المركز العربي للأبحاث و دراسة السياسات
Arab Center for Research & Policy Studies

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Arab Public Opinion Program

Arab Opinion Index 2015

In Brief

The 2015 Arab Opinion Index: In Brief

The 2015 Arab Opinion Index is the fourth in a series of yearly public opinion surveys across the Arab world. The first survey within the Arab Opinion Index was conducted in 2011, using an aggregate sample of 16,192 respondents across 12 separate Arab countries. The 2012/2013 Arab Opinion Index relied on a sample of 20,372 respondents in 14 different Arab countries. The 2014 Arab Opinion Index was based on 21,152 respondents in 14 Arab countries. In addition, the 2014 survey included 5,466 Syrian refugee respondents living in refugee camps in Jordan, Lebanon, Turkey and in Northern Syria along the Turkish-Syrian border.

The 2015 Arab Opinion Index is based on the findings from face-to-face interviews conducted with 18,311 respondents in 12 separate Arab countries: Saudi Arabia, Kuwait, Iraq, Jordan, Palestine, Lebanon, Egypt, Sudan, Tunisia, Algeria, Morocco and Mauritania. Sampling followed a randomized, stratified, multi-stage, self-weighted clustered approach, giving an overall margin of error between +/- 2 % and 3% for the individual country samples. With an aggregate sample size of 18,311 respondents, the Arab Opinion Index remains the largest public opinion survey in the Arab world.

The sections below give selected highlights of the findings of the 2015 Arab Opinion Index.

Living Conditions of the Arab Citizenry

- Only 20% of respondents reported that their household incomes was sufficient for them to make savings after all of their necessary expenditures were covered. A further 48% reported that while their household incomes were sufficient to cover necessary expenditures, they could not make any savings (these families are designated as those living "in hardship"). Fully 29% of citizens in the Arab region live "in need", in that their household incomes do not cover their necessary expenditures.

- Respondents' reporting on questions related to their household incomes, expenditures and living conditions did not differ significantly across any of the successive surveys of the Arab Opinion Index.

- Of those respondents whose households live "in need", 53% resort to borrowing from a variety of sources to cover their expenditures. Twenty percent of families living in need rely on assistance from friends and family, while 9% rely on support from either charitable organizations or from government-supported institutions. This suggests that informal support networks remain more crucial to Arab households than institutional support networks (whether supported by the state or otherwise).

- In contrast, 43% evaluate their home countries' economic situations positively, compared to 56% who have an overall negative view of their home countries' economic circumstances.
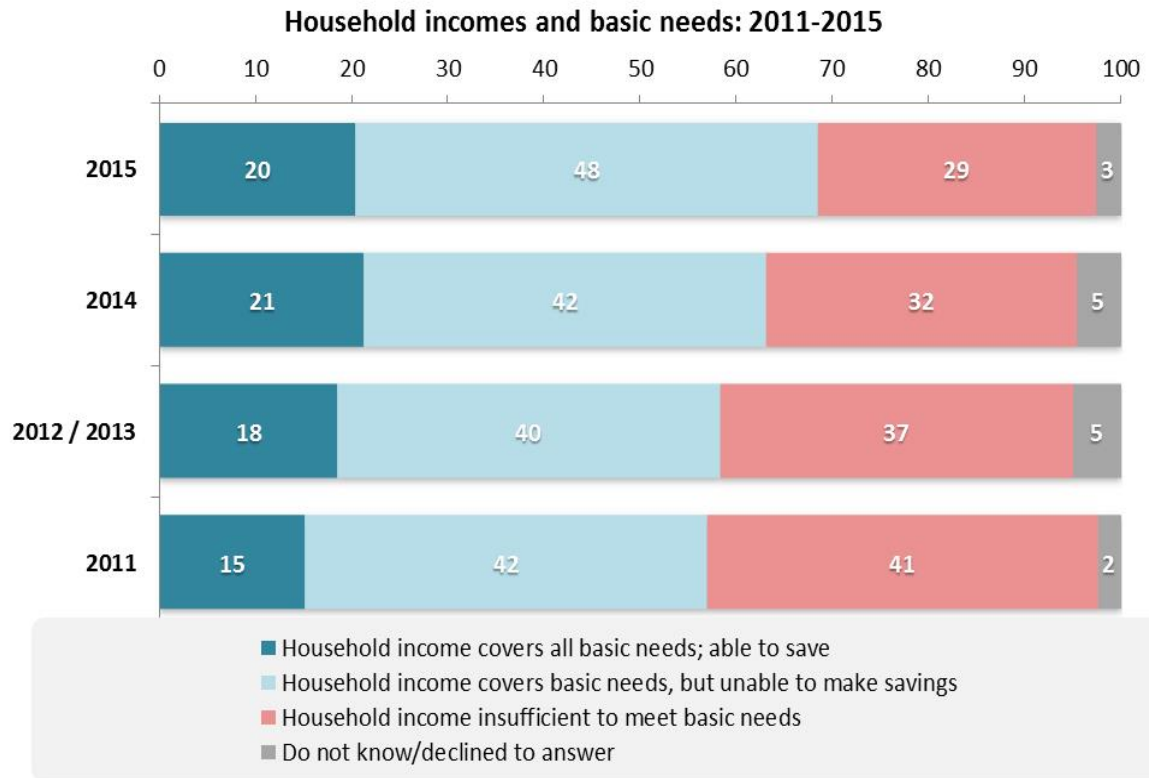
Household incomes and basic needs: 2011-2015

Year	Covers all; able to save	Covers basic needs, no savings	Insufficient	Don't know
2015	20	48	29	3
2014	21	42	32	5
2012 / 2013	18	40	37	5
2011	15	42	41	2

Legend:
- Household income covers all basic needs; able to save
- Household income covers basic needs, but unable to make savings
- Household income insufficient to meet basic needs
- Do not know/declined to answer

Figure 1.1 Results from the Arab Opinion Index show a decrease in the number of Arab households living in need since 2011.

Figure 1.2 Respondents have a generally negative outlook on their home countries' economic conditions.
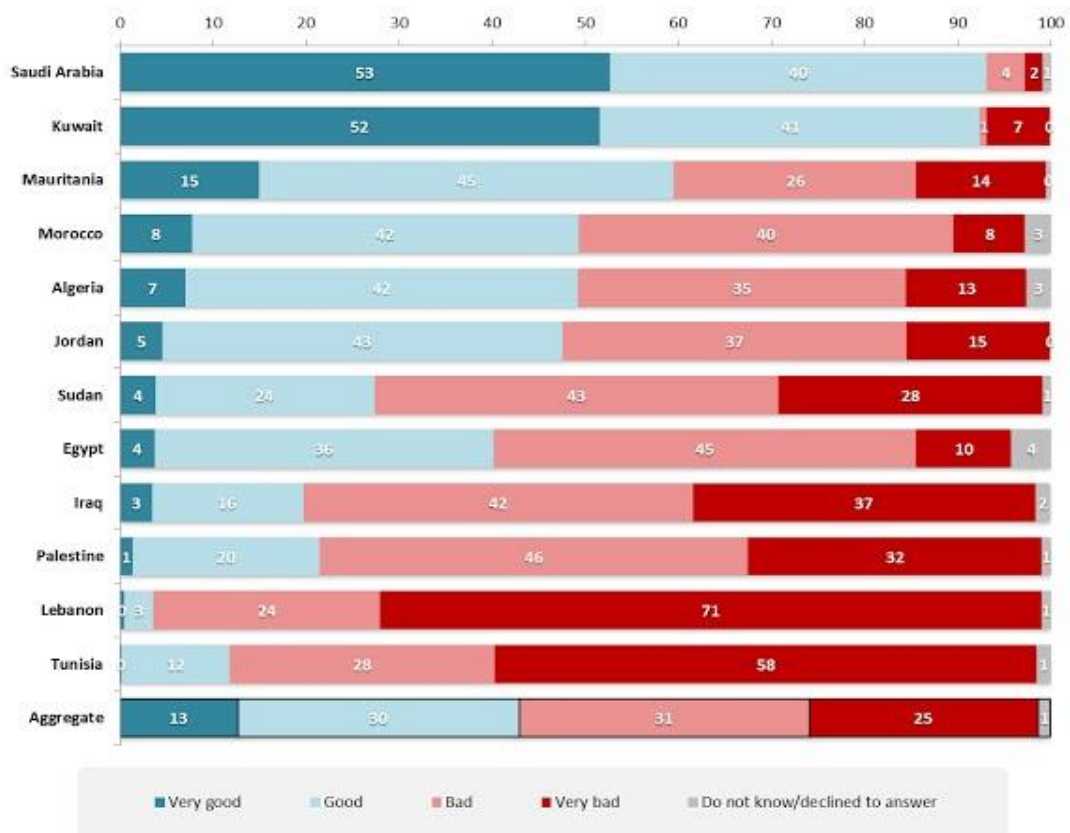
Respondents' evaluations of their home countries' economic conditions

- Meanwhile, 53% of respondents evaluate the level of security in their home countries positively, while 46% view the level of security in their home countries negatively. When compared to the results from the 2014 and 2012/2013 surveys, this indicates a marked increase in the level of respondent-reported satisfaction with the level of security, across the entire Arab region.

- Equally, 43% of respondents evaluated the political situations within their home countries positively, compared to 52% who had negative views of their home countries' political situations. Yet, these figures represent an increase in the number of Arab citizens who view their home countries' political circumstances positively.

- Fully 23% of Arabs report a desire to emigrate from their home countries. While a desire for economic improvement was the most cited incentive to emigrate across the Arab countries surveyed, one-fifth of would-be emigres cited political reasons and concerns over safety and security as the reason behind their wish to leave. These results are highly dependent on the respondent's home country: 95% of would-be emigres in Jordan (19% of the population) cited economic motivations for wanting to leave home, but more than two-thirds of Iraqis who want to emigrate (23% of Iraqis) had a lack of safety and security as their main concern.

- Results from the 2015 Arab Opinion Index confirm findings from last year's survey, and demonstrate that safety and security are of growing importance to Arab citizens: for the second year running, "safety and security" in their home countries is the pressing concern most frequently cited by respondents (19% in 2015, 20% in 2014). This compares to the findings of the 2011 and 2012/2013 polls, in which unemployment was the most-cited challenge which respondents reported their home countries faced.

Figure 1.3 The Arab public views their home countries' political situations to be generally negative.

Respondents' evaluations of the political situation in their home countries.

■ Very good   ■ Good   ■ Poor   ■ Very poor   ■ Do not know/declined to answer
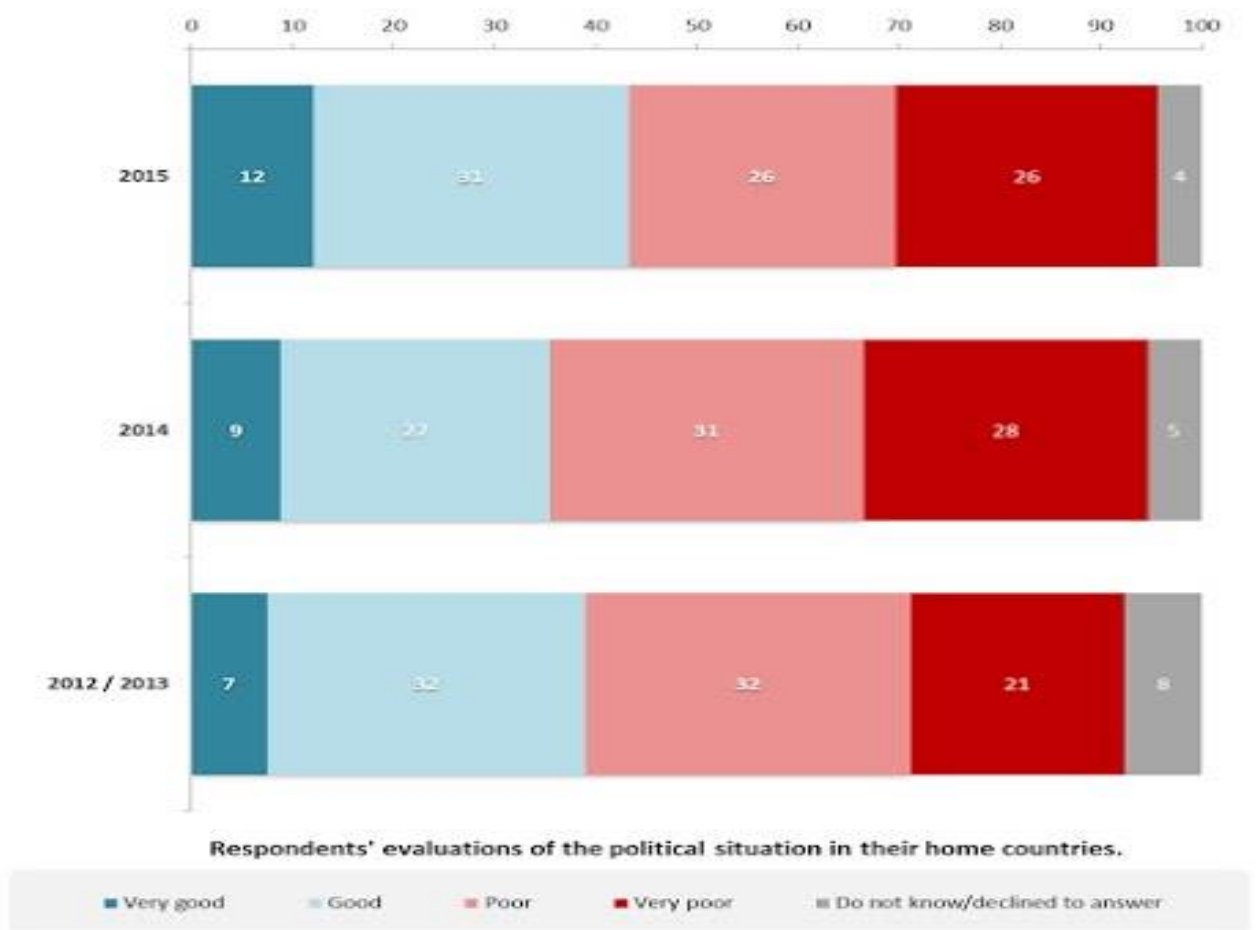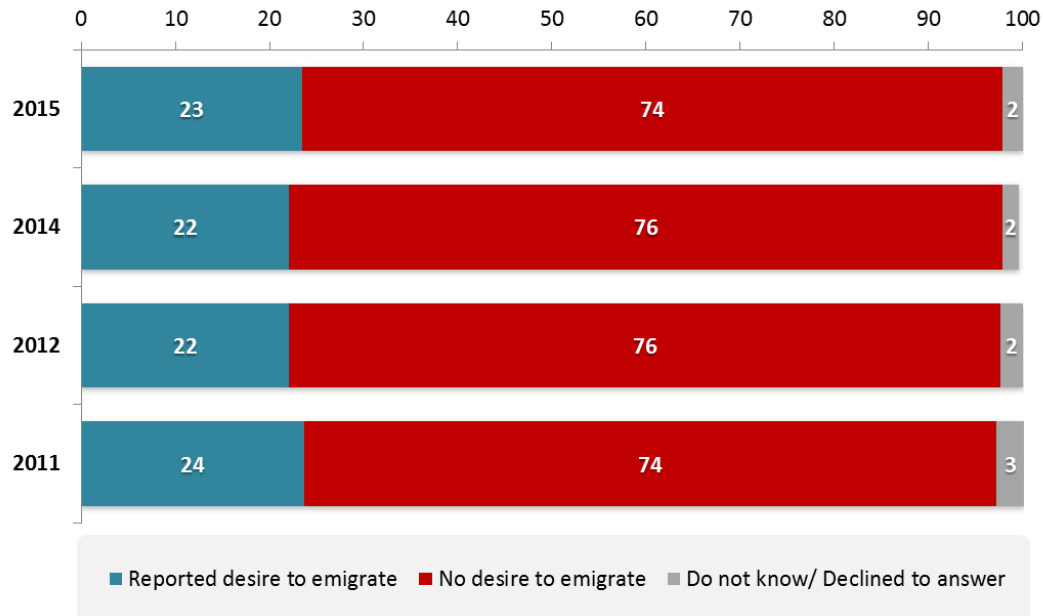
Figure 1.4 Roughly one fifth of the Arab people want to emigrate. While the proportion of those who want to leave home has remained generally stable over the last few years, the factors behind this vary.

Respondents' reported desire to emigrate: Arab Opinion Index over successive years.

- Respondents in the Arab region provided a variety of different answers when asked to name the country which posed the single largest threat to their home countries' national security. With 27% of respondents in the aggregate sample, including large concentrations of respondents in Palestine, Lebanon, Egypt, Mauritania, Jordan and Sudan, Israel was the most cited threat to the national security of their home countries. The second most-cited country was Iran, which 12% of Arabs viewed as the country posing the largest threat to their home countries' national security, although this number grows to over one-half of respondents in Saudi Arabia, and nearly a third of respondents in Iraq and Kuwait. Finally, 11% of Arab citizens view the United States as the country which poses the largest threat to their own countries' national security. This includes 11% of Kuwaiti respondents.

Arab Citizens' Views of State Institutions and Governmental Effectiveness

- Results from the 2015 Arab Opinion Index indicate that confidence in governmental and state institutions is varied across the Arab world. While respondents indicated a high level of confidence in military and security agencies (including the military, police forces and state security/intelligence services), citizens showed less confidence in their countries' three branches

of government: executive, legislative and judicial. Respondents showed the least amount of confidence in their countries' legislatures and political parties. No more than approximately one half of the Arab public believes that their countries' legislatures effectively carry out parts of their mandates: oversight of the state budget (50%); holding the executive to account (53%); enacting legislation which protects citizens' liberties (51%); or taking the interests and concerns of all societal groups into consideration (50%).

Figure 2.1 The Arab public places a great level of trust in their countries' militaries, but considerably less so in other state institutions.
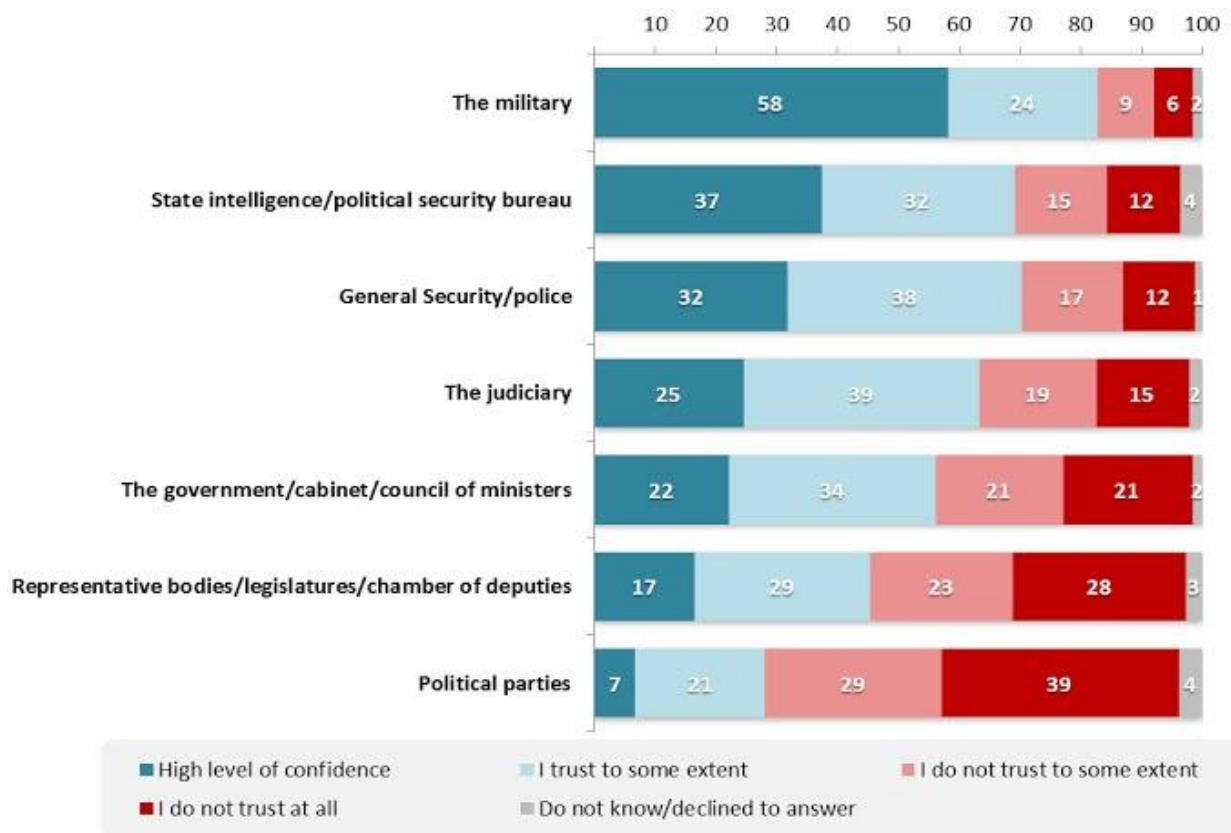
The state institutions in which respondents had the most trust.

