

Great Powers, the Gaza War, Pathways for the Kingdom

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A recent set of polls taken in Saudi Arabia reveals notable trends in popular opinion relating to the kingdom's foreign relations, the Israeli-Palestinian conflict, and the role of religion domestically. On the great powers, Saudis are more likely to state that their government should prioritize good relations with China or Russia as opposed to the United States, an undoubted cause for concern. With respect to Israel and the Palestinians, the Gaza war has further hampered already low enthusiasm for Saudi normalization with Israel. Yet while respondents remain invested in a resolution that enshrines Palestinian sovereignty, they express negative views toward both Hamas and the Palestinian Authority. At home, attitudes toward different streams of religious interpretation continue to shift, characterized by growing support for moderate interpretations of Islam, in line with a move away from earlier policies that tolerated extremist rhetoric and ideologies.

Background

For nearly a decade, Saudi-led investments, mediation efforts, and other initiatives directed by Crown Prince Muhammad bin Salman, known as MbS, have highlighted the kingdom's evolving role as a regional leader and global actor. At home, the Vision 2030 program offers the promise of socioeconomic transformation based on a move away from hydrocarbon-based revenue,¹ and change is being driven by a dynamic youth population, with about 70% of Saudis under age thirty-five.

For the United States, which has strong historic

defense ties with Saudi Arabia, the overall relationship remains essential for upholding American interests such as the free flow of trade, counterterrorism, and regional security. A solid rapport will be all the more necessary as the United States lightens its Middle East footprint and relies on regional actors to lead conflict mediation efforts.

In view of Riyadh's prominent regional role and importance in advancing U.S. national security objectives, The Washington Institute has conducted regular polling of Saudi public opinion, with data dating back to 2014. The latest survey, fielded in April/May 2025, measured Saudi attitudes on regional developments and the U.S.-Saudi bilateral relationship.

The nationally representative poll, a multistage probability household survey of one thousand Saudi nationals, was conducted via pen-and-paper personal interviews (PAPI) over the period April 26–May 18, 2025. The response rate was 71%, with a margin of error of 3% at the 95% confidence level. Charts and graphs may not add up to 100% due to rounding. Note also that the survey work preceded the June 2025 war between Iran and Israel. (See Appendix A for a full explanation of methodology for this survey. Appendix B contains survey questions.)



Top-Line Takeaways

Key findings from the April/May 2025 polling are as follows:

Most Saudi citizens do not prioritize the U.S. partnership over others. Despite a historic U.S.-Saudi strategic relationship, only a minority of respondents view it as more important than ties with other major partners. Increasingly, when questioned, Saudis indicate the importance of relations with China and Russia—now at 66% and 57%, respectively—compared with 34% for the United States. Moreover, very few regard U.S. regional policy or successive presidential decisions in a positive light.

Saudi public support for Hamas has diminished significantly since the first months of the Gaza war, and respondents are increasingly supportive of an active Saudi role in brokering Israeli-Palestinian peace. While positive attitudes toward Hamas bumped upward in the aftermath of the October 7 attacks, the April/May 2025 poll suggests that the improvement was partially transient and can be viewed in the context of downward-trending attitudes over the past decade. Broad-based support has likewise emerged for more active Arab involvement in encouraging “moderate positions” from both sides and financing reconstruction efforts in Gaza. Further, most Saudis agree that peace between Israel and a Palestinian state offers the best path forward. Yet the public strongly rejects even temporarily accepting refugees from Gaza.

Saudi support for normalization with Israel is low, but opportunities exist for other forms of cooperation. Whereas some Saudis saw regional promise in the Abraham Accords immediately after deals were announced between Israel and the United Arab Emirates and Bahrain in September 2020, public

interest in normalization with Israel is generally scant and has declined from already-low levels over the war. While attitudes toward allowing business ties are slightly less negative, they too have declined during the war.

Saudi citizens prefer regional cooperation and diplomacy over military strikes to address Iran’s nuclear program. In polling that preceded the twelve-day Iran-Israel war—which included a U.S. strike on the Islamic Republic’s nuclear facilities—a considerable proportion of Saudis expressed an interest in both regional coordination against Iranian threats and security guarantees from global powers should Iran acquire a nuclear weapon. By contrast, fewer agreed that the United States should conduct a direct strike against Iran’s nuclear program.

Developments During Fieldwork

This poll was fielded during a highly active period in the region and in U.S.-Saudi relations. President Donald Trump had announced his intention to visit three Gulf countries shortly before the polling began in mid-April, and his visits to Saudi Arabia, Qatar, and the UAE occurred over May 13–16, just before the polling closed. This snapshot of public opinion also overlaps with these marquee developments: a U.S. ceasefire with the Yemen-based Houthis after a two-month military air campaign, President Trump’s meeting with transitional Syrian President Ahmed al-Sharaa in Riyadh, the initiation of indirect U.S. negotiations with Iran on its nuclear program before the Israeli campaign in June, and the announcement of major U.S.-Saudi investment and defense sales. Any of these items could have affected the Saudi attitudes measured in this poll (see figure 1 for a timeline of regional developments).

Figure 1. Timeline of Relevant Regional Developments



Saudi Relations with the United States and Other Global Powers

According to this most recent poll and trend data, a majority of Saudis do not attach importance to maintaining good relations with the United States, with those in agreement falling from a high of 44% in late 2021 to 41% in autumn 2022 and 35% in 2025.² These attitudes stand in stark contrast to views regarding the kingdom's relations with China and Russia (see figure 2). Today, most Saudis view good relations with China and Russia—but not the United

States—as at least somewhat important, including two-thirds who say this about China.

Between fall 2021 and November/December 2023, an increase likewise occurred—from 49% to 67%—in those who agreed that “we cannot count on the U.S. these days, so we should look more to other nations like Russia or China as partners,” with a 7-point jump between August 2023 and November/December 2023 (see figure 3).

Saudis moreover hold unfavorable views about the Middle East policies of the current and past U.S. administrations alike. Regarding U.S. policies during the two Trump terms, positive attitudes have not moved much, from 20% in 2017 to 19% in 2025.

Figure 2.

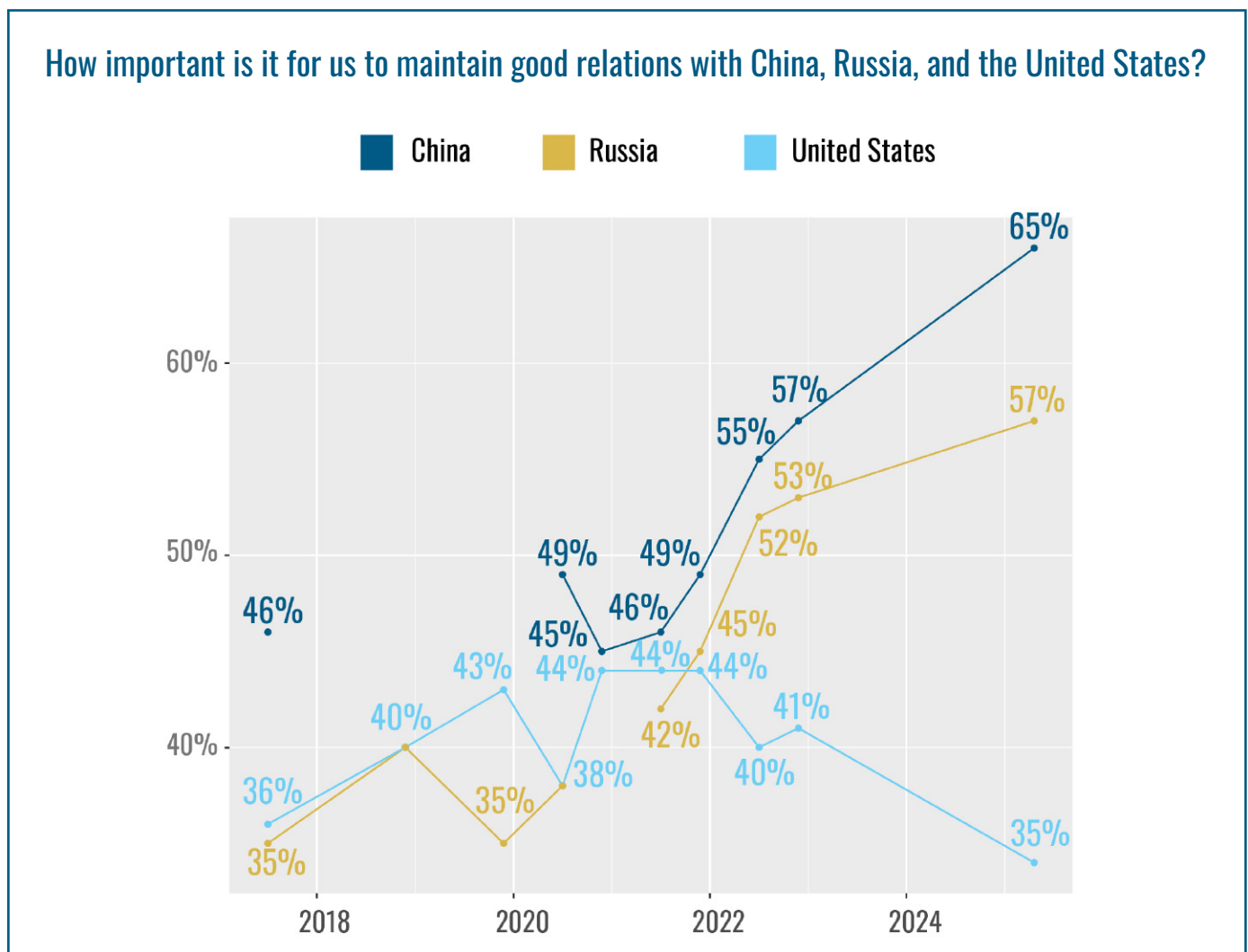
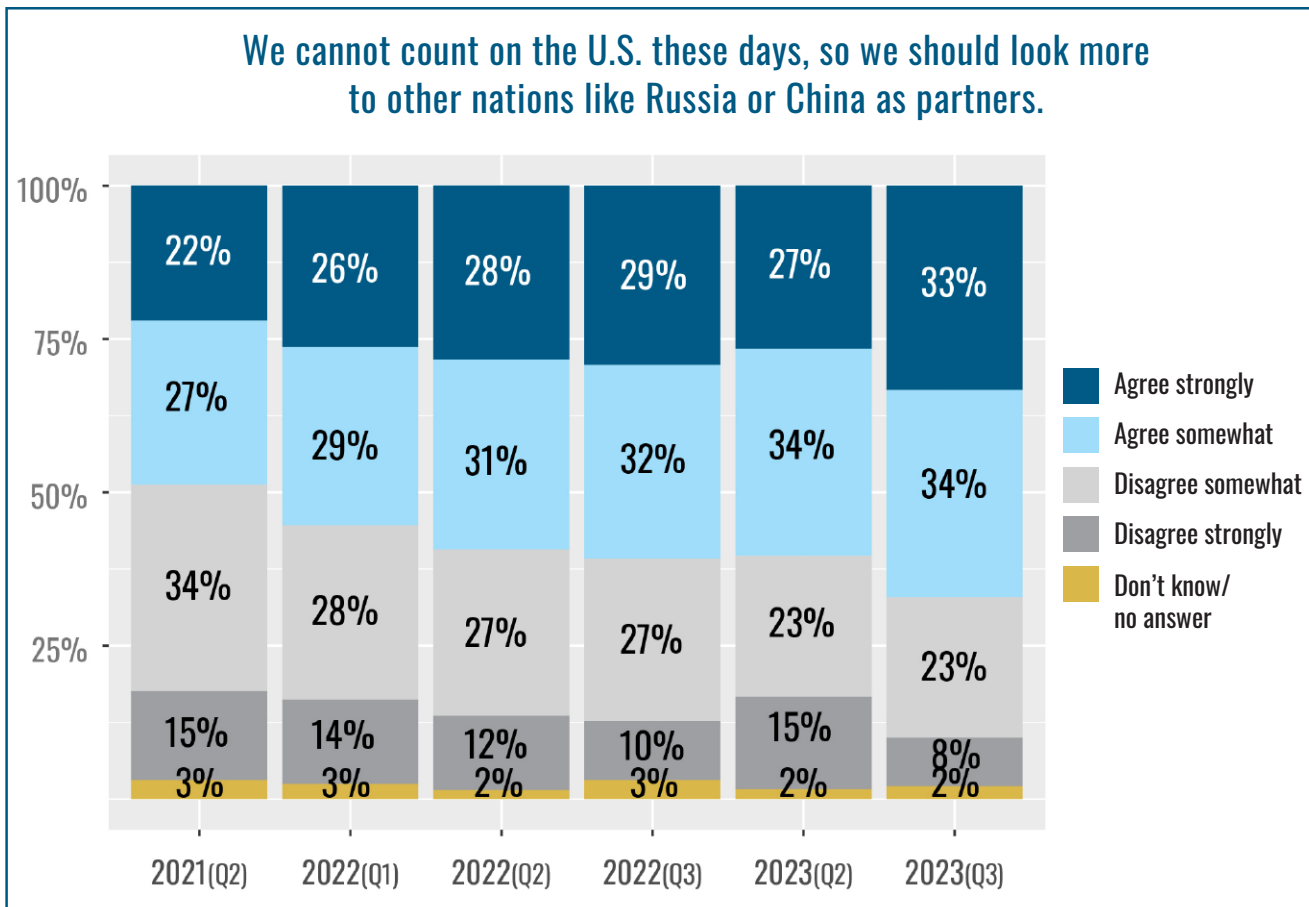


Figure 3.



