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GLOBAL END OF YEAR SURVEY

GLOBAL AND PAKISTAN RESULTS 2015



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WIN/Gallup International's annual global End of Year survey has revealed a world of conflicting hopes, levels of happiness and despair. In this 39th edition, 66040 people from 68 countries across the globe were asked for their views and expectations on three main indicators i.e. hope, economic optimism and happiness.

ABOUT THE END OF YEAR SURVEY (EOY)

This press release is based on the responses to three questions published in the 39th End of Year Survey (EOY), by WIN/Gallup International, the world's leading association in market research and polling. The WIN/Gallup International survey is an annual tradition initiated by and designed under the chairmanship of Dr. George Gallup in 1977. It has been conducted every year since then. This year it was carried out by the WIN/Gallup International Association in 68 countries around the world and draws on the outlook, expectations, views and beliefs of a sample of 66040 people from 68 countries across the globe. This particular press release consolidates information from three questions on hope, economic optimism and happiness.

The questions are:

Q1. In general, do you personally feel very happy, happy, neither happy nor unhappy, unhappy or very unhappy about your life?

Q2. As far as you are concerned, do you think that 2016 will be better, worse or the same than 2015?

Q3. Compared to this year, in your opinion, will next year be a year of economic prosperity, economic difficulty or remain the same for your country?

SAMPLE SIZE AND MODE OF FIELD WORK

A total of 66040 persons were interviewed globally. In each country a representative sample of around 1000 men and women was interviewed either face to face (30 countries; n=32172), via telephone (15 countries; n=11800) or online (23 countries; n=22068). The field work was conducted during September 2015 - December 2015. The margin of error for the survey is between +3-5% at 95% confidence level.

ABOUT WIN/GALLUP INTERNATIONAL

WIN/Gallup International is the leading association in market research and polling and is made up of the 76 largest independent market research and polling firms in their respective countries with combined revenue of over €550 million and covering 95% of the world's market.

For more than 60 years WIN/Gallup International Members have demonstrated their expert ability to conduct multi-country surveys on a comparable basis and deliver the highest quality. Their Members are leading national institutes with a profound local knowledge of research methods and techniques, statistical sources, customs and culture differences of its own country and carefully selected by the Association Board. With only one Member agency per country, Members work together on a daily basis to share knowledge, new research techniques and tools, as well as to provide the most appropriate solutions to international research projects and service our clients to the best of our abilities.

The accumulated expertise of the Association is formidable - they have internationally renowned experts in public opinion, Third World issues, advertising, and media research as well as in commercial fields such as IT/telecommunications, healthcare, retail, economics, corporate research and so on. Members are at the leading edge of technical and methodological developments, which have impacted on not only the research industry but also the whole commercial world.

HAPPINESS

GLOBAL RESULTS:

66% respondents claim to be happy about their lives; 10% claim to be unhappy.

PAKISTAN'S RESULTS:

64% Pakistanis claim to be happy; 4% claim to be unhappy.

PAKISTAN'S COMPARISON WITH OTHER COUNTRIES:

Average Net Happiness is higher than India and Afghanistan but lower than Bangladesh.

PAKISTAN'S COMPARISON WITH OTHER REGIONS:

Average Net Happiness is higher than average net score of Aspiring, Emerging and Prosperous regions.

HOPE

GLOBAL RESULTS:

54% are hopeful of a better year ahead; 16% are not hopeful.

PAKISTAN'S RESULTS:

Pakistan as the 10th 'Most Optimistic' country in the world

PAKISTAN'S COMPARISON WITH OTHER COUNTRIES:

Pakistan's net score is higher than Afghanistan but lower than India and Bangladesh.

PAKISTAN'S COMPARISON WITH OTHER REGIONS:

Pakistan's net score is higher than average net score of Aspiring and Prosperous countries however lower than net score of Emerging countries

ECONOMIC OPTIMISM

GLOBAL RESULTS:

45% of the world is optimistic about economic outlook for 2016; 22% is pessimistic.

PAKISTAN'S RESULTS:

58% Pakistanis are optimistic about Pakistan's economic prosperity in 2016; 8% are pessimistic.

PAKISTAN'S COMPARISON WITH OTHER COUNTRIES:

Pakistan's net optimism is higher than India and Afghanistan but lower than Bangladesh.

PAKISTAN'S COMPARISON WITH OTHER REGIONS:

Pakistan's net optimism is higher than Aspiring, Emerging and Prosperous regions.

KEY FINDINGS AND SYNOPSIS OF END OF YEAR SURVEY PAKISTAN

GLOBAL RESULTS

66% RESPONDENTS CLAIM TO BE HAPPY ABOUT THEIR LIVES; 10% CLAIM TO BE UNHAPPY

In order to gauge levels of happiness, respondents all across the world were asked the following question, "In general, do you personally feel very happy, neither happy nor unhappy, unhappy or very unhappy about your life?" 66% of the world said that they feel happy about their lives which is lower than those who claimed to be happy in 2014 (70%). 23% said they feel neither happy nor unhappy and 10% said they feel unhappy. 1% did not respond. Net happiness (happy minus unhappy) globally is 56% and out of the 68 countries, Colombia is the happiest in the world (at 85% net happiness) followed by Fiji, Saudi Arabia, Azerbaijan and Vietnam while Iraq is the least happy (-12% net happiness).

FIGURE 1

GLOBAL RESULT ON HAPPINESS

Question: In general, do you personally feel very happy, happy, neither happy nor unhappy, unhappy or very unhappy about your life?



Source: End Of Year Survey 2015; 66040 men and women across 68 countries surveyed

PAKISTAN'S RESULTS

64% PAKISTANIS CLAIM TO BE HAPPY; 4% CLAIM TO BE UNHAPPY

Pakistan's results have revealed an optimistic picture with net happiness of 60% which is higher than the global net happiness at 56%. 64% Pakistanis said that they are happy, 29% said that they are neutral (i.e. neither happy nor unhappy) and 4% said they are unhappy. 2% did not respond. A direct comparison with the global results shows that Pakistan's figure for happiness (64%) is lower than the global figure (66%) however a greater percentage of Pakistanis claim to be neutral (29%) than those globally (23%). Furthermore, the figure of unhappiness is also lower in Pakistan (4%) than globally (10%).

FIGURE 2

PAKISTAN RESULT ON HAPPINESS

Question: In general, do you personally feel very happy, happy, neither happy nor unhappy, unhappy or very unhappy about your life?



Source: End Of Year Survey 2015; 66040 men and women across 68 countries surveyed

1.HAPPINESS

HOPE IN PAKISTAN: DECLINING OR INCREASING?

