the previous quarter (+0.4 points) and was up as much as +2.1 points⁴ on a year-on-year basis. At the same time, although unemployment has increased slightly in the European Union⁵ (+0.2 points since October 2009), it has fallen significantly in some countries, in particular in Germany, Finland, Sweden and Malta, by -0.5 points or more since October 2009.

However, at a time when some countries are starting to emerge from the economic crisis, others have experienced difficulties, in particular Ireland which faced a serious financial crisis at the time of the survey fieldwork. On 21 November, the Irish government asked the International Monetary Fund and the European Union, through the European Financial Stability Facility, for support.

The various Member States thus find themselves in contrasting economic situations; in some countries there are already signs of an economic recovery while in other Member States it seems the worst is yet to come.

Despite these differences, most countries agree that the European Union should play a major role in resolving the crisis and reforming the global financial system. This report focuses on results from the EU27 Member States and is divided into two parts. The first part focuses on the crisis and how it is perceived by European public opinion. The second part analyses public support for the Europe 2020 strategy: their evaluation of the achievability of its objectives, and their priorities within the different flagship initiatives set out in the strategy.

The Europeans And The Crisis

The economic crisis: has it already "reached its peak", or is "the worst still to come"?

- The feeling that the crisis has already reached its peak is increasing; though it is still the minority view –

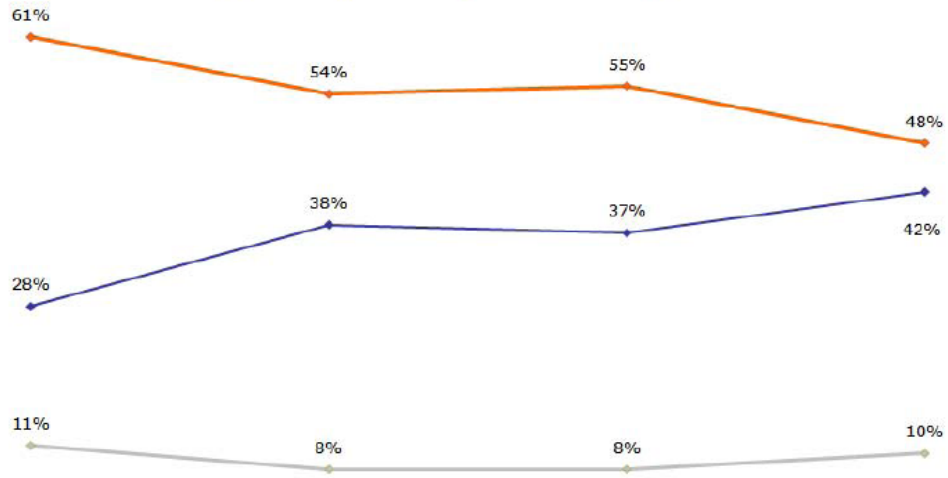
The economic crisis is not over, and a majority of Europeans continue to think that the worse is still to come regarding its impact on the job market (48%). However, this feeling has declined significantly since spring 2010 (from 55%, -7 points), while over the same period, the opposite opinion - that the crisis has already reached its peak - has grown (42%, +5 points).

If European public opinion is quite evenly divided on this topic, perceptions of the situation vary markedly from one country to the other. In 13 countries, the feeling that the impact of the economic crisis on the job market has already reached its peak is held by a majority, in particular in Estonia, Sweden and Austria (all 58%).

The opposite opinion predominates in 13 other Member States: respondents in Greece (75%), Portugal (73%) and Ireland (72%) are most likely to take this view. Respondents in Luxembourg are evenly divided (47% / 47%).

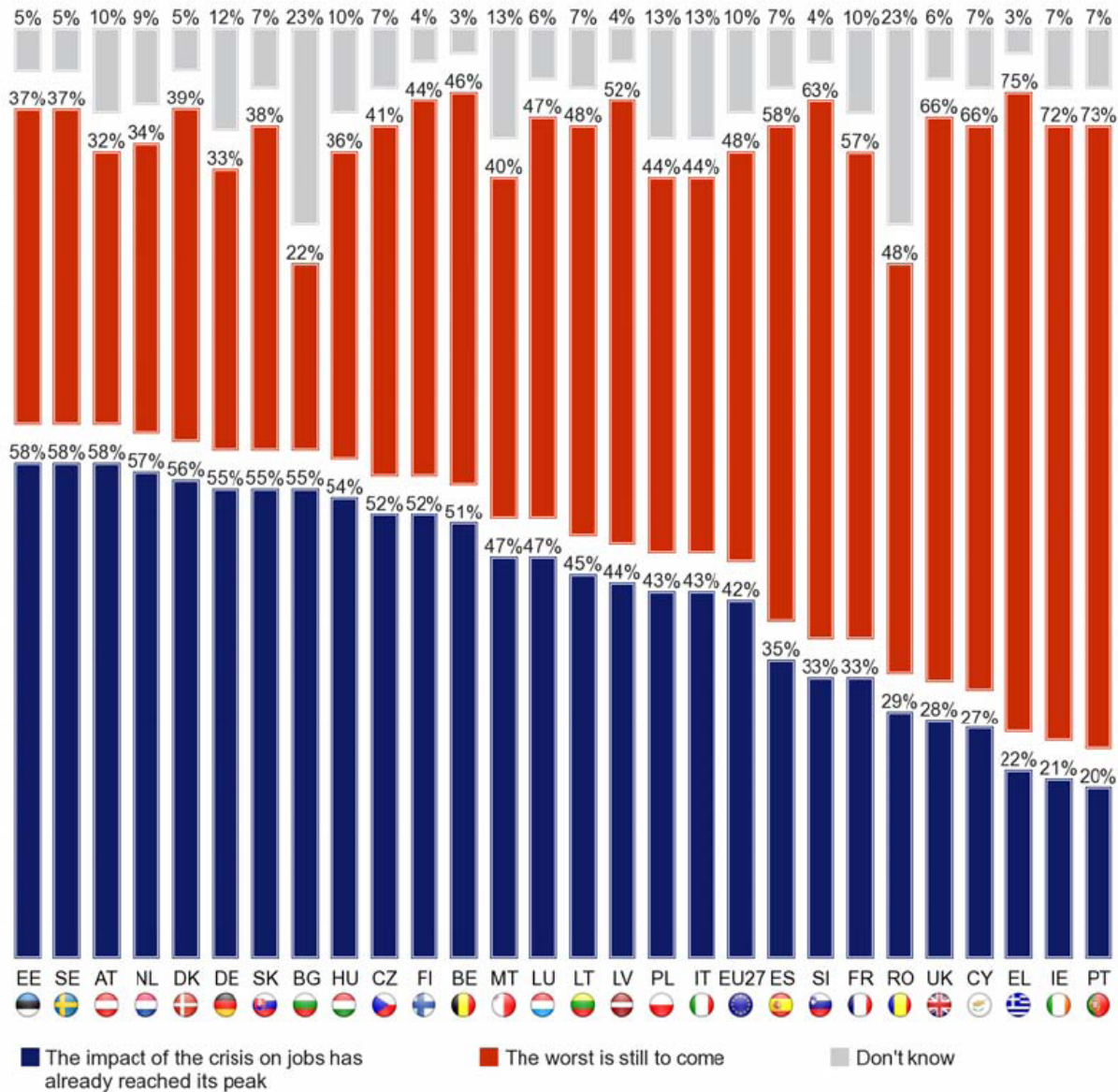
QC1 (...) Which of the two statements is closer to your opinion?
- % EU

◆ The impact of the crisis on jobs has already reached its peak ◆ The worst is still to come ◆ Don't know



May-June 2009 EB71.2	Aug. 2009 EB72	Sep. 2010 EB73	Oct. 2010 EB74
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QC1. Some analysts say that the impact of the economic crisis on the job market has already reached its peak and things will recover little by little. Others, on the contrary, say that the worst is still to come. Which of the two statements is closer to your opinion?



Public opinions are evolving in different directions: optimism has risen spectacularly in Germany (55% think that the crisis has already reached its peak, +24 points), Luxembourg (47%, +21 points), and Austria (58%, +17 points). But in other Member States, the situation has deteriorated since spring 2010, most notably in Ireland (21%, -14 points)⁸ and the UK (28%, -11 points). This pattern can be seen across the results of this whole survey, with perceptions of the economic situation much better than six months ago in Germany, Austria and Luxembourg, and a rise of pessimism in Ireland and the UK.

A socio-demographic analysis reveals that different categories have very varied perceptions of the crisis: a majority of people belonging to the better-off socioeconomic categories consider that

the crisis has already reached its peak, whereas this is the minority view among the more precarious categories: 50% of managers and 47% of employees hold this opinion versus 35% of the unemployed and 35% of house persons.

Similarly, 51% of Europeans who place themselves at the top of the social scale are optimistic, compared with 32% of those at the bottom. The same is true of respondents who almost never have difficulties paying their bills (46%) in contrast to 26% of those struggling to pay their bills most of the time.

Methodology

The methodology used is that of the Standard Eurobarometer surveys of the Directorate-General for Communication (“Research and Speechwriting” Unit). A technical note concerning the interviews, carried out by the institutes within the TNS Opinion & Social network, is annexed to this report. This note describes the interview method used, as well as the confidence intervals

14-1 Many EU Residents See Better Times Ahead⁶

Greeks and Romanians predict their lives will be worse than they are now

January 14, 2011

BRUSSELS -- Residents in most EU countries surveyed in 2010 expect their lives will be closer to ideal five years from now. On a 0-to-10 scale, with 10 being the best possible life, people in nearly all EU countries -- except Greece, Romania, Luxembourg, and Slovenia -- give their future lives higher average ratings than their present ones. Greeks and Romanians alone predict their lives will be worse in five years; Luxembourgers and Slovenians don't expect their lives to be any different.

⁶ http://www.gallup.com/poll/145601/Residents-Better-Times-Ahead.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Wellbeing

Average Life Evaluations in the EU

Based on the 0- to-10 Cantril Self-Anchoring Striving Scale

Zero represents the worst possible life and 10 represents the best possible life.

	Average current life rating	Average future life rating
Denmark	7.77	8.14
Netherlands	7.50	7.61
Sweden	7.50	8.21
Finland	7.39	7.69
Austria	7.37	7.52
Ireland	7.25	8.00
Luxembourg	7.10	7.08
United Kingdom	7.02	7.69
Belgium	6.84	7.02
France	6.80	7.00
Germany	6.73	6.96
Cyprus	6.39	6.87
Italy	6.37	7.08
Spain	6.19	6.67
Slovenia	6.17	6.16
Czech Republic	6.15	6.35
Slovakia	6.05	6.63
Greece	5.84	5.28
Malta	5.78	6.21
Poland	5.77	6.25
Lithuania	5.07	5.80
Romania	4.90	4.77
Portugal	4.87	5.22
Hungary	4.72	5.39
Bulgaria	4.21	4.92

Surveys conducted in 2010.

See survey methods for full question wording.

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In about one-third of the EU member states surveyed, residents expect significant improvements of nearly a full point over the next five years. These include highly developed countries such as the United Kingdom, Sweden, and Ireland, where average current life ratings are already relatively high, and Italians, whose current life evaluations fall somewhere in the middle. In less highly developed countries, such as Bulgaria, Hungary, and Lithuania, residents give their present lives relatively low ratings but also have higher expectations for the future.

Optimism Abounds in Many Countries

Optimists heavily outnumber pessimists in a number of countries. Fifty-seven percent of Lithuanians give their future lives better ratings than their present ones, and more than 40% in the United Kingdom, Ireland, Sweden, Bulgaria, Hungary, Slovakia, Spain, and Italy expect their future lives to be better.

*Percentage of EU Residents Who Rate Their Future Lives
Higher or Lower Than Their Current Ones*

	Higher	Lower
Lithuania	57%	19%
Ireland	46%	15%
Italy	45%	17%
Hungary	45%	12%
Sweden	45%	8%
Slovakia	45%	14%
United Kingdom	44%	13%
Spain	42%	17%
Bulgaria	42%	8%
Poland	40%	13%
Cyprus	40%	23%
Czech Republic	38%	26%
Finland	37%	18%
Malta	37%	25%
Portugal	37%	29%
France	34%	24%
Denmark	34%	14%
Germany	33%	20%
Austria	30%	19%
Slovenia	29%	26%
Belgium	28%	18%
Romania	27%	34%
Luxembourg	26%	24%
Netherlands	24%	15%
Greece	23%	43%

2010

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In a few countries, the share of optimists is much lower. In Greece and Romania -- where severe budget cuts and high unemployment put a damper on economic expectations -- about one-quarter of respondents rate their future lives higher than their present ones. In countries where current average life ratings are already relatively high, such as the Netherlands, Belgium, and Austria, majorities do not rate their future lives any differently.

In five countries, one in four or more rate their current lives better than their futures. Pessimism is higher in Greece (43%), Romania (34%), Portugal (29%), the Czech Republic (26%), and Malta (25%).

Future Expectations Change by Generation

Young people across most of Europe are more likely than older people to rate their future better than their present. Fifteen- to 29-year-olds are the most likely to expect to be better off in the future while those aged 65 and older are the least likely to predict improvement. In every country, the percentage of respondents who rate their own future better than their present decreases gradually with age.

*Percentage of EU Residents Who Rate Their Future Lives
Higher Than Their Current Ones*

By age group

	Aged 15 to 29	Aged 65 and older
Lithuania	81%	24%
Slovakia	69%	20%
Hungary	66%	25%
Sweden	66%	14%
United Kingdom	65%	11%
Germany	62%	8%
Italy	61%	31%
Czech Republic	61%	10%
France	61%	7%
Cyprus	60%	17%
Spain	59%	22%
Ireland	58%	12%
Bulgaria	58%	24%
Portugal	57%	12%
Poland	56%	14%
Austria	56%	4%
Finland	55%	8%
Denmark	54%	6%
Slovenia	54%	13%
Malta	52%	23%
Romania	47%	11%
Greece	41%	7%
Netherlands	38%	8%
Luxembourg	38%	5%
Belgium	35%	16%

2010

GALLUP®

In most countries, a majority of young people give their future lives higher ratings. The only exceptions are Belgium (35%), Luxembourg and the Netherlands (both 38%), and, among those with current low life satisfaction, Romania (47%) and Greece (41%).

Bottom Line

Despite recent economic and financial troubles, most Europeans have not lost hope that their lives will improve, and young people continue to be very optimistic about their future overall. Even in some of the hardest hit countries economically, people seem to perceive the crisis as a temporary setback, expecting large improvements in the near future.

Survey Methods

Results are based on face-to-face and telephone interviews with approximately 1,000 adults in each EU member state between May and August 2010. For results based on each sample of national adults, one can say with 95% confidence that the maximum margin of sampling error ranged from a low of ± 3.5 percentage points to a high of ± 4.0 percentage points.

Gallup's life evaluation questions, based on the Cantril Self-Anchoring Striving Scale, are worded as follows:

Current life ratings: Please imagine a ladder with steps numbered from zero at the bottom to 10 at the top. Suppose we say that the top of the ladder represents the best possible life for you, and the bottom of the ladder represents the worst possible life for you. On which step of the ladder would you say you personally feel you stand at this time, assuming that the higher the step the better you feel about your life, and the lower the step the worse you feel about it? Which step comes closest to the way you feel?

Predicted life ratings: Please imagine a ladder with steps numbered from zero at the bottom to 10 at the top. Suppose we say that the top of the ladder represents the best possible life for you and the bottom of the ladder represents the worst possible life for you. Just your best guess, on which step do you think you will stand on in the future, say about five years from now?

15-7 Business Leaders Show Overwhelming Support For The Coalition And Cuts⁷

Date: 5 January 2011

A massive 89 per cent of UK business leaders agree that the Government's policies will improve the state of the British economy according to the 2010 Captains of Industry survey from Ipsos MORI. There is also strong support for the Coalition's cuts programme, with 75 per cent saying that the deficit needs to be cut quickly, which increases to 85 per cent of FTSE 350 respondents.

This year the captains of British industry are the most positive since 2006 about their organisation. 60 per cent think business for their own company will improve in the next year, while only seven per cent believe it will get worse.

Ben Page, chief executive, Ipsos MORI, said:

⁷ <http://www.ipsos-mori.com/newsevents/latestnews/621/Business-leaders-show-overwhelming-support-for-the-Coalition-and-cuts.aspx>

“This time last year 70 per cent of business leaders disagreed that the Labour Government’s policies would improve the economy so it is fair to say that business leaders prefer the coalition’s economic plan. Many in the private sector believe that they have already had their recession and to enable them to return to more profitable times it is necessary for the public sector to face up to a different economic environment.”

Since the recession businesses have been focusing on cutting costs. However, in 2011 the biggest changes will be in the area of new product development according to 23% of respondents. Other big changes for the next 12 months will be shifting with consumer preferences and utilising improved technology, suggesting that businesses won’t be shrinking in order to survive, but will instead be looking at how to grow.

Challenges facing business

The most important issue facing businesses today continues to be consumer demand according to a quarter (25 per cent) of business leaders.

There is also concern with regards to the levels of regulation, with 19 per cent saying it is their biggest challenge. Almost three quarters (74 per cent) feel that the level of regulation affecting business in the UK overall has increased over the last twelve months, while 86 per cent believe that level of regulation is harming the British economy.

There are mixed views with regards to immigration in the UK. Around half (48 per cent) of business leaders agree that immigration restrictions are making the UK economy less competitive, while 24 per cent disagree and 27 per cent say that it has no difference.

Commenting on the findings, Secretary of State for Work and Pensions, the **Rt Hon Iain Duncan Smith** said:

“This research by Ipsos MORI confirms that key business leaders overwhelmingly support the Coalition's economic policy. It is crucial that we tackle the deficit and put Britain on a stable fiscal footing and this view is shared by the private sector. As the economy grows we need to ensure that Britain has a workforce that is ready and willing to work, and that is why I am pressing ahead with whole scale reform of the benefits system and investing billions in Britain's biggest welfare to work programme.”

Technical note

Established in 1981 and conducted on an annual basis, the Ipsos MORI Captains of Industry survey is the authoritative view of senior business opinion in Britain today. 102 interviews were carried out with respondents selected from the FTSE 350, and top 100 by capital employed. Respondents are Chairman, CEO, MD/COO, FD or other board directors.

