

**Second Annual  
ASDA'A Burson-Marsteller  
Arab Youth Survey**

**March 7, 2010**



# OBJECTIVES



The study was commissioned in October 2009 to focus on attitudes among Arab national and expatriate youth aged 18-24 in nine Middle East countries: the six countries of the Gulf Cooperation Council, Jordan, Lebanon and Egypt.

The research was designed to uncover attitudes by looking at issues including:

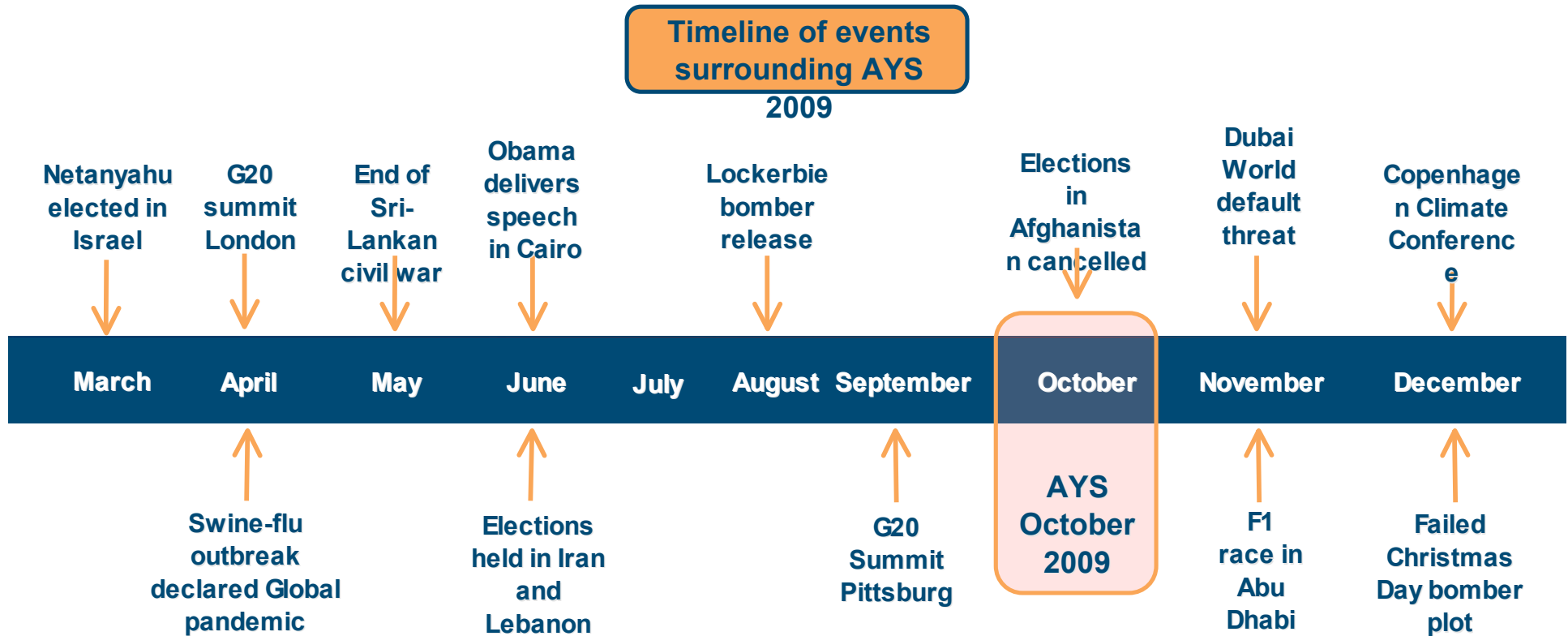
- Attitudes to the financial crisis
- Access to technology
- Media consumption trends
- Social media networking
- Attitudes to travel and foreign relations
- Use of leisure time
- Spending habits
- Perceptions of leading brands
- Attitudes towards education
- Perceptions of future careers



# OBJECTIVES



Below is a timeline of relevant events surrounding the survey to provide a context for the results:



# METHODOLOGY

Penn Schoen & Berland conducted 2,000 interviews face-to-face\* among respondents aged 18-24 in the following countries:

- Egypt (n=250)
  - Jordan (n=200)
  - Kuwait (n=200)
  - Qatar (n=200)
  - Saudi Arabia (n=300)
  - United Arab Emirates (n=300)
  - Lebanon (n=200)
  - Bahrain (n=150)
  - Oman (n=200)
- New markets**

The research held quotas on the following:

S.E.C -      **AB = 20%**    **C1 = 35%**    **C2 = 45%**

Gender -                      **Male 60%**    **Female 40%**

Specific city quotas for each market -

Arab nationals & expatriates

Nationals 100%	Nats 75% Expats 25%	Nats 50% Expats 50%
Egypt, Jordan, Lebanon, Oman, Bahrain	KSA, Kuwait	UAE, Qatar

UAE	Oman	Qatar	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon
Dubai – 40%	Muscat – 50%	Doha – 55%	Manama – 100%	Jeddah – 40%	Kuwait City -20%	Cairo – 50%	Amman – 50%	East Beirut – 40%
Sharjah – 20%	Batinah – 50%	Al Rayyan – 45%		Riyadh – 40%	Al Hawalli – 30th	Alexandria – 25%	Ibrid – 25%	West Beirut – 40%
Abu Dhabi – 40%				Dammam – 20%	Al Ahmadi – 20%	Mansoura – 25%	Zarqa – 25%	Tripoli – 20%
					Al Farwaniya – 30%			

\* 2008 research was conducted by Nielsen using a different methodology (online) from PSB's 2009 research

# RESEARCH HIGHLIGHTS



- 1 Attitudes to the financial crisis
- 2 General outlook
- 3 Access to technology
- 4 Media trends
- 5 Attitudes to brands
- 6 Leisure time
- 7 Spending and debt
- 8 Travel
- 9 International outlook
- 10 Future careers

# FINANCIAL CRISIS IMPACT

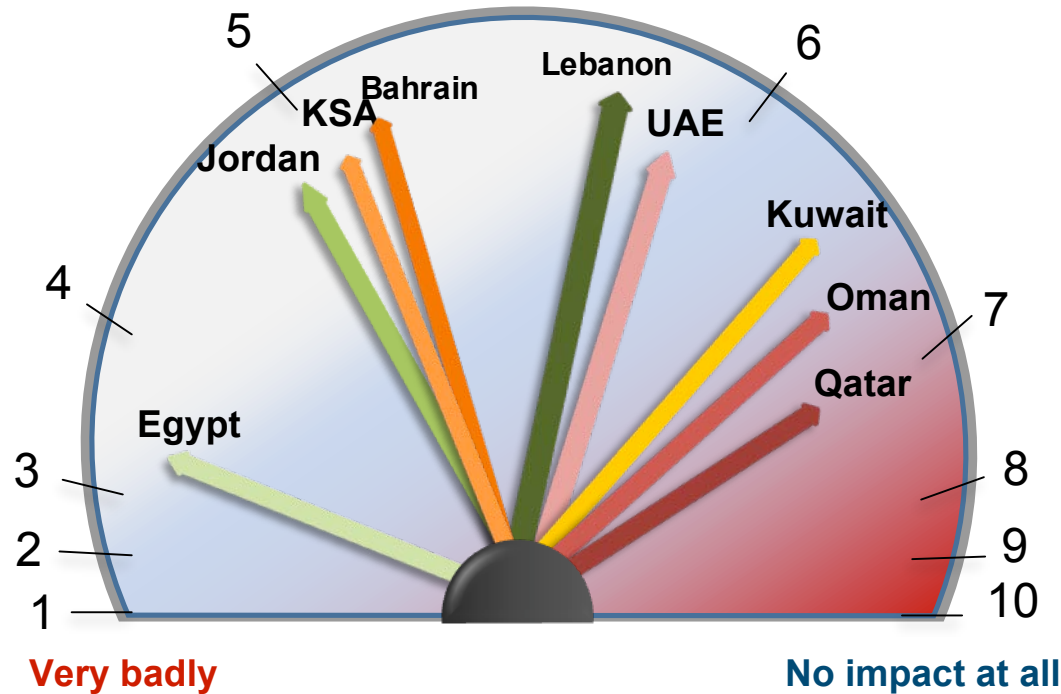
1



- The impact of the downturn varied from country to country.
- Youth in Egypt, Jordan, Saudi Arabia and Bahrain felt a more acute impact than those in Qatar, Oman and Kuwait.

