



المركز العربي للأبحاث ودراسة السياسات
Arab Center for Research & Policy Studies

The 2019-20

Arab Opinion Index

Main Results in Brief

The 2019-20 Arab Opinion Index: Main Results in Brief

The 2019-2020 Arab Opinion Index is the seventh in a series of yearly public opinion surveys across the Arab world, based on the findings from face-to-face interviews conducted with 28,288 individual respondents in 13 Arab countries: Saudi Arabia, Kuwait, Qatar, Iraq, Jordan, Palestine, Lebanon, Egypt, Sudan, Tunisia, Morocco, Algeria and Mauritania. The Arab Opinion Index remains the largest public opinion survey carried out in the Arab world. 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. The overall samples guarantee probability-proportional-to-size (PPS), ensuring fairness in the representation of various population segments.

A total of 69,000 hours of actual work was needed to carry out these surveys by an overall team of 900 individuals, equally balanced on gender. The team covered a total of 820,000 kilometers across the population clusters sampled.

- The results of the index are presented according to the countries surveyed and according to the general average of each Arab region. For the purposes of comparison, the data of the countries surveyed are classified according to the geographical regions of the Arab world, namely:

Arab Maghreb - Mauritania, Morocco, Algeria, and Tunisia

Nile Valley - Egypt and Sudan

The Arab Mashreq - Palestine, Lebanon, Jordan, and Iraq

The Gulf - Saudi Arabia, Kuwait, and Qatar

Section 1: Living Conditions of Arab Citizens

How did the Arab citizens assess their economic conditions?

Figure 1: Self-reported Household Income Level

- Only 27% of respondents, mostly in the Gulf region, reported that their household income was sufficient for them to make savings after their necessary expenditures were covered. A further 43% reported that while their household incomes were sufficient to cover necessary subsistence expenditures, they could not sustain savings. Fully 26 % of respondents reported that they lived “in a state of need,” with household incomes not covering their necessary expenditures. As is expected, the affluent families are concentrated in the gulf Region, while families in need are centered in the Mashreq.
- Of those respondents whose households live “in need,” 51% resort to borrowing from a variety of sources, including family and friends as well as banks and financial institutions to cover their essential expenditures.

- Another 17% of needy families rely on handouts and charitable assistance from friends and family, while 14% on assistance from charitable organizations and government aid, indicating traditional support networks remain stronger than institutional frameworks.

Figure 1: Self-reported Household Income Level over Multiple Waves

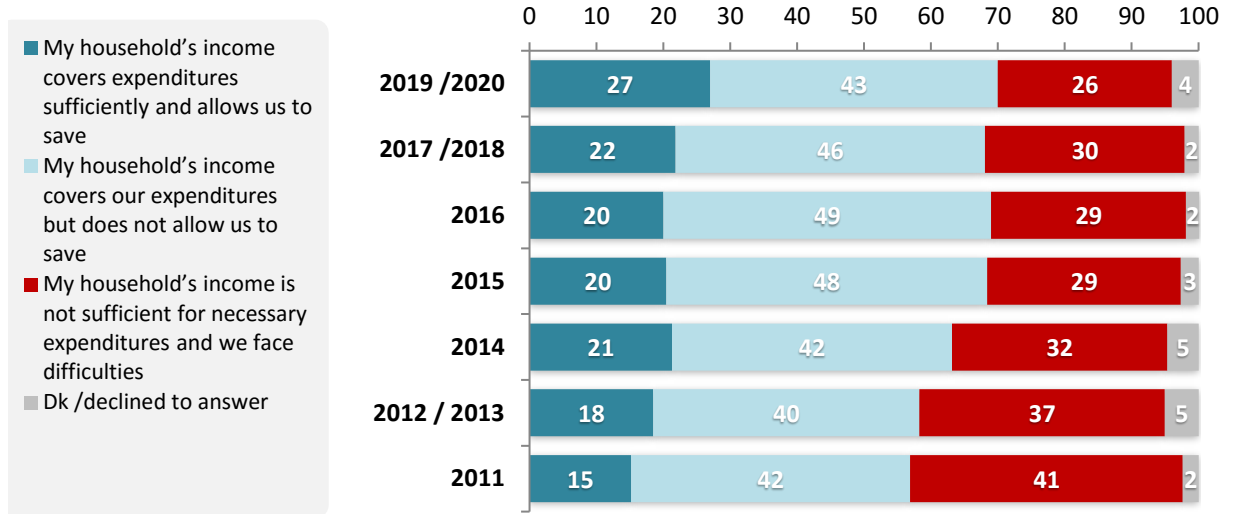
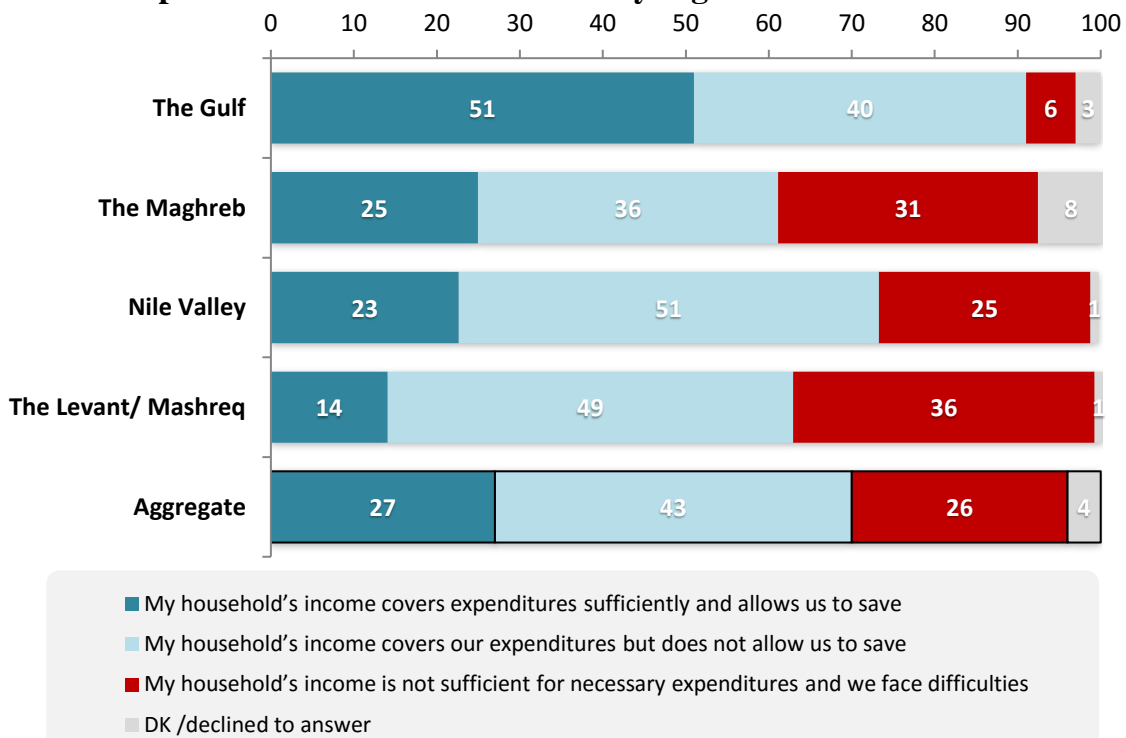


Figure 2: Self-reported household income level by region



How do Arab citizens assess the political and security situations in their countries?

- 69% of the respondents believe that the level of security in their country is good, compared to 30% who said rated it negatively.
- The assessment of the level of safety in the respondents' countries, according to the results of the 2019/2020 poll, is less than what was recorded in the 2018/2017 poll by five points, and higher than what was recorded in the 2015, 2014 and 2012/2013 polls.
- 46% described the economic situation of their countries as good, compared to 52% who evaluated the economic situation of their countries overall negative. The majority of respondents in Arab countries, with the exception of the Gulf countries, evaluated the economic situation in their countries negatively, especially in the countries of the Arab Mashreq.

Figure 3: Respondents assess the economic situation of their countries

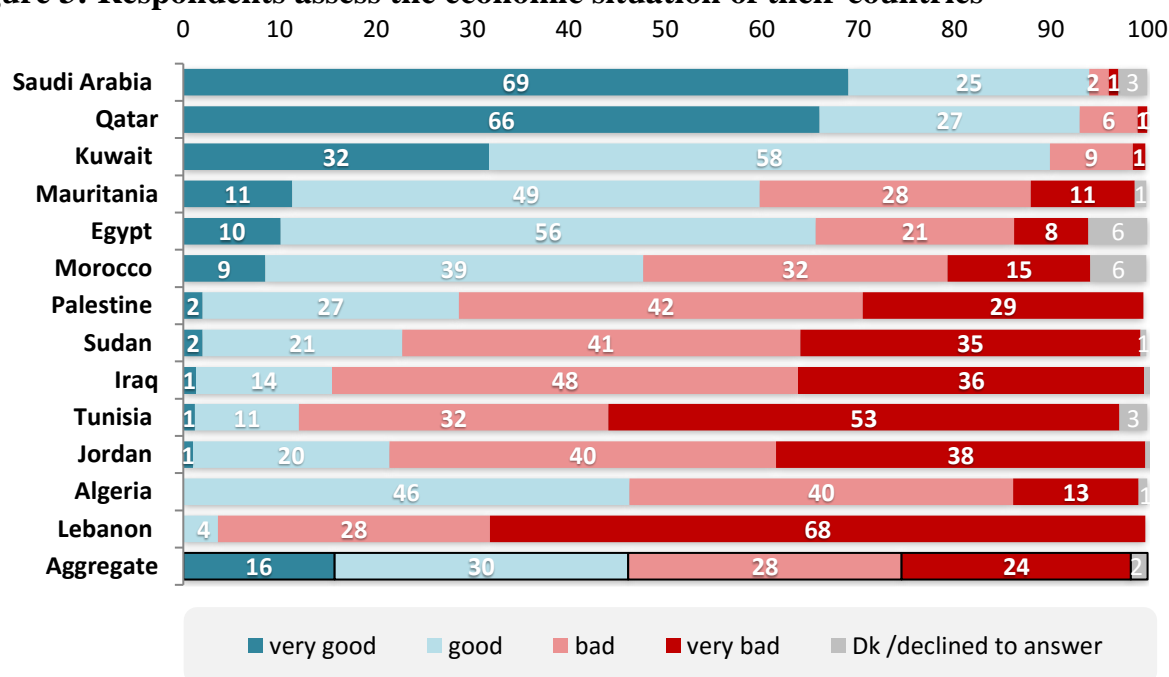


Figure 4: Respondents assess the economic situation of their countries

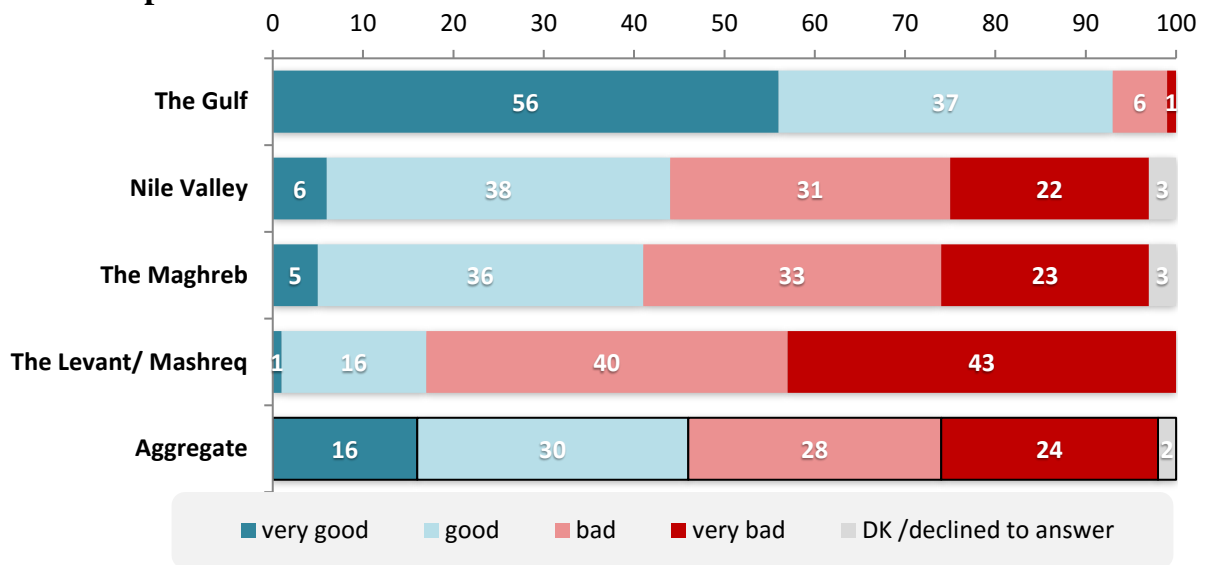
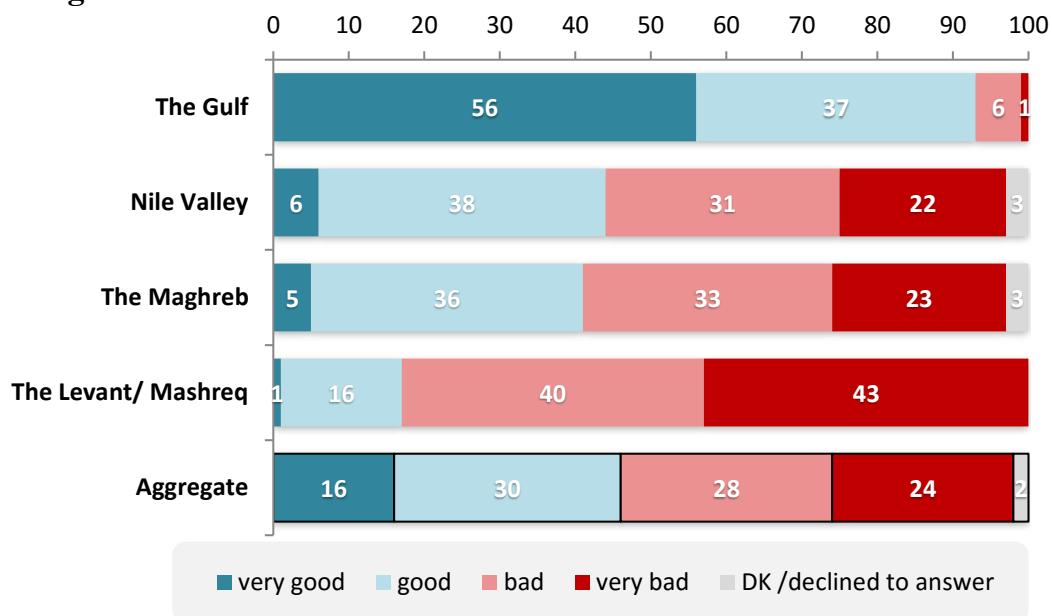


Figure 5: Respondents assess the economic situation of their countries according to the regions of the Arab world



- 48% evaluate the political situation in their countries as positive, compared to 47% who evaluate it as negative. Most respondents in the Gulf states evaluated the political situation as positive.
- Respondent evaluation of the political situation in their countries was the most positive in the 2019/2020, compared to all the previous waves/years of the survey.

Figure 6: Respondents' assessment of the political situation in their countries according to the results of index surveys

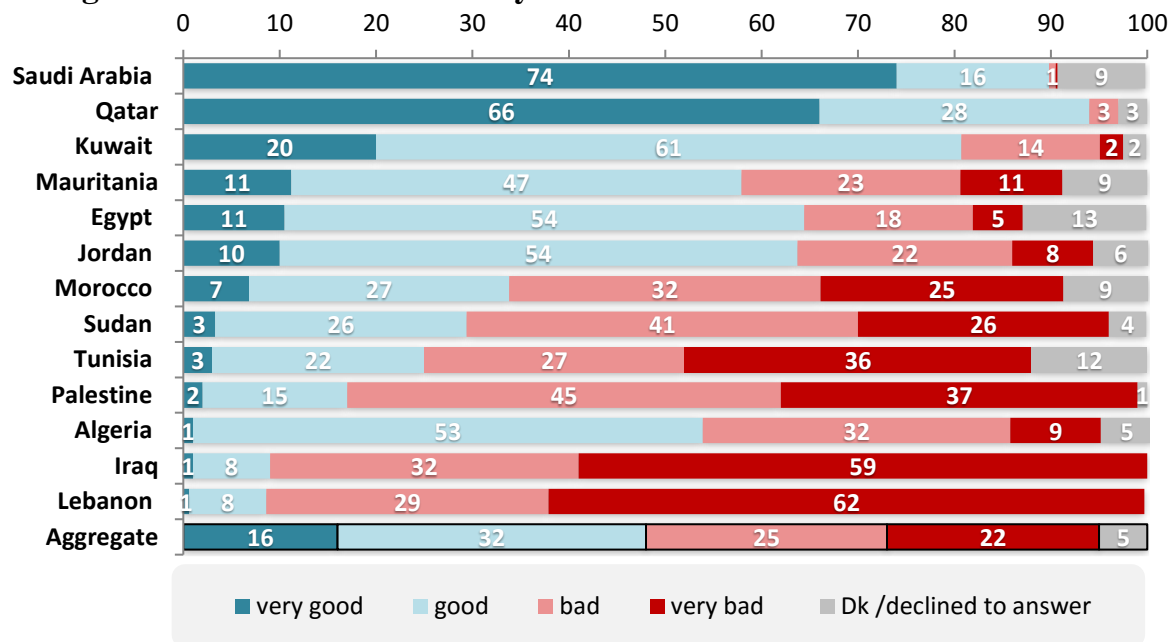
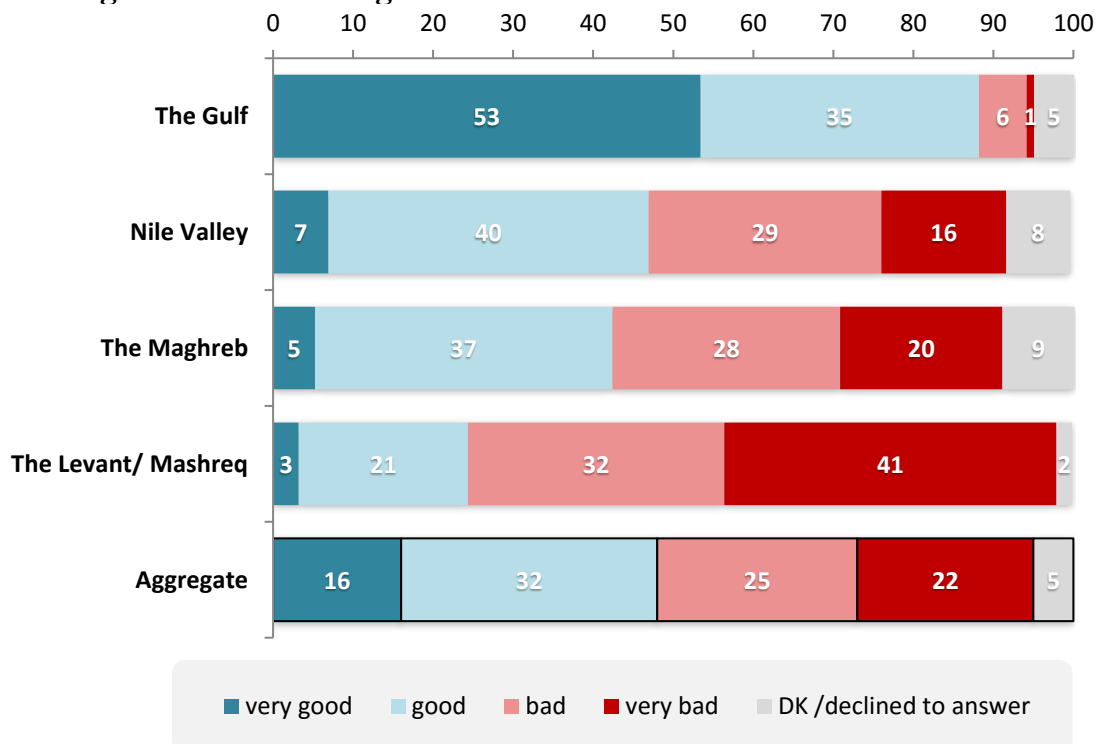


Figure 7: Respondents' assessment of the political situation in their countries, according to Arab world regions



What are the priorities of the Arab citizen?

- The priorities of the citizens of the Arab region are varied, but the largest bloc (57%) said that their priorities are economic in nature. More than half of the citizens mentioned that unemployment, high prices, poor economic conditions, and poverty are the most important challenges facing their country.
- 16% of the respondents mentioned priorities related to government performance and policies, such as weak public services, financial and administrative corruption, governance and its policies, and democratic transition, which are problems that fall within the framework of governance policies and institutions in Arab countries.
- 10% of the respondents said that their priorities are related to issues related to security, safety and political stability.
- **22% of the citizens of the Arab region want to emigrate**, and the majority of them want to do so in order to improve their economic situation. However, about 15% of the respondents who wanted to emigrate said that their motive is education or continuing education, and 12% said that they want to emigrate for political or security reasons.
- More than a quarter of respondents in the Mashreq, Maghreb and Nile Valley countries want to emigrate, compared to 5% in the Gulf countries.

Figure 8: Public opinion trends toward the desire to emigrate, according to AOI results over the years

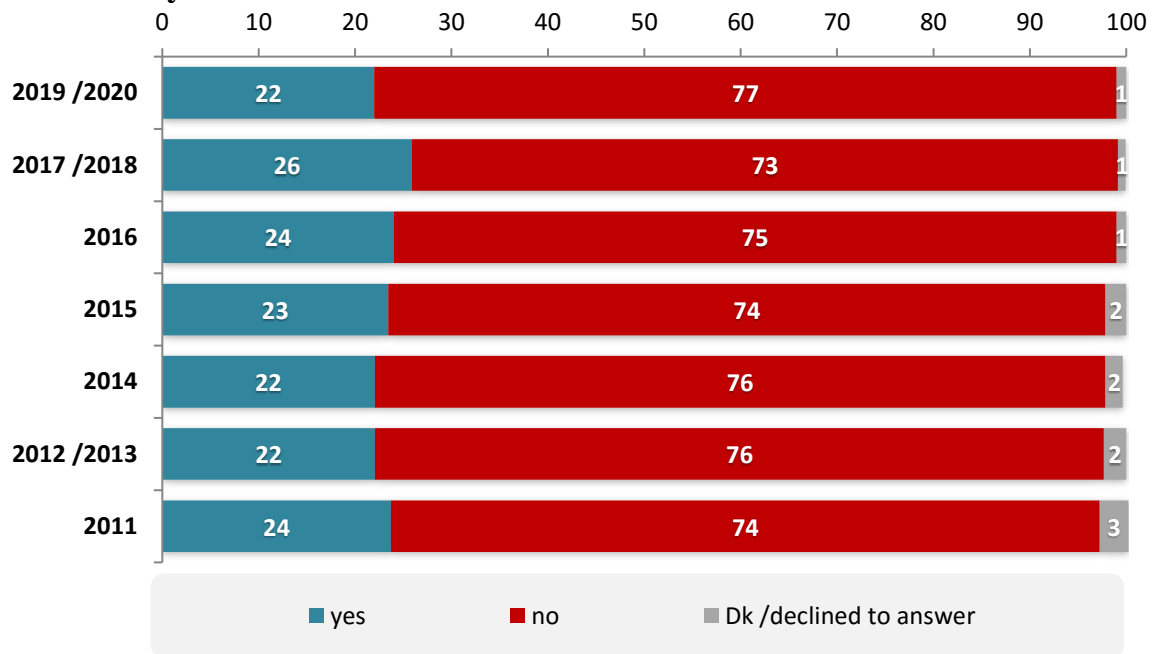
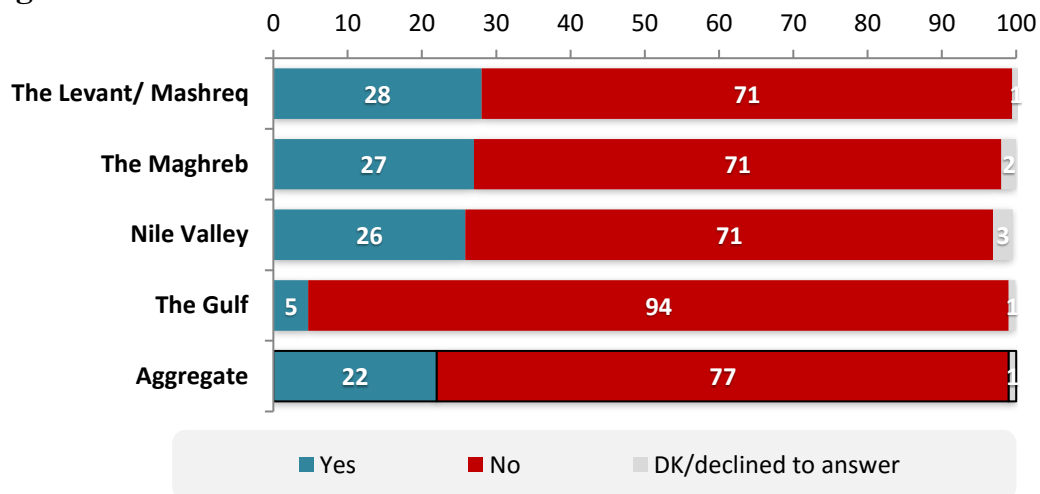


Figure 9: Public opinion trends towards the desire to migrate according to the regions of Arab world



- Respondents' attitudes varied regarding the countries posing the greatest threat to their countries; 22% of the public believe that Israel is the most threatening to the security of their countries, while 14% point to the United States of America as the source of the threat, and 13% Iran. About half of Iraqis believe that Iran is the main threat to the security of their country.
- The largest bloc in Jordan, Palestine, Lebanon, Egypt and Mauritania believes that Israel is the most threatening to their respective countries.
- 47% of the respondents in the Mashreq countries said that Israel is the main threat to their countries. While 27% of the Arab Gulf region respondents stated that Iran is the first threat. For threats facing the Arab region, Israel occupied the first place as a threat to the Arab region in the eyes of the respondents from all countries, and from each country separately.

