

Pakistan: Public Opinion Trends and Strategic Implications

Craig Charney

December, 2010



www.CharneyResearch.com

1133 Broadway • Suite 1321 • New York, NY 10010 • 212.929.6933 (tel) • 212.929.8995 (fax)

Sources: Pakistan

National Opinion Polls

This presentation is based on scientific, national, randomly-sampled opinion surveys taken by trained, professional Pakistani interviewers and Pakistani polling groups.

Charney Research Polls:

- Jan 2009 – 500 respondents – FATA – Columbia U Poll
- October 15 – November 3, 2008; 1199 respondents – National – Columbia U poll
- November 8 – 30, 2006; 1214 Respondents— National – Columbia U poll

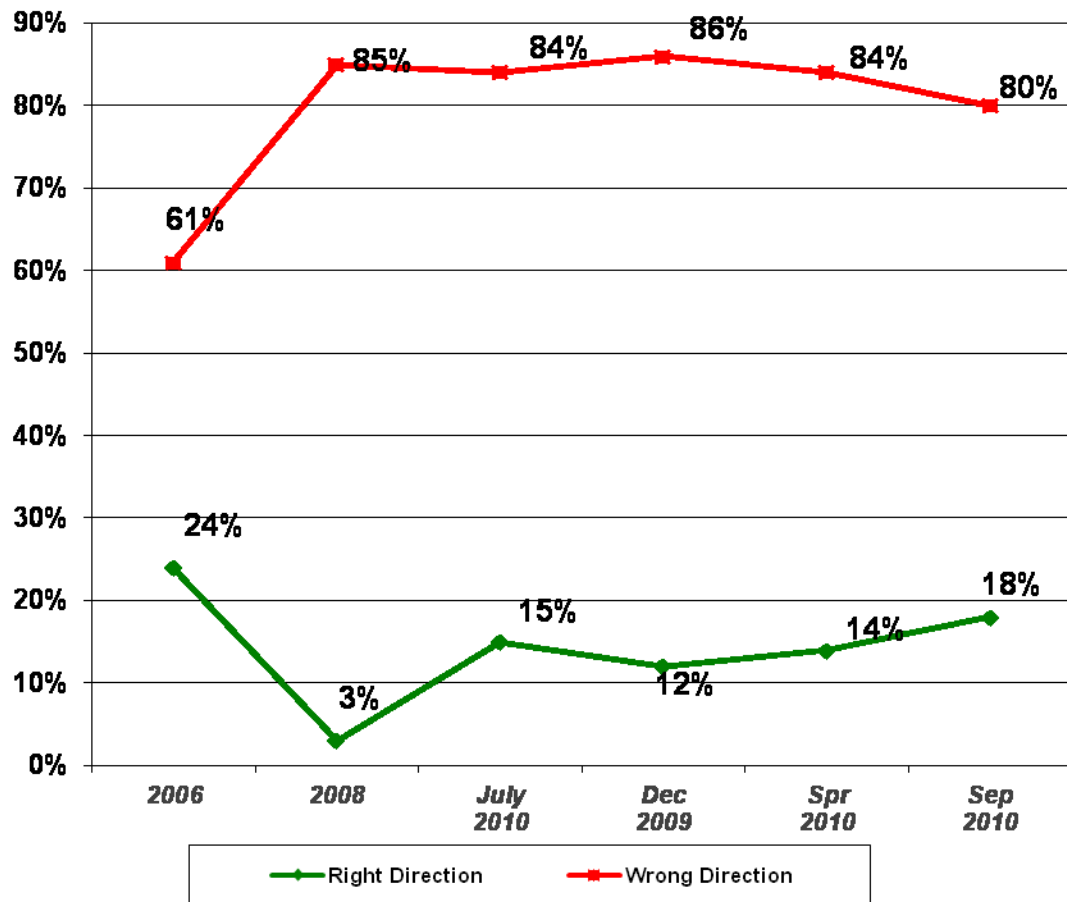
Other Polls:

