

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.

Summary of Polls

WEST ASIA

Pakistanis More Sour on U.S. After Bin Laden Raid

The U.S. military operation that resulted in Osama bin Laden's death in Pakistan made an already unpopular U.S. even less popular with some Pakistanis. Sixty-four percent of Pakistanis who were aware of the U.S. action say it made them have a more negative opinion of the U.S., while 5% say it made them have a more positive opinion.(Gallup USA) May 20, 2011

Three in 10 Pakistanis Say Intelligence Knew Bin Laden's Locale

A Gallup poll conducted in Pakistan after the death of Osama bin Laden reveals many Pakistanis believe their intelligence services did not know where bin Laden was before U.S. forces killed him. Nearly half of Pakistanis (49%) who were aware of the U.S. action did not believe Pakistani intelligence (ISI) knew bin Laden's location, while a sizable 31% said at least some members knew. (Gallup USA) May 19, 2011

Pakistanis Criticize U.S. Action That Killed Osama Bin Laden

A new Gallup poll finds almost two-thirds of Pakistanis condemn the U.S. military operation that killed Osama bin Laden -- a sharp contrast to Americans' nearly universal approval of the action. Sixty-four percent of all Pakistanis surveyed a week after the operation said they disapproved; 10% approved, 23% were still unaware of the incident, and 3% did not have an opinion. (Gallup USA) May 18, 2011

SOUTH ASIA

Protests Reflect Frustration With Corruption in India

The recent wave of anti-corruption protests in India likely reflects the sense among many Indians that the country's corruption problem is growing worse. In 2010, almost half (47%) said the level of corruption in India was higher than it was five years earlier, while 27% said it was about the same. (Gallup USA) May 16, 2011

India: Testing the three Ls love, lust and loyalty

An exclusive CVOTER survey finds that more than half of young Indians place trust as the most important factor in a relationship even though about a quarter have been suspicious about their partners “sometimes”. (CVOTER)

May 2011

Fukushima disaster jolts support for Nuclear Energy in India

Those who believe that protests in Jaitapur are of local nature, should look in to the latest Gallup International/CVoter global poll which puts the facts on record. The poll reveals that absolute opposition to nuclear energy in India has skyrocketed from 9% to 29% after the recent Japanese tsunami. (CVOTER)

May 2011

SOUTH EAST ASIA

Half of Filipinos dissatisfied with government handling of the Maguindanao Massacre case

The First Quarter 2011 Social Weather Survey, conducted from March 4-7, 2011, found 51% dissatisfied, 16% neither satisfied nor dissatisfied, and 32% satisfied with what the government had done up to that point to resolve the Maguindanao massacre case with justice, for a poor net satisfaction rating of -19 (% satisfied minus % dissatisfied). (SWS)

May 17, 2011

NORTH EAST ASIA

Taiwanese Consumers Remain Tentative About The Economy, But There Are Signs Of Growing Optimism

Consumer attitudes and opinions towards Taiwan's economy in 2011 are looking up, albeit tentatively. Less than a quarter (23%) of Taiwanese consumers see the country's economy getting worse while over two thirds (67%) see the economy likely to show an improvement or speedy recovery after its current bad patch. (Synovate)

May 19, 2011

Post-Earthquake Study Reveals Japanese Ready To Actively Spend To Boost Economy

Global market research firm Synovate has released survey results to assess the impact of the recent tragic events on Japanese consumers, the market research industry and the quality of research being done in Japan. The results show that Japanese are though concerned about economy however they ready to actively spend to boost economy. (Synovate)

26 April 2011

SUB-SAHARAN AFRICA

ANC Still Retains Majority Support

The African National Congress (ANC) remains the strongest political party in the country, although their support seems to have decreased since the 2009 general election. With the Local Government elections taking place on Wednesday (18 May), the issue of party support is getting a lot of attention. The ANC receives the majority of support among all South Africans 18 years and older, registered voters and likely voters, followed by the DA and then the IFP. (Ipsos South Africa)

May 16, 2011

EAST EUROPE

Polish - Russian Relations

The recurring subject in Polish - Russian relations for the last twelve months has been the Smolensk air-crash, in which many prominent Polish politicians (including President Lech Kaczyński) were killed. In May 2010 - shortly after the crash - Poles assessed the attitude of

both countries to each other exceptionally well. However, the investigation into the reasons of the disaster in the months following the accident resulted in weakening the positive view of Polish – Russian relations. Despite that, they were still believed to be better than in the last decade. (CBOS)

March 2011

WEST EUROPE

User Language Preferences Online

This survey interviewed Internet users in the EU about their language preferences when using the Internet. A large majority of respondents had used the Internet on a daily basis in the past four weeks: 54% said they had gone online several times a day in that timeframe and 30% said it had been about once a day. (Gallup Organization)

May 2011

In UK, Women and Less Educated More Negative on Workplaces

British men and those in the United Kingdom with a college degree are among the most likely in their country to report being employed in a good work environment, according to the Gallup-Healthways Well-Being Index. Women, workers aged 30 to 44, and those with less education rate their work environments less positively. (Gallup USA)

May 18, 2011

Disability In The Media

Findings from this survey of adults in Great Britain, conducted by Ipsos MORI on behalf of Mencap, reveal that the majority of the public is unable to name a high profile person with a disability. David Blunkett and Stephen Hawking are the most well known and Susan Boyle is the only public figure named who has a learning disability. (Ipsos Mori)

May 17, 2011

NORTH AMERICA

Americans' Expectation for 2011 Peak Gas Price Rises to \$4.52

Americans, who currently report paying an average price of \$4 per gallon of gasoline, expect prices to continue to rise to an average of \$4.52 this year. When Gallup last asked Americans about current and expected gas prices, in March, they were paying \$3.45 per gallon and expected to pay up to \$4.36. Thus, as gas prices have risen, so have Americans' expectations of how high they will rise, though the difference between current and expected prices is smaller now than in March. (Gallup USA)

May 19, 2011

High Gas Prices Cause Lifestyle Changes for Many Americans

The slight majority of Americans, 53%, say they have responded to today's steep gas prices by making major changes in their personal lives, while 46% say they have not. Sizable proportions of adults of all major income levels have made such changes, including 68% of low-income Americans, 54% of middle-income Americans, and 44% of upper-income Americans. (Gallup USA)

May 18, 2011

Anti-Incumbent Mood Against Congress Persists in 2011

Twenty-eight percent of U.S. registered voters say most members of Congress deserve re-election, tying the low point in the trend set last year, according to a new USA Today/Gallup poll. (Gallup USA)

May 18, 2011

In U.S., Hopes for Arab-Israeli Peace Still Low, but Up Slightly

President Obama has revved up his call for Israeli-Palestinian peace talks this week in advance of his major Middle East policy address on Thursday and meetings with Israeli Prime Minister Benjamin Netanyahu on Friday. Gallup's annual update of Americans' outlook for the conflict finds 38% optimistic that Israel and the Arab nations will someday live in peace, but 60% are doubtful this will occur. (Gallup USA)

May 19, 2011

For First Time, Majority of Americans Favor Legal Gay Marriage

For the first time in Gallup's tracking of the issue, a majority of Americans (53%) believe same-sex marriage should be recognized by the law as valid, with the same rights as traditional marriages. The increase since last year came exclusively among political independents and Democrats. Republicans' views did not change. (Gallup USA)

May 20, 2011

With Huckabee Out, No Clear GOP Front-Runner

With Mike Huckabee out of the race for the 2012 GOP presidential nomination, three well-known politicians, Mitt Romney, Sarah Palin, and Newt Gingrich, emerge as leaders in Republicans' preferences. Republicans, however, have less intensely positive feelings about these three than they did about Huckabee. Two less well-known potential candidates, Michele Bachmann and Herman Cain, generate high levels of enthusiasm among Republicans who recognize them. (Gallup USA)

May 17, 2011

Is College Worth It?

A majority of Americans (57%) say the higher education system in the United States fails to provide students with good value for the money they and their families spend. An even larger majority (75%) says college is too expensive for most Americans to afford. (Pew Research Center)

May 15, 2011

Most Say Homosexuality Should Be Accepted By Society

While the public is divided over same-sex marriage, a majority of Americans (58%) say that homosexuality should be accepted, rather than discouraged, by society. (Pew Research Center)

May 13, 2011

AUSTRALASIA

Health Information Advisers and Seekers All Around Us

In the 12 months to December 2010, an average of 22% of Australians were asked for advice on health and nutrition information by family and friends. Also, an average of 22% asked family and friends for advice on health and nutrition information, according to the latest Roy Morgan Research Health Monitor. (Roy Morgan)

May 20, 2011

MULTI-COUNTRY SURVEYS

Arab Spring Fails to Improve U.S. Image

As President Obama prepares to make a major address on the tumultuous changes spreading throughout the Middle East, a new survey finds that the rise of pro-democracy movements has not led to an improvement in America's image in the region. Instead, in key Arab nations

and in other predominantly Muslim countries, views of the U.S. remain negative, as they have been for nearly a decade. Indeed, in Jordan, Turkey and Pakistan, views are even more negative than they were one year ago. (Gallup USA)

May 17, 2011

CYBER WORLD

Indians Now Spend More Time On Social Media Sites Than On Personal Email

Social Media has now become part of everyday life for a majority of online Indians. According to a study on social media usage by The Nielsen Company conducted in collaboration with AbsolutData, nearly 30 million Indians who are online consumers are members of social networking sites and about two-thirds of them spend time on these social networking sites daily. (Nielsen)

May 09, 2011

Mobile Banking Surges As Emerging Markets Embrace Mobile Finance

Global use of 'mobile finance' surged in the past year as the spread of new technology and mobile banking infrastructure drove a huge increase in take-up rates around the world, new research from TNS, the world's largest custom research company, reveals today. (TNS Global)

May 12, 2011

UK Mobile Finance Market Doubles In 2011

The use of 'mobile wallet' technology amongst UK consumers has more than doubled in the last 12 months with more than one in ten people now making payments via their mobile, says Mobile Life, a TNS research paper into use of mobiles in the UK. Moreover, one in five UK consumers now use their mobile to perform basic banking functions such as checking their account balance - also up more than 100% on last year. (TNS Global)

May 16, 2011

WEST ASIA

172-1. Pakistanis More Sour on U.S. After Bin Laden Raid

Many think U.S. should leave Afghanistan, but expect U.S. to stay

May 20, 2011

WASHINGTON, D.C. -- The U.S. military operation that resulted in Osama bin Laden's death in Pakistan made an already unpopular U.S. even less popular with some Pakistanis. Sixty-four percent of Pakistanis who were aware of the U.S. action say it made them have a more negative opinion of the U.S., while 5% say it made them have a more positive opinion.

Does this action make you have a more positive or more negative opinion of the United States?

	More positive	No change (volunteered)	More negative
Pakistanis aware of the U.S. operation	5%	21%	64%

May 9-12, 2011

GALLUP®

These results from the May 9-12 survey underscore how difficult the task will be for Pakistan and the U.S. to repair relations after the U.S. raid on bin Laden's compound near Abbottabad. The poll also found the majority of Pakistanis condemn the U.S. action, and most who were aware of the action disapprove that it took place without their government's prior knowledge.

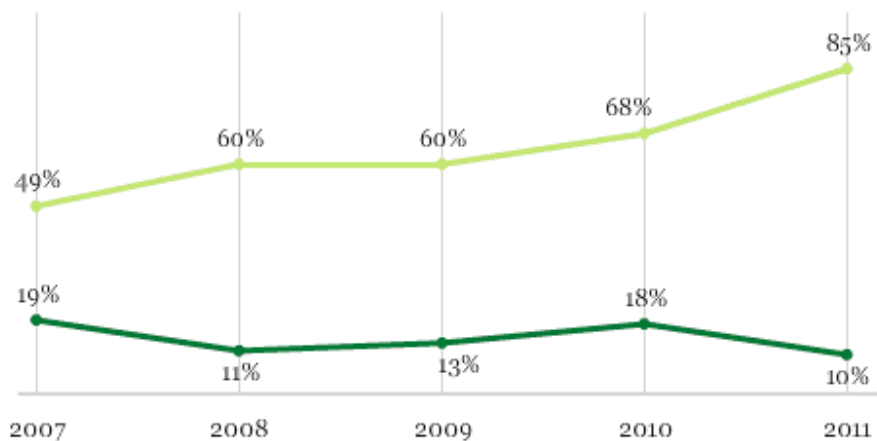
Approval of U.S. Leadership Sinks, Disapproval Soars

Pakistanis' opinions of U.S. leadership have never been favorable in the years Gallup has been polling there. Overall, the 10% of Pakistanis who approved of U.S. leadership last week is down from 18% in 2010, but not meaningfully lower than what Gallup measured in 2008 and 2009. Disapproval, however, soared to a record-high 85%.

Do you approve or disapprove of the job performance of the leadership of the United States?

Asked of Pakistani adults

■ % Approve ■ % Disapprove



Data in 2008 and 2009 based on multiple surveys conducted those years

GALLUP

Although few Pakistanis overall approve of U.S. leadership, those who were aware of the U.S. action are slightly more likely to approve of U.S. leadership (11%) than those who were not aware (4%). But the results also suggest there is resentment for the U.S. action even among the Pakistanis who approve of U.S. leadership. A majority of these Pakistanis say the U.S. action made them have more negative opinions.

Pakistanis Think U.S. Should Leave Afghanistan, but Expect U.S. to Stay

Many Pakistanis believe the U.S. should withdraw its troops from Afghanistan now that bin Laden is dead -- possibly reflecting their frustration with drone attacks that did not stop with his demise. Seventy-nine percent of Pakistanis who were aware of the U.S. action say the U.S. should go now, while 14% think the U.S. should stay. Even among Pakistanis who approve of U.S. leadership, a majority say U.S. troops should go.

Now that Osama bin Laden has been killed, do you think U.S. troops should withdraw from Afghanistan or should they continue to stay?

	Should withdraw	Should continue to stay	Don't know/ Refused
Pakistanis aware of the U.S. operation	79%	14%	7%

May 9-12, 2011

GALLUP

However, Pakistanis are largely skeptical that the U.S. will leave. Fifty-seven percent who were aware of the U.S. military operation that killed bin Laden say they do not think the U.S. will now withdraw its forces from Afghanistan. Slightly more than one-quarter (26%) say they think the U.S. will leave.

Now that Osama bin Laden has been killed, do you think U.S. troops will withdraw from Afghanistan or will they continue to stay?

	Will withdraw	Will continue to stay	Don't know/ Refused
Pakistanis aware of the U.S. operation	26%	57%	17%

May 9-12, 2011

GALLUP

Implications

While the U.S. is not offering any apologies for killing bin Laden on Pakistani soil, it did step up efforts this week to smooth relations between the two countries, even as some lawmakers called for U.S. aid to be cut. The deputy director of the CIA and another envoy met with Pakistani intelligence and leadership Thursday, after U.S. Sen. John Kerry's visit there earlier this week.

With Pakistanis' opinions about the U.S. moving from bad to worse after bin Laden's death, it is not clear even whether full U.S. withdrawal from Afghanistan would reverse this decline. For its part, the U.S. does not yet see its mission in the region as complete, and neither do many Americans. Gallup's data reinforce the significant diplomatic challenges that lie ahead for both countries.

Survey Methods

Results are based on face-to-face interviews conducted between May 9-12, 2011, with 1,004 adults, aged 15 and older, covering urban and rural areas across all four provinces. Results for those who were aware of the U.S. operation are based on a sample of 792 adults. Federally administered areas and Azad Jammu Kashmir were excluded from this study. For results based on the total sample, one can say with 95% confidence that the maximum margin of sampling error is ± 4 percentage points. The margin of error reflects the influence of data weighting. 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.

Source: http://www.gallup.com/poll/147698/Pakistanis-Sour-Bin-Laden-Raid.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=

172-2. Three in 10 Pakistanis Say Intelligence Knew Bin Laden's Locale

Majority believe U.S. could not have conducted raid without government's knowledge
May 19, 2011

WASHINGTON, D.C. -- A Gallup poll conducted in Pakistan after the death of Osama bin Laden reveals many Pakistanis believe their intelligence services did not know where bin Laden was before U.S. forces killed him. Nearly half of Pakistanis (49%) who were aware of the U.S. action did not believe Pakistani intelligence (ISI) knew bin Laden's location, while a sizable 31% said at least some members knew.

Do you believe that some members of the Pakistani intelligence services knew that Osama bin Laden was living in the compound in Abbottabad, or not?

	Yes	No	Don't know/Refused
Among Pakistanis aware of the U.S. military operation	31%	49%	20%

May 9-12, 2011

GALLUP®

Questions about what Pakistan's military and political leadership did or did not know continue to swirl more than two weeks after bin Laden was killed less than a mile from a military academy near Abbottabad. U.S. Defense Secretary Robert Gates said at a press conference Wednesday that it was likely "somebody" inside Pakistan knew, but that he had not seen any evidence that top army and political officers had prior knowledge.

Pakistan's army commanders acknowledged "shortcomings in developing intelligence on the presence of Osama bin Laden in Pakistan," and are investigating how the ISI could have failed to detect him. At the time of the survey, 44% of all Pakistanis said they were confident in the ISI, and 41% said they were not, which suggests the intelligence agency could be on somewhat shaky ground with the public.

The military's overall image is on much firmer footing; 78% of Pakistanis expressed confidence in the armed forces. Confidence in the military in Pakistan historically has been about that high, which suggests this incident has not had any perceivable negative effect on the image the military enjoys among the Pakistani public.

Pakistanis Unconvinced Government Did Not Know About Operation

Pakistanis are less likely to believe their government's claims that it had no prior knowledge of the U.S. raid. Nearly two-thirds of Pakistanis who were aware that the operation took place said they do not believe the U.S. could have conducted it without the knowledge of the Pakistani government or intelligence services.

Do you believe the U.S. could have conducted this operation without the knowledge of the Pakistani government/intelligence services, or not?

	Yes	No	Don't know/Refused
Among Pakistanis aware of the U.S. military operation	22%	65%	13%

May 9-12, 2011

GALLUP

Low approval of President Asif Ali Zardari's reaction to the U.S. operation also likely does not help the government's credibility. Although Zardari has been defending Pakistan and its efforts to fight terrorism in the press, 75% of Pakistanis who were aware of the incident said they disapproved of his reaction to the U.S. operation. Even among Pakistanis who said they approved of their national leadership, 15% approved of his reaction.

Implications

When the Pakistani parliament convened on May 13 in a closed, joint session to review the U.S. military operation, it focused largely on the breach of sovereignty and efforts required to prevent that from happening again, rather than the question of how bin Laden could have stayed inside Pakistan undetected for more than five years. Pakistan's next steps -- and whether it provides the public with answers to how this could have happened -- will likely be crucial to regaining some of the trust the civilian government has lost among its own citizenry and abroad.

Survey Methods

Results are based on face-to-face interviews conducted between May 9-12, 2011, with approximately 1,000 adults, aged 15 and older covering both urban and rural areas across all four provinces in Pakistan. Federally administered areas and Azad Jammu Kashmir were excluded from this study. For results based on the total sample, one can say with 95% confidence that the maximum margin of sampling error is ± 4 percentage points.

Source: http://www.gallup.com/poll/147650/Three-Pakistanis-Say-Intelligence-Knew-Bin-Laden-Locale.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=USA

172-3. Pakistanis Criticize U.S. Action That Killed Osama Bin Laden

Many believe Pakistan will be less safe from terrorism

May 18, 2011

WASHINGTON, D.C. -- A new Gallup poll finds almost two-thirds of Pakistanis condemn the U.S. military operation that killed Osama bin Laden -- a sharp contrast to Americans' nearly universal approval of the action. Sixty-four percent of all Pakistanis surveyed a week after the operation said they disapproved; 10% approved, 23% were still unaware of the incident, and 3% did not have an opinion.

Do you approve or disapprove of the U.S. military action that killed Osama bin Laden?

	Approve	Disapprove	Don't know/ Refused/ Not aware*
All Pakistanis	10%	64%	26%
Pakistanis aware of U.S. military action	13%	82%	4%
Americans	93%	5%	2%

*Pakistanis were asked whether they were aware of the U.S. military action before being asked other questions about the action. Americans were not.

Survey in Pakistan conducted May 9-12, 2011.

U.S. survey conducted May 2, 2011.

GALLUP

Although the news about the U.S. military operation that killed bin Laden near Abbottabad, Pakistan, had not reached all Pakistanis by the time the survey took place May 9-12, 82% of Pakistanis who did know about the incident disapproved, while 13% approved.

Pakistanis Would Have Preferred to See Bin Laden Captured Alive

Pakistanis and Americans are also at odds on what should have happened to bin Laden. The plurality of Pakistanis (41%) said he should have been captured, rather than killed, and half as many (22%) said neither should have happened. Eight percent said he should have been killed. Among Pakistanis who were aware of the action, 52% said bin Laden should have been captured, rather than killed, and 29% said he should neither have been captured nor killed.

Which of the following comes closest to your view?

	Osama bin Laden should have been killed	Osama bin Laden should have been captured but not killed	Osama bin Laden should have neither been captured nor killed
All Pakistanis*	8%	41%	22%
Pakistanis aware of U.S. military action	10%	52%	29%

*23% of Pakistanis were unaware of the military action at the time of the survey.

Survey in Pakistan conducted May 9-12, 2011.

GALLUP

The majority of Americans (60%), however, when asked a similar question, said bin Laden should have been killed, and 33% said he should have been captured alive.

Better for the U.S. to Have Captured or Killed Osama bin Laden?

Do you think it would have been better for the U.S. to: [OPTIONS ROTATED]

	National adults
Capture Osama bin Laden alive	33%
Kill Osama bin Laden	60%
Don't know/No opinion	7%

USA Today/Gallup, May 2, 2011

GALLUP

Nearly 9 in 10 Dislike That Operation Took Place Without Government Knowledge

Regardless of how they feel about bin Laden's killing, Pakistanis who were aware of the operation disapprove that it was carried out inside Pakistan without the government's knowledge. Nearly 9 in 10 of these Pakistanis disapproved, which suggests they may perceive it as a violation of sovereignty, as former President Pervez Musharraf recently told *Newsweek*. "There is one downside to [the death of bin Laden], and this is the violation of the sovereignty of Pakistan," he said. "I strongly believe that, and the people of Pakistan are very sensitive to this."

Regardless of how you feel about the killing of Osama bin Laden, do you approve or disapprove of the operation being carried out inside Pakistan without the knowledge of the government?

	Approve	Disapprove	Don't know/Refused
Pakistanis aware of the military action	7%	85%	8%

Survey conducted May 9-12, 2011

GALLUP

Pakistanis See Themselves as Less Safe From Terrorism

While a slight majority of Americans (54%) believe bin Laden's death will make the U.S. safer from terrorism, Pakistanis, who have often been the targets of terrorism in recent years, feel vulnerable. Before the suicide attacks in northwest Pakistan on Friday -- which the Pakistani Taliban claimed were revenge for bin Laden's death -- nearly half of all Pakistanis (46%) said his death made their country less safe from terrorism. Sixty percent of Pakistanis who were aware of the U.S. operation felt more at risk.

Do you think that the killing of Osama bin Laden will make [your country] more safe or less safe from terrorism?

	More safe	No difference [volunteered]	Less safe
All Pakistanis*	6%	19%	46%
Pakistanis aware of U.S. military action	7%	24%	60%
Americans	54%	12%	28%

*23% of Pakistanis unaware of U.S. military action.

Survey in Pakistan conducted May 9-12, 2011.

U.S. survey conducted May 2, 2011.

GALLUP

The fact that the U.S. found and killed bin Laden in Pakistan did not particularly boost Pakistanis' confidence in their country's efforts, either. Half of Pakistanis who are aware of the U.S. operation said it made them less confident in their country's efforts to fight terrorism, while 15% said it made them more confident and 26% volunteered that it made no difference. Gallup surveys in 2010, well before bin Laden's death, showed many Pakistanis felt the government's anti-terrorism efforts were falling short.

Implications

Americans' and Pakistanis' different reactions to the operation and bin Laden's death illustrate the wide gulf that exists in their respective perceptions about the war on terrorism and Pakistan's participation. Although news reports suggest bin Laden's killing has angered many Pakistanis, the perceived attack on their country's sovereignty perhaps hurts them more.

U.S. Sen. John Kerry's visit to Pakistan aimed to defuse the situation, but if both countries want to rebuild trust they will need to demonstrate shared commitment. Additional Gallup analyses in the coming days will cover the operation's effect on Pakistanis' views of U.S.-Pakistan relations, as well as their views of their own leadership's handling of the situation.

