



February 2021

KAS PoDiMed Survey 2020

Regional Program Political Dialogue South Mediterranean



The Covid-19 Challenge in the MENA

What are the Perceptions in the Region?

Executive Summary

The Middle East and North Africa (MENA) region was largely spared the worst effects of COVID during the first months of the global outbreak. Countries across the region pursued strategies to limit the spread of the virus, including one of the world's strictest lockdowns in Jordan starting in March 2020. These strong containment measures proved largely effective in limiting the spread across the region. The initial success led many countries to begin easing restrictions in early summer 2020. Many countries also worked to strengthen in the health sector, where investment had long been lacking across much of the region, to meet the expected effects of the pandemic. In summer 2020, the general narrative for the region was one of success, especially in comparison with the experience of countries like Spain, Italy, and the United States.

Unfortunately, initial success gave way to a vast outbreak of COVID across the region in early fall 2020. Case numbers started to rise dramatically across most MENA countries in September. Jordan's fatality rate rose to one of the highest in the world on a per capita basis. However, no country was fully spared, leading to renewed lockdowns in Algeria, Jordan, Lebanon, Morocco, and Tunisia. The KAS PoDiMed 2020 survey took place amidst this second wave of infections, although prior to the ensuing lockdowns in December 2020 and January 2021 across the region. The results reflect a point where the health crisis had begun, but before the vast scale of the challenge was not yet fully evident.

The results demonstrate a clear concern about the effects of COVID, with more than three-quarters rating the crisis as serious in all countries surveyed. Yet, at the same time, fewer than a quarter say that COVID is the biggest problem facing their country, falling below other concerns like economic growth, unemployment, or corruption. Still, citizens worry about COVID for multiple reasons, with majorities concerned about the potential for it to have negative effects on the health of their family, their personal economic situation, and economic conditions in their country more broadly. Concern about affording food is lower, but still majorities in half of the countries surveyed harbor this fear as a result of COVID.

Ratings of government performance on COVID vary widely across the countries surveyed but fall in line with general ratings of government overall. Despite the uptick in infections in the weeks before the survey, Jordanians and Moroccans are the most approving of the job their government was doing, while Tunisians and Lebanese have low levels of support. The survey provides additional evidence that effective government measures have paid off in terms of public attitudes. In most countries, relatively few citizens blame the spread of COVID primarily on the choices of their government. A key exception is Tunisia, where a majority say it is the fault of the government. Instead, in most countries, citizens are significantly more likely to say that COVID has spread due to the actions of citizens.

Overall, ratings of government correspond relatively closely with general levels of trust in government, suggesting that the two attitudes may be linked. If so, levels of trust in government may have later decreased as the pandemic has worsened, but if strong measures like the recent lockdowns are viewed as being effective, levels of trust in government may correspondingly increase as a result.

The results also make clear that the effects of COVID differ by gender in a number of ways. Women are significantly more concerned about COVID overall, more likely to say this is their country's biggest problem, and more worried about the effects on their family's health and ability to afford food as a result of COVID. Additionally, there are also disproportionate challenges for the poor who are substantially more likely to worry about the economic effects of the pandemic at both the level of their household economy and the national economy.

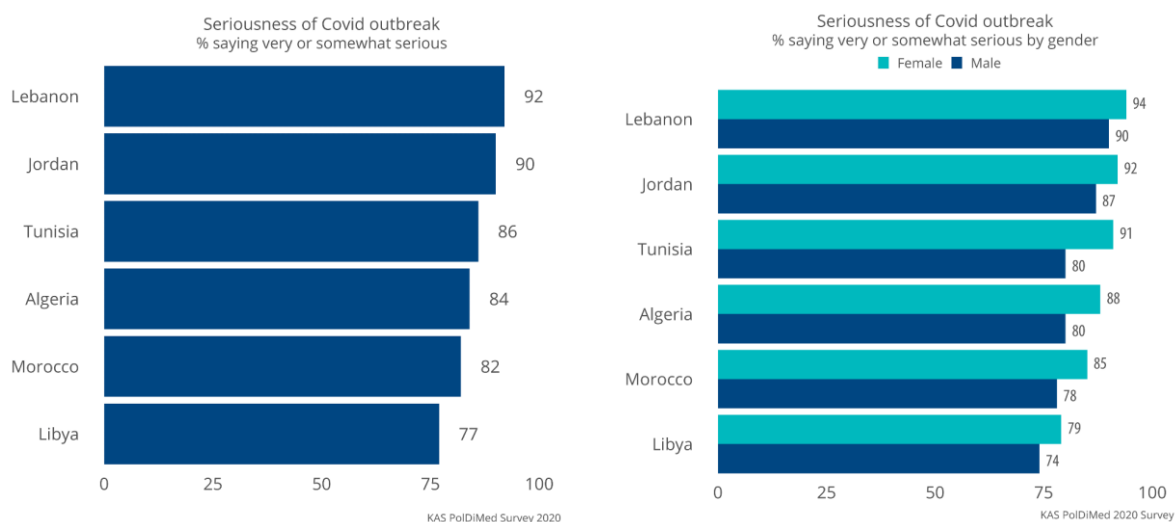
COVID will continue to place major stress on governments and citizens across the region. The pandemic has exacerbated many long-standing economic challenges facing MENA countries. Citizens take the health crisis seriously, but also worry about the effects on their basic livelihoods. Governments must work to effectively bring the pandemic back under control. Not only would this save lives, but governments that are seen as doing better on this front are also more widely trusted by their citizens. Increasing trust is especially important, as data from Arab Barometer has shown that across the region levels of trust in government has fallen by an average of 19 points over the last decade. COVID offers an important potential opportunity to begin rebuilding trust. Meanwhile, the international community also has a key role to play by working with governments to help address the basic needs of citizens who are suffering from this global scourge.

