



CRISIS OF CONFIDENCE

Lebanese Reflect on Their
Crisis, Their Institutions,
And Their Future

EXECUTIVE SUMMARY

Between September 20-29, 2021, Zogby Research Services conducted a survey of 869 Lebanese adults to examine their attitudes with a particular eye on the economic crisis facing the country and her people, their confidence in their institutions, relations with other countries, Lebanon's political system and elections, and their top priorities. A summary analysis is followed by the complete results below.

I. Economic Situation

The Lebanese are clearly hurting from their country's economic collapse, with almost nine in 10 saying they are worse off than they were five years ago. Virtually the entire population reports being seriously impacted by shortages in fuel (97%), electricity (89%), and drinking water (74%). More than one-third report having to go without food on some occasions, with one in five of those who are poor saying they or members of their families have "very often gone without meals because of a lack of money or available food."

Almost two-thirds say they don't have enough income to make ends meet. And when asked to identify the most pressing economic problems facing the country, far and away, the two issues they point to are the collapse of the lira and corruption. Given this dire situation, almost two-thirds of all respondents say they would emigrate, if given the opportunity.

Surprisingly, almost two in five Lebanese say they expect that their situation will be better in the next five years. Those who have this higher-than-expected optimism correlate with those who have strong confidence in the role of the Lebanese Armed Forces and those who believe that next year's elections will bring change to the country.

II. Confidence in Institutions and Other Countries

The institutions and entities in which the Lebanese public have the greatest confidence are the Lebanese Armed Forces (89%), civil society (mujtama' al madani) (85%), and religious leadership (80%) Also receiving high scores are the judiciary (75%) and the October 17th Thawra movement (65%).

The lowest confidence scores were given to the Parliament (29%) and the traditional political parties (19%).

Opinion was divided on Hizbollah owing to a deep split in the attitudes of Shia who strongly support the group and Sunnis who are overwhelmingly opposed to it. It is important to note that almost two-thirds of Lebanese express the belief that the "weapons and forces of the resistance should be under the control of the LAF"—and this includes a majority of respondents in every sectarian community.

The recently installed government of Najib Mikati has the support of a majority of all Lebanese.

When asked whether Lebanon should strengthen or weaken ties with other countries, only France scores well, with Lebanese supporting strengthening ties by a two-to-one margin. Opinion is evenly divided about ties with the US and Iran, with one-third saying strengthen, one-third saying weaken, and one-third saying they

should remain as they are. Russia fares somewhat worse with one-third wanting to strengthen ties and one-half wanting to weaken them. Finally, Saudi Arabia and Syria both rate poorly with only one in 10 Lebanese wanting to strengthen ties with either country.

III. Politics, Elections, and Priorities

Lebanese are somewhat optimistic when looking ahead to next year's elections with almost three in five expressing some confidence that they'll "bring the political change Lebanon needs." This attitude may be due to the fact that two-thirds of all respondents say they'll be voting for the "new alternative parties" —with this holding true for all demographic groups. Only one in five say they'll vote for the "traditional parties." This rejection of traditional politics is also reflected by the almost three in five who say that Lebanon should reject the Taif formula and "adopt a new constitutional model of governance."

When asked to rank the top political priorities facing the country, far and away the top concern is "ending corruption and nepotism," followed by the more traditional concerns of improving the educational and health care systems, and creating jobs.

While some of the political parties may be divided as to whether or not there should be a "full investigation of and accountability for the explosion in the Port of Beirut," a huge 97% of our respondents, across the board, say it is important that this be done.

And finally, despite being crushed by a collapsed economy and overwhelmed by the huge influx of Syrian refugees, 83% of Lebanese still believe that their country has a humanitarian responsibility to take in these refugees and 71% believe "they should be allowed to remain until it is safe for them to return."

RESULTS

Economic Situation

Table 1. When you think about your current situation, are you better off or worse off than you were five years ago?

	2021	2019
Better off	6	29
Worse off	88	44
About the same	8	27

Satisfaction among Lebanese respondents is extremely low. Almost nine in 10 (88%) say they are worse off today than they were five years ago; just 6% say they are better off. This is markedly lower than in 2019, when 29% said they were better off and 44% said they were worse off than five years ago.

Table 2. Looking to the future, do you think your situation will be better, worse, or the same five years from now?

	2021	2019
Better off	38	11
Worse off	34	67
About the same	28	22

Optimism about the future, however, is surprisingly high for what appear to be reasons we will see below (in Tables 11 and 19a). A plurality of respondents (38%) say they expect their situation will be better five years from now, compared to 34% who say it will be worse. Optimism is slightly higher among respondents age 45 and older (42% better off) than among those 44 and younger (35% better off).

