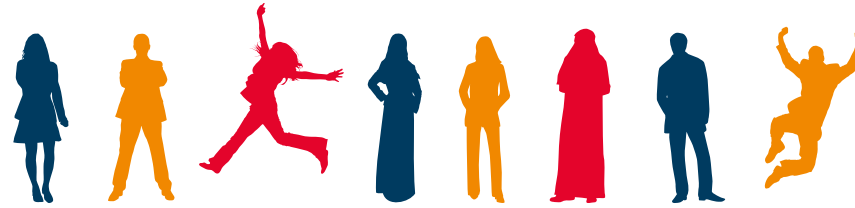


ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2013

OUR BEST DAYS ARE AHEAD OF US

April 9, 2013

www.arabyouthsurvey.com

Algeria Bahrain Egypt Iraq Jordan Kuwait Lebanon Libya Morocco Oman Qatar Saudi Arabia Tunisia UAE Yemen

ASDA'A Burson-Marsteller commissioned Penn Schoen Berland (PSB) to carry out the survey among Arab national youth aged 18-24 in 15 Middle East countries: the six countries of the Gulf Cooperation Council (Saudi Arabia, UAE, Qatar, Bahrain, Qatar and Kuwait), Jordan, Lebanon, Egypt, Iraq, Libya, Tunisia – and, for the first time, Algeria, Morocco and Yemen.

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 in December 2012. The interviews took place from 13 Dec 2012 to 14 Jan 2013. Sample details are given below:

ORIGINAL COUNTRIES 2008-2010

UAE N=250	OMAN N=150	QATAR N=200	BAHRAIN N=200	KSA N=250	KUWAIT N=200	EGYPT N=250	JORDAN N=200	LEBANON N=200
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 30%	Alexandria 25%	Irbid 25%	West Beirut 40%
Abu Dhabi 40%				Dammam 20%	Al Ahmadi 20%	Mansoura 25%	Zarqa 25%	Tripoli 20%
					Al Farwaniya 30%			

NEW IN 2011

NEW IN 2012

NEW IN 2013

IRAQ
N=200

TUNISIA
N=200

LIBYA
N=200

ALGERIA
N=150

MOROCCO **YEMEN**
N=200 N=150

Baghdad
50%

Tunis
50%

Tripoli
50%

Algiers
50%

Fes
25%

Sana'a
50%

Irbil
25%

Sfax
25%

Benghazi
25%

Oran
25%

Salé
25%

Al Hudaydah
25%

Basrah
25%

Susah
25%

Misrata
25%

Constantine
25%

Marrakech
25%

Ta'izz
25%

Casablanca
25%

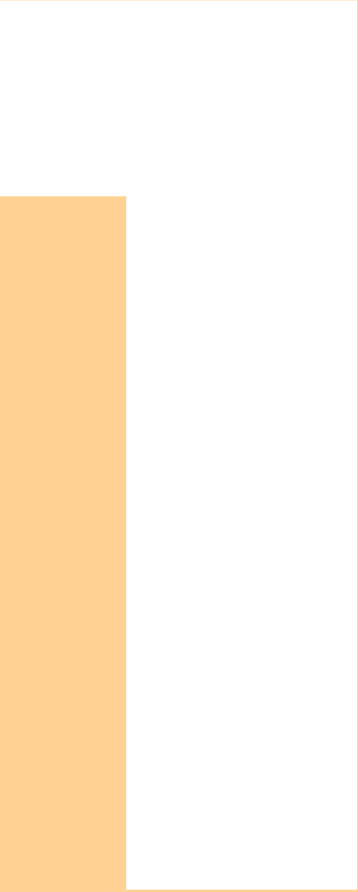
2008 RESEARCH WAS CONDUCTED BY NIELSEN USING AN ONLINE METHODOLOGY.

ALL RESEARCH FROM 2009 ONWARDS WAS COMPLETED FACE-TO-FACE.

2013 DATA IS WEIGHTED BY MARKET TO ENSURE EQUAL REPRESENTATION WITHIN THE SAMPLE.



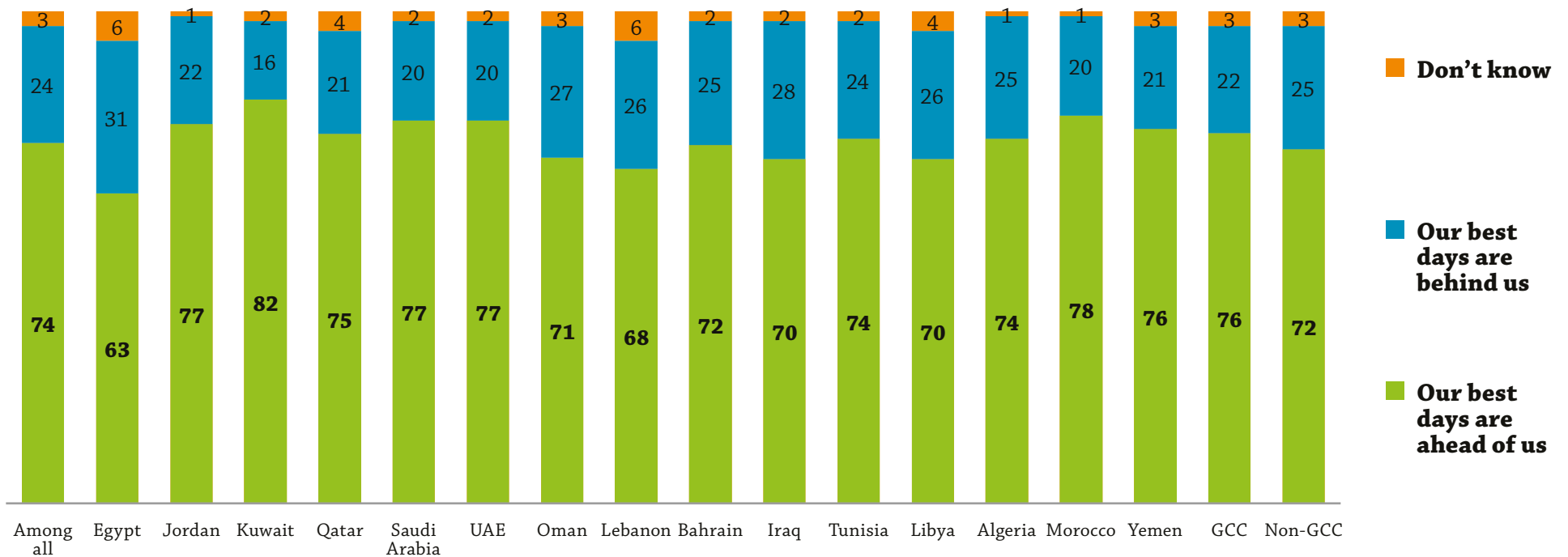
TOP 10 FINDINGS



Majority of
Arab youth
believe that
“our best days
are ahead of us”.

