

EGYPTIAN ATTITUDES

SEPTEMBER 2013



Executive Summary

This poll represents the third time since May 2013 that we have conducted a nationwide survey of Egyptian public opinion. It has been a momentous and tumultuous time for Egypt. During this period our polling has opened a window, allowing us to better understand and track the Egyptian people's changing attitudes toward developments as they unfold: how they view their government and institutions; areas of agreement and disagreement; and their hopes for the future.

MAY 2013

In our May survey we found Egyptian society deeply polarized. Three-quarters expressed both concern with the way the Morsi government was monopolizing power and fear that the Muslim Brotherhood was attempting to impose its ideology on the country.

Egyptians had lost the hope they had in 2011 that positive change would result from their revolution. While 82% said they had been hopeful in 2011, now only 36% retained that hope. The military had the overwhelming support of all segments of Egyptian society (94%), but the country was divided on whether they wanted the military to intervene (44% in favor, 56% opposed). Almost all Freedom and Justice Party (FJP) supporters opposed this action, but 60% of other Egyptians wanted the military to assume control. Overall, the favored options for what to do next were national dialogue (87%) and scrapping the constitution (64%). Of these options, those with confidence in the FJP supported dialogue, but they were nearly unanimous in their opposition to scrapping the constitution, an option that was supported by more than 85% of the rest of the country.

What was clear from that May survey was that the continuing behavior of the Brotherhood's Freedom and Justice Party had alienated three-quarters of all Egyptians. While there were differences as to how to end their rule, it was evident that most Egyptians wanted change.

JULY 2013

In July, following the deposing of the Morsi government, we found that despite continuing division over the military's July 3rd action, many Egyptians felt a renewed sense of hope (68%) and the military still retained an overall 93% positive rating. However, given the tumult and violence that followed the end of the FJP rule, the public was not fully convinced that the interim government would succeed in being able to carry out their "roadmap for change." Only one-third of Egyptians expressed confidence that this government would be able to amend the constitution, create an inclusive democracy, and restore order in the country. At that point, most Egyptians were in a "wait and see" mode.

SEPTEMBER 2013

In our September survey, we find that public opinion in Egypt has become more conflicted and even more polarized. Overall, 60% of Egyptians remain hopeful about the country's future and 83% believe that the situation will improve in the next few years, but the continuing violence has taken a toll. A plurality (46%) of all Egyptians believe that the situation in their country has become worse, not better, since the Morsi government was deposed. Eighty percent (80%) of FJP supporters express this view. But only about one-half of the rest of the country feels that Egypt is better off, with nearly one in five saying that the situation is the same as it was before the military intervened.

The military remains the institution in which Egyptians have the greatest confidence, but their positive rating has declined to 70%, owing to a sharp drop in support from those who identify with the Muslim Brotherhood's FJP and a slight decline in support among liberals and those Egyptians who associate with none of the country's parties.

The country is split down the middle in its view of the military's July 3rd deposing of the Morsi government. The FJP, of course, is unanimous in finding the military's action incorrect, while almost two-thirds of the rest of Egyptians support the deposing of Morsi.

Between July and September, confidence in the interim government of Adly Mansour has increased, with between 43% and 51% now saying that they believe that this government can follow the "roadmap" and restore order to the country – with almost two-thirds of non-FJP supporters now expressing this view.

During the past month, the Muslim Brotherhood's party has consolidated its strength, while at the same time alienating itself from many other Egyptians. Support for the FJP has leveled off at 34%, up from May's 28%. And 79% of all Egyptians still want national reconciliation as the desired goal for Egypt. But now one-half of those who do not support FJP identify the Muslim Brotherhood as the main obstacle to reconciliation and more than 60% of non-FJP supporters want the Brotherhood to be banned from Egyptian politics.

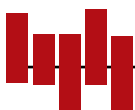
The July poll found Egyptians deeply dissatisfied with the role the United States has played in their country. In September we asked Egyptians about their attitudes toward other countries. Israel, the United States, and Iran received the lowest ratings (0% for Israel, 4% for the U.S., and 9% for Iran), with Saudi Arabia and the UAE viewed positively by more than one-half of all Egyptians. Turkey was favored by only one-third of Egyptians, with Qatar receiving a positive rating from less than one-fifth.

There can be no doubt that Egyptians face real challenges and must address difficult questions as they move forward. Other than retaining optimism about their future, desiring national reconciliation, and continuing to support their military institution, there is very little else on which most Egyptians agree. With the FJP continuing to have the support of about one-third of the country, some effort to achieve national reconciliation will be important. At this point, it appears that the choices made by both the military and the Muslim Brotherhood will be decisive in shaping Egypt's near-term future.