Survey Methods

Results are based on face-to-face interviews conducted between May 9-12, 2011, with approximately 1,000 adults, aged 15 and older covering both urban and rural areas across all four provinces in Pakistan. Federally administered areas and Azad Jammu Kashmir were excluded from this study. For results based on the total sample, one can say with 95% confidence that the maximum margin of sampling error is ± 4 percentage points.

Results for this *USA Today*/Gallup poll are based on telephone interviews conducted May 2, 2011, with a random sample of 645 adults, aged 18 and older, living in all 50 U.S. states and the District of Columbia.

For results based on the total sample of national adults, one can say with 95% confidence that the maximum margin of sampling error is ± 5 percentage points.

The margin of error reflects the influence of data weighting. 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.

Source: http://www.gallup.com/poll/147611/Pakistanis-Criticize-Action-Killed-Osama-Bin-Laden.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=USA

SOUTH ASIA

172-4. Protests Reflect Frustration With Corruption in India

In 2010, almost half of Indians said corruption had increased in recent years

May 16, 2011

WASHINGTON, D.C. -- The recent wave of anti-corruption protests in India likely reflects the sense among many Indians that the country's corruption problem is growing worse. In 2010, almost half (47%) said the level of corruption in India was higher than it was five years earlier, while 27% said it was about the same.

Do you think the level of corruption in this country is lower, about the same, or higher than it was five years ago?

	Lower	About the same	Higher	Don't know/Refused
Indian adults	14%	27%	47%	12%

June 2010

GALLUP*

The protests in early April were part of a nationwide campaign to block the passage of a proposed Lokpal (ombudsman) Bill that opponents considered too weak. After social activist Anna Hazare's four-day hunger strike, the government agreed to redraft the bill, this time giving civil society representatives a greater role in ensuring a new government ombudsman's office would have enough power to enforce anti-corruption laws.

The groundswell of public support for Hazare and the anti-corruption movement shows Indians recognize that the problem is endemic in their society. In response to the 2010 poll, 78% of Indians said corruption is widespread within the Indian government, and 71% said it is widespread within businesses in India.

Is corruption widespread within _____, or not?

Asked of Indian adults

	Yes	No	Don't know/Refused
The government in India	78%	9%	13%
Businesses located in India	71%	14%	15%

June 2010

GALLUP*

Asked whether they thought the government was doing enough to fight corruption, more than one-third of Indians (35%) said yes, while half (50%) said no. Unemployed Indians were particularly likely to feel the government was not doing enough to fight corruption, with nearly two-thirds (65%) responding that way.

Unemployed Indians were also among the most likely to say they recently found themselves in a situation in which they needed to pay a bribe. Bribery remains widespread in Indian society; about one in five Indians (21%) overall said they had faced a situation in the past 12 months in which a bribe was required to solve a problem. Among the country's unemployed, however, the

figure rises to 43% -- an indicator that those seeking welfare and job services are among the most vulnerable.

Sometimes people have to give a bribe or a present in order to solve their problems. In the last 12 months, were you, personally, faced with this kind of situation, or not?

	Yes	No	Don't know/Refused
All Indian adults	21%	73%	6%
Unemployed Indians	43%	54%	3%

June 2010

GALLUP

Bottom Line

Following recent high-profile scandals -- including a collusion scheme that landed India's telecom minister in jail, and allegations that the planners of last year's Commonwealth games stole billions -- Indians have begun to act on their frustration with the country's corruption problem. Survey results reveal Indians do not believe the problem is getting any better and many have had to deal with corruption personally. However, the likelihood that systemic change can be implemented largely depends on whether Indians' underlying dissatisfaction produces sustained public pressure for reform.

Survey Methods

Results are based on face-to-face interviews with 6,000 adults, aged 15 and older, per survey wave. For results based on this total sample, one can say with 95% confidence that the maximum margin of sampling error is ± 1.7 percentage points. The margin of error reflects the influence of data weighting. 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.

Source: http://www.gallup.com/poll/147539/Protests-Reflect-Frustration-Corruption-India.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Asia%20-%20Business

172-5. Testing the three Ls love, lust and loyalty

How suspicious are young Indians of their partners and would they administer them the loyalty test? An exclusive CVOTER survey finds that more than half of young Indians place trust as the most important factor in a relationship even though about a quarter have been suspicious about their partners "sometimes"

Sex and the Indian cities (and towns) have always had an uneasy relationship. Despite being in the land of the Kama Sutra, Indians have been prudish about their inner lives. And with the sanctity of the institution of marriage holding firm at least firmer than in many cultures, particularly in the West sexual adventures and misadventures may be embarked upon but never talked about. And heaven help you should your spouse/partner even get a whiff of your past, not to mention straying present. From movies like Sangam to Silsila, the outcome outlined for straying partners is always unwelcome near total social isolation, at best. In fact, even a supposedly modern take on marriage by filmmaker Karan Johar, the film, Kabhi Alvida Na Kehna, whose popular lead actors indulge in extramarital affairs, is fraught with societal tensions not to mention large amounts of personal guilt for the straying lovers who must undergo a

symbolic period of exile/separation after exiting their less-than-perfect marriages and before they can come together in a happily ever after.

What will be your reaction if your friend tells you something about your partner?			
	Male	Female	Average
Can't say	10.7%	11.4%	11.0%
keep quiet	11.7%	14.4%	12.7%
Not trust	27.3%	34.3%	29.7%
Will try to investigate	42.3%	34.1%	39.4%
Leave the partner	3.6%	1.3%	2.8%
Get a Loyalty test done	4.3%	4.5%	4.4%

Social mores in India, then, have been typically very rigid about sexual fidelity, and particularly for women who are expected to enter their marital home and only leave it upon death, as the popular religious discourse runs. But while we may have idealized the state of matrimony in particular, it doesn't mean that partners don't cheat. They just do so even more surreptitiously than elsewhere and certainly don't kiss and tell. Moreover, changing social mores and values over the years mean that the phenomenon of cheating has become more overt, less covert. Divorces, even amongst senior citizens (as a recent report indicates), have become more common and acceptable. And changing boyfriends and girlfriends at the drop of a hat may seem like no big deal really. A recent advertisement outlines this quite clearly, when the girl catches her boyfriend getting cosy with another girl but instead of becoming heartbroken, or even terribly upset, she calmly gets her own back by publically proclaiming him to be a "loser" and then walking out!

If you are attracted to somebody else, how will you break off with your existing partner?			
	Male	Female	Average
Can't say	20.7%	33.4%	25.1%
Will ignore partner	5.9%	2.8%	4.8%
will inform partner	30.8%	29.5%	30.3%
Will try to negotiate by talking	35.2%	30.6%	33.6%
will break the relation by lying	7.4%	3.7%	6.1%

Nothing exemplifies this shift in India's changing social mores than this advert. Gone are the days when young lovers would vow undying loyalty. (Should they die without achieving that ultimate union, Bollywood films always reincarnated them to pursue the full course of love, with its grand finale being marriage what happens after did not concern the cinegoers in the least,

apparently.) Instead, we seem to have accepted the view propounded by Darwinian theorists and one in particular by Scottish sociologist Angus Macintyre in 2008-09 that like most animals, man is naturally polygamous. And true to his (or her) nature, a human being is bound to look for multiple partners.

Have you had relations with more than one at the same time?			
	Male	Female	Average
Can't say	0.6%	1.7%	1.0%
Yes	25.5%	5.6%	18.6%
No	69.4%	91.4%	77.0%
For some time	4.6%	1.3%	3.4%

Marriage is a social institution, something propounded to establish a firm society the fabric for advancement of the entire species. Natural instincts is another matter altogether. But whether or not you agree with such worldviews, fact is that except perhaps in some tribal societies where free and easy mating rituals are permitted, most of us have a deep unease of being in fickle relationships. Whether it is the West or the more conservative Asian societies, stability, primarily through marriage, is a sought-after, idealized goal for both men and women (but perhaps more so for the latter, because of the infamous biological clocks ticking away). And any breakdown of marriage, a deeply traumatic event, particularly if it has been brought about by a third person. In our search for perfect love and commitment leading to such stability then, what we are looking for consciously or subconsciously is a feeling of security that can only come from complete trust and faith in the partner's loyalty. But in today's times, when affections can no longer be taken for granted and where changing social values have made it easier even cooler to cheat, that is easier said than done. So, what does a suspicious partner do? Administering the loyalty test has become a fad of sorts to check up on one's suspicions.

If you've been plagued by doubt a faint smudge of blood red lipstick on your boyfriend/husband's collar, the incessant blank calls on the home landline, or even those huge bills totalled up on his credit card it may be time to throw off those blinkers and get set to work the loyalty test on your partner. Or, so the premise goes. Reality TV star Dimpy Mahajan administered this to her husband Rahul, a couple of years ago (not that it ceased the troubles in the relationship that seem to continue after marriage) and scores of jealous boyfriends/girlfriends not to mention husbands/wives have been contemplating it no doubt with even a TV show Emotional Atyachaar working on the premise.

What then is a loyalty test, you may well ask? In short, it is propounded as a simple way to see if your partner is cheating on you behind your back. It's deemed as a yardstick to check how true your relationship is. To check the partner's loyalty, a variety of means may be used, including technology spycams, live video streams and tapped phone calls to a live bait; a good-looking man or woman asking the partner out to see if he/she slips up. At least this is the dubious methodology employed on TV to determine the trueness of the relationship.

But how much does a loyalty test help in the long run?

While there are many young women who say that this is a good way of catching cheating boyfriends and taking control of your life rather than living with blinkers on, skeptics say that

while such tests may raise a few voyeuristic laughs, it is really trust between two partners that is the rockbed in any relationship. If you are suspicious, administering the loyalty test, may not ultimately help even if your partner has emerged with flying colours.

Most psychologists would tend to agree with the above. According to many such observers, life, especially for the Indian youth, has changed drastically over the years and it is peer pressure to appear cool rather than “love” that leads many into serious and steady relationships. On the other hand, when these people look around and see others their age indulging in a steady stream of free and easy relationships, casual sex and multiple partners, this same desire to be one of the fashionable crowd, may tempt them. Ironically, living life in the so-called fast lane, or aspiring to it, does not take away from the almost unanimous desire to find that “one true love” that all fairytales speak of. One may simply have to kiss a lot of frogs before that!

Having relations with more than one person is?			
	Male	Female	Average
Can't say	3.4%	1.5%	2.8%
Right	22.8%	5.2%	16.7%
Totally wrong	73.8%	93.3%	80.6%

In such a scenario, where relationships are based on either fickle or highly idealized and impossible expectations, what has certainly lessened is basic human bonding. People have stopped communicating with others and they are certainly less tolerant of the flaws in one another something that ultimately ruins many a relationship. Administering loyalty tests when the fundamentals themselves are wrong may be of little use, say psychologists, who also point out that with young girls/boys being dangled as baits, it may be only human for a partner to slip up even if he or she is genuinely in love with the boy/girl back home. After all, love and lust are two separate things and it is the tightrope between them that the young Indians must navigate. A recent, exclusive CVOTER study held across 21 states polled 1414 randomly selected people, below 40, to ascertain their take on the feasibility of giving their partners loyalty tests and also the three Ls that often perplex Indian youth love, lust and loyalty. That a majority of the youth are ready to investigate their partners should a whiff of suspicion fall on the latter was evident in the answer to the question as to the reaction of the respondents should a “friend” tell them something unsavoury about their partners. While 42.3 per cent of men said that they would investigate, 34.1 per cent of women said the same thing in contrast to a marginally higher number of 34.3 per cent who said that they will not trust what the friends are saying. On the other hand, very few people (4.3 per cent men and 4.5 per cent women) said Admin that they would go in for a loyalty test. When asked as to how they would break off with their existing partners if they were attracted to someone else, a majority of 33.6 per cent said that they would negotiate by talking it out. Only 6.1 per cent (more men 7.4 per cent than women) said that they would get out of the relationship by lying. It would seem then that the Indian youth are more mature and trustworthy than many give them credit for.

One reason given for girlfriends or wives in particular opting for loyalty tests is the Indian male’s unreliability, who supposedly carry on with other people even while in a steady relationship. Is this perception largely true? Well, the poll may just bear this out. As many as a quarter of men polled (25.5 per cent) admitted that they had relations with more than one partner

at a single time. In contrast, only 5.6 per cent of women agreed to the statement while an overwhelming 91.4 per cent replied with a firm “no”. Women, it would definitely seem, are more loyal of the two sexes. Further, as many as 22.8 per cent of male respondents said that having relations with more than one person at the same time is right! While 10 per cent of the men also admitted to having ditched their partners, surprisingly enough in these days of casual relationships, most people said that they had not even changed one partner till date. While more than half 50.9 per cent of men said that, 70.7 per cent of women said that they had never changed partners making Indians, if we are to take the respondents at their face value one of the most loyal people across the globe!! However, a relatively high percentage of people both men and women said that there is no harm in flirting. As many as 34.6 per cent said that flirting is “ok”, slightly less than the 37.3 per cent (of which 40 per cent were women) who said that it is wrong.

On the tricky question of one night stands, 58.8 per cent of the respondents (51.9 per cent men and 71.8 per cent women) expectedly said that these are wrong. The surprise, however, were the 19.4 per cent of people roughly one fifth who made no moral judgements and said these happen. Of these, about 24.4 per cent, or roughly a quarter, said that “it happened” and thus made no value judgments.

If there were problems between two partners, who would they approach. A majority of Indians polled said “friends” with about half (49 per cent) reposing faith in them instead of in relatives or even parents and siblings. While families may have been traditionally close-knit structures in Indian societies, this finding reveals their changing status within society. At least when it comes to relationships, we seem less inclined to fall back on flesh and blood something that can be attributed to changing values and generation gap.

Young Indians also made a clear distinction between love and lust in the poll. When asked whether sex is essential for love, almost half of those polled (45.4 per cent men and 58.4 per cent women) said “no”. This finding illustrates what we may have known all along. In India, as many marriages prove, people tend to equate love with with many other things, not necessarily physical chemistry!

The youth surveyed in this poll also gave a clear verdict about their stance on loyalty tests. While these may be fads, an overwhelming 50.9 per cent said that they were irrelevant since trust was the important issue between two partners. Only 9.2 per cent (10.3 per cent women) said that these were “eye openers”. Many more (15.2 per cent) believed that they could spoil relations while 15.7 per cent deemed them necessary in today’s day and age. So how many people have doubted their partners to necessitate such steps. A clear majority of 59 per cent said that they have never doubted their partners, while slightly less than a quarter a significant number said that they had “sometimes” doubted. Of these, and contrary to stereotypes of women being more suspicious, it was 26.1 per cent of men who confessed to having doubts. More than 67 per cent of Indians voted unanimously for the statement that “love is truth”, all else irrelevant in any relationship and 52.9 per cent, the majority, said that attraction for them was emotional, not physical. With such beliefs, we will have to come to the conclusion that youth in India are more mature than we may have credited them with being in the past loyalty tests or not.

Methodology

National representative sample of 1414 randomly selected respondents by CATI across 21 states in India during 31st to 3rd Jan. 2011. (Age Groups Below 40)

Source: http://teamcvoter.com/2011/newsletter51/newsletter_5issue1_2011.pdf

172-6. Fukushima disaster jolts support for Nuclear Energy in India

Latest research has suggested that Nuclear Energy is falling out of popular favors globally, but is the same happening in India? Those who believe that protests in Jaitapur are of local nature, should look in to the latest Gallup International/CVoter global poll which puts the facts on record. The poll reveals that absolute opposition to nuclear energy in India has skyrocketed from 9% to 29% after the recent Japanese tsunami.

To understand it better, let's put it this way: every 4th Indian is strongly against nuclear power now. But before the Fukushima Daiichi incident, only about one in ten Indians was against nuclear power. To cap it all, this opposition is growing globally from Jaitapur to Japan. World-over every 3rd person is strongly against nuclear power after the Fukushima Daiichi incident, while earlier only about one in ten were against it.

As of today, what is your view: Do you strongly favor, somewhat favor, somewhat oppose or strongly oppose the use of nuclear energy as one of the ways to provide electricity for the world?

	Sam- ple Size	Strong- ly Favor	Some- what Favor	Some- what oppose	Strongly Oppose	No Re- sponse
Global Aver- age*	34,122	20	29	17	26	8
India	1,084	32	17	6	29	16

Even if you discount the recent agitations in Jaitapur, where thousands have been protesting against setting up of the 9,900 MW nuclear power plant in Ratnagiri district of Maharashtra, the general mood has sunk. The number of supporters was 41% above the ones who opposed, before Fukushima. But post Fukushima the difference is just 14%.

The trend reflects the global mood. Net Favour has fallen from 25% to a mere 6%, as hundreds of millions worldwide become concerned about Nuclear Leakages and switch sides from favoring to opposing Nuclear Power. However supporters continue to outnumber opponents by 49% to 43%. In India too supporters have an edge of 14%, which is better than the global edge of 6%.

Before the Earthquake in Japan, what was your view: Were you in favour, somewhat in favour, somewhat opposed or strongly opposed to the use of nuclear energy as one of the ways to provide electricity for the world?

	Sam- ple Size	Strong- ly Favor	Some- what Favor	Some- what oppose	Strongly Oppose	Don't know
Global Aver- age*	34,122	24	33	15	17	11
India	1,084	33	25	8	9	25

Globally, the sharpest fall in support has happened in Japan itself where Net Favour fell by 41%: from 34% prior to the Earthquake to minus 7% post Fukushima. Critics may argue that India may not be considered to have a high awareness of the radiation leak at Fukushima. But the research reveals that almost 88% of respondents knew about the Earthquake and Tsunami in Japan, while 61% knew about the radiation leak. Though this is 20% less than the global awareness level of 81%, but given the numbers, the opposition to nuclear energy would have been probably much more if Indian would have been enjoying the same level of media penetration and literacy levels.

TV seems to have been the single biggest source of information. It may be attributed to the fact that the Tsunami was telecast directly by the NHK and carried by stations worldwide.

Indians in general are optimistic about Japan's resilience. 58% have a positive outlook with 27% thinking that Japan will be economically stronger than earlier. But 29% think that it will be weaker. This is in consonance with the global popular opinion, which is on the whole optimistic of Japan's resilience to face this crisis. As many as 48% of those polled globally, expect Japan restore to pre-earthquake levels (30%) or even higher (18%) levels. In comparison, 38% are pessimistic and say Japan might find it hard to regain its former economic conditions. Notably the conservative or pessimistic view on resilience of the economy comes from within Japan itself where 55% are somewhat skeptical.

To what extent do you agree or disagree that nuclear power plants in your country are properly secured against accidents?

	Sample Size	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	NR
Global Average*	34,122	23	18	13	21	10	16
India	1,084	13	13	7	41	7	19

A Matrix across all 47 countries, in which the survey was carried, shows 4 distinct groups of countries; First group is of countries where majority view in favor of nuclear energy turned into minority. Second is where majority view was severely thinned and Third group where majority view was moderately impacted. Countries where support for nuclear energy was already a minority and where it was further thinned form the fourth group. India falls in group two where majority view.

According to International Atomic Energy Association (IAEA) sources there are 31 countries in the world which have nuclear facilities for electricity generation. Of them 19 happen to be in our sample. Their analysis shows the following:

1- In 4 of them views on nuclear energy were already held by a minority. These minorities shrank further or remained a minority. These include Belgium, Germany, Switzerland, Brazil and Spain.

2- In 4 of them majority view in favor of nuclear energy declined to become a minority view. These are Japan, Canada, Netherlands and Romania.

3- In 3 of them majority view favoring nuclear energy was severely thinned, by a drop of 10% points or more. These are: China, India and Russia.

4- In 8 of them, majority view favoring nuclear energy declined but moderately, that is, less than 10% points. These are USA, France, Korea, Pakistan, Bulgaria, Czech, Finland.

In India, the Fukushima incident has done what a whole range of political opposition could not do in 2008. The UPA lost the support of the Left on the issue of Indo-US Civil Nuclear deal.

Yet, the Left seemingly failed to create a popular opposition to the deal. Following the trust vote, which the UPA won, the deal went through. And India became a hot destination for suppliers.

But following Fukushima, there is a widespread alarm. Particularly, as India's industrial security records are not particularly laudable. What is happening in Jaitapur has been seen by a section of the media as a disturbance created by a section of ill-informed political class. But, the opposition in Jaitapur in particular and concern across India in general is in sync with the global mood. It seems, the government has a lot of work to do in the coming days, as it projected nuclear power as a concrete solution to India's energy crisis.

Methodology

National representative sample of 1084 randomly selected respondents by CATI across 21 states in India on 25th March, 2011. Data weighted to known census profile. Margin of error +/- 3% at.

Source: http://teamevoter.com/2011/newsletter5i1/newsletter_5issue1_2011.pdf

SOUTH EAST ASIA

172-7. Half Of Filipinos Dissatisfied With Government Handling Of The Maguindanao Massacre Case

First Quarter 2011 Social Weather Survey:

51% dissatisfied with government handling of the Maguindanao massacre case; 75% find the trial too slow

May 17, 2011

The First Quarter 2011 Social Weather Survey, conducted from March 4-7, 2011, found 51% dissatisfied, 16% neither satisfied nor dissatisfied, and 32% satisfied with what the government had done up to that point to resolve the Maguindanao massacre case with justice, for a *poor* net satisfaction rating of -19 (% *satisfied* minus % *dissatisfied*).

The National Administration's new net satisfaction rating in handling the Maguindanao massacre case is 14 points down from a *neutral* -5 (41% satisfied, 46% dissatisfied) in November 2010 [Chart 1]. It is the administration's lowest rating out of the 16 specific issues tested [Table 1].

The March 2011 survey found that 75% say the current pace of the Maguindanao massacre case is *too slow*, 21% say it is *moving at the right pace*, and 4% *too much in a hurry* [Chart 2].

It found that 47% say the present administration's treatment of the Ampatuan family and their co-accused in the Maguindanao massacre case is *just right*, 39% say it is *too lenient*, and 13% *too harsh* [Chart 3].

The March 2011 survey also found that the news on the court trial of the Maguindanao massacre case was followed *very closely/somewhat closely* by 67% of the public, similar to 70% in both September and November 2010 surveys [Chart 4].

Majorities of 73% in Metro Manila, 68% in Mindanao, 67% in Balance Luzon, and 58% in the Visayas follow the news on the Maguindanao massacre case very closely/somewhat closely.

Dissatisfaction with National Administration worsened in all areas and classes

Compared to the previous quarter, the net satisfaction rating of the National Administration in handling the Maguindanao massacre case fell in all areas and classes.

It switched from *neutral* to *poor* in Balance Luzon, down by 21 points from +3 in November 2010 to -18 in March 2011, and in the Visayas, down by 18 points from -5 to -23 [Chart 5].

It stayed *poor* in Metro Manila, worsening by 7 points from -13 to -20, and in Mindanao, down by 2 points from -16 to -18.

By class, it switched from *neutral* to *poor* in class class D or the masa, down by 16 points from -5 to -21, and in class E, down by 13 points from +1 to -12 [Chart 6].

It switched from *poor* to *bad* in class ABC, down by 9 points from -28 to -37.

Majorities say the Maguindanao massacre case is moving too slow

To the question, "*In your opinion, what do you think of the current pace of the Maguindanao massacre case?*" [*"Sa inyong palagay, ano po ang tingin ninyo sa kasalukuyang takbo ng paglilitis ng kasong Maguindanao massacre?"*], majorities of 81% in Metro Manila, 76% in the Visayas, and 75% in Balance Luzon, and 70% in Mindanao answered *too slow* [Chart 7].

Those who say the case is *moving at the right pace* is 24% in Mindanao, 23% in Balance Luzon, 17% in Metro Manila, and 17% in the Visayas.

Only 7% in the Visayas, 5% in Mindanao, 2% in Metro Manila, and 2% in Balance Luzon say the case is too much in a hurry.

By class, majorities of 95% in class ABC, 78% in class D, and 62% in class E also find the pace of the case *too slow*.

Mixed opinions on government treatment of the Ampatuans

To the question, "What do you think about how the present administration is treating the Ampatuan family and their co-accused in the Maguindanao massacre case? ["Ano po ang palagay ninyo sa pagtrato ng kasalukuyang administrasyon sa pamilya Ampatuan at sa mga kasama pa nitong akusado sa Maguindanao massacre?]", over half in Metro Manila (54%) and in Balance Luzon (53%) say it is *just right*.

However, almost half (48%) in Mindanao find the government treatment of the Ampatuans and their co-accused *too lenient*, while opinion is split in the Visayas between 42% who say it is too lenient and 40% who say it is *too strict*.

By class, half in class E (51%) find the government's treatment of the accused *just right*.

