

10 YEARS OF
ARAB YOUTH
SURVEY

A DECADE OF HOPES & FEARS

#ArabYouthSurvey

arabyouthsurvey.com

#arabyouthsurvey

asdaabm.com

About the 2018 Arab Youth Survey

The ASDA'A Burson-Marsteller 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 10th annual ASDA'A Burson-Marsteller Arab Youth Survey 2018, PSB Research, an international polling firm, conducted a study with the following parameters:

- 3,500 face-to-face interviews
- Arab youth in the age group of 18-24 years
- Country nationals only
- Sample split 50:50 male/female

16 Arab States:		
GCC	North Africa	Levant + Other
Bahrain	Algeria	Jordan
Kuwait	Egypt	Iraq
Oman	Libya	Lebanon
Qatar	Morocco	Palestinian Territories
Saudi Arabia	Tunisia	Yemen
UAE		



Methodology

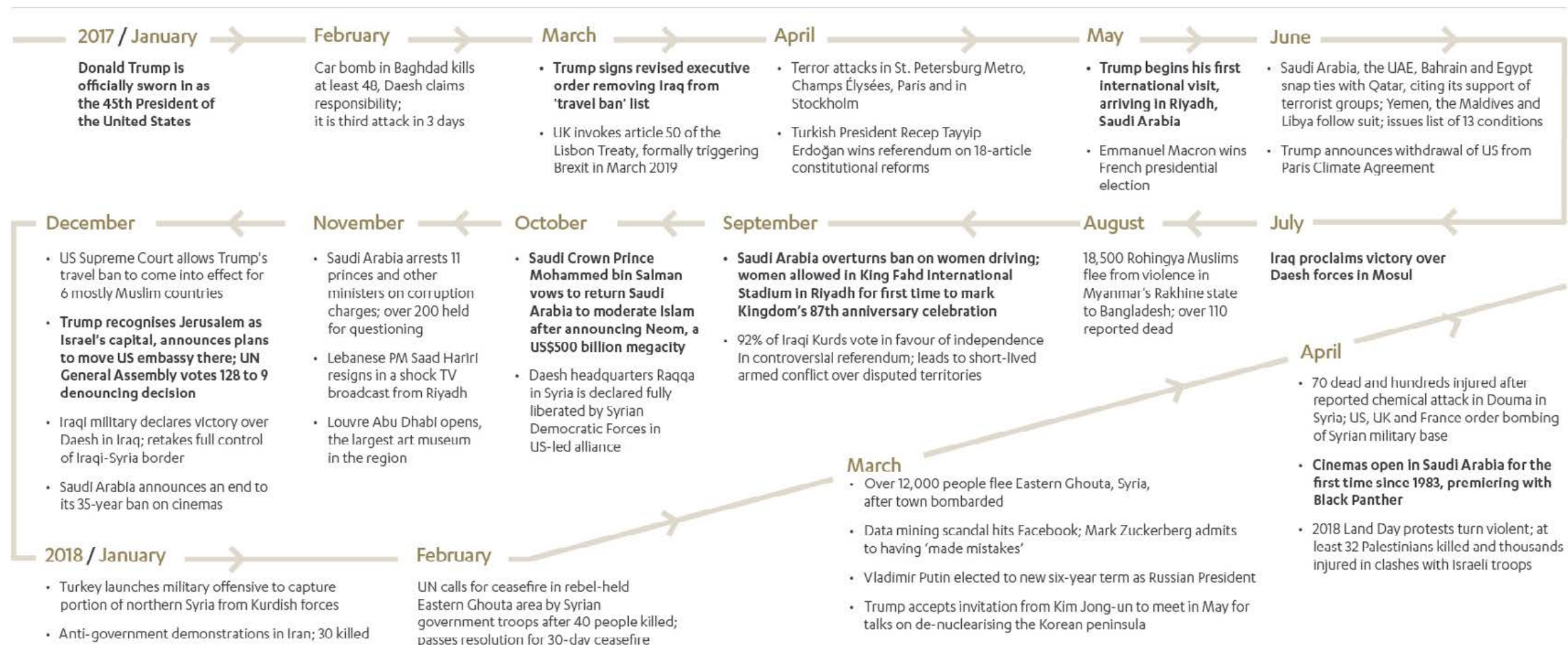
3,500 face-to-face interviews were conducted from January 21st to February 20th, 2018 by professional interviewers. The interviews were completed in Arabic and English. Margin of error is +/-1.65% for the total sample and larger for sub-groups.

Sample details are below:

ORIGINAL 2008 COUNTRIES									NEW IN 2011	NEW IN 2012		NEW IN 2013			NEW IN 2014
UAE	OMAN	QATAR	BAHRAIN	KSA	KUWAIT	EGYPT	JORDAN	LEBANON	IRAQ	TUNISIA	LIBYA	ALGERIA	MOROCCO	YEMEN	PALESTINIAN TERRITORIES
N=300	N=200	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
ABU DHABI 40%	MUSCAT 50%	DOHA 55%	MANAMA 100%	RIYADH 40%	KUWAIT CITY 20%	CAIRO 50%	AMMAN 50%	BEIRUT 60%	BAGHDAD 50%	TUNIS 50%	TRIPOLI 50%	ALGIERS 50%	RABAT 25%	SANA'A 50%	WEST BANK 50%
DUBAI 40%	BATINAH 50%	AL RAYYAN 45%		JEDDAH 40%	AL HAWALLI 30%	ALEXANDRIA 25%	IRBID 25%	SAIDA 20%	IRBIL 25%	SAFAQIS 25%	BENGHAZI 25%	ORAN 25%	CASABLANCA 25%	AL HUDAYDAH 25%	GAZA 50%
SHARJAH 20%				DAMMAM 20%	AL AHMADI 20%	MANSOURA 25%	ZARQA 25%	TRIPOLI 20%	BASRA 25%	SUSAH 25%	MISRATA 25%	CONSTANTINE 25%	FES 25%	TA'IZZ 25%	
				FARWANIYA 30%									MARRAKECH 25%		



Key Events of 2017 and Q1 2018





1

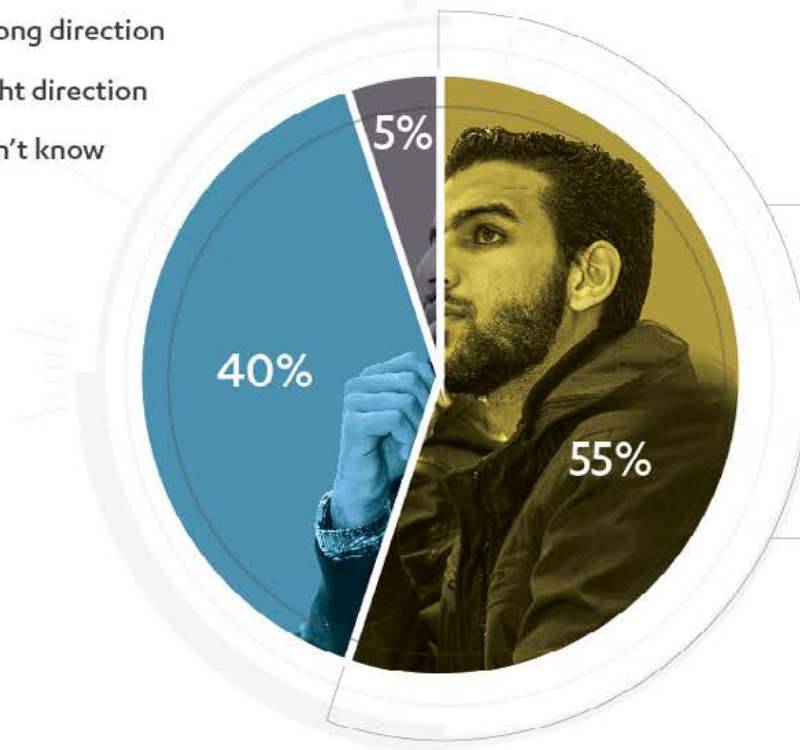
THE PAST 10 YEARS

**YOUTH SAY THE PAST DECADE –
SHAPED BY THE ARAB SPRING AND
DAESH – HAS LEFT THE MIDDLE
EAST DRIFTING OFF COURSE**

A majority of young Arabs, particularly in the Levant, say the region has moved in the wrong direction over the past decade

Would you say that over the past 10 years, things in the Arab world as a region have moved in the right direction or in the wrong direction?

- Wrong direction
- Right direction
- Don't know



% all respondents

Top 3 to say
'Wrong direction'

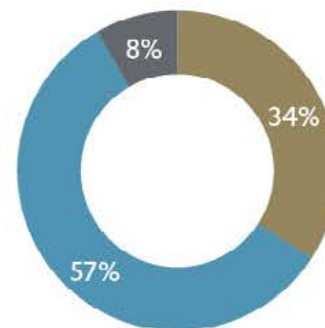
89%
Lebanon



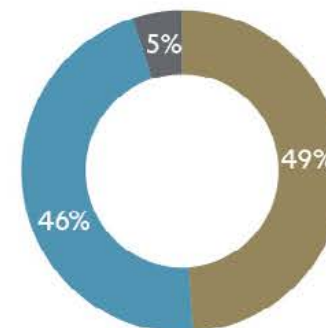
88%
Jordan



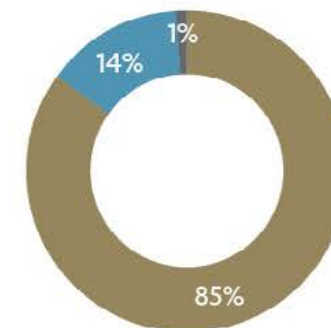
83%
Palestinian
Territories



GCC



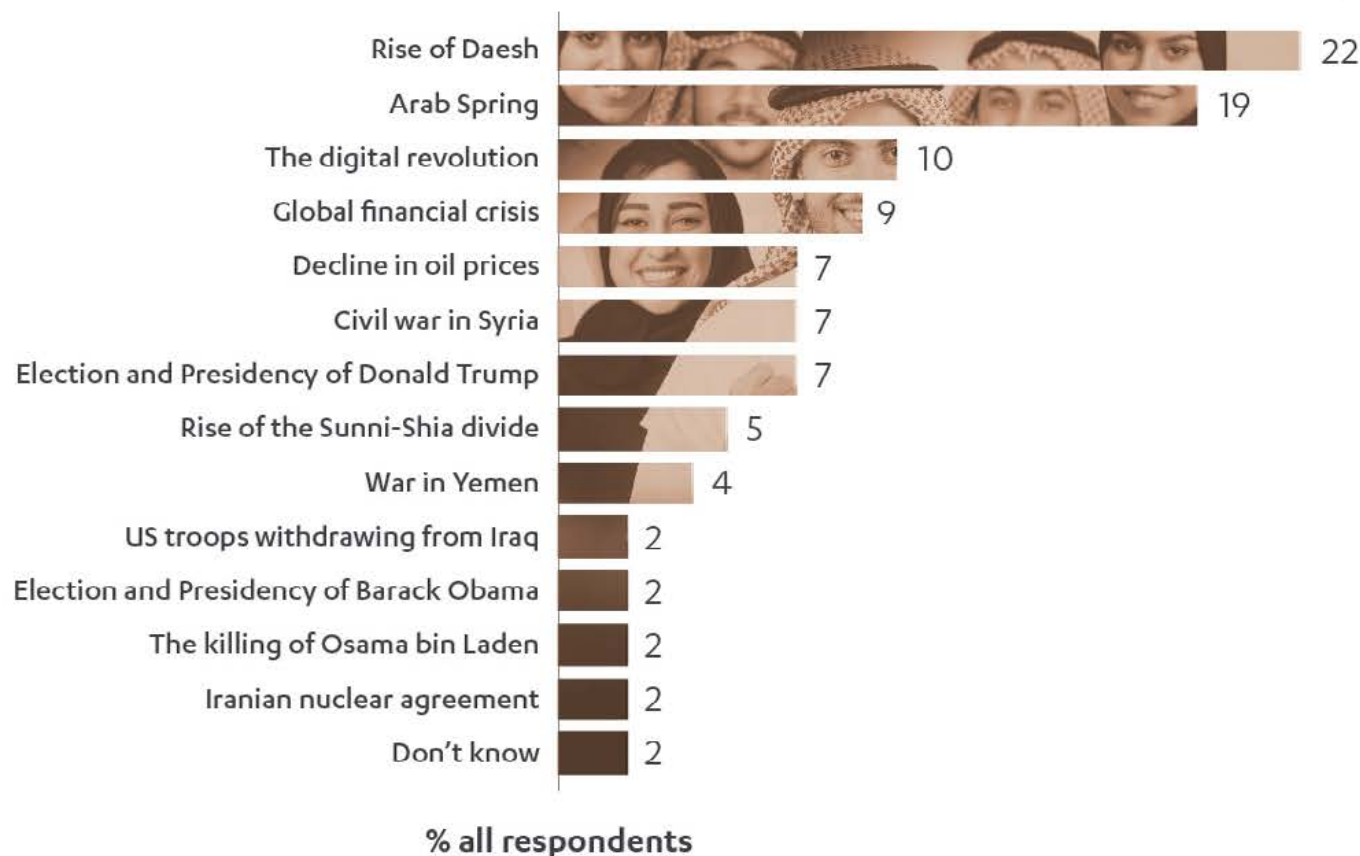
North Africa



Levant

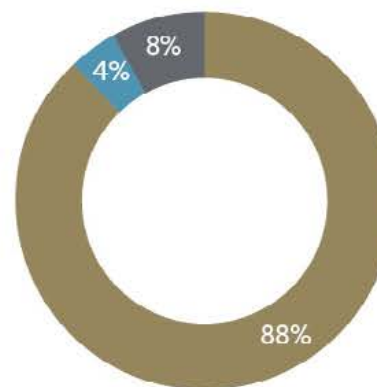
Arab youth say Daesh and the Arab Spring have had the biggest impact on the region over the past decade; both are seen to have impacted the region negatively

Which of the following events or developments that took place in the last 10 years in your view has had the biggest impact on the Arab world?