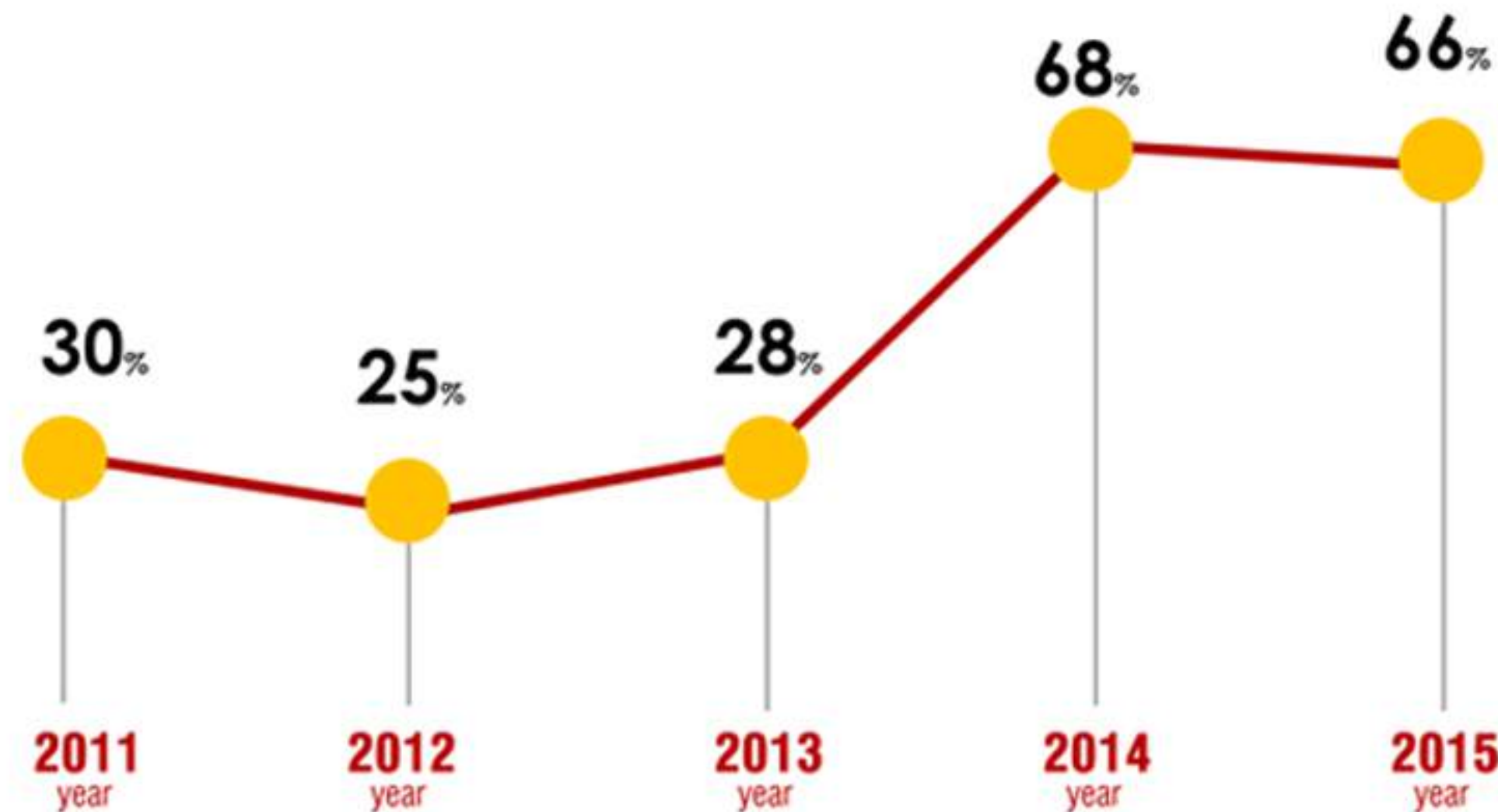
A comparison of Pakistan's results with the previous year show a minor decline on the happiness index. In 2014, 68% respondents had claimed to be happy with their lives which is 2% higher than the present figure (66% in 2015). Those who claimed to be neutral (i.e. neither happy nor unhappy) were more in 2015 (29%) than in 2014 (25%) whereas those who claimed to be unhappy this year (4%) were less than those who said the same in 2014 (6%). Net happiness in the year 2014 was thus higher at 62% than in 2015 at 60%.

The happiness indicator was also tested in 2011, 2012 and 2013. A comparison of their results with Pakistan's current results shows a marked increase in happiness from the year 2013 onwards. Net happiness for instance decreased from 30% in 2011 to 25% in 2012 after which it slightly rose to 28% in 2013. By the year 2014 however, this figure had taken a huge leap with net happiness at 62%.

FIGURE 3

NET HAPPINESS BETWEEN 2011 AND 2015

Question: In general, do you personally feel very happy, happy, neither happy nor unhappy, unhappy or very unhappy about your life?



Net Happiness

Source: End Of Year Survey 2015; 66040 men and women across 68 countries surveyed
Note: Net Happiness here is defined as the net score of Happy over Unhappy

PAKISTAN'S COMPARISON WITH OTHER COUNTRIES:

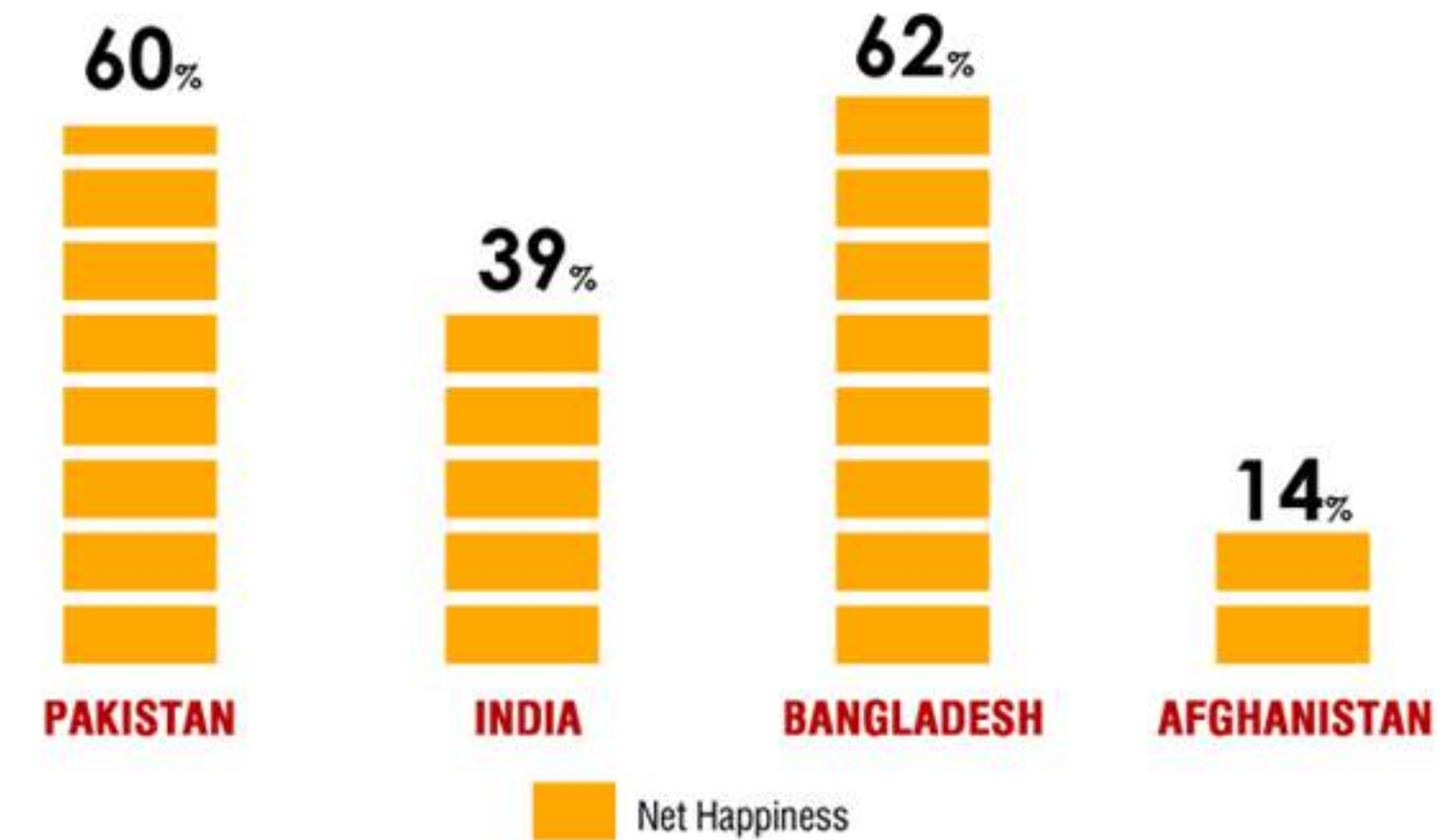
AVERAGE NET HAPPINESS HIGHER THAN INDIA AND AFGHANISTAN, LOWER THAN BANGLADESH.

