Iraq
Findings From the World Poll
Mohamed Younis, Senior Analyst and Senior Practice Consultant, Gallup
Gallup World Poll Methodology

- Five telephone surveys since 2013
- Last survey: April 2016
- Nationally representative of all adults 15 years and older
- Sample size: Approximately 1,000 per survey
- Mode: Telephone (landline+mobile)
- MoE ± 3.0 percentage points
### Gallup World Poll in Iraq

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>51%</td>
</tr>
<tr>
<td>Female</td>
<td>49%</td>
</tr>
<tr>
<td>15-24</td>
<td>25%</td>
</tr>
<tr>
<td>25-34</td>
<td>36%</td>
</tr>
<tr>
<td>35+</td>
<td>39%</td>
</tr>
<tr>
<td>Employed full time for an employer</td>
<td>12%</td>
</tr>
<tr>
<td>Unemployed</td>
<td>15%</td>
</tr>
<tr>
<td>Primary education or less</td>
<td>65%</td>
</tr>
<tr>
<td>Intermediate or secondary education</td>
<td>27%</td>
</tr>
<tr>
<td>Higher education</td>
<td>7%</td>
</tr>
<tr>
<td>Not enough money for Food</td>
<td>51%</td>
</tr>
<tr>
<td>Lacking enough money for shelter</td>
<td>50%</td>
</tr>
<tr>
<td>Finding it difficult on their present income</td>
<td>70%</td>
</tr>
<tr>
<td>Living in Southern Iraq</td>
<td>36%</td>
</tr>
<tr>
<td>Living In Baghdad</td>
<td>25%</td>
</tr>
<tr>
<td>Living in Iraqi Kurdistan areas</td>
<td>13%</td>
</tr>
<tr>
<td>Living In disputed areas</td>
<td>18%</td>
</tr>
<tr>
<td>Living in areas with heavy ISIL presence</td>
<td>8%</td>
</tr>
</tbody>
</table>

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Do the media in this country have a lot of FREEDOM, or NOT?

%Yes
Developments in Iraq at Time of Survey

- Noticeable escalation in protest movements demanding government reform
- Sadrist sit-ins and protests continue in Baghdad
- Iraqi Forces fully clear Hit District (west of Ramadi)
- Security forces launch clearing operations in Diyala
- April 12th CoR session descends into chaos; Jabouri leadership challenged
- Oil remains around $40-44/barrel exacerbating economic woes
- Beirut meeting between Sadr, Maliki and Sistani representatives under hospices of Hizbullah
### Measuring Life Evaluation

Gallup tracks the prevalence of three categories based on respondents’ present and future life ratings on a 0 to 10 scale:

<table>
<thead>
<tr>
<th>Thriving</th>
<th>Struggling</th>
<th>Suffering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respondents have positive views of their present life situation (7+) AND a positive view of where their lives will be in five years (8+).</td>
<td>Respondents have moderate to negative views of their present life situation OR moderate to negative views of where their lives will be in five years.</td>
<td>Respondents have negative views of their current life situation (4 or below) AND negative views of where their lives will be in five years (4 or below).</td>
</tr>
</tbody>
</table>
Economic Conditions

How would you rate economic conditions in this country today: as excellent, good, only fair or poor?

<table>
<thead>
<tr>
<th>Year</th>
<th>Excellent</th>
<th>Good</th>
<th>Only Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>September '13</td>
<td>6%</td>
<td>4%</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>May '14</td>
<td>2%</td>
<td>2%</td>
<td>26%</td>
<td>49%</td>
</tr>
<tr>
<td>November '14</td>
<td>2%</td>
<td>16%</td>
<td>28%</td>
<td>54%</td>
</tr>
<tr>
<td>October '15</td>
<td>2%</td>
<td>10%</td>
<td>22%</td>
<td>63%</td>
</tr>
<tr>
<td>April '16</td>
<td>2%</td>
<td>7%</td>
<td>22%</td>
<td>67%</td>
</tr>
</tbody>
</table>

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Economic Conditions

% Poor

<table>
<thead>
<tr>
<th>Region</th>
<th>September '13</th>
<th>May '14</th>
<th>November '14</th>
<th>October '15</th>
<th>April '16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy ISIL Presence</td>
<td>46%</td>
<td>50%</td>
<td>60%</td>
<td>59%</td>
<td>60%</td>
</tr>
<tr>
<td>Disputed Areas</td>
<td>50%</td>
<td>47%</td>
<td>63%</td>
<td>55%</td>
<td>63%</td>
</tr>
<tr>
<td>Baghdad</td>
<td>40%</td>
<td>49%</td>
<td>49%</td>
<td>57%</td>
<td>65%</td>
</tr>
<tr>
<td>Iraqi Kurdistan</td>
<td>21%</td>
<td>50%</td>
<td>46%</td>
<td>50%</td>
<td>71%</td>
</tr>
<tr>
<td>Southern Iraq</td>
<td>38%</td>
<td>46%</td>
<td>46%</td>
<td>50%</td>
<td>61%</td>
</tr>
</tbody>
</table>
Confidence in Military

In Iraq, do you have confidence in each of the following, or not? How about the military?