- In line with previous surveys of the Arab Opinion Index, respondents generally tended to evaluate their governments negatively on matters of foreign policy, economic policy and on a battery of other domestic policies and services. Satisfaction levels for a variety of policy areas in the countries surveyed ranged from 43% to 50%.

- On a specific point, there is a near-unanimous belief among the Arab peoples that their countries are plagued by corruption: nearly 92% of respondents answered that corruption in their home countries was either "very widespread", "widespread" or "widespread to a limited extent". This contrasts with a mere 6% of the Arab public which does not believe that corruption is at all prevalent in their home countries. These figures are consistent with results from earlier surveys within the Arab Opinion Index, indicating that there has been little to no change in public

perceptions of corruption in the Arab world. Respondents' opinions were more equally divided, meanwhile, when asked about the extent of the sincerity of their governments in tackling corruption.

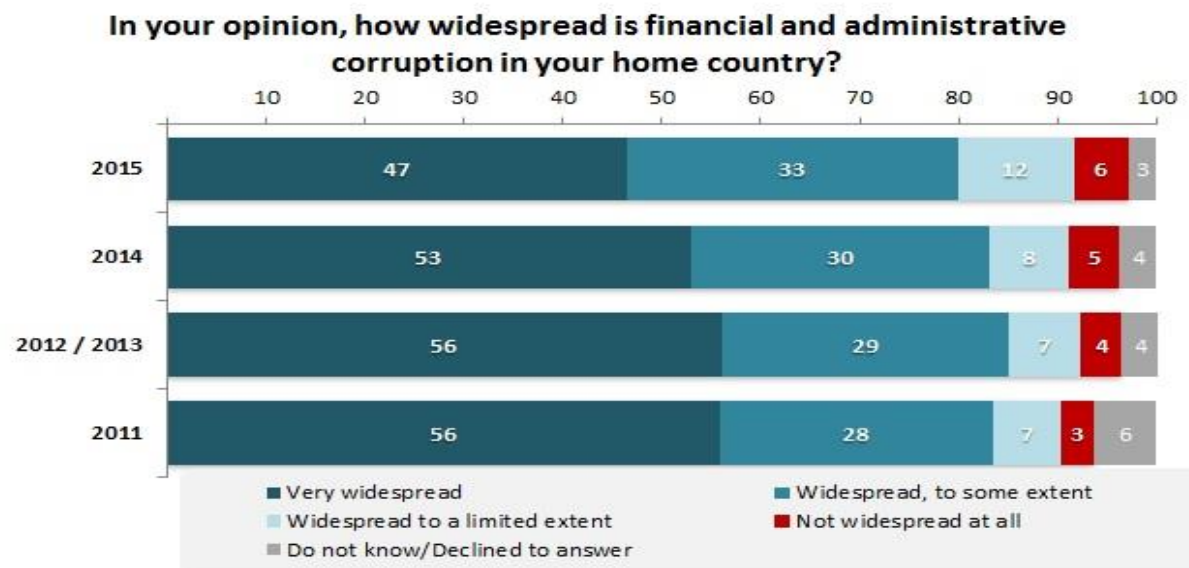**Figure 2.2** Respondents generally held dim views of their countries' legislatures.

Respondents' views of the effectiveness of their home countries' legislatures/representative chambers of deputies.
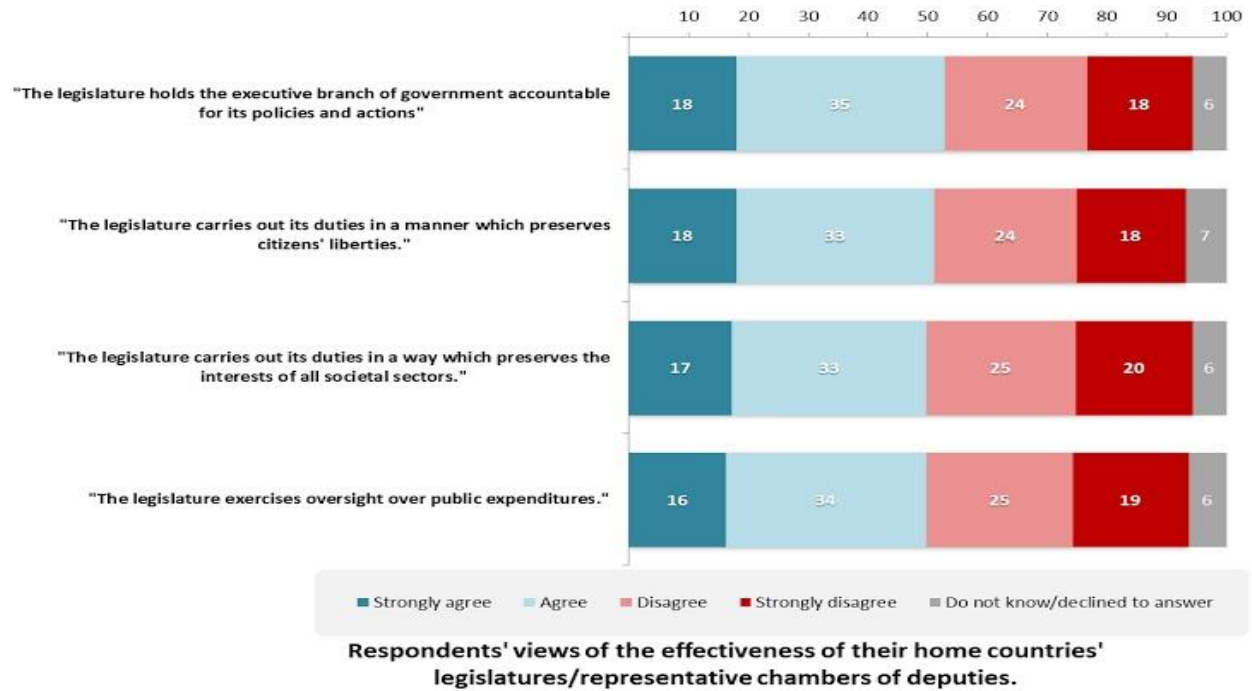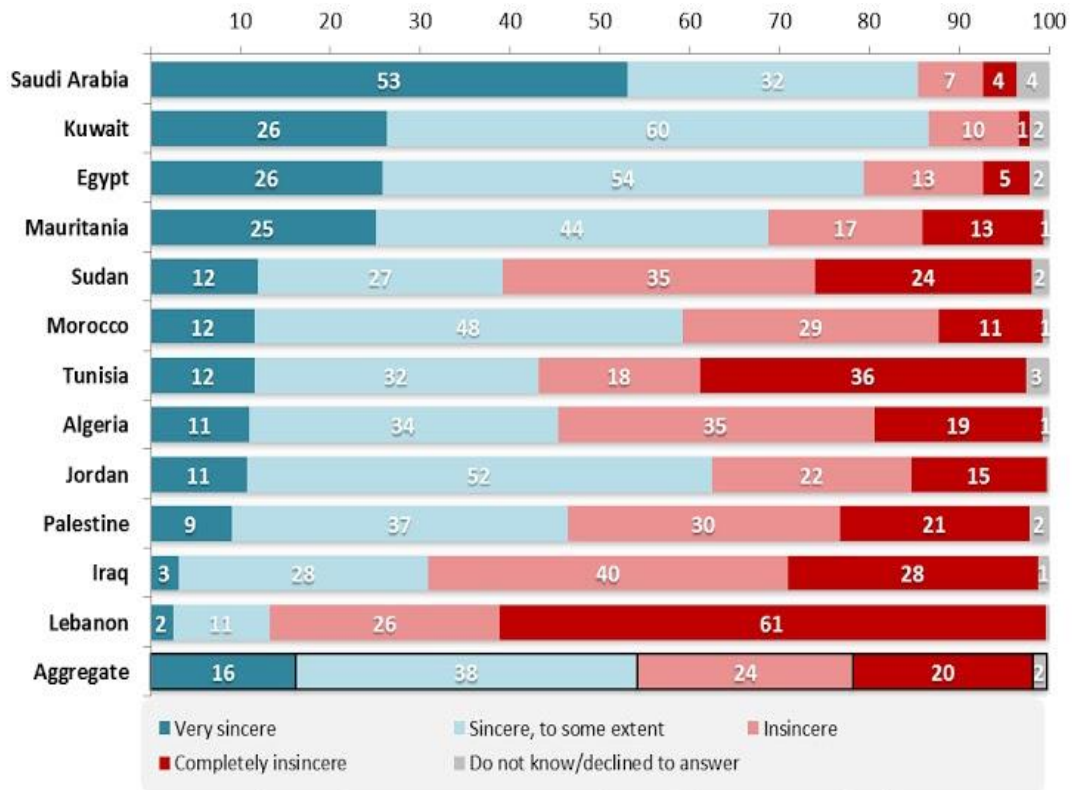

Figure 2.3 Respondents reported perceptions of the prevalence of administrative and/or financial corruption in their home countries.

Figure 2.4 With the exception of Saudi Arabia, Kuwait, Egypt and Mauritania most Arabs are not convinced that their governments are serious in tackling corruption.

How sincere is your government in tackling corruption?

- Similarly, Arab public opinion has a negative outlook of the equal treatment of citizens or for the opportunity which those citizens have to receive a fair trial. Only 25% of Arabs believe that the law is applied fairly to all citizens of their home countries. Meanwhile, 54% believed that while the state did apply the rule of law, it gave preferential treatment to some groups over others. Fully 21% expressed the opinion that the state completely did not apply the rule of law. Respondents showed a slightly more positive outlook in terms of their expectation that citizens of their countries would receive a fair trial: 58% believed that the principle of a fair trial was applied in their home country, while 41% believed that trials in their home countries were not fair. Here again, results were highly dependent on home country, with Kuwaitis much more prepared to believe (93%) that the judicial system in their country was fair compared to Lebanese (19%).

With regards to the state's application of the rule of law between citizens, which of the following statements is closest to your opinion?
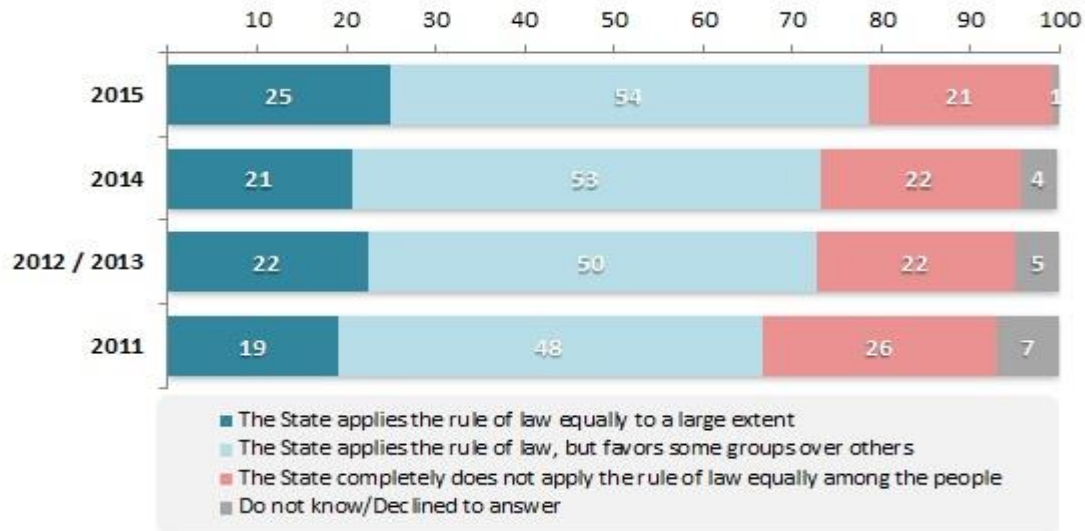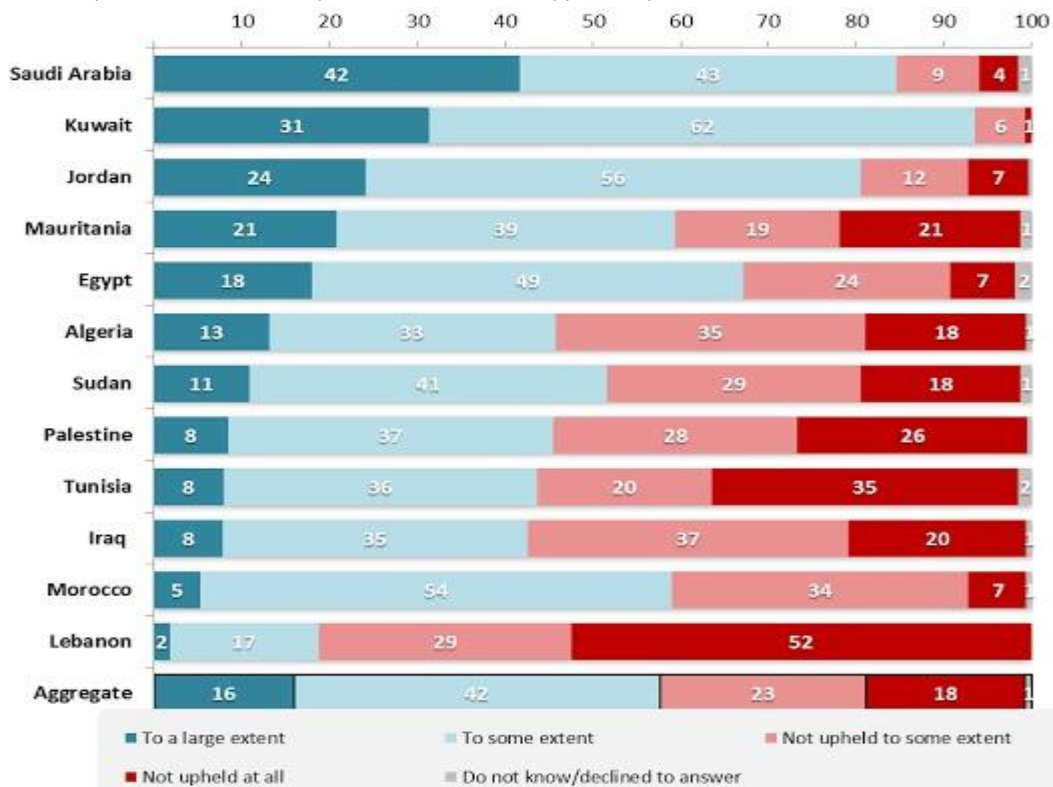

- The State applies the rule of law equally to a large extent
- The State applies the rule of law, but favors some groups over others
- The State completely does not apply the rule of law equally among the people
- Do not know/Declined to answer

Figure 2.5 Only 25% of the Arab public believes that the rule of law applies equally to all citizens in their home countries

Figure 2.6 Respondents were not optimistic about their opportunity to secure a fair trial in their home countries.

- To a large extent
- To some extent
- Not upheld to some extent
- Not upheld at all
- Do not know/declined to answer

To what extent do you believe that the principle of a fair trial is upheld in your country?

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Arab Public Attitudes towards Democracy

- Respondents to the 2015 Arab Opinion Index define democracy in a variety of different ways. An overwhelming majority of 89% provided clear, meaningful definitions of democracy: 35% of the overall group of respondents gave answers which emphasized the safeguarding of citizens' political and civil liberties; 26% defined democracy as the guaranteeing of equality and justice between citizens; and equal numbers (6% each) gave answers that emphasized either safeguarding safety and security or the improvement of economic conditions. Overall, the Arab publics are supportive of democracy: 72% of respondents are in favor of democracy, in contrast to 22% of respondents, who are opposed to democracy.

Arab Respondents' Definitions of Democracy

Figure 3.1
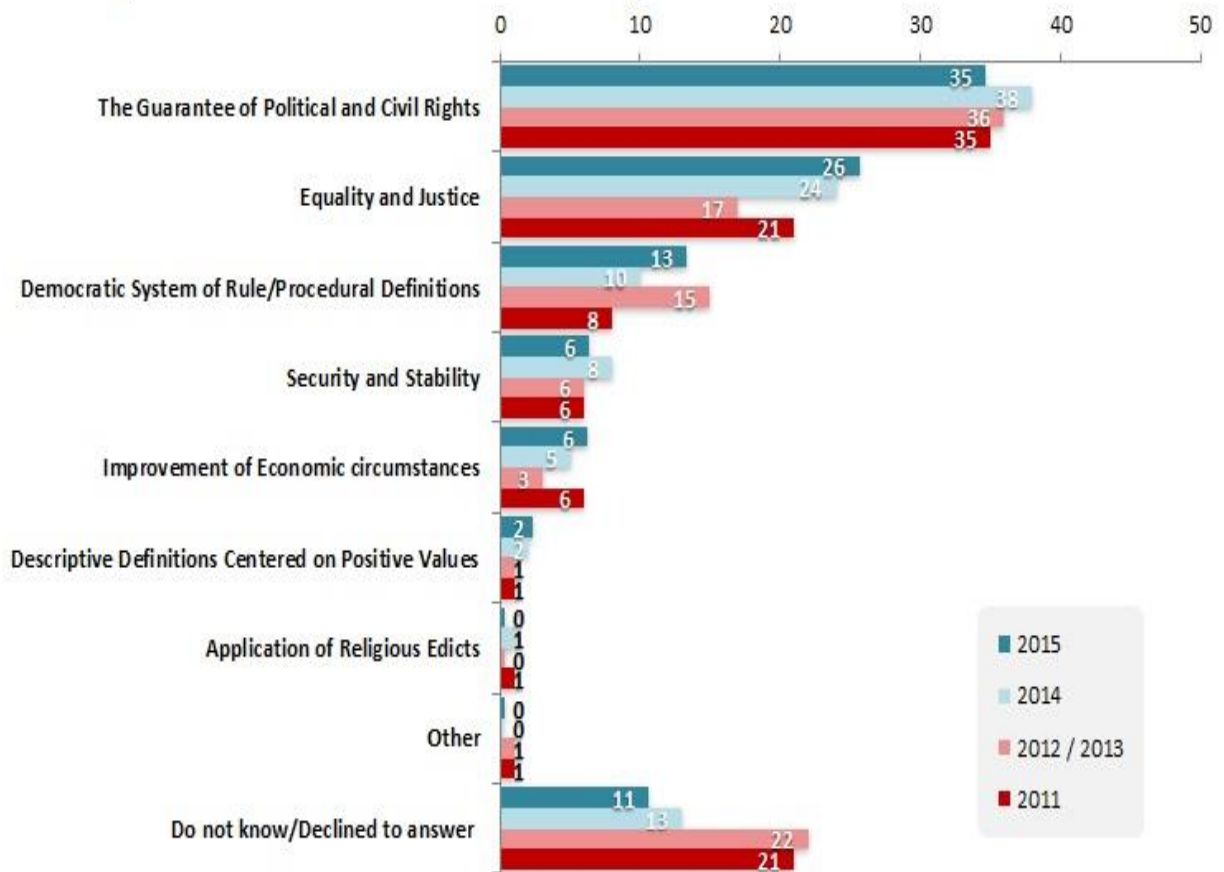
Figure 3.2

Respondents' opposition to and support for a variety of statements on democracy.

