

# OPEN NEIGHBOURHOOD

Communicating for  
a stronger partnership:  
connecting with citizens  
across the Southern  
Neighbourhood

OPINION POLL  
SOUTHERN COUNTRIES  
FOURTH WAVE REPORT  
2019



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## INTRODUCTION AND METHODOLOGY

### 1. Introduction

The European Union has a long history of cooperation programmes with its neighbours, governed by the European Neighbourhood Policy (ENP). The ENP was launched in 2003 and has been reviewed several times in the intervening years, and most recently in 2015. The most recent revisions put the stability of the EU's neighbours in political, economic and security terms at the heart of the ENP. The revised policy strongly emphasises two principles. The first is applying tailored approaches to better respect the different aims of partner countries as well as to better answer the interests of both the EU and partner countries. The second, is increasing ownership by both partner countries and Member States. Work carried out under the auspices of this policy is funded primarily through the European Neighbourhood Instrument, with most funding used to enhance bilateral cooperation, and fund projects which are tailor-made to each Neighbourhood partner country<sup>1</sup>.

The project 'OPEN Neighbourhood - Communicating for a stronger partnership: connecting with citizens across the Southern Neighbourhood' (CSP South project) was launched in November 2015, and is one of the three projects to be implemented as part of the Regional Communication Programme 'OPEN Neighbourhood: opportunities, participation, engagement and networking with people from the Southern Neighbourhood area (Regional Communication Programme phase II)'<sup>2</sup>.

The general aim of CSP South is to improve the public perception of the EU in this region, as well as to increase the understanding of European policies and the support the EU provides to its partner countries in the Southern Neighbourhood area.

The current study commenced in 2016 and has been designed to assess the current levels of awareness among the general public about EU support in the Southern Neighbourhood countries, as well as public attitudes towards, and perceptions of the EU in these countries<sup>3</sup>. A key focus of the study are the differences between countries in the Maghreb<sup>4</sup> and the Mashrek<sup>5</sup>.

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<sup>1</sup> [https://ec.europa.eu/neighbourhood-enlargement/neighbourhood/overview\\_en](https://ec.europa.eu/neighbourhood-enlargement/neighbourhood/overview_en)

<sup>2</sup> Southern Neighbourhood partner countries are Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia.

<sup>3</sup> Excluding Syria, Libya and Egypt

<sup>4</sup> Algeria, Morocco, Tunisia

<sup>5</sup> Israel, Jordan, Lebanon, Palestine

This report presents the results of the fourth wave of this survey, conducted in Summer-Autumn 2019. Areas covered by this survey include:

- Perceptions of, and attitudes towards the EU;
- Awareness of financial support provided by the EU, and the main areas of cooperation with the EU;
- Use of traditional and Internet-based media, and the EU's media profile;
- The general mood of respondents in Southern Neighbourhood countries, including their opinions about current and future employment, economic and general life situations.

## 2. Methodology

Between June and September 2019, a consortium led by Stantec conducted opinion polls in the EU Southern Neighbourhood countries, as part of the project entitled 'OPEN Neighbourhood - Communicating for a stronger partnership: connecting with citizens across the Southern Neighbourhood' on behalf of the European Commission's Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR).

The survey was designed, managed and coordinated by Kantar Belgium, Public Division.

This report presents the results of the opinion polls conducted in seven<sup>6</sup> of the ten EU Southern Neighbourhood countries.

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<sup>6</sup> Since May 2011, the European Commission has suspended any type of cooperation with the Syrian Government. For this reason, it has been decided not to conduct the survey in this country.

Libya has not been covered due to constant insecurity situation in the country. In Egypt, the survey was not conducted as part of this wave.



In total, 7085 respondents were interviewed face-to-face.<sup>7</sup> The survey covers the population aged 15 years and over in the following countries:

South		Institute	No of interviews	Fieldwork	
				Start	End
DZ	Algeria	Newvision Research	1040	22/07/19	04/09/19
IL	Israel	PCPO / Maagar Mohot	1000	20/06/19	19/07/19
JO	Jordan	Statistics Lebanon / Brand Vision	1000	05/07/19	23/07/19
LB	Lebanon	Statistics Lebanon	1000	01/07/19	23/07/19
MA	Morocco	TNS Maroc	1031	03/07/19	15/08/19
PS	Palestinian territories	PCPO	1000	22/06/19	22/07/19
TN	Tunisia	El Amouri Institute	1014	14/08/19	16/09/19

Broad national demographic quotas on the following parameters were set to ensure all subgroups of the universe of interest are adequately represented (source: national statistics offices) on the following variables:

- Gender;
- Age (15-24, 25-39, 40-54, 55-64, older than 65);
- Education (if information is available);
- Region;
- Urbanisation (if information is available).

A national weighting procedure, using marginal and intercellular weighting, was carried out so that the samples match the target universes. In all countries, the above variables except education were introduced in the iteration procedure. Two population weighting factors have also been established (for Maghreb and for Mashrek)<sup>8</sup>, taking into consideration the respective sizes of national 15+ populations in the group of countries in question.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage.

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<sup>7</sup> The survey uses nationwide representative samples, based on national statistics, and applies a random selection of respondents. In Algeria, the political situation did not allow for random selection. Respondents were selected by street-intercept method according to quotas based on national statistics

<sup>8</sup> Maghreb includes Algeria (DZ), Morocco (MA), Tunisia (TN); Mashrek includes Israel (IL), Jordan (JO), Lebanon (LB), Palestine (PS)

## KEY FINDINGS

### 1. Perceptions of the European Union

#### Information about and image of the EU

- Respondents in the Mashrek (51%) are more likely to say they feel well informed about the European Union, compared to those in the Maghreb (44%).
  - Respondents in the Maghreb are now less likely to have a positive image of the EU than they were in Autumn 2018 (-9 percentage points to 46%), while those in the Mashrek are now more likely to be positive (+5 pp to 50%).
- There is almost no difference between the Maghreb (36%) and the Mashrek (37%) in the proportion who are aware of the EU embassy in their country.
- In Maghreb countries, respondents are most likely to say the EU represents individual freedom (77%), human rights (75%), equality between women and men, freedom of speech or media freedom (both 74%), the rule of law/transparency or economic prosperity (both 71%).
- In the Mashrek, respondents are most likely to say that democracy (69%), equality between women and men, individual freedom, human rights (all 68%), freedom of speech or media freedom, or economic prosperity (both 65%) represent the EU.

#### Relations with the EU and key areas of cooperation

- More than six in ten respondents in the Maghreb (63%) and the Mashrek (67%) say the EU has a good relationship with their country.
  - Respondents in Maghreb countries are now much less likely to be positive about the EU's relationship with their country than they were in Autumn 2018 (-11 pp).
- Respondents in the Maghreb are most likely to say the European Union is the closest partner to their country (34%), while in the Mashrek respondents are much more likely to mention the United States (45%) than other countries. Respondents in Mashrek countries (51%) are more likely to trust the European Union than those in Maghreb countries (41%). In fact, trust in the EU has declined 12 points since Autumn 2018 in Maghreb but increased six points in Mashrek.
  - Respondents in both groups of countries are less likely to trust the Arab League or the United Nations.
- There is little difference between Maghreb and Mashrek countries in the proportions of respondents who agree that the European Union has the appropriate level of involvement in their country (48% vs 53%), or in the region surrounding their country (49% vs 54%).
- However, respondents in the Mashrek are more likely to agree that the European Union brings peace and stability in the region surrounding their country than respondents in the Maghreb (Maghreb: 42%, Mashrek: 47%); that the support of the European Union contributes a lot to the development of their country (Maghreb: 49%, Mashrek: 54%); that the European Union is an important partner of their country (Maghreb: 55%, Mashrek: 61%); or that their country and the European

Union have sufficient common values to be able to cooperate (Maghreb: 56%, Mashrek: 66%).

- Respondents in Maghreb countries are now less likely to agree that the European Union brings peace and stability in the region surrounding their country than they were in Autumn 2018 (-9 pp).
- In Maghreb countries, respondents most often say that their country has benefited from EU support in the areas of trade (35%) and tourism (31%). In Mashrek countries the most mentioned areas are tourism, economic development (both 26%) and education (25%).
- In both Maghreb and Mashrek countries, the majority of respondents think the European Union has a positive influence on the development of their country, although respondents in the Mashrek are more likely to say this (61% vs 52%).
- Respondents in the Maghreb are most likely to think the EU should have a greater role to play in trade (71%), human rights (68%), migration, economic development and education (all 61%) in their country. The most mentioned areas in the Mashrek are economic development (70%), trade (68%) and human rights (63%).

### **EU financial support**

- Awareness of the financial support the EU gives to countries in the Southern Neighbourhood is much higher in the Mashrek (46%) than in the Maghreb (26%).
  - Amongst respondents who are aware of the EU's financial support to their country, those in the Mashrek are more likely to say this support is effective (78% vs 60% in Maghreb). Respondents in the Mashrek are also more likely to say the support is effective (+9 pp) than they were in Autumn 2018.
  - Amongst respondents who are aware of the EU's financial support to their country 54% in Mashrek countries are aware of programmes funded by this financial support in their country, compared to 27% in the Maghreb.
  - For respondents who are aware of EU funded programmes, health (31%), education (29%) and cultural programmes (25%) are the most mentioned in Maghreb countries, while in Mashrek countries education programmes (53%), infrastructure development projects (41%) and health programmes (40%) are the most mentioned.
  - Only a minority of the respondents in Maghreb (10%) or Mashrek countries (19%) have been personally involved in an EU-funded project.
- In the Maghreb, the IMF/World bank (30%) is the only institution or country which at least one in five respondents thinks provides more financial support to their country than the EU – a 12-point increase since Autumn 2018.
- In the Mashrek almost half (48%) think the United States provides more financial support to their country than the EU

## 2. Information on the European Union

- Just over four in ten (44%) respondents in countries of the Maghreb and 50% in the Mashrek say they look for information on the European Union.
  - Amongst respondents who look for this information, those in Maghreb countries are most likely to turn to television (39%), books, brochures and information leaflets (26%) or radio (23%). In the Mashrek the most mentioned sources are the European Union's official website, Europa (39%), online social networks (30%) and television (25%).
  - In the Maghreb, respondents most often look for economic and financial information, visa information, information concerning cooperation with their country (each 26%). In the Mashrek they most often look for economic and financial information (36%), information concerning cooperation with their country (32%) or political information (26%).
  - Although the majority of respondents find the information they are looking for, respondents in the Mashrek (75%) are much more likely to say this than those in the Maghreb (54%). Respondents in the Maghreb are now much less likely to find what they were looking for than in Autumn 2018 (-13 pp).
- Only a small proportion of respondents in either group of countries have visited official EU sites or online accounts, with respondents in both groups of countries most likely to have visited the EU Facebook page (Maghreb: 16%, Mashrek: 21%).
- Respondents in Mashrek countries (87%) are more likely than those in Maghreb countries (73%) to say national websites have an important role in influencing public opinion, but the differences are smaller for national TV (Maghreb: 80%, Mashrek: 85%), national radio (Maghreb: 61%, Mashrek: 65%), or the national printed press (Maghreb: 59%, Mashrek: 64%).
- In general, respondents are most likely to think the national media talks the right amount about the EU
  - In Maghreb countries, respondents are most likely to say national websites talk too much (35%) about the EU, but they also are most likely to say national TV (31%), printed press (32%) and radio (31%) talk about the right amount about the EU.
  - In Mashrek countries, respondents most often say each type of media talks the right amount about the EU: TV (48%), websites (45%), printed press (41%) and radio (39%).
- Respondents in both groups of countries are most likely to say the EU has a positive image in national media.
  - In the Maghreb, 59% say this about TV, 41% about radio, 42% about the printed press and 51% about national websites.
  - In the Mashrek, 54% say this about TV, 41% about radio, 38% about the printed press and 49% about national websites.

## Media habits

- Respondents in the Maghreb are most likely to get their news on national political matters from private TV channels (45%), public TV channels (39%) or online social networks (36%). In the Mashrek the most mentioned sources are online social networks (50%), the Internet (49%) and private TV channels (45%).
- In Maghreb countries, the most trusted sources of news on political matters are public TV channels (19%), private TV channels (18%) and online social networks (17%). In Mashrek countries the most trusted are the Internet (20%), public TV channels (18%), private TV channels and online social networks (17% each).

## 3. The national and personal situation

- More than two thirds of respondents in Maghreb (71%) and Mashrek (68%) countries say they are satisfied, on the whole, with the life they lead.
- In both Maghreb and Mashrek countries, respondents are most likely to say their current personal job situation is good (Maghreb: 48%, Mashrek: 51%), although in the Maghreb this represents a 14-point decline since Spring 2017.
- Respondents in the Maghreb (70%) are much more likely to be positive about their household's current financial situation than those in the Mashrek (59%).
- In both Maghreb and Mashrek countries, 68% say their life in general is good.
- Respondents in the Maghreb are much more likely think their personal job situation (Maghreb: 45%, Mashrek: 25%), household financial situation (Maghreb: 54%, Mashrek: 28%) and life in general (Maghreb: 56%, Mashrek: 32%) will be better in the next 12 months.
- The majority of respondents in both groups of countries think the current economic situation (Maghreb: 62%, Mashrek: 61%) or employment situation (Maghreb: 71%, Mashrek: 67%) in their country is bad.
- Respondents in the Maghreb are much more likely to be optimistic about the economic (49% vs 17% in Mashrek) or employment (44% vs 16%) situation in their country in the next 12 months.
- In the Maghreb, respondents think corruption (65%), unemployment (64%), rising prices/inflation (45%), crime (43%) and housing (42%) are the most important issues facing the country. In Mashrek countries the most mentioned issues are the economic situation (62%), unemployment (51%) rising prices/inflation (48%) and corruption (44%).

## I. PERCEPTIONS OF THE EUROPEAN UNION

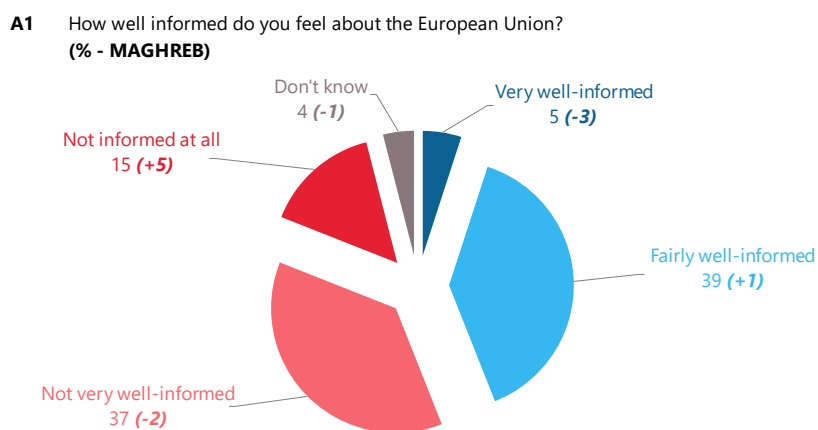
This section of the report discusses some of the ideas respondents have about the European Union. Topics covered include: how well informed they feel about the EU; their image of the EU; the characteristics they think best represent the EU; and their opinions about the relationship their country has with the EU. Views about the EU as a partner are also considered, as are areas where respondents think their country has most benefited from EU policies are discussed. The final part of this section reviews the level of awareness about EU funding for projects in the respondents' country.

### 1. Information about and image of the European Union

#### Information about the European Union

Respondents in the Mashrek are more likely to say they feel well informed about the European Union, compared to those in the Maghreb<sup>9</sup>. In the Maghreb, 44% say they feel well informed, although only 5% say they feel 'very well-informed'. In the Mashrek 51% say they feel well informed, with 11% saying they feel very well-informed.

There has been little change in the proportion of respondents who say they feel informed in Maghreb since the previous wave in the summer of 2018 (-2 pp), but there has been a seven percentage point increase in the proportion in the Mashrek who say they feel well informed.

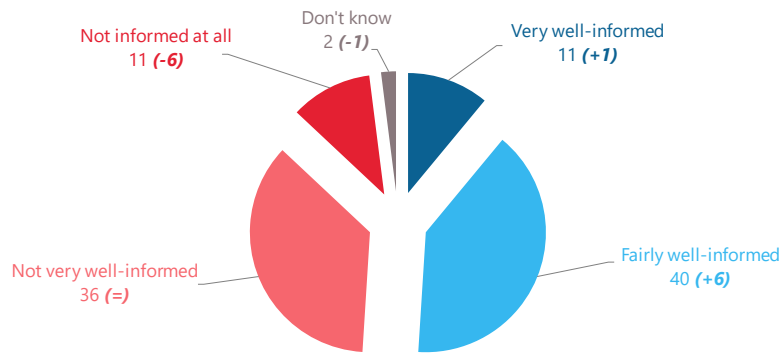


(Autumn 2019 - Autumn 2018)

Base: respondents Maghreb (N=3085)

<sup>9</sup> A1. How well informed do you feel about the European Union?

**A1** How well informed do you feel about the European Union?  
 (% - MASHREK)

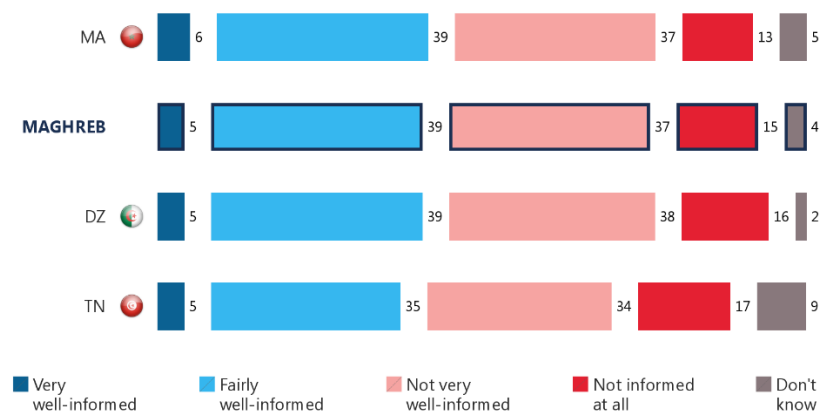


(Autumn 2019 - Autumn 2018)

Base: respondents Mashrek (N=4000)

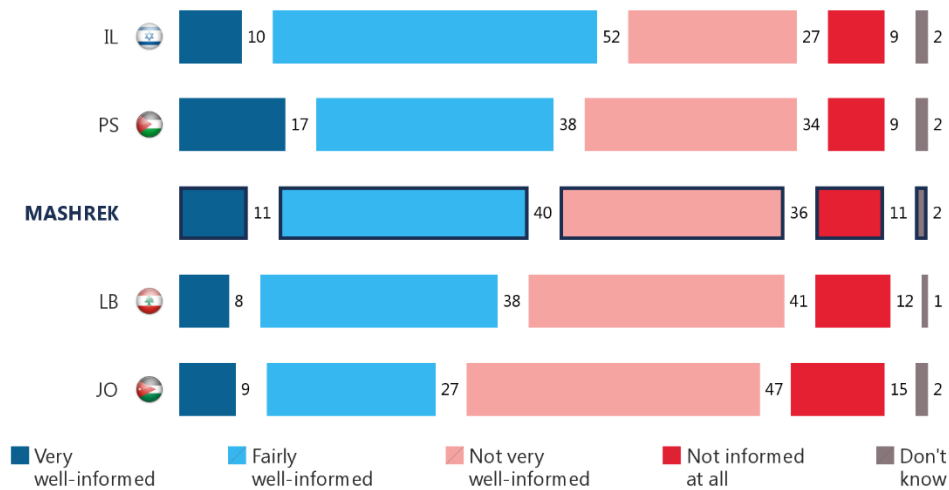
In Maghreb countries, there is relatively little difference between countries in the proportion who say they feel well-informed: it ranges from 40% in Tunisia to 44% in Algeria and 45% in Morocco. There is much more variation in Mashrek countries. The majority in Israel (62%) and Palestine (55%) say they feel well-informed, compared to 46% in Lebanon and 36% in Jordan.

**A1** How well informed do you feel about the European Union?  
 (%)



Base: respondents Maghreb (N=3085)

**A1** How well informed do you feel about the European Union? (%)



Base: respondents Mashrek (N=4000)

The country trends show little change in most countries in the Maghreb compared to 2018, although in Tunisia the proportion who say they feel well-informed has declined eight points. In the Mashrek, on the other hand, respondents in Jordan (+12 pp) and Israel (+10 pp) are now much more likely to say they feel well-informed.

**A1** How well informed do you feel about the European Union? (%)

	Total 'Well-informed'	Aut. 2019 - Aut. 2018	Total 'Not informed'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
<b>MAGHREB</b>	44	▼ 2	52	▲ 3	4	▼ 1
MA	45	▼ 2	50	▲ 1	5	▲ 1
DZ	44	▼ 2	54	▲ 4	2	▼ 2
TN	40	▼ 8	51	▲ 5	9	▲ 3

Base: Respondents Maghreb (N=3085)

**A1** How well informed do you feel about the European Union? (%)

	Total 'Well-informed'	Aut. 2019 - Aut. 2018	Total 'Not informed'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
<b>MASHREK</b>	51	▲ 7	47	▼ 6	2	▼ 1
JO	36	▲ 12	62	▼ 11	2	▼ 1
IL	62	▲ 10	36	▼ 9	2	▼ 1
LB	46	=	53	=	1	=
PS	55	▼ 2	43	▲ 4	2	▼ 2

Base: Respondents Mashrek (N=4000)

The socio-demographic analysis reveals the following:

- In both **Maghreb** and **Mashrek** countries, men are more likely to say they feel well informed, compared to women. For instance, in the Maghreb 51% of men say they feel well-informed, compared to 37% of women.
- In the **Maghreb**, respondents under 55 years of age are more likely to feel well-informed than older respondents. The same pattern does not occur in the Mashrek.









- In both **Maghreb** and **Mashrek** countries, the longer a respondent remained in education, the more likely they are to say they feel well-informed. For instance, in Mashrek countries 61% who completed their education aged 20 or older feel well-informed, compared to 35% who completed their education aged 15 or younger.
- In both **Maghreb** and **Mashrek** countries, respondents living in large towns are more likely to feel well-informed than those living in less urbanised areas. For example, in the Mashrek 55% living in large towns feel well-informed, compared to 45% who live in rural villages.
- In both **Maghreb** and **Mashrek** countries, managers are the occupation group most likely to say they feel well-informed

In addition, in both **Maghreb** and **Mashrek** countries, respondents with relatives living in the EU are more likely to say they feel well-informed, compared to those without relatives in the EU. And finally, in both **Maghreb** and **Mashrek** countries those with a positive opinion of the EU are more likely to say they feel well-informed than those who have a neutral or negative view.

A1

How well informed do you feel about the European Union?







(% - MAGHREB)

	Don't know	Total 'Well-informed'	Total 'Not informed'
MAGHREB	4	44	52
 Gender			
Male	4	51	45
Female	4	37	59
 Age			
15-24 years	4	43	53
25-39 years	3	48	49
40-54 years	5	47	48
55 years or more	8	31	61
 Education (End of)			
15-	5	37	58
16-19	4	46	50
20 or more	1	52	47
Still studying	3	45	52
 Subjective urbanisation			
Rural area or village	5	39	56
Small/mid size town	4	42	54
Large town	4	47	49
 Occupation			
Self-employed	5	54	41
Managers	0	59	41
White collars	3	46	51
Manual workers	4	43	53
House persons	8	35	57
Unemployed	4	37	59
Retired	4	44	52
Students	3	45	52
<b>Relatives living in the EU</b>			
Yes	2	51	47
No	6	36	58
 Opinion of the EU			
Positive	1	62	37
Neutral	2	32	66
Negative	3	35	62

A1

How well informed do you feel about the European Union?

(% - MASHREK)

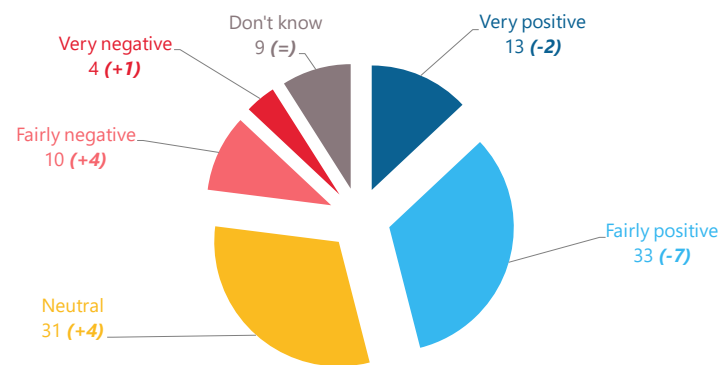
	Don't know	Total 'Well-informed'	Total 'Not informed'
MASHREK	2	51	47
 Gender			
Male	2	56	42
Female	2	46	52
 Age			
15-24 years	3	48	49
25-39 years	1	53	46
40-54 years	2	51	47
55 years or more	1	53	46
 Education (End of)			
15-	2	35	63
16-19	2	52	46
20 or more	1	61	38
Still studying	3	45	52
 Subjective urbanisation			
Rural area or village	3	45	52
Small/mid size town	2	48	50
Large town	2	55	43
 Occupation			
Self-employed	0	60	40
Managers	1	66	33
White collars	2	54	44
Manual workers	3	50	47
House persons	2	40	58
Unemployed	2	45	53
Retired	1	58	41
Students	3	47	50
<b>Relatives living in the EU</b>			
Yes	1	56	43
No	2	49	49
 Opinion of the EU			
Positive	0	62	38
Neutral	1	40	59
Negative	1	49	50

## Image of the European Union

There is little difference between Maghreb and Mashrek countries in the proportion of respondents who say the EU conjures a positive image for them (46% and 50% respectively)<sup>10</sup>. The proportion who are neutral (Maghreb: 31%, Mashrek: 28%) or have a negative image (Maghreb: 14%, Mashrek: 18%) are also similar.

Respondents in the Maghreb are now less likely to have a positive image of the EU than they did in 2018 (-9 pp), while those in the Mashrek are now more likely to be positive (+5 pp).

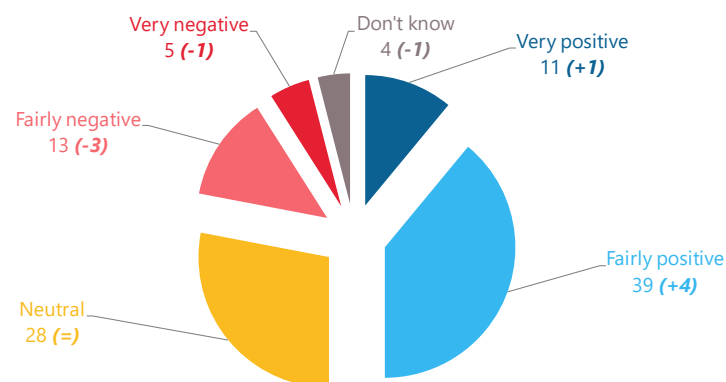
- A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?  
(% - **MAGHREB**)



(Autumn 2019 - Autumn 2018)

Base: respondents Maghreb (N=3085)

- A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?  
(% - **MASHREK**)



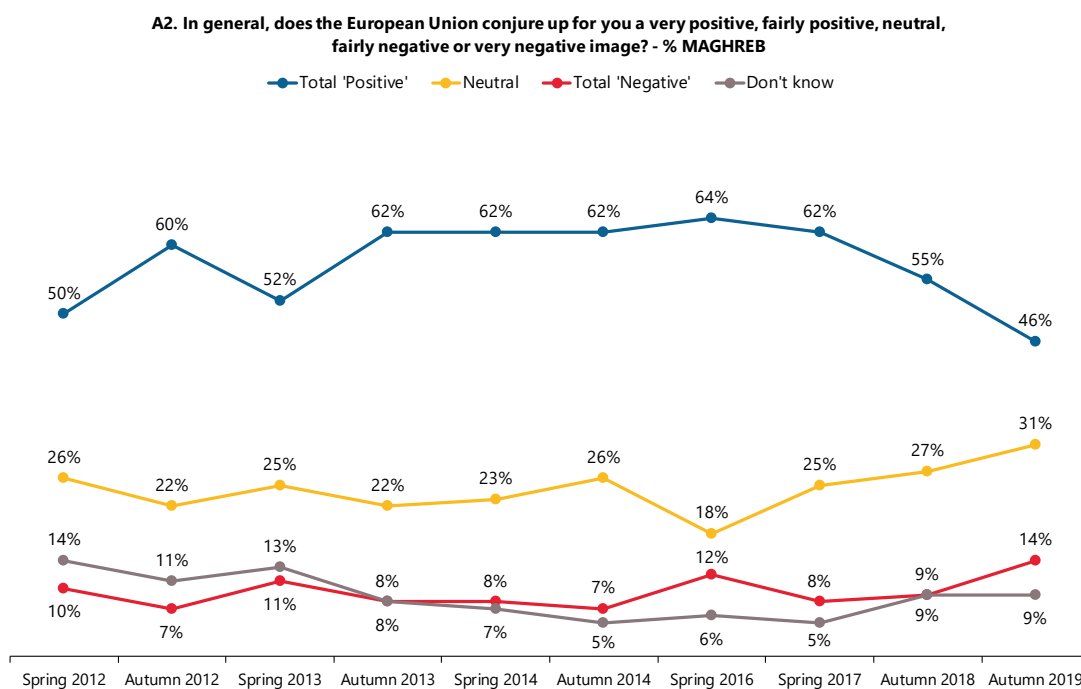
(Autumn 2019 - Autumn 2018)

Base: respondents Mashrek (N=4000)

<sup>10</sup> A2. In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?

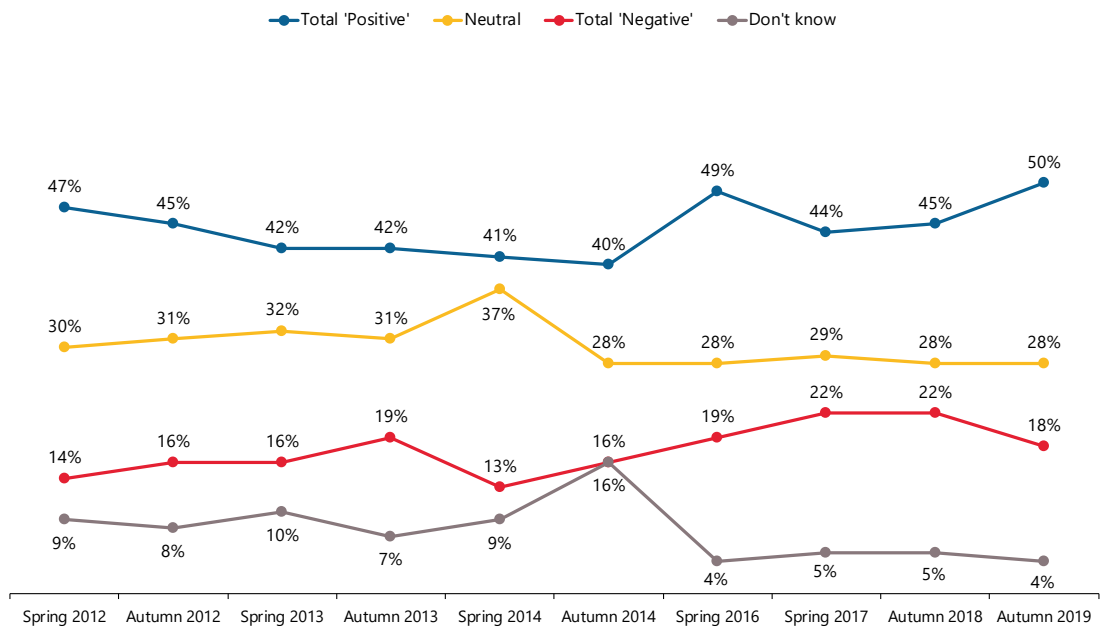
The longer-term trend shows that in the Maghreb, the proportion of respondents with a positive view of the EU has been consistently declining since Spring 2016 and is now at its lowest level. Over the same period the proportion of respondents with a neutral view of the EU has consistently increased: up four points since Autumn 2018 and now at its highest ever level.

In the Mashrek, on the other hand, the proportion of respondents with a positive image of the EU is now at its highest point, while the proportion of respondents who have a negative image of the EU has declined for the first time since Spring 2014.



Base: respondents Maghreb (N=3085)

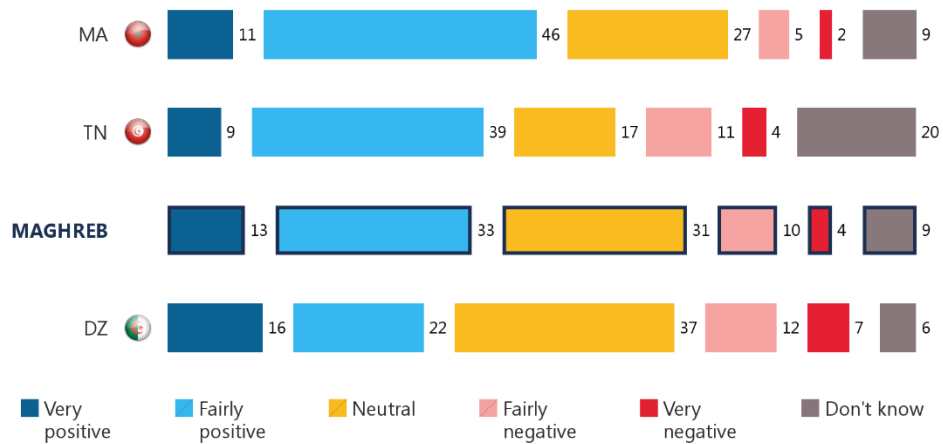
**A2. In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image? - % MASHREK**



Base: respondents Mashrek (N=4000)

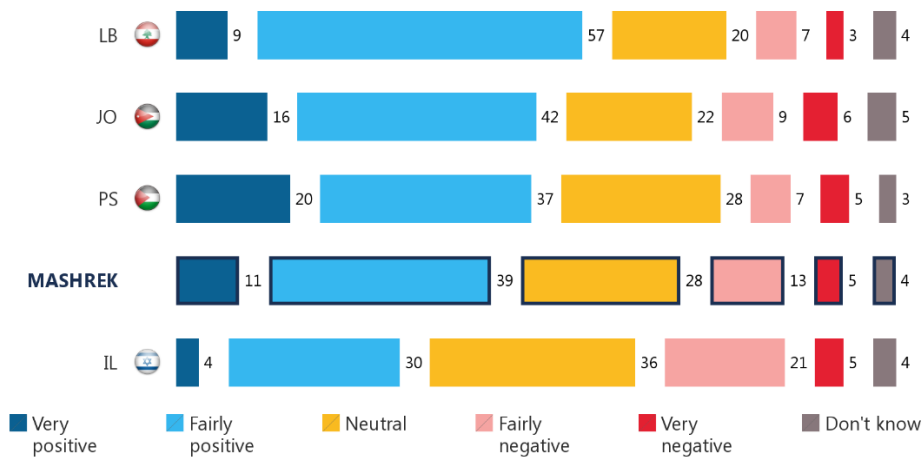
Opinion in both Maghreb and Mashrek countries varies between countries. In the Maghreb, Morocco (57%) is the only country where at least half of respondents have a positive opinion of the EU, compared to 48% in Tunisia and 38% in Algeria. In the Mashrek, more than half of respondents in each country except Israel (34%) have a positive opinion of the EU.

**A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image? (%)



Base: respondents Maghreb (N=3085)

**A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image? (%)






Base: respondents Mashrek (N=4000)

Compared to 2018, respondents in each country in the Maghreb are now less likely to be positive about the EU, but Algeria is the only country where the difference is notable: a 17-point decrease in the proportion of respondents who have a positive image, and an 11-point increase in the proportion of those who have a negative image.





In the Mashrek there has been little change in opinion in Israel and Palestine, but in Jordan (+16 pp) and Lebanon (+9 pp) the proportion of respondents with a positive view of the EU has increased.

**A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?  
(%)

	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	46	▼ 9	31	▲ 4	14	▲ 5	9	=
MA 	57	▼ 2	27	▼ 2	7	▲ 2	9	▲ 2
TN 	48	▼ 2	17	=	15	▼ 7	20	▲ 9
DZ 	38	▼ 17	37	▲ 9	19	▲ 11	6	▼ 3

*Base: respondents Maghreb (N=3085)*

**A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?  
(%)

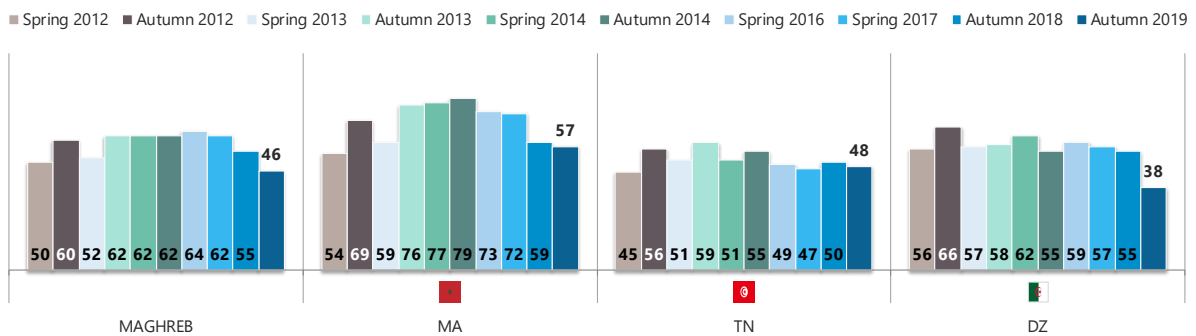
	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	50	▲ 5	28	=	18	▼ 4	4	▼ 1
JO 	58	▲ 16	22	▼ 6	15	▼ 8	5	▼ 2
LB 	66	▲ 9	20	▼ 1	10	▼ 9	4	▲ 1
PS 	57	▲ 3	28	▲ 2	12	▼ 2	3	▼ 3
IL 	34	▼ 2	36	▲ 2	26	▲ 1	4	▼ 1

*Base: respondents Mashrek (N=4000)*

The longer-term trend in the Maghreb shows relatively little variation in Tunisia. Opinion in Algeria, too, was relatively stable until the sharp decline in the current year. In Morocco, the positive view is considerably less widespread than the period from Autumn 2013-Spring 2017, although still higher than the lowest point in Spring 2012.

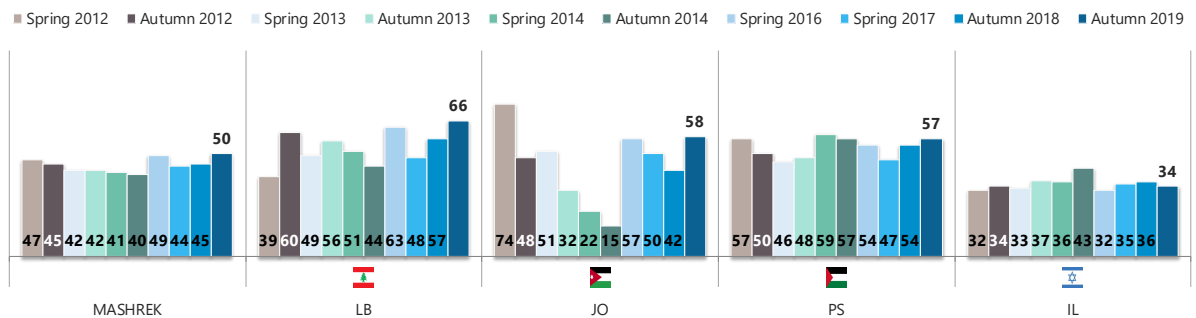
In the Mashrek, opinion has been most volatile in Jordan, although the current results are the highest level of positive opinion since Spring 2012. In Lebanon too the current results are the highest across all survey waves. Opinion in Israel and Palestine, in contrast, has remained relatively stable.

**A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image? (% - TOTAL 'POSITIVE')



Base: respondents Maghreb (N=3085)

**A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image? (% - TOTAL 'POSITIVE')



Base: respondents Mashrek (N=4000)

The socio-demographic analysis illustrates the following:





- In the **Maghreb**, men are more likely to have a positive view of the EU than women (52% vs 42%). There is no difference in Mashrek.
- In the **Maghreb**, respondents aged 55 and older are the least likely to have a positive view (32%) especially when compared to younger cohorts (between 46% and 52%), and similarly in the **Mashrek** respondents aged 15-39 are more likely to have a positive view than older respondents. For example, 54% of those aged 15-24 in the Mashrek have a positive view of the EU, compared to 47% of those aged 55 or older.
- In the **Maghreb**, respondents living in large towns (50%) are the most likely to be positive. The same pattern does not occur in the Mashrek.







In addition, respondents in **both groups of countries** who have relatives who live in the EU are more likely to have a positive opinion of the EU. For instance, in Maghreb 50% of this group have a positive view of the EU, compared to 43% of respondents who don't have relatives living in the EU.

Finally, in both **Maghreb** and **Mashrek countries** respondents who feel well-informed about the EU are more likely to have a positive image than those who do not feel well informed, with the largest difference seen in Maghreb (65% vs. 33%).

**A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?  
 (% - **MAGHREB**)

	Total 'Positive'	Total 'Negative'	Don't know
MAGHREB	46	14	9
 <b>Gender</b>			
Male	52	15	6
Female	42	12	12
 <b>Age</b>			
15-24 years	49	13	4
25-39 years	52	14	5
40-54 years	46	13	13
55 years or more	32	17	20
 <b>Education (End of)</b>			
15-	43	15	13
16-19	47	16	6
20 or more	46	17	5
Still studying	49	14	3
 <b>Subjective urbanisation</b>			
Rural area or village	44	15	10
Small/mid size town	39	15	11
Large town	50	13	8
<b>Relatives living in the EU</b>			
Yes	50	15	5
No	43	13	13
<b>Informed about the EU</b>			
Well-informed	65	12	0
Not informed	33	16	12

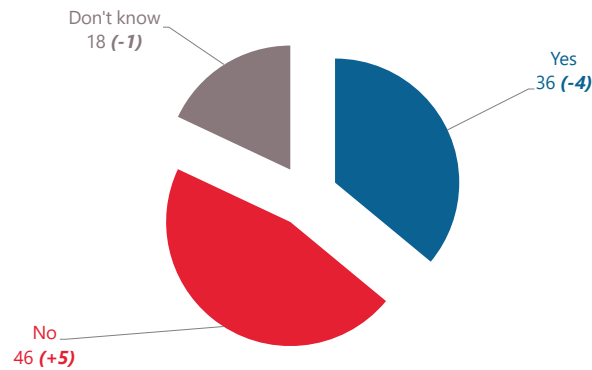
**A2** In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?  
 (% - **MASHREK**)

	Total 'Positive'	Total 'Negative'	Don't know
MASHREK	50	18	4
 <b>Gender</b>			
Male	51	20	4
Female	49	15	5
 <b>Age</b>			
15-24 years	54	14	5
25-39 years	52	17	4
40-54 years	45	20	5
55 years or more	47	22	2
 <b>Education (End of)</b>			
15-	56	14	5
16-19	47	18	4
20 or more	52	18	3
Still studying	52	16	6
 <b>Subjective urbanisation</b>			
Rural area or village	47	20	5
Small/mid size town	53	17	4
Large town	49	17	4
<b>Relatives living in the EU</b>			
Yes	58	16	2
No	48	18	5
<b>Informed about the EU</b>			
Well-informed	60	17	1
Not informed	41	19	5

## Awareness of the existence of the EU embassy

There is almost no difference between Maghreb (36%) and Mashrek (37%) countries in the proportion of respondents who are aware that there is an EU embassy in their country<sup>11</sup>. Compared to 2018 awareness in the Maghreb has declined slightly (-4 pp), while in the Mashrek awareness has increased (+5 pp).

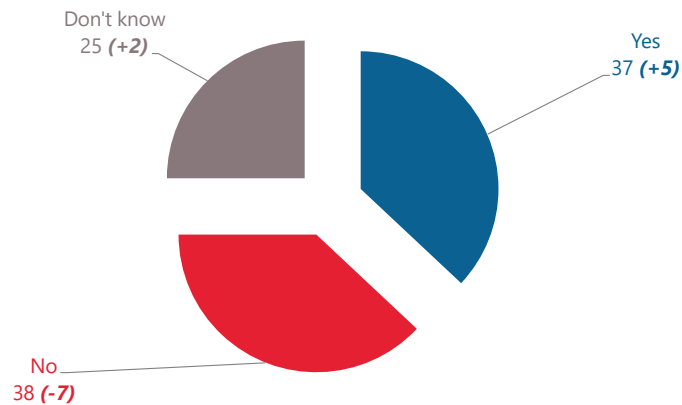
**A18** Are you aware or not that the European Union has an embassy in (OUR COUNTRY)?  
(% - **MAGHREB**)



(Autumn 2019 - Autumn 2018)

Base: respondents Maghreb (N=3085)

**A18** Are you aware or not that the European Union has an embassy in (OUR COUNTRY)?  
(% - **MASHREK**)



(Autumn 2019 - Autumn 2018)

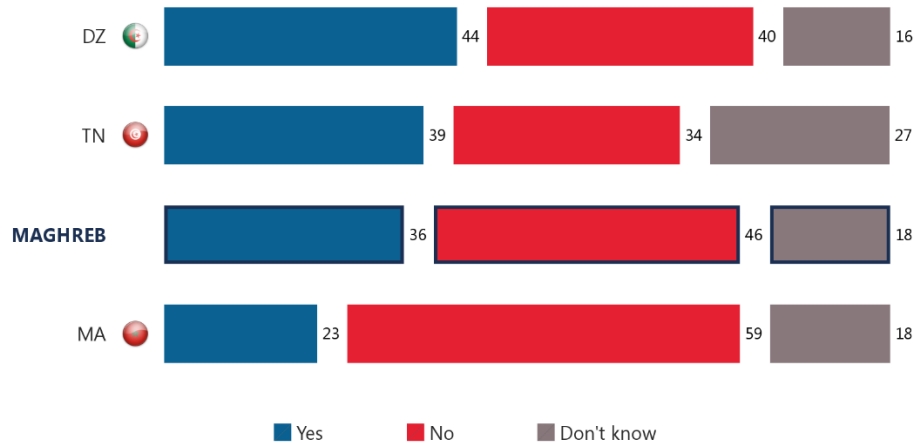
Base: respondents Mashrek (N=4000)

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<sup>11</sup> A18. Are you aware or not that the European Union has an embassy in (OUR COUNTRY)?

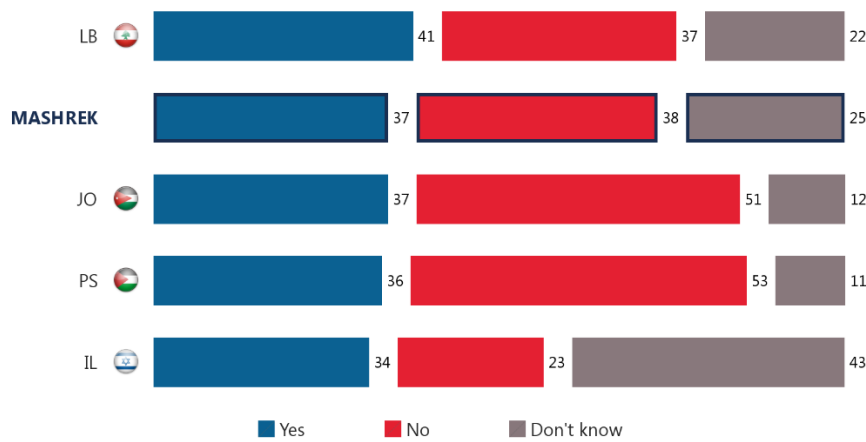
In the Maghreb, only a minority in each country are aware that there is an EU embassy in their country, with awareness highest in Algeria (44%) and lowest in Morocco (23%). In the Mashrek too, only a minority in each country are aware that there is an EU embassy in their country, although the range is smaller: from 41% of respondents in Lebanon to 34% in Israel.

**A18** Are you aware or not that the European Union has an embassy in (OUR COUNTRY)? (%)



Base: respondents Maghreb (N=3085)

**A18** Are you aware or not that the European Union has an embassy in (OUR COUNTRY)? (%)







Base: respondents Mashrek (N=4000)





The socio-demographic analysis highlights that in both Maghreb and Mashrek countries, respondents who are aware of the presence of an EU embassy in their country are most likely to be men, those who completed their education aged 20 or older, those who have relatives living in the EU, those with a positive opinion of the EU or those who feel well-informed about the EU. In addition:

- In the **Maghreb**, respondents aged 55 and over are the least likely to be aware of an EU embassy in their country. For instance, 39% of 40-54 year olds are aware, compared to 28% of those aged 55 or older.

**A18** Are you aware or not that the European Union has an embassy in (OUR COUNTRY)?  
(% - MAGHREB)

	Yes	No	Don't know
MAGHREB	36	46	18
 Gender			
Male	40	43	17
Female	31	49	20
 Age			
15-24 years	34	49	17
25-39 years	38	46	16
40-54 years	39	42	19
55 years or more	28	48	24
 Education (End of)			
15-	33	51	16
16-19	42	43	15
20 or more	40	43	17
Still studying	35	47	18
<b>Relatives living in the EU</b>			
Yes	43	41	16
No	28	51	21
 Opinion of the EU			
Positive	42	43	15
Neutral	33	50	17
Negative	33	52	15
<b>Informed about the EU</b>			
Well-informed	45	43	12
Not informed	29	50	21

**A18** Are you aware or not that the European Union has an embassy in (OUR COUNTRY)?

	Yes	No	Don't know
MASHREK	37	38	25
 Gender			
Male	39	39	22
Female	34	37	29
 Age			
15-24 years	36	41	23
25-39 years	38	39	23
40-54 years	37	37	26
55 years or more	35	34	31
 Education (End of)			
15-	36	46	18
16-19	35	35	30
20 or more	41	35	24
Still studying	35	40	25
<b>Relatives living in the EU</b>			
Yes	42	38	20
No	35	38	27
 Opinion of the EU			
Positive	43	38	19
Neutral	27	38	35
Negative	39	39	22
<b>Informed about the EU</b>			
Well-informed	44	33	23
Not informed	30	43	27

## 2. Characteristics that exemplify the European Union

Respondents were asked the extent to which the European Union represented a number of values<sup>12</sup>.

In Maghreb countries, respondents are most likely to say the EU represents individual freedom (77%), human rights (75%), equality between women and men, freedom of speech or media freedom (both 74%), the rule of law/transparency or economic prosperity (both 71%).

In Mashrek countries, respondents are most likely to say democracy (69%), equality between women and men, individual freedom, human rights (all 68%), freedom of speech or media freedom, or economic prosperity (both 65%) represent the EU for them.

Five values appear in the top six for both groups of countries: equality between women and men, individual freedom, human rights, freedom of speech or media freedom, and economic prosperity. In each case, however, respondents in the Maghreb are more likely to mention each value than those in the Mashrek. The rule of law is the fifth value in the top six in the Maghreb, but not in the Mashrek (71% vs 58% in the Mashrek); while democracy is the first mentioned value in the top six in the Mashrek, but ranks 8<sup>th</sup> in Maghreb, although there is little difference in the proportions (69% vs 68% in the Mashrek).

Looking across the whole range of values shows respondents in Maghreb countries are more likely to mention almost all of them, with the exception of democracy, where there is no difference between Maghreb and Mashrek countries. In particular, respondents in the Maghreb are more likely to mention solidarity (68% vs 55%), honesty (62% vs 49%), freedom of speech (74% vs 65%) and individual freedom (77% vs 68%).

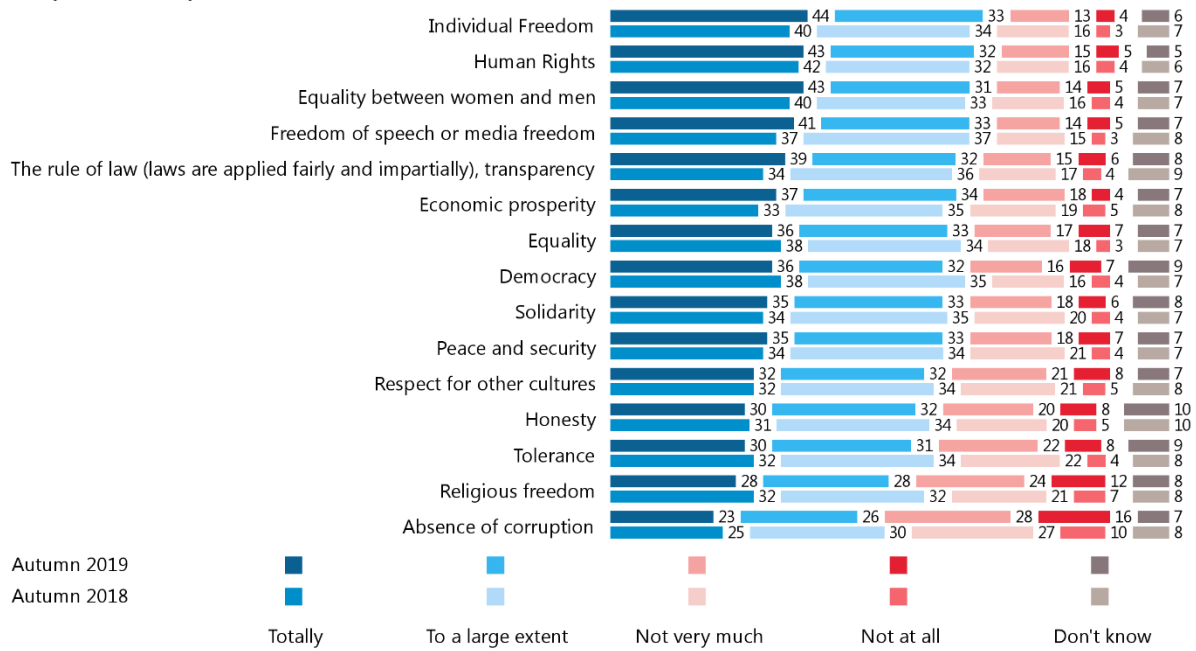
There have been few notable changes in the results in Maghreb since Autumn 2018, with the largest changes all being declines: religious freedom (-8 pp), absence of corruption (-6 pp), tolerance and democracy (-5 pp each). The largest increases are in mentions of individual freedom and economic prosperity (+3 pp each).

Compared to Autumn 2018, respondents in the Mashrek are now more likely to say the EU represents respect for other cultures, peace and security, solidarity or absence of corruption (each +4 pp). Other changes are smaller (0-3 pp).

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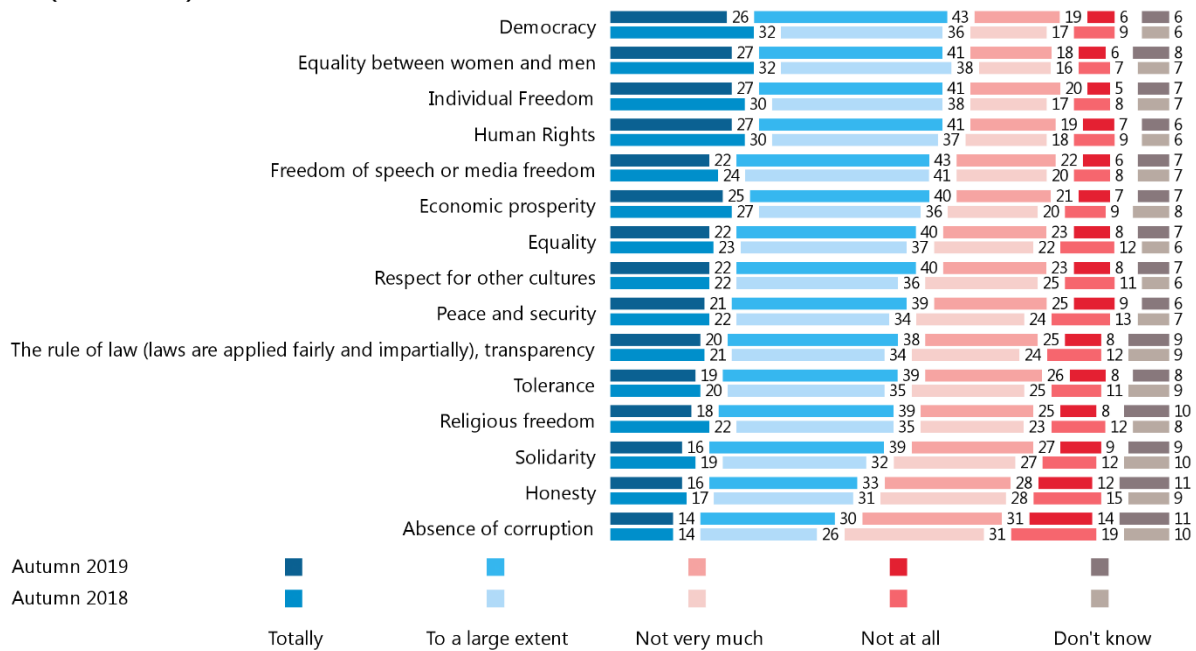
<sup>12</sup> A3 To what extent does the European Union represent the following values for you?

**A3 To what extent does the European Union represent the following values for you?**  
 (% - **MAGHREB**)



Base: Maghreb respondents (N=3085)

**A3 To what extent does the European Union represent the following values for you?**  
 (% - **MASHREK**)



Base: Mashrek respondents (N=4000)

An analysis of the top three values mentioned by respondents in the Maghreb shows respondents in Algeria are the most likely to mention individual freedom or human rights – particularly compared to respondents in Tunisia. Respondents in Tunisia are also less likely to say equality between women and men represents the EU to them, compared to those in Morocco and Algeria.

Compared to Autumn 2018, respondents in Algeria are now more likely to say each of these three values represent the EU, while those in Morocco and Tunisia are now less likely to do so.




**A3.7** To what extent does the European Union represent the following values for you?

**Individual Freedom (%)**

	Total 'Does represent the EU'	Aut. 2019 - Aut. 2018	Total 'Does not represent the EU'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	77	▲ 3	17	▼ 2	6	▼ 1
DZ 	83	▲ 13	12	▼ 9	5	▼ 4
MA 	77	▼ 6	19	▲ 5	4	▲ 1
TN 	57	▼ 7	26	▲ 2	17	▲ 5




**A3.6** To what extent does the European Union represent the following values for you?

**Human Rights (%)**

	Total 'Does represent the EU'	Aut. 2019 - Aut. 2018	Total 'Does not represent the EU'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	75	▲ 1	20	=	5	▼ 1
DZ 	80	▲ 8	16	▼ 4	4	▼ 4
MA 	75	▼ 7	21	▲ 5	4	▲ 2
TN 	56	▼ 8	28	▲ 3	16	▲ 5

**A3.14** To what extent does the European Union represent the following values for you?

**Equality between women and men (%)**

	Total 'Does represent the EU'	Aut. 2019 - Aut. 2018	Total 'Does not represent the EU'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	74	▲ 1	19	▼ 1	7	=
DZ 	78	▲ 9	16	▼ 6	6	▼ 3
MA 	77	▼ 5	20	▲ 5	3	=
TN 	56	▼ 6	27	▲ 1	17	▲ 5





Base: Respondents Maghreb (N=3085)



In the Mashrek, the majority of respondents in each country think democracy, equality between women and men and individual freedom represent the EU, with the highest proportions observed in Jordan for each value. There has been relatively little change at a country level since Autumn 2018, with the largest a six-point decline in the proportion of respondents in Lebanon who say equality between women and men represents the EU to them.





**A3.9** To what extent does the European Union represent the following values for you?

**Democracy (%)**

	Total 'Does represent the EU'	Aut. 2019 - Aut. 2018	Total 'Does not represent the EU'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	69	▲ 1	25	▼ 1	6	=
JO 	75	▲ 3	19	▼ 4	6	▲ 1
PS 	69	▲ 2	29	▲ 1	2	▼ 3
IL 	65	▲ 1	26	=	9	▼ 1
LB 	67	▼ 3	28	▲ 1	5	▲ 2





**A3.14** To what extent does the European Union represent the following values for you?

**Equality between women and men (%)**

	Total 'Does represent the EU'	Aut. 2019 - Aut. 2018	Total 'Does not represent the EU'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	68	▼ 2	24	▲ 1	8	▲ 1
JO 	77	▲ 2	18	▼ 2	5	=
PS 	74	▲ 2	24	▲ 2	2	▼ 4
IL 	59	▼ 2	27	=	14	▲ 2
LB 	68	▼ 6	28	▲ 5	4	▲ 1

**A3.7** To what extent does the European Union represent the following values for you?

**Individual Freedom (%)**

	Total 'Does represent the EU'	Aut. 2019 - Aut. 2018	Total 'Does not represent the EU'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	68	=	25	=	7	=
JO 	79	▲ 1	16	▼ 3	5	▲ 2
PS 	67	▼ 1	30	▲ 4	3	▼ 3
IL 	59	▼ 1	28	=	13	▲ 1
LB 	68	▼ 2	27	▲ 1	5	▲ 1

Base: Respondents Mashrek (N=4000)






The socio-demographic analysis also focuses on the three most mentioned values in each country.

In the **Maghreb**, respondents who think each of these values represents the EU are most likely to be found amongst the following groups: those who completed education aged 16 or older, managers, respondents who have relatives living in the EU, those who have a positive attitude towards the EU or those who feel well informed about the EU.






In the **Mashrek**, men, those with a positive view of the EU or who feel well informed about the EU are the most likely to say each value represents the EU to them. In addition:

- Respondents who have relatives living in the EU are more likely to say the EU represents equality between women and men, compared to those who do not (73% vs 67%). They are also more likely to say that democracy and individual freedom are values that represent the European Union.

**A3** To what extent does the European Union represent the following values for you?  
(% - **MAGHREB**)

	Individual Freedom		Human Rights		Equality between women and men	
	Total 'Does represent the EU'	Total 'Does not represent the EU'	Total 'Does represent the EU'	Total 'Does not represent the EU'	Total 'Does represent the EU'	Total 'Does not represent the EU'
<b>MAGHREB</b>	77	17	75	20	74	19
 <b>Gender</b>						
Male	79	17	77	20	75	20
Female	75	16	73	20	74	18
 <b>Age</b>						
15-24 years	78	17	77	19	73	21
25-39 years	81	15	78	19	80	17
40-54 years	75	18	72	22	74	19
55 years or more	69	18	68	20	67	20
 <b>Education (End of)</b>						
15-	72	18	72	19	69	21
16-19	82	15	80	17	77	20
20 or more	82	15	78	20	83	15
Still studying	78	18	77	19	75	20
 <b>Occupation</b>						
Self-employed	80	15	75	21	76	19
Managers	88	8	83	13	89	10
White collars	79	19	73	24	80	18
Manual workers	72	19	71	21	68	21
House persons	76	16	73	20	73	20
Unemployed	75	17	75	19	73	20
Retired	77	15	76	16	76	16
Students	78	18	78	18	74	21
<b>Relatives living in the EU</b>						
Yes	81	16	78	19	78	18
No	73	18	73	20	71	20
 <b>Opinion of the EU</b>						
Positive	87	11	85	14	85	13
Neutral	75	20	73	22	70	25
Negative	71	25	63	32	68	27
<b>Informed about the EU</b>						
Well-informed	86	12	84	15	84	14
Not informed	72	20	69	24	68	24

**A3** To what extent does the European Union represent the following values for you?  
(% - MASHREK)

	Democracy		Equality between men and women		Individual Freedom	
	Total 'Does represent the EU'	Total 'Does not represent the EU'	Total 'Does represent the EU'	Total 'Does not represent the EU'	Total 'Does represent the EU'	Total 'Does not represent the EU'
MASHREK	69	25	68	24	68	25
 <b>Gender</b>						
Male	72	23	72	22	71	23
Female	65	27	64	27	64	27
 <b>Age</b>						
15-24 years	68	24	66	25	68	23
25-39 years	68	25	70	23	67	26
40-54 years	69	25	69	24	67	26
55 years or more	68	27	67	25	68	25
 <b>Education (End of)</b>						
15-	66	27	71	23	67	27
16-19	70	23	67	24	67	24
20 or more	71	25	71	23	68	26
Still studying	64	27	64	26	69	22
 <b>Occupation</b>						
Self-employed	71	25	73	22	69	27
Managers	70	26	72	23	71	24
White collars	68	24	62	27	64	26
Manual workers	69	24	69	26	65	28
House persons	70	24	72	22	67	26
Unemployed	68	25	68	24	71	23
Retired	66	28	67	22	68	23
Students	66	26	66	25	69	23
<b>Relatives living in the EU</b>						
Yes	72	25	73	24	70	26
No	68	25	67	24	67	25
 <b>Opinion of the EU</b>						
Positive	83	15	81	17	82	16
Neutral	63	29	61	28	61	28
Negative	46	50	54	41	47	48
<b>Informed about the EU</b>						
Well-informed	75	23	75	22	74	23
Not informed	63	28	62	27	61	28

### 3. Relation with the European Union

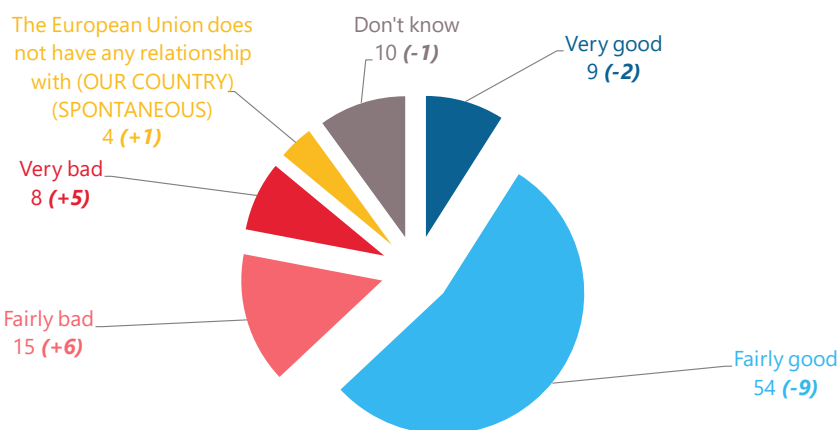
#### Country-level relation with the European Union

More than six in ten respondents in Maghreb (63%) and Mashrek (67%) countries say the EU has a good relationship with their country<sup>13</sup>. In both groups of countries 23% say their country's relationship with the EU is bad. Only a small proportion in the Maghreb (4%) or the Mashrek (2%) say their country does not have a relationship with the EU.

Respondents in the Maghreb are now much less likely to be positive about the EU's relationship with their country (-11 pp), while there has been little change in opinion in the Mashrek (+2 pp).

**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad?

(% - **MAGHREB**)

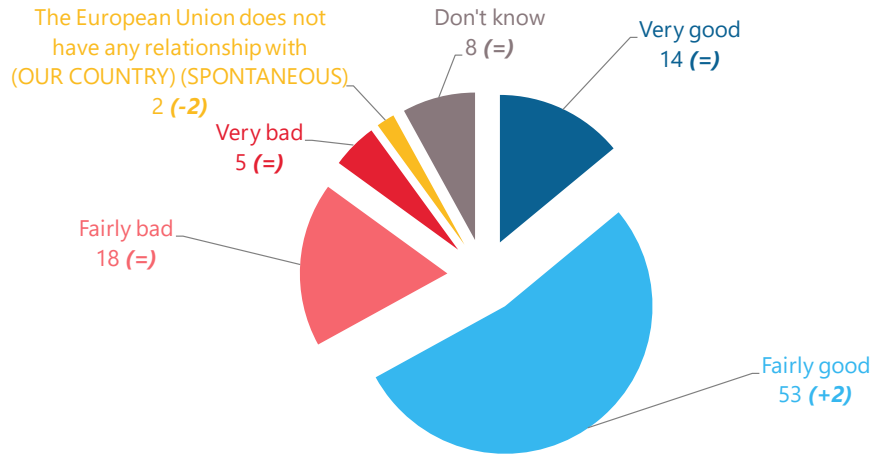


(Autumn 2019 - Autumn 2018)

Base: respondents Maghreb (N=3085)

<sup>13</sup> A4. Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad?