However, opinions are split in class ABC, where 46% say the treatment is *just right* and 45% say it is *too lenient*, and in class D, where 46% say it is *just right* and 43% say it is *too lenient*.

Survey Background

The March 2011 Social Weather Survey was conducted from March 4-7, 2011 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 2011 to obtain the national estimates.

The past Social Weather Surveys cited in this report all used face-to-face interviews of at least 1,200 adults nationwide.

The Social Weather Survey items on the Maguindanao Massacre case are non-commissioned. These items were 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.

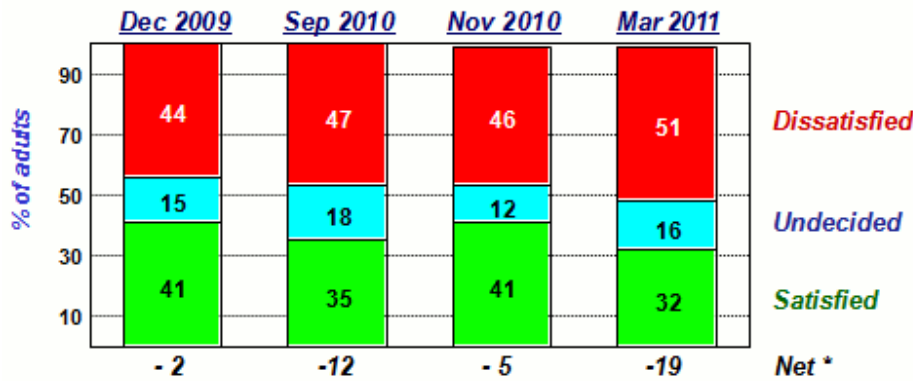
[SWS terminology for Net Satisfaction Ratings: +70 and above, "excellent"; +50 to +69, "very good"; +30 to +49, "good"; +10 to +29, "moderate", +9 to -9, "neutral"; -10 to -29, "poor"; -30 to -49, "bad"; -50 to -69, "very bad"; -70 and below, "execrable"]. A single-digit net satisfaction is considered not significantly different from zero.

#

Chart

1

SATISFACTION WITH WHAT THE GOVERNMENT HAS DONE, UP TO NOW, TO RESOLVE THE MAGUINDANAO MASSACRE CASE WITH JUSTICE, DEC 2009 TO MAR 2011



* Net ratings = % Satisfied minus % Dissatisfied correctly rounded. Blank spaces are Don't Know and Refused responses.
 Q. Noong Nobyembre 23, 2009, na-masaker ang 57 tao sa Maguindanao, kasama ang ilang miyembro ng pamilyang Mangudadatu, maraming mamamahayag at iba pang mga sibilyan. Ayon sa pamilyang Mangudadatu, ang nag-utos ng masaker na ito ay ang pamilyang Ampatuan, ang kanilang pu'tikal na katunggal. Gaano po ba kayo NASISIYAHAN o HINDI NASISIYAHAN sa mga ginawa ng gobyerno hanggang sa ngayon upang makatarungang maresolba ang kasong ito? Kayo po ba ay... (SHOWCARD)?



First Quarter 2011 Social Weather Report
 March 4-7, 2011 National Survey

Table

1

NET* SATISFACTION WITH THE NATIONAL ADMINISTRATION ON SPECIFIC ISSUES, JUNE 2010 – MAR 2011

	Jun10	Sep10	Nov10	Mar11	
Overall performance rating	+64	+64	+64	+46	
Helping the poor	+15	+52	+47	+47	Good
Foreign relations	+28	+52	+55	+44	
Setting a good example of morality	-3 (Mar08)			+44	
Being prepared for natural disasters			+45	+43	Moderate
Reconciliation with Muslim rebels	+22	+29	+32	+32	
Reconciliation with Communist rebels	+24	+27	+31	+31	
Implementing housing programs for the poor			+33	+30	Neutral
Fighting terrorism	+30	+32	+29	+29	
Suppressing politicians with private armies in Mindanao		+4	+17	+24	
Deciding quickly on important problems	-6 (Dec00)			+23	Poor
Acting according to what the people want	-2 (Sep06)			+23	
Fighting crimes		+21	+24	+20	
Eradicating graft and corruption	-27	+22	+22	+14	
Ensuring no hunger	-13	+19	+11	+5	Neutral
Fighting inflation	-25	+19	+7	0	
Resolving the Maquindanao massacre case with justice		-12	-5	-19	

* Net figures (% Satisfied minus % Dissatisfied) correctly rounded.

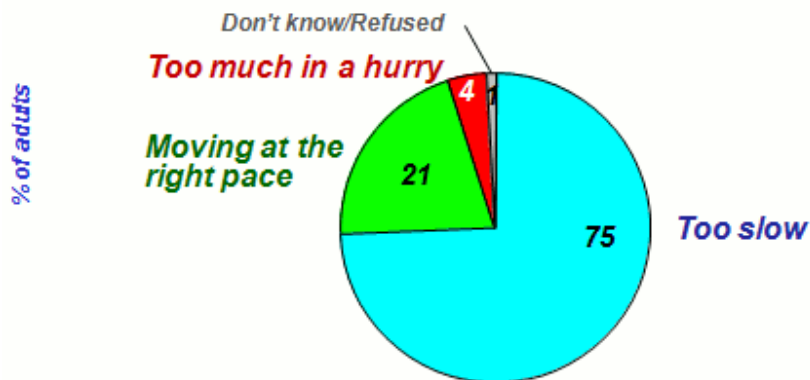


First Quarter 2011 Social Weather Report
 March 4-7, 2011 National Survey

Chart

OPINION ON THE CURRENT PACE OF THE MAGUINDANAO MASSACRE CASE, MAR 2011

Q. In your opinion, what do you think of the current pace of the Maguindanao massacre case? Is it ...?



Q141: Sa inyong palagay, ano naman po ang tingin ninyo sa kasalukuyang takbo ng paglilitis ng kasong Maguindanao massacre? Ito po ba ay... (MASYADONG NAGMAMADALI; TAMA LANG ANG TAKBO; MASYADONG MABAGAL)?

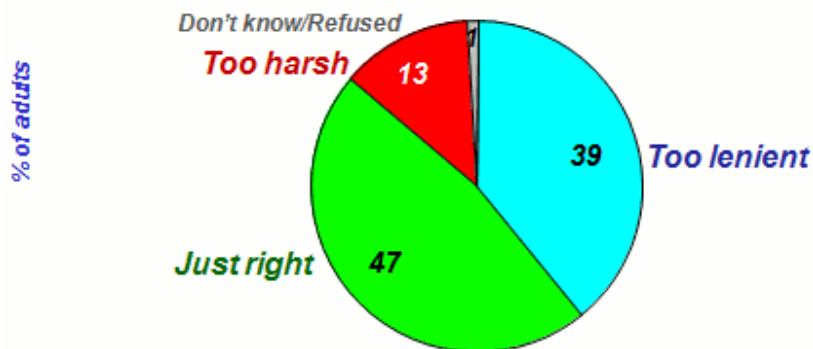


First Quarter 2011 Social Weather Report
March 4-7, 2011 National Survey

Chart

OPINION ON THE ADMINISTRATION'S TREATMENT OF THE AMPATUAN FAMILY AND THEIR CO-ACCUSED IN THE MAGUINDANAO MASSACRE CASE, MAR 2011

Q. What do you think about how the present administration is treating the Ampatuan family and their co-accused in the Maguindanao massacre case? Would you say that it is ...?



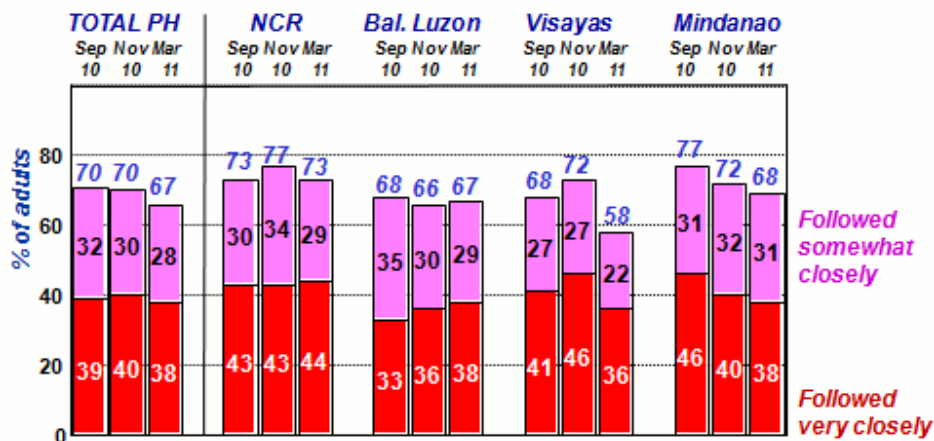
Q140: Ano po ang palagay ninyo sa pagtrato ng kasalukuyang administrasyon sa pamilya Ampatuan at sa mga kasama pa nitong akusado sa Maguindanao massacre? Masasabi ba ninyo na ito ay (MASYADONG MAHIGPIT; TAMA LANG; MASYADONG MAPAGBIGAY)?



First Quarter 2011 Social Weather Report
March 4-7, 2011 National Survey

Chart

FOLLOWING NEWS ON THE EVENTS REGARDING THE MAGUINDANAO MASSACRE, BY AREA, SEP 2010 AND NOV 2010
 (% who followed Very Closely/Somewhat Closely)



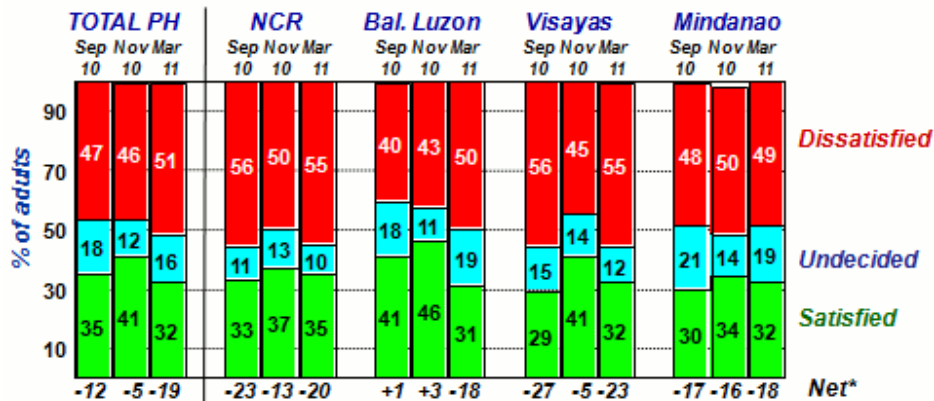
Q17. Narito po ang ilang pangyayari na inilalar sa midya sa nakaraang tatlong buwan. Sa bawat isa, pakisabi lamang po kung ang mga ulat dito ay inyong Sinundan nang mabuti, Medyo sinundan, Sinundan nang kaunti lamang, Hindi sinundan, o Ngayon lang kayo may narinig tungkol dito? [MGA KAGANAPAN TUNGKOL SA MAGUINDANAO MASSACRE]



First Quarter 2011 Social Weather Report
 March 4-7, 2011 National Survey

Chart

SATISFACTION WITH WHAT THE GOVERNMENT HAS DONE, UP TO NOW, TO RESOLVE THE MAGUINDANAO MASSACRE CASE WITH JUSTICE, BY AREA, SEP 2010 TO MAR 2011



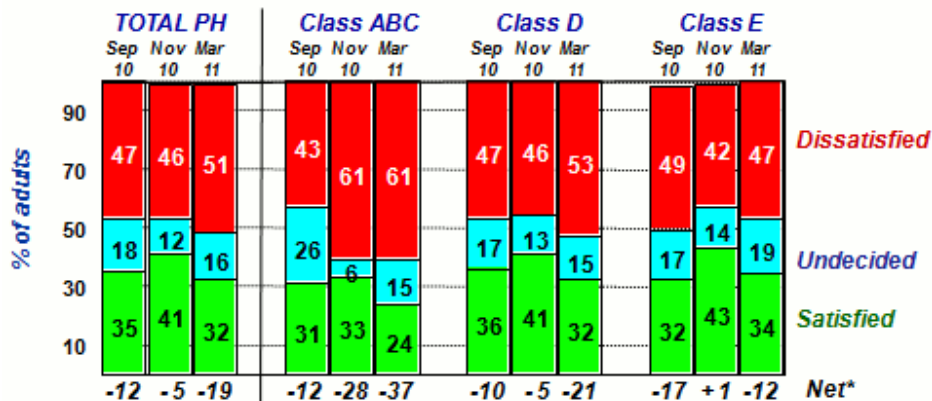
*Net ratings = % Satisfied minus % Dissatisfied correctly rounded. Blank spaces are Don't Know and Refused responses.
 Q. Noong Nobyembre 23, 2009, na-masaker ang 57 tao sa Maguindanao, kasama ang ilang miyembro ng pamilyang Mangudadatu, maraming mamamahayag at iba pang mga sibilyan. Ayon sa pamilyang Mangudadatu, ang nag-utos ng masaker na ito ay ang pamilyang Ampatuan, ang kanilang pu itikal na katunggal. Gaano po ba kayo NASISIYAHAN o HINDI NASISIYAHAN sa mga ginawa ng gobyerno hanggang sa ngayon upang makatarungang maresolba ang kasong ito? Kayo po ba ay... (SHOWCARD)?



First Quarter 2011 Social Weather Report
 March 4-7, 2011 National Survey

Chart

SATISFACTION WITH WHAT THE GOVERNMENT HAS DONE, UP TO NOW, TO RESOLVE THE MAGUINDANAO MASSACRE CASE WITH JUSTICE, BY CLASS, SEP 2010 TO MAR 2011



*Net ratings = % Satisfied minus % Dissatisfied correctly rounded. Blank spaces are Don't Know and Refused responses.
 Q. Noong Nobyembre 23, 2009, na-masaker ang 57 tao sa Maguindanao, kasama ang ilang miyembro ng pamilyang Mangudadatu, maraming mamamahayag at iba pang mga sibilyan. Ayon sa pamilyang Mangudadatu, ang nag-utos ng masaker na ito ay ang pamilyang Ampatuan, ang kanilang pu itikal na katunggal. Gaano po ba kayo NASISIYAHAN o HINDI NASISIYAHAN sa mga ginawa ng gobyerno hanggang sa ngayon upang makatarungang maresolba ang kasong ito? Kayo po ba ay... (SHOWCARD)?

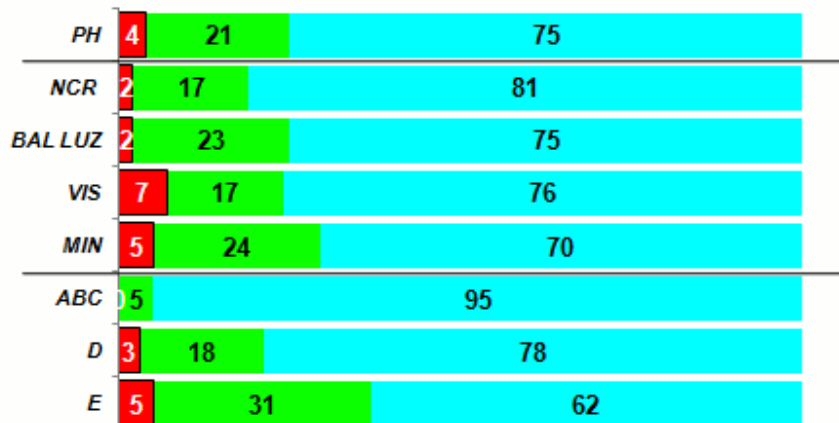


First Quarter 2011 Social Weather Report
 March 4-7, 2011 National Survey

Chart

OPINION ON THE CURRENT PACE OF THE MAGUINDANAO MASSACRE CASE, BY AREA AND CLASS, MAR 2011

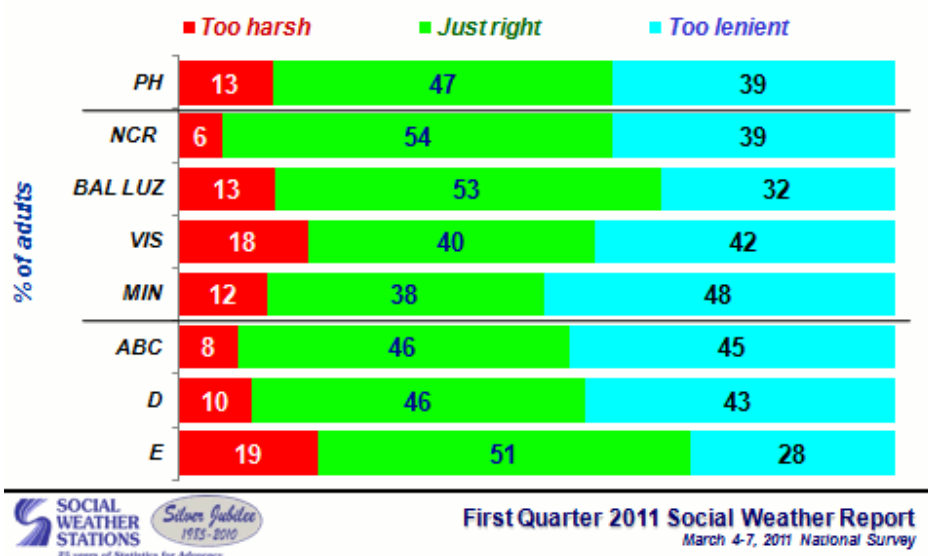
■ Too much in a hurry ■ Moving at the right pace ■ Much too slow



First Quarter 2011 Social Weather Report
 March 4-7, 2011 National Survey

Chart

ON THE ADMINISTRATION'S TREATMENT OF THE AMPATUAN FAMILY AND THEIR CO-ACCUSED IN THE MAGUINDANAO MASSACRE CASE, BY AREA AND CLASS, MAR 2011



Source: <http://www.sws.org.ph/>

NORTH EAST ASIA

172-8. Taiwanese Consumers Remain Tentative About The Economy, But There Are Signs Of Growing Optimism

19 May 2011

TAIPEI — Consumer attitudes and opinions towards Taiwan's economy in 2011 are looking up, albeit tentatively. Less than a quarter (23%) of Taiwanese consumers see the country's economy getting worse while over two thirds (67%) see the economy likely to show an improvement or speedy recovery after its current bad patch.

Exploring consumer attitudes and perceptions in relation to spending habits and the economy in the coming twelve months, leading market research company Synovate surveyed over 1,000 Taiwanese from the ages of 15 to 64 across all income levels as a complementary follow-on survey from last year's 'State of the Economy' Omnibus survey.

Synovate found that most consumers predict an improvement in the current economic situation over the next year, but at the same time are under no illusion it's necessarily going to happen overnight. Likewise, the study shows that nearly 60% of consumers think their "personal economic situation" will stay the same over this period while 29% think it will get better.

Interestingly, priorities may be changing in this economic climate with consumers possibly taking stock of their own goals and values, with most of those surveyed preferring an improved living environment over luxury holidays and better returns from investments. Likewise, they spent more on leisure travel and meals out, and cut spending on premium goods and food consumption.

Taiwanese consumers continue to most fear the loss of income as a result of unemployment, with concerns around the security of future earnings and comfort in later life predominating.

Unlike last year's doubts around the computer and electronic industry, and predictions that it would be in recession for at least the next five years, 66% of consumers surveyed this year feel the computer and electronic industry, alongside the medical industry, will be prosperous. Conversely, the majority feel the automotive industry will get worse.

Synovate found a further decline in nervousness in 2011 in relation to spending, with fewer Taiwanese surveyed saying they are spending less on luxuries, for example. Likewise, some consumers have relaxed their guard on cost cutting measures. Last year, 21% of consumers surveyed exchanged branded products for cheaper alternatives while this year only 10% claimed to do so, indicating a relaxation on budgeting household expenditure.

However, 44% continue to compare prices, indicating a continued degree of caution in household budgets. Additionally, there are still substantial cuts by households occurring in spending on most items from high tech equipment to family holidays. Spending on luxury items and impulse purchases continue to be the main areas of cost-cutting for consumers.

Life is returning to normal for many. This year, there have been fewer life-changing decisions, such as postponing marriage or changing jobs, taking place as a result of the financial pressures. Synovate found significantly fewer people changing their important life plans altogether.

Up slightly from last year, 43% of respondents agree that the economic situation for the country will improve next year. However many remain firm on a slow recovery period, with no overnight fix occurring.

Without a doubt though, consumers still find the extra cash for those treats which help us all leave behind the daily grind of budgeting and gloomy economic forecasts. More than three quarters (77%) of consumers told us that they would always find a way to afford some items that make them feel good.

Full results in a spreadsheet format are available upon request.

About the survey

This survey was conducted with 1,006 people via random telephone household sampling in Greater Taipei (50%), Greater Taichung (22%), and Greater Kaohsiung (28%). Respondents were males and females aged 18 to 64, and quotas on age and gender were applied as follows:

Age	Male	Female	Total
15-24 yr.	12.5%	12.5%	25%
25-34 yr.	15%	15%	30%
35-49 yr.	15%	15%	30%
50-64 yr.	7.5%	7.5%	15%

Total	50%	50%	100%
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About Synovate

Synovate, the market research arm of Aegis Group plc, generates insights to help clients drive competitive brand, product and customer experience strategies. A truly borderless company with offices in over 60 countries, our approach combines best in class global research capabilities with personalised service, local knowledge and the flexibility to create teams and processes that meet clients' specific requirements. At Synovate, our clients sit at the top of our organisational chart, driving us to continually develop more innovative research solutions that predict actual business outcomes. For more information, visit www.synovate.com.

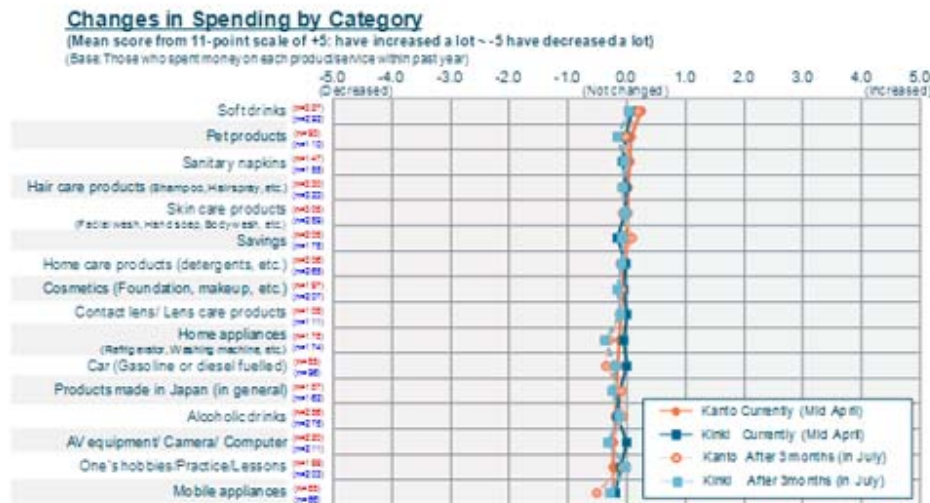
Source:<http://www.synovate.com/news/article/2011/05/taiwanese-consumers-remain-tentative-about-the-economy-but-there-are-signs-of-growing-optimism.html>

172-9. Post-Earthquake Study Reveals Japanese Ready To Actively Spend To Boost Economy

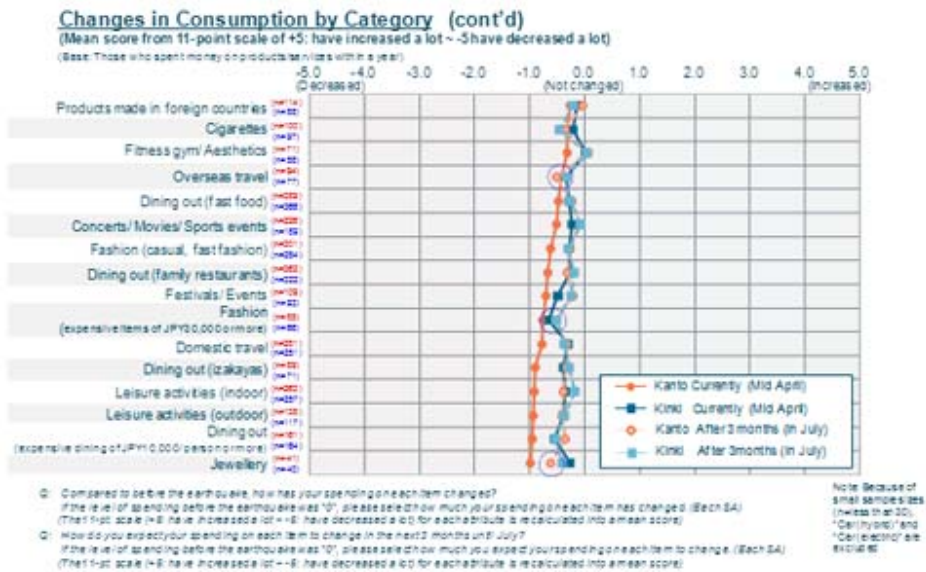
26 April 2011

JAPAN — Global market research firm Synovate has released survey results to assess the impact of the recent tragic events on Japanese consumers, the market research industry and the quality of research being done in Japan. Interviews were conducted in Greater Osaka (Kinki) and Greater Tokyo (Kanto) regions to measure consumers' opinions on a series of attitudinal and product related issues. Data collected from Greater Osaka serves as a control group to compare to Greater Tokyo, where power blackouts and radioactivity concerns will likely continue for the foreseeable future.