- Sept 2010 – 2500 respondents – Gallup poll
- July 2010 – 1000 respondents – NAF Poll
- Apr 2010 – 2000 respondents – Pew Poll
- Dec 2009 – 4600 respondents – IRI poll
- Dec 2009: 1147 respondents --Gallup poll
- Jul 2009 – 2500 respondents – Gallup poll
- Jul 15 – Aug 7 2009: 4,900 respondents – IRI survey

- Jun 2009: 1133 respondents – Gallup poll
- May 22 - Jun 9 2009: 1,254 respondents- Pew Global Center Survey
- March 7-30 2009: 3,500 respondents - IRI survey
- May 25th – June 1, 2008—1,306 Pakistanis. Terror Free Tomorrow Survey.
- April 24 -- May 26, 2008—4000 Adults—State Department Survey
- January 19 to January 29, 2008—1,157 Pakistanis, Terror Free Tomorrow Survey.
- Oct 2007 – Major urban areas – Pew Global Center Survey.
- IRI Index Polls: October 2008, June 2008, January 2008, September 2007, June 2007, February 2007, September 2006, June 2006

Pakistan's mood is very negative, due to the economic crisis, violence, and poor public services.

Generally speaking, do you think things in Pakistan are going in the right direction or wrong direction?



Pakistan's Biggest Problems

Reasons given by 10% or more (Dec 09)

Economy: 67%

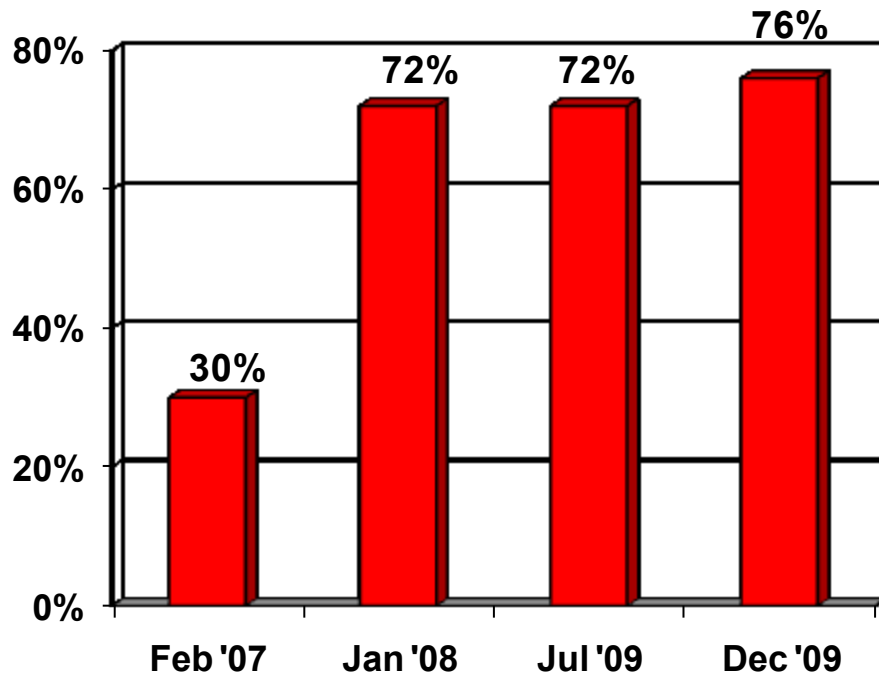
Terrorism / Law and Order: 28%

Electricity and Water: 1%

Dramatic economic deterioration has stressed many families, shredding opportunities and hope.

In the past year, has your personal economic situation improved, worsened or stayed the same?

