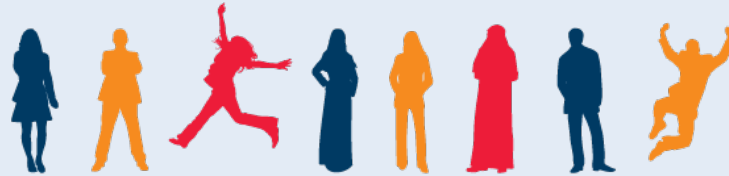


After the Spring

ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2012

May 2, 2012

www.arabyouthsurvey.com

Bahrain | Egypt | Iraq | Jordan | Kuwait | Lebanon | Libya | Oman | Qatar | Saudi Arabia | Tunisia | UAE

Objectives

ASDA'A Burson-Marsteller commissioned Penn Schoen Berland (PSB) to carry out the survey among Arab national youth aged 18-24 in 12 Middle East countries: the six countries of the Gulf Cooperation Council (Saudi Arabia, the UAE, Qatar, Bahrain, Qatar and Kuwait), Jordan, Lebanon, Egypt, Iraq and, for the first time, Libya and Tunisia.

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

- Views of the impact of the Arab Spring
- Economic and social concerns
- Attitudes towards democracy
- Views of foreign nations
- Personal and social values
- Media consumption trends
- Social media habits



Methodology

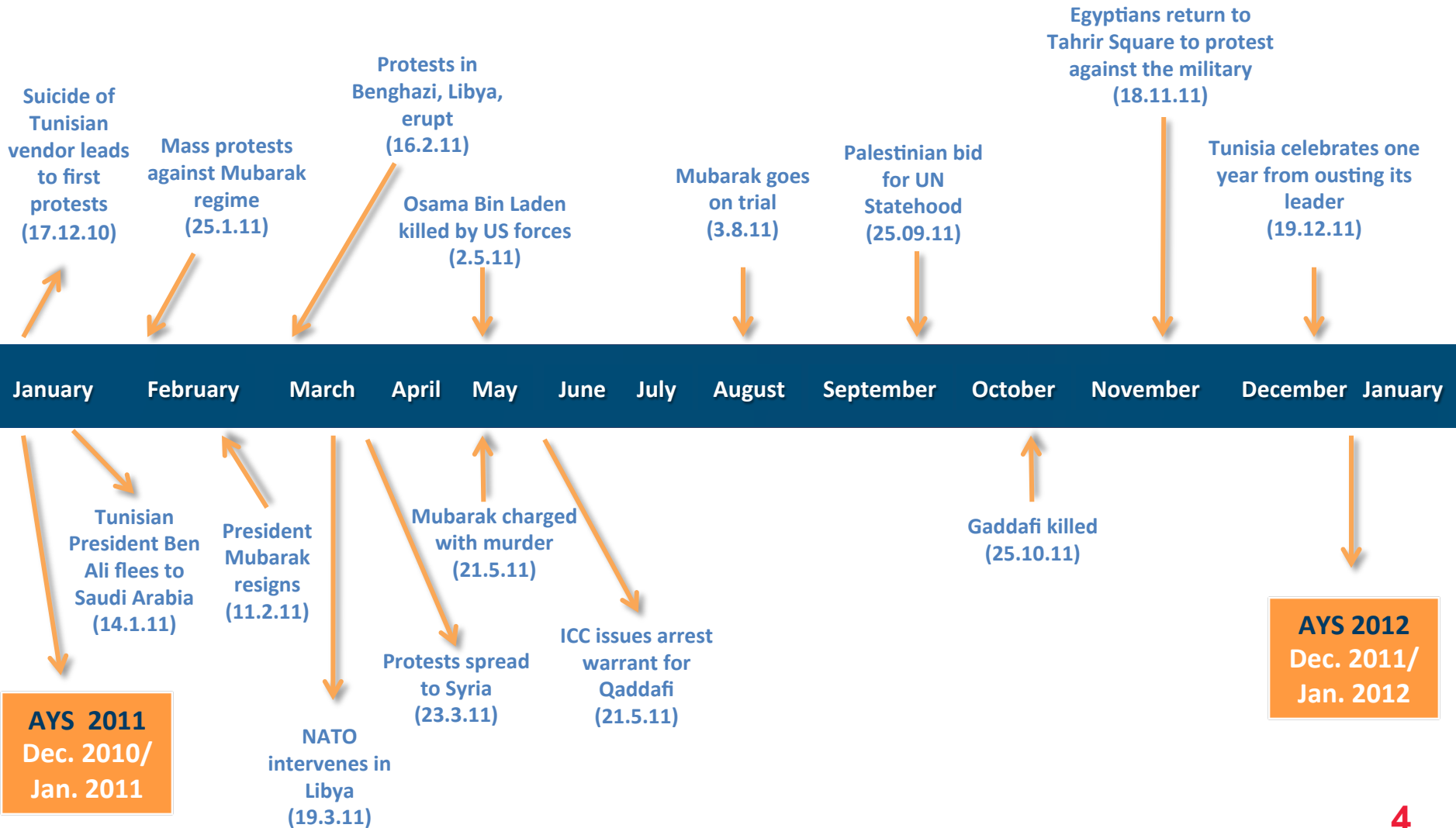
The study was commissioned to explore attitudes among Arab national youth in 12 Middle East countries.

PSB conducted 2,500 face-to-face interviews among respondents aged 18-24 from December 2011-January 2012. Sample details are given below:

									New in 2011	New in 2012	
UAE	Oman	Qatar	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon	Iraq	Tunisia	Libya
N=250	N=150	N=200	N=200	N=250	N=200	N=250	N=200	N=200	N=200	N=200	N=200
Dubai – 40%	Muscat – 50%	Doha – 55%	Manama – 100%	Jeddah – 40%	Kuwait City – 20%	Cairo – 50%	Amman – 50%	East Beirut – 40%	Baghdad (50%)	Tunis (50%)	Tripoli (50%)
Sharjah – 20%				Riyadh – 40%	Al Hawalli – 30th	Alexandria – 25%	Irbid – 25%	West Beirut – 40%	Irbil (25%)	Safaqis (25%)	Benghazi (25%)
Abu Dhabi – 40%	Batinah – 50%	Al Rayyan – 45%		Dammam – 20%	Al Ahmadi – 20%	Mansoura – 25%	Zarqa – 25%	Tripoli – 20%	Basrah (25%)	Susah (25%)	Misrata (25%)
				Al Farwaniya – 30%							

- 2008/09 research was conducted using an online methodology
- 2009/10 and 2010/11 research was completed face-to-face
- 2012 data was weighted by market to ensure equal representation within the sample

Timeline



Top 10 findings

1

FAIR PAY AND HOME OWNERSHIP DISPLACE DESIRE FOR DEMOCRACY AS TOP PRIORITY

2

HIGH COST OF LIVING REMAINS THE GREATEST CONCERN AMONG ARAB YOUTH

3

ARAB YOUTH SAY THAT LACK OF DEMOCRACY AND CIVIL UNREST ARE THE BIGGEST OBSTACLES FACING THEM & THE REGION

4

REGIONAL YOUTH SEE THE ARAB SPRING AS A POSITIVE DEVELOPMENT AND NOW FEEL GREATER OPTIMISM ABOUT THE FUTURE

5

ARAB YOUTH FEEL AN INCREASED SENSE OF TRUST IN GOVERNMENT BUT HAVE HEIGHTENED CONCERNS ABOUT CORRUPTION

6

THE ARAB SPRING WILL NOT SPREAD FURTHER, ACCORDING TO THE REGION'S YOUTH

7

TRADITIONAL VALUES ARE BEING INCREASINGLY CHALLENGED BY A MODERN OUTLOOK

8

THE UAE IS SEEN AS A MODEL NATION BY MIDDLE EAST YOUTH

9

ARAB YOUTH SEE FRANCE MOST FAVOURABLY AMONG ALL FOREIGN COUNTRIES; VIEWS OF CHINA AND INDIA ARE ALSO INCREASINGLY POSITIVE

10

NEWS CONSUMPTION SKYROCKETS, TV VIEWERSHIP DECLINES & BLOGS ARE BOOMING

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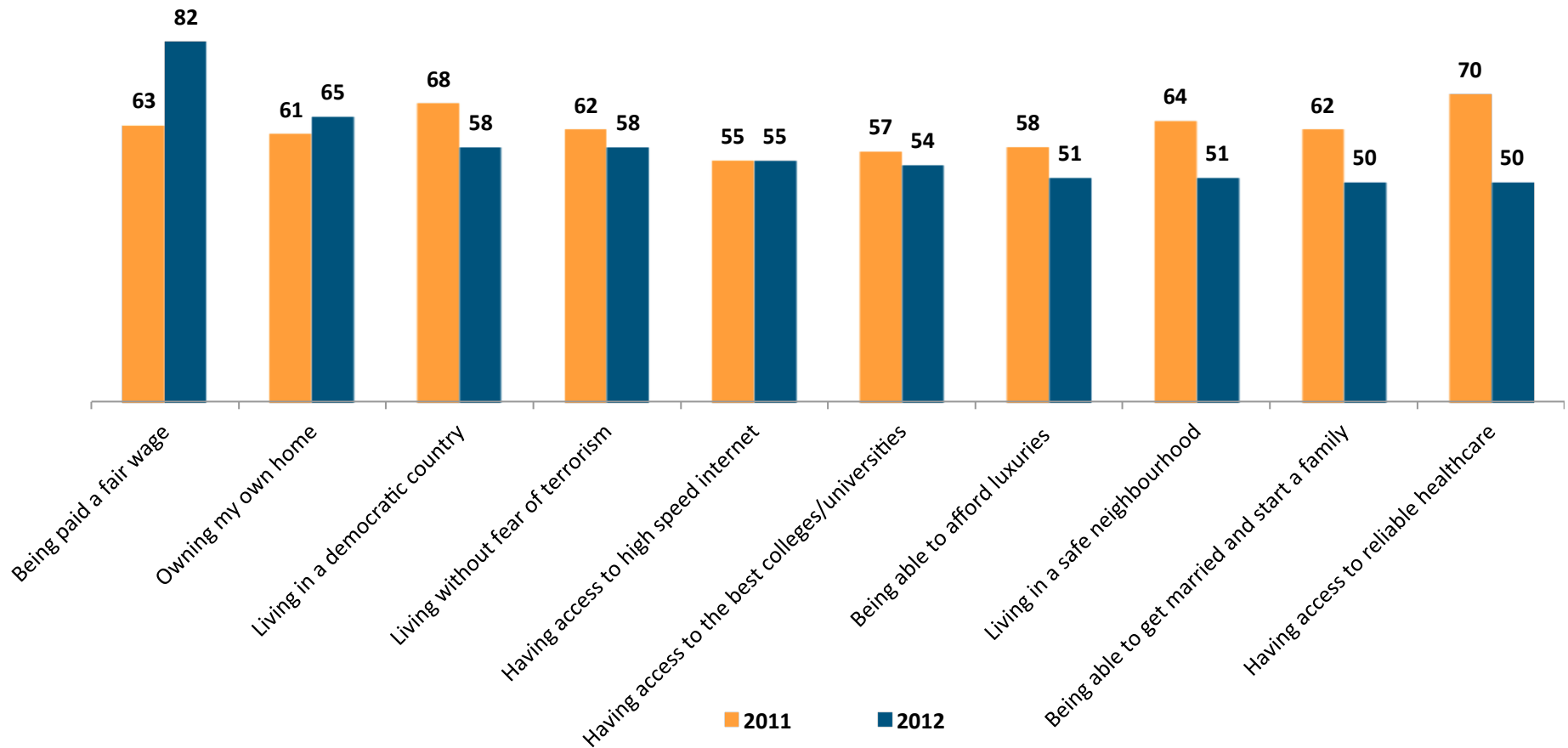
ARAB YOUTH SURVEY 2012