Egypt's other political parties remain weak, with the largest percentage of Egyptians showing confidence in the Tamarrud movement, which is not a party. If the next election is to produce an outcome that reflects the

concerns and aspirations of a substantial number of Egyptians, the organizers of the Tamarrud movement will have to use their discipline and skill to either strengthen the existing parties or transform their movement into an electoral force that can effectively compete.

The real short-term test for Egypt will be the ability of the interim government to produce a new constitution, pave the way for new elections leading to a civilian government, while keeping Egyptians safe and restoring order in the country. To the degree that all parties can find common ground in achieving these goals, the optimism of Egyptians may be rewarded. Should these issues be resolved, Egypt can then focus on the business of meeting what our polls have consistently demonstrated are the country's most pressing needs – rebuilding the economy and creating jobs and opportunities for Egypt's youth. But should the violence continue, the polarization will deepen, and Egypt will continue to a troubled future.



Confidence in Political Parties and Groups

	May 2013	July 2013	September 2013
The Freedom and Justice Party (the Muslim Brotherhood)	26	24	34
The Nour Party	29	22	10
The National Salvation Front	22	12	13
The April 6th Movement	25	22	20
Tamarrud	-	32	35
No confidence in any political party	39	27	17

Level of confidence in ...							
		Total	FJP	Nour	NSF	April 6	Tamarrud
The Freedom and Justice Party (the Muslim Brotherhood)	Confident	34	100	34	20	28	2
	Not confident	59	-	65	78	72	97
The Nour Party	Confident	10	10	100	37	23	14
	Not confident	86	86	-	63	76	84
The National Salvation Front	Confident	13	8	49	100	44	25
	Not confident	84	91	46	-	55	73
The April 6th Movement	Confident	20	16	48	69	100	34
	Not confident	74	79	50	29	-	63
Tamarrud	Confident	35	2	50	69	59	100
	Not confident	62	97	50	30	40	-

For the third time this year, we asked respondents about their confidence in the major political parties and groups in Egypt. What the results indicate is that there is a “sorting out” underway. At this point, Egyptians are more likely to have chosen sides and so the percentage of those who have “no confidence” in any party or group continues to decline, from 39% in May to just 17% in September. There is also considerably less overlap among groups that there was in May. For example, in May 88% of those who had confidence in the Nour Party also had confidence in the Freedom and Justice Party (FJP); today, just 34% of Nour supporters also support the Brotherhood’s party.

Tamarrud retains the largest percentage of confidence (35%), garnering additional support as the National Salvation Front and the April 6th movement have lost some supporters. The Muslim Brotherhood has

consolidated some support, including the addition of support from liberals who do not endorse the current crackdown; the Freedom and Justice Party enjoys the confidence of 34% of respondents, an increase of 8 points since May. The Nour Party and the National Salvation Front (NSF) are in free fall, with support dwindling to just 10% and 13% respectively.

Attitudes From Tahrir Square to Tamarrud and Into the Future

When Hosni Mubarak left power over two years ago, how hopeful were you that it would bring about positive change in Egypt?							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
Hopeful	90	90	90	88	88	90	93
Not hopeful	10	10	10	12	12	10	7

Nine in ten respondents say that when Mubarak left power more than two years ago they were hopeful that it would bring about positive change in Egypt. This view is consistent across the political landscape from those who are confident in the FJP to those whose confidence lies with the Tamarrud movement.

In your opinion, which statement best describes the action taken by the military on July 3rd?							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
It was correct decision for army to depose Morsi and lay out a roadmap leading to amended constitution and new elections.	46	2	57	71	59	96	49
It was incorrect for army to depose Morsi. He was the legitimately elected president.	51	95	43	27	40	4	47

Egyptians are divided on the question of whether the military's action on July 3rd to depose President Morsi was correct or incorrect. Overall, 46% say it was correct to depose Morsi and lay out a roadmap leading to an amended constitution and new elections, while 51% say he was the legitimately elected president and should not have been deposed. But this split is entirely between those with confidence in the Freedom and Justice Party, 95% of whom say it was incorrect, and Tamarrud supporters, 96% of whom say it was correct.