Based on the study findings, the implications for the market research industry vary by product category. Little impact was found on consumption and usage behaviour for daily necessities in both regions. As a result, the effects on conducting market research are expected to be minimal.

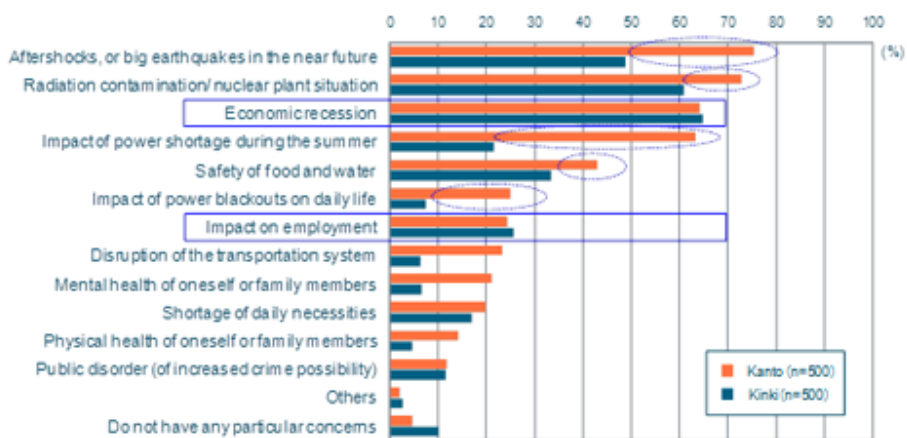


On the other hand, spending decreases on travel, dining and luxury goods are not likely to recover until July or later, which do impact research activities.



People in both regions remain concerned about the economy and employment. However, concerns about power shortages, aftershocks, radiation and food safety were significantly higher in Greater Tokyo, which is also dealing with logistics issues. Companies are advised to have greater consideration to timing and content when conducting research on affected products, such as fresh produce or dairy products.

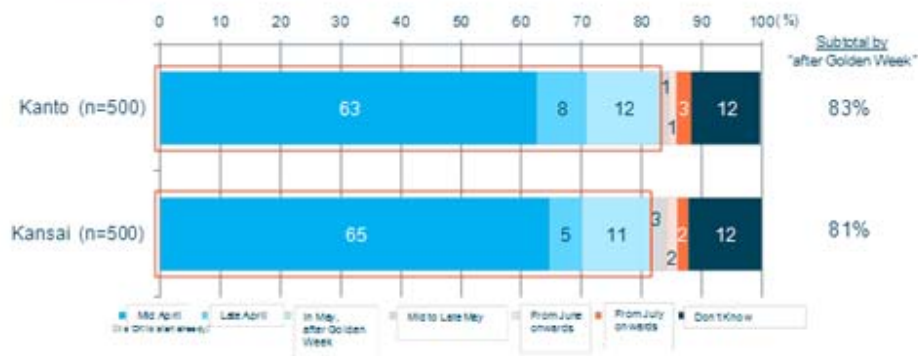
General Concerns (Multiple Answers)



Q: It has been about a month since the earthquake struck on March 11. What areas, if any, are you currently have concerns/unease about? (MA)

People in both regions agree it is suitable to resume marketing activities, including market research, after Golden Week (9 May) to help revive the Japanese economy.

Timing of Corporate Marketing Activities



Q: On Friday, March 11, a big earthquake struck in east Japan which heavily impacted peoples' lives, the Japanese economy, and many corporations. For the sake of the restructuring of quake-hit areas, some have commented on the necessity of resuming marketing activities, while others have also indicated the need for self-restraint. When do you think would be a good timing for companies to resume their marketing activities in order to boost restructuring and revive the Japanese economy? (SA)
 *Golden Week: A string of national holidays (April 29, May 3, 4, and 5). After Golden Week equals from May 9.

Research Design

Methodology Online Survey using an opt-in panel

Area Greater Tokyo (Tokyo/ Kanagawa/ Saitama/ Chiba/ Tochigi/ Gunma/ Yamanashi)
 *Ibaraki is excluded as it is an affected area
 Greater Osaka (Osaka/ Hyogo/ Kyoto/ Shiga/ Nara/ Wakayama)

Sample Size Greater Tokyo: n=500 / Greater Osaka: n=500

Respondent 16-69 years old, Male/ Female
 Criteria *Data is weighted according to the composition of age and gender in the survey areas

Fieldwork Wave 1: April 16-17, 2011
 Period

Question wording for quoted data.

It has been about a month since the earthquake struck on March 11. What areas, if any, are you currently have concerns/unease about?

Compared to before the earthquake, how has your spending on each item changed? Assuming the level of spending before the earthquake was "0", please select how much your spending on each item has changed (11 point scale)

It has been about a month since the earthquake struck on March 11. What areas, if any, are you currently have concerns/unease about?

Compared to before the earthquake, how has your spending on each item changed? Assuming the level of spending before the earthquake was "0", please select how much your spending on each item has changed (11 point scale)

How do you expect your spending on each item to change in the next 3 months until July? Assuming the level of spending before the earthquake was "0", please select how much you expect your spending on each item to change.

On Friday, March 11, a big earthquake struck in east Japan which heavily impacted people's lives, the Japanese economy, and many corporations. For the sake of the restructuring of quake-hit areas, some have commented on the necessity of resuming marketing activities, while others have also indicated the need for self-restraint. When do you think would be a good timing for companies to resume their marketing activities in order to boost restructuring and revive the Japanese economy.

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Source:<http://www.synovate.com/news/article/2011/04/post-earthquake-study-from-synovate-reveals-japanese-ready-to-actively-spend-to-boost-economy.html>

SUB-SAHARAN AFRICA

172-10. ANC Still Retains Majority Support

The African National Congress (ANC) remains the strongest political party in the country, although their support seems to have decreased since the 2009 general election. With the Local Government elections taking place on Wednesday (18 May), the issue of party support is getting a lot of attention. The ANC receives the majority of support among all South Africans 18 years and older, registered voters and likely voters, followed by the DA and then the IFP.

These results are from a special pre-election Socio-Political Trends survey conducted by Ipsos Markinor. Industry best practice demands that in the run-up to an election and particularly once an election campaign season starts, determining voter preferences or party support can only be done accurately among respondents who are likely to vote in the elections. Since more respondents say that they are likely to vote than what do vote in reality, it is common practice to use more than one filter question to establish whether a person is likely to vote or not. Ipsos Markinor employed the following filtering procedure to obtain the base of likely voters interviewed in the survey:

- The respondent must have been 18 years or older
- The interviewers made sure the respondent had a valid bar-coded, South African ID document
- The respondent must have been registered to vote in the upcoming elections.
- The respondent must have indicated that he or she is likely to vote
- The respondent must have indicated that he or she wants to vote in the upcoming elections

Although a total of 3 375 respondents, representative of the adult (18+) population of South Africa (thus all eligible to vote) were interviewed from mid-April 2011, the subset of this sample termed the "likely voter" is used to analyse political party support. A projected total of 24,123

million voters indicated that they are registered to vote, of these 19,778 million also indicated that they are likely to vote and want to vote.

The sample size of this “likely voter” subset was n=2050 and is representative of the likely voter universe in South Africa, which is more reflective of possible voter turnout come the election.

The interviews were conducted face-to-face, in the homes of the respondents and in the language of their choice. Results were weighted and projected to this universe.

When asking about preference for a political party, the question was phrased as: “*If there were Local Government elections tomorrow, which political party or organisation would you vote for?*”

Respondents are then handed a ballot paper and asked to draw a cross next to their party of choice.

This ballot paper contains the names of the biggest political parties in the country (as seen in previous surveys), their logos and acronyms. There is also space to write in another party name or other comments. The respondents are also permitted to spoil their ballot, which further simulates an actual election. Respondents are then required to place their completed ballot sheet in an envelope and hand it back to the interviewer, which ensures respondent anonymity. The results that follow are based on this ballot procedure.

When doing a national survey it is obviously not possible to predict accurately the number of seats that a party will win or the likely winner in each municipality in the country.

Political Party Support

If there were Local Government elections tomorrow, which political party would you vote for?

Political Parties	Support among all Registered voters	SUPPORT AMONG LIKELY VOTERS
	%	%
African National Congress (ANC)	56.6	58.9
Democratic Alliance (DA)	19.3	19.3
Inkatha Freedom Party (IFP)	2.1	2.0
Congress of the People (COPE)	1.2	1.0
United Democratic Movement (UDM)	0.5	0.3
African People's Convention (APC)	0.8	0.9
African Christian Democratic Party (ACDP)	0.7	0.6
Minority Front (MF)	0.6	0.4
Pan Africanist Congress (PAC)	0.3	0.3
AZAPO	0.2	0.1
Freedom Front Plus (FF+)	0.2	0.1
Christian Democratic Alliance	0.2	0.2
National Alliance	0.2	0.2
African Muslim Party (AMP)	0.1	0.1
United Christian Democratic Party (UCDP)	0.1	0.1
Any other party	0.7	0.8
Don't know/unsure	3.2	2.7
None/not answered	7.7	7.4
Spoilt ballot	1.9	1.8
Refused	3.4	2.8

Source: <http://ipsos-markinor.co.za/news/political-party-support>

EAST EUROPE

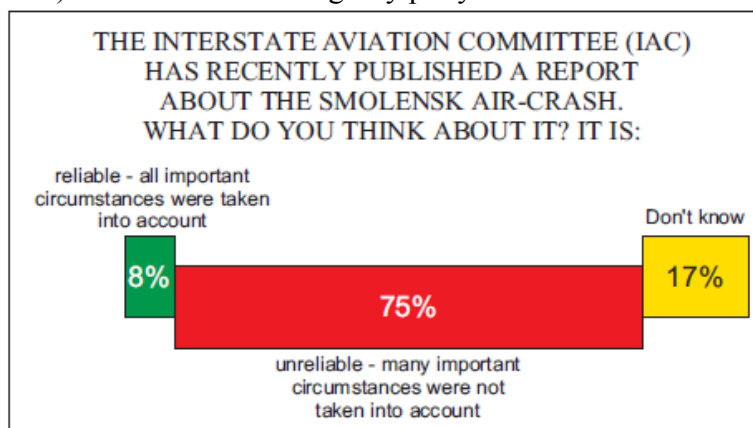
172-11. Polish - Russian Relations

The recurring subject in Polish - Russian relations for the last twelve months has been the Smolensk air-crash, in which many prominent Polish politicians (including President Lech Kaczyński) were killed. In May 2010 - shortly after the crash - Poles assessed the attitude of both countries to each other exceptionally well. However, the investigation into the reasons of the disaster in the months following the accident resulted in weakening the positive view of Polish – Russian relations. Despite that, they were still believed to be better than in the last decade. Yet, the report published by the Interstate Aviation Committee (IAC), which pointed to Poland as the only guilty party, contributed to further deterioration in this view. Presently, it returned to the level before April 2010. On the whole, the two countries' relations are now perceived as average (43% - a 3 point fall since September) or bad (42% - a 14 point increase). Few claim that Polish-Russian relations are good (12% - a 7 point fall).

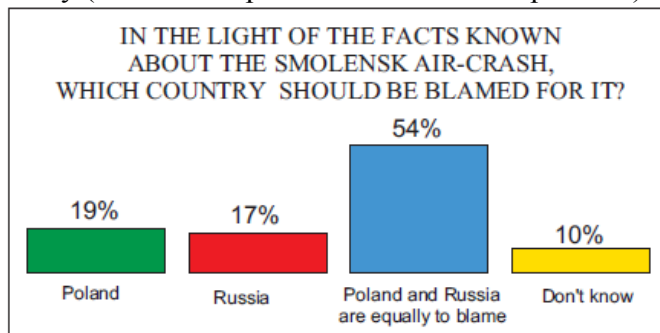


The report about the reasons of the air crash published by IAC was not received enthusiastically by the Poles. Three quarters of respondents (75%) believe it is faulty, i.e. it does not take into consideration many crucial circumstances.

Contrary to what has been stated in IAC's report, more than a half of Poles (54%) claim that Poland and Russia are equally to blame for the disaster. The remaining respondents can be divided into two - almost even - groups. Nearly every fifth (19%) blames Poland and one out of six (17%) claims Russia is the guilty party.



At first, steps taken by Russia to explain the reasons of the crash were perceived relatively well by Polish public opinion. However, already in September 2010, opinions about it began to shift. After IAC's report was published, a vast majority of respondents assess Russian actions negatively (71% - a 15 point increase since September).



The two parties with largest public support – the ruling Civic Platform (PO) and the main opposition party - Law and Justice (PiS) are widely different in what the right approach to Russia is. These differences are well reflected in the public perception of the attitude of PO and PiS to Russia. In case of PO, respondents most frequently claimed (44%) that the party is too lenient. Somewhat fewer people said it was appropriate (36%). However, with regard to PiS, the majority of Poles (68%) stated that their attitude is too confrontational.

Source: http://www.cbos.pl/PL/publikacje/public_opinion/2011/03_2011.pdf

WEST EUROPE

172-12. User Language Preferences Online

May 2011

The Flash Eurobarometer *User language preferences online* (Flash No 313) was conducted to examine Internet users' attitudes and opinions towards the use of different languages on the Internet. In detail, the survey examined:

- Languages, other than respondents' own, that are used on the Internet: (a) when reading or watching content on the Internet, and (b) when writing on the Internet
- Use of a language, other than respondents' own, for different Internet activities
- Opinions about the availability of websites in several languages

The survey obtained interviews – fixed-line, mobile phone – with nationally representative samples of Internet users (aged 15 and older) living in the 27 Member States. The target sample size in all countries was 500 interviews; in total, 13,752 interviews were conducted by Gallup's network of fieldwork organisations from January 28 to February 1, 2011.

Readers of this report should bear in mind that Flash Eurobarometer (No 313) only included Internet users and that the proportion of Internet users varied greatly between EU Member States:

- In countries, such as the Netherlands and Sweden, more than 90% of all individuals contacted during the survey's fieldwork reported having used the Internet in the four weeks prior to the survey. In other words, a survey among Internet users – such as this Flash Eurobarometer – covers almost the whole adult population of these countries.

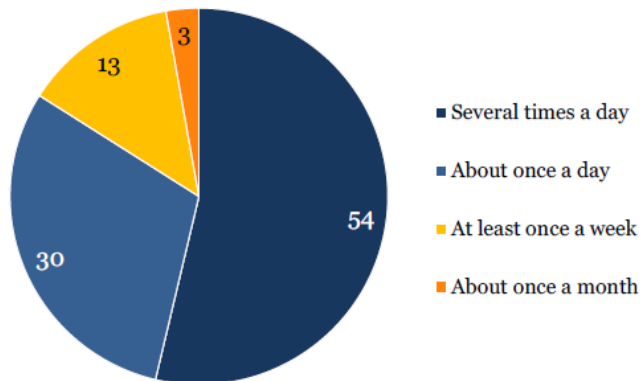
- Other countries, such as Greece, Romania and Bulgaria, had lower Internet penetration rates and less than half of all individuals contacted reported having used the Internet in the past four weeks. In these countries, the *population of Internet users* represents a selective group of the *total adult population* – a group of adults that was more likely to be male, younger, highly

educated and living in urban/metropolitan areas; in other words, a group of adults that was more likely to have literacy and language skills in a language, other than their own.

Main Findings

This survey interviewed **Internet users in the EU** about their language preferences when using the Internet. A large majority of respondents had used the Internet on a daily basis in the past four weeks: 54% said they had gone online *several times a day* in that timeframe and 30% said it had been *about once a day*.

Frequency of Internet use



S1. In the last four weeks, how often have you used the Internet – whether at home, at work, or somewhere else?
Base: all respondents, % EU27

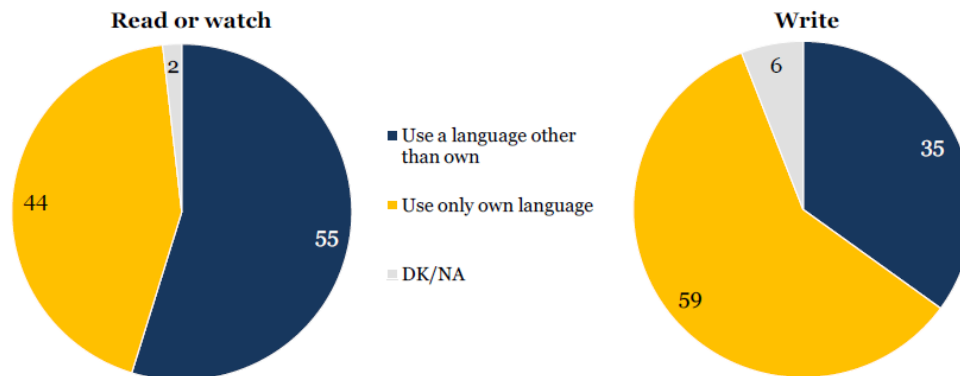
In almost all EU Member States, with the exception of Italy, at least 80% of Internet users said they had used the Internet on a daily basis in the four weeks prior to the survey (from 80% in Belgium to 91% in Slovenia). In Italy, 73% of respondents said they had used the Internet this frequently.

Languages, other than respondents' own, that are used on the Internet

A slim majority (55%) of Internet users in the EU said that they used at least one language other than their own to **read or watch content on the Web** and slightly more than a third (35%) used another language when **writing emails, sending messages or posting comments** on the Web.

In 23 of the 27 EU Member States, at least half of Internet users used a language other than their own to **read and watch content on the Internet**; this proportion ranged from 50% in Hungary to 90%-93% in Greece, Slovenia, Luxembourg, Malta and Cyprus. In Italy, the Czech Republic, Ireland and the UK, a majority of Internet users said that they only used their own language to read and watch content on the Internet (between 52% and 85%).

Languages, other than respondents' own, that are used on the Internet



Q4A. Which languages, other than your own, do you use to read or watch content on the Internet – and how often?
 Q4B. Which languages, other than your own, do you use to write (e.g. emails, comments, messages posted on a website) on the Internet – and how often?

Base: all respondents, % EU27

A similar picture emerged when looking at the proportions that used a language other than their own when **writing on the Internet**. Nonetheless, in all countries, Internet users were more likely to say that they used a different language than their mother tongue for reading or watching content than for writing on the Internet.

English was by far the most frequently used language, other than respondents' own, when going online: 48% of Internet users in the EU mentioned using English for reading or watching content on the Internet and 29% said the same for writing on the Internet. When looking at the frequency of using English on the Internet, it was noted that those who used this language *occasionally* outnumbered those who used it *frequently* or *all the time*.

Use of a language, other than respondents' own, for different Internet activities

The survey also found that Internet users – who used a language other than their own when going online – carried out several Internet activities in this language. For example, 81% of these respondents said they *at least occasionally* used another language when **browsing to get information, or when reading or watching the news**, 62% said they **communicated online with friends and acquaintances** in a language other than their own and 57% said the same for **searching and buying products and services** on the Internet.

In all EU Member States, browsing the Internet to get information, reading or watching the news and communicating with friends and acquaintances were mentioned by some of the largest proportions of respondents as online activities that they *at least occasionally* carried out in a language other than their own. Performing online banking operations, on the other hand, was the least popular online activity for respondents to carry out in a language other than their own.

Respondents' opinions about the availability of websites in several languages

Although 9 in 10 Internet users in the EU said that, when given a choice of languages, they always visited a website in their own language, a slim majority (53%) would **accept using an English version of a website if it was not available in their own language**.

Internet users in Cyprus and Malta were the most willing to use an English language website if this website was not available in their language (90% and 97%, respectively). Other countries with a high proportion of respondents willing to use an English language website were Slovenia (81%), Greece and Sweden (both 85%).

Almost 9 in 10 (88%) Internet users in the EU agreed that **all websites produced in their country should be available in their country's official languages**. At the same time, about 8 in

10 (81%) interviewees thought that all websites produced in their country should also have **versions available in other languages**. The total level of agreement for the former statement ranged from 73% in Sweden to 98% in Bulgaria and the proportion of respondents who agreed with the latter statement ranged from 50% in Finland to 96% in Greece.

Finally, more than 4 in 10 (44%) Internet users in the EU thought **they missed interesting information because websites were not available in a language they understood**. In Romania, Bulgaria, Portugal, Cyprus, Spain and Greece, a majority of respondents agreed with this statement (between 51%-60%).

Source: http://ec.europa.eu/public_opinion/flash/fl_313_en.pdf

172-13. In UK, Women and Less Educated More Negative on Workplaces

Women, less-educated, and younger workers report worse relationships with supervisors

May 18, 2011

WASHINGTON, D.C. -- British men and those in the United Kingdom with a college degree are among the most likely in their country to report being employed in a good work environment, according to the Gallup-Healthways Well-Being Index. Women, workers aged 30 to 44, and those with less education rate their work environments less positively.

Work Environment Wellbeing in the U.K. by Gender, Education, and Age

	Good work environment	Subpar work environment
OVERALL	36.6%	63.4%
GENDER		
Male	39.0%	61.0%
Female	34.3%	65.7%
EDUCATION		
Secondary education or less	34.8%	65.2%
Professional certificate/Some college	33.2%	66.8%
College degree or higher	40.9%	59.1%
AGE		
18-29	37.2%	62.8%
30-44	33.5%	66.5%
45-54	39.9%	60.1%
55+	39.2%	60.8%

Gallup-Healthways Well-Being Index (January-April 2011)

GALLUP*

Of British employees surveyed, 36.6% reported good work environments in the January-April 2011 Gallup-Healthways Well-Being Index tracking.

Gallup and Healthways determine workplace quality using the Work Environment Index, which includes four items that measure British workers' job satisfaction, their ability to use their strengths at work every day, their relationship with their supervisor, and whether their supervisor creates a trusting and open work environment. Those who respond positively to all four metrics are considered to have a good work environment. Those who do not do so are in a subpar workplace.

Women, Younger Britons, and the Less Educated Struggle With Supervisor Relationship

Women, younger workers, and those without a college degree lag behind on one key work environment metric in particular: They are more likely to say their supervisor treats them more like a boss than a partner. About half of respondents in each of those groups say this compared with less than half of men (42.7%), those with a college degree (40.9%), and older Britons.

"Does your supervisor treat you more like a boss or a partner?"

	Partner	Boss
OVERALL	42.7%	46.2%
GENDER		
Male	44.9%	42.7%
Female	40.6%	49.7%
EDUCATION		
Secondary education or less	40.8%	48.0%
Professional certificate/Some college	38.4%	49.7%
College degree or higher	49.1%	40.9%
AGE		
18-29	44.4%	49.6%
30-44	40.5%	51.1%
45-54	43.2%	40.9%
55+	45.6%	37.4%

Gallup-Healthways Well-Being Index (January-April 2011)

GALLUP

Men and older workers' advantages in their supervisor relationships hold even after controlling for one's education level.

The employee-supervisor relationship is the area where British workplaces are at the greatest disadvantage when compared with American workplaces. Out of all four work environment measures, it is also the item in which differences by gender, age, and education are greatest in the U.K.

Implications

The Gallup-Healthways Well-Being Index findings suggest that efforts to improve employee-supervisor relationships in U.K. workplaces -- especially for women, those with less education, and 30- to 44-year-olds -- could go a long way toward increasing workplace

wellbeing. In general, Britons are more likely than Americans to report workplaces that reflect a more traditional, hierarchy-based structure found in boss-subordinate relationships. That these perceptions are even more pronounced within certain groups gives leaders tangible evidence to act toward a more equitable environment of partnership.

About the Gallup-Healthways Well-Being Index

The Gallup-Healthways Well-Being Index tracks U.K. and 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-April 30, 2011, with a random sample of 2,118 adults, aged 18 and older, living in the United Kingdom, 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 ± 2.2 percentage points.