% Yes

<table>
<thead>
<tr>
<th></th>
<th>September '13</th>
<th>November '14</th>
<th>October '15</th>
<th>April '16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy ISIL Presence</td>
<td>57%</td>
<td>53%</td>
<td>53%</td>
<td>60%</td>
</tr>
<tr>
<td>Disputed Areas</td>
<td>43%</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>Baghdad</td>
<td>53%</td>
<td>64%</td>
<td>70%</td>
<td>75%</td>
</tr>
<tr>
<td>Iraqi Kurdistan</td>
<td>53%</td>
<td>36%</td>
<td>44%</td>
<td>36%</td>
</tr>
<tr>
<td>Southern Iraq</td>
<td>69%</td>
<td>78%</td>
<td>82%</td>
<td>82%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td>67%</td>
</tr>
</tbody>
</table>

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Confidence in National Government

In Iraq, do you have confidence in each of the following, or not? How about the national government?

% Yes

- **Heavy ISIL Presence**:
  - September '13: 54%
  - May '14: 52%
  - November '14: 55%
  - October '15: 46%
  - April '16: 45%

- **Disputed Areas**: 26%, 37%, 36%, 43%, 44%

- **Baghdad**: 45%, 44%, 35%, 40%, 43%

- **Iraqi Kurdistan**: 55%, 55%, 55%, 52%, 46%

- **Southern Iraq**: 55%, 53%, 52%, 46%, 50%

- **Total**: 60%, 52%, 55%, 46%, 44%
Approval of Iraqi Prime Minister

Do you **APPROVE** or **DISAPPROVE** of the way Haider Al Abadi is handling his job as prime minister?

**November 2014**
- Iraqi Kurdistan, 53%
- Disputed areas, 75%
- Heavy ISIL presence, 69%
- Baghdad, 78%
- Southern Iraq, 76%

**April 2016**
- Iraqi Kurdistan, 15%
- Disputed areas, 40%
- Heavy ISIL presence, 60%
- Baghdad, 33%
- Southern Iraq, 32%
Key Takeaways

- **Half of Iraqi households** have had times in past 12 months where they lacked **sufficient food** and **shelter** (First time that a majority of Iraqis have expressed food insecurity)

- Assessments of the **job market** and **national economy** are the worst Gallup has collected in the country since 2009

- **Approval of PM Abbadi** is currently below PM Nouri Al Maliki before he left office

- **Most Iraqis** (67%) lack confidence in the **honesty of elections**

- Wellbeing and perceptions of national institutions **vary dramatically across regions**
Media Use in Iraq and Iraqi Kurdistan Region

Diana Turecek, Director of Audience Research, Middle East Broadcasting Networks
Research Methodology

• Computer Assisted Telephone Interviews (CATI)
  – Both landlines and mobile

• Fieldwork December 21, 2015 — January 22, 2016

• Sample size: 2,001

• Representative of all adults living in Iraq and Iraqi Kurdistan Region (ages 15 and older in 19 governorates)
  – 21 million adults

• 2015 focus groups with Iraqi TV viewers in Baghdad
Internet Use is Increasing Rapidly...

Percent who used Internet in past week

2012

18% 27%

2014-15

40% 50%

2015-16

58% 71%

All Iraqis

15-24 year olds
...And Use is High Across Provinces

- 50-70% of inhabitants in each province used internet in past week for news.
Use Increasing Among Traditional Low-use Populations

Past week Internet use among selected populations

- **Women**
  - 2014-2015: 30%
  - 2015-2016: 52%

- **Primary Ed or Less**
  - 2014-2015: 20%
  - 2015-2016: 39%

- **Rural**
  - 2014-2015: 28%
  - 2015-2016: 45%
Iraqis Using Internet Heavily for Several Purposes

Percent of past week Internet users nationally and in selected provinces who did each activity online in the past week

- **Watched TV or video**
  - All Iraqis (n=1164): 69%
  - Baghdad (n=336): 75%
  - Anbar (n=611): 78%

- **Used radio or audio**
  - All Iraqis (n=1164): 64%
  - Baghdad (n=336): 65%
  - Anbar (n=611): 62%

