



3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey
March 15, 2011

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



www.arabyouthsurvey.com | www.asdaa.com



OBJECTIVES

ASDA'A Burson-Marsteller commissioned Penn Schoen Berland (PSB) in October 2010 to carry out the survey among Arab national and expatriate youth aged 18-24 in 10 Middle East countries: the six countries of the Gulf Cooperation Council (Saudi Arabia, the UAE, Qatar, Bahrain, Qatar and Kuwait), Jordan, Lebanon, Egypt and, for the first time, Iraq.

The research was designed to uncover country differences and common trends, looking at concerns and priorities such as:

- Attitudes towards democracy
- Economic and social concerns
- Attitudes to foreign relations
- Personal and social values
- Attitudes towards education
- Perceptions of future careers
- Access to technology
- Social media networking
- Media consumption trends

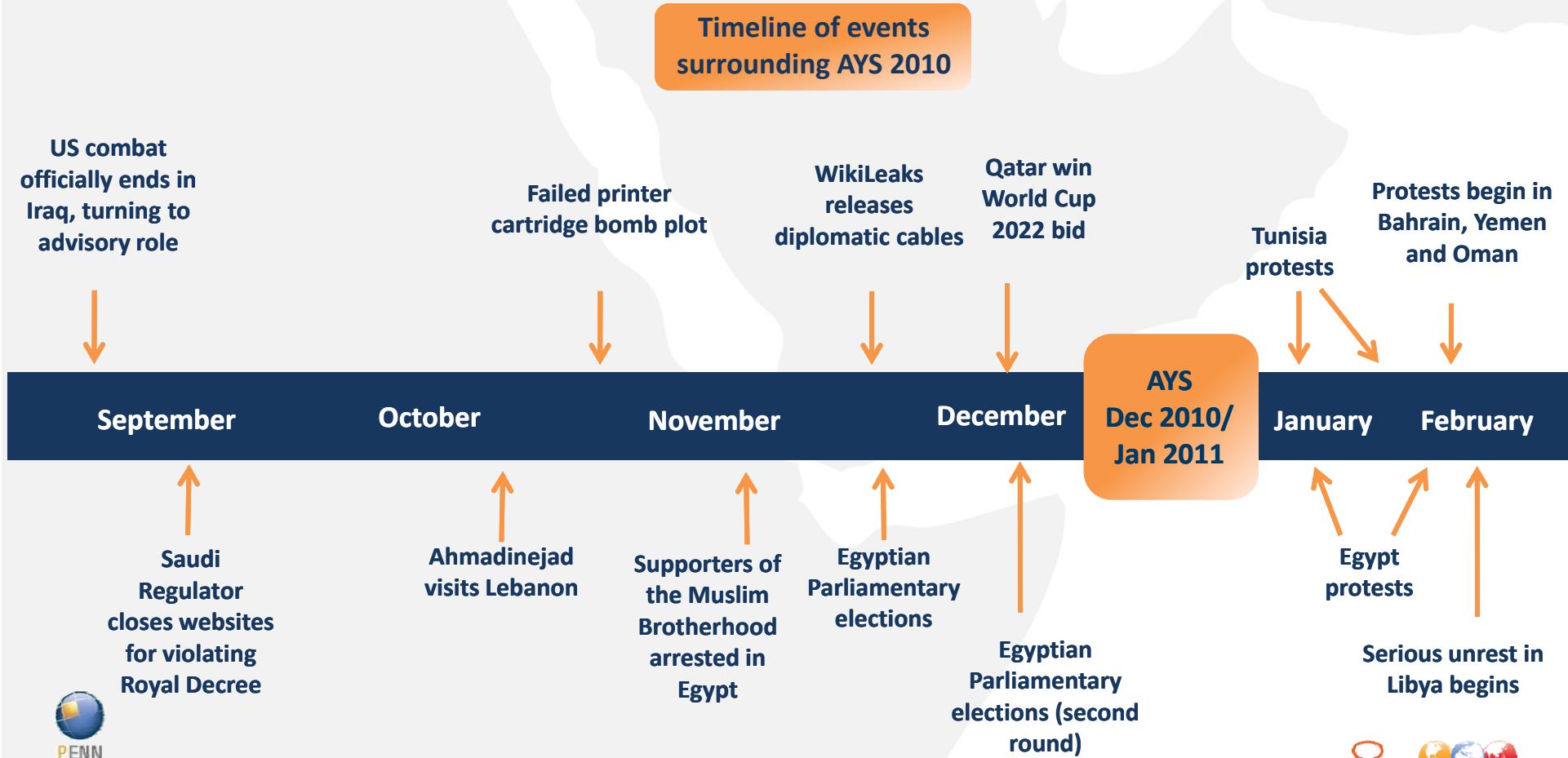




OBJECTIVES

The timeline below is a brief summary of events leading up to the Arab Youth Survey 2010. Protests in Tunisia, Egypt and other countries in the region post-date 2010 fieldwork:

Timeline of events
surrounding AYS 2010





METHODOLOGY

PSB conducted 2,000 interviews face-to-face* among respondents aged 18-24 from December 27, 2010-January 20, 2011. The table explains the country by country breakdown of the respondents.

Quotas were applied to:

Gender -

Male 60%

Female 40%

Quotas for each market -

New in
2010

UAE	Oman	Qatar	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon	Iraq
N=250	N=200	N=200	N=200	N=200	N=200	N=200	N=200	N=200	N=150
Nationals / Expats = 50 / 50	Exclusively Nationals	Nationals / Expats = 50 / 50	Exclusively Nationals	Nationals / Expats = 75 / 25	Nationals / Expats = 75 / 25	Exclusively Nationals	Exclusively Nationals	Exclusively Nationals	Exclusively Nationals
Dubai – 40%	Muscat – 50%	Doha – 55%	Manama – 100%	Jeddah – 40%	Kuwait City -20%	Cairo – 50%	Amman – 50%	East Beirut – 40%	Baghdad (50%)
Sharjah – 20%				Riyadh – 40%		Alexandria – 25%		Irbid – 25%	West Beirut – 40%
Abu Dhabi – 40%	Batinah – 50%	Al Rayyan – 45%		Dammam – 20%	Al Ahmadi – 20%	Mansoura – 25%	Zarqa – 25%	Tripoli – 20%	Basrah (25%)
				Al Farwaniya – 30%					



TOP TEN FINDINGS

1. An enduring desire for democracy
2. Anxiety grows about rising cost of living
3. Gap between rich & poor of increasing concern
4. Less optimism about economic recovery and future outlook
5. Education gap widens between Gulf states and other Arab countries
6. Increasing preference to work in private sector, eagerness to start own business
7. Internet makes more inroads, with social media growing in influence
8. Television the most popular and trusted source of news
9. Traditional values are paramount, while parents grow in influence
10. More positive perceptions of global powers, growing sense of global citizenship



3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

AN ENDURING DESIRE FOR DEMOCRACY



BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE

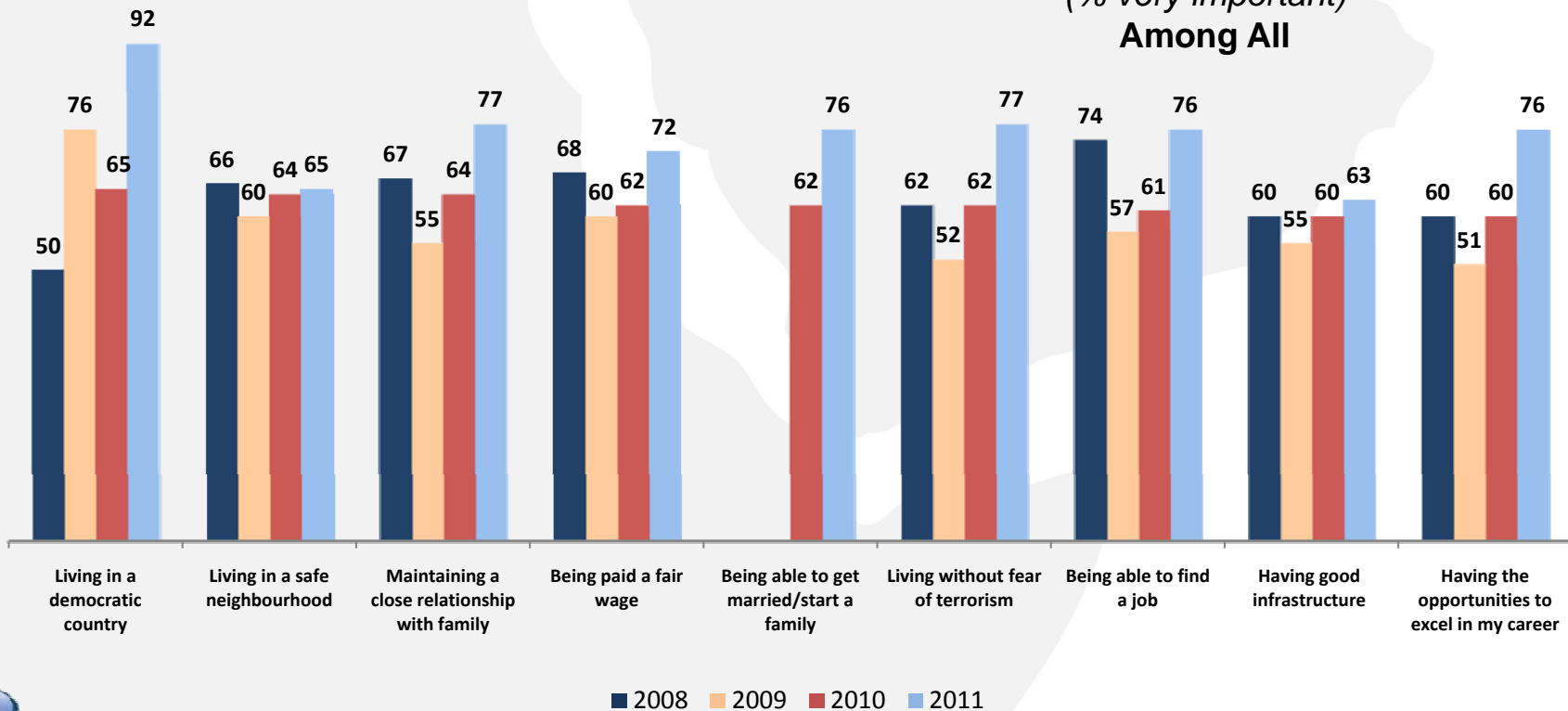




THE MOST IMPORTANT

- Living in a democratic country remains the most important priority.
- The importance of democracy has increased significantly in the past few months.

How important are each of the following to you?
(% very important)
Among All

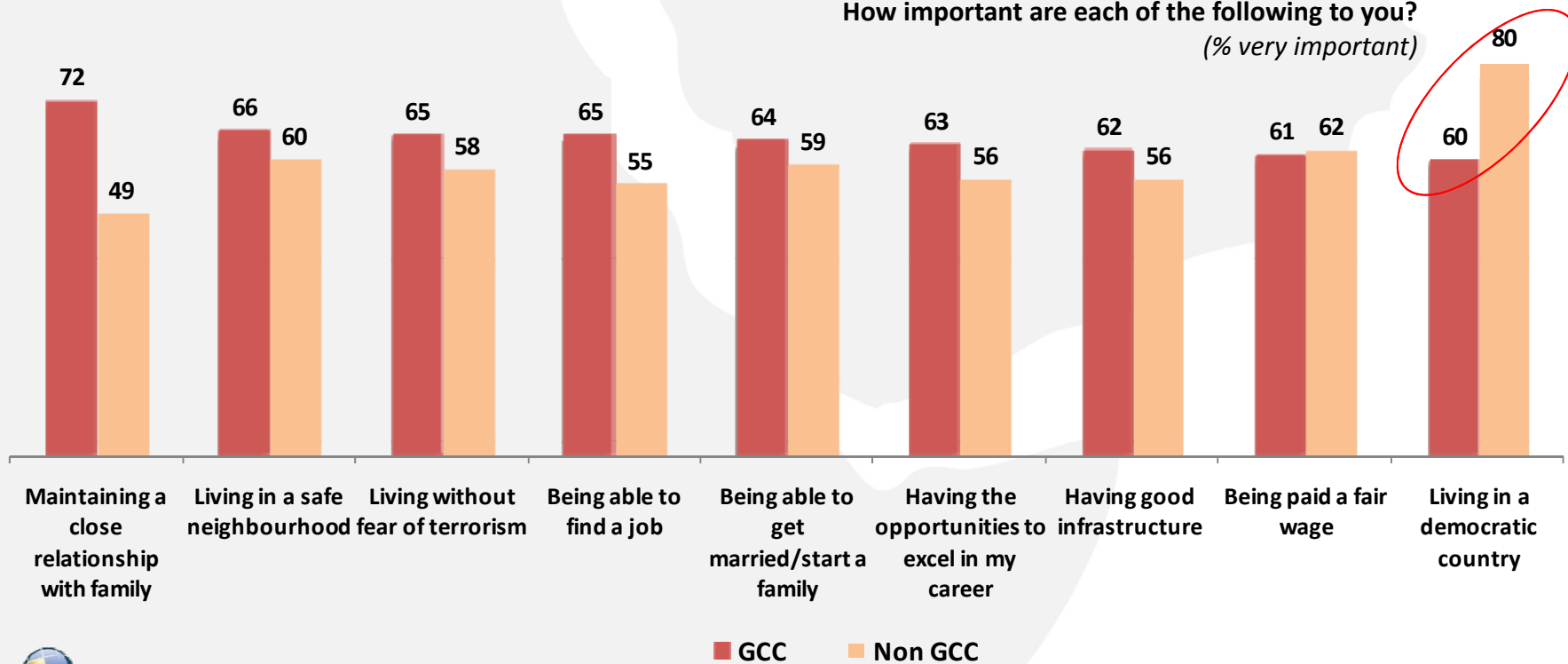




THE MOST IMPORTANT

- 4 in 5 for those in non-GCC countries consider the most important issue to be living in a democratic country.
- For those in the GCC, living in a safe neighbourhood and close relationships with family are key.

How important are each of the following to you?
(% very important)

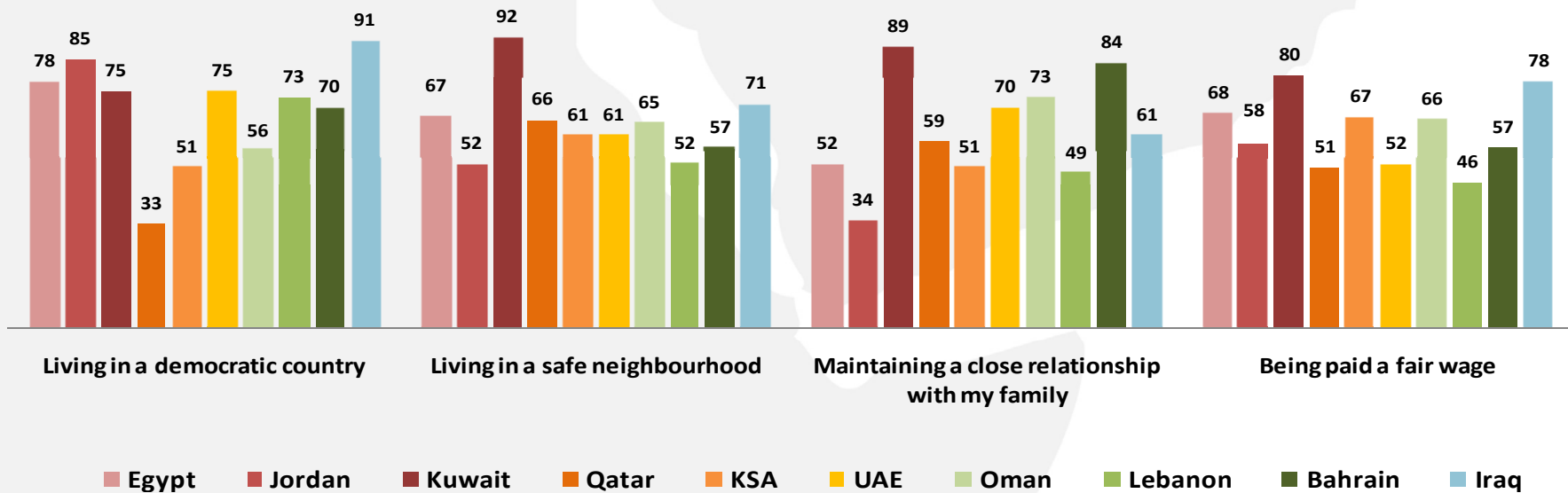




THE MOST IMPORTANT

- Nine in ten young Iraqis believe that living in a democracy is very important. There is also a strong call for it in Jordan, Egypt, Lebanon and Bahrain.
- In Bahrain, it is particularly important for youth to be able to have a family.

