

IRANPOLL

Unveiling Iran

Attitudes on Economy and Enterprise in Post-Sanctions Iran

Survey Data

Commissioned and published in partnership with:

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Introduction

IranPoll is a Toronto based independent public opinion research and consultancy firm that exclusively focuses on demystifying people's opinion and behavior in complex societies and difficult contexts. It is directed by Dr. Amir Farmanesh, an Iranian/Canadian scholar, with a doctoral degree from University of Maryland School of Public Policy.

IranPoll relies on its vast survey capacity to conduct and collect polling data from complex societies using various modes of data collection including face to face, telephone polling (including a monthly Omnibus), in-depth interviews, focus groups, and online panel (B2B and 46k-member B2C). It operates multiple call centers with 87 active calling stations, and conducts over 150,000 interviews per year. Building on the in-depth local knowledge of its team of experts, IranPoll solely relies on methods that could be objectively verified and independently replicated.

Since its inception, IranPoll has provided public opinion and survey research services to clients from all over the world, including several major institutions of higher learning, including the University of Maryland, Princeton University, Cornell University, and Ohio State University, as well as research companies such as Gallup, IPSOS, Kantar, Qualtrics, YouGov, and GfK.



The results of the surveys conducted by IranPoll has also received extensive global coverage by major institutions, think-tanks, and media outlets, including the United States Institute of Peace, the Brookings Institution, the Atlantic Council, the Wilson Center, the Munich Security Conference, the Middle East Institute, the Carnegie Endowment, as well as media outlets, including the Wall Street Journal, New York Times, Washington Post, the Guardian, Reuters, Associated Press (AP), Bloomberg, USA Today, Los Angeles Times, Foreign Policy magazine, Haaretz (הארץ), and British Broadcasting Corporation (BBC).

Complementing its extensive field capacity, People Analytics is the developer of VoxNations and VoxIran, which is to date the single most comprehensive databank of Iranian opinion polls containing more than 3,300 diverse questions on 430 topics and subtopics from more than 350 probability sample surveys conducted from 2006 to 2017 in Iran.

IranPoll is a member of ESOMAR, AAPOR, MRIA, and WAPOR and follows their industry standards.

Methodology

The study presented here is based on a telephone poll conducted from August 1 to September 1, 2017, among a representative urban sample of 700 Iranians. The margin of error is about +/- 3.7%. The samples were RDD samples drawn from all landline telephones in Iranian cities. The samples were stratified first by Iranian provinces and then in accordance to city size. All 31 Iranian provinces were represented in proportions to their actual urban populations.

When a residence was reached, an adult was randomly selected from within that household using the random table technique. An initial attempt and three callbacks were made in an effort to complete an interview with the randomly selected respondents.

The contact rate, defined as the proportion of random respondents who were reached and ultimately agreed to be interviewed relative to the number of respondents attempted, was 82%. The completion rate was 78%.

All the interviews were conducted using computer-assisted telephone interview (CATI). All interviews were monitored in real-time by call-center supervisors.

For more details on IranPoll's methodology please refer to: <https://www.iranpoll.com/method>

Survey Results

Q1. Please tell me how often do you:

Sept. 2017	Almost everyday	A few times a week	At least once a week	Less than once a week	Never	DK/NA [vol]
a. Watch domestic TV	68.9	19.3	5.4	1.9	4.4	0.1
b. Watch satellite TV	22.0	8.9	4.1	3.9	61.0	0.1
c. Listen to domestic radio broadcasts	17.9	14.1	9.0	7.4	51.3	0.3
d. Listen to foreign radio broadcasts	0.9	1.3	1.3	1.9	94.1	0.6
e. Use the internet	64.1	8.4	2.9	2.6	22.0	-
f. Use Telegram	61.6	7.9	1.4	1.0	28.1	-
g. Use Instagram	21.4	10.6	4.4	7.0	56.3	0.3
h. Read newspaper	12.9	12.4	9.0	18.6	47.1	-
i. Read magazine	3.9	7.7	12.0	20.6	55.7	0.1

Q2. For each of the following global problems, please tell me if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

