
Konrad Adenauer Program for Jewish-Arab Cooperation

December 12, 2024

In-Depth Survey of the Arab Public after a Year of War

65.8% report that their sense of personal security is currently weak, primarily due to the rise in violence in Arab communities but also because of the ongoing war • 65.1% report that their economic situation is relatively good • 57.8% believe that the war has created a sense of shared destiny between Arabs and Jews in Israel • 48.7% believe that the two-state solution is the most realistic resolution to the Israeli-Palestinian conflict • 53.4% think that a normalization agreement between Israel and Saudi Arabia would be a positive development in the region • 71.8% support the inclusion of an Arab party in the coalition to be formed after the next Knesset elections

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Main Findings

- A majority of the Arab public (65.8%) report that their sense of personal security is weak. The primary reason reported is the incidence of violence in Arab communities (63.1%), though the ongoing war also plays a role (24.6%). At the same time, 65.1% of respondents report that their economic situation is relatively good, and 57.8% believe that the war has created a sense of shared destiny between Arabs and Jews in Israel.
- A significant portion of the Arab public (39.4%) report that their sense of belonging to the state has weakened as a result of the war. On the other hand, a similar proportion (42.3%) state that the war did not affect their feelings toward the state, while only 17.4% say that the war strengthened their sense of belonging to the state.
- Opinions within the Arab public are divided regarding who should manage Gaza's affairs after the war: 20.7% believe it should be the Palestinian Authority, 20.1% support an international coalition, 17.9% suggest Israel, and 15.8% favor local Gazan entities. Only 6.7% think Hamas should continue governing Gaza after the war.
- Half of the Arab public (48.7%) believe that the most realistic solution to the Israeli-Palestinian conflict is a two-state solution based on the 1967 borders. Others are divided between those who see no solution in sight (27.1%) and those who support a one-state solution, i.e. a state shared by Israelis and Palestinians, from the river to the sea (21.7%).
- A majority of the Arab public (61.9%) believe that reconciliation and an end to the conflict between Israel and the Palestinians are not on the horizon. On the other hand, a quarter of respondents (26.5%) believe reconciliation and a resolution might be achieved within the next 10 years.

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- Half of the respondents (53.4%) think that a normalization agreement between Israel and Saudi Arabia might be a positive development in the region. At the same time, half (49.2%) believe that resolving the Israeli-Palestinian conflict should not be a precondition for such an agreement.
- A large majority of respondents (71.8%) support the inclusion of an Arab party in the government formed after the next elections. Half of the Arab public (47.8%) support joining any coalition, not just a center-left coalition.
- If elections for the Knesset were held today, the expected voter turnout in the Arab community would be 53.3%, similar to the turnout observed in the 25th Knesset elections (53.2%) held in November 2022. In this scenario, Hadash-Ta'al and Ra'am are expected to secure 5 and 4 seats, respectively, while Balad is not expected to pass the electoral threshold.
- The war has not changed the priorities of the Arab public. At the top of the agenda is the issue of violence and crime (66.5%), overshadowing other issues such as resolving the Palestinian problem (10.9%) and the regulation of planning and construction in Arab communities (10.7%).
- With respect to the personal identity of Arab citizens, three dominant components emerge: Israeli citizenship (33.9%), religious affiliation (29.2%), and Arab identity (26.9%). For a smaller segment of respondents (9%), Palestinian identity is the dominant component of their identity.

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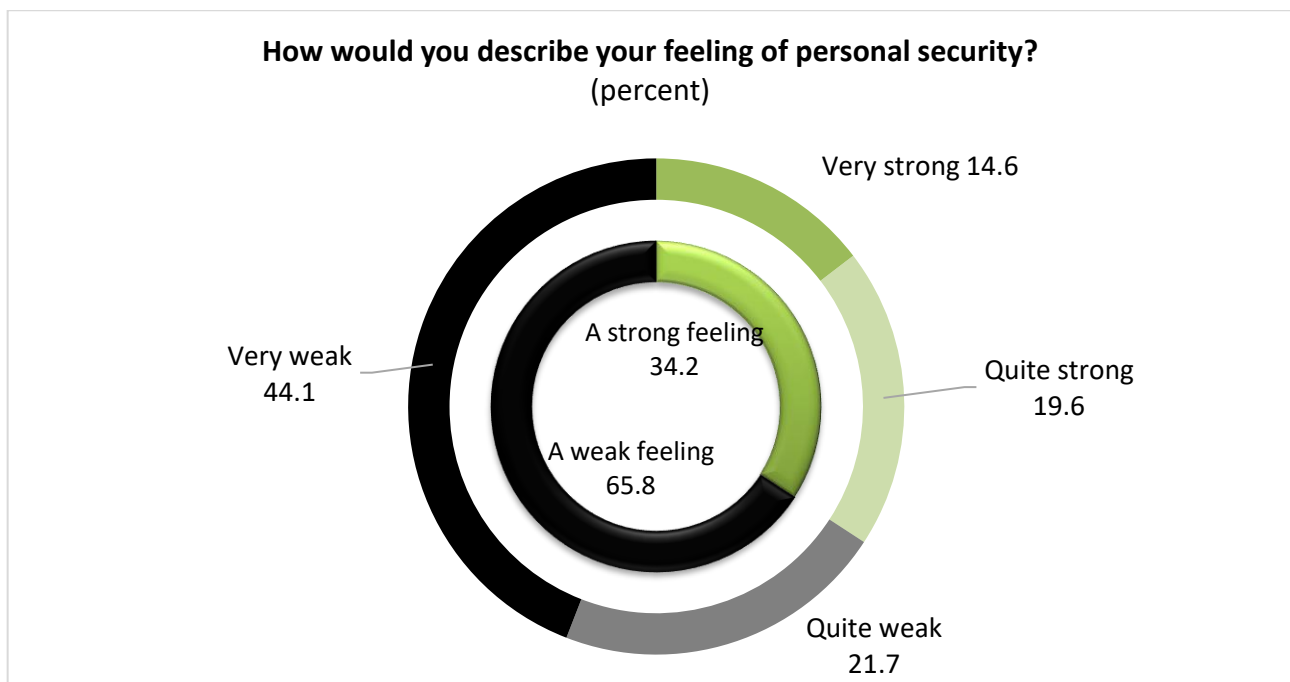
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Perceptions among the Arab public in the shadow of the war

Most survey participants (65.8%) report that their current sense of personal security is weak, with a significant portion (44.1%) stating that it is very weak. The primary factor negatively affecting the personal security or mood of Arab citizens is the incidence of violence in Arab communities (63.1%). Another significant factor is the ongoing war (24.6%). Other less significant factors include economic hardship (6.9%), tensions with Jewish citizens (3.4%), and family or personal issues (2%).

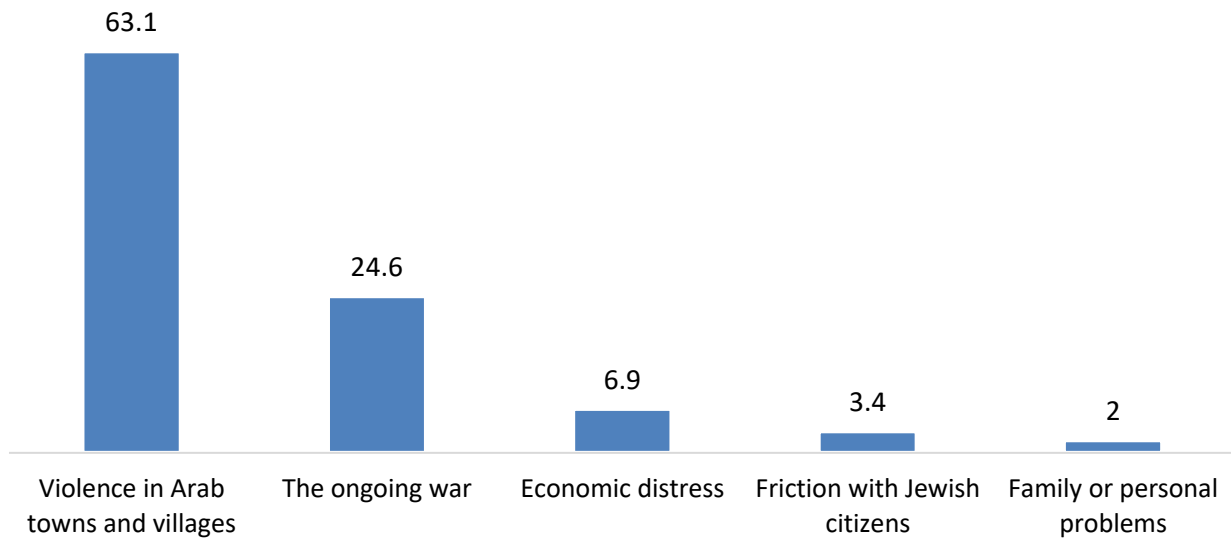
In a survey conducted shortly after the outbreak of the war (November 2023), 81.1% of respondents stated that their sense of personal security was adversely affected by the war. In a June 2024 survey, 74% of participants reported feeling less secure. The current survey offers some encouragement, suggesting a clear decline in levels of fear among the Arab public over the past year, despite the ongoing war. However, while Arab citizens seem to have adapted to the impact of the war, they appear unable to endure the consequences of crime and violence in their communities. The issue has been especially relevant this year with 216 murders (as of the end of November 2024).