**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad?  
 (% - MASHREK)



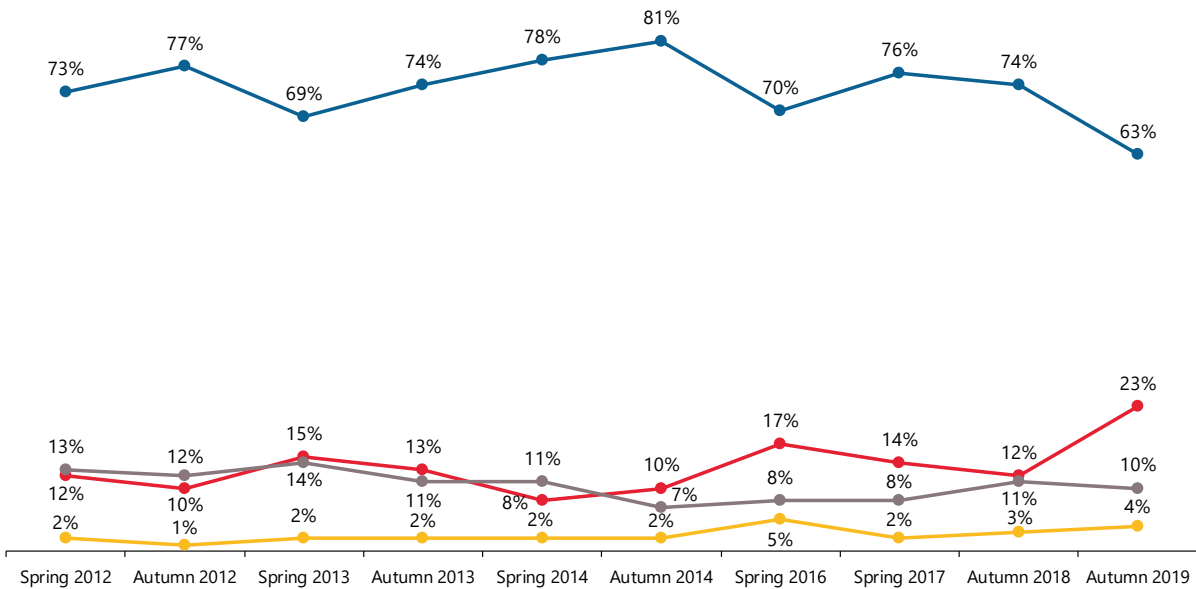
(Autumn 2019 - Autumn 2018)

Base: respondents Mashrek (N=4000)

The longer-term trend shows the proportion of respondents in the Maghreb who think the EU's relations with their country are good is at its lowest ever point and is now 18 points lower than the highest result in Autumn 2014. The proportion who say the relationship is bad is also at its highest ever point.

**A4. Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad? - % MAGHREB**

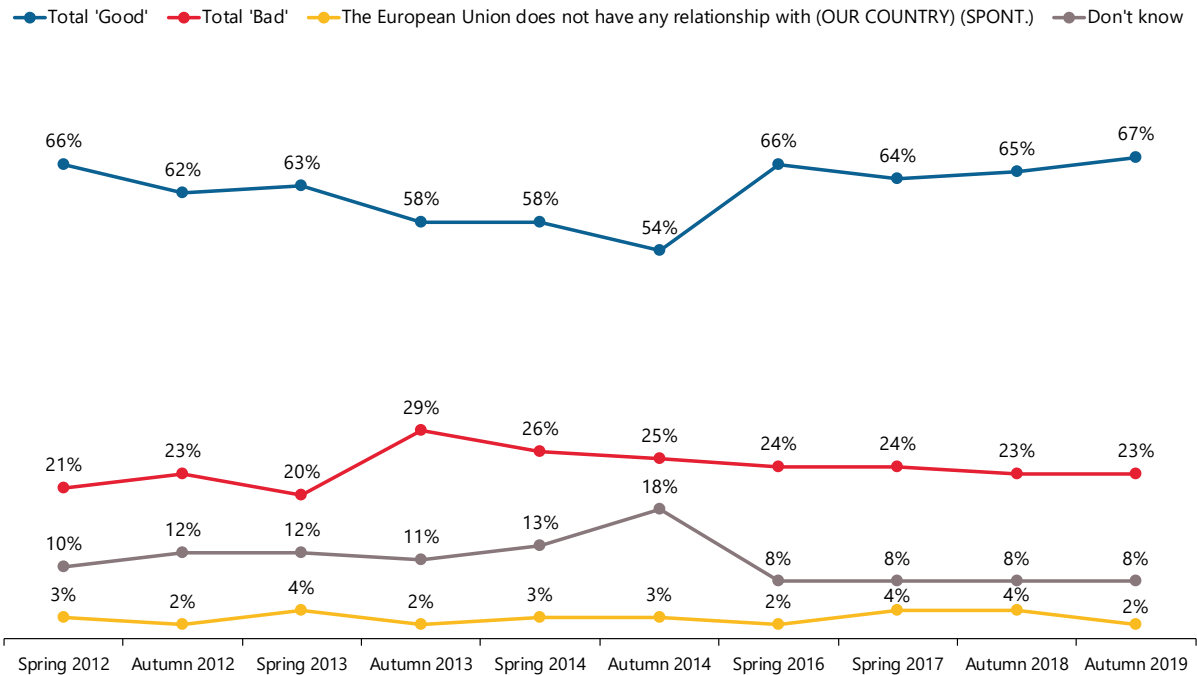
Legend: Total 'Good' (blue), Total 'Bad' (red), The European Union does not have any relationship with (OUR COUNTRY) (SPONT.) (yellow), Don't know (grey)



Base: respondents Maghreb (N=3085)

In the Mashrek, on the other hand, the proportion who think the EU's relationship with their country is good is at its highest point and has been fairly steady since Spring 2016.

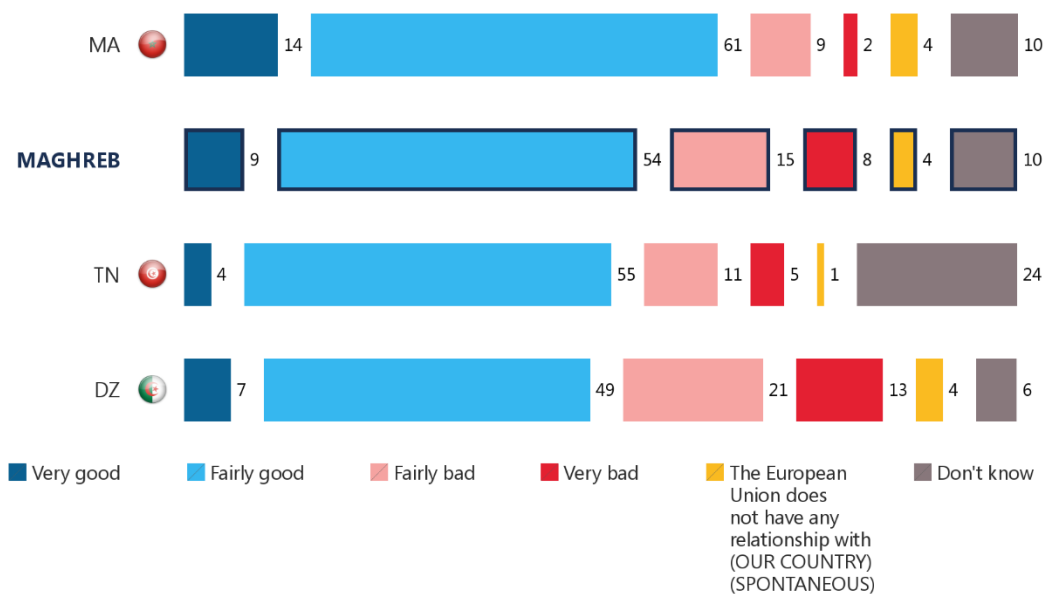
**A4. Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad? - % MASHREK**



Base: respondents Mashrek (N=4000)

In the Maghreb, respondents in Morocco (75%) are more likely to say their country has a good relationship with the EU than those in Tunisia (59%) or Algeria (56%).




**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad? (%)



Base: respondents Maghreb (N=3085)

Although the majority in each country think the EU has a good relationship with their country, in each case this represents a decline compared to Autumn 2018. The largest is a 15-percentage point decrease in Algeria.

**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad?  
(%)

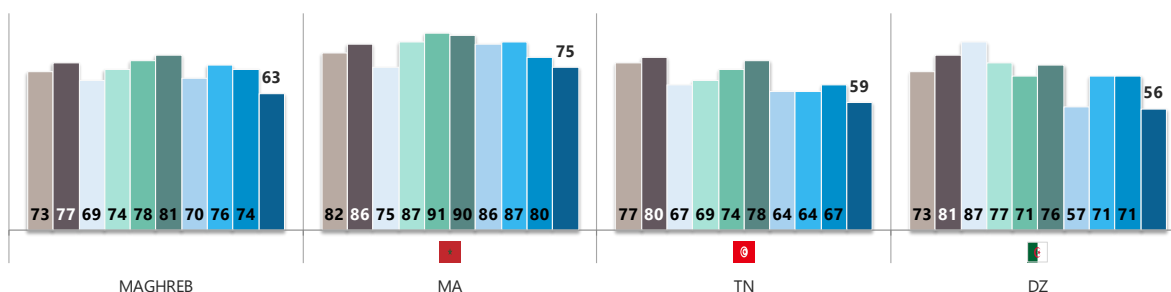
	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	The European Union does not have any relationship with (OUR COUNTRY) (SPONTANEOUS)	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	63	▼ 11	23	▲ 11	4	▲ 1	10	▼ 1
MA 	75	▼ 5	11	▲ 4	4	=	10	▲ 1
TN 	59	▼ 8	16	▼ 1	1	▼ 2	24	▲ 11
DZ 	56	▼ 15	34	▲ 19	4	▲ 2	6	▼ 6

Base: respondents Maghreb (N=3085)

The longer-term trend shows that the proportion of respondents in Tunisia and Algeria who say the EU has a good relationship with their country are at their lowest points since 2012. In Morocco the percentage of respondents who say the EU has a good relationship with their country is at its lowest point since Autumn 2013 and tied with the lowest point in all waves which happened in Spring 2013 (75%).

**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad?  
(% - TOTAL 'GOOD')

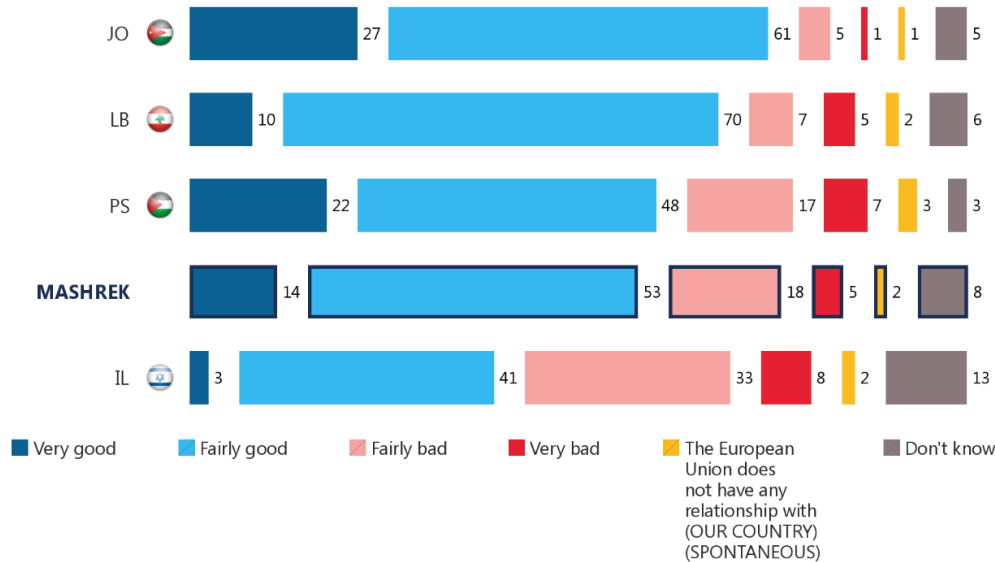
■ Spring 2012 ■ Autumn 2012 ■ Spring 2013 ■ Autumn 2013 ■ Spring 2014 ■ Autumn 2014 ■ Spring 2016 ■ Spring 2017 ■ Autumn 2018 ■ Autumn 2019



Base: respondents Maghreb (N=3085)

Israel (44%) is the only country in the Mashrek where a minority say the EU has a good relationship with their country – considerably lower than the proportions in Jordan (88%) Lebanon (80%) or Palestine (70%). Respondents in Jordan (27%) and Palestine (22%) are also much more likely than those in the other countries in the Mashrek to say the EU has a 'very good' relationship with their country.

**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad? (%)



Base: respondents Mashrek (N=4000)

Opinion in Lebanon has become much more positive since Autumn 2018 (+12 pp), but there has been little change in the other countries in Mashrek.

**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad? (%)

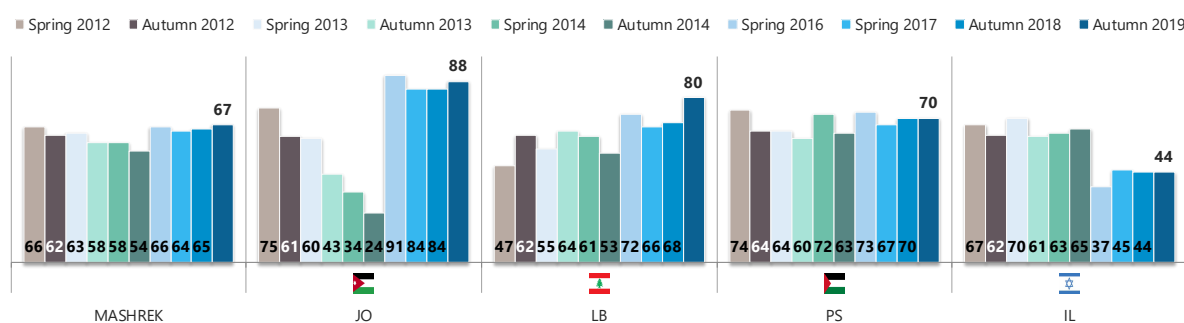
	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	The European Union does not have any relationship with (OUR COUNTRY) (SPONTANEOUS)	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	67	▲ 2	23	=	2	▼ 2	8	=
LB	80	▲ 12	12	▼ 6	2	▼ 6	6	=
JO	88	▲ 4	6	▼ 1	1	▼ 1	5	▼ 2
PS	70	=	24	▲ 4	3	▼ 3	3	▼ 1
IL	44	=	41	▼ 1	2	=	13	▲ 1

Base: respondents Mashrek (N=4000)



The longer-term trends show respondents in Lebanon are now the most positive they have ever been about the relationship between the EU and their country. Opinion in Palestine has remained reasonably steady since Spring 2012, while in Israel the positive view remains far less widespread than it was in the period between Spring 2012 and Autumn 2014.

**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad?  
(% - TOTAL 'GOOD')







Base: Respondents Mashrek (N=4000)

The socio-demographic analysis illustrates the following:





- In the **Maghreb**, respondents aged 15-24 are the most likely to say the EU's relationship with their country is good, compared to those aged 55 and older. In the **Mashrek**, on the other hand, respondents aged 15-24 are more likely to think this way than older respondents. For example, 71% of the youngest respondents say the relationship is good, compared to 63% of those aged 55 and older.
- In the **Maghreb**, respondents who completed their education aged 16-19 (66%) or who are still studying (68%) are the most likely to say the EU has a good relationship with their country. In the **Mashrek**, on the other hand, those who completed education aged 15 or younger (80%) are the most likely to think this way.

In addition, in both **Maghreb** and **Mashrek** countries, respondents who have a positive opinion of the EU, or those who feel well-informed about the EU are the most likely to say relations between the EU and their country are good.

**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad?  
(% - **MAGHREB**)

	Total 'Good'	Total 'Bad'	Don't know
MAGHREB	63	23	10
 Gender			
Male	64	25	7
Female	63	20	13
 Age			
15-24 years	67	22	7
25-39 years	65	24	7
40-54 years	62	23	11
55 years or more	55	22	19
 Education (End of)			
15-	60	24	12
16-19	66	27	4
20 or more	59	29	7
Still studying	68	22	7
 Opinion of the EU			
Positive	78	16	4
Neutral	60	27	9
Negative	44	44	7
<b>Informed about the EU</b>			
Well-informed	77	19	2
Not informed	56	27	13

**A4** Would you describe the European Union's relation with (OUR COUNTRY) as very good, fairly good, fairly bad or very bad?  
(% - **MASHREK**)

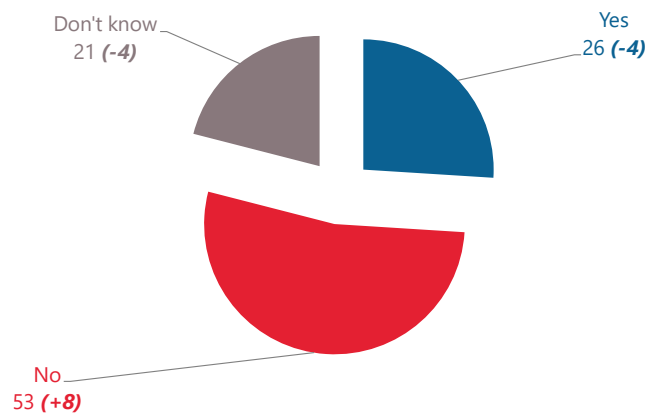
	Total 'Good'	Total 'Bad'	Don't know
MASHREK	67	23	8
 Gender			
Male	67	26	6
Female	66	21	10
 Age			
15-24 years	71	18	9
25-39 years	66	25	7
40-54 years	66	25	8
55 years or more	63	26	8
 Education (End of)			
15-	80	12	6
16-19	63	25	10
20 or more	65	27	6
Still studying	68	22	9
 Opinion of the EU			
Positive	85	11	3
Neutral	61	24	12
Negative	31	61	4
<b>Informed about the EU</b>			
Well-informed	71	24	4
Not informed	64	23	11

## Awareness of financial support from the EU

As was the case in 2018, awareness of the financial support the EU gives to countries in the Southern Neighbourhood is much higher in Mashrek (46%) than in Maghreb (26%) countries<sup>14</sup>. The proportion who say they don't know is similar in both regions at just over one in five (Maghreb: 21%, Mashrek: 23%).

Compared to 2018, awareness of financial support has declined slightly in both Maghreb (-4 pp) and Mashrek (-2 pp) countries, continuing the trend seen between Spring 2017 and Autumn 2018.

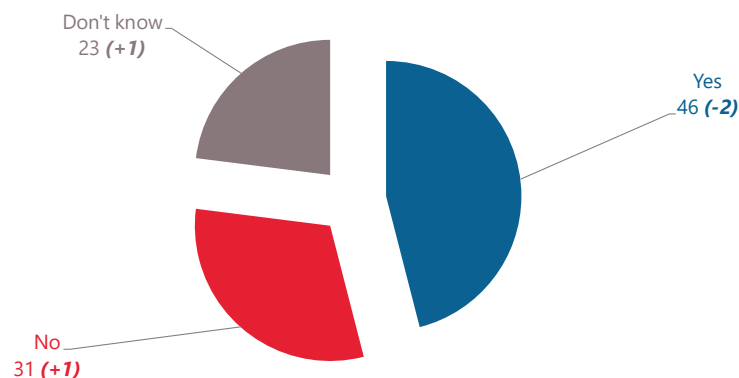
**A5** As far as you know, does the European Union provide (OUR COUNTRY) with financial support?  
(% - **MAGHREB**)



(Autumn 2019 - Autumn 2018)

Base: respondents Maghreb (N=3085)

**A5** As far as you know, does the European Union provide (OUR COUNTRY) with financial support?  
(% - **MASHREK**)



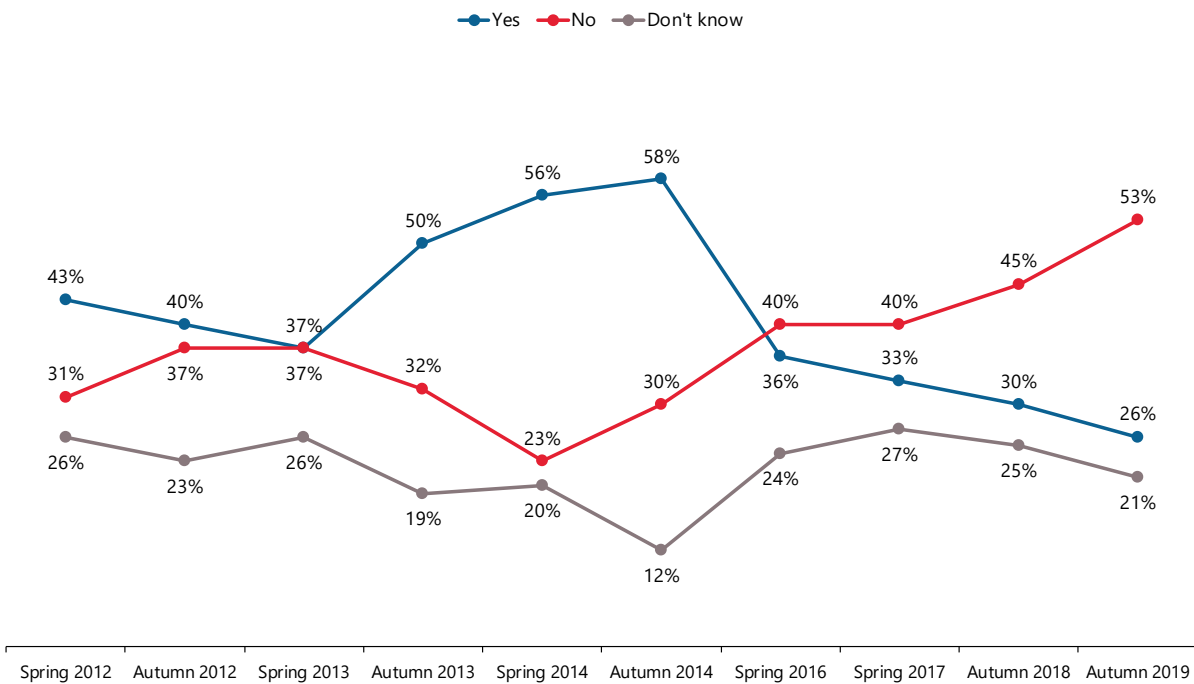
(Autumn 2019 - Autumn 2018)

Base: respondents Mashrek (N=4000)

<sup>14</sup> A5. As far as you know, does the European Union provide (OUR COUNTRY) with financial support?

Awareness of financial support from the EU has been declining in the Maghreb since Autumn 2014 and is now at its lowest point.

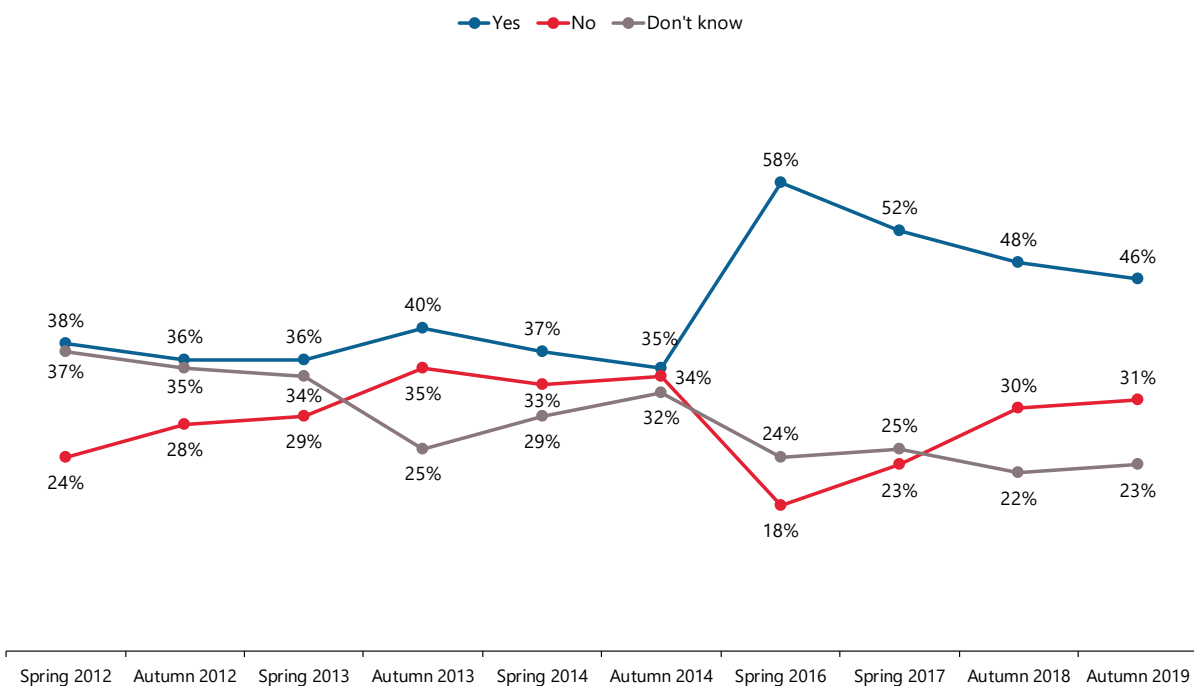
**A5. As far as you know, does the European Union provide (OUR COUNTRY) with financial support?**  
- % MAGHREB



Base: respondents Maghreb (N=3085)

In Mashrek, awareness has been declining steadily since Spring 2016, although it remains higher than the period between Spring 2012 and Autumn 2014.

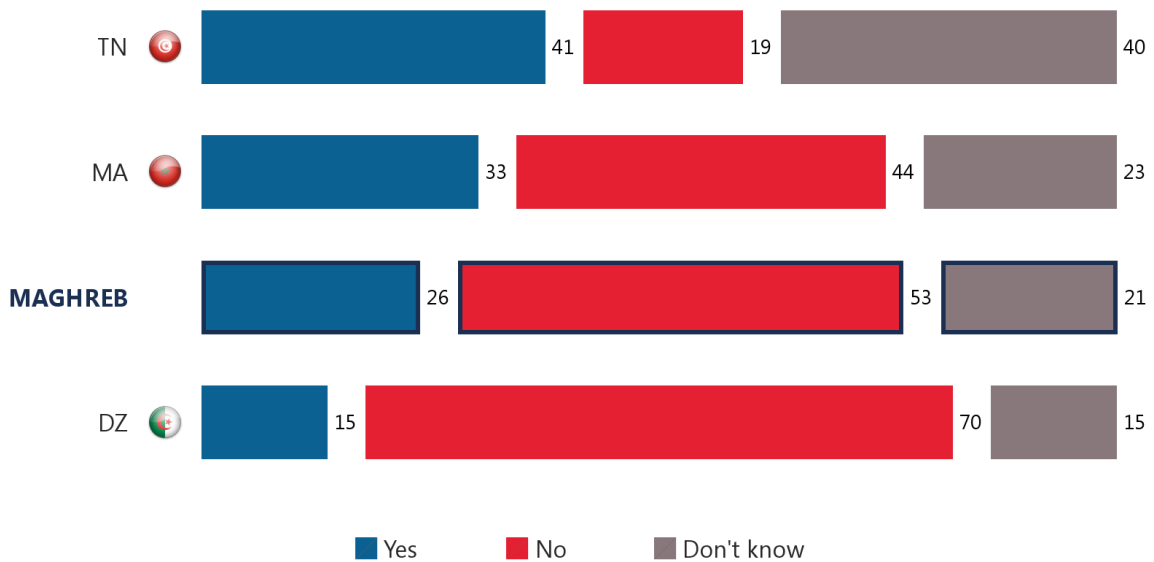
**A5. As far as you know, does the European Union provide (OUR COUNTRY) with financial support?**  
- % MASHREK



Base: respondents Mashrek (N=4000)

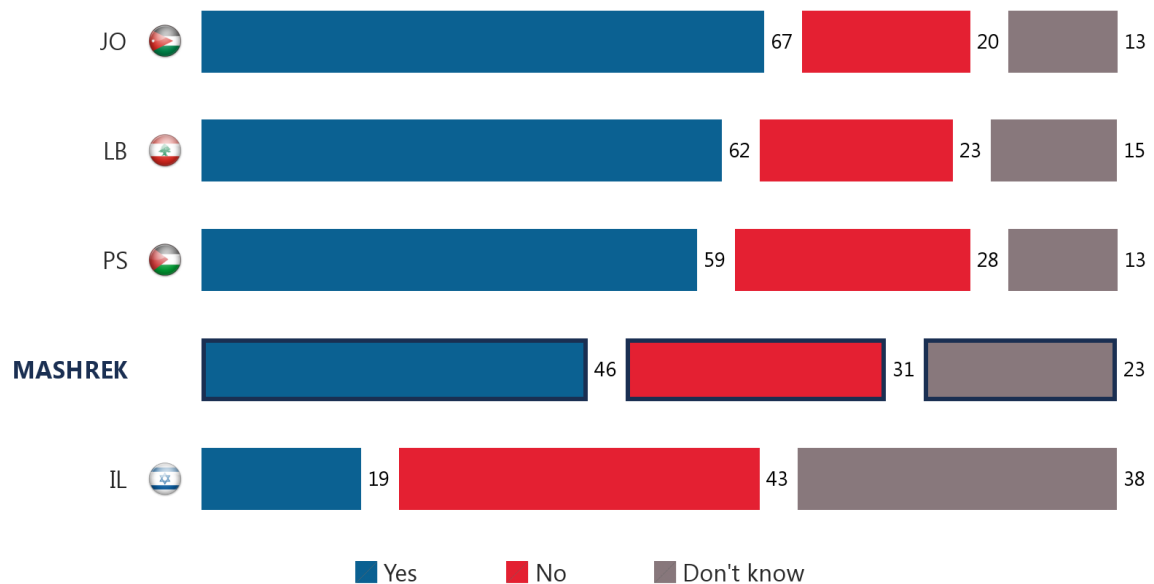
In the Maghreb, respondents in Tunisia are the most likely to be aware the EU provides their country financial support, particularly compared to respondents in Algeria (15%). In the Mashrek, on the other hand, the majority in each country except Israel (19%) are aware the EU provides financial support to their country.

**A5** As far as you know, does the European Union provide (OUR COUNTRY) with financial support? (%)



Base: respondents Maghreb (N=3085)

**A5** As far as you know, does the European Union provide (OUR COUNTRY) with financial support? (%)









Base: respondents Mashrek (N=4000)

The socio-demographic analysis shows that in both **Maghreb** and **Mashrek** countries, respondents with a positive opinion about the EU, those who say relations between the EU and their country are good, and those who feel well-informed about the EU are the most likely to be aware of EU financial support to their country. There are no other notable differences in the Maghreb.







For the **Mashrek**, however, the analysis also shows the following groups are most likely to be aware of financial support from the EU to their country:

- Respondents aged under 55, with respondents aged 15-24 the most aware (49%);
- Those who completed education aged 15 or younger (63%);
- Those living in large or small/mid-size towns (47%);
- Those who experience the most financial difficulties (54%);
- Those with relatives living in the EU (50%).

**A5** As far as you know, does the European Union provide (OUR COUNTRY) with financial support?  
(% - **MAGHREB**)

	Yes	No	Don't know
<b>MAGHREB</b>	26	53	21
 <b>Gender</b>			
Male	28	55	17
Female	24	50	26
 <b>Age</b>			
15-24 years	25	55	20
25-39 years	26	55	19
40-54 years	29	50	21
55 years or more	22	48	30
 <b>Education (End of)</b>			
15-	26	51	23
16-19	22	61	17
20 or more	24	60	16
Still studying	26	54	20
 <b>Subjective urbanisation</b>			
Rural area or village	25	54	21
Small/mid size town	22	55	23
Large town	27	52	21
 <b>Difficulties paying bills</b>			
Most of the time	25	53	22
From time to time	31	47	22
Almost never/ never	22	60	18
<b>Relatives living in the EU</b>			
Yes	28	55	17
No	24	51	25
 <b>Opinion of the EU</b>			
Positive	35	48	17
Neutral	21	58	21
Negative	18	68	14
<b>Relations between EU and country</b>			
Good	34	47	19
Bad	15	75	10
<b>Informed about the EU</b>			
Well-informed	33	53	14
Not informed	21	54	25

**A5** As far as you know, does the European Union provide (OUR COUNTRY) with financial support?  
(% - **MASHREK**)

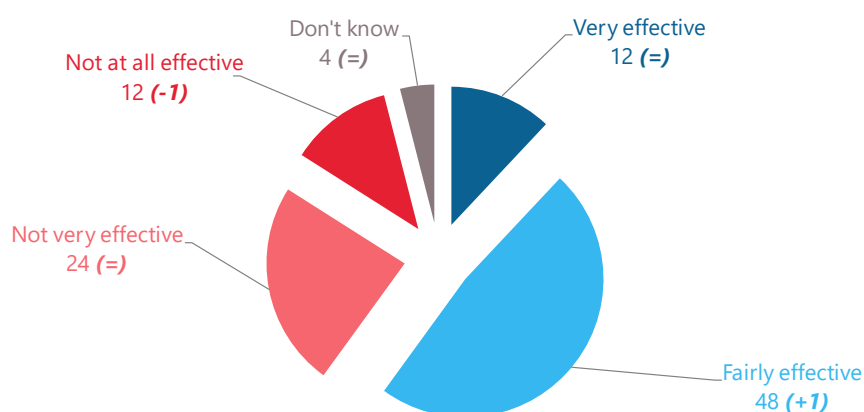
	Yes	No	Don't know
<b>MASHREK</b>	46	31	23
 <b>Gender</b>			
Male	48	33	19
Female	44	29	27
 <b>Age</b>			
15-24 years	49	27	24
25-39 years	48	28	24
40-54 years	46	33	21
55 years or more	40	38	22
 <b>Education (End of)</b>			
15-	63	23	14
16-19	40	33	27
20 or more	46	33	21
Still studying	49	28	23
 <b>Subjective urbanisation</b>			
Rural area or village	42	33	25
Small/mid size town	47	32	21
Large town	47	30	23
 <b>Difficulties paying bills</b>			
Most of the time	54	26	20
From time to time	48	32	20
Almost never/ never	40	35	25
<b>Relatives living in the EU</b>			
Yes	50	31	19
No	45	31	24
 <b>Opinion of the EU</b>			
Positive	60	24	16
Neutral	37	32	31
Negative	28	52	20
<b>Relations between EU and country</b>			
Good	61	23	16
Bad	18	57	25
<b>Informed about the EU</b>			
Well-informed	50	34	16
Not informed	44	28	28

## Perceived effectiveness of financial support

Respondents who said the EU provided their country with financial support were asked how effective they thought this support was<sup>15</sup>. More than three quarters (78%) of the respondents in Mashrek countries say the support is effective, compared to 60% in Maghreb countries.

Compared to 2018 there has been no change in opinion in the Maghreb, but respondents in the Mashrek are now more likely to say the support is effective (+9 pp).

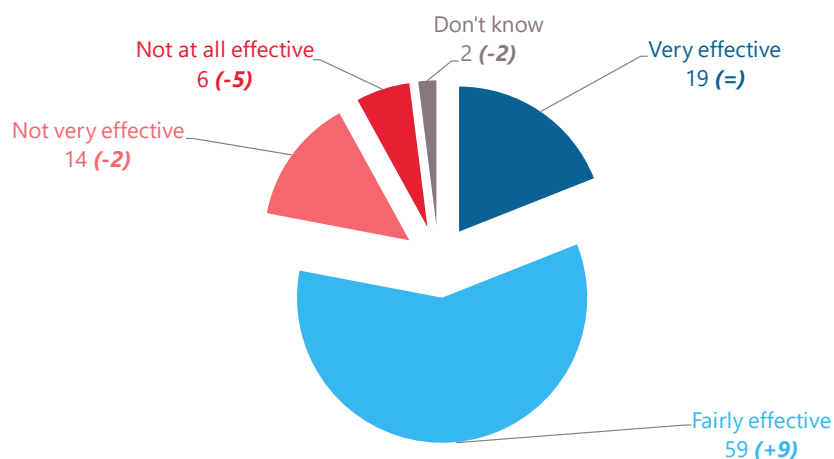
- A6** How effective do you think the financial support provided by the European Union to (OUR COUNTRY) has been?  
(% - **MAGHREB**)



(Autumn 2019 - Autumn 2018)

Base: respondents aware of the EU's financial support in Maghreb (N=795)

- A6** How effective do you think the financial support provided by the European Union to (OUR COUNTRY) has been?  
(% - **MASHREK**)



(Autumn 2019 - Autumn 2018)

Base: respondents aware of the EU's financial support in Mashrek (N=1846)

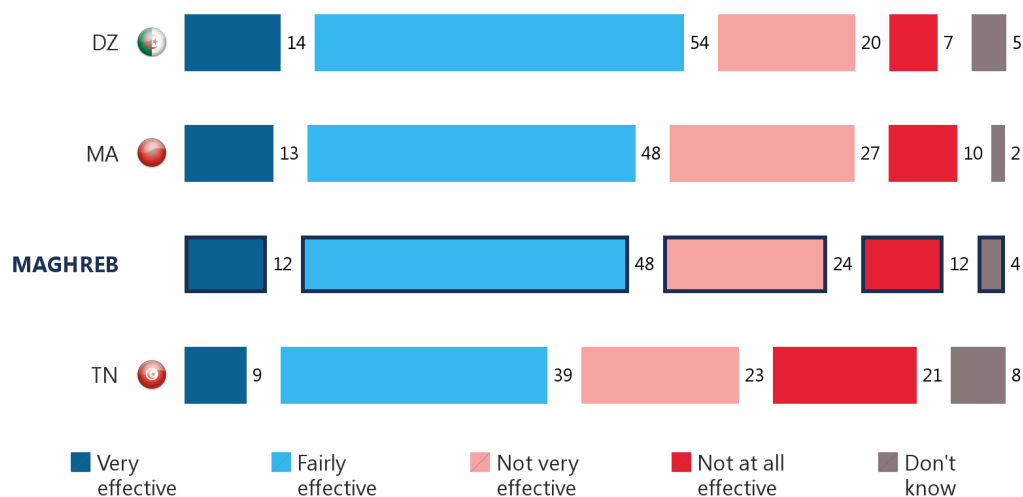
<sup>15</sup> A6. How effective do you think the financial support provided by the European Union to (OUR COUNTRY) has been?



In the Maghreb, respondents in Algeria (68%) and Morocco (61%) are much more likely to think support has been effective than respondents in Tunisia (48%).

Compared to Autumn 2018, respondents in Morocco are now more likely to think this support has been effective (+9 pp), while those in Algeria are now less likely to think this way (-7 pp).

**A6** How effective do you think the financial support provided by the European Union to (OUR COUNTRY) has been?  
(%)



Base: respondents aware of the EU's financial support in Maghreb (N=795)

**A6** How effective do you think the financial support provided by the European Union to (OUR COUNTRY) has been?  
(%)

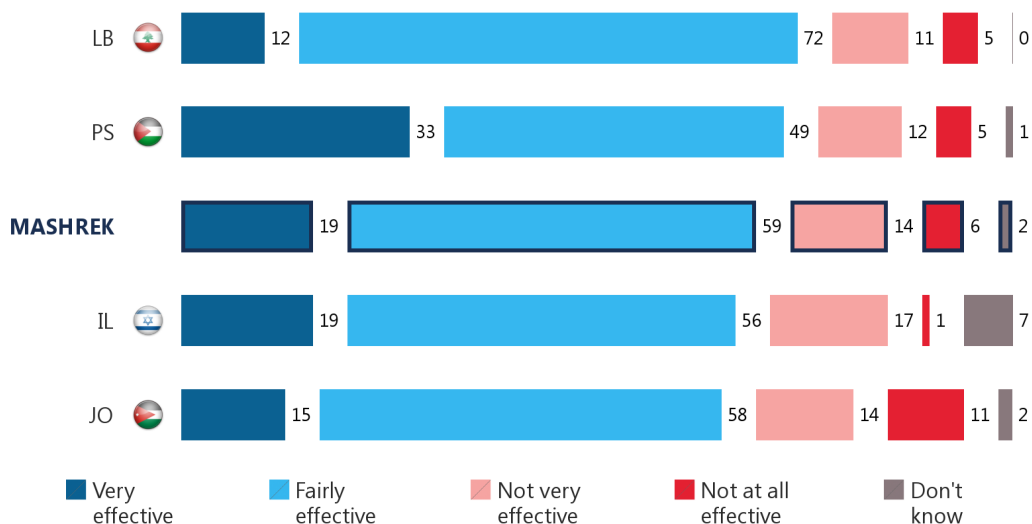
	Total 'Effective'	Aut. 2019 - Aut. 2018	Total 'Not Effective'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	60	▲ 1	36	▼ 1	4	=
MA	61	▲ 9	37	▼ 8	2	▼ 1
TN	48	▼ 2	44	=	8	▲ 2
DZ	68	▼ 7	27	▲ 6	5	▲ 1

Base: respondents aware of the EU's financial support in Maghreb (N=795)

In each Mashrek country, more than seven in ten of this group of respondents think EU support has been effective, with proportions ranging from 84% in Lebanon to 73% in Jordan.

Compared to Autumn 2018, respondents in Jordan have become much more positive (+20 pp) about the effectiveness of EU support, and opinion has also become more positive in Lebanon (+10 pp) and Palestine (+5 pp). In contrast, respondents in Israel are now less likely to say that EU support to their country has been effective (-9 pp).

**A6** How effective do you think the financial support provided by the European Union to (OUR COUNTRY) has been? (%)



Base: respondents aware of the EU's financial support in Mashrek (N=1846)

**A6** How effective do you think the financial support provided by the European Union to (OUR COUNTRY) has been? (%)






	Total 'Effective'	Aut. 2019 - Aut. 2018	Total 'Not Effective'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
<b>MASHREK</b>	78	▲ 9	20	▼ 7	2	▼ 2
JO	73	▲ 20	25	▼ 17	2	▼ 3
LB	84	▲ 10	16	▼ 9	0	▼ 1
PS	82	▲ 5	17	▼ 4	1	▼ 1
IL	75	▼ 9	18	▲ 11	7	▼ 2

Base: respondents aware of the EU's financial support in Mashrek (N=1846)






The socio-demographic analysis shows the following:

- In the **Maghreb**, respondents aged 25-54 are the most likely to say EU support to their country has been effective, while in the **Mashrek** those aged 55 and older are the most likely to think this way.
- In the **Maghreb**, respondents living in rural villages (63%) or large towns (61%) are more likely to say support has been effective than those living in small/mid-sized towns.
- In the **Maghreb** managers are the most likely to say support has been effective (73%), particularly compared to students (54%). Opinions about the EU are also influential. In both the **Maghreb** and the **Mashrek**, respondents who have a positive opinion of the EU, or who think relations between the EU and their country are good are more likely to be positive about the effectiveness of EU support. Finally, in both the **Maghreb** and the **Mashrek**, respondents who feel well-informed about the EU are more likely to say support has been effective than those who do not feel well-informed. For instance, in the Mashrek 83% of those who feel well-informed say support has been effective, compared to 71% of respondents who do not feel well-informed.

**A6** How effective do you think the financial support provided by the European Union to (OUR COUNTRY) has been?  
(% - **MAGHREB**)

	Total 'Effective'	Total 'Not Effective'	Don't know
MAGHREB	60	36	4
 <b>Gender</b>			
Male	58	38	4
Female	62	33	5
 <b>Age</b>			
15-24 years	55	41	4
25-39 years	63	34	3
40-54 years	64	32	4
55 years or more	55	37	8
 <b>Subjective urbanisation</b>			
Rural area or village	63	33	4
Small/mid size town	48	46	6
Large town	61	35	4
 <b>Occupation</b>			
Self-employed	57	36	7
Managers	73	25	2
White collars	60	37	3
Manual workers	58	38	4
House persons	59	38	3
Unemployed	70	27	3
Retired	57	33	10
Students	54	42	4
 <b>Opinion of the EU</b>			
Positive	65	33	2
Neutral	54	38	8
Negative	45	48	7
<b>Relations between EU and country</b>			
Good	63	33	4
Bad	44	53	3
<b>Informed about the EU</b>			
Well-informed	63	34	3
Not informed	57	37	6

**A6** How effective do you think the financial support provided by the European Union to (OUR COUNTRY) has been?  
(% - **MASHREK**)

	Total 'Effective'	Total 'Not Effective'	Don't know
MASHREK	78	20	2
 <b>Gender</b>			
Male	78	20	2
Female	77	20	3
 <b>Age</b>			
15-24 years	79	19	2
25-39 years	77	22	1
40-54 years	73	23	4
55 years or more	82	17	1
 <b>Subjective urbanisation</b>			
Rural area or village	80	18	2
Small/mid size town	77	20	3
Large town	78	21	1
 <b>Occupation</b>			
Self-employed	73	25	2
Managers	79	20	1
White collars	78	19	3
Manual workers	77	22	1
House persons	81	17	2
Unemployed	79	21	0
Retired	75	21	4
Students	76	21	3
 <b>Opinion of the EU</b>			
Positive	86	13	1
Neutral	68	28	4
Negative	50	48	2
<b>Relations between EU and country</b>			
Good	81	18	1
Bad	51	44	5
<b>Informed about the EU</b>			
Well-informed	83	15	2
Not informed	71	27	2

## 4. The European Union among other countries and institutions

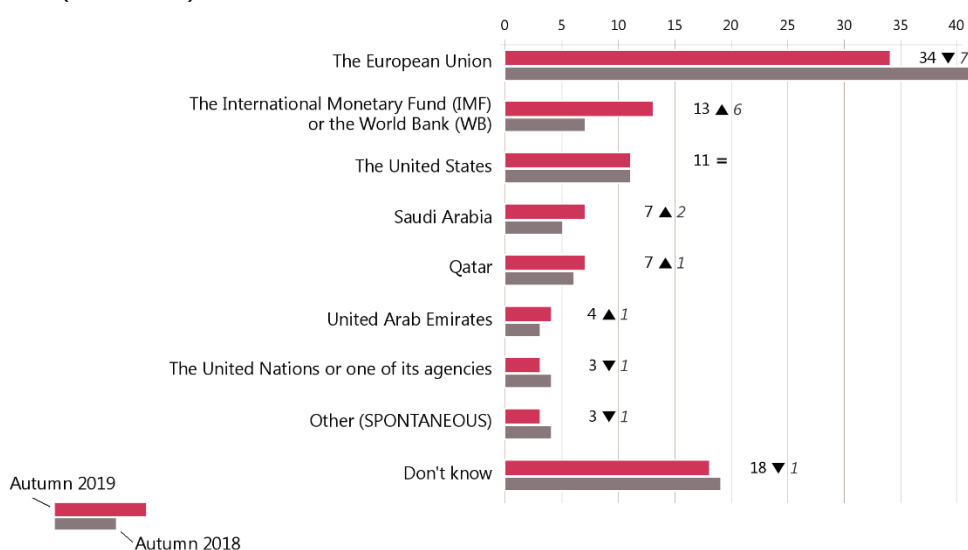
### Closest institutional partners for Maghreb and Mashrek countries

Respondents were asked which, of a range of institutions or countries, was the closest partner to their country<sup>16</sup>. In the Maghreb 34% mention the European Union. Not only is this the most mentioned answer, there is also a considerably higher proportion of respondents who mention this item than the proportion of respondents in the Mashrek who say the same (12%). In the Maghreb, the International Monetary Fund (IMF) or the World Bank (13%) and the United States (11%) are the only other countries or institutions mentioned by at least one in ten respondents.

In the Mashrek, the United States (45%) is the most mentioned entity by a considerable margin, with Saudi Arabia (13%) and the EU (12%) the only other countries or bodies mentioned by at least one in ten respondents.

Comparing these results to those from summer 2018 shows that in the Maghreb, respondents are now less likely to mention the EU (-7 pp), but they are more likely to mention the IMF/World Bank (+6 pp). There has been little change in the results in the Mashrek (1-3 pp).

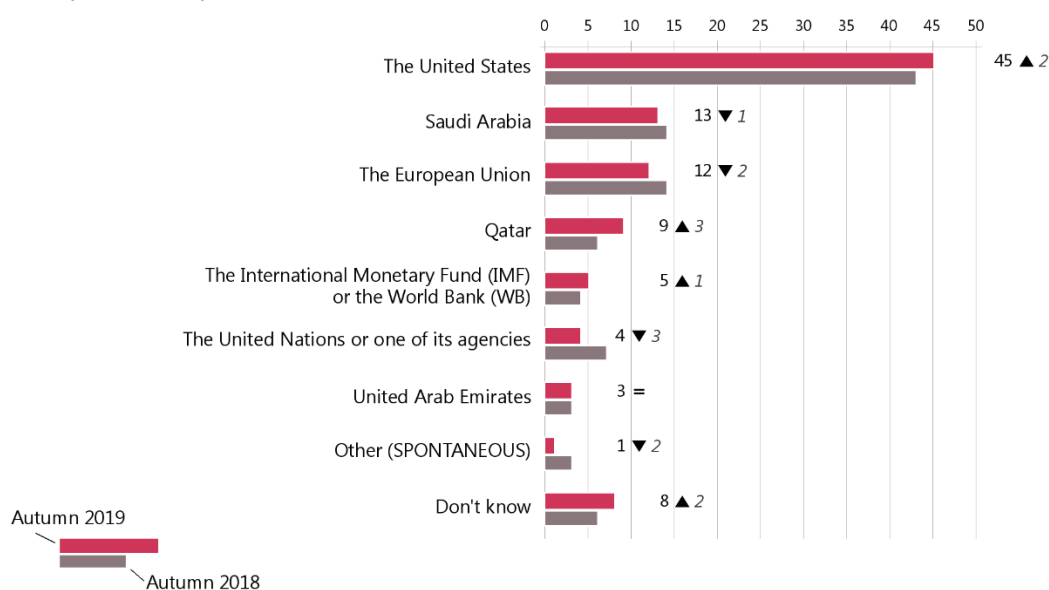
**A15** In your view, which of the following international institutions or countries is the closest partner to (OUR COUNTRY)?  
(% - MAGHREB)



Base: respondents Maghreb (N=3085)

<sup>16</sup> A15. In your view, which of the following international institutions or countries is the closest partner to (OUR COUNTRY)?

**A15** In your view, which of the following international institutions or countries is the closest partner to (OUR COUNTRY)?  
(% - MASHREK)



Base: respondents Mashrek (N=4000)

The country results for the Maghreb show that the EU is the most mentioned partner in all three countries, although respondents in Morocco (42%) are the most likely to mention it. Respondents in Algeria (20%) and Tunisia (14%) are much more likely than those in Morocco (4%) to mention the IMF/World Bank. Respondents in Morocco are the most likely to mention the United States (15%), while those in Tunisia are more likely than those in other countries to mention Qatar (14%).

Algeria is the only country where there has been a notable change since Autumn 2018, with a 13-point increase in the proportion who mention the IMF/World Bank, and an 11-point decline in mentions of the EU.

**A15** In your view, which of the following international institutions or countries is the closest partner to (OUR COUNTRY)?  
(%)

	The European Union	Aut. 2019 - Aut. 2018	The International Monetary Fund (IMF) or the World Bank (WB)	Aut. 2019 - Aut. 2018	The United States	Aut. 2019 - Aut. 2018	Saudi Arabia	Aut. 2019 - Aut. 2018	Qatar	Aut. 2019 - Aut. 2018	United Arab Emirates	Aut. 2019 - Aut. 2018	The United Nations or one of its agencies	Aut. 2019 - Aut. 2018	Other (SPONTANEOUS)	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	34	▼ 7	13	▲ 6	11	=	7	▲ 2	7	▲ 1	4	▲ 1	3	▼ 1	3	▼ 1	18	▼ 1
MA	42	▼ 2	4	▲ 1	15	▲ 1	6	▲ 1	4	▼ 1	4	=	3	=	1	=	21	=
DZ	30	▼ 11	20	▲ 13	9	▼ 2	8	▲ 3	6	▲ 3	5	▲ 2	4	=	4	▼ 3	14	▼ 5
TN	32	▲ 2	14	▼ 3	4	▼ 3	6	▲ 1	14	▼ 4	2	=	1	▼ 3	3	▲ 1	24	▲ 9

Base: respondents Maghreb (N=3085)

In the Mashrek, respondents in Israel (90%) are much more likely than those in other countries to mention the United States as a partner, although the US is also the most mentioned partner in Jordan (34%). Saudi Arabia is the most mentioned partner by respondents in Lebanon (31%), although 20% in Jordan also mention it. Qatar is the most mentioned partner by respondents in Palestine (29%), closely followed by the EU (24%).

Compared to Autumn 2018, respondents in Palestine are now more likely to mention Qatar (+13 pp) and less likely to mention the European Union (-9 pp). Respondents in Jordan are now more likely to mention the EU (+5 pp), while those in Lebanon are now more likely to mention Qatar (+5 pp).

**A15** In your view, which of the following international institutions or countries is the closest partner to (OUR COUNTRY)? (%)

	The United States	Aut. 2019 - Aut. 2018	Saudi Arabia	Aut. 2019 - Aut. 2018	The European Union	Aut. 2019 - Aut. 2018	Qatar	Aut. 2019 - Aut. 2018	The International Monetary Fund (IMF) or the World Bank (WB)	Aut. 2019 - Aut. 2018	The United Nations or one of its agencies	Aut. 2019 - Aut. 2018	United Arab Emirates	Aut. 2019 - Aut. 2018	Other (SPONTANEOUS)	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	45	▲ 2	13	▼ 1	12	▼ 2	9	▲ 3	5	▲ 1	4	▼ 3	3	=	1	▼ 2	8	▲ 2
IL	90	▼ 1	0	=	2	▼ 1	0	=	1	▲ 1	1	▼ 4	0	=	0	=	6	▲ 5
JO	34	▼ 1	20	▼ 4	11	▲ 5	6	▼ 1	12	▲ 4	4	▼ 3	5	▲ 1	1	▼ 3	7	▲ 2
LB	5	▲ 1	31	▲ 4	25	=	11	▲ 5	4	▼ 2	10	▼ 1	2	=	2	▼ 2	10	▼ 5
PS	6	▼ 4	10	▼ 1	24	▼ 9	29	▲ 13	2	▼ 1	7	▼ 1	8	▲ 1	3	▼ 1	11	▲ 3

Base: respondents Mashrek (N=4000)






The socio-demographic analysis shows some interesting differences:

- While in the **Maghreb** younger people are most likely to mention the European Union, in the **Mashrek** younger respondents are the least likely to mention the United States: 36% of those aged 15-24 do so, compared to 58% of those aged 55 and over. However, respondents who are 15-24 in the Mashrek are the most likely to mention Qatar or Saudi Arabia.
- In the **Maghreb** respondents who are still studying are slightly more likely to say the EU is their country's closest partner than other respondents who have finished their studies (40% vs 35-33%). In the **Mashrek**, people who stopped education when they were 16 or older are most likely to mention the United States (50%-55%) especially when compared to those who stopped education when they were 15 or younger (20%).
- In the **Maghreb** students are the most likely to think the EU is their country's closest partner (41%), especially when compared to respondents who are unemployed (29%), House persons (31%), or white-collar worker (32%). In the **Mashrek** people who are retired (68%) or white-collar workers (65%) are the most likely to say the US is their country's closest partner.






- In the **Maghreb and in the Mashrek** respondents who think relations between their country and the EU are good and who say they are well-informed about the EU are more likely to mention the European Union. In the **Mashrek** it is people who have a positive opinion of the EU and who believe relations between the EU and their country are good who are the most likely to mention the European Union as their country's closest partner.



**A15** In your view, which of the following international institutions or countries is the closest partner to (OUR COUNTRY)?  
(% - MAGHREB)

	The United States	The European Union	Saudi Arabia	Qatar	United Arab Emirates	The United Nations or one of its agencies	The International Monetary Fund (IMF) or the World Bank (WB)	Other (SPONTANEOUS)	Don't know
MAGHREB	11	34	7	7	4	3	13	3	18
 <b>Gender</b>									
Male	13	38	6	6	5	3	12	4	13
Female	8	31	8	7	4	4	14	2	22
 <b>Age</b>									
15-24 years	11	37	8	5	4	4	13	2	16
25-39 years	11	34	6	8	5	3	15	3	15
40-54 years	9	36	7	7	5	4	12	3	17
55 years or more	12	29	8	5	3	2	11	3	27
 <b>Education (End of)</b>									
15-	12	33	9	6	4	2	10	3	21
16-19	12	33	8	8	4	4	16	2	13
20 or more	8	35	5	6	6	4	20	3	13
Still studying	9	40	7	7	4	4	14	3	12
 <b>Occupation</b>									
Self-employed	10	33	7	8	6	4	15	3	14
Managers	8	37	7	11	5	1	24	2	5
White collars	9	32	6	7	5	4	20	7	10
Manual workers	11	37	8	5	4	2	10	1	22
House persons	11	31	7	4	3	4	7	2	31
Unemployed	11	29	7	8	4	5	13	3	20
Retired	14	39	3	5	4	1	13	4	17
Students	10	41	7	7	4	3	13	2	13
 <b>Opinion of the EU</b>									
Positive	10	45	5	7	4	4	12	2	11
Neutral	11	32	8	6	5	3	15	3	17
Negative	13	23	11	9	5	3	15	4	17
<b>Relations between EU and country</b>									
Good	11	41	7	6	4	4	13	2	12
Bad	12	27	8	9	5	3	18	5	13
<b>Informed about the EU</b>									
Well-informed	10	44	6	6	4	4	14	4	8
Not informed	11	29	8	7	5	2	14	1	23

**A15** In your view, which of the following international institutions or countries is the closest partner to (OUR COUNTRY)?  
(% - MASHREK)

	The United States	The European Union	Saudi Arabia	Qatar	United Arab Emirates	The United Nations or one of its agencies	The International Monetary Fund (IMF) or the World Bank (WB)	Other (SPONTANEOUS)	Don't know
MASHREK	45	12	13	9	3	4	5	1	8
 Gender									
Male	46	13	12	8	3	4	5	1	8
Female	45	12	14	9	3	4	4	1	8
 Age									
15-24 years	36	14	16	12	3	4	4	2	9
25-39 years	44	13	12	9	3	6	4	1	8
40-54 years	46	12	12	9	3	4	6	1	7
55 years or more	58	11	9	6	2	3	4	1	6
 Education (End of)									
15-	20	18	23	15	4	6	5	1	8
16-19	55	11	10	6	3	3	5	1	6
20 or more	50	13	9	9	3	4	4	1	7
Still studying	36	12	16	12	3	4	4	2	11
 Occupation									
Self-employed	33	19	15	11	3	5	4	1	9
Managers	56	11	7	7	3	4	3	1	8
White collars	65	8	8	3	2	4	3	1	6
Manual workers	37	18	9	8	3	6	10	1	8
House persons	26	15	21	13	4	5	6	1	9
Unemployed	32	15	13	14	5	6	6	2	7
Retired	68	7	9	4	1	2	4	0	5
Students	42	10	14	11	3	4	4	2	10
 Opinion of the EU									
Positive	36	18	15	10	4	6	5	1	5
Neutral	53	8	11	8	3	4	4	1	8
Negative	63	4	8	7	2	2	4	2	8
Relations between EU and country									
Good	37	16	15	10	4	5	6	1	6
Bad	67	6	8	7	2	2	1	1	6
Informed about the EU									
Well-informed	51	14	10	8	3	4	4	1	5
Not informed	39	11	16	10	3	5	5	1	10

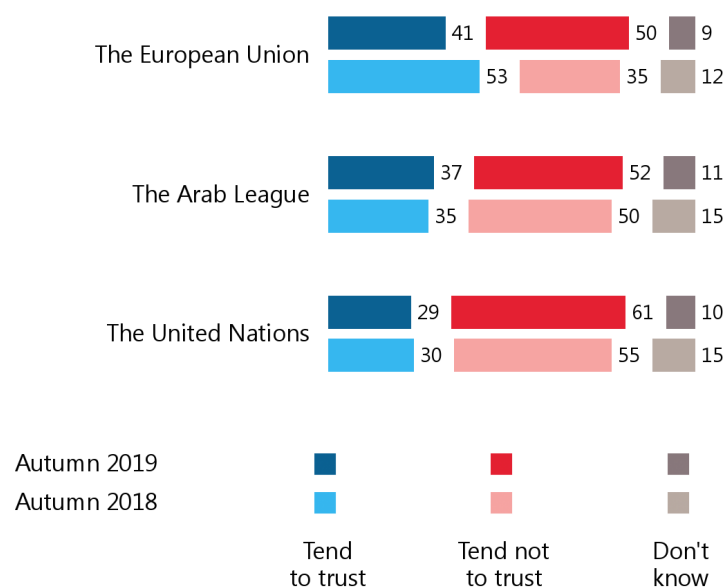
## Trust in the European Union

In both the Maghreb (41%) and the Mashrek (51%) respondents are most likely to say they trust the European Union<sup>17</sup>. More than one third in each country say they tend to trust the Arab League (the Maghreb: 37%, the Mashrek: 38%), with a slight majority in each group of countries saying they tend not to trust it. Respondents in the Maghreb (29%) are less likely to tend to trust the United Nations than those in the Mashrek (34%). In both cases the majority tend not to trust it.

The trends since autumn 2018 are mixed. In the Maghreb respondents are now much less likely to tend to trust the EU (-12 pp), while in the Mashrek they are more likely to do so (+6 pp). The only other notable change has been an increase in the proportion of respondents in the Mashrek who trust the United Nations (+5 pp).

**A17** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.

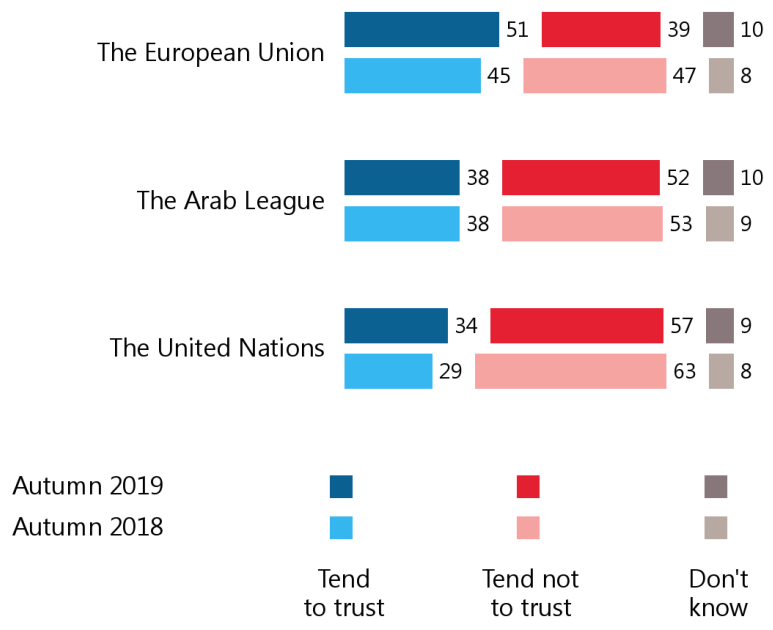
(% - **MAGHREB**)



Base: respondents Maghreb (N=3085)

<sup>17</sup> A17. I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it. The European Union; The Arab League; The United Nations.

**A17** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.  
 (% - MASHREK)






Base: respondents Mashrek (N=4000) \_

In the Maghreb, Morocco is the only country where at least half tend to trust the EU (59%). In Tunisia and Algeria, the majority tend not to trust it (54% and 64% respectively). Trust in the EU has declined in all three countries since Autumn 2018 – most significantly in Algeria where trust has declined 18 points and mistrust has increased 26 points.

**A17.1** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.

**The European Union (%)**





	Tend to trust	Aut. 2019 - Aut. 2018	Tend not to trust	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
<b>MAGHREB</b>	41	▼ 12	50	▲ 15	9	▼ 3
MA 	59	▼ 5	29	▲ 3	12	▲ 2
TN 	30	▼ 9	54	▲ 6	16	▲ 3
DZ 	31	▼ 18	64	▲ 26	5	▼ 8

Base: respondents Maghreb (N=3085)

The picture in the Mashrek is quite different, with trust in the EU increasing notably since Autumn 2018 in every country except Israel, where the increase is very slight (+1pp). Israel is also the only country where respondents are more likely to say they do not trust the EU (45% vs 39% who trust it).

**A17.1** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.

**The European Union (%)**



	Tend to trust	Aut. 2019 - Aut. 2018	Tend not to trust	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
<b>MASHREK</b>	51	▲ 6	39	▼ 8	10	▲ 2
LB 	65	▲ 13	31	▼ 13	4	=
JO 	50	▲ 13	41	▼ 19	9	▲ 6
PS 	66	▲ 9	29	▼ 5	5	▼ 4
IL 	39	▲ 1	45	▼ 3	16	▲ 2

Base: respondents Mashrek (N=4000)

In each country in the Maghreb, respondents are most likely to say they do not trust the United Nations. Compared to Autumn 2018 trust amongst respondents in Algeria has declined six points, while mistrust has increased by 16 points.

**A17.2** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.

**The United Nations (%)**





	Tend to trust	Aut. 2019 - Aut. 2018	Tend not to trust	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	29	▼ 1	61	▲ 6	10	▼ 5
MA 	37	▲ 2	47	▼ 3	16	▲ 1
TN 	23	=	61	▼ 2	16	▲ 2
DZ 	24	▼ 6	72	▲ 16	4	▼ 10

Base: respondents Maghreb (N=3085)

In the Mashrek, Lebanon (48%) is the only country where respondents are most likely to trust the United Nations, and in the other countries in Mashrek only a minority trust it. However, compared to Autumn 2018, trust has increased in each country – most notably in Lebanon and Jordan (both +7 pp).

**A17.2** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.

**The United Nations (%)**



	Tend to trust	Aut. 2019 - Aut. 2018	Tend not to trust	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	34	▲ 5	57	▼ 6	9	▲ 1
LB 	48	▲ 7	44	▼ 11	8	▲ 4
JO 	41	▲ 7	49	▼ 14	10	▲ 7
PS 	37	▲ 6	58	▲ 3	5	▼ 9
IL 	20	▲ 3	68	▼ 5	12	▲ 2

Base: respondents Mashrek (N=4000)

Trust in the Arab League varies considerably in the Maghreb: from 45% of respondents in Algeria compared to 18% in Tunisia say they trust the Arab League. In Algeria trust has increased since Autumn 2018 (+7 pp), while in Tunisia it has declined slightly (-4 pp).