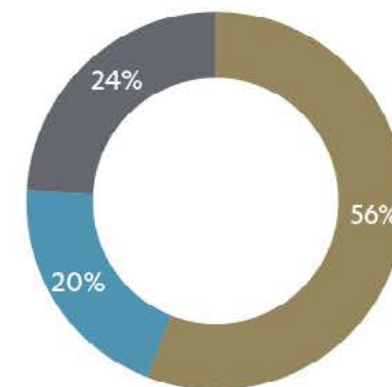


How positive or negative of an impact has this event or development had on the Arab world?

● Negative ● Positive ● Neutral



Rise of Daesh

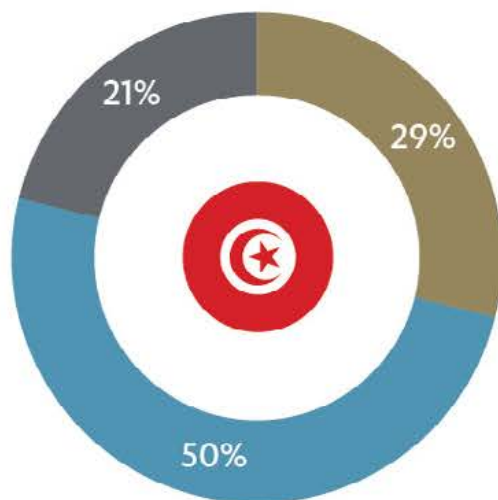


Arab Spring

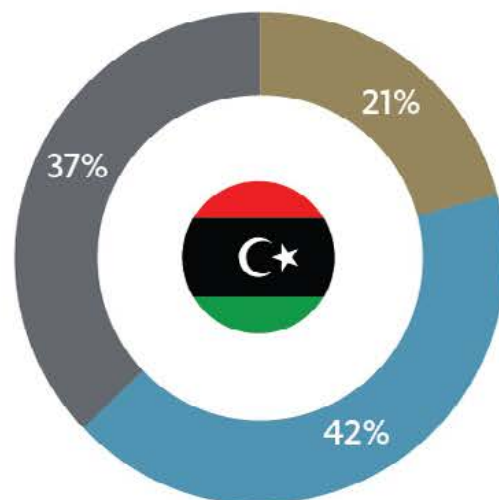
The impact of the Arab Spring is polarising even among youth living in the Arab Spring countries

How positive or negative of an impact has the Arab Spring had on the Arab world?

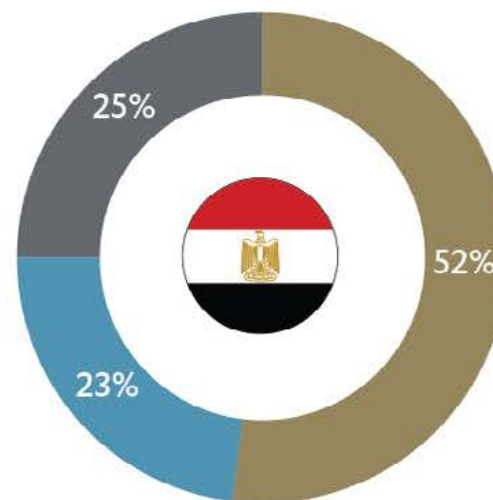
● Negative ● Positive ● Neutral



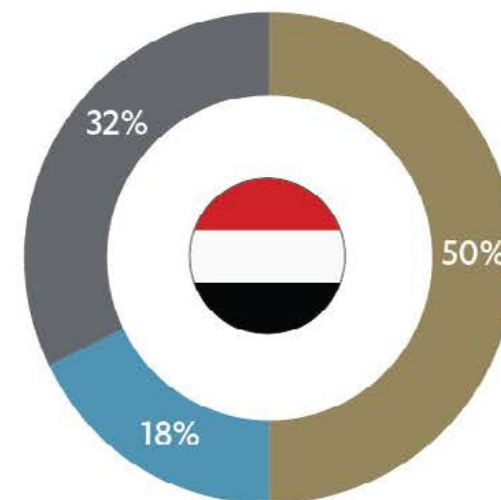
Tunisia



Libya



Egypt



Yemen



2

THE NEXT 10 YEARS

TO STEER THE REGION IN THE
RIGHT DIRECTION, ACTION IS
NEEDED ON JOBS, EDUCATION,
CORRUPTION AND THE FIGHT
AGAINST TERROR

Defeating terrorism, well-paying jobs, education reform, and fighting corruption are seen as the top priorities to move the region in the right direction

Now thinking about the next 10 years, which of the following, if any, are the most important things necessary for the Arab world to move in the right direction?

Top four priorities

Defeating
terrorist
organisations



Creating new,
well-paying
jobs



Modernising
the education
system

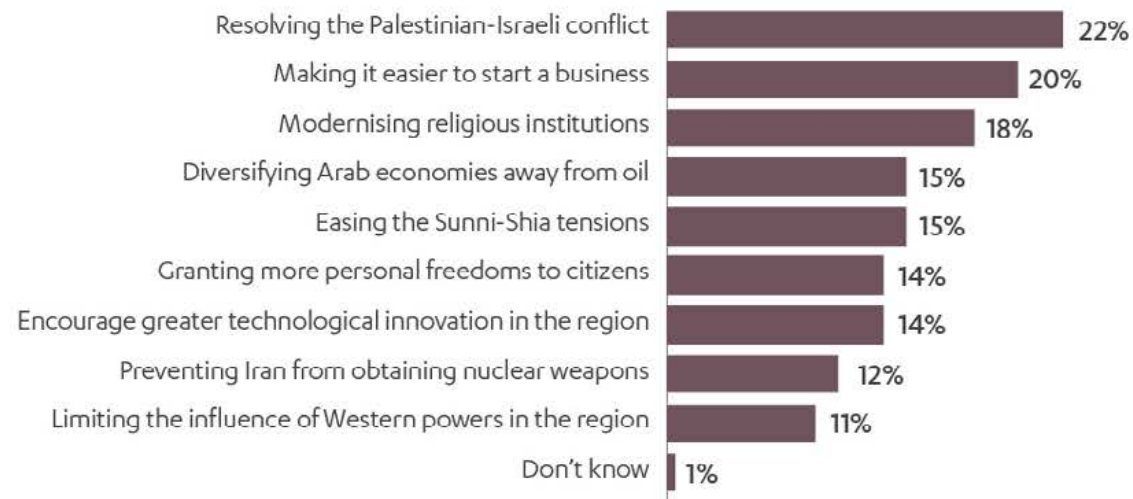


Cracking down
on government
corruption



% all respondents

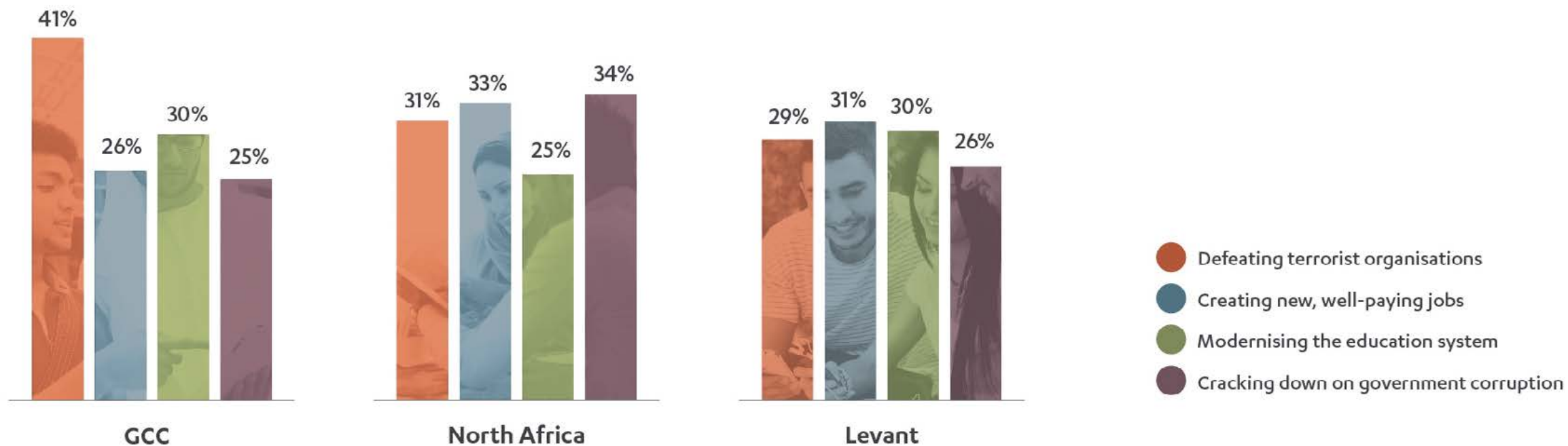
Other priorities



% all respondents

Defeating terrorism is the strongest priority among GCC youth, while young Arabs in North Africa are more likely to want the focus to be on fighting government corruption

Now thinking about the next 10 years, which of the following, if any, are the most important things necessary for the Arab world to move in the right direction?



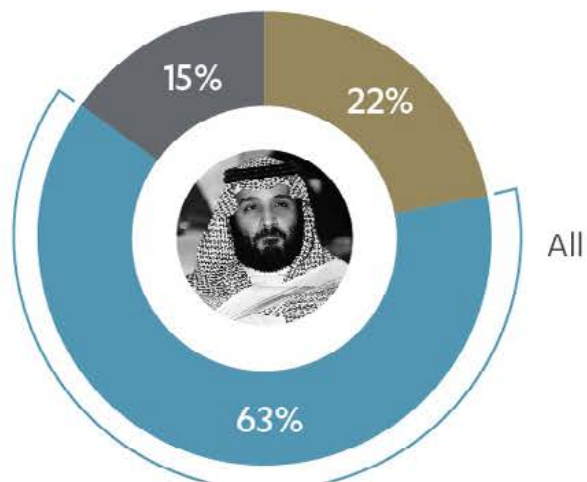


3

**YOUNG ARABS SEE SAUDI CROWN
PRINCE MOHAMMED BIN SALMAN
AS A STRONG LEADER WHO WILL
SHAPE THE NEXT DECADE**

Young Arabs express a high level of confidence in Saudi Crown Prince Mohammed bin Salman and his leadership

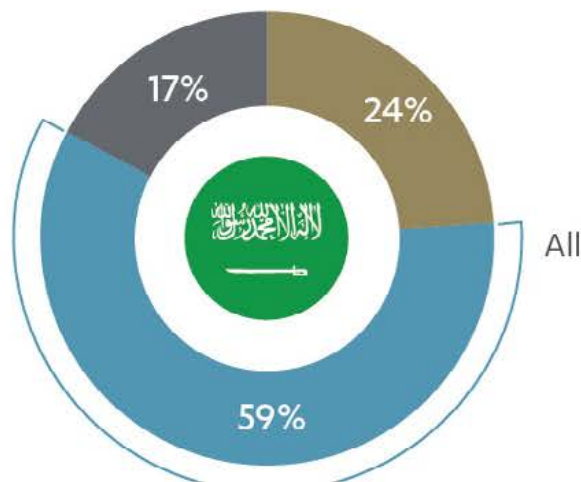
To what extent do you support or oppose the Saudi King's decision to appoint his son Mohammed bin Salman as the new Crown Prince?



KSA youth
91% say 'support'

Support Oppose Don't know

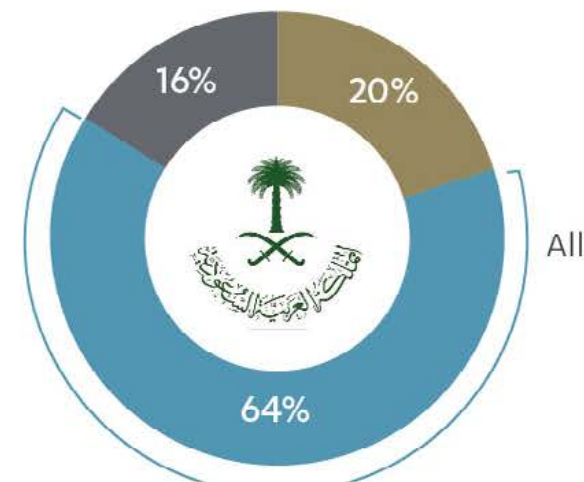
Do you think Mohammed bin Salman will take Saudi Arabia in the...?



KSA youth
90% say, 'right direction'

Right direction Wrong direction Don't know

How strong or weak of a leader do you think Mohammed bin Salman is?