Figure 10 :Public opinion trends towards countries most threatening to respondents' countries

Country of threat Country	Israel	America	Iran	Neighboring Arab countries	Arab states	France	Turkey	Other states	European states	Non-Arab neighboring or regional states	Armed semi-state groups	Don't know/refuse to answer	There is no source of threat	Total
Jordan	51	12	7	4	1	0	0	0	0	0	0	7	18	100
Tunisia	11	11	0	14	19	0	1	0	1	0	0	43	0	100
Algeria	11	2	0	1	1	61	0	0	0	0	0	14	10	100
KSA	4	3	39	5	0	0	1	0	0	0	0	38	10	100
Sudan	24	37	6	15	2	0	0	1	0	4	0	7	4	100
Iraq	6	31	50	3	0	0	5	0	0	0	0	5	0	100
Palestine	81	13	1	3	1	0	0	0	0	0	0	1	0	100
Kuwait	23	25	34	1	0	0	2	1	0	0	0	6	8	100
Lebanon	48	17	19	5	2	0	1	2	0	0	0	4	2	100
Egypt	25	10	4	14	17	0	18	2	0	0	0	4	6	100
Morocco	3	3	1	20	2	2	0	1	2	0	5	24	37	100
Mauritania	13	12	2	5	3	3	0	2	0	2	0	58	0	100
Qatar	3	7	9	55	0	0	0.3	0.3	0	0	0	10	15	100
Average	23	14	13	11	4	5	2	1	0	0	0	18	9	100

Figure 11 : Public opinion trends towards the most threatening countries according to regions of the Arab world

	Arab Mashreq	Nile Valley	Arab Maghreb	Gulf	Overall Average
Israel	46.5	24.5	9.5	9.3	23
America	18.3	23.5	7.0	11.3	14
Iran	19.3	5.0	0.8	27.0	13
Neighboring Arab countries	3.8	14.5	10.0	19.7	11
Arab states	1.0	9.5	6.3	0.0	4
France	0.0	0.0	16.5	0.0	5
Turkey	1.5	9.0	0.3	1.0	2
Other states	0.5	1.5	0.8	0.7	1
European states	0.0	0.0	0.8	0.0	0
Non-Arab neighboring or regional states	0.0	2.0	0.5	0.0	0
Armed semi-state groups	0.0	0.0	1.3	0.0	0
don't know / declined to answer	4.3	5.5	34.8	24.0	18
there is no source of threat	5.0	5.0	11.8	7.0	9
Total	100	100	100	100	100

Figure 12 : There are many sources of threat to an individual. In your opinion, what are the three most important sources of threat?

	Top source of threat	2 nd most important threat	3 rd most important threat	Average
Drugs	18	18	11	16
Terrorism	14	10	8	11
External risks / external interventions	10	9	8	9
The gap between the rich and the poor	9	8	11	9
Water scarcity	8	5	4	5
Climate change	7	4	4	5
Cyber security / cyber attacks	7	6	5	6
Crime	6	12	11	10
Political instability (political polarization and political conflicts)	5	5	7	6
Environmental pollution	3	5	5	4
Tensions in the Region	3	4	4	4
Societal tensions	2	3	4	3
Forced migration	2	3	4	3
Expatriates	1	1	1	1
Regional divisions	1	1	2	2
Sectarian divisions	0	1	1	1
Sectarian tensions	0	1	1	1
Others	0	0	0	0
don't know / declined to answer	4	--	--	4
No second / third option	--	4	9	6
Total	100	100	100	100

Figure 13: There are many sources of threat that can affect an individual. In your opinion, what are the most important sources of threat?

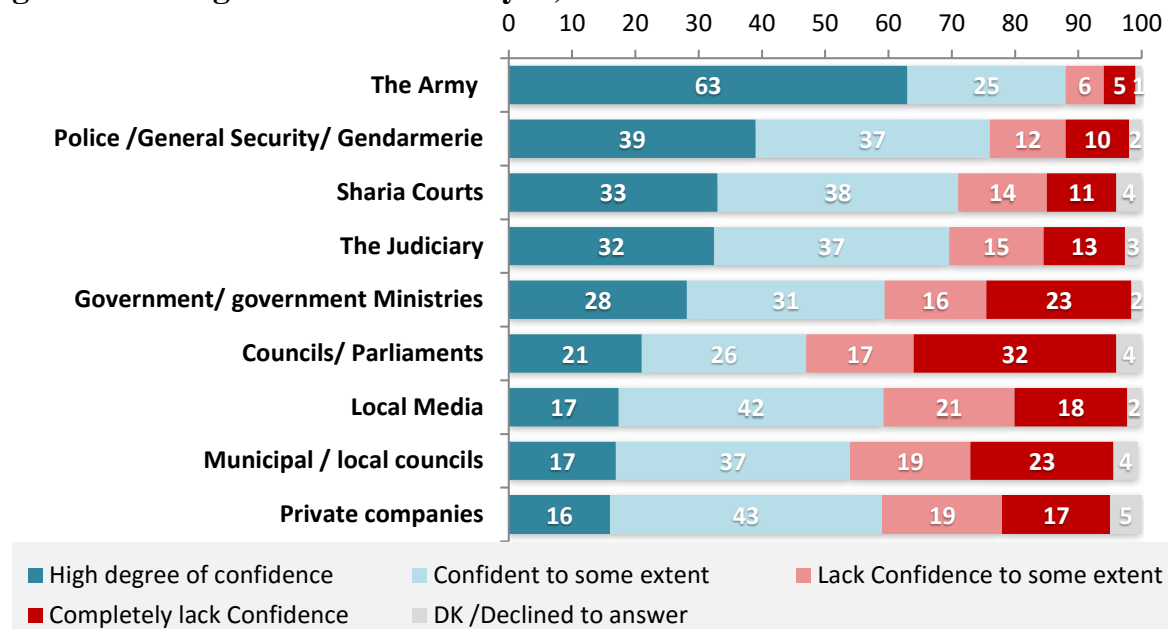
	Arab Mashreq	Arab Maghreb	Nile Valley	Gulf	Overall Average
Drugs	24	20	15	11	18
Terrorism	8	16	15	17	14
External risks / external interventions	13	3	9	14	9
The gap between the rich and the poor	8	14	7	4	9
Water scarcity	3	12	13	5	8
Climate change	3	8	11	7	7
Crime	6	10	7	2	7
Cyber security / cyber attacks	4	2	5	15	6
Political instability (political polarization and political conflicts)	12	4	6	1	6
Tensions in the Region	3	1	3	3	3
Environmental pollution	4	3	4	2	3
Forced migration	3	1	1	1	2
Societal tensions	2	2	1	2	2
Regional divisions	1	1	1	1	1
Expatriates	--	--	--	4	1
Sectarian divisions	2	--	--	0	1
Sectarian tensions	2	--	--	0	1
Others	1	0	0	1	0
don't know / declined to answer	1	2	0	11	3
Total	100	100	100	100	100

Section 2: Perceptions of State Institutions and Governmental Effectiveness

Citizens' confidence in state institutions

- The confidence of Arab citizens in state institutions in their countries varied; while their confidence is high, especially in the military and public security institutions, the confidence in judicial, executive, and legislative branches are low. Representative legislative councils received the least amount of confidence.

Figure 14: The extent of citizen confidence in the institutions of their countries (the general average in societies surveyed)



- Public opinion is divided over the evaluation of the performance of legislative councils in Arab countries with regard to their oversight of governments, or their representation of social groups and sects. Half of the respondents believe that these councils fulfil their role at these levels, while about half believe that they do not. Input from Tunisia and Kuwait boosted positive ratings for such councils.

Figure 15: Respondent evaluation of the performance of their representative legislative councils in their duty to oversee governments

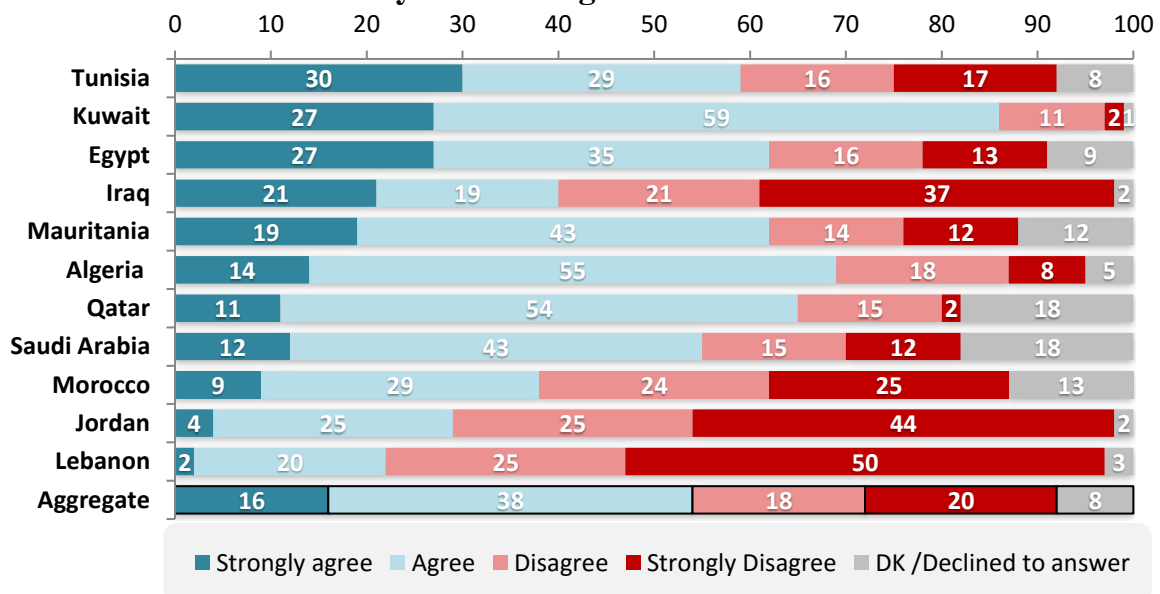
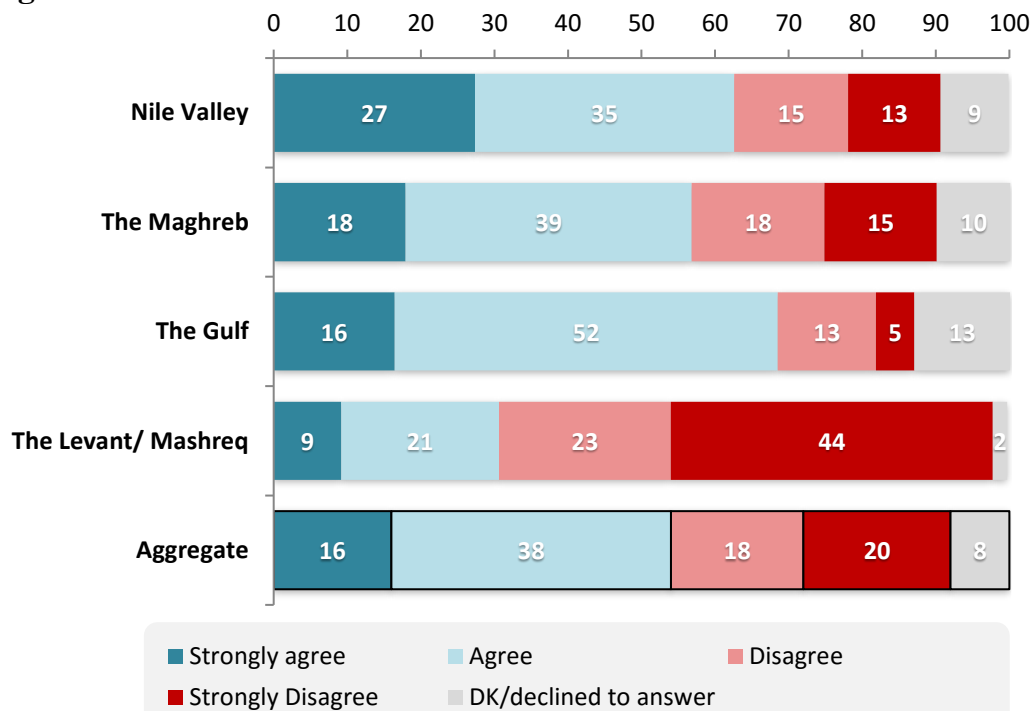


Figure 16: Respondent evaluation of the performance of their representative legislative councils in their duty to monitor governments according to Arab world regions



How does public opinion evaluate government performance?

- The evaluation of the performance of governments at the level of foreign policies, economic policies, and in a range of public policies and services, is generally not positive; 43% to 50% (depending on the country) of respondents evaluated government performance as positive, and this evaluation roughly coincides with the public's evaluation of government performance in previous AOI polls.
- There is a clear consensus among the Arab public that financial and administrative corruption is varied across their countries: 91% of the Arab public believes that corruption is widespread in their home countries, compared to only 7% who believe that corruption is not widespread at all. Data also indicate, over the course of seven years (since 2011), that citizen perceptions and opinions regarding the extent of corruption in their countries have not changed substantially. Respondents in the Mashreq countries are most certain of the spread of corruption in their countries, while the highest rates were recorded in the Gulf countries that corruption was not widespread.

There is a prevailing belief at the level of public opinion that corruption is widespread in both the public and private sectors, albeit in greater proportions in the public sector.

- 43% of the respondents believe that the category of politicians contributes most to the spread of financial and administrative corruption, followed by businessmen at 23%, then senior state employees, 16%.

Figure 17: Public opinion trends towards the extent of financial and administrative corruption in the countries of respondents in AOI polls over the years

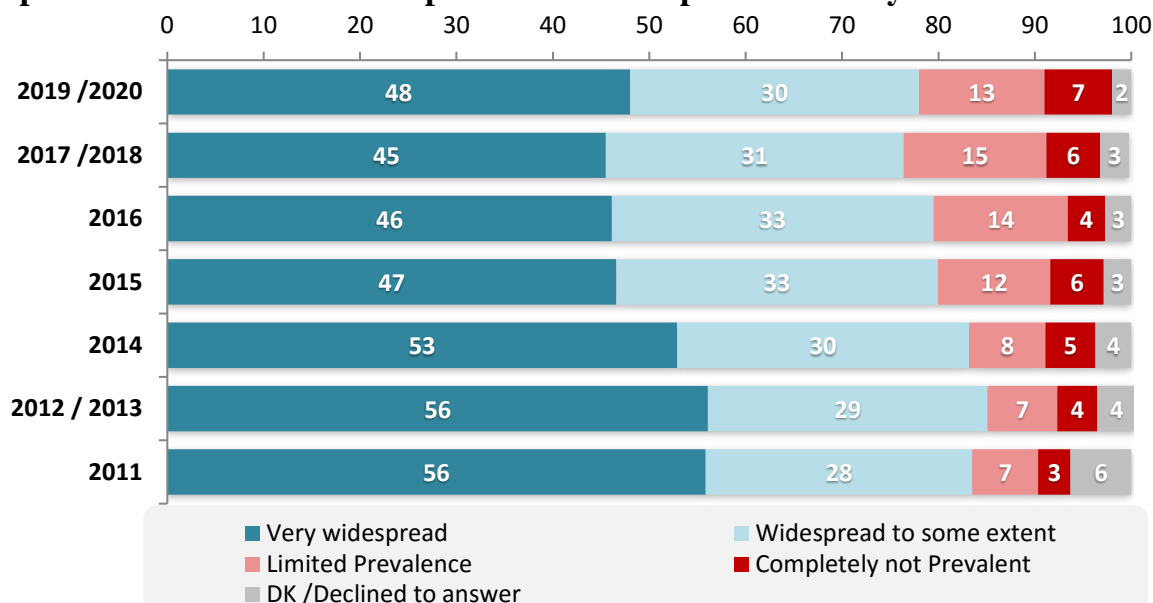


Figure 18: Public opinion trends towards the extent of financial and administrative corruption, according to Arab world regions

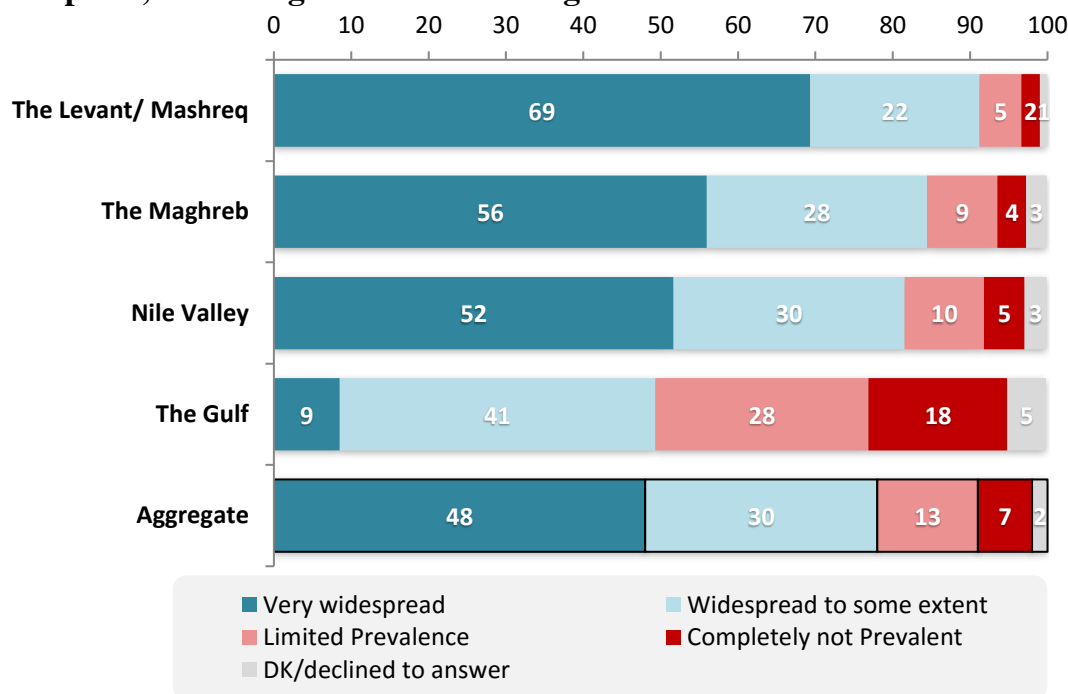


Figure 19: The trends of Arab public opinion towards the extent of the spread of financial and administrative corruption in the public and private sectors

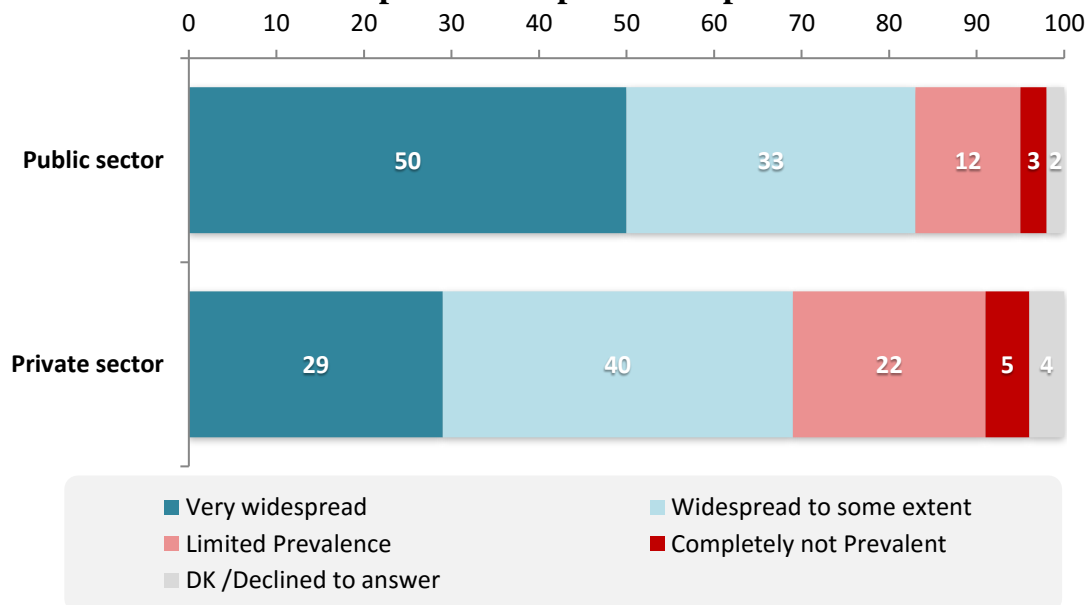


Figure 20: The trends of Arab public opinion towards the extent of the spread of financial and administrative corruption in the public sector and the private sector, according to Arab world regions

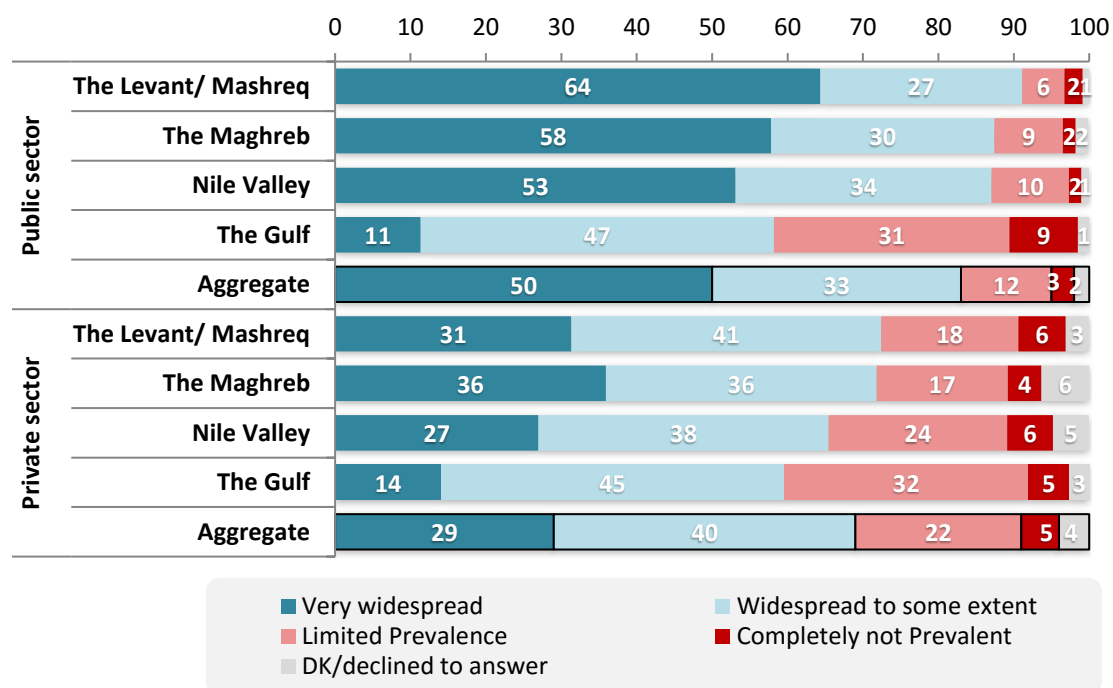


Figure 21: Which of the following groups contributes the most to the spread of corruption in your country?

	Most contributing	2 nd most contributing	Average
Politicians	43	15	29
Businessmen	23	25	24
Senior State Employees	16	30	23
Municipality heads, mayors	4	10	7
Junior employees	6	6	6
Media and Press figures	3	6	5
Others	1	0	1
I don't know/won't reply	4	--	2
No other choice	--	8	4
Total	100	100	100

32% of the respondents said that their countries apply the law equally among citizens, while 46% think that they apply the law but favor some groups, that is, discriminate in their interest, and 20% think that they do not apply the law equally at all.

Figure 22: Public opinion trends towards the extent to which the state applies the law equally among people in AOI over the years

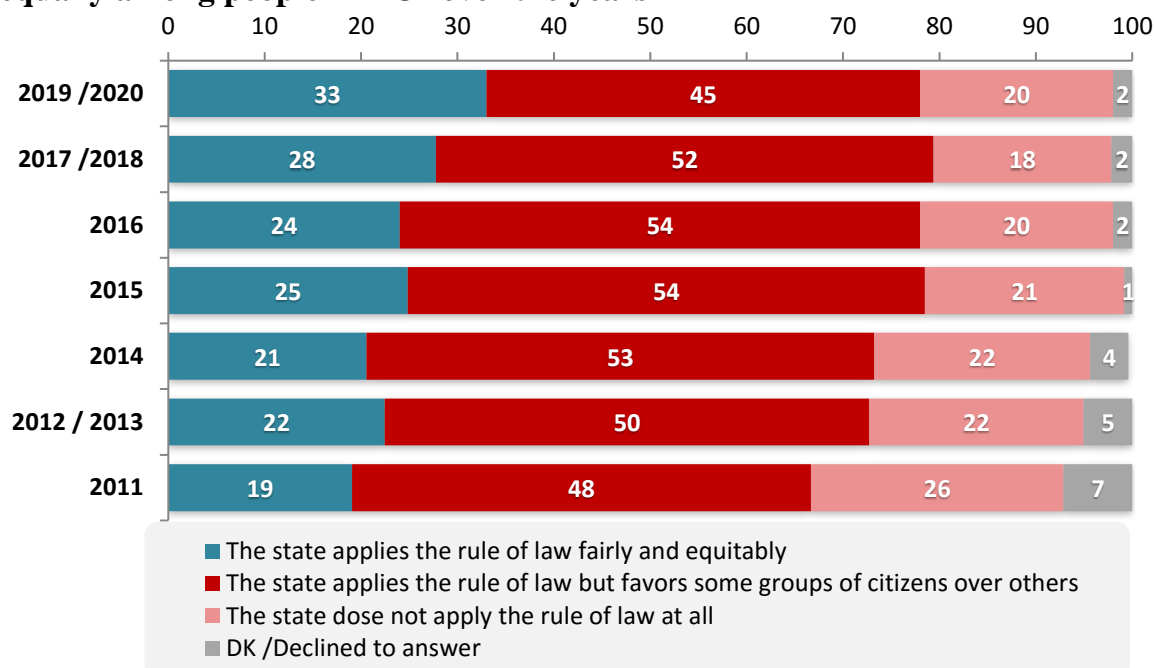
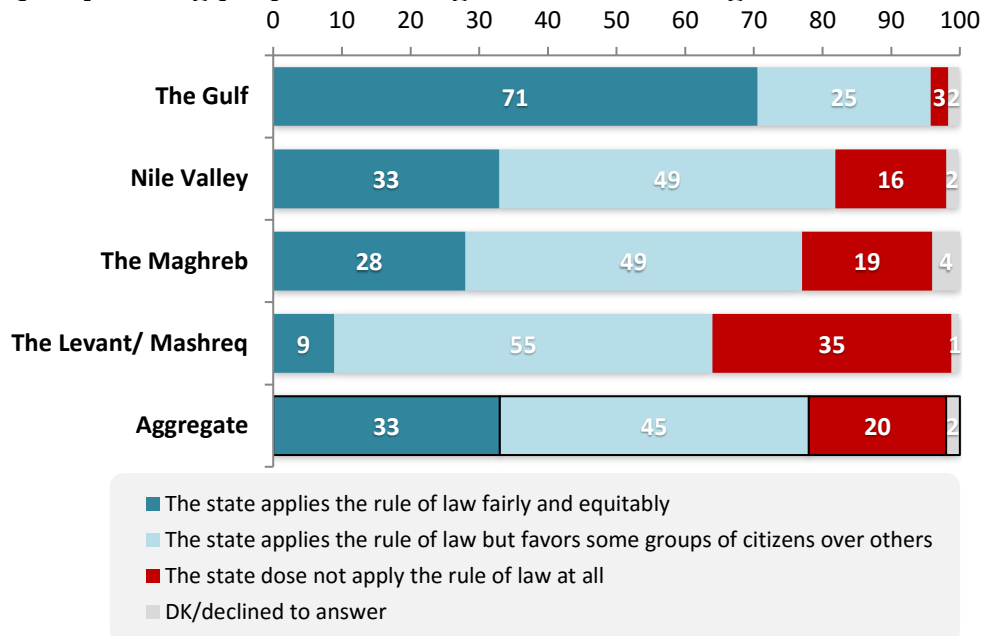


Figure 23: Public opinion trends towards the extent to which the state applies the law equally among people according to Arab world regions



Public opinion was divided regarding the extent to which the principle of a fair trial is applied in the respondents' countries. 62% said it was applied, while 35% said it was not.