On a scale of 1 to 10, how badly do you think your country has been impacted by the financial crisis?  
1 being very badly, 10 being no impact at all

*NB: Fieldwork conducted before Dubai World default threat of Nov '09*

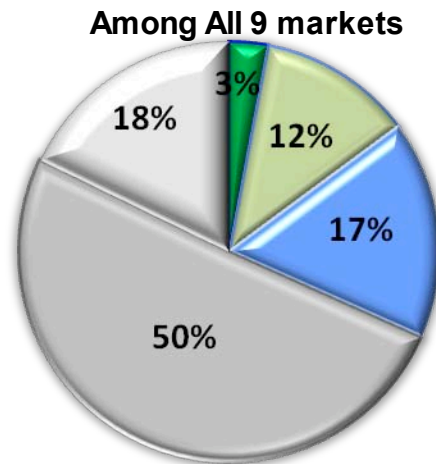


# FINANCIAL CRISIS IMPACT 1



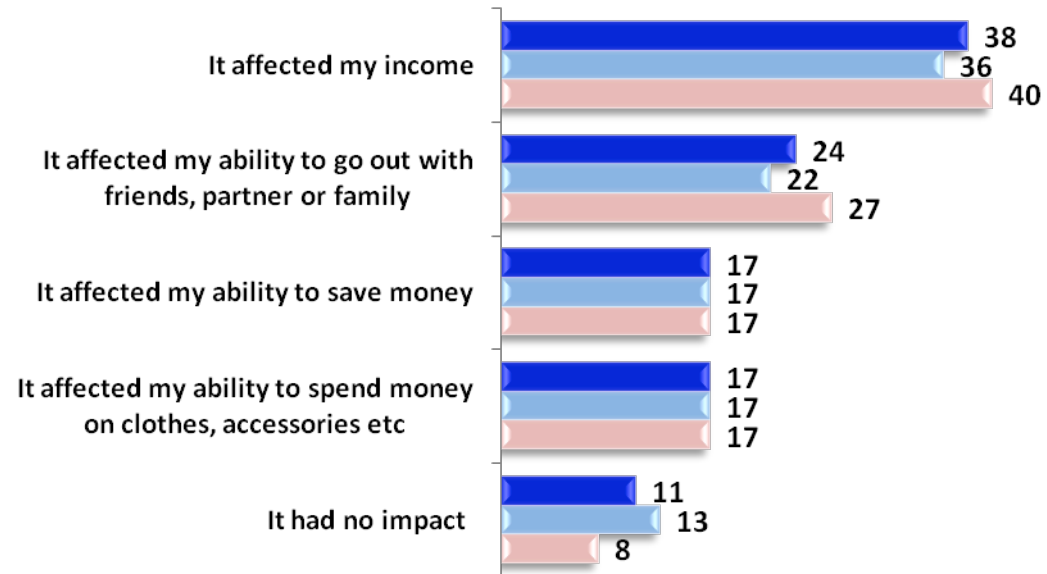
- Half of all respondents said neither they, their family, nor any of their friends had lost their job in the previous 12 months.
- But over a third said the crisis has affected their income, and nearly 1 in 4 said it has affected their ability to go out.

Which of the following is closest to your experience in the past 12 months?



- I have lost my job
- I know a family member who has lost their job
- I know a friend who has lost his/her job
- None of the above
- Don't know

How did the financial crisis and global recession impact you personally?

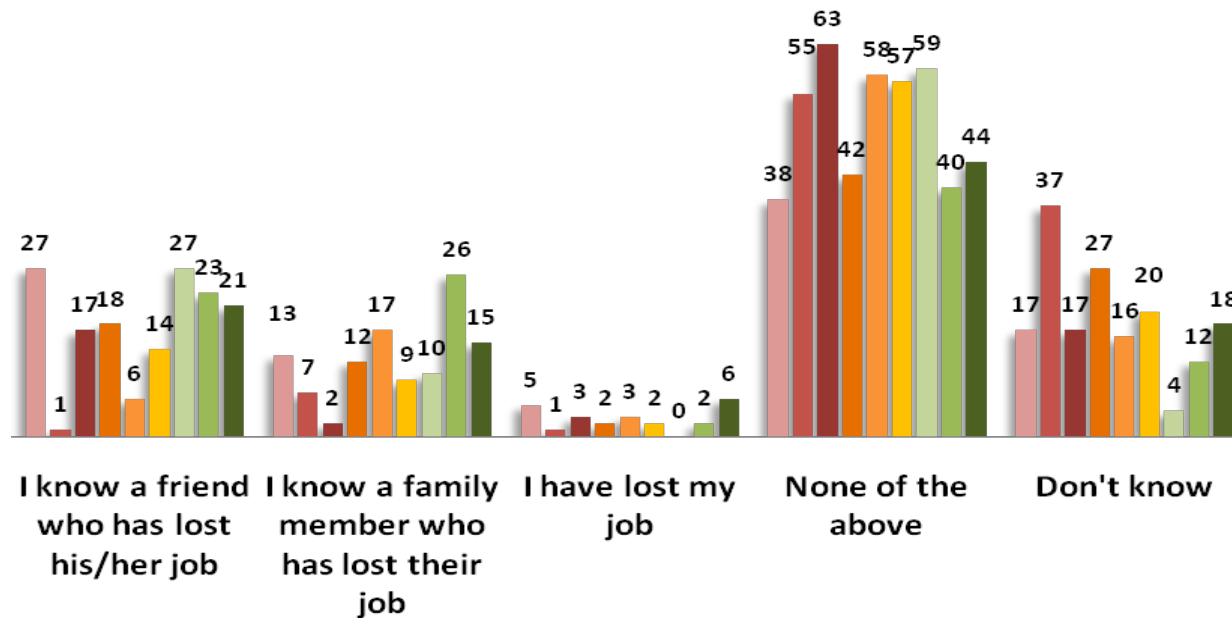


- Among all 9 markets
- Men
- Women

# FINANCIAL CRISIS IMPACT 1



- Youth in Qatar were the most upbeat, with 63 per cent saying they, their friends and family had been unscathed by redundancies.
- Only 38 per cent of youth in the UAE had the same view, the lowest percentage in the survey.



UAE
  Oman
  Qatar
  Bahrain
  KSA
  Kuwait
  Egypt
  Jordan
  Lebanon



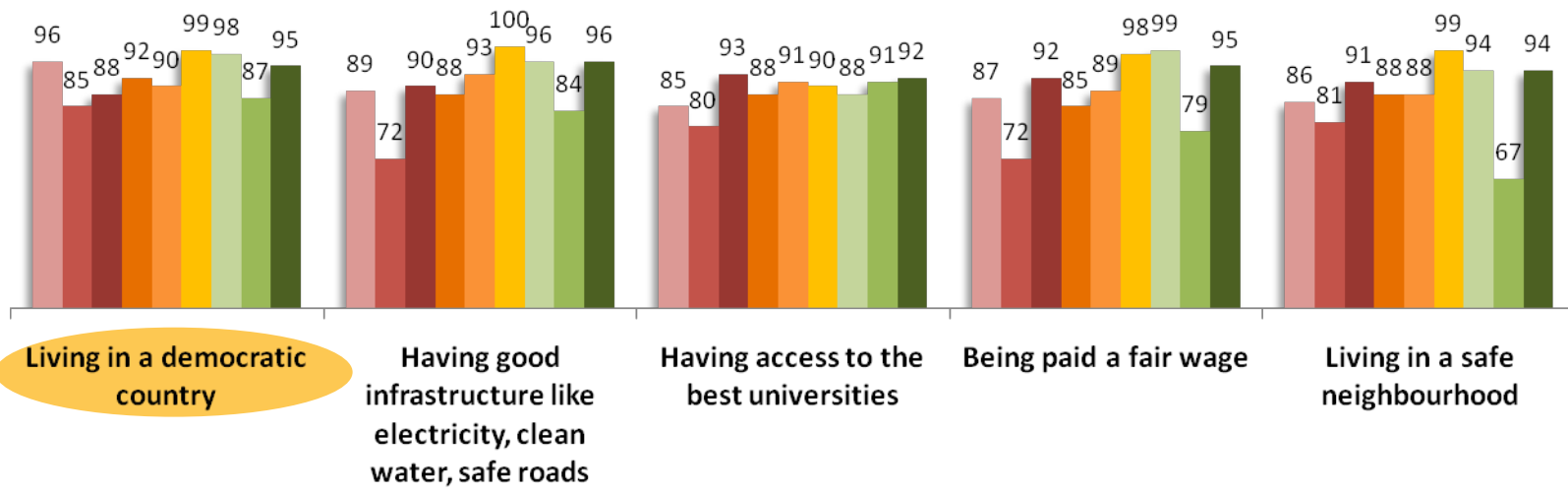
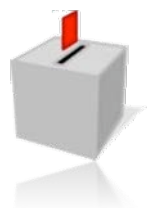
# GENERAL OUTLOOK

2



- The single most important priority for young people in the region is living in a democratic country, followed by infrastructure and access to the best universities.

% of people placing importance on each of the following issues:  
 (% who answered 'Very Important' or 'Somewhat Important') Top 5



