

11TH ANNUAL ASDA'A BCW ARAB YOUTH SURVEY 2019

A CALL FOR REFORM

About the 2019 Arab Youth Survey



The ASDA'A BCW Arab Youth Survey, launched in 2008, is the largest survey of its kind of the Middle East's largest demographic – its youth. It provides governments, the private sector and civil society with insights into the hopes, concerns and aspirations of Arab youth. For the 11th annual ASDA'A BCW Arab Youth Survey 2019, PSB, an international research firm, conducted a study with the following parameters:

- 3,300 face-to-face interviews
- Arab youth in the age group of 18-24 years
- Country nationals only
- Sample split 50:50 male/female
- 15 Arab states:
 - GCC: Bahrain, Kuwait, Oman, Saudi Arabia, and the UAE
 - North Africa: Algeria, Egypt, Libya, Morocco, and Tunisia
 - Levant & Other: Jordan, Iraq, Lebanon, Palestinian Territories, Yemen

Methodology



3,300 face-to-face interviews were conducted from January 6th to 29th, 2019 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 are below:

UAE	Oman	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon	Iraq	Tunisia	Libya	Algeria	Morocco	Yemen	Palestinian Territories
N=300	N=200	N=200	N=300	N=200	N=300	N=200	N=200	N=250	N=200	N=200	N=200	N=200	N=200	N=150
Dubai (40%) Sharjah (20%) Abu Dhabi (40%)	Muscat (50%) Batinah (50%)	Manama (100%)	Jeddah (40%) Riyadh (40%) Dammam (20%)	Kuwait City (20%) Al Hawalli (30%) Al Ahmadi (20%) Al Farwaniya (30%)	Cairo (50%) Alexandria (25%) Mansoura (25%)	Amman (50%) Irbid (25%) Zarqa (25%)	Saida (20%) Beirut (60%) Tripoli (20%)	Baghdad (50%) Irbil (25%) Basrah (25%)	Tunis (50%) Safaqis (25%) Susah (25%)	Tripoli (65%) Benghazi (35%)	Algiers (50%) Oran (25%) Constantine (25%)	Casablanca (25%) Fes (25%) Rabat (25%) Marrakech (25%)	Sannaa (50%) Al Hudaydah (25%) Ta'izz (25%)	Gaza (50%) West Bank (50%)

Syria and Qatar were not included in the 2019 sample



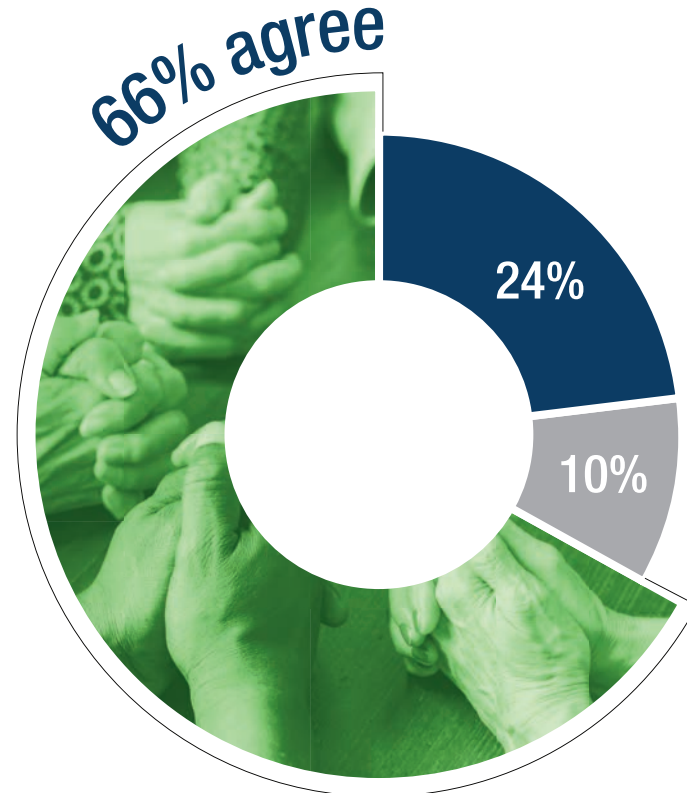
RELIGION

Young Arabs say religion plays too big of a role in the Middle East and religious institutions need to be reformed

Young Arabs say religion plays too big of a role in the Middle East and religious institutions need to be reformed

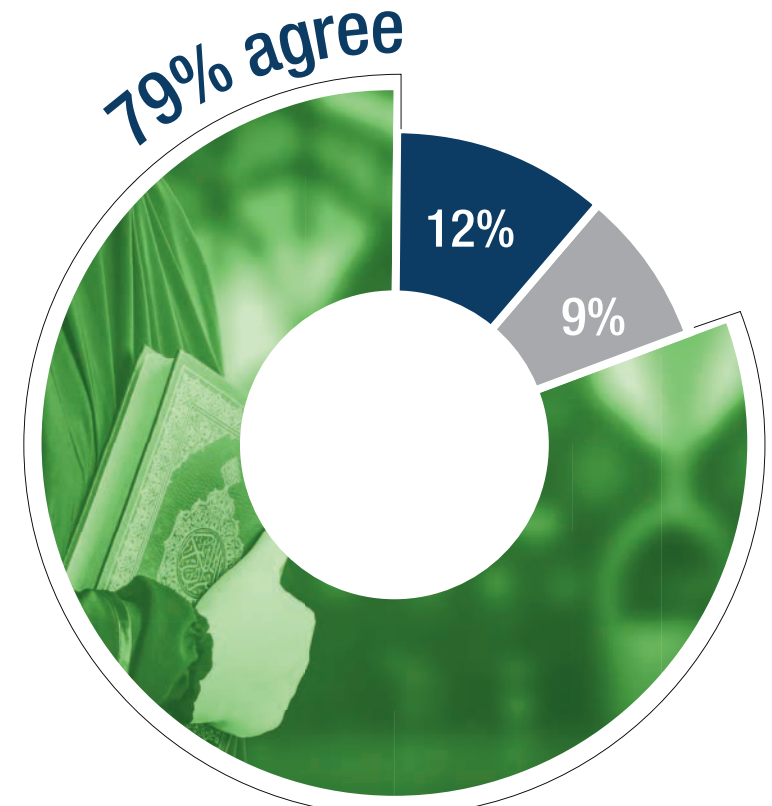
How strongly do you agree or disagree with the following statement?

“Religion plays too big of a role in the Middle East”



- Agree
- Disagree
- Don't know

“The Arab world needs to reform its religious institutions”

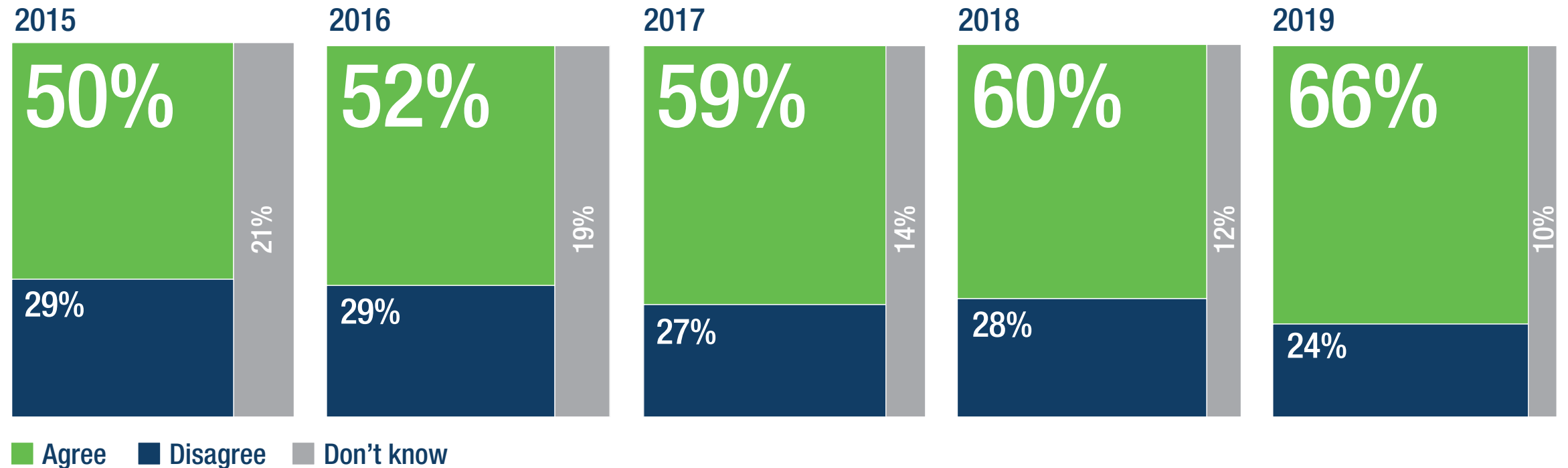


Perception that religion is too influential in the region is on the rise



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

“Religion plays too big of a role in the Middle East”



Half of young Arabs say religious values are holding the region back

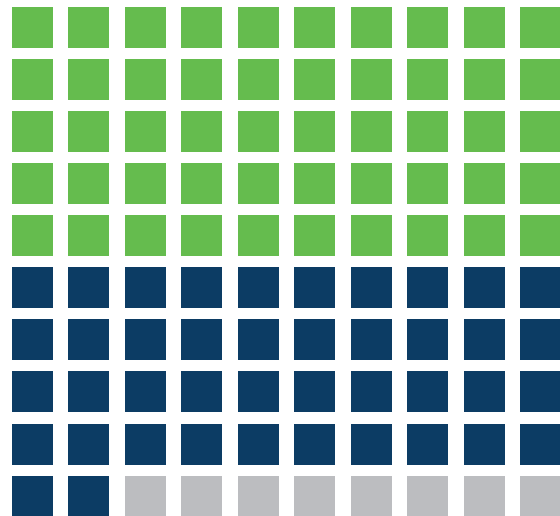


How strongly do you agree or disagree with the following statement?

“Arab world’s religious values are holding the Arab world back”

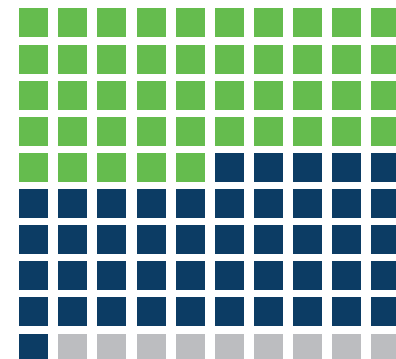
All respondents

50%



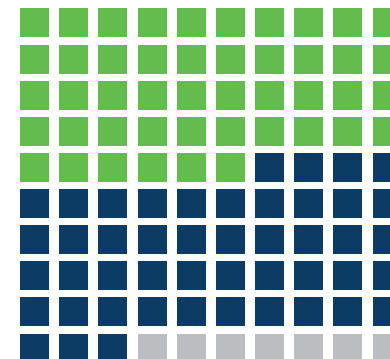
GCC

45%



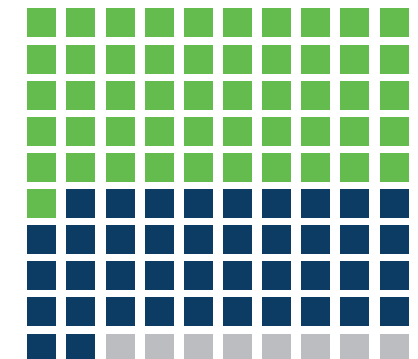
North Africa

46%



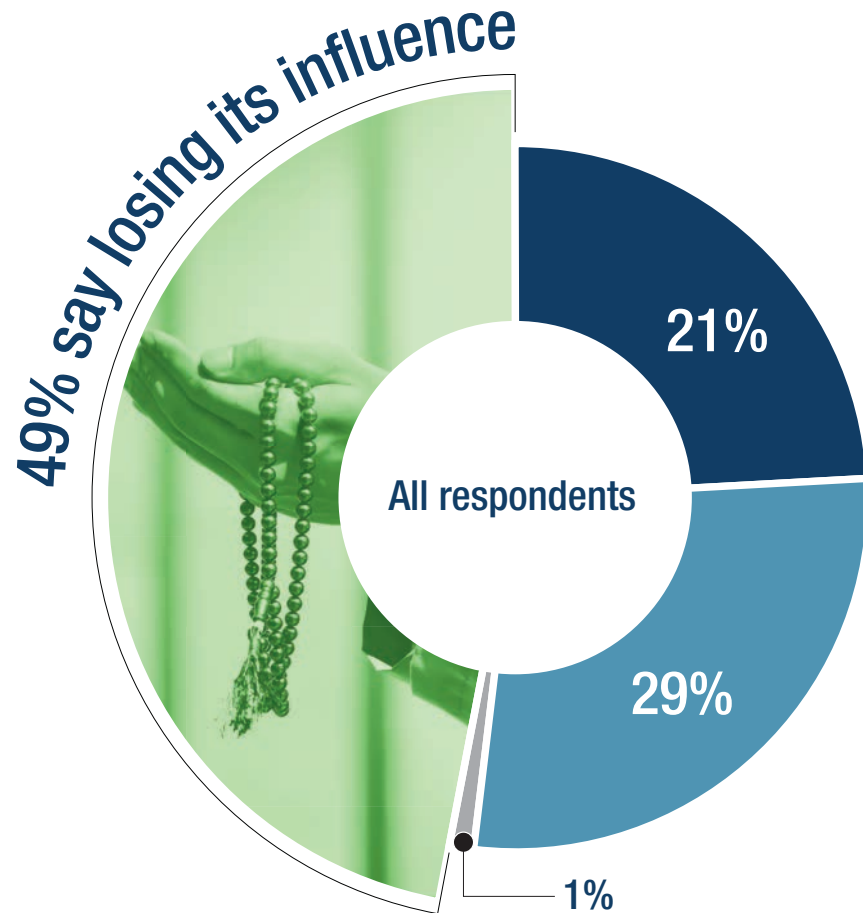
Levant

61%

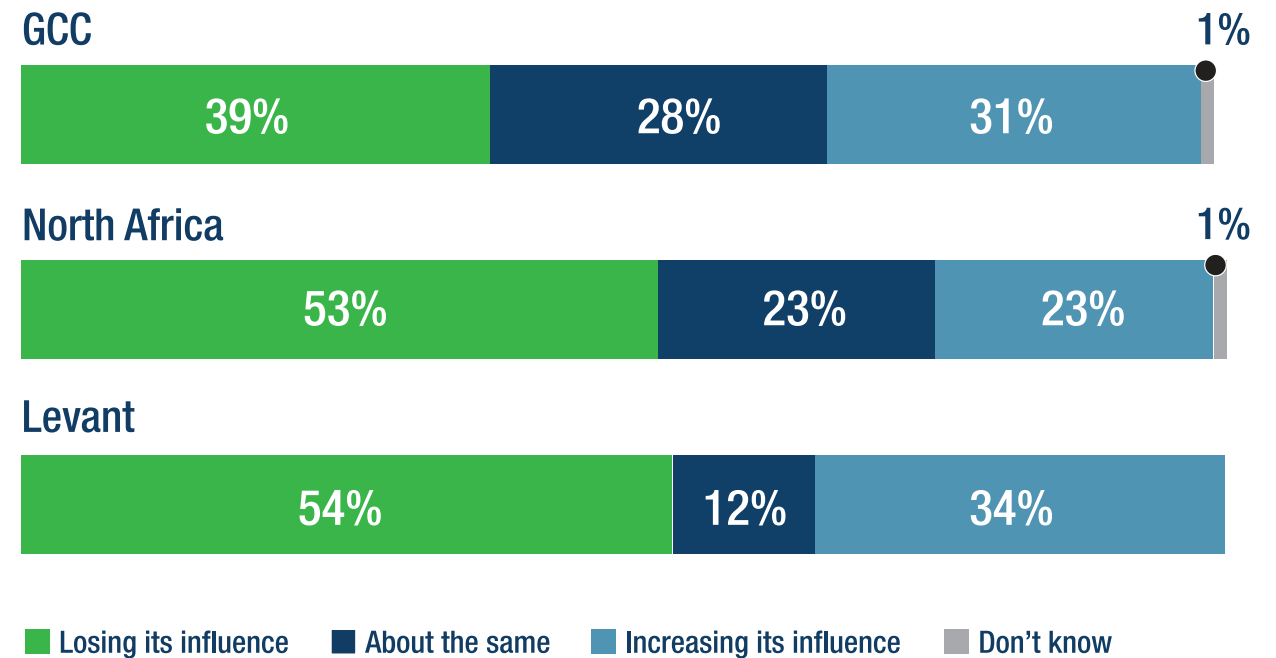


Agree Disagree Don't know

At the same time, many say religion is losing its influence, particularly outside the GCC countries



Do you think religion is increasing its influence on the Arab world or losing its influence?





