



New innovations in public opinion research in the broader Mediterranean region

Elizabeth R. Nugent

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REVIEW ARTICLE

New innovations in public opinion research in the broader Mediterranean region

The taming of democracy assistance: Why democracy promotion does not confront dictators, by Sarah Bush, Cambridge University Press, Cambridge, 2015, 288 pages, \$34.99 (paperback), ISBN 9781107069640

The price of a vote in the Middle East, by Daniel Corstange, Cambridge University Press, New York, 2016, 276 pages, \$99.99 (hardback), ISBN 9781107106673

Public opinion in the Middle East: Survey research and the political orientations of ordinary citizens, by Mark Tessler, Indiana University Press, Bloomington, 2011, 400 pages, \$30.00 (paperback), ISBN 9780253223159

The academic study of public opinion in the broader Mediterranean and Middle East has flourished in recent decades. Seismic shifts in the region and methodological advancements in political science have created new interest in public opinion research, and polling has become more feasible and less expensive than in the past. However, with the proliferation of public opinion research comes a number of important methodological and ethical challenges for scholars to keep in mind when conducting and evaluating this type of work. This essay traces the historic trajectory of academic research on public opinion in the broader Middle East. It demonstrates the current state of research by highlighting the research agendas of two prominent, path-breaking scholars. Finally, it concludes with a reflection on future prospects for public opinion research in the region.

A brief history of the study of public opinion in the Middle East

Mark Tessler is considered one of the pioneers of survey research in the Middle East and his most recent book, *Public Opinion in the Middle East*, serves as an informative history of the origins and evolution of public opinion in the region. The book is a collection of 13 single- and co-authored articles previously published in other academic venues. The chapters nicely document developments in the field of Middle East public opinion in recent decades, and Tessler's introduction to the collection shares a number of important lessons learned during his nearly half a century worth of experience. As such, it is a particularly useful read for scholars who are new to this subject. The development of the field of public opinion research in the broader Middle East reveals the evolution of assumptions about the region and the influence

of political dynamics between the region and the West. Read in order, the chapters document the evolution of both political methodology and the questions addressed by scholars of the Middle East through public opinion research.

Methodologically, surveys in the Middle East began with small, non-representative samples, the selection of which was carefully considered and designed to shed light on the views of ordinary citizens, given the limited availability of resources. Later chapters increasingly rely on nationally representative data, and much of the work draws on the Arab Barometer, which Tessler established with Amaney Jamal, the University of Michigan, Princeton University and local partners in 2005. The Arab Barometer is a rigorous comparative survey developed in consultation with the Global Barometer Project currently in its fourth wave of data collection.

The objects of public opinion research have evolved in parallel with regional and global political currents, suggesting that even if scholars follow disciplinary developments and trends, the research agenda also reflects real-world events. The book is divided into three topical areas of public opinion research: first, domestic politics, including democracy and governance issues; second, political culture and Islam; and third, international conflict, including the Arab–Israeli conflict. Scholars first focused on explaining the phenomena of Arab socialism and mobilization strategies of Arab regimes under strong, paternalistic leaders during the peak and decline in their popularity in the 1970s. Next, scholars sought to understand the popular shift in support for Islamist movements beginning in the 1980s. Beginning in the 1990s and particularly after the attacks of 11 September 2001, the focus has been on explaining the lack of democratization in the Middle East.

The collective body of Tessler's work represented in this book demonstrates that public opinion research in the broader Middle East has made a strong rebuttal to the essentialist arguments that predominated previously. These arguments, epitomized in the work of Samuel Huntington, attribute the lack of democracy in the Middle East to Islamic or Arab culture, which are argued to devalue pluralism, disrespect minority rights and institutionalize women's disempowerment. Contemporary debates about the region demonstrate that essentialist arguments continue to hold sway. However, since the 1970s, Tessler has been at the forefront of addressing the lack of data and corresponding lack of insight into these questions.

Recent innovations in regional public opinion research

The work highlighted in Tessler's book focuses on attitudes as the object of analysis. In this section, I highlight two research agendas that rely on public opinion evidence to support broader behavioral arguments. These agendas also incorporate experimental survey methods in line with recent disciplinary advances and design-based approaches for claiming causal inference.