13-8 No Clear Public Support For Minimum Pricing Of Alcohol⁸

Published: 31 December 2010

⁸ <http://www.ipsos-mori.com/researchpublications/researcharchive/poll.aspx?oltemId=2715>

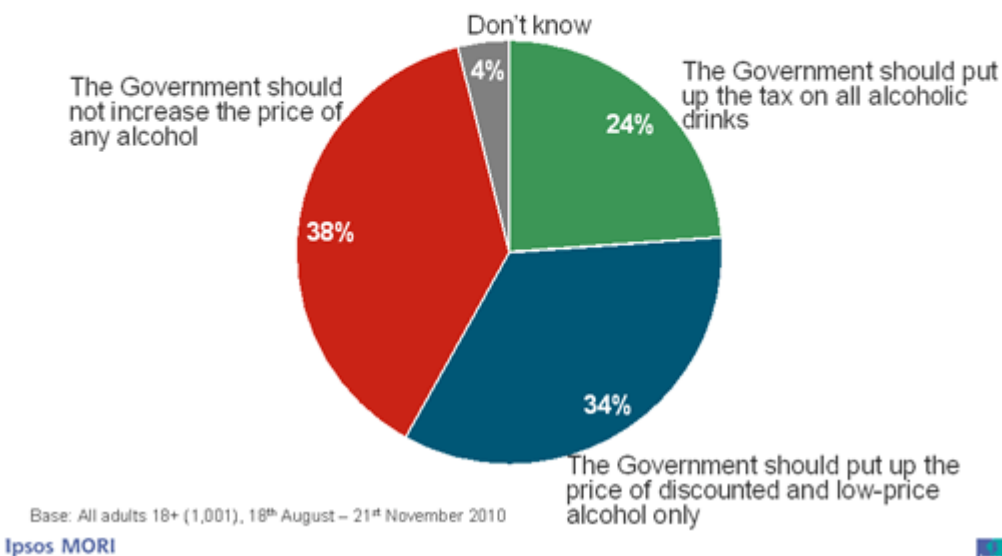
Fieldwork: 18 August - 21 November 2010

As Hogmanay approaches, many Scots will come together tonight to celebrate with a wee dram to bring in the bells. However, what do they think about the Scottish Government's plans to increase the price of alcohol?

According to our latest Scottish Public Opinion Monitor, most Scots (58%) do think there should be an increase in the price of at least some types of alcohol. Around a third (34%) think that the government should put up the price of discounted and low-price alcohol only, while around a quarter (24%) think the government should put up the tax on all alcoholic drinks. Despite this, a sizeable proportion of Scots (38%) think that the government should avoid increasing the price of any alcohol.

Views on increasing the price of alcoholic drinks

Q. Governments try to reduce the amount of alcohol people drink by increasing its price. Which of the following three statements comes closest to your view on this issue?



Our survey also revealed clear differences in opinion by gender and age. Men were more likely than women to think the government should not put up the price of any alcohol (42% compared to 34%). Younger respondents were more likely to think the government should resist putting up the price of any alcohol (52% of those aged 18-24 compared to 34% of those aged 55 and over), while older respondents were more likely to think the government should put up the tax on all alcoholic drinks (29% of those aged 55 and over compared to 16% of those aged 18-24).

In addition, respondents living in urban areas were more likely to think the government should not put up the price of any alcohol (40% compared to 29% of those living in rural areas), while those living in rural areas were more likely to think the government should put up the tax on all alcoholic drinks (31% compared to 22% of those living in urban areas).

Technical note

Based on interviews with 1,001 adults aged 18+ between 18th August and 21st November 2010.

A Third of Britons Back Alternative Vote, Just as Many Still Undecided⁹

01/12/11) -

More than half of respondents say they are “not too informed” or “not informed at all” about the proposed electoral system.

As Britons begin to ponder their options on a referendum that could change the way lawmakers are elected, the proposal to switch to the alternative vote system is ahead, although a large number of voters remain undecided, a new Vision Critical / Angus Reid poll has found.

The referendum, which is scheduled for 5 May 2011 in the United Kingdom, will ask voters whether the United Kingdom should continue to rely on the first past the post system to elect MPs to the House of Commons, or move to the alternative vote system instead.

In the online survey of a representative sample of 2,010 British adults, 37 per cent of respondents say they would vote Yes to switch to the alternative vote system to elect MPs to the House of Commons. One-in-five respondents (20%) would cast a No ballot in order to keep the existing first past the post system. More than a third of respondents (37%) are undecided, and six per cent would not vote.

The change to the alternative vote system is most popular in Scotland (42%) and least supported in Midlands and Wales (31%). While Conservative Party voters in the 2010 General Election are virtually split when assessing the change (34% would vote Yes, 30% would voter No) the gap is larger for Labour Party voters (Yes 36%, No 23%). Liberal Democrats favour the change by a 6-to-1 margin (Yes 53%, No 9%).

The high level of undecided voters appears to be related to lack of information. More than half of Britons (54%) say they are “not too informed” or “not informed at all” about the alternative vote system—including a majority of Labour (56%) and Liberal Democrat (53%) voters.

Analysis

With four months to go before the referendum takes place, the only group that seems unquestionably motivated to enact change is formed by Liberal Democrats. At least a third of respondents across the country remain undecided, and just two-in-five say they are well informed about the proposed new system. The stance of party leaders will play a significant role in boosting the level of support for the Yes and No sides as the referendum draws near.

Methodology: From January 6 to January 7, 2011, Vision Critical conducted an online survey among 2,010 randomly selected British adults who are Springboard UK panelists. The margin of error—which measures sampling variability—is +/- 2.2%. The results have been statistically weighted according to the most current education, age, gender and region data to ensure samples representative of the entire adult population of Great Britain. Discrepancies in or between totals are due to rounding.

⁹ <http://www.angus-reid.com/polls/43743/a-third-of-britons-back-alternative-vote-just-as-many-still-undecided/>

43438 Labour Still Leads in Britain, Even if Coalition Partners Run Together¹⁰

(01/07/11) -

Only a third of people who voted for the Liberal Democrats in 2010 would support the party if it runs in tandem with the Tories.

The opposition Labour Party remains ahead of the Conservatives in Britain, while the Liberal Democrats have recovered from their poor showing in December, a new Vision Critical / Angus Reid poll has found.

In the online survey of a representative sample of 2,010 British adults, 40 per cent of decided voters and leaners (-1 since late December) say they would support the Labour candidate in their constituency in the next General Election.

The Conservative Party is second with 35 per cent (=), followed by their coalition partners—the Liberal Democrats—with 12 per cent (+3).

The United Kingdom Independence Party (UKIP) is next on the list with five per cent, followed by the Scottish National Party (SNP) with three per cent, the Green Party with two per cent, the British National Party (BNP) also with two per cent, and Plaid Cymru with one per cent.

Labour is practically tied with the Tories in London (38% to 36%) and holds a 20-point lead in the North (46% to 32%) and a four-point edge in Midlands and Wales (41% to 37%). The Tories are ahead in the South of England (43% to 34%). In Scotland, Labour maintains its eight-point advantage on the SNP (42% to 34%).

A Merged Coalition Party?

The survey was conducted at the height of speculation related to the possibility of the two coalition partners running together in the next General Election. Respondents were asked to reconsider their options in a campaign in which the Conservatives and Liberal Democrats ran as a single party. Under this scenario, Labour remains on top with the support of 45 per cent of decided voters and leaners. The joint Conservative / Liberal Democrats is second with 38 per cent.

Analysis

Support for the Conservatives has remained stagnant, while the Liberal Democrats managed to get back to double digits after a severe drop in December. Labour has solidified its position as the most popular party at the moment.

The prospect of a unified coalition party would be particularly beneficial for Labour in the North. The Coalition partners would be slightly ahead of Labour in London, but make little headway among particular demographics, with the exception of voters over the age of 55.

The main hindrance for the unified Coalition party—if it ever materializes—would be the patent disappointment from Liberal Democrat supporters. While the merged party would hold on to

¹⁰ <http://www.angus-reid.com/polls/43729/labour-still-leads-in-britain-even-if-coalition-partners-run-together/>

four-in-five voters who cast a ballot for a Conservative candidate in 2010 (83%), only one third of Liberal Democrat voters in 2010 (32%) would support a joint Tory/Lib-Dem candidate. In fact, almost half of them (46%) would vote for Labour instead.

Methodology: From January 6 to January 7, 2011, Vision Critical conducted an online survey among 2,010 randomly selected British adults who are Springboard UK panelists. The margin of error—which measures sampling variability—is +/- 2.2%. The results have been statistically weighted according to the most current education, age, gender and region data to ensure samples representative of the entire adult population of Great Britain. Discrepancies in or between totals are due to rounding.

NORTH AMERICA

15-17 Americans Want Congress, Obama to Tackle Economic Issues¹¹

Roughly half of Americans rate the economy and unemployment as extremely important issues
January 14, 2011

PRINCETON, NJ -- Americans place the highest priority on domestic issues -- particularly those related to economic matters -- when asked to rate how important each of 15 issues is for the president and Congress to deal with this year.

¹¹ http://www.gallup.com/poll/145592/Americans-Congress-Obama-Tackle-Economic-Issues.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20Politics%20-%20USA

Next, how important is it to you that the president and Congress deal with each of the following issues in the next year -- is it -- extremely important, very important, moderately important, or not that important? How about -- [RANDOM ORDER]?

	% Extremely important	% Extremely/Very important
The economy	52	93
Unemployment	47	89
The federal budget deficit	44	84
Corruption in government	44	83
Education	40	79
Healthcare	40	78
Terrorism	40	76
Social Security	36	78
Medicare	32	71
The situation in Afghanistan	32	71
Gas and home heating prices	31	68
Illegal immigration	30	64
Taxes	27	66
The situation in Iraq	27	62
The environment	24	59

Gallup, Jan. 7-9, 2011

GALLUP

The Jan. 7-9 Gallup poll finds 52% of Americans saying it is extremely important for the president and Congress to deal with the economy this year, slightly more than the 47% who rate unemployment this way. Forty-four percent of Americans view the federal budget deficit and corruption in government as extremely important priorities.

The highest-ranking international issue is terrorism, with 40% of Americans rating it as extremely important; the situations in Afghanistan (32%) and Iraq (27%) are much lower priorities.

The environment is the lowest-ranked issue overall, with 24% saying it is extremely important.

These results are generally in line with what Gallup measured prior to last year's congressional elections, when the economy and jobs were the issues voters said were most important to their vote. They also echo the recent trend in Gallup's most important problem question.

Among party groups, the economy is the top-ranked issue, or tied for the top. Unemployment is no worse than the fourth-ranked issue among Republicans, Democrats, and independents. Republicans and Democrats differ significantly in the importance they assign to the federal budget deficit and illegal immigration (higher Republican priorities), and healthcare, education, and the environment (higher Democratic priorities).

Issue Importance, by Party

Figures are percentage rating each "extremely important"

	% Democrats	% Independents	% Republicans
The economy	50	50	55
Unemployment	50	46	44
The federal budget deficit	37	46	50
Corruption in government	43	44	46
Education	45	40	32
Healthcare	47	39	33
Terrorism	38	40	42
Social Security	37	38	32
Medicare	37	29	29
The situation in Afghanistan	36	30	29
Gas and home heating prices	30	31	31
Illegal immigration	20	32	39
Taxes	24	27	31
The situation in Iraq	30	26	26
The environment	29	23	18

Gallup, Jan. 7-9, 2011

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Gallup asked this issue priority question at least yearly from 2001-2007 before the current update. The full trends are available in the downloadable PDF document at the bottom of this page. Among the notable changes are:

- Concerns about terrorism have dropped significantly, establishing a new low of 40% extremely important in the current poll. The prior low was 47% in April 2005, and terrorism scored above 50% in 8 of the 10 measurements prior to this year.

How Important Is It for the President and Congress to Deal With Terrorism?

■ % Extremely important

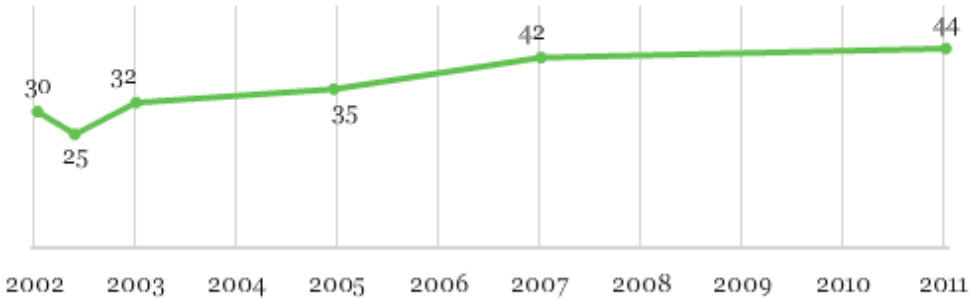


GALLUP®

- The 44% mentioning the federal budget deficit as an extremely important issue is the highest Gallup has measured, up slightly from 42% in January 2007 and up significantly from an average 31% from 2002-2004.

How Important Is It for the President and Congress to Deal With the Federal Budget Deficit?

■ % Extremely important

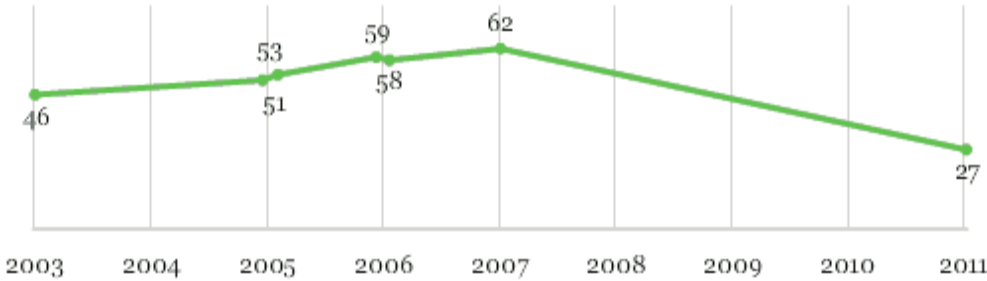


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- The situation in Iraq has fallen to the bottom half of issue priorities, with 27% now saying it is extremely important; prior to this year, it had usually been at or near the top of the list since early 2003, including a high of 62% in the last measurement, in early 2007.

How Important Is It for the President and Congress to Deal With the Situation in Iraq?

■ % Extremely important



GALLUP

- The passage of healthcare legislation last year has reduced the issue's importance slightly, to a new low of 40%. From 2003-2007, an average of 47% said healthcare was an extremely important issue for the president and Congress.
- Taxes rank as a low priority for Americans (27% extremely important), but this is typical (average 29% extremely important from 2001-2005) rather than a response to Congress' recently addressing the issue with the late 2010 bipartisan tax deal.

Implications

The relatively lower priority Americans place on international matters and non-economic domestic issues underscores the primacy of the economy as a political issue. When the economy is struggling, it tends to crowd out other concerns in Americans' minds, but the current poll makes it clear where Americans want the Congress and President Obama to focus their efforts.

Survey Methods

Results for this Gallup poll are based on telephone interviews conducted Jan. 7-9, 2011, with a random sample of 1,018 adults, aged 18 and older, living in the continental U.S., selected using random-digit-dial sampling.

For results based on the total sample of national adults, one can say with 95% confidence that the maximum margin of sampling error is ± 4 percentage points.

Interviews are conducted with respondents on landline telephones (for respondents with a landline telephone) and cellular phones (for respondents who are cell phone-only). Each sample includes a minimum quota of 150 cell phone-only respondents and 850 landline respondents, with additional minimum quotas among landline respondents for gender within region. Landline respondents are chosen at random within each household on the basis of which member had the most recent birthday.

Samples are weighted by gender, age, race, education, region, and phone lines. Demographic weighting targets are based on the March 2010 Current Population Survey figures for the aged 18 and older non-institutionalized population living in continental U.S. telephone households. All reported margins of sampling error include the computed design effects for weighting and sample design.

In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.

10-12 Zogby Interactive: Less Than 40% Believe Shootings Will Change Political Tone; Majorities Say Politics Did Not Motivate Shooter¹²

Majorities Both Oppose & Don't Expect More Gun Control Laws

UTICA, New York - A new Zogby International interactive poll of likely voters about the shooting of Rep. Gabrielle Giffords and 19 others in Tucson, AZ found most do not expect it will change political rhetoric and that the shooter was not politically motivated.

Also, 60% say the shootings should not lead to stronger gun control laws, and 71% doubt stricter laws will be enacted.

Here are results of the survey for all voters, as well as for Democrats, Republicans and independents. Totals in tables may not add up to 100% due to rounding.

Do you believe that politicians bear some responsibility for the shooting of Rep. Gabrielle Giffords and the other people in Tucson, AZ due to the language and images they use against other politicians?

Response	All Voters	Democrats	Republicans	Independents
Yes	38%	71%	8%	34%
No	56%	19%	89%	59%
Not sure	7%	10%	3%	7%

Do you believe the alleged perpetrator of the Tucson shootings targeted Rep. Giffords because of her political beliefs?

Response	All Voters	Democrats	Republicans	Independents
Yes	28%	47%	12%	25%
No	42%	22%	60%	44%
Not sure	30%	31%	28%	32%

¹² <http://www.zogby.com/news/ReadNews.cfm?ID=1939>

Do you believe the shooting of Rep. Gabrielle Giffords and others in Tucson, AZ will lead to more moderation in the language and images politicians use when talking about issues and politicians and others who disagree with them?

Response	All Voters	Democrats	Republicans	Independents
Yes, this is a wake-up call and a turning point and politicians will raise the level of respect when disagreeing with others.	4%	8%	2%	4%
Somewhat, this will moderate the rhetoric, but only in the short term.	34%	45%	22%	36%
No, there will be no change in how politicians speak of the opposition.	47%	41%	52%	47%
There is nothing wrong with the way politicians currently speak of the opposition.	12%	3%	21%	11%
Not sure	3%	4%	3%	3%

Which party's politicians do you believe are most responsible for language and images that might encourage violent actions by the public?

Response	All Voters	Democrats	Republicans	Independents
Democrats	20%	4%	36%	20%
Republicans	37%	75%	3%	31%
Neither	27%	8%	47%	27%
Both equally responsible	15%	13%	13%	21%
Not sure	1%	1%	1%	1%

Should the opinion media (TV, radio, blogs, etc.) share some blame for the shooting of Congresswoman Giffords and the others in Tucson?

Response	All Voters	Democrats	Republicans	Independents
Yes	39%	67%	12%	38%
No	52%	20%	84%	52%
Not sure	9%	12%	4%	10%

Do you think the shootings in Tucson should lead to toned down rhetoric on the talk shows (radio and TV)?

Response	All Voters	Democrats	Republicans	Independents
Yes	43%	75%	12%	40%
No	51%	19%	82%	52%
Not sure	6%	6%	6%	8%

Which statement best reflects your thinking on the recent shootings of Rep. Giffords and others in Tucson?

Response	All Voters	Democrats	Republicans	Independents
The shootings were the actions of a deranged man determined to inflict mayhem and they could not have been prevented.	63%	34%	91%	64%
Stricter controls of guns and ammunition could have prevented the tragedy.	24%	48%	2%	20%
Neither	9%	9%	5%	12%
Not sure	5%	8%	2%	5%

Do you think the shootings in Tucson should lead to stronger gun control policies in the U.S.?

Response	All Voters	Democrats	Republicans	Independents
Yes	35%	67%	6%	31%
No	60%	26%	92%	61%
Not sure	6%	6%	3%	8%

Do you think the shootings in Tucson will lead to stronger gun control policies in the U.S.?