Figure 3.3

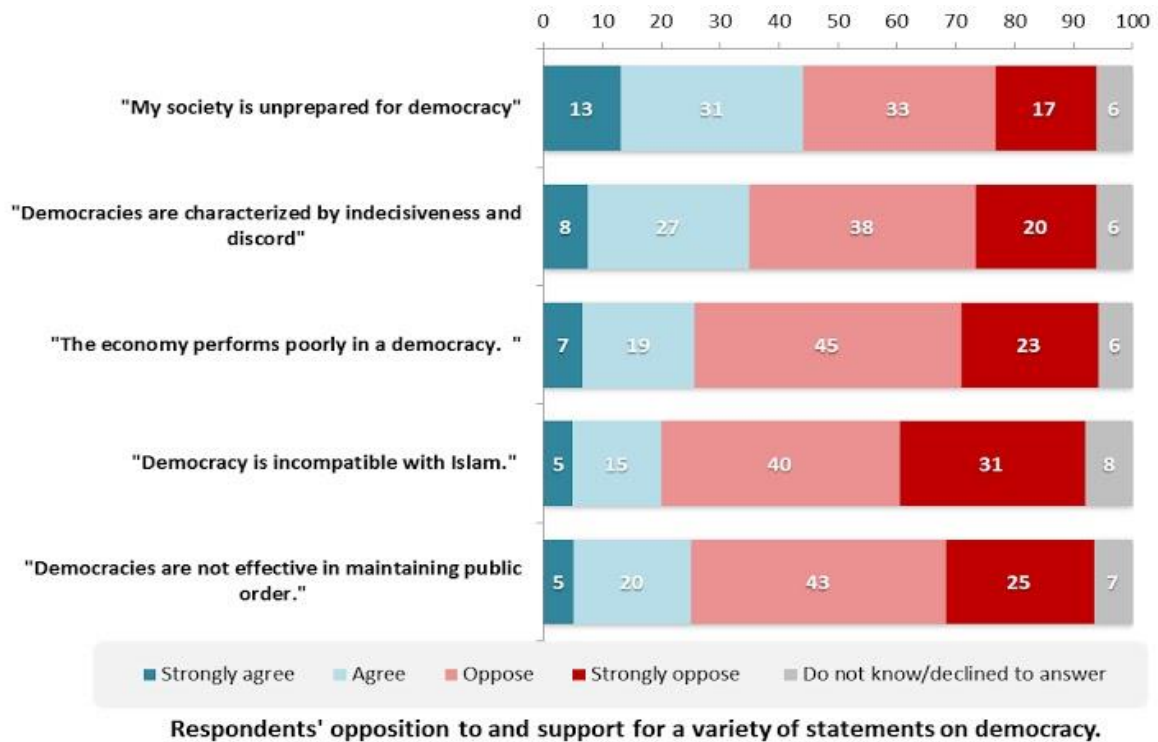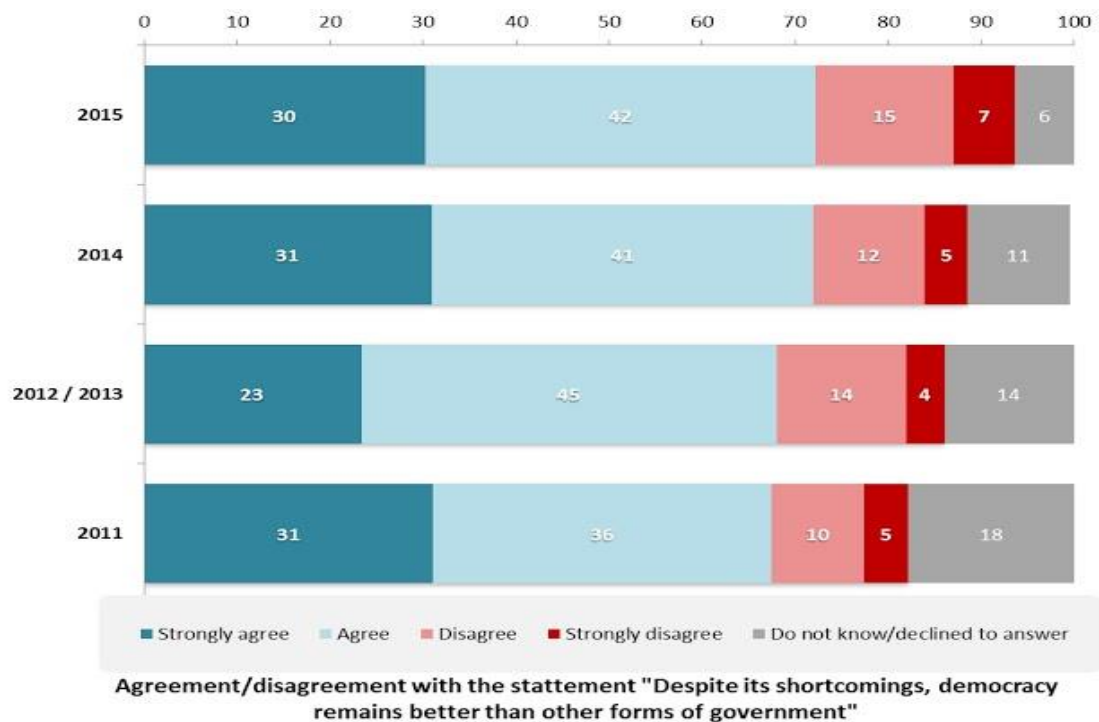Agreement/disagreement with the stattement "Despite its shortcomings, democracy remains better than other forms of government"

- A further 79% of Arabs believe that democracy is the most appropriate system of government for their home countries, when asked to compare democracy to other types of rule, such as authoritarian regimes or representative democracies where electoral competition is limited to either Islamist or non-Islamist/secular political parties, or to theocracies.

Varying levels of appropriateness for different types of systems of rule; respondents' options.
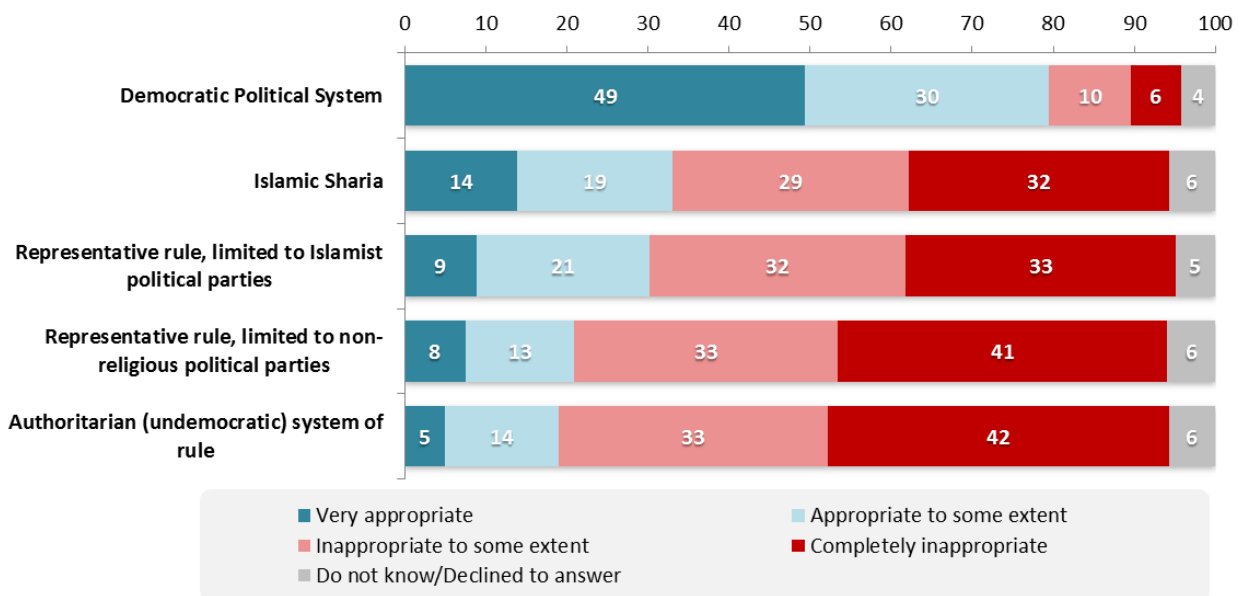

Figure 3.4 When compared to other types of government, democracy was chosen by Arab respondents as the most appropriate for their home countries.

- A majority of 55% of Arab citizens would accept an electoral victory and rise to power of a political party which they disagreed with, while 40% stated that they would be opposed to the ascendancy of a political party with which they disagreed through the ballot box.

- Overall, 62% of the Arab public would accept the electoral rise to power of an Islamist political group, provided it had an electoral mandate. This compares to one third of respondents who stated that they were opposed to the electoral rise to power of an Islamist political party. Meanwhile, Arab public opinion remains more divided (in nearly equal measure) on the question of an un-Islamic/secular party rising to power through elections.

Would you agree or disagree with one of the following groups coming to power through winning enough votes in free and fair elections?
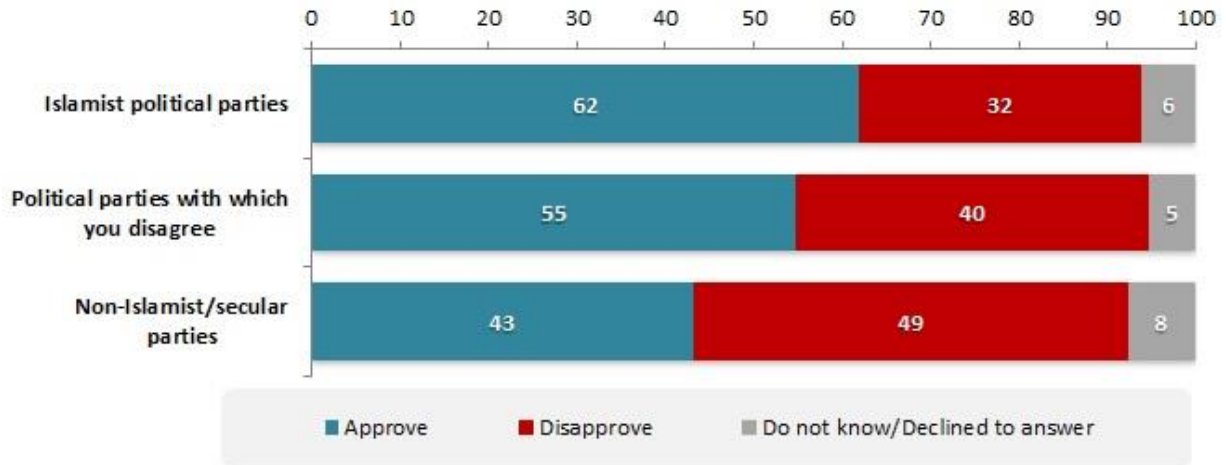

Figure 3.5 The Arab public would approve, in principle, of an Islamist political party coming to power through the ballot box.

What Respondents say: would you accept a political party with which you disagree coming to power through the ballot box?

Figure 3.6

- When asked to rate the level of democracy within their home countries on a numeric scale from 1 to 10 – with 1 being "completely undemocratic" and 10 being "democratic to the greatest extent possible" – respondents' evaluations in their home countries varied and ranged greatly, from as high as 6.9 in Kuwait to as low as 4.3 in Sudan, resulting in an average score of 5.5 for the aggregate sample. This score shows no statistically significant change since the beginning of the Arab Opinion Index in 2011.

- Nonetheless, when asked if the citizens of their home country were free to criticize their government without fear of retribution, 38% of the Arab public said no. Indeed, in some countries, such as in Sudan and in Egypt, outright majorities expressed the view that they were not free to openly criticize their own governments without fear.
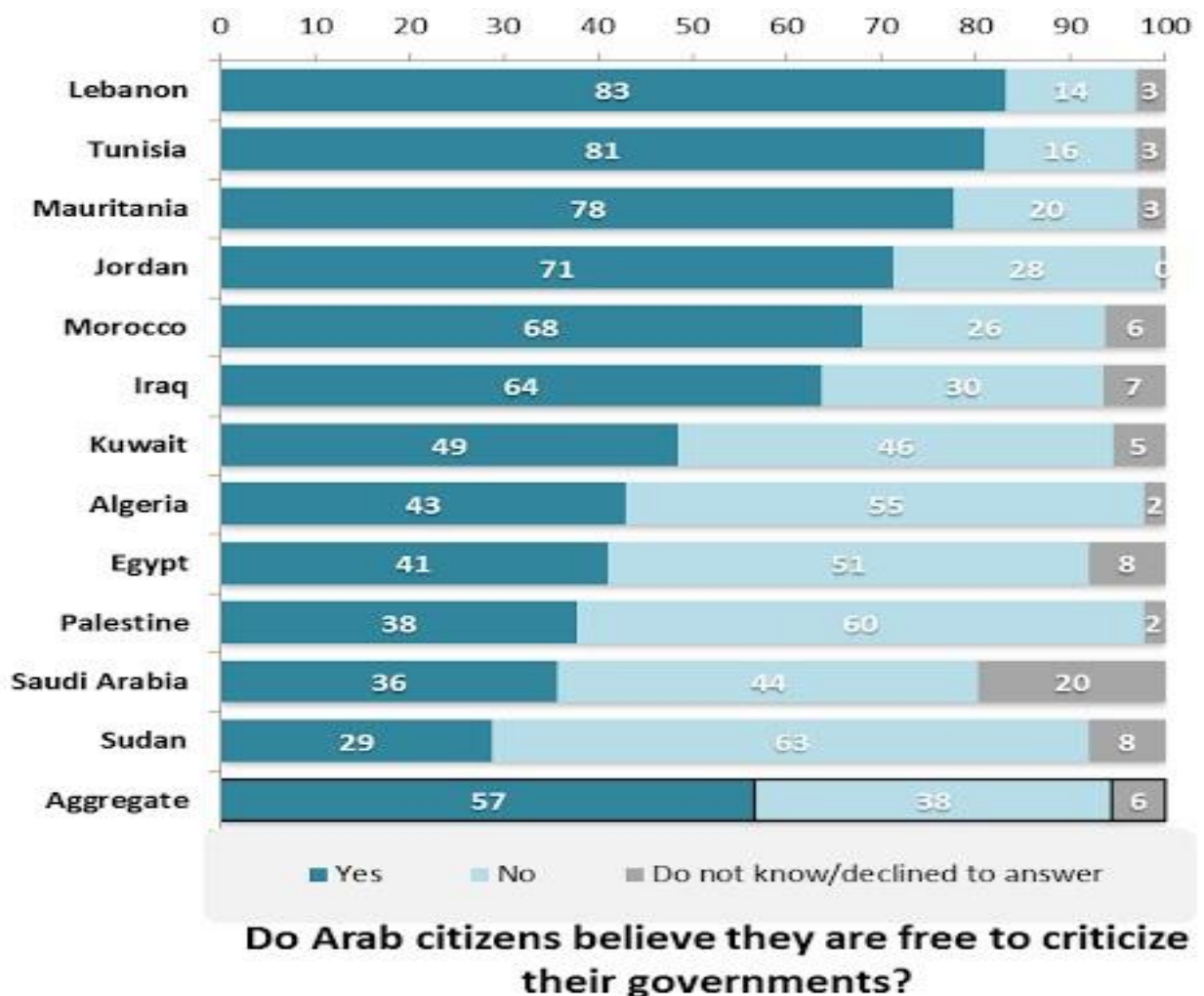

Do Arab citizens believe they are free to criticize their governments?

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Civic and Political Participation

- A majority of respondents to the 2015 Arab Opinion Index report being interested in the political affairs of their home countries. Compared to previous surveys conducted as part of the Arab Opinion Index since 2011, this year's findings show an increase in the proportion of respondents who reported being either "interested" or "very interested" in their home countries' political affairs.

The level of interest in political affairs among Arab citizens
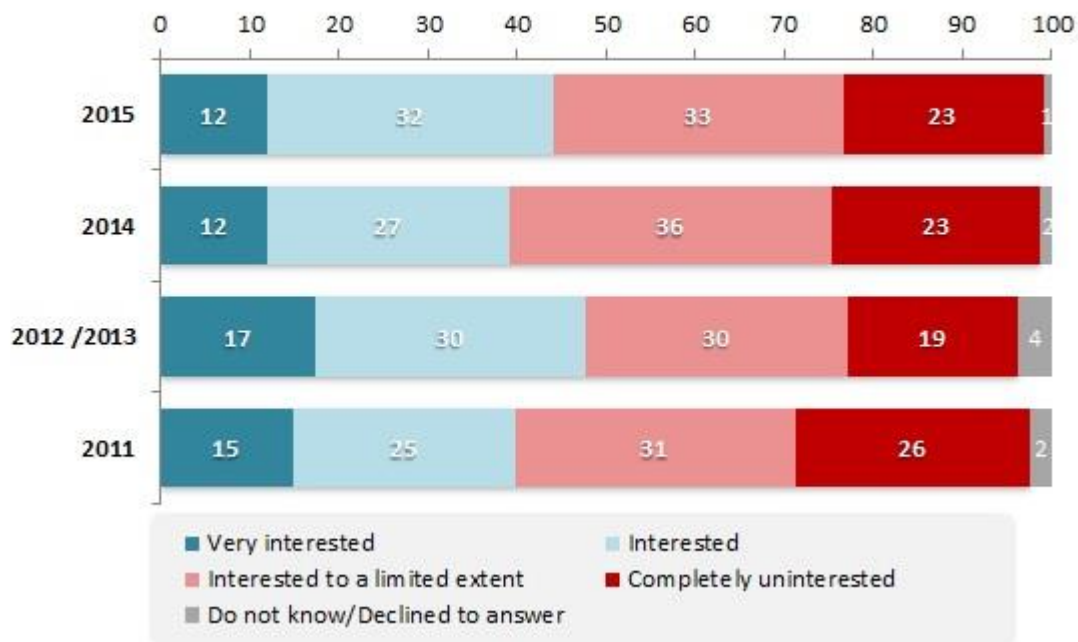
Figure 4.1

- A large majority of respondents (74%) report that they rely on television as their main source of news on political affairs. Television is followed in importance by the internet (11% of respondents), radio (7%) and (both electronic and print editions of) daily newspapers (5%).

- Across individual Arab countries, state (official) broadcasters were the most popular source of television news, with 16.3% of respondents citing it as their primary source of political news. This was followed by Al Jazeera, with 12.3% of respondents reporting it as their primary news source, and Al Arabiya, with 7.7% of respondents.

Arab respondents' preferred sources of political information/news
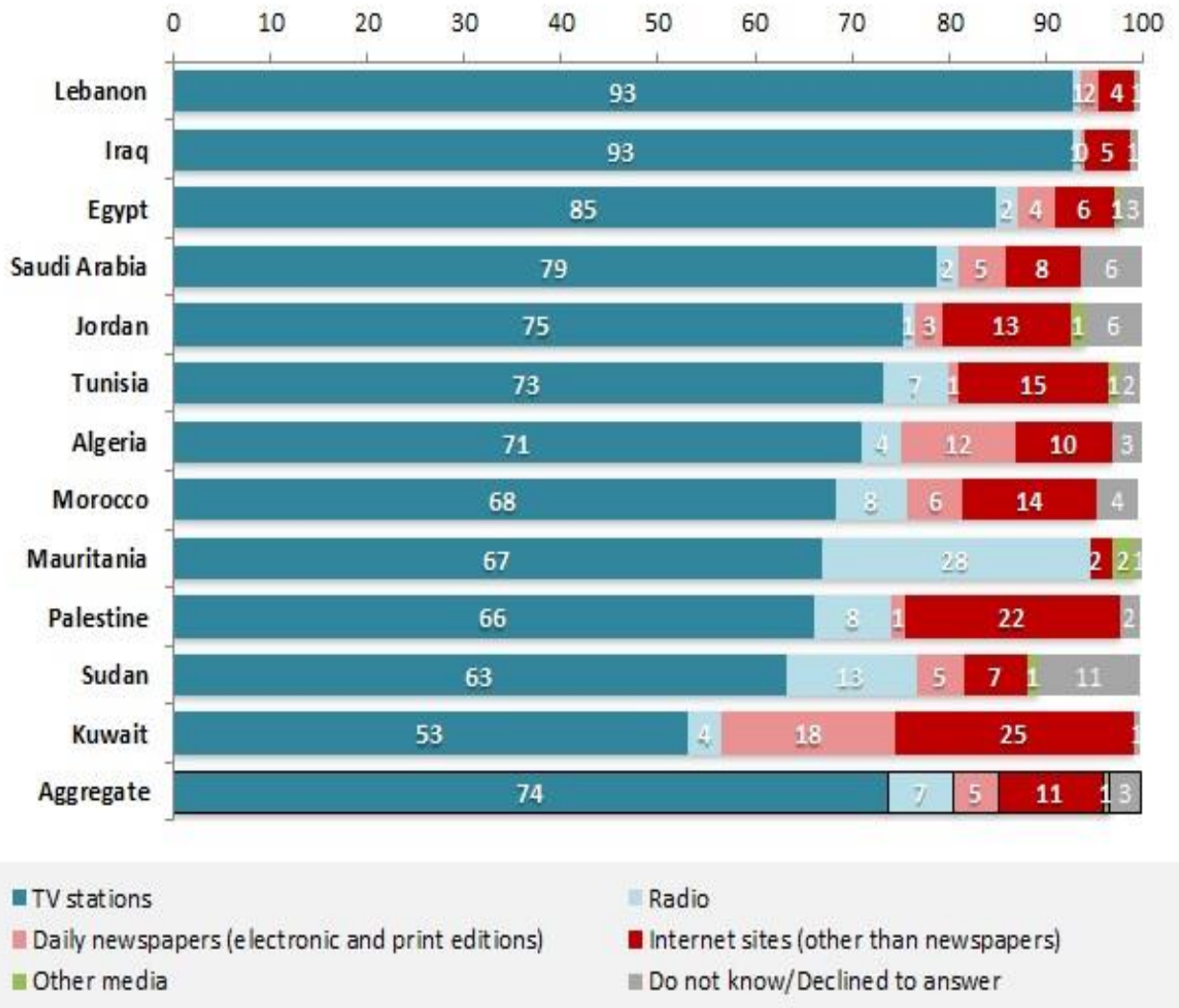
Figure 4.2

- The 2015 Arab Opinion Index shows a marked increase in levels of internet usage in the Arab world, with 61% of respondents reporting that they use the internet, in varying levels of frequency (compared to 50% in 2014, and 42% in 2012/2013).

- Only 38% of respondents to the 2015 survey report not using the internet.