Economically, life in the shadow of the war appears to have been relatively stable over the past year. In a November 2023 survey, a majority of respondents (64.9%) reported that their economic situation had been negatively impacted by the outbreak of the war. In the current survey, conducted a year into the war, most participants (65.1%) indicated that their economic situation is relatively good. A similar figure (67.8%) was reported in a survey conducted by the Konrad Adenauer Program in June of this year.

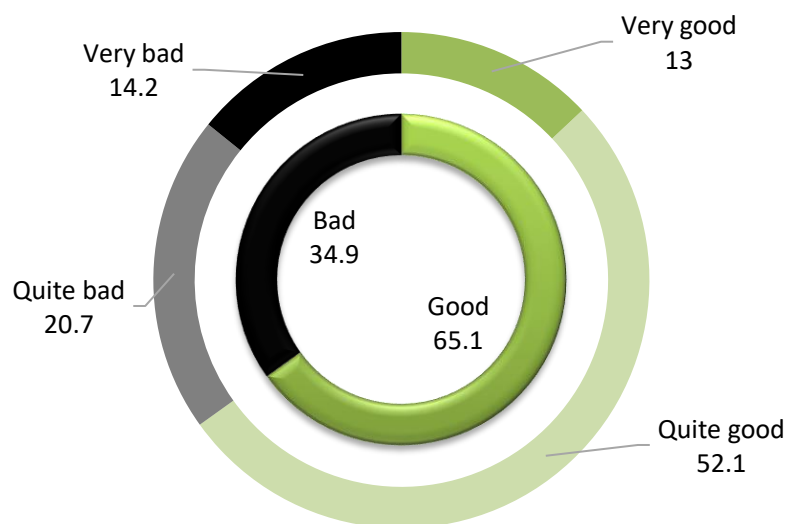


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What factor is adversely affecting your feeling of personal security or mood?
(percent)



What is your economic situation?
(percent)

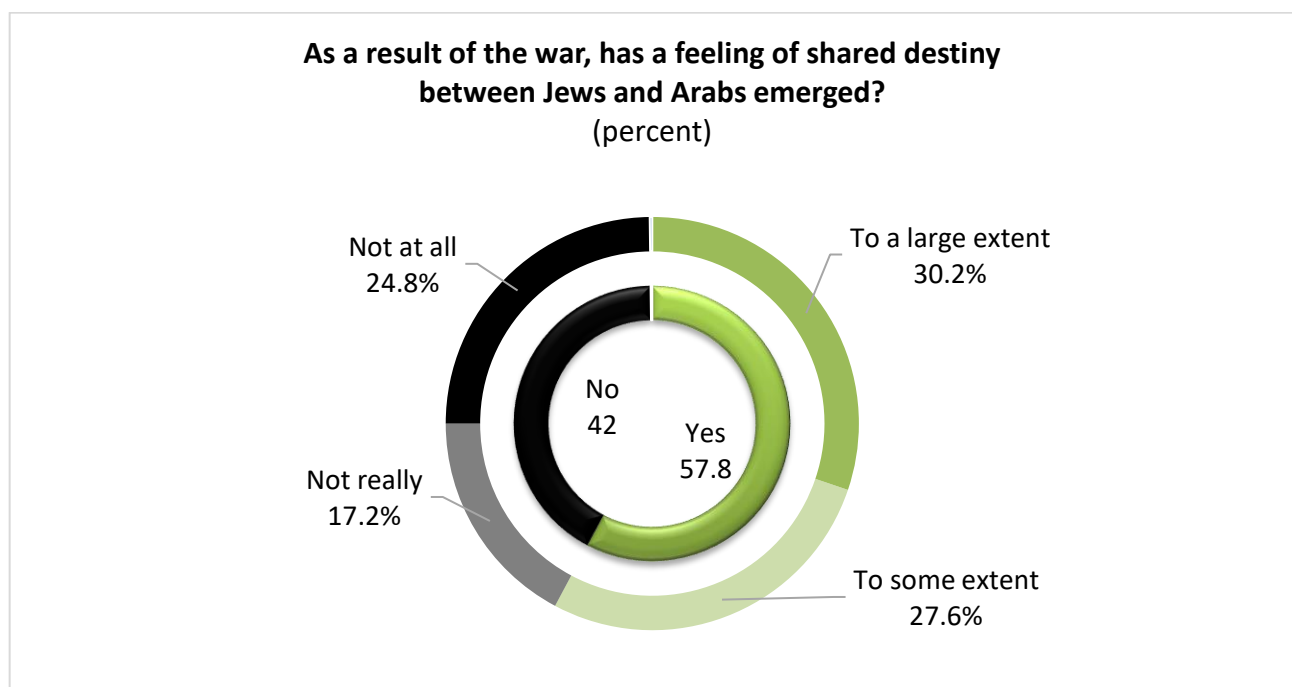


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The relations between Arabs and Jews and the feeling of belonging to the state

Relations between Arabs and Jews within Israel are influenced by the Israeli-Palestinian conflict and are tested whenever a violent round of conflict erupts between Israel and the Palestinians. In the early days of the war, tensions prevailed between the two groups. This was reflected in the findings of a survey conducted by the Konrad Adenauer Program in November 2023, in which a majority of the Arab public (69.8%) believed that the war had weakened solidarity between Arabs and Jews.

The current survey presents the opposite picture. A majority of the Arab public (57.8%) feel that over the past year, in the shadow of the war, a sense of shared destiny between Arabs and Jews has emerged. Conversely, 42% do not feel this way. Comparing the findings of the current survey with those of the previous one conducted in June reveals a positive trend on this question, as the proportion of those who then believed that a sense of shared Arab-Jewish destiny had developed stood at only 51.6%. The current survey result represents a statistically significant increase in this metric.

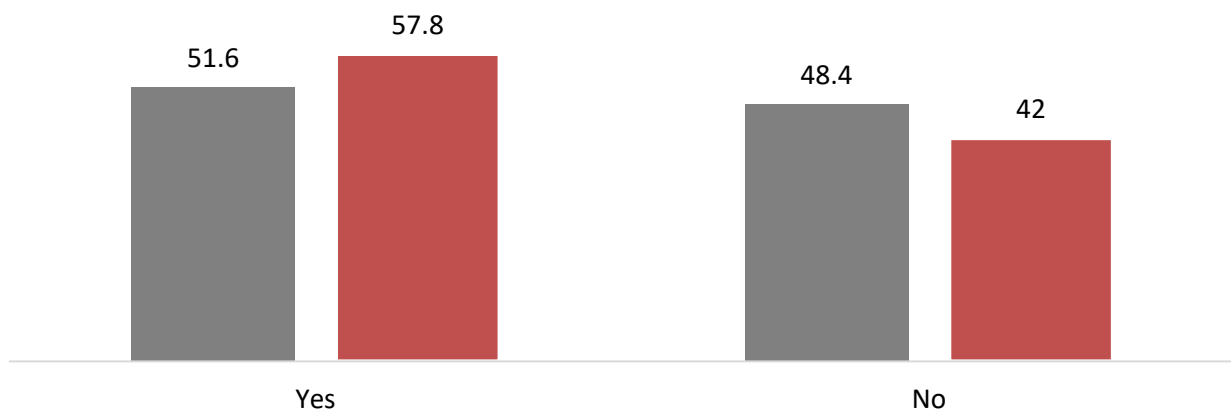


An examination of the responses based on voting patterns in the most recent Knesset elections shows that an overwhelming majority of those voting for Jewish parties (82.2%) believe that the war created a sense of shared destiny between Arabs and Jews in Israel. Among voters for Arab parties, a more interesting picture emerges. Hadash-Ta'al voters (63.2%) hold this view more than Balad voters (58.6%) and Ra'am voters (52.0%). Hadash voters advocate Arab-Jewish political cooperation, and therefore it is not surprising that they feel the sense of partnership has strengthened over the past year. The surprising finding is that Ra'am voters, who are more supportive than others of Arab integration into the government, hold the most skeptical view on this matter.