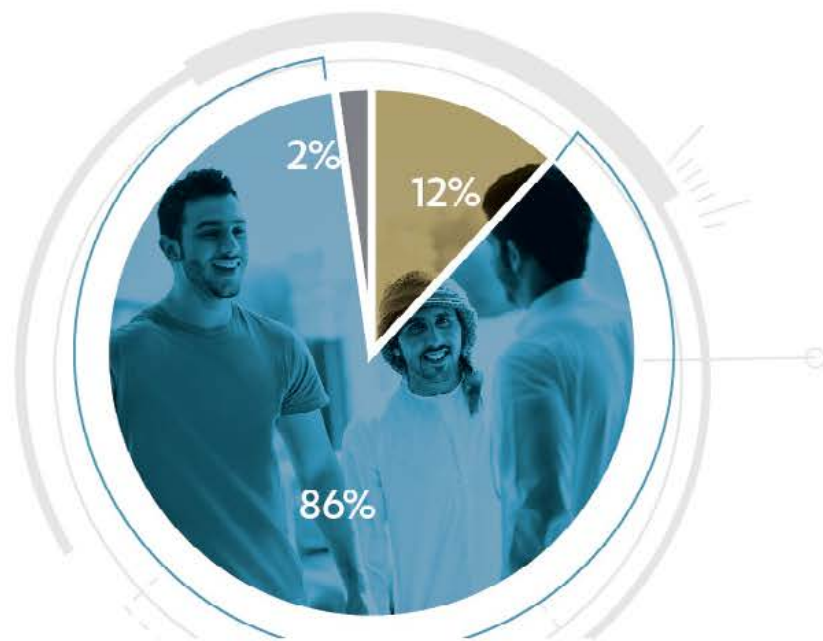
KSA youth
97% say, 'strong leader'

Strong Weak Don't know

Arab youth across the region overwhelmingly support Saudi Crown Prince Mohammed bin Salman's anti-corruption campaign

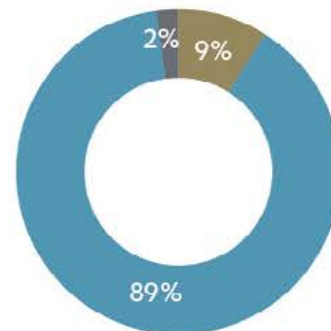
ASDA'A Burson-Marsteller
ARAB YOUTH SURVEY 2018
— arabyouthsurvey.com —

To what extent do you support or oppose the Saudi government's anti-corruption measures?

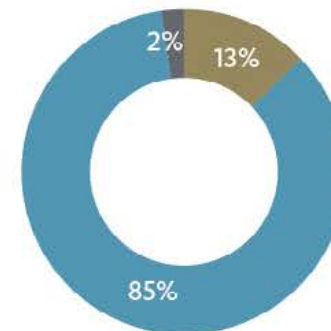


KSA Youth
94% 'support'

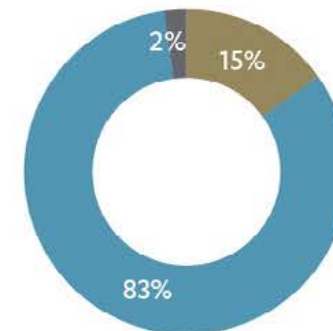
% all respondents



GCC



North Africa



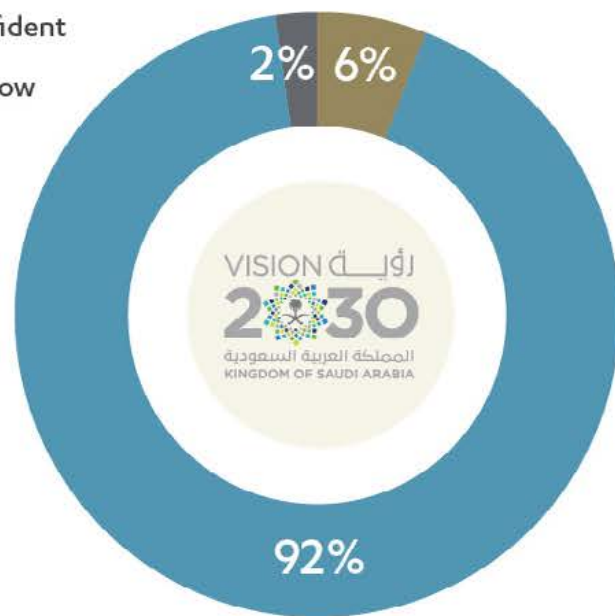
Levant

Support Oppose Don't know

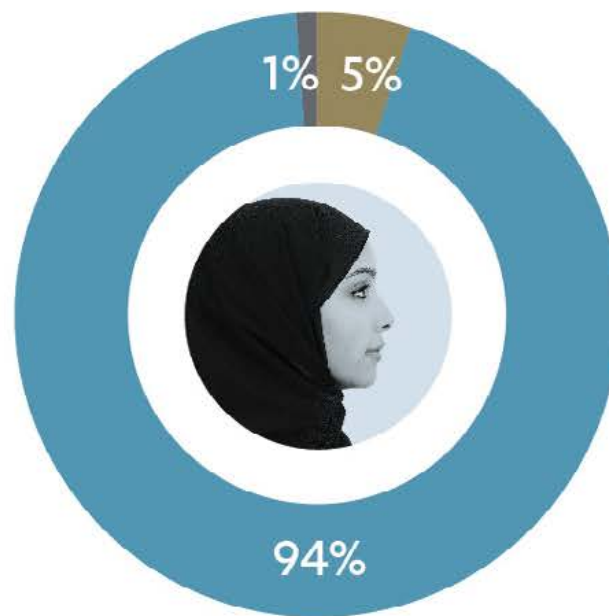
Young Saudis are highly confident that Saudi Crown Prince Mohammed bin Salman's Saudi Vision 2030 will be a success

How confident are you that the Saudi Vision 2030 will succeed in securing the future of the Saudi economy?

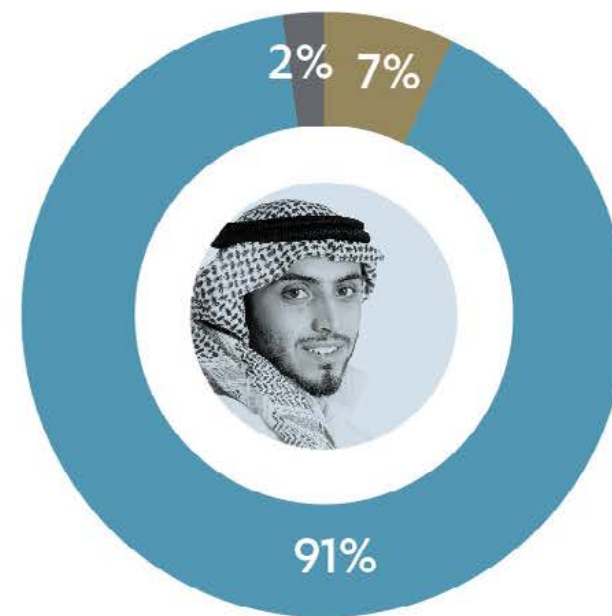
- Confident
- Not confident
- Don't know



Saudi Youth



Saudi Women

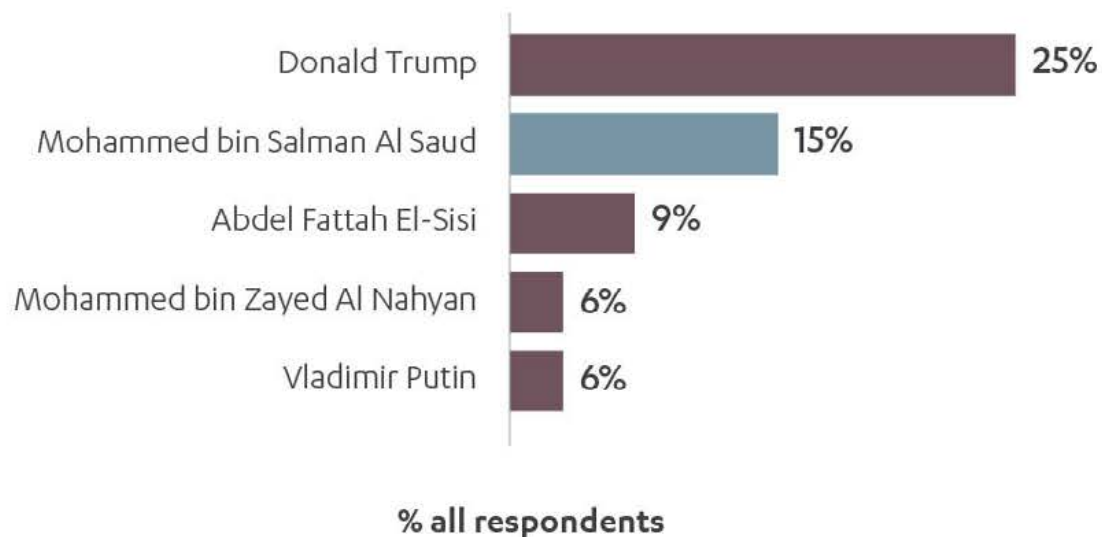


Saudi Men

Arab youth, particularly in the GCC, expect the Saudi Crown Prince to have a bigger impact on the region over the next decade than any other Arab leader

Now thinking about the next 10 years, which of the following individuals will have the biggest impact on the Arab world?

Top five across Arab world



Top three in GCC





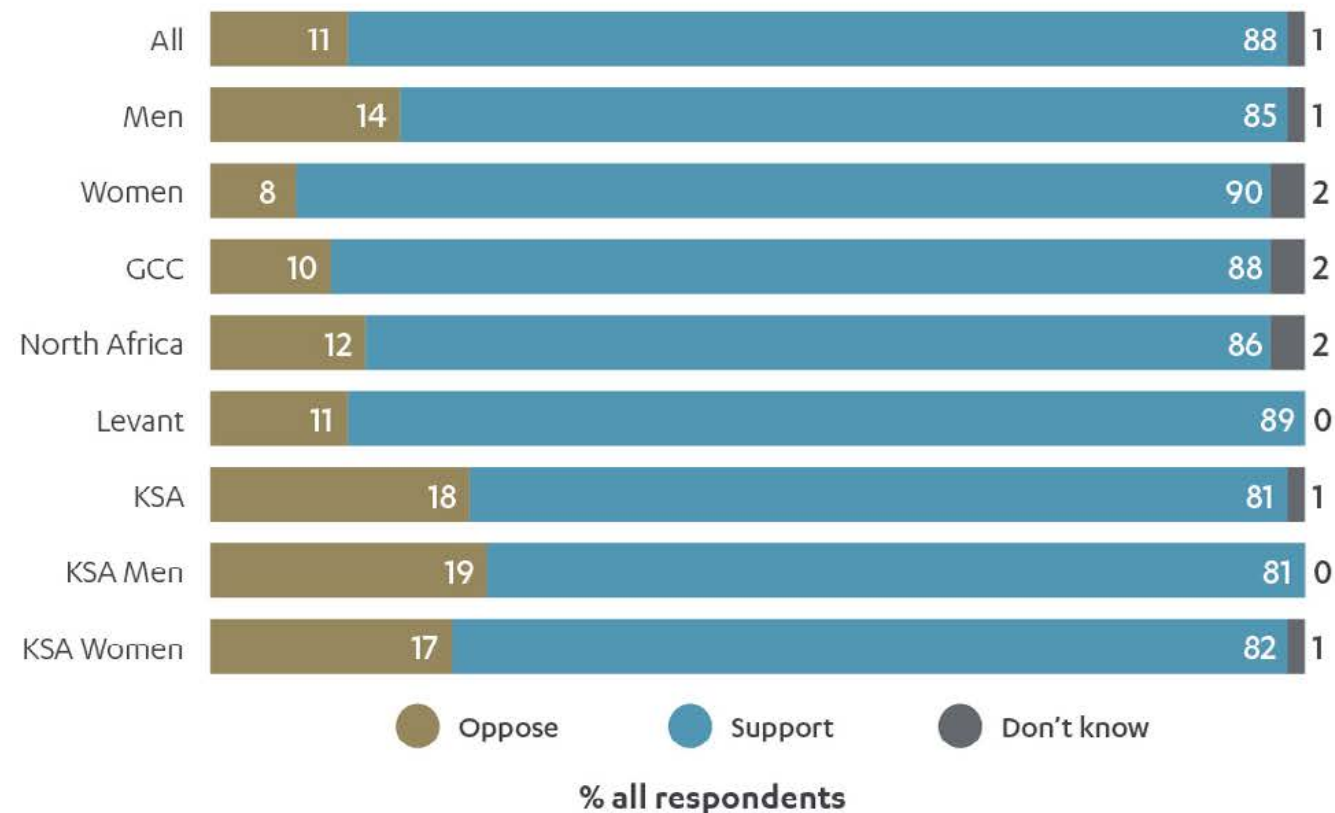
4

**ARAB YOUTH OVERWHELMINGLY
WELCOME THE MOVE TO ALLOW
WOMEN TO DRIVE IN SAUDI
ARABIA, BUT SAY MORE MUST BE
DONE TO ADDRESS WOMEN'S
RIGHTS THROUGHOUT THE REGION**

The Saudi government's decision to allow women to drive receives overwhelming support among Arab youth across gender and geographic lines

