IRANPOLL®

Unveiling Iran

TEHRAN FIELD OFFICE
TORONTO GLOBAL OFFICE

State of Iran Survey Series
Dec 2018 wave

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About State of Iran Survey Series

The "State of Iran" survey series is designed to track the trends regarding Iranian people's attitudes towards the foreign policy, nuclear deal, and Iran's state of economy.

All waves of the survey are collected by IranPoll utilizing its standard nationally probabilistic method as detailed in this document. Waves of Apr and Dec 2018 are exclusive to IranPoll. Other waves were collected for the University of Maryland Center for International and Security Studies (CISSM). CISSM was responsible for designing the questionnaires, getting feedback on them from relevant policy experts and practitioners, performing the analysis, and putting together the final reports which are available publicly on CISSM website.

Survey questions in Dec 2018 wave are - approximately - 24% on Economy, 28% on International Relations, 28% on Nuclear issues, and 20% on Security as summarized in the table below:

#	Question Subject	Topic
1	General economic condition	Economy
2	Getting better or getting worse	Economy
3	Greatest negative impact on the Iranian economy	Economy
4	Importance of nuclear program	Nuclear
5	JCPOA	Nuclear
6	JCPOA	Nuclear
7	JCPOA	Nuclear
8	JCPOA	Nuclear
9	JCPOA	Nuclear
10	European countries invest	Economy
11	European countries invest	Economy
12	JCPOA	Nuclear
13	Develop Missiles	Security
14	Develop Missiles	Security
15	ISIS	Security
16	Asad	Security
17	China	Intl. Relations
18	Russia	Intl. Relations
19	Germany	Intl. Relations
20	France	Intl. Relations
21	UK	Intl. Relations
22	UN	Intl. Relations
23	US	Intl. Relations
24	Conflict vs. Common Ground	Security
25	Self-sufficiency vs trade	Economy

About IranPoll®

IranPoll is an independent full-service opinion research firm focusing exclusively on Iran. A division of People Analytics Inc., IranPoll relies on its vast survey capacity to conduct and collect polling data from Iran using various modes of data collection including face to face, telephone polling (including a monthly Omnibus), in-depth interviews, focus groups, and online panel (B2B and 51k-member B2C).

IranPoll operates multiple call centers with a total of 87 active calling stations conducting over **160,000** probabilistic interviews per year in Iran. Building on the in-depth local knowledge of its team of experts, IranPoll solely relies on methods that could be objectively verified and independently replicated.

Being authorized by the United States Department of the Treasury Office of Foreign Assets Control (OFAC) to "to engage in all transactions necessary to facilitate and pay for" opinion research, IranPoll has been using its extensive research capabilities to provide opinion research services to a wide range of clients including Princeton University, Cornell University, University of Maryland, UCLA, Rice University, Ohio State University, BBC, euronews, Gallup, IPSOS, GfK, Kantar, Lightspeed, Qualtrics, YouGov, Harris Poll...

Complementing its extensive field capacity, People Analytics Inc. is the developer of VoxSurvey, which is an online governed data sharing and visualization platform. It allows polling data owners to provide governed data access to users with defining access-level configuration per data point. The database currently contains more than 3,000 questions on 430 topics and subtopics from more than 300 probability sample surveys conducted from 2006 to 2019.

IranPoll is a member of ESOMAR, American Association for Public Opinion Research (AAPOR), MRIA, and WAPOR and follows their industry standards.

One of IranPoll's Call Centers

Methodology and Sampling Steps

Data presented in this survey were collected through telephone interviews of 1,017 Iranians during December 4 - 12, 2018. The sampling margin of error was +/- 3.1%.

Our sampling methodology for CATI uses a nationally representative probability sampling method which is both simple and robust:

> # The Washington Post
>
> *"methodology stands up to scrutiny."*
>
> *Referring to a poll conducted by IranPoll for University of Maryland.*
>
> — *The Washington Post, Feb 4, 2016*

1. The sample is allocated to all 31 Iranian provinces in accordance to their population size.
2. All settlements within each province are categorized into seven population groups, one group for all rural settlements and six groups for urban settlements.
3. The sample allocated to each province is distributed among each of the seven population groups relative to each group's population size relative to the population of that province.
4. One settlement within each of the seven groups is randomly selected and the interviews allocated to that group are conducted in the randomly selected settlement.
5. After fixing the list of area codes and telephone exchanges for landline telephones in each of the randomly selected settlements, Random Digit Dialing (RDD) is used to reach random households.
6. When a residence is reached, a qualified respondent is randomly selected from within that household, often using the random table technique.
7. An initial attempt and at least two callbacks are made in an effort to complete an interview with the randomly selected respondents.
8. All of the interviews are conducted in a centralized call centers, all interviewers are continuously monitored, and all interactions are recorded for quality control purposes.

