





10 YEARS OF ARAB YOUTH SURVEY A

#ArabYouthSurvey

DECADE OF HOPES&FEARS

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		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

_____ 2017 / January _____

Donald Trump is officially sworn in as the 45th President of the United States

February _____

Car bomb in Baghdad kills at least 48, Daesh claims responsibility; it is third attack in 3 days

March ____

- Trump signs revised executive order removing Iraq from 'travel ban' list
- UK invokes article 50 of the Lisbon Treaty, formally triggering Brexit in March 2019

- Terror attacks in St. Petersburg Metro, Champs Élysées, Paris and in Stockholm
- Turkish President Recep Tayyip Erdoğan wins referendum on 18-article constitutional reforms

- Trump begins his first international visit. arriving in Riyadh, Saudi Arabia
- Emmanuel Macron wins French presidential election

____ June ___

- · Saudi Arabia, the UAE, Bahrain and Egypt snap ties with Qatar, citing its support of terrorist groups; Yemen, the Maldives and Libva follow suit: issues list of 13 conditions
- Trump announces withdrawal of US from Paris Climate Agreement

December

- US Supreme Court allows Trump's travel ban to come into effect for 6 mostly Muslim countries
- Trump recognises Jerusalem as Israel's capital, announces plans to move US embassy there: UN General Assembly votes 128 to 9 denouncing decision
- · Iraql military declares victory over Daesh in Iraq; retakes full control of Iragi-Syria border
- · Saudi Arabia announces an end to its 35-year ban on cinemas

- · Saudi Arabia arrests 11 princes and other ministers on corruption charges; over 200 held for questioning
- · Lebanese PM Saad Hariri resigns in a shock TV broadcast from Riyadh
- · Louvre Abu Dhabl opens, the largest art museum in the region

- Saudi Crown Prince Mohammed bin Salman vows to return Saudi Arabia to moderate Islam after announcing Neom, a US\$500 billion megacity
- Daesh headquarters Ragga in Syria is declared fully liberated by Syrian Democratic Forces in US-led alliance

November October September

- · Saudi Arabia overturns ban on women driving: women allowed in King Fahd International Stadium in Riyadh for first time to mark Kingdom's 87th anniversary celebration
- 92% of Iraqi Kurds vote in favour of independence In controversial referendum: leads to short-lived armed conflict over disputed territories

August July —

18,500 Rohingya Muslims flee from violence in Myanmar's Rakhine state to Bangladesh: over 110 reported dead

Iraq proclaims victory over Daesh forces in Mosul

- 70 dead and hundreds injured after reported chemical attack in Douma in Syria; US, UK and France order bombing of Syrian military base
- Cinemas open in Saudi Arabia for the first time since 1983, premiering with Black Panther
- 2018 Land Day protests turn violent; at least 32 Palestinians killed and thousands injured in clashes with Israeli troops

March

- Over 12,000 people flee Eastern Ghouta, Syria, after town bombarded
- · Data mining scandal hits Facebook; Mark Zuckerberg admits to having 'made mistakes'
- Vladimir Putin elected to new six-year term as Russian President
- Trump accepts invitation from Kim Jong-un to meet in May for talks on de-nuclearising the Korean peninsula

2018 / January —

- · Turkey launches military offensive to capture portion of northern Syria from Kurdish forces
- · Anti-government demonstrations in Iran; 30 killed

February

UN calls for ceasefire in rebel-held Eastern Ghouta area by Syrian government troops after 40 people killed; passes resolution for 30-day ceasefire