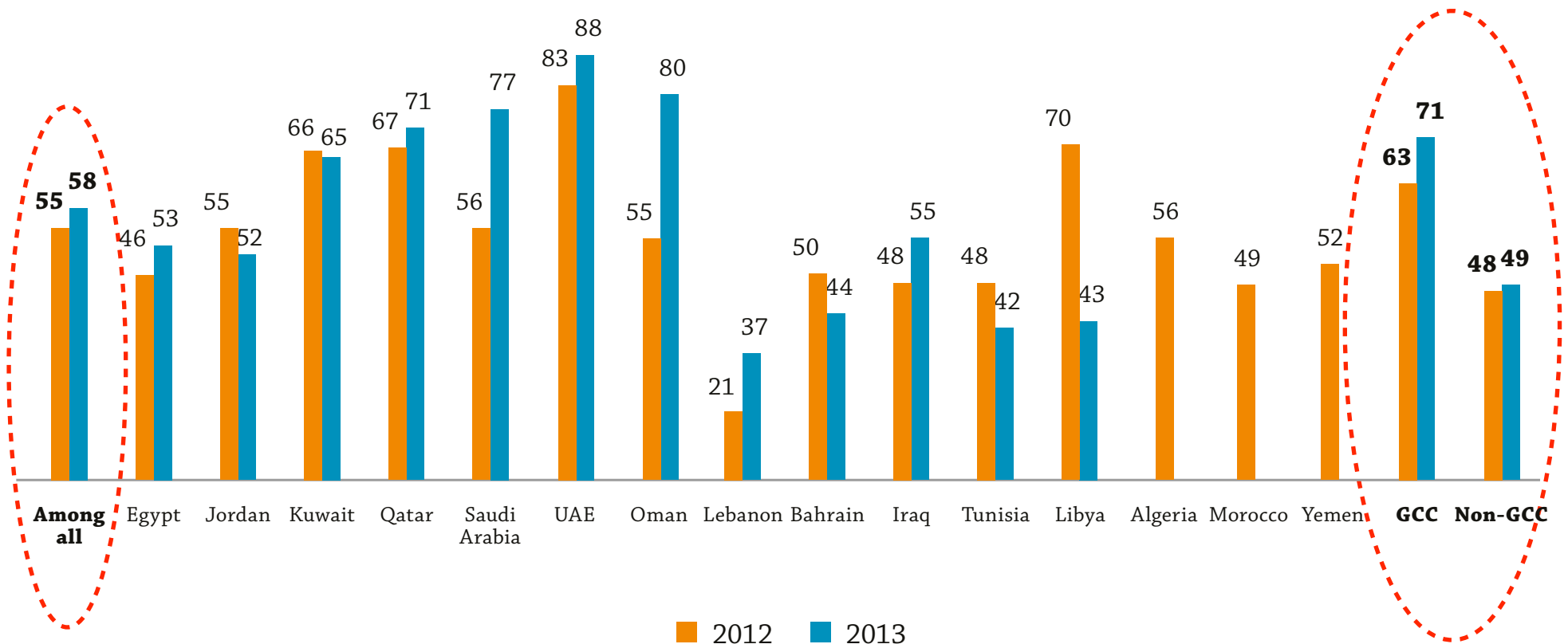
GENERAL OUTLOOK

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



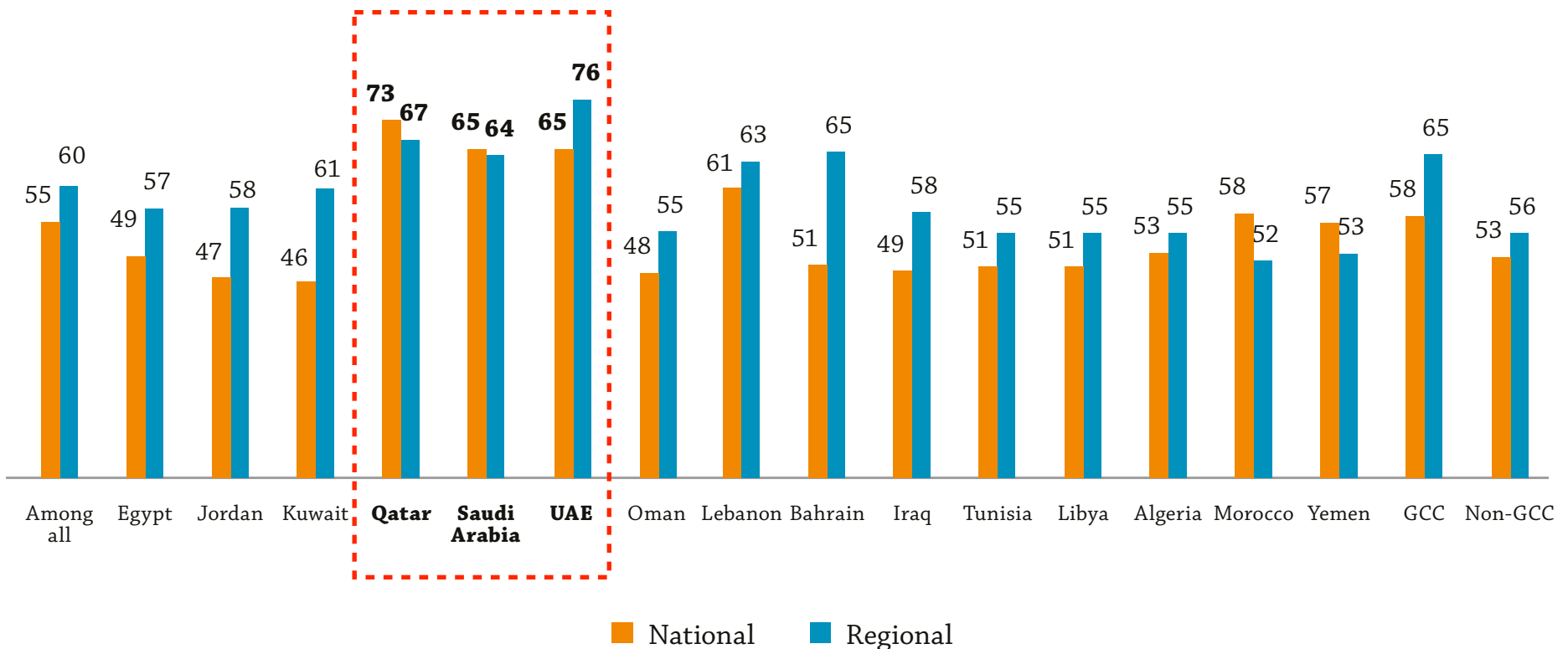
GENERAL OUTLOOK

Q: Considering the last 12 months, do you think things in your country of residence are now heading in the right direction or are they going in the wrong direction? (*Right direction*) %



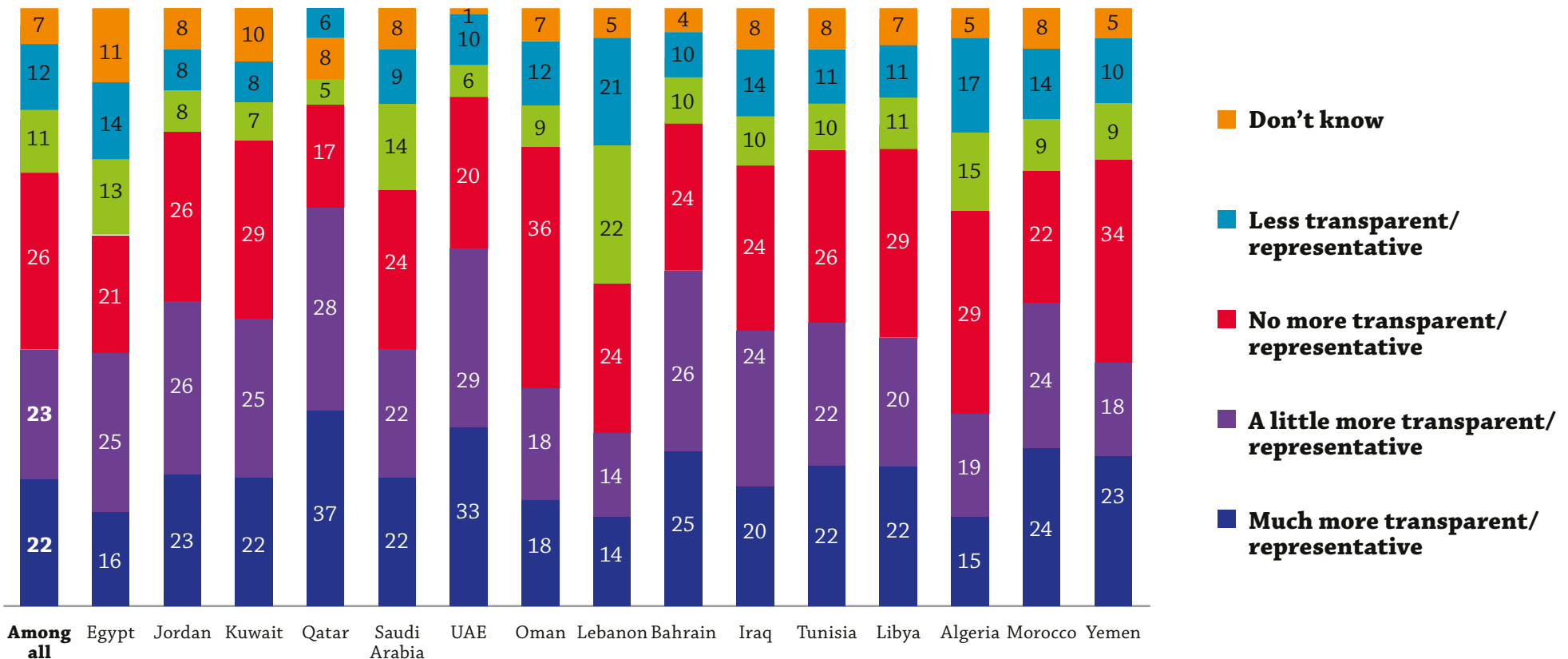
DIRECTION OF ECONOMY

Q: In general, do you think the economy in your country / the region is going in the right direction or in the wrong direction?



IMPACT OF ARAB SPRING

Q: Since the start of the events of the Arab Spring (in late 2010/early 2011), do you believe that your government has become:

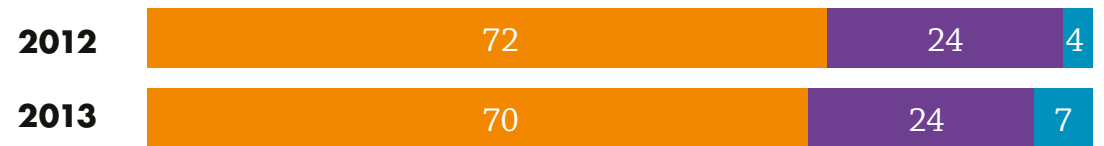


IMPACT OF ARAB SPRING

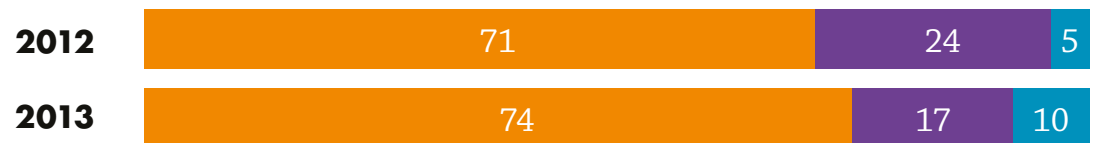
Q: How far do you agree or disagree with the following? (%)

■ Agree a lot / somewhat ■ Disagree a lot / somewhat ■ Don't know

Following the uprisings across the Arab world, I feel the **Arab world is better off**




As a result of the uprising, I feel I **will be better off in five years**



Following the uprising, I **am personally better off now than I was a year ago**





Arab youth have
more national
pride since the
Arab Spring.

IMPACT OF ARAB SPRING

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

■ Agree a lot / somewhat ■ Disagree a lot / somewhat ■ Don't know

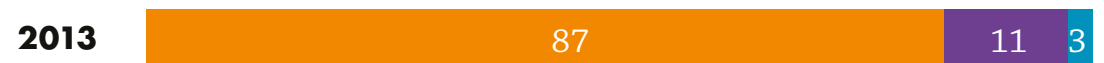
Recent changes in my country make me **feel anxious about what the future holds**



Following the uprising in the Arab world, I **feel uncertain about the future of my country**

