



Global @dvisor

Winds of Change: Citizens in 23 Countries Weigh the Possible Outcomes and Impact of Regime Change in the Middle East



A Global @dvisory – April 2011
Regime Change

Methodology...

- These are the findings of the *Global @dvisor* Wave 19 (G@19), an Ipsos survey conducted between March 2nd and March 14th.
- The survey instrument is conducted monthly in 23 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, France, Germany, Great Britain, Hungary, India, Indonesia, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America. *Due to safety considerations for respondents, those surveyed in Saudi Arabia were given the option of “prefer not to say”.*
- For the results of the survey presented herein, an international sample of 17,531 adults aged 18-64 in the US and Canada, and age 16-64 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Indonesia, Mexico, Poland, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.
- Weighting was employed to balance demographics and ensure the sample's composition reflects that of the adult population according to the most recent country Census data available and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/-3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points for a sample of 500. 19 times out of 20 per country of what the results would have been had the entire population of adults in that country had been polled.

Analytic Components...

- There are two analytic components that make up the findings of this report. Each question is tracked and analyzed from questions dealing with the preface:

As you may know, a number of countries in the Middle East including Egypt, Libya, Tunisia, Bahrain and Iran are experiencing public uprisings to change their government and/or their leader.

1. Middle East Government Uprisings – If Successful: Anticipated Results

- a) *Generally, if the people in these countries are successful do you think it will create real democratic governments where their citizens can both vote and have a real say in their future, or, will this government just be replaced by another government or leader that will be as bad or worse than the previous government?*

1. Would Major Change in Government Lead to Meaningful Improvements in Lives

- a) *If the people in these countries are successful in forcing a major change in their governments, do you think this will lead to meaningful improvements in their day-to-day lives? Yes/No*

SUMMARY

Majority (72%) of global citizens agree that if the people in these countries force a major change in governments this will lead to meaningful improvements in their day-to-day lives...

However, the world is split on whether Middle East regime change will (52%) or will not (47%) lead to democracy.

Introduction...

- The political uprisings in Tunisia and Egypt at the start of 2011 have created a massive ripple effect throughout the Middle East. Violent conflict is now rife in places like Libya, Bahrain and Yemen, along with Saudi Arabia and Iran experiencing upheaval.
- These events have the potential to mark an era of historical importance—and great uncertainty. Do these demonstrations truly represent populations in autocratic regimes fighting for their voice to be heard and for the end of authoritarianism in their countries, or are there other forces at work? And even if the protests lead to a regime change the results are not guaranteed to yield governments that lead democratically or take popular opinion into consideration.
- Ipsos questioned citizens in 23 countries (a total of 17,531 adults) to consider their thoughts on the current conflicts and assess the potential outcome of the Middle East turmoil.
- A strong majority (72%) agree that if people in these countries force a change in government, it will lead to meaningful improvements in their day-to-day lives. However, global citizens are split on what type of outcome will arise: 52% say it will lead to a democracy while 47% say it will lead to more of the same or worse.



Majority (72%) agree that if the people in these countries force a major change in governments this will lead to meaningful improvements in their day-to-day lives...

- When asked if a regime change will lead to meaningful improvements in the day-to-day lives for those living in the affected countries a strong majority (72%) of people in 23 countries agree with this assessment.
- The region that is most likely to agree that regime changes due to public uprisings in the Middle East and Africa will lead to meaningful improvements in day-to-day lives of people living in those countries is Latin America (81%). India (88%), Turkey (87%), Mexico (85%), Italy (84%), Brazil (80%), Argentina (78%) and Sweden (78%) are the specific countries expressing the most agreement.
- Alternatively, those that are less in agreement that the outcome would be meaningful are Russia (55%), Germany (55%), Saudi Arabia (61%), Poland (61%), Great Britain (61%), Hungary (63%) and Australia (65%).



However, the world is split on whether Middle East regime change will (52%) or will not (47%) lead to democracy...