Response	All Voters	Democrats	Republicans	Independents
Yes	10%	11%	11%	8%
No	71%	76%	65%	71%
Not sure	20%	14%	24%	21%

Pollster John Zogby: "The tragedy in Tucson further exposed the divisions between Democrats and Republicans and showed voters have little hope the shootings will change the tone of our politics. So we will wait and see if President Obama's memorial service speech changes that dynamic."

The interactive poll consisting of 4,043 likely voters was conducted beginning on the evening of January 11 and concluded on the morning of January 13, 2011, and has a margin of error of +/- 1.6%. Slight weights were added to region, party, age, race, religion, gender and education to more accurately reflect the population.

13-13 Gallup Review: Public Opinion Context of Tucson Shootings¹³

Less support for gun control in recent years, evidence of increased polarization
 January 10, 2011

¹³ http://www.gallup.com/poll/145526/Gallup-Review-Public-Opinion-Context-Tucson-Shootings.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20Politics%20-%20USA

PRINCETON, NJ -- The deadly shootings in Tucson, Ariz., on Saturday, resulting in the deaths of six and the wounding of 14 others, including U.S. Rep. Gabrielle Giffords, have raised a number of questions about the context and environment in which these events took place. As the nation waits for more facts to become known about the accused's background and motives, discussion about the case in the media and online has focused largely on Arizona's gun control laws, reports that the accused shooter was a drug user, and the broader divisive political climate in the country. This article reviews public opinion on several aspects of these matters.

Less Support for Gun Control, Despite Other Shootings

"Almost half of Americans say they perceive the federal government to be an "immediate threat to the rights and freedoms of ordinary citizens," and this percentage is up in recent years."

Initial reports of the Arizona shootings indicate that the accused killer legally purchased his gun and lawfully carried it to the site of Gifford's public appearance in Tucson under Arizona's concealed weapons laws. At least one Democratic member of Congress is now planning to introduce legislation to stiffen the laws around the type of semi-automatic pistol used in the attack, and the tragedy is bound to increase public discussion of gun control laws more generally. Whether this will alter Americans' views of gun laws, however, is far from certain.

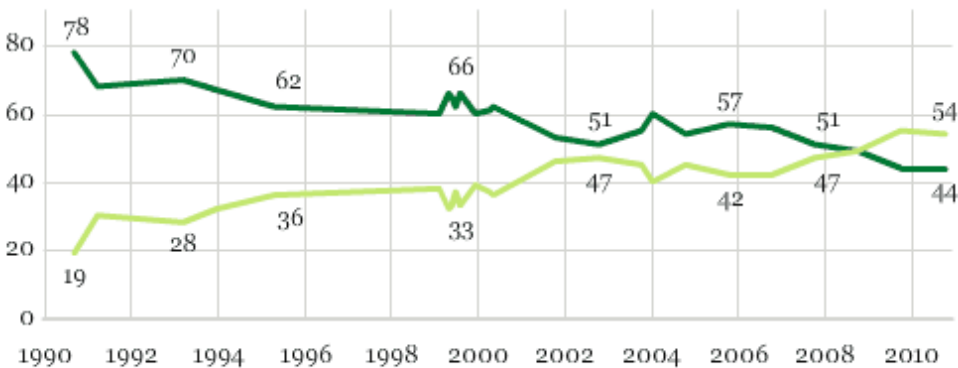
Gallup trends on gun control show that Americans have grown less supportive of strengthening gun laws in the United States over the last two decades, notwithstanding a number of tragic gun attacks during that period.

The percentage in favor of making the laws governing the sale of firearms "more strict" fell from 78% in 1990 to 62% in 1995, and 51% in 2007. In the most recent reading, Gallup in 2010 found 44% in favor of stricter laws. In fact, in 2009 and again last year, the slight majority said gun laws should either remain the same or be made less strict.

Gun Laws

In general, do you feel that the laws covering the sale of firearms should be made more strict, less strict, or kept as they are now?

■ % More strict ■ % Less strict/Kept as now



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The downward trend in support for stricter gun control stalled briefly in 1999 after the Columbine High School massacre; however, the slight increase in support for stricter gun laws seen at that time (to 66%) proved temporary. The general downward trend in support for stricter gun laws has continued even though several high-profile civilian gun crimes, including the 2002 Washington, D.C.,-area sniper attacks, a 2005 shooting at an Indian reservation in Minnesota, a 2007 shooting at a Nebraska shopping mall, the Virginia Tech massacre in 2007, and shooting rampages in 2009 in Alabama and at a Binghamton, N.Y., citizenship center, have occurred over the past decade.

The same pattern is seen with respect to banning average Americans from owning handguns. Support for that proposal has fallen by one-third over the past two decades.

Handgun Control

Do you think there should or should not be a law that would ban the possession of handguns, except by the police and other authorized persons?

■ % Should be



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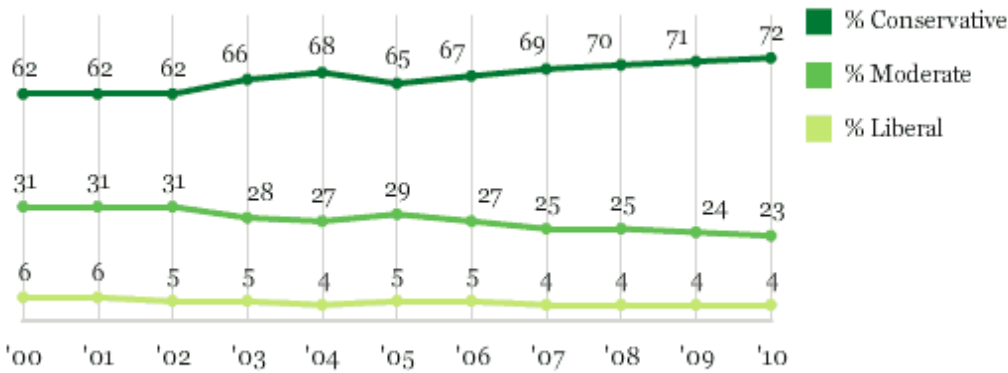
U.S. Slightly More Polarized in Recent Years

The Tucson shootings took place at a political event sponsored by Giffords, a Democrat. Authorities believe that Giffords, the first person shot by the gunman, was the primary target. The attempted assassination of a sitting member of Congress raises questions about the possible impact of what many characterize as a divisive and partisan political environment in the country.

Arizona, the location of the shootings, has its own set of political realities, including continuing controversy over the state's illegal immigration law. Nationally, recent Gallup analyses show that the U.S. ideological structure has become at least slightly more polarized since about 2000. Americans who identify with the Republican Party are increasingly likely to call themselves conservative rather than moderate. Those who identify with the Democratic Party are increasingly likely to view themselves as liberal rather than moderate.

Recent Political Ideology Trend -- Among Republicans

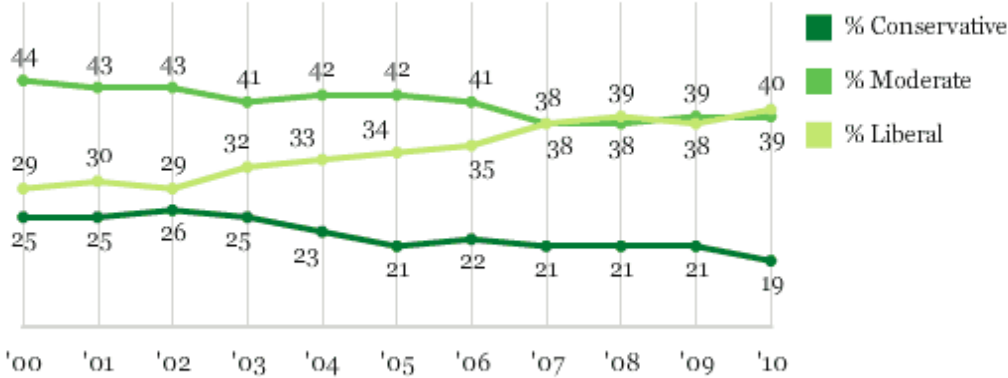
Based on annual averages



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Recent Political Ideology Trend -- Among Democrats

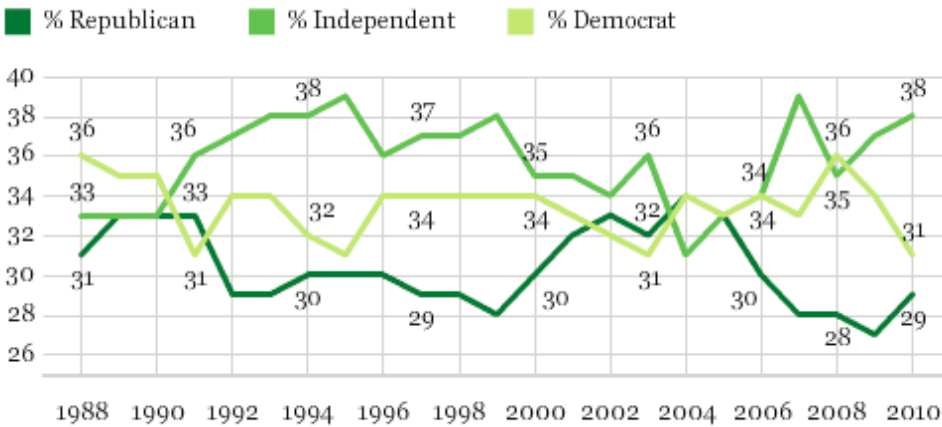
Based on annual averages



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However, in terms of party identification more broadly, the percentage of Americans identifying as politically independent nationally in 2010 -- 38% -- was within one percentage point of the record high in Gallup trends since 1988, thus suggesting less political polarization. The percentages of partisans -- both Republicans and Democrats -- were at or near record lows.

Party Identification Annual Averages, Gallup Polls, 1988-2010



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At the same time, recent Gallup polling suggests that Americans, perhaps cognizant of the polarized nature of political dialogue today, tilt toward a position that favors less polarization and more compromise among the nation's political leaders. In Gallup's Jan. 7-9 survey, 47% of Americans said they were most in favor of political leaders compromising to get things done rather than sticking to their principles, while 28% put themselves on the other end of the scale, advocating that political leaders stick to principles regardless of how little gets done. These results are very close to what was measured in November.

1/11/11 Congress Job Approval Rebounds to 20%¹⁴

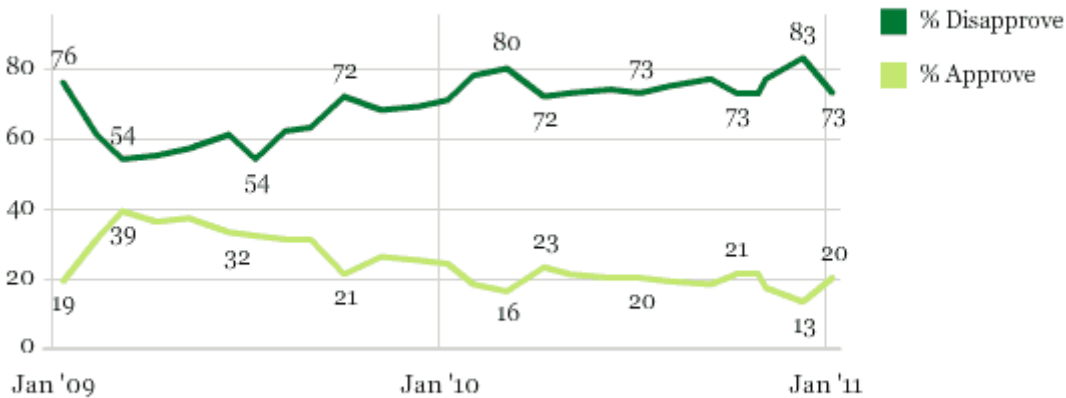
Republicans more approving than at any time in nearly two years
 January 11, 2011

PRINCETON, NJ -- Americans' approval of the job Congress is doing rose in early January to 20%, after falling to a record-low 13% in mid-December and registering 17% in November. Support for Congress had been at or near 20% from about May of last year through October.

¹⁴ http://www.gallup.com/poll/145538/Congress-Job-Approval-Rebounds.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20Politics%20-%20USA

Do you approve or disapprove of the way Congress is handling its job?

Trend since January 2009



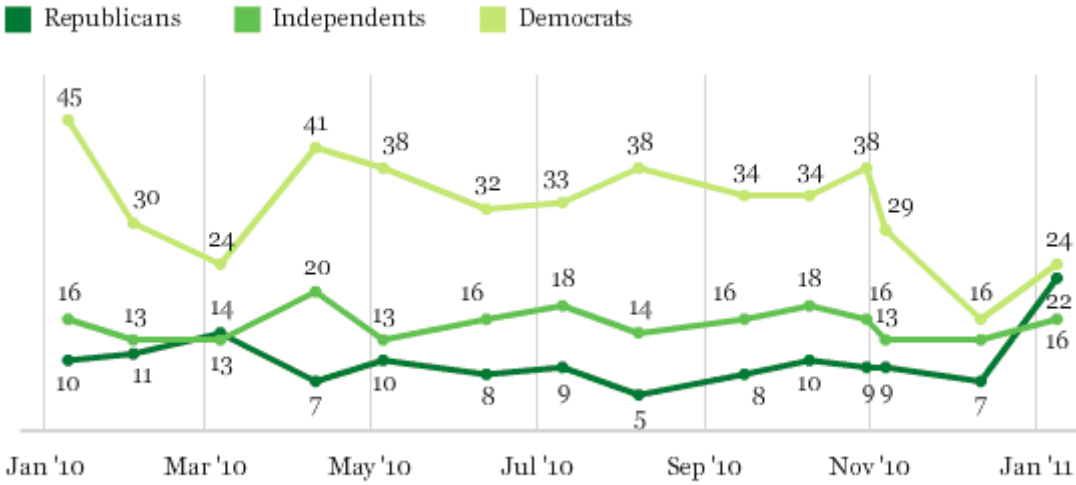
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The poll was conducted Jan. 7-9, the same weekend that Arizona Rep. Gabrielle Giffords was critically wounded by a gunman who reportedly targeted her at a constituent outreach event in Tucson. However, there is no evidence in the day-by-day results that the Saturday shootings had any effect on attitudes about Congress as a whole.

Americans' 13% approval of Congress last month was recorded shortly after President Obama and congressional Republican leaders came to agreement on a plan to extend tax cuts put in place under George W. Bush, but before Congress passed that plan and several other major bills. The record-low rating was mainly the result of a drop in approval among Democrats, who may have either disagreed with the compromise plan or been unhappy about the enhanced role Republicans were playing in the legislative process.

Republicans' approval of Congress is up since December, and the 22% currently approving is the highest in nearly two years. Approval also improved among Democrats, from 16% to 24%. Still, Democrats' approval remains significantly lower than what it was for most of 2010, clearly reflecting those partisans' diminished approval now that Republicans have majority control of the 112th Congress. Independents' approval today is similar to December and to their ratings all of last year.

Percentage Approving of Job Congress Is Doing, by Party ID -- Recent Trend



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The partisan changes in congressional approval this month are similar to the patterns seen the last two times party control of Congress changed hands. In January 2007, after a new Democratic majority was sworn in, giving Democrats control for the first time since early 1995, Gallup found approval of Congress more than doubling among Democrats -- from 16% to 39%, while approval among Republicans also rose slightly, from 32% to 37%.

Similarly, in January 1995, after Republicans took power in Congress for the first time in 40 years, approval among Republicans rose from 19% to 45%, while Democratic approval held steady at 27%.

Approval of Congress Spanning Recent Transfers of Power in Congress

	Republicans	Independents	Democrats
	+15	+3	+8
2011 Jan 7-9	22%	16%	24%
2010 Dec 10-12	7%	13%	16%
	+5	+10	+23
2007 Jan 15-18	37%	28%	39%
2006 Dec 11-14	32%	18%	16%
	+26	+4	0
1995 Jan 16-18	45%	29%	27%
1994 Dec 28-30	19%	25%	27%

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Compared with changes in approval of Congress among Republicans in 1995 and among Democrats in 2007, the recent 15-point increase in Republicans' approval is on the low side, as is their 22% approval rating of the new Congress. This likely reflects that Republicans now control only one chamber of Congress, not two, as Republicans did in 1995 and Democrats did in 2007. Additionally, overall public approval of Congress is restrained given the ongoing problems in the U.S. economy, including a battered housing market and a persistently high unemployment rate.

Survey Methods

Results for this Gallup poll are based on telephone interviews conducted Jan. 7-9, 2011, with a random sample of 1,018 adults, aged 18 and older, living in the continental U.S., selected using random-digit-dial sampling.

For results based on the total sample of national adults, one can say with 95% confidence that the maximum margin of sampling error is ± 4 percentage points..

Interviews are conducted with respondents on landline telephones (for respondents with a landline telephone) and cellular phones (for respondents who are cell phone-only). Each sample includes a minimum quota of 200 cell phone-only respondents and 800 landline respondents, with additional minimum quotas among landline respondents for gender within region. Landline respondents are chosen at random within each household on the basis of which member had the most recent birthday.

Samples are weighted by gender, age, race, education, region, and phone lines. Demographic weighting targets are based on the March 2010 Current Population Survey figures for the aged 18 and older non-institutionalized population living in continental U.S. telephone households. All reported margins of sampling error include the computed design effects for weighting and sample design.

In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.

154-15 Very Conservative Americans: Leaders Should Stick to Beliefs¹⁵

Other groups of Americans tilt more toward compromise

January 12, 2011

PRINCETON, NJ -- A majority of very conservative Americans believe political leaders in Washington should stick to their beliefs even if little is accomplished, while all other groups, particularly moderates and liberals, are more amenable to compromise for the sake of getting things done.

More Important for Political Leaders to Stick to Beliefs or Compromise?

Next, we have a question about the best approach for political leaders to follow in Washington. Where would you rate yourself on a scale of 1 to 5, where 1 means it is more important for political leaders to compromise in order to get things done, and 5 means it is more important for political leaders to stick to their beliefs even if little gets done?

	All Americans	Very conservative	Conser-vative	Moderate	Liberal	Very liberal
	%	%	%	%	%	%
5/More important to stick to beliefs	15	36	18	11	8	9
4	12	17	17	7	12	8
3	24	21	26	22	22	32
2	14	8	9	19	18	15
1/More important to compromise	33	17	27	40	39	37

USA Today/Gallup, Nov. 4-7, 2010, + Gallup, Jan. 7-9, 2011

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These data are from an aggregate of 2,039 interviews with national adults from two recent Gallup surveys -- the first conducted Nov. 4-7, 2010, and the second, Jan. 7-10, 2011. Response patterns to this question were similar in both surveys.

Americans who describe themselves as "very conservative" -- 11% of national adults -- are most different from others in their responses to the compromise versus stick-to-beliefs question. These

¹⁵ http://www.gallup.com/poll/145541/Conservative-Americans-Leaders-Stick-Beliefs.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20Politics%20-%20USA

Americans are significantly more likely than any other group to place more importance on leaders' sticking to their beliefs -- a "4" or "5" on the 5-point scale.