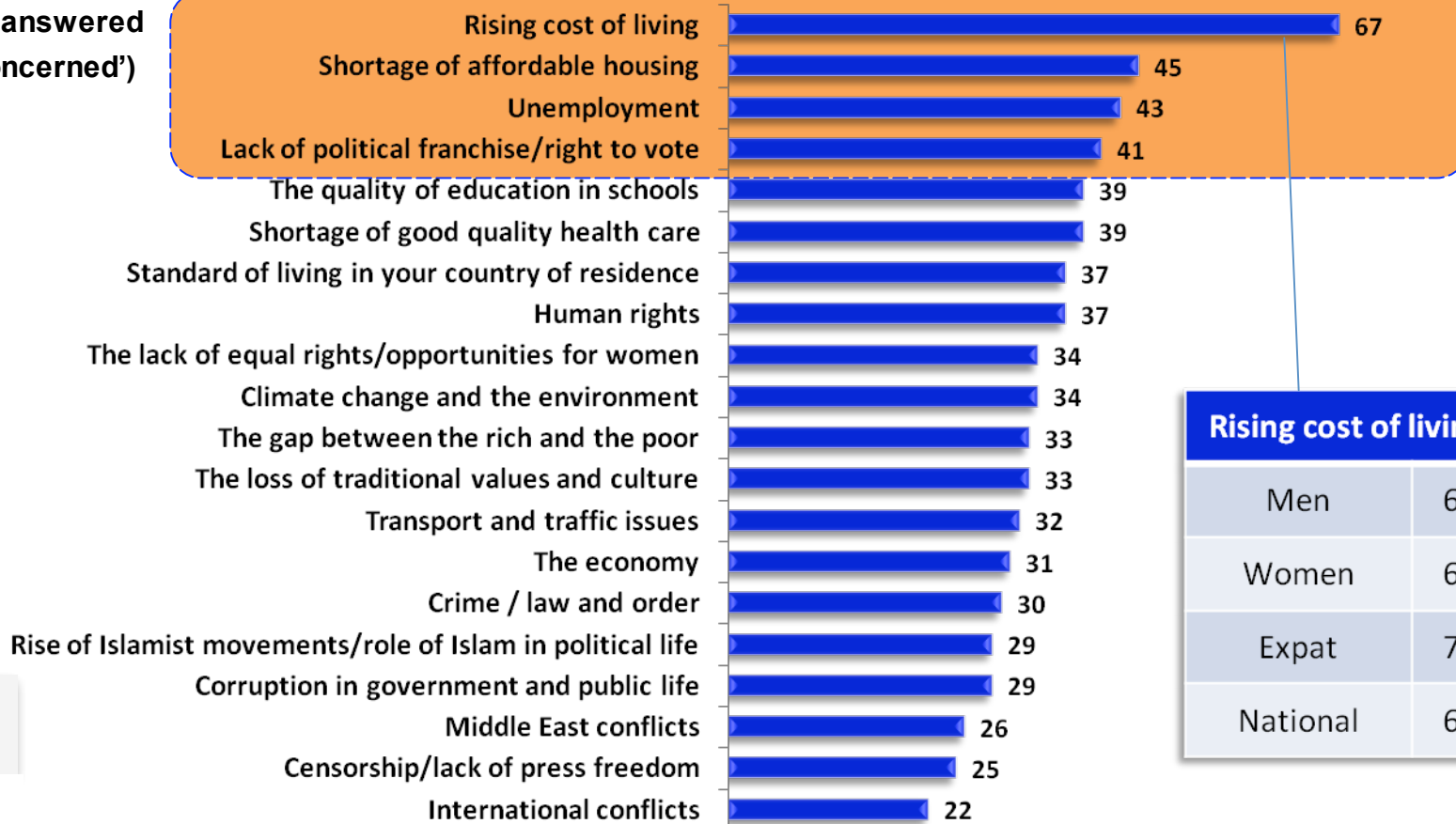
# GENERAL OUTLOOK

2



- Increase in the cost of living is the greatest concern for young people in the region, followed by the shortage of affordable housing and unemployment – and the right to vote is the fourth biggest concern.

(% who answered 'Very concerned')



## Rising cost of living

Men	69
Women	65
Expat	74
National	66

Among all 9 markets

# GENERAL OUTLOOK

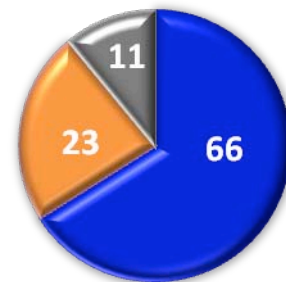
2



- Two thirds of Arab youth say that their country is moving in the right direction.
- Arab expatriates are more likely to think that their country of residence is heading in the right direction than nationals.

Thinking about the last five years, do you think things in your country of residence are going in the right direction or are they going in the wrong direction?

Among all 9 markets

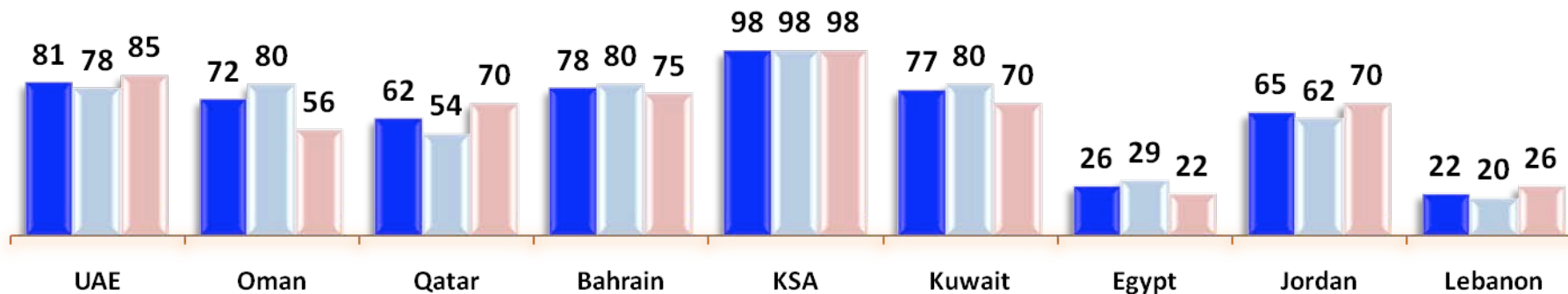


- Right Direction
- Wrong Direction
- Don't know

% Right direction	
Men	67
Women	64
Expat	78
National	63

## % Right direction

■ Among all ■ Men ■ Women

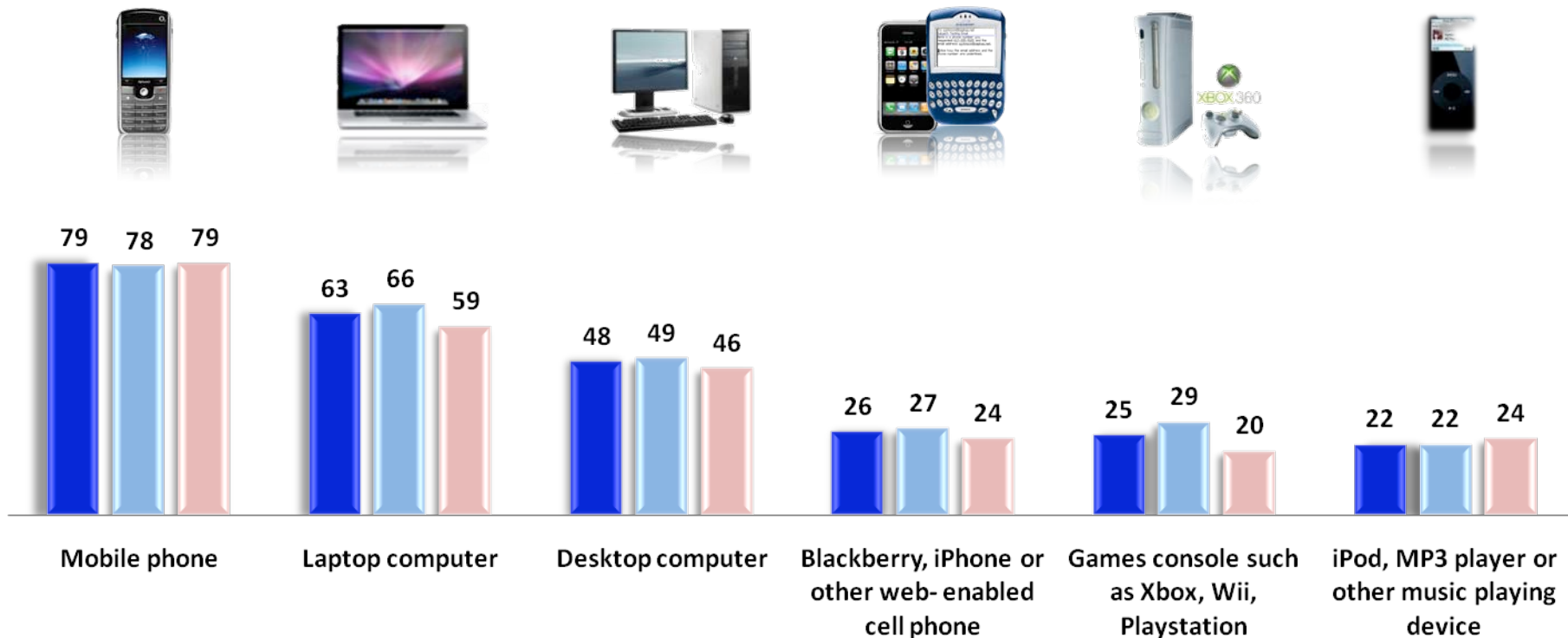


# TECHNOLOGY OWNERSHIP 3



- Almost 4 in 5 of youth own a mobile phone, and 1 in 4 own a web-enabled phone. Many also have access to either a Desktop or Laptop computer.

Which of the following do you own or have exclusive use of?