In pursuing policy solutions, it is essential that governments and international organizations pay particular attention to the needs of women and disadvantaged groups. The data suggest that these demographic groups are more likely to bear the brunt of the effects from COVID. Ensuring that programs are targeted to meet the needs of women and those who are economically less secure is essential to addressing the lasting effects from the COVID pandemic.

These findings are based on nationally representative public opinion surveys that included approximately 1,800 respondents in six countries: Algeria, Jordan, Lebanon, Libya, Morocco, and Tunisia, with a total of 10,841 respondents. Respondents were chosen randomly, meaning the results can be generalized to the broader population. The surveys were weighted to account for any random variations that may exist by gender, age, level of education, or geographic area. The margin of error for each country is less than ± 3 percent. All interviews were conducted between October 26 and December 8, 2020. The surveys were conducted on behalf of the Regional Program Political Dialogue South Mediterranean of the Konrad-Adenauer-Stiftung (KAS PoIDiMed) by Arab Research and Analytics Associates (ARAA).

Concern about COVID

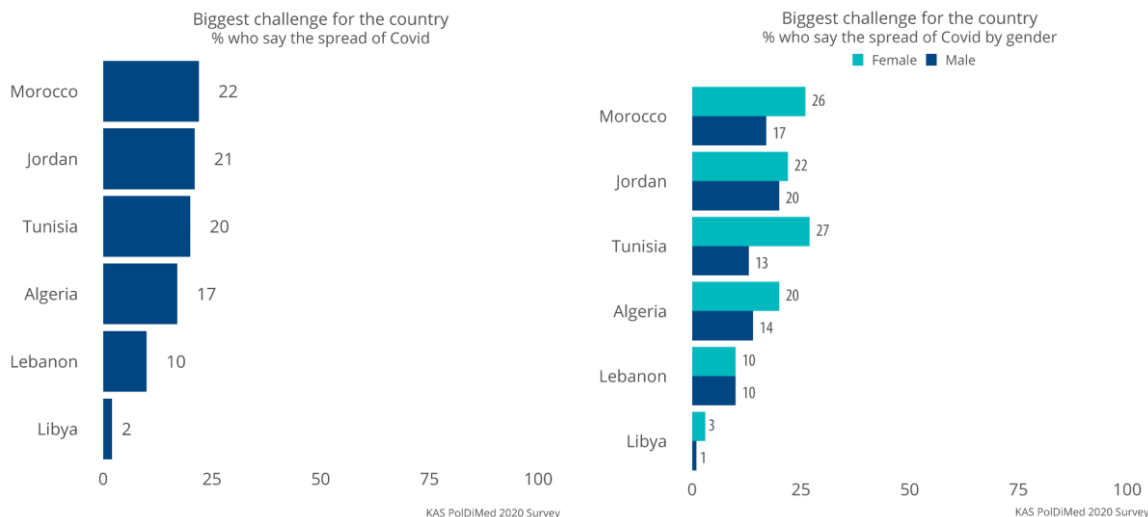
The KAS PoDiMed survey makes clear that concern about COVID is high across MENA. The vast majority of those surveyed say that the COVID outbreak in their country is very or somewhat serious, including 92 percent in Lebanon, 90 percent in Jordan, 86 percent in Tunisia, 84 percent in Algeria, 82 percent in Morocco, and 77 percent in Libya. These levels represent a significant increase since late summer 2020, when surveys from Arab Barometer found that fewer than three-quarters of citizens were concerned about COVID spreading in the coming six months, including just 61 percent in Jordan and 59 percent in Tunisia.



