

ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2014

Algeria
Bahrain
Egypt
Iraq
Jordan
Kuwait
Lebanon
Libya

Morocco
Oman
Palestine
Qatar
Saudi Arabia
Tunisia
UAE
Yemen

“WE WANT
TO EMBRACE
MODERN VALUES.”

April 7, 2014
arabyouthsurvey.com
[#arabyouthsurvey](https://twitter.com/arabyouthsurvey)

ABOUT THE 2014 SURVEY

- 3,500 face-to-face interviews conducted by PSB
- Arab youth in the age group of 18-24 years
- Sample split 50:50 male/female
- 16 countries
 - GCC: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and UAE
 - Levant: Jordan, Iraq, Lebanon and Palestine
 - North Africa: Algeria, Egypt, Libya, Morocco and Tunisia
 - Other: Yemen

**THE RESEARCH WAS DESIGNED TO
SEEK OPINION FROM ARAB YOUTH ON
THE FOLLOWING SUBJECTS:**

GENERAL ATTITUDES

CURRENT EVENTS

ECONOMY AND PERSONAL FINANCE

EDUCATION AND CAREERS

VALUES AND BELIEFS

FOREIGN RELATIONS

MEDIA CONSUMPTION HABITS

METHODOLOGY

THE STUDY WAS COMMISSIONED IN DECEMBER 2013. THE INTERVIEWS TOOK PLACE FROM DECEMBER 2013 TO JANUARY 2014. SAMPLE DETAILS ARE GIVEN BELOW:

Original 2008-10 countries

UAE N=300	Oman N=200	Qatar N=200	Bahrain N=200	KSA N=300	Kuwait N=200	Egypt N=300	Jordan N=200	Lebanon N=200
Abu Dhabi 40%	Muscat 50%	Doha 55%	Manama 100%	Riyadh 40%	Kuwait City 20%	Cairo 50%	Amman 50%	Beirut 60%
Dubai 40%	Batinah 50%	Al Rayyan 45%		Jeddah 40%	Al Hawalli 30th	Alexandria 25%	Irbid 25%	Saida 20%
Sharjah 20%				Dammam 20%	Al Ahmadi 20%	Mansoura 25%	Zarqa 25%	Tripoli 20%
					Farwaniya 30%			

New in 2011

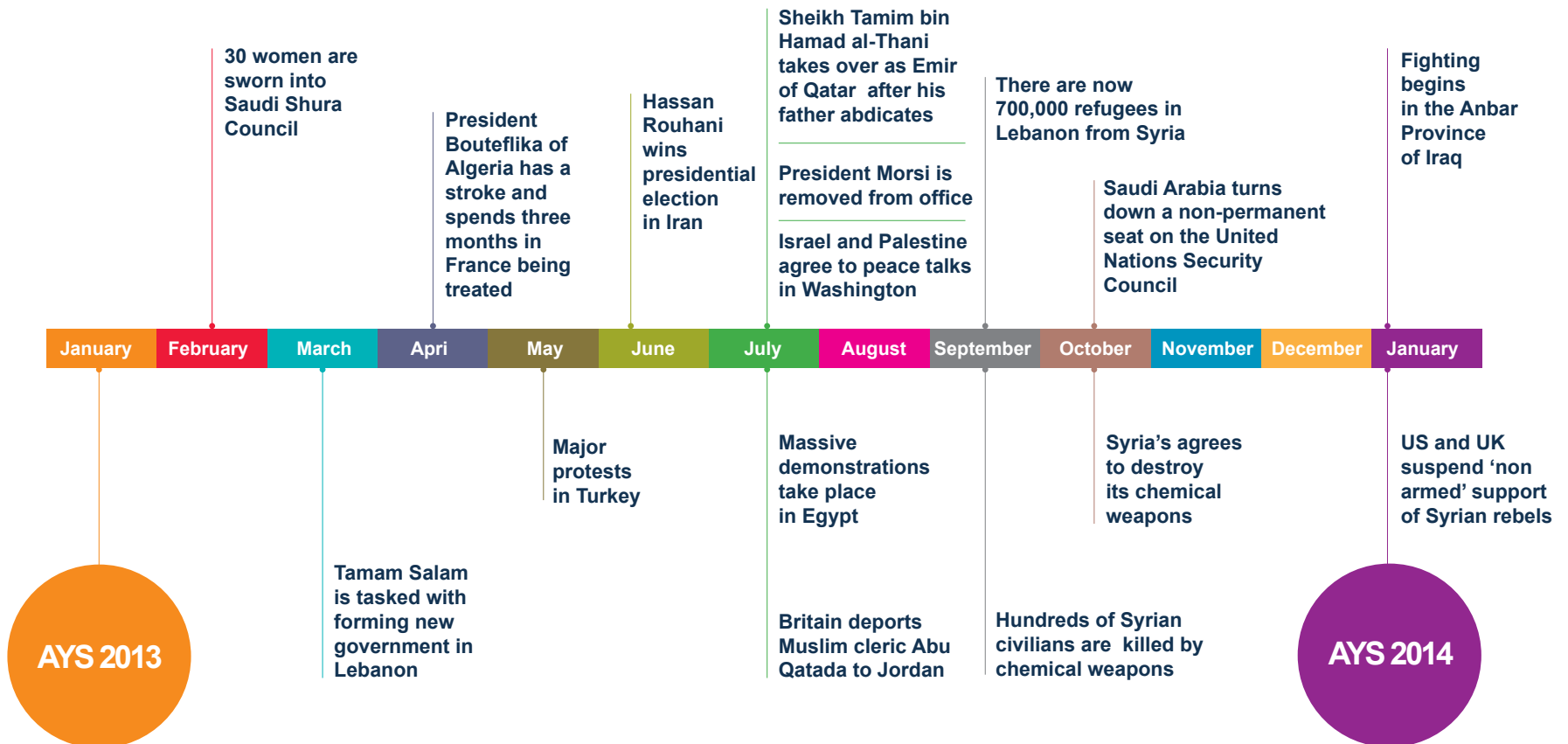
New in 2012

New in 2013

New in 2014

Iraq N=250	Tunisia N=200	Libya N=200	Algeria N=200	Morocco N=200	Yemen N=200	Palestine N=150
Baghdad (50%)	Tunis (50%)	Tripoli (50%)	Algiers (50%)	Casablanca (25%)	Sanaa (50%)	West Bank (50%)
Irbil (25%)	Sfax (25%)	Benghazi (25%)	Oran (25%)	Fes (25%)	Al Hudaydah (25%)	Gaza (50%)
Basrah (25%)	Sousse (25%)	Misrata (25%)	Constantine (25%)	Rabat (25%)	Ta'izz (25%)	
				Marrakech (25%)		

TIMELINE (JANUARY 2013 - JANUARY 2014)



TOP 10 FINDINGS

1

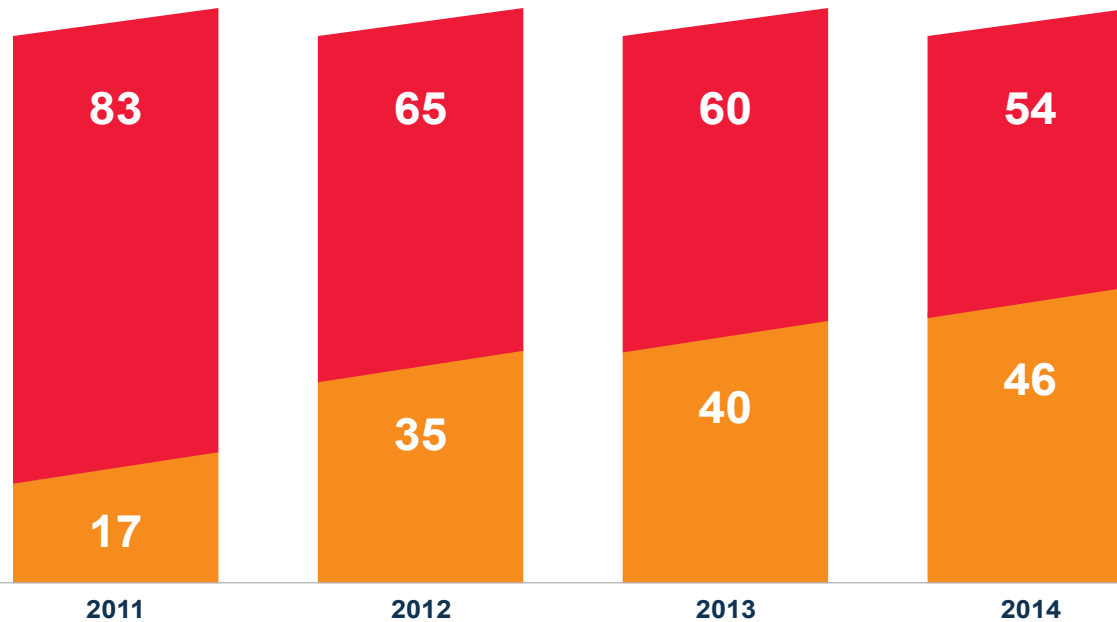
A GROWING NUMBER OF ARAB YOUTH ARE EMBRACING MODERN VALUES, WHILE FAMILY, FRIENDS AND RELIGION CONTINUE TO SHAPE THEIR OPINIONS AND INFLUENCE THEIR LIVES

VALUES AND BELIEFS

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 outdated and belong in the past. I am keen to embrace modern values and beliefs.