Americans who classify themselves as conservative but not "very" conservative, however, are about evenly divided in terms of sticking to principles (35%) versus compromising (36%). Majorities of moderates and liberals rate themselves "1" or "2" on the scale, indicating greater support for compromise among political leaders.

The differences among partisan/ideological groups reflect similar patterns. Conservative Republicans are the most likely to say leaders should stick to their principles. Democrats in all ideological groups are more likely than conservative Republicans to lean toward the "more important to compromise" position. Liberal and moderate Democrats are the least likely to favor a "stick to principles" position, while liberal Democrats are slightly more likely to choose a mid-range position on the issue than are other Democrats.

More Important for Political Leaders to Stick to Beliefs or Compromise?

Next, we have a question about the best approach for political leaders to follow in Washington. Where would you rate yourself on a scale of 1 to 5, where 1 means it is more important for political leaders to compromise in order to get things done, and 5 means it is more important for political leaders to stick to their beliefs even if little gets done?

	All Americans	Conservative Republican	Moderate/Liberal Republican	Pure independent	Conservative Democrat	Moderate Democrat	Liberal Democrat
	%	%	%	%	%	%	%
5/More important to stick to beliefs	15	25	12	17	15	11	5
4	12	20	10	7	8	6	11
3	24	27	23	29	17	18	25
2	14	8	20	9	11	18	20
1/More important to compromise	33	18	34	31	46	46	38

USA Today/Gallup, Nov. 4-7, 2010,+ Gallup, Jan. 7-9, 2011

GALLUP'

Gallup analyzed the basic relationship between party identification and responses to this question using the Nov. 4-7, 2010, data, and found Republicans more in favor of leaders sticking to their beliefs and Democrats more supportive of compromise.

Implications

Shortly after taking over control of Congress last week, Republican leaders introduced a bill to repeal the entire healthcare reform act that President Obama signed into law last March. This repeal bill is viewed as having virtually no chance of passage by the Democratically controlled Senate or of overriding a presidential veto, making it a symbolic gesture seemingly aimed at a desire to showcase beliefs rather than a serious effort to pass legislation. These actions may find favor among very conservative Americans and among conservative Republicans, groups that disproportionately tend to believe that sticking to principles should trump a desire to reach compromise.

Conservatives' relatively higher level of support for the idea that political leaders should stick to their beliefs regardless of what gets done may reflect a reaction to Democratic control of Congress, the Senate, and the White House in 2009-2010. At the same time, President Obama was able to work with Republican Senate leaders to pass compromise bills on taxes and gays in the military in the waning days of the last Congress, and to achieve Senate ratification of a nuclear arms treaty with Russia. Whether these bipartisan successes will affect how Congress acts from this point forward remains to be seen.

Survey Methods

Results for this Gallup poll are based on telephone interviews conducted Nov. 4-7, 2010 and Jan. 4-7, 2011, with a random sample of 2,039 adults, aged 18 and older, living in the continental U.S., selected using random-digit-dial sampling.

For results based on the total sample of national adults, one can say with 95% confidence that the maximum margin of sampling error is ± 3 percentage points.

Interviews are conducted with respondents on landline telephones (for respondents with a landline telephone) and cellular phones (for respondents who are cell phone-only). Each sample includes a minimum quota of 200 cell phone-only respondents and 800 landline respondents, with additional minimum quotas among landline respondents for gender within region. Landline respondents are chosen at random within each household on the basis of which member had the most recent birthday.

Samples are weighted by gender, age, race, education, region, and phone lines. Demographic weighting targets are based on the March 2010 Current Population Survey figures for the aged 18 and older non-institutionalized population living in continental U.S. telephone households. All reported margins of sampling error include the computed design effects for weighting and sample design.

In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.

134-16 Most Doubt Political Rhetoric a Major Factor in Ariz. Shootings¹⁶

Four in 10 say it was not a factor at all; 22%, a minor factor

January 12, 2011

PRINCETON, NJ -- A new *USA Today*/Gallup poll finds Americans dubious that the heated language used in politics today was a major factor that influenced the alleged gunman in last week's shootings in Tucson, Ariz. Twenty percent say such rhetoric was a major factor in the shootings, while 22% cite it as a minor factor; 42% say it was not a factor at all. Democrats are more likely than independents or Republicans to believe political debate played a role.

Just your best guess, do you think the heated language used in politics today was or was not a factor influencing the Arizona shooter to commit the attack?

[If "yes"] Do you think it was a major factor or a minor factor?

	Major factor	Minor factor	Not a factor	No opinion
All Americans	20%	22%	42%	15%
Democrats	28%	26%	27%	19%
Independents	21%	24%	43%	12%
Republicans	11%	16%	62%	11%

USA Today/Gallup, Jan. 11, 2011

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The poll was conducted Jan. 11, three days after Jared Loughner allegedly shot and killed six people in Tucson, Ariz., and seriously injured numerous others including Rep. Gabrielle Giffords. Some of the early news coverage of the shootings discussed whether the increasingly inflammatory language used in political debate today could have motivated the shooter to attack the Democratic member of Congress. That theory was put forth by the sheriff of Pima County, Ariz., who argued that conservative thought leaders like Sarah Palin use language that may encourage their supporters to commit acts of violence against their opponents.

Most Americans reject that theory, with 53% agreeing that commentators who allege conservative rhetoric was responsible were mostly attempting to use the tragedy to make conservatives look bad. Roughly one in three, 35%, say the commentators were making a legitimate point about how dangerous the language used by conservatives can be.

¹⁶ http://www.gallup.com/poll/145556/Doubt-Political-Rhetoric-Major-Factor-Ariz-Shootings.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20Politics%20-%20USA

Legitimate to Say Conservative Political Rhetoric Partly Responsible for Shooting?

As you may know, some commentators have said that well-known conservatives use language that is too inflammatory and is partly responsible for the Arizona shooting. Which comes closer to your view -- [ROTATED: it is a legitimate point about how dangerous the language used by conservatives can be (or) it is not a legitimate point but mostly an attempt to use the tragedy to make conservatives look bad]?

	A legitimate point	An attempt to make conservatives look bad	No opinion
All Americans	35%	53%	12%
Democrats	52%	35%	12%
Independents	36%	53%	11%
Republicans	15%	75%	10%

USA Today/Gallup, Jan. 11, 2011

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Though Americans doubt that the language used in political debate was a motivating factor in the shootings, they are inclined to believe all major U.S. political groups are going too far in using inflammatory language to criticize their opponents. In fact, Americans are about equally likely to say Democrats (51%) and Republicans (53%) are guilty of this. A similar percentage also believe this applies to supporters of the Tea Party movement.

Thinking more generally about the way political issues are discussed and debated in this United States today, do you think each of the following groups has or has not gone too far in using inflammatory language to criticize their political opponents? How about -- [RANDOM ORDER]?

	Yes, gone too far	No, have not	No opinion
Republicans and their supporters	53%	37%	11%
Democrats and their supporters	51%	39%	11%
Supporters of the Tea Party movement	49%	36%	15%

USA Today/Gallup, Jan. 11, 2011

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Lax Gun Laws Not Seen as a Major Cause

Usually, mass shootings result in a public discussion of the role that gun laws played in the crime, and perhaps whether tougher laws or better enforcement could have prevented it. In the Arizona case, the accused gunman passed a background check and was legally able to purchase the gun used to commit the crime, even though many believed he was mentally unstable.

However, Arizona's gun laws are somewhat weaker than those in other states; for example, the state allows its residents to carry concealed weapons without a permit.

Most Americans, though, do not believe tougher gun laws in Arizona would have prevented these shootings. One in five say stricter laws would have prevented the tragedy, while 72% disagree. Democrats, who are more likely to support gun restrictions, are also more likely to believe the shootings could have been prevented if tougher gun laws were in place, but a majority of this group still says the shootings would have occurred regardless.

From what you know about the shootings, do you think -- [ROTATED: this tragedy would have been prevented if the state of Arizona had stricter gun laws (or) this tragedy would have occurred even if the state of Arizona had stricter gun laws]?

	Would have been prevented with stricter gun laws	Would have occurred even if stricter gun laws	No opinion
All Americans	20%	72%	8%
Democrats	33%	58%	9%
Independents	19%	72%	9%
Republicans	8%	89%	3%

USA Today/Gallup, Jan. 11, 2011

GALLUP*

Gallup found almost identical responses in 2007, when Americans were asked whether stricter gun laws could have prevented the mass shootings on the campus of Virginia Tech.

Implications

Americans generally believe that the political language used in this country on all sides has become too heated, but stop short of identifying it as a major cause of the recent shooting of a Democratic congresswoman and some of her constituents. Americans also do not see weak gun laws as a major contributing factor. Though the poll did not ask about it specifically, these attitudes suggest Americans may be laying responsibility for the shootings squarely on the alleged killer, perhaps due to his reported psychological problems, rather than on larger societal factors.

Survey Methods

Results for this *USA Today*/Gallup poll are based on telephone interviews conducted Jan. 11, 2011, on the Gallup Daily tracking survey, with a random sample of 1,002 adults, aged 18 and older, living in all 50 U.S. states and the District of Columbia, selected using random-digit-dial sampling.

For results based on the total sample of national adults, one can say with 95% confidence that the maximum margin of sampling error is ± 4 percentage points.

Interviews are conducted with respondents on landline telephones (for respondents with a landline telephone) and cellular phones (for respondents who are cell phone-only). Each sample includes a minimum quota of 200 cell phone-only respondents and 800 landline respondents, with additional minimum quotas among landline respondents for gender within region. Landline respondents are chosen at random within each household on the basis of which member had the most recent birthday.

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In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.

Polls conducted entirely in one day, such as this one, are subject to additional error or bias not found in polls conducted over several days.

134-17 Americans' Overall Wellbeing Improves in 2010¹⁷

Wellbeing gains more apparent in the first half of 2010 than in the second half
January 13, 2011

WASHINGTON, D.C. -- Americans' Well-Being Index score improved to an average of 66.8 in 2010 from 65.9 in 2009 and 2008. This year-over-year increase in overall wellbeing reflects increases across five of the six key areas of wellbeing, with the largest gains in how Americans evaluate their lives overall.

¹⁷ http://www.gallup.com/poll/145568/Americans-Overall-Wellbeing-Improves-2010.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20USA%20-%20Wellbeing

Change in Americans' Wellbeing Over Time

	2008	2009	2010	Change, 2008 vs. 2009	Change, 2009 vs. 2010
Well-Being Index	65.9	65.9	66.8	0.0	0.9
Sub-Indexes					
Life Evaluation	40.8	45.8	49.8	5.0	4.0
Physical Health	76.9	76.6	76.9	-0.3	0.3
Emotional Health	79.1	78.7	79.3	-0.4	0.6
Healthy Behavior	63.7	63.0	64.1	-0.7	1.1
Basic Access	83.6	82.1	82.3	-1.5	0.2
Work Environment	51.4	49.2	48.2	-2.2	-1.0

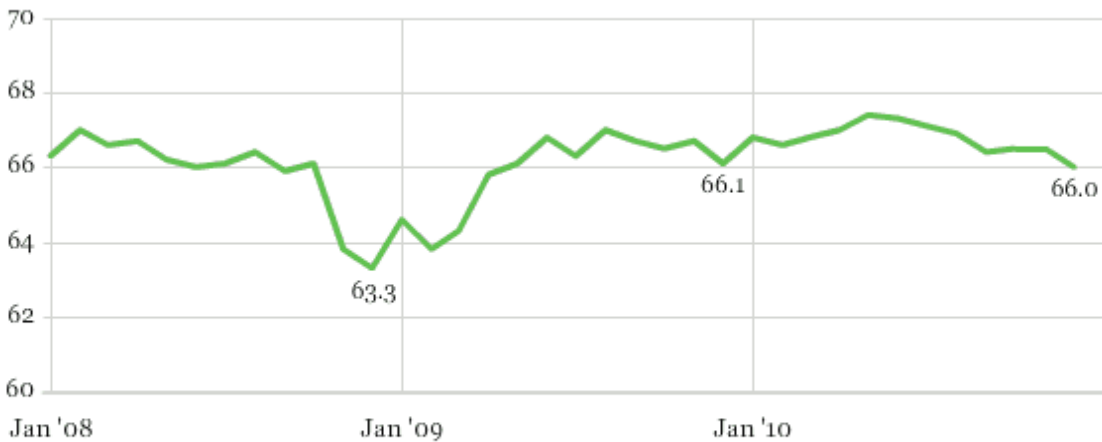
Gallup-Healthways Well-Being Index

GALLUP®

Monthly scores, however, reveal that Americans' higher level of wellbeing in 2010 resulted from relatively better scores in the first half of the year. Americans' overall wellbeing and performance in each of the six key areas of wellbeing deteriorated in the last months of 2010, dropping to match 2009 levels by year's end.

Specifically, Americans' Well-Being Index score fell to 66.0 in December, from 66.5 in November, essentially matching the 66.1 in December 2009. The monthly trend shows Americans' wellbeing has been heading downward since reaching an all-time high of 67.4 in May 2010.

Gallup-Healthways Well-Being Index Score by Month, 2008-2010



Gallup-Healthways Well-Being Index

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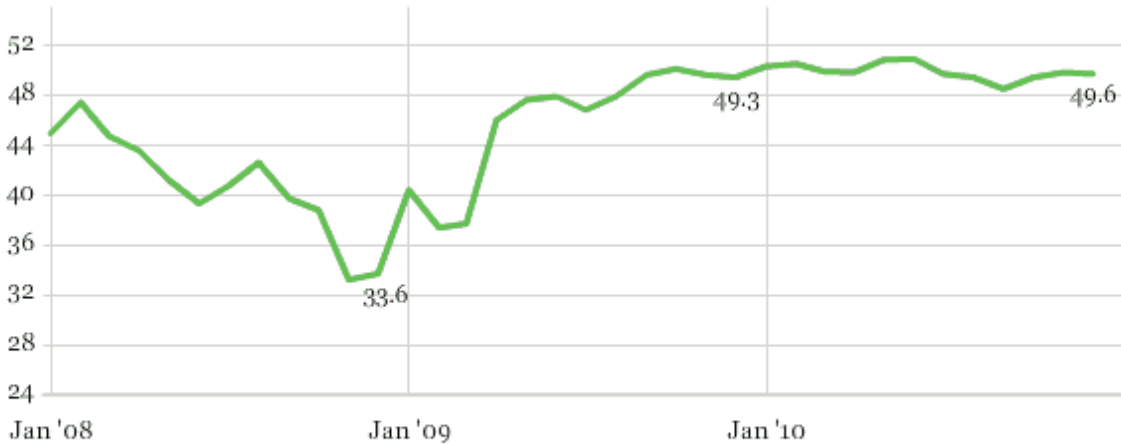
The Gallup-Healthways Well-Being Index -- a comprehensive measure of Americans' physical, emotional, and financial health -- plummeted in the fall of 2008 amid the escalating financial crisis. The Well-Being Index score dropped to an all-time low of 63.3 in December 2008, but it has since recovered to pre-economic crash levels.

The Well-Being Index tends to trend downward in the winter months as Americans exercise less, eat less healthily, and report being sick with colds and the flu more. Each of the six Well-Being Index sub-index scores in December, however, is down or about on par with the same month in 2009, revealing that Americans, on the whole, have not made sustained progress improving their wellbeing.

The following section reviews monthly trends for each sub-index.

Life Evaluation: Americans rated their lives now and in the future about the same in December 2010 (49.6) as in December 2009 (49.3), though still significantly better than in December 2008 (33.6). Americans' optimism about their lives reached new highs earlier in 2010 as economic conditions in the United States began to improve, but dropped slightly in the final months of the year.

Life Evaluation Sub-Index Score by Month, 2008-2010

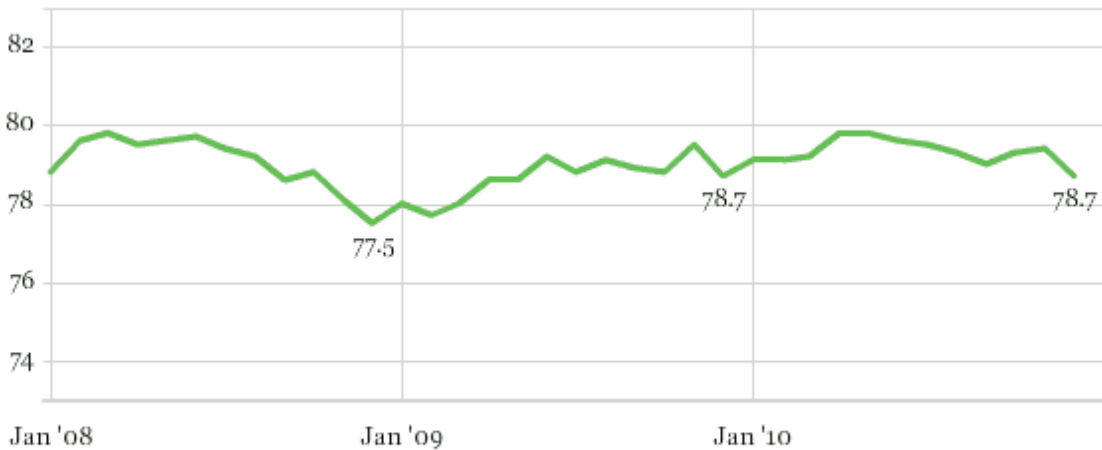


Gallup-Healthways Well-Being Index

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Americans' **Emotional Health** score of 78.7 in December exactly matches the December 2009 score, revealing that Americans are no happier or less stressed or worried than they were a year ago.

Emotional Health Sub-Index Score by Month, 2008-2010



Gallup-Healthways Well-Being Index

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The **Healthy Behavior** sub-index -- a measure of Americans' eating, exercise, and smoking habits -- was 61.1 in December, exactly matching the score from December 2009. Americans' healthy behaviors improved in 2010 after declining in late 2008 and remaining down throughout much of 2009. While healthy behaviors are particularly susceptible to seasonal issues, and the

December 2010 numbers reflect the same end-of-year downturn found in the previous two years, the lack of year-over-year progress highlights Americans' struggle to exercise more frequently, eat better foods, and smoke less.