Figure 4.3 Levels of internet usage in the Arab world vary greatly by country.
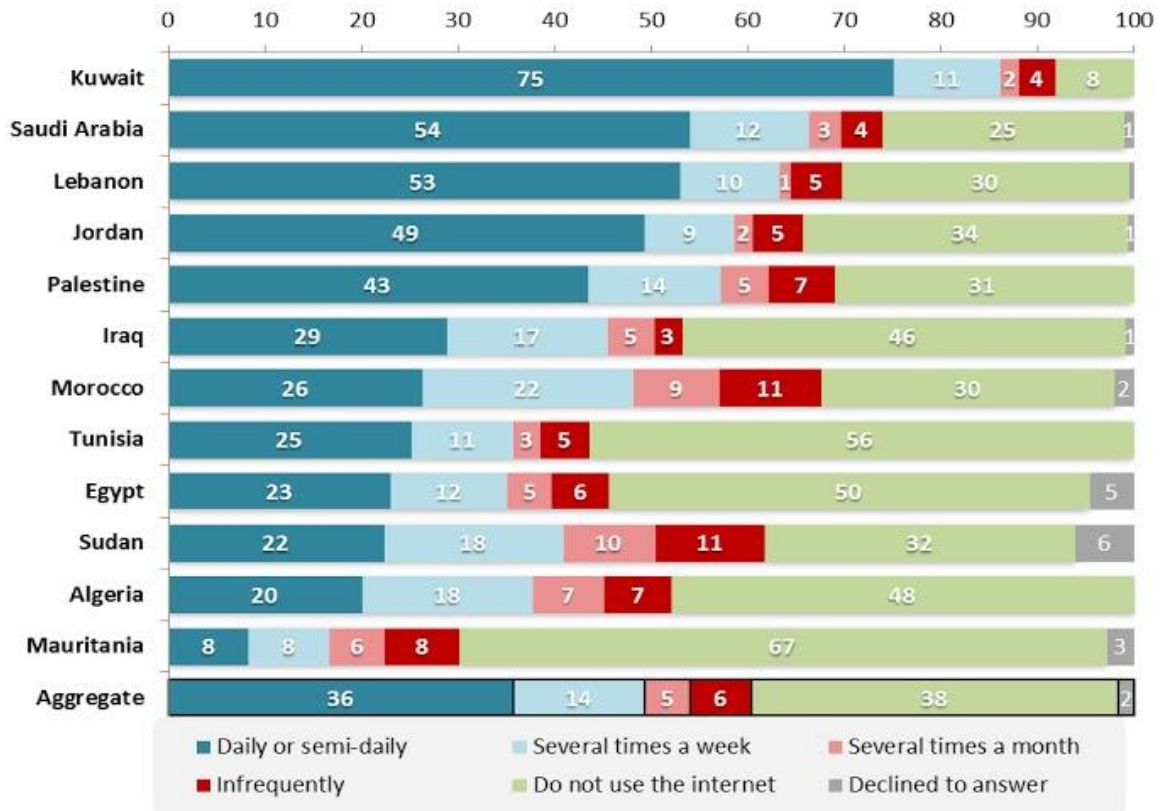
Frequency of internet use in the Arab world by country.

Legend:
- Daily or semi-daily
- Several times a week
- Several times a month
- Infrequently
- Do not use the internet
- Declined to answer

Frequency of internet use in the Arab world in the past three years

Legend:
- Daily or semi-daily
- Several times a week
- Several times a month
- Rarely (Infrequently)
- I do not use the internet
- Do not know/Declined to answer
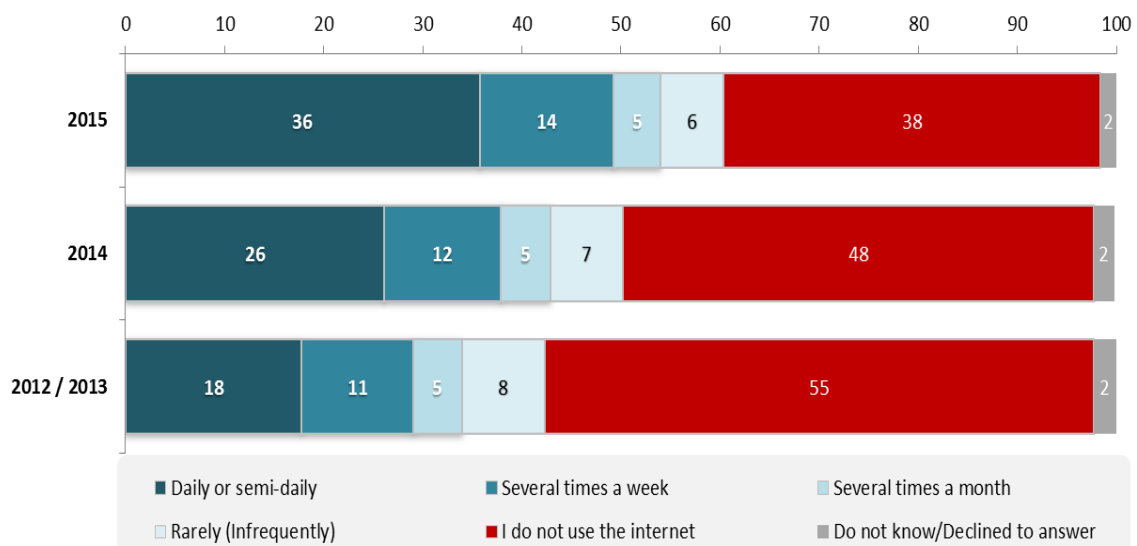
Figure 4.4 The results from this year's survey show increased rates of internet usage, with daily and semi daily users increasing in proportion.

- The vast majority of respondents who report using social media: 78% of Arab internet users have a facebook account, while 34% have an account on Twitter. Most of these users report using their social media accounts to engage in political affairs.

Figure 4.5 Social media is an important venue for public discussion in the Arab world, and many of those who use the internet are active on Twitter.
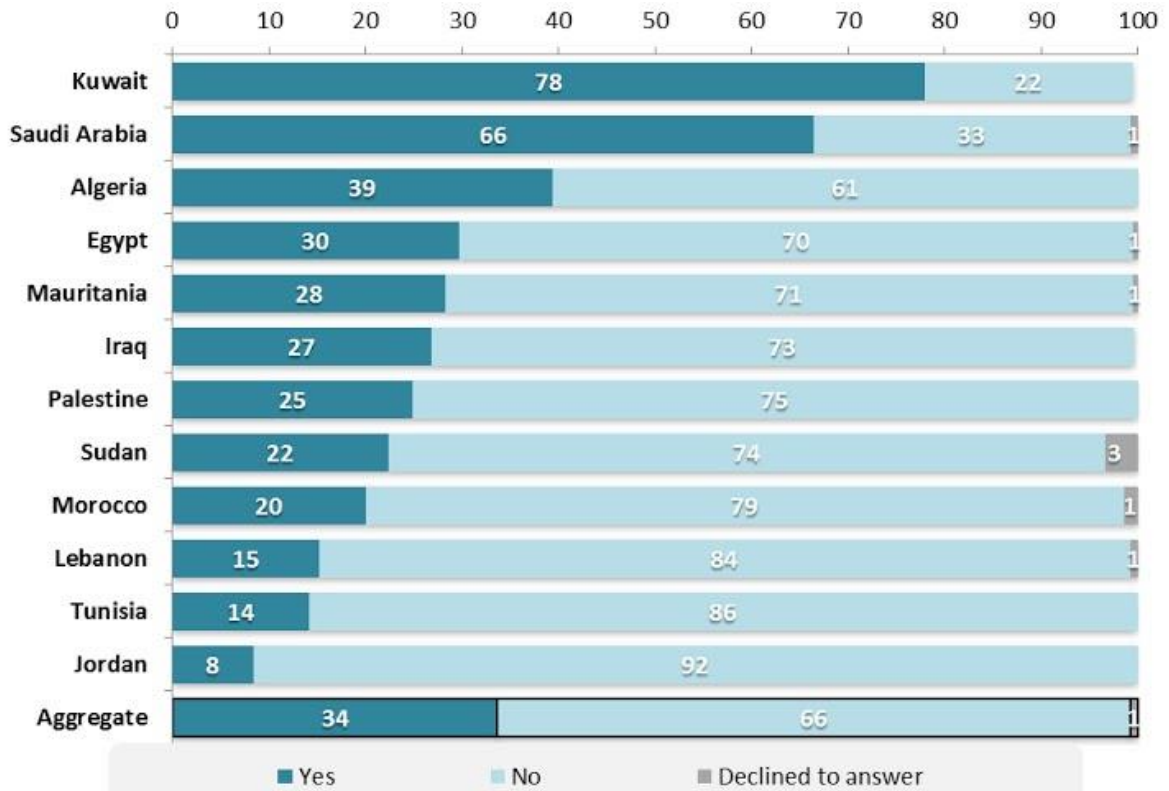
Proportions of respondents with accounts on Twitter, by country. Question limited to those who use the internet.

Arab Internet Users with FaceBook and Twitter Accounts
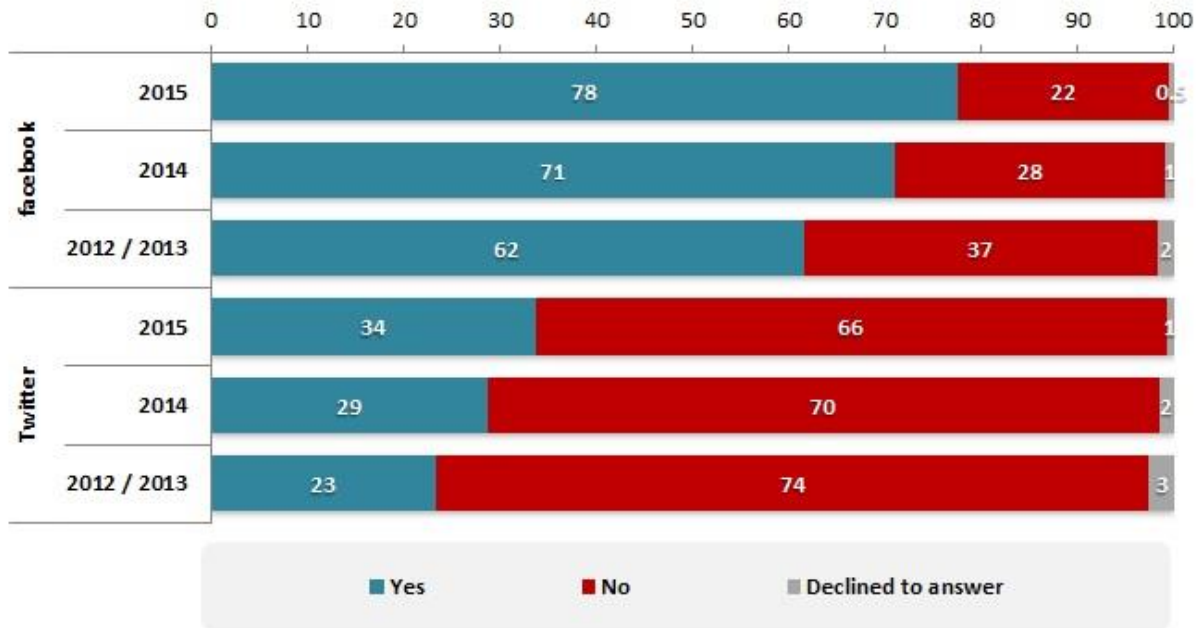
Figure 4.6 Social media networks have had increased usage over the past three years.

Do you use your account on (facebook/Twitter)
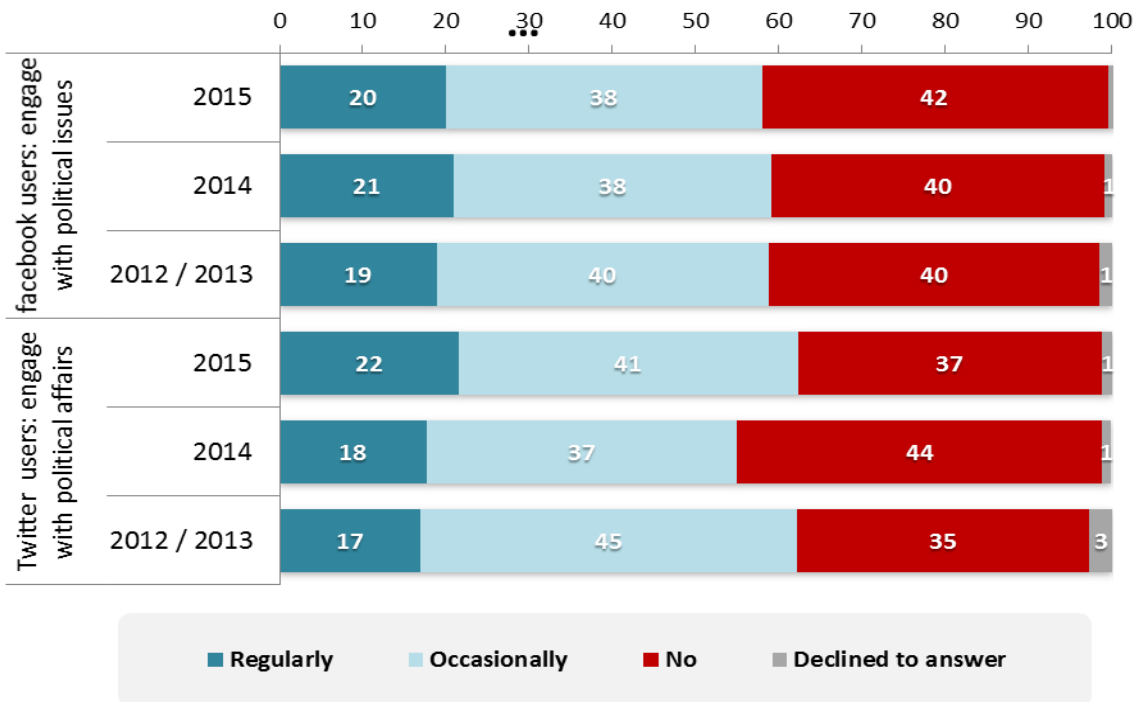
Figure 4.7 Most Arab social media users use their accounts to engage with political affairs.

- Membership of and participation in civil and voluntary organizations remains extremely limited across the Arab region, with no more than 14% of respondents reporting that they are members of such groups.

- When taking into account the level of active participation in the activities of such groups, the level of effective participation would likely fall further still.

Figure 4.8 Membership of voluntary/civil society organizations across the Arab world remains limited.

Membership of voluntary/civic organizations across the Arab world.
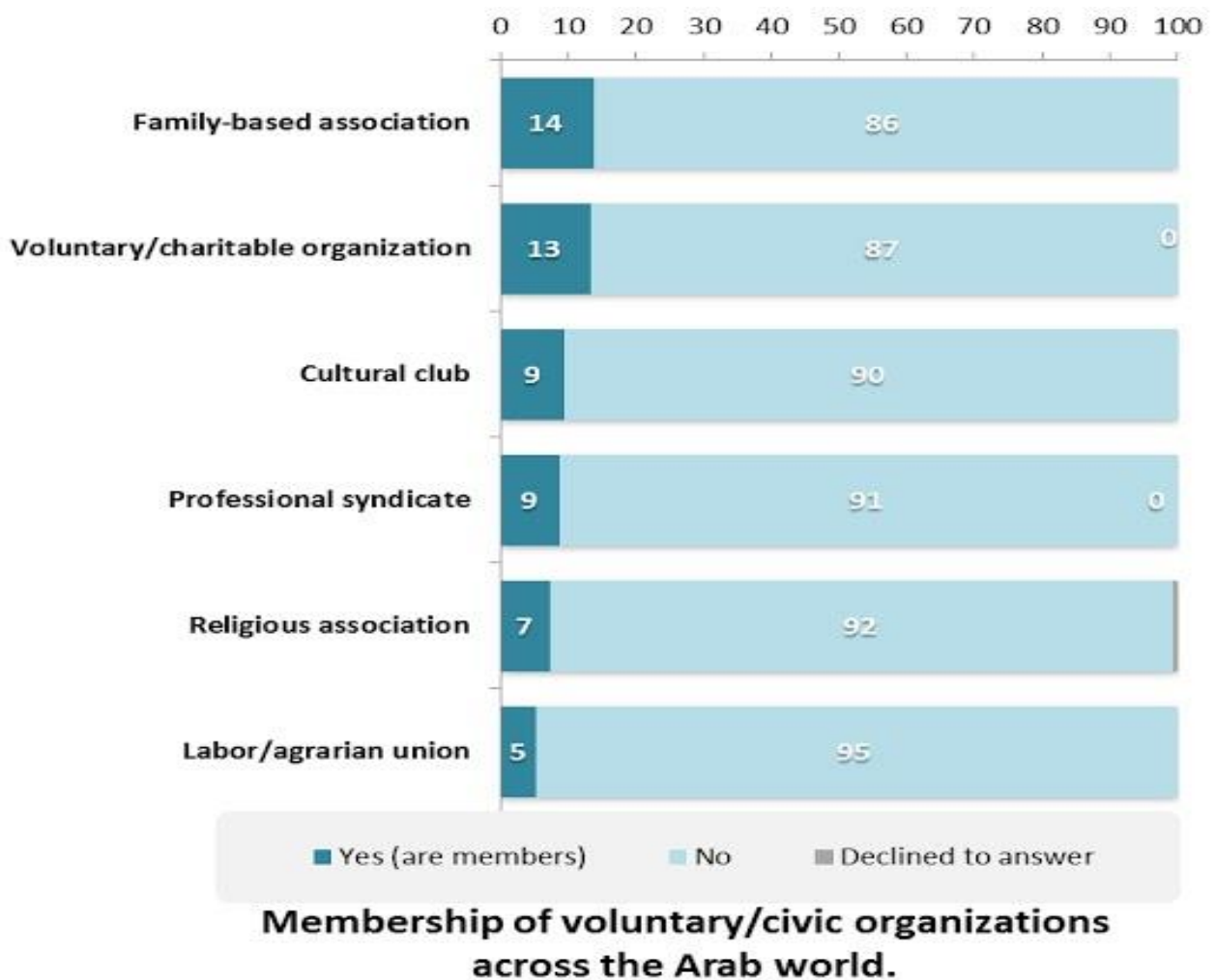
- Additionally, a majority of Arabs (54%) are unaffiliated with a political party in any way, nor do they feel that their views are represented by any existing political group or bloc. Respondents who reported that they were either members of political parties or that there was a political party which they felt was representative of their views, were concentrated in Mauritania, Morocco, Tunisia, Algeria, Palestine, Iraq and Lebanon.
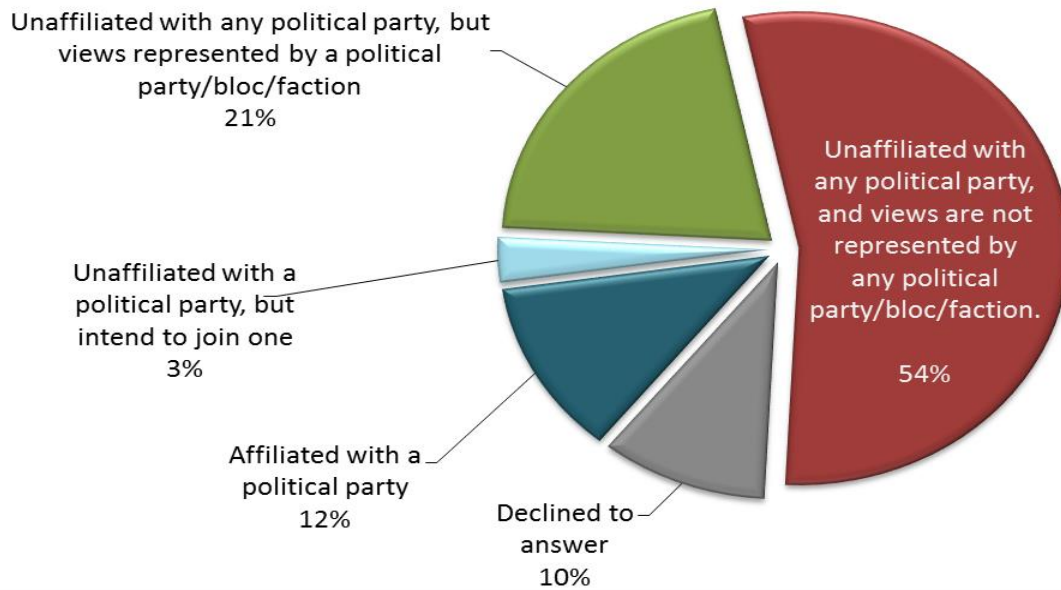
Figure 4.9 A majority of the Arab public are not affiliated with any political parties, nor do they feel that there exists a political party which represents their views.