Sept. 2017	Very serious	Somewhat serious	Not very serious	Not at all serious	DK/NA [vol.]
a. Human right abuses in the world	61.9	31.4	2.6	2.0	2.1
b. The spread of human diseases	46.6	41.9	8.4	1.4	1.7
c. Extreme poverty in the world	66.9	26.7	3.0	1.4	2.0
d. Terrorism	67.1	24.1	3.4	1.4	3.9
e. The migration of people between countries	28.7	44.3	16.4	5.3	5.3
f. War and armed conflicts	59.7	29.6	6.6	2.0	2.1
g. The state of global economy	45.1	36.9	10	1.1	6.9
h. Religious extremism	45.1	35.4	9.4	3.1	6.9
i. Corruption	65.0	24.9	5.3	1.0	3.9
j. The gap between the rich and poor	76.3	19.7	3.1	0.4	0.4
k. Pollution and environmental problems in the world	65.3	28.3	4.0	0.6	1.9

Q3. With which of these statements about the environment and the economy do you most agree?

	Sept. 2017
Protecting the environment should be given priority, even if the economy suffers to some extent	58.0
Economic growth should be given priority, even if the environment suffers to some extent	33.3
Both should be given equal priority [vol]	8.3
DK/NA[vol]	0.4

Q4. As you may know, there are both positive and negative impacts from the increasing globalization occurring in the world. By globalization, I mean the increased trade between countries in goods, services, and investment. Thinking of you and your family's interests, do you think the overall effect of globalization is very positive, somewhat positive, somewhat negative, or very negative?

	Sept. 2017
Very positive	22.9
Somewhat positive	39.6
Somewhat negative	18.6
Very negative	14.4
Neutral/neither positive or negative [vol]	0.1
Both positive and negative [vol]	0.1
Never heard of the term globalization [vol]	-
DK/NA[vol]	4.3

Q5. As I read you some statements, please tell me the degree to which you agree or disagree with each:

Sept. 2017	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	DK/NA [vol.]
a. Most Iranian companies strive to create more jobs in Iran	24.1	36.7	21.9	15.1	2.1
b. Most Iranian companies are careful not to harm the environment	19.6	35.3	20.7	22.3	2.1
c. Most Iranian companies are careful not to endanger the health and safety of people	20.1	39.0	22.0	17.3	1.6
d. Most Iranian companies strive to make their employees more skilled	27.4	41.1	17.4	11.3	2.7
e. Most Iranian companies are able to compete in the global economy	29.1	39.9	18.1	11.0	1.9
f. Most Iranian companies are investing a lot more in making their employees more skilled as compared to 5 years ago	18.6	40.4	21.1	13.1	6.7
g. Iranian companies are creating a lot more jobs as compared to 5 years ago	13.3	31.7	28.9	23.6	2.6
h. Iranian companies are investing a lot more in making their companies more technologically advanced as compared to 5 years ago	28.1	45.6	12.9	7.9	5.6
i. When making a decision, Iranian business leader do take public interest account.	13.6	33.9	25.4	24.9	2.3
j. The government should place a minimum requirement on Iranian companies to provide their workforce with training and education to improve their skills	72.1	22.0	2.7	3.0	0.1

Q6. Now assume that you were seeking a job and an **Iranian** company was offering you a job. Please tell me how important each of the following would be to you as you think about accepting or rejecting the offer using a 0 to 10 scale with, with zero meaning that the factor would not be important at all and 10 meaning that the factor would be very important to your decision.

Sept. 2017	0 Not at all important	1-4	5	6-9	10 Very important	Mean	Median	DK/NA [vol.]
a. Salary	0.1	0.8	3.4	31.4	63.9	9.1	10.0	0.3
b. Various financial benefits besides the salary	0.6	2.5	7.3	45.2	44.4	8.4	9.0	-
c. the amount of training and education the company provides	0.9	1.3	5.6	36.5	55.3	8.8	10.0	0.4
d. Ability to develop one's career in the company	0.4	0.7	4.1	31.4	62.9	9.1	10.0	0.4
e. Job security	0.6	1.3	0.9	11.4	85.9	9.6	10.0	0.1
f. Work hours	1.0	1.5	6.3	40.2	50.7	8.6	10.0	0.4
g. The reputation of the company	0.6	1.2	4.3	25.1	68.7	9.1	10.0	0.1
h. How the company treats its customers	0.9	0.5	3.1	25.3	69.9	9.2	10.0	0.3
i. The degree to which the company is careful not to harm the environment	0.7	1.5	5.4	26.4	65.9	9.0	10.0	-
j. The degree to which the company is careful not to endanger the health and safety of people	0.7	1.1	2.7	19.1	76.4	9.3	10.0	-

Q7. How many jobs do you think Iranian companies will create within the next one year?