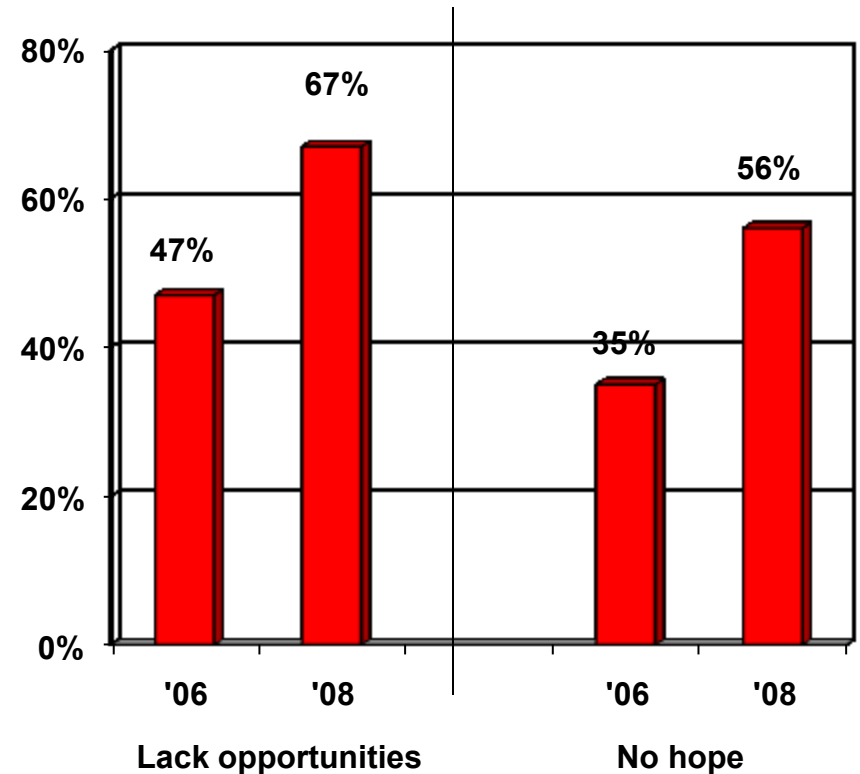
Percent saying worsened



Do most people in the area where you live ...

Have real opportunities to improve their lives?

Have much hope for the future?

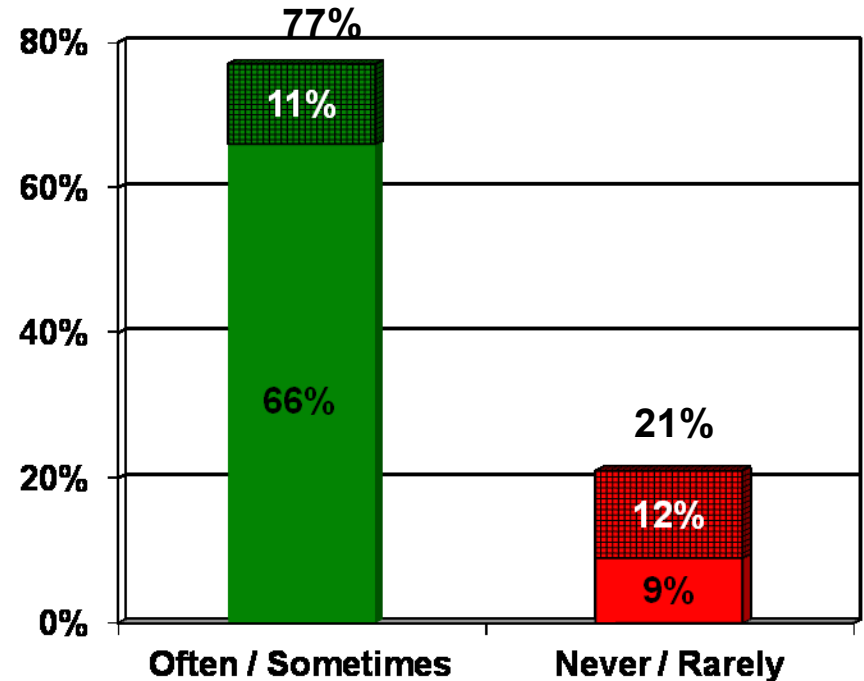
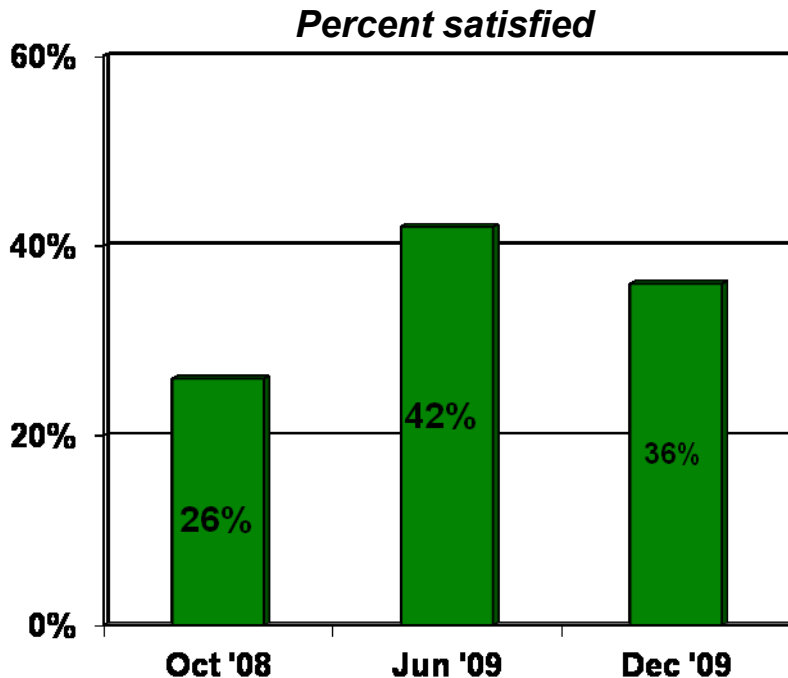


