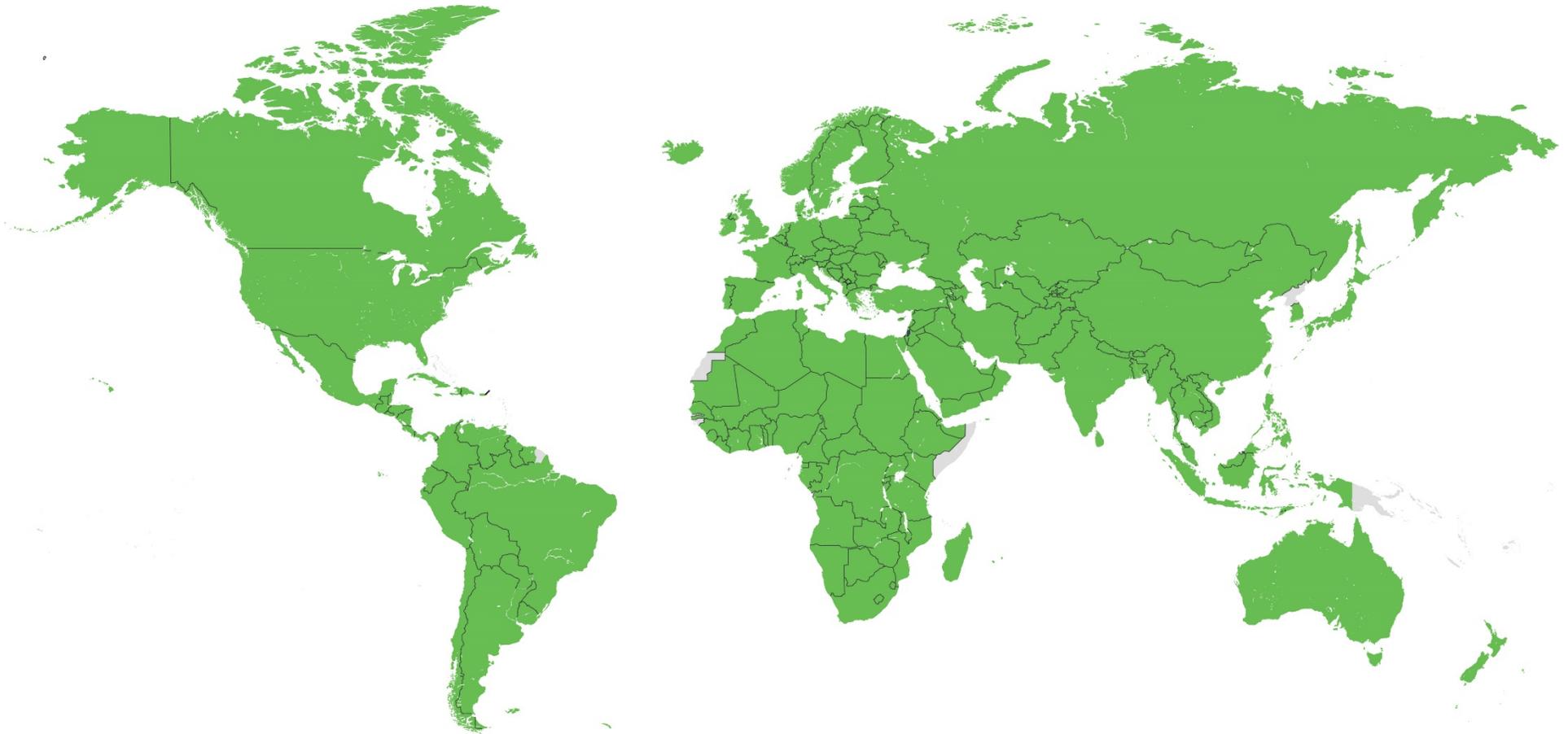




Afghanistan at a Glance

Findings from the World Poll

Gallup World Poll coverage



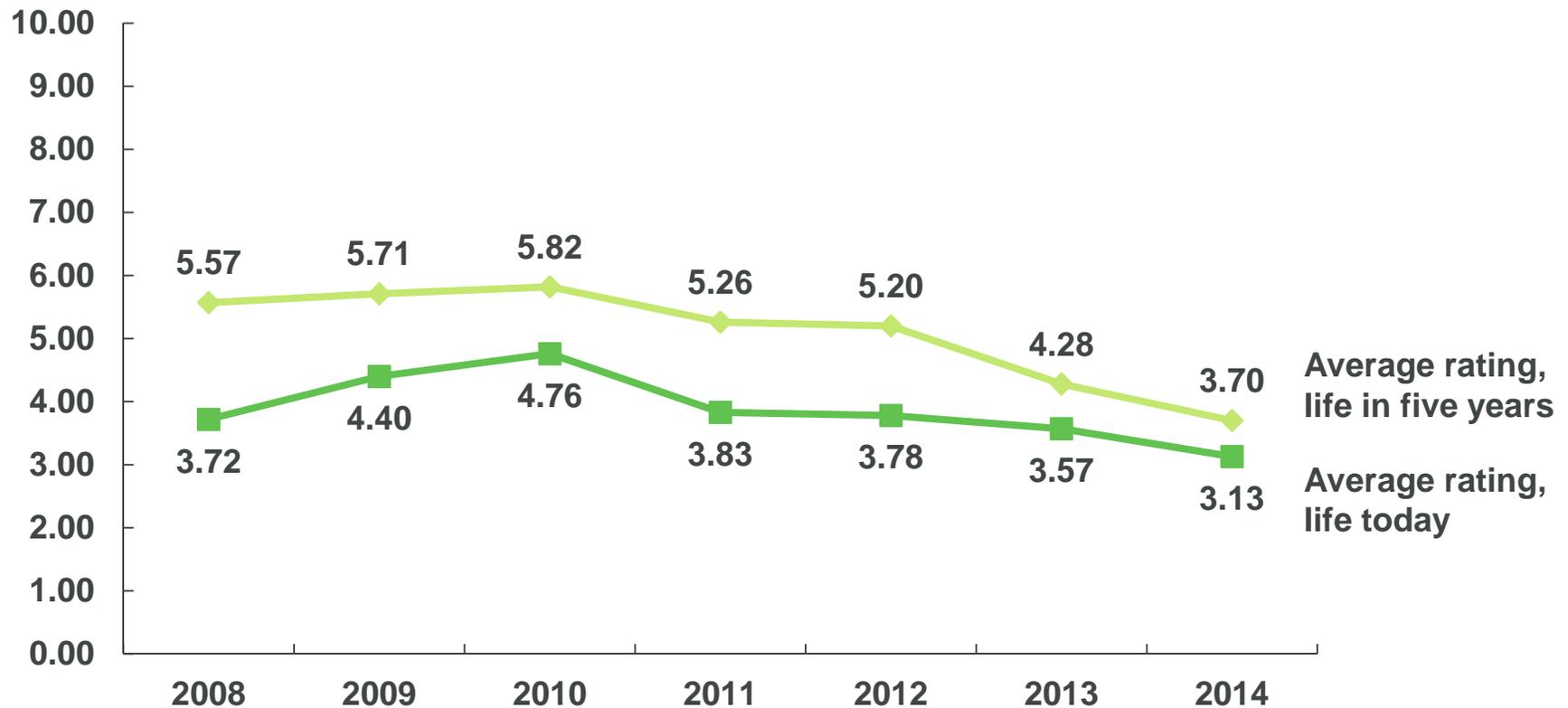
Gallup World Poll Methodology



- 9 surveys since 2008
- Last survey – August 2014
- Nationally representative of all Afghans 15 years or older
- Sample size: Approximately 1,000 per survey
- Mode: Face to face
- MoE \pm 3.8 percentage points

Afghans' Life Ratings Hit New Low Point

Please imagine a ladder with steps numbered from 0 to 10. On which step would you say you currently stand? On which step do you think you will stand five years from now?