■ Among all 9 markets  
 ■ Men  
 ■ Women

# TECHNOLOGY HABITS

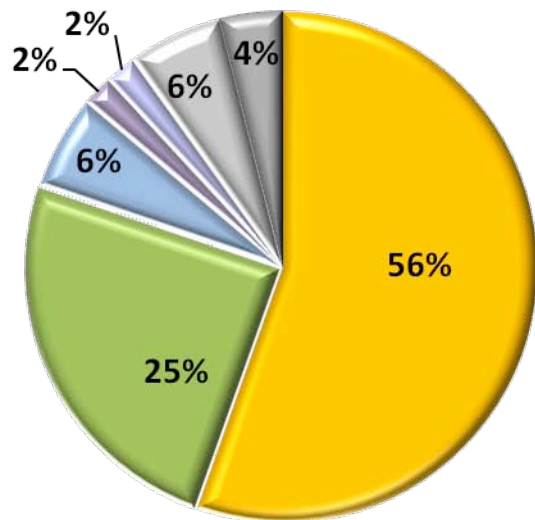
3



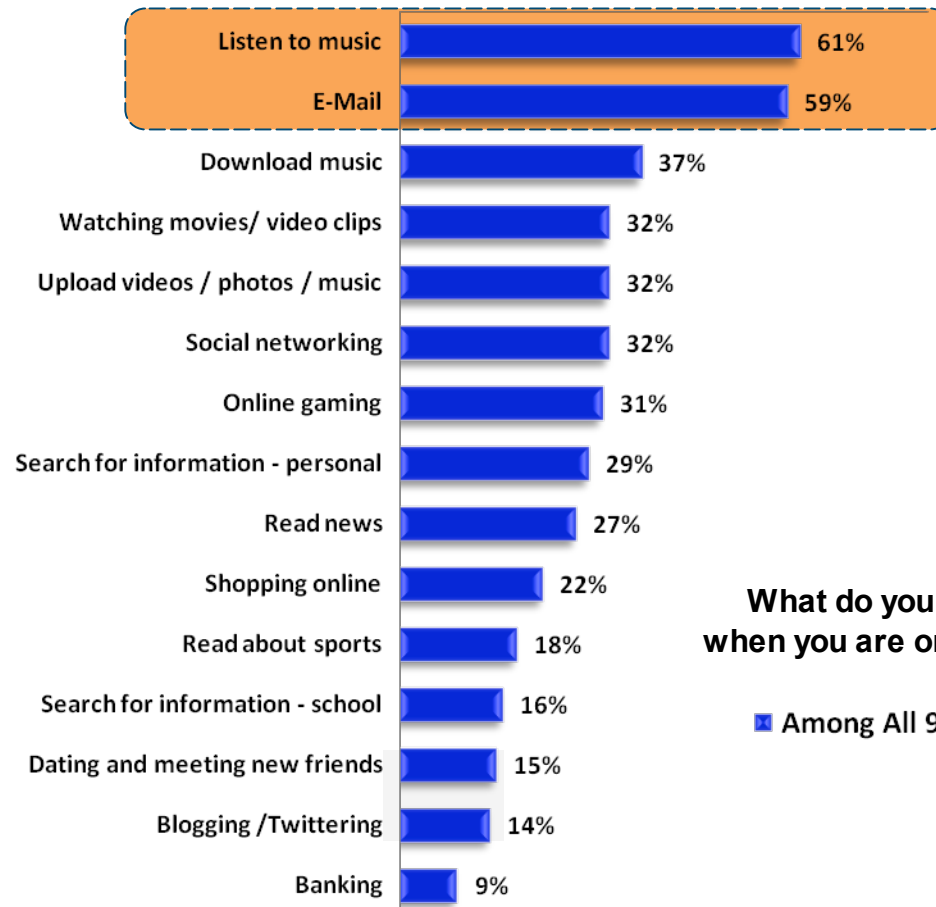
- Nearly 3 in 5 say they use the Internet at least once a day, with music and email as the main online activities.

How often do you generally use the Internet?

Among All 9 markets



- Daily
- Several times a week
- Once a week
- < Once a week
- < Once a month
- Never



What do you do when you are online?

■ Among All 9 markets

# MEDIA CONSUMPTION

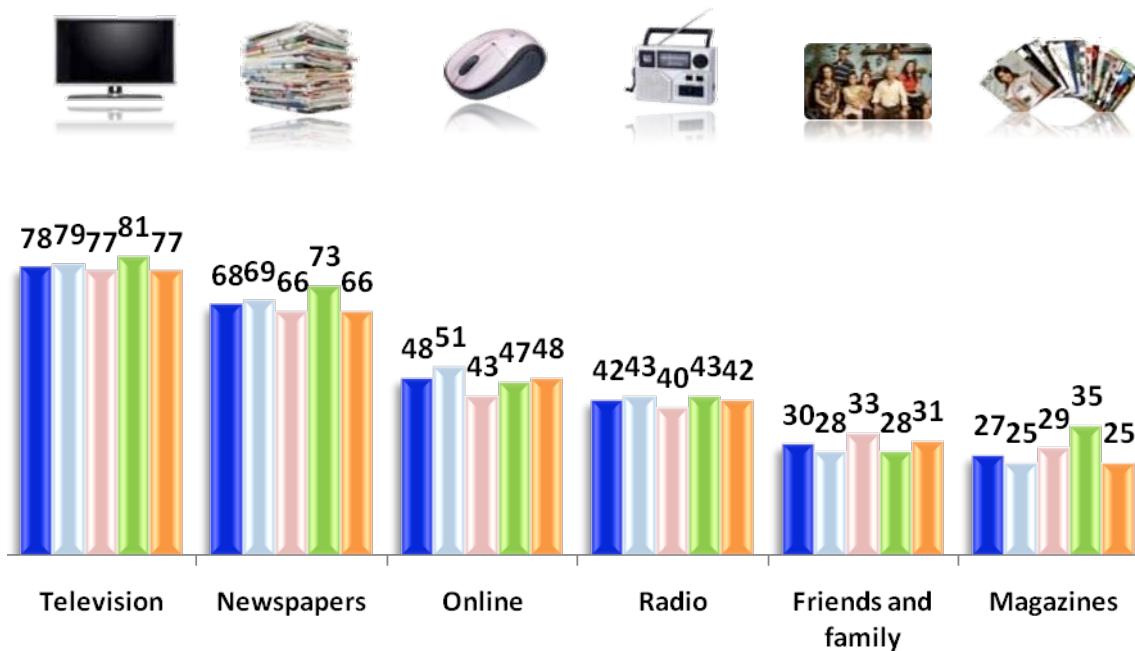
4



- Overall, TV and newspapers are the main sources of news, followed by the Internet.
- News and current affairs are consumed most by young people in Jordan, Lebanon and UAE.

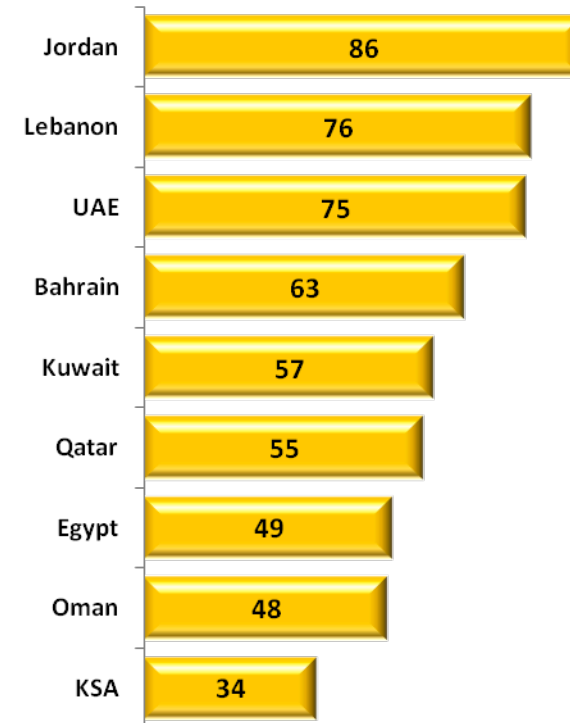
Where do you get your news?

■ Among All 9 markets    ■ Men  
■ Women    ■ Expat  
■ National



How often do you update yourself on news and current affairs?

% Several times a day, daily, nearly every day



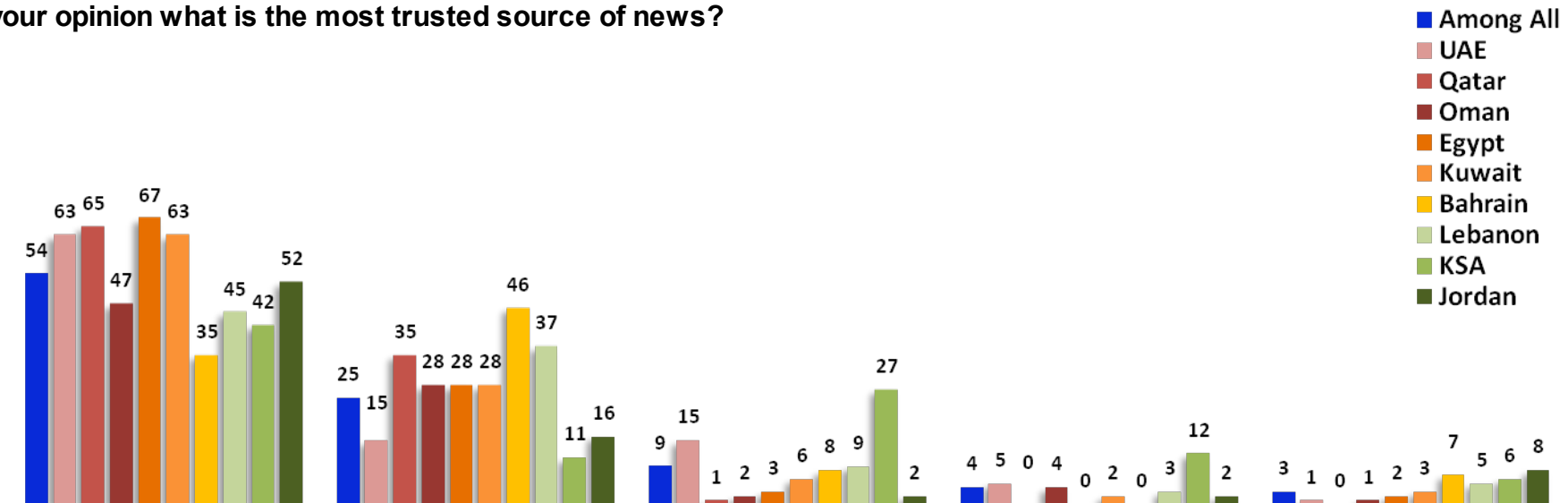
# MEDIA CONSUMPTION

4



- In all markets, except Bahrain, TV news channels are the most trusted source of news.
- Websites have the highest levels of trust in Saudi Arabia.

In your opinion what is the most trusted source of news?