More about our sampling methodology is available here: https://www.iranpoll.com/method

> *It's not easy conducting opinion polls in Iran. But IranPoll has a good track record by using anonymous phone surveys. It has accurately predicted presidential election result.*
>
> — *Erlich, R. (2018). Iran Agenda (1st ed., pp. 129). Abingdon: Routledge.*

Call Center Languages

IranPoll is unique in that unlike most other fielding agents who only use interviewers fluent in Farsi (Persian), which is the native language of only about 55% of Iran's current population, it uses interviewers fluent in the vernaculars of various regions in Iran. This allows IranPoll to more effectively communicate survey questions and accurately record obtained responses.

Our call centers are staffed with interviewers' native in the following ethnic languages and dialects of Iran:

o Persian/Farsi   o Luri
o Azerbaijani   o Arabic
o Gilaki   o Balochi
o Mazandarani   o Turkmen
o Kurdish   o Tat

Phone Coverage in Iran

Phone survey is a strong mode of data collection in Iran, as the response rate IranPoll obtains is very high (around 86%) and the phone penetration in Iran is almost universal.

Based on the 2013 report by "Statistical Centre of Iran", about 98% of Iranians households (22.3 million) had access to telephone (fixed or mobile cellular telephone or both) at home. These shares were 99% for urban and 94% for rural households. 5% had a fixed telephone only, 1.5% were with a mobile telephone only, and 91% enjoyed both fixed and a mobile telephone.

	Total	Urban	Rural
Households with a telephone	98%	99%	94%
• Fixed telephone only	5%	5%	6%
• Mobile cellular telephone only	2%	1%	3%
• Both fixed and mobile telephone	91%	94%	84%
Households with a computer	46%	54%	23%

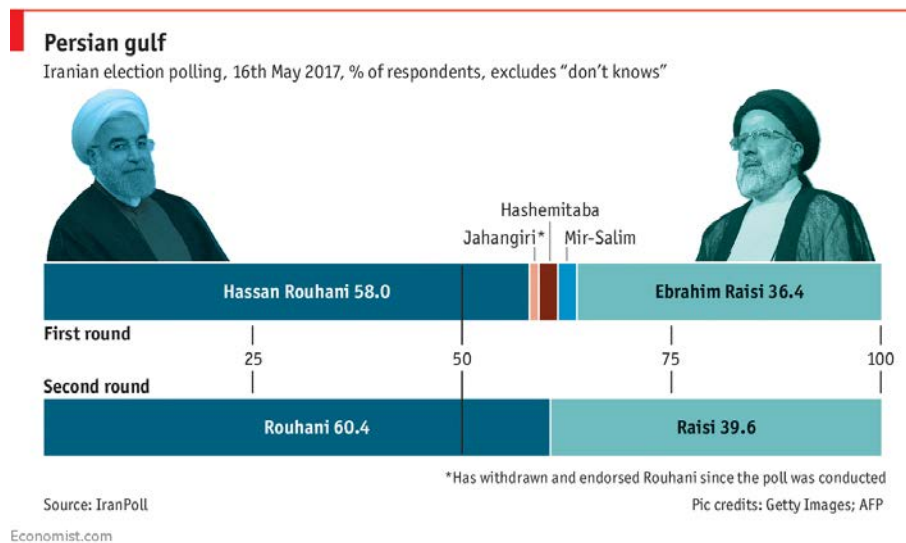*IranPoll.com - Source: Statistical Centre of Iran, 2013*

IranPoll's CATI, Proven to be Predictive

IranPoll is proud of providing a fully accurate prediction of the outcome of Iran's May 2017 presidential election.