GOVERNMENT ROLE

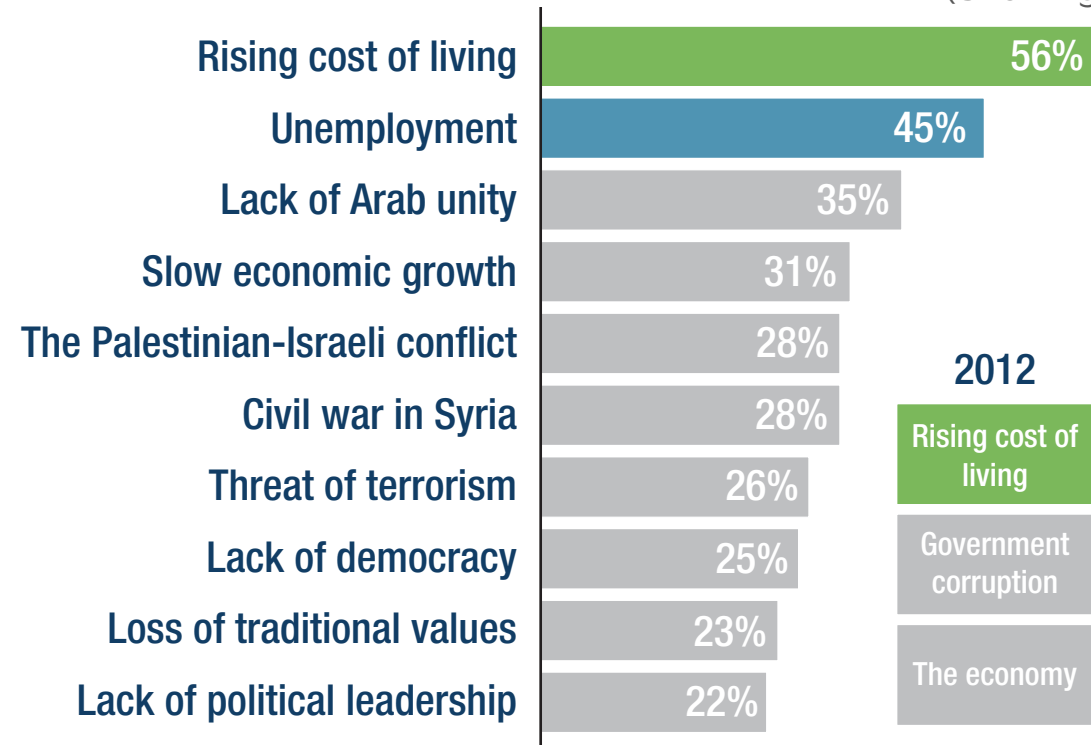
As the region faces economic concerns, Arab youth feel entitled to government support

Economic issues, namely rising cost of living and unemployment, are the dominant concerns among young Arabs



Now thinking about the Middle East, what do you believe are the biggest obstacles facing the Middle East?

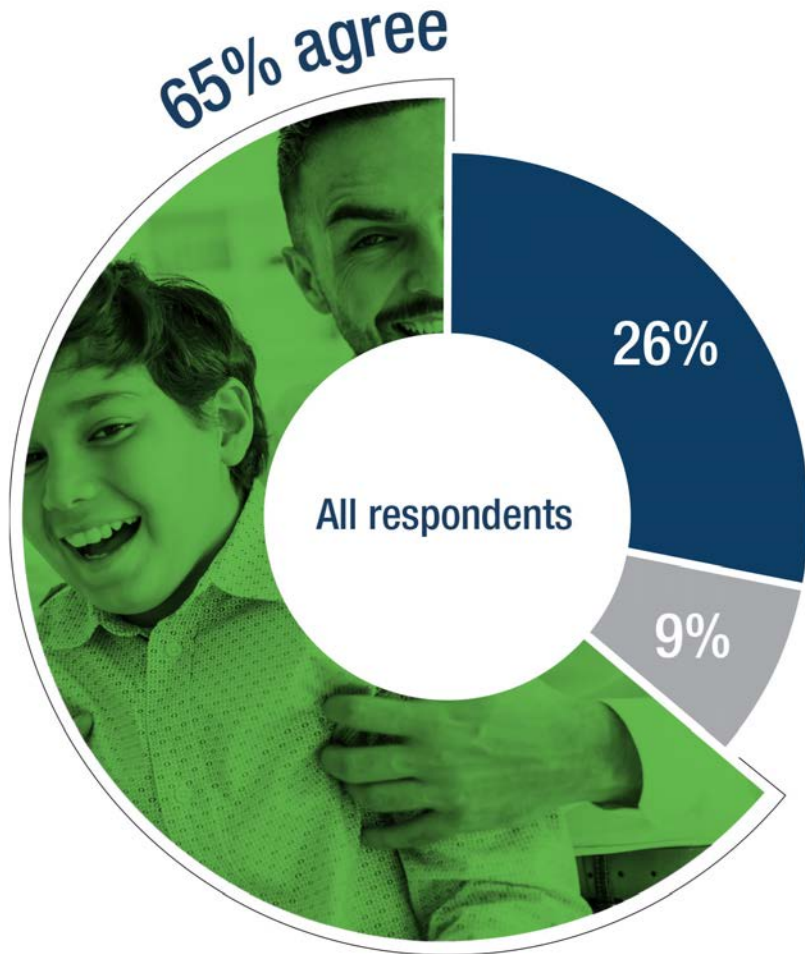
(Showing top 10 obstacles)



Top three concerns facing the Middle East

	2012	2013	2014	2015	2016	2017	2018
	Rising cost of living	Rising cost of living	Civil unrest	Rise of Daesh	Rise of Daesh	Rise of Daesh	Rising cost of living
	Government corruption	Government corruption	Lack of democracy	Threat of terrorism	Threat of terrorism	Unemployment	Unemployment
	The economy	The economy	Weak political leadership	Unemployment	Unemployment	Threat of terrorism	Threat of terrorism

Two in three say their countries are not doing enough to help young families



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

“My country is not doing enough to help young families”
GCC



North Africa



Levant

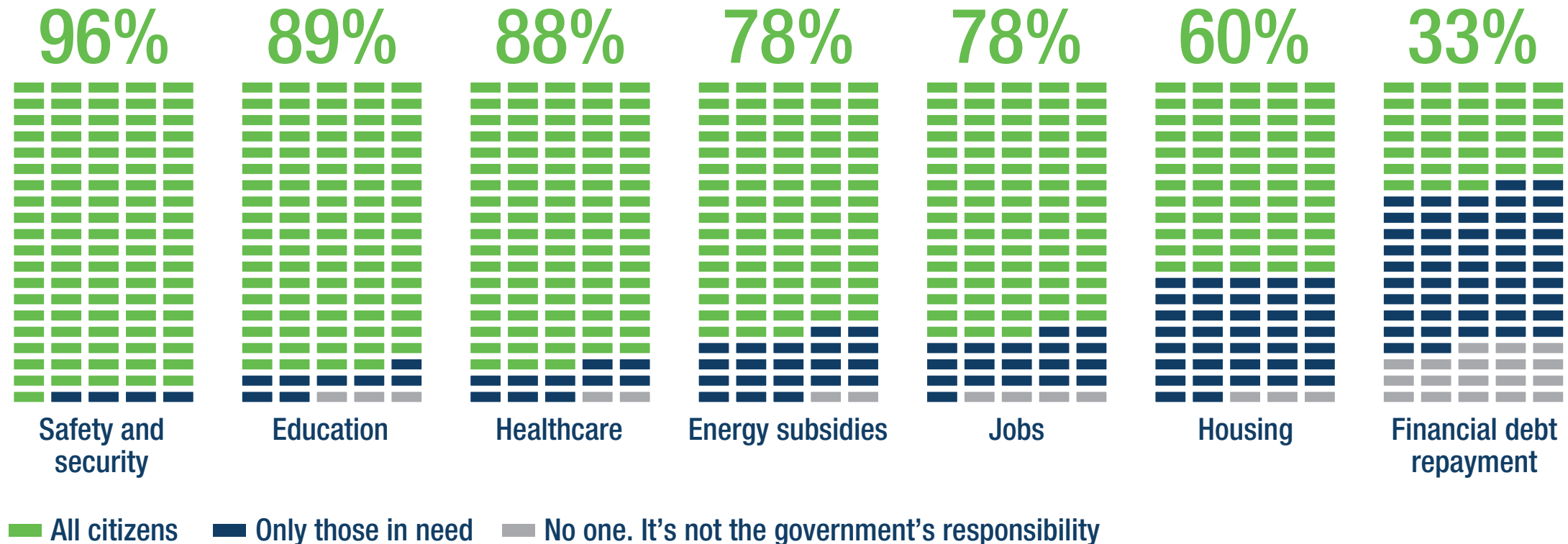


■ Agree ■ Disagree ■ Don't know

A majority of Arab youth say it is the government's responsibility to provide safety, education, healthcare, energy subsidies, jobs, and housing to all citizens



It should be the government's responsibility to provide _____ to...?

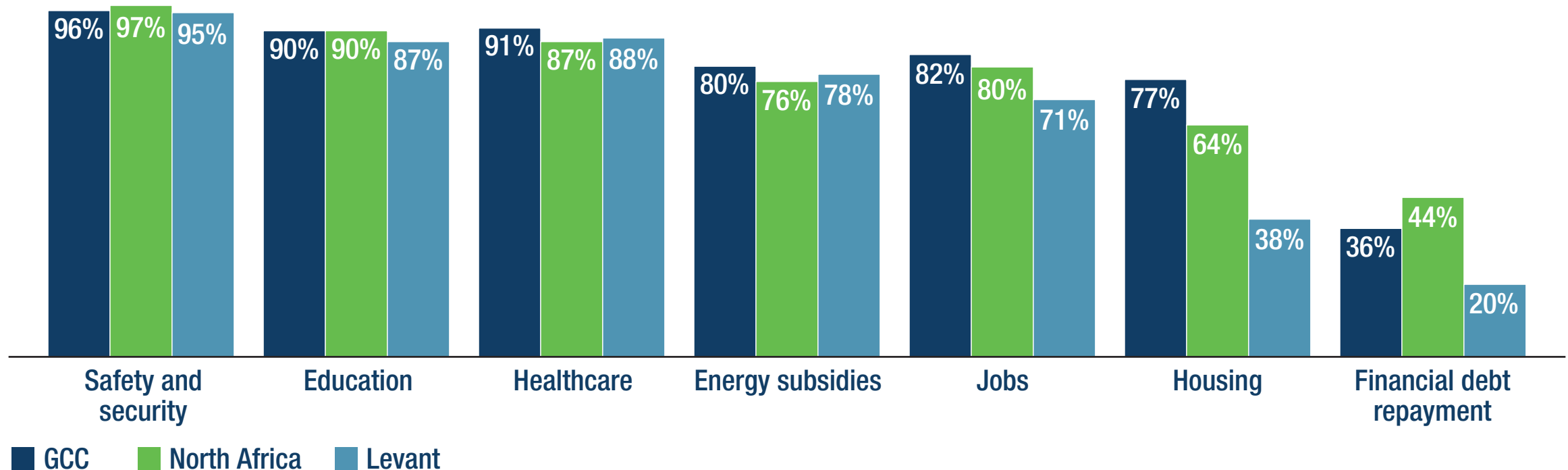


Arab youth throughout the region have high expectations of what governments should provide



It should be the government's responsibility to provide _____ to all its citizens?

(Ranked by 'all')





EDUCATION

Three in four young Arabs are unhappy with the quality of education in their country, and more than half would choose to pursue higher education in the West

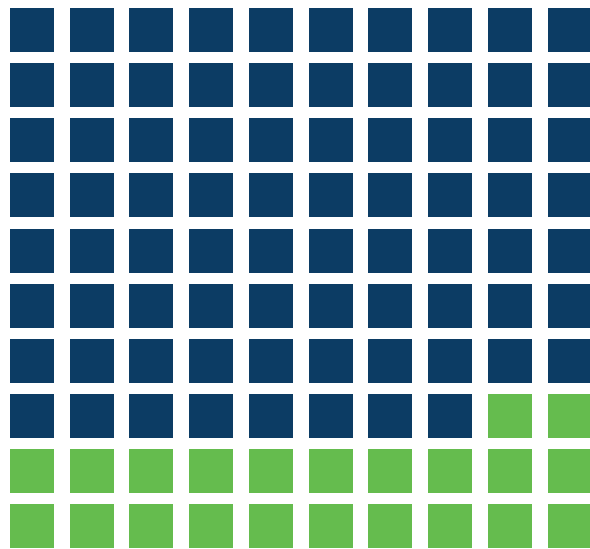
The majority of young Arabs across the region are concerned about the quality of education they receive in their country



How concerned would you say you are about the quality of education?

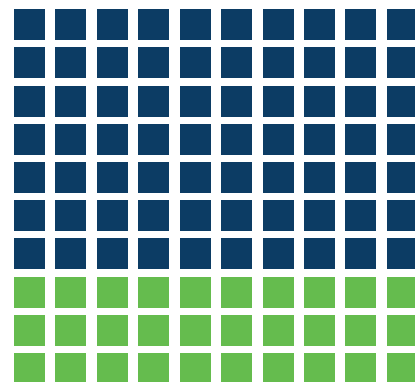
All respondents

78%



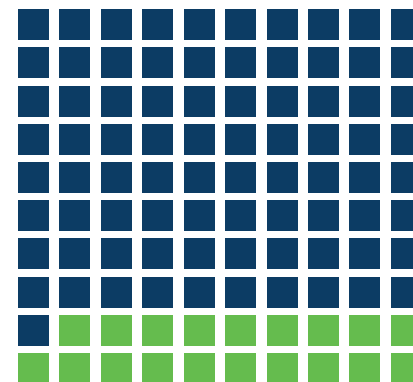
GCC

70%



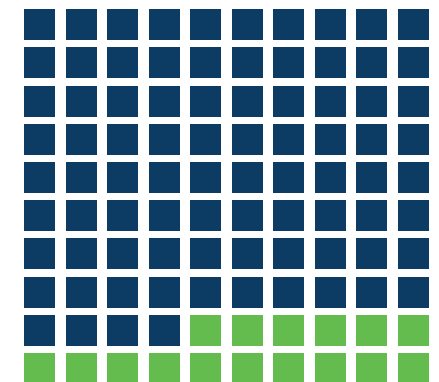
North Africa

81%



Levant

84%



■ Concerned ■ Unconcerned

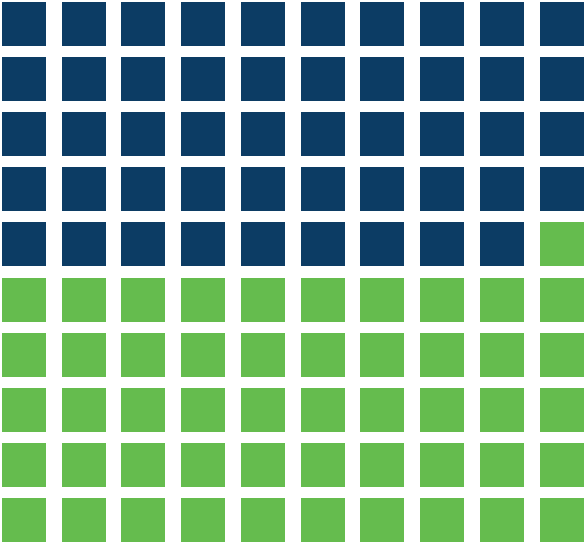
Many young Arabs, especially in the Levant, feel their country's education system does not prepare them for the jobs of the future



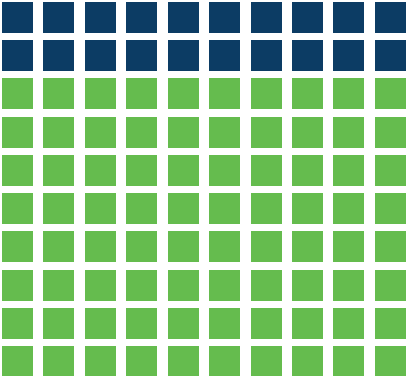
Thinking about education, how satisfied are you with the preparation of students for the jobs of the future?