How important are each of the following to you?
(% very important)





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

ANXIETY GROWS ABOUT RISING COST OF LIVING

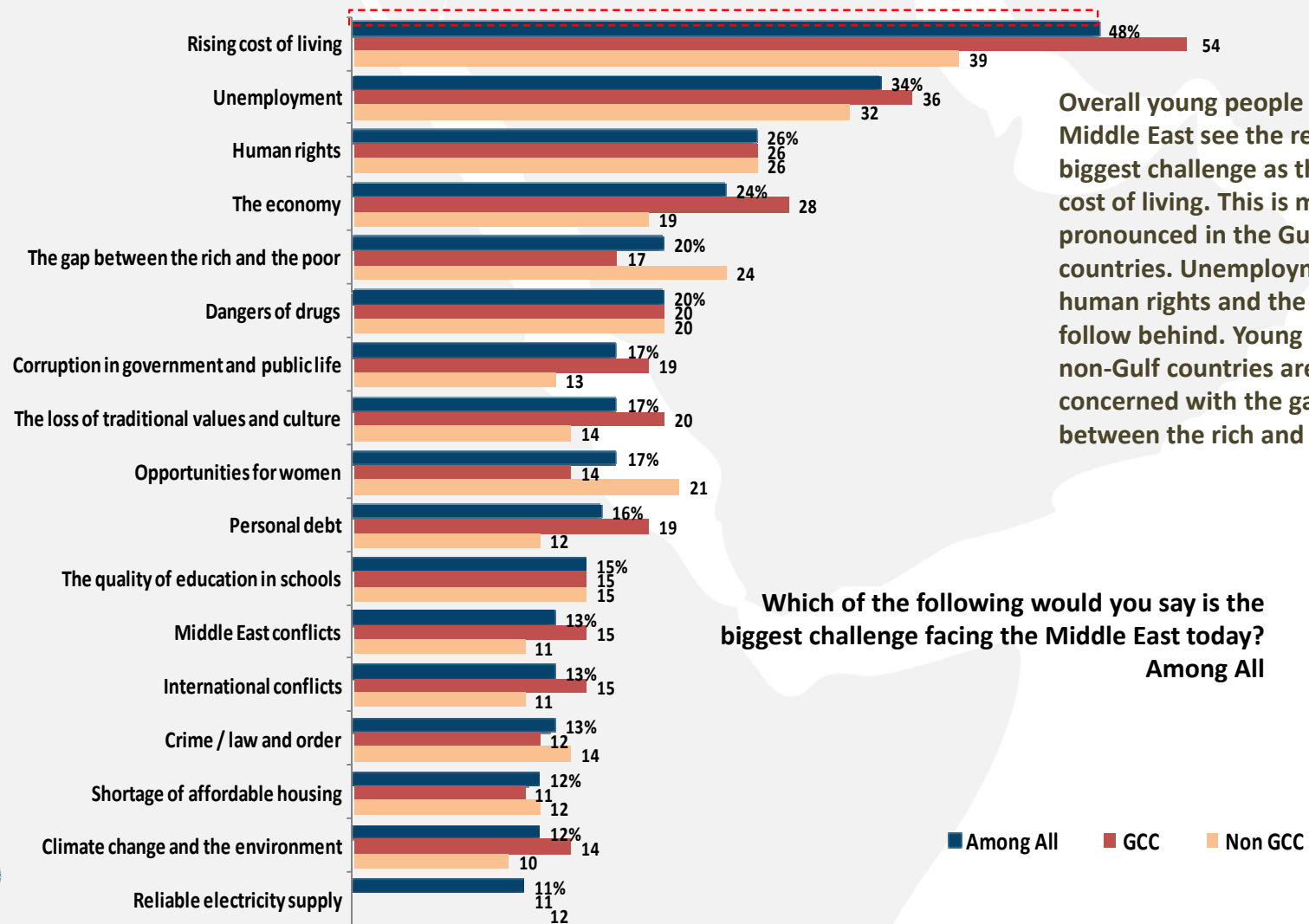


BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE





THE BIGGEST CHALLENGE



Overall young people in the Middle East see the region's biggest challenge as the rising cost of living. This is most pronounced in the Gulf countries. Unemployment, human rights and the economy follow behind. Young people in non-Gulf countries are more concerned with the gap between the rich and the poor.



3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

GAP BETWEEN RICH & POOR OF INCREASING CONCERN



PENN
SCHOEN
BERLAND

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE





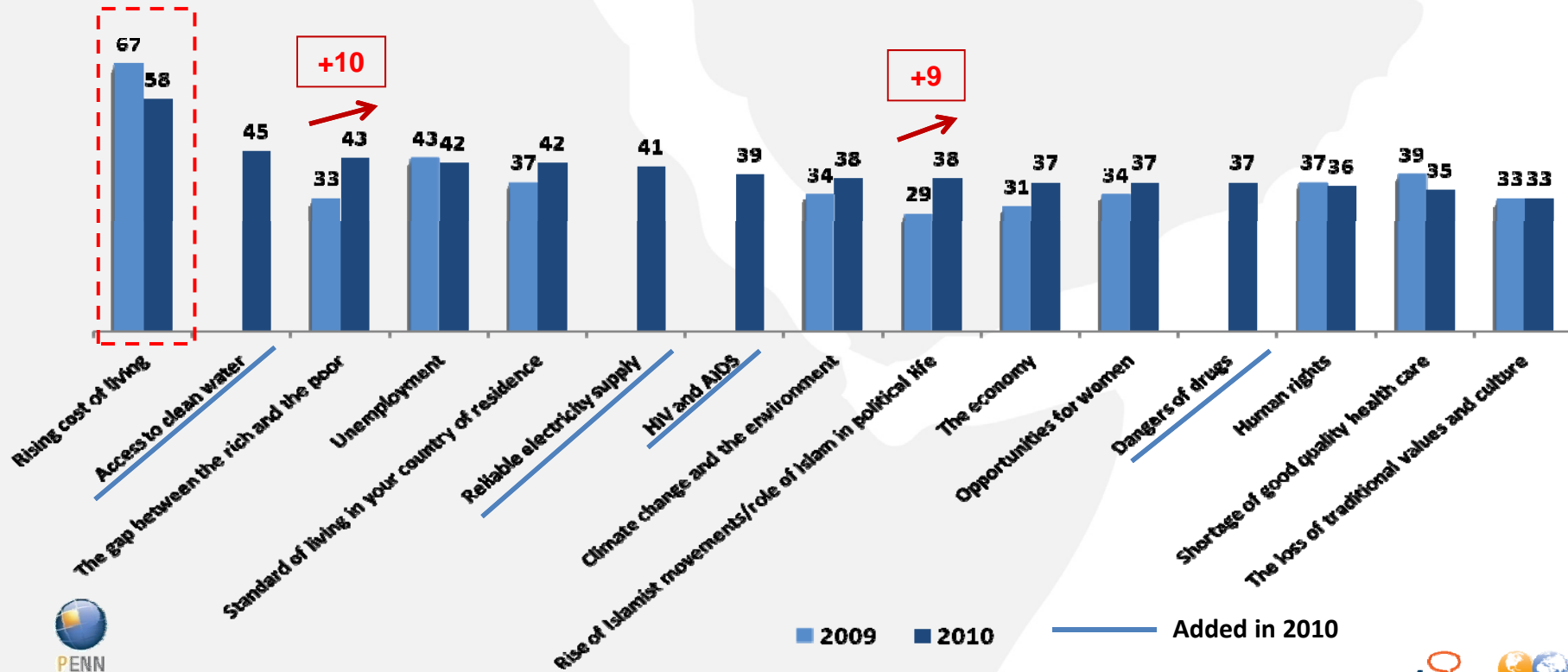
CONCERNS FOR 2011

How concerned would you say you are about each of the following issues?

(% very concerned)

Among All

- As well as being the biggest challenge, the rising cost of living is also the primary concern for youth across the region. There has been a sharp increase in concern over the rise of Islamist movements which is in tandem with a rising interest in democracy in the region.
- Unemployment remains one of the key concerns, while the rich/poor divide is an increasing concern.

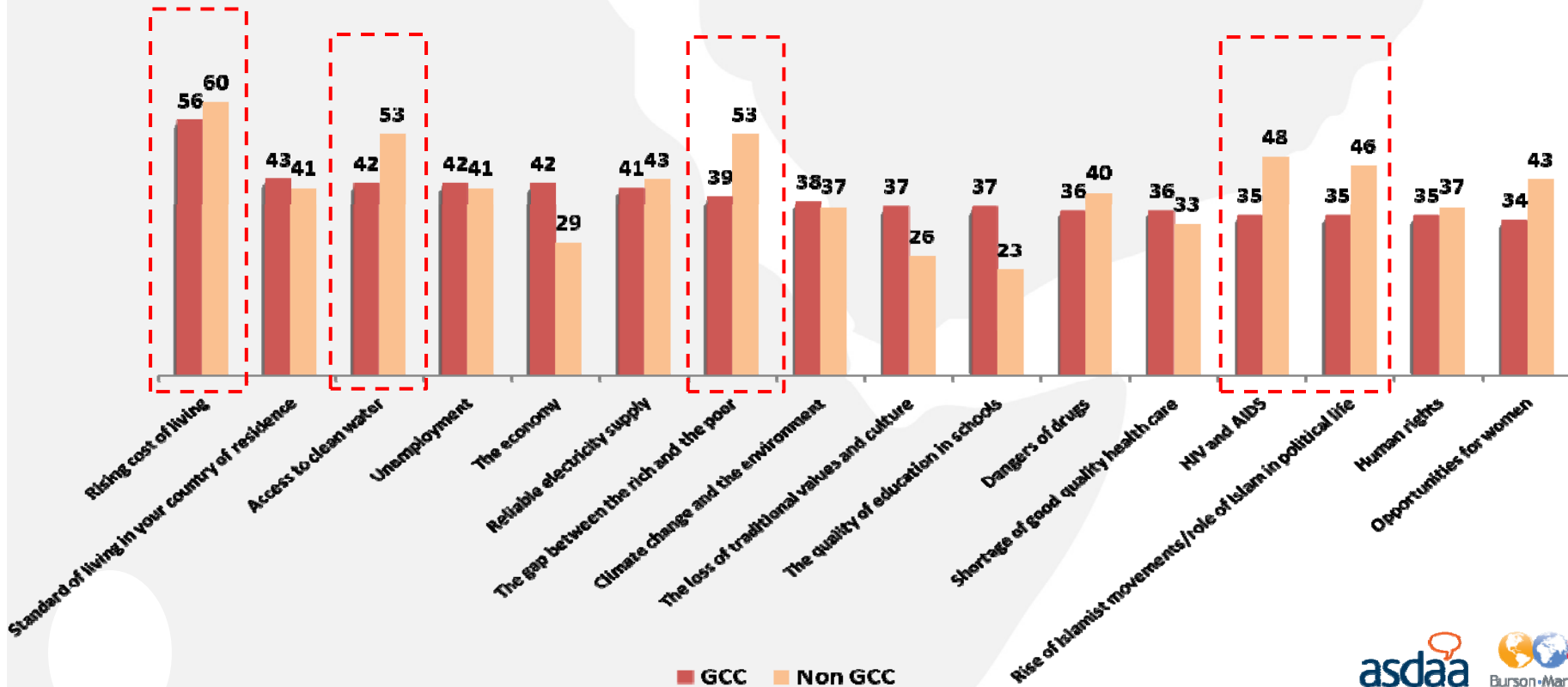




CONCERNS FOR 2011

How concerned would you say you are about each of the following issues?
(% very concerned)
Among All

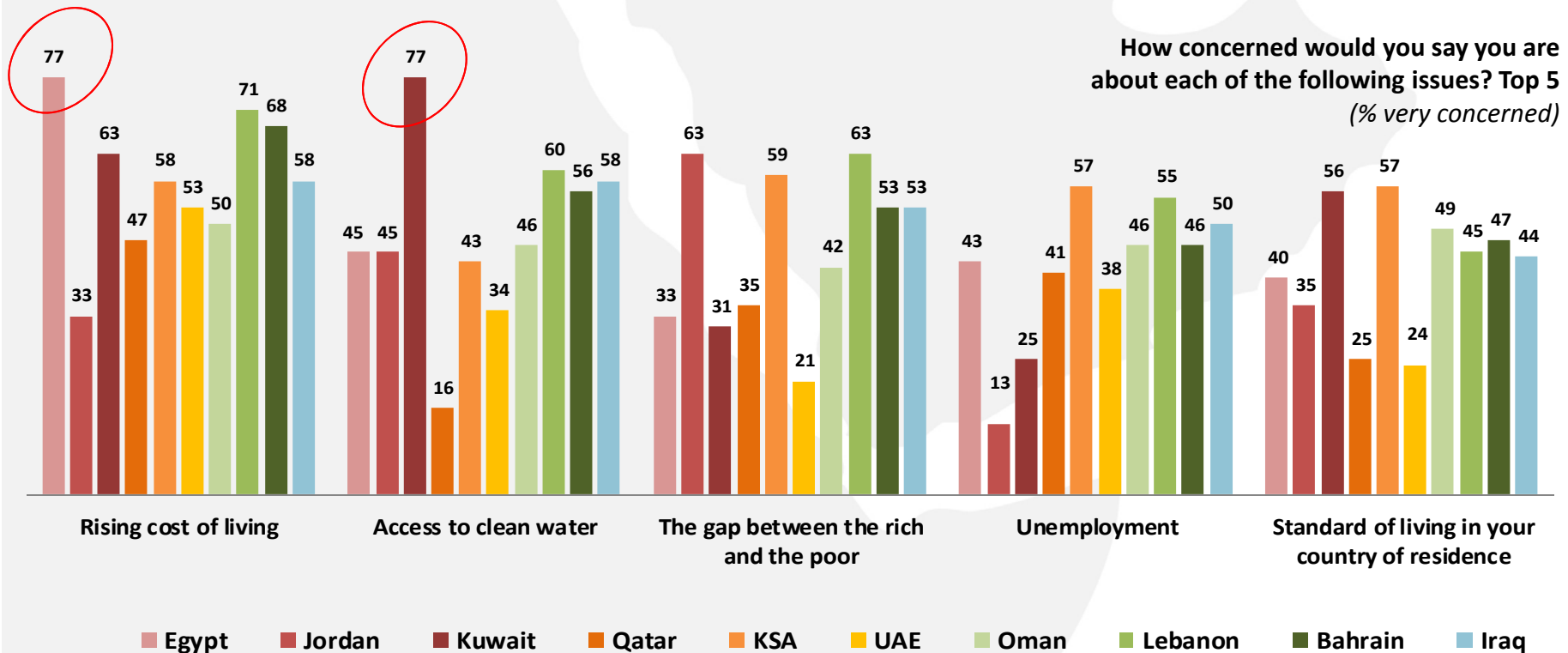
- Concerns over the rise in the cost of living and unemployment are constants throughout the Arab world, but other issues are of greater concern to those outside the wealthy Gulf states (GCC)
- Those in non-GCC countries are most concerned about the role of Islam in political life. HIV/Aids, access to clean water and the growing wealth gap





CONCERNS FOR 2011

- Those in Egypt, Lebanon and Bahrain are the most concerned about the rise in cost of living. In Egypt, standard of living and unemployment are also of concern, providing the backdrop on which to view January and February's protests.