1

Fair pay and home ownership displace desire for democracy as top priority

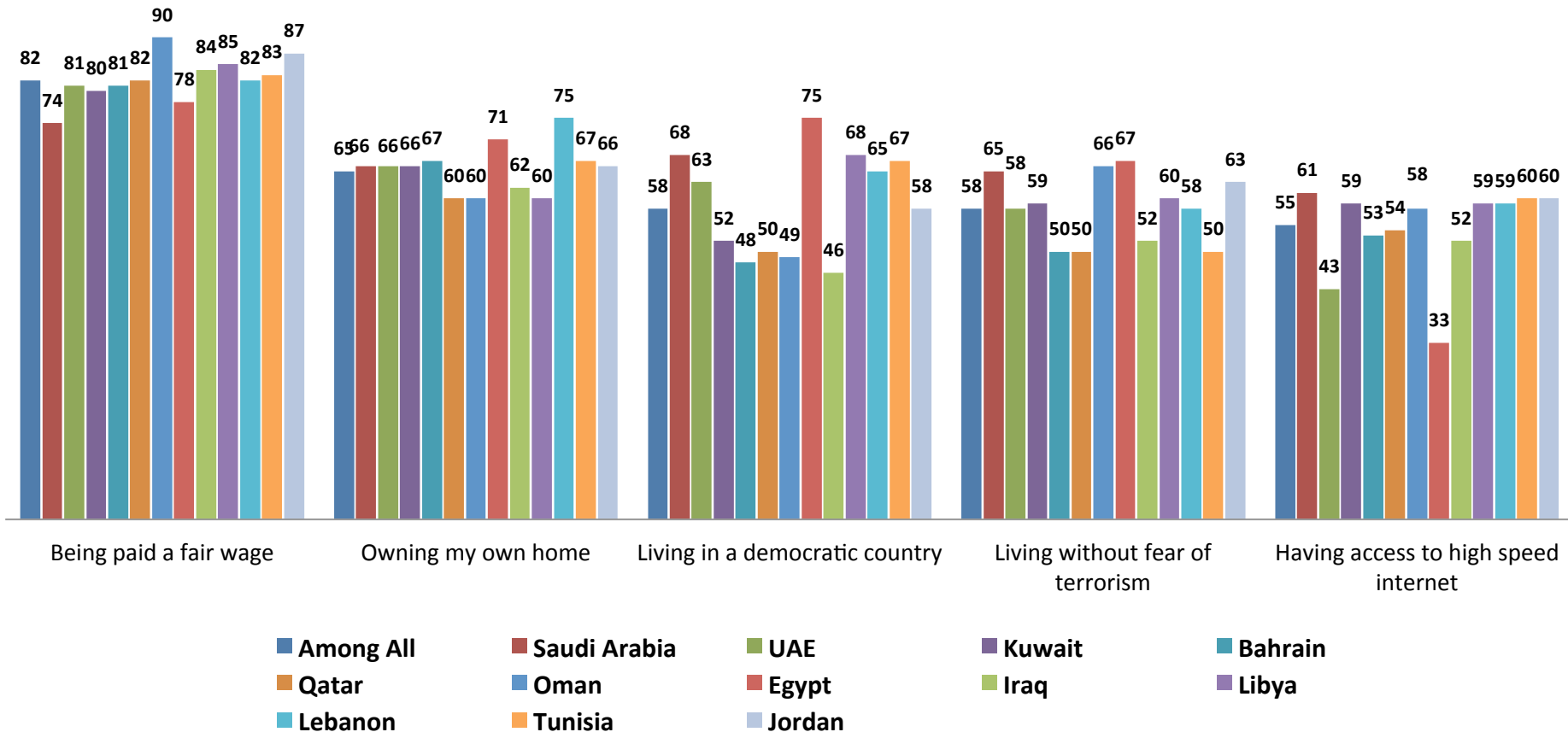
Top priorities

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



Top priorities

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



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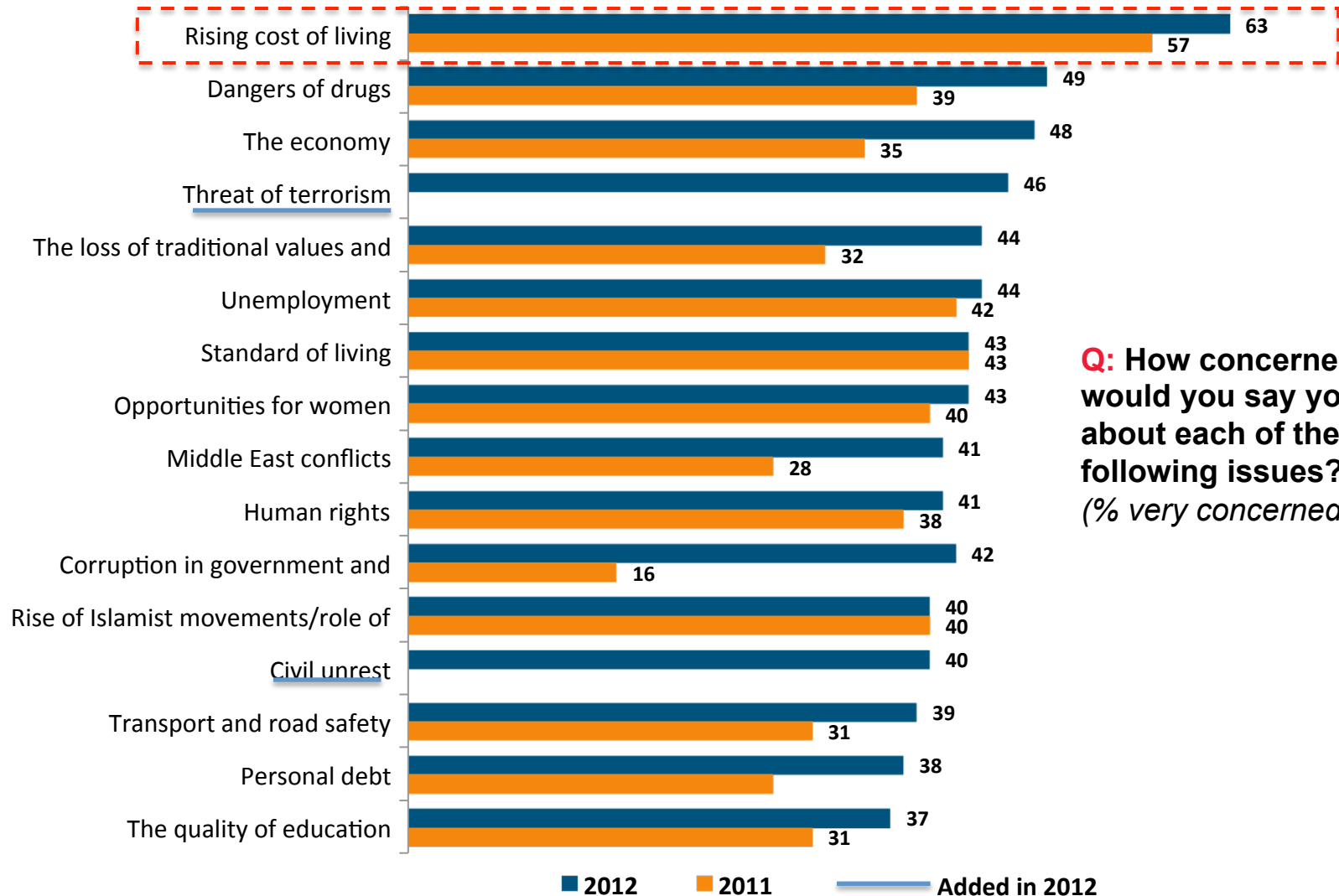


ARAB YOUTH SURVEY 2012

2

High cost of living remains the greatest concern among Arab youth

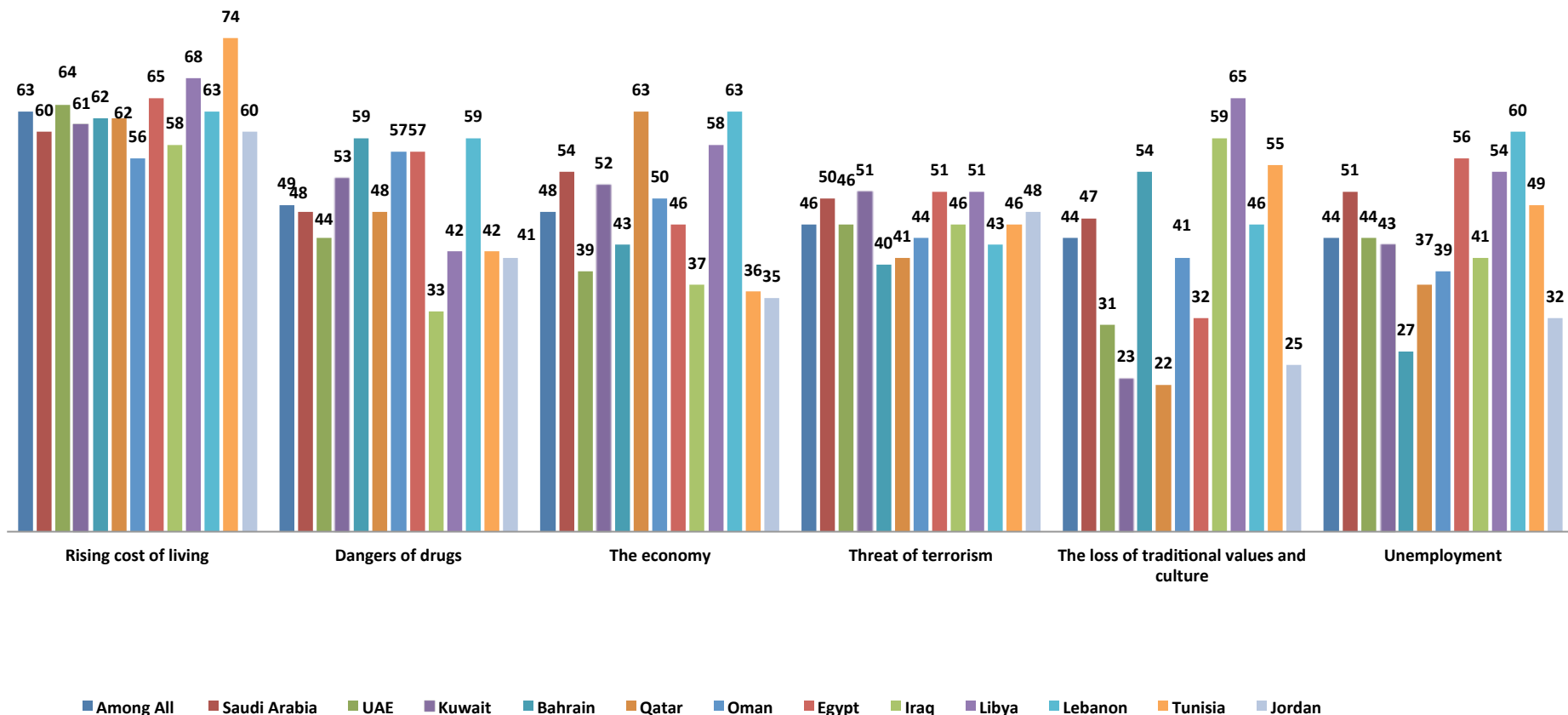
Key concerns



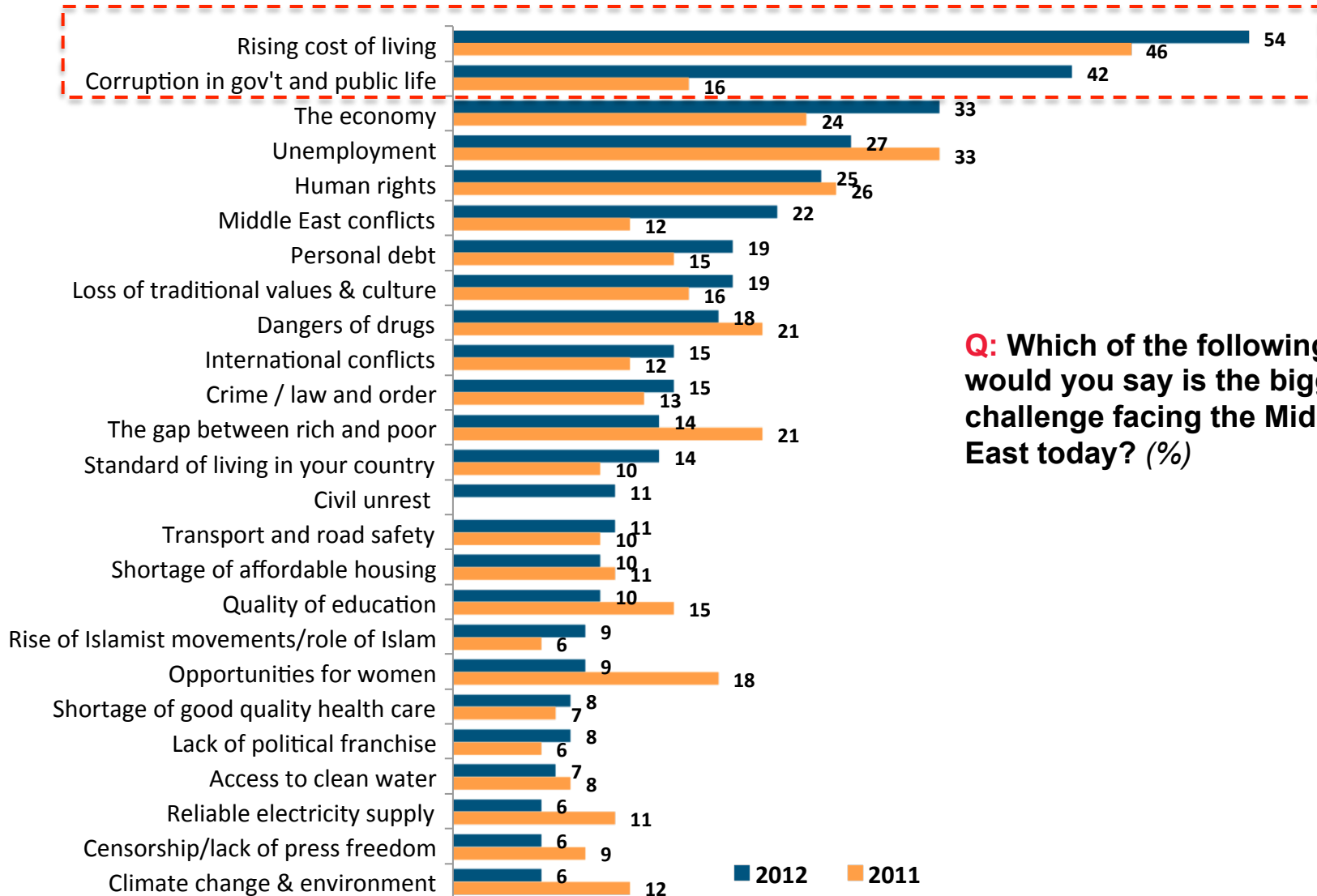
Q: How concerned would you say you are about each of the following issues?
 (% very concerned)

Key concerns

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

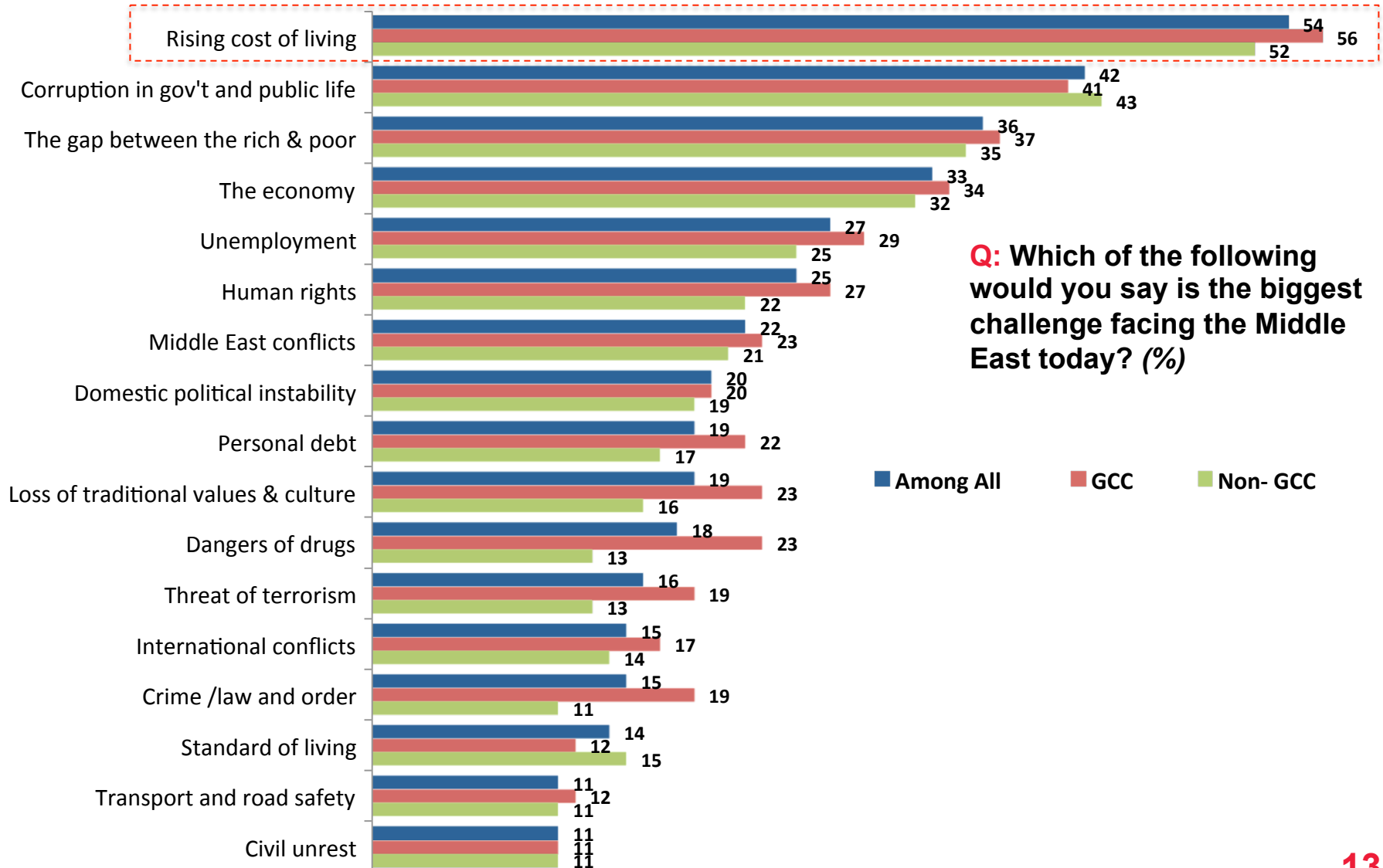


Biggest challenges



Q: Which of the following would you say is the biggest challenge facing the Middle East today? (%)