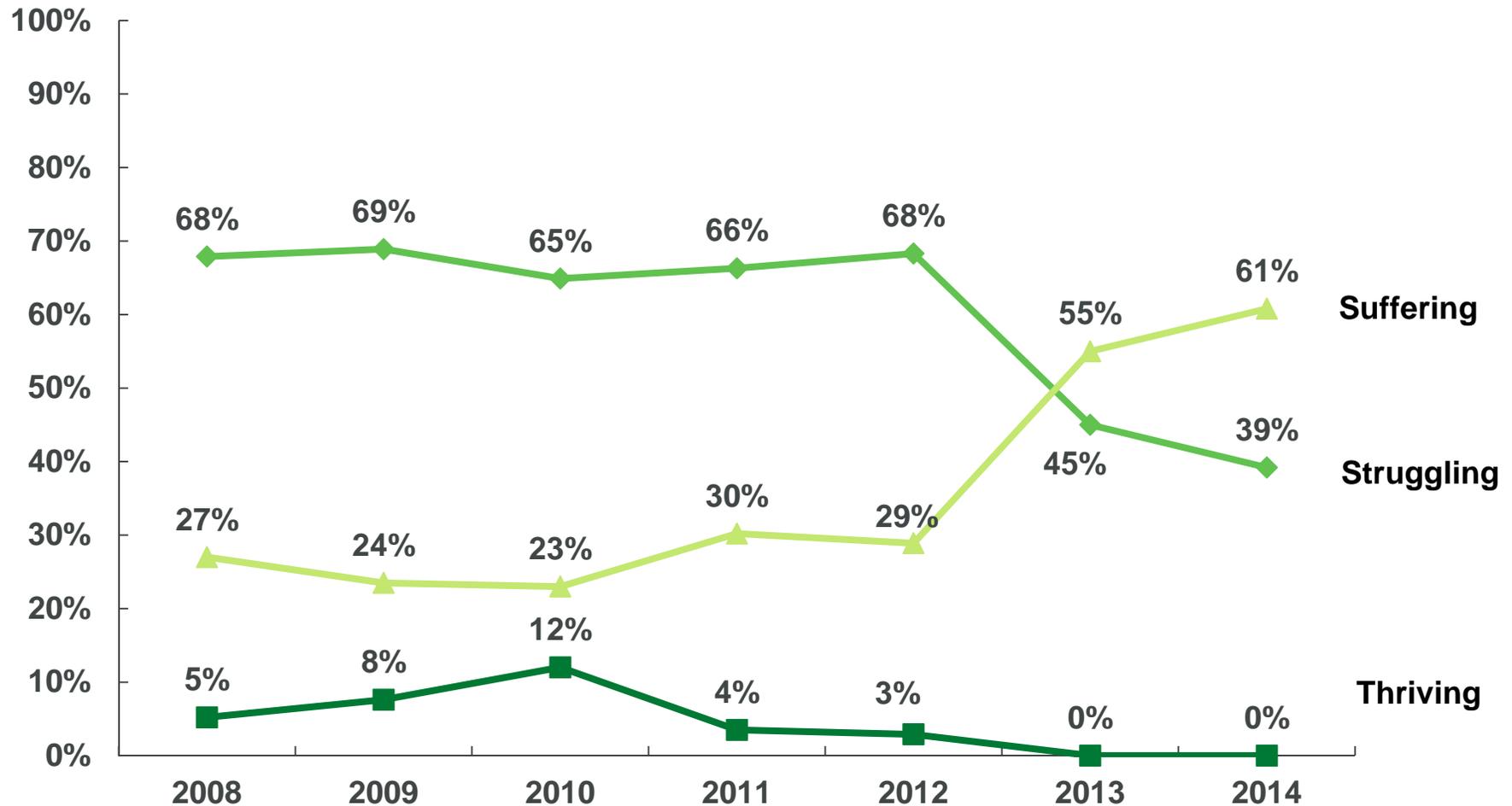


Measuring Life Evaluation

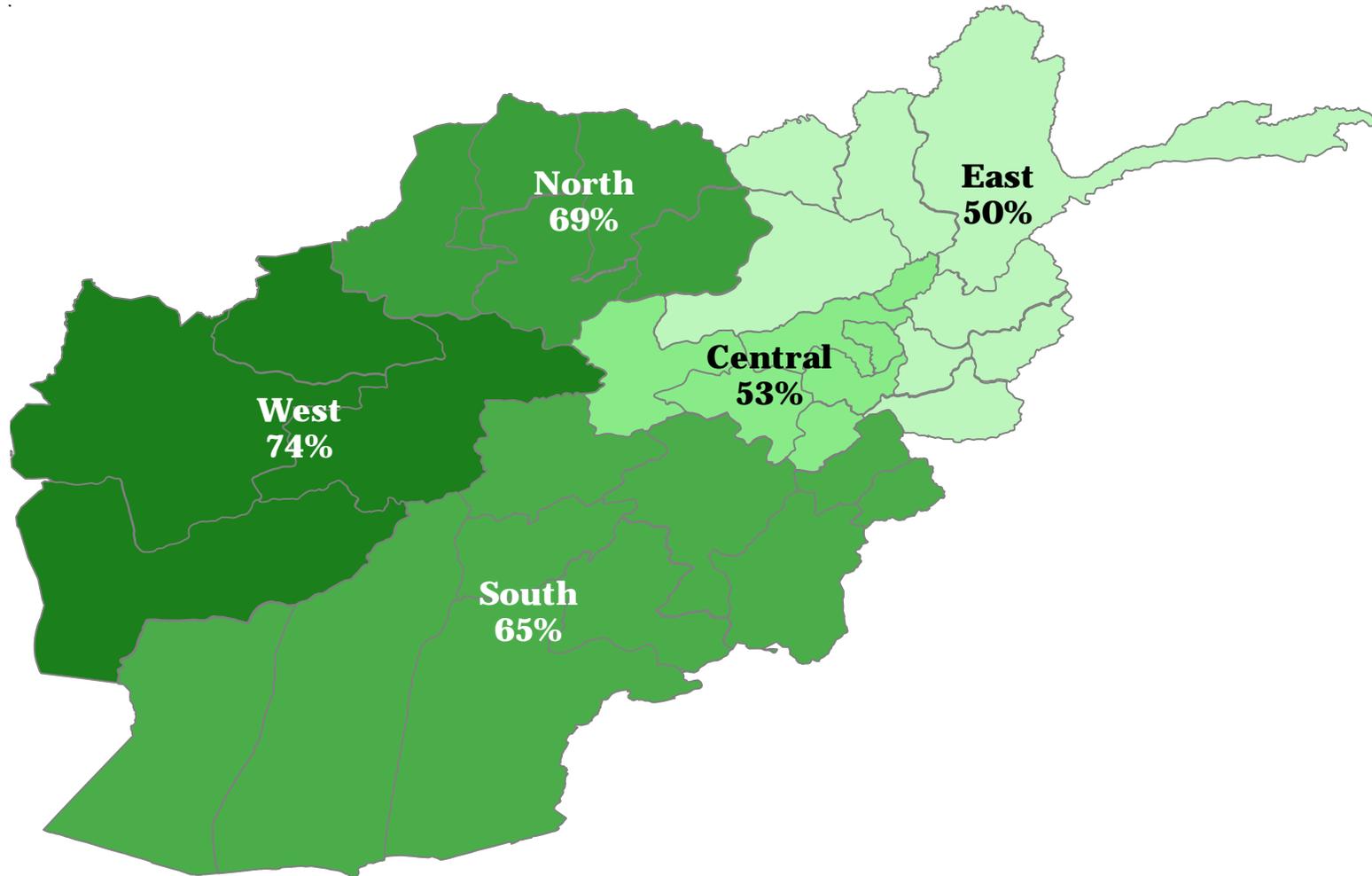
Gallup tracks the prevalence of three categories based on respondents' present and future life ratings, on a 0 to 10 scale:

Thriving	Struggling	Suffering
<p>Respondents have positive views of their present life situation (7+) AND a positive view of where their lives will be in five years (8+).</p>	<p>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.</p>	<p>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).</p>

No Afghans Are “Thriving;” “Suffering” Topped 60% This Year

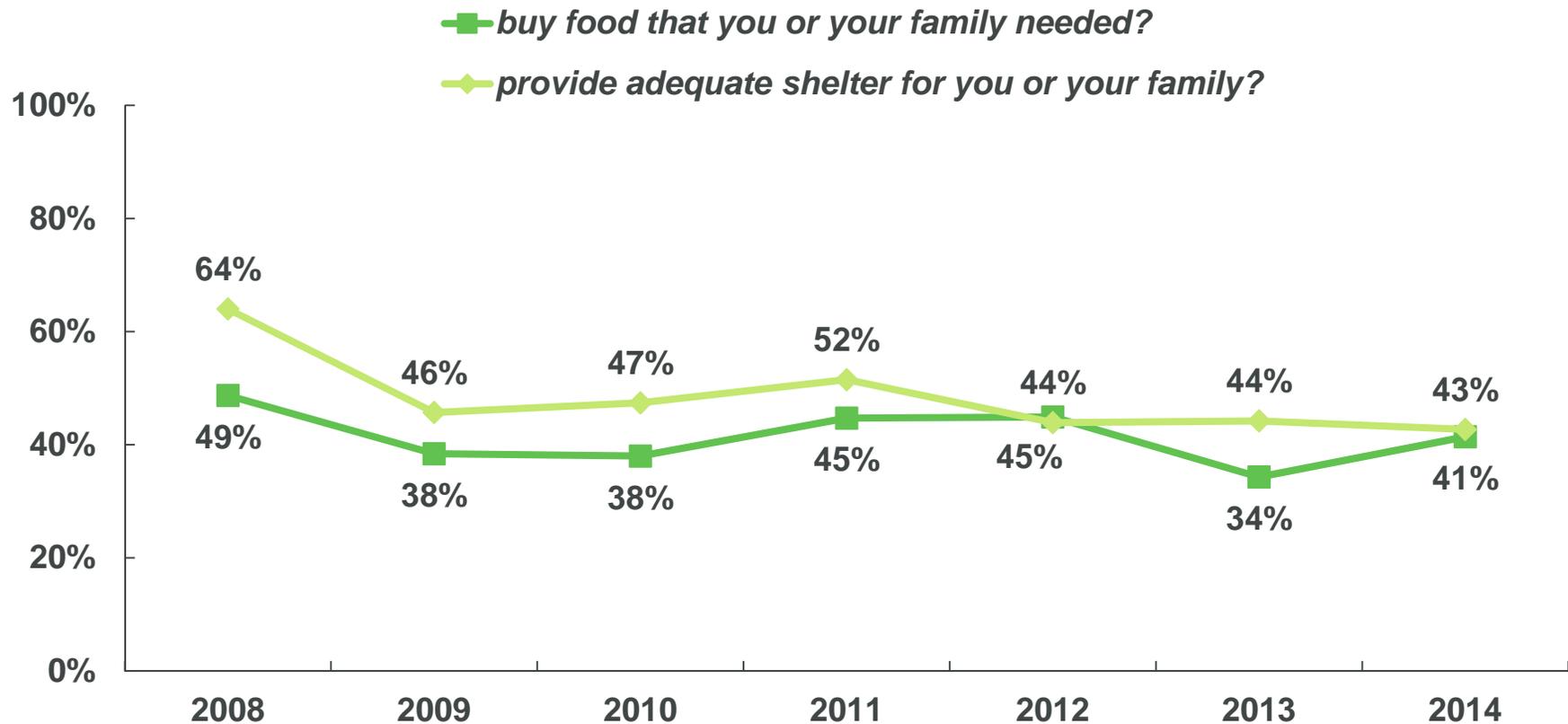


“Suffering” Most Prevalent in Western Afghanistan



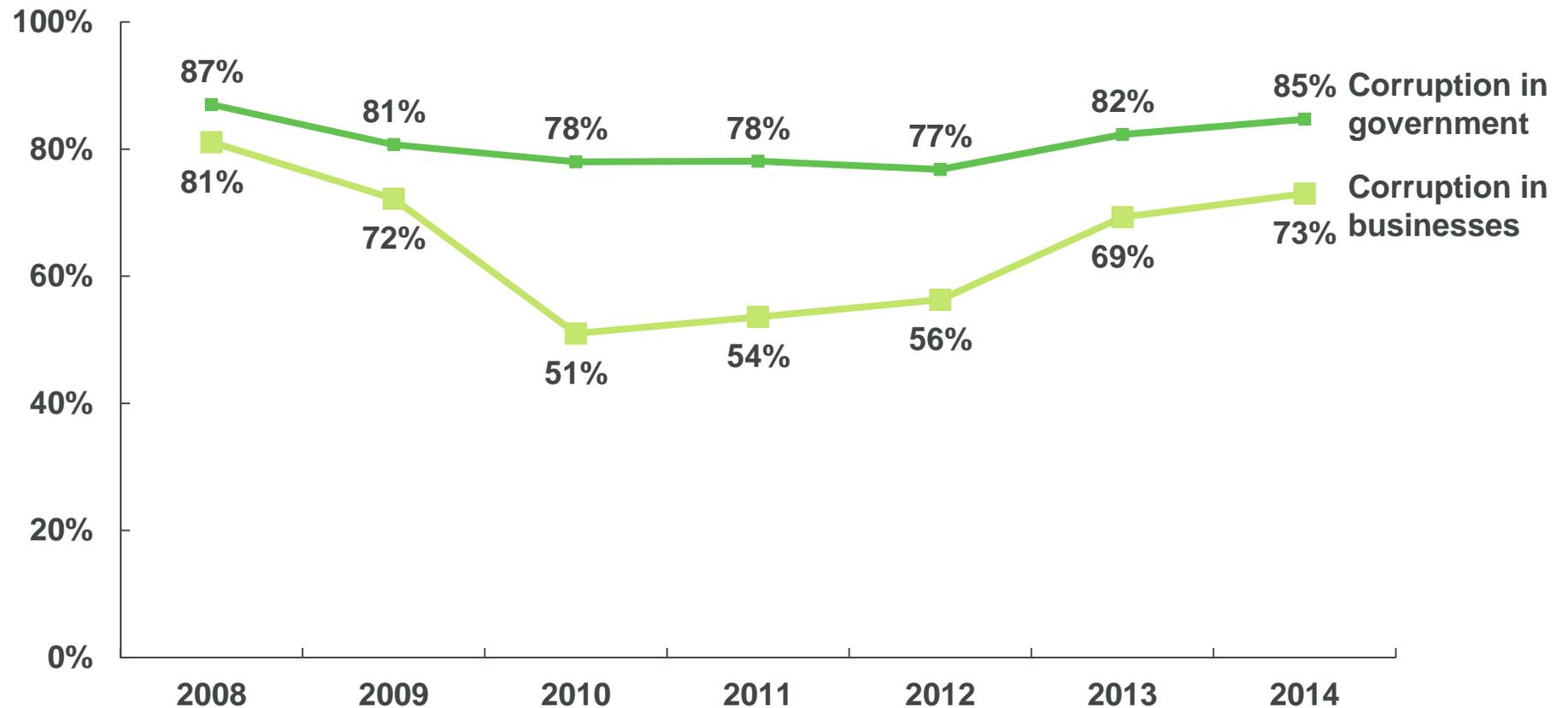
Many Afghans Have Trouble Meeting Basic Needs

Have there been times in the past 12 months when you did not have enough money to _____?



Most Afghans Continue to Believe Corruption is Widespread in Businesses and Government

Is corruption widespread throughout the government/businesses in this country? (%Yes)