Pakistanis think their country has done a bad job on terrorism and fear for their safety.

How would you rate the work Pakistan is doing to oppose terrorism by Islamists? (Oct '08)

Do you think the government is doing enough to fight terrorism (Jun, Dec 09)

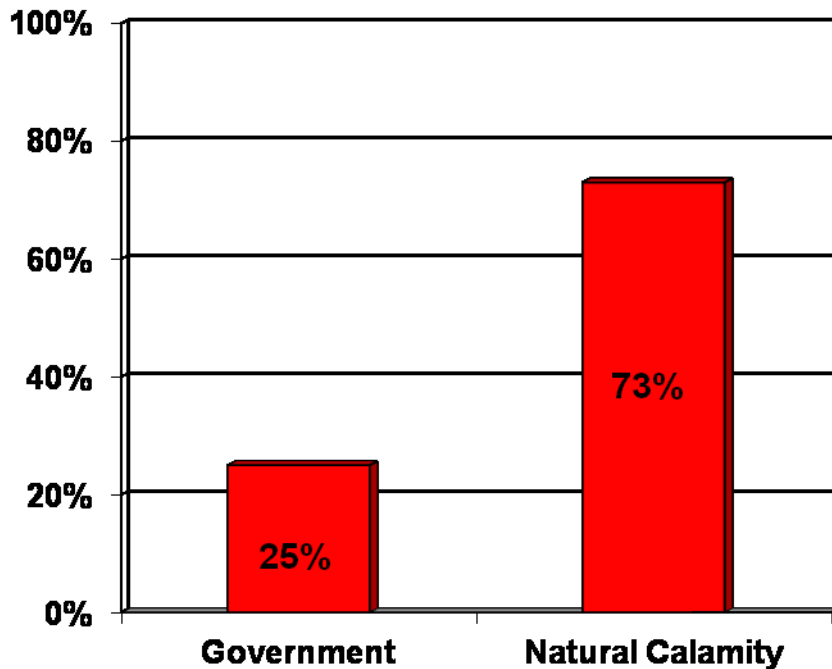
How often do you fear for your own personal safety or security or for that of your family these days (2008)?