The results show that women are consistently more likely to say COVID represents a serious threat than men in the countries surveyed. The gap is largest in Tunisia (11 points), followed by Algeria (8 points), Morocco (7 points), Jordan (5 points), and Libya (5 points). This pattern is consistent with other surveys conducted in MENA as well as research from other regions showing that women are more worried about this problem. Additionally, those who have higher levels of education are typically more likely to view COVID as a serious threat to their country, including by 12 points in Tunisia, eight points in Libya, six points in Morocco, and five points in Jordan. Likely, this difference relates to the fact that those with university educations tend to be better informed about news and were more aware of the increasing challenge COVID represented at the time of the survey.

Despite widespread concern about COVID, relatively few citizens say that it is the biggest problem facing their country. In all countries surveyed, less than a quarter hold this view. In most countries surveyed, roughly twenty percent say it is the biggest challenge, including Morocco (22 percent), Jordan (21 percent), Tunisia (20 percent) and Algeria (17 percent). Across these countries, citizens tend to focus more on the challenges of economic growth and unemployment.

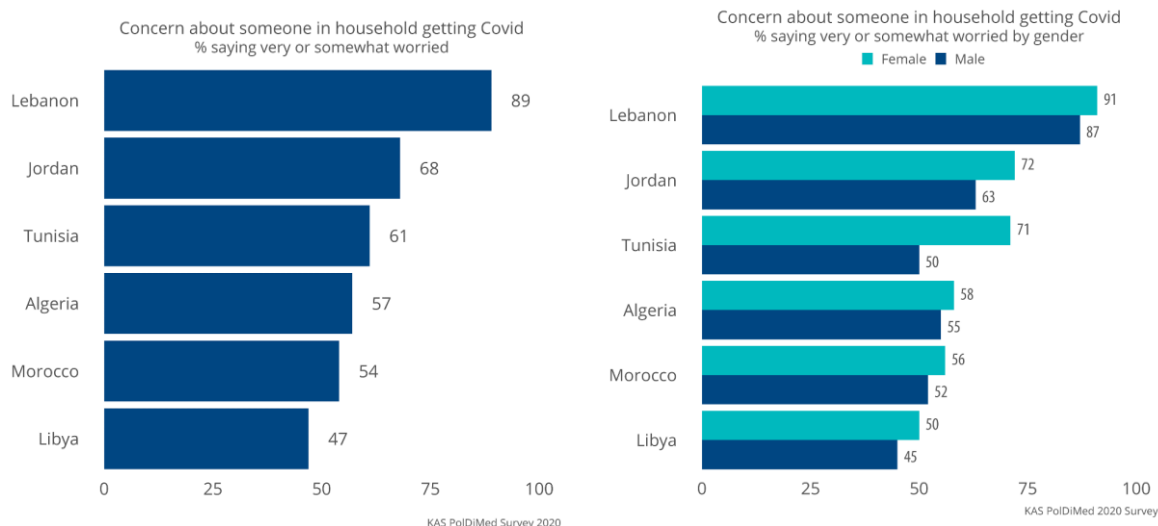
Citizens in Lebanon and Libya are less likely to say COVID is their country's biggest challenge. In Lebanon, only 10 percent cite COVID, with the vast majority of citizens perceiving the economic situation or corruption as the main problem. In Libya, just two percent say COVID, with the civil war and political instability being the primary concern of most citizens.



Again, there are significant gender differences in perceptions about the degree to which COVID is a problem in many countries. Women are twice as likely to say it’s the biggest problem in Tunisia compared with men (27 percent vs. 13 percent), while in Morocco the difference is nine points and in Algeria it is six points. This result suggests that women may be facing greater challenges due to COVID compared with men, or at least feel that it is a bigger challenge for their lives and their country.