- With great instability in the region and no end in sight to the conflicts in the affected Middle Eastern countries, perhaps it's not surprising that the *average* sentiment of the global citizenry is split, hardly resolute in what the end game will produce:
- If the public uprisings in these countries are successful in changing their government and/or their leader, **52% think it will create real democratic governments** where their citizens can both vote and have a real say in their future compared to **47% who say** the current government in each country **will just be replaced by another government or leader that will be as bad or worse** than the previous one.
- In this regard, a strong majority of citizens in **South Korea** (75%), **India** (74%), **Indonesia** (66%) and **Brazil** (65%) say the **hypothetical new governments would be democratic**. **Latin America** (61%) is the region most likely to agree on this point.
- Those countries **least in agreement** include: **Russia** (29%), **Saudi Arabia** (37%), **Belgium** (38%), **Great Britain** (41%), the **United States** (42%) and **Poland** (42%) also are least likely to believe that regime change will lead to democracy and most likely to believe that the new government put in place will be the same or worse. **Europe** (46%) is the least to agree with this point.

Some Specific Insights...

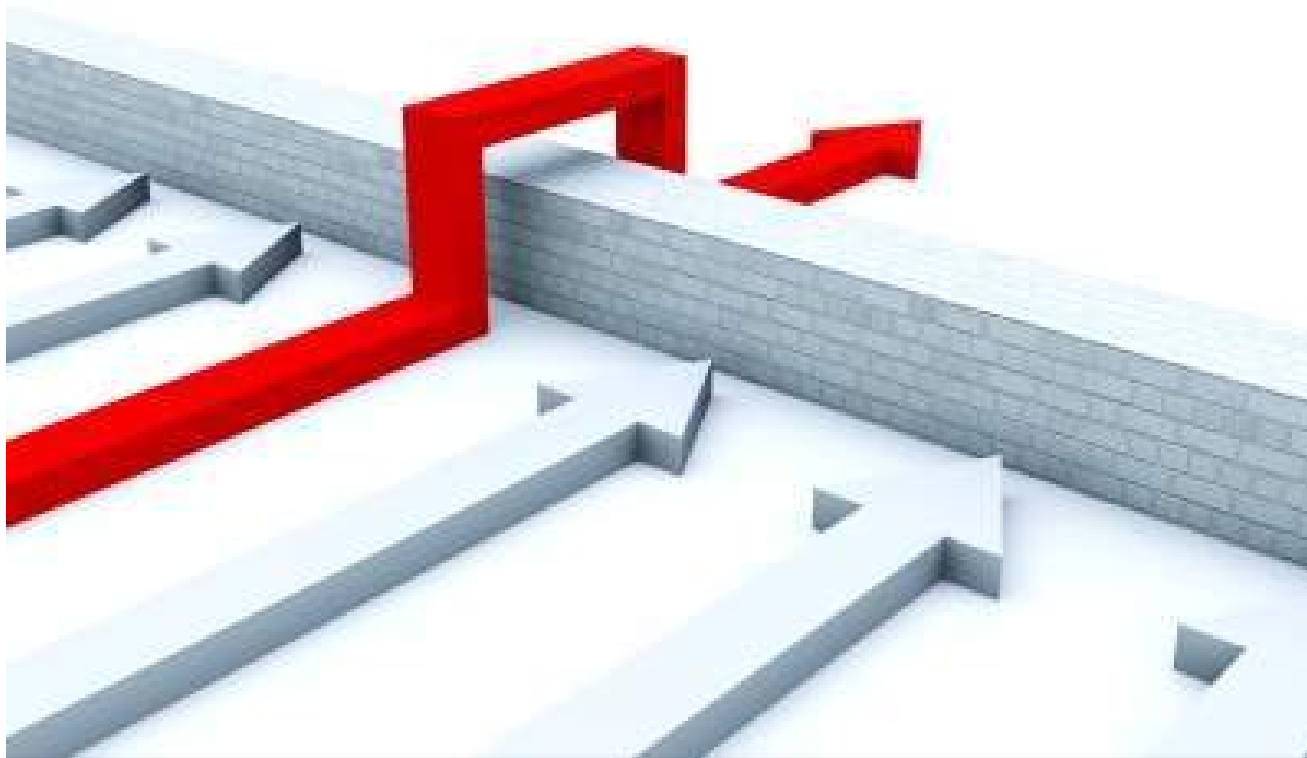
- A majority of citizens in **Saudi Arabia** agreed that regime change would lead to meaningful improvements on people's everyday lives (61%). Only four in ten (37%) said it would lead to democratic governance.
- **South Africans** are more likely to agree the results would be meaningful (75%) but are evenly split on predicting democracy for affected countries (50%).
- A strong majority in **Indonesia** agree the results would have a meaningful impact (73%) and would lead to a democracy (66%).
- **Latin America is the region that is most optimistic of them all**: they are likely to say the regime change will lead to democratic futures in affected countries (61%) and to say that, generally, a regime change will lead to meaningful improvements to people's day-to-day lives. Perhaps this optimism stems from Venezuela's President Hugo Chavez and his so-called "Bolivarian Revolution".

