Trends in shifting perceptions of Jordanians

Foreign Relations Survey – Wave V

1. Introduction

Drawing on five survey waves conducted between 2019 and 2025 with interim data from early 2024, this analysis explores how Jordanians' views on foreign relations, regional stability, and key international partners have evolved over time. The findings reveal a pattern of steady continuity anchored in Gulf alliances, alongside volatile perceptions driven by regional crises, most notably the Gaza war.

Between 2019 and 2025, confidence in Jordan's regional role and diplomatic credibility remained intact, yet perceptions of the broader Middle East grew markedly pessimistic. The data illustrate a decisive shift toward economic pragmatism: Jordanians increasingly judge foreign policy not by symbolic roles or ideological alignment, but by its tangible domestic dividends-investment, job creation, and stability.

The analysis also captures clear inflection points: optimism in 2021 during a phase of regional de-escalation, a recalibration in 2023 amid normalization efforts and shifting power balances, and a sharp deterioration by 2024 following the Gaza conflict. Together, these trends depict a Jordanian public that remains steadfast in its alliances and values but more analytical, risk-aware, and outcome-driven in how it evaluates foreign policy success.

2. Economic vs. Symbolic Diplomacy

The data suggests a gradual yet unmistakable transformation in Jordanians' conception of what constitutes effective foreign policy. The public discourse has shifted from symbolic affirmation-anchored in heritage, identity, and moral leadership-toward an insistence on measurable economic returns. The contrast between the constancy of pride and the volatility of satisfaction illustrates the widening gap between diplomatic legitimacy and economic deliverables.

2023's data demonstrates the consolidation of this economic turn. Nearly half of all respondents (48%) identified economic development as Jordan's paramount foreign-policy priority, eclipsing traditional causes by a wide margin. This transition occurred against a backdrop of macroeconomic pressure-global inflation, currency fluctuations, and fluctuating aid commitments-that made the link between diplomacy and livelihoods more visible. Although respondents continued to rate Jordan's foreign policy as "very effective" in safeguarding Jerusalem (60.7%) and defending Palestinian rights (59.7%), satisfaction fell sharply when assessing its ability to attract investment (38.6%) or secure economic support (37.9%). The disparity between symbolic success and economic payoff thus widened into a defining feature of the national mood.

By 2025, the public's expectations had crystallized into a coherent framework of economic diplomacy. In open-ended responses, Jordanians increasingly equated successful foreign relations with tangible inputs-capital inflows, export access, and job creation—rather than rhetorical alignment or prestige. This evolution was reinforced by the Kingdom's Economic Modernization Vision (2023–2033), which tied external engagement to domestic growth targets, and by visible policy outcomes such as Gulf investment pledges and the Arab Coordination Group's financial commitments. The results show a public that no longer separates the economy from the diplomatic: legitimacy abroad is now judged by outcomes at home.

The trend encapsulates a redefinition of foreign policy accountability. Symbolic leadership-particularly on Palestine-remains an indispensable pillar of Jordan's moral authority, but it no longer suffices as a measure of efficacy. Jordanians now demand that foreign partnerships generate discernible improvement in economic welfare, employment, and fiscal stability. In effect, public opinion has moved from symbolic affirmation to transactional evaluation, signaling the maturation of a society that weighs diplomacy not by its rhetoric, but by its yield.

3. Hierarchy of Partners

Across the five waves, Jordanians' perceptions of trusted partners remained structurally consistent but dynamically responsive to political and economic shocks. Longitudinal data delineate a hierarchy in which Gulf states maintain primacy, the United States fluctuates between strategic indispensability and declining public confidence, emerging powers such as China experience brief surges of interest, and European actors preserve a steady yet secondary position.

In 2019, the partnership order was dominated by Saudi Arabia and the United States, cited respectively by 30.6 %and 24.6 %of respondents as Jordan's principal economic supporters. Together they accounted for more than half of all mentions, affirming that public perceptions of external reliability were firmly anchored in traditional alliances that combine financial assistance, labor opportunities, and security coordination. Other Arab states registered modest shares-Kuwait at roughly 10 %, Qatar at 6.8 %, and the United Arab Emirates at 6.9 %-reflecting acknowledgment but not yet equivalence with Riyadh's strategic centrality.