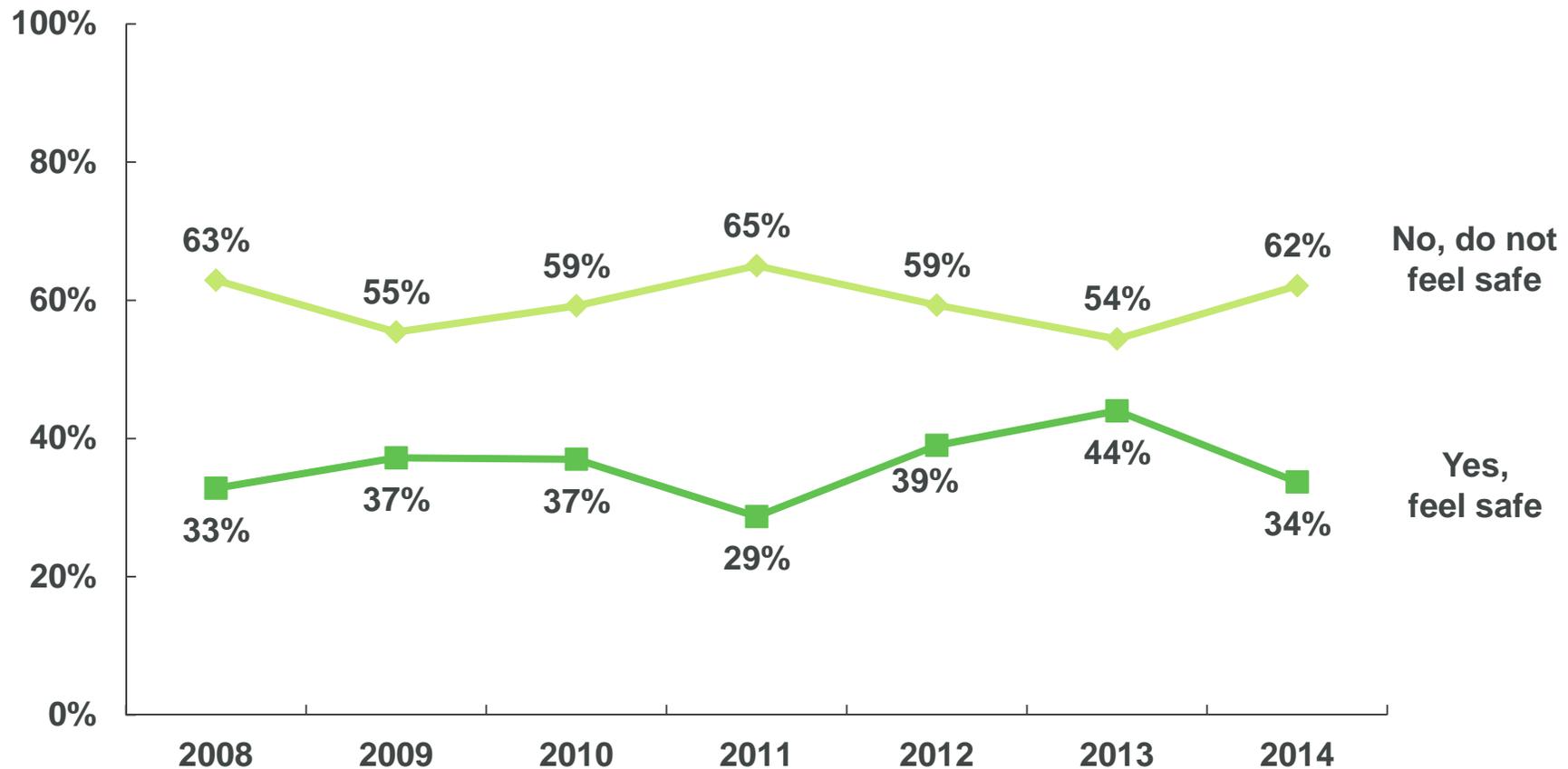




Security, NATO and the Taliban

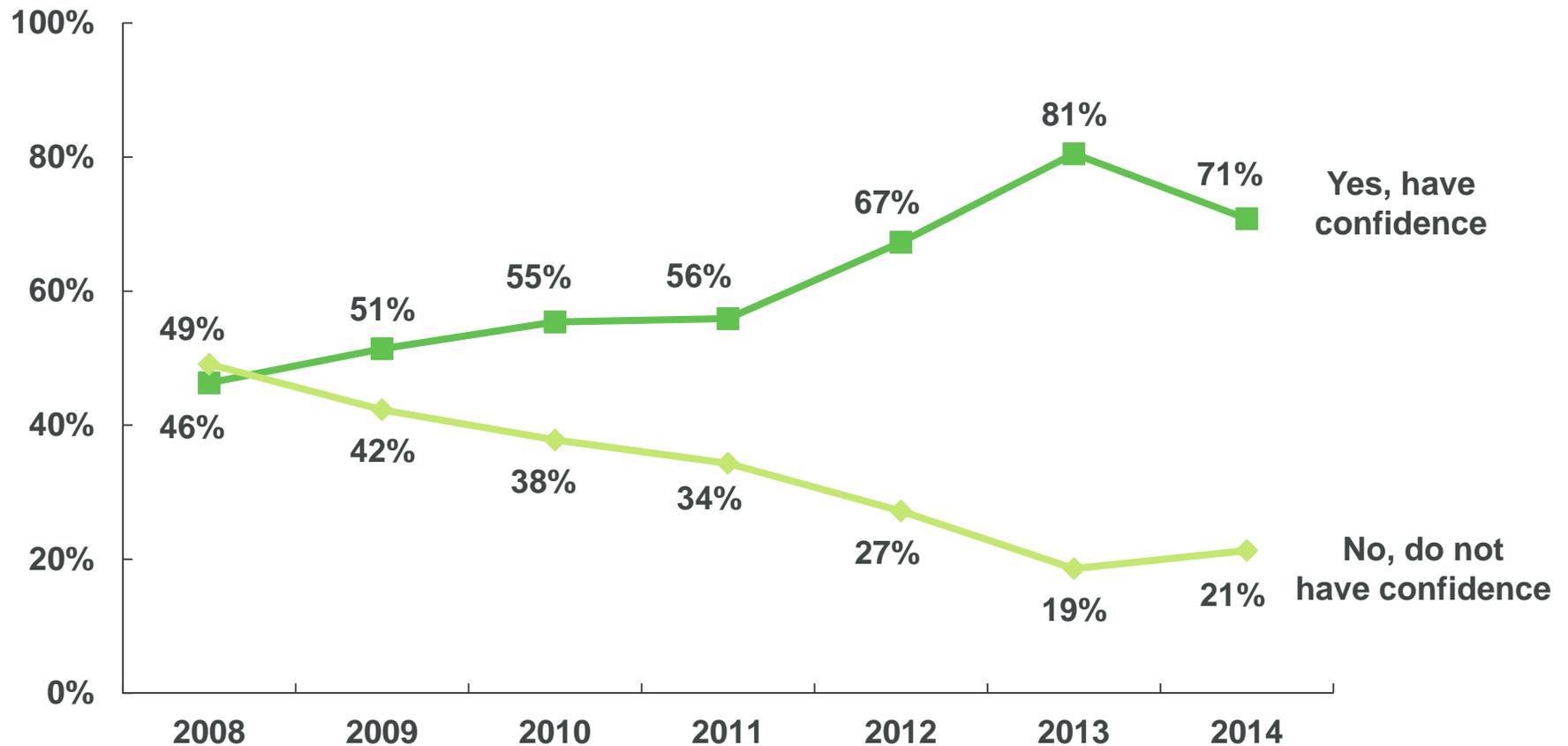
Most Afghans Do Not Feel Safe Walking Alone in Their Communities at Night

Do you feel safe walking alone at night in the city or area where you live?



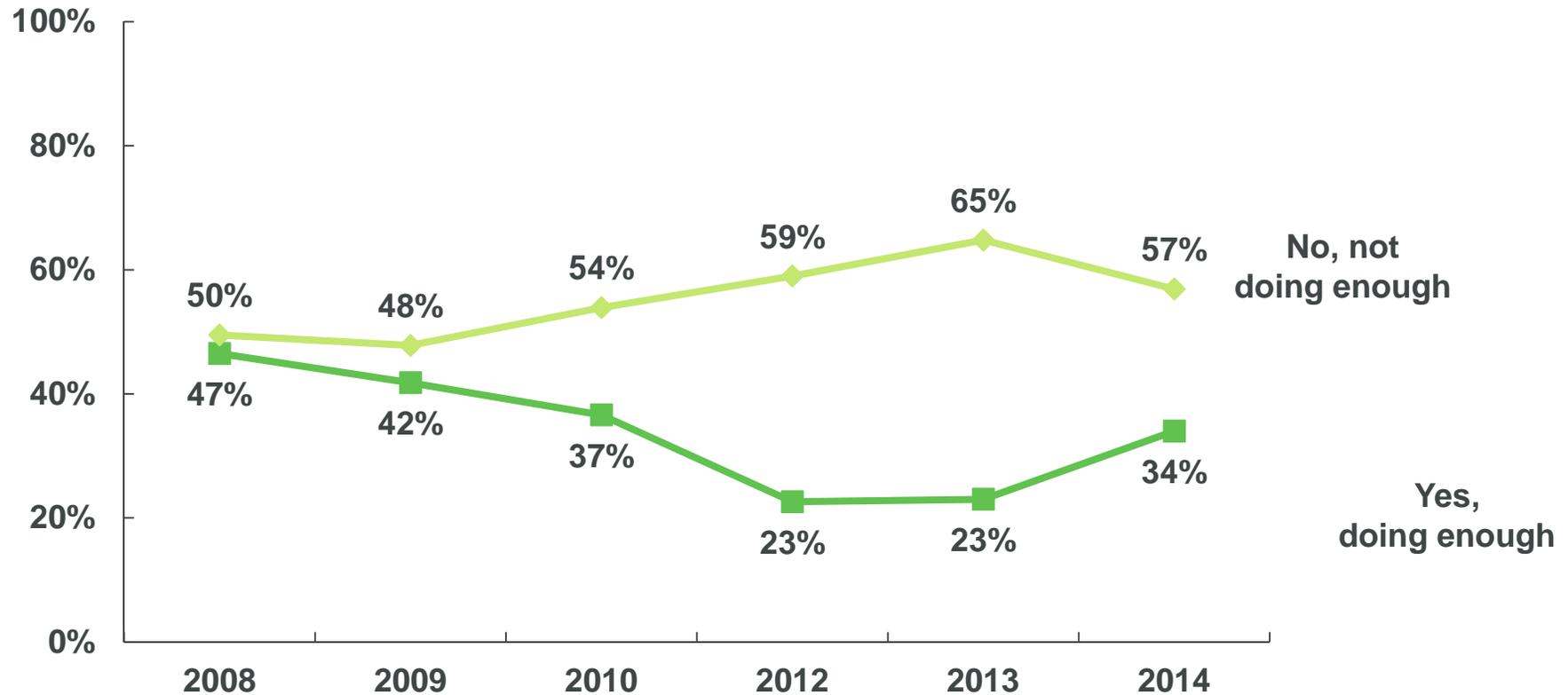
Confidence in the Military Ended Its Upward Trend in 2014

In this country, do you have confidence in the military, or not?



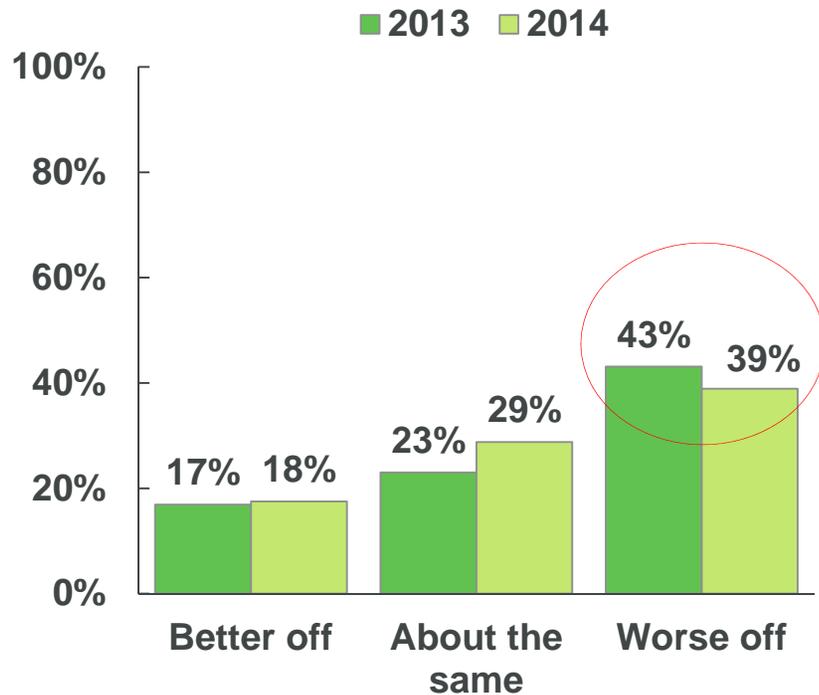
One-Third of Afghans Say Government is Doing Enough to Fight Terrorism

Do you think the government is doing enough to fight terrorism, or not?

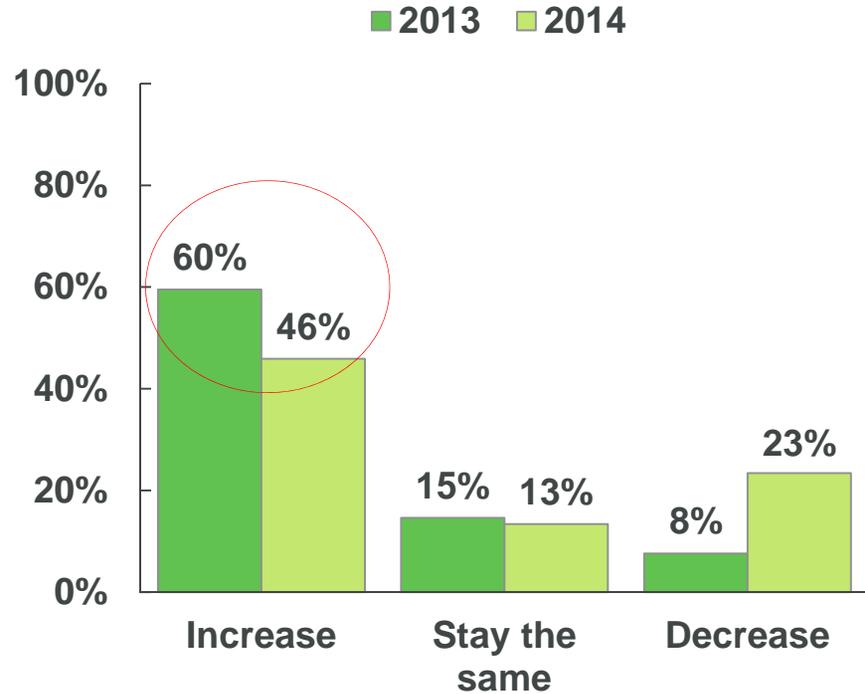


On Balance, Afghans Are Pessimistic About the Withdrawal of U.S./NATO Forces

U.S. and NATO forces have announced that the majority of forces will be withdrawing from Afghanistan in 2014. Will Afghans be better off, about the same, or worse off when that happens?