DETAILED FINDINGS

Questionnaire Preface:

As you may know, a number of countries in the Middle East including Egypt, Libya, Tunisia, Bahrain and Iran are experiencing public uprisings to change their government and/or their leader.

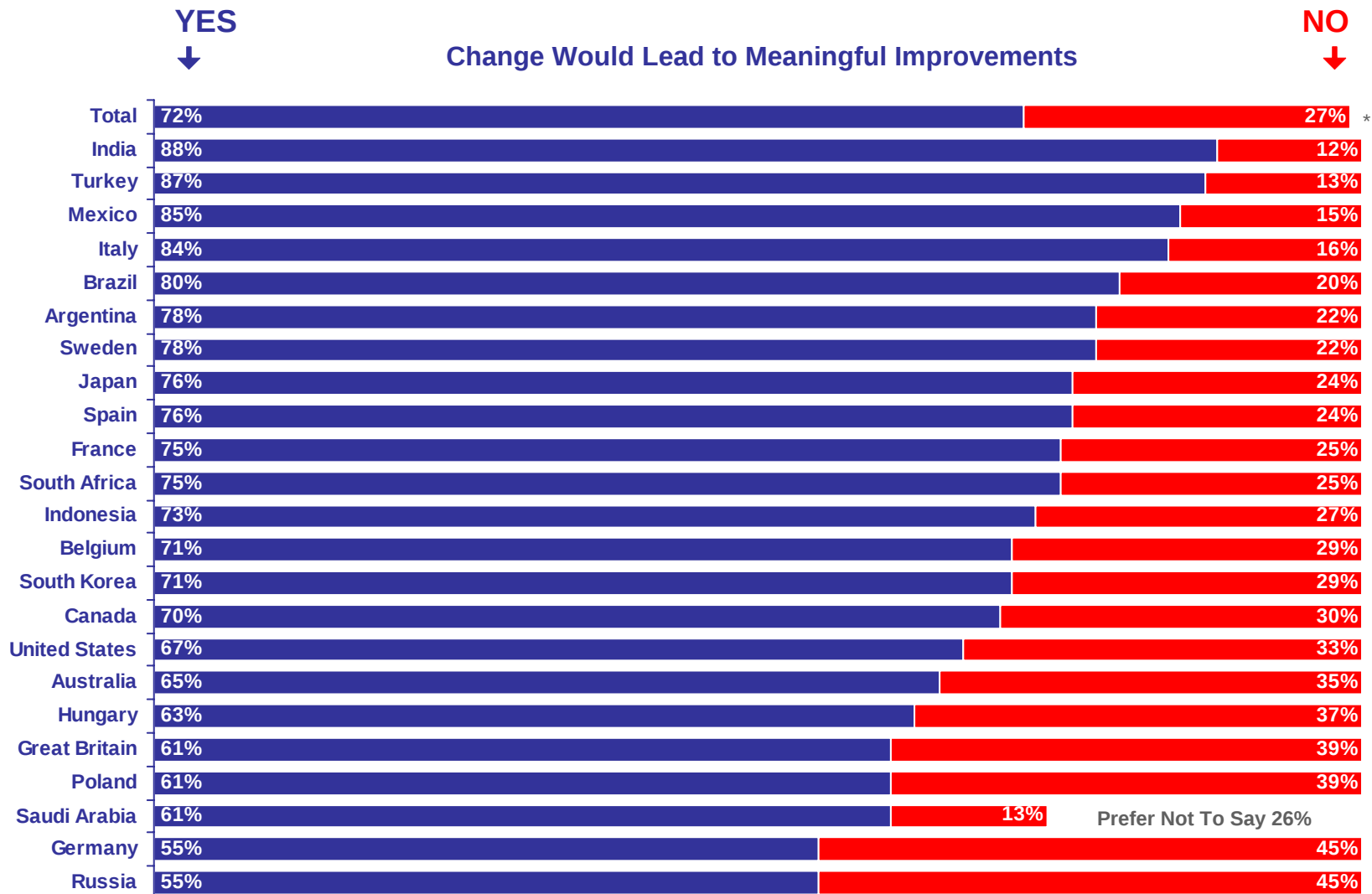
If the people in these countries are successful in forcing a major change in their governments, do you think this will lead to meaningful improvements in their day-to-day lives?