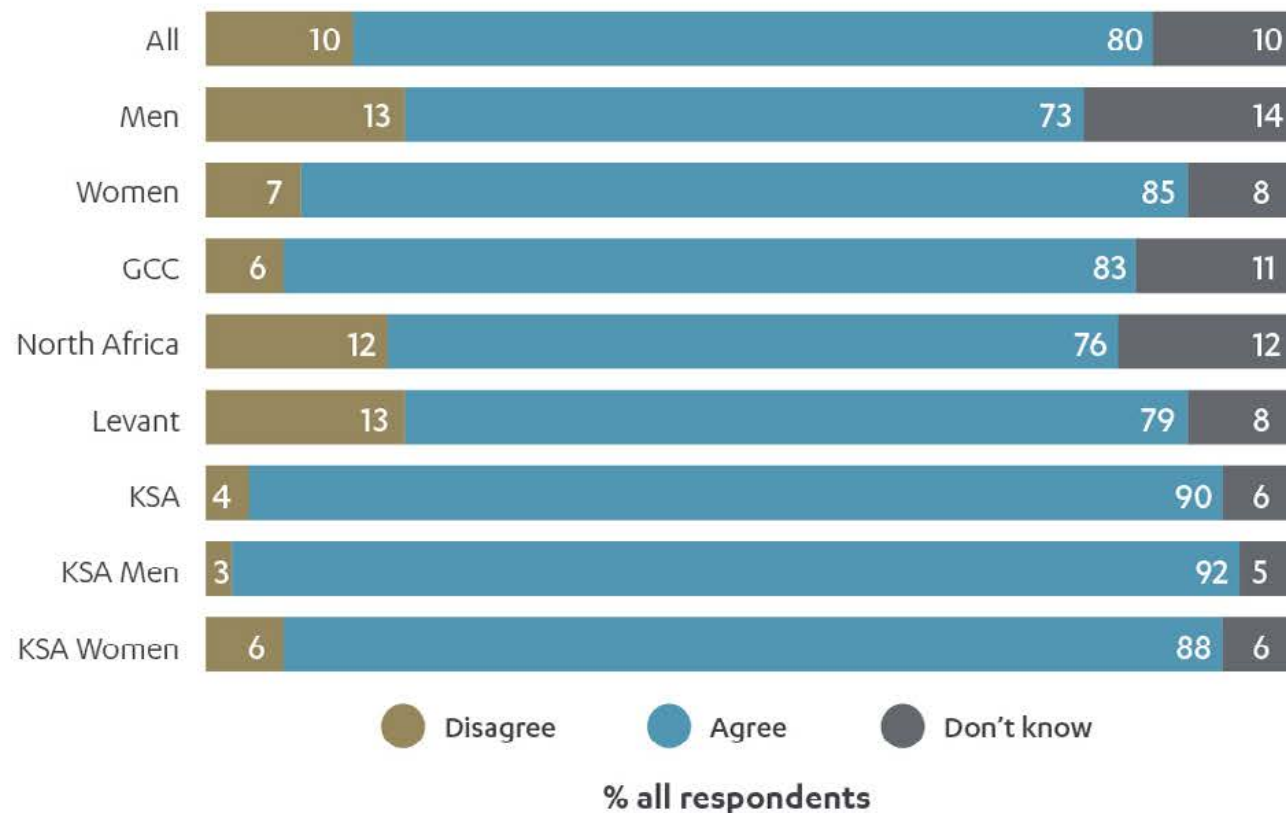
ASDA'A Burson-Marsteller
ARAB YOUTH SURVEY 2018
— arabyouthsurvey.com —

To what extent do you support or oppose the Saudi government's decision to allow women to drive cars?



However, a strong majority of young Arabs, particularly in Saudi Arabia, say more needs to be done on women's rights

On a scale from zero to ten, how strongly do you agree or disagree with the statement?
"Arab leaders should do more to improve the personal freedoms and human rights of women"



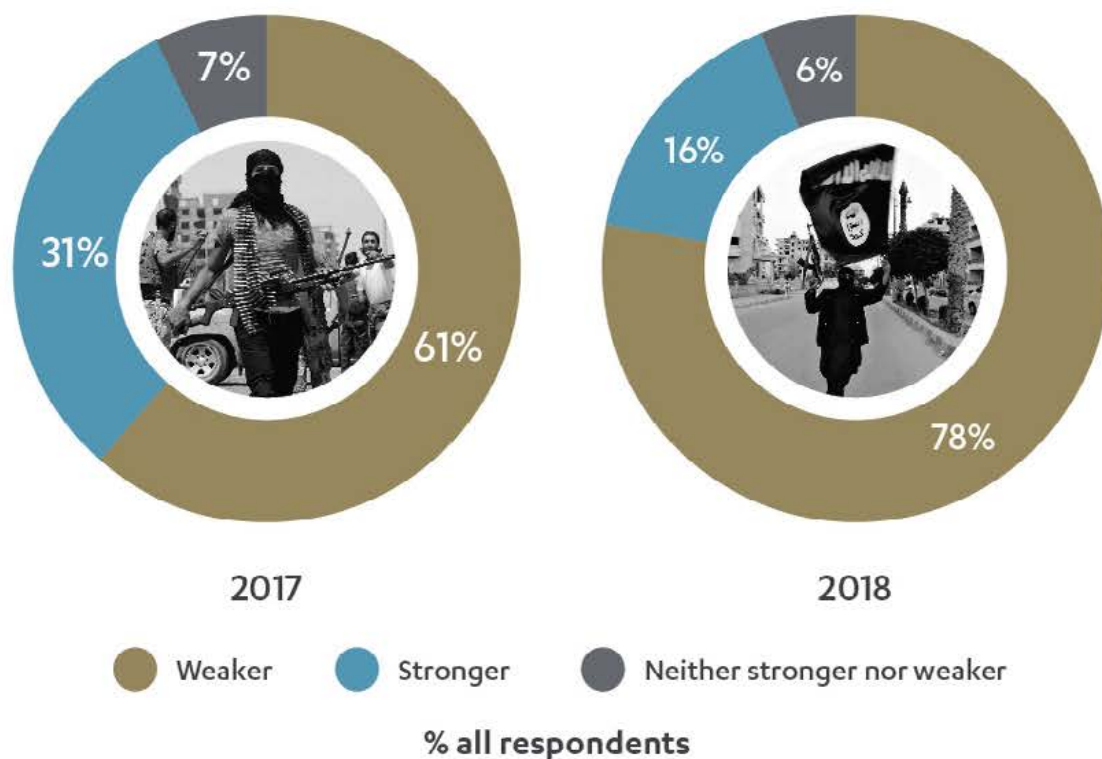


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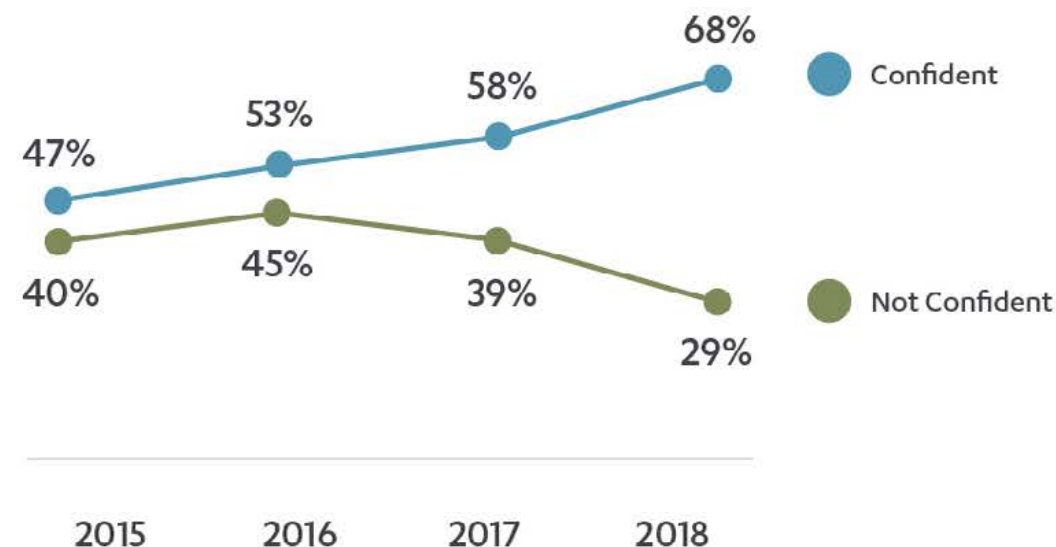
**YOUNG ARABS ARE CONVINCED
THAT DAESH – AND ITS IDEOLOGY
– WILL BE COMPLETELY DEFEATED**

Arab youth increasingly say Daesh is getting weaker while expressing a growing sense of confidence in their governments' ability to deal with the terrorist organisation

Thinking specifically about Daesh, over the past year, do you think Daesh has become ...

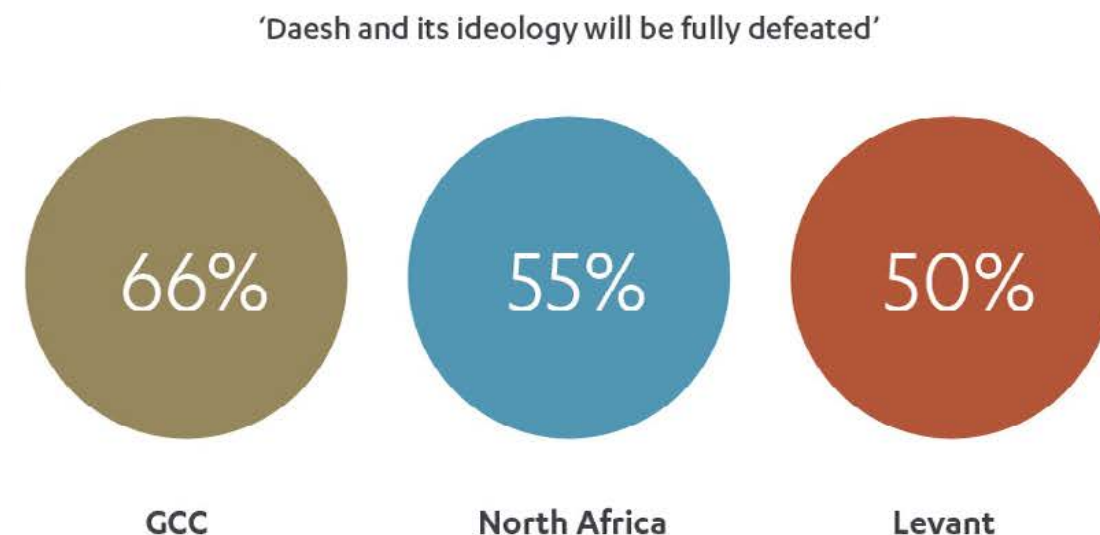


How confident are you in your national government's ability to deal with the threat of Daesh?



A majority of young Arabs say Daesh and its ideology will be fully defeated

What do you think is the future of Daesh?





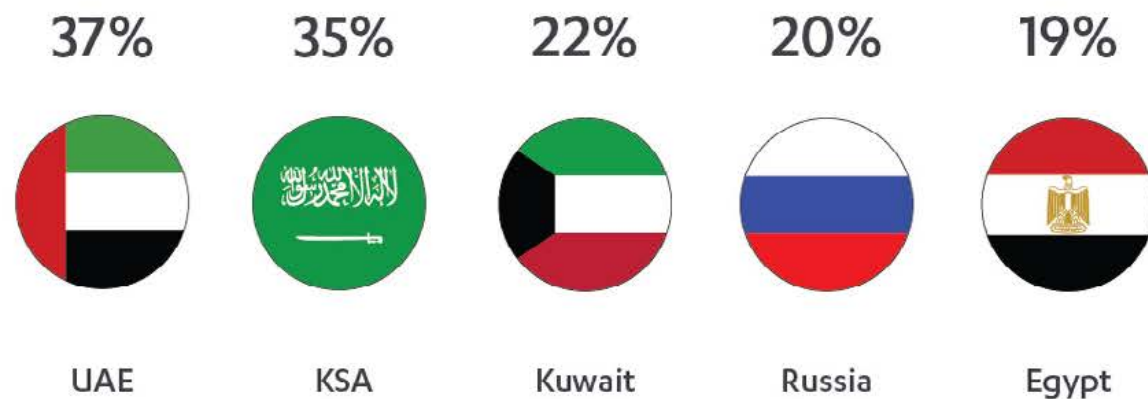
6

**YOUTH ACROSS THE MIDDLE EAST
INCREASINGLY VIEW THE US AS
AN ADVERSARY, WHILE RUSSIA
CEMENTS ITS POSITION AS THE
TOP NON-ARAB ALLY**

While the UAE and Saudi Arabia continue to be seen as the biggest allies by youth, the US falls to number 11, finding itself out of the top five for the first time and replaced by Russia as the top non-Arab ally

Now thinking about your country and its relations with other countries, who would you say is your country's biggest ally? (Showing top five)

