

# TODAY'S MIDDLE EAST

## Pressures & Challenges



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# Contents

Executive Summary ..... 1

I. Arab Spring ..... 7

II. The Role of the Muslim Brotherhood..... 11

III. Syria ..... 12

IV. The Future of Iraq ..... 19

V. How Others See Iran and Its Policies ..... 21

VI. How Iranians View Their Country and Its Policies..... 25

VII. Impact of Other Countries on the Peace and Stability of the Arab World ..... 29

VIII. Concern with Christians and Other Non-Muslim Minorities,  
and Concern with the Rise of Sectarian Division..... 31

Methodology and Demographics ..... 33

## List of Tables

Table 1. The Arab Spring and the Arab World .....	7
Table 2. The Arab Spring and the situation in my country .....	7
Table 3. Better off or worse off than before the Arab Spring.....	8
Table 4. Better off or worse off in five years.....	9
Table 5. The role of the Muslim Brotherhood .....	11
Table 6. Choosing sides in the Syrian conflict.....	12
Table 6a. Sunni vs. Shia opinion: Choosing sides in the Syrian conflict .....	12
Table 7. The worst outcome in Syria .....	13
Table 7a. Sunni vs. Shia opinion: The worst outcome in Syria.....	13
Table 8. A negotiated solution to the Syrian conflict .....	14
Table 9. Impact of other countries on Syria .....	14
Table 9a. Sunni vs. Shia opinion: Impact of Iran and Saudi Arabia on Syria.....	16
Table 10. Syrian conflict and sectarian tensions .....	16
Table 10a. Sunni vs. Shia opinion: Syrian conflict and sectarian tensions.....	17
Table 11. Impact of Syrian refugees .....	17
Table 12. Does ISIS pose a threat? .....	18
Table 13. Support for Western-led intervention to combat ISIS .....	18
Table 14. The best future for Iraq .....	19
Table 15. An independent Kurdistan.....	19
Table 16. Iraq in five years .....	20
Table 17. Iran's role in other countries .....	21
Table 18. Has Iran under President Rouhani moved in a positive direction? .....	22
Table 19. Relations between your country and Iran .....	22
Table 20. Should your country have friendlier relations with Iran?.....	22
Table 21. The intent of Iran's nuclear program .....	23
Table 22. Negotiations between the United States and Iran .....	24
Table 23. Iran: Better off or worse off than five years ago .....	25
Table 24. Iran: Better off or worse off in next three years .....	25
Table 25. Iran: Assessing Rouhani's job performance .....	25
Table 26. Iran: Foreign policy impact.....	26
Table 27. Iran: Importance of foreign policy .....	27
Table 28. Iran: Opinion on nuclear weapons .....	27
Table 29. Iran: Nuclear program and sanctions .....	27
Table 30. Contributes to peace and stability in the region .....	29
Table 31. Christians and other non-Muslim minorities .....	31
Table 32. Growth of sectarian division .....	31

# Executive Summary

From September 4 to October 3, 2014, Zogby Research Services conducted face-to-face polling in eight Middle East countries (Egypt, Lebanon, Jordan, Iraq, Saudi Arabia, the United Arab Emirates, Iran, and Turkey). A total of 7,567 adults were surveyed on their attitudes toward: the still unfolding developments of the Arab Spring; the role played by the Muslim Brotherhood; the conflict in Syria; the future of Iraq; the regional role played by Iran; the impact of other countries on the region; and concern with the growth of sectarianism. We also asked Iranians for their opinions on their own government's foreign and domestic policies. Because ZRS had surveyed regional views on similar issues in 2011 and 2012, and had conducted an internal poll of Iranians in 2013, we have a body of data with which we can compare attitudes over the past four years.

## I. Arab Spring

1. Since 2011 across the Arab World **there has been a souring of attitudes about the “Arab Spring.”** In the five Arab countries surveyed in both 2011 and 2014, the percentage of those who say the region is better off has declined, while **the percentage of those who say the region is worse off has increased.** The most significant negative assessments of the Arab Spring's impact on the region come from Jordanians and Egyptians. Only in the UAE do a majority of respondents give a positive assessment of developments in the region and their country since the Arab Spring began in 2011—largely owing, in all probability, to the general state of well-being among citizens and residents in the Emirates.
2. When asked to assess whether countries impacted by the Arab Spring are better off or worse off than they were five years ago, attitudes are mixed. **Tunisia is rated as a significant success story in three of the seven countries surveyed.** Yemen scores well in Jordan, Iraq, Saudi Arabia, and the UAE (but note that half of this survey took place before Houthi rebels overran Sanaa, unsettling the arrangement that had been in place in Yemen for the past few years). **Egypt is viewed as much better off only in the UAE,** which has invested heavily in the success of the newly elected government there.
3. When asked to project prospects for success in the next five years, once again Tunisia leads the way, with four of the seven countries surveyed expressing confidence that Tunisia will be much better off. Prospects for success in Egypt are rated high in three of the surveyed countries—with those in Saudi Arabia and the UAE expressing the greatest optimism in Egypt's future. **Syria and Libya are not given much chance for progress in the next five years.**

## II. The Role of the Muslim Brotherhood

1. Saudi Arabia and Turkey are the only countries where a majority of respondents give the Muslim Brotherhood positive ratings for their roles in Egypt and Tunisia. Attitudes in Jordan are positive, though less so. **Only Arabs in the UAE give the Muslim Brotherhood's role strong negatives in both instances.**
2. It is interesting to note that **Egyptian attitudes toward the Muslim Brotherhood are divided**, with positive and negative attitudes nearly even. This continues the trend we have observed in Egypt since the 2013 crackdown on the group.
3. **In no country other than Turkey do respondents see the role of the Muslim Brotherhood in their country as positive.**

## III. Syria

1. When asked what outcome they most favor for Syria, **half or more of the respondents in five of the eight countries support victory for the internationally recognized Syrian opposition.** The only outliers are the Lebanese and Iranians (where majorities favor the regime of Bashar al Assad) and **Turkey (where a strong plurality favors victory for Jabhat al Nusra, followed by the Islamic Front).**
2. Pluralities or majorities in **four of the seven countries surveyed say the worst outcome for Syria would be Assad's remaining in power**, followed closely by the fear that Syria would fragment into sect- or ethnic-based entities. In all countries except Iran and Lebanon, concern for these two outcomes far outweighs concern that Syria might fall under the control of extremists.
3. **There is little hope for a negotiated solution to the Syrian conflict. Only respondents in Saudi Arabia express any confidence in a negotiated solution.**
4. When asked to assess the impact of a number of foreign powers on the situation in Syria, **respondents give the United States the poorest scores.** It is rated negatively in every country covered in the poll. The United States garners its lowest negative rating from Iran, where one-half of respondents say the United States has no impact on Syria. (Note that this poll was conducted after the United States began bombing ISIS targets in Iraq, but largely before the bombing of ISIS targets in Syria.) **The next poorest rating is received by Iran.** It earns positive, though declining, scores only from the Lebanese. Next in line is Qatar which receives negative scores from respondents in four countries.
5. Turkey receives mixed ratings, scoring strong positives in Jordan, Saudi Arabia, and Iraq, and only registering negative scores in Egypt and Iran. Saudi Arabia's impact on Syria is viewed positively by Egypt and the UAE, and negatively in all the other countries surveyed.
6. Majorities in Lebanon, Jordan, and Iraq say that **the influx of Syrian refugees has had a negative impact** on their country's security. A majority of Turks say the refugees have had



no impact on security. The Jordanians and Turks appear to have the strongest feelings as to whether these refugees have had a negative impact on the economies of their countries. Lebanese have mixed views on this subject, while nearly equal numbers of Iraqis say the impact of the Syrian refugees on their national economy has been negative or has had no impact at all.

7. **There is near universal concern with the threat posed by ISIS**, with Turkey, Iran, and Iraq expressing the greatest fears. Egyptians and Arabs in the UAE agree that ISIS poses a threat to the region, but are divided as to whether the group is a threat to their countries. Conversely, Jordanians and Lebanese see ISIS as less of a threat to the region as a whole, but are more concerned by the danger it poses to their own countries. Saudis appear to be the least concerned by the threat from ISIS to the region or to their country.
8. **Only majorities in Turkey, Egypt, and Iraq support the involvement of Western nations in efforts to combat ISIS**. Iranians are divided, while majorities in all other countries are opposed.

#### IV. The Future of Iraq

1. With the exception of Iran and Lebanon, either a strong majority or a plurality of respondents in all other countries say that **the best outcome for Iraq is a strong centralized Iraqi government**. This option is also the one preferred by most Iraqis, regardless of sect. Pluralities in Lebanon and Iran prefer a loose federation of entities in Iraq.
2. Only the Lebanese and those in Saudi Arabia favor independence for the Kurds. Strong majorities everywhere else are opposed.
3. There is **very little confidence in any country surveyed other than Iran that Iraq will be better off in the next five years**.

#### V. How Others See Iran and Its Policies

1. **Iran is seen as playing a mostly negative role by respondents in most countries**. The strongest negative ratings come from Saudi Arabia, the UAE, Egypt, Jordan, and Turkey. Iran also receives mostly negative ratings from Iraqis. Even in Lebanon, where Iran has continually been given higher positive ratings than any other Arab country, Iran's role receives significantly lower scores in the current survey than it did in 2012.
2. Only majorities in Lebanon and Iraq say that their countries have good relations with Iran and affirm that they want relations to improve. In every other country covered in the survey, almost two-thirds or more of all respondents say that their countries have poor relations with Iran. Most express little desire to see relations improve with Iran.
3. **Majorities in every country, except Iraq, say that they believe that Iran has ambitions to produce nuclear weapons**. Iraqis, who in 2012 overwhelmingly believed that Iran intended

to produce a nuclear weapon, are now divided on the question. In 2012, Lebanon was the only country believing that Iran's program was peaceful. They no longer believe that to be true. At the same time, with the exception of Lebanon and Iraq, the percentage of respondents who believe that Iran's intent is peaceful has increased, by as much as 20 points in most countries.