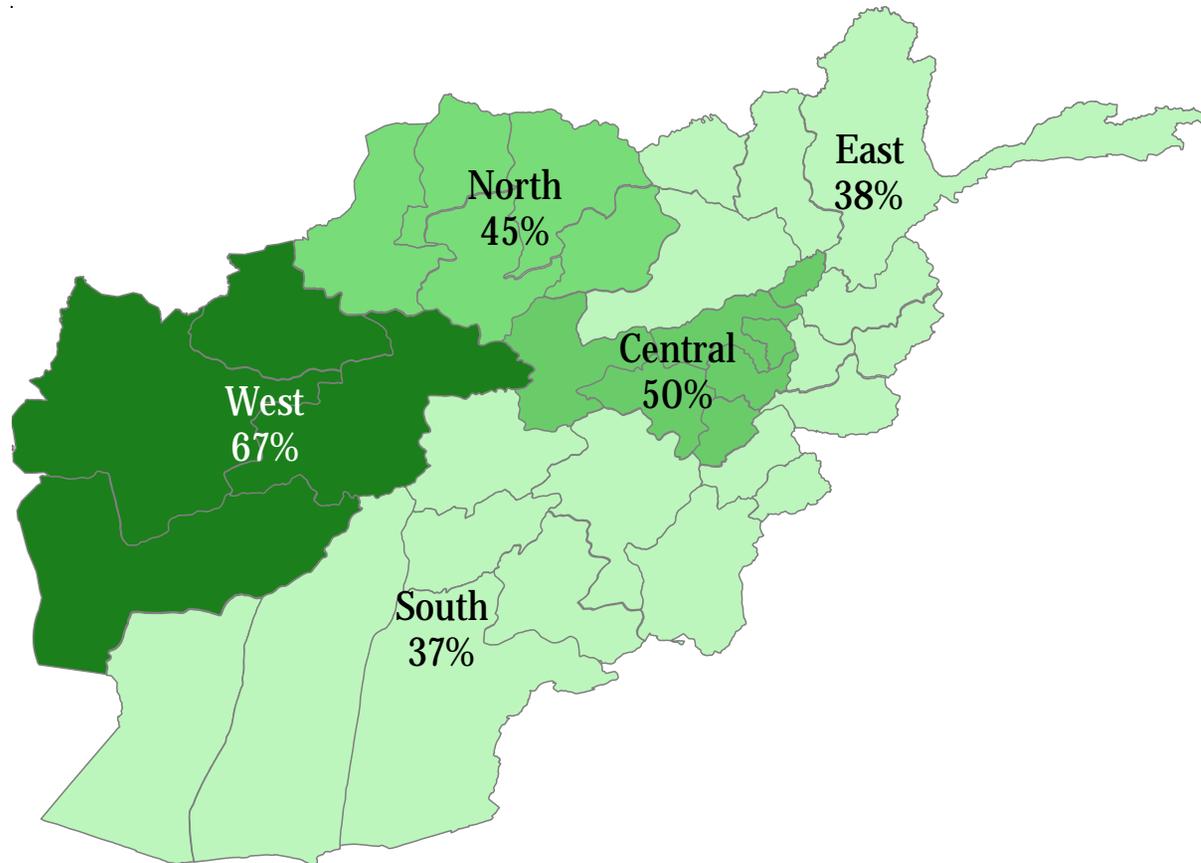


Do you think the presence of the Taliban in Afghanistan will increase, stay the same, or decrease after U.S. and NATO forces withdraw in 2014?



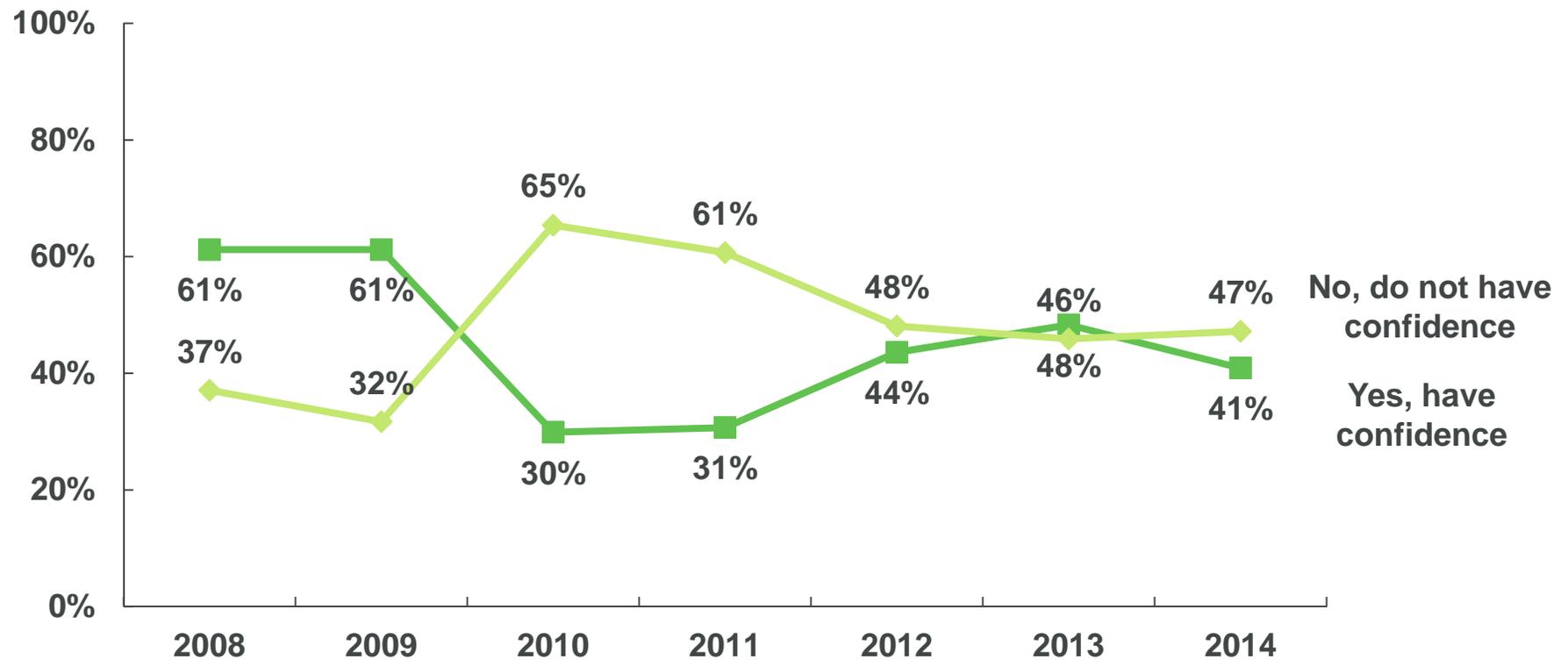
Fears of Taliban Resurgence Most Prevalent in West

Percentage in each region who believe the Taliban's presence will increase.



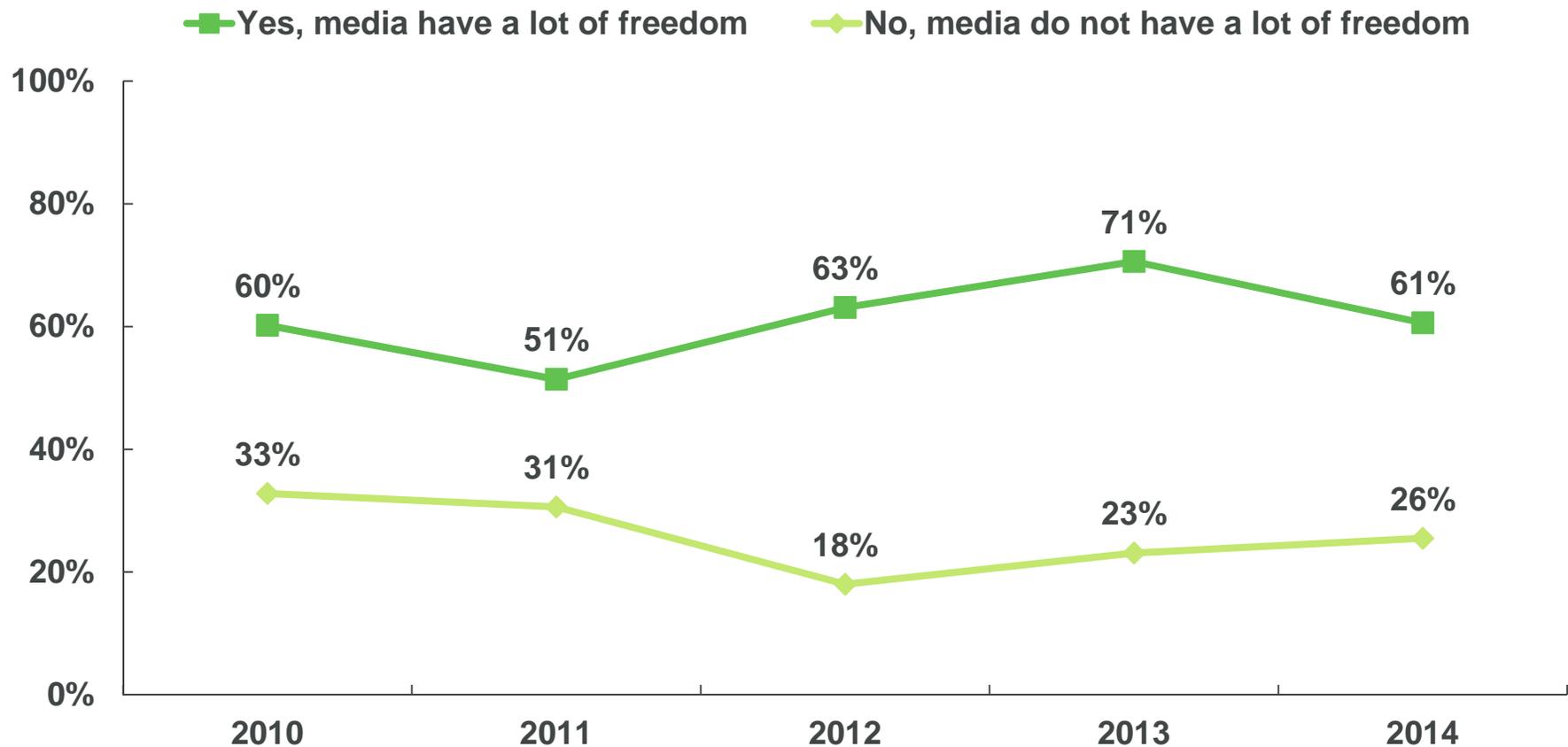
Four in 10 Afghans Are Confident in the National Government

In this country, do you have confidence in the national government, or not?



Six in 10 Currently Believe Media in the Country Have a Lot of Freedom

Do the media in this country have a lot of freedom, or not?





Media Use for News in Afghanistan

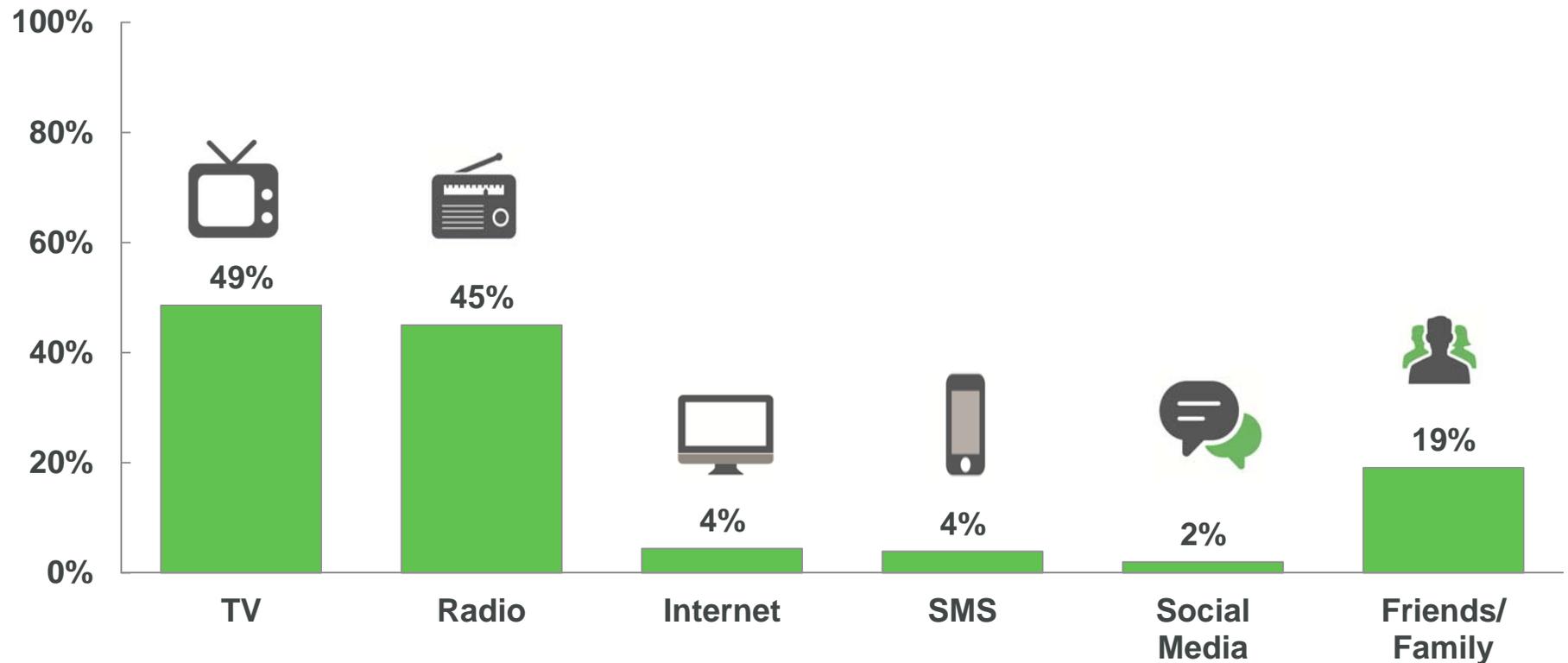
Media Study Methodology

- Face-to-face survey of 2,000 randomly selected adults (aged 15 and older) with an additional 500 interviews in urban areas
- Nationally representative of more than 15.6 million adults
- Fieldwork conducted from June 2 – 23, 2014
- Data weighted for age, gender, region, and educational attainment



