The 2014 Arab Opinion Index: In Brief

- The 2014 Arab Opinion Index is the third annual survey of Arab public opinion carried out by the Arab Center for Research and Policy Studies. In 2011, the survey was carried out in 12 Arab countries, and relied on a total survey sample of 16,192 respondents who participated through face-to-face interviews. For the 2012/2013 survey, a sample size of 20,372 respondents across 14 countries was used to gather the results. The countries covered in this survey were: Yemen, Kuwait, Iraq, Egypt, Saudi Arabia, Jordan, Lebanon, Egypt, Sudan, Libya, Algeria, Tunisia, Morocco and Mauritania.

- The total sample size for the 2014 Arab Opinion Index was thus 26,618 respondents: these include 21,152 respondents in the 14 countries reported above, and a further 5,466 Syrian Refugees and Internally Displaced Persons. The Syrian Refugees were located across refugee camps and other population centers in Lebanon, Jordan and Turkey, while the Syrian IDPs were located along the Syrian-Turkish frontier. Sampling for each sample was done using a randomized, stratified, multi-stage, self-weighted clustered approach, and provided a margin of error of between 2% and 3% for each population group.
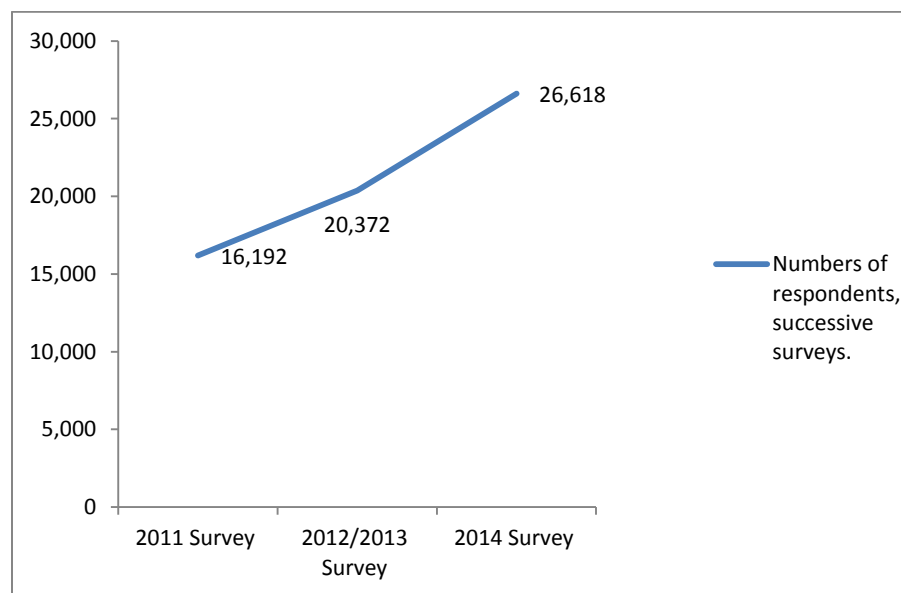

Figure 1- 1 Increasing numbers of respondents in successive surveys of the Arab Opinion Index since 2011.

Only 21% of the Arab public reported a household income which allows them to save, while 42% of respondents reported that their household income covers necessities, but does not allow them to save (these are families living in "hardship"). Another 32% of Arab households reported that they "live in need" (or are "needy"), with their income not covering all of their necessary expenditures.
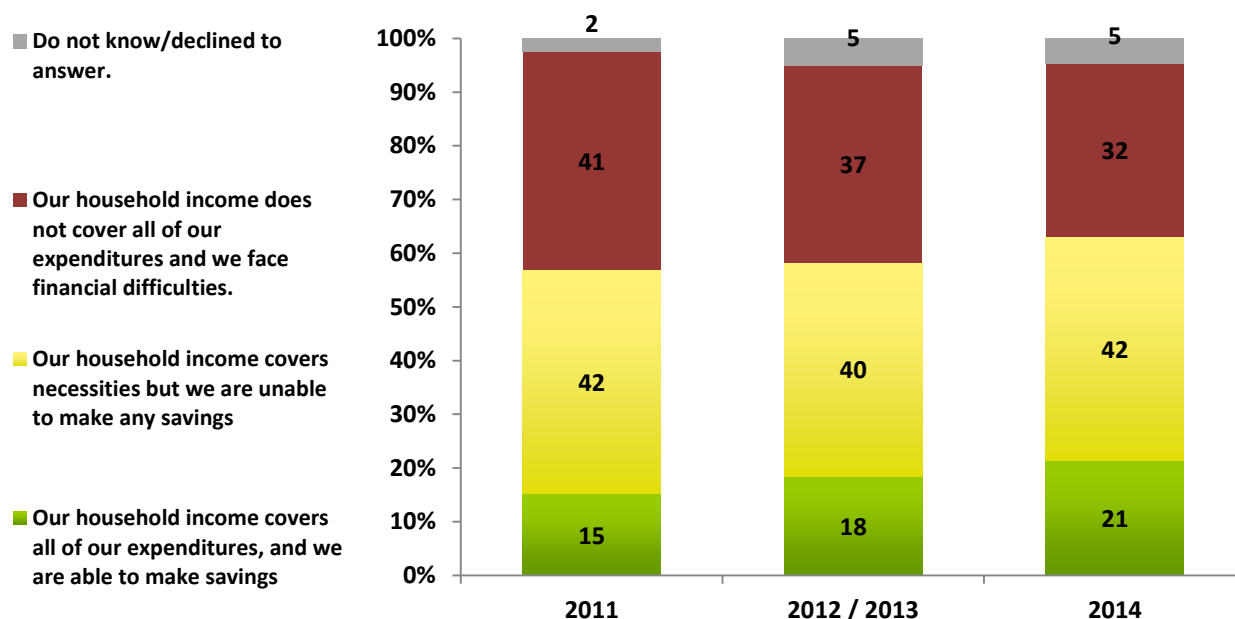
Legend:
- Do not know/declined to answer.
- Our household income does not cover all of our expenditures and we face financial difficulties.
- Our household income covers necessities but we are unable to make any savings
- Our household income covers all of our expenditures, and we are able to make savings

Chart data:

Category	2011	2012 / 2013	2014
Do not know/declined to answer	2	5	5
Income does not cover expenditures	41	37	32
Covers necessities, no savings	42	40	42
Covers all, able to save	15	18	21

Figure 1- 2 Respondents' self-reported household incomes.

- The results for the 2014 Arab Opinion Index show no (statistically significant) differences in self-reported income levels in comparison with previous years' findings. Amongst needy families, 57% resort to borrowing, either from friends, relatives and acquaintances, or from banks and other financial institutions: 18% of needy families rely on friends, relatives and acquaintances; 10% rely on charitable organizations or government assistance. This suggests that informal support networks remain more robust compared to institutional, formal support.

  Respondents' evaluations of security in their home countries in the 2014 Arab Opinion Index was more negative compared to previous years: while 46% described the level of security in their home countries positively (either "good" or "very good"), 52% evaluated the level of security in their home countries negatively.

  Respondents' attitudes towards their home countries' economic situations were similar, with 38% reporting this to be either "good" or "very good", while 60% of respondents offered a negative evaluation of their home countries' economic situations.
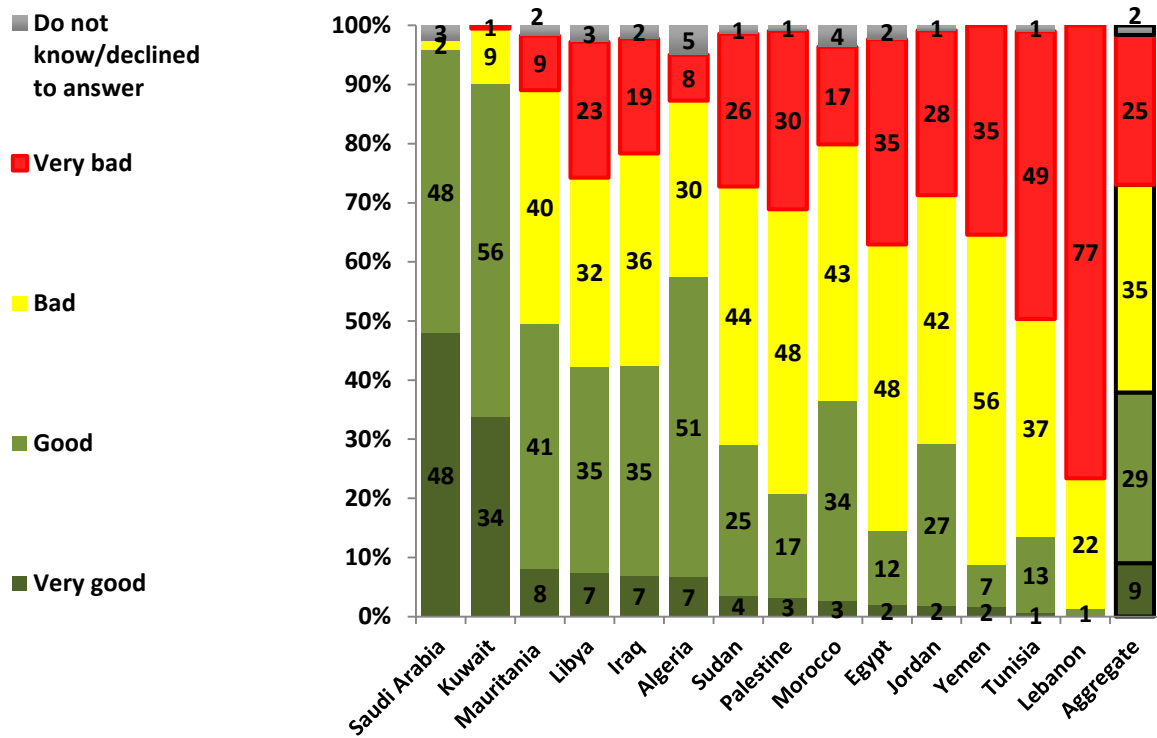
Figure 1- 3 Respondents' evaluations of their home countries' economic situations are shown here.

- Similarly, respondents' attitudes towards the political situations their home countries face have also worsened during the past year, with 59% offering a negative evaluation of the political situation of their home countries compared to 36% who described their home countries' political situations positively (either "good" or "very good").
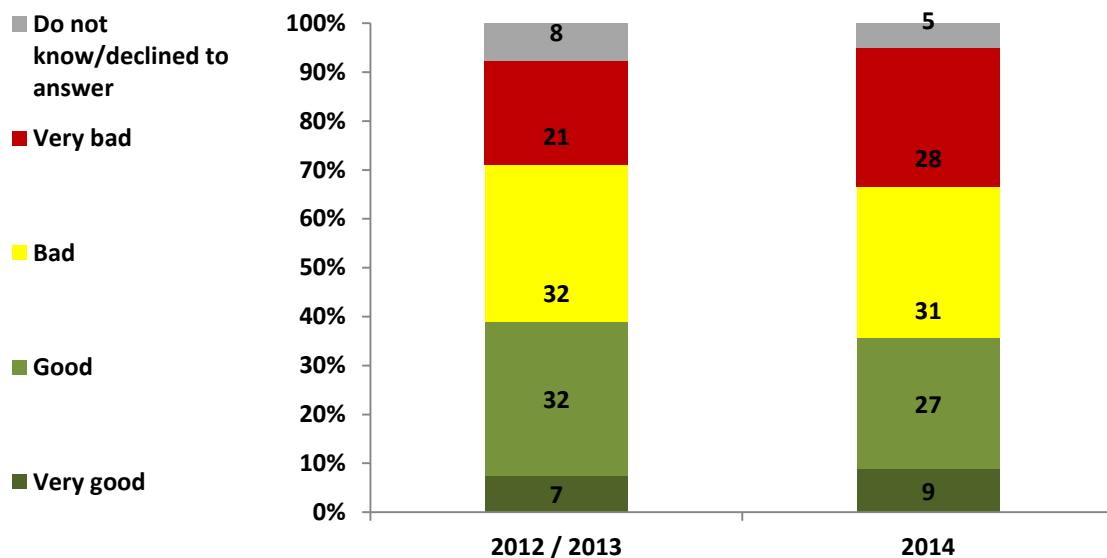
Figure 1- 4 Respondents' evaluations of their home countries' political situations.

- Responses to the 2014 Arab Opinion Index reflect a change in priorities among Arab populations, with 20% reporting concerns over "safety and security" as the primary challenge which their home countries face. This primacy of a non-economic factor is unprecedented; in the two previous surveys, unemployment had been the respondents' most-cited challenge facing their home countries.