**A17.3** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.

**The Arab League (%)**





	Tend to trust	Aut. 2019 - Aut. 2018	Tend not to trust	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	37	▲ 2	52	▲ 2	11	▼ 4
DZ 	45	▲ 7	51	▲ 3	4	▼ 10
MA 	36	=	47	=	17	=
TN 	18	▼ 4	65	▲ 2	17	▲ 2

*Base: respondents Maghreb (N=3085)*

As is the case in the countries in the Maghreb, in the Mashrek respondents in each country are more likely to mistrust the Arab league than to trust it. However, in Palestine (+6 pp) and Lebanon (+5 pp) trust has increased since Autumn 2018. In Jordan, on the other hand, trust has declined (-6 pp).

**A17.3** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.

**The Arab League (%)**

	Tend to trust	Aut. 2019 - Aut. 2018	Tend not to trust	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	38	=	52	▼ 1	10	▲ 1
PS 	43	▲ 6	49	▲ 3	8	▼ 9
LB 	36	▲ 5	54	▼ 9	10	▲ 4
IL 	0	=	0	=	0	=
JO 	37	▼ 6	53	▼ 1	10	▲ 7

*Base: respondents Mashrek (N=2463)*

The socio-demographic analysis illustrates the following:

- In the **Maghreb**, men are more likely to trust the EU than women (44% vs 38%).
- In the **Maghreb** 25-39 year olds are most likely to trust the EU, while 15-39 year olds are the most likely to trust the Arab League. In **Mashrek**, 15-24 year olds are the most likely to say they trust the EU (53%), the UN (38%) or the Arab League (40%) than their older cohorts.
- In **Maghreb** those who completed education aged 15 or younger are the most likely to trust the EU, but the least likely to trust the Arab League. People who are still studying are the most likely to trust the EU (44%). In **Mashrek**, those who completed education aged 15 or younger are the most likely to say they trust each institution/group.

Perhaps not surprisingly, respondents in both Maghreb and Mashrek who have relatives living in the EU, those who have a positive opinion of the EU, those who think their country has a good relationship with the EU or those who feel well-informed about the EU are more likely to trust it.



**A17** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.  
 (% - **MAGHREB**)

	The European Union		The United Nations		The Arab League	
	Tend to trust	Tend not to trust	Tend to trust	Tend not to trust	Tend to trust	Tend not to trust
MASHREK	41	50	29	61	37	52
 Gender						
Male	44	49	30	62	36	55
Female	38	51	28	60	39	49
 Age						
15-24 years	46	47	30	62	39	51
25-39 years	38	53	28	63	40	50
40-54 years	44	47	30	60	36	55
55 years or more	35	52	28	57	32	54
 Education (End of)						
15-	42	50	30	60	33	57
16-19	38	57	30	64	43	50
20 or more	32	62	25	68	37	58
Still studying	44	47	29	62	40	48
<b>Relatives living in the EU</b>						
Yes	46	48	31	63	40	53
No	36	53	26	60	35	51
 Opinion of the EU						
Positive	55	39	38	54	40	52
Neutral	36	56	27	65	39	52
Negative	23	71	16	78	38	54
<b>Relations between EU and country</b>						
Good	52	42	36	57	43	49
Bad	24	70	18	75	33	60
<b>Informed about the EU</b>						
Well-informed	53	43	36	59	42	52
Not informed	33	56	24	64	35	53

**A17** I would like to ask you a question about how much trust you have in certain institutions. Please tell me if you tend to trust or tend not to trust each of the following institutions.  
 (% - MASHREK)

	The European Union		The United Nations		The Arab League	
	Tend to trust	Tend not to trust	Tend to trust	Tend not to trust	Tend to trust	Tend not to trust
MASHREK	51	39	34	57	38	52
 Gender						
Male	51	41	32	60	38	52
Female	51	37	35	54	39	52
 Age						
15-24 years	53	35	38	49	40	49
25-39 years	52	39	35	57	38	52
40-54 years	50	40	33	58	38	53
55 years or more	49	43	26	67	35	58
 Education (End of)						
15-	56	36	43	48	42	47
16-19	50	38	32	58	37	53
20 or more	53	39	31	61	38	56
Still studying	51	38	34	54	39	51
<b>Relatives living in the EU</b>						
Yes	60	34	35	59	37	55
No	48	41	33	57	39	51
 Opinion of the EU						
Positive	70	25	45	49	43	49
Neutral	44	41	28	60	36	55
Negative	16	77	13	81	26	66
<b>Relations between EU and country</b>						
Good	63	31	42	51	41	51
Bad	27	65	17	76	33	59
<b>Informed about the EU</b>						
Well-informed	56	37	35	58	40	52
Not informed	47	41	33	56	37	53

## 5. The European Union as a partner

### **Image of the European Union as a partner**

Respondents were asked the extent to which they agreed or disagreed with a number of statements about the European Union<sup>18</sup>. Respondents in the Mashrek are more likely to agree with each statement, although the differences vary.

There is little difference between the Maghreb and the Mashrek in the proportions of respondents who agree the European Union has the appropriate level of involvement in their country (48% vs 53%), or in the region surrounding their country (49% vs 54%).

There is slightly more difference in the proportions of respondents who agree with the remaining statements:

- The European Union brings peace and stability in the region surrounding their country (Maghreb: 42%, Mashrek: 47%);
- The support of the European Union contributes a lot to the development of their country (Maghreb: 49%, Mashrek: 54%);
- The European Union is an important partner of their country (Maghreb: 55%, Mashrek: 61%);
- Their country and the European Union have sufficient common values to be able to cooperate (Maghreb: 56%, Mashrek: 66%).

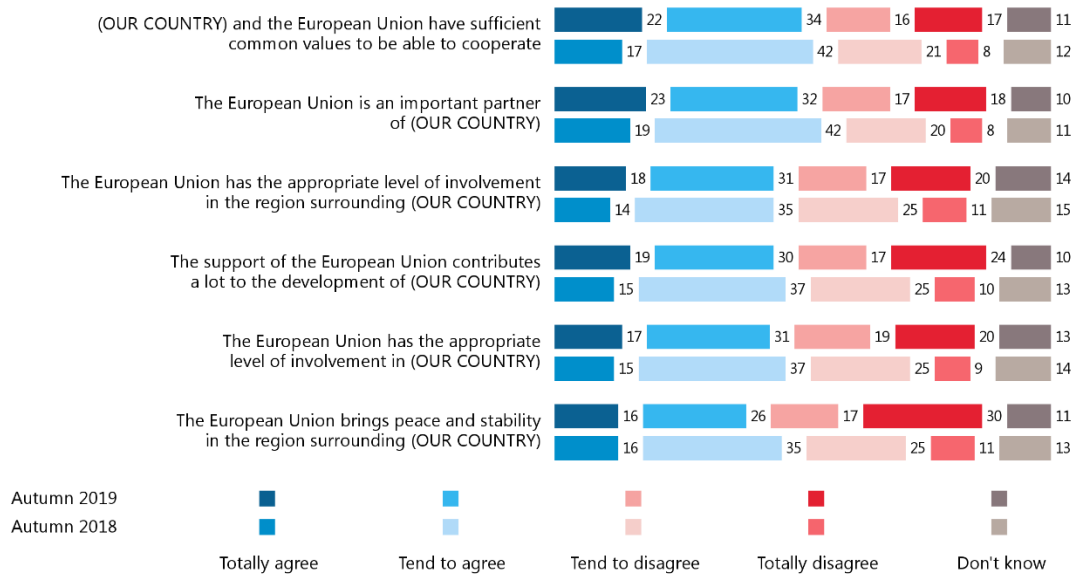
Compared to summer 2018, respondents in the Maghreb are now less likely to agree that the European Union brings peace and stability in the region surrounding their country (-9 pp), or that it is an important partner for their country (-6 pp).

In the Mashrek, on the other hand, opinions have become more positive, with respondents more likely to agree the EU brings peace and stability in the region surrounding their country, that it has the appropriate level of involvement in their country, or that their country and the European Union have sufficient common values to be able to cooperate (+5 pp in each case).

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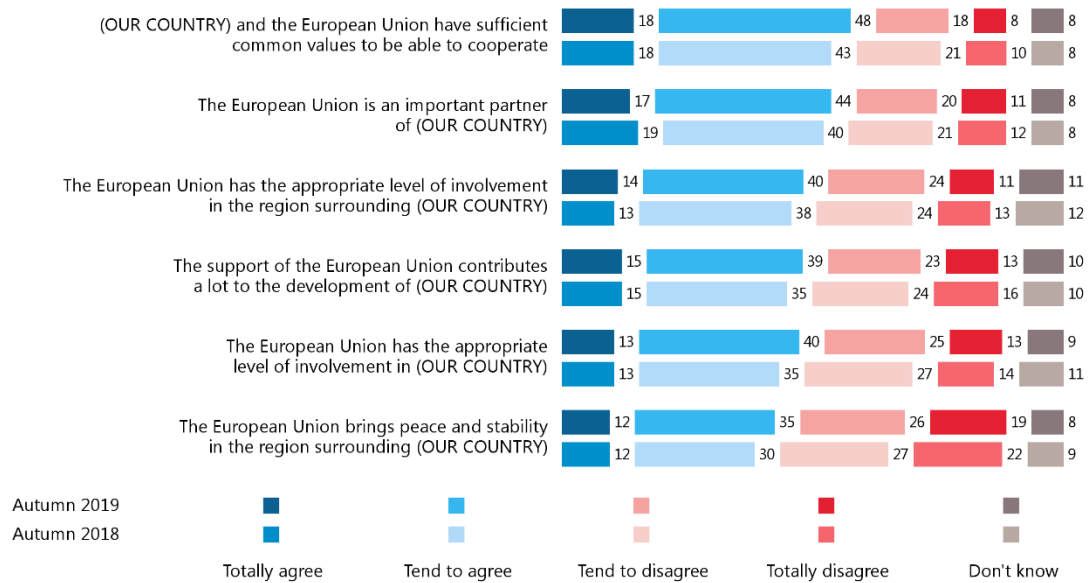
<sup>18</sup> A13. Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union? 13.1 The European Union has the appropriate level of involvement in (OUR COUNTRY); 13.2 The European Union has the appropriate level of involvement in the region surrounding (OUR COUNTRY); 13.3 The European Union brings peace and stability in the region surrounding (OUR COUNTRY); 13.4 The European Union is an important partner of (OUR COUNTRY); 13.5 (OUR COUNTRY) and the European Union have sufficient common values to be able to cooperate; 13.6 The support of the European Union contributes a lot to the development of (OUR COUNTRY).

**A13** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?  
 (% - **MAGHREB**)



Base: respondents Maghreb (N=3085)

**A13** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?  
 (% - **MASHREK**)



Base: respondents Mashrek (N=4000)

Respondents in Morocco are consistently the most likely to agree with each statement, and in all but one case agreement has increased since Autumn 2018. The exception is the statement “the EU and our country have sufficient common values to be able to cooperate”, which has seen a 3-percentage point decrease though it is the only statement a majority in all countries agrees with.

In contrast, respondents in Algeria are consistently the least likely to agree with each statement. In addition, agreement with each statement has declined since Autumn 2018, with the largest a 19-point drop in the proportion of respondents who agree the EU brings peace and stability in the region surrounding their country.

**A13.1** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?

**The European Union has the appropriate level of involvement in (OUR COUNTRY) (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	48	▼ 4	39	▲ 5	13	▼ 1
MA	65	▲ 3	25	▲ 1	10	▼ 4
TN	43	▼ 3	37	▼ 1	20	▲ 4
DZ	37	▼ 10	50	▲ 10	13	=

**A13.2** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?

**The European Union has the appropriate level of involvement in the region surrounding (OUR COUNTRY) (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	49	=	37	▲ 1	14	▼ 1
MA	64	▲ 5	26	▼ 2	10	▼ 3
TN	40	▲ 1	39	▼ 3	21	▲ 2
DZ	40	▼ 6	45	▲ 5	15	▲ 1

**A13.3** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?

**The European Union brings peace and stability in the region surrounding (OUR COUNTRY) (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	42	▼ 9	47	▲ 11	11	▼ 2
MA	67	▲ 2	24	▲ 1	9	▼ 3
TN	36	=	44	▼ 4	20	▲ 4
DZ	26	▼ 19	64	▲ 21	10	▼ 2

**A13.4** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?

**The European Union is an important partner of (OUR COUNTRY) (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	55	▼ 6	35	▲ 7	10	▼ 1
MA	66	▲ 1	25	▲ 2	9	▼ 3
TN	51	▼ 6	30	▼ 1	19	▲ 7
DZ	49	▼ 10	43	▲ 13	8	▼ 3

**A13.5** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?

**(OUR COUNTRY) and the European Union have sufficient common values to be able to cooperate (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	56	▼ 3	33	▲ 4	11	▼ 1
MA	63	=	27	▲ 2	10	▼ 2
TN	50	=	31	▼ 4	19	▲ 4
DZ	53	▼ 6	38	▲ 8	9	▼ 2

**A13.6** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?

**The support of the European Union contributes a lot to the development of (OUR COUNTRY) (%)**





	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	49	▼ 3	41	▲ 6	10	▼ 3
MA	67	▲ 5	23	▼ 1	10	▼ 4
TN	40	▲ 2	41	▼ 6	19	▲ 4
DZ	38	▼ 11	54	▲ 15	8	▼ 4

With the exception of *Base: Respondents Maghreb (N=3085)* the statement “the EU and our country have sufficient common value to be able to cooperate”, respondents in Israel





are much less likely to agree with each statement than those in the other countries in the Mashrek. In fact, as was the case in the Maghreb, this is the only statement that a majority in all countries agrees with.

Compared to Autumn 2018, respondents in each country in the Mashrek are now more likely to agree with each statement, with the exception of Palestine for the statement “The European Union has the appropriate level of involvement in the region...”. The largest increases are observed in Lebanon, particularly for the statement “the EU brings peace and stability in the region surrounding our country” (+17 pp). The only exception is in Palestine, where there has been no change when it comes to the EU having an appropriate level of involvement in the region surrounding their country.





**A13.1** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?  
**The European Union has the appropriate level of involvement in (OUR COUNTRY) (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	53	▲ 5	38	▼ 3	9	▼ 2
LB 	70	▲ 14	25	▼ 17	5	▲ 3
JO 	67	▲ 10	26	▼ 3	7	▼ 7
PS 	65	▲ 4	31	▼ 1	4	▼ 3
IL 	30	▲ 1	55	▼ 1	15	=





**A13.3** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?  
**The European Union brings peace and stability in the region surrounding (OUR COUNTRY) (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	47	▲ 5	45	▼ 4	8	▼ 1
LB 	66	▲ 17	28	▼ 19	6	▲ 2
JO 	53	▲ 8	40	▼ 6	7	▼ 2
PS 	65	▲ 6	32	▼ 2	3	▼ 4
IL 	25	▲ 2	63	▼ 1	12	▼ 1





**A13.5** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?  
**(OUR COUNTRY) and the European Union have sufficient common values to be able to cooperate (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	66	▲ 5	26	▼ 5	8	=
LB 	69	▲ 10	24	▼ 12	7	▲ 2
IL 	65	▲ 5	24	▼ 6	11	▲ 1
PS 	66	▲ 4	31	=	3	▼ 4
JO 	65	▲ 1	27	=	8	▼ 1





**A13.2** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?  
**The European Union has the appropriate level of involvement in the region surrounding (OUR COUNTRY) (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	54	▲ 3	35	▼ 2	11	▼ 1
LB 	66	▲ 12	26	▼ 14	8	▲ 2
JO 	64	▲ 10	27	▼ 3	9	▼ 7
IL 	37	▲ 1	46	▼ 4	17	▲ 3
PS 	65	=	31	▲ 2	4	▼ 2

**A13.4** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?  
**The European Union is an important partner of (OUR COUNTRY) (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	61	▲ 2	31	▼ 2	8	=
LB 	71	▲ 9	23	▼ 12	6	▲ 3
PS 	67	▲ 4	31	=	2	▼ 4
IL 	51	▲ 2	36	▼ 3	13	▲ 1
JO 	66	▲ 1	27	▼ 1	7	=

**A13.6** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?  
**The support of the European Union contributes a lot to the development of (OUR COUNTRY) (%)**

	Total 'Agree'	Aut. 2019 - Aut. 2018	Total 'Disagree'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	54	▲ 4	36	▼ 4	10	=
LB 	67	▲ 12	27	▼ 14	6	▲ 2
PS 	69	▲ 6	29	▼ 2	2	▼ 4
JO 	66	▲ 5	27	▼ 4	7	▼ 1
IL 	34	▲ 4	48	▼ 4	18	=

Base: Respondents Mashrek (N=4000)

The only consistent patterns from the socio-demographic analysis is that both in the Maghreb and the Mashrek respondents who have a positive opinion about the EU, who say relations between the EU and their country are good, or who feel well-informed about the EU are the most likely to agree with each statement.

Other results from the analysis include:

- In the **Maghreb**, men are more likely to agree the EU is an important partner of their country (59% vs 52%). In the **Mashrek**, men are more likely than women to agree their country and the European Union have sufficient common values to be able to cooperate (69% vs 64%).
- In the **Maghreb**, respondents 55 or older are the least likely to agree with any of the statements.
- In the **Maghreb**, respondents who completed education earliest or who are still studying are the most likely to agree with each statement. In the **Mashrek**, it is respondents who completed education aged 15 or younger who are the most likely to agree compared to those who finished aged 16 or older.
- In the **Maghreb**, respondents living in small/mid-sized towns are the least likely to agree with each statement.
- In the **Mashrek**, respondents with relatives living in the EU are more likely to agree with each statement than those without. In the **Maghreb**, on the other hand, this only applies for the statements "the European Union is an important partner of our country" (58% vs 52%) and "our country and the European Union have sufficient common values to be able to cooperate" (60% vs 54%).

**A13** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?

(% - **MAGHREB**)

	The European Union has the appropriate level of involvement in (OUR COUNTRY)	The European Union has the appropriate level of involvement in the region surrounding (OUR COUNTRY)	The European Union brings peace and stability in the region surrounding (OUR COUNTRY)	The European Union is an important partner of (OUR COUNTRY)	(OUR COUNTRY) and the European Union have sufficient common values to be able to cooperate	The support of the European Union contributes a lot to the development of (OUR COUNTRY)
	Total 'Agree'	Total 'Agree'	Total 'Agree'	Total 'Agree'	Total 'Agree'	Total 'Agree'
MAGHREB	48	49	42	55	56	49
<b>Gender</b>						
Male	49	50	44	59	58	48
Female	46	48	41	52	55	49
<b>Age</b>						
15-24 years	48	50	48	57	59	52
25-39 years	53	52	43	59	60	52
40-54 years	48	49	43	54	55	48
55 years or more	37	40	33	46	48	36
<b>Education (End of)</b>						
15-	51	49	46	55	56	51
16-19	47	46	43	55	58	45
20 or more	42	44	32	53	51	42
Still studying	47	50	43	61	58	50
<b>Subjective urbanisation</b>						
Rural area or village	50	52	46	56	59	52
Small/mid size town	33	34	22	43	45	30
Large town	51	51	46	58	58	51
<b>Relatives living in the EU</b>						
Yes	49	49	41	58	60	48
No	47	49	44	52	54	49
<b>Opinion of the EU</b>						
Positive	62	63	55	68	69	61
Neutral	42	43	39	50	55	44
Negative	34	36	26	46	40	31
<b>Relations between EU and country</b>						
Good	59	59	53	68	68	60
Bad	32	36	24	39	42	30
<b>Informed about the EU</b>						
Well-informed	58	59	52	66	67	58
Not informed	42	42	37	48	50	43



**A13** Could you tell me to what extent you agree or disagree with each of the following statements concerning the European Union?

(% - MASHREK)

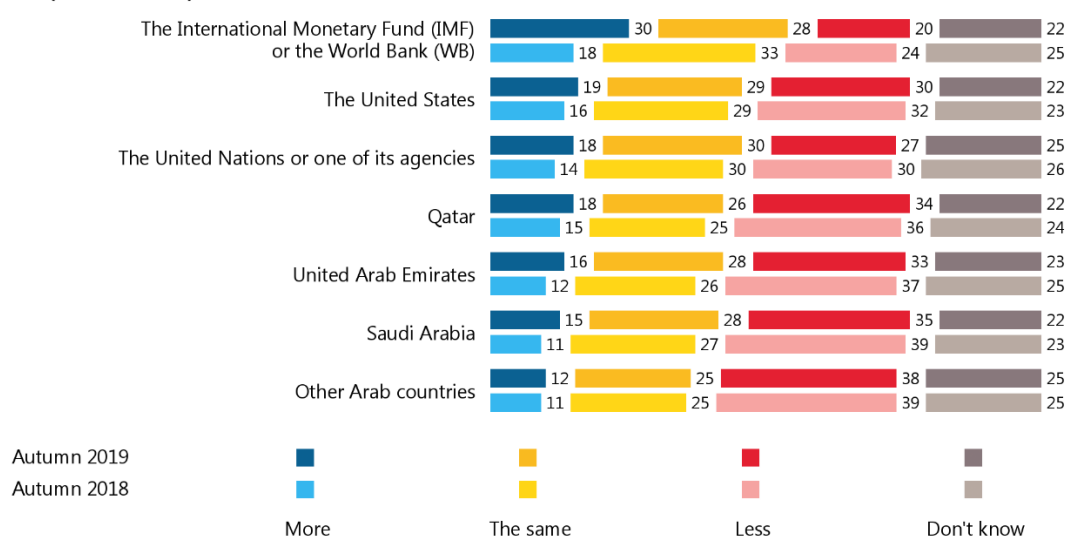
	The European Union has the appropriate level of involvement in (OUR COUNTRY)	The European Union has the appropriate level of involvement in the region surrounding (OUR COUNTRY)	The European Union brings peace and stability in the region surrounding (OUR COUNTRY)	The European Union is an important partner of (OUR COUNTRY)	(OUR COUNTRY) and the European Union have sufficient common values to be able to cooperate	The support of the European Union contributes a lot to the development of (OUR COUNTRY)
	Total 'Agree'	Total 'Agree'	Total 'Agree'	Total 'Agree'	Total 'Agree'	Total 'Agree'
MASHREK	53	54	47	61	66	54
<b>Gender</b>						
Male	54	56	48	63	69	55
Female	52	52	46	60	64	54
<b>Age</b>						
15-24 years	55	53	47	60	64	56
25-39 years	53	56	48	62	65	56
40-54 years	53	54	47	64	67	56
55 years or more	52	54	43	60	69	48
<b>Education (End of)</b>						
15-	67	66	62	66	66	68
16-19	50	53	43	61	67	52
20 or more	52	54	46	62	69	53
Still studying	53	51	46	59	60	55
<b>Subjective urbanisation</b>						
Rural area or village	52	53	45	62	67	53
Small/mid size town	53	53	45	61	63	53
Large town	54	55	47	61	68	55
<b>Relatives living in the EU</b>						
Yes	58	59	51	67	71	61
No	52	53	45	59	65	53
<b>Opinion of the EU</b>						
Positive	71	69	64	77	78	72
Neutral	42	45	39	54	62	46
Negative	28	35	17	37	49	26
<b>Relations between EU and country</b>						
Good	68	67	60	75	76	69
Bad	26	33	20	37	51	28
<b>Informed about the EU</b>						
Well-informed	57	60	51	69	74	60
Not informed	50	50	43	54	60	50

## Perceptions of comparative financial support

Three in ten (30%) respondents in the Maghreb say the IMF/World bank provide more financial support to their country than the EU<sup>19</sup>. This is the only country or institution that at least one in five respondents say provides more financial support than the EU. The United States is the next most mentioned as providing more financial support than the EU (19%), followed by the UN or one of its agencies and Qatar (both 18%), the United Arab Emirates (16%), Saudi Arabia (15%) and other Arab countries (12%). In each case at least one quarter of respondents say the same amount of support is provided. It is also worth noting that at least one in five say they don't know in each case.

The most notable change since Autumn 2018 is a 12-point increase in the proportion of respondents in the Maghreb who say the IMF/World Bank provides more financial support than the EU.

**A16** As far as you know, would you say that each of the following international institutions or countries provides more, the same, or less financial support to (OUR COUNTRY) than the European Union?  
(% - MAGHREB)



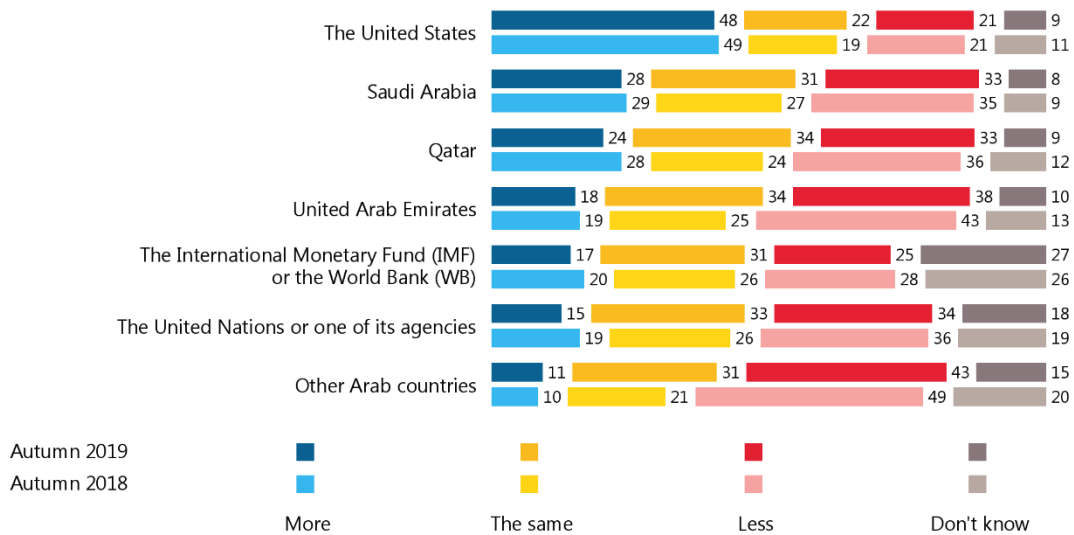
Base: respondents Maghreb (N=3085)

<sup>19</sup> QA16 As far as you know, would you say that each of the following international institutions or countries provides more, the same, or less financial support to (OUR COUNTRY) than the European Union? 16.1 The United States; 16.2 Saudi Arabia; 16.3 Qatar; 16.4 United Arab Emirates; 16.5 Other Arab countries; 16.6 The United Nations or one of its agencies; 16.7 The International Monetary Fund (IMF) or the World Bank (WB).

The picture is quite different in the Mashrek. Here, almost half (48%) say the United States provides more financial support to their country than the EU. Saudi Arabia (28%) and Qatar (24%) are the only other countries where at least one in five think more support is provided. Almost one in five (18%) say the United Arab Emirates provide more support to their country than the EU, while 17% say this about the IMF/World Bank, 15% say this about the United Nations or one of its agencies, and 11% say this about other Arab countries. In each case at least one in five say the country or institution provides the same amount of support as the EU, and respondents are much more likely to be unsure about the IMF/World Bank than other countries or institutions.

There have only been small changes since Autumn 2018 in the proportions who think each institution or country provides more support. The largest change is a four-point decline in the proportion who say Qatar or the United Nations or one of its agencies provides more support. However, it is worth noting that in the case of Qatar, the United Arab Emirates and other Arab countries there have been notable increases in the proportions of respondents who say the same amount of support is provided. For instance, in the case of other Arab counties, there has been a 10-percentage point increase in the proportion of respondents who say the same amount of support is provided. In the case of the United Arab Emirates and other Arab countries there have also been declines in the proportions of respondents who say less support is provided, compared to the EU.

**A16** As far as you know, would you say that each of the following international institutions or countries provides more, the same, or less financial support to (OUR COUNTRY) than the European Union?  
(% - MASHREK)



Base: respondents Mashrek (N=4000, 2463)




The country-level analysis focuses on the three countries or institutions most often mentioned as providing more support than the EU.

In the Maghreb, respondents in Algeria are most likely to say the IMF/World bank provides more (34%) financial support than the EU, and that the United States and the United Nations or one of its agencies provide less (43% and 36% respectively). In Tunisia and Morocco, respondents are most likely to say each institution or country provides the same amount of support.

Compared to Autumn 2018, respondents in Algeria are now much more likely to say the IMF/World Bank provides more support (+19 pp), and they are also more likely to say this about the UN or one of its agencies (+6 pp). Respondents in Tunisia are now less likely to say each of these countries or institutions provides less support, and more likely to say they provide the same amount.




**A16.7** As far as you know, would you say that each of the following international institutions or countries provides more, the same, or less financial support to (OUR COUNTRY) than the European Union?

**The International Monetary Fund (IMF) or the World Bank (WB) (%)**

	More	Aut. 2019 - Aut. 2018	The same	Aut. 2019 - Aut. 2018	Less	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	30	▲12	28	▼5	20	▼4	22	▼3
DZ 	34	▲19	18	▼11	26	▼4	22	▼4
MA 	26	▲8	40	▼1	14	▼1	20	▼6
TN 	25	▼4	33	▲6	15	▼8	27	▲6




**A16.1** As far as you know, would you say that each of the following international institutions or countries provides more, the same, or less financial support to (OUR COUNTRY) than the European Union?

**The United States (%)**

	More	Aut. 2019 - Aut. 2018	The same	Aut. 2019 - Aut. 2018	Less	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	19	▲3	29	=	30	▼2	22	▼1
MA 	27	▲3	40	▲2	16	▼4	17	▼1
DZ 	16	▲3	18	▼4	43	▲4	23	▼3
TN 	12	=	34	▲8	23	▼14	31	▲6

**A16.6** As far as you know, would you say that each of the following international institutions or countries provides more, the same, or less financial support to (OUR COUNTRY) than the European Union?

**The United Nations or one of its agencies (%)**

	More	Aut. 2019 - Aut. 2018	The same	Aut. 2019 - Aut. 2018	Less	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	18	▲4	30	=	27	▼3	25	▼1
DZ 	17	▲6	20	▼5	36	=	27	▼1
MA 	22	▲3	40	▲1	19	=	19	▼4
TN 	12	▲2	36	▲8	20	▼15	32	▲5

Base: Respondents Maghreb (N=3085)

In the Mashrek, respondents in Israel are much more likely to say the United States provides more financial support than the EU, particularly compared to respondents in Lebanon (88% vs 10%).





In Palestine, respondents most often say the United States provides less support (42%), that Saudi Arabia provides the same or more support (both 36%), and that Qatar provides the same amount of support (40%) as the EU. In Lebanon, respondents most often say the United States (43%) and Saudi Arabia (36%) provide less support, and Qatar the same amount (36%). In Jordan the most common responses are that the United States provides more support (34%), that Qatar provides less (39%), and opinion about Saudi Arabia is split between more and less support (30% in each case), with 29% saying it provides the same support as the European Union.

The largest changes in opinion since Autumn 2018 are seen in Jordan, and particularly in the proportions of respondents who think each country or institution provides the same amount of financial support. For example, there has been a 14-point decline in the proportion who say the US provides more financial support than the EU, and a 14-point increase in the proportion who say it provides the same amount.

Respondents in Lebanon are now more likely to say the United States provides the same amount of support (+9 pp), and less likely to say Qatar provides less financial support (-7 pp).

**A16.1** As far as you know, would you say that each of the following international institutions or countries provides more, the same, or less financial support to (OUR COUNTRY) than the European Union?





**The United States (%)**

	More	Aut. 2019 - Aut. 2018	The same	Aut. 2019 - Aut. 2018	Less	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	48	▼ 1	22	▲ 3	21	=	9	▼ 2
IL 	88	▲ 4	3	▼ 3	1	=	8	▼ 1
PS 	21	▼ 2	31	▲ 2	42	▲ 6	6	▼ 6
LB 	10	▼ 3	40	▲ 9	43	▼ 3	7	▼ 3
JO 	34	▼ 14	33	▲ 14	21	▲ 1	12	▼ 1

Base: Respondents Mashrek (N=4000)

**A16.2** As far as you know, would you say that each of the following international institutions or countries provides more, the same, or less financial support to (OUR COUNTRY) than the European Union?





**Saudi Arabia (%)**

	More	Aut. 2019 - Aut. 2018	The same	Aut. 2019 - Aut. 2018	Less	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	28	▼ 1	31	▲ 4	33	▼ 2	8	▼ 1
PS 	22	▲ 4	36	▼ 1	36	=	6	▼ 3
IL 	0	=	0	=	0	=	0	=
LB 	28	▼ 1	31	▼ 1	36	▲ 5	5	▼ 3
JO 	30	▼ 8	29	▲ 14	30	▼ 7	11	▲ 1

Base: Respondents Mashrek (N=2463)

**A16.3** As far as you know, would you say that each of the following international institutions or countries provides more, the same, or less financial support to (OUR COUNTRY) than the European Union?

**Qatar (%)**

	More	Aut. 2019 - Aut. 2018	The same	Aut. 2019 - Aut. 2018	Less	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	24	▼ 4	34	▲ 10	33	▼ 3	9	▼ 3
LB 	22	▲ 4	36	▲ 5	35	▼ 7	7	▼ 2
PS 	36	▲ 3	40	▲ 7	21	▼ 3	3	▼ 7
IL 	0	=	0	=	0	=	0	=
JO 	19	▼ 11	29	▲ 16	39	▼ 4	13	▼ 1

Base: Respondents Mashrek (N=2463)

## 6. Main areas of cooperation

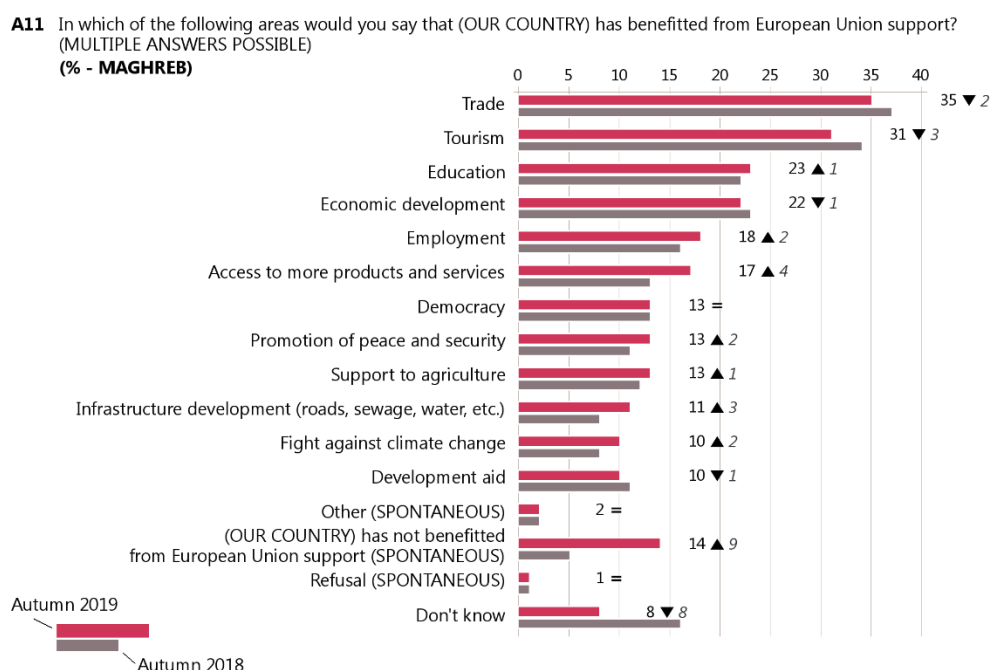
### Areas perceived as benefitting from EU support

Respondents were asked about the areas where they felt their country had benefited from EU support<sup>20</sup>. Trade, tourism, education and economic development feature in the top five in both the Maghreb and the Mashrek.

The five most mentioned areas by respondents in the Maghreb are trade (35%), tourism (31%), education (23%), economic development (22%) and employment (18%). In the Mashrek the most mentioned areas are tourism, economic development (both 26%), education (25%), trade (20%) and infrastructure development (19%).

Trade is much more likely to be mentioned by respondents in the Maghreb (35%) than the Mashrek (20%) as are tourism (Maghreb: 31%, Mashrek: 26%) and employment (Maghreb: 18%, Mashrek: 13%). In contrast, respondents in the Mashrek are more likely than their counterparts in the Maghreb to mention infrastructure development (19% vs 11%).

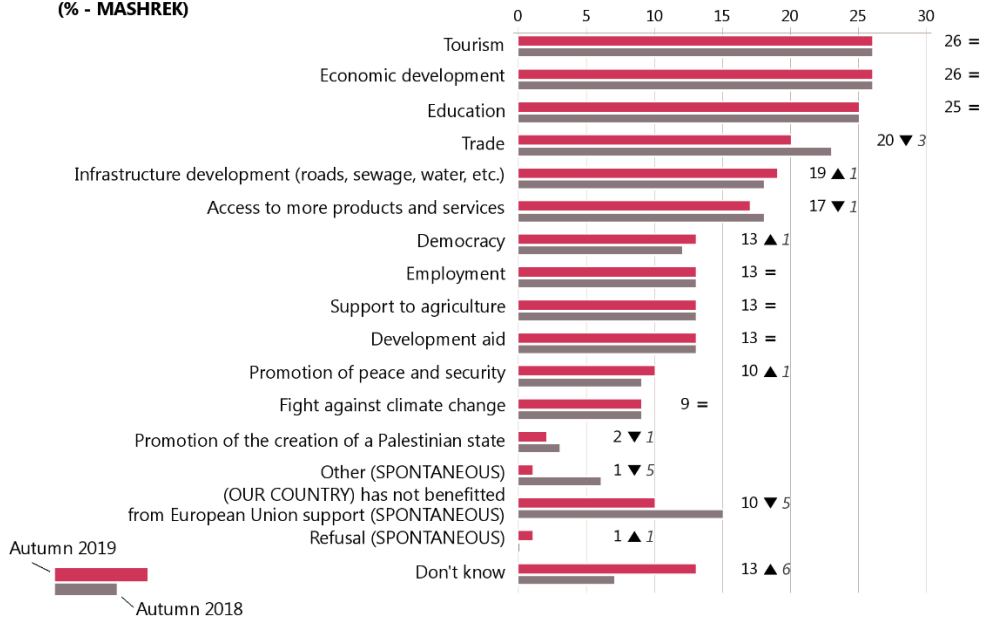
Comparing the current results to those from 2018 shows generally small changes (1-4 pp). However, respondents in the Maghreb are now more likely to say their country has not benefited from EU support (+9 pp), while those in the Mashrek are now less likely to say this (-5 pp).



Base: respondents Maghreb (N=3085)

<sup>20</sup> A11. In which of the following areas would you say that (OUR COUNTRY) has benefited from European Union support?

**A11** In which of the following areas would you say that (OUR COUNTRY) has benefitted from European Union support?  
 (MULTIPLE ANSWERS POSSIBLE)  
 (% - MASHREK)






Base: respondents Mashrek (N=4000)

The country analysis focuses on the top eight areas where respondents feel their country has benefited from EU support.

Respondents in Tunisia are the most likely to mention tourism (43%), and this is also the most mentioned answer in Morocco (35%). Respondents in Morocco are also more likely to mention economic development (26%) than respondents in other countries. All the other areas are most often mentioned by respondents in Algeria, and this is particularly the case for trade (41%).

Compared to Autumn 2018, respondents in Morocco are now more likely to mention economic development (+6 pp), but they are less likely to mention tourism (-9 pp). Those in Algeria are more likely to mention access to more products and services (+9 pp), but there has also been a notable increase in the proportion who say their country has not benefited from EU support (+12 pp). In Tunisia there has been an even larger increase in the proportion who say their country has not benefited from EU support (+17 pp).

**A11** In which of the following areas would you say that (OUR COUNTRY) has benefitted from European Union support?  
(MULTIPLE ANSWERS POSSIBLE)  
(%)

	Trade	Aut. 2019 - Aut. 2018	Tourism	Aut. 2019 - Aut. 2018	Education	Aut. 2019 - Aut. 2018	Economic development	Aut. 2019 - Aut. 2018	Employment	Aut. 2019 - Aut. 2018	Access to more products and services	Aut. 2019 - Aut. 2018	Democracy	Aut. 2019 - Aut. 2018	Promotion of peace and security	Aut. 2019 - Aut. 2018	(OUR COUNTRY) has not benefited from European Union support (SPONTANEOUS)	Aut. 2019 - Aut. 2018
MAGHREB	35	▼ 2	31	▼ 3	23	▲ 1	22	▼ 1	18	▲ 2	17	▲ 4	13	=	13	▲ 2	14	▲ 9
MA 	32	▼ 2	35	▼ 9	21	▲ 2	26	▲ 6	18	▲ 3	9	▲ 1	12	▲ 3	10	▲ 3	8	▲ 3
DZ 	41	▼ 2	25	=	27	▲ 2	22	▼ 4	19	▲ 3	27	▲ 9	15	▼ 2	19	▲ 3	18	▲ 12
TN 	23	▲ 3	43	▲ 3	14	▼ 4	13	▼ 8	13	▼ 4	7	▲ 1	10	▼ 3	1	▼ 6	17	▲ 17

Base: respondents Maghreb (N=3085)



In the Mashrek, respondents in Israel are the most likely to mention tourism (39%), trade (31%) and access to more products and services (23%). Those in Jordan are the most likely to mention education (43%), while respondents in Lebanon are the most likely to mention economic development (33%), support to agriculture (28%), democracy (23%) and development aid (19%). Respondents in Palestine are the most likely in the Mashrek to mention infrastructure development (33%) and employment (25%).

There have been a number of changes since Autumn 2018. Respondents in Israel are now less likely to mention access to more products and services (-6 pp) or trade (-5 pp). Those in Jordan are more likely to mention education (+8 pp), but less likely to mention tourism (-9 pp). In Lebanon, respondents are more likely to mention almost all of these areas, and in particular support to agriculture and infrastructure development (both +10 pp). The main exception is trade (-5 pp). In Palestine the largest change is a nine-point decrease in the mentions of trade. In fact, Jordan (no change) is the only country in the Mashrek where mentions of trade have not declined.

**A11** In which of the following areas would you say that (OUR COUNTRY) has benefitted from European Union support? (MULTIPLE ANSWERS POSSIBLE) (%)

	Tourism	Economic development	Education	Trade	Infrastructure development (roads, sewage, water, etc.)	Access to more products and services	Democracy	Employment	Support to agriculture	Development aid
	Aut. 2019 - Aut. 2018	Aut. 2019 - Aut. 2018	Aut. 2019 - Aut. 2018	Aut. 2019 - Aut. 2018	Aut. 2019 - Aut. 2018	Aut. 2019 - Aut. 2018	Aut. 2019 - Aut. 2018	Aut. 2019 - Aut. 2018	Aut. 2019 - Aut. 2018	Aut. 2019 - Aut. 2018
MASHREK	26	26	25	20	19	17	13	13	13	13
IL	39	21	6	31	7	23	12	7	9	10
JO	20	30	43	13	18	8	12	13	5	10
LB	28	33	30	14	31	21	23	14	28	19
PS	8	24	33	9	33	13	9	25	19	18

Base: respondents Mashrek (N=4000)

The socio-demographic analysis focuses on the four most mentioned areas in each group.

### Maghreb

- Respondents younger than 55 are more likely to say their country has benefited from EU support in the area of trade than the oldest of respondents: for example, 39% of 15-24 year olds say this, compared to 29% of those aged 55 and older.
- Respondents who completed education aged 16 or older are the most likely to mention trade, while those who completed aged 20 or older are the most likely to mention education (25%).
- Respondents living in small or mid-sized towns are the least likely to mention each option, and particularly education and economic development.

In addition, respondents who have a positive opinion of the EU are more likely to mention each area than those with a negative image, except for the “fight against climate change” which is most often mentioned by respondents with a negative view of the EU. Finally, respondents who think relations between their country and the EU are good, and who feel informed about the EU are the most likely to mention each area.

### **Mashrek**

- Respondents aged 55 and older are more likely than younger age groups to say their country has benefited from EU support in the area of tourism (34%) and trade (28%).
- Respondents who completed education age 15 or younger are the most likely to mention education and economic development, and the least likely to mention tourism or trade.
- Retired persons are more likely than other occupation groups to mention tourism (38%) or trade (35%).
- Respondents who experience the least difficulties paying bills are the most likely to mention tourism (33%) or trade (24%).

In addition, respondents with relatives living in the EU are more likely to mention tourism, (30% vs 25% who do not have relatives in the EU) or economic development (31% vs 25%). Those with a positive attitude towards the EU, or who say the EU’s relations with their country are good are more likely to mention tourism, economic development and education. Finally, those who feel well informed about the EU are more likely to mention tourism, economic development and trade than those who do not feel informed.

**A11** In which of the following areas would you say that (OUR COUNTRY) has benefitted from European Union support? (MULTIPLE ANSWERS POSSIBLE)  
(% - **MAGHREB**)

	Economic development	Tourism	Trade	Education
MAGHREB	22	31	35	23
Gender				
Male	22	30	36	22
Female	22	32	34	25
Age				
15-24 years	24	33	39	25
25-39 years	22	32	37	23
40-54 years	22	31	35	22
55 years or more	20	27	29	22
Education (End of)				
15-	17	32	32	22
16-19	19	32	40	23
20 or more	23	28	38	25
Still studying	26	33	39	26
Subjective urbanisation				
Rural area or village	24	33	32	24
Small/mid size town	16	25	30	21
Large town	22	31	39	24
Occupation				
Self-employed	24	30	38	23
Managers	25	36	38	27
White collars	19	28	33	21
Manual workers	21	33	33	23
House persons	18	32	34	20
Unemployed	22	29	34	23
Retired	20	30	36	24
Students	26	33	39	26
Difficulties paying bills				
Most of the time	18	28	32	23
From time to time	21	34	35	22
Almost never/ never	25	29	37	24
<b>Relatives living in the EU</b>				
Yes	23	30	35	26
No	21	33	35	20
Opinion of the EU				
Positive	27	34	39	25
Neutral	21	34	38	26
Negative	18	23	29	20
<b>Relations between EU and country</b>				
Good	28	38	40	27
Bad	14	22	32	19
<b>Informed about the EU</b>				
Well-informed	27	35	40	27
Not informed	19	29	33	21

**A11** In which of the following areas would you say that (OUR COUNTRY) has benefitted from European Union support? (MULTIPLE ANSWERS POSSIBLE)  
(% - **MASHREK**)

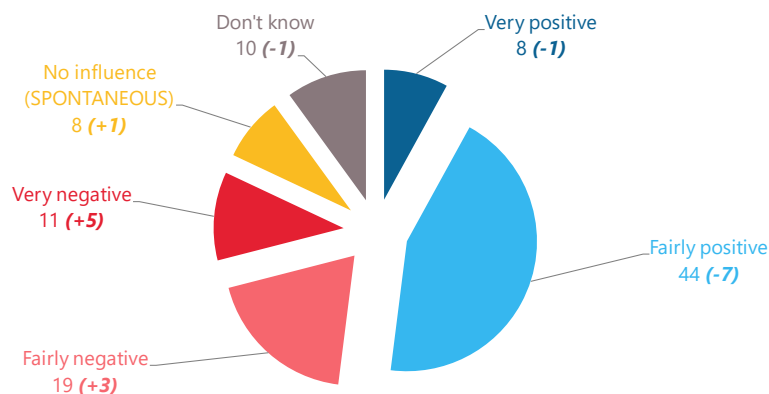
	Economic development	Tourism	Trade	Education
MASHREK	26	26	20	25
Gender				
Male	28	26	20	25
Female	24	27	19	24
Age				
15-24 years	25	24	16	27
25-39 years	25	23	15	26
40-54 years	28	28	23	23
55 years or more	27	34	28	23
Education (End of)				
15-	32	20	11	32
16-19	26	28	22	23
20 or more	25	29	22	25
Still studying	23	25	16	27
Subjective urbanisation				
Rural area or village	23	26	24	22
Small/mid size town	25	29	20	24
Large town	28	25	19	26
Occupation				
Self-employed	25	22	17	30
Managers	25	29	20	20
White collars	25	32	25	16
Manual workers	30	19	12	20
House persons	27	22	16	34
Unemployed	31	18	11	32
Retired	26	38	35	18
Students	24	28	18	26
Difficulties paying bills				
Most of the time	26	24	16	30
From time to time	27	25	20	26
Almost never/ never	28	33	24	22
<b>Relatives living in the EU</b>				
Yes	31	30	22	26
No	25	25	19	25
Opinion of the EU				
Positive	34	29	22	33
Neutral	21	27	20	20
Negative	15	23	17	14
<b>Relations between EU and country</b>				
Good	31	29	20	33
Bad	18	24	22	10
<b>Informed about the EU</b>				
Well-informed	29	31	24	25
Not informed	23	22	16	25

## Perception of the European Union's influence

In both the Maghreb and the Mashrek, the majority of respondents think the European Union has a positive influence on the development of their country, although respondents in the Mashrek are more likely to say this (61% vs 52%)<sup>21</sup>. The proportion who are very positive is similar in both groups of countries (Maghreb: 8%, Mashrek: 11%).

Compared to Autumn 2018, however, the pictures are different. In the Maghreb, the proportion who say the influence has been positive has declined (-8 pp), while in the Mashrek it has increased slightly (+4 pp).

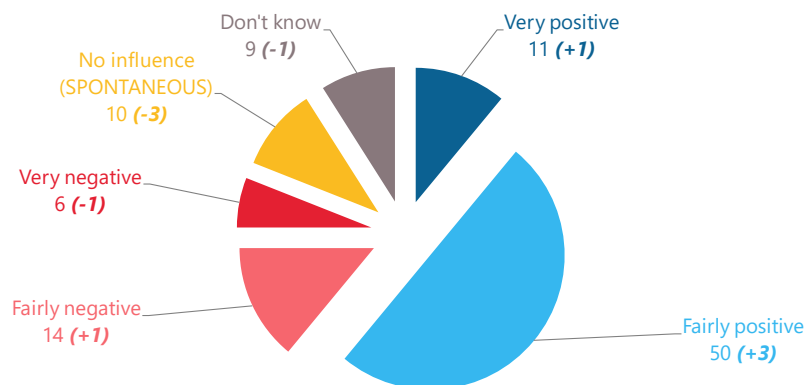
**A12** Do you think that the European Union has a positive or negative influence on the development of (OUR COUNTRY)?  
(% - **MAGHREB**)



(Autumn 2019 - Autumn 2018)

Base: respondents Maghreb (N=3085)

**A12** Do you think that the European Union has a positive or negative influence on the development of (OUR COUNTRY)?  
(% - **MASHREK**)



(Autumn 2019 - Autumn 2018)

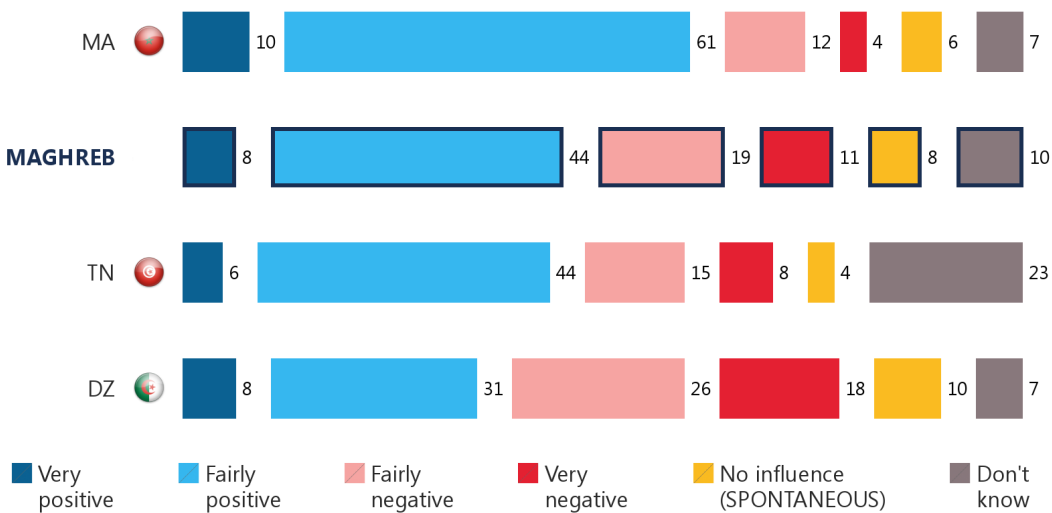
Base: respondents Mashrek (N=4000)

<sup>21</sup> QA12. Do you think that the European Union has a positive or negative influence on the development of (OUR COUNTRY)?

Respondents in Morocco (71%) are much more likely to say the EU's influence is positive than those in Tunisia (50%) or Algeria (39%). Algeria is the only country where respondents are most likely to say the influence is negative (44%).

Compared to Autumn 2018, respondents in Algeria are now much less likely to say the influence is positive (-15 pp) and much more likely to say it is negative (+18 pp).

**A12** Do you think that the European Union has a positive or negative influence on the development of (OUR COUNTRY)? (%)



Base: respondents Maghreb (N=3085)

**A12** Do you think that the European Union has a positive or negative influence on the development of (OUR COUNTRY)? (%)

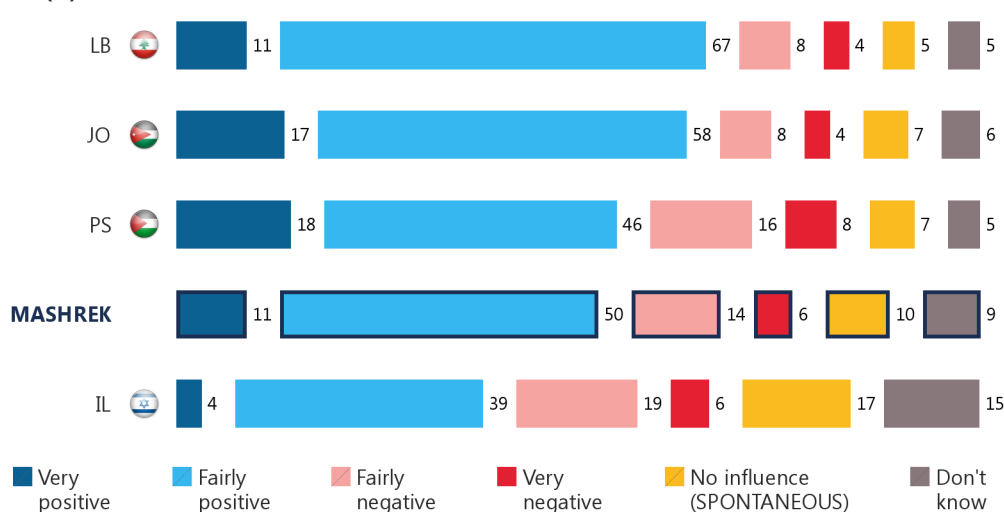
	Total 'Positive'	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	No influence (SPONTANEOUS)	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	52	▼ 8	30	▲ 8	8	▲ 1	10	▼ 1
MA	71	=	16	=	6	▲ 2	7	▼ 2
TN	50	▼ 4	23	▲ 1	4	▼ 8	23	▲ 11
DZ	39	▼ 15	44	▲ 18	10	▲ 3	7	▼ 6

Base: Respondents Maghreb (N=3085)

In the Mashrek, Israel is the only country where less than half say the influence of the EU on their country's development has been positive (43%) – but even so this is still the most common answer. What is interesting to note is that nearly a fifth of respondents in Israel (17%) spontaneously say that the EU has no influence on their country. In contrast, at least three quarters in Lebanon (78%) and Jordan (75%) say the EU's influence is positive.

Compared to Autumn 2018, opinion in Lebanon and Jordan has become more positive, with large increases in the proportion who think the EU's influence is positive and decreases in the proportions who say it is negative. In Palestine there has been a small increase in the proportion who say the influence is negative (+6 pp).

**A12** Do you think that the European Union has a positive or negative influence on the development of (OUR COUNTRY)? (%)



Base: respondents Mashrek (N=4000)

**A12** Do you think that the European Union has a positive or negative influence on the development of (OUR COUNTRY)? (%)

	Total 'Positive'	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	No influence (SPONTANEOUS)	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	61	▲ 4	20	=	10	▼ 3	9	▼ 1
LB	78	▲ 17	12	▼ 10	5	▼ 8	5	▲ 1
JO	75	▲ 10	12	▼ 5	7	▼ 4	6	▼ 1
PS	64	▲ 3	24	▲ 6	7	▼ 6	5	▼ 3
IL	43	▼ 1	25	▲ 2	17	=	15	▼ 1

Base: respondents Mashrek (N=4000)

The socio-demographic analysis reveals the following:

- In the **Maghreb**, respondents younger than 55 are more likely to say the EU's influence has been positive than the oldest respondents: for instance, 57% aged 15-24 say this, compared to 39% aged 55 or older.
- In the **Mashrek**, those who completed education aged 15 or younger are the most likely to say the influence is positive (70% vs 60% who completed education at an older age).
- In the **Maghreb**, respondents living in small/mid-sized towns (38%) are less likely to say the influence is positive than those living in larger towns (55%) or rural villages (53%).
- In the **Maghreb**, housepersons (61%) are more likely to think the influence is positive than those in other occupation groups.

Once again attitudes towards the EU have an impact on opinion. In both the Maghreb and the Mashrek, respondents who have a positive opinion of the EU, who say relations between the EU and their country are good, or who feel well informed about the EU are more likely to see the influence of the EU on the development of their country as positive. For example, in the Mashrek 78% of respondents who feel relations between the EU and their country are good say the EU's influence is positive, compared to 29% who say the relationship is bad.

Finally, in the Mashrek, respondents with relatives living in the EU are more likely to see the influence as positive, compared to those who do not (67% vs 60%).

**A12** Do you think that the European Union has a positive or negative influence on the development of (OUR COUNTRY)?  
(% - MAGHREB)

	Total 'Positive'	Total 'Negative'	Don't know
MAGHREB	52	30	10
Gender			
Male	54	32	8
Female	50	29	12
Age			
15-24 years	57	28	8
25-39 years	55	31	6
40-54 years	52	30	10
55 years or more	39	34	19
Education (End of)			
15-	51	28	13
16-19	50	35	7
20 or more	47	39	7
Still studying	57	30	7
Subjective urbanisation			
Rural area or village	53	30	9
Small/mid size town	38	35	14
Large town	55	30	9
Occupation			
Self-employed	51	33	8
Managers	51	39	4
White collars	49	36	7
Manual workers	55	25	13
House persons	61	17	15
Unemployed	42	38	10
Retired	45	37	10
Students	58	28	7
Relatives living in the EU			
Yes	52	34	7
No	52	27	12
Opinion of the EU			
Positive	71	21	4
Neutral	47	34	9
Negative	26	58	8
Relations between EU and country			
Good	68	23	5
Bad	25	61	5
Informed about the EU			
Well-informed	64	28	3
Not informed	45	33	12

**A12** Do you think that the European Union has a positive or negative influence on the development of (OUR COUNTRY)?  
(% - MASHREK)

	Total 'Positive'	Total 'Negative'	Don't know
MASHREK	61	20	9
Gender			
Male	62	20	7
Female	61	18	11
Age			
15-24	64	18	11
25-39	61	22	8
40-54	62	19	8
55 years	58	18	9
Education (End of)			
15-	70	15	8
16-19	60	19	10
20 or more	60	21	7
Still studying	62	20	11
Subjective urbanisation			
Rural area or village	60	19	11
Small/mid size town	63	20	9
Large town	61	19	8
Occupation			
Self-employed	67	18	4
Managers	58	23	7
White collars	55	21	12
Manual workers	63	21	8
House persons	66	18	8
Unemployed	67	16	7
Retired	55	18	9
Students	63	20	10
Relatives living in the EU			
Yes	67	22	4
No	60	18	10
Opinion of the EU			
Positive	81	10	4
Neutral	52	18	12
Negative	29	52	6
Relations between EU and country			
Good	78	11	4
Bad	29	49	6
Informed about the EU			
Well-informed	68	19	4
Not informed	56	20	12



## Desired role of the EU across policy areas

Respondents were asked whether they thought the EU should have a greater role to play in their country across a range of areas<sup>22</sup>.

Respondents in the **Maghreb** are most likely to mention trade (71%), human rights (68%), migration, economic development, education (all 61%) and transport (57%) as areas the EU should have a greater role to play. In the **Mashrek**, the most mentioned areas for the EU to have a greater role are economic development (70%), trade (68%), human rights (63%), regional cooperation (62%), external policy and foreign affairs and education (61% each).

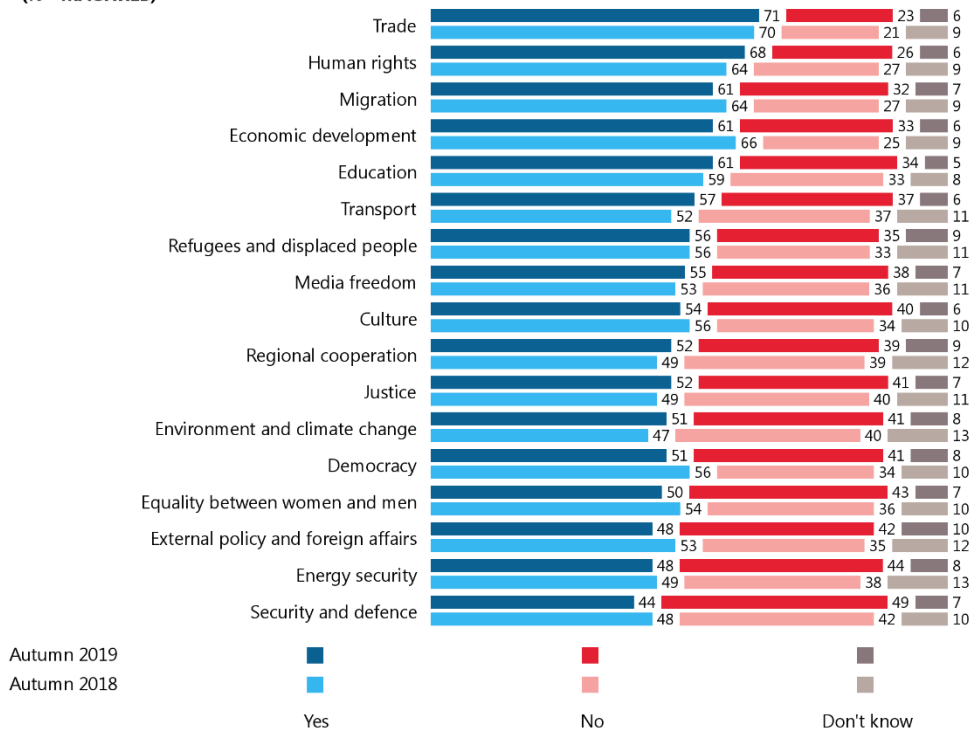
There are several differences between the Maghreb and the Mashrek. Respondents in Maghreb are more likely to mention migration (61% vs 50%) and transport (57% vs 50%) as areas the EU should have a greater role in. Those in the Mashrek, on the other hand, are more likely to mention external policy and foreign affairs (61% vs 48%), energy security (59% vs 48%), regional cooperation (62% vs 52%), economic development (70% vs 61%), equality between women and men (58% vs 50%) and security and defence (51% vs 44%).

Compared to Autumn 2018, respondents in the Maghreb are now more likely to mention transport (+5 pp), but less likely to mention external policy and foreign affairs, democracy, economic development (all -5 pp). In the Mashrek respondents are now less likely to mention each area than they were in Autumn 2018, but the changes are generally small, with the largest decline for transport (-5 pp).

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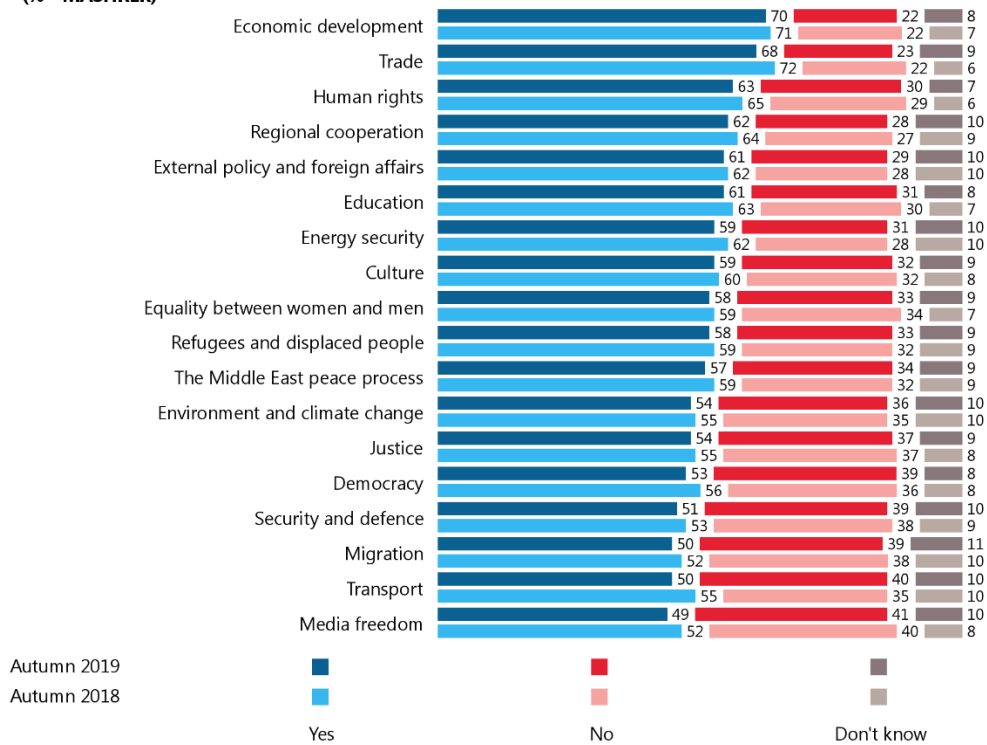
<sup>22</sup> A14. And for each of the following areas, please tell me whether or not you think the European Union should have a greater role to play in (OUR COUNTRY)?

**A14** And for each of the following areas, please tell me whether or not you think the European Union should have a greater role to play in (OUR COUNTRY)?  
 (% - **MAGHREB**)



Base: respondents Maghreb (N=3085)

**A14** And for each of the following areas, please tell me whether or not you think the European Union should have a greater role to play in (OUR COUNTRY)?  
 (% - **MASHREK**)






Base: respondents Mashrek (N=4000)

The country analysis focuses on the two most mentioned areas in each group of countries.

In the Maghreb, respondents in Morocco and Algeria (both 73%) are the most likely to think the EU should have a greater role to play in trade, while respondents in Morocco are the most likely to say the EU should play a greater role within migration (69%). Compared to Autumn 2018, respondents in Morocco are now less likely to think the EU should have a greater role in trade (-9 pp) or migration (-7 pp). Respondents in Algeria and Tunisia, on the other hand, are now more likely to think the EU should have a greater role in trade (+7 pp and +6 pp respectively).




**A14.13** And for each of the following areas, please tell me whether or not you think the European Union should have a greater role to play in (OUR COUNTRY)?

**Trade (%)**

	Yes	Aut. 2019 - Aut. 2018	No	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	71	▲ 1	23	▲ 2	6	▼ 3
DZ 	73	▲ 7	24	▲ 3	3	▼ 10
TN 	62	▲ 6	23	▼ 9	15	▲ 3
MA 	73	▼ 9	23	▲ 7	4	▲ 2

**A14.11** And for each of the following areas, please tell me whether or not you think the European Union should have a greater role to play in (OUR COUNTRY)?