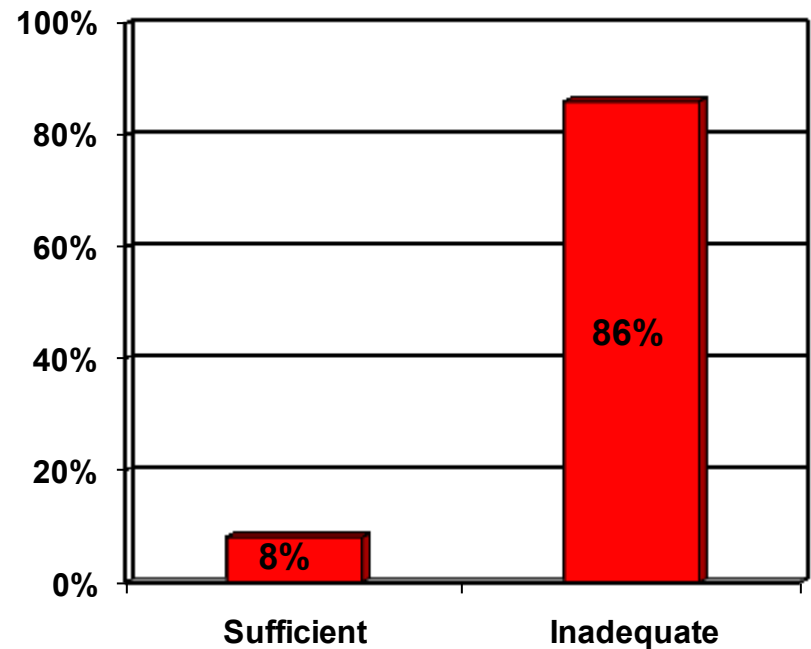
Charney Research

Pakistanis don't blame government for flood damage but most are disappointed with its response.

Responsibility for flood damage lies with ... (Sep 10)



Steps taken by government to help flood victims are ... (Sep 10)



Pakistanis are hostile to Western cultural and political influences, but favor closer economic ties.

	Agree	Disagree
Foreign movies, TV, and music are good.	14%	64%
Muslims should reject western political ideas.	60%	25%
Greater foreign trade and commerce	Good: 54%	Bad: 15%
Economic connections with developed West	Closer: 47%	Reduced: 34%

Since 2008's protests and vote, political efficacy, voice, and participation are up, as is support for non-violent conflict.

	2008	2006
Can influence government decisions: a lot / some	35%	29%
Don't feel like second-class citizens	37%	13%
People feel free to express political opinions	58%	50%
Voted in last general election	64%	52%
Willing to engage: peaceful protest, legal action, public advocacy	77%	51%

Al Qaeda and Taliban lost ground in 2009 but are rebounding and LeT's popularity has grown.

Percent who view each favorably

	2010	2009	2008	2006
Al Qaeda	18	9	18	n/a
Taliban	15	April: 10 Dec: 4	13	23
TTP	18	n/a	n/a	n/a
Lashkar-e Taiba	25	43	16	19

A large minority of Pakistanis still supports extremist ideology, though opposition has risen.

Percent who agree/disagree with each statement

	2008	2006
Muslims humiliated/oppresed in our country	43/48 (Disagree: +17)	46/31
America waging war on Islam	65/18 (Disagree: +8)	63/10
Good Al Qaeda attacked US, West	30/38 (Disagree: +18)	32/20

Since Swat, Pakistanis favor fighting extremists and support PM Gilani, but not Zardari or the US.

	June '08	July '09	Dec '09
Taliban, Al Qaeda are a serious problem	45%	86%	93%
Pakistan Army should fight extremists	27%	69%	74%
Gilani gov't performance good/very good	29%**	62%	45%
Zardari job performance: approve	19%**	25%	18%
Favorability: the United States	19%	16%	17%^
Favorability: Barack Obama	8%*	13%*	13%

IRI Polls, *CR Poll Oct '08, Pew Poll Apr'09,
 ** IRI Jun '08, Jul '09, Dec '09, ^Gallup Poll Apr '10