Figure 24: Public opinion trends towards the extent to which the principle of a fair trial has been applied in the Index survey over the years

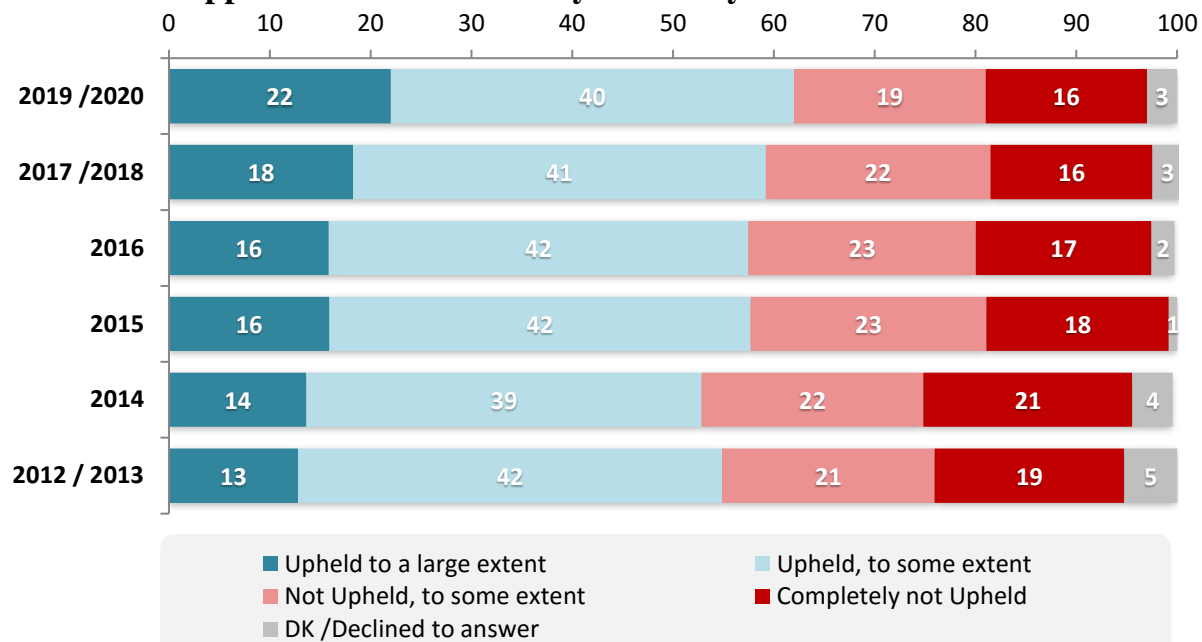
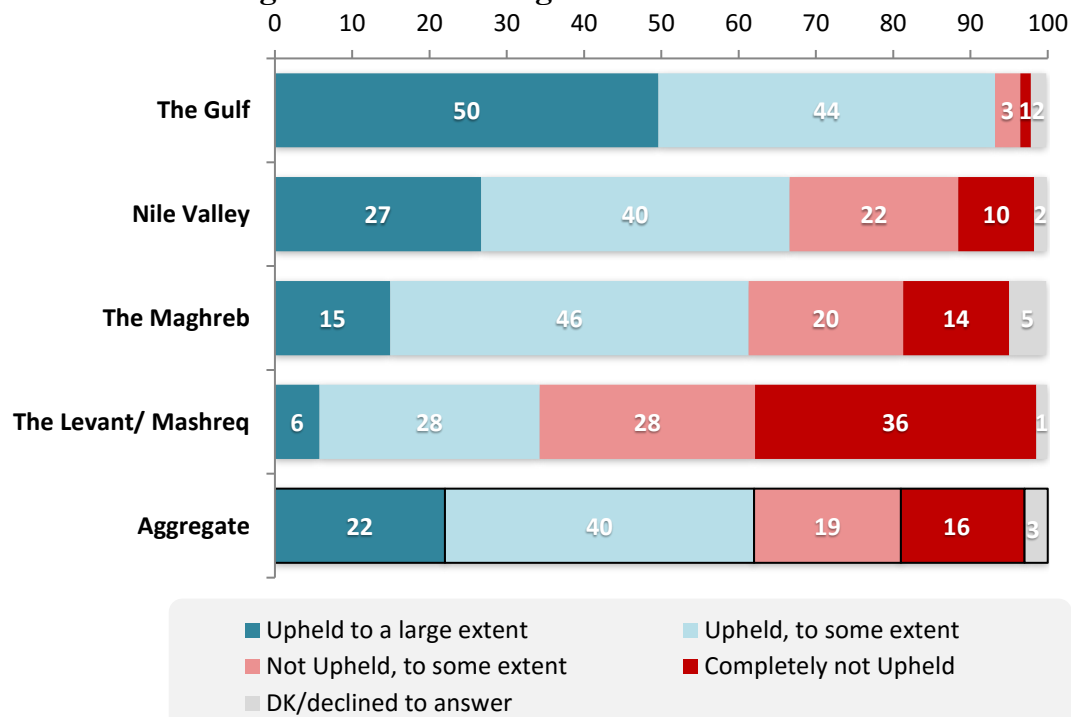


Figure 25: Public opinion trends towards the extent of applying the principle of a fair trial according to Arab world regions

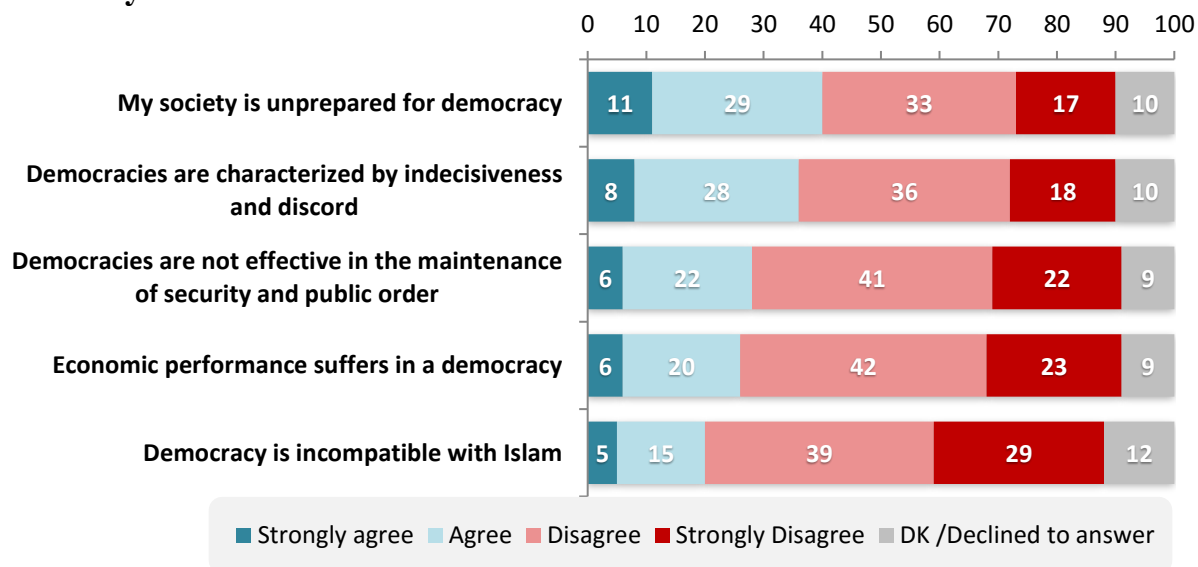


Section 3: Arab Public Attitudes towards Democracy

How does Arab public opinion understand democracy?

- Citizens of the Arab region can provide a definition of democracy; 89% of respondents provided a definition with content.
- 39% of the citizens of the Arab region define democracy as a guarantee of political and civil freedoms. 20% of them said that democracy is a guarantee of equality and justice among citizens, 14% focused on participation and the institutional aspect of a democratic system (circulation of power, separation and control between the authorities), 9% defined democracy as a guarantee of security and stability, and 7% defined it as improving economic conditions.
- The results show an increase in the percentage of those who defined democracy as participation and the institution of democratic governance (circulation, separation, and oversight between authorities), especially in countries such as Egypt, Jordan, and Mauritania.
- The majority of the citizens of the Arab region reject statements with negative content about democracy, but they are divided on the statement that our society is not prepared to practice the democratic system.

Figure 26: Supporters and opponents of some statements about the democratic political system



- A majority of public opinion supports the democratic system, with a rate of 76%, compared to an opposition of 17%.
- Despite the close support for democracy throughout the Arab region, support rates were highest in the Levant and Maghreb regions.

Figure 27: Supporters and opponents of the saying, “The democratic system, even if it has its problems, is better than other systems,” in AOI over the years

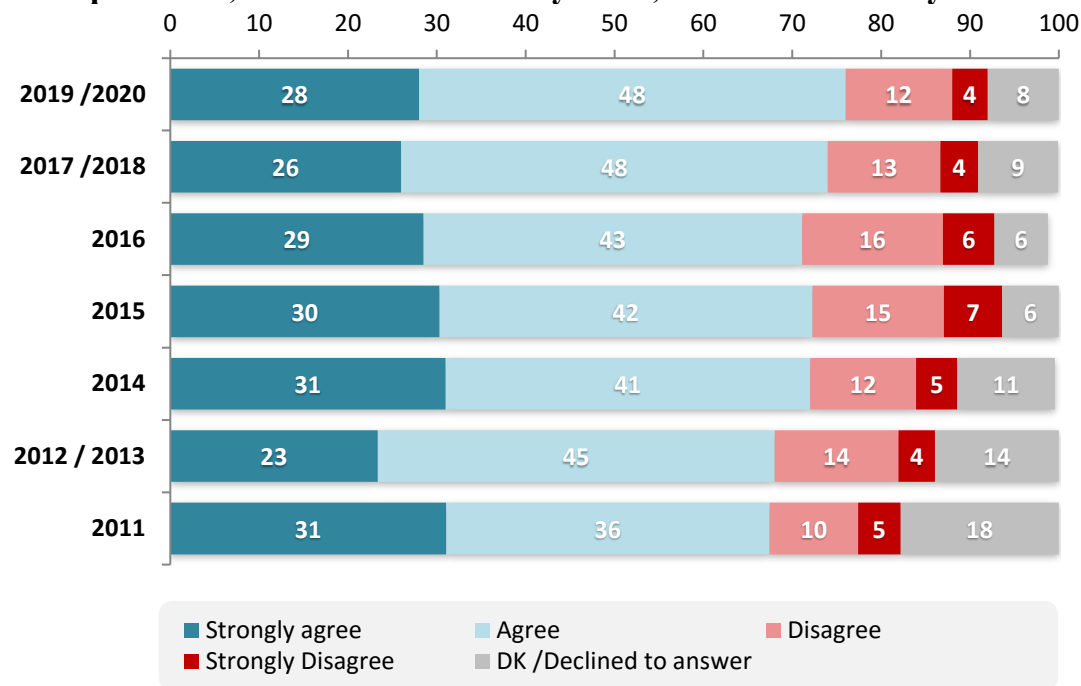
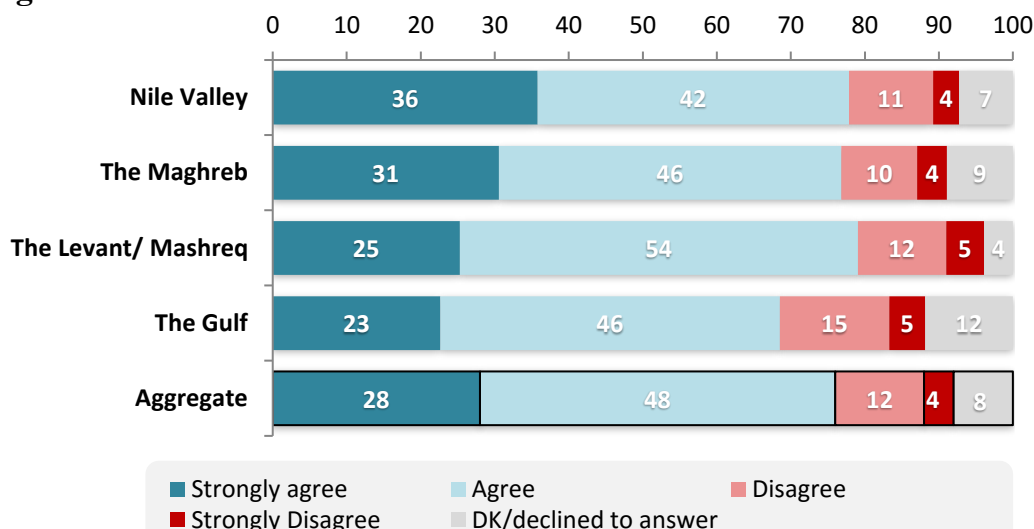
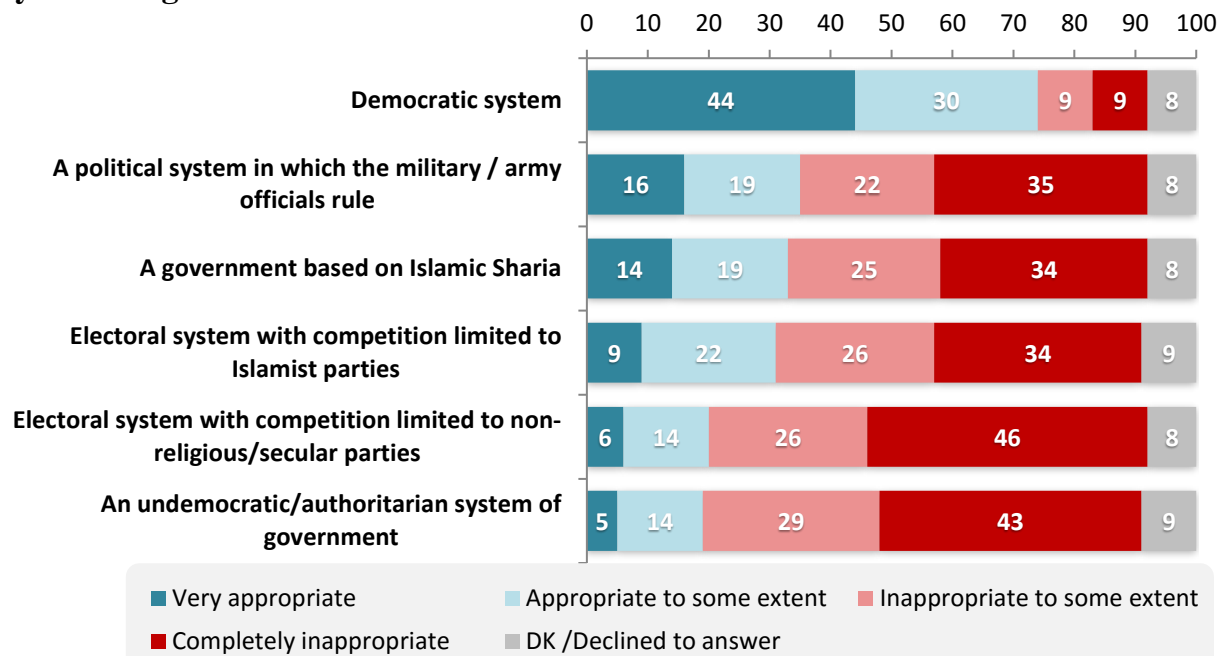


Figure 28: Supporters and opponents of the statement “The democratic system, even if it has its problems, is better than other systems” according to Arab world regions



The majority of respondents (74% consensus) believes that democracy is the most appropriate system of governance for their home countries, when asked to compare democracy to other systems (such as authoritarian regimes, representative democracies where electoral competition is limited to either Islamist or non-Islamist/secular political parties, or to theocracies).

Figure 29: Public opinion trends toward the suitability of a set of political systems as systems of government for their countries



51% of the respondents in the Arab region **accept the arrival of a political party with whom they do not agree to power through the ballot box**, compared to 43% who said that they do not accept that. The percentages of approval for this are the lowest compared to previous polls. The highest of these percentages were recorded in the Nile Valley region and the lowest in the Gulf region.

Figure 30: Public opinion trends toward a political party taking power in a free and fair election, by year

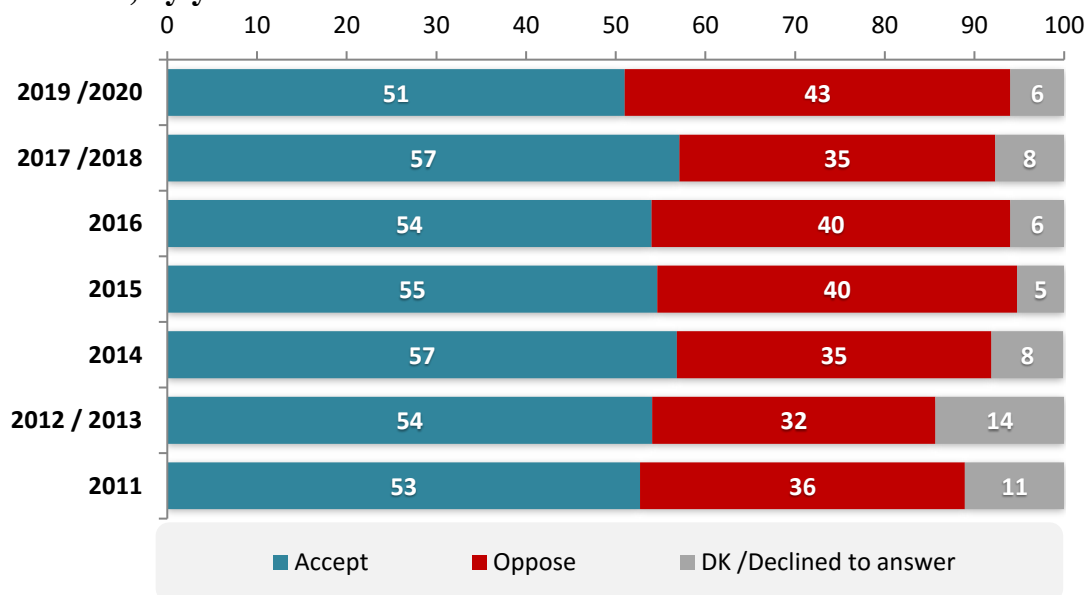
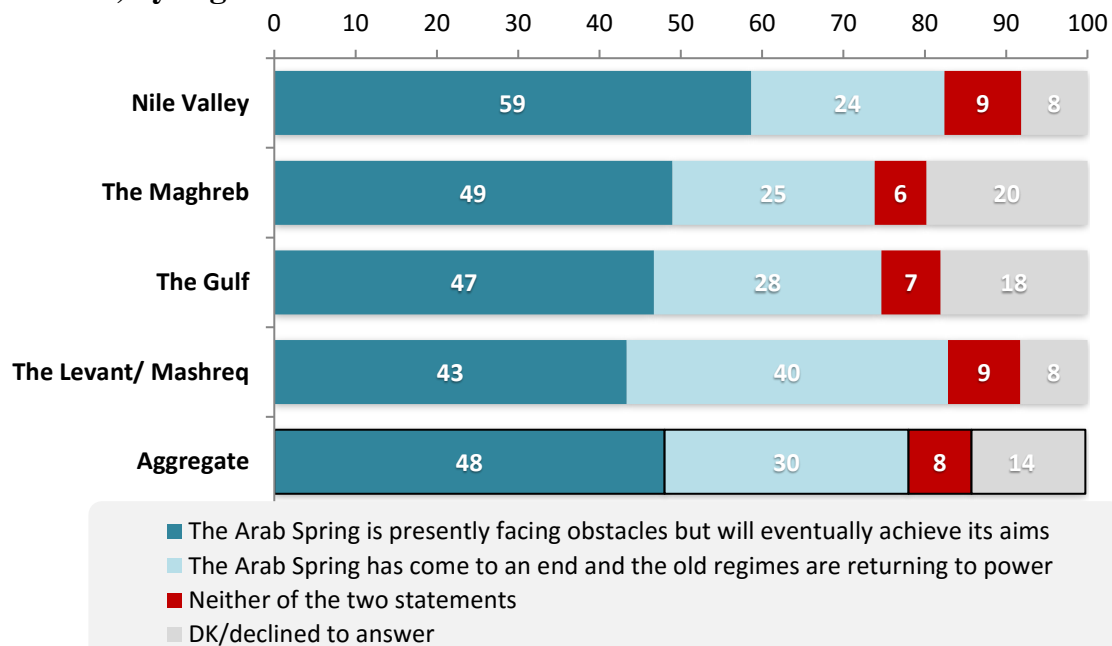


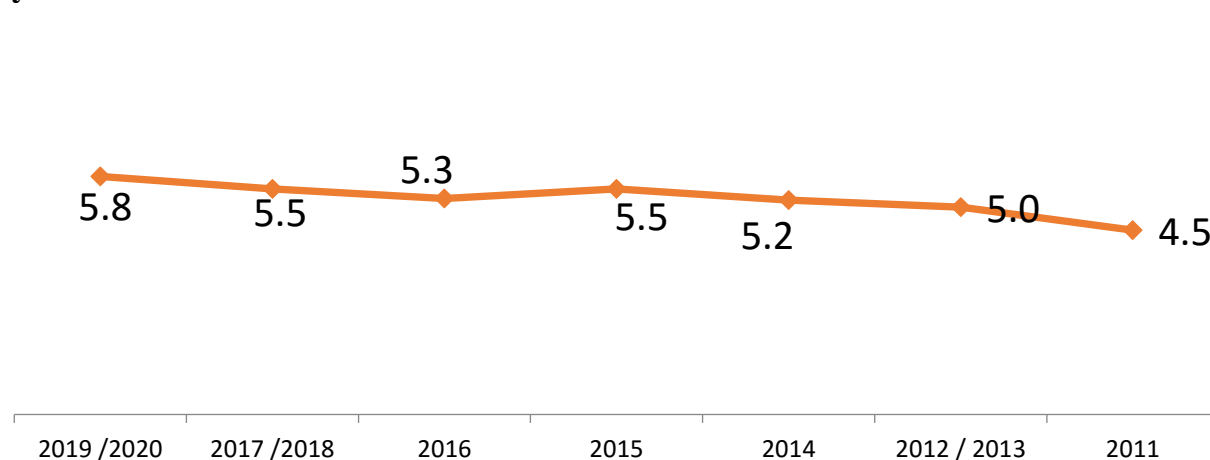
Figure 31: Public opinion trends toward a political party taking power in a free and fair election, by region



How do Arabs establish democracy in their countries?

- This consensus on support for democracy is accompanied by a negative evaluation of existing democracy in the Arab World. Respondents placed the level of democracy in the region at 5.8/10 – that is, democracy remains, as far as they are concerned, only halfway there.

Figure 32: Assessing the level of democracy in countries surveyed by AOI over the years



- The evaluation of the level of democracy, through the criterion of the ability of citizens to criticize the government without fear, indicates **that 30% of the respondents say it is not possible to criticize the government without fear, compared with 27% in the 2012 poll.** In fact, the majority of respondents in some societies (such as Palestine and Saudi Arabia) reported that they cannot criticize the government without fear.
- Arab citizen evaluations of their ability to criticize the governments of their countries on a scale of 1 to 10 also showed limited ability to criticize their own governments; this criterion received a score of 6.0 out of 10. Tunisia, Sudan, and Mauritania got the best scores, while Palestine and Saudi Arabia scored the lowest in this regard.
- Respondent ability to criticize the governments of their countries was the highest in the Arab Maghreb region, and the lowest in the Gulf region.

Figure 33: Assuming there is a numerical scale from 1 to 10, where 1 means the inability to criticize the government and the number 10 means full ability to criticize the government, how much are you able to criticize your country's government?

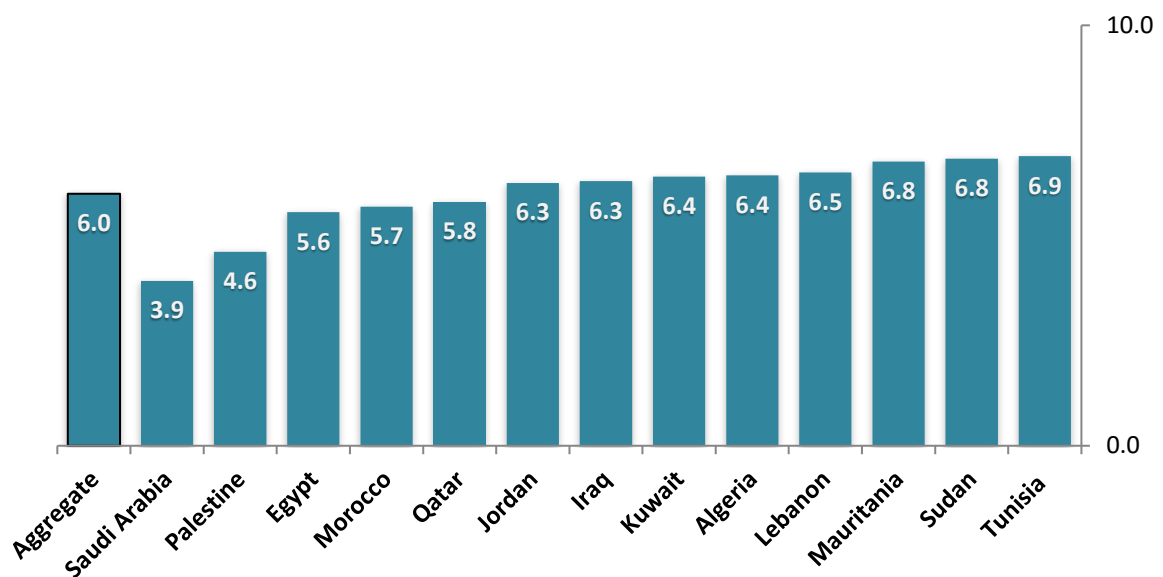


Figure 34: Evaluating the level of democracy in the countries surveyed and the ability of citizens to criticize the government

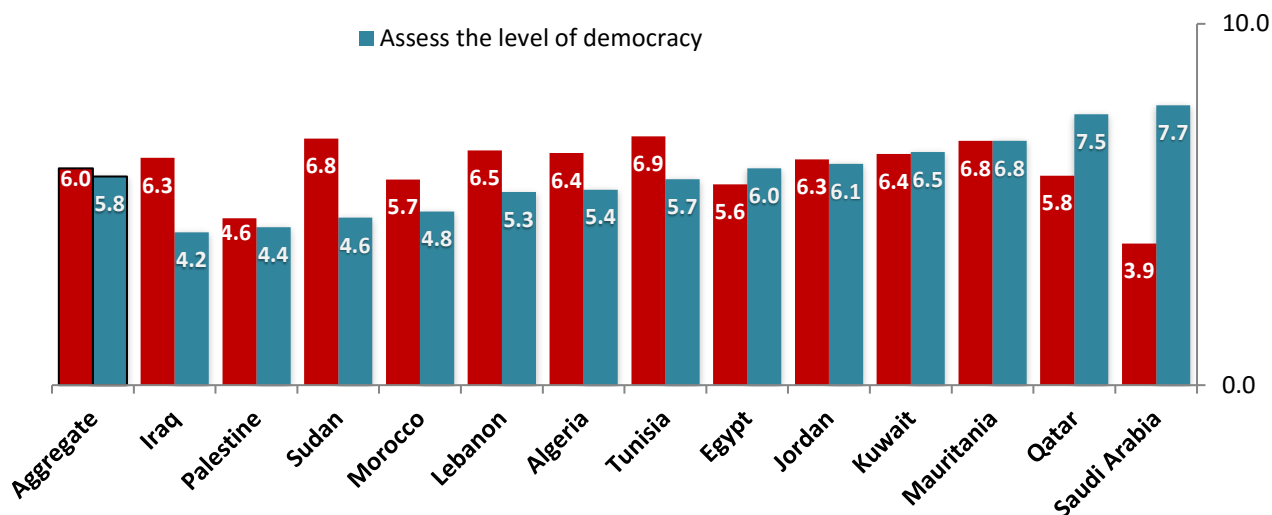
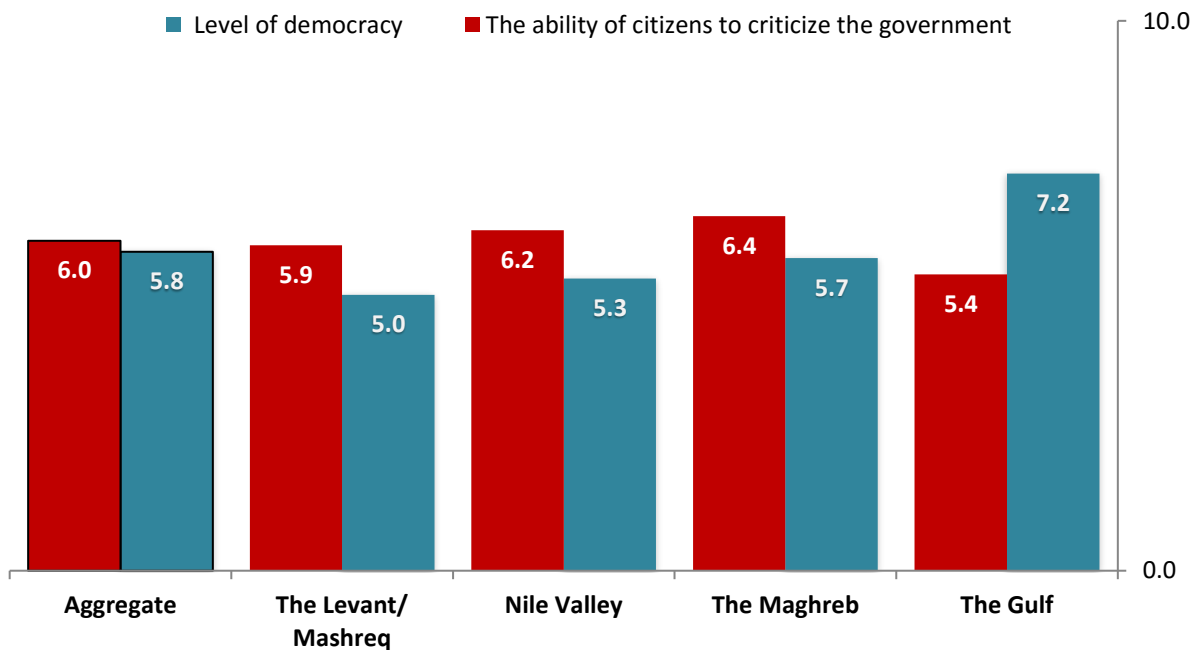


Figure 35: Evaluating the level of democracy in the countries surveyed and the ability of citizens to criticize the government according to Arab world regions



Arab Revolutions

How does public opinion gauge the 2011 Arab uprisings?