Interviews are conducted with respondents on landline telephones and cellular phones. Each daily sample includes a minimum quota of 5 cell phone respondents and 29 landline respondents, with additional minimum quotas among landline respondents for gender within the 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, education, region, adults in the household, cell phone status. Demographic weighting targets are based on the most recently published population data from the Census Bureau for Northern Ireland, Scotland, England, and Wales. 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.

Source:http://www.gallup.com/poll/147590/Women-Less-Educated-Negative-Workplaces.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Wellbeing

172-14. Disability In The Media

Published: 17 May 2011

Fieldwork: 11 - 17 March 2011

Findings from this survey of adults in Great Britain, conducted by Ipsos MORI on behalf of Mencap, reveal that the majority of the public is unable to name a high profile person with a disability. David Blunkett and Stephen Hawking are the most well known and Susan Boyle is the only public figure named who has a learning disability.

Over half the public (52 per cent) is unable to name a high profile person they have seen in the media with a disability, increasing to 99 per cent who are unable to correctly name someone with a learning disability. Labour MP, David Blunkett, who is blind, and theoretical physicist, Stephen Hawking, who has motor neurone disease, were the most frequently mentioned people with a disability in the poll (13 per cent each), followed by actor, Stephen Fry, who has bipolar disorder (8 per cent). Less than one per cent of respondents were able to correctly name a high profile person with a learning disability, namely the former Britain's Got Talent star, Susan Boyle.

The poll also revealed that a large segment of the public (41 per cent) believes that the number of people with a disability who they have seen, heard or read about in the media does not reflect that of society as a whole, versus those who do think it is reflective (21 per cent).

Almost half the public (44 per cent) are keen to see, hear or read more about people with disabilities in the media than there are at the moment with only a small minority (12 per cent) who disagreed.

Technical note

Ipsos MORI interviewed a representative sample of 1,029 adults aged 15+ across Great Britain. Interviews were conducted face-to-face over the period 11-17 March, 2011. Data are weighted to match the profile of the population.

Source:<http://www.ipsos-mori.com/researchpublications/researcharchive/2786/Disability-in-the-media.aspx>

NORTH AMERICA

172-15. Americans' Expectation for 2011 Peak Gas Price Rises to \$4.52

Majority think higher gas prices are permanent

May 19, 2011

PRINCETON, NJ -- Americans, who currently report paying an average price of \$4 per gallon of gasoline, expect prices to continue to rise to an average of \$4.52 this year. When Gallup last asked Americans about current and expected gas prices, in March, they were paying \$3.45 per gallon and expected to pay up to \$4.36. Thus, as gas prices have risen, so have Americans' expectations of how high they will rise, though the difference between current and expected prices is smaller now than in March.

About how much would you say you currently pay for a gallon of gasoline?

How high do you think the price of a gallon of gasoline will go in the area where you live this year?

	March 3-6, 2011	May 12-15, 2011
Current prices	\$3.45	\$4.00
Expected high	\$4.36	\$4.52
Difference	+0.91	+0.52

USA Today/Gallup

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The May 12-15 *USA Today*/Gallup poll finds that 9% of Americans think gas prices have peaked, with 84% expecting them to increase further, based on an analysis of the difference between respondents' reported current and expected prices. That includes 27% of Americans who think gas prices will rise 75 cents or more in their local area before the year is out.

In March, fewer (1%) thought gas prices had peaked, while 76% correctly predicted prices would rise at least 50 cents from what they were paying at that time.

Difference in Current Price Respondents Are Paying for Gasoline and Expected High for the Year

	March 3-6, 2011	May 12-15, 2011
Current price is the high for the year	1%	9%
Increase of \$0.01 to less than \$0.25	3	19
Increase of \$0.25 to less than \$0.50	12	21
Increase of \$0.50 to less than \$0.75	26	17
Increase of \$0.75 or more	50	27
No opinion	8	8
Mean increase	\$0.91	\$0.52
Median increase	\$0.76	\$0.40

USA Today/Gallup

GALLUP

Southern residents report paying slightly less for gas on average than those living in other parts of the United States. Western residents expect prices to jump the most from what they are currently paying, to an average of \$4.68 per gallon.

Current and Expected Gas Prices, by Region

	East	Midwest	South	West
Current prices	\$4.02	\$4.06	\$3.91	\$4.06
Expected high	\$4.44	\$4.55	\$4.46	\$4.68
Difference	+0.42	+0.49	+0.55	+0.62

USA Today/Gallup, May 12-15, 2011

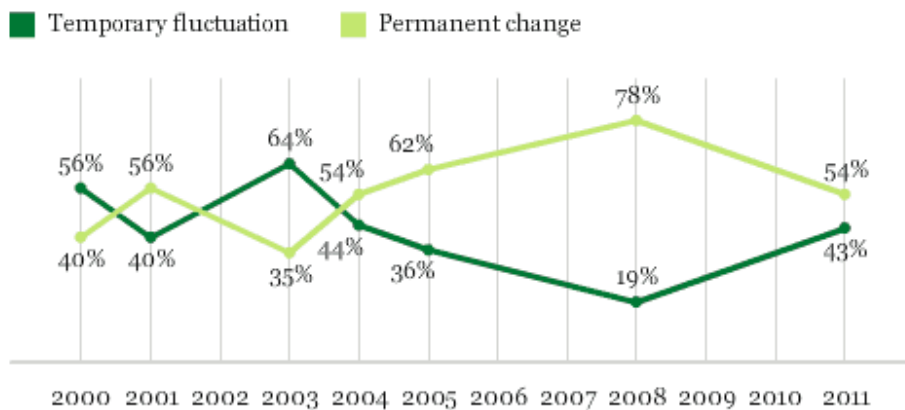
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Americans Believe Price Increase Is Permanent

The majority of Americans think the higher prices are here to stay, with 54% saying the price increases represent a permanent change, compared with 43% who believe they are a temporary fluctuation. That is a more optimistic assessment than in 2008, the year gas prices set a record, when 78% thought the increases were permanent.

Gallup has asked this question since 2000, and Americans have generally thought gas price increases were likely to be permanent in recent years. Prior to 2004, Americans were more inclined to see gas price hikes as temporary.

Thinking about the cost of gasoline, do you think the current rise in gas prices represents -- [ROTATED: a temporary fluctuation in prices, or a more permanent change in prices]?



Note: 2000, 2003, and 2004 data based on average of polls conducted in those years

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Americans in all four regions of the country think the price increases are permanent, ranging from 50% in the East to 59% in the West.

Democrats tilt toward thinking the increases are temporary, while Republicans and independents believe they are permanent.

Views of Gas Price Increases as Temporary or Permanent, by Region and Political Party

	% Temporary increase	% Permanent change
East	45	50
Midwest	41	57
South	46	51
West	39	59
Republicans	42	55
Independents	36	60
Democrats	52	46

USA Today/Gallup, May 12-15, 2011

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Implications

The average price Americans report they are currently paying for gasoline has risen more than 50 cents in the last two months, and the public is bracing for even higher gas prices. If their predictions come true, gas prices will easily exceed the historical record high from 2008.

Two-thirds of Americans say current gas prices have caused them hardship, and a majority say they have made major changes in their lives to deal with the higher prices.

Should the high prices persist, many more Americans will likely follow suit and alter their behaviors to cope with the increased cost of gasoline.

Survey Methods

Results for this *USA Today*/Gallup poll are based on telephone interviews conducted May 12-15, 2011, with a random sample of 1,024 adults, aged 18 and older, living in all 50 U.S. states and the District of Columbia.

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 and cellular phones, with interviews conducted in Spanish for respondents who are primarily Spanish-speaking. Each sample includes a minimum quota of 400 cell phone respondents and 600 landline respondents per 1,000 national adults, with additional minimum quotas among landline respondents for gender within region. Landline telephone numbers are chosen at random among listed telephone numbers. Cell phones numbers are selected using random digit dial methods. 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, and phone status (cell phone-only/landline only/both, cell phone mostly, and having an unlisted landline number). 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.

Source: http://www.gallup.com/poll/147638/Americans-Expectation-2011-Peak-Gas-Price-Rises.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Business%20-%20Northern%20America%20-%20USA

172-16. High Gas Prices Cause Lifestyle Changes for Many Americans

Slight majority report making major lifestyle changes, 67% experiencing hardship
May 18, 2011

PRINCETON, NJ -- The slight majority of Americans, 53%, say they have responded to today's steep gas prices by making major changes in their personal lives, while 46% say they have not. Sizable proportions of adults of all major income levels have made such changes, including 68% of low-income Americans, 54% of middle-income Americans, and 44% of upper-income Americans.

Lifestyle Impact of Higher Gas Prices on Americans

Next, we'd like you to think about how higher gas prices have affected you personally. Have you made any major changes to deal with rising gas prices, or not?

	Yes, have	No, have not
	%	%
National adults	53	46
\$75,000 or more	44	56
\$30,000 to \$74,999	54	45
Less than \$30,000	68	31
Employed	49	51
Not employed	58	40
Men	54	46
Women	53	46
18 to 34 years	57	42
35 to 54 years	51	49
55 and older	54	45

USA Today/Gallup, May 12-15, 2011

GALLUP

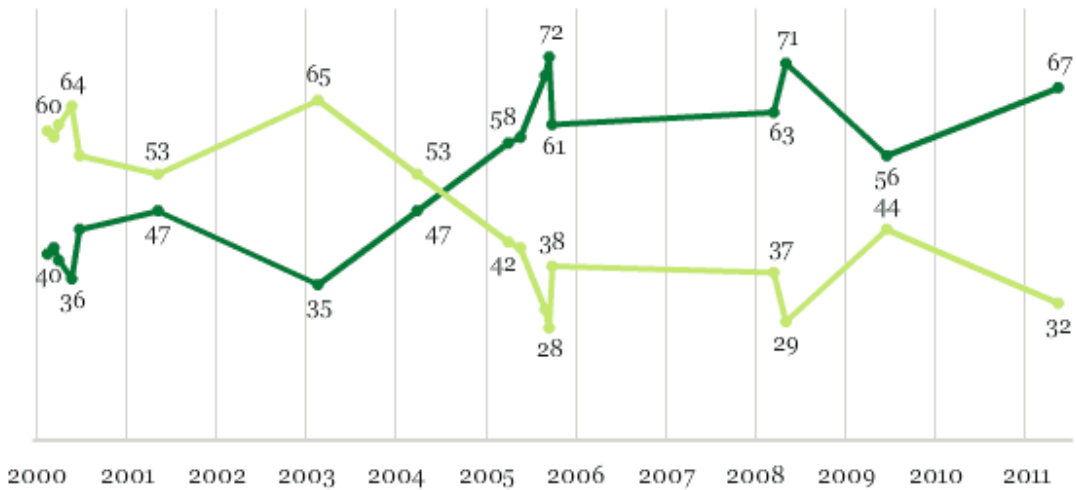
Although employed Americans are more likely to report driving an above-average amount -- and are thus greater consumers of gasoline -- they are less likely than non-employed Americans to have made major lifestyle changes to deal with rising gas prices, 49% vs. 58%. This likely reflects the higher average income of employed Americans, but may also indicate they have less flexibility in their lives to cut back on driving.

These findings come from a *USA Today*/Gallup poll conducted May 12-15, in which 67% of Americans say the recent high gas prices have caused them financial hardship, including 21% who say they have caused them severe hardship. This is among the highest levels of reported hardship Gallup has seen on this measure since 2000, and is similar to the 71% found when average gas prices nationwide topped \$4 per gallon in 2008 and the 72% when they first exceeded \$3 per gallon in 2005.

Impact of Recent Gas Price Increases on Personal Finances

Have recent price increases in gasoline caused any financial hardship for you or your household?

■ % Yes, caused hardship ■ % No, have not



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Americans Driving Less, Steering Toward Cars That Are More Fuel Efficient

Among the 53% of Americans who report having made major changes in their lives to deal with gas prices, the most common strategy, mentioned by a third of them, is simply driving less. Additionally, 16% specifically report they are cutting back on vacation travel, 15% are being more careful in planning errands and other local trips, and 15% have either purchased a more fuel-efficient vehicle or are looking into it. Smaller segments are doing less "leisure driving," carpooling, using public transportation, walking more, biking more, and driving more slowly.

Rather than driving less, 12% of those making major changes due to gas prices say they are cutting back on groceries, clothes, and other expenses to absorb the higher gas costs.

What are some of the specific major changes you have made?

Based on adults who have made major changes to deal with high gas prices (53%)

	May 12-15, 2011
	%
Drive less/Stay home more	32
Less travel/vacations	16
Getting a more fuel efficient car	15
Be more practical about errands/trips (fewer, closer to home)	15
Less leisure driving	12
Cut back on other expenses	12
Carpool	8
Change employer/school	6
Use public transportation	4
Walk more	3
Use a bicycle	3
Cut back on energy usage	2
Driving slower/less aggressively	1
Move to a more convenient location	1
Other	6
No opinion	1

USA Today/Gallup, May 12-15, 2011

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

GALLUP

Low-income Americans who have made major lifestyle changes due to high gas prices primarily report significant hardships, including driving less and cutting back on household expenses. By contrast, those in middle- and upper-income households are relatively more likely to report driving less for vacations and errands.

Additionally, while equal percentages of men and women say they are driving less in response to changes in gas prices, men are nearly twice as likely as women to say they have purchased or plan to purchase a more fuel-efficient car, 20% vs. 11%. Women, on the other hand, are twice as likely (16% vs. 8%) to say they have cut back on other household expenses.

The responses of adults who have made changes to deal with high gas prices vary by age, with those 55 and older much more likely than younger adults to say they have been more careful about running errands but less likely to say they are using a more fuel-efficient car.

Bottom Line

Average gas prices in the United States have increased by nearly \$1 a gallon since January, with half of that increase occurring since March. This increase has clearly caught Americans' attention, with 67% saying it has caused them financial hardship. Additionally, the slight majority of Americans report that they have made real changes in their lives to deal with high fuel costs. Driving less is the obvious, and most common, response, whether that be driving less

in general, cutting back on vacation travel, or consolidating errands. Additionally, some Americans, particularly those under 55, have switched to a more fuel-efficient car, while others, particularly lower-income Americans, have cut back on other household and living expenses to be able to put gas in their tanks.

Survey Methods

Results for this *USA Today*/Gallup poll are based on telephone interviews conducted May 12-15, 2011, with a random sample of 1,024 adults, aged 18 and older, living in all 50 U.S. states and the District of Columbia.

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.

For results based on the sample of 484 adults employed full- or part-time, one can say with 95% confidence that the maximum margin of sampling error is ± 5 percentage points.

Interviews are conducted with respondents on landline telephones and cellular phones, with interviews conducted in Spanish for respondents who are primarily Spanish-speaking. Each sample includes a minimum quota of 400 cell phone respondents and 600 landline respondents per 1,000 national adults, with additional minimum quotas among landline respondents for gender within region. Landline telephone numbers are chosen at random among listed telephone numbers. Cell phones numbers are selected using random digit dial methods. 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, and phone status (cell phone-only/landline only/both, cell phone mostly, and having an unlisted landline number). 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.

Source: http://www.gallup.com/poll/147593/High-Gas-Prices-Cause-Lifestyle-Changes-Americans.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Business%20-%20Northern%20America%20-%20USA

172-17. Anti-Incumbent Mood Against Congress Persists in 2011

Twenty-eight percent say most members of Congress deserve re-election

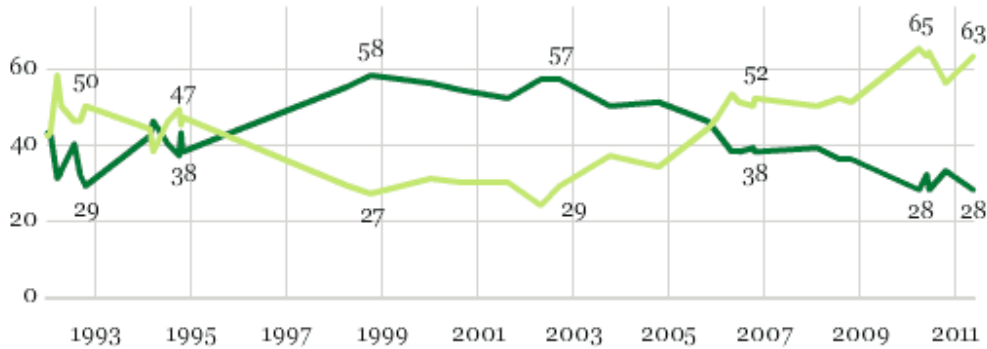
May 18, 2011

PRINCETON, NJ -- Twenty-eight percent of U.S. registered voters say most members of Congress deserve re-election, tying the low point in the trend set last year, according to a new *USA Today*/Gallup poll.

Please tell me whether you think each of the following political officeholders deserves to be re-elected, or not. How about -- most members of Congress?

Based on registered voters

■ % Yes, do ■ % No, do not



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In early May, Gallup found 24% of Americans approving of the job Congress is doing overall, which reflected a rally in support after the death of Osama bin Laden. Congress' approval rating had been below 20% in March and April. Nevertheless, voters' views of Congress in 2011 -- in terms of both approval and support for most members' re-election -- are no better than they were last year, despite the great turnover in the 2010 elections that led to Republicans' taking control of the House of Representatives.

Since 1992, Gallup has typically found more voters saying most members of Congress do not deserve re-election than saying they do. Generally, when higher percentages of voters express these anti-incumbent sentiments, as in 1992, 1994, 2006, and 2010, there is much change in Congress' membership at the next election.

Gallup usually asks the re-election question in election years, rather than in off-years, as is the case in the current poll. However, when Gallup has evaluated voters' willingness to support incumbents in the year before an election -- 2001, 2003, and 2005 -- the data have generally reflected what Gallup found in the succeeding election year.

Democratic voters are more likely than independent or Republican voters to say most members of Congress deserve re-election, even though Republicans now control the House of Representatives. Still, a majority of all three party groups believe most members should not be elected to another term.

Do Most Members of Congress Deserve Re-Election, by Political Party

Based on registered voters

	Republicans	Independents	Democrats
Yes, do	26%	23%	36%
No, do not	64%	69%	56%

USA Today/Gallup, May 12-15, 2011

GALLUP

The shift in party control has had an effect, however, as Republicans are more likely, and Democrats less likely, to say most members of Congress deserve re-election than either group was last year.

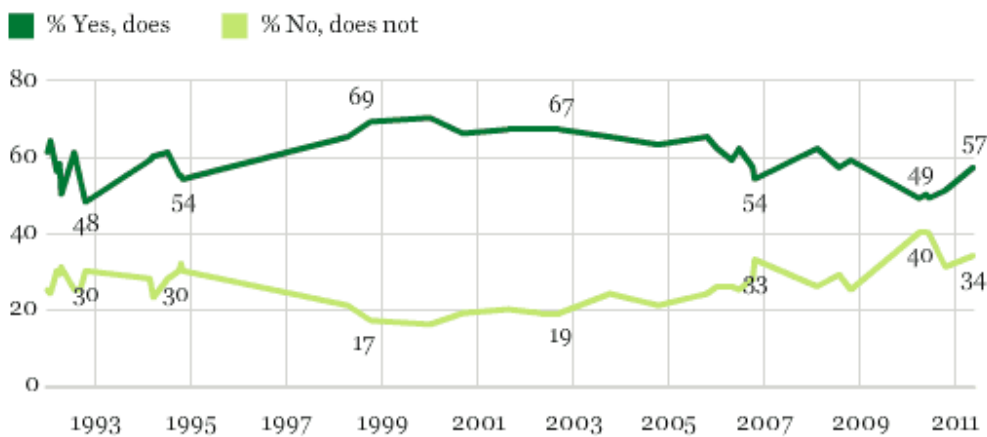
Most Voters Endorse Their Own Member's Re-Election

Voters are generally more inclined to say their own member deserves re-election than they are to say this about most members. The historical averages are 41% for most members of Congress and 59% for one's own member.

In the current poll, voters remain more charitable toward their own member of Congress, with 57% saying he or she deserves re-election. That is below the historical norm, but a significant improvement over what Gallup measured last year, when an average of 50% said their member deserved re-election. The all-time-low measurement was 48% in 1992.

Please tell me whether you think each of the following political officeholders deserves to be re-elected, or not. How about -- the U.S. representative in your congressional district?

Based on registered voters



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Republican voters are more likely than Democrats to say their own representative should get another term, with independents much less likely to say this than either major party. In fact, independents are about evenly divided in their views, while Democrats and Republicans show better than 2-to-1 margins in favor of re-electing their local representative.

Does Your Member of Congress Deserve Re-Election, by Political Party

Based on registered voters

	Republicans	Independents	Democrats
Yes, does	67%	48%	60%
No, does not	25%	47%	29%

USA Today/Gallup, May 12-15, 2011

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Implications

The anti-incumbent mood that led to sweeping changes in Congress after the 2010 elections persists, and the accompanying change in House leadership has not fundamentally altered the way Americans view Congress. Thus, incumbents remain vulnerable heading into the 2012 election cycle, though perhaps not quite as vulnerable as in 2010, given that voters are now more inclined to say their own member deserves re-election.

All incumbent members of the House will be running in newly drawn districts in 2012, further adding to the uncertainty about their future. But significant turnover in Congress may be the "new normal" pattern, given that it has occurred in each of the last three congressional elections.

Survey Methods

Results for this *USA Today*/Gallup poll are based on telephone interviews conducted May 12-15, 2011, with a random sample of 897 registered voters, aged 18 and older, living in all 50 U.S. states and the District of Columbia.

For results based on the total sample of registered voters, 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 and cellular phones, with interviews conducted in Spanish for respondents who are primarily Spanish-speaking. Each sample includes a minimum quota of 400 cell phone respondents and 600 landline respondents per 1,000 national adults, with additional minimum quotas among landline respondents for gender within region. Landline telephone numbers are chosen at random among listed telephone numbers. Cell phone numbers are selected using random digit dial methods. 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, and phone status (cell phone-only/landline only/both, cell phone mostly, and having an unlisted landline number). 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.

Interviews are conducted with respondents on landline telephones and cellular phones, with interviews conducted in Spanish for respondents who are primarily Spanish-speaking. Each sample includes a minimum quota of 400 cell phone respondents and 600 landline respondents per 1,000 national adults, with additional minimum quotas among landline respondents for gender within region. Landline telephone numbers are chosen at random among listed telephone numbers. Cell phone numbers are selected using random-digit-dial methods. 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, and phone status (cell phone only/landline only/both, cell phone mostly, and having an unlisted landline number). 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.

Source: http://www.gallup.com/poll/147605/Anti-Incumbent-Mood-Against-Congress-Persists-2011.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20Politics%20-%20USA

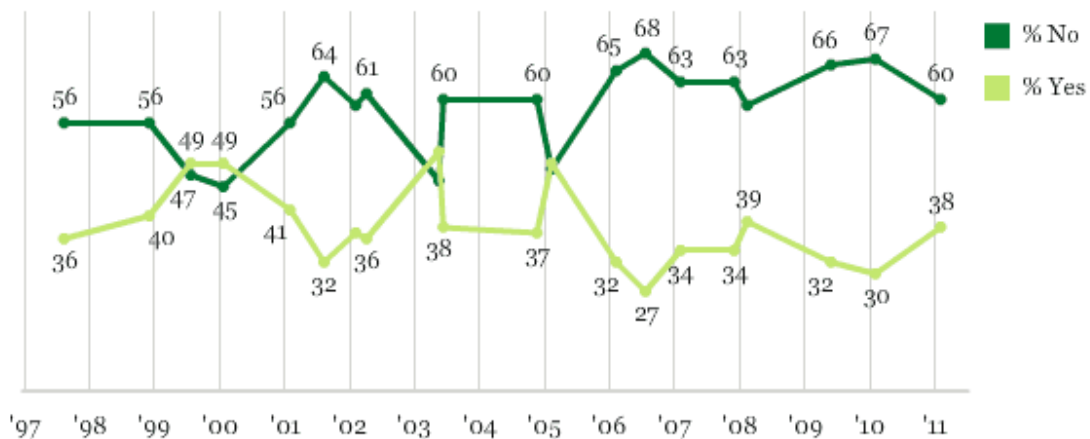
172-18. In U.S., Hopes for Arab-Israeli Peace Still Low, but Up Slightly

Democrats and young adults are most expectant that peace will come about
May 19, 2011

PRINCETON, NJ -- President Obama has revved up his call for Israeli-Palestinian peace talks this week in advance of his major Middle East policy address on Thursday and meetings with Israeli Prime Minister Benjamin Netanyahu on Friday. Gallup's annual update of Americans' outlook for the conflict finds 38% optimistic that Israel and the Arab nations will someday live in peace, but 60% are doubtful this will occur.