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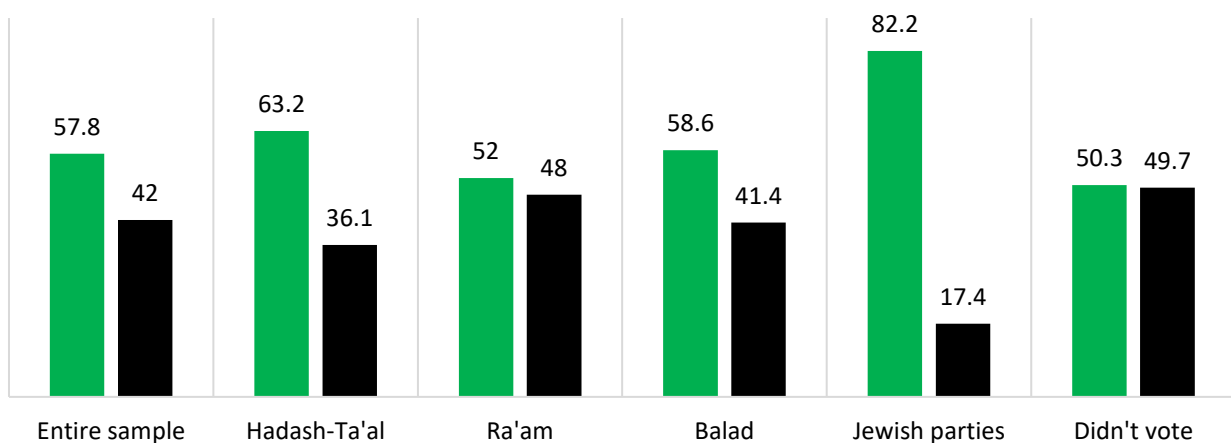
As a result of the war, has a feeling of shared destiny
 between Jews and Arabs emerged?
 (percent)

■ Jun-24 ■ Dec-24



As a result of the war, has a feeling of shared destiny
 between and Arabs and Jews in Israel emerged?
 (by voting patterns in the 25th Knesset elections, percent)

■ Yes ■ No

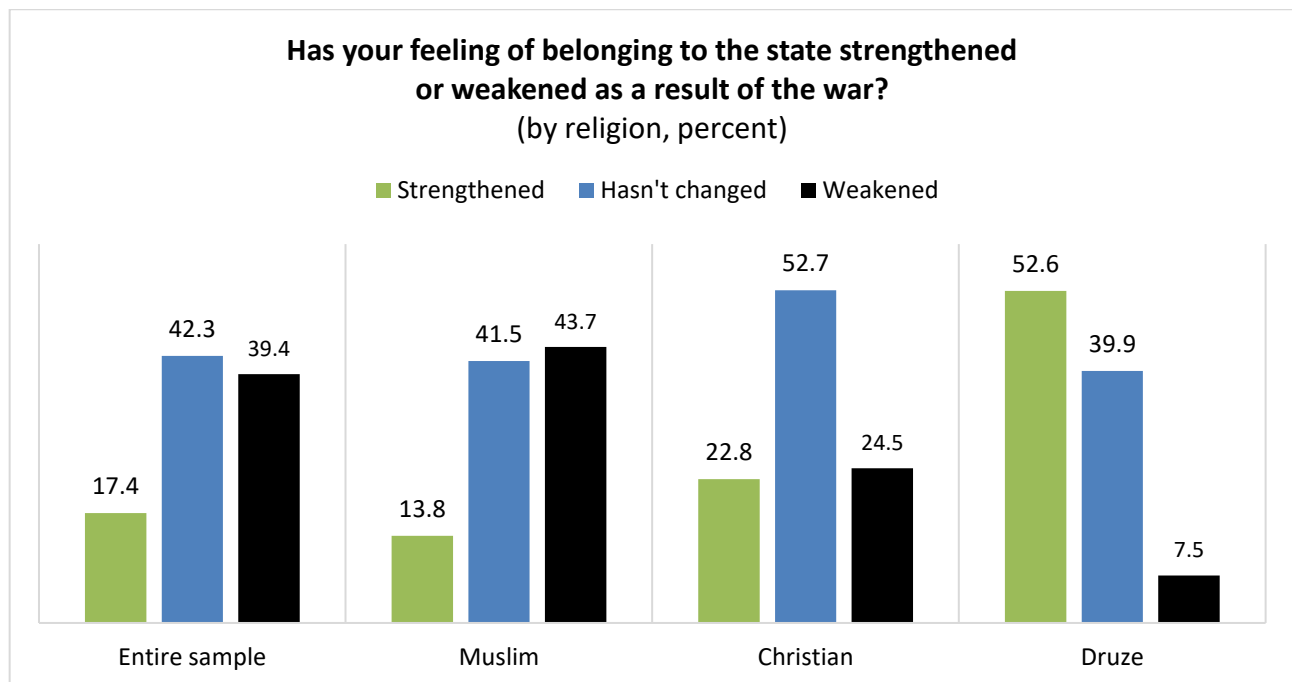


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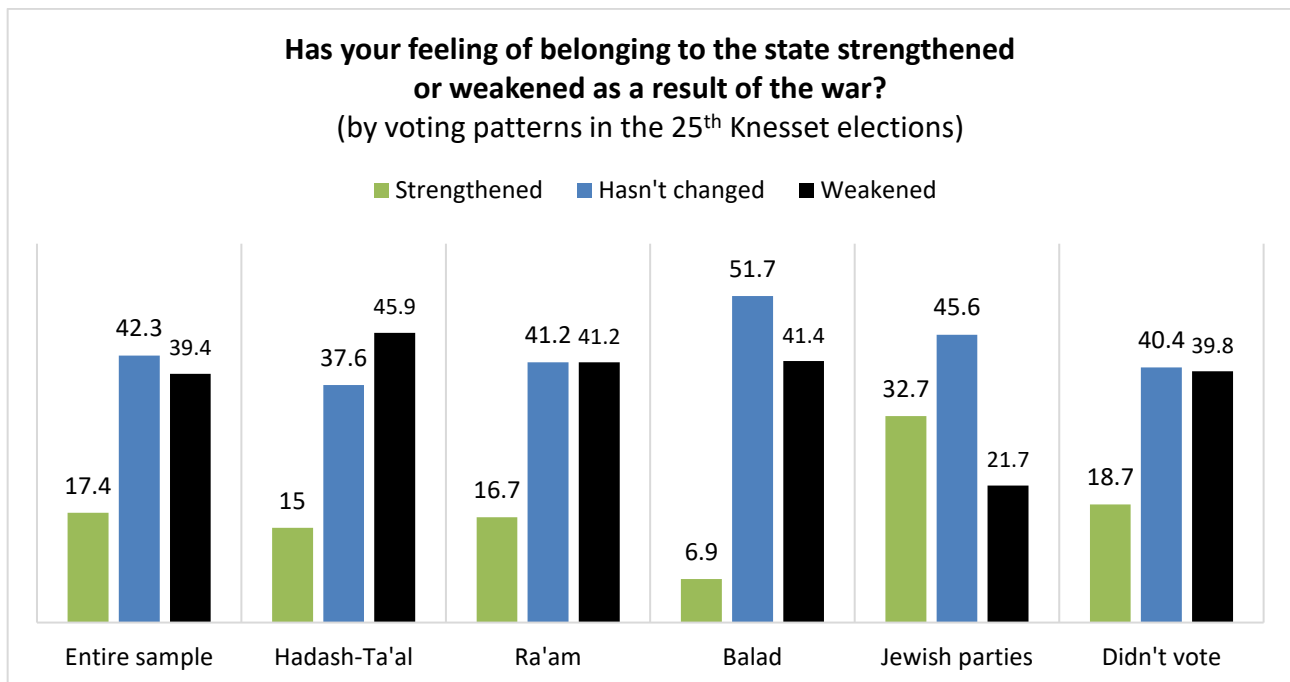
A different picture emerges with respect to the relationship between Arab citizens and the state. A significant proportion (39.4%) report that their sense of belonging to the state has weakened as a result of the war. A similar percentage (42.3%) indicate that the war has not changed their feelings about the state one way or the other. Only 17.4% of the survey participants stated that their sense of belonging to the state has actually strengthened over the past year due to the war.

The distribution of responses by religious affiliation shows that half of the Druze (52.6%) report that their sense of belonging to the state has strengthened, while only 7.5% feel that it has weakened. This finding is unsurprising given that many members of the Druze community are integrated into the security forces and have taken an active role in combat over the past year. On the other hand, it is striking that the proportion of Muslims who say their sense of belonging to the state has weakened (43.7%) is nearly double that of Christians who feel that way (24.5%).

The distribution of responses based on voting patterns in the most recent Knesset elections shows that among those voting for an Arab party, a relatively high percentage feel that their sense of belonging to the state has weakened. Among Hadash-Ta'al voters, this sentiment is slightly more dominant (though with statistical significance) than among Ra'am or Balad voters.



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The day after: Who should govern Gaza?