Top five country allies - 2018

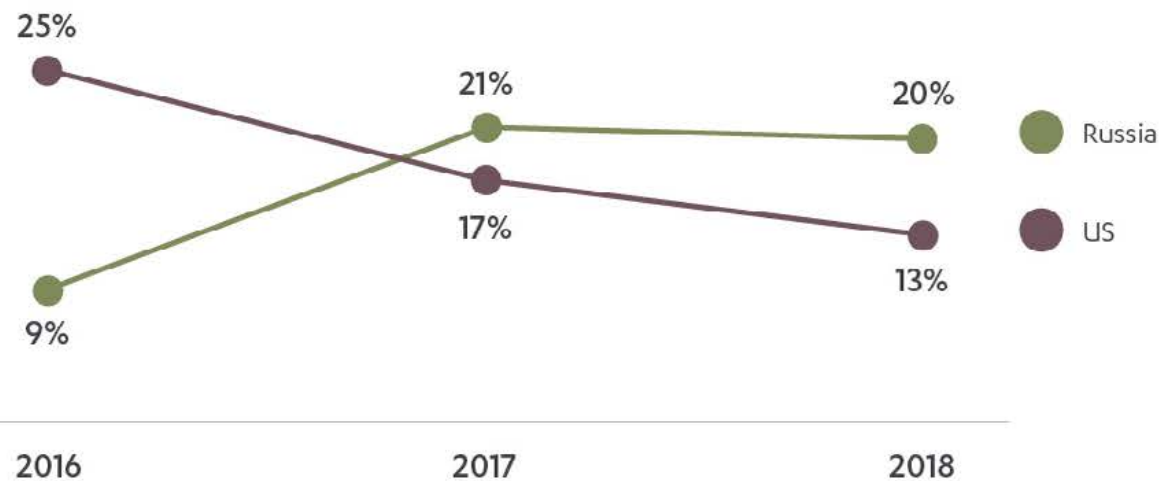


% all respondents

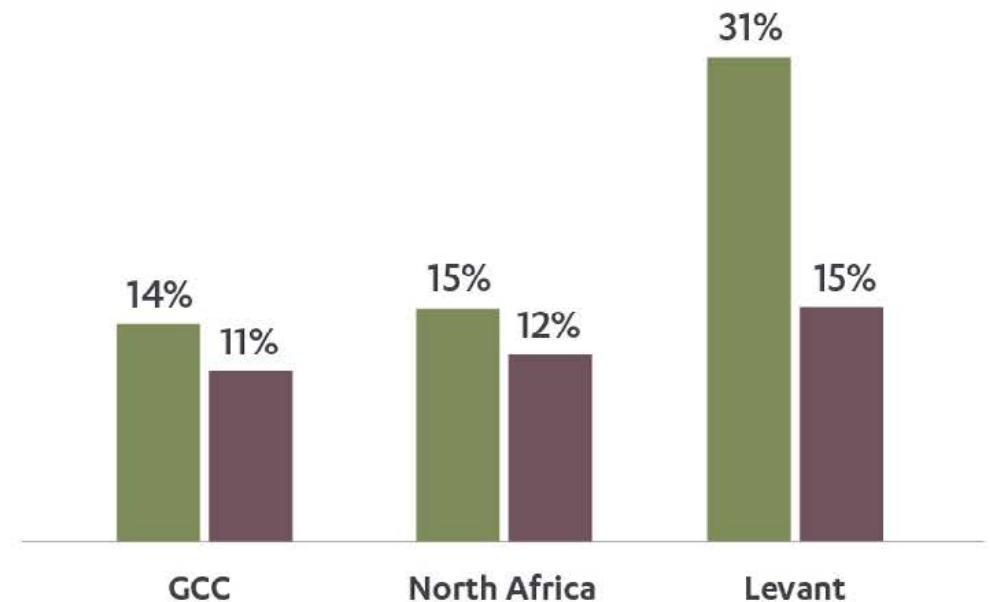
Top five country allies					
2012	2013	2014	2015	2016	2017
KSA	KSA	KSA	KSA	KSA	UAE
UAE	UAE	UAE	US	UAE	KSA
Qatar	Qatar	Qatar	UAE	US	Russia
Kuwait	Kuwait	Kuwait	Qatar	Egypt	Qatar
US	US	US	France	UK	US

Russia has benefited from the downfall of America's image among young Arabs, solidifying its position as the top non-Arab ally

Now thinking about your country and its relations with other countries, who would you say is your country's biggest ally?



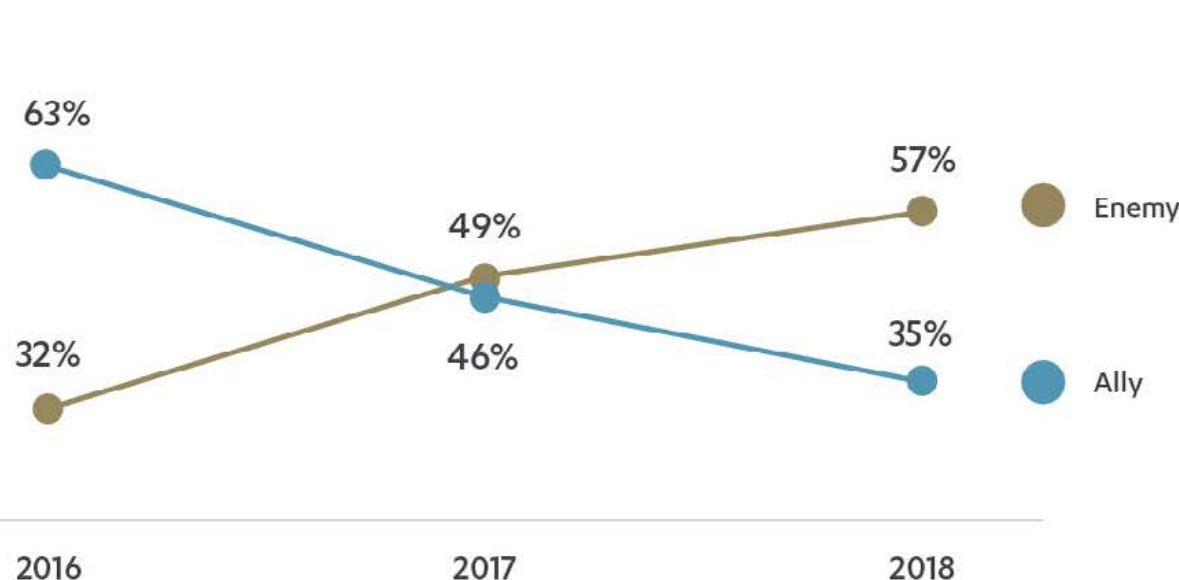
% all respondents



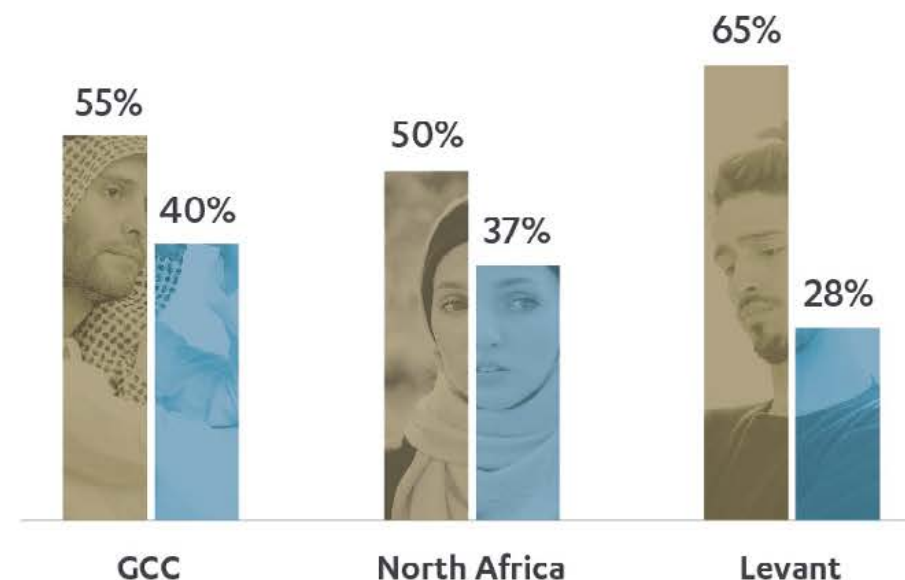
2018 data

Over the past two years, there has been a dramatic shift in Arab youth's perceptions of the US, with a solid majority now saying America is an adversary of their country

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



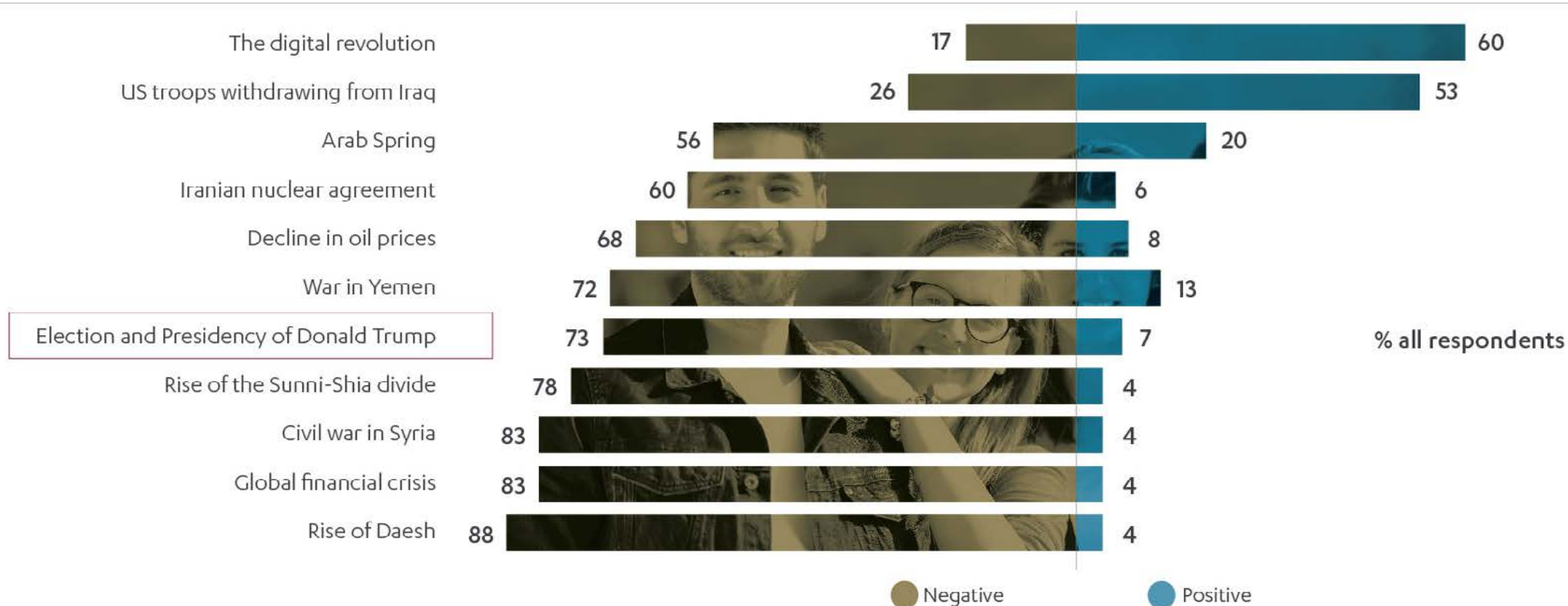
% all respondents



2018 data

Three-quarters of young Arabs view the impact of Trump's presidency on the region as negative

How positive or negative of an impact has this event or development had on the Arab world?





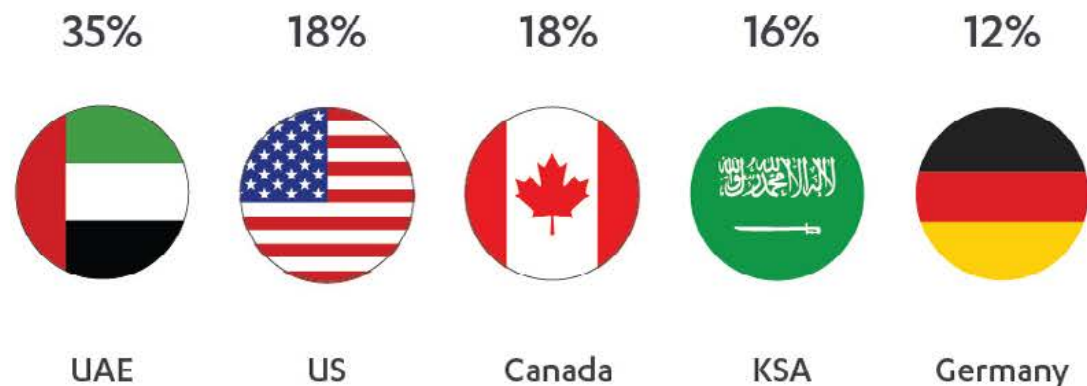
7

**THE UAE REMAINS THE TOP
COUNTRY ARAB YOUTH WANT TO
LIVE IN, AND WANT THEIR OWN
COUNTRIES TO EMULATE**

Young Arabs view the UAE as the top country to live in for the seventh year running, far surpassing other countries