TV news channels



Newspaper



Websites



Magazine



Radio shows



# SOCIAL MEDIA

4



- When online, young people in all regions are most likely to use sites like Google, Facebook and Yahoo!.
- Nearly 3 in 4 use social networking sites to keep in contact with friends

Top 10 websites among all 9 markets	UAE	Oman	Qatar	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon
Google	85	90	100	99	44	92	96	89	63
Facebook	67	36	85	49	49	71	67	94	82
Yahoo!	86	43	96	69	19	53	74	67	31
Windows Live / Hotmail	26	53	35	81	20	67	45	36	62
YouTube	54	31	78	57	13	49	37	44	35
MSN	35	24	43	56	6	21	33	70	68
Maktoob	19	8	52	25	0	10	1	16	0
Google mail (Gmail)	17	4	25	8	10	14	13	0	3
eBay	8	6	25	5	5	1	8	27	9
MySpace	5	1	27	1	2	13	13	20	9



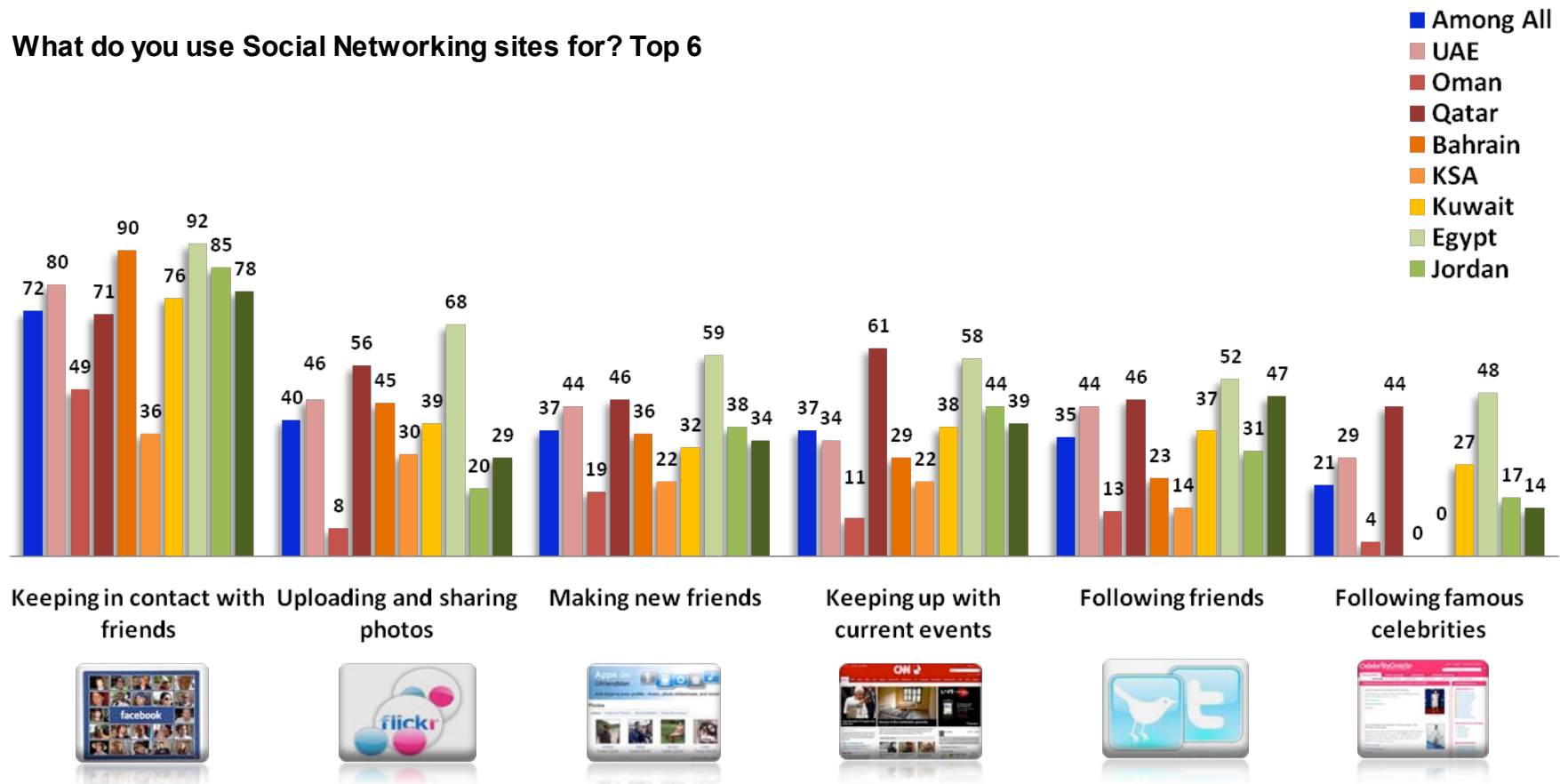
# SOCIAL MEDIA

4



- Social networking is most frequently used for maintaining contact with friends, particularly amongst youth in Egypt and Bahrain.

What do you use Social Networking sites for? Top 6

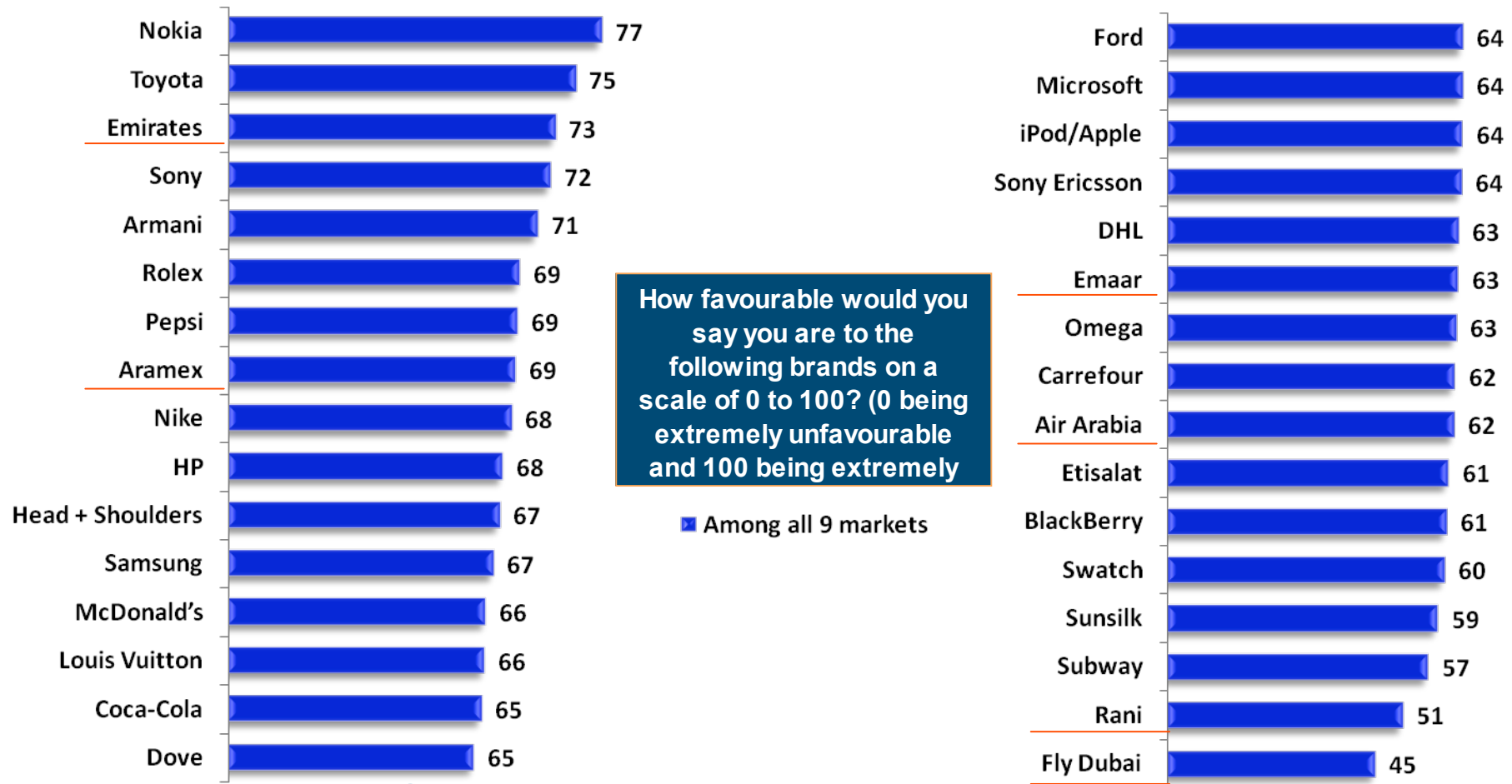


# BRAND FAVOURABILITY

5



- Nokia appears to be one of the most popular brands in the region.
- But other regional brands have high favourability, notably Emirates.