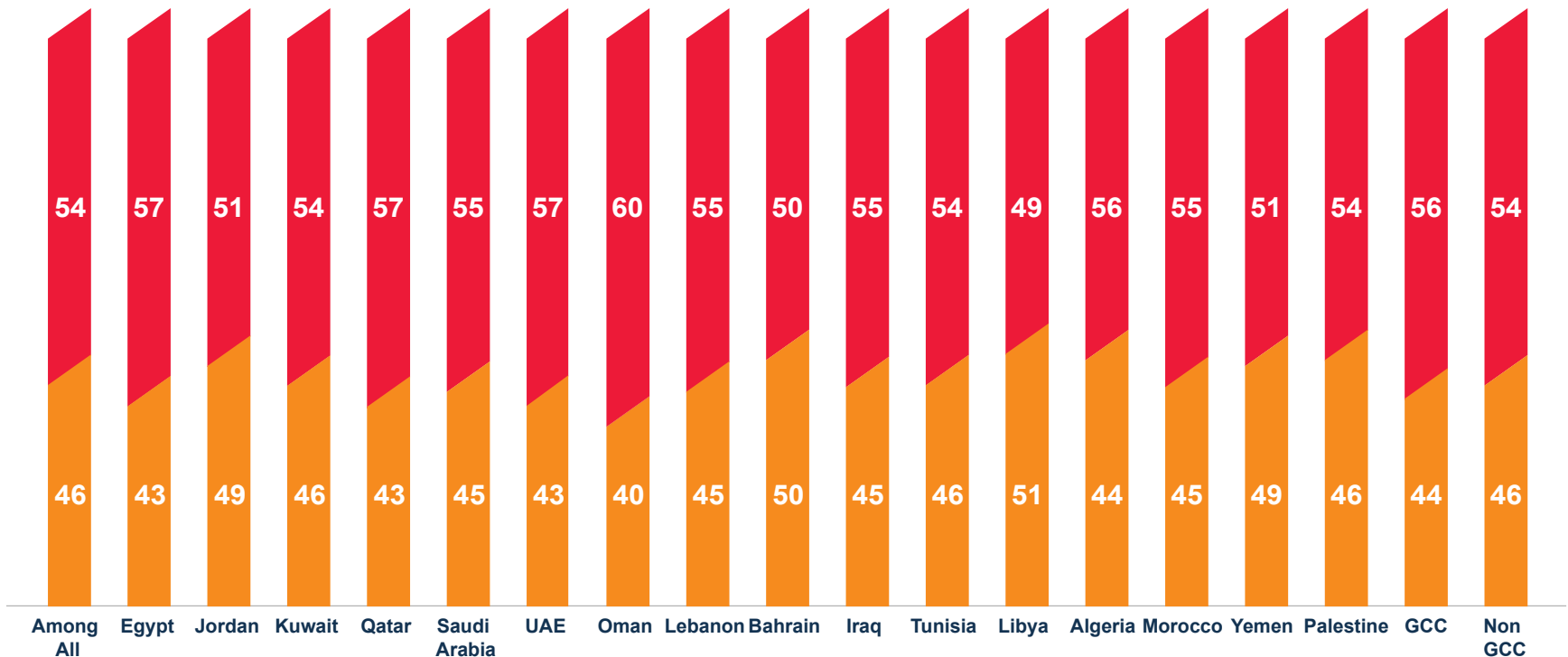


VALUES AND BELIEFS BY COUNTRY

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

Traditional values are outdated and belong in the past. I am keen to embrace modern values and beliefs.

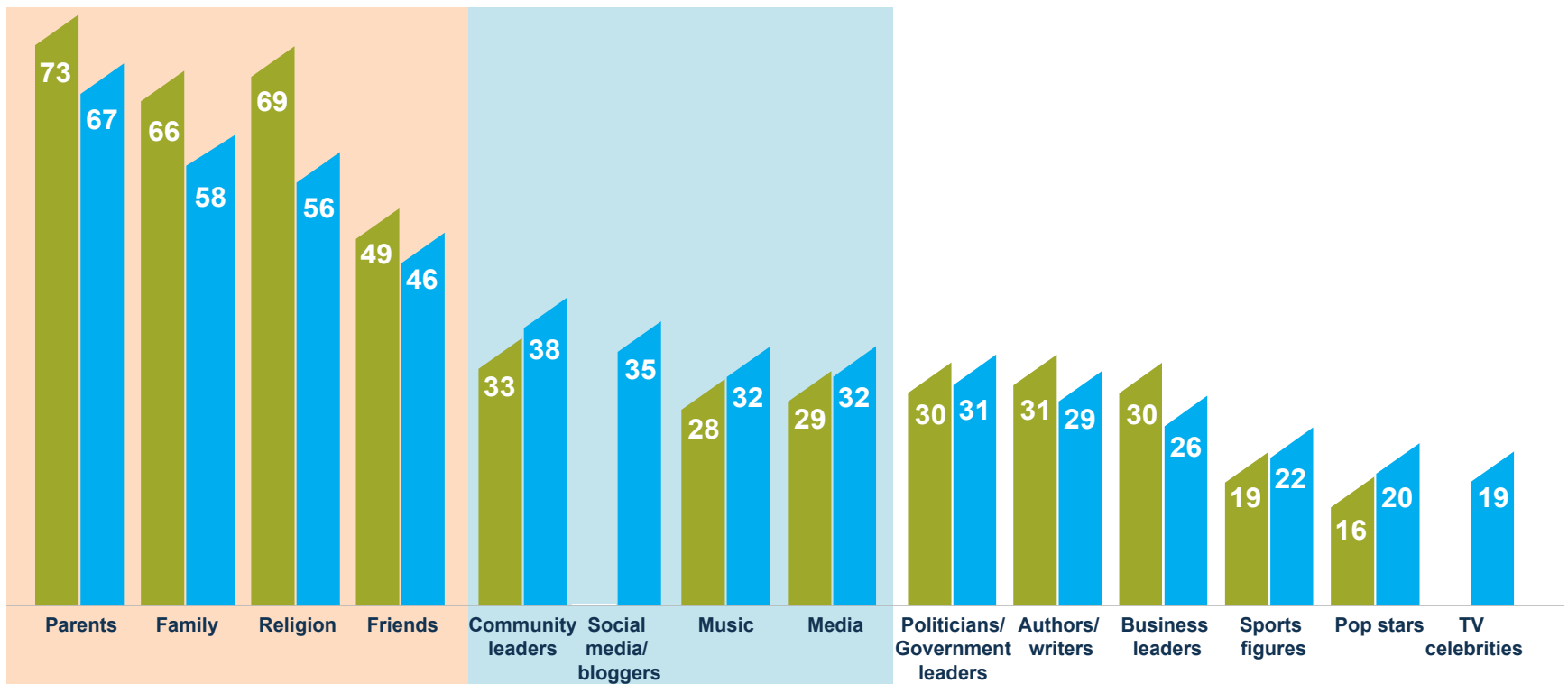
2014



LIFE INFLUENCES

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

2013 2014



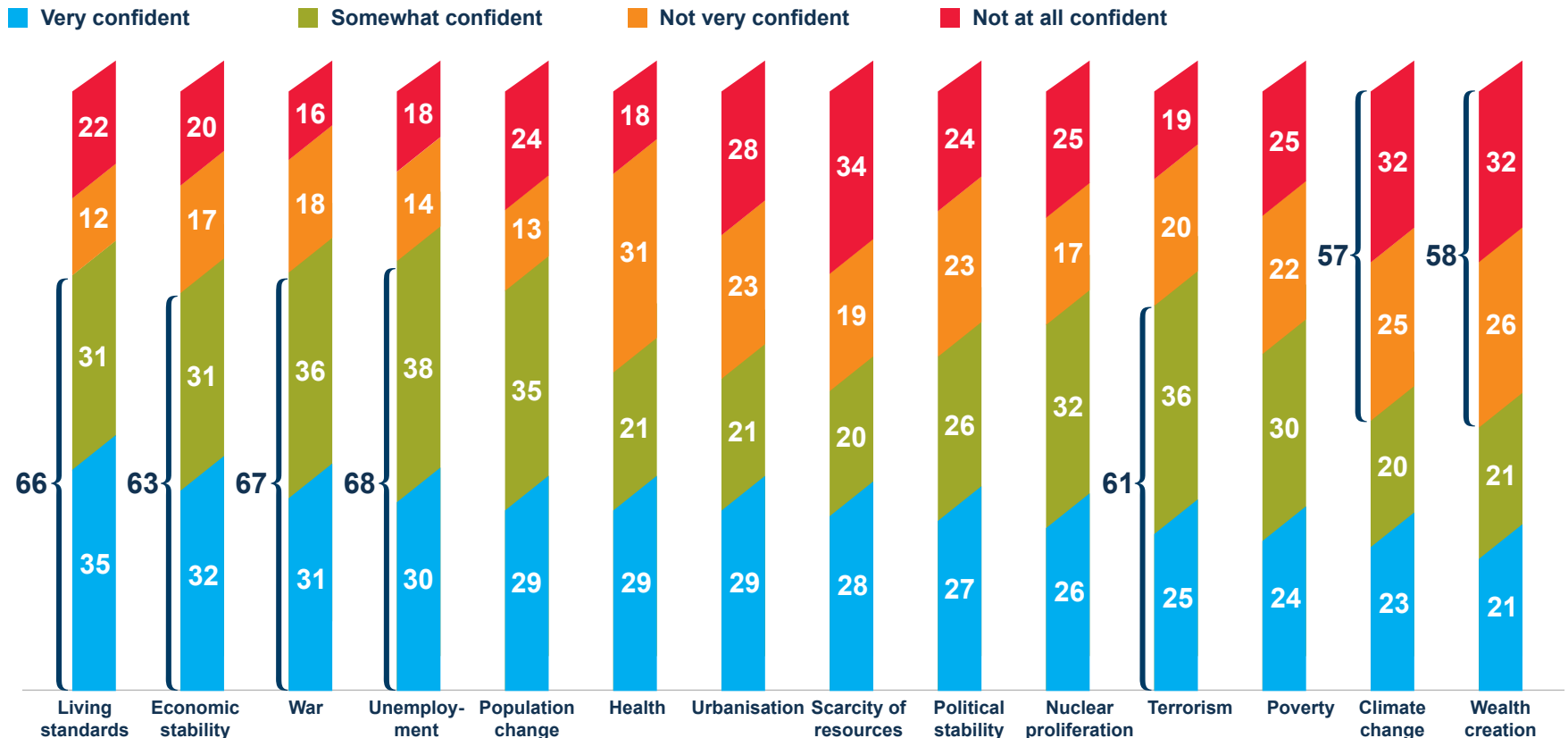
Base: Rebased to remove "Don't know"

2

YOUNGSTERS ARE CONFIDENT IN THEIR NATIONAL GOVERNMENTS' ABILITY TO DEAL WITH A WIDE RANGE OF ISSUES. CONFIDENCE IN THE LONG TERM IMPACT OF THE ARAB SPRING IS DROPPING