After Tamarrud and the military's action deposing President Morsi, what best describes how hopeful are you now about Egypt's future?									
	May 2013	July 2013	September 2013						
	Total	Total	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
I am still hopeful	36	68	60	41	65	69	67	82	66
Neither hopeful nor disappointed	22	16	28	38	25	26	24	17	23
I am disappointed	41	14	11	19	9	3	8	1	11

A majority of Egyptians are still hopeful about Egypt's future (60%). Although the percentage has dropped since July (68%), it remains significantly higher than it was before Tamarrud (36%). Looking at the most recent survey, those with confidence in Tamarrud are most likely to say they are still hopeful (82%), while those with confidence in the Freedom and Justice Party are least likely to say so (41%). However, it is worth noting that even among these Muslim Brotherhood supporters, only 19% say they are disappointed about Egypt's future.

In your opinion, is Egypt better off or worse off as a result of the June 30th Tamarrud and July 3rd military action?							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
Better Off	35	2	49	58	49	75	34
Worse Off	46	80	40	26	35	8	48
About the same	18	17	11	17	17	17	18

Overall, 35% of respondents say Egypt is better off following the June 30th Tamarrud and July 3rd military action, while 46% say the country is worse off. Those who have some degree of confidence in the Muslim Brotherhood are largely convinced that Egypt is worse off following July 3rd (2% better vs. 80% worse). Others are divided, except for those who identify with Tamarrud, who think Egypt is better off by a wide margin (75% vs. 8%).

Egypt will be better in the next few years...							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
Optimistic	83	72	82	91	86	96	85
Pessimistic	15	27	16	7	12	2	14

Still, there is an overwhelming sense of optimism in considering the next few years. Overall, 83% say Egypt will be better in a few years, and this sentiment is widely shared regardless of political leaning with 72% of FJP supporters and 96% of Tamarrud supporters in agreement.

Confidence in Egyptian Leaders

Level of confidence in ...		Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
Adly Mansour	Confident	39	5	47	60	51	79	40
	Not confident	58	92	47	36	48	18	55
Abdel Fattah El Sisi	Confident	46	5	58	70	60	94	49
	Not confident	52	93	42	30	39	5	49
Mohamed Morsi	Confident	44	85	39	28	37	6	34
	Not confident	54	12	61	71	62	94	64
Muhammed El Baradei	Confident	6	8	9	2	2	3	5
	Not confident	88	87	88	94	95	93	91

Abdel Fattah El Sisi has the strongest support of the four leaders we measured (46%), but overall confidence in him remains below 50% because of strong opposition by FJP (93% not confident) and weak support from those who have no confidence in any party or group (49% confident). El Sisi has the overwhelming confidence of those who have also confidence in Tamarrud (94%), as well as considerable backing from supporters of the National Salvation Front (70%) and April 6th (60%).

Again, those who support FJP have no confidence in Adly Mansour; just 5% are confident in him. Those who are confident in the Tamarrud are very supportive of Mansour (79%), while supporters of the Nour, National Salvation Front, and the April 6th movement are divided. Those with no confidence in any political group tend to have less confidence in Mansour (40% vs. 55%).

Overall, Morsi's level of support (44%) is similar to El Sisi's; however, his base of support is the exact opposite, with 85% of those with confidence in the Freedom and Justice Party expressing confidence in him and at least six in ten respondents whose confidence rests in the other groups saying they have no confidence in him.

Muhammed El Baradei has lost support across the board, with just 6% of respondents saying they have confidence in him.

Confidence in Institutions

Level of confidence in ...		Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
The army	Confident	70	48	76	87	84	99	65
	Not confident	24	42	23	12	14	1	33
Judiciary	Confident	54	28	70	82	74	91	48
	Not confident	42	67	30	18	25	7	49
Police	Confident	49	19	63	74	66	88	47
	Not confident	50	80	37	25	33	12	53

Confidence in the army has dropped from 93% in July to 70% in September. Not surprisingly, the biggest decline is from those who have confidence in the Muslim Brotherhood (88% in July to 48% in September); those with no confidence in any political group have also lost some of their faith in the army, with confidence falling from 91% in July to 65% in September.

Confidence in the judiciary has also fallen somewhat in recent months, with 67% overall expressing confidence in May and 54% expressing the same in September. Again, this decline is due to a reversal among Muslim Brotherhood supporters, from 61% confident in May to 28% in September, and among those with “no confidence,” from 65% to 48%.

While confidence in the police overall is basically stable (52% in May to 49% in September), those with confidence in the Muslim Brotherhood’s party have lost confidence (from 58% to 19%), while those who have confidence in the other political groups have gained confidence.

