

ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2015

7th Annual ASDA'A Burson-Marsteller Arab Youth Survey

April 21, 2015



ABOUT THE SURVEY

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

SURVEY METHODOLOGY

The study was commissioned in January 2015. The interviews were conducted from January 20th to February 12th, 2015 by professional interviewers. The interviews were completed in Arabic and English. Margin of error is +/-1.65% for the total sample and larger for sub-groups.

Sample details:

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 30%	Alexandria 25%	Irbid 25%	Saida 20%
Sharjah 20%				Dammam 20%	Al Ahmadi 20%	Mansoura 25%	Zarqa 25%	Tripoli 20%
					Farwaniya 30%			

SURVEY METHODOLOGY

Sample details:

Iraq	Tunisia	Libya	Algeria	Morocco	Yemen	Palestine
N=250	N=200	N=200	N=200	N=200	N=200	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%	Soussa 25%	Misrata 25%	Constantine 25%	Rabat 25%	Ta'izz 25%	
				Marrakech 25%		

NEW COUNTRY IN 2011

NEW COUNTRIES IN 2012

NEW COUNTRIES IN 2013

NEW COUNTRY IN 2014

Top 10 Findings

What do 200 million Arab youth have to say about their future?

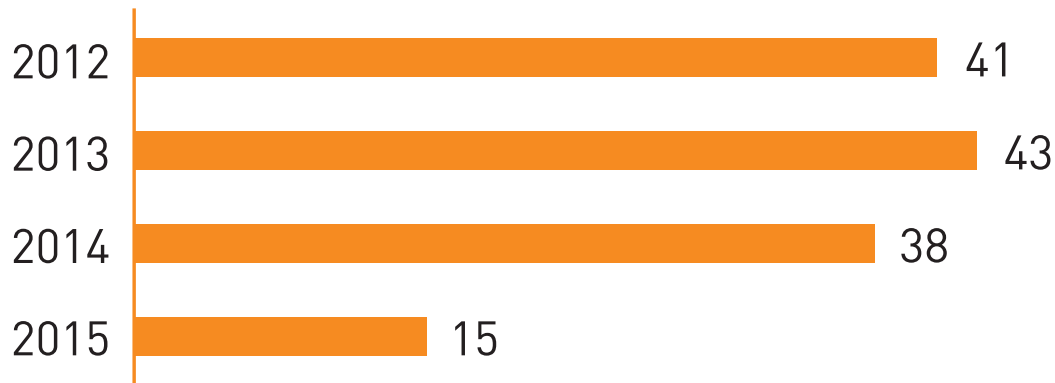


1

With the legacy of the Arab Spring waning, Arab youth are uncertain whether democracy could ever work in the Middle East.

Lack of democracy, in previous years seen as one of the top obstacles, is now considered to be the biggest obstacle facing the Middle East by merely 1 in 6 young Arabs

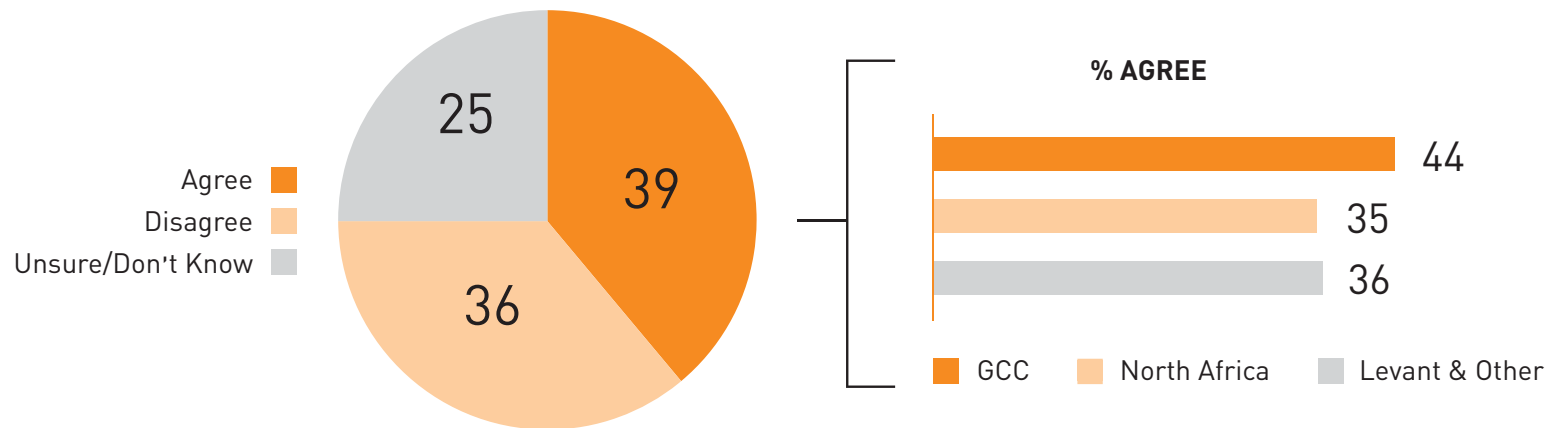
What do you believe is the biggest obstacle facing the Middle East?
Showing % choosing "Lack of Democracy" as the biggest obstacle



Arab youth are uncertain whether democracy will ever work in the Middle East. Just 1 in 3 disagree that democracy will never work in the region.

How strongly do you agree or disagree with the statement?

“Democracy will never work in the Middle East”

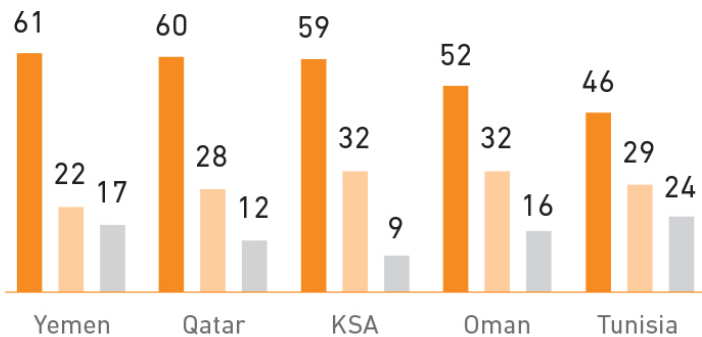


There are significant differences within individual countries on democracy, including countries that have recently gone through democratic transitions.

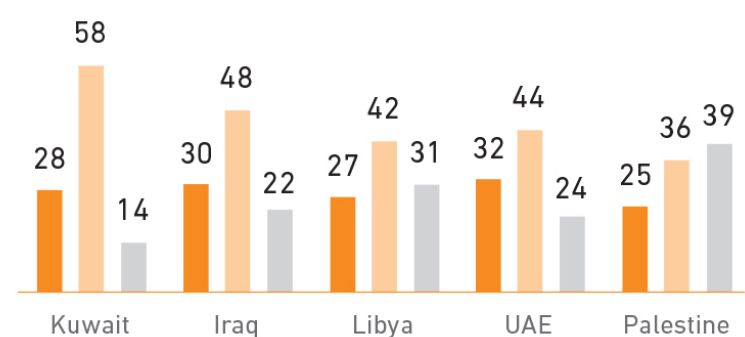
How strongly do you agree or disagree with the statement?

“Democracy will never work in the Middle East”

COUNTRIES MOST SCEPTICAL ABOUT DEMOCRACY



COUNTRIES MOST OPTIMISTIC ABOUT DEMOCRACY

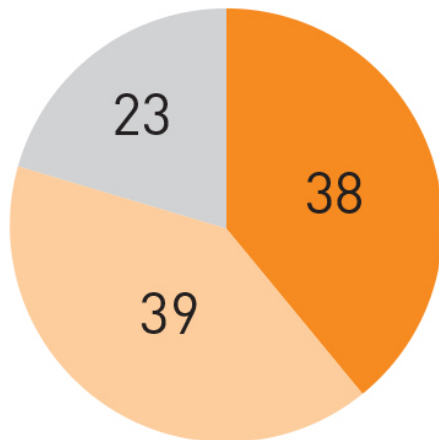


■ Agree
 ■ Disagree
 ■ Unsure/Don't know

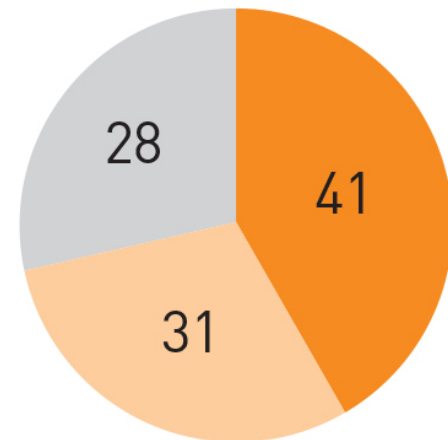
Arab youth are divided on the impact the Arab Spring has had, both in the region and their personal future.

How strongly do you agree or disagree with the statement?

“Following the Arab Spring, I feel the Arab world is better off”



“Following the Arab Spring, I feel I will be better off in five years”

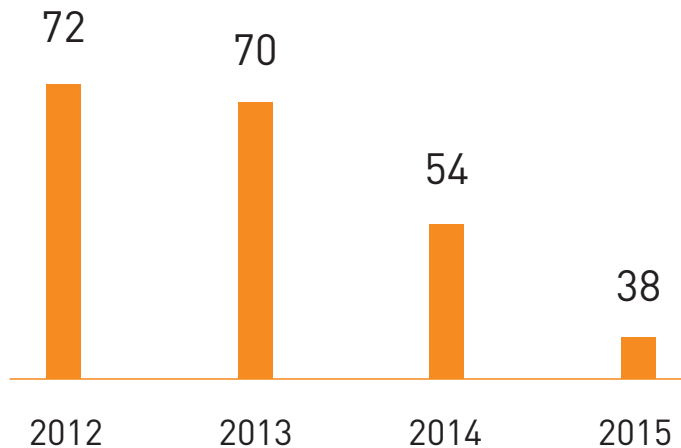


■ Agree
■ Disagree
■ Unsure/Don't Know

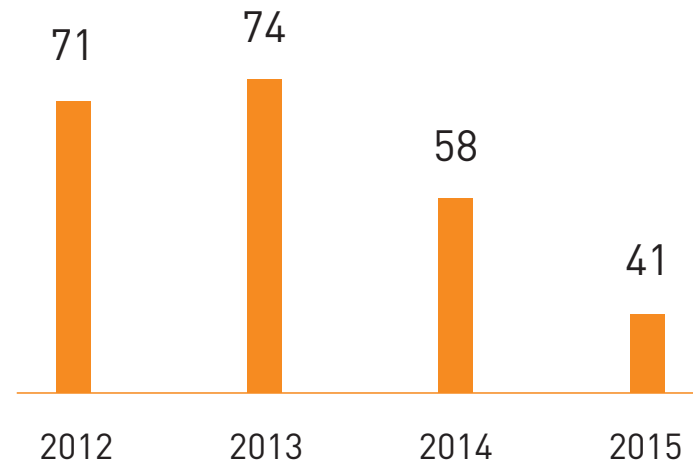
Positive perceptions of the impact the Arab Spring would have are on a steady decline.

How strongly do you agree or disagree with the statement? *Showing % agree*

“Following the Arab Spring, I feel the Arab world is better off.”



“Following the Arab Spring, I feel I will be better off in five years.”



2

The rise of ISIS is seen as the biggest obstacle facing the region and fewer than half of Arab youth are confident their national government can deal with it.

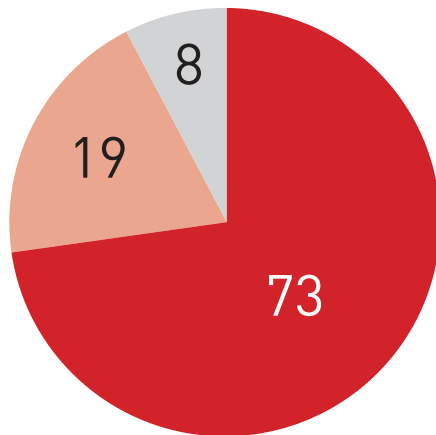
Arab youth view the rise of ISIS as the biggest obstacle facing the region, followed by “threat of terrorism” and “unemployment”.

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



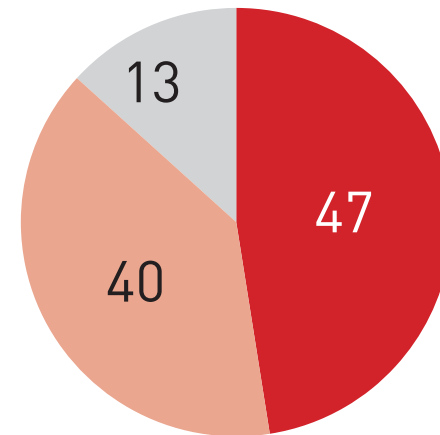
The vast majority of Arab youth are concerned about the rise of ISIS, but less than half are confident their government can deal with the threat.

How concerned would you say you are about the rise of ISIS?



- Concerned
- Not Concerned
- Don't Know

How confident are in your national government's ability to deal with the rise of ISIS?

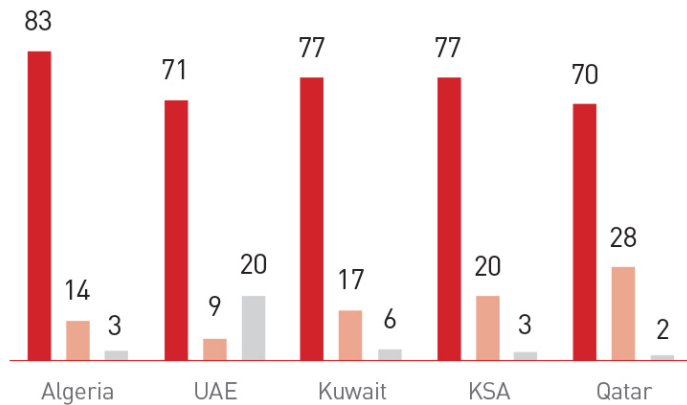


- Confident
- Not Confident
- Don't Know

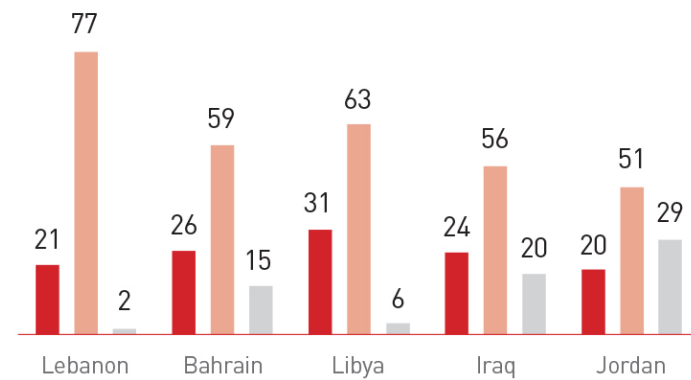
Some of the countries directly affected by ISIS have very little confidence in their national government's ability to deal with the group.

How confident are you in your national government's ability to deal with the rise of ISIS?

COUNTRIES MOST CONFIDENT IN THEIR GOVERNMENT'S ABILITY TO DEAL WITH ISIS.



COUNTRIES LEAST CONFIDENT IN THEIR GOVERNMENT'S ABILITY TO DEAL WITH ISIS.



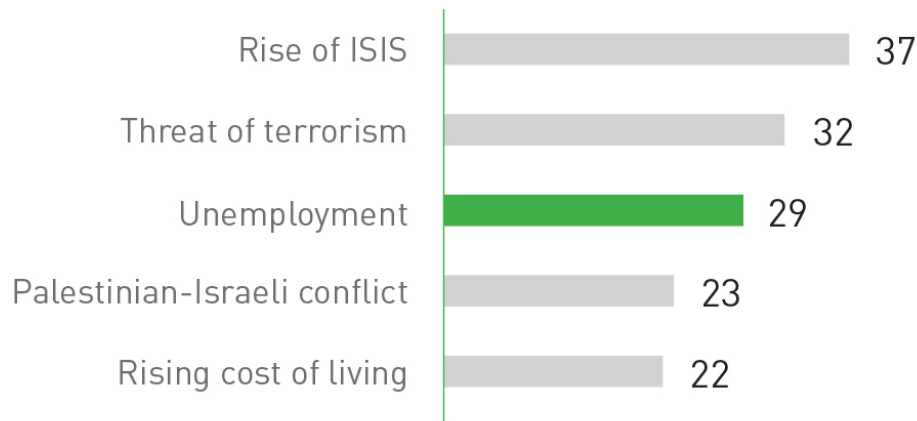
■ Confident
 ■ Not Confident
 ■ Don't Know

3

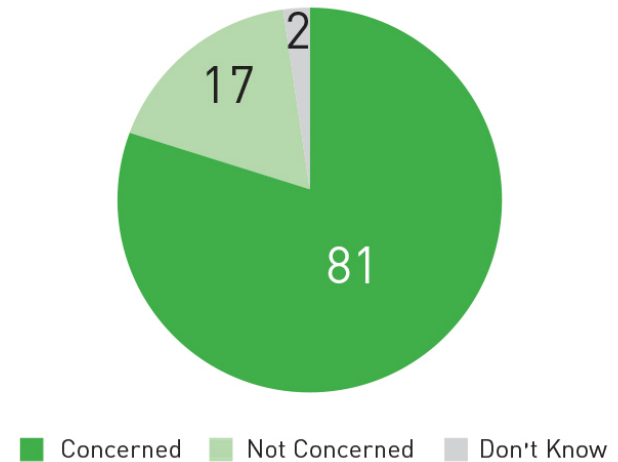
As unemployment remains a major concern in the region, many young Arabs are keen to start their own business.

Unemployment remains among the top three perceived obstacles facing the region, with 4 in 5 young Arabs concerned about unemployment.

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



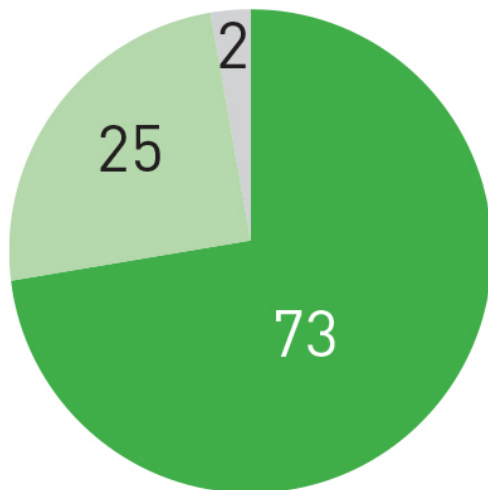
How concerned would you say you are about unemployment?



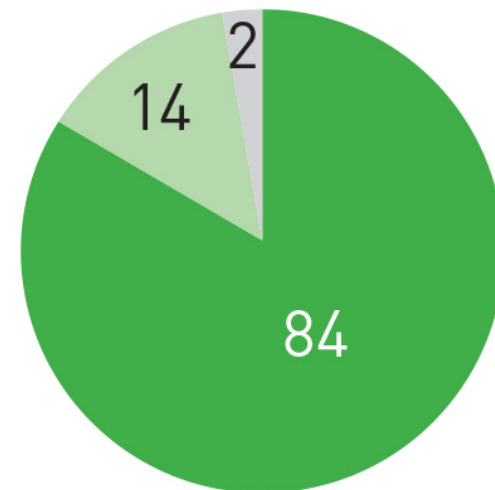
Unemployment is a more urgent issue in the non-GCC countries.

How concerned would you say you are about unemployment?

GCC Countries



Non-GCC Countries



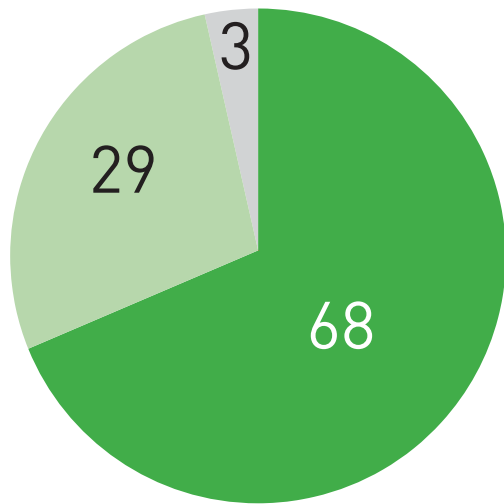
■ Concerned

■ Not Concerned

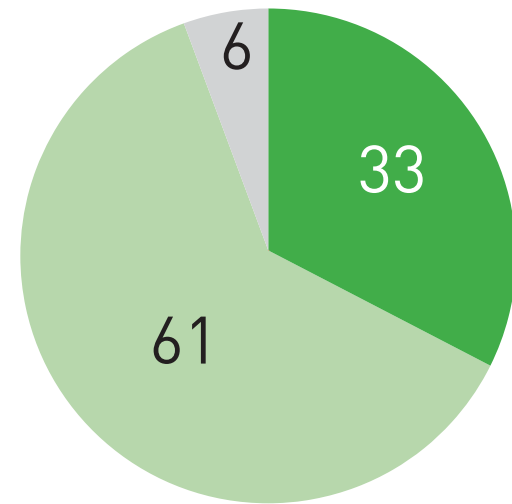
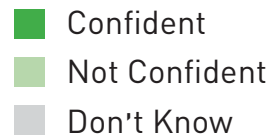
■ Don't Know

Only a third of young non-GCC Arabs have confidence in their government's ability to tackle unemployment, compared to two-thirds in the GCC.

How confident are you in your government's ability to deal with unemployment?



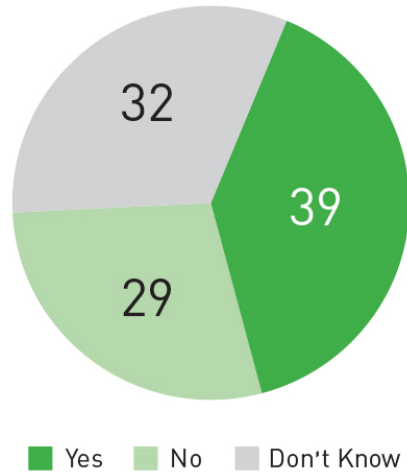
GCC Countries



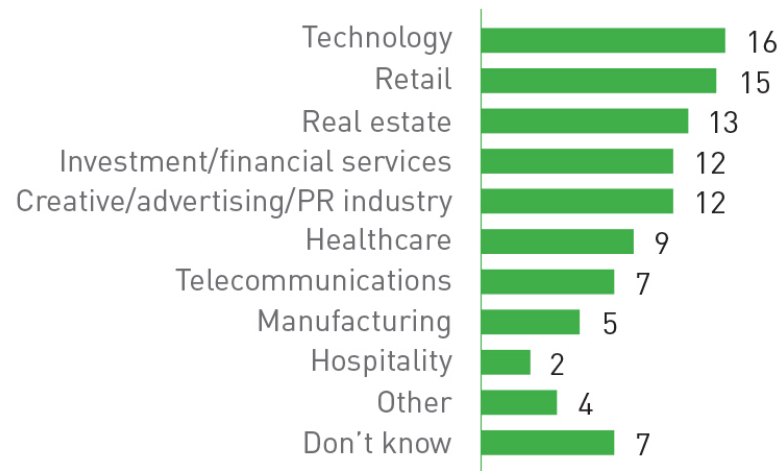
Non-GCC Countries

Nearly two in five young Arabs are looking to start a business within the next five years, with technology and retail being the top sectors of interest.

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

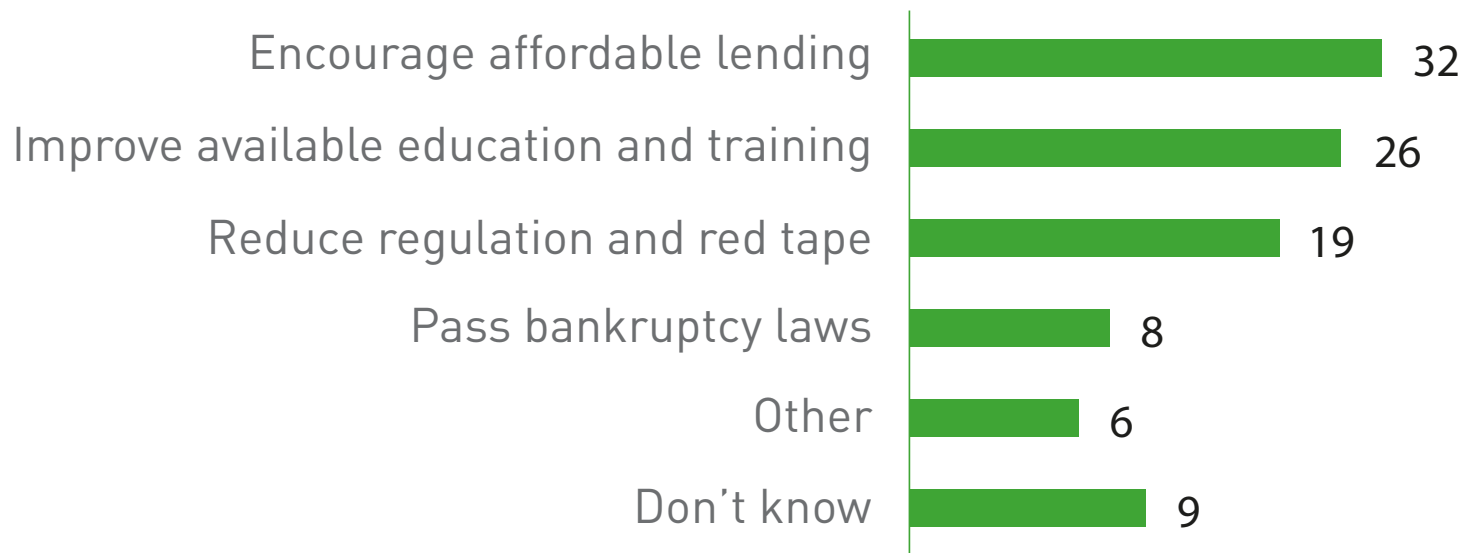


If intends to start: In which industry would you like to set your business up in?



Affordable loans and better access to training are the most effective ways governments can encourage entrepreneurship among Arab youth.

What should your government do to promote entrepreneurship?

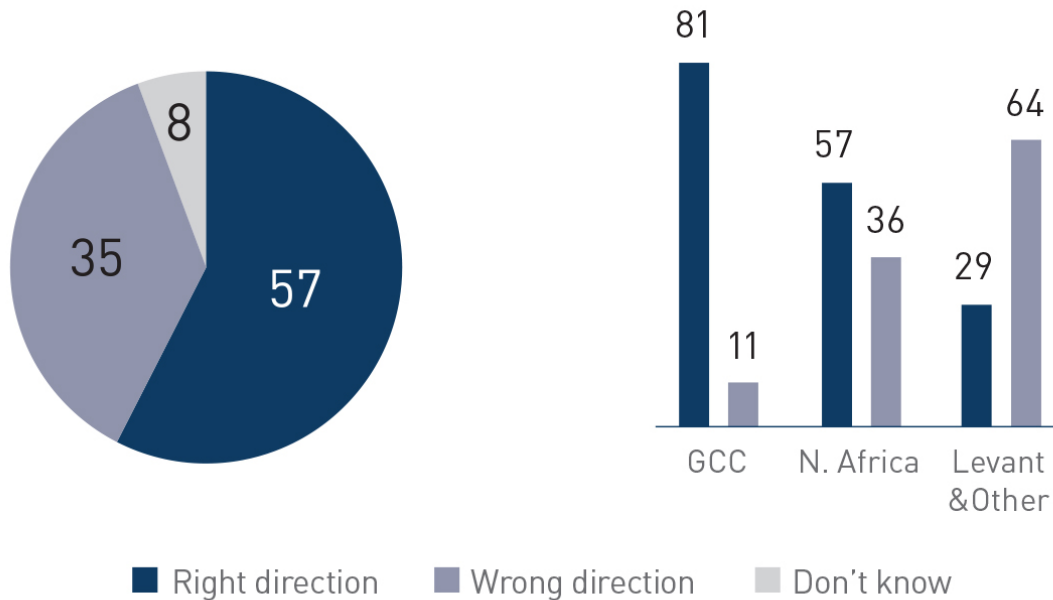


4

Arab youth remain cautiously optimistic about the future, despite the number of issues facing the region.

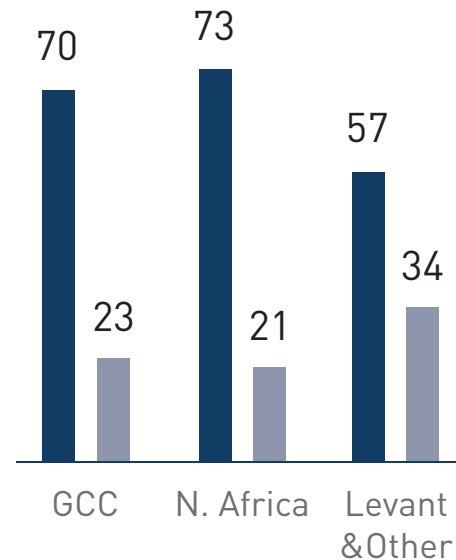
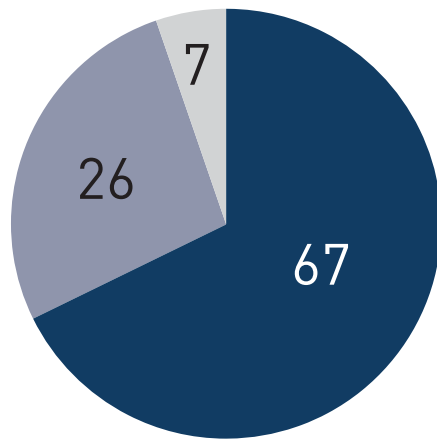
Overall, Arab youth believe their country is headed in the right direction, but there are significant regional differences.

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



Arab youth are more optimistic looking long-term than they are about the current course of their country.

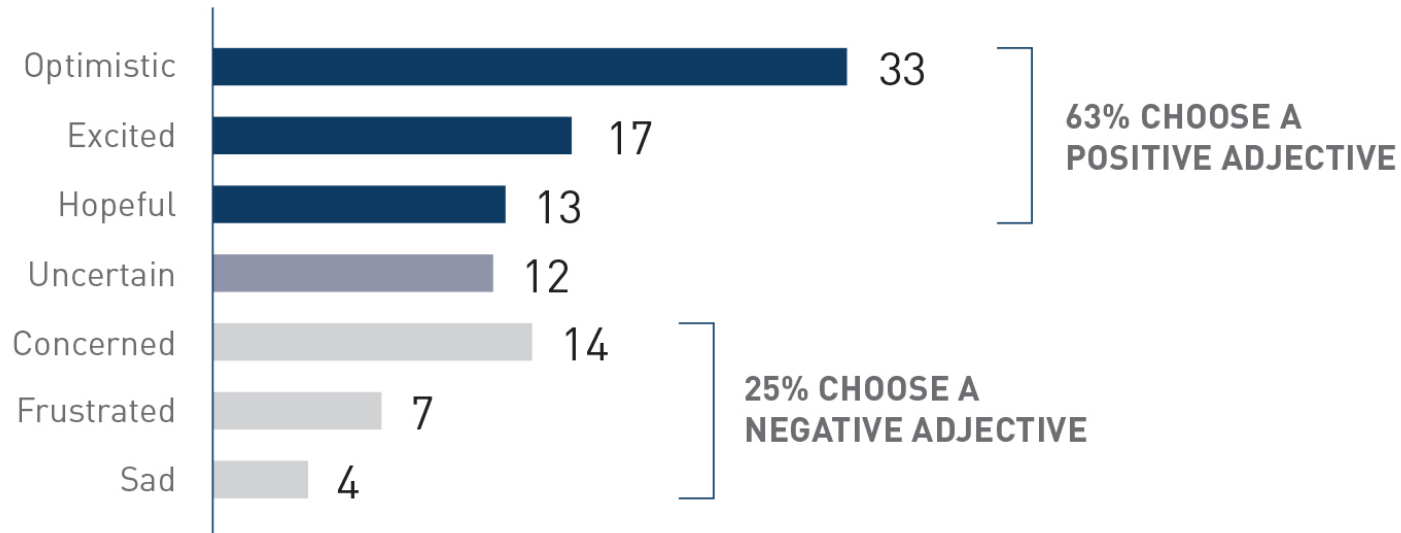
Which of the following do you agree with?



"Our best days are ahead of us"
 "Our best days are behind us"
 Don't know

Positive long-term feelings about the future are also reflected when Arab youth are asked to choose an adjective to describe the future of their country.

Which, if any, best describes how you feel about the future of your country?

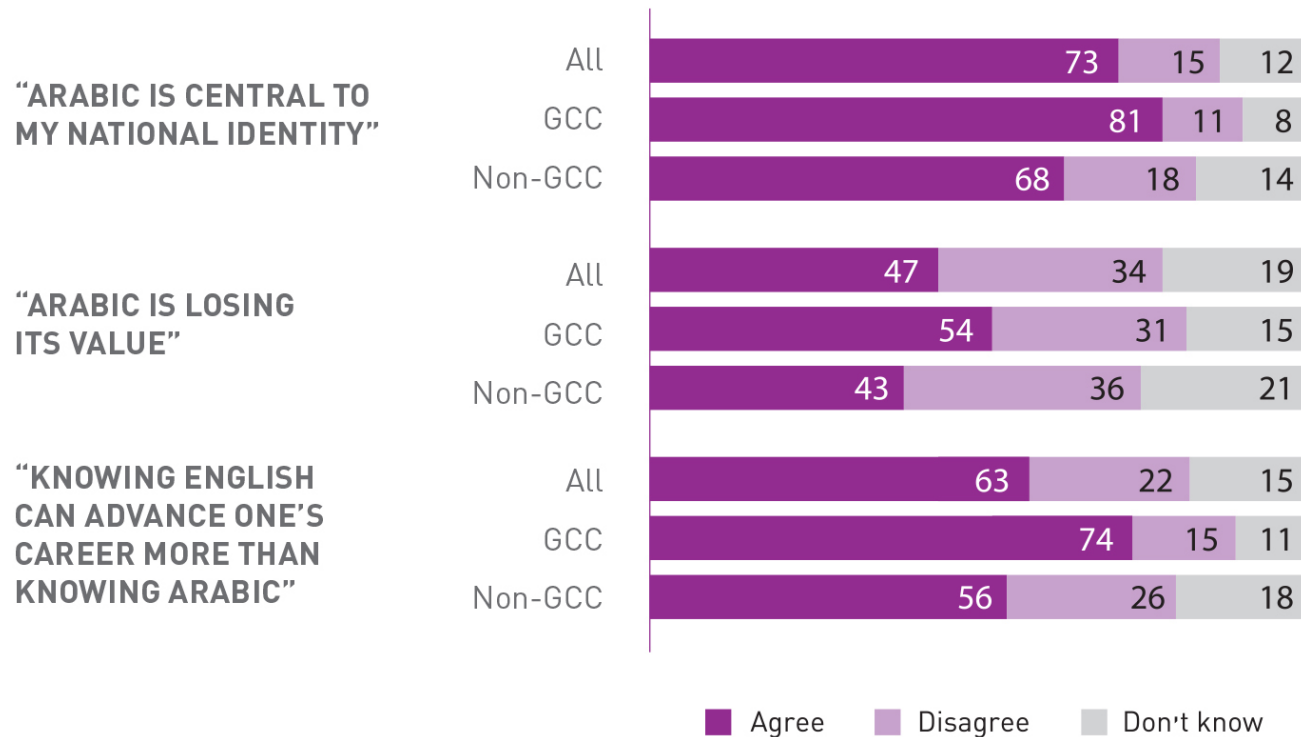


5

While youth view the Arabic language as central to their national identity, many believe it is losing its value and converse more in English.

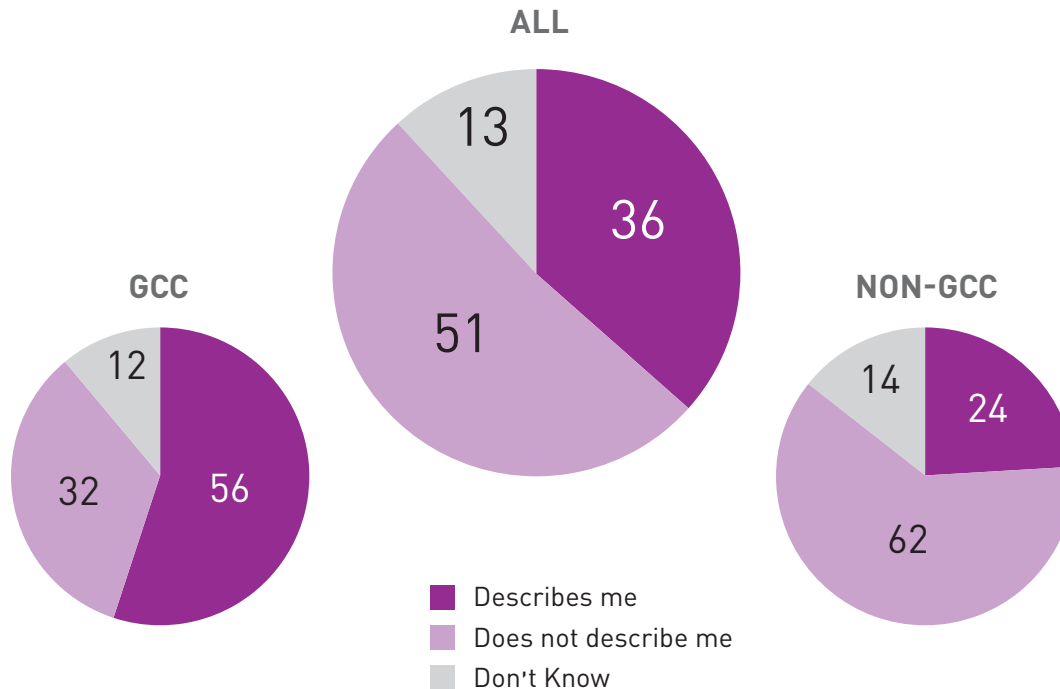
Arabic is seen as being central to one's national identity, but Arab youth, especially in the GCC, believe Arabic is losing its value, especially in the professional world.

How strongly do you agree or disagree with the following statement?



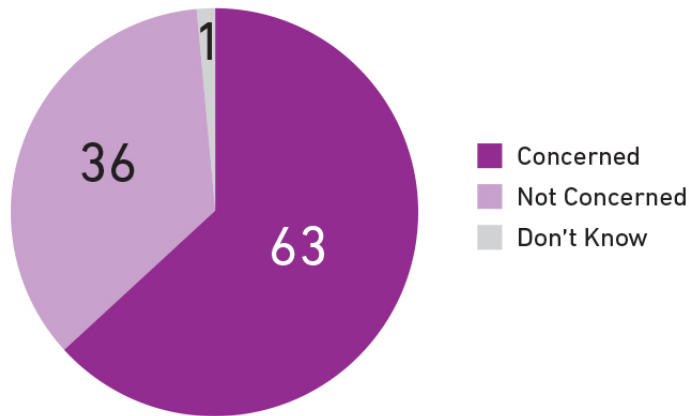
Major regional differences on the daily usage of Arabic, with a majority of the GCC youth saying they use English more than Arabic.

How well does this statement describe you?
“On a daily basis, I use English more than Arabic”

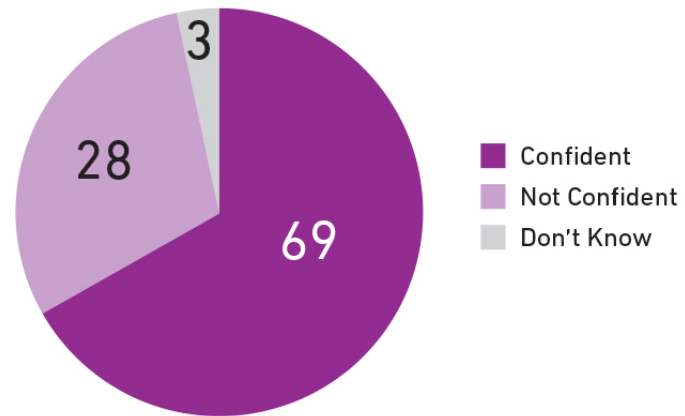


While most express concern about the declining use of Arabic, even more are confident their national government can be effective in preserving the Arabic language.

How concerned would you say you are about the declining use of Arabic?



How confident are you in your national government's ability to deal with preserving the Arabic language?

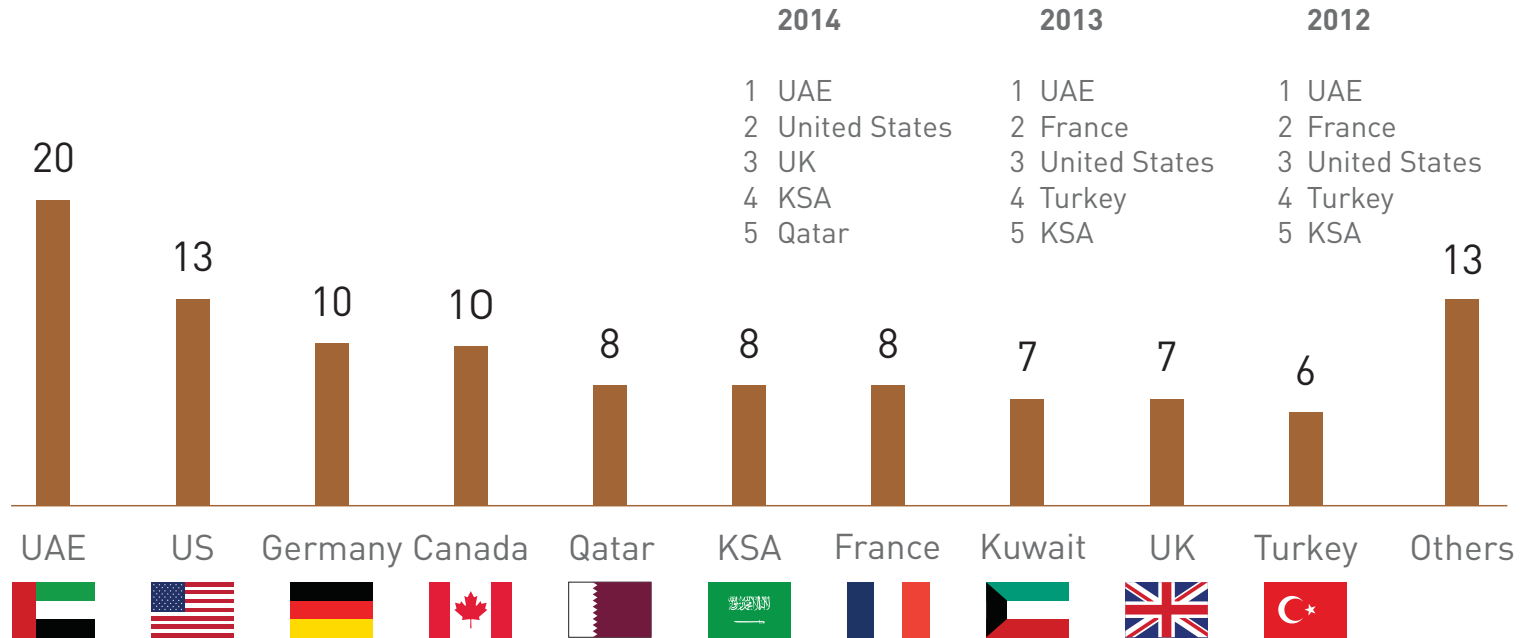


6

The UAE remains the country that most Arab youth would like to live in and is seen as a model for their country to emulate for the fourth year running.

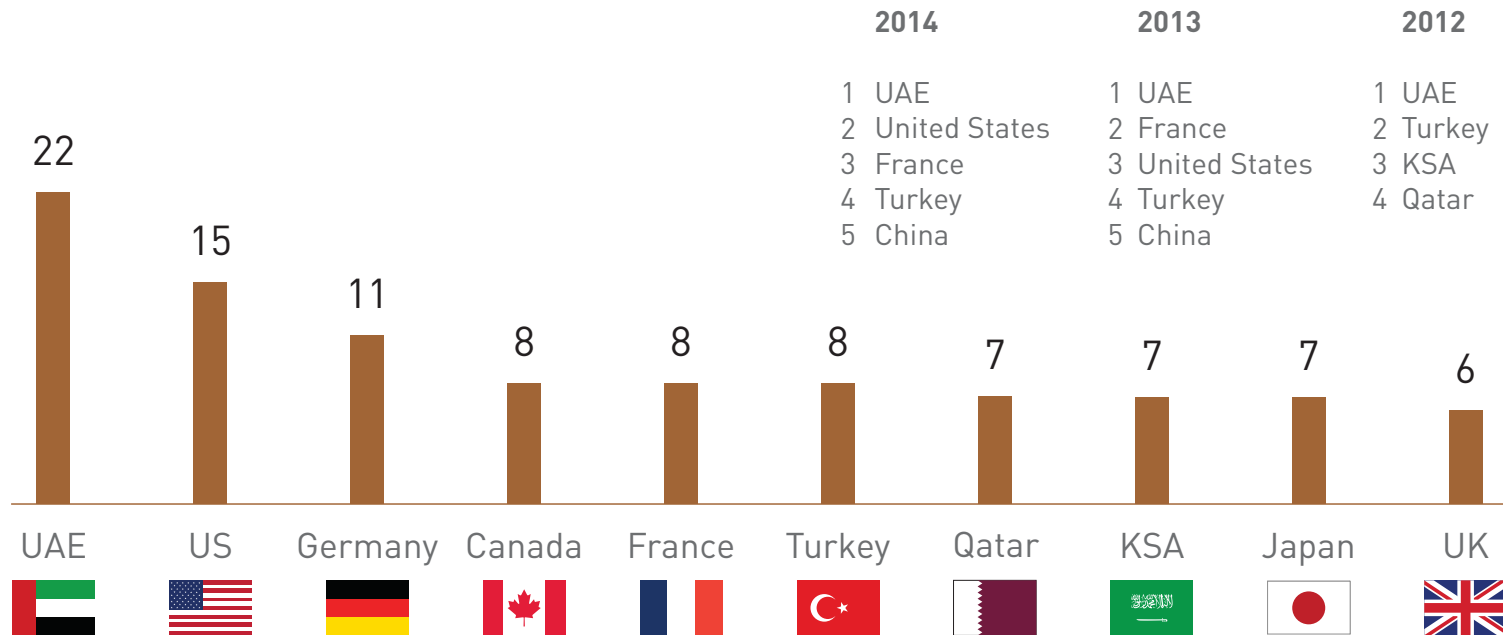
Arab youth continue viewing the UAE as a model country where many young people would like to live in.

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



The UAE also remains the top country Arab youth want their country to emulate, making it the only Arab country in the top five.

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

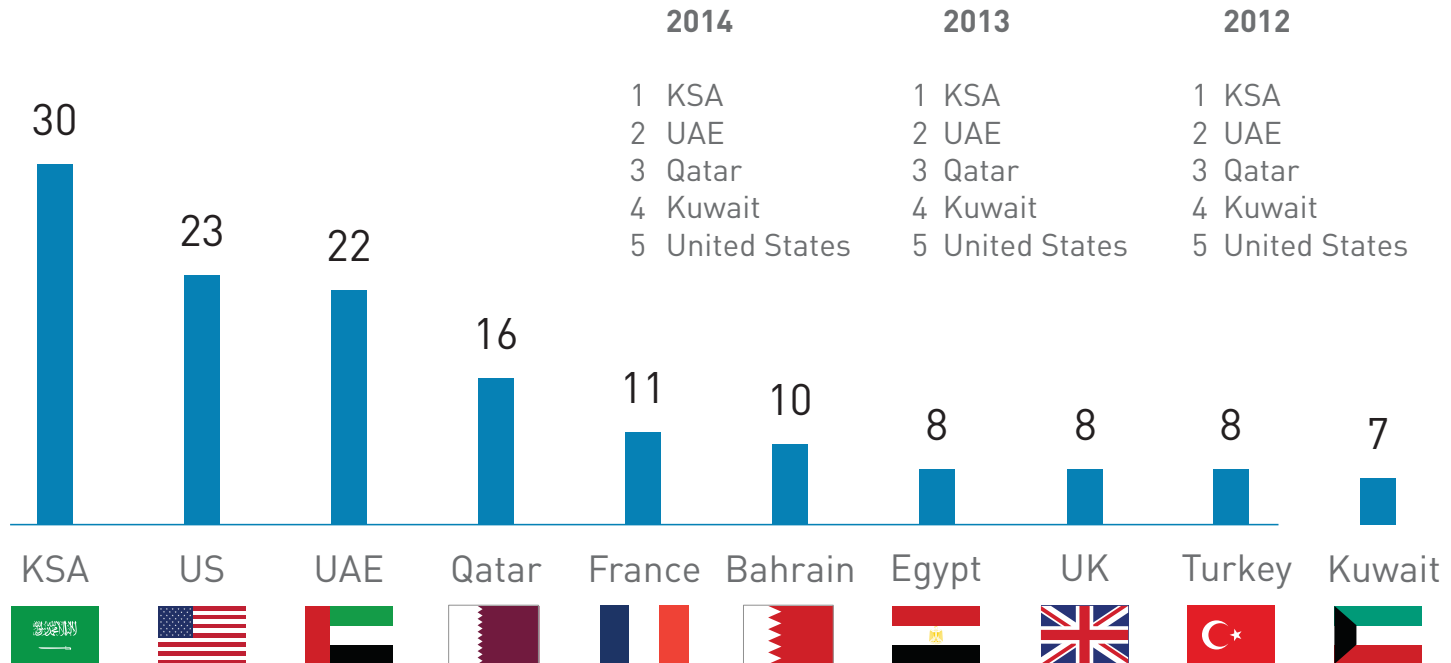


7

Saudi Arabia is seen as the top ally in the region, followed by the United States and the United Arab Emirates.

Saudi Arabia remains the top ally among the youth in the region, followed by the United States and the UAE. The US has moved from being number 5 to being the second choice.

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



The Saudi foreign policy influence is evident across the entire region, with Arab youth in 12 countries listing it as one of the top three allies.

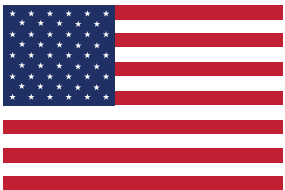
Who would you say is your country's biggest ally?

SAUDI ARABIA SEEN AS ONE OF THE TOP THREE ALLIES BY:



UAE	Algeria
Qatar	Morocco
Oman	Jordan
Bahrain	Lebanon
Kuwait	Yemen
Egypt	Palestine

UNITED STATES SEEN AS ONE OF THE TOP THREE ALLIES BY:



Saudi Arabia	Iraq
UAE	Morocco
Qatar	Jordan
Bahrain	

UNITED ARAB EMIRATES SEEN AS ONE OF THE TOP THREE ALLIES BY:



Saudi Arabia	Oman
Qatar	Iraq
Bahrain	Egypt
Kuwait	

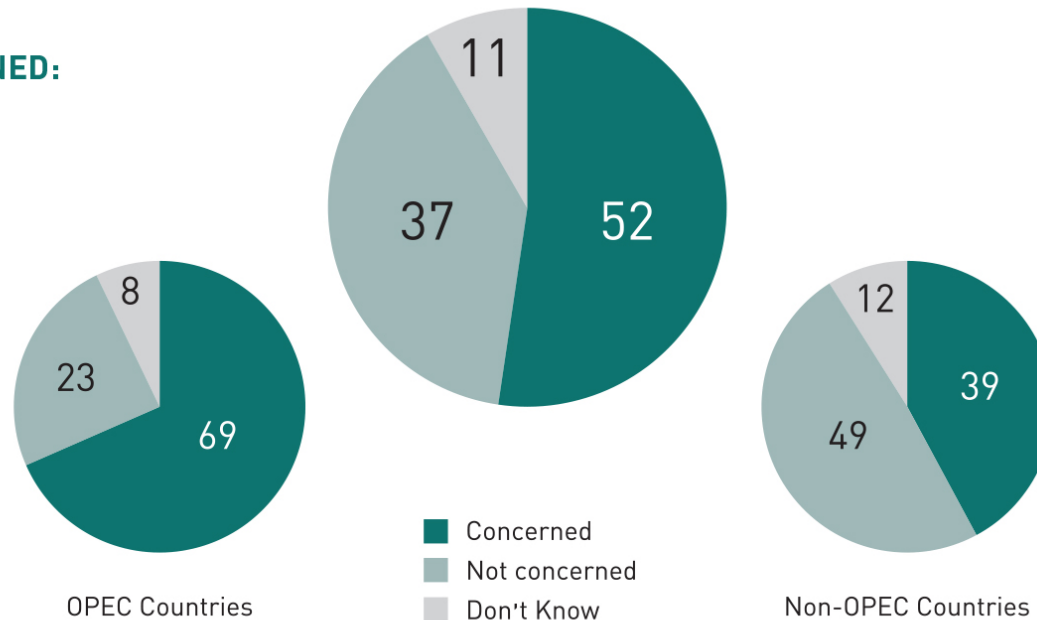
8

The majority of Arab youth, particularly in the OPEC countries, are concerned about the falling energy prices, but most also believe the drop is temporary.

Most Arab youth are concerned about falling energy prices, with the level of concern significantly higher in the OPEC member countries.

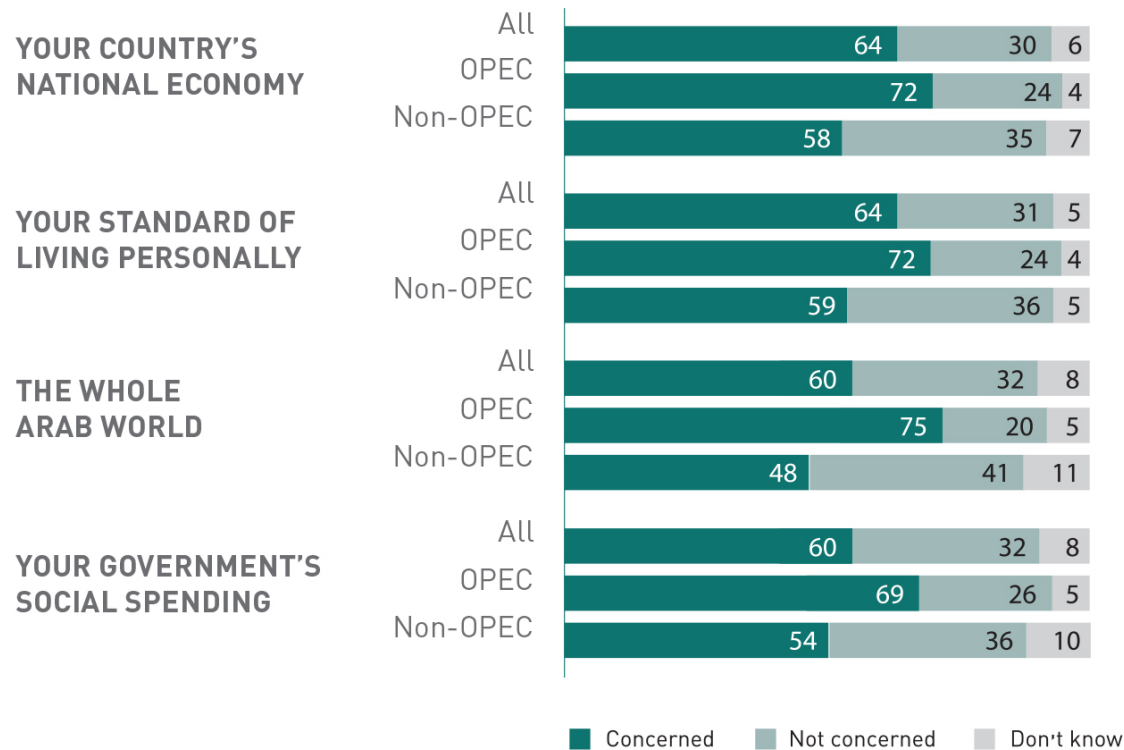
How concerned are you about falling energy prices?

MOST CONCERNED:
KUWAIT – 90%
LIBYA – 84%
ALGERIA – 75%
IRAQ – 64%



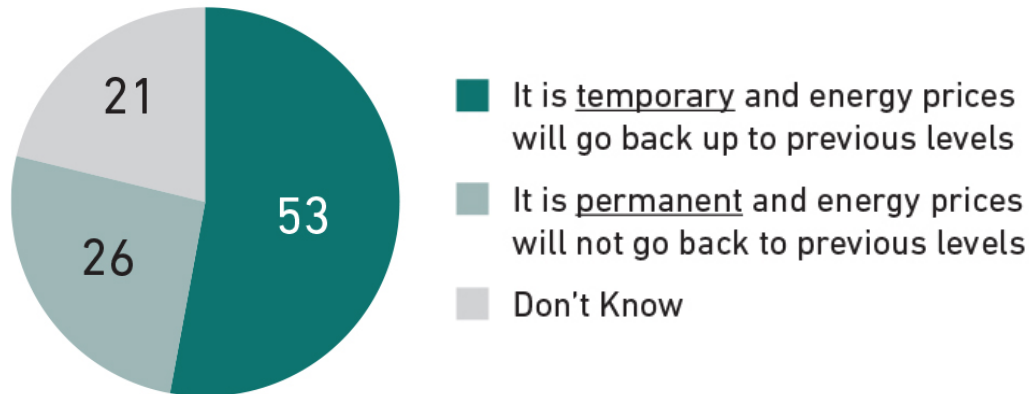
Most young Arabs are concerned about a number of negative impacts the falling energy prices might have.

How concerned are you that falling energy prices will have a negative impact on [...]?



With most believing the price drop is temporary, Arab youth are split on whether oil producing countries should decrease oil production or keep the current levels of production.

Which of the following is closer to your view about the recent drop in energy prices?



38% think oil producing countries should decrease oil production to bring back oil prices

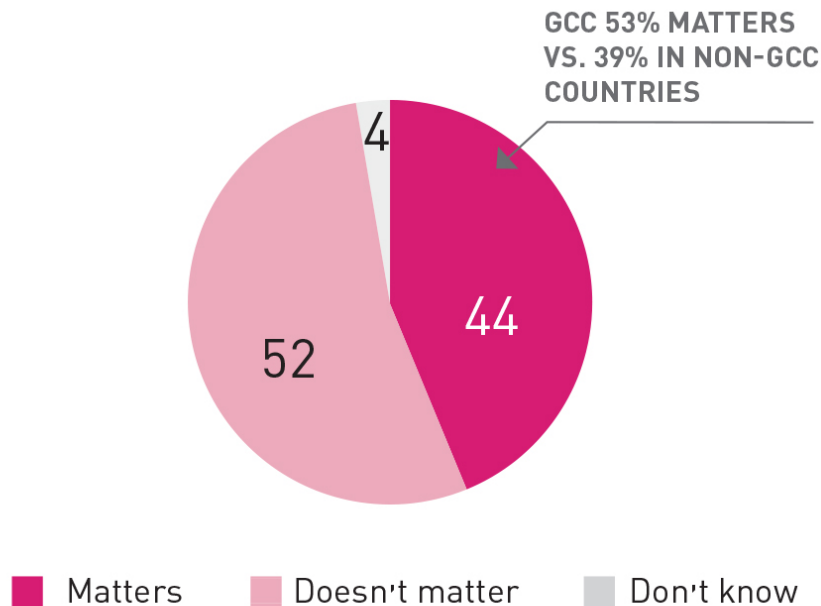
39% think the current levels of oil production should be continued

9

A brand's country of origin matters to many young Arabs and four in five do not rule out the possibility of boycotting a brand for political reasons.

Almost half of young Arabs say a brand's country of origin matters to them, with the UAE youth placing significantly more importance than any other country.

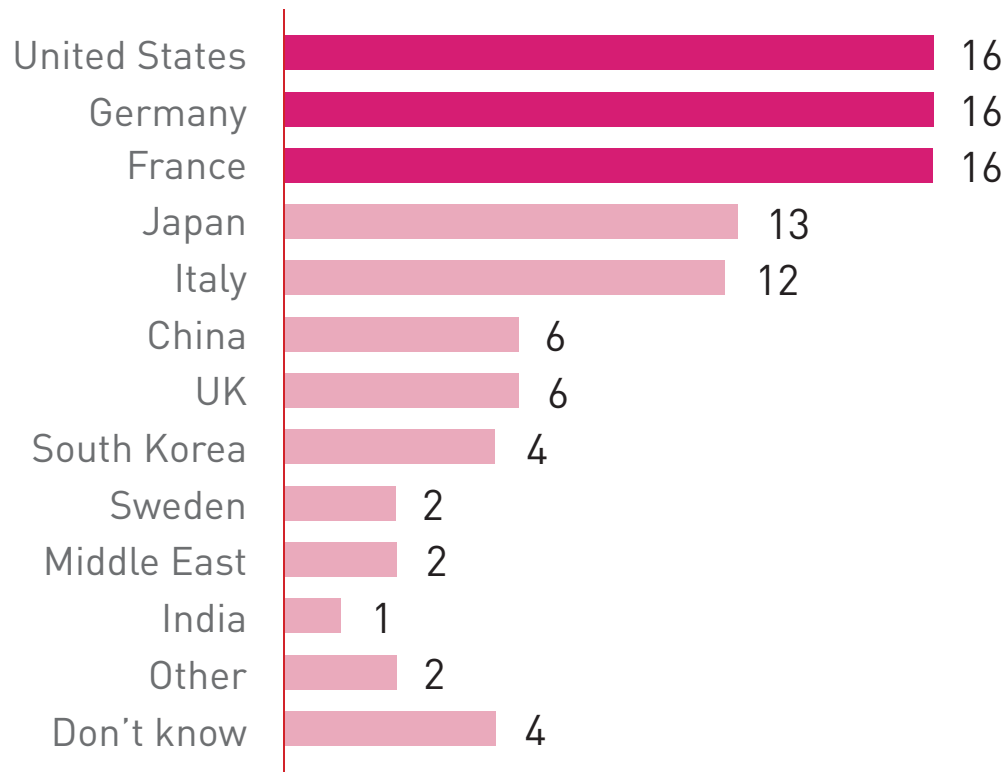
How much does a brand's country of origin matter to you?



Top 5 Matters	%Matters
United Arab Emirates	78%
Oman	58%
Qatar	56%
Egypt	55%
Algeria	54%

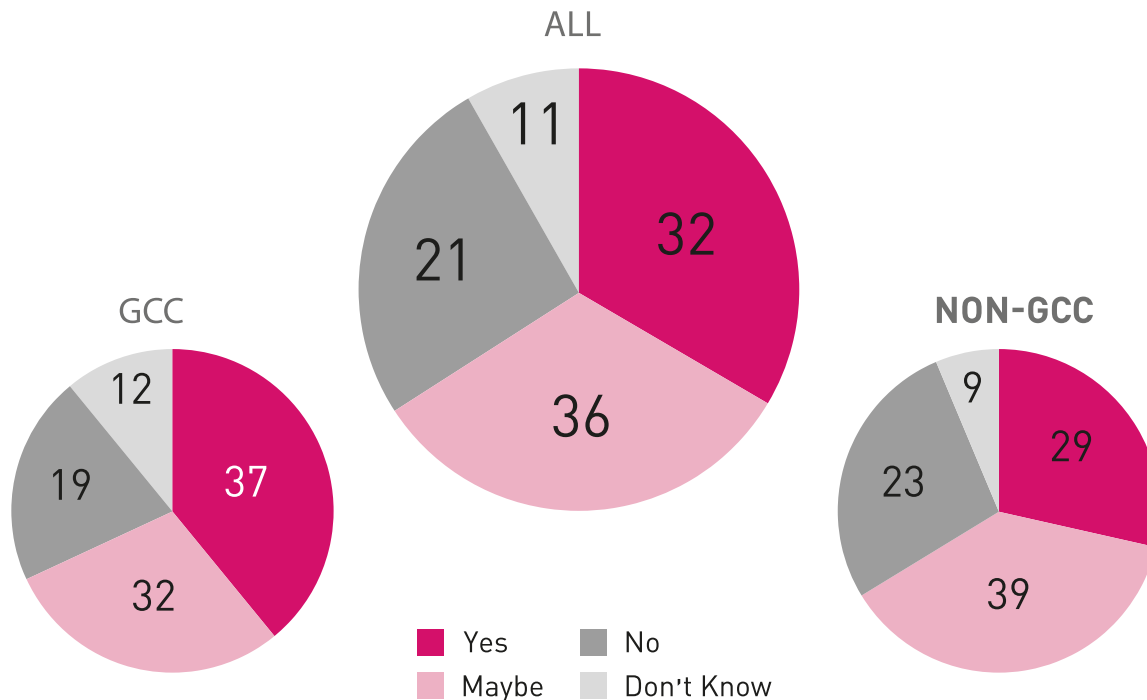
Arab youth prefer western brands, with American, German, and French brands at the top of the list.

Which brand country of origin is most appealing to you?



Merely 1 in 5 Arab youth rule out the possibility of boycotting a brand for political reasons.

Would you ever support the boycott of a brand for political reasons?

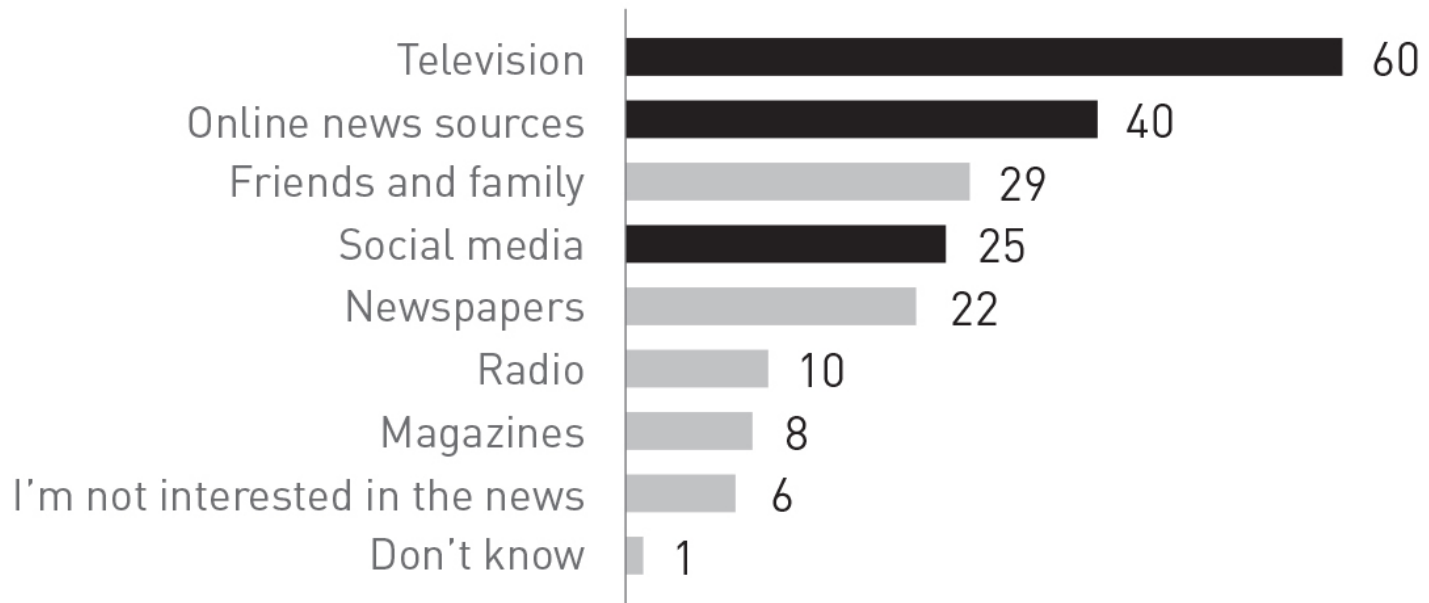


10

While digital media plays an increasingly central role in the daily lives of Arab youth, television is still king.

While television remains the most popular source of news (60 per cent), 40 per cent of young Arabs get their news from online sources and another 25 per cent from social media.

Where do you get your news?

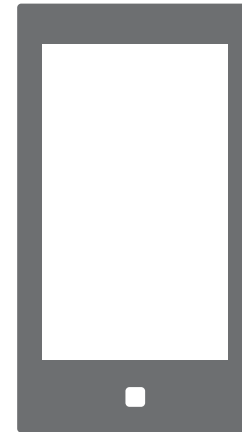


Five in six young Arabs are daily Internet users and more than three in four say they own a smartphone.

82% Daily
Internet Users



77% Own a
Smartphone

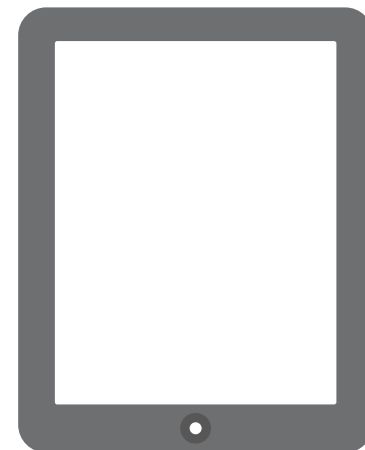


Nearly as many young Arabs get their news online at least once a week as they do television

79% watch TV News Channels at least once a week



75% read news Online at least once a week



Social media has become a major source of information among Arab youth, with 9 in 10 using social media and 2 in 5 sharing news articles on Facebook.

91% visit social media channels at least once a week, **53%** do so daily

41% use Facebook to share interesting news articles they read



Top 10 Findings

What do 200 million Arab youth have to say about their future?



1

With the legacy of the Arab Spring waning, Arab youth are uncertain whether democracy could ever work in the Middle East.

2

The rise of ISIS is seen as the biggest obstacle facing the region and fewer than half of Arab youth are confident their national government can deal with it.

3

As unemployment remains a major concern in the region, many young Arabs are keen to start their own business.

4

Arab youth remain cautiously optimistic about the future despite the number of issues facing the region.

5

While youth view the Arabic language as central to their identity, many believe it is losing its value and converse more in English.

6

The UAE remains the country that most Arab youth would like to live in and is seen as a model for their country to emulate for the fourth year running.

7

Saudi Arabia is seen as the top ally in the region, followed by the United States and the United Arab Emirates.

8

The majority of Arab youth, particularly in the OPEC countries, are concerned about the falling energy prices, but most also believe the drop is temporary.

9

A brand's country of origin matters to many young Arabs and four in five do not rule out the possibility of boycotting a brand for political reasons.

10

While digital plays an increasingly central role in the daily lives of Arab youth, television is still king.

“With the legacy of the Arab Spring waning, Arab youth are uncertain whether democracy could ever work in the Middle East”

A document on the findings of the ASDA'A Burson-Marsteller Arab Youth Survey 2015

Published in 2015 by ASDA'A Burson-Marsteller

This document can be obtained from the ASDA'A Burson-Marsteller Arab Youth Survey website: www.arabyouthsurvey.com

Copyright © 2015 ASDA'A Burson-Marsteller www.asdaabm.com

All rights reserved

No part of this document may be reproduced in any form or by any means without written permission of ASDA'A Burson-Marsteller

ASDA'A Burson-Marsteller and ASDA'A Burson-Marsteller Arab Youth Survey logos are trademarks of ASDA'A Burson-Marsteller. Other company, product and service names may be trademarks or service marks of their respective owners.