In order to enable a holistic analysis, Pakistan's results are also compared to average results in West and South Asian region (India, Bangladesh, Afghanistan and Israel). Based on net happiness, Pakistan has fared much better at 60% than the average net happiness of South and West Asian countries at 42%. With regards to some specific countries, Pakistan has higher level of happiness than India, which has a net happiness figure of 39%, and much higher than Afghanistan with net happiness of 14%. However the figure is lower than Bangladesh which has net happiness of 61% in 2015 (compare with 60% in Pakistan)

FIGURE 4

PAKISTAN'S COMPARISON WITH OTHER COUNTRIES

Question: In general, do you personally feel very happy, happy, neither happy nor unhappy, unhappy or very unhappy about your life?



Source: End Of Year Survey 2015; 66040 men and women across 68 countries surveyed
Note: Net Happiness here is defined as the net score of Happy over Unhappy

PAKISTAN'S COMPARISON WITH OTHER REGIONS:

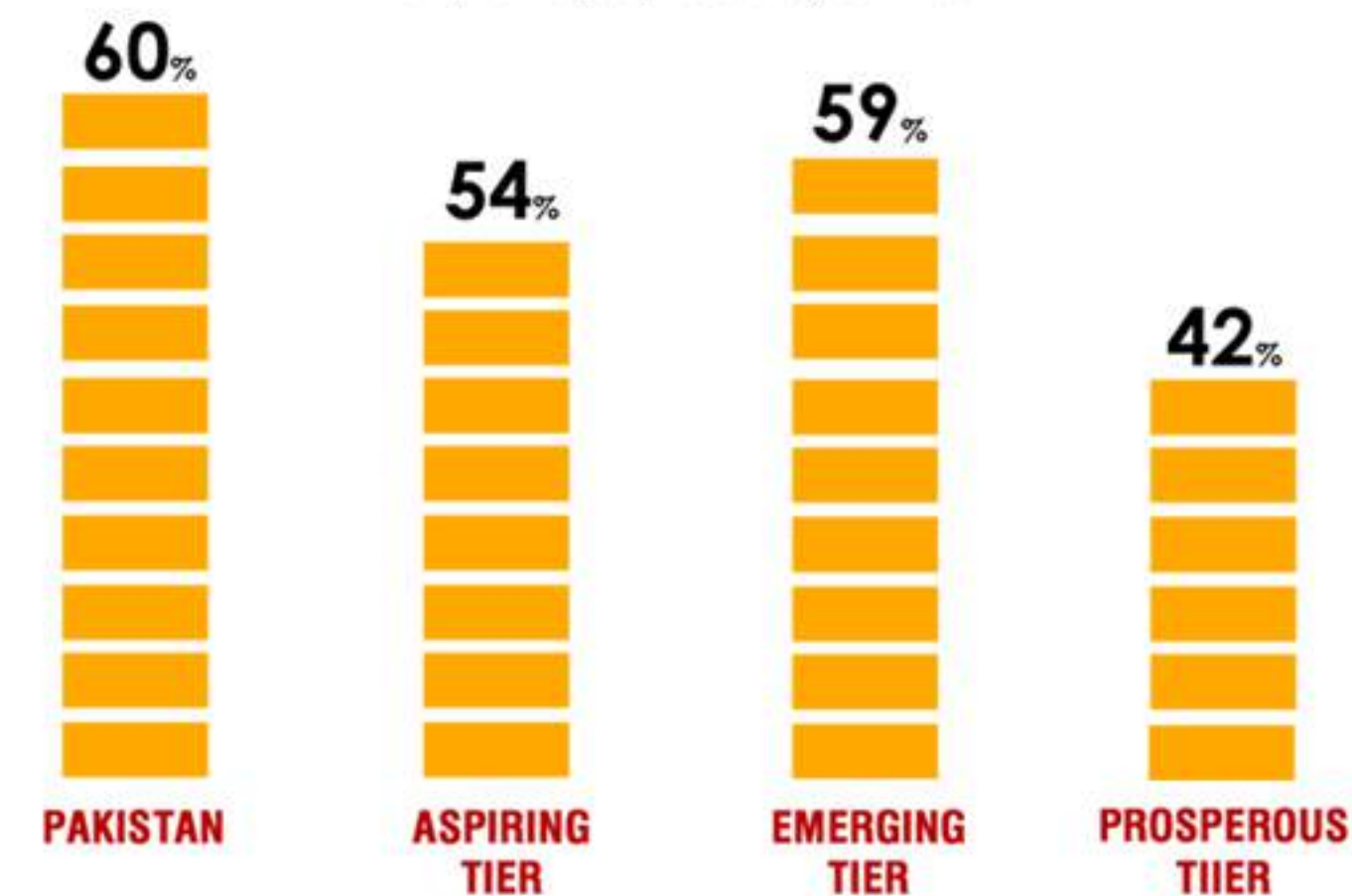
AVERAGE NET HAPPINESS IS HIGHER THAN AVERAGE NET SCORE OF ASPIRING, EMERGING AND PROSPEROUS REGIONS

For the purpose of this press release, a further global classification was done to group countries on the basis of their socio-economic status. These categories include 'Prosperous' (including G7 countries) 'Emerging' (including G20 other than G7.) and 'Aspiring' (including all others). Within that, the 'Emerging' category has the highest net happiness figure at 59% followed by 'Aspiring' tier at 54% and 'Prosperous' tier at the lowest rung of the ladder at 42%. Pakistan's comparison with the 'aspiring' category thus shows that its net happiness level is 6% greater than the average net happiness of 'aspiring' tier (at 54%).

FIGURE 5

PAKISTAN'S COMPARISON WITH OTHER REGIONS

Question: In general, do you personally feel very happy, happy, neither happy nor unhappy, unhappy or very unhappy about your life?