Religion and Religiosity in the Public Sphere and Political Affairs

- Based on self reporting, a majority of the Arab public is "Religious to some extent" (63%). This compares with 9% of the Arab public who define themselves as "not religious", and 24% as "very religious".
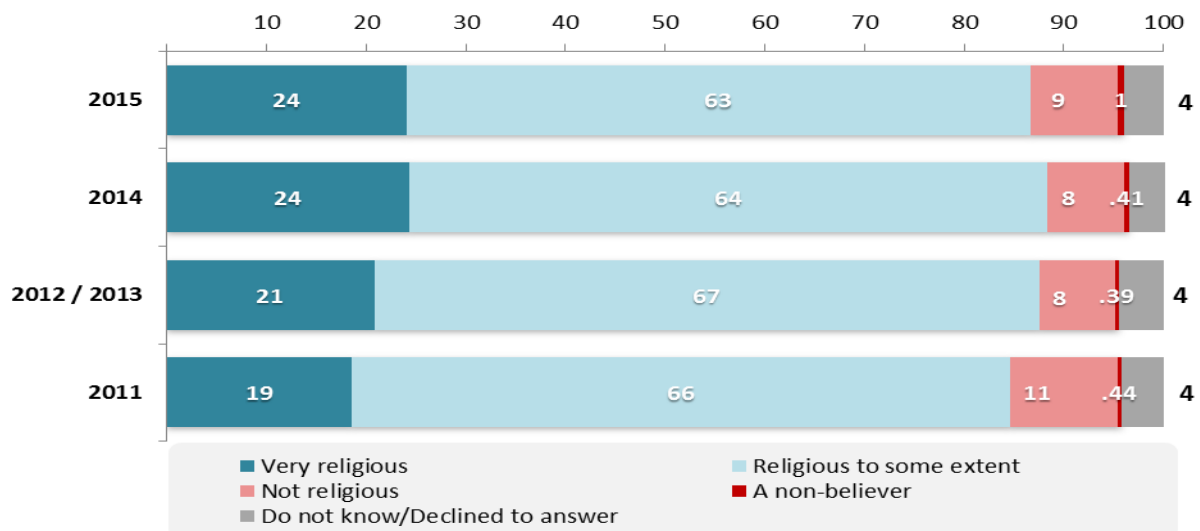
Figure 5.1 Respondents' self-reporting of their religiosity over four consecutive surveys.

- When asked to define the attributes which define religiosity, most respondents provided answers that focused on an individual's morality and values rather than the observance of religious practices.
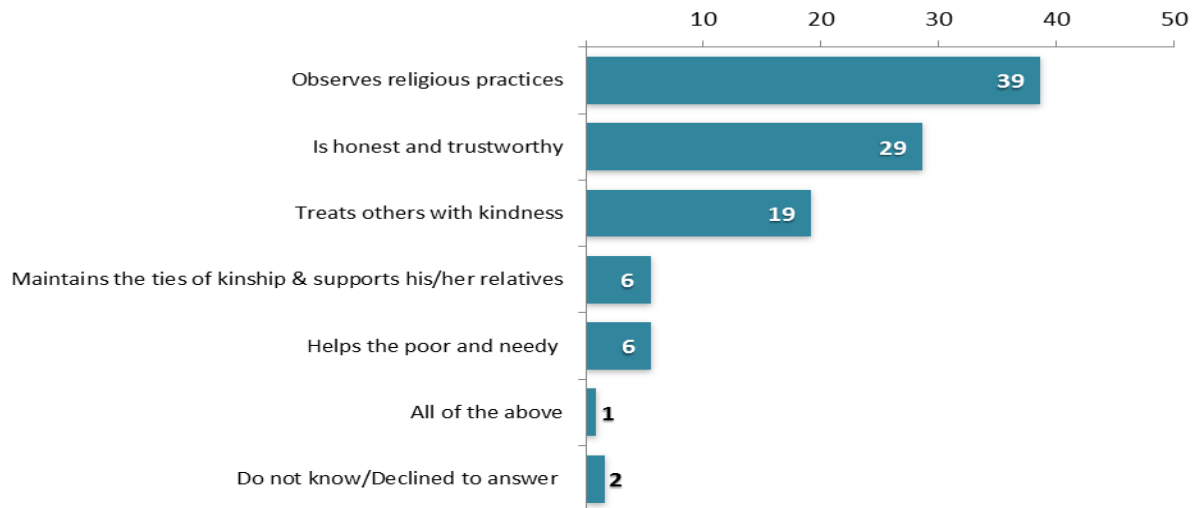
Figure 5.2 Frequency of different characteristics cited by respondents as the most important for being considered religious.

- While most Arabs describe themselves as religious, they nonetheless oppose edicts which pass negative judgement against members of other faiths, or which declare followers of varying interpretations of the same faith to be apostates. Most respondents, while religious, refuse to accept that non-religious people are by definition bad people. Finally, most respondents do not discriminate on the basis of religiosity, between religious and non-religious individuals, when conducting their social, political and economic/business interactions.
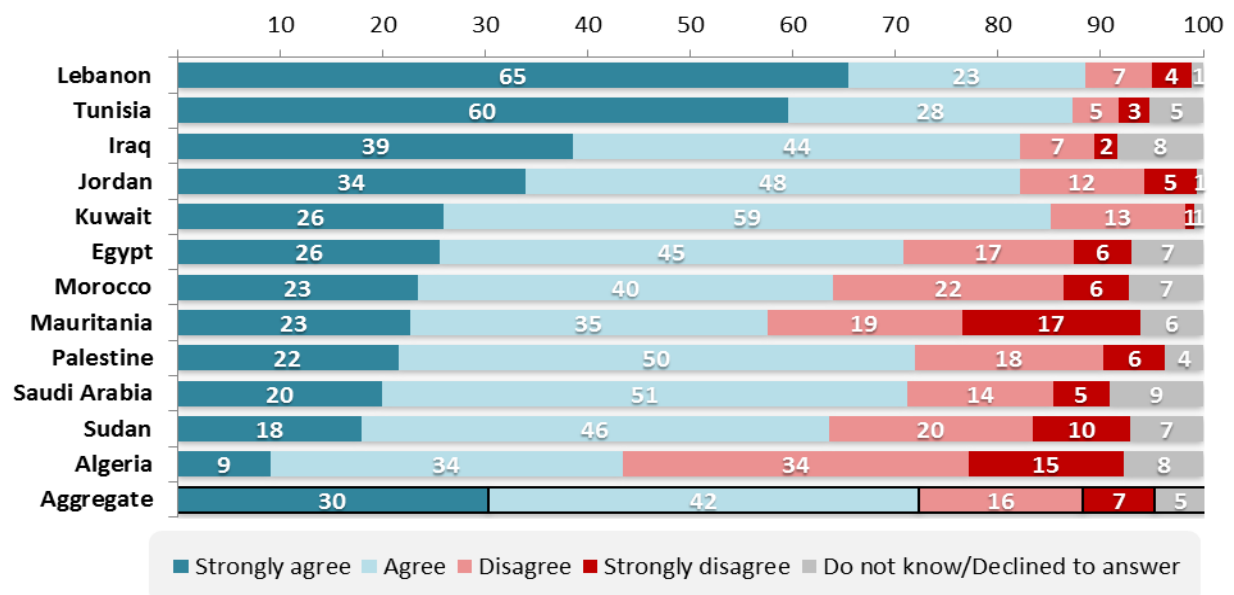
Figure 5.3 Levels of agreement and disagreement with the statement: "No person/group has the right to declare followers of other religions to be infidels".

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- A majority of Arabs opposes the involvement of clerics in voter choice or in governmental policy.

	Strongly agree	Agree	Disagree	Strongly disagree
Lebanon	68	23	4	3
Tunisia	59	29	4	5
Iraq	37	47	9	3
Kuwait	33	51	12	1
Mauritania	30	46	16	5
Morocco	29	43	16	6
Sudan	28	39	20	7
Egypt	28	48	16	5
Jordan	27	54	15	4
Palestine	22	47	23	6
Saudi Arabia	21	56	14	3
Algeria	14	43	30	8
Aggregate	33	44	15	5
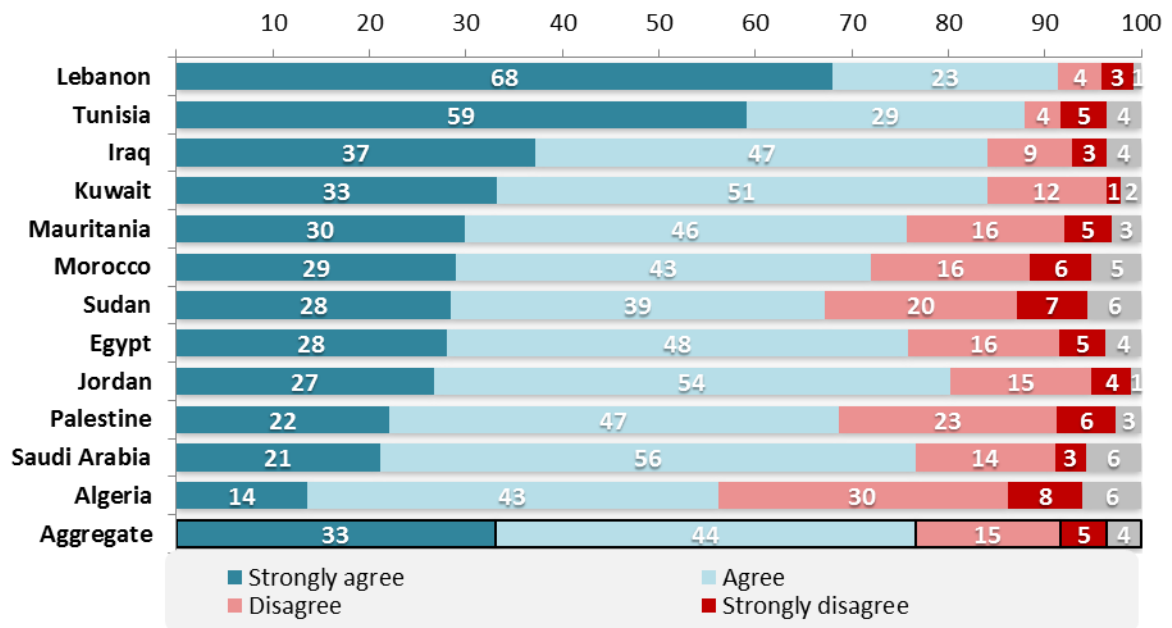
Figure 5.4 Respondents were asked to express the extent of their agreement/disagreement with the statement "The government does NOT have the right to use religion as a means of winning public support."

- Similarly, a majority of Arabs are opposed to the employment of religion either by governments in order to win support for their policies, or by electoral candidates to win votes. In contrast, Arab public opinion is split almost in half in their attitudes towards the general "separation of religion from the state", although there is a very slim majority in favor of the separation of religion from public affairs.

	Strongly agree	Agree	Disagree	Strongly disagree	Do not know/Declined to answer
2015	22	30	27	16	5
2014	24	27	25	15	9
2012 / 2013	19	27	27	14	13
2011	26	17	16	26	16
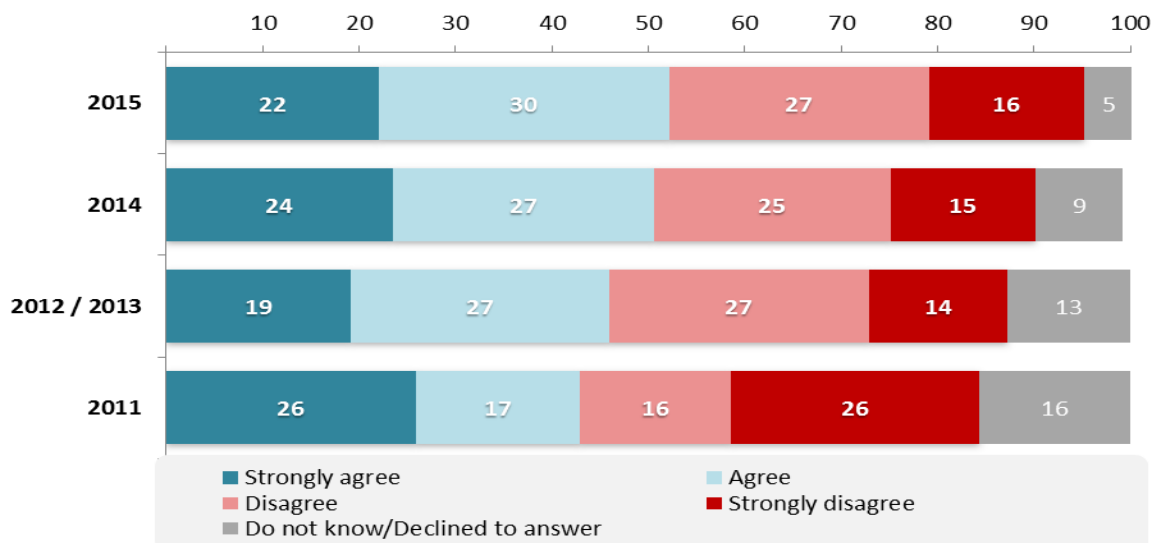
Figure 5.5 Respondents were asked for their in-principle agreement with the statement "It would be better for my home country if religion were separated from politics." Support for this has remained steady throughout successive surveys.

Respondents' agreement/disagreement with the statement:
"In order to meet the demands of the modern-day economy, banks should be allowed to charge interest"
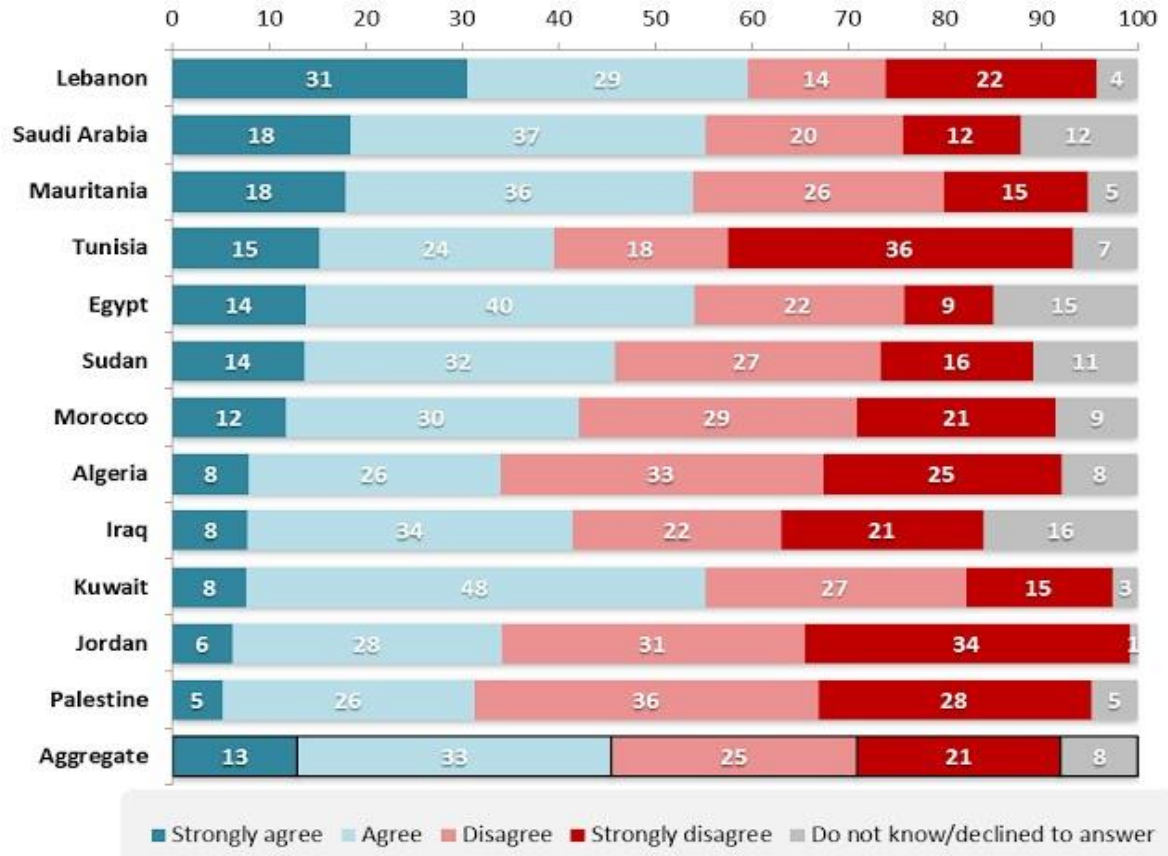
Figure 5.6 Arab respondents are broadly opposed to banks profiting from interest payments, which is in contradiction to religious teachings, but Saudis are more likely than Jordanians or Palestinians to accept interest rates as an economic reality.

	0	10	20	30	40	50	60	70	80	90	100
Lebanon				69					20	7	3 1
Tunisia				58				28		5 5	3
Mauritania				46			36		11	5	3
Egypt				45			44		8	2 2	
Sudan				36		45			11	4 4	
Iraq				33		44			16	3 4	
Morocco				33		47			15	2 3	
Jordan				31		50			14	4 1	
Saudi Arabia				30		54			10	1 5	
Palestine				24		51			19	3 2	
Kuwait				23		53			22	1 1	
Algeria			15		47			27		5	6
Aggregate				37		43			14	3 3	

■ Strongly agree ■ Agree ■ Disagree ■ Strongly disagree ■ Do not know/ Declined to answer

Respondents react to the statement "Clerics should not influence voter choice".

Figure 5.7 Arab citizens are broadly opposed to the involvement of clerics in everyday political affairs, including influencing voter choice during elections. The Lebanese are most opposed to direct involvement of religious authorities in voter choice.

Arab Public Opinion and Pan-Arab Affairs

- A total of 79% of the respondents to the 2015 Arab Opinion Index expressed views supportive of the unity of the Arab nation, with 37% supporting the statement that "[the Arab peoples] are one 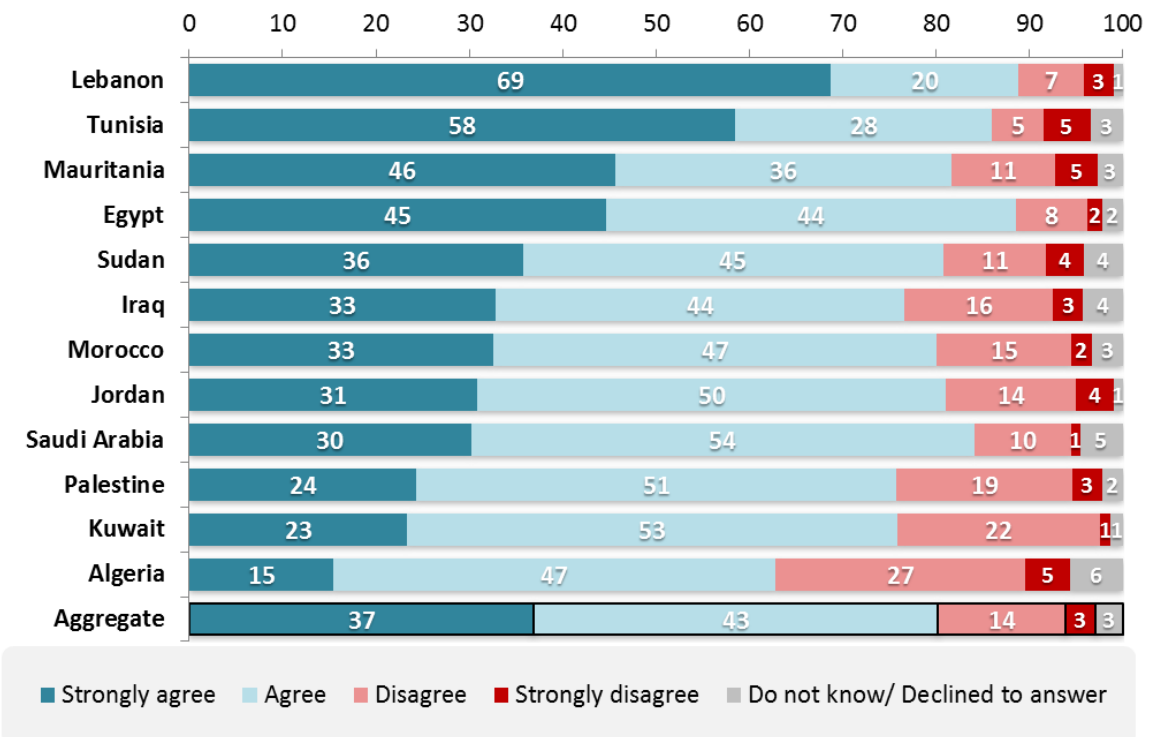nation, divided by artificial boundaries" while a further 42% supported the statement that the Arab peoples form "one nation, but each of the peoples within that nation has its own distinct characteristics".

- A clear majority of 75% of the Arab people believe that the Palestinian cause is one which concerns "all of the Arab peoples and not just the Palestinians alone". Similarly, clear majorities across the Arab countries were opposed to any peace agreements already signed between Arab parties 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). Additionally, 85% of Arab citizens opposed their own country's recognition of Israel. Of those respondents who stated that they would accept their country's recognition of Israel, a significant proportion stipulated that such recognition should be conditional on the creation of an independent Palestinian state. Opposition to Arab recognition of Israel has remained steady for several years, and is consistent across the geographic expanse of the Arab region.

- Arab citizens explained their opposition to recognition of Israel by their home countries for a number of different reasons, mainly focused on Israel's racist, expansionist and colonialist policies. Further to this, 67% of the aggregate Arab population named either the United States or Israel as the biggest threats to collective Arab security, while 10% of the respondents cited Iran.

Figure 6.1 Respondents to the Arab Opinion Index have consistently provided answers which reflect their belief in the integrity of a single Arab nation.

