

Arab Barometer VI

Tunisia Country Report



2021

Executive Summary

The July 2021 political events in Tunisia were not entirely unexpected given the country's ongoing challenges on a number of fronts. Deteriorating economic conditions combined with the high death toll from the COVID pandemic crystalized failure of the political system to address the basic problems facing ordinary Tunisians. The failure to undertake needed reforms over the past decade produced a situation where many Tunisians celebrated a major change in the political system.

Results from Arab Barometer surveys demonstrate the degree to which Tunisians are frustrated with the performance of their government. Over the course of three surveys conducted between July 2020 and March 2021, the downward trend is clear. Last summer, before Tunisia had experienced a significant number of COVID infections, citizens were relatively pleased with the government's handling of the crisis. The government's performance on this issue was relatively strong, particularly compared with major outbreaks that had ravaged countries such as the U.S., Italy, and Spain at the time.

Yet, as the first and second waves of the pandemic hit Tunisia, citizens began to lose faith in their government and its ability to manage the public health crisis. Views of the government's handling fell by 34 points between July and October 2020 and only recovered slightly by March 2021, shortly before the onset of the largest wave of infections to hit Tunisia to date. Surely, ratings of the government's handling fell further after this survey.

The surveys make clear that Tunisians are deeply worried about the spread of COVID, yet this has not been their primary concern over the past year. In none of the three surveys did concern about COVID exceed concern about the country's economic situation. In October 2020, during a wave of infections, an equal percentage of Tunisians were primarily concerned about COVID and the economy. However, in the July 2020 and March 2021 surveys, concern about the economy was far higher than for COVID. This is due to the fact that fewer than one-in-ten Tunisians rate economic conditions as good, which continues a long but steady decline on this measure over the last decade.

The challenge of COVID has also exacerbated the economic situation. Arab Barometer's surveys make clear that citizens perceive an increase in economic inequality as a result of the pandemic. Most agree that the effects of COVID have been significantly greater on those who are poor and other disadvantaged groups such as migrants. Similarly, the effects on employment appear to be greater on those who are poorer than the better off in society.

The situation has also affected views of the education and health care systems. As COVID has stressed hospitals and the school year has been affected, citizens are less likely to rate either system as good in March 2021 compared with July 2020.

Meanwhile, many citizens are concerned that their basic civil rights are not ensured. Despite having their basic rights enshrined in the constitution, just half say the ability to demonstrate peacefully is guaranteed. In part, this may be due to restrictions on gathering put in place to limit the spread of COVID. However, the violent police crackdowns on demonstrators that had started even before the pandemic likely also play a role.

Addressing the myriad concerns of Tunisians will be difficult, but the surveys also point out some of the particular challenges faced by women. One long-standing issue remains the relatively low labor force participation rate for women in Tunisia and across MENA more broadly. Results from Arab Barometer demonstrate that rather than cultural barriers, Tunisians believe the most pressing limitations on women entering the workforce are lack of transportation, lack of childcare, and relatively low wages.

In world affairs, Tunisians hold positive views of a number of foreign countries, in particular Germany, China, and Turkey. However, across a range of questions, Germany is the clear winner. Views of the U.S. and France are less positive, but are more positive than for Saudi Arabia or Iran.

These are among the main findings of three nationally representative telephone surveys conducted in Tunisia during the course of 2020-1. The sample was drawn through random digit dialing (RDD). Between July 2020 and March 2021, we interviewed 3,208 Tunisian citizens to track changes in their evaluations of their conditions over time during the pandemic. The margin of error of these reported results is ± 3 percentage points. The surveys are part of Arab Barometer's sixth wave which was carried out in seven MENA countries. Arab Barometer's sixth wave is the only publicly available survey that captures the changing sentiments of citizens across MENA during the unprecedented times of the COVID-19 pandemic. Additional information about the surveys can be found in the links below:

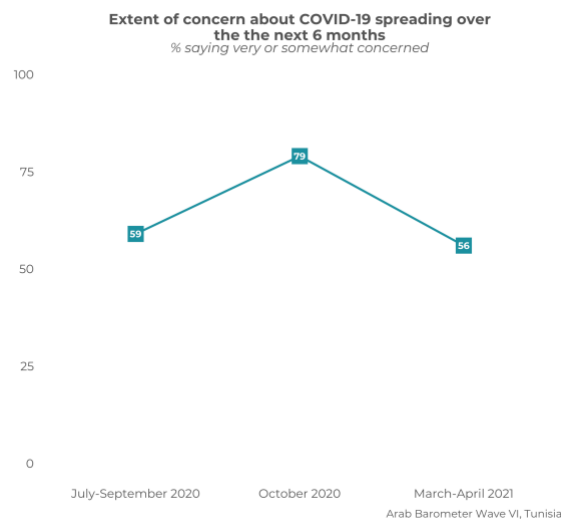
About AB6
How we did this

COVID in Tunisia

Tunisia initially managed the COVID outbreak relatively well. The country's lockdown resulted in relatively few cases through the summer of 2020. However, in the time since, Tunisia has experienced multiple waves of infection with spikes in September 2020, December 2020, April 2021, and June 2021.

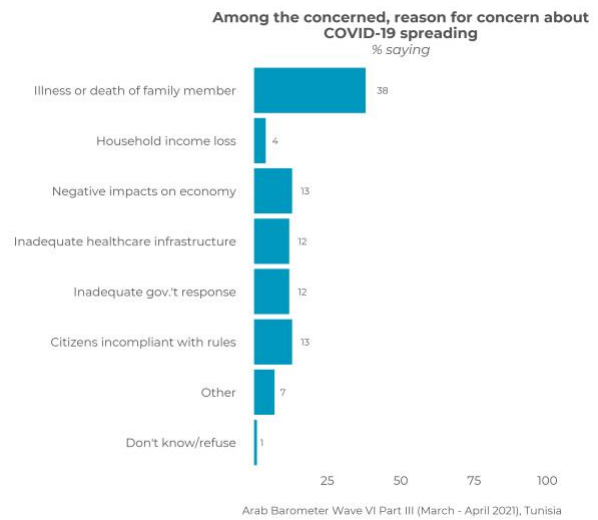
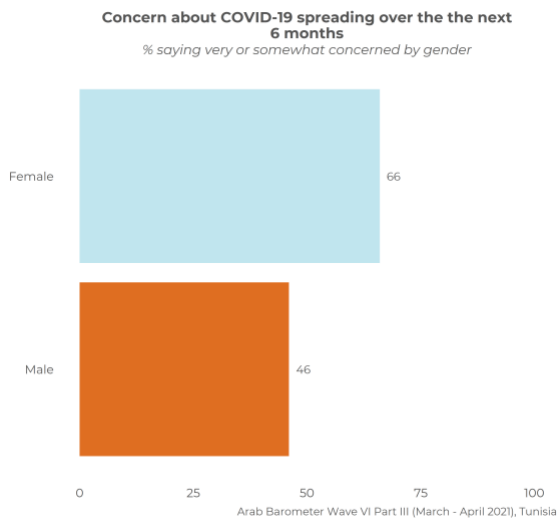
Initially, Tunisians gave significant credit to the government for managing the COVID outbreak. A majority of 58 percent rated the government's performance on this issue as good in July 2020, but this rate dropped to just a quarter (24 percent) by October 2020, which was during the peak of the first wave of the virus in the country. This rate recovered somewhat (31 percent) in March 2021, when Arab Barometer surveyed Tunisians between the second and third waves of COVID in the country.

Concern about COVID in Tunisia is also linked with the degree to which the pandemic was affecting the country. In July 2020, before the first wave of infection, 59 percent of Tunisians said they were concerned about the spread of COVID in their country. By October of the same year, during the peak of the first wave, Tunisians were substantially more likely to fear the spread of the virus (79 percent), although this rate declined significantly by March following the second wave (56 percent). In sum, Tunisians' fear and ratings of government performance have changed in line with the degree to which COVID is spreading in their country.