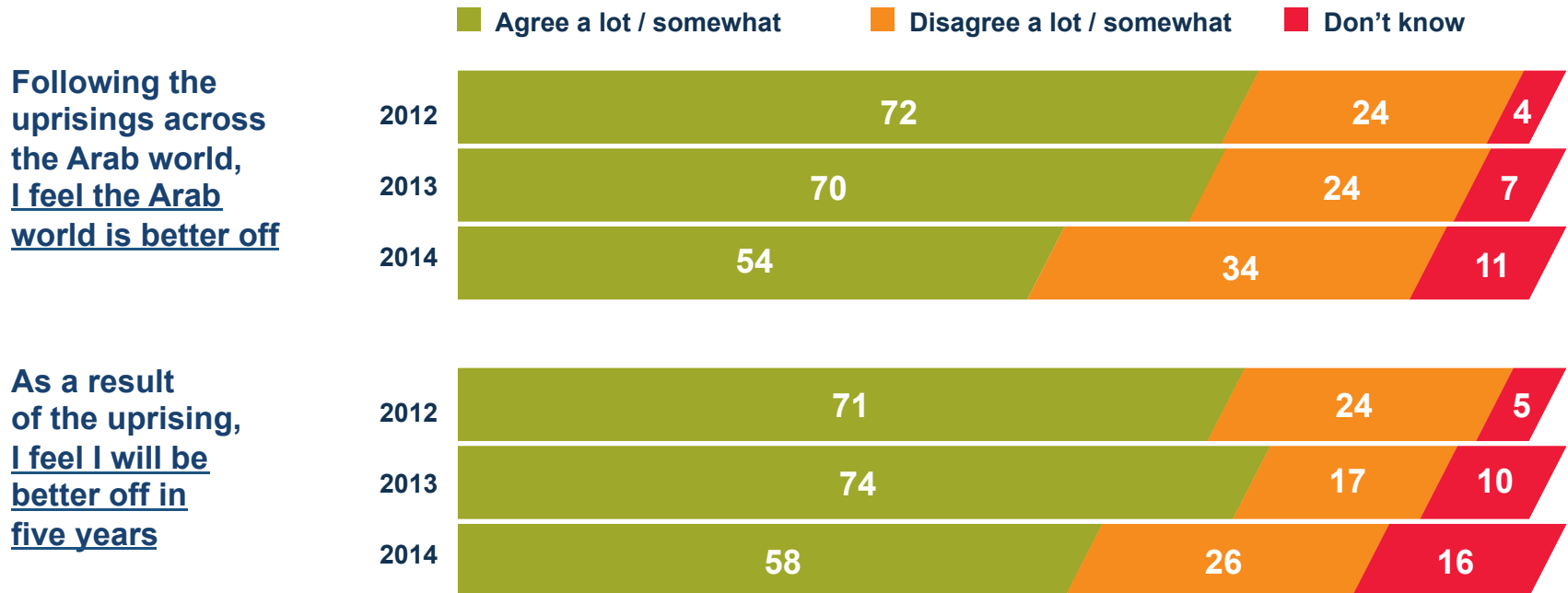
CONFIDENCE IN NATIONAL GOVERNMENTS' ABILITIES

How confident are you in your national governments' abilities to deal with the following issues?



IMPACT OF THE ARAB SPRING

How far do you agree or disagree with the following?



3

**RISING LIVING COSTS AND
UNEMPLOYMENT ARE THE BIGGEST
CONCERNS FOR YOUTH ACROSS
THE MIDDLE EAST**

CONCERN ABOUT KEY ISSUES

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

(% Very concerned) (Top 5)

2011 2012 2013 2014

Rising cost of living



Unemployment



National economy *



Opportunities for women



Threat of terrorism



* New category in 2014

Base: Rebased to remove "Don't know"

CONCERN ABOUT KEY ISSUES-GCC/NON-GCC SPLIT

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

Rising cost of living

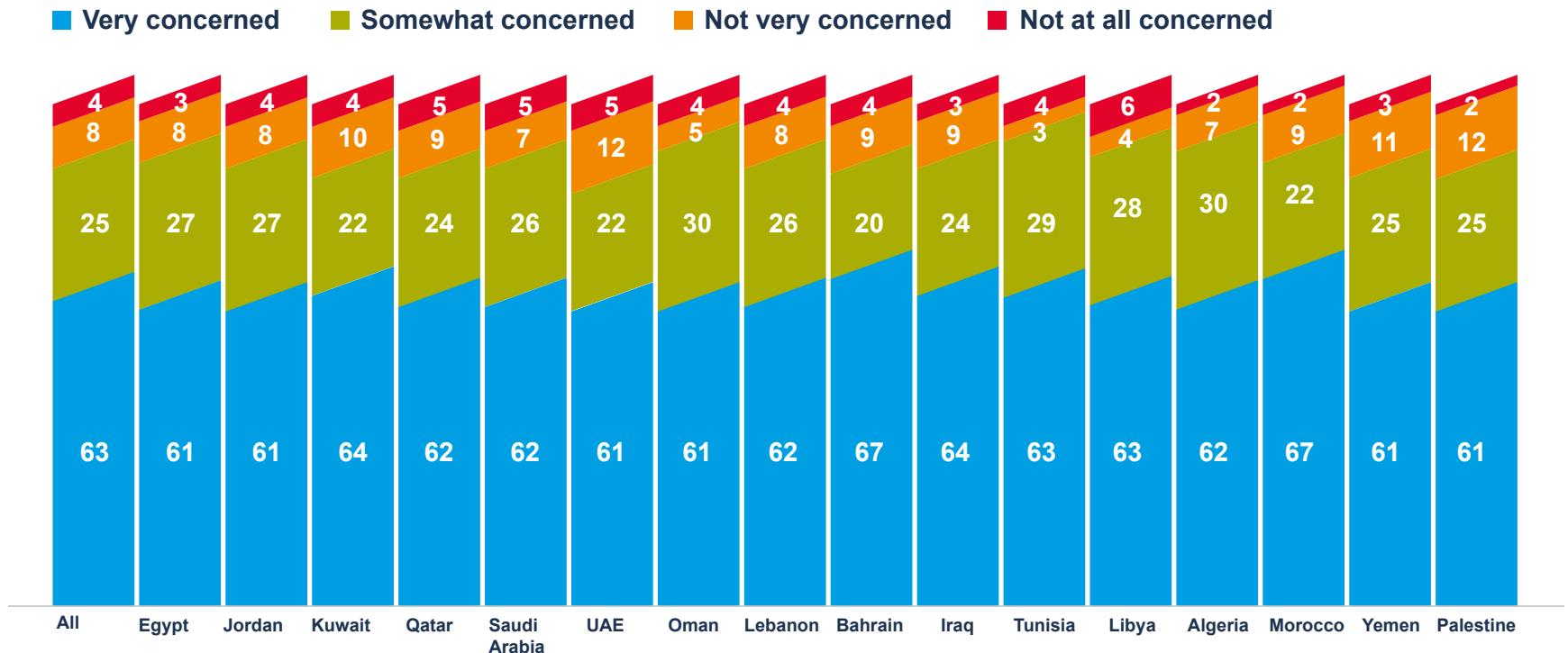


Unemployment



CONCERN ABOUT THE RISING COST OF LIVING BY COUNTRY

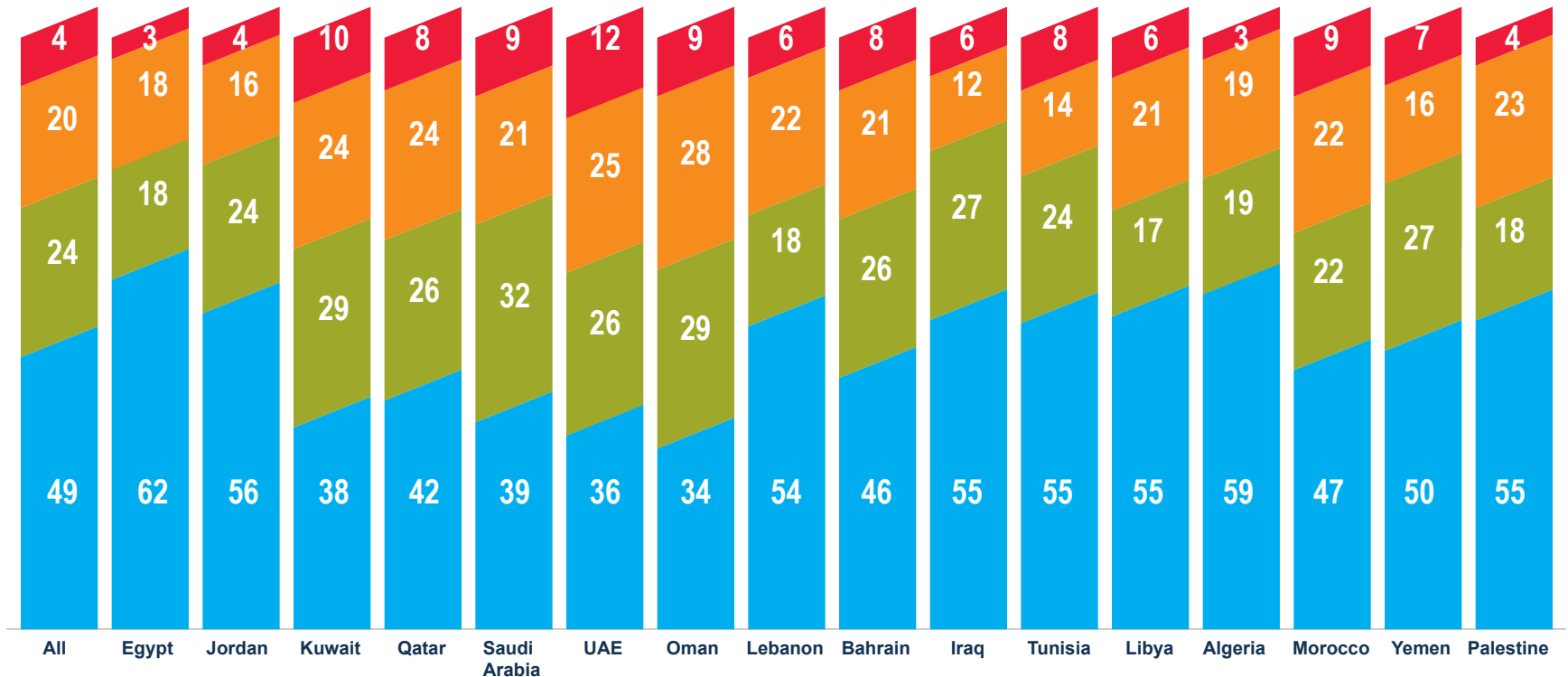
How concerned would you say you are about the rising cost of living?