Source: End Of Year Survey 2015; 66040 men and women across 68 countries surveyed
Note: Net Happiness here is defined as the net score of Happy over Unhappy



GLOBAL RESULTS

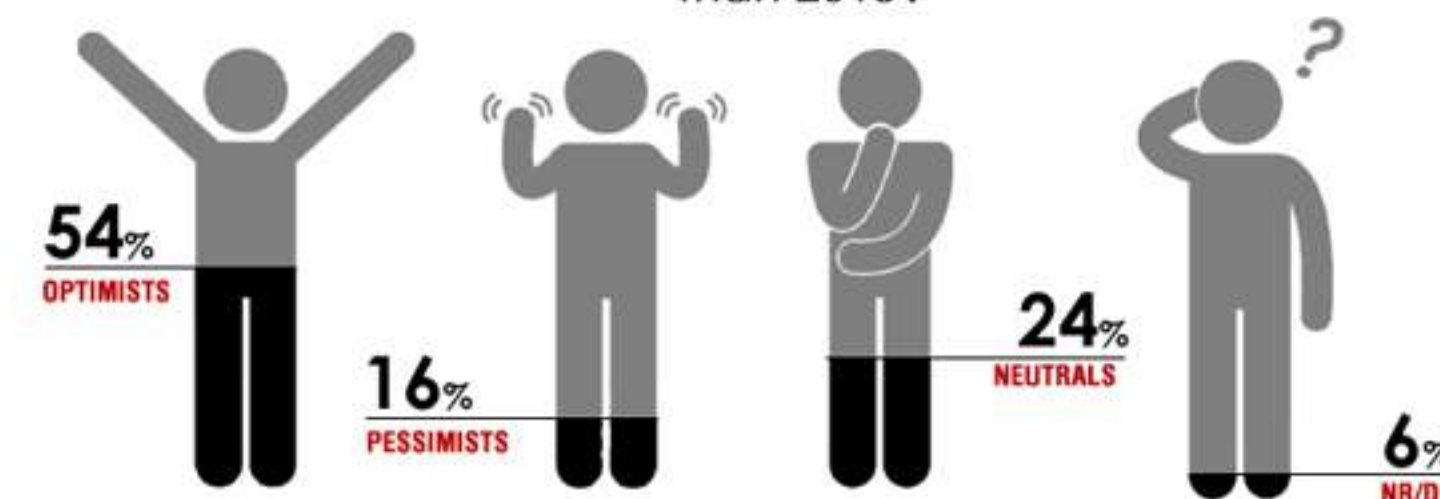
54% ARE HOPEFUL OF A BETTER YEAR AHEAD; 16% ARE NOT HOPEFUL

Respondents across the world were also asked questions to gauge their level of hopefulness for the following year. They were asked "As far as you are concerned, do you think that 2016 will be better, worse or the same than 2015?" According to the global results, the optimists led pessimists by 38%. 54% believed that 2016 would be better than 2015 whereas 16% said that 2016 would be worse. 24% are neutral in this regard i.e. they believe that 2016 would be neither good nor bad. 6% did not respond. Out of the 68 countries, Bangladesh was most hopeful (net hope at 74%) followed by China at 70% and Nigeria at 68%. The bottom most tier included Palestinian territories at -27%, Greece at -28%, Iraq at -35% and Italy at -37%.

FIGURE 6

GLOBAL RESULT ON HOPE

Question: As far as you are concerned, do you think that 2016 will be better, worse or the same than 2015?



Source: End Of Year Survey 2015; 66040 men and women across 68 countries surveyed

PAKISTAN'S RESULTS

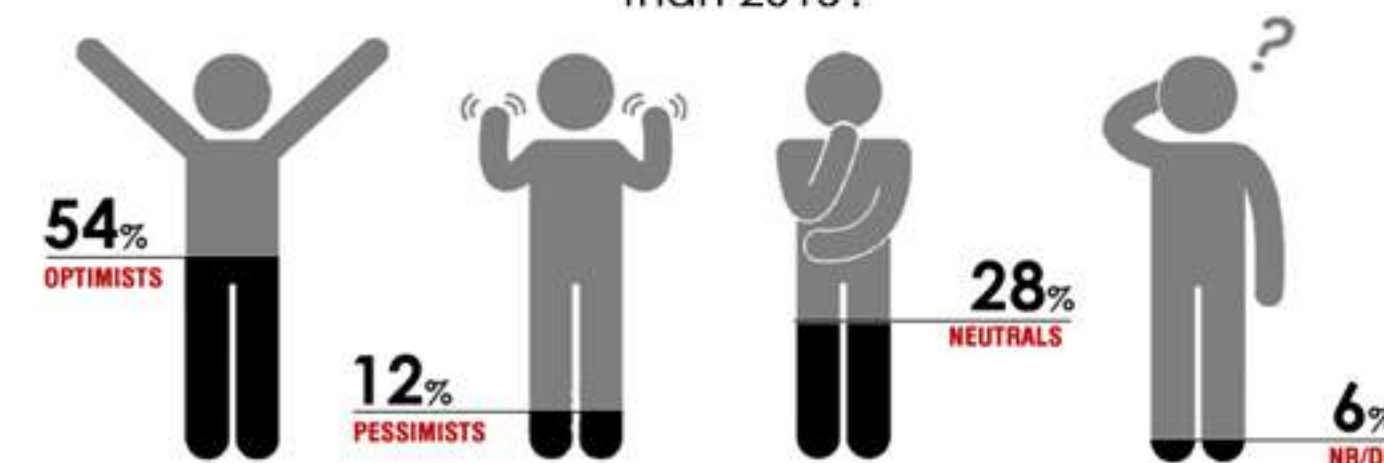
PAKISTAN AS THE 10TH 'MOST OPTIMISTIC' COUNTRY IN THE WORLD

Pakistan has performed well on this index by featuring in the top 10 'most optimistic' countries of the world. This high level of hope for the upcoming year has a net figure of 42% in which 54% think that the year 2016 would be better than 2015 and 12% think that 2016 would be worse. 28% were neutral and 6% did not respond. A comparison of this with the global results shows that Pakistan – with a net optimism level of 42% - has fared better than the average global statistic (38%). However, it is also important to underscore the fact that this higher net figure is not due to a higher percentage of respondents who are optimistic about the year 2016 (54% both in Pakistan and globally) but due to a lower percentage of Pakistanis who are pessimistic about 2016 (16% pessimistic globally and 12% pessimistic in Pakistan).

FIGURE 7

PAKISTAN RESULT ON HOPE

Question: As far as you are concerned, do you think that 2016 will be better, worse or the same than 2015?



Source: End Of Year Survey 2015; 66040 men and women across 68 countries surveyed

2. HOPE

HOPE IN PAKISTAN: DECLINING OR INCREASING?

A comparison of Pakistan's current results with the year 2014 has however shown a decrease in optimism. In 2014, net hope was 61% compared to 42% in 2015. There is also a marked decrease (16%) in respondents who said they are hopeful about the new-year followed by a 2% increase in those who are pessimistic about the year 2016.

This indicator has been regularly measured in since decades showing varying levels of hope and despair among the Pakistani masses. Twenty years ago in ,1994, net hope was at a low 2% after which it steadily rose every year reaching its peak at 49% in the year 1999. This net figure then dropped to 14% in 2001 and then rose again to 35% in 2002. After this, net level of hope dropped at each interval reaching an all-time low at -31% in 2008. In 2009, net happiness was -6%, in 2010 it was -15% and -2% in 2011. Thereafter it rose to 11% in 2013 and a sweeping 61% in 2014.

FIGURE 8

NET HOPE BETWEEN 1994 AND 2015

Question: As far as you are concerned, do you think that 2016 will be better, worse or the same than 2015?