	Sept. 2017
A lot	6.6
Somewhat	42.9
Very few	32.0
Close to nothing	16.3
DK/NA[vol]	2.3

Q7.1. Generally speaking, would you say that this country's economy is currently run by a few big influential people and organizations who are looking out for themselves only or that it is run for the benefit of all the people?

	Sept. 2017
Run by a few big interests	57.0
Run for all the people	38.0
DK/NA[vol]	5.0

Q8. As you may know, in July 2015, Iran and the P5+1 countries reached a comprehensive agreement in regard to Iran's nuclear program, which is also known as the JCPOA. In general and based on what you know about the JCPOA, to what degree do you approve or disapprove of this agreement? Do you:

	Sept. 2017
Strongly approve	27.0
Somewhat approve	34.7
Somewhat disapprove	13.6
Strongly disapprove	18.6
DK/NA[vol]	6.1

Q9. How confident are you that the United States will live up to its obligations under the agreement?

	Sept. 2017
Very confident	2.1
Somewhat confident	18.7
Not very confident	31.6
Not confident at all	45.1
DK/NA[vol]	2.4

Q10. How confident are you that European countries will live up to their obligations under the agreement?

	Sept. 2017
Very confident	7.7
Somewhat confident	49.3
Not very confident	21.0
Not confident at all	19.0
DK/NA[vol]	3.0

Q11. Since the deal was signed in two years ago in 2015, do you think each of the following have improved, worsen, or have remained unchanged?

Sept. 2017	Improved	Worsen	Remained unchanged	DK/NA [vol.]
a. Iran's relations with the United States	12.0	55.7	28.4	3.9
b. Iran's relations with European countries	58.7	7.9	27.4	6.0
c. Iran's reputation and image in the world	62.9	8.7	23.1	5.3
d. Reputation and image of Europe in Iran	44.6	12.7	35.7	7.0
e. Reputation and image of the United States in Iran	5.6	61.4	29.7	3.3

Q12. Since the deal was signed in two years ago in 2015, do you think each of the following have increased, decreased, or have remained unchanged?

Sept. 2017	Increased	Decreased	Remained unchanged	DK/NA [vol.]
a. Availability of goods made by multinational companies in Iran	42.6	15.0	36.9	5.6
b. Jobs created by multinational companies in Iran	13.6	13.7	57.0	15.7
c. Jobs created by Iranian companies in Iran	22.6	32.6	38.0	6.9
d. Amount of investment made by multinational companies in Iran	30.7	11.9	42.6	14.9

Q13. Are multinational companies moving as rapidly as they can to trade and invest with Iran now that some sanctions have been lifted, or are they moving slower than they could?

	Sept. 2017
They are moving as rapid as they can [skip Q14]	17.6
They are moving slower than they could	70.0
None of the above/ other [vol.] [skip Q14]	1.7
DK/NA[vol]	10.7

[Q14 was only asked from those who say multinational companies are moving slower than they could to invest in Iran in Q13]

Q14. In your opinion, are multinational companies are moving slower than they could to trade and invest with Iran mostly because of:

	Sept. 2017
Iran's own weak business environment	15.7
Pressure or fear of the United States	76.7
None of the above/ other [vol.]	4.9
DK/NA[vol]	2.7

Q15. Now I will read you some statements. Please tell me the degree to which you agree or disagree with each:

Sept. 2017	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	DK/NA [vol.]
a. Most multinational companies strive to create more jobs in Iran	16.1	28.3	26.0	23.7	5.9
b. Most multinational companies are careful not to harm the environment	26.0	41.0	18.1	10.0	4.9
c. Most multinational companies are careful not endanger the health and safety of people	25.4	43.0	17.3	8.9	5.4
d. Most multinational companies strive to make their employee more skilled	42.0	43.1	7.1	2.6	5.1
e. Most multinational companies are interested to invest in Iran	18.3	35.4	22.4	19.1	4.7
f. Iran would mostly benefit from allowing multinational companies to freely compete with Iranian companies	25.6	34.1	17.9	16.0	6.4
g. Most multinational companies are investing a lot more in making their employees more skilled as compared to 5 years ago	28.3	49.7	11.3	3.3	7.4
h. Multinational companies are creating a lot more jobs in Iran as compared to 5 years ago	9.6	33.6	27.7	21.0	8.1
i. Multinational companies are investing a lot more in making their companies more technologically advanced as compared to 5 years ago	40.9	39.1	8.3	6.4	5.3
j. Multinational companies operating inside Iran do transfer advanced	10.7	36.6	25.7	21.3	5.7