Outlook for Peace Between Israel and Arab Nations

Do you think there will or will not come a time when Israel and the Arab nations will be able to settle their differences and live in peace?



GALLUP

This year's result is based on Gallup's annual World Affairs survey, conducted Feb. 2-5, as the popular uprising in Egypt against former President Hosni Mubarak was in full swing. The 38% of Americans now optimistic about the chances for Mideast peace represents a minor rebound after the near-record-low outlook of 30% Gallup found in 2010. The absolute lowest, 27%, was recorded in July 2006 during the Israeli-Hezbollah war in southern Lebanon.

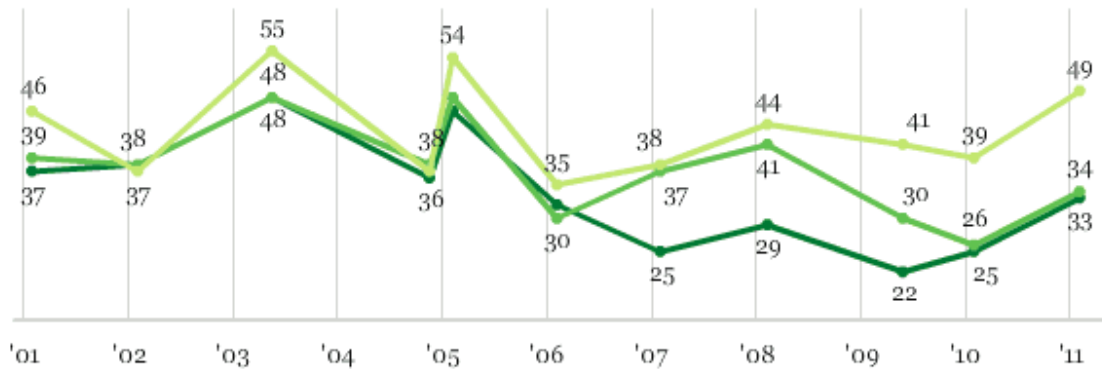
While Americans' optimism about Arab-Israeli peace has since remained low, it has shown longer-term variations, and has a history of rebounding -- particularly after the U.S.-brokered peace talks in 1999 and 2005.

All three party groups in the U.S. became a bit more optimistic about the chances for Arab-Israeli peace between February 2010 and February 2011. This includes a 10-point increase in the percentage of Democrats saying peace will come about (from 39% to 49%) and 8-point increases among Republicans and independents.

Outlook for Peace Between Israel and Arab Nations, by Party ID

% Yes, will come a time when they live in peace

■ Republicans ■ Independents ■ Democrats



Selected trend (one poll per year)

GALLUP

Since 2005, Democrats have tended to be the most optimistic on this question, but that has expanded in recent years, first with a decline in Republican optimism amid internal Palestinian violence between Fatah and Hamas factions, and then with independents' optimism declining after Obama took office in 2009.

Democrats' views about the conflict have been fairly steady since 2001, except for brief spurts of optimism in 2003 (after the appointment of Mahmoud Abbas as Palestinian prime minister) and in 2005 (coincident with a Palestinian-Israeli peace summit in Sharm el-Sheikh, Egypt, that led to a cease-fire). These increases in optimism were seen among all three party groups.

Among major American subgroups, only young adults are currently more likely than Democrats to believe Mideast peace will happen. In fact, a slight majority of adults aged 18 to 29 (55%) now believe peace will eventually come about, compared with roughly a third of all older age groups.

Bottom Line

Gallup polling on Mideast peace prospects since 1997 suggests Americans typically presume failure in the region unless real agreements at a peace table have recently been achieved, however temporal those have proved in the long term.

Today, the prospects for peace look as grim as ever, with President Obama's chief Mideast peace negotiator, George Mitchell, having recently tendered his resignation, and Palestinians and Israelis engaged in a new round of violent clashes. However, prior to these events, some Americans may have seen the youthful uprising in Egypt as emblematic of a broader demand for democratic reforms throughout the Middle East, and something that could result in a rapprochement with Israel. This could explain why optimism about the outlook for peace rose to 38% from 30% a year ago. Nevertheless, most Americans remain doubtful that peace is likely, and history suggests it will take much more than a verbal commitment to the peace process on the part of the U.S. president to change that.

Survey Methods

Results for this Gallup poll are based on telephone interviews conducted Feb. 2-5, 2011, with a random sample of 1,015 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, Hispanic ethnicity, education, region, adults in the household, and phone status (cell phone only/landline only/both, cell phone mostly, and having an unlisted landline number). 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.

Source:http://www.gallup.com/poll/147614/Hopes-Arab-Israeli-Peace-Low-Slightly.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Muslim%20World%20-%20Northern%20America%20-%20Politics%20-%20USA

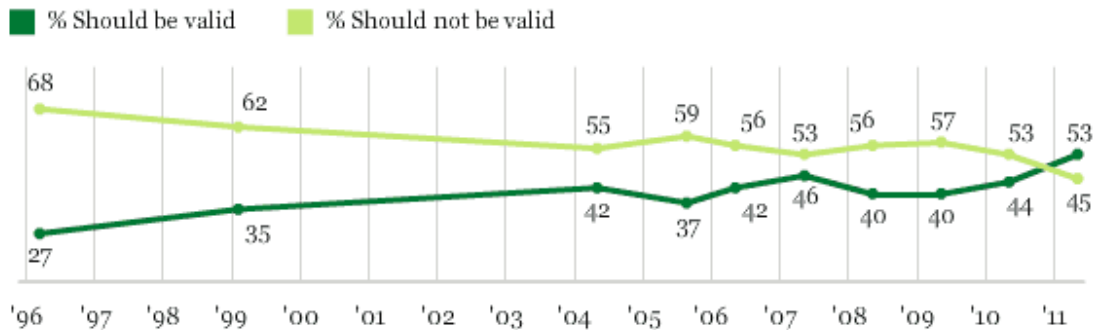
172-19. For First Time, Majority of Americans Favor Legal Gay Marriage

Republicans and older Americans remain opposed

May 20, 2011

PRINCETON, NJ -- For the first time in Gallup's tracking of the issue, a majority of Americans (53%) believe same-sex marriage should be recognized by the law as valid, with the same rights as traditional marriages. The increase since last year came exclusively among political independents and Democrats. Republicans' views did not change.

Do you think marriages between same-sex couples should or should not be recognized by the law as valid, with the same rights as traditional marriages?



Note: Trend shown for polls in which same-sex marriage question followed questions on gay/lesbian rights and relations
 1996-2005 wording: "Do you think marriages between homosexuals ..."

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These results are based on Gallup's May 5-8 Values and Beliefs poll, which has tracked attitudes toward legalizing same-sex marriage each year since 2004, adding to Gallup's initial polling on the topic in 1996 and 1999.

This year's nine-percentage-point increase in support for same-sex marriage is the largest year-to-year shift yet measured over this time period. Two-thirds of Americans were opposed to legalized same-sex marriage in 1996, with 27% in favor. By 2004, support had risen to 42% and, despite some fluctuations from year to year, stayed at roughly that level through last year.

Democrats' and Independents' Greater Acceptance Shifts the Balance

Democrats' and independents' support for legalized same-sex marriage increased this year by 13 and 10 points, respectively. Republicans' views on the issue did not change from last year. Clear majorities of both Democrats and independents now support gay marriage, 69% and 59% respectively, contrasted with 28% support among Republicans.

Majorities of moderates and liberals support gay marriage, as they did last year, contrasted with 28% of conservatives.

Support for Legal Same-Sex Marriage by Political Subgroup, 2010 vs. 2011

	% Should be legal, 2010	% Should be legal, 2011	Change (pct. pts.)
Democrats	56	69	13
Independents	49	59	10
Republicans	28	28	0
Liberals	70	78	8
Moderates	56	65	9
Conservatives	25	28	3

GALLUP

Support for Legal Same-Sex Marriage Decreases Sharply With Age

Support for legal gay marriage decreases markedly with age, ranging from 70% support among those aged 18 to 34, to 39% support among those 55 and older. More broadly, support is highest among younger women and lowest among older men.

Compared with last year, support for legalizing same-sex marriage increased most among younger, 18- to 34-year-old Americans, and among men under 50.

Support for Legal Same-Sex Marriage by Age and Gender, 2010 vs. 2011

	% Should be legal, 2010	% Should be legal, 2011	Change (pct. pts.)
18 to 34	54	70	16
35 to 54	50	53	3
55+	33	39	6
Men, 18 to 49	48	61	13
Men, 50+	32	35	3
Women, 18 to 49	58	65	7
Women, 50+	37	45	8

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Support for legal same-sex marriage is higher among those who attend church less frequently, among Catholics than among Protestants, and among those who are unmarried.

Implications

This year marks a significant uptick in support for legalizing same-sex marriage, exceeding the symbolic 50% mark for the first time in Gallup's history. Support rose from 27% in 1996 to the low 40% range in 2004 and remained fairly constant through last year.

The issue does, however, remain highly divisive. While big majorities of Democrats and young people support the idea of legalizing same-sex marriage, fewer than 4 in 10 Republicans and older Americans agree. Republicans in particular seem fixed in their opinions; there was no change at all in their support level this year, while independents' and Democrats' support jumped by double-digit margins.

Within the past year, Congress passed and President Obama signed a law allowing gay and lesbian members of the military to openly reveal their sexual orientation, rather than keeping it hidden as part of the "Don't Ask, Don't Tell" policy. A majority of Americans have supported such a change in policy since 2005, rising to two-thirds support in 2009 and again last year. It is unclear whether the highly publicized official change in government policy on Don't Ask, Don't Tell may have been a factor in the rise in Americans' support for legalizing same-sex marriage.

Most legislation dealing with legalizing same-sex marriage occurs at the state level. At this point, five states -- Connecticut, Iowa, Massachusetts, New Hampshire, and Vermont, plus the District of Columbia -- allow legal same-sex marriages. Most of the remaining states specifically outlaw it. At the moment, those advocating changes in constitutions and laws to allow same-sex marriage in additional states can take heart in the apparent shift in national sentiment in their direction.

Survey Methods

Results for this Gallup poll are based on telephone interviews conducted May 5-8, 2011, with a random sample of 1,018 adults, aged 18 and older, living in all 50 U.S. states and the District of Columbia.

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 and cellular phones, with interviews conducted in Spanish for respondents who are primarily Spanish-speaking. Each sample includes a minimum quota of 400 cell phone respondents and 600 landline respondents per 1,000 national adults, with additional minimum quotas among landline respondents for gender within region. Landline telephone numbers are chosen at random among listed telephone numbers. Cell phones numbers are selected using random digit dial methods. 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, and phone status (cell phone-only/landline only/both, cell phone mostly, and having an unlisted landline number). 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.

Source:http://www.gallup.com/poll/147662/First-Time-Majority-Americans-Favor-Legal-Gay-Marriage.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20Politics%20-%20USA

172-20. With Huckabee Out, No Clear GOP Front-Runner

Bachmann and Cain generate high positive intensity among those who know them
May 17, 2011

PRINCETON, NJ -- With Mike Huckabee out of the race for the 2012 GOP presidential nomination, three well-known politicians, Mitt Romney, Sarah Palin, and Newt Gingrich, emerge as leaders in Republicans' preferences. Republicans, however, have less intensely positive feelings about these three than they did about Huckabee. Two less well-known potential candidates, Michele Bachmann and Herman Cain, generate high levels of enthusiasm among Republicans who recognize them.

2012 Republican Candidates and Potential Candidates: Recognition, Ballot Position, Positive Intensity Scores

	% Name recognition among Republicans[^]	% Choosing in trial heat ballot, March-April 2011^{**}	Positive Intensity Score[^]
Mitt Romney	83	20	14
Sarah Palin	96	18	16
Newt Gingrich	84	11	13
Ron Paul	76	8	11
Michele Bachmann	58	5	21
Mitch Daniels	35	4	13
Tim Pawlenty	48	4	13
Rick Santorum	47	2	12
Jon Huntsman	25	2	9
Gary Johnson	21	1	1
Herman Cain	29	*	24

* Less than 0.5%

[^] Based on May 2-15, 2011, Gallup Daily tracking

^{**} Includes second choice for those selecting Huckabee or Trump

GALLUP[®]

The accompanying table displays potential Republican candidates' nomination support from March and April, based on reallocating choices of those who initially supported Huckabee or Donald Trump, and Positive Intensity Scores and name recognition for the two weeks ending May 15.

Republicans' nomination preferences at this point largely appear to reflect name identification. Palin, Gingrich, and Romney are the three best-known candidates, and they top the list of Republicans' preferences. Romney and Palin are essentially tied; Gingrich does slightly less well even though he and Romney have nearly identical name identification.

Ron Paul and Bachmann are the only other potential candidates with name recognition above 50%. They are also next in line in terms of Republican nomination support.

The remaining six candidates Gallup tracks -- Tim Pawlenty, Rick Santorum, Mitch Daniels, Cain, Jon Huntsman, and Gary Johnson -- have name recognition scores of less than 50% among Republicans. Each of them has less than 5% support in the March-April reallocated trial heat.

All in all, the basic pattern is clear: The most well-known candidates lead in nomination support at this point, while those who are not as well-known lag behind.

Positive Intensity Scores Control for Recognition

A review of the GOP candidates' favorable ratings and Positive Intensity Scores reveals their strengths once name identification is controlled for.

Republican candidates can be divided into three groups based on their recognition scores.

Group 1: Palin, Gingrich, and Romney

Republican Candidates: Recognition, Favorables, Positive Intensity

	Sarah Palin	Newt Gingrich	Mitt Romney
% Recognition	96	84	83
% Overall favorable opinion, among those who recognize	72	69	74
% Overall unfavorable opinion, among those who recognize	26	24	17
% Strongly favorable opinion, among those who recognize	23	17	17
% Strongly unfavorable opinion, among those who recognize	7	4	3
Positive Intensity Score*	16	13	14

* % Strongly favorable minus % strongly unfavorable
 May 2-15, 2011, Gallup Daily tracking

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- Palin, Gingrich, and Romney have roughly similar favorable percentages among Republicans who recognize them.
- Palin and Gingrich generate slightly higher negatives than does Romney.
- Palin's support is the most intense. A higher percentage of Republicans have strongly favorable opinions than is the case for the other two, giving her a slightly higher overall Positive Intensity Score despite her higher strongly unfavorable percentage.
- Gingrich and Romney have similar Positive Intensity Scores.
- The overall differences in Republicans' views of these three well-known candidates are not large.

Group 2: Paul and Bachmann

Republican Candidates: Recognition, Favorables, Positive Intensity

	Ron Paul	Michele Bachmann
% Recognition	76	58
% Overall favorable opinion, among those who recognize	64	71
% Overall unfavorable opinion, among those who recognize	25	16
% Strongly favorable opinion, among those who recognize	14	25
% Strongly unfavorable opinion, among those who recognize	3	3
Positive Intensity Score*	11	21

* % Strongly favorable minus % strongly unfavorable; Positive Intensity Score may not equal the difference between these two percentages because of rounding
 May 2-15, 2011, Gallup Daily tracking

GALLUP

- Paul receives lower favorables than the three candidates in the top tier, or compared with Bachmann. Paul's Positive Intensity Score is below average.
- Bachmann's image among those who recognize her is as positive as that of any candidate tested. Bachmann has low unfavorables, similar to Romney's.
- Bachmann generates as high a percentage strongly favorable as anyone tested in this analysis. **Bachmann's overall Positive Intensity Score of 21 is the highest of any of the better-known candidates, and overall is second only to that of the less well-known Cain.**

Group 3: Pawlenty, Santorum, Daniels, Cain, Huntsman, and Johnson

Republican Candidates: Recognition, Favorables, Positive Intensity

	Tim Pawlenty	Rick Santorum	Mitch Daniels	Herman Cain	Jon Huntsman	Gary Johnson
% Recognition	48	47	35	29	25	21
% Overall favorable opinion, among those who recognize	70	69	67	71	66	56
% Overall unfavorable opinion, among those who recognize	14	13	14	13	17	23
% Strongly favorable opinion, among those who recognize	15	14	13	25	10	4
% Strongly unfavorable opinion, among those who recognize	1	2	1	1	1	3
Positive Intensity Score*	13	12	13	24	9	1

* % Strongly favorable minus % strongly unfavorable; Positive Intensity Score may not equal the difference between these two percentages because of rounding

May 2-15, 2011, Gallup Daily tracking

GALLUP

- Pawlenty and Santorum are the best known of this group, with recognition scores just under 50%.
- Pawlenty and Santorum have similar favorable images among Republicans who recognize them (about average for the candidates).
- Daniels, who is less well-known, has an image profile among those who recognize him that is similar to those of Pawlenty and Santorum.

- The remaining three Republicans in this list -- Cain, Huntsman, and Johnson -- have name IDs in the 20% range.
- The exceptional individual in this group is businessman Cain. **He is recognized by 29% of Republicans and receives the highest Positive Intensity Score, based on those who know him, of any candidate measured.** One-quarter of those familiar with Cain have a strongly favorable view, and only 1% have a strongly unfavorable view.
- Huntsman and Johnson not only have low recognition scores, but at this point generate low levels of enthusiasm among those who do know them. Huntsman's Positive Intensity Score of 9 and Johnson's 1 are the lowest of any current or potential candidate. Trump, who has now indicated that he will not run, ended with a Positive Intensity Score of -1.

Summary: Where the Race Stands

There is no clear front-runner in the race for the 2012 Republican presidential nomination. Palin, who has given no indication of whether she will run for the nomination, has very high name identification, is near the top of Republicans' nomination preferences, and has a higher Positive Intensity Score than any other well-known candidate. **Palin thus must be considered one of the GOP leaders at this point.** Romney and Gingrich are also well-known. Of the two, Romney is slightly better positioned at this point due to his higher ranking in Gallup's trial heats.

None of these three, however, comes close to generating the positive intensity of Huckabee. Palin's Positive Intensity Score, at 16, is slightly higher than Romney's or Gingrich's, but is nine points lower than Huckabee's final May 2-15 score of 25.

Paul and Bachmann are next in line in terms of their name identification among Republicans, and round out Republicans' top five candidates in the trial-heat list. Bachmann continues to generate relatively intense positive feelings among those who recognize her. Her current Positive Intensity Score is the second highest of any candidate Gallup tracks, and higher than those of the better-known Republicans.

All other candidates and potential candidates Gallup tracks have name recognition below 50%. Only one of them, Cain, creates strong enthusiasm among those who recognize him.

The biggest challenge for those in the Republican field beyond Palin, Gingrich, and Romney right now is increasing their name recognition. Observers continue to point to candidates such as Pawlenty, Daniels, and Huntsman as potential challengers for the GOP nomination, but none of them is known by more than half of Republicans at this point. Additionally, none of these less well-known candidates or possible candidates, except for Cain, is generating unusual enthusiasm among those who do know them, which suggests their need to attract attention to their candidacies in the months ahead.

The challenge for Bachmann and Cain will be to maintain their strongly positive positioning as they become more widely known.

Survey Methods

Results are based on telephone interviews conducted as part of Gallup Daily tracking May 2-15, 2011, with random samples of Republicans and Republican-leaning independents, aged 18 and older, living in all 50 U.S. states and the District of Columbia. Questions asking about the 13 potential candidates measured in this research were rotated among randomly selected samples of Republicans each night; over the 14-day period, each candidate was rated by a minimum of 1,500 Republicans and Republican-leaning independents.

For the overall ratings of each potential candidate among Republicans and Republican-leaning independents, including recognition scores, one can say with 95% confidence that the maximum margin of sampling error is ± 3 percentage points. For the Positive Intensity Score for each candidate, the maximum margin of sampling error varies depending on the size of the group recognizing the candidate.

Interviews are conducted with respondents on landline telephones and cellular phones, with interviews conducted in Spanish for respondents who are primarily Spanish-speaking. Each sample includes a minimum quota of 400 cell phone respondents and 600 landline respondents per 1,000 national adults, with additional minimum quotas among landline respondents for gender within region. Landline telephone numbers are chosen at random among listed telephone numbers. Cell phones numbers are selected using random digit dial methods. 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, and phone status (cell phone-only/landline only/both, cell phone mostly, and having an unlisted landline number). 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.

Source: http://www.gallup.com/poll/147584/Huckabee-No-Clear-GOP-Front-Runner.aspx?utm_source=alert&utm_medium=email&utm_campaign=syndication&utm_content=morelink&utm_term=Americas%20-%20Northern%20America%20-%20Politics%20-%20USA

172-21. Is College Worth It?

College Presidents, Public Assess Value, Quality and Mission of Higher Education
May 15, 2011

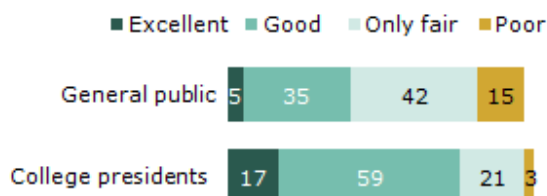
This report is based on findings from a pair of Pew Research Center surveys conducted this spring. One is a telephone survey taken among a nationally representative sample of 2,142 adults ages 18 and older. The other is an online survey, done in association with the Chronicle of Higher Education, among the presidents of 1,055 two-year and four-year private, public and for-profit colleges and universities. (See the our survey methodology for more information.)

Here is a summary of key findings from the full report:

Survey of the General Public

Is College a Good Value?

% who rate the job the higher education system is doing in providing value for the money spent by students and their families as ...



Note: Views from the general public (GP) are based on a Pew Research Center survey of 2,142 adults, March 15-29, 2011; views from the college presidents (P) are based on a Pew Research Center survey of 1,055 college presidents, March 15-April 24, 2011. "Don't know/Refused" responses not shown.

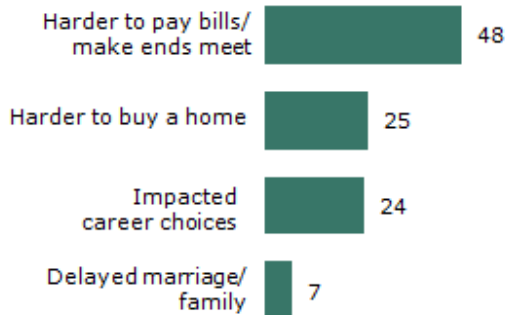
PEW RESEARCH CENTER GP/17, P/7

Cost and Value. A majority of Americans (57%) say the higher education system in the United States fails to provide students with good value for the money they and their families spend. An even larger majority (75%) says college is too expensive for most Americans to afford. At the same time, however, an overwhelming majority of college graduates (86%) say that college has been a good investment for them personally.

Monetary Payoff. Adults who graduated from a four-year college believe that, on average, they are earning \$20,000 more a year as a result of having gotten that degree. Adults who did not attend college believe that, on average, they are earning \$20,000 a year less as a result. These matched estimates by the public are very close to the median gap in annual earnings between a high school and college graduate as reported by the U.S. Census Bureau in 2010: \$19,550. A more detailed Pew Research Center analysis (see [Chapter 5, "The Monetary Value of a College Education,"](#) in the [full report](#) for more information) shows that this gap varies by type of degree and field of study.

How Student Debt Affects Borrowers

% of student borrowers who say having to pay back student loans had this impact on them



Note: Based on those who took out loans for postsecondary education and are not currently enrolled in school, n=332.

PEW RESEARCH CENTER GP/29

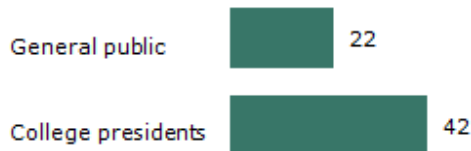
Student Loans. A record share of students are leaving college with a substantial debt burden, and among those who do, about half (48%) say that paying off that debt made it harder to pay other bills; a quarter say it has made it harder to buy a home (25%); and about a quarter say it has had an impact on their career choices (24%).

Why Not College? Nearly every parent surveyed (94%) says they expect their child to attend college, but even as college enrollments have reached record levels, most young adults in this country still do not attend a four-year college. The main barrier is financial. Among adults ages 18 to 34 who are not in school and do not have a bachelor's degree, two-thirds say a major reason for not continuing their education is the need to support a family. Also, 57% say they would prefer to work and make money and 48% say they can't afford to go to college.

Split Views of College Mission. Just under half of the public (47%) says the main purpose of a college education is to teach work-related skills and knowledge, while 39% say it is to help a student grow personally and intellectually; the remainder volunteer that both missions are equally important. College graduates place more emphasis on intellectual growth; those who are not college graduates place more emphasis on career preparation.

Is College Affordable for Most People Today?