CONCERN ABOUT UNEMPLOYMENT BY COUNTRY

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

■ Very concerned
 ■ Somewhat concerned
 ■ Not very concerned
 ■ Not at all concerned



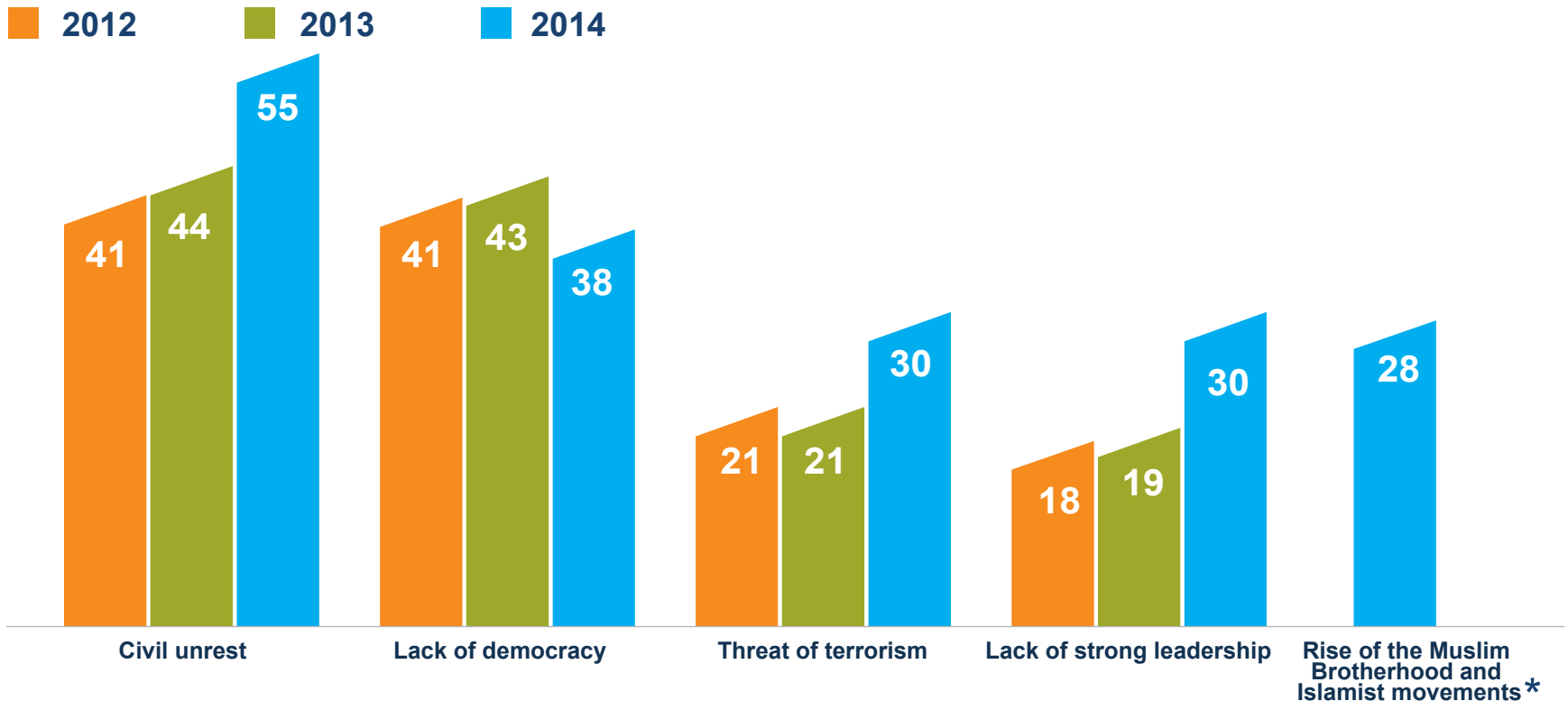
4

**ARAB YOUTH BELIEVE THAT CIVIL
UNREST IS THE BIGGEST OBSTACLE
FACING THE REGION**

BIGGEST OBSTACLES FACING THE MIDDLE EAST

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

(Top 5)



* New category in 2014

Base: Among All

TOP TWO OBSTACLES-GCC/NON-GCC SPLIT

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

(Top 2)

Civil unrest



Lack of democracy

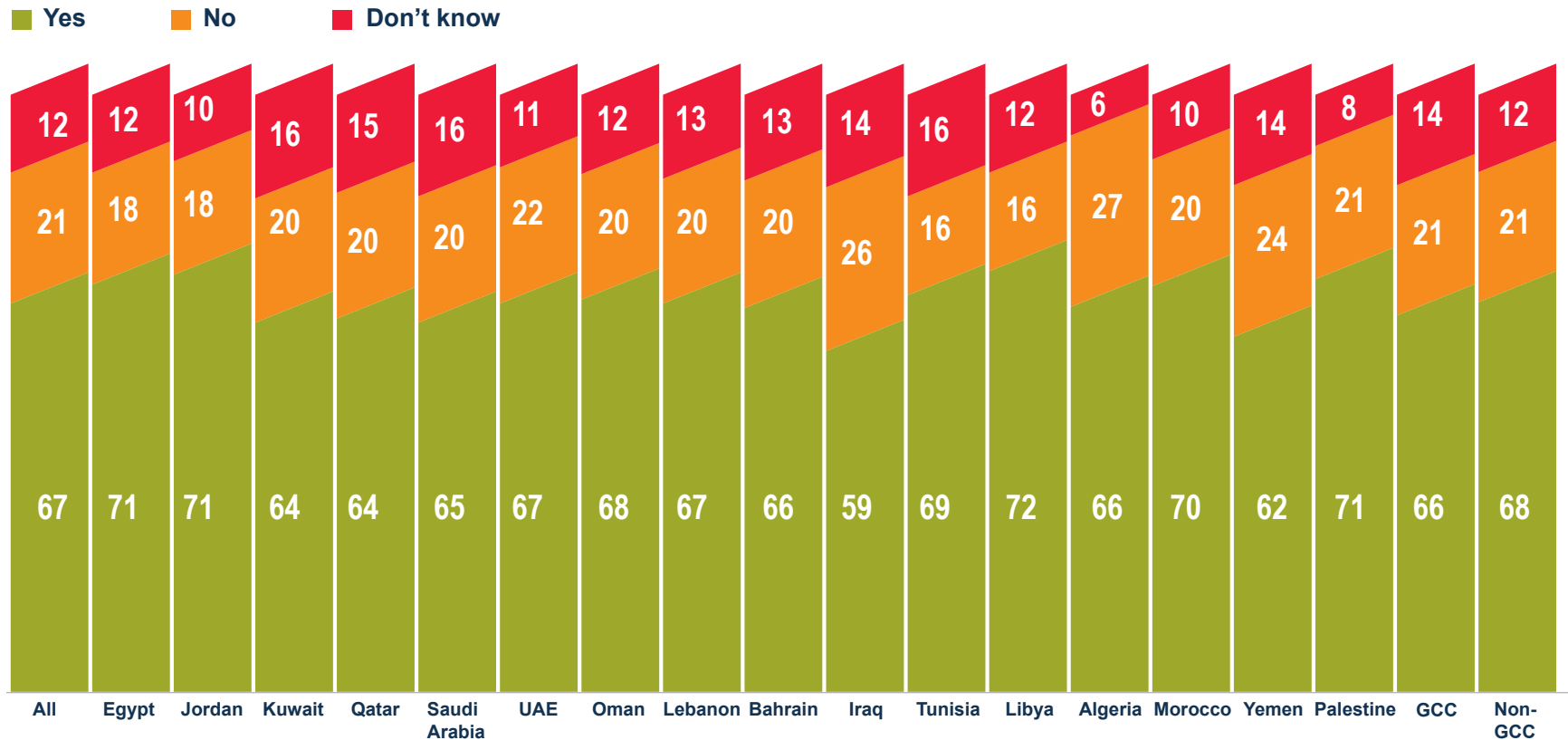


5

**ENTREPRENEURIAL SPIRIT IS HIGH
AND A GROWING NUMBER OF YOUNG
ARABS WOULD LIKE TO WORK IN
THE PRIVATE SECTOR**

ENTREPRENEURSHIP BY COUNTRY

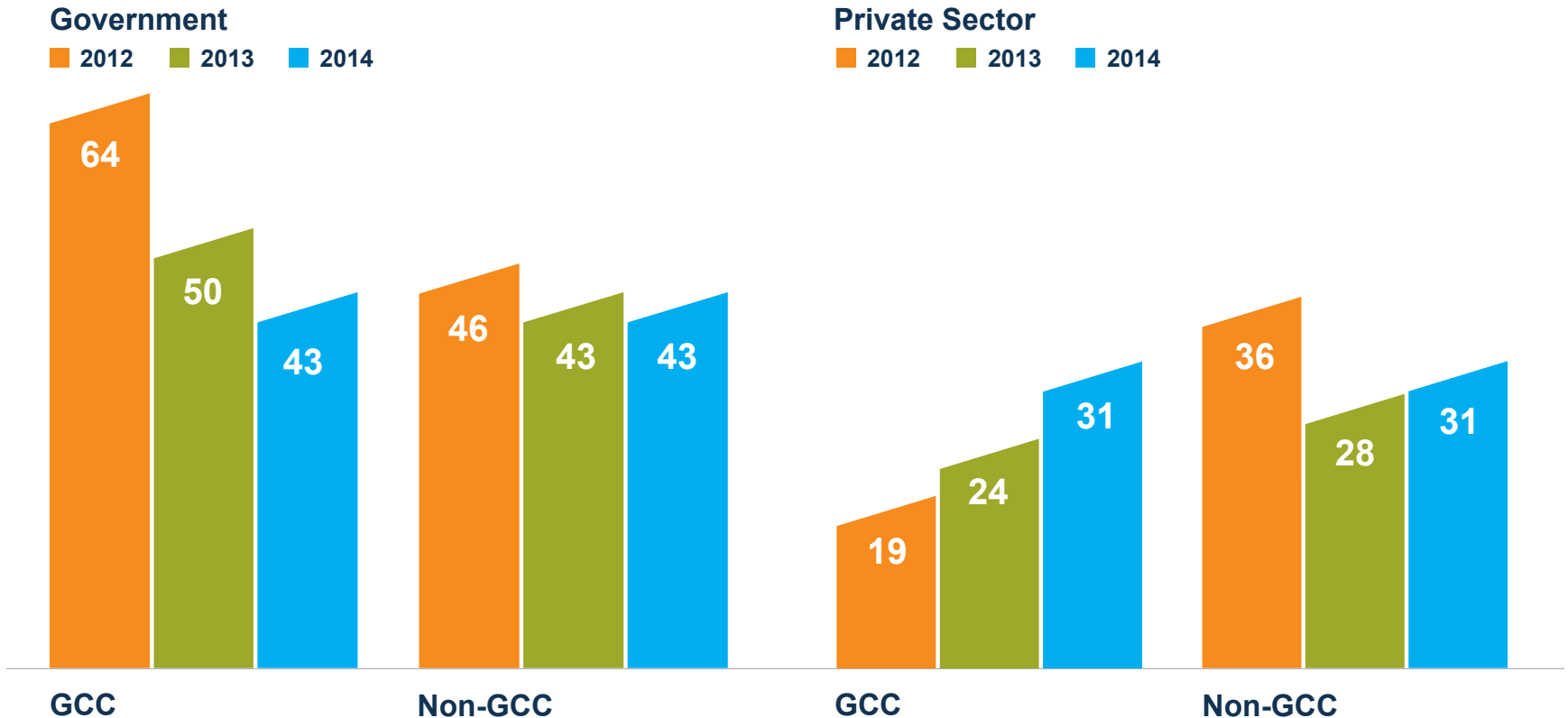
Do you feel people of this generation are more likely to start a business than in previous generations?