Sept. 2017	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	DK/NA [vol.]
technology and know-how to Iran					
k. Multinational companies operating inside Iran do take the interests of the Iranian people into account when making decisions.	10.1	23.7	25.4	36.3	4.4
l. Most multinational companies operating inside Iran respect the culture and values of the Iranian people	18.6	36.3	17.1	22.6	5.4
m. The government should place a minimum requirement on multinational companies operating in Iran to provide their workforce with training and education to improve their skills	45.0	38.1	7.3	6.9	2.7

Q16. Now I will read you some policies that our country could adopt. Please tell me the degree to which you would approve or oppose our country adopting each of these policies:

Sept. 2017	Strongly approve	Somewhat approve	Somewhat oppose	Strongly oppose	DK/NA [vol.]
a. Reducing tariffs on goods made by multinational companies	16.9	23.9	35.3	20.6	3.4
b. Making it easier for multinational banks to operate in Iran	50.3	35.9	7.6	3.7	2.6
c. Making it easier for multinational companies to invest in Iran	53.7	33.7	6.6	3.7	2.3
d. Insuring the investments that multinational companies make in Iran	31.6	26.9	15.4	23.0	3.1
e. Making it easier for heads of multinational companies to travel to Iran	49.1	39.6	6.6	2.9	1.9

Q17. Now I will read you the names of some countries. As I read the name of each, please tell me the degree to which you think it would be in Iran's interest for more companies from that country to invest and trade with Iran:

Sept. 2017	A lot	Somewhat	Only a little	Not at all	DK/NA [vol.]
a. United States	18.9	31.0	15.0	31.6	3.6
b. Russia	31.4	39.3	11.6	11.1	6.6
c. Germany	66.1	22.6	4.3	2.9	4.1
d. France	45.0	37.9	5.9	6.7	4.6
e. Italy	39.4	42.9	7.6	3.7	6.4
f. United Kingdom	21.6	30.3	17.0	27.4	3.7
g. Canada	30.4	40.9	12.3	10.0	6.4
h. Spain	24.6	46.4	12.4	6.3	10.3
i. Switzerland	43.7	37.6	6.4	5.0	7.3
j. China	19.1	45.9	13.1	18.6	3.3
k. South Korea	40.0	42.9	6.0	6.7	4.4
l. Japan	66.7	23.6	3.0	3.4	3.3
m. Turkey	18.1	48.6	16.4	12.7	4.1

Q18. Now I will read you the names of some countries. In general how good or bad is the quality of products produced in each of these countries. Is it:

Sept. 2017	Very good	Somewhat good	Somewhat bad	Very bad	DK/NA [vol.]
a. United States	44.0	35.9	4.6	5.7	9.9
b. Russia	13.4	54.7	10.0	5.7	16.1
c. Germany	68.7	26.4	0.9	0.7	3.3
d. France	40.3	46.4	2.1	0.9	10.3
e. Italy	30.4	50.6	3.7	1.0	14.3
f. United Kingdom	33.0	45.0	3.4	2.1	16.4
g. Canada	23.9	40.1	4.9	2.1	29.0
h. Spain	17.1	43.9	5.1	1.4	32.4
i. Switzerland	43.1	36.7	3.3	1.3	15.6
j. China	5.4	32.0	24.6	35.9	2.1
k. South Korea	26.3	59.9	3.4	2.9	7.6
l. Japan	61.6	32.0	2.4	1.1	2.9
m. Turkey	11.1	58.6	21.3	4.6	4.4
n. Iran	17.4	52.9	20.3	8.4	1.0

Q19. Now assume that you were seeking a job and a **multinational** company was offering you a job inside Iran. Please tell me how important each of the following would be to you as you think about accepting or rejecting the offer using a 0 to 10 scale with, with zero meaning that the factor would not be important at all and 10 meaning that the factor would be very important to your decision.