Surveys in 2015, conducted during the Obama administration, showed little difference, with 16% expressing a positive view. Yet when the survey named President Trump, asking about his policies toward the region “on the whole,” approval increased from 9% (very or fairly good) in 2018–19 to 22% in April/May 2025, compared with near-zero approval for President Biden (26% fairly bad, 72% very bad) (see figure 4). Opinions on Biden’s policies were not always so dire. In summer 2021, about half of Saudis agreed that the change in administration would be positive for the region. Perhaps notably, the very negative views of the Biden administration mirrored those of the George W. Bush administration, as measured in concurrent polling (22% somewhat negative, 72% very negative).

Saudi attitudes toward the policies of Russian President Vladimir Putin and Chinese President Xi Jinping improved between 2018 and 2025, with

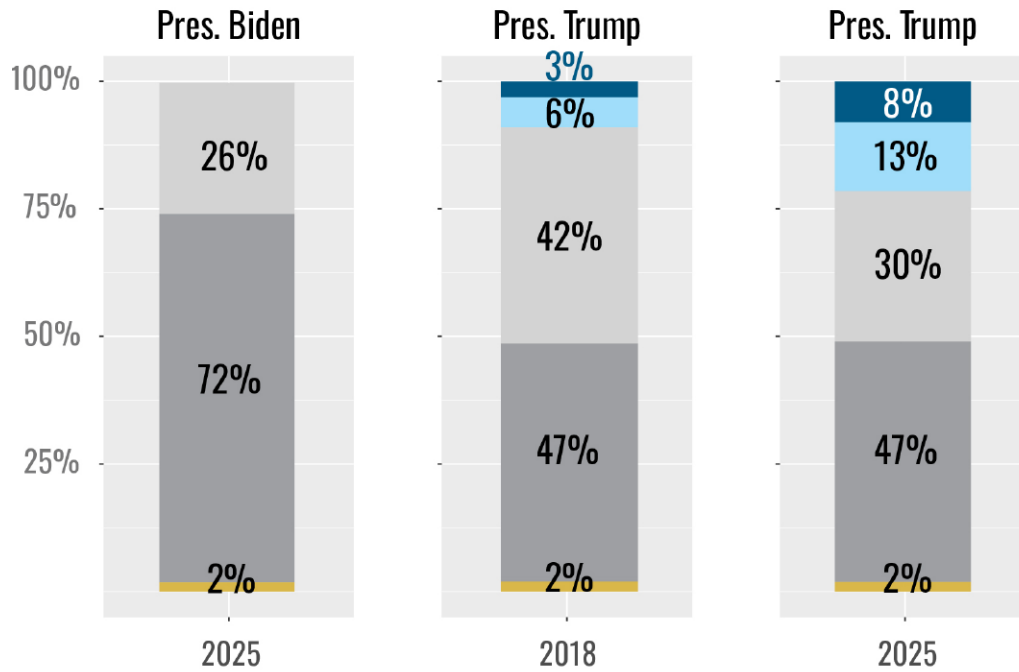
Putin experiencing an increase similar to Trump during the same period, from 9% to 27%. Xi’s numbers rose from a higher starting point: 25% to 46%. He was likely helped in part by increased name recognition in the kingdom; in 2018, 12% said they did not know enough about his policies to express an opinion, versus 2% in 2025 (see figure 5).

Some Saudis lacked what they saw as sufficient knowledge to express views on past U.S. administrations. Among those younger than thirty—who would have been children when American forces toppled the Saddam Hussein regime in Iraq—10% said they did not have enough information about former President Bush to form an opinion. Although in most cases Saudi attitudes in these polls do not differ notably by age, the current question suggests how age may influence overall public opinion in a society trending younger in the next decade.³

Figures 4 and 5.

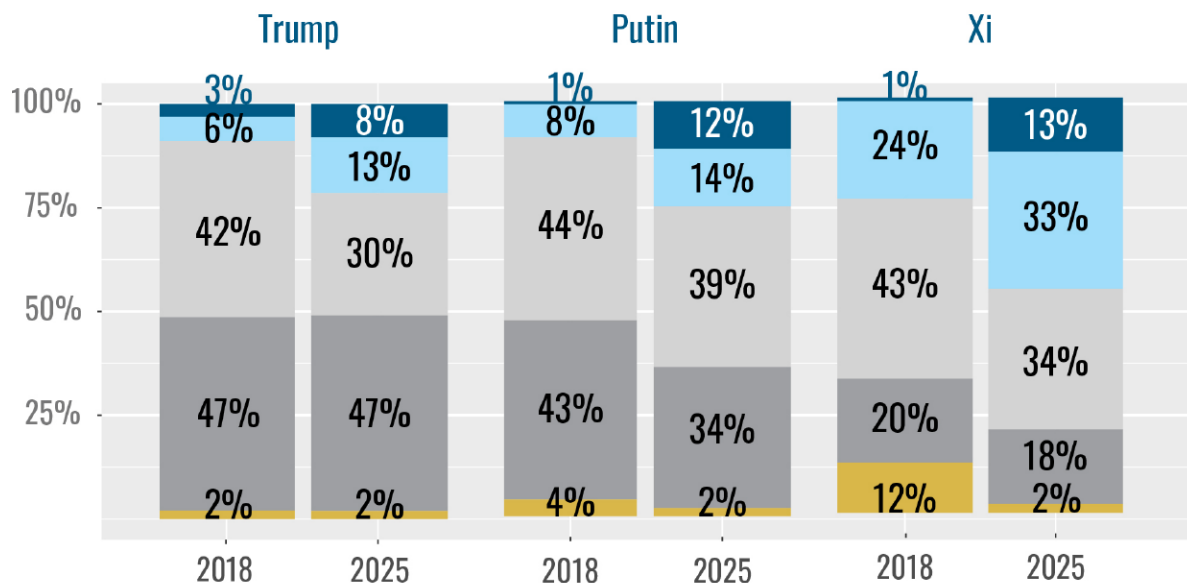
Are each current or former U.S. leader's policies toward our region good or bad on the whole?

Very good Fairly good Fairly bad Very bad Don't know/no answer



Are each leader's policies toward the region good or bad on the whole?

Very good Fairly good Fairly bad Very bad Don't know/no answer



Attitudes toward the United States also appear to be influenced by proximity to Saudi Arabia’s commercial centers. In Jeddah and its environs, as well as in the Eastern Province, home to Saudi Aramco, positive attitudes are notably higher than in other regions—40% there express a positive view of U.S. policies in the region, as compared to 5% in other regions. Conversely, most rural Saudis express highly negative attitudes toward the United States—74% had a very negative view of U.S. policies, compared to 46% of urban respondents overall.⁴

Trend data from Washington Institute polling suggests that negative Saudi views of U.S. policies are long held, notably with regard to military developments. According to a survey in fall 2021, an exception was the American withdrawal from Afghanistan—carried out earlier that year—which was viewed positively by 68% of Saudi respondents. This can be compared to the 72% who viewed the U.S. agreement to “keep a few thousand military advisers in Iraq” as a negative development. But in other cases, Saudis show approval of discrete U.S. military actions, such as the roughly half polled in June 2020 who held a positive opinion of the impact of the targeted U.S. strike in January that killed Gen. Qasem Soleimani, commander of Iran’s Islamic Revolutionary Guard Corps.

Nonmilitary U.S. involvement in the region tends to earn higher, although not majority, approval from respondents. For example, when asked in fall 2022 and spring 2023 about the U.S.-mediated Israel-Lebanon maritime boundary agreement of October 2022, 41% agreed that this was a positive regional development. Likewise, a similar proportion initially saw the “peace agreements” between Israel and Arab states, known as the Abraham Accords, as a positive development (41% in November 2020, 36% in spring 2021).

With respect to Russia’s invasion of Ukraine, Saudis did not necessarily see Moscow as a global spoiler, and a majority indicated a preference for Russian positions regarding the ensuing war. When asked in the April/May 2025 poll whether they agreed that “Russia was the main country responsible for

starting the Russia-Ukraine war in 2022,” just 29% agreed. Earlier, in August 2023, 70% likewise agreed that the best outcome for the war was a “Russian victory, including annexation by Russia of significant Ukrainian territory.”

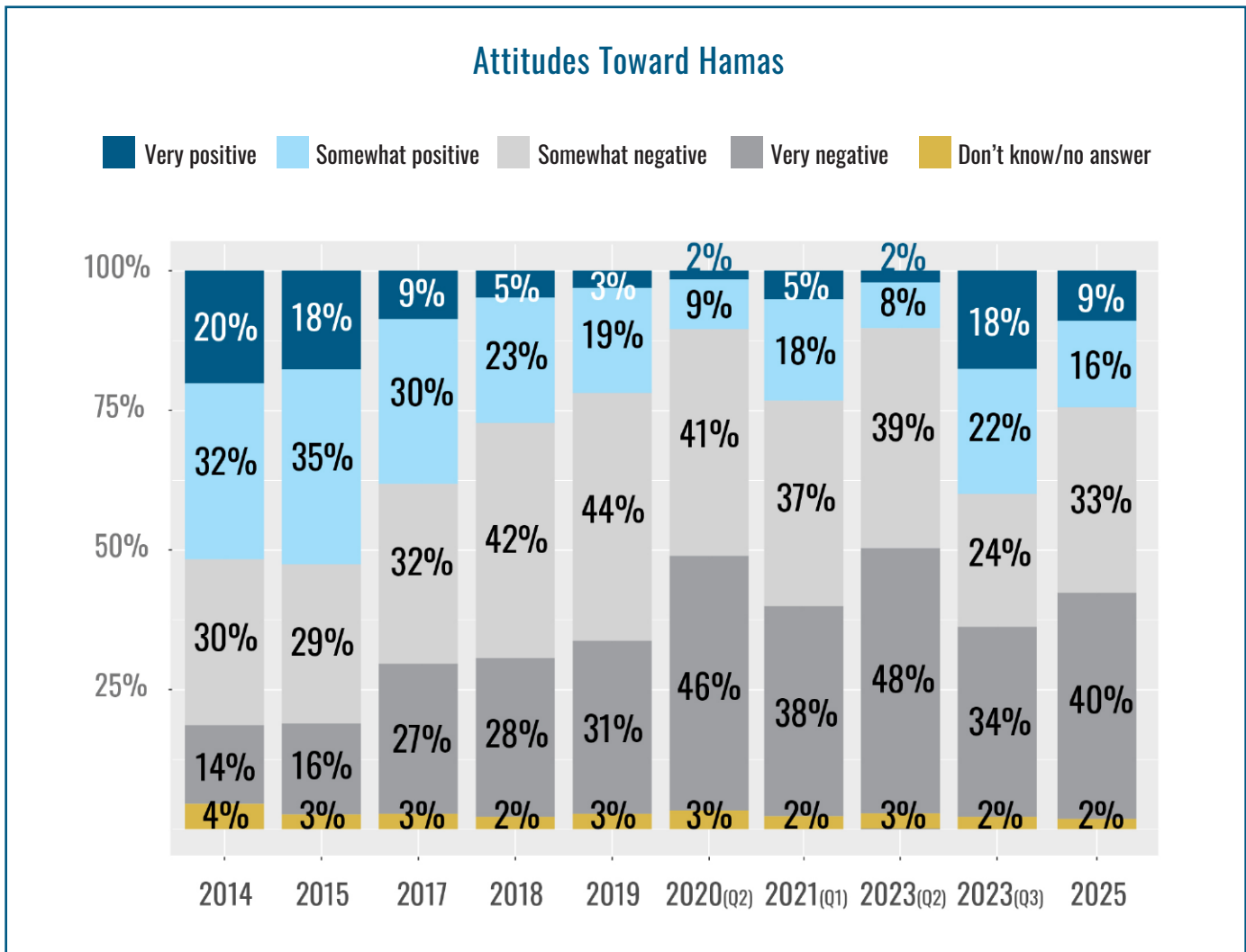
Hamas-Israel War

The early stages of the Gaza war produced a major shift in Saudi attitudes. In the months directly after October 7, 2023, the proportion of Saudis who expressed a favorable opinion of Hamas jumped sharply relative to polling in August 2023. Furthermore, 95% of Saudis surveyed indicated they did not believe Hamas had killed civilians on October 7, and 88% expressed strong agreement with the proposal that “Arab countries should immediately break all diplomatic, political, economic, and any other contacts with Israel in protest against its military action in Gaza.” A similar proportion (87%) agreed that “recent events show Israel is so weak and internally divided that it can be defeated someday.”