Healthy Behavior Sub-Index Score by Month, 2008-2010

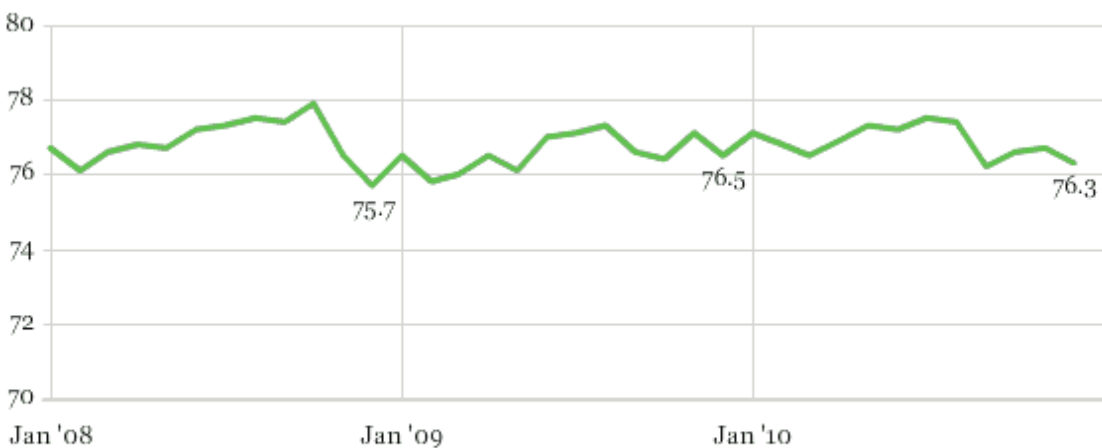


Gallup-Healthways Well-Being Index

GALLUP®

The **Physical Health** sub-index -- which includes chronic conditions and daily illnesses like flu and cold -- is about the same in December 2010 as it was in the same month in 2009. Americans' physical health, similar to their healthy behaviors, improved throughout much of 2010 after worsening in 2009. This progress, however, was not sustained in the last part of 2010.

Physical Health Sub-Index Score by Month, 2008-2010

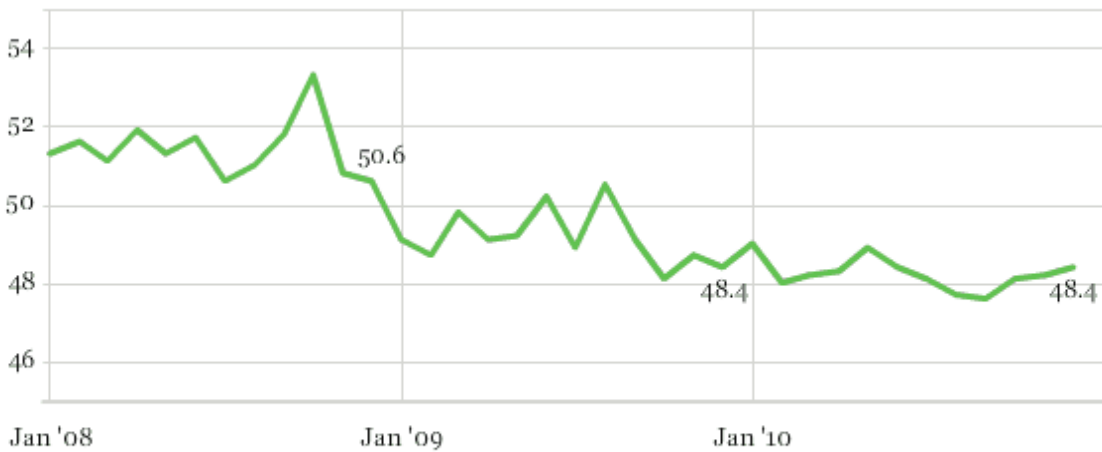


Gallup-Healthways Well-Being Index

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The **Work Environment** sub-index, which gauges Americans' perceptions of their workplace and job quality, has been down -- or at best on par -- every month in 2010 compared with 2009 and is far below where it was in 2008. The decline in work environment scores is tied to one item in particular: Americans are significantly less likely now to say they are satisfied with their job or the work they do than they were before the financial crash.

Work Environment Sub-Index Score by Month, 2008-2010

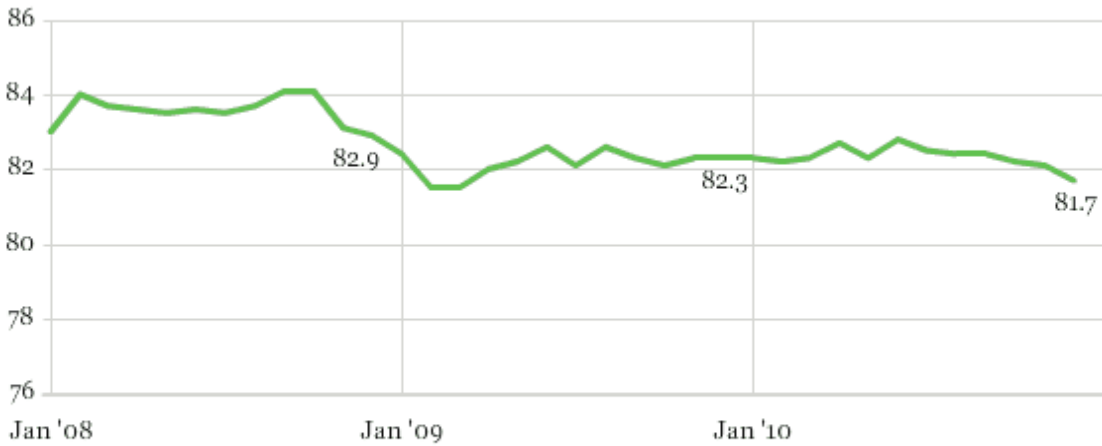


Gallup-Healthways Well-Being Index

GALLUP

Americans' access to **basic necessities** -- which include medical care, food, shelter, and safety -- dropped to 81.7 in December, from 82.1 in November, falling below the score for the same month in 2009. Although Americans reported greater access to basic necessities in the first half of 2010 compared with 2009, the measure declined throughout the last half of the year and is still yet to recover to 2008 levels.

Basic Access Sub-Index Score by Month, 2008-2010



Gallup-Healthways Well-Being Index

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Bottom Line

Americans' wellbeing on an aggregate basis improved in 2010. Reviewing wellbeing scores month by month, however, reveals a more complex picture of last year. Americans in the beginning of 2010 made strides toward better health habits, became more optimistic about their lives, and reported improved emotional and physical health. But, the gains made in these areas deteriorated in the latter months of 2010.

While Americans' life evaluations, healthy behaviors, and emotional health have clearly recovered post-recession, access to basic necessities and perceptions toward the workplace continue to lag behind pre-economic crisis levels. The lack of recovery in these areas, which provide a measure of two key problems that the recession brought on -- lower incomes at the individual and community level and a reduced number of high-quality jobs -- highlights the still deeply entrenched effects of the housing market crash and ensuing financial meltdown.

About the Gallup-Healthways Well-Being Index

The Gallup-Healthways Well-Being Index tracks U.S. wellbeing and provides best-in-class solutions for a healthier world. To learn more, please visit well-beingindex.com.

Survey Methods

Results are based on telephone interviews conducted as part of the Gallup-Healthways Well-Being Index survey Jan. 2, 2008-Dec. 31, 2010, with a random sample of 352,840 adults, aged 18 and older, living in all 50 U.S. states and the District of Columbia, selected using random-digit-dial sampling.

For results based on the total sample of national adults, one can say with 95% confidence that the maximum margin of sampling error is ± 1 percentage point.

Interviews are conducted with respondents on landline telephones and cellular phones, with interviews conducted in Spanish for respondents who are primarily Spanish-speaking. Each daily sample includes a minimum quota of 200 cell phone respondents and 800 landline respondents, with additional minimum quotas among landline respondents for gender within region. Landline respondents are chosen at random within each household on the basis of which member had the most recent birthday.

Samples are weighted by gender, age, race, Hispanic ethnicity, education, region, adults in the household, cell phone-only status, cell phone-mostly status, and phone lines. Demographic weighting targets are based on the March 2010 Current Population Survey figures for the aged 18 and older non-institutionalized population living in U.S. telephone households. All reported margins of sampling error include the computed design effects for weighting and sample design.

In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.

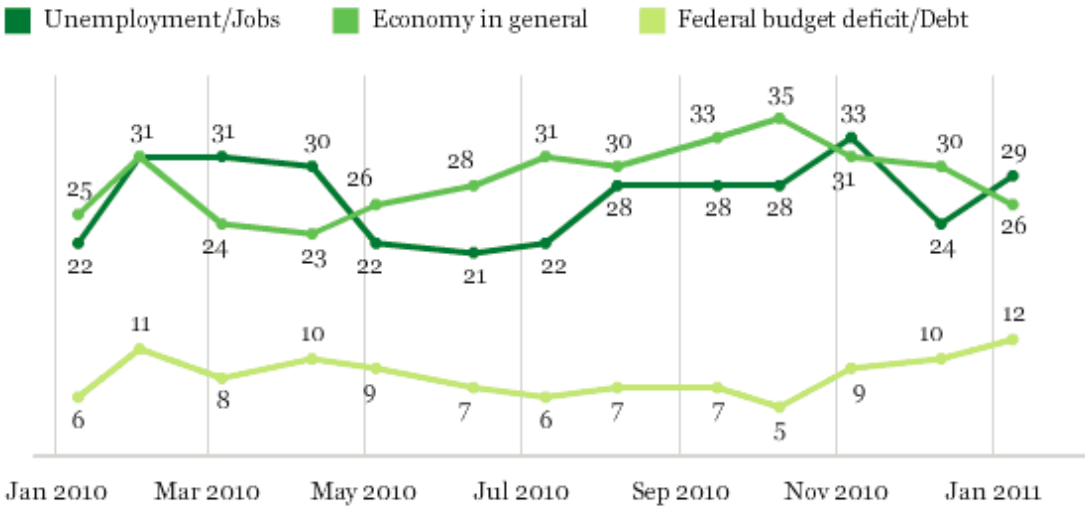
15-18 In U.S., Jobs Are Top Problem, While New High Cite Deficit¹⁸

Mentions of the economy in general have trended downward since October January 13, 2011

PRINCETON, NJ -- Americans say unemployment is the No. 1 problem facing the United States at the start of 2011, with 29% naming it. Mentions of "the economy" in general as the leading problem have been trending downward since October, and the current 26% reading is the lowest since May. At the same time, focus on the federal deficit has been edging up, and, although similar to the rate mentioning it last February, the 12% of Americans citing it this month is numerically the highest Gallup has recorded in at least a decade.

¹⁸ http://www.gallup.com/poll/145571/Jobs-Top-Problem-New-High-Cite-Deficit.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20Politics%20-%20USA

Most Important Problem -- Trends in Key Problems Since January 2010



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Gallup first asked the Most Important Problem question in 1939 and has repeated it at least annually almost every year since, establishing monthly updates in 2001. Assessing the long-term trend for the federal budget deficit is difficult because prior to 2001, Gallup combined responses for the deficit with those for the federal budget generally. While in some cases those responses may be comparable, in others -- such as in 1990 and 1996 -- public concern about congressional budget battles was highly distinct from the deficit-specific concerns of today.

The latest update, conducted Jan. 7-9, 2011, finds 68% of Americans naming at least one economic issue and 50% naming at least one non-economic issue as the top problem. The survey was conducted the weekend of the Arizona incident in which six Americans were killed, and Rep. Gabrielle Giffords and several others were critically wounded, in a shooting rampage. However, it may have been too soon for the survey to measure any resulting changes in Americans' perceptions of the nation's top problem -- such as, perhaps, increases in concern about gun violence.

The leading economic problems named this month are unemployment, the economy, and the federal deficit/debt, followed by lack of money (4%), fuel prices (3%), and taxes (2%). Despite the rising cost of gas in recent months, with average U.S. pump prices in December exceeding \$3 per gallon for the first time since October 2008, public mentions of fuel prices have yet to increase significantly. This bears watching in 2011, as mentions of gas prices as the top problem rose to 25% in June 2008, when pump prices exceeded \$4.

The top non-economic issue this month is healthcare, but the 13% naming it is half the peak level seen in 2009 prior to passage of President Barack Obama's healthcare reform plan. Dissatisfaction with government, including mentions of corruption and poor leadership by the Congress and the president, is mentioned by 11%. Fewer name immigration (6%) or war in general (5%).

Perceived Most Important Problems Facing the U.S.

What do you think is the most important problem facing this country today?

	Jan 7-9, 2011
	%
ECONOMIC PROBLEMS (NET)	68
Unemployment/Jobs	29
Economy in general	26
Federal budget deficit/Federal debt	12
Lack of money	4
Fuel/Oil prices	3
Taxes	2
NON-ECONOMIC PROBLEMS (NET)	50
Poor healthcare/hospitals; high cost of healthcare	13
Government/Congress/Politicians	11
Immigration/Illegal aliens	6
Wars/War (nonspecific)/Fear of war	5
Ethics/Moral/Religious/Family decline; dishonesty	3
Education/Poor education/Access to education	3
Lack of respect for each other	2
Poverty/Hunger/Homelessness	2
Foreign aid/Focus overseas	2
Terrorism	2

Issues mentioned by at least 2% of Americans

Results add to more than 100% due to multiple responses.

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Perhaps simplifying matters for Obama and the new Congress as they set priorities for the coming legislative agenda, Gallup finds relatively little partisan disagreement among Americans about the nation's top problems. Unemployment and the economy rank as the top two most important problems for both Republicans and Democrats. These political groups (each of which includes independents who lean toward that party) also largely agree on the next three problems - healthcare, the federal budget deficit/debt, and government -- although the federal budget deficit/debt garners significantly more mentions from Republicans, among whom the issue ranks third, than it does from Democrats, for whom it is fifth.

Top Six Most Important Problems -- by Party ID

Issues listed in order of national adult results

	Republican/ Lean Republican	Democrat/ Lean Democrat
	%	%
Unemployment/Jobs	27	33
The economy in general	28	29
Healthcare	11	14
Federal budget deficit	19	7
Government/Congress/Politicians	6	9
Immigration	9	3

Jan. 7-9, 2011

GALLUP®

In some cases, regional differences are greater than partisan ones. This is especially evident for immigration, which 10% of Americans living in the West cite as the top problem, compared with 3% in the East, 4% in the South, and 6% in the Midwest.

Bottom Line

Americans continue to view the economy as one of the nation's leading problems, but they put slightly less emphasis on it today than they did last fall. At the same time, the percentage of Americans citing unemployment has remained high and the percentage citing the federal budget deficit has expanded. The deficit is now a more prominent public concern than it was for most of last year, and this could have important implications for how much President Obama emphasizes the issue in his State of the Union address and the 2012 budget he prepares for Congress.

Survey Methods

Results for this Gallup poll are based on telephone interviews conducted Jan. 7-9, 2011, with a random sample of 1,018 adults, aged 18 and older, living in the continental U.S., selected using random-digit-dial sampling.

For results based on the total sample of national adults, one can say with 95% confidence that the maximum margin of sampling error is ± 4 percentage points.

Interviews are conducted with respondents on landline telephones (for respondents with a landline telephone) and cellular phones (for respondents who are cell phone-only). Each sample includes a minimum quota of 200 cell phone-only respondents and 800 landline respondents, with additional minimum quotas among landline respondents for gender within region. Landline

respondents are chosen at random within each household on the basis of which member had the most recent birthday.

Samples are weighted by gender, age, race, education, region, and phone lines. Demographic weighting targets are based on the March 2010 Current Population Survey figures for the aged 18 and older non-institutionalized population living in continental U.S. telephone households. All reported margins of sampling error include the computed design effects for weighting and sample design.

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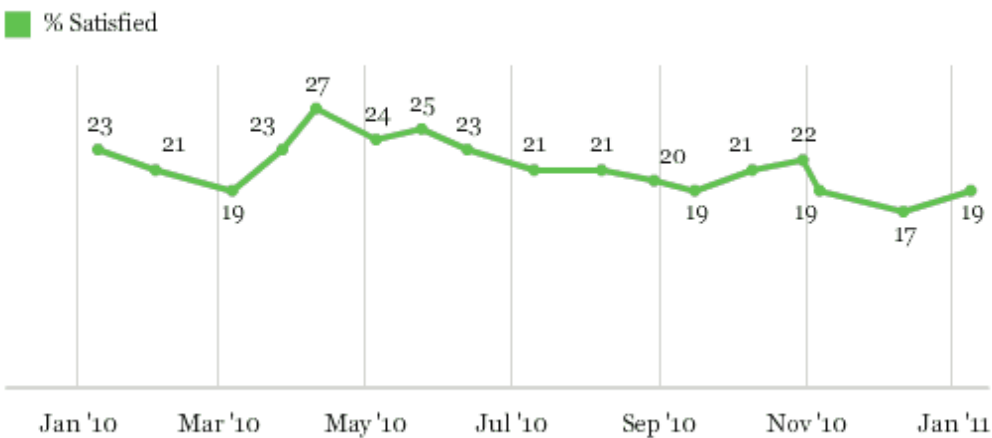
134-19 U.S. Satisfaction Remains Near 12-Month Low¹⁹

Despite their party's winning House control, Republicans' satisfaction lower than Democrats'

January 14, 2011

WASHINGTON, D.C. -- Gallup finds 19% of Americans satisfied with the way things are going in the United States at this time -- essentially on par with the lowest level of the past 12 months, 17%, registered in December.

Satisfaction With the Way Things Are Going in the United States



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While satisfaction with the direction of the country remains stagnant, the same Jan. 7-9 poll found that Americans' approval of Congress increased to 20% from a record low of 13% in December, during the lame-duck session. This slight disconnect may reveal that Americans are

¹⁹ http://www.gallup.com/poll/145610/Satisfaction-Remains-Near-Month-Low.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas - Northern America - Politics - USA

hopeful about what the new Congress can accomplish, but still perceive significant problems in the United States in general.

The current low level of satisfaction is likely tied primarily to the economy. When U.S. satisfaction reached an all-time high of 71% in February 1999, 6% of Americans named the economy as the most important problem facing the country. When satisfaction fell to an all-time low of 7% in October 2008 -- amid the escalating financial crisis -- 47% said the economy was the most important problem. In the Jan. 7-9 poll, 26% choose the economy as the nation's No. 1 problem, and another 29% mention unemployment.

Despite GOP House Takeover, Republicans' Satisfaction Lower Than Democrats'

Although the poll was conducted after the new Republican-controlled House came to power last week, 13% of Republicans say they are satisfied with the way things are going in the United States, far fewer than the 27% of Democrats who say the same. Sixteen percent of independents are satisfied.

Similarly, conservatives are less than half as likely as liberals to be satisfied with the direction of the nation -- 12% vs. 27%.

*Satisfaction With the Way Things Are Going in the United States,
by Political Party Affiliation and Ideology*

	Satisfied
Republicans	13%
Independents	16%
Democrats	27%
Conservatives	12%
Moderates	23%
Liberals	27%

Gallup, Jan. 7-9, 2011

GALLUP®

Although their party now controls one house of Congress, as long as Democrats remain in control of the White House, Republicans' satisfaction is likely to remain lower than Democrats'. When President Obama took office in late January 2009, Democrats' satisfaction increased, and has remained higher than Republicans' since. Historical Gallup trends document a similar rise in satisfaction among the new president's party when George W. Bush, Bill Clinton, and Ronald Reagan took office, and this pattern of elevated satisfaction persisted throughout their presidencies.