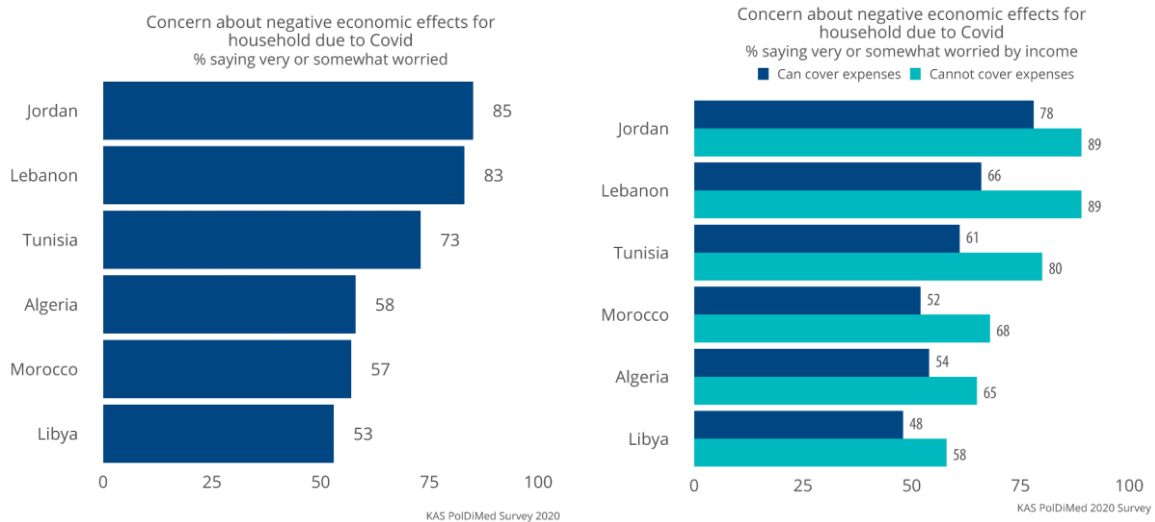
Reason for Concern

The challenges related to COVID are multifaceted, so understanding the reasons citizens worry about the pandemic is critical to addressing the longer-term effects. One potential concern is that COVID could lead to a family member becoming sick with the disease. In Lebanon this fear is nearly universal (89 percent) while concern is widespread but lower elsewhere in the region. Elsewhere, 68 percent in Jordan, 61 percent in Tunisia, 57 percent in Algeria, 54 percent in Morocco, and 47 percent in Libya hold this concern. The higher level in Lebanon may result from broader concerns in Lebanon about the health system being overwhelmed, particularly given the damage done to some of the country’s leading hospitals by the Beirut port explosion. However, it is important to note that majorities in all but one country surveyed are concerned about the health of their family due to COVID.



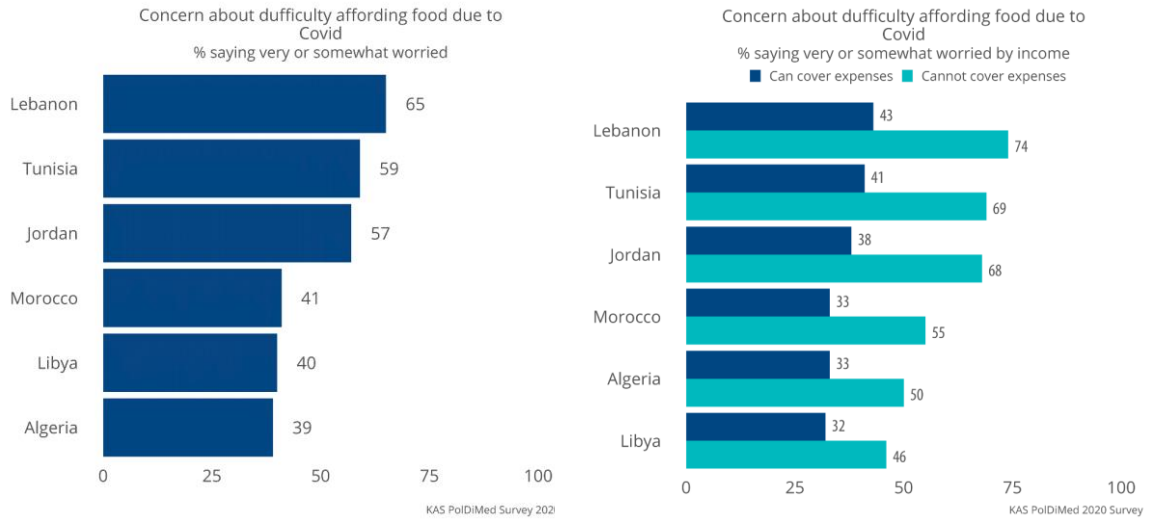
As with general concern about COVID, the surveys find that women are often more concerned about losing a family member to COVID compared with men. In Tunisia, the difference is 21 points, while it is nine points in Jordan and five points in Libya. Notably, there are not consistent differences by age, income or level of education.

A second potential concern related to COVID relates to its effect on one’s personal economy. Across the region, majorities fear this possibility in all countries surveyed. However, Jordanians (85 percent) and Lebanese (83 percent) are the most likely to say they are very or somewhat worried about negative effects on the finances of their household. Meanwhile, about three-quarters of Tunisians (73 percent) say the same. Those in Algeria (58 percent), Morocco (57 percent), and Libya (53 percent) are somewhat less likely to harbor this concern about their household economy. Overall, the level of concern appears to correspond somewhat to the relative economic conditions prior to the pandemic. In surveys conducted by Arab Barometer in 2018-19, economic ratings were among the lowest in Tunisia and Lebanon in 12 countries surveyed. Accordingly, it is concerning that these citizens are some of the most worried given the poor economic conditions they were enduring prior to the outbreak of COVID.



