



# **An Ipsos Poll of Arab World Perceptions of the United States of America and President Barack Obama**

*May, 2009*

Nobody's Unpredictable



# Ipsos MENA and Ipsos

- ❑ *Ipsos MENA is part of the Ipsos group of companies and operates in the Middle East and North Africa.*
- ❑ *Ipsos is the second largest global survey-based market research company, owned and managed by research professionals that help interpret, simulate, and anticipate the needs and responses of consumers, customers, and citizens around the world. Its experts assess market potential and interpret market trends to develop and test emergent or existing products or services, and build brands; test advertising and study audience responses to various media; and, measure public opinion around the globe. With over 9,000 employees working in wholly owned operations in 64 countries, Ipsos conducts advertising, customer loyalty, marketing, media, and public affairs research, as well as forecasting, modeling, and consulting and a full line of custom, syndicated, omnibus, panel, and online research products and services in over 100 countries. Founded in 1975 by Jean-Marc Lech and Didier Truchot, Ipsos has been publicly traded since 1999.*
- ❑ *In 2008, Ipsos' revenues totaled €979.3 million, an increase of 5.6% on 2007. Listed on Eurolist by NYSE - Euronext Paris, Ipsos is part of the SBF 120 and the Mid-100 Index and is eligible to the Deferred Settlement System.*



# Ipsos MENA

Ipsos MENA covers 18 countries in the Middle East

- Kingdom of Saudi Arabia - KSA
- United Arab Emirates - UAE
- Kuwait
- Egypt
- Lebanon
- Jordan
- Syria
- Bahrain
- Morocco
- Qatar
- Oman
- Yemen
- Sudan
- Algeria
- Iraq
- Iran
- Pakistan
- Palestinian Territories

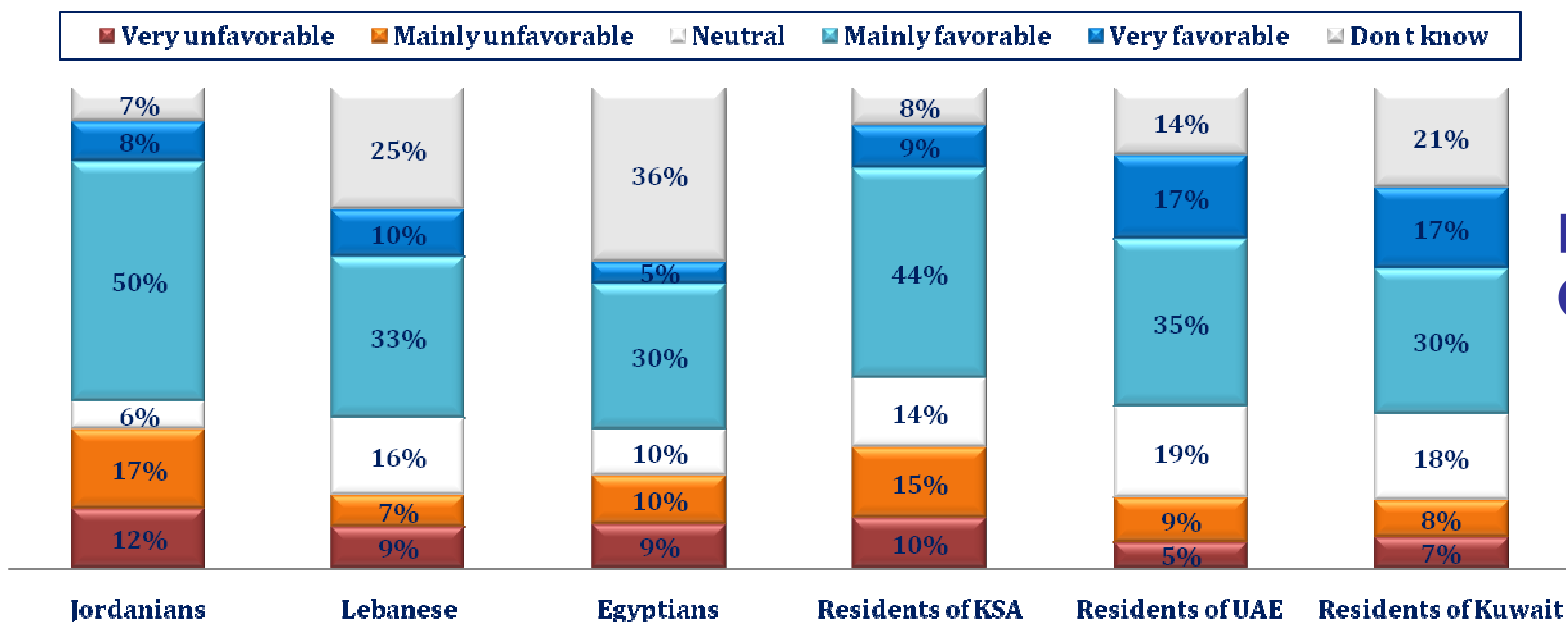
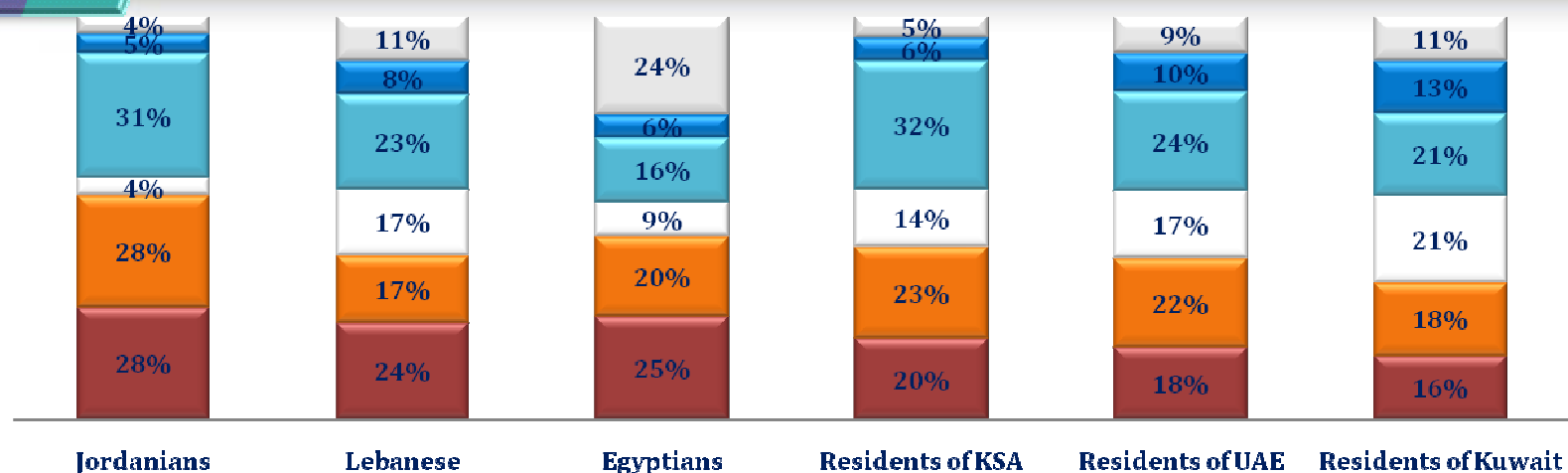