WORK SECTOR PREFERENCE-GCC/NON-GCC SPLIT

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

(% Private sector and % Government sector)

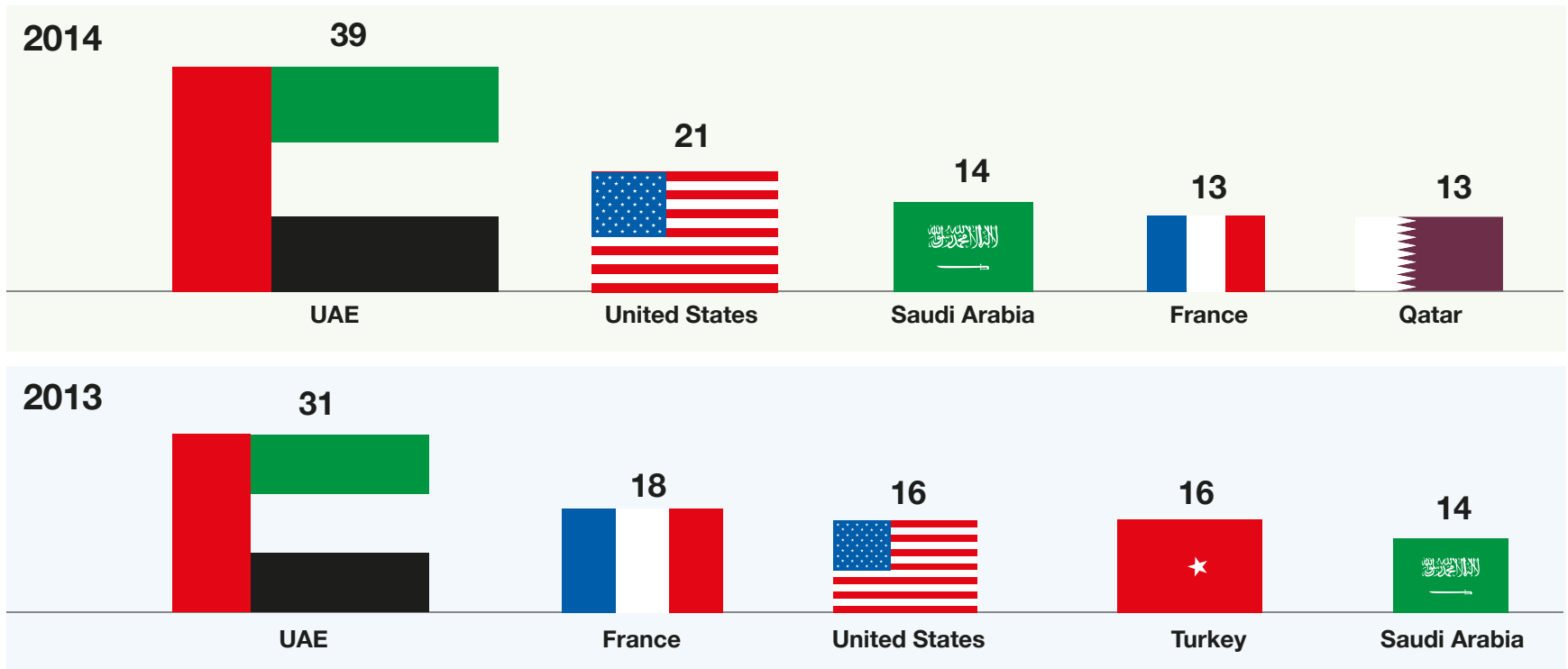


6

**THE UAE IS THE COUNTRY THAT MOST
ARAB YOUTH WOULD LIKE TO LIVE IN
AND IS SEEN AS A MODEL FOR THEIR
COUNTRY TO EMULATE**

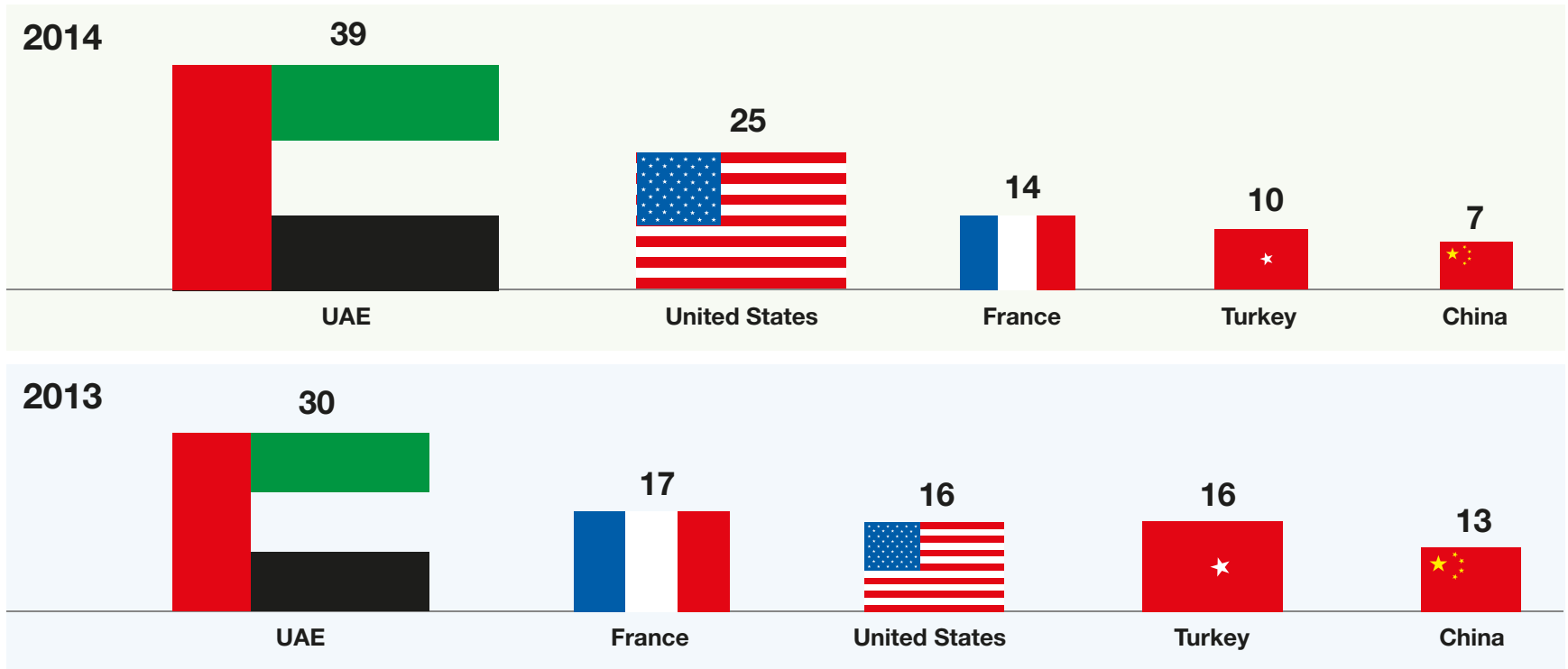
MODEL NATIONS

Which country in the world, if any, would you like to live in?



DESIRED COUNTRY TO EMULATE

Which country in the world, if any, would you most like your country to be like?