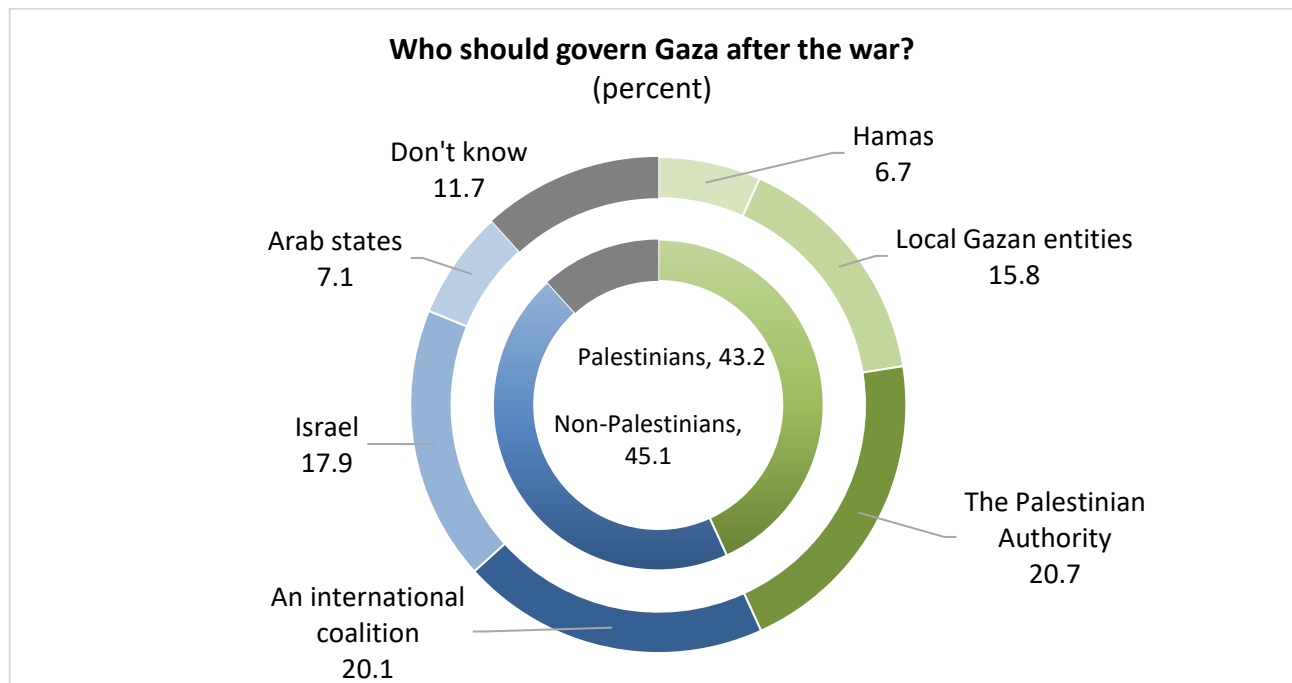
Opinions are divided among the Arab public on the question of who should govern the Gaza Strip after the war. 43.2% believe that Gaza should be placed in Palestinian hands. The preferred option is the Palestinian Authority (20.7%), followed by local Gazan entities (15.8%), and finally Hamas (6.7%). On the other hand, a similar percentage (45.1%) think that an external non-Palestinian entity should govern. The preferred option in this case is an international coalition (20.1%), followed by Israel (17.9%), and lastly the Arab states (7.1%).

The distribution of responses according to voting patterns reveals significant disagreement among those who voted for an Arab party. Overall, they agree that the management of Gaza's affairs after the war should be in Palestinian hands. However, the level of trust in the Palestinian Authority among Hadash-Ta'al voters and Ra'am voters (26.3% and 25.5%, respectively) is significantly higher than among Balad voters (13.8%). In contrast, Balad voters show markedly higher support for local Gazan entities (27.6%) than Hadash-Ta'al and Ra'am voters (13.5% and 20.6%, respectively). In any case, the level of trust in Hamas among all Arab voters of all Arab parties is very low: Hadash-Ta'al (8.3%), Balad (6.9%), and Ra'am (4.9%).

Jewish party voters express almost no trust in local Gazan entities (2.1%) or Hamas (0.8%). They believe that after the war Gaza should be entrusted to one of three entities: the Palestinian Authority (33.4%), an international coalition (27.8%), or Israel (25.5%).

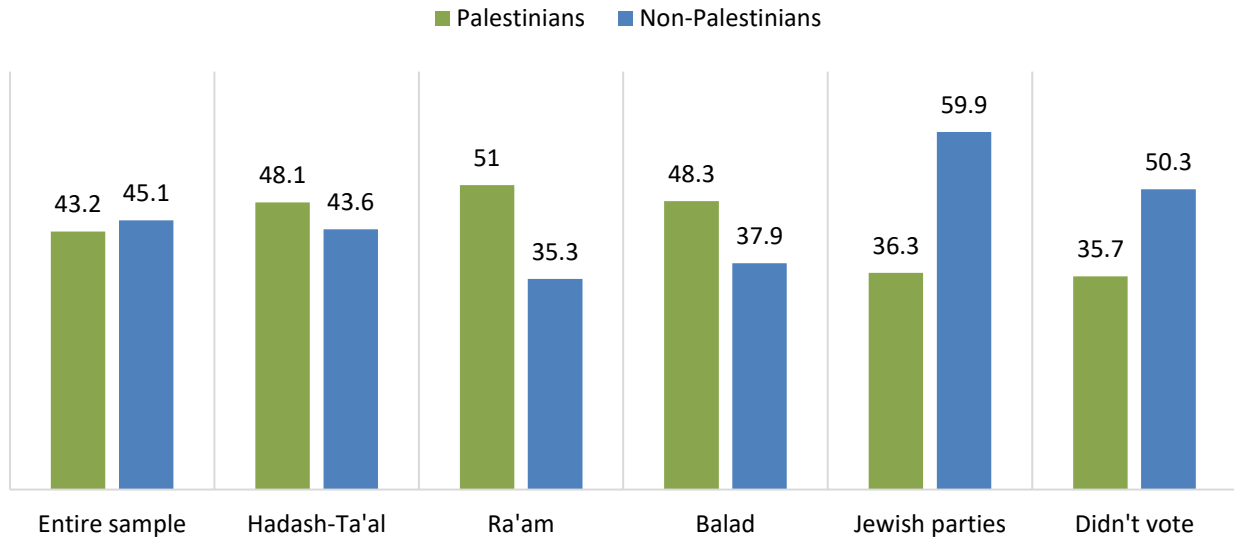
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Compared to findings from the previous survey conducted last June, it is evident that the trust of Arab citizens of Israel in the ability of local Palestinian entities or Hamas to govern in Gaza after the war has decreased significantly. On the other hand, a significantly higher percentage in the current survey than in the previous one believe that Israel should govern Gaza after the war. This should not necessarily be interpreted as support for or justification of post-war Israeli control of Gaza. It may reflect a combination of the hope for the war to end and the understanding that, under current political circumstances, the Israeli government is unlikely to withdraw its forces from Gaza even after the war concludes.

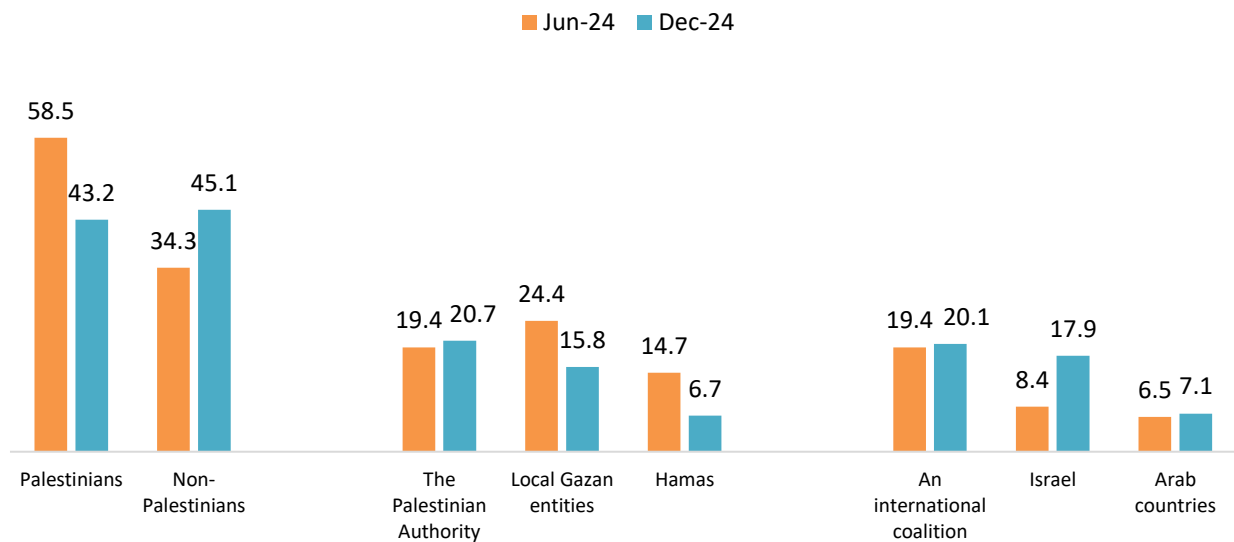


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Who should govern Gaza after the war?
(by voting patterns in the 25th Knesset elections, percent)