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

LESS OPTIMISM ABOUT ECONOMIC RECOVERY AND FUTURE OUTLOOK



BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE





GENERAL OUTLOOK

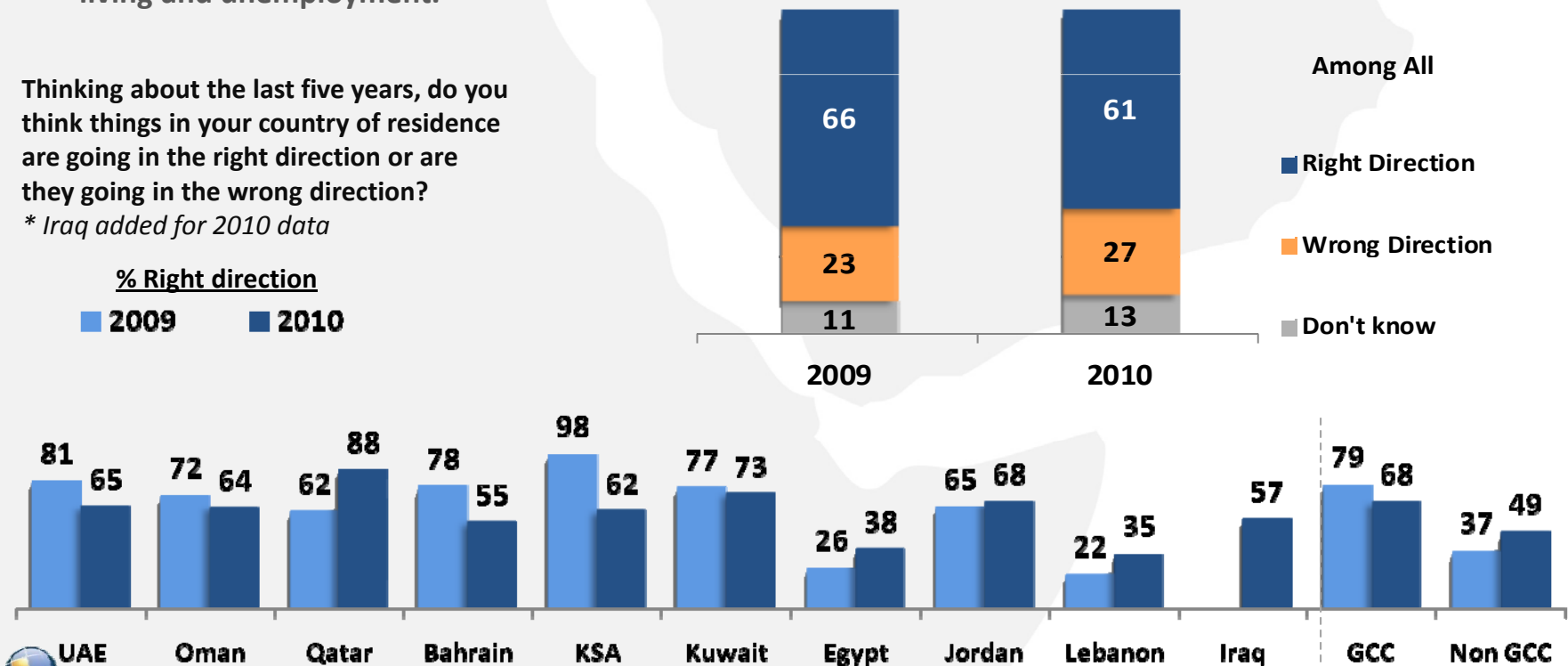
- Overall, the majority of Arab youth feel that their country is going in the right direction. Young people in the GCC countries are more likely to believe that their country is heading in the right direction, though there has been a positive uplift in non-GCC countries.
- Young Qataris feel most positive about their country's direction, likely helped by winning the 2022 World Cup.
- Egypt and Lebanon remain the most negative about their countries. This could be attributed to the slow recovery from the recession, and from concerns about how to bridge the gap between the rising cost of living and unemployment.

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?

* Iraq added for 2010 data

% Right direction

■ 2009 ■ 2010

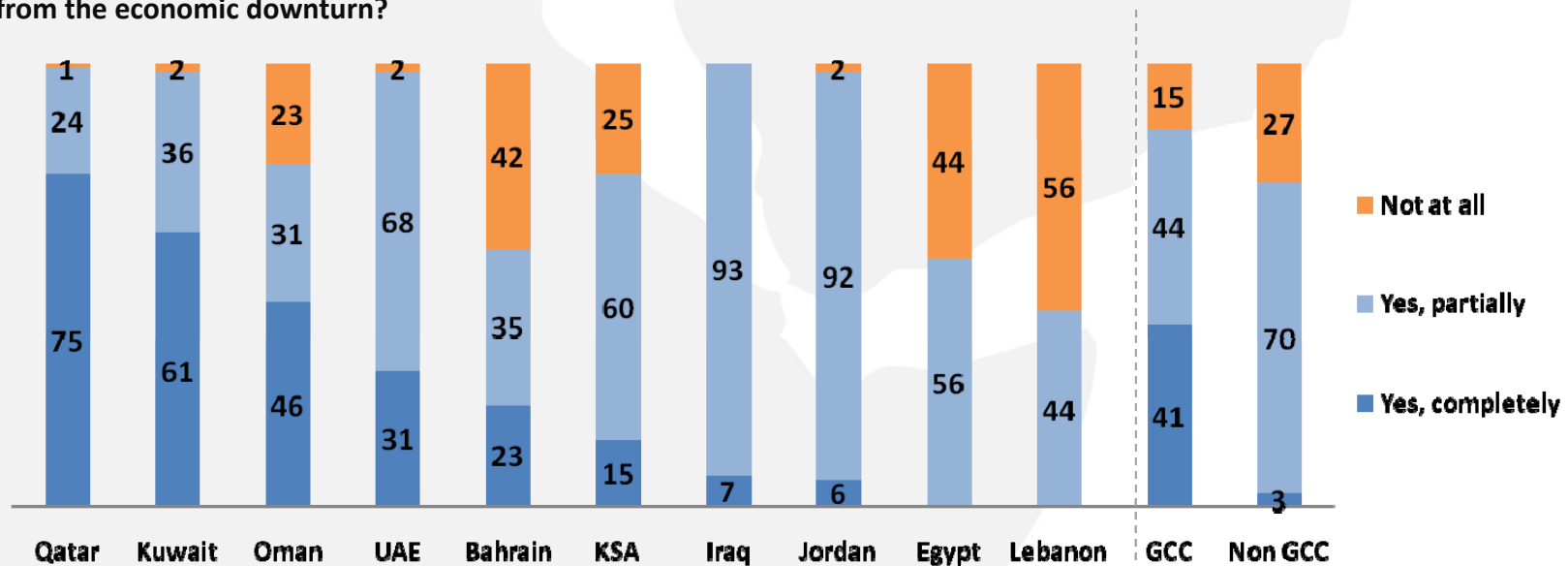




ECONOMIC RECOVERY

- In Gulf countries, there is a stronger belief that their countries have recovered from the economic crisis.
- Three quarters of young people in Qatar believe their country has completely recovered from the economic downturn. More than half feel the same in Kuwait.
- In Jordan and Iraq, over 9 in 10 say they have partially recovered, but that there is still a way to go. One year on from the Dubai World Default, one third of youth in UAE believe the country has fully recovered but two thirds believe recovery is only partial at this stage.
- Youth in Egypt and Lebanon are least positive about their country's recovery. Young people are divided between seeing a partial recovery and none at all.

Do you believe your country of residence has recovered from the economic downturn?





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

EDUCATION GAP WIDENS BETWEEN GULF STATES AND OTHER ARAB COUNTRIES



PENN
SCHOEN
BERLAND

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



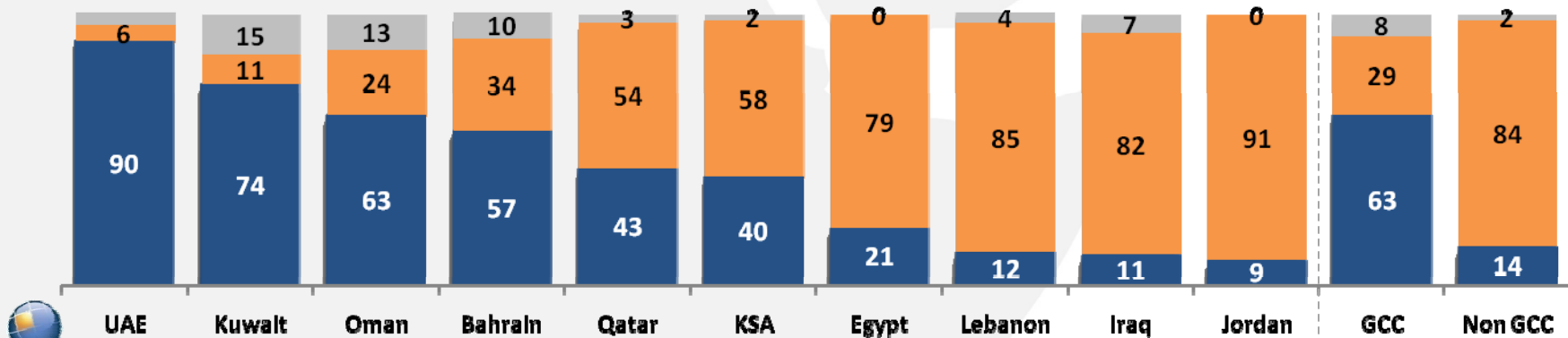
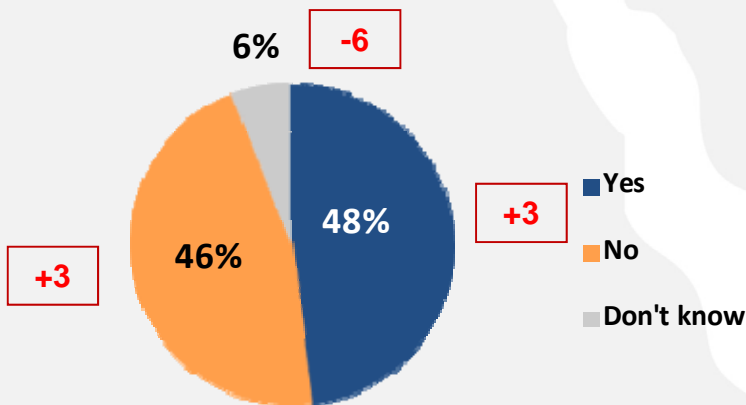
asdaa

Burson-Marsteller



EDUCATION

- There is a split among youth in the region on entering further education.
- Nine out of ten in UAE plan to go into further education in the future, while almost equal numbers in Lebanon, Iraq and Jordan do not, reflecting the split between GCC and non-GCC markets.



Red box shows change from 2009



3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

INCREASING PREFERENCE TO WORK IN PRIVATE SECTOR, EAGERNESS TO START OWN BUSINESS



BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



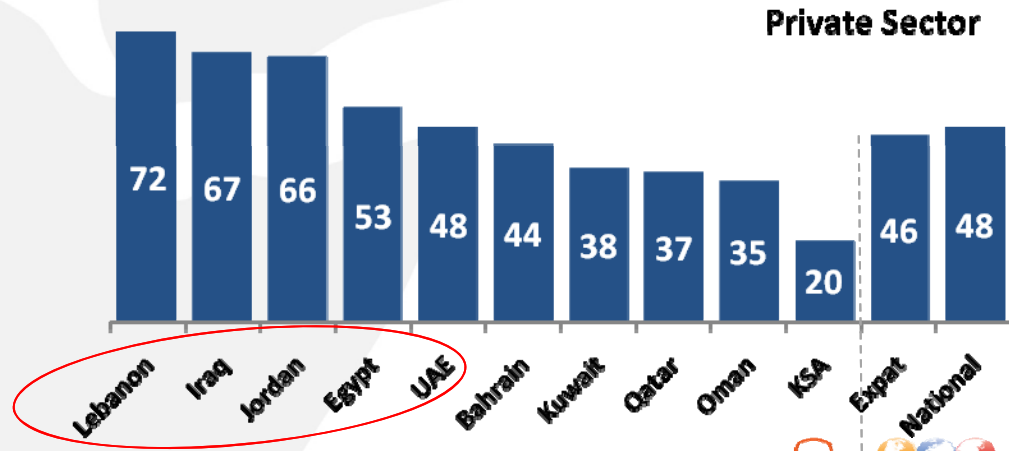
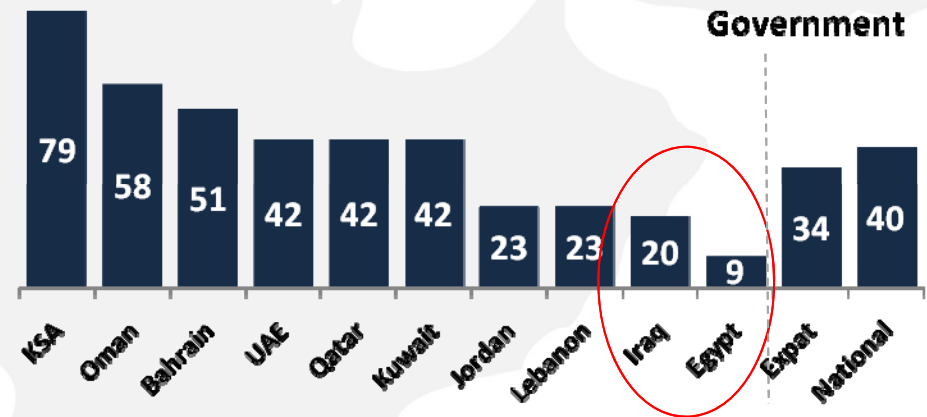
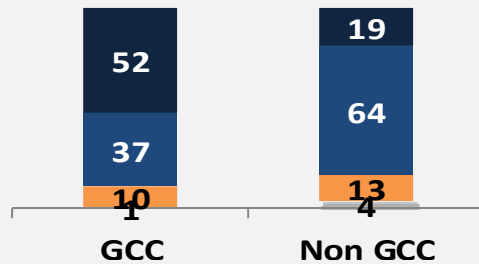
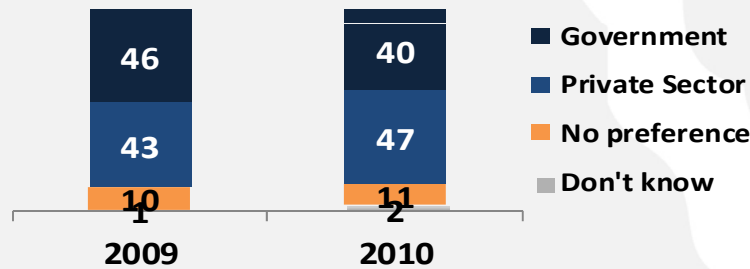


FUTURE CAREERS

- The number of young people preferring to work for the government has declined slightly this year. It is particularly low in Egypt. The private sector has appeal in Lebanon, Iraq, Jordan and Egypt.
- In the Gulf, there is a greater appeal for government jobs

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

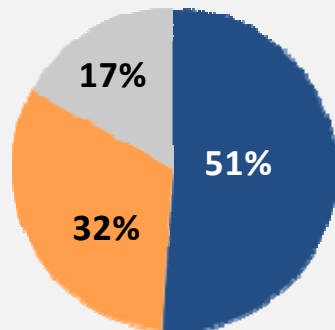
Among All





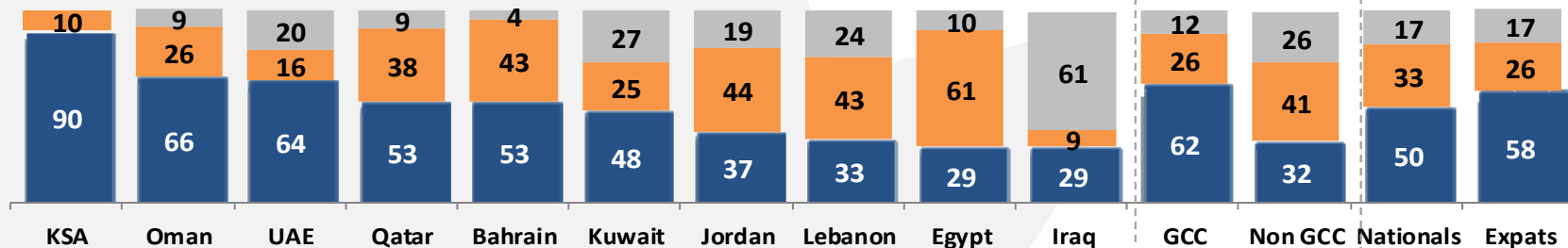
ENTREPRENEURSHIP

- Half of 18-24 years olds in the region intend to start their own business in the next five years. Primarily those in KSA, Oman and UAE carry the most entrepreneurial spirit.
- However, Egyptian youth are the least likely to see the potential of owning their own business and Iraqis are unsure of their intention, potentially as a result of the current climate.
- There is a greater interest in starting a business in GCC countries and among Expats.