Saudi views of Hamas itself have vacillated over the years. Whereas half of respondents expressed a positive view of the group in 2014 and 2015, positive views fell significantly in 2017 and subsequent surveys. Between 2014 and 2020, those expressing “very negative” views of Hamas shot up from 14% to 46%. Such opinions held in August 2023 polling, and after the initial boost provided by the post-October 7 war, support for the group eroded progressively (see figure 6).

Transient increases in support for Hamas have appeared during or immediately after periods of conflict with Israel. This was visible after the May 2021 Hamas-Israel round of fighting in polls conducted in June/July, and more dramatically in November/December 2023. In both instances, positive views jumped from a pre-conflict level of about 10%, by 12 and 30 points respectively. Yet in Washington Institute surveys conducted shortly after

Figure 6.



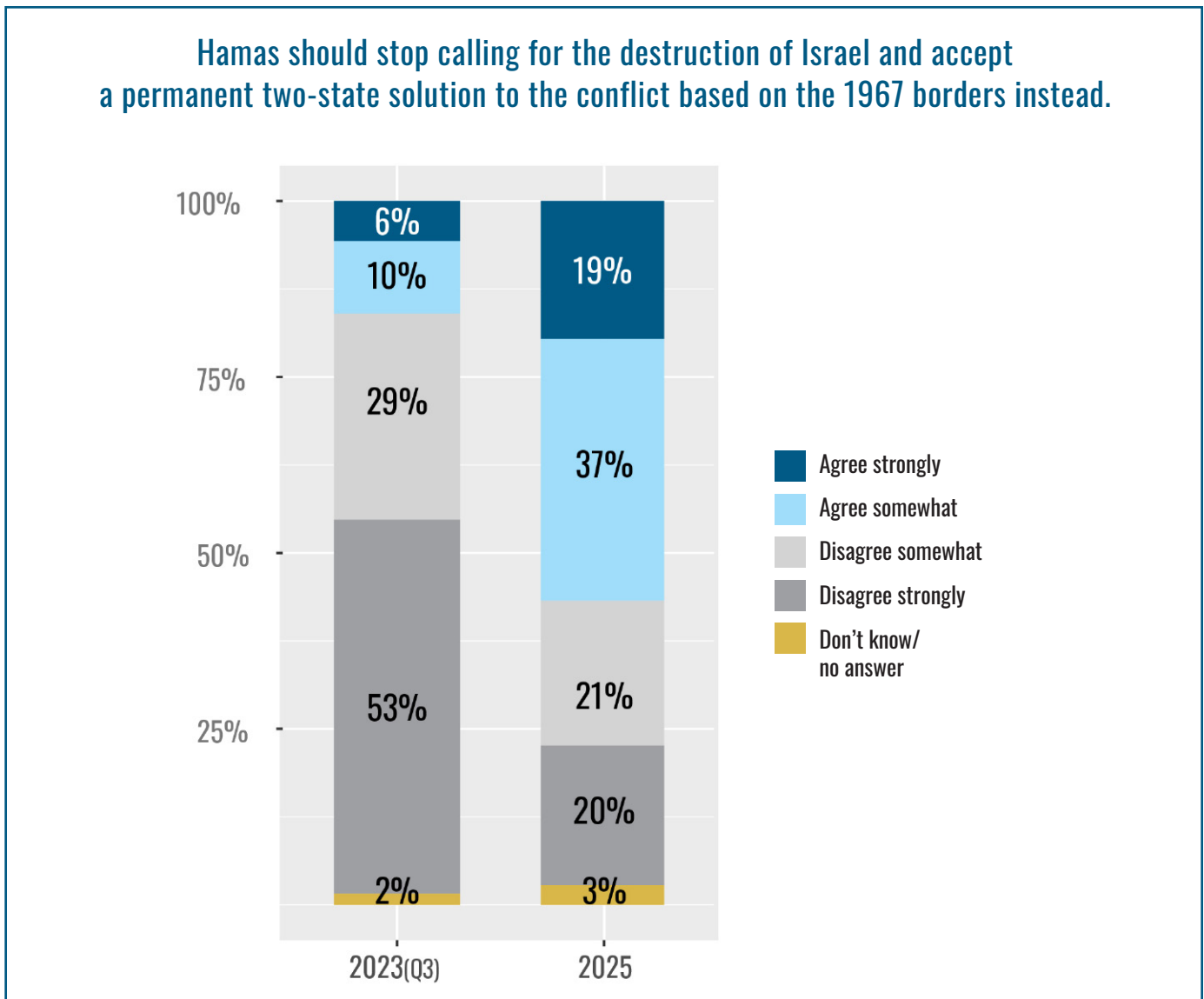
October 7, more Saudis expressed a negative view of Hamas than most other Arab populations polled concurrently. A majority in Egypt, Jordan, Lebanon, and Qatar expressed support for Hamas at that time.⁵

The broad drop in support for Hamas among Saudis polled since 2014 has occurred in tandem with waning support for its ideological progenitor, the Muslim Brotherhood. While 31% of Saudis expressed a positive view of the group in 2014 despite it having been banned months earlier as a terrorist entity,⁶ this support has gradually declined in the intervening decade—although notably 17% expressed a positive view in this year’s poll.

Hamas’s rival, the Palestinian Authority (PA), has been no luckier. Among those Saudis polled, the governing actor’s support has plummeted over the past decade from about half expressing approval in 2014 to just 2% in the May/June 2025 survey.

As for Hamas, the past year of war has altered Saudi opinions about the group’s goals. Whereas in November/December 2023,⁷ just 16% agreed that “Hamas should stop calling for the destruction of Israel and instead accept a permanent two-state solution to the conflict based on the 1967 borders,” more than half now agree with this statement (see figure 7).

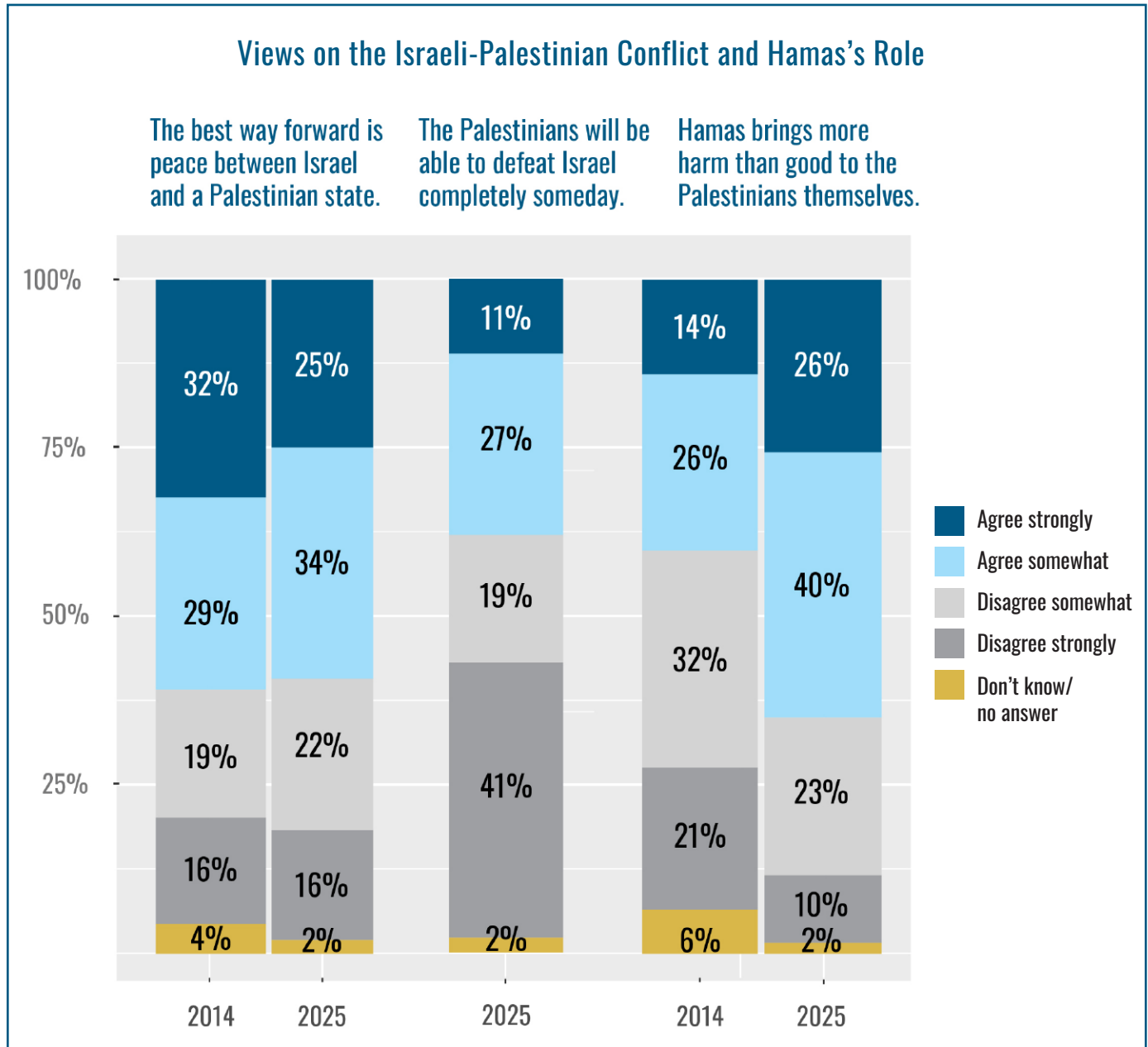
Figure 7.



A longer-term shift is also visible in how Saudis see Hamas and its approach to the conflict. The first wave of this poll was conducted in fall 2014, months after that summer's Hamas-Israel conflict in Gaza. A number of statements posed at that time relating those hostilities to the broader Israeli-Palestinian conflict were refielded this spring to gauge whether attitudes had shifted. On the one hand, a majority of Saudis then and now agreed that the 2014 conflict and 2025 war alike show that "peace between Israel and a Palestinian state" is the best way forward—although slightly fewer agreed strongly with such a proposal in recent polling (see figure 8).

On the other hand, significantly more Saudis (65% vs. 40%) now agree that "Hamas brings more harm than good to the Palestinians themselves." Likewise, the majority of Saudis (60%) are skeptical that the current war demonstrates the Palestinians' ability "to defeat Israel completely someday." And the large majority (83%) agree that whatever Hamas has achieved is too high a price given the Gazans' sacrifice. On the matter of responsibility, when asked whether "the war in Gaza shows that Palestinians and Israelis are both responsible for the continuing conflict between them," 78% agreed, versus 43% who agreed with a similar proposition in June 2020.

Figure 8.



Prior to October 7—in spring 2023 polling—about three-quarters of Saudi respondents agreed that “Hamas firing missiles or rockets against Israel from Gaza” was a negative regional development—compared to June/July 2021, when about half of respondents (49%) said attacks conducted that May had had a negative impact.