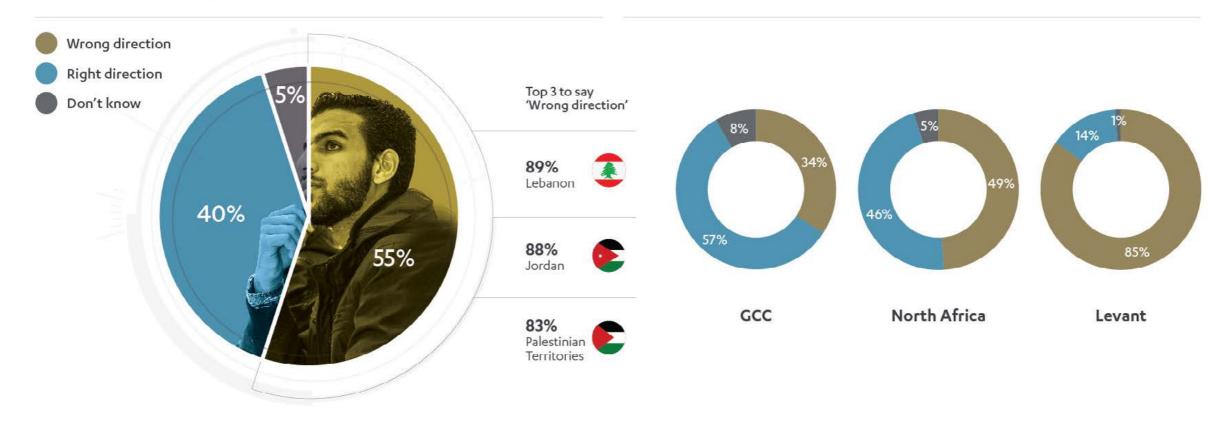
THE PAST 10 YEARS

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?



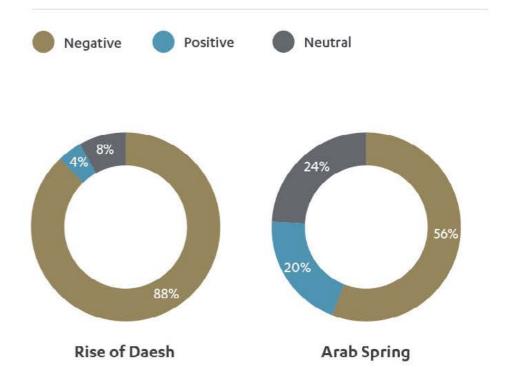
Arab youth say Daesh and the Arab Spring have had the biggest impact on the region over the past decade; both are seen to have impacted the region negatively



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?

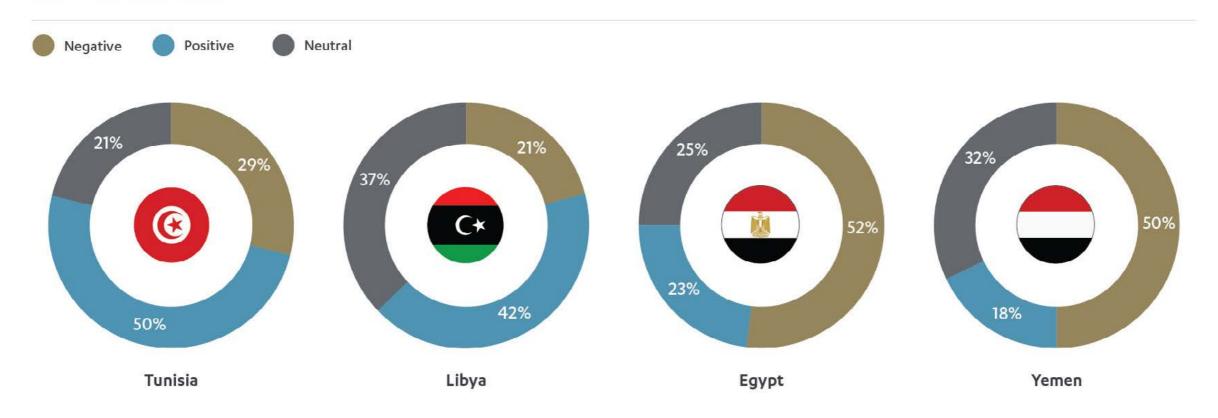




The impact of the Arab Spring is polarising even among youth living in the Arab Spring countries



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







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

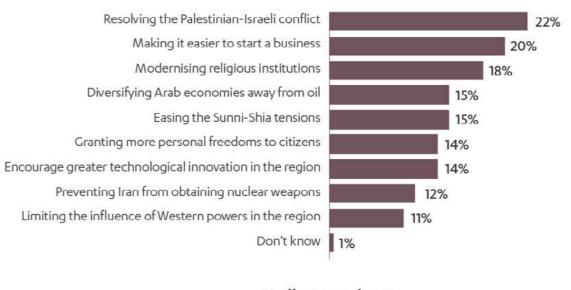


Now