Optimism today is three times higher than it was in 2019 when just 11% expected things to improve in the next five years, while 67% expected things to get worse.

Table 3. In your opinion, what are the two most pressing economic problems facing Lebanon today?

Rank	Issue
1	The collapse of value of the lira
2	Corruption
3	The government defaulting on Lebanon's debt
4	Ending subsidies
5	The banking crisis
6	Shortages of fuel and medicines

Respondents were asked to select and then rank the two most pressing economic problems facing Lebanon today. Far and away the top choice is the collapse of the value of the lira, identified as one of the top two most

pressing economic problems by 72% of respondents overall. The second choice, corruption, also stands well above other concerns, with 65% identifying it as one of the most pressing problems facing Lebanon today. The government defaulting on Lebanon’s debt and ending subsidies are concerns for about 20% of the respondents. Finally, the banking crisis and shortages of fuel and medicines are the least likely to be identified as the most pressing economic problems.

Table 4. With regard to government subsidies that have been in place since October 2019, in your opinion have they been ...

... a big help to the poor.	1
... not really a help, because the commodities that are subsidized aren’t always available.	42
... of benefit to smugglers who have been selling subsidized commodities for profit to other countries.	12
... a waste of resources.	45

A plurality of Lebanese respondents (45%) feel that the government subsidies that have been in place since October 2019 have been a waste of resources. Almost an equal percentage (42%) say they have not really been a help because the subsidized commodities aren’t always available. Twelve percent (12%) say government subsidies actually benefit smugglers who sell the subsidized commodities for profit to other countries. A mere 1% of respondents believe the subsidies have been a big help to the poor. It’s notable that about 50% of the poorest Lebanese (i.e., those with annual incomes less than \$1000) say government subsidies are “a waste of resources.”

Table 5. How have you and your family have been impacted in each of the following areas?

	Seriously impacted	Somewhat impacted	Very little impact
Drinking water	74	22	4
Electricity	89	11	<1
Fuel	97	3	--

Lebanese respondents report serious impact for themselves and their families with respect to fuel (97%), electricity (89%), and drinking water (74%). Respondents with lower incomes and less education are even more likely to report serious impact with respect to drinking water (81%-82%) and electricity (94%).

Table 6. Have you or members of your family had to go without food because of a lack of income or available food?

Very often	9
It’s happened a few times.	27
It’s never happened to us.	64

Table 6a. Have you or members of your family had to go without food because of a lack of income or available food?

	Annual income			
	<\$500	\$500-1000	\$1001-2000	>\$2000
Very often	21	5	4	3
It’s happened a few times.	21	31	39	18
It’s never happened to us.	58	64	57	79

More than one-third of Lebanese respondents say they or members of their family have had to go without food because of a lack of income or available food either “very often” (9%) or “a few times” (27%). Of those with annual household incomes less than \$500, 21% say they very often have had to go without food.

Table 7. Do you have enough income to cover your monthly expenses and make ends meet?

Yes, I have enough.	38
No, I do not have enough.	62

Table 7a. Do you have enough income to cover your monthly expenses and make ends meet?

	Annual income			
	<\$500	\$500-1000	\$1001-2000	>\$2000
Yes, I have enough.	36	30	32	61
No, I do not have enough.	64	70	68	39

Sixty-two percent (62%) of respondents do not have enough income to cover their monthly expenses and make ends meet. Only among those with the highest incomes (over \$2000 annually) is there a majority (61%) who are able to cover monthly expenses and make ends meet.

Table 8. Which of the following describe your sources of personal income?

My work	50
Savings	41
Support from my family in Lebanon	60
Remittances from family abroad	16
Assistance from charitable institutions	3
Other	0

Table 8a. Which of the following describe your sources of personal income?

	Age		
	Under 30	30-44	45+
My work	31	65	51
Savings	<1	30	80
Support from my family in Lebanon	81	55	49
Remittances from family abroad	39	9	6
Assistance from charitable institutions	4	1	4
Other	0	0	0

Primary sources of personal income reported by respondents include support from family in Lebanon (60%), work (50%), and savings (41%). Sixteen percent (16%) report receiving remittances from family abroad. Just 3% say they have received assistance from charitable organizations.

Sources of personal income vary significantly by age. The youngest respondents (under 30) rely heavily on family, with 81% getting support from family within the country and 39% receiving remittances from family

abroad. These young people are the least likely to have income from work (31%), compared to 65% of those ages 30-44 and 51% of those 45 and over. Savings are predominantly a source of income for those 45 and over (80%), while just 30% of those ages 30-44 and less than 1% of those under 30 have savings.