4. Almost two-thirds or more in five of the seven countries surveyed do not believe that Iran's President Hassan Rouhani has led Iran to play a more positive role in the region. Those in Saudi Arabia are more divided, though a plurality still gives a negative assessment to his role. Two-thirds of Lebanese believe Rouhani has moved the country in a more positive direction.
5. **In none of the countries surveyed do respondents hold any hope that the negotiations between the United States and Iran will succeed.** In five of the seven surveyed, almost two-thirds feel the talks will fail.

## VI. How Iranians View Their Country and Its Policies

1. There has been little change in Iranian attitudes about developments in their country. Only about one-third feel the situation today is better than it was five years ago, with slightly more than that retaining some hope for positive change in the future.
2. Despite the absence of significant accomplishments in his domestic or foreign policy agendas, **President Hassan Rouhani appears to retain the support of one-half of the electorate.** When we polled Iranians one year ago, confidence in the new president's commitment to address a series of pressing concerns was slightly above 50%. Today, when respondents were asked to rate Rouhani's job performance, we find his positive numbers remain just over 50%, reflecting the fact that Iranians remain divided in their attitudes toward the president. The only area where Rouhani receives a slightly higher score is in the perception that he has improved ties with the Arab World (56%-42%). The two areas where he receives his lowest ratings are in advancing women's rights and expanding employment opportunities.
3. One year ago, the Iranian public appeared to be only mildly supportive of their government's foreign policy engagements. Today, however, they appear to have fallen in line, especially embracing the government's involvements in Syria and Iraq. **Almost nine in 10 support the regime of Bashar al Assad in Syria.**
4. While a majority of respondents in almost every other country covered in this survey favors a strong central government in Iraq (the option supported by Iraqis), Iranians do not. Instead, they favor a loose federation or an Iraq divided into three parts. Interestingly, Iranians are the only respondents who hold out some hope that the situation in Iraq might improve in the next five years.
5. Only Iranians give Russia a positive rating for its involvement in Syria and Middle East.



6. In the past year, the **Iranian public's support for their country's right to possess nuclear weapons has increased** from 68% to 87%, while the percentage of those opposed has dropped from 29% in 2013 to only 14% in 2014. But while support for nuclear weapons has increased, there has been a significant decrease in the percentage of Iranians who agree that advancing their country's nuclear program is worth the price they pay because of sanctions.

## VII. Impact of Other Countries on the Peace and Stability of the Arab World

1. Across the board, the **United States, followed by Russia, China, and Iran, receive the poorest scores** with overwhelming majorities believing that all these countries have a negative impact on the region. Russia receives its only positive score from Iranians. China's only positive rating comes from Egyptians. Iran is viewed favorably only by Lebanese.
2. **The United States**, which had seen its numbers spike upward in 2012 (in Saudi Arabia, the UAE, Jordan, Egypt, and Lebanon), **suffered a precipitous decline in the perception of its role in 2014. Iran has also suffered a decline in several countries**, most notably in Lebanon, Egypt, and Iraq.
3. **Turkey fares better than most others.** Interestingly, Turks themselves rate their own country's impact in the Middle East as 28 points more negative in 2014.
4. Saudi Arabia's impact is seen as positive by Egyptians and Arabs in the Emirates, but its role is seen as negative in every other country. And Qatar is seen as playing only a somewhat positive role by those in Saudi Arabia and the Lebanese.

## VIII. Concern with Christians and Other Non-Muslim Minorities. And Concern with the Rise of Sectarian Division

1. **In five of the eight countries, majorities say that they are concerned with the situation of Christians and other non-Muslim minorities in the Arab World**—with the greatest concern coming from all segments of the Lebanese and Egyptians.
2. **In every country other than the UAE, two-thirds or more of all respondents are concerned with the growth of sectarian divisions in the Arab World.** Arabs in the UAE are divided on this question. However, when compared with results from a similar poll conducted in 2012 in all countries, **there is a noticeable decline in the percentage of respondents who express concern with the growth of sectarian divisions in the region.** This is most notable in the UAE and Turkey, and surprisingly in Lebanon and Iraq—where the decline has been significant. **Majorities in six of the eight countries surveyed feel that the conflict in Syria has contributed to an increase in sectarian tensions and radicalization in their country.**
3. Even with this decline in concern, **there remains a deep divide in attitudes expressed by Sunni and Shia Muslims in all countries** (Lebanon, Saudi Arabia, UAE, Iraq, Iran, and

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Turkey). Most notable differences occur in response to questions regarding: Iran's and Saudi Arabia's roles in Syria (Shia Muslims seeing Iran playing a positive role, with Sunni Muslims seeing Saudi as having a more positive impact); and the best and worst outcomes for Syria (Shia expressing support for the Assad regime, while Sunni Muslims support the Syrian opposition).

4. **There are, however, significant areas where the views of Sunni and Shia converge.** Both groups agree that the fragmentation of Syria into sect or ethnic regions would be a bad outcome for the country. And both agree that the conflict in Syria has fueled a dangerous increase in sectarianism in the region.

# I. Arab Spring

## A. Impact on the Arab World and My Country

**Table 1. In your view, is the Arab World “better off” or “worse off” following the Arab Spring or is it too early to tell?\***

	Lebanon		Jordan		Egypt		KSA		UAE		Iraq	Turkey
	2011	2014	2011	2014	2011	2014	2011	2014	2011	2014	2014	2014
Better off	39	34	31	14	39	30	40	39	65	<b>53</b>	16	13
Worse off	24	<b>34</b>	14	<b>43</b>	12	<b>43</b>	9	<b>38</b>	15	29	32	38
Too early	29	30	40	40	45	22	48	9	4	14	<b>47</b>	<b>46</b>

\*In 2011, the question was worded: “In your view, is the Arab world better off or worse off following the uprisings that occurred in Tunisia and Egypt and have since spread elsewhere in the region?”

In all five Arab countries surveyed in both 2011 and 2014 about the impact of the Arab Spring on the Arab World, the percentage of those who say the region is better off has declined, while the percentage of those who say the region is worse off has increased. Arabs in the Emirates remain the most positive, with a majority (53%) saying the Arab World is better off following the Arab Spring, while 29% say it is worse off. In Lebanon and Saudi Arabia, opinion on the impact of the Arab Spring on the region are evenly split between those who say it is better off and those who say it is worse off (34%-34% and 39%-38%, respectively).

However, respondents in Jordan and Egypt have the most significant negative assessment of the regional situation, with 43% in each saying the Arab World is worse off; 14% and 30%, respectively, feel the region is better off. Those surveyed in Iraq and Turkey also lean toward a negative view of the Arab Spring, with two to three times as many respondents saying the Arab World is worse off than better off (Iraq: 16% better vs. 32% worse; Turkey: 13% better vs. 38% worse).

In several countries surveyed, sizable percentages of respondents are reserving judgment saying it is still too early to tell (Iraq: 47%, Turkey: 46%, Jordan: 40%).

**Table 2. As a result of the Arab uprisings that began in Tunisia and Egypt, the situation in my country has gotten ....**

	Lebanon		Jordan		Egypt		KSA		UAE		Iraq	Turkey
	2011	2014	2011	2014	2011	2014	2011	2014	2011	2014	2014	2014
Better	28	31	18	31	47	30	47	30	46	<b>59</b>	25	26
Worse	28	<b>34</b>	25	15	16	29	4	19	13	23	<b>41</b>	22
It has had no impact	28	31	58	<b>47</b>	35	29	46	<b>45</b>	20	12	28	<b>40</b>

N.B. In all tables, please note that percentages in the columns may not add up to 100% because of rounding and because responses of “not sure” are not included. Also note that the survey’s samples in Saudi Arabia and the United Arab Emirates include both citizens and residents. See the demographics table on page 35 for more details.

When asked about how their own country has been impacted post-Tunisia and Egypt, the responses are mixed. Again, Arabs in the Emirates are the most positive, with a majority (59%) saying the situation in their country is better, up from 46% who felt positively in 2011. Jordanians are also more positive today than they were in 2011 (31% say “better” in current poll vs. 18% in 2011), though 47% say the Arab uprisings have not had an impact on their country. On the other hand, in Saudi Arabia and Egypt, the percentages of those who say the situation in their country has gotten better dropped precipitously (from 47% in 2011 to 30% in 2014 in both countries). In Lebanon, attitudes remain ambivalent, with almost equal thirds saying “better,” “worse,” and “no impact.” Only one-quarter of respondents in Iraq (25%) and Turkey (26%) feel the Arab Spring has made the situation in their countries better, though Iraqis are more likely than Turks to feel it has made things worse (41% vs. 22%).