— Net Hope

Source: WIN Gallup International Annual Global Poll/EOY, December 2015
Note: Net Hope here is defined as the net score of Optimists over Pessimists

PAKISTAN'S COMPARISON WITH OTHER COUNTRIES:

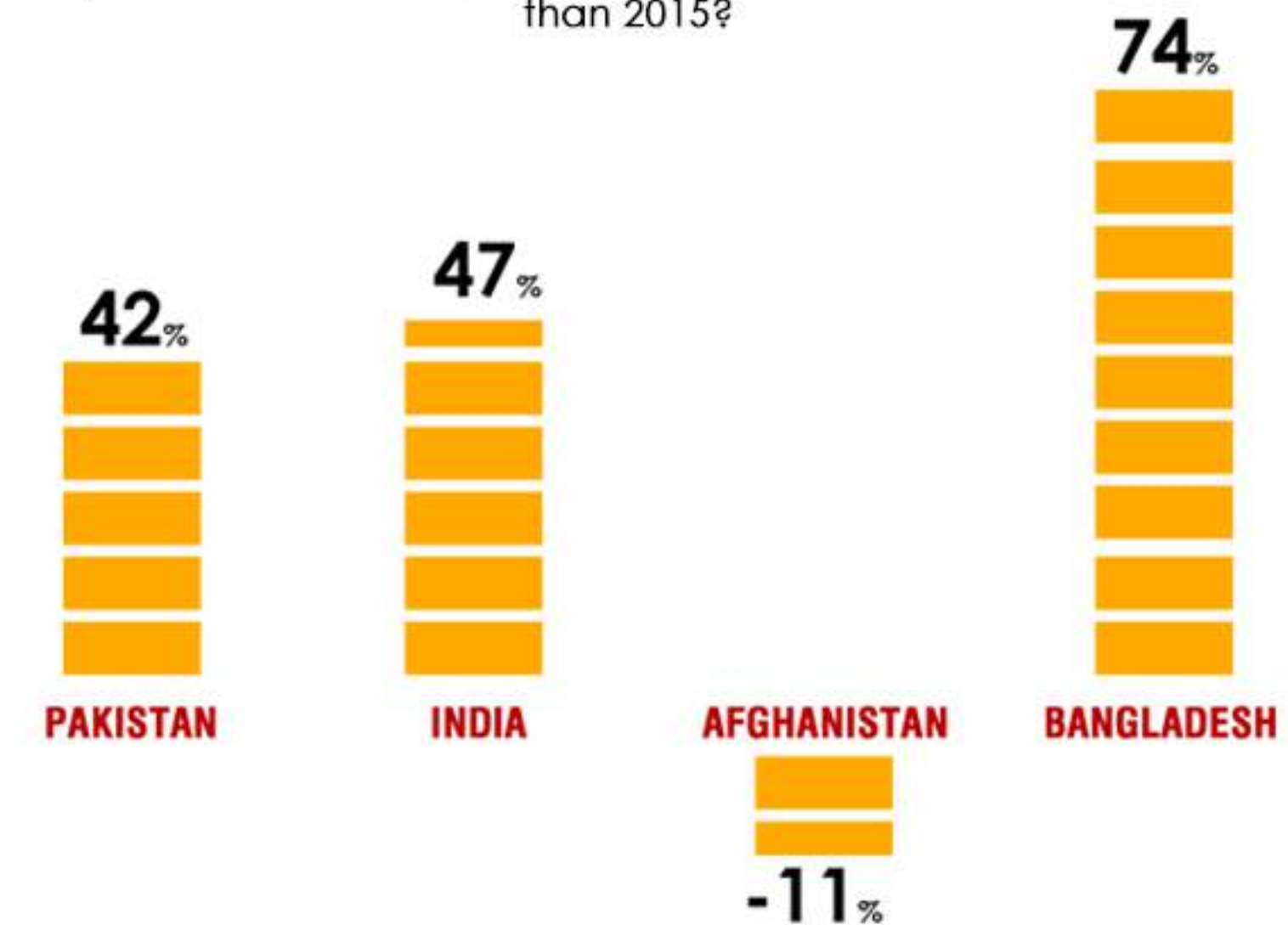
PAKISTAN'S NET SCORE HIGHER THAN AFGHANISTAN BUT LOWER THAN INDIA AND BANGLADESH.

Pakistan's comparison with its region has indicated lower net levels of hope with respect to the average net score of West and South Asia. Thus while the entire region has a net score of 48%, Pakistan's score is lower at 42%. With regards to specific countries, Pakistan's score is higher than Afghanistan (-11%) however it is lower than both India (47%) and Bangladesh (74%).

FIGURE 9

PAKISTAN'S COMPARISON WITH OTHER COUNTRIES

Question: As far as you are concerned, do you think that 2016 will be better, worse or the same than 2015?



Source: WIN Gallup International Annual Global Poll/EOY, December 2015
Note: Net Hope here is defined as the net score of Optimists over Pessimists

PAKISTAN'S COMPARISON WITH OTHER REGIONS:

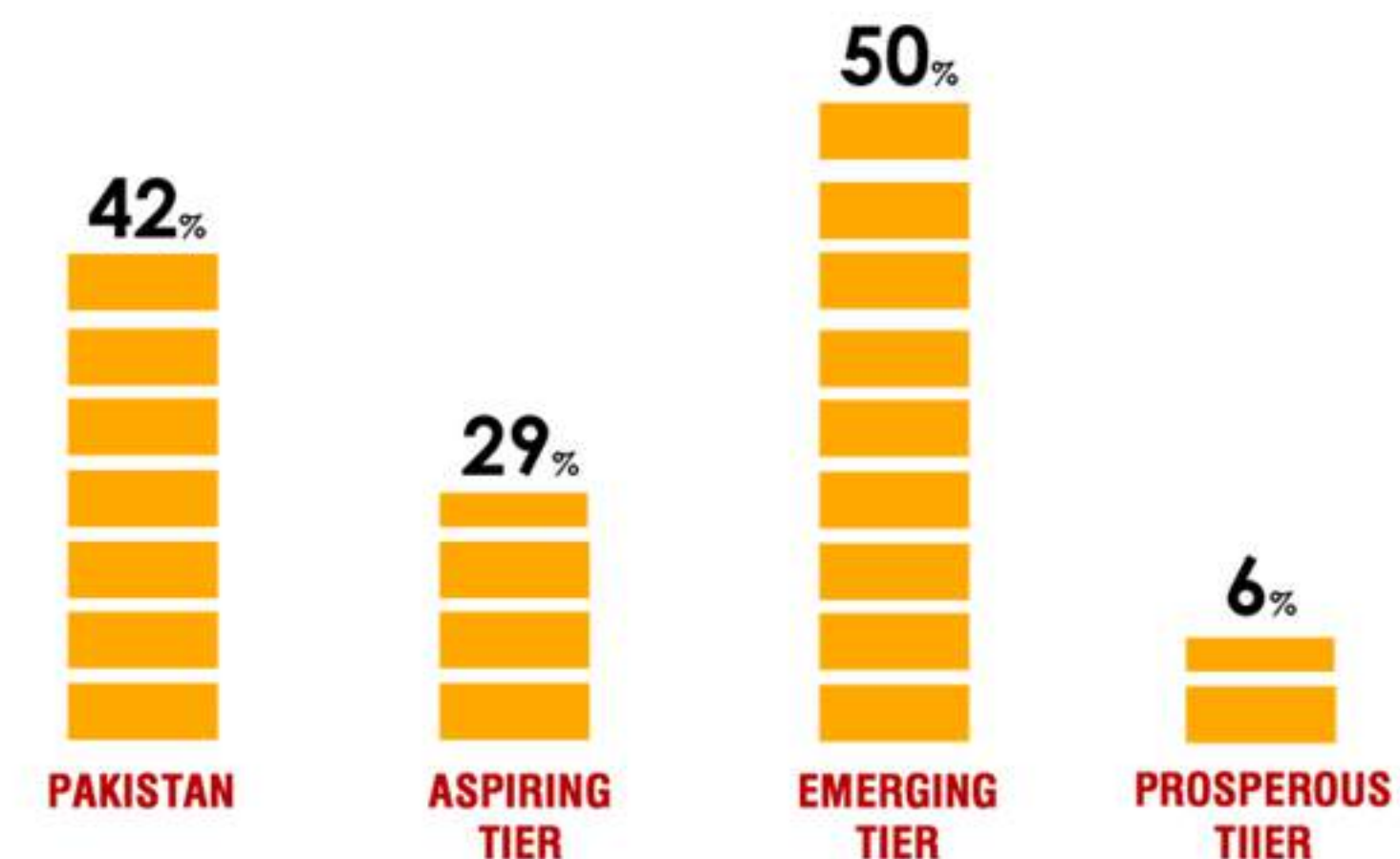
PAKISTAN'S NET SCORE HIGHER THAN AVERAGE NET SCORE OF ASPIRING AND PROSPEROUS COUNTRIES HOWEVER LOWER THAN NET SCORE OF EMERGING COUNTRIES.