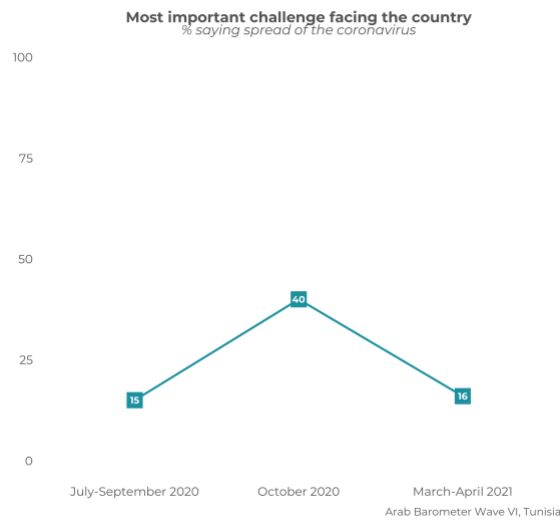


Notably, women are significantly more concerned about COVID overall than men. In July 2020, women were 18 points more likely to say they were worried, compared with 16 points in October 2020 and 20 points in March 2021. This

difference by gender extends to most other countries in the region, suggesting that COVID has had different effects by gender in the region. Among all Tunisians who are concerned about the spread of COVID, the primary worry is about the illness or death of a family member (38 percent), while approximately equal shares fear other citizens not following government regulations (13 percent), the impact on the country’s economy (13 percent), overwhelming the healthcare system (12 percent), and an inadequate response by the government (12 percent).

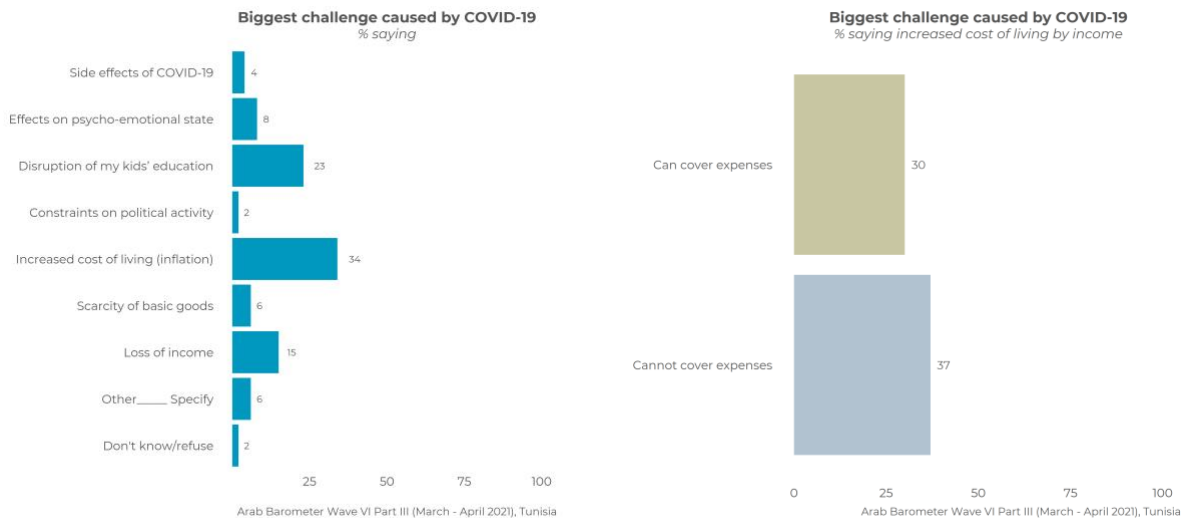


Despite a relatively high concern about COVID spreading in the coming months, few Tunisians say that COVID represents the country’s greatest challenge. In March 2021, just 16 percent named COVID compared with half (51 percent) who say the economic situation is the biggest problem facing Tunisia. This is a dramatic change from October 2020, during the peak of the first wave of infections, when four-in-ten Tunisians named COVID and the economy as the biggest challenge, respectively. However, it is similar to the levels in July 2020, before the first wave when 51 percent named the economy as the biggest challenge compared to 15 percent who said COVID.



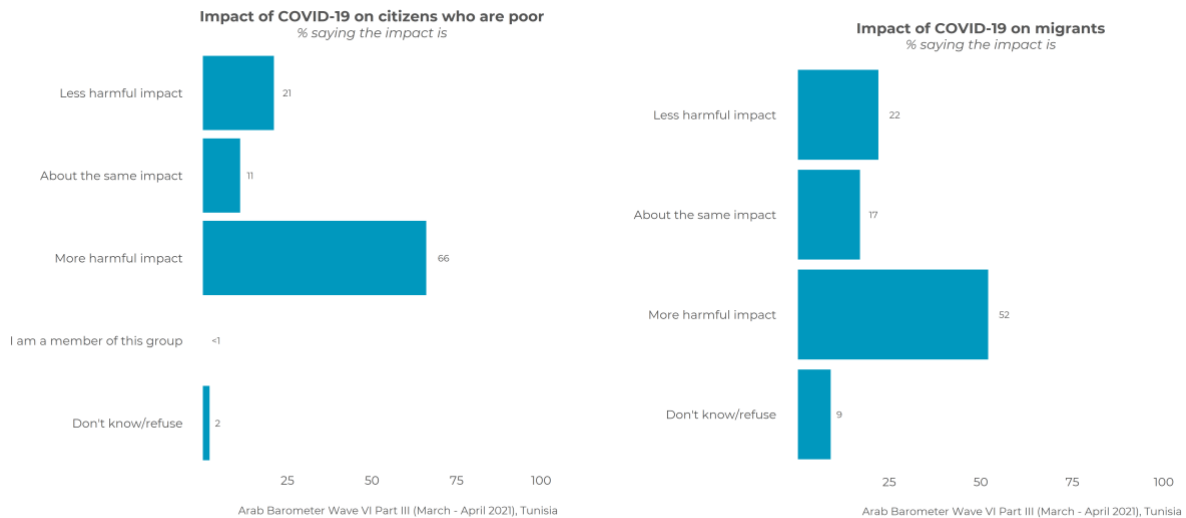
COVID and the economy

A key challenge posed by COVID on the entire region is the effect it has had on standards of living. Fully a third (34 percent) of Tunisians say that the biggest challenge from COVID is rising cost of living, which is a particular concern for those citizens whose income does not cover their expenses (37 percent) compared with those who are better off (30 percent).

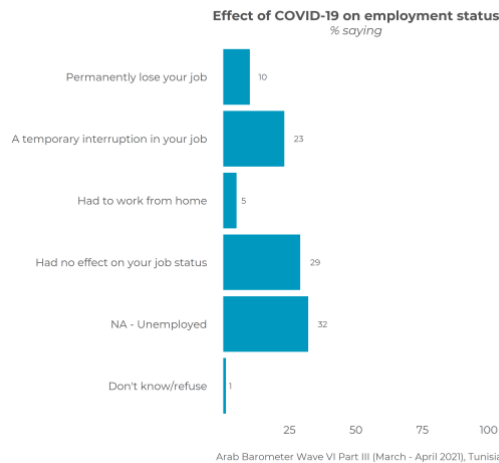


Tunisians are also keenly aware of the differential effects from COVID on groups that are less well off. Two-thirds (66 percent) say that the effect has been greater on poorer citizens than those who are better off while half (52

percent) agree that the effect has been greater on migrants compared with others in the country.



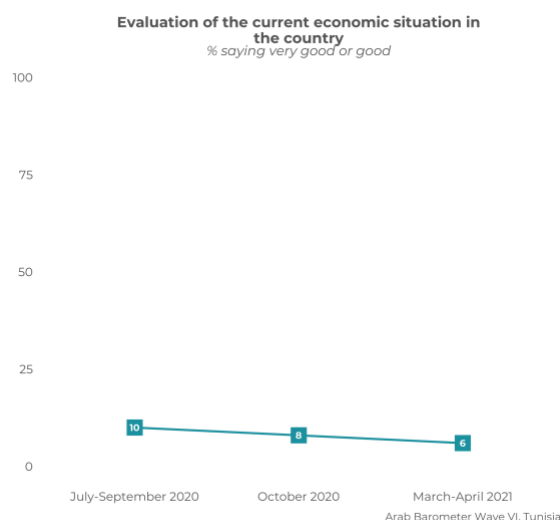
In part, this may be due to job losses due to the ongoing restrictions related to COVID. A substantial proportion report a temporary job interruption or a permanent job loss. Overall, nearly a quarter (23 percent) say they faced a temporary job interruption while 10 percent permanently lost their job, compared with 29 percent who say COVID had no effect on their employment.