Biggest challenges



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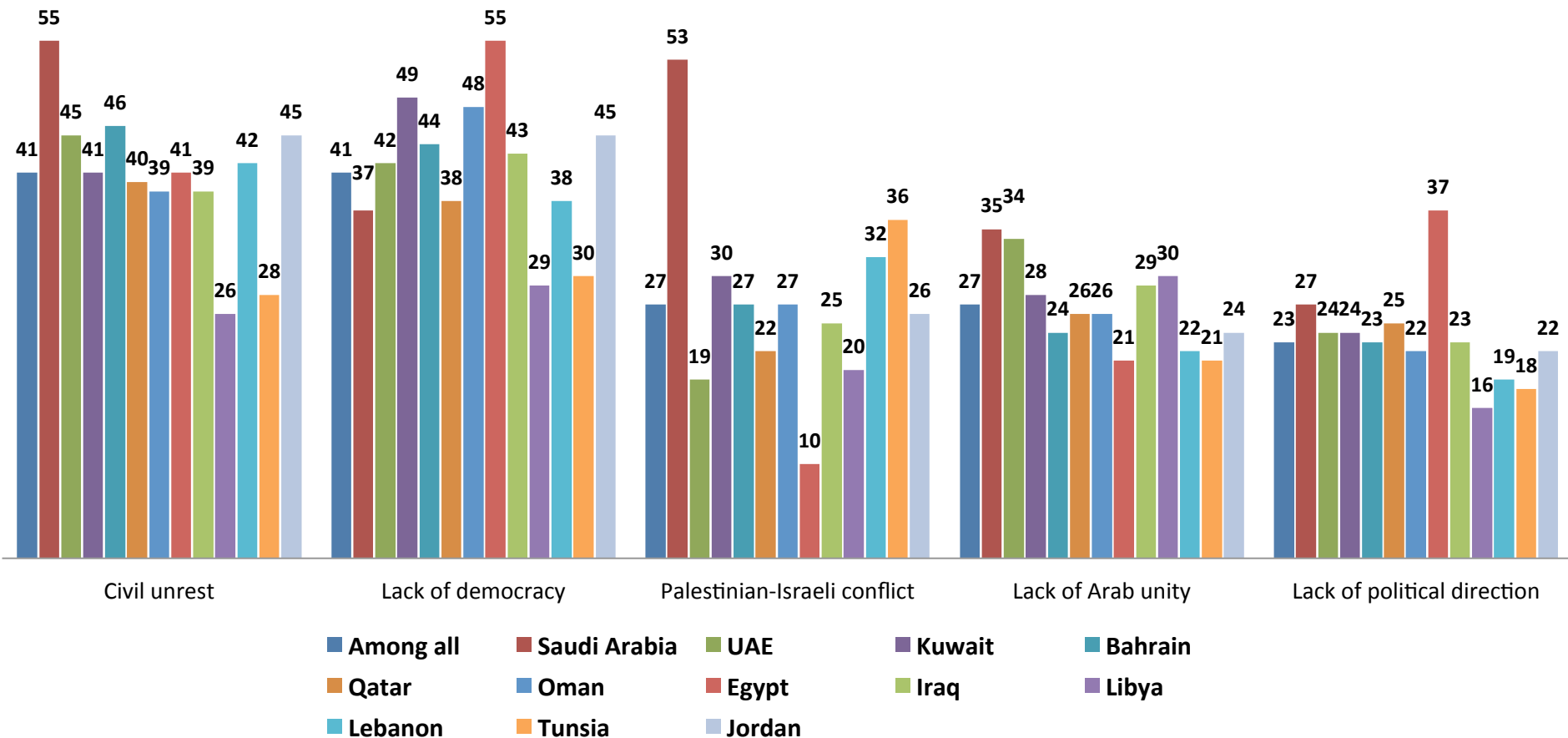
ARAB YOUTH SURVEY 2012

3

Arab youth say that lack of democracy and civil unrest are the biggest obstacles facing them & the region

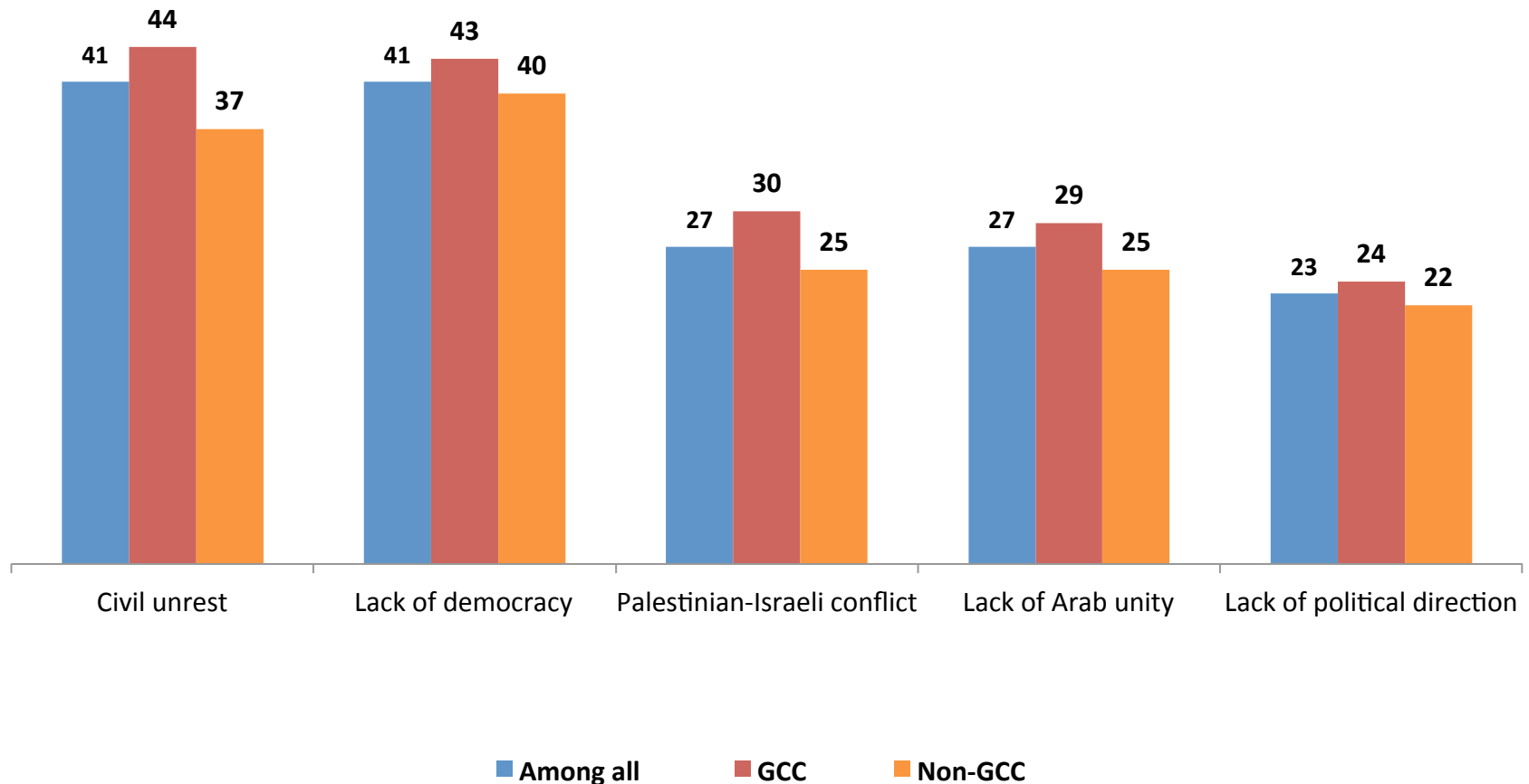
Biggest obstacles

Q: What do you believe is the biggest obstacle facing the Middle East? (%)



Biggest obstacles

Q: What do you believe is the biggest obstacle facing the Middle East? (%)



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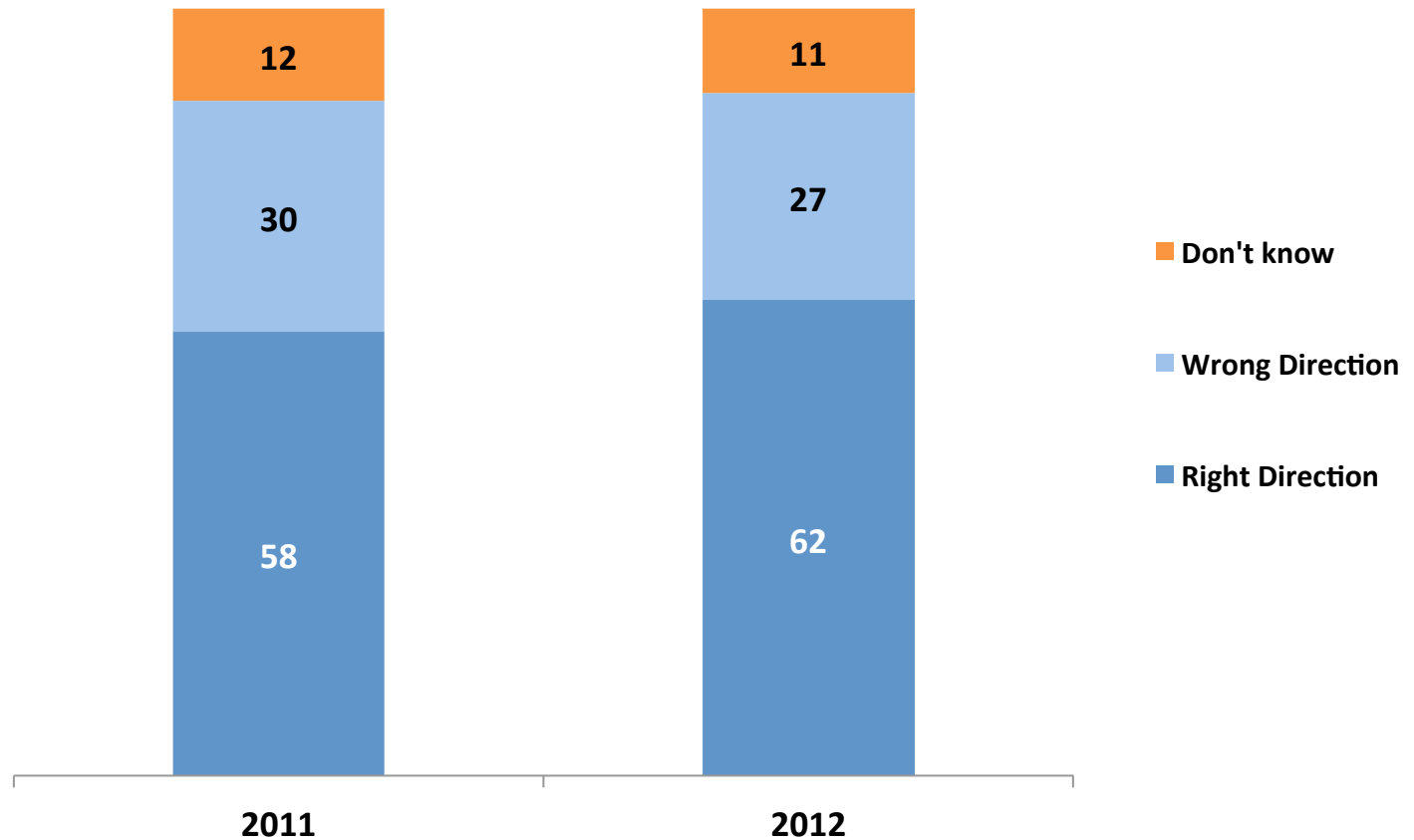
ARAB YOUTH SURVEY 2012

4

Regional youth see the Arab Spring as a positive development and now feel greater optimism about the future

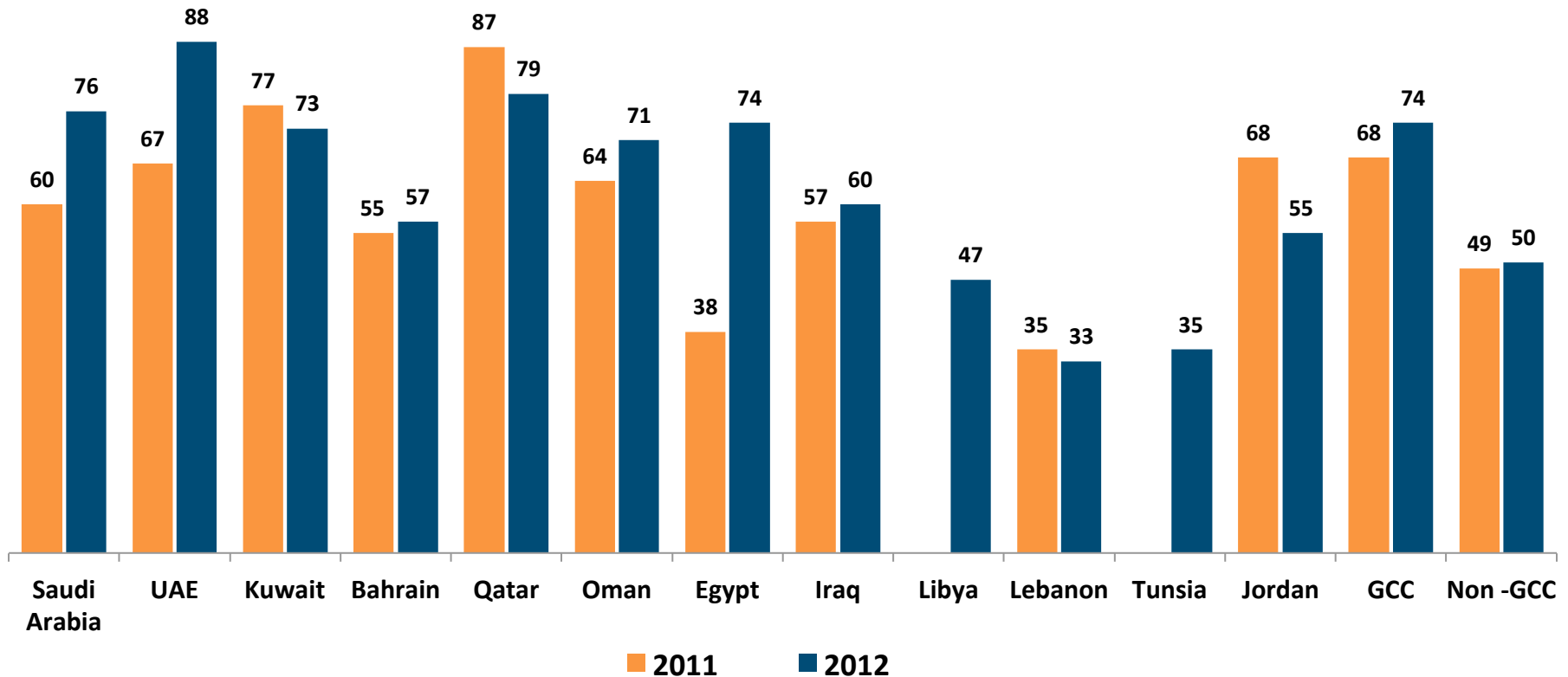
Increased optimism

Q: 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? (%)



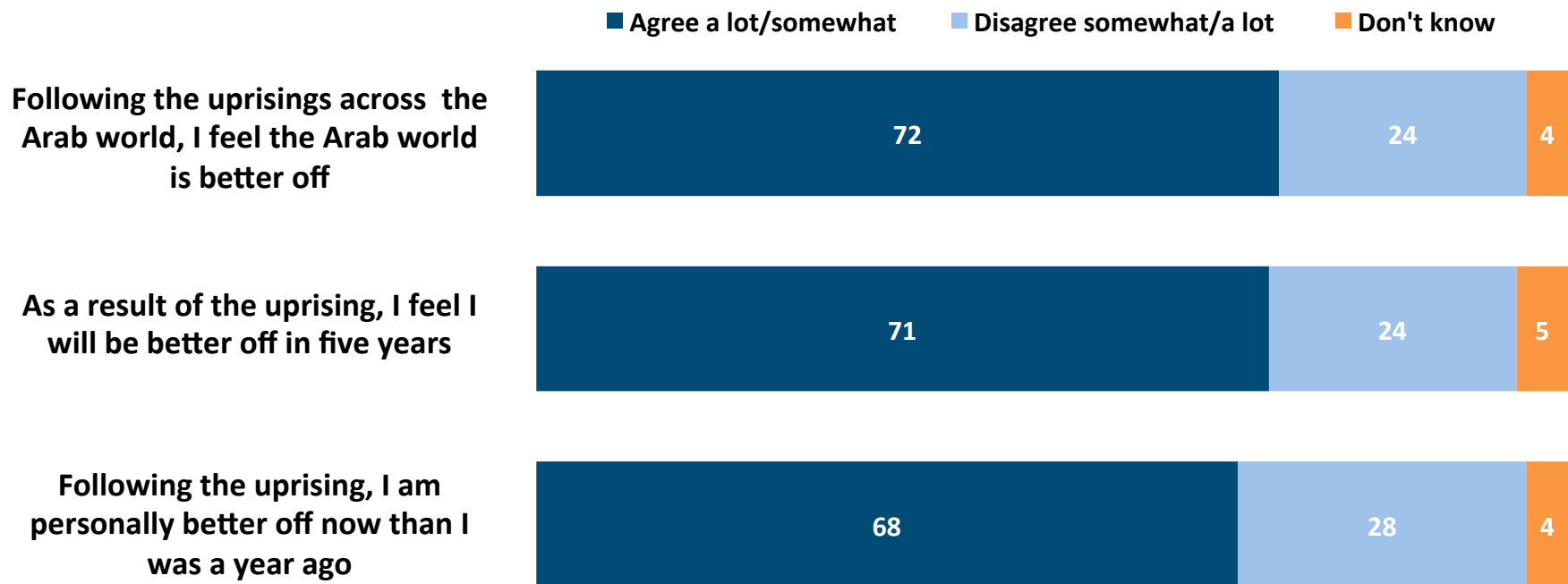
Increased optimism

Q: 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*)