Attitudes about the regional impact of the October 7 attack are more ambivalent than attitudes toward

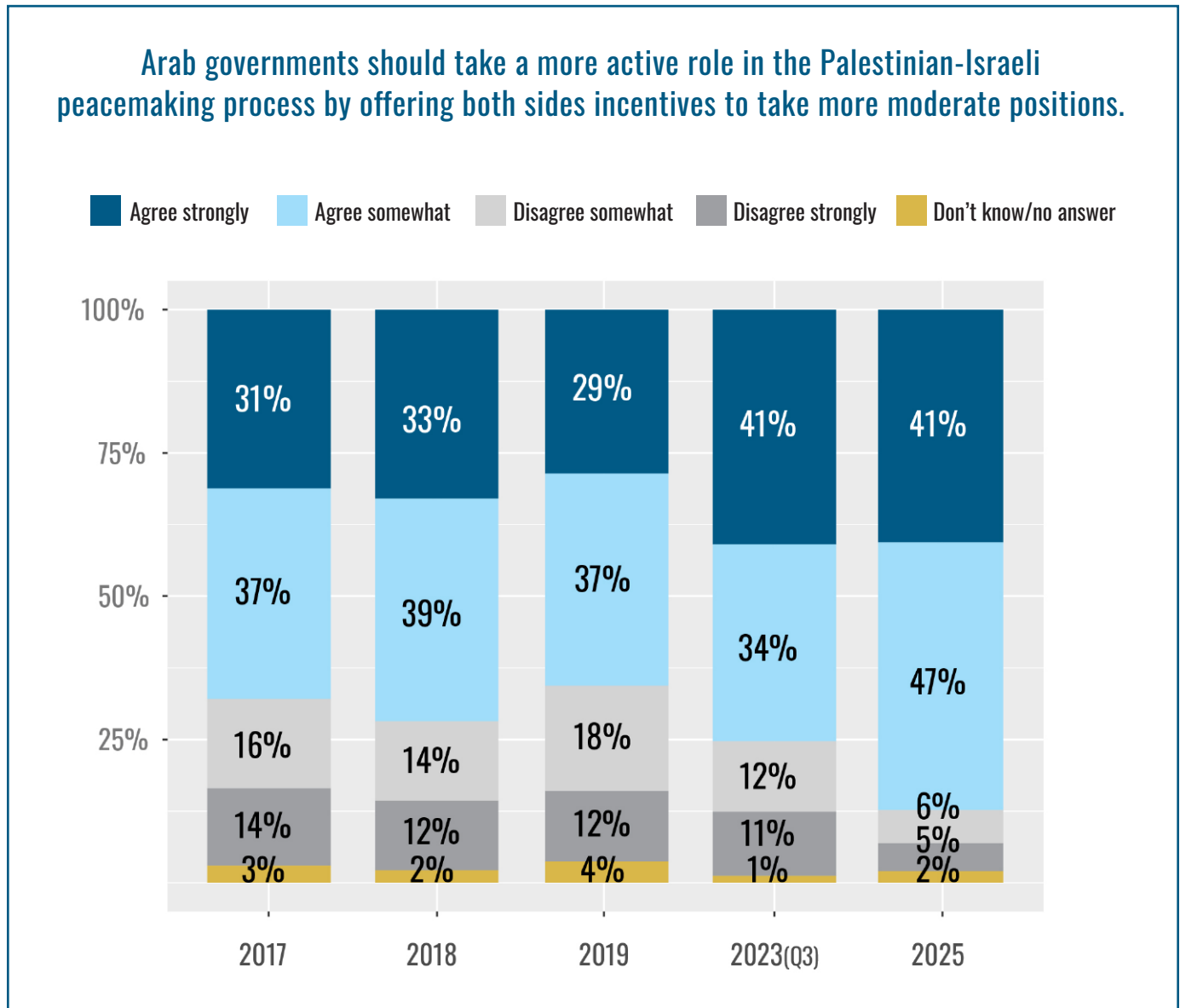
Hamas itself, with Saudis split as to whether the attack was a positive or negative regional development (44% vs. 54%). In looking more closely at the 44% who believed the attack was a positive development, about two-thirds *disagreed* with the statement that “the war in Gaza shows that Palestinian armed conflict against Israel hurts the Palestinian cause for statehood”—whereas of the entire sample, about two-thirds *agreed* with the statement. So in considering the 44% subsample,

one might deduce a greater likelihood of supporting armed struggle more generally—even as a significant minority of this group did not appear to support armed struggle.

When it comes to resolving the Israeli-Palestinian conflict, most Saudis were supportive of Arab initiatives to this end, with 87% agreeing that “Arab governments should take a more active role in Palestinian-Israeli peacemaking by offering both sides incentives to take more moderate positions”

(see figure 9). While this proposition has enjoyed majority support since first being offered in 2017, it has grown even more popular since being posed just after October 7; only 11% now disagree, down from 24% in November/December 2023. Likewise, 91% agree that in light of the war, “Arab countries have a responsibility to help with the reconstruction of Gaza.” Yet 92% of Saudis reject the proposal that the war showed “Arab states should be open to taking some Palestinians from Gaza on a temporary basis as long as they can return someday.”

Figure 9.



No Appetite for Near-Term Normalization with Israel

Public opinion is resistant to normalization with Israel at this time. Normalization lacked significant support in August 2023 prior to the Hamas-Israel war, when the possibility was being widely discussed, and the most recent poll suggests these views are now more strongly held. Yet, as discussed earlier, trend data showed a more positive outlook on the regional impact of peace agreements with Israel when the Abraham Accords were first announced in 2020, with interest waning over the following years (see figures 10 and 11).

When asked whether establishing “normal, peaceful relations” with Israel would be a positive or negative development with respect to “paths forward” for the kingdom, Saudi respondents almost universally answered negative (81%, about half of whom indicated “very negative”). Aside from the 1% who did have a positive view of such a development, a total of 16% indicated it would be neutral.

Whereas in November 2020, 41% of Saudi poll respondents viewed “recent peace agreements” as a positive regional development (only 24% viewed them “very negatively”), the proportion fell to 20% in spring 2023 and then 13% in spring 2025.⁸ Specifically revealing are responses to August 2023 questions about what factors were important in considering whether Saudi Arabia should establish

Figure 10.

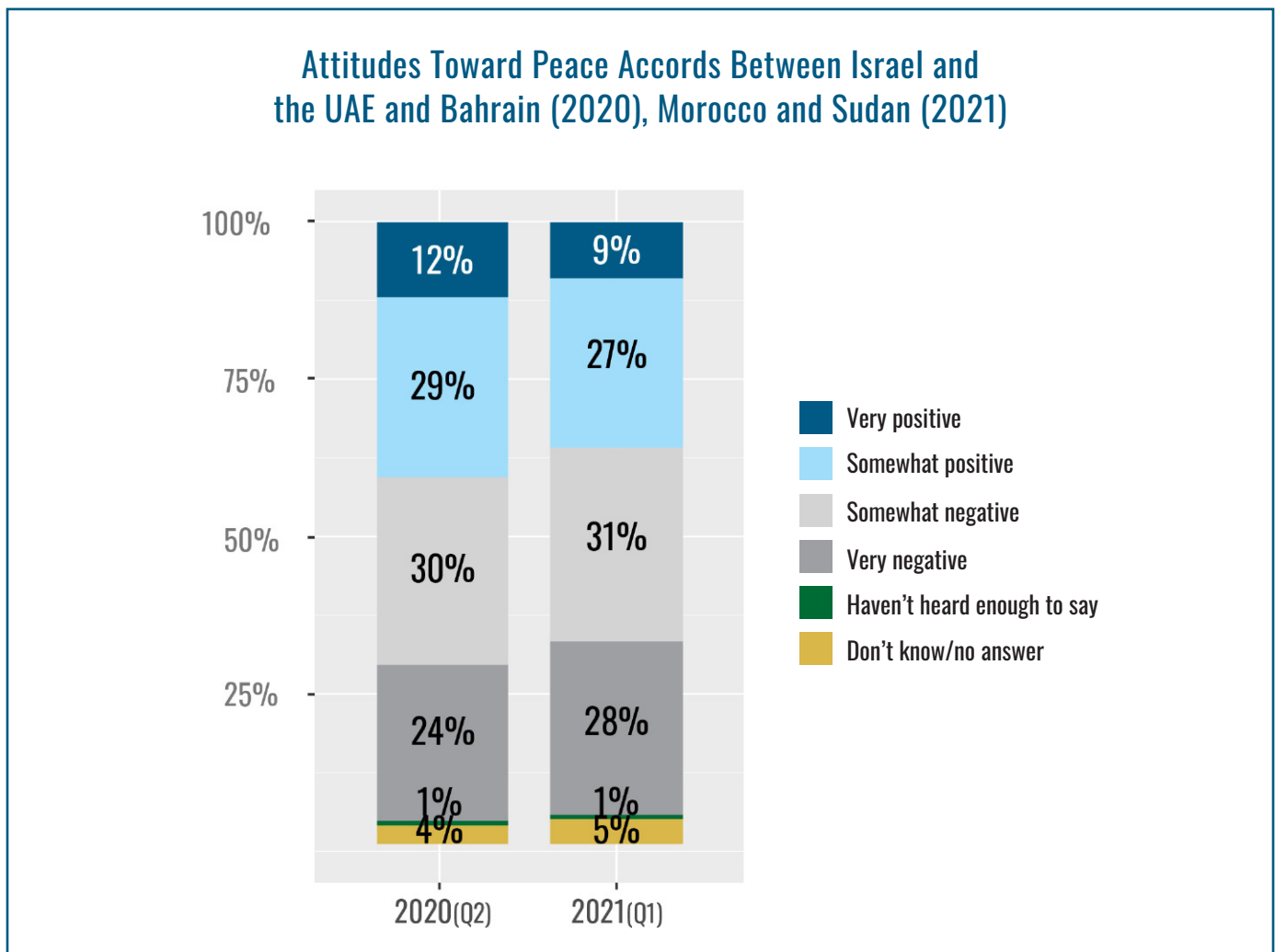
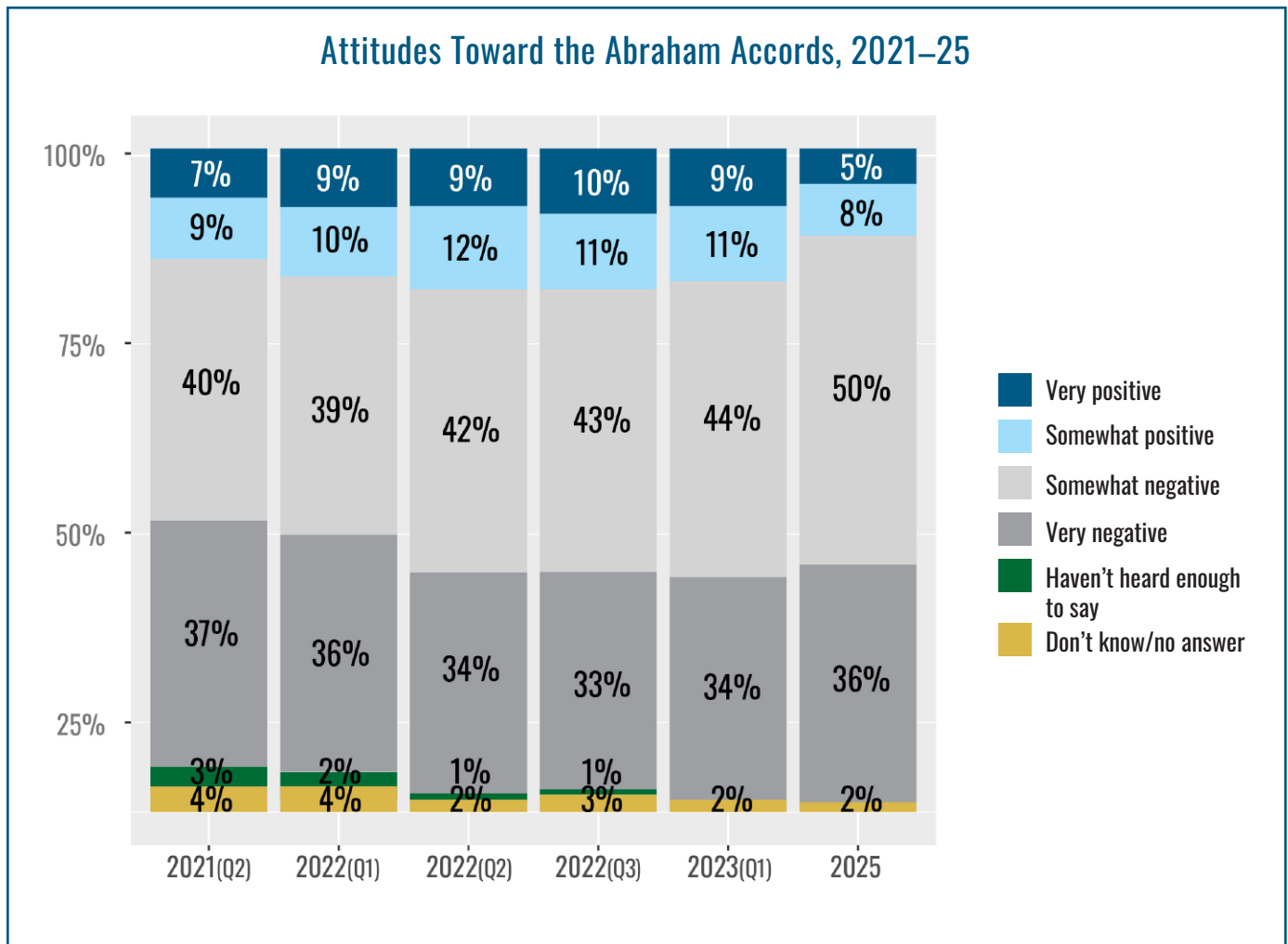