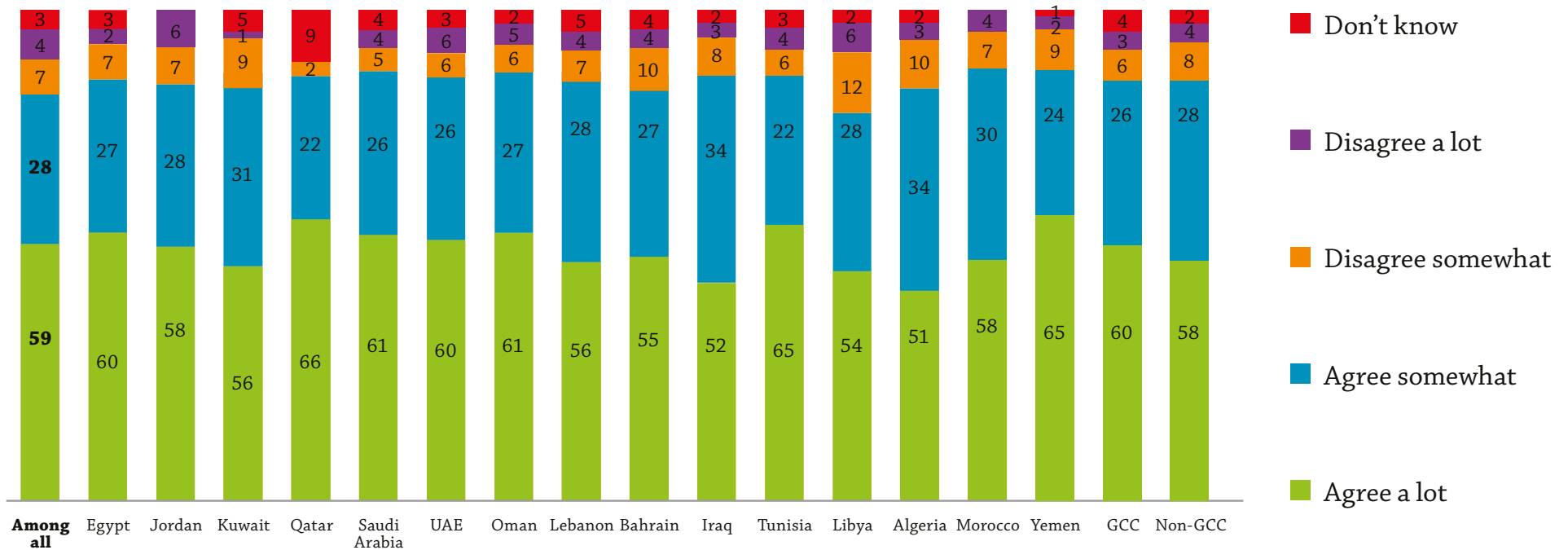


Following the events of the Arab Spring, I **am more proud to be an Arab**



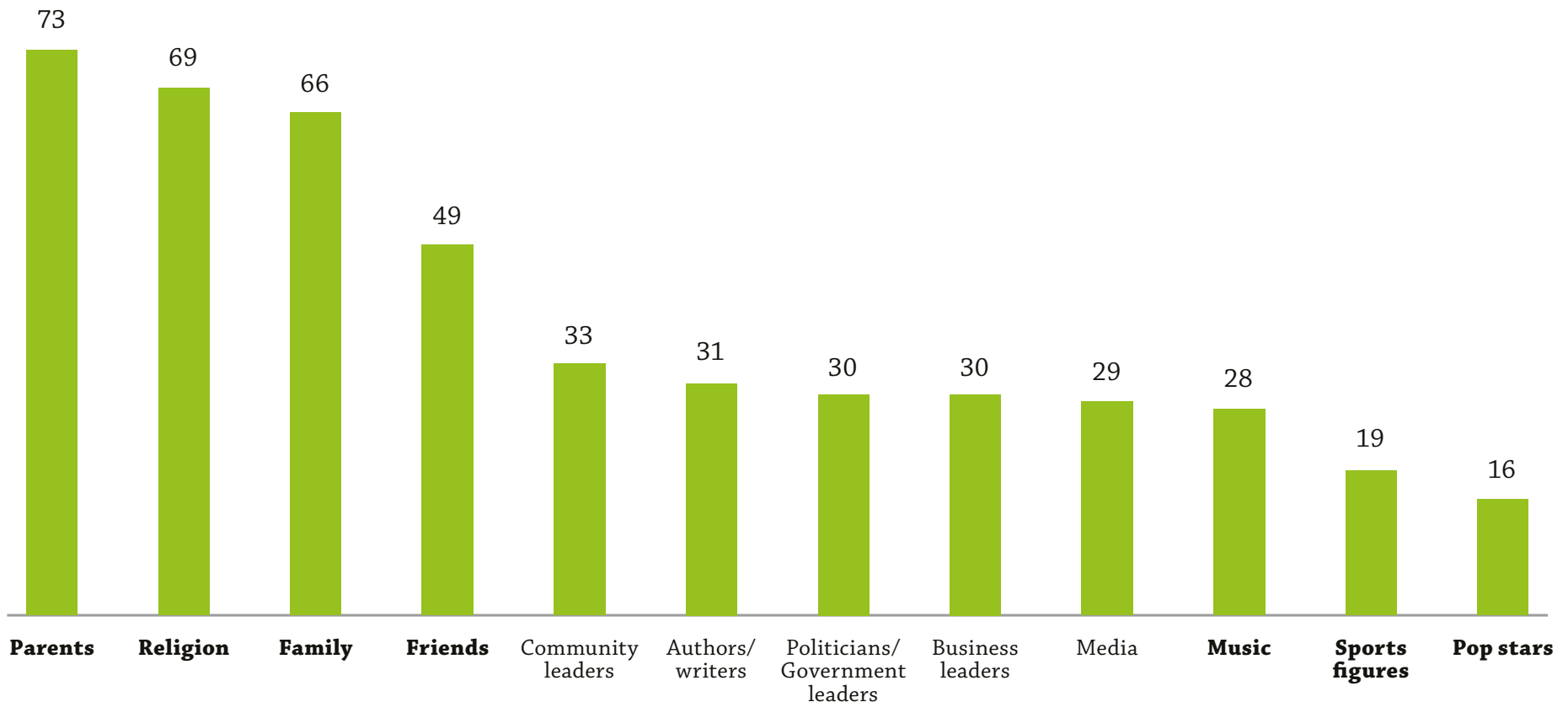
IMPACT OF ARAB SPRING

Q: How far do you agree or disagree with the following? “Following the events of the Arab Spring, I am more proud to be an Arab” (%)



INFLUENCERS

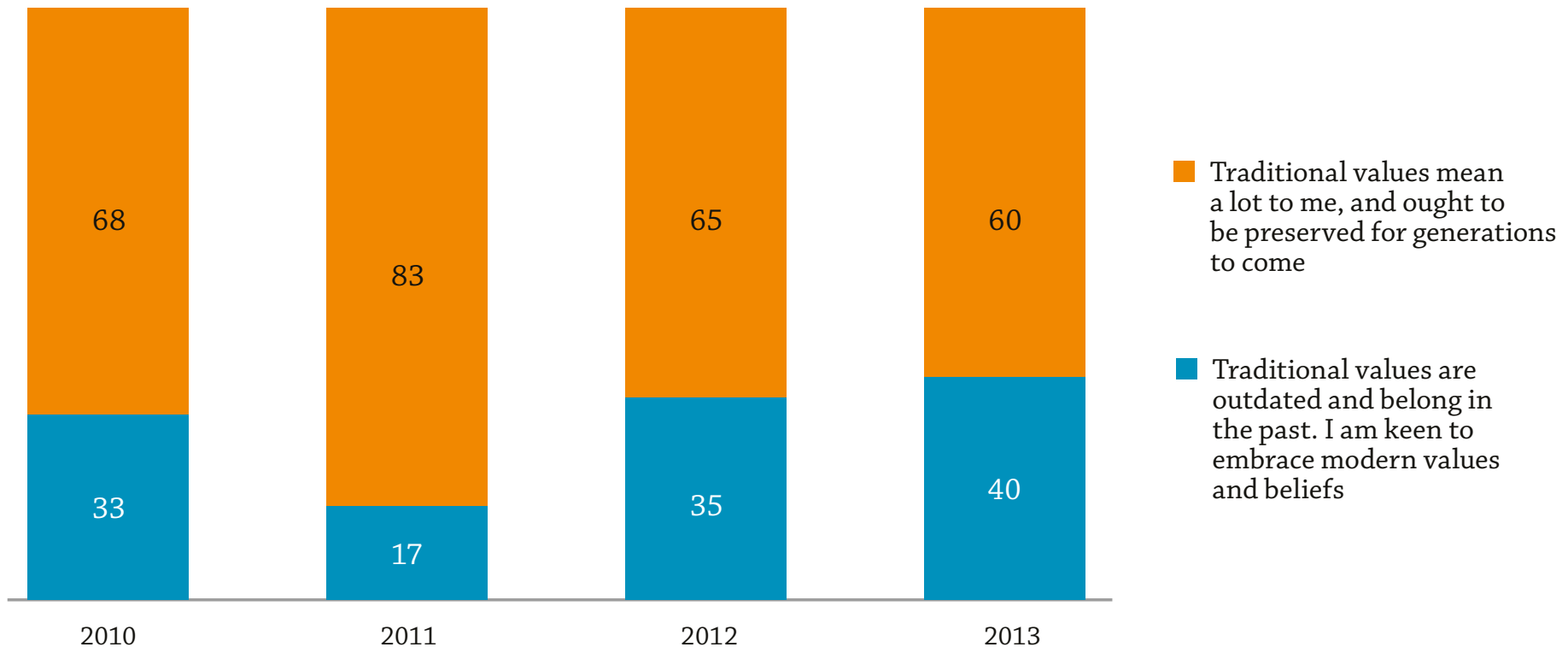
Q: How far would you say each of the following influences you and your outlook on life? (% very influential)



Base: Among All (don't knows filtered)

VALUES & BELIEFS

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



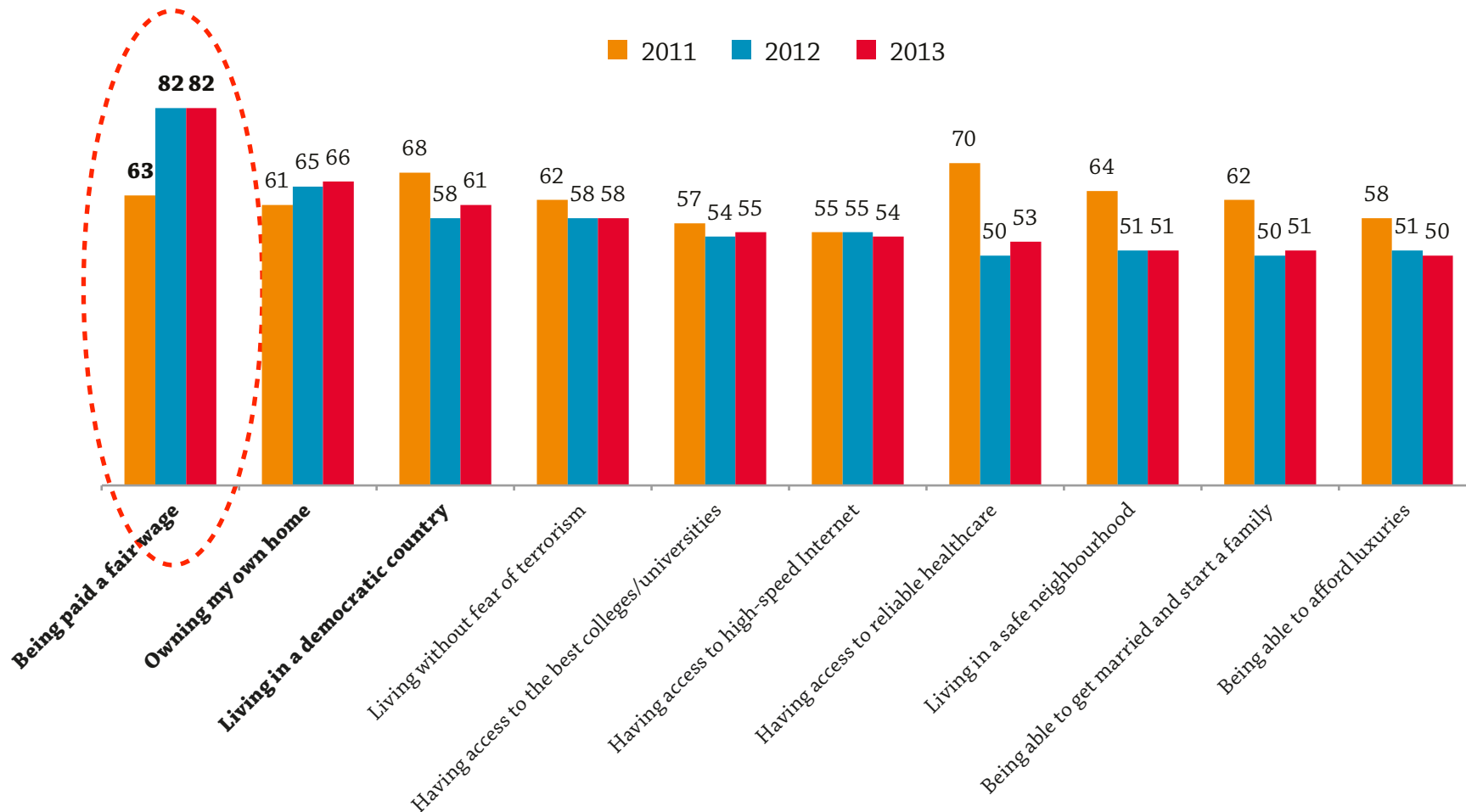
Base: Among All

3

Fair pay
remains the
top priority
of Arab youth

IMPORTANCE OF FAIR PAY

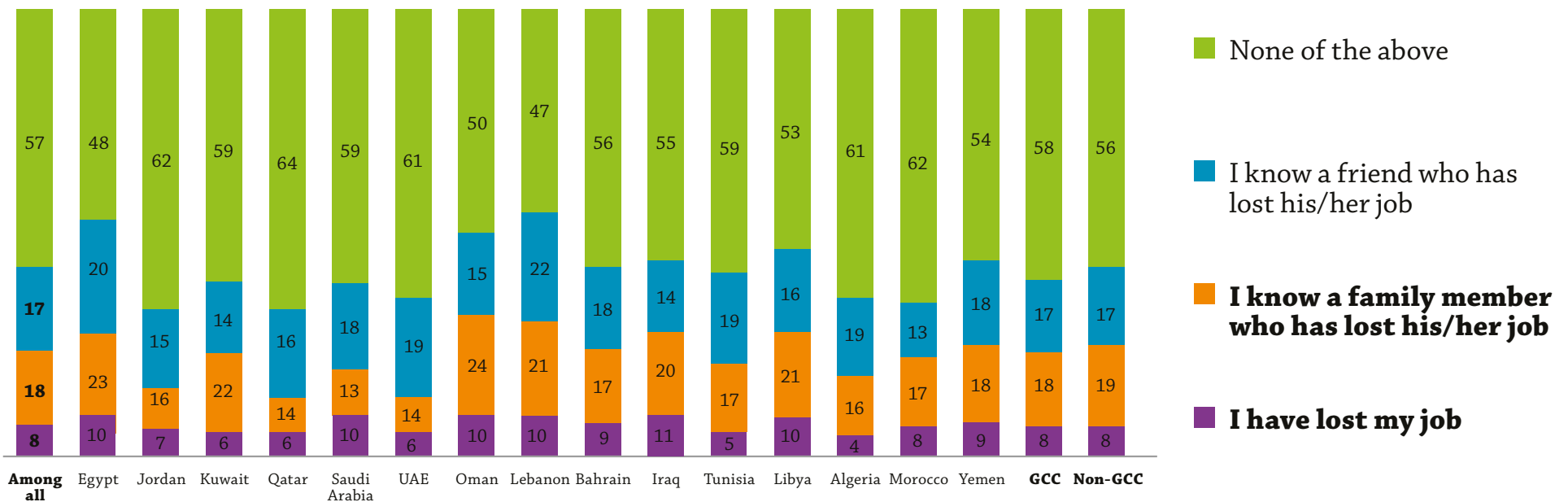
Q: How important are each of the following to you? Top 10 (% very important)