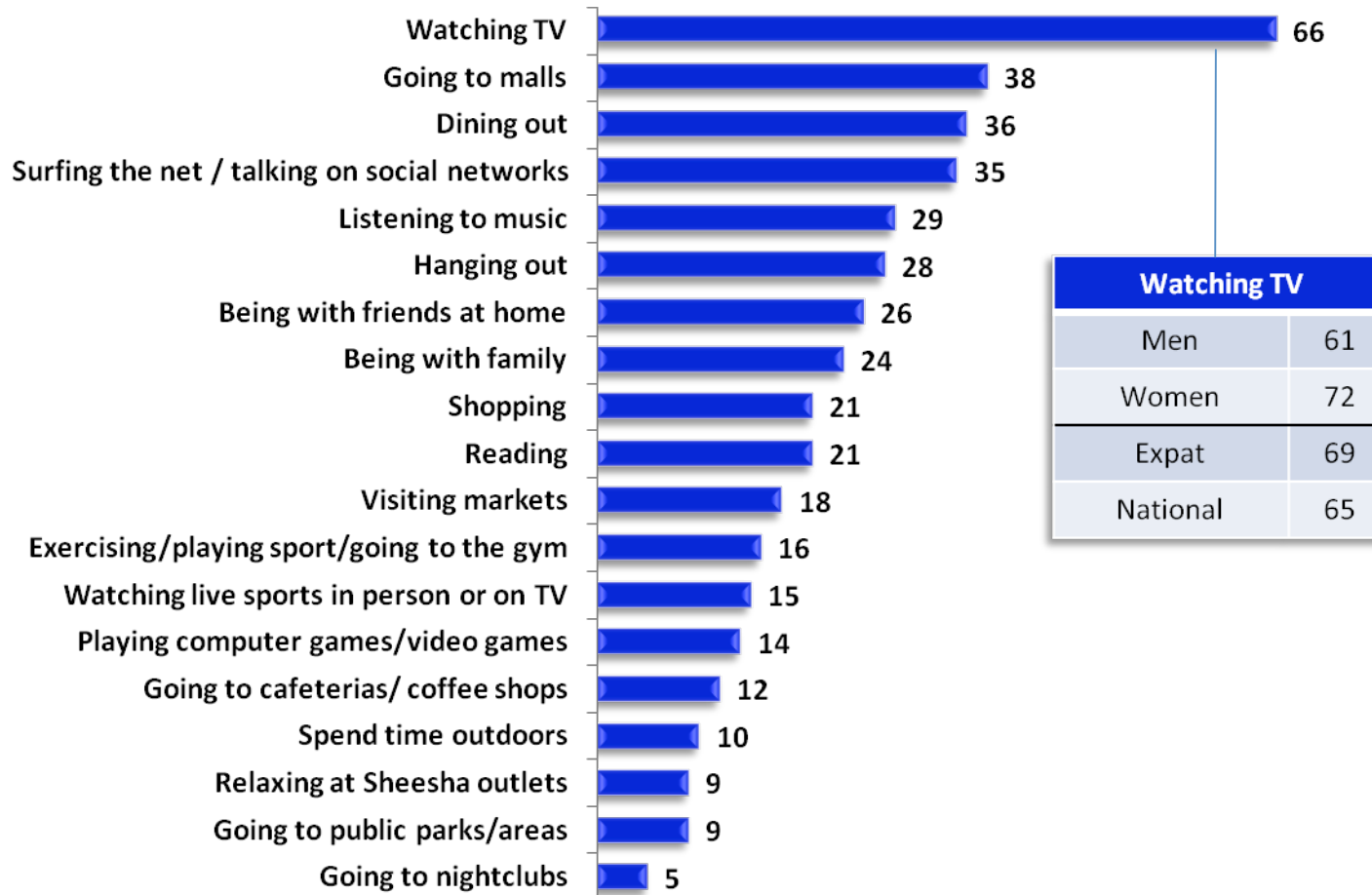


# LEISURE TIME

6



- TV is easily the most popular activity for young people in the region, followed by going to malls and dining out.
- Less than a fifth admit to spending leisure time exercising/playing sports/going to the gym.



**What do you like to do for leisure?**  
 ■ Among all 9 markets

Watching TV	
Men	61
Women	72
Expat	69
National	65

# SPENDING & DEBT

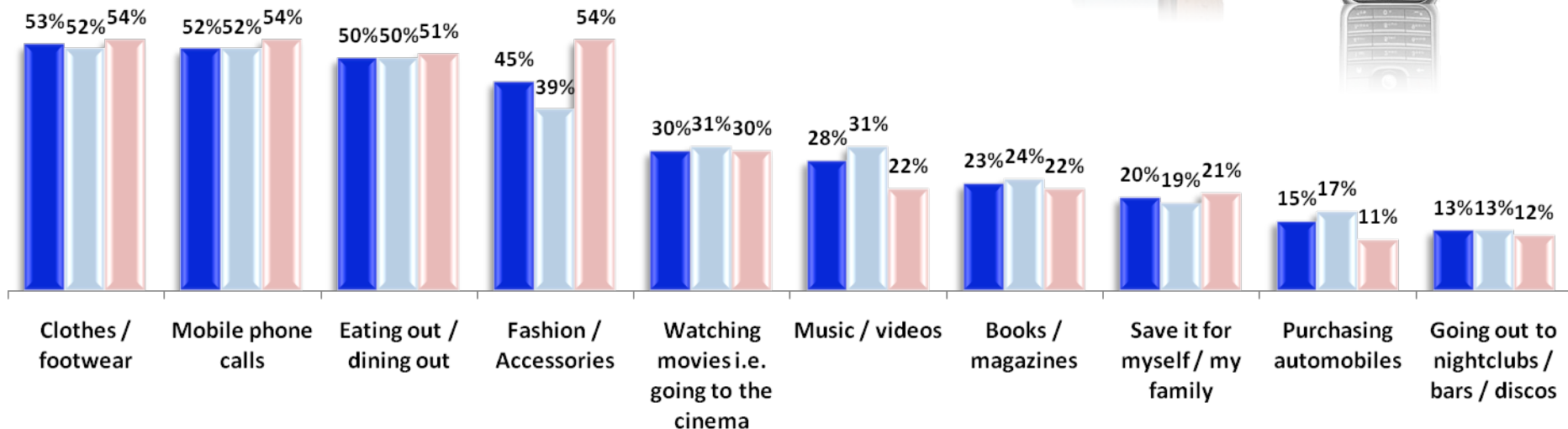
6



- Over half say they spend their money on personal items like clothes and mobile calls, as well as dining out. Women are more likely to be spending money on fashion/accessories.

What do you spend your money on?

■ Among All 9 markets ■ Men ■ Women



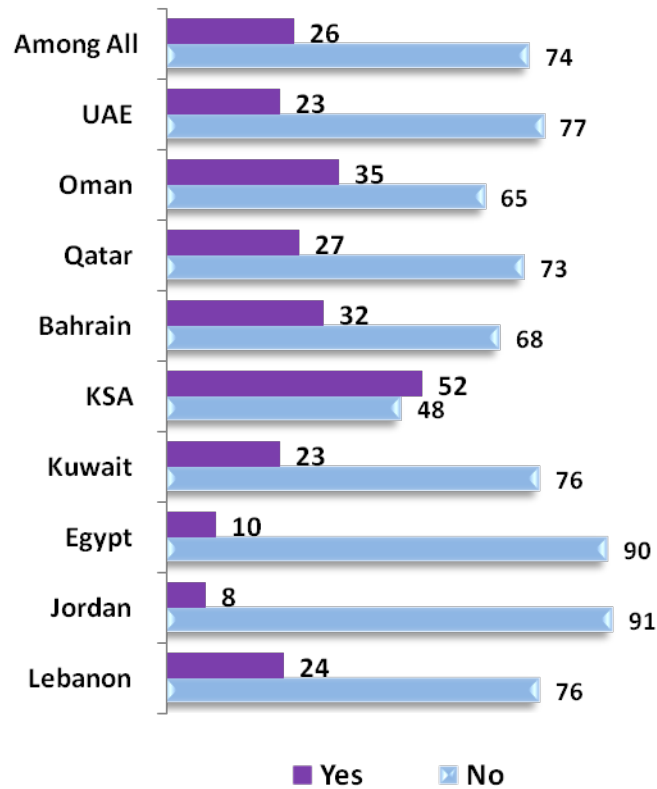
# SPENDING & DEBT

7



- More than a quarter of Arab youth claim to be in debt, and more than half of youth in Saudi Arabia admit to having debt; credit cards are the main culprits.

Do you have any personal debt?



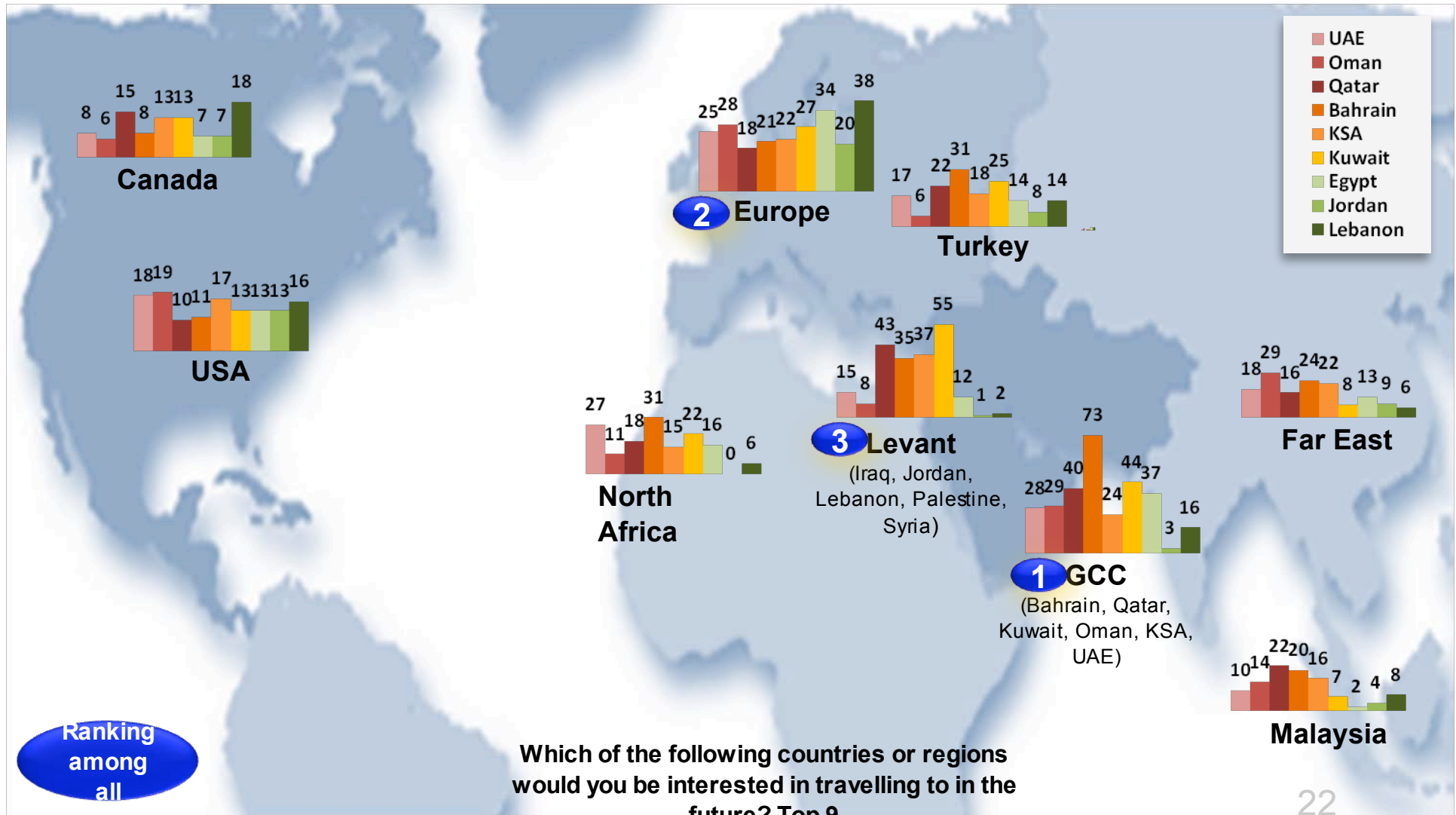
What kind of debt do you have?	Credit cards	Student loans	Personal bank loan	Small business loan	Mortgage	Auto loan	Don't know
Among All	40	8	25	4	1	21	2
UAE	32	15	38	9	0	6	0
Qatar	28	8	11	0	0	53	0
Oman	23	0	31	11	0	25	11
Egypt	25	8	8	8	0	50	0
Kuwait	33	7	22	2	0	31	4
Bahrain	45	5	27	0	0	23	0
Lebanon	16	9	27	9	2	38	0
KSA	66	5	23	0	0	6	0
Jordan	13	40	20	0	27	0	0