Who should govern Gaza after the war?
(percent)



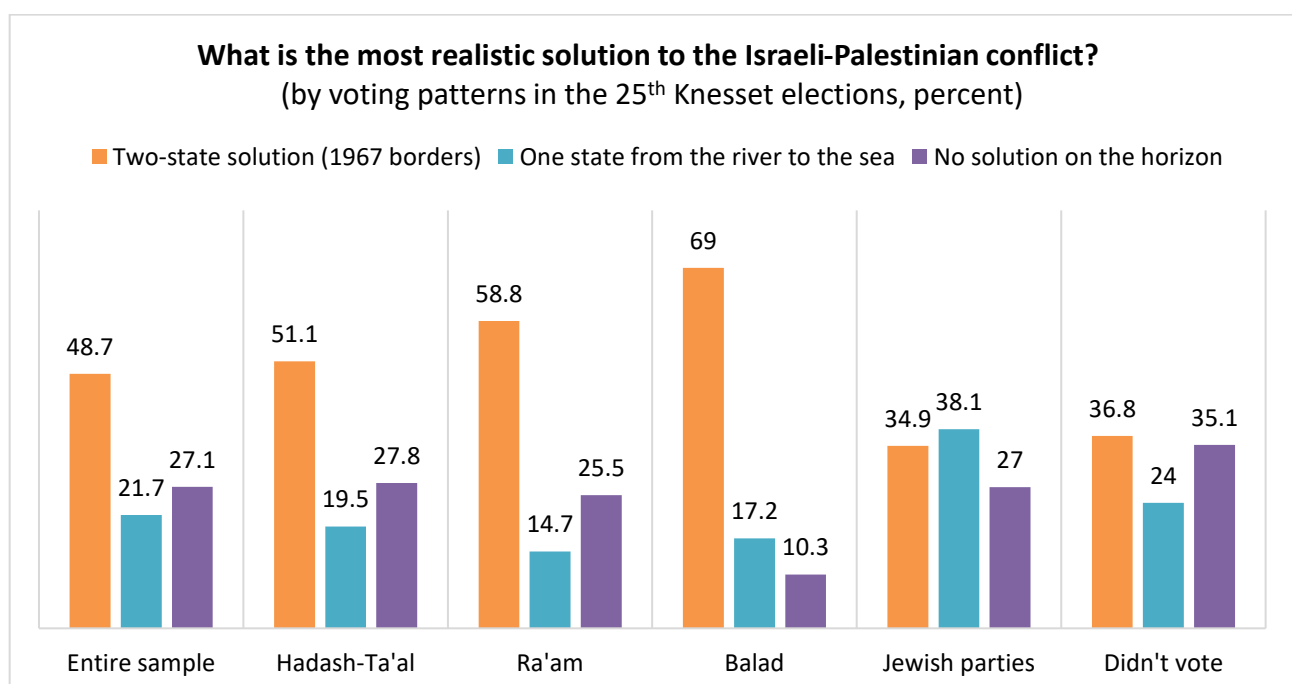
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The resolution of the Israeli-Palestinian conflict and the question of normalization between Israel and Saudi Arabia

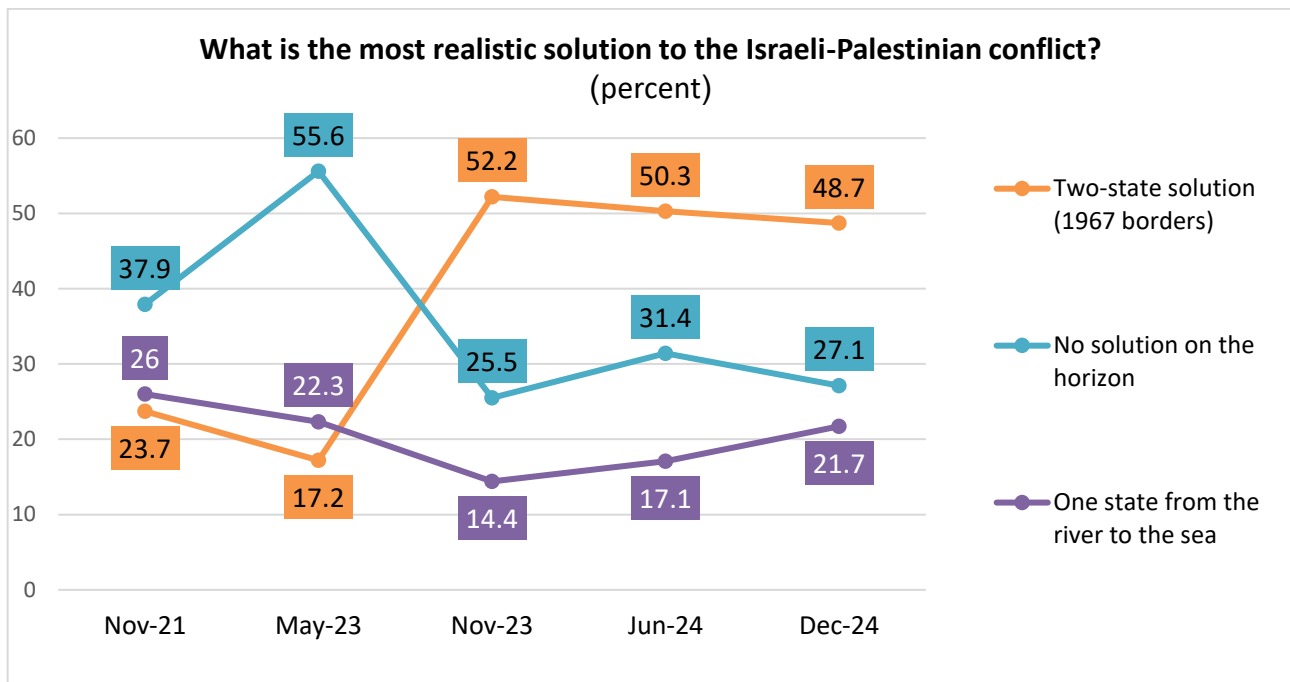
Half of the survey participants (48.7%) believe that the most realistic solution to the Israeli-Palestinian conflict is a two-state solution based on the 1967 borders. The rest are divided between those who think that there is no political solution in sight (27.1%) and those who believe that the most realistic solution is a single state, shared by Palestinians and Jews, stretching from the river to the sea (21.7%).

The distribution of responses based on voting patterns in the Knesset elections reveals that among those who voted for an Arab party, there is general agreement that a two-state solution based on the 1967 borders is the most realistic solution to the conflict. Balad voters support this solution at a significantly higher rate than Ra'am voters or Hadash-Ta'al voters: 69%, 58.8%, and 51.1%, respectively. In contrast, among voters for Jewish parties, opinions are divided on whether the most realistic solution is two states (34.9%) or one state (38.1%).

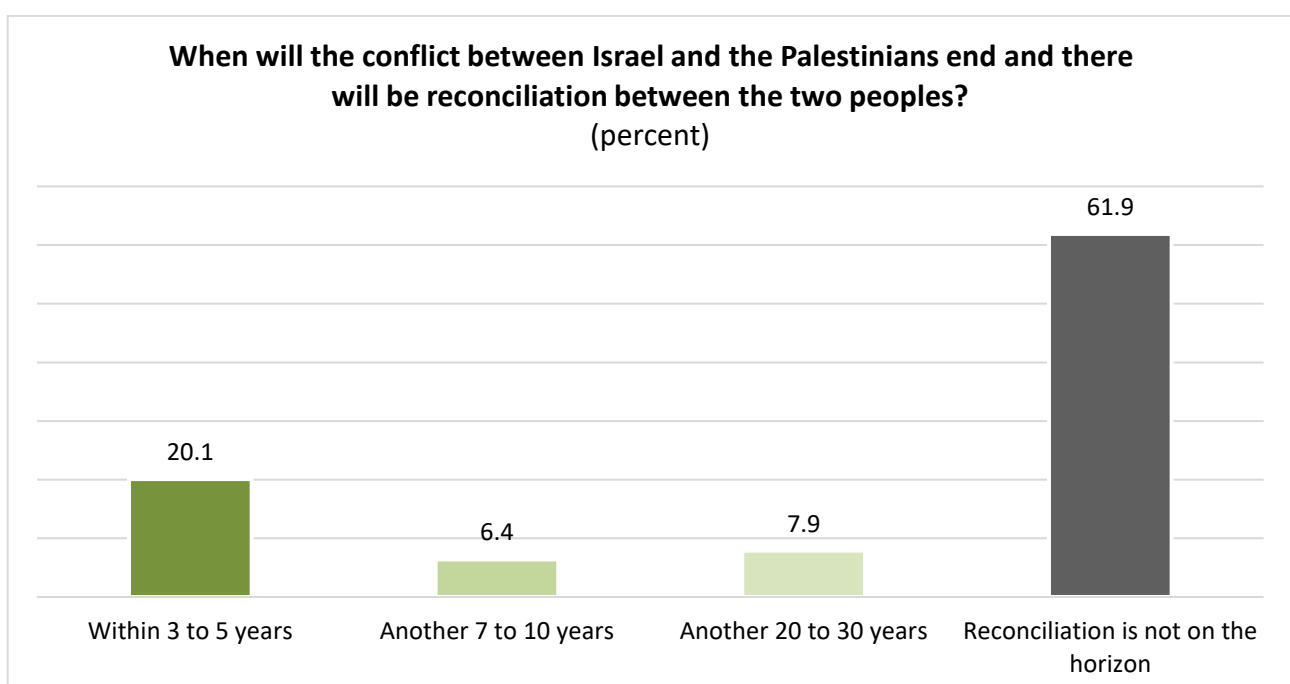
This question has in recent years been posed multiple times to the Arab public in surveys conducted by the Konrad Adenauer Program. Before the outbreak of the war on October 7, 2023, only a small portion of the Arab public believed that the most realistic solution is a two-state solution, while the majority thought there was no political solution in sight. Following the war, the two-state solution has become a more realistic option in the eyes of the Arab public compared to other alternatives. In the current survey (December 2024), there is a small—but statistically significant—increase in the proportion of those who believe that the most realistic solution is a single state. However, this group remains a minority within the Arab public.