Base: Among All (don't knows filtered)

JOB SECURITY

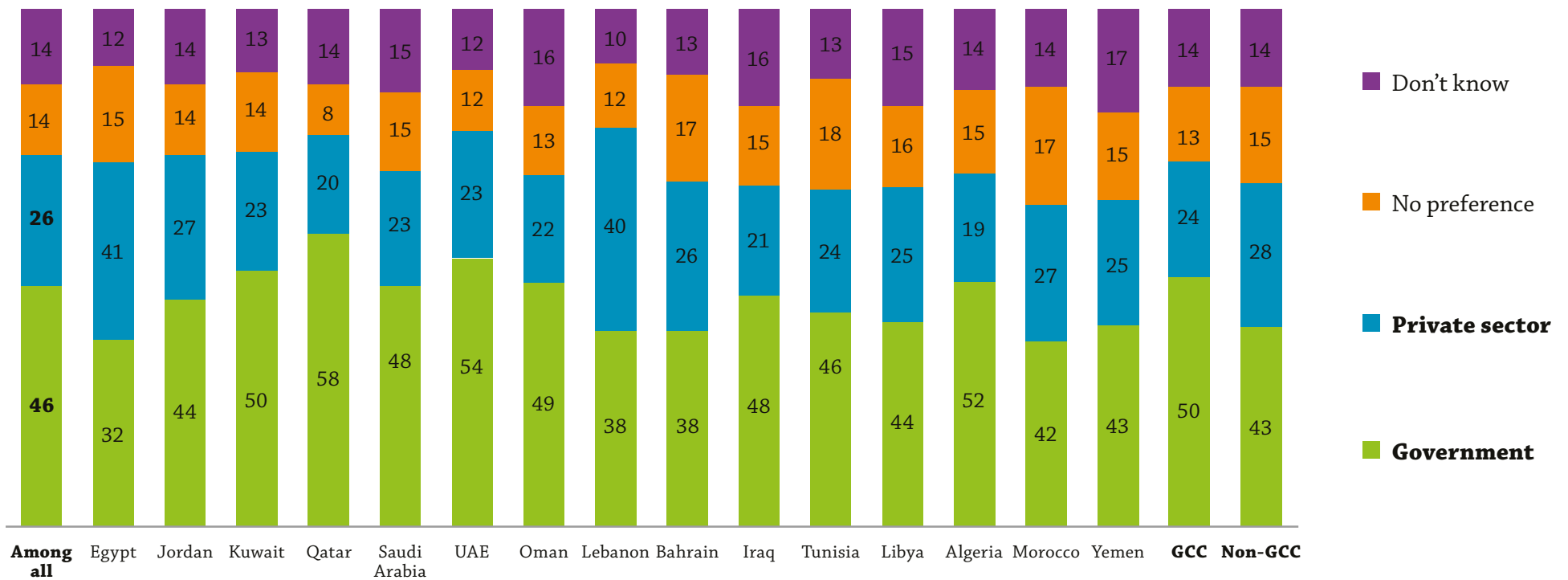
Q: Which of the following is closest to your experience in the past 12 months?



Base: Among All

PREFERRED EMPLOYER

Q: Would you prefer to work in government or for the private sector?



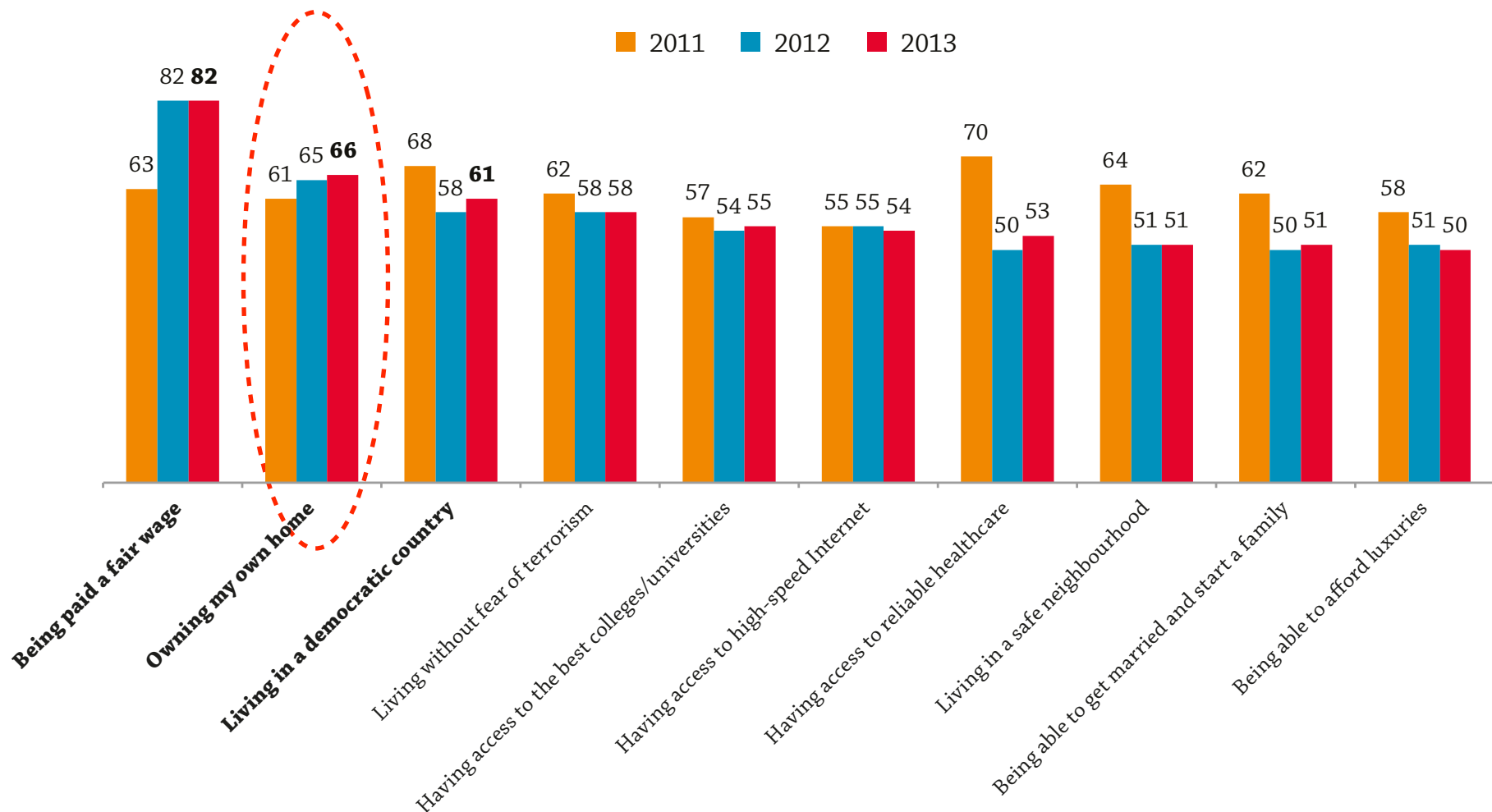
Base: Among All

4

Home
ownership is
increasingly
important

HOME OWNERSHIP

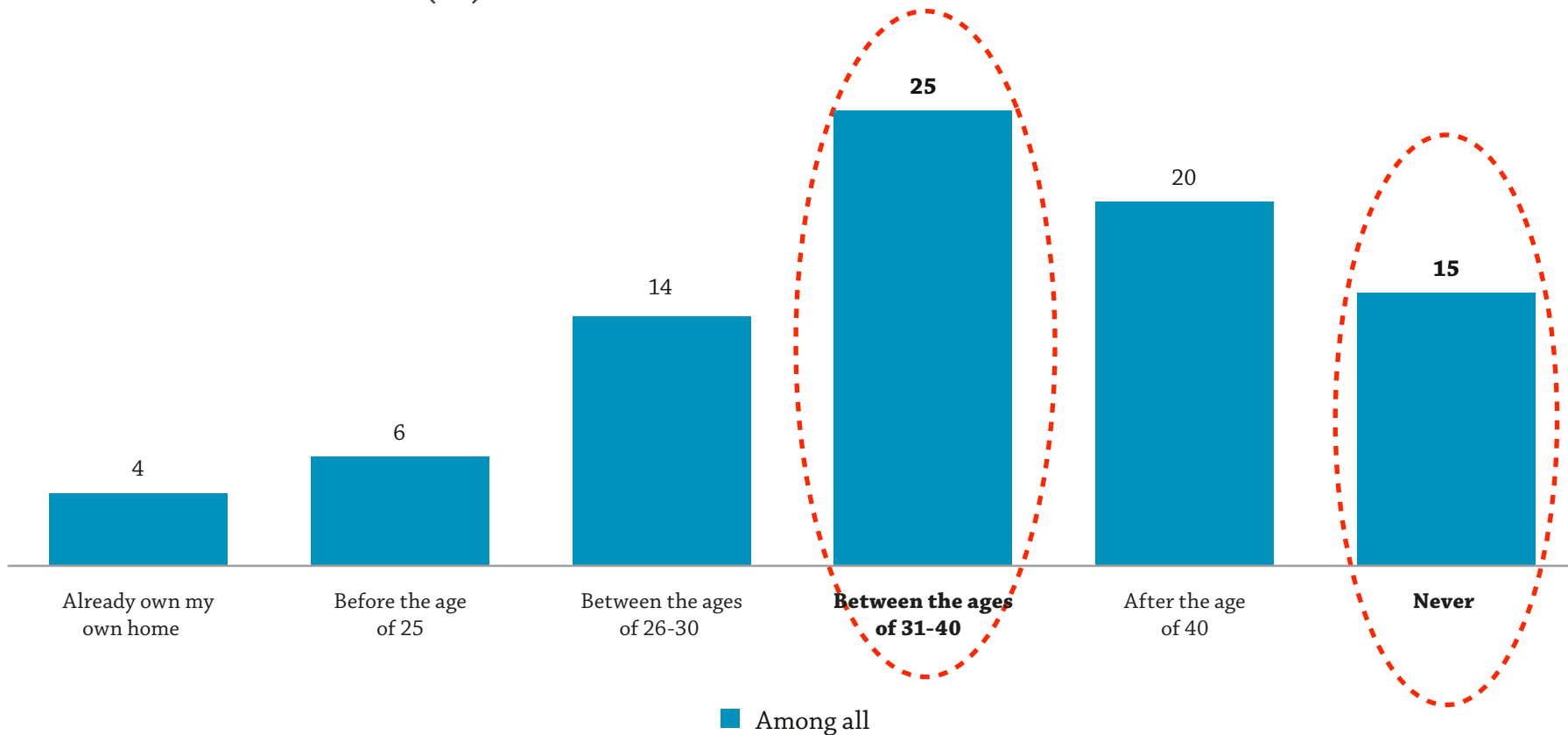
Q: How important are each of the following to you? Top 10 (% very important)