# Summary Points

- The Ipsos MENA Poll is unequivocal in showing that President Barack Obama is a very credible messenger in the Arab World. Indeed, those in the Middle East see President Obama in a much more favorable light than the United States in general, indicating a central role for the President in pushing a new agenda in the region.
- Additionally, majorities (or near majorities) in each of the countries polled believe President Obama will positively impact their country, the U.S. and the World.
  - This sentiment is especially strong among Jordanians.
  - In contrast, Egyptians show the greatest doubt about President Obama.
- Taken as a whole, the results suggest that the newly elected President has substantial “good will” among the countries polled.



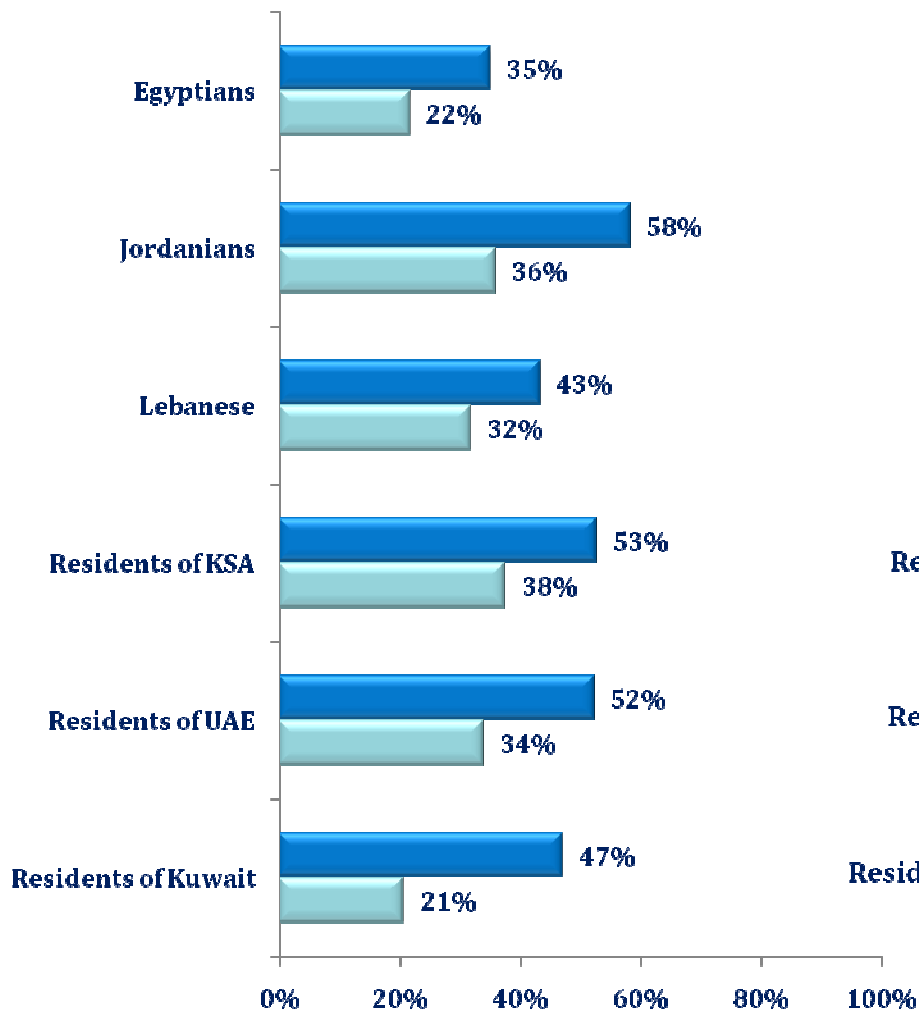
# Overall Opinion/ Impression Towards Unites States VS US President Barack Obama



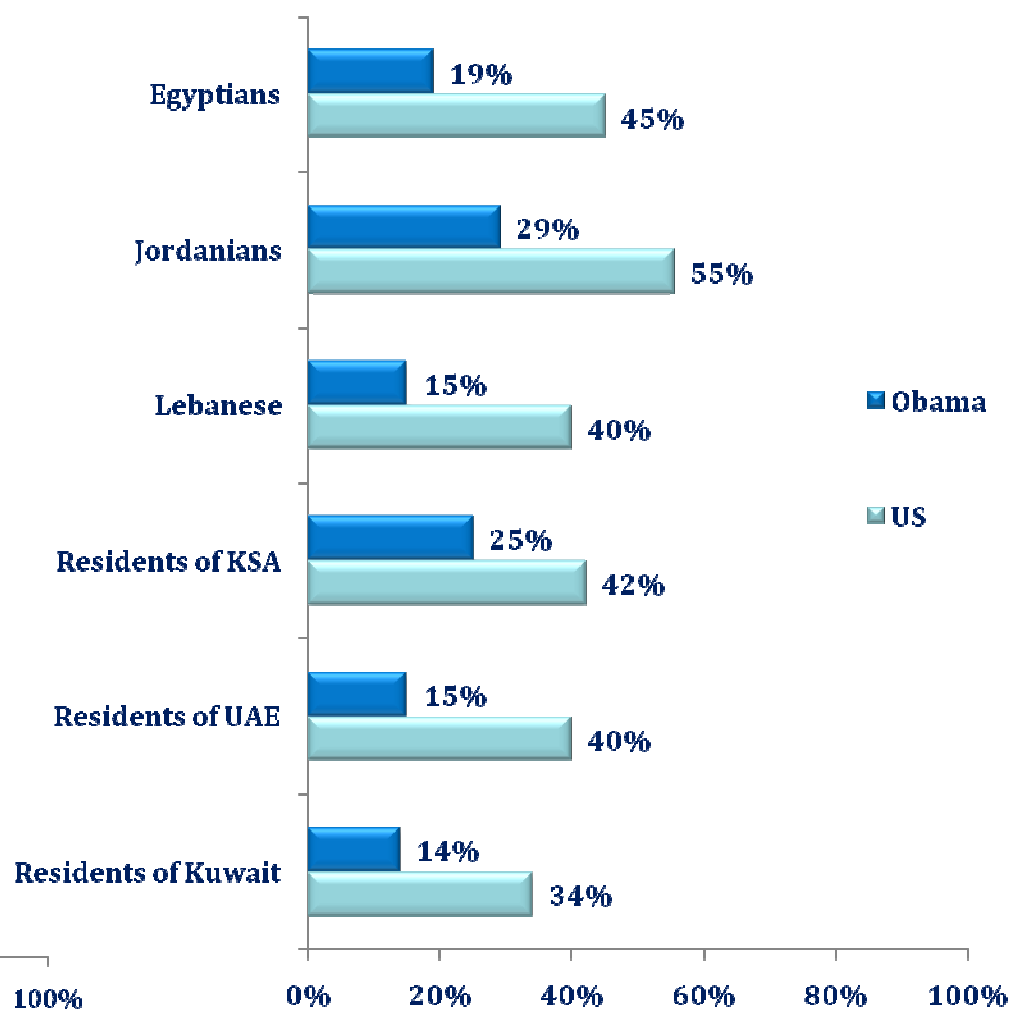


# Overall Opinion/ Impression towards Unites States VS US President Barack Obama (Top 2 VS Bottom 2)

Top 2 Boxes (Very Favorable & Mainly Favorable)