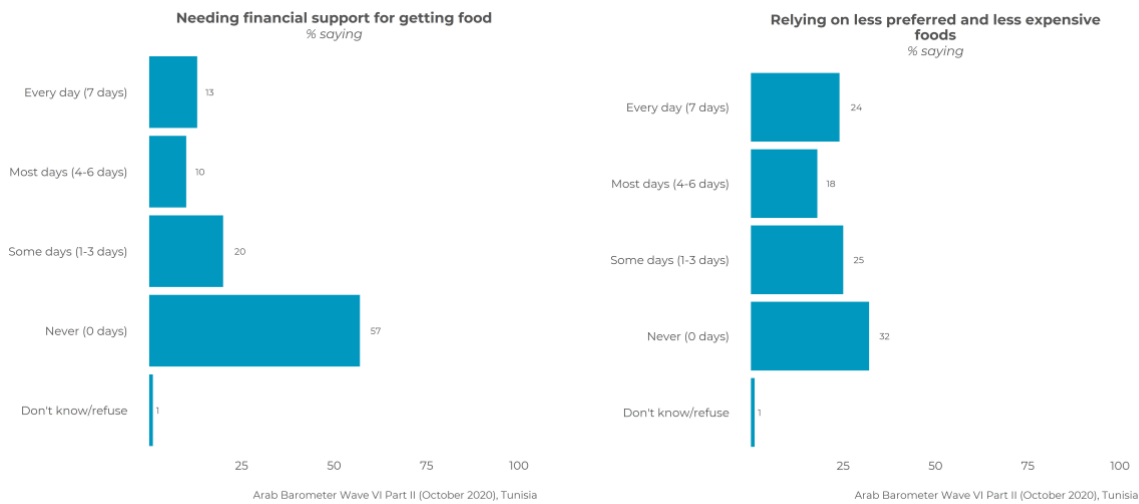
Job losses are likely to have exacerbated inequality in Tunisia. Among those who were employed before the pandemic, 18 percent who say they cannot cover their expenses experienced a job loss as a result of the pandemic. By comparison, the rate among those whose incomes covers their expenses is only eight percent.

Economic conditions

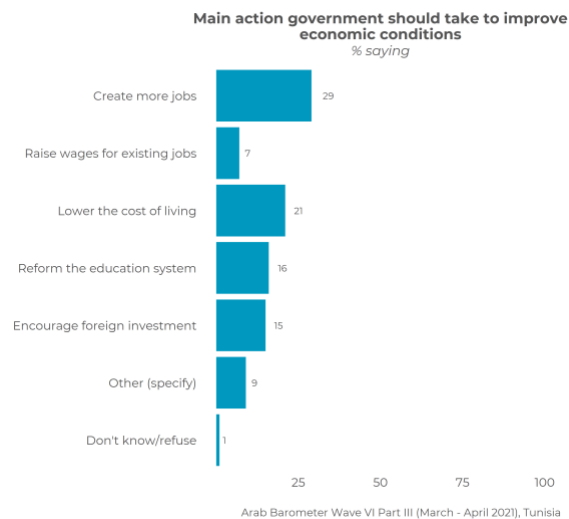
Ratings of economic conditions in Tunisia are dismal, and continue a downward trend in recent years. In all three surveys conducted in Tunisia as part of wave 6, one-in-ten or fewer rated economic conditions positively, including just six percent in March 2021. Economic challenges are also personal, with two-thirds of Tunisians in July 2020 saying they fear losing their main source of income within the next 12 months, implying that many are living in very precarious circumstances. This is especially true among those who are already struggling, with nearly three-quarters (73 percent) of those whose income does not meet their basic needs worrying about this possibility compared with half (51 percent) of those who are better off.



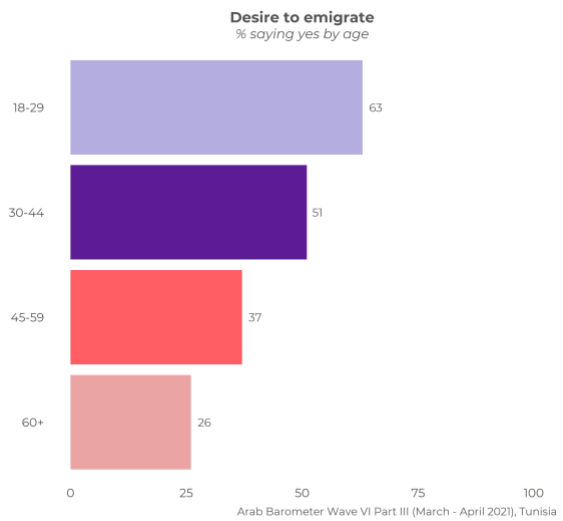
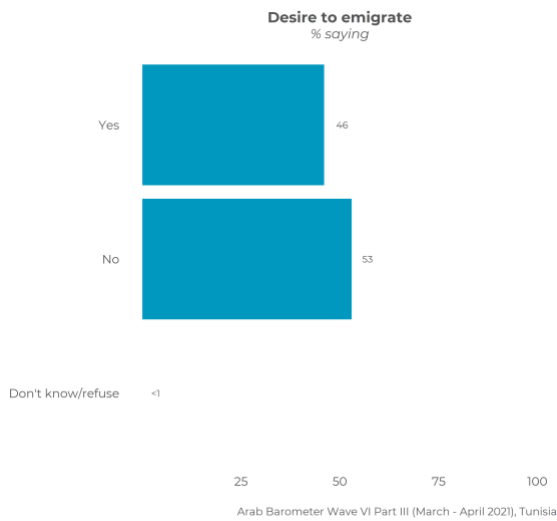
Evidence of the economic challenges are also evident from Tunisian attitudes towards food security. In March 2021, about a quarter of Tunisians (27 percent) said within the past month they have worried that their supply of food would run out before they could afford more while a similar percentage (25 percent) say that this actually happened in the past month. Meanwhile, in October 2020, four-in-ten (41 percent) said they were forced to rely on less desired or less expensive foods in the last week to try to make ends meet. An additional 22 percent report needing financial support to pay for food over the same period.



In terms of addressing economic challenges, half of Tunisians say the main priority should either be the creation of more jobs (29 percent) or controlling the cost of living (21 percent). Meanwhile, other Tunisians say educational reform (16 percent) or encouraging foreign investment (15 percent).

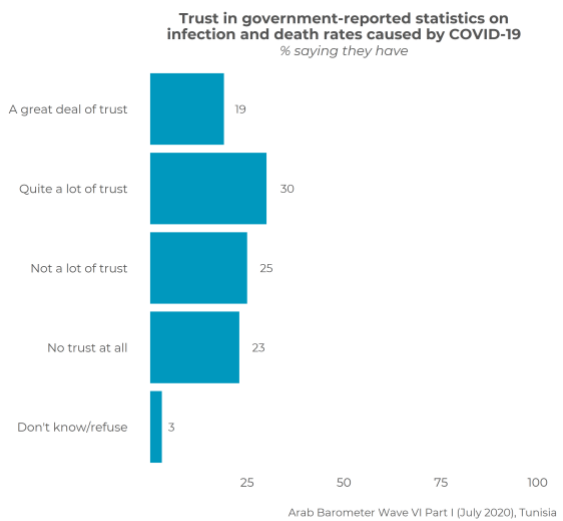
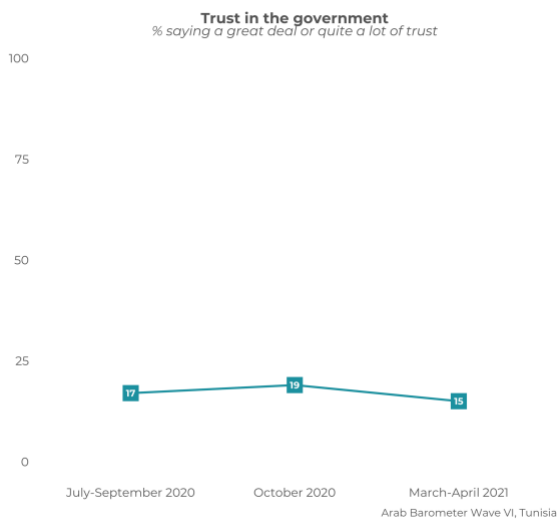


However, a large percentage of Tunisians appear to have lost confidence in the government to make the necessary economic reforms. Nearly half (46 percent) say they have considered moving to another country, with the vast majority of those (78 percent) citing economic factors as the main reason they want to leave their homeland. The desire to migrate is particularly high amongst youth, with 63 percent of those ages 18-29 considering leaving compared with 40 percent of those ages 30 and above.