Base: Among All (don't knows filtered)

AGE OF FIRST-TIME BUYERS

Q: At what age do you expect to purchase your own home? (%)



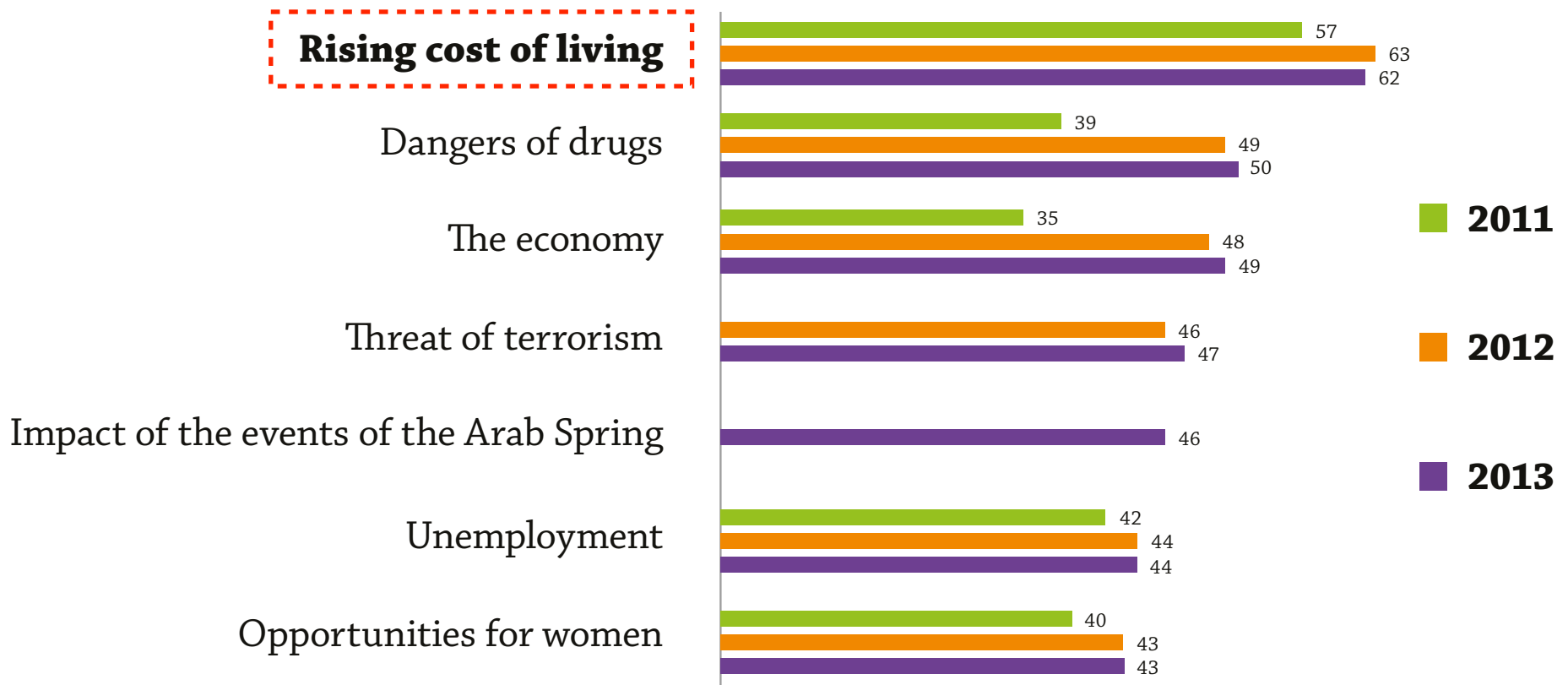
Not including "Don't know"

5

Rising living
costs continue
to be the top
concern
among Middle
East youth

KEY CONCERNS

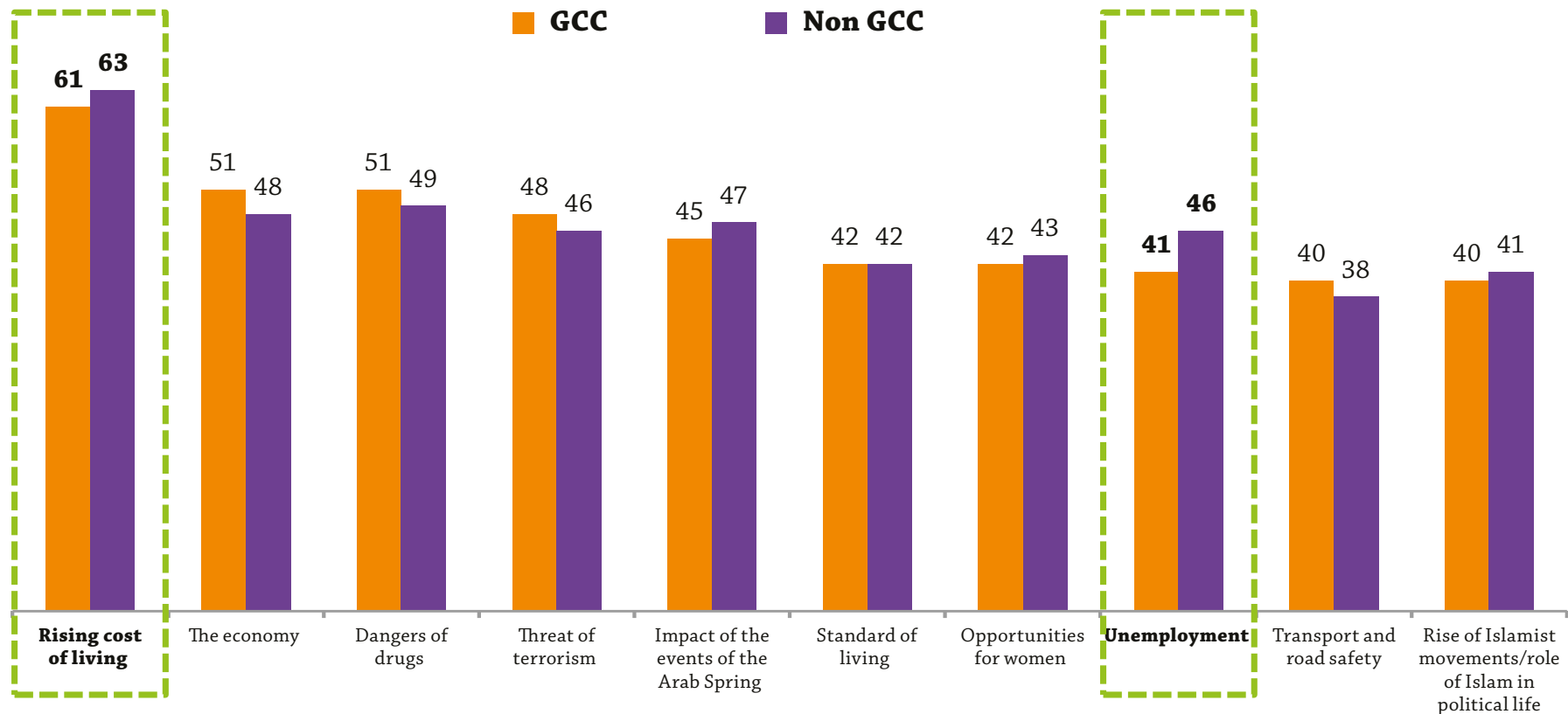
Q: How concerned would you say you are about each of the following issues? (% very concerned)



Base: Among All (don't know filtered)

KEY CONCERNS

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



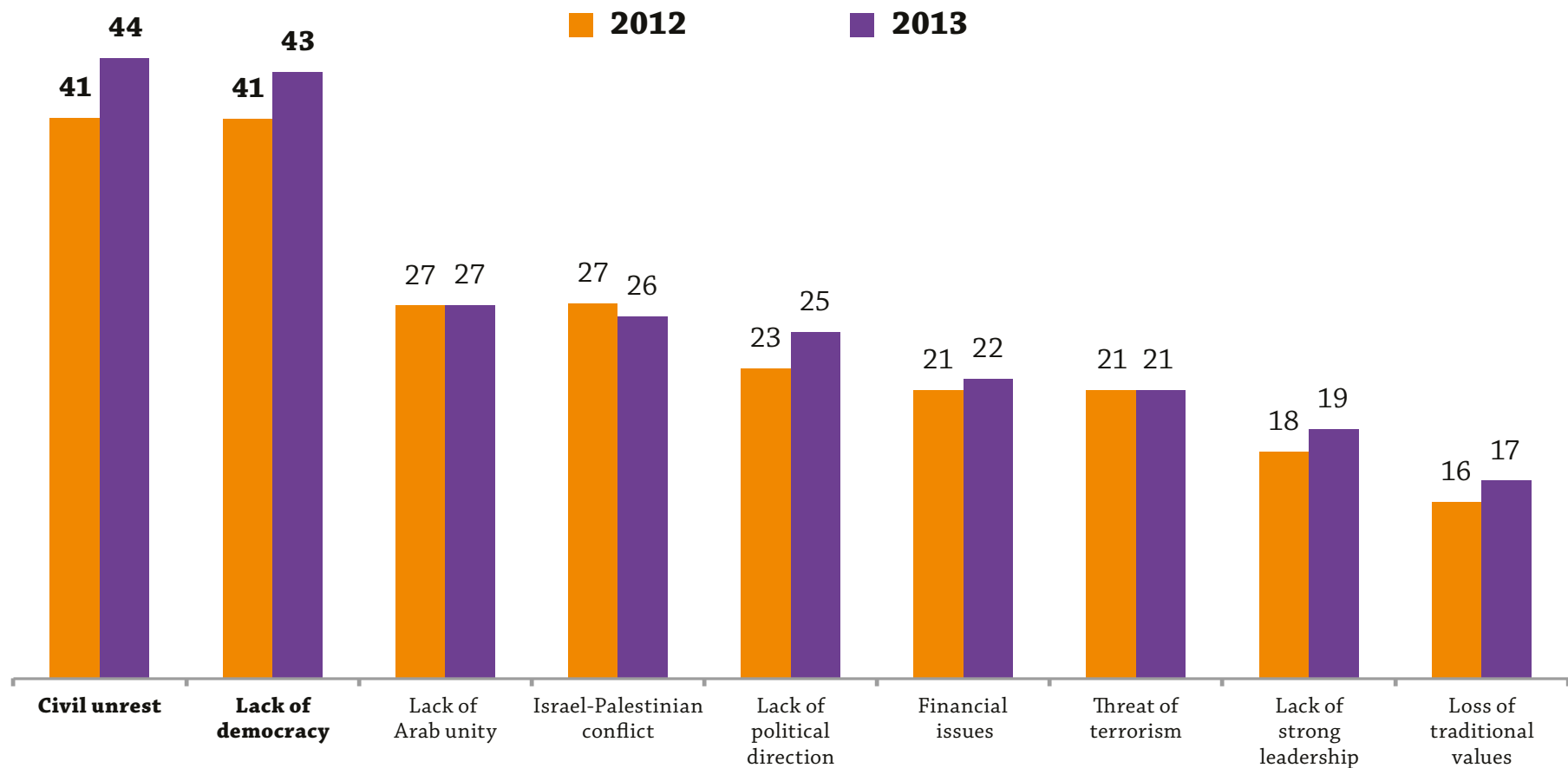
Base: Among All (don't know filtered)