All respondents

49%



GCC
20%



North Africa
53%

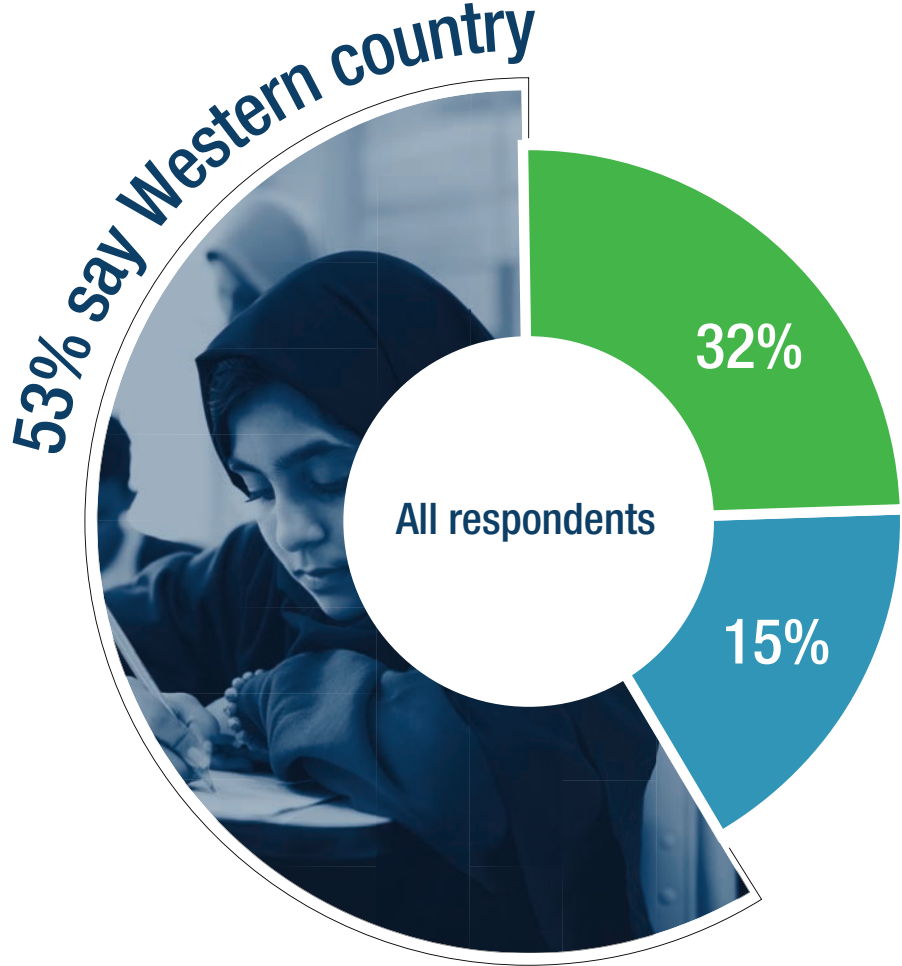
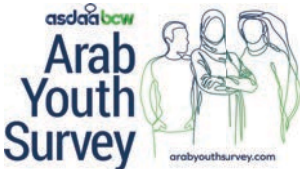


Levant
73%

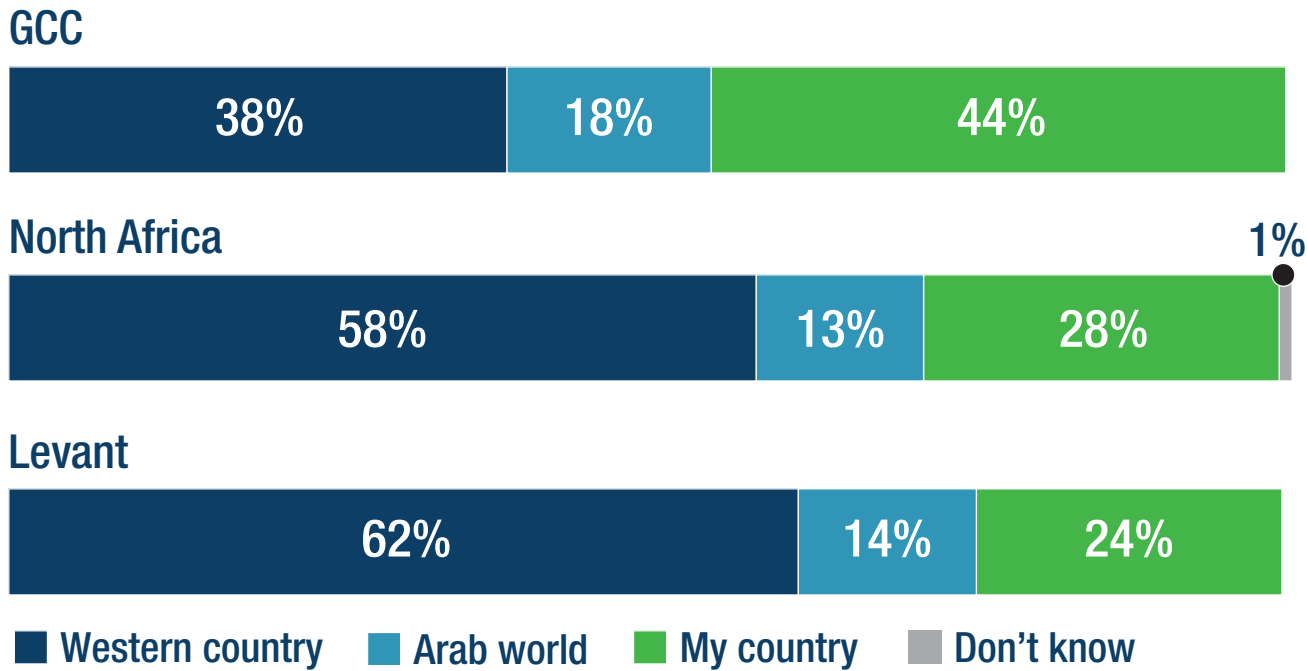


■ Unsatisfied ■ Satisfied

Merely one in three young Arabs would prefer to pursue higher education in their own country, with most wanting to attend college or university in the West



If you were to further your education, where would you prefer to pursue higher education?



4

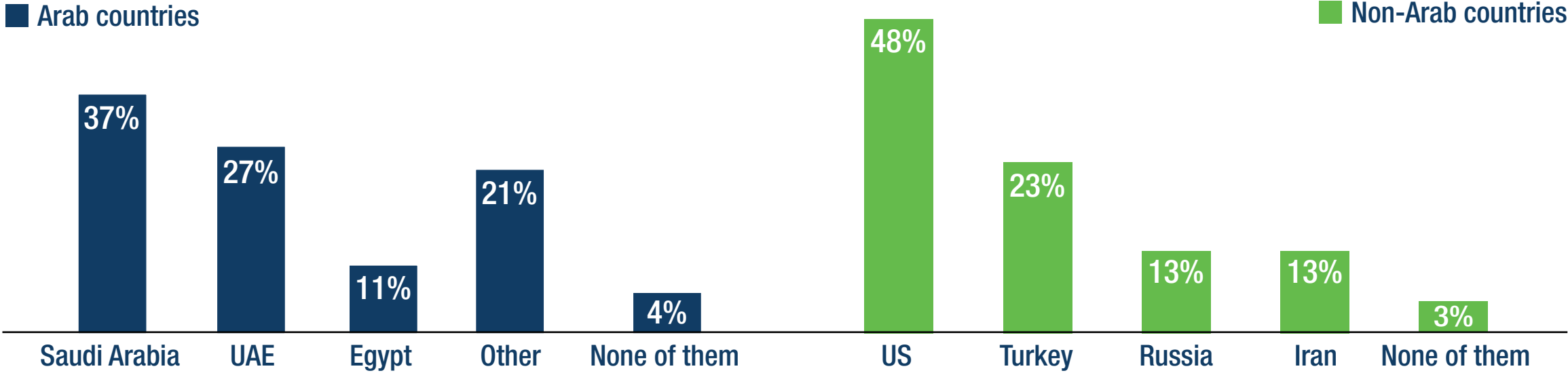
FOREIGN RELATIONS

Arab youth view Saudi Arabia and the US as the two nations increasing their influence most in the Arab world

Saudi Arabia and the US are seen as increasing their influence on the Arab world more than any other countries

Which of the following [Arab] countries has increased its influence on the Arab world the most over the past five years? Please answer this question regardless whether you consider these countries as allies or enemies of your country.

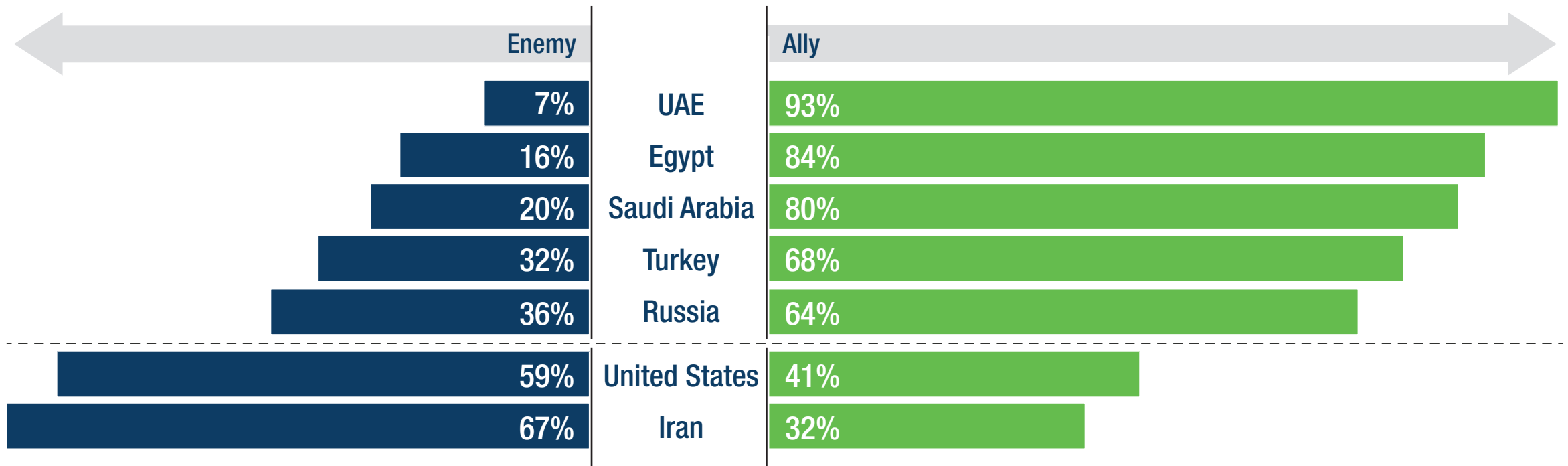
Which of the following [non-Arab] countries has increased its influence on the Arab world the most over the past five years? Please answer this question regardless whether you consider these countries as allies or enemies of your country.



While most view Saudi Arabia and other Arab countries as allies, perceptions of US are nearly as polarising as perceptions of Iran



Do you consider _____ a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of your country?



A majority of young Arabs say the death of Jamal Khashoggi will have no long-term negative impact on Saudi Arabia's image abroad



How much of a negative impact, if any, do you think the killing of Jamal Khashoggi will have on how...

(Showing % among all respondents)

Saudi Arabia is perceived internationally



Saudi Arabia is perceived in the Arab world

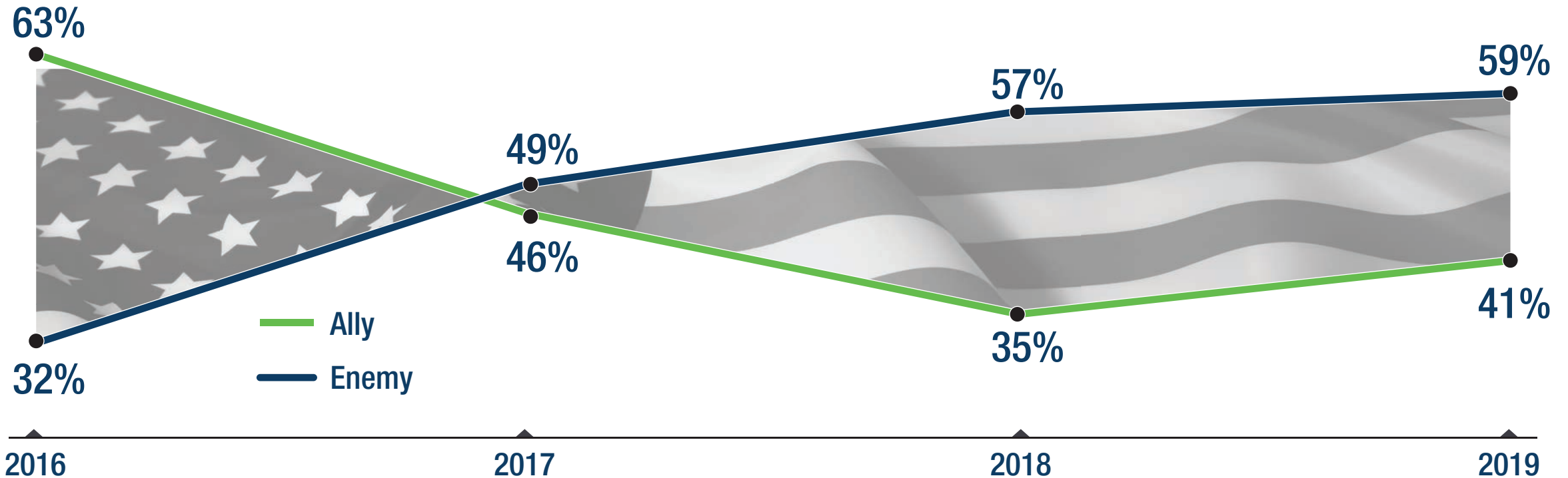


■ No real negative impact ■ A temporary negative impact ■ A long-term negative impact ■ Don't know

The share of young Arabs viewing the US as an adversary has nearly doubled since 2016



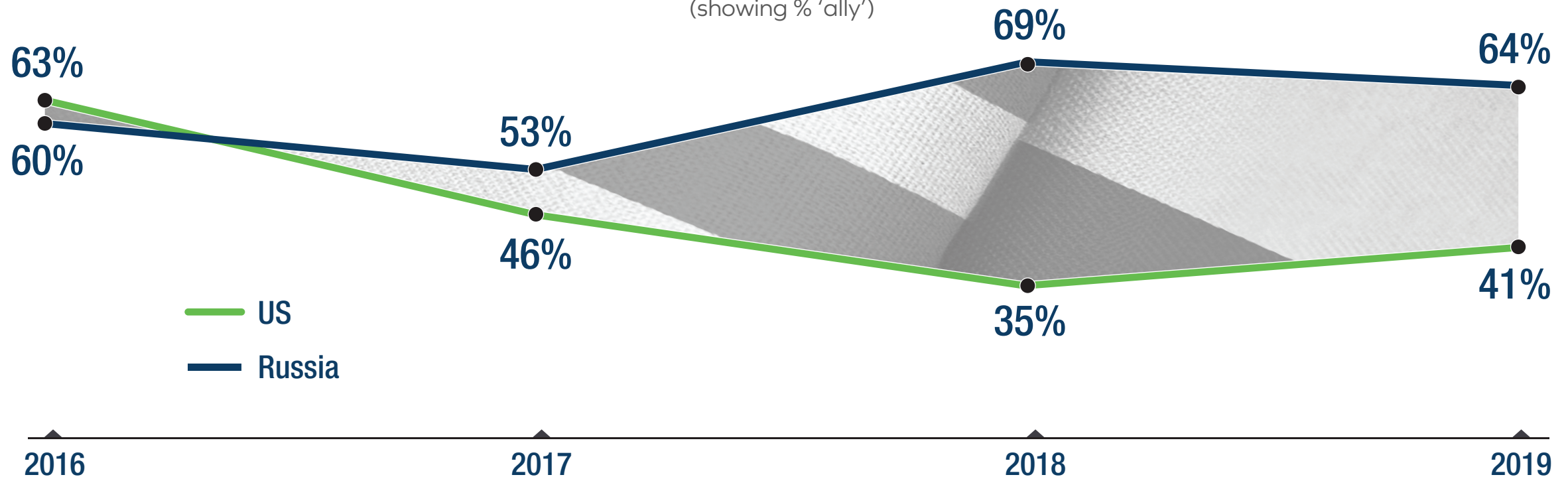
Do you consider the United States a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of your country?