Given that U.S. satisfaction is directly related to perceptions of the economy, improvements in the economic situation in the country in general would likely increase satisfaction across party

and ideological lines. Thus, it is highly unlikely that even with an economic upturn, Republicans' satisfaction would eclipse Democrats' in the near term.

Survey Methods

Results for this Gallup poll are based on telephone interviews conducted Jan. 7-9, 2011, with a random sample of 1,018 adults, aged 18 and older, living in the continental U.S., selected using random-digit-dial sampling.

For results based on the total sample of national adults, one can say with 95% confidence that the maximum margin of sampling error is ± 4 percentage points.

Interviews are conducted with respondents on landline telephones (for respondents with a landline telephone) and cellular phones (for respondents who are cell phone-only). Each sample includes a minimum quota of 150 cell phone-only respondents and 850 landline respondents, with additional minimum quotas among landline respondents for gender within region. Landline respondents are chosen at random within each household on the basis of which member had the most recent birthday.

Samples are weighted by gender, age, race, education, region, and phone lines. Demographic weighting targets are based on the March 2010 Current Population Survey figures for the aged 18 and older non-institutionalized population living in continental U.S. telephone households. All reported margins of sampling error include the computed design effects for weighting and sample design.

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154-20 Views of Gun Control -- A Detailed Demographic Breakdown²⁰

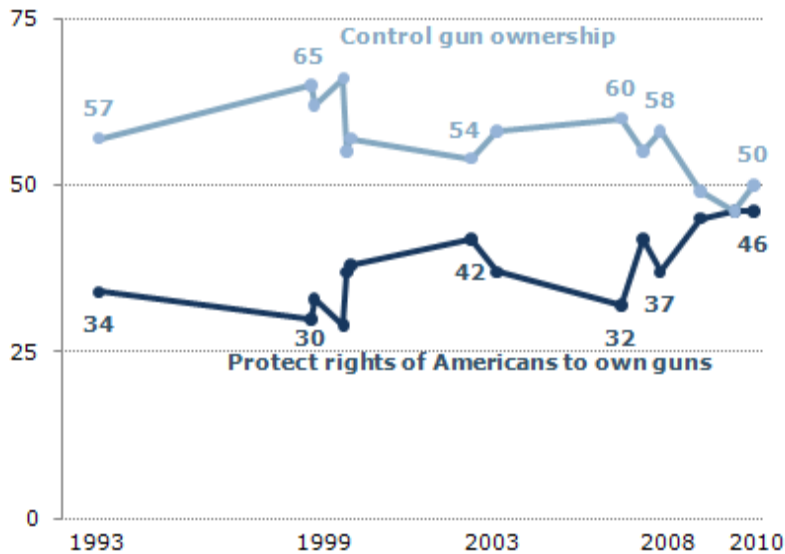
January 13, 2011

In the wake of last weekend's shootings in Tucson, Ariz., the issue of gun control and gun rights has returned to national prominence.

The Pew Research Center has tracked attitudes about this issue since 1993. In September, public opinion was divided: 50% said it was more important to control gun ownership while 46% said it was more important to protect the rights of Americans to own guns.

²⁰ <http://pewresearch.org/pubs/1858/gun-control-rights-division-demographics-party-ideology-religion-region-tea-party>

Public Divided About Gun Control



PEW RESEARCH CENTER

Opinion about gun control has been split since April 2009, but this marked a substantial change in attitudes from previous years. From 1993 through 2008, majorities of Americans consistently prioritized gun control over gun rights, with a particular uptick in support for gun control following the Columbine High School shooting in 1999 (a few months after that incident 62% said controlling gun ownership was more important than protecting gun rights). More recently, just a few days after the 2007 shooting at Virginia Tech, 60% said gun control was more important.

There are substantial demographic differences of opinion on this issue, including by gender, race, party and geography. [Click here to see a breakdown of opinion about gun control across the following categories:](#)

- Sex
 - Age
 - Race
 - Education
 - Income
 - Marital status
 - Party
 - Party and Ideology
 - Religious Preference
 - Region
 - Detailed Region
 - Urbanicity
 - Tea Party support
-

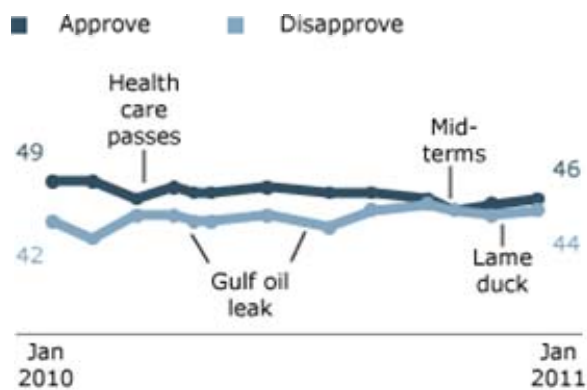
184-21 Obama Ratings Remain Rock Steady²¹

Moderate Republicans Less Happy with Party Leaders

January 13, 2011

Overview

Neither the trouncing of the Democratic Party in the midterm elections nor the surprising legislative accomplishments of the "lame duck" Congress has had a measurable effect on opinions of Barack Obama. The president's approval ratings have been rock steady since late August and his personal image has changed very little since the middle of last year.



Currently, 46% say they approve of how Obama is handling his job while 44% disapprove. The public is similarly divided on other general measures of his job performance. One-in-four (25%) think that in the long run, Obama will be a successful president, while about the same number (26%) believes that he will be unsuccessful. And 47% think that Obama's accomplishments will be good for the country in the long run, compared with 42% who do not.

At a comparable point in his presidency, the public took a less negative view of Ronald Reagan's accomplishments; in January 1983, 50% said the things he had done would be good for the country compared with 31% who said they would be bad.

However, Americans are more upbeat about Obama's presidency than they were about Bill Clinton's two years into his first term. In February 1995, just 18% thought Clinton would be a successful president while nearly twice as many (34%) said he would be unsuccessful.

²¹ <http://pewresearch.org/pubs/1856/obama-approval-steady-gop-congressional-leadership-less-popular-tea-party-influence>

Obama's Job Ratings, Personal Image Little Changed

	Jan 2010	Jun 2010	Jan 2011	Jun-Jan change
<i>Job approval ...</i>	%	%	%	
Overall job	49	48	46	-2
<i>Approval on issues ...</i>				
Threat of terrorism	51	--	55	--
Energy policy	45	45	46	+1
Iraq	45	45	46	+1
Health care	38	42	45	+3
Afghanistan	45	45	44	-1
Dealing with Iran	--	--	42	--
Tax policy	--	--	42	--
Economy	42	43	42	-1
Dealing with China	--	--	39	--
Immigration policy	30	33	35	+2
Budget deficit	32	35	35	0
<i>Personal image ...</i>				
Stands up for what he believe in	--	--	77	--
Good communicator	83	77	75	-2
Warm and friendly	77	68	70	+2
Well informed	69	67	64	-3
Cares about people	64	60	60	0
Trustworthy	61	58	58	0
Able to get things done	57	55	54	-1
Strong leader	62	53	53	0

PEW RESEARCH CENTER Jan. 5-9, 2011; Jan. 6-9, 2011 Omnibus.

The latest national survey by the Pew Research Center for the People & the Press, conducted Jan. 5-9 among 1,503 adults, was largely completed before the Jan. 8 shootings in Tucson that killed six people and left Rep. Gabrielle Giffords critically wounded. The survey finds that while the public is divided over Obama's job performance, his personal image remains on balance positive.

Solid majorities continue to characterize the president as a good communicator (75%), warm and friendly (70%), well-informed (64%), as caring about people like them (60%), trustworthy (58%), and able to get things done (54%). And on balance, more say Obama is a strong leader (53%) than say he is not (41%).

One area of relative consensus is that Obama sticks to his convictions. By an overwhelming 77%-to-16% margin, Obama is seen as "someone who stands up for what he believes in." This view is shared by 89% of Democrats (including nearly identical percentages of liberals and non-liberals), 79% of independents and 67% of Republicans.

Ratings of Obama's performance across a range of specific issues are less glowing. Most approve of his handling of terrorist threats and a narrow plurality gives him the nod when it comes to

energy policy. But public reactions are mixed across a host of other issues -- his handling of Iraq, Afghanistan, Iran and China internationally, and his handling of health care and tax policy domestically. And substantially more disapprove than approve of Obama's handling of the economy, the budget deficit and immigration policy.

Moderate Republicans Less Happy with Party Leaders

<i>View of Republican leaders' policies and plans for the future</i>	Nov 2010	Jan 2011	Change
	%	%	
Approve	41	34	-7
Disapprove	37	43	+7
Don't know	<u>22</u>	<u>22</u>	
	100	100	
<i>Approval among...</i>			
Conservative Republican	78	75	-3
Mod/Lib Republican	78	57	-21
Independent	39	30	-9
Cons/Mod Democrat	14	14	0
Liberal Democrat	10	12	+2

PEW RESEARCH CENTER Jan. 5-9, 2011. Q3. Figures may not add to 100% because of rounding.

While Obama's overall job performance measure has held steady since the midterm elections, this has not been the case for Republican congressional leaders. The new survey finds the public disapproving of their policies and plans for the future by a 43%-to-34% margin. Just two months ago, in a poll taken days after the election, the public had a more positive view: 41% approved, 37% disapproved.

Changing views of the GOP's policy agenda are most noticeable among moderate and liberal Republicans, who approved of party leaders' plans by 78% to 3% in November. Today, 57% of moderate and liberal Republicans approve while 22% disapprove. Independents, too, have grown more dissatisfied with the GOP's direction; shortly after the election, about as many independents approved (39%) as disapproved (35%) of the GOP's plans and policies for the future. Today, 30% approve while 45% disapprove.

The public continues to say they want Obama and Republican leaders to work together, but there is considerable skepticism that this will occur. About six-in-ten (61%) say GOP leaders should try to work with Obama to accomplish things, even if it means disappointing some groups of Republican supporters. A similar percentage (65%) says Obama should do the same in working with Republicans.

But by roughly two-to-one (63% to 30%), most Americans think Republicans and Democrats will end up bickering and opposing one another more than usual this year. This is a far more pessimistic view than the public expressed two years ago. Shortly before Obama took office in January 2009, just 39% predicted increased partisanship, while half (50%) thought Republicans and Democrats would work together more than usual over the course of that year.

Tea Party Republicans Continue to Resist Compromise

	<i>Rep/Rep Leaners</i>		
	All	Agree w/ Tea Party	No Opinion/Disagree
<i>GOP leaders should...</i>	%	%	%
Work with Obama	38	24	51
Stand up to Obama	58	72	46
Don't know	4	4	3
	100	100	100

	<i>Dem/Dem Leaners</i>		
	All	Liberal	Mod/Cons
<i>Obama should...</i>	%	%	%
Work with Republicans	47	46	48
Stand up to Republicans	47	49	46
Don't know	6	5	6
	100	100	100

PEW RESEARCH CENTER Jan. 5-9, 2011. Q41F1, Q42F2. Figures may not add to 100% because of rounding.

On balance, most (58%) Republicans and Republican-leaning independents continue to say that their party's leadership should "stand up to Obama" this year, but there is a sharp division of opinion within the party base. Republicans who agree with the Tea Party movement favor standing up to Obama by three-to-one (72% vs. 24% who want to work with Obama). Republicans who disagree or have no opinion about the Tea Party are divided: 51% say GOP leaders should try to work with Obama, while 46% say they should stand up to Obama.

Asked about the influence of members of Congress who support the Tea Party, most Americans (55%) say either they will not have an effect (39%) or offer no opinion (16%). Of those offering an opinion, more say lawmakers who support the Tea Party will have a positive effect (27%) than a negative one (18%).

Tea Party in a Word

April, 2010	January, 2011
Great	Good
Interesting	Radical
Patriotic	Crazy
Good	OK
Ridiculous	Ridiculous

PEW RESEARCH CENTER Jan 5-9, 2011. QA. Most frequent one-word descriptions of the Tea Party.

In general, the Tea Party has as many opponents as supporters; 24% say they agree with the Tea Party movement, 22% say they disagree. In March of last year, when the Pew Research Center first measured views of the movement, the same percentage said they agreed with the Tea Party movement, but fewer (14%) disagreed.

Asked to describe the Tea Party in a single word, respondents offer a range of descriptors. The most frequently used words are *good*, *radical*, *crazy*, *OK* and *ridiculous*. In April of last year, the top five words used were *great*, *interesting*, *patriotic*, *good* and *ridiculous*.

Few Americans Blame Political Climate for Arizona Shooting²²

(01/11/11) -

More than a third of respondents expect more events similar to the Arizona shooting to happen in America over the next few months.

Many Americans are following news stories related to the shooting that took place in Arizona just a few days ago, and more than half believe that the incident is not related to the current political climate in the United States, a new Vision Critical poll has found.

In the online survey of a representative sample of 1,008 American adults, 73 per cent of respondents say they are following news related to the shooting “very closely” or “moderately closely.”

The shooting took place near Tucson, Arizona, on Jan. 8, as Congresswoman Gabrielle Giffords held a meeting with constituents. A 22-year-old man, Jared Lee Loughner, faces five federal charges, including the attempted assassination of Giffords.

A majority of respondents (51%) believe the shooting is the result of an individual’s actions and should be regarded as an isolated incident, while a smaller proportion (31%) think the shooting is the result of the current negative tone of politics in America.

However, more than a third of Americans (37%) say they expect more events similar to the Arizona shooting to happen in the U.S. over the next few months.

President Barack Obama gets good marks for his handling of the aftermath of the Arizona shooting, with 56 per cent of respondents saying they are satisfied with his actions. The Media in America gets a slightly lower rating, with 50 per cent voicing satisfaction with the way it has covered the incident.

Views on Gun Laws

This Vision Critical survey asked the same questions that were included in an Angus Reid study on gun laws in June 2010. In all, 85 per cent of Americans say that the Second Amendment guarantees the rights of individuals to keep and bear arms, while only eight per cent disagree with this assessment.

Across the country, 45 per cent of respondents say they are satisfied with existing federal regulations related to firearm ownership, while 41 per cent are dissatisfied. Half of Americans (50%) say they would prefer to have stricter firearms laws—including 65 per cent of Democrats and 51 per cent of Independents. About one-in-four respondents (27%) would retain the existing regulations, including two-in-five Republicans (44%).

²² <http://www.angus-reid.com/polls/43741/few-americans-blame-political-climate-for-arizona-shooting/>

While Americans continue to reject the possibility of semi-automatic firearms being available for every American who is eligible to own firearms (only 23% support this idea), more than two-thirds believe that handguns (70%) and rifles or shotguns (73%) should remain legal.

On the question of concealed carry—where states have enacted different regulations—almost half of respondents (47%) agree with the notion that citizens should be granted a permit to carry a concealed weapon if they meet specific criteria laid out in the law. Fewer Americans are in favour of banning people from carrying concealed weapons (24%), issuing permits based on the recommendation of local authorities (16%), or allowing people to carry concealed weapons without a permit (9%).

Analysis

When this survey's responses are compared with the findings of the June 2010 survey, there is very little fluctuation on the way Americans feel about firearms regulations. The interpretation of the Second Amendment remains practically universal, and the "shall-issue" approach for carrying firearms in public—which entails granting permits under specific legal criteria—continues to be the most popular option across the country. The only noticeable change comes from Independents, whose support for stricter firearms regulations has increased by ten points.

Republicans and Independents are definitely more likely than Democrats to look at the events of Jan. 8 as an isolated incident. However, about two-in-five Democrats and Independents expect similar events to happen in the United States, compared to three-in-ten Republicans. The thesis that the current political climate led to the Arizona shooting is rejected by a majority of Americans, who point the finger solely at the alleged perpetrator.

Methodology: From January 10 to January 11, 2011, Vision Critical conducted an online survey among 1,008 American adults who are Springboard America panelists. The margin of error—which measures sampling variability—is +/- 3.1%. The results have been statistically weighted according to the most current education, age, gender and region Census data to ensure a sample representative of the entire adult population of the United States. Discrepancies in or between totals are due to rounding.

15423 Conservatives Drop Back, Lead Liberals by Six Points in Canada²³

01/12/11) -

Electoral race tightens dramatically in Ontario, with Tories and Grits separated by just two points.

The Conservative Party is holding on to the top spot in Canada, but has lost points in the new year, a new Vision Critical / Angus Reid poll has found.

In the online survey of a representative national sample of 1,008 Canadian adults, 34 per cent of respondents (-3 since December) would support the governing Conservative Party in the next federal election.

²³ <http://www.angus-reid.com/polls/43747/conservatives-drop-back-lead-liberals-by-six-points-in-canada/>

The Liberal Party is second with 28 per cent (+2), followed by the New Democratic Party (NDP) with 17 per cent (-1), the Bloc Québécois with 11 per cent (+1), and the Green Party with eight per cent (+1).

While the Tories and the NDP are now below their final tally in the 2008 election, the Grits, the Bloc and the Greens are ahead of their result in the last federal ballot.

Regional Breakdowns

The Tories maintain their dominance in Alberta (65%) and Manitoba and Saskatchewan (44%). In British Columbia, two-in-five decided voters would support the governing party (42%), followed by the NDP (25%) and the Liberals (21%).

The biggest change has come in Ontario, where the 13-point Tory lead observed in December has become a statistical tie (Conservatives 38%, Liberals 36%). In Quebec, the Bloc remains ahead with 43 per cent, followed by the three federalist parties (Lib. 22%, NDP 15%, Con. 13%).

Support for the Liberals is practically the same among men (29%) and women (27%), while a noticeable gender gap continues with the Tories. Almost two-in-five decided male voters (38%) would cast a ballot for the Conservative candidate in their riding, but only 29 per cent of women would join them.

The Conservatives dominate with voters aged 55 and over (42%), but are now tied with the Liberals among voters aged 35 to 54 (both at 32 per cent).

Approval and Momentum

There was little movement in these questions, with Conservative leader and Prime Minister Stephen Harper maintaining an approval rating of 26 per cent. NDP leader Jack Layton gained a point to tie Harper at 26 per cent, while Liberal Party and Official Opposition leader Michael Ignatieff dropped to 12 per cent. Layton keeps the best momentum score of the three leaders at -3, followed by Harper with -18 and Ignatieff with -20.

Legislatures

Overall approval for the House of Commons fell by six points since December to 27 per cent, with disapproval rising four points to 47 per cent. The Senate keeps lower numbers, with just 18 per cent of respondents (-5 since December) approving of its actions. One-in-four Canadians (25%) are satisfied with the way their provincial legislature is performing, down five points in a month.

Analysis

The start of 2011 did not provide a boost to the Conservative Party, with a noticeable drop across the country and in Ontario—the key battleground for the next federal election. The current gender and age gaps would not allow the Tories to get a majority mandate in a snap election.

The Liberals are performing better than in 2008, but the approval rating for Michael Ignatieff remains low. The NDP has not reached the 20 per cent mark since July, and is having a difficult time connecting with middle-aged voters. The two parties that did better this month are the Bloc and the Greens, particularly among young voters.