**Migration (%)**

	Yes	Aut. 2019 - Aut. 2018	No	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	61	▼ 3	32	▲ 5	7	▼ 2
TN 	61	▲ 3	24	▼ 7	15	▲ 4
DZ 	56	▼ 2	39	▲ 10	5	▼ 8
MA 	69	▼ 7	26	▲ 5	5	▲ 2





Base: Respondents Maghreb (N=3085)

In the **Mashrek**, there is relatively little difference between countries in the proportion who think the EU should be more involved in economic development in their country. Proportions range from 72% in Israel and Lebanon to 66% in Jordan. In terms of trade, those in Israel (75%) are much more likely to think the EU should have a greater role than respondents in the other countries.

Compared to Autumn 2017, respondents in Palestine are now more likely to say the EU should be more involved in economic development (+7 pp). Respondents in Jordan and Lebanon, on the other hand, are now less likely to think the EU should be more involved in either area, with the largest declines seen for trade (-14pp and -12pp respectively)





**A14.1** And for each of the following areas, please tell me whether or not you think the European Union should have a greater role to play in (OUR COUNTRY)?

**Economic development (%)**

	Yes	Aut 2019 - Aut. 2018	No	Aut 2019 - Aut. 2018	Don't know	Aut 2019 - Aut. 2018
MASHREK	70	▼ 1	22	=	8	▲ 1
PS 	68	▲ 7	29	▲ 2	3	▼ 9
IL 	72	▲ 1	17	▼ 2	11	▲ 1
LB 	72	▼ 6	23	▲ 3	5	▲ 3
JO 	66	▼ 7	27	▲ 2	7	▲ 5

**A14.13** And for each of the following areas, please tell me whether or not you think the European Union should have a greater role to play in (OUR COUNTRY)?

**Trade (%)**

	Yes	Aut 2019 - Aut. 2018	No	Aut 2019 - Aut. 2018	Don't know	Aut 2019 - Aut. 2018
MASHREK	68	▼ 4	23	▲ 1	9	▲ 3
PS 	61	▲ 2	34	▲ 4	5	▼ 6
IL 	75	▼ 1	15	▼ 1	10	▲ 2
LB 	63	▼ 12	27	▲ 4	10	▲ 8
JO 	64	▼ 14	27	▲ 6	9	▲ 8

*Base: Respondents Mashrek (N=4000)*

The socio-demographic analysis also focusses on the two most mentioned areas in each group of countries.

**Maghreb**

- Men are more likely than women to say the EU should have a greater role in trade (74% vs 68%) and migration (64% vs 58%).
- Those aged 15-39 are the most likely to agree for each area.
- Respondents who completed education aged 16 or older are the most likely to agree the EU should have a greater role in each area.
- Managers are the most likely to agree for both economic development (78%) and migration (67%).
- Respondents living in rural villages or large towns are most likely to agree the EU should have a greater role in each area, compared to those in small/mid-sized towns.

In addition, respondents who have relatives living in the EU, have a good opinion of the EU, say relations between the EU and their country are good, or who feel well informed about the EU are more likely to think the EU should have a greater role in each of these areas. For example, 79% of those who think their country has a good relationship with the







EU think it should have a greater role in trade, compared to 62% who think the relationship is poor.

### **Mashrek**

- Respondents aged 55 and older are the most likely to agree the EU should have more involvement with economic development (75%) and trade (77%).
- Retired persons are the most likely to agree the EU should have a greater role to play when it comes to trade (78%).







Respondents who have a good opinion of the EU, say relations between the EU and their country are good, or who feel well informed about the EU are more likely to think the EU should have a greater role in these areas. For example, 75% of respondents who feel well-informed about the EU say it should be more involved in economic development, compared to 66% who do not feel well informed.

**A14** And for each of the following areas, please tell me whether or not you think the European Union should have a greater role to play in (OUR COUNTRY)?  
(% - **MAGHREB**)

	Trade		Migration	
	Yes	No	Yes	No
MAGHREB	71	23	61	32
 <b>Gender</b>				
Male	74	22	64	31
Female	68	25	58	33
 <b>Age</b>				
15-24 years	75	22	63	32
25-39 years	74	22	65	31
40-54 years	68	26	61	33
55 years or more	63	24	53	33
 <b>Education (End of)</b>				
15-	66	24	57	31
16-19	75	22	65	32
20 or more	71	26	63	35
Still studying	76	21	64	32
 <b>Subjective urbanisation</b>				
Rural area or village	71	24	61	32
Small/mid size town	64	26	52	37
Large town	73	22	64	31
 <b>Occupation</b>				
Self-employed	75	20	62	32
Managers	78	21	67	32
White collars	72	25	60	37
Manual workers	66	25	60	30
House persons	71	21	66	24
Unemployed	67	27	56	38
Retired	69	25	61	32
Students	76	21	63	32
<b>Relatives living in the EU</b>				
Yes	76	21	64	32
No	66	26	59	32
 <b>Opinion of the EU</b>				
Positive	80	18	71	27
Neutral	69	27	57	36
Negative	63	33	51	44
<b>Relations between EU and country</b>				
Good	79	19	67	30
Bad	62	33	56	39
<b>Informed about the EU</b>				
Well-informed	78	21	67	31
Not informed	68	25	58	34

**A14** And for each of the following areas, please tell me whether or not you think the European Union should have a greater role to play in (OUR COUNTRY)?

**MASHREK**

	Economic development		Trade	
	Yes	No	Yes	No
MASHREK	70	22	68	23
 <b>Gender</b>				
Male	70	23	68	24
Female	70	22	68	22
 <b>Age</b>				
15-24 years	69	21	63	25
25-39 years	68	25	65	26
40-54 years	69	24	70	23
55 years or more	75	19	77	17
 <b>Education (End of)</b>				
15-	68	26	62	29
16-19	70	21	70	21
20 or more	73	21	71	23
Still studying	68	23	63	24
 <b>Subjective urbanisation</b>				
Rural area or village	69	22	69	20
Small/mid size town	68	24	66	24
Large town	72	22	69	24
 <b>Occupation</b>				
Self-employed	69	26	65	28
Managers	74	18	70	24
White collars	71	21	73	18
Manual workers	68	26	66	27
House persons	67	26	63	28
Unemployed	67	24	62	26
Retired	75	17	78	15
Students	70	21	64	24
<b>Relatives living in the EU</b>				
Yes	72	23	68	26
No	70	22	68	23
 <b>Opinion of the EU</b>				
Positive	78	19	73	22
Neutral	69	22	69	21
Negative	58	36	62	33
<b>Relations between EU and country</b>				
Good	76	20	72	22
Bad	64	30	65	29
<b>Informed about the EU</b>				
Well-informed	75	21	71	24
Not informed	66	25	65	24

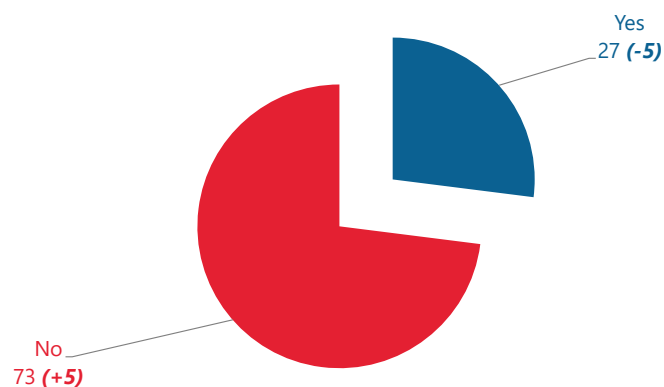
## 7. Awareness of and involvement in EU funded projects

### Knowledge of EU-funded programmes

Respondents who are aware the EU provides their country with specific support were asked if they knew of any EU-funded programmes in their country<sup>23</sup>. Awareness is much higher in the Mashrek: 54% are aware of such programmes in their country, compared to 27% in the Maghreb. A similar disparity was observed in summer 2018.

There has been little change in awareness in the Mashrek since summer 2018, while awareness has dropped five points in the Maghreb.

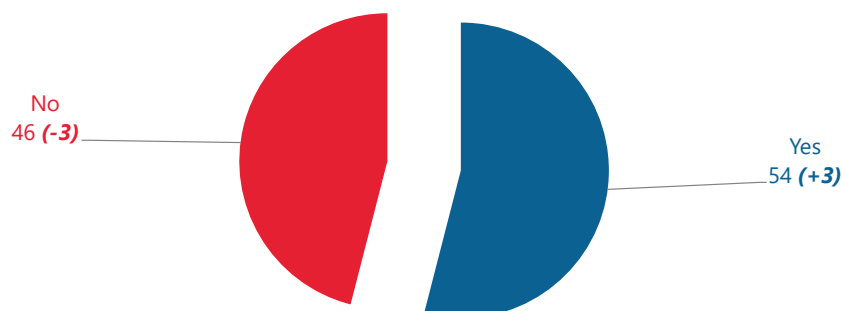
**A7** Do you know of any programmes financed by the European Union in (OUR COUNTRY)?  
(% - **MAGHREB**)



(Autumn 2019 - Autumn 2018)

Base: respondents aware of the EU's financial support in Maghreb (N=795)

**A7** Do you know of any programmes financed by the European Union in (OUR COUNTRY)?  
(% - **MASHREK**)



(Autumn 2019 - Autumn 2018)

Base: respondents aware of the EU's financial support in Mashrek (N=1846)

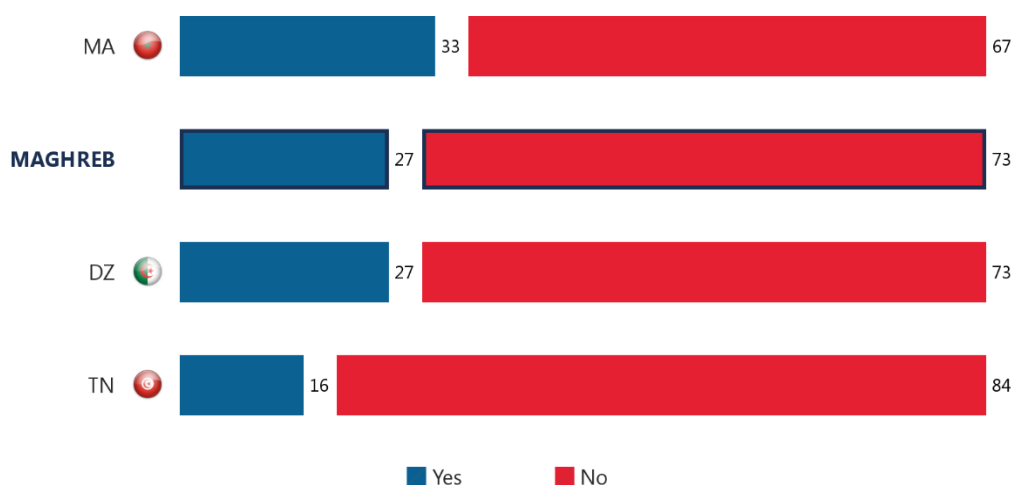
<sup>23</sup> A7. Do you know of any programmes financed by the European Union in (OUR COUNTRY)?



Respondents in Morocco (33%) are the most likely to be aware of specific programmes financed by the EU in their country, particularly compared to those in Tunisia (16%).

Awareness has declined in all three countries in the Maghreb since Autumn 2018, with the largest declines seen in Algeria (-7 pp) and Tunisia (-6 pp). The longer-term trend shows awareness in Algeria has been steadily declining since Spring 2017. In Tunisia awareness had been steadily increasing up to Autumn 2018. In Morocco awareness remains considerably higher than in Spring 2016, but significantly lower than Spring 2017.

**A7** Do you know of any programmes financed by the European Union in (OUR COUNTRY)?  
(%)



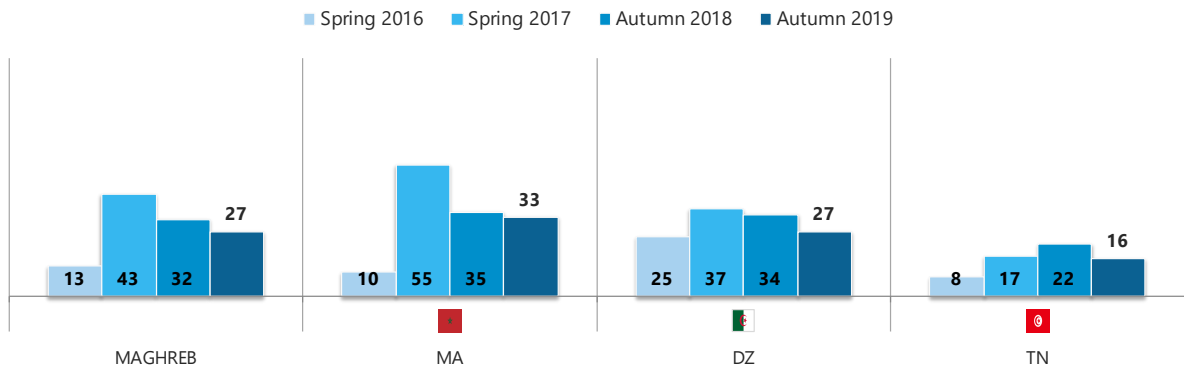
Base: respondents aware of the EU's financial support in Maghreb (N=795)

**A7** Do you know of any programmes financed by the European Union in (OUR COUNTRY)?  
(%)

	Yes	Aut. 2019 - Aut. 2018	No	Aut. 2019 - Aut. 2018
MAGHREB	27	▼ 5	73	▲ 5
MA	33	▼ 2	67	▲ 2
TN	16	▼ 6	84	▲ 6
DZ	27	▼ 7	73	▲ 7

Base: respondents aware of the EU's financial support in Maghreb (N=795)

**A7** Do you know of any specific programmes financed by the European Union in (OUR COUNTRY)?  
 (% - YES)

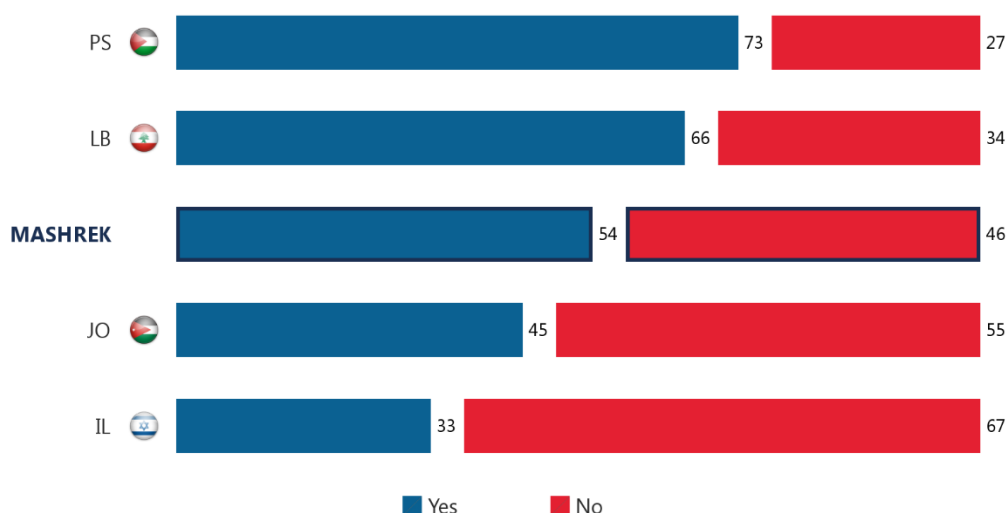


*Base: respondents aware of the EU's financial support in Maghreb (N=795)*

Awareness of programmes financed by the EU varies considerably in the countries of the Mashrek: from 73% in Palestine to 33% in Israel.

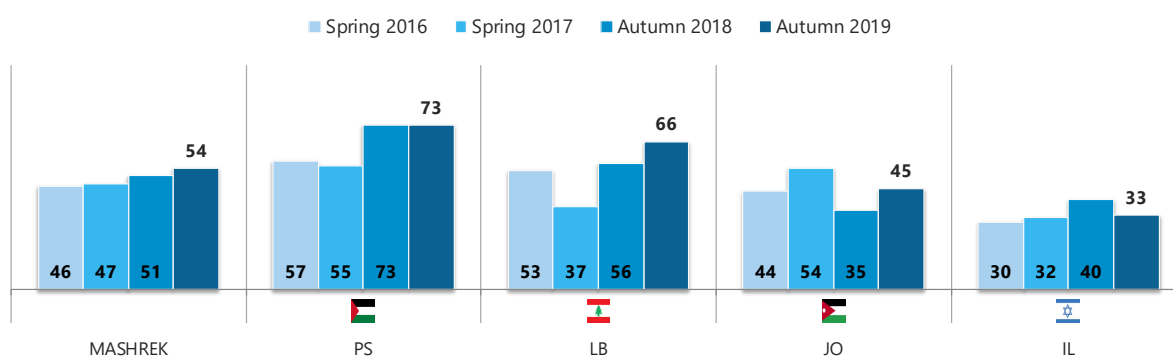
Compared to Autumn 2018, awareness has increased in Lebanon and Jordan (each +10 pp), declined in Israel (-7 pp) and remained stable in Palestine. Awareness in Lebanon is now at its highest ever point since Spring 2016. Awareness in Jordan is slightly higher than in Spring 2016, but lower than in Spring 2017. Awareness in Palestine remains higher than Spring 2016 or 2017, while in Israel it has dropped back to a similar level as in 2016 and 2017, after the high point in Autumn 2018.

**A7** Do you know of any programmes financed by the European Union in (OUR COUNTRY)? (%)



Base: respondents aware of the EU's financial support in Mashrek (N=1846)

**A7** Do you know of any specific programmes financed by the European Union in (OUR COUNTRY)? (% - YES)



Base: respondents aware of the EU's financial support in Mashrek (N=1846)

The socio-demographic analysis shows:







- In both the **Maghreb** and the **Mashrek**, men are more likely to know of programmes financed by the EU than women. For example, in the Maghreb 31% of men know of programmes, compared to 23% of women.

- In the **Maghreb**, respondents who completed education aged 20 or older (35%) are the most likely to know of programmes, while in the **Mashrek** it is respondents who completed education when they were aged 15 or younger or when they were 20 and older who are more likely to know about specific programmes funded by the European Union (both 59%).
- In the **Maghreb**, those living in small/mid-sized villages are the least likely to be aware of programmes.
- In the **Maghreb** the self-employed, managers (both 31%) and other white-collar workers (30%) are the most likely to be aware of programmes while in the **Mashrek** it is the self-employed who have the highest awareness (64%) of EU financed programmes.







As has been the case for previous questions, attitudes and experience are influential. In both the Maghreb and the Mashrek, those with relatives living in the EU, who say relations between the EU and their country are good, and who feel well-informed about the EU are the most likely to be aware of programmes. For example, 31% of respondents in the Maghreb with relatives living in the EU say they know of programmes, compared to 22% who do not have relatives living in the EU.

Finally, respondents in the Mashrek who have a positive attitude towards the EU are more likely to be aware of programmes (61%) than those who are neutral (43%) or negative (40%). This pattern does not occur in the Maghreb.

**A7** Do you know of any programmes financed by the European Union in (OUR COUNTRY)?  
(% - **MAGHREB**)

	Yes	No
MAGHREB	27	73
 Gender		
Male	31	69
Female	23	77
 Age		
15-24 years	27	73
25-39 years	26	74
40-54 years	29	71
55 years or more	28	72
 Education (End of)		
15-	24	76
16-19	24	76
20 or more	35	65
Still studying	26	74
 Subjective urbanisation		
Rural area or village	29	71
Small/mid size town	15	85
Large town	29	71
 Occupation		
Self-employed	31	69
Managers	31	69
White collars	30	70
Manual workers	25	75
House persons	24	76
Unemployed	25	75
Retired	25	75
Students	29	71
<b>Relatives living in the EU</b>		
Yes	31	69
No	22	78
 Opinion of the EU		
Positive	28	72
Neutral	27	73
Negative	28	72
<b>Relations between EU and country</b>		
Good	28	72
Bad	21	79
<b>Informed about the EU</b>		
Well-informed	32	68
Not informed	20	80

**A7** Do you know of any programmes financed by the European Union in (OUR COUNTRY)?  
(% - **MASHREK**)

	Yes	No
MASHREK	54	46
 Gender		
Male	57	43
Female	51	49
 Age		
15-24 years	51	49
25-39 years	56	44
40-54 years	54	46
55 years or more	56	44
 Education (End of)		
15-	59	41
16-19	53	47
20 or more	59	41
Still studying	49	51
 Subjective urbanisation		
Rural area or village	55	45
Small/mid size town	52	48
Large town	56	44
 Occupation		
Self-employed	64	36
Managers	57	43
White collars	50	50
Manual workers	48	52
House persons	55	45
Unemployed	58	42
Retired	56	44
Students	47	53
<b>Relatives living in the EU</b>		
Yes	59	41
No	52	48
 Opinion of the EU		
Positive	61	39
Neutral	43	57
Negative	40	60
<b>Relations between EU and country</b>		
Good	56	44
Bad	51	49
<b>Informed about the EU</b>		
Well-informed	60	40
Not informed	47	53

## Type of EU-funded programmes respondents know of

Respondents who knew of programmes financed by the EU in their country were asked which type of programmes they knew about<sup>24</sup>.

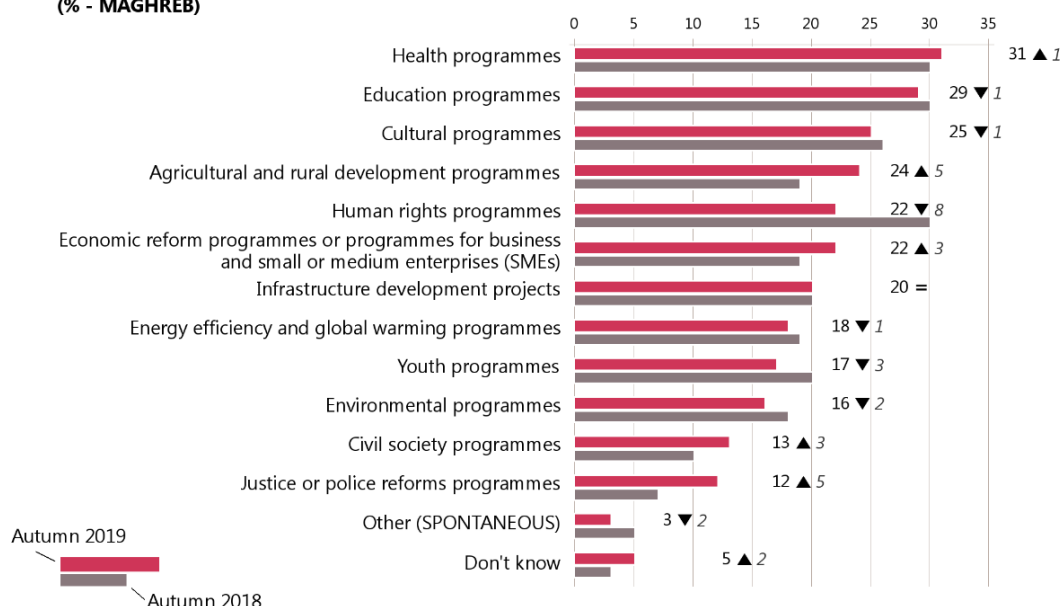
In the Maghreb, the most mentioned programme areas are health programmes (31%), education programmes (29%), cultural programmes (25%), agricultural and rural development programmes (24%), human rights programmes and economic reform programmes or programmes for business and small or medium enterprises (SMEs) (22% each).

In the Mashrek, the most mentioned programme areas are education programmes (53%), infrastructure development projects (41%), health programmes (40%), cultural programmes (32%) and human rights programmes (28%).

In 9 out of the 14 programme areas respondents in the Mashrek are more likely to know of programmes than those in the Maghreb. The largest differences are for education (Maghreb: 29%, Mashrek: 53%) and infrastructure development (Maghreb: 20%, Mashrek: 41%).

There have been some notable changes since Autumn 2018. In the Maghreb respondents are now less likely to say they know human rights programmes (-8 pp), but more likely to mention agricultural and rural development programmes or justice or police reforms programmes (both +5 pp). In the Mashrek respondents are now less likely to mention programmes in most of these areas, and in particular civil society programmes (-9 pp), agricultural and rural development programmes or cultural programmes (each -8 pp) or economic reform programmes or programmes for SMEs (-7 pp).

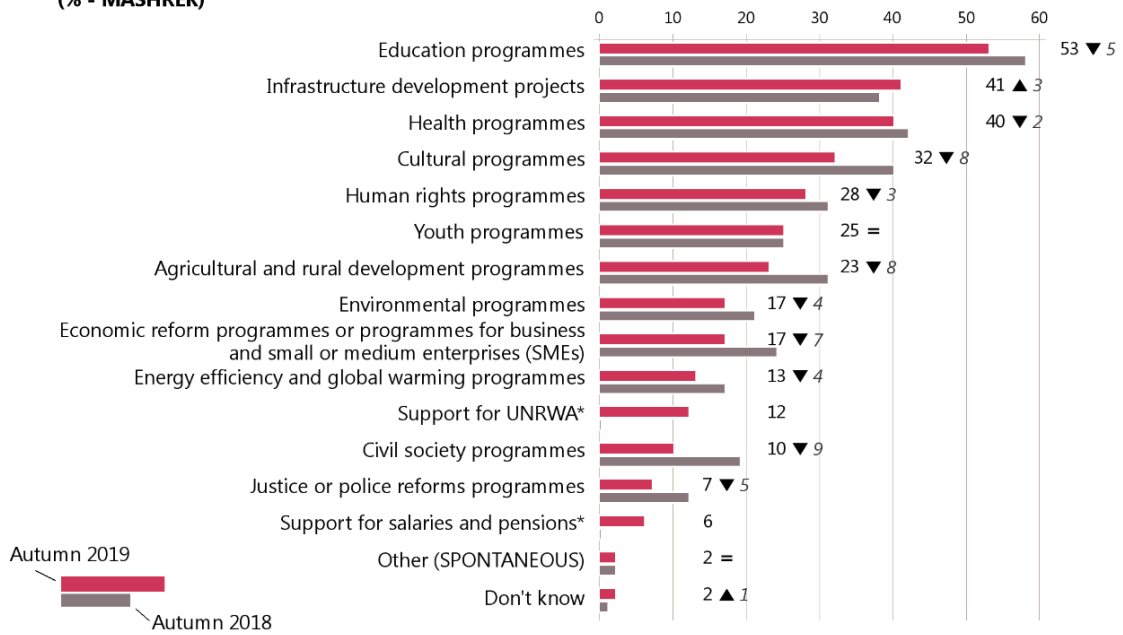
**A8** Which programme(s) do you know? (MULTIPLE ANSWERS POSSIBLE)  
(% - MAGHREB)



Base: respondents that are aware of programmes in Maghreb (N=216)

<sup>24</sup> A8. Which programme(s) do you know?

**A8** Which programme(s) do you know? (MULTIPLE ANSWERS POSSIBLE)  
 (% - MASHREK)





Base: respondents that are aware of programmes in Mashrek (N=1001)




In the Maghreb, respondents in Tunisia are the most likely to say they have heard of infrastructure development projects (34%), while those in Morocco are the most likely to say they have heard of health (40%), agricultural and rural development (27%) or economic reform programmes (23%)<sup>25</sup>. Respondents in Algeria are the most likely to have heard of a number of programmes, including education programmes (31%), cultural programmes (33%), and human rights programmes (31%).

Compared to Autumn 2018, respondents in Tunisia are generally less likely to have heard of most programmes, in particular cultural (-24 pp) and human rights programmes (-20 pp). The largest changes in Morocco are a decline in the awareness of human rights programmes (-8 pp) but an increase in the awareness of youth or cultural programmes (+6 pp each).

**A8** Which programme(s) do you know? (MULTIPLE ANSWERS POSSIBLE)  
(%)

	Health programmes	Aut. 2019 - Aut. 2018	Education programmes	Aut. 2019 - Aut. 2018	Cultural programmes	Aut. 2019 - Aut. 2018	Agricultural and rural development programmes	Aut. 2019 - Aut. 2018	Human rights programmes	Aut. 2019 - Aut. 2018	Economic reform programmes or programmes for business and small or medium enterprises (SMEs)	Aut. 2019 - Aut. 2018
MAGHREB	31	▲ 1	29	▼ 1	25	▼ 1	24	▲ 5	22	▼ 8	22	▲ 3
MA 	40	▼ 2	30	▲ 1	21	▲ 6	27	▲ 4	20	▼ 8	23	▲ 8
DZ 	23	▲ 6	31	▲ 2	33	▲ 2	21	▲ 7	31	=	23	▲ 1
TN 	9	▼ 13	24	▼ 13	27	▼ 24	19	▲ 1	15	▼ 20	16	▼ 8

**A8** Which programme(s) do you know? (MULTIPLE ANSWERS POSSIBLE)  
(%)

	Infrastructure development projects	Aut. 2019 - Aut. 2018	Energy efficiency and global warming programmes	Aut. 2019 - Aut. 2018	Youth programmes	Aut. 2019 - Aut. 2018	Environmental programmes	Aut. 2019 - Aut. 2018	Civil society programmes	Aut. 2019 - Aut. 2018	Justice or police reforms programmes	Aut. 2019 - Aut. 2018
MAGHREB	20	=	18	▼ 1	17	▼ 3	16	▼ 2	13	▲ 3	12	▲ 5
MA 	20	=	19	▼ 2	14	▲ 6	11	▼ 5	11	▲ 5	9	=
DZ 	13	▼ 2	21	▲ 7	21	▼ 9	29	▲ 10	17	▲ 5	17	▲ 14
TN 	34	▲ 6	6	▼ 16	19	▼ 17	12	▼ 9	10	▼ 5	13	▲ 4

<sup>25</sup> Algeria is not included in the discussion of results due to very low sample size (48). Care should be taken interpreting the results for Tunisia, due to low sample size (68).



*Base: respondents that are aware of programmes in Maghreb (N=216)*

In the Mashrek, respondents in Jordan (68%) and Israel (41%) are most likely to have heard of education programmes, while those in Lebanon (53%) and Palestine (45%) most often mention infrastructure and development projects<sup>26</sup>. In general, however, there are no consistent patterns in the country results.




Compared to Autumn 2018, there are three areas that respondents in each country in the Mashrek are now less likely to mention education, economic reform and civil society programmes. The largest decline seen in Lebanon is in mentions of education programmes (-18 pp). Other notable changes include a 26 percentage point declines in mentions of environmental programmes (-26 pp) or energy efficiency and global warming programmes (-17 pp) in Israel, a 14-point decline in mentions of cultural programmes in Palestine, an 11-point decline in mentions of justice and police reform programmes as well as cultural programmes in Lebanon, and a 12-point decline in the mention of agricultural programmes as well as an 11-point decline in mentions of environmental programmes in Jordan.

**A8** Which programme(s) do you know? (MULTIPLE ANSWERS POSSIBLE)  
(%)

	Education programmes	Aut. 2019 - Aut. 2018	Infrastructure development projects	Aut. 2019 - Aut. 2018	Health programmes	Aut. 2019 - Aut. 2018	Cultural programmes	Aut. 2019 - Aut. 2018	Human rights programmes	Aut. 2019 - Aut. 2018	Youth programmes	Aut. 2019 - Aut. 2018	Agricultural and rural development programmes	Aut. 2019 - Aut. 2018
MASHREK	53	▼ 5	41	▲ 3	40	▼ 2	32	▼ 8	28	▼ 3	25	=	23	▼ 8
IL 	41	▼ 6	24	▲ 1	21	▼ 9	36	=	40	▼ 6	26	▲ 4	10	▼ 11
JO 	68	▼ 1	31	=	45	▲ 8	29	▼ 1	27	▼ 9	26	▼ 3	9	▼ 12
LB 	50	▼ 18	53	▲ 6	38	=	41	▼ 11	29	=	24	▲ 3	44	▲ 1
PS 	44	▼ 7	45	▲ 2	42	▼ 7	27	▼ 14	25	▲ 1	25	=	24	▼ 10

<sup>26</sup> Care should be taken interpreting the results for Israel, due to low sample size (62).

**A8** Which programme(s) do you know? (MULTIPLE ANSWERS POSSIBLE)  
(%)

	Environmental programmes	Aut. 2019 - Aut. 2018	Economic reform programmes or programmes for business and small or medium enterprises (SMEs)	Aut. 2019 - Aut. 2018	Energy efficiency and global warming programmes	Aut. 2019 - Aut. 2018	Support for UNRWA	Aut. 2019 - Aut. 2018	Civil society programmes	Aut. 2019 - Aut. 2018	Justice or police reforms programmes	Aut. 2019 - Aut. 2018	Support for salaries and pensions	Aut. 2019 - Aut. 2018
MASHREK	17	▼ 4	17	▼ 7	13	▼ 4	12	N.A.	10	▼ 9	7	▼ 5	6	N.A.
IL 	21	▼ 26	6	▼ 3	29	▼ 17	-	N.A.	10	▼ 9	11	▲ 6	-	N.A.
JO 	8	▼ 11	13	▼ 5	7	▼ 5	-	N.A.	6	▼ 4	2	▼ 1	-	N.A.
LB 	32	▲ 2	22	▼ 9	14	▼ 4	-	N.A.	17	▼ 5	13	▼ 11	-	N.A.
PS 	12	=	20	▼ 9	12	▲ 1	41	N.A.	7	▼ 17	7	▼ 7	19	N.A.

*Base: respondents that are aware of programmes in Mashrek (N=1001)*

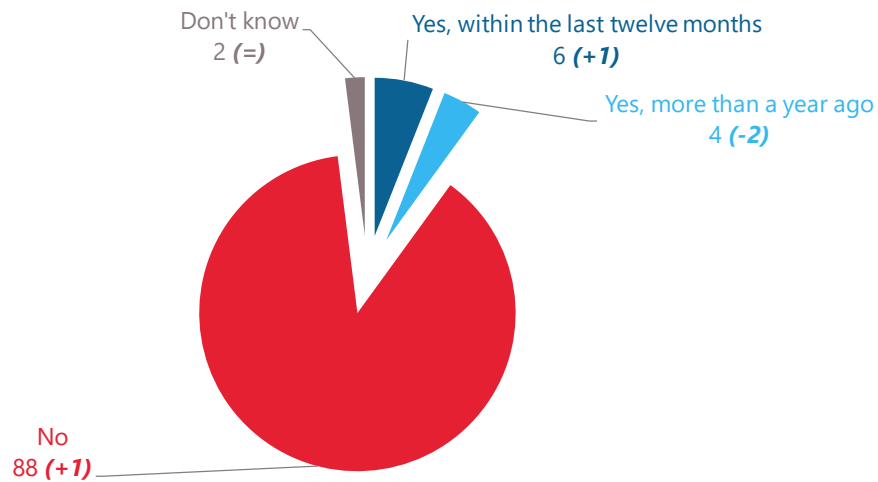
Due to low sample size it was not possible to conduct a socio-demographic analysis on this question.

## Personal involvement with EU-funded projects

Amongst respondents who know about programmes financed by the EU in their country, 10% in the Maghreb and 19% in the Mashrek have been personally involved with an EU-funded project. However, the large majority have not been personally involved.

There has been little change (1-2 pp) since Autumn 2018.

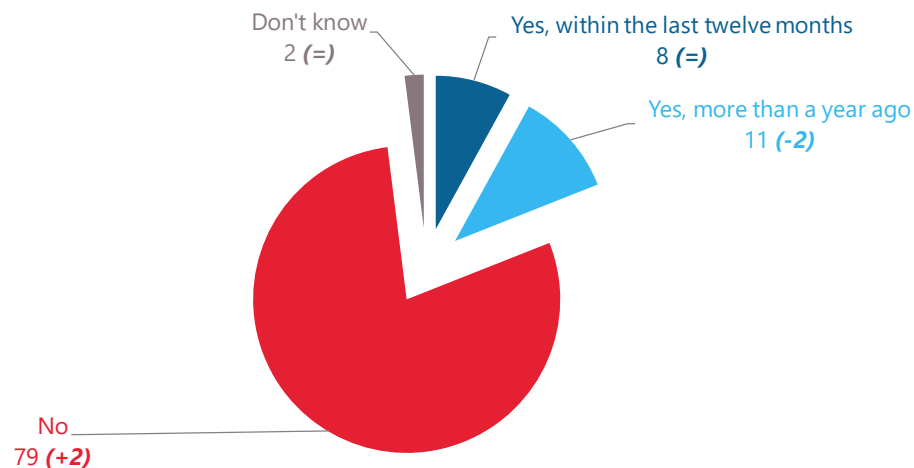
- A9** Have you ever been personally involved with an EU-funded project?  
(% - **MAGHREB**)



(Autumn 2019 - Autumn 2018)

Base: respondents that are aware of programmes in Maghreb (N=216)

- A9** Have you ever been personally involved with an EU-funded project?  
(% - **MASHREK**)

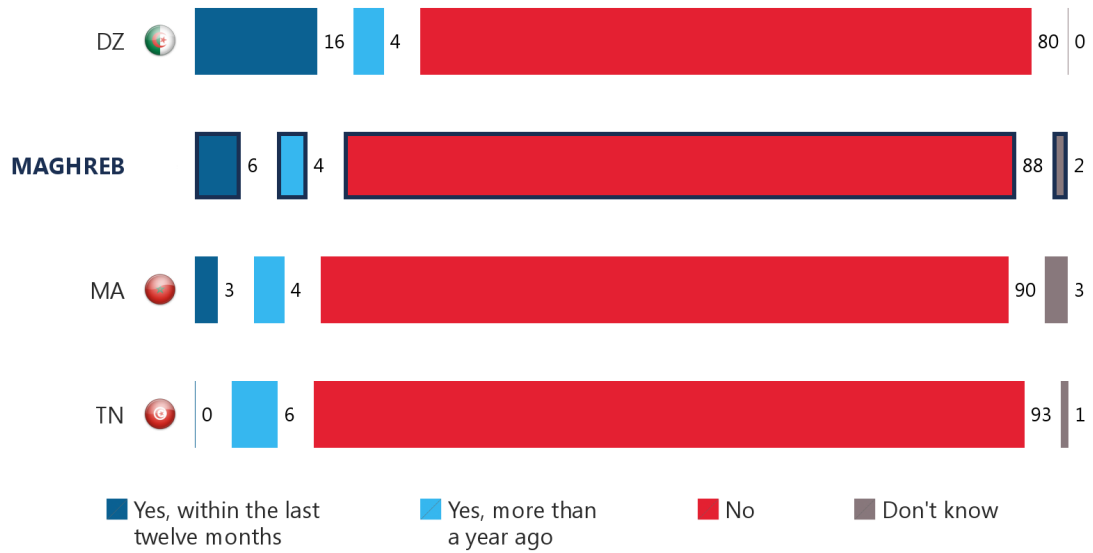


(Autumn 2019 - Autumn 2018)

Base: respondents that are aware of programmes in Mashrek (N=1001)

Just over one in twenty in Morocco (7%) and Tunisia (6%) have been personally involved with an EU-funded project<sup>27</sup>.

**A9** Have you ever been personally involved with an EU-funded project?  
(%)

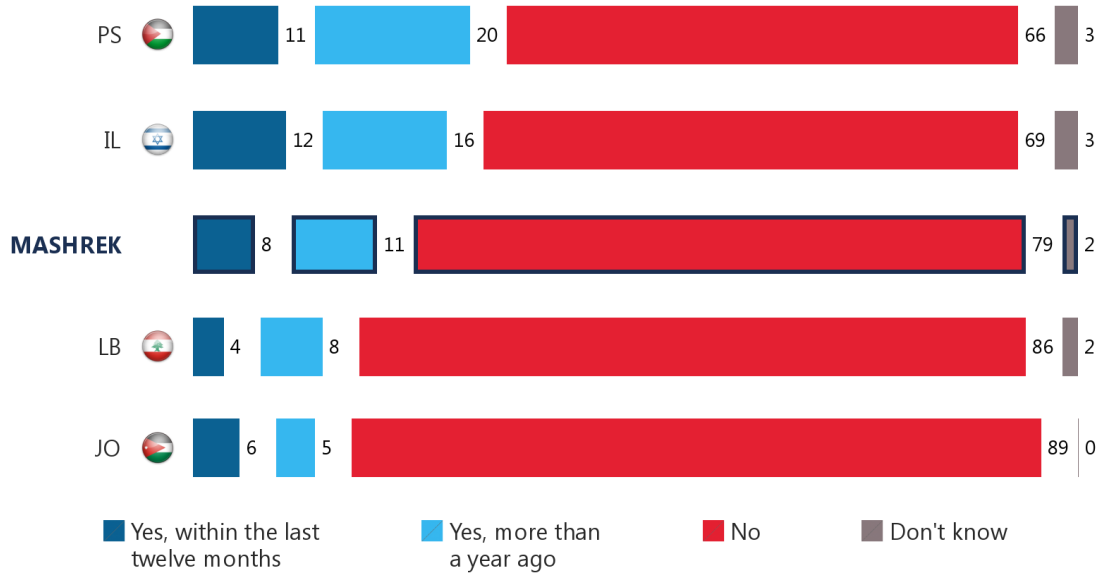


*Base: respondents that are aware of programmes in Maghreb (N=216)*

<sup>27</sup> Algeria is not included in the discussion of results due to very low sample size (48). Care should be taken interpreting the results for Tunisia, due to low sample size (68).

Respondents in Palestine (31%) and Israel (28%) are much more likely to have been personally involved with an EU-funded project than those in Lebanon (12%) or Jordan (11%)<sup>28</sup>.

**A9** Have you ever been personally involved with an EU-funded project? (%)



*Base: respondents that are aware of programmes in Mashrek (N=1001)*

Due to low sample size it was not possible to conduct a socio-demographic analysis.

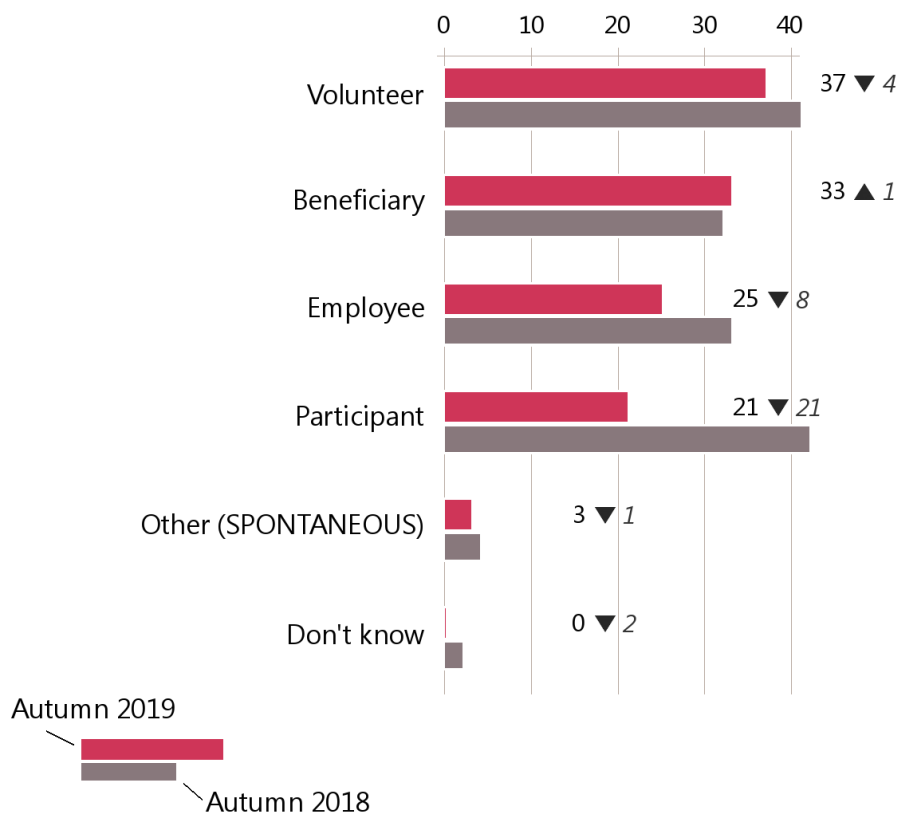
<sup>28</sup> Care should be taken interpreting the results for Israel, due to low sample size (62).

## Forms of involvement

Respondents in the Mashrek who have been personally involved in an EU-funded programme are most likely to have been a volunteer (37%) or a beneficiary (33%)<sup>29</sup>. It was not possible to conduct the analysis in the Maghreb due to a very low sample size (23).

Compared to Autumn 2018 respondents in the Mashrek respondents are now much less likely to say they were a participant (-21 pp) or an employee (-8 pp).

**A10** What form did this involvement take?  
(MULTIPLE ANSWERS POSSIBLE)  
(% - MASHREK)



*Base: respondents who were involved with an EU-funded project in Mashrek (N=191)*

No country or socio-demographic analysis were possible, due to very low sample sizes.

<sup>29</sup> A10. What form did this involvement take?

## II. INFORMATION ON THE EUROPEAN UNION

This section considers respondents' media habits, as well as their information seeking behaviour when it comes to the EU. It begins with a discussion of where respondents get most of their news on national political matters, the sources they trust for such news, and the perceived influence of national media on public opinion. The section continues with a review of information-seeking behaviour about the EU, including how often respondents look for information on the EU and the kind of information they look for. Finally, the use of EU web and social media sites, and respondents' opinions about the coverage of the EU in the local media are discussed.

### 1. Media habits

#### **Most popular news sources**

Respondents were asked where they got most of their news on national political matters<sup>30</sup>. In the Maghreb, there are four sources mentioned by at least one in five respondents: private TV channels (45%), public TV channels (39%), online social networks (36%) and the Internet (30%). In the Mashrek, the four most mentioned media types are online social networks (50%), the Internet (49%), private TV channels (45%) and public TV channels (43%).

With the exception of private TV channels, respondents in the Maghreb are less likely to mention any media source than respondents in the Mashrek, with the largest differences for the Internet (30% vs 49% in the Mashrek) and online social networks (36% vs 50%). Respondents in the Maghreb are, on the other hand, more likely than those in the Mashrek to say they do not look for news on national political matters (14% vs 6%).

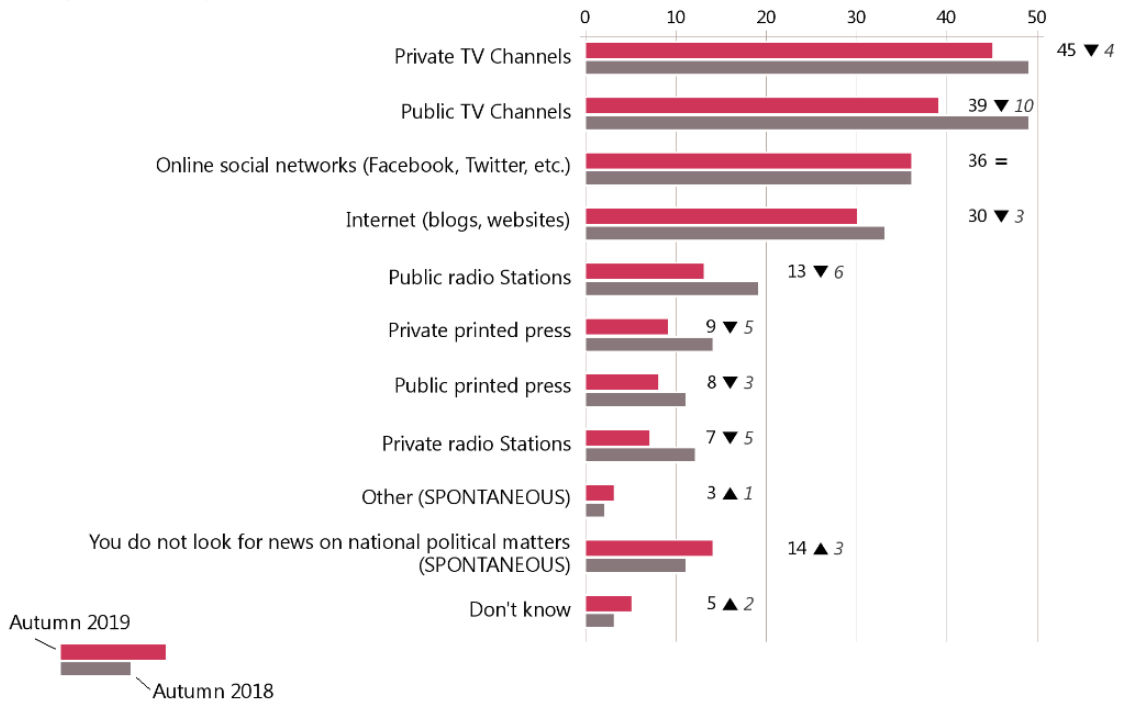
Respondents in the Maghreb are now less likely to mention most of these sources than they were in Autumn 2018, particularly public TV channels (-10 pp), public radio stations (-6 pp), private radio stations and the private printed press (-5 pp each). In the Mashrek, on the other hand, the only notable change is a seven-point increase in the proportion who mention public TV channels.

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<sup>30</sup> B1T. Where do you get most of your news on national political matters?

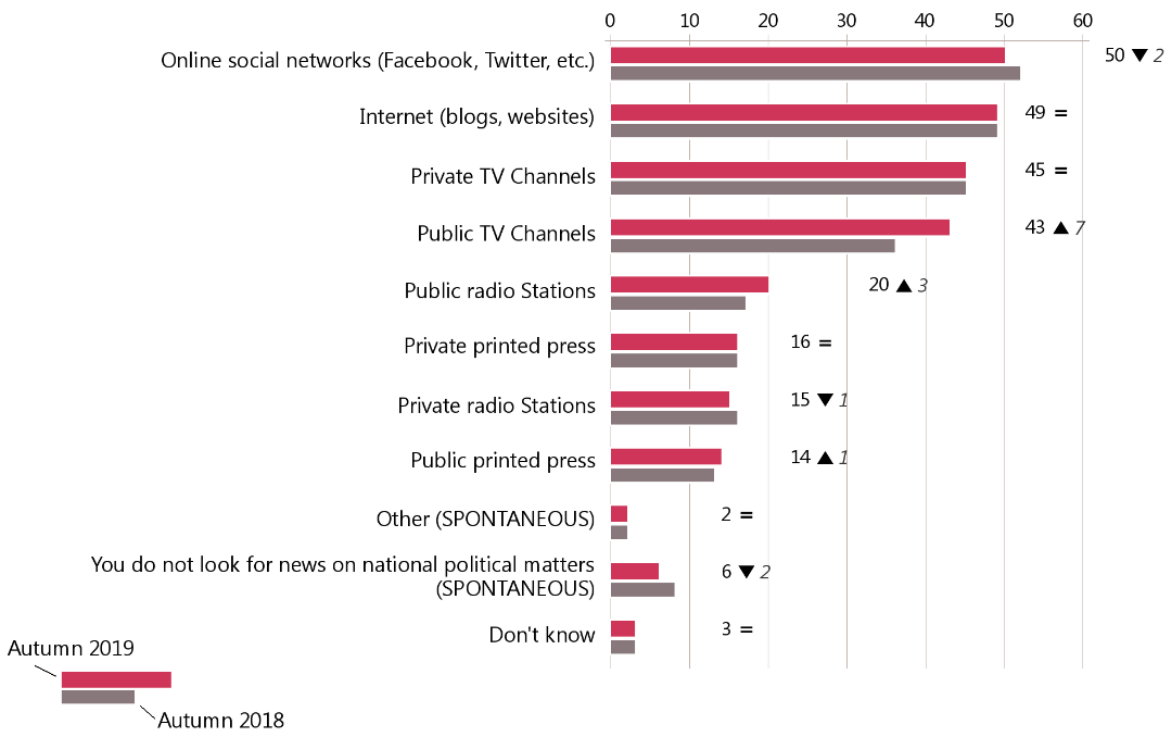


**B1T** Where do you get most of your news on national political matters? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
 (% - **MAGHREB**)



Base: respondents Maghreb (N=3085)

**B1T** Where do you get most of your news on national political matters? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
 (% - **MASHREK**)






Base: respondents in Mashrek (N=4000)

Private TV channels are the most mentioned source of news for respondents in Algeria (54%), while in Morocco and Tunisia public TV channels are most mentioned (44% and 40% respectively). Algeria is the only country where online social networks are one of the top two sources – in the other countries the top two are TV channels. As was the case in 2018, respondents in Algeria are more likely to mention online sources than those in other countries.

In all three countries, respondents are now less likely to mention public or private TV channels, the internet, public or private radio stations and public or private printed press than they were in Autumn 2018. The largest declines are in Tunisia for public and private TV channels (each -11 pp) and Morocco for public TV channels (-11 pp).

**B1T** Where do you get most of your news on national political matters? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
(%)





	Private TV Channels	Aut. 2019 - Aut. 2018	Public TV Channels	Aut. 2019 - Aut. 2018	Online social networks (Facebook, Twitter, etc.)	Aut. 2019 - Aut. 2018	Internet (blogs, websites)	Aut. 2019 - Aut. 2018	Public radio Stations	Aut. 2019 - Aut. 2018	Private printed press	Aut. 2019 - Aut. 2018	Public printed press	Aut. 2019 - Aut. 2018	Private radio Stations	Aut. 2019 - Aut. 2018
MAGHREB	45	▼ 4	39	▼10	36	=	30	▼ 3	13	▼ 6	9	▼ 5	8	▼ 3	7	▼ 5
MA 	38	▼ 6	44	▼11	24	▼ 9	15	▼ 3	15	▼ 5	7	▼ 2	4	▼ 1	8	▼ 2
DZ 	54	▼ 1	35	▼ 8	47	▲ 7	44	▼ 1	8	▼ 7	12	▼ 7	10	▼ 5	4	▼ 8
TN 	29	▼11	40	▼11	26	▼ 3	20	▼ 7	19	▼ 8	7	▼ 5	8	▼ 4	13	▼ 3

*Base: respondents Maghreb (N=3085)*

Lebanon is the only country in the Mashrek where an online source is not the most mentioned – here respondents are most likely to get their news from private TV channels (69%). Respondents in Israel most often mention the Internet (64%), while in Jordan (58%) and Palestine (50%) online social networks are most mentioned. Israel and Palestine are the only countries where the top two sources of news are online.

Compared to Autumn 2018, respondents in all four countries are now more likely to mention public TV channels and public radio stations. Respondents in Lebanon are now more likely to mention each source than they were in 2018, with the largest increase seen for the Internet (+9 pp). Other large increases include a ten-point increase in Jordan for public TV channels and declines in Palestine for the Internet (-16 pp) and online social networks (-14 pp).

**B1T** Where do you get most of your news on national political matters? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
(%)

	Online social networks (Facebook, Twitter, etc.)	Aut. 2019 - Aut. 2018	Internet (blogs, websites)	Aut. 2019 - Aut. 2018	Private TV Channels	Aut. 2019 - Aut. 2018	Public TV Channels	Aut. 2019 - Aut. 2018	Public radio Stations	Aut. 2019 - Aut. 2018	Private printed press	Aut. 2019 - Aut. 2018	Private radio Stations	Aut. 2019 - Aut. 2018	Public printed press	Aut. 2019 - Aut. 2018
MASHREK	50	▼ 2	49	=	45	=	43	▲ 7	20	▲ 3	16	=	15	▼ 1	14	▲ 1
IL 	43	=	64	▼ 2	42	▼ 2	42	▲ 3	29	▲ 3	30	▼ 2	20	=	23	▼ 1
JO 	58	▲ 2	34	▲ 5	41	▼ 4	54	▲ 10	9	▲ 1	1	=	4	▼ 2	4	▲ 1
LB 	50	▲ 5	39	▲ 9	69	▲ 1	28	▲ 5	11	▲ 1	9	▲ 1	16	▲ 3	6	▲ 3
PS 	50	▼ 14	48	▼ 16	33	▲ 1	41	▲ 9	27	▲ 5	15	▼ 2	22	▼ 2	18	▲ 3

Base: respondents in Mashrek (N=4000)





Highlights from the socio-demographic analysis include the following:

- In the **Maghreb**, men are more likely than women to say they get their national political news via Internet and social media (54% vs 44%) or the printed press (18% vs 12%).
- In both the **Maghreb** and the **Mashrek**, the older the respondent, the more likely they are to mention television or radio and the less likely they are to mention the Internet and social media. In the **Mashrek**, those aged 55 and older (32%) are the most likely to mention press.
- In both the **Maghreb** and the **Mashrek**, those who remained in education until at least age 16 are the most likely to mention the Internet and social media or the printed press.
- In the **Maghreb**, those living in towns are more likely to mention the Internet and social media and less likely to mention radio than those living in rural villages.

The analysis also shows that respondents who feel well-informed about the EU are more likely to get their news from each of these sources than those who do not feel well-

informed. In the Maghreb this pattern only applies for the Internet and social media (54% vs 46%). In addition, respondents in the Maghreb who have relatives living in the EU are more likely to get their news from the Internet and social media than those who do not (56% vs 41%). The same pattern applies in the Mashrek for radio (35% vs 26%).

**B1T** Where do you get most of your news on national political matters? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
(% - **MAGHREB**)

	Public printed press	Private printed press	Public TV Channels	Private TV Channels	Public radio Stations	Private radio Stations	Internet (blogs, websites)	Online social networks (Facebook, Twitter, etc.)	Other (SPONTANEOUS)	You do not look for news on national	Don't know	Total 'Press'	Total 'Television'	Total 'Radio'	Total 'Internet and Social Media'
<b>MAGHREB</b>	8	9	39	45	13	7	30	36	3	14	5	15	63	17	49
 <b>Gender</b>															
Male	9	11	37	44	12	7	33	40	3	12	4	18	62	16	54
Female	6	8	41	45	13	8	27	32	2	16	6	12	63	18	44
 <b>Age</b>															
15-24 years	7	6	36	39	10	5	35	48	2	15	4	11	57	13	59
25-39 years	7	9	38	42	10	8	32	43	2	13	6	13	62	16	56
40-54 years	10	12	41	48	15	8	29	28	3	12	5	18	67	20	43
55 years or more	8	13	45	52	17	8	19	15	3	16	6	17	67	21	26
 <b>Education (End of)</b>															
15-	5	8	48	49	14	9	21	25	3	15	5	12	65	20	34
16-19	9	12	41	52	11	6	35	38	3	9	3	18	71	15	56
20 or more	8	14	32	48	11	8	42	49	2	9	3	18	64	16	67
Still studying	8	6	33	40	10	4	37	49	2	16	3	11	56	12	61
 <b>Subjective urbanisation</b>															
Rural area or village	7	9	43	43	16	9	23	30	2	17	7	12	62	21	38
Small/mid size town	7	11	37	50	8	4	32	40	4	9	4	16	65	10	54
Large town	8	9	38	44	12	7	33	38	2	14	5	16	63	16	53
<b>Relatives living in the EU</b>															
Yes	9	11	38	44	13	7	35	41	3	11	4	17	63	17	56
No	6	8	41	46	12	7	24	31	2	17	7	12	63	16	41
<b>Informed about the EU</b>															
Well-informed	10	12	41	47	13	9	31	41	2	11	3	18	66	19	54
Not informed	6	8	39	44	12	6	30	32	3	15	6	12	62	15	46

**B1T** Where do you get most of your news on national political matters? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
 (% - MASHREK)

	Public printed press	Private printed press	Public TV Channels	Private TV Channels	Public radio Stations	Private radio Stations	Internet (blogs, websites)	Online social networks (Facebook, Twitter, etc.)	Other (SPONTANEOUS)	You do not look for news on national	Don't know	Total 'Press'	Total 'Television'	Total 'Radio'	Total 'Internet and Social Media'
MASHREK	14	16	43	45	20	15	49	50	2	6	3	25	67	28	68
Gender															
Male	14	17	42	45	20	17	51	49	3	5	3	26	66	29	69
Female	14	15	43	44	20	14	47	50	2	6	2	24	67	28	67
Age															
15-24 years	14	15	39	37	16	12	52	57	3	7	4	24	59	23	74
25-39 years	12	13	37	42	18	15	50	57	3	6	2	21	62	26	73
40-54 years	16	17	44	49	23	18	48	45	3	5	1	25	71	32	66
55 years or more	16	22	54	55	26	17	43	33	1	4	2	32	79	35	57
Education (End of)															
15-	5	7	46	58	16	14	26	37	1	10	2	10	75	25	46
16-19	16	17	44	45	21	16	50	50	2	5	2	27	68	29	71
20 or more	16	19	39	45	24	17	57	52	3	4	2	29	65	33	74
Still studying	14	15	40	35	11	11	51	57	3	7	4	24	58	18	74
Subjective urbanisation															
Rural area or village	15	18	43	45	20	13	48	49	3	7	3	27	66	27	68
Small/mid size town	12	14	41	49	18	15	44	48	3	7	2	21	68	26	65
Large town	16	17	44	43	22	16	52	51	2	4	3	27	66	31	71
<b>Relatives living in the EU</b>															
Yes	17	19	39	51	25	19	53	53	3	4	0	29	69	35	71
No	13	15	44	43	18	14	47	48	2	6	3	24	66	26	68
<b>Informed about the EU</b>															
Well-informed	17	21	45	49	24	19	57	53	3	2	2	31	71	34	75
Not informed	11	11	40	42	16	11	40	47	2	9	3	18	63	23	62

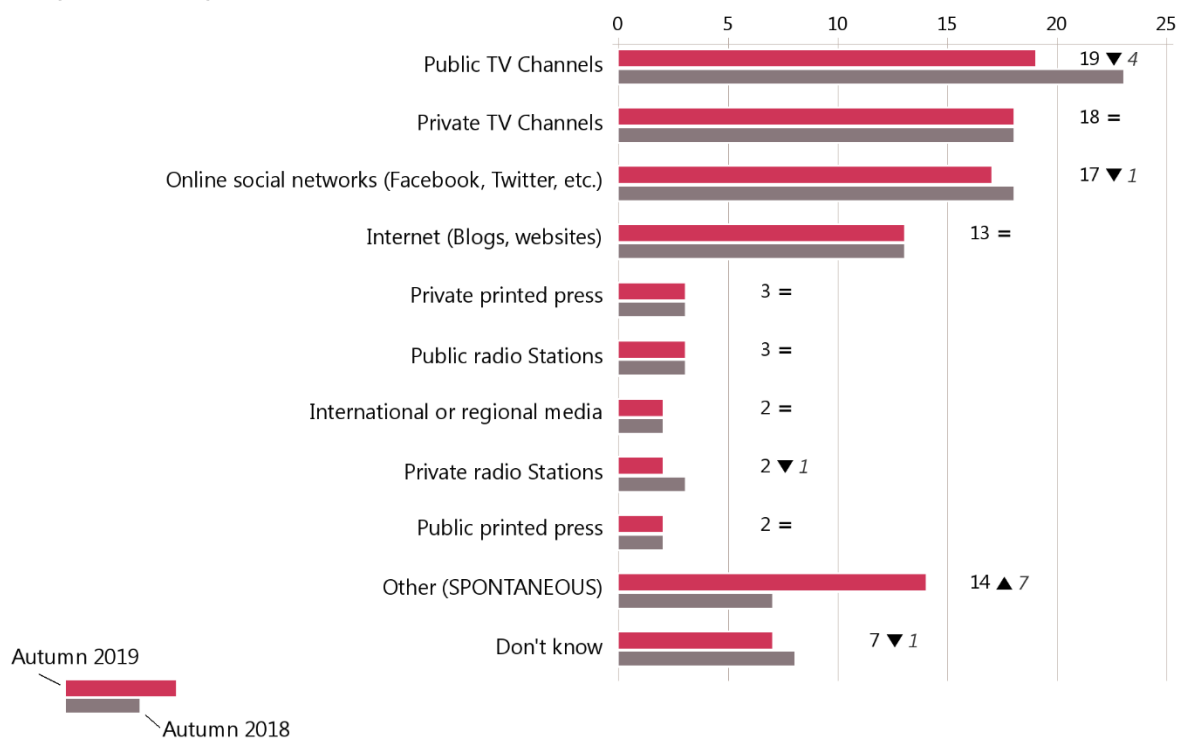
## Trust in information sources

Respondents were also asked the sources of information they trust most when looking for news on political matters<sup>31</sup>. Respondents in the Maghreb are most likely to trust public TV channels (19%), private TV channels (18%), online social networks (17%) or the Internet (13%). In the Mashrek, the Internet is the most trusted (20%) source, followed by public TV channels (18%), private TV channels and online social networks (17% each).

Unlike the previous wave, there are generally few differences between the Maghreb and the Mashrek, although trust in the Internet is higher in the Mashrek (20% vs 13% in Maghreb).

There have been few changes since Autumn 2018, with the largest change a four-point decline in mentions of public TV channels in the Maghreb, and a four-point increase in the mentions of them in the Mashrek.

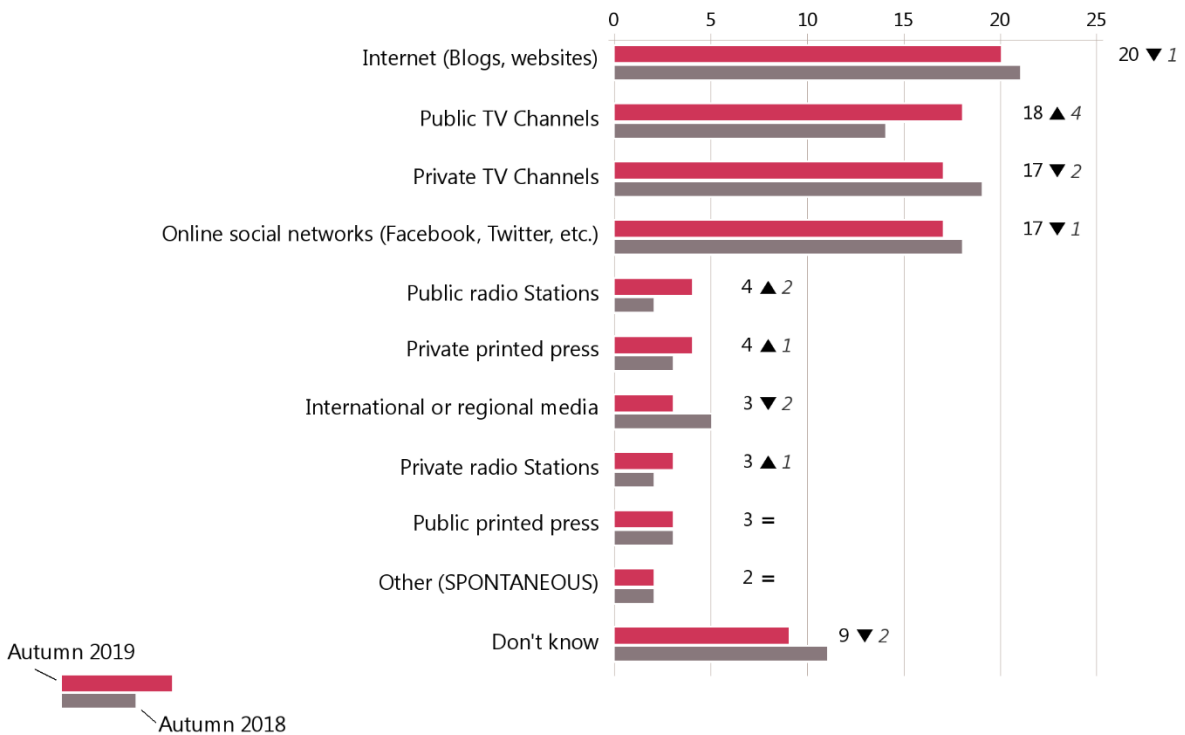
**B2** Which source of information do you trust the most when looking for news on political matters?  
(% - MAGHREB)



Base: respondents in Maghreb (N=3085)

<sup>31</sup> B2. Which source of information do you trust the most when looking for news on political matters?