## B. Assessments of Arab Spring Countries

<b>Table 3. Is each of the following countries “better off” or “worse off” than it was before the Arab Spring, or is it “too early to tell”?</b>								
		<b>Lebanon</b>	<b>Jordan</b>	<b>Egypt</b>	<b>KSA</b>	<b>UAE</b>	<b>Iraq</b>	<b>Turkey</b>
Egypt	Better off	29	25	42	38	<b>60</b>	19	23
	Worse off	36	35	37	44	28	37	50
	Too early to tell	31	36	18	15	9	37	23
Tunisia	Better off	31	27	38	<b>82</b>	<b>82</b>	23	<b>46</b>
	Worse off	38	42	35	6	11	47	22
	Too early to tell	28	27	25	8	4	24	19
Libya	Better off	32	26	5	14	12	18	27
	Worse off	37	37	<b>82</b>	<b>73</b>	<b>81</b>	40	36
	Too early to tell	28	33	11	9	4	36	29
Yemen	Better off	33	47	9	39	39	48	28
	Worse off	38	25	50	28	27	26	47
	Too early to tell	26	22	35	27	29	19	19

Once again, when asked if individual countries are better or worse off than before the Arab Spring, respondents’ attitudes are ambivalent. Only Tunisia is seen as a significant success story in three of the seven countries surveyed (Saudi Arabia: 82%, UAE: 82%, Turkey: 46%). Opinion is split in Egypt (38% better off vs. 35% worse off), and leans negatively in Lebanon (31% vs. 38%), Jordan (27% vs. 42%), and Iraq (23% vs. 47%).

Interestingly, Yemen is considered better off by almost half of the respondents in Jordan (47%) and Iraq (48%) and by pluralities in Saudi Arabia (39%) and UAE (39%). (It should be noted that more than half of this survey took place before Houthi rebels overran Sanaa, unsettling the arrangement that had been in place for the past few years.) Lebanese respondents are split on Yemen since the Arab Spring, with 33% saying the country is better off and 38% saying it is worse off. Those in

Turkey and Egypt, however, have a decidedly more negative assessment, with about half in both countries saying Yemen is worse off (47% and 50%, respectively).

Egypt is viewed as much better off only in the UAE (60%), which has invested heavily in the success of the new government of President Sisi. Egyptians themselves hold a more tempered view, with 42% saying they are better off and 38% saying they are worse off. Pluralities in the other countries surveyed feel that Egypt is worse off (Turkey: 50%, Saudi Arabia: 44%, Iraq: 37%, Lebanon: 36%, Jordan: 35%).

Libya is consistently seen as worse off than before the Arab Spring, with the strongest negative opinions in Egypt (82%), UAE (81%), and Saudi Arabia (73%), and by at least a plurality in all other countries surveyed (Iraq: 40%, Lebanon: 37%, Jordan 37%, Turkey: 36%).

## C. Projections for Success in the Next Five Years

<b>Table 4. In your opinion, will each of the following countries be “better off” or “worse off” in five years?</b>								
		<b>Lebanon</b>	<b>Jordan</b>	<b>Egypt</b>	<b>KSA</b>	<b>UAE</b>	<b>Iraq</b>	<b>Turkey</b>
Egypt	Better off	37	17	<b>47</b>	<b>69</b>	<b>66</b>	10	24
	Worse off	31	36	35	16	25	34	49
	About the same	28	43	14	13	7	52	24
Tunisia	Better off	30	30	<b>59</b>	<b>79</b>	<b>80</b>	29	<b>54</b>
	Worse off	38	30	15	7	12	26	29
	About the same	27	35	24	10	4	38	11
Libya	Better off	28	21	21	20	25	19	38
	Worse off	<b>44</b>	<b>42</b>	<b>57</b>	<b>65</b>	<b>63</b>	39	35
	About the same	25	31	20	12	8	36	22
Syria	Better off	28	14	19	4	4	12	16
	Worse off	<b>46</b>	<b>50</b>	<b>62</b>	<b>74</b>	<b>79</b>	<b>47</b>	<b>64</b>
	About the same	23	32	17	17	13	36	16
Yemen	Better off	33	34	30	34	41	37	23
	Worse off	28	29	28	27	18	29	51
	About the same	35	31	38	29	35	28	17

Here again, Tunisia leads the way, with majorities of respondents in four of the seven countries surveyed saying that Tunisia will be better off in five years. Respondents in the UAE (80%) and Saudi Arabia (79%) are the most optimistic about Tunisia’s future, followed by Egypt (59%) and Turkey (54%). There is considerably more ambivalence in Lebanon (30% better off vs. 38% worse off), Jordan (30% vs. 30%), and Iraq (29% vs. 26%).

Prospects for success in Egypt are rated high in three of the surveyed countries, with respondents in Saudi Arabia (69%) and UAE (66%) expressing the greatest optimism. Almost half of Egyptians also have hope in a better future (47%), while one-third are more pessimistic (35%). The Lebanese

lean toward optimism (37% vs. 31%), but less than one-quarter of respondents in Turkey (24%), Jordan (17%), and Iraq (10%) are confident in improvement in Egypt in the next five years.

Attitudes toward Yemen's future are generally ambivalent, with opinion split in Lebanon, Jordan, Egypt, Saudi Arabia, and Iraq. Arabs in the Emirates are more hopeful (41% say better off), while a majority of respondents in Turkey (51%) say Yemen will be worse off in five years.

Respondents in the seven countries surveyed give Syria and Libya little chance for progress in the next five years. About half of those in Lebanon (46%), Iraq (47%), and Jordan (50%) think Syria will be worse off in five years, with even greater pessimism expressed by those in Egypt (62%), Turkey (64%), Saudi Arabia (74%), and the UAE (79%). With respect to Libya, majorities in Saudi Arabia (65%), the UAE (63%), and Egypt (57%) think it will be worse off, with concurrence from pluralities in Lebanon (44%), Jordan (42%), and Iraq (39%). Only in Turkey is opinion on Libya's future more evenly divided (38% vs. 35%).



## II. The Role of the Muslim Brotherhood

**Table 5. Has the role of the Muslim Brotherhood been positive or negative in each of the following countries?**

		Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey
Egypt	Positive	24	<b>42</b>	<b>43</b>	<b>53</b>	22	32	<b>51</b>
	Negative	<b>51</b>	34	44	27	<b>68</b>	39	33
	No impact	21	22	11	12	2	26	10
Tunisia	Positive	39	37	<b>48</b>	<b>55</b>	25	31	<b>55</b>
	Negative	38	31	31	29	<b>68</b>	21	28
	No impact	19	19	17	7	3	31	11
Your country	Positive	15	30		20	18	29	<b>53</b>
	Negative	<b>45</b>	36		8	38	28	32
	No impact	36	24		<b>71</b>	37	28	10

Only in Saudi Arabia and Turkey do majorities feel that the Muslim Brotherhood has played a positive role in Egypt and Tunisia. A majority of respondents in Turkey (53%) also feel that the Brotherhood has been positive in their country. Only one in five respondents in Saudi Arabia thinks the Brotherhood's role in the Kingdom has been positive; 71% say it has had no impact there.

Attitudes in Jordan also lean positive with respect to the Muslim Brotherhood's role in Egypt (42% vs. 34% negative) and Tunisia (37% vs. 31% negative). These same respondents lean in the other direction with respect to its role in their own country (30% vs. 36%).

Two-thirds of respondents in the UAE say the Brotherhood's role in both countries has been negative (68% in both). While Arabs in the Emirates do not feel it has played a positive role in their own country (only 18% say so), they are evenly split between labelling the Brotherhood a negative force (39%) or its playing no role at all (37%) in the UAE.

In the three other countries surveyed, opinion is mixed. In Lebanon, respondents are evenly split about its role in Tunisia (39% vs. 38%), but are twice as likely to say it has been a negative force in Egypt as to say it is a positive one (24% positive vs. 51% negative). In Iraq, respondents lean toward a negative assessment with respect to Egypt (32% vs. 39%), a positive assessment with respect to Tunisia (31% vs. 21%), and an even split with respect to their own country (29% vs. 28%).

Interestingly, in Egypt, attitudes are divided with positive and negative attitudes toward the Muslim Brotherhood's role there nearly even (43% vs. 44%). This reflects an increase in support for the role of the Brotherhood continuing the trend we have observed in Egypt since the 2013 crackdown on the group. With respect to Tunisia, Egyptians lean toward assessing the Muslim Brotherhood's role as positive (48%) rather than negative (31%).

### III. Syria

#### A. Desired Outcome

**Table 6. In the conflict raging in Syria, whom do you most favor?**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
Government of Bashar al Assad	<b>68</b>	32	18	16	14	44	13	<b>87</b>
The Syrian Opposition Coalition and the Free Syrian Army	25	<b>56</b>	<b>62</b>	<b>49</b>	<b>50</b>	<b>53</b>	23	11
The Islamic Front	5	7	12	8	12	2	<b>24</b>	1
Jabhat Al Nusra	2	4	5	13	11	1	<b>40</b>	1
The Islamic State	1	1	2	2	13	0	0	0
No one	0	0	1	12	0	0	0	0

When asked what outcome they most favored for Syria, about half of the respondents in five of the eight countries say they support victory for the internationally recognized Syrian opposition. This support is strongest in Egypt (62%), followed by Jordan (56%), Iraq (53%), the UAE (50%), and Saudi Arabia (49%). The runner-up in all of these countries is Bashar al Assad, though only in Iraq (44%) and Jordan (32%) does this support rise to significant levels.

The outliers are Iran and Lebanon, where majorities favor the regime of Bashar al Assad (87% and 68%, respectively), and Turkey, where a strong plurality favors victory for Jabhat al Nusra (40%) followed by the Islamic Front (24%).