- Fully 22% of Arab respondents report a desire to emigrate. While the desire to improve their own economic circumstances was the major motive, one-fifth of respondents indicated that an unstable security situation was their motivation for wanting to leave.
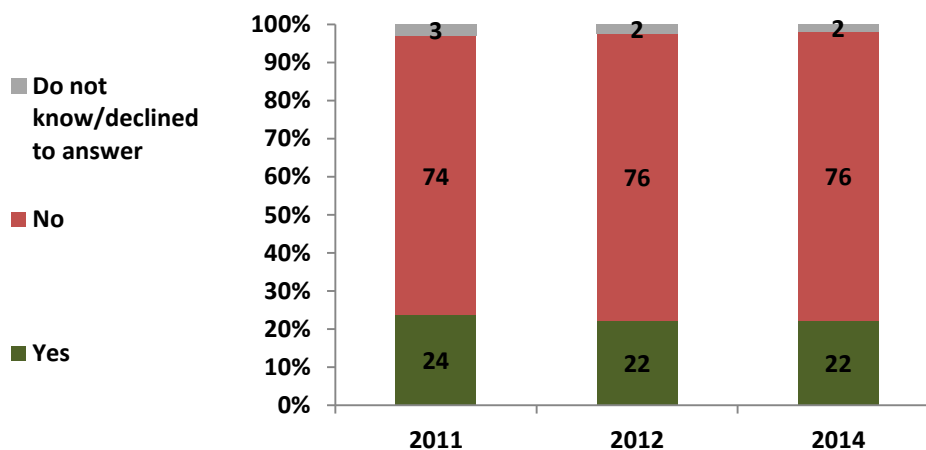

Figure 1- 5 Desire to emigrate from home countries amongst survey respondents.

- Respondents' views of which state posed the greatest threat to their home countries' national security were more varied. Across the aggregate of responses, there remains a strong bloc which views either Israel (25% of the aggregate responses) or the United States (11%) as the state which posed the greatest threat to their

home countries. A further 11% of the aggregate responses indicate Iran as the state which poses the greatest threat to their home countries' security, but this figure accounts for more than one-third of the respondents in four countries: Iraq, Saudi Arabia, Yemen and Kuwait.

Arab Citizens' Views of State Institutions and Governmental Effectiveness

- The Arab public's attitudes and levels of confidence/trust towards state institutions is varied. While confidence in military and security apparatus remains high—and particularly so for the military/army—respondents displayed far less confidence in the legislative, executive and judicial branches of government. The bodies in which respondents showed the least confidence included executive arms of the governments, legislatures and political parties of their home countries.
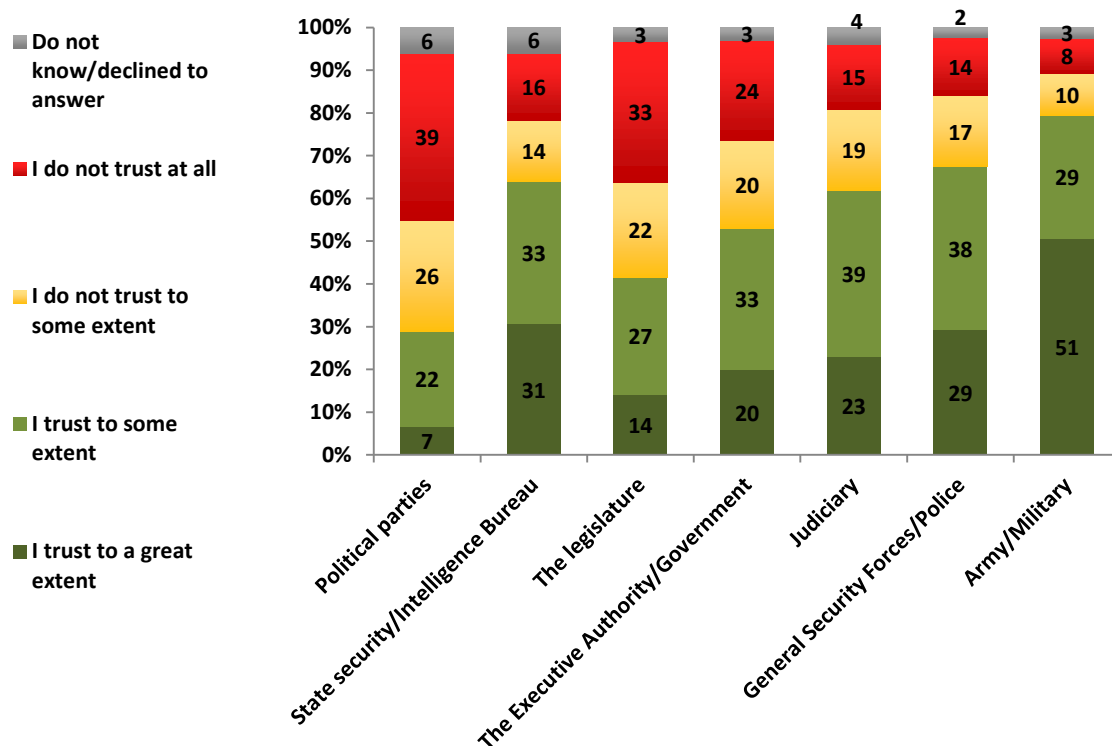

Figure 2- 1 Respondents' varying levels of confidence in a number of important state institutions.

- In general, Arab respondents had low levels of confidence in the legislatures of their home countries on specific performance indicators, including: oversight of governmental performance, public expenditure, the preservation of the interest of all societal groups, and the passing of legislation which would secure citizens' liberties.
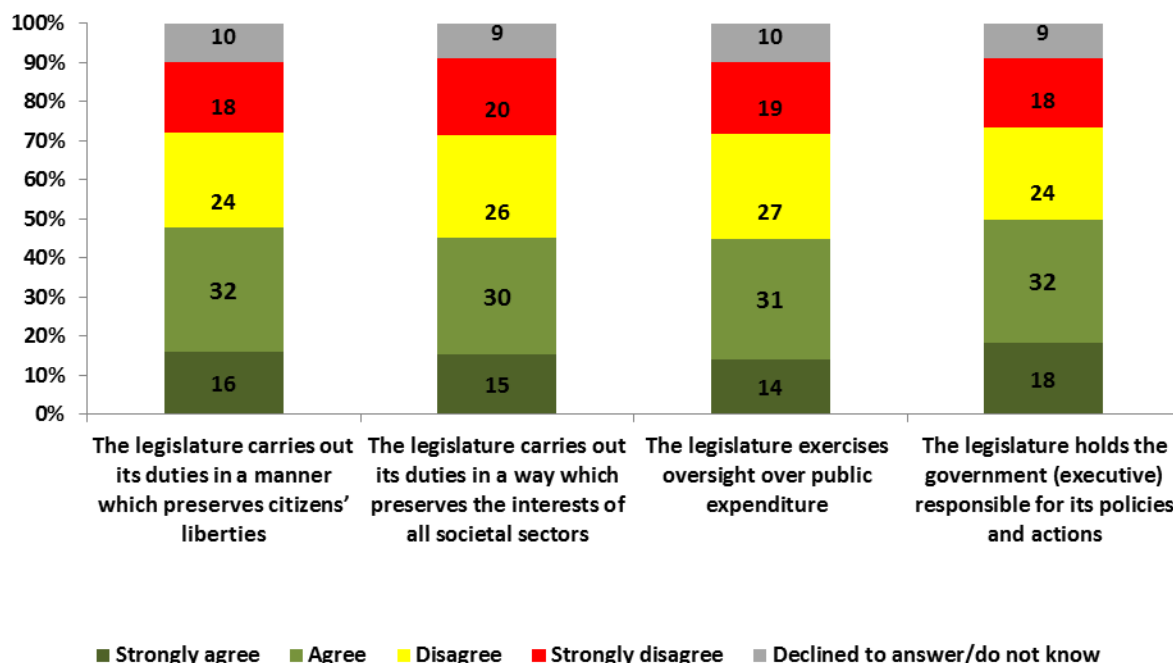
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Figure 2- 2 The Arab publics were not overly confident in the ability of the legislatures of their home countries to exercise their authorities properly.

- Similarly, the Arab public evaluated negatively their governments' performance on foreign policy, economic policy and various other services and public policy indicators. Positive evaluations of their countries' governments varied between 41% and 45% on these indicators; the broadly negative appraisal of government performance in the 2014 Arab Opinion is roughly identical to respondents' evaluations in the 2012/2013 survey.

- As with both the 2011 and the 2012/2013 surveys, respondents are nearly unanimous in believing administrative and financial corruption to be widespread in their home countries: 91% of the Arab public believes these to be either "widespread" or "very widespread". This contrasts with a mere 5% which does not believe financial and/or administrative corruption to be widespread in their home countries. These figures are exactly the same as those reported in the 2011 and 2012/2013 surveys. Arab public opinion is divided on

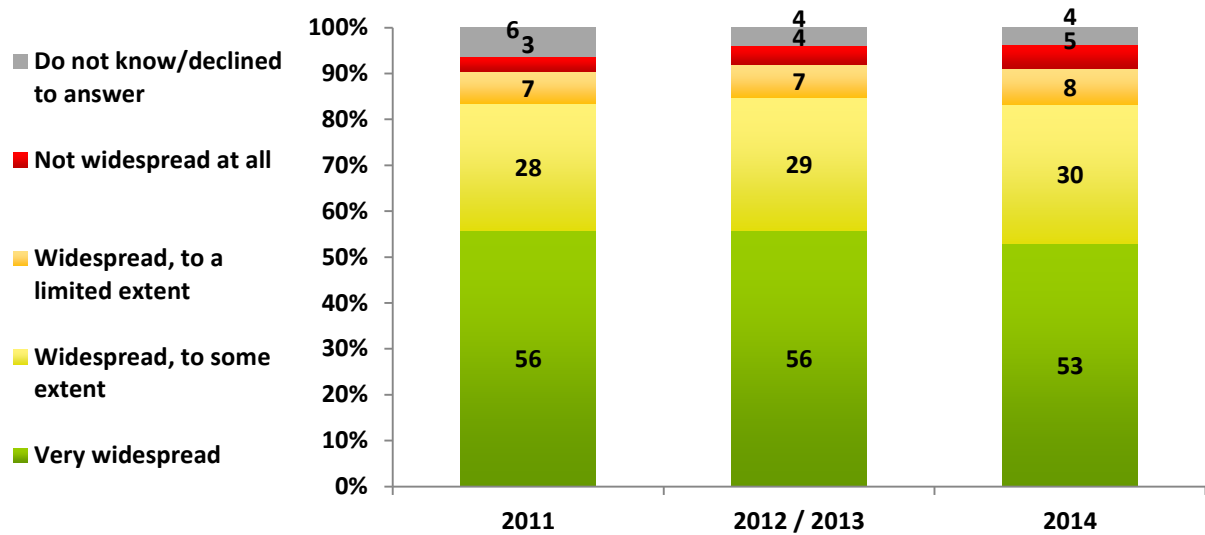whether or not their home countries' governments are genuine in the tackling of corruption.

Figure 2- 3 Respondents' reported perceptions of the prevalence of administrative and/or financial corruption in their home countries.

- The Arab publics' perception of the application of the rule of law by their governments has remained steady throughout the years of the survey. When asked if the rule of law applies equally to all citizens in their home countries, only 21% of respondents said that this was true unreservedly. A further 53% reported that the state applied the rule of law, but that it favored some groups over others. Another 22% indicated that "The State completely does not apply the rule of law". This uncertainty about the principle of equal justice extended to respondents' expectations of a fair trial: only 53% believed that the principle of a fair trial was respected in their home countries, compared to 44% who did not believe that the principle of a fair trial was respected.
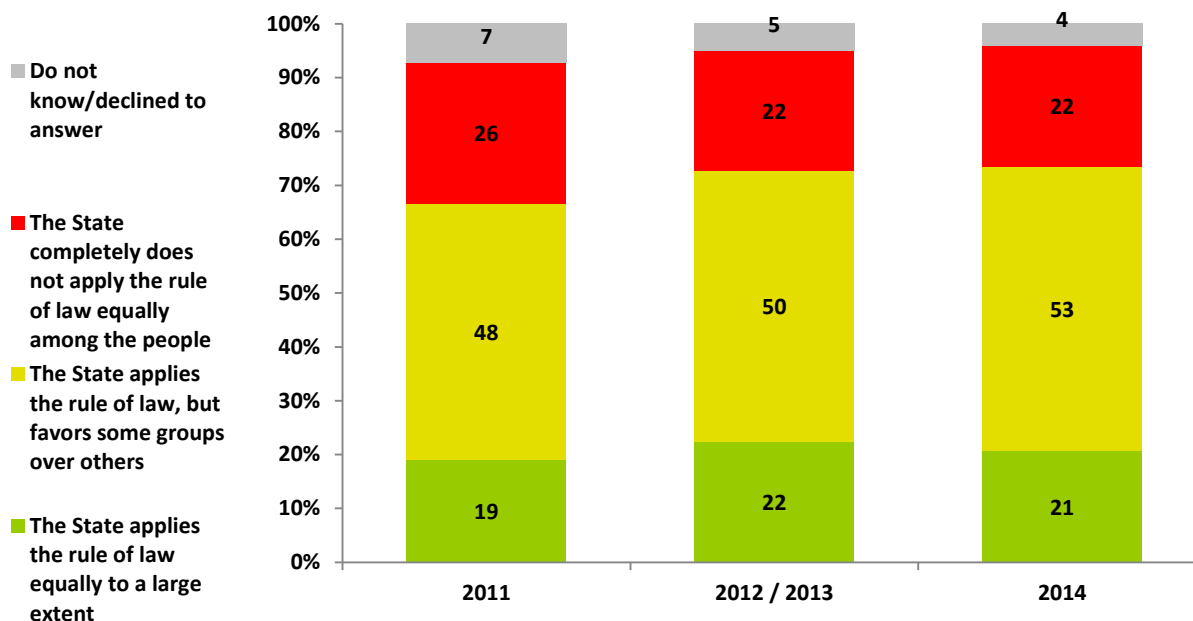
Figure 2- 4 Only 21% of the Arab public believes that the rule of law applies equally to all citizens in their home countries.
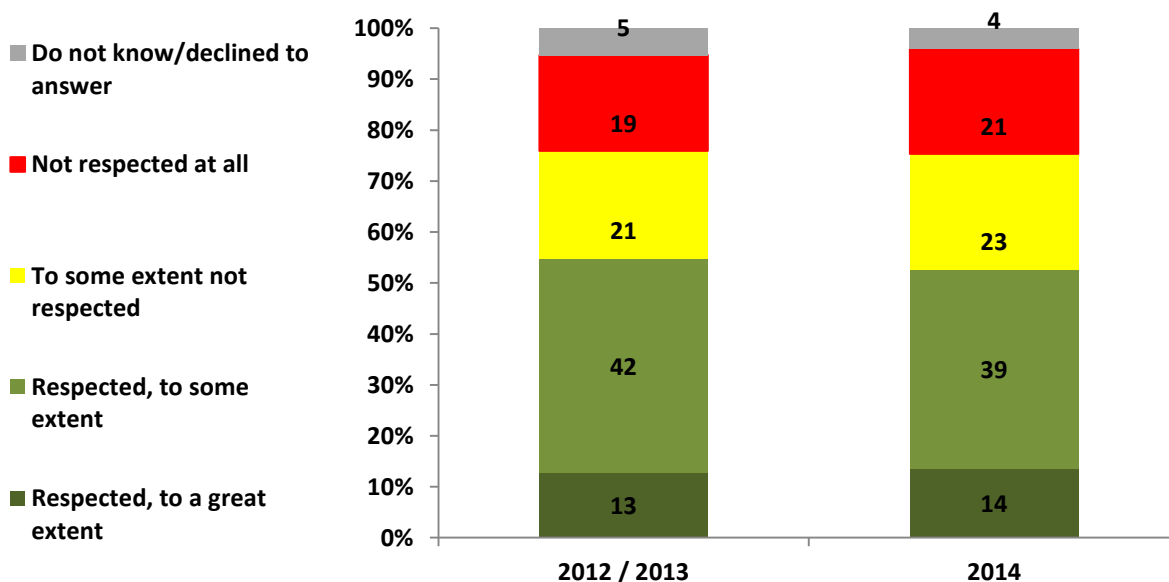