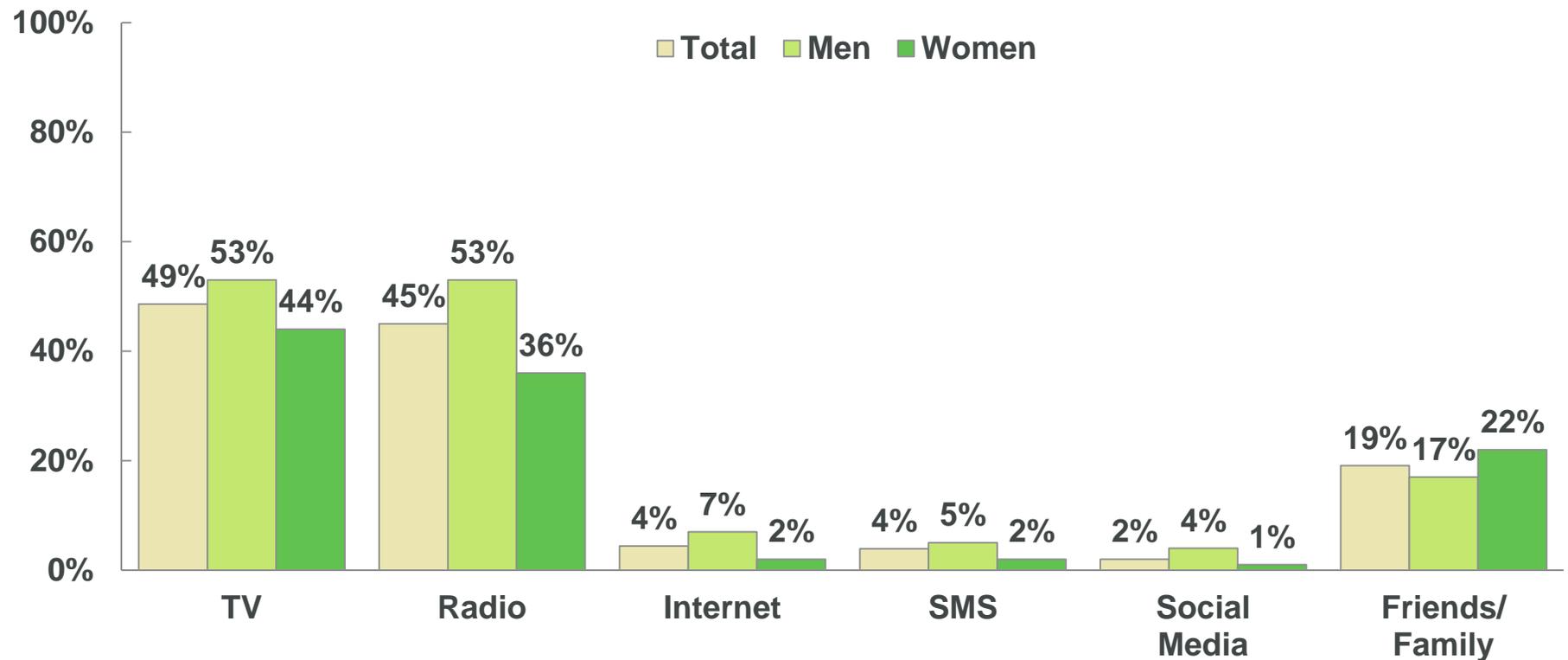
Media Use for News

For each one of the sources I mention, please tell me how often you use that source to get news. (% who use the source “daily or most days”)



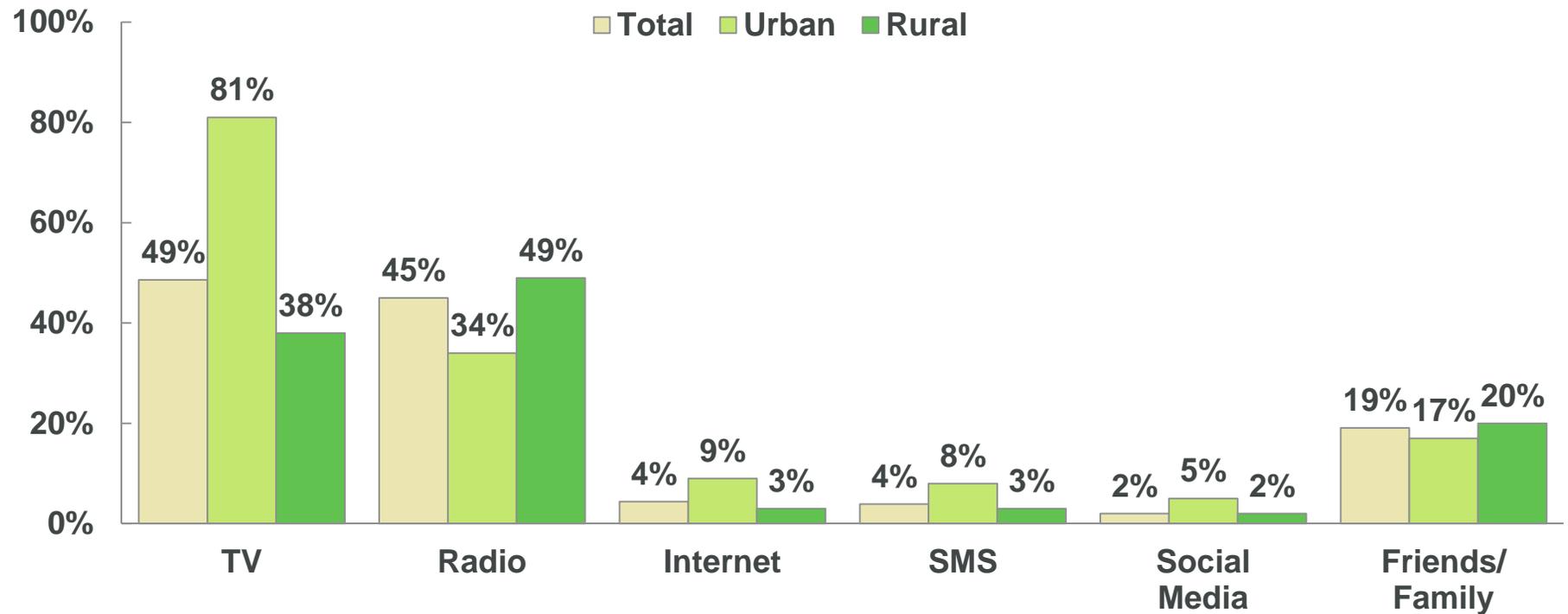
Media Use for News by Gender

For each one of the sources I mention, please tell me how often you use that source to get news. (% who use the source “daily or most days”)



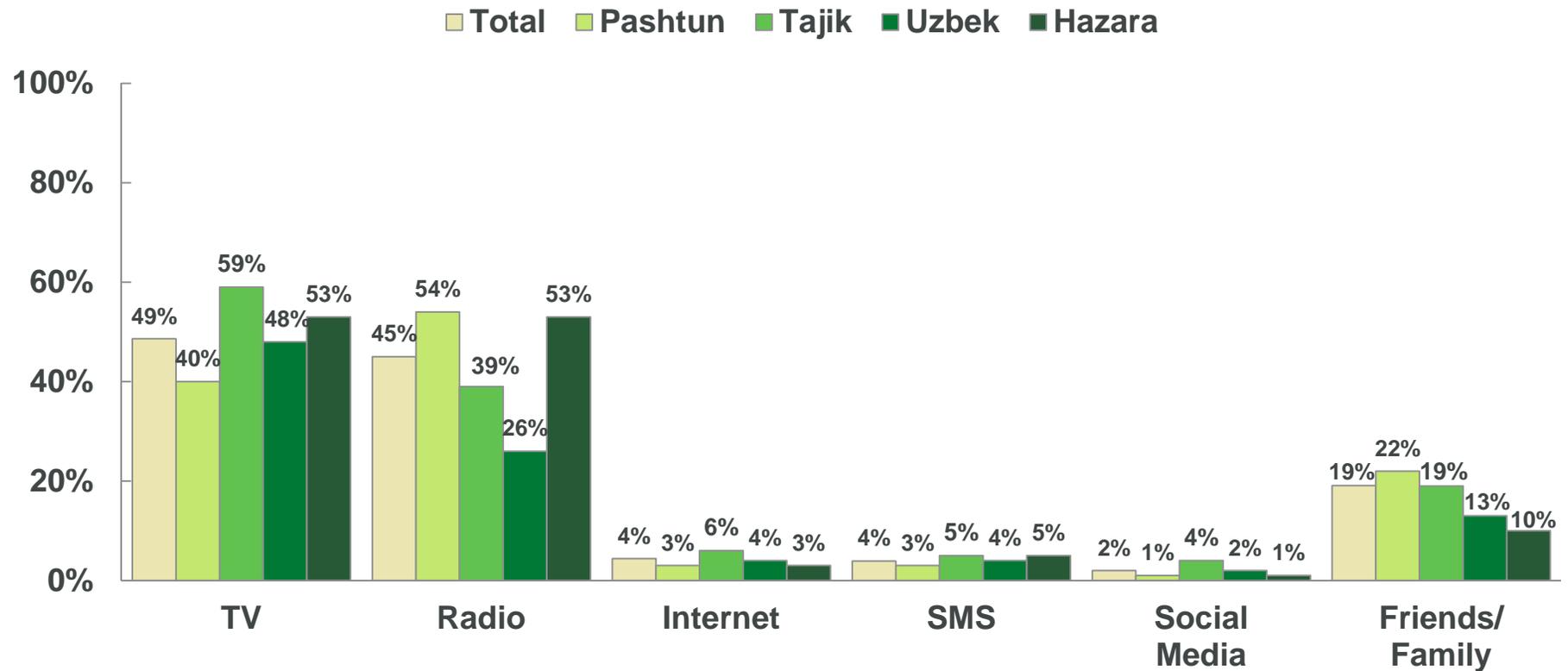
Media Use for News by Urbanicity

For each one of the sources I mention, please tell me how often you use that source to get news. (% who use the source “daily or most days”)



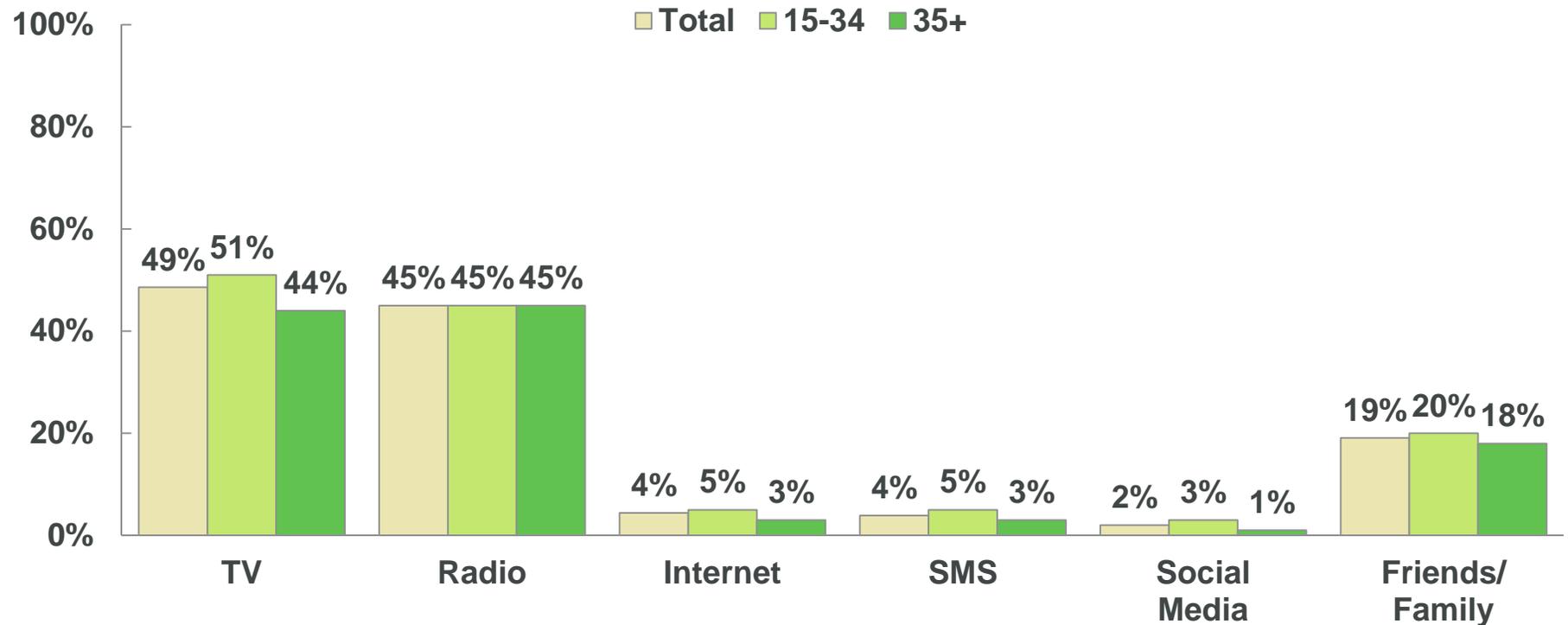
Media Use for News by Ethnic Group

For each one of the sources I mention, please tell me how often you use that source to get news. (% who use the source “daily or most days”)