Do you intend to start your own business within the next five years? Among All

- Yes
- No
- Don't know





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

INTERNET MAKES MORE INROADS, WITH SOCIAL MEDIA GROWING IN INFLUENCE



PENN
SCHOEN
BERLAND

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



asdaa

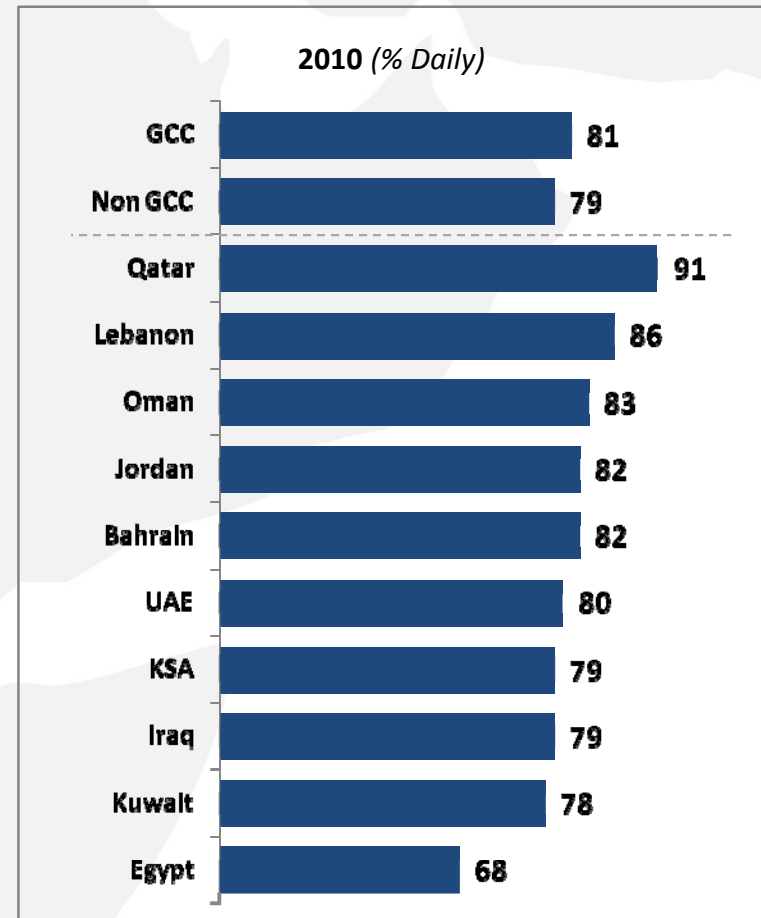
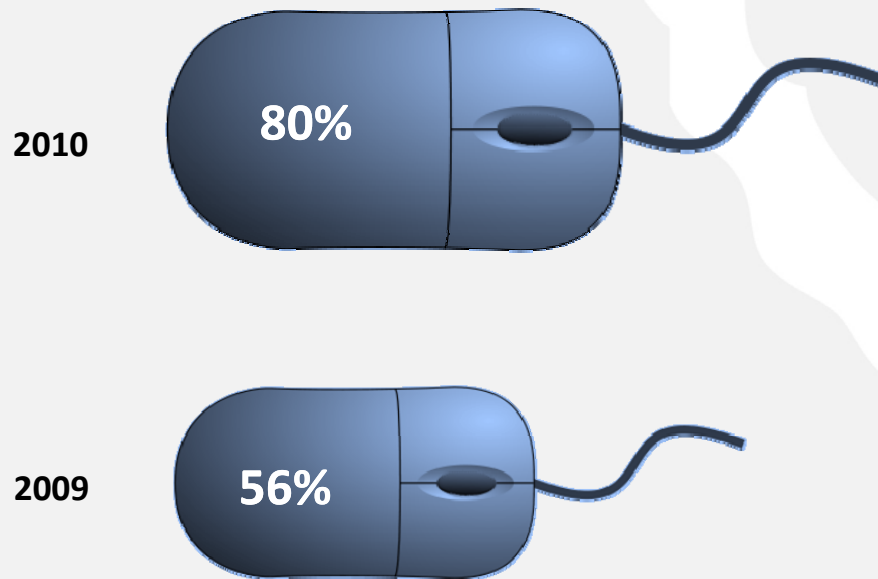
Burson-Marsteller



INTERNET USAGE

- Daily usage of the internet has grown overall this year. While under 3 in 5 used the Internet daily in 2009, now 80% use it on a daily basis.
- Internet usage is equal in GCC and non-GCC countries.

How often do you generally use the Internet?
(% Daily)
Among All

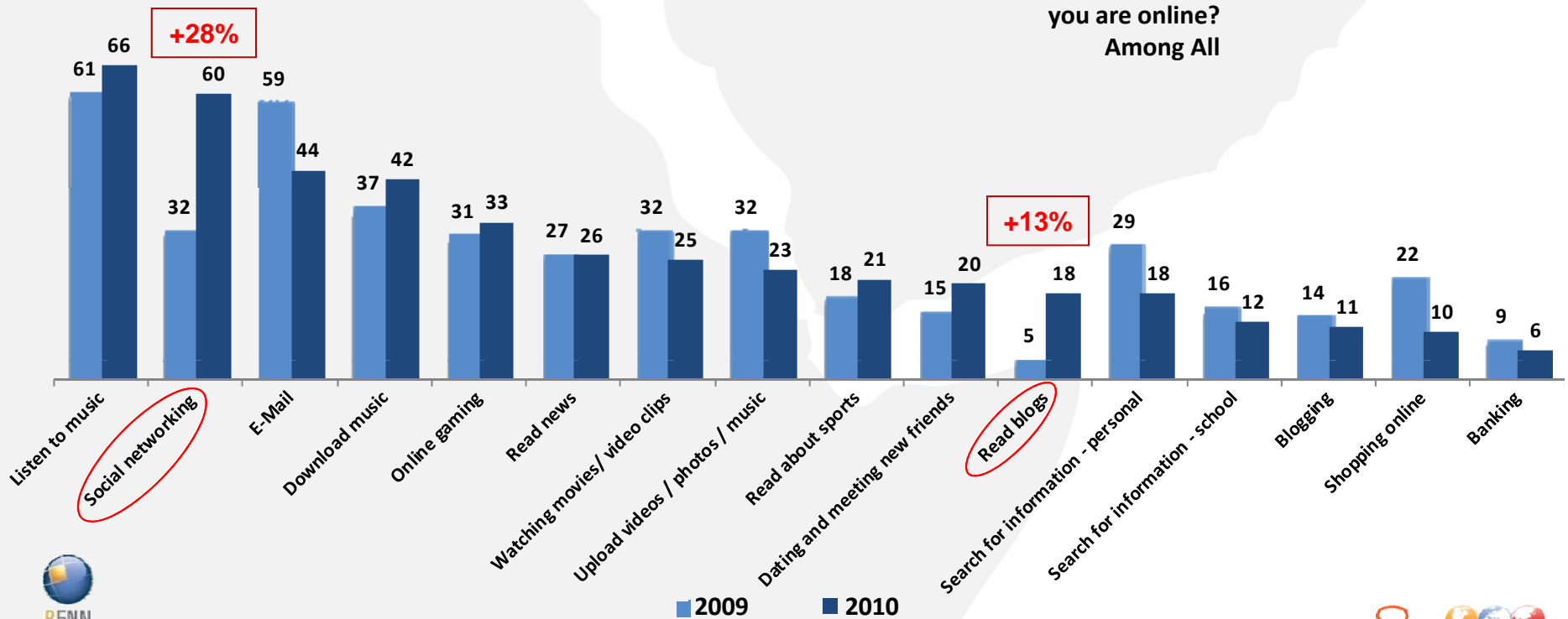




INTERNET USAGE

- The main online activities among Arab youth involve listening to music and social networking.
- Online social networking has increased by almost a third in the past 12 months and now almost one in five read blogs, reflecting the power of this medium in the region at the moment.

What do you do when you are online?
Among All



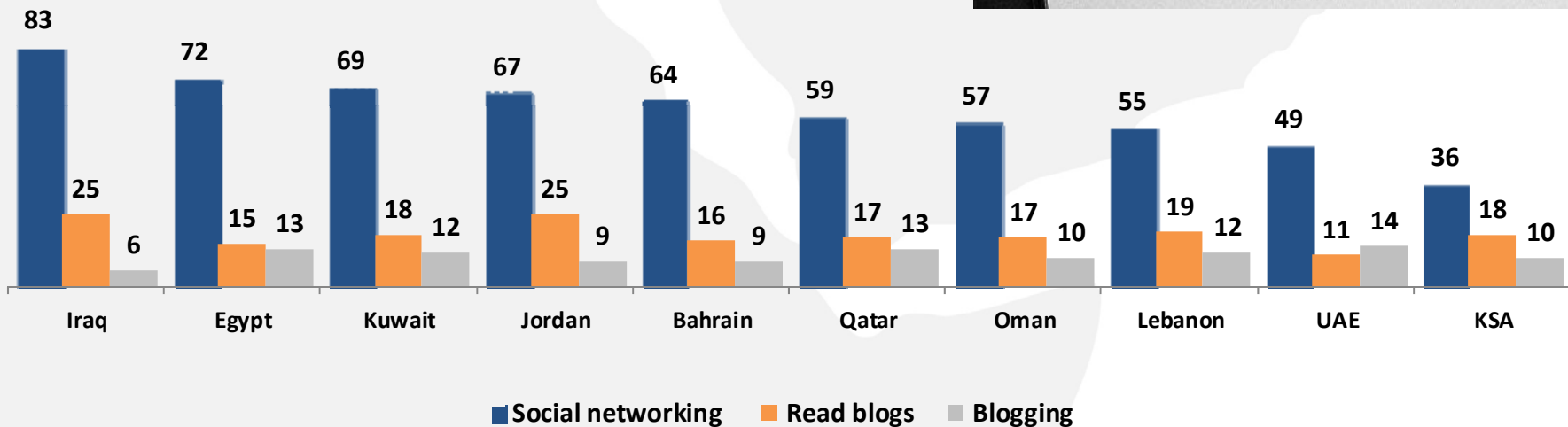


INTERNET USAGE

- Social networking is most popular in Iraq and Egypt. In Egypt this supports the widespread use of social media during the protests.



What do you do when you are online?
Among All





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

TELEVISION THE MOST POPULAR AND TRUSTED SOURCE OF NEWS



BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE

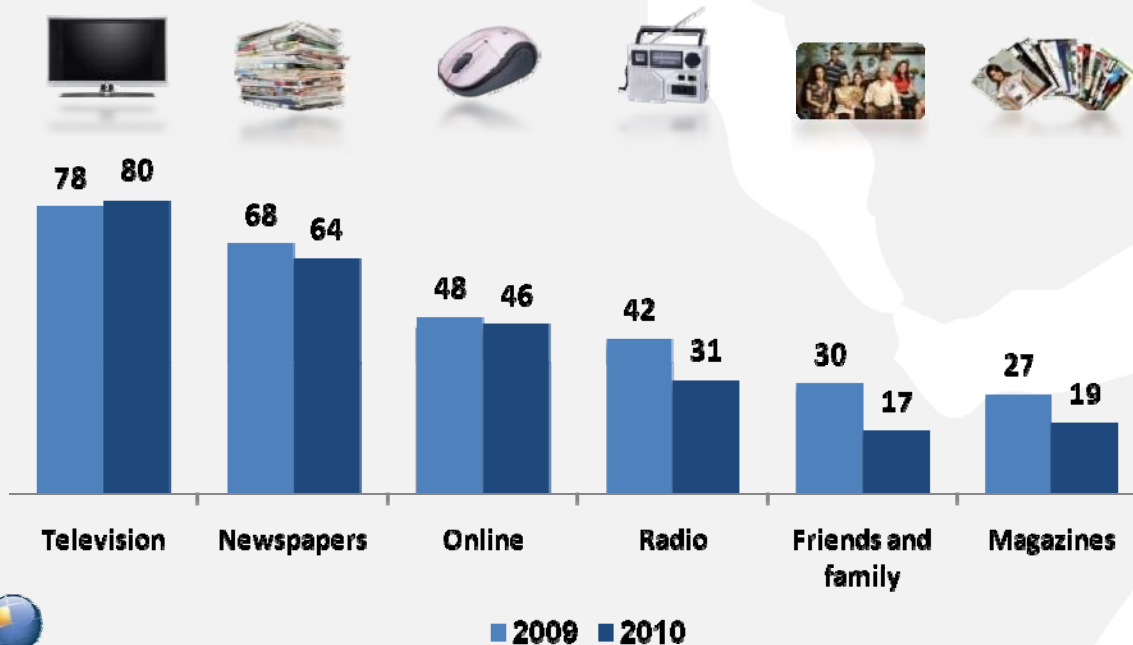




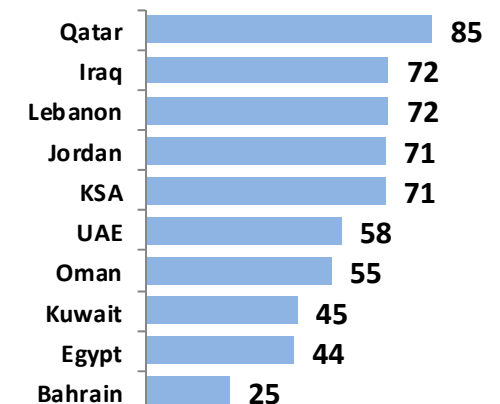
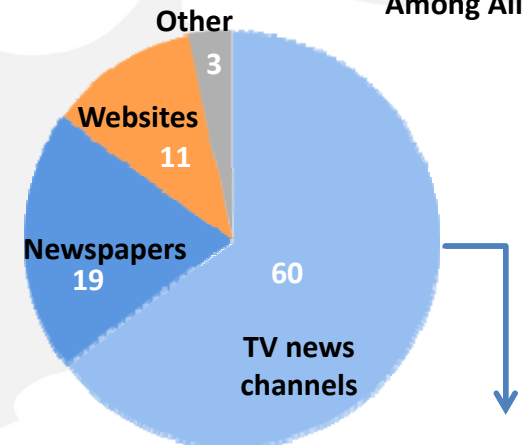
TECHNOLOGY AND INTERNET

- Television and newspapers are the most popular news sources. TV news channels are the most trusted overall, particularly in Qatar. Trust is low in Kuwait and Egypt, but lowest in Bahrain.
- Trust is highest in TV news channels, particularly in Qatar.

Where do you get your news?
Among All



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





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

TRADITIONAL VALUES ARE PARAMOUNT, WHILE PARENTS GROW IN INFLUENCE



BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



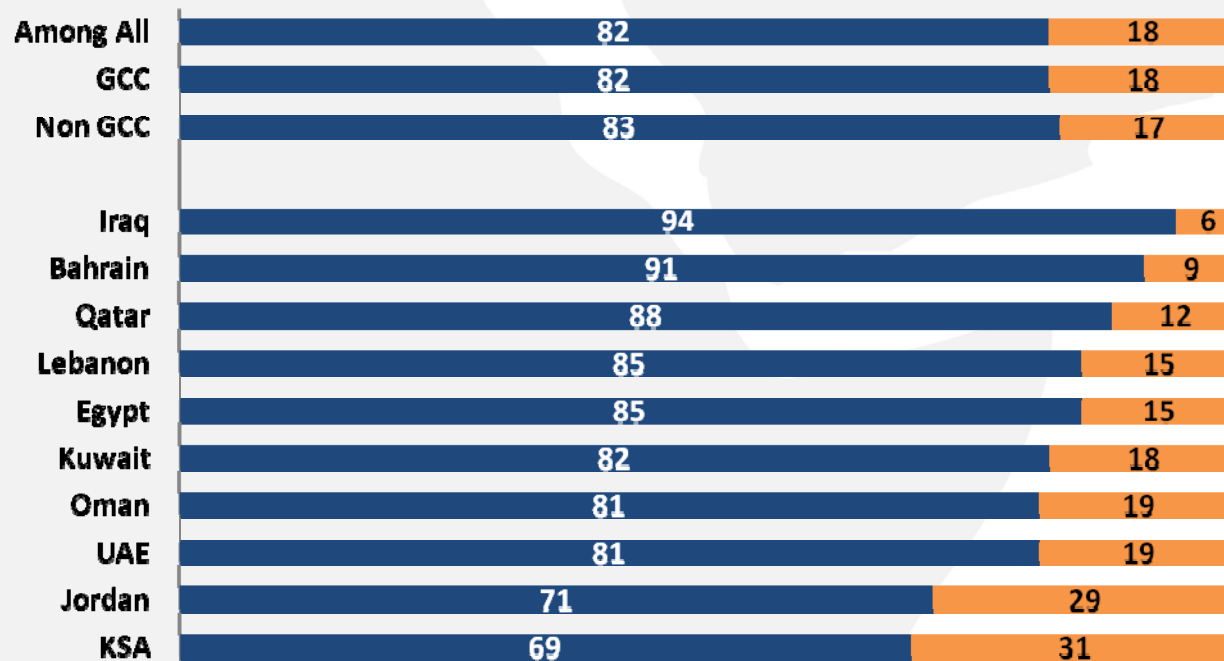


VALUES AND INFLUENCE

- Traditional values and their preservation for future generations are extremely important across the whole region, in both the GCC and non-GCC countries. The feeling is particularly acute in Iraq and Bahrain.

Which of the following is closest to your view?