- In the context of identifying public attitudes toward democracy, we also gauge public opinion on the Arab uprisings of 2011, for which the main demand was to end autocratic regimes. Thus, to assess the views of citizens on the revolutions at the moment of their happening, without asking about subsequent developments, we asked: “Back in 2011, several Arab countries witnessed revolutions and popular protests, in which people took to the streets in demonstrations. What is your assessment of that?”
- Results show that 58% still consider the uprisings to have been positive, and 28% consider them to have been negative.
- This percentage that was recorded in the 2019-2020 AOI is the highest percentage recorded since 2013.

Views of the Arab Spring over time.

Figure 36: Back in 2011, several Arab countries witnessed popular revolutions and protests in which people took to the streets in peaceful demonstrations and protests; what is your assessment of that? Based on AOI surveys over the years:

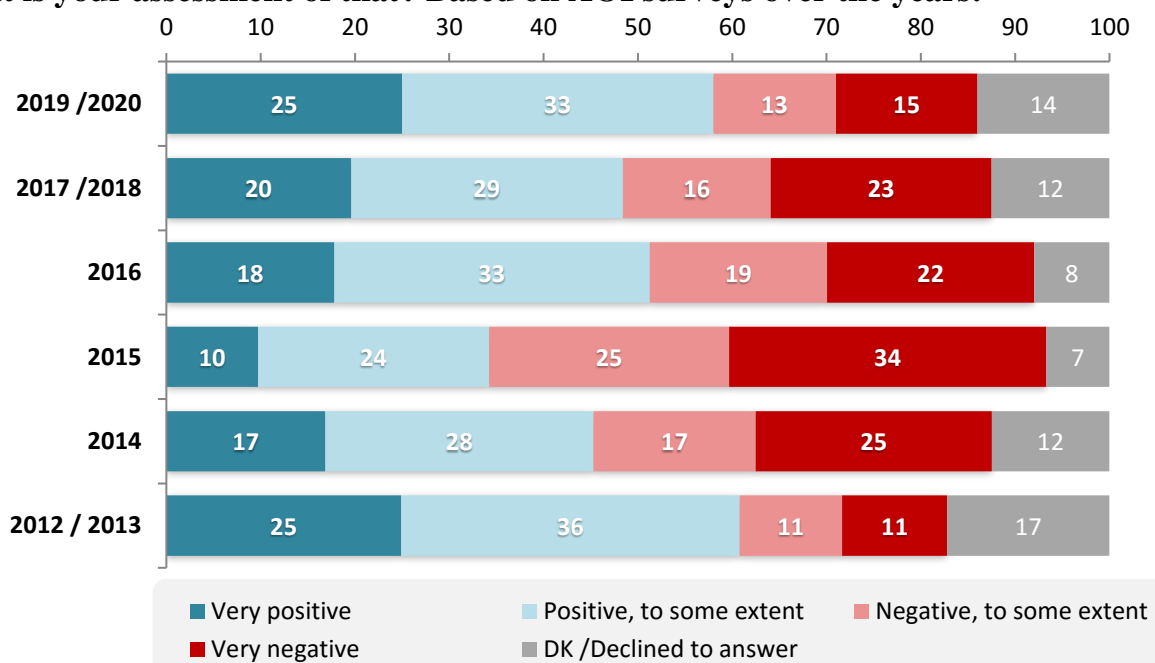
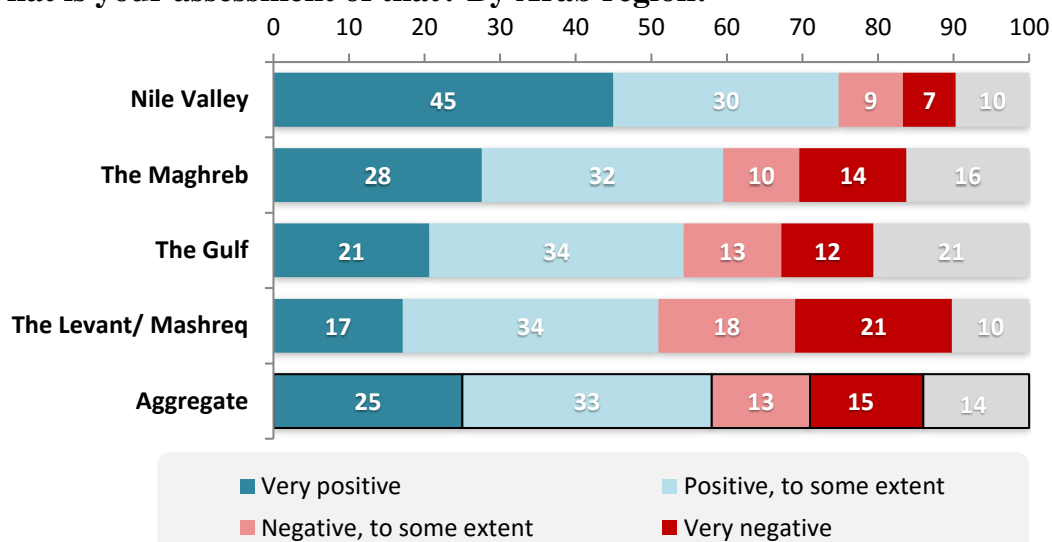


Figure 37: Back in 2011, several Arab countries witnessed popular revolutions and protests in which people took to the streets in peaceful demonstrations and protests; what is your assessment of that? By Arab region:



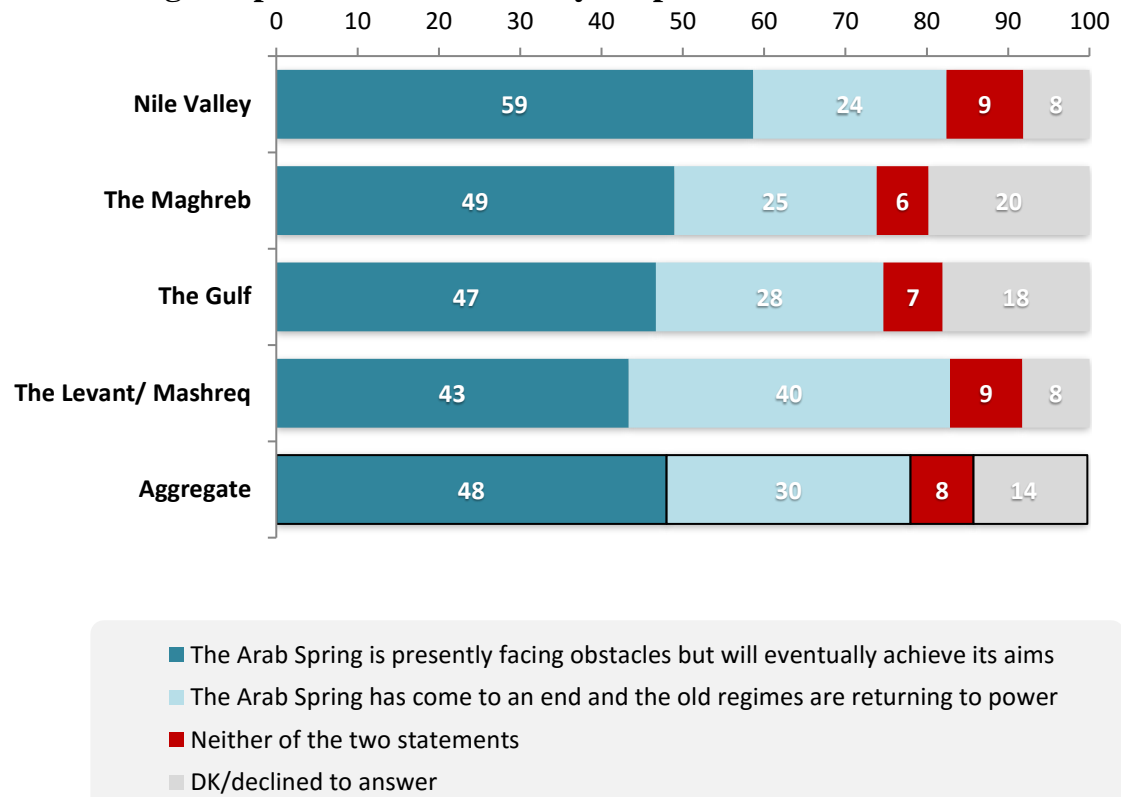
Aside from their evaluation of the revolutions and their outcomes, respondents were asked about the reasons that prompted people in 2011 to participate in the Arab revolutions and protest movements, and they stated that their motives were to stand against tyranny and injustice, for democracy and equality (29%), and against corruption (30%).

Figure 38: Back in 2011, several Arab countries witnessed popular revolutions and protests in which people took to the streets in peaceful demonstrations. In your opinion, what are the first and second most important reasons for that? As seen in the AOI over the waves of the survey

Order of responses	First most important reason			Second most important reason		
	2020/ 2019	2018/ 2017	2016	2020/ 2019	2018/ 2017	2016
Against corruption	31	21	25	14	11	6
Due to poor economic conditions	16	20	18	17	17	14
Against dictatorship	16	14	20	11	9	9
For political freedoms	6	8	10	7	8	7
To end oppression	6	8	5	12	14	15
For justice and equality	4	5	3	10	12	11
For democracy	3	4	4	8	8	9
For dignity	4	4	4	8	9	9
Other	1	3	3	1	1	1
don't know, decline to respond	13	13	7	0	0	0
No other choice	0	0	0	12	13	19
Total	100	100	100	100	100	100

- Arab public opinion was divided between optimistic and pessimistic about the reality and future of the Arab Spring revolutions, with 48% said that they are in a faltering phase, but that they will eventually achieve their goals, and 30% who believe that the Arab Spring has ended and that previous regimes have returned to power.

Figure 39: Which of the following two phrases are closest to your point of view?
Which of the following two phrases are closest to your point of view?



- Public opinion in the Arab region trends in support of the Sudanese and Algerian revolutions, although nonresponse represents a third of the sample.

Figure 40: For several months, Algeria has been witnessing popular protests that led to changes in the political system. Did you support or oppose these popular protests in Algeria?

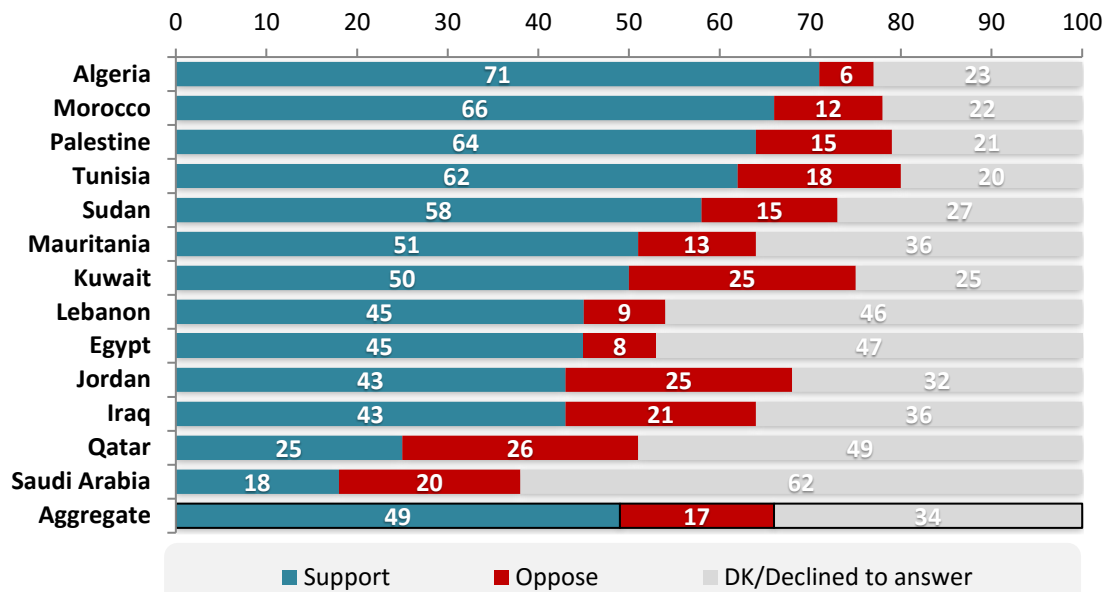


Figure 41: For several months, Algeria has been witnessing popular protests that led to changes in the political system. Did you support or oppose these popular protests in Algeria? By Arab world region:

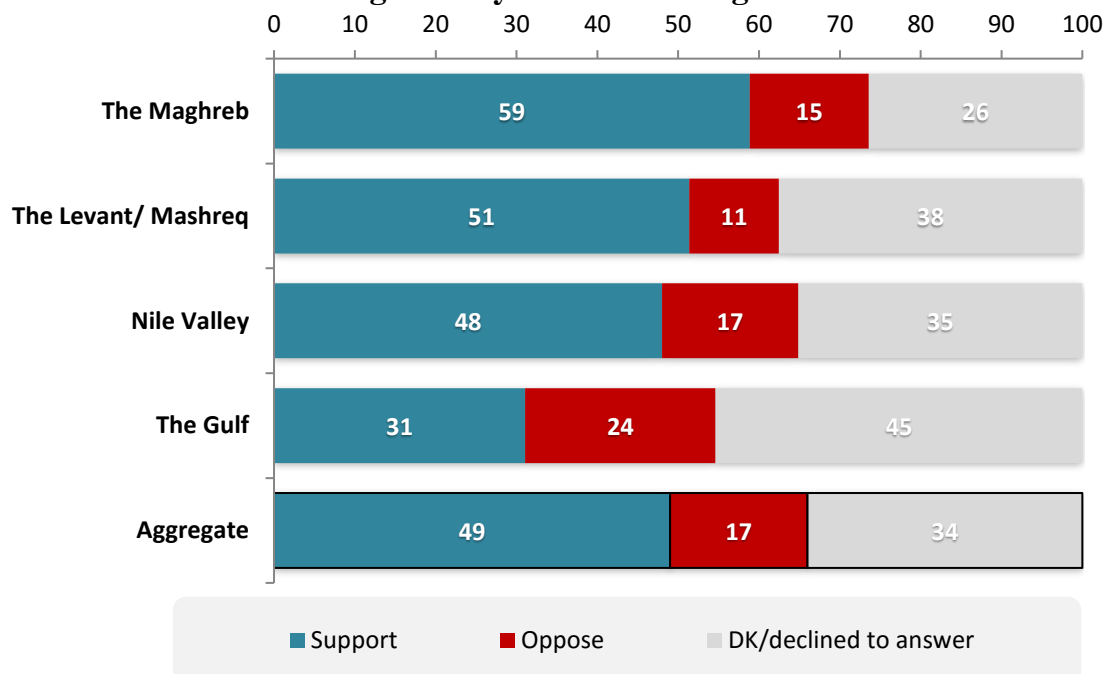


Figure 42: Over the course of several months, Sudan witnessed popular protests that led to changes in the political system. Did you support or oppose the popular protests in Sudan?

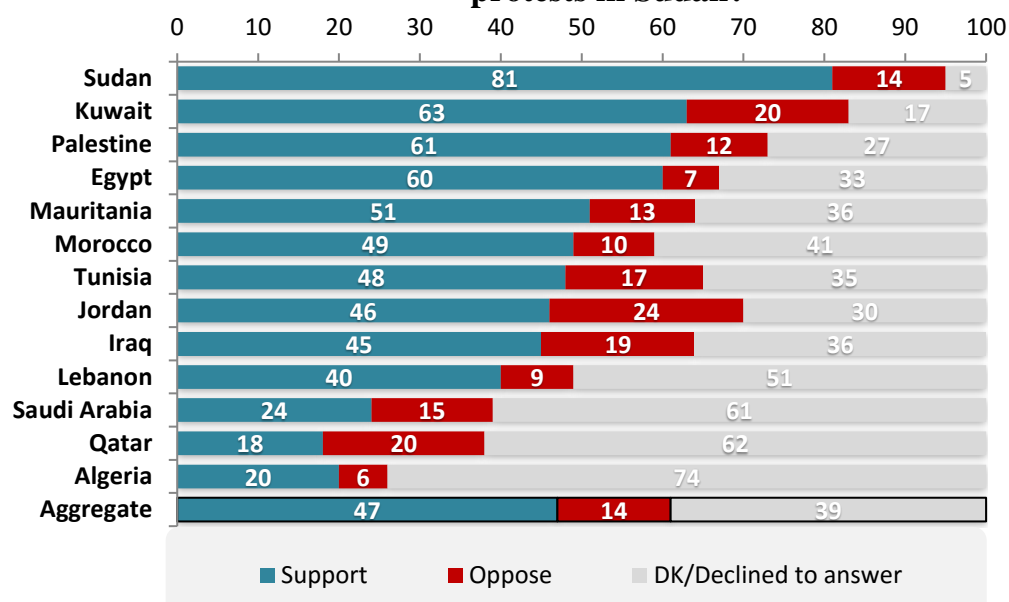
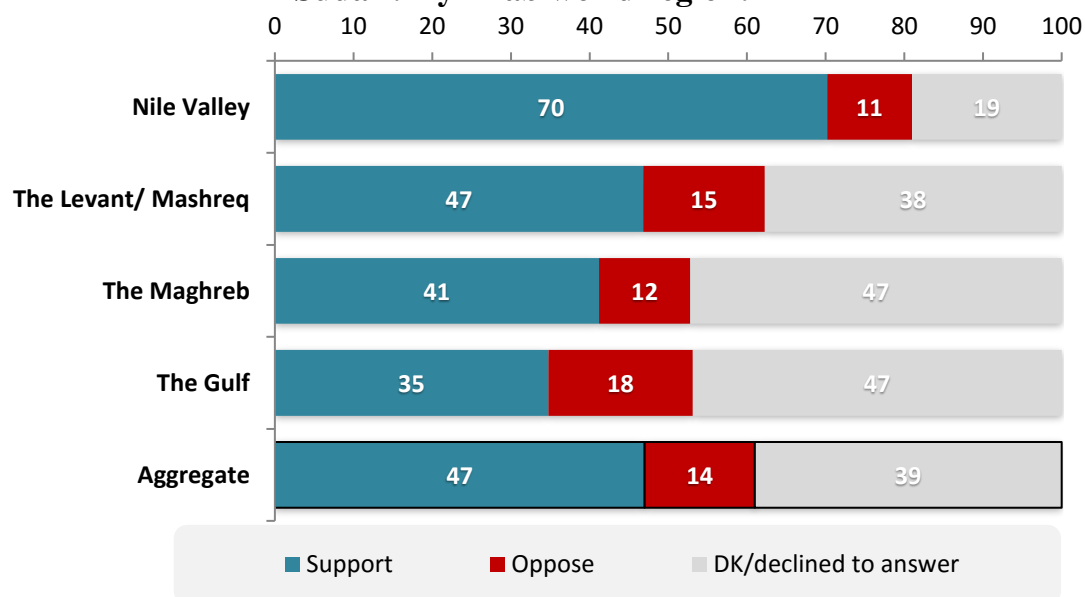


Figure 43: For several months, Sudan has been witnessing popular protests that led to changes in the political system. Did you support or oppose these popular protests in Sudan? By Arab world region:



The majority of the respondents whose countries witnessed popular protests supported these protests.

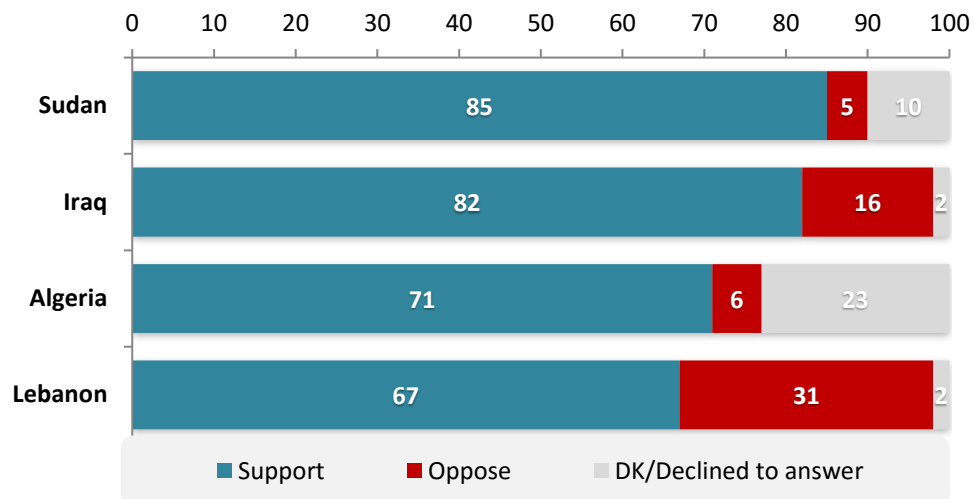
85% of the Sudanese supported the popular protests in Sudan.

82% of Iraqis support the popular protests in Iraq.

71% of Algerians support the popular protests in Algeria.

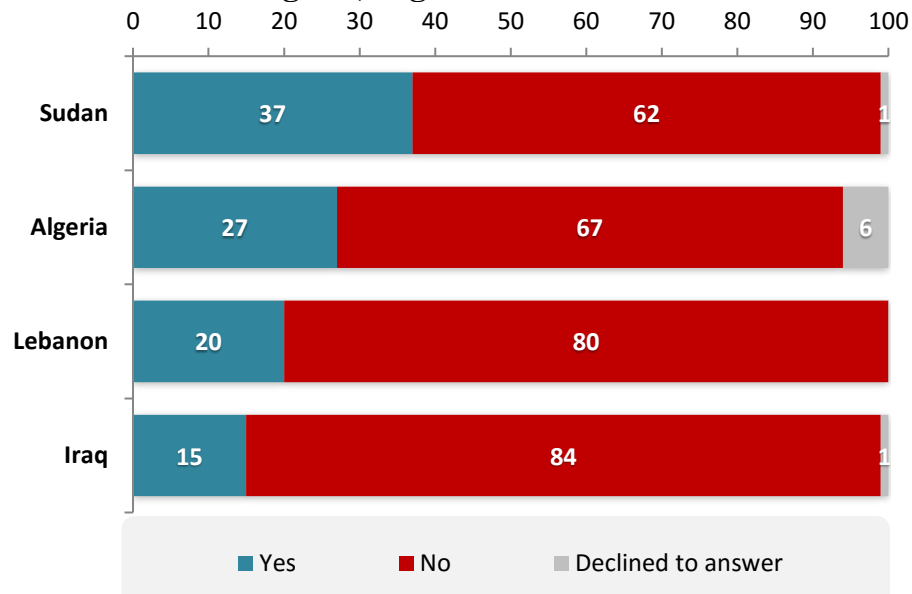
67% of the Lebanese people support the protests in Lebanon.

Figure 44: Supporters and opponents of the protests in Lebanon, Iraq, Algeria, and Sudan



- Participation rates in the popular demonstrations / protests ranged from 15% to 37% in Algeria, Lebanon, Iraq, and Sudan.

Figure 45: Respondents reporting participation in protests in Lebanon, Iraq, Algeria, Algeria and Sudan



Section 4: Civic and Political Participation

- Despite the fact that citizens in the Arab world support democracy, their political and civic participation is limited. To assess this issue, we tracked three indicators of political participation: political apathy, trust in existing political parties, and whether or not a respondent plans on participating in upcoming elections.
- Public opinion was split regarding participation in elections. The percentage of those who said they do not want to engage in elections has risen to 46%, although this figure hovered around 27% in the surveys from 2011 to 2013.
- Trust in political parties has also decreased over the years.
- Although Arab public opinion supports democracy and gauges the level of democracy in their countries negatively, political apathy has become increasingly the norm. This is perhaps to be expected if we are to consider that the common citizen does not have space to criticize the government. Saudi Arabia is a prime example of this dynamic.