Daniel Corstange incorporates public opinion evidence into a broader agenda focused on the relationship between ethnicity and clientelism. In *The Price of a Vote in the Middle East: Clientelism and Communal Politics in Lebanon and Yemen*, Corstange analyzes what determines variation in the quality and nature of goods provided to constituents in relationships of ethnic political favoritism. His argument centers on the explanatory power of elite competition within ethnic groups. When elites

form ethnic monopsonies – defined as a political constituency demarcated along communal lines and dominated by a single, vote-buying patron or party – they are able to offer minimal rewards for political support. In these situations, intra-ethnic competition is absent, and elites do not risk being outbid by rival patrons. As a result, these elites are able to offer less lucrative pay-offs for constituents' support, and it is constituents who must compete with each other for limited patronage resources. In contrast, when multiple ethnic elite groups exist, elites do the competing and bid over the same voters, and thus offer higher quality goods to woo constituents who can credibly choose an alternative patron. Corstange analyzes these questions in Lebanon and Yemen, exploiting both cross-national and within-country variation in ethnic competition to convincingly analyze how monopsonies affect the quality of goods provided to ethnic patrons.

In making his argument, Corstange draws on an impressive wealth of original data collected during two years of in-country field research. The author relies on data from two nationally representative surveys to piece together what he calls the 'client's side' of the story, demonstrating which constituents get what, how much constituents get and how constituents compete for limited ethnic patronage. The instruments were carefully designed and provide rich evidence to flesh out the mechanisms suggested by the book's theory. Respondents were asked about their access to electricity and piped water and interruptions to these utility supplies. Corstange finds that those in groups with ethnic monopsonies report more interruptions than those in competitive groups. In a later chapter, respondents' subjective assessments are combined with objective consumption data, voter roll information and information about government employment to analyze how districts' levels of competition and homogeneity affect service provision in Lebanon. As expected, constituents report more and better services when districts are more diverse, meaning that elite competition for loyalty exists, and thus makes voters more valuable. Finally, to test whether constituents must compete for services under ethnic monopsony, Corstange complements the survey data with an innovative behavioral measurement of constituent competition: whether or not respondents publicly display images and iconography such as party flags and posters outside of their homes, as recorded unobtrusively by the enumerator. Analyses demonstrate a correlation between these displays and patronage seeking behaviors, but only in communities with ethnic monopsonies.

In two related pieces, Corstange uses experimental survey techniques to further analyze how ethnicity matters for clientelism and communal politics. He uses an embedded list experiment, a technique designed to elicit truthful answers to sensitive questions by comparing rates of agreement or support across two different treatments with different length lists. In 'Vote Trafficking in Lebanon', the results of a list experiment reveal that over half of the Lebanese population surveyed sold their votes during the 2009 parliamentary elections, and this was consistent across sect (Corstange 2012). In 'Ethnicity on the Sleeve and Class in the Heart', an augmented list experiment reveals that respondents think about sectarian voting rights both in material and identity terms, depending on how the question is asked. When asked directly about each list item individually, respondents who are Shi'i, i.e. members of Lebanon's lowest status group, are more supportive of illiterate voting rights than

the country's favored Sunni and Christian groups. However, when individual items are concealed in the list experiment, poor people are more supportive of illiterate voting than are rich people across groups. (Corstange 2013).

Sarah Bush similarly incorporates public opinion research into a broader research agenda, one analyzing the interaction of foreign and local actors in democracy promotion programs, and the intended and unintended consequences of these programs and interactions. Bush's *The Taming of Democracy Assistance: Why Democracy Promotion Does Not Confront Dictators* asks why democracy promotion programs have gotten less confrontational over time, despite overall growth in democracy assistance spending and programs. She moves the literature on the efficacy of democracy promotion beyond an analysis of western states' self-interest and target states' characteristics, to incorporate the non-governmental organizations (NGOs) tasked with on-the-ground implementation. Bush argues that these organizations' survival incentives – namely, survival – shape democracy assistance in fundamental ways. These organizational incentives result in 'tame' democracy-assistance programs, which she identifies as activities that produce donor-pleasing outcome metrics, yet ultimately avoid direct confrontation with undemocratic rulers.

Bush develops a new typology of democracy assistance projects and supports her argument through both quantitative and qualitative empirical evidence, including existing and original cross-national and over-time data-sets of democracy assistance programs, text analysis of NGO websites to construct a visual map of the democracy promotion establishment network, and detailed case studies drawing on 152 interviews with those working in the democracy-promotion sector, conducted during a series of research trips between 2008 and 2012 in Jordan, Tunisia and Washington, DC. In addition, the author relies on a survey of 1473 high-level practitioners working in the democracy establishment conducted by the National Endowment for Democracy's World Movement for Democracy initiative. Her analyses provide convincing if brief evidence of some of the observable implications of her theory. For example, the staff of surveyed organizations reported being highly dependent on donor funding for their survival. In addition, answers differed significantly between what she terms professionals (those making a career in the democracy establishment) and non-professionals, most importantly in terms of preferences for different types of democracy promotion programs. Professionals prefer more tame democracy promotion programs, suggestive of a socialization effect which ultimately undermines the effectiveness of democracy promotion.