- **Traditional values mean a lot to me, and ought to be preserved for generations to come.**
- **Traditional values are out-dated and belong in the past. I am keen to embrace modern values and beliefs.**

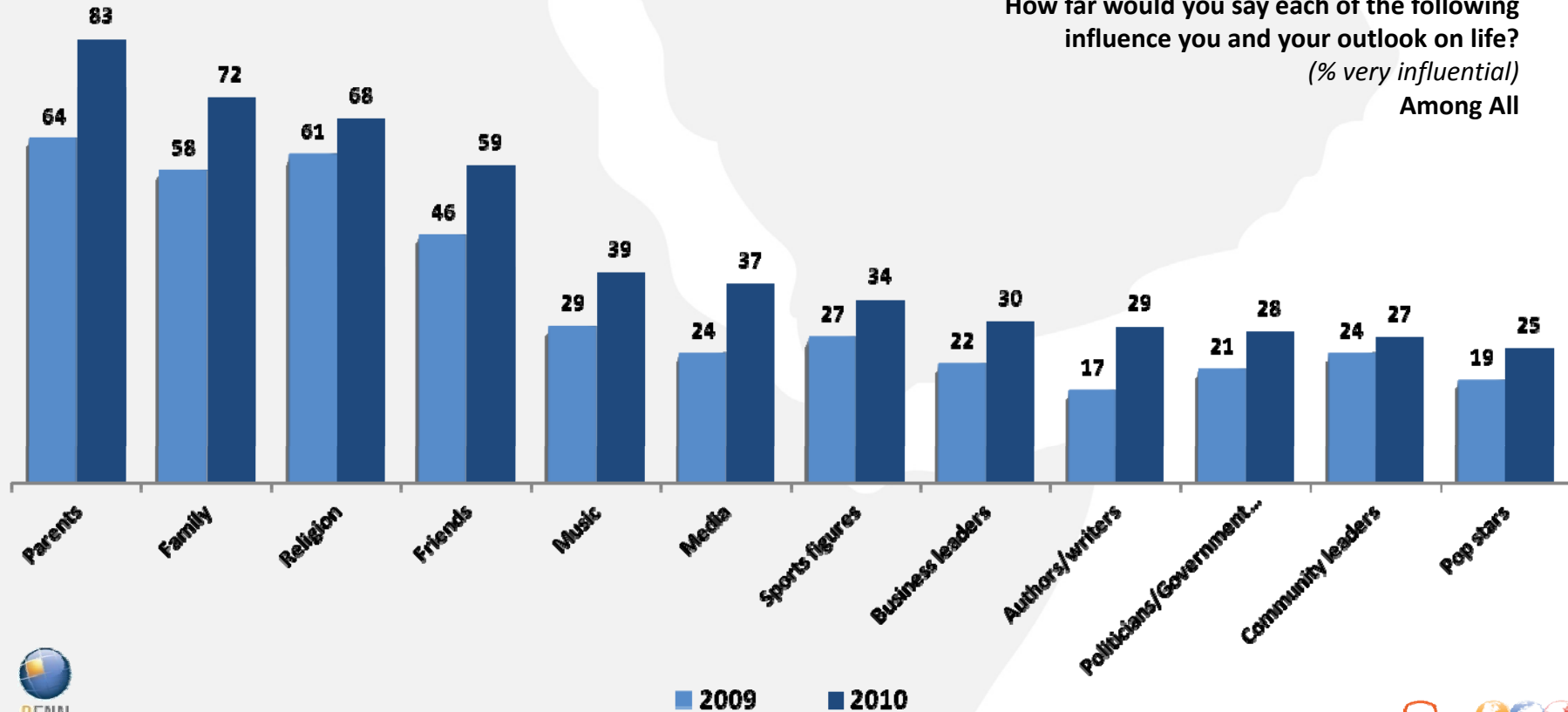




VALUES AND INFLUENCE

- Parents continue to have the most influence on life outlook for Arab youth in the region.
- Family and friends have also increased as an influence.

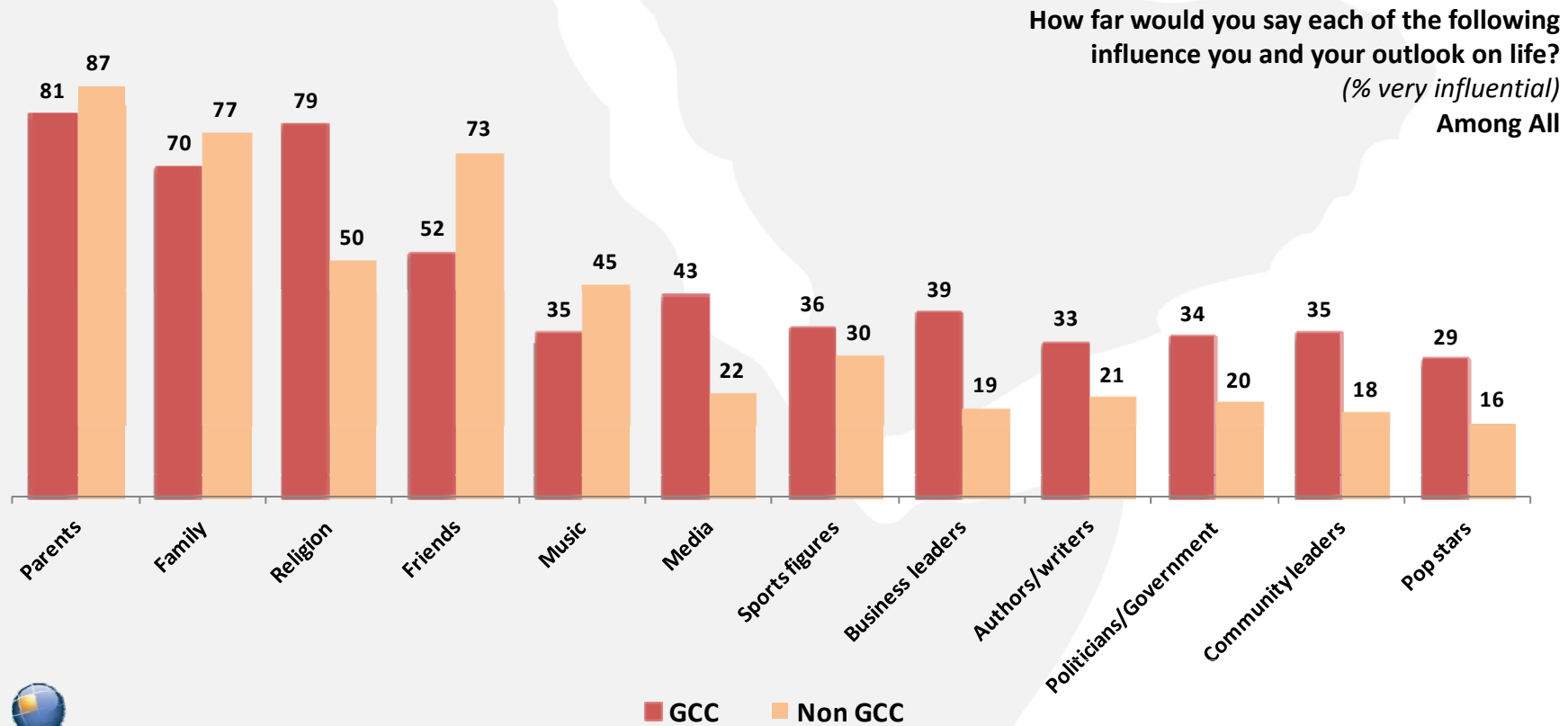
How far would you say each of the following influence you and your outlook on life?
(% very influential)
Among All





VALUES AND INFLUENCE

- Religion is more influential in GCC countries. The immediate impact of parents, family and friends has greater resonance in the non-GCC countries.





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

INCREASE IN POSITIVE PERCEPTION OF GLOBAL POWERS, GROWING SENSE OF GLOBAL CITIZENSHIP



PENN
SCHOEN
BERLAND

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



asdaa

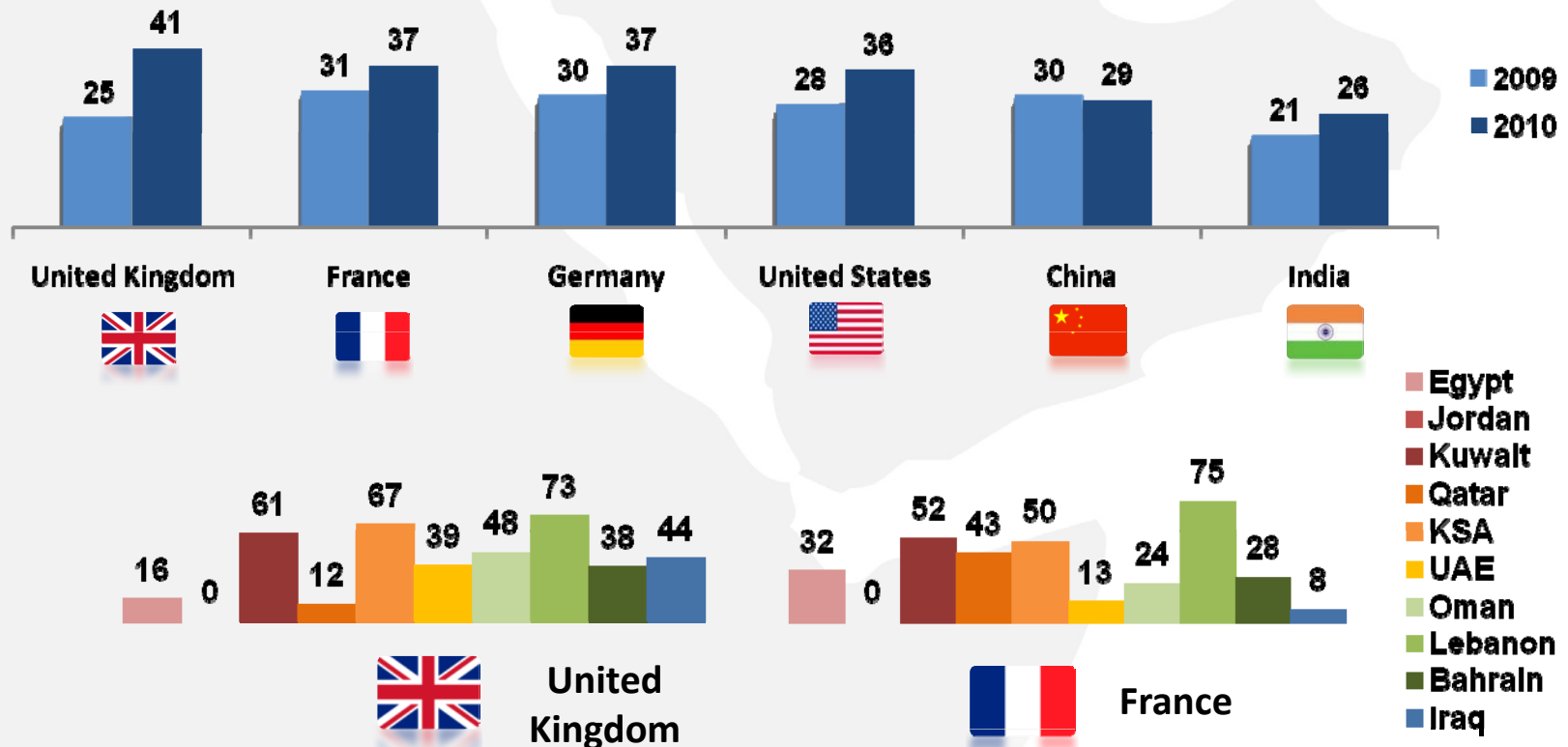
Burson-Marsteller



FOREIGN RELATIONS

- European nations like the UK, France and Germany continue to be looked on favourably, with feelings towards the US increasingly positive.

How favourable are you to the following countries?
(% Very favourable)

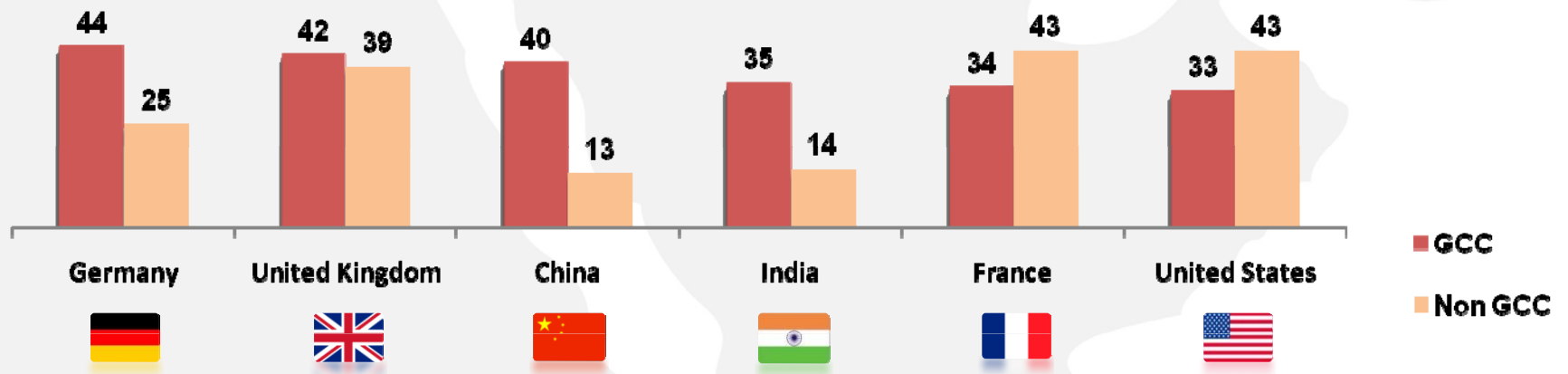




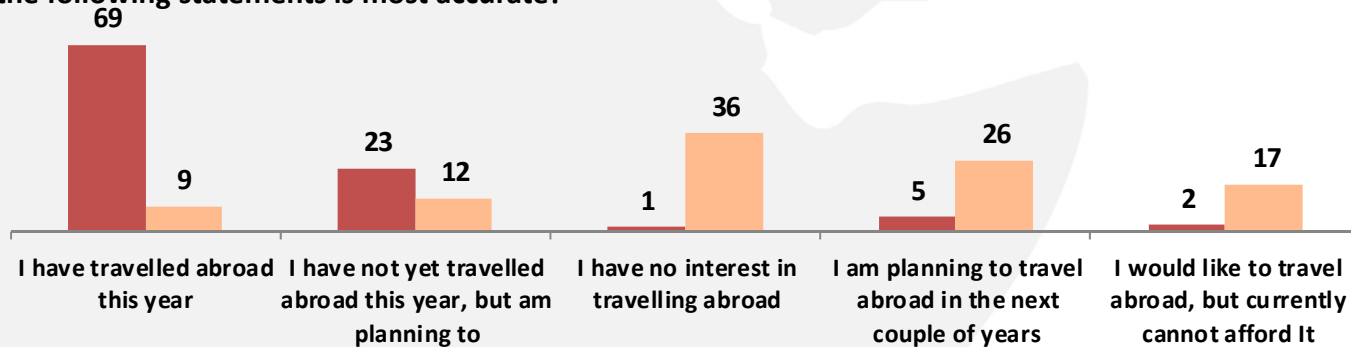
FOREIGN RELATIONS

- European nations like the UK, France and Germany continue to be looked on favourably, with feelings towards the US increasingly positive.

How favourable are you to the following countries?
(% Very favourable)



Which of the following statements is most accurate?