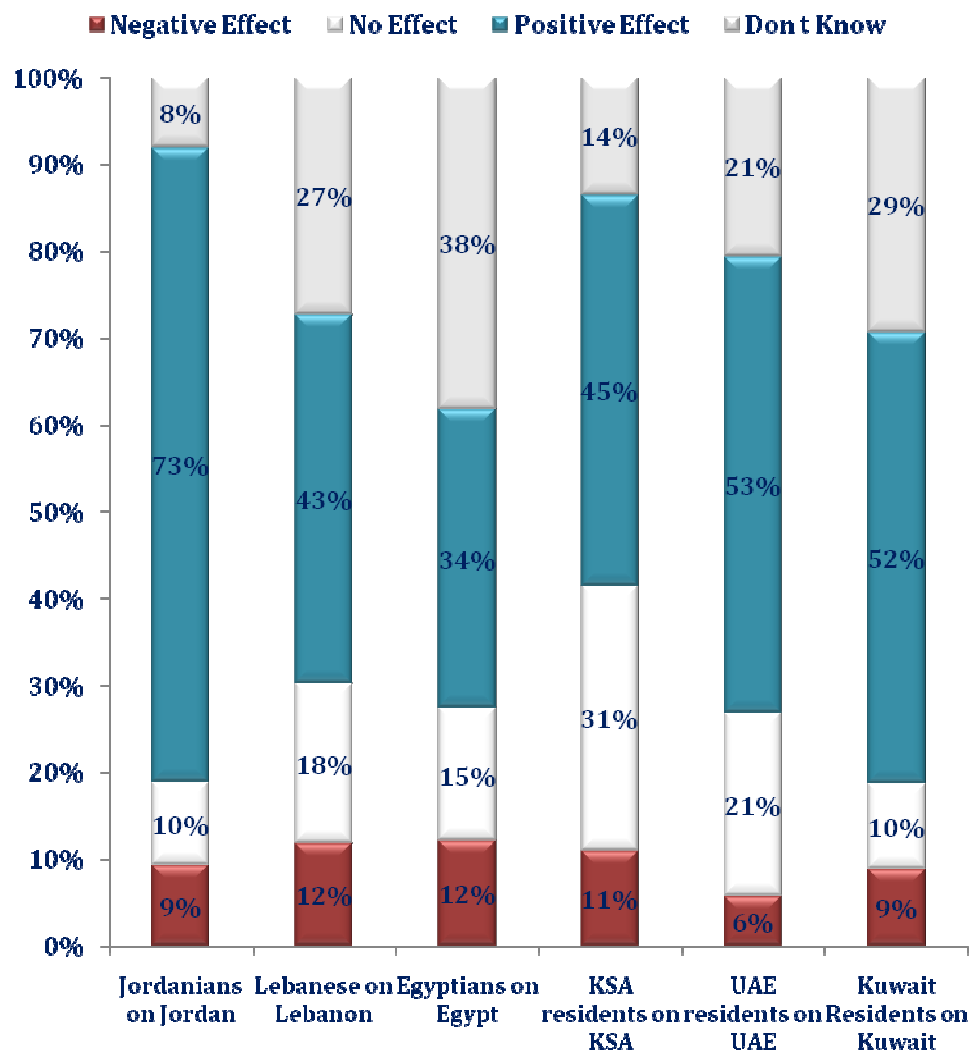
Bottom 2 Boxes (Very Unfavorable & Mainly Unfavorable)