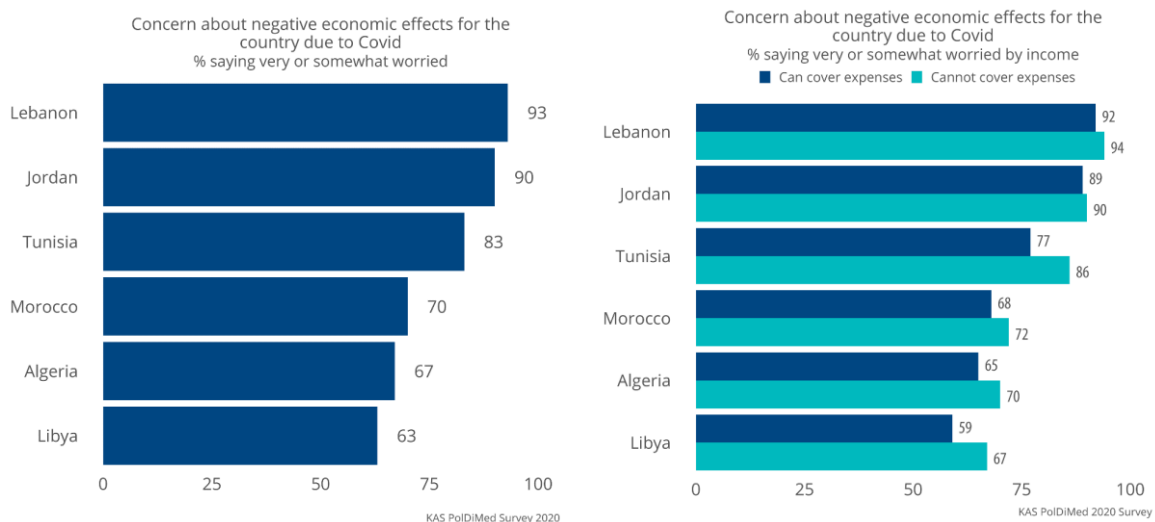
Perhaps unsurprisingly, concern about one’s personal finances is not shared equally across society. Those who are poorer, which is measured by the ability to cover their basic expenses or not, are significantly more likely to worry about the financial effects of COVID. Significant differences are found in all countries, including 23 points in Lebanon, 19 points in Tunisia, 16 points in Morocco, eleven points in Jordan and Algeria, respectively, and ten points in Libya.

Not only does a majority of citizen’s fear COVID will have negative effects on their personal economy, many also are concerned that they may not be able to afford even basic necessities like food due to the pandemic. In Lebanon, nearly two-thirds (65 percent) say they may not be able to afford food as does more than half in Tunisia (59 percent) and Jordan (57 percent). Fear is somewhat lower in Morocco (41 percent), Libya (40 percent), and Algeria (39 percent), where a minority is worried about this possibility. Although concern about this possibility is lower than for other potential challenges, the fact that at least four-in-ten citizens in all countries think it is possible they may not be able to afford food as a result of the pandemic speaks to the severe vulnerability of MENA’s populations. Additional assistance is clearly needed to ensure citizens have the basic necessary provisions to endure this ongoing crisis.



As before, citizens who are poorer are far more likely to say they worry about their ability to afford food. Two-thirds or more of those who are struggling financially in Lebanon (74 percent), Tunisia (69 percent) and Jordan (68 percent) believe they are at risk of not being able afford food due to COVID, while around half say the same in the other countries surveyed. In all countries, poorer citizens are at least ten points more likely to worry about affording food than those who are better off. Additionally, women are somewhat more likely than men to worry more about affording food, including by eleven points in Tunisia, six points in Libya, and five points in Lebanon and Morocco, respectively.

While personal economy matters and remains a major problem, citizens are even more worried about the effect of COVID on the national economy. In all countries surveyed, at least six-in-ten are very or somewhat worried that the pandemic will have a negative economic outcome at the national level. Again, Lebanese (93 percent) and Jordanians (90 percent) are the most concerned about this possibility, followed closely by Tunisians (83 percent). These results again highlight the precarious position for both economies even before the outbreak of COVID. Meanwhile, 70 percent of Moroccans, 67 percent of Algerians, and 63 percent of Libyans say the same, highlighting the deep concern about this issue across the region.



