

ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2016

— arabyouthsurvey.com —

#ArabYouthSurvey

# INSIDE 8TH ANNUAL ASDA'A BURSON-MARSTELLER ARAB YOUTH SURVEY

# THE HEARTS AND MINDS OF ARAB YOUTH





## ABOUT THE 2016 SURVEY

**3,500 face-to-face interviews conducted by 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 UAE

**Levant & Yemen:** Jordan, Iraq, Lebanon, Palestine and Yemen

**North Africa:** Algeria, Egypt, Libya, Morocco and Tunisia

## METHODOLOGY

The study was commissioned in January 2016. The interviews were conducted from January 11 to February 22 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%			

ORIGINAL COUNTRIES IN 2008-10

## METHODOLOGY

Sample details:

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%	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

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# TOP 10 FINDINGS

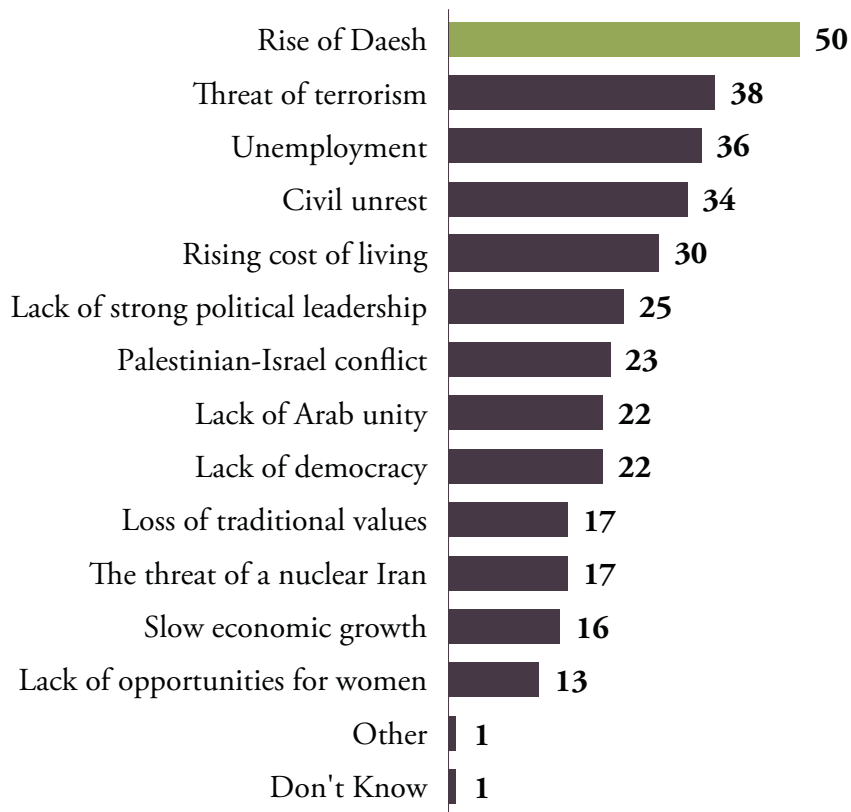


1

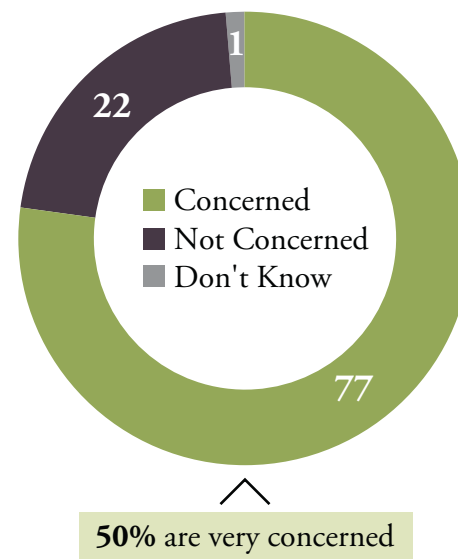
**AN OVERWHELMING MAJORITY OF  
YOUNG ARABS REJECT DAESH (ISIS)  
AND BELIEVE THE GROUP WILL FAIL  
TO ESTABLISH AN ISLAMIC STATE.**

**FOR THE SECOND YEAR IN A ROW, ARAB YOUTH VIEW THE RISE OF DAESH AS THE TOP OBSTACLE FACING THE MIDDLE EAST AND NEARLY 4 IN 5 EXPRESS CONCERN ABOUT THE TERRORIST GROUP'S RISE.**

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



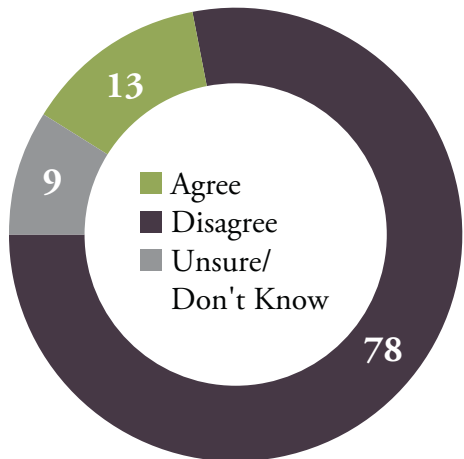
How concerned would you say you are about the rise of Daesh?



**NEARLY 4 IN 5 YOUNG ARABS RULE OUT ANY SUPPORT FOR THE GROUP EVEN IF DAESH STOPPED USING SO MUCH VIOLENCE AND MOST BELIEVE IT WILL ULTIMATELY FAIL TO ESTABLISH AN ISLAMIC STATE.**

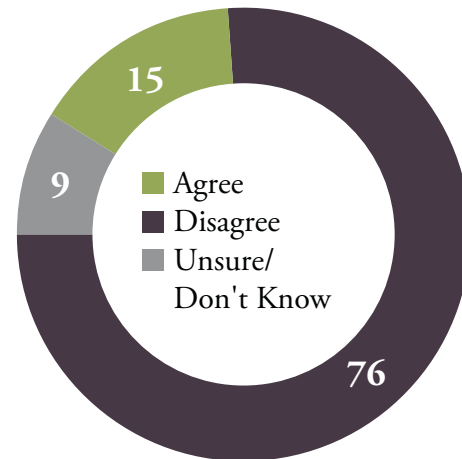
How strongly do you agree or disagree with the statement?

“If Daesh did not use so much violence, I could see myself supporting it”



GCC	72	19	9
Levant & Yemen	89	7	4
N. Africa	76	11	13

“Daesh will ultimately establish an Islamic State in the Arab world”



GCC	71	19	10
Levant & Yemen	87	7	6
N. Africa	71	17	12



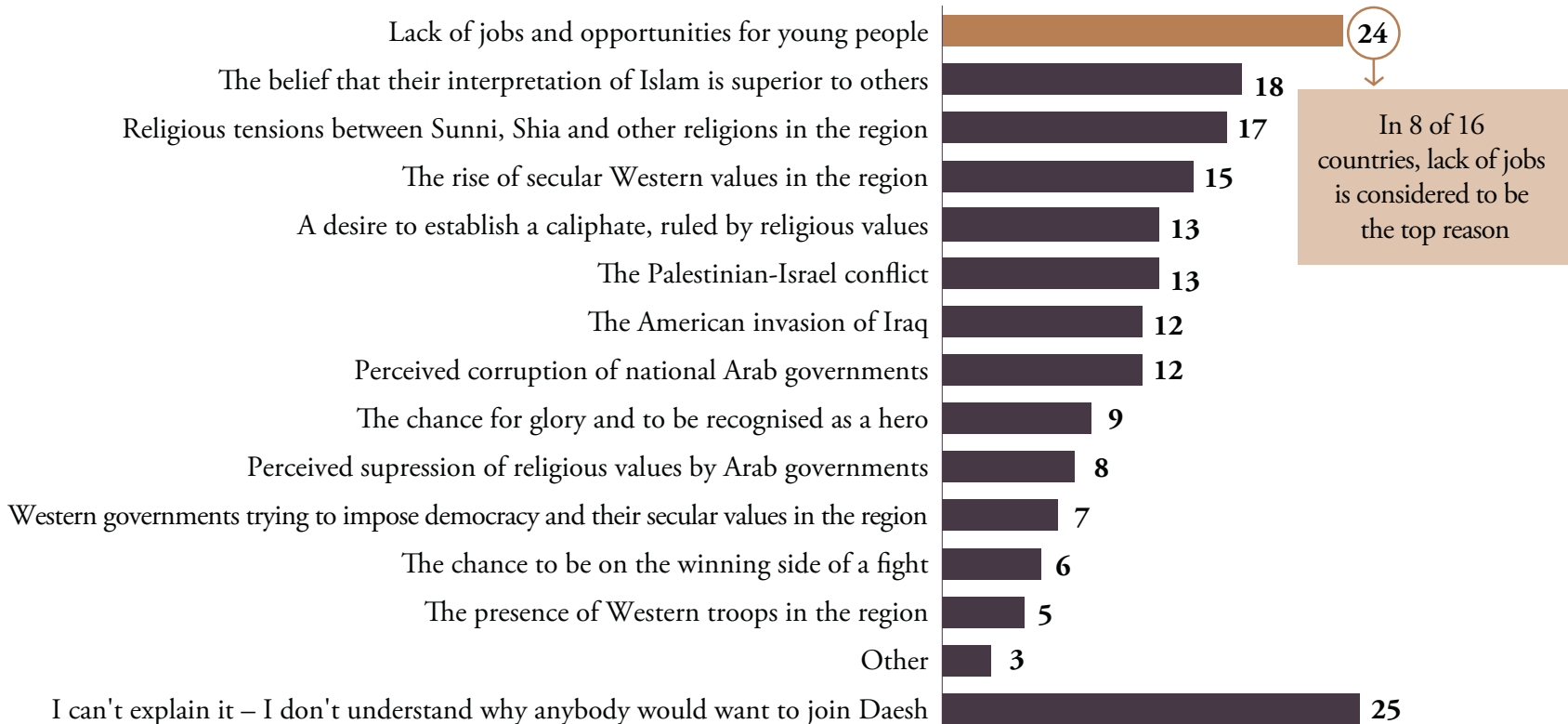


**2**

**LACK OF JOBS AND OPPORTUNITIES  
IS SEEN AS THE NUMBER ONE  
RECRUITMENT DRIVER FOR DAESH.**

## LACK OF JOBS IS SEEN AS THE TOP REASON YOUNG ARABS BELIEVE PEOPLE JOIN DAESH, ALTHOUGH 1 IN 4 DO NOT UNDERSTAND WHY ANYBODY WOULD JOIN THE GROUP.

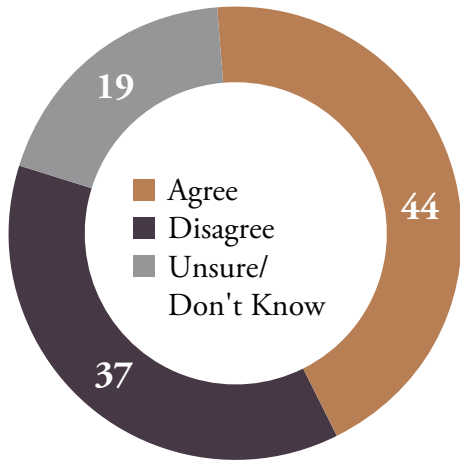
Which of the following, if any, do you think are the primary reasons why some young people are attracted to Daesh? Please choose up to three reasons.



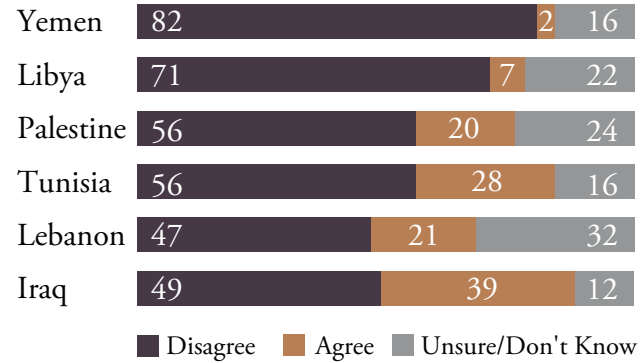
**FEWER THAN HALF OF ARAB YOUTH BELIEVE THERE ARE GOOD JOB OPPORTUNITIES AVAILABLE TO THEM, AND THE ISSUE IS PARTICULARLY ACUTE IN THE COUNTRIES WHERE DAESH HAS ACTIVELY RECRUITED YOUNG PEOPLE.**

How strongly do you agree or disagree with the statement?  
 “There are good job opportunities in the area I live in”

All Countries



Most Sceptical Countries



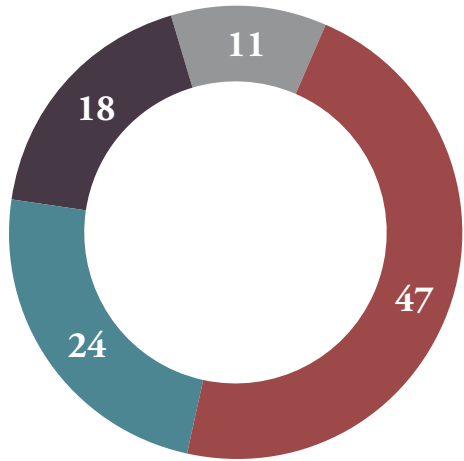


3

**MANY YOUNG ARABS BELIEVE SUNNI-SHIA RELATIONS ARE DETERIORATING AND THAT RELIGION PLAYS TOO BIG OF A ROLE IN THE MIDDLE EAST.**

## NEARLY HALF OF YOUNG ARABS THINK SUNNI-SHIA RELATIONS HAVE DETERIORATED OVER THE PAST FIVE YEARS, A PERCEPTION THAT EXISTS ACROSS THE ARAB WORLD.

Compared to five years ago, would you say the Sunni-Shia relations have...?



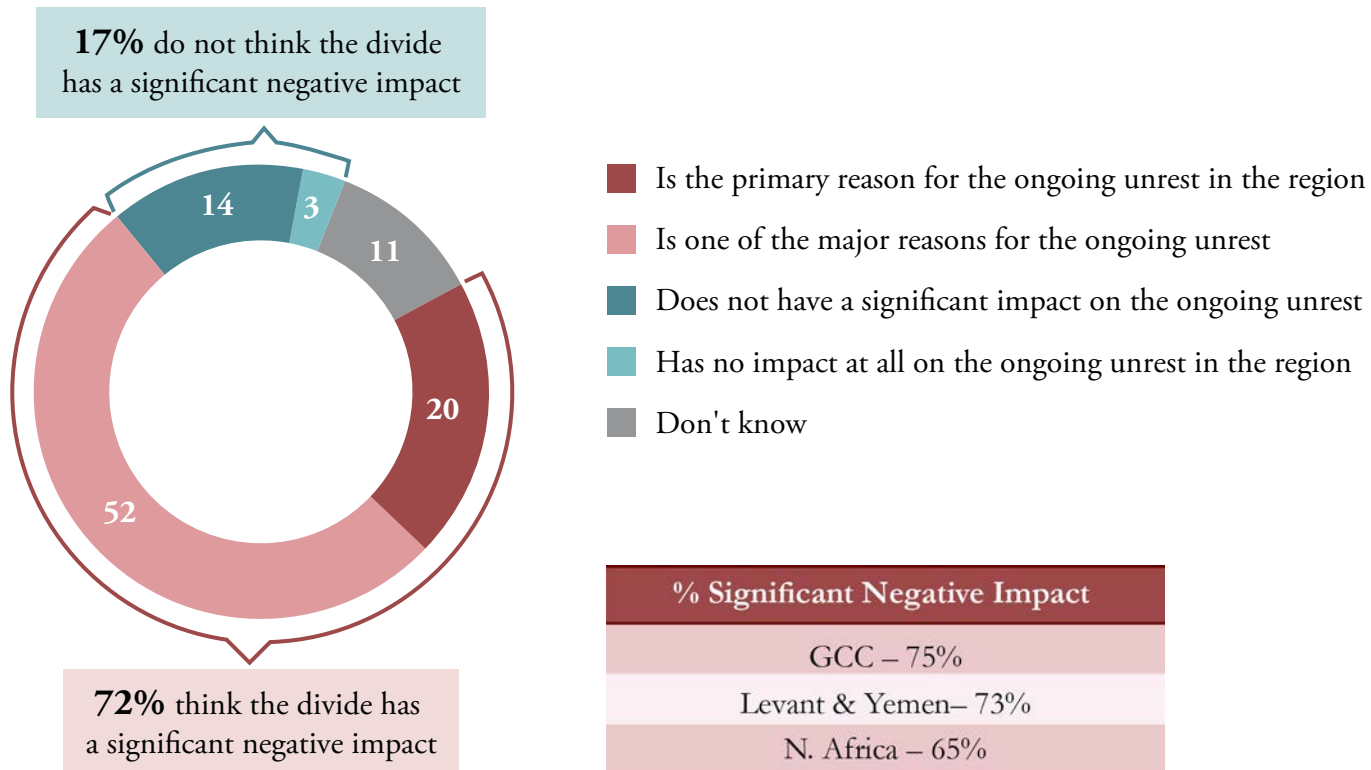
- Worsened
- Stayed about the same
- Improved
- Don't know

Countries Most Likely to Say Worsened  
*(Showing % Worsened)*



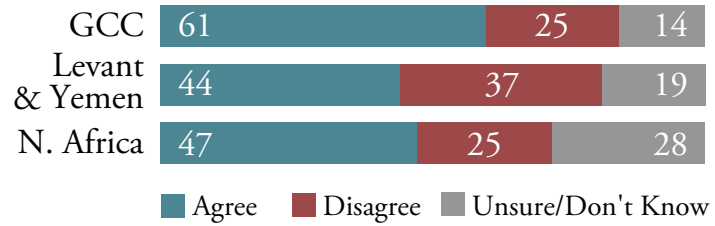
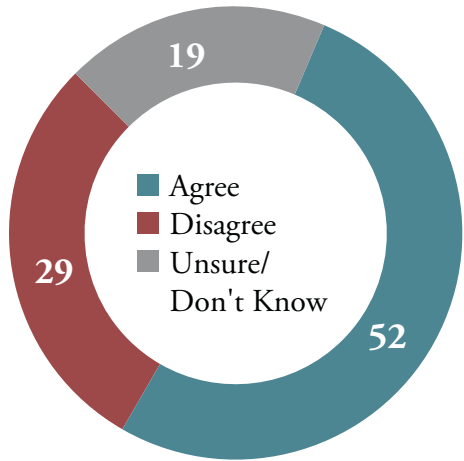
## A COMPELLING MAJORITY OF ARAB YOUTH BELIEVE THE SUNNI-SHIA DIVIDE IS A SIGNIFICANT DRIVER OF UNREST IN THE REGION

Which of the following is closest to your view about the Sunni-Shia divide and the ongoing unrest in the region? The Sunni-Shia divide...



## OVERALL, MORE THAN HALF BELIEVE THAT RELIGION PLAYS TOO BIG OF A ROLE IN THE MIDDLE EAST.

How strongly do you agree or disagree with the statement?  
 “Religion plays too big of a role in the Middle East”





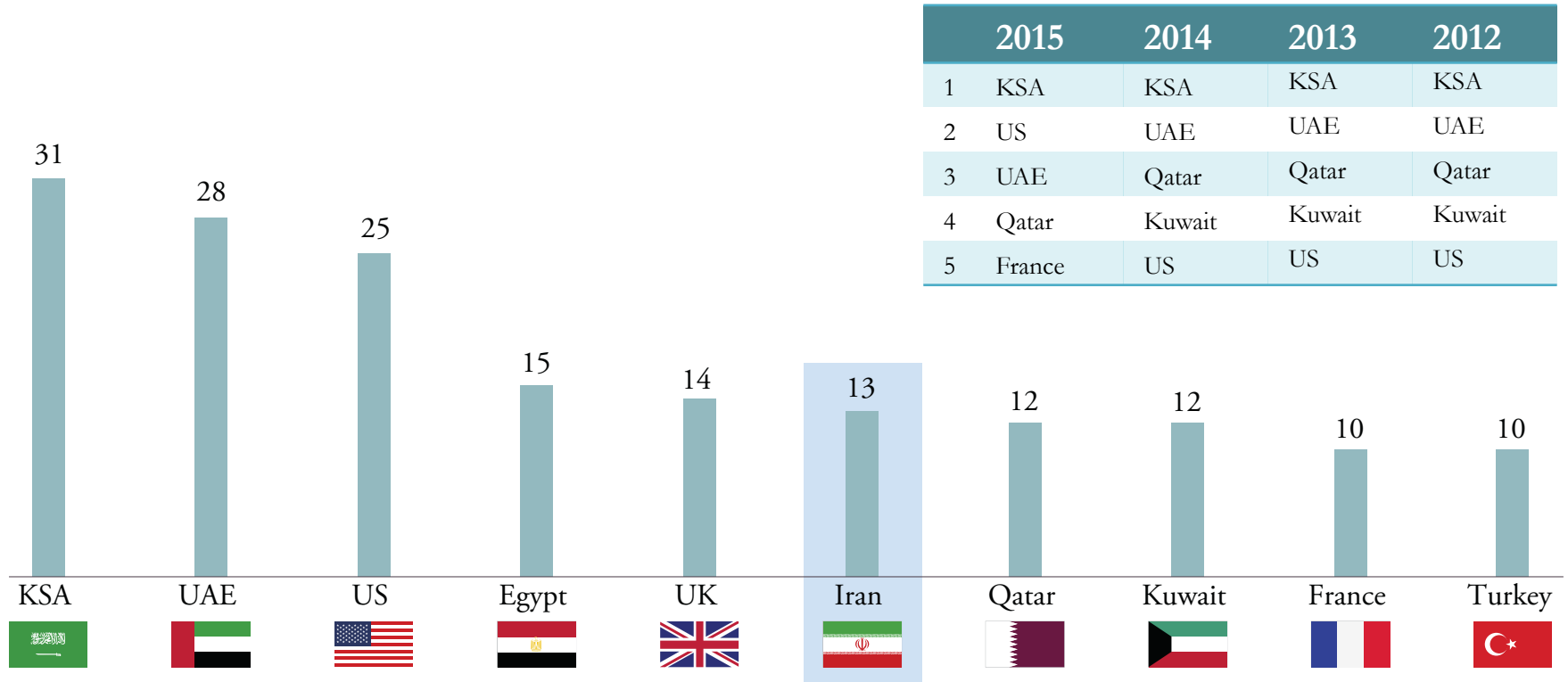
4

**SAUDI ARABIA, UAE AND THE UNITED STATES ARE SEEN AS TOP ALLIES IN THE REGION WHILE IRAN'S INFLUENCE IS ON THE RISE.**



**FOR THE FIFTH YEAR RUNNING, SAUDI ARABIA IS SEEN AS THE TOP ALLY IN THE REGION WHILE IRAN'S INFLUENCE IS ON THE RISE.**

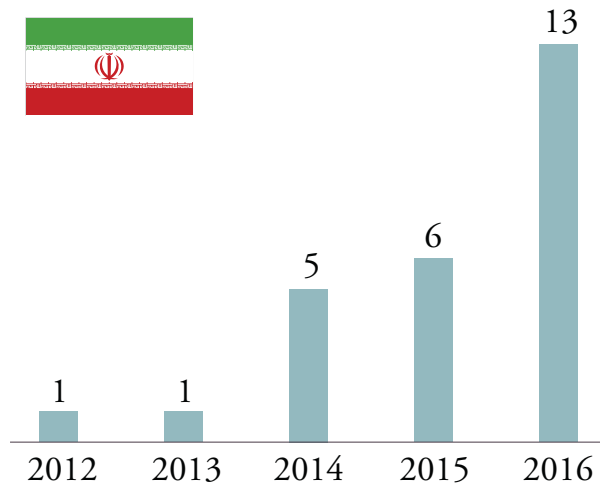
Who would you say is your country's biggest ally?



	2015	2014	2013	2012
1	KSA	KSA	KSA	KSA
2	US	UAE	UAE	UAE
3	UAE	Qatar	Qatar	Qatar
4	Qatar	Kuwait	Kuwait	Kuwait
5	France	US	US	US

**IRAN'S INFLUENCE IS ON THE RISE, PARTICULARLY IN IRAQ, LEBANON AND PALESTINE, WHERE YOUNG ARABS SEE IT AS AN ALLY.**

Who would you say is your country's biggest ally? *(Showing % Iran)*

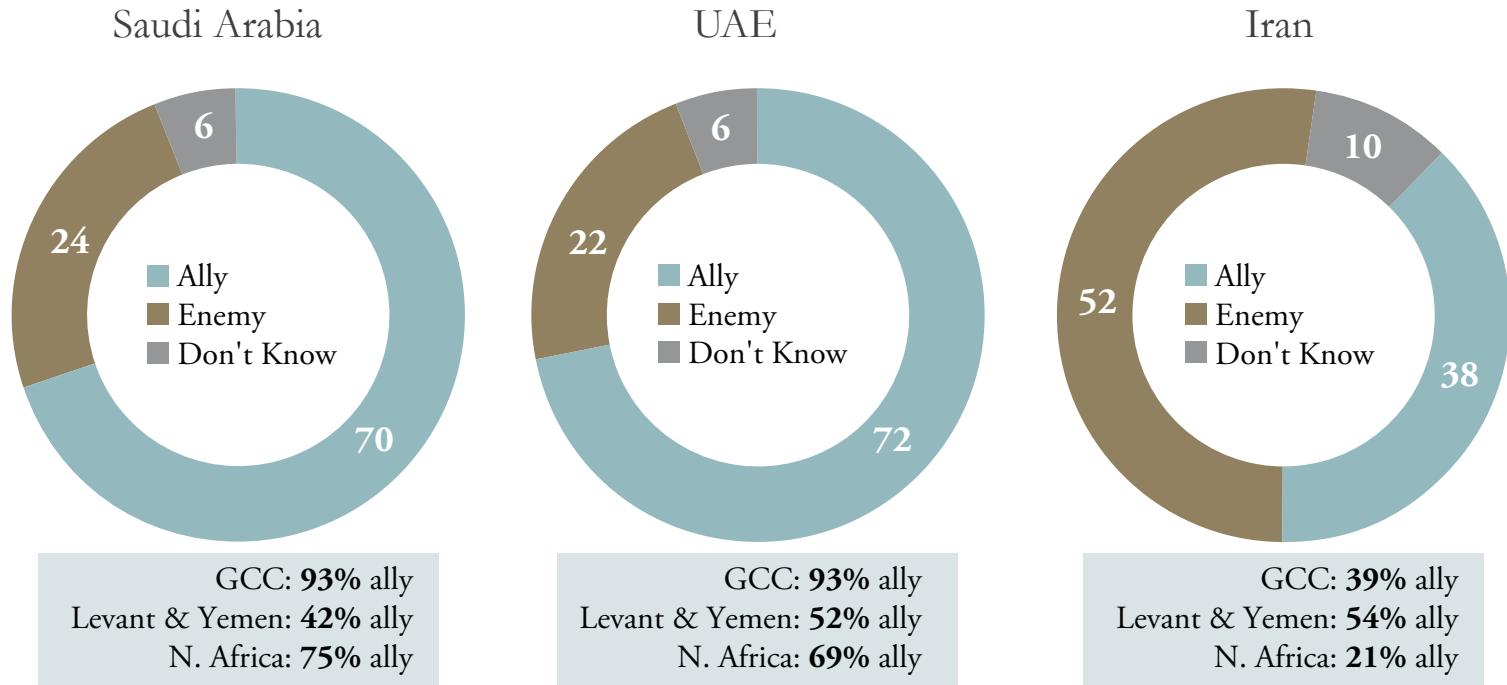


Countries which perceive Iran as an ally



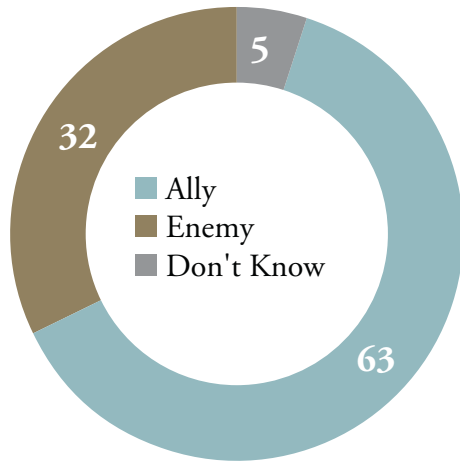
**WHILE A MAJORITY OF YOUNG ARABS VIEW SAUDI ARABIA AND UAE AS ALLIES AND IRAN AS AN ENEMY, YOUNG PEOPLE IN LEVANT ARE MORE LIKELY TO CONSIDER IRAN AN ALLY.**

Do you consider [...] a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of your country?



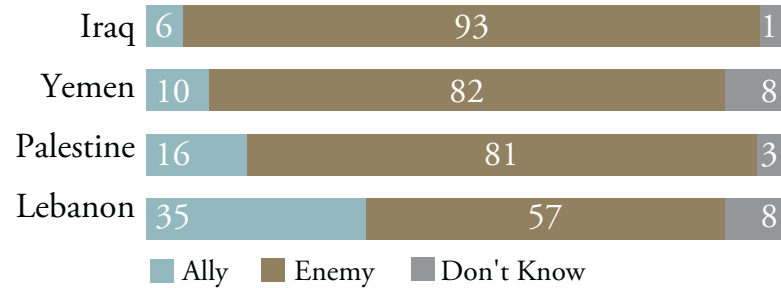
**WHILE THE UNITED STATES' STANDING IN THE REGION IS RELATIVELY STRONG, PARTICULARLY IN THE GCC, THE US IS NOT WELL-LIKED IN THE LEVANT, ESPECIALLY IN IRAQ WHERE MORE THAN 9 IN 10 YOUNG IRAQIS VIEW THE US AS ITS ENEMY.**

Do you consider the United States a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of your country?



GCC: **85%** ally  
 Levant & Yemen: **33%** ally  
 N. Africa: **66%** ally

Countries which Perceive US as an Enemy



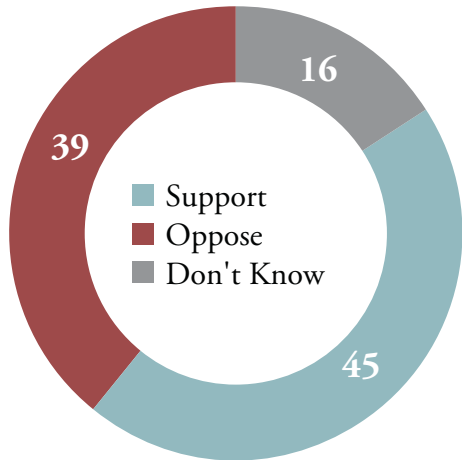


# 5

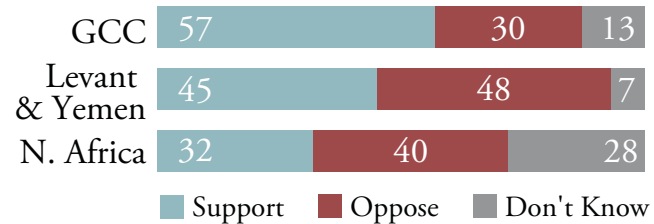
**YOUNG ARABS ARE DIVIDED  
ON THE IRANIAN NUCLEAR DEAL  
AND THE SYRIAN CONFLICT.**

## ACROSS THE REGION, YOUNG ARABS ARE DIVIDED ON THE IRANIAN NUCLEAR DEAL; SUPPORT IS STRONGEST IN OMAN, WHICH PLAYED A SIGNIFICANT ROLE IN BROKERING THE AGREEMENT.

To what extent do you support or oppose the recent agreement between Iran and the international community on Iran's nuclear programme ?

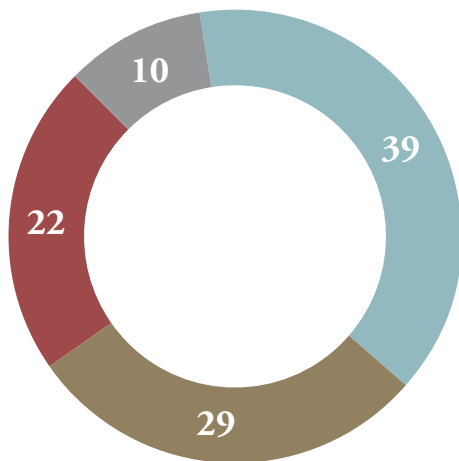


Top support country:  
 Oman – 93% support

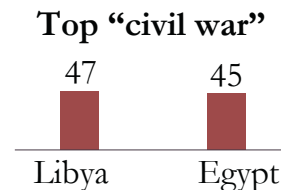
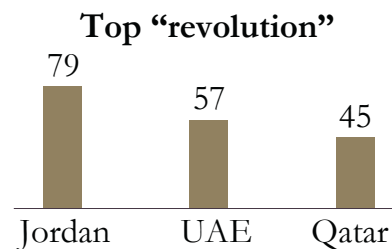
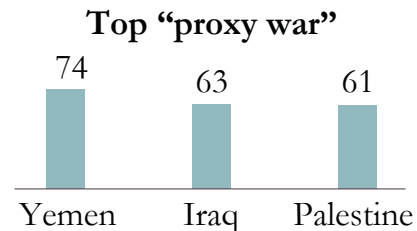


## OPINION IS DIVIDED AMONG ARAB YOUTH ON WHETHER THE SYRIAN CONFLICT IS A PROXY WAR, A REVOLUTION, OR A CIVIL WAR AMONG SYRIANS.

Which of the following is closest to your view?  
 The ongoing conflict in Syria is...



- A proxy war fought by regional and global powers
- A revolution against Bashar Al-Assad's regime
- A civil war among Syrians
- Don't Know





6

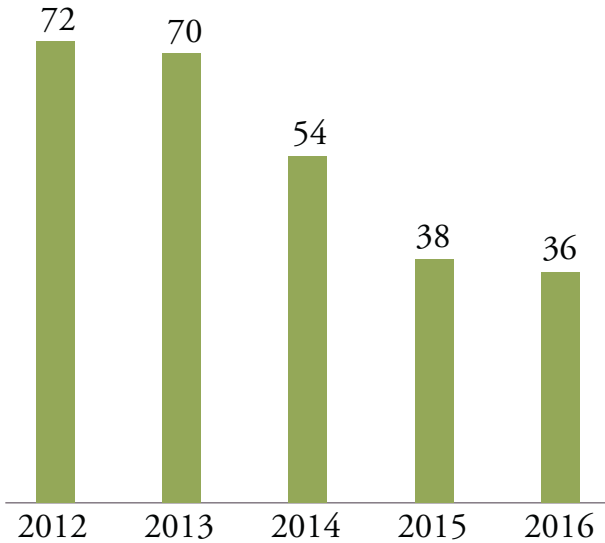
**FIVE YEARS AFTER FIGHTING FOR  
POLITICAL FREEDOM DURING THE  
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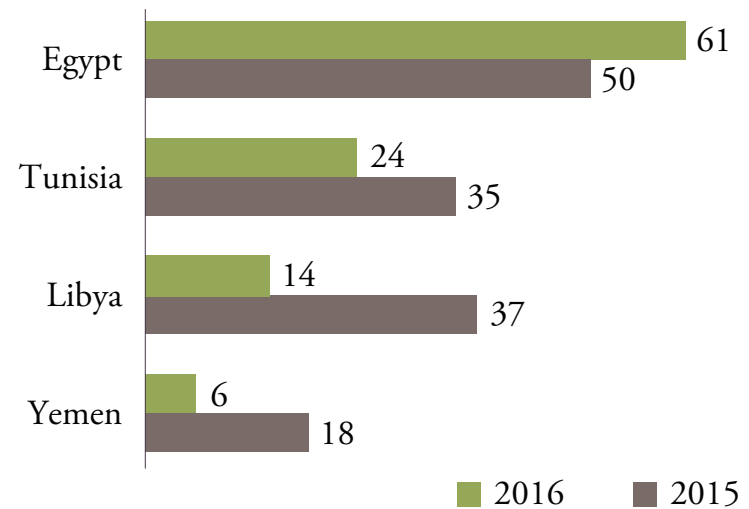
## THE PERCEIVED LEGACY OF THE ARAB SPRING CONTINUES TO DETERIORATE, AND EGYPT IS THE ONLY ARAB SPRING COUNTRY THAT BELIEVES THE ARAB WORLD IS BETTER OFF BECAUSE OF IT.

How strongly do you agree or disagree with the statement?  
**“Following the Arab Spring, I feel the Arab world is better off”**

All Countries  
 Showing % agree



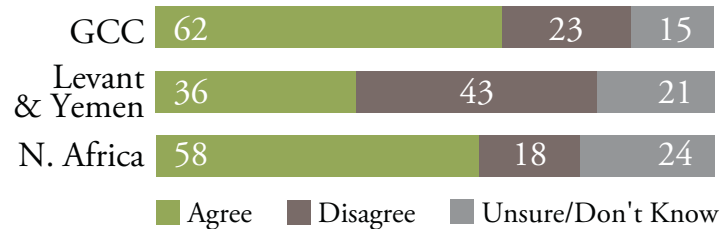
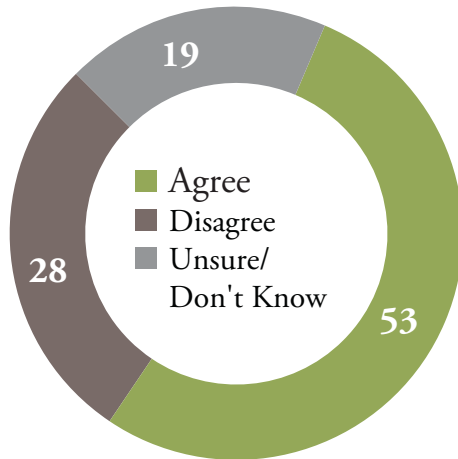
The Four Arab Spring Countries  
 Showing % agree



**WITH THE NUMEROUS ISSUES FACING THE REGION AND THE LEGACY OF THE ARAB SPRING UNCERTAIN, MORE THAN HALF OF YOUNG ARABS TODAY FAVOUR STABILITY OVER DEMOCRACY, THOUGH YOUTH IN LEVANT & YEMEN IS DIVIDED.**

How strongly do you agree or disagree with the statement?

**“Given the current circumstances in the Middle East, promoting stability in the region is more important than promoting democracy”**



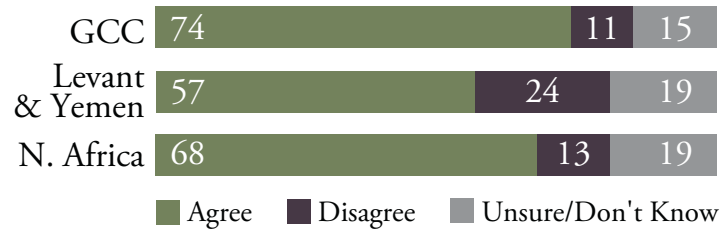
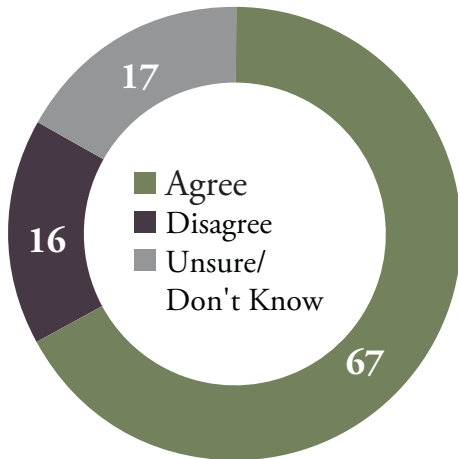


7

**ARAB YOUTH WANT THEIR LEADERS TO DO MORE TO IMPROVE THE PERSONAL FREEDOM AND HUMAN RIGHTS OF CITIZENS, PARTICULARLY WOMEN.**

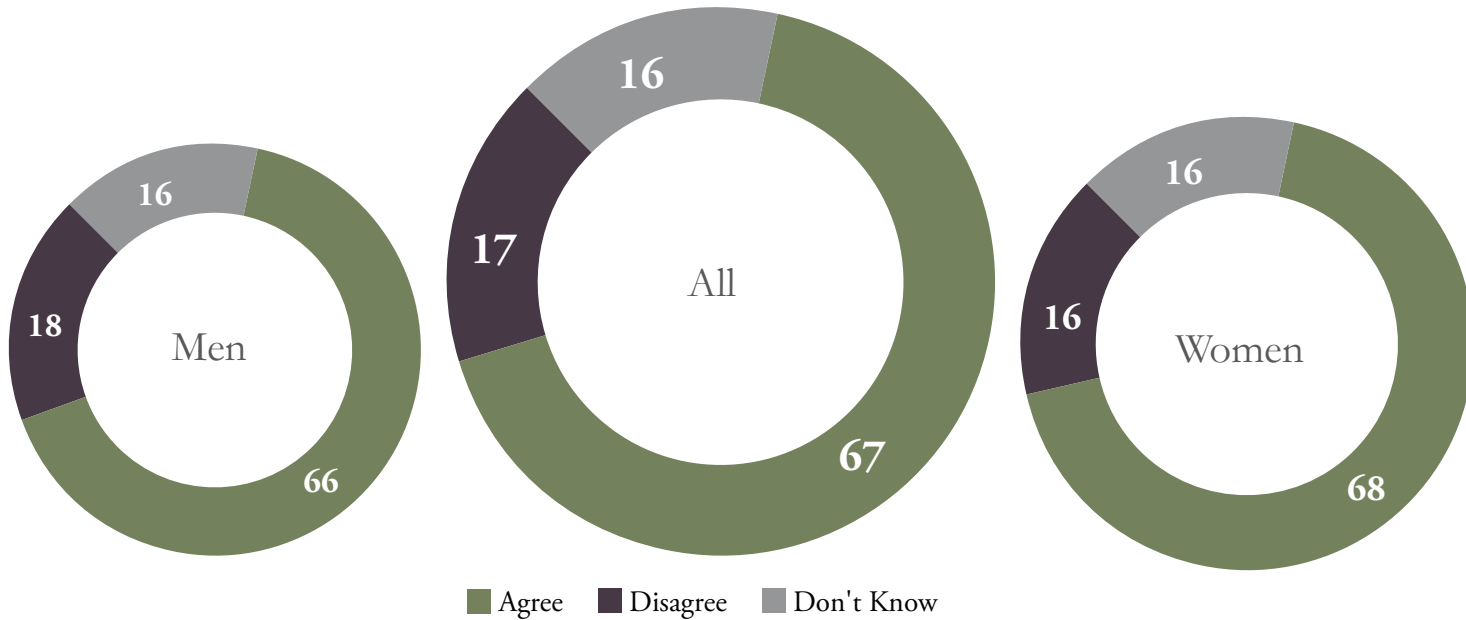
## ARAB YOUTH WANT THEIR LEADERS TO DO MORE TO IMPROVE THEIR PERSONAL FREEDOM AND HUMAN RIGHTS.

How strongly do you agree or disagree with the statement?  
 “The Arab leaders should do more to improve the personal freedom and human rights of their people”



**REGARDLESS OF GENDER, TWO IN THREE YOUNG ARABS BELIEVE THEIR LEADERS SHOULD DO MORE TO ADVANCE THE RIGHTS AND PERSONAL FREEDOM OF WOMEN.**

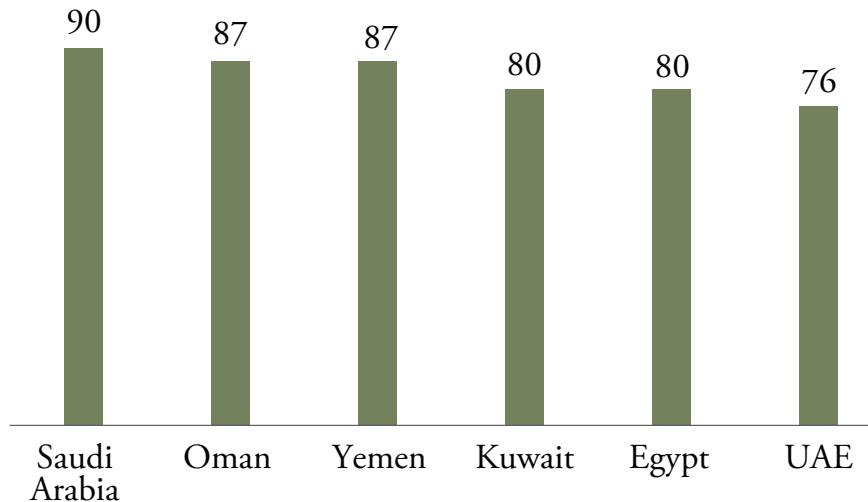
How strongly do you agree or disagree with the statement?  
“The Arab leaders should do more to improve the personal freedom and human rights of women”



## THE DESIRE FOR ARAB LEADERS TO DO MORE ON WOMEN'S RIGHTS AND FREEDOM IS STRONG ACROSS DIFFERENT PARTS OF THE REGION AND HIGHEST IN SAUDI ARABIA.

How strongly do you agree or disagree with the statement?  
“The Arab leaders should do more to improve the personal freedom and human rights of women”

Showing Top 6 Countries with the highest % Agree



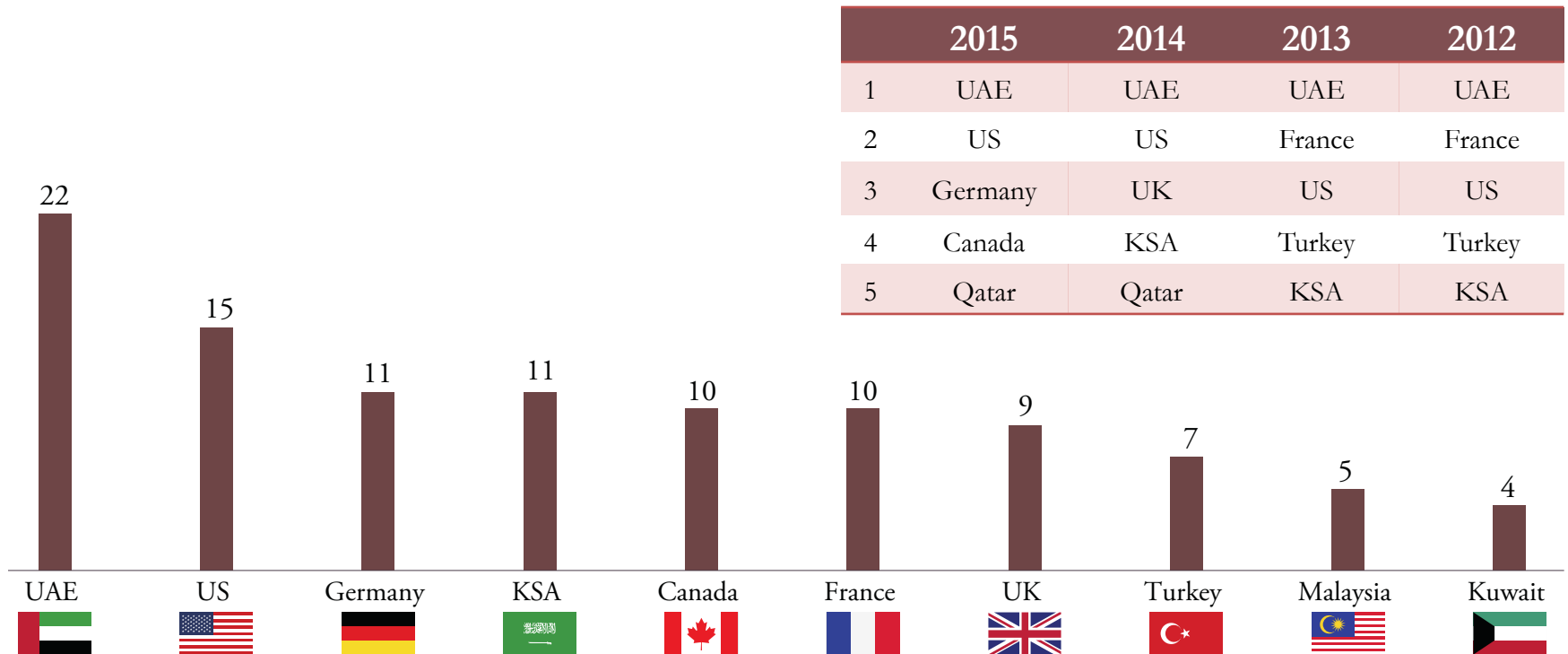


8

**THE UAE IS VIEWED AS A MODEL  
COUNTRY THAT IS ECONOMICALLY  
SECURE, AND IS THE MOST FAVOURED  
NATION TO LIVE IN AND SET UP  
A BUSINESS.**

## FOR THE FIFTH YEAR RUNNING, YOUNG ARABS VIEW THE UAE AS THE TOP COUNTRY TO LIVE IN.

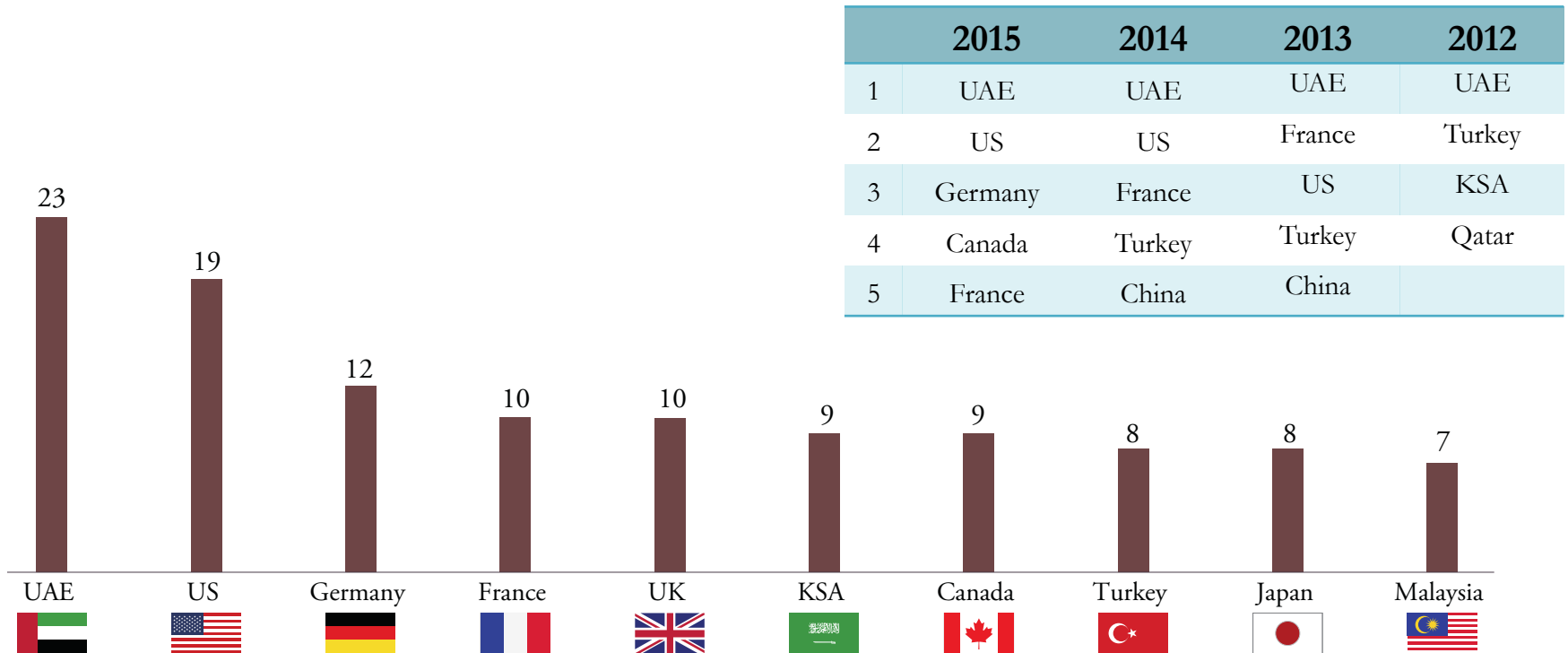
Which country in the world, if any, would you like to live in?





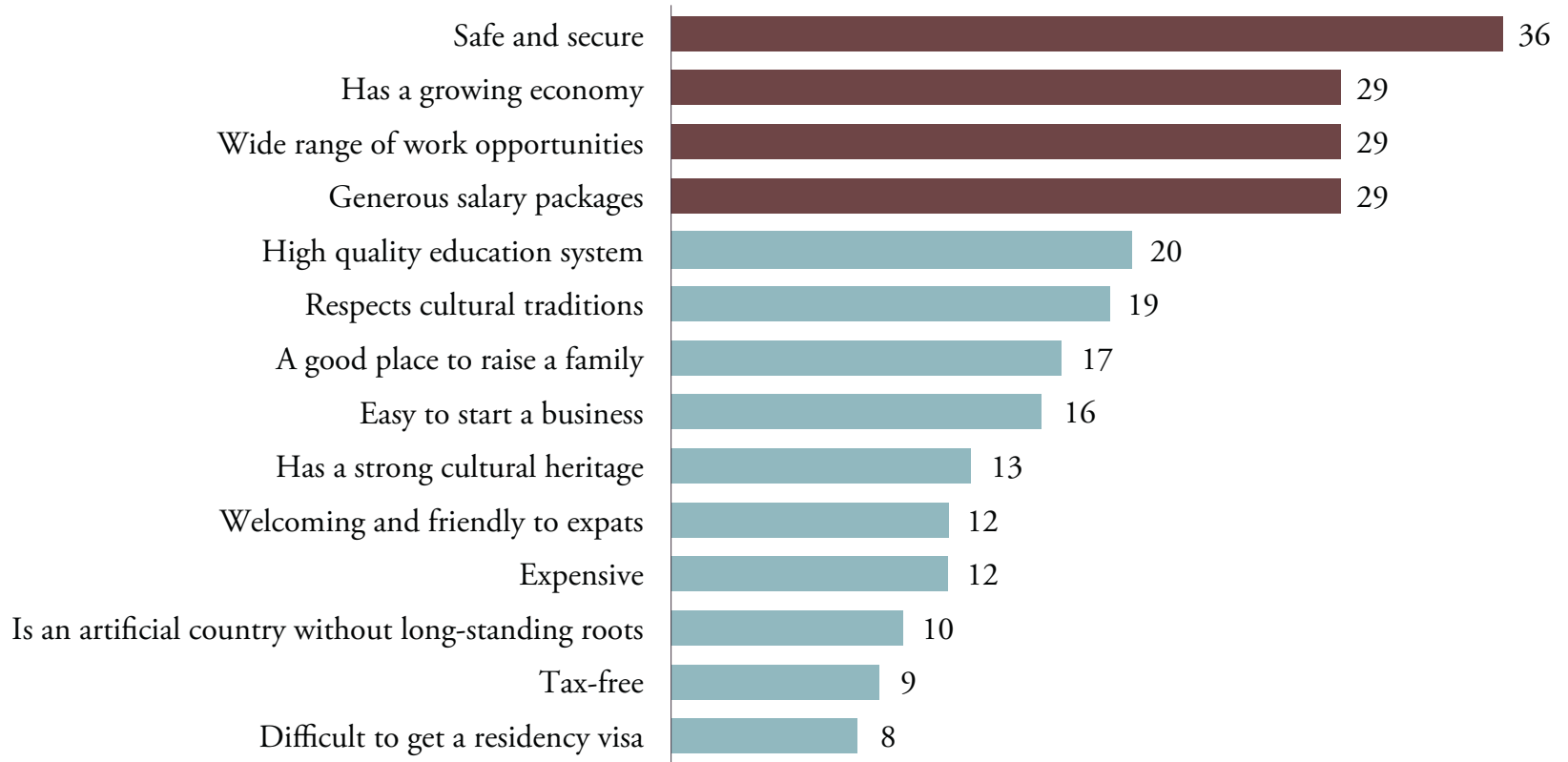
## ARAB YOUTH ALSO CONTINUE TO VIEW THE UAE AS THE TOP COUNTRY FOR THEIR OWN NATIONS TO EMULATE FOR THE FIFTH YEAR.

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



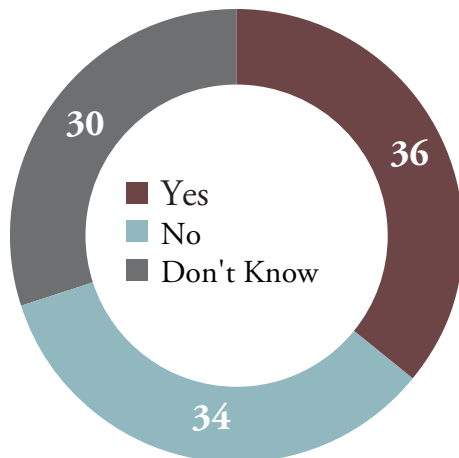
**THE STRENGTH OF THE UAE'S IMAGE AMONG ARAB YOUTH STEMS PRIMARILY FROM THE PERCEPTION OF THE UAE AS A SAFE AND SECURE COUNTRY THAT OFFERS ECONOMIC OPPORTUNITIES.**

Thinking specifically about the United Arab Emirates, which of the following phrases, if any, do you associate most strongly with the UAE? Please select all up to three phrases.

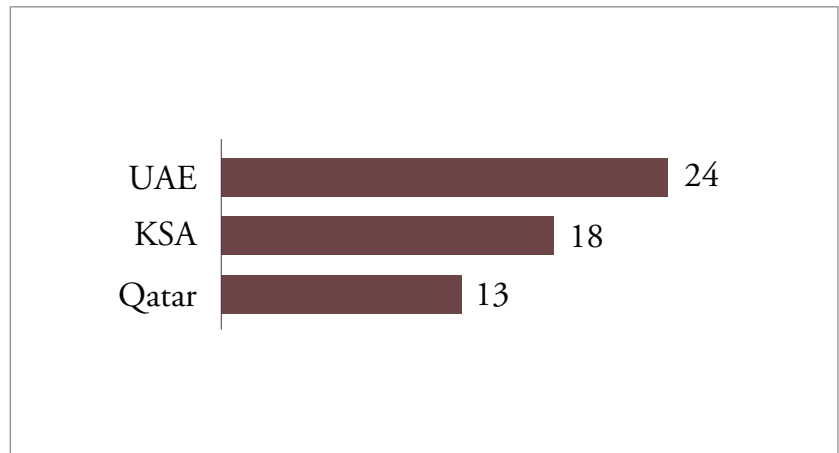


## AMONG POTENTIAL ENTREPRENEURS, THE UAE IS ALSO SEEN AS THE TOP NATION IN THE ARAB WORLD TO START A BUSINESS.

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



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



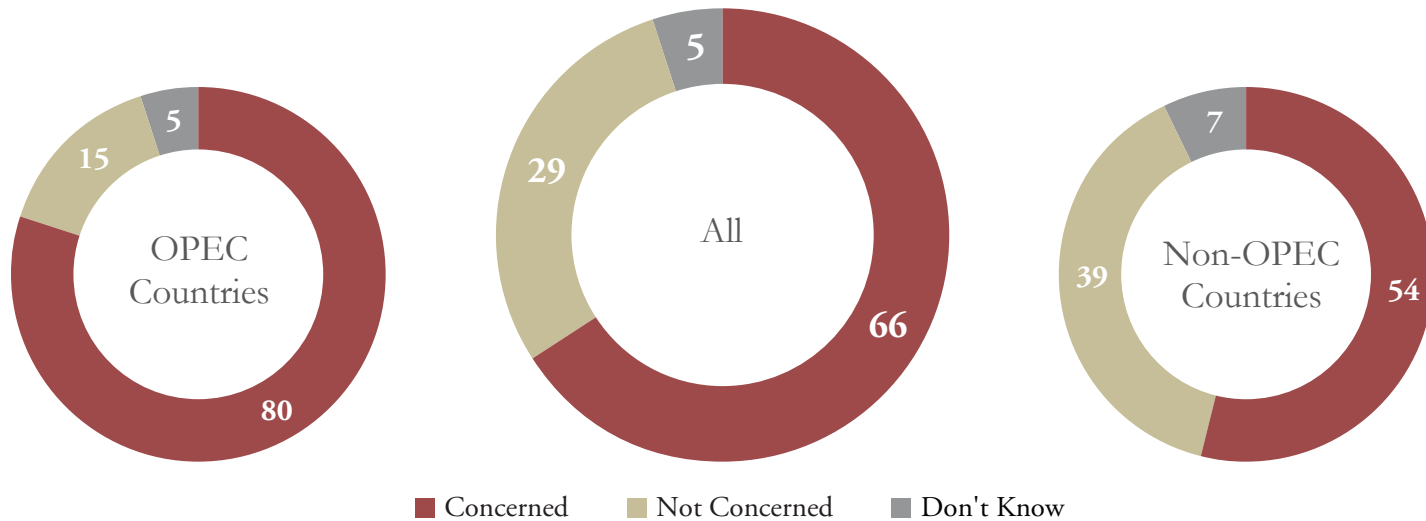


9

**ARAB YOUTH ARE INCREASINGLY CONCERNED ABOUT FALLING OIL PRICES, BUT MOST STILL BELIEVE THEY ARE ENTITLED TO SUBSIDISED ENERGY.**

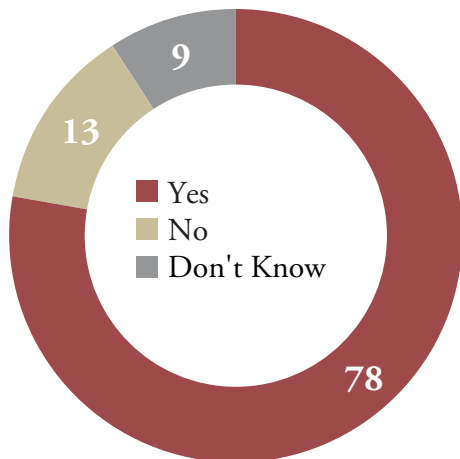
## CONCERN ABOUT FALLING OIL PRICES HAS RISEN SIGNIFICANTLY OVER THE PAST YEAR AND IS PARTICULARLY HIGH AMONG YOUNG ARABS LIVING IN THE OPEC MEMBER STATES.

How concerned are you about falling energy prices?



## NEARLY FOUR IN FIVE BELIEVE THEIR GOVERNMENT SHOULD CONTINUE ENERGY SUBSIDIES — BUT IF THE SUBSIDIES WERE TO BE STOPPED, MANY BELIEVE THE SUBSIDIES SHOULD BE REMOVED FOR EXPATS ONLY.

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



If your government were to stop subsidising energy, electricity and transport fuel, do you think the subsidies should be removed for...

**49%**

Only for expatriates

**37%**

Both for nationals  
and expatriates



# 10

**MORE YOUNG ARABS GET THEIR  
DAILY NEWS ONLINE THAN FROM  
TV OR PRINT MEDIA.**

**ON A DAILY BASIS, MORE YOUNG ARABS GET THEIR NEWS ONLINE THAN FROM TV OR PRINT MEDIA.**

**32%**

read news online daily



**29%**

watch TV news channels daily



**7%**

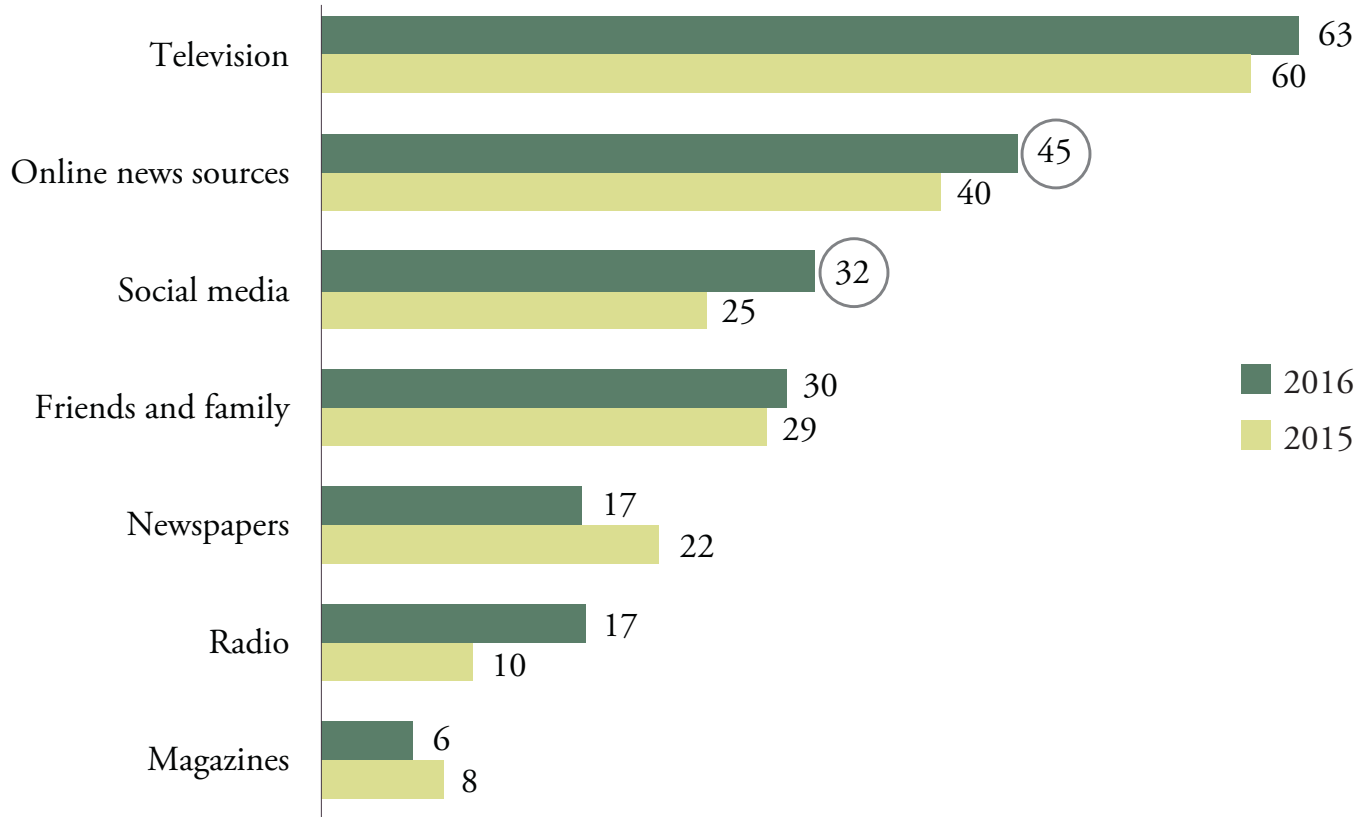
read newspapers daily





**OVERALL, TV STILL HAS THE LARGEST NEWS REACH AMONG YOUNG ARABS, BUT ONLINE AND SOCIAL MEDIA CONTINUE CLOSING THE GAP, PRIMARILY AT THE EXPENSE OF PRINT MEDIA.**

Where do you get your news?



**WHATSAPP IS THE NUMBER ONE SOCIAL PLATFORM USED ON A DAILY BASIS, WHILE MORE THAN HALF SHARE INTERESTING NEWS ARTICLES ON FACEBOOK.**

Young Arabs use on a daily basis...

WhatsApp



62%

Facebook



55%

Youtube



33%

Twitter



28%

Instagram



28%



**52%**  
say they use Facebook to share interesting news  
articles they read, up from  
**41% in 2015**



1

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# INSIDE THE HEARTS AND MINDS OF ARAB YOUTH

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## Thank you

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