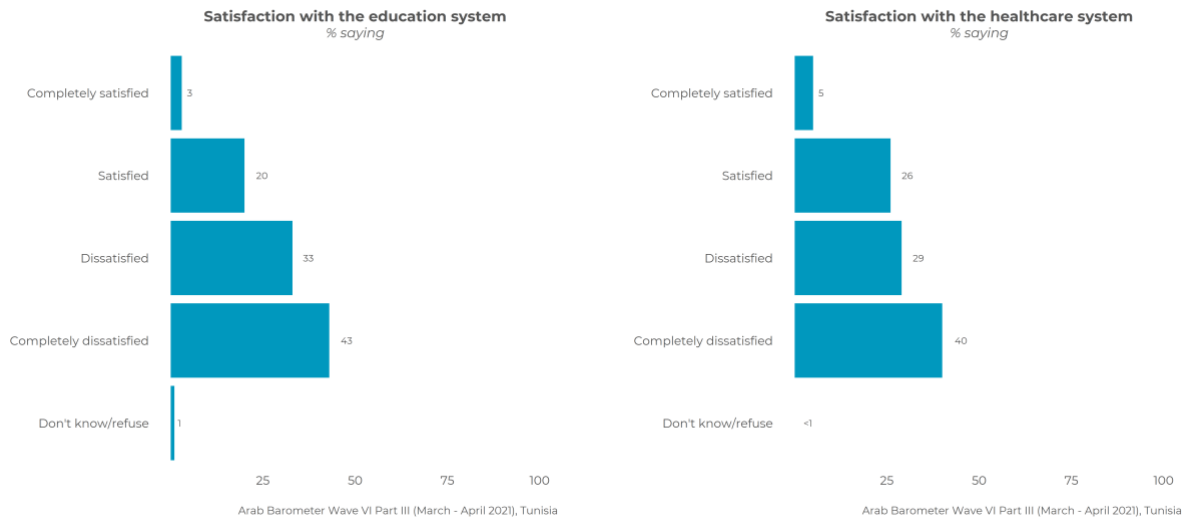


Views of Government

Despite being the most democratic country in the region, trust in government in Tunisia has been very low in recent years. Throughout the course of the pandemic, this level has remained largely unchanged, at 17 percent in July 2020, 19 percent in October 2020, and 15 percent in March 2021. Although few Tunisians have confidence in the government, there is much higher trust in the government’s reporting on COVID. Fully half (49 percent) say they have a great deal or quite a lot of trust in the official statistics from the government on the infection and death rates related to the pandemic.

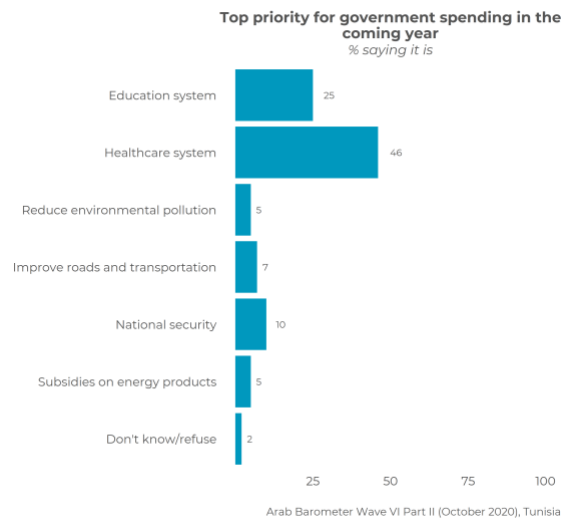


Faith in the healthcare system has also fallen in Tunisia over the course of the pandemic. In summer 2020, about four-in-ten citizens said they were satisfied or completely satisfied with healthcare. As the pandemic continued into the first wave, satisfaction dropped 12 points to 25 percent in October 2020 but rose slightly to 32 percent by March 2021. These levels correspond with levels of concern about the virus, suggesting a clear link between ratings of the healthcare system and the ability to manage the pandemic.

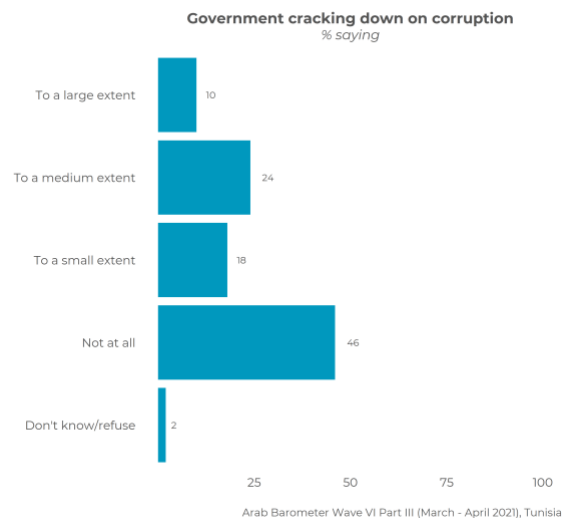
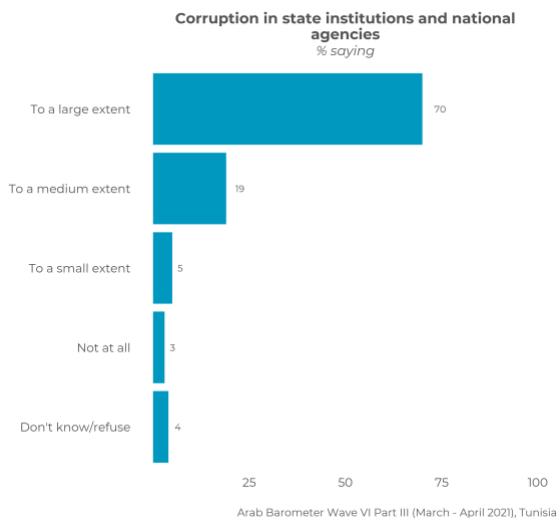


Views of the education system has also declined over the past year. Although satisfaction was relatively low to start – just three-in-ten (31 percent) were satisfied in July 2020, ratings fell throughout the course of the pandemic. In October 2020, 26 percent had a positive view compared with 23 percent in March 2021. As in many countries, the stress of educating children during the pandemic has had important effects on views of the educational system.

Unsurprisingly, citizens are demanding more spending in both of these areas. When asked about preferences for the use of government funds in the coming year, 46 percent say healthcare should be the top priority while a quarter say education. By comparison, just ten percent say national security, seven percent improving roads, and five percent the environment.