% who agree



PEW RESEARCH CENTER GP/14, P/6

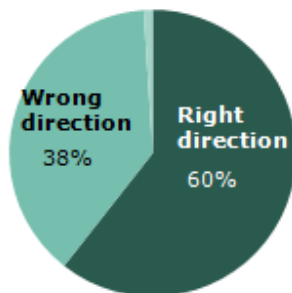
For Most College Graduates, Missions Accomplished. Among survey respondents who graduated from a four-year college, 74% say their college education was very useful in helping them grow intellectually, 69% say it was very useful in helping them grow and mature as a person, and 55% say it was very useful in helping them prepare for a job or career.

Above All, Character. While Americans value college, they value character even more. Asked what it takes for a young person to succeed in the world, 61% say a good work ethic is extremely important and 57% say the same about knowing how to get along with people. Just 42% say the same about a college education.

Survey of Presidents

Right Direction or Not?

Share of college presidents who say higher education in U.S. is headed in the ...



Note: "No answer" responses are shown but not labeled.

PEW RESEARCH CENTER P/1

Right or Wrong Direction? Six-in-ten college presidents say the system of higher education in this country is headed in the right direction, but a substantial minority (38%) say it is headed in the wrong direction.

Declining Student Quality. A majority of college presidents (58%) say public high school students arrive at college less well prepared than their counterparts of a decade ago; just 6% say

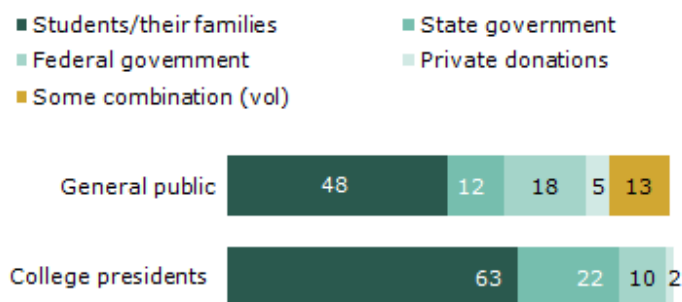
they are better prepared. Also, 52% of presidents say college students today study less than their predecessors did a decade ago; just 7% say they study more.

We're Not Number One. Only 19% of college presidents say the U.S. system of higher education is the best in the world now, and just 7% say they believe it will be the best in the world 10 years from now. Most presidents (51%) describe the U.S. system as one of the best in the world.

Doubts about Achieving Obama's Goal. Nearly two-thirds of college presidents (64%) say it is unlikely that, by 2020, the U.S. will achieve the goal set by President Obama to have the highest share of young adults with a college degree or certificate of any country in the world.

Who Should Pay for College?

% saying the largest share of students' college expenses should be paid by...



Note: The response categories of this question were slightly different in the two surveys because of the different survey modes. In the GP survey, which was conducted by telephone, a volunteered response of "some combination" was accepted. In the presidents' survey, which was conducted online, the volunteered option was not available. "Don't Know/Refused" or "No answer" responses not shown.

PEW RESEARCH CENTER GP/20a, P/27

Who Should Pay? Nearly two-thirds of college presidents (63%) say students and their families should pay the largest share of the cost of a college education. Just 48% of the public agrees. An equal share of the public would prefer that the bulk of the cost of a college education be borne by the federal government, state governments, private endowments or some combination.

Split Views of College Mission. Presidents are evenly divided about the main role colleges play in students' lives: Half say it is to help them mature and grow intellectually, while 48% say it is to provide skills, knowledge and training to help them succeed in the working world. Most heads of four-year colleges and universities emphasize the former; most heads of two-year and for-profit schools emphasize the latter.

Measuring Grade Inflation. Just over a quarter (27%) of college presidents say that the faculty at their own institution grades students too leniently. Only 1% says they grade students too stringently. The vast majority (73%) says students are graded about right.

Scant Enthusiasm for Faculty Tenure. Only a quarter (24%) of presidents say that, if given a choice, they would prefer that most faculty at their institution be tenured. About seven-in-ten say they would prefer that faculty be employed on annual or long term contracts.

Source:<http://pewresearch.org/pubs/1993/survey-is-college-degree-worth-cost-debt-college-presidents-higher-education-system>

172-22. Most Say Homosexuality Should Be Accepted By Society

May 13, 2011

**Support for
Acceptance of
Homosexuality**

<i>Homosexuality should be...</i>	March 2011 %
Accepted by society	58
Discouraged by society	33
Don't know	<u>8</u>
	100
<i>Gays and lesbians marrying legally...</i>	
Favor	45
Oppose	46
Don't know	<u>9</u>
	100

PEW RESEARCH CENTER 2011 Political
Typology. Figures may not add to
100% because of rounding.

While the public is divided over same-sex marriage, a majority of Americans (58%) say that homosexuality should be accepted, rather than discouraged, by society.

Among younger people in particular, there is broad support for societal acceptance of homosexuality. More than six-in-ten (63%) of those younger than age 50 -- 69% of those younger than age 30 -- say that homosexuality should be accepted. Far fewer of those ages 50 and older (52%) favor societal acceptance of homosexuality.

These are among the findings from the latest Pew Research Center political typology survey, released May 4, 2011. The survey, conducted in February and March of this year, showed that opposition to gay marriage has continued to decline.

Currently, 45% favor allowing gays and lesbians to marry legally while 46% are opposed. Two years ago, in April 2009, 35% supported same-sex marriage while 54% were opposed.

Views of Gay Parenting Less Negative

<i>More gay and lesbian couples raising children...</i>	Feb 2007	Jan 2010	Oct 2010	Mar 2011
	%	%	%	%
Good thing for society	11	13	12	14
Bad thing for society	50	42	43	35
Does not make much difference	34	40	41	48
Don't know	<u>5</u>	<u>4</u>	<u>4</u>	<u>3</u>
	100	100	100	100

PEW RESEARCH CENTER 2011 Political Typology, 2007-2010 trend from Pew Social and Demographic Trends. Figures may not add to 100% because of rounding.

Opposition to gay marriage has fallen by 19 points (from 65%) since 1996. (For more on changing public views of same-sex marriage, see Pew Research Center reports from [March 3, 2011](#) and [Oct. 6, 2010](#).)

The political typology survey also found a decline in negative views of the increasing number of gays and lesbians raising children. Today, 35% say that more gay parents is bad for society, 14% view this trend positively, while 48% say it does not make much difference. Four years ago, 50% viewed this trend negatively, 11% said it was a good thing and 34% said it made no difference.

Should Homosexuality be Accepted by Society?

	Accepted	Dis- couraged	Neither/ DK
	%	%	%
Total	58	33	8=100
Men	52	39	9=100
Women	64	28	8=100
White	58	35	7=100
Black	49	38	13=100
Hispanic	64	26	10=100
18-29	69	26	5=100
30-49	59	32	9=100
50-64	55	37	8=100
65+	47	42	12=100
College grad+	67	26	3=100
Some college	62	28	3=100
HS or less	51	40	2=100
Republican	40	53	8=100
Cons Republican	35	58	7=100
Mod/Liberal Rep	52	41	7=100
Independent	63	28	9=100
Democrat	67	25	7=100
Cons/Mod Dem	61	32	7=100
Liberal Democrat	81	14	6=100
Protestant	48	44	9=100
White evang	29	63	9=100
White mainline	65	28	7=100
Catholic	64	26	11=100
White Catholic	66	27	7=100
Unaffiliated	79	15	5=100
Northeast	69	24	2=100
Midwest	56	36	3=100
South	50	41	3=100
West	65	27	2=100

PEW RESEARCH CENTER 2011 Political Typology. Figures may not add to 100% because of rounding.

Gay Issues Still Politically Divisive

Majorities across most demographic groups say that homosexuality should be accepted by society. But there are wide political and religious differences in opinions on this measure. Two-thirds of Democrats (67%) and 63% of independents say that homosexuality should be accepted, compared with 40% of Republicans.

Among religious groups, substantial majorities of the religiously unaffiliated (79%), white Catholics (66%) and white mainline Protestants (65%) say that homosexuality should be

accepted. However, just 29% of white evangelical Protestants agree, while more than twice as many (63%) say homosexuality should be discouraged by society.

There also are gender and racial differences: More women than men favor societal acceptance of homosexuality (64% vs. 52%). Hispanics (64%) and whites (58%) are more supportive of this than are African Americans (49%).

Gay Parenting Viewed Less Negatively

Since 2007, the percentage saying that the increasing number of gay couples raising children is a bad thing has fallen from 50% to 35%. The proportion viewing this trend positively has changed very little (11% then, 14% today). Rather, there has been a substantial increase in the percentage saying it does not make much difference (34% in 2007, 48% today).

Impact of More Gay and Lesbian Couples Raising Children ...

<i>% saying bad thing for society...</i>	2007	2011	Change
	%	%	
Total	50	35	-15
White	51	34	-17
Black	52	45	-7
Hispanic	45	31	-14
18-29	47	28	-19
30-49	44	35	-9
50-64	52	35	-17
65+	62	46	-16
College grad+	42	25	-17
Some college	45	34	-11
HS or less	56	42	-14
Republican	70	53	-17
Democrat	39	28	-11
Independent	41	30	-11
Protestant	60	44	-16
White evang.	78	63	-15
White mainline	44	26	-18
Catholic	41	34	-7
White Catholic	42	31	-11
Unaffiliated	26	12	-14

PEW RESEARCH CENTER 2011 Political Typology, 2007 data from Pew Social and Demographic Trends.

While there continue to be sizable partisan differences in opinions about gay parenting, there has been an across-the-board decline in negative views. In February 2007, 70% of Republicans said that more gays and lesbians raising children was a bad thing for society. Today, 53% of Republicans express this view, while nearly as many say either it does not make much difference (42%) or is a good thing (4%). Just 30% of independents and 28% of Democrats view the trend toward more gay parents as a bad thing, down from 41% and 39%, respectively, four years ago.

The proportion of African Americans viewing this trend negatively has changed little since 2007; 45% now say more gay parents are a bad thing for society, which is little changed from

four years ago (52%). Negative views among whites and Hispanics have fallen 17 points and 14 points, respectively, over this period.

Gay Issues and the Political Typology

The political typology found that issues relating to homosexuality and gay rights are more divisive among core Democratic groups than among GOP groups.

Wide Differences among Democrats Over Homosexuality, Gay Marriage

Typology groups	Homosexuality should be...		Gays and lesbians marrying legally ...	
	Accepted	Discouraged	Favor	Oppose
	%	%	%	%
Total	58	33	45	46
Mostly Republican				
Staunch Conservatives	22	68	9	85
Main Street Republicans	35	60	23	72
Mostly Independent				
Libertarians	71	19	43	45
Disaffecteds	48	41	34	52
Post-Moderns	91	5	80	14
Mostly Democratic				
New Coalition Democrats	43	47	34	51
Hard-Pressed Democrats	49	41	32	57
Solid Liberals	92	3	85	13

PEW RESEARCH CENTER 2011 Political Typology.

Among Democratic groups in the typology, an overwhelming percentage of Solid Liberals (92%) say that homosexuality should be accepted by society; nearly as many (85%) favor gay marriage. Solid Liberals are more white, well-educated and less religious than most other typology groups. (For detailed descriptions of all nine typology groups, see "[Typology Group Profiles](#)").

By contrast, the two other Democratic groups -- Hard-Pressed Democrats and New Coalition Democrats, who are much more religious and less well-educated than Solid Liberals -- are divided over whether homosexuality should be accepted or discouraged. And only about a third in each group favors same-sex marriage (32% of Hard-Pressed Democrats, 34% of New Coalition Democrats).

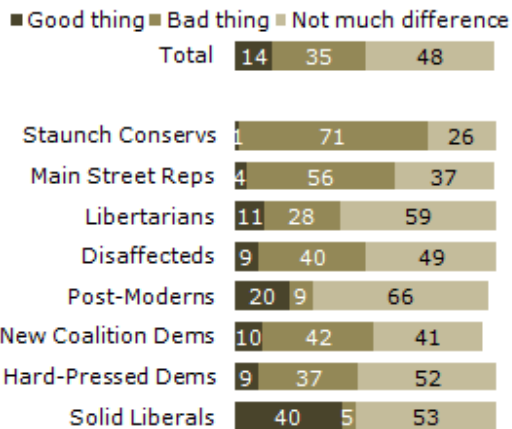
Both core Republican groups -- Staunch Conservatives and Main Street Republicans -- are highly religious; 91% of Main Street Republicans and 90% of Staunch Conservatives say that religion is personally very important. In both groups, large majorities say that homosexuality should be discouraged and oppose gay marriage.

The three independent groups differ widely in their views of whether homosexuality should be accepted and if same-sex marriage should be legal. Republican-leaning Libertarians have very conservative attitudes on economic issues, though much more liberal views on social issues. Fully 71% say homosexuality should be accepted, though far fewer (43%) favor gay marriage. Disaffecteds, another GOP-leaning group, are highly religious and express conservative views on

social issues. Only about half (48%) say homosexuality should be accepted and just 34% favor same-sex marriage.

Post-Moderns, who lean Democratic, are young, well-educated and not highly religious. Post-Moderns overwhelmingly think that homosexuality should be accepted by society (91% say this) and support same-sex marriage (80%).

More Gay and Lesbian Couples Raising Children ...



PEW RESEARCH CENTER 2011 Political Typology.

There are similar differences among typology groups in opinions about more gays and lesbians raising children. While 40% of Solid Liberals view this trend as good thing for society, just 9% of Hard-Pressed Democrats and 10% of New Coalition Democrats agree.

Majorities in the two core Republican groups express negative views about more gays and lesbians raising children: 71% of Staunch Conservatives say this is bad for society, as do 56% of Main Street Republicans.

But opinions are more mixed among the two GOP-leaning independent groups: Fewer than half of Disaffecteds (40%) and Libertarians (28%) view this trend negatively; 59% of Libertarians and 49% of Disaffecteds say it does not make much difference.

Roughly two-thirds of Post-Moderns (66%) say the increasing number of gays and lesbians raising children does not make much difference; fewer (20%) say this is a positive trend for society while just 9% say it is bad thing.

Source: <http://pewresearch.org/pubs/1994/poll-support-for-acceptance-of-homosexuality-gay-parenting-marriage>

AUSTRALASIA

172-23. Health Information Advisers and Seekers All Around Us

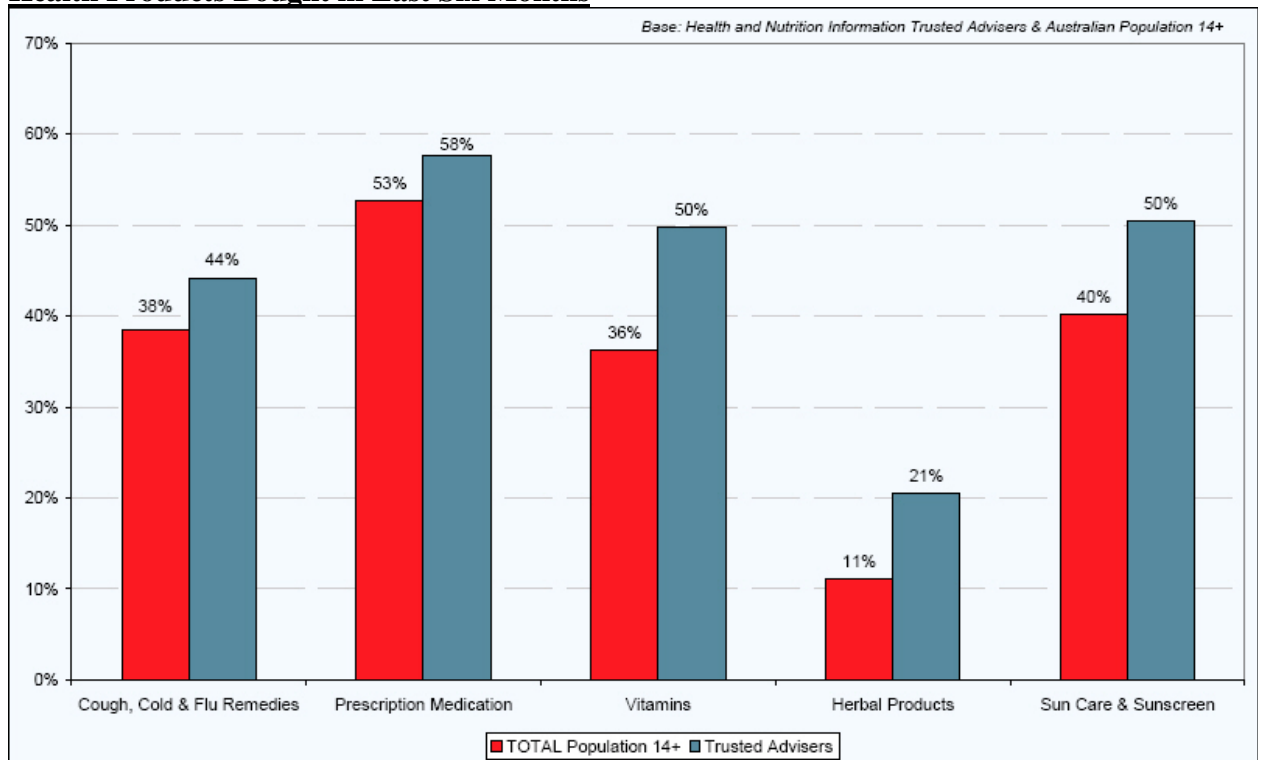
Article No. 1349 - Source: Roy Morgan Single Source, 12 month moving average Jan 10 – Dec 10, Trusted Advisers n = 3,880, Australian Population 14+ = 18,817.: May 20, 2011

In the 12 months to December 2010, an average of 22% of Australians were asked for advice on health and nutrition information by family and friends. Also, an average of 22% asked family and friends for advice on health and nutrition information, according to the latest Roy Morgan Research Health Monitor.

These ‘trusted advisers’ — those providing advice to family and friends on health and nutrition — are an important conduit to the rest of the population and are comprised of significant proportions of particular demographic groups. Overall, 64% of trusted advisers were women, 28% were aged 35-49, and 45% had a diploma or a degree.

As of December 2010, the proportion of ‘trusted advisers’ who bought herbal products in the last six months was almost double that of the general Australian population. Trusted advisers were also more likely to have purchased numerous other health products in the last six months compared with the general Australian population.

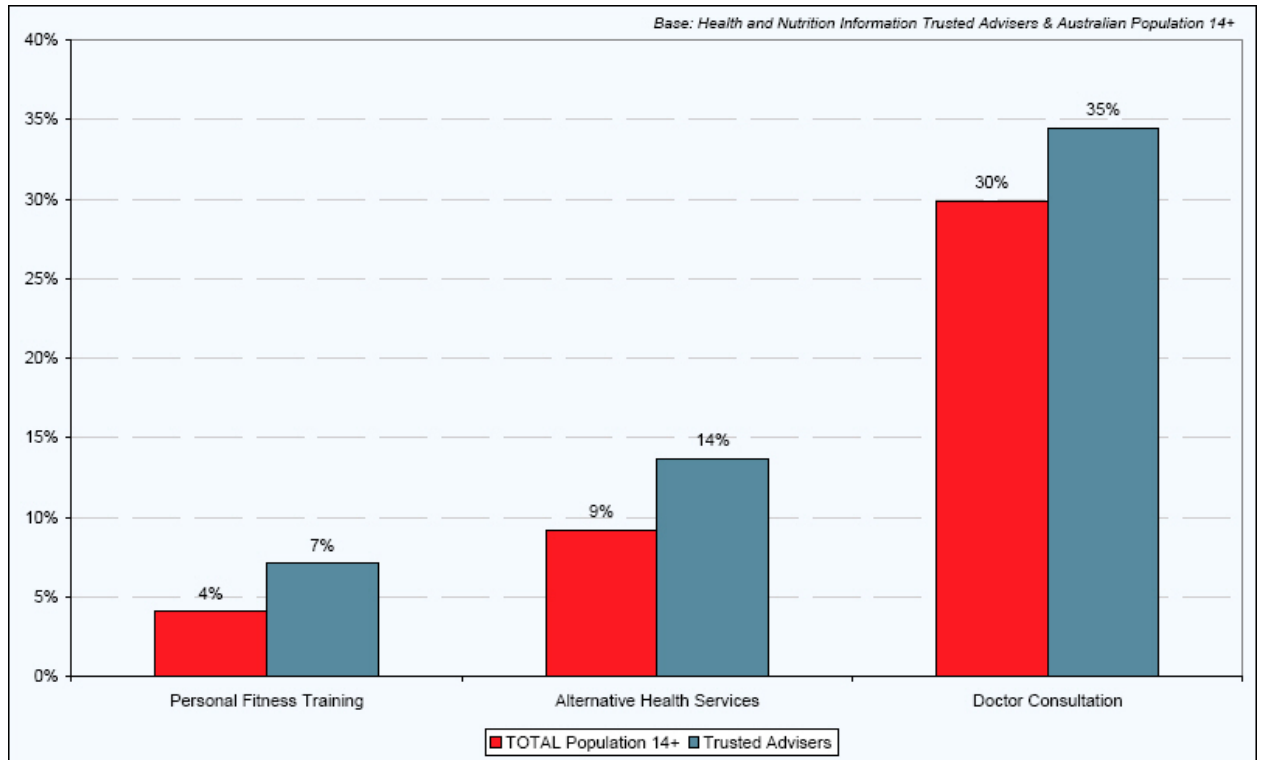
Health Products Bought in Last Six Months



Source: Roy Morgan Single Source, 12 month moving average Jan 10 — Dec 10, Trusted Advisers n = 3,880, Australian Population 14+ = 18,817.

Another large disparity existed in the use of personal fitness training, with 4% of the general Australian population paying for this service in the previous four weeks, compared to 7% of ‘trusted advisers’. This trend is also consistent with other health services as higher proportions of ‘trusted advisers’ paid for health services compared with the general Australian population.

Health Services Paid For In Last Four Weeks



Source: Roy Morgan Single Source, 12 month moving average Jan 10 — Dec 10, Trusted Advisers n = 3,880, Australian Population 14+ = 18,817.

Nick Williams, Healthcare Consultant at Roy Morgan Research says:

“It is clear that those who consider themselves trusted advisers on health and nutrition information are strong advocates of most health products, as is evidenced by large proportions having bought prescription medication, vitamins, and sun care products in the previous six months. Trusted advisers also appear more willing to spend money on health services than the general population.

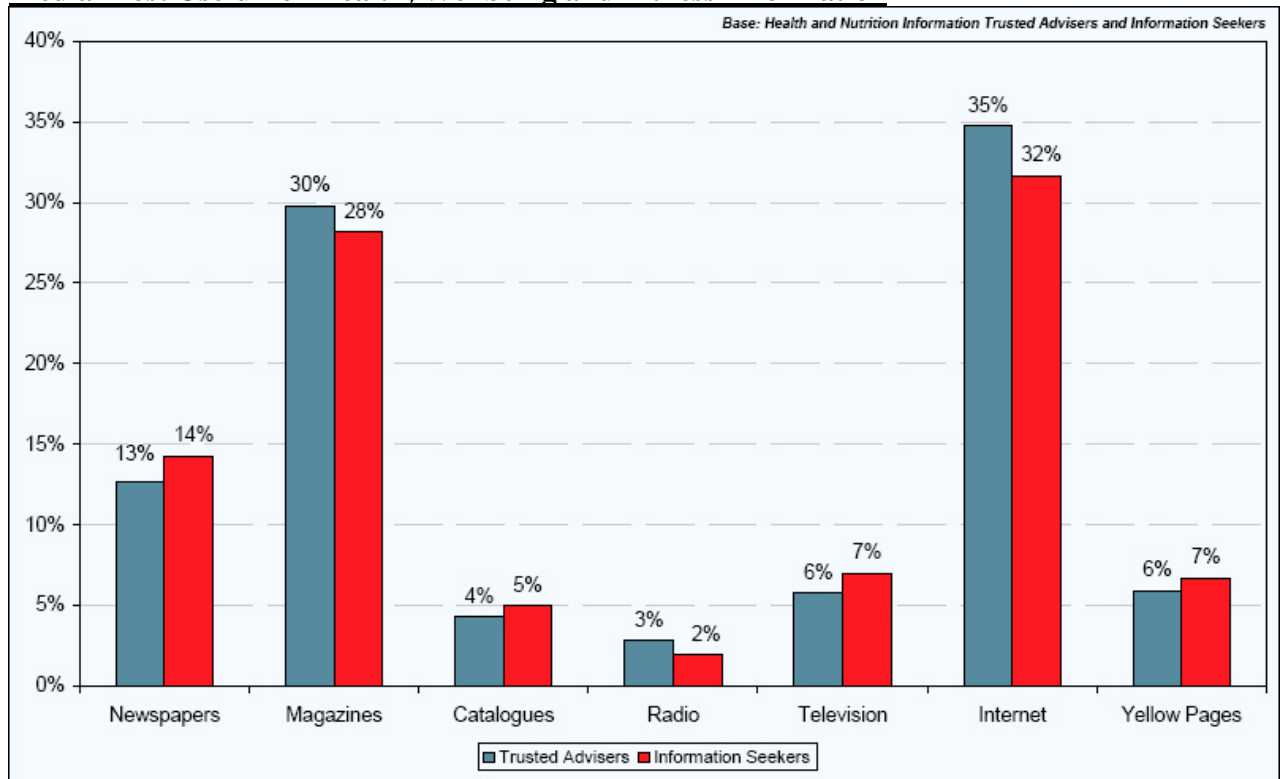
“Word of mouth can be a trusted and powerful source of information. Just over one-in-five of us are asked for advice on health and nutrition information by family and friends, and the same proportion seek out health and nutrition information among family and friends. This equates to large amounts of health related information being communicated within family and social circles.