Figure 46: Level of political apathy, by year

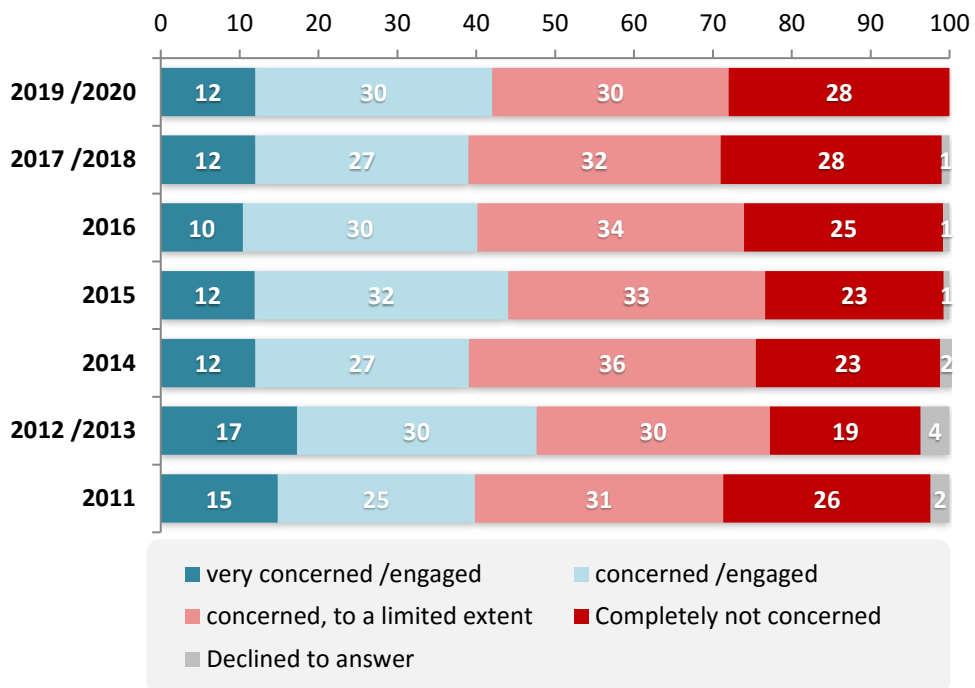


Figure 47: Level of political apathy, by region

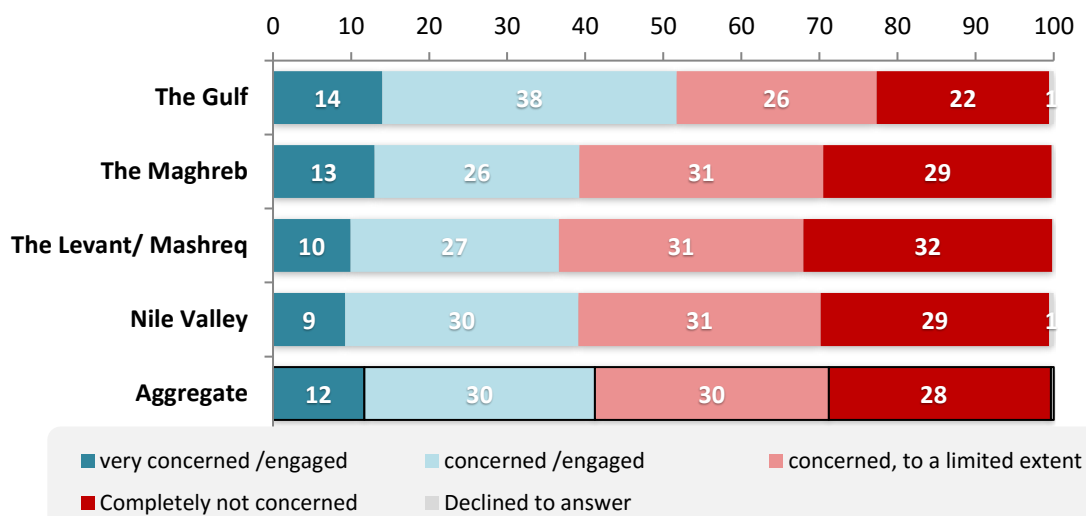


Figure 48: Do you intend to vote in the coming parliamentary elections?

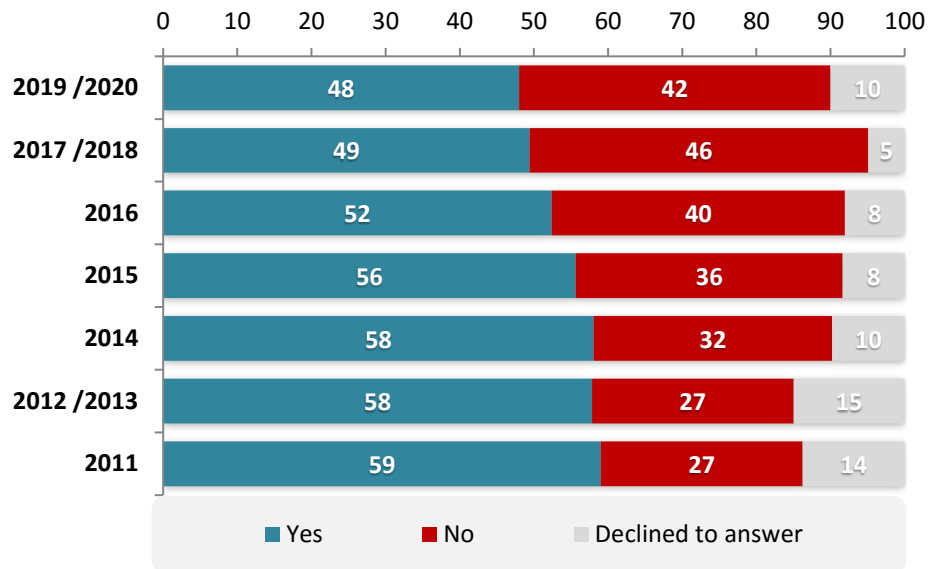


Figure 49: Levels of trust in political parties over time.

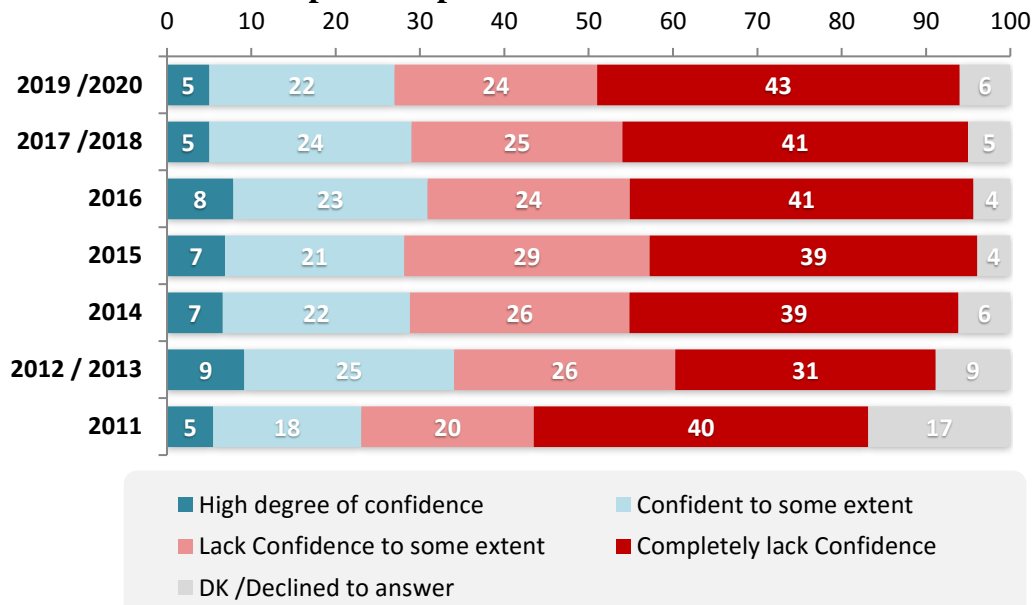
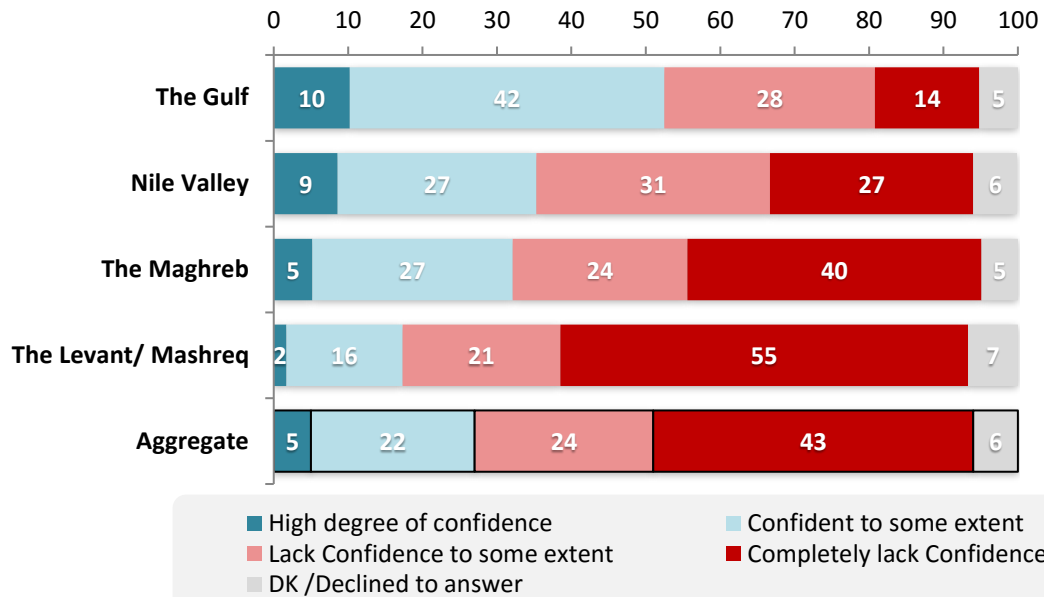
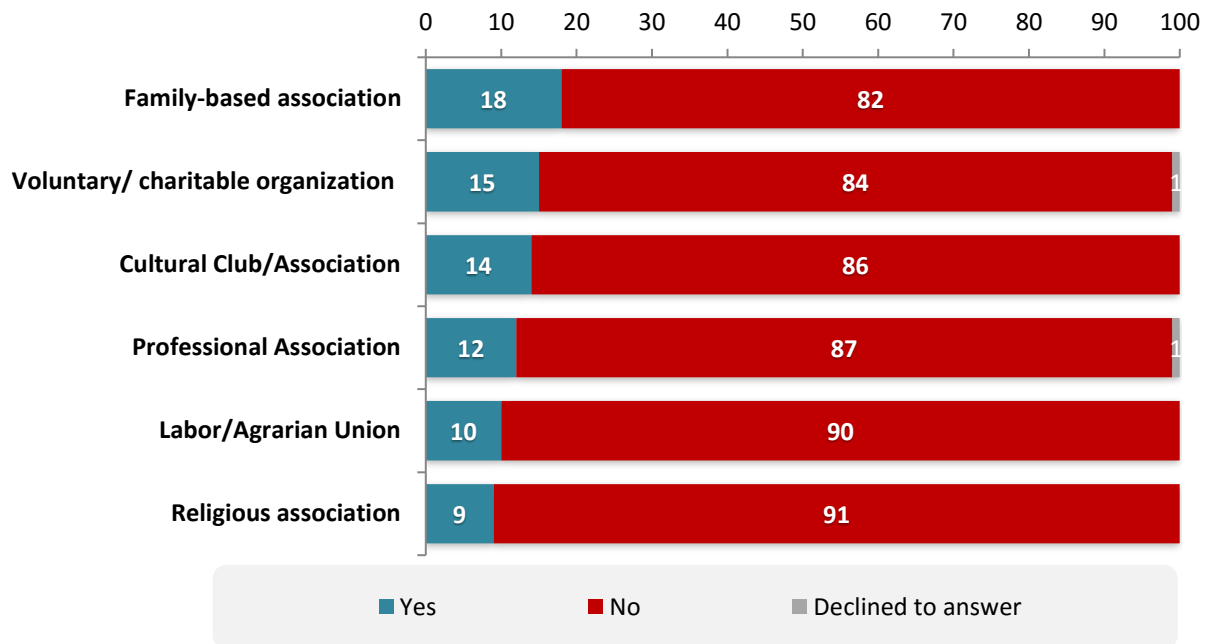


Figure50 : Levels of trust in political parties by region.



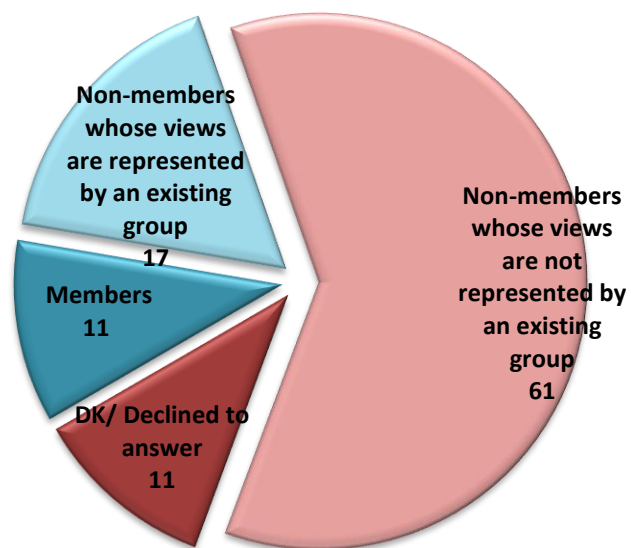
- Membership of, and participation in, civil and voluntary organizations remains extremely limited across the Arab region, with no more than 16% of respondents reporting that they are members of such groups in any given country. When taking into account the level of active participation in the activities of such groups, the level of effective participation would likely fall further still.

Figure 51: Types of political participation



- Additionally, a majority of respondents (61%) have no affiliation with a political party in any way, nor do they feel that their views are represented by any existing political group or bloc.

Figure 52: Representativeness of Political Parties



- Opinion is split in terms of the interest of respondents in political affairs in their countries, though the proportion of interest is nearly constant over the past nine years.
- When it comes to following political news, we find that countries which have high rates of political apathy and no room for criticism are the ones that follow political news the least (i.e. Saudi Arabia and Egypt). Alternatively, in countries with more open political systems, people are more concerned with following political news.
- Fundamental changes have appeared over the past nine years in the sources for political news, with an increase in use of the internet over television.
- Most citizens (48%) still rely on television channels for political news coverage, followed by internet (35%) and radio (4%). Since many sources on the internet are news channel and newspaper sites, the change here is more in the means of accessing news than in the type of broadcasting or publishing institution.
- 35% of respondents stated they rely on the internet for political news, the highest proportion since 2011, doubling seven times over this period, with reliance on television channels decreasing.
- While 73% of respondents reported using the internet, to varying extents, only 27% indicated that they never use the internet. The results from the 2019-2020 poll show a continuing, statistically significant increase in internet penetration in the Arab region. The vast majority (85%) of Arabs who use the internet also have accounts on Facebook.
- 55% of Arabs who use the internet also have accounts on Instagram, 44% have accounts on Snapchat, while 45% have accounts on Twitter. The relative popularity of various social media can be seen in the chart below.
- Most of the respondents with social media accounts, in all regions of the Arab world, have accounts on Facebook; less than half of them have accounts on Twitter, apart from the Gulf region where 87% of respondents report having a Twitter account.
- The most used language while browsing the internet was predictably Arabic (87%) with French being the second most used.
- In light of the multiple uses of social media, its users were asked several questions to find out the extent of their use of it in: obtaining news and political information, expressing their opinions regarding political events, and interacting with political issues.
- In addition to other uses, the results showed that 80% of social media users also use it to obtain news and political information, and 20% use it more than once daily.
- 61% of social media account holders use it to express their views on political events, and 28% use it daily or multiple times a day.
- 61% of social media account holders use it to interact with political issues, 47% use it daily or multiple times a day.
- The society that least uses social media to interact with political issues was Saudi Arabia. This has been reflected in the Gulf region as a whole.

Figure 53: Comparison of news sources.

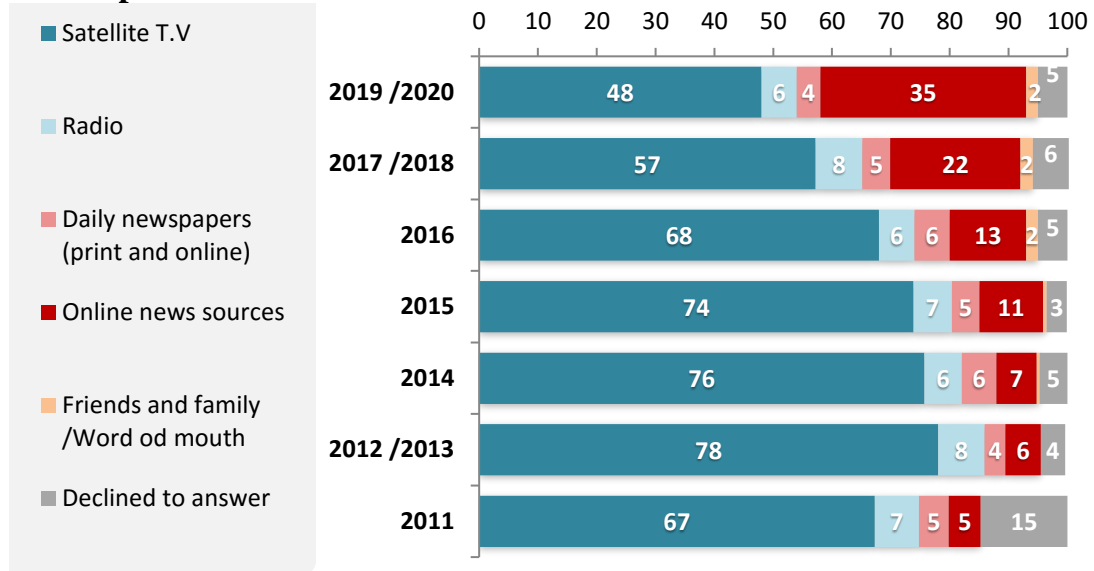


Figure54 : Frequency of internet use: internet penetration has increased considerably during the life of the Arab Opinion Index.

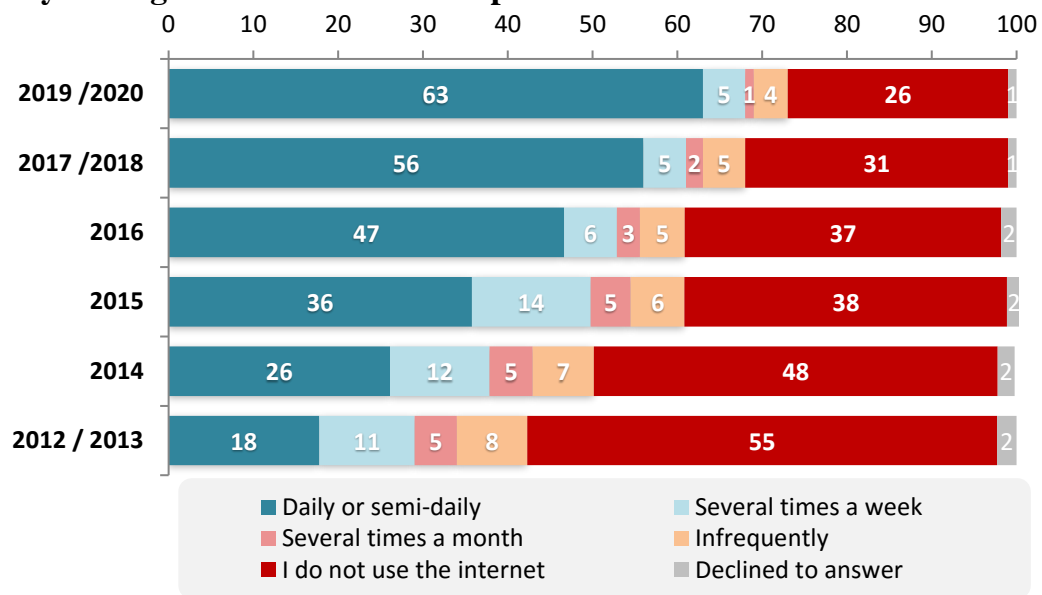


Figure 55: Frequency of internet use: internet penetration has increased considerably during the life of the Arab Opinion Index by region

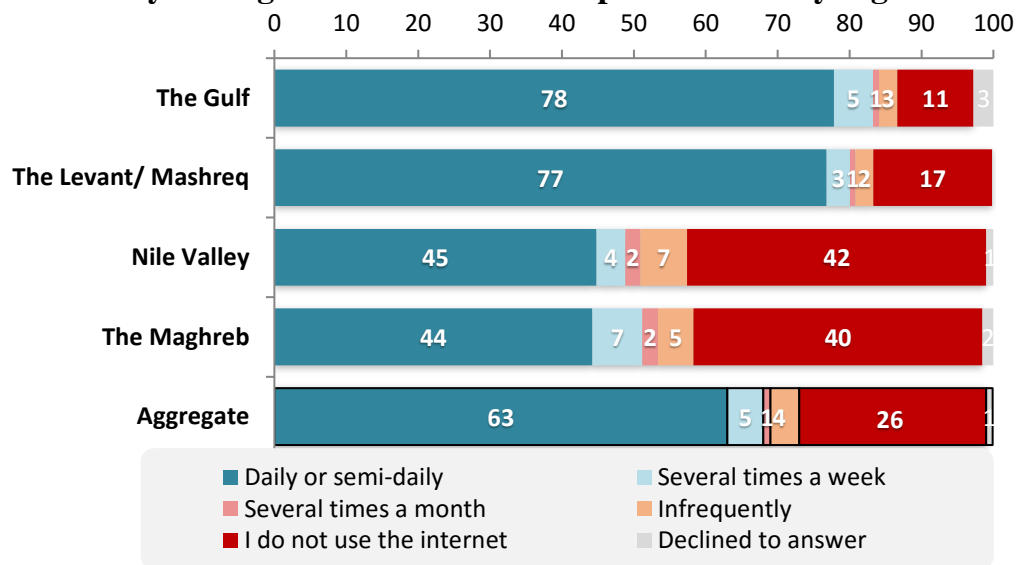


Figure 56: Social media users: frequency of various social media channels

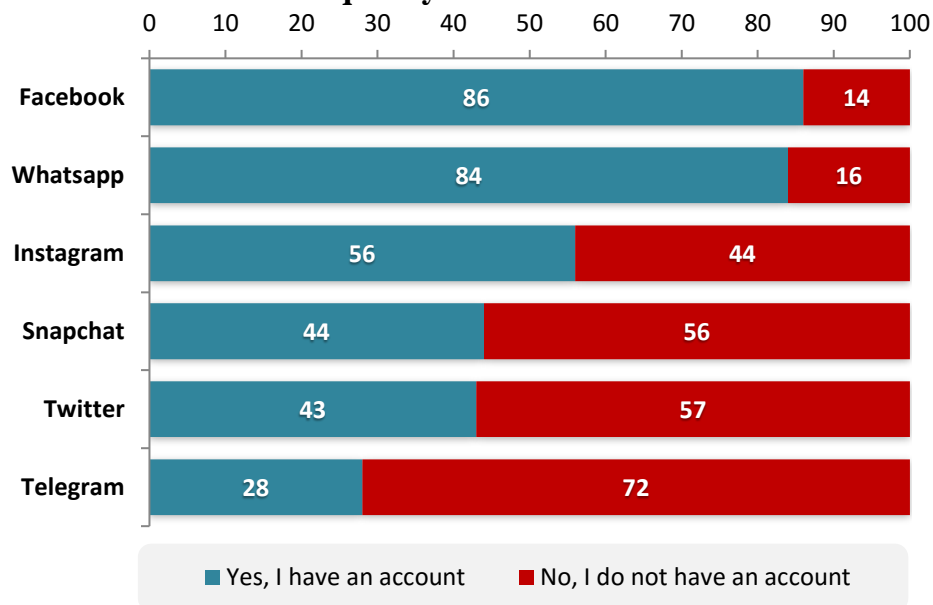


Figure 57: Social media users: frequency of various social media channels by region

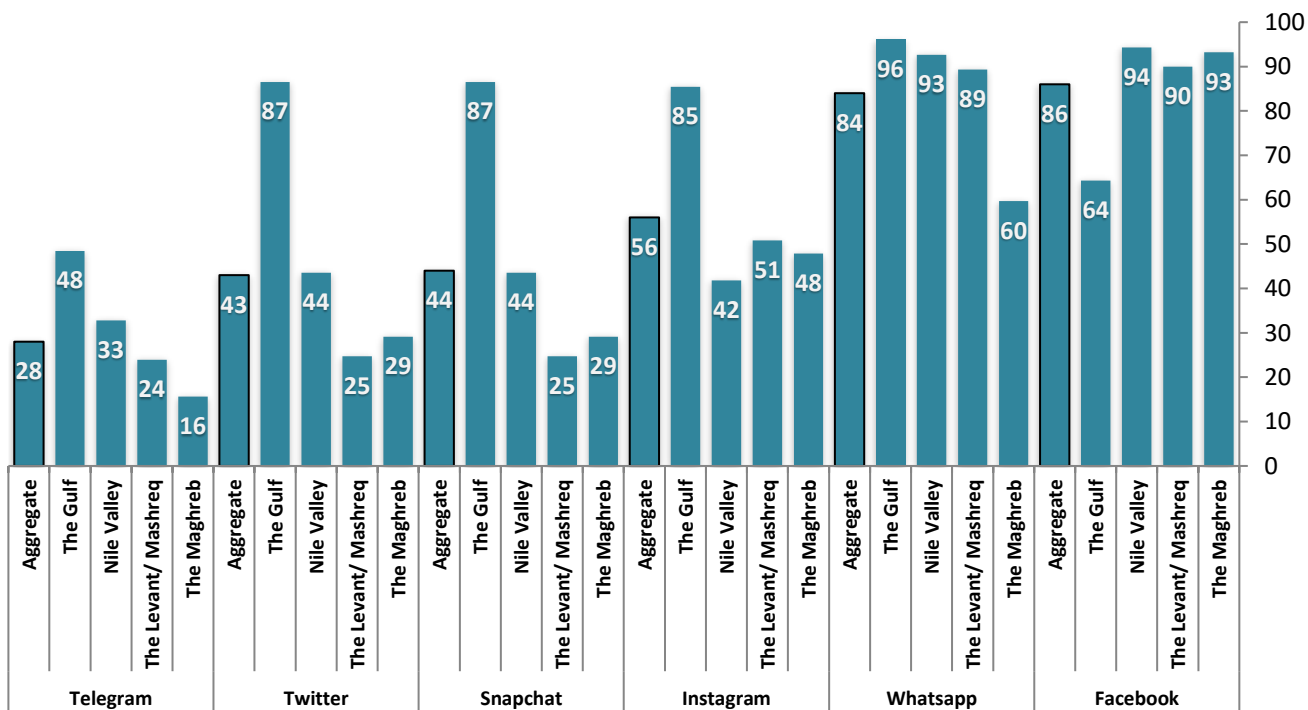


Figure 58: How often respondents use social media to engage with social issues

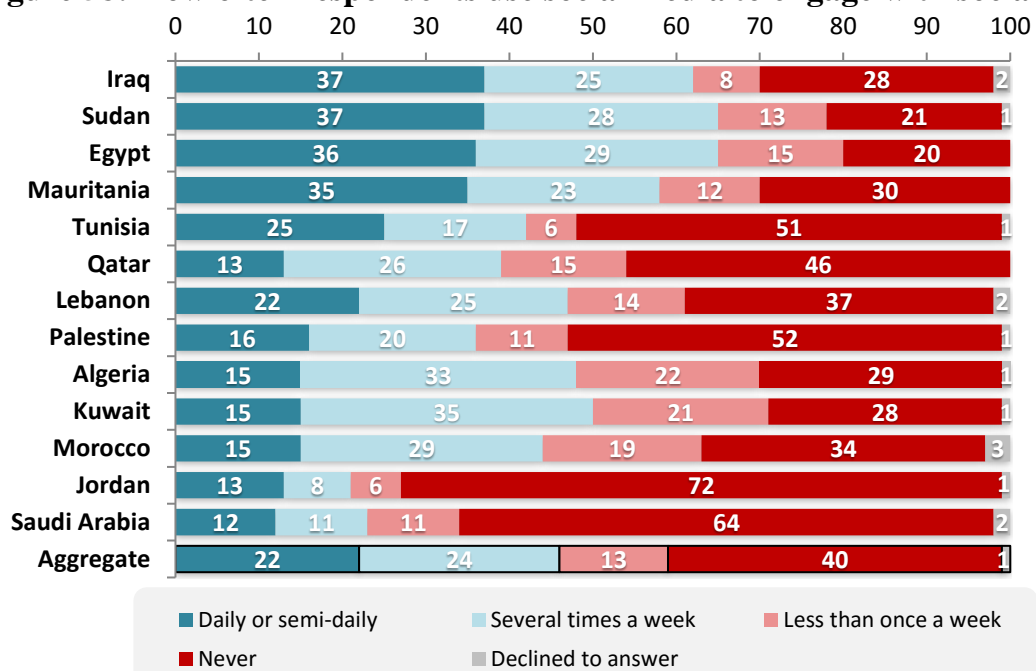


Figure 59: How often respondents use social media to engage with political issues

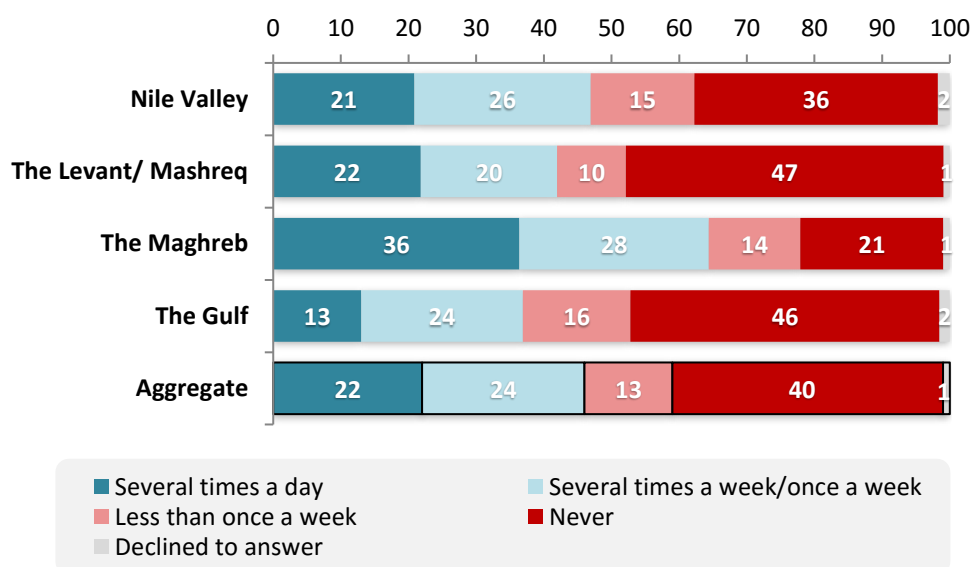


Figure60 : The languages most used in browsing the internet

	The most used language	The second most used language
Arabic	87	7
French	7	13
English	4	30
Kurdish	1	0
Other	0	1
Refused to answer	1	--
No second languages	--	49
Total	100	100

Section 5: Religion and Religiosity in Public Sphere and Political Life

- Based on self-reporting, most of the Arab public is “religious to some extent” (63%). This compares with 12% of the Arab public who define themselves as “not religious,” and 23% as “very religious.”