Methodology: From January 7 to January 9, 2011, Vision Critical conducted an online survey among 1,008 randomly selected Canadian adults who are Angus Reid Forum panelists. The margin of error—which measures sampling variability—is +/- 3.1%, 19 times out of 20. The results have been statistically weighted according to the most current education, age, gender and region Census data to ensure a sample representative of the entire adult population of Canada. Discrepancies in or between totals are due to rounding.

15-25 Strengthen Ties with China, But Get Tough on Trade²⁴

January 12, 2011

As President Obama prepares to host Chinese President Hu Jintao next week, Americans increasingly see Asia as the region of the world that is most important to the United States.

Asia Seen as Increasingly Important; Europe Less So

	Sep 1993	Sep 1997	Sep 2001	Jan 2011
Area most important to U.S.?	%	%	%	%
Asia	31	31	34	47
Europe	50	49	44	37
Equally important	8	6	9	7
Don't know	<u>10</u>	<u>14</u>	<u>13</u>	<u>9</u>
	100	100	100	100

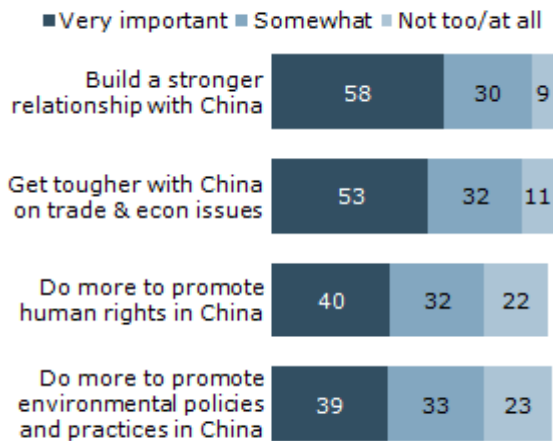
PEW RESEARCH CENTER Jan 5-9, 2011. Q21F2. Figures may not add to 100% because of rounding. In Sept. 2001 and before Asia was read as "Japan and the Pacific rim nations of Asia." In 1993 Europe was read as "the friendly nations of Europe."

Nearly half (47%) say Asia is most important, compared with just 37% who say Europe, home to many of America's closest traditional allies.

Views on this issue have changed considerably over the last decade. In an early September 2001 poll, 44% said our political, economic and military ties to Europe were more important, while 34% prioritized our ties to Asia. Similarly, in polls conducted in 1993 and 1997 about half felt Europe was the region most important to American national interests, while roughly three-in-ten said Asia.

²⁴ <http://pewresearch.org/pubs/1855/china-poll-americans-want-closer-ties-but-tougher-trade-policy>

China Policy: Get Tough on Trade, But Also Strengthen Relations



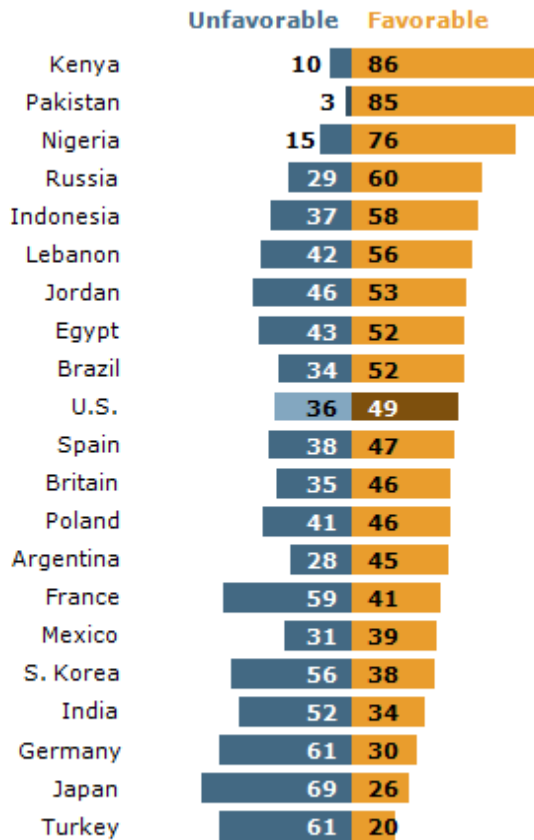
PEW RESEARCH CENTER Jan. 5-9, 2011. Q39a-d.

— This shift reflects changing perceptions about the economic balance of power in the world. Almost half (47%) of Americans say China is the world's leading economic power, while just 31% name the U.S.

Three years ago -- prior to the global economic crisis -- only 30% characterized China as the global economic leader, compared with 41% for the U.S.

The latest national survey by the Pew Research Center for the People & the Press, conducted Jan. 5-9 among 1,503 adults finds that by two-to-one (60% to 27%) Americans see China's economic strength as a greater threat than its military strength. And as Obama goes into talks with the Chinese president, a 53%-majority say it is very important for the U.S. to get tougher with China on trade and economic issues.

Views of China



PEW RESEARCH CENTER Global Attitudes Project, Spring 2010.

Yet while Americans may see China as a problem, relatively few describe it as an adversary, and a 58%-majority say it is very important to build a stronger relationship between the U.S. and China. By comparison, promoting human rights and better environmental policies and practices are important, but lower priorities.

American views of China are not extreme in a global perspective. A [2010 Pew Global Attitudes Project survey](#) found roughly half of Americans expressing a favorable opinion of China, while 36% said they felt unfavorably.

In that survey, attitudes toward China were far more negative in France, Germany and Turkey, as well as among the publics of some of China's neighbors, such as Japan, South Korea and India. By contrast, China is viewed in an overwhelmingly favorable light in places like Kenya and Nigeria (where the U.S. is also viewed very favorably) as well as in Pakistan (where opinions of the U.S. are mostly negative).

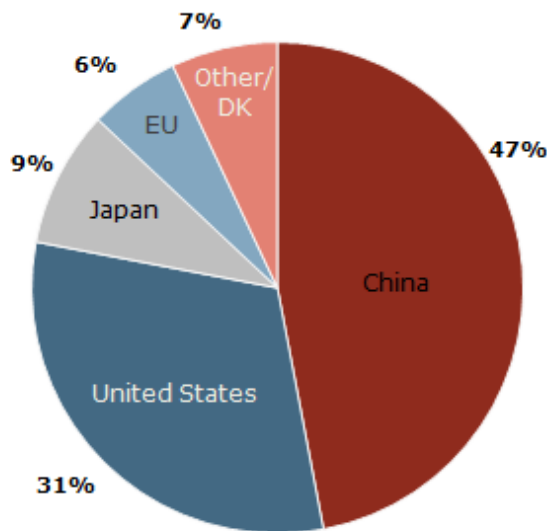
China's Economic Strength

Nearly half (47%) of Americans see China as the world's leading economic power, while 31% say the United States holds that position. As recently as February 2008, the positions of these

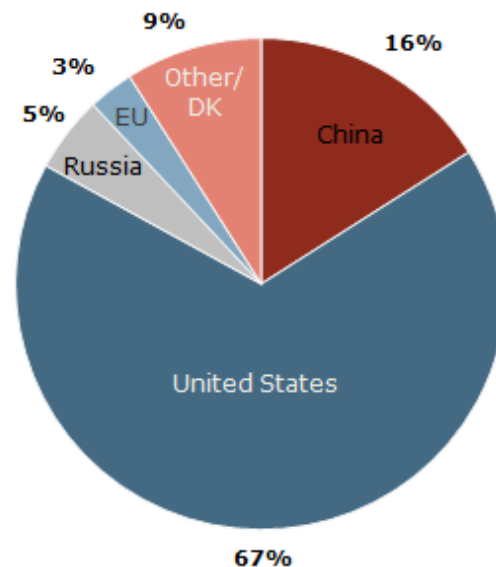
two countries were reversed: 41% named the U.S., and 30% China as the world's leading economic power. Few Americans (6%) place the countries of the European Union in the top position. Similarly, only 9% think Japan occupies the top spot -- a stark change from the late 1980s and early 1990s, when concerns about Japan's growing economic power were widespread. In fact, a January 1989 survey found that by a two-to-one margin, Americans believed Japan was the world's dominant economy: 58% considered Japan the top economic power; only 29% named the U.S.

China Seen as Leading Economic Power; U.S. as Military Power

World's Leading *ECONOMIC* Power



World's Leading *MILITARY* Power



PEW RESEARCH CENTER Jan 6-9, 2011 omnibus. PEW.12/PEW.13.

While Americans believe China has assumed the leading position in the global economy, they see the military balance of power quite differently. Two-thirds (67%) think the U.S. is the world's leading military power. Just 16% say China has the top military, while 5% name Russia and 3% the EU.

In keeping with this, Americans view China primarily as an economic threat, rather than a military one. When asked whether they are more concerned about China's economic or military strength, more say the former by roughly two-to-one (60% vs. 27%).

One-in-five Americans identify China when asked to name the country representing the greatest threat to the U.S., up from 11% in November 2009. This is the highest percentage volunteering China as the greatest danger since a September 2001 poll taken prior to the 9/11 attacks and just months after the dispute over a U.S. surveillance plane that was held by Chinese authorities for several days on the island of Hainan.

China, North Korea Top List of Threats

<i>Country representing "greatest danger" to U.S.</i>	Mar 1990	Feb 1992	Sept 1993	Sept 2001	Oct 2005	Feb 2006	Feb 2007	Sept 2008	Nov 2009	Jan 2011
	%	%	%	%	%	%	%	%	%	%
China	8	8	11	32	16	20	14	16	11	20
North Korea	--	--	1	1	13	11	17	6	10	18
Iran	6	4	7	5	9	27	25	21	21	12
Afghanistan	--	--	--	--	2	1	2	5	14	10
Iraq	--	12	18	16	18	17	19	13	14	8
Pakistan	--	--	--	--	--	1	--	1	3	4
The U.S. itself	4	3	--	2	7	5	5	4	5	4
Russia/U.S.S.R.	32	13	8	9	2	3	2	14	2	2
Mexico	--	--	--	--	--	--	--	--	--	1
Japan	8	31	11	3	1	1	1	1	--	1
Israel	--	--	--	--	--	--	--	--	--	1
Al Qaeda/Terrorist groups	--	--	--	--	2	4	1	3	2	--

PEW RESEARCH CENTER Jan. 5-9, 2011. Q20F1. Multiple responses accepted. Sep. 2001 poll fielded before 9/11.

China (20%) and North Korea (18%) top the list of global dangers, followed by Iran (12%) and Afghanistan (10%). For the first time in more than two decades, fewer than 10% name Iraq as the leading threat.

When the Pew Research Center for the People & the Press first asked this question in March 1990, roughly one-in-three Americans (32%) rated the Soviet Union as the biggest danger to the U.S. By February 1992, with the Soviet Union no longer in existence, Americans believed Japan's rising economic power posed the greatest threat.

While Americans see China as a rising global power, relatively few characterize the U.S.-China relationship as adversarial. Only 22% describe China as an adversary, 43% say it is a serious problem, but not an adversary, and 27% believe China is not much of a problem. The view that China is not a problem is especially common among young people: 42% of 18-29 year-olds hold this opinion.

Few See China as an Adversary

	Sep 1997	Mar 1999	Mar 2000	Sep 2001	Feb 2002	Jul 2004	Oct 2005	Sep 2008	Nov 2009	Jan 2011
<i>Do you think China is...?</i>	%	%	%	%	%	%	%	%	%	%
An adversary	14	20	17	23	17	14	16	19	19	22
Serious problem, but not adversary	46	48	44	48	39	40	45	49	41	43
Not much of a problem	32	25	26	23	33	36	30	26	30	27
DK	<u>8</u>	<u>7</u>	<u>13</u>	<u>6</u>	<u>11</u>	<u>10</u>	<u>9</u>	<u>6</u>	<u>9</u>	<u>9</u>
	100	100	100	100	100	100	100	100	100	100

PEW RESEARCH CENTER Jan. 5-9, 2011. Q20F1. Multiple responses accepted. Sept 2001 data collected before 9/11 terrorist attacks. Figures may not add to 100% because of rounding.

Views on this question have been relatively stable since it was first asked in 1997, although the percentage who consider China an adversary has increased somewhat since 2004, when just 14% saw China this way.

Partisan Differences on Views of China

For the most part, views about China and its military and economic strength do not vary considerably along partisan lines. Yet, Democrats and Democratic-leaning independents express more positive opinions of the Sino-American relationship than do Republican and Republican leaners. While majorities in both groups say relations between the U.S. and China are staying the same, 22% of Democrats say relations between the two countries are improving, compared with just 9% of Republicans. In 2004, when this question was last asked, 16% of Democrats and Democratic leaners and 21% of Republicans and Republican-leaning independents said relations between the two countries were improving.

Modest Partisan Differences in Views of China

<i>Are relations between the U.S. and China...</i>	Total	Rep/ Lean Rep	Dem/ Lean Dem
	%	%	%
Improving	16	9	22
Staying about the same	55	57	55
Getting worse	22	29	17
DK	7	5	6
	100	100	100
<i>Do you think China is...</i>			
An adversary	22	24	19
A serious problem, but not an adversary	43	47	43
Not much of a problem	27	23	29
DK	9	6	9
	100	100	100

PEW RESEARCH CENTER Jan. 5-9, 2011. Q36 & Q37.
Figures may not add to 100% because of rounding.

When asked about their view of China, 47% of Republicans and Republican leaners and 43% of Democrats and Democratic leaners describe that country as a serious problem, but not an adversary. Republicans are somewhat more likely than Democrats to see China as an adversary (24% vs. 19%, respectively); conversely, Democrats are slightly more likely than Republicans to say China is not much of a problem (29% vs. 23%).

Among Republicans and Republican-leaning independents, those who agree with the Tea Party offer more negative views of China and Sino-American relations than do those who disagree with the Tea Party or have no opinion of the movement. One-third of Tea Party Republicans describe China as an adversary, compared with 17% of other Republicans and Republican leaners. And while 34% of those who agree with the Tea Party say relations between the U.S. and China are getting worse, 24% of Republicans who disagree with the Tea Party or do not have an opinion of it say that is the case.

Democrats and Republicans also offer different views about U.S. policy toward China. The partisan gap is especially notable in regards to the promotion of human rights; 48% of Democrats and Democratic-leaning independents say it is very important for the U.S. to do more to promote human rights in China, compared with one-third of Republicans and Republican leaners.

Partisans Agree – Get Tougher on Trade with China

	Total	Rep/ Lean Rep	Dem/ Lean Dem
<i>% very important</i>	<i>%</i>	<i>%</i>	<i>%</i>
Building a stronger relationship	58	54	62
Get tougher on econ/trade issues	53	54	52
Promote human rights	40	33	48
Promote better environmental policies/practices	39	34	43

PEW RESEARCH CENTER Jan. 5-9, 2011. Q39a-d.

Democrats and Democratic leaners are also more likely than Republicans and Republican-leaning independents to say it is very important for the U.S. to do more to promote better environmental policies and practices in China (43% vs. 34%, respectively). And while majorities among both partisan groups say it is very important for the U.S. to build a stronger relationship with China, more Democrats say that is the case (62% vs. 54% of Republicans).

On trade and economics, however, Democrats and Republicans offer similar views; 54% of Republicans and Republican leaners and 52% of Democrats and Democratic leaners say it is very important for the U.S. to get tougher with China on economic and trade issues. But among Republicans, those who agree with the Tea Party are more likely than those who do not to place high priority on the U.S. getting tougher with China on economic and trade issues; 60% of Tea Party Republicans say this is very important, compared with 49% of Republicans and Republican-leaning independents who disagree with the Tea Party or do not have an opinion of it.

15425 Canadians Welcome New Graphic Warnings on Cigarette Packages²⁵

(01/10/11) -

Respondents are divided on whether the images will be effective in convincing smokers to quit.

Canadians are highly supportive of the inclusion of health warnings on tobacco products, and a majority of respondents believe that the graphic images that were recently unveiled are acceptable, a new Vision Critical / Angus Reid poll has found.

In the online survey of a representative national sample of 1,022 Canadian adults, four-in-five respondents (82%) support the use of health warnings that feature information on diseases caused by tobacco and tips on how to quit.

²⁵ <http://www.angus-reid.com/polls/43733/canadians-welcome-new-graphic-warnings-on-cigarette-packages/>

Last month, Canadian Health Minister Leona Aglukkaq announced that these health warnings—which have been used in Canada since 2000—would now occupy 75 per cent of the packaging, and include more graphic images and messaging.

Respondents to this Angus Reid / Vision Critical survey were shown four of the images that are expected to be featured in cigarette packages sold in Canada, including the controversial picture of Barb Tarbox—who died at 42 of lung cancer—under the caption: “This is what dying of cancer looks like.”

A majority of Canadians (60%) believe the images are about right, while one-in-four (24%) would have preferred more graphic imagery, and only 12 per cent think the images are too graphic.

Canadians are divided on the overall effectiveness of the images to convince smokers to quit, with 48 per cent predicting that the labels will be “very effective” or “moderately effective”, and 45 per cent saying they would be “moderately ineffective” or “very ineffective.”

Analysis

A large proportion of Canadians continue to endorse the inclusion of graphic warnings in tobacco products. Support for this practice is remarkably high across the country and in all gender and age groups.

After seeing the new batch of images, only about one-in-eight Canadians felt that the content was too graphic. Three-in-five believe the right balance has been struck, while one-in-four would have actually chosen more graphic content.

While a majority of frequent smokers appear to be undeterred by the images, Canadians who light up occasionally or rarely are practically split in the level of effectiveness that the images will have on people who are considering to quit.

Methodology: From January 4 to January 5, 2011, Vision Critical conducted an online survey among 1,022 Canadian adults who are Angus Reid Forum panelists. The margin of error—which measures sampling variability—is +/- 3.1%. The results have been statistically weighted according to the most current education, age, gender and region Census data to ensure a sample representative of the entire adult population of Canada. Discrepancies in or between totals are due to rounding.