**B2** Which source of information do you trust the most when looking for news on political matters?  
(% - MASHREK)



Base: respondents in Mashrek (N=4000)

Respondents in Morocco (23%) are most likely to trust public TV channels, as are those in Tunisia (22%). Respondents in Algeria are most likely to trust private TV channels (23%), and they are also much more likely than those in the other countries to trust the Internet (18%). Online social networks are the second most trusted source in all three countries.

Changes since Autumn 2018 are relatively minor, with the exception of a nine-point decline in trust of public TV channels in Tunisia. Respondents here are now also less likely to trust international or regional media (-6 pp). Trust in private TV channels declined five points in Morocco but increased five points in Algeria.

**B2** Which source of information do you trust the most when looking for news on political matters?  
(%)

	Public TV Channels	Aut. 2019 - Aut. 2018	Private TV Channels	Aut. 2019 - Aut. 2018	Online social networks (Facebook, Twitter, etc.)	Aut. 2019 - Aut. 2018	Internet (Blogs, websites)	Aut. 2019 - Aut. 2018	Private printed press	Aut. 2019 - Aut. 2018	Public radio Stations	Aut. 2019 - Aut. 2018	International or regional media	Aut. 2019 - Aut. 2018	Public printed press	Aut. 2019 - Aut. 2018	Private radio Stations	Aut. 2019 - Aut. 2018
MAGHREB	19	▼ 4	18	=	17	▼ 1	13	=	3	=	3	=	2	=	2	=	2	▼ 1
MA	23	▼ 3	15	▼ 5	17	▼ 2	7	=	2	▲ 1	3	=	2	=	1	▼ 1	3	=
DZ	15	▼ 2	23	▲ 5	17	▼ 2	18	=	5	▲ 1	2	=	2	▲ 2	2	▼ 1	1	▼ 2
TN	22	▼ 9	10	▼ 2	15	=	8	▼ 4	3	▲ 1	4	=	3	▼ 6	3	=	3	=

Base: respondents in Maghreb (N=3085)

In three out of four countries in the Mashrek, an online source is the most trusted for political news. In Israel it is the Internet (26%) and in Jordan and Palestine it is online social networks (24% and 27% respectively). Private TV channels are the most mentioned in Lebanon (40%), and they are much more likely to be mentioned here than in the other countries in the Mashrek. Respondents in Jordan are much more likely to mention public TV channels (36%) than those in other countries.

Compared to Autumn 2018, respondents in Jordan are now more likely to mention public TV channels (+12 pp). Respondents in Palestine are now less likely to mention the Internet (-6 pp), while those in Lebanon are more likely to mention the Internet (+5 pp) and less likely to mention private TV channels (-5 pp).

**B2** Which source of information do you trust the most when looking for news on political matters? (%)

	Internet (Blogs, websites)	Aut. 2019 - Aut. 2018	Public TV Channels	Aut. 2019 - Aut. 2018	Private TV Channels	Aut. 2019 - Aut. 2018	Online social networks (Facebook, Twitter, etc.)	Aut. 2019 - Aut. 2018	Public radio Stations	Aut. 2019 - Aut. 2018	Private printed press	Aut. 2019 - Aut. 2018	International or regional media	Aut. 2019 - Aut. 2018	Private radio Stations	Aut. 2019 - Aut. 2018	Public printed press	Aut. 2019 - Aut. 2018
MASHREK	20	▼ 1	18	▲ 4	17	▼ 2	17	▼ 1	4	▲ 2	4	▲ 1	3	▼ 2	3	▲ 1	3	=
IL	26	=	12	=	11	▼ 3	9	=	5	▲ 2	8	▲ 4	4	▼ 2	2	=	3	▼ 1
JO	14	▼ 1	36	▲ 12	16	▼ 4	24	▼ 1	1	=	1	=	0	▼ 3	1	=	2	▲ 1
LB	20	▲ 5	8	▼ 1	40	▼ 5	16	▲ 1	3	▲ 2	3	▲ 2	0	▼ 3	2	=	2	▲ 2
PS	17	▼ 6	12	▲ 4	10	▲ 1	27	▲ 1	7	▲ 4	2	▼ 1	6	▼ 3	7	▲ 3	3	▼ 1






Base: respondents in Mashrek (N=4000)

The socio-demographic analysis shows:






- In the **Maghreb**, men are more likely to mention the Internet and social media (36% vs 23% of women) and less likely to mention television (33% vs 41%).
- In both the **Maghreb** and the **Mashrek**, the older the respondent, the more likely they are to mention television and the less likely they are to mention the Internet and social media. For example, 43% of 15-24 years old in the Mashrek mention the Internet and social media, compared to 25% of those aged 55 or older.
- In both the **Maghreb** and the **Mashrek**, the longer a respondent remained in education, the more likely they are to mention the Internet and social media, and the less likely they are to mention television. The differences are greatest in the Mashrek.
- In both the **Maghreb** and the **Mashrek**, retired persons are the most likely to mention television (50% and 45% respectively). The analysis also shows that in both the Maghreb and the Mashrek, respondents who have a positive opinion of the EU are more likely to trust television than those with a negative view.



**B2** Which source of information do you trust the most when looking for news on political matters?  
(% - MAGHREB)

	Public printed press	Private printed press	Public TV Channels	Private TV Channels	Public radio Stations	Private radio Stations	Internet (Blogs, websites)	Online social networks (Facebook, Twitter, etc.)	International or regional media	Other (SPONTANEOUS)	Don't know	Total 'Press'	Total 'Television'	Total 'Radio'	Total 'Internet and Social Media'
MAGHREB	2	3	19	18	3	2	13	17	2	14	7	5	37	5	30
 Gender															
Male	2	4	16	17	2	2	17	19	3	11	7	6	33	4	36
Female	2	3	22	19	3	2	9	14	1	18	7	5	41	5	23
 Age															
15-24 years	2	3	14	16	3	2	14	25	2	13	6	5	30	5	39
25-39 years	2	3	17	16	2	1	16	19	3	15	6	5	33	3	35
40-54 years	2	4	22	21	2	3	11	13	3	12	7	6	43	5	24
55 years or more	2	3	26	23	3	2	6	5	1	18	11	5	49	5	11
 Education (End of)															
15-	2	2	25	22	4	2	9	12	2	14	6	4	47	6	21
16-19	2	4	17	20	1	1	17	18	2	11	7	6	37	2	35
20 or more	3	5	13	19	2	1	16	21	2	12	6	8	32	3	37
Still studying	2	3	15	15	3	3	15	24	2	13	5	5	30	6	39
 Occupation															
Self-employed	3	5	16	19	2	2	17	15	2	11	8	8	35	4	32
Managers	3	6	8	21	1	3	18	15	6	10	9	9	29	4	33
White collars	3	6	15	12	2	2	17	21	3	10	9	9	27	4	38
Manual workers	2	3	19	20	3	2	12	15	1	16	7	5	39	5	27
House persons	1	1	29	16	4	1	5	9	2	24	8	2	45	5	14
Unemployed	2	1	19	20	3	3	13	16	2	16	5	3	39	6	29
Retired	2	6	25	25	3	0	9	9	1	9	11	8	50	3	18
Students	2	3	16	15	2	3	13	25	3	13	5	5	31	5	38
 Opinion of the EU															
Positive	2	3	20	18	4	2	12	19	2	13	5	5	38	6	31
Neutral	3	5	18	20	2	2	14	14	2	14	6	8	38	4	28
Negative	3	3	15	17	2	3	15	20	3	12	7	6	32	5	35

**B2** Which source of information do you trust the most when looking for news on political matters?  
(% - MASHREK)

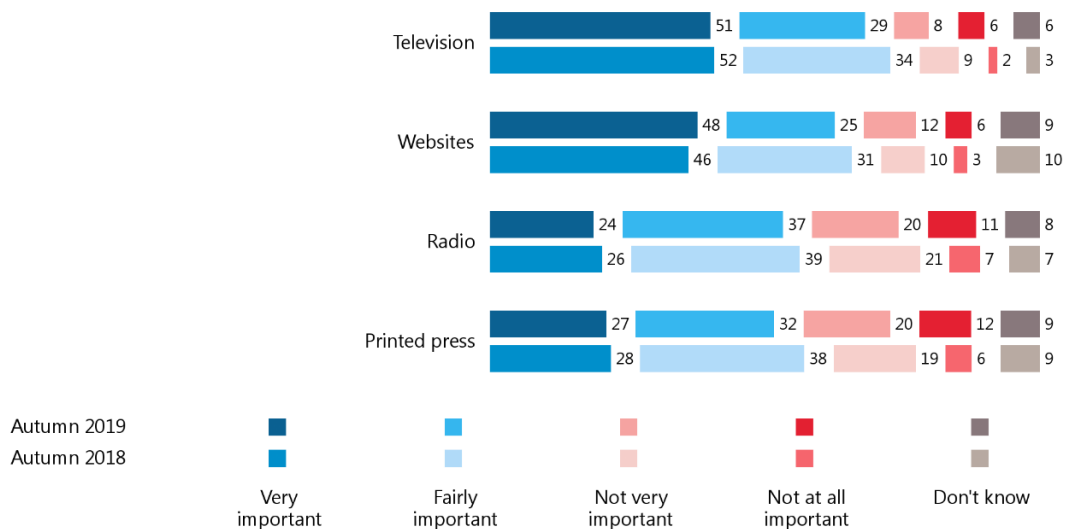
	Public printed press	Private printed press	Public TV Channels	Private TV Channels	Public radio Stations	Private radio Stations	Internet (Blogs, websites)	Online social networks (Facebook, Twitter, etc.)	International or regional media	Other (SPONTANEOUS)	Don't know	Total 'Press'	Total 'Television'	Total 'Radio'	Total 'Internet and Social Media'
MASHREK	3	4	18	17	4	3	20	17	3	2	9	7	35	7	37
 <b>Gender</b>															
Male	3	4	16	17	4	3	21	18	2	2	10	7	33	7	39
Female	2	4	19	18	4	3	18	17	3	3	9	6	37	7	35
 <b>Age</b>															
15-24 years	3	3	17	14	3	2	23	20	2	2	11	6	31	5	43
25-39 years	2	4	15	16	4	3	21	21	3	2	9	6	31	7	42
40-54 years	3	4	20	18	5	3	19	16	3	3	6	7	38	8	35
55 years or more	2	6	21	23	5	3	15	10	3	2	10	8	44	8	25
 <b>Education (End of)</b>															
15-	2	1	24	30	3	4	13	15	1	3	4	3	54	7	28
16-19	3	4	19	17	4	2	19	16	3	2	11	7	36	6	35
20 or more	2	4	13	15	4	4	25	18	3	3	9	6	28	8	43
Still studying	3	4	16	14	4	1	23	19	3	2	11	7	30	5	42
 <b>Occupation</b>															
Self-employed	2	2	12	26	4	4	20	19	2	1	8	4	38	8	39
Managers	2	6	10	13	4	3	28	18	3	3	10	8	23	7	46
White collars	2	4	15	14	6	3	22	16	2	4	12	6	29	9	38
Manual workers	2	2	22	20	5	2	17	18	3	2	7	4	42	7	35
House persons	3	2	24	20	3	4	15	19	2	2	6	5	44	7	34
Unemployed	2	3	26	15	3	2	18	19	3	3	6	5	41	5	37
Retired	3	8	24	21	4	2	15	6	7	1	9	11	45	6	21
Students	3	5	15	14	3	1	22	19	3	2	13	8	29	4	41
 <b>Opinion of the EU</b>															
Positive	2	3	19	19	4	3	21	19	3	2	5	5	38	7	40
Neutral	3	5	16	15	4	2	20	16	4	2	13	8	31	6	36
Negative	3	4	17	16	5	2	20	17	1	4	11	7	33	7	37

## Perceived influence of media channels

At least eight in ten respondents in the Maghreb (80%) and the Mashrek (85%) think national TV has an important role in influencing public opinion. At least six in ten in each group of countries say radio has an important role (Maghreb: 61%, Mashrek: 65%). Print is mentioned by 59% in the Maghreb and 64% in the Mashrek. The largest difference is for websites: 73% in the Maghreb say national websites are important in influencing public opinion, compared to 87% in the Mashrek.

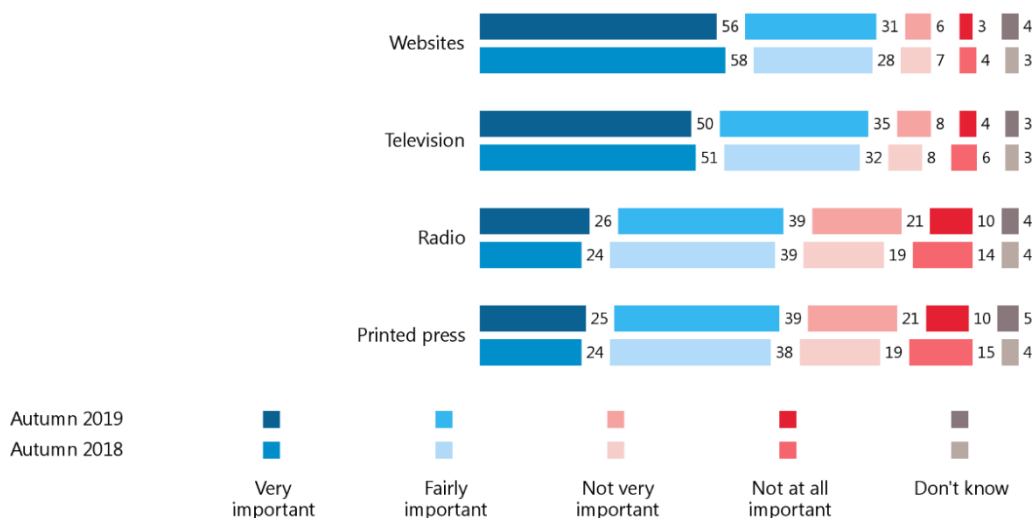
Compared to summer 2018, respondents in Maghreb are now less likely to say print (-7 pp) and television (-6 pp), have an important role. There have only been minor changes in the Mashrek (1-3 pp).

**B3** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?  
(% - **MAGHREB**)



Base: respondents Maghreb (N=3085)

**B3** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?  
(% - **MASHREK**)






Base: respondents Mashrek (N=4000)

In all three countries in the Mashrek, television is most often mentioned as having an important role in influencing public opinion. However, in each country respondents are now less likely to say this than they were in Autumn 2018, with the largest decline in Morocco (-10 pp).

The majority of respondents in each country think each media type has an important role in influencing public opinion in their country. However, compared to Autumn 2018, respondents in Tunisia are now more likely to say this about the printed press (+8 pp) and radio (+5 pp) and less likely to say websites have an important role in shaping public opinion (-7 pp). Respondents in Morocco are less likely to say each of these media types have an important role, while in Algeria respondents are less likely to say the roles of the printed press (-13 pp) or radio (-5 pp) are important.




**B3.1** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?

**Television (%)**

	Total 'Important'	Aut. 2019 - Aut. 2018	Total 'Not important'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	80	▼ 6	14	▲ 3	6	▲ 3
DZ 	82	▼ 2	15	▲ 3	3	▼ 1
TN 	72	▼ 8	11	▼ 3	17	▲ 11
MA 	81	▼ 10	14	▲ 6	5	▲ 4




**B3.2** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?

**Radio (%)**

	Total 'Important'	Aut. 2019 - Aut. 2018	Total 'Not important'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	61	▼ 4	31	▲ 3	8	▲ 1
TN 	68	▲ 5	14	▼ 16	18	▲ 11
DZ 	55	▼ 5	39	▲ 8	6	▼ 3
MA 	65	▼ 8	28	▲ 5	7	▲ 3



**B3.3** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?

**Printed press (%)**

	Total 'Important'	Aut. 2019 - Aut. 2018	Total 'Not important'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	59	▼ 7	32	▲ 7	9	=
TN 	57	▲ 8	23	▼ 17	20	▲ 9
MA 	58	▼ 5	33	▲ 5	9	=
DZ 	60	▼ 13	34	▲ 15	6	▼ 2

**B3.4** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?

**Websites (%)**

	Total 'Important'	Aut. 2019 - Aut. 2018	Total 'Not important'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	73	▼ 4	18	▲ 5	9	▼ 1
DZ 	79	▼ 1	15	▲ 4	6	▼ 3
MA 	69	▼ 4	22	▲ 6	9	▼ 2
TN 	66	▼ 7	13	▼ 2	21	▲ 9

Base: Respondents Maghreb (N=3085)

The majority of respondents in each country in Mashrek say each of these media types has an important role in influencing public opinion. In Palestine (84%) and Lebanon (92%) respondents are most likely to say this about television, while in Jordan websites (89%) are most often seen as having an important role. In Israel television and websites are equally mentioned as important (both 89%).

The country trends are mixed. Respondents in Palestine are now more likely to say each media type has an important role, particularly the printed press (+10 pp) and radio (+7 pp). Respondents in Lebanon, on the other hand, are now less likely to say radio (-6 pp) or the printed press (-5 pp) have an important role.

**B3.1** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?

**Television (%)**

	Total 'Important'	Aut. 2019 - Aut. 2018	Total 'Not important'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	85	▲ 2	12	▼ 2	3	=
PS	84	▲ 6	13	▼ 5	3	▼ 1
LB	92	▲ 4	8	▼ 4	0	=
JO	79	▲ 2	20	▼ 2	1	=
IL	89	=	7	=	4	=

**B3.2** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?

**Radio (%)**

	Total 'Important'	Aut. 2019 - Aut. 2018	Total 'Not important'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	65	▲ 2	31	▼ 2	4	=
PS	77	▲ 7	20	▼ 6	3	▼ 1
JO	55	▲ 4	42	▼ 4	3	=
IL	71	▼ 1	24	=	5	▲ 1
LB	54	▼ 6	40	▲ 2	6	▲ 4

**B3.3** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?

**Printed press (%)**

	Total 'Important'	Aut. 2019 - Aut. 2018	Total 'Not important'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	64	▲ 2	31	▼ 3	5	▲ 1
PS	72	▲ 10	24	▼ 9	4	▼ 1
JO	50	▲ 2	46	▼ 2	4	=
IL	75	▼ 3	20	▲ 2	5	▲ 1
LB	52	▼ 5	41	=	7	▲ 5

**B3.4** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?

**Websites (%)**

	Total 'Important'	Aut. 2019 - Aut. 2018	Total 'Not important'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	87	▲ 1	9	▼ 2	4	▲ 1
LB	84	▲ 4	11	▼ 7	5	▲ 3
PS	83	▲ 4	13	▼ 4	4	=
IL	89	▼ 1	6	=	5	▲ 1
JO	89	▼ 2	7	=	4	▲ 2

Base: Respondents Mashrek (N=4000)

Highlights from the socio-demographic analysis include:







- In the **Maghreb**, men are more likely than women to say websites have an important role in influencing public opinion (76% vs 71%).
- In the **Maghreb**, those aged 55 and older are the least likely to say each media type has an important influence. In the **Mashrek**, on the other hand, those aged 55 and older are the most likely to say radio (71%) and the printed press (70%) have an important role.
- In both the **Maghreb** and the **Mashrek**, those who completed education aged 16 or older are the most likely to say websites have an important role. In addition, in

the **Mashrek**, respondents who completed education aged 20 or older are the most likely to say radio (71%) and the printed press (70%) have an important role.

- In the **Maghreb**, the more urbanised a respondent's environment, the more likely they are to say websites have an important role: 77% living in large towns say this, compared to 68% living in rural areas. In the **Mashrek**, those living in towns are the most likely to say websites have an important role.
- In both the **Maghreb** and the **Mashrek**, managers are the most likely to say the printed press has an important role (72%) and (75%) respectively.







The analysis also shows that respondents in the Maghreb with a positive opinion about the EU, or those who say relations between the EU and their country are good are more likely to say each type of media has an important role in influencing public opinion than those with a negative image. In the Mashrek, this pattern also applies – but only for TV and websites.

**B3** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?  
(% - **MAGHREB**)

	Television		Radio		Printed press		Websites	
	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'
MAGHREB	80	14	61	31	59	32	73	18
 Gender								
Male	80	15	60	33	59	33	76	16
Female	80	13	61	30	58	31	71	18
 Age								
15-24 years	82	14	62	31	61	33	81	14
25-39 years	82	14	61	34	61	32	78	17
40-54 years	78	16	61	31	58	33	71	18
55 years or more	76	13	55	28	52	30	55	23
 Education (End of)								
15-	79	14	62	28	58	30	66	20
16-19	80	17	59	34	60	34	79	16
20 or more	80	17	58	39	58	37	80	16
Still studying	83	14	62	32	64	31	81	15
 Subjective urbanisation								
Rural area or village	81	14	64	28	56	34	68	21
Small/mid size town	78	15	56	36	57	33	72	17
Large town	80	15	60	32	61	31	77	15
 Occupation								
Self-employed	79	16	67	28	61	32	79	15
Managers	83	16	62	35	72	26	87	9
White collars	81	16	58	39	61	35	84	11
Manual workers	77	14	58	30	53	33	65	21
House persons	80	11	64	23	55	29	64	19
Unemployed	79	17	57	36	57	35	69	22
Retired	81	12	55	32	57	29	61	19
Students	84	13	62	31	63	31	81	15
 Opinion of the EU								
Positive	86	11	67	28	66	28	81	13
Neutral	81	15	57	35	58	35	70	22
Negative	75	20	58	35	55	38	72	21
<b>Relations between EU and country</b>								
Good	86	11	66	28	65	29	78	15
Bad	75	21	54	40	54	39	73	21



**B3** In your opinion, how important or not is the role of the (NATIONALITY) ... in influencing public opinion?  
(% - MASHREK)

	Television		Radio		Printed Press		Websites	
	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'	Total 'Important'	Total 'Not important'
MASHREK	85	12	65	31	64	31	87	9
 Gender								
Male	85	12	64	32	64	31	88	8
Female	86	11	65	30	64	31	86	9
 Age								
15-24 years	84	13	59	37	61	34	88	9
25-39 years	84	13	63	32	62	33	88	9
40-54 years	87	11	69	29	65	32	88	9
55 years or more	89	9	71	24	70	24	84	8
 Education (End of)								
15-	85	14	60	36	53	38	81	11
16-19	85	12	65	31	64	32	89	8
20 or more	88	10	71	26	70	27	91	6
Still studying	84	13	57	38	62	33	88	9
 Subjective urbanisation								
Rural area or village	85	12	65	31	63	32	83	11
Small/mid size town	85	13	57	38	59	36	89	8
Large town	86	11	69	27	68	28	88	8
 Occupation								
Self-employed	85	13	64	32	63	33	86	10
Managers	89	8	69	27	75	21	90	6
White collars	87	10	68	28	68	28	91	6
Manual workers	85	13	67	30	62	33	88	8
House persons	83	15	64	31	56	36	81	12
Unemployed	83	15	61	34	59	35	87	8
Retired	90	8	70	26	71	27	87	8
Students	85	12	58	37	62	33	89	8
 Opinion of the EU								
Positive	89	10	66	31	64	33	90	7
Neutral	86	11	64	32	65	29	87	9
Negative	79	17	67	29	66	30	84	11
<b>Relations between EU and country</b>								
Good	87	12	66	31	62	34	90	7
Bad	83	14	65	31	70	26	85	11

## 2. Getting information on the European Union

### Frequency of research on the European Union

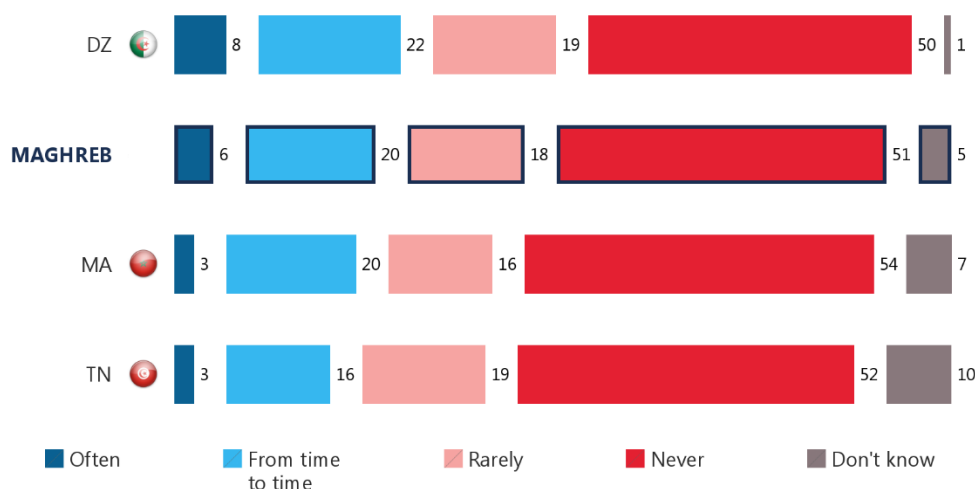
Just over four in ten (44%) respondents in the Maghreb and 50% in the Mashrek say they look for information on the European Union<sup>32</sup>. As was the case in the last report these results are very similar to the proportions of respondents who say they feel well informed about the EU (Maghreb: 44%, Mashrek: 51%).

Just 6% of respondents in the Maghreb and 3% in the Mashrek say they often look for information on the EU, with around one in five looking from time to time (Maghreb: 20%, Mashrek: 18%). Respondents in the Mashrek (29%) are more likely than those in the Maghreb (18%) to say they rarely look for information on the EU, while 51% in the Maghreb and 47% in the Mashrek say they never look for information on the EU.

There has been little change in the proportions of respondents who look for information on the EU compared to summer 2018.

In the Maghreb, respondents in Algeria (49%) are the most likely to look for information on the European Union. Compared to Autumn 2018, respondents in Morocco (+5 pp) are now more likely to say they look for information on the EU, while those in Tunisia (-7 pp) are less likely to do so.

**B4** How often do you look for information on the European Union?  
(%)



*Base: respondents Maghreb (N=3085)*

<sup>32</sup> B4. How often do you look for information on the European Union?

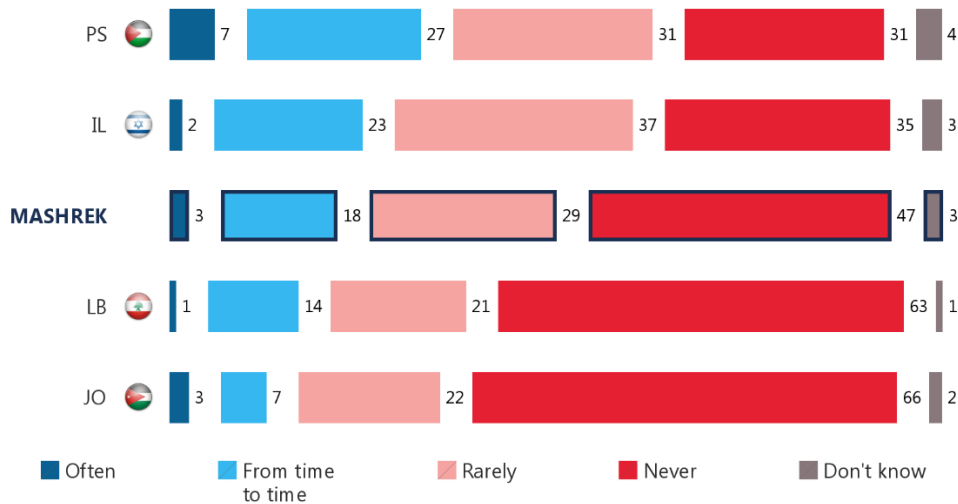
**B4** How often do you look for information on the European Union?  
(%)

	Total 'Look for information'	Aut. 2019 - Aut. 2018	Never	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	44	=	51	▲ 1	5	▼ 1
MA 	39	▲ 5	54	▼ 6	7	▲ 1
DZ 	49	▼ 2	50	▲ 6	1	▼ 4
TN 	38	▼ 7	52	▲ 5	10	▲ 2

*Base: respondents Maghreb (N=3085)*

Respondents in Palestine (65%) and Israel (62%) are much more likely to look for information on the EU than those in Lebanon (36%) or Jordan (32%). Jordan is the only country where there has been a notable change since Autumn 2018, with a 13-point increase in the proportion of respondents who look for information.

**B4** How often do you look for information on the European Union? (%)



Base: respondents Mashrek (N=4000)

**B4** How often do you look for information on the European Union? (%)

	Total 'Look for information'	Aut. 2019 - Aut. 2018	Never	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	50	▲ 2	47	▼ 2	3	=
JO	32	▲ 13	66	▼ 14	2	▲ 1
IL	62	=	35	=	3	=
LB	36	▼ 3	63	▲ 2	1	▲ 1
PS	65	▼ 4	31	▲ 7	4	▼ 3







Base: respondents Mashrek (N=4000)

The socio-demographic analysis shows the following:







- In both the **Maghreb** and the **Mashrek**, men are more likely to look for information than women. For instance, in the Maghreb 50% of men do so compared to 38% of women.
- In the **Maghreb**, those aged 15-39 are the most likely to look for information on the EU. In the **Mashrek**, on the other hand, it is respondents aged 55 or older (55%) who are most likely to do so.
- In both the **Maghreb** and the **Mashrek**, the longer a respondent remained in education, the more likely they are to look for information on the EU. For example, in the Mashrek 59% who completed education aged 20 or older look for information on the EU, compared to 33% who completed education aged 15 or younger.
- In both the **Maghreb** and the **Mashrek**, the more urbanised a respondents' environment, the more likely they are to look for information.
- In both the **Maghreb** and the **Mashrek**, managers are the most likely to look for information on the EU (56% and 62% respectively) compared to respondents in other professions.

The analysis also shows that in the **Maghreb** and the **Mashrek**, respondents who have relatives living in the EU, who have a positive opinion of the EU, or those who feel well informed about the EU are more likely to look for information. For instance, in the Mashrek 63% of respondents with relatives in the EU look for information on the EU, compared to 45% who do not have relatives in the EU. Finally, respondents in the Mashrek who say their country has a bad relationship with the EU are more likely to look for information than those who say the relationship between the EU and their country is good (63% vs 50%).

**B4** How often do you look for information on the European Union?  
(% - **MAGHREB**)

	Total 'Look for information'
MAGHREB	44
 Gender	
Male	50
Female	38
 Age	
15-24 years	49
25-39 years	47
40-54 years	42
55 years or more	30
 Education (End of)	
15-	35
16-19	47
20 or more	56
Still studying	49
 Subjective urbanisation	
Rural area or village	37
Small/mid size town	43
Large town	48
 Occupation	
Self-employed	51
Managers	56
White collars	47
Manual workers	41
House persons	28
Unemployed	41
Retired	46
Students	49
<b>Relatives living in the EU</b>	
Yes	52
No	35
 Opinion of the EU	
Positive	50
Neutral	44
Negative	41
<b>Relations between EU and country</b>	
Good	48
Bad	47
<b>Informed about the EU</b>	
Well-informed	57
Not informed	35

**B4** How often do you look for information on the European Union?  
(% - **MASHREK**)

	Total 'Look for information'
MASHREK	50
 Gender	
Male	54
Female	46
 Age	
15-24 years	46
25-39 years	51
40-54 years	49
55 years or more	55
 Education (End of)	
15-	33
16-19	50
20 or more	59
Still studying	46
 Subjective urbanisation	
Rural area or village	45
Small/mid size town	46
Large town	54
 Occupation	
Self-employed	55
Managers	62
White collars	52
Manual workers	45
House persons	39
Unemployed	44
Retired	58
Students	50
<b>Relatives living in the EU</b>	
Yes	63
No	45
 Opinion of the EU	
Positive	56
Neutral	45
Negative	51
<b>Relations between EU and country</b>	
Good	50
Bad	63
<b>Informed about the EU</b>	
Well-informed	65
Not informed	35

## Sources of information

Respondents who said they looked for information on the EU were asked about the sources they would use<sup>33</sup>. The most mentioned sources in the Maghreb are: television (39%); books, brochures and information leaflets (26%); radio (23%); online social networks (14%); and daily newspapers (10%). In the Mashrek, the most mentioned sources are: the European Union's official website, Europa (39%); online social networks (30%); television (25%); the official website of the European Union Delegation in their country (21%); and discussions with relatives, friends or colleagues (18%).

Respondents in the Mashrek are more likely to mention almost all of these sources than respondents in the Maghreb, in particular the EU's website (39% vs 4% in Maghreb), the official website of the European Union Delegation in their country (21% vs 4%), or online social networks (30% vs 14%). Respondents in the Maghreb, on the other hand, are more likely to mention books, brochures or information leaflets (26% vs 7%), television (39% vs 25%), or the radio (23% vs 10%) as sources of information.

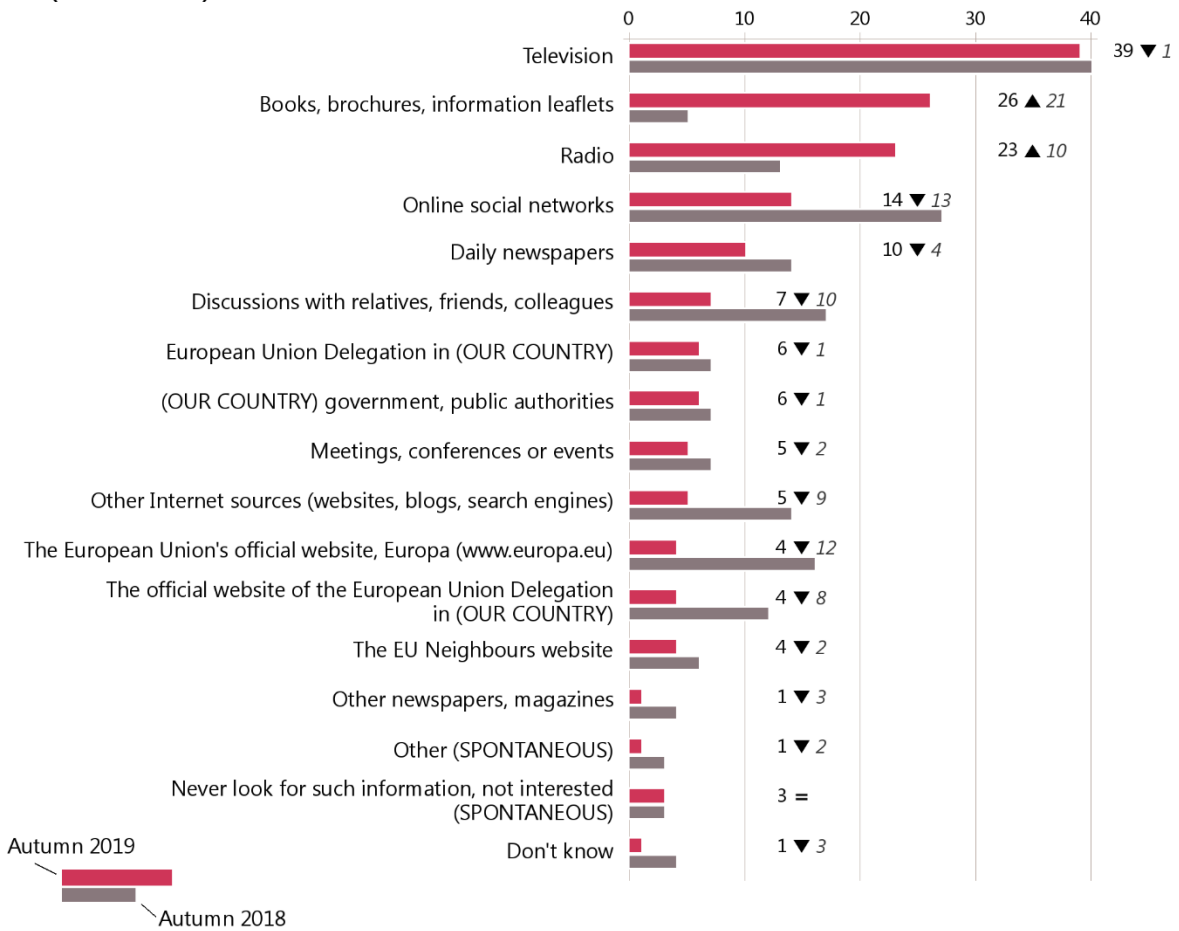
Compared to Autumn 2018, information-seeking respondents in the Maghreb are now much more likely to look for information in books, brochures or information leaflets (+21 pp) or on the radio (+10 pp), but they are less likely to use online social networks (-13 pp), the EU's official website (-12 pp) or to have discussions with relatives, friends or colleagues (-10 pp).

Respondents in the Mashrek, on the other hand, are now much more likely to mention the EU's official website Europa (+15 pp), the EU neighbours website (+10 pp), and they are also more likely to mention the official website of the EU delegation in their country (+5 pp). In addition, they are much less likely to mention other Internet sources (-27 pp).

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<sup>33</sup> B5. If you were looking for information about the European Union, its policies and institutions, which of the following sources, if any, would you use? Any others?

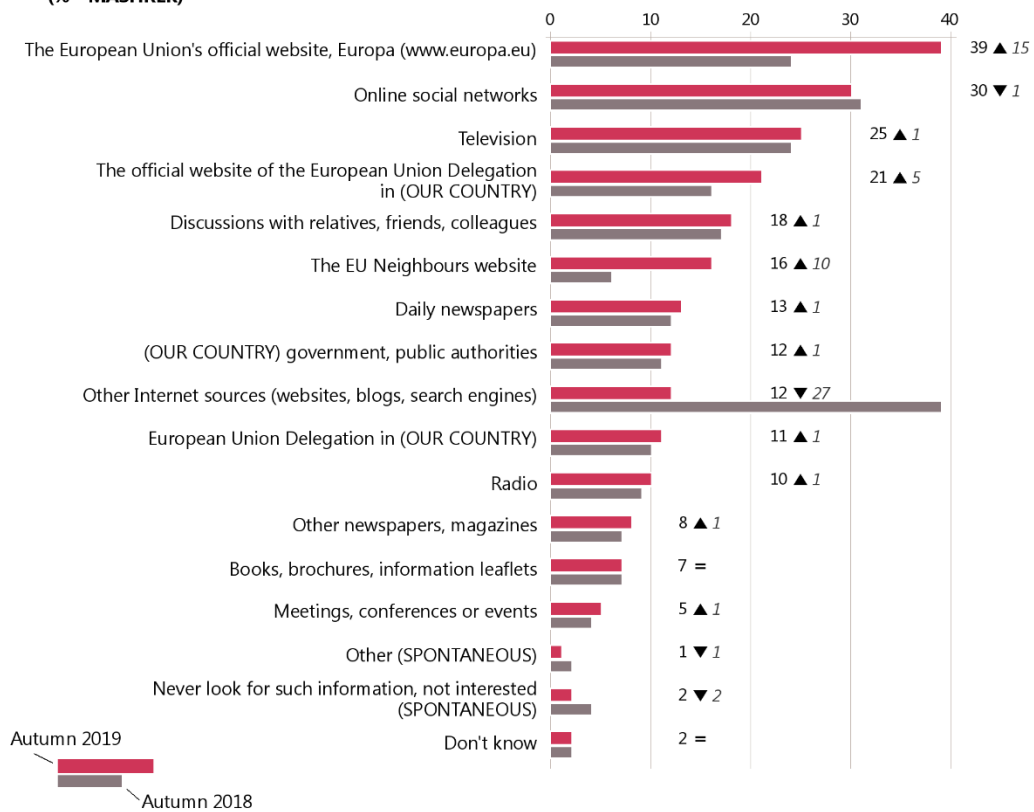
**B5** If you were looking for information about the European Union, its policies and institutions, which of the following sources, if any, would you use? Any others? (MULTIPLE ANSWERS POSSIBLE)  
 (% - **MAGHREB**)



Base: respondents in Maghreb that look for information (N=1347)



**B5** If you were looking for information about the European Union, its policies and institutions, which of the following sources, if any, would you use? Any others? (MULTIPLE ANSWERS POSSIBLE)  
 (% - MASHREK)






Base: respondents in Mashrek that look for information (N=2007)

In the Maghreb, respondents in Morocco (49%) and Tunisia (50%) are most likely to look for information about the EU on television, while those in Algeria are most likely to look for it in books, brochures or information leaflets (46%).

There have been large changes in Algeria since the previous wave, with large increases in the mentions of books, brochures and information leaflets (+39 pp) and the radio (+20 pp), and large declines in mentions of online social networks (-19 pp) and discussions with relatives, friends or colleagues (-15 pp). In Tunisia respondents are now also less likely to mention discussions (-8 pp) or online social networks (-6 pp).

**B5** If you were looking for information about the European Union, its policies and institutions, which of the following sources, if any, would you use? Any others? (MULTIPLE ANSWERS POSSIBLE)  
(%)

	Television	Aut. 2019 - Aut. 2018	Books, brochures, information leaflets	Aut. 2019 - Aut. 2018	Radio	Aut. 2019 - Aut. 2018	Online social networks	Aut. 2019 - Aut. 2018	Daily newspapers	Aut. 2019 - Aut. 2018	Discussions with relatives, friends, colleagues	Aut. 2019 - Aut. 2018	European Union Delegation in (OUR COUNTRY)	Aut. 2019 - Aut. 2018	(OUR COUNTRY) government, public authorities	Aut. 2019 - Aut. 2018
MAGHREB	39	▼ 1	26	▲ 21	23	▲ 10	14	▼ 13	10	▼ 4	7	▼ 10	6	▼ 1	6	▼ 1
MA 	49	=	4	▲ 2	13	=	15	▼ 2	7	▼ 1	21	▼ 3	7	▲ 1	6	▼ 2
DZ 	31	▼ 1	46	▲ 39	32	▲ 20	14	▼ 19	13	▼ 5	0	▼ 15	6	▼ 1	5	▼ 2
TN 	50	▼ 2	2	▼ 1	15	▼ 4	14	▼ 6	6	▼ 2	5	▼ 8	8	▲ 3	7	▲ 2

Base: respondents in Maghreb that look for information (N=1347)

Israel is the only country where respondents most often say they would look at the EU's official website (66%). Respondents in Jordan (44%) and Palestine (26%) most often mention online social networks, while those in Lebanon are most likely to say they would look on television (36%).

The trends since Autumn 2018 are mixed. Respondents in Israel are now much more likely to mention the EU's website (+39 pp) and the EU Neighbours website (+19 pp) but are much less likely to mention other internet sources (-50 pp). Respondents in Jordan are now more likely to mention online social networks or television (both +16 pp) but less likely to mention other internet sites (-15 pp), while those in Lebanon are more likely to mention discussions (+14 pp) but less likely to mention television (-11 pp). In Palestine respondents are now less likely to mention the EU's official website (-14 pp) or other internet sites (-10 pp).

**B5** If you were looking for information about the European Union, its policies and institutions, which of the following sources, if any, would you use? Any others? (MULTIPLE ANSWERS POSSIBLE) (%)

	The European Union's official website, Europa (www.europa.eu) Aut. 2019 - Aut. 2018	Online social networks Aut. 2019 - Aut. 2018	Television Aut. 2019 - Aut. 2018	The official website of the European Union Delegation in (OUR COUNTRY) Aut. 2019 - Aut. 2018	Discussions with relatives, friends, colleagues Aut. 2019 - Aut. 2018	The EU Neighbours website Aut. 2019 - Aut. 2018	Daily newspapers Aut. 2019 - Aut. 2018	(OUR COUNTRY) government, public authorities Aut. 2019 - Aut. 2018	Other internet sources (websites, blogs, search engines) Aut. 2019 - Aut. 2018
MASHREK	39 ▲15	30 ▼1	25 ▲1	21 ▲5	18 ▲1	16 ▲10	13 ▲1	12 ▲1	12 ▼27
IL	66 ▲39	28 ▼6	22 ▼3	30 ▲8	19 ▲2	24 ▲19	17 ▼2	13 ▲1	4 ▼50
JO	26 ▼7	44 ▲16	32 ▲16	8 ▲3	12 ▼4	5 ▲4	5 =	6 ▼1	13 ▼15
LB	10 ▲10	27 ▲9	36 ▼11	15 ▲6	28 ▲14	12 ▲6	12 ▲3	22 ▲8	20 ▲8
PS	12 ▼14	26 ▼7	21 ▲4	15 =	17 ▼2	11 ▲1	9 ▲4	11 ▲2	22 ▼10

Base: respondents in Mashrek that look for information (N=2007)

The socio-demographic analysis focusses on the top two sources in the Maghreb (television and books, brochures and information leaflets) and the Mashrek (The EU's official website and online social networks).

## Maghreb






- Men are more likely to say they would look for information on the EU in books, brochures or information leaflets (29% vs 23% of women).
- The older the respondent, the more likely they are to mention television and the less likely they are to mention books, brochures and information leaflets.
- The longer a respondent remained in education, the less likely they are to mention television. Those who completed education aged 16 or older (27%-28%) are more likely to mention books etc than those who completed education aged 15 or younger (19%).
- Respondents living in rural villages are the most likely to mention television (44%).

- Manual workers, housepersons (both 52%) and the retired (51%) are the most likely to mention television, while students (39%) are the most likely to mention books.






### **Mashrek**

- Respondents aged 55 and over are the most likely to say they would look on the EU's official website (55%), but the least likely to mention online social networks (24%).
- Those who completed education aged 16 or older are the most likely to mention the EU's official website.
- Retired persons (58%) and white-collar workers (54%) are more likely than other occupation groups to mention the EU's official website.

**B5** If you were looking for information about the European Union, its policies and institutions, which of the following sources, if any, would you use? Any others? (MULTIPLE ANSWERS POSSIBLE)  
(% - **MAGHREB**)

	Television	Books, brochures, information leaflets
MAGHREB	39	26
 <b>Gender</b>		
Male	39	29
Female	39	23
 <b>Age</b>		
15-24 years	34	46
25-39 years	35	25
40-54 years	46	15
55 years or more	55	9
 <b>Education (End of)</b>		
15-	55	19
16-19	42	27
20 or more	32	28
Still studying	31	41
 <b>Subjective urbanisation</b>		
Rural area or village	44	23
Small/mid size town	37	37
Large town	38	26
 <b>Occupation</b>		
Self-employed	35	25
Managers	30	27
White collars	32	20
Manual workers	52	25
House persons	52	18
Unemployed	39	27
Retired	51	12
Students	32	39

**B5** If you were looking for information about the European Union, its policies and institutions, which of the following sources, if any, would you use? Any others? (MULTIPLE ANSWERS POSSIBLE)  
(% - **MASHREK**)

	Online social networks	The European Union's official website, Europa
MASHREK	30	39
 <b>Gender</b>		
Male	30	40
Female	31	38
 <b>Age</b>		
15-24 years	34	33
25-39 years	31	32
40-54 years	32	41
55 years or more	24	55
 <b>Education (End of)</b>		
15-	27	15
16-19	29	45
20 or more	32	42
Still studying	34	34
 <b>Subjective urbanisation</b>		
Rural area or village	26	42
Small/mid size town	31	41
Large town	31	38
 <b>Occupation</b>		
Self-employed	33	30
Managers	26	43
White collars	26	54
Manual workers	34	24
House persons	30	22
Unemployed	32	21
Retired	29	58
Students	36	40

## Types of information

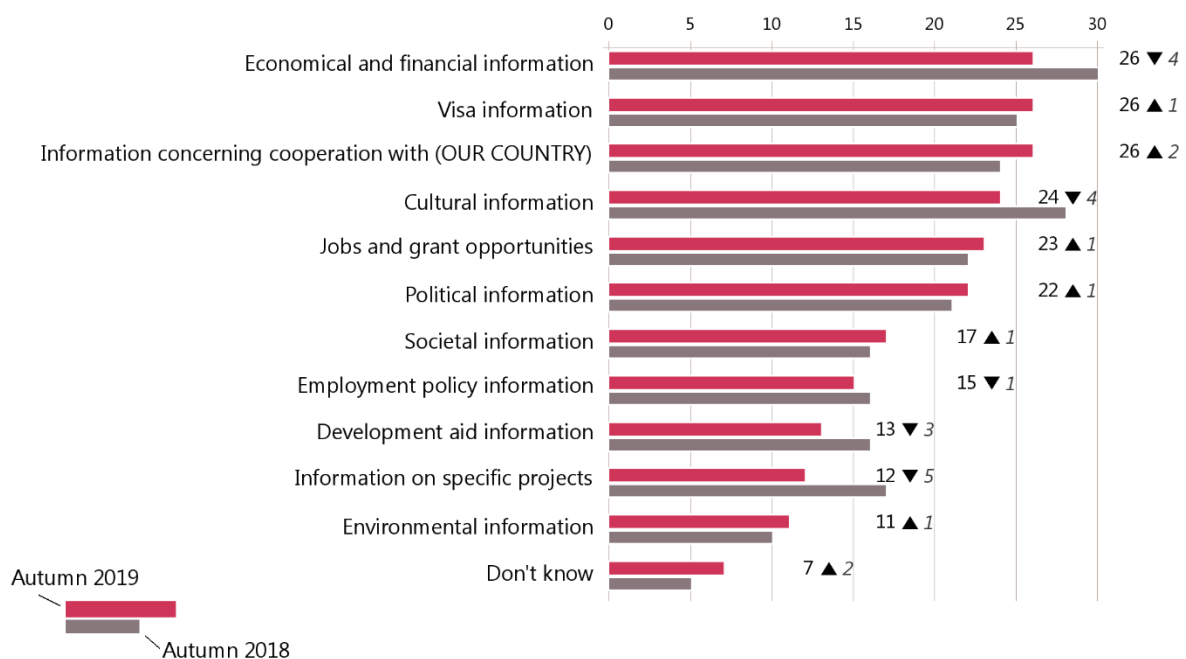
Respondents who look for information on the EU were asked about the types of information they look for<sup>34</sup>.

Those in the Maghreb most often mention economical and financial information, visa information, information concerning cooperation with their country (each 26%) and cultural information (24%). In the Mashrek, the most mentioned areas are economical and financial information (36%), information concerning cooperation with their country (32%), political information (26%) and cultural information (24%).

Although economical and financial information is the most mentioned topic in each group of countries, those in the Mashrek are more likely to look for this kind of information than respondents in the Maghreb (36% vs 26%). Respondents in the Maghreb are also less likely to mention information on specific projects (12% vs 19%) or information concerning cooperation with their country (26% vs 32%).

There have generally only been minor changes in the Maghreb since summer 2018, with the largest change being a five-point decline in mentions of information on specific projects. In the Mashrek, there has been a six-point decline in the mention of information about jobs and grant opportunities. This is the only change greater than four points.

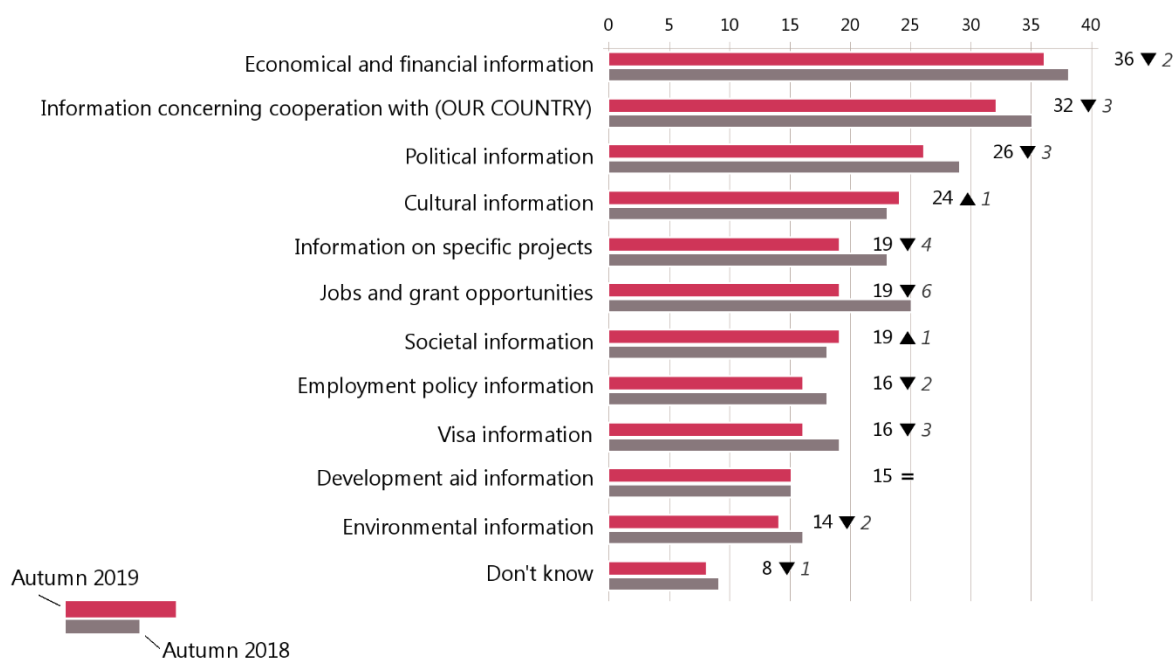
**B6** What type of information on the European Union do you look for? (MULTIPLE ANSWERS POSSIBLE)  
(% - MAGHREB)



Base: respondents in Maghreb that look for information (N=1347)

<sup>34</sup> B6. What type of information on the European Union do you look for?

**B6** What type of information on the European Union do you look for? (MULTIPLE ANSWERS POSSIBLE)  
 (% - MASHREK)






*Base: respondents in Mashrek that look for information (N=2007)*

Respondents in Morocco are most likely to look for information concerning cooperation with their country (33%), and they are much more likely to look for this information than those in other countries. Those in Algeria most often mention visa information (35%), while in Tunisia cultural information is most mentioned (25%). Respondents in Algeria are much more likely than those in other countries to look for economic and financial information, visa information or information about grants or job opportunities.

The largest changes since Autumn 2018 are observed in Tunisia, with respondents less likely to say they look for information on jobs and grant opportunities (-13 pp), economic and financial information or visa information (each -11 pp).





**B6** What type of information on the European Union do you look for? (MULTIPLE ANSWERS POSSIBLE)  
(%)

	Economical and financial information Aut. 2019 - Aut. 2018	Visa information Aut. 2019 - Aut. 2018	Information concerning cooperation with (OUR COUNTRY) Aut. 2019 - Aut. 2018	Cultural information Aut. 2019 - Aut. 2018	Jobs and grant opportunities Aut. 2019 - Aut. 2018	Political information Aut. 2019 - Aut. 2018	Societal information Aut. 2019 - Aut. 2018	Employment policy information Aut. 2019 - Aut. 2018
MAGHREB	26 ▼ 4	26 ▲ 1	26 ▲ 2	24 ▼ 4	23 ▲ 1	22 ▲ 1	17 ▲ 1	15 ▼ 1
MA 	21 ▼ 5	15 ▲ 7	33 ▼ 6	17 ▼ 6	17 ▼ 1	14 ▲ 1	9 ▼ 4	10 =
DZ 	32 ▼ 1	35 ▲ 2	23 ▲ 5	29 ▼ 3	28 ▲ 6	27 ▲ 4	21 ▲ 4	18 ▼ 2
TN 	17 ▼ 11	14 ▼ 11	18 ▼ 3	25 ▼ 3	17 ▼ 13	20 ▼ 6	16 ▼ 2	17 ▲ 1

Base: respondents in Maghreb that look for information (N=1347)

In Mashrek countries, respondents in Israel are most likely to say they look for information concerning cooperation with their country (41%). In Jordan, Lebanon (both 40%) and Palestine (29%) respondents most often say they look for economic and financial information. Respondents in Palestine and Jordan are less likely than those in the other countries to look for information concerning cooperation with their country. Respondents in Palestine are, on the other hand, much more likely to look for jobs and grant opportunities (35% vs 13%-15% in the other countries). Respondents in Israel are the most likely in the Mashrek to look for political information (34%), while respondents in Lebanon are the most likely to look for cultural information (38%).

**B6** What type of information on the European Union do you look for? (MULTIPLE ANSWERS POSSIBLE)  
(%)

	Economical and financial information Aut. 2019 - Aut. 2018	Information concerning cooperation with (OUR COUNTRY) Aut. 2019 - Aut. 2018	Political information Aut. 2019 - Aut. 2018	Cultural information Aut. 2019 - Aut. 2018	Information on specific projects Aut. 2019 - Aut. 2018	Jobs and grant opportunities Aut. 2019 - Aut. 2018	Societal information Aut. 2019 - Aut. 2018	Employment policy information Aut. 2019 - Aut. 2018	Visa information Aut. 2019 - Aut. 2018
MASHREK	36 ▼ 2	32 ▼ 3	26 ▼ 3	24 ▲ 1	19 ▼ 4	19 ▼ 6	19 ▲ 1	16 ▼ 2	16 ▼ 3
IL 	37 ▲ 3	41 ▼ 1	34 ▼ 3	22 ▼ 4	19 ▲ 2	15 ▲ 1	14 ▼ 2	10 ▲ 1	22 ▲ 2
JO 	40 ▼ 5	18 ▼ 13	21 ▼ 1	27 ▲ 2	12 ▼ 9	15 ▼ 3	27 ▲ 1	13 ▼ 7	4 ▼ 11
LB 	40 ▼ 7	35 ▲ 7	24 ▼ 11	38 ▲ 6	25 ▲ 4	13 ▼ 11	25 ▲ 3	36 ▲ 15	17 =
PS 	29 ▼ 7	21 ▼ 8	15 ▼ 2	18 ▲ 3	22 ▼ 9	35 ▼ 9	18 ▲ 2	20 ▼ 8	11 ▼ 10

Base: respondents in Mashrek that look for information (N=2007)



Highlights from the socio-demographic analysis include:

- In the **Maghreb**, men are more likely to say they look for economic and financial information (29% vs 23% of women) or visa information (29% vs 22%), but less likely to say they look for cultural information (21% vs 29%).
- In the **Maghreb**, respondents aged 55 and older are the most likely to look for information concerning cooperation with their country (37%), political (33%), societal or development aid information (both 22%), information on specific projects (20%) or environmental information (18%). In the **Mashrek**, the older the respondent, the more likely they are to look for political information, economic and financial information, or information concerning cooperation with their country.
- In the **Maghreb**, respondents who remained in education longer are generally the most likely to say they look for each type of information. The exception is employment policy information, which is most likely to be looked for by respondents who completed education aged 15 or younger (20%). In the **Mashrek**, on the other hand, respondents who completed education aged 15 or younger are often the most likely to look for each type of information, and this is particularly the case for development aid information (25%), employment policy information (23%) and environmental information (22%). They are, however, the least likely to say they look for economic and financial information or information concerning cooperation with their country.
- In both **Maghreb** and **Mashrek** countries, retired persons are the most likely to say they look for political information (36% each). In the **Maghreb** this group is the most likely to look for societal information (25%). In the **Mashrek** this group is also the most likely to look for economic and financial information (47%) or information concerning cooperation with their country (42%).

The analysis also shows that respondents in the **Maghreb** with relatives living in the EU are more likely to look for visa information (28% vs 23% who don't have relatives in the EU) but less likely to look for information concerning cooperation with their country (23% vs 30%). In the **Mashrek**, those with relatives in the EU are more likely to look for jobs and grant opportunities (23% vs 17%) or employment policy information (20% vs 14%).





In the **Maghreb**, respondents who say relations between the EU and their country are good are more likely to look for information concerning cooperation with their country (28% vs 21% who say relations are bad), but less likely to look for political information (21% vs 26%). In the **Mashrek**, those who say relations between their country and the EU are good are generally more likely to look for each type of information. The most notable exceptions are political information (22% vs 37% who say relations are bad) and information concerning cooperation with their country (30% vs 35%).

Finally, in **Mashrek** countries, respondents who feel well informed about the EU are more likely to look for each kind of information than those who do not feel this way. This pattern also exists in **Maghreb** countries for information concerning cooperation with their country (29% vs 21%), and jobs and grant opportunities (26% vs 20%).

**B6** What type of information on the European Union do you look for? (MULTIPLE ANSWERS POSSIBLE)  
(% - **MAGHREB**)

	Political information	Economical and financial information	Information concerning cooperation with (OUR COUNTRY)	Employment policy information	Cultural information	Societal information	Development aid information	Environmental information	Information on specific projects	Visa information	Jobs and grant opportunities	Don't know
MAGHREB	22	26	26	15	24	17	13	11	12	26	23	7
<b>Gender</b>												
Male	21	29	24	15	21	16	13	10	11	29	24	6
Female	23	23	28	15	29	18	12	13	14	22	22	7
<b>Age</b>												
15-24 years	16	25	23	15	25	16	11	10	11	26	23	6
25-39 years	20	25	23	15	24	16	12	9	10	25	25	6
40-54 years	26	29	28	15	23	16	12	12	14	27	22	8
55 years or more	33	29	37	15	27	22	22	18	20	26	21	8
<b>Education (End of)</b>												
15-	20	23	23	20	16	16	14	11	11	25	29	8
16-19	23	28	21	13	23	21	10	12	8	31	18	6
20 or more	28	26	29	18	32	19	14	12	16	31	26	3
Still studying	20	32	28	16	27	16	15	12	14	24	27	5
<b>Occupation</b>												
Self-employed	22	26	28	13	22	13	11	11	11	26	18	6
Managers	26	24	17	23	37	18	10	10	19	43	19	6
White collars	27	32	18	24	24	14	17	13	12	32	29	4
Manual workers	18	21	25	11	23	19	10	8	11	24	23	6
House persons	23	24	32	11	22	12	7	11	14	17	29	12
Unemployed	21	26	23	15	22	20	13	11	8	26	23	7
Retired	36	31	31	19	20	25	18	16	19	22	15	11
Students	18	28	28	14	29	16	15	12	14	22	26	6
<b>Relatives living in the EU</b>												
Yes	23	27	23	16	23	17	12	10	13	28	25	5
No	20	26	30	13	26	16	13	12	12	23	21	9
<b>Relations between EU and country</b>												
Good	21	26	28	15	25	17	14	12	13	25	24	6
Bad	26	28	21	17	25	18	8	11	12	29	23	6
<b>Informed about the EU</b>												
Well-informed	23	28	29	17	25	17	13	13	14	27	26	4
Not informed	21	24	21	12	24	17	12	9	11	25	20	9

**B6** What type of information on the European Union do you look for? (MULTIPLE ANSWERS POSSIBLE)  
(% - MASHREK)

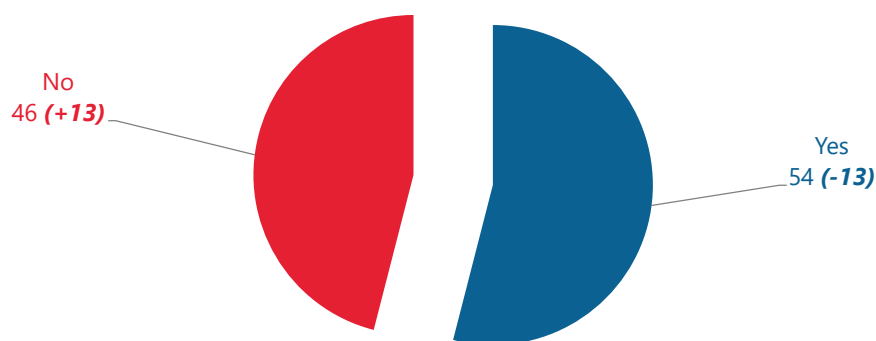
	Political information	Economical and financial information	Information concerning cooperation with (OUR COUNTRY)	Employment policy information	Cultural information	Societal information	Development aid information	Environmental information	Information on specific projects	Visa information	Jobs and grant opportunities	Don't know
MASHREK	26	36	32	16	24	19	15	14	19	16	19	8
 <b>Gender</b>												
Male	30	38	31	17	22	18	15	14	20	17	19	8
Female	22	34	32	15	27	19	14	15	18	15	19	8
 <b>Age</b>												
15-24 years	26	31	25	18	25	20	13	12	18	13	21	8
25-39 years	25	37	28	17	26	18	14	12	17	14	23	5
40-54 years	24	37	35	18	19	19	16	17	21	18	19	11
55 years or more	30	41	40	12	25	18	16	18	22	19	11	12
 <b>Education (End of)</b>												
15-	22	31	26	23	28	24	25	22	22	15	17	5
16-19	28	37	36	16	23	18	14	14	20	16	18	10
20 or more	26	38	31	14	23	17	15	15	21	18	19	8
Still studying	27	32	24	16	30	21	10	10	13	11	22	6
 <b>Occupation</b>												
Self-employed	29	38	30	19	27	17	16	17	23	15	20	7
Managers	21	35	32	15	21	19	16	15	19	21	25	9
White collars	27	37	34	12	25	15	13	14	19	19	16	13
Manual workers	27	42	27	22	18	29	18	18	24	10	21	6
House persons	20	35	30	17	24	22	16	16	20	11	16	5
Unemployed	21	26	25	21	20	19	10	9	18	8	29	8
Retired	36	47	42	9	21	16	19	16	20	22	11	7
Students	29	33	29	18	28	21	12	10	15	14	21	7
<b>Relatives living in the EU</b>												
Yes	27	37	32	20	24	18	16	14	20	18	23	5
No	26	36	31	14	24	19	14	14	19	14	17	10
<b>Relations between EU and country</b>												
Good	22	39	30	18	27	22	17	15	20	16	22	5
Bad	37	31	35	13	18	12	10	12	17	16	15	14
<b>Informed about the EU</b>												
Well-informed	28	38	34	17	26	20	16	17	22	18	20	6
Not informed	23	32	26	14	22	15	11	8	14	10	16	12

## Finding the right information

The majority of respondents who look for information about the EU usually find what they are looking for, although respondents in the Mashrek are much more likely to say this (75% vs 54% in Maghreb).

The proportion of respondents in Maghreb countries who usually find what they are looking for has declined notably since summer 2018 (-13 pp), but the proportion in Mashrek countries has remained relatively stable (-1 pp).