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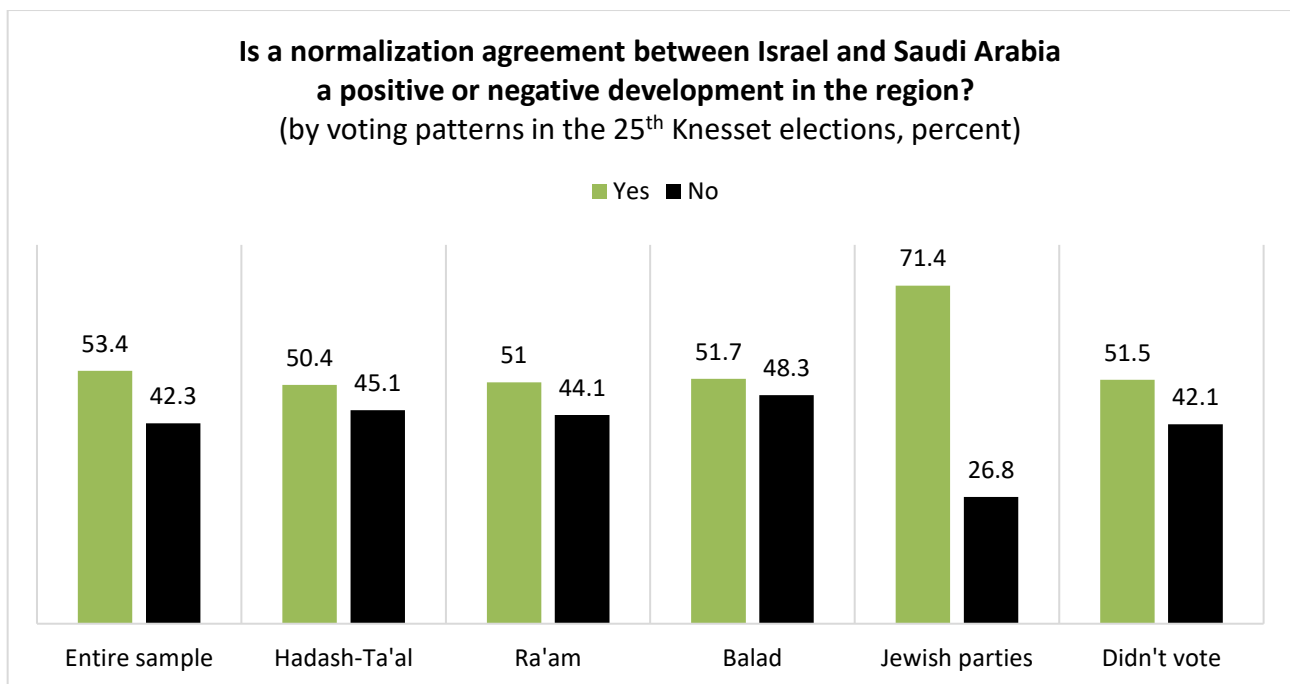
The survey participants were asked when they believe the conflict between Israel and the Palestinians will end and reconciliation between the two peoples will occur. A majority of the Arab public (61.9%) does not believe that reconciliation between the sides is on the horizon. In contrast, a quarter of the survey participants (26.5%) believe that the conflict's resolution and reconciliation between the peoples will be achieved within a decade: the majority of them (20.1%) think it will be achieved within five years at most, while 6.4% believe it will happen within 7 to 10 years. A small percentage (7.9%) think that reconciliation will be achieved within a generation (20–30 years).



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Regarding the future of the region, the survey participants were asked for their opinion regarding a potential normalization agreement between Israel and Saudi Arabia. Half of the Arab public (53.4%) believe that such an agreement might be a positive development in the region, while 42.3% do not see it as a positive development.

A significant majority among voters for Jewish parties (71.4%) believe that a normalization agreement between Israel and Saudi Arabia might be a positive development in the region, with half of them (46.8%) considering it a very positive development. Voters for Arab parties take a more cautious stance. While half of them view the agreement as generally positive, the proportion of Ra'am voters and Hadash-Ta'al voters who see it as very positive (29.4% and 21.1%, respectively) is significantly higher than the proportion of Balad voters who think so (10.3%). Conversely, the proportion of Balad voters who view it as a very negative development (37.9%) is notably higher than among Ra'am voters (28.4%) and Hadash-Ta'al voters (30.1%) who hold the same view.

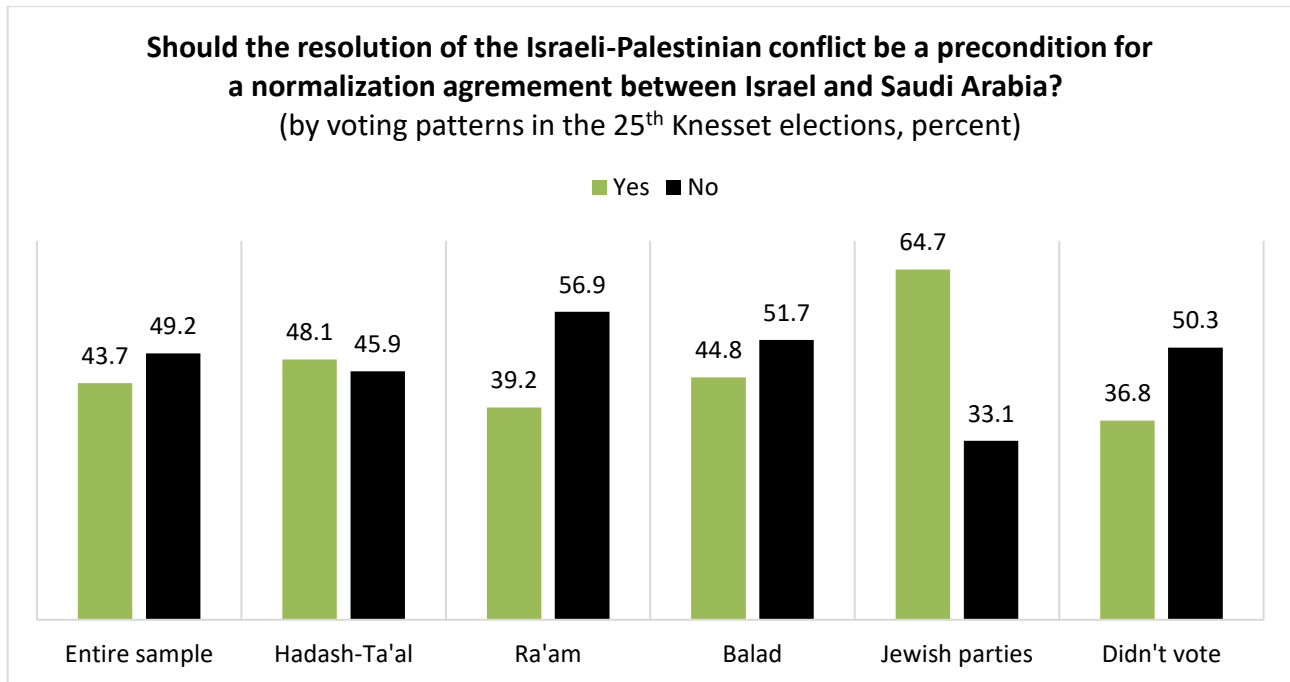


There was disagreement as to whether resolving the Israeli-Palestinian conflict should be a precondition for a normalization agreement between Israel and Saudi Arabia: half of the Arab public (49.2%) believes it should not be, while 43.7% think it should be. In other words, for half of the Arab public, there is no obstacle to advancing toward another normalization agreement between Israel and its Arab neighbors even if the Israeli-Palestinian conflict remains unresolved.