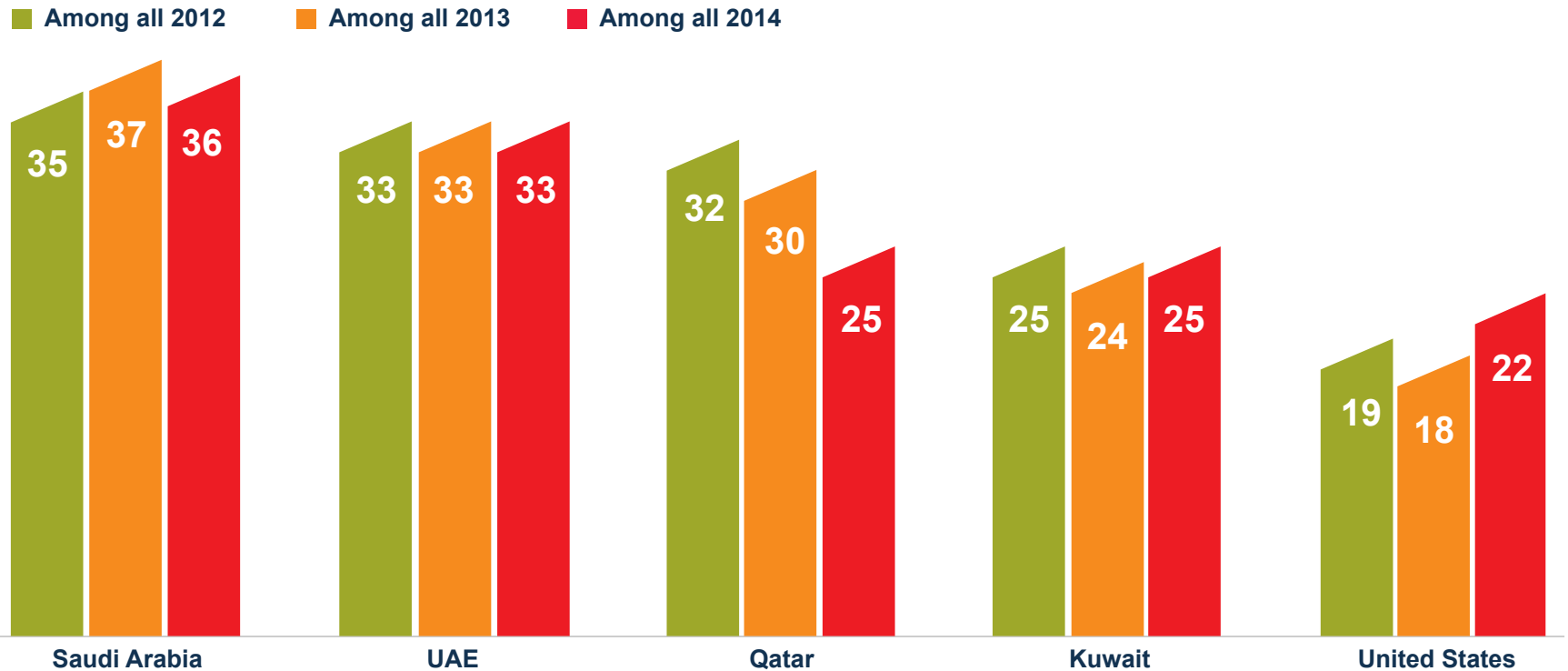


7

**ARAB YOUTH CONSIDER THEIR COUNTRY'S
BIGGEST ALLIES TO BE REGIONAL NEIGHBOURS
SUCH AS SAUDI ARABIA AND THE UAE RATHER
THAN TRADITIONAL WESTERN COUNTRIES**

COUNTRY'S BIGGEST ALLIES

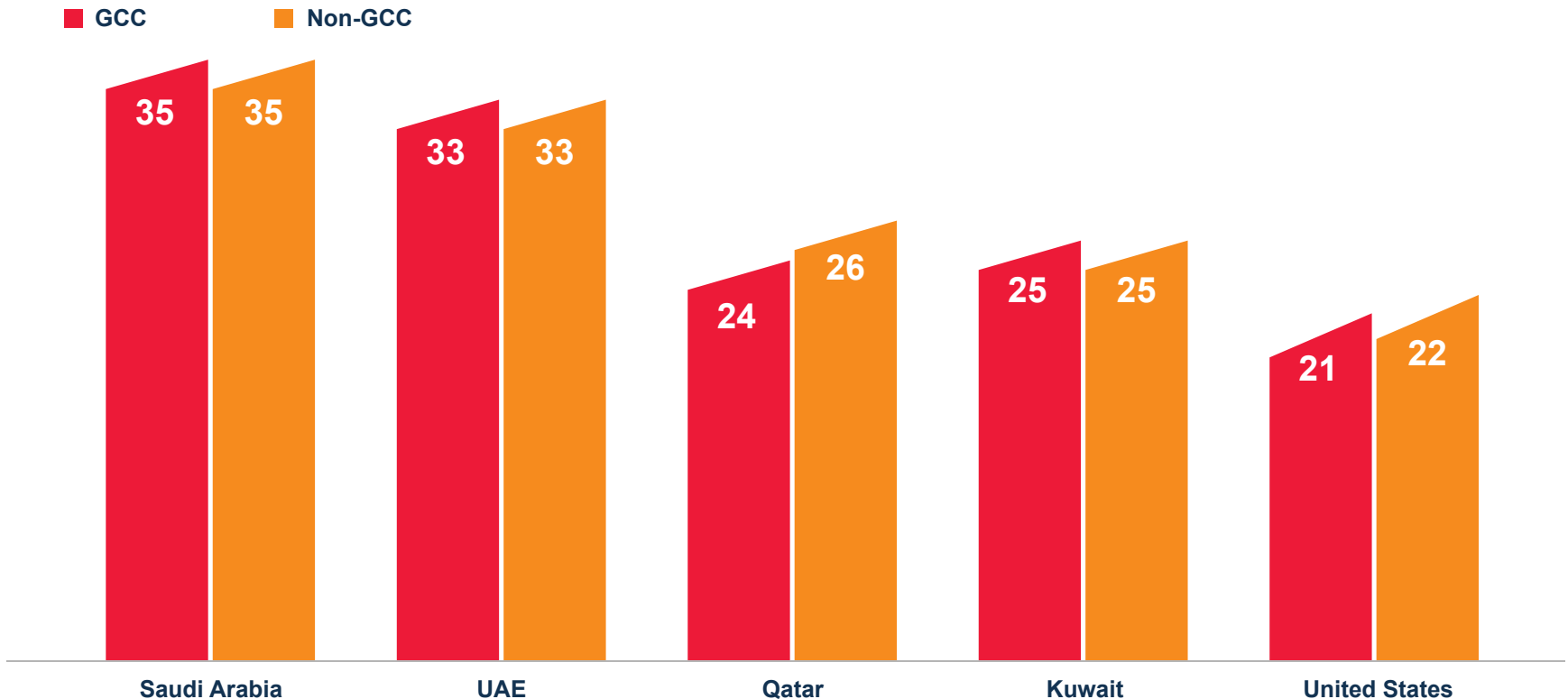
Who would you say is your country's biggest ally?



BIGGEST ALLIES-GCC/NON-GCC SPLIT

Who would you say is your country's biggest ally?

(Top 5)

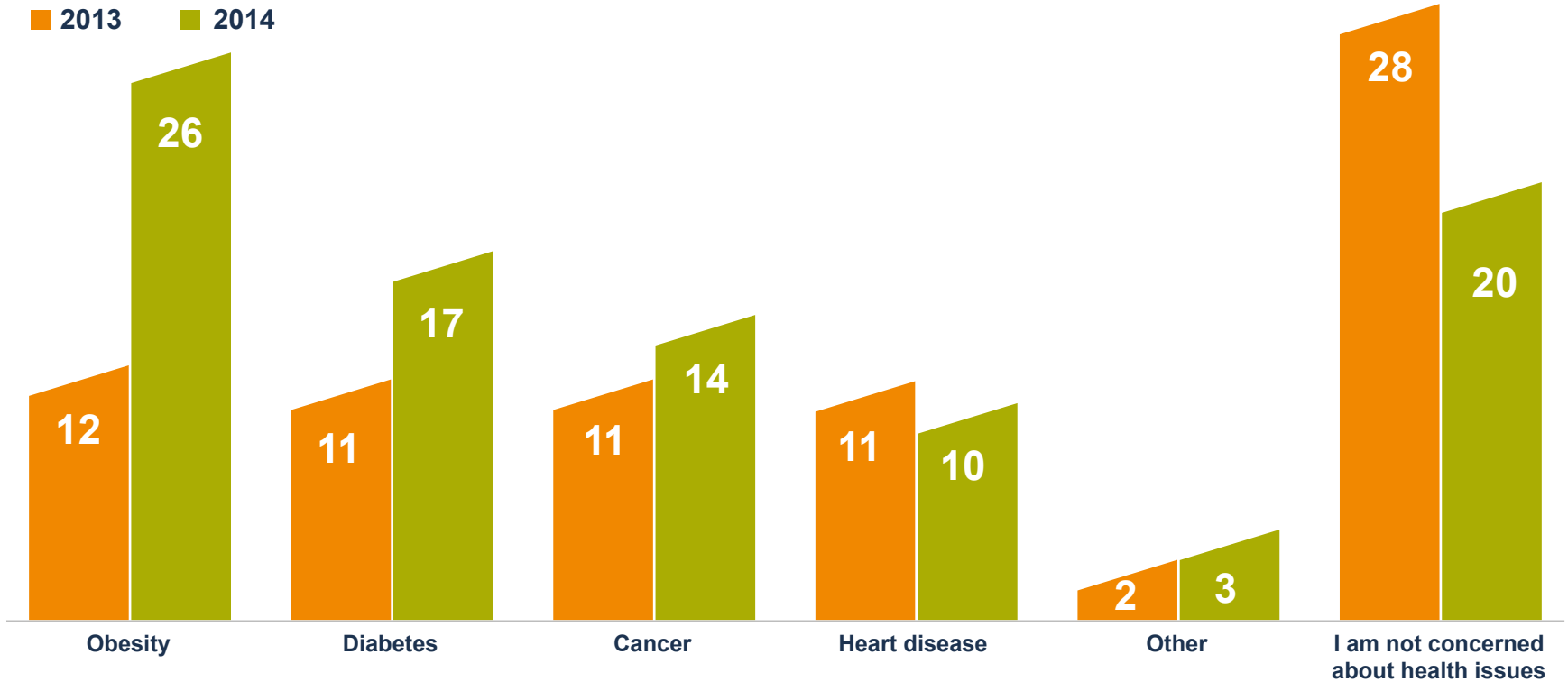


8

ARAB YOUTH ARE INCREASINGLY CONCERNED ABOUT OBESITY AND LIFESTYLE DISEASES AND DO NOT BELIEVE THAT HEALTHCARE IN THEIR COUNTRY IS IMPROVING