Figure 2- 5 Respondents were asked the extent to which the principle of a fair trial was respected in their home countries.

Arab Public Attitudes towards Democracy

- Respondents defined democracy in a variety of ways. A clear majority of 87% of Arab citizens can provide a coherent, meaningful definition of democracy: 38% define democracy as the guarantee of political and civil rights; 24% define democracy as the guarantee of equality and justice; 10% define democracy as a system

which guarantees the peaceful transition of power and the separation of powers/the principle of checks and balances; 8% define democracy as the guarantee of security and stability; while 5% provided a definition of democracy as the improvement of economic circumstances. Notably, responses to the 2014 survey show an increased number of respondents whose definitions of democracy are centered on security and stability. The same results also show a decrease in those who defined democracy in procedural terms.
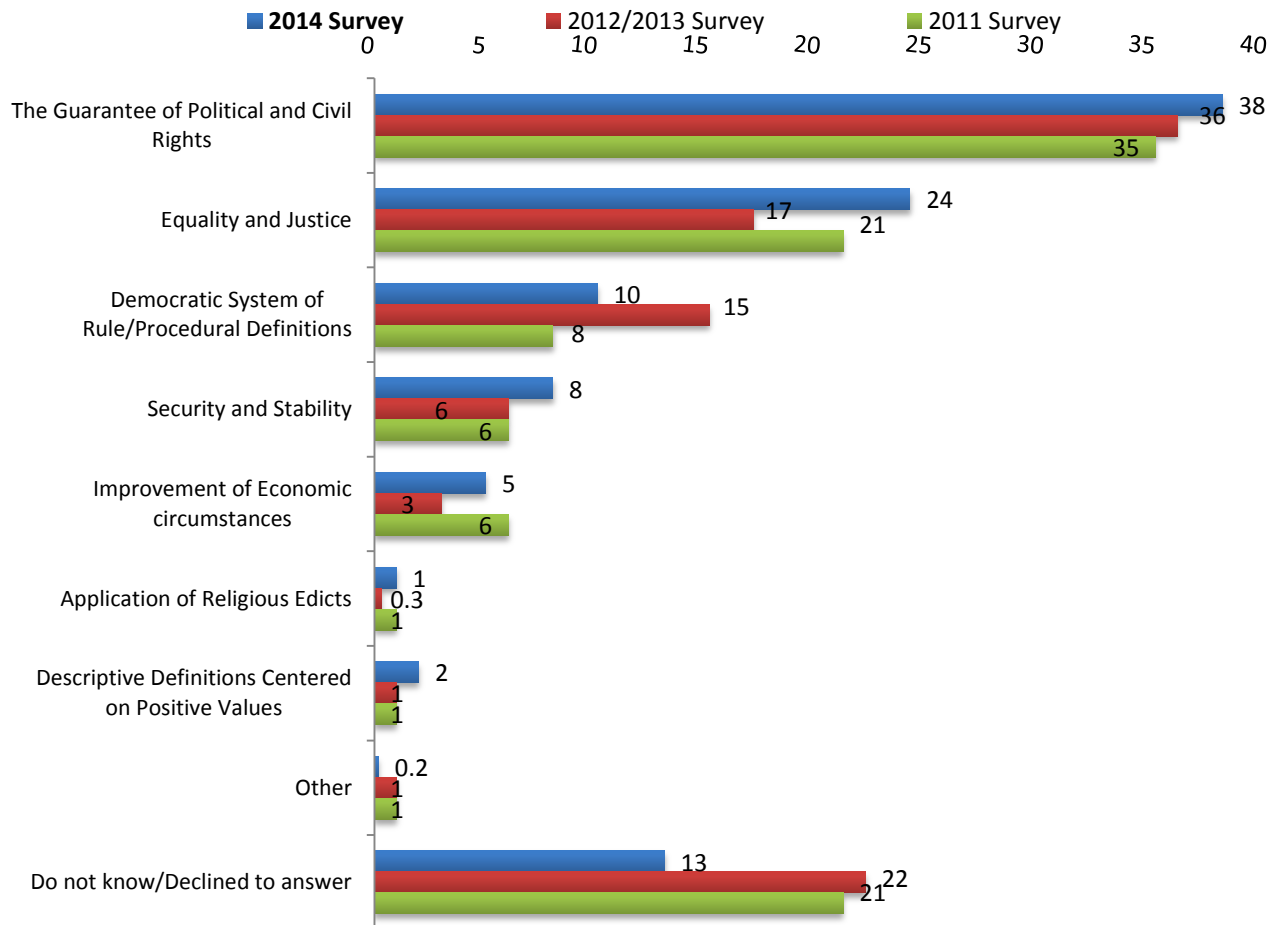

Figure 3- 1 Arab respondents' definitions of democracy centered on a variety of different bases.

- Most Arabs do not agree with statements which cast the democratic system in a negative light.
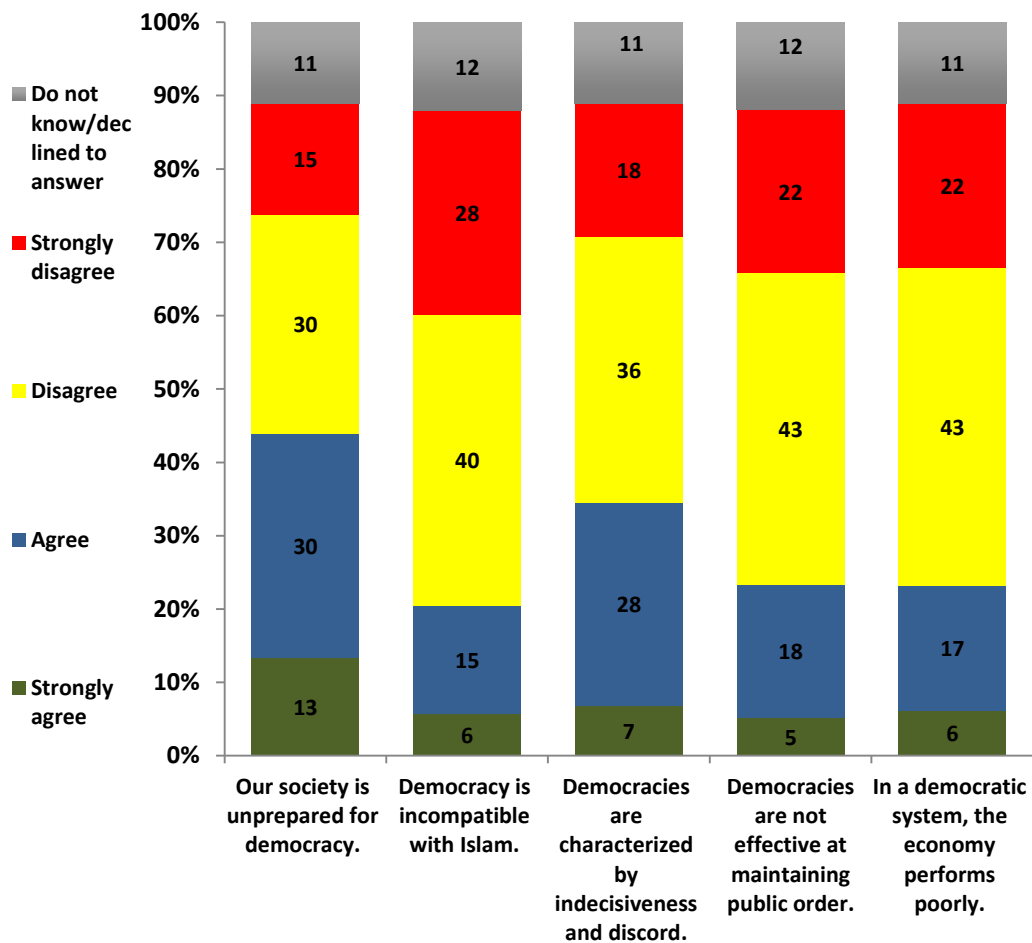
Figure 3- 2 Statements which reflect a negative attitude towards democracy are not popular amongst the Arab public.

- An overwhelming majority of 73% of the Arab public agree with the statement "Democracy has its own problems but remains better" than other systems of government. When asked to compare democracy to other forms of rule, such as authoritarianism, theocracies or representative systems where elections are limited to a particular type of political party—for example religious parties, or systems where electoral competition is limited to non-religious parties—the Arab public consistently rates democracy as the most appropriate for their country.
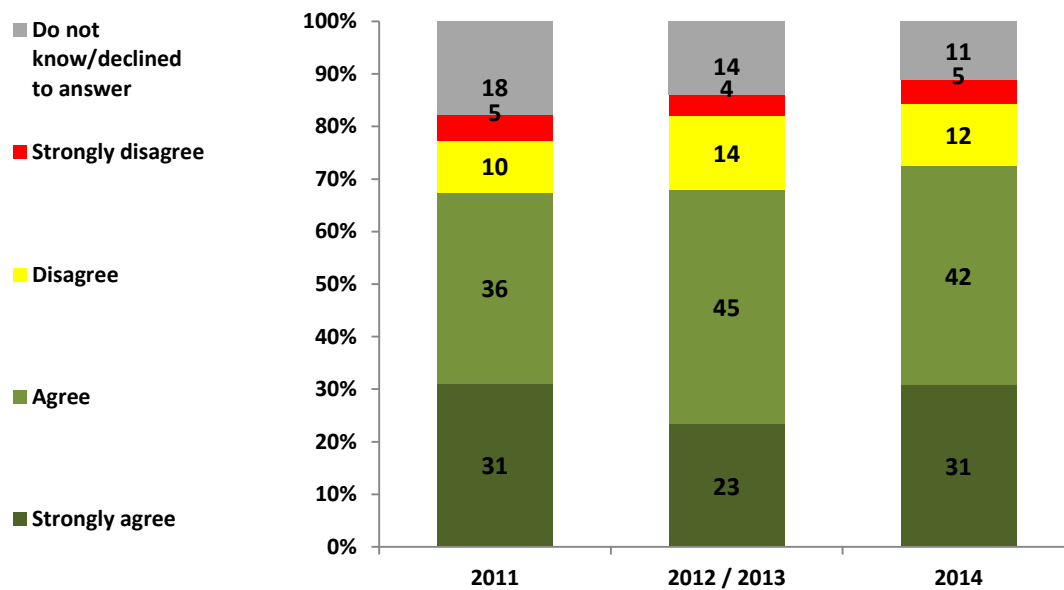
Figure 3- 3 Respondents to the survey have consistently agreed that democracy remains better than other forms of government.
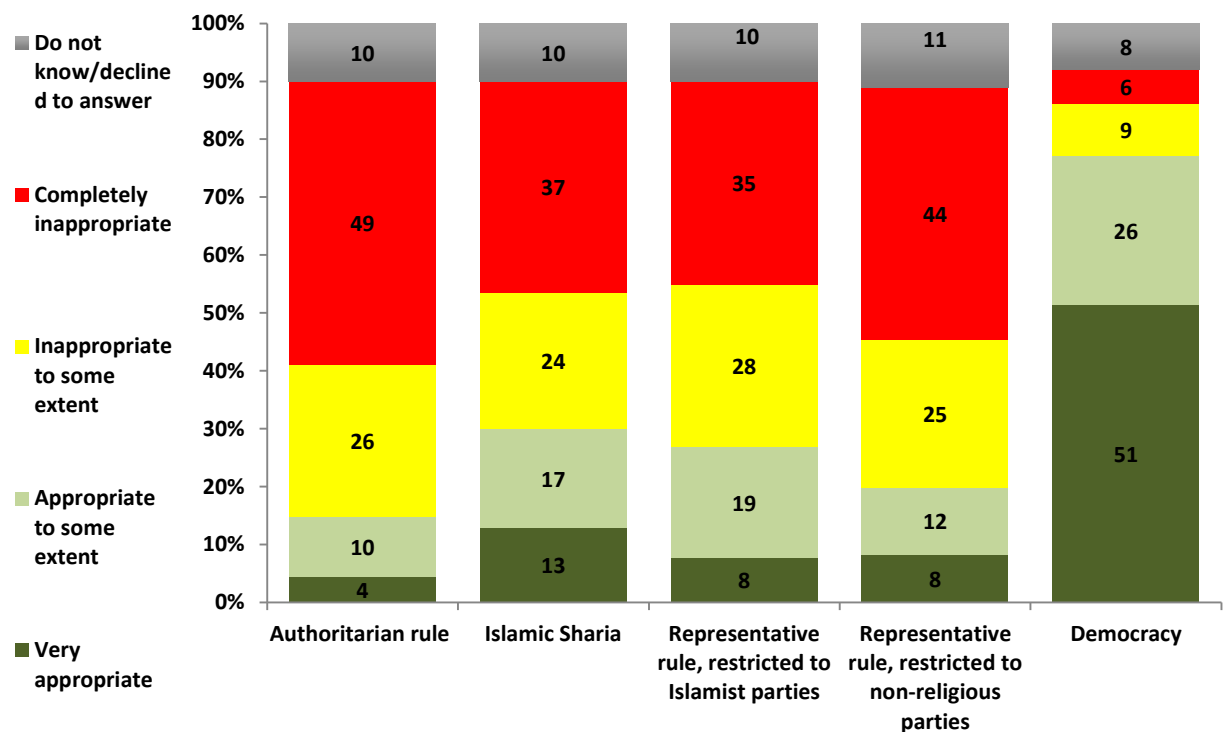