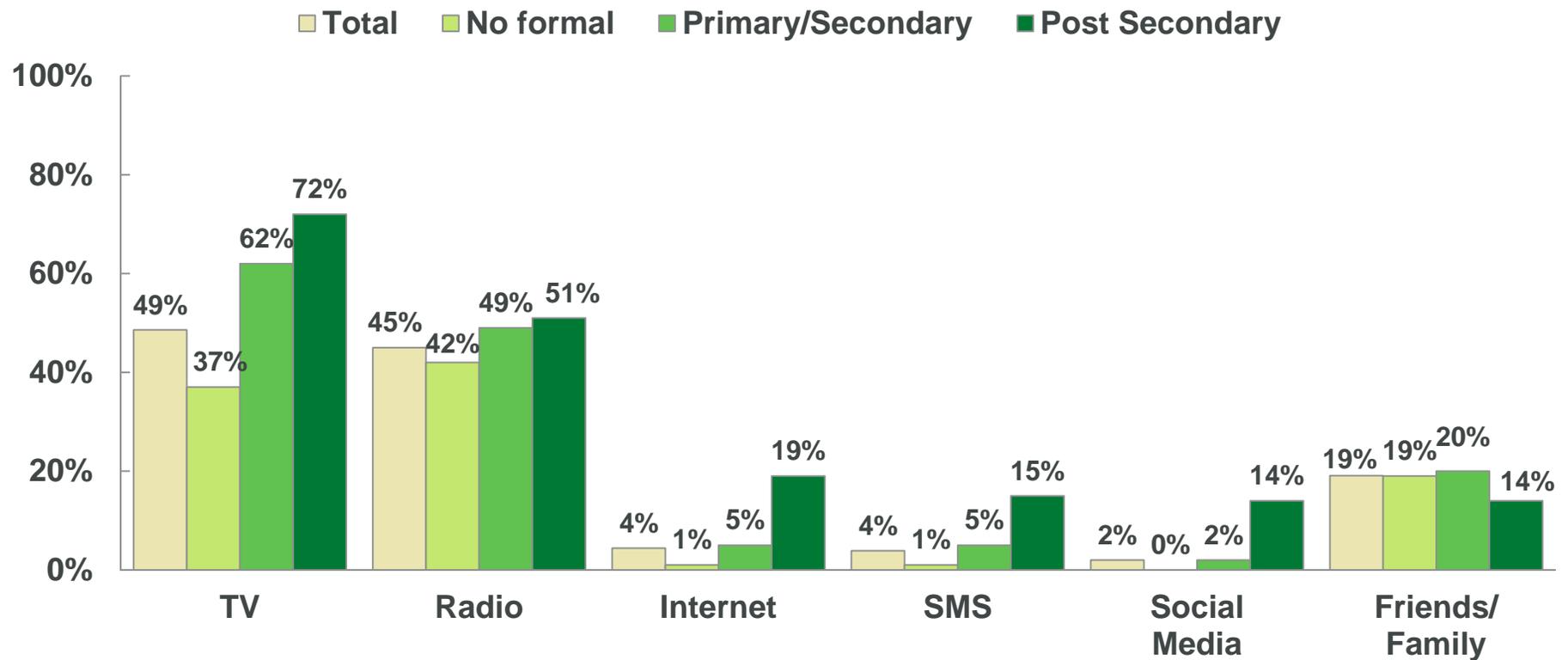
Media Use for News by Age

For each one of the sources I mention, please tell me how often you use that source to get news. (% who use the source “daily or most days”)



Media Use for News by Education

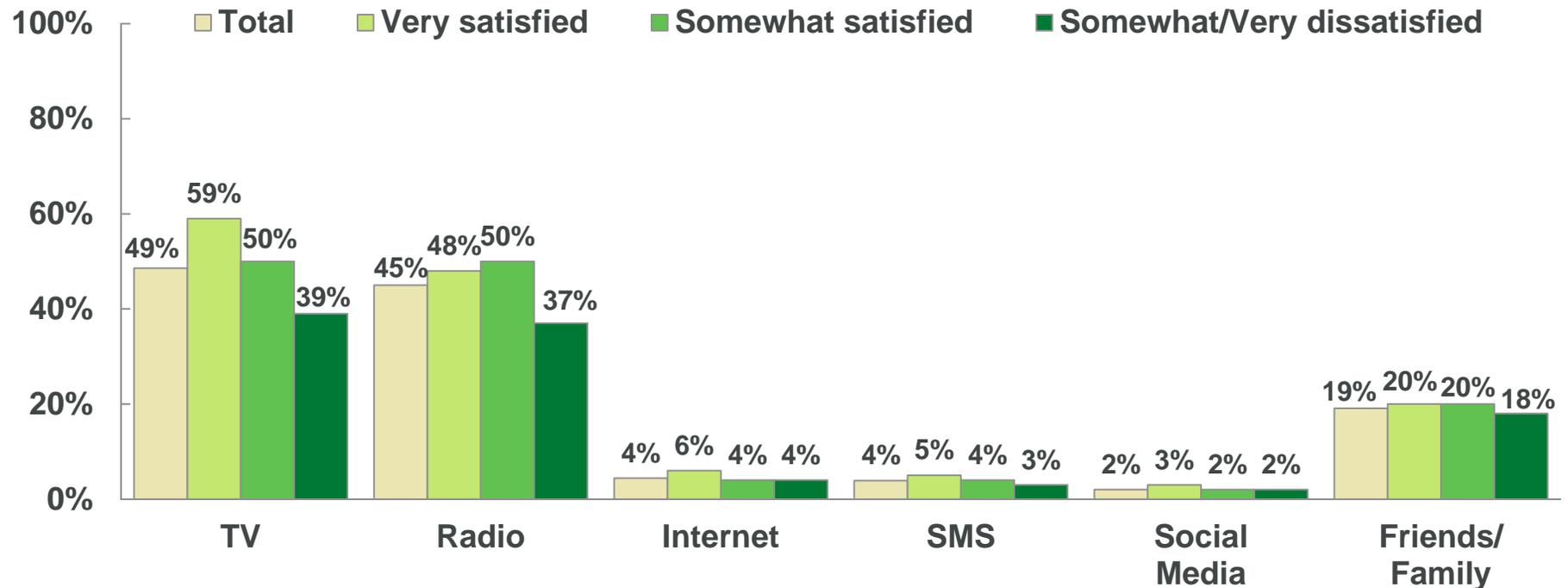
For each one of the sources I mention, please tell me how often you use that source to get news. (% who use the source “daily or most days”)



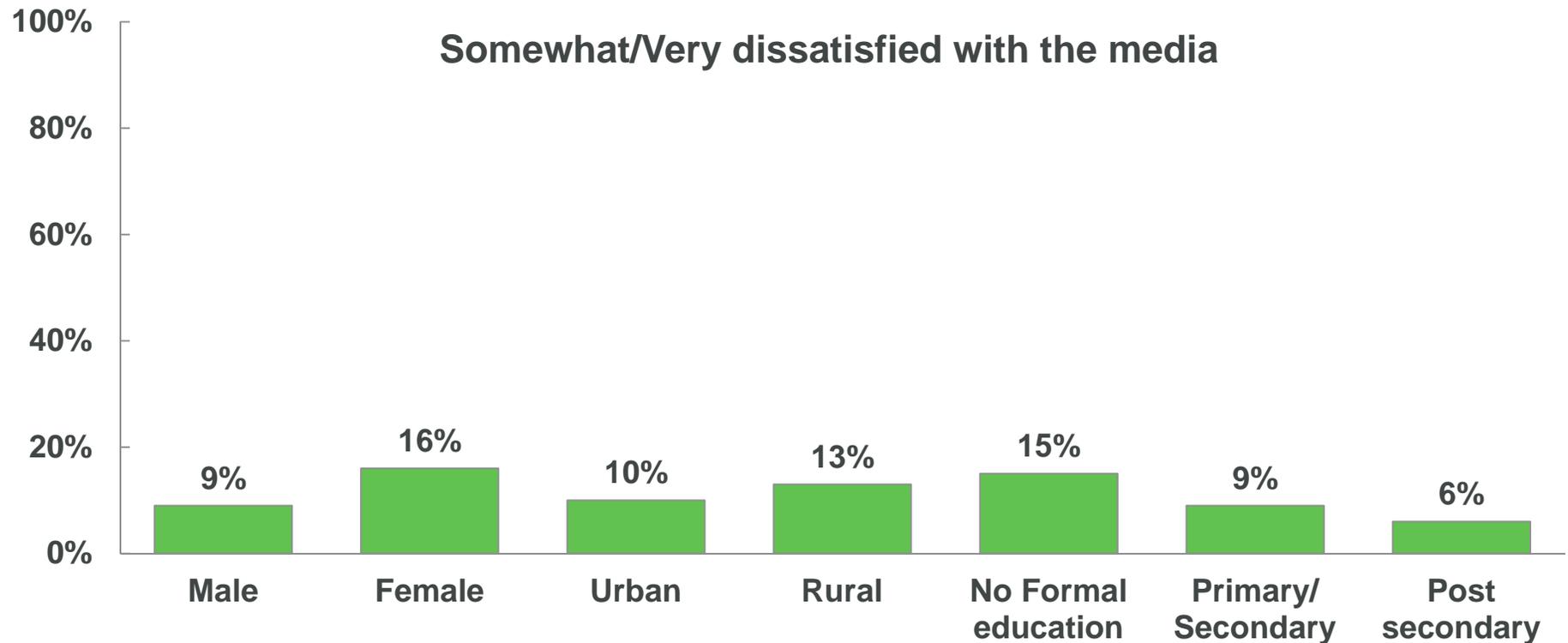
Media Use for News by Satisfaction With Media

For each one of the sources I mention, please tell me how often you use that source to get news. (% who use the source “daily or most days”)

How satisfied are you with the information provided by the media?

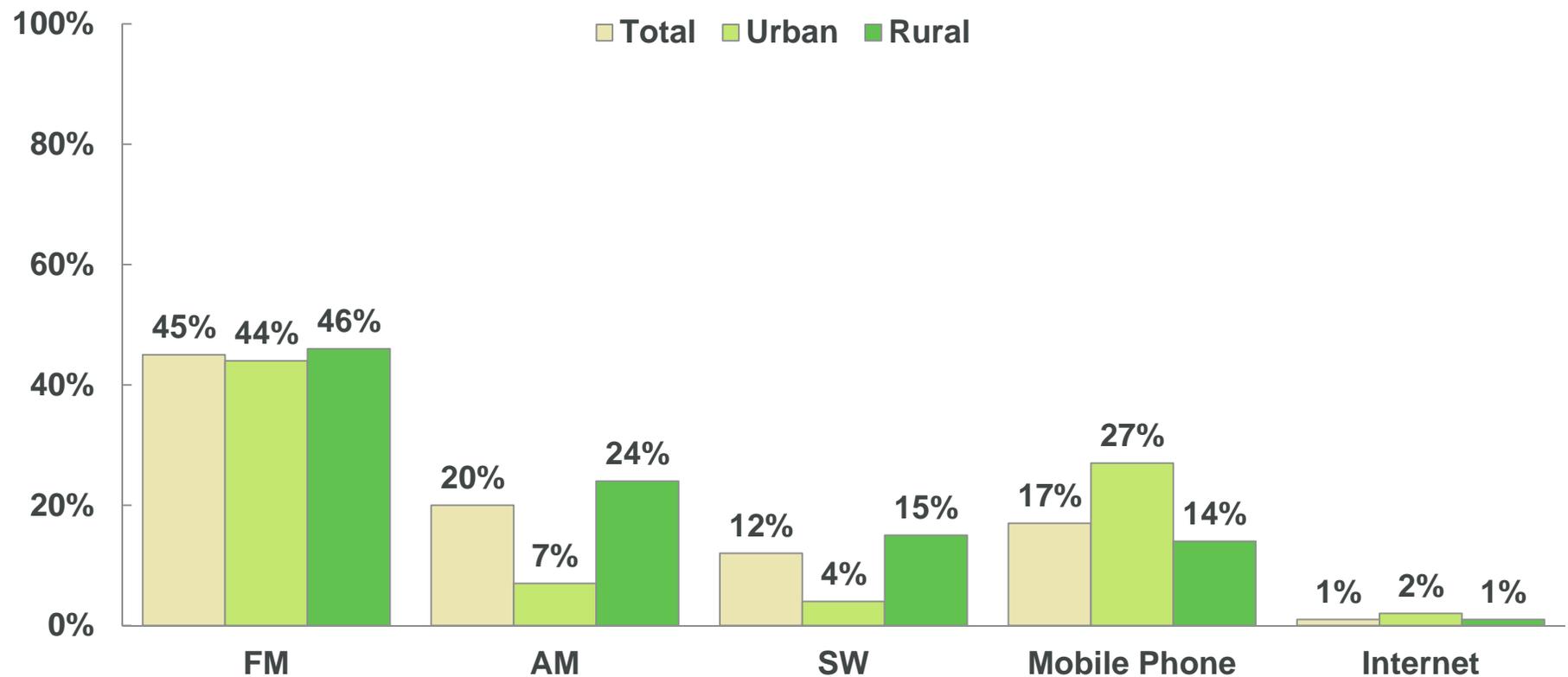


Demographics and Media Dissatisfaction

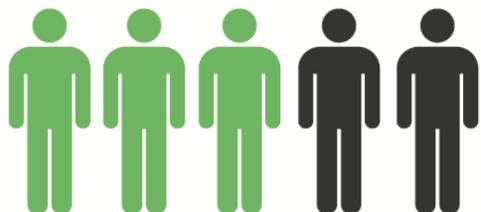


Radio Use

In the last week, have you used any of the following wavebands or methods to listen to the radio at home or elsewhere, or aren't you sure?



Mobile Use



62% of Afghan adults personally own a mobile phone.



14% of Afghan mobile phone owners say they have a smartphone.



35% of Afghan mobile phone owners say they sent or received an SMS in the past week.



8% of Afghan mobile phone owners say they accessed the Internet on a mobile phone in the past week.