**Table 6a. Sunni vs. Shia Opinion: Choosing sides in the Syrian conflict**

	Lebanon		KSA		UAE		Iraq		Turkey		Iran	
	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia
Government of Bashar al Assad	38	<b>84</b>	2	<b>58</b>	12	31	20	<b>58</b>	4	<b>74</b>	50	<b>91</b>
The Syrian Opposition Coalition and the Free Syrian Army	38	14	<b>58</b>	24	<b>51</b>	<b>42</b>	<b>75</b>	40	25	6	30	8
The Islamic Front	14	1	9	4	11	14	2	1	<b>26</b>	9	10	<1
Jabhat Al Nusra	8	-	15	7	10	13	2	1	<b>45</b>	11	10	<1
The Islamic State	3	-	3	<1	15	-	<1	<1	-	-	-	-

With regard to the Syrian conflict, there are notable differences of opinion between Sunni and Shia Muslims in each of the six countries surveyed that have significant communities of both sects. Strong majorities of Shia respondents in Iran (91%), Lebanon (84%), Turkey (74%), Iraq (58%), and Saudi Arabia (58%) side with Assad, while his support among Sunni respondents is minimal (e.g., Saudi Arabia: 2%, Turkey: 4%), except in Lebanon (38%) and Iran (50%). On the other hand, majorities of Sunni respondents in Iraq (75%), Saudi Arabia (58%), and the UAE (51%) favor the Syrian opposition.

## B. Worst Outcome

**Table 7. In your opinion, which of the following would be the worst outcome in Syria?**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
Bashar al Assad remains in control of Syria	16	<b>46</b>	<b>42</b>	<b>58</b>	<b>56</b>	33	27	5
The Islamic State or like-minded groups win control of Syria	39	18	24	8	10	26	13	47
Syria fragments into sect- and ethnic-based regions	<b>43</b>	32	30	33	33	<b>37</b>	<b>46</b>	<b>44</b>
Not sure	3	4	4	1	1	3	14	3

When asked what would constitute the worst possible outcome in Syria, majorities in Saudi Arabia (58%) and the UAE (56%) say Assad remaining in power, as do pluralities in Jordan (46%) and Egypt (42%). About a third of respondents in these four countries say the worst outcome would be the fragmentation of Syria into sect- or ethnic-based entities. This fear of a divided Syria is considered the worst outcome by pluralities in Turkey (46%) and Iraq (37%), though an Assad regime is also feared by 33% in Iraq and 27% in Turkey. Among respondents in Lebanon and Iran opinion is basically split on the worst outcome between “extremist groups win control of Syria” (39% and 47%, respectively) and fragmentation by sect or ethnicity (43% and 44%, respectively).

**Table 7a. Sunni vs. Shia Opinion: The worst outcome in Syria**

	Lebanon		KSA		UAE		Iraq		Turkey		Iran	
	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia
Bashar al Assad remains in control of Syria	31	6	<b>68</b>	26	<b>58</b>	36	<b>57</b>	20	30	8	20	3
The Islamic State or like-minded groups win control of Syria	25	47	7	14	10	14	17	32	10	30	28	49
Syria fragments into sect- and ethnic-based regions	<b>42</b>	<b>45</b>	24	<b>59</b>	31	<b>49</b>	24	<b>44</b>	<b>45</b>	<b>53</b>	<b>46</b>	<b>44</b>

Again, we find a difference of opinion between Sunni and Shia on the worst possible outcome in Syria. Sunni respondents are far more likely than Shia respondents to choose Assad’s remaining in power as the worst outcome; this option was selected by majorities of Sunnis in Saudi Arabia (68%), the UAE (58%), and Iraq (57%).

Of note, however, is the real concern both Sunni and Shia have regarding the possible fragmentation of Syria. We find similar levels of unease in both communities in Iran (46% of Sunni vs. 44% of Shia), Lebanon (42% Sunni vs. 45% Shia), and Turkey (45% Sunni vs. 53% Shia). It is the top choice for Shia respondents in Saudi Arabia (59%), the UAE (49%), and Iraq (44%), and the second choice (behind Assad’s continuing rule) for Sunni respondents in these three countries (24%, 31%, 24%, respectively).

## C. A Negotiated Solution

**Table 8. Is it still possible to find a negotiated solution to the conflict in Syria which includes the participation of both the Assad government and the Syrian Opposition?**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
Yes	25	25	42	<b>61</b>	35	23	31	42
No	<b>44</b>	<b>51</b>	<b>54</b>	32	<b>62</b>	<b>64</b>	<b>63</b>	<b>53</b>
Not sure	31	23	4	7	3	13	6	5

Only in Saudi Arabia is there much hope that a negotiated solution is still possible for Syria, with 61% saying it is possibility. Majorities in almost all of the other countries surveyed say it is not possible, with the strongest negative views in Iraq (64%), Turkey (63%), and the UAE (62%). A plurality of respondents in Lebanon (44%) also think a negotiated solution is not possible; about one-third of Lebanese respondents express uncertainty on this question.

## D. Impact of Other Countries on Syria

**Table 9. In your opinion, what impact has each of the following had on Syria?**

		Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
United States	Positive	7	10	15	9	9	8	6	6
	Negative	<b>57</b>	<b>52</b>	<b>63</b>	<b>83</b>	<b>79</b>	<b>51</b>	<b>78</b>	44
	No impact	30	30	21	7	11	31	15	<b>47</b>
	Not sure	6	8	1	2	2	9	1	3
Russia	Positive	32	18	30	25	45	18	16	<b>55</b>
	Negative	28	42	40	<b>59</b>	38	39	<b>60</b>	15
	No impact	36	35	28	11	15	39	23	25
	Not sure	5	5	2	5	3	4	2	5
Turkey	Positive	37	<b>51</b>	31	<b>59</b>	39	<b>64</b>	<b>68</b>	27
	Negative	30	29	42	19	37	12	18	41
	No impact	27	17	26	19	20	23	10	28
	Not sure	6	2	1	3	4	1	4	4
Iran	Positive	44	19	11	15	12	35	18	77
	Negative	27	<b>56</b>	<b>58</b>	<b>73</b>	<b>55</b>	42	<b>50</b>	4
	No impact	23	15	30	5	27	14	25	15
	Not sure	6	10	1	7	6	9	7	4
KSA	Positive	22	20	<b>50</b>	<b>70</b>	<b>56</b>	31	21	12
	Negative	36	35	21	12	12	34	27	<b>62</b>
	No impact	36	42	28	14	29	33	47	22
	Not sure	5	3	1	3	3	2	5	4
Qatar	Positive	20	32	21	38	29	29	31	12
	Negative	<b>49</b>	34	<b>48</b>	29	42	24	18	<b>59</b>
	No impact	26	31	30	28	24	28	49	26
	Not sure	6	3	2	5	5	19	3	3

Respondents in the eight countries surveyed were asked about the impact of the United States, Russia, Turkey, Iran, Saudi Arabia, and Qatar on Syria. While the assessments are generally negative, each country surveyed identifies one country as having a predominantly positive impact on Syria. For Lebanon, it is Iran; for Jordan, Saudi Arabia, and Iraq, it is Turkey; for Egypt and the UAE, it is Saudi Arabia; and for Iran, it is Russia. (Turkey's respondents only find their own country to be having a positive impact on Syria.)

Overall, the United States receives the poorest scores, being rated negatively in every country covered in the poll. Interestingly, Iran is the only country surveyed where the United States does not earn a negative rating from a majority of respondents (44%), though almost one-half of Iranians (48%) say the United States has no impact on Syria. (Note: This poll was conducted largely before the bombing of ISIS targets in Syria.) The strongest negative opinions of the U.S. impact on Syria come from respondents in Saudi Arabia (83%), the UAE (79%), and Turkey (78%).

Iran is viewed as having a negative impact on Syria by every other country surveyed except Lebanon. Majorities in Saudi Arabia (73%), Egypt (58%), Jordan (56%), the UAE (55%), and Turkey (50%), as well as a plurality in Iraq (42%), rate it negatively. Among the Lebanese, 44% say Iran's impact in Syria has been positive, while 27% say it has been negative.

Opinion about Russia's impact on Syria is, as noted above, seen as positive by a majority of respondents in Iran (55%), as well as by a plurality of Arabs in the UAE (45%) and the Lebanese (32%). The other five countries view Russia negatively in this regard, with the strongest negative ratings coming from respondents in Turkey (60%) and Saudi Arabia (59%).

Turkey's impact on Syria receives mixed reviews from the survey's respondents. Majorities in Iraq (64%), Saudi Arabia (59%), and Jordan (51%) say Turkey has been a positive force in Syria, with a plurality in Lebanon agreeing (37%). Opinion in the UAE is split (39% positive vs. 37% negative). However, among those in Egypt and Iran more than four in 10 view Turkey's impact as negative.

Saudi Arabia's impact on Syria is viewed positively by majorities in Egypt (50%) and the UAE (56%), and largely negatively by those in Iran (62%). In the other four countries, opinion leans negative; however, sizable percentages of respondents in Turkey (47%), Jordan (42%), Lebanon (36%), and Iraq (33%) think the Kingdom has had no impact on Syria.

Finally, in terms of its impact on Syria, Qatar fares poorly among respondents in Lebanon (49% negative), Egypt (48%), the UAE (42%), and particularly Iran (59%), while registering only mildly positive scores in Saudi Arabia, Iraq, and Turkey, and an even split in Jordan.