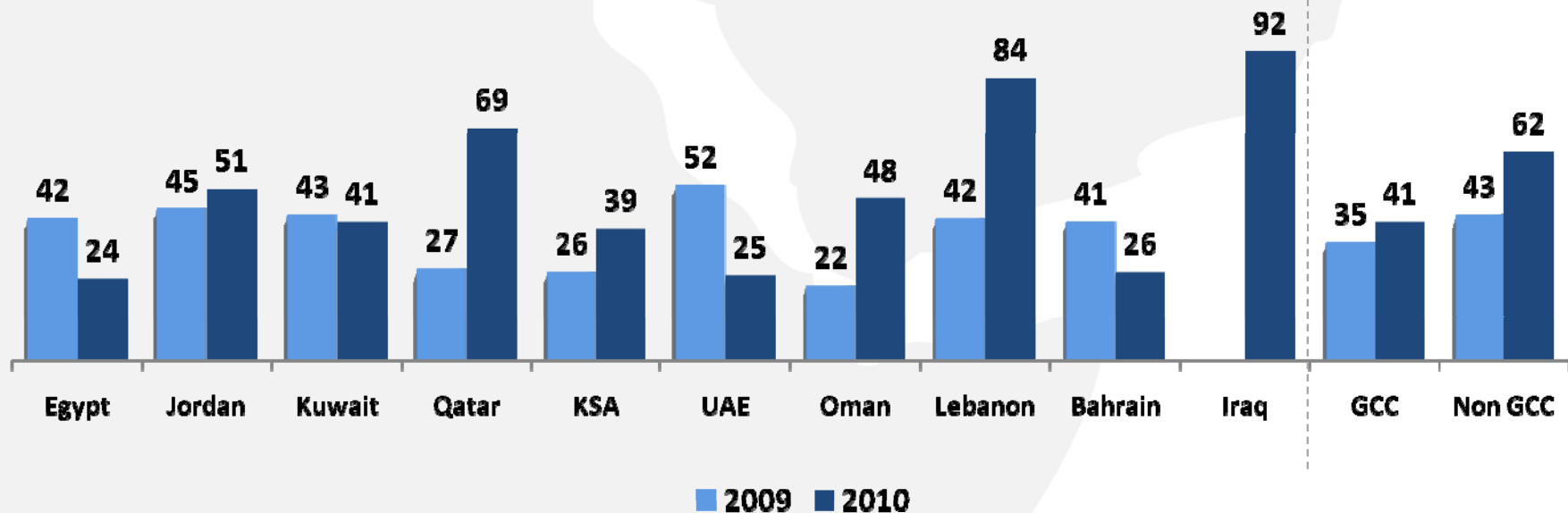




GLOBAL CITIZENSHIP

- The concept of global citizenship is increasingly important for many 18-24 year olds in the region, particularly in Lebanon, Qatar, Oman and Iraq.
- UAE, Bahrain and Egypt place less importance on the notion in comparison to last year.
- Non GCC countries are more committed to the idea of global citizenship.

How important is the idea of global citizenship -
*the shared feeling of identity regardless of ethnic,
religious or national background* - to you?
(% very important)

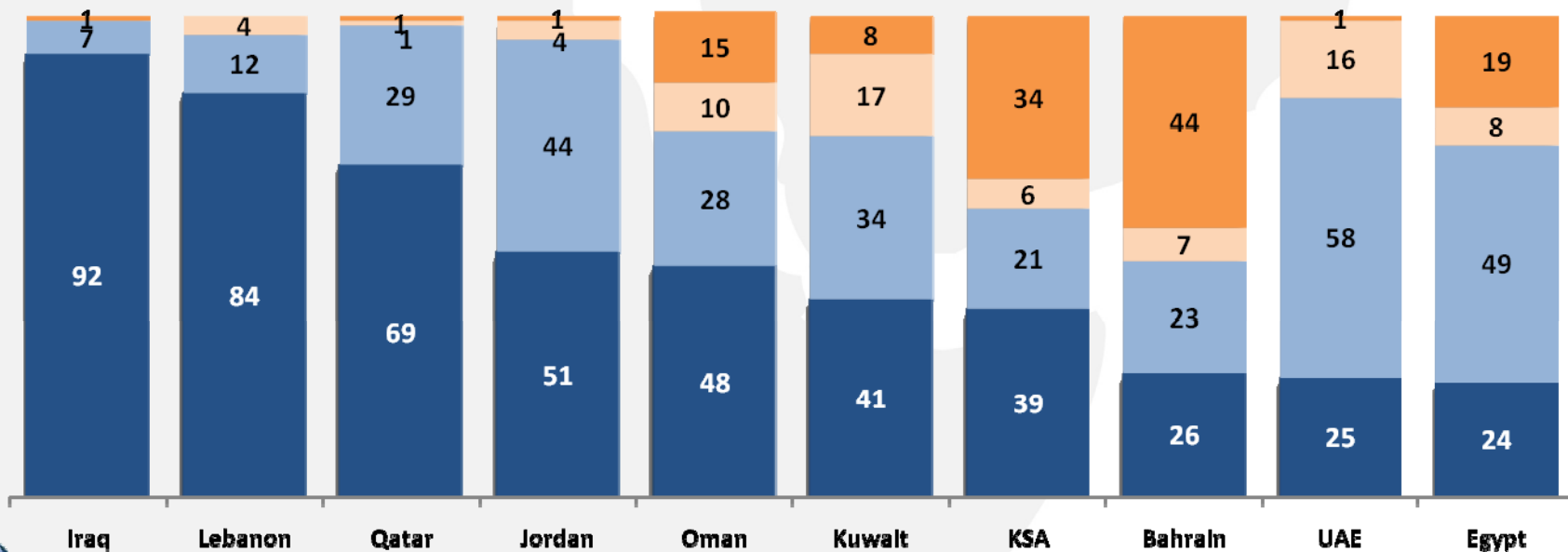
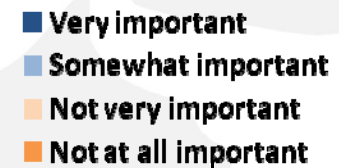




GLOBAL CITIZENSHIP

- Global citizenship is less important in Bahrain and KSA. Just under half of young people in Bahrain consider the idea to be important – the lowest number in the region.

How important is the idea of global citizenship -
*the shared feeling of identity regardless of ethnic,
religious or national background* - to you?
(% very important)





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

UPDATE: POST-PROTEST INSIGHTS



PENN
SCHOEN
BERLAND

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE





TOP 5 FINDINGS

1. Importance of democracy is greater than ever – but so is desire for stability
2. Concern about the cost of living, and corruption, continues to escalate
3. Increased frustration with domestic status quo
4. Support of the protests is high, and so is belief in their positive impact
5. Political views are increasingly liberal and forward-looking

Methodology: Following unrest in the Middle East in January 2011, Penn Schoen Berland (PSB) conducted an additional 500 interviews in Egypt, Jordan, Lebanon, Bahrain and Iraq. Interviews were conducted among Arab national youth aged 18-24. Fieldwork was conducted between February 26-March 5, 2011, in capital cities.



3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

IMPORTANCE OF DEMOCRACY IS GREATER THAN EVER – BUT SO IS DESIRE FOR STABILITY



PENN
SCHOEN
BERLAND

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



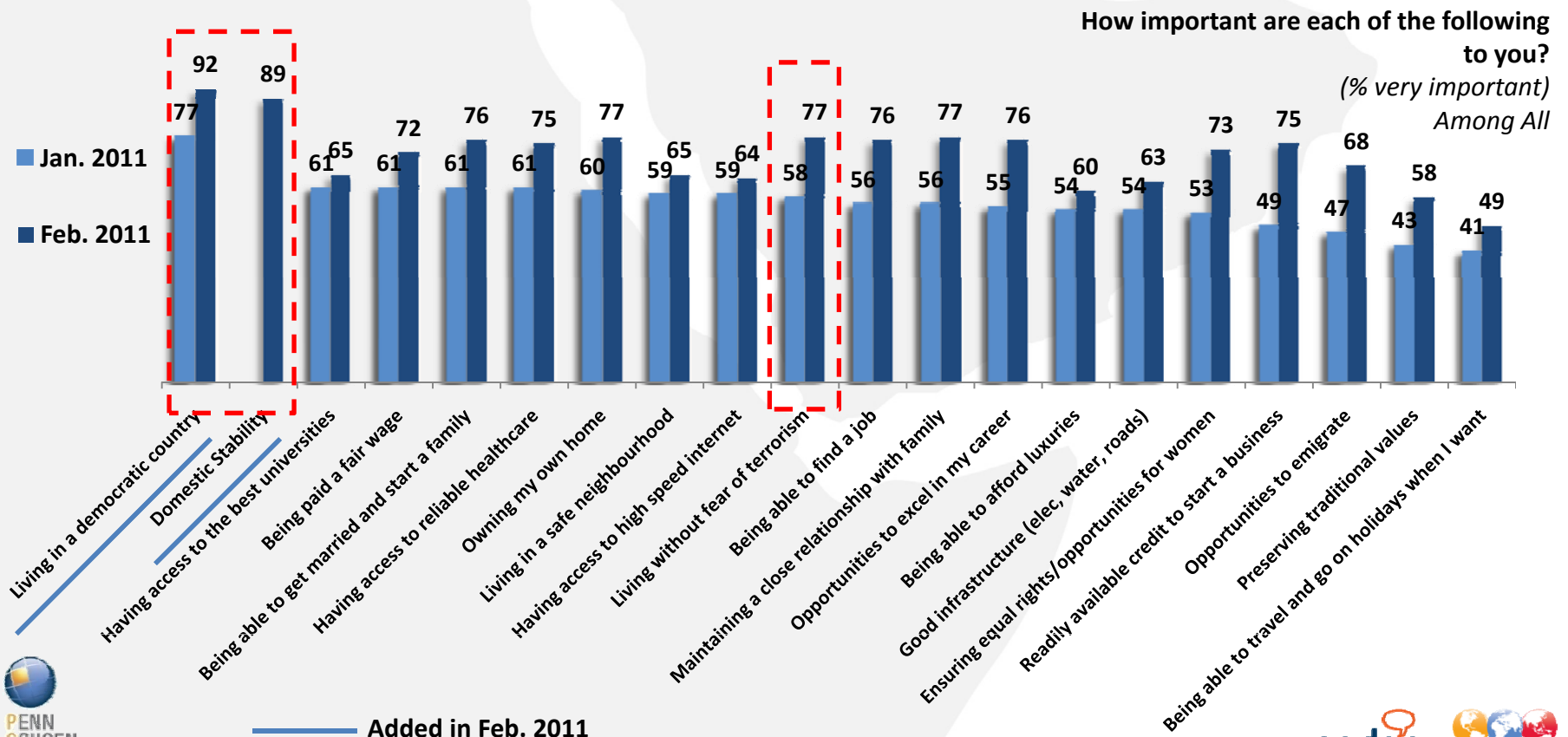
asdaa

Burson-Marsteller



MOST IMPORTANT

- It is clear that living in a democratic country and domestic stability are important to young people. Living without fear of terrorism has grown in importance.
- While political issues are salient, there has been a growing importance of fundamental issues like family, being able to find a job, and having access to credit.





MOST IMPORTANT

How important are each of the following to you?	Egypt	Jordan	Lebanon	Bahrain	Iraq
Living in a democratic country	92	90	100	89	89
Domestic Stability	89	100	100	88	100
Having access to the best universities	55	85	70	47	74
Being paid a fair wage	86	69	75	57	70
Being able to get married and start a family	84	89	82	53	79
Having access to reliable healthcare	95	86	81	48	61
Owning my own home	83	96	82	58	68
Living in a safe neighbourhood	78	65	65	55	59
Having access to high speed internet	55	86	75	55	70
Living without fear of terrorism	81	89	80	53	76
Being able to find a job	86	84	83	65	61
Maintaining a close relationship with my family	84	90	95	55	69
Having the opportunities to excel in my career	71	85	86	47	75
Being able to afford luxuries	39	70	69	48	74
Having good infrastructure like electricity, clean water, safe roads	79	68	54	42	70
Ensuring equal rights/opportunities for women	80	87	73	52	73
Readily available credit from banks to start a business	68	90	90	38	71
Opportunities to emigrate	62	79	88	33	72
Preserving traditional values	52	72	49	55	60
Being able to travel and go on holidays when I want	37	66	47	35	62



3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

CONCERN ABOUT THE COST OF LIVING, AND CORRUPTION, CONTINUES TO ESCALATE



PENN
SCHOEN
BERLAND

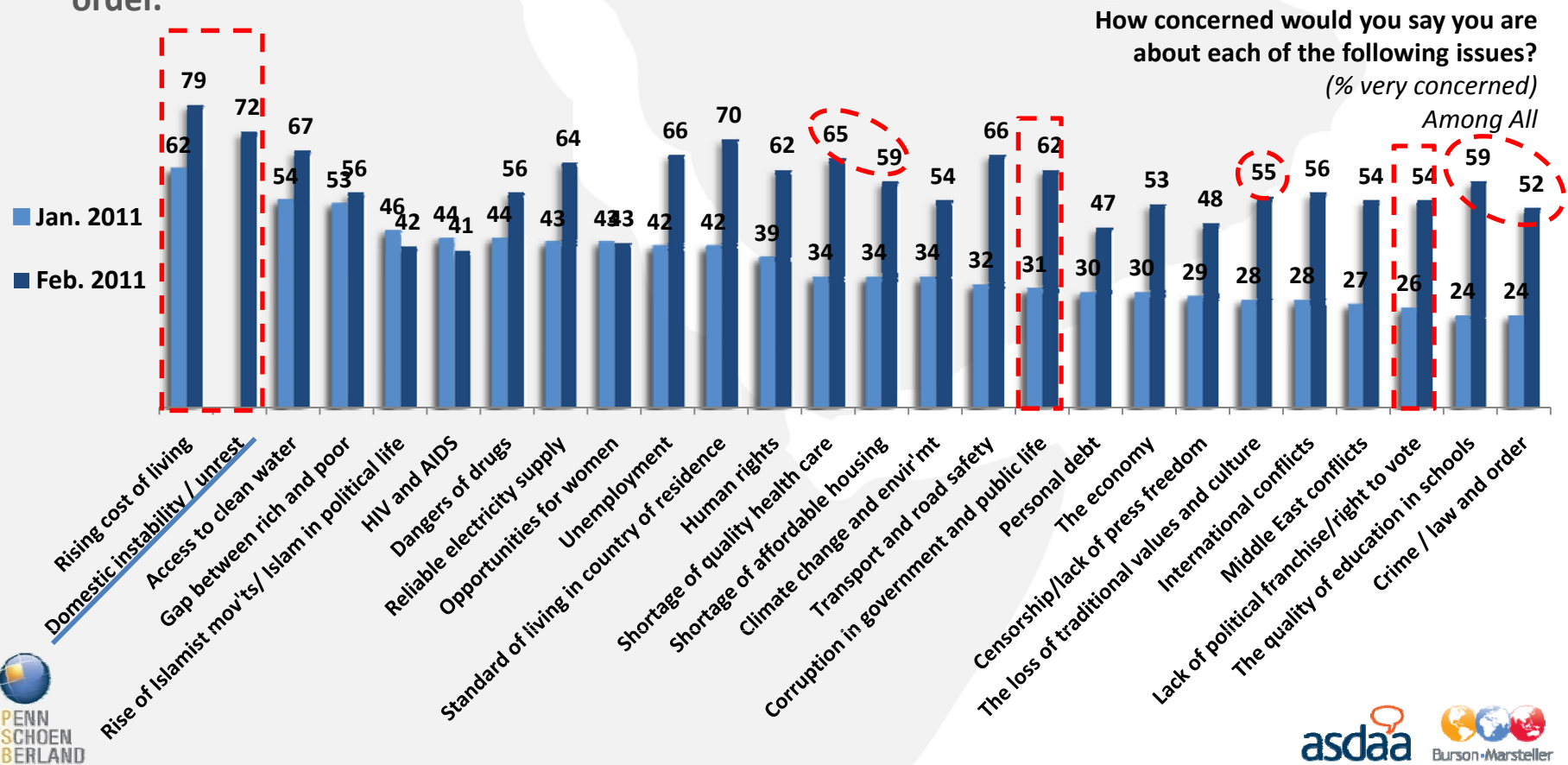
BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE





CONCERNS FOR 2011

- Unsurprisingly, political and economic issues are a growing concern for young people. Increasingly corruption in government and lack of political franchise are a concern. Nevertheless, a desire to preserve traditional values endures.
- Since January, there has been an increase in concerns about healthcare, housing and law and order.