Civil unrest
and lack of
democracy are
the biggest
barriers facing
the region

OBSTACLES FACING MIDDLE EAST

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



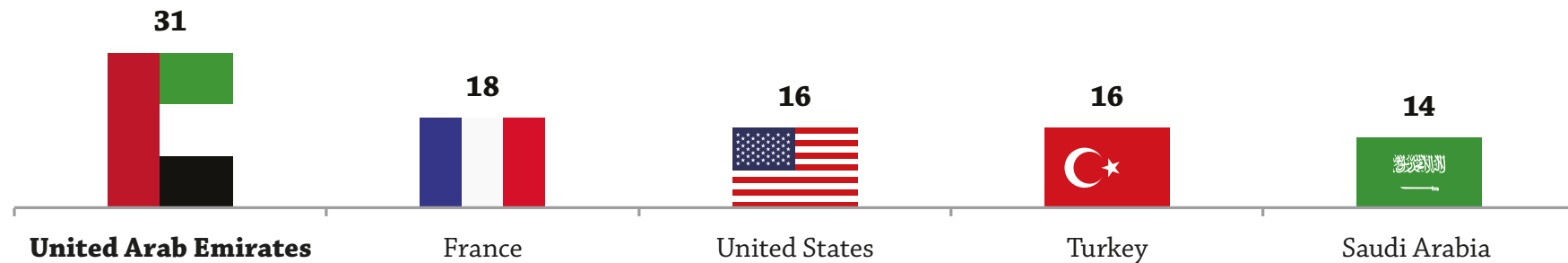
Base: Among All



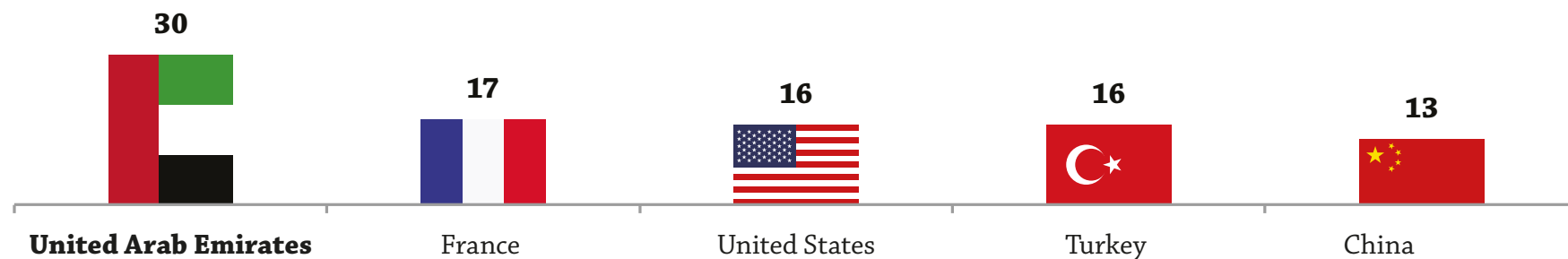
The UAE
continues to
be seen as a
model nation

MODEL NATIONS

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

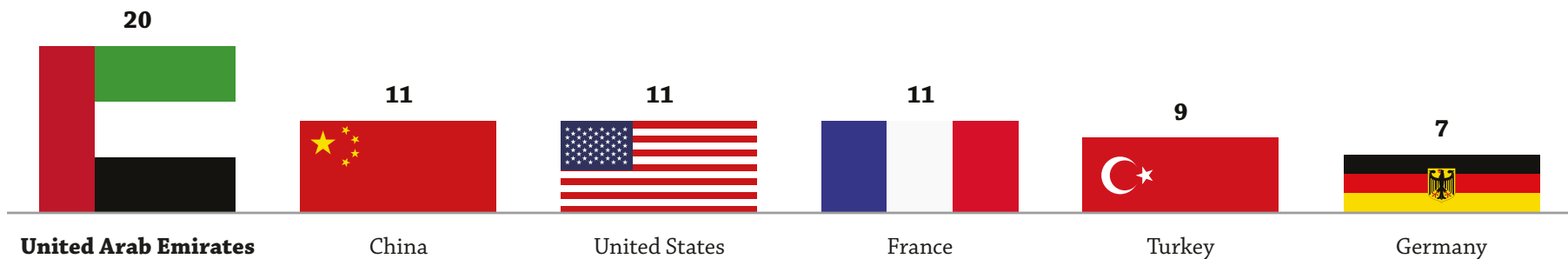


Q: Which country in the world would you most like your country to be like? (%)



MODEL NATIONS

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

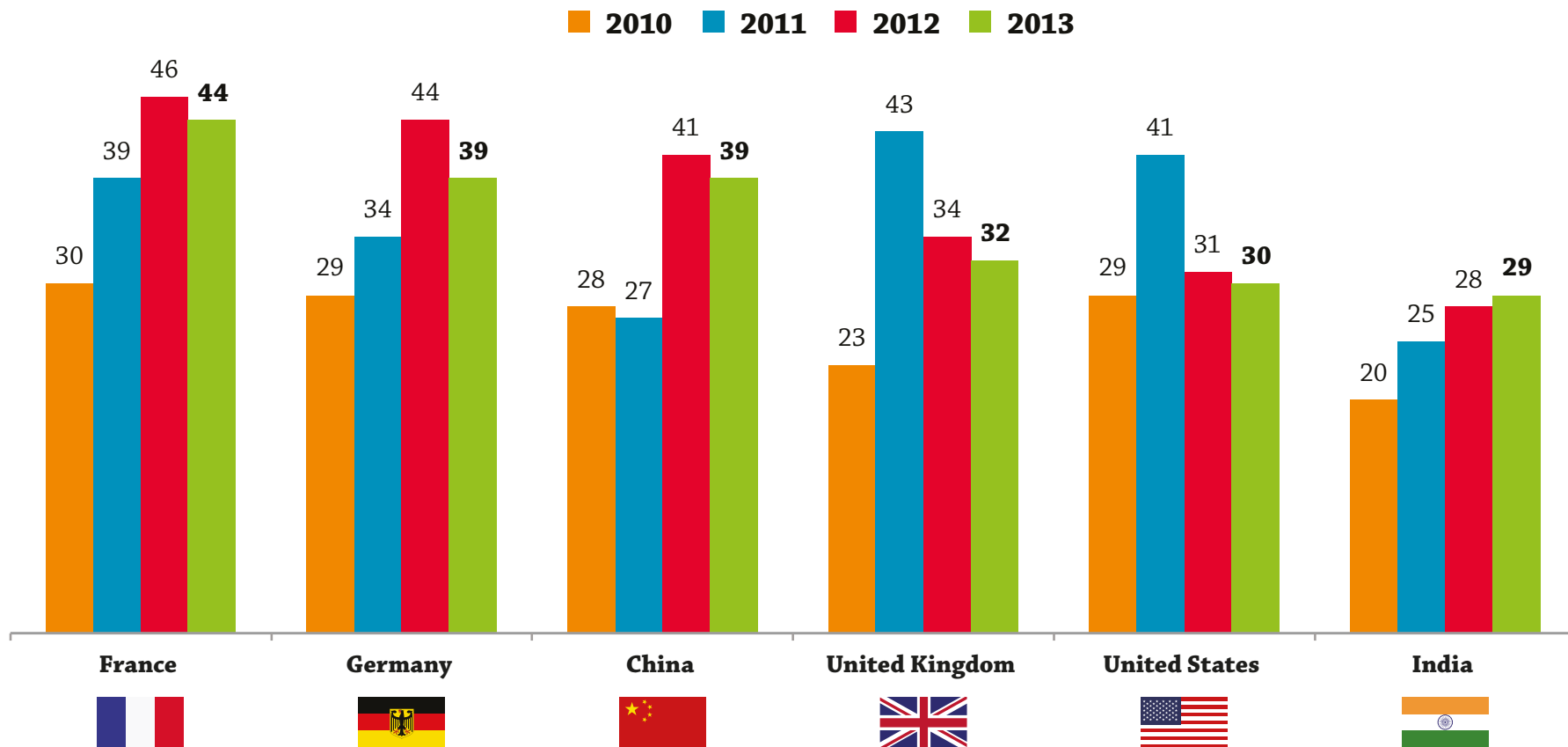




Among nations
outside MENA,
France regarded
most favourably
by Arab youth

MODEL NATIONS

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



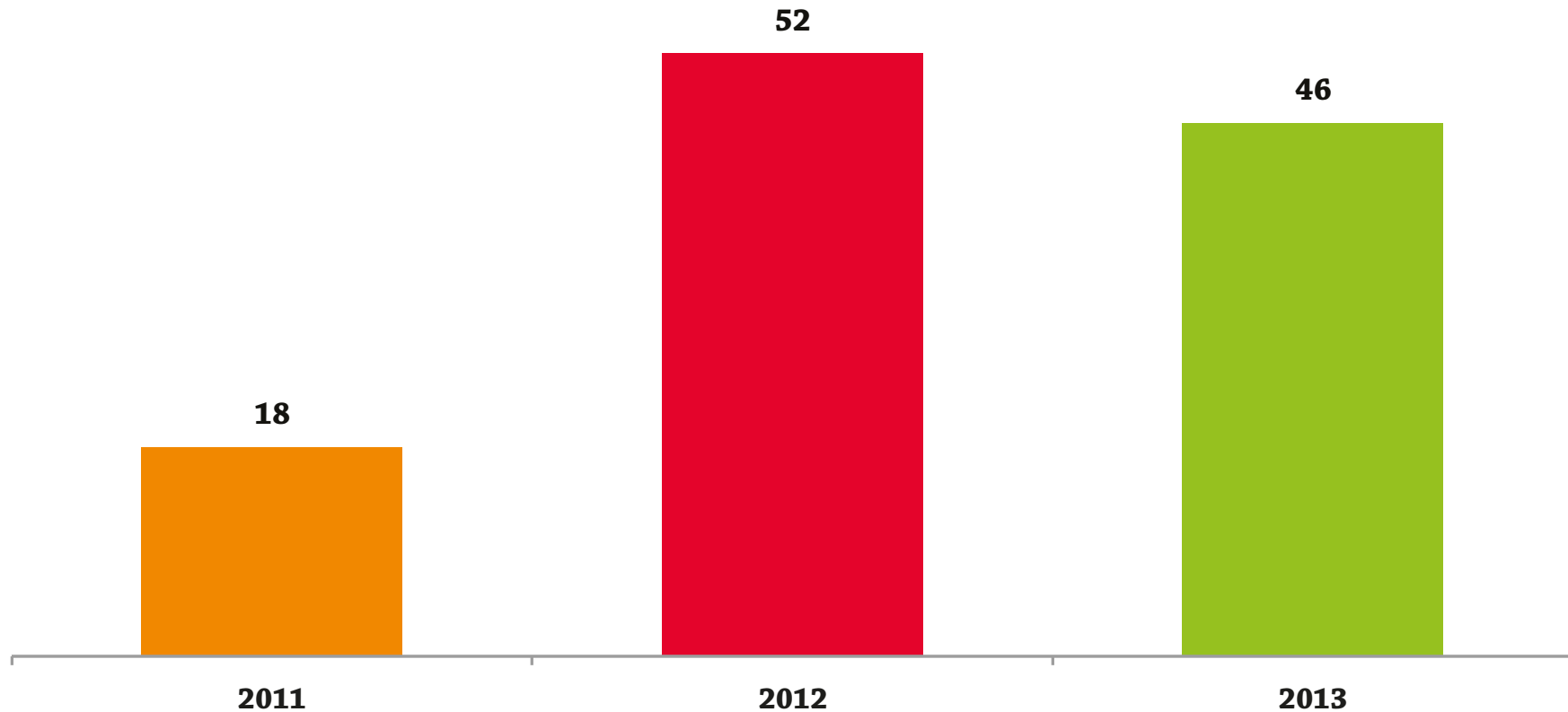
Base: Among All (don't know filtered)