By 2021, the United States reached its zenith, with 49.3 %identifying it as Jordan's leading economic partner, while Saudi Arabia fell to 22.7 %. The shift coincided with pandemic-era economic relief and renewed U.S. development assistance under the Biden administration, contrasting with a temporary Saudi focus on domestic diversification and reduced regional liquidity. The inversion of rankings during this period demonstrated how rapidly Jordanian opinion adjusts to the visibility of short-term aid flows and the immediacy of fiscal support rather than to enduring strategic logic.

The 2023 wave marked a decisive re-ordering. As global inflation and regional energy shocks deepened, Saudi Arabia's prominence rebounded to 35.4 %, reclaiming its leading position, while the United States declined to 20.5 %. The resurgence of Riyadh's image reflected new deposits in the Central Bank of Jordan and investment pledges connected to infrastructure and tourism, whereas the decline in U.S. standing paralleled perceptions of limited American engagement in economic stabilization. During the same period, China experienced a sudden rise-from 0.4 %in 2021 to 7.1 %in August 2023-largely driven by expanding trade and contractor activity in energy and telecommunications. Yet the momentum faded quickly as expectations of large-scale financing went unfulfilled.

By 2025, the hierarchy reconsolidated around its original poles. Saudi Arabia retained leadership with 32.6 %, the United States recovered modestly to 36 % and the UAE and Qatar improved their profiles to 3.7 %and 3 %, respectively, owing to high-visibility humanitarian interventions during the Gaza conflict. The cumulative share of Gulf partners approached half of all responses, confirming that geographic proximity, cultural affinity, and liquidity remain the dominant variables shaping public trust.

The political dimension follows the same architecture. Saudi Arabia continues to be identified as Jordan's closest political ally by roughly one-third of respondents in each wave, followed by the United States at about one-fifth and Egypt at just above one-tenth. European states such as the United Kingdom and France maintain recognition for professionalism and institutional cooperation but do not command emotive allegiance. Interim data from early 2024 reveal that the Gaza war recalibrated this moral hierarchy of partners: Qatar's standing rose sharply due to its mediation role and humanitarian diplomacy, while American favorability dipped amid frustration with Washington's crisis posture. The resilience of Saudi Arabia's image-never dropping below 22 %across the six-year period-illustrates the robustness of economic interdependence and political alignment as determinants of trust.

Taken together, the 2019–2025 trajectory depicts a three-layered but cohesive alliance system in Jordanian public consciousness. Gulf partners occupy the top tier as reliable patrons, the United States remains indispensable but subject to confidence cycles, and external factors such as China and Europe perform auxiliary roles in technology, trade, and development. The enduring message is that Jordanians judge alliances through a pragmatic calculus of economic utility and security assurance. Ideological affinity has given way to an evidence-based realism in which the durability of support, not its rhetoric, defines credibility.

4. Jordan's Regional Role

Public perceptions of Jordan's regional role have evolved in step with the shifting political and economic context of the Middle East, revealing a delicate balance between enduring confidence and a growing awareness of structural limits. The 2023 survey marked the apex of public confidence. Close to three-quarters of Jordanians (74%) stated that their country's regional role had strengthened since the Arab Spring. This peak coincided with a brief period of synchronized Arab diplomacy: Amman's participation in trilateral economic projects with Egypt and Iraq, the re-opening of official channels with Damascus, and the launch of cross-border energy interconnection schemes. Jordan's role as a bridge between Gulf financiers, Levantine markets, and Western institutions resonated strongly with respondents who saw in these developments evidence of renewed strategic relevance.

The subsequent 2025 reversal was pronounced though not catastrophic. By mid-2025, the share of Jordanians who felt their country's influence had increased to about 68%, while 20% judged it unchanged and 11% believed it had declined. This moderation is directly traceable to two sets of pressures: externally, the Gaza war and the broader Israel–Iran escalation re-centered security risks on Jordan's borders, constraining its diplomatic bandwidth; internally, rising living costs, high youth unemployment, and fiscal tightening eroded confidence that regional leadership could translate into domestic stability.

Qualitatively, among those who perceived a decline in influence, 28.7% cited regional instability as the main cause, and 28.4% pointed to worsening economic conditions. The convergence of these explanations underscores how closely Jordanians now link their country's foreign policy performance to domestic outcomes. For most citizens, Jordan's credibility abroad is sustainable only if it is accompanied by tangible economic resilience at home.

Despite this moderation, the overall trajectory remains positive: the majority still regard Jordan as an indispensable regional stabilizer. The decline from the 2023 peak reflects recalibration rather than disillusionment. It demonstrates a sophisticated public awareness that influence is contingent earned through consistent diplomacy, but vulnerable to exogenous shocks.