**Table 9a. Sunni vs. Shia Opinion: The roles of Iran and Saudi Arabia in Syria**

		Lebanon		KSA		UAE		Iraq		Turkey		Iran	
		Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia
The role of Iran in Syria	Positive	26	<b>58</b>	1	<b>58</b>	2	<b>83</b>	16	<b>46</b>	10	<b>76</b>	<b>51</b>	<b>81</b>
	Negative	<b>47</b>	15	<b>86</b>	34	<b>62</b>	8	<b>63</b>	30	<b>55</b>	14	23	2
	No impact	22	23	6	5	30	7	8	18	28	8	24	14
The role of Saudi Arabia in Syria	Positive	39	12	<b>79</b>	43	<b>60</b>	33	36	28	22	17	21	11
	Negative	22	<b>42</b>	<1	<b>47</b>	10	21	26	38	28	21	<b>64</b>	<b>62</b>
	No impact	35	38	16	9	27	42	35	32	47	47	12	23

When asked about the roles of Iran and Saudi Arabia in Syria, Sunni respondents are far more likely to say Iran's role is negative and Saudi Arabia's role is positive, while Shia respondents are more likely to say the opposite—that Iran plays a positive role while Saudi Arabia plays a negative one.

Shia respondents in the UAE (83%), Iran (81%), Turkey (76%), Saudi Arabia (58%), Lebanon (58%), and Iraq (46%) predominantly view Iran's role in Syria as positive, while their Sunni counterparts in five of the six countries (all except Iran itself) see Iran as a negative factor in Syria.

With respect to Saudi Arabia's role, at least pluralities of Sunni respondents in the UAE (60%), Lebanon (39%), and Iraq (36%), as well as in Saudi Arabia itself (79%), see the Kingdom's role as positive, while Shia respondents in Saudi Arabia (47%), Lebanon (42%), and Iraq (38%) are most likely to say the Kingdom's role in Syria is negative. There are two exceptions to this pattern: Half of Turks, both Sunni and Shia, think Saudi Arabia does not have a significant impact on Syria. And more than six in 10 Iranians, regardless of sect, say the Kingdom's role in Syria is negative.

## E. Impact of Syrian Conflict on Your Country

**Table 10. Has the conflict in Syria contributed to an increase of sectarian tensions and radicalization in your country?**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
Yes	<b>70</b>	<b>69</b>	44	<b>79</b>	<b>60</b>	<b>63</b>	34	<b>51</b>
No	21	26	<b>53</b>	14	38	34	<b>59</b>	45

Majorities in six of the eight countries surveyed feel that the conflict in Syria has contributed to an increase in sectarian tensions and radicalization in their country. This opinion is most pervasive in Saudi Arabia (79%), Lebanon (70%), and Jordan (69%), followed by Iraq (63%), the UAE (60%),



and Iran (51%). Among respondents in Turkey and Egypt, however, majorities say that the Syrian conflict has not furthered sectarian division in their countries (59% and 53%, respectively).

**Table 10a. Sunni vs. Shia Opinion: Syrian conflict increasing sectarian tensions in your country**

	Lebanon		KSA		UAE		Iraq		Turkey		Iran	
	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia	Sunni	Shia
Yes	<b>71</b>	<b>71</b>	<b>80</b>	<b>77</b>	<b>60</b>	<b>60</b>	<b>72</b>	<b>58</b>	33	40	<b>56</b>	<b>50</b>
No	20	19	14	14	38	40	26	38	<b>61</b>	<b>47</b>	39	46

On this question, in five of the six countries, we find agreement among Sunni and Shia respondents that the conflict in Syria has fueled a dangerous increase in sectarianism in their country. In the one exception, Turkey, respondents are more likely to say that the Syrian conflict has not contributed to an increase in sectarian tensions in their country, and this tendency is shared by both Sunni and Shia respondents.

## F. Impact of Refugees

**Table 11. What is the impact of Syrian refugees coming into your country ...**

		Lebanon	Jordan	Iraq	Turkey
on your country's security?	Positive	14	16	6	4
	Negative	<b>55</b>	<b>61</b>	<b>50</b>	39
	No impact	24	18	37	<b>56</b>
on your country's economy?	Positive	32	16	10	9
	Negative	36	<b>58</b>	40	<b>56</b>
	No impact	26	22	<b>43</b>	30

Majorities in Lebanon (55%), Jordan (61%), and Iraq (50%), say that the influx of Syrian refugees has had a negative impact on their countries' security, while a majority of Turks (56%) say the refugees have had no impact on security in Turkey.

Respondents in Jordan and Turkey hold the strongest opinions about the impact of these refugees on their national economies, with 58% of Jordanians and 56% of Turks saying the impact has been negative. Lebanese have mixed views on this subject (32% positive vs. 36% negative), while among Iraqis only 10% say the impact of the Syrian refugees on their economy has been positive and nearly equal numbers say it has been negative (40%) or has not been an impact at all (43%).

## G. Impact of ISIS

**Table 12. Does ISIS (now calling itself “Islamic State”) pose a threat...**

		Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
to the region?	Very grave threat	39	33	42	36	<b>55</b>	<b>48</b>	<b>55</b>	<b>53</b>
	Somewhat of a threat	45	27	22	48	28	16	35	32
	No threat at all	9	35	24	13	14	16	7	12
to your country?	Very grave threat	<b>50</b>	42	32	23	41	<b>53</b>	<b>47</b>	<b>63</b>
	Somewhat of a threat	34	16	30	54	40	14	29	23
	No threat at all	11	35	26	20	16	23	16	11

Respondents in all eight countries surveyed were asked if ISIS, also known as Islamic State, poses a threat to the region and to their own countries. Respondents in Iran, Turkey, and Iraq say that ISIS poses the greatest threat to both. Majorities in Iran say ISIS is a very grave threat to the region (53%) and their country (63%). Respondents in Turkey and Iraq also assess ISIS as a very grave threat to the region (55% and 48%, respectively) and their countries (47% and 53%, respectively).

Egyptians and Arabs in the UAE feel that ISIS poses a grave threat to the region (42% and 55%, respectively), but are divided as to whether the group is a threat to their countries. In Egypt, 32% say ISIS is a grave threat to their country, while 30% feel it is only somewhat of a threat. In the UAE, 41% label ISIS a grave threat to their country, and 40% say it is somewhat of a threat.

Conversely, Jordanians and Lebanese see ISIS as less of a threat to the region as a whole, but are more concerned by the danger it poses to their own countries. In Jordan, ISIS is considered by 33% to be a grave threat to the region and by 42% to be a grave threat to their country. In Lebanon, ISIS is identified as a grave threat to the region by 39% and to their country by 50%.

Those in Saudi Arabia appear to be the least concerned by the threat from ISIS to the region or their country, with about half of the respondents saying ISIS is somewhat of a threat to the region (48%) and their country (54%), while only 36% say it poses a grave threat to the region and 23% a grave threat to the Kingdom.

**Table 13. Do you support direct Western-led military intervention to combat ISIS?**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
Yes	40	29	<b>59</b>	26	40	<b>51</b>	<b>84</b>	<b>47</b>
No	<b>51</b>	<b>63</b>	34	<b>65</b>	<b>58</b>	43	8	44

**Turkey stands out for its support of direct Western-led military intervention to combat ISIS, with 84% of respondents saying they support such an effort.** Majorities in Egypt (59%) and Iraq (51%) agree, while Iranians are split on this question (47% vs. 44%). On the other hand, Western military intervention is opposed by majorities in Lebanon (51%), the UAE (58%), Jordan (63%), and Saudi Arabia (65%).

## IV. The Future of Iraq

### A. Desired Outcome

**Table 14. Which of the following outcomes do you feel represents the best future for Iraq?**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
Partition into three separate countries	20	16	7	9	3	18	8	31
A loose federation of regions	40	37	9	32	34	29	21	41
A strongly centralized country	34	<b>45</b>	<b>81</b>	<b>57</b>	<b>59</b>	<b>49</b>	<b>69</b>	24
Not sure	6	2	2	2	4	5	2	4

With the exception of those in Iran and Lebanon, respondents are most likely to say that the best outcome for Iraq is a strong centralized Iraqi government. The strongest support for a centralized government comes from Egypt (81%), Turkey (69%), the UAE (59%), and Saudi Arabia (57%). This option is also the one most preferred by Iraqis (49%). Pluralities in Lebanon (40%) and Iran (41%) prefer a loose federation of regions as the best future for the Iraqi state. Partition into three separate countries is the least preferred option in all countries surveyed, except Iran (31%).

### B. An Independent Kurdistan?

**Table 15. How supportive are you of an independent State of Kurdistan in Iraq?**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
Support	<b>56</b>	30	12	<b>53</b>	22	30	13	46
Oppose	44	<b>70</b>	<b>88</b>	47	<b>79</b>	<b>70</b>	<b>87</b>	<b>55</b>

*Note: Support is an aggregation of the responses "very supportive" and "somewhat supportive." Oppose is an aggregation of the responses "somewhat opposed" and "very opposed."*

When asked how supportive they are of an independent state of Kurdistan in Iraq, only in Lebanon (56%) and Saudi Arabia (53%) do a majority of respondents favor independence for the Kurds. Strong majorities everywhere else are opposed, with the most intense opposition from Egyptians (88%), Turks (87%), and Arabs in the UAE (79%).

## C. Iraq's Future

**Table 16. In your opinion, will Iraq be "better off" or "worse off" in five years?**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
Better off	31	25	17	19	29	20	18	<b>44</b>
Worse off	35	<b>46</b>	36	<b>46</b>	33	<b>48</b>	37	31
About the same	29	28	41	26	31	27	40	20
Not sure	5	1	7	9	7	5	5	4

Fewer than one-third of respondents in all the countries surveyed, except Iran, are optimistic that Iraq will be better off in five years; among Iranians, a plurality (44%) hold this view. Pessimism is highest in Iraq itself (48% say "worse off"), Saudi Arabia (46%), and Jordan (46%).