Our prediction from May 16, 2017 (3 days before the election), was published by The Economist about 20 hours before the initial official results were declared. (accessible here: https://www.economist.com/blogs/graphicdetail/2017/05/daily-chart-14)

On May 20, 2017, Iran's Ministry of Interior officially declared that Rouhani had won 57% and Raisi had won 38% of the cast ballots. As shown in this image from The Economist, our prediction was less than 2 percentage points away from the officially declared results.

Please find more about our election polls here.

Persian gulf

Iranian election polling, 16th May 2017, % of respondents, excludes "don't knows"

Hashemitaba
Jahangiri*| Mir-Salim

| Hassan Rouhani 58.0 | | Ebrahim Raisi 36.4 |

First round
25   50   75   100

Second round

| Rouhani 60.4 | Raisi 39.6 |

*Has withdrawn and endorsed Rouhani since the poll was conducted

Source: IranPoll

Pic credits: Getty Images; AFP

Economist.com

The Washington Post

"IranPoll series has become one of the best snapshots of public opinion in Iran over recent years, with its polling predictions for the May 2017 presidential elections accurate within less than 2 percentage points."

— The Washington Post, Feb 2, 2018

State of Iran Dec 2018 Wave, Questions and Results

Dates of Survey: December 4 - 12, 2018
Sample Size: 1,017 - Margin of Error: +/- 3.1

Q1. In your opinion, how good or bad is our country's general economic situation? Is it:

	May 2015	Jan. 2016	Feb. 2016	Mar. 2016	June 2016	Dec. 2016	May 2017	Jun. 2017	Jan. 2018	Apr. 2018	Dec. 2018
Very good	11.1	8.4	7.9	5.3	3.8	3.3	3.4	2.5	2.5	24	1.9
Somewhat good	43.2	40.9	41.1	40.3	35.7	31.7	29.8	33.1	27.6		26.8
Somewhat bad	22.5	24.2	25.2	26.3	29.4	30.3	28.4	29.5	28.2	72	27.9
Very bad	21.2	24.4	23.5	25.7	29.2	33.2	36.6	33.9	40.7		42.9
DK/NA [vol.]	2.0	2.1	2.3	2.5	2.0	1.5	1.9	1.1	.9	4	.4

Q2. Right now, do you think economic conditions in Iran, as a whole, are getting better or getting worse?

	May 2015	Aug. 2015	Jan. 2016	Mar. 2016	June 2016	Dec. 2016	May 2017	Jun. 2017	Jan. 2018	Apr. 2018	Dec. 2018
Getting better	49.3	57.4	47.4	52.4	42.2	41.5	40.2	39.1	31.3	27	33.2
Getting worse	37.1	28.5	41.0	33.3	43.4	51.3	52.4	50.2	58.4	64	59.5
Staying the same [vol.]	9.7	8.7	6.1	8.3	9.2	3.5	4.1	7.7	6.2	5	4.1
DK/NA [vol.]	4.0	5.4	5.4	6.0	5.2	3.7	3.3	3.0	4.1	4	3.2

Q3. Which of the following do you think has the greatest negative impact on the Iranian economy?

	May 2015	January 2018	Dec. 2018
Foreign sanctions and pressures	26.3	32.1	36.2
Domestic economic mismanagement and corruption	64.3	63.3	59.1
DK/NA [vol.]	9.4	4.6	4.8

Q4. In your opinion, how important is it for our country to develop its nuclear program? Is it:

	Oct. 2014	Aug. 2015	Jan. 2016	Jun. 2016	Dec. 2016	May 2017	Jan. 2018	Dec. 2018
Very important	84	84.6	82.2	80.6	80.0	79.2	75.3	78.6
Somewhat important	7	8.6	10.6	9.5	12.6	11.6	10.5	11.2
Not very important	3	2.8	3.0	4.2	2.5	2.7	5.1	3.7
Not important at all	2	1.8	2.4	2.3	1.7	2.7	4.5	2.6
DK/NA [vol.]	4	2.2	1.9	3.4	3.2	3.8	4.6	3.9

Q5. As you may know, in July 2015, Iran and the P5+1 countries reached a comprehensive agreement in regard to Iran's nuclear program, which is also known as the JCPOA. In general and based on what you know about the JCPOA, to what degree do you approve or disapprove of this agreement? Do you:

	Aug 2015	Jan. 2016	Mar 2016	June 2016	Dec. 2016	May 2017	June 2017	Jan. 2018	Apr. 2018	Dec. 2018
Strongly approve	42.7	30.4	26.5	22.3	21.3	22.5	30.7	26.0	19.1	22.8
Somewhat approve	32.8	41.4	45.0	40.3	34.1	36.7	36.4	29.1	32.9	28.3
Somewhat disapprove	13.9	13.2	13.3	16.5	20.4	19.3	15.9	21.7	22.3	22.9
Strongly disapprove	6.7	8.3	8.0	8.0	13.2	13.0	11.6	12.1	13.5	16.4
DK/NA [vol.]	3.9	6.6	7.3	12.8	11.0	8.5	5.5	11.1	12.2	9.6

Q6. As a result of the JCPOA, at this point would you say people's living conditions have or have not improved? [If improved ask: a lot, somewhat, or only a little]

	June 2016	Dec. 2016	May 2017	June 2017	January 2018	Apr. 2018	Dec. 2018
Improved a lot	1.5	1.5	2.9	4.1	2.5		3.1
Improved somewhat	9.9	10.5	11.3	15.1	13.3	17	8.3
Improved only a little	13.2	10.1	7.4	7.4	4.5		5.7
Have not improved	73.7	72.6	74.4	70.3	74.8	79	81.2
DK/NA [vol.]	1.7	5.3	4.0	3.1	5.0	4	1.7

Q7. As a result of the nuclear agreement, in general do you think that Iran's relations with the United States have or have not improved? [If improved ask: a lot, somewhat, or a little]

	June 2016	Dec. 2016	May 2017	Jan. 2018	Dec. 2018
Improved a lot	2.3	1.9	2.9	.5	.2
Improved somewhat	17.2	16.1	14.8	2.7	1.7
Improved a little	9.3	9.7	8.1	2.3	2.1
Have not improved	55.7	56.6	57.4	82.7	87.3
Have worsened [vol.]	10.2	9.5	10.3	7.5	8.1
DK/NA [vol.]	5.3	6.2	6.5	4.3	.6

Q8. As a result of the nuclear agreement, in general do you think that Iran's relations with European countries have or have not improved? [If improved ask: a lot, somewhat, or a little]

	Jan. 2016	June 2016	Dec. 2016	Jan. 2018	Dec. 2018
Improved a lot	16.4	9.3	9.8	6.3	3.8
Improved somewhat	49.8	47.8	43.9	38.5	31.9
Improved a little	11.3	11.6	13.8	10.7	13.4
Have not improved	15.1	25.6	22.5	34.6	38.2
Have worsened [vol.]	1.4	.6	3.7	1.3	3.2
DK/NA [vol.]	6.0	5.1	6.3	8.6	9.5

Q9. How confident are you that European countries[1] will live up to their obligations toward the nuclear agreement? Are you:

	June 2016	Dec. 2016	May 2017	Jan. 2018	Apr. 2018	Dec. 2018
Very confident	5.8	3.2	5.9	6.5	54	7.2
Somewhat confident	55.0	48.2	47.5	53.5		36.7
Not very confident	21.4	27.2	24.0	22.6	42	28.0
Not confident at all	13.5	16.0	16.7	13.4		19.7
DK/NA [vol.]	4.4	5.4	5.9	4.1	4	8.4

Q10. Are European countries moving as rapidly as they can to trade and invest with Iran now that some sanctions have been lifted, or are they moving slower than they could?

	Dec. 2016	May 2017	Jan. 2018	Apr. 2018	Dec. 2018
They are moving as rapid as they can	19.2	17.8	16.8	13	11.8
They are moving slower than they could	70.3	71.3	73.0	78	81.2
None of the above/ other [vol.]	1.1	1.0	1.4	1	.8
DK/NA [vol.]	9.4	9.9	8.9	8	6.2

[Q11 asked only of those who said the Europeans are moving slower than they could in Q10]
Q11. In your opinion, are European countries moving slower than they could to trade and invest with Iran mostly because of:

	Dec. 2016	May 2017	Jan. 2018	Dec. 2018
Iran's own weak business environment	18.6	19.3	13.4	11.5
Pressure or fear of the United States	78.7	75.3	83.4	85.2
None of the above/ other [vol.]	.9	2.1	1.5	1.4
DK/NA [vol.]	1.8	3.3	1.6	1.9

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[1] Previous waves asked about other P5+1 countries besides the United States.