In essence, Jordanians continue to view their country as a linchpin of moderation, valued for mediation and moral authority, yet they increasingly measure its regional weight through an economic lens. The trend therefore illustrates not diminished pride, but a maturing realism – an understanding that Jordan's power lies not in projection, but in its capacity to manage volatility and sustain coherence within an ever-fragmented Middle East.

5. Regional Stability and Threat Perceptions

How Jordanians recalibrate their outlook in response to concrete geopolitical shifts rather than general sentiment is depicted in the five surveys through perceptions of regional stability. The data reveal clear inflection points-periods of cautious optimism followed by sharp reversals-that align closely with regional conflict cycles, economic performance, and changes in Jordan's immediate security environment.

In 2019, more than eight in ten respondents viewed the Middle East as unstable. This coincided with the aftershocks of the Syrian conflict, ongoing war in Yemen, and uncertainty surrounding U.S. regional policy under the Trump administration. Domestically, slow growth and fiscal tightening reinforced the perception that Jordan was operating in a volatile external environment with limited insulation from regional shocks.

By 2021, assessments improved slightly: roughly one in five Jordanians considered the region relatively stable. This modest rebound followed the Al-Ula Declaration, which ended the Gulf rift and restored coordination within the GCC, and a lull in major confrontations involving Israel or Iran. The reduction in cross-border tensions, alongside expanded pandemic-era aid inflows, produced a short-lived sense that regional volatility was being attained rather than escalating.

Optimism peaked in 2023, when close to 45% of respondents described the region as stable-the highest level since 2019. This surge corresponded with a visible phase of regional normalization: Saudi Iranian dialogue advanced, Arab states reopened channels with Damascus, and energy-trade initiatives with Iraq and Egypt suggested a regional pivot toward reconstruction and economic integration. Jordanians interpreted these developments as early signs that the Middle East was moving from confrontation to cautious cooperation.

The reversal in 2024–2025 was abrupt. The Gaza war, beginning in late 2023, and subsequent Israel–Iran military exchanges erased earlier confidence. By mid-2025, three-quarters of respondents again viewed the Middle East as unstable-returning almost exactly to the 2019 baseline. The magnitude of this swing illustrates how quickly perceptions respond to acute security crises, especially when the conflict has geographic and humanitarian proximity to Jordan.

Threat perceptions followed the same trajectory but became far more concentrated. In 2019, Jordanians divided their concerns among Israel, Iran, and the United States. By 2023, Israel led the list at roughly 45%, and by 2025 it exceeded 75%, reflecting the war in Gaza, the expansion of settlements, and repeated border incidents that heightened perceptions of direct risk. Meanwhile, Iran's share dropped into single digits, as its confrontation with Israel was viewed as largely peripheral to Jordanian security.

Despite these rising fears, most Jordanians continue to favor non-alignment and diplomatic management: about half consistently support neutrality in regional wars, and around 40% advocate mediation. This pattern suggests that public concern translates into calls for stronger defensive capability and humanitarian engagement, not for offensive posturing or new alliances.

Taken together, the 2019–2025 data portray a public that tracks regional volatility with precision but responds through caution, not escalation. Jordanians recognize their country's exposure to external instability but see its comparative advantage in maintaining internal order, diplomatic balance, and credible deterrence. The long-term trend underscores a pragmatic realism: Jordan's foreign policy is valued when it shields the domestic sphere from regional disorder rather than when it projects power outward.

6. Palestine, Israel, and the Gaza War

Jordanians' perceptions of the Palestinian issue and of Israel have undergone the most pronounced and emotionally charged transformation in the dataset. The surveys trace a steady hardening of attitudes, in which sympathy for the Palestinian cause remains unwavering but tolerance for diplomatic accommodation with Israel has sharply diminished. The trajectory over the past few years encapsulates both enduring moral conviction and the impact of recurrent crises in reshaping public sentiment.

In 2019, public opinion toward Israel was skeptical but not uniformly hostile. Roughly 49% of respondents described political relations as "good," while 39.8% deemed them "bad." Only about 7% supported strengthening ties, compared with 69.9% who favored limiting them. Although relations were cold, they were not yet viewed as an existential threat: Israel ranked among several perceived security risks, alongside Iran and the United States.

By 2021, views hardened modestly as settlement expansion and recurrent tensions in Jerusalem eroded trust. Yet the dominant posture remained cautious neutrality rather than outright rejection. Support for maintaining, rather than cancelling, the peace treaty hovered near 55%, a sign that the public still valued stability even amid frustration.