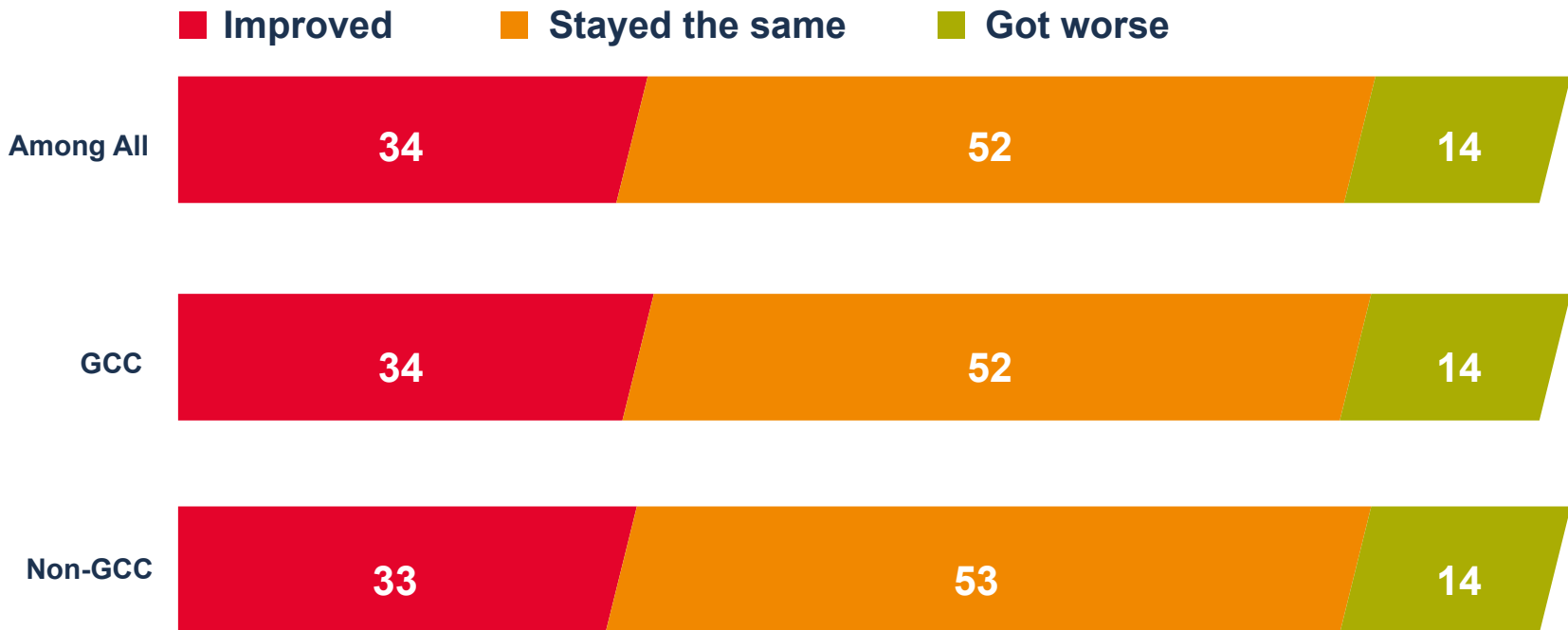
HEALTH ISSUES

Which of the following health issues concerns you most?



HEALTHCARE SERVICES-GCC/NON-GCC SPLIT

In the last year do you feel that the healthcare in your country has...?

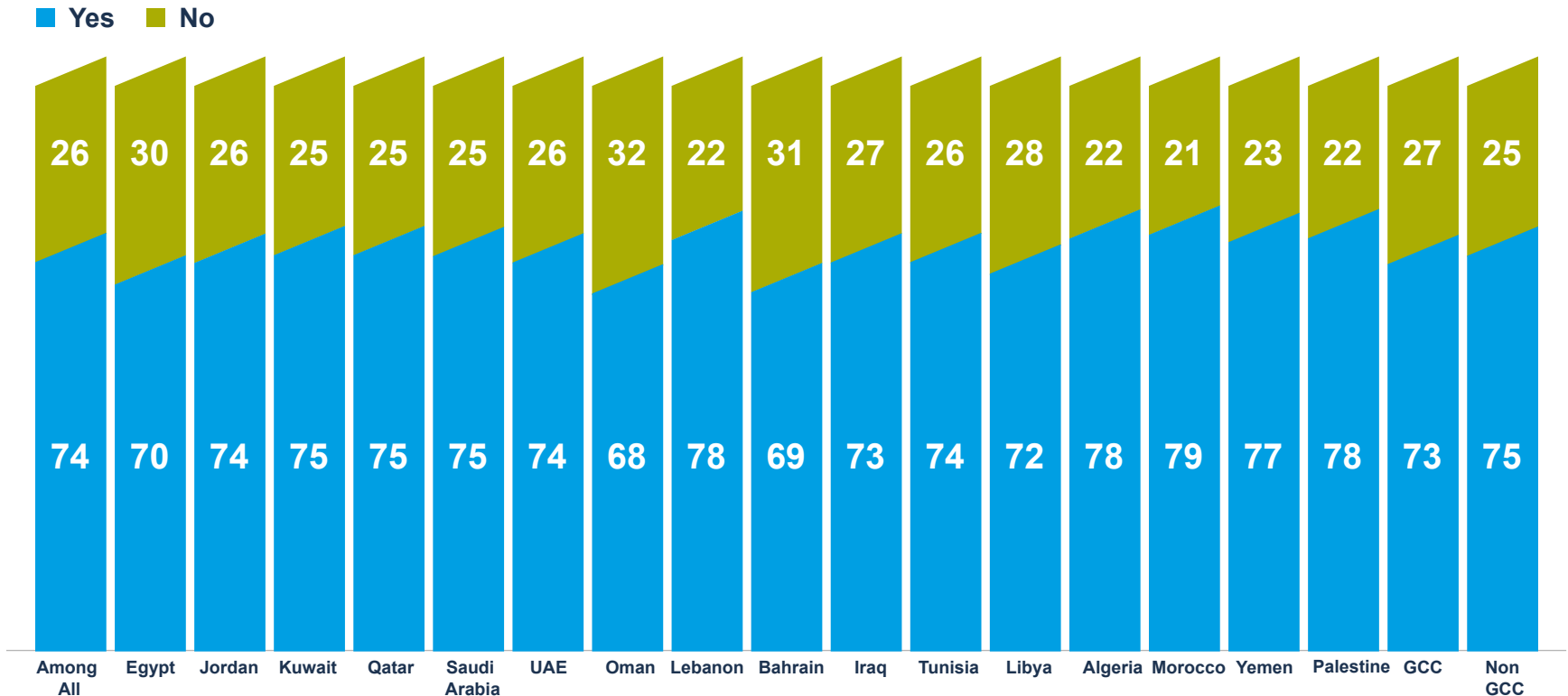


9

**AN OVERWHELMING MAJORITY
OF YOUNG ARABS BELIEVE THEY ARE
ENTITLED TO SUBSIDISED ENERGY COSTS,
WHILE CONCERN ABOUT CLIMATE CHANGE
IS LOW ACROSS THE REGION**

ENERGY SUBSIDIES BY COUNTRY

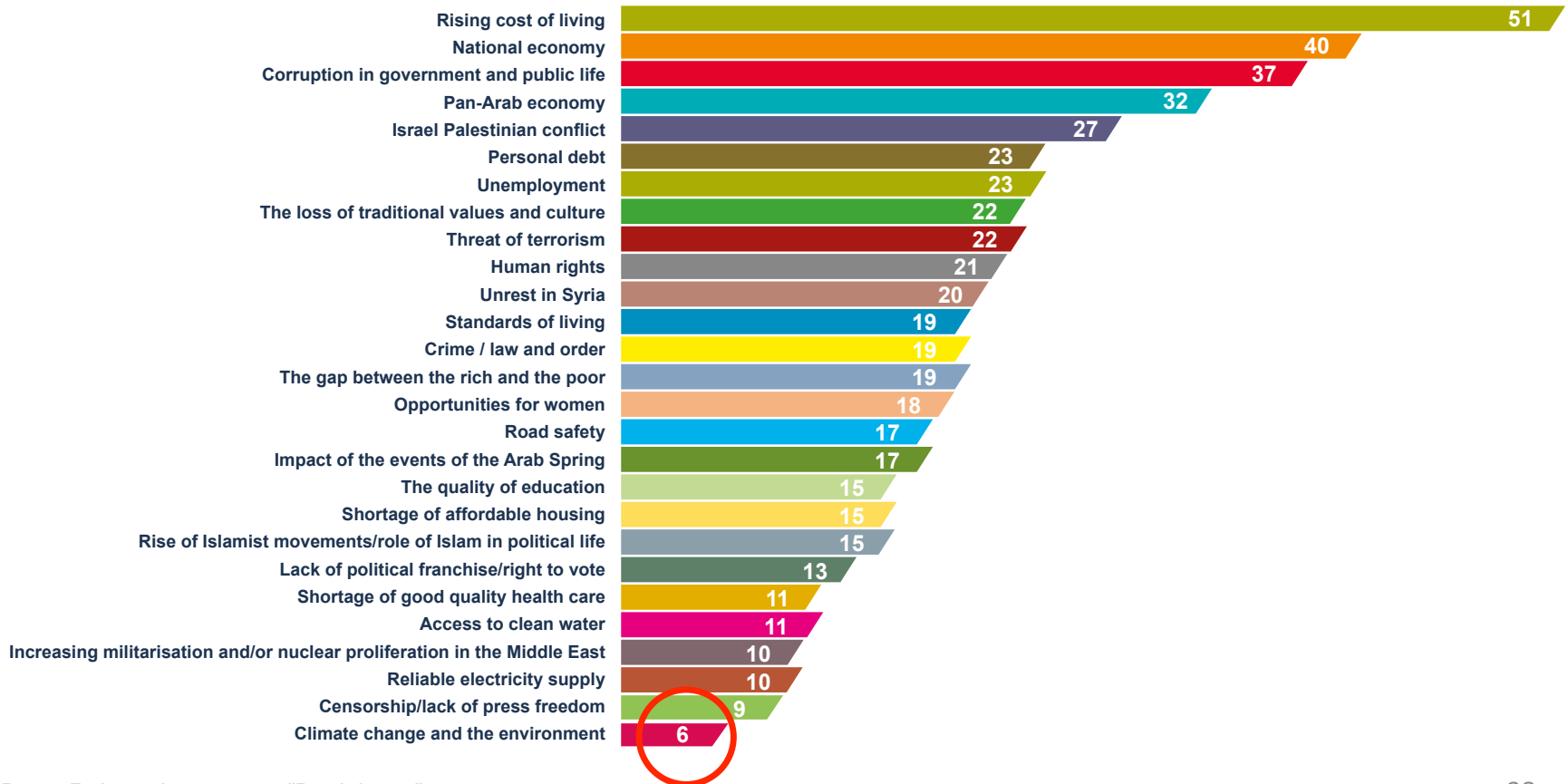
Do you think energy, electricity and transport fuel such as gasoline and diesel should be subsidised by your government?