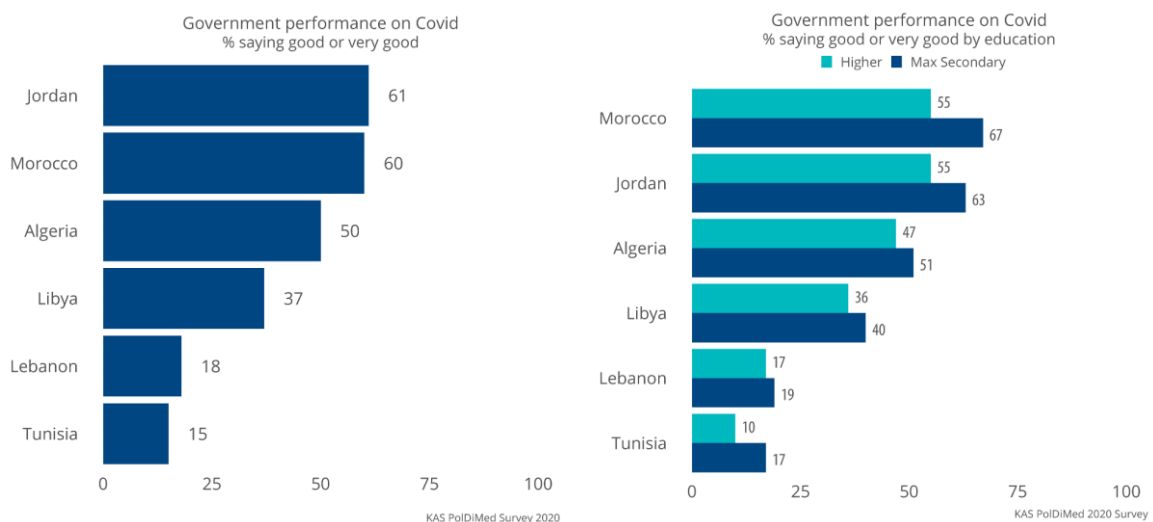
Unlike personal economy, differences in concern about the country's economy are fall smaller by level of income. Although those who are poorer are typically more likely to worry about the national economy, majorities of those who are better and worse off say they are concerned about this possibility in all countries surveyed. Tunisia exhibits the largest gap at nine points, followed by eight in Libya, and five points in Algeria. However, in the remaining countries the difference is not substantial. In effect, there is broad concern across society about the overall effects of COVID on their country's economic future.

Government Performance

Levels of concern about COVID, including its health and economic implications, are strongly linked with perceptions about how the government is handling the crisis.¹ The percentage of those who say the government is doing a good or very good job is just 18 percent in Lebanon and 15 percent in Tunisia. In contrast, ratings of government performance are far higher in Jordan (61 percent), Morocco (60 percent) and Algeria (50 percent), while Libya falls between the other countries (37 percent). These differences are largely consistent with relative rates of infection across these countries. In the time before the survey was conducted, the number of cases per capita was significantly lower in Morocco and Algeria than in Tunisia and Lebanon, which appears reflected in public attitudes about how governments are managing the crisis.

Jordan is the primary exception in this regard, with among the highest levels of concern about COVID (90 percent), but also high ratings of government performance managing the pandemic (61 percent). Likely, this is the result of the government's initial strong actions to contain the outbreak in spring 2020. Although infection rates had risen sharply in the months before the survey, which likely led to high levels of concern for the future, many Jordanians appear to believe the government has handled the crisis well overall.

The result in Jordan and other countries in the region underscores that citizens appear accepting of a strong approach to addressing the problem, including stringent lockdowns, and credit the government for these actions despite the serious disruptions to normal life that have resulted from such strategies.