Sept. 2017	0 Not at all important	1-4	5	6-9	10 Very important	Mean	Median	DK/NA [vol.]
a. Salary	0.4	0.7	1.9	28.0	68.9	9.3	10.0	0.1
b. Various financial benefits besides the salary	0.7	1.4	2.7	41.5	53.4	8.9	10.0	0.1
c. the amount of training and education the company provides	0.4	0.4	3.3	30.1	65.6	9.2	10.0	0.1
d. Ability to develop one's career in the company	0.3	0.7	2.4	29.2	67.3	9.2	10.0	-
e. Job security	0.3	0.3	1.1	10.6	87.6	9.7	10.0	0.1
f. Work hours	1.4	0.8	3.0	36.4	58.3	8.9	10.0	-
g. The reputation of the company	0.4	0.7	1.1	16.6	81.0	9.5	10.0	0.1
h. How the company treats its customers	0.3	0.5	2.3	21.9	74.9	9.4	10.0	-
i. The degree to which the company is careful not to harm the environment	0.4	0.3	2.6	20.8	75.7	9.4	10.0	-
j. The degree to which the company is careful not to endanger the health and safety of people	0.7	0.7	1.1	13.2	84.1	9.6	10.0	0.1
k. The degree to which the company has invested in Iran	1.4	1.3	6.1	34.0	56.0	8.7	10.0	0.6
l. The degree to which the company respects the culture and values of the Iranian	0.7	0.6	1.7	15.8	80.7	9.4	10.0	-

Sept. 2017	0 Not at all important	1-4	5	6-9	10 Very important	Mean	Median	DK/NA [vol.]
people								

Q20. How many jobs do you think multinational companies will create in Iran within the next one year?

	Sept. 2017
A lot	7.1
Somewhat	39.0
Very few	33.9
Close to nothing	14.9
DK/NA[vol]	5.1

Q21. Which one of the following kinds of companies do you think can best help to improve economic conditions in Iran?

	Sept. 2017
Iranian State-Owned companies	31.4
Iranian private companies	41.0
Multinational companies	21.4
None/all equally	2.6
DK/NA[vol]	3.6

Q22. What do you think about the growing trade and business ties between Iran and other countries – do you think it is a very good thing, somewhat good, somewhat bad or a very bad thing for our country?

	Sept. 2017
Very Good	38.6
Somewhat good	46.0
Somewhat bad	7.4
Very bad	6.9
DK/NA[vol]	1.1

Q23. Does trade with other countries lead to an increase in the wages of Iranian workers, a decrease in wages, or does it not make a difference?

	Sept. 2017
Increase	40.4
Decrease	18.9
Does not make a difference	36.6
DK/NA[vol]	4.1

Q24. Does trade with other countries lead to job creation in Iran, job losses, or does it not make a difference?

	Sept. 2017
Job creation	51.1
Job loses	21.1
Does not make a difference	24.1
DK/NA[vol]	3.6

Q25. In your opinion, when foreign companies build new factories in Iran, does this have a very good, somewhat good, somewhat bad, or a very bad impact on our country?

	Sept. 2017
Very Good	39.6
Somewhat good	50.4
Somewhat bad	5.7
Very bad	3.1
DK/NA[vol]	1.1

Q26. When children today in Iran grow up, do you think they will be better off or worse off financially than their parents?

	Sept. 2017
Better off	56.6
Worse off	34.9
Same [vol]	3.0
DK/NA[vol]	5.6

Q27. Some people feel they have completely free choice and control over their lives, while other people feel that what they do has no real effect on what happens to them. Please use this scale where 1 means "none at all" and 10 means "a great deal" to indicate how much freedom of choice and control you feel you have over the way your life is going.

	Sept. 2017
No freedom of choice 1-2	6.1
3-4	3.2
5-6	21.6
7-8	39.2
A great deal of freedom of choice 9-10	31.8
Mean	7.4
Median	8.0
DK/NA [vol.]	0.3

Q28. Some people believe that individuals can decide their own destiny, while others think that it is impossible to escape a predetermined fate. Please tell me which comes closest to your view on this scale on which 1 means "everything in life is determined by fate," and 10 means that "people shape their fate themselves."

	Sept. 2017
Everything is Determined by fate 1-2	4.2
3-4	2.1
5-6	14.5
7-8	29.9
People shape their fate themselves 9-10	49.0
Mean	8.0
Median	8.0
DK/NA [vol.]	0.4

Q29. Some say most products in Iran's market that are said to be made in Europe are in reality counterfeits and lack European standards. Others disagree and say most such products are genuine and are identical in quality with products that are sold in Europe. What do you think?

	Percent
Most are counterfeits	54.8
Most are genuine	25.4

DK/NA [vol.]	19.8
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Q30. If you knew that a particular European producer has an official representative office in Iran, would that increase, decrease, or have no effect on your confidence in the quality of that producer's products that are sold in Iran's market?