Among Arab party voters, Ra'am voters are more convinced than Balad and Hadash-Ta'al voters that a Saudi-Israeli normalization agreement should not be conditioned on first resolving the Israeli-Palestinian conflict: 56.9% vs 51.7% and 45.9%, respectively. Conversely, a majority of voters for a Jewish party (64.7%) are more convinced than voters for an Arab party that the Israeli-Palestinian

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conflict should first be resolved before moving forward with a normalization agreement between Israel and Saudi Arabia.



Voter turnout and joining the government

According to the survey findings, if Knesset elections were held today, the expected voter turnout among Arab voters would be 53.3%. Based on these findings and past trends in Arab voter behavior, it can be estimated that if the three Arab lists—Hadash-Ta'al, Ra'am, and Balad—were to run separately, as they did in the previous elections, Hadash-Ta'al and Ra'am would likely secure 5 and 4 seats, respectively, while Balad would not be expected to pass the electoral threshold.

Survey participants were then asked whether an Arab party should join the coalition formed after the next elections. A significant majority of the Arab public (71.8%) supports such a move. Half of the Arab public (47.8%) supports the participation of an Arab party in any coalition formed, not just a center-left coalition. In contrast, only 12.5% are strongly opposed to Arab parties joining the coalition or even supporting it externally through a "veto bloc" in the Knesset.

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Should an Arab party join the coalition that will be formed after the next elections?
(percent)

Yes, 71.8

Yes, they should join any coalition that is formed, **47.8**

Yes, but only a center-left coalition, **24.0**

No, 25.4

No, but an Arab party can support the coalition from the outside in exchange for real benefits for Arab society, **12.9**

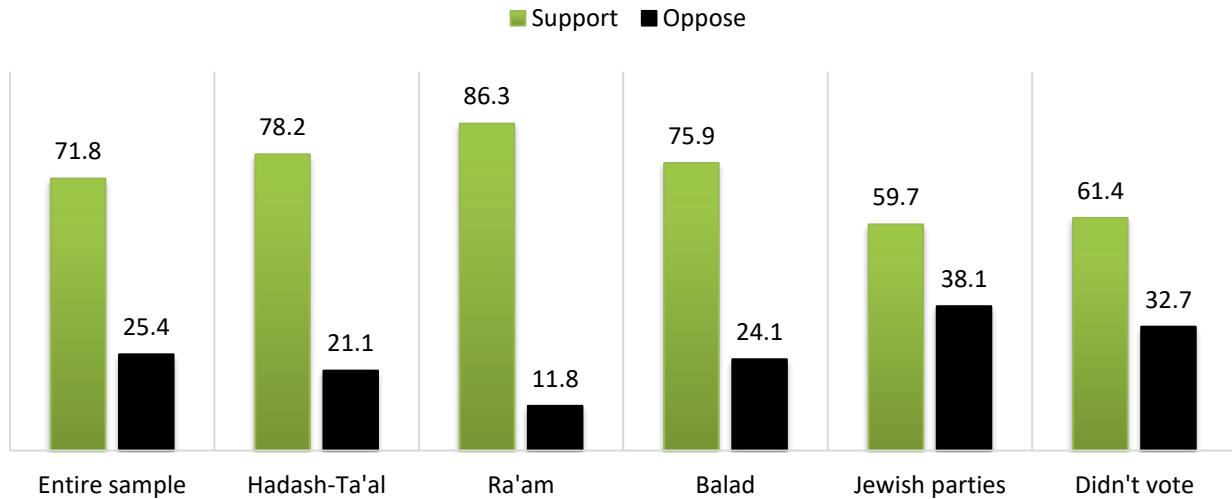
Under no circumstances should an Arab party join the coalition or support it from the outside, **12.5**

The highest level of support for the idea of an Arab party joining the coalition formed after the next elections was found among Ra'am voters (86.3%), followed by Hadash-Ta'al voters (78.2%) and Balad voters (75.9%). Surprisingly, however, Balad voters showed the highest level of support for an Arab party joining any coalition formed (62.1%), not just a center-left coalition. This proportion is significantly higher than that of Ra'am voters (53.9%) and Hadash-Ta'al voters (42.9%) who support such participation.

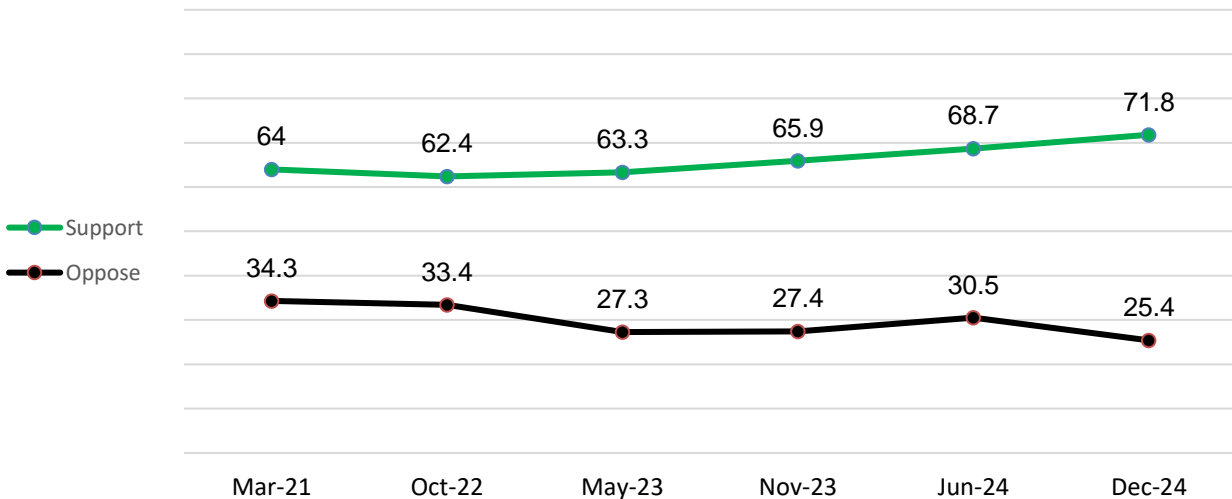
An analysis of trends based on surveys conducted by the Konrad Adenauer Program in recent years reveals that the current survey recorded the highest level of support among the Arab public in recent years for the inclusion of an Arab party in the coalition, as well as the lowest level of opposition to such a move. It appears that Ra'am's participation in the Bennett-Lapid government following the 2021 elections, which was considered a groundbreaking development in Arab politics at the time, has now become a broadly accepted norm among the overwhelming majority of the Arab public.

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The position of the Arab public as to whether an Arab party should join the coalition formed after the next Knesset elections
(by voting patterns in the 25th Knesset elections, percent)



The position of the Arab public as to whether an Arab party should join the coalition formed after the next Knesset elections
(selected years, percent)