AUSTRALASIA

15026 Half of Australians have bought Online²⁶

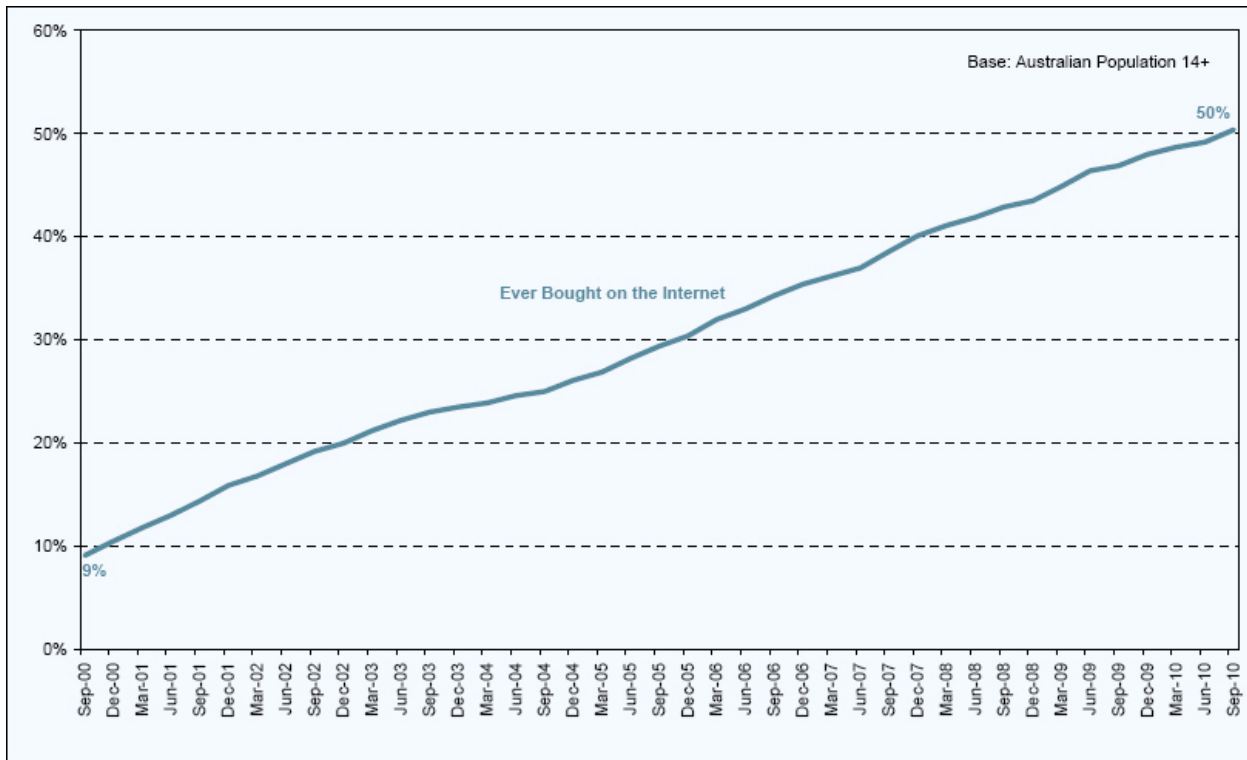
Article No. 1250 - Source: Roy Morgan Research, October 1999 – September 2010, 12 monthly moving average n= 55,291.: January 14, 2011

²⁶ <http://www.roymorgan.com/news/press-releases/2011/1250/>

More Australians are choosing to buy online with half of the Australian population 14 years and over (approximately 9.1 million) having ever bought a product or service over the Internet in the 12 months to September 2010.

Compared to 12 months ago, the proportion of people who have ever bought online has increased by 3% points and is rising.

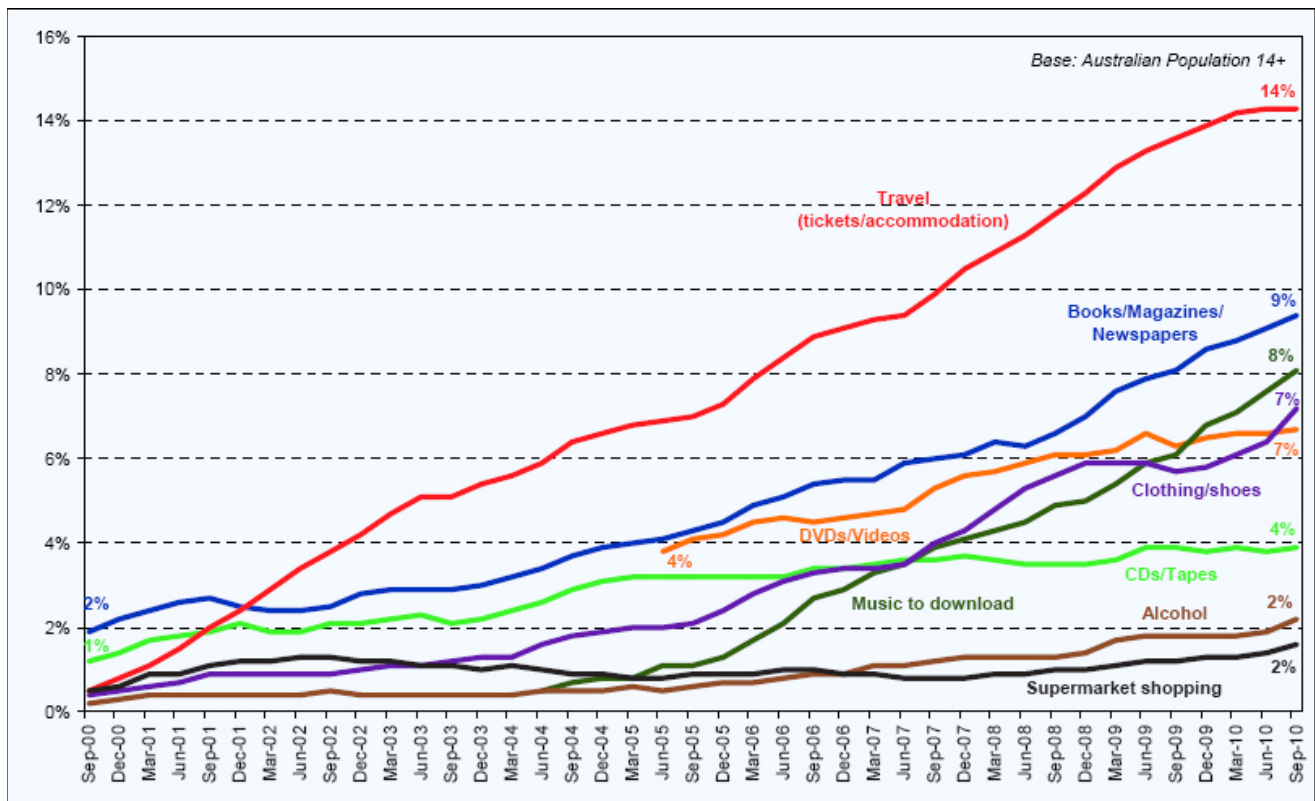
Purchased over the Internet



Source: Roy Morgan Research, October 1999 — September 2010, 12 monthly moving average n= 55,291.

The most common products and services being purchased over the Internet are travel items such as tickets and accommodation with 14 % of the Australian having purchased these in the last 3 months. Music to download (8%) has overtaken DVDs/Videos (7%) and is the third most common item to be bought online. Clothing/shoes (7%) has also increased to overtake DVDs/Videos and now ranks 4th.

Products Purchased over the Internet



Source: Roy Morgan Research, October 1999 — September 2010, 12 monthly moving average n= 55,291.

Norman Morris, Industry Communications Director, Roy Morgan Research, says:

“The growth of online shopping over the last 12 months has been mainly driven by an increase in purchasing books/magazines/newspapers and downloading music whereas supermarket shopping is yet to take off with only 2% buying groceries online. During this time we have also seen the rise in purchasing clothing and shoes online.”

These profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia. Profiles of the following types of online shoppers are available: Adult entertainment, alcohol, books/magazines/newspapers, CDs/Tapes, communications equipment, computer hardware and software, DVDs/Videos, gifts, music to download, online supermarket shopping, shares or financial information, sports equipment/clothing, toys and games and travel.

About Roy Morgan Research:

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States, United Kingdom, New Zealand and Indonesia. A full service research organisation specialising in omnibus and syndicated data, Roy

Morgan Research has more than 65 years experience in collecting objective, independent information on consumers.

In Australia, Roy Morgan Research is considered to be the authoritative source of information on print media measurement, financial behaviour, voting intention and consumer confidence. Roy Morgan Research is a specialist in recontact customised surveys which provide invaluable and effective qualitative and quantitative information regarding customers and target markets.

Margin of Error

The following table gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

<u>Sample Size</u>	<u>Percentage Estimate</u>			
	<u>40%-60%</u>	<u>25% or 75%</u>	<u>10% or 90%</u>	<u>5% or 95%</u>
5,000	±1.4	±1.2	±0.8	±0.6
25,000	±0.6	±0.5	±0.4	±0.3
30,000	±0.6	±0.5	±0.3	±0.3
50,000	±0.4	±0.4	±0.3	±0.2

MULTI-COUNTRY SURVEYS

CYBER WORLD

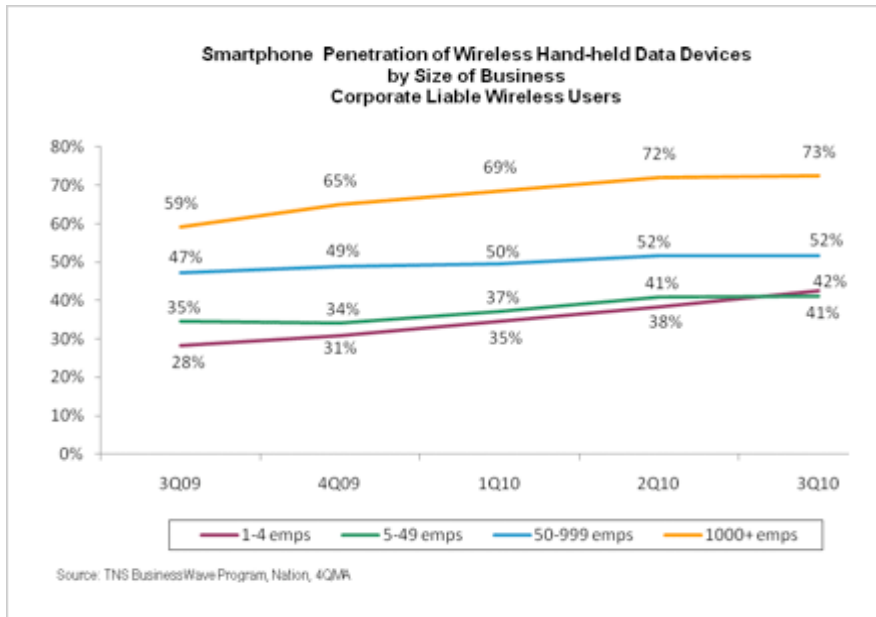
154-27 TNS Survey: Smartphones Gain Traction For Both Businesses And Consumers²⁷
 January 10th, 2011

New York, NY, January 10, 2011—Smartphone use continues to rise among both consumer and business segments, this according to TNS, who today released results of two of its industry leading syndicated programs. The results were compiled from TNS BusinessWave™ a program focusing on the communications usage of more than 20,000 businesses and Request® an in-depth view into the telecommunications behavior of more than 120,000 households.

TNS BusinessWave confirms that Smartphones are an increasingly important tool for the business market. The advance of new operating systems, capabilities and mobile applications that improve employee productivity, have resulted in steady growth in the market, particularly within the past year. Smartphones now represent more than half of all handheld wireless devices used by corporate liable wireless users, up 22% from a year ago, while penetration of other wireless phones has declined. This trend is noted across businesses of all sizes and industries;

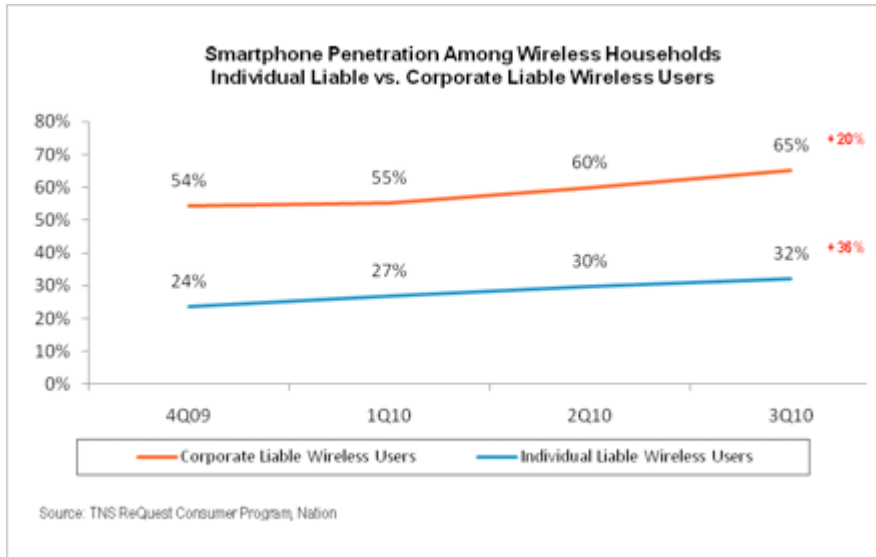
²⁷ http://www.tns-us.com/news/tns_survey_smartphones_gain_traction.php

growth is most rapid among the smallest businesses, but Smartphone penetration remains highest among the largest companies. In addition, Smartphone penetration is strongest among the Manufacturing, Wholesale, Public Administration and Finance industries.



Despite the potential for improved efficiencies, many business users rely solely on email and some customer-facing solutions. Larger-scale adoption and use of mobile business applications will depend on perceived value, distribution, platform integration and assessment of technology security and stability. “The challenge is for application developers to create mobile application packages that extend business processes and integrate with corporate solutions while demonstrating ROI,” says Tom Buehrer, SVP of TNS.

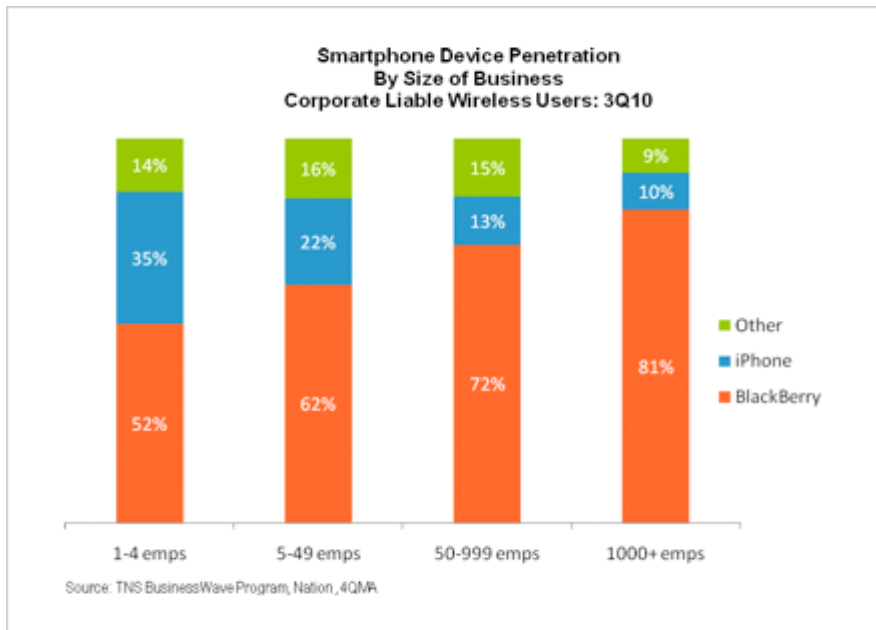
However, Smartphones are not just for business users anymore. The evolution of mobile technology has fueled rapid consumer adoption of these devices. While not yet reaching levels seen in the business market, they have grown dramatically. TNS syndicated consumer research shows that Smartphone penetration among individual liable wireless households is up 36% from just 1 in 4 households in late 2009 to nearly 1 in 3 less than a year later.



Types of Devices—Business Users

According to TNS BusinessWave data, RIM’s BlackBerry remains the leading Smartphone operating system, while the Apple iPhone has been the fastest growing. Based on most recent studies, market penetration for RIM’s BlackBerry is 69% across all businesses and increases by size of business to 81% among Enterprise companies (businesses with 1,000+ employees). The inverse is true for the iPhone. The iPhone experiences its strongest performance in the small business market (1-4 employees), at 35%, nearly twice its penetration in the overall business sector.

Limited distribution as well as restrictions on the applications that can run on the iPhone and concerns about corporate data security may have slowed adoption in large businesses and some industries. “Larger businesses tend to be slower to adopt new technologies and have greater investment in customized systems” notes Buehrer, “However, as employees increasingly demand support for multiple Smartphone platforms and IT managers evaluate devices and mobile apps on the basis of delivering business value to their organizations, we expect companies to move away from a single device approach and offer more choices.”



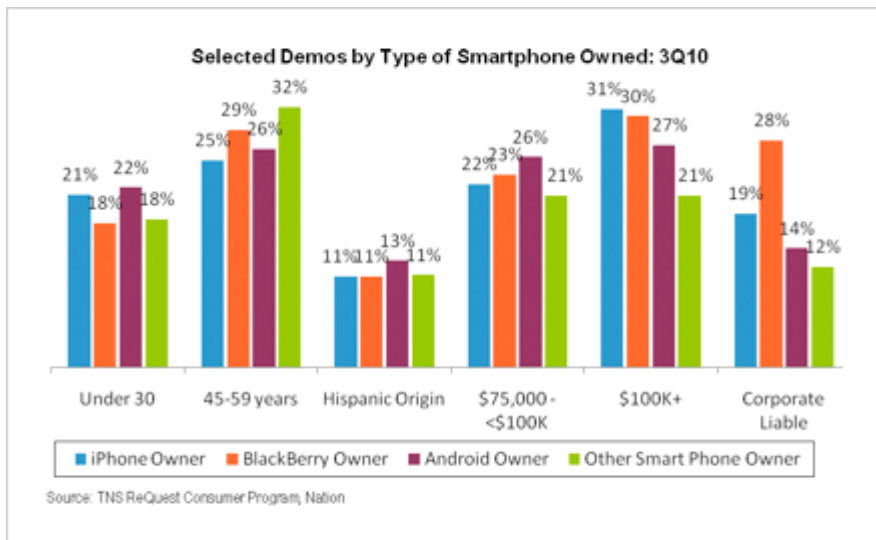
Types of Devices—Personal Users

In the consumer market, RIM’s BlackBerry continues to capture the dominant share among all Smartphone owners (37%), although the iPhone is narrowing the gap (28%). Android’s profusion of devices and carriers is evidenced in penetration that has more than tripled since the first quarter of 2010 (from 6% to 19%).

Smartphone users differ from other wireless phone users in that they tend to be younger, more highly educated, employed full-time and high income earners. However, there are also differences in the types of users attracted to each specific device.

While BlackBerry users are more likely to have a corporate liable wireless phone and also to be middle-aged professionals in the highest income bracket, Android users are more likely to be younger males, either students or employed in sales, service or a blue collar job, with moderately high incomes. They are also the most ethnically diverse group. iPhone users are also younger, but the most highly educated, employed as a manager or professional and earning more than \$100K per year.

As the functionality of Smartphone operating systems continues to converge and become more affordable, more consumers will rely on these devices as an important tool in both their business and personal lives. This proliferation should fuel additional mobile content development and data consumption. “These market dynamics will create significant opportunities across the mobile ecosystem—from device manufacturers to wireless providers as well as software developers and marketers—but the battle for long-term loyalty is being fought now,” adds Mr. Buehrer.



About TNS

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