Bush's other work further explores the domestic components of foreign democracy promotion with micro-data and experimental survey techniques. In 'Who's There? Election Observer Identity and the Local Credibility of Elections', Bush and Lauren Prather analyze the results of a survey experiment to explore the micro-foundations of how election observers influence elections through their effect on local attitudes. The experiment varies the identity of election observers – either from the Arab League, the African Union or domestic organizations – to determine whether outside observers affect perceptions of the December 2014 presidential election in Tunisia (Bush and Prather 2018). The authors find that election observers influence local perception of elections' credibility *only* when they are perceived as both unbiased and capable of detecting fraud (in this case, the Arab League).

Taken together, works by Corstange and Bush demonstrate how combined observational and experimental evidence can help address research questions with broader significance beyond the Middle East. The pieces are important mixed-methods examples; the authors combine a wealth of different existing public opinion with other demographic, social, economic and political data, and conduct original survey and experimental research to shed light on the mechanisms of their theories and to gain additional leverage over causality.

Future prospects for public opinion research

Nearly fifty years on, the future of public opinion research in the broader Middle East is as bright as ever. Scholars have produced a sizable body of cumulative knowledge and publicly available resources for understanding public opinion in the region, on which future researchers can and should build. The Arab Barometer now includes nationally representative public opinion data from 11 Middle East countries across three waves, with a fourth wave currently under way. In addition, a number of Middle Eastern countries have been featured in recent waves of the World Values Survey. Arab Barometer and World Values Survey instruments consistently record a broad range of important political, social and economic behaviors and preferences. Many other public opinion data collection initiatives are currently underway and will provide exciting opportunities for researchers in the future.

These existing data are important public goods, and scholars should start their research here. They provide standardized, nationally representative data to compare not only within the region but with other regions. But more importantly, the existence of reliable, national data from the region allows researchers to be creative in building on this existing knowledge. Researchers can use existing data-sets to establish correlations on questions of interest, and then implement strategic and inventive sampling techniques to target populations of interest for recruitment to survey or lab experiments. Comparison with existing nationally representative data permits scholars to demonstrate the representativeness of samples and appropriately correct any bias in analyses. Instruments incorporating the exact wording of questions from the cross-national surveys permit researchers to calculate a direct comparison on measurements of important demographic information and preferences. For example, in 'Using the Qur'an to Empower Arab Women? Theory and Experimental Evidence from Egypt', Amaney Jamal, Tarek Masoud and I first demonstrate high levels of egalitarian attitudes towards women in Arab countries compared to the United States and China, using World Values Survey data, to motivate our paper and our inquiry. We later present the results of a large-scale survey experiment conducted among adult Egyptians exposing respondents to different Qur'anic and scientific arguments about female empowerment to test whether those egalitarian attitudes can be shifted. In an appendix, we compare our sample to the Arab Barometer sample to demonstrate its comparability on important indicators such as religiosity and gender. (Masoud et al. 2016).

Building on existing data-sets can be particularly helpful for graduate students with limited research budgets and who continue to face increasingly scarce social science resources. While a nationally representative survey of around 1000 respondents

starts around \$30,000, targeted and creative sampling significantly reduces the costs without reducing the data's scientific validity. For 'Defining political choices: Tunisia's second democratic elections from the ground up', Chantal Berman and I worked in partnership with a local NGO, *Sawty Sawt Chebab Tunis*, to collect an exit survey with responses from nearly 1200 voters in 5 governorates on the day of Tunisia's first legislative elections in October 2014 for just over \$5000. In our paper, we again compare the samples to the nationally representative Arab Barometer sample to discuss the generalizability and validity of our conclusions. (Berman and Nugent 2015).

Finally, increased local capacity to measure public opinion and greater access to Middle Eastern populations through online platforms present new research opportunities. Local capacity has increased with the growth of research firms and institutes capable of conducting high-quality research. These professionals can work with political scientists to train enumerators (many of who are employed on multiple projects), construct nationally representative samples, implement complex randomization and deliver cleaned data, although these services can be quite expensive. The existence of these institutions does not absolve an individual researcher of responsibility and oversight, but streamlines and professionalizes the processes. Each country covered in the Arab Barometer and World Values survey has at least one institution capable of conducting large-scale surveys, and the lists of these partners on each initiative's website is a good place for researchers to begin. New technologies and online platforms offer scholars the ability to recruit participants through mediums such as Facebook and Twitter. The samples should, of course, be treated with caution; a growing body of methodological literature suggests social media samples suffer from 'structural bias' (Tufekci 2013), which stems from the limited range of individuals present and thus available to researchers through these platforms. However, the ease of use and low cost make this a good channel for experimental and observational surveys in combination with existing, more representative data that can help to correct any bias.