Figure 3- 4 When compared to other types of government, democracy was chosen by Arab respondents as the most appropriate for their home countries.

- 57% of the Arab public would accept the electoral rise to power of a political party they disagreed with, compared to 35% who stated that they would not accept such a turn of events. While fully two-thirds of respondents would explicitly approve of an Islamist political party coming to power through the ballot box, opinion was more divided on the question of a secular party coming to power via elections.
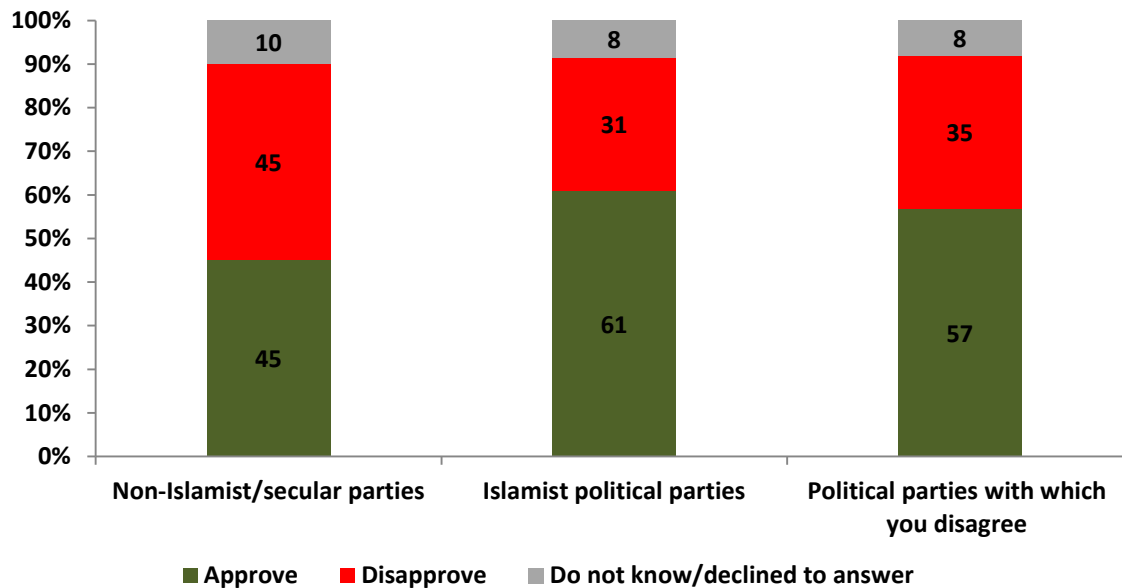

Figure 3- 5 The Arab public would approve, in principle, of an Islamist political party coming to power through the ballot box. Opinion is more divided on the question of secular parties.

- When asked to rate the level of democracy in their home countries on a scale from 1 to 10—with 1 being "completely undemocratic", and 10 being "democratic to the greatest possible extent", respondents rated their countries at a mid-way value, with the average score of 5.2 not changing drastically compared to previous surveys.
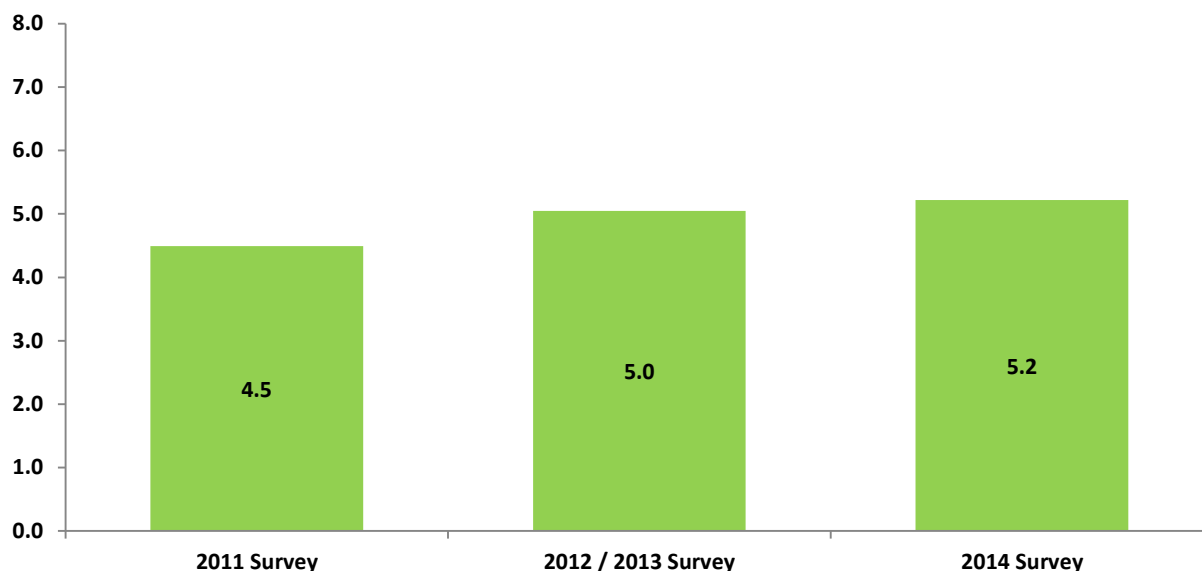
Figure 3- 6 Respondents' evaluation of the extent of democracy in their home countries on a 10-point scale has varied little over three consecutive surveys.

Civic   and   Political   Participation

- A majority of the Arab publics describe themselves as being interested in the political affairs of their home countries, but the proportion of those interested has declined in the 2014 survey as compared to the 2012/2013 Arab Opinion Index. This is also closer to the results recorded for the 2011 Arab Opinion Index.
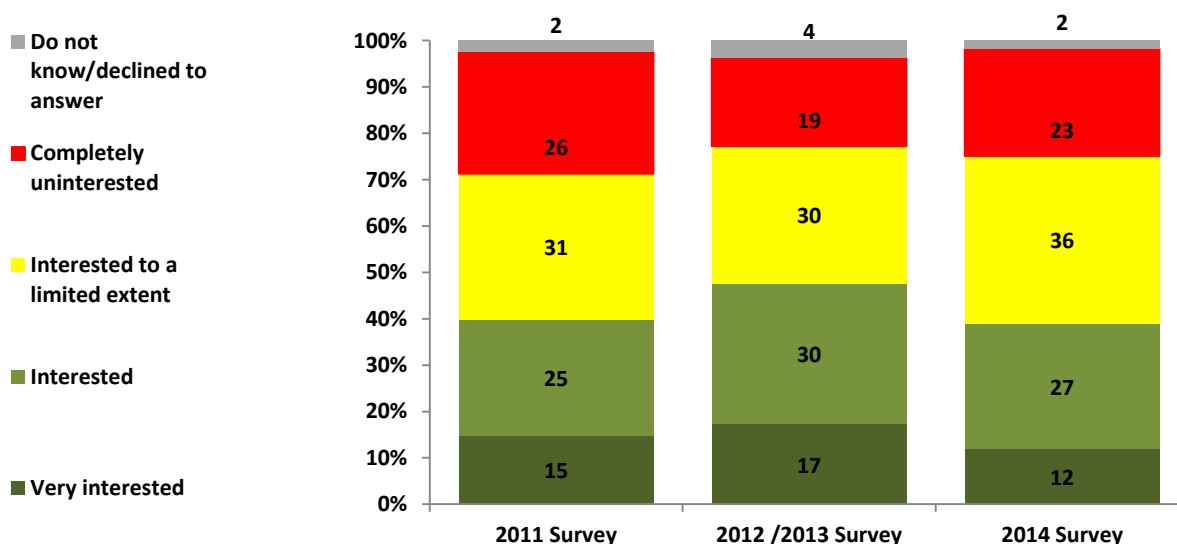

Figure 4- 1 The level of interest in political affairs has declined in the 2014 Arab Opinion Index.

- Television is by far the most important source of political information and news for the Arab public, with 76% of respondents reporting that they rely on this medium as their primary source of political news. The internet

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comes in as a distant second with 7% of respondents reporting that they rely on it as a primary source of political news; radio and daily newspapers are joint third, with 6% of respondents reporting these media as their main source of political news. Further, the state/official broadcasters were the most popular television channels followed by the Arab public: 15.9% of respondents reported these as their preferred source of political news. The Al Jazeera network followed this category, with 14.3% of respondents reporting it as their preferred source of political information; the Al Arabiya network came in at 8.4% of respondents.
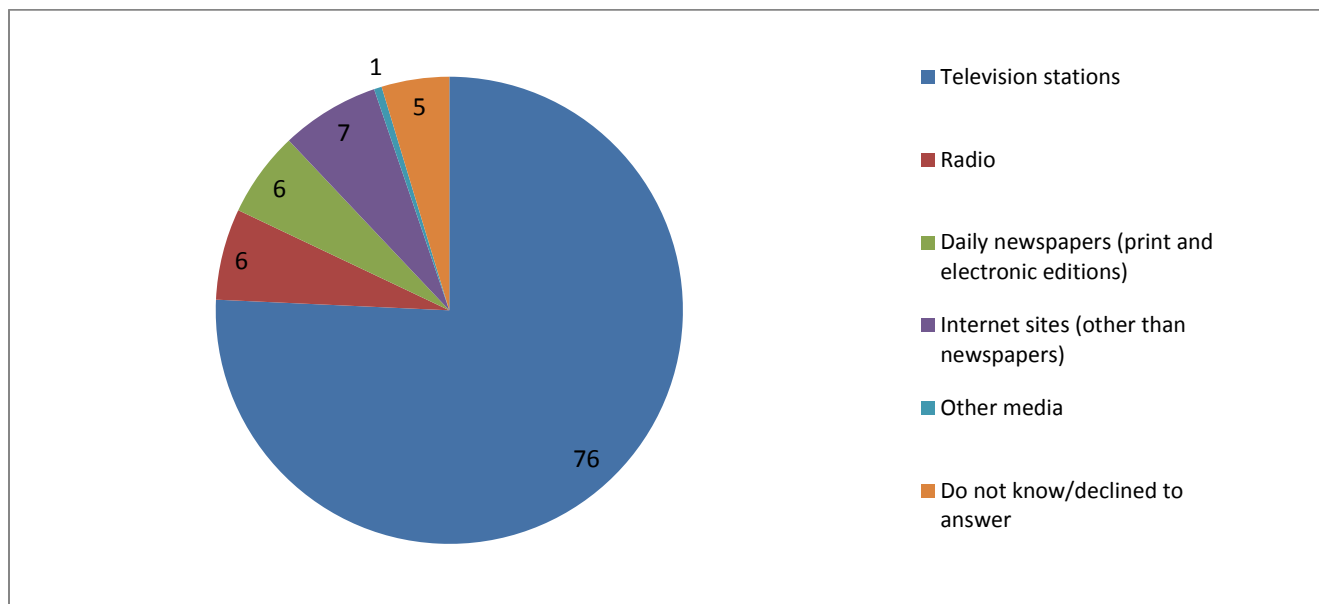
Legend:
- Television stations
- Radio
- Daily newspapers (print and electronic editions)
- Internet sites (other than newspapers)
- Other media
- Do not know/declined to answer

Figure 4- 2 Arab respondents' preferred sources of political information/news.