## V. How Others See Iran and Its Policies

### A. Iran's Role in Other Countries: 2012–2014

Table 17. Does Iran play a positive or negative role in each of these Arab countries?															
		Lebanon		Jordan		Egypt		KSA		UAE		Turkey		Iraq	
		2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014
Syria	Positive	72	<b>44</b>	13	20	12	11	9	17	24	13	9	16	54	35
	Negative	19	28	80	<b>55</b>	67	<b>56</b>	81	<b>68</b>	69	<b>55</b>	67	<b>52</b>	33	<b>43</b>
Lebanon	Positive	85	<b>74</b>	47	37	21	13	13	13	27	15	13	10	67	<b>45</b>
	Negative	14	21	48	<b>58</b>	51	<b>43</b>	80	<b>72</b>	61	<b>57</b>	53	<b>47</b>	25	38
Iraq	Positive	75	<b>41</b>	19	13	18	7	14	9	20	12	12	9	64	44
	Negative	19	34	64	<b>69</b>	62	61	74	<b>76</b>	67	<b>61</b>	62	<b>56</b>	30	<b>47</b>
Bahrain	Positive	70	33	12	14	20	9	18	12	18	10	16	7	56	34
	Negative	22	27	71	<b>60</b>	52	35	68	<b>71</b>	68	<b>43</b>	58	<b>52</b>	31	<b>42</b>
Yemen*	Positive	67	24	11	13	3	9	12	14	16	7	8	5	62	32
	Negative	17	25	80	<b>58</b>	57	36	70	<b>45</b>	71	<b>44</b>	61	<b>51</b>	29	<b>45</b>

\* in 2012, "Arab Gulf region"

Respondents were asked if Iran plays a positive or negative role in five Arab countries; this question was also asked of respondents in a survey conducted in September-October 2012. Overall, **Iran is seen as playing a mostly negative role by most respondents in most countries.**

The strongest negative ratings come from Saudi Arabia, the UAE, Egypt, Jordan, and Turkey. At most one in five of these respondents says Iran plays a positive role in any of the countries, with one exception (37% of Jordanians say Iran plays a positive role in Lebanon). Negative ratings for Iran average 66% in Saudi Arabia, 60% from Jordanians, 52% from Arabs in the UAE, 51% from Turks, and 46% from Egyptians.

The responses of Iraqis are mixed, with more than 40% of respondents assessing Iran's role as negative in each of the five countries except in the case of Lebanon where 45% of Iraqis say Iran plays a positive role and 38% say negative. **Note that the plurality of Iraqis who now say Iran plays a negative role in Iraq represents a significant shift since 2012.**

Lebanese respondents are the most positive about Iran's role, particularly in Lebanon itself (74% positive vs. 21% negative) and in Syria (44% vs. 28%), with more mixed assessments about Iran's role in Iraq (41% vs. 34%), Bahrain (33% vs. 27%), and Yemen (24% vs. 25%).

In comparison to the 2012 responses, Iran's positive ratings have decreased in this current survey, most noticeably in the assessments of Iraqi and Lebanese respondents. In 2012, a majority of Iraqis said Iran played a positive role in each of the five countries, while the 2014 numbers are 20 to 30 points lower. Though the assessment of Lebanese respondents regarding Iran's role in their own

country only dropped by 11 points (from 85% positive to 74%), their ratings dropped by 30 to 40 points with respect to Iran's role elsewhere (e.g., in Iraq from 75% positive to 41%).

**Table 18. During the presidency of Hassan Rouhani, Iran's behavior in the region has moved in a more positive direction.**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey
Agree	<b>68</b>	21	33	39	27	32	24
Disagree	29	<b>75</b>	<b>65</b>	47	<b>65</b>	<b>64</b>	<b>70</b>

*Note: Agree is an aggregation of the responses "strongly agree" and "somewhat agree." Disagree is an aggregation of the responses "somewhat disagree" and "strongly disagree."*

In five of the seven countries surveyed, more than six in 10 respondents do not feel that President Hassan Rouhani has led Iran to play a more positive role in the region. This sentiment is strongest in Jordan (75%) and Turkey (70%), and is shared by majorities in Egypt, the UAE, and Iraq. Respondents in Saudi Arabia are more divided on this issue, with a plurality (47%) saying Iran has not moved in a more positive direction under Rouhani, while 39% say its behavior has changed for the better. Among Lebanese respondents, however, two-thirds (68%) believe that Rouhani has moved his country in a more positive direction.

## B. Relations with Iran

**Table 19. Are relations between your country and Iran positive or negative?**

	Lebanon		Jordan		Egypt		KSA		UAE		Turkey		Iraq	
	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014
Positive	<b>97</b>	<b>75</b>	11	24	23	27	0	7	39	20	0	32	92	<b>56</b>
Negative	2	19	<b>83</b>	<b>71</b>	74	<b>72</b>	97	<b>90</b>	57	<b>66</b>	95	<b>61</b>	7	41

*Note: Positive is an aggregation of the responses "very positive" and "somewhat positive." Negative is an aggregation of the responses "somewhat negative" and "very negative."*

**Table 20. Should your country have friendlier relations with Iran?**

	Lebanon		Jordan		Egypt		KSA		UAE		Turkey		Iraq	
	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014
Agree	82	<b>75</b>	26	31	40	35	50	33	41	35	21	37	66	<b>55</b>
Disagree	17	21	<b>67</b>	<b>68</b>	59	<b>63</b>	44	<b>49</b>	55	<b>53</b>	74	<b>57</b>	32	41

*Note: Agree is an aggregation of the responses "strongly agree" and "somewhat agree." Disagree is an aggregation of the responses "somewhat disagree" and "strongly disagree."*

Only in Lebanon and Iraq do majorities say that their countries have good relations with Iran (75% and 56% positive, respectively) and affirm that they want relations to improve (75% and 55% agree, respectively). In every other country covered in the survey, at least six in 10 respondents (and often far more) say that their countries have poor relations with Iran, with the highest negative responses from Saudi Arabia (90%), Egypt (72%), and Jordan (71%). Majorities in most of



these countries do not want to have friendlier relations with Iran, with only about one-third of respondents expressing that they do desire improved relations.

In comparison to 2012, there has been a decrease in the percentages of respondents who want friendlier relations in five of the seven countries surveyed, including Saudi Arabia (from 50% to 33%) and Iraq (from 66% to 55%), as well as Lebanon (by 7 points), UAE (by 6), and Egypt (by 5). There has been an uptick in the desire for better relations with Iran in Turkey (from 21% to 37%) and in Jordan (from 26% to 31%).

## C. Iran's Nuclear Program

**Table 21. Which of the following statements comes closest to your views?**

	Lebanon		Jordan		Egypt		KSA		UAE		Turkey		Iraq	
	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014
Iran is pursuing its nuclear program for peaceful purposes.	80	33	11	39	15	26	4	23	17	41	8	30	12	13
Iran has ambitions to produce nuclear weapons.	18	<b>59</b>	87	<b>58</b>	85	<b>69</b>	95	<b>71</b>	78	<b>53</b>	87	<b>62</b>	85	<b>45</b>

Majorities in every country, except Iraq (45%), say that they believe that Iran has ambitions to produce nuclear weapons. This belief is strongest among respondents in Saudi Arabia (71%), Egypt (69%), and Turkey (62%). In every country except Lebanon, however, the percentage of respondents who hold this opinion has dropped by 15-40 points. The decline is most precipitous in Iraq (from 85% in 2012 to 45% in the current survey), followed by Jordan (29 point decline), UAE (-25), Turkey (-25), and Saudi Arabia (-24). Iraqis, who in 2012 overwhelmingly believed that Iran intended to produce a nuclear weapon (85%), are now divided on the question, with 42% of respondents saying they are “not sure.”

At the same time, with the exception of Lebanon and Iraq, the percentages of respondents who believe that Iran's intent is peaceful have increased, dramatically in some countries. For example, in Jordan this view is now held by 39% of respondents, compared to just 11% who held it in 2012. Similar jumps are seen in the UAE (from 17% in 2012 to 41% in 2014) and in Turkey (from 8% in 2012 to 30% in 2014).

Also of note: **In 2012, Lebanon alone believed that Iran's program was peaceful (80%); the current survey finds that this is no longer the case.** The percentage of Lebanese now holding this view dropped 47 points to 33%, while the percentage of Lebanese respondents who now believe Iran wants to build nuclear weapons has more than tripled (from 18% to 59%). This appears to

reflect the general sobering of Lebanese attitudes toward Iran, which are also seen in the decline in the positive assessment that they give to Iran's regional role. (See Table 30, p. 29).

**Table 22. How confident are you that the negotiations between the United States and Iran will succeed in removing the potential threat caused by Iran's nuclear program?**

	<b>Lebanon</b>	<b>Jordan</b>	<b>Egypt</b>	<b>KSA</b>	<b>UAE</b>	<b>Iraq</b>	<b>Turkey</b>
Confident	32	28	45	36	38	20	28
Not confident	<b>64</b>	<b>65</b>	<b>53</b>	<b>61</b>	<b>59</b>	<b>75</b>	<b>68</b>

*Note: Confident is an aggregation of the responses "very confident" and "somewhat confident." Not confident is an aggregation of the responses "not very confident" and "not at all confident."*

A majority in every country surveyed is not confident that the negotiations between the United States and Iran will succeed in removing the potential threat caused by Iran's nuclear program. This lack of confidence is strongest in Iraq (75%), Turkey (68%), Jordan (65%), and Lebanon (64%).