According to the T3 Classification (Prosperous, Emerging and Aspiring countries), Prosperous countries had the least net level of hope at 6%. This was followed by Aspiring countries at 29% and the highest average net score was 50% for Emerging countries. Thus a comparison of Pakistan's net hope (42%) with the average figure for Aspiring countries (29%) shows it to have performed better on levels of optimism.

FIGURE 10

PAKISTAN'S COMPARISON WITH OTHER REGIONS

Question: As far as you are concerned, do you think that 2016 will be better, worse or the same than 2015?



Source: WIN Gallup International Annual Global Poll/EOY, December 2015
Note: Pakistan is itself a part of the 'Aspiring Countries'

GLOBAL RESULTS

GLOBAL RESULTS: 45% OF THE WORLD OPTIMISTIC ABOUT ECONOMIC OUTLOOK FOR 2016; 22% IS PESSIMISTIC

The third indicator was to gauge levels of optimism regarding economic prosperity of the country. Respondents across the world were asked the following question, "Compared to this year, in your opinion, will next year be a year of economic prosperity, economic difficulty or remain the same for your country?" According to the results, 45% of the world is optimistic about the economic outlook for the next year; 22% is pessimistic and 28% believes the economy will remain the same. The most optimistic country about economic prosperity is Nigeria (61% net optimistic), followed by Bangladesh, China and Vietnam. In contrast, Greece is the most pessimistic (-65% net optimistic country).

FIGURE 11

GLOBAL RESULT ON ECONOMIC OPTIMISM

Question: Compared to this year, in your opinion, will next year be a year of economic prosperity, economic difficulty or remain the same for your country?



Source: End Of Year Survey 2015; 66040 men and women across 68 countries surveyed

PAKISTAN'S RESULTS

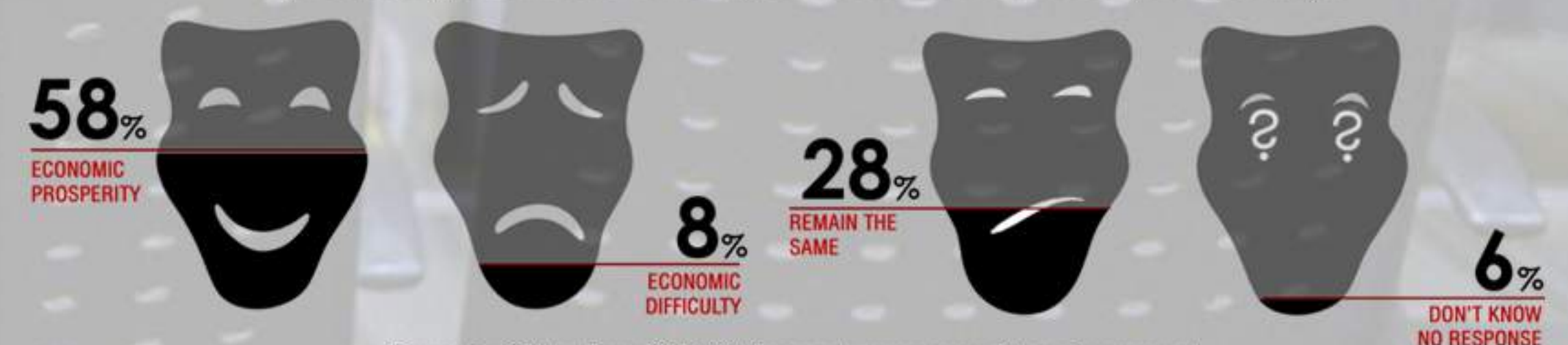
58% PAKISTANIS OPTIMISTIC ABOUT PAKISTAN'S ECONOMIC PROSPERITY IN 2016; 8% PESSIMISTIC

Regarding economic prosperity, Pakistanis have high levels of optimism with a net score of 50%. 58% Pakistanis said that they are optimistic about Pakistan's economic prosperity in the upcoming year. 8% on the other hand were pessimistic and 28% were neutral. 6% did not respond. This high level of net optimism is also greater than the global net statistic (23%) placing Pakistan at the 5th position in terms of economic optimism amongst 68 countries across the globe.

FIGURE 12

PAKISTAN RESULT ON ECONOMIC OPTIMISM

Question: Compared to this year, in your opinion, will next year be a year of economic prosperity, economic difficulty or remain the same for your country?



Source: End Of Year Survey 2015; 66040 men and women across 68 countries surveyed