Figure 11.



official relations with Israel. Two were singled out by a significant number of respondents: an increase in Palestinian political rights and opportunities in the West Bank and Gaza (36%), and Israeli guarantees of Muslim rights at Jerusalem's al-Aqsa Mosque and al-Haram al-Sharif (43%).⁹

Saudi respondents show slightly greater openness to allowing business relationships without full normalization—an attitude also expressed in prior years. Although only 3% agree that such a move

would be positive, the “neutral” response is significantly higher than for full normalization (28% vs. 16%). Prior to the war, interest in mutually beneficial economic ties also appealed to a higher proportion of Saudis than other potential benefits of normalization. In spring 2023, when survey participants were presented with the statement “If it would help our economy, it would be acceptable to have some business deals with Israeli companies,” 37% responded affirmatively, compared with 18% who agreed with the idea of cooperation on the threat from Iran.

Saudi Arabia, Iran, and a New Regional Order

In March 2023, Saudi Arabia and Iran restored diplomatic relations after a seven-year rift. Yet in the April/May 2025 poll, a narrow plurality of respondents (44%) still indicated that they place no importance whatsoever on maintaining good relations with Iran, even as that figure represented a drop from 58% in 2017 (see figure 12).

When Saudis were asked about the impact of restoring relations—both in the immediate aftermath of the 2023 announcement and in April/May 2025—most saw it as a negative development for the region (32–33% somewhat negative, 35% very negative). Little movement occurred in the interval between

the two surveys, both of which showed a little less than a third of respondents viewing the rapprochement as positive (see figure 13).¹⁰

Views on the best approach for dealing with Iran’s nuclear program—expressed before the June 2025 war—were decidedly less uniform. When asked the open-ended question “What do you think is the best response from other countries in the Middle East if Iran gets a nuclear bomb?” a minority of Saudi respondents indicated either avoiding direct confrontation (7%) or promoting diplomatic relations (16%). Yet a majority sided with more muscular approaches such as seeking nuclear guarantees from global powers (48%) or pursuit by other countries in the region of nuclear weapons (20%)—an approach Muhammad bin Salman has indicated would be necessary for Riyadh should Tehran get the bomb (see figure 14).¹¹

Figure 12.

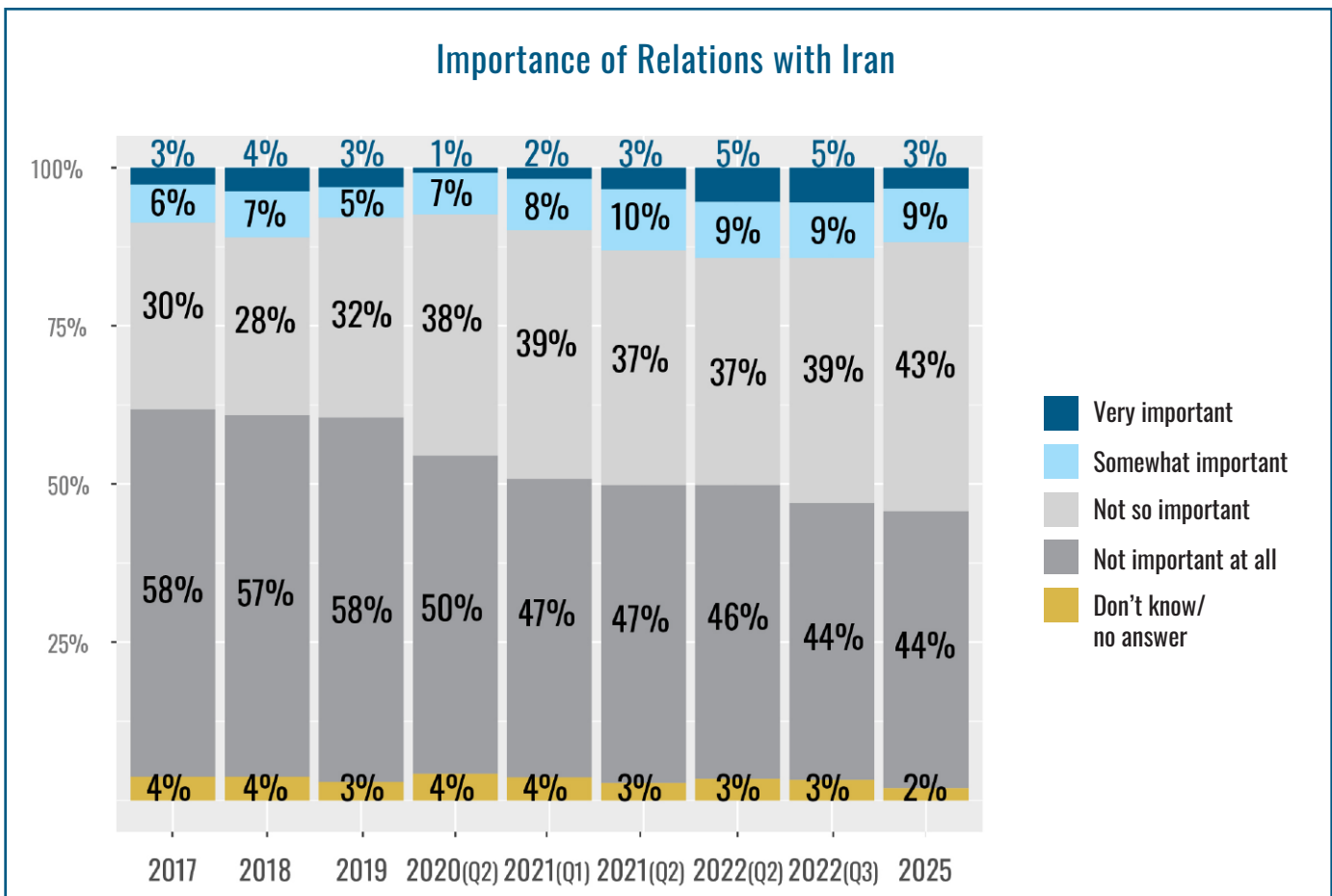


Figure 13.

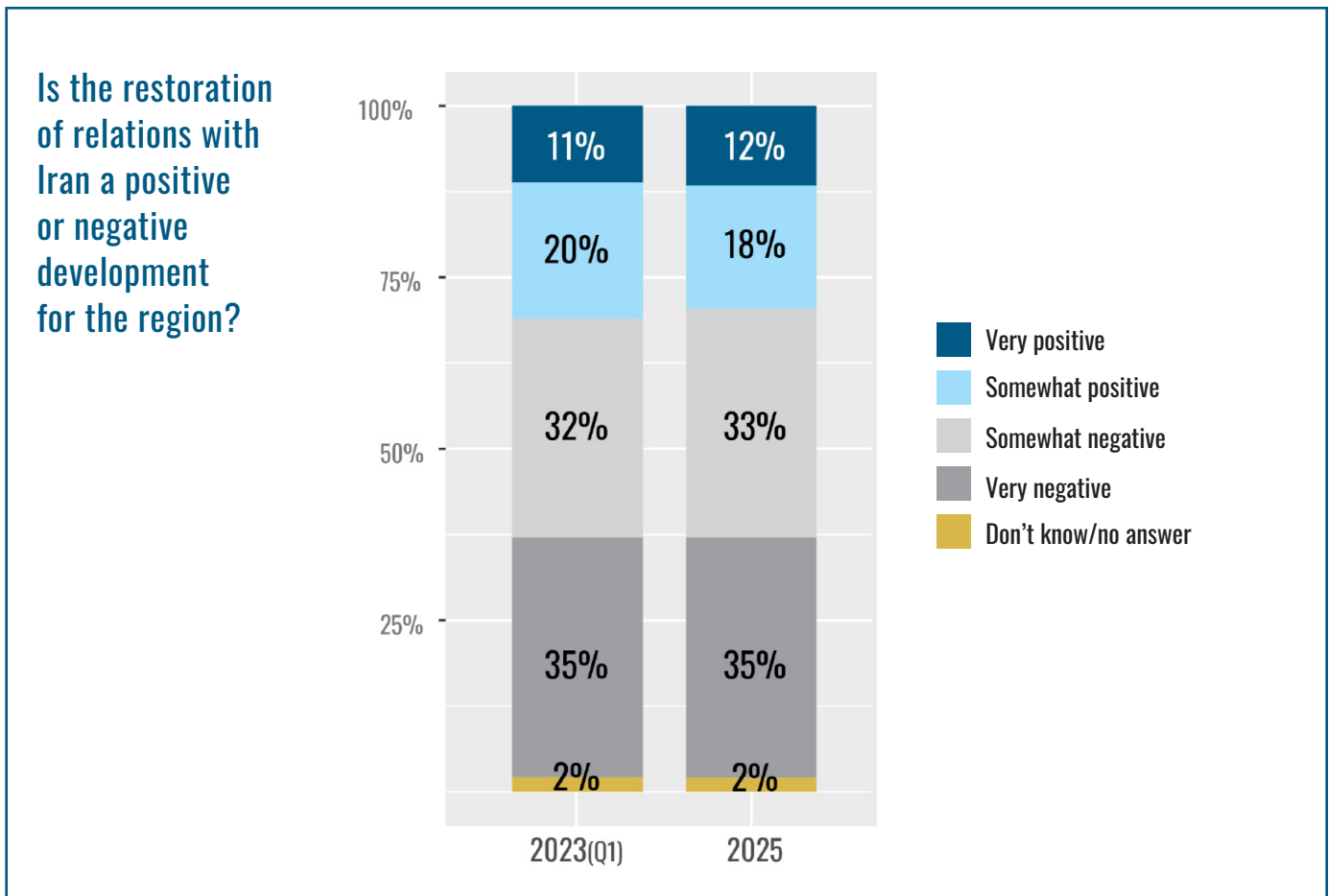
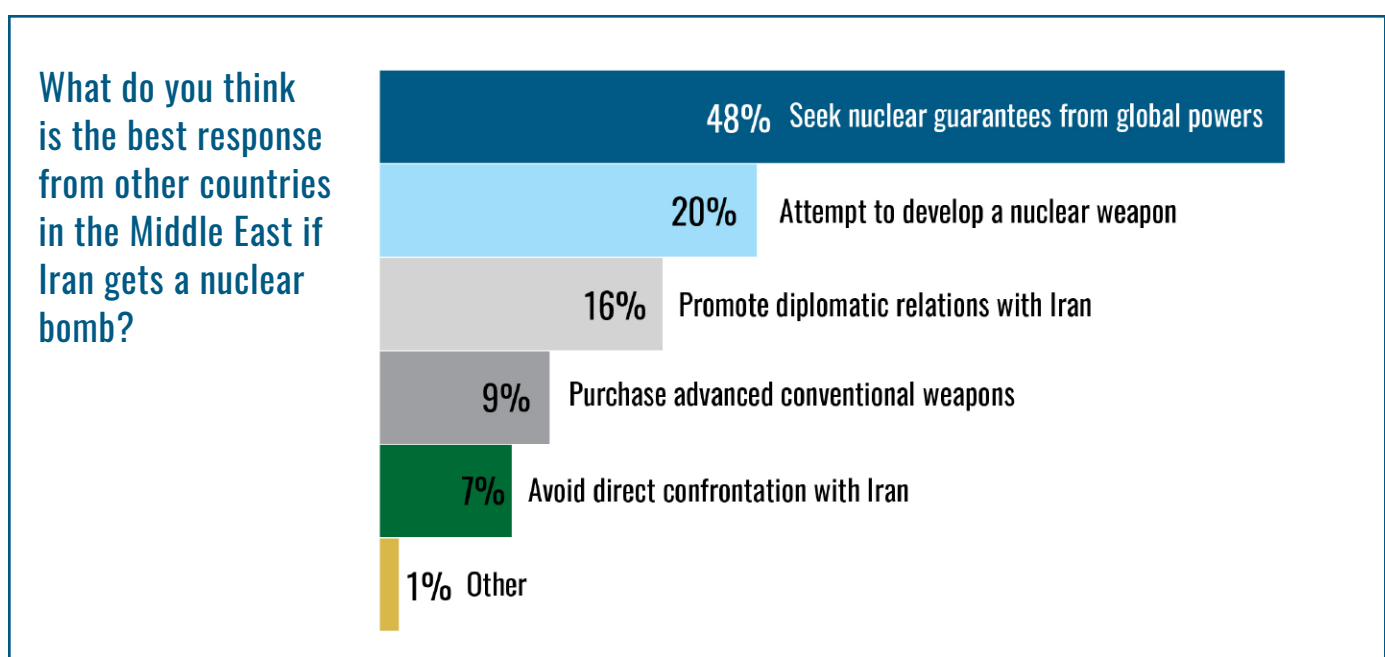


Figure 14.