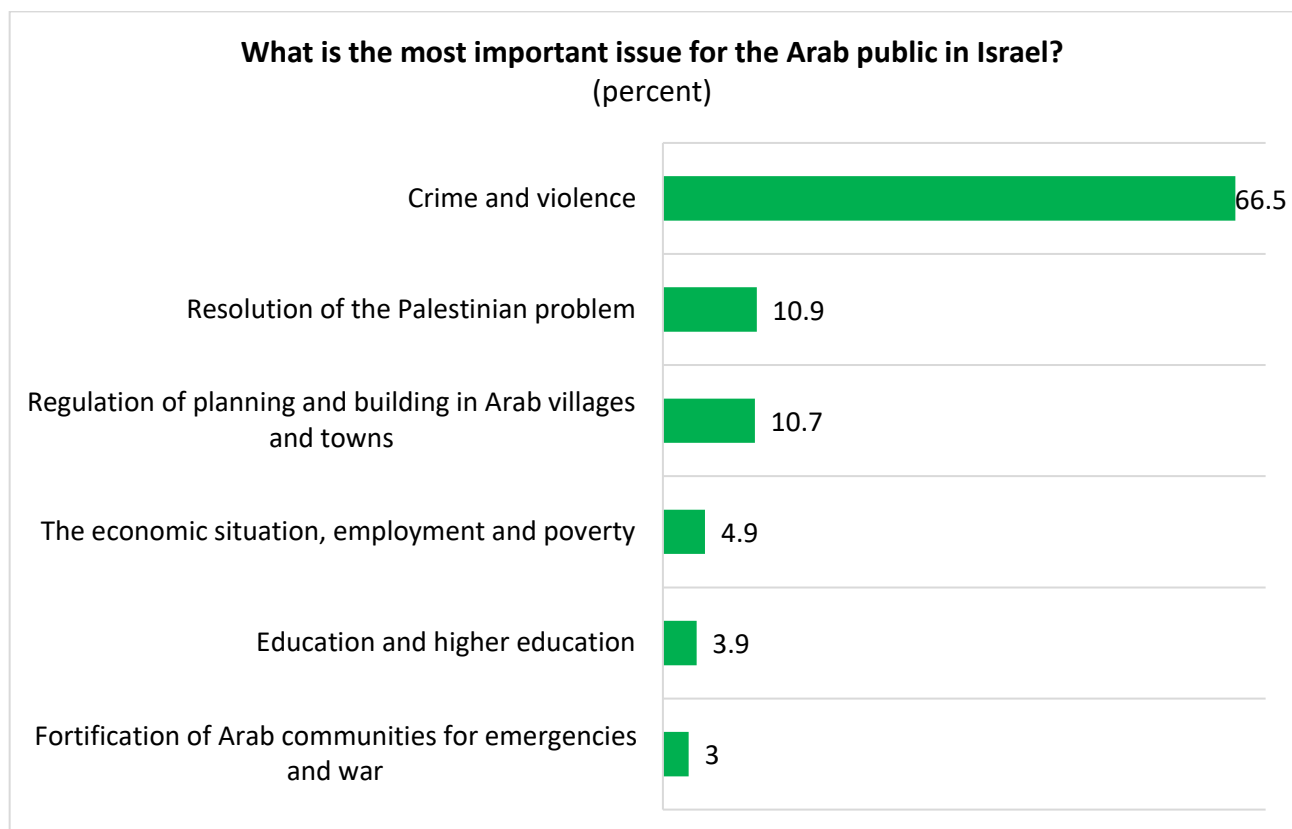


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The agenda of the Arab public

The ongoing war has not shifted the priorities of the Arab public. The issue of crime and violence remains firmly at the top of the agenda (66.5%), overshadowing all other issues: resolving the Palestinian problem (10.9%), regulating planning and construction in Arab communities (10.7%), the economic situation, employment, and poverty (4.9%), education and higher education (3.9%), and even preparing Arab communities for emergencies and war (3%).

Resolving the Palestinian issue is slightly more important for Balad voters (17.2%) and Hadash-Ta'al voters (15%) than for Ra'am voters (9.8%). Among voters for a Jewish party—mostly Druze residing in northern communities heavily affected by rocket fire from Lebanon during the war—the issue of fortifying Arab communities for emergencies and war is more important than the overall survey average (7.8% vs 3%, respectively).



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Personal Identity

According to the survey findings, the personal identity of Arab citizens is dominated by three key components: Israeli citizenship (33.9%), religious affiliation (29.2%), and Arab identity (26.9%). Only a small portion (9%) stated that Palestinian identity is the most important component for them.

It is worth noting that the Israeli component was presented to survey participants as "citizenship" rather than "identity." Nevertheless, it is evident that for a significant portion of Arab citizens, Israeli citizenship is the most important factor in defining their personal identity. Moreover, the survey found—perhaps as a result of the ongoing war—that Israeli (instrumental) citizenship is more important than Arab identity, which involves deeper meanings such as religion, nationalism, culture, tradition, language, and values.

A comparison of the current survey findings with those from surveys conducted by the Konrad Adenauer Program over the past two years reveals two interesting conclusions. First, the importance of Israeli citizenship has increased during the war, thus establishing a consistent trend. This might explain why many in the Arab public feel that the war has fostered a sense of shared destiny between Arabs and Jews in Israel.

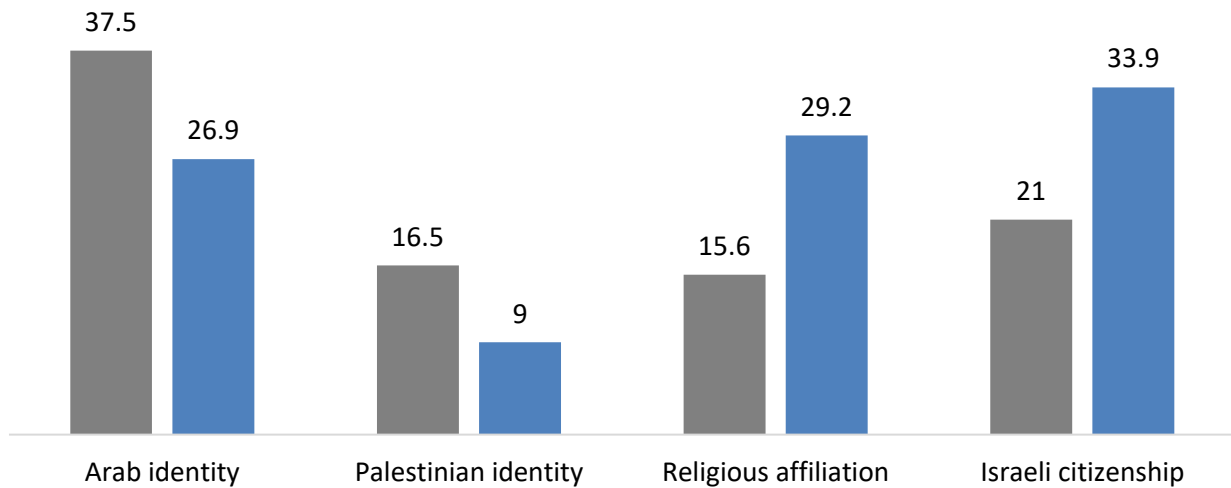
The second conclusion is that national identity components—the general Arab identity and the narrower Palestinian identity—have eroded significantly over the past two years. In a survey conducted in May 2023, these two components played a dominant role in defining the personal identity of Arab citizens in Israel (54% in total). However, in the current survey, the weight of the Israeli civic identity component is almost equal to the combined weight of the two national identity components. This finding illustrates how the Israeli-Palestinian conflict (the war in Gaza) and the Israeli-Arab conflict (the war in Lebanon) are influencing the personal identity definitions of Arab citizens in Israel.

It is worth noting that the Israeli citizenship component is particularly important among voters for a Jewish party, but it is also dominant among voters for an Arab party. Interestingly, the religious identity component is dominant not only among Ra'am voters (many of whom support the Islamic Movement), but also among Balad voters, who hold a more liberal and secular worldview. In contrast, the religious identity component is less significant for Hadash-Ta'al voters. On the other hand, and unsurprisingly, the Palestinian identity component is more important to Balad voters than to those voting for other Arab parties.

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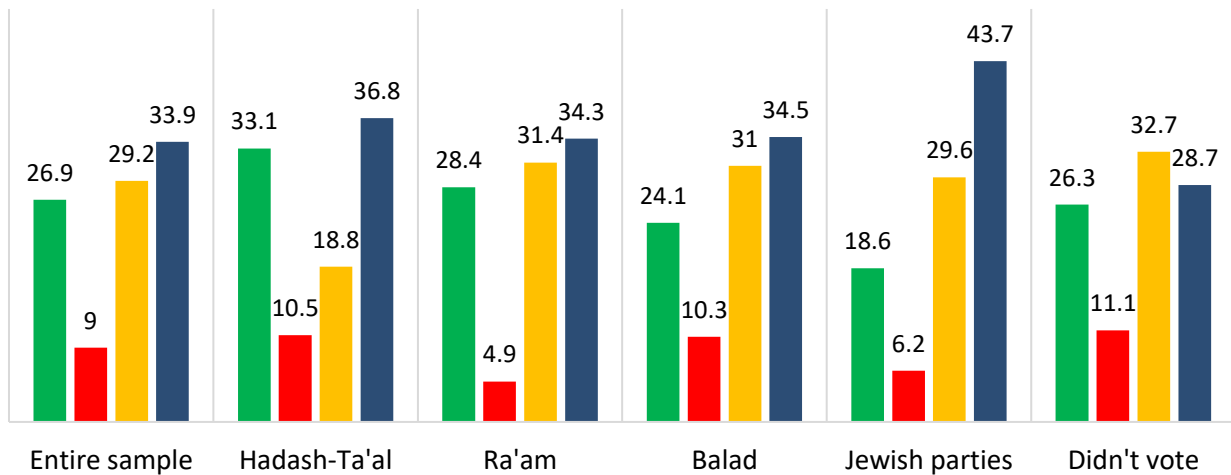
What is the most important component of your personal identity?
(percent)

■ May-23 ■ Dec-24



What is the most important component of your personal identity?
(by voting patterns in the 25th Knesset elections, percent)

■ Arab identity ■ Palestinian identity ■ Religious affiliation ■ Israeli citizenship



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The survey was initiated by the Konrad Adenauer Program for Jewish-Arab Cooperation at the Moshe Dayan Center for Middle Eastern and African Studies, Tel Aviv University, in cooperation with the Israel Office of the German Konrad-Adenauer-Stiftung.

The survey was carried out by the Stat-Net Research Institute under the direction of Yousef Makladeh.

The data were collected during the period December 1-8, 2024 in a telephone survey carried out in Arabic among a representative sample of the adult Arab population in Israel (aged 18+).

Size of the sample: 500. Sample error: ± 4.38 percent.