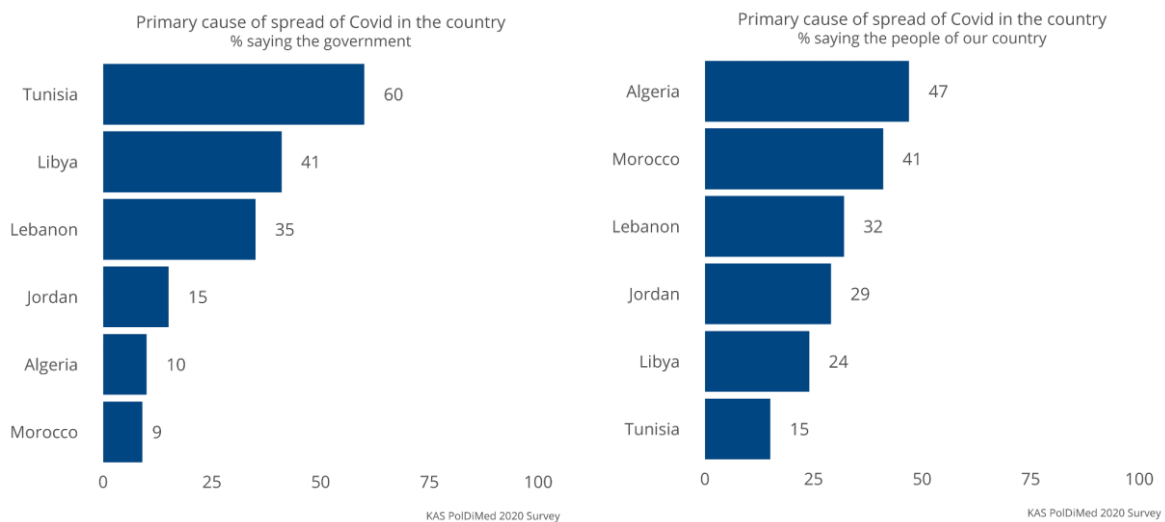
Views of government performance do not vary consistently by age or income levels, but there is some evidence that those with a university education are less likely to approve of the government's efforts than those who have lower levels of education. Significant differences are found in Morocco (-12 points), Jordan (-8 points), and Tunisia (-7 points), for example. It may be that those who are better

¹ See [10 Years after the Arab Uprisings: Where does Public Opinion in the Region Stand Today?](#)

educated are more likely to view government efforts critically or that they are better informed about current events and thus less likely to rate the government positively in light of the ongoing second wave of infections. If the latter is true, then it suggests that satisfaction with government performance on COVID may have decreased after the time of the survey as the true scale of the pandemic became more evident to all citizens.

Additionally, perceptions of government performance are also linked with how citizens apportion blame for the crisis. Although COVID originated abroad, few Arab citizens blame external actors for the pandemic. In all countries surveyed, less than one-in-ten blame Western countries while at most one percent blame China. Instead, the vast majority blame the spread in their country on either their government or their country's citizens.

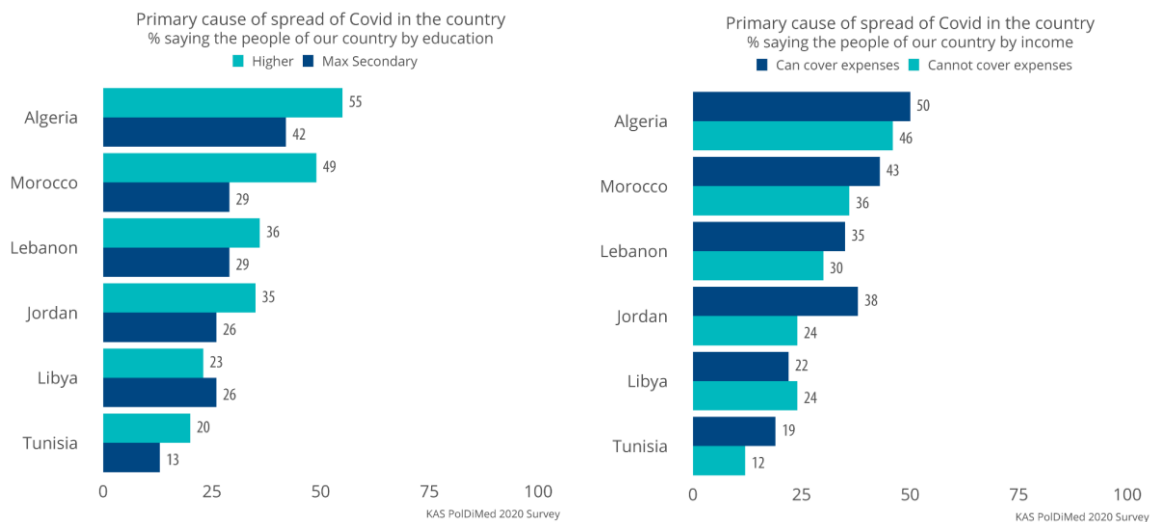
However, there is a stark divide across the region. In Tunisia, blame is squarely placed on government actions, with 60 percent saying government actions are primarily responsible for the spread of the virus. Tunisians appear to blame the government for not stopping the spread by lifting COVID-related restrictions in June and keeping the airport and borders open. In contrast, just 15 percent blame the country's citizens despite the fact that, according to an Arab Barometer survey from July 2020, Tunisians were by far the least likely public across MENA to wear facemasks or take additional precautions to prevent the spread of the virus.



In Lebanon, views are more divided. Although 35 percent blame the government, a similar percentage (32 percent) say that citizens are primarily to blame. It appears that the relatively limited actions taken by the government and the reluctance of some citizens to take health warnings seriously are most likely to have produced this division. In Libya, the citizens are also divided, although a larger percentage blame the government (36 percent) than the citizens of the country (21 percent).