When queried specifically on the impact of developing “a nuclear program in response to Iran’s nuclear program,” 31% indicated it would be a positive development for the kingdom, whereas 41% indicated that it would be negative. The remainder—about a quarter—registered a neutral opinion. There was more consensus, however, about Saudi Arabia working with “other countries in the region to stop Iranian threats,” with 57% indicating that this would be at least a somewhat positive development.

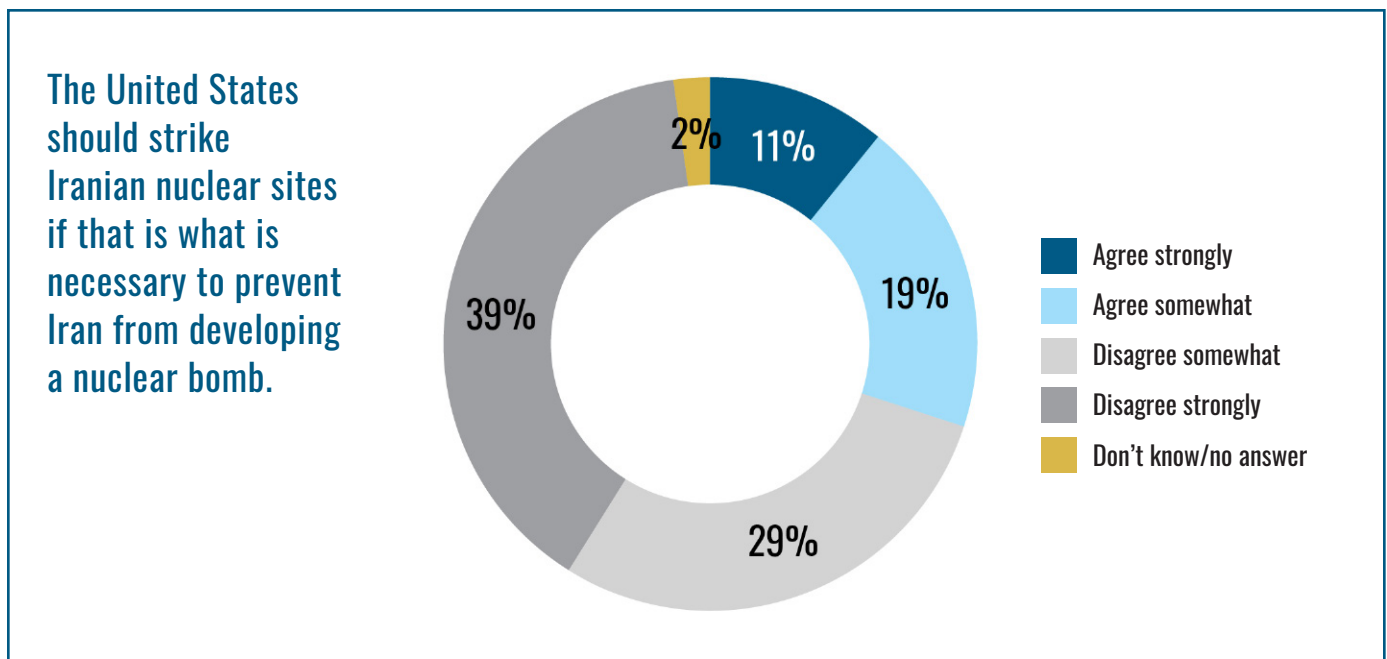
Saudi perceptions of the U.S. approach to this issue have varied, but past views suggest significant openness among respondents to a deal. Initially, in 2015, Saudis polled were split as to whether that year’s nuclear agreement between Iran and outside powers would be good or bad, with about 18% indicating they had not heard or read enough to decide. In 2021, as the Biden administration sought to restart talks, a majority of Saudis expressed a positive opinion on the regional impact of restoring a nuclear deal. In spring 2022, a smaller yet still significant proportion (40%) agreed that such a development would be positive.¹² Meanwhile, when asked just prior to the June 2025 Iran-Israel conflict whether they agreed that the United States should

strike Iran “if that is what is necessary to prevent Iran from developing a nuclear bomb,” less than a third agreed (see figure 15).

Regarding the degradation of Iran’s proxy groups in the region, the majority of Saudis surveyed (64%) agreed that the Gaza war had demonstrated that “Iran’s strategy to use armed groups to attack its enemies in the Middle East has been a failure.” But there was no consensus around the impact of either Iran’s April and October 2024 missile attacks against Israel or Israel’s 2024 strikes inside Iran. Nevertheless, a higher proportion of Saudis (54%) agreed that Iran’s attacks against Israel had a positive impact on the region than those who said the same about Israel’s destruction of Iran’s air defense and ballistic missile systems (31%). A significant proportion (39%) even viewed as a positive development the “Houthi attacks on Red Sea shipping lanes in response to the war in Gaza.”

Further, more than half (57%) of respondents who held a positive view of Israel’s destruction of Iran’s defenses said the same about Iran’s attacks on Israel, demonstrating that the same respondent could view Israeli and Iranian military actions positively.

Figure 15.



Lebanon and Syria

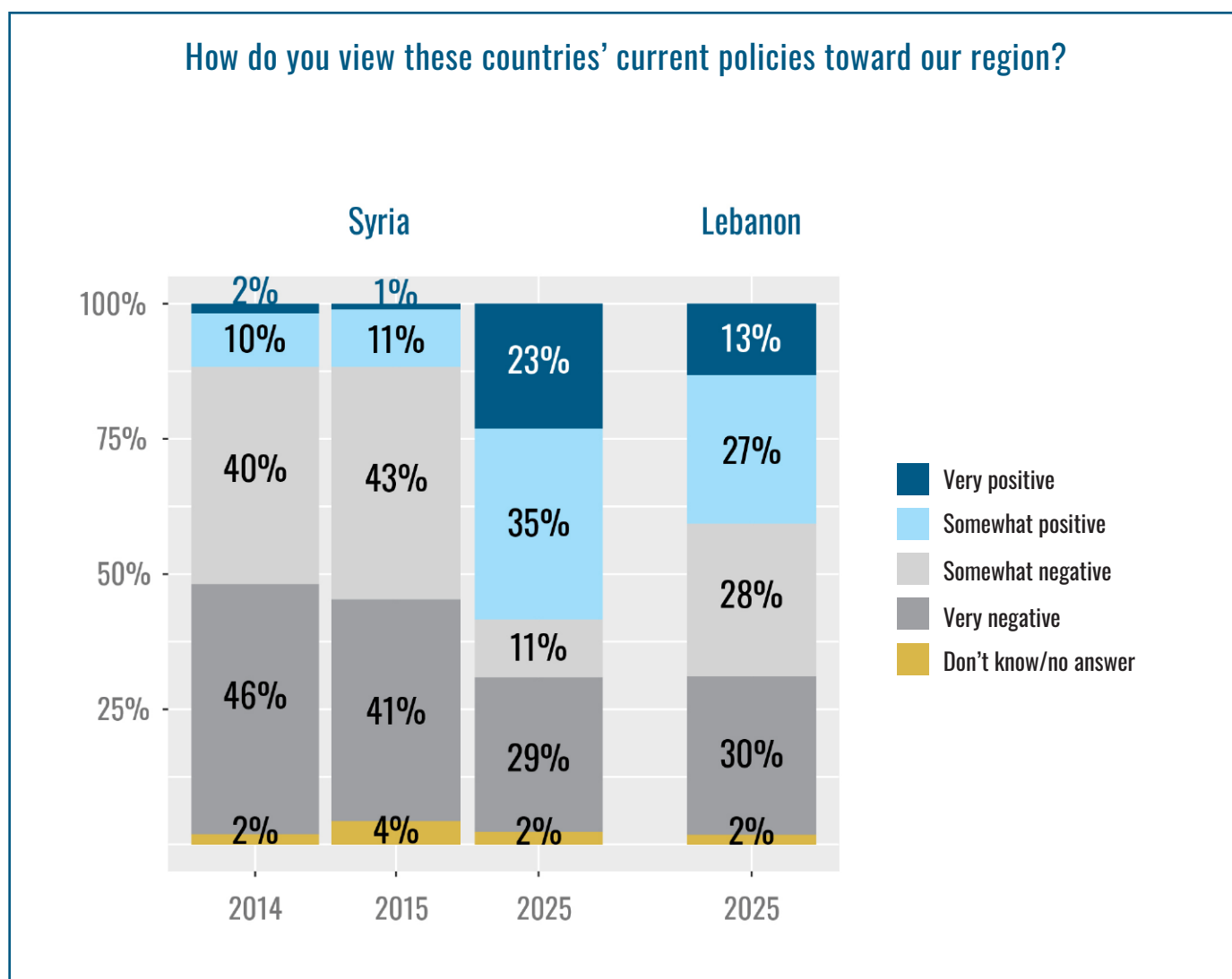
Whereas most Saudis impart positive views about the fall of former Syrian President Bashar al-Assad, attitudes toward the new leadership—while majority positive—are more split. Attitudes are even more ambivalent about Lebanon’s new leaders. This is noteworthy in light of the Saudi government’s significant efforts to support the new leaders in both countries (see figure 16).

In Syria’s case, most Saudis remain optimistic about

the regional impact of Assad’s fall, which is consistent with the majority negative attitudes toward the Assad regime in past years. In June 2020, just 12% of Saudis agreed even somewhat that “we should accept the reality that Bashar al-Assad will stay in power in Syria and restore full relations with his government.” And even during a period of attempted rapprochement between Gulf states and the Assad regime in March/April 2023, a majority of Saudi respondents (61%) saw this as a negative regional development.

In the April/May 2025 poll, Saudis almost universally viewed the collapse of the Assad regime as a positive

Figure 16.