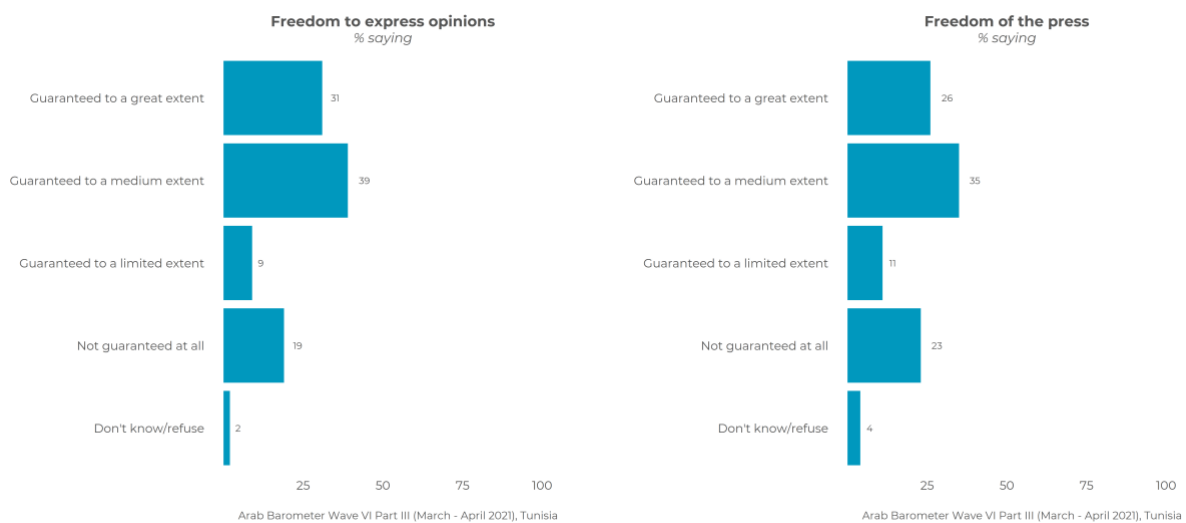


Perhaps the most significant factor in how citizens view their government remains corruption. Fully nine-in-ten (89 percent) of Tunisians say that corruption is prevalent to a large or medium extent, which is equal to the highest percentage in any country surveyed in the Arab Barometer sixth wave. Meanwhile, just a third (34 percent) believe that the government is working to address this scourge to a large or medium extent. This perceived failure to tackle what is seen as rampant corruption will continue to limit the ability of the government to be seen as legitimate in the eyes of the country's citizens.

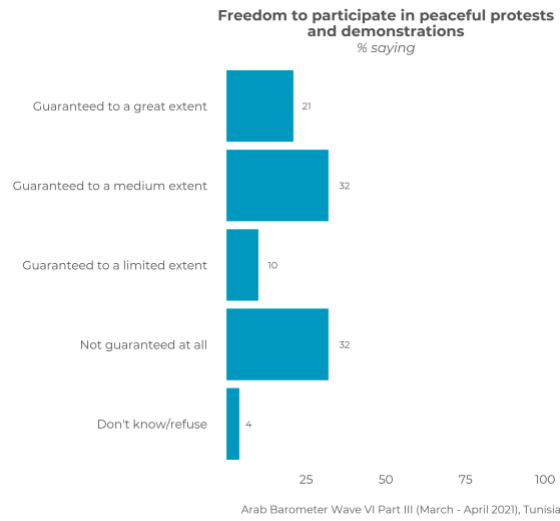


Civil Rights and Freedoms

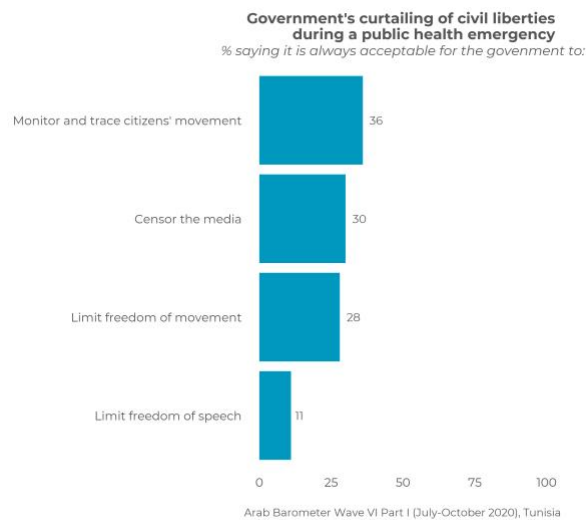
Most Tunisians believe that they have the rights to freedom of speech (70 percent) while a majority also say press freedom is protected in March 2021. Over the course of the pandemic, there has been no change in the degree to which Tunisians believe freedom of speech is guaranteed. However, the same is not true for freedom of the press. There has been a relatively small but discernable decline of 6-points in the percentage of citizens who say the media retains its freedoms, falling from 67 percent in July 2020 to 60 percent in October 2020.



Ratings of the right to participate in peaceful protests is relatively low in Tunisia, with just 53 percent saying this right is fully guaranteed in March 2021, which is effectively unchanged from October 2020 (56 percent). The relatively low rating is likely due both to a combination of COVID-related restrictions and the increasingly violent crackdowns by police and security forces on demonstrators over the past year.

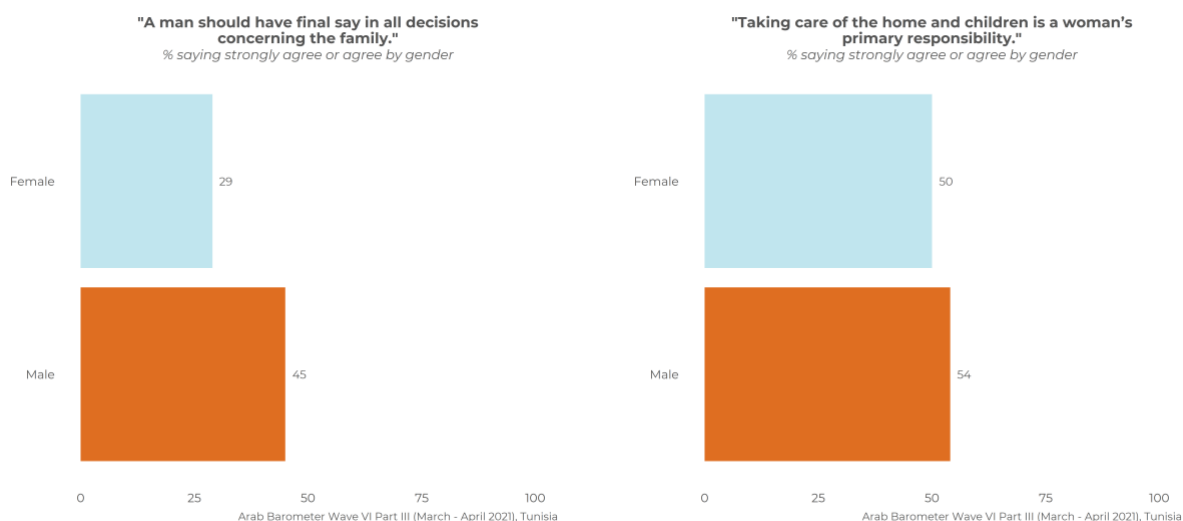


A small but substantial minority of Tunisians are willing to accept restrictions on their freedom due to a public health emergency like COVID. Approximately a third say that under such conditions it is always justifiable for the government to monitor and trace citizens' movement (36 percent) or to censor what the media is allowed to say (30 percent). Smaller percentages say it is always permissible for the government to limit the freedom of movement of citizens (28 percent) while there is very limited support for restricting freedom of speech in response to a national emergency such as COVID.