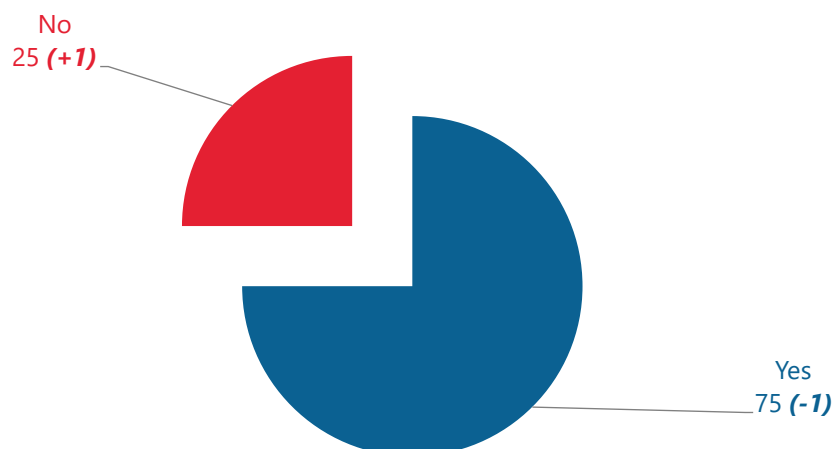
- B7** Do you usually find the information on the European Union you are looking for?  
(% - **MAGHREB**)



(Autumn 2019 - Autumn 2018)

Base: respondents in Maghreb that look for information (N=1347)

- B7** Do you usually find the information on the European Union you are looking for?  
(% - **MASHREK**)

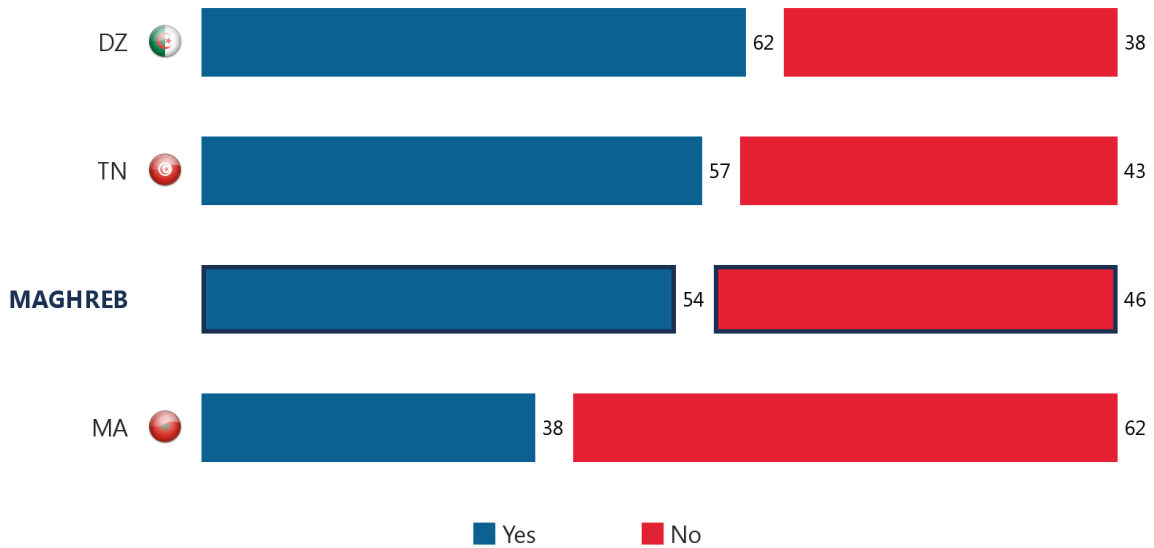


(Autumn 2019 - Autumn 2018)

Base: respondents in Mashrek that look for information (N=2007)

In the Maghreb, respondents in Algeria (62%) and Tunisia (57%) are more likely to say they usually find what they are looking for, compared to respondents in Morocco (38%). In all three countries, the proportions saying this have declined since summer 2018, with the largest decline seen in Algeria (-18 pp).

**B7** Do you usually find the information on the European Union you are looking for?  
(%)



Base: respondents in Maghreb that look for information (N=1347)

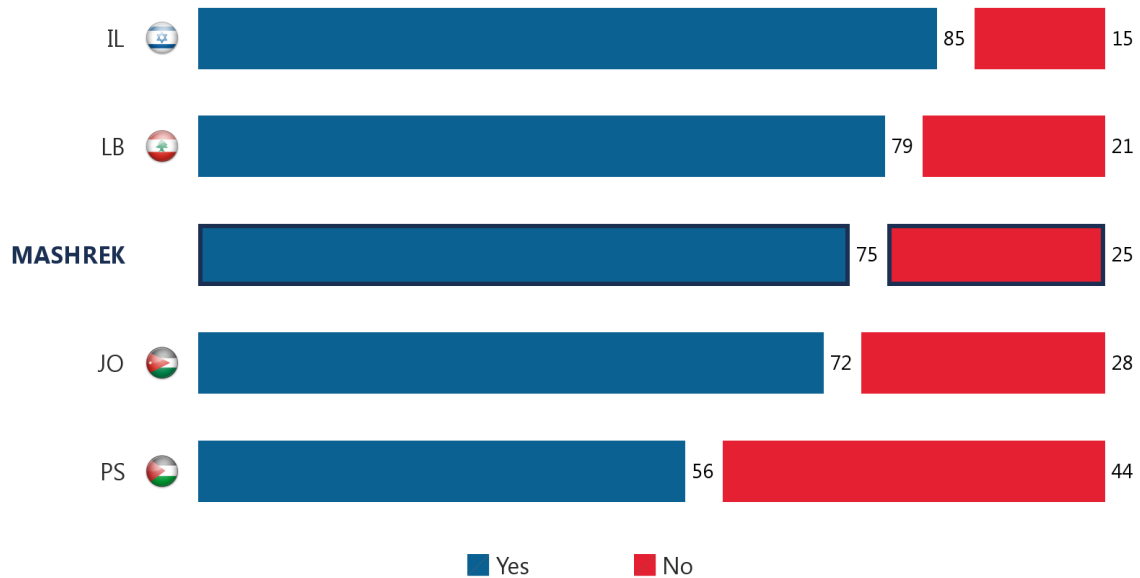
**B7** Do you usually find the information on the European Union you are looking for?  
(%)

	Yes	Aut. 2019 - Aut. 2018	No	Aut. 2019 - Aut. 2018
MAGHREB	54	▼ 13	46	▲ 13
MA	38	▼ 4	62	▲ 4
DZ	62	▼ 18	38	▲ 18
TN	57	▼ 7	43	▲ 7

Base: respondents in Maghreb that look for information (N=1347)

In the Mashrek, respondents in Palestine (56%) are much less likely to say they usually find the information they are looking for, particularly when compared to those in Israel (85%). Respondents in Lebanon are now much more likely to say they usually find the information they are looking for (+11 pp), while those in Palestine are now less likely to say so (-15 pp), compared to Autumn 2018.

**B7** Do you usually find the information on the European Union you are looking for? (%)



Base: respondents in Mashrek that look for information (N=2007)

**B7** Do you usually find the information on the European Union you are looking for? (%)

	Yes	Aut. 2019 - Aut. 2018	No	Aut. 2019 - Aut. 2018
MASHREK	75	▼ 1	25	▲ 1
IL	85	▲ 1	15	▼ 1
JO	72	▼ 2	28	▲ 2
LB	79	▲ 11	21	▼ 11
PS	56	▼ 15	44	▲ 15







Base: respondents in Mashrek that look for information (N=2007)

The socio-demographic analysis reveals the following:







- In **Mashrek** countries, men are more likely to find the information about the EU they are looking for than women (78% vs 72%).
- In **Maghreb** countries, respondents aged 15-39 are the most likely to say they usually find what they are looking for, while in **Mashrek** countries those aged 55 and over are the most likely to say this (79%).
- In both the **Maghreb** and the **Mashrek**, those who completed education aged 16 or older usually find what they are looking for. For example, in the **Maghreb** 57% who completed education aged 20 or older usually find the information about the EU they are looking for, compared to 44% of those who completed education aged 15 or younger.
- In **Maghreb** countries, respondents living in towns are more likely than those in rural villages to find the information they are looking for.
- In both the **Maghreb** and the **Mashrek**, white collar workers are amongst the most likely to find what they are looking for (61% and 83% respectively). In **Maghreb** countries students are the most likely to say they usually find what they are looking for (62%).

The analysis also shows that respondents in the **Maghreb** with relatives living in the EU are much more likely to say they usually find what they are looking for (61% vs 44% who do not have relatives in the EU). In both the **Maghreb** and the **Mashrek**, respondents who have a positive opinion of the EU, or who feel well informed about it are the most likely to find what they are looking for.

**B7** Do you usually find the information on the European Union you are looking for?  
(% - **MAGHREB**)

	Yes	No
MAGHREB	54	46
 Gender		
Male	55	45
Female	53	47
 Age		
15-24 years	55	45
25-39 years	57	43
40-54 years	50	50
55 years or more	50	50
 Education (End of)		
15-	44	56
16-19	58	42
20 or more	57	43
Still studying	61	39
 Subjective urbanisation		
Rural area or village	47	53
Small/mid size town	59	41
Large town	56	44
 Occupation		
Self-employed	54	46
Managers	57	43
White collars	61	39
Manual workers	47	53
House persons	44	56
Unemployed	50	50
Retired	54	46
Students	62	38
<b>Relatives living in the EU</b>		
Yes	61	39
No	44	56
 Opinion of the EU		
Positive	57	43
Neutral	51	49
Negative	51	49

**B7** Do you usually find the information on the European Union you are looking for?  
(% - **MASHREK**)

	Yes	No
MASHREK	75	25
 Gender		
Male	78	22
Female	72	28
 Age		
15-24 years	74	26
25-39 years	74	26
40-54 years	74	26
55 years or more	79	21
 Education (End of)		
15-	65	35
16-19	76	24
20 or more	78	22
Still studying	75	25
 Subjective urbanisation		
Rural area or village	76	24
Small/mid size town	75	25
Large town	75	25
 Occupation		
Self-employed	76	24
Managers	78	22
White collars	83	17
Manual workers	71	29
House persons	62	38
Unemployed	64	36
Retired	82	18
Students	76	24
<b>Relatives living in the EU</b>		
Yes	75	25
No	75	25
 Opinion of the EU		
Positive	79	21
Neutral	72	28
Negative	71	29



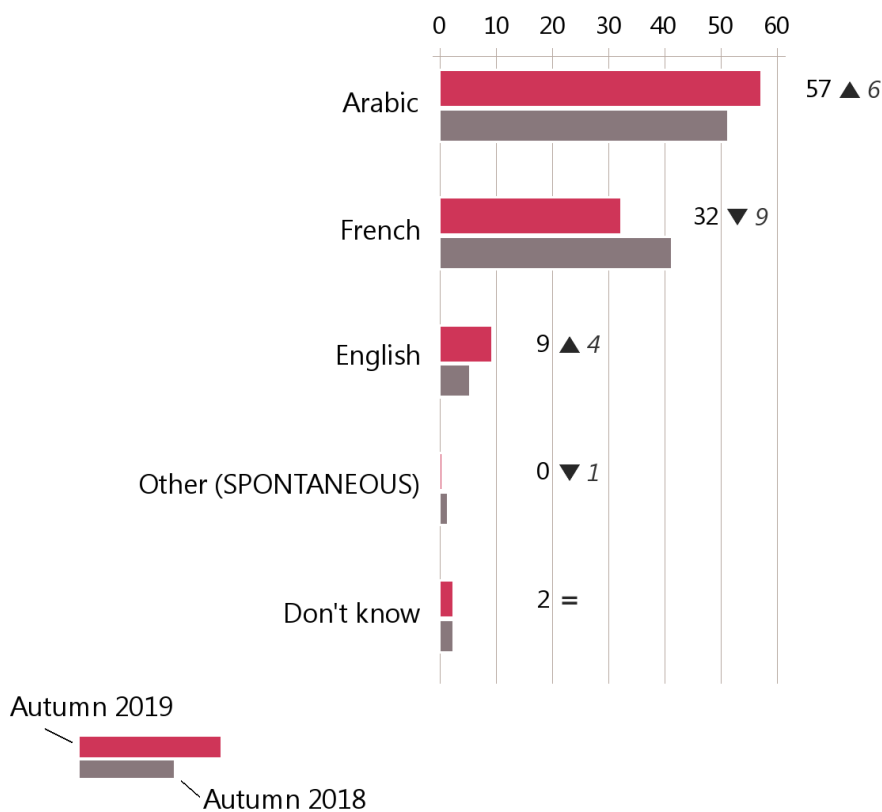
### 3. Media channels and the European Union

#### Languages used for research on the European Union

Respondents that look for information on the EU are most likely to search in Arabic (Maghreb: 57%, Mashrek: 40%)<sup>35</sup>. French is used by almost one third of respondents in the Maghreb (32%). Just over one quarter in the Mashrek search in English (26%) while almost three in ten respondents searches in Hebrew (29%).

Compared to summer 2018, respondents in Maghreb countries are now more likely to search in Arabic (+6 pp) but less likely to search in French (-9 pp). There has been little change in Mashrek countries (1-4 pp).

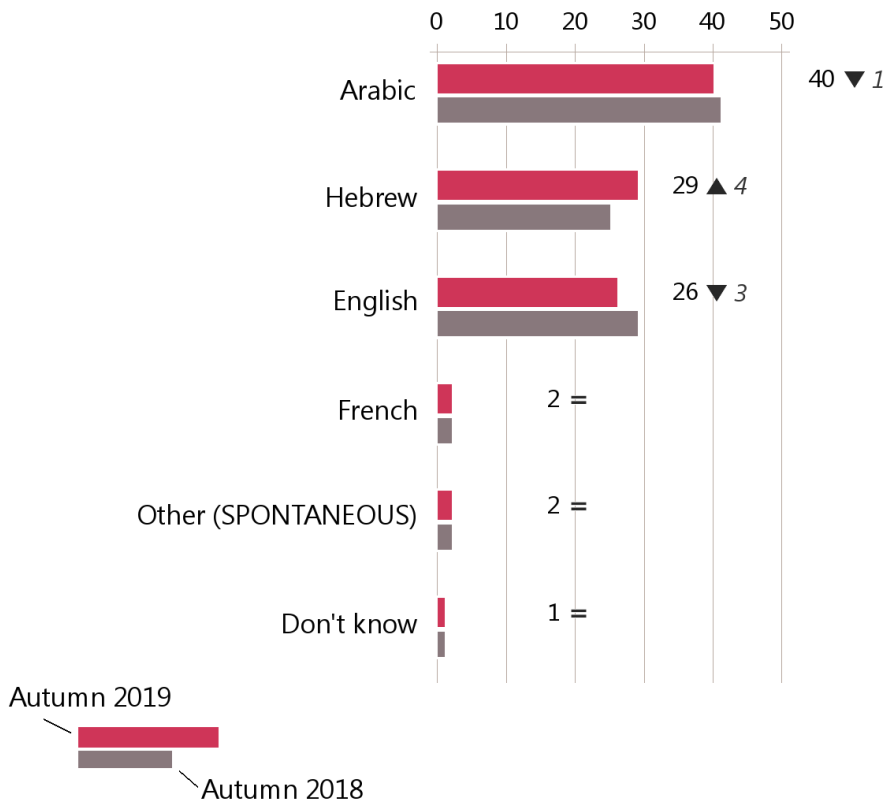
**B8** When searching for information on the European Union, which language do you primarily use?  
(% - MAGHREB)



Base: respondents in Maghreb that look for information (N=1347)

<sup>35</sup> B8. When searching for information on the European Union, which language do you primarily use?

**B8** When searching for information on the European Union, which language do you primarily use?  
 (% - MASHREK)



Base: respondents in Mashrek that look for information (N=2007)

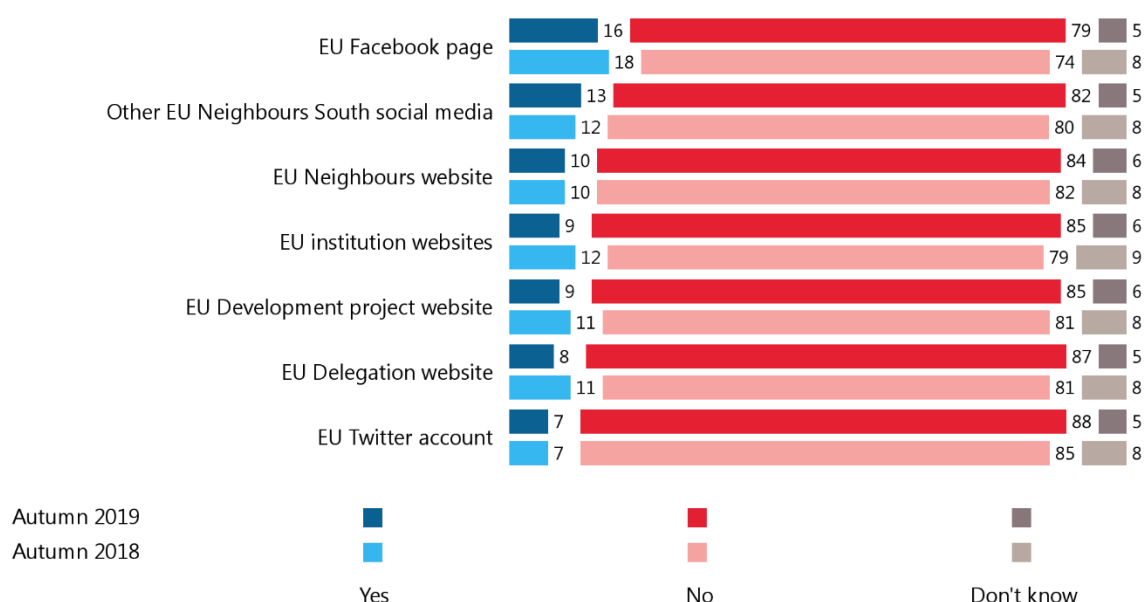
## Use of the European Union’s information resources

Only a small proportion of respondents in either group of countries have visited official EU sites or online accounts<sup>36</sup>. In both Maghreb (16%) and Mashrek (21%) countries, respondents are most likely to have visited the EU Facebook page.

In the Maghreb, the EU Facebook page, other EU Neighbours South social media (13%) and EU Neighbours website (10%) are the only sites/accounts visited by at least one in ten respondents. In the Mashrek, on the other hand, at least one in ten have visited each site/account, with the exception of the EU Twitter account (9%). Furthermore, in each case respondents in the Mashrek are more likely to have visited the site or account than those in the Maghreb, with the largest differences seen for EU institution websites (19% vs 9%), the EU Development project website (15% vs 9%) or the EU Facebook page (21% vs 16%).

The only notable changes since Autumn 2018 is a five-point increase in the proportion of respondents in the Mashrek who have visited other EU Neighbours South social media.

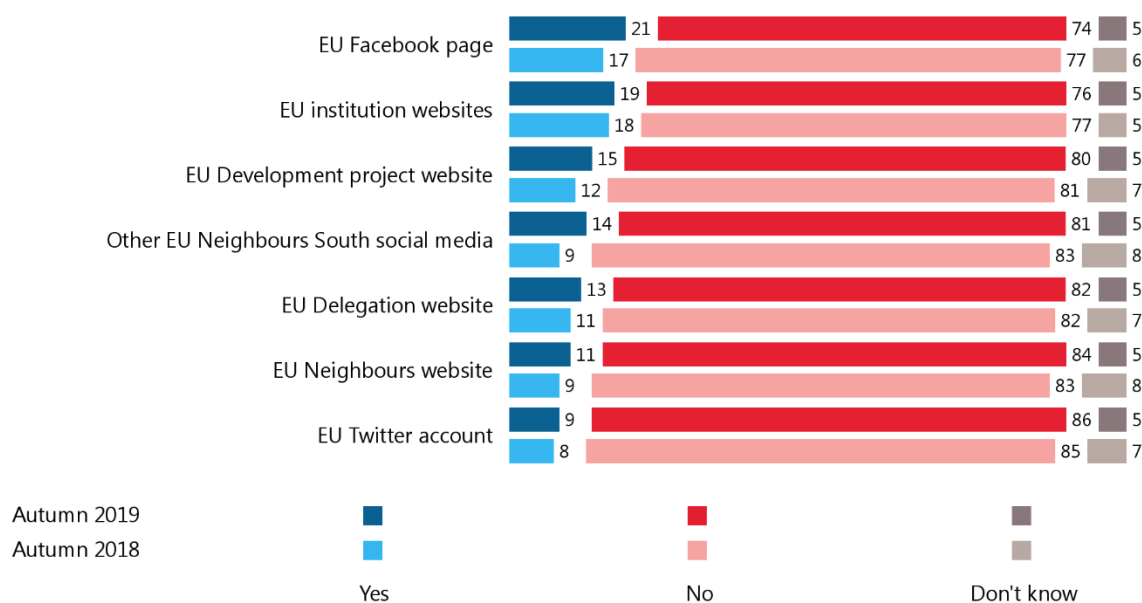
**B9** Have you ever visited or read any of the following?  
(% - MAGHREB)



Base: respondents Maghreb (N=3085)

<sup>36</sup> B9. Have you ever visited/read any of the following? 9.1 EU institutions website; 9.2 EU Delegation; website; 9.3 EU Development projects website; 9.4 EU Neighbourhood Info Centre portal; 9.5 EU; Twitter account; 9.6 EU Facebook Page.

**B9** Have you ever visited or read any of the following?  
(% - MASHREK)



Base: respondents Mashrek (N=4000)

Respondents in each country in the Maghreb are most likely to have visited the EU Facebook page, although proportions vary from 22% in Algeria to 11% in Tunisia. Respondents in Algeria are the most likely to have visited each of these sites or accounts, in particular other EU Neighbours South social media (18%), the EU Neighbours website (15%) or an EU Development project website (12%).

The most notable changes since Autumn 2018 are seven-point declines in the proportions of respondents in Tunisia that have visited the EU Facebook page or EU Neighbours website, and six-point declines in the proportions visiting an EU Development project website or the EU Delegation website.

**B9** Have you ever visited or read any of the following?  
(% - YES)





	EU Facebook page	Aut. 2019 - Aut. 2018	Other EU Neighbours South social media	Aut. 2019 - Aut. 2018	EU Neighbours website	Aut. 2019 - Aut. 2018	EU institution websites	Aut. 2019 - Aut. 2018	EU Development project website	Aut. 2019 - Aut. 2018	EU Delegation website	Aut. 2019 - Aut. 2018	EU Twitter account	Aut. 2019 - Aut. 2018
MAGHREB	16	▼ 2	13	▲ 1	10	=	9	▼ 3	9	▼ 2	8	▼ 3	7	=
MA	12	=	7	▼ 2	7	▼ 1	8	=	7	=	6	=	5	▼ 2
DZ	22	=	18	▲ 4	15	▲ 3	11	▼ 5	12	▼ 1	10	▼ 5	8	▲ 1
TN	11	▼ 7	6	▼ 5	4	▼ 7	8	▼ 4	6	▼ 6	6	▼ 6	4	▼ 5

Base: respondents Maghreb (N=3085)

In Mashrek countries, respondents in Palestine (41%) are most likely to have visited the EU Facebook page, and they are much more likely to have done this than those in other countries. The most visited sites in Lebanon are the EU Facebook page and the EU institution website (both 21%). In Jordan the most visited site is also the EU Facebook page (14%). In Israel respondents are slightly more likely to say they have visited the EU institution website (17%) than the EU Facebook page (16%).

Respondents in Lebanon are now more likely to have visited each of these sites and accounts than they were in Autumn 2018, with the largest increases seen for the EU Facebook page (+16 pp) and the EU institution websites (+14 pp). In all four countries respondents are now more likely to have visited an EU Development project website or another EU Neighbours South social media account.

**B9** Have you ever visited or read any of the following?  
(% - YES)

	EU Facebook page Aut. 2019 - Aut. 2018	EU institution websites Aut. 2019 - Aut. 2018	EU Development project website Aut. 2019 - Aut. 2018	Other EU Neighbours South social media Aut. 2019 - Aut. 2018	EU Delegation website Aut. 2019 - Aut. 2018	EU Neighbours website Aut. 2019 - Aut. 2018	EU Twitter account Aut. 2019 - Aut. 2018
MASHREK	21 ▲ 4	19 ▲ 1	15 ▲ 3	14 ▲ 5	13 ▲ 2	11 ▲ 2	9 ▲ 1
IL 	16 ▲ 3	17 =	10 ▲ 3	9 ▲ 1	12 =	9 ▲ 1	6 ▲ 1
JO 	14 ▲ 6	9 ▲ 1	8 ▲ 2	11 ▲ 7	7 ▲ 2	4 =	3 ▲ 1
LB 	21 ▲ 16	21 ▲ 14	14 ▲ 9	13 ▲ 11	15 ▲ 10	10 ▲ 5	9 ▲ 7
PS 	41 ▼ 3	38 ▼ 2	37 ▲ 5	30 ▲ 6	25 ▲ 1	26 ▲ 6	25 ▼ 1

Base: respondents Mashrek (N=4000)

The socio-demographic analysis shows:





- In **Maghreb** countries, men are more likely to have visited the EU institution website (12% vs 7% of women), the EU Facebook page (21% vs 12%) or other EU Neighbours South social media (16% vs 9%).
- In both **Maghreb** and **Mashrek** countries, respondents aged 15-54 are more likely to have visited the EU Facebook page or other EU Neighbours South social media. In the **Mashrek** the same pattern also applies for the EU Neighbours website.
- In the **Mashrek**, the longer a respondent remained in education, the more likely they are to have visited each site/account. In the **Maghreb** the pattern applies for the EU institution website, the EU Neighbours website, the EU Facebook page and other EU Neighbours South social media accounts. For example, 17% of respondents in Maghreb countries who finished education aged 20 or older have

visited other EU Neighbours South social media accounts, compared to 9% who completed education aged 15 or younger.





- In **Mashrek** countries, managers and the self-employed are the occupation groups most likely to have visited the EU institution website or the EU Facebook page.

In both the **Maghreb** and the **Mashrek**, respondents who have relatives living in the EU or those who feel well-informed about the EU are more likely to have visited each of these sites or accounts. For example, in Maghreb countries 30% of those with relatives living in the EU have visited the EU Facebook page, compared to 18% who do not have relatives in the EU.

**B9** Have you ever visited or read any of the following?  
(% - **MAGHREB**)

	EU institutions website	EU Delegation website	EU development project website	EU neighbours website	EU twitter account	EU Facebook page	Other EU Neighbours South social
	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>MAGHREB</b>	9	8	9	10	7	16	13
 <b>Gender</b>							
Male	12	10	10	12	8	21	16
Female	7	6	8	9	5	12	9
 <b>Age</b>							
15-24	9	9	11	12	7	21	15
25-39	13	9	10	13	7	18	14
40-54	8	8	8	10	7	14	13
55 years	5	4	5	5	3	7	6
 <b>Education (End of)</b>							
15-	7	6	7	7	5	11	9
16-19	10	11	11	11	8	18	13
20 or more	12	10	10	14	8	22	17
Still studying	11	9	12	13	7	22	15
 <b>Occupation</b>							
Self-employed	13	11	10	12	9	22	16
Managers	14	13	17	17	14	22	18
White collars	14	10	13	15	9	23	18
Manual workers	7	7	6	6	5	13	9
House persons	4	3	3	5	3	7	5
Unemployed	9	8	10	12	6	15	13
Retired	7	7	9	11	3	10	9
Students	11	9	11	12	7	20	15
<b>Relatives living in the EU</b>							
Yes	13	11	12	14	9	22	17
No	6	5	6	7	4	11	8
<b>Informed about the EU</b>							
Well-informed	15	12	13	15	10	23	17
Not informed	5	5	6	7	4	12	9

**B9** Have you ever visited or read any of the following?  
(% - MASHREK)

	EU institutions website	EU Delegation website	EU development project website	EU neighbours website	EU twitter account	EU Facebook page	Other EU Neighbours South social media
	Yes	Yes	Yes	Yes	Yes	Yes	Yes
MASHREK	19	13	15	11	9	21	14
 Gender							
Male	21	14	16	12	10	21	15
Female	18	13	14	10	8	20	13
 Age							
15-24 years	20	13	14	10	10	22	14
25-39 years	22	14	18	12	11	24	16
40-54 years	18	13	15	12	9	21	14
55 years or more	16	13	11	9	5	16	9
 Education (End of)							
15-	10	8	11	7	7	13	9
16-19	15	12	13	9	7	19	13
20 or more	26	18	20	15	12	26	17
Still studying	22	13	13	8	11	21	14
 Occupation							
Self-employed	25	19	19	15	14	29	20
Managers	25	18	22	17	12	24	16
White collars	17	13	12	9	7	19	12
Manual workers	18	13	18	13	8	19	15
House persons	18	12	16	11	10	18	14
Unemployed	15	10	16	9	6	18	14
Retired	16	11	8	5	4	19	8
Students	20	13	13	8	10	20	14
<b>Relatives living in the EU</b>							
Yes	28	23	23	18	16	30	21
No	16	10	12	8	7	18	11
<b>Informed about the EU</b>							
Well-informed	27	18	20	14	12	28	18
Not informed	11	8	9	7	6	14	10

## Coverage of the European Union in national media

Respondents were asked their opinion about national media coverage of the EU<sup>37</sup>. In Mashrek countries respondents most often say each media type talks about the right amount about the EU. In Maghreb countries, on the other hand, opinion is more divided. In fact, respondents most often say websites talk too much about the EU, while the radio talks too little about it.

Just over three in ten respondents in the Maghreb think national **television** talks enough about the EU (31%), but the same proportion (30%) say it talks too much about the EU while 30% say it talks too little about it. In contrast, 48% in the Mashrek think national television talks enough about the EU, while 14% think it talks too much about it and 24% say it does not talk enough about the EU.

When it comes to the **radio**, respondents in the Mashrek are more likely than those in the Maghreb to say it talks the right amount about the EU (39% vs 31%). In fact, respondents in Maghreb countries are more likely to say radio talks too little about the EU (39%), compared to 31% in Mashrek countries who say the same. More than one in ten (14%) in the Maghreb say the radio talks too much about the EU, compared to 9% in the Mashrek who think the same way.

In Mashrek countries, respondents most often say the **printed press** talks enough about the EU (41%), while 28% say it talks too little about it and 9% that it talks too much about it. Opinion in the Maghreb is more divided, with 32% saying the printed press talks about the right amount about the EU, and 31% saying it talks too little about it. Almost one in five (19%) say the printed press talks too much about the EU.

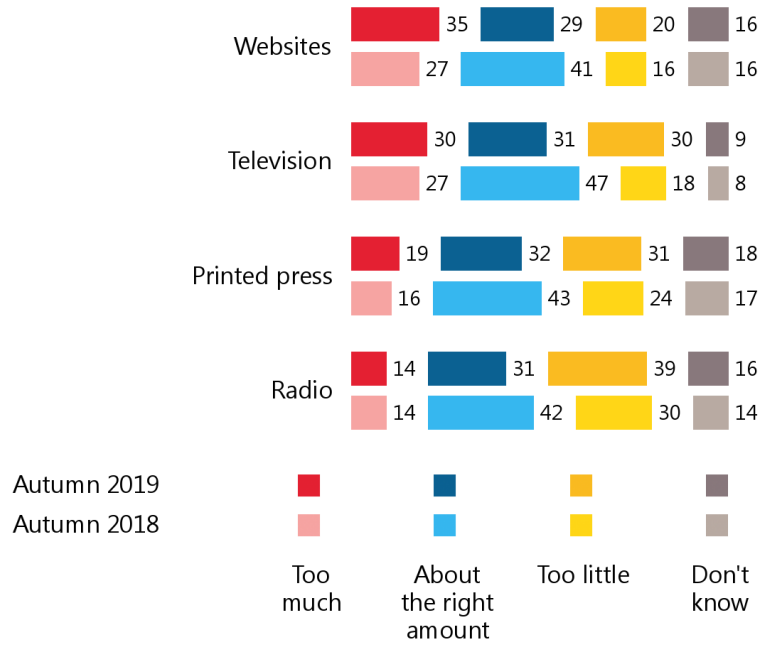
In the Maghreb, respondents most often say national **websites** talk too much about the EU (35%) – this compares to 19% in Mashrek countries who think the same way. In the Mashrek the most common answer is that national websites talk the right amount about the EU (45%), while 29% in the Maghreb think the same. In each group of countries about one in five respondents say websites talk too little about the EU (Maghreb: 20%, Mashrek: 18%).

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<sup>37</sup> B10. Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union? 10.1 Television; 10.2 Radio; 10.3 Printed press; 10.4 Websites.

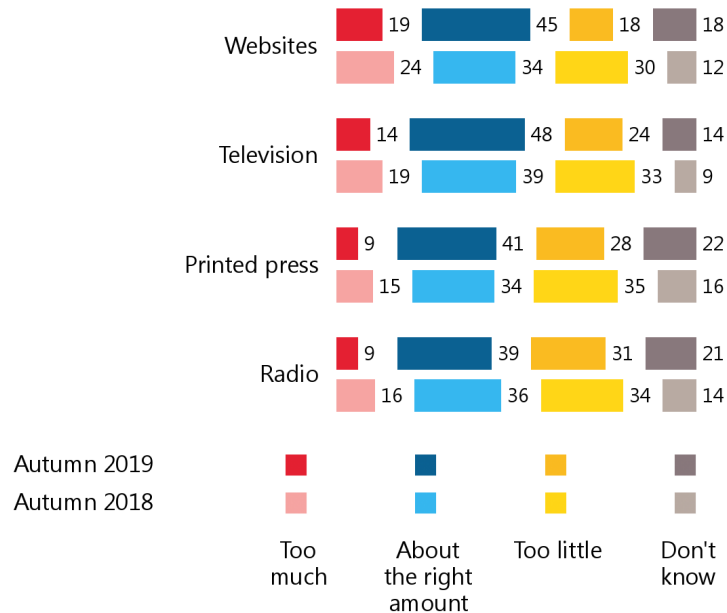


**B10** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?  
 (% - **MAGHREB**)



Base: respondents Maghreb (N=3085)

**B10** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?  
 (% - **MASHREK**)



Base: respondents Mashrek (N=4000)




## Television

Respondents in Morocco are most likely to think national television talks about the right amount (43%) about the EU, but almost as many (42%) think national TV talks too much about it. In Algeria respondents are most likely to say national TV talks too little about the EU (47%) while in Tunisia respondents most often say it talks the right amount (31%) about the EU.

In the Maghreb overall, respondents are now much less likely to say national television talks the right amount about the EU (-16 pp) and are much more likely to say it talks too little about it (+12 pp). This pattern also occurs in Algeria, while in Tunisia respondents are now less likely to say national TV talks about the right amount about the EU (-10 pp).

**B10.1** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?

### Television (%)

	Too much	Aut. 2019 - Aut. 2018	About the right amount	Aut. 2019 - Aut. 2018	Too little	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	30	▲ 3	31	▼16	30	▲12	9	▲ 1
MA 	42	▼ 1	43	▼ 4	8	▲ 1	7	▲ 4
DZ 	26	▲ 9	22	▼27	47	▲24	5	▼ 6
TN 	19	▼ 3	31	▼10	26	▲ 2	24	▲11





Base: respondents Maghreb (N=3085)

In each Mashrek country, respondents most often say national television talks about the right amount about the EU, and in every country except Israel (40%) the majority think this way. Respondents in Palestine (29%) are much more likely than those in other countries to say national TV talks too much about the EU.

Across the Mashrek as a whole, respondents are now less likely to say that national TV talks too little (-9 pp) or too much (-5 pp) about the EU and are more likely to say they talk about the right amount. This pattern is repeated in Lebanon. In all four countries respondents are now most likely to say national TV talks the right amount about the EU, with the largest increase seen in Jordan (+16 pp). In all four countries there has also been a decline in the proportion who say national TV talks too little about the EU, with the largest decline seen in Israel (-15 pp).

**B10.1** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?

**Television (%)**

	Too much	Aut. 2019 - Aut. 2018	About the right amount	Aut. 2019 - Aut. 2018	Too little	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	14	▼ 5	48	▲ 9	24	▼ 9	14	▲ 5
IL 	12	▼17	40	▲14	21	▼15	27	▲18
JO 	8	=	51	▲16	33	▼12	8	▼ 4
LB 	15	▼ 4	59	▲10	21	▼ 6	5	=
PS 	29	▲ 9	51	▼ 3	15	▼ 3	5	▼ 3

*Base: respondents Mashrek (N=4000)*




## Radio

In Morocco (51%) respondents most often say national radio talks the right amount about the EU. In Algeria and Tunisia, on the other hand, respondents most often say national radio talks too little about it (53% and 31% respectively). Compared to the other two countries, opinion in Tunisia is more divided, with almost as many (29%) saying national radio talks about the right amount about the EU.

Compared to Autumn 2018, respondents in Maghreb overall are now less likely to say national radio talks about the right amount (-11 pp) about the EU, and more likely to say it talks too little about it (+9 pp). At a country level the largest changes are in Algeria, with an 18-point decline in the proportion who say national radio talks about the right amount about the EU, and a 16-point increase in the proportion who say it talks too little about it.

**B10.2** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?

### Radio (%)

	Too much	Aut. 2019 - Aut. 2018	About the right amount	Aut. 2019 - Aut. 2018	Too little	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	14	=	31	▼11	39	▲9	16	▲2
MA 	16	▼3	51	▼3	23	▲4	10	▲2
DZ 	13	▲4	17	▼18	53	▲16	17	▼2
TN 	12	▼1	29	▼6	31	▼5	28	▲12





Base: respondents Maghreb (N=3085)

Respondents in Israel (36%), Lebanon (42%) and Palestine (51%) most often say national radio talks about the right amount about the EU. In Jordan, on the other hand, the most common answer is that it talks too little about the EU (43%). Compared to other countries, respondents in Palestine are much more likely to say national radio talks too much about the EU.

In Mashrek as a whole, respondents are now less likely to say national radio talks too much about the EU (-7 pp) than they were in Autumn 2018. At a country level, respondents in Israel are now much less likely to say this (-28 pp), while those in Palestine are now more likely to do so (+10 pp). Respondents in Jordan (+12 pp) and Israel (+6 pp) are now more likely to say national radio talks the right amount about the EU.

**B10.2** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?

**Radio (%)**

	Too much	Aut. 2019 - Aut. 2018	About the right amount	Aut. 2019 - Aut. 2018	Too little	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	9	▼ 7	39	▲ 3	31	▼ 3	21	▲ 7
IL 	8	▼28	36	▲ 6	25	▼ 4	31	▲26
JO 	4	▲ 2	36	▲12	43	▼ 5	17	▼ 9
LB 	6	=	42	▼ 4	34	▲ 1	18	▲ 3
PS 	21	▲10	51	▼ 5	22	▼ 1	6	▼ 4

*Base: respondents Mashrek (N=4000)*




### Printed press

In Morocco (45%) and Tunisia (31%) respondents are most likely to say the national printed press talks the right amount about the EU, while in Algeria respondents most often say it talks too little about the EU (41%).

At an overall Maghreb level, respondents are now less likely to say that national printed press talks the right amount about the EU (-11 pp) and more likely to say it talks too little about the EU (+7 pp). At a country level the largest changes are in Algeria, where opinion has become more polarised: there have been increases in the proportion of respondents who think the national printed press talks too much (+8 pp) or too little (+14 pp) about the EU, and a large decline in the proportion who say it talks about the right amount (-21 pp).

**B10.3** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?

#### Printed press (%)

	Too much	Aut. 2019 - Aut. 2018	About the right amount	Aut. 2019 - Aut. 2018	Too little	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	19	▲ 3	32	▼11	31	▲ 7	18	▲ 1
MA 	18	▼ 3	45	▼ 1	22	▲ 3	15	▲ 1
DZ 	21	▲ 8	23	▼21	41	▲14	15	▼ 1
TN 	13	▼ 1	31	=	23	▼ 7	33	▲ 8





Base: respondents Maghreb (N=3085)

In every country except Jordan, respondents in the Mashrek most often say the national printed press talks the right amount about the EU. In Jordan respondents most often say it talks too little about it (40%). Respondents in Palestine (18%) are more likely than those in other countries to say the national printed press talks too much about the EU.

At an overall Mashrek level, the proportion who say the national printed press talks too much (-6 pp) or too little (-7 pp) about the EU has declined, while the proportion who think it talks the right amount about it has increased (+7 pp). At a country level the largest changes in opinion are seen in Israel with declines in the proportion who say the national printed press talk too much (-21 pp) or too little (-14 pp) about the EU, and an increase in the proportion who say it talks about the right amount (+13 pp).

**B10.3** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?

**Printed press (%)**

	Too much	Aut. 2019 - Aut. 2018	About the right amount	Aut. 2019 - Aut. 2018	Too little	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	9	▼ 6	41	▲ 7	28	▼ 7	22	▲ 6
IL 	10	▼21	39	▲13	22	▼14	29	▲22
JO 	5	=	37	▲10	40	=	18	▼10
LB 	5	▼ 1	42	▼ 2	30	▼ 5	23	▲ 8
PS 	18	▲ 6	49	▲ 1	23	▼ 4	10	▼ 3

*Base: respondents Mashrek (N=4000)*




## Websites

In Morocco (41%) and Tunisia (30%) respondents are most likely to think national websites talk the right amount about the EU. In Algeria on the other hand, respondents most often say websites talk too much about the EU (44%).

In Maghreb overall, respondents are now more likely to say national websites talk too much (+8 pp) about the EU, and less likely to say they talk the right amount (-12 pp) about it compared to Autumn 2018. At a country level, respondents in Algeria are now much more likely to say national websites talk too much about the EU (+19 pp) and much less likely to say they talk about the right amount about the EU (-23 pp).

- B10.4** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?

### Websites (%)

	Too much	Aut. 2019 - Aut. 2018	About the right amount	Aut. 2019 - Aut. 2018	Too little	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	35	▲ 8	29	▼ 12	20	▲ 4	16	=
MA 	30	▼ 2	41	▼ 2	16	▲ 5	13	▼ 1
DZ 	44	▲ 19	19	▼ 23	23	▲ 4	14	=
TN 	19	▼ 4	30	▼ 4	17	▼ 2	34	▲ 10

Base: respondents Maghreb (N=3085)



In all four Mashrek countries, the most common answer is that national websites talk about the right amount about the EU, with proportions ranging from 49% in Lebanon to 42% in Jordan. Respondents in Palestine (35%) are much more likely than those in other countries to say national websites talk too much about the EU.

In the Mashrek overall, respondents are now less likely to say national websites talk too much (-5 pp) or too little (-12 pp) about the EU, and more likely to say they talk about the right amount about the EU (+11 pp). This pattern also occurs in Israel, with even larger differences. Respondents in Palestine are now more likely to say national websites talk too much about the EU (+10 pp), while respondents in Jordan are now less likely to say national websites talk too little about the EU (-9 pp) and more likely to say they talk the right amount about it (+8 pp).

**B10.4** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?

**Websites (%)**

	Too much	Aut. 2019 - Aut. 2018	About the right amount	Aut. 2019 - Aut. 2018	Too little	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	19	▼ 5	45	▲ 11	18	▼ 12	18	▲ 6
IL 	10	▼ 21	44	▲ 24	16	▼ 24	30	▲ 21
JO 	25	▲ 5	42	▲ 8	21	▼ 9	12	▼ 4
LB 	17	▲ 1	49	▲ 1	21	▼ 6	13	▲ 4
PS 	35	▲ 10	43	=	14	▼ 3	8	▼ 7

*Base: respondents Mashrek (N=4000)*

Highlights from the socio-demographic analysis include:

- Men in the **Maghreb** are more likely than women to say national TV (33% vs 28%), radio (17% vs 11%) or print (23% vs 15%) talk too much about the EU.
- In **Maghreb** countries, respondents aged 15-24 (44%) are the most likely to say national websites talk too much about the EU, particularly compared to those aged 55 and over (23%). There are no notable age differences in Mashrek countries.
- In the **Maghreb**, the longer a respondent remained in education, the more likely they are to say each media type talks too little about the EU. For example, 44% of those who completed education aged 20 or older say national TV talks too little about the EU, compared to 24% who completed education aged 15 or younger. In

the **Mashrek**, respondents who completed education aged 15 or younger are the most likely to say national TV talks the right amount about the EU (56%).

- In **Maghreb** countries, managers are the most likely to say national TV (47%), radio (55%) and print media (44%) talk too little about the EU, but they are the most likely to say national websites talk too much about it (47%). There are no consistent patterns in Mashrek countries.

The analysis also shows that in the **Maghreb**, respondents with relatives living in the EU are more likely to say national TV (35%), radio (42%) and print media (35%) talk too little about the EU, compared to those who do not have relatives in the EU. They are, however, more likely than those without relatives in the EU to say national websites talk too much about the EU (38% vs 33%). In **Mashrek** countries, on the other hand, respondents with relatives living in the EU are more likely to say each media type talks too much about the EU than those who don't have relatives in the EU.

In **Mashrek** countries, respondents who have a positive opinion of the EU, or those who feel well informed about the EU are more likely to say there is the right amount of talk about the EU in each type of media. There is no such relationship in the Maghreb. However, in both **Maghreb** and **Mashrek** countries, respondents who think relations between their country and the EU are good are more likely to say there is the right amount of talk about the EU on each media type, although the differences in the Mashrek are smaller.

**B10** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?  
(% - **MAGHREB**)

	Television			Radio			Printed press			Websites		
	Too much	About the right amount	Too little	Too much	About the right amount	Too little	Too much	About the right amount	Too little	Too much	About the right amount	Too little
<b>MAGHREB</b>	30	31	30	14	31	39	19	32	31	35	29	20
<b>Gender</b>												
Male	33	31	28	17	32	37	23	32	32	37	30	20
Female	28	31	31	11	30	40	15	32	31	34	27	19
<b>Age</b>												
15-24	30	34	30	12	33	41	20	37	30	44	32	17
25-39	32	30	31	13	32	40	19	32	34	36	31	22
40-54	31	30	29	17	31	37	20	30	32	34	28	20
55 years	28	30	27	15	26	35	15	29	27	23	21	17
<b>Education (End of)</b>												
15-	37	30	24	19	32	35	22	29	27	32	26	18
16-19	34	27	33	19	26	41	24	30	32	45	26	18
20 or more	20	30	44	8	25	51	14	28	43	36	28	26
Still studying	26	37	31	10	35	42	18	40	31	41	35	17
<b>Occupation</b>												
Self-employed	34	28	31	15	34	39	23	27	35	40	25	25
Managers	25	24	47	10	21	55	18	32	44	47	29	18
White collars	26	31	34	15	29	39	20	33	32	37	28	23
Manual workers	34	31	23	16	33	34	21	28	28	31	30	18
House persons	34	35	18	14	39	27	17	36	22	26	32	17
Unemployed	30	28	33	16	23	44	19	27	36	36	25	19
Retired	30	23	39	13	26	42	12	30	33	26	22	21
Students	27	39	29	11	36	40	18	42	29	40	36	17
<b>Relatives living in the EU</b>												
Yes	30	30	35	14	30	42	20	32	35	38	30	20
No	32	32	24	15	33	34	18	32	28	33	28	18
<b>Opinion of the EU</b>												
Positive	37	34	24	17	38	33	23	37	27	40	33	16
Neutral	27	30	35	12	28	44	16	32	35	35	27	23
Negative	24	29	41	14	23	49	18	26	41	34	24	26
<b>Relations between EU and country</b>												
Good	35	33	26	16	37	34	20	37	29	37	32	18
Bad	26	26	43	12	22	51	20	25	42	40	23	25
<b>Informed about the EU</b>												
Well-informed	35	32	28	15	36	38	21	38	30	40	32	19
Not informed	28	30	32	13	28	40	18	28	33	32	26	21

**B10** Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the European Union?  
 (% - MASHREK)

	Television			Radio			Printed press			Websites		
	Too much	About the right amount	Too little	Too much	About the right amount	Too little	Too much	About the right amount	Too little	Too much	About the right amount	Too little
MASHREK	14	48	24	9	39	31	9	41	28	19	45	18
Gender												
Male	15	49	24	9	42	31	11	42	28	21	46	17
Female	13	48	23	9	37	31	8	40	28	18	42	19
Age												
15-24 years	15	48	22	8	40	31	8	42	28	23	45	16
25-39 years	17	46	22	9	38	32	11	37	30	23	43	18
40-54 years	13	50	24	10	39	32	10	43	28	19	45	19
55 years or more	12	50	25	7	44	28	7	42	27	10	45	19
Education (End of)												
15-	15	56	22	9	44	29	10	39	27	22	40	18
16-19	13	47	24	7	39	30	9	41	26	16	45	19
20 or more	15	48	24	10	41	32	10	43	29	20	47	18
Still studying	15	46	23	8	35	34	8	40	29	24	43	15
Occupation												
Self-employed	20	48	22	10	44	30	11	45	27	26	44	16
Managers	15	45	25	11	40	31	11	43	27	19	47	18
White collars	12	45	23	7	37	29	9	40	26	14	45	18
Manual workers	14	48	26	10	39	34	11	35	30	26	42	15
House persons	14	56	21	10	43	30	9	41	29	19	45	19
Unemployed	15	50	26	9	40	31	7	38	31	26	41	20
Retired	12	46	28	7	39	35	8	43	30	10	46	21
Students	14	46	22	9	36	31	8	40	29	21	45	16
<b>Relatives living in the EU</b>												
Yes	19	49	23	13	40	32	12	42	29	24	48	17
No	12	48	24	7	40	31	8	41	28	18	44	18
Opinion of the EU												
Positive	15	54	24	9	44	33	10	44	30	22	50	17
Neutral	12	45	23	8	36	30	8	38	27	17	39	19
Negative	17	42	24	13	37	28	12	40	27	17	45	18
<b>Relations between EU and country</b>												
Good	14	54	24	8	43	33	8	44	30	22	48	17
Bad	18	42	22	13	39	27	14	41	25	17	44	20
<b>Informed about the EU</b>												
Well-informed	16	54	22	11	46	30	11	48	26	21	52	16
Not informed	13	42	26	7	34	32	8	34	30	18	37	20

## Image of the European Union in national media

Respondents in Maghreb and Mashrek countries most often say the EU has a positive image in various national media<sup>38</sup>.

More than half in Maghreb (59%) and Mashrek (54%) countries say the EU's image in **national TV** is positive, while around one quarter think it is neutral (23%, Mashrek: 25%). Almost one in ten in each group of countries say the EU's image on TV is negative (both 9%).

There is very little difference between respondents in Maghreb and Mashrek countries when it comes to the **national radio**. In both groups of countries, 41% say the EU has a positive image on the radio, and around three in ten say it is neutral (Maghreb: 30%, Mashrek: 29%). Around one in ten think the image is negative (Maghreb: 11%, Mashrek: 10%).

Respondents in the Maghreb (42%) are slightly more likely than those in the Mashrek (38%) to say the EU has a positive image in the **national printed press**. However, there is little difference in the proportions who say the image is neutral (both 29%) or negative (Maghreb: 11%, Mashrek: 13%).

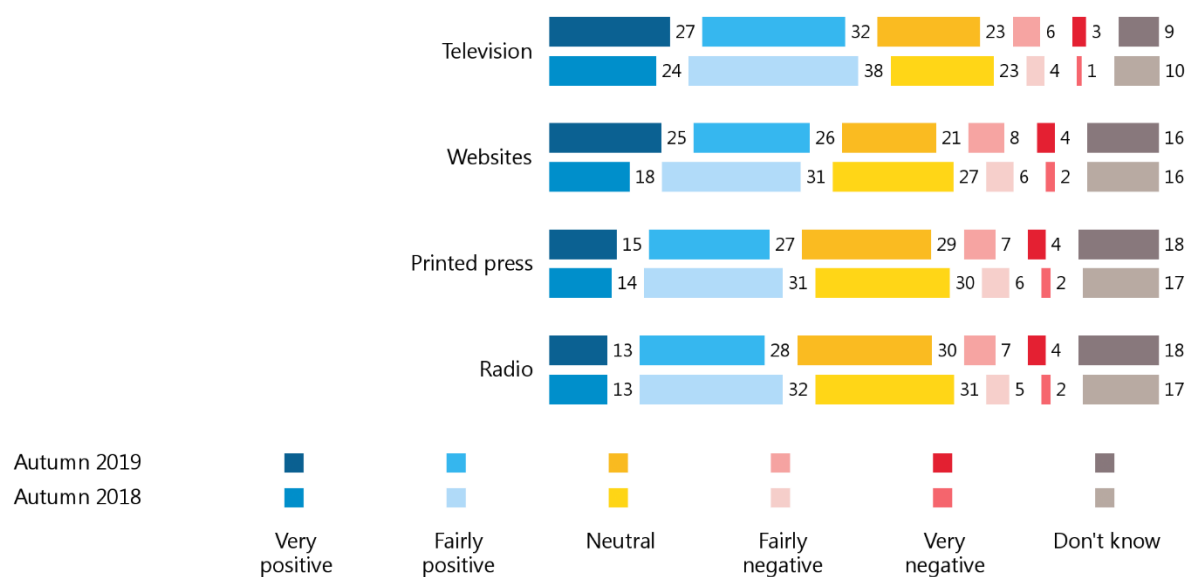
There is also relatively little difference when it comes to **national websites**. In Maghreb countries 51% say they have a positive image of the EU, 21% say it is neutral and 12% that it is negative. In Mashrek countries 49% say the EU image on websites is positive, 24% that it is neutral and 11% that it is negative.

Compared to Autumn 2018 there has been little change in opinion in the Maghreb (between 1 and 4 pp). In the Mashrek, on the other hand, respondents are now more likely to say the EU has a positive image on national websites (+8 pp), television (+7 pp) or radio (+6 pp).

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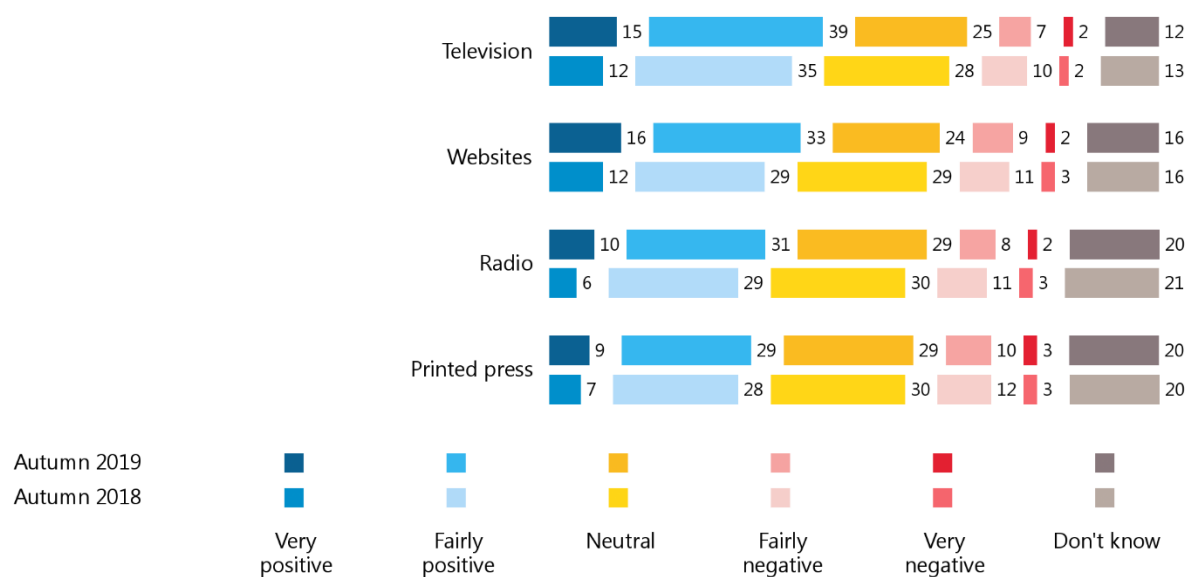
<sup>38</sup> B11. Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative? 11.1 Television; 11.2 Radio; 11.3 Printed press; 11.4 Websites

**B11** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?  
 (% - **MAGHREB**)



Base: respondents Maghreb (N=3085)

**B11** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?  
 (% - **MASHREK**)



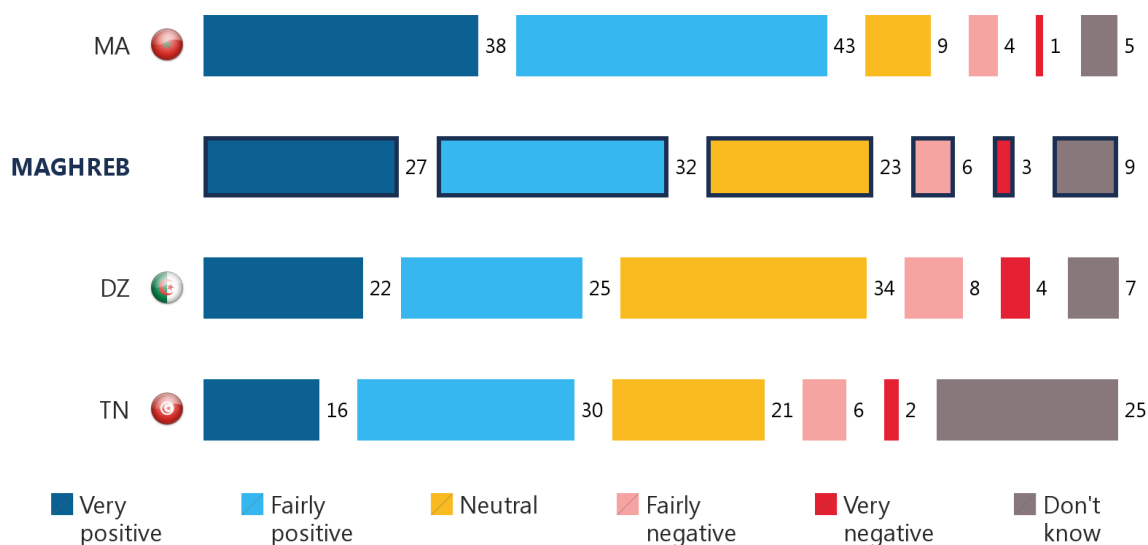
Base: respondents Mashrek (N=4000)

Respondents in Morocco (81%) are much more likely to say the EU's image on national television is positive, compared to those in Algeria (47%) and Tunisia (46%).

Algeria is the only country where at least one in ten respondents say national television portrays the EU in a negative light (12%). In fact, this result in Algeria represents a six-point increase since Autumn 2018 and is accompanied by a five-point decline in the proportion who say the EU's image on national television is positive.

**B11.1** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Television (%)**



Base: respondents Maghreb (N=3085)

**B11.1** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Television (%)**

	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	59	▼ 3	23	=	9	▲ 4	9	▼ 1
TN	46	=	21	▼ 4	8	▼ 5	25	▲ 9
MA	81	▼ 2	9	▼ 1	5	▲ 3	5	=
DZ	47	▼ 5	34	▲ 3	12	▲ 6	7	▼ 4

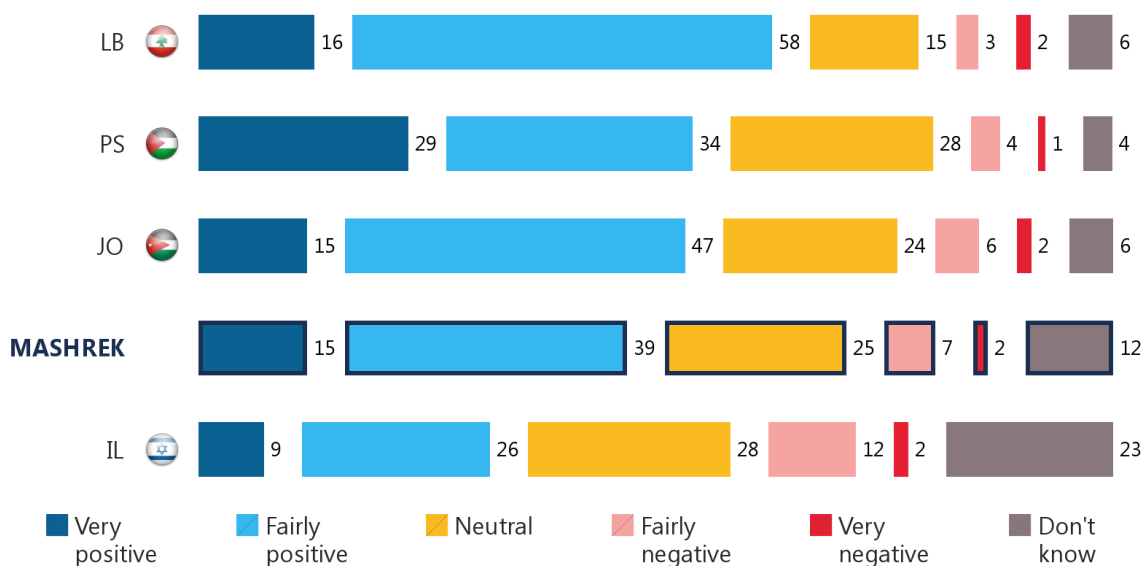
Base: respondents Maghreb (N=3085)

In Mashrek countries, Israel (35%) is the only country where a minority say the EU has a positive image on national television. At the other end of the scale 74% in Lebanon say the EU has a positive image on this media.

In Mashrek countries, respondents are now more likely to say the EU has a positive image on national television, with the largest increase seen in Jordan (+10 pp).

**B11.1** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

Television (%)



Base: respondents Mashrek (N=4000)

**B11.1** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

Television (%)

	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	54	▲ 7	25	▼ 3	9	▼ 3	12	▼ 1
JO	62	▲ 10	24	▼ 2	8	▼ 2	6	▼ 6
LB	74	▲ 8	15	▼ 6	5	▼ 4	6	▲ 2
IL	35	▲ 8	28	▼ 5	14	▼ 5	23	▲ 2
PS	63	▲ 5	28	▲ 2	5	▼ 5	4	▼ 2

Base: respondents Mashrek (N=4000)

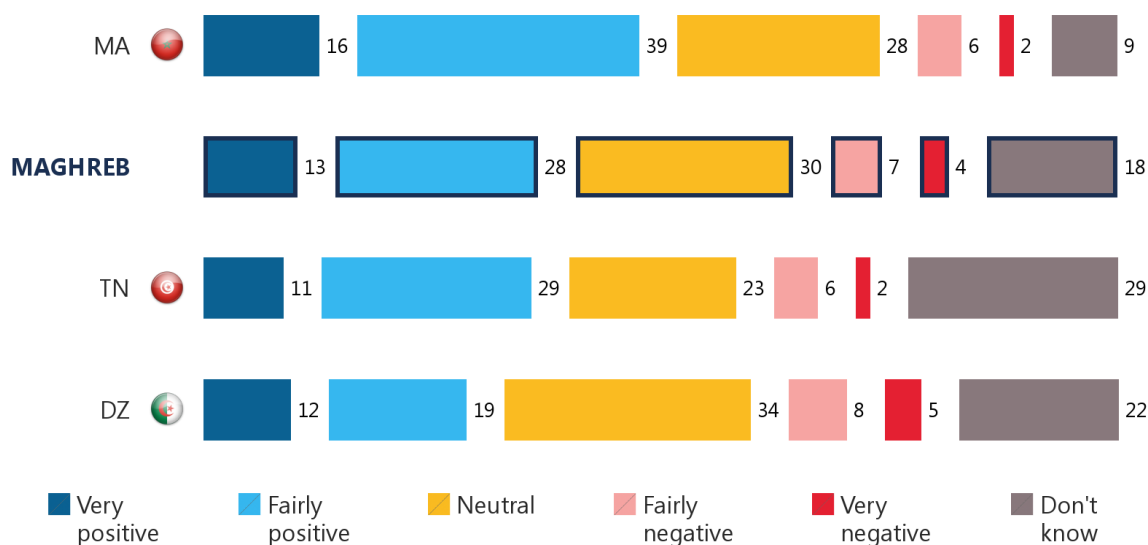


Morocco (55%) is the only country in the Maghreb where the majority say the EU has a positive image on national radio. This contrasts with 31% in Algeria who say the same. Respondents in Algeria are most likely to say the image is neutral (34%).

Compared to Autumn 2018, respondents in Morocco (-7 pp) and Algeria (-5 pp) are now less likely to say the EU has a positive image on national radio, while those in Tunisia (+5 pp) are more likely to say this.

**B11.2** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Radio (%)**



Base: respondents Maghreb (N=3085)

**B11.2** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Radio (%)**

	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	41	▼ 4	30	▼ 1	11	▲ 4	18	▲ 1
TN	40	▲ 5	23	▼ 10	8	▼ 5	29	▲ 10
DZ	31	▼ 5	34	▼ 4	13	▲ 7	22	▲ 2
MA	55	▼ 7	28	▲ 7	8	▲ 3	9	▼ 3

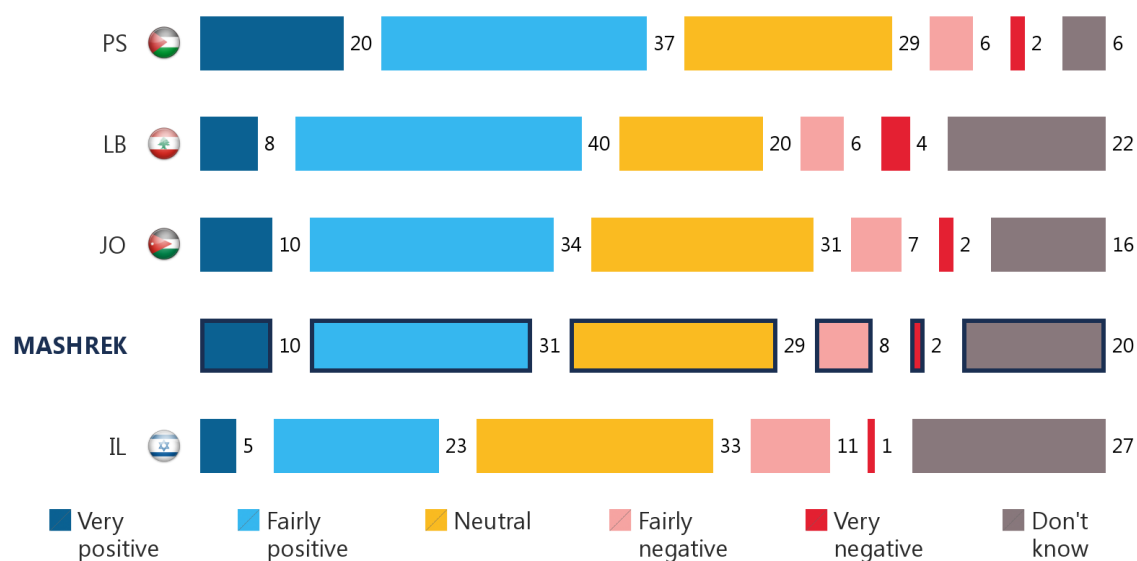
Base: respondents Maghreb (N=3085)

Palestine (57%) is the only country in the Mashrek where the majority say the EU's image on national radio is positive. At the other end of the scale 28% in Israel say the same, with respondents here most likely to say the image is neutral (33%).

There has been little change in Lebanon since Autumn 2018, but in the other three Mashrek countries respondents are now more likely to say the image of the EU on national radio is positive. The largest increase is seen amongst respondents in Jordan (+9 pp).

**B11.2** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Radio (%)**



Base: respondents Mashrek (N=4000)

**B11.2** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Radio (%)**

	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	41	▲ 6	29	▼ 1	10	▼ 4	20	▼ 1
JO	44	▲ 9	31	▲ 4	9	▼ 3	16	▼ 10
PS	57	▲ 8	29	=	8	▼ 7	6	▼ 1
IL	28	▲ 7	33	▼ 2	12	▼ 3	27	▼ 2
LB	48	▼ 1	20	▼ 4	10	▼ 4	22	▲ 9

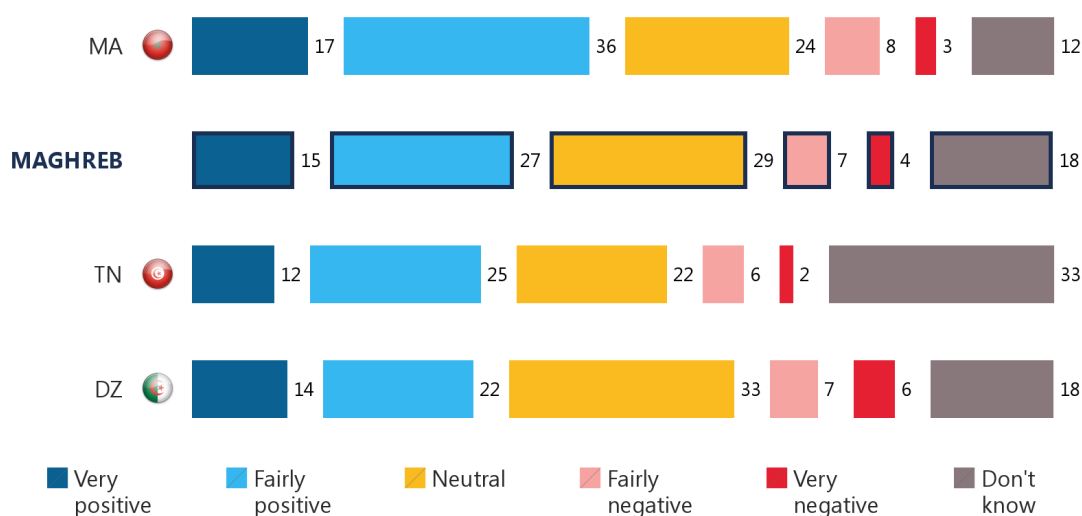
Base: respondents Mashrek (N=4000)

Morocco (53%) is the only country in the Maghreb where the majority say the EU has a positive image in the national printed press, although this is still the most common answer in Tunisia and Algeria. The proportion who say the image of the EU is negative in the printed press is low.