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

Top five countries to live in - 2018



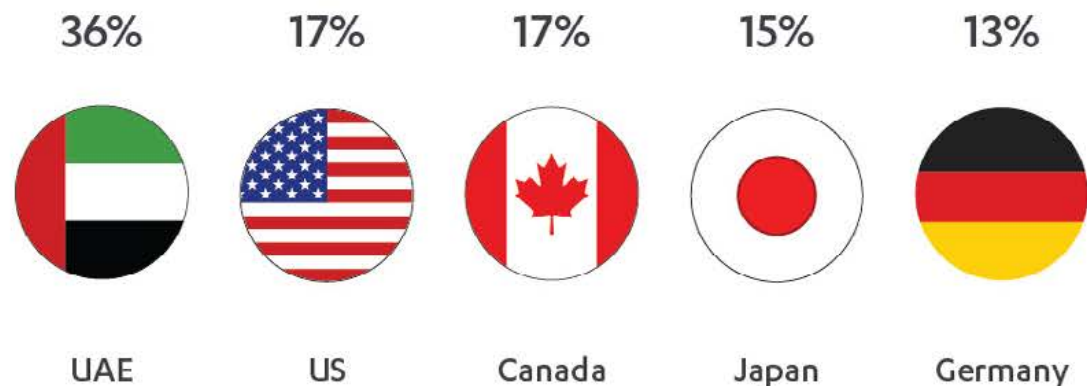
% all respondents

Top five countries to live in					
2012	2013	2014	2015	2016	2017
UAE	UAE	UAE	UAE	UAE	UAE
France	France	US	US	US	US
US	US	UK	Germany	Germany	KSA
Turkey	Turkey	KSA	Canada	KSA	Canada
KSA	KSA	Qatar	Qatar	Canada	Germany

The UAE also remains the country young Arabs are most likely to point to for their own country to emulate

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

Top five countries to emulate - 2018



% all respondents

Top five countries to emulate					
2012	2013	2014	2015	2016	2017
UAE	UAE	UAE	UAE	UAE	UAE
Turkey	France	US	US	US	US
KSA	US	Qatar	Germany	Germany	Canada
Qatar	Turkey	KSA	Canada	France	Germany
	China	UK	France	UK	KSA

As in previous years, safety, security and career opportunities are most widely associated with the UAE

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

Top three associations with the UAE



Safe and secure



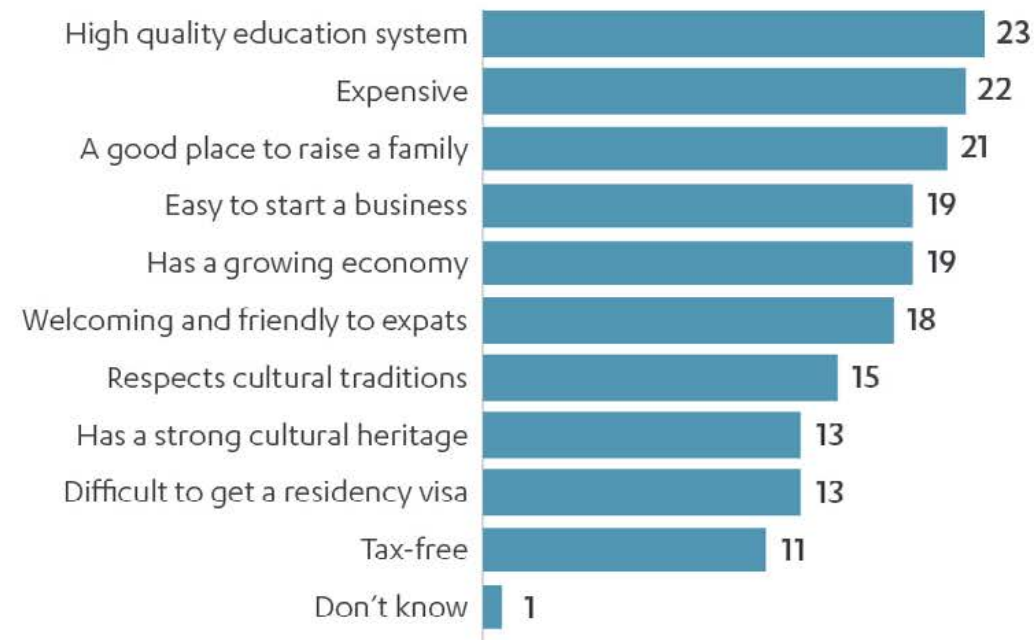
Generous salary packages



Wide range of work opportunities

% all respondents

Other associations with the UAE



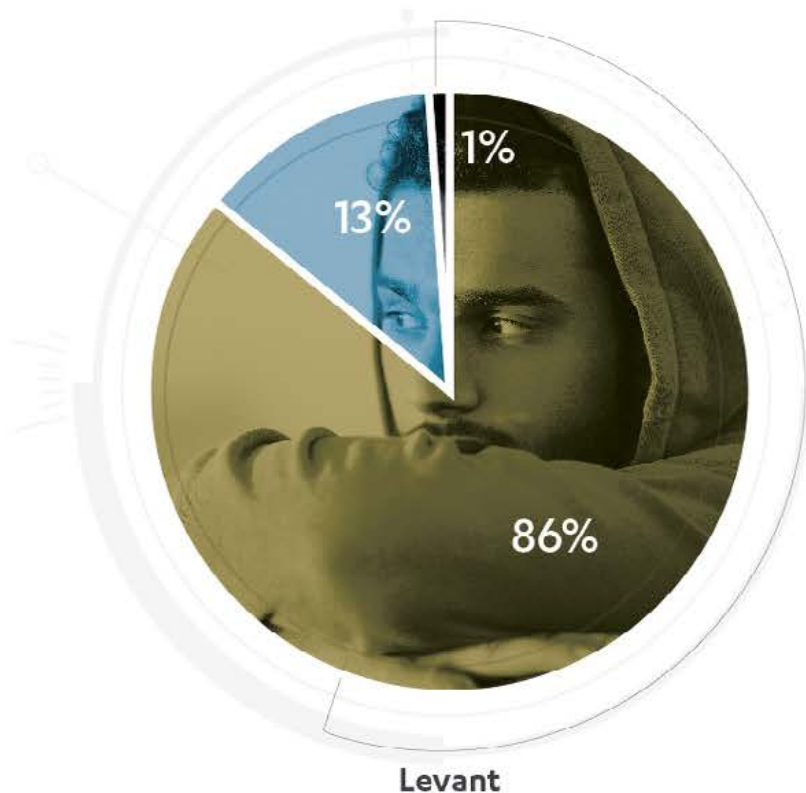


8

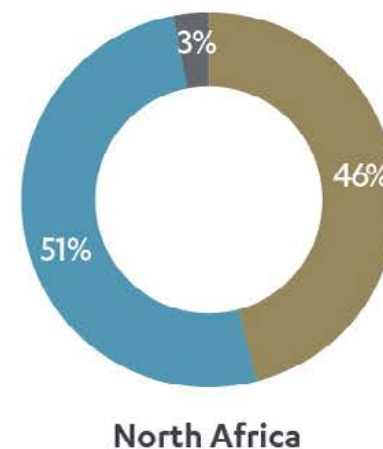
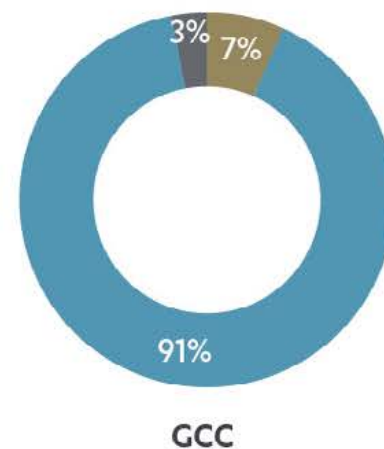
**YOUTH IN THE LEVANT HAVE AN
INCREASINGLY BLEAK OUTLOOK
COMPARED WITH PEERS IN NORTH
AFRICA AND THE GULF STATES**

Young people in the Levant are significantly more pessimistic than young Arabs in the GCC and North Africa

Thinking about the past 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?

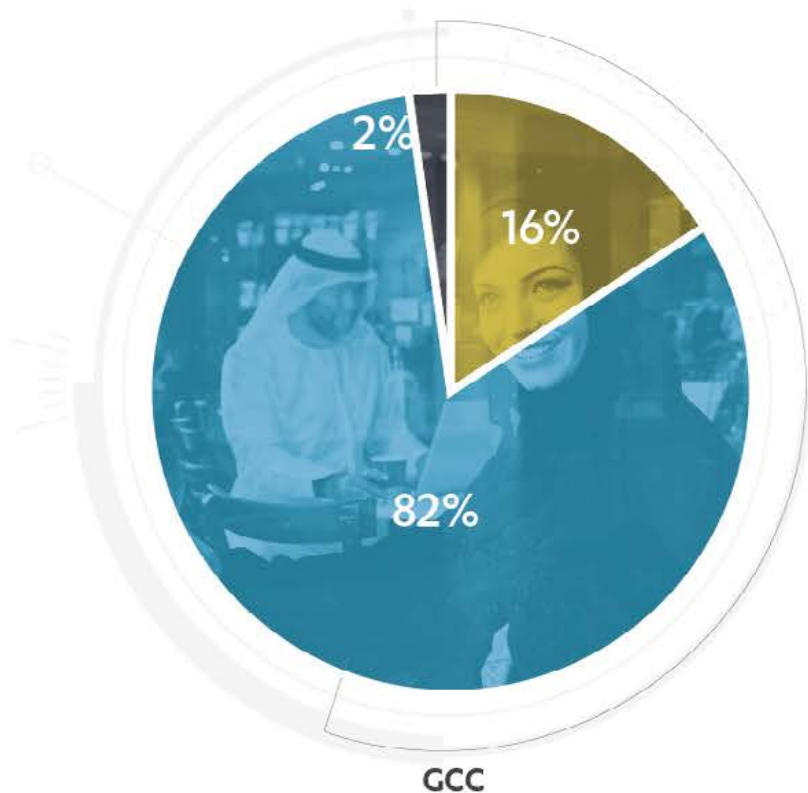


- Right direction
- Wrong direction
- Don't know

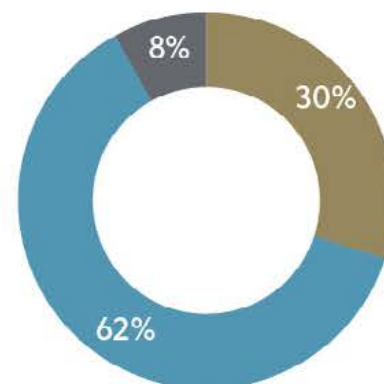


Young people in the GCC are markedly more optimistic on the future than their counterparts in the Levant and North Africa

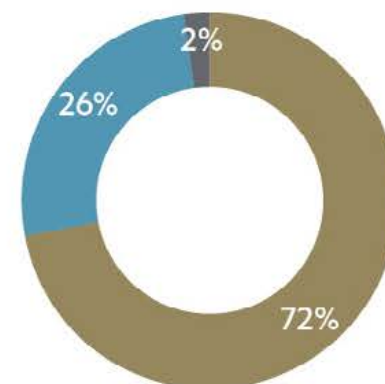
Which of the following do you agree with?
“Our best days are...”



● Ahead of us
● Behind us
● Don't know



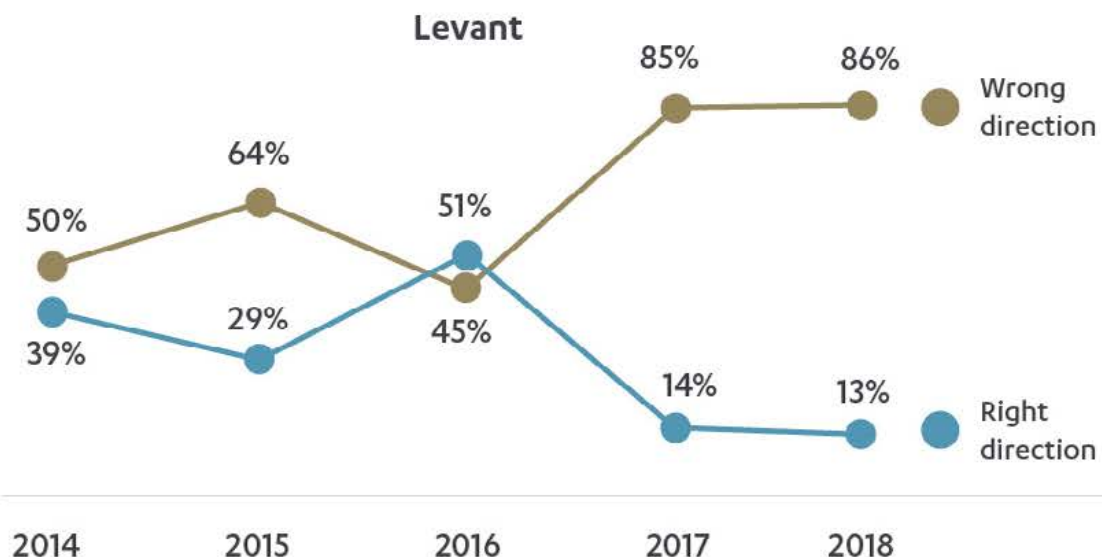
North Africa



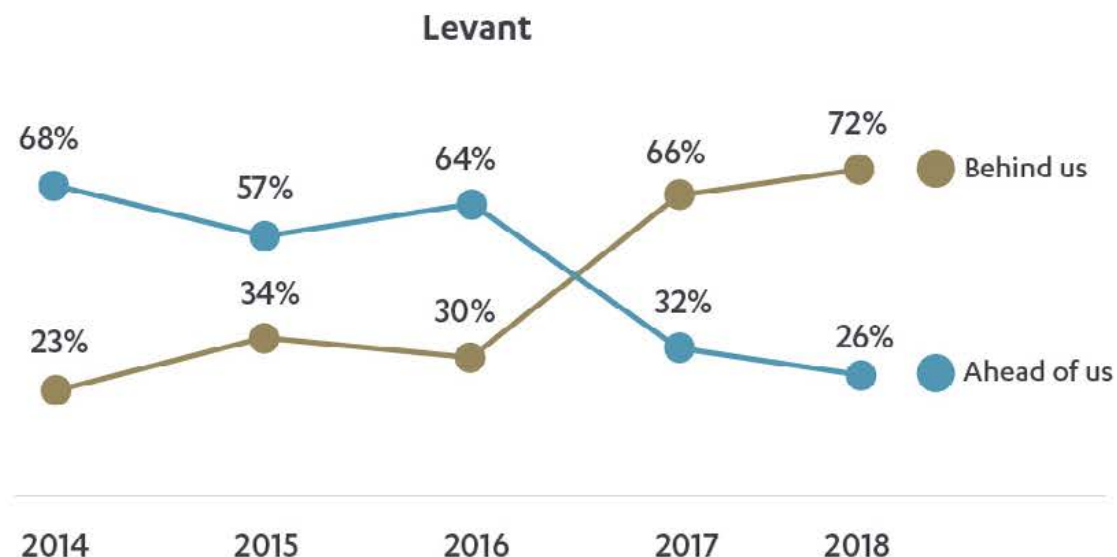
Levant

Youth's outlook in the Levant has turned increasingly bleak, particularly over the past two years

Thinking about the past 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?