Detailed Tables C.G.2.

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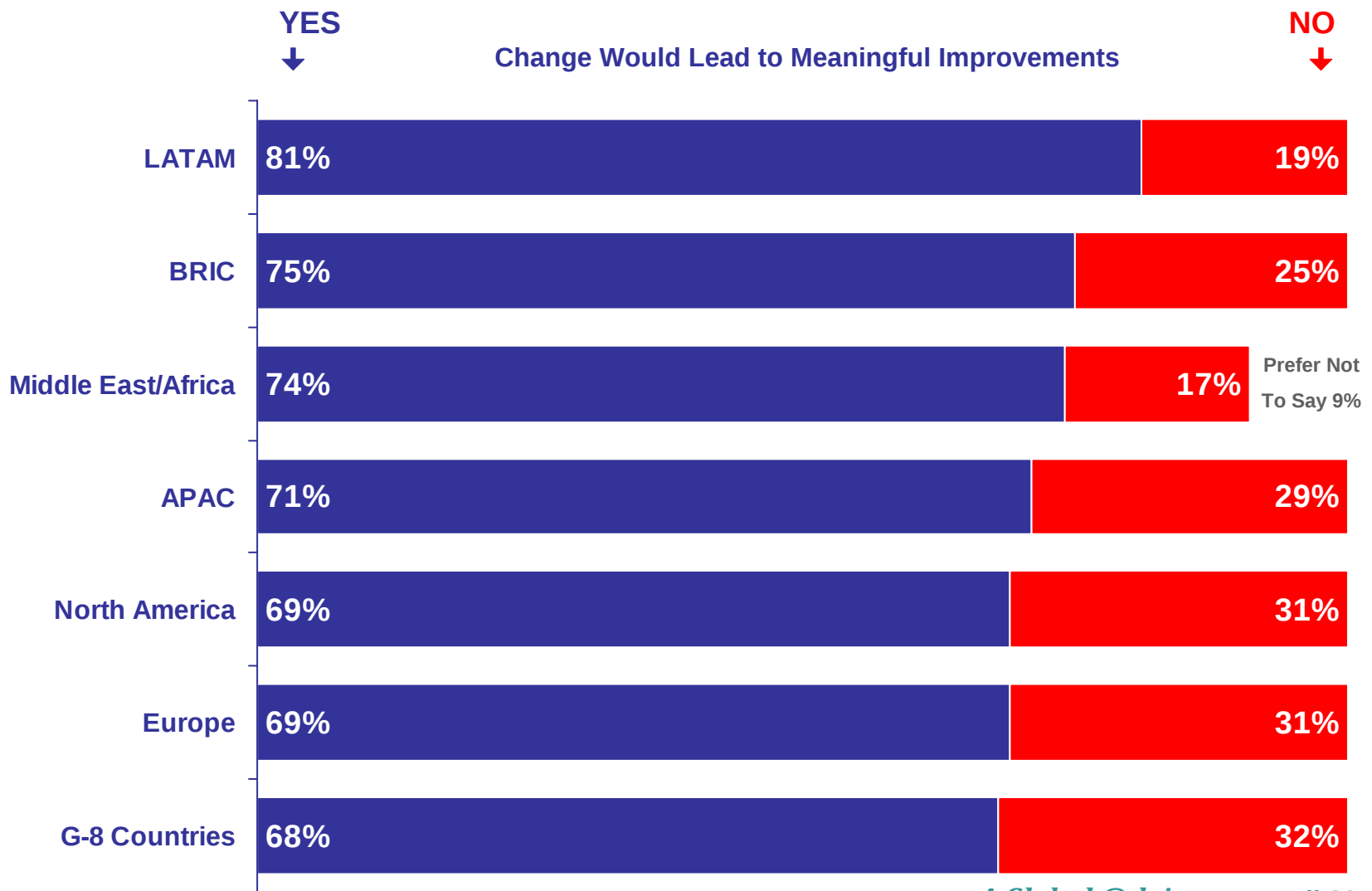
If the people in these countries are successful in forcing a major change in their governments, do you think this will lead to meaningful improvements in their day-to-day lives? COUNTRIES



* Prefer Not To Say 1%

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If the people in these countries are successful in forcing a major change in their governments, do you think this will lead to meaningful improvements in their day-to-day lives? REGIONS