Confidence in the Interim Government

The Interim Government of Adly Mansour							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
Confident	42	12	52	61	54	79	38
Not confident	52	82	40	34	41	16	54

Confidence that the interim government/ military will make progress in . . .								
		Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
Implementing the roadmap that will lead to an amended constitution and new elections for a civilian government	Confident	44	9	57	69	59	86	42
	Not confident	53	87	41	30	39	12	54
Creating the framework for a more inclusive democracy in Egypt	Confident	43	9	54	66	57	83	41
	Not confident	54	87	43	31	42	13	55
Keeping us safe and restoring order	Confident	51	16	69	80	68	93	49
	Not confident	45	78	31	18	32	6	47

With the exception of FJP supporters, Egyptians are still in “wait-and-see” mode about Adly Mansour’s government. Overall, 42% have confidence in this interim government, including 79% of those who identify with Tamarrud and just 12% of Freedom and Justice Party supporters; of those with no confidence in any political group, 38% have confidence in the Mansour government.

Since July, the interim government has raised the overall confidence levels with respect to “implementing the roadmap that will lead to an amended constitution and new elections for a civilian government” by 11 points, “creating the framework for a more inclusive democracy in Egypt” by 7 points, and “keeping us safe and restoring order” by 13 points. The biggest increases in confidence are among those with no confidence in any political group, from 14%, 16%, and 21% in July, to 42%, 41%, and 49% in September, respectively, for the three issues mentioned above (i.e., roadmap for constitution and elections, more inclusive democracy, and safety and order).

The Muslim Brotherhood and National Reconciliation

Regarding the future of the Muslim Brotherhood, with which of the following statements do you most agree?							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
It is important that an agreed formula be found to include the Muslim Brotherhood in politics.	42	77	62	45	51	15	31
The Muslim Brotherhood should be banned from politics.	50	15	36	53	45	83	58

How important a goal should achieving national reconciliation be for the future of Egypt?							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
Important	79	89	83	76	80	68	79
Not important	21	11	17	24	20	32	21

Which element presents the biggest obstacle to national reconciliation?							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
The military	23	49	28	15	20	2	16
The Muslim Brotherhood	35	4	41	54	44	72	32
The mood of the people	16	16	18	16	18	16	20
All of the above	17	28	5	7	10	2	20

When asked about the inclusion of the Muslim Brotherhood in politics and support for national reconciliation, respondents express somewhat contradictory views. A slight majority wants the Muslim Brotherhood banned from politics (50% vs. 42% who think there should be an agreed upon formula for inclusion), while almost eight in ten say national reconciliation is an important goal.

With respect to the inclusion of the Brotherhood in Egyptian politics, the poll numbers reflect the public positions taken by the groups. Those who have confidence in April 6th and the National Salvation Front are divided; Freedom and Justice Party and Nour Party supporters want a formula for inclusion; and those with

confidence in the Tamarrud are strongly in favor of banning the Muslim Brotherhood. Those with no confidence in any group are also in favor of excluding the Brotherhood from politics (58% vs. 31%).

Yet, 79% of respondents across the political spectrum favor national reconciliation, saying it is an important goal. Those with confidence in the Tamarrud are the least supportive, but are still two-to-one in favor of reconciliation (68% vs. 32%)

When asked which element presents the biggest obstacle to national reconciliation, only those with confidence in Tamarrud exclusively blame the Muslim Brotherhood (72%). Those with confidence in the Freedom and Justice Party blame the military (49%). Pluralities of all other groups blame the Muslim Brotherhood, with about one in five also blaming the military.

Responsibility for Egypt’s Current Problems

Do you find the following responsible for the current problems facing Egypt today?								
		Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
The Mubarak government	At fault	98	98	99	98	98	97	98
	Not at fault	1	1	1	1	1	2	1
The Morsi government	At fault	83	66	87	88	81	97	89
	Not at fault	15	31	12	11	15	2	9
The Adly Mansour government	At fault	34	57	34	20	28	8	36
	Not at fault	60	36	64	74	68	88	57

Of the following, which do you hold most responsible for the current problems facing Egypt?							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
The Mubarak government	70	81	80	73	65	49	82
The Morsi government	26	11	15	27	30	50	14
The Adly Mansour government	4	8	5	-	5	1	4

Almost universally, respondents say the Mubarak government is at fault for the problems facing Egypt today. The Morsi government gets slightly less blame from most groups; only those with confidence in the Tamarrud blame both Mubarak and Morsi the same. Even two-thirds of FJP supporters say that the Morsi government is at fault for the current situation. Overall, only one-third of respondents say the Adly Mansour government is at fault; among supporters of the Brotherhood, however, a majority blame Mansour for the country’s current problems.

When asked which of the three governments is most responsible, respondents across the political spectrum point to Mubarak’s government (70% overall), except for those with confidence in the Tamarrud who are split between holding Mubarak and Morsi responsible (49% vs. 50%).