- Reported rates of internet usage have increased markedly over the past year, yet there is still nearly a one-half split: 48% of respondents report not using the internet, while 50% do use the internet, with varying levels of frequency. Amongst those respondents who use the internet, social media networks were well represented: 71% of Arab internet users have a Facebook account, and 29% have a Twitter account. Finally, most of those respondents who have social media accounts use these to engage with political affairs.
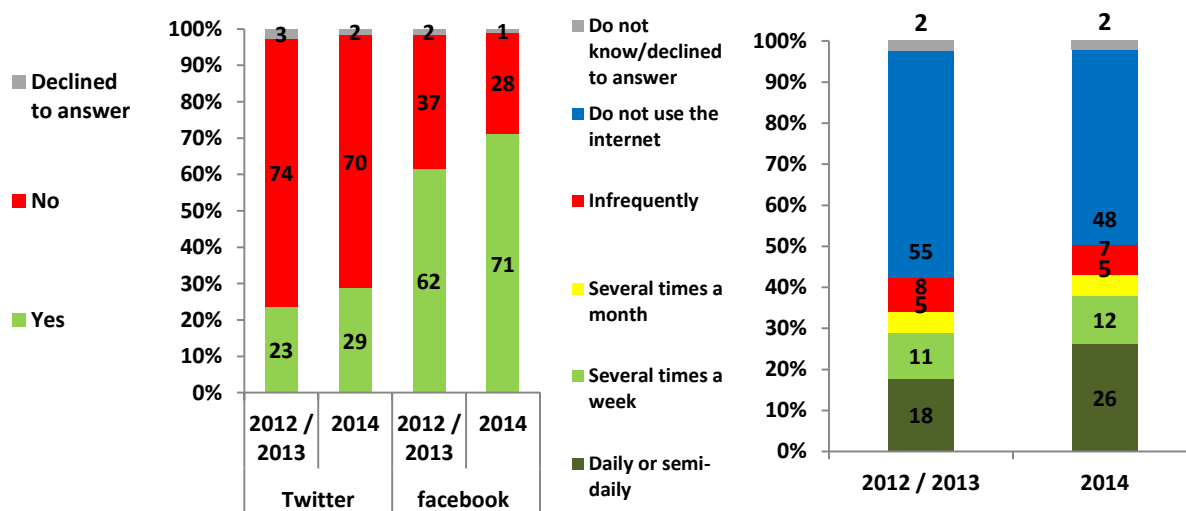

Figure 4- 3 (l): Social media networks have had increased usage over this past year; (r): the results from this year's survey show increased rates of internet usage, with daily and semi-daily users increasing in proportion.

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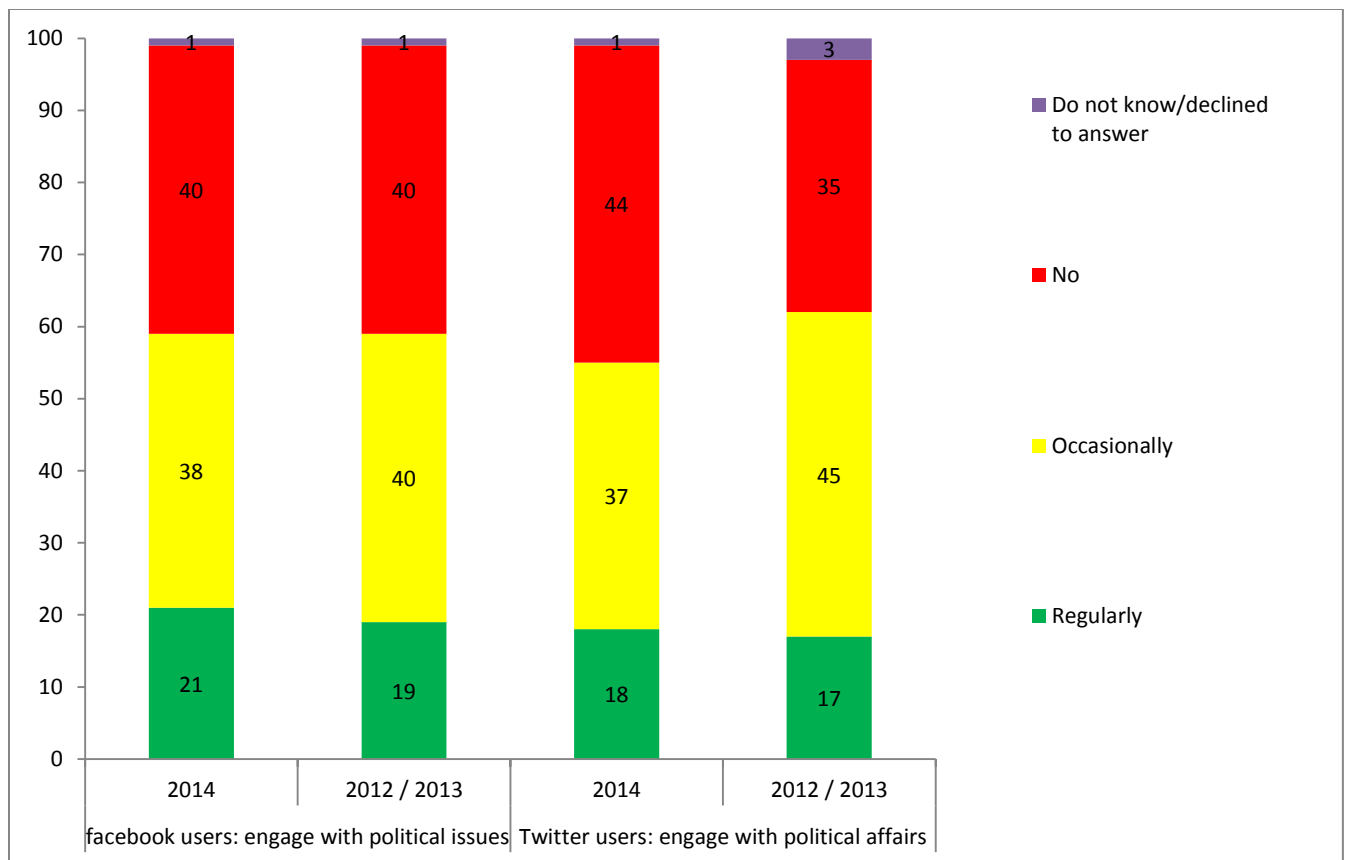**Figure 4- 4 Most Arab social media users use their accounts to engage with political affairs.**

- In line with previous years, reported membership in civic and voluntary organizations remains low, not exceeding 12% of the Arab public.
- A majority of 51% of the Arab public reports that they are unaffiliated with any political party, and that their views are not represented by any political party.

Unaffiliated with any political party, but views represented by a political party/bloc/faction
20

Unaffiliated with a political party, but intend to join one
2

Affiliated with a political party
13

Unaffiliated with any political party, and views are not represented by any political party/bloc/faction.
51

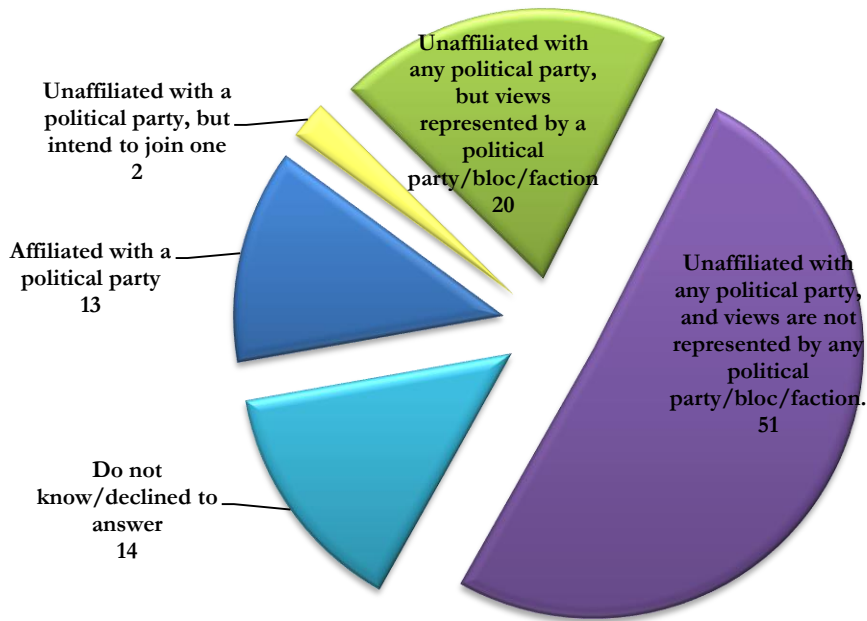**Do not know/declined to answer**
14

Figure 4- 5 A majority of the Arab public are not affiliated with any political parties, nor do they feel that there exists a political party which represents their views.

Religion,   Religiosity   and   the   Public   Sphere

- A majority of the Arab public is either "Very religious" (24%) or "Religious to some extent" (63%). When asked which attributes define religiosity, most respondents opt to choose characteristics based on an individual's morality and values.

Figure 5- 1 Respondents' self-reporting of their religiosity over three consecutive surveys.
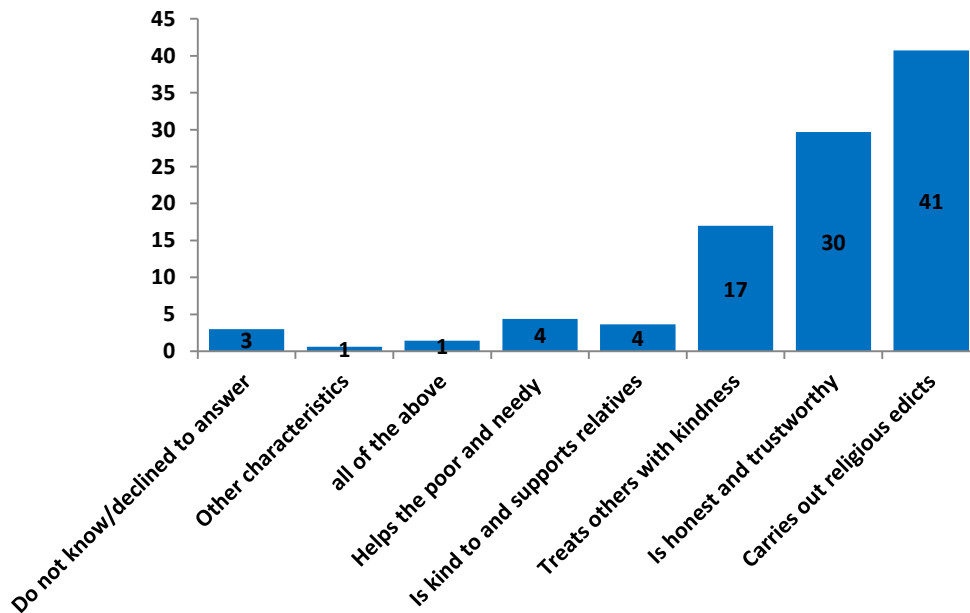

Figure 5- 2 Frequency of different characteristics cited by respondents as the most important for being considered religious.