Q12. Thinking about how the JCPOA has worked out so far, which view is closer to yours?

	January 2018	Dec. 2018
The JCPOA experience shows that it is worthwhile for Iran to make concessions when negotiating with world powers because through compromise Iran can negotiate mutually beneficial agreements with world powers.	21.9	22.3
The JCPOA experience shows that it is not worthwhile for Iran to make concessions when negotiating with world powers, because Iran cannot have confidence that if it makes a concession world powers will honor their side of an agreement.	67.4	72.4
It is too early to tell [vol.]	.1	1.1
Other/Depends [vol.]	1.1	1.2
DK/NA [vol.]	9.6	2.9

Q13. In your opinion, how important is it for our country to develop missiles? Is it:

	January 2018	Dec. 2018
Very important	73.8	76.3
Somewhat important	21.1	19.5
Not very important	1.7	1.5
Not important at all	2.3	1.8
DK/NA [vol.]	1.2	.9

[Only asked from those who say it is "important" for Iran to develop missiles in Q13]
Q14. Why do you think it is important for our country to develop missiles? [Open-ended]

	January 2018	Dec. 2018
To maintain/increase Iran's security	14.8	15.1
To increase Iran's power	3.9	1.1
To increase Iran's defense and military capabilities	8.4	5.2
To defend Iran against its enemies	32.7	36.2
To defend Iran in case of a war	9.7	10.7
To deter others from attacking Iran	16.3	18.3
To not fall behind other countries	3.2	2.3
To counter threats from US/Israel	6.9	7.8
Other	.4	.6
DK/NA	3.6	2.6

Q15. In your opinion should Iran increase its support of groups fighting terrorist groups like ISIS, decrease it, or maintain it at the current level?

	Mar. 2016	Jun. 2016	Dec. 2016	Jun. 2017	Jan. 2018	Dec. 2018
Increase it	62.8	59.8	56.2	67.9	54.8	57.2
Decrease it	13.1	8.1	9.7	6.8	10.2	9.1
Maintain it at the current level	19.5	29.7	29.0	22.7	31.7	29.4
Other/Depends [vol.]	.5	.2	.6	.9	1.0	1.8
DK/NA [vol.]	4.1	2.2	4.5	1.7	2.3	2.5

Q16. Some people say that going forward, Bashar Assad should not be allowed to remain President of Syria because he is an incompetent leader who used excessive force against Syrian civilians and let ISIS gain control of territory. Others say that Bashar Assad did what was necessary to keep Syria together and whether he remains the president of Syria should be decided by the Syrian people. Which view is closer to your perspective?

	January 2018	Dec. 2018
Bashar Assad should not be allowed to remain President of Syria	9.2	8.9
Syrian people should decide whether Bashar Assad remains as President of Syria	84.0	83.6
DK/NA [vol.]	6.8	7.5

Q. Now I am going to read to you names of some countries and organizations. Please indicate to what degree you have a favorable or an unfavorable view of each?

Q17. China

	July 2014	May 2015	August 2015	Jan. 2016	June 2016	Dec. 2016	Jan. 2018	Dec. 2018
Very favorable	13	9.4	14.2	8.4	10.1	10.4	14.7	15.9
Somewhat favorable	38	38.9	38.9	45.8	48.1	45.2	39.3	40.3
Somewhat unfavorable	21	16.7	18.9	17.8	16.3	17.4	14.6	14.1
Very unfavorable	25	31.0	21.8	22.8	23.1	22.6	28.8	26.7
DK/NA [vol.]	3	3.9	6.2	5.1	2.4	4.4	2.6	3.1

Q18. Russia

	July 2014	May 2015	August 2015	Jan. 2016	June 2016	Dec. 2016	Jan. 2018	Dec. 2018
Very favorable	14	10.3	13.3	15.3	14.2	16.8	18.6	22.0
Somewhat favorable	37	33.0	38.8	42.0	39.7	38.8	39.9	41.8
Somewhat unfavorable	21	21.1	17.2	15.7	17.4	16.5	15.9	14.9
Very unfavorable	26	32.2	26.6	23.1	25.5	23.3	22.5	19.6
DK/NA [vol.]	3	3.4	4.1	3.9	3.2	4.6	3.2	1.7