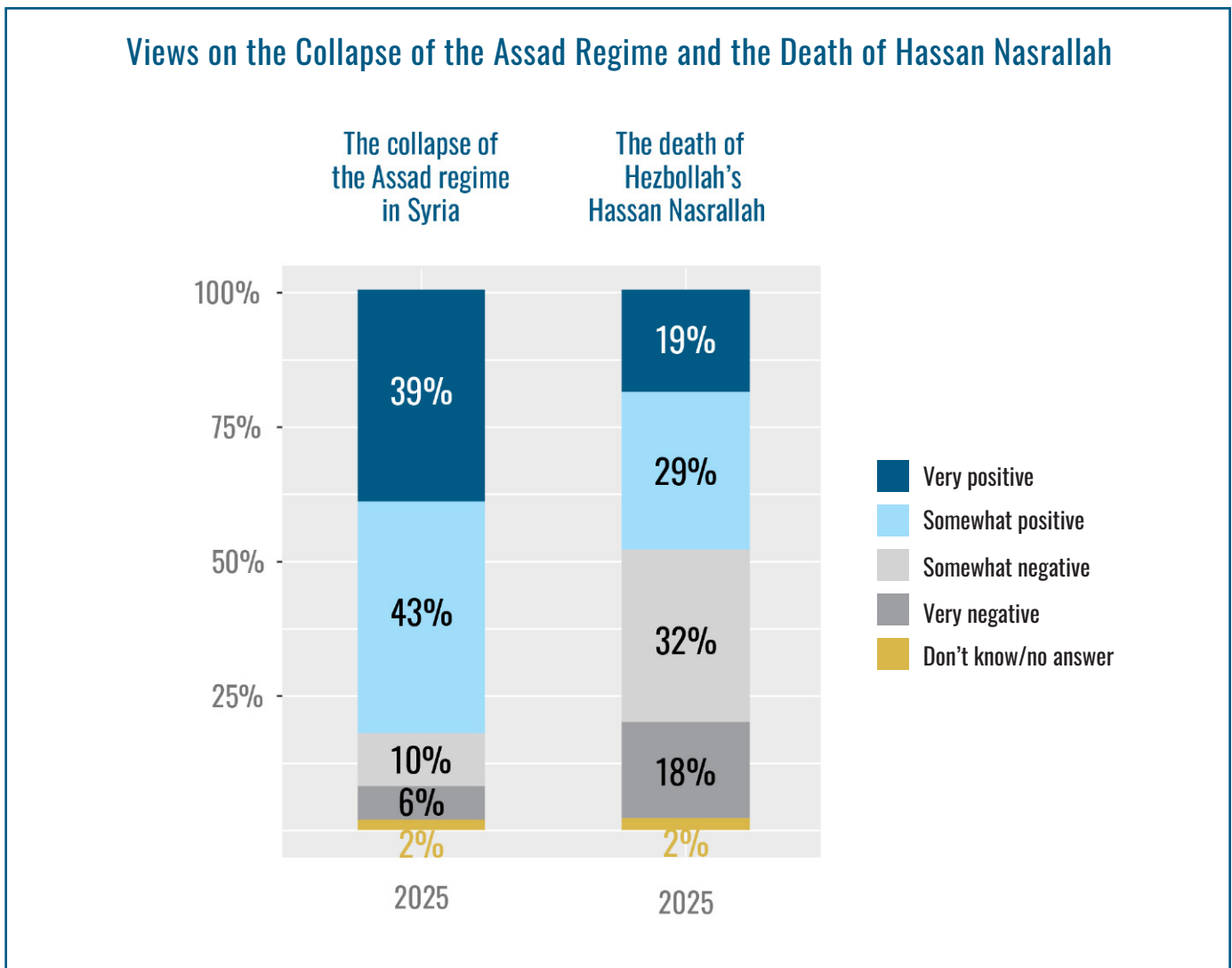


development for the region (82%). Yet even as most (58%) likewise viewed the regional policies of the new Damascus leadership positively, the figure suggests something more tenuous, including when set against the 84% who saw Assad-regime policies toward the region negatively in 2015. The 24-point gap between support for Assad's ouster and support for his successor suggests a belief among a significant minority that President Sharaa's government has not proved itself as a positive actor in the region.

With respect to Lebanon, only 41% of Saudis polled

indicated that they find the government's regional policies to be at least somewhat positive, suggesting greater concern than with Syria. And set against their largely positive response to Assad's fall, respondents were evenly divided on whether Hezbollah Secretary-General Hassan Nasrallah's death had a positive or negative impact on the region (see figure 17). Views about Hezbollah as an entity were darker, with more than 90% regarding the group negatively, following a slight jump in support after October 7. Those who see the group in a "very negative" light rose from 48% in 2014 to 71% in 2017, a figure that effectively holds today.

Figure 17.



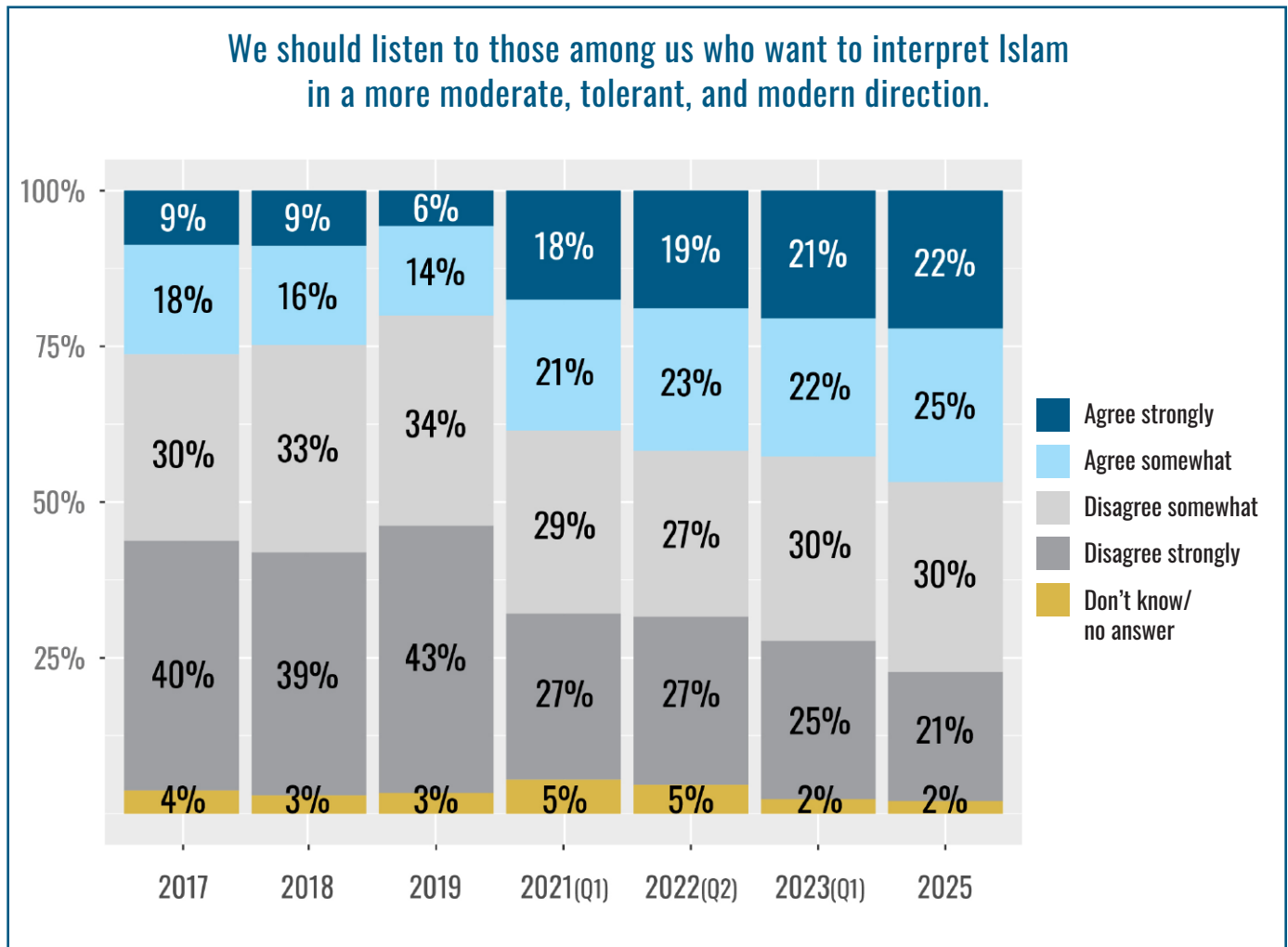
Trending Support for Moderate Islam

In recent years, an increasing proportion of Saudis polled agree that “we should listen to those among us who want to interpret Islam in a more moderate, tolerant, and modern direction.” According to trend data, attitudes on this question warmed noticeably between 2019 and 2021, and have continued slowly but surely on this trajectory since June/July 2021. The Saudi kingdom has increasingly incorporated the concept of “moderation” in Islamic jurisprudence and thought in its public discourse (see figure 18). For example, in April 2021, MbS stated in an

interview that “all Muslim jurists and scholars have been talking about the concept of moderation for over a thousand years.”¹³

During summer 2023, matching this trend, just 50% agreed with an inverted formulation of this statement—“We must support those among us who advocate the traditional view of Islam and oppose those who are trying to interpret Islam in a more modern direction.” In a poll conducted a few months earlier, in spring 2023, 55% similarly disagreed with the idea of listening to those who want a more moderate or modern interpretation of Islam. In the April/May 2025 poll, moreover, most Saudis (76%) agreed with the suggestion that they should work to improve “relations between Muslims and believers from other religions.”

Figure 18.



Opportunities and Risks

This latest polling indicates a number of potential opportunities for U.S.-Saudi coordination, while also highlighting potential risks for the bilateral relationship. Specifically, if U.S. officials seek to coordinate further with Arab partners on reconstruction and rehabilitation in Gaza should a ceasefire happen, Saudi officials will have clear public approval on these issues. Most Saudis believe that Arab governments should contribute to Gaza's reconstruction, and the Saudi state has a popular mandate to involve itself in peacemaking. The Saudi public's current majority rejection of Hamas also highlights a possible opportunity for Washington and Riyadh to jointly emphasize the group's failed efforts to employ terrorism and violence as a form of resistance and to condemn these tactics.

And as Washington formulates its policy toward Syria's new government, Saudi public enthusiasm for the fall of Assad—along with a broader rejection of Islamist movements—suggests room for the U.S. government to work with Riyadh to provide both incentives and deterrents to help reintegrate Syria into a broader regional architecture.

Opportunity may also present itself on next steps in response to Iran's nuclear weapons program, given the past majority support among Saudis polled for

U.S. negotiations as well as concerns around a military approach to deterring Iran's program. Since the U.S. government is interested in negotiating on this issue, it can benefit from regional consultation and inclusion of partners like Saudi Arabia in crafting policy toward Iran.

The U.S. government should meanwhile gauge the risks of encouraging Saudi Arabia to pursue policies with little popular support. Given the lack of interest in normalization with Israel, pushing for it too aggressively may backfire, since the public does not believe in its benefits. The somewhat greater openness to economic ties may instead offer a pathway to continue building ties and integration until political context and public attitudes shift on normalization.

Saudi public attitudes themselves may pose a risk to the shape of future bilateral relations, constituting a matter of special concern for Washington. The Saudi government has a popular mandate to balance its foreign relations between the United States and its global competitors, and the U.S. government should take seriously the limited popular support for prioritizing a partnership with America. A proactive approach for Washington would entail seeking to understand the underlying drivers of these attitudes in order to engage with the Saudi public in new ways—namely, by addressing concerns and highlighting diplomatic regional accomplishments more likely to earn popular support. ❖

Appendix A. Methodology

Sampling is based on the 2022 Saudi General Authority for Statistics (GASTAT) census and includes urban and rural households in all administrative regions except the Northern Border region—comprising approximately 1% of the population—whose remote location creates logistical challenges for surveys.

Administrative regions served as primary sampling units (PSUs), stratified by urbanicity. Secondary sampling units (SSUs) were selected from city or village lists via probability proportional to size (PPS), divided into equally sized grids with blocks selected using simple random number selection. Ten interviews were conducted per block via the right-turn approach, and interviews were conducted at every *n*th household,¹⁴ with “*n*” determined by a prior visit by a field supervisor to estimate housing density.

Within households, respondents were selected by Kish grid, with a maximum of three attempts made on different days and at different times of day to contact the chosen respondent if initially unavailable. Interviews were conducted with gender-matched interviewers, with a questionnaire translated into Modern Standard Arabic and back-translated to ensure consistency. A pretest was likewise conducted to ensure questions were well understood.¹⁵

A review of quality-control measures helps address questions about the reliability of various types of public opinion polling data, especially in contexts where open-access surveys are relatively rare. For this poll, the following steps were taken to ensure data quality:

- **Face-to-face interviews.** In-person surveys conducted by trained interviewers at respondents’ residences help ensure high-quality responses representative of the total population.
- **Probabilistic sampling.** Probability-based surveys use census data to reach a randomized group of people across the country, rather than relying on volunteers to respond to surveys (opt-in surveys). Because volunteers may be unusually interested in the interview topic or motivated to respond in a certain way, randomization helps ensure that the polling sample is representative of Saudi public attitudes.¹⁶
- **Post-survey demographic indicators.** The demographic makeup of the polling sample is compared to available demographic information from GASTAT to ensure the sample closely resembles the actual Saudi population, and post-stratification weighting adjusts the sample to best resemble the gender and age makeup of the Saudi population.¹⁷ (See table 1 for a comparison of the survey sample and Saudi census data.)
- **Sensitivity to sensitive questions.** Questions are avoided on topics deemed too sensitive and likely to elicit self-censorship.
- **Trend data consistency.** The current polling data is compared to the Institute’s historical database of fifteen Saudi surveys over the past decade, both for demographic consistency and to ensure that responses to previously “stable” trend questions do not fluctuate in unexpected or unexplained ways. Stable trend data helps provide more confidence in responses to questions where wider attitudinal shifts are expected, and helps ensure that more gradual trends observed over time are accurate.