Which of the following do you agree with?
“Our best days are...”



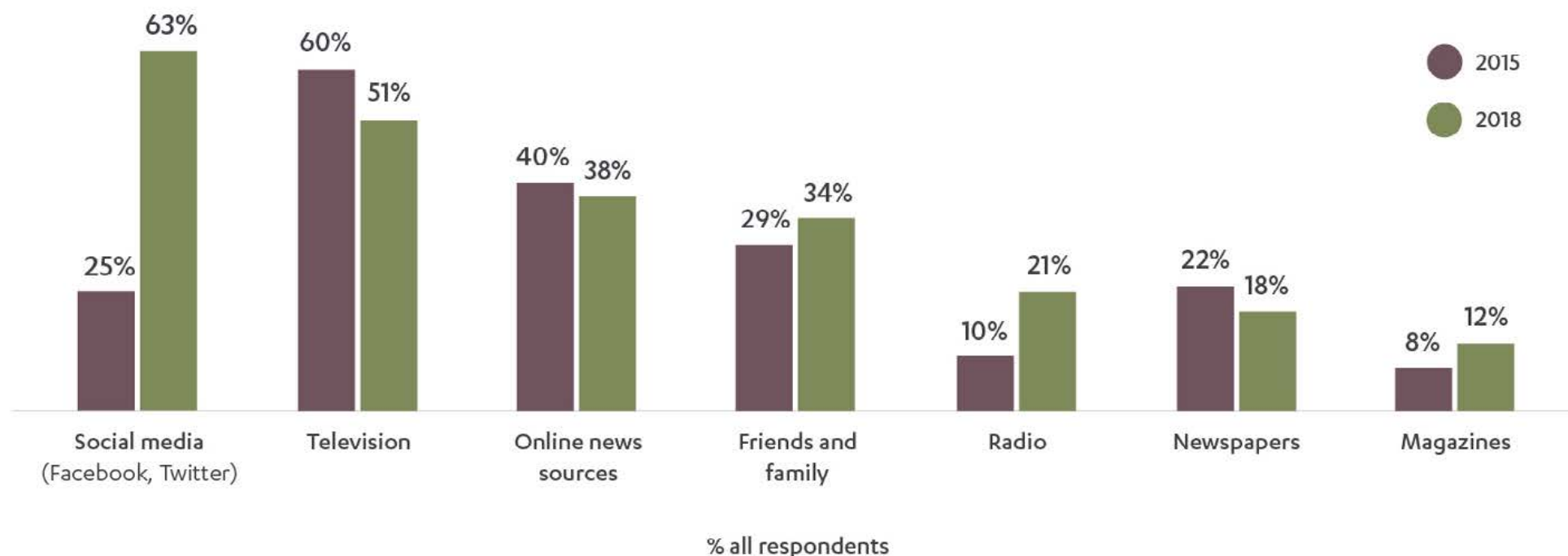


9

**WHILE YOUNG ARABS
INCREASINGLY TURN TO SOCIAL
MEDIA FOR THEIR NEWS, THEY SEE
CNN AS THE MOST TRUSTED AND
AL JAZEERA AS THE LEAST TRUSTED
NEWS SOURCES**

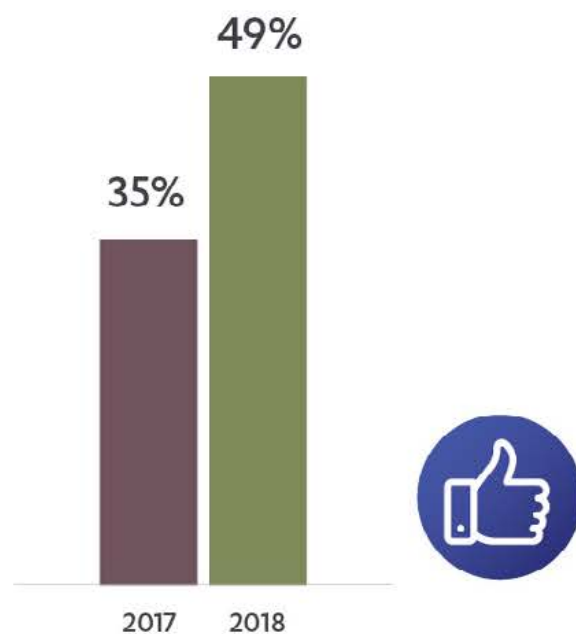
For the first time more young Arabs say they get their news on social media than TV, marking a major shift since 2015

Where do you get your news?

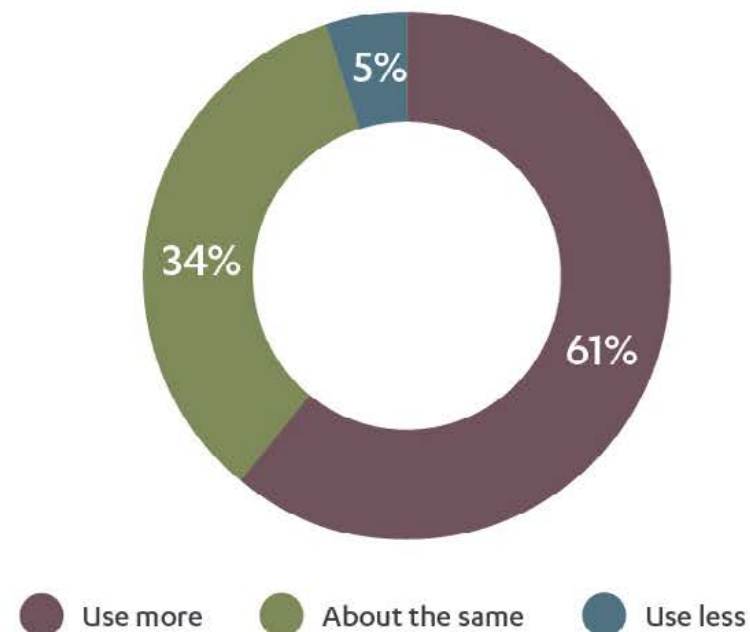


Facebook's influence among Arab youth continues to grow, with half now saying they get their news on Facebook daily

How often do you get your news on Facebook?
(Showing daily)



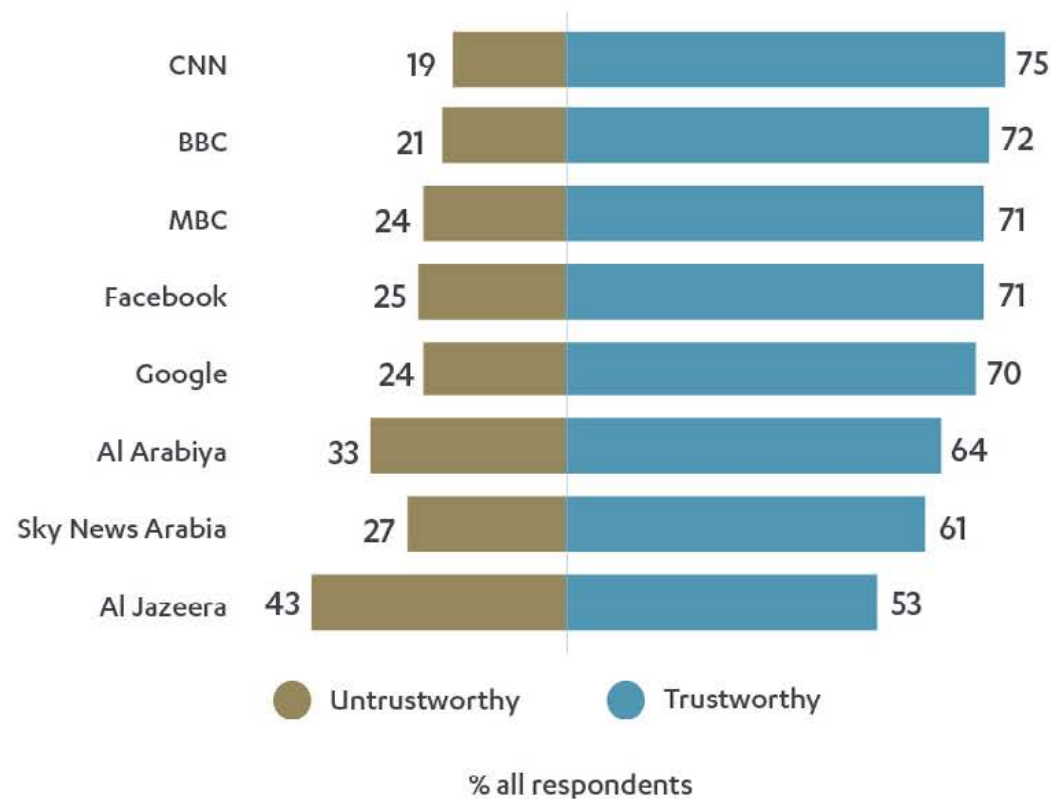
Compared with a year ago, would you say you use Facebook more, less, or about the same?



% all respondents

Young Arabs view CNN as the most trusted and Al Jazeera as the least trusted news sources

How trustworthy do you think is each of the following sources of news?