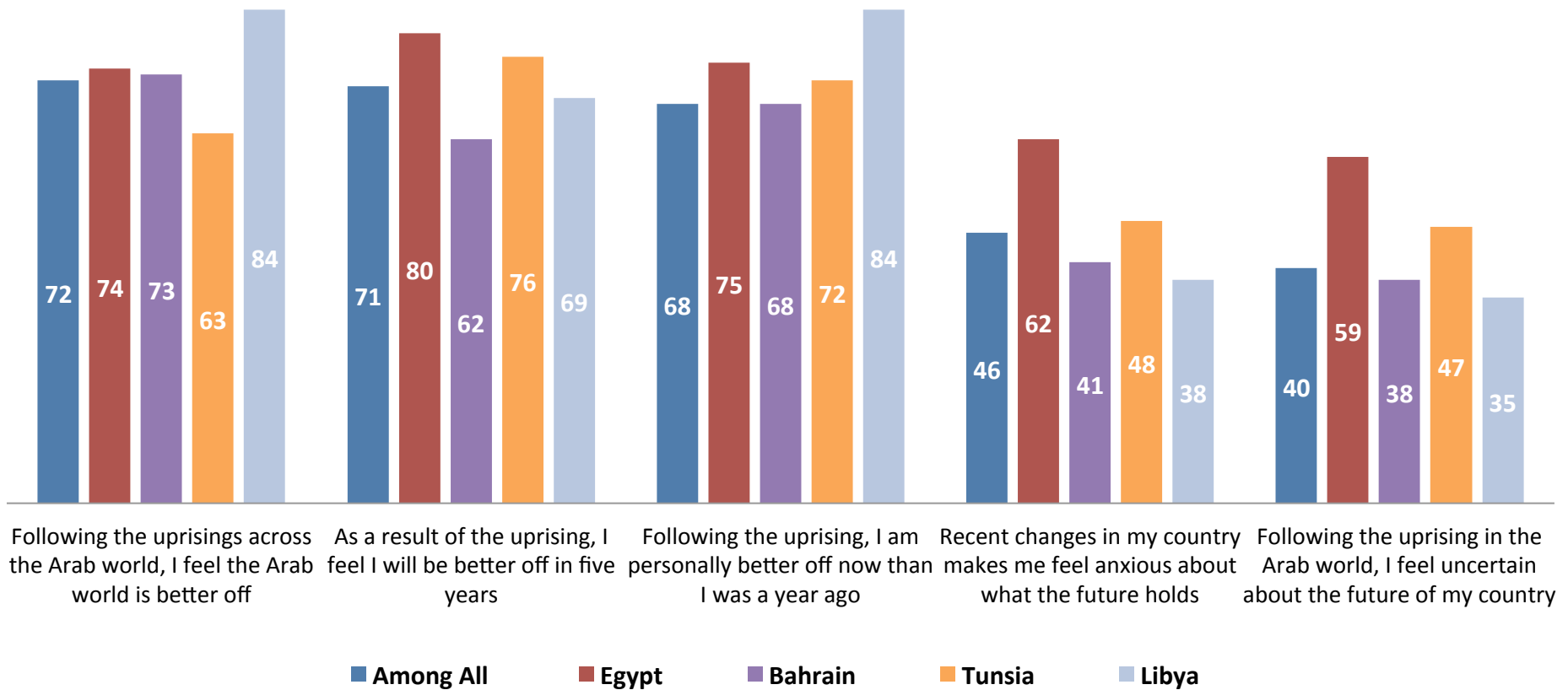
Impact of the Arab Spring

Q: How far do you agree or disagree with the following? (%)



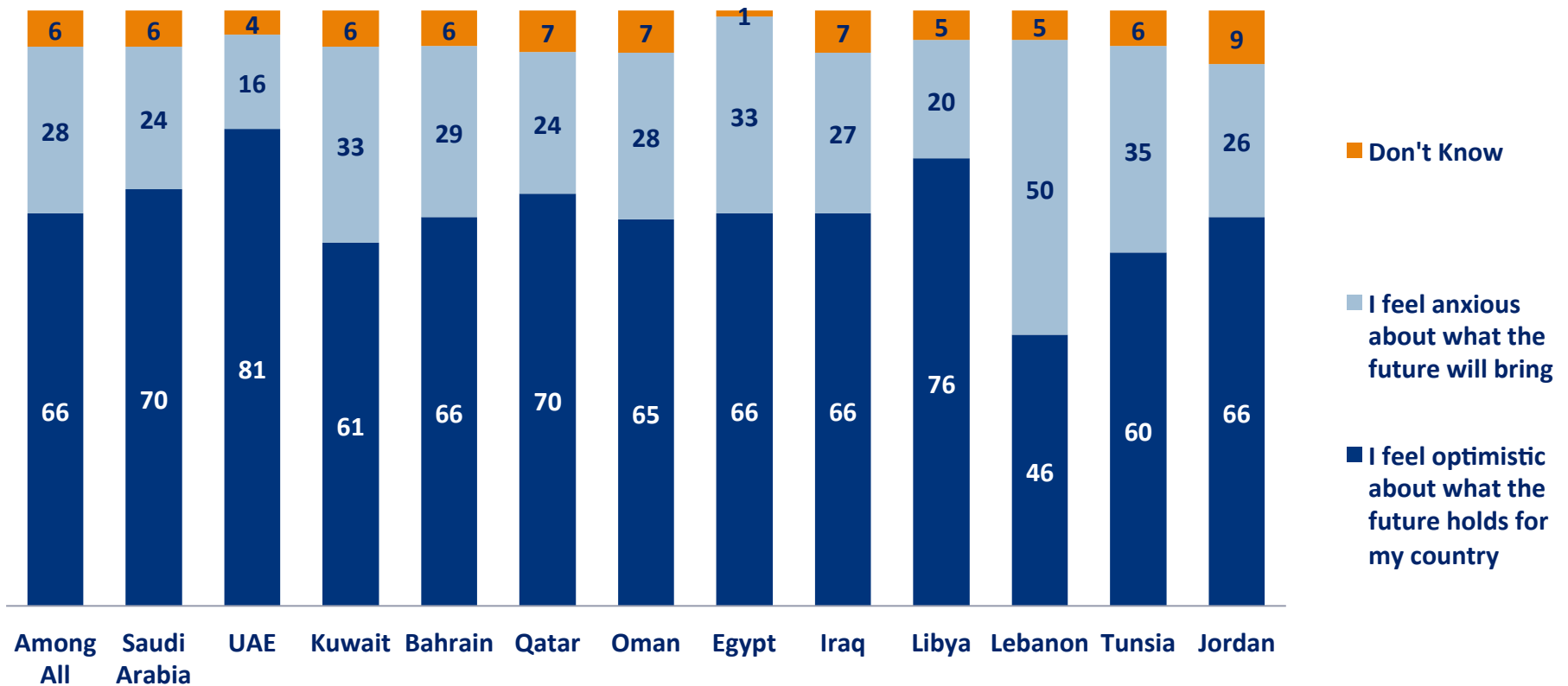
Impact of the Arab Spring

Q: How far do you agree or disagree with the following?
 (% agree a lot/somewhat)



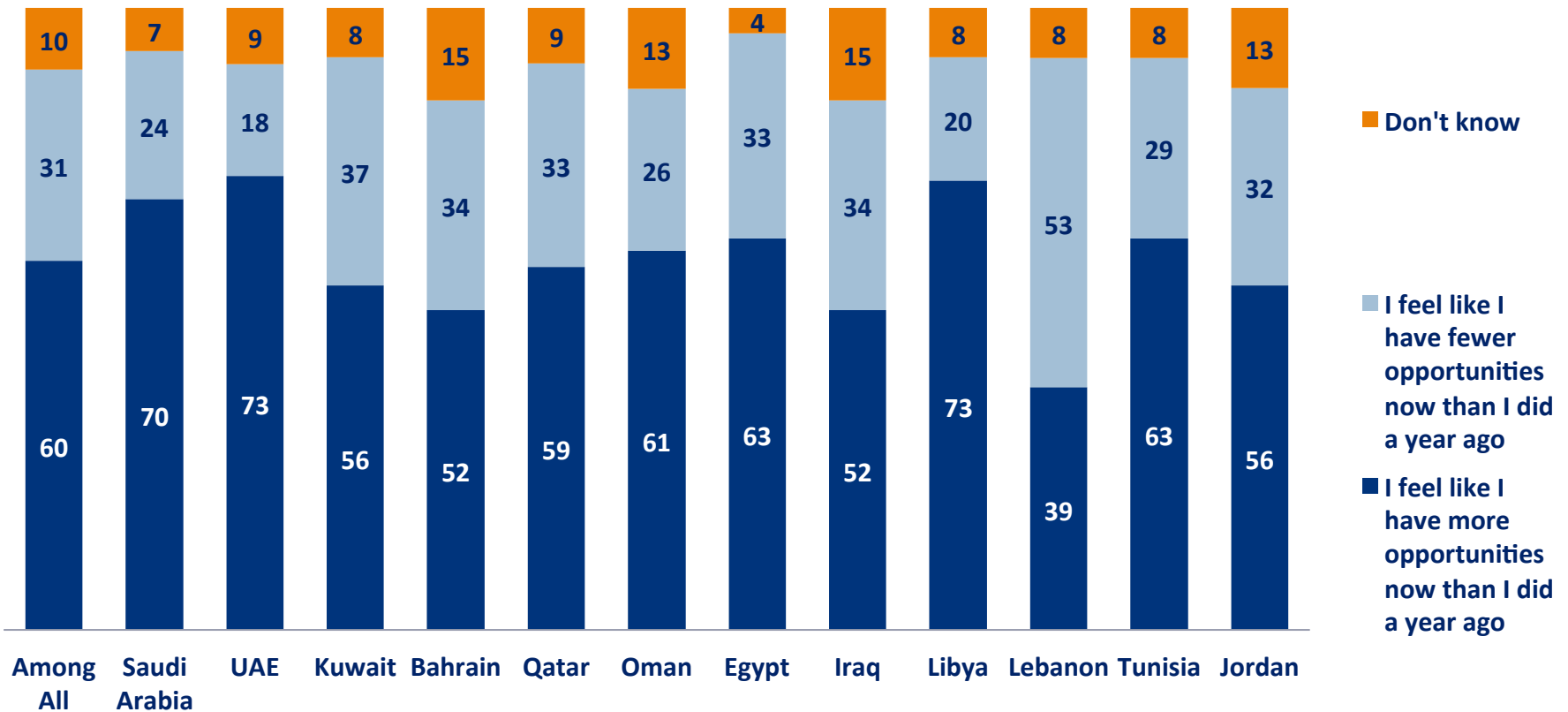
Optimism about the future

Q: Which of the following statements is closer to your view? (%)



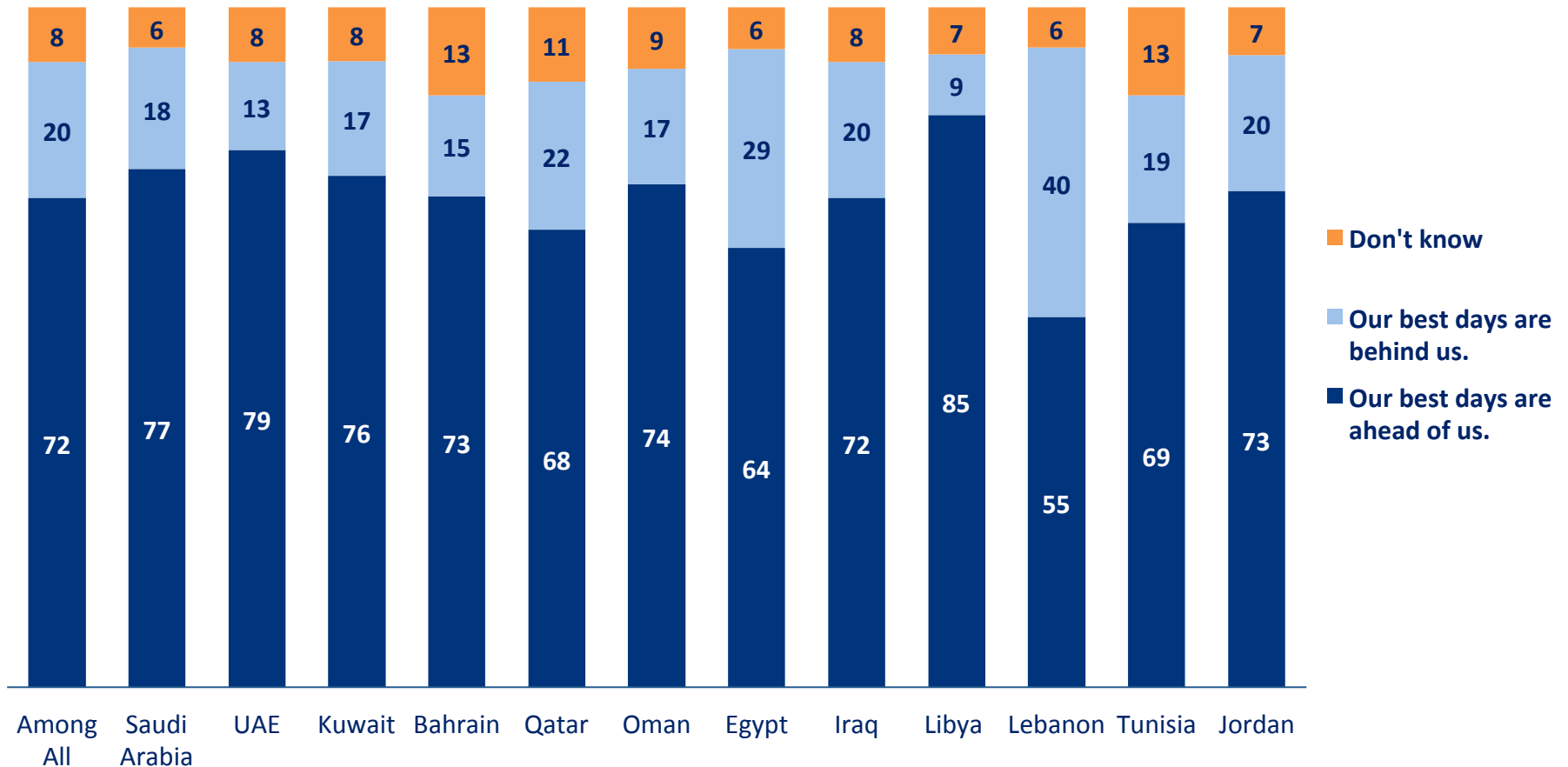
Optimism about the future

Q: Which of the following statements is closer to your view? (%)



Increased optimism

Q: Which of the following statements is closer to your view? (%)