Meanwhile, Moroccans and Algerians are far more likely to blame their fellow citizens than their governments. The plurality (46 percent) of Algerians thinks the actions of the people are to blame compared with 41 percent in Morocco. In both countries, roughly one-in-ten point to the government's actions as the main reason for the virus's spread. In Algeria, the government instituted a five-month lockdown across the majority of the country's *wilayas* (provinces), but as soon as it was lifted Algerians flocked to public places like the beach. Meanwhile, Morocco implemented a new set of lockdown measures in September 2020, which helped contain the number of cases throughout the fall when rates were increasing globally. It appears that these strong actions have been supported by their populations, leading to a broad sense that the government is not to blame for the virus's spread and the relatively higher ratings of government performance on COVID in these countries.

Despite these differences across the region, within countries there are not consistent demographic differences by age, gender, or socio-economic status for apportioning blame to the government. The same is not true for blaming the citizens of one's country. In this case, those who are better educated and wealthier are more likely to point the finger at the public at large. Those with a university education are more likely to do so in Morocco (+20 points), Algeria (+13 points), Jordan (+9 points), and Lebanon (+7 points). Similarly, those whose incomes cover their expenses are more likely than those who cannot to blame the country's citizens in Jordan (+14 points), Morocco (+7 points), and Lebanon (+5 points). In other words, those who may be better able to isolate and follow health guidelines without risking their livelihoods appear more likely to blame citizens who may not be able to do the same for the spread of the virus.



Conclusion

Overall, these results paint a challenging picture. Citizens across MENA are deeply concerned about COVID, although it is not the principal concern compared with other issues they are facing. Still, levels of concern are alarming, including fears about health and economic conditions with majorities fearing the effects of COVID on both fronts. This is especially true for women and marginalized groups, who appear to be suffering disproportionately based on the results of the survey.

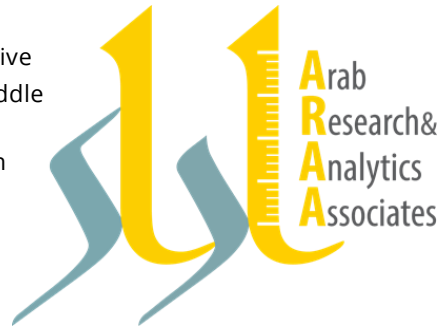
Yet, these findings offer some clear hope. Many citizens credit their government for doing a good job managing the crisis, which appears linked with overall levels of trust in the government.² Given citizens across MENA have become less likely to trust their governments over the past decade, the relatively strong performance of some governments, at least in the eyes of their citizens, could offer an opportunity to reset this relationship. However, governments should also be aware that there are a significant number of citizens who blame them for the overall spread of the virus. If government measures prove ineffective in stopping the spread, then it is possible that more citizens will lose confidence in their leadership.

These findings also highlight the deep need for domestic and international assistance for citizens in the region. As governments struggle to provide aid given economic losses from COVID, there is a clear role for the international community to step in to fill this gap. Some, such as China, have made public displays of providing assistance. Western countries should continue to provide support for citizens in these countries to help them address the ongoing challenges brought on by the pandemic, including by providing aid and technical support to governments seeking to stop its spread.

² See [10 Years after the Arab Uprisings: Where does Public Opinion in the Region Stand Today?](#)

Conducted by:

Arab Research and Analytics Associates (ARAA) is a collaborative team of analysts specializing in public opinion research in the Middle East and North Africa. Its team combine decades of experience surveying this region in more than 20 countries. ARAA works with its clients to gather reliable and accurate data on public opinion across the region. ARAA has conducted surveys on behalf of Konrad-Adenauer-Stiftung, Stanford University, and Deakin University, among others. For more information, visit www.araaconsulting.com or contact info@araaconsulting.com.



About KAS PoDiMed:

The **Regional Program Political Dialogue South Mediterranean** of the **Konrad-Adenauer-Stiftung (KAS PoDiMed)** implements transnational projects from Tunis with reference to the entire area of the southern (Maghreb) and eastern Mediterranean (Mashrek). It is designed to strengthen political dialogue, social and economic integration in the region and to promote long-term partnership with the European Union. The Konrad-Adenauer-Stiftung is a non-governmental German political foundation with over 100 offices worldwide and 12 programs in the MENA region. Nationally and internationally, we work for peace, freedom and justice through political education. The consolidation of democracy and development cooperation are our particular concerns. For more information, visit www.kas.de/poldimed or contact info.poldimed@kas.de.



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