- While a majority of respondents describe themselves as religious, they nonetheless express opposition to pronouncements against followers of other faiths, and against pronouncing adherents of differing interpretations of the same faith as apostates. A majority of the Arab public does not accept that a non-religious person is not a good person. In addition, a majority of respondents expressed no preference for dealing with religious individuals in their daily dealings.
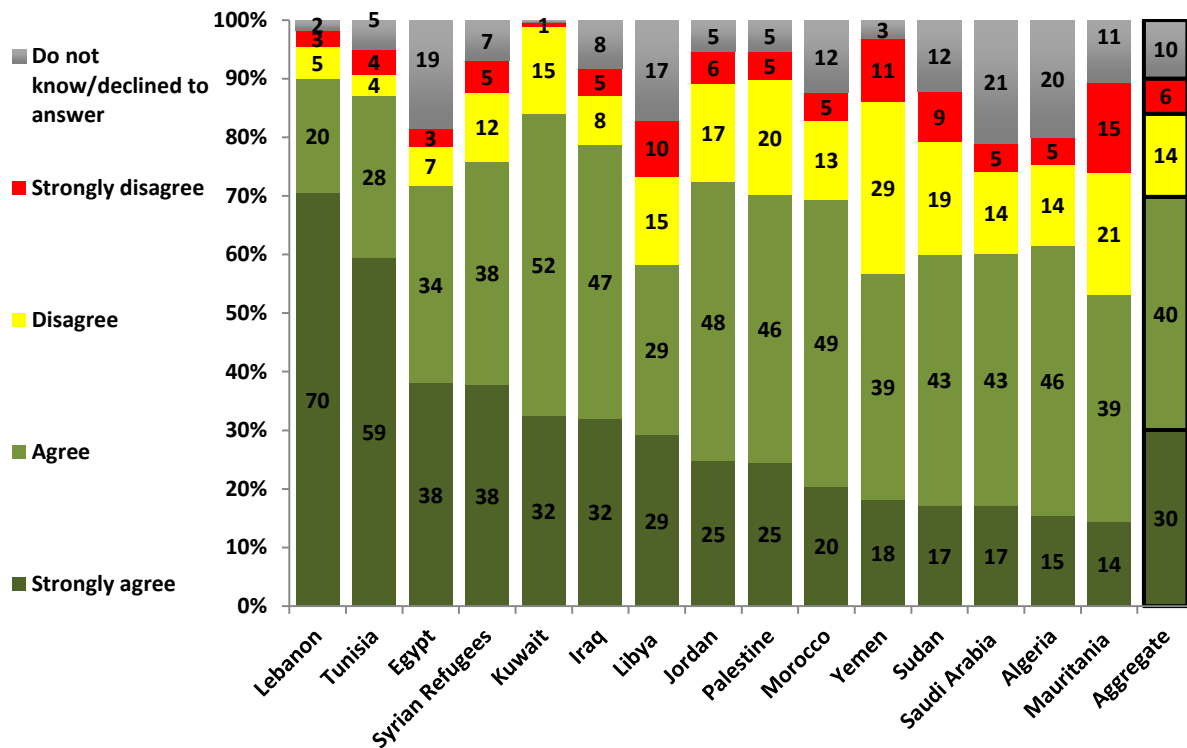
Figure 5- 3 Levels of agreement and disagreement with the statement: "No person/group has the right to declare followers of other religions to be infidels".

- In principle, respondents' attitudes towards the separation of religion from politics are roughly equivocal, with proponents of the division between religion and politics slightly in the lead. Most respondents, however, also clearly voice opposition to the influence of clerics on either governmental policies or voter decisions. Similarly, a majority of Arabs are opposed to the use of religion by governments to secure approval for their policies, or by candidates to win votes.

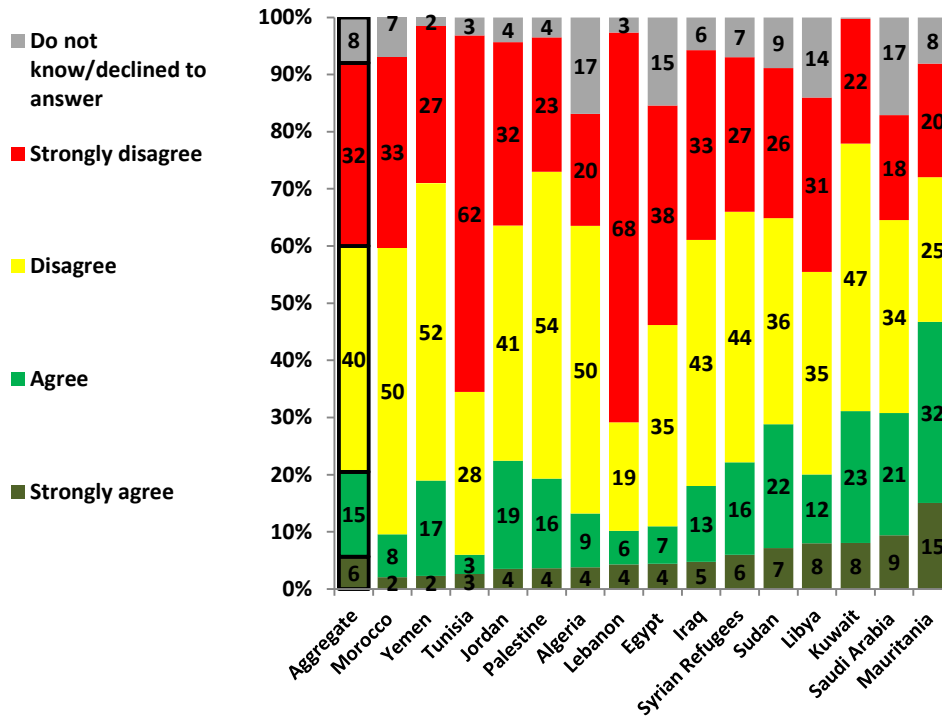**Figure 5- 4 Respondents were asked to rate the extent of their agreement/disagreement with the statement "Electoral candidates have the right to use religion as a means of winning voter support".**
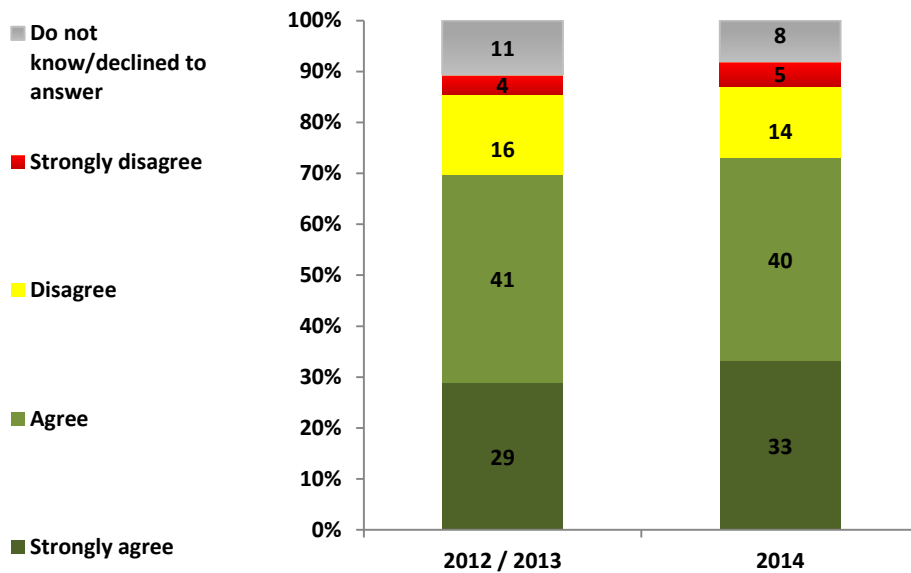
Figure 5- 5 Respondents were asked to express the extent of their agreement/disagreement with the statement "The government does NOT have the right to use religion as a means of winning public support."
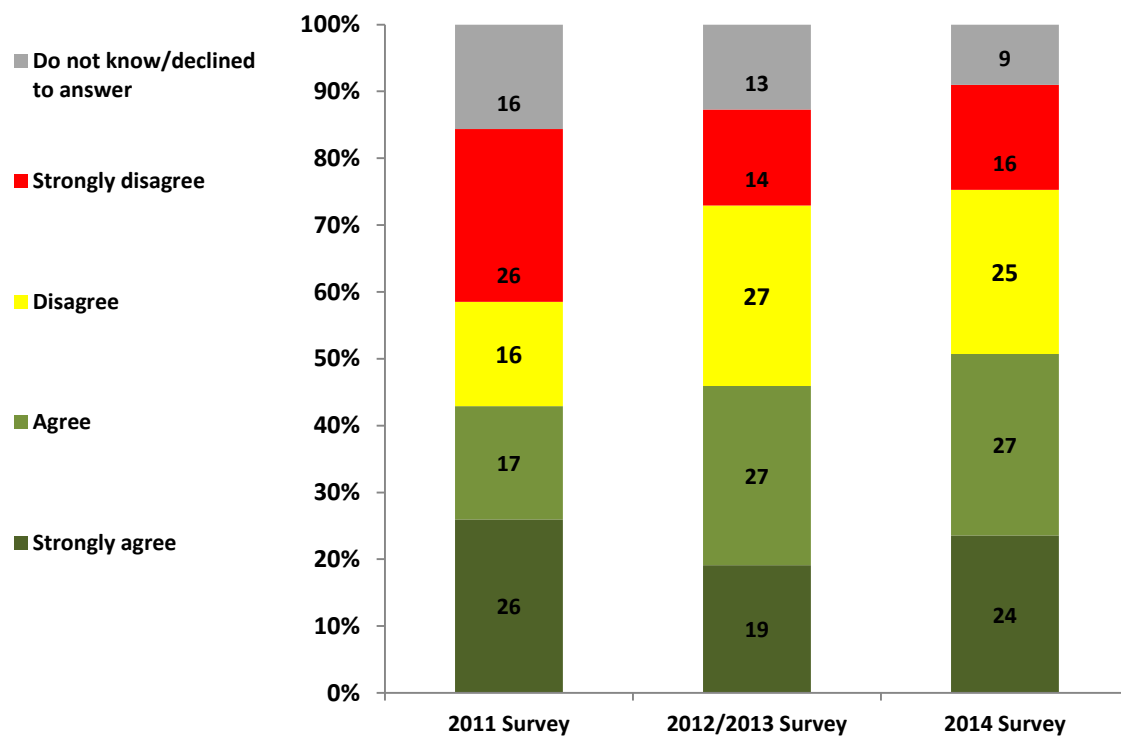
Attitudes   towards   Pan-Arab   Affairs

- A total of 81% of Arab respondents expressed the views that the citizens of the various Arab states were either "one nation sharing the same characteristics, even if they are divided by artificial borders" (39%) or "one nation, although each of the peoples within that nation have their own distinct characteristics" (42%).

■ Do not know/declined to answer

■ They are in fact different nations and peoples tied together by only tenuous links

■ They are one nation, although each of the peoples within that nation have their own distinct characteristics

■ They are one nation sharing the same characteristics, even if they are divided by artificial borders

Year	2011	2012 / 2013	2014
Do not know/declined	11	7	5
Different nations/tenuous	17	14	14
One nation, distinct	36	35	42
One nation, same characteristics	35	44	39

Figure 6- 1 Respondents' attitudes towards the unity of the Arab nation: changing opinions over three years.

- Roughly one-half of respondents had negative evaluations of the foreign policies of Iran (52%) and the United States (49%) towards the Arab region. Attitudes towards the foreign policy of Russia towards the Arab region were slightly less negative (42%), while the respondents had positive attitudes towards the foreign policies of China, France and Turkey towards the Arab region.

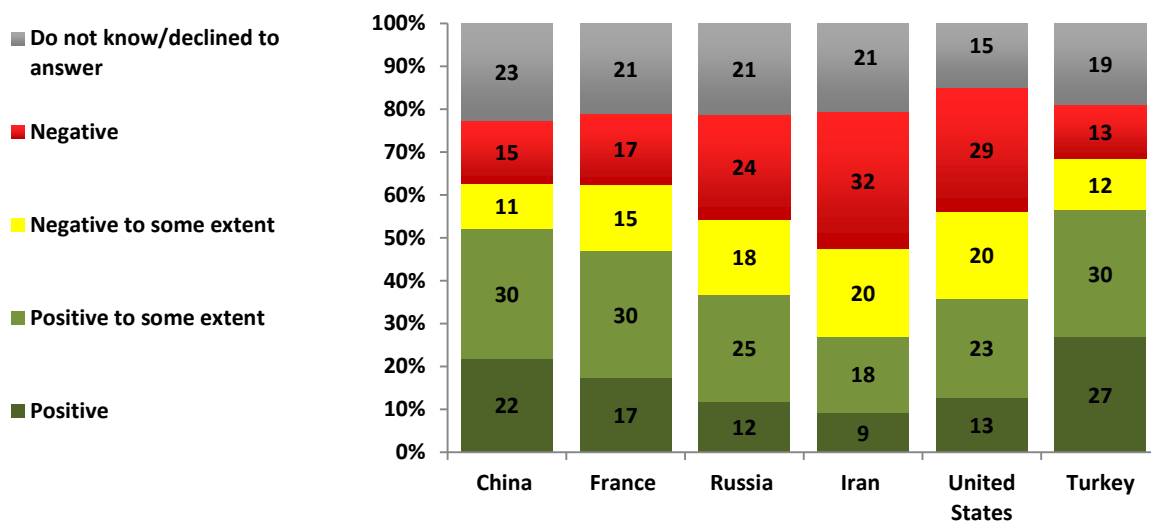**Figure 6- 2 How respondents viewed the foreign policies of a number of countries towards the Arab region.**