ASDA'A Burson-Marsteller



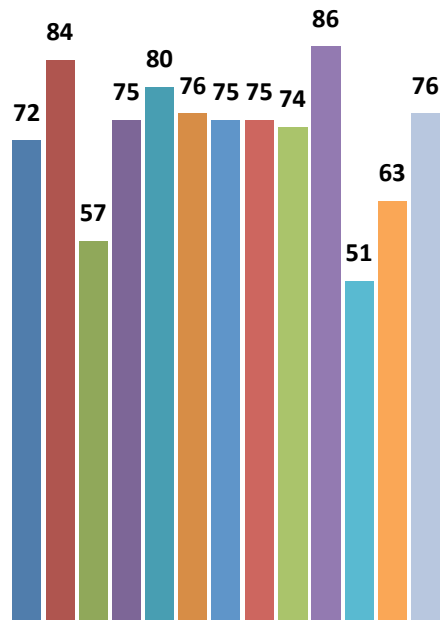
ARAB YOUTH SURVEY 2012

5

Arab youth feel an increased sense of trust in government but have heightened concerns about corruption

Trust in government

Q: How far do you agree or disagree with the following?
 (% agree a lot/somewhat)



Your government has become more trustworthy and transparent since the Arab Spring

Q: How far do you agree or disagree with the following? (%)

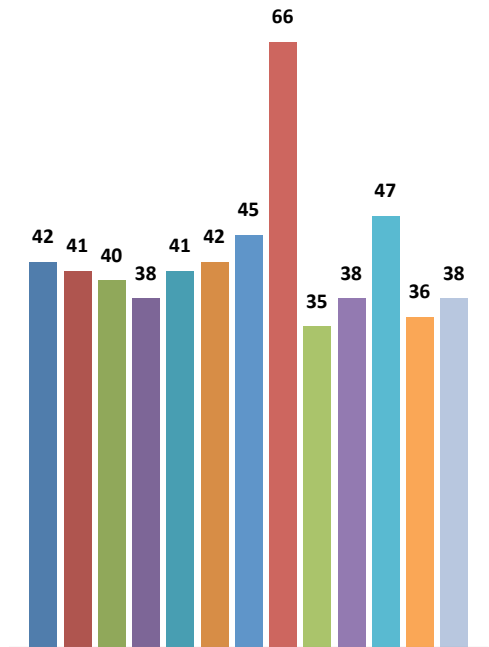
Your government has become more trustworthy and transparent since the Arab Spring



- Among All
- Saudi Arabia
- UAE
- Kuwait
- Bahrain
- Qatar
- Oman
- Egypt
- Iraq
- Libya
- Lebanon
- Tunisia
- Jordan

Concerns about corruption

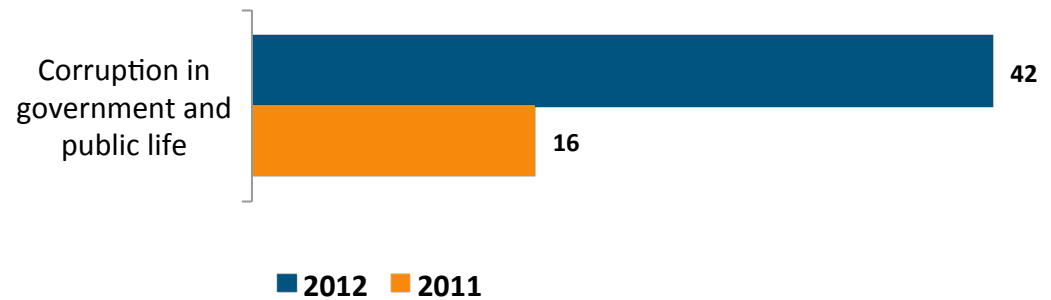
Q: How concerned are you about the following issue? (% very concerned)



Corruption in government and public life

- Among All
- Saudi Arabia
- UAE
- Kuwait
- Bahrain
- Qatar
- Oman
- Egypt
- Iraq
- Libya
- Lebanon
- Tunisia
- Jordan

Q: How concerned are you about the following issue? (% very concerned)



ASDA'A Burson-Marsteller



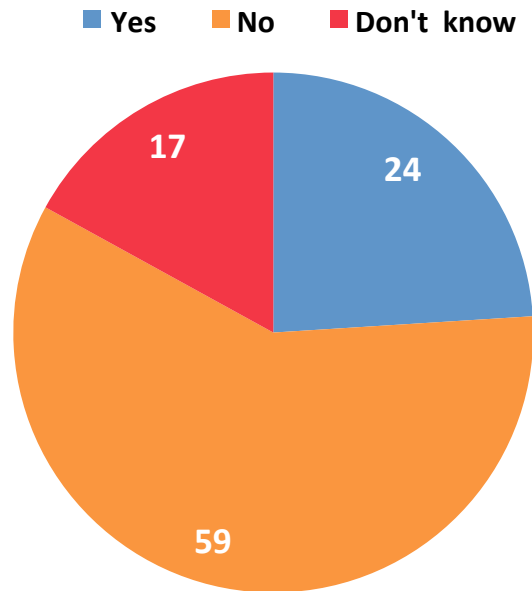
ARAB YOUTH SURVEY 2012

6

The Arab Spring will not spread further, according to the region's youth

Future protests

Q: Do you think the protests will spread to any new Arab countries?
(%)

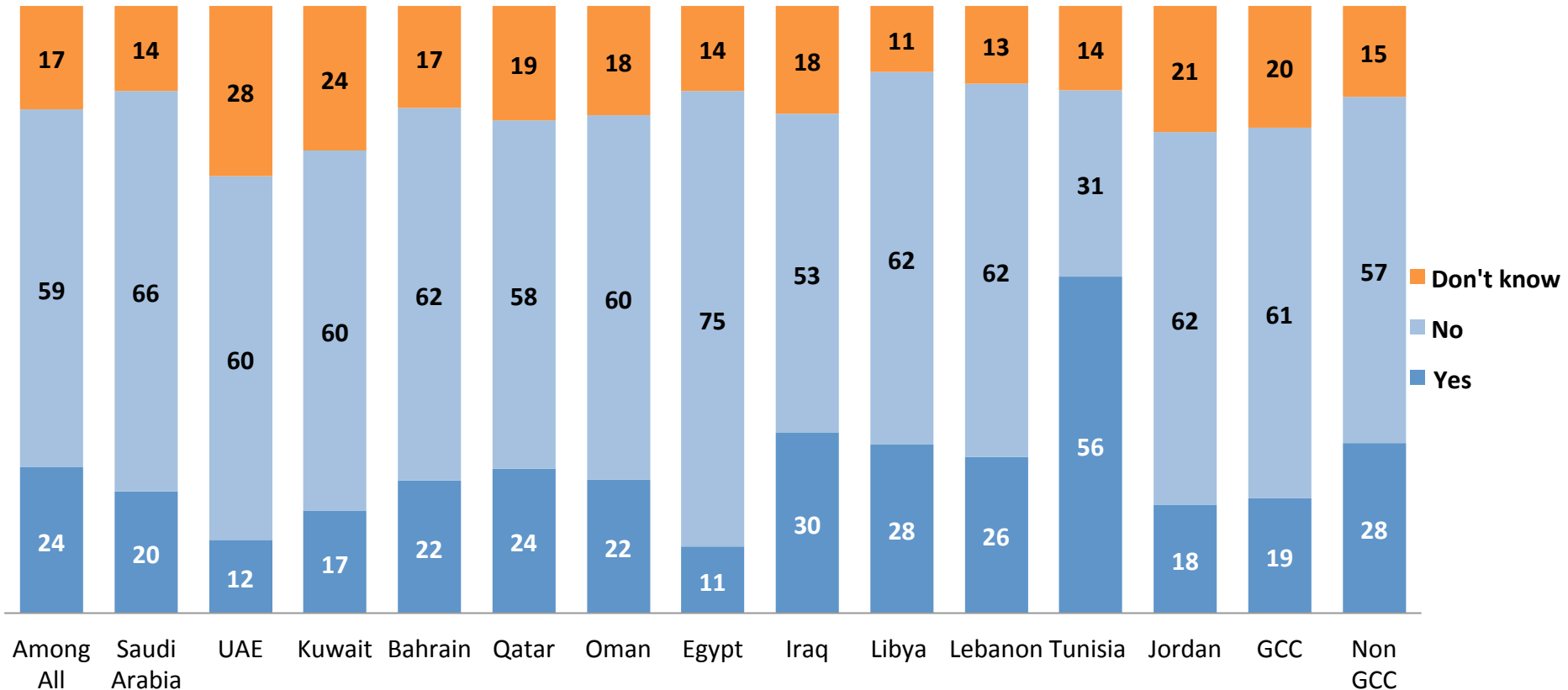


Q: If yes, which countries do you think the protests are most likely to spread to next?



Future protests

Q: Do you think the protests will spread to any new Arab countries? (%)



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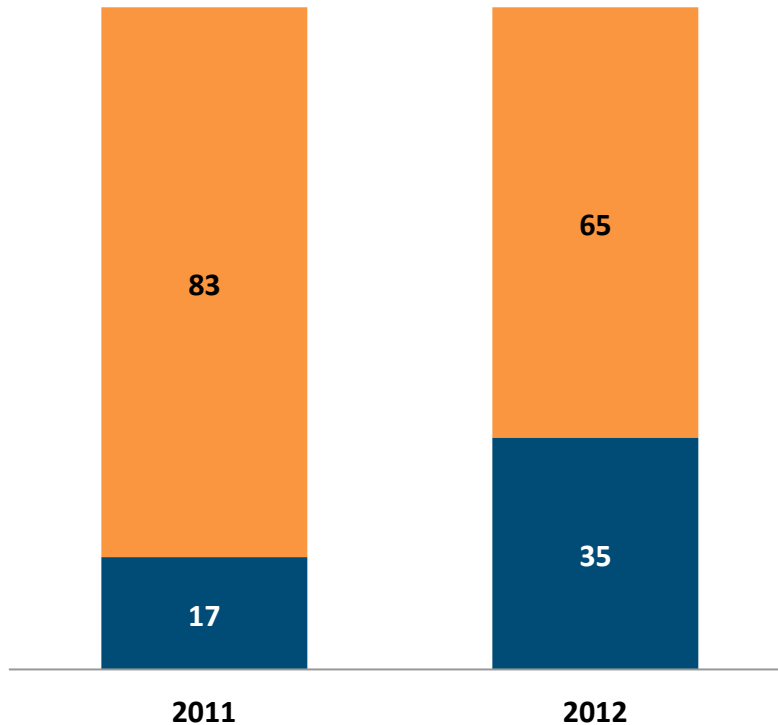
ARAB YOUTH SURVEY 2012

7

Traditional values are being increasingly challenged by a modern outlook

Traditional vs. modern values

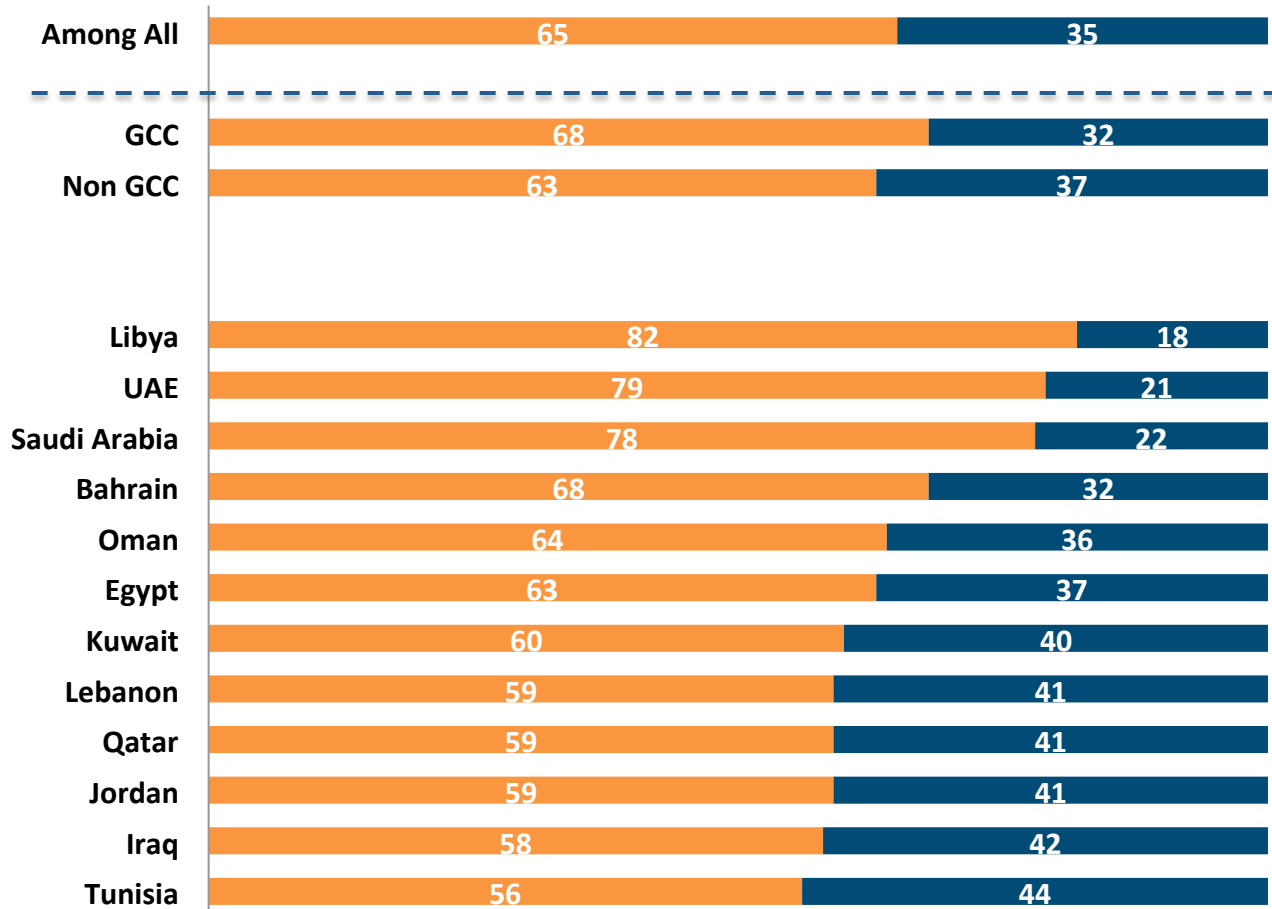
Q: Which of the following is closest to your view? (%)



- 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.

Traditional vs. modern values

Q: 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.

