#### NOT TO BE PUBLISHED BEFORE 00:00 GMT April 19, 2011

#### **Recommended Press Release**

**Important note for Members:** The Board has decided that every country may customize (including branding issues) according to their local circumstances and legal requirements, and by making suitable mention of their country specific results. Detailed statistical Results are available in the compendium **Volume 1** providing Tabular Presentation of all **8 Questions**, country wise

## JAPAN EARTHQUAKE JOLTS GLOBAL VIEWS ON NUCLEAR ENERGY: Net favor globally falls from 25% to a mere 6%. However supporters continue to outnumber opponents by 49% : 43%

Note on Malaysia, Ghana, Lithuania and selected countries in the Middle East: Data from these countries will eventually be included in the Final Report as those were scheduled to arrive after April 15. Thus the number of countries in the survey will be larger than the present 47.



April 15, 2011

Fur further details please contact:

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## WIN-Gallup International GLOBAL SNAP POLL ON EARTHQUAKE IN JAPAN AND ITS IMPACT ON VIEWS ABOUT NUCLEAR ENERGY

(Embargoed until 00:00 GMT April 19, 2011)

# JAPAN EARTHQUAKE JOLTS GLOBAL VIEWS ON NUCLEAR ENERGY: Net favor

globally falls from 25% to a mere 6%. However supporters continue to outnumber opponents by 49%: 43%

Zurich / \_\_\_\_\_, April 19, 2011

JAPAN EARTHQUAKE JOLTS GLOBAL SUPPORT FOR NUCLEAR ENERGY: Net Favor falls 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% : 43%.

The sharpest fall in support comes from Japan itself where Net Favor fell by 41%: from 34% prior to the Earthquake to minus 7% in the aftermath of the earthquake and Tsunami which damaged Japanese nuclear power plants at Fukushima.

The survey was carried out by WIN-Gallup International, the world's largest and the oldest network of independent opinion pollsters.

## Global Shift in Opinion Caused by Japan Earthquake:

A sample of more than 34,000 statistically selected men and women across 47 countries all over the world were asked their views about Nuclear Energy as of today and the view they held prior to the Earthquake in Japan. As of the current survey (March 21-April 10), 49% globally say they hold favorable views about Nuclear Energy, however these supporters are pitted against 43% who say they hold unfavorable views, thus netting a NET FAVOR (favorable minus Un-favorable) of 6%. When the same group was asked: What was your view prior to Japan Earthquake, their responses added up to 57% favorable; 32% unfavorable netting to a NET FAVOR of 25%.

#### **Commentary:**

Commenting on this, an expert at WIN-Gallup International says: Nuclear Power had gained steady public opinion support during the last ten years and enjoyed a comfortably favorable majority of 57% in its support, while its opponents were far behind at 32%. Now that the gap has closed and they have become neck and neck at 49% (favor) and 43% (opposed) the nuclear debate is likely to heat up. The Fukushima Tsunami happened less than five weeks ago and the leakage question is still simmering. It is likely that as things cool down the Pros of Nuclear Energy will feel compelled to promote their case in order to mitigate the damage in public opinion support. It is a resourceful industry, besides the fact that it can make a strong case for being more environmentally friendly and less of a threat to climate change compared to competing fossil fuel energy sources. On the other hand the opponents of nuclear energy will increasingly focus on the Fukushima like security hazards, thus fuelling the debate.

It would be interesting, says the expert, to see how global public opinion shifts about Nuclear Energy (like the one pointed by this poll) would end up affecting not only international fuel prices but also market for renewable energy and world's Energy landscape in near future.

## Knowledge Abut Earthquake and Leakage

Not surprisingly 91% were aware of the Earthquake in Japan and 81% had also heard about the issue of Nuclear Leakages from the power plants at Fukushima. While the principal source of information happened to be the traditional media of Television, Radio and Newspapers, as many as 18% world-wide said they were keeping themselves updated on this historic disaster through the new media of Internet. The sample comprised a crosssection of people belonging to low, medium and high educational and income groups representative of their countries and belonged to urban as well as rural settings. The survey was one of the most representative of global population in the world.