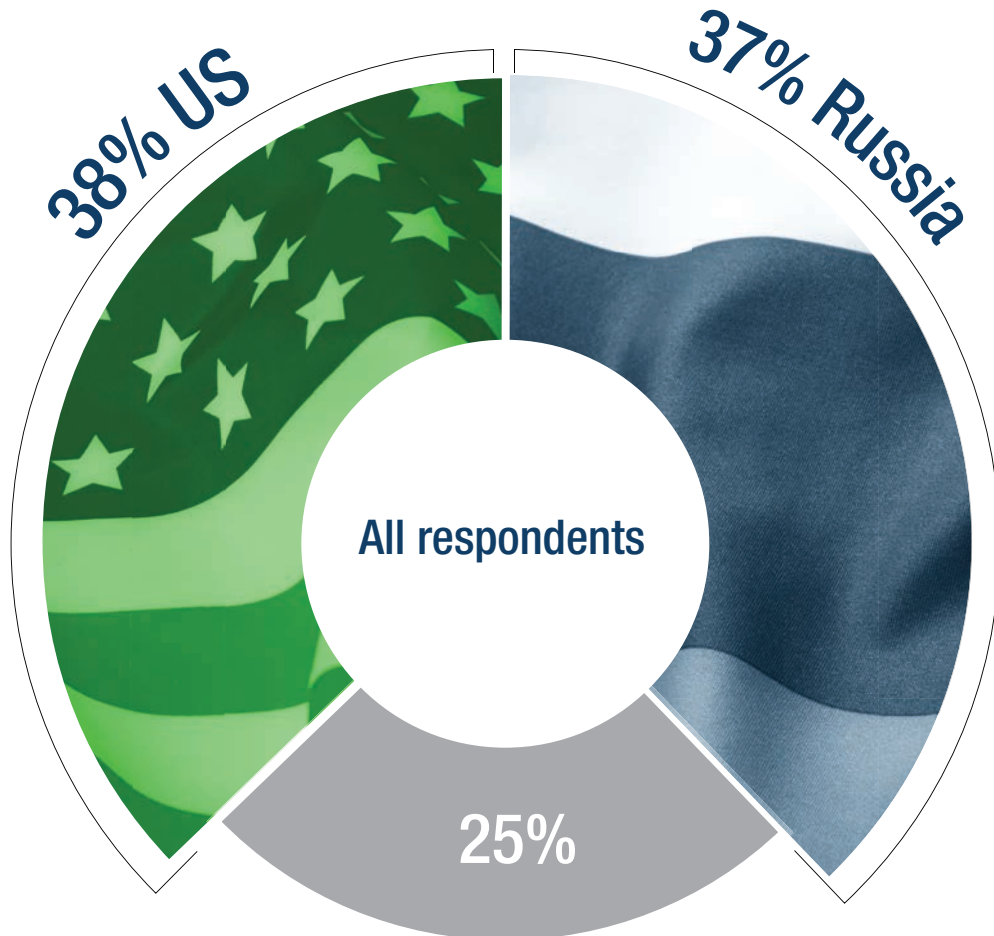
At the same time as US popularity has declined, Russia's stock has risen among the region's youth

Do you consider _____ a strong ally, somewhat of an ally, somewhat of an enemy, or a strong enemy of your country?

(showing % 'ally')



When asked to choose between the US and Russia, young Arabs are divided on which of the two is a stronger ally



Which of the two is a stronger ally of your country?

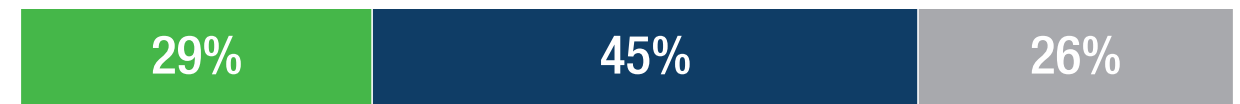
GCC



North Africa



Levant



■ US ■ Russia ■ Neither



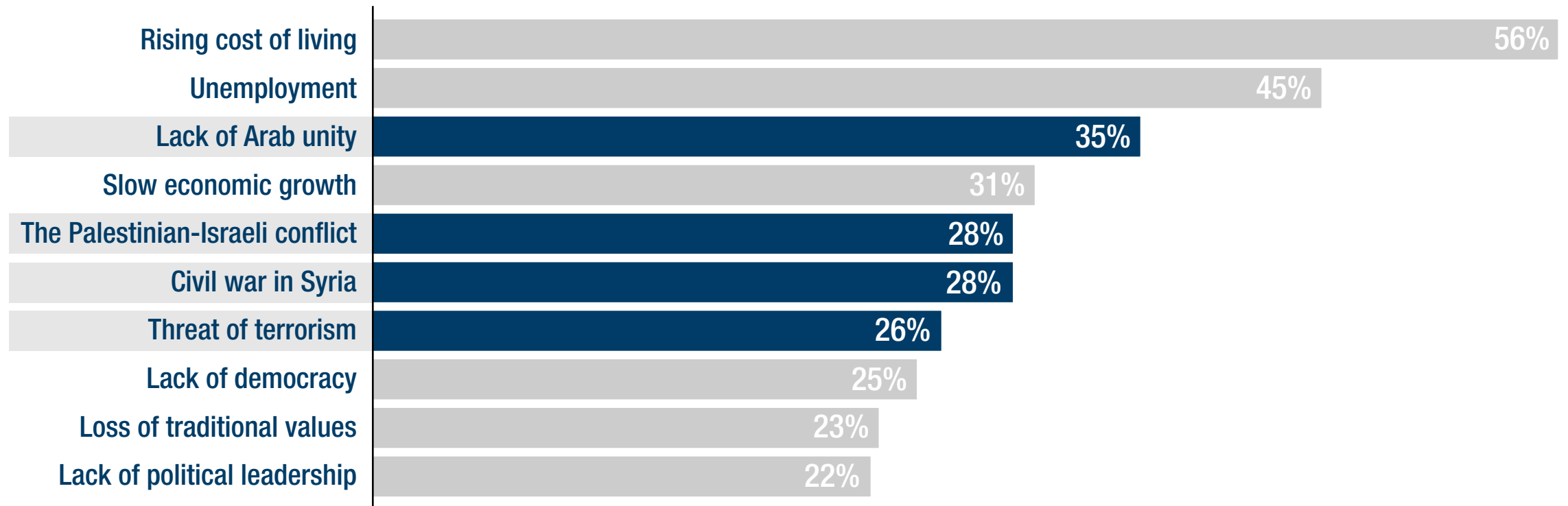
**Arab youth say it is time to put
an end to regional conflicts**

Young Arabs view ongoing geopolitical conflicts within the region among the top obstacles facing the Middle East



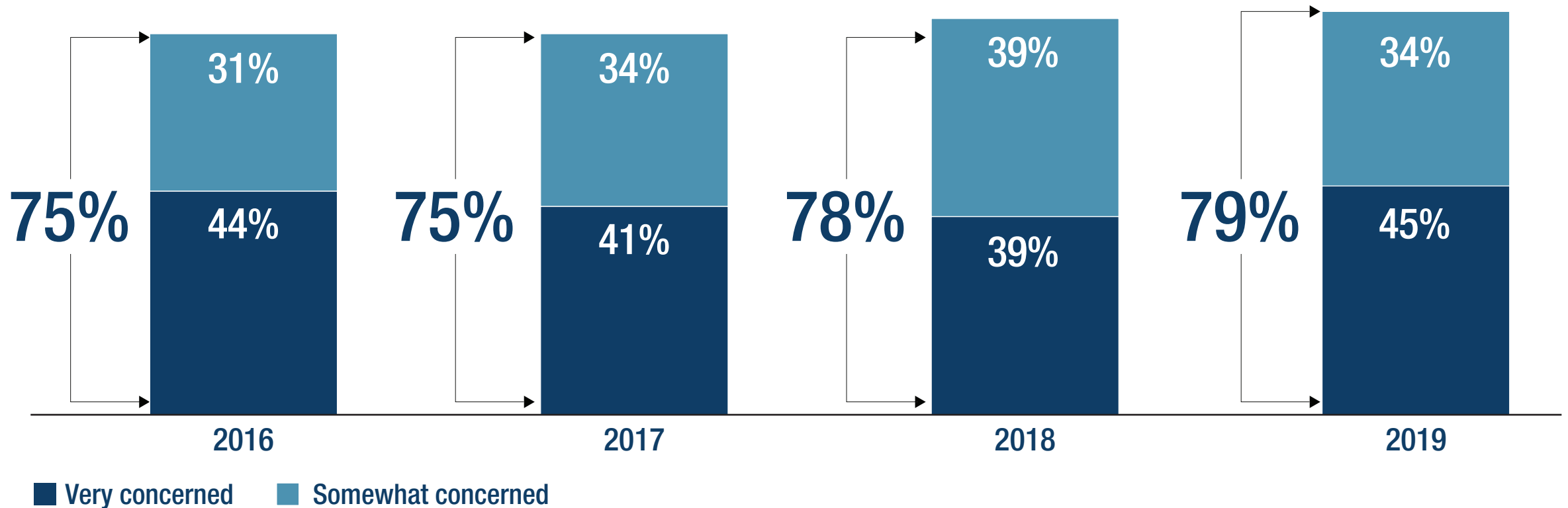
Now thinking about the Middle East, what do you believe is the biggest obstacle facing the Middle East?

(Showing top 10 obstacles)

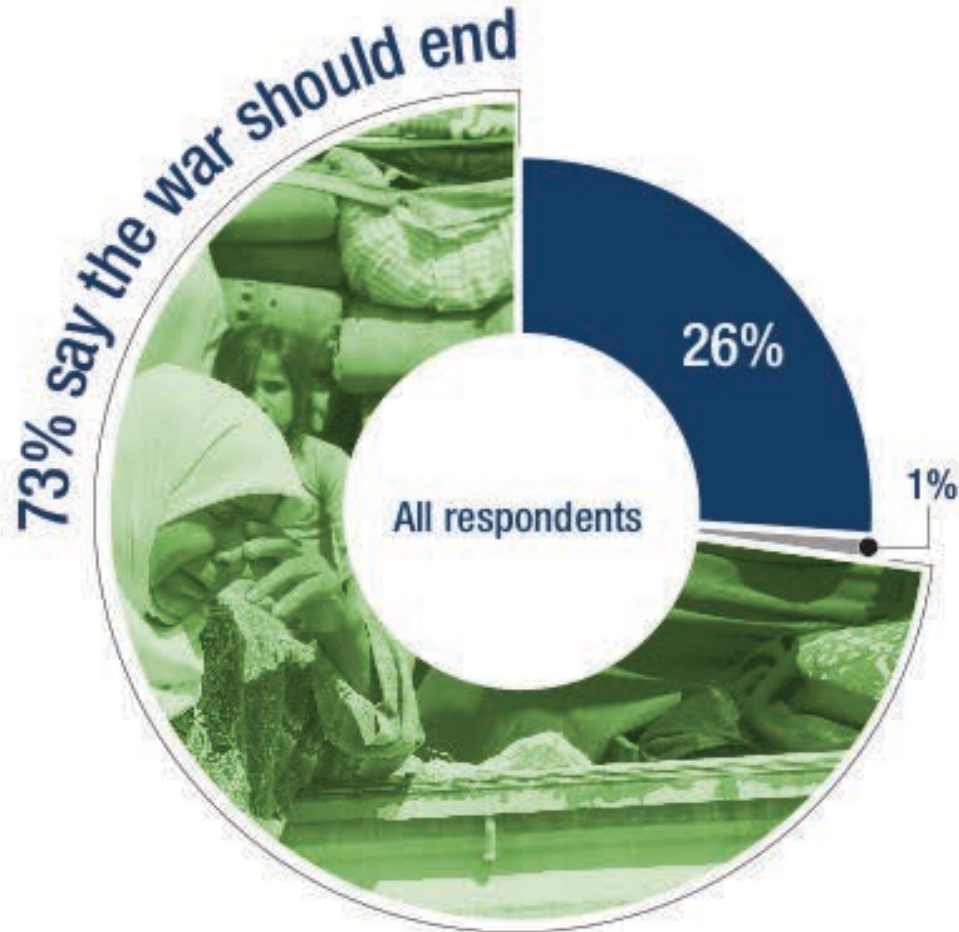


The Palestinian-Israeli conflict remains a real source of concern for many young Arabs

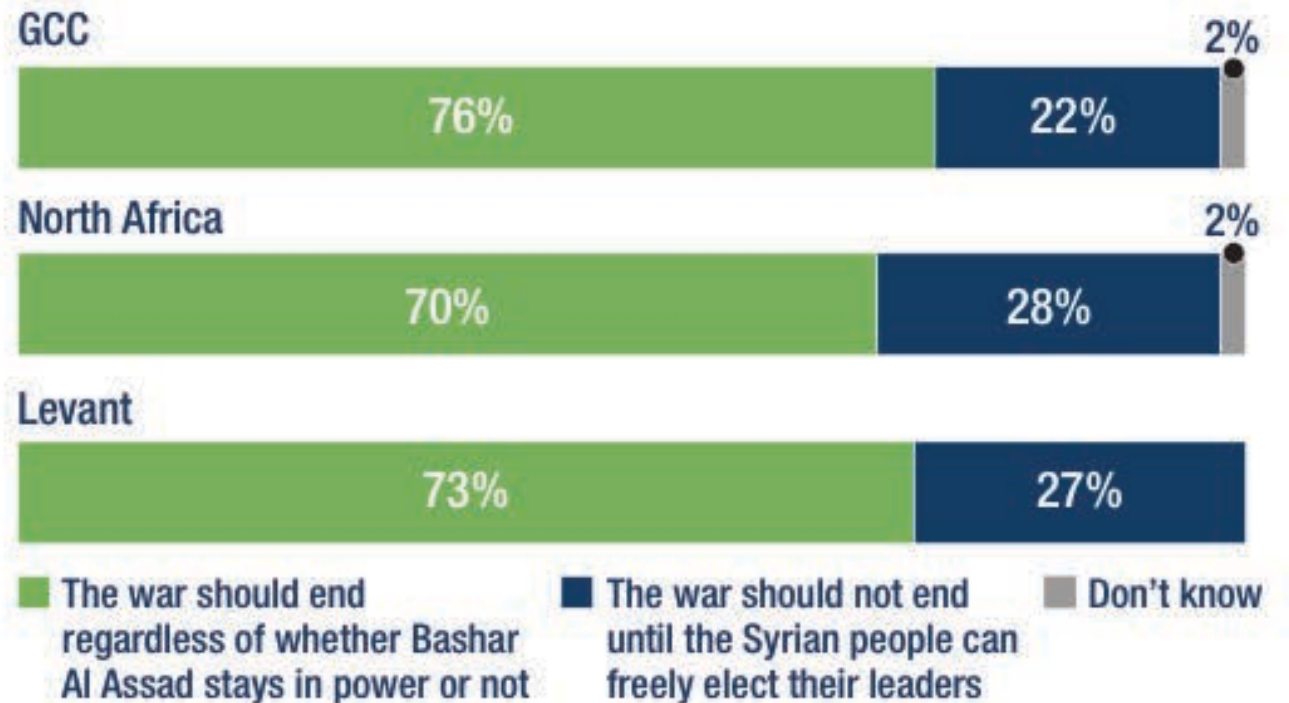
How concerned would you say you are about the Palestinian-Israeli conflict?