Figure 61: Self-identified religiosity, by year

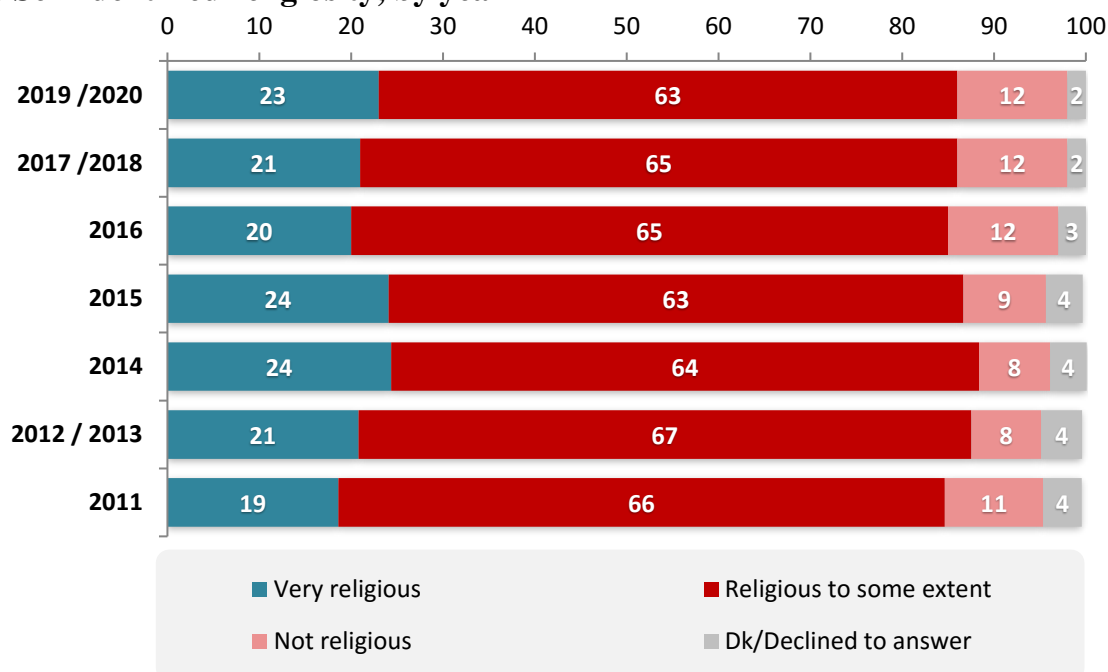
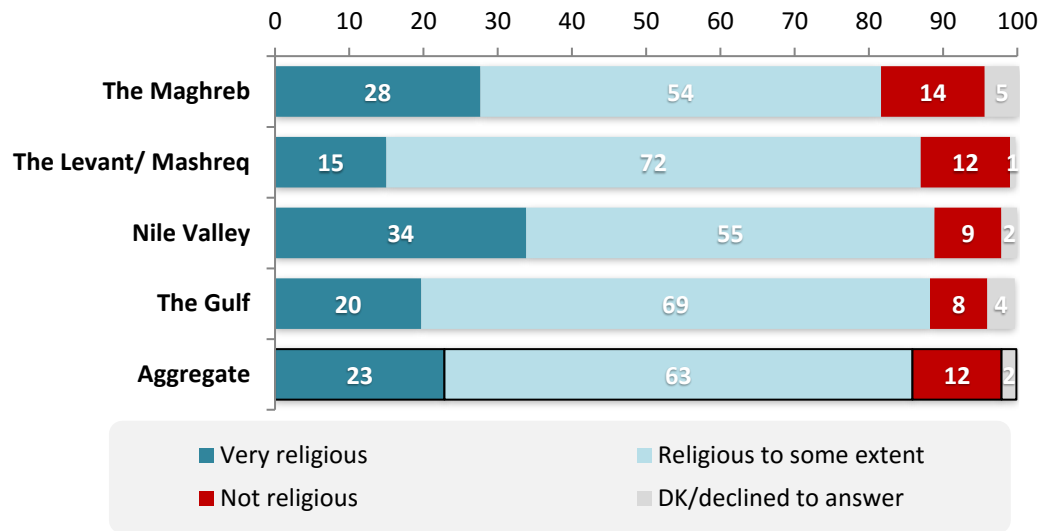


Figure 62: Self-identified religiosity, by region



- 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 (39%). This value has not changed significantly over the years of the index.

Figure 63: Most cited factors defining an individual as religious, by year

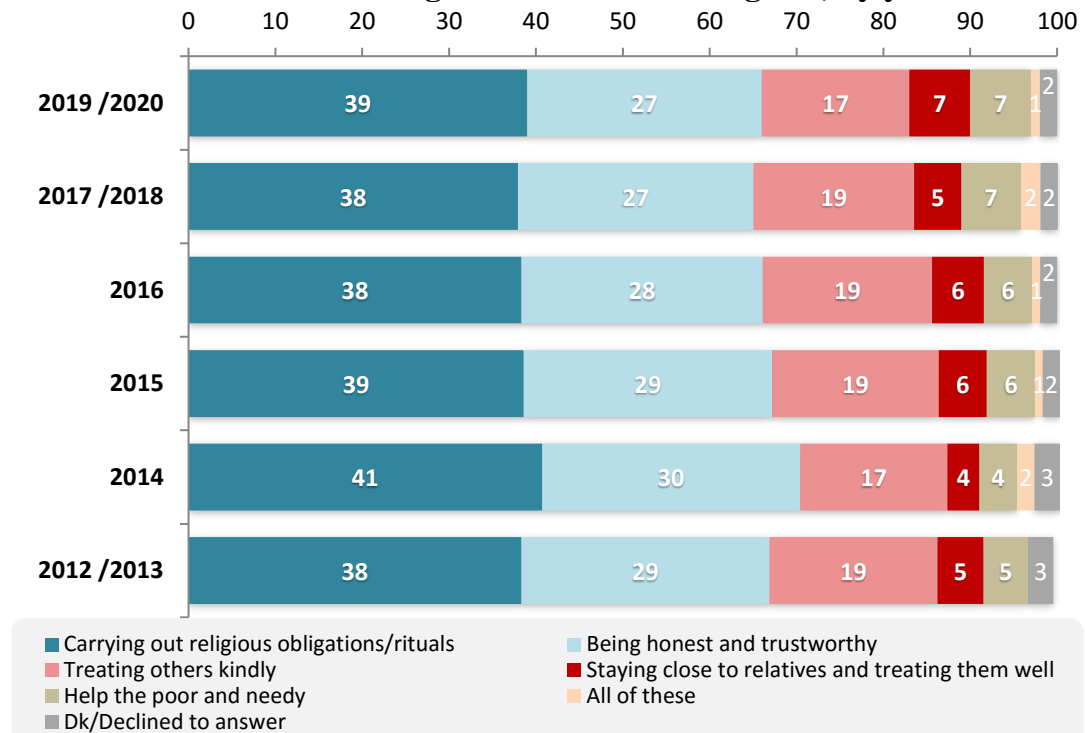
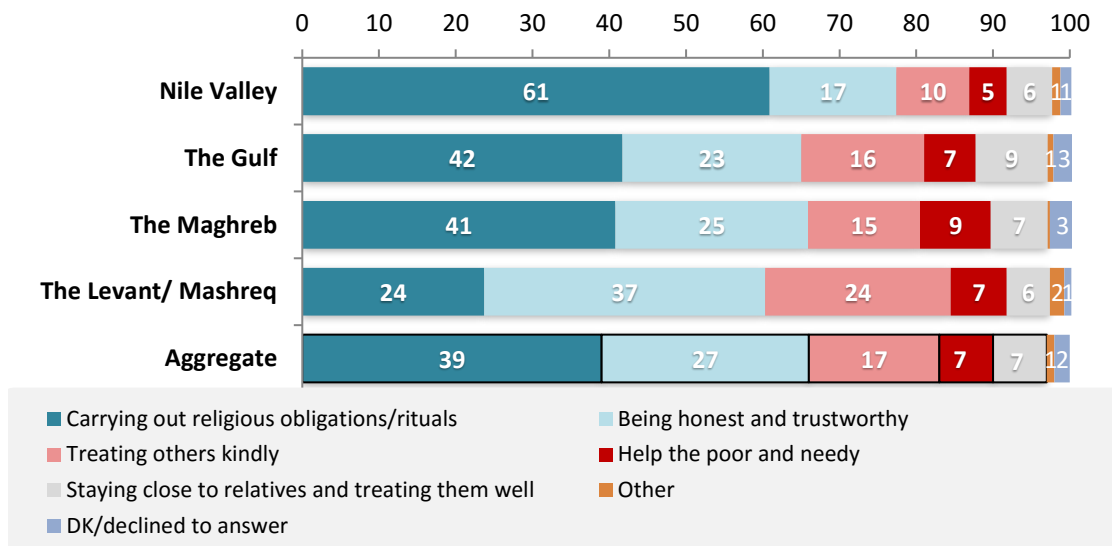


Figure 64: Most cited factors defining an individual as religious, by region



- While most Arabs describe themselves as somehow religious, most respondents nonetheless oppose edicts which pass negative judgement against members of other faiths, or which declare followers of differing interpretations of Islam to be apostates.
- Most respondents, while religious, refuse to accept that non-religious people are inherently bad people.
- Finally, most respondents do not discriminate on the basis of religiosity, or between religious and non-religious individuals, when conducting their social, political and economic/business interactions.
- The majority of respondents expressed that they do not deal with people on the basis of their religiosity or lack thereof, 61%, while 31% said that they prefer dealing with religious people.
- Most Arabs oppose the involvement of clerics in voter choice or in governmental policy. 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.
- Arab public opinion is split almost in half in attitudes towards the general principle of “separation of religion from state,” with a slightly greater inclination towards supporting the principle of separation of religion from political life (49%), compared to 44% of respondents who opposes this.

Figure 65: Perception of statement: "No religious authority is entitled to declare followers of other religions infidels," by year

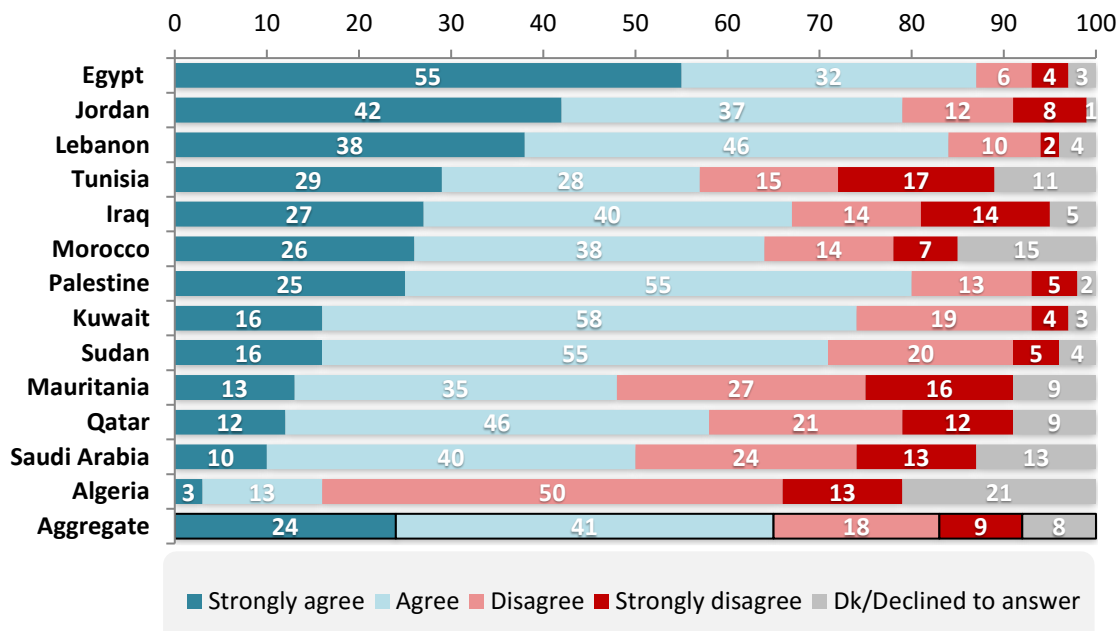


Figure 66: Perception of statement: "No religious authority is entitled to declare followers of other religions infidels," by year

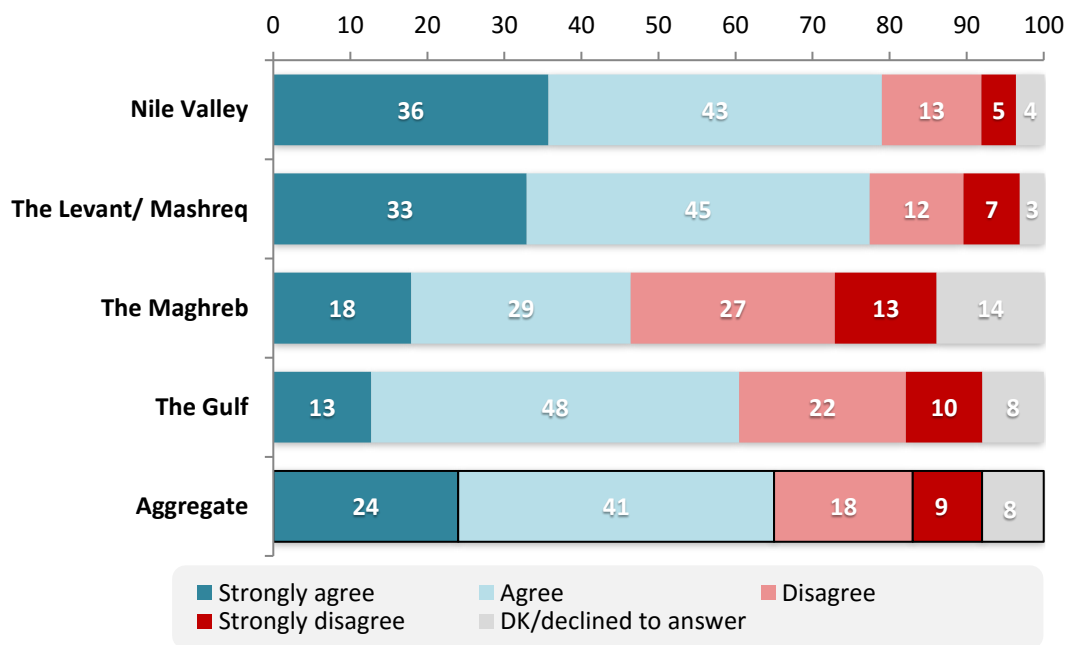


Figure 67: Perception of statement: "In your day-to-day life, do you prefer to deal with religious individuals?"

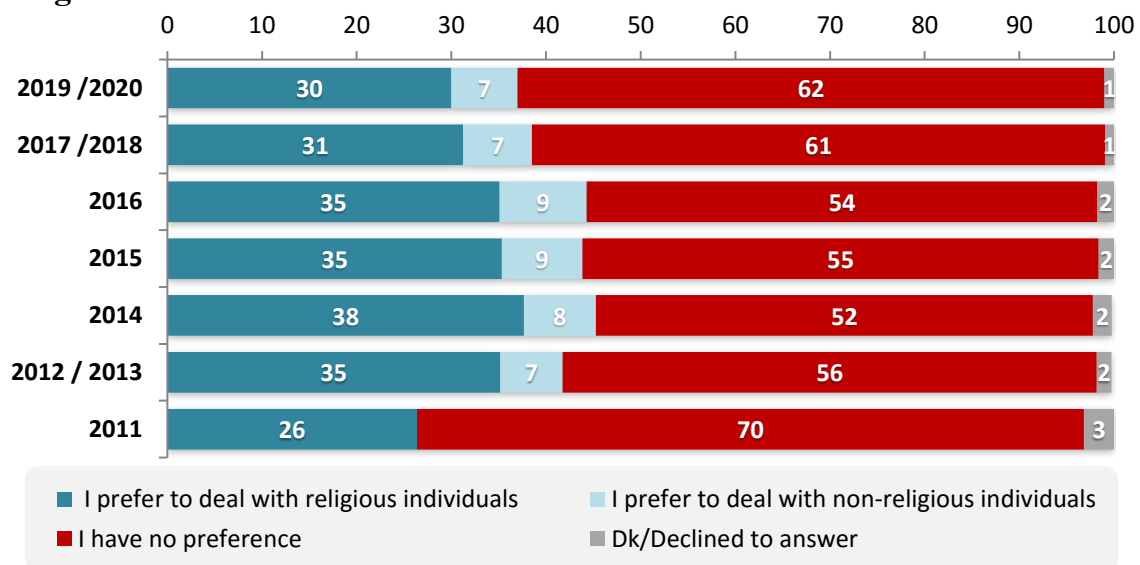


Figure 68: Perception of statement: "In your day-to-day life, do you prefer to deal with religious individuals?" by region

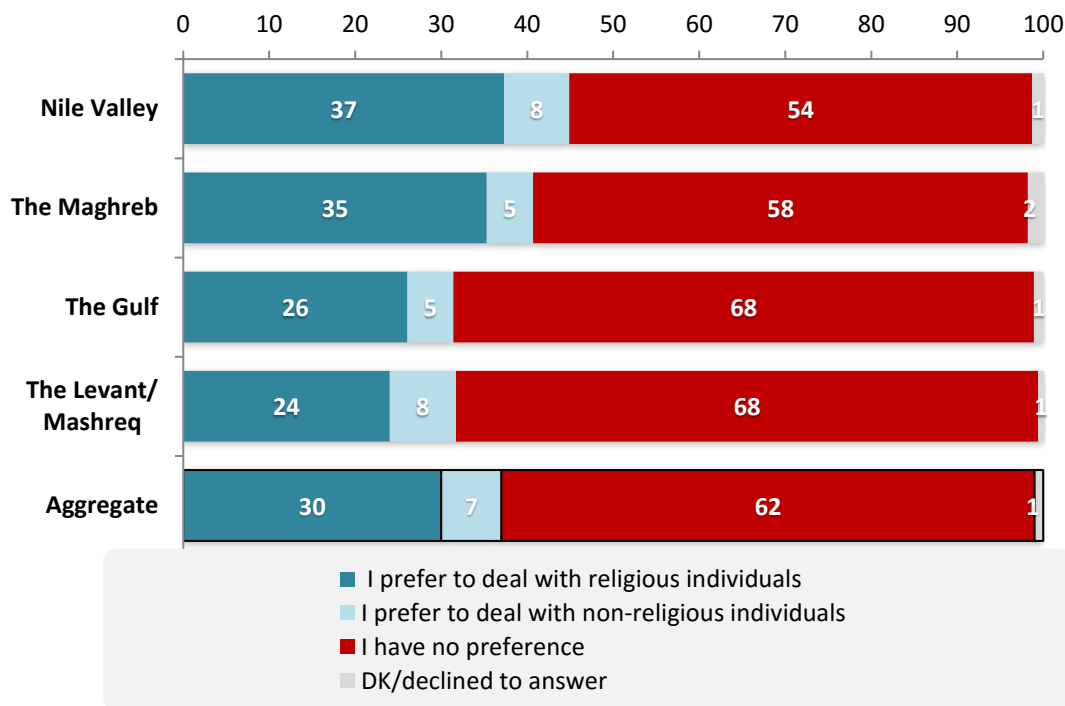


Figure69 : Perception of statement: "The government has no right to use religion to win support for its policies."

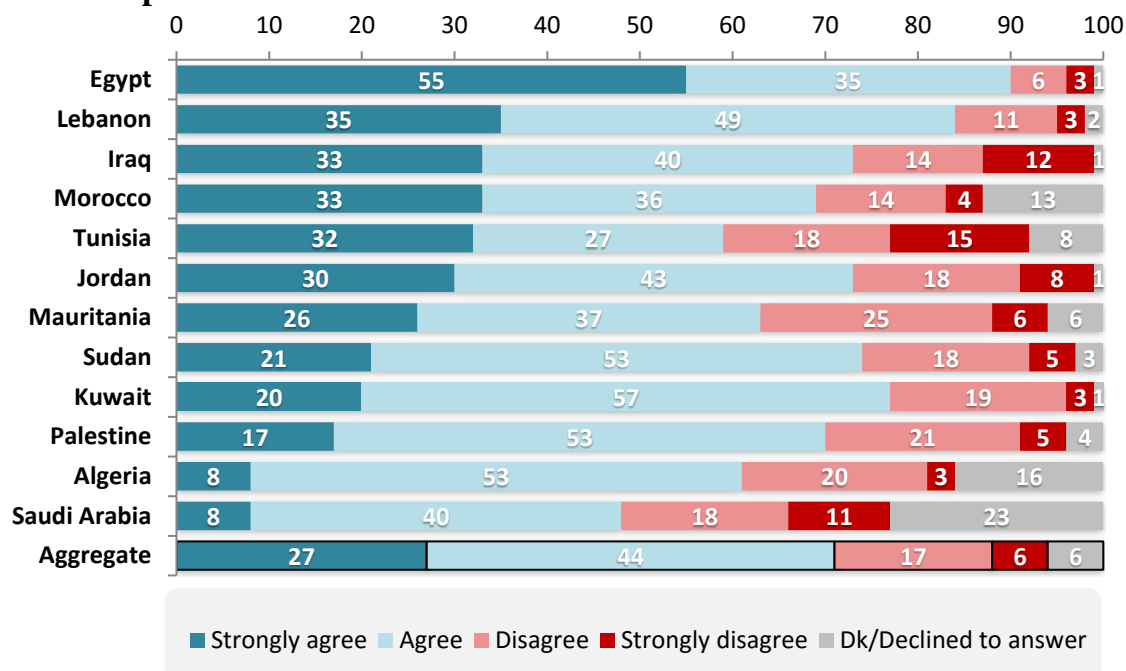


Figure70 : Perception of statement: “The government has no right to use religion to win support for its policies.” by region

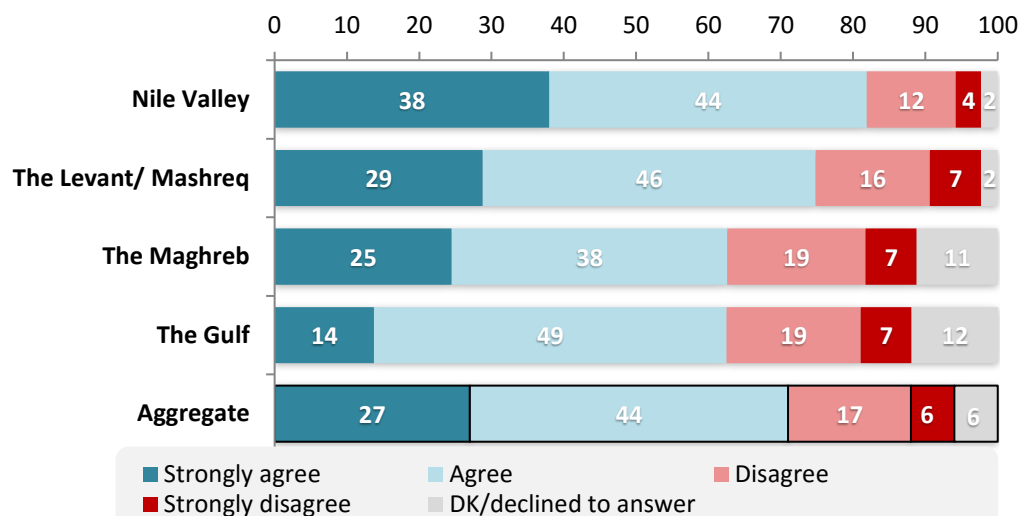


Figure 71 : Perception of statement: "It would be better for my home country if religion was separated from politics."