Respondents' views of the integrity of the Arab nation: which of the following statements do you agree with the most? Results from successive surveys.
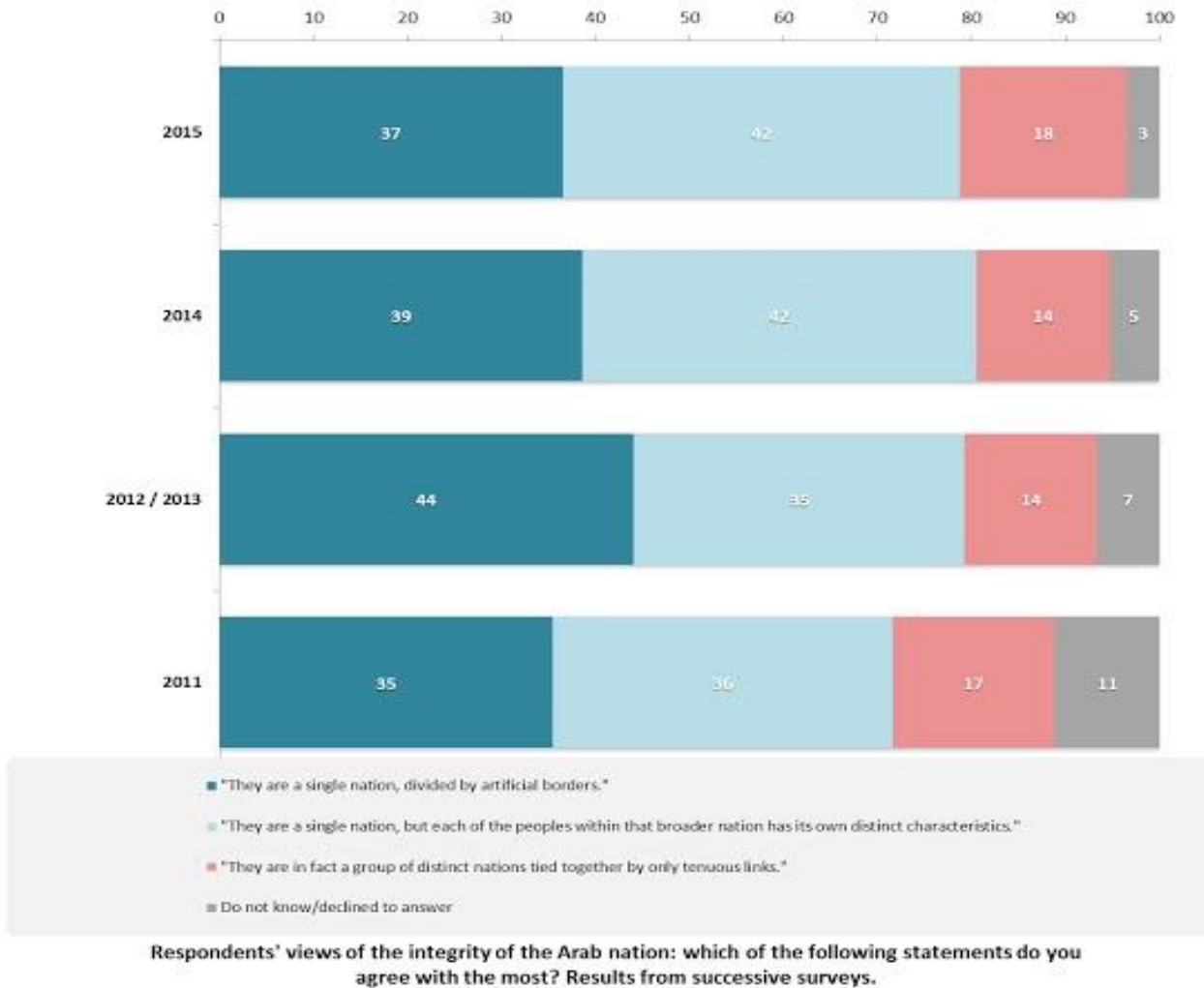
Figure 6.2 Three quarters of the Arab people continue to believe that the Palestinian cause is one which concerns all Arabs.

- ■ "The Palestinian cause concerns all of the Arab peoples, and not the Palestinians alone."
- ■ "The Palestinian cause is a concern solely for the Palestinian people, and they alone should work to resolve it."
- ■ Do not agree with either of the above statements.
- ■ Do not know/declined to answer.

Respondents asked to determine which of two statements related to the Palestinian cause they agree with the most.

Figure 6.3 The Arab public remains consistently opposed to their home countries' diplomatic recognition of Israel.

■ Support   ■ Oppose   ■ Do not know/Declined to answer

Table 1 Reasons cited by respondents for opposing recognition of Israel by their home countries in the 2015 AOI compared to the results of the 2014 AOI

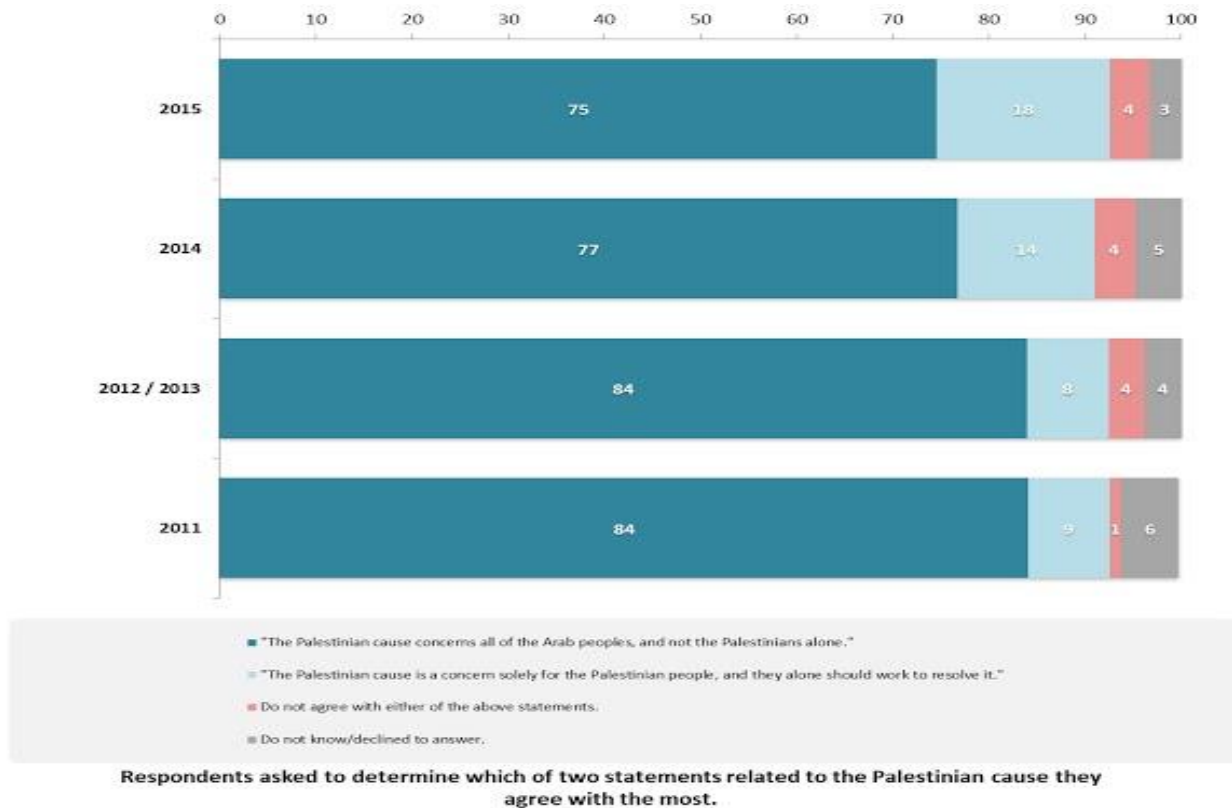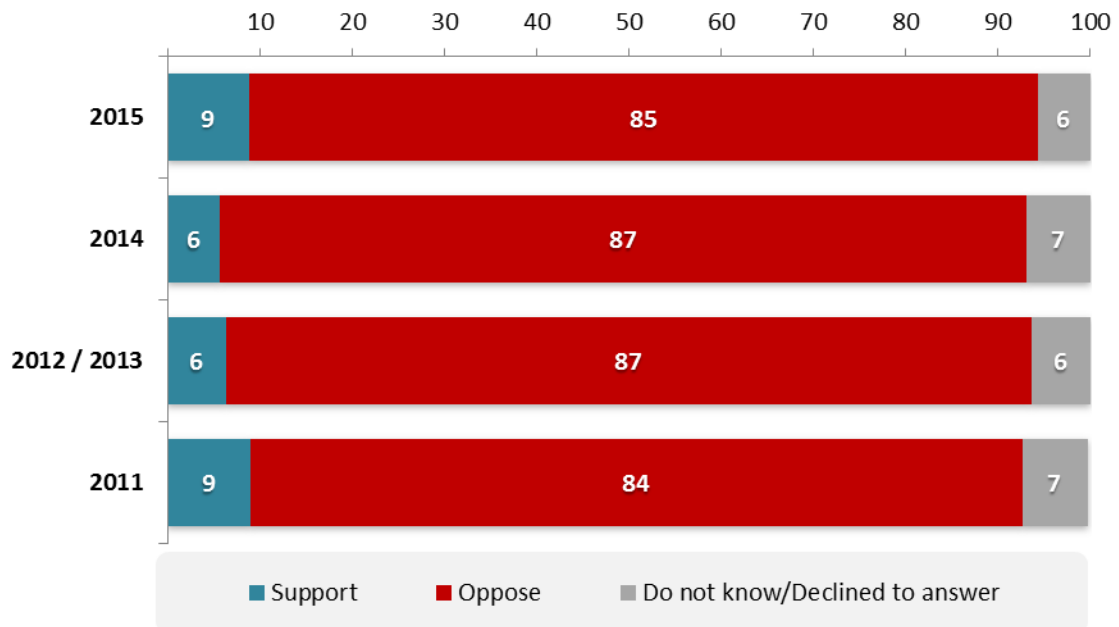|	2015 AOI	2014 AOI
Israel is a colonialist, expansionist state	24.5	23.4
Its dispossession of the Palestinians and its continued oppression of those people	6.9	5.5
It is a Zionist entity which treats the Arabs with disdain and racism	10.3	12.2
It is a terrorist entity/supports terrorism	10.4	1.2
Because of Israeli enmity towards my people in particular/the Arabs in general	4.7	11.5
Doing so would be to accept the destruction of the Palestinian homeland	5.6	7.5
It does not respect international law	2.4	2.3
(Israel) threatens my home country's national security and destabilizes the region	3.4	2.5
It is an expansion state which seeks to dominate the Arab world and control its resources	13.0	2.4
Respondents who cited religious reasons	3.3	4.9
Respondents opposed the existence of Israel as a state	0.3	--
Other	0.0	3.4
Do not know/Declined to answer	6.4	18.4
Respondents support the recognition of Israel	8.9	6.0
Total	100.0	100

- A majority of Arabs have an unfavorable view of the foreign policies of Iran, the United States and Russia towards the Arab world. Results show that the perception of the foreign policies of the United States and of Iran worsened over the past year. Views of the foreign policies of France, Turkey and China towards the Arab region were more favorable among respondents in the general group compared to respondents' perceptions of the other foreign powers: Russia, the United States and Iran.
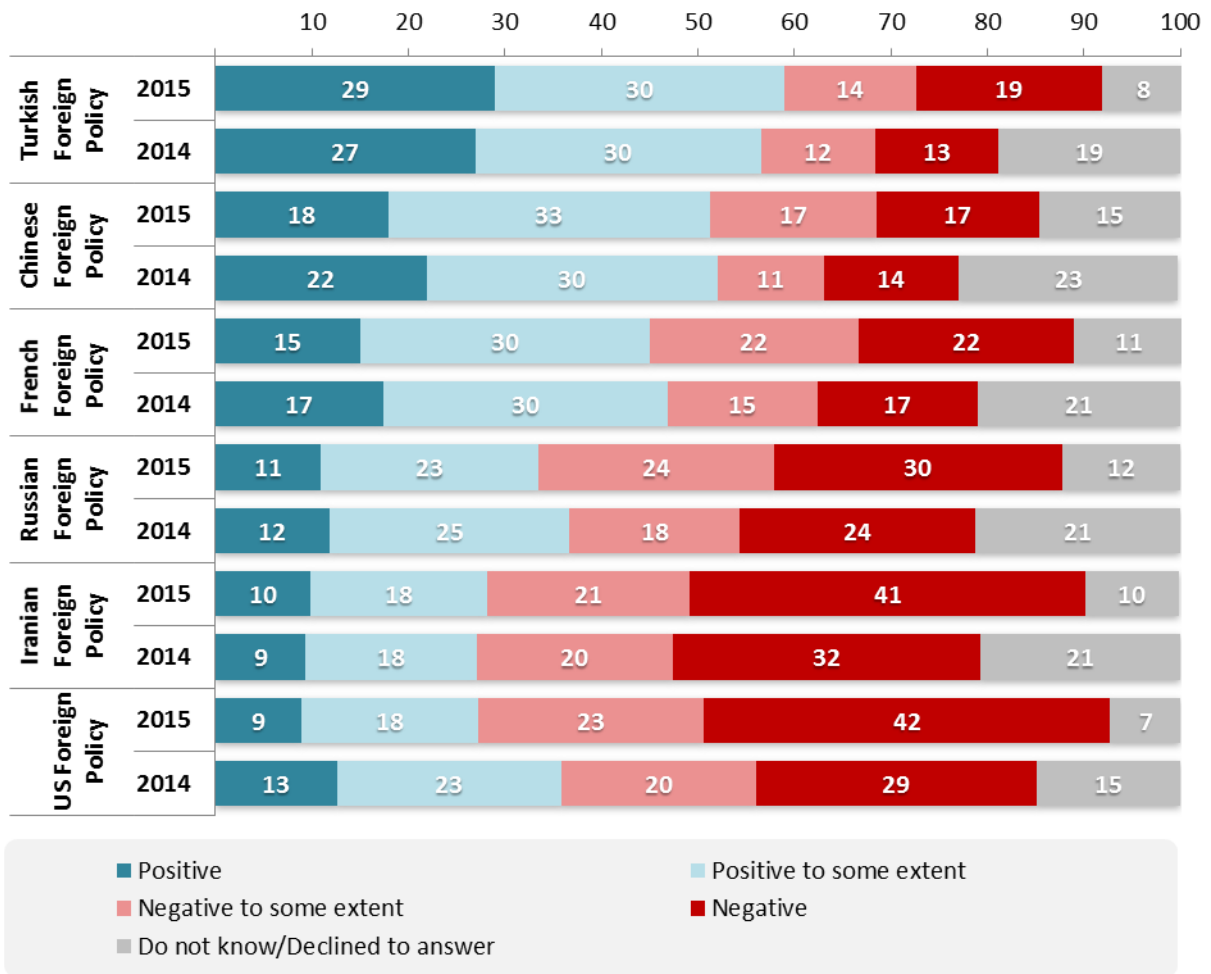
Figure 6.4 How respondents viewed the foreign policies of a number of countries towards the Arab region.

- A clear majority of 63% of Arabs support the creation of a nuclear weapons-free zone in the Middle East, but opinion is roughly equally divided in reacting to the statement "Israel's possession of nuclear weapons justifies efforts by other states within the region to acquire such weapons".

Figure 6.5 The Arab public's support for the creation of a nuclear weapons-free Middle East has increased in recent years.

Respondents' attitudes to the creation of a nuclear weapons-free zone across the Middle East.
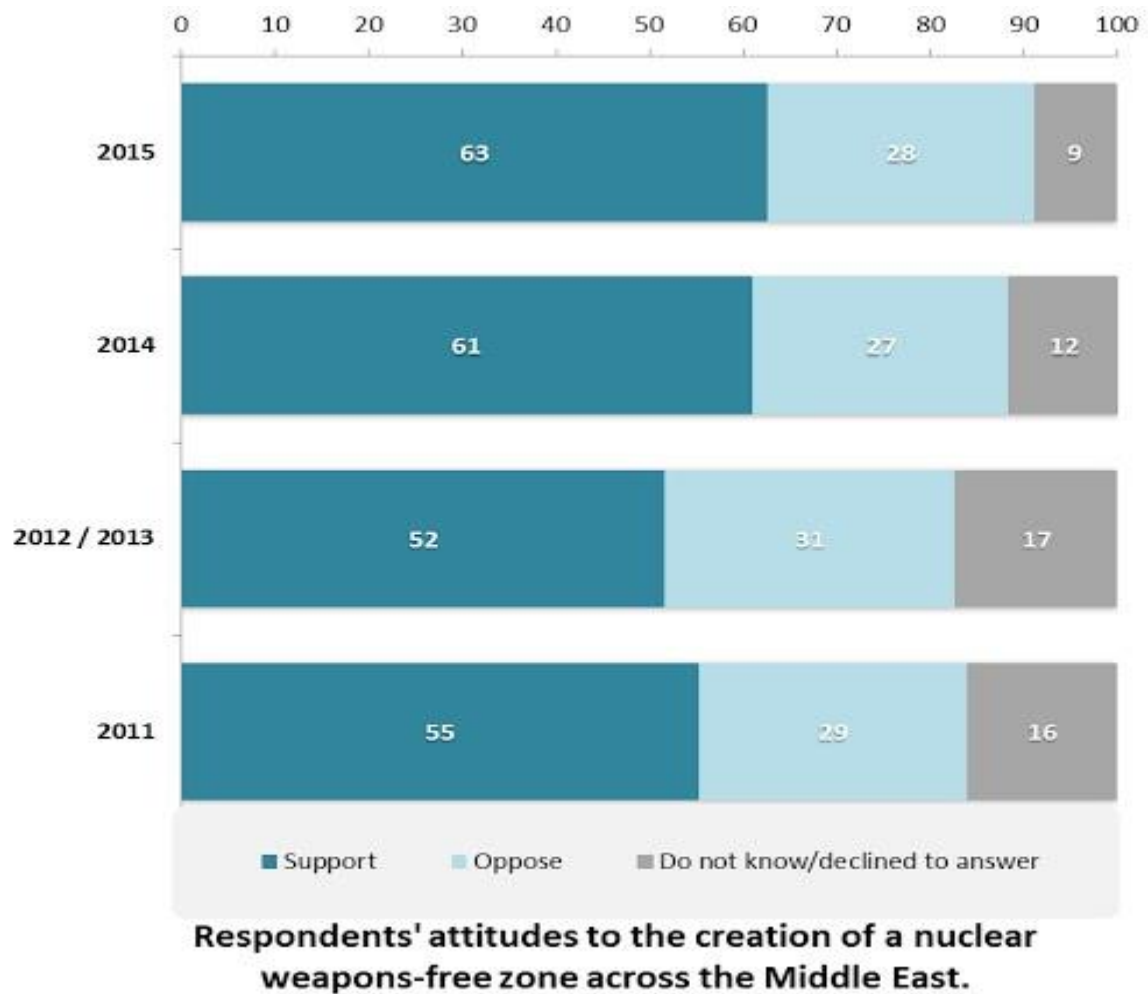
Arab Public Opinion and the Arab Spring

- Results from the 2015 Arab Opinion Index reveal a complex set of public attitudes towards the revolutions of the Arab Spring. While 59% of respondents regard the Arab Spring and its attendant consequences to be negative, another 34% of Arab public opinion views the Arab Spring as a positive development.

- Respondents whose views of the Arab popular revolutions were positive explained their positions by crediting the revolutions with the toppling of tyrannical and corrupt regimes, paving the way for democratic forms of government, and also provided Arab citizens with freedom of expression, and restored Arab popular dignity.

- In supplementary written answers, respondents who took a negative view of the Arab Spring explained their positions by focusing on specific consequences of the Arab revolutionary wave: the large-scale human losses; the spread of discord and chaos and lack of security; the collapse of states and state institutions; and instability more broadly. Crucially, the overwhelming majority of respondents who viewed the Arab Spring negatively did not voice principled objections to the revolutions and their aims. However, respondents who are against the Arab revolutions of 2011 are among those who have a negative view and constitute only 5%.