The 2023 wave marked a decisive escalation in negative sentiment, with nearly 45% of respondents named Israel as the greatest security threat to Jordan-up from roughly one-third in 2021 while fewer than 10% favored any form of normalization. The shift coincided with the Abraham Accords' expansion and regional normalization trends that Jordanians largely perceived as undermining Palestinian rights. The same survey showed that 52% of respondents rejected both the one-state and two-state solutions, revealing deep disillusionment with diplomatic frameworks that had long defined the peace process.

The Gaza war since late 2023 transformed this skepticism into near-universal condemnation. By mid-2025, more than three-quarters (76%) of respondents cited Israel as Jordan's principal security threat-the highest figure ever recorded in the series. The intensity of the conflict, the scale of civilian casualties, and the perceived impotence of international mediation reinforced a view of Israel not merely as a difficult neighbor but as the central destabilizing actor in the region. Iran's share as a perceived threat, by contrast, fell below 10%, indicating a re-prioritization of security anxieties.

This surge in opposition translated into a demand for diplomatic distance. 77% of respondents in 2025 favored limiting relations with Israel, while 45% explicitly supported cancelling the 1994 peace treaty-a figure nearly double that of 2019. At the same time, Jordan's response to the Gaza crisis was widely endorsed: 44% of respondents identified Jordan's stance as closest to their own, far exceeding the share for any other Arab state. This alignment underscores that the public's opposition to Israel coexists with strong approval of Jordan's cautious, humanitarian, and mediation-based approach.

Public attitudes toward the Wadi Araba peace treaty reveals a striking post–October 7 recalibration. In early 2024, only 29.4% supported maintaining the treaty, compared to 68.6% who favored its cancellation-reflecting frustration with the peace process and anger over Israeli actions. By mid-2025, however, 52.1% now favor keeping it, while 45.5% support its annulment. This reversal does not signify warming toward Israel but rather a reassertion of strategic caution.

In a region marked by war and fragmentation, many Jordanians view the treaty as a protective buffer preserving the country's security and sparing it the fate of neighboring states consumed by instability. Roughly a quarter of respondents remain torn-sympathetic to Palestinian suffering yet wary that ending the treaty could endanger Jordan's fragile equilibrium. The data thus reflect a pragmatic recalibration: moral solidarity endures, but the instinct for stability and self-preservation has grown stronger.

Taken together, data over the past few years demonstrates how the Palestinian question remains the moral cornerstone of Jordanian foreign policy, while Israel's standing has deteriorated from wary tolerance to near-total mistrust. The Gaza war served as a catalytic event, converting diffuse frustration into structural hostility and reinforcing the domestic expectation that Jordan must preserve moral credibility through independence and restraint. The overarching pattern reflects moral consistency combined with strategic caution: unwavering solidarity with Palestine, firm disapproval of Israel's policies, and enduring confidence in Jordan's diplomatic balance as the region's last bastion of principled moderation.

7. Shifting Global Power Perceptions

Jordanians' perceptions of global influence and future power distribution have evolved from a unipolar understanding dominated by the United States to a more diversified, multipolar outlook that accords greater weight to China and the Gulf states. The trajectory captures a public increasingly aware of global realignments, evaluating external powers less through ideological affinity and more through perceived utility, reliability, and moral standing in moments of crisis.

The 2023 wave marked a discernible inflection toward multipolarity. Although the United States retained a commanding presence, its perceived dominance declined: 63% of respondents still considered it the world's most influential power. Simultaneously, China's share more than doubled to 14%, buoyed by growing economic engagement, Belt and Road visibility, and Jordan's trade diversification efforts. European powers held their positions but no longer represented a collective counterweight; instead, individual states such as the United Kingdom and France maintained reputational strength in education, security cooperation, and governance reform. Regional and multilateral organizations, such as the Gulf Cooperation Council (GCC) and the United Nations, rose in perceived importance, with over one-third of respondents describing them as "stabilizing institutions," underscoring an appreciation for multilateral frameworks grounded in consensus-building.

The 2025 survey, incorporating data from early 2024, solidified this shift. While 50.3 % of Jordanians continued to regard the United States as the preeminent global power, this represented a 20-point decline from 2019, confirming a gradual erosion of perceived hegemony. Conversely, expectations of China's future influence surged to 28.5 %, signaling a belief that the balance of power is tilting eastward. The European Union, though still trusted technical expertise and developmental cooperation, was not perceived as a decisive geopolitical actor. The Gaza war further altered the moral hierarchy of powers: the United States' image suffered visibly due to its perceived one-sided support for Israel, while China and Russia were increasingly viewed as alternative power centers capable of restraining Western dominance.