- **Used computer or mobile app**
  - All Iraqis (n=1164): 37%
  - Baghdad (n=336): 45%
  - Anbar (n=611): 48%
Facebook and YouTube Popular Across Provinces

- **69-91% of past week Internet users** in at least 8 of Iraq’s 19 provinces used Facebook in past week

- **49-72% of past week Internet users** in at least 8 of Iraq’s 19 provinces used You Tube in past week
As More Use the Internet, More Trust It

2015/2016
Trust news on platform strongly or somewhat

- All respondents
- 15-24 year olds

TV
- 81%
- 82%

Internet
- 50%
- 60%

versus

2014/2015
Trust news on platform strongly or somewhat

- All respondents
- 15-24 year olds

Internet
- 41%
- 51%
Greater Internet Access

Percent of Iraqis With Home Internet Access

- Access higher in all provinces except for Muthanna, Qadisiya, & Karbala in Southern Iraq
- Use has still increased in Qadasiya and Muthanna
...Better Cell Phone Coverage Means Internet Access is More Convenient

- Iraqis have 3G as of 2015

Percent of Iraqis who used mobile to access Internet in past week

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014/15</td>
<td>34%</td>
</tr>
<tr>
<td>2015/16</td>
<td>48%</td>
</tr>
</tbody>
</table>

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Political Changes May Play a Role

- Provinces where ISIS has lost territory (Anbar and Sala al Din) have greatest increases in Internet usage.

*ISIS executed six people in Mosul in Jan 2016 for using the Internet on cell phones; ISIS requires Internet users to register with names and addresses*
Television Remains the Most Popular Media Source, Even Among Youth

Past week use for news

<table>
<thead>
<tr>
<th></th>
<th>All Iraqis</th>
<th>15-24 year olds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td>89%</td>
<td>87%</td>
</tr>
<tr>
<td>Internet</td>
<td>57%</td>
<td>67%</td>
</tr>
<tr>
<td>Radio</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Print</td>
<td>23%</td>
<td>26%</td>
</tr>
</tbody>
</table>

I am watching more TV not just because of current events but because citizens have been forced to sit at home fearful of the street and the unknown. (Iraqi male in Baghdad, 2015 focus groups)
Internet Not Replacing TV

- 89% of past-week Internet users in Iraq also used TV in the past week for news
- 88% of 15-24 year old past-week Internet users used TV in the past week for news.

*ISIS launched satellite TV station in Mosul, BEIN HD4 in Jan 2016*
Past Week Internet Users Still Getting News in Traditional Ways

Do you watch TV primarily via a TV set or primarily with another electronic device? (n=1164)

- A TV Set: 94%
- Another electronic device: 4%

Would you say you exchange news with friends and family... (n=1164)

- Primarily through face to face conversations: 70%
- Through electronic means such as text, email, Skype: 22%

“At the current time, televisions are very developed and big and they work well and watching on a TV is wonderful and much better than (a phone or computer).” – Male in Baghdad focus groups
Internet Use and Access Could Change

- Many Iraqis using satellite Internet; government trying to cut access in ISIS-controlled areas

- 2014 Iraqi government asks Internet providers to shut down Internet in 5 provinces and block access to Facebook, Twitter, and other social networks

- Cost – Government increased prices of Internet and mobile top up cards in 2015 by 20%
Key Takeaways

- Internet use is increasing rapidly, but not replacing TV
- Increases vary significantly by province
- Internet trends will change as Iraqi government and ISIS vie for control of media
Media Consumption in Iraqi Kurdistan
Bill Bell, Research Director, Voice of America
A Historical Perspective: Iraq 2003

Satellite Dish in household
% Yes

Kurds: 46%
Others: 29%

Radio and TV Use for News

% citing radio as most important news source
% citing TV as most important news source

Kurds:
- 86% citing radio
- 8% citing TV

Others:
- 21% citing radio
- 63% citing TV
2016: Household Ownership of Media Equipment

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Kurds</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>100%</td>
<td>98%</td>
</tr>
<tr>
<td>Radio</td>
<td>51%</td>
<td>31%</td>
</tr>
<tr>
<td>Internet</td>
<td>72%</td>
<td>60%</td>
</tr>
<tr>
<td>Satellite dish</td>
<td>89%</td>
<td>97%</td>
</tr>
<tr>
<td>Landline phone</td>
<td>27%</td>
<td>5%</td>
</tr>
<tr>
<td>Mobile</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