Figure 7.1

	Very positive	Postive to some extent	Negative to some extent	Very negative	Do not know/declined to answer
2015	10	24	25	34	7
2014	17	28	17	25	12
2012 / 2013	25	36	11	11	17
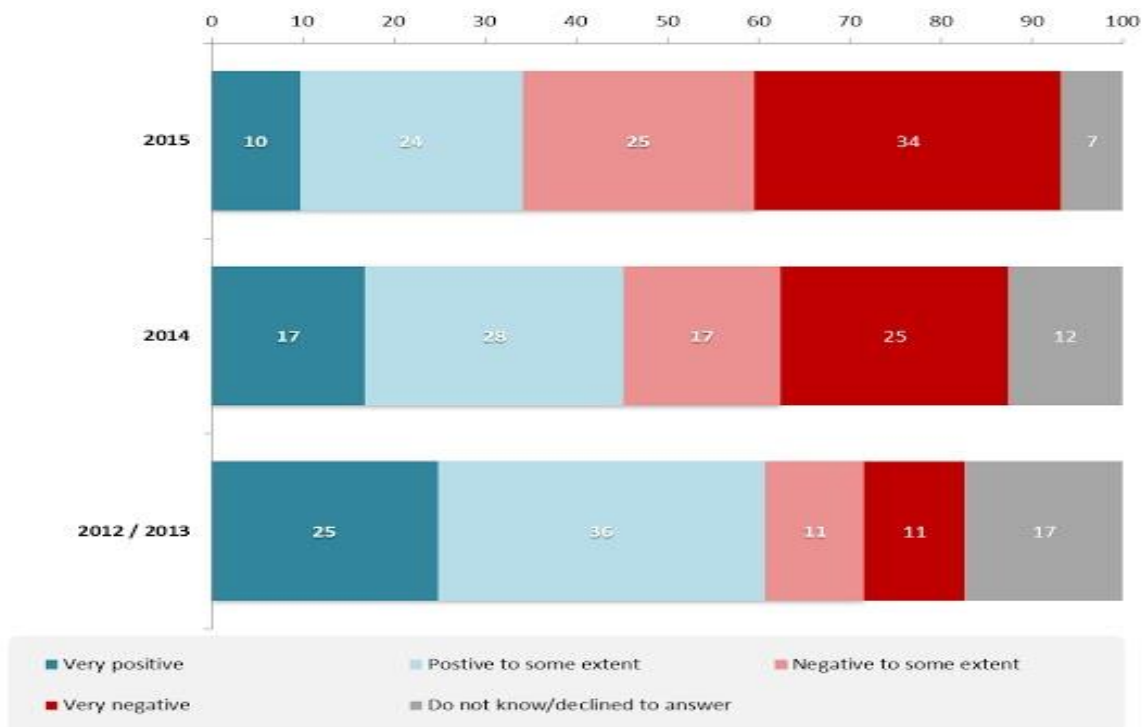
Public attitudes towards the Arab Spring and its outcomes.

- Results from the 2015 Arab Opinion Index show optimism towards the fulfillment of the goals of the Arab Spring. Fully 48% of respondents agreed that the Arab Spring "will achieve its aims", despite its present turbulent state. Yet this remains less than the 60% who believed the same at the time of the 2014 poll. Fully 35% of the Arab public believes that the Arab Spring has already come to an end, and that the previous regimes have returned to power, more than twice the proportion who believed the same in 2014.

Figure 7.2

	"The Arab Spring is facing a series of challenges and obstacles, but will ultimately succeed in achieving its aims."
	"The Arab Spring has come to an end, and the old regimes have returned to power."
	Do not agree with either of the above.
	Do not know/declined to answer.

Respondents' agreement/disagreement with one of two statements regarding the future progress of the Arab Spring.

- A majority of 57% of respondents expressed their fears – to varying extents –with regards to the rise of Islamist political movements, compared to 61% who expressed their fears of the rise of secular / non-Islamist political movements. Only 36% and 33% of respondents, respectively, expressed having no fears with regards to the rise of Islamist and non-Islamist political movements.

Figure 7.3

The Rise of Political Movements: Fears of the Arab Public
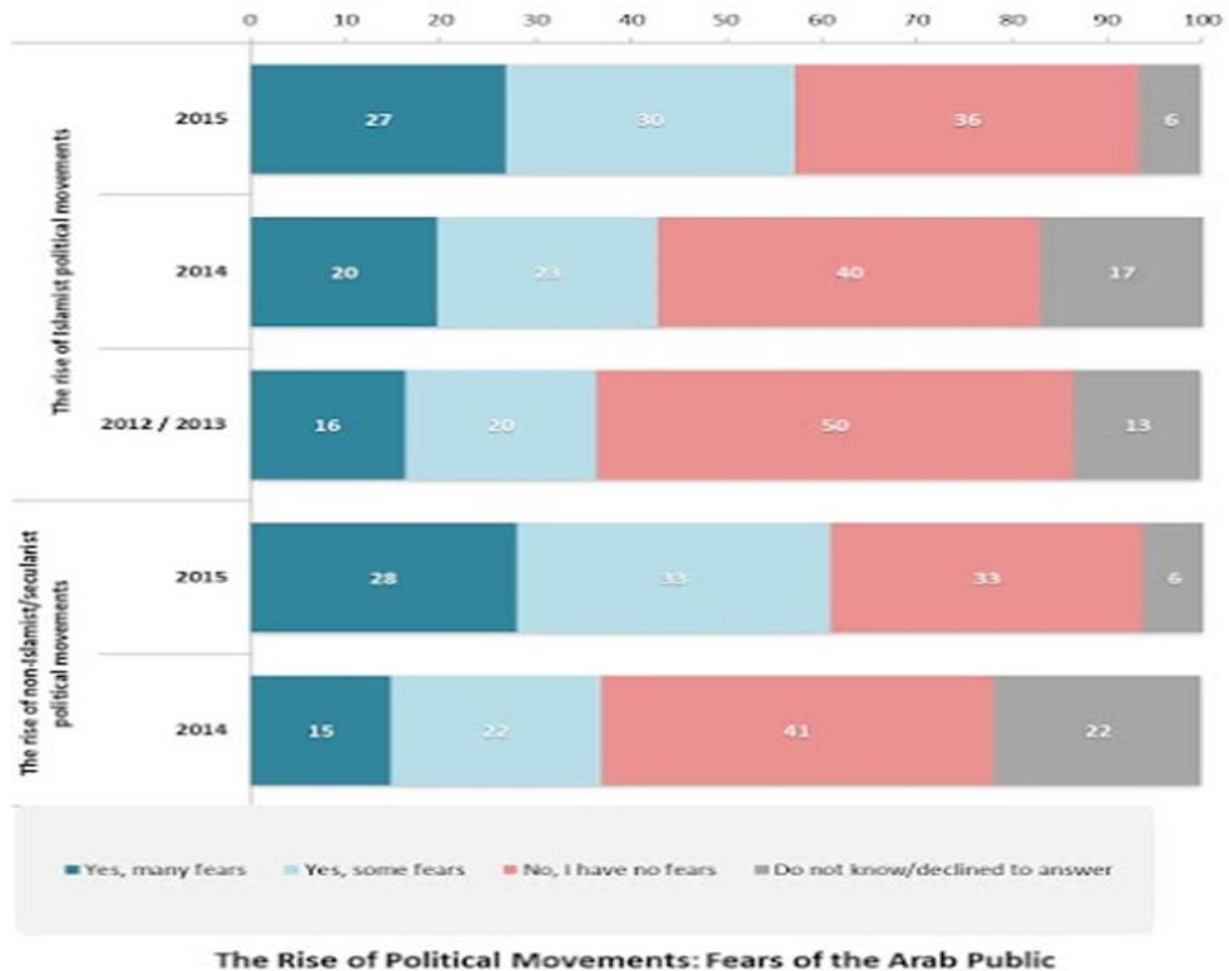
- The fact that large groups of Arab respondents fear the rise of both Islamist and non-Islamist political movements – and the fact that a large proportion of respondents fears the ascendancy of both of these groups – is a reflection of the discord and disarray among Arab political movements and the partisanship and conflicts between Arab political movements, which is therefore reflected in a lack of public confidence in Arab political movements. Given these public attitudes, the lack of consensus between these two broad categories of political movements can be exploited by anti-democratic forces to agitate for a return to authoritarianism, and will therefore prove to be an obstacle on the path to democratization.

Arab Public Opinion and Current Affairs

- Almost all respondents (99%) indicated that they were aware of the Islamic State of Iraq and the Levant (ISIL, also known as the "Islamic State of Iraq and Syria" and "the Islamic State"). Roughly three quarters of respondents (76%) indicated that they follow ISIL-related developments closely

through the media; of those who follow ISIL-related developments, a majority of 59% rely on television as their source of information. Online news sources are the second most relied on source of ISIL-related information.

Country	Very closely	Sometimes	Rarely	Not at all	Do not know/Declined to answer
Iraq	43	36	8	11	2
Saudi Arabia	41	43	10	6	1
Kuwait	35	43	15	6	1
Lebanon	29	41	18	11	
Tunisia	14	37	27	22	
Jordan	14	32	27	26	
Palestine	13	28	27	31	1
Sudan	11	32	19	34	3
Morocco	8	52	24	15	1
Mauritania	8	22	28	42	1
Egypt	7	33	25	34	1
Algeria	5	32	21	41	1
Aggregate	19	36	21	23	1

■ Very closely   ■ Sometimes   ■ Rarely   ■ Not at all   ■ Do not know/Declined to answer

Figure 8.1 Respondents' answers to the questions "Do you follow ISIL related developments through the media?"
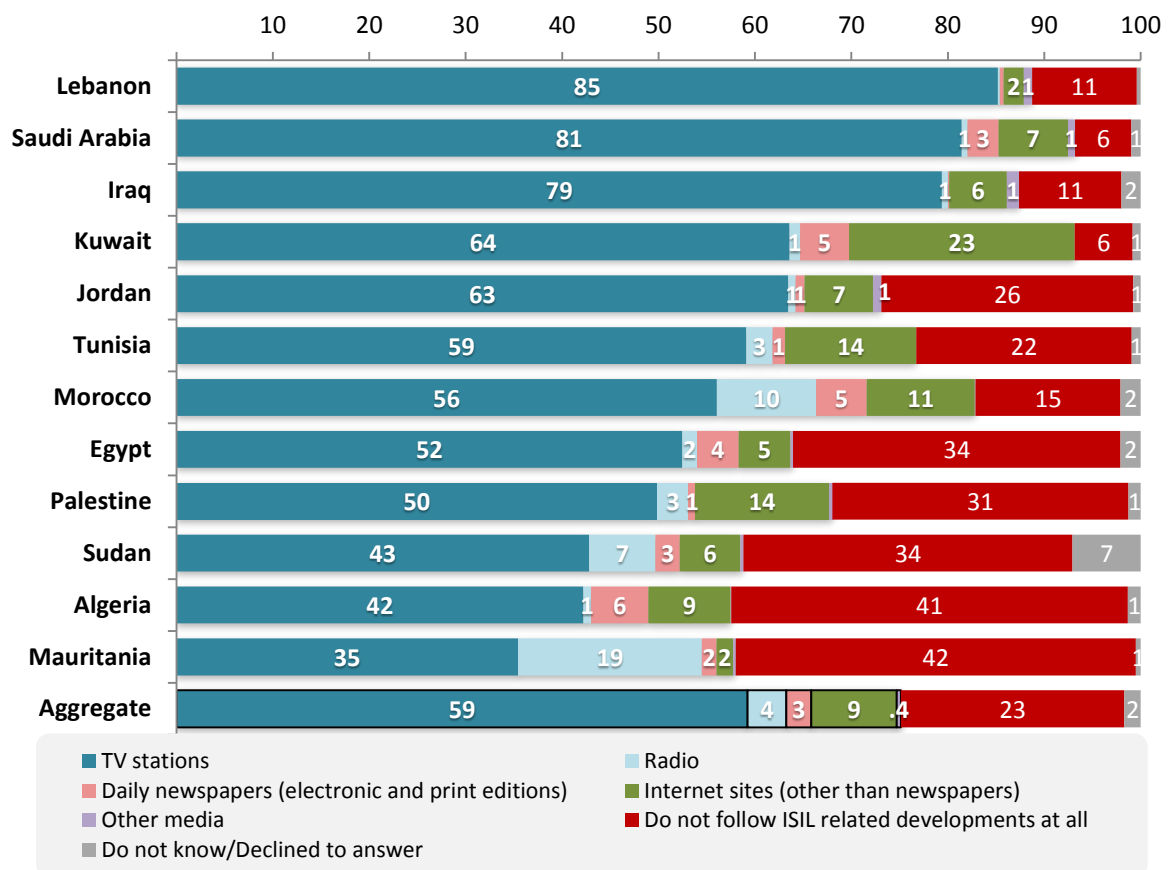
Figure 8.2 Respondents' answers to the questions "Which news medium do you rely on the most to receive up-to-date news on ISIL?"

- An overwhelming majority of 89% of the Arab public has a negative view of ISIL, with 3% expressing a "positive" view, and 4% "positive to some extent". This represents an increase in the proportion of Arab citizens with a negative view of ISIL over the past year (from 85% to 89%).

Figure 8.3 Respondents' answers to the question "In general, do you have a positive or negative view of ISIL?" (% of respondents reported that they were aware of ISIL).

In general, what is your view of the Islamic State in Iraq and the Levant group? (Responses from aggregate sample, across two separate surveys)

Figure 8.4

- Crucially, favorable views of ISIL are equally prevalent among respondents who are "very religious" and those who are "not religious", and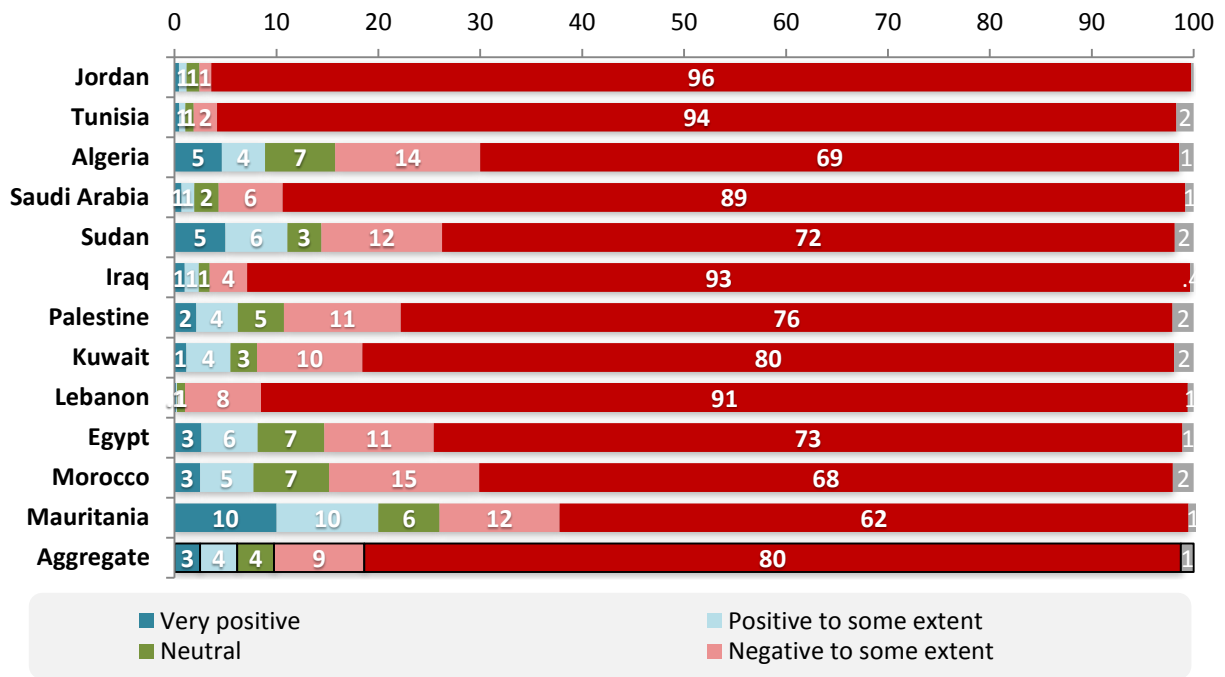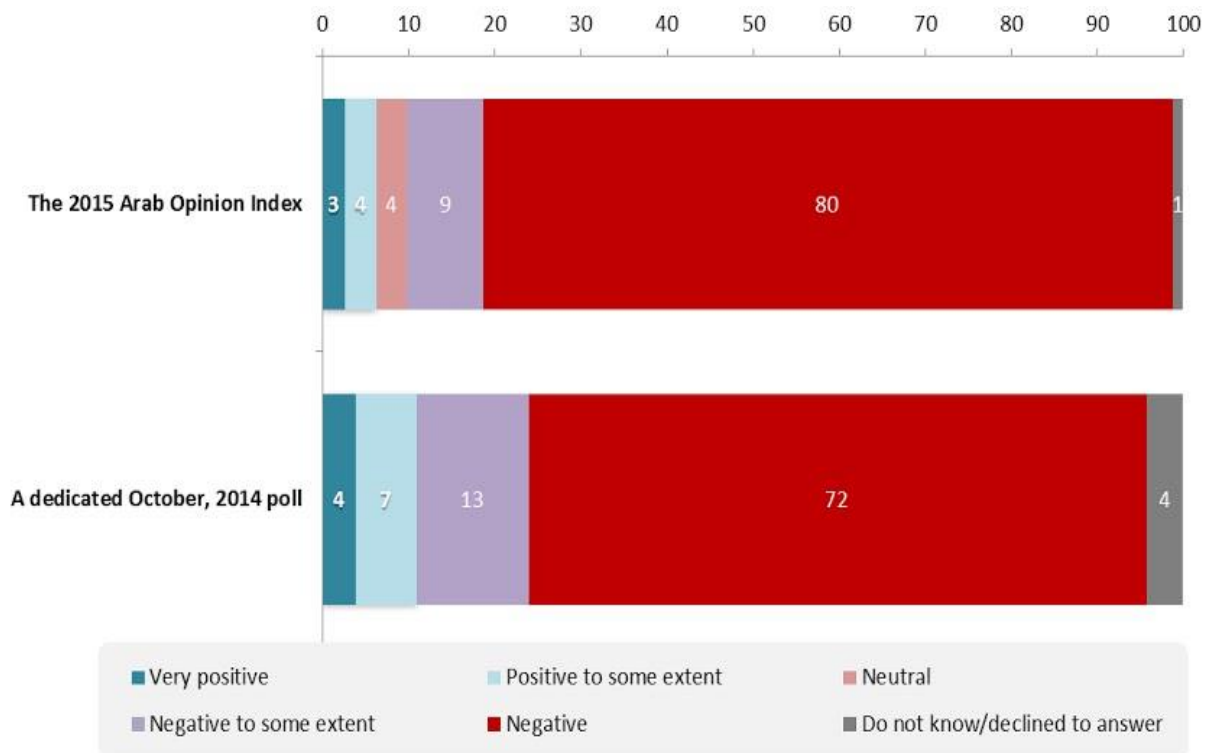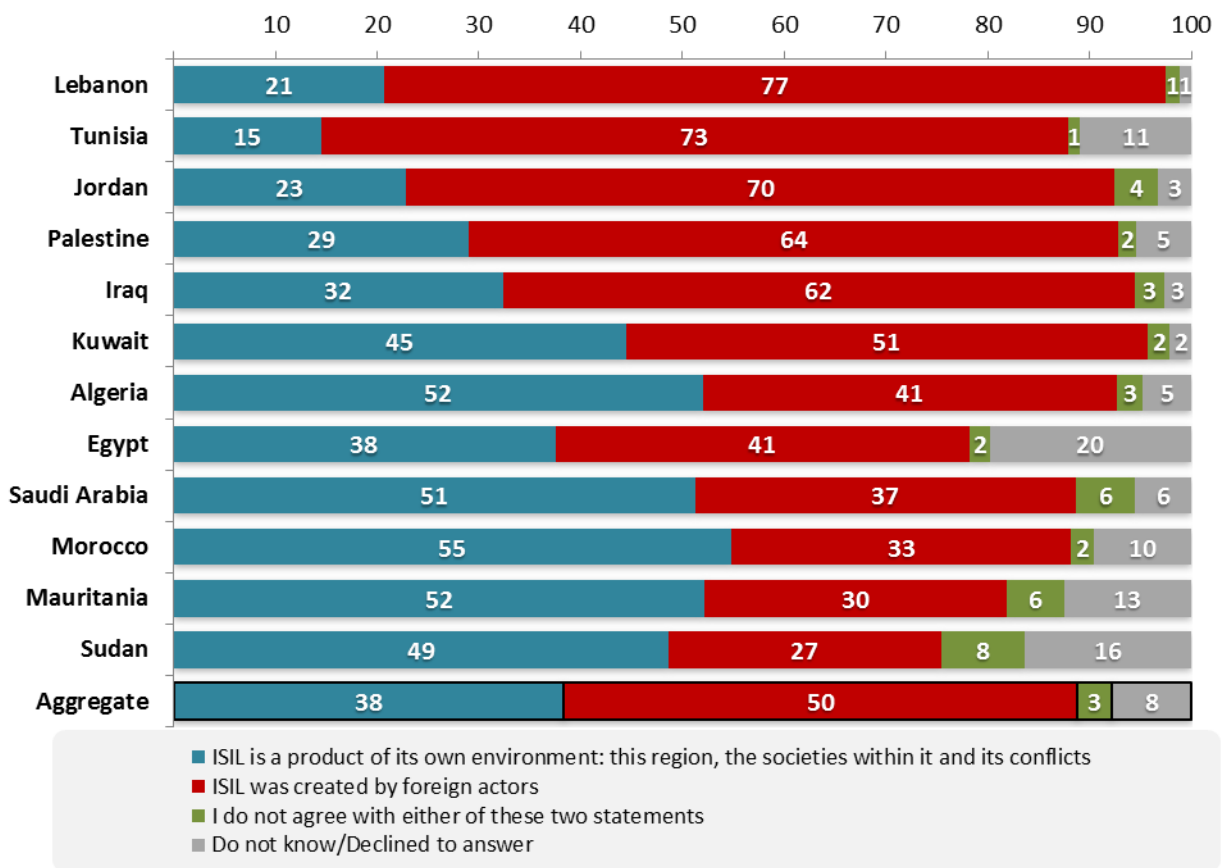 also equally prevalent amongst opponents and supporters of the separation of religion from the state. What these facts indicate is that support for ISIL, where it exists, is not rooted in religious bases (i.e. they are not adherent of ISIL's ideology). Rather, it is evident that the positive views are based on political considerations as they relate to the Arab region and its conflicts.