Perception in Algeria have become less positive (-7 pp) since Autumn 2018, accompanied by a six-point increase in the proportion who say the EU's image in the national printed press is negative.

**B11.3** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

Printed press (%)



Base: respondents Maghreb (N=3085)

**B11.3** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

Printed press (%)

	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	42	▼ 3	29	▼ 1	11	▲ 3	18	▲ 1
MA	53	▲ 3	24	▼ 1	11	▲ 4	12	▼ 6
TN	37	▲ 2	22	▼ 5	8	▼ 4	33	▲ 7
DZ	36	▼ 7	33	▼ 2	13	▲ 6	18	▲ 3

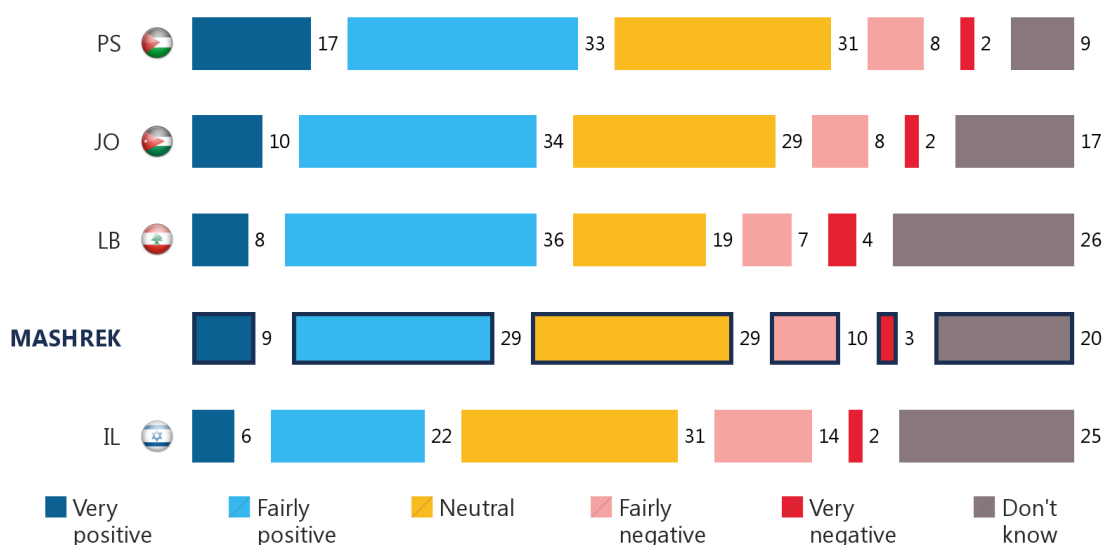
Base: respondents Maghreb (N=3085)

As was the case for the radio, respondents in Israel (28%) are much less likely than those in the other Mashrek countries to say the EU has a positive image in the printed press. They are most likely to say the image is neutral (31%). In each of the other countries, respondents most often say the image is positive, with the highest proportion seen in Palestine (50%).

Compared to Autumn 2018, respondents in Jordan (+9 pp), Palestine and Israel (both +6 pp) are now more likely to say the EU has a positive image in the national printed press.

**B11.3** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Printed press (%)**



Base: respondents Mashrek (N=4000)

**B11.3** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Printed press (%)**

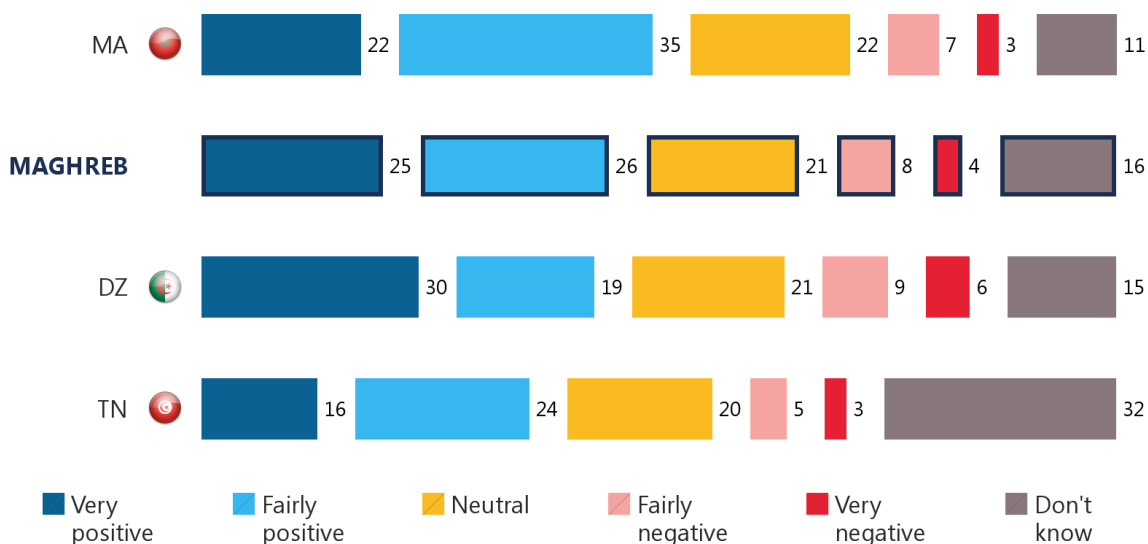
	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	38	▲ 3	29	▼ 1	13	▼ 2	20	=
JO	44	▲ 9	29	▲ 1	10	=	17	▼ 10
PS	50	▲ 6	31	▲ 2	10	▼ 7	9	▼ 1
IL	28	▲ 6	31	▼ 3	16	▼ 4	25	▲ 1
LB	44	▼ 3	19	▼ 6	11	▼ 3	26	▲ 12

Base: respondents Mashrek (N=4000)

Although the most common answer in each Maghreb country is that the EU has a positive image on national websites, proportions range from 57% in Morocco to 40% in Tunisia. The most notable change since Autumn 2019 is an increase in the proportion of respondents in Tunisia who say the EU's image on websites is negative (+9 pp).

**B11.4** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Websites (%)**



Base: respondents Maghreb (N=3085)

**B11.4** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Websites (%)**

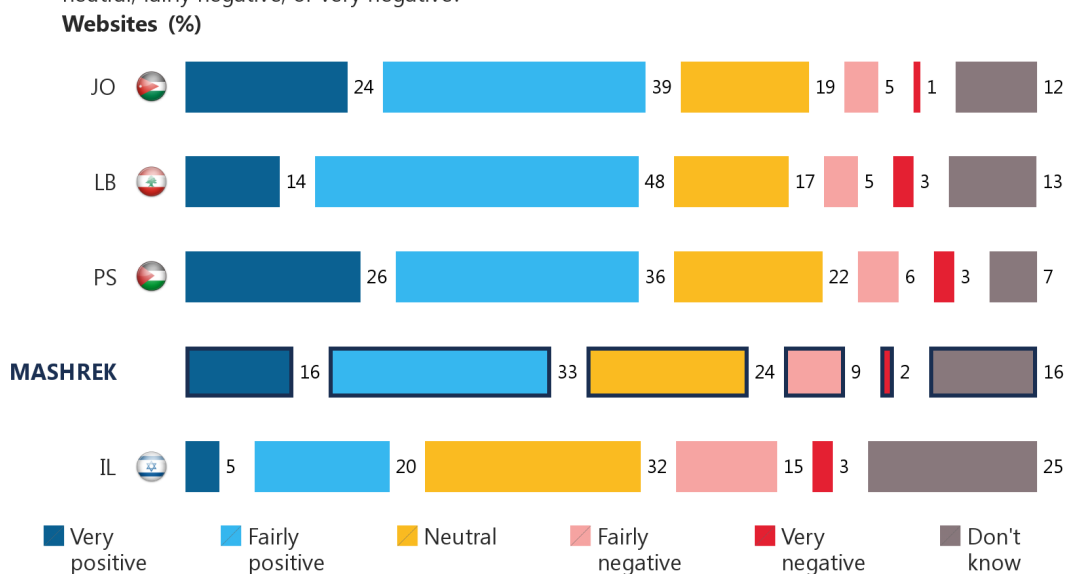
	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	51	▲ 2	21	▼ 6	12	▲ 4	16	=
MA	57	▲ 3	22	▼ 1	10	▲ 3	11	▼ 5
DZ	49	▲ 1	21	▼ 10	15	▲ 9	15	=
TN	40	▼ 2	20	▼ 2	8	▼ 5	32	▲ 9

Base: respondents Maghreb (N=3085)

Following the same pattern for other media types, respondents in Israel (35%) are much less likely than those in other countries to say the EU has a positive image on national websites. In the other Mashrek countries more than six in ten say the EU's image on national websites is positive.

In each Mashrek country, respondents are now more likely to think the EU has a positive image on national websites, compared to Autumn 2018. The largest increase is observed in Jordan (+15 pp).

**B11.4** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?



Base: respondents Mashrek (N=4000)

**B11.4** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

**Websites (%)**

	Total 'Positive'	Aut. 2019 - Aut. 2018	Neutral	Aut. 2019 - Aut. 2018	Total 'Negative'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	49	▲ 8	24	▼ 5	11	▼ 3	16	=
JO	63	▲ 15	19	▼ 8	6	▼ 4	12	▼ 3
LB	62	▲ 8	17	▼ 9	8	▼ 3	13	▲ 4
PS	62	▲ 8	22	=	9	▼ 7	7	▼ 1
IL	25	▲ 4	32	▼ 4	18	=	25	=

Base: respondents Mashrek (N=4000)

The socio-demographic analysis focuses on those who think the EU's image is positive, and shows the following:

- In both **Maghreb** and **Mashrek** countries, men are more likely to say the image of the EU in each type of media is positive, compared to women. For example, 55% of men in Maghreb say the EU's image on national websites is positive, compared to 46% of women.
- In the Maghreb, respondents aged 15-39 are the most likely to say the EU's image is positive in each type of media. In the **Mashrek**, on the other hand, those aged 25-54 are the most likely to say the EU's image on national radio is positive, while those under 55 are the most likely to say this when it comes to national websites.
- In the **Maghreb**, respondents living in rural villages or large town are much more likely to say the EU's image in each of these media is positive.
- In the **Maghreb**, retired persons are the least likely to say the EU's image on the national radio (32%), printed press (34%) and websites (38%) is positive. In the **Mashrek**, retired persons are the least likely to say the EU's image is positive on each of these media types.

Opinions about the EU are also influential. In both **Maghreb** and **Mashrek** countries, respondents who have a positive opinion of the EU, who say relations between the EU and their country are good, or who feel well informed about the EU are the most likely to say the EU's image on each type of media is positive. For example, in the Mashrek 67% of respondents with a positive image of the EU say the EU's image on national tv is positive, compared to 41% who have a negative image of the EU.

Finally, respondents in the **Mashrek** who have a relative living in the EU are more likely to say the EU has a positive image on each type of media.

**B11** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

(% - **MAGHREB**)

	Television	Radio	Printed press	Websites
	Total 'Positive'	Total 'Positive'	Total 'Positive'	Total 'Positive'
MAGHREB	59	41	42	51
<b>Gender</b>				
Male	62	42	47	55
Female	56	39	38	46
<b>Age</b>				
15-24	63	39	46	57
25-39	62	44	45	57
40-54	55	40	40	44
55 years	54	37	34	36
<b>Education (End of)</b>				
15-	56	41	42	48
16-19	57	38	45	60
20 or more	53	36	37	48
Still studying	63	40	46	54
<b>Subjective urbanisation</b>				
Rural area or village	64	44	41	45
Small/mid size town	44	27	30	39
Large town	60	42	47	56
<b>Occupation</b>				
Self-employed	61	43	46	52
Managers	56	38	44	54
White collars	52	38	45	50
Manual workers	57	44	40	53
House persons	68	46	43	48
Unemployed	55	38	39	47
Retired	53	32	34	38
Students	63	39	45	54
<b>Relatives living in the EU</b>				
Yes	60	39	43	52
No	59	42	42	49
<b>Opinion of the EU</b>				
Positive	72	52	53	61
Neutral	53	33	37	47
Negative	47	33	35	40
<b>Relations between EU and country</b>				
Good	67	47	49	56
Bad	47	31	33	48
<b>Informed about the EU</b>				
Well-informed	66	47	50	59
Not informed	54	37	37	45



**B11** Do you think that the European Union's image in the (NATIONALITY) ... is very positive, fairly positive, neutral, fairly negative, or very negative?

(% - MASHREK)

	Television	Radio	Printed press	Websites
	Total 'Positive'	Total 'Positive'	Total 'Positive'	Total 'Positive'
MASHREK	54	41	38	49
<b>Gender</b>				
Male	56	44	42	51
Female	51	38	36	45
<b>Age</b>				
15-24 years	52	38	37	51
25-39 years	57	44	42	51
40-54 years	56	45	41	50
55 years or more	48	35	33	39
<b>Education (End of)</b>				
15-	66	45	40	56
16-19	51	38	35	45
20 or more	53	41	41	49
Still studying	54	40	39	51
<b>Subjective urbanisation</b>				
Rural area or village	52	39	34	42
Small/mid size town	56	39	39	48
Large town	53	42	39	50
<b>Occupation</b>				
Self-employed	61	48	45	56
Managers	54	42	43	46
White collars	43	33	30	39
Manual workers	54	41	42	57
House persons	63	47	43	55
Unemployed	59	43	38	54
Retired	45	32	34	37
Students	54	41	39	49
<b>Relatives living in the EU</b>				
Yes	60	46	45	54
No	52	39	36	47
<b>Opinion of the EU</b>				
Positive	67	50	47	63
Neutral	42	31	30	37
Negative	41	34	32	31
<b>Relations between EU and country</b>				
Good	63	46	44	59
Bad	41	35	33	30
<b>Informed about the EU</b>				
Well-informed	58	44	42	52
Not informed	50	38	35	45

### III. THE NATIONAL AND PERSONAL SITUATION

This final section of the report considers various aspects of life for respondents in Maghreb and Mashrek countries, including satisfaction with their personal life, their financial and work situation, as well as their expectations for the coming 12 months.

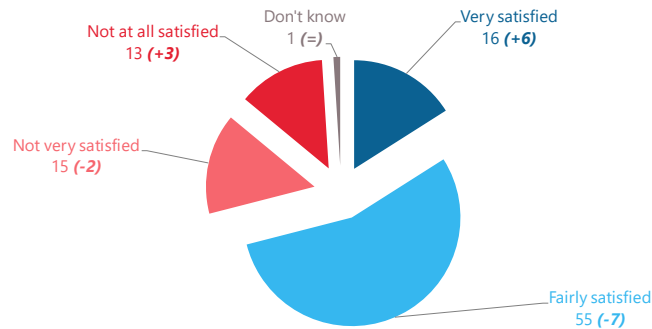
Respondent’s views on the current situation in their country, as well as the main challenges it faces are also discussed.

#### 1. Personal life in general

##### Satisfaction with life being led

More than two thirds of respondents in Maghreb (71%) and Mashrek (68%) countries say they are satisfied, on the whole, with the life they lead<sup>39</sup>, nearly the same as in 2018.

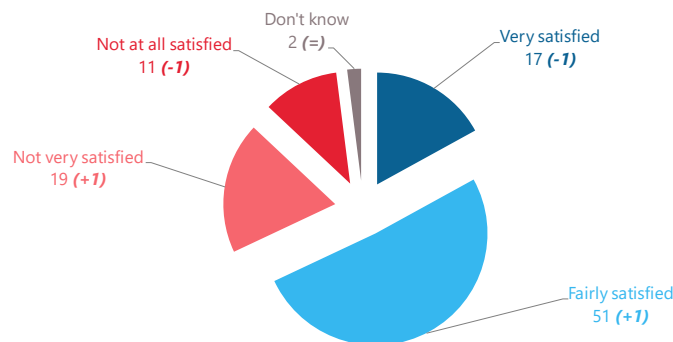
**C1** On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?  
(% - **MAGHREB**)



(Autumn 2019 - Autumn 2018)

Base: respondents Maghreb (N=3085)

**C1** On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?  
(% - **MASHREK**)

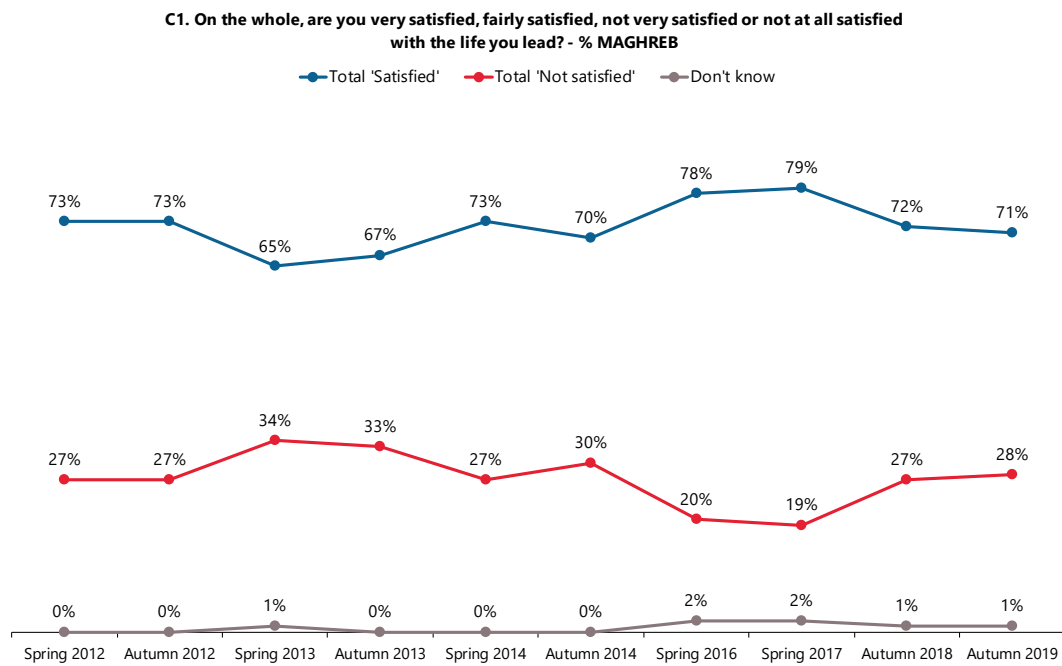


(Autumn 2019 - Autumn 2018)

Base: respondents Mashrek (N=4000)

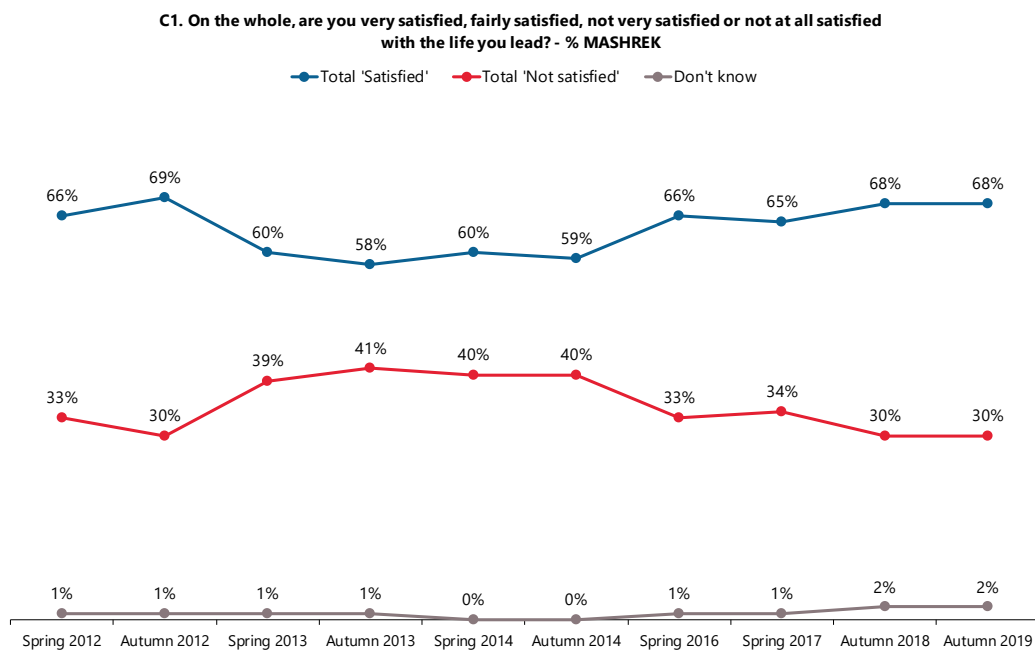
<sup>39</sup> C1. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?

In the Maghreb, satisfaction remains lower than the peaks of 2016 and 2017, but is still higher than the low points of Spring and Autumn of 2013.



Base: respondents Maghreb (N=3085)




In the Mashrek, satisfaction has kept rising since Autumn 2014, and has returned to nearly the same level of satisfaction as Autumn 2012 and has been relatively stable since Spring 2016.



Base: respondents Mashrek (N=4000)

There is little difference in satisfaction levels between the Maghreb countries, with proportions ranging from 70% satisfied in Algeria to 73% in Morocco. However, compared to summer 2018, respondents in Tunisia are now much more likely to be satisfied (+13 pp).





- C1** On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?  
(%)

	Total 'Satisfied'	Aut. 2019 - Aut. 2018	Total 'Not satisfied'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	71	▼ 1	28	▲ 1	1	=
TN 	70	▲ 13	25	▼ 15	5	▲ 2
MA 	73	▼ 2	25	▲ 1	2	▲ 1
DZ 	70	▼ 4	30	▲ 5	0	▼ 1

Base: respondents Maghreb (N=3085)

There is much more variation between Mashrek countries. Respondents in Israel are the most likely to be satisfied (79%), followed by 70% in Jordan. This compares to less than six in ten in Lebanon (59%) and Palestine (52%). Respondents in Jordan are now less satisfied than they were in 2018 (-5 pp), while in Lebanon satisfaction has increased in (+6 pp).

- C1** On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?  
(%)






	Total 'Satisfied'	Aut. 2019 - Aut. 2018	Total 'Not satisfied'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	68	=	30	=	2	=
LB 	59	▲ 6	41	▼ 6	0	=
IL 	79	=	18	=	3	=
PS 	52	▼ 2	45	▲ 4	3	▼ 2
JO 	70	▼ 5	30	▲ 5	0	=

Base: respondents Mashrek (N=4000)






The socio-demographic analysis reveals the following:

- Women in the **Maghreb** are more likely to be satisfied with the life they lead, compared to men (76% vs 66%).
- In the **Mashrek**, respondents aged 55 and older are more likely to be satisfied than younger respondents (73% vs 67%).
- In the **Mashrek**, respondents who completed education aged 16 or older are more likely to be satisfied than those who completed aged 15 or younger.
- In both **Maghreb** and **Mashrek** countries, managers are more likely to be satisfied than those in other occupation groups (both 80%).
- In both **Maghreb** and **Mashrek** countries, respondents who experience fewer financial difficulties are more likely to be satisfied. For example, in the Mashrek 81% of those who experience the least financial difficulties are satisfied, compared to 55% of those who experience the most difficulties.

**C1** On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?  
(% - **MAGHREB**)

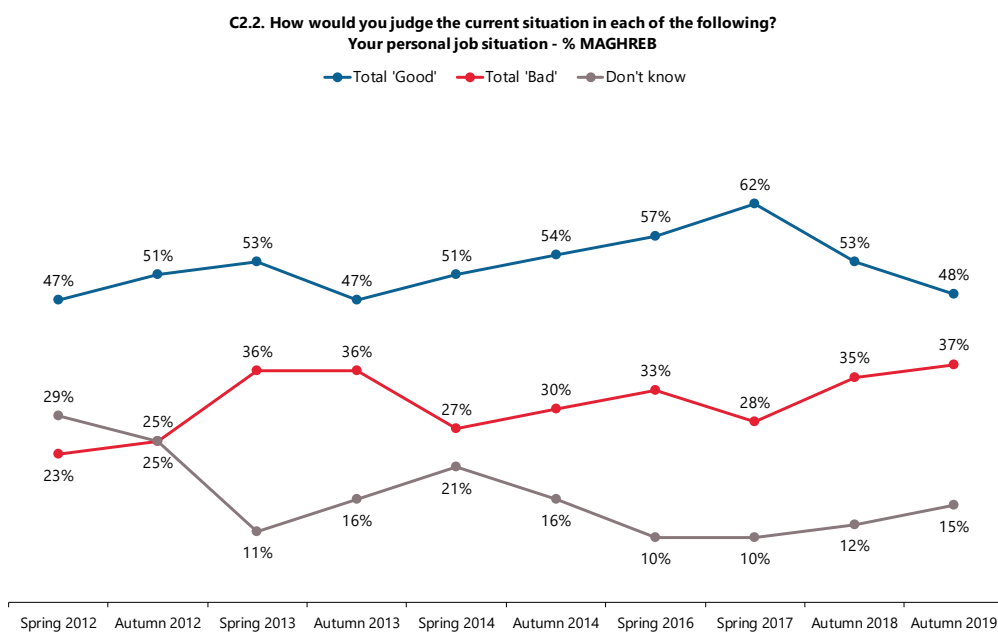
	Total 'Satisfied'	Total 'Not satisfied'
MAGHREB	71	28
 <b>Gender</b>		
Male	66	32
Female	76	23
 <b>Age</b>		
15-24 years	74	25
25-39 years	71	28
40-54 years	69	30
55 years or more	68	29
 <b>Education (End of)</b>		
15-	68	31
16-19	67	32
20 or more	70	29
Still studying	78	21
 <b>Occupation</b>		
Self-employed	73	26
Managers	80	20
White collars	70	29
Manual workers	64	33
House persons	73	25
Unemployed	66	33
Retired	69	29
Students	78	21
 <b>Difficulties paying bills</b>		
Most of the time	54	44
From time to time	74	25
Almost never/ never	78	21

**C1** On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?  
(% - **MASHREK**)

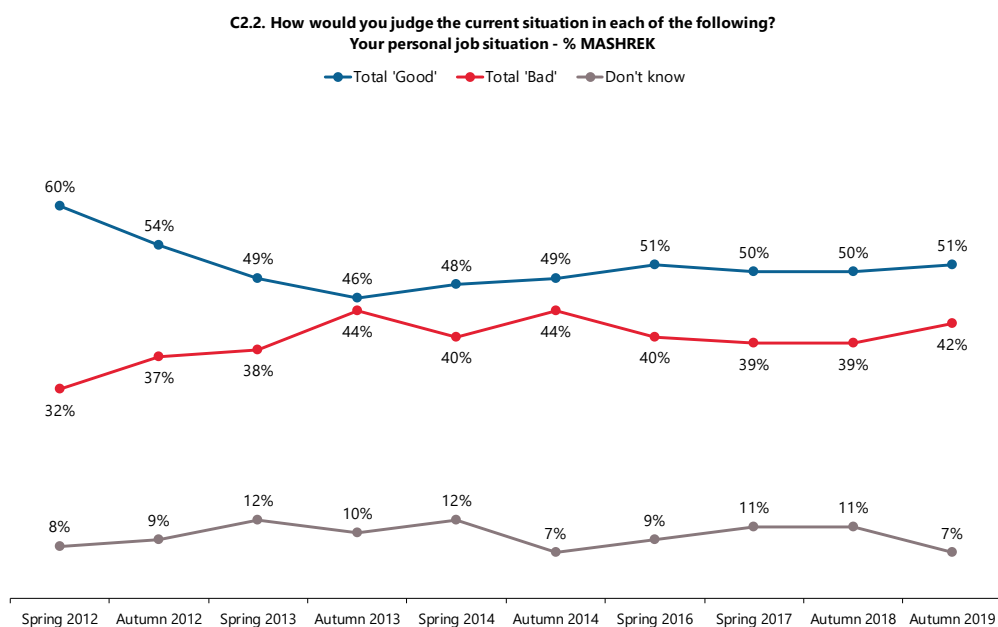
	Total 'Satisfied'	Total 'Not satisfied'
MASHREK	68	30
 <b>Gender</b>		
Male	68	30
Female	68	30
 <b>Age</b>		
15-24 years	67	30
25-39 years	67	31
40-54 years	67	32
55 years or more	73	25
 <b>Education (End of)</b>		
15-	52	47
16-19	70	28
20 or more	73	25
Still studying	69	28
 <b>Occupation</b>		
Self-employed	66	32
Managers	80	19
White collars	74	24
Manual workers	54	44
House persons	60	38
Unemployed	60	38
Retired	77	23
Students	71	27
 <b>Difficulties paying bills</b>		
Most of the time	55	44
From time to time	70	29
Almost never/ never	81	18

## Personal job situation

In both Maghreb and Mashrek countries, respondents are most likely to say their current personal job situation is good (Maghreb: 48%, Mashrek: 51%)<sup>40</sup>. Opinion in the Mashrek has remained relatively stable since Spring 2016. In the Maghreb, on the other hand, it has declined considerably since Spring 2017 (-14 pp) and is now almost equal to previous low points in Spring 2012 and Autumn 2013.



Base: respondents Maghreb (N=3085)






Base: respondents Mashrek (N=4000)

<sup>40</sup> C2.2 How would you judge the current situation in each of the following? Your personal job situation

In all Mashrek countries, respondents most often say their current personal job situation is good, ranging from 54% in Tunisia to 44% in Algeria. Compared to Autumn 2018, respondents in Tunisia have become more positive about this aspect of their life (+10 pp in 'good' rating), while those in Algeria are now less positive (-14 pp 'good').

**C2.2** How would you judge the current situation in each of the following?

**Your personal job situation (%)**





	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	48	▼ 5	37	▲ 2	15	▲ 3
TN 	54	▲ 10	36	▼ 12	10	▲ 2
MA 	51	▲ 2	40	▲ 4	9	▼ 6
DZ 	44	▼ 14	35	▲ 5	21	▲ 9

Base: respondents Maghreb (N=3085)

Israel is the only country in the Mashrek where the majority say that currently their personal job situation is good (73%). In the other three countries the majority say it is bad, with the largest proportion in Lebanon (59%). Opinion has remained generally stable since Autumn 2018, with the exception of Jordan, where there has been a 17-point increase in the proportion of respondents who think their job situation is 'bad'.

**C2.2** How would you judge the current situation in each of the following?

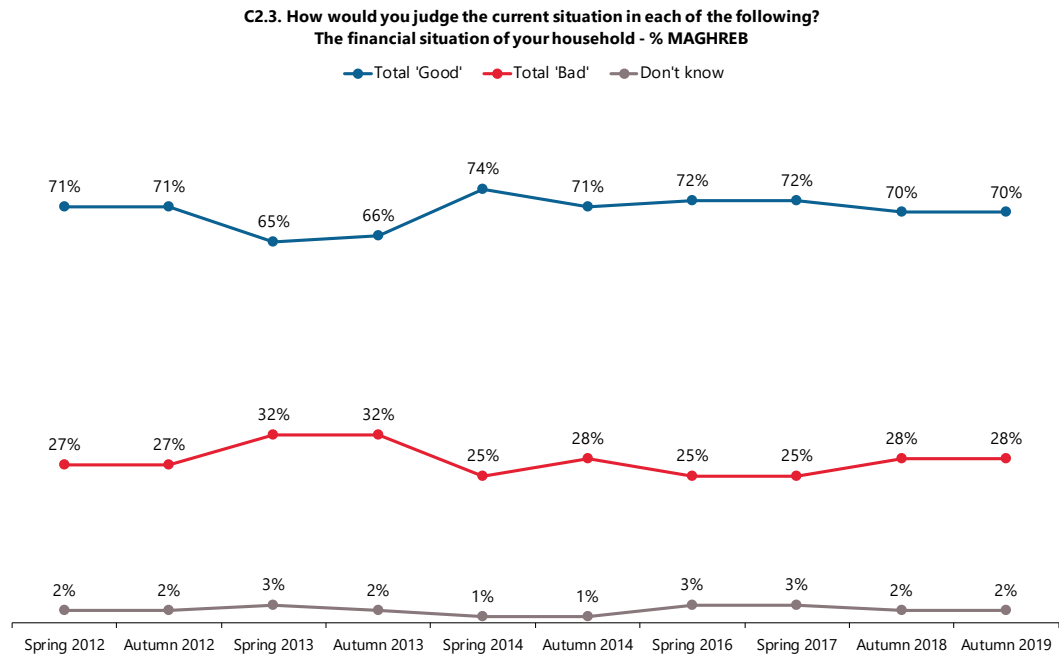
**Your personal job situation (%)**

	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	51	▲ 1	42	▲ 3	7	▼ 4
IL 	73	▲ 2	21	▼ 3	6	▲ 1
PS 	44	▲ 1	53	▼ 1	3	=
LB 	37	▼ 1	59	▲ 1	4	=
JO 	35	▼ 2	51	▲ 17	14	▼ 15

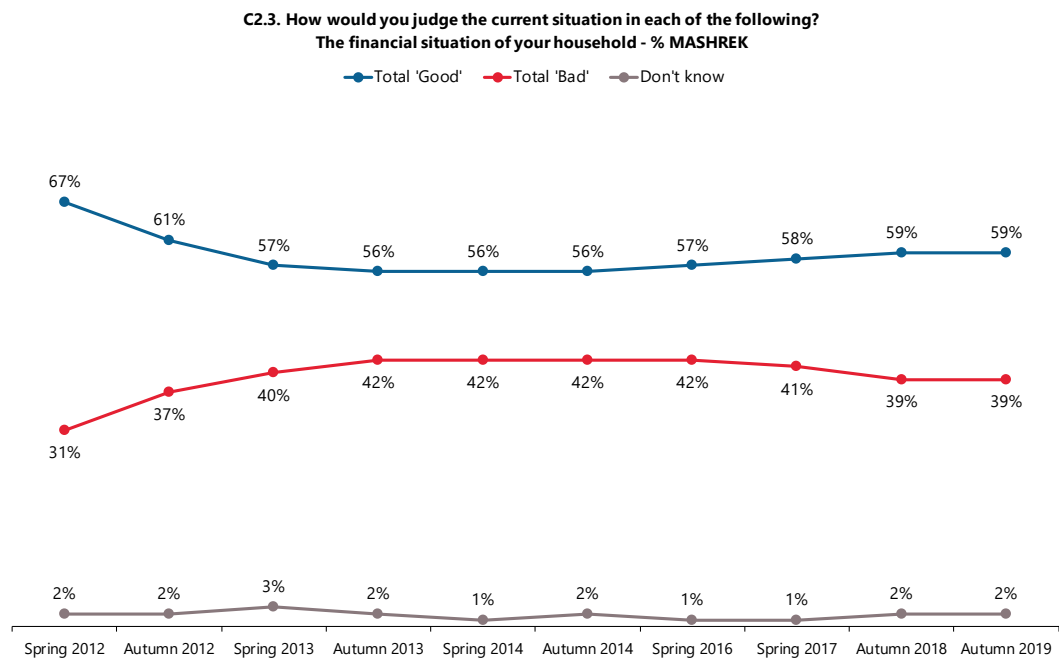
Base: respondents Mashrek (N=4000)

## Household financial situation

Respondents in the Maghreb (70%) are much likely to be positive about their current household's financial situation than those in the Mashrek (59%), although the majority of respondents in each group of countries feels 'good' about it<sup>41</sup>. Opinion in both Maghreb and Mashrek countries has remained relatively stable over the longer term.



*Base: respondents Maghreb (N=3085)*



*Base: respondents Mashrek (N=4000)*




<sup>41</sup> C2.3 How would you judge the current situation in each of the following? The financial situation of your household



More than six in ten respondents in each Maghreb country say that currently the financial situation of their household is good, with those in Algeria (75%) the most likely to do so. There has been little change since Autumn 2018.

**C2.3** How would you judge the current situation in each of the following?

**The financial situation of your household (%)**





	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	70	=	28	=	2	=
TN 	64	▲ 3	32	▼ 4	4	▲ 1
MA 	66	=	33	▲ 1	1	▼ 1
DZ 	75	▼ 1	24	▲ 2	1	▼ 1

*Base: respondents Maghreb (N=3085)*

Respondents in Israel (73%) are much more likely than those in other countries to say the financial situation of their household is good, although the majority in Jordan also say this (56%). The majority in Palestine (54%) and Lebanon (53%) on the other hand, say their household's financial situation is bad. Compared to Autumn 2019, respondents in Jordan are now less likely to say this situation is good (-9 pp) and more likely to say it is bad (+8 pp).

**C2.3** How would you judge the current situation in each of the following?

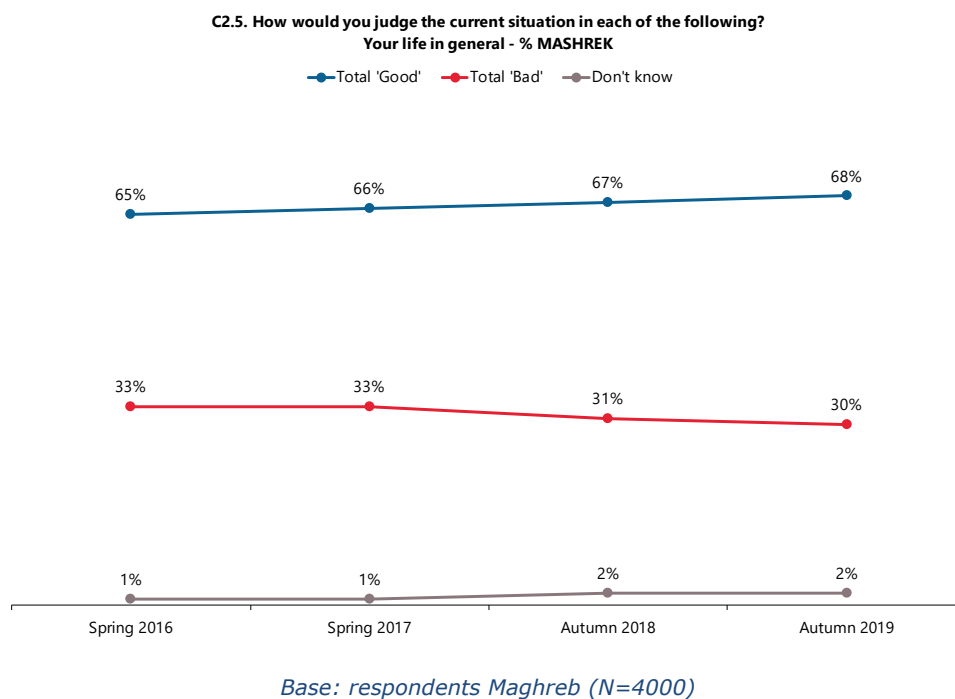
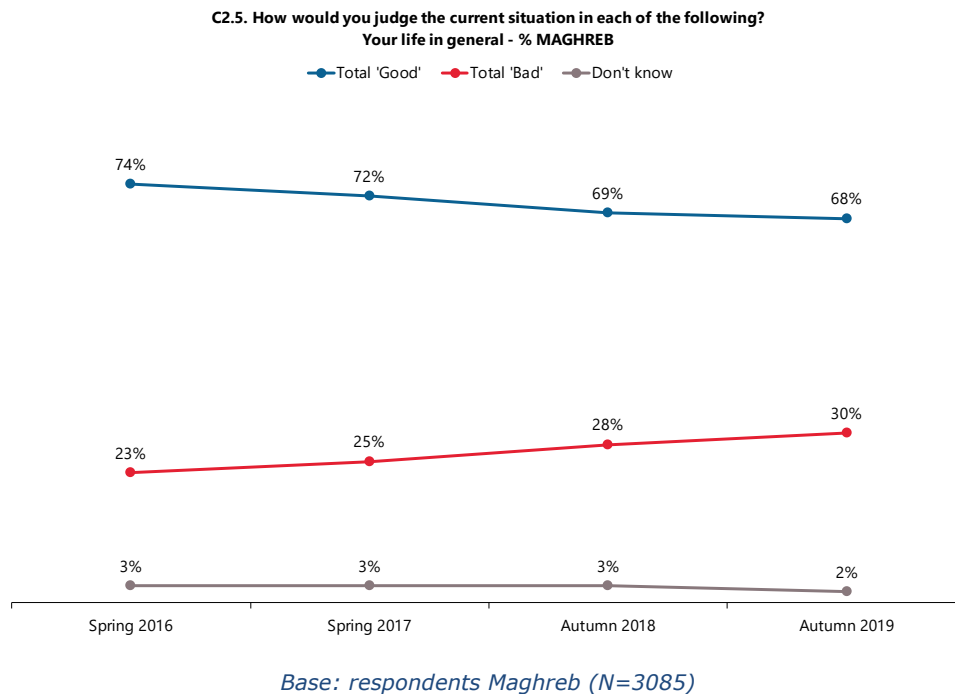
**The financial situation of your household (%)**

	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	59	=	39	=	2	=
IL 	73	▲ 4	23	▼ 4	4	=
LB 	47	=	53	=	0	=
PS 	45	=	54	▲ 2	1	▼ 2
JO 	56	▼ 9	43	▲ 8	1	▲ 1

*Base: respondents Mashrek (N=4000)*

## Life in general



In both Maghreb and Mashrek countries, just over six in ten respondents say their life in general is good (both 68%)<sup>42</sup>. Opinion in the Mashrek has remained relatively stable since Spring 2017, while in the Maghreb the positive view has been declining, albeit slowly.



<sup>42</sup> C2.5 How would you judge the current situation in each of the following? Your life in general

More than six in ten respondents in each Maghreb country say their life in general is good, with those in Algeria the most likely to say this (74%). Opinion has remained relatively stable compared to Autumn 2018, although respondents in Tunisia are now less likely to say their life in general is bad (-7 pp), while those in Morocco are more likely to do so (+5 pp).





**C2.5** How would you judge the current situation in each of the following?  
**Your life in general (%)**

	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	68	▼ 1	30	▲ 2	2	▼ 1
TN 	66	▲ 4	29	▼ 7	5	▲ 3
DZ 	74	=	25	▲ 2	1	▼ 2
MA 	62	▼ 3	37	▲ 5	1	▼ 2

*Base: Respondents Maghreb (N=3085)*

In every country except Palestine, the majority of respondents say their life in general is good, although those in Israel (84%) are much more likely to say this than respondents in Lebanon (51%). In Palestine the majority (54%) say their life in general is bad. Compared to Autumn 2018, respondents in Jordan have become more negative, with a five-point decline in 'good' ratings and a five-point increase in 'bad' ratings.

**C2.5** How would you judge the current situation in each of the following?  
**Your life in general (%)**

	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	68	▲ 1	30	▼ 1	2	=
PS 	44	▲ 2	54	▲ 1	2	▼ 3
LB 	51	▲ 1	49	▼ 1	0	=
IL 	84	=	12	▼ 1	4	▲ 1
JO 	71	▼ 5	29	▲ 5	0	=

*Base: respondents Mashrek (N=4000)*

The socio-demographic analysis for the last three questions highlights the following:

- In the **Maghreb**, women are more likely to say their life in general is good (72% vs 65% of men). In the **Mashrek**, men are more likely than women to say their personal job situation is good (55% vs 48%).
- In the **Maghreb**, respondents aged 25-54 are the most likely to say their personal job situation is good, while those aged 15-39 are the most likely to say this about their household financial situation. In the **Mashrek** as respondents get older, they are more likely to say their personal job situation is good, while those aged 55 and older are the most likely to say their household financial situation is good.
- In both **Maghreb** and **Mashrek** countries, those who completed education aged 16 or older are more likely to say each of these aspects of their life is currently good compared to those who completed education aged 15 or younger. For instance, in Maghreb 74% of respondents who completed education between 16 and 19 years of age say their household financial situation is good, compared to 66% of those who completed education aged 15 or younger.
- In both **Maghreb** and **Mashrek** countries, managers are more likely than other occupation groups to say each of these aspects of their life is currently good.
- In both **Maghreb** and **Mashrek** countries, the fewer financial difficulties a respondent experiences, the more likely they are to say each of these aspects of their life is currently good. For example, in the Mashrek 78% of those with the least financial difficulties say their life in general is good, compared to 55% of those who experience the most difficulties.

**C2** How would you judge the current situation in each of the following?

(% - **MAGHREB**)

	Your personal job situation	The financial situation of your household	Your life in general
	Total 'Good'	Total 'Good'	Total 'Good'
MAGHREB	48	70	68
<b>Gender</b>			
Male	50	69	65
Female	46	71	72
<b>Age</b>			
15-24 years	43	75	70
25-39 years	52	72	69
40-54 years	50	66	66
55 years or more	45	65	67
<b>Education (End of)</b>			
15-	45	66	63
16-19	53	74	70
20 or more	52	74	73
Still studying	41	77	75
<b>Occupation</b>			
Self-employed	66	79	73
Managers	73	83	83
White collars	63	74	71
Manual workers	50	63	62
House persons	43	63	62
Unemployed	32	66	64
Retired	45	62	68
Students	41	76	74
<b>Difficulties paying bills</b>			
Most of the time	34	56	55
From time to time	50	68	67
Almost never/ never	55	81	78

**C2** How would you judge the current situation in each of the following?

(% - **MASHREK**)

	Your personal job situation	The financial situation of your household	Your life in general
	Total 'Good'	Total 'Good'	Total 'Good'
MASHREK	51	59	68
<b>Gender</b>			
Male	55	61	67
Female	48	57	68
<b>Age</b>			
15-24 years	44	59	68
25-39 years	51	58	66
40-54 years	55	56	67
55 years or more	57	65	71
<b>Education (End of)</b>			
15-	31	37	44
16-19	53	60	70
20 or more	63	68	74
Still studying	40	59	70
<b>Occupation</b>			
Self-employed	56	62	63
Managers	81	79	84
White collars	68	65	76
Manual workers	42	51	54
House persons	34	46	56
Unemployed	24	42	52
Retired	59	70	78
Students	42	59	72
<b>Difficulties paying bills</b>			
Most of the time	30	35	50
From time to time	53	61	69
Almost never/ never	71	83	84

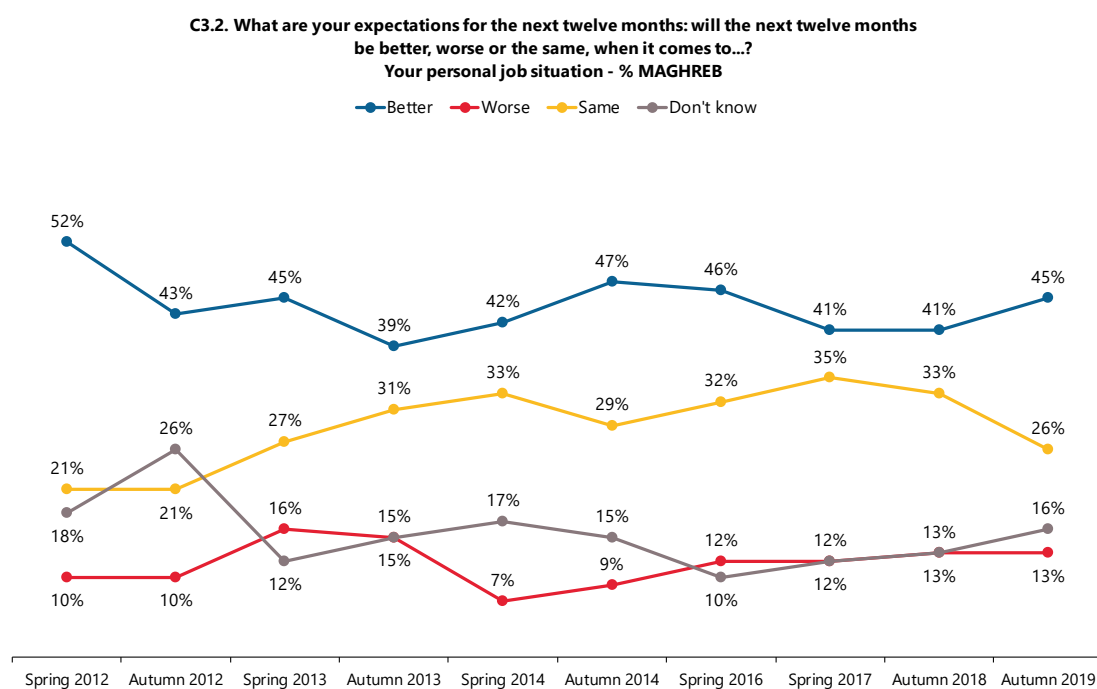
## Expectations

Respondents were asked about their expectations for the next 12 months regarding their personal job situation, their household financial situation, and their life in general<sup>43</sup>.

### Personal job situation

Respondents in the Maghreb are much more likely to have positive expectations for their personal job situation in the next 12 months: 45% think it will be better, compared to 25% in the Mashrek. In fact, for the first time since Autumn 2014, respondents in the Mashrek are more likely think things will get worse than better – although the difference is small (1 pp). Respondents in the Mashrek are most likely to say their personal job situation will be the same (40%), and they are more likely to do so than those in Maghreb (26%). Respondents in the Mashrek are also more likely than those in Maghreb to say their personal job situation will be worse (26% vs 13%).

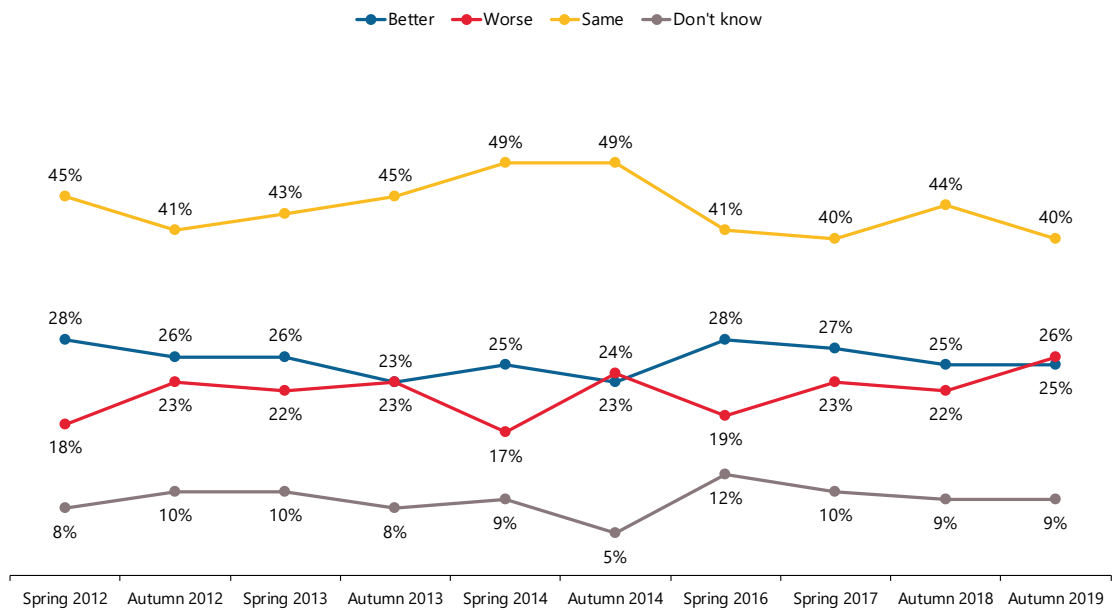
In the Maghreb, optimism has increased slightly since Autumn 2018, and is approaching the level last seen in Autumn 2014 and Spring 2016. In the Mashrek the pessimistic view has increased slightly (+4 pp) since Autumn 2018, and the proportion who think things will be the same has also declined slightly (-4 pp). In fact, the proportion in the Mashrek who think their personal job situation will be worse is at its highest ever level.



Base: respondents Maghreb (N=3085)

<sup>43</sup> C3. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? 3.2 Your personal job situation; 3.3 The financial situation of your household; 3.5 Your life in general.

**C3.2. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?**  
**Your personal job situation - % MASHREK**



Base: respondents Mashrek (N=4000)

In the Maghreb, respondents in Algeria (56%) and Morocco (36%) are most likely to think their personal job situation will be better in the next 12 months, while those in Tunisia (42%) are most likely to think it will stay the same. The most notable changes since Autumn 2018 are in Algeria, where respondents are more likely to think their situation will be better (+9 pp) and less likely to think it will be the same (-15 pp) or worse (-5 pp).

**C3.2** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**Your personal job situation (%)**

	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	45	▲ 4	13	=	26	▼ 7	16	▲ 3
DZ 🇩🇿	56	▲ 9	5	▼ 5	18	▼ 15	21	▲ 11
MA 🇲🇦	36	▼ 1	22	▲ 4	31	▲ 3	11	▼ 6
TN 🇹🇳	31	▼ 1	14	▼ 1	42	▼ 2	13	▲ 4





Base: respondents Maghreb (N=3085)

In Mashrek countries, respondents in Palestine (46%) and Lebanon (43%) are most likely to say their personal job situation will be worse in the next 12 months, while those in Israel (51%) and Jordan (38%) most often say it will be the same.

Compared to Autumn 2018, respondents in Palestine are now much less likely to say their personal job situation will remain the same (-17 pp). Over the same period the proportions who think it will be better (+7 pp) or worse (+11 pp) have increased. In Jordan, on the other hand, respondents have become more pessimistic (-6 pp “better” and +8 pp “worse”).

**C3.2** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**Your personal job situation (%)**

	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	25	=	26	▲ 4	40	▼ 4	9	=
PS 	25	▲ 7	46	▲ 11	24	▼ 17	5	▼ 1
LB 	13	▲ 3	43	▲ 2	39	▼ 4	5	▼ 1
IL 	31	=	8	=	51	▼ 2	10	▲ 2
JO 	25	▼ 6	25	▲ 8	38	▲ 1	12	▼ 3

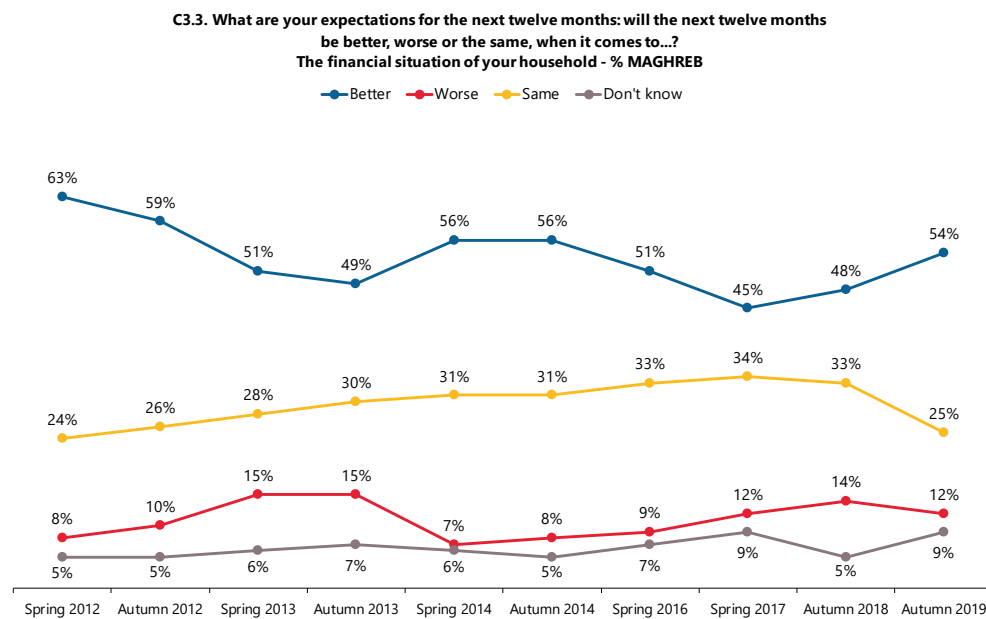
*Base: respondents Mashrek (N=4000)*



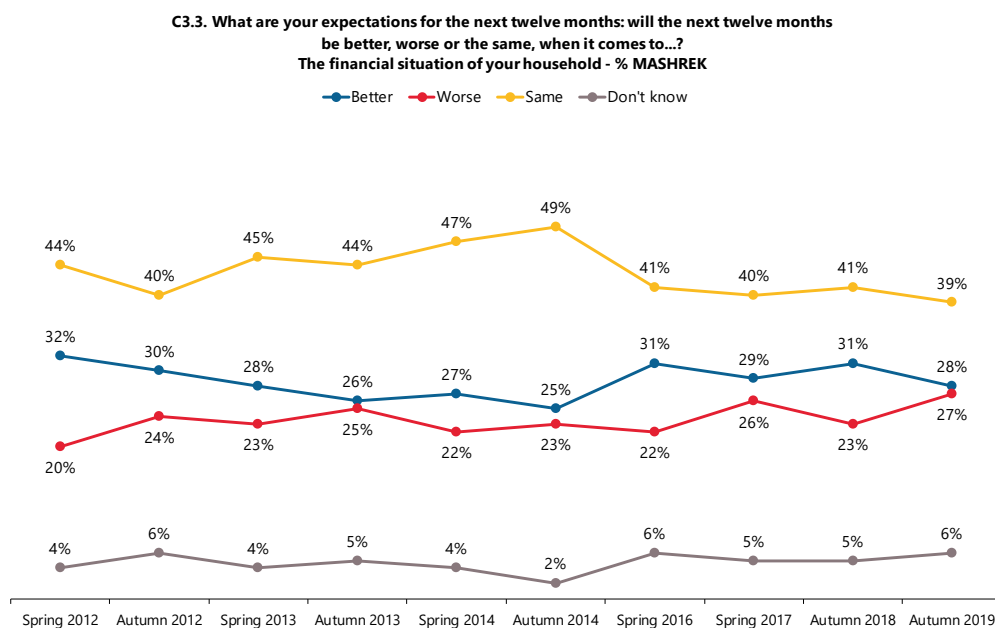
## Household financial situation

Respondents in the Maghreb are also more optimistic about the financial situation in their household over the next 12 months. The majority (54%) think it will be better, compared to 28% in the Mashrek who say the same. Respondents in the Mashrek are most likely to think this situation will be the same (39%).

Since Autumn 2018, respondents in Maghreb countries have become more positive (+6 pp 'better'), and over the longer term the optimistic outlook is approaching the level last seen in 2014. There has been relatively little change in Mashrek countries since the previous wave, with the largest one a four-point increase in the proportion who say their household financial situation will be worse. This measure is now at its highest level.



Base: respondents Maghreb (N=3085)






Base: respondents Mashrek (N=4000)

Although respondents in Algeria (67%) and Morocco (43%) are most likely to think their household's financial situation will be better in the next 12 months, Algeria is the only country in Maghreb where the majority think this way. Respondents in Tunisia, on the other hand, most often say this situation will be the same (42%).

The largest changes since Autumn 2018 are seen amongst respondents in Algeria, with a 14-point increase in the proportion who think their household's financial situation will be better in the next 12 months.

**C3.3** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**The financial situation of your household (%)**





	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	54	▲ 6	12	▼ 2	25	▼ 8	9	▲ 4
DZ 	67	▲ 14	4	▼ 5	20	▼ 14	9	▲ 5
MA 	43	▼ 3	24	▲ 4	27	=	6	▼ 1
TN 	34	▼ 3	12	▼ 4	42	▲ 1	12	▲ 6

*Base: respondents Maghreb (N=3085)*

Opinion in Mashrek countries is mixed. Respondents in Israel (46%) and Lebanon (44%) are most likely to think their household financial situation will be the same in the next 12 months. In Jordan respondents are equally likely to think it will be the same or better (both 34%). Palestine is the only country where respondents are most likely to think it will be worse (48%). In fact, the proportion holding this view in Palestine has increased 14 points since Autumn 2018. In Jordan, respondents are now much less likely to think this situation will be better in the next 12 months (-16 pp), and more likely to think it will be the same (+7 pp) or worse (+8 pp).

**C3.3** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**The financial situation of your household (%)**

	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	28	▼ 3	27	▲ 4	39	▼ 2	6	▲ 1
PS 	24	▲ 4	48	▲ 14	24	▼ 16	4	▼ 2
LB 	15	▲ 2	37	=	44	▼ 2	4	=
IL 	31	=	12	▲ 1	46	▼ 5	11	▲ 4
JO 	34	▼ 16	29	▲ 8	34	▲ 7	3	▲ 1

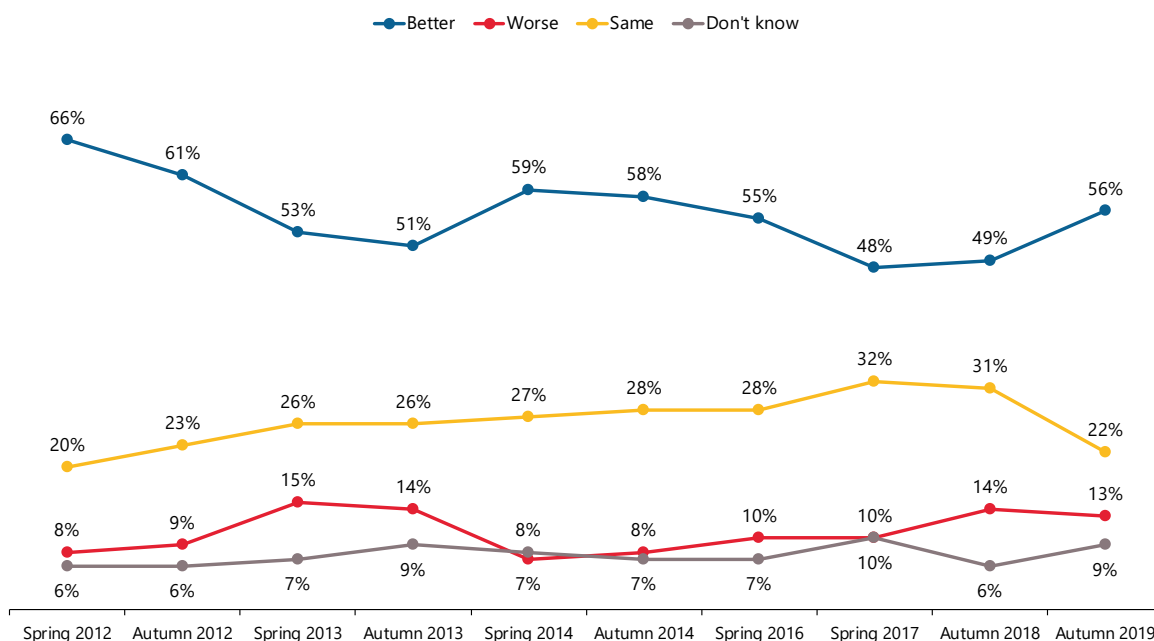
Base: respondents Mashrek (N=4000)

**Life in general**

Given they are more optimistic about their future job and household financial situation, it is not surprising respondents in the Maghreb are more optimistic about their life in general in the next 12 months (56% vs 32% in Mashrek). In Mashrek, on the other hand, respondents are most likely to think life in general will be the same (38%), while 24% think it will be worse.

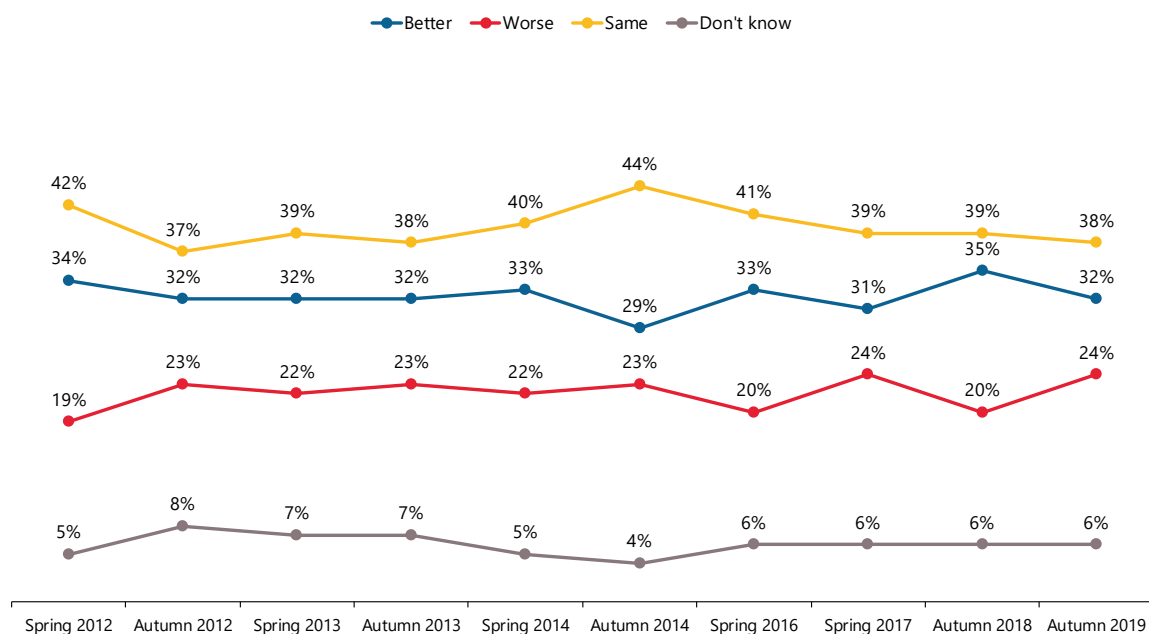
Compared to Autumn 2018, respondents in the Maghreb are now more likely to think life will be better (+7 pp) and less likely to think it will be the same (-9 pp). Over the longer term, the increase in optimism reverses several years of declines. In the Mashrek, on the other hand, results have varied relatively little over the longer term.

**C3.5. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?**  
**Your life in general - % MAGHREB**



Base: respondents Maghreb (N=3085)

**C3.5. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?**  
**Your life in general - % MASHREK**






Base: respondents Mashrek (N=4000)

In Maghreb, respondents in Algeria (74%) are much more likely to think life in general will be better in the next 12 months than respondents in Morocco (42%) or Tunisia (35%). In fact, in Tunisia respondents most often say life will be the same (40%). Compared to Autumn 2018, respondents in Algeria are now much more likely to be optimistic (+18 pp 'better'), and less likely to be pessimistic (-17 pp 'worse').