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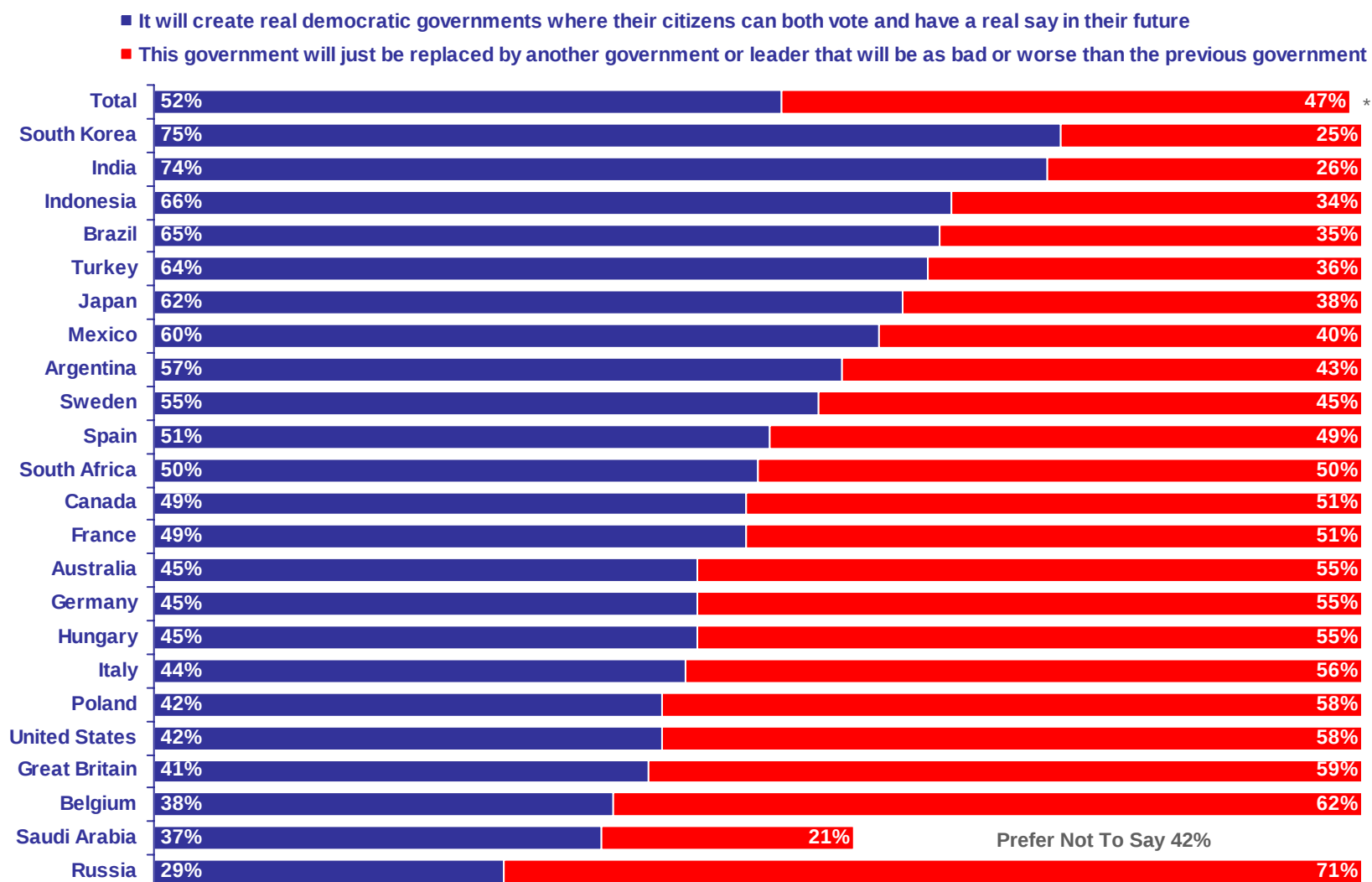
Generally, if the people in these countries are successful do you think it will create real democratic governments where their citizens can both vote and have a real say in their future, or, will this government just be replaced by another government or leader that will be as bad or worse than the previous government?



Detailed Tables C.G.1.