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

INCREASED FRUSTRATION WITH DOMESTIC STATUS QUO



PENN
SCHOEN
BERLAND

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



asdaa

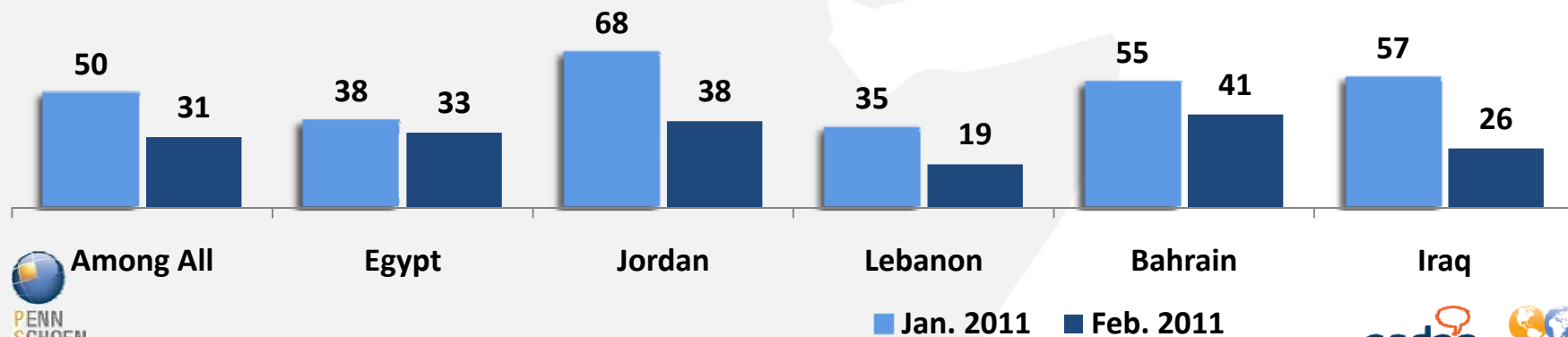
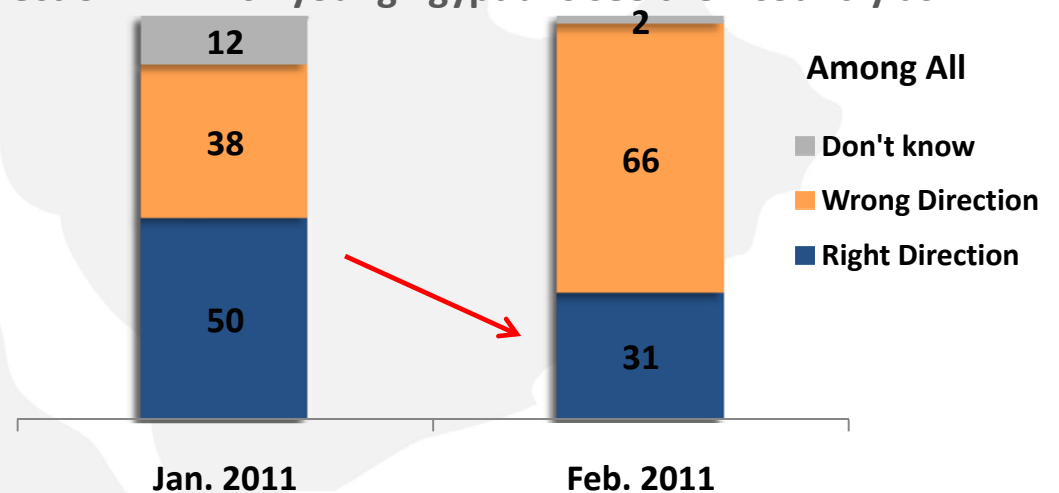
Burson-Marsteller



COUNTRY'S DIRECTION

- Currently, there is a belief that their country of residence is heading in the wrong direction, with a sharp decline in Jordan, Lebanon, Bahrain and Iraq among those who see the country as heading in the right direction.
- There has been little change in the direction in which young Egyptians see their country as heading.

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?
% Right direction

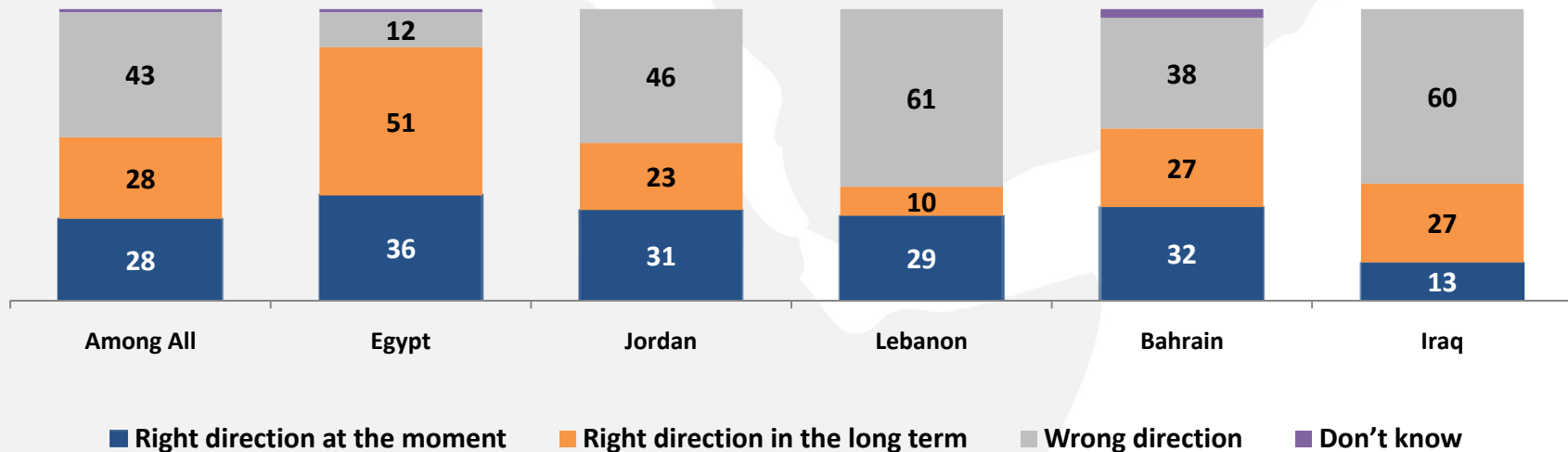




COUNTRY'S DIRECTION

- Egyptians are most likely to see their country heading in the right direction in the long term, potentially reflecting the time that has elapsed since the large-scale protests.

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





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

SUPPORT OF PROTESTS IS HIGH, AND SO IS BELIEF IN THEIR POSITIVE IMPACT



BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE

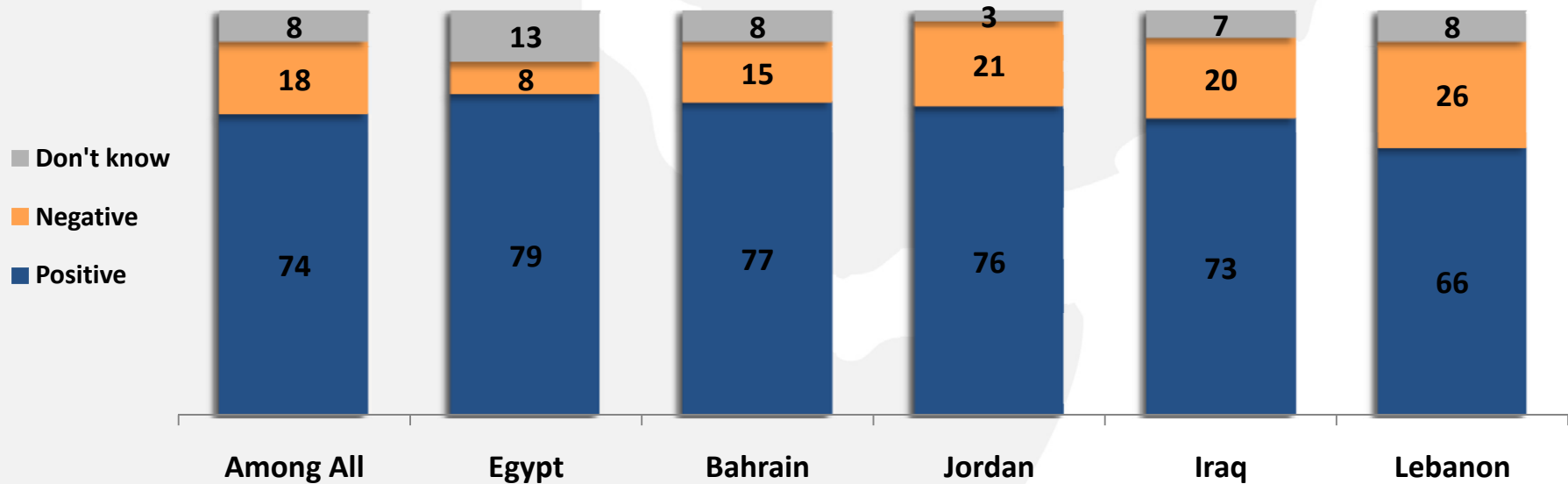




IMPACT OF PROTESTS

- Three in four see the protests as having a positive impact in the lives of the people. Young people in Egypt are the most positive, and least negative overall.

Do you believe these protests will have a positive or negative impact in the lives of the people in your country?



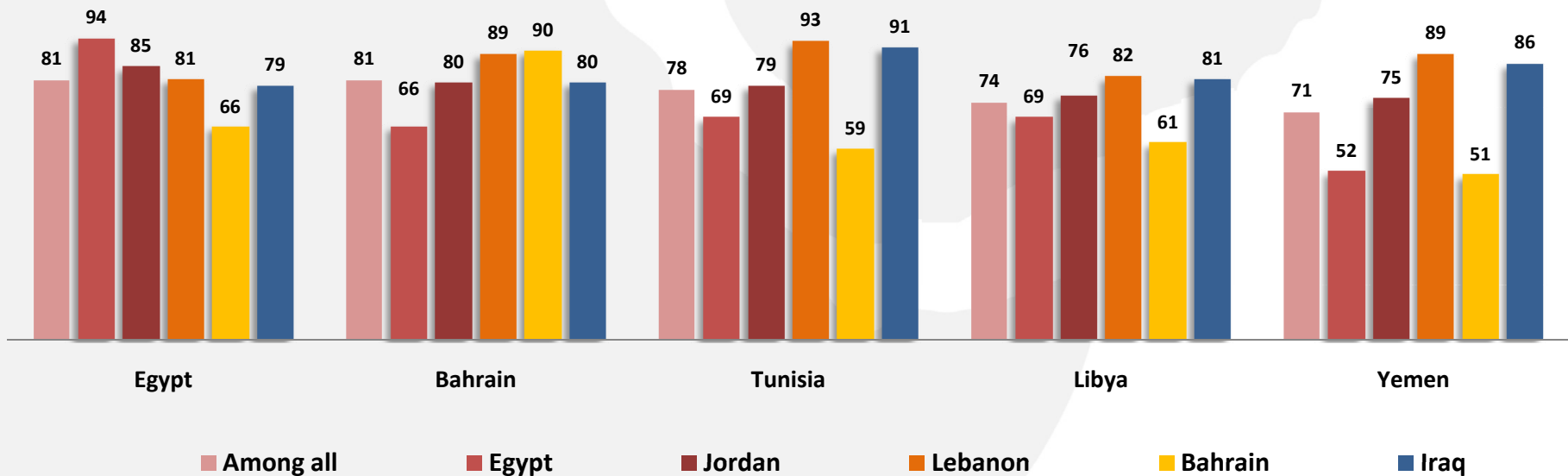


SUPPORT OF THE PROTESTS

- Young people are supportive of the protests in all the regions. Support is lowest among youth in Bahrain, where they support the protests in their own countries, but are less supportive of others.
- Support overall is lowest regarding events in Yemen.

How much do you support or not support the protests in..?

Very supportive

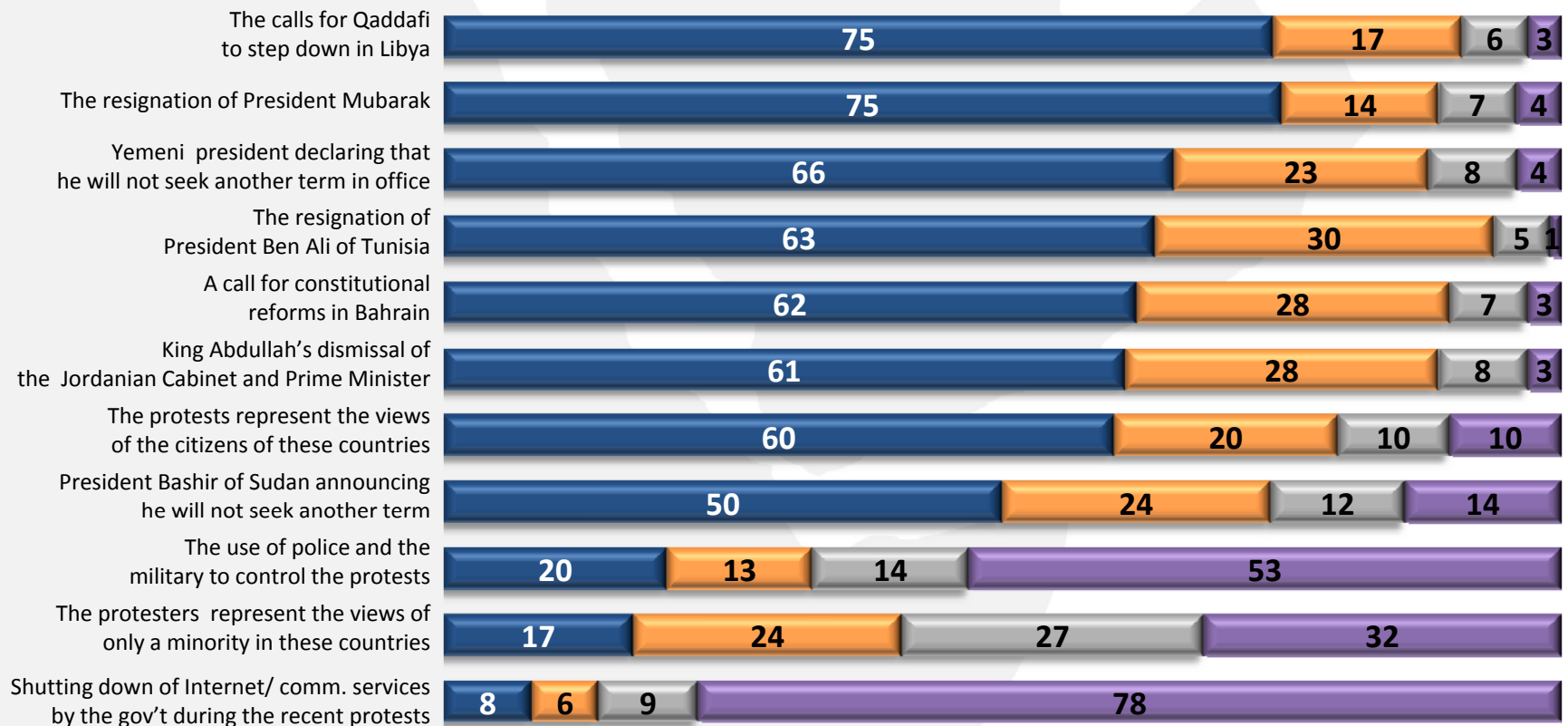




SUPPORT OF THE PROTESTS

- Greatest agreement is for the stepping down of political leaders.
- Strongest disagreement comes from the shutting down of the internet and communications services during the protests, and the use of military to control them.

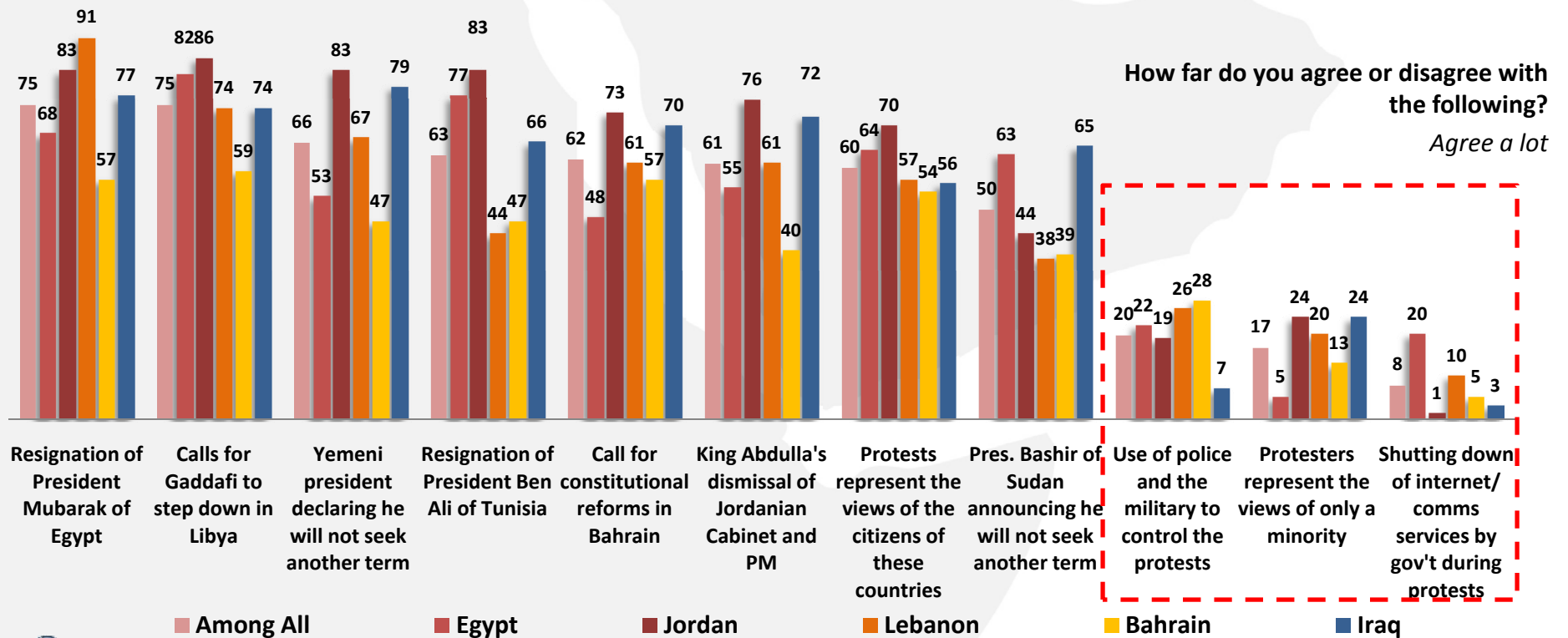
Do you believe these protests will have a positive impact on the lives of the people in your country?