# TRAVEL HABITS

8



- Within the region, the GCC and Levant are the most popular travel destinations. Europe is the most popular outside the region, particularly for those from Lebanon and Egypt.



# AIRLINE PREFERENCE

8



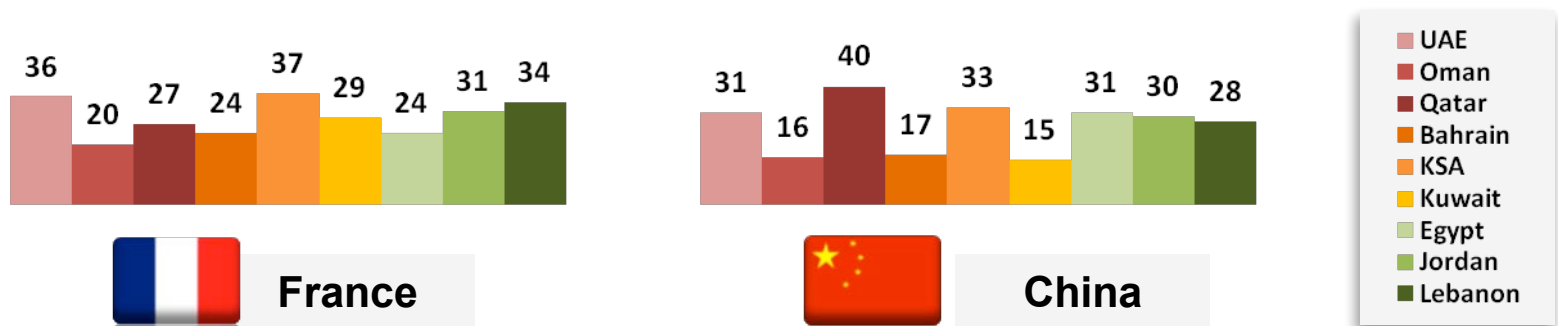
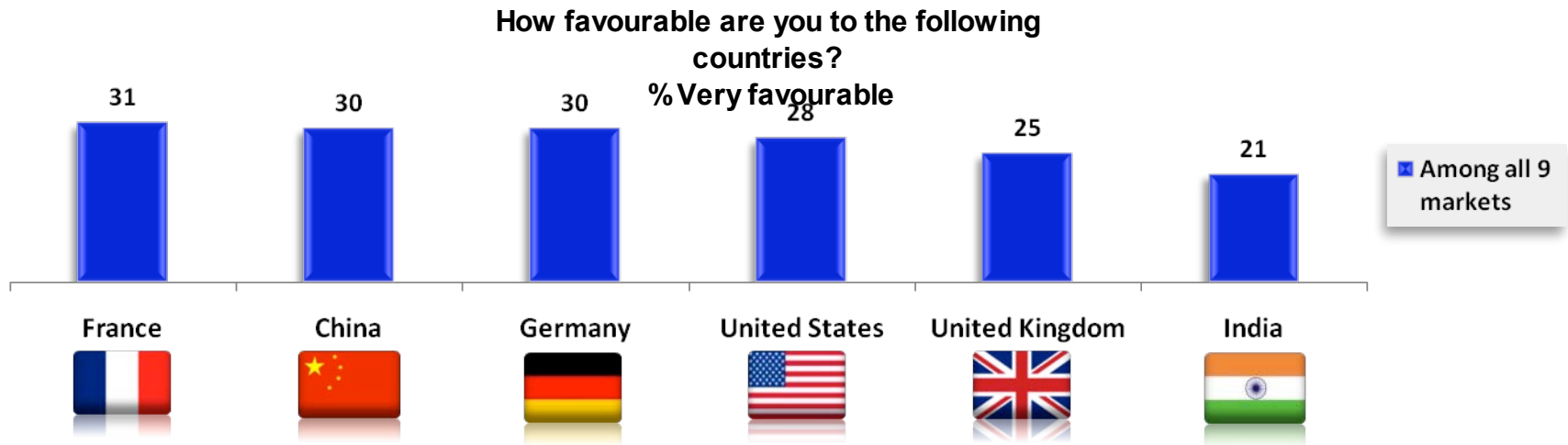
- Arab youth strongly prefer flying their national airlines, with Emirates enjoying high favourability across the region.
- The Top 10 airlines for Arab youth are all Middle Eastern carriers.

do you prefer to travel on?	Base	UAE	Qatar	Oman	Egypt	Kuwait	Bahrain	Lebanon	KSA	Jordan
Emirates	23	52	18	14	18	28	28	8	19	4
Saudi Airlines	18	1	0	1	24	6	21	15	73	1
Gulf Air	15	5	36	23	5	11	59	1	9	6
Qatar Airways	12	3	78	17	0	6	14	4	1	0
Egypt Air	11	4	3	0	68	6	4	3	4	2
Air Arabia	11	11	13	7	17	4	16	7	19	5
Royal Jordanian	10	1	2	0	1	1	4	2	12	71
Kuwait Air	8	1	0	7	1	65	8	0	1	1
Jazeera Airways	5	0	11	1	1	31	5	0	3	0
Fly Dubai	4	3	2	3	2	4	1	8	13	1
Bahrain Air	4	0	6	0	1	0	31	1	2	1
British Airways	4	4	5	1	2	7	10	4	4	0
Etihad	4	22	2	9	0	0	1	0	0	0

# INTERNATIONAL OUTLOOK 8



- Arab youth are increasingly looking East in response to the shifting global economy.
- Overall, France, China and Germany have similar levels of favourability.





# NATIONAL ALLIES

9



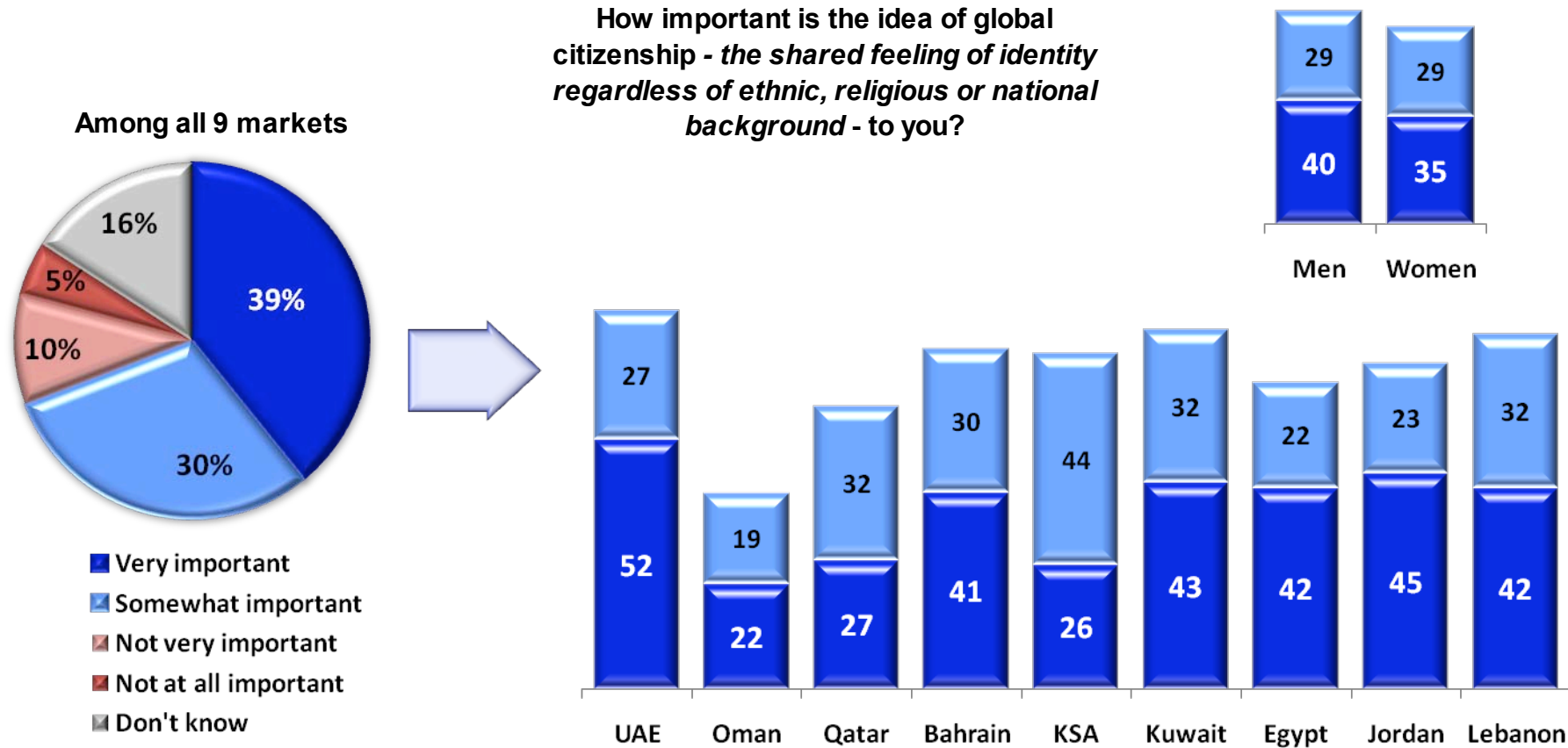
- Rather than to the international community, Arab youth look within the region for national support.
- But some youth, especially in the Gulf, see the United States playing an important