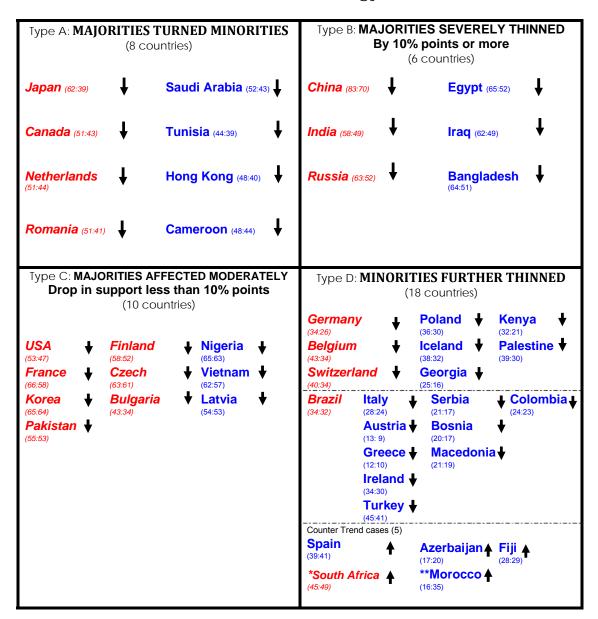
As Japan struggles with massive relief efforts to cope with one of the worst natural disasters in its history, that killed nearly thirty thousand of its citizens and displaced ten times as many more, the world asks the question: How will this disaster affect the Japanese? Will it succeed or fail in rebouncing to pre Earthquake levels soon. Expert opinions apart, the global popular opinion is on the whole optimistic of Japan's resilience to face this crisis. As many as 48% of those polled globally expect Japan to restore to pre-earthquake levels (30%) or even higher (18%). 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 and its close neighbors, South Korea, where 47% hold this view and China where 67% are pessimistic. These views may reflect a modesty in the Japanese and East Asian cultures about what they can achieve.

#### Five Types of Impacts on Various Countries:

A Matrix showing all 47 countries shows groups of countries where majority view in favor of nuclear energy turned into minority (Type A); majority view was severely thinned (Type B); majority view was moderately impacted (Type C) and countries where support for nuclear energy was already a minority, it was further thinned (Type D). Four countries with a counter-trend. In them the survey finds that support for nuclear energy rose modestly by 1-4% nuclear energy rose modestly (1-4% points). The case of public opinion in Morocco is a strong exception where the support rose considerably. We will treat it as an outlying case and wait to re-check the data before treating it as a valid finding. The Morocco data may please be read with that caution in mind.

The list of countries in each type is reproduced below for ease of communication.

## **MATRIX OF OPINION CHANGE**



on Nuclear Energy

Notes: \* In 4 countries support rose by a few % points: Spain (+4%), South Africa (+4%) Azerbaijan (+3%), Fiji (+1%) \*\* The case of Morocco is exceptional as an outlying case and a separate Note on that is in the text Analysis of Views in Countries with Nuclear Facilities for Electricity Generation: (Shows in Red in the Matrix above)

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 majority view in favor of nuclear energy declined to become a minority view. These are Japan, Canada, Netherlands and Romania.
- 2- 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**.
- 3- 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**.
- 4- In 4 of them views on nuclear energy were already held by a minority. These minorities shrank further. These include **Belgium**, **Germany**, **Switzerland** and **Brazil**. There is one country in this Group Spain in which support actually increased by 4%.
- 5- In one case, **South Africa**, support rose by 4%.

Survey findings show that Japan earthquake and the resulting fears of nuclear leakage caused decline in support for nuclear energy across board in counties where nuclear energy contributes to their economy and those where it does not.

In the pages ahead (page 7 to 15)

- 1- Summary and 2 Key Tables providing Country by Country Data (page 9 to 12 of this Document).
- 2- Available Methods Statement and Country Specific Contact Details at the end of this Document.