News
consumption
is falling and
newspaper
readership is
hardest hit

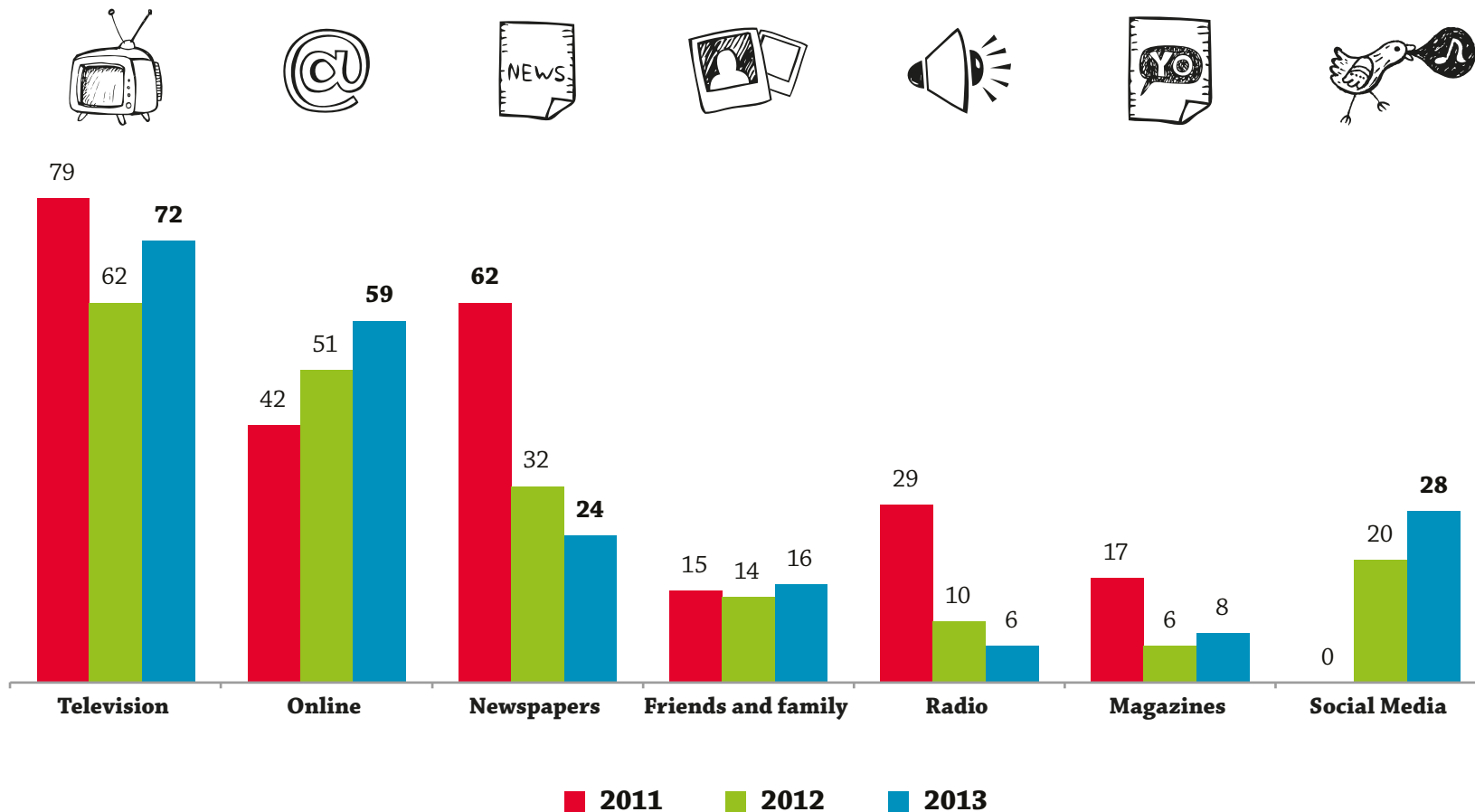
NEWS CONSUMPTION

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



NEWS CONSUMPTION

Q: Where do you get your news (%)



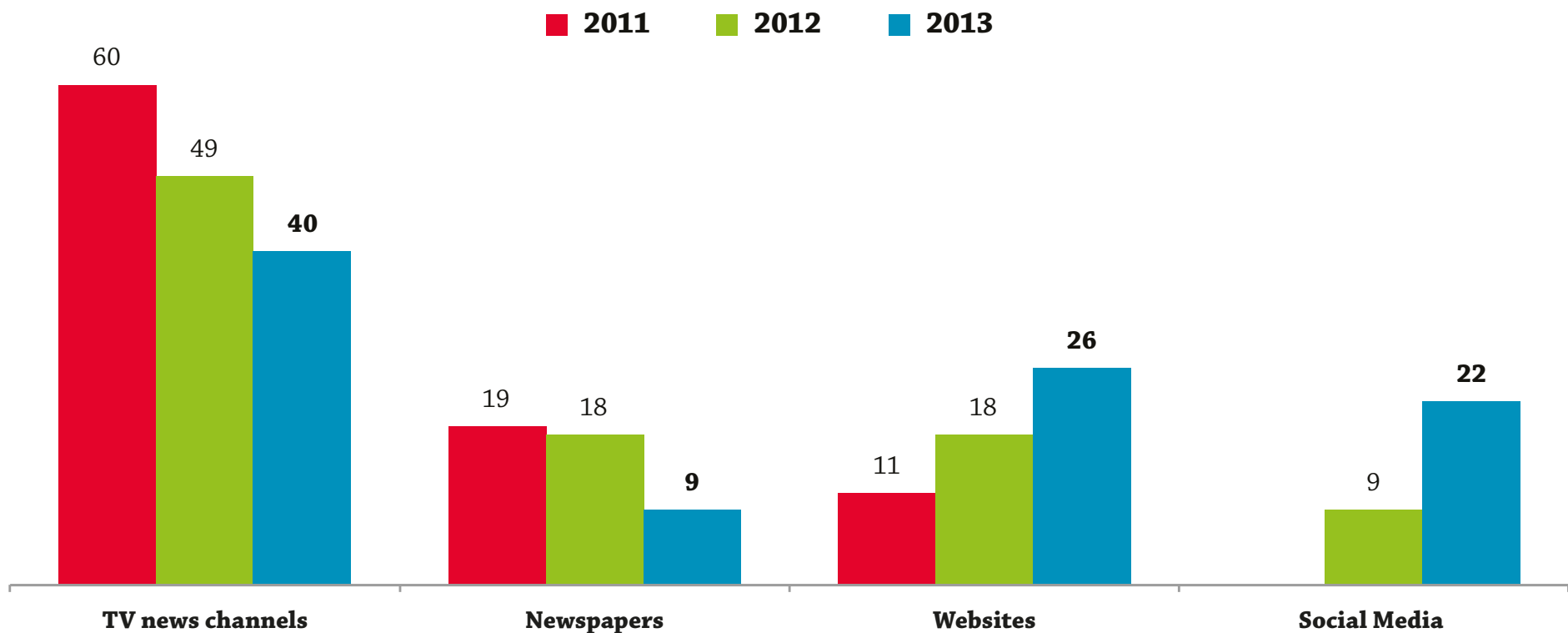
Base: Among All

T

Social media
is becoming
increasingly
influential

TRUSTED NEWS SOURCES

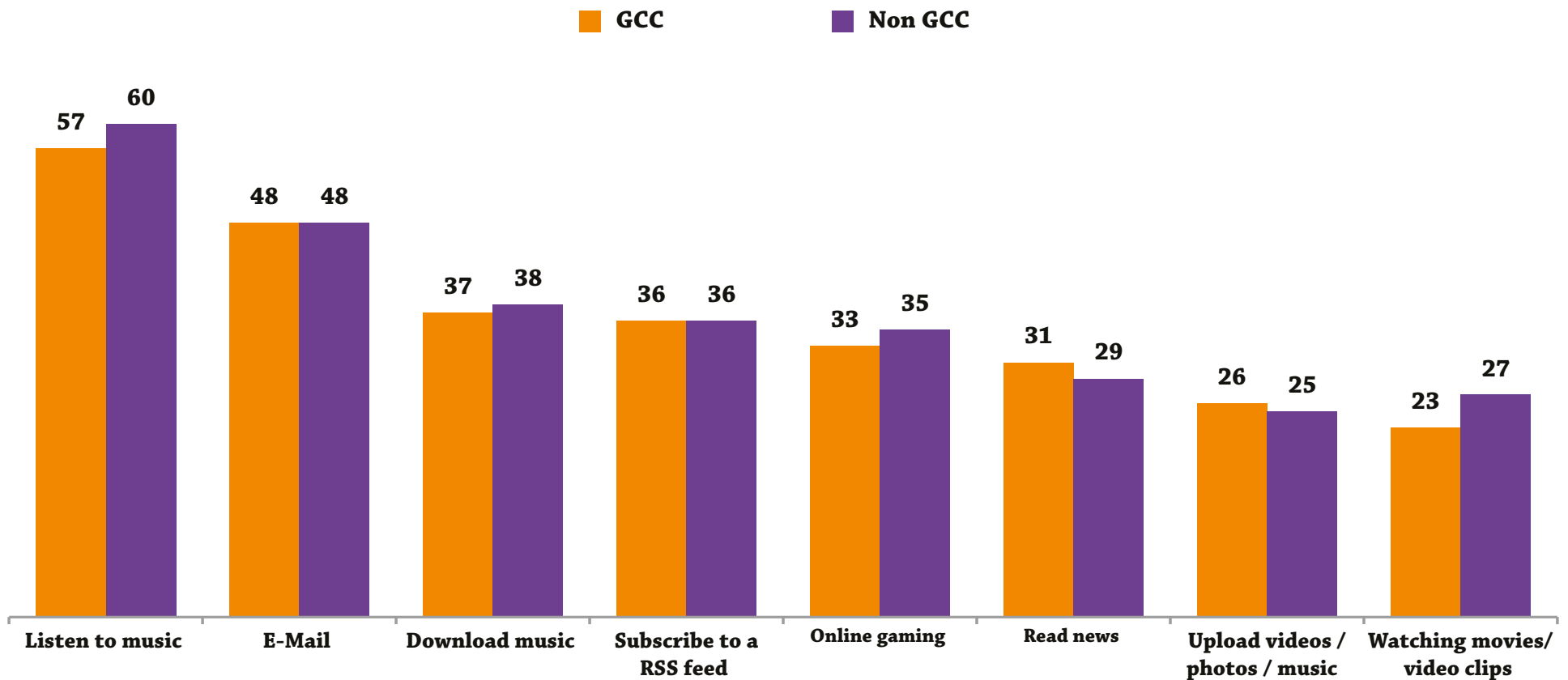
Q: In your opinion what is the most trusted source of news? (%)