Who would you see as your country's biggest ally?

	Kuwait	Bahrain	Qatar	KSA	Oman	UAE	Jordan	Egypt	Lebanon
1	USA 67%	USA 61%	USA 43%	UAE 52%	UAE 44%	KSA 60%	KSA 55%	KSA 54%	KSA 37%
2	KSA 46%	UAE 39%	UAE 27%	Jordan 35%	KSA 31%	Qatar 42%	Egypt 52%	UAE 53%	FR 32%
3	UAE 40%	KSA 34%	KSA 25% Lebanon 25%	Bahrain 29%	USA 20%	Bahrain 35%	UAE 46%	Kuwait 26%	USA 21% Qatar 21%



- The idea of global citizenship is important to almost 7 in 10 young people, with highest scores for those living in the UAE.



# FUTURE CAREERS

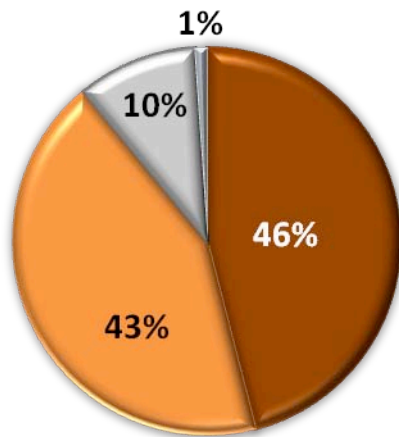
1  
0



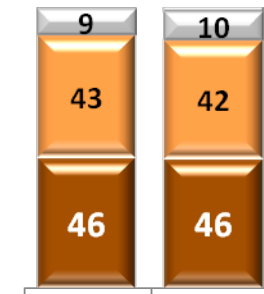
- Youth in the Middle East are evenly split on their preference to work in the government or private sector.
- But youth in the Gulf appear still strongly attached to a career in government, especially in Bahrain, Kuwait and the UAE.

Would you prefer to work for the Government or the private sector?

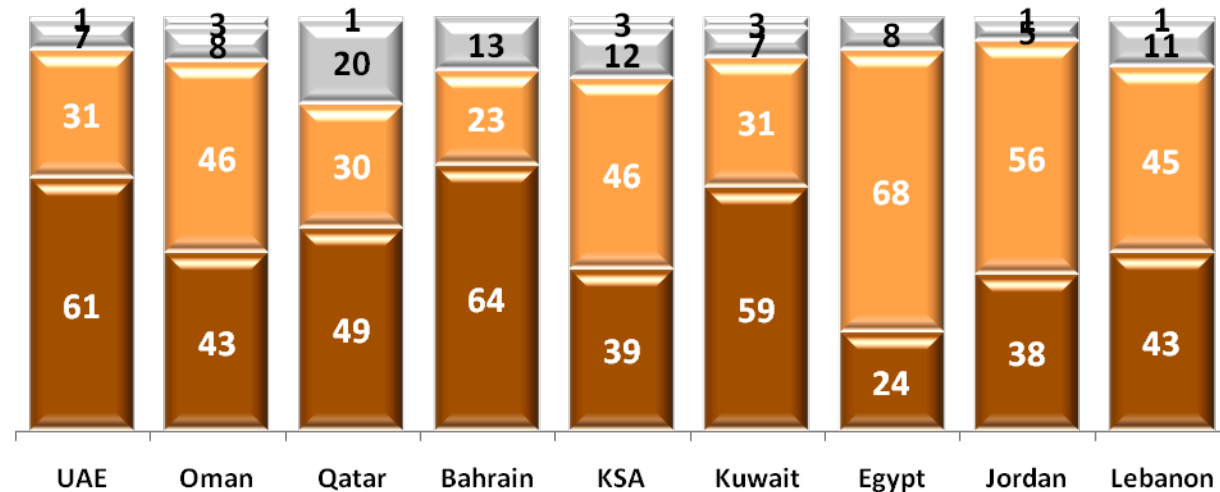
Among All 9 markets

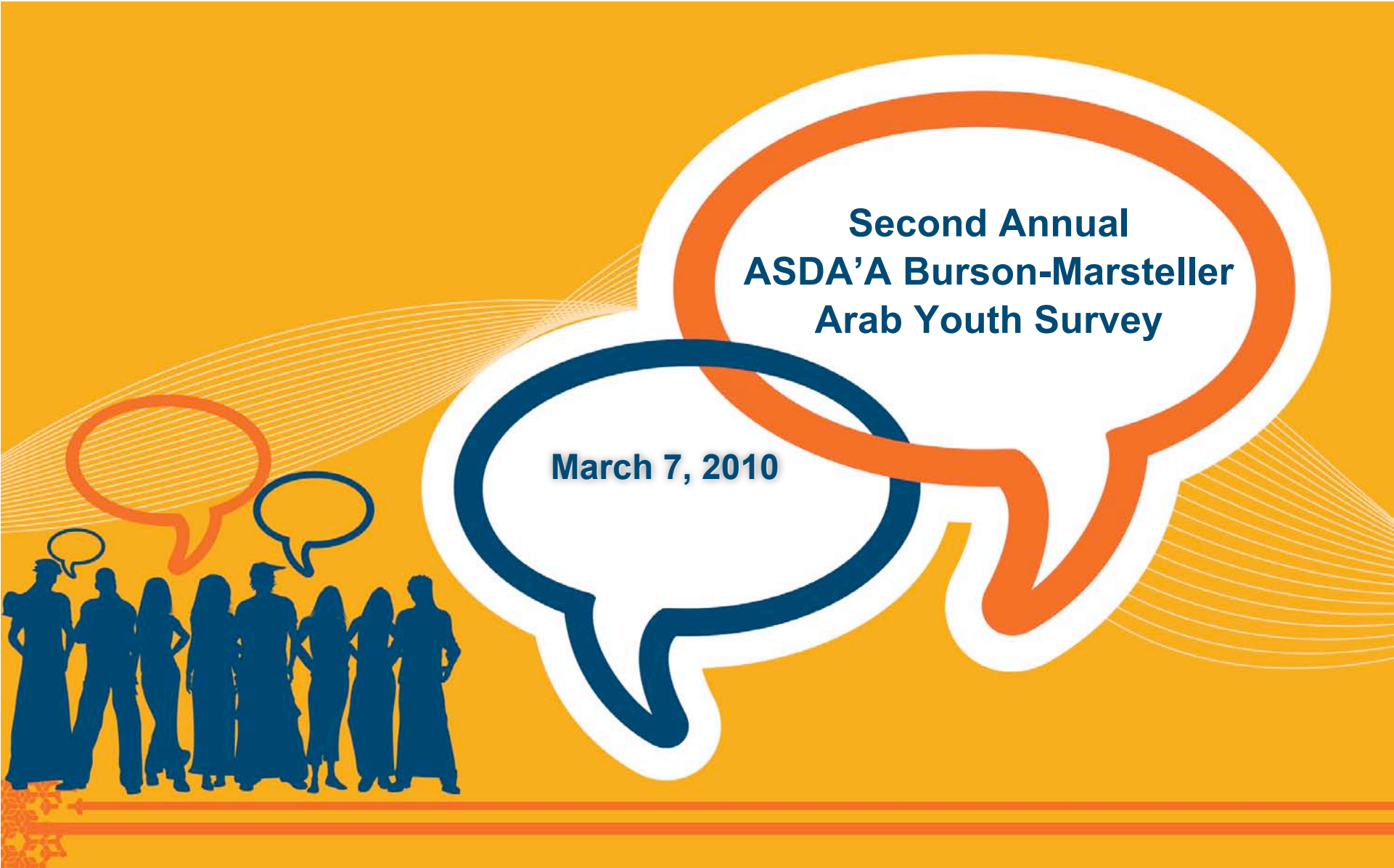


- Government
- Private sector
- No preference
- Don't know



Men Women





**Second Annual  
ASDA'A Burson-Marsteller  
Arab Youth Survey**

**March 7, 2010**