Continuing ethical and methodological challenges of public opinion research in the broader Middle East

Despite a number of exciting opportunities, scholars of public opinion in the broader Middle East region continue to face two main considerations – a potential ethical dilemma and a methodological challenge. The act of conducting public opinion research in the broader Middle East first and foremost poses real ethical dilemmas. Adequately confronting these dilemmas requires true commitment to respondents' privacy and a contextual understanding of the risks involved in participating in our research. Researchers conducting surveys in the region operate in authoritarian environments, where information about dissenting opinion and opposition activity can threaten the lives or livelihoods of respondents if these data fall into the wrong hands. Measurements of these opinions and behaviors are exactly the information researchers hope to obtain through survey research, and have generally become even more challenging to regimes since the 2011 uprisings. Survey work, whether conducted online or through face-to-face interviews, can potentially identify regime dissenters and expose them to real harm if researchers are not diligent to keep participants' responses, locations and identities confidential.

Institutional Review Board applications often ask about increased risk resulting from participation in a study, and scholars should take these questions seriously, bearing in mind that these risks are significantly costlier in authoritarian contexts like those in the broader Middle East. For example, scholars must not only ensure that local partner firms will properly anonymize respondents' survey answers, but also make sure that the firm has protocols in place for dealing with local police who may harass enumerators as they conduct the survey and respondents after they have participated. Scholars will want to be present and highly involved while surveys are being conducted. Most survey firms will, for good reason, prevent visibly foreign researchers from accompanying teams of enumerators into the field for fear of influencing respondents' answers, but will allow scholars to observe operations from the home office. In addition, scholars must weigh the ethical costs and benefits in using hypothetical language or deception in survey experiments. This may require scholars to go beyond standard protocols about proper debriefings, to work with local partner firms, conduct exhaustive focus groups and consult professional and personal acquaintances to ensure that translations and survey procedures do not adversely affect research subjects.

Finally, scholars of public opinion in the Middle East continue to face a serious methodological challenge. Despite – or perhaps, because of – new opportunities, area expertise must remain a necessary methodological tool for conducting internally and externally valid research. For the Middle East, area expertise includes a combination of a high level of language competency (specifically in Arabic, the language with the most currency and in which surveys will most likely be conducted), experience on the ground, academic and personal networks and a general understanding of the region's politics, history and societal and economic organization. The skills valued by area expertise are not only valuable for creating research that resonates with the societies in which we conduct these projects. They are also important for methodological considerations central to political science research, such as concept validity, correctly specifying models and interpreting results, outlining plausible mechanisms and discussing the academic and real-world implications of findings. Deep area knowledge is essential to understanding, for example, how certain gender norms explain patterns of responses (Benstead et al. 2015); how enumerator gender must be considered while analyzing survey answers as a potential source of heterogeneous treatment effects (Blaydes & Gillum 2013); and for correctly specifying questions about support for political Islam to most accurately capture respondents' understanding of these concepts (Fair et al. 2017).

As Tessler notes, there has long been an intellectual pull between area studies and social sciences, and there is significantly more agreement in the academy that both area expertise and social scientific methods and theories makes for the best research than existed a decade ago. However, the emphasis among political scientists remains on developing scientific methodological skills at the expense of area expertise. This is evident in the courses departments offer and prioritize, and how departments give students little time or credit for pursuing course in Middle East language, history, culture or politics outside of the department. Many political science programs have similarly done away with requirements for those developing an area expertise to demonstrate it either through specific coursework, fieldwork or language proficiency. The emphasis on methodological skills over area expertise

may very well be justified. If the object of graduate training in political science is to demonstrate mastery of the analytical and theoretical skills required by the discipline, students may need to develop area expertise either before beginning social science training, during summers or by pursuing additional opportunities outside the department during graduate training.

Yet, as many of the pieces summarized in this article demonstrate, area expertise remains central to good political science research. Scholars who take this approach seriously base their empirical inquiries and findings on years of personal and professional experience on the ground in the Middle East. Neither statistical know-how nor area expertise is sufficient individually; rather, the mastery of *both* skills is necessary for conducting methodologically rigorous and intellectually sound public opinion research. The balance between the two is less an issue of rote knowledge and rather one of academic integrity. Scholars' responsibility towards our research subjects is of the utmost importance in a region where the conclusions and interpretations of research have important political and policy consequences, and can directly affect our research subjects' lives.

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Elizabeth R. Nugent
*Belfer Center for Science and International Affairs, Harvard University's John
 F. Kennedy School of Government*
 elizabeth_nugent@hks.harvard.edu

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