**C3.5** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**Your life in general (%)**





	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	56	▲ 7	13	▼ 1	22	▼ 9	9	▲ 3
DZ 	74	▲ 18	4	▼ 5	13	▼ 17	9	▲ 4
TN 	35	▼ 2	13	▼ 1	40	▼ 3	12	▲ 6
MA 	42	▼ 3	24	▲ 3	27	=	7	=

Base: respondents Maghreb (N=3085)

Jordan (42%) is the only country in the Mashrek where respondents are most likely to say life in general will be better in the next 12 months. In Israel and Lebanon respondents most often say life will be the same (both 46%), while in Palestine they are most likely to say it will be worse (45%). Opinion in Palestine has become more divided since Autumn 2018, with increases in the proportion who think life will be better (+8 pp) or worse (+14 pp), and a decline in the proportion who think it will remain the same (-17 pp). Respondents in Jordan are now much less likely to be optimistic than they were in the previous wave (-20 pp 'better').

**C3.5** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**Your life in general (%)**

	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	32	▼ 3	24	▲ 4	38	▼ 1	6	=
PS 	26	▲ 8	45	▲ 14	25	▼ 17	4	▼ 5
IL 	36	▲ 2	8	▲ 1	46	▼ 5	10	▲ 2
LB 	13	▼ 1	36	=	46	▲ 1	5	=
JO 	42	▼ 20	23	▲ 7	31	▲ 11	4	▲ 2

*Base: respondents Mashrek (N=4000)*

The socio-demographic analysis of the last three questions shows most differences occur between those who think things will be better and those who think they will remain the same. Highlights include:






- In the **Maghreb**, men are more likely than women to say their job situation (29% vs 23%) or life in general (25% vs 19%) will be the same. Women are more likely to say their life in general will be better (60% vs 54%). In the **Mashrek**, men are more likely than women to say their personal job situation will be better (28% vs 23%).
- In the **Maghreb**, those aged 55 or older are the most likely to say each of these things will be the same, and the least likely to say each of these things will be better. Those aged 25-39 are the most likely to say each of these items will be better. In the **Mashrek**, respondents aged 15-39 are more likely than older age groups to say each of these things will be better, especially compared to those aged 55 and over, while those aged 55 and over are more likely than younger age groups to say they will be the same.
- In **Maghreb** countries, respondents who completed education aged 16 or older are the most likely to say each of these aspects will be better. For instance, 65% of respondents who finished education when they were 16-19 years old think their life in general will be better, compared to 23% who think it will be worse. In the

**Mashrek** those who are still studying are also the most likely to say things will be better for all situations.






- In the **Maghreb**, managers and white-collar workers are the most likely to say each of these things will be better in the next 12 months. In the **Mashrek**, managers and students are the most likely to think this way.
- In the **Mashrek**, respondents with fewer financial difficulties are the most likely to be optimistic about each of these areas in the next 12 months.

## C3

What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? (% - **MAGHREB**)

	Your personal job situation			The financial situation of your household			Your life in general		
	Better	Worse	Same	Better	Worse	Same	Better	Worse	Same
MAGHREB	45	13	26	54	12	25	56	13	22
 Gender									
Male	46	14	29	52	13	27	54	14	25
Female	44	12	23	55	12	24	60	11	19
 Age									
15-24 years	42	14	25	53	13	25	56	14	22
25-39 years	50	14	25	57	11	25	61	13	19
40-54 years	48	13	25	54	13	25	57	13	22
55 years or more	36	8	31	47	11	27	49	9	29
 Education (End of)									
15-	45	11	26	51	13	24	52	14	22
16-19	52	10	26	59	9	27	65	7	23
20 or more	51	11	24	60	9	23	65	10	17
Still studying	43	12	23	55	13	24	59	14	19
 Occupation									
Self-employed	54	13	24	55	10	27	58	12	22
Managers	60	10	28	68	5	23	74	6	15
White collars	62	10	24	63	10	22	69	12	15
Manual workers	40	17	31	44	19	24	43	18	26
House persons	33	14	30	44	15	30	48	12	29
Unemployed	44	13	21	60	10	21	64	12	17
Retired	36	9	34	48	6	36	48	8	34
Students	41	12	24	54	13	25	58	13	21
 Difficulties paying bills									
Most of the time	48	16	22	54	15	23	57	16	19
From time to time	42	13	32	49	15	28	51	15	27
Almost never/ never	49	10	23	60	7	25	65	7	20

**C3** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? (% - **MASHREK**)

	Your personal job situation			The financial situation of your household			Your life in general		
	Better	Worse	Same	Better	Worse	Same	Better	Worse	Same
MASHREK	25	26	40	28	27	39	32	24	38
 <b>Gender</b>									
Male	28	27	38	28	28	39	33	25	36
Female	23	24	42	27	26	39	31	22	40
 <b>Age</b>									
15-24 years	31	28	30	33	28	32	38	24	31
25-39 years	31	26	35	32	28	33	37	26	31
40-54 years	21	25	47	24	29	42	28	24	43
55 years or more	13	22	56	17	23	53	20	20	53
 <b>Education (End of)</b>									
15-	16	40	35	20	41	33	22	39	34
16-19	26	23	42	29	24	40	32	20	40
20 or more	26	23	45	27	25	43	31	22	42
Still studying	31	25	29	34	27	31	41	22	30
 <b>Occupation</b>									
Self-employed	28	30	38	28	31	37	30	28	37
Managers	34	17	46	35	20	42	42	16	39
White collars	26	18	49	28	20	44	32	16	44
Manual workers	29	36	30	31	37	29	30	38	26
House persons	18	32	39	23	36	36	24	33	38
Unemployed	21	35	28	24	34	32	31	29	32
Retired	9	20	65	14	20	60	19	19	56
Students	33	24	30	34	26	32	42	20	30
 <b>Difficulties paying bills</b>									
Most of the time	18	36	36	23	42	30	28	35	31
From time to time	27	28	37	30	27	37	32	25	37
Almost never/ never	30	13	51	31	14	50	36	12	47

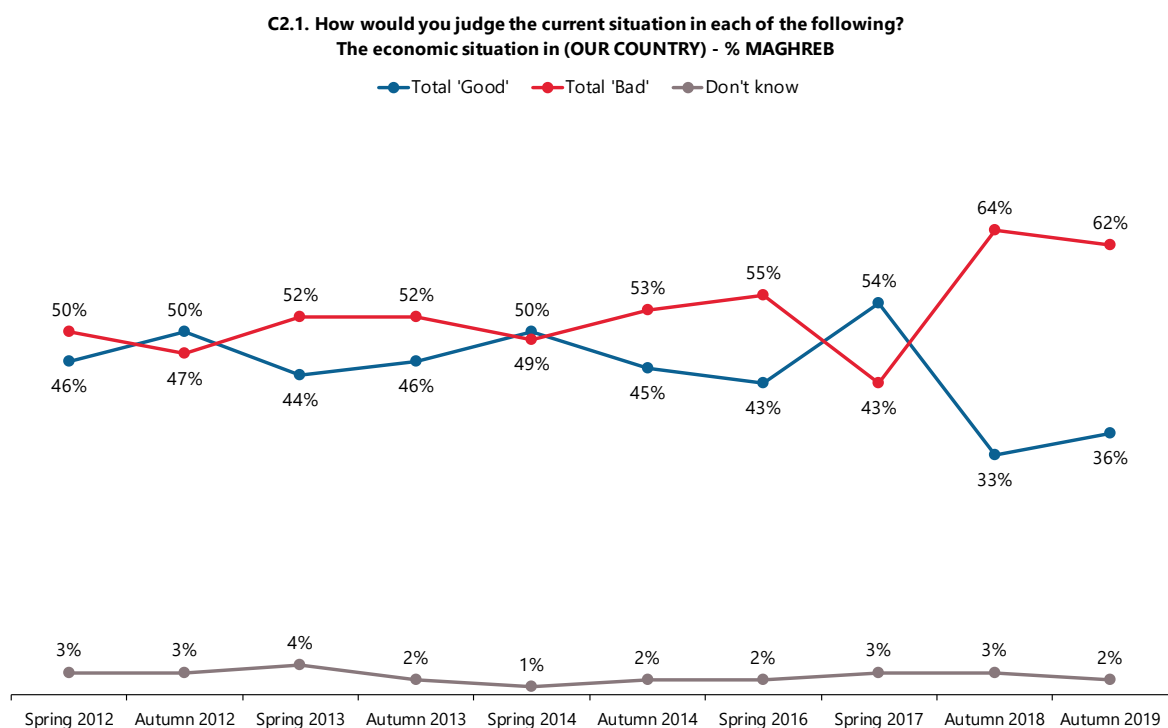


## 2. Perception of national situation

### National economic situation

More than six in ten respondents in both Maghreb (62%) and Mashrek (61%) countries say the current economic situation in their country is bad, with only minorities saying it is good (Maghreb: 36%, Mashrek: 37%)<sup>44</sup>.

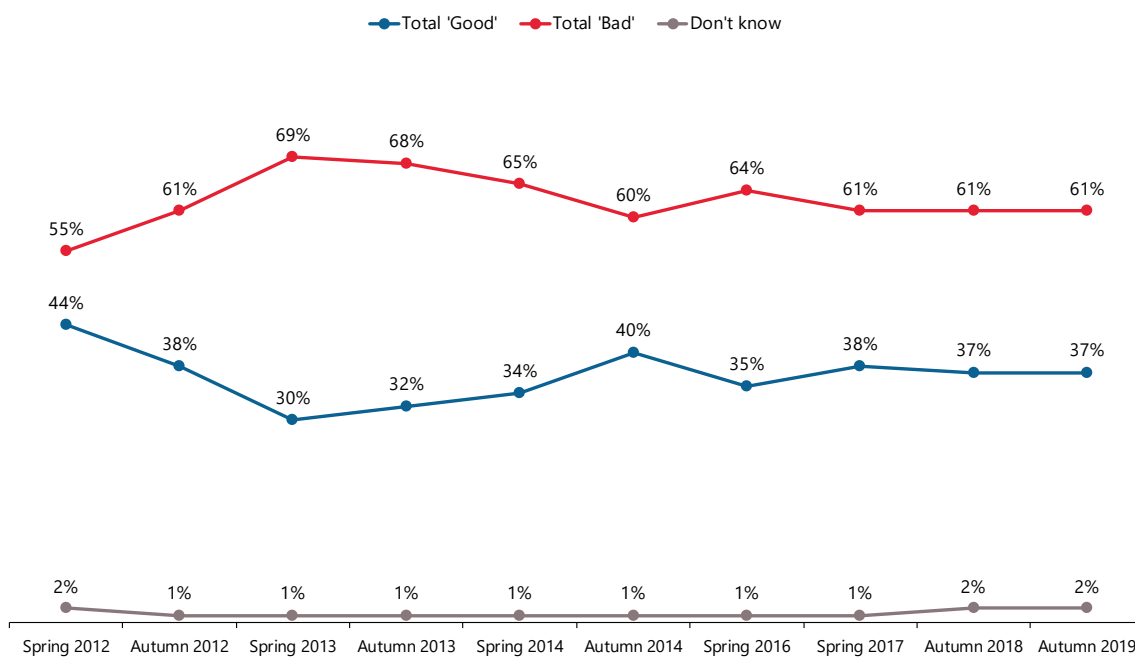
There has been no change in opinion in the Mashrek, and little change (2-3 pp) in Maghreb since Autumn 2018. Over the longer term, in the Maghreb the negative view remains considerably higher than in the period Spring 2012 – Spring 2017. In the Mashrek the results have remained relatively stable since Spring 2017, although the positive view is less common than it was at its peak in Spring 2012.



Base: respondents Maghreb (N=3085)

<sup>44</sup> C2.1 How would you judge the current situation in each of the following? The economic situation in (OUR COUNTRY)

**C2.1. How would you judge the current situation in each of the following?  
The economic situation in (OUR COUNTRY) - % MASHREK**






*Base: respondents Mashrek (N=4000)*

Morocco (62%) is the only country in the Maghreb where respondents are most likely to say the current economic situation in their country is good. In Tunisia (70%) and Algeria (78%) at least seven in ten say it is bad. In both Morocco (+12 pp 'good') and Tunisia (+11 pp 'good') respondents are now much more likely to have a positive view than they were in Autumn 2018. In Algeria on the other hand respondents have become less positive (-5 pp 'good', +8 pp 'bad').

**C2.1** How would you judge the current situation in each of the following?

**The economic situation in (OUR COUNTRY) (%)**





	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	36	▲ 3	62	▼ 2	2	▼ 1
MA 	62	▲ 12	36	▼ 12	2	=
TN 	25	▲ 11	70	▼ 12	5	▲ 1
DZ 	21	▼ 5	78	▲ 8	1	▼ 3

*Base: respondents Maghreb (N=3085)*

In the Mashrek, Israel (55% 'good') is the only country where the majority of respondents are positive about their country's current economic situation. In Lebanon (82%), Jordan (73%) and Palestine (66%) large majorities say the current economic situation in their country is 'bad'. Changes since Autumn 2018 are minor, with the largest a five-point drop in the proportion saying 'good' in Israel.

**C2.1** How would you judge the current situation in each of the following?

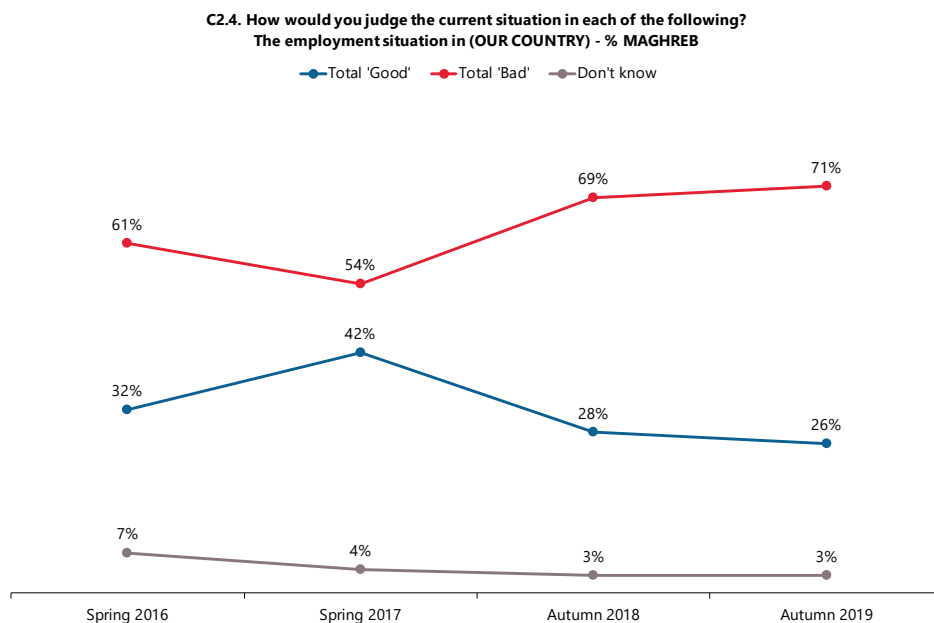
**The economic situation in (OUR COUNTRY) (%)**

	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	37	=	61	=	2	=
LB 	17	▲ 4	82	▼ 4	1	=
PS 	33	▲ 1	66	▲ 1	1	▼ 2
JO 	26	▼ 3	73	▲ 2	1	▲ 1
IL 	55	▼ 5	41	▲ 4	4	▲ 1

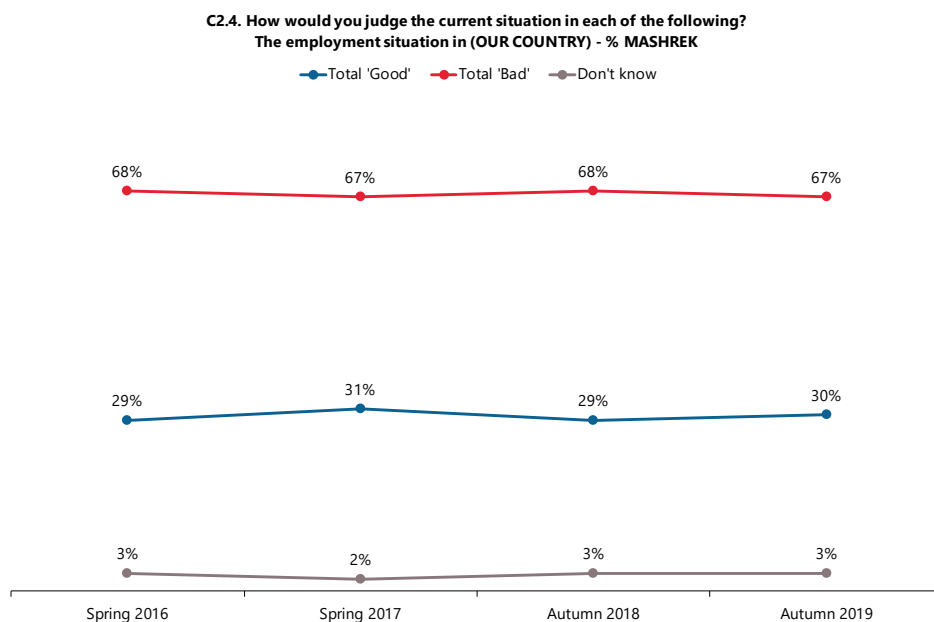
*Base: respondents Mashrek (N=4000)*

## National employment situation

More than two thirds of respondents in Maghreb (71%) and Mashrek (67%) think the current employment situation in their country is bad<sup>45</sup>. Three in ten (30%) in Mashrek and 26% in Maghreb think it is good. There has been little change in either group of countries since Autumn 2018. Over the longer term, the proportion in Maghreb who think their country's current employment situation is bad is at its highest ever point. In Mashrek results have been relatively stable since Spring 2016.



*Base: respondents Maghreb (N=3085)*






*Base: respondents Mashrek (N=4000)*

<sup>45</sup> C2.4 How would you judge the current situation in each of the following? The employment situation in (OUR COUNTRY)

In all three countries in the Maghreb, respondents most often say the current employment situation in their country is bad, with proportions ranging from 83% in Algeria to 56% in Morocco. However, those in Tunisia (-12 pp) and Morocco (-6 pp) are now less likely to think this way than they were in Autumn 2018, while the reverse is true in Algeria (+13 pp).



**C2.4** How would you judge the current situation in each of the following?  
**The employment situation in (OUR COUNTRY) (%)**

	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	26	▼ 2	71	▲ 2	3	=
TN 	25	▲ 12	70	▼ 12	5	=
MA 	41	▲ 5	56	▼ 6	3	▲ 1
DZ 	15	▼ 11	83	▲ 13	2	▼ 2

*Base: respondents Maghreb (N=3085)*

More than seven in ten respondents in Lebanon, Jordan (both 83%) and Palestine (74%) think the current employment situation in their country is bad. Respondents in Israel, on the other hand, are most likely to say it is good (50%). Changes since Autumn 2018 are generally small, with the largest a six-point increase in the proportion of respondents in Palestine who say the current economic situation in their country is bad.

**C2.4** How would you judge the current situation in each of the following?  
**The employment situation in (OUR COUNTRY) (%)**






	Total 'Good'	Aut. 2019 - Aut. 2018	Total 'Bad'	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	30	▲ 1	67	▼ 1	3	=
LB 	17	▲ 5	83	▼ 5	0	=
JO 	16	▲ 2	83	▼ 2	1	=
IL 	50	▼ 2	45	▲ 2	5	=
PS 	25	▼ 3	74	▲ 6	1	▼ 3

*Base: respondents Mashrek (N=4000)*






The socio-demographic analysis for the previous two questions illustrates the following:

- In the **Mashrek**, men are more likely to say the current economic (41% vs 33% of women) or employment situation (36% vs 25%) in their country is good.
- In the **Mashrek**, those aged 55 and older are more likely than younger respondents to say the current economic (46%) or employment (38%) situation is good.
- In the **Maghreb**, the earlier a respondent finished education, the more likely they are to say each of these situations is good. In Mashrek, on the other hand, those who completed education aged 16 or older are the most likely to be positive.
- In the **Maghreb**, house persons and students are the most likely to be positive about these two situations (along with the self-employed when it comes to the employment situation). In the **Mashrek**, on the other hand, managers and retired persons are the most likely to say the current economic and employment situations in their country are good.
- In the **Maghreb**, those who experience fewer financial difficulties are the most likely to say these situations are good. For example, 36% who experience the fewest difficulties say the economic situation in their country is good, compared to 28% who experience the most financial difficulties. In the **Mashrek** as well, the fewer financial difficulties a respondent experiences, the more likely they are to say the economic and employment situations in their country are good.

**C2** How would you judge the current situation in each of the following?  
(% - MAGHREB)

	The economic situation in (OUR COUNTRY)		The employment situation in (OUR COUNTRY)	
	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'
MAGHREB	36	62	26	71
 <b>Gender</b>				
Male	35	63	25	73
Female	37	61	27	70
 <b>Age</b>				
15-24 years	39	60	28	68
25-39 years	37	62	27	72
40-54 years	35	63	24	74
55 years or more	33	63	22	72
 <b>Education (End of)</b>				
15-	38	60	28	69
16-19	31	68	23	75
20 or more	28	72	19	80
Still studying	40	59	29	68
 <b>Occupation</b>				
Self-employed	37	62	30	69
Managers	23	77	14	86
White collars	31	68	22	77
Manual workers	35	61	26	70
House persons	42	55	30	66
Unemployed	35	64	24	73
Retired	29	69	15	84
Students	41	58	30	66
 <b>Difficulties paying bills</b>				
Most of the time	28	70	20	78
From time to time	40	59	28	70
Almost never/ never	36	63	26	72

**C2** How would you judge the current situation in each of the following?  
(% - MASHREK)

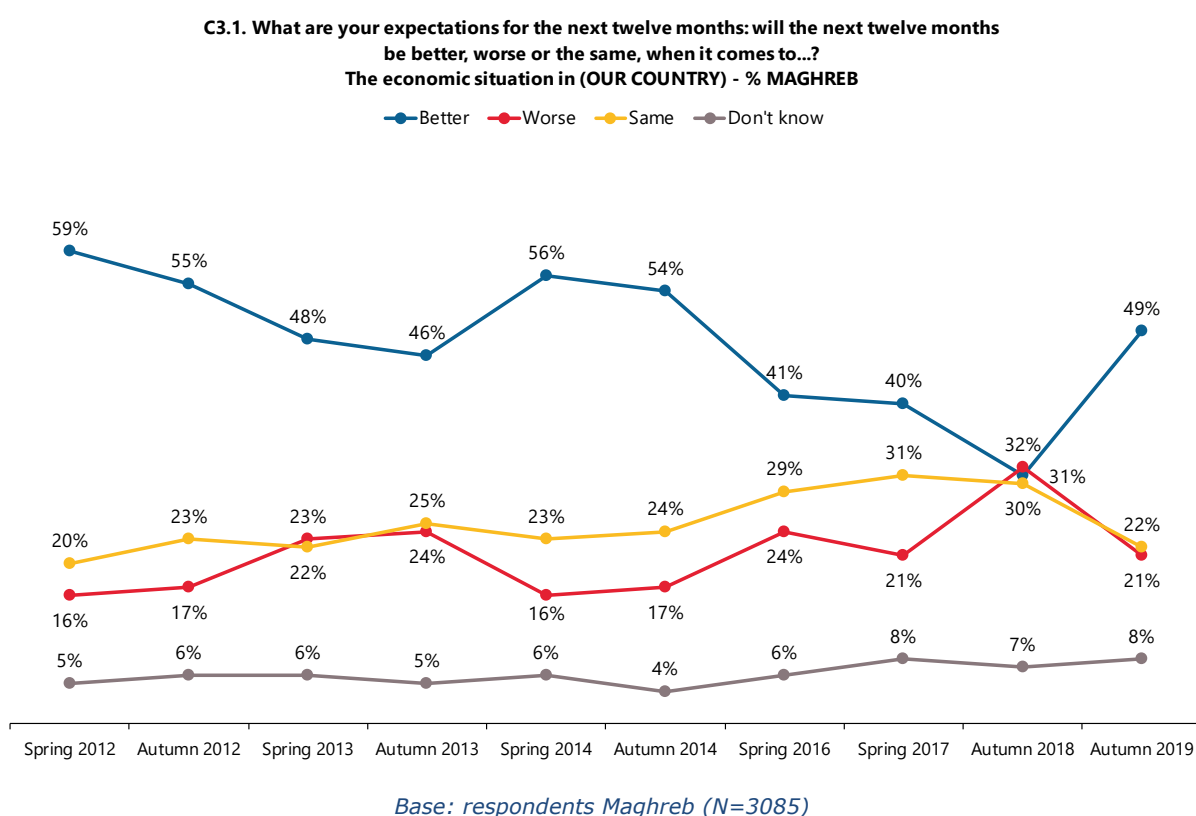
	The economic situation in (OUR COUNTRY)		The employment situation in (OUR COUNTRY)	
	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'
MASHREK	37	61	30	67
 Gender				
Male	41	57	36	61
Female	33	65	25	72
 Age				
15-24 years	33	63	25	71
25-39 years	34	64	28	69
40-54 years	36	63	33	66
55 years or more	46	52	38	59
 Education (End of)				
15-	19	80	15	83
16-19	40	57	34	63
20 or more	44	54	38	60
Still studying	30	67	21	74
 Occupation				
Self-employed	34	64	31	67
Managers	50	49	47	51
White collars	41	57	38	59
Manual workers	36	63	25	74
House persons	31	67	22	76
Unemployed	27	71	19	79
Retired	52	47	44	54
Students	33	63	24	71
 Difficulties paying bills				
Most of the time	23	76	17	81
From time to time	38	61	32	66
Almost never/ never	49	49	41	57



## Expectations for the national economic situation

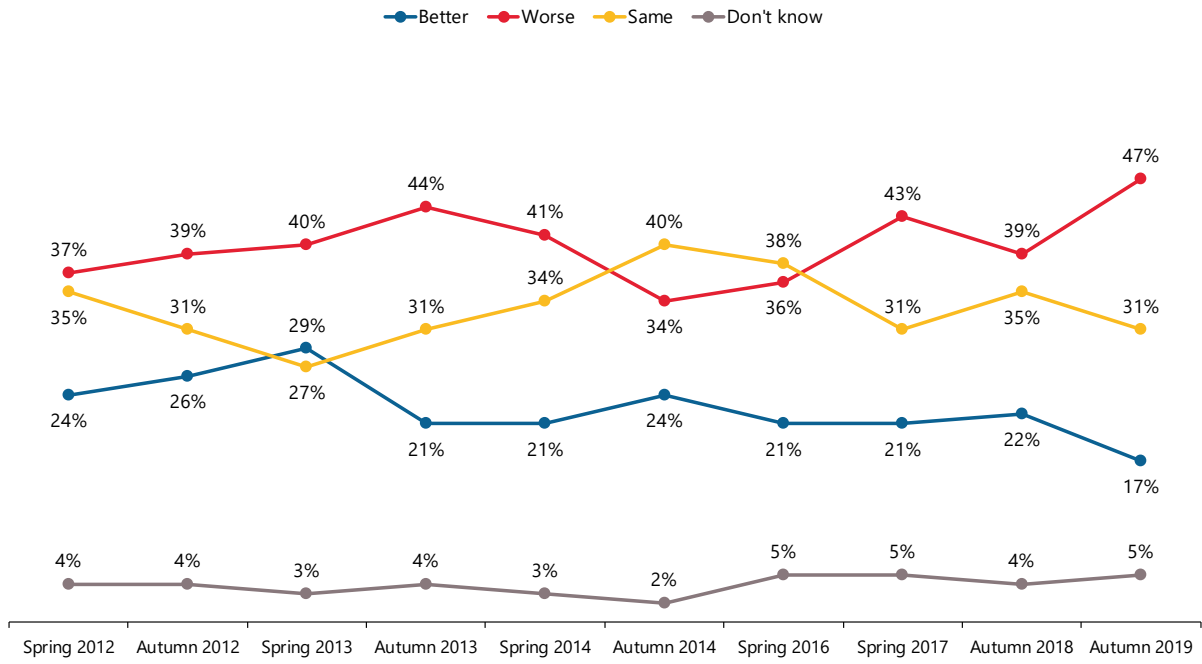
The differences in expectations for the economic situation in their country in the next 12 months between respondents in Maghreb and Mashrek countries are stark<sup>46</sup>. In the Maghreb 49% think it will be better, while 21% say it will be worse and 22% that it will be the same. In the Mashrek on the other hand, respondents are much more likely to think it will be worse (47%) or the same (31%) than to think the economic situation will be better (17%).

There have been notable changes in opinion in both groups of countries, compared to Autumn 2017. Those in the Maghreb are now more optimistic (+18 pp 'better', -11 pp 'worse'), while respondents in the Mashrek are now more pessimistic (+8 pp 'worse' and -5 pp 'better'). Over the longer term, respondents in Maghreb are now more optimistic than they have been since Spring 2016, although optimism is still lower than it was in 2012 or 2014. In Mashrek countries, on the other hand, apart from a dip in Autumn 2018, pessimism has been increasing since Autumn 2014. In fact, the proportion who say they think the economic situation in their country will get worse in the next 12 months is at an all-time high.



<sup>46</sup> C3.1 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? The economic situation in (OUR COUNTRY)

**C3.1. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?  
The economic situation in (OUR COUNTRY) - % MASHREK**






*Base: respondents Mashrek (N=4000)*

In the Maghreb, optimism prevails in Algeria (61% 'better') and Morocco (42% 'better'), while respondents in Tunisia are most likely to think the economic situation in their country will remain the same (35%). In all three countries respondents are now more likely to think the economic situation in their country will improve, although the increase in Algeria is by far the most dramatic (+33 pp 'better').

**C3.1** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**The economic situation in (OUR COUNTRY) (%)**





	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	49	▲ 18	21	▼ 11	22	▼ 8	8	▲ 1
DZ 	61	▲ 33	12	▼ 21	18	▼ 13	9	▲ 1
TN 	27	▲ 5	26	▼ 8	35	▼ 2	12	▲ 5
MA 	42	▲ 4	31	▲ 2	22	▼ 5	5	▼ 1

*Base: respondents Maghreb (N=3085)*

In Mashrek countries, respondents in Lebanon (63%), Palestine (59%) and Jordan (49%) most often say the economic situation in their country will get worse in the next 12 months, while those in Israel are most likely to say it will stay the same (42%). In every country except Lebanon, respondents are now more likely to say the situation will get worse than they were in Autumn 2018, with the largest increases in Israel and Palestine (both +14 pp).

**C3.1** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**The economic situation in (OUR COUNTRY) (%)**

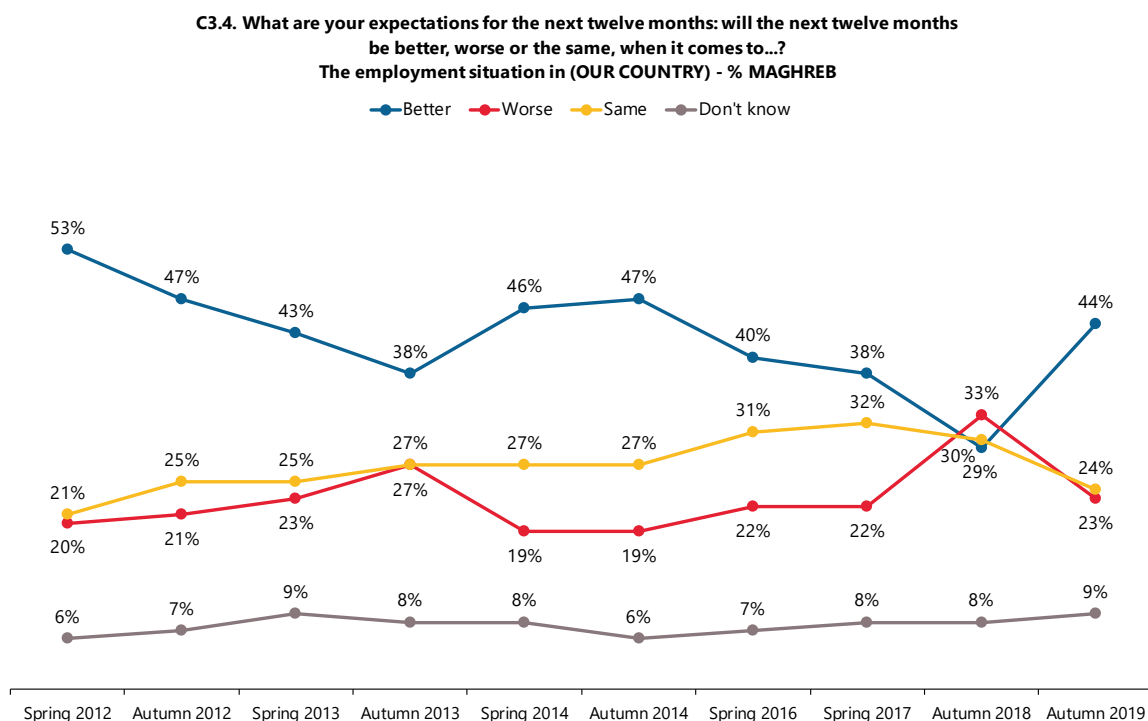
	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	17	▼ 5	47	▲ 8	31	▼ 4	5	▲ 1
PS 	19	=	59	▲ 14	18	▼ 14	4	=
LB 	9	=	63	▼ 3	26	▲ 4	2	▼ 1
IL 	15	▼ 4	34	▲ 14	42	▼ 12	9	▲ 2
JO 	23	▼ 12	49	▲ 9	25	▲ 2	3	▲ 1

*Base: respondents Mashrek (N=4000)*

## Expectations for the national employment situation

Views about the future economic situation are mirrored in those about the future employment situation – respondents in the Maghreb are most likely to think it will get better (44%), while those in Mashrek countries most often say it will get worse (45%)<sup>47</sup>. In Maghreb countries the proportion who think the situation will stay the same or get worse are similar (24% vs 23%). In the Mashrek, on the other hand, respondents are more likely to think the situation will remain the same (32%) than to say it will get better (16%).

After declining since Autumn 2014, the proportion of respondents in the Maghreb who are optimistic has increased considerably since Autumn 2018 (+14 pp). However, optimism remains lower than peak in Spring 2012. In the Mashrek the proportion who think the outlook positive is now at its lowest point, while the proportion who think the employment situation will be worse has increased seven points since Autumn 2018 and is now at its highest level.

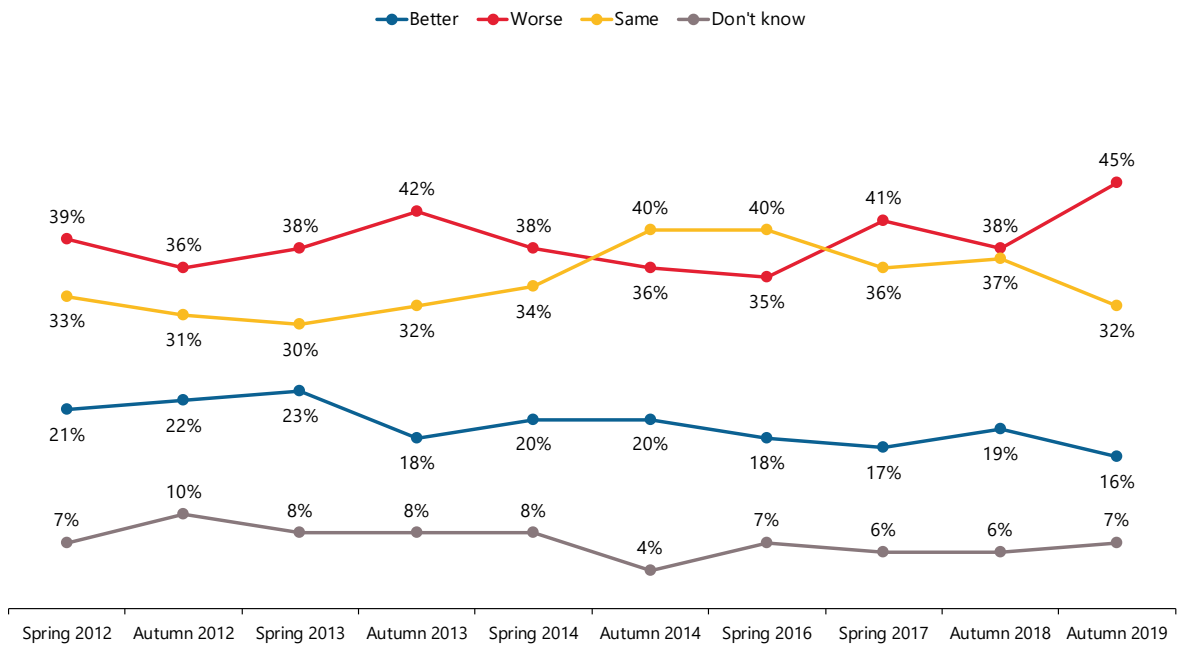


Base: respondents Maghreb (N=3085)

<sup>47</sup> C3.4 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? The employment situation in (OUR COUNTRY)

**C3.4. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?**

**The employment situation in (OUR COUNTRY) - % MASHREK**






*Base: respondents Mashrek (N=4000)*

In the Mashrek, the country picture is mixed. Respondents in Algeria are most likely to say they think the employment situation in their country will be better (58%), while those in Tunisia think it will be the same (37%) and opinion in Morocco is divided with 34% thinking it will be better and 34% that it will be worse. The optimistic view has increased since Autumn 2018 in all countries, but most notably in Algeria (+ 28 pp 'better').

**C3.4** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**The employment situation in (OUR COUNTRY) (%)**





	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MAGHREB	44	▲15	23	▼10	24	▼6	9	▲1
DZ 	58	▲28	14	▼17	19	▼12	9	▲1
TN 	26	▲4	24	▼7	37	▼2	13	▲5
MA 	34	▲3	34	▼4	25	▲1	7	=

*Base: Respondents Maghreb (N=3085)*

In Mashrek countries, the majority of respondents in every country except Israel think the economic situation in their country will be worse in the next 12 months, with the highest proportions in Lebanon and Palestine (both 59%). In Israel respondents are most likely to think the situation will stay the same (47%). Compared to Autumn 2018 the pessimistic view ('worse') has increased in every country except Lebanon, with the largest increase seen in Palestine (+17 pp).

**C3.4** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

**The employment situation in (OUR COUNTRY) (%)**

	Better	Aut. 2019 - Aut. 2018	Worse	Aut. 2019 - Aut. 2018	Same	Aut. 2019 - Aut. 2018	Don't know	Aut. 2019 - Aut. 2018
MASHREK	16	▼3	45	▲7	32	▼5	7	▲1
IL 	15	▲1	26	▲7	47	▼10	12	▲2
LB 	11	▲1	59	▼4	26	▲2	4	▲1
PS 	15	▼1	59	▲17	22	▼12	4	▼4
JO 	22	▼10	53	▲11	22	▼1	3	=







*Base: Respondents Mashrek (N=4000)*

The socio-demographic analysis for the last two questions shows no differences based on age, but does illustrate the following:

- In the **Maghreb**, men are more likely than women to think the economic situation will get worse (24% vs 18% of women). They are also more likely to think the employment situation will get worse (26% vs 20%) and less likely to think it will get better (40% vs 49% of women).
- In the **Maghreb**, those who completed education aged 16 or older are the most likely to think the employment situation will get better. In Mashrek countries, those who completed education aged 16 or older are the most likely to think the economic and employment situations will remain the same, while those who completed aged 15 or younger are the most likely to think they will get worse.
- In the **Maghreb**, those who live in small/mid-sized towns are the least likely to be optimistic about either situation.
- In the **Maghreb**, managers are the most likely to think each situation will get better (economic: 62%, employment: 62%).
- In both **Maghreb** and **Mashrek**, the more difficulties a respondent has paying bills, the more likely they are to think the economic and employment situations in their country will get worse.







**C3** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

(% - **MAGHREB**)

	The economic situation in (OUR COUNTRY)			The employment situation in (OUR COUNTRY)		
	Better	Worse	Same	Better	Worse	Same
MAGHREB	49	21	22	44	23	24
 <b>Gender</b>						
Male	47	24	22	40	26	27
Female	51	18	22	49	20	21
 <b>Age</b>						
15-24 years	46	23	24	40	24	26
25-39 years	50	22	23	46	24	24
40-54 years	51	21	21	47	24	22
55 years or more	48	18	18	44	19	22
 <b>Education (End of)</b>						
15-	49	20	18	44	20	23
16-19	54	17	25	52	19	24
20 or more	53	19	21	50	24	20
Still studying	50	22	22	41	23	27
 <b>Subjective urbanisation</b>						
Rural area or village	52	23	20	48	24	21
Small/mid size town	41	20	21	37	21	25
Large town	50	20	23	45	23	25
 <b>Occupation</b>						
Self-employed	49	22	21	39	24	27
Managers	62	14	21	62	18	16
White collars	55	20	21	52	24	22
Manual workers	36	28	25	32	28	27
House persons	44	21	26	40	25	24
Unemployed	56	17	19	56	19	18
Retired	52	18	19	48	17	26
Students	49	22	22	41	23	27
 <b>Difficulties paying bills</b>						
Most of the time	51	24	18	43	27	22
From time to time	47	21	26	42	24	28
Almost never/ never	53	18	21	51	20	20



**C3** What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?  
(% - MASHREK)

	The economic situation in (OUR COUNTRY)			The employment situation in (OUR COUNTRY)		
	Better	Worse	Same	Better	Worse	Same
MASHREK	17	47	31	16	45	32
 <b>Gender</b>						
Male	19	47	30	18	45	32
Female	15	47	31	14	45	33
 <b>Age</b>						
15-24 years	19	46	29	18	42	32
25-39 years	17	48	30	17	46	31
40-54 years	17	47	31	17	43	35
55 years or more	15	47	33	12	46	34
 <b>Education (End of)</b>						
15-	17	59	20	16	60	20
16-19	17	42	35	16	39	37
20 or more	18	49	29	16	46	33
Still studying	17	45	31	18	42	31
 <b>Subjective urbanisation</b>						
Rural area or village	14	46	33	16	43	32
Small/mid size town	17	50	28	16	48	30
Large town	18	45	32	16	43	35
 <b>Occupation</b>						
Self-employed	15	55	27	15	53	28
Managers	17	42	36	18	39	37
White collars	14	43	36	15	38	38
Manual workers	17	53	27	18	52	26
House persons	20	50	25	17	51	27
Unemployed	16	51	27	14	51	28
Retired	17	47	30	12	44	36
Students	19	43	32	19	39	34
 <b>Difficulties paying bills</b>						
Most of the time	16	53	26	14	55	26
From time to time	19	48	29	19	46	30
Almost never/ never	17	42	36	16	35	41

### 3. Issues facing the country

There are a range of differences between respondents in Maghreb and Mashrek countries when it comes to their opinions about the most important issues facing their country<sup>48</sup>.

In the Maghreb, the most mentioned issues are corruption (65%), unemployment (64%), rising prices/inflation (45%), crime (43%) and housing (42%). In the Mashrek, on the other hand, the most mentioned issues are the economic situation (62%), unemployment (51%) rising prices/inflation (48%) and corruption (44%).

The prominence of issue relating to the economy and employment in both groups of countries is not surprising, given that in both Maghreb and Mashrek countries the majority think the current economic and employment situations are bad.

However, as was the case in Autumn 2018, the proportion of respondents in the Maghreb who consider the economic situation one of the most important issues facing their country is much lower than the proportion of respondents in the Mashrek who say this is one of the most important issues (39% vs. 62% in the Mashrek).

Respondents in the Maghreb are more likely than their counterparts in the Mashrek to consider a number of these issues as important: corruption (65% vs 44%), unemployment (64% vs 51%), crime (43% vs 22%), housing (42% vs 23%), the healthcare system (37% vs 25%), the educational system (37% vs 23%), migration (36% vs 13%), freedom of speech (25% vs 12%), the environment (21% vs 11%) and energy (15% vs 8%).

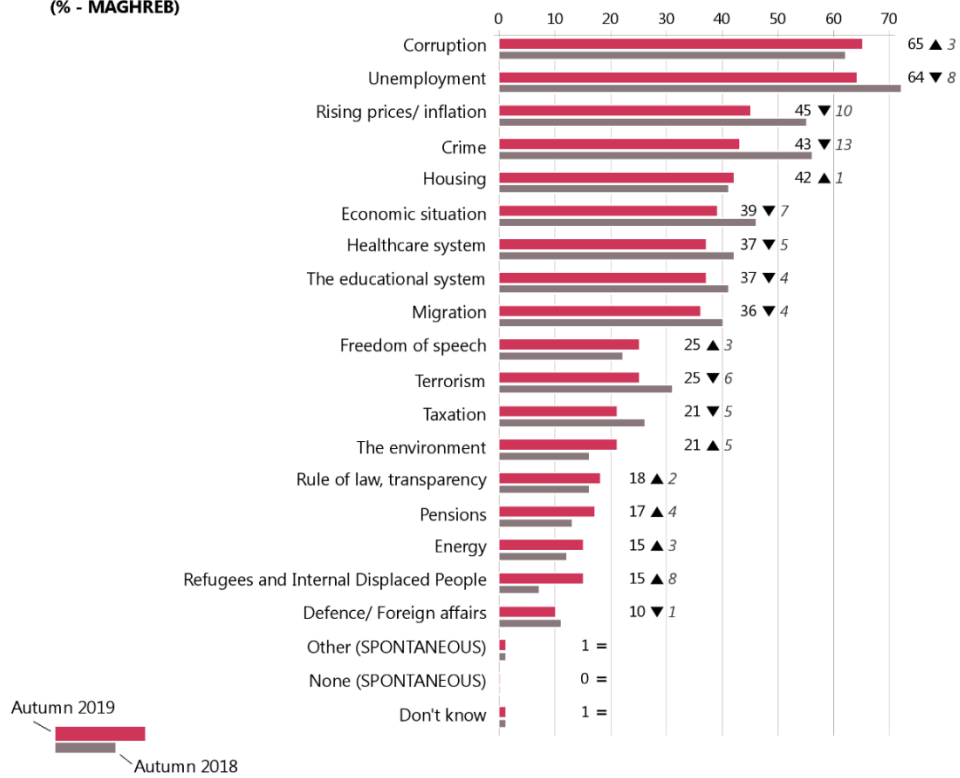
Respondents in Mashrek countries are more likely to mention the economic situation (62% vs 39%), as mentioned previously, or defence/foreign affairs (23% vs 10% in Maghreb).

Respondents in the Maghreb are now more likely to mention refugees and internally displaced people (+8 pp) and the environment (+5 pp) than they were in Autumn 2018, but they are less likely to mention crime (-13 pp), rising prices/inflation (-10 pp), unemployment (-8 pp), the economic situation (-7 pp) or terrorism (-6 pp). Changes in Mashrek countries are generally smaller, with the largest a six-point increase in mentions of the economic situation and a six-point decrease in the mentions of refugees and internally displaced people.

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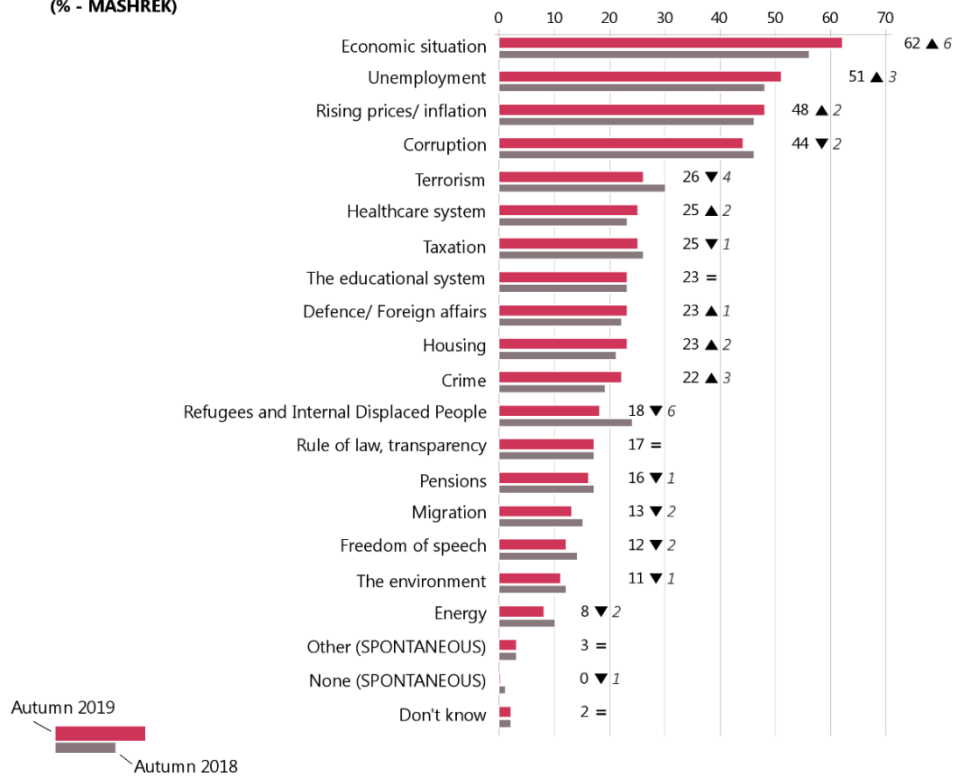
<sup>48</sup> C4T What do you think is the most important issue facing (OUR COUNTRY) at the moment? Firstly? And then?

**C4T** What do you think is the most important issue facing (OUR COUNTRY) at the moment? Firstly? And then?  
(MULTIPLE ANSWERS POSSIBLE)  
(% - **MAGHREB**)



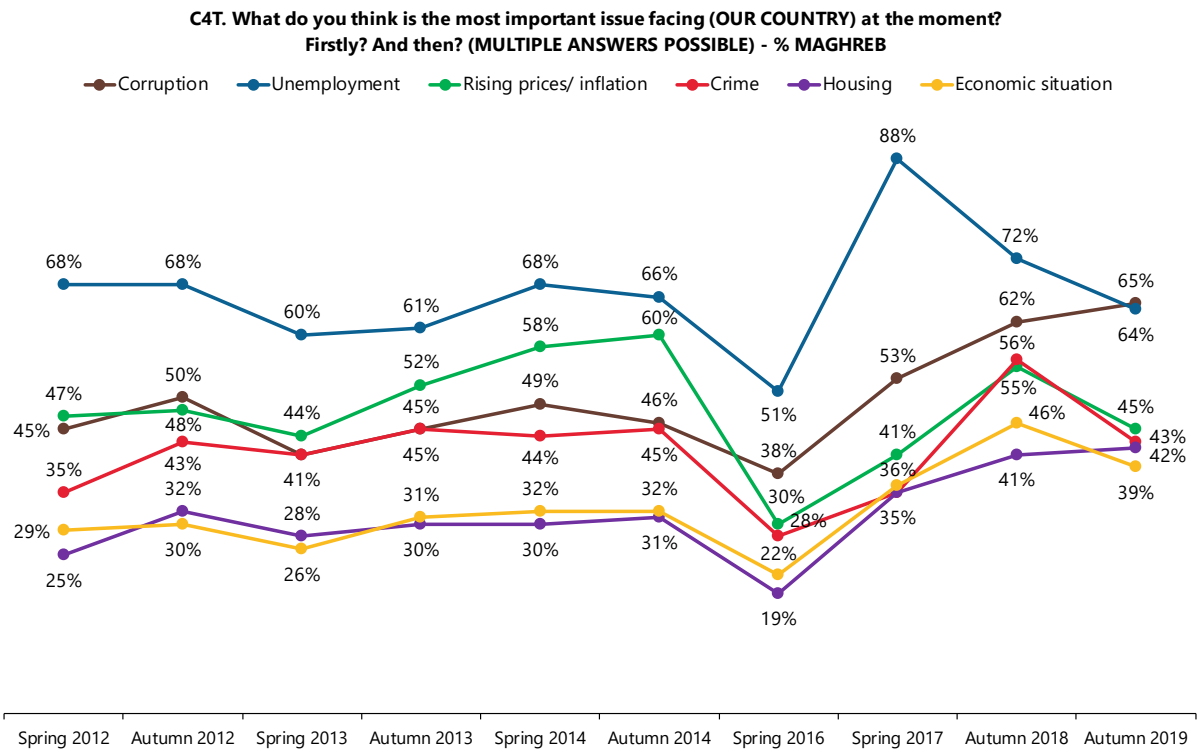
Base: respondents Maghreb (N=3085)

**C4T** What do you think is the most important issue facing (OUR COUNTRY) at the moment? Firstly? And then?  
(MULTIPLE ANSWERS POSSIBLE)  
(% - **MASHREK**)



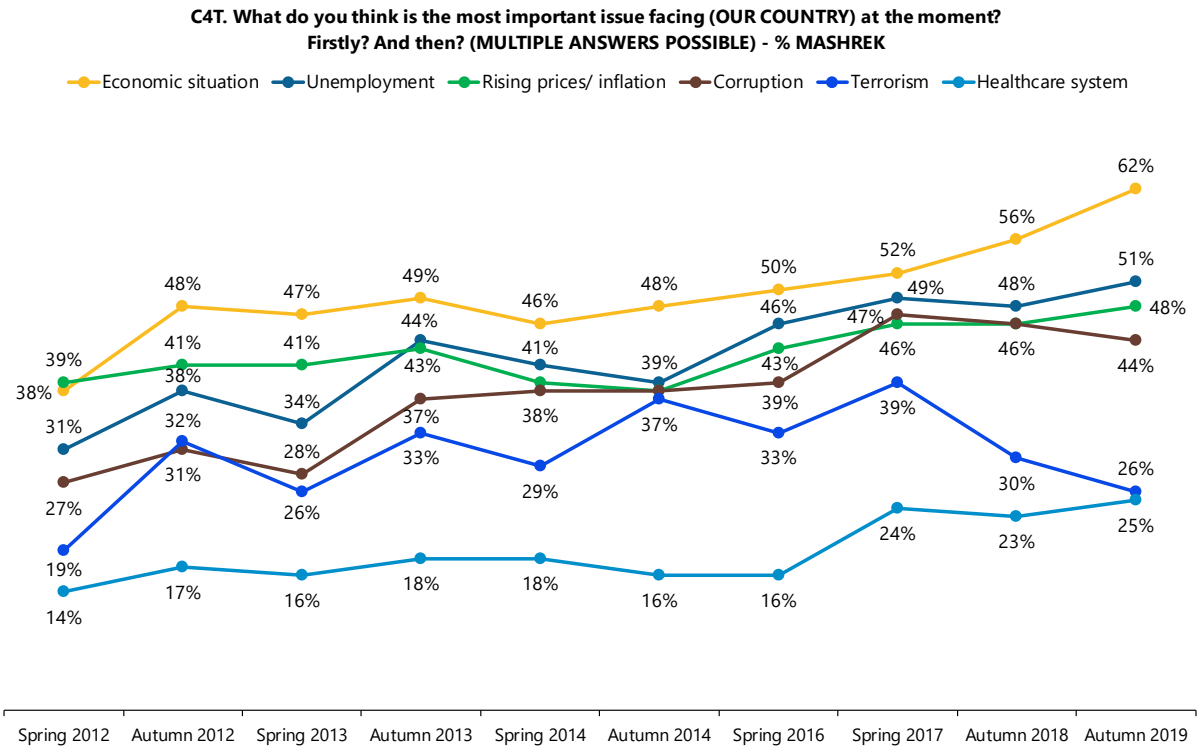
Base: respondents Mashrek (N=4000)

Over the longer term in the Maghreb, after a peak in Spring 2017, mentions of unemployment have returned to a level similar to Autumn 2014. Mentions of corruption have been increasing since Spring 2016 and are now at their highest level. Rising prices/inflation are less of a concern than they were between Autumn 2013 and Autumn 2014, while mentions of housing is at its highest level. Despite a decline since Autumn 2018, the economic situation remains more of a concern than the period from Spring 2012 to Spring 2017.



Base: respondents Maghreb (N=3085)

In Mashrek countries, mentions of the economic situation have generally been increasing, and particularly since Spring 2016. Broadly speaking mentions of unemployment, rising prices/inflation, and the healthcare system have also been increasing over the longer term. Mentions of corruption have slightly decreased since Autumn 2018, though mentions of this item remain higher than the period between Spring 2012 and Spring 2016. The importance of terrorism has declined, and is now at its lowest point since Spring 2014






Base: respondents Mashrek (N=4000)

The country analysis focusses on the eight most mentioned issues. In Maghreb countries, unemployment is the most mentioned issue in Morocco (70%) and Tunisia (66%), while corruption is the most mentioned in Algeria (70%). Rising prices and inflation are mentioned by the majority in Tunisia (58%) and Morocco (50%), but by fewer respondents in Algeria (37%). Respondents in Morocco are much more likely to mention crime (56%), the healthcare system or the education system (both 53%) than those in other countries. Respondents in Tunisia are much less likely than those in other countries to mention housing as an important issue (6%).

Compared to Autumn 2018, respondents in all three countries are now less likely to mention unemployment, rising prices/inflation or the economic situation. These are the only consistent trends across countries.





**C4T** What do you think is the most important issue facing (OUR COUNTRY) at the moment? Firstly? And then?  
(MULTIPLE ANSWERS POSSIBLE)  
(%)

	Corruption	Aut. 2019 - Aut. 2018	Unemployment	Aut. 2019 - Aut. 2018	Rising prices/ inflation	Aut. 2019 - Aut. 2018	Crime	Aut. 2019 - Aut. 2018	Housing	Aut. 2019 - Aut. 2018	Economic situation	Aut. 2019 - Aut. 2018	Healthcare system	Aut. 2019 - Aut. 2018	The educational system	Aut. 2019 - Aut. 2018
MAGHREB	65	▲ 3	64	▼ 8	45	▼10	43	▼13	42	▲ 1	39	▼ 7	37	▼ 5	37	▼ 4
MA 	64	▲ 2	70	▼14	50	▼ 7	56	=	41	▼ 7	34	▼ 7	53	▼ 6	53	▼10
DZ 	70	▲ 7	60	▼ 5	37	▼16	37	▼23	52	▲ 7	41	▼ 9	30	▼ 6	29	▼ 2
TN 	51	▼ 9	66	▼ 2	58	▼ 1	31	▼10	6	▼ 6	46	▼ 1	22	▲ 5	21	=

*Base: respondents Maghreb (N=3085)*

In the Maghreb, the economic situation is seen as the most important issue by respondents in Israel (54%) and Lebanon (71%), while unemployment is the most mentioned in Jordan (74%) and Palestine (66%). Respondents in Israel are much less likely to mention unemployment (21%) than those in the other countries, but they are much more likely to mention defence/foreign affairs (51%). There are no consistent trends across all countries.

**C4T** What do you think is the most important issue facing (OUR COUNTRY) at the moment? Firstly? And then?  
(MULTIPLE ANSWERS POSSIBLE)  
(%)

	Economic situation Aut. 2019 - Aut. 2018	Unemployment Aut. 2019 - Aut. 2018	Rising prices/ inflation Aut. 2019 - Aut. 2018	Corruption Aut. 2019 - Aut. 2018	Terrorism Aut. 2019 - Aut. 2018	Healthcare system Aut. 2019 - Aut. 2018	Taxation Aut. 2019 - Aut. 2018	The educational system Aut. 2019 - Aut. 2018	Defence/ Foreign affairs Aut. 2019 - Aut. 2018	Housing Aut. 2019 - Aut. 2018
MASHREK	62 ▲6	51 ▲3	48 ▲2	44 ▼2	26 ▼4	25 ▲2	25 ▼1	23 =	23 ▲1	23 ▲2
IL 	54 ▲16	21 =	46 ▲11	49 ▼1	47 ▼6	46 ▲6	25 ▲3	44 ▲5	51 ▲1	44 ▲3
JO 	67 ▲5	74 ▲17	54 =	38 ▼7	4 ▼18	5 ▲1	22 ▲1	6 ▲1	1 ▼1	3 ▲2
LB 	71 ▲3	68 ▼4	55 ▲3	48 ▼8	21 ▼5	23 ▼6	27 ▼10	18 ▼3	6 ▼7	20 ▼8
PS 	61 ▼5	66 ▲8	37 ▼10	39 ▲5	21 ▲11	13 ▼8	26 ▼4	10 ▼11	12 ▼2	10 =

Base: respondents Mashrek (N=4000)

The socio-demographic analysis focusses on the four most mentioned issues in each group of countries. In the **Maghreb**, the analysis shows no notable differences based on gender or age. It does show that those who completed education aged 15 or younger or who are still studying (47%) and those living in rural villages (49%), and those who experience more difficulties paying bills (46%-47%) are the most likely to say rising prices/inflation are important issues. Housepersons are the most likely to mention unemployment (74%), rising prices/inflation (53%) and crime (56%).

There are more differences in the **Mashrek**:

- Women are more likely than men to say rising prices/inflation is an important issue (51% vs 45%).
- Respondents aged 15-39 are the most likely to mention unemployment, while those aged 55+ are the most likely to mention corruption (50%).
- Respondents who completed education aged 15 or younger are the most likely to mention the economic situation (71%), unemployment (69%) or rising prices/inflation (53%), but the least likely to mention corruption (31%).
- Unemployed people (67%) and house persons (65%) are the most likely to mention unemployment, while retired persons are the most likely to mention corruption (56%).

- Respondents who experience the most financial difficulties are the most likely to mention the economic situation (68%), unemployment (62%) or rising prices/inflation (54%), but the least likely to mention corruption (42%).

**C4T** What do you think is the most important issue facing (OUR COUNTRY) at the moment? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
(% - **MAGHREB**)

	Crime	Rising prices/ inflation	Unemployment	Corruption
MAGHREB	43	45	64	65
<b>Gender</b>				
Male	41	44	63	63
Female	45	46	66	67
<b>Age</b>				
15-24 years	40	44	63	62
25-39 years	44	43	66	66
40-54 years	42	46	63	65
55 years or more	47	48	65	68
<b>Education (End of)</b>				
15-	44	47	66	66
16-19	41	39	64	68
20 or more	40	40	62	70
Still studying	43	47	65	62
<b>Subjective urbanisation</b>				
Rural area or village	49	49	68	65
Small/mid size town	38	44	65	69
Large town	41	42	62	64
<b>Occupation</b>				
Self-employed	35	40	60	64
Managers	41	40	62	69
White collars	35	40	58	71
Manual workers	49	47	63	65
House persons	56	53	74	66
Unemployed	38	40	65	64
Retired	43	50	63	64
Students	44	48	66	62
<b>Difficulties paying bills</b>				
Most of the time	43	47	62	62
From time to time	47	46	70	65
Almost never/ never	39	39	59	66

**C4T** What do you think is the most important issue facing (OUR COUNTRY) at the moment? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
(% - **MASHREK**)

	Economic situation	Rising prices/ inflation	Unemployment	Corruption
MASHREK	62	48	51	44
<b>Gender</b>				
Male	61	45	50	44
Female	62	51	53	44
<b>Age</b>				
15-24 years	60	44	58	41
25-39 years	60	53	55	41
40-54 years	65	49	49	45
55 years or more	61	46	40	50
<b>Education (End of)</b>				
15-	71	53	69	31
16-19	61	48	48	46
20 or more	60	47	45	48
Still studying	59	45	56	42
<b>Subjective urbanisation</b>				
Rural area or village	59	46	49	46
Small/mid size town	61	49	56	44
Large town	63	49	49	43
<b>Occupation</b>				
Self-employed	63	44	59	45
Managers	58	46	38	45
White collars	63	51	38	47
Manual workers	58	53	52	42
House persons	62	54	65	37
Unemployed	64	43	67	41
Retired	63	47	33	56
Students	59	44	55	43
<b>Difficulties paying bills</b>				
Most of the time	68	54	62	42
From time to time	61	46	54	45
Almost never/ never	59	44	41	46



## CONCLUSION

The results of the latest wave of this survey show that opinion about the European Union is diverging in Mashrek and Maghreb countries. In the Mashrek, the majority have a positive view of the EU, and this has increased five points since the last wave. The majority also trust the EU, with trust increasing six points in the same period. In the Maghreb, however, although a large minority have a positive view of the EU, this represents a decline of nine percentage points since Autumn 2018. The proportion who trust the EU has declined even more (-12 pp), with just over four in ten now saying they trust the EU. a

Despite this, as was the case in the previous wave, the majority of respondents in both groups of countries think the EU is an important partner that has sufficient common values to be able to cooperate with their country. Respondents in the Maghreb are, however, much more likely than those in the Mashrek to say the EU is their country's closest partner. Although the majority in both groups of countries say the relationship between the EU and their country is good, respondents in Maghreb are now much less likely to think this way (-11 pp).

Around half in both groups of countries think the support of the EU contributes a lot to the development of their country, with tourism, trade and economic development areas most often mentioned as having benefited from EU support. In fact, the majority in both Maghreb and Mashrek countries think the EU should have a greater role to play in their country in a range of areas, especially trade, economic development and human rights. Supporting these results is the fact that the majority in both Maghreb and Mashrek countries think the EU has a positive influence on the development of their country – although this view is more widely held in the Mashrek.

Although the European Union provides funding to support a wide range of programmes in Southern Neighbourhood countries, only a minority are aware of this, with awareness considerably higher in the Mashrek. Respondents in Mashrek countries have also become more positive about the effectiveness of this support – although the majority in both Mashrek and Maghreb countries who are aware of this funding say it is effective.

Low awareness of EU funding may be linked to the fact that fewer than one in ten in either group of countries has been personally involved in an EU funded project, except for Palestine (11%) and Israel (12%). It may also be related to the fact that only a minority in Maghreb feel well informed about the European Union, and even in the Mashrek only a slight majority say they feel well-informed. This pattern is repeated for those who look for information about the EU – just over four in ten in Maghreb and half in Mashrek countries. Only a small minority in either group of countries have visited EU websites or social media pages. However, it is interesting to note that respondents in the Mashrek would be much more likely to turn to the EU's official website Europa or the official delegation website in their country to find information, compared to those in Maghreb.

For respondents who do seek information, it is most likely to be economic or financial in nature. Respondents who do look for information are usually successful in finding it, although respondents in Maghreb are now much less likely to say this than they were in Autumn 2018 (-13 pp).

The results highlight once again that a positive opinion of the EU, a belief in good EU-national relations, and feeling well informed about the EU are consistently linked with more positive attitudes and opinions about the EU. In both groups of countries, it is also often the case that having relatives in the EU is also linked with more positive opinions.

Respondents in both Maghreb and Mashrek countries are generally satisfied with their life, and positive about current personal job and financial situations. The exception is the Maghreb, where optimism about the current personal job situation has fallen 14 points since Spring 2017. When it comes to the future, however, respondents in the Maghreb are increasingly optimistic, and much more likely to be optimistic that each of these things will get better in the next 12 months than those in the Mashrek.

Turning to perceptions of the national outlook, the majority in both groups of countries say the current economic and employment situations in their country is bad, but respondents in the Maghreb are much more likely to be optimistic these things will improve in the next 12 months. Not only are respondents in the Maghreb more optimistic about the future in these areas - their optimism has increased. The reverse is true in the Mashrek, where respondents are most likely pessimistic about the future and have become more so since the last wave.

There are also differences between the two groups of countries when it comes to media usage. In Maghreb television is the most trusted and relied on for political news, while in the Mashrek social media and the Internet are most relied on, and the Internet the most trusted. However, irrespective of the media type respondents in Maghreb and Mashrek countries are most likely to think the EU has a positive image in the national media.

The picture emerging from these results once again confirms the importance of the general aim of CSP South to increase understanding of European policies and the support the EU provides partner countries in the southern Neighbourhood area, particularly as this understanding is linked to more positive opinions about the EU. They also show a clear and continuing need for information campaigns about the EU and EU programmes, as well as the importance of adopting a mixed-media approach to meet the different media consumption habits of individual countries.