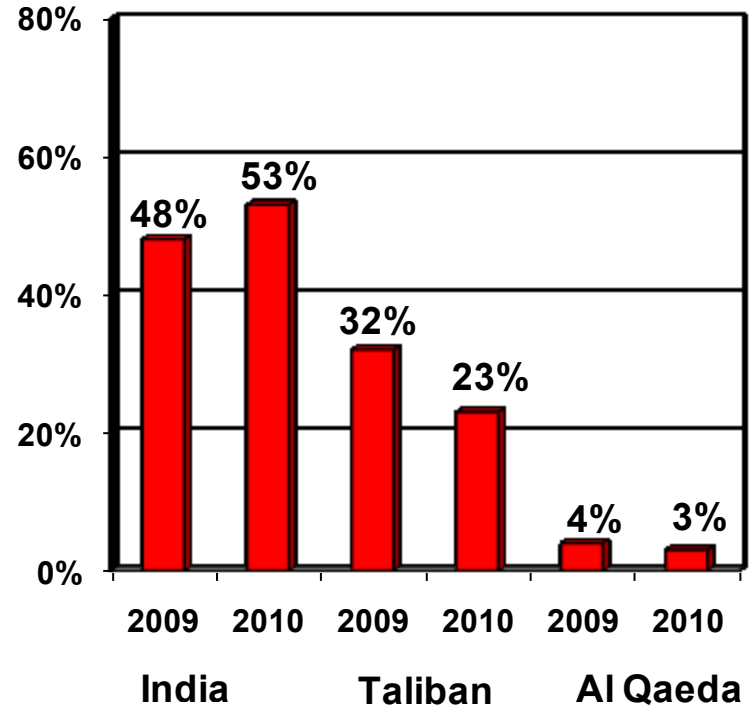
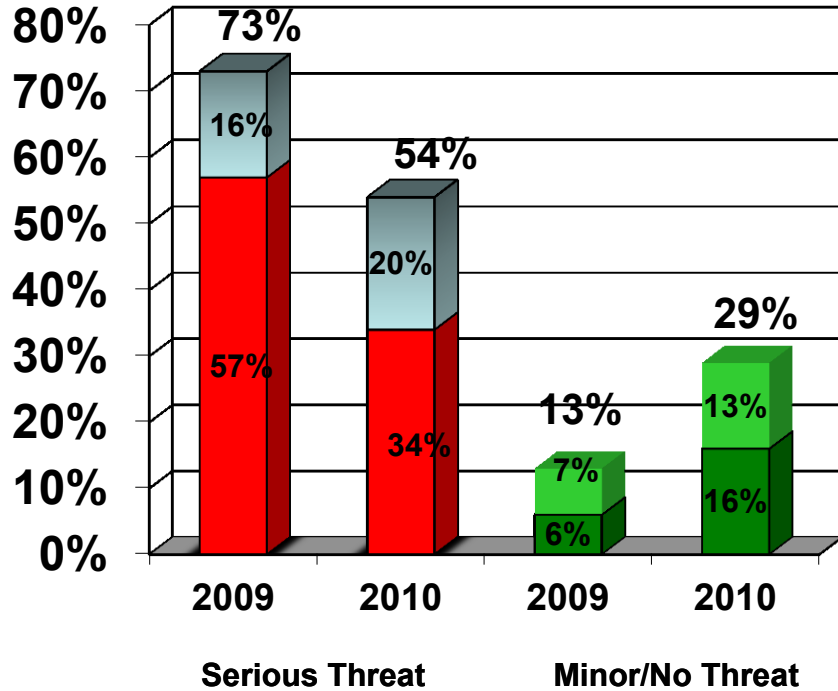
The Swat conflict moved opinion in favor of US aid to fight extremists but the numbers slipped by late 2009.

	July '09	Dec '09
US financial/humanitarian support where extremists operate	72%	53%
US provides intelligence support where extremists operate	63%	48%
US missile strikes against leaders of extremist groups with Pakistani consultation	47%	53%
Cooperate with US in WOT	24%	19%**

The Taliban are now seen as less of a threat than last year, and India is still perceived as a greater one.

How serious of a threat is the Taliban to Pakistan?

Of all these threats I have named [the Taliban, India, al Qaeda], which of these is the greatest threat to our country?