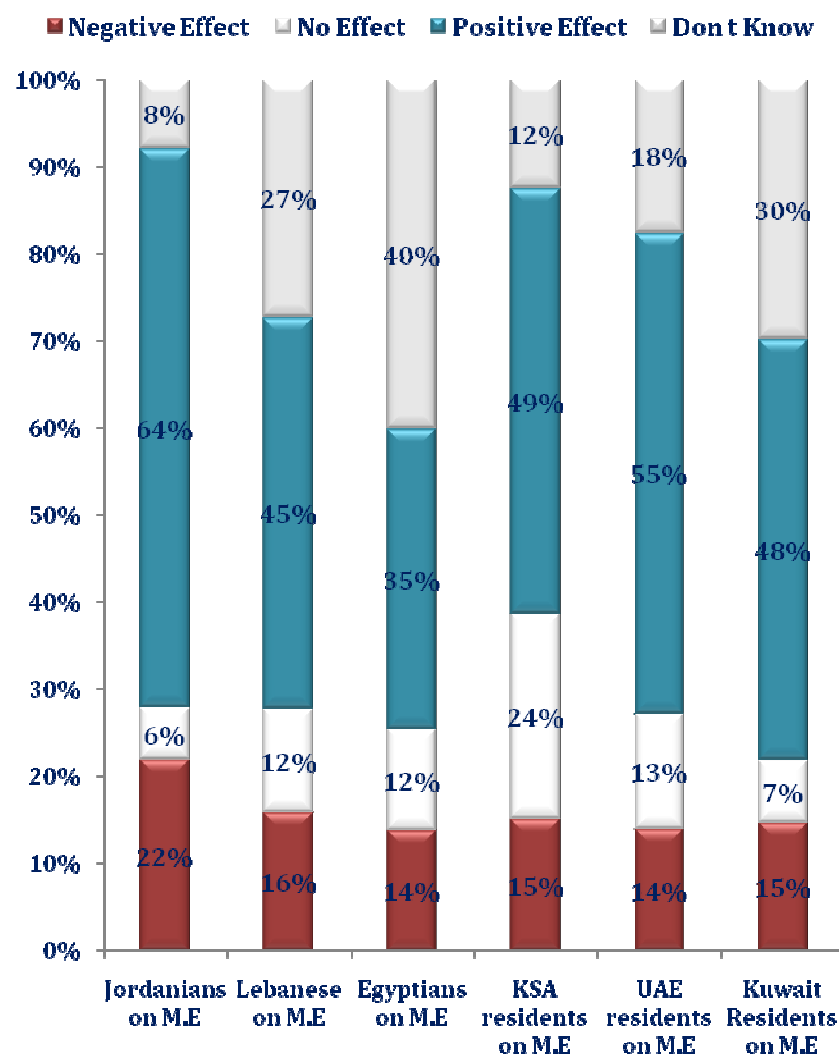


## Expected Effect of President Barack Obama on Respondent's Country of Residence / Middle East

### Expected Impact on (My) Country



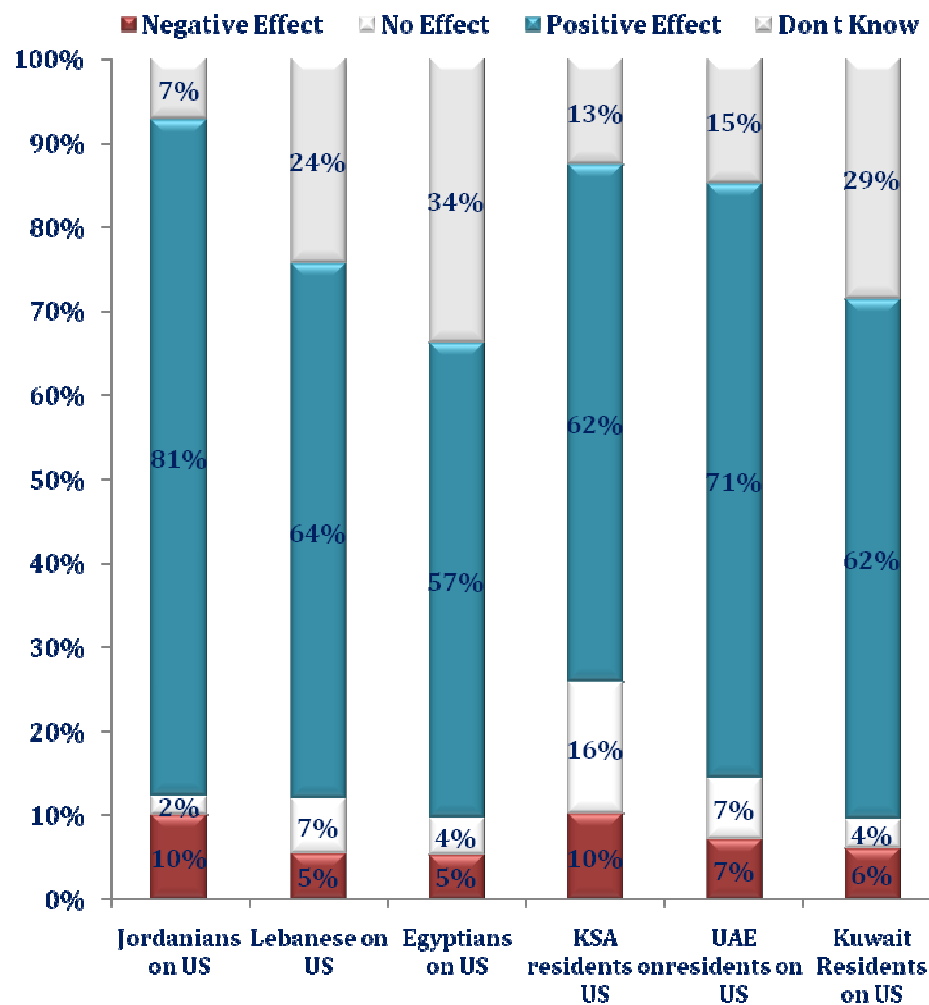
### Expected Impact on The Middle East



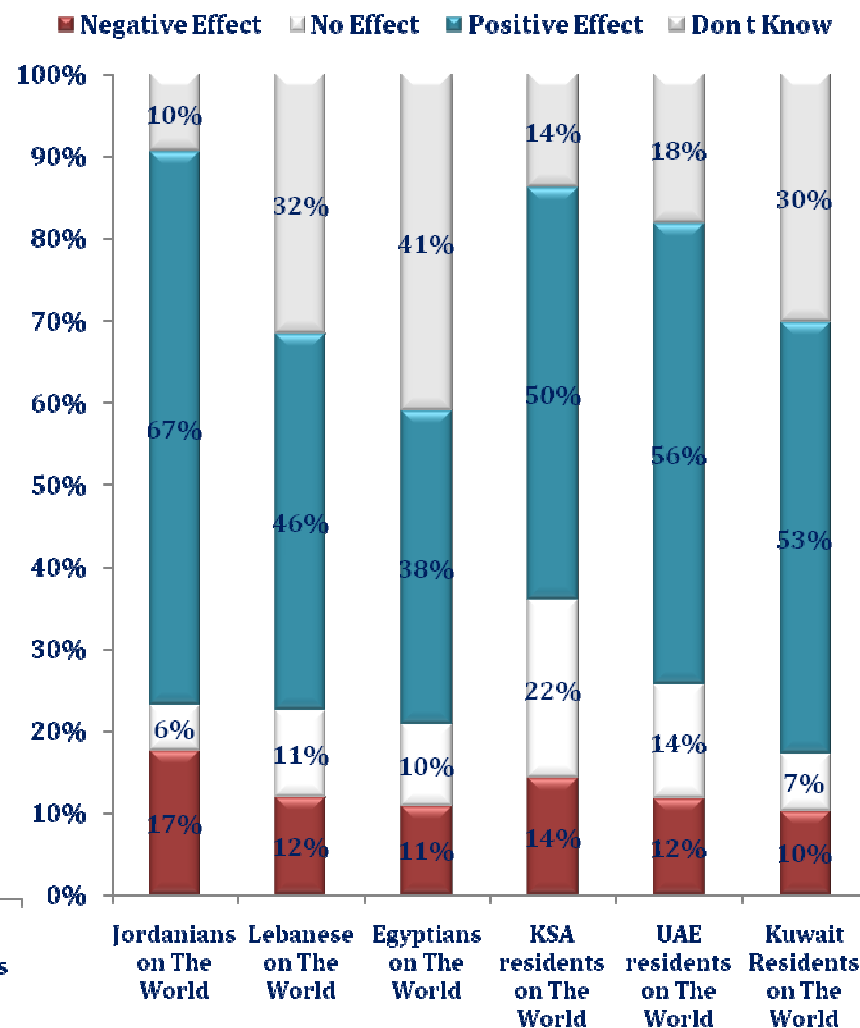


# Expected Effect of President Barack Obama on USA / The World

## Expected Effect on The US



## Expected Effect on The World

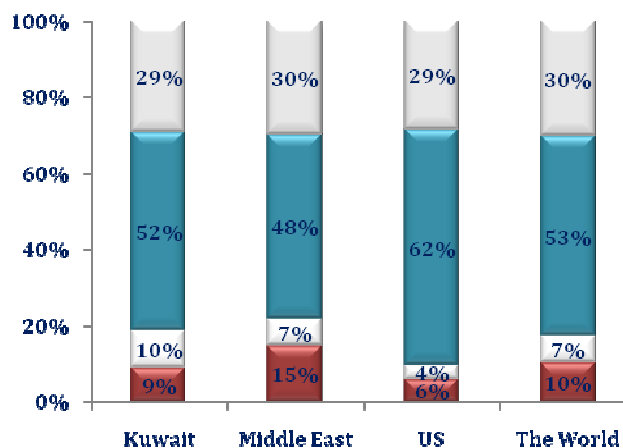




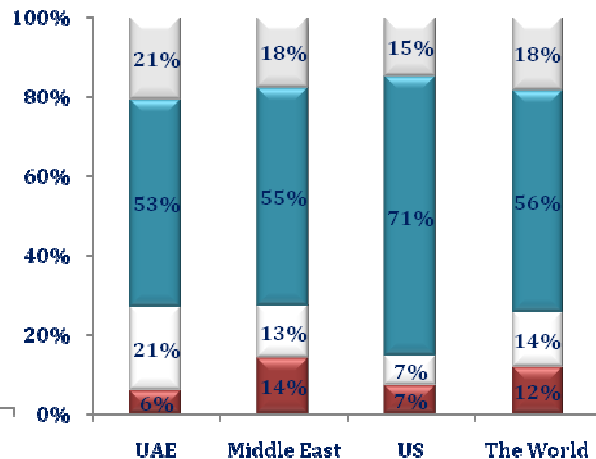


# Expected Effect of President Barack Obama on USA /The World as stated by...

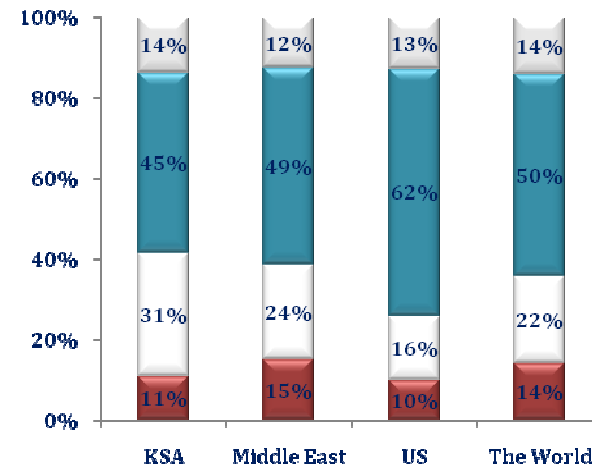
**Kuwait Residents**



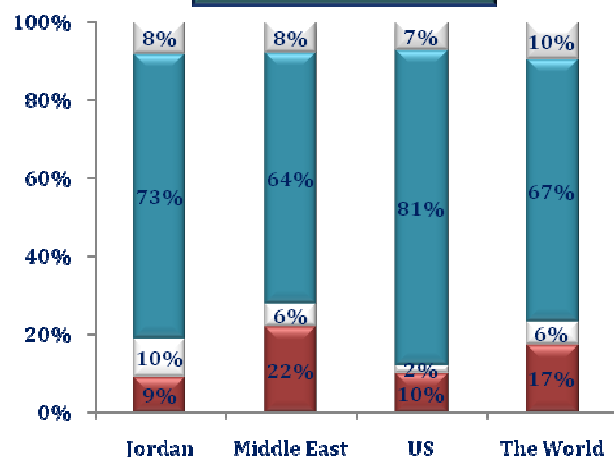
**UAE Residents**



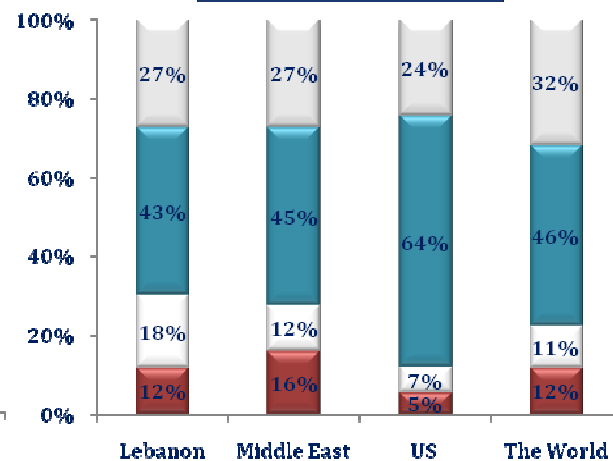
**KSA Residents**



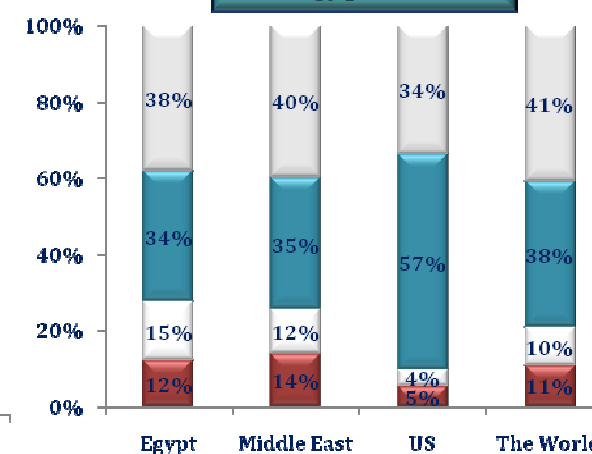
**Jordanians**



**Lebanese**



**Egyptians**



■ Negative Effect 
 ■ Positive Effect 
 ■ No Effect 
 ■ Don't Know



# Methodological Notes

## Sample & Margins of Error

### Sample Size

- The Ipsos MENA Poll covers six (6) countries in the Middle East & North Africa.
- The sample in each country was selected to ensure a nationally representative sampling frame from the total population over 15 years of age.
- Samples for the Levant countries (Lebanon, Jordan, Egypt), covered nationals of that country only, who are the primary residents of those countries. For Gulf Countries (KSA, UAE and Kuwait), samples covered all residents, including expatriates.