These perceptions also reflect broader shifts in Jordan's external relations. The country's deepening engagement with the Gulf, the reactivation of trade ties with Iraq and Syria, and participation in Chinese-financed projects have all contributed to a more diversified outlook. Yet, even as perceptions of the United States declined, Jordanians continued to recognize its indispensability in defense, higher education, and institutional reform. The result is not a rejection of the West but an articulation of strategic pluralism-a belief that Jordan must engage multiple centers of power to secure resilience and autonomy.

The trend thus delineates a refined worldview: the United States remains the fulcrum of current influence, but the future is increasingly imagined as multipolar, where China's economic gravity, Gulf capital, and regional diplomacy collectively dilute Western exclusivity. European partners retain normative credibility but limited leverage, while global institutions continue to serve as anchors of legitimacy rather than drivers of change. For Jordanian public opinion, power is no longer defined by dominance but by dependability-the capacity of a partner or bloc to deliver stability, investment, and moral coherence in an unpredictable international order.

8. Implications and Way Forward (2019–2025)

The evolution of Jordanian public opinion between 2019 and 2025 reflects a citizenry that has grown markedly more analytical, economically conscious, and strategically discerning. The previous surveys reveal consistent faith in Jordan's diplomacy but diminishing tolerance for symbolic achievement unaccompanied by material improvement. The pattern across all indicators – from stability perceptions to alliance hierarchies and views on global power – conveys a society that evaluates foreign policy less through rhetoric and loyalty than through results, credibility, and resilience.

At its core, the data chart a transition from moral idealism to pragmatic expectation. Jordanians view their country's foreign role not only through the prism of national pride, but more so through the realm of utilitarian efficacy, whereby economic diplomacy – evident in nearly half of respondents ranking investment and job creation as the foremost foreign-policy goal – marks a recalibration of national priorities. It suggests that Jordanians increasingly measure diplomacy by its ability to yield concrete benefits: employment, investment inflows, and enhanced trade connectivity and to a lesser extent in maintaining regional stability.

This is perhaps attributed to the sharp deterioration in perceptions of regional stability after 2023, driven by the Gaza war and wider geopolitical turbulence, which underscores how vulnerable public confidence is to exogenous shocks. Israel's rise as the dominant perceived threat demonstrates the extent to which regional crises override incremental diplomatic gains. Yet, the endurance of support for neutrality and mediation indicates that even under duress, Jordanians maintain a deeply ingrained preference for restraint. Public sentiment does not call for confrontation; rather, Jordanians opt for measured strength: credible defense capacity paired with humanitarian leadership.

The hierarchy of partnerships further illuminates this realism. Gulf allies – particularly Saudi Arabia, the UAE, and Qatar – continue to represent the cornerstone of Jordan's perceived external stability, accounting for nearly half of all responses in 2025. The United States retains its indispensability in defense, political utility, and more importantly – economic capacity. These dynamics confirm a Jordanian worldview that is not anti-Western but post-unipolar – rooted in diversification and conditional trust.

This convergence of attitudes holds significant implications for policy design and communication. First, Jordan's external engagement will be judged primarily by its economic yield. The government's ability to convert diplomatic relations into visible improvements in living standards will determine the sustainability of public support for its foreign policy agenda. Second, the data calls for strategic neutrality with assertive messaging: citizens favor diplomacy over alignment but expect firm, values-based positions, particularly pressing maters such as the Palestinian and regional humanitarian issues. Third, the maturation of public expectations necessitates a recalibrated narrative -one that bridges macro-diplomatic achievements (aid agreements, investment partnerships, and energy linkages) to tangible outcomes at the household level.

Ultimately, the Foreign Relations Survey – across its five waves, portrays a Jordanian public that is confident in its country's moral authority yet increasingly analytical about its performance. The national consensus privileges balance over bravado, economic results over rhetoric, and moral consistency over opportunism. For policymakers, the path forward lies in translating diplomatic credibility into economic resilience -ensuring that Jordan's foreign policy not only projects stability abroad but also sustains it at home. In a region defined by volatility, this fusion of moral clarity and pragmatic self-interest remains Jordan's most enduring source of strength.