Base: Among All

INTERNET USAGE

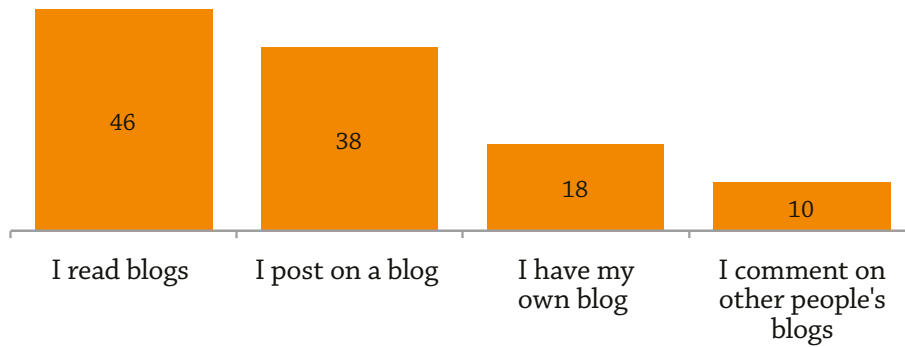
Q: What do you do when you are online? (% Top 8)



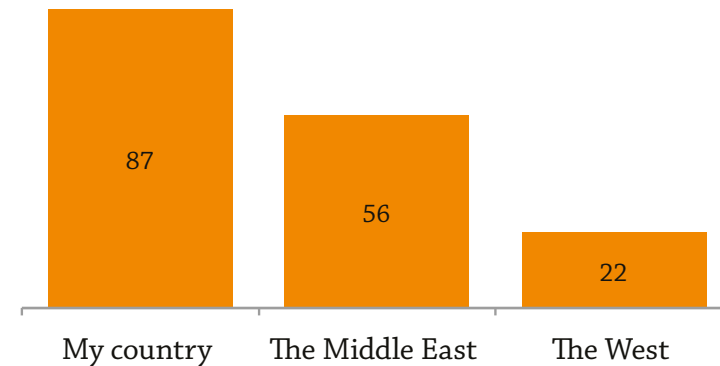
Base: Among All

BLOGS

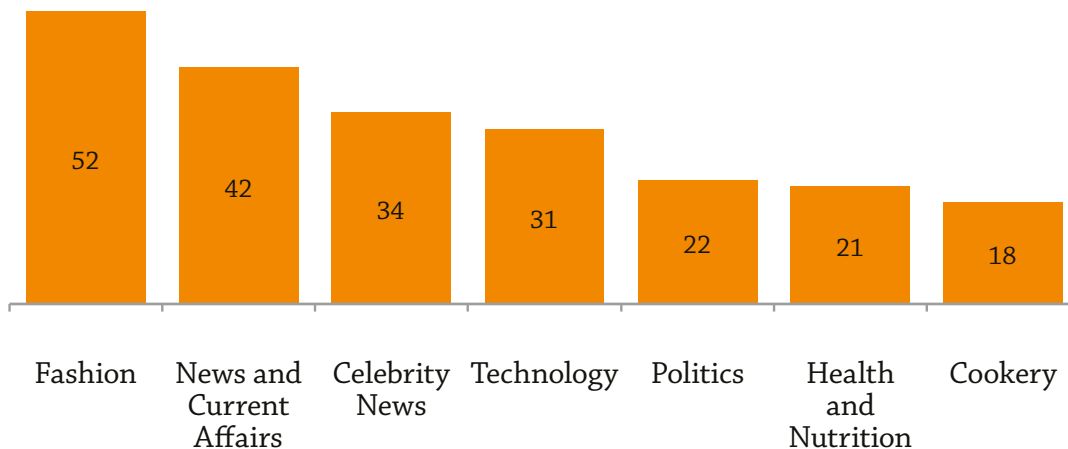
Q: What do you do on blogs? (% Top 8)



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

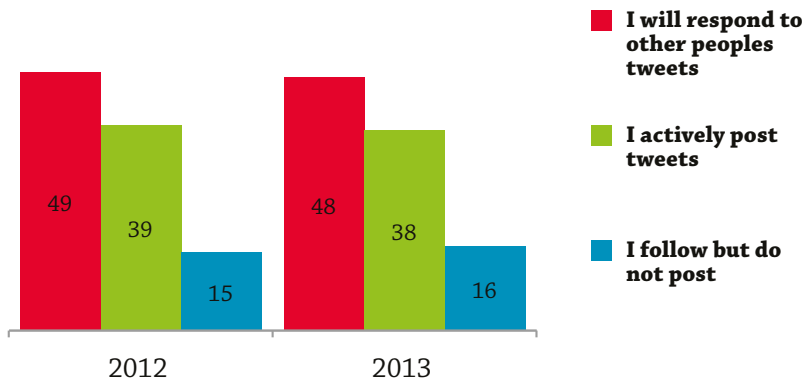


Q: What kind of blogs do you read? (%)

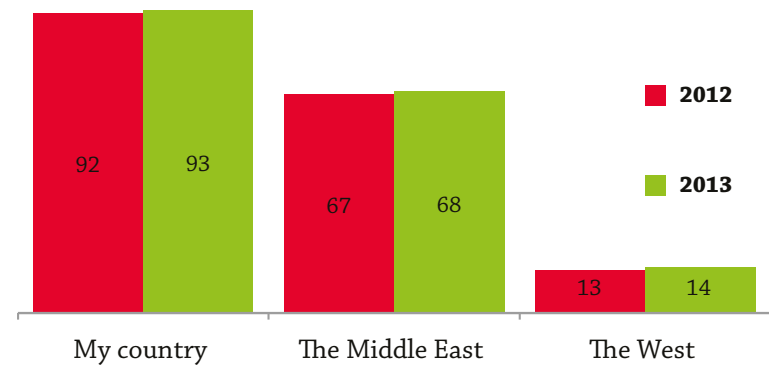


Base: All who blog

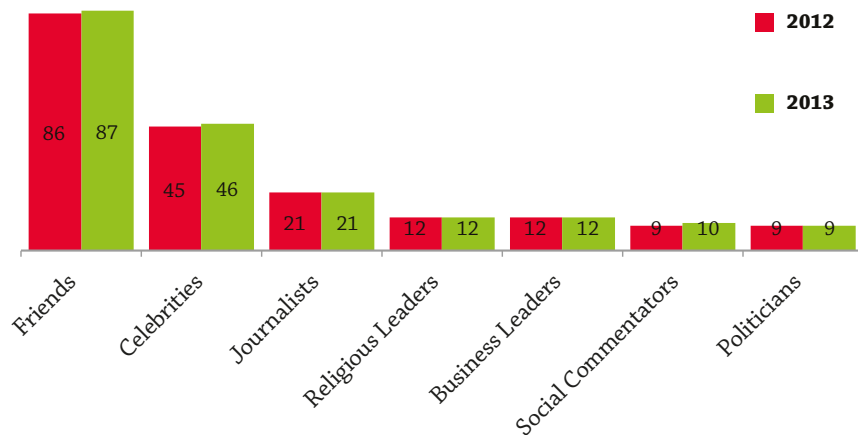
Q: Thinking about Twitter, which of the following applies to you? (%)



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



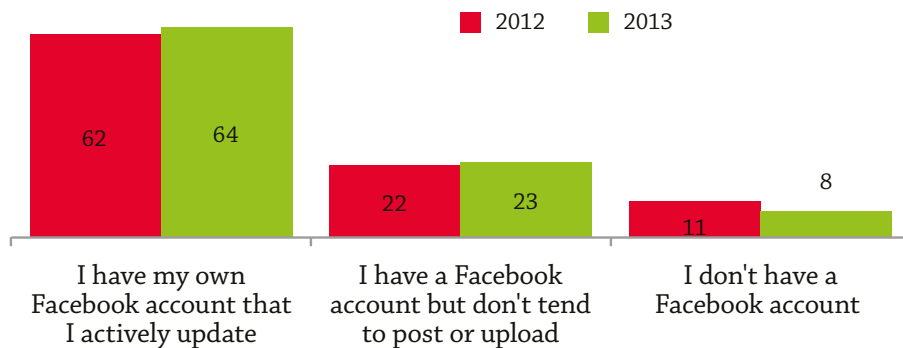
Q: Who are the types of people that you tend to follow? (%)



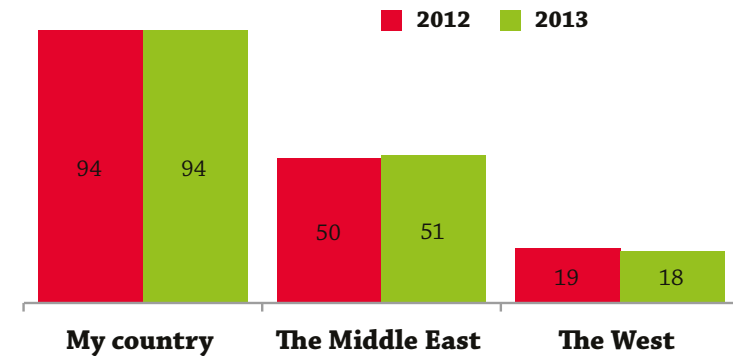
Base: All who use Twitter

FACEBOOK

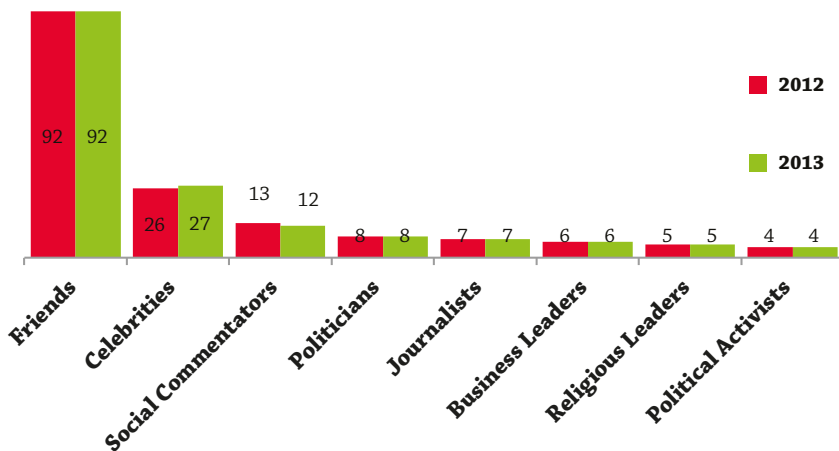
Q: Thinking about social networking, which of the following applies to you? (%)



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

1

Majority of Arab youth believe that “our best days are ahead of us”.

2

Arab youth have more national pride since the Arab Spring.

3

Fair pay remains the top priority of Arab youth.

4

Home ownership is increasingly important.

5

Rising living costs continue to be the top concern among Middle East youth.

6

Civil unrest and lack of democracy are the biggest barriers facing the region.

7

The UAE continues to be seen as a model nation.

8

Among nations outside MENA, France viewed most favourably by Arab youth.

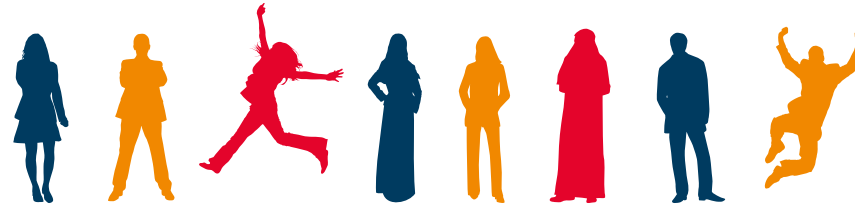
9

News consumption is falling and newspaper readership is hardest hit.

10

Social media is becoming increasingly influential.

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Algeria Bahrain Egypt Iraq Jordan Kuwait Lebanon Libya Morocco Oman Qatar Saudi Arabia Tunisia UAE Yemen