## VI. How Iranians View Their Country and Its Policies

### A. Satisfaction and Optimism

**Table 23. Are you better off/worse off than you were 5 years ago?**

	2013	2014
Better off	36	34
Worse off	43	36
About the same	18	30

In 2013 and again in the current survey, Iranian respondents were asked to assess their current situation compared to five years ago, a measure of satisfaction. We find little change in Iranian attitudes. Only about one-third (34%) feel the situation today is better than it was five years ago, and an equal number say they are worse off (36%), while 30% say there has been no change.

**Table 24. Do you feel you will be better off/worse off during the next 3 years under a Rouhani administration?**

	2013	2014
Better off	43	41
Worse off	27	23
About the same	22	30

*Note: In 2013, the question was asked regarding "the next 4 years under a Rouhani administration."*

When asked to consider if they will be better or worse off during the next few years under a Rouhani administration, a measure of optimism, Iranian respondents appear to retain slightly more hope for positive change in the future than satisfaction with their current situation. Forty-one percent (41%) say they feel they will be better off in the next three years compared to 23% who say worse off and 30% who say they will be about the same. Again, these numbers are quite similar to those reported in 2013.

### B. Assessing the Rouhani Administration

**Table 25. How do you rate the job performance of Rouhani with respect to each of the following issues?**

	Excellent/Good	Fair/Poor
Overall	<b>54</b>	44
Expanding employment opportunities	49	48
Advancing democracy	52	47
Increasing rights of women	48	<b>50</b>
Ending corruption and nepotism	53	45
Political and governmental reform	51	48
Improving Iran's standing in the world	51	48
Improving relations with the U.S. and the West	50	48
Improving relations with Arab neighbors	<b>56</b>	42
Protecting personal/civil rights	50	49

In 2013, when we polled Iranians, confidence in the new president's commitment to address a series of pressing concerns was slightly above 50%. In the current survey, we find that Iranians are still divided in the confidence they have in the president. When we asked Iranian respondents to rate Rouhani's job performance on the same series of concerns, we find that a similar percentage, just above 50%, consider Rouhani to be doing an "excellent" or "good" job. His performance is assessed most positively with respect to improving relations with Iran's Arab neighbors (56% say excellent or poor) and his overall performance (54%), while he receives his lowest ratings for increasing the rights of women (48%) and expanding employment opportunities (49%).

## C. Iran's Foreign Policy Impact

<b>Table 26. Has your country had a positive or negative impact on developments in each of the following countries?</b>			
		<b>2013</b>	<b>2014</b>
Syria	Positive	44	<b>72</b>
	Negative	54	8
	No impact	1	16
Bahrain	Positive	50	<b>54</b>
	Negative	45	7
	No impact	3	34
Lebanon	Positive	50	<b>68</b>
	Negative	44	9
	No impact	4	15
Iraq	Positive	41	<b>77</b>
	Negative	52	5
	No impact	3	11
Yemen	Positive	57	<b>52</b>
	Negative	32	5
	No impact	7	35

Last year and again in the current survey, we asked Iranians to assess their country's impact on developments in five Arab countries. In 2013, the results were decidedly mixed, with respondents split on Iran's impact in Bahrain and Lebanon, leaning negative on their country's policies toward Syria and Iraq, and leaning positive with respect to Iran's impact on Yemen. In the current poll, however, Iranians are far more supportive of their government's foreign policy engagements, with more than two-thirds of respondents saying Iran is having a positive impact on Iraq (77%), Syria (72%), and Lebanon (68%). Majorities also say Iran is having a positive influence on developments in Bahrain (54%) and Yemen (52%). Significantly, those who do not rate their country's impact as positive in the current poll are far more likely to say Iran is having "no impact" than to say the impact is negative.

**Table 27. How important is it for your country to be involved in each of the following countries?**

	Important	Not important
Syria	90	7
Bahrain	82	16
Lebanon	88	10
Iraq	87	10
Yemen	62	36

*Note: Important is an aggregation of the responses "very important" and "somewhat important." Not important is an aggregation of the responses "somewhat unimportant" and "not important at all."*

Iranian respondents consider their country's involvement in each of these countries to be important. They are most emphatic with respect to Iran's involvement in Syria (90%), Lebanon (88%), and Iraq (87%), as well as Bahrain (82%). Involvement in Yemen is considered important by 62% of respondents and not important by 36%.

## D. Iran's Nuclear Program

**Table 28. What is your opinion on nuclear weapons?**

	2013	2014
My country should have nuclear weapons because it is a major nation.	31	49
As long as other countries have nuclear weapons, we need them also.	37	38
Nuclear weapons are always wrong and so no country, including my own, should have them.	29	14

In 2013 and again in 2014, we asked Iranians for their opinions on nuclear weapons. Overall, in the past year, the Iranian public's support for their country's right to possess nuclear weapons has increased from 68% to 87%, while the percentage of those opposed dropped from 29% in 2013 to only 14% in 2014. Almost half of the respondents (49%) say Iran "should have nuclear weapons because it is a major nation."

**Table 29. Do you agree or disagree that maintaining our right to a nuclear program is worth the price being paid in economic sanctions and international isolation?**

	2013	2014
Agree	96	64
Disagree	4	36

*Note: Agree is an aggregation of the responses "strongly agree" and "somewhat agree." Disagree is an aggregation of the responses "somewhat disagree" and "strongly disagree."*

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In 2013, Iranians were nearly unanimous (96%) in saying that maintaining their right to a nuclear program was worth the price being paid in economic sanctions and international isolation. In the current survey, we see a significant decline in this sentiment, though a majority of Iranians is still in agreement (64%) that their nuclear program is worth the price in sanctions.



## VII. Impact of Other Countries on the Peace and Stability of the Arab World

**Table 30. Contributes to Peace and Stability in the Region**

		Lebanon			Jordan			Egypt			KSA			UAE			Turkey		Iraq		Iran
		2011	2012	2014	2011	2012	2014	2011	2012	2014	2011	2012	2014	2011	2012	2014	2012	2014	2012	2014	2014
U.S.	Agree	16	34	13	5	83	14	10	50	19	24	74	9	8	81	9	15	7	40	28	4
	Disagree	84	64	<b>84</b>	95	13	<b>82</b>	89	49	<b>81</b>	71	24	<b>88</b>	87	17	<b>89</b>	84	<b>90</b>	56	<b>65</b>	94
Iran	Agree	57	81	<b>64</b>	22	23	14	32	25	11	4	15	23	12	23	16	15	17	63	42	98
	Disagree	42	16	33	72	70	<b>85</b>	68	75	<b>88</b>	95	83	74	80	71	<b>80</b>	84	<b>78</b>	34	<b>57</b>	0
Turkey	Agree	85	52	<b>60</b>	58	74	30	65	87	32	76	73	<b>86</b>	61	64	<b>74</b>	96	<b>69</b>	49	49	49
	Disagree	15	46	36	35	19	<b>66</b>	35	12	<b>66</b>	21	23	10	28	34	19	1	29	48	47	48
KSA	Agree	61	35	10	57	87	33	82	94	<b>68</b>	99	84	<b>76</b>	66	66	<b>81</b>	72	39	55	31	15
	Disagree	39	63	<b>43</b>	42	11	<b>65</b>	17	5	31	1	14	18	25	30	14	26	<b>52</b>	43	<b>61</b>	82
Russia	Agree		16	36		31	10		18	39		25	24		39	33	15	15	22	20	<b>77</b>
	Disagree		82	<b>59</b>		68	<b>86</b>		80	<b>60</b>		72	74		59	<b>65</b>	84	<b>82</b>	76	<b>77</b>	21
Qatar	Agree			49			47			25			<b>52</b>			42		42		38	27
	Disagree			48			52			<b>74</b>			44			<b>53</b>		<b>54</b>		<b>58</b>	70
China	Agree			24			8			<b>55</b>			15			19		29		22	38
	Disagree			<b>70</b>			<b>88</b>			44			74			<b>77</b>		<b>64</b>		<b>75</b>	60

*Note: Agree is an aggregation of "strongly agree" and "somewhat agree." Disagree is an aggregation of "somewhat disagree" and "strongly disagree." The 2011 survey asked about the United States, Iran, Turkey, and Saudi Arabia. In 2012, we added Russia; and for the current survey, we added Qatar and China.*

In 2011, 2012, and again in the current survey, we asked respondents if several countries contribute to peace and stability in the Arab World. Overall, in the most recent results we find that the United States, followed by Russia, China, and Iran, receive the poorest scores with overwhelming majorities believing that all of these countries have a negative impact on the region. There are just three exceptions: Three-quarters of Iranian respondents (77%) agree that Russia contributes to peace and stability in the Middle East; a majority of Egyptians (55%) view China's contribution positively; and about two-thirds of Lebanese respondents (64%) view Iran's role in the region favorably.

At least eight in 10 respondents in seven of the eight countries surveyed feel that the United States does not contribute to the region's peace and stability. (Among Iraqis, 65% view the United States' role negatively.) These 2014 figures reflect a precipitous decline in the perception of the U.S. role in the region, after a significant spike upward in 2012. The drop is most noticeable among those in Saudi Arabia (from 74% in 2012 to 9% in 2014) and in the UAE (from 81% to 9%), Jordanians (from 83% to 14%), and Egyptians (50% to 19%).