Table 9. Given the opportunity to leave and go to another country, how likely would it be that you would leave Lebanon?

Likely	63
Unlikely	37

Likely is the aggregation of responses “very likely” and “somewhat likely.” Unlikely is the aggregation of responses “somewhat unlikely” and “very unlikely.”

Table 9a. Given the opportunity to leave and go to another country, how likely would it be that you would leave Lebanon?

	Age			Annual income				Education	
	Under 30	30-44	45+	<\$500	\$500-1000	\$1001-2000	>\$2000	Primary or less	More than primary
Likely	70	75	49	56	62	67	72	55	68
Unlikely	30	25	51	44	38	33	28	45	32

Almost two-thirds of respondents say they would be likely to leave Lebanon if given the opportunity; 46% say they would be “very likely” to depart if given the chance. Those most likely to say they would emigrate if possible are younger (under 45: 73% vs. 45+: 49%), have higher annual incomes (more than \$2000: 72% vs. under \$500: 56%), and have more education (more than primary education: 68% vs. primary or less: 55%)

Table 10. If you were given the opportunity to emigrate, which of the following countries would be your preferred destination?

US	28
Brazil	22
Another country in Latin/South America	9
France	11
Another European country	13
UAE	7
Another Gulf Arab country	5
Other	5

Those who said they would be either very or somewhat likely to leave Lebanon if given the opportunity were asked which country would be their preferred destination. The most popular choices among most demographic groups are the United States (28%) and Brazil (22%). France (11%), another European country (13%), or another country in Latin or South America (9%) are the next most likely countries to which to emigrate. The UAE (7%) or another Gulf Arab country (5%) are less popular choices.

Confidence in Institutions & Other Countries

Table 11. With regard to each of the following institutions or movements, in your opinion how much confidence do you have in the benefit they bring to Lebanon's stability?

	Confidence	No confidence
Lebanese armed forces	89	11
Judiciary	75	25
Religious leadership	80	20
Traditional political parties	19	81
Parliament	29	71
Hizbollah	48	52
October 17 th Thawra movement	65	35

Confidence is the aggregation of responses “great confidence” and “some confidence.” No confidence is the aggregation of responses “very little confidence” and “no confidence at all.”

Overall, at least three quarters of respondents have confidence that the Lebanese armed forces (89%), the religious leadership (80%), and the judiciary (75%) benefit Lebanon's stability. About two-thirds also are confident that the October 17th Thawra movement (65%) benefits the country's stability. On the other hand, only about one in three respondents overall (29%) has confidence that the Parliament is a stabilizing force in the country, and just 19% view the traditional political parties as benefiting Lebanon's stability.

Confidence in the Lebanese armed forces is highest among those who are optimistic about the future (92%).

With respect to all of these institutions and movements, opinions are similar for respondents regardless of religious identification; Sunni, Shia, Christian and Druze respondents hold markedly similar views. However, opinion is quite divided over the stabilizing influence of Hizbollah; 48% of respondents overall have confidence that it benefits the country's stability while 52% disagree. Among Shia respondents, 80% have confidence in Hizbollah, as do majorities of Druze (64%) and Christian (56%) respondents; however, no Sunni respondents express confidence that Hizbollah benefits Lebanon's stability.

Generally, confidence in these institutions and movements are also quite similar across groups defined by gender, age, income, and education. One exception is that respondents under 30 are more likely to express confidence (76%) in the benefit that the October 17th Thawra movement brings to Lebanon's stability than older respondents (30-44: 63% and 45+: 60%).

Table 12. How confident are you that civil society (mujtam'a al madani) organizations can play a role in bringing positive change to Lebanon?

	All	Sunni	Shia	Christians	Druze
Confidence	85	83	78	90	93
No confidence	15	17	22	10	7

Confidence is the aggregation of responses “great confidence” and “some confidence.” No confidence is the aggregation of responses “very little confidence” and “no confidence at all.”

There is great confidence across the board that civil society organizations can play a role in bringing positive change to Lebanon, higher than everything other than the military. Eighty-five percent (85%) of respondents overall hold this view, including more than nine in 10 Druze and Christian respondents.

Table 13. With regard to the weapons and forces of the resistance, which of the statements below most closely reflects your view?