Gender and the pandemic

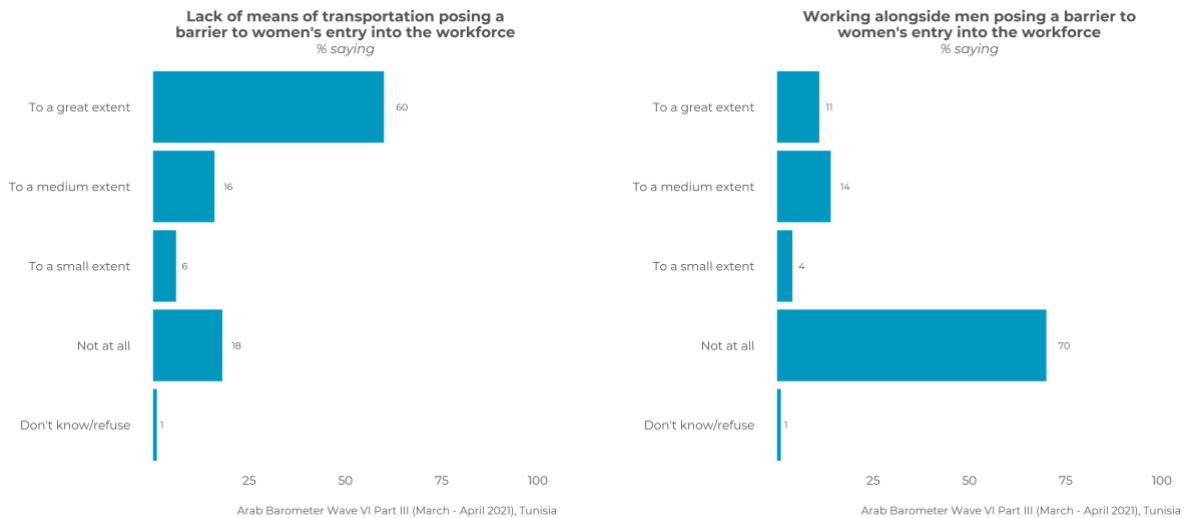
Evidence from around the world suggests that women have been under significant strain as a result of the pandemic. Tunisia is no exception. However, there remain questions about the degree to which the pandemic affected attitudes toward gender issues remains in question. In Tunisia, the survey results make clear that many still believe women should not have an equal role to men in either the private or public sphere. When asked if men should have the final say over all decisions in the family, little more than a third (37 percent) of Tunisians agree or strongly agree. Men are substantially more likely to hold this view than women (+16 points). Additionally, half of Tunisians (51 percent) affirm that taking care of the home and children is a women's primary responsibility, but notably there is not a dramatic difference between the views of men and women on this topic: 54 percent of men agree compared with half of women.



Even before COVID, the female labor force participation rate in Tunisia was low by international standards. The International Labor Organization (ILO) estimated that only 28 percent of women between the ages of 15-64 participated in the labor force. The economic challenges during COVID have placed a further burden on workers, including women.

Overall, Tunisians are more likely to cite structural barriers compared with cultural barriers. Among the five areas queried, Tunisians are most likely to say that a lack of transportation (76 percent) is the greatest barrier to women entering the workforce. The next most substantial perceived barriers are lack of childcare options (71 percent) and low wages (69 percent). By comparison,

57 percent say it is because men are given priority in hiring while just a quarter say it is mixed workplaces.

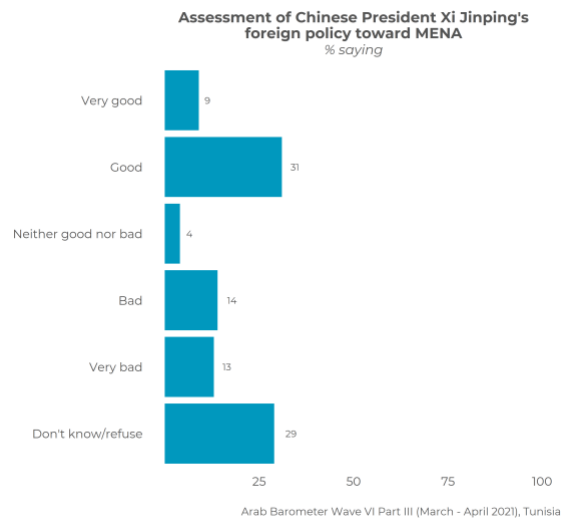
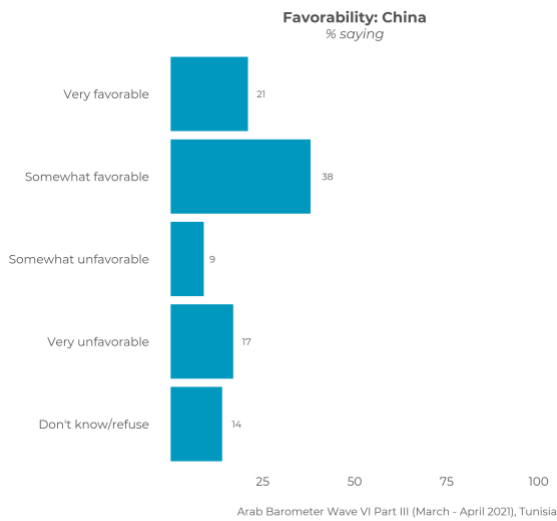


Notably, Tunisian men and women are about equally likely to agree that these barriers limit the ability for women to enter the workforce. This is true for all three structural barriers and for the possible challenge of mixed workplaces. The only gaps are found on men being given priority for jobs and low wages, with women being nine points and seven more likely to say this is a barrier compared with men, respectively. In sum, there is widespread agreement across Tunisian society about the barriers to women’s full inclusion in the workforce. And, many of the greatest perceived barriers are structural, meaning the government, local actors, and the international community could take tangible steps to improve these issues to encourage greater female labor force participation.

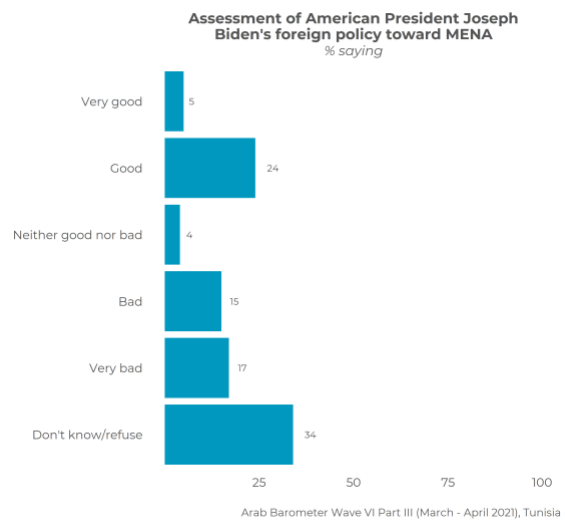
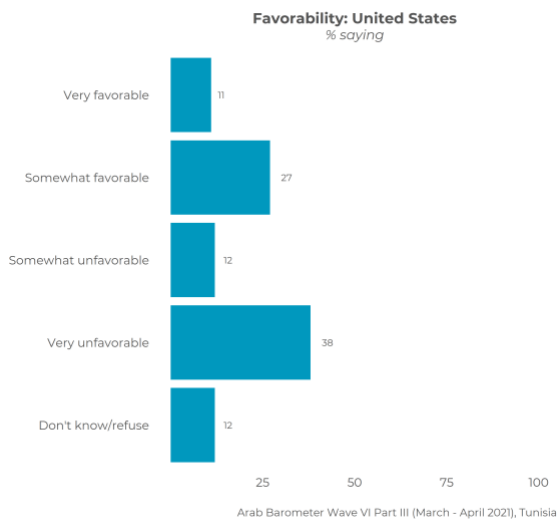
Global power competition in Tunisia

Arab Barometer included questions on views of the U.S. and China to gain insight into their competition for the hearts and minds of citizens across the region. In Tunisia, China is significantly more preferred than the U.S., although the gap between the two powers has decreased significantly following the U.S. presidential election.

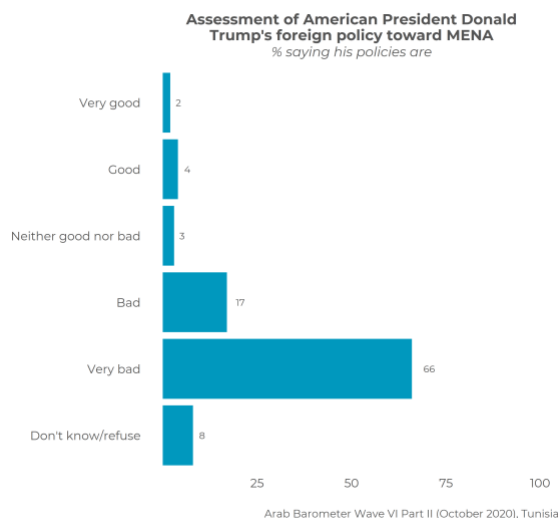
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In March 2021, nearly six-in-ten Tunisians (59 percent) held a positive view of China, which is slightly higher than in July 2020 (54 percent). Notably, views of China do not appear overly linked with attitudes toward Chinese Premier Xi Jinping toward MENA. In March 2021, just 41 percent of Tunisians say his policies toward the region have been good or very good, which is largely unchanged since July 2020 (37 percent). In short, China’s ongoing efforts at vaccine diplomacy and provision of economic aid to much of the region do not appear to have shifted the views of most Tunisians. For the most part, Tunisians were as likely to favor China in the relatively early days of the pandemic as they were nine months later.