Figure 8.5 Comparing respondents general view of ISIL by different variables (Cross tabulated)

Respondents view of ISIL	Respondents' self-reporting of their religiosity		
	Very religious	Religious to some extent	Not religious
Very positive	4	2	3
Positive to some extent	5	3	5
Neutral	5	3	4
Negative to some extent	11	8	9
Negative	75	84	79
Total	100	100	100
Respondents view of ISIL	Respondents' agreement/disagreement with the statement: "Religious practices are private affairs and should be separated from public (social and political) life"	
	Agree	Disagree
Positive	6	6
Negative	91	89
Neutral	3	4
Total	100	100
Respondents view of ISIL	Respondents' agreement/disagreement with the statement: "In order to meet the demands of the modern-day economy, banks should be allowed to charge interest"	
	Agree	Disagree
Positive	6	6
Negative	90	90
Neutral	4	4
Total	100	100
Respondents view of ISIL	Respondents' agreement/disagreement with the statement: "It would be better for my home country if religion were separated from politics."	
	Agree	Disagree
Positive	5	7
Negative	91	89
Neutral	4	4
Total	100	100

- When asked to explain ISIL's popularity amongst its supporters, 22% cited "military achievements", compared to 18% who attributed the group's popularity to its "abiding by Islamic principles". Overall, one-third of respondents credited ISIL's popularity amongst its supporters to a variety of religious considerations, while a majority credited political factors for the support it received. A further 9% of respondents explained ISIL's support amongst those who supported the group with the group's "defense of the Sunni Muslim community", while 13% claimed that ISIL's support was due to the group's defiance of the West, and 6% cited the group's defiance of Iran.

- Respondents' opinions on who created ISIL are more complex. When asked to decide if they believe ISIL is a "foreign creation" or a product of "the [Arab] region, its societies and internal conflicts", 38% of the Arab public chooses the latter, while one half of Arabs regard ISIL to be a product of foreign powers. Yet when the same group of respondents is asked to determine whether they believe the formation and rise of ISIL to be the result of either "existence of religious extremism and fanaticism in Arab societies" or "a product of the policies of the Arab regimes", 48% choose the former while 35% choose the latter.

	Product of own environment	Created by foreign actors	Neither	Don't know
Lebanon	21	77		11
Tunisia	15	73	1	11
Jordan	23	70	4	3
Palestine	29	64	2	5
Iraq	32	62	3	3
Kuwait	45	51	2	2
Algeria	52	41	3	5
Egypt	38	41	2	20
Saudi Arabia	51	37	6	6
Morocco	55	33	2	10
Mauritania	52	30	6	13
Sudan	49	27	8	16
Aggregate	38	50	3	8

- ISIL is a product of its own environment: this region, the societies within it and its conflicts
- ISIL was created by foreign actors
- I do not agree with either of these two statements
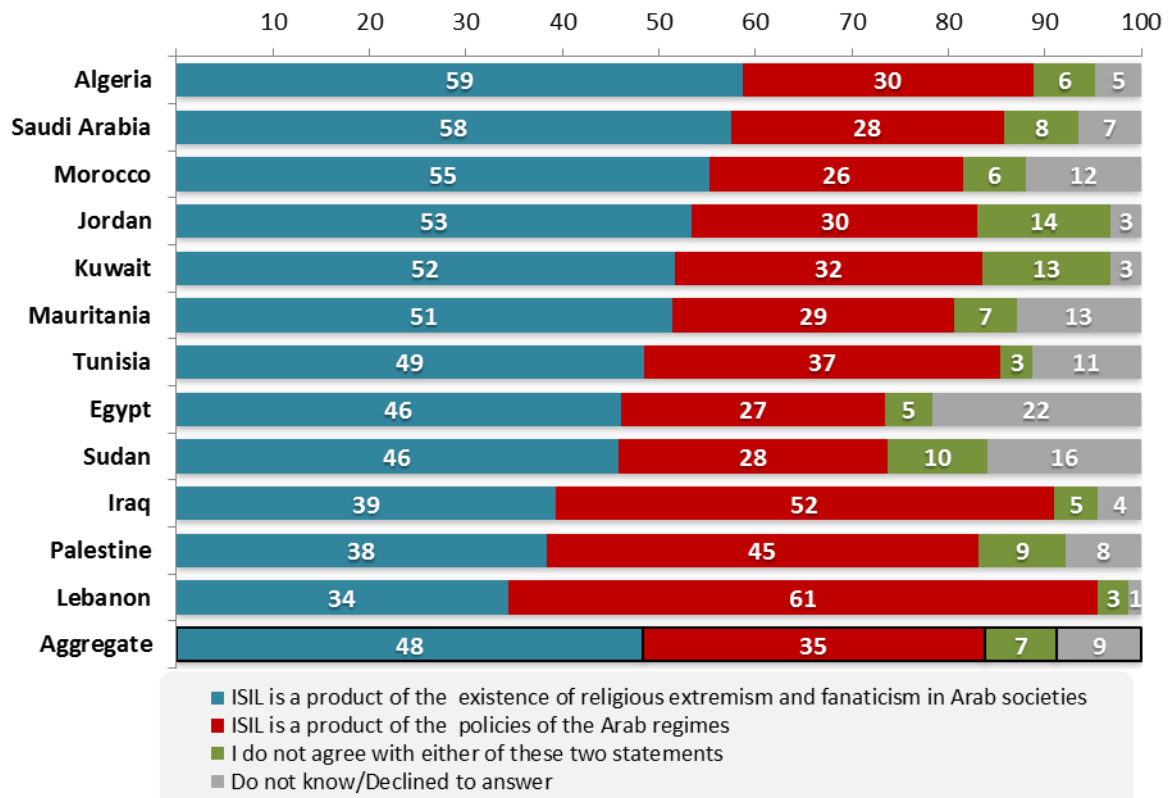- Do not know/Declined to answer

Figure 8.6 & 8.7: Respondents' views on the origins of the group known as ISIL.

- No consensus among the Arab people exists over the best measures by which to combat ISIL and armed terrorist groups in general. This reflects both the complexity of the issue and the nuanced attitudes of the Arab public towards it. Respondents cited the following measures as the most important in combatting ISIL: supporting democratic transition in the region (28%); resolving the Palestinian cause (18%); ending foreign intervention (14%); intensifying the military campaign against ISIL (14%); and solving the Syrian crisis in line with the aspirations of the Syrian people (12%).
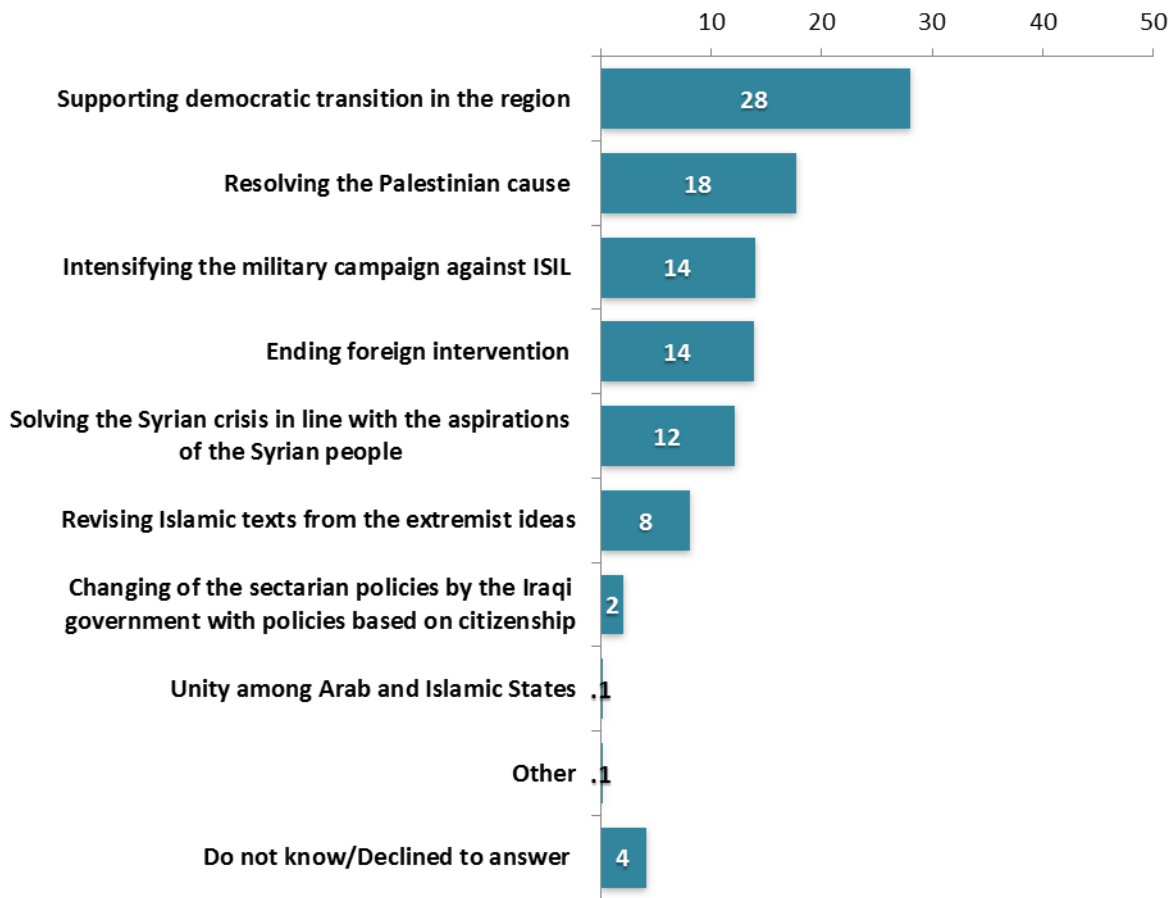
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Figure 8.8 Respondents suggested measures as the most important in combatting ISIL and armed terrorist groups in general.

- Arab public opinion further lacks a clear consensus on the Iranian nuclear agreement (the "Joint Comprehensive Plan of Action", signed on 14 July 2015 in Vienna), which allows Iran to produce electricity from nuclear energy under a controlled regime of fuel imports. Over the aggregate group of respondents, 40% of the public views the Iranian nuclear agreement with varying degrees of positivity. The highest level of support was found in Lebanon, where 65% of respondents supported the deal, while the greatest opposition was found in Jordan, where 50% of the population was opposed to the deal to varying degrees.
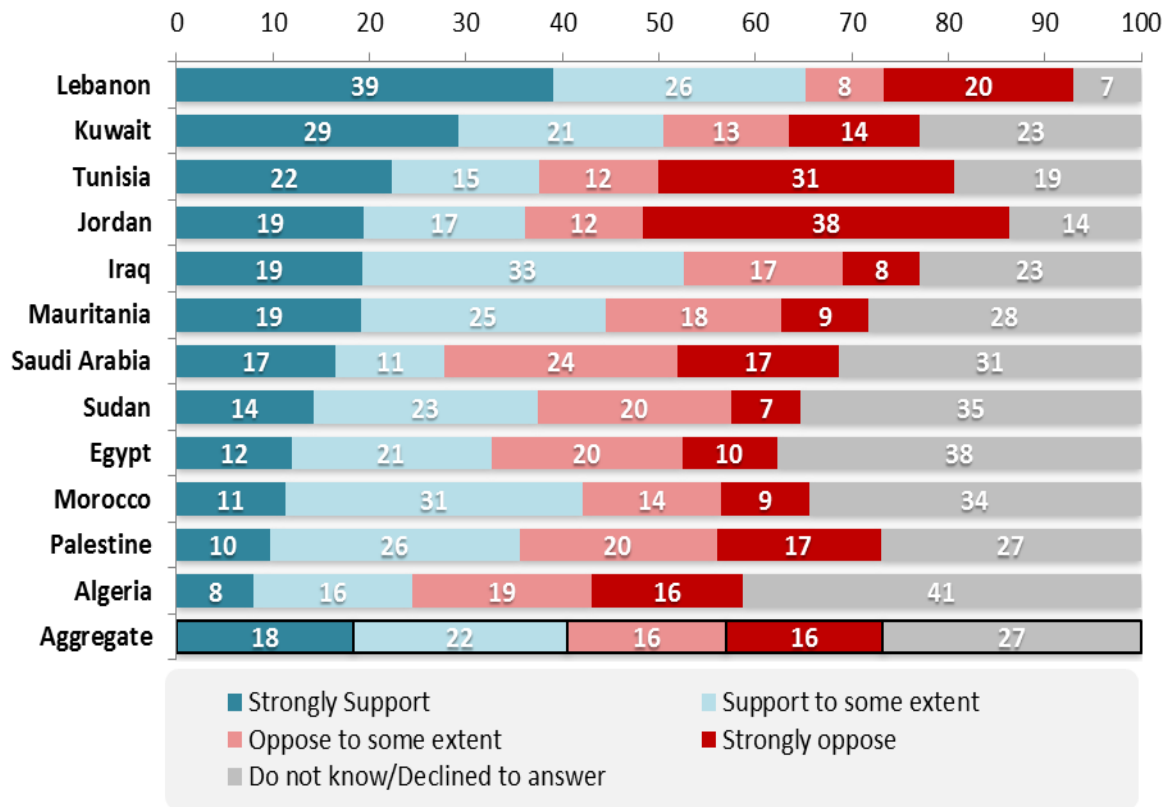
Figure 8.9 Respondents' opposition to/support for Iranian nuclear agreement (the "Joint Comprehensive Plan of Action", signed on 14 July 2015 in Vienna), by their home countries.

- In the general group of respondents, 38% voiced the opinion that the Arab countries were the largest losers of the deal, while a number of different parties were cited by the respondent`s as the biggest beneficiaries of the agreement: Iran (32% of respondents; the United States (31%); Israel (15%) and the Arab countries in general (8%).

- A vast majority of Arabs still believes that best solution for the Syrian crisis is a change of regime in Syria.

Respondents' opinions on which countries stood to gain the most from the Iranian nuclear agreement.

	Iran	The United States	Israel	The Arab countries	Russia	Turkey	Other countries	Do not know/declined to answer
	32	31	15	8	3	0.5	0.1	10

Figure 8.10

	A Change of regime in Syria	A negotiated agreement in which all interested parties were involved	The destruction of both the Syrian revolution and the opposition	The destruction of ISIL, as a prelude to an all-encompassing political resolution	Other measures	
Saudi Arabia	84	2	9	2		3
Jordan	79	6	6	3	2	5
Mauritania	78	8	6	3		4
Sudan	70	5	12	4		9
Morocco	70	4	15	5		7
Kuwait	65	7	10	17		1
Algeria	63	5	21	7		3
Palestine	61	8	14	8	1	9
Egypt	50	8	11	6		25
Tunisia	44	12	8	7	5	24
Iraq	43	11	17	24		5
Lebanon	38	19	19	19	2	3
Aggregate	62	8	12	9	1	8

- ■ A Change of regime in Syria
- ■ A negotiated agreement in which all interested parties were involved
- ■ The destruction of both the Syrian revolution and the opposition
- ■ The destruction of ISIL, as a prelude to an all-encompassing political resolution
- ■ Other measures

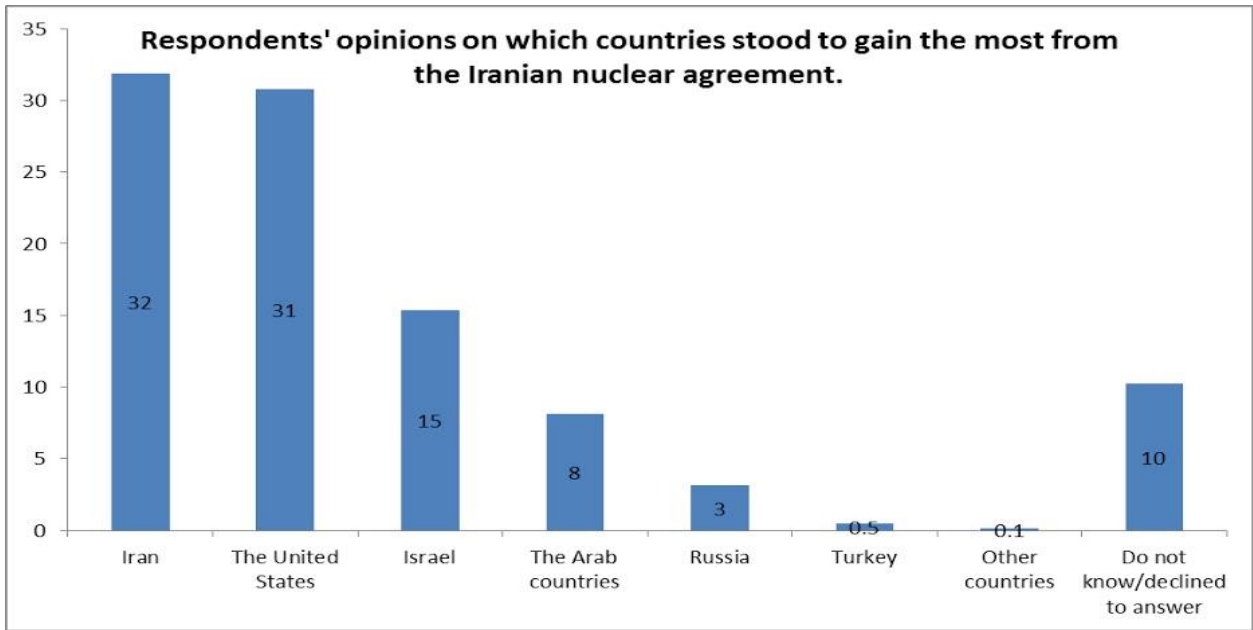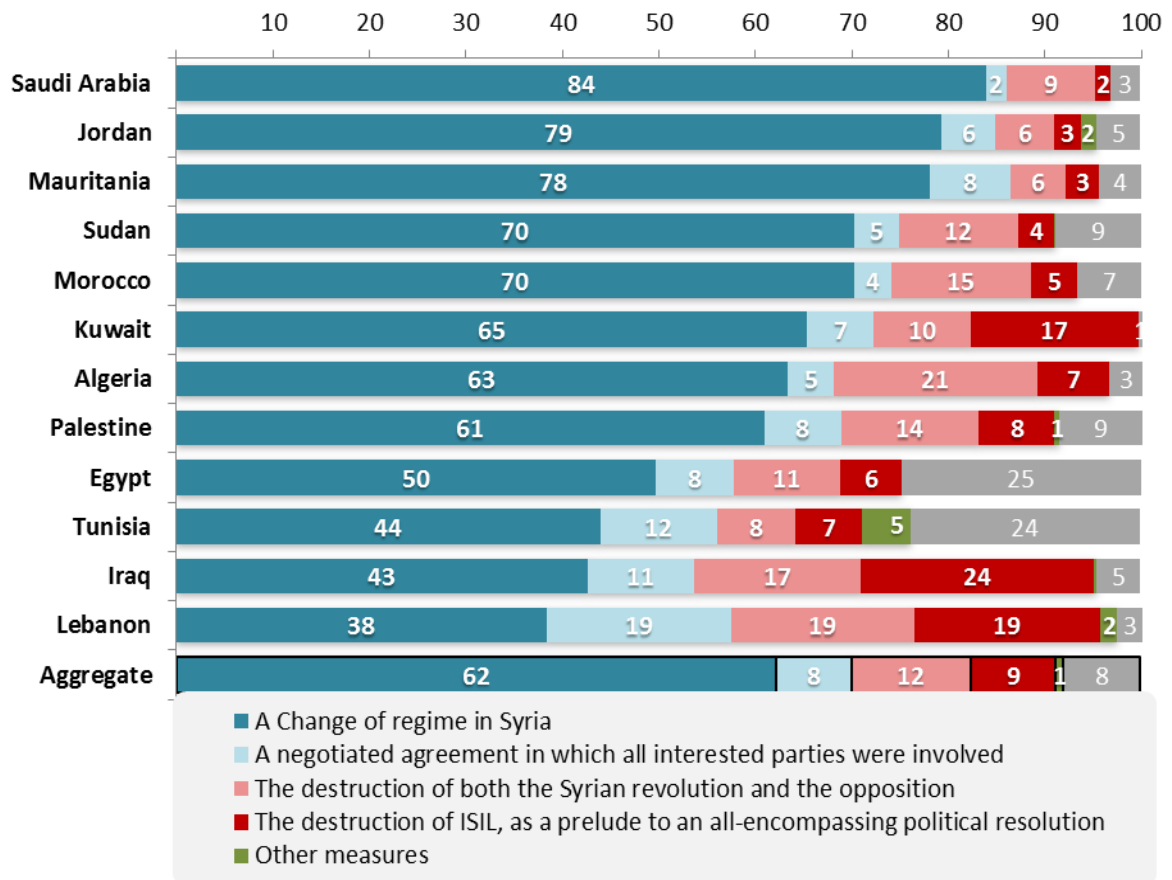**Figure 8.11** Respondents' preferred means by which to end the Syrian Crisis, by their home countries.