	All	Sunni	Shia	Christians	Druze
The weapons and forces of the resistance should be under the authority of the Lebanese Armed Forces.	63	73	53	62	69
The resistance should continue to operate independent of the state's authority.	36	27	47	38	31

Almost two-thirds of Lebanese respondents (63%) say that “the weapons and forces of the resistance should be under the authority of the Lebanese Armed Forces,” a view consistent with the high level of confidence that respondents express overall in the stabilizing influence of the armed forces (see above in Table 11). Majorities of respondents in all religious groups hold this opinion, though Sunni respondents are significantly more likely than their Shia counterparts to express this view (73% vs. 53%).

Table 14. How confident are you that the government led by Prime Minister Najib Mikati will be able to bring positive results for Lebanon?

	All	Sunni	Shia	Christians	Druze
Confidence	54	62	44	55	53
No confidence	46	38	56	45	47

Confidence is the aggregation of responses “great confidence” and “some confidence.” No confidence is the aggregation of responses “very little confidence” and “no confidence at all.”

A slim majority (54%) overall are confident that the government led by Prime Minister Najib Mikati will be able to bring positive results for Lebanon. Sunni respondents are most likely to express confidence (62%), and majorities of Christians (55%) and Druze (53%) agree. A majority of Shia respondents, however, do not have confidence in the prime minister (56%).

Table 15. With regard to each of the following countries, in your opinion is it in Lebanon's interests that relations with them be strengthened or reduced?

		All	Sunni	Shia	Christian	Druze
United States	Strengthened	33	33	31	33	45
	Reduced	33	32	34	32	33
	Remain the same	34	35	35	35	22
France	Strengthened	49	47	51	49	60
	Reduced	24	23	25	25	22
	Remain the same	27	31	24	27	18
Iran	Strengthened	34	16	53	35	31
	Reduced	35	54	13	37	38
	Remain the same	30	30	34	28	31
Saudi Arabia	Strengthened	11	17	10	7	9
	Reduced	60	52	62	64	56
	Remain the same	29	31	28	29	35
Russia	Strengthened	31	26	33	33	31
	Reduced	48	58	41	45	49
	Remain the same	21	16	26	23	20
Syria	Strengthened	10	9	13	10	7
	Reduced	65	69	58	66	69
	Remain the same	25	22	29	24	24

When asked about relationships with other countries, only in the case of France do a plurality of respondents believe strengthened relations would be in Lebanon's interests (49%), a two-to-one margin over those who want relations with France reduced (24%). Opinion is evenly split with respect to relations with the United States and Iran, with about one-third saying a stronger relationship would be in the country's interests, while another third say reducing relations would be preferable. Almost one-half of Lebanese respondents (48%) want to reduce relations with Russia, while one-third want that relationship strengthened. Only about one in 10 respondents want to strengthen relations with Saudi Arabia and with Syria, with more than six in 10 saying it would be in Lebanon's interests to reduce relations with these countries.

A deeper look at the views of respondents by religious sect reveals generally similar opinions with a few notable exceptions. A majority of Shia respondents (53%) think it would be in Lebanon's interests to strengthen ties with Iran, while only 16% of Sunni respondents and about one-third of Christian (35%) and Druze (31%) respondents agree. Sunni respondents are most likely to want reduced relations with Russia (58%, 9-17 points higher than their counterparts in other religious sects).

Politics, Elections & Priorities

Table 16. Did you vote in the 2018 parliamentary elections?

Yes	54
No	46

Table 17. Did you vote in the 2018 parliamentary elections?

	Age		
	Under 30	30-44	45+
Yes	30	64	62
No	70	36	38

Just over one-half of the respondents (54%) say they voted in the 2018 parliamentary elections. Young people were the least likely to vote (under 30: 30% vs. 30-44: 64% and 45+: 62%).

Table 18. If elections are held in 2022, would you vote for the traditional parties or would you vote for the new alternative parties?

	All	Sunni	Shia	Christian	Druze
I would vote for the traditional parties.	20	21	19	21	18
I would vote for the new alternative parties.	66	67	63	67	67
I don't plan to vote at all.	14	12	18	12	15

Two-thirds of respondents say that they would vote for the new alternative parties if elections are held in 2022. Two in 10 (20%) say they would stick with the traditional parties, while 14% say they do not plan to vote at all. These responses are very consistent across all religious sects.

Table 19. If the elections are held, how optimistic are you that they will bring the political change Lebanon needs?

	All	Sunni	Shia	Christian	Druze
Confident	57	58	59	56	56
Not confident	43	42	41	44	44

Confident is the aggregation of responses “very confident” and “somewhat confident.” Not confident is the aggregation of responses “only a little confident” and “not confident at all.”