## **SUPPORTING DOCUMENTS**

- 3- For country by country Tabular Presentation of all Questions asked in the Global Snap Poll. See volume 1 (Tabular Presentation) separate attachment.
- 4- For **Background Literature Review Paper**, including Media Monitoring of Discussions about Nuclear Energy after Japan Earthquake in selected countries (will be available as a link on April 16, 2011)

## **SUMMARY FINDINGS**

Impact of Japan Earthquake on VIEWS ABOUT NUCLEAR ENERGY Findings from a Global Snap Poll in more than 47 countries by WIN-Gallup International (March 21-April 10, 2011)

#### 1- Knowledge About Japan Earthquake and Source of Information:

Globally 91% said they were aware of the recent Earthquake in Japan. 81% had heard about the issue of Nuclear Leakage. A majority was informed of the Earthquake and Nuclear Leakage through the Traditional media of TV, Radio and Newspapers. However for a notable 18% world-wide the principal source of information on this issue was the new media of Internet.

#### 2- Impact of Japan Earthquake on Views About Nuclear Energy:

Views on Nuclear Energy were seriously jolted by the Earthquake in Japan. Hundreds of millions of men and women world-wide say they have switched their views about the desirability of Nuclear Energy. Its Net Favor fell from 25% as reported to be held prior to the Earthquake to a mere 6% in its aftermath. The sharpest fall comes from Japan itself where net favor fell by 41% from a respectable 34% prior to the Earthquake to a negative -7% since then.

• Change in Global Views About Nuclear Energy:

When asked what was your view about Nuclear Energy prior to Japan Earthquake, 57% said they were very favorable or favorable, while 32% said they held unfavorable or very unfavorable views. Thus Net favor (Favorable minus unfavorable) was 25%. This figure dropped to 6% after the Earthquake and fears of Nuclear leakage at Fukushima.

#### • Global Views about Nuclear Energy before the Japan Earthquake:

	Globally	Japan
Favorable:	57%	62%
Unfavorable	32%	28%
Net Favor	(25%)	(34%)
No Response	11%	10%

• Global Views about Nuclear Energy after the Japan Earthquake:

	Globally	Japan
Favorable	49%	39%
Unfavorable	43%	47%
Net Favor	(6%)	(-7%)
No Response	8%	14%

### **3- Views on Resilience of Japanese Economy:**

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Optimists	(those who believe Japan will rebound to pre-Earthquake Level or even higher	48%
Pessimists	(those who believe Japan may not be able to restore to pre-Earthquake level)	38%
	(the balance 13% were unable to give a specific answer)	

Findings from a Global Snap Poll in 47 countries by WIN-Gallup International (March 21-April 10, 2011)

Summary Table # 1

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# IMPACT OF JAPAN EARTHQUAKE ON VIEWS ABOUT NUCLEAR ENERGY

	Be	fore Japa	n Earthqua	ake	After Japan Earthquake			
Global Average	57	32	25	11	49	43	6	8
		E	Before				After	
	Favor- able (1)	Unfavor- able (2)	Net Favor (1-2) = 3	NR	Favor- able (1)	Unfavor- able (2)	Net Favor (1-2) = 3	NR
Countries in Alphabetical Order								
Austria	13	87	-74	0	9	90	-81	1
Azerbaijan	17	79	-61	4	20	76	-55	4
Bangladesh	64	21	43	15	51	34	18	15
Belgium	43	46	-3	11	34	57	-23	9
Bosnia and Herzegovina	20	68	-48	11	17	75	-58	8
Brazil	34	49	-14	17	32	54	-22	14
Bulgaria	68	16	52	16	62	23	39	16
Cameroon	48	42	6	9	44	46	-2	10
Canada	51	43	8	5	43	50	-7	7
China	83	16	67	0	70	30	40	0
Colombia	24	69	-45	7	23	73	-50	4
Czech Republic	63	31	32	7	61	34	27	5
Egypt	65	22	43	13	52	37	15	10
Fiji	28	68	-40	4	29	68	-38	3
Finland	58	38	20	4	52	44	8	4
France	66	33	34	1	58	41	16	1
Georgia	25	66	-42	9	16	80	-64	4
Germany	34	64	-30	2	26	72	-46	1
Greece	12	86	-74	2	10	89	-80	1
Hong Kong	48	41	7	12	40	48	-8	12
Iceland	38	60	-22	2	32	67	-35	1
India	58	17	41	25	49	35	13	16
Iraq	62	24	38	13	49	37	12	14
Ireland	34	61	-27	5	30	67	-37	4
Italy	28	71	-43	2	24	75	-51	1
Japan	62	28	34	10	39	47	-7	14
Kenya	32	58	-26	10	21	70	-48	9
Korea, South	65	10	54	25	64	24	41	12
Latvia	54	36	18	9	53	42	11	6
Macedonia	21	67	-46	11	19	71	-52	10
Morocco	16	82	-66	2	35	61	-27	4
Netherlands	51	43	8	6	44	50	-7	6