Internet Use



9% of Afghan adults accessed the Internet in the past week.

75% of Internet users have access at home



57% of Internet users mostly use a desktop or laptop to access the Internet



40% of Internet users use a mobile or tablet device to access the Internet

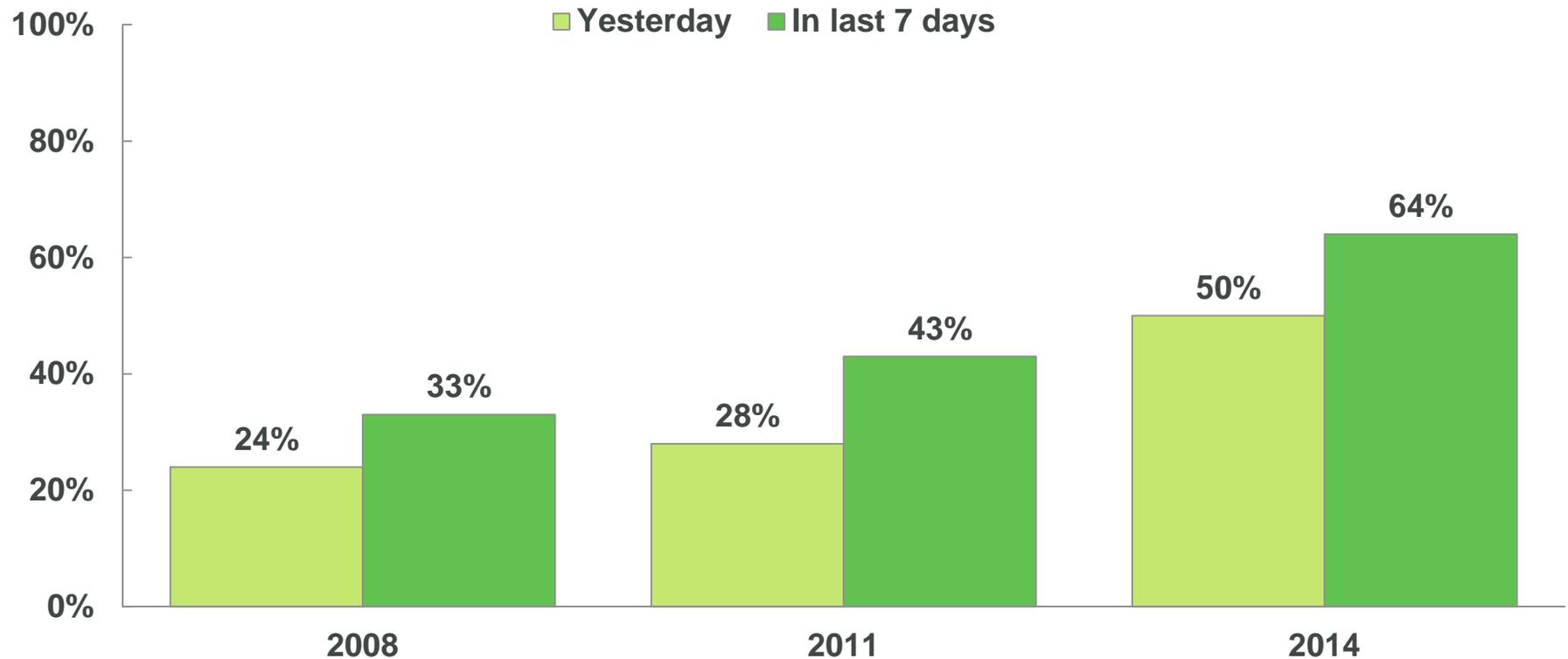




Afghanistan: The Rise of TV

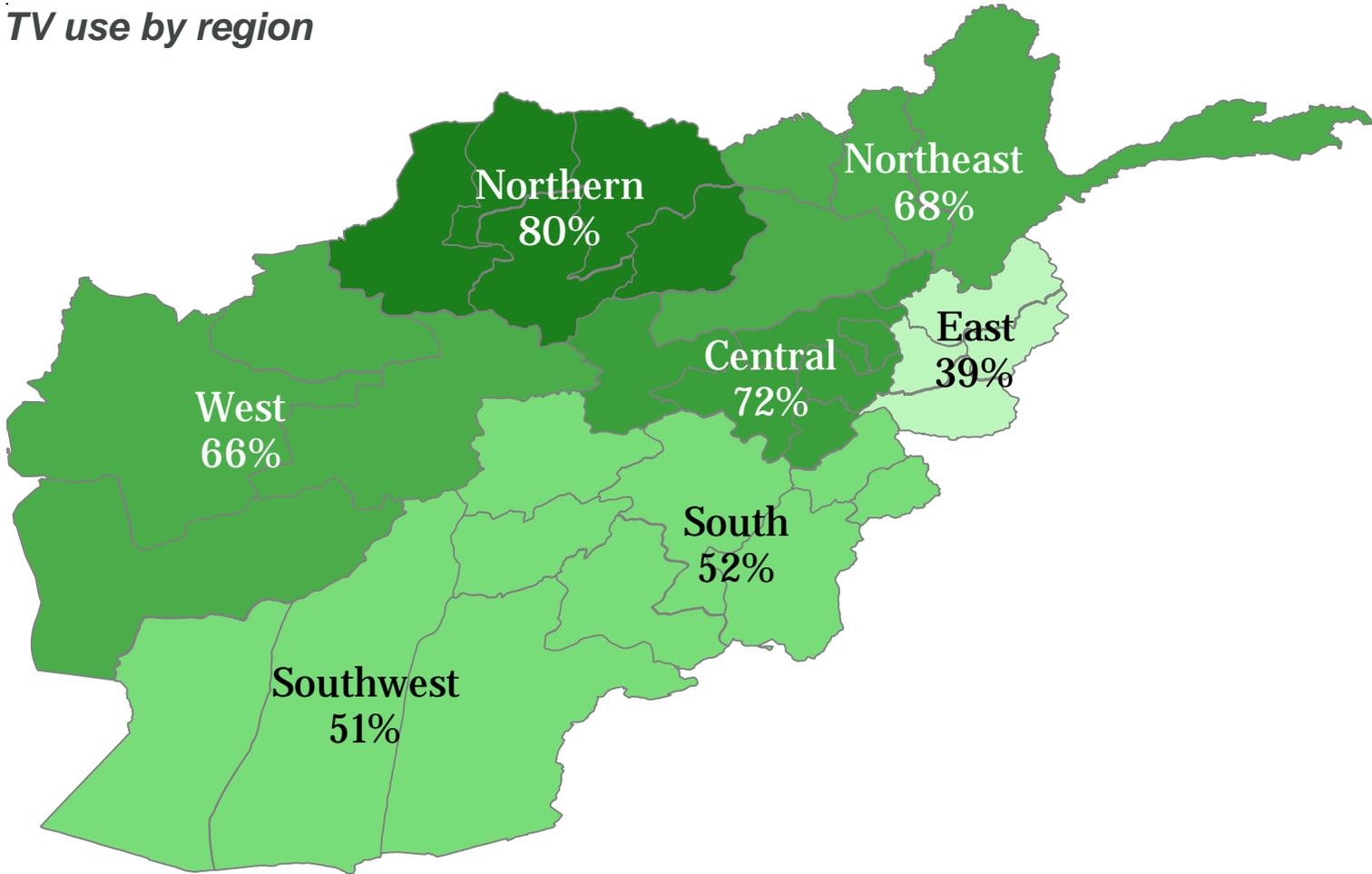
TV Has Grown Quickly in Afghanistan

When was the last time you watched television?



Weekly TV use is highest in the North, lowest in the East

Weekly TV use by region



Who is Most Likely to be a Regular TV Viewer?



Youth slightly more likely to watch TV

67% of 15-24 watch weekly, but so do 62% of those 55+

72% of non-Pashtuns watch TV weekly
Compared to 54% of Pashtuns



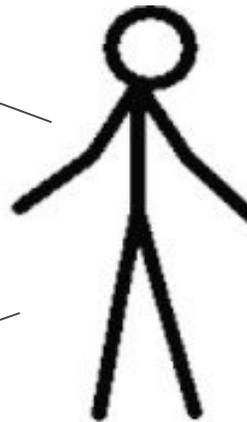
92% in Urban areas watch TV weekly

Compared to 55% in rural areas



TV viewing increases with education levels

88% of those with vocational training or higher view weekly



Weekly TV viewer
64% of the total population

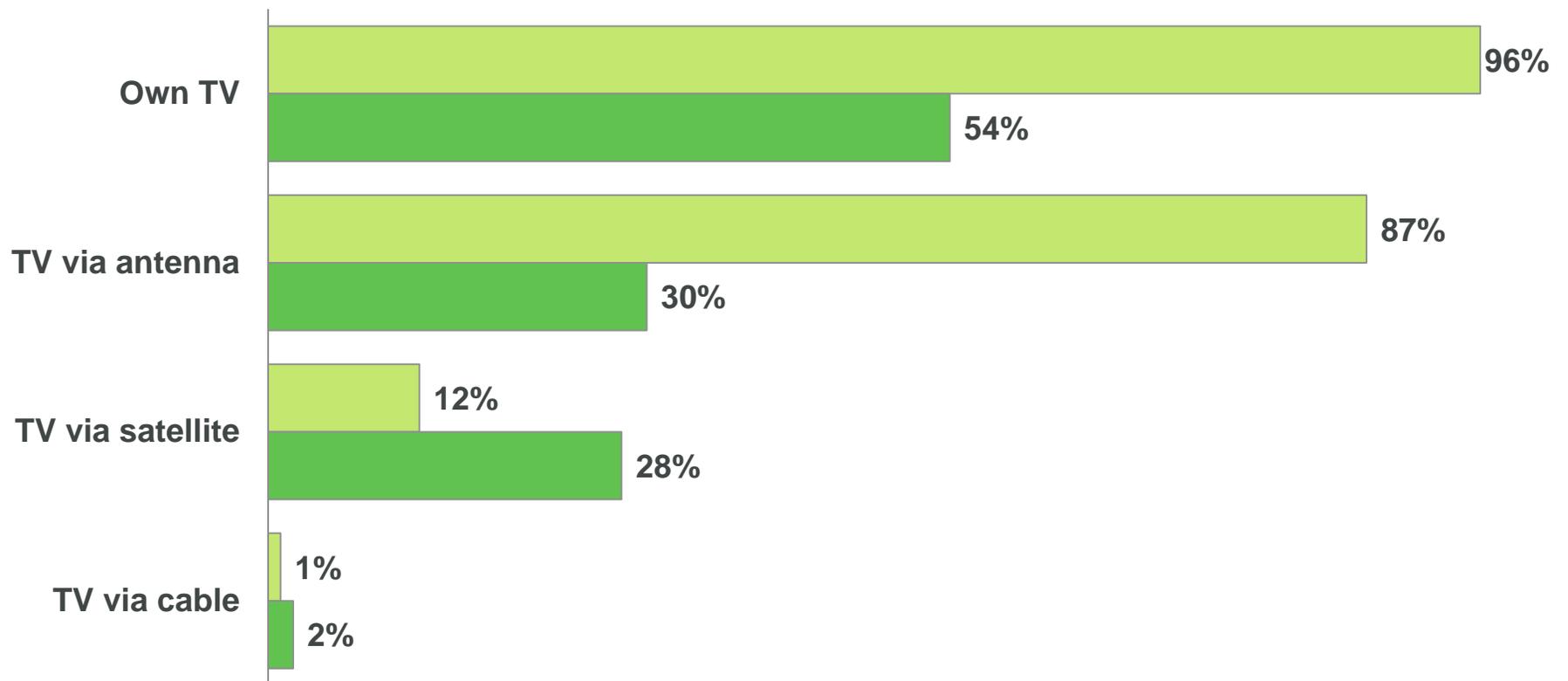


Males: 68% weekly
Females: 59% weekly

TV Ownership is Higher in Urban Areas, but Satellite Ownership is More Common in Rural Areas