Table 19a. If the elections are held, how optimistic are you that they will bring the political change Lebanon needs?

	Optimistic about future (Better off in five years)	Pessimistic about future (Worse off in five years)
Confident	65	41
Not confident	35	59

A solid majority of Lebanese respondents (57%) are either very (23%) or somewhat (34%) confident that elections will bring the political change Lebanon needs. Forty-three percent (43%) are not confident, but of these only 6% is not confident at all. Again, confidence is quite similar regardless of religious group.

Those who are optimistic about the future (i.e., think they will be better off in five years) are more likely to express confidence in elections bringing needed political change (65%) than those who are pessimistic about the future (i.e., think they will be worse off in five years: 41%).

Table 20. Is Lebanon well served by continuing the Taif formula or should it be scrapped in favor of a new constitutional system?

	All	Sunni	Shia	Christian	Druze
Lebanon should continue the Taif formula for governance.	42	46	47	36	38
Lebanon should adopt a new constitutional model of governance.	58	54	53	64	62

A majority (58%) think Lebanon should adopt a new constitutional model of governance, effectively scrapping the Taif formula. Majorities of respondents in all religious groups agree that the Taif formula should be scrapped.

Table 21. How important is it that there be a full investigation of and accountability for the explosion in the Port of Beirut?

Important	97
Not important	3

Important is the aggregation of responses “very important” and “somewhat important.” Not important is the aggregation of responses “somewhat unimportant” and “not important at all.”

There is near unanimity (97%) that it is important there be a full investigation of and accountability for the explosion in the Port of Beirut. For 58% of respondents this is “very important.”

Table 22. Rank of Most Important Issues: Of the following list of issues facing Lebanon, which are the three most important issues that need to be addressed? Rank them from 1 (being the most important) through 3.

Rank	2021	2019
1	Corruption	Employment
2	Education	Health Care
3	Health Care	Women’s rights
4	Employment	Extremism
5	Personal rights	Corruption
6	Political reform	Personal rights
7	Extremism	Foreign enemies
8	Women’s rights	Political reform
9	Foreign enemies	Democracy
10	Democracy	Education

Far and away, the top issue of concern in the current survey for Lebanese respondents is ending corruption and nepotism. This is followed by the traditional concerns of improving the educational system and the health care system, as well as expanding employment opportunities. Protecting personal and civil rights rounds out the top five priority issues in the current survey.

The concern with corruption has grown significantly since 2019 when it was ranked fifth, as has improving education which has risen from being the lowest ranked concern in 2019 to the second ranked priority in 2021. It is interesting to note that advancing democracy and protecting the country from foreign enemies remain issues of less concern to Lebanese respondents.

Table 23. It was our humanitarian responsibility to care for refugees when war made it impossible for them to remain in Syria.

	All	Sunni	Shia	Christian	Druze
Agree	83	84	82	82	87
Disagree	17	16	18	18	13

Agree is the aggregation of responses “strongly agree” and “somewhat agree.” Disagree is the aggregation of responses “somewhat disagree” and “strongly disagree.”

Lebanese respondents overwhelmingly agree (83%) that it was their humanitarian responsibility to care for Syrian refugees when war made it impossible for them to stay in Syria. This view is stable across all demographic groups, including all religious sects.

Table 24. Which of the following statements most closely reflects your current view about the Syrian refugees in Lebanon?

	All	Sunni	Shia	Christian	Druze
They should be allowed to remain in Lebanon until it is safe for them to return to their homes in Syria.	71	70	71	71	84
It is time for them to leave Lebanon whether or not it is safe for them to return.	29	30	29	29	16

And more than seven in 10 respondents also agree that Syrian refugees should be allowed to remain in Lebanon until it is safe for them to return to their homes in Syria. Again, there are no differences of opinion based on religious sect.

Methodology

The survey was conducted between September 20-29, 2021, using a face-to-face personal interview approach. A multi-stage sampling methodology (random, door-to-door sampling) was employed for selection of respondents. Urban as well as rural centers were covered to ensure a widespread geography (including Beirut—East and West, Tripoli, Nabatiyeh, Baalbek, Sayda (Sidon), Baabda, Zahlah). The sample obtained was nationally representative and was comprised of adult males and females who were 15+ years of age. A total of 869 respondents were interviewed. The margin of error is ± 3.3 .

Demographics

Male	50
Female	50
Under 30	29
30-44	33
45+	39
Less than 500 USD	28
500-1000 USD	30
1001-2000 USD	22
2001+ USD	19
Sunni	27
Shia	27
Christian	40
Druze	6

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