3. ECONOMIC OPTIMISM

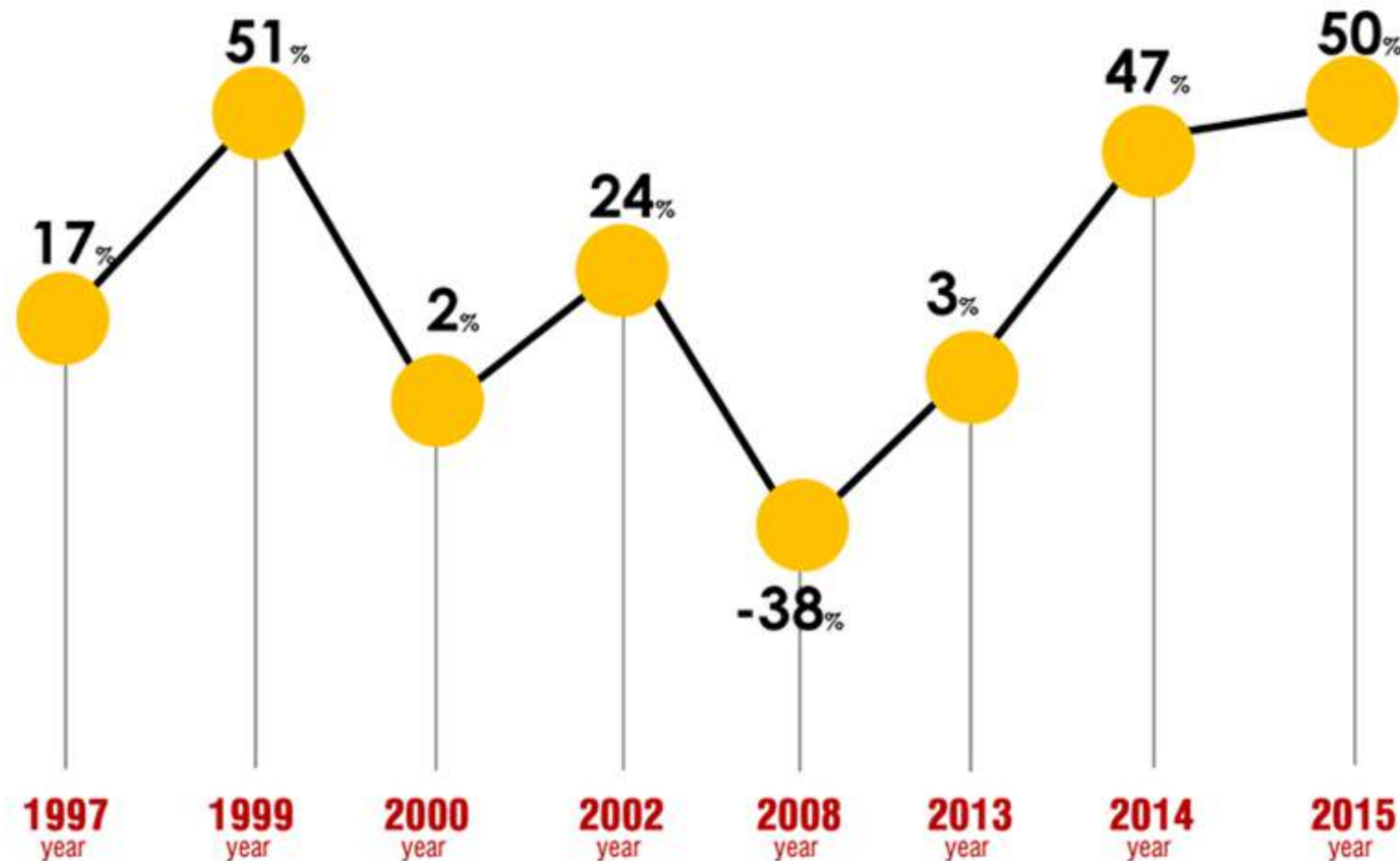
PERCEPTIONS OF ECONOMIC PROSPERITY IN PAKISTAN: DECLINING OR RISING?

A trend analysis of public views about economic prosperity in the country indicates a turbulent trajectory since the year 1997. In 1997, net economic optimism was 17% which rose to 51% in 1999. This decreased drastically to 2% in 2000 after which it rose again to 24% in 2002. Economic optimism was modest between 2002 and 2006 after which it fell drastically in 2007 and reached its lowest at -38% in 2008. This figure continued to remain negative until 2011 after which it rose to 3% in 2013. From 2014 onwards however, net optimism about economic prosperity in the following year saw a significant upward leap to 47% in 2014 and 50% in 2015.

FIGURE 13

NET HOPE BETWEEN 1994 AND 2015

Question: Compared to this year, in your opinion, will next year be a year of economic prosperity, economic difficulty or remain the same for your country?



Source: WIN Gallup International Annual Global Poll/EOY, December 2015
Note: Net Optimism here is defined as the net score of Optimists over Pessimists about Economic Prosperity

PAKISTAN'S COMPARISON WITH OTHER COUNTRIES:

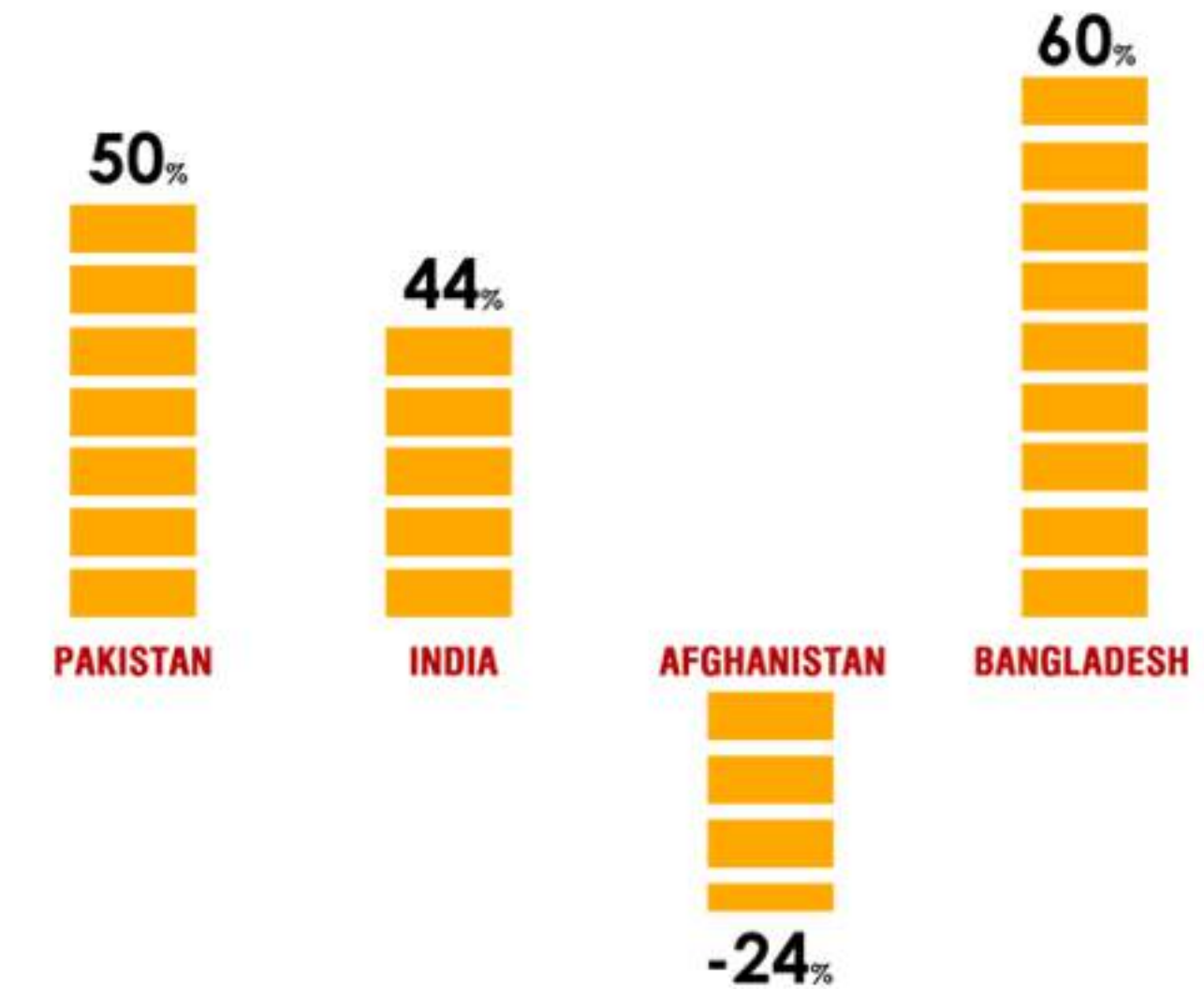
PAKISTAN'S NET OPTIMISM HIGHER THAN INDIA AND AFGHANISTAN BUT LOWER THAN BANGLADESH

Globally, West and South Asia have shown the most positive results regarding opinions on economic prosperity. 60% respondents claimed to be optimistic about economic prosperity in the following year while 15% claimed to be pessimistic about it and 20% were neutral. In this regard Pakistan has shown higher net positive perceptions (50%) than the South Asian region (45%). With regards to specific countries, Pakistan has shown higher net scores than India (44%) and Afghanistan (-24%) but lower than Bangladesh (60%).