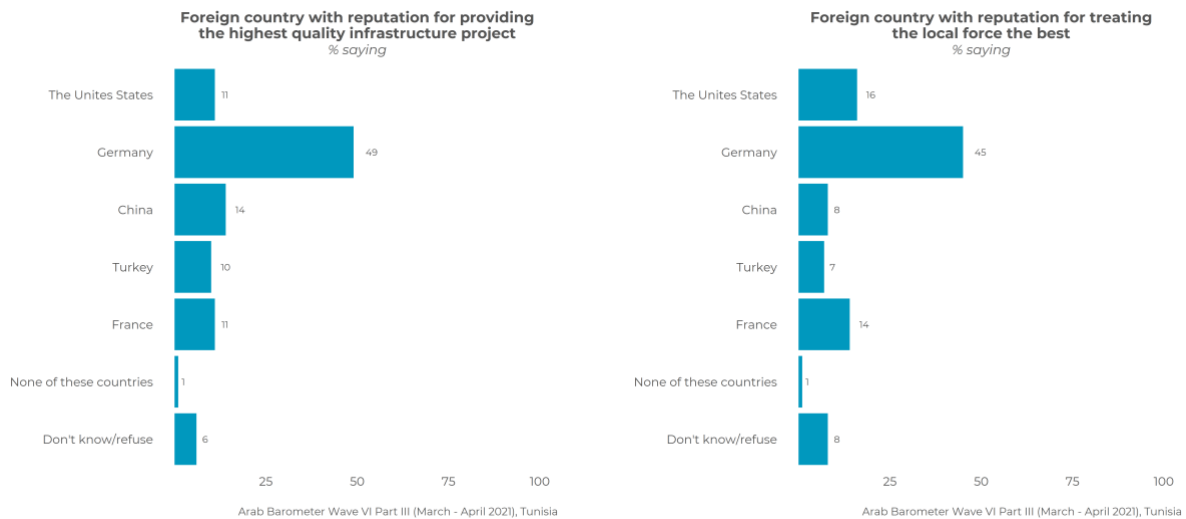
By comparison, far fewer Tunisians hold positive views toward the U.S. In March 2021, roughly four-in-ten (38 percent) held favorable views about the U.S. Notably, however, this level is nearly twice as high as in 2020, when just 21 percent of Tunisians viewed the U.S. positively. To a large extent, this difference appears to come down to U.S. leadership. When surveyed in October 2020, just six percent of Tunisians said former U.S. President Donald Trump’s foreign policies had been good or very good for the region. Meanwhile, when asked about President Joe Biden’s foreign policies toward the region in March 2021, 30 percent said they were good or very good. However, a more nuanced examination reveals the degree of change in attitudes – fully two-thirds (66 percent) of Tunisians said Trump’s policies were “very bad” for MENA compared with just 17 percent for Biden. Moreover, fully a third (34 percent) of Tunisians were unsure about Biden’s foreign policies, perhaps given that his presidency was relatively new at the time of the survey.



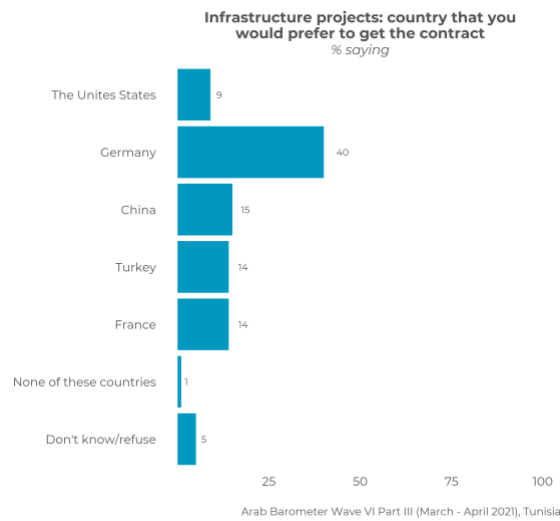
Additional evidence suggests the improving image of the U.S. in Tunisia is linked with the change in administrations. When asked in October 2020 which candidate’s policies would be better for MENA, Biden was preferred by a 40-point margin over Trump (52 percent vs. 12 percent). There is also significant hope of a change in U.S. policy toward MENA under Biden, with half (49 percent) of Tunisians saying they expect U.S. policy to change to a great or medium extent under the Biden administration.

Although views of the U.S. have improved, they still come far from matching support for China in Tunisia. One of the key areas where China is engaging MENA is through economic relations, including through its Belt and Road Initiative (BRI). China has signed a cooperation agreement with Tunisia, which could lead to greater expansion of economic relations.

Notably, relatively few Tunisians perceive China’s economic development in MENA to be a threat to them, with only 21 percent holding this view. By comparison, twice as many (43 percent) say U.S. economic development in MENA represents a threat.

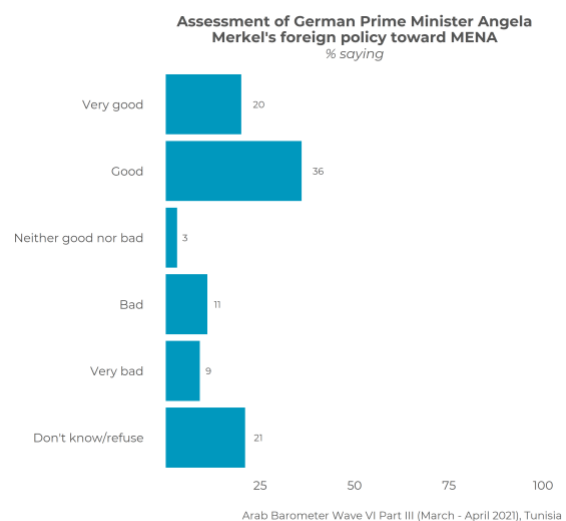
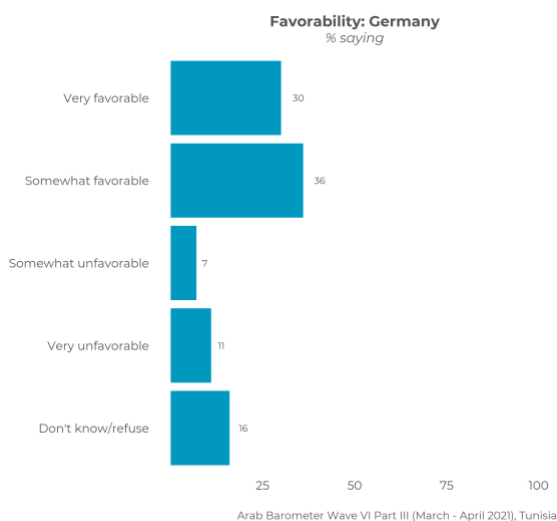


Yet, while Tunisians do not fear China economically, they also do not overly favor their presence either. Arab Barometer asked Tunisians about their preferred nationality for a foreign company building an infrastructure project in Tunisia. Among five countries listed – China, France, Germany, Turkey, and the U.S. – only 14 percent say a Chinese company would build the highest quality product. This rate is similar to the U.S. (11 percent), France (11 percent), and Turkey (10 percent), but dwarfed by Germany (49 percent). Meanwhile, when asked about the country that would pay the best wages to the local workforce, only eight percent choose China, compared with 45 percent for Germany, 16 percent for the U.S., and 14 percent for France. Finally, only 15 percent of Tunisians would prefer a Chinese company to get the contract overall, compared with 40 percent for Germany, 14 percent for Turkey, 14 percent for France, and nine percent for the U.S. In sum, despite a widespread favorability toward China, this outcome does not appear to be coming from a strong preference for Chinese economic engagement.