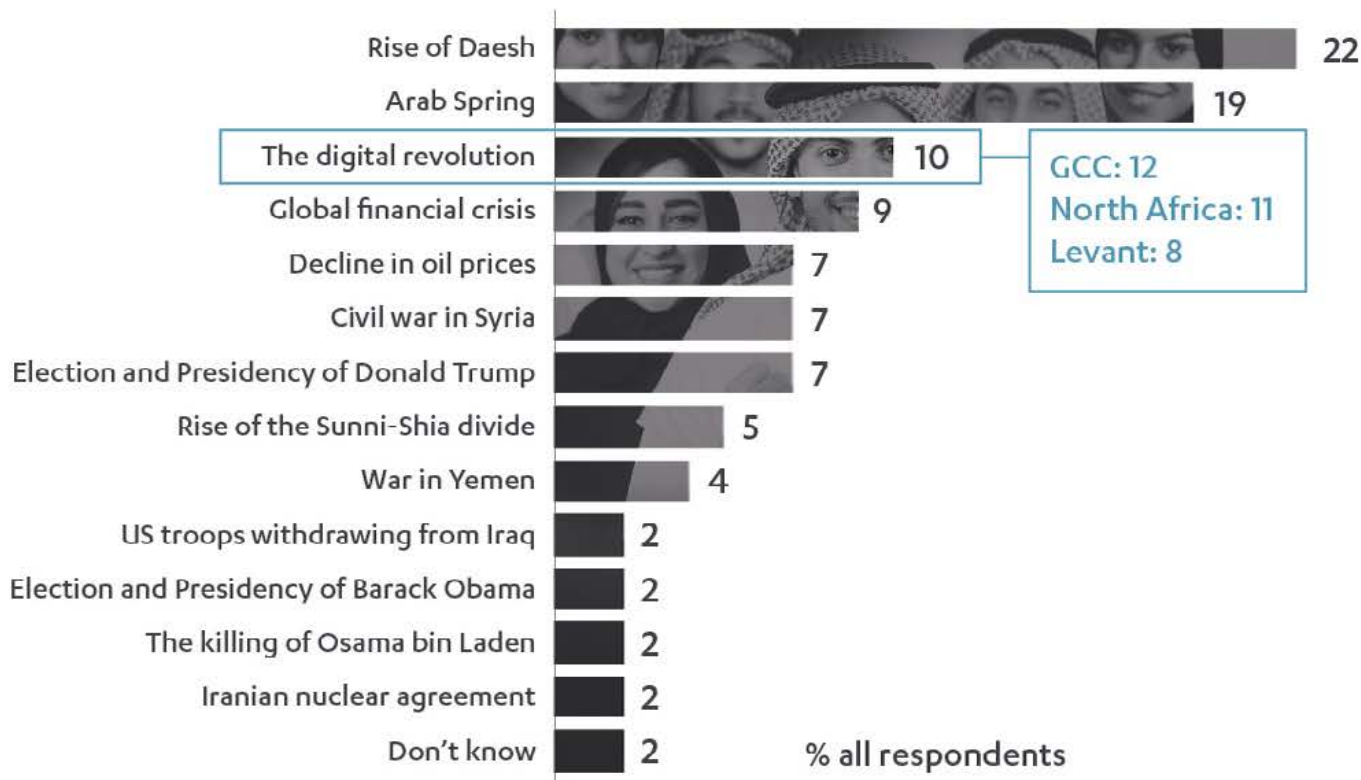


10

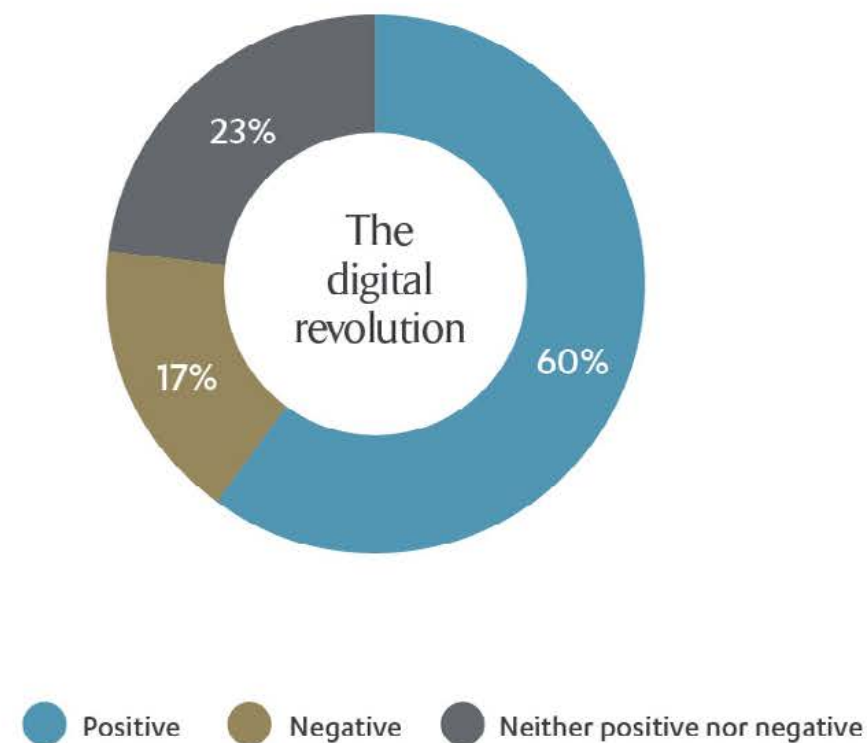
**INSPIRED BY THE DIGITAL
REVOLUTION, FUTURE ARAB
ENTREPRENEURS TURN TO THE
TECH SECTOR, WHICH OFFERS
PLENTIFUL OPPORTUNITIES
IN THE REGION**

Young Arabs view the digital revolution as an important development that has shaped the region over the past decade

Which of the following events or developments that took place in the past 10 years in your view has had the biggest impact on the Arab world?

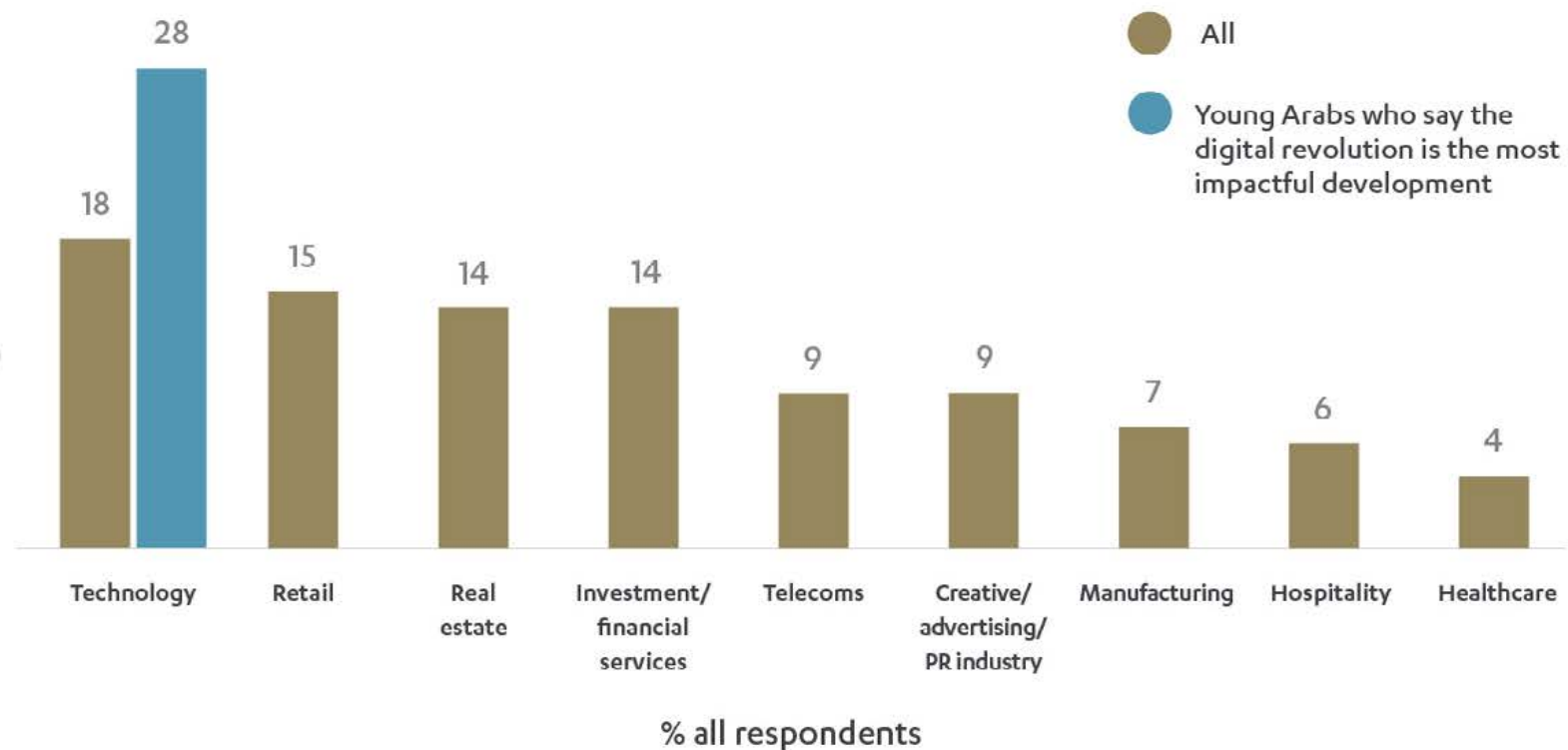


How positive or negative of an impact has this event or development had on the Arab world?



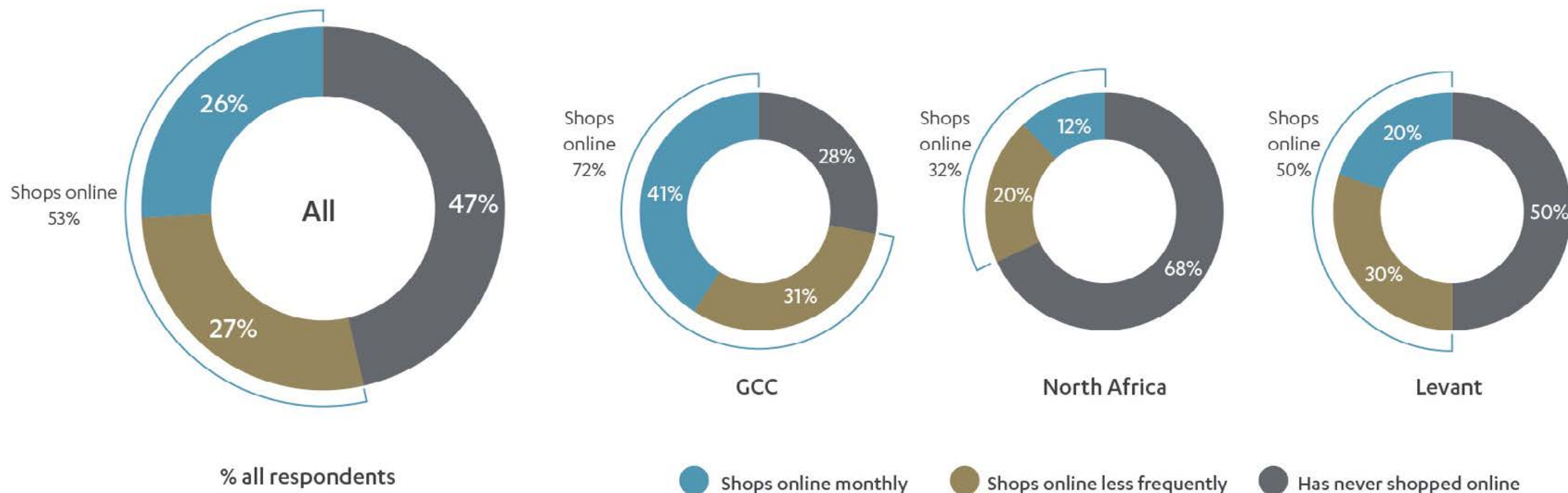
Technology is seen as the top sector among potential young Arab entrepreneurs, particularly those who say the digital revolution has had the biggest impact over the past decade

In which industry would you like to set up your business?



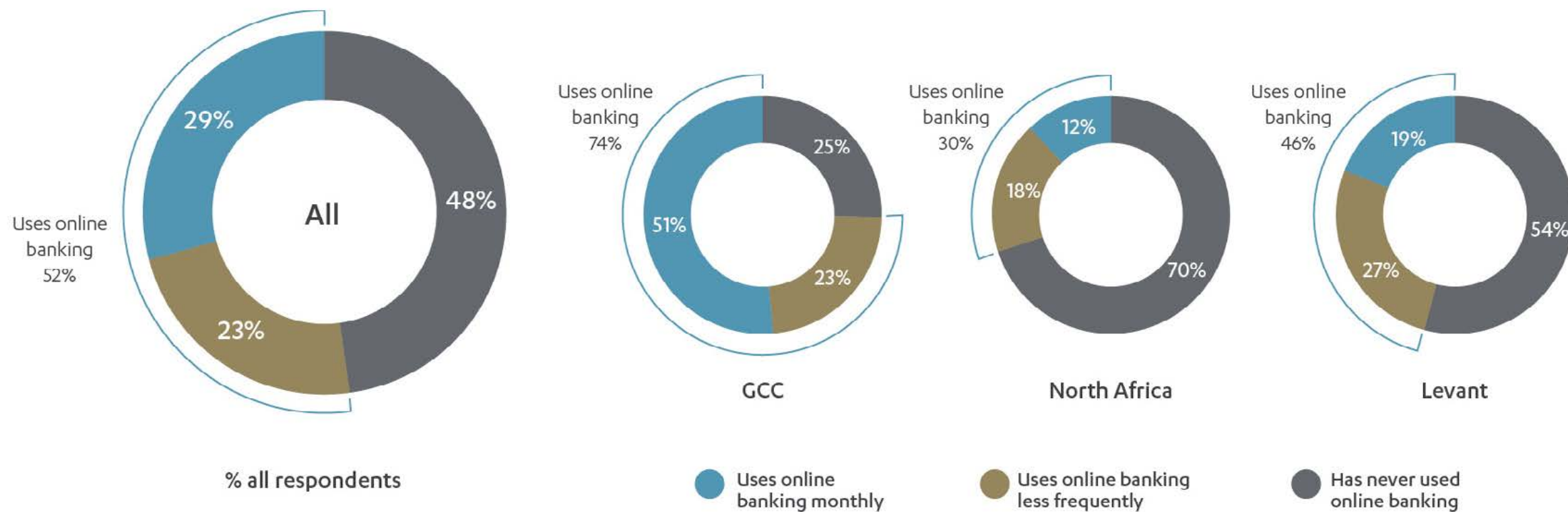
More than half of young Arabs say they shop online

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



Online banking is another technology advance that more than half of young Arabs use

How frequently, if at all, do you use online banking?



TOP 10 FINDINGS



Top 10 Findings:

1

Youth say the past decade – shaped by the Arab Spring and Daesh – has left the Middle East drifting off course

2

To steer the region in the right direction, action is needed on jobs, education, corruption and the fight against terror

3

Young Arabs see Saudi Crown Prince Mohammed bin Salman as a strong leader who will shape the next decade

4

Arab youth overwhelmingly welcome the move to allow women to drive in Saudi Arabia, but say more must be done to address women's rights throughout the region

5

Young Arabs are convinced that Daesh – and its ideology – will be completely defeated



Top 10 Findings:

6

Youth across the Middle East increasingly view the US as an adversary, while Russia cements its position as the top non-Arab ally

7

The UAE remains the top country Arab youth want to live in, and want their own countries to emulate

8

Youth in the Levant have an increasingly bleak outlook compared with peers in North Africa and the Gulf States

9

While young Arabs increasingly turn to social media for their news, they see CNN as the most trusted and Al Jazeera as the least trusted news sources

10

Inspired by the Digital Revolution, future Arab entrepreneurs turn to the tech sector, which offers plentiful opportunities in the region

10 YEARS OF
ARAB YOUTH
SURVEY

A DECADE OF HOPES & FEARS

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