- A majority of the Arab public is favorably disposed towards the strengthening of relations with China, France and Turkey. Meanwhile, fewer than 50% of respondents voiced a desire for relations between their governments and those of either the United States or Russia to be strengthened. Arab public opinion towards Iran was equivocal: camps of 31% of total opinion each supported either "strengthening" or "limiting" relations with Iran, while 34% preferred that relations between their governments and Iran be maintained at their present level.
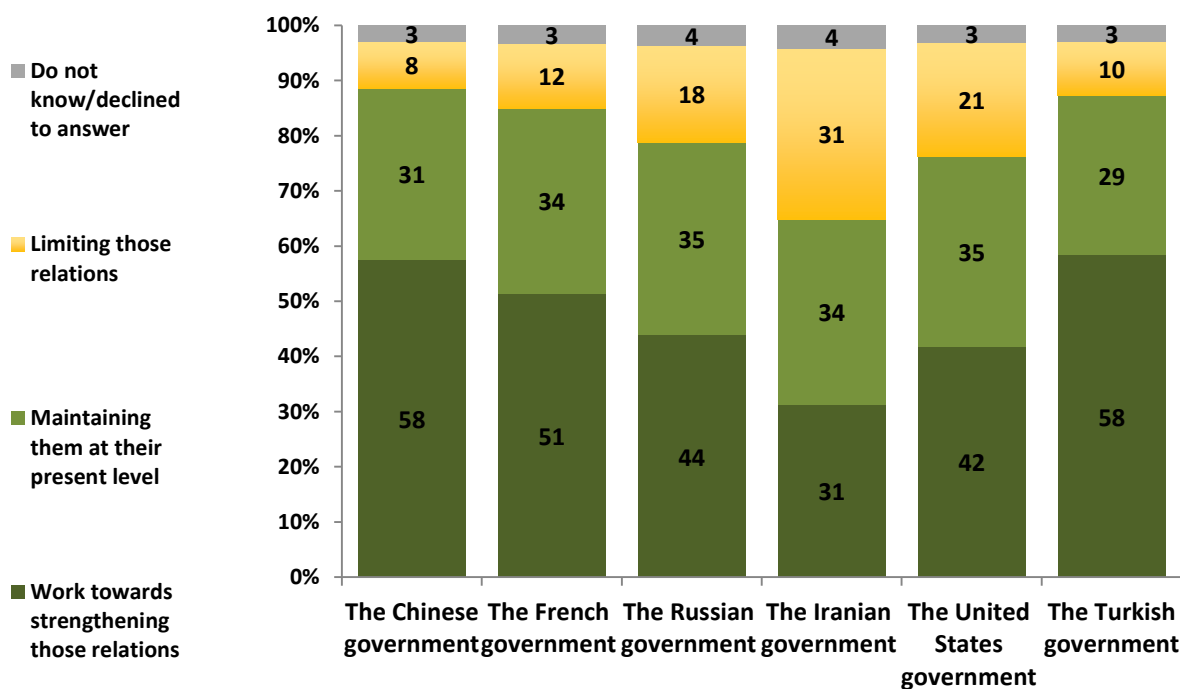

Figure 6- 3 The Arab public is favorably disposed towards strengthening relations with China, France and Turkey.

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- A clear majority (77%) of respondents agrees with the statement that "The Palestinian cause is a cause for all Arabs and not the Palestinian people alone".

Do not know/declined to answer

I do not agree with either one of the above two statements

The Palestinian cause is a cause of the Palestinians solely, and they alone should work to resolve it

The Palestinian cause is a cause for all Arabs and not the Palestinian people alone

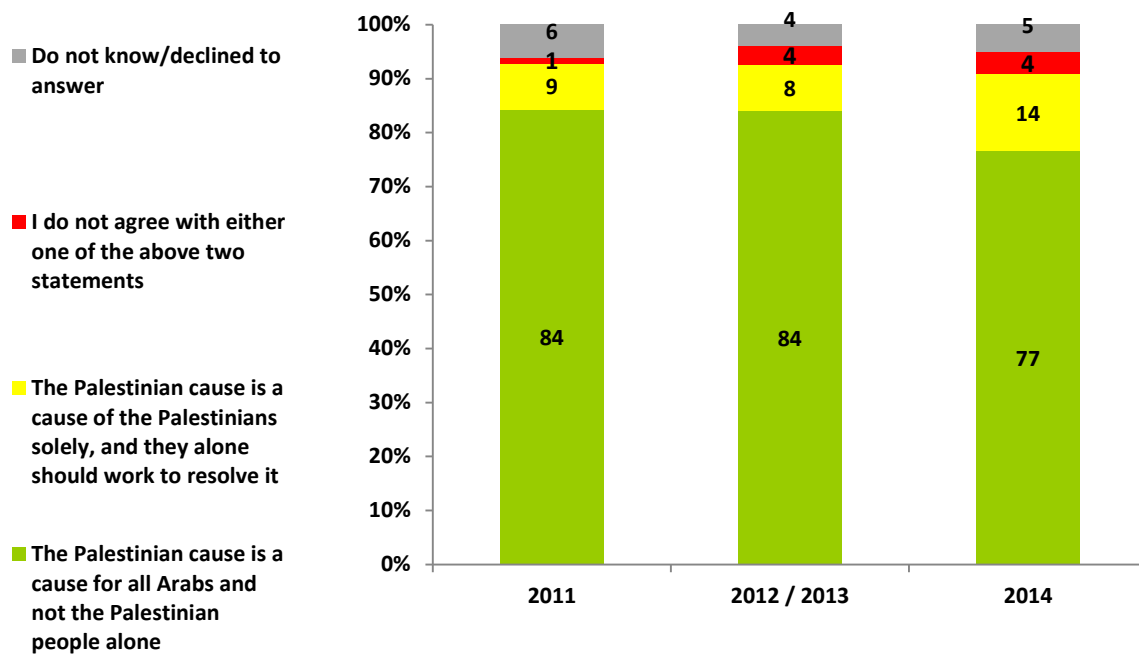|	2011	2012 / 2013	2014
Do not know/declined to answer	6	4	5
I do not agree	1	4	4
Cause of the Palestinians solely	9	8	14
Cause for all Arabs	84	84	77

Figure 6- 4 Respondents' perceptions of the Palestinian cause, and its commonality or otherwise for all Arabs.

- Similarly, a majority of Arabs are opposed to the series of peace treaties between various Arab states and Israel (including the Wadi Araba Treaty between Israel and Jordan; the Egyptian-Israeli Camp David Accords; and the Oslo Accords signed by the Palestine Liberation Organization). Fully 87% of Arab citizens are opposed to the recognition of Israel by their governments.
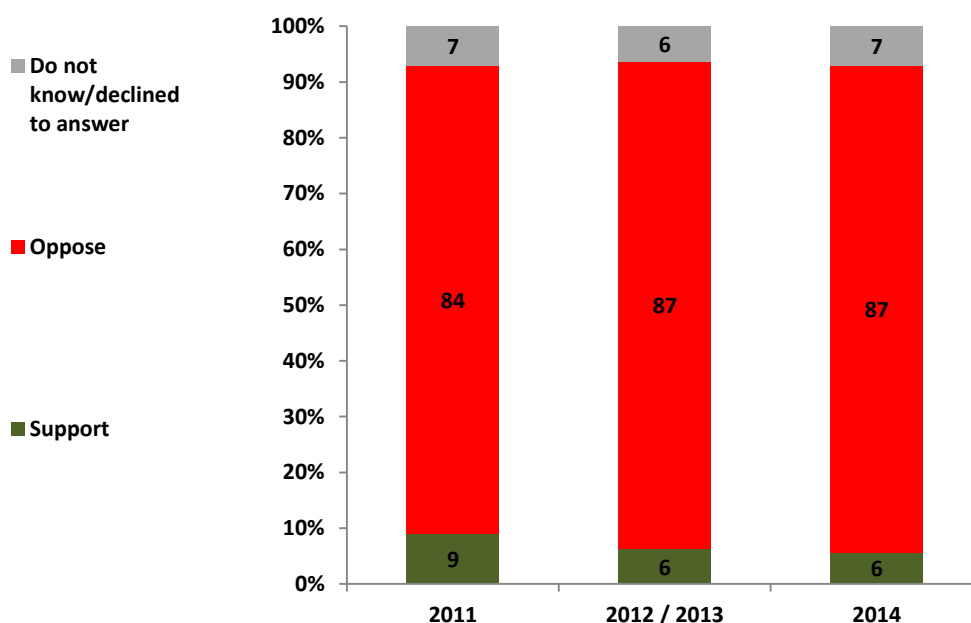
Figure 6- 5 Respondents' opposition to/support for recognition of Israel by their home countries.

- When asked to explain their positions, most of those who were opposed to the recognition of the State of Israel by their governments provided explanations related to Israel's racist, expansionist and colonialist nature.

Table 1 Reasons cited by respondents for opposing recognition of Israel by their home countries.

Respondents opposed to the recognition of Israel by their home countries: reasons cited (percentage of total respondents)	Aggregate response(%)
Israel is a colonialist, expansionist state	25.1
It is a Zionist entity which treats the Arabs with disdain and racism	13.1
Because of Israeli enmity towards my people in particular/the Arabs in general	12.3
Doing so would be to accept the destruction of the Palestinian homeland	8.1
Its dispossession of the Palestinians and its continued oppression of those people	5.9
(Israel) threatens my home country's national security and destabilizes the region	2.7
It is an expansion state which seeks to dominate the Arab world and control its resources	2.5
It does not respect international law	2.5
It is a terrorist state/supports terrorism	1.2
Respondents who cited religious reasons	5.2

- Fully two-thirds (66%) of respondents named either the United States or Israel as the states which were the single greatest threat to collective Arab security.

Table 2 Respondents in countries across the Arab world named Israel and the US as the biggest threat to their country.

	Israel	United States	Iran	(Other) Arab States	European states	Others	Non-state actors	Other	Do not know/declined to answer	Aggregate
Mauritania	63	25	2	2	3	0.4	--	--	6	100
Morocco	49	19	4	3	2	0.4	--	--	23	100
Lebanon	48	22	12	11	0.2	0.1	--	--	7	100
Jordan	47	23	10	4	3	0.1	--	--	14	100
Syrian Refugees	44	17	25	1	3	0.4	0.0	0.2	9	100
Libya	44	16	3	7	2	0.4	--	1	27	100
Algeria	42	24	1	6	2	2	--	--	21	100
Tunisia	42	27	2	14	1	1	--	--	13	100
Iraq	42	27	7	7	2	2	--	--	14	100
Yemen	42	30	12	5	2	2	0.3	--	7	100
Sudan	40	16	6	3	1	1	--	0.1	33	100
Saudi Arabia	40	11	20	0.4	5	0.3	--	--	23	100
Kuwait	40	24	16	1	1	0.1	--	--	18	100
Palestine	27	49	7	4	3	1	--	--	10	100
Egypt	24	26	2	7	0.5	1	--	--	40	100
Aggregate	42	24	9	5	2	1	0.0	0.1	18	100

- A majority of 61% of the Arab public supports making the Middle East a nuclear weapons-free zone, but opinion is more divided on the statement "**Israel's possession of nuclear weapons justifies the efforts of other states in the region to possess such weapons**".
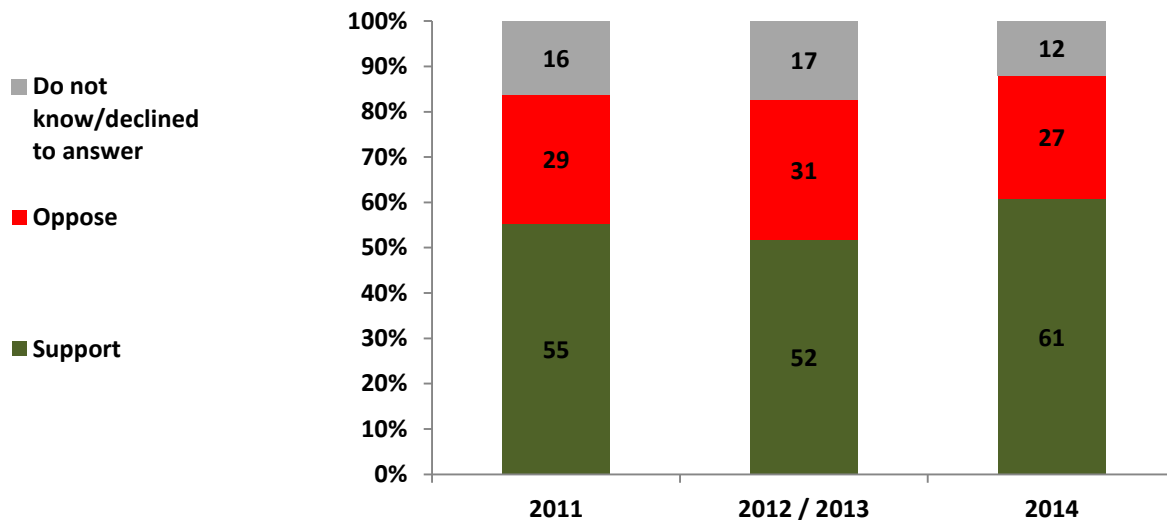
Figure 6- 6 Support for the statement "Israel's possession of nuclear weapons justifies the efforts of the other states in the region to possess such weapons".

The   Arab   Revolutions

Results from the 2014 Arab Opinion Index reflect how divided the Arab public is towards the Arab Spring: 45% believe that the revolutions of the Arab Spring and the concomitant developments were positive, while 42% regard these as negative.

- Respondents who regarded the Arab Spring positively explained their views by pointing out that the Arab revolutions had dismantled regimes which were corrupt and/or authoritarian; and that the Arab revolutions granted freedom of expression to the citizens of Arab countries, and reflect an awakening of the Arab peoples and a reclamation of their dignity and freedom of determination.