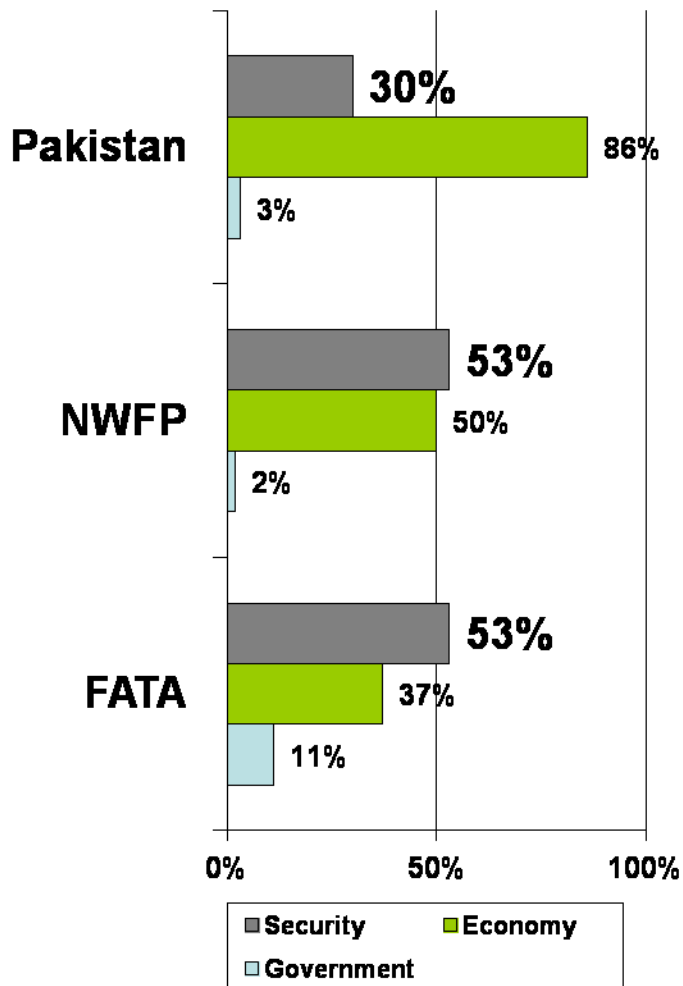


Very Somewhat No Threat at all Minor

Charney Research

Security is the primary issue in FATA, more than in the rest of Pakistan.

*Biggest National Problems
(Cited by 10% or more)*



*Biggest Local Problems
(Cited by 10% or more)*

	Elec- tricit y %	Secu- -rity %	Eco- no- my %	Water %	Gas %
Pakistan	25	1	24	23	15
NWFP	28	3	34	23	26
FATA	33	30	30	26	0

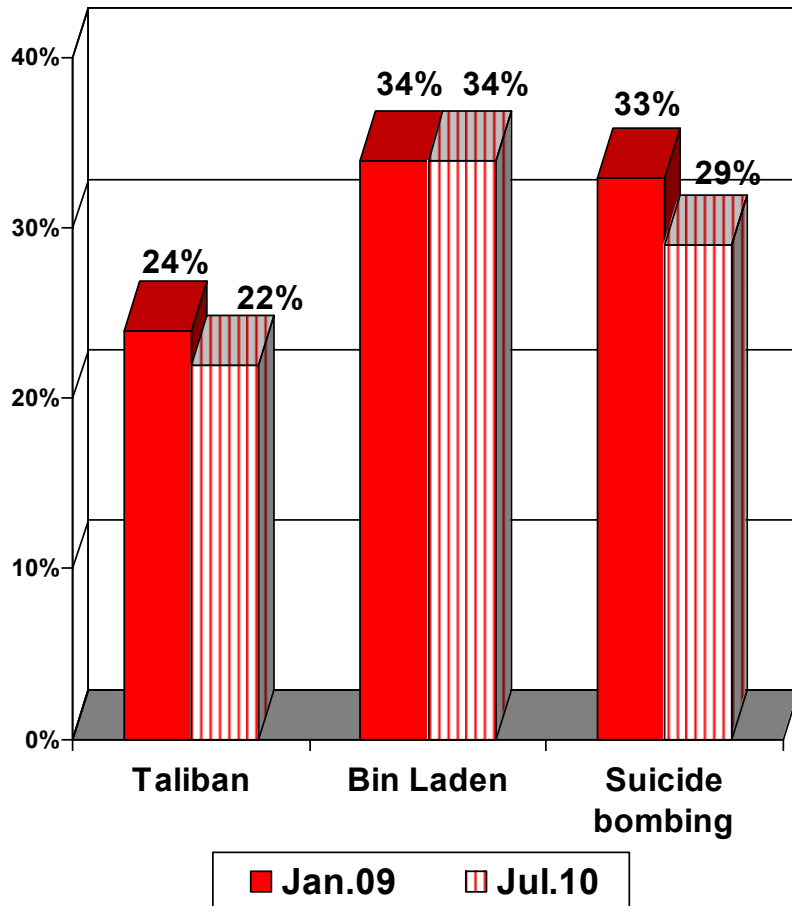
Government institutions in FATA are weak and lack public confidence, except for the Army.