- The sample distribution per country is as follows:

Country	Sample Size	Margin of Error
Kingdom of Saudi Arabia	1,400	+/-2.6%
United Arab Emirates	1,200	+/-2.8%
Kuwait	1,000	+/-3.0%
Egypt	1,400	+/-2.6%
Lebanon	1,000	+/-3.0%
Jordan	1,000	+/-3.0%



# Methodological Notes

## Methodology & Representativeness

### Methodology

- RDD Telephone interviews (nationally representative of each country – Over 15 years of age)
- The CATI interviews were conducted using a representative quota sample of Landline and Mobile phone numbers, designed to ensure:
  - More robust national population representativeness
  - Highest levels of representation of the population.
- The % of the population represented by our sampling frame was thus calculated as follows:

Country	Sample Size	% of National Population – Over 15 Years of Age- Represented by Sample
Kingdom of Saudi Arabia ( <i>National</i> )	1,400	90%
United Arab Emirates ( <i>National</i> )	1,200	95%
Kuwait ( <i>National</i> )	1,000	95%
Egypt ( <i>Urban – Landline only</i> )	1,400	81%
Lebanon ( <i>National</i> )	1,000	70%
Jordan ( <i>National</i> )	1,000	86%



# Methodological Notes

## Nationality Distributions

### Nationality Distributions

- Samples for the Levant countries (Lebanon, Jordan, Egypt), covered nationals of that country only, who are the primary residents of those countries. For Gulf Countries (KSA, UAE and Kuwait), samples covered all residents, including expatriates., since they do represent large segments of the population base.
- Expatriates were segmented as Arab Expats versus Non Arab Expats, the latter representing both Asian and Western Expatriate skilled-labor in the country.
- The sample distribution per country is as follows:

Country	Local Nationals	Arab Expats	Non Arab Expats
Kingdom of Saudi Arabia	75%	25%	--
United Arab Emirates	20%	30%	50%
Kuwait	55%	30%	15%
Egypt	100%	--	--
Lebanon	100%	--	--
Jordan	100%	--	--



# Methodological Notes

## Timing & Quality Assurance

### Time of Fieldwork

➤ The fieldwork started on the 10th of March, 2009, and was completed by the 25th of March, 2009.

### Quality Assurance

➤ Quality assurance is crucial to any research. Ipsos guarantees credibility and validity of results and findings by applying a comprehensive scope of quality control measures and procedures.

➤ Ipsos interviewers undergo intensive training programs to ensure their adherence to sampling and interviewing procedures. Spot checks/verifications, editing and re-interviewing are performed to ensure that **more than 60%** of the total sample is cross checked, edited and back-checked, in order to guarantee quality.



# Methodological Notes

## Questions Asked

1. Taking into account all the things which you think are important, how favorable or unfavorable is your overall opinion or impression of the United States?

- *(Very favorable, Mainly favorable, Neutral, Mainly unfavorable, Very unfavorable)*

2. And taking into account all the things which you think are important, how favorable or unfavorable is your overall opinion or impression of U.S. President Barack Obama?

- *(Very favorable, Mainly favorable, Neutral, Mainly unfavorable, Very unfavorable)*

3. Do you think that President Barack Obama will have a positive or negative effect on?  
*(Positive Effect / No Effect / Negative Effect)*

- Country of Residence
- Middle East
- United States
- The World



# Methodological Notes

## Demographic Questions

➤ The survey also collected extensive background information on the respondent and the household, allowing the possibility of analyzing questions on particular respondent segments while also allowing for extensive consumer profiling. The various respondent classification and demographic criteria incorporated within the program, include:

- Gender
- Age
- Area of Residence
- Nationality
- Marital Status
- Social Class
- Education
- Working Status
- Employment Category
- Chief Income Earner
- Children / Family Size
- Main Shopper
- etc...



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