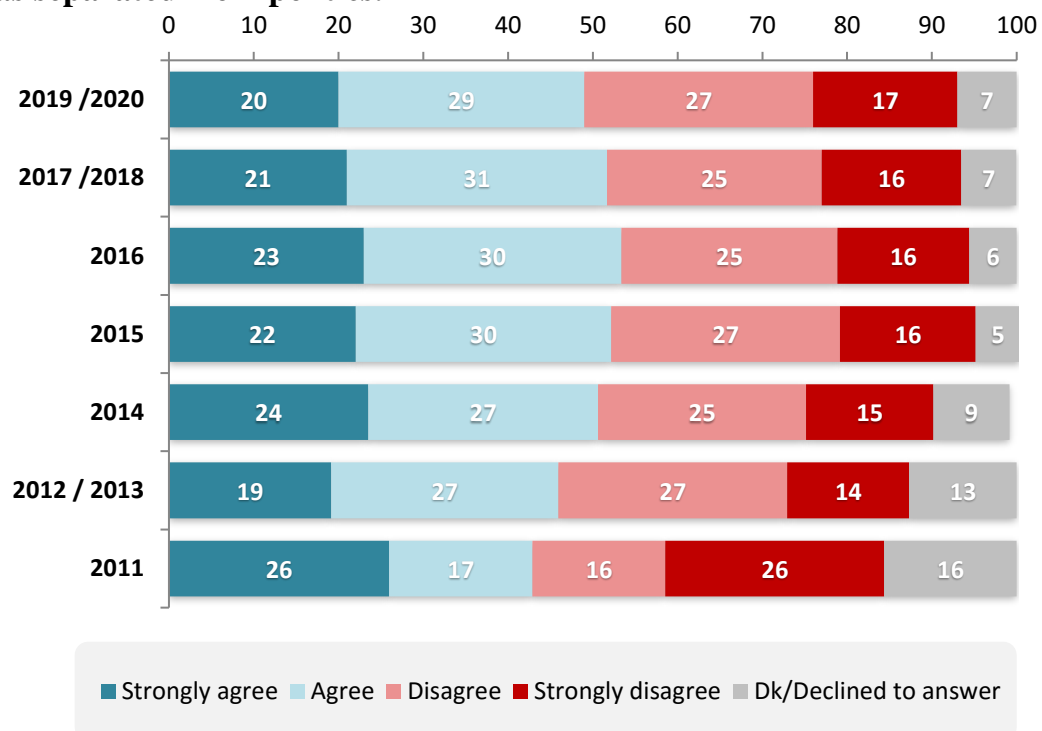
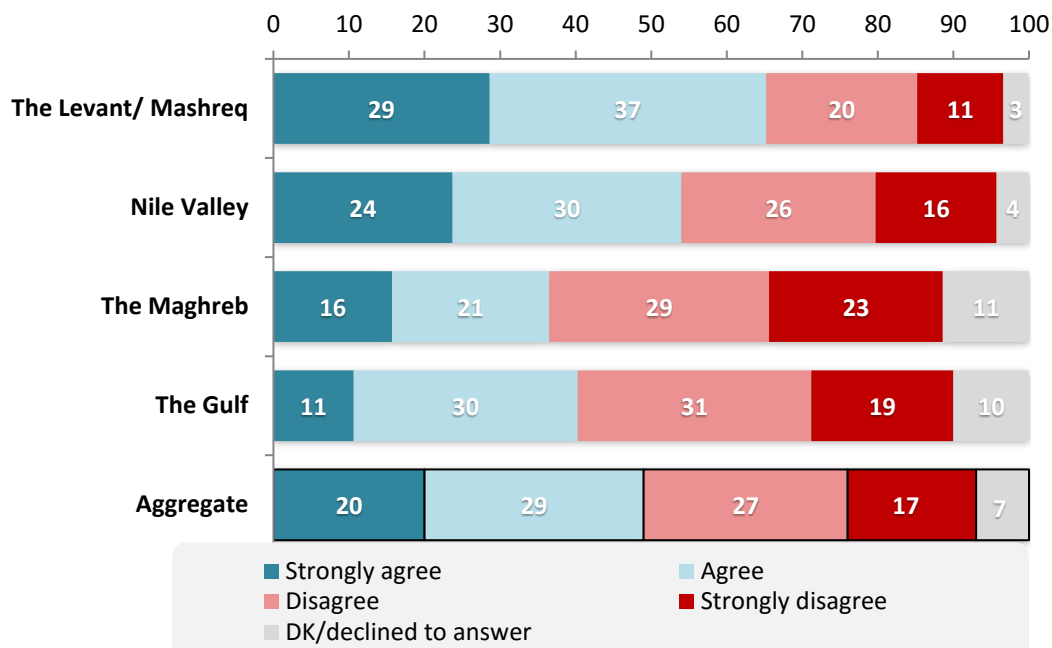


Figure 72 : Perception of statement: "It would be better for my home country if religion was separated from politics." by region



Section 6: Arab Public Opinion and Intra-Arab Relations

- A total of 81% of the respondents to the 2019-2020 Arab Opinion Index supported the sentiment that the various Arab peoples formed a single nation, in contrast to only 16% who agreed with the statement that “the Arab peoples are distinct nations, tied together by only tenuous bonds.”

Figure 73: Respondents generally agree that the various Arab peoples constitute a single nation.

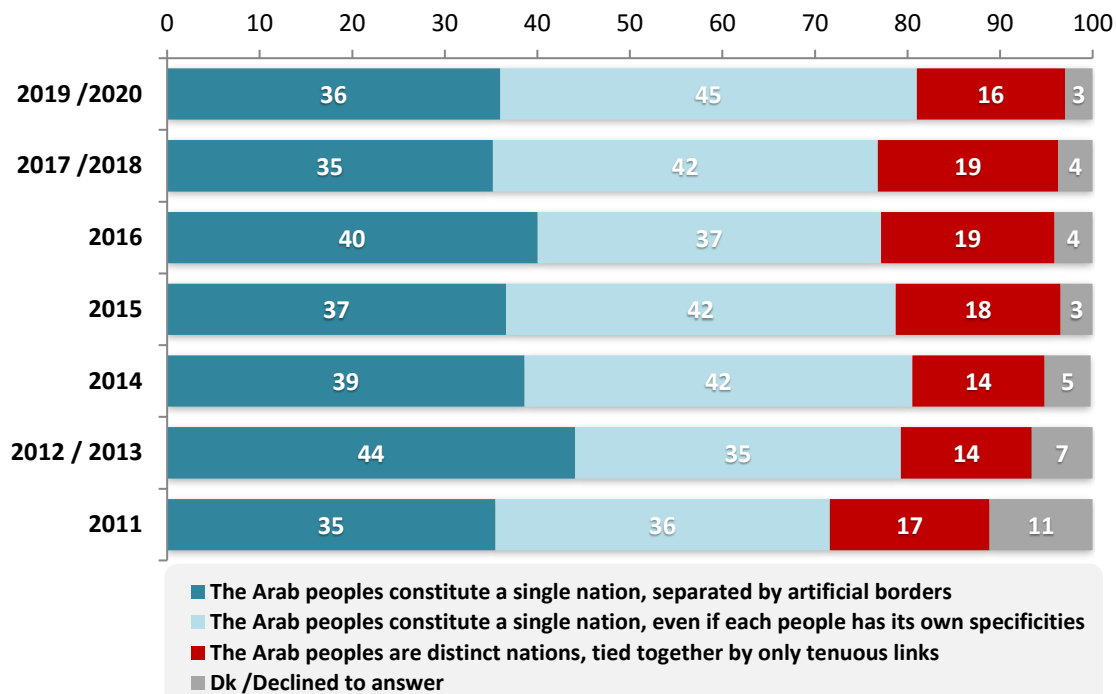
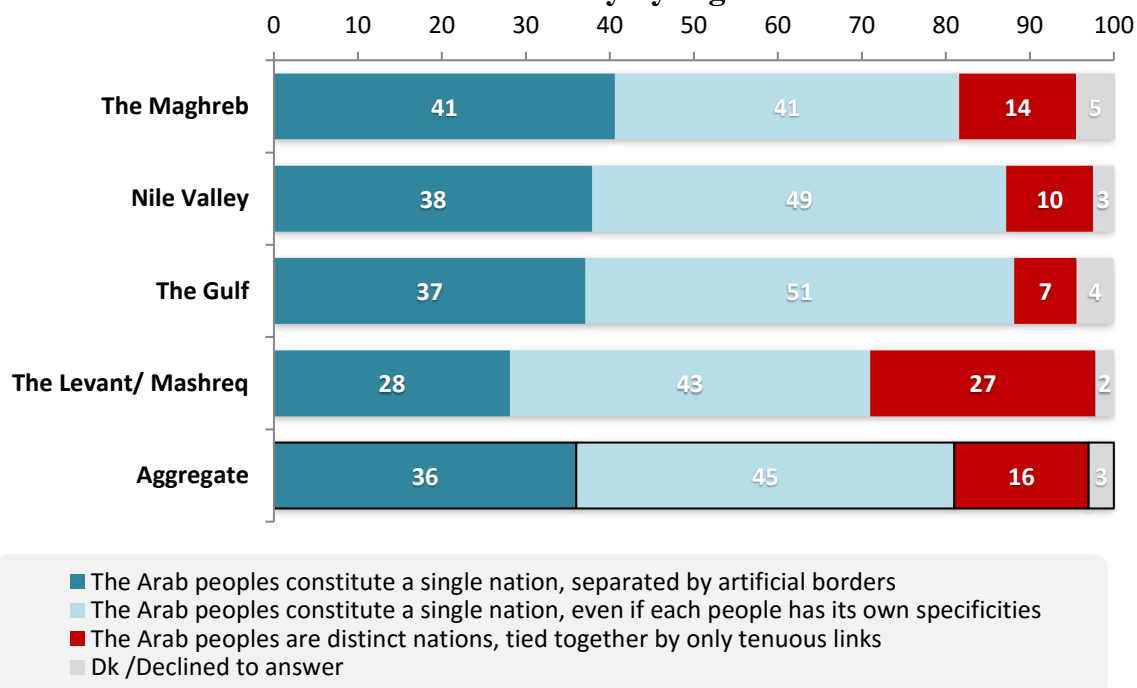
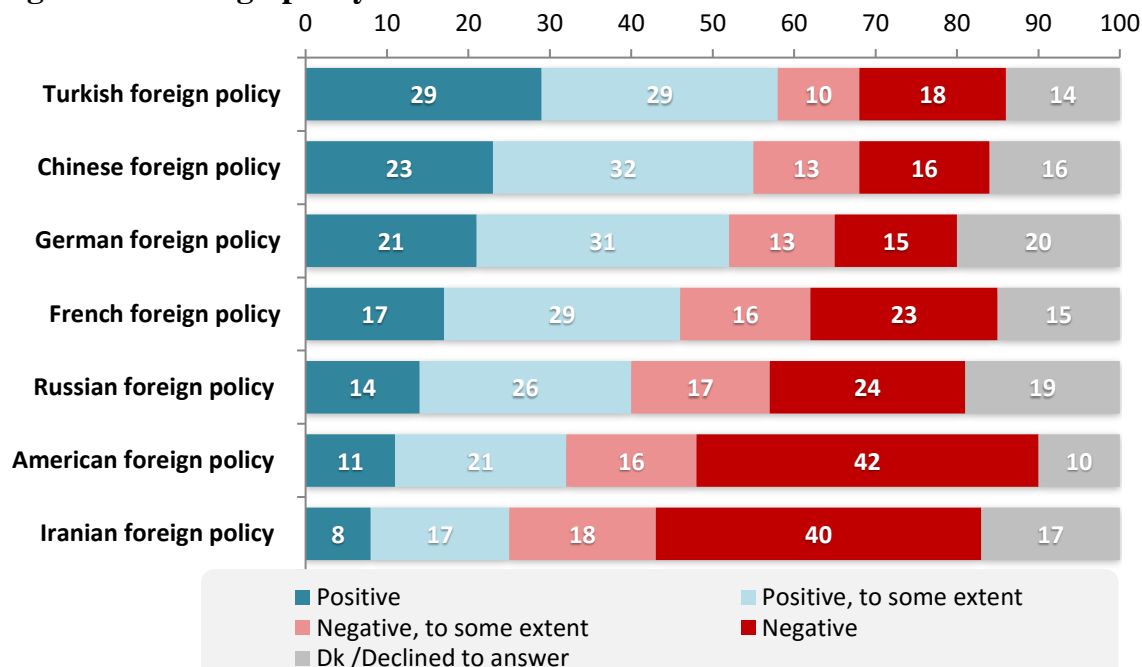


Figure 74: Assessments of Arab national unity by region



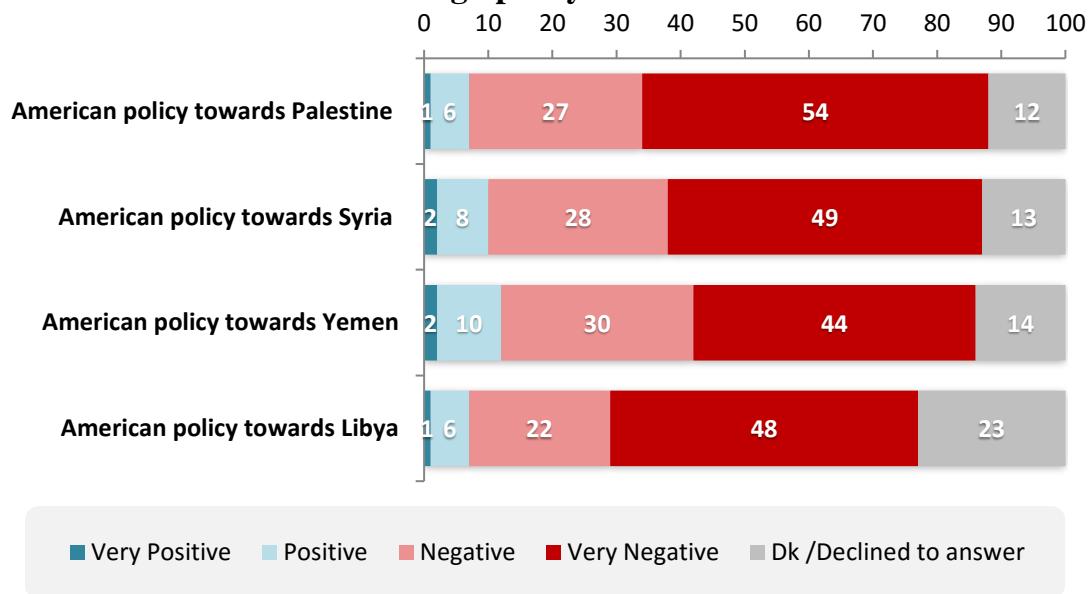
- Public attitudes towards the foreign policies of regional and global powers towards the Arab world are broadly negative.
- Public opinion regarding German, Chinese, and Turkish foreign policy is more positive than it is towards those of other international and regional powers.
- The Arab public's most negative foreign policy evaluation in the 2019-2020 AOI poll is of the US, Russian, Iranian, and French foreign policies.
- Around 58% of respondents held negative views of US foreign policy towards Arab countries; 58% also had negative views of Iran's Arab policies; and 41% expressed negative views of Russia's policy towards the Arab states.

Figure 75: Foreign policy assessments.



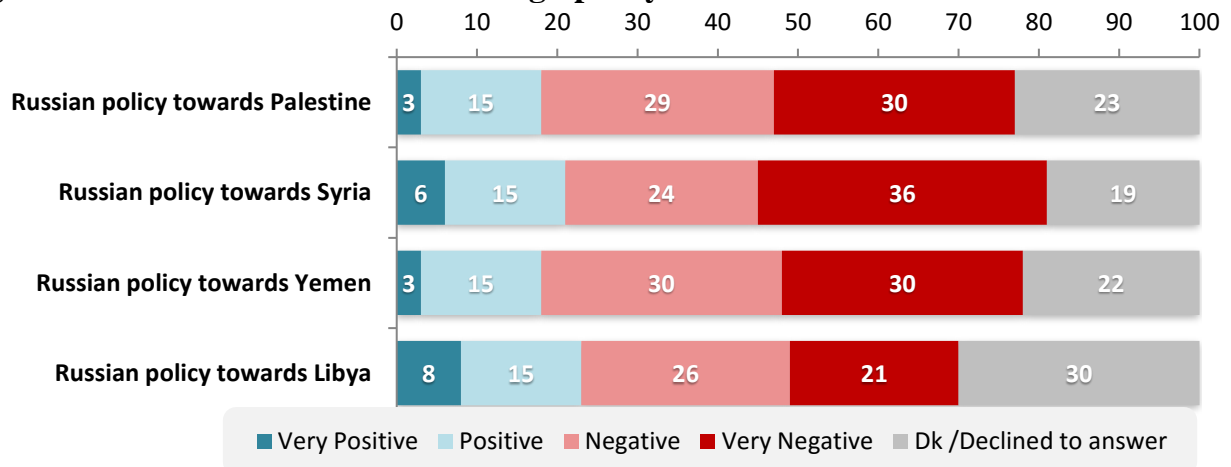
- When asked to look at specific US foreign policy areas, vast majorities of Arabs had negative views of US policy towards Palestine (81%); Syria (81%); Yemen and Libya (72% each).

Figure 76: Assessment of US foreign policy



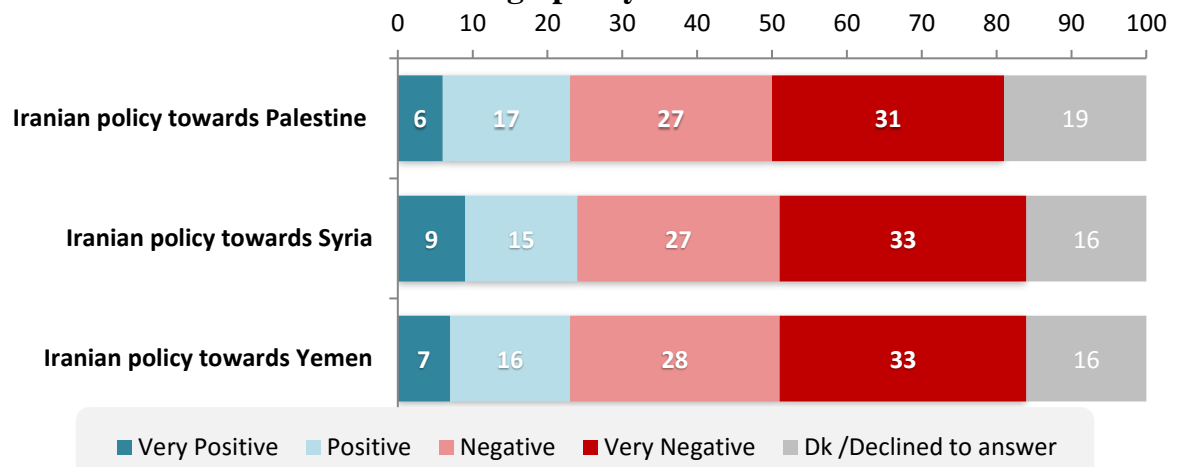
- When asked to look at specific Russian foreign policy areas, the majority of Arab respondents have negative views of Russian policy towards Palestine (59%), Syria (60%), and Yemen (60%).

Figure 77: Assessment of Russian foreign policy



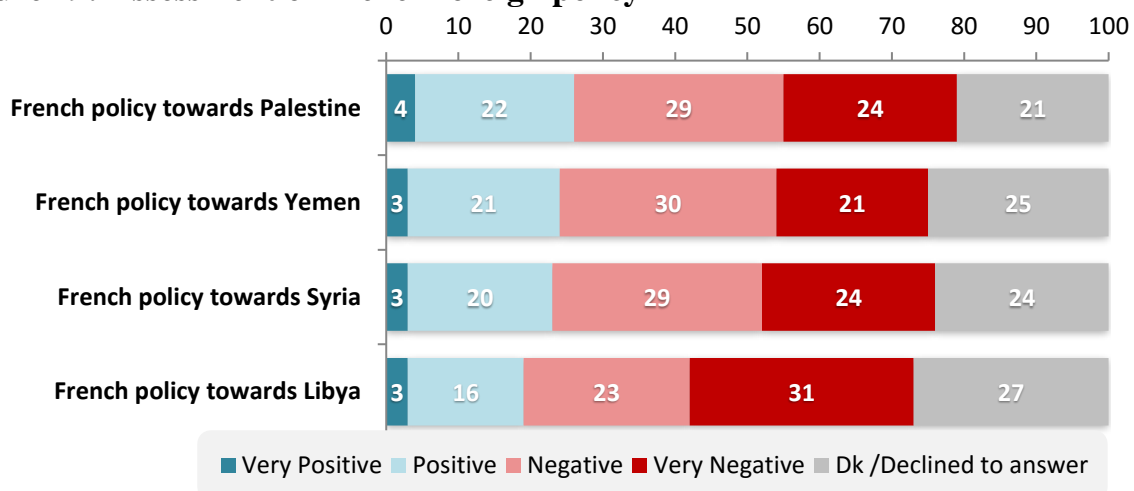
- Arabs assess Iranian foreign policy in the region negatively; over half of the respondents have negative views of Iranian policy towards Palestine (58%), Syria (60%), and Yemen (61%).

Figure 78: Assessment of Iranian foreign policy



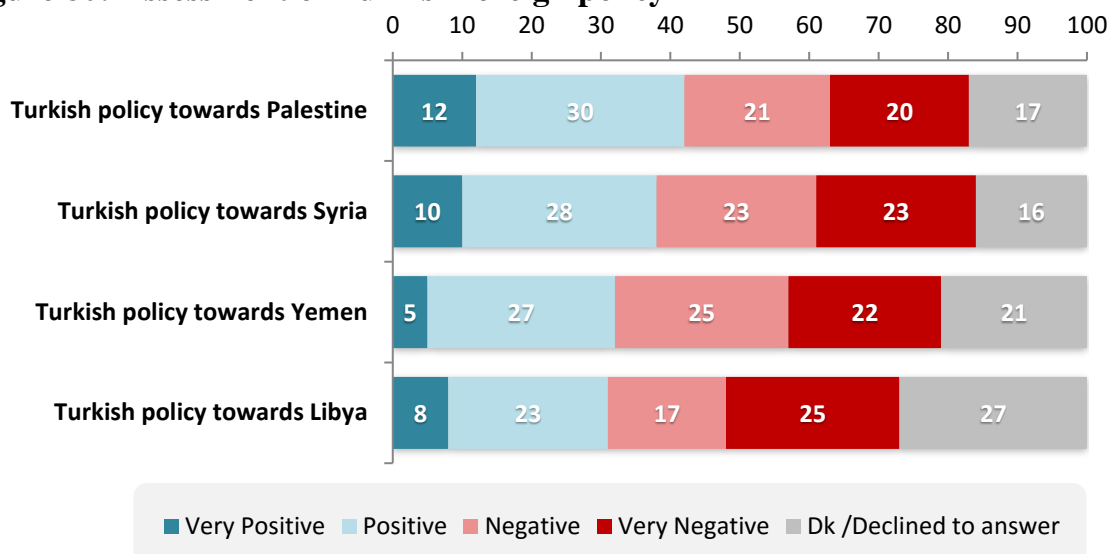
- 54% of Arab respondents view French policy towards Libya negatively. They also have a negative view of French policy towards Palestine (53%), Syria (53%), and Yemen (51%).

Figure 79: Assessment of French foreign policy



- In contrast, the Arab public is roughly equally split in its perceptions of Turkish foreign policy in Libya: 31% views it positively, compared to 32% who view it negatively. It is worth noting that 27% declined to answer. Similarly, 41% of the respondents had positive views of Turkey's policies towards Palestine, compared to 42% who had negative views of Ankara's policies.

Figure 80: Assessment of Turkish foreign policy



Which state poses the greatest threat to the Arab world's security?

- 66% of Arab public opinion considers that Israel and the United States combine as the two countries that most threaten the security of the Arab world, while Iran comes in third place with 12%.
- The respondents of the Arab Maghreb were highest in their assessment of Israel as the country most threatening to the security of the Arab world, while respondents in the Arab Mashreq were the highest in assessing the United States as the greatest security threat.
- 89% of Arabs believe that Israel poses a threat to the security and stability of the region. 81% believes that the United States poses a threat to the security and stability of the region.
- 67% of the respondents expressed their belief that Iranian policies threaten the security and stability of the region, while this percentage was 55% with regard to Russian policies, and 43% with regard to French policies.

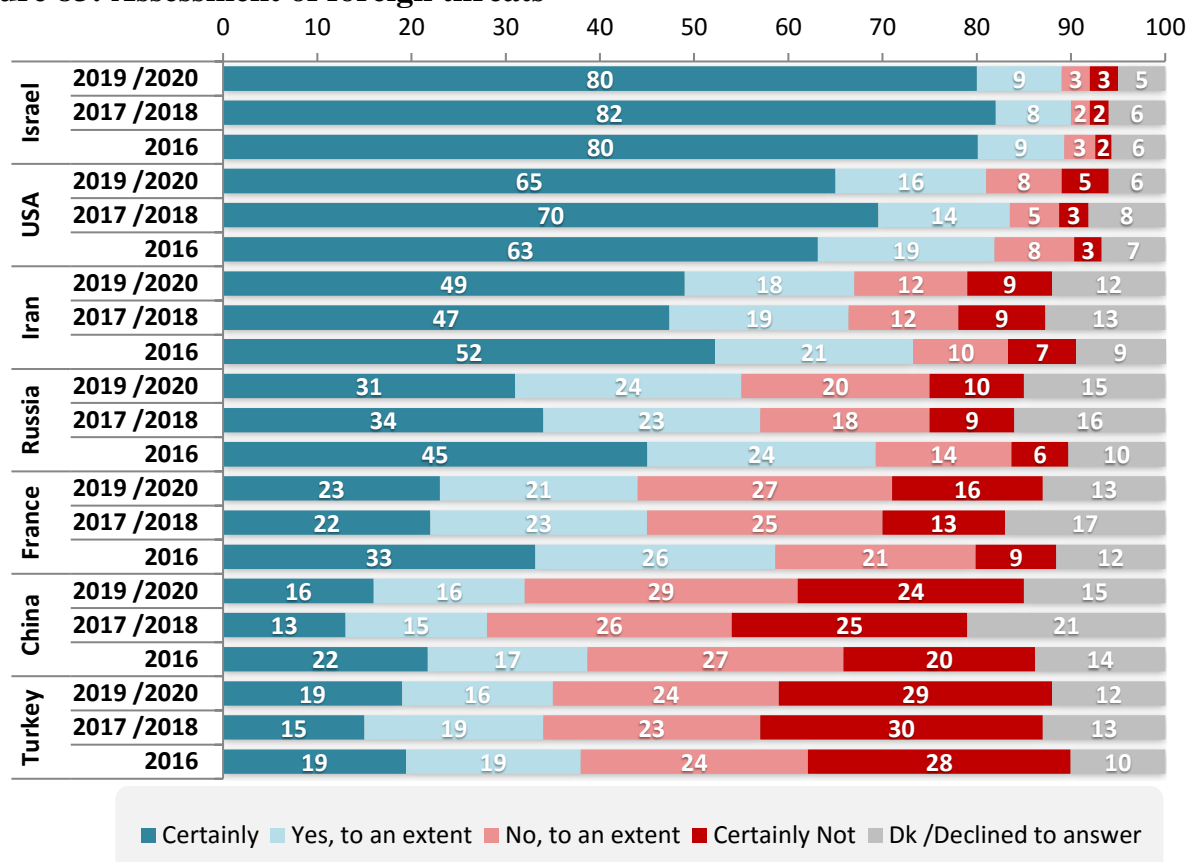
Figure 81: States poses the greatest threat to the Arab Countries

	2020/2019	2018/2017	2016	2015	2014	2013/2012	2011
Israel	37	39	41	45	42	52	51
United States	29	28	27	22	24	21	22
Iran	12	10	10	10	9	6	4
Arab Countries	5	7	5	5	5	3	2
Russia	1	2	3	1	--	--	--
European Countries	1	1	1	1	2	1	--
Other countries	1	1	1	1	1	0.3	1
Others	1	0	1	1	0.1	--	0.2
No threats	2	4	1	1	1	1	0.4
DK/ Declined to answer	11	8	9	12	17	15	19
Total	100	100	100	100	100	100	100

Figure 82: States poses the greatest threat to the Arab Countries by region

States poses the greatest threat to the Arab Countries	The Gulf	Nile Valley	The Levant/ Mashreq	The Maghreb	Aggregate
Israel	41.4	38.3	35.8	31.1	37.0
United States	24.2	28.0	38.3	22.6	29.0
Iran	3.9	14.2	13.3	19.8	12.0
Arab Countries	6.7	3.4	4.8	4.2	5.0
Russia	0.8	1.9	0.9	0.5	1.0
European Countries	0.9	1.3	0.2	0.1	1.0
Other countries	0.8	0.8	0.3	0.2	1.0
Others	0.3	6.4	0.6	0.3	1.0
No threats	18.7	4.9	5.4	16.0	11.0
DK/ Declined to answer	2.5	1.1	0.7	4.9	2.0
Total	100.0	100.0	100.0	100.0	100.0

Figure 83: Assessment of foreign threats



How do Arab citizens view the Palestinian Issue?