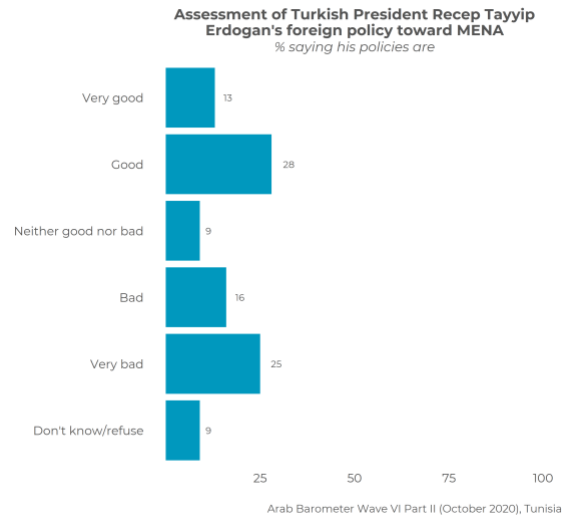
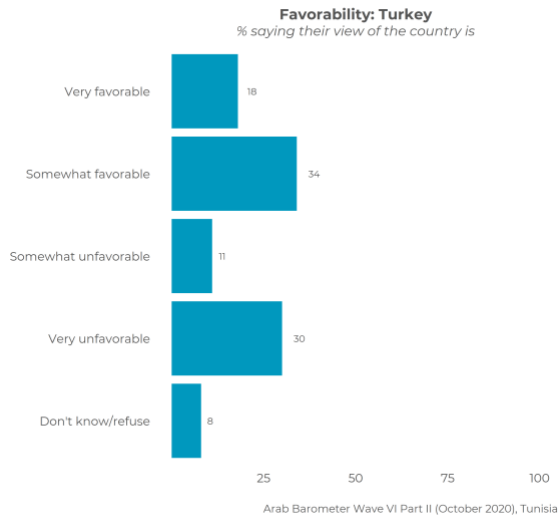


Other major powers

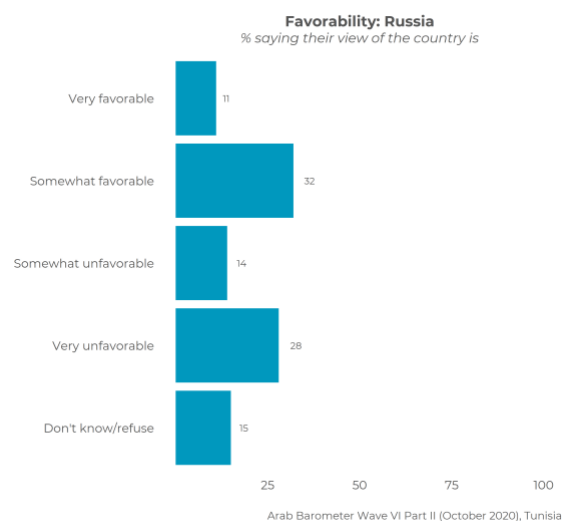
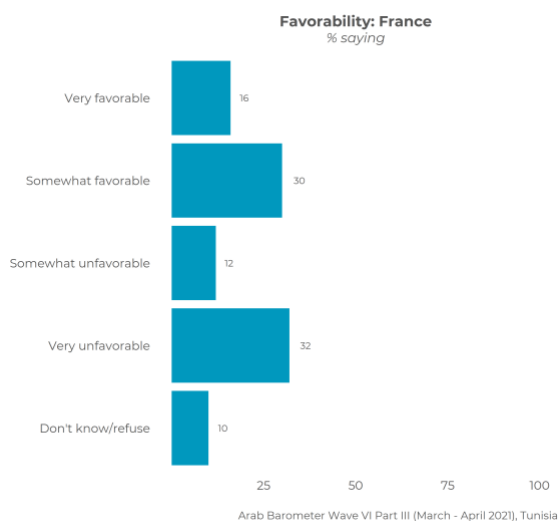
Arab Barometer included questions on the degree to which Tunisians held favorable views of eight major global and regional powers. Overall, as with many countries across MENA, citizens look most favorably toward Germany, with two-thirds (66 percent) holding a positive view of the country. Ratings of Angela Merkel are similarly high (56 percent), strongly suggesting that policies associated with her including the policy of “Willkommenskultur” toward immigrants in 2016 still resonates with citizens. Germany’s foreign assistance to Tunisia and non-colonial history in North Africa are also likely factors for this high rating.



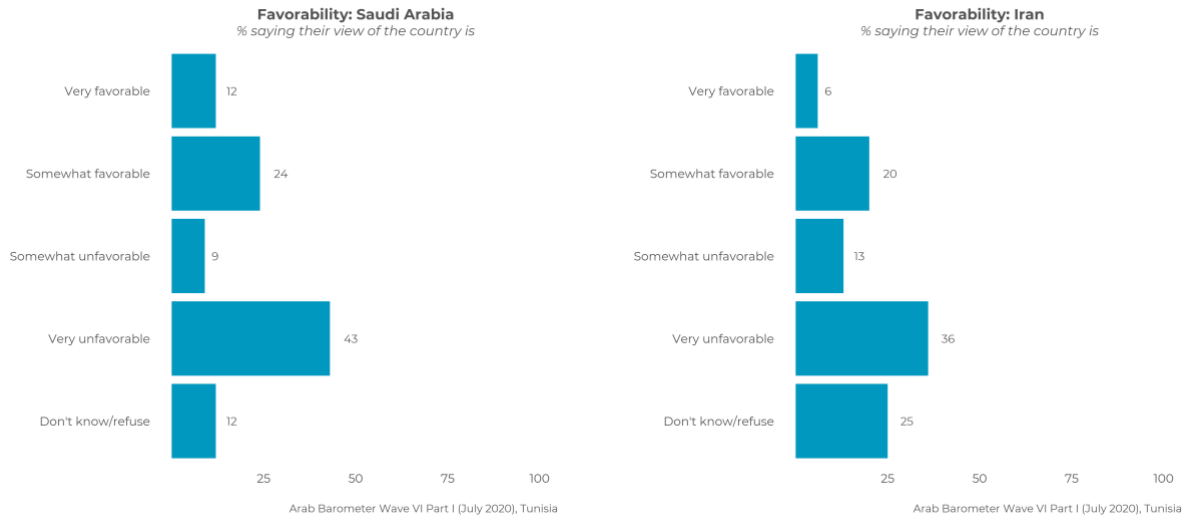
Following Germany, ratings of Turkey were the next highest among regional powers, at 52 percent. Ratings of Turkish President Recep Tayyip Erdogan’s foreign policy was somewhat lower, at 41 percent, but still higher than most other world leaders.



Despite significant differences in their policies toward the MENA region, France (46 percent) and Russia (44 percent) are viewed about equally positive by Tunisians. However, views of the presidents of both countries trail views of their countries overall by a substantial margin. Only a third of Tunisians rate the policies of Vladimir Putin positively while even fewer say the same about Emmanuel Macron (27 percent).



Among major regional powers, favorability is lowest toward Saudi Arabia and Iran. Just 36 percent of Tunisians view Saudi Arabia positively while a quarter (26 percent) say the same about Iran. Correspondingly, views of these countries' respective leadership are also quite low, with just 22 percent saying that the policies of Crown Prince Mohamed bin Salman have been good for MENA compared with 14 percent for Ayatollah Ali Khamenei.





ABOUT ARAB BAROMETER

Arab Barometer is a nonpartisan research network that provides insight into the social, political, and economic attitudes and values of ordinary citizens across the Arab world.

We have been conducting rigorous, and nationally representative public opinion surveys on probability samples of the adult populations across the Arab world since 2006 across 15 countries.

We are the longest-standing and the largest repository of publicly available data on the views of men and women in the MENA region. Our findings give a voice to the needs and concerns of Arab publics.



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