	Percent
Increase	58.3
Decrease	2.8
Have no effect	34.0
DK/NA [vol.]	4.8

Q31. Some say that European producers do not have a good understanding of the needs and the taste of the Iranian people due to their prolonged absence from Iran's market. Others disagree and say European producers have a good understanding of the needs and the taste of the Iranian people. What do you think?

	Percent
European producers do not have a good understanding of the needs and the taste of the Iranian people	46.4
European producers do have a good understanding of the needs and the taste of the Iranian people	39.7
DK/NA [vol.]	13.8

VoxIran, the Voice of the Iranian People

Complementing its extensive field capacity, IranPoll is the developer of VoxIran, which is the single most comprehensive databank of Iranian opinion polls containing more than 3,300+ diverse questions on over 430 topics and subtopics from 330+ probability sample surveys conducted from 2006 to 2017 in Iran.

Through its exclusive access to VoxIran, IranPoll provides its clients with evidence-based consultancy on issues relating to Iran and the Iranian people. VoxIran enables clients to see where Iranian people stand and how their views and opinions have changed and evolved over the past decade on a comprehensive range of issues.

Through VoxIran, IranPoll provides its online panel clients with a unique ability to compare their panel results with previous probabilistic polls (telephone CATI or face-to-face) on similar topics, ensuring sampling accuracy and enhancing representativeness of results.

TOPICS covered in VOXIRAN:

1. Market & business:

- Iranians Brand Awareness, Attitude, and Usage (AAU)
- Views on **434 distinct brands** from across 15 major sectors

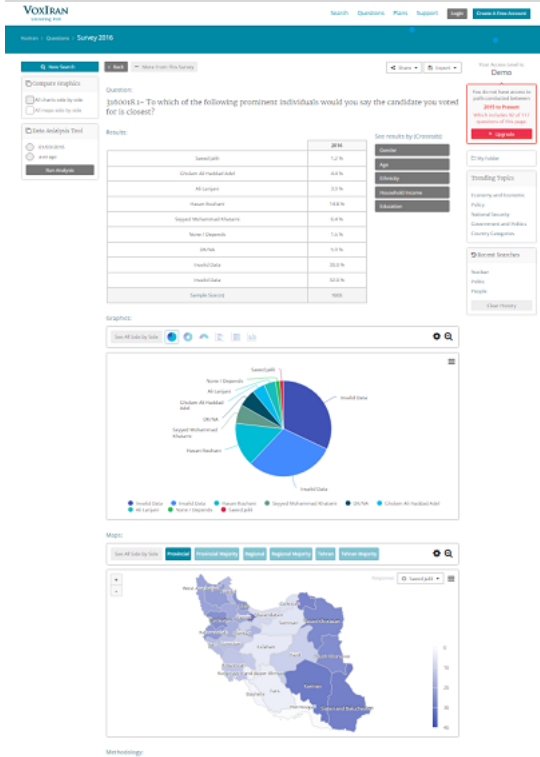
2. POLITICS:

- Elections in Iran (6 elections) and Other Countries
- Law and Order
- Government and Politics
- Foreign Affairs and Policy
- Sources of News and Information

3. SECURITY:

- Iran’s Nuclear Program
- National Security

4. PUBLIC FIGURES:



- Opinions on Iranian Public Figures (33 Individuals)
- Opinions on World Public Figures (32 Individuals)

5. OTHER COUNTRIES:

- Views and Opinions on Other Countries (31 countries)
- Views and Opinions on Groups of Countries

6. ECONOMICS:

- Economy and Economic Policy

7. SOCIAL:

- National and Cultural Identity
- Religion
- Family and Relationships
- Demographics

8. HUMAN RIGHTS:

- Human Rights and Democracy
- Women’s Issues
- Environmental issues
- Health and Health Care

9. SCIENCE AND INFORMATION TECHNOLOGY (IT):

- Science and Iran’s Scientific Capabilities
- Information Technology (IT)



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Bourse & Bazaar is the organizer of The Europe-Iran Forum, the annual gathering for business, government, and civil society leaders committed to Iran's responsible and robust economic development. The 4th Europe-Iran Forum takes place on October 3-4 in Zurich, Switzerland.

Learn more at: www.bourseandbazaar.com and www.europeiranforum4.com

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Unveiling Iran

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