Favorable/Unfavorable

Favorability of each of the following								
		Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
The United States	Favorable	4	9	6	4	10	2	1
	Unfavorable	94	91	94	96	90	96	99
The European Union	Favorable	10	12	4	13	11	11	4
	Unfavorable	86	86	93	85	86	86	91
Israel	Favorable	0	0	0	0	0	0	0
	Unfavorable	98	100	100	100	100	100	95
Iran	Favorable	9	11	21	16	10	8	9
	Unfavorable	84	82	77	80	84	86	86
Saudi Arabia	Favorable	58	25	66	71	67	92	64
	Unfavorable	42	74	34	28	33	7	36
UAE	Favorable	52	17	66	72	64	91	55
	Unfavorable	47	82	34	27	35	9	43
Qatar	Favorable	19	35	17	15	17	3	16
	Unfavorable	79	63	82	84	80	95	80
International Monetary Fund (IMF)	Favorable	27	27	19	28	25	26	27
	Unfavorable	67	67	76	67	67	66	67
Turkey	Favorable	36	62	35	22	28	7	28
	Unfavorable	61	34	64	77	69	91	69

The United States and Israel receive little or no favorable ratings from Egyptian respondents (4% and 0%, respectively). The European Union and Iran do only slightly better; about one in ten overall view them favorably. With respect to Iran, respondents who identify with the various political groups are basically in agreement, except those with confidence in the Nour who give Iran slightly higher favorables (21%).

More than half of Egyptians have a favorable view of Saudi Arabia and UAE, with strong favorables from all groups except the Muslim Brotherhood (25% and 17%, respectively). Qatar is favored by only one in five respondents. Even among supporters of the Freedom and Justice Party only 35% have a favorable view of Qatar, despite the substantial economic and political support Qatar gave the Muslim Brotherhood.

One-third of respondents have a favorable view of Turkey, though among those with confidence in the FJP 62% rate Turkey favorably.

Only about one-quarter of respondents, both overall and among the political groups, have a positive view of the International Monetary Fund.

Thoughts on Emigration

All in all, are you satisfied with your prospects in Egypt or have you thought of emigrating to another country?							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
I am satisfied	60	48	67	69	64	70	65
I have thought of emigrating	16	22	12	9	14	12	15
I am unsatisfied but emigration is not a realistic option for me	24	30	21	22	22	18	20

If so, where?							
	Total	FJP	Nour	NSF	April 6	Tamarrud	No Confidence
Another Arab country	65	62	63	53	62	59	78
Europe	19	20	6	18	10	20	16
The United States	6	4	13	24	8	12	3
Latin America	2	5	13	6	5		
Asia	7	10	6		15	8	3

Six in ten respondents say they are satisfied with their prospects in Egypt, while 16% say they have thought of emigrating and 24% are unsatisfied but could not realistically emigrate. These numbers are fairly consistent across the political spectrum, though FJP supporters are the least likely to say they are satisfied with their prospects (48%).

Of those who have considered emigration, two-thirds would move to another Arab country and 19% would choose Europe.

APPENDIX — METHODOLOGY AND DEMOGRAPHICS

Methodology

The approach used for conducting the poll involved 1,405 face-to-face, in-home personal interviews conducted September 16-28, 2013. A multi-stage sampling methodology was employed for the selection of respondents. The sample obtained was nationally representative and comprised adult males and females, who were 18+ years of age. The interviews were conducted in both urban and rural areas to ensure robust data and representation of a wide cross-section of Egyptians. The centres covered were Cairo, Giza, Alexandria, Port Said, Suez, Mansura, Tanta, Shubra Al Kheemah, Asyut, Menia, and Bani Suwayf. Based on a confidence interval of 95%, the margin of error is +/- 2.7 percentage points. This means that all other things being equal, the identical survey repeated will have results within the margin of error 95 times out of 100.

Throughout the analysis, data in the tables may not add up to 100% because of rounding and/or because responses of “not sure” are not shown. In addition, for the purposes of analysis and data presentation, some responses have been aggregated. For example, responses of “very favorable” and “somewhat favorable” are aggregated into “Favorable,” while responses of “somewhat unfavorable” and “very unfavorable” are aggregated into “Unfavorable.”

Demographics

Live in city	57
Live outside city	43
Illiterate	27
No formal education	12
Primary/Prep	20
Secondary/Incomplete university	6
Tech/Intermed/High	25
University or more	9
Muslim	90
Christian	10
Male	50
Female	50
Under 30	37
30-49	39
50+	24



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