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“Yesterday” Media Usage

<table>
<thead>
<tr>
<th></th>
<th>Kurds</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>82%</td>
<td>84%</td>
</tr>
<tr>
<td>Radio</td>
<td>28%</td>
<td>18%</td>
</tr>
<tr>
<td>Internet</td>
<td>51%</td>
<td>46%</td>
</tr>
</tbody>
</table>

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Frequency of News Access

Percentage of respondents accessing news once or more than once daily

- Kurds:
  - More than once a day: 60%
  - Once a day: 25%

- Others:
  - More than once a day: 36%
  - Once a day: 28%

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A Rich Media Environment

<table>
<thead>
<tr>
<th>Channel Name</th>
<th>Channel Name</th>
<th>Channel Name</th>
<th>Channel Name</th>
<th>Channel Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>RONAḪ TV</td>
<td>KURDISTAN TV</td>
<td>KURDSAT TV</td>
<td>MED NÛÇE TV</td>
<td>KNN TV</td>
</tr>
<tr>
<td><img src="image" alt="RONAḪ TV Logo" /></td>
<td><img src="image" alt="KURDISTAN TV Logo" /></td>
<td><img src="image" alt="KURDSAT TV Logo" /></td>
<td><img src="image" alt="MED NÛÇE TV Logo" /></td>
<td><img src="image" alt="KNN TV Logo" /></td>
</tr>
<tr>
<td>NALIA TV</td>
<td>NALIA 2 TV</td>
<td>KURDMAX TV</td>
<td>RUDAW TV</td>
<td>STËRK TV</td>
</tr>
<tr>
<td><img src="image" alt="NALIA TV Logo" /></td>
<td><img src="image" alt="NALIA 2 TV Logo" /></td>
<td><img src="image" alt="KURDMAX TV Logo" /></td>
<td><img src="image" alt="RUDAW TV Logo" /></td>
<td><img src="image" alt="STËRK TV Logo" /></td>
</tr>
<tr>
<td>WAAR TV</td>
<td>SPEDA TV</td>
<td>ÇIRA TV</td>
<td>KURDISTAN24 TV</td>
<td>GEM KURD TV</td>
</tr>
<tr>
<td><img src="image" alt="WAAR TV Logo" /></td>
<td><img src="image" alt="SPEDA TV Logo" /></td>
<td><img src="image" alt="ÇIRA TV Logo" /></td>
<td><img src="image" alt="KURDISTAN24 TV Logo" /></td>
<td><img src="image" alt="GEM KURD TV Logo" /></td>
</tr>
<tr>
<td>KURDSAT NEWS TV</td>
<td>PAYAM TV</td>
<td>MED MÜZIK TV</td>
<td>VIN TV</td>
<td>KANAL4</td>
</tr>
<tr>
<td><img src="image" alt="KURDSAT NEWS TV Logo" /></td>
<td><img src="image" alt="PAYAM TV Logo" /></td>
<td><img src="image" alt="MED MÜZIK TV Logo" /></td>
<td><img src="image" alt="VIN TV Logo" /></td>
<td><img src="image" alt="KANAL4 Logo" /></td>
</tr>
</tbody>
</table>
Past Week Viewing of TV Stations

<table>
<thead>
<tr>
<th>Kurds</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rudaw</td>
<td>76%</td>
</tr>
<tr>
<td>NRT</td>
<td>70%</td>
</tr>
<tr>
<td>KTV</td>
<td>53%</td>
</tr>
<tr>
<td>Kurdsat</td>
<td>51%</td>
</tr>
<tr>
<td>Zagros TV</td>
<td>40%</td>
</tr>
<tr>
<td>Al Arabiya</td>
<td>32%</td>
</tr>
<tr>
<td>Al Jazeera</td>
<td>25%</td>
</tr>
<tr>
<td>Yegkirtu TV</td>
<td>19%</td>
</tr>
<tr>
<td>Roj TV</td>
<td>14%</td>
</tr>
<tr>
<td>BBC Arabic</td>
<td>13%</td>
</tr>
</tbody>
</table>

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Top News Sources

Percentage citing each outlet as one of their top three news sources

<table>
<thead>
<tr>
<th>Outlets</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rudaw</td>
<td>55%</td>
</tr>
<tr>
<td>NRT</td>
<td>42%</td>
</tr>
<tr>
<td>Al Arabiya</td>
<td>11%</td>
</tr>
<tr>
<td>Kurdsat</td>
<td>8%</td>
</tr>
<tr>
<td>Facebook</td>
<td>6%</td>
</tr>
<tr>
<td>Al Iraqiya</td>
<td>51%</td>
</tr>
<tr>
<td>Al Sharqiya</td>
<td>36%</td>
</tr>
<tr>
<td>Al Baghdadia</td>
<td>23%</td>
</tr>
<tr>
<td>Al Arabiya</td>
<td>20%</td>
</tr>
<tr>
<td>Facebook</td>
<td>14%</td>
</tr>
</tbody>
</table>
Interest in News About...