	Presence Strong	Confidence	Favorability
Administrative System/Political Agent	32%	21%	n/a
Khassadars, Levies, Scouts	29%	20%	33%
Frontier Corps	33%	28%	41%
Pakistan Army	n/a	n/a	64%

Extremist support has held up in FATA, though moderates remain in the majority.

Percent Favorable

Percent of Voting Intentions



	Jan 2009	July 2010
PPP	27	9
PTI	12	28
JUI-F/JI	14	13
ANP	7	8
PML-N	3	10
MQM	1	3

In FATA, extremist support varies sharply by agency, the flipside of discontent with government and security forces.

	Mohmand %	Orakzai %	Kurram %	Khyber %	Bajaur %	North Waziristan %	South Waziristan %
<u>Government Performance:</u>							
• Pak gov't job performance: Poor/Fair	27	29	43	64	80	98	24 (DK: 76)
• PA: No confidence	8	11	60	78	64	100	48
<u>Security Forces:</u>							
• Local Police: No confidence	30	17	66	74	74	100	30 (DK: 70)
• Frontier Corps: No confidence	26	7	27	38	59	100	5 (DK:93)
<u>Extremism:</u>							
• Taliban: Favorable	0	1	20	8	42	94	1 (DK: 90)
• Lashkar-e-Taiba: Favorable	4	7	19	7	34	67	3 (DK:90)
<u>Biggest Local Problems:</u>	Electricity Roads	Water Electricity	Electricity Water	Economy Electricity	Security Economy	Security Economy	Security Economy

Fata residents remain very cool to the US govt and military but open to US development aid

	Jan 09	Jul 10
Favorability: Barack Obama	18%	11%
Favorability: US military	9%	12%
Support US-led War on Terror	17%	22%
Support US drone strikes	n/a	22%
Support US military hot pursuit	n/a	6%

US aid for ...	Improve opinion of US
Scholarships to America	74%
Education in FATA	70%
Health Care in FATA	66%
Business investment in FATA	59%
Pakistan military	58%

Pakistan: Strategic Take-Aways

- **Pakistan's crisis is governance, even more than extremism, and both are most severe in FATA and the Southern Punjab. Extremism is down but rebounding – discontent with governance remains high. The floods may exacerbate this but will not change it.**
- **More participation and a new sense of people power are positives. Gilani's government gained support, then lost some, while Pres. Zardari's ratings remain weak.**
- **There is a strong public reaction against violence, which hurt the extremists, and Pakistanis are more willing to confront extremists. Pakistanis are becoming somewhat complacent about the extremist threat, less willing to work with the US, and still obsessed by the "Indian threat."**
- **Pakistanis remain anti America and Western culture and politics.**
- **Their openness to economic ties and international economic and counter-terror cooperation offers opportunities.**

Pakistan: Strategic Opportunities

- **Obama as President has not changed things much –changing perceptions requires not just new ways to speak to Pakistan but deeds to match.**
- **Central message (and action) should be our desire to make Pakistan part of the developing Western world. Using it, dropping it, is over.**
- **Credibility means real, major efforts to meet key economic and development needs and Pakistan’s regional and global economic integration.**
- **US response to the flood needs to be visible and effective.**
- **FATA development initiatives should be pursued and expanded.**
- **We should explore how turn support for our activities into favorable opinion.**
- **We can’t make Pakistanis want to confront terror – only their leaders can. We should help them take responsibility, in their national interest.**
 - **Now: We cannot treat Pakistan as part of the problem, it has to be a part of the solution**
 - **Short term: Mutually supportive posture re Afghanistan & FATA, help Pakistan re-define “strategic depth” and Afghan interests to promote an Afghan settlement, reduce tension with India.**
 - **Long run: Helping them shift from confronting India to counter-terrorism, regional integration and globalization, settlement of outstanding disputes**