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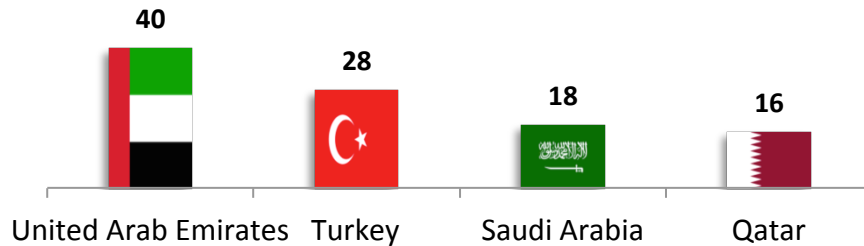
ARAB YOUTH SURVEY 2012

8

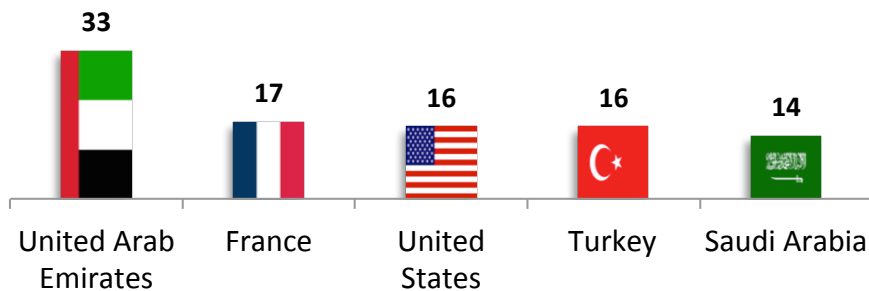
The UAE is seen as a model nation by Middle East youth

Model nations

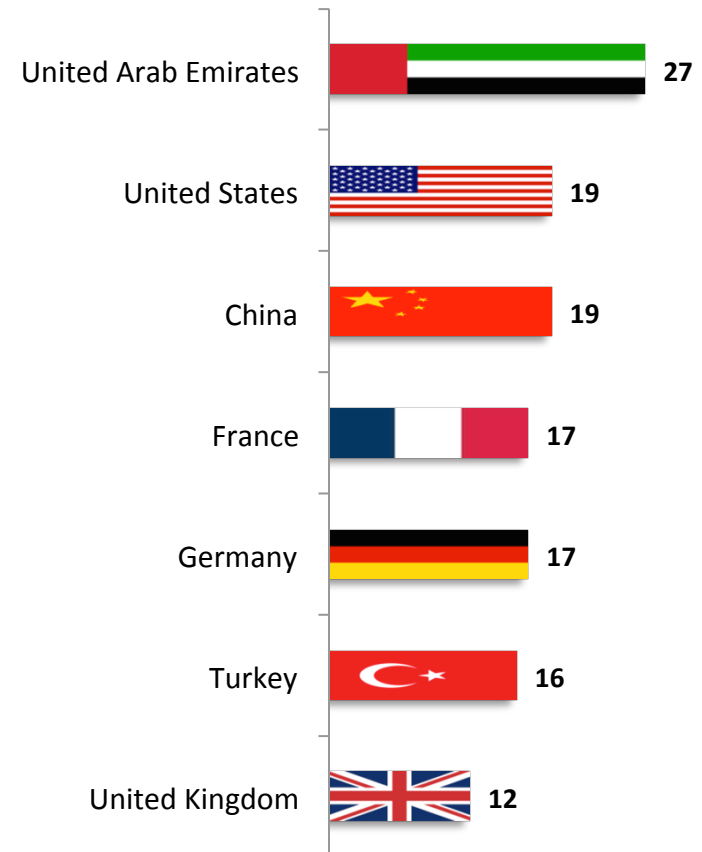
Q: Which country in the world would you most like your country to be like? (%)



Q: Which country in the world would you like to live in? (%)

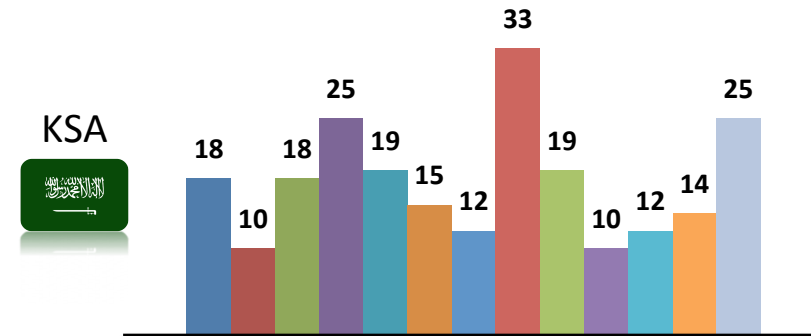
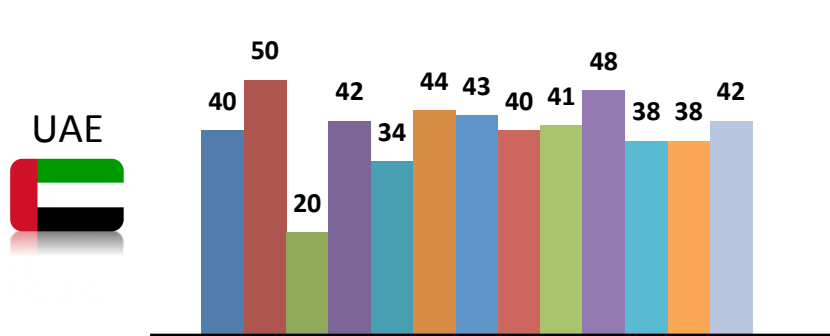


Q: As your country develops, which country's model of growth and development would you like your country to follow? (%)

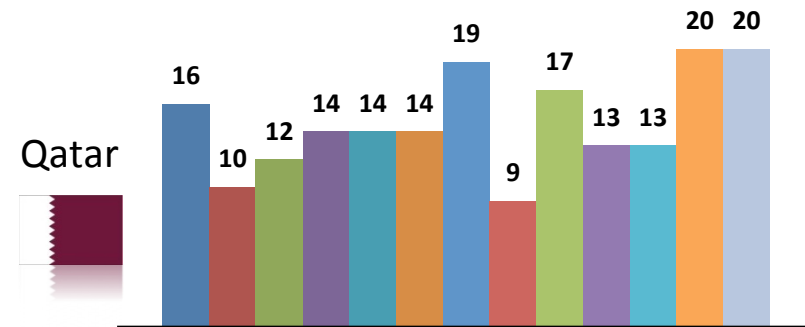
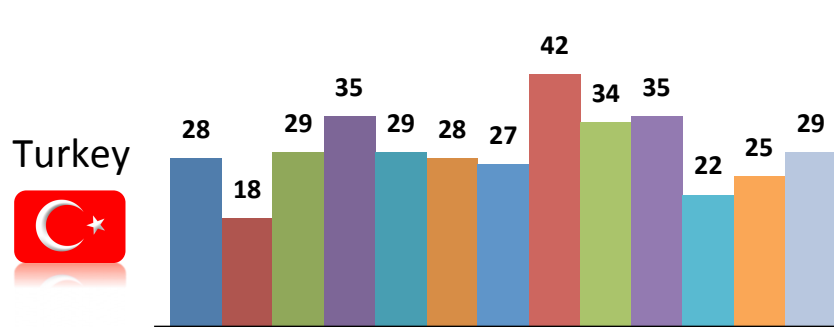


Model nations

Q: Which country in the world would you most like your country to be like? (%)

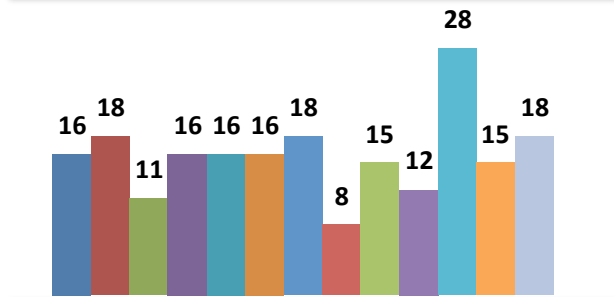
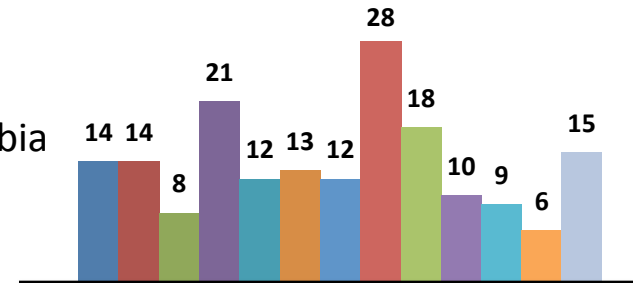
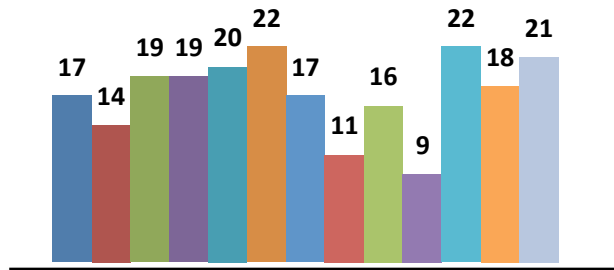
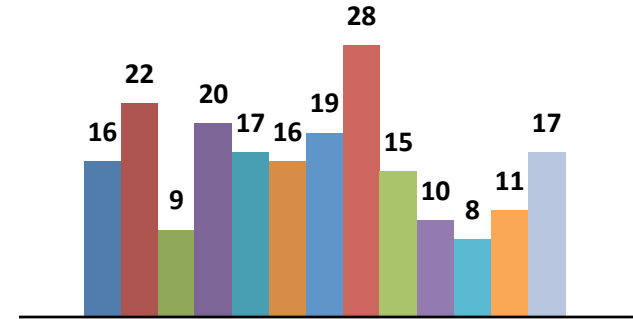
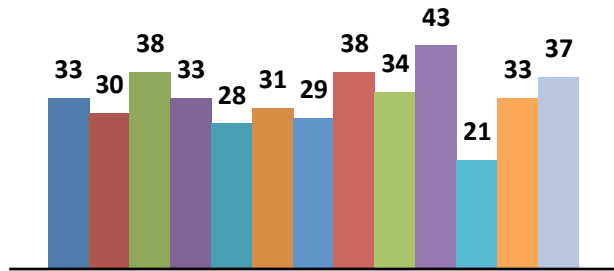


■ Among All
 ■ KSA
 ■ UAE
 ■ Kuwait
 ■ Bahrain
 ■ Qatar
 ■ Oman
■ Egypt
 ■ Iraq
 ■ Libya
 ■ Lebanon
 ■ Tunisia
 ■ Jordan



Top countries to live in

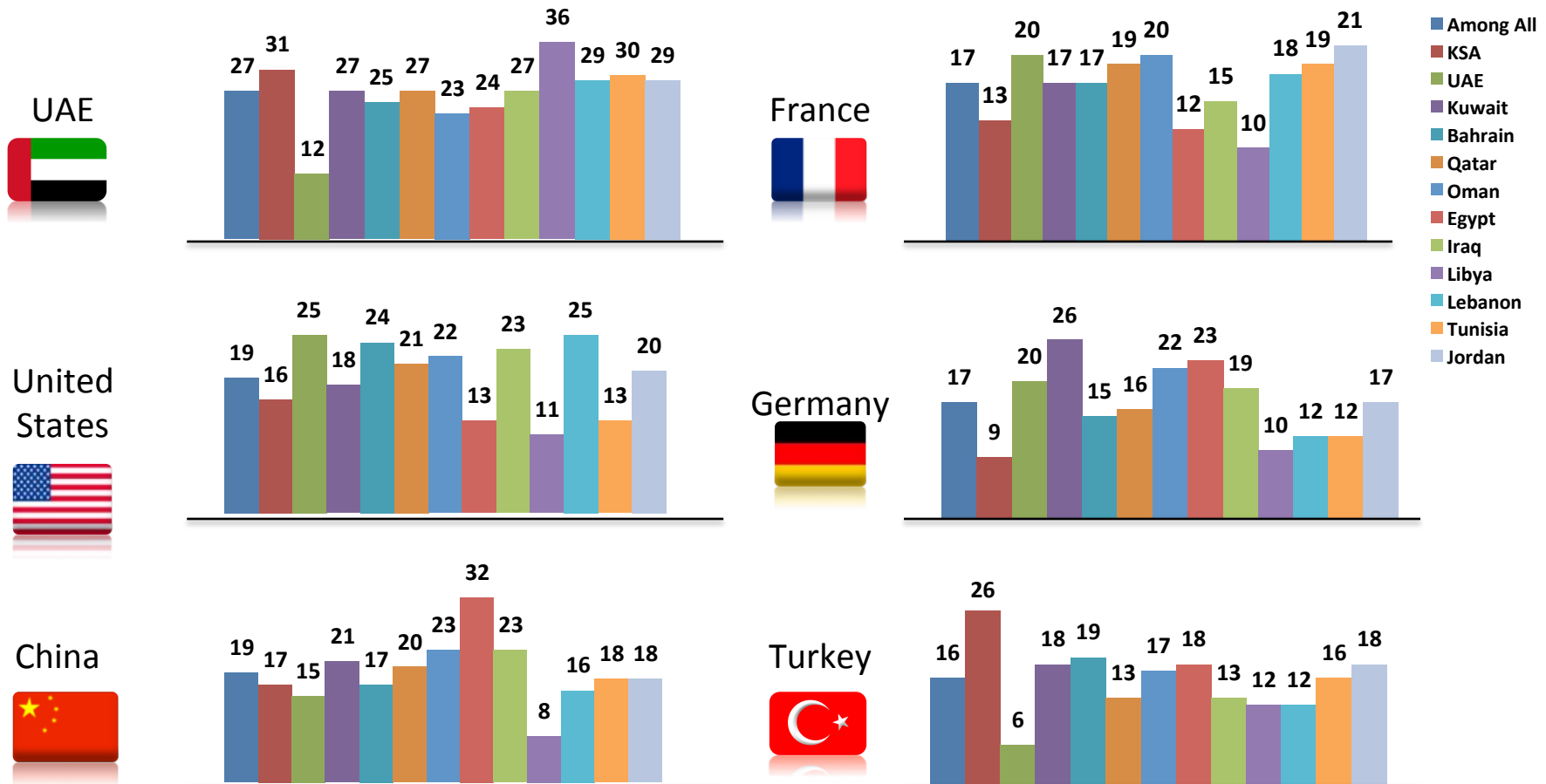
Q: Which country in the world would you like to live in? (%)



- Among All
- KSA
- UAE
- Kuwait
- Bahrain
- Qatar
- Oman
- Egypt
- Iraq
- Lebanon
- Tunisia
- Libya
- Jordan

Models of growth & development

Q: As your country develops, which country's model of growth and development would you like your country to follow? (%)



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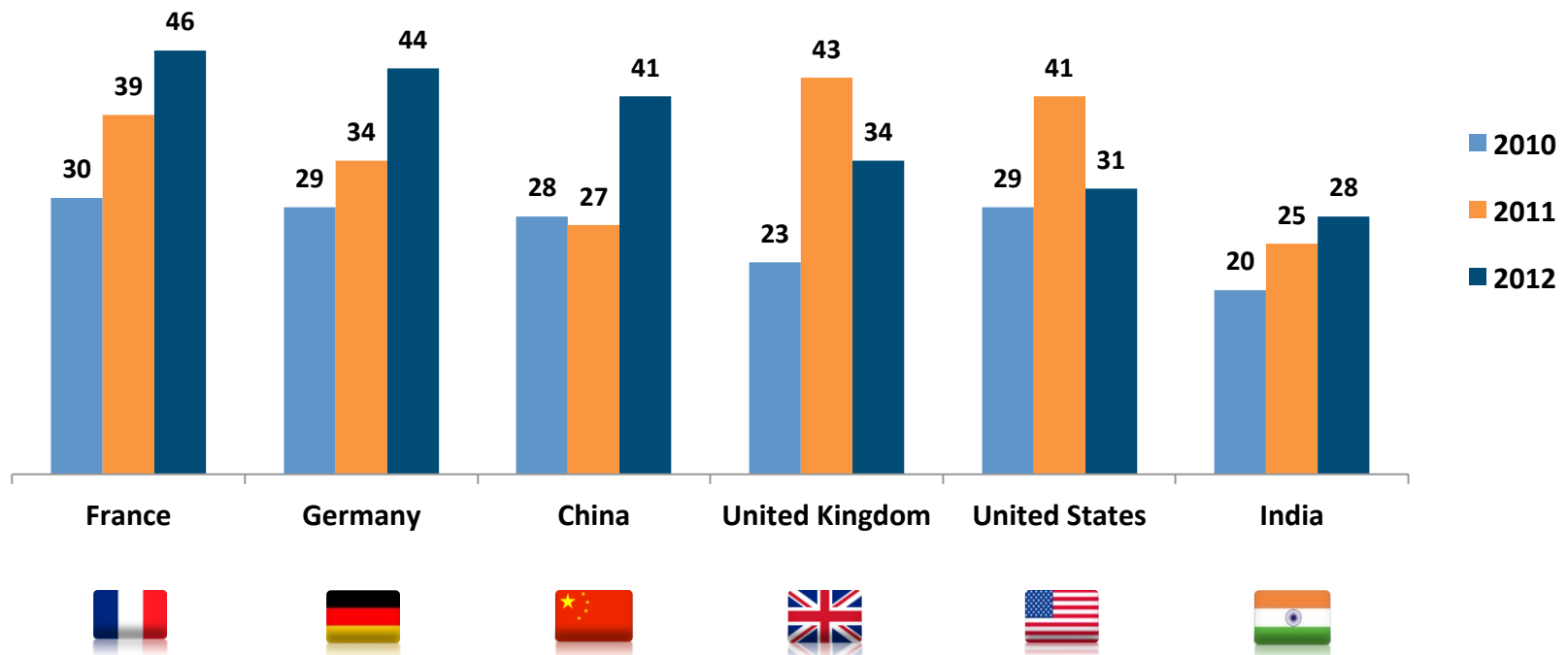
ARAB YOUTH SURVEY 2012