SUPPORT OF PROTESTS

- It is clear that young people are supportive of the resignation of Mubarak, Gaddafi, the Yemeni President, and Ben Ali, and they see the protests as representing the views of the people. In Bahrain, this support is less pronounced.

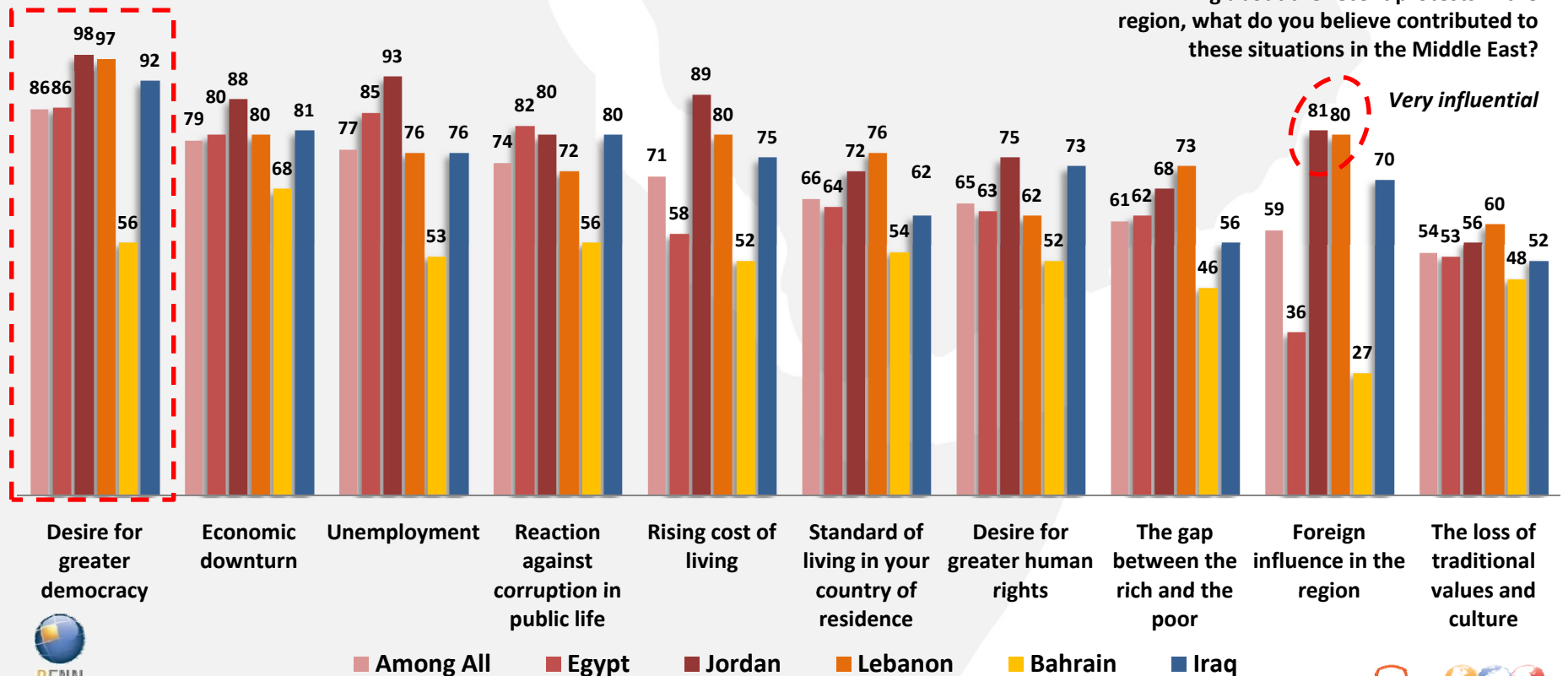




CAUSE OF PROTESTS

- The desire for greater democracy is seen as the biggest contributing factor to the protests overall, and in Egypt, Jordan and Iraq. In Bahrain, in particular, the economic downturn is a cause, though economic issues resonate across all markets.
- In Jordan and Lebanon, foreign influence in the region is seen to have been impactful.

Thinking about the recent protests in the region, what do you believe contributed to these situations in the Middle East?

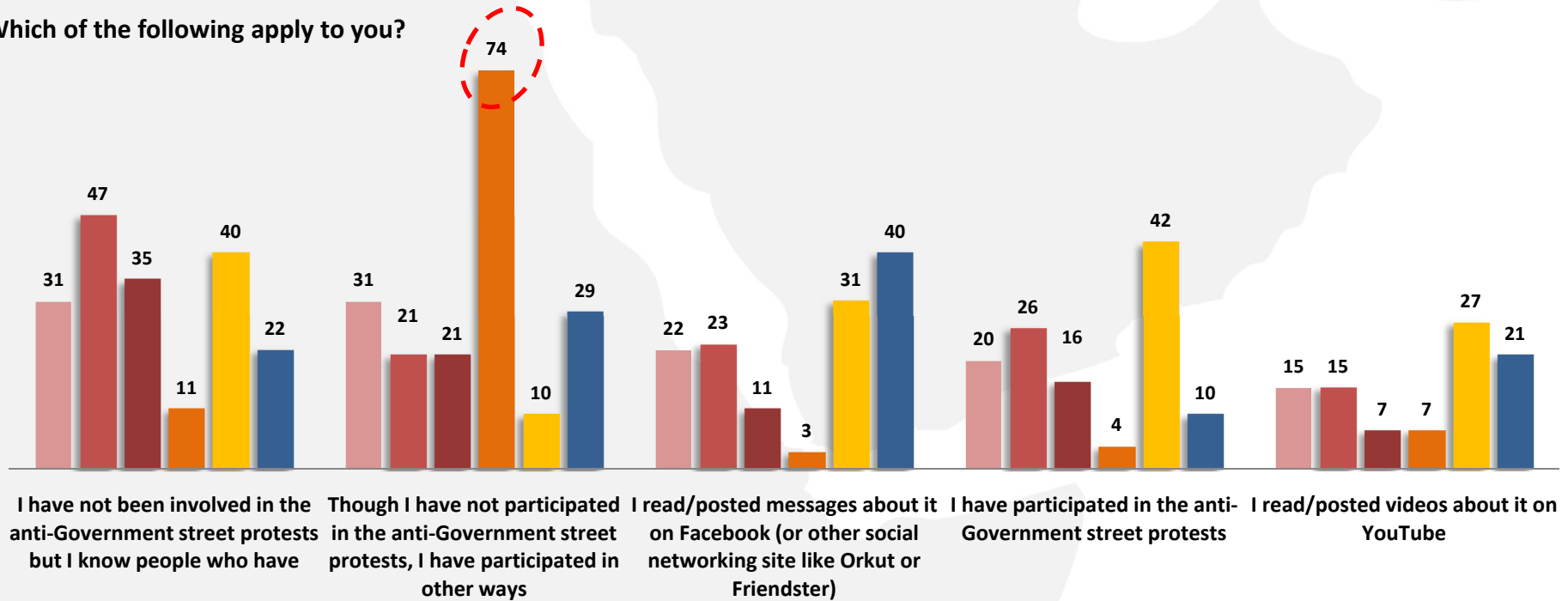




ROLE IN PROTESTS

- The majority have not participated in anti-Government protests, but they either know people who have or have participated in other ways.

Which of the following apply to you?





3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey

POLITICAL VIEWS ARE INCREASINGLY LIBERAL AND FORWARD-LOOKING



PENN
SCHOEN
BERLAND

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



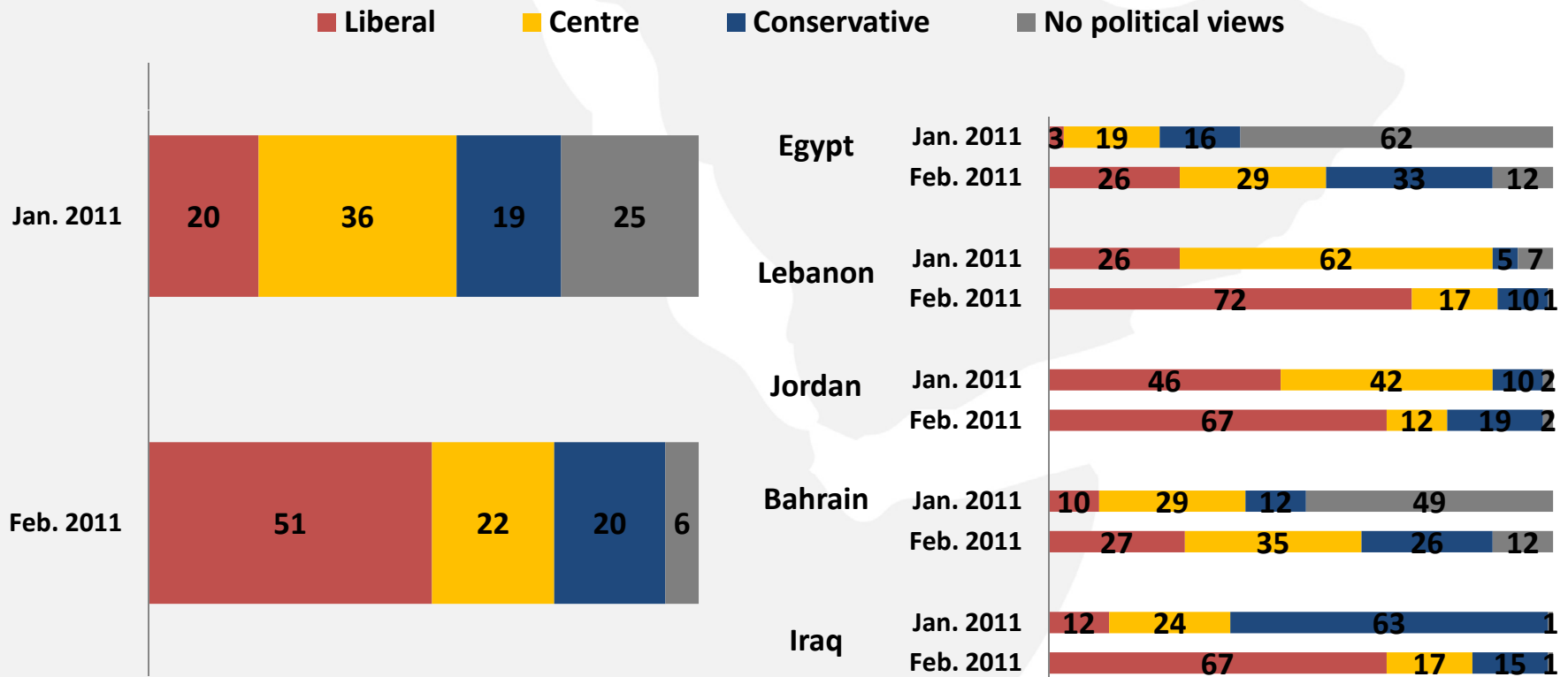
asdaa

Burson-Marsteller



POLITICAL VIEWS

- Young people have become increasingly politicised since the unrest. They are either increasingly liberal in their outlook, or less apathetic.



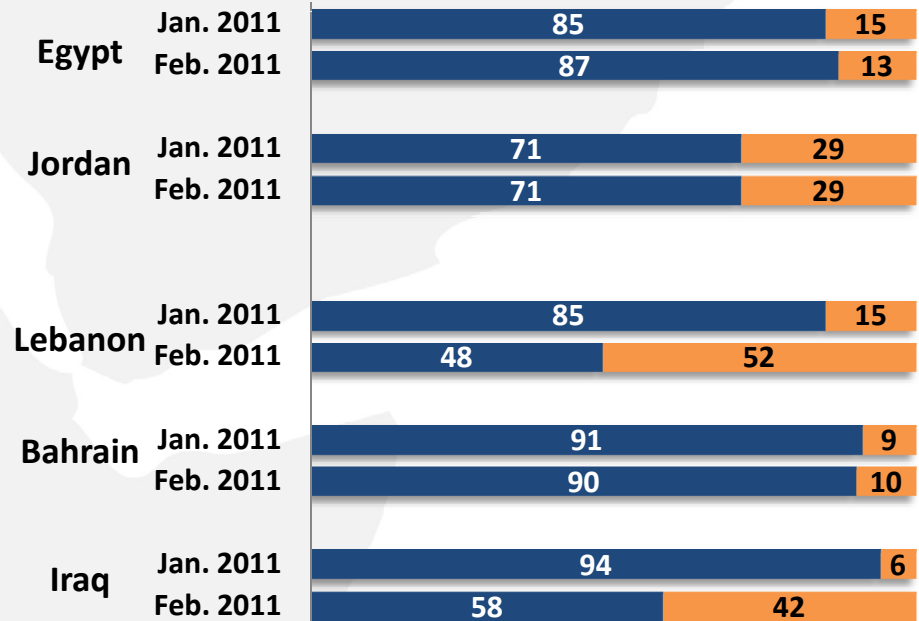
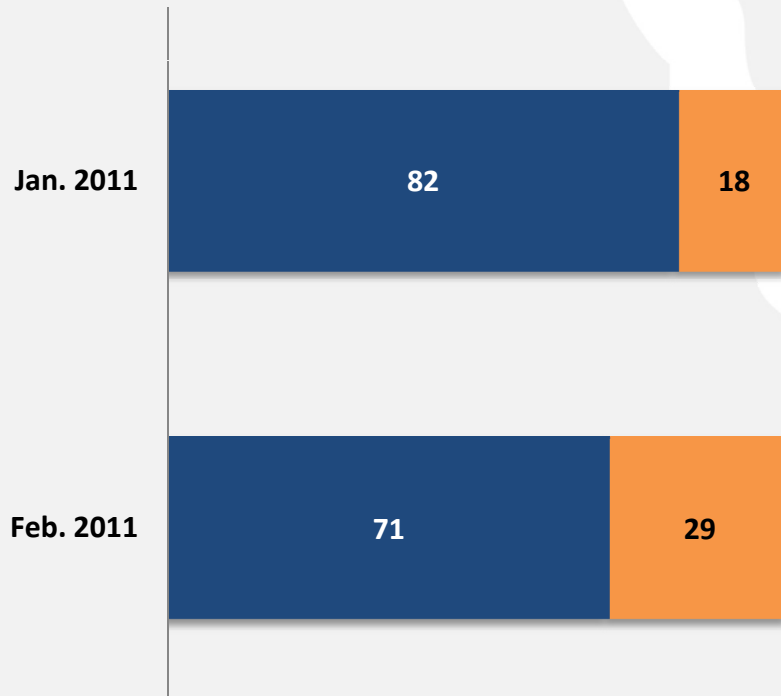


TRADITIONAL VALUES

- Traditional values endure, but there has been a movement toward embracing modern values and beliefs. This is particularly acute in Lebanon and Iraq.

■ Traditional values mean a lot to me, and ought to be preserved for generations to come.

■ Traditional values are out-dated and belong in the past. I am keen to embrace modern values and beliefs.





SUMMARY: TOP FINDINGS

2010

1. An enduring desire for democracy
2. Anxiety grows about rising cost of living
3. Gap between rich & poor of increasing concern
4. Less optimism about economic recovery and future outlook
5. Education gap widens between Gulf states and other Arab countries
6. Increasing preference to work in private sector, eagerness to start own business
7. Internet makes more inroads, with social media growing in influence
8. Television the most popular and trusted source of news
9. Traditional values are paramount, while parents grow in influence
10. More positive perceptions of global powers, growing sense of global citizenship

2011

1. Importance of democracy is greater than ever – but so is desire for stability
2. Concern about the cost of living, and corruption, continues to escalate
3. Increased frustration with domestic status quo
4. Support of the protests is high, and so is belief in their positive impact
5. Political views are increasingly liberal and forward-looking



3rd Annual
ASDA'A Burson-Marsteller
Arab Youth Survey
March 15, 2011

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE



www.arabyouthsurvey.com | www.asdaa.com