Table 1. Comparison of Survey Sample to Saudi Census Data

	Sample Male	Census Male	Sample Female	Census Female
55 and older	10.9%	14.4%	13.8%	15.5%
50–54	7.1%	5.7%	6.1%	6.1%
45–49	8.4%	7.4%	9.2%	7.6%
40–44	9.6%	10.2%	10.1%	10.2%
35–39	14.1%	12.4%	15.1%	12%
30–34	13.8%	13.7%	11.1%	13.5%
25–29	16.1%	14.7%	15.3%	14.3%
18–24	20.1%	21.6%	19.3%	20.9%
	100%	100%	99.9%	100.1%

Source: Saudi General Authority for Statistics, “Population Estimates Publication 2024,” <https://www.stats.gov.sa/documents/20117/2435273/Population+Estimates+Statistics+2024+EN.pdf/9b71e303-5fd9-19cb-9913-850a9d521639?t=1738859947691>.

Appendix B. Questionnaire

1.

There are different views about the current policies of various countries toward our region. I would like to mention a few of these countries, and for each one, please tell me whether you have a positive or negative opinion of its policies toward our region right now.

Is your opinion of [GOVERNMENT/COUNTRY] very positive, somewhat positive, somewhat negative, or very negative?

- a. The new government of Lebanon
- b. Turkey
- c. The new leadership in Damascus, Syria
- d. Iran

2.

And how about the following countries? Please tell me if you have a positive or negative opinion of each country's policies toward our region right now.

Is your opinion of [COUNTRY] very positive, somewhat positive, somewhat negative, or very negative?

- a. Qatar
- b. United States
- c. Russia
- d. China

3.

And now, focusing more specifically on the leaders of some countries, please tell me if you think each leader's policies toward our region are good or bad on the whole.

Are [LEADER]'s policies toward our region very good, fairly good, fairly bad, or very bad—or have you not heard or read enough about them to say?

- a. Chinese President Xi Jinping
- b. Turkish President Recep Tayyip Erdogan
- c. Russian President Vladimir Putin
- d. Iranian Supreme Leader Ayatollah Ali Khamenei

4.

And thinking about current and past leaders of the United States, please tell me if you think their policies toward our region have been good or bad on the whole.

Have the policies of [U.S. PRESIDENT] toward our region been very good, fairly good, fairly bad, or very bad—or have you not heard or read enough about them to say?

- a. Current President Donald J. Trump
- b. Former President Joe Biden
- c. Former President Barack Obama
- d. Former President George W. Bush

5.

I would also like to ask about our country's relations with some of these other countries. For each one, and regardless of your personal opinion about the other country's policies, please tell me how important or unimportant you think it is for our country to have good relations with that country.

For [COUNTRY], is it very important, somewhat important, not so important, or not important at all for our country to have relations with it?

- a. Iran
- b. United States
- c. Russia
- d. China

6.

Now, thinking about paths forward for Saudi Arabia, to what extent do you think the following would be a positive or negative development for Saudi Arabia?

Would [DEVELOPMENT] be a very positive, somewhat positive, neutral, somewhat negative, or very negative development?

- a. Working with other countries in the region to stop Iranian threats

- b. Establishing a nuclear program in response to Iran's nuclear program
- c. Allowing Saudi businesses to have business relations with Israeli companies
- d. Establishing normal, peaceful relations with Israel

7.

There are also different views today about various organizations or movements in our region. Please tell me if you have a positive or negative opinion of each organization or movement.

For [ENTITY], do you have a very positive, somewhat positive, somewhat negative, or very negative opinion?

- a. Palestinian Authority in Ramallah
- b. Muslim Brotherhood
- c. Hezbollah in Lebanon
- d. Hamas in Gaza

8.

There have been a number of significant developments in our region over the past several years. For the following events, please tell me if you think this event is having a positive or negative impact on our region.

Is [EVENT] having a very positive, somewhat positive, somewhat negative, or very negative impact on our region?

- a. The Abraham Accords peace agreements between Israel and the UAE, Bahrain, Morocco, and Sudan
- b. The death of Hezbollah Secretary-General Hassan Nasrallah
- c. Iran's missile attacks on Israel in 2024
- d. The collapse of the Assad regime in Syria

9.

And thinking about the positive or negative impacts of some more developments, is [EVENT] having a very positive, somewhat positive, somewhat negative, or very negative impact on our region?

- a. Hamas's attack on Israel on October 7, 2023
- b. The restoration of diplomatic relations between Saudi Arabia and Iran in March 2023
- c. Israel's destruction of Iran's air defense and ballistic missile systems
- d. Houthi attacks on Red Sea shipping lanes in response to the war in Gaza

10.

What do you think is the best response from other countries in the Middle East if Iran gets a nuclear bomb [OPEN-ENDED RESPONSE]?

11.

Next, people have different opinions about various issues in the news lately. I will read you a few statements, and for each one, please tell me the extent to which you agree or disagree with them.

Do you strongly agree, agree somewhat, disagree somewhat, or strongly disagree with the following [STATEMENT]?

- a. Right now, internal political and economic reform is more important for our country than any foreign policy issue.
- b. We should listen to those among us who want to interpret Islam in a more moderate, tolerant, and modern direction.
- c. We should work to improve relations between Muslims and believers from other religions.
- d. Arab governments should take a more active role in the Palestinian-Israeli peacemaking process by offering both sides incentives to take more moderate positions.

12.

Next, I have a few other statements about various issues in the news lately. For each proposal, please tell me the extent to which you agree or disagree.

Do you agree strongly, agree somewhat, disagree somewhat, or disagree strongly with the following [STATEMENT]?

- a. Russia is the main country responsible for starting the Russia-Ukraine war in 2022.

- b. Hamas should stop calling for the destruction of Israel and accept a permanent two-state solution to the conflict based on the 1967 borders instead.
- c. Recent events show that the Iranian regime is weak when it comes to its control over its own country right now.
- d. The United States should strike Iranian nuclear sites if that is what is necessary to prevent Iran from developing a nuclear bomb.

13.

I will now read two statements about what Hamas has achieved since its attack on October 7 compared to the loss of lives and property in Gaza. Please tell me which one is closer to your point of view.

- a. What Hamas has achieved is worth all the sacrifices the people of Gaza have made.
- b. The sacrifices the people of Gaza have made are too severe for what Hamas has achieved.

14.

Now, please tell me the extent to which you agree or disagree with the following statements on the recent war in Gaza. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following [STATEMENT]?

- a. The war in Gaza shows that Palestinians and Israelis are both responsible for the continuing conflict between them.
- b. The war in Gaza shows that the Palestinians will be able to defeat Israel completely someday.
- c. The war in Gaza shows that Arab countries have a responsibility to help with the reconstruction of Gaza.
- d. The war in Gaza shows that Hamas brings more harm than good to the Palestinians themselves.

15.

And thinking about some other views on the recent war in Gaza, please tell me the extent to which you agree or disagree with these other statements.

Do you agree strongly, agree somewhat, disagree somewhat, or disagree strongly with the following [STATEMENT]?

- a. The war in Gaza shows that the best way forward is peace between Israel and a Palestinian state.
- b. The war in Gaza shows that Arab states should be open to taking some Palestinians from Gaza on a temporary basis as long as they can return someday.
- c. The war in Gaza shows that Iran's strategy to use armed groups to attack its enemies in the Middle East has been a failure.
- d. The war in Gaza shows that Palestinian armed conflict against Israel hurts the Palestinian cause for statehood.

NOTES

- 1 “Vision 2030,” Kingdom of Saudi Arabia, <https://www.vision2030.gov.sa/en>.
- 2 Trend data on this issue is missing from 2023 and 2024. Therefore, although belief in the importance of relations with different countries tends to rise or shrink gradually, these attitudes may have fluctuated more during this period, especially given the highly visible U.S. role in the Hamas-Israel war.
- 3 According to Saudi census data, the country’s youth bulge peaks in the 5–9 age group, demonstrating the developing role of youth public opinion in Saudi Arabia over the next decade.
- 4 The Mecca/Jeddah region also has the only concentration of those viewing U.S. policies as “very positive”; a little under a quarter (22%) express this view. Margin of error is higher in these subsamples, up to 8% (Mecca/Jeddah n=220, Eastern Province n=161, urban n=820, rural n=180). These effects are not observed for attitudes toward China and Russia.
- 5 Catherine Cleveland and David Pollock, “New Poll Sheds Light on Saudi Views of Israel-Hamas War,” *Fikra Forum*, Washington Institute for Near East Policy, December 21, 2023, <https://www.washingtoninstitute.org/policy-analysis/new-poll-sheds-light-saudi-views-israel-hamas-war>.
- 6 “Saudi Arabia Declares Muslim Brotherhood ‘Terrorist Group,’” BBC, March 7, 2014, <https://www.bbc.com/news/world-middle-east-26487092>.
- 7 While this framing was maintained for continuity and parity with questions on the Palestinian questionnaire, not all respondents may recognize what is included in the 1967 borders. But they are expected to understand the meaning of a “permanent, two-state solution.”
- 8 Referred to (in translation from the Arabic) as the “Abrahamic Peace Agreements Between Israel, the Emirates, Bahrain, Morocco, and Sudan” to ensure clarity for respondents. Note that the Israel-Morocco agreement has been treated in some formulations as a “separate but parallel” agreement to the Abraham Accords, but here, to match survey questioning, it is regarded as part of the Accords.
- 9 Al-Haram al-Sharif is known to Jews as the Temple Mount.
- 10 When this was phrased as an agree/disagree statement in the August 2023 poll—“The restoration of diplomatic and other ties between Arab Gulf countries and Iran is having a positive impact on our region”—the proportion who agreed largely matched the proportion who responded in other polls that it was a positive development: 36%.
- 11 See Muhammad bin Salman interview with *60 Minutes*, CBS News, “Saudi Crown Prince Says Iran’s Ayatollah Khamenei Is ‘Very Much Like Hitler,’” March 15, 2018, <https://www.cbsnews.com/news/saudi-crown-prince-says-irans-ayatollah-khamenei-is-very-much-like-hitler/>. See also MbS interview with Fox News in 2023, “Mohammed bin Salman: We Aren’t Proud of All of Our Laws in Saudi,” Fox News, September 20, 2023, <https://www.foxnews.com/video/6337519179112>.
- 12 This survey was fielded in July 2022, shortly after the Biden administration renewed nuclear talks with Iran in Doha (on June 28). The talks had stalled in April.
- 13 “Crown Prince Mohammed bin Salman Interview with Saudi Journalist Abdullah Al-Mudaifer,” *Arab News*, April 28, 2021, <https://www.arabnews.com/node/1850146/media>.
- 14 For multistory apartment buildings, a maximum of two interviews per building were conducted.
- 15 For further reading on sampling and survey design in the Saudi context, see Mona Shahab et al., “The Saudi National Mental Health Survey: Methodological and Logistical Challenges from the Pilot Study,” *International Journal of Methods in Psychiatric Research* 26, no. 3 (2017), <https://pmc.ncbi.nlm.nih.gov/articles/PMC5687073/>. See also Zeina N. Mneimneh et al., “The Saudi National Mental Health Survey: Sample Design and Weight Development,” *International Journal of Methods in Psychiatric Research* 29, no. 3 (2020), <https://onlinelibrary.wiley.com/doi/full/10.1002/mp.1829>.
- 16 For recent research on this issue in the American context, see Andrew Mercer and Arnold Lau, “Comparing Two Types of Online Survey Samples,” Pew Research Center, September 7, 2023, <https://www.pewresearch.org/methods/2023/09/07/comparing-two-types-of-online-survey-samples/>. See also Andrew Mercer et al., “Online Opt-In Polls Can Produce Misleading Results, Especially for Young People and Hispanic Adults,” Pew Research Center, March 5, 2024, <https://www.pewresearch.org/short-reads/2024/03/05/online-opt-in-polls-can-produce-misleading-results-especially-for-young-people-and-hispanic-adults/>.
- 17 Saudi General Authority for Statistics, “Population Estimates Publication 2024,” <https://www.stats.gov.sa/documents/20117/2435273/Population+Estimates+Statistics+2024+EN.pdf/9b71e303-5fd9-19cb-9913-850a9d521639?t=1738859947691>.

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