Comparing the 2012 survey to this one, Iran's positive marks also suffered a decline in several countries, most notably in Lebanon (81% to 64%), Iraq (63% to 42%), and Egypt (25% to 11%). When reviewing the results by sect, we find that the decline amongst the Lebanese was relatively evenly distributed between Sunni (from 73% in 2012 to 52% in 2014) and Shia (from 91% to 76%). In Iraq, however, we see a precipitous decline in Shia numbers, from 88% in 2012 to 54% in the current survey, while Sunni agreement that Iran contributes to the regional peace and stability actually rose from 10% in 2012 to 20% in 2014.

Turkey fared better than most others, with majorities in Saudi Arabia (86%), the UAE (74%), and Lebanon (60%) agreeing that Turkey contributes to the region's peace and stability. Attitudes are split amongst Iranians (49% vs. 48%) and Iraqis (49% vs. 47%). Comparing Turkey's positive ratings in 2012 to those received in this survey, we find that it suffered a serious decline among Egyptians (from 87% to 32%) and Jordanians (from 74% to 30%). Interestingly, Turks themselves rated their own country's impact 27 points lower in 2014 (from 96% to 69%).

Saudi Arabia's contribution to the region's peace and stability is seen positively by Egyptians (68%) and Arabs in the Emirates (81%), but its role is seen negatively in every other country, particularly by Iranians (15%) and the Lebanese (10%). The positive impact of the Kingdom declined significantly from 2012 to 2014 in Jordan (87% to 33%), Turkey (72% to 39%), and Iraq (55% to 31%), but rose significantly among Arabs in the UAE (66% to 81%).

In the current survey, Qatar is seen as playing a somewhat positive role by those in Saudi Arabia (52% vs. 44%), but it received mixed ratings in Lebanon (49% vs. 48%) and Jordan (47% vs. 52%) and lower scores in every other country, with the least positive scores from Egypt (25%) and Iran (27%).

## VIII. Concern with Christians and Other Non-Muslim Minorities, and Concern with the Rise of Sectarian Division

### A. Christians and Other Non-Muslim Minorities

**Table 31. How concerned are you with the situation of Christians and other non-Muslim minorities in the Middle East?**

	Lebanon	Jordan	Egypt	KSA	UAE	Iraq	Turkey	Iran
Concerned	<b>81</b>	35	<b>76</b>	<b>53</b>	<b>54</b>	33	<b>53</b>	24
Not concerned	19	65	24	47	46	67	47	76

*Note: Concerned is an aggregation of the responses "very concerned" and "somewhat concerned." Not concerned is an aggregation of the responses "somewhat unconcerned" and "not concerned at all."*

In five of the eight countries, majorities say that they are concerned with the situation of Christians and other non-Muslim minorities in the Arab World, with the greatest concern coming from Lebanese (81%) and Egyptians (76%). Slimmer majorities in the UAE (54% vs. 46% not concerned), Turkey (53% vs. 47%), and Saudi Arabia (53% vs. 47%) also lean toward concern about religious minorities. Only among respondents in Iran (76%), Iraq (67%), and Jordan (65%) are majorities not concerned about these groups.

### B. Rise of Sectarian Division

**Table 32. How concerned are you that sectarian division is growing across the region?**

	Lebanon		Jordan		Egypt		KSA		UAE		Turkey		Iraq	
	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014
Concerned	100	<b>65</b>	87	<b>79</b>	83	<b>70</b>	82	<b>79</b>	65	46	83	<b>68</b>	97	<b>64</b>
Not concerned	0	35	9	21	15	30	14	22	25	<b>54</b>	12	32	0	36

*Note: Concerned is an aggregation of the responses "very concerned" and "somewhat concerned." Not concerned is an aggregation of the responses "somewhat unconcerned" and "not at all concerned."*

In every country, other than the UAE, more than six in 10 respondents are concerned with heightened sectarian divisions in the Arab World. Concern is strongest in Saudi Arabia (79%) and Jordan (79%). Arabs in the UAE are divided on this question with 46% expressing concern and 54% saying they are not concerned. In all countries, respondents indicate a decline in the concern with sectarian division between 2012 (when this question was previously asked) and the current survey. This is most notable in UAE (from 65% in 2012 to 46% in 2014) and Turkey (from 83% to 68%), and surprisingly in Lebanon (from 100% to 65%) and Iraq (from 97% to 64%).

## C. Sectarian Division and the Conflict in Syria

Sectarian divisions are particularly evident in responses to questions in the survey regarding the conflict in Syria. In this area, **we find deep divides in attitudes expressed by Sunni and Shia Muslims in all countries** that have significant communities of both sects (Lebanon, Saudi Arabia, UAE, Iraq, Iran, and Turkey). For example, when asked about Iran's and Saudi Arabia's roles in Syria, Shia Muslims see Iran playing a positive role, while Sunni Muslims view Saudi Arabia as having a more positive impact. (See Table 9a, p. 16). And when respondents select whom they most favor in the Syrian conflict and what the worst possible outcome of that conflict would be, Shia express support for the Assad regime, while Sunni show support for the Syrian opposition. (See Table 6a, p. 12, and Table 7a, p. 13.)

**There are, however, significant areas where the views of Sunni and Shia converge.** Both groups agree that the fragmentation of Syria into sect or ethnic regions would be a bad outcome for the country. (See Table 7a, p. 13.) And both agree that the conflict in Syria has contributed to an increase in sectarian tensions and radicalization in their countries. (See Table 10a, p. 17.)

# Methodology and Demographics

## Demographics

	Lebanon	Jordan	Egypt	KSA *	UAE *	Iraq	Turkey	Iran
Male	49	50	50	56	67	51	50	50
Female	51	50	50	44	33	49	50	50
Under 25	17	23	20	26	18	23	17	25
25-36	28	28	31	32	42	32	27	29
Over 36	55	49	50	42	40	46	56	46
Sunni	28	95	90	75	88	36	87	11
Shia	27	2	1	14	12	63	13	89
Christian	40	2	9	5	0	0	0	0
Druze	6	0	0	0	0	0	0	0
Other	0	0	0	6	0	0	0	0
Live in city	86	85	58	83	84	64	74	78
Live outside city	14	15	42	17	16	36	26	22
Citizens				70	40			
Residents				30	60			

*\* The samples in Saudi Arabia and the United Arab Emirates are not evenly divided between male and female subjects because of the disproportionate number of males in these populations with the inclusion of residents (who are predominantly male) in addition to citizens.*

## The geographic coverage for the opinion research was as follows:

- Lebanon—East Beirut, West Beirut, Baabda, El Maten, Tripoli, Akkar, Baalbek, Saayda
- Jordan—Amman City, Balqa, Madaba, Irbid, Jarash, Zarqa, Mafraq, Aqaba
- Egypt—Cairo, Giza, Shoubra Al Khima, Alexandria, Mansura (urban), Mansura (rural), Menia (urban), Menia (rural), Asyut (urban), Asyut (rural), Tanta (urban), Tanta (rural)
- KSA—Riyadh, Buraydah, Dirap, Dereya, Nazeem, Ammaryah, Onayzah, Khabrah, Shammasyah, Jeddah, Taif, Makkah, Shoa'aybah, Dammam, Al Khobar, Dhahran, Jubail, Hufuf
- UAE—Abu Dhabi, Dubai, Sharjah, Ajman, Fujairah, Ras Al Khaimah, Umm Al Quwain
- Iraq—Baghdad, Diyala, Anbar, Basra, Tikrit, Kirkuk, Mosul, Al Hilla, Karbala, Nassiriyah, Sulaymaniyah, Arbil, Fallujah, As Samawah
- Turkey—Istanbul, Ankara, Izmir, Bursa, Adana, Gaziantep, Konya, Antalya, Diyarbakir, Mersin, Kayseri, Haymana, Ceyhan
- Iran—Teheran, Rasht, Esfahan, Yazd, Shiraz, Kerman, Mashhad, Tabriz, Ahwaz

## Sample sizes, margins of error, and fieldwork dates:

Country	Sample Size	Margin of Error (MOE)	Fieldwork Dates
Lebanon	816	MOE +/- 3.4 percentage points	Sept. 4–28, 2014
Jordan	821	MOE +/- 3.4 percentage points	Sept. 4–30, 2014
Egypt	1,014	MOE +/- 3.1 percentage points	Sept. 5–25, 2014
KSA	1,024	MOE +/- 3.1 percentage points	Sept. 6–29, 2014
UAE	824	MOE +/- 3.4 percentage points	Sept. 5–26, 2014
Iraq	1,025	MOE +/- 3.1 percentage points	Sept. 5–Oct. 3, 2014
Turkey	1,026	MOE +/- 3.1 percentage points	Sept. 5–30, 2014
Iran	1,017	MOE +/- 3.1 percentage points	Sept. 5–27, 2014

## Sampling Methodology:

In each country, the selected study centers were stratified depending on the predominant social class/income levels of the people residing in various areas (and in case of Beirut, the religious clusters). This is because in most cities/towns, people of a specific social class/income segment/religious grouping tend to stay in clusters. These strata were further sub-divided into blocks of roughly equal size, based on available data about population. Thereafter, blocks were selected at random depending on the sample size for that center and keeping in mind the social class/religious cluster distribution. A pre-assigned number of starting points were used for each selected block and sampling within the blocks was undertaken using right hand rule method. Within each selected household that agreed to participate, we took an inventory of all family members over 18 years of age and randomly selected one adult to be interviewed in a way that ensured that both genders had an equal chance of inclusion, with no one allowed to self-select into the sample.







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