Q19. Germany

	July 2014	May 2015	August 2015	Jan. 2016	June 2016	Dec. 2016	Jan. 2018	Dec. 2018
Very favorable	13	13.6	17.0	17.6	18.3	18.8	22.5	22.4
Somewhat favorable	31	34.6	36.4	36.6	38.9	33.2	39.2	33.7
Somewhat unfavorable	25	21.1	17.0	18.7	17.6	17.6	14.6	17.5
Very unfavorable	28	27.1	22.6	20.8	22.2	24.5	20.7	23.1
DK/NA [vol.]	3	3.7	7.0	6.3	3.0	5.9	3.1	3.2

Q20. France

	July 2014	May 2015	August 2015	Jan. 2016	June 2016	Dec. 2016	Jan. 2018	Dec. 2018
Very favorable	7	10.1	13.4	10.5	11.4	10.8	18.6	16.1
Somewhat favorable	30	30.9	31.8	33.2	33.3	30.6	37.0	30.4
Somewhat unfavorable	26	20.4	19.6	21.5	21.0	22.9	20.3	22.6
Very unfavorable	33	35.0	29.4	29.0	31.2	30.7	20.6	25.2
DK/NA [vol.]	4	3.6	5.8	5.8	3.2	5.0	3.6	5.7

Q21. United Kingdom

	July 2014	May 2015	August 2015	Jan. 2016	June 2016	Dec. 2016	Jan. 2018	Dec. 2018
Very favorable	6	5.6	7.1	5.2	6.2	6.2	9.4	7.9
Somewhat favorable	18	22.6	22.5	20.7	19.7	16.9	21.0	17.1
Somewhat unfavorable	22	15.9	18.1	18.7	20.5	21.2	22.6	25.8
Very unfavorable	52	53.0	47.0	51.6	51.1	51.4	44.4	48.1
DK/NA [vol.]	3	2.9	5.3	3.9	2.6	4.3	2.7	1.1

Q22. The United Nations

	June 2016	Dec. 2016	Jan. 2018	Dec. 2018
Very favorable	12.1	10.4	9.9	8.6
Somewhat favorable	35.0	35.0	41.9	32.4
Somewhat unfavorable	19.4	19.7	19.3	23.1
Very unfavorable	28.3	27.1	23.2	31.7
DK/NA [vol.]	5.3	7.8	5.8	4.2

Q23. The United States

	July 2014	May 2015	August 2015	Jan. 2016	June 2016	Dec. 2016	Jan. 2018	Dec. 2018
Very favorable	9	7.9	8.6	7.8	5.5	4.7	3.4	3.5
Somewhat favorable	19	20.4	22.6	20.5	21.1	18.0	15.0	11.7
Somewhat unfavorable	13	16.9	14.3	16.5	14.2	15.8	12.9	9.2
Very unfavorable	58	53.2	52.3	54.2	58.7	59.8	66.9	72.2
DK/NA [vol.]	2	1.5	2.2	1.0	.6	1.7	1.9	3.4

Q24. Which position is closer to yours?
1. Islamic and Western religious and social traditions are incompatible with each other and conflict between the two is inevitable; or
2. Most people in the West and the Islamic world have similar needs and wants, so it is possible to find common ground for peaceful coexistence?

	July 2014	May 2015	Aug. 2015	Jan. 2016	Jun. 2016	Dec. 2016	Jan. 2018	Dec. 2018
Conflict is inevitable	30	35.0	30.1	29.2	29.6	28.5	35.2	29.5
Common ground possible	58	54.5	58.9	58.2	58.9	61.0	58.1	61.3
DK/NA [vol.]	13	10.5	11.0	12.5	11.5	10.5	6.7	9.1

Q25. Now assume that our country could only adopt one of these policies. In your opinion is it better for Iran to:

	July 2014	Feb. 2016	Mar. 2016	May 2017	June 2017	Jan. 2018	Dec. 2018
Strive to achieve economic self-sufficiency	53	57.3	58.4	63.1	65.1	67.3	69.0
Strive to increase its trade with other countries	43	39.1	36.4	33.7	33.3	29.4	27.9
DK/NA [vol.]	4	3.6	5.2	3.3	1.6	3.3	3.1

IranPoll's Databank of Iranian Surveys

Complementing its extensive field capacity, IranPoll is the developer the single most comprehensive databank of Iranian opinion polls containing more than 3,000+ diverse questions on over 430 topics and subtopics from 250+ probability sample surveys conducted from 2006 to 2018 in Iran.