“Trusted advisers on health and nutrition have a clear preference for the internet when sourcing information, with 35% nominating it as the most useful media for finding health related information. This was followed by 30% for magazines, and 13% for newspapers. The popularity of the internet likely reflects the ease and speed at which specific information can be obtained.

“Insights from Roy Morgan Research consumer poll data enable profiling of Advisers and Seekers of Health and Nutrition information across a spectrum of metrics and media preferences. This crucial information allows more efficient communication and reach with the people who are essentially the most influential brand advocates.”

Below are the media sources that ‘trusted advisers’ and ‘information seekers’ considered most useful for obtaining health, wellbeing and fitness information.

Media Most Useful for Health, Wellbeing and Fitness Information



Source: Roy Morgan Single Source, 12 month moving average Jan 10 — Dec 10, Trusted Advisers n = 3,880, Information Seekers n = 3,637.

About Roy Morgan Research

These findings are derived from Roy Morgan Research Single Source data. Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in New Zealand, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has more than 65 years’ experiences in collecting objective, independent information on consumers.

In Australia, Roy Morgan Research is considered to be the authoritative source of information on telecommunications & financial behaviour, readership, voting intentions 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 margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error 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%-</u> <u>60%</u>	<u>25%</u> <u>75%</u>	<u>or</u> <u>90%</u>	<u>10%</u> <u>95%</u>	<u>or</u> <u>5%</u> <u>or</u>
1,000	±3.0	±2.7		±1.9	±1.4
1,500	±2.5	±2.2		±1.5	±1.1
2,500	±1.9	±1.7		±1.2	±0.9
5,000	±1.4	±1.2		±0.8	±0.6
10,000	±1.0	±0.9		±0.6	±0.4
15,000	±0.8	±0.7		±0.5	±0.4
20,000	±0.7	±0.6		±0.4	±0.3
25,000	±0.6	±0.5		±0.4	±0.3

Source: <http://www.roymorgan.com/news/press-releases/2011/1349/>

MULTI-COUNTRY SURVEYS

172-24. Arab Spring Fails to Improve U.S. Image

Obama's Challenge in the Muslim World

May 17, 2011

As President Obama prepares to make a major address on the tumultuous changes spreading throughout the Middle East, a new survey finds that the rise of pro-democracy movements has not led to an improvement in America's image in the region. Instead, in key Arab nations and in other predominantly Muslim countries, views of the U.S. remain negative, as they have been for nearly a decade. Indeed, in Jordan, Turkey and Pakistan, views are even more negative than they were one year ago.

U.S. Favorability and Confidence in Obama

% Favorable

	2009	2010	2011	Change
	%	%	%	10-11*
Jordan	25	21	13	-8
Turkey	14	17	10	-7
Pakistan	16	17	11	-6
Indonesia	63	59	54	-5
Lebanon	55	52	49	-3
Egypt	27	17	20	+3
Palest. ter.	15	--	18	+3

% A lot/Some confidence

	2009	2010	2011	Change
	%	%	%	10-11*
Turkey	33	23	12	-11
Palest. ter.	23	--	14	-9
Indonesia	71	67	62	-5
Lebanon	46	43	43	0
Egypt	42	33	35	+2
Pakistan	13	8	10	+2
Jordan	31	26	28	+2

* Change from 2009 to 2011 in the Palestinian territories.

PEW RESEARCH CENTER Q3a & Q48a.

With the exception of Indonesia, Obama remains unpopular in the Muslim nations polled, and most disapprove of the way he has handled calls for political change roiling the Middle East. Moreover, many of the concerns that have driven animosity toward the U.S. in recent years are still present -- a perception that the U.S. acts unilaterally, opposition to the war on terror, and fears of America as a military threat. And in countries such as Jordan, Lebanon and Pakistan, most say their own governments cooperate too much with the U.S.

While the Arab Spring has not led to a change in America's image, it has generated considerable interest and excitement, especially in the Arab nations surveyed. More than 85% in Jordan, Egypt, the Palestinian territories and Lebanon have followed news about political demonstrations in the region, and in Arab countries there is widespread optimism that the protests will lead to more democracy. Most Israelis have also followed the political upheaval in neighboring countries, but they are divided over whether it will produce more democratic societies.

The survey, conducted by the Pew Research Center's Global Attitudes Project March 21-April 26, suggests the enthusiasm for democracy displayed by protestors in Tunisia, Egypt and elsewhere is consistent with public opinion in majority Muslim nations. (The survey was conducted prior to the May 2 death of Osama bin Laden, as well as the April 27 agreement between Hamas and Fatah to form a unity government in the Palestinian territories.) Democracy

is widely seen as the best form of government, especially in Lebanon, Jordan and Egypt, where more than seven-in-ten hold this view. Moreover, people in the Muslim nations surveyed clearly value specific features of a democratic system, such as freedom of religion, free speech and competitive elections. And publics in many Muslim countries increasingly believe that a democratic government, rather than a strong leader, is the best way to solve national problems.

Still, the embrace of democracy coexists with a strong desire for economic growth and political stability. Many prioritize a strong economy over a good democracy. And when they are asked about the key elements of a successful democracy, those in the surveyed nations place economic prosperity and political stability at the top of the list.

Support for Islamic Fundamentalism

Do you sympathize more with Islamic fundamentalists or with those who disagree with them?

	Islamic fundamentalists	Those who disagree	Both (Vol)	Neither (Vol)	DK
	%	%	%	%	%
Pakistan	47	15	3	10	25
Palest. ter.	37	28	14	17	5
Jordan	36	37	11	15	2
Egypt	31	30	11	15	14
Turkey	24	45	4	14	14
Israel	23	27	20	21	9
Indonesia	18	36	5	18	23
Lebanon	3	94	0	2	1

Asked of Muslims only.

PEW RESEARCH CENTER Q88.

Ideas about the role of Islam in society vary across Muslim nations. In Pakistan, Jordan and Egypt, solid majorities believe laws should be based strictly on the teachings of the Quran, while this is a minority viewpoint in Turkey, Lebanon, Indonesia and the Palestinian territories. Views about Islamic fundamentalism also vary widely -- in Pakistan for instance, Muslims tend to sympathize with fundamentalists, while Lebanese and Turkish Muslims favor those who disagree with fundamentalists.

The poll also highlights the extent to which extremism is rejected in Muslim nations, although there are notable levels of support for radical Islamist groups and suicide terrorism in some countries. Al Qaeda is rated negatively by majorities in all countries, but more than a quarter express a positive opinion of the terrorist group in the Palestinian territories. There is no country in which a majority rates the radical Palestinian organization Hamas positively -- still, it receives considerable support in Jordan and Egypt. Among the Palestinians themselves, Hamas is less popular than Fatah, its more secular rival.

Views of Extremist Groups

% Favorable

	Hamas	Hezbollah	al Qaeda
	%	%	%
Jordan	47	36	15
Egypt	45	24	21
Palest. ter.	42	61	28
Lebanon	34	38	3
Indonesia	33	37	21
Pakistan	13	14	--
Turkey	10	5	4

Pakistani views of al Qaeda not shown because the question was asked later in the survey, which may affect the comparability of results.

PEW RESEARCH CENTER Q3m-n & Q3p.

The militant Lebanese Shia group Hezbollah receives majority support only in the Palestinian territories. In Lebanon itself, views of Hezbollah reflect the sharp religious divisions within that society. While nearly nine-in-ten Lebanese Shia offer a positive view of Hezbollah, nine-in-ten Sunnis and three-quarters of Christians rate the organization negatively.

In recent years, Pew Global Attitudes surveys have documented a decline in support for suicide bombing in a number of countries, and today the percentage of Muslims who say this type of violence is often or sometimes justifiable stands at 10% or less in Indonesia, Turkey and Pakistan. Support for these acts is somewhat more common in Arab nations, although there have been steep declines over the last decade in Lebanon and Jordan.

Palestinian Muslims, however, remain an outlier on this question: 68% say suicide attacks in defense of Islam can often or sometimes be justified, a level of support essentially unchanged from 2007. And in Egypt, support for suicide bombing is actually on the rise -- currently, 28% believe it can be justified, up from 8% in 2007.

Source: <http://pewresearch.org/pubs/1997/international-poll-arab-spring-us-obama-image-muslim-publics>

CYBER WORLD

172-25. Indians Now Spend More Time On Social Media Sites Than On Personal Email

Social Media in India is growing at 100 percent and is likely to touch 45 million users by 2012.

One third of India's online consumers are aware of brands that have an online presence; over 50 percent of social media users perceive brands that have a social - media presence as being "innovative"

9 May 2011

Mumbai, India

Social Media has now become part of everyday life for a majority of online Indians. According to a study on social media usage by The Nielsen Company conducted in collaboration with AbsolutData, nearly 30 million Indians who are online consumers are members of social networking sites and about two-thirds of them spend time on these social networking sites daily. More importantly, Indians spend more time on social media than they do checking personal

email. According to the study, an equal number spend up to an hour on social networking and email. However while just 8% spend between an hour and three hours on personal email, 20% spend the same time on social media sites.

“Social media is now ingrained in the way tech savvy Indians live their lives. With its ability to play multiple roles in an individual’s life by enabling shared experiences, creating linkages between communities and satisfying the need to be networked, its role in creating a deeper engagement is a boon to marketing. Infact the study shows a third of online Indians access non traditional video outlets on the web for a range of activities “said Adrian Terron, Vice President, The Nielsen Company.

“The social web appears to have gone beyond supplementing communication. Online Indians today are using social media to facilitate activities that range from leisure like entertainment, improving their livelihood through job searches and researching prospective partners,” said Suhale Kapoor, EVP, AbsolutData.

Social Media gathers momentum as brands join the bandwagon

Social media is also gathering momentum rapidly. Based on the current rate of growth and the intention of online Indians to participate in social media, the study estimates that over the next six months 45,000 online Indians intend to join social networking sites each day.

When asked about the awareness of brands on social media, a fourth of online Indians were able to recall brands using social media. Of those consumers who are on social networking sites, a small but growing number claim to be following brands on these platforms.

“This indicates that no single brand ‘owns’ the social media space and that the opportunity to become a ‘social’ brand is overwhelming. Given that, having a social media presence connotes ‘innovation’ ‘customer friendliness’ and a sense of ‘cool’, brands should only ignore this aspect at their own peril” continued Terron.

Brand engagement through social media on the rise

Nearly 40 million Indians are using online reviews to inform purchase decisions – 67 percent of Indians who are on the web use online reviews to help them make purchases. As personal opinion gains currency on the social web, online users are seeking various outlets to express themselves, be it blogs or social media sites.

Increasingly, Indians also want brands to communicate with them using social media. 60 percent Indians who are social media users are open to being approached by brands indicating that social media has the ability to change the dynamic between brands and consumers who are typically time-starved and may consider traditional forms of advertising obtrusive and undesirable.

This emerging behavior points to the fact that brands need to deliver on consumer expectations much more than ever before, in a world where consumer opinion and brand advocacy, or criticism propagates through social networks much faster than ever before.

About the study

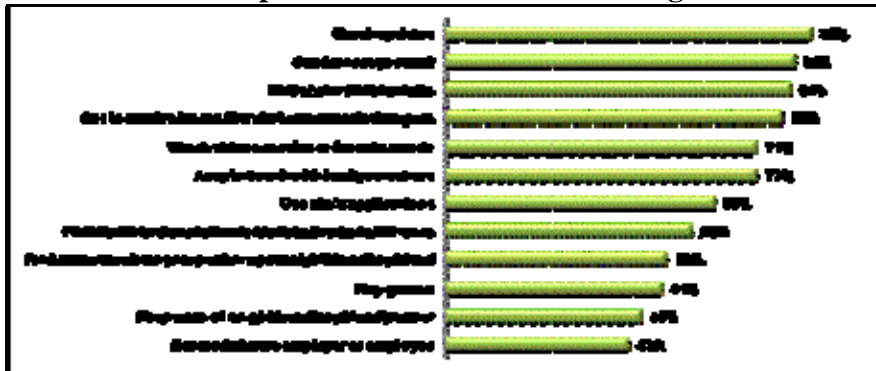
The study was conducted through on an online survey on a sample population of 2000 people from all walks of life spread across top five metros and Tier 1 cities in India. The survey was administered across the country via India Speaks, a proprietary internet based panel managed by AbsolutData Research & Analytics.

About The Nielsen Company

The Nielsen Company (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other

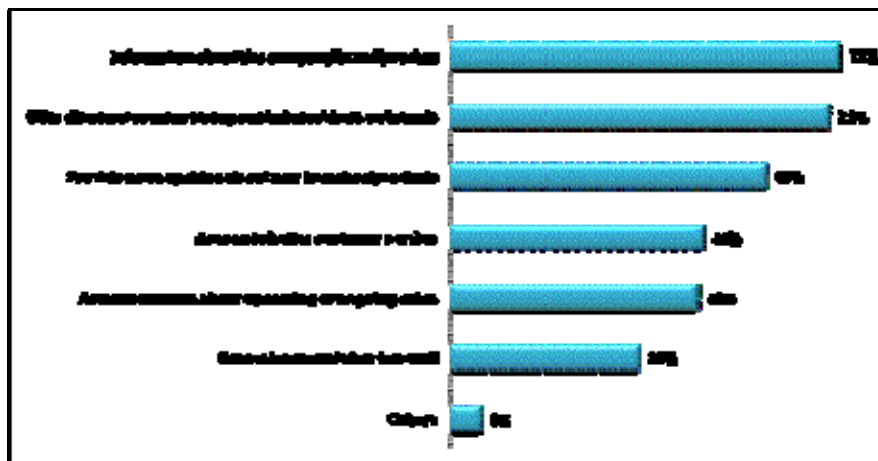
media measurement, online intelligence, mobile measurement, trade shows and related assets. The company has a presence in approximately 100 countries, with headquarters in New York, USA. For more information on The Nielsen Company, visit www.nielsen.com

Chart 1: Activities performed on social networking websites



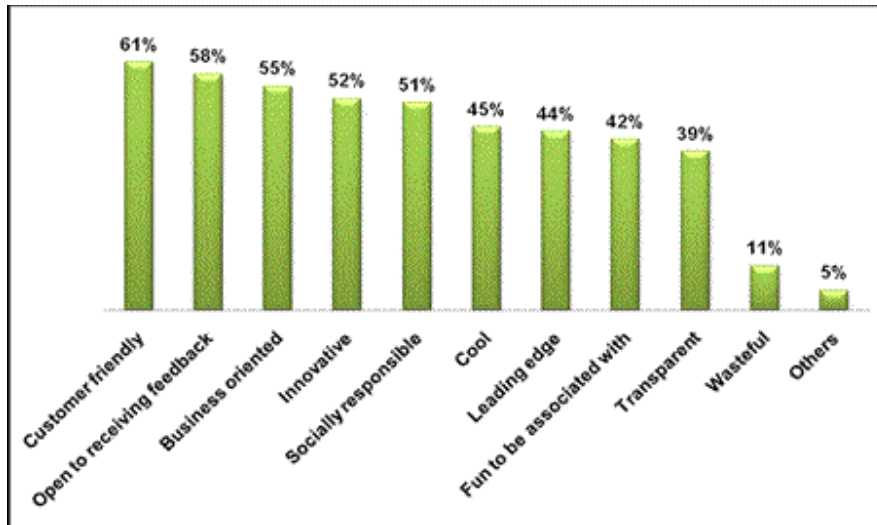
Source: The Nielsen Company, AbsolutData

Chart 2: Online offers consumers expect from Brands and Companies



Source: The Nielsen Company, AbsolutData

Chart 3: Qualities that describe brands/companies that have social media presence



Source: The Nielsen Company, AbsolutData

Source: <http://in.nielsen.com/news/20110509.shtml>

172-26. Mobile Banking Surges As Emerging Markets Embrace Mobile Finance

- Over 50% of consumers in rapid growth economies* want to use mobile phones for greater access to financial services

- Mobile phones set to become the ‘virtual debit card’ in rapid growth markets where demand exceeds developed markets by 18%

London – 12th May, 2011. Global use of ‘mobile finance’** surged in the past year as the spread of new technology and mobile banking infrastructure drove a huge increase in take-up rates around the world, new research from TNS, the world’s largest custom research company, reveals today.

In countries as diverse as China, Brazil and Kenya the number of new users of mobile banking soared over 100% in 12 months, as banks leapfrogged traditional service models and moved directly to mobile. The increases were not restricted to emerging markets alone though: take-up rates also surged in the UK, USA, Singapore, South Korea and Sweden where banks offered customers new services via their mobile handset. For example, people can manage their money from the mobile phone handset, via SMS message or smartphone app, and check their balances, move money between accounts, pay bills and, increasingly, buy goods and services.

Analysing the findings, James Fergusson, Global Technology Sector Head at TNS, said: “Mobile finance technologies have the tremendous capacity to be transformational in rapid growth markets, empowering consumers by giving them greater access to financial services.

“The necessity, marked interest and the blossoming mobile finance infrastructure means that countries such as Brazil and China have the right ingredients to drive mobile finance growth, not just in their own markets, but globally as well.”

South Africa’s growth was slower at 28%, no doubt due to mobile banking infrastructure only recently arriving – but already there are multiple offerings and it is likely that growth will be much faster this year.

The research has been released as part of TNS **Mobile Life**, an annual report on mobile consumer usage, and reveals a wealth of opportunities for banks, retailers and mobile service providers to develop for existing and potential customers.

Percentage increase in mobile banking usage from 2010 to 2011:

Country	Percentage of consumers using in 2010	Percentage of consumers using in 2011	Percentage Increase
China	10	25	150
Brazil	10	21	110
Kenya	6	18	200
USA	11	22	100
South Africa	10	12	28

In the UK the proportion of people using mobile banking increased from 9.7% in 2010 to 20.4% in 2011, while in the USA the rates from 11.4% to 21.9%. In Sweden it was greater still: 8.1% to 20%. In South Africa, it went from 9.7% to 12.4%.

And while adoption rates increased, desire for mobile banking in areas where it is not widespread is strong, peaking in sub-Saharan Africa, where almost two-thirds (63%) of mobile owners expressed an interest in mobile banking.

Bob Neuhaus, Global Finance Sector Head at TNS, said: “A significant proportion of the world’s population does not have access to banking services. Making mobile banking easy to access in these markets will not only help create a more sophisticated consumer marketplace and drive development of the banking sector, but also provides a huge opportunity for the mobile industry.”

“Our insights from the **Mobile Life** study demonstrate that in more mature markets, mobile banking is simply a matter of convenience, and largely an extension of the PC online experience – allowing the same online convenience, while mobile; however in developing markets mobile may provide an entry point to banking for millions of ‘unbanked’ people, in countries where banking infrastructure is poor, and banking restrictions create barriers.”

Emerging markets outpace the West in usage and demand for mobile wallet

Mobile money extends the concept by turning handsets into mobile wallets, capable of being loaded up with and storing money. As well as delivering new services in developed markets, mobile wallets can bring people without bank accounts (the unbanked) into the wider financial world and help drive economic and social development. The **Mobile Life** research shows that mobile wallet adoption has more than doubled across emerging markets, as they take advantage of the new opportunities it offers – a much higher take-up rate than in developed countries.

TNS **Mobile Life** demonstrates that developed countries such as the USA, Singapore and Hong Kong have made minimal progression in mobile wallet adoption over the past year. The USA moved from 6% in 2010 to 8% in 2011, Singapore increased from 10% to 13%, Hong Kong from 16% to 17%. In contrast, mobile wallet usage in Chile was below 1% in 2010, but has risen to 7% in 2011 - just one percentage point below the USA and higher than Australia (6%), France (5%) and the Netherlands (5%). South Africa more than doubled rising from 3% to 7%.

Percentage increase in mobile wallet usage from 2010 to 2011:

Country	Percentage of consumers using in 2010	Percentage of consumers using in 2011	Percentage Increase
China	9	21	133
Brazil	9	20	122
Kenya	10	25	150
USA	6	8	33
South Africa	3	7	133

China driving global mobile finance growth

The increased adoption and demand for mobile finance in China present a huge opportunity for companies to reach new customers. The financial services that capture the highest interest in China are paying bills (25%), getting money out of the bank (15%), and receiving wages (15%). China's usage of mobile wallet is already a considerable 52% above the global average and fewer than a quarter (23%) of Chinese consumers say they are not interested in mobile wallet.

"The past few years have shown us the tremendous potential for emerging markets to 'leap-frog' more developed markets in adopting new technology. Our findings from this research suggest that the uptake of mobile banking services is set to follow this trend," comments Fergusson. He concludes, "In countries across Sub-Saharan Africa, Latin America and Emerging Asia where there is high mobile phone prevalence, the lack of robust financial services and a need for efficient payment methods has contributed to very strong appeal for mobile finance. It's a logical fit."

Source: <http://www.tnsresearchsurveys.co.za/news-centre/pdf/2011/MobileBanking-%2012May2011.pdf>

172-27. UK Mobile Finance Market Doubles In 2011

16.05.2011 United Kingdom

One in ten UK consumers now use 'mobile wallet' whilst one in five use mobile banking

The use of 'mobile wallet' technology amongst UK consumers has more than doubled in the last 12 months with more than one in ten people now making payments via their mobile, says Mobile Life, a TNS research paper into use of mobiles in the UK. Moreover, one in five UK consumers now use their mobile to perform basic banking functions such as checking their account balance - also up more than 100% on last year.

Thanks largely to the surge in smartphone technology and the accessibility of such products to the wider market, in the UK 11.9% of consumers now use their mobiles to make payments online. The figure, up from only 5.9% twelve months ago, means more than one in ten of us now uses mobile wallet technology. The percentage of people who regularly bank via their mobile is now 20.4%, up from 9.7% in 2010, again demonstrating the rapidly growing adoption of mobile technology.

Mobile wallet technology allows the consumer to use their phone like a debit or credit card to pay for items online or in-store. It doesn't require a bank account and can be topped up with money to store in order to facilitate easy transactions at any time. Mobile banking encompasses

the more basic functions of online finance, like checking your account balance or making purchases securely, both of which can be performed either through apps or mobile internet.

Stephen Yap, Group Director at TNS Technology, said, “The huge increase in the use of mobile wallet technology in the UK shows the dramatic effect technology is having on our lifestyles. The incredible success of the smartphone is encouraging people to migrate many of their key online activities onto their mobile. In the last twelve months in particular the openness of the Android platform has increased handset competition and driven down prices, meaning that more and more people are able to use their handset as a payment tool.”

“As we become more familiar with smartphones and as mobile networks improve, we should see this number increase further, until mobile is the primary platform for most everyday online functions, including making payments,” said Yap. “Soon we could be seeing phones as our primary portals for all online needs, particularly as the growth of the cloud will place less emphasis on storage space and more on mobile access points.”

On the rise in mobile banking, Yap said, “The increase in mobile banking is a further proof point that mobile is the coming platform. Banks need to get their house in order to ensure that their mobile offer is as strong as their online one, as this could rapidly become a key differentiator for consumers.”

About TNS Mobile Life

www.discovermobilelife.com

Mobile Life is an annual investigation from TNS designed to provide a deep understanding of today’s global mobile device consumers and the future impact mobile will have on our digital landscape.

34,000* interviews with mobile users across over 43 countries (including the BRIC countries, Indonesia and several key African markets) provides real insight into how consumers across the world are using and interacting with mobile technology and delivers a holistic understanding of the end-to-end consumer experience and how this will change in the future.

Source: <http://www.tnsglobal.com/news/news-EEB44091E32047B588EC5F00C9DDC075.aspx>