9

Arab youth see France most favourably among all foreign countries; views of China and India are also increasingly positive

Foreign relations

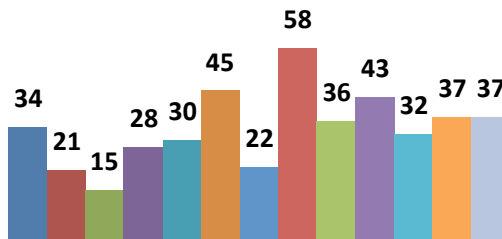
Q: How favourable are you to the following countries?
 (% very favourable)



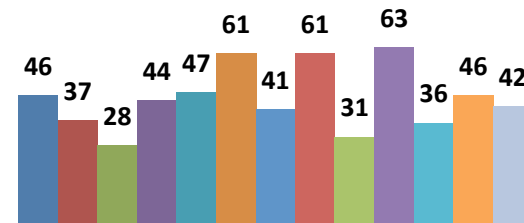
Foreign relations

Q: How favourable are you to the following countries?
 (% very favourable)

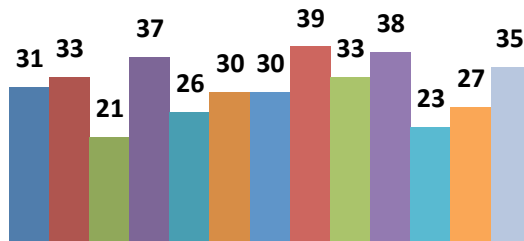
United Kingdom



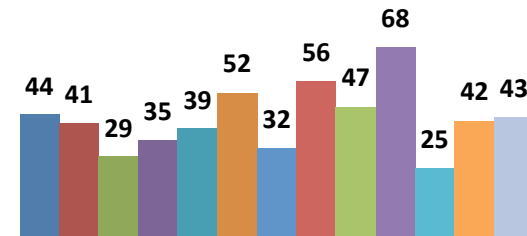
France



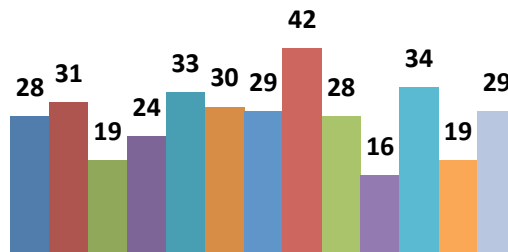
United States



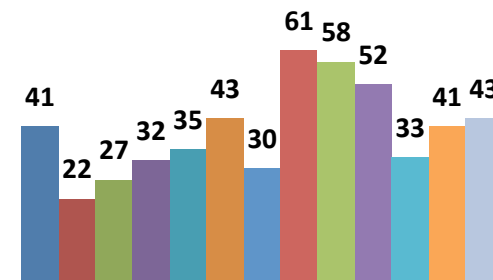
Germany



India



China



- Among All
- KSA
- UAE
- Kuwait
- Bahrain
- Qatar
- Oman
- Egypt
- Iraq
- Libya
- Lebanon
- Tunisia
- Jordan

ASDA'A Burson-Marsteller



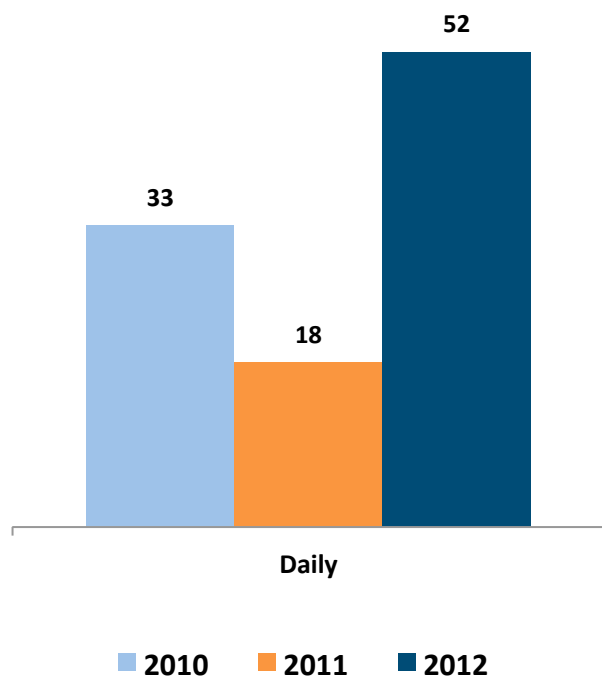
ARAB YOUTH SURVEY 2012

10

**News consumption skyrockets,
TV viewership declines & blogs are booming**

Media consumption

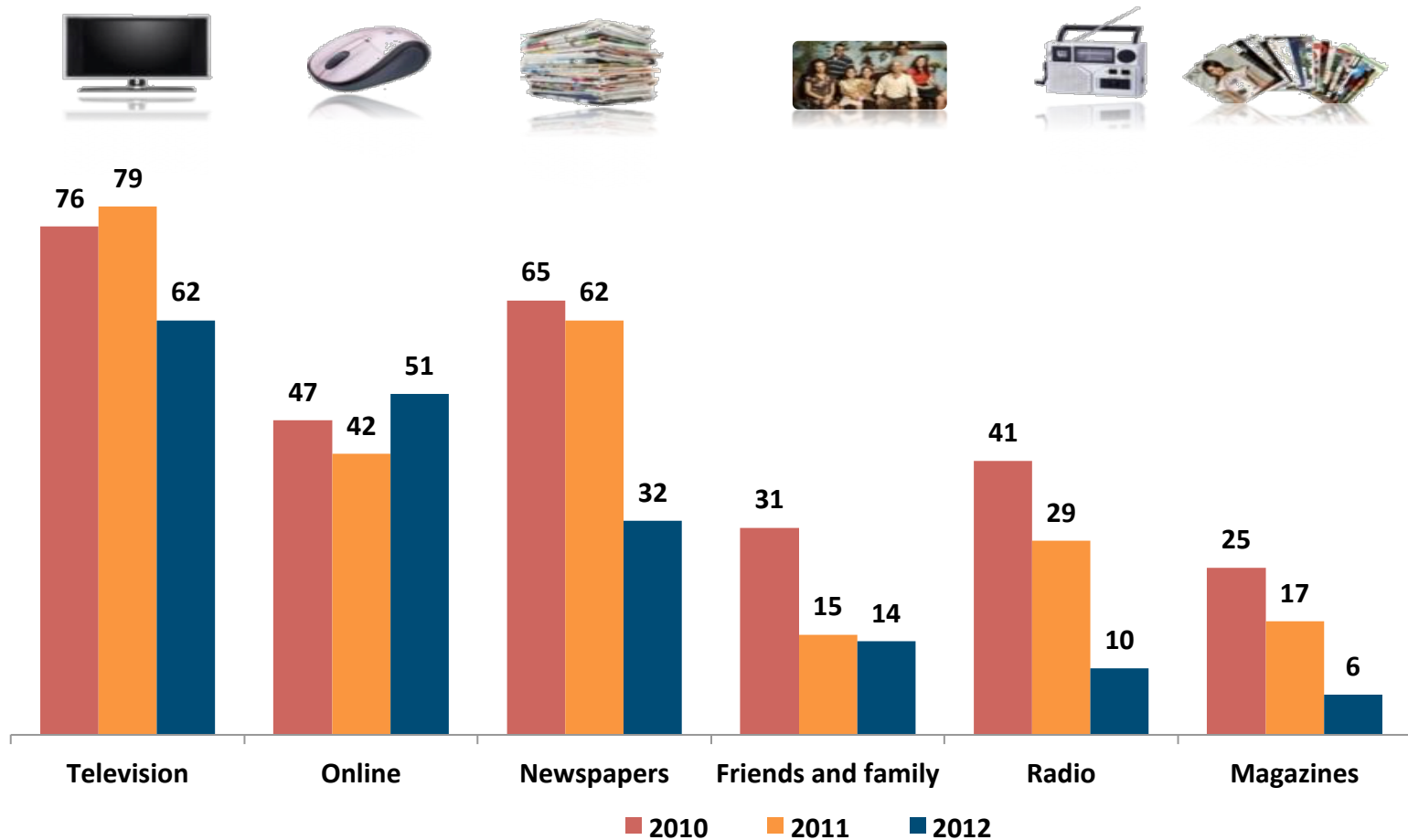
Q: How often do you update yourself on news and current affairs? (%)



Country	Daily/nearly every day 2012	Daily/nearly every day 2011
GCC	72	48
Non-GCC	73	30
Tunisia	76	-
Oman	76	43
Kuwait	75	63
Bahrain	75	37
Saudi Arabia	75	36
Libya	74	-
Jordan	72	16
Qatar	71	81
Egypt	71	48
Lebanon	71	27
Iraq	70	34
UAE	63	31

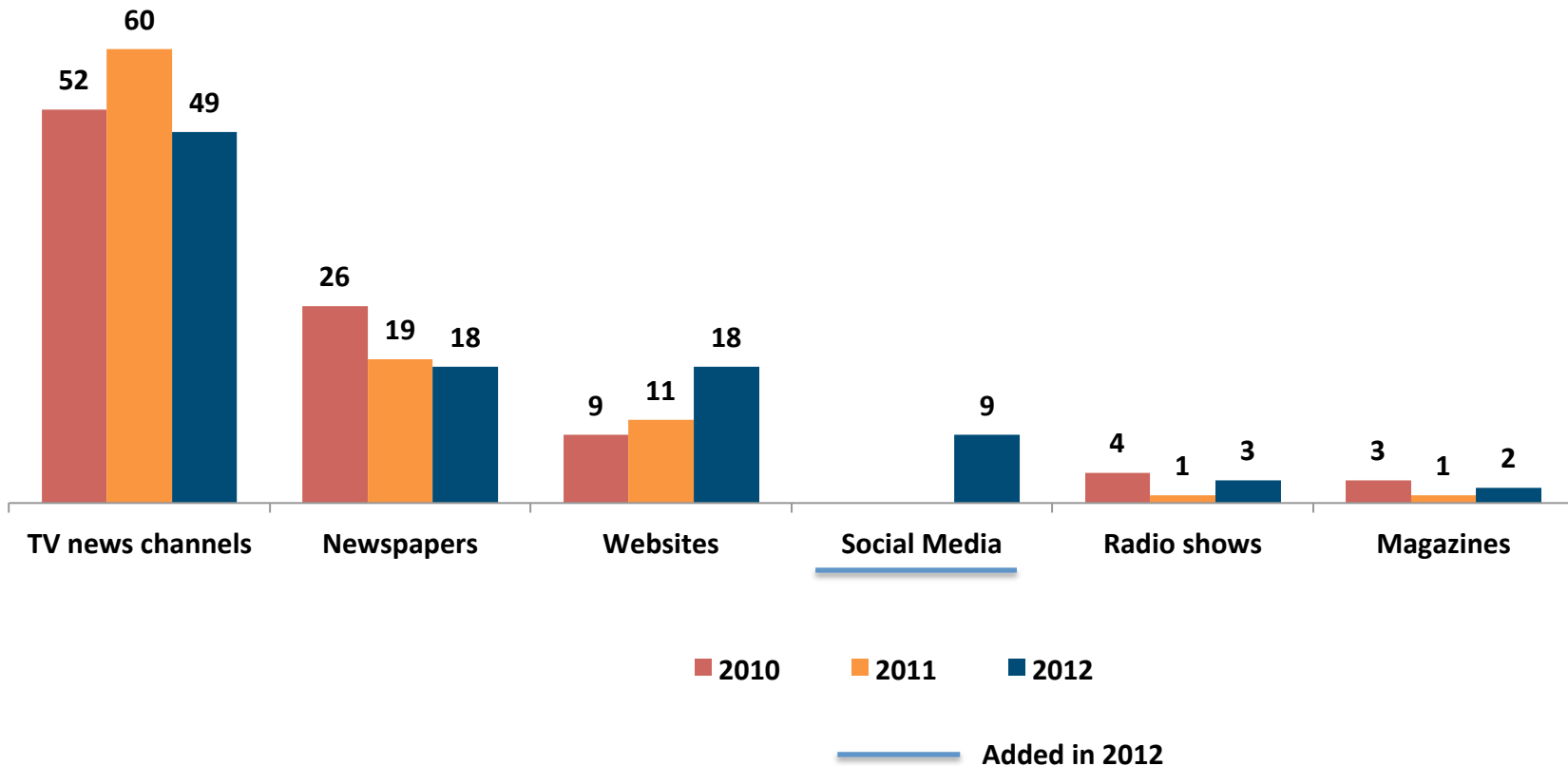
News sources

Q: Where do you get your news? (%)



Trusted news sources

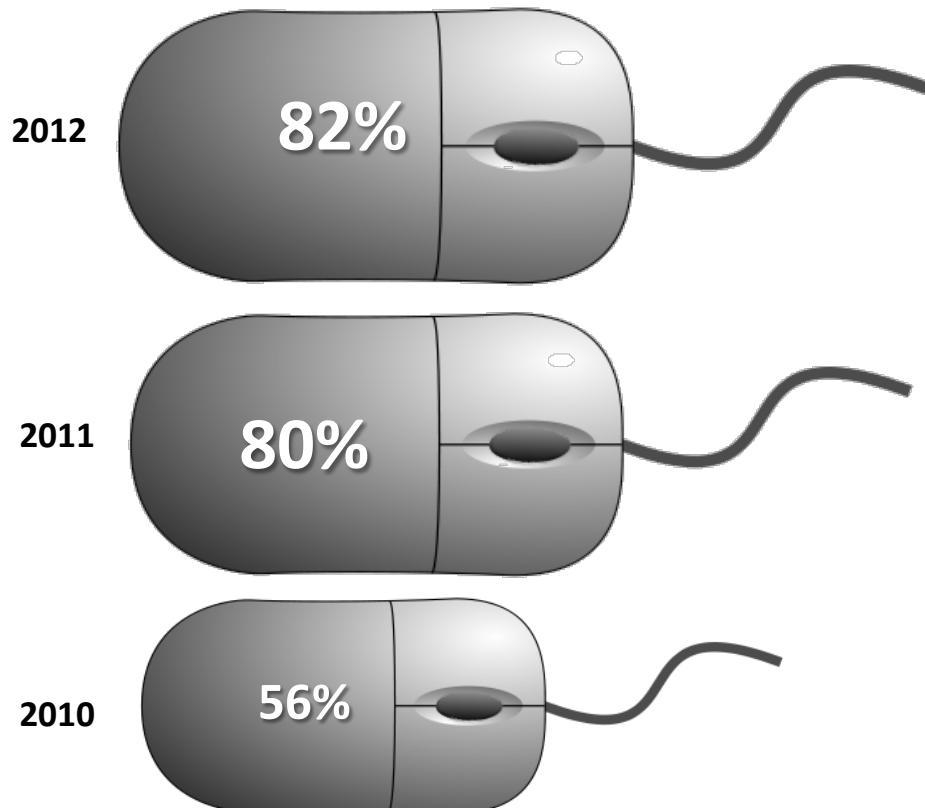
Q: In your opinion what is the most trusted source of news? (%)



Internet usage

Q: How often do you generally use the Internet?