FIGURE 14

PAKISTAN'S COMPARISON WITH OTHER COUNTRIES

Question: Compared to this year, in your opinion, will next year be a year of economic prosperity, economic difficulty or remain the same for your country?



Source: WIN Gallup International Annual Global Poll/EOY, December 2015
Note: Net Hope here is defined as the net score of Optimists over Pessimists

PAKISTAN'S COMPARISON WITH OTHER REGIONS:

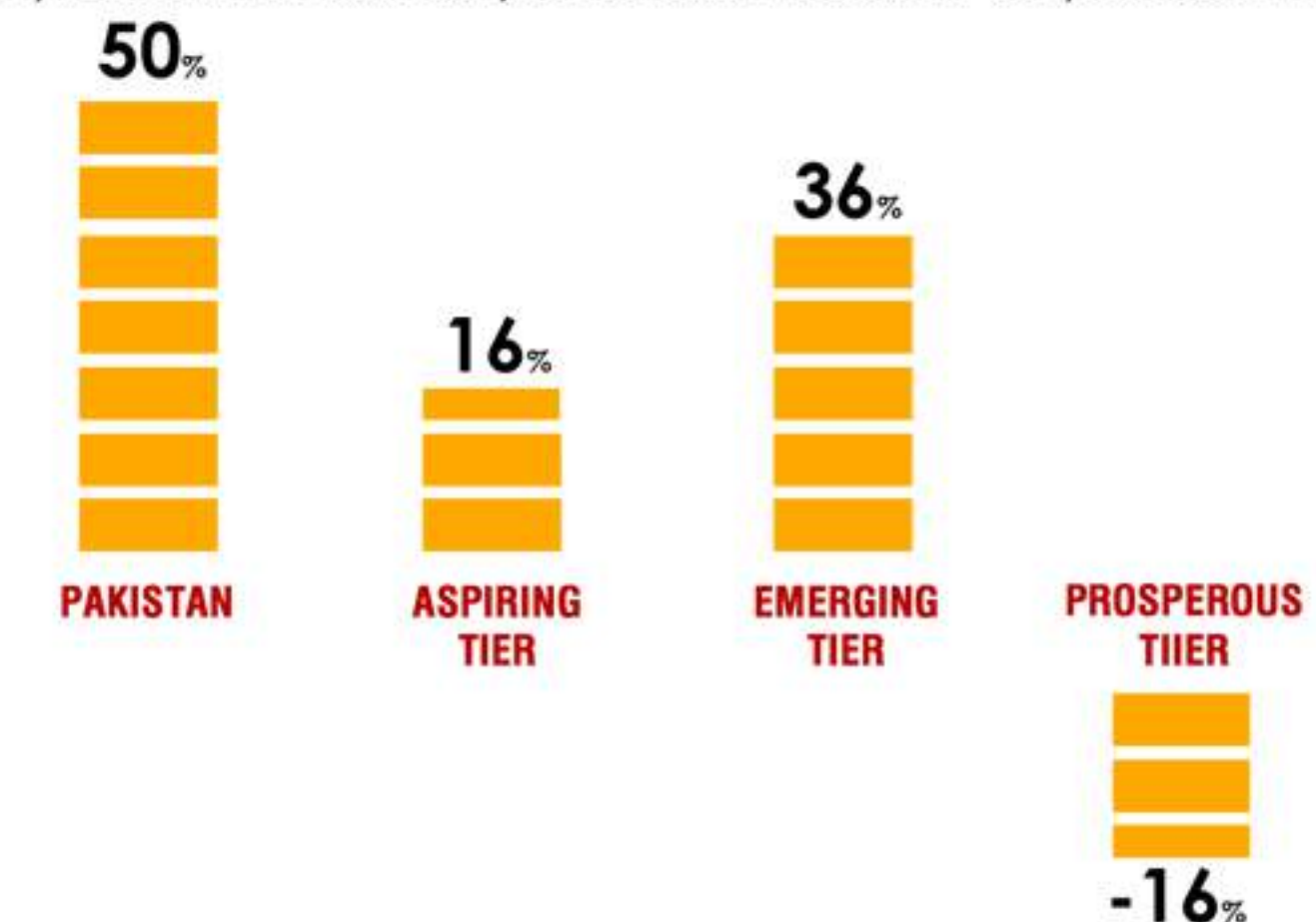
PAKISTAN'S NET OPTIMISM HIGHER THAN ASPIRING COUNTRIES.

According to the T3 classification (Prosperous, Emerging and Aspiring countries), Emerging countries have shown the most optimism with a net score of 36% followed by Aspiring countries with a net score of 16%. Prosperous countries have quite ironically, shown negative net scores at -16% thus showing that they are not optimistic about economic prosperity in the upcoming year. Furthermore, Pakistan's comparison with other Aspiring countries have shown a positive trend with 16% being the average net score for Aspiring countries and 50% being the net optimism score for Pakistan.

FIGURE 15

PAKISTAN'S COMPARISON WITH OTHER REGIONS

Question: Compared to this year, in your opinion, will next year be a year of economic prosperity, economic difficulty or remain the same for your country?



Source: WIN Gallup International Annual Global Poll/EOY, December 2015
Note: Pakistan is itself a part of the 'Aspiring Countries'

As 2015 draws to a close, global results have shown a positive picture particularly with regards to levels of happiness across countries. Although the figure of happiness has gone slightly down from 70% in 2014 to 66% in 2014, it is still high compared to figures on the other two indicators i.e. hope and optimism regarding economic prosperity in the upcoming year. Furthermore, figures of net happiness have remained high across the different classifications (Prosperous 42%, Emerging 59% and Aspiring 54%). It is ironic however, that countries in the Prosperous tier have shown the least positive results in all three indicators. Thus despite their higher levels of income, standards of living and socio-economic status, Prospering countries continue to show low levels of satisfaction and contentment in personal lives. On the other hand, Emerging countries, which are on a positive economic and developmental trajectory, and Aspiring countries (typically also seen as the developing countries) have shown higher levels of hope and optimism about the future whether generally or economically. Current income levels, financial security and overall development in the country thus do not seem to have a significant amount of bearing on feelings of life satisfaction among the common citizens.

With specific regards to Pakistan, it has continued to show high levels of happiness for the year 2015. This was followed by high levels of optimism regarding economic prosperity and hope in the coming year, a trend that has been set since 2014. If linked to the socio political scenario, it seems that the elections of 2013 have brought about a new sense of optimism and positive anticipation about the future. By voting for their favored political parties in the provinces and at the federal level, Pakistan masses seem to have consolidated their faith and trust in the democratic apparatus of the country leading to positive perceptions about the upcoming year. Furthermore, with regards to current economic projects in the country – notably the Pak-China Economic Corridor – Pakistani masses seem to have registered higher optimism about economic prosperity on the eve of 2015 for the following year.