- Respondents whose views of the Arab revolutions were negative were not necessarily opposed to the Arab Spring, in principle. They cited the following as reasons behind their positions: the large toll of human losses and suffering; the revolutions' failure to realize their objectives; the spread of chaos and the lack of security; the destruction of states and state institutions; and the destabilization of certain countries which were crisis-stricken.
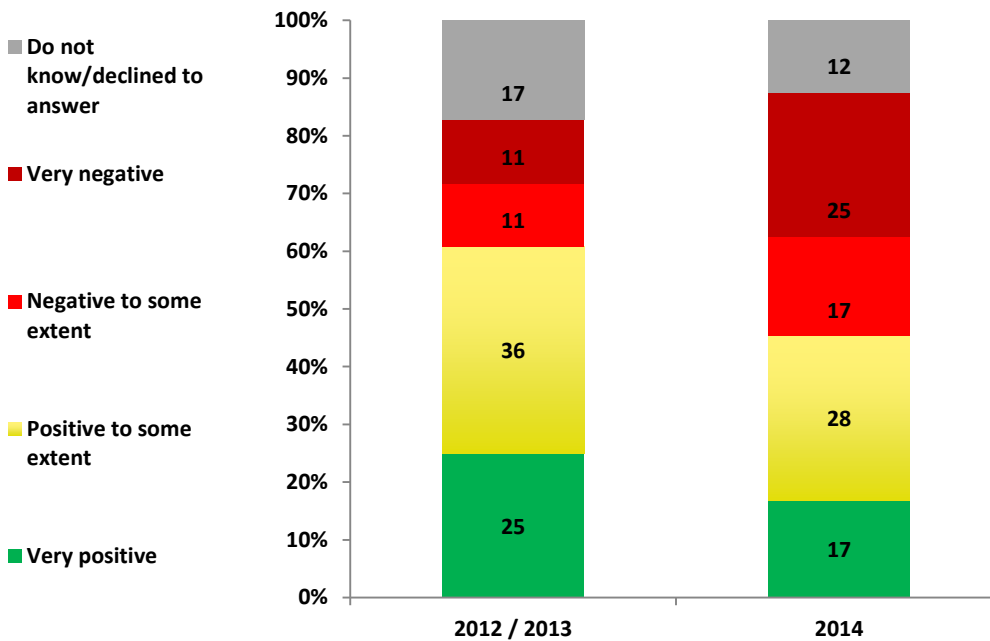
Figure 7- 1 Respondents' attitudes towards the Arab Spring varied across countries, and overall opinion was divided.

- Only 15% of respondents believe that the Arab Spring revolutions have achieved their aims in terms of securing public and political rights; the foundation of a basis for a democratic system of rule; respect for citizens' rights; combatting financial and administrative corruption; and the improvement of economic circumstances. Nevertheless, a slim majority of the Arab public believes that the revolutions of the Arab Spring will succeed in achieving these aims at some point in the future. Only 23% of respondents voiced the opinion that the Arab Spring revolutions will never achieve their aims.
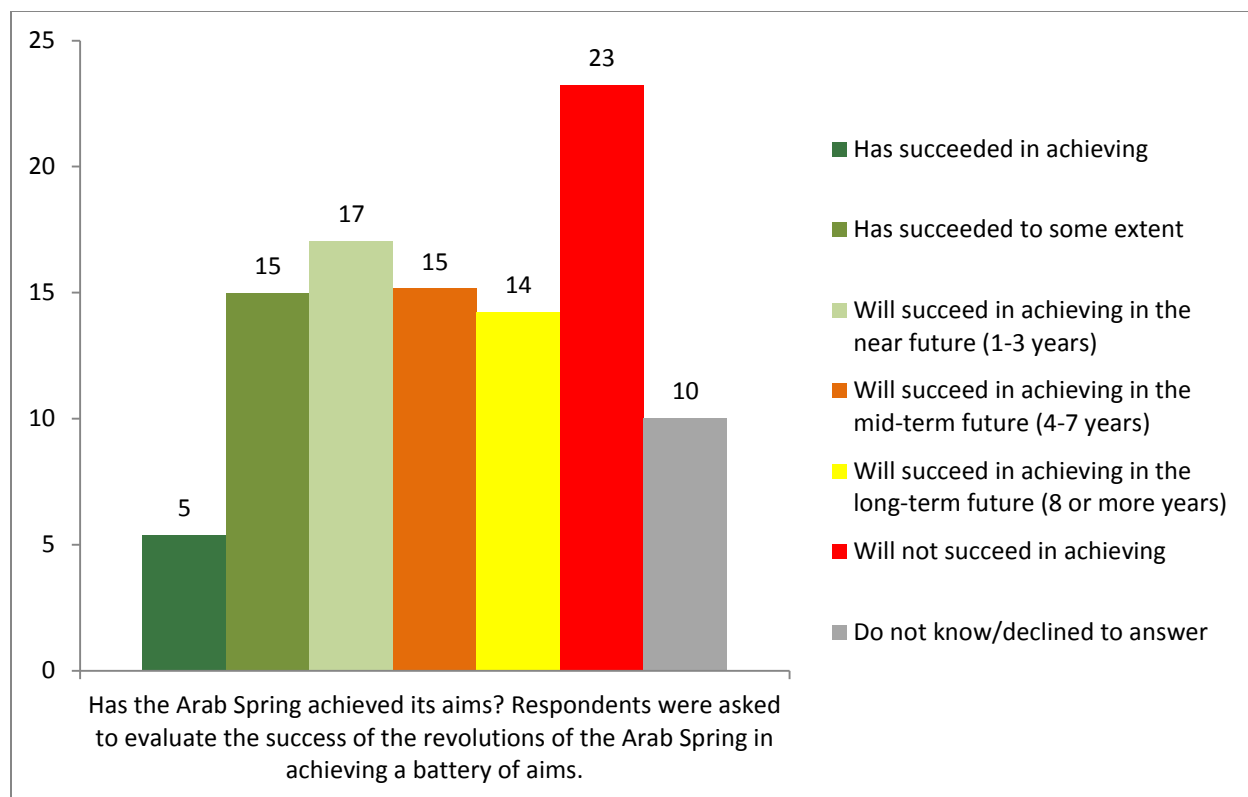
Figure 7- 2 Respondents were asked to evaluate the success, real or predicted, of the Arab Spring since 2011.

- The Arab public remains confident and optimistic with regards to the Arab Spring and its chances of success: 60% believe that while the Arab Spring is passing through a difficult phase, it will ultimately achieve its aims; this compares with a mere 17% who believe that the Arab Spring has ended, and that the old regimes have returned to power. Respondents indicated a number of factors as being responsible for the difficult phase through which the Arab Spring is passing at present, including: destabilized security situations; a deterioration of economic conditions; foreign intervention; the emergence of extremist movements; and agitation on the part of the former regimes and by state-controlled media.
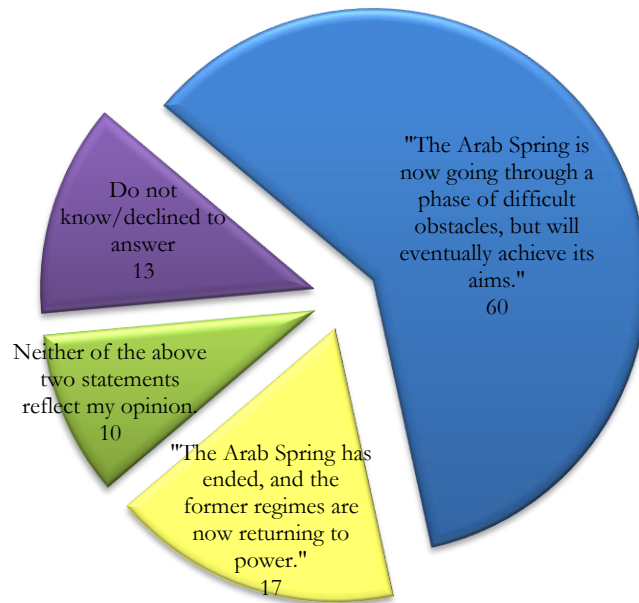
Figure 7- 3 A majority of the Arab public remains optimistic about the prospects for the eventual triumph of the Arab Spring.

- The Arab public expressed fears with regards to the rise to power of both Islamist and non-Islamist/secular political groupings: 43% of respondents indicated that they had fears regarding the increased influence of political Islamists, compared to 40% who said that they did not. For non-Islamist/secular political parties, these figures were 37% and 41%, respectively. Respondents gave clear and coherent explanations for such fears and, while it is true that there is a large group of respondents who fear both of these camps, the extent of these fears is indicative of the level of political polarization in Arab public opinion. The inability of Islamist and non-Islamist/secular political movements to cooperate is an obstacle to democratic transition, and will allow non-democratic institutions to exploit the publics' fears and push towards greater authoritarianism.
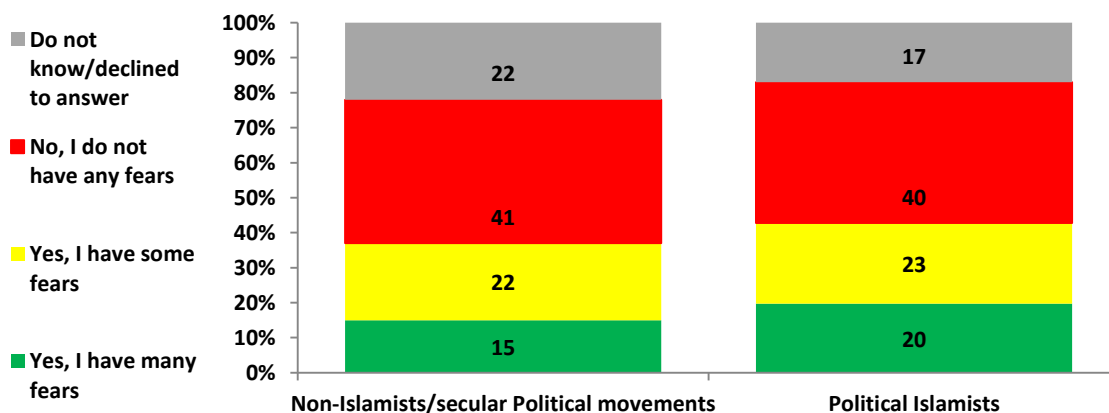

Figure 7- 4 Large proportions of the Arab publics have expressed fears towards the rise of both Islamist and non-Islamist/secular political parties.

- Fully 41% of the Arab public expressed their opposition to the deposition of elected President Mohammed Morsi of Egypt, viewing it as a military coup against the will of the people, and an affront to democratic legitimacy. Less than one-third of the respondents viewed the deposition of Morsi as a positive development,

and these latter tended to cite reasons such as limiting the influence of the Muslim Brotherhood, ending the country's political crisis/achieving safety and stability and fulfilling the wishes of the Egyptian people.

- The Arab public is more unanimous when it comes to Bashar al Assad, with 68% of respondents expressing varying degrees of support for the statement that "It would be better for Syria today if Bashar al Assad stepped down". The reasons cited by these respondents focused on his "tyranny", his dispossession of the Syrian people and that Assad represented to them the cause of the Syrian crisis.
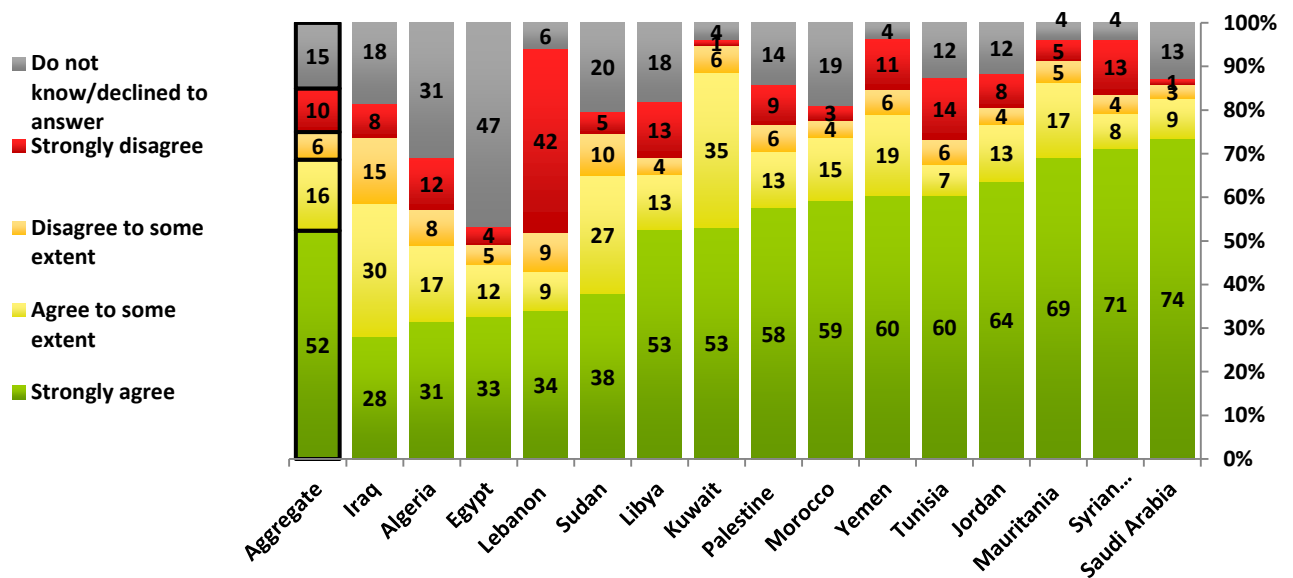

Figure 7- 5 There was agreement with the proposition that it would be better for Syria today if Bashar al Assad stepped down from power.