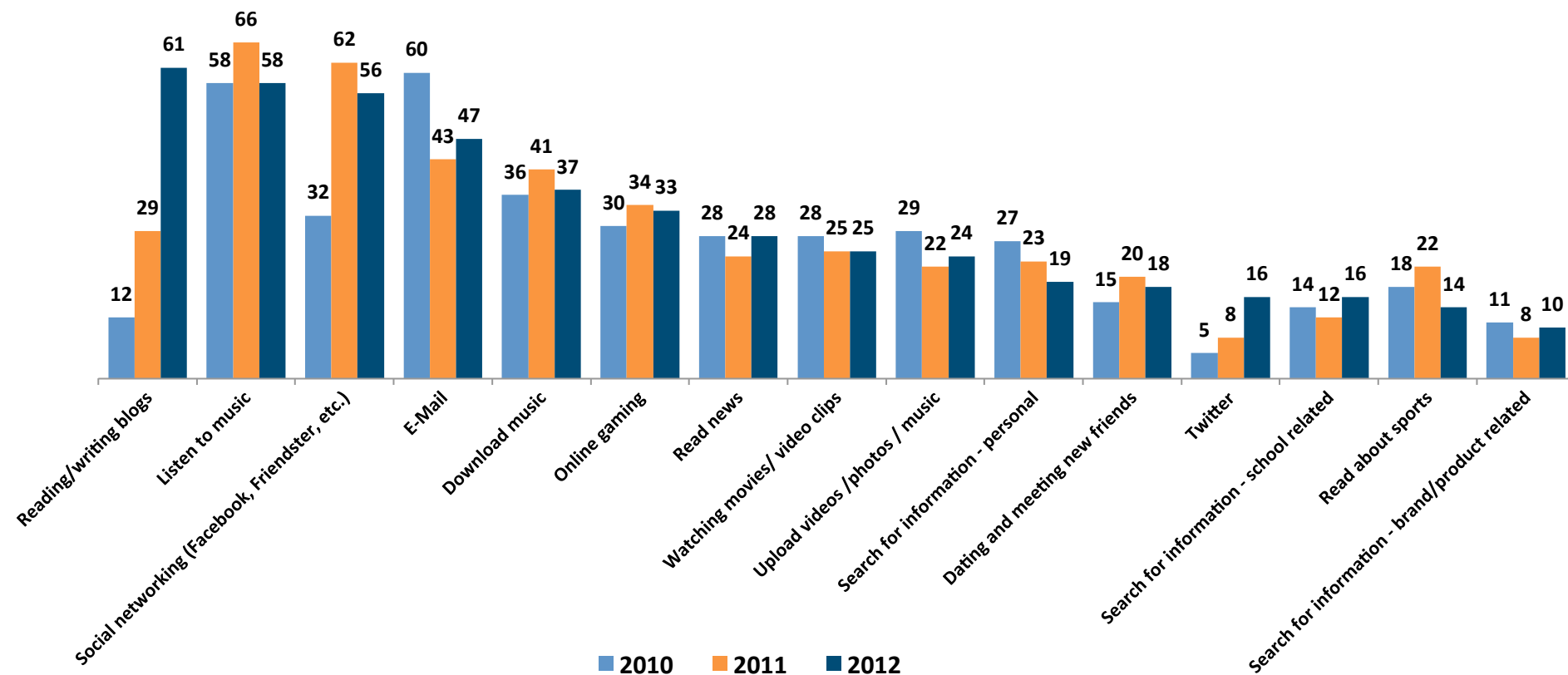
(% daily)



Country	Daily 2012	Daily 2011
GCC	82	81
Non-GCC	81	78
Saudi Arabia	91	78
UAE	87	77
Libya	86	-
Jordan	85	82
Lebanon	85	86
Bahrain	82	82
Qatar	81	92
Iraq	80	79
Egypt	79	68
Tunisia	79	-
Kuwait	78	79
Oman	77	82

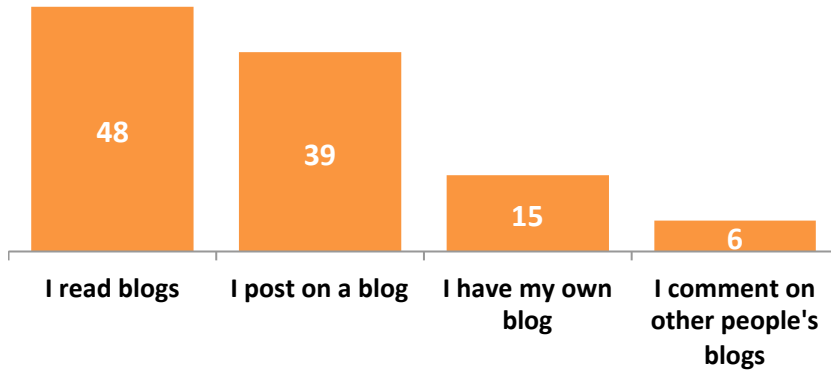
Internet usage

Q: What do you do when you are online? (%)

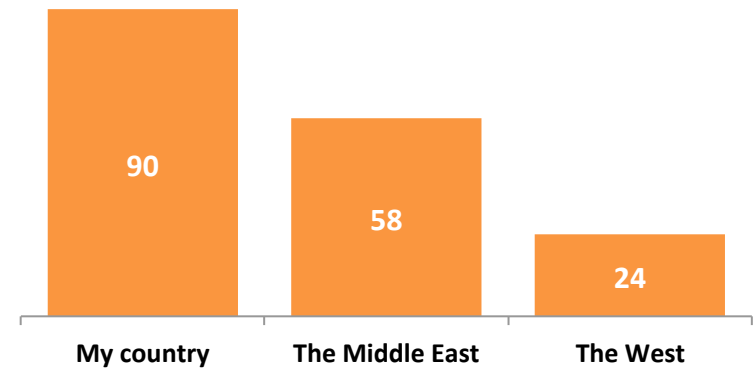


Blogs

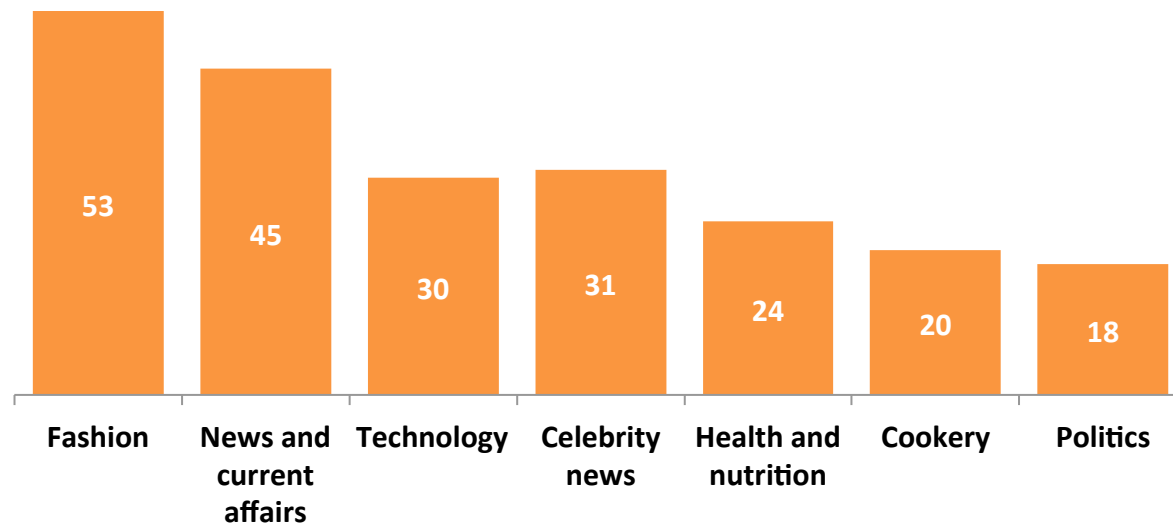
Q: What do you do on blogs? (%)



Q: Where do the blogs that you read come from? (%)



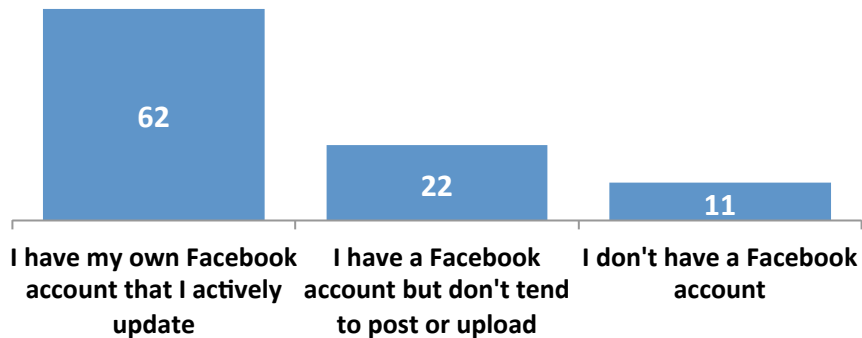
Q: What kinds of blogs do you read? (%)



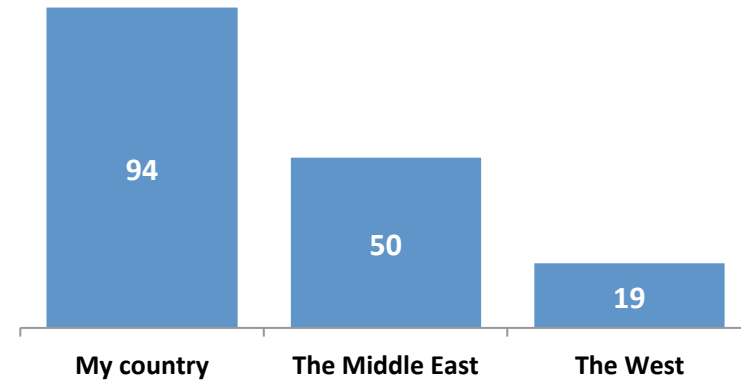
Base: All who blog

Facebook

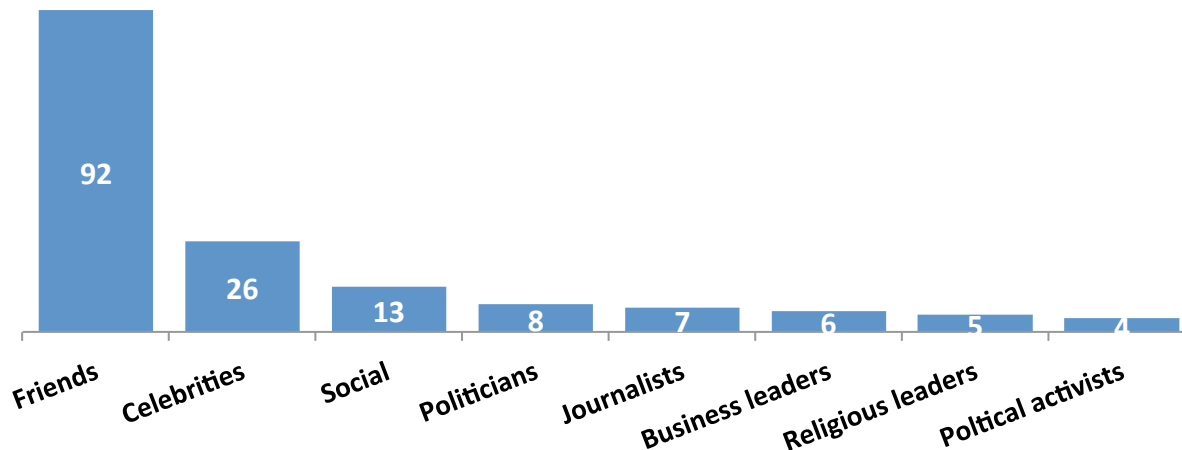
Q: Thinking about social networking, which of the following applies to you? (%)



Q: Where do the people you are friends with come from? (%)

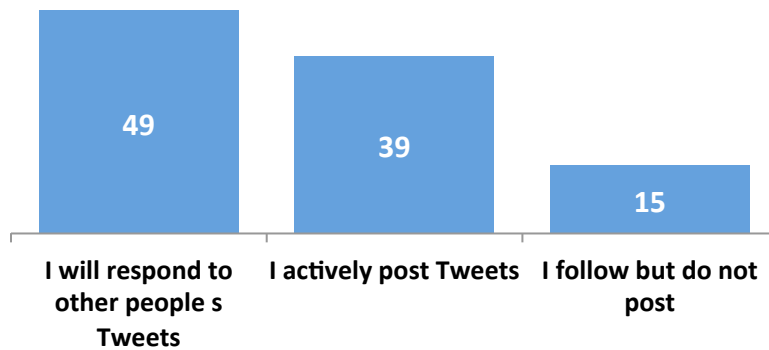


Q: Who are the types of people that you are friends with on Facebook? (%)

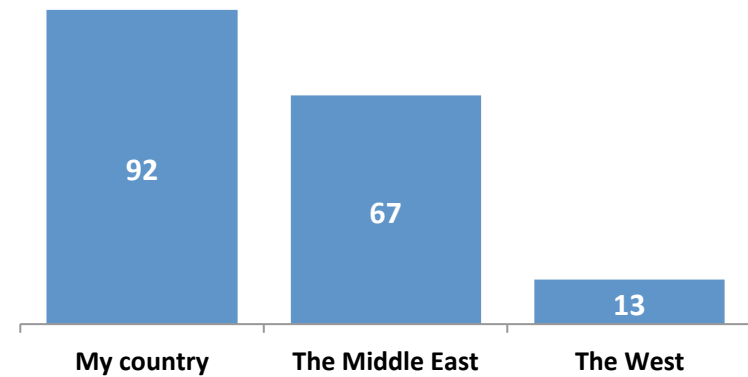


Base: All who use Facebook

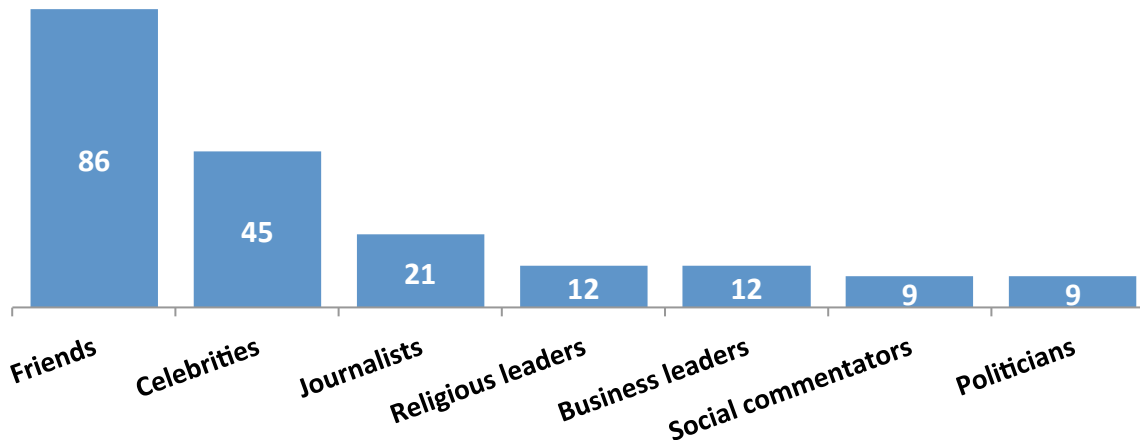
Q: Thinking about Twitter, which of the following applies to you? (%)



Q: Where do the people you follow on Twitter come from? (%)



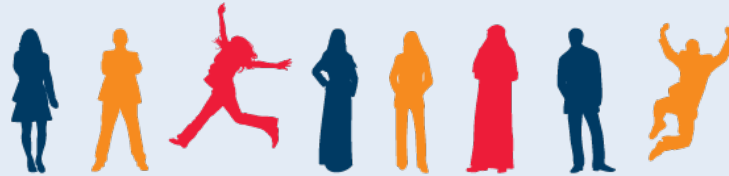
Q: Who are the types of people that you tend to follow? (%)



Base: All who use Twitter

After the Spring

ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2012

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