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Do you think it will create real democratic governments where their citizens can both vote and have a real say ... COUNTRIES

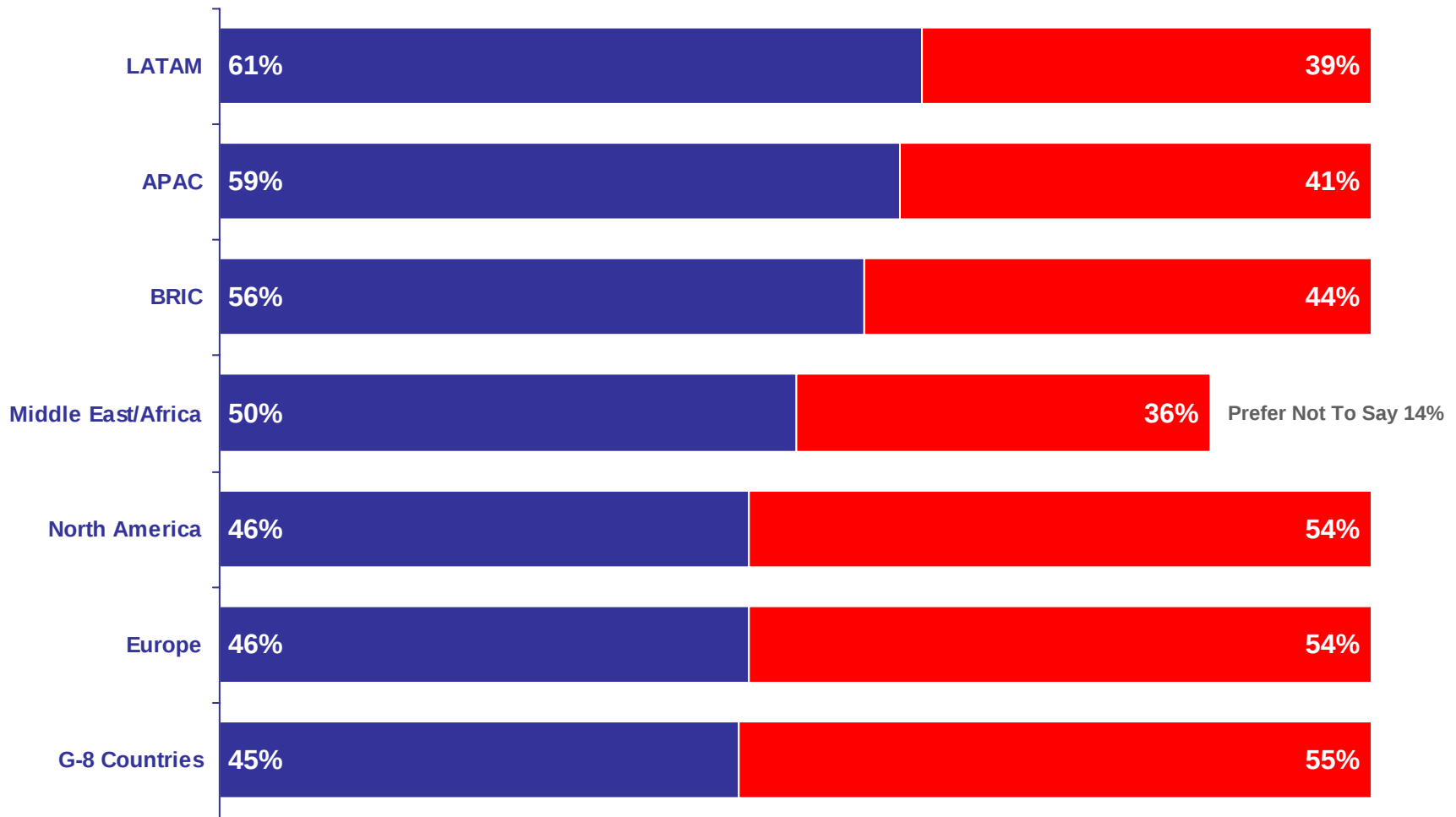


* Prefer Not To Say 2%

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Do you think it will create real democratic governments where their citizens can both vote and have a real say ... REGIONS

- It will create real democratic governments where their citizens can both vote and have a real say in their future
- This government will just be replaced by another government or leader that will be as bad or worse than the previous government





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- The Ipsos *Global @dvisor Omnibus* is a monthly, online survey of consumer citizens in 24 countries and produces syndicated reports and studies specifically tailored to the needs of corporations, advertising and PR agencies, and governments. For information contact:

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