BIGGEST CHALLENGE FACING THE MIDDLE EAST

Which of the following would you say is the biggest challenge facing the Middle East today?

2014



Base: Rebased to remove "Don't know"

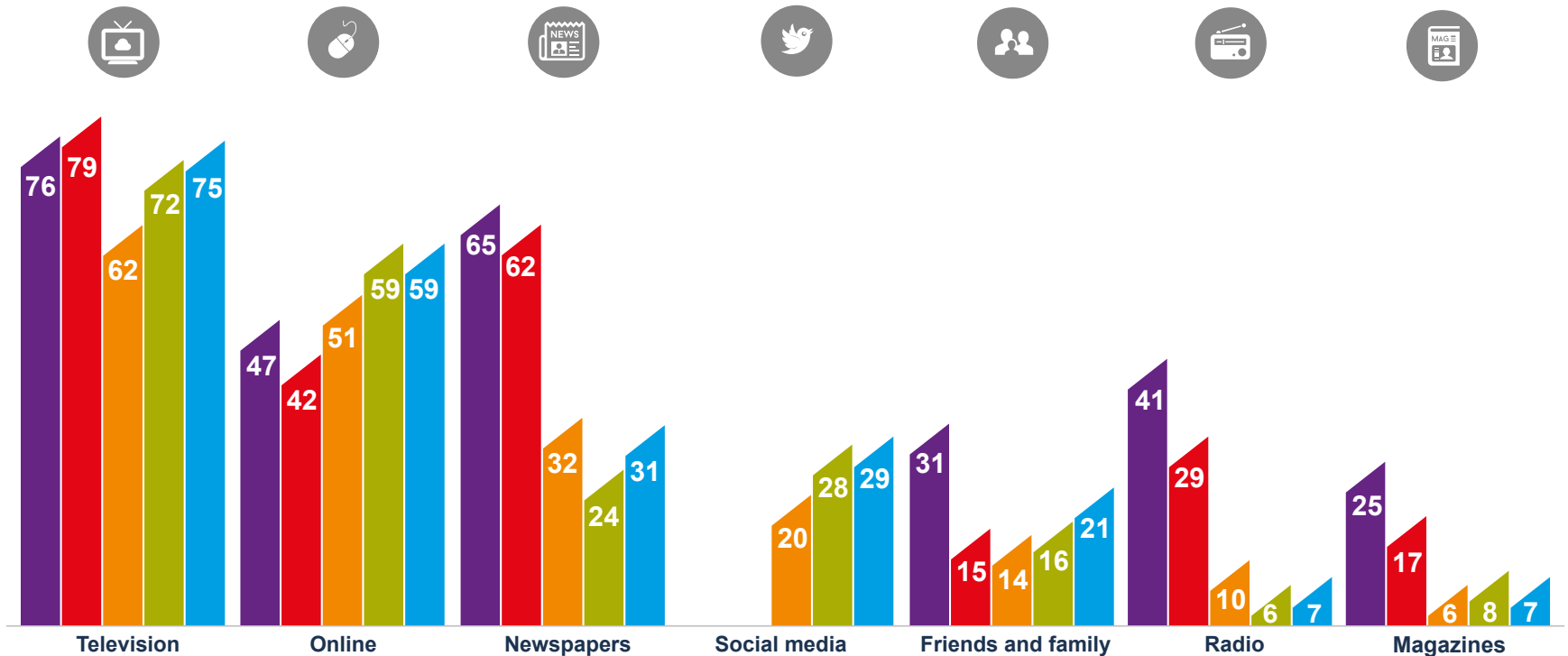
10

TELEVISION IS THE MOST POPULAR SOURCE OF NEWS FOR THE SIXTH YEAR RUNNING, BUT A GROWING NUMBER OF YOUNG ARABS ARE TURNING TO ONLINE AND SOCIAL NETWORKS TO GET THEIR NEWS

NEWS SOURCES

Where do you get your news?

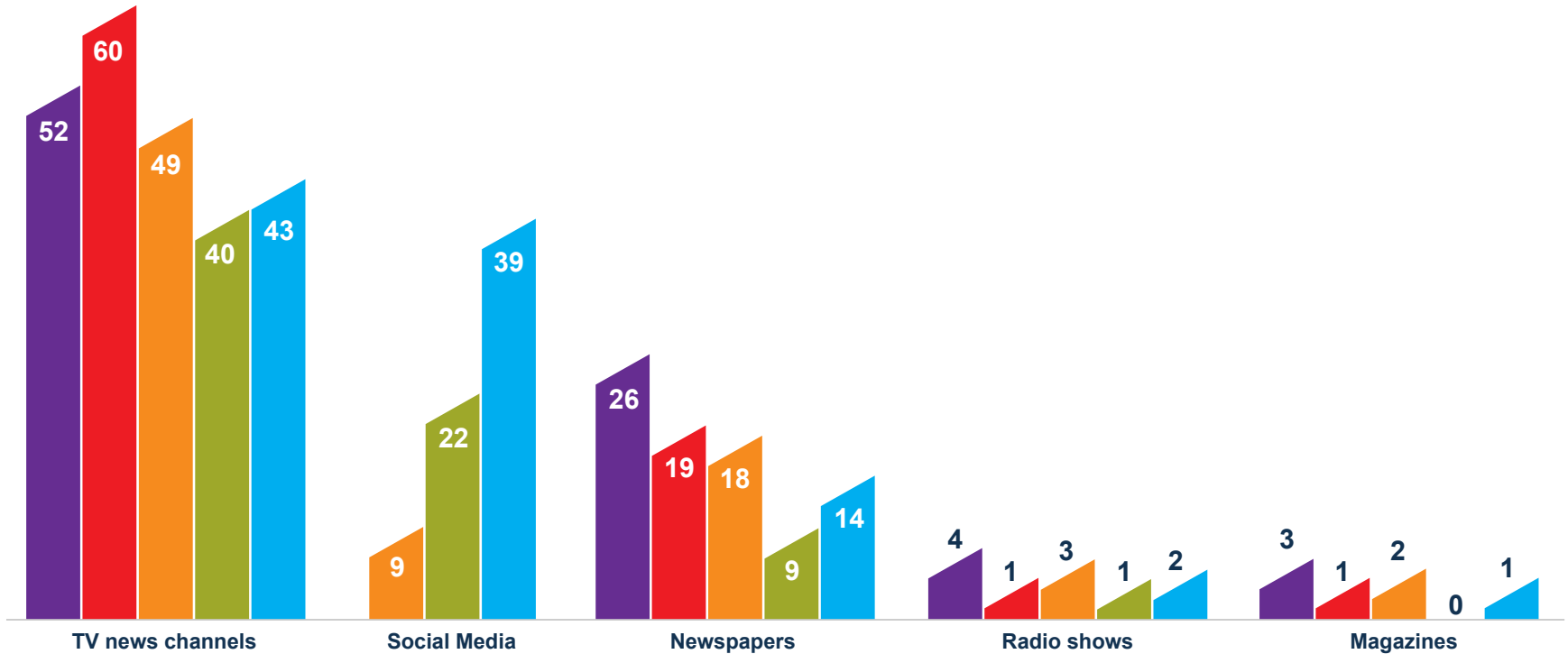
2010 2011 2012 2013 2014



TRUSTED NEWS SOURCES

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

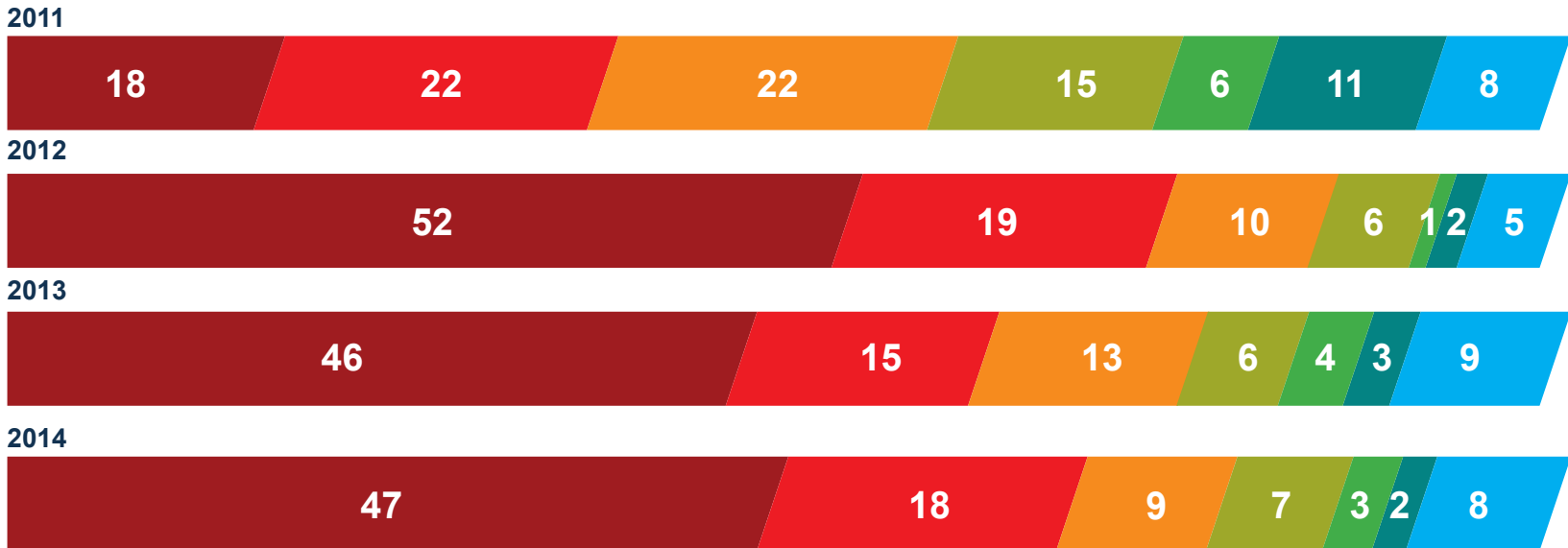
■ 2010 ■ 2011 ■ 2012 ■ 2013 ■ 2014



NEWS CONSUMPTION

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

■ Daily
 ■ Nearly every day
 ■ 2-3 times a week
 ■ Once a week
 ■ Once every 2-3 weeks
 ■ Once a month
 ■ Never



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