Through its exclusive access to this databank, IranPoll provides its clients with evidence-based consultancy on issues relating to Iran and the Iranian people. This databank enables clients to see where Iranian people stand and how their views and opinions have changed and evolved over the past decade on a comprehensive range of issues.
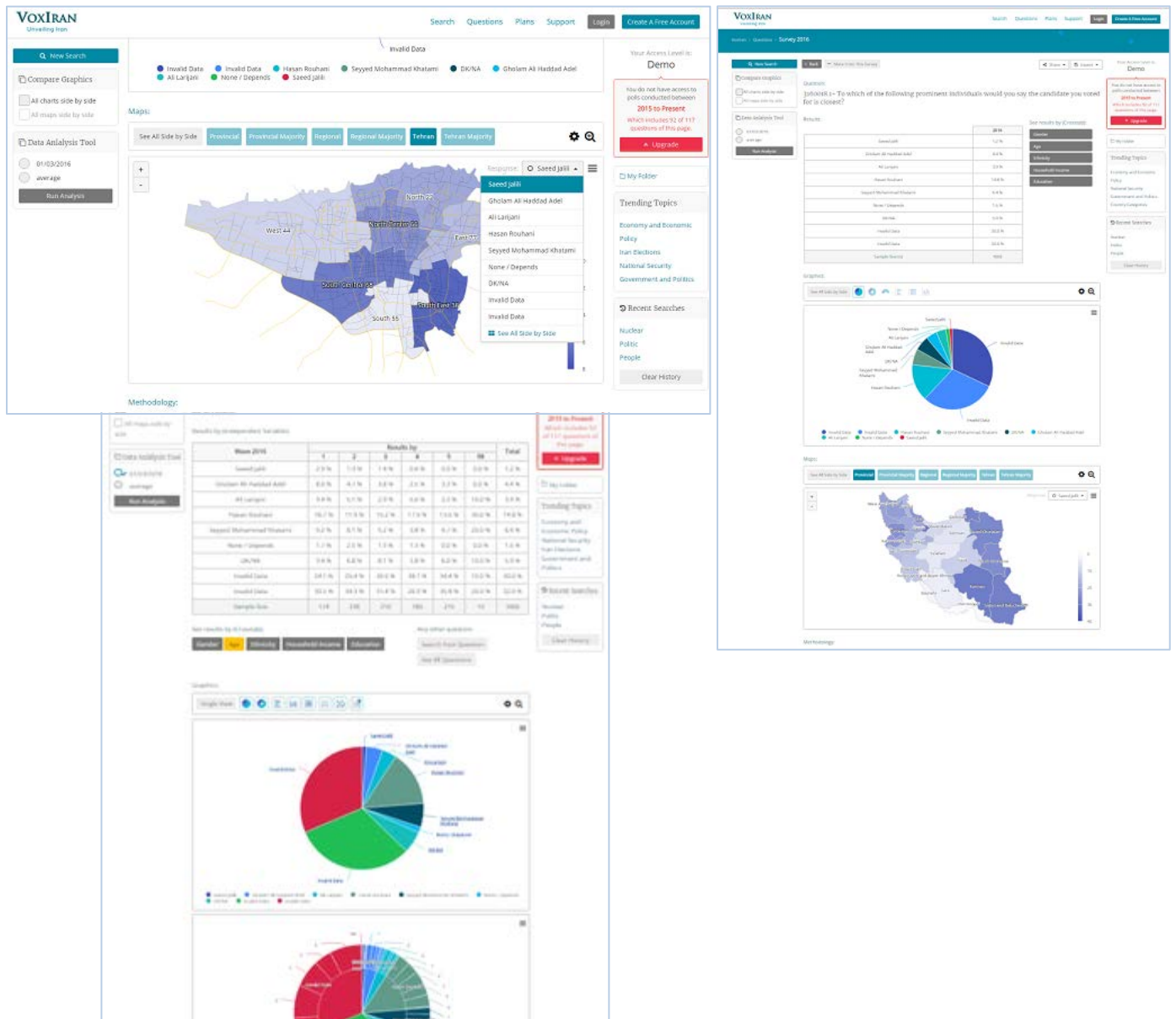
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