Percentage of each groups “very interested” in news about each country

- **Iraq**
  - Kurds: 84%
  - Others: 62%

- **Syria**
  - Kurds: 47%
  - Others: 32%

- **Palestine**
  - Kurds: 33%
  - Others: 15%

- **USA**
  - Kurds: 18%
  - Others: 8%

- **Europe**
  - Kurds: 19%
  - Others: 7%
Regional Differences Within Iraqi Kurdistan

Percentage citing NRT and Rudaw as one of top three news sources, by governorate

- **Erbil**: 40% NRT, 70% Rudaw
- **Dohuk**: 30% NRT, 77% Rudaw
- **Sulemaniyah**: 40% NRT, 68% Rudaw

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Use of Social Media for News Access

Percentage using Facebook and YouTube at least weekly to access news

<table>
<thead>
<tr>
<th>Group</th>
<th>Facebook</th>
<th>YouTube</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kurds</td>
<td>46%</td>
<td>9%</td>
</tr>
<tr>
<td>Others</td>
<td>32%</td>
<td>19%</td>
</tr>
</tbody>
</table>

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Frequency of News Sharing with Family, Friends, Relatives

- **Kurds**
  - Daily or most days: 54%
  - At least weekly: 15%

- **Others**
  - Daily or most days: 24%
  - At least weekly: 56%
For Those Who Share News, What Mode Do You Use the most?

- **Face to face**: 84% (Kurds) vs. 80% (Others)
- **Electronic means**: 9% (Kurds) vs. 15% (Others)
- **DK**: 12% (Kurds) vs. 2% (Others)

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Conclusions

- Kurds live in a different media environment and rely primarily on Kurdish language TV

- Differences in substantive interests.

- Historical differences in media access between Iraqi Kurdistan and rest of Iraq have disappeared

- Facebook and other forms of social-media based news sharing are increasingly important
Appendix

Additional media data
Iraqis Using Internet Heavily for Several Purposes

Percent of past-week Internet users nationally and in selected provinces who did each activity online in past week

- All Iraqis (n=1164)
- Baghdad (n=336)
- Anbar (n=611)

- Watched video or TV: 78%, 75%, 69%
- Listened to online radio or audio: 62%, 65%, 64%
- Sent/received video: 53%, 54%, 40%
- Downloaded or used computer or mobile app: 48%, 45%, 37%
Facebook and YouTube Popular Across Provinces

Iraq: Percentage of past-week Internet users in each province who used Facebook and YouTube in past week

<table>
<thead>
<tr>
<th>Province</th>
<th>Facebook</th>
<th>YouTube</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baghdad (n=336)</td>
<td>76%</td>
<td>70%</td>
</tr>
<tr>
<td>Basra (n=103)</td>
<td>69%</td>
<td>70%</td>
</tr>
<tr>
<td>Saladin (n=61)</td>
<td>80%</td>
<td>71%</td>
</tr>
<tr>
<td>Dhi Qar (n=67)</td>
<td>84%</td>
<td>72%</td>
</tr>
<tr>
<td>Babil (n=55)</td>
<td>91%</td>
<td>66%</td>
</tr>
<tr>
<td>Najaf (n=59)</td>
<td>83%</td>
<td>64%</td>
</tr>
<tr>
<td>Anbar (n=61)</td>
<td>77%</td>
<td>49%</td>
</tr>
<tr>
<td>Diyala (n=80)</td>
<td>83%</td>
<td>61%</td>
</tr>
</tbody>
</table>

- In Baghdad, 93% used mobile to access Facebook in past week; 31% used a computer
Changes in Internet Usage

Iraq: Percentage Point Change in Past Week Internet Reach by Province (2014/15-2015/16)

Baghdad: 21
Basra: 25
Saladin: 41
Dhi Qar: 19
Babil: 12
Najaf: 32
Qadasiya: 44
Wasit: 9
Karbali: -9
Anbar: 58
Muthanna: 15
Diya: 26
Ninewah: 28
Internet Users versus TV Users

How frequently do you hear about the following topics in the media?
At least several times a day.

- Used TV past week not internet (n=699)
- Used internet past week not TV (n=106)

- Information critical of groups such as ISIS: 36% for TV users, 26% for internet users
- Information supportive of groups such as ISIS: 20% for TV users, 12% for internet users

• Internet users not getting more ISIS propaganda than TV users
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