- Over three quarters of the Arab public agree that the Palestinian cause concerns all Arabs, and not the Palestinians alone.
- It should be noted that 89% of Saudis agreed that the Palestinian issue is the issue for all Arabs and not simply an issue for Palestinians themselves. Gulf public opinion had the highest percentage of respondents considering the Palestinian cause to be an issue for all Arabs, followed by Arab Maghreb public opinion.

Figure 84: Attitudes towards the Palestinian cause by country

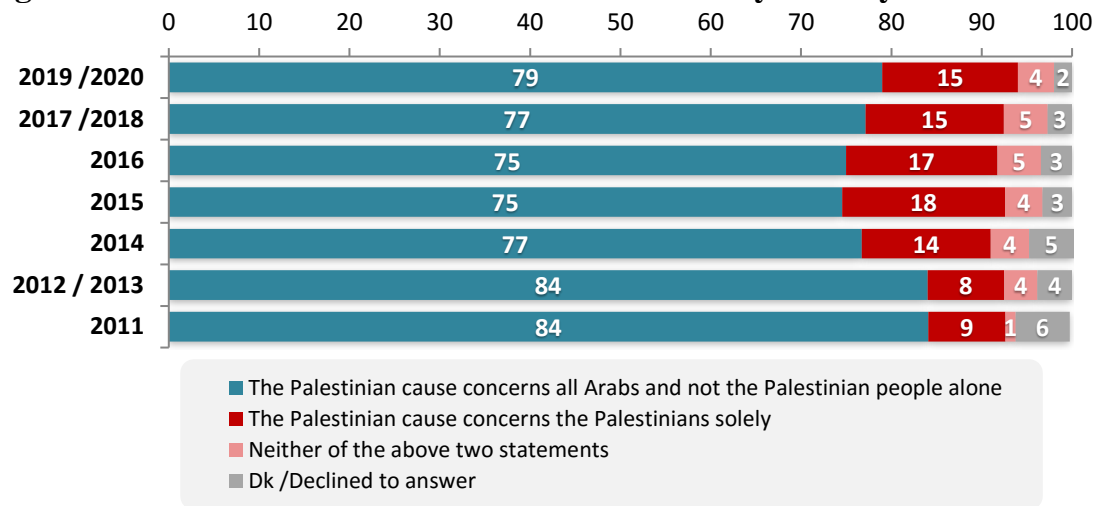


Figure 85: Attitudes towards the Palestinian cause by country

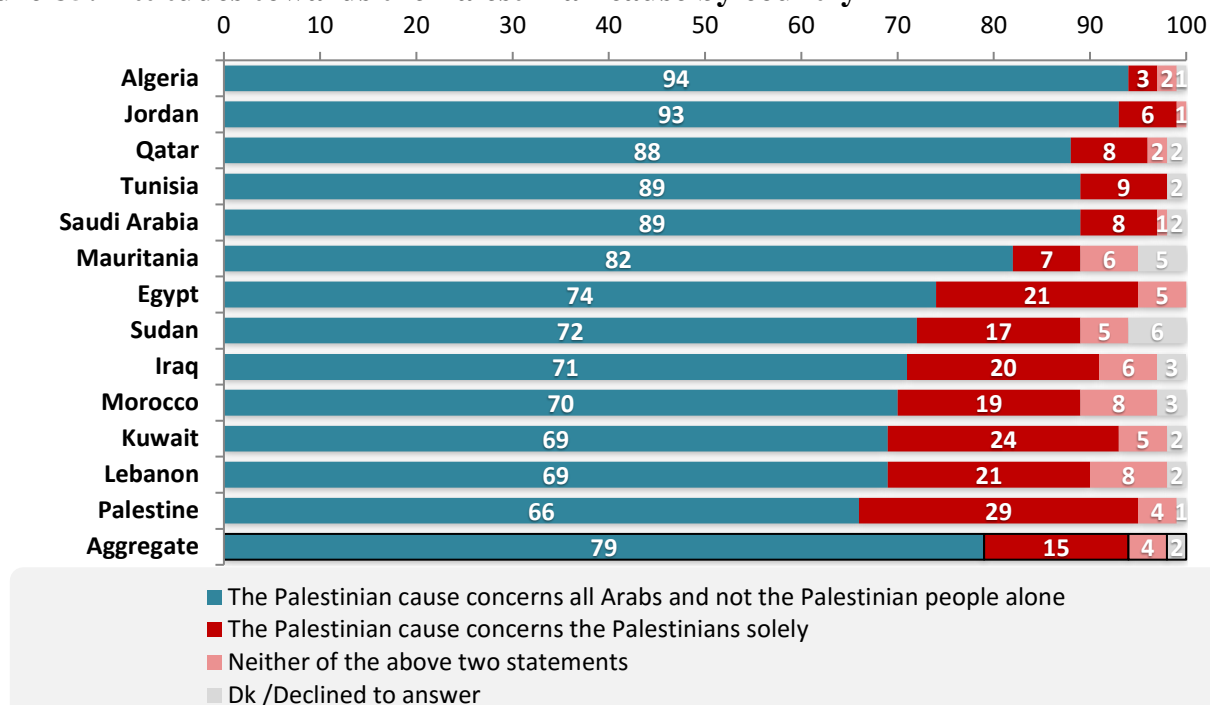
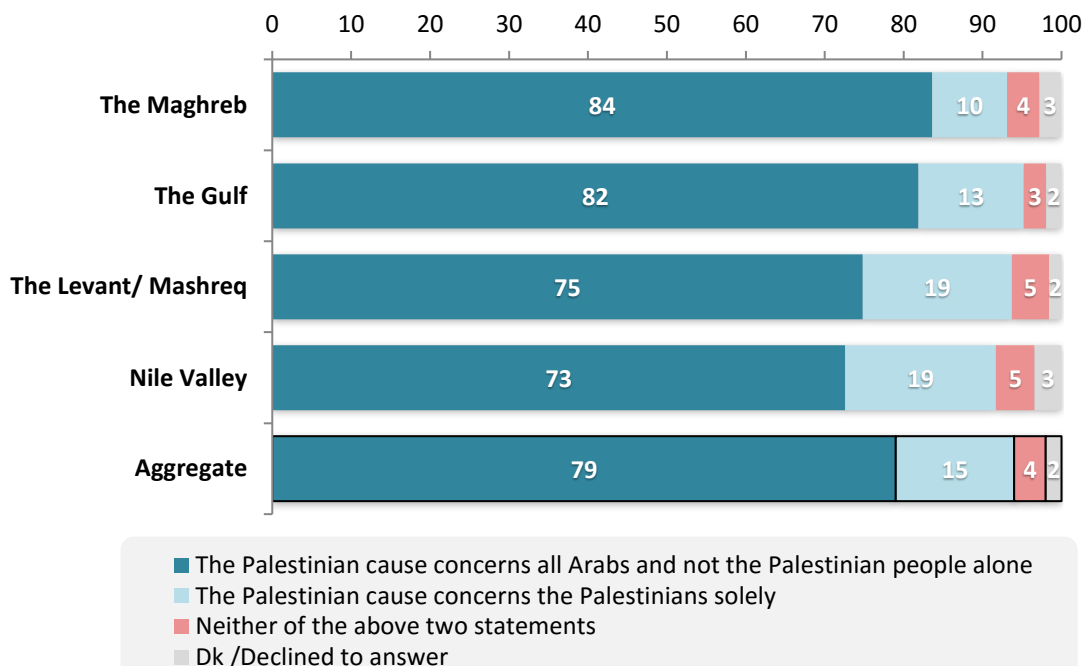


Figure 86: Attitudes towards the Palestinian cause by country



- An overwhelming majority (88%) of Arabs disapprove of recognition of Israel by their home countries, with only 6% accepting formal diplomatic recognition. In fact, one half of those who accepted formal diplomatic relations with Israel and their governments made such a move conditional on the formation of an independent Palestinian state. When asked to elaborate on the reasons for their positions, respondents who were opposed to diplomatic ties between their countries and Israel focused on several factors, such as Israeli racism towards the Palestinians and its colonialist, expansionist policies.
- The highest rate of refusal to recognize Israel was among respondents in Algeria at 99%, followed by those in Lebanon at 94%, and Tunisia and Jordan at 93% each.
- Refusal to recognize Israel is proportionally the highest in the Gulf region; nearly 90% of Qatar and Kuwait respondents reject their country's recognition of Israel, and 65% of Saudis expressed their rejection, as contrasted with 6% who agreed to recognition, while 29% refused to express their opinion.
- Only 13% of the Sudanese agreed that their country should recognize Israel, compared to 79% of them who rejected such a step.

Figure 87: Would you support or oppose diplomatic recognition of Israel by your country?

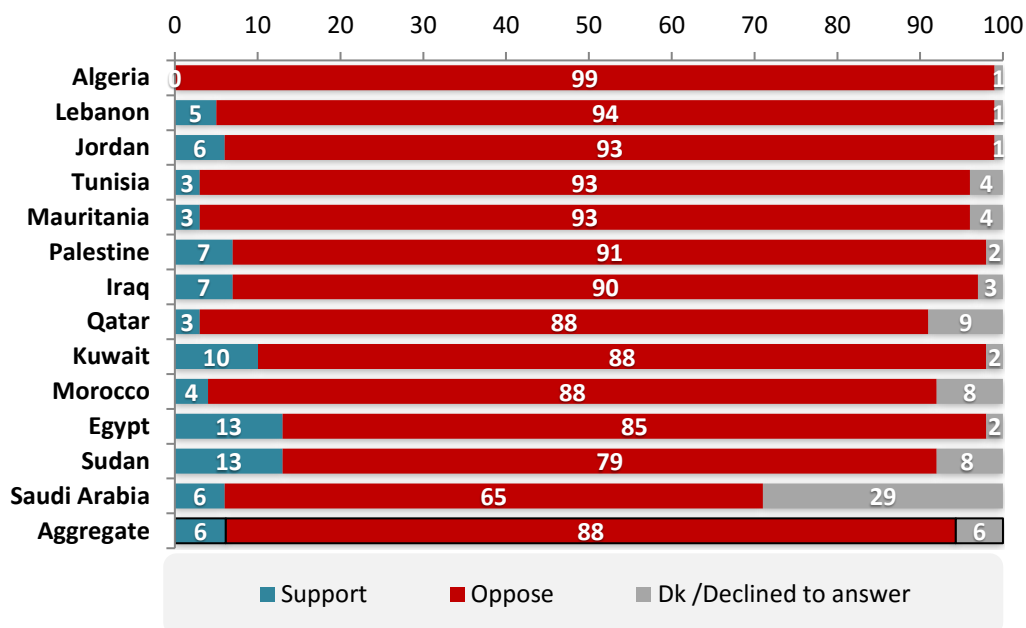


Figure 88: Would you support or oppose diplomatic recognition of Israel over years

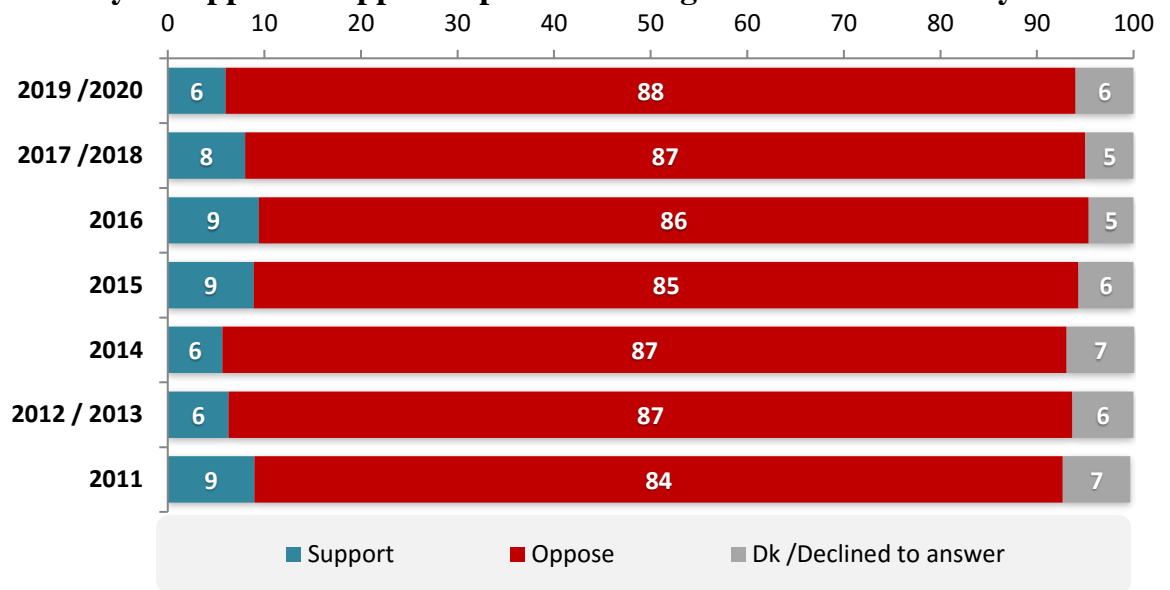
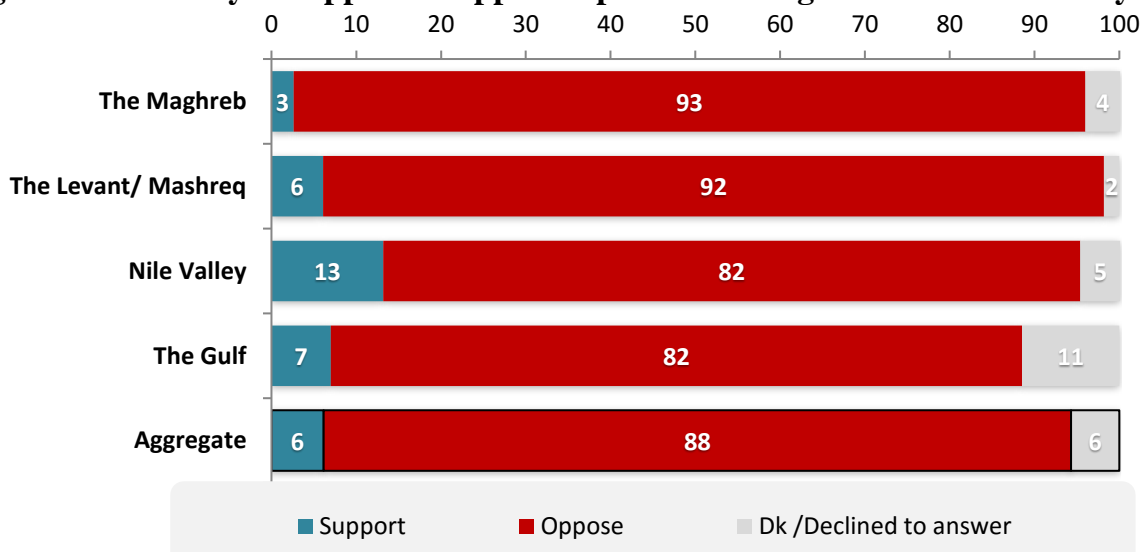


Figure 89: Would you support or oppose diplomatic recognition of Israel over years



- Respondents who opposed diplomatic ties of Israel justified their positions with several reasons, relating mainly to Israel's colonialist nature, racist and expansionist policies, and persistence in appropriating Palestinian land.

Figure 90: Reasons for opposing diplomatic recognition of Israel over time
Reasons given for opposing diplomatic recognition of Israel since 2014 (as a percentage of respondents)

	2019 2020/	2017 2018/	2016	2015	2014
Colonialist occupying power in Palestine	33.7	31.7	27.0	24.5	23.4
Expansionist state set on controlling more Arab territory	9.4	10.1	13.0	13.0	2.4
A terrorist state/supports terrorism	7.6	7.4	7.6	10.4	1.2
Israeli dispossession of the Palestinians; continued oppression of the Palestinians	6.8	8.3	8.1	6.9	5.5
Religious reasons to oppose Israel	6.7	6.6	5.2	3.3	4.9
(Israel) is racist towards Arabs	5.9	6.3	8.2	10.3	12.2
Recognizing Israel negates the Palestinian people	4.8	5.3	5.8	5.6	7.5
Israel is an enemy of my people/the Arabs in general	4.1	3.4	3.3	4.7	11.5
Israel threatens regional security	3.6	3.4	3.2	3.4	2.5
Israel violates agreements and treaties	1.6	1.6	2.1	2.4	2.3
Israel does not exist	2.3	1.1	0.6	0.3	3.4
No reasons given	1.9	1.6	1.8	0.6	10.2
Total of those opposed to recognizing Israel	88.2	86.8	85.9	85.4	87.0
Approve of the recognition of Israel	6.2	7.9	9.5	8.9	6.0
Do not know/declined to answer (as a percentage of respondents)	5.6	5	5	6	7
Total	100.0	100.0	100.0	100.0	100.0

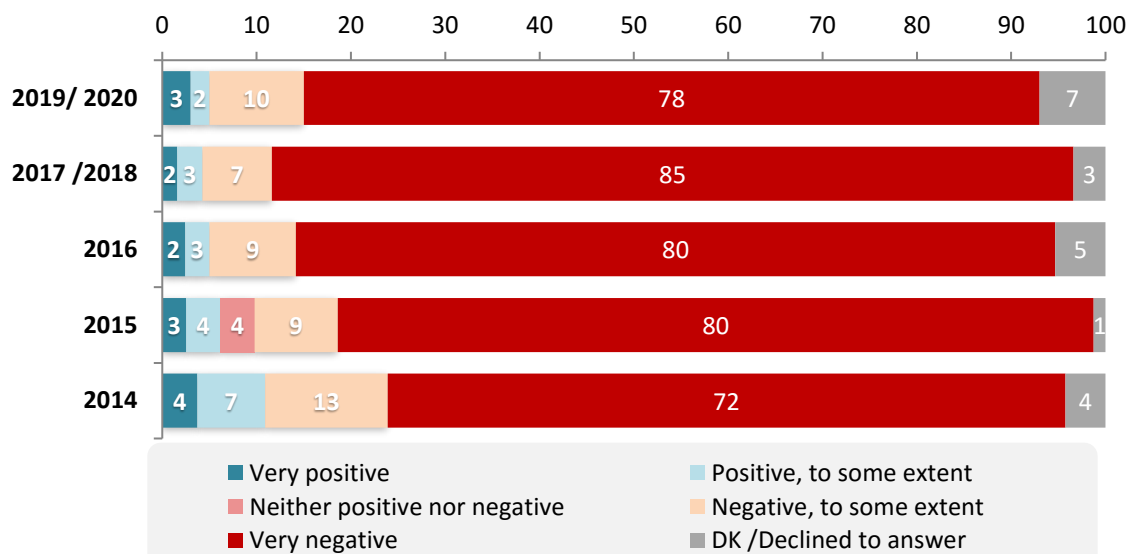
Figure 91: Reasons given for opposing diplomatic recognition of Israel by region

	Mashreq	Maghreb	Gulf	Nile Valley	Average
Colonialist occupying power in Palestine	43.4	36.1	26.0	21.0	33.7
Expansionist state set on controlling more Arab territory	10.4	9.4	8.0	9.5	9.4
A terrorist state/supports terrorism	9.6	4.3	6.5	11.5	7.6
Israeli dispossession of the Palestinians; continued oppression of the Palestinians	5.1	8.4	6.5	7.4	6.8
Religious reasons to oppose Israel	3.6	10.5	6.0	6.3	6.7
(Israel) is racist towards Arabs	5.7	5.7	6.3	6.0	5.9
Recognizing Israel negates the Palestinian people	3.7	5.8	4.5	5.8	4.8
Israel is an enemy of my people/the Arabs in general	4.1	3.6	3.4	6.2	4.1
Israel threatens regional security	3.5	3.4	2.9	4.9	3.6
Israel violates agreements and treaties	1.5	1.5	1.3	2.6	1.6
Israel does not exist	1.1	1.4	6.4	0.1	2.3
No reasons given	0.7	3.1	2.7	0.8	1.9
Total of those opposed to recognizing Israel	92.1	93.2	80.4	82.3	88.2
Approve of the recognition of Israel	6.1	2.6	6.3	13.2	6.2
Do not know/declined to answer (as a percentage of respondents)	1.8	4.1	13.4	4.7	5.6
Total	100.0	100.0	100.0	100.0	100.0

Section 7: Arab Public Opinion towards Extremist Groups (such as ISIS)

- An overwhelming majority of 88% of the Arab public has a negative view of ISIL (or ISIS), with 3% expressing a “positive” view, and 2% “positive to some extent.”

Figure 92: : General view of ISIL



- When asked if the existence of ISIL was either the result of internal factors endemic to the region or the result of foreign activity, only 27% of respondents expressed the view that the group’s existence resulted from the internal conflicts extant in the Middle East, compared to 55% who attributed ISIL’s existence to the policies of foreign powers. When presented with another two statements regarding the origins of ISIL, 42% of respondents were prepared to attribute the rise of ISIL to the extremism inherent in Middle Eastern societies while 33% attributed the rise of ISIL to the policies of Arab regimes.

Figure 93: Respondents asked to select which statement on the nature of ISIL best represents their views.

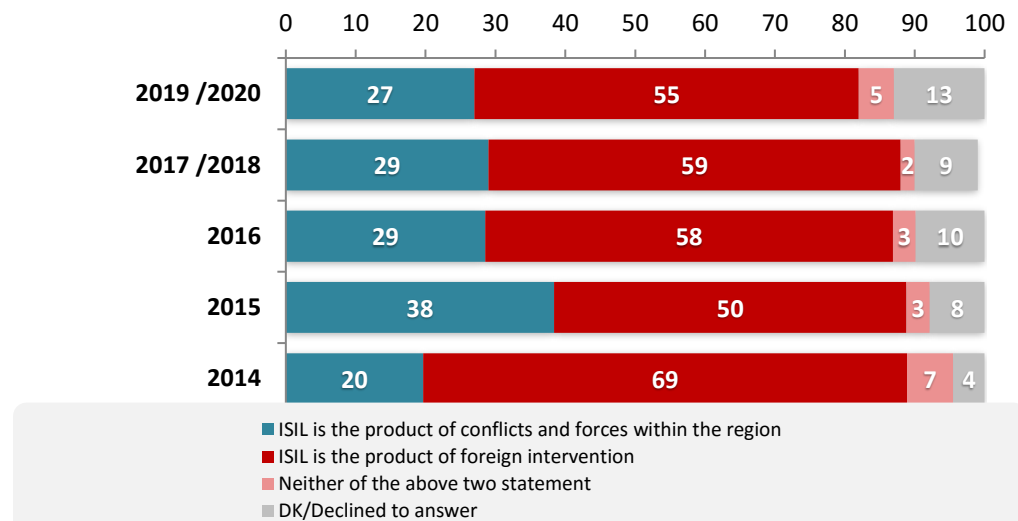
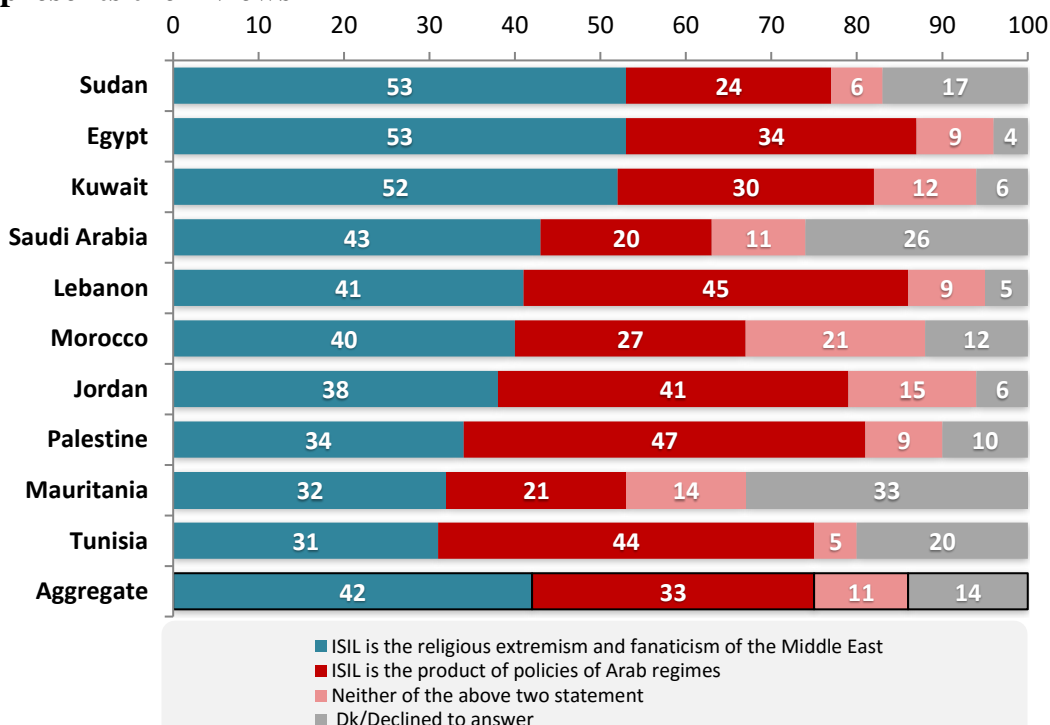


Figure 94: Respondents asked to select which statement on the nature of ISIL best represents their views



- The Arab public offers a diverse set of remedies when asked to suggest the best means by which to combat the extremist groups (ISIL and such), when given the chance to define their first and second preferences for the means to tackle such ISIL in particular, and also terrorist groups more

broadly: resolving the Palestinian cause was the most widely selected first choice, among 17% of respondents; ending foreign intervention in Arab countries was selected as the first choice by 15% of respondents; and 13% of them proposed direct military action.

Figure 95: Proposed remedies to ISIL/terrorism more broadly, first choice made by respondents.