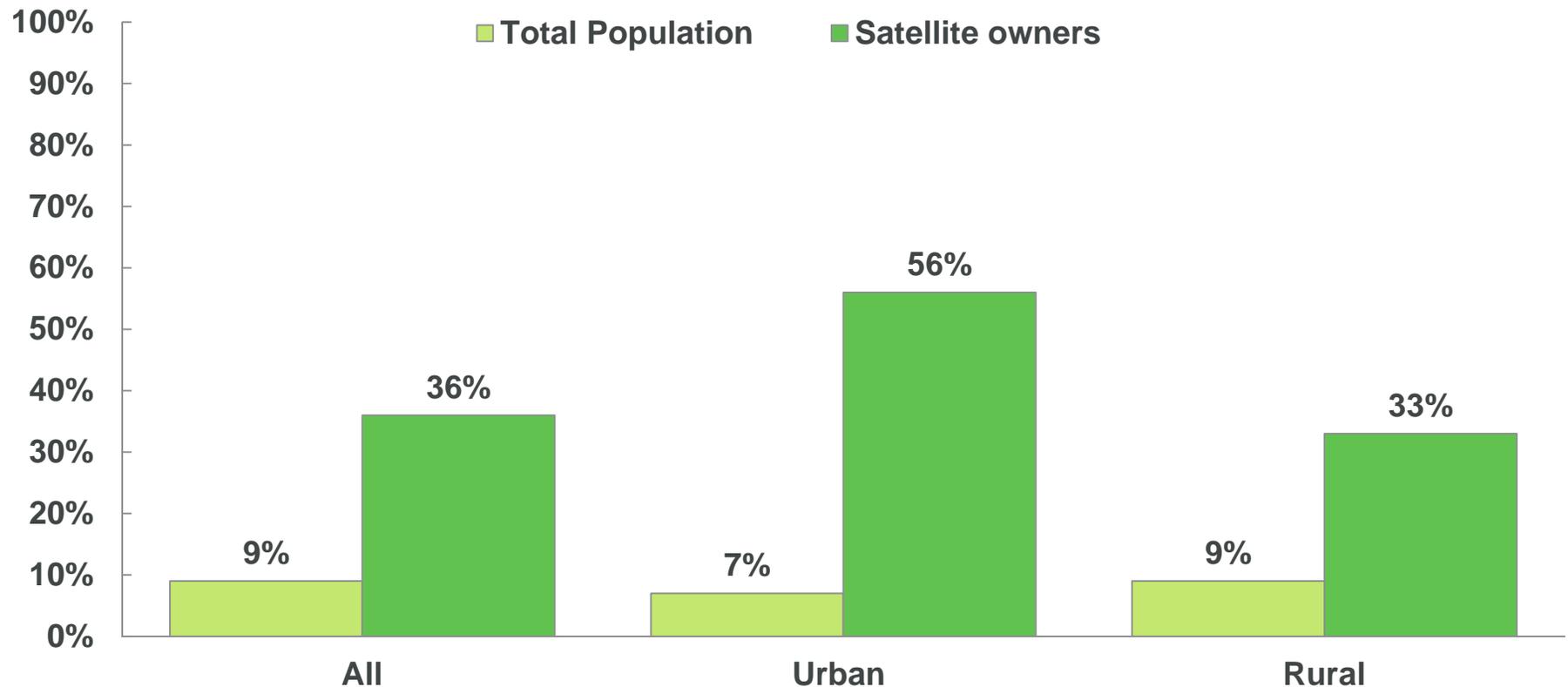
Ownership of TV and method of listening

Urban Rural



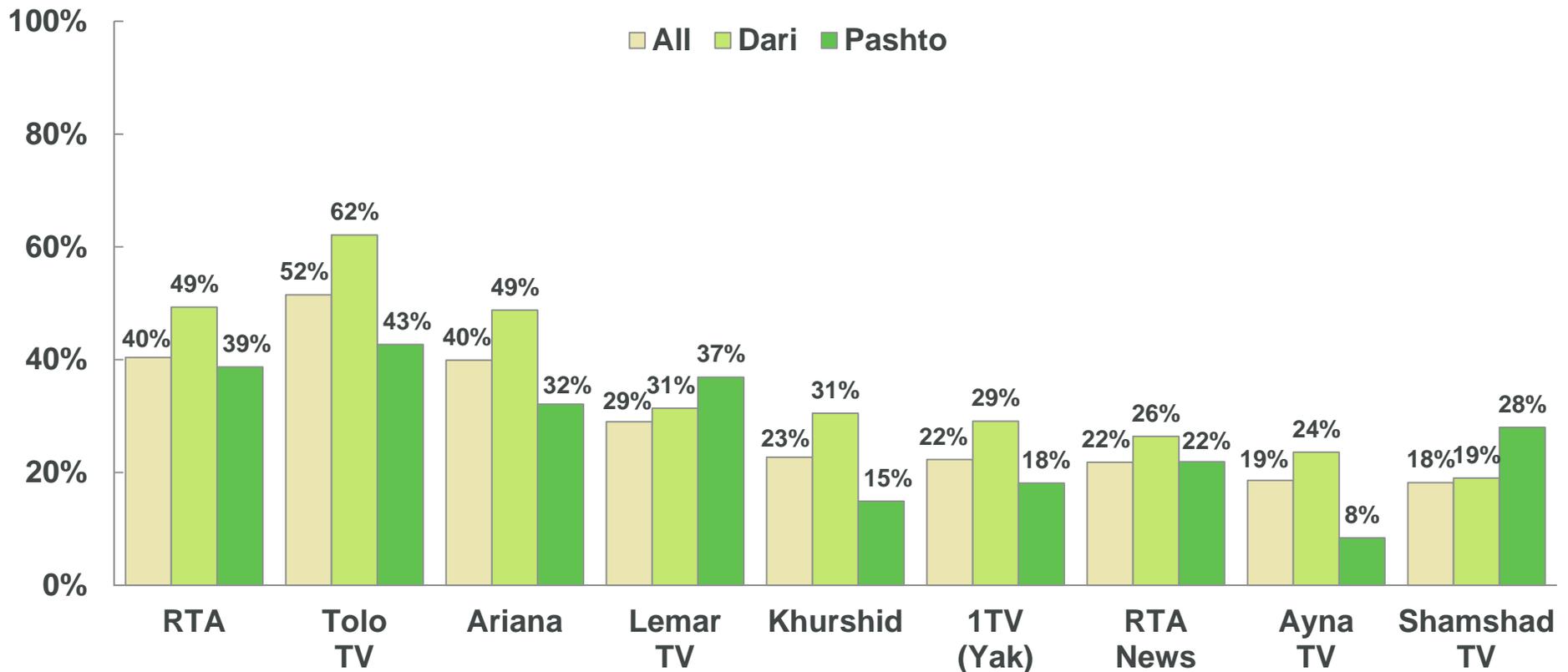
Urban Satellite Owners More Likely to Watch International Channels

Use satellite dish to watch programs from TV stations in other countries



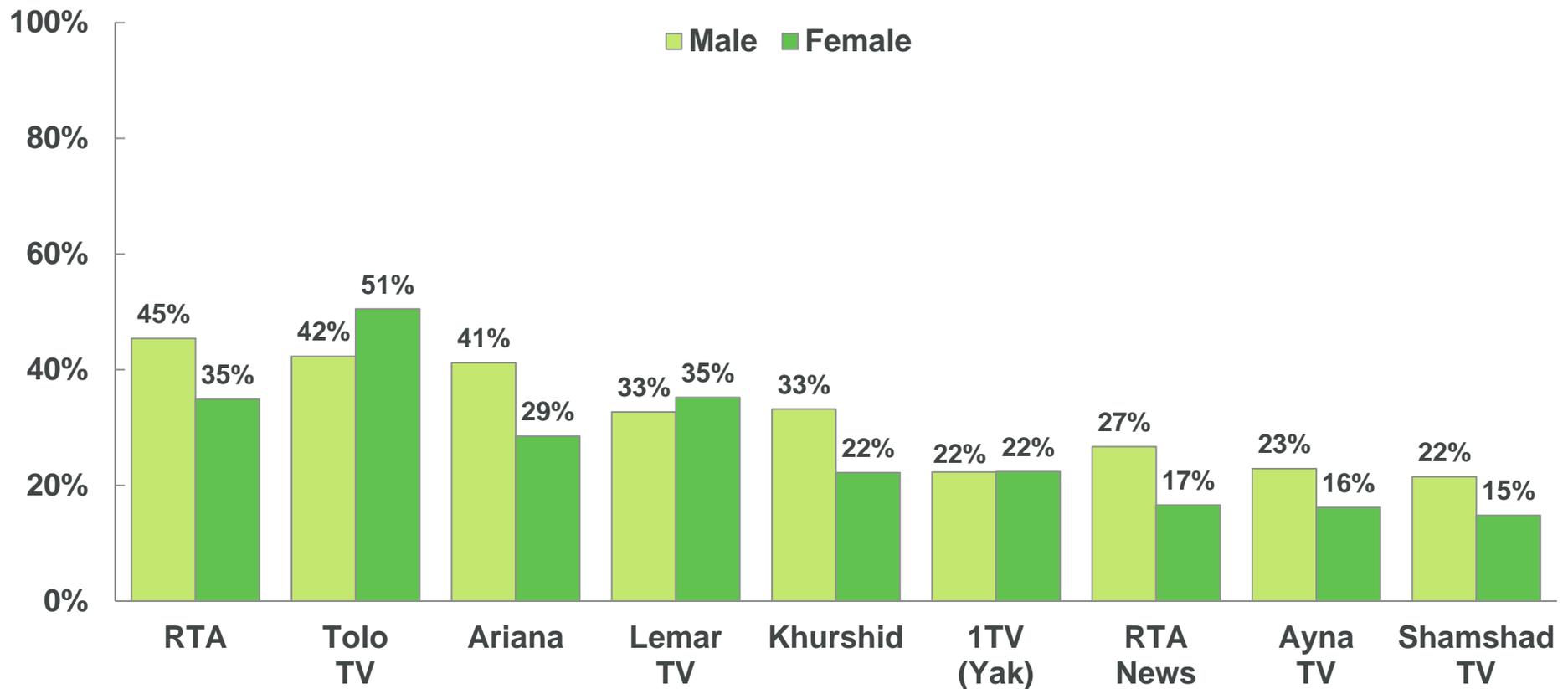
Afghans Have a Variety of TV Channels to Choose From

When was the last time you watched this channel or any program made by this channel?



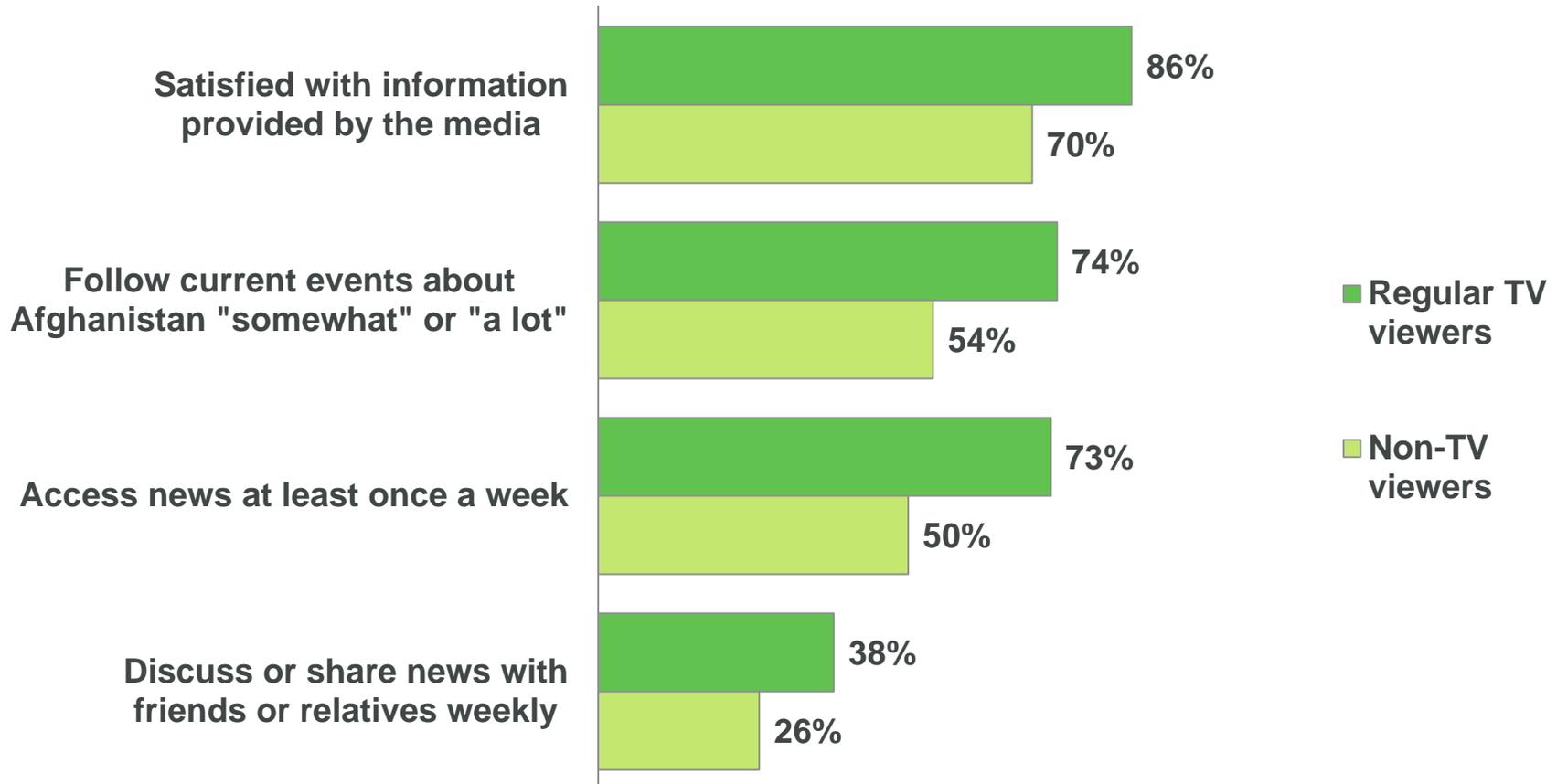
Tolo TV Strongest Among Women, Other Top Stations Reach More Men

When was the last time you watched this channel or any program made by this channel?



Regular TV Viewers Are More Likely to be Satisfied With News and Share It

Habits of regular TV users versus non-regular TV users



Key Takeaways

- Afghanistan had the highest rate of suffering in the world for 2013 and 2014.
- Those with a post-secondary education are the most avid media users for news overall. Highly educated Afghans were more likely to use TV, radio, Internet, SMS, and social media on a daily basis for news than other segments of the population.
- Radio remains important but TV is the most popular platform and new media is still nascent.
- TV is dominant in the North due to availability of electricity.