Nigeria	65	33	32	3	63	35	28	2
Pakistan	55	24	31	20	53	27	26	20
Palestinian territories (West Bank and Gaza)	39	56	-17	5	30	67	-38	3
Poland	36	41	-5	22	30	50	-19	20
Romania	51	42	10	7	41	53	-12	6
Russia	63	32	31	4	52	27	25	21
Saudi Arabia	52	39	13	9	43	48	-6	9
Serbia	21	68	-47	11	17	75	-58	8
South Africa	45	40	6	15	49	45	4	6
Spain	39	42	-4	19	41	44	-4	15
Switzerland	40	56	-16	4	34	. 62	-28	4
Tunisia	44	29	15	26	39	41	-3	20
Turkey	45	51	-6	5	41	57	-16	3
United States	53	37	16	10	47	44	3	9
Vietnam	62	26	35	12	57	34	23	10

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Findings from a Global Snap Poll in 47 countries by WIN-Gallup International (March 21-April 10, 2011)

Source: WIN-Gallup International: Global Snap Poll in 47 countries (March 21-April 10, 2011)

Note on Weighting: Global Average is weighted according to Weighting Scheme explained in the Methods Chapter

Other Notes: This Question was not asked in Colombia, Fiji, Germany and Ireland

Findings from a Global Snap Poll in 47 countries by WIN-Gallup International (March 21-April 10, 2011)

Summary Table # 2

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## **GLOBAL VIEWS ON RESILIENCE OF JAPAN:** Will Japan Rebound?

	Pessimist	Opt	imist	Total	NR
Global Average	38	30	18	48	13
	Pessimist		Optimist		
Countries in Alphabetical Order	Pessimist	Will Restore	Will Exceed	Total	NR
Austria	50	37	12	48	1
Azerbaijan	36	40	14	54	10
Bangladesh	68	21	10	31	1
Belgium	29	46	16	62	10
Bosnia and Herzegovina	38	46	7	53	8
Brazil	31	49	13	62	7
Bulgaria	30	42	15	57	14
Cameroon	45	28	22	50	6
Canada	36	33	19	53	11
China	67	21	12	32	0
Colombia	0	0	0	0	100
Czech Republic	21	55	19	74	5
Egypt	22	55	15	70	8
Fiji	0	0	0	0	100
Finland	12	75	11	86	2
France	0	0	0	0	100
Georgia	22	56	15	71	7
Germany	0	0	0	0	100
Greece	25	55	13	68	6
Hong Kong	65	14	17	31	4
Iceland	24	69	5	74	2
India	29	31	27	58	13
Iraq	30	35	14	49	21
Ireland	0	0	0	0	100
Italy	38	48	13	61	1
Japan	55	11	24	35	10
Kenya	71	14	8	22	8
Korea, South	47	35	11	46	7
Latvia	20	61	16	77	3
Macedonia	24	53	14	68	9
Morocco	43	46	9	56	1
Netherlands	20	60	16	77	3
Nigeria	48	19	28	47	5
Pakistan	23	50	10	60	17
Palestinian territories (West Bank and Gaza)	30	41	21	62	8
Poland	28	40	11	51	21

Findings from a Global Snap Poll in 47 countries by WIN-Gallup International (March 21-April 10, 2011)

Romania	27	56	15	71	2
Russia	20	63	13	76	4
Saudi Arabia	28	42	26	69	4
Serbia	36	44	9	53	11
South Africa	42	31	16	47	10
Spain	29	45	16	61	10
Switzerland	38	41	13	54	8
Tunisia	42	30	12	42	17
Turkey	31	54	13	67	2
United States	42	27	18	44	14
Vietnam	30	59	8	66	3

Source: WIN-Gallup International: Global Snap Poll in 47 countries (March 21-April 10, 2011)

Note on Weighting: Global Average is weighted according to Weighting Scheme explained in the Methods Chapter

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Other Notes: 1- This question was not asked in Fiji, France, Ireland, Japan, Italy, Saudi Arabia and Tunisia 2- For countries which do not have Nuclear Power, the Question was modified to read "in a

nearly country, where such facilities exist. In Kenya and Nigeria it was reworded as: Suppose your country had nuclear facilities!

Findings from a Global Snap Poll in 47 countries by WIN-Gallup International (March 21-April 10, 2011)

#### **Methods Statement & Country Specific Contact Details**

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Global Snap Poll on Earthquake in Japan and its Impact on Views about Nuclear Energy

	Country	Contact	E-mail	Company	Mode	Sample Type	Data weighted	Size	Fieldwork Dates
1.	Austria	Ingrid LUSK	i.lusk@gallup.at	GALLUP Austria	Telephone	National	Yes	500	28. – 31. March 2011
2.	Azerbaijan	Ashrai Hajiyev	r.az	SIAR Research and Consulting Group	Other	Urban	No	522	March 30 – April 3'2011
3.	Bangladesh	Rahid Ahmed	rahid@orquest- bangladesh.com	ORG Quest Research Ltd.	Face to face	Urban	No	920	
4.	Belgium	William Sterckmans	wsterckmans@ded icated.be	Dedicated Research		Urban		500	
5.	Herzegovin	Hadzia//dic-	AIDA.HADZIAVDIC @MIB.BA	MARECO INDEX BOSNIA	Telephone	National	No	500	21 – 30 March 2011
6.	Brazil	Laure Castelnau	laure.castelnau@ib ope.com	IBOPE Inteligência	Face to face	National	No	1001	March 20 to 23 <sup>rd</sup>
7.	Bulgaria	Mila Grigorova	m.grigorova@gallu p-bbss.com	BBSS Gallup International	Face to face	National	Yes	996	31.03 – 07.04
8.	Cameroon		pyaptie@rms- africa.com	TNS RMS	Face to face	Other	Yes	501	From March 24 <sup>th</sup> to 27 2011
9.	Canada		swill@legermarketi ng.com	Leger Marketing	Other	Other	Yes	1058	March 25 - 30, 2011
10.	China		zhouxin@comrc.co m.cn	CRC-Research Center	Other	Other	No	501	March 22 <sup>nd</sup> 2011~March 31 <sup>st</sup> 2011
11.	Colombia	Cristina Querubin	cquerubin@cnccol. com	Centro Nacional De Consultoria		Urban	No	500	
12.	Czech Republic	Jan Trojacek	trojacek@mareco.c z	Mareco s.r.o.	Face to face	National	Yes	500	24 <sup>th</sup> - 30 <sup>th</sup> March, 2011
13.	Egypt		laila.guindy@rada- rrpr.com.	RADA Research & PR Co.	Face to face	Urban	Yes	200	20-31 March 2011
14.	Fiji Islands	Name:Tim Wilson	tim@tebbuttresearc h.com	Tebbutt Research	Face to face	Other	Yes	555	26-Mar-11
15.	Finland		jari.pajunen@talous tutkimus.fi	Taloustutkimus Oy	Telephone	National	Yes	503	23-24.3.2011
16.	France	Céline Bracq	celine.bracq@bva.fr	BVA	Other	National	Yes	1 192	23-24 March
17.	Germany		s-emma.com	TNS Emnid	Telephone	National	Yes	501	29-Mar-11
18.	Greece	Rodopoulos Theodoros	um.gr	CENTRUM RESEARCH S.A.	Telephone	National	No	500	24/3/2011- 30/3/2011
19.	Georgia		njanashvili@gorbi.c om	GORBI	Telephone	Urban	No	500	30.03 – 3.04
20.	Hong Kong	Christy Szeto	christy.szeto@cons umersearch- group.com	Consumer Search HK Ltd	Telephone	Urban	No	300	24 -31 March 2011
21.	Iceland		vilborg.hardardottir @capacent.is	Capacent Gallup	Other	National	Yes	819	March 23 <sup>rd</sup> to 30 <sup>th</sup>
22.	India	Deshmukh	oter com	CVoter News Services Pvt. Ltd.	Telephone	National	Yes	1084	25 <sup>th</sup> March
23.	Iraq	Dagnei	Munqith_daghir@iia css.org		Face to face	National	Yes	600	23-3-2011 27- 3-2011
24.	Ireland	Sinead	sinead.mooney@re dcresearch.ie	RED C Research	Telephone	National	Yes	1001	4 <sup>th</sup> – 6 <sup>th</sup> April 2011
25.	Italy		paolo.colombo@do xa.it	Doxa S.p.A	Telephone	National	Yes	1000	From 24 <sup>th</sup> March to 27 <sup>th</sup> March 2011
26.	Japan	Hisako Kumada	kumada@nrc.co.jp	Nippon Research Center	Other	Other	Yes	1000	April 5 <sup>th</sup> to 8 <sup>th</sup>
27.	Kenya	Margit Cleveland	margit.cleveland@i nfiniteinsight.co.ke	Infinite Insight (Kenya)	Face to face	Other	No	501	22 – 24 March 2011
28.	Latvia			Romir	Telephone	National	Yes	503	March 23 – March 25, 2011
29.	Macedonia	Ivana	office@brime.com	BRIMA	Telephone	National	Yes	500	24-31.03.2011
30.	Morocco	Christian Batte	bjconsult@menara. ma	BJ Group		Urban	No	500	

Findings from a Global Snap Poll in 47 countries by WIN-Gallup International (March 21-April 10, 2011)

31.	Netherlands	lmre Van Rooijen	i.van.rooijen@mark etresponse.nl	MarketResponse	Telephone	National	Yes	501	21 April – 26 April
32.	Nigeria	Cleveland	ntiniteinsiant co ke	Infinite Insight (Nigeria)	Face to face	Other	No	562	24 – 25 March 2011
33.	Pakistan		fatima.idrees@gallu pcom.pk		Face to face	National	Yes	2716	20 <sup>th</sup> Match – 26 <sup>th</sup> March
34.	Poland	Grzegorz Dąbrowski	grzegorz.dabrowski @mareco.pl	MARECO Polska	Face to face	Urban	No	531	March 28 <sup>th</sup> -31 <sup>st</sup> , 2011
35.	Dalactina	Nukali	dr.kukali@pcpo.org	Palestinian Center for Public Opinion	Face to face	National	No	816	March 24 – April 4 / 2011
36.	Romania		marius.bobi@csop.r o			National	No	500	
37.	Russia	inalaiya	lvanisheva.N@romi r.ru	Romir	Other	Urban	Yes	1500	25 <sup>th</sup> -28 <sup>th</sup> of March
38.				Pan Arab Research Center (PARC)	Telephone	Other	No	527	April 4 <sup>th</sup> , 2011 – April 9 <sup>th</sup> , 2011
39.	Serbia		milana.aleksic@tns mediumgallup.co.rs	TNS Medium Gallup, Serbia	Face to face	National	Yes	1125	24-29.03.2011
40.	S. Korea	Hyunjeong Jung	hjujung@gallup.co. kr	Gallup Korea	Telephone	National	Yes	1,031	March 23 (1 day)
41.	South Africa	Diana Nyarirangwe	diana@topliners.co .za	Topline Research Solutions (TRS)		Urban	Yes	500	
42.	Spain	Luciano Miguel	stitutodvm es	Instituto DYM	Telephone	National	Yes	514	March 22 <sup>nd</sup> -24 <sup>th</sup>
43.	Switzerland	Barbara Schumacher	barbara.schumache r@isopublic.ch	ISOPUBLIC AG	Telephone	Urban	Yes	500	30th of March to 3rd of April 2011
44.	Turkey		s.sonmezer@bare m.com.tr	BAREM RESEARCH	Telephone	National	Yes	1021	23 <sup>rd</sup> of March- 5 <sup>th</sup> of April
45.	Tunisia	Nabil BELAAM		EMRHOD INTERNATIONAL	Face to face	Other	No	1009	From 28/03/2011 to 7/04/2011
46.	USA		swill@legermarketi ng.com	TRIG	Other	National	Yes	500	March 25 - 30, 2011
47.		Phung Thi Nam Trang		Indochina Research Vietnam	Face to face	National	Yes	500	25 – 31 March, 2010

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