Arab youth across the region say the Syrian civil war should end, regardless of whether Bashar Al Assad stays in power or not



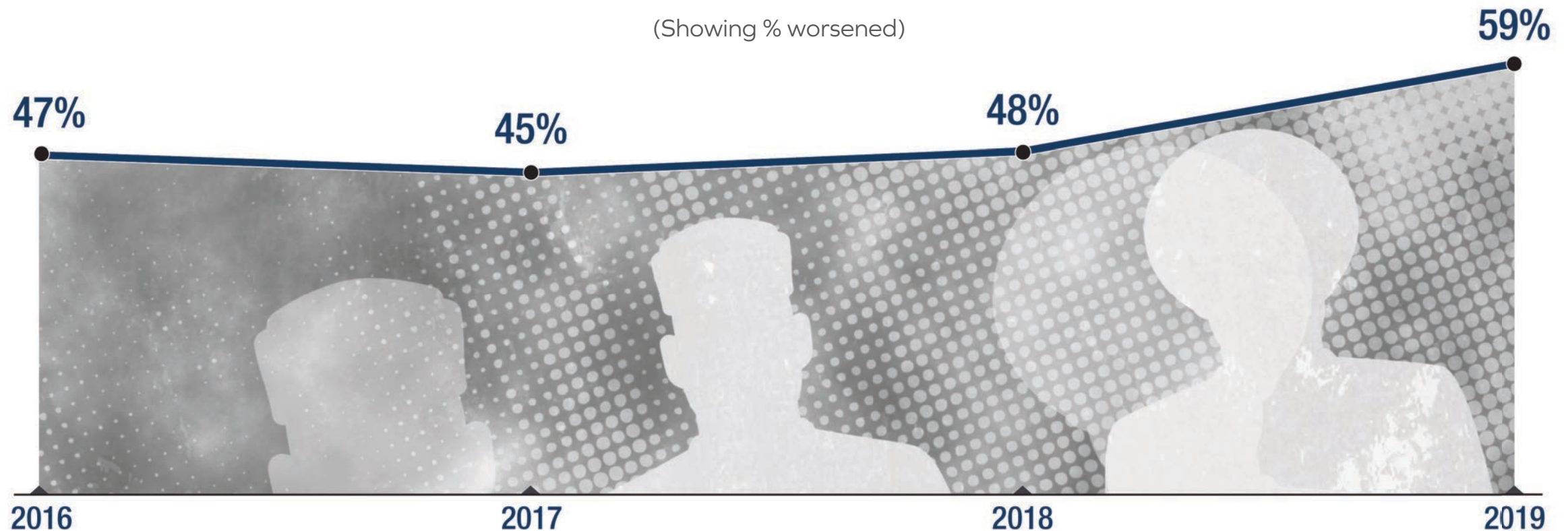
Which of the following is closer to your view about the civil war in Syria?



There is an increasing perception among Arab youth that the Shia-Sunni relations are getting worse

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

(Showing % worsened)





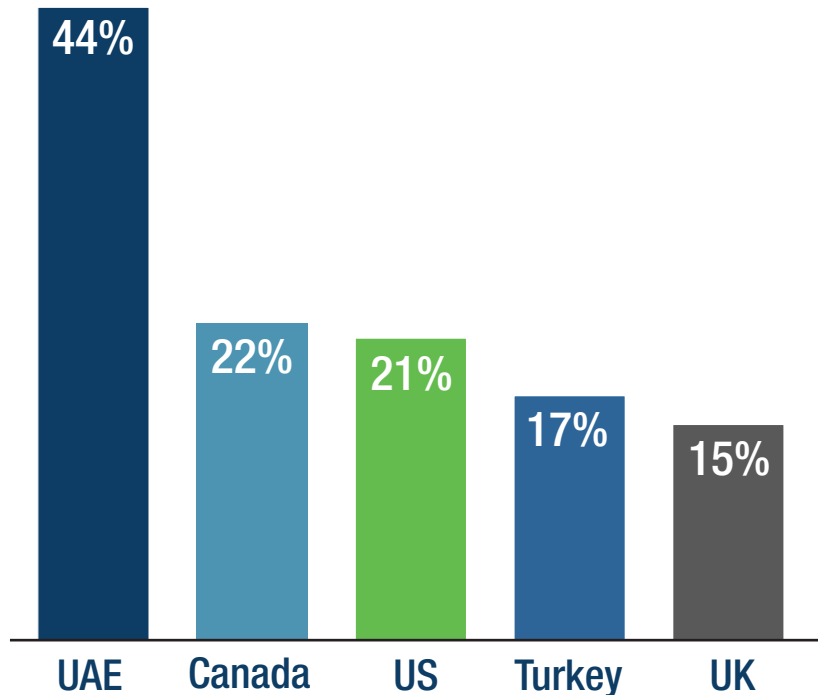
MODEL NATIONS

For the eighth year running, the UAE continues its surge as the Arab youth's top country to live in and to emulate

The UAE is the top model nation for the eighth year running with two in five young Arabs saying they would like to live in the UAE



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



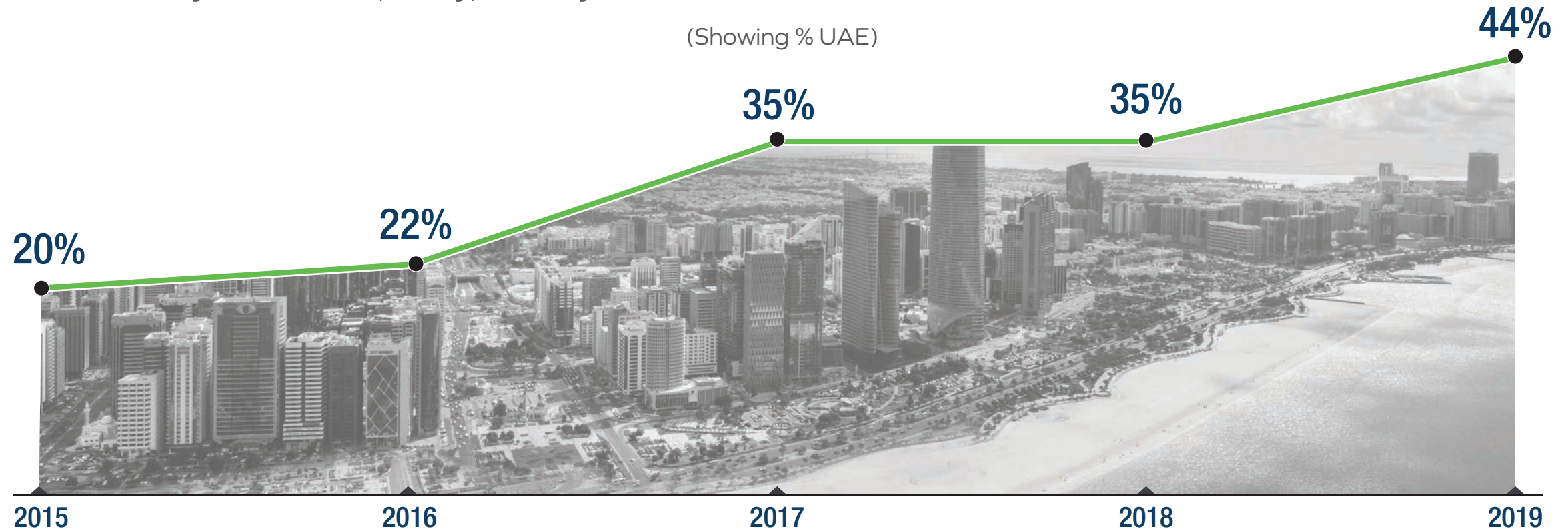
Top five countries to live in

	2012	2013	2014	2015	2016	2017	2018
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
France	France	France	US	US	US	US	Canada
US	US	US	UK	Germany	Germany	KSA	US
Turkey	Turkey	Turkey	KSA	Canada	KSA	Canada	KSA
KSA	KSA	KSA	Qatar	Qatar	Canada	Germany	Germany

Perceptions of the UAE as the best country to live in have surged over the past five years

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

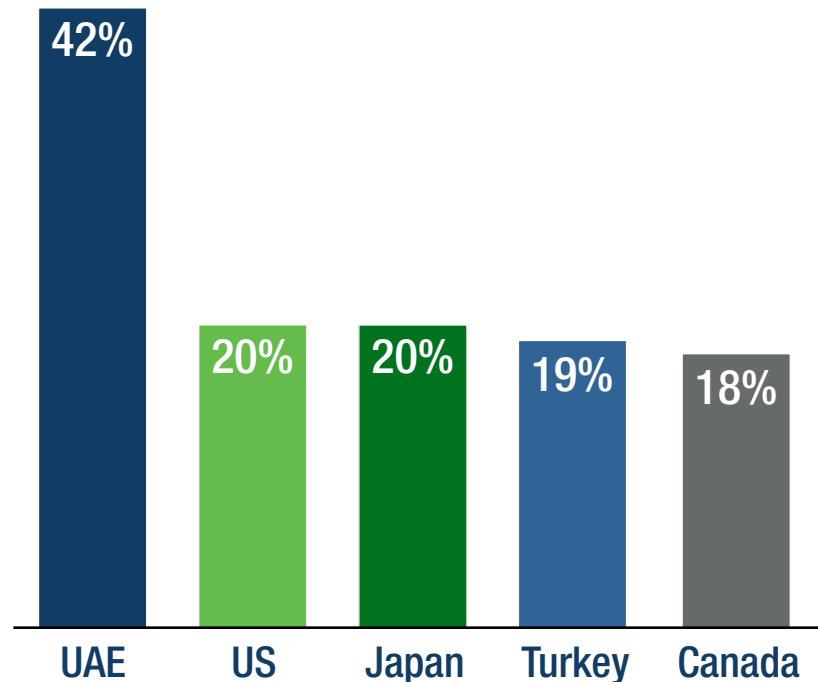
(Showing % UAE)



The UAE also remains the country young Arabs would like their country to emulate, far surpassing any other Arab or Western country



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



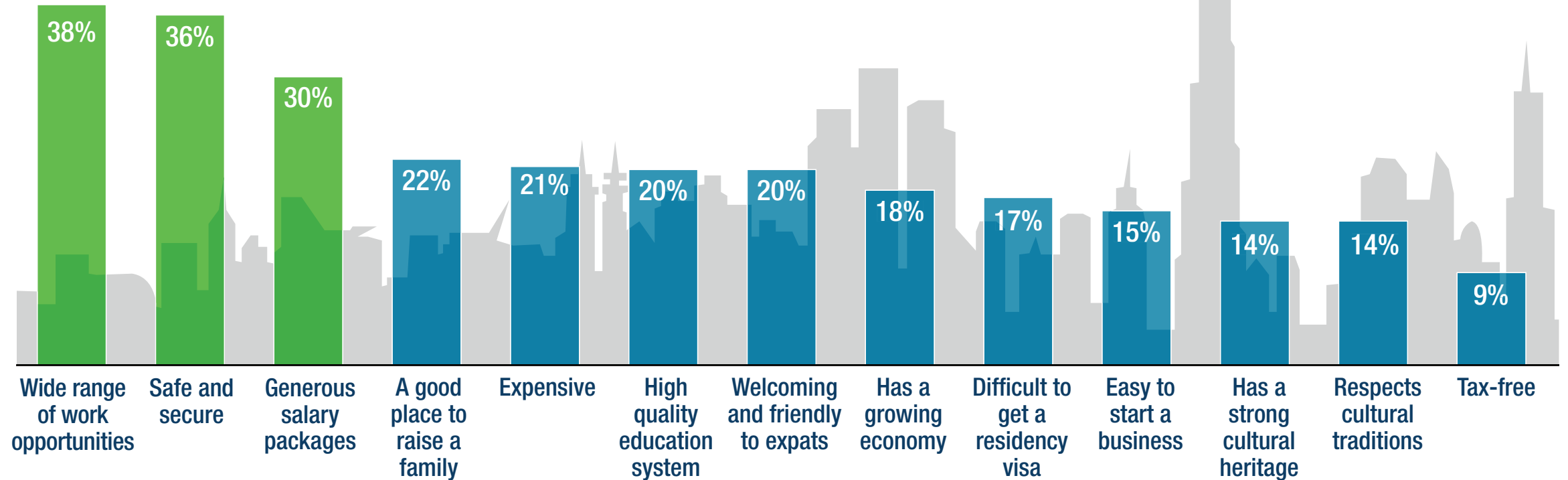
Top five countries to emulate

	2012	2013	2014	2015	2016	2017	2018
UAE	UAE	UAE	UAE	UAE	UAE	UAE	UAE
US	US	France	US	US	US	US	US
France	France	US	Qatar	Germany	Germany	Canada	Canada
Turkey	Turkey	Turkey	KSA	Canada	France	Germany	Japan
China	China	China	UK	France	UK	KSA	Germany

Young Arabs are drawn to the UAE by job opportunities and salary packages, as well as safety and security



Now thinking specifically about the United Arab Emirates, which of the following phrases, if any, do you associate most with the UAE?





DRUG USE

A majority of young Arabs say drugs are easy to get in their country and drug use is on the rise

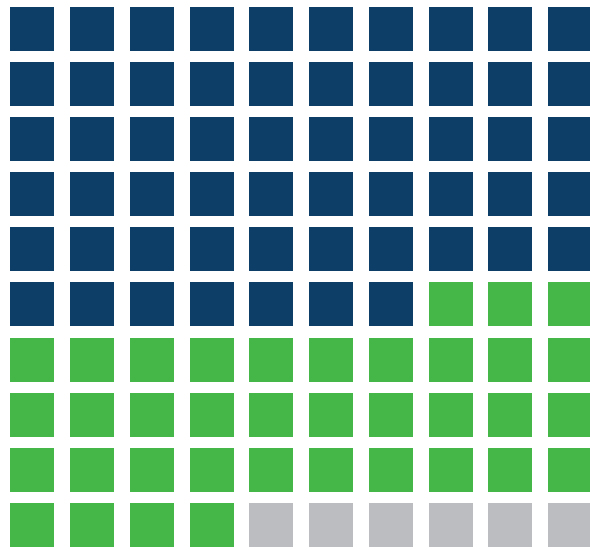
Young Arabs, particularly in the Levant and North Africa, say drugs are easy to get in their country



Which of the following is closer to your opinion?

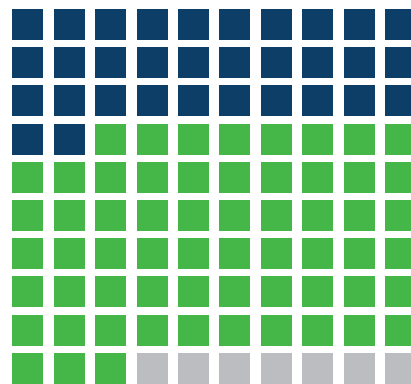
All respondents

57%



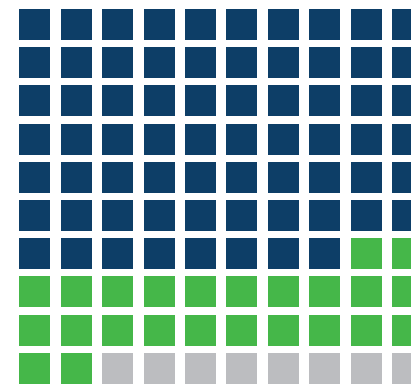
GCC

32%



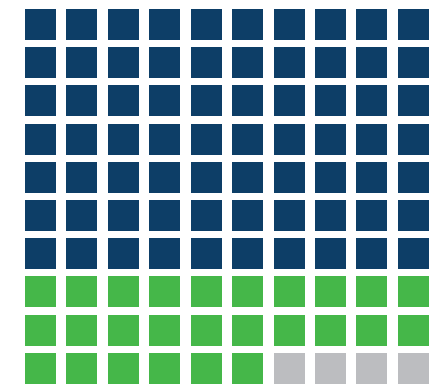
North Africa

68%



Levant

70%

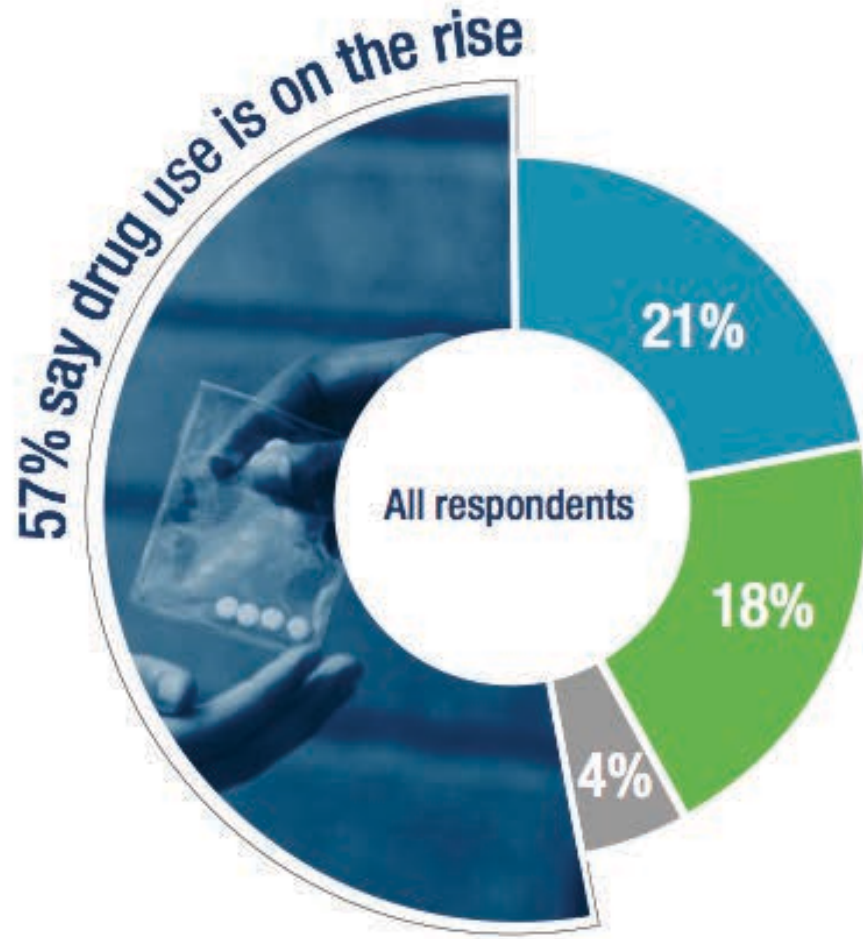


■ Drugs are easy to get in my country

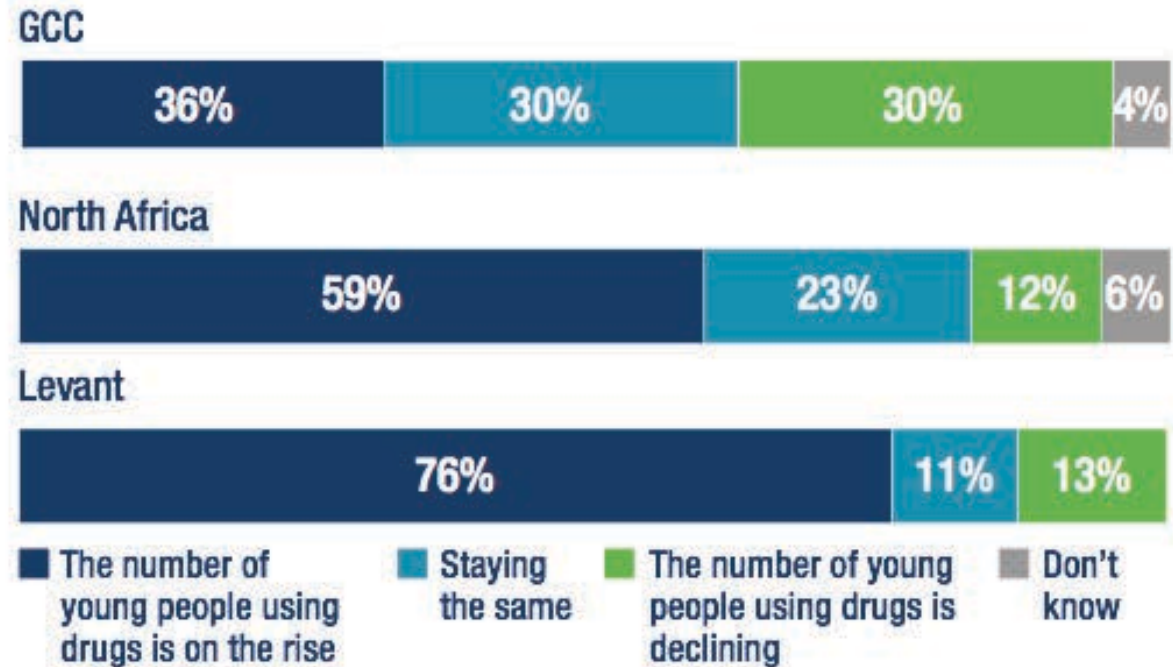
■ Drugs are difficult to get in my country

■ Don't know

Many young Arabs, especially in the Levant, say drug use among youth is on the rise in their country



Which of the following is closer to your opinion?

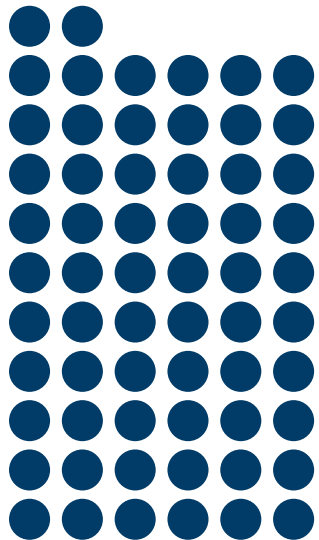


Arab youth view peer pressure as the top driver of drug use; many also point to stress relief and boredom



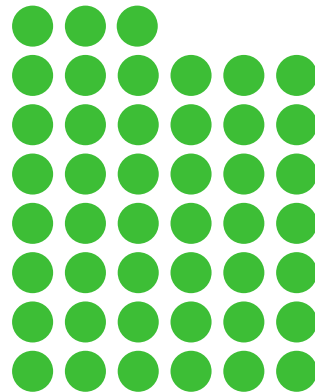
Why do you think young people start using drugs?

62%



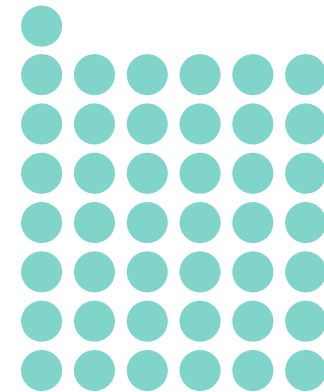
Encouragement by friends at school/work

45%



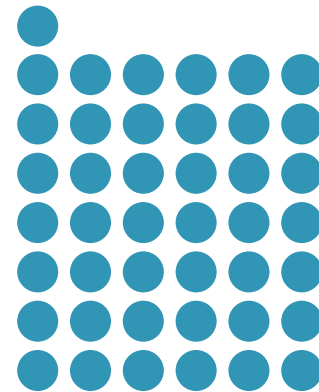
Stress relief

43%



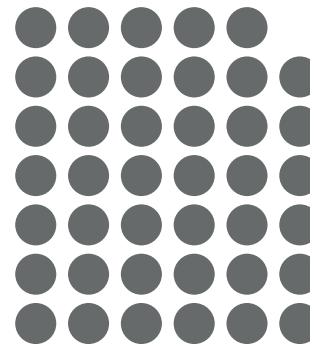
Boredom

43%



It's easy to access drugs

41%



Lack of entertainment options

9%



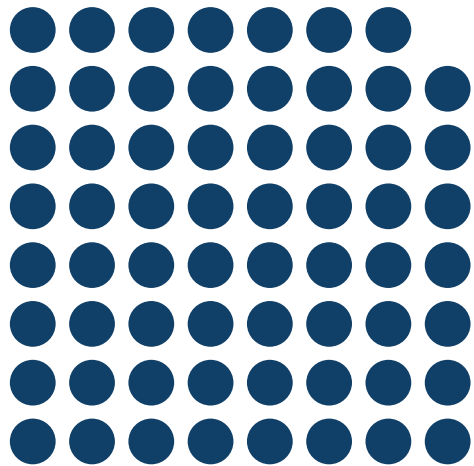
Using drugs is a sociable activity

Stricter laws, better law enforcement and education are seen as the best ways to combat drug use



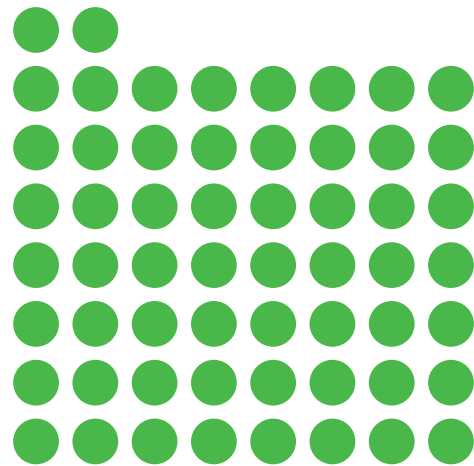
Which are the best ways to reduce drug usage in your country?

63%



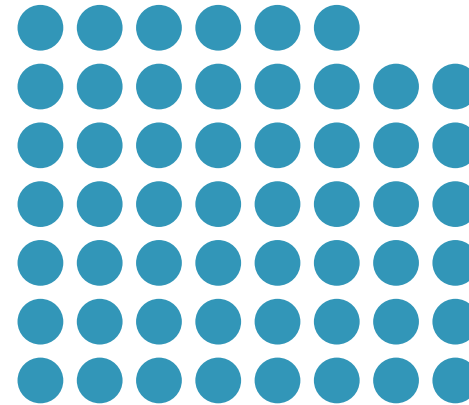
Stricter laws

58%



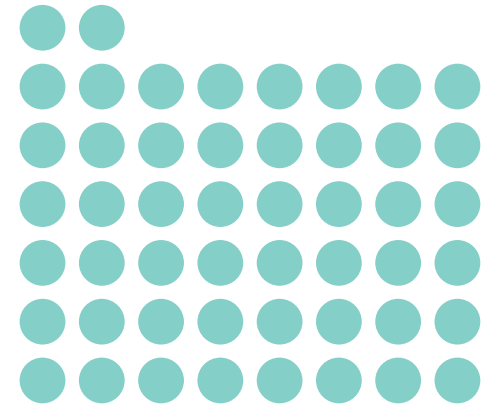
More efficient law enforcement

54%



Better education and awareness on the negative effects of drugs

50%



More rehabilitation and counselling services available



Mental health is an issue many young Arabs are familiar with, yet access to quality medical care is scarce

One-third of young Arabs say they know someone suffering from mental health issues



Do you know anyone who is suffering from mental health issues, such as anxiety and depression?

GCC



North Africa



Levant



Yes No

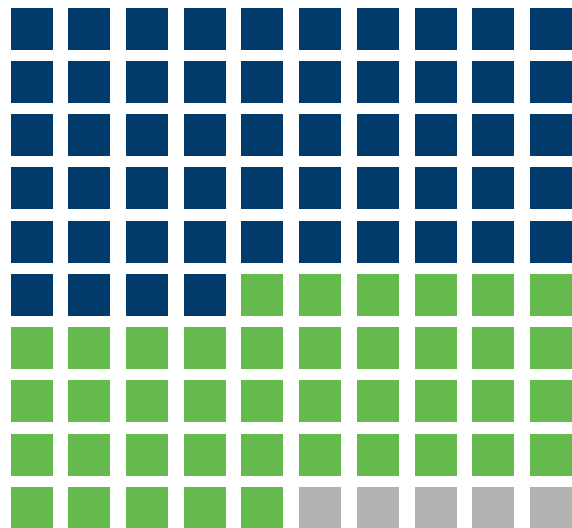
A majority, particularly in the Levant, say quality medical care for mental health issues is difficult to access in their country



How easy or difficult do you think it would be to get quality medical care for mental health issues, such as anxiety or depression, in your country?

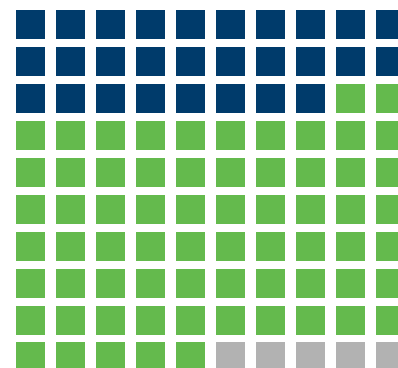
All respondents

54%



GCC

28%



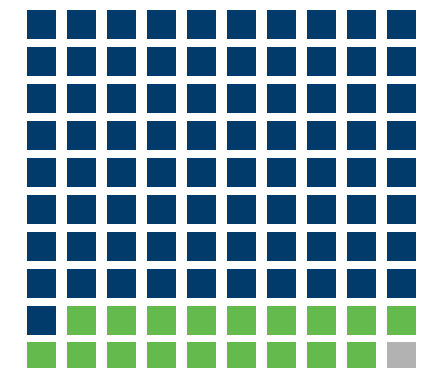
North Africa

52%



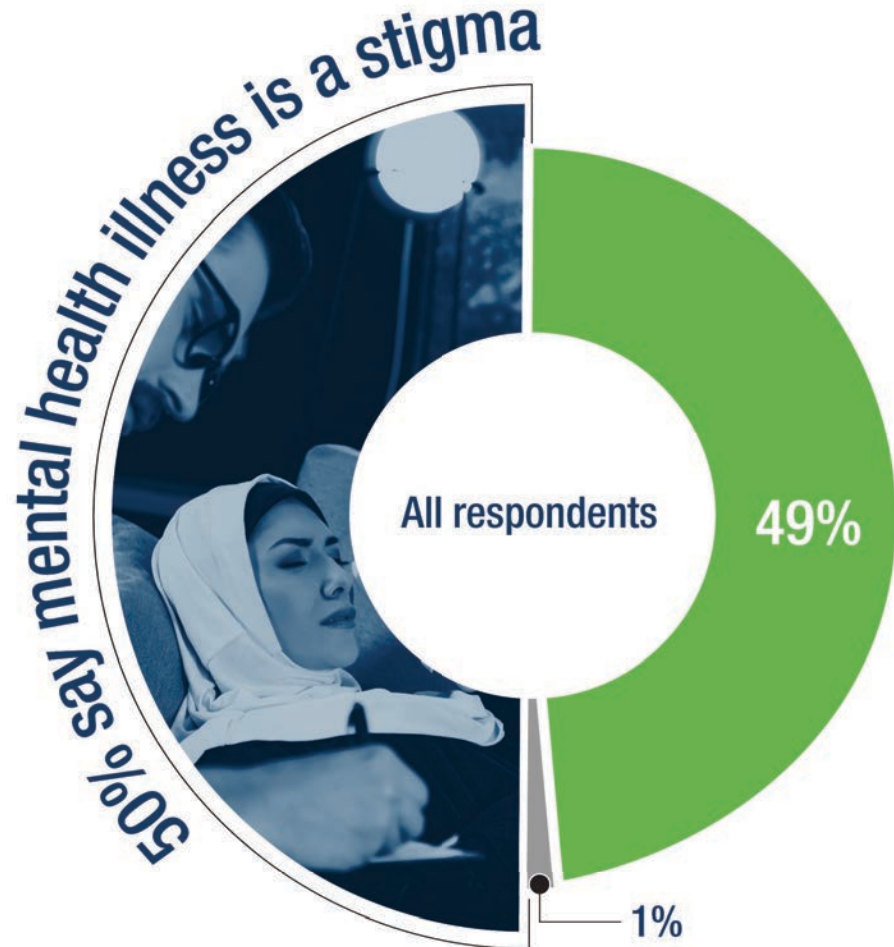
Levant

81%



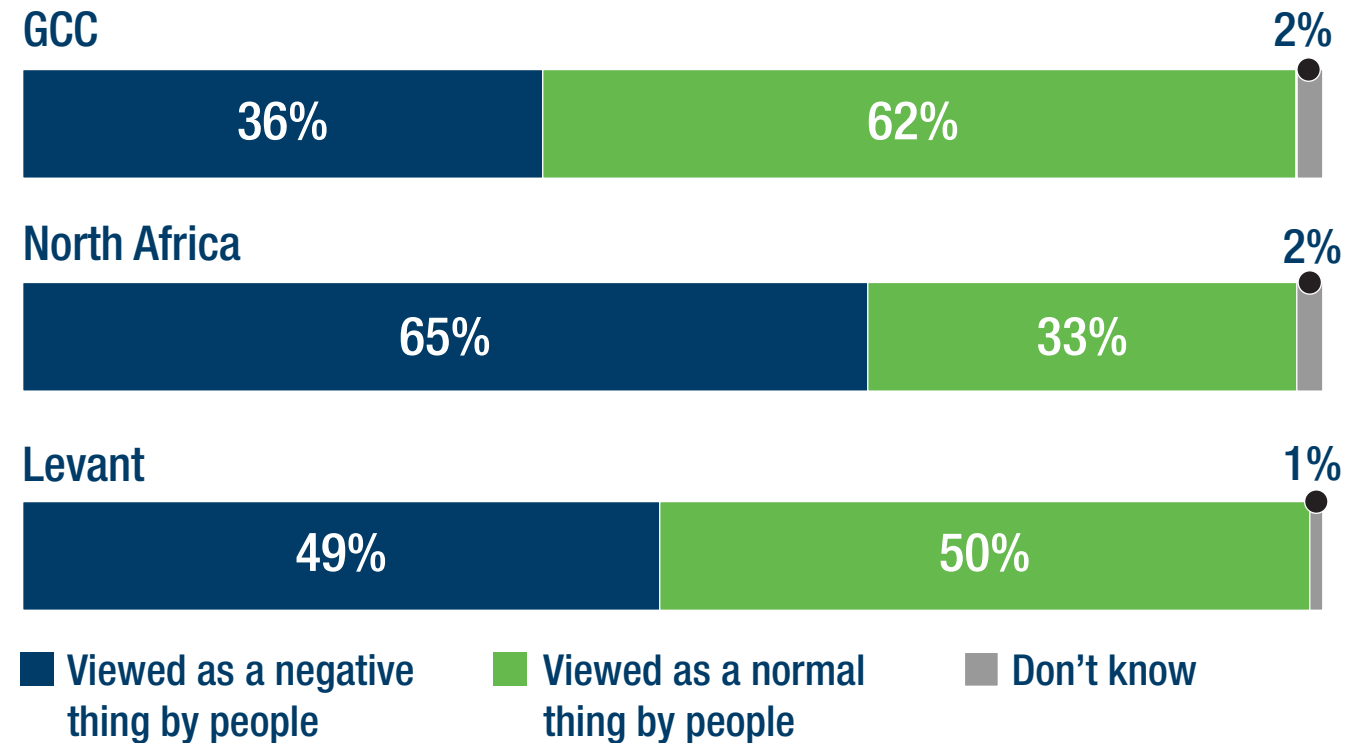
■ Difficult ■ Easy ■ Don't know

Half of Arab youth say there is a stigma around seeking medical care for mental health issues



Which of the following is closer to your opinion?

“In my country, seeking medical care for mental health issues, such as anxiety or depression, is...”

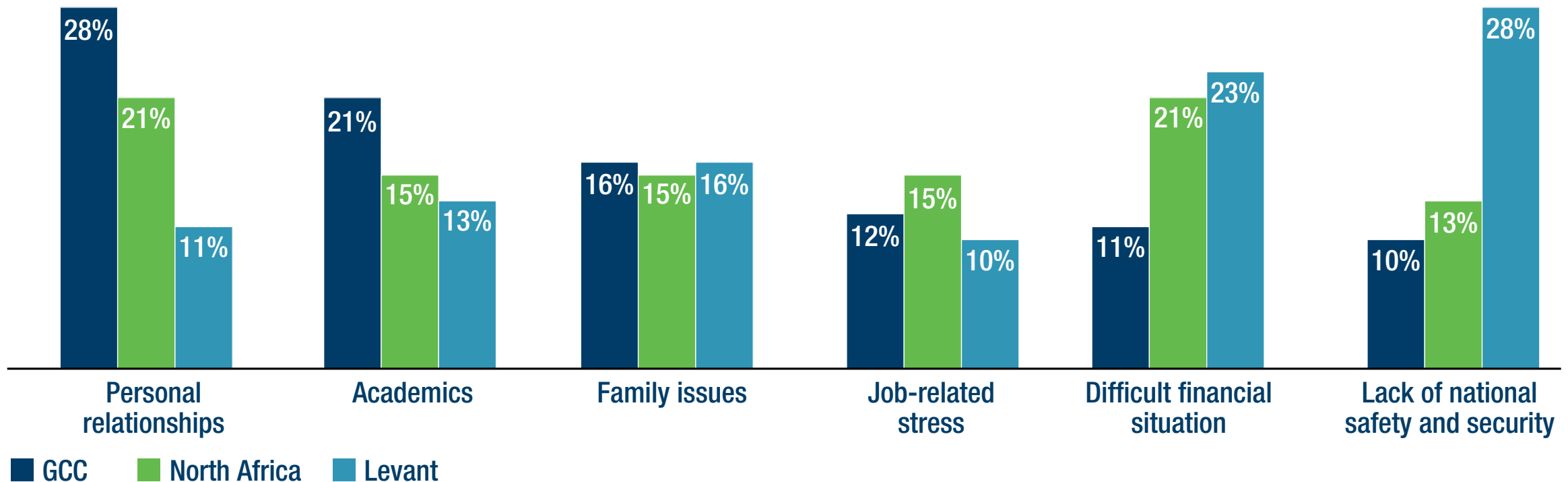


While personal relationships are the biggest source of stress among youth in the GCC, safety and difficult financial situations are the top sources of stress in the Levant



Which of the following, if any, is the biggest source of stress in your daily life?

(Ranked by GCC response)





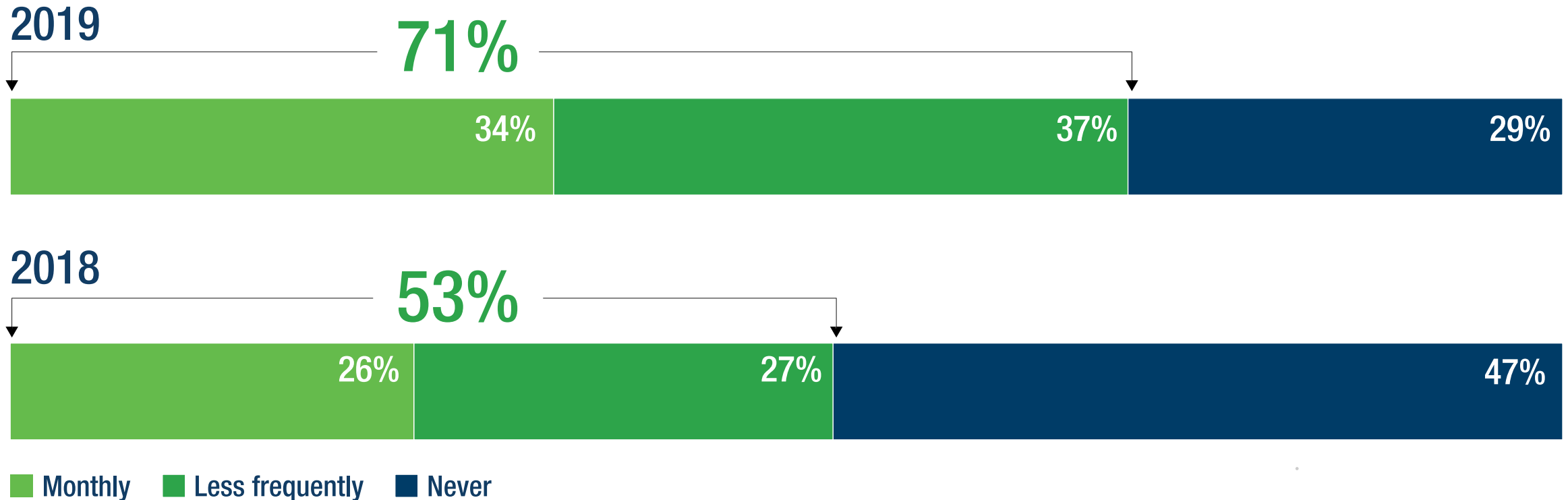
E-COMMERCE

**Young Arabs are driving the
region's e-commerce boom**

The number of young Arabs shopping online has spiked significantly over the past year



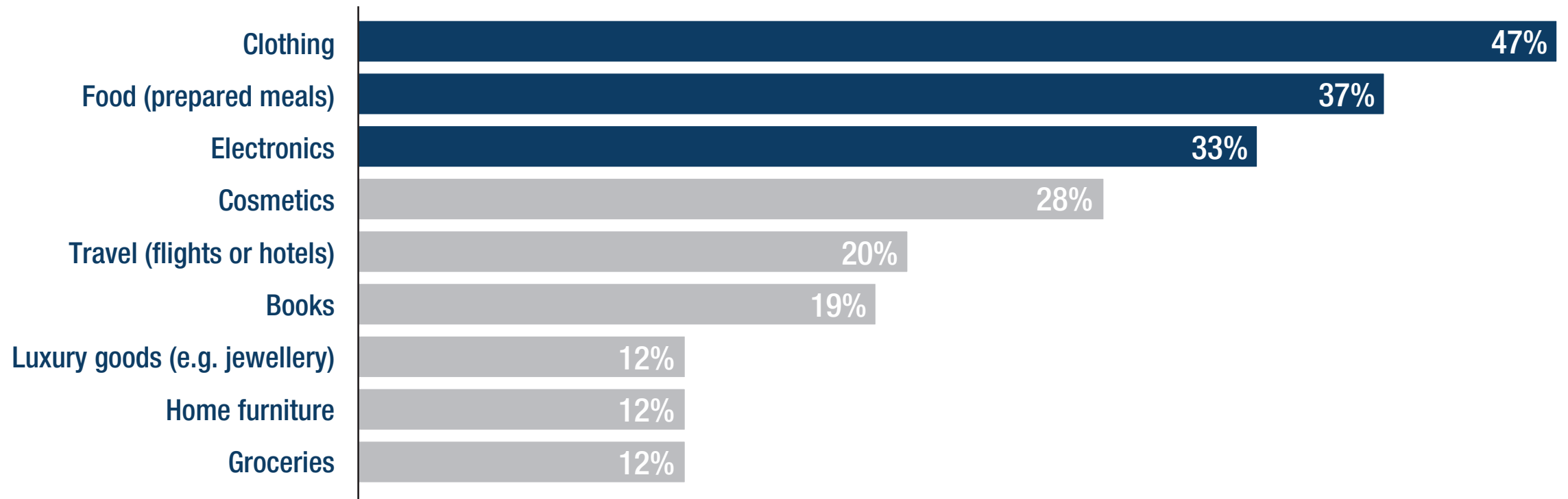
How frequently, if at all, do you shop online?



Clothing, meals and electronics are the key drivers of e-commerce among young Arabs



Which of the following products or services, if any, have you purchased online?

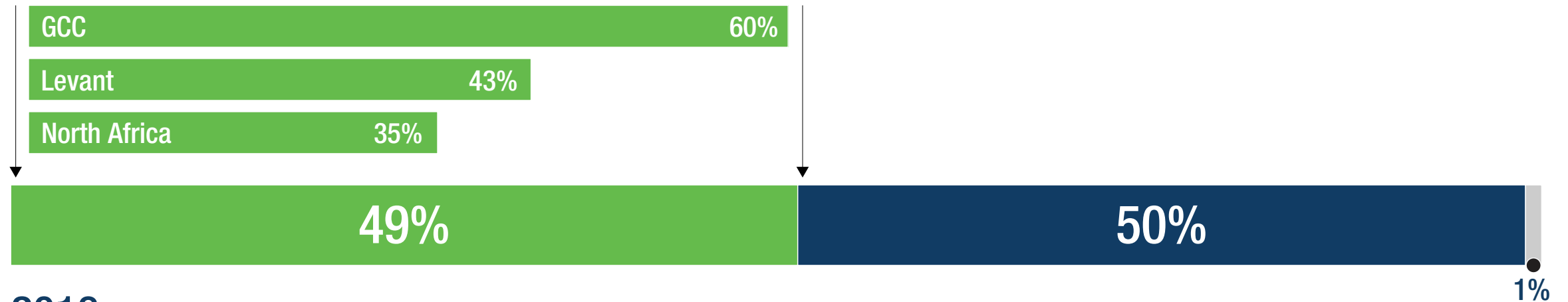


Half of young Arab online shoppers, particularly in the GCC, prefer to pay by card rather than cash



When shopping online, which payment method do you prefer using?

2019



2018



■ Credit/debit/pre-paid card ■ Cash on delivery ■ Don't know

10

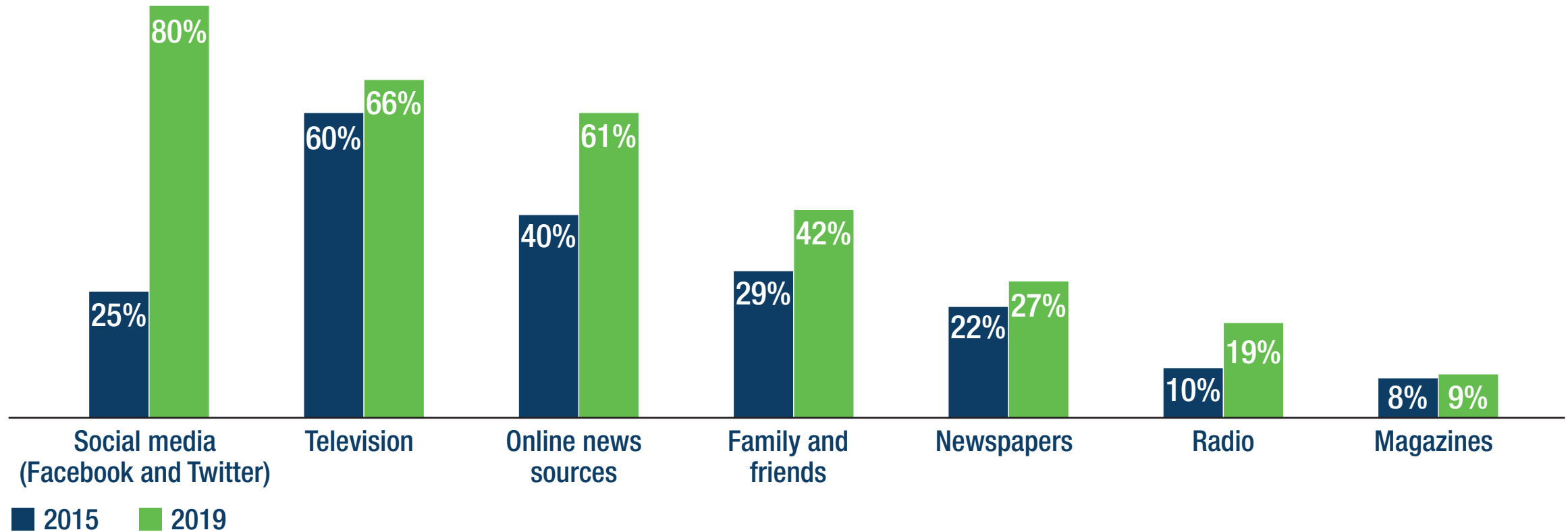
MEDIA CONSUMPTION

Among Arab youth, social media is more popular and seen as more trustworthy than traditional media

Over the past five years, social media has become the dominant source for news among Arab youth, while online news portals are now on par with TV



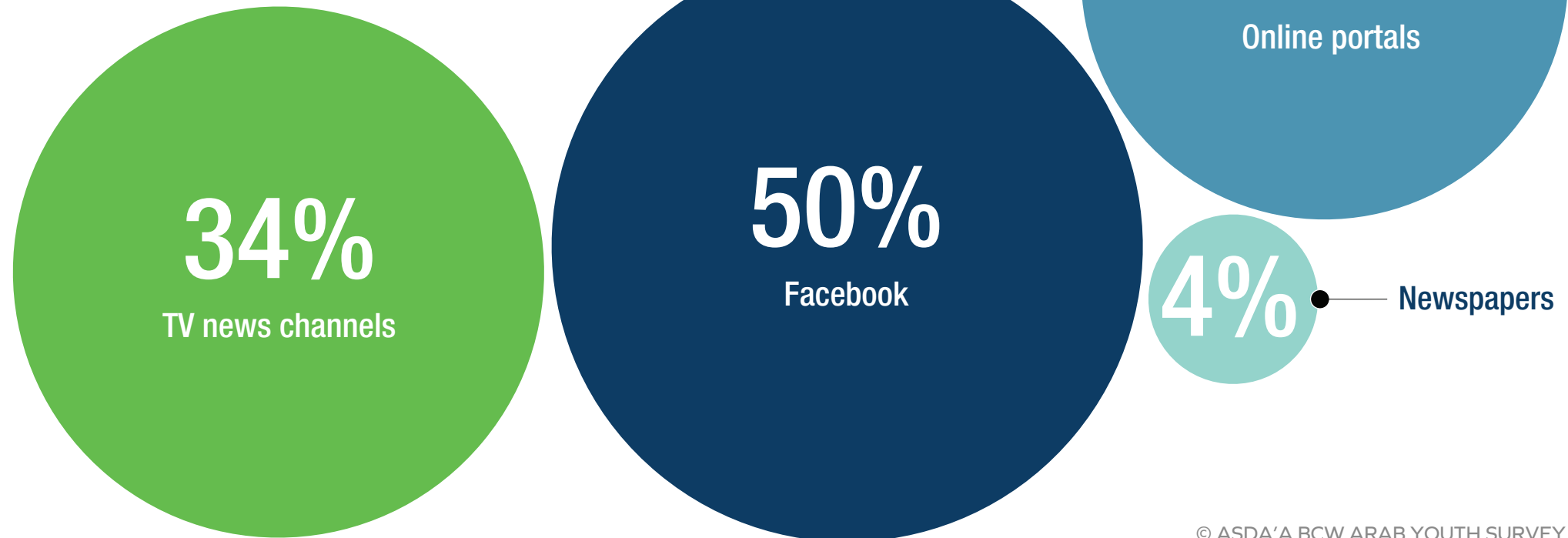
Where do you get your news?



More young Arabs get their daily news on Facebook or online portals than TV news channels

How often do you get your news on the following news sources?

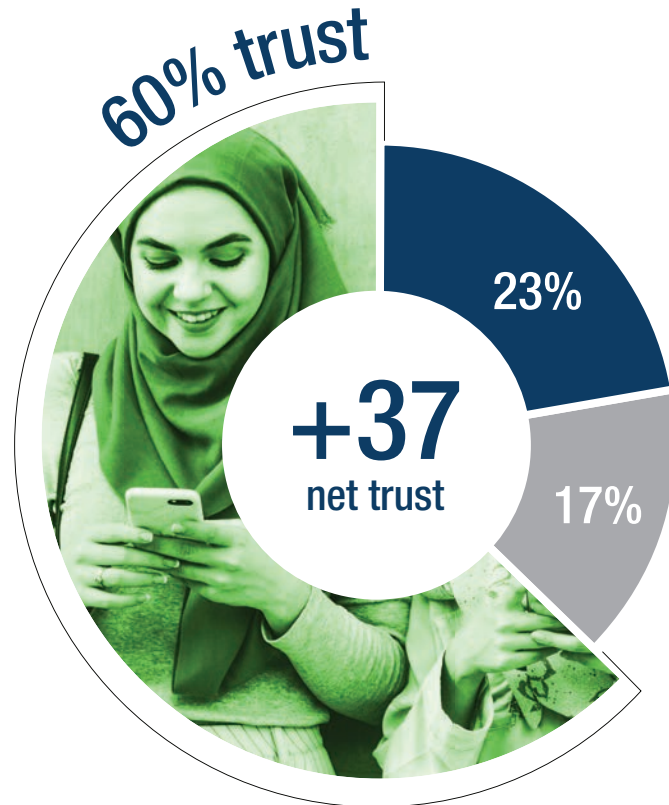
(Showing % 'daily')



Among young Arabs, social media is trusted more than traditional media

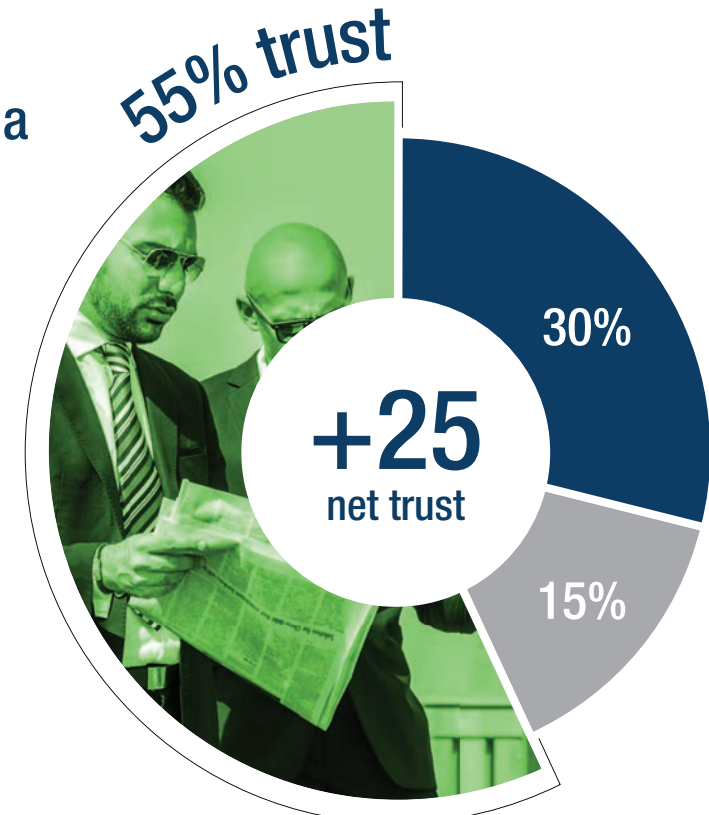
How much do you trust the following to do the right thing?

Social media



Traditional media

(TV, newspapers, radio)

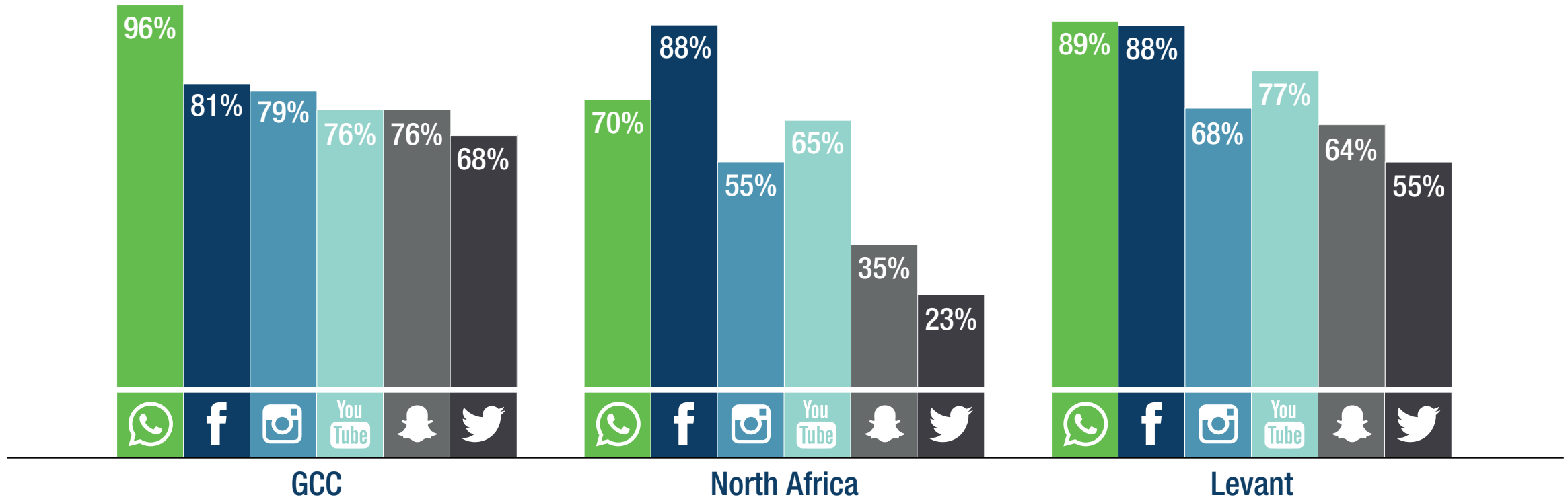


- Trust
- Distrust
- Don't know

Nine in ten young Arabs use at least one of the major social media channels daily

How often do you visit each of the following?

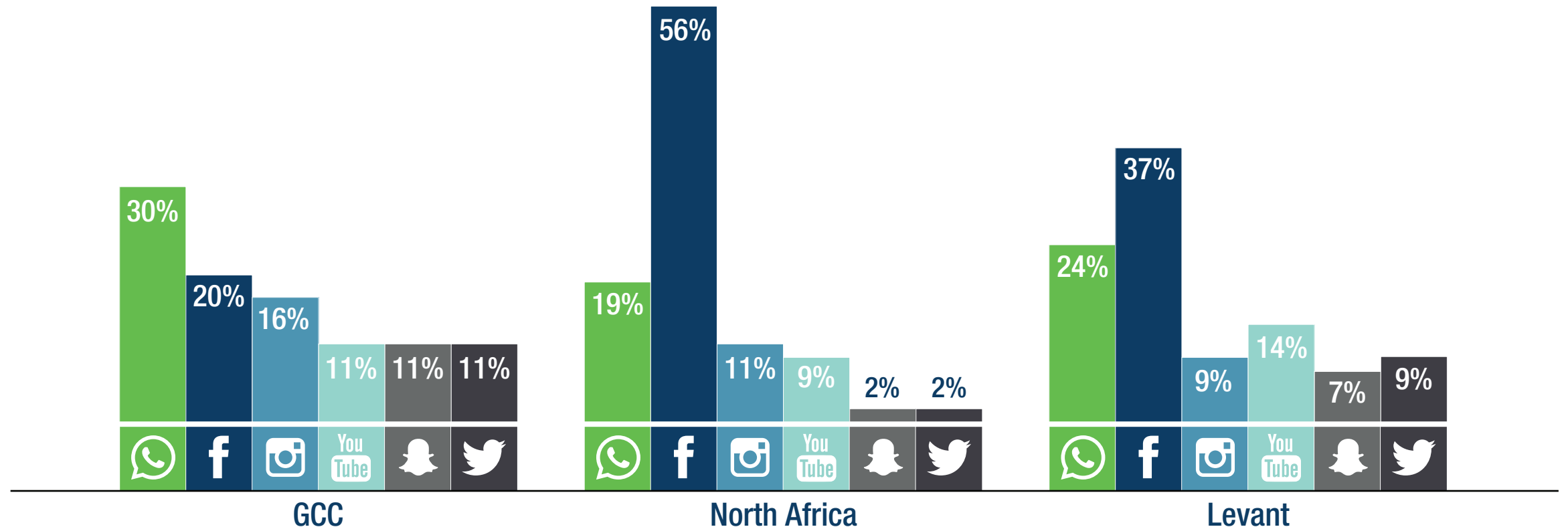
(Showing % 'daily')



Facebook is by far the most dominant social media channel in North Africa and Levant, while GCC youth are more likely to say WhatsApp is the most important social media channel



Which of the following social media channels is the most important to you?



TOP 10 FINDINGS



1

Religion

Young Arabs say religion plays too big of a role in the Middle East and religious institutions need to be reformed

2

Government Role

As the region faces economic concerns, Arab youth feel entitled to government support

3

Education

Three in four young Arabs are unhappy with education in their country, and more than half want to pursue further education in the West

4

Foreign Relations

Arab youth view Saudi Arabia and the US as the two nations increasing their influence most in the Arab world

5

Conflicts

Arab Youth say it is time to put an end to regional conflicts

6

Model Nations

For the eighth year running, the UAE continues its surge as the Arab youth's top country to live in and to emulate

7

Drug Use

A majority of young Arabs say drugs are easy to get in their country and drug use is on the rise

8

Mental Health

Mental health issues impact many young Arabs, yet access to quality medical care is scarce

9

E-commerce

Young Arabs are driving the region's e-commerce boom

10

Media Consumption

Among Arab youth, social media is more popular and seen as more trustworthy than traditional media

11TH ANNUAL ASDA'A BCW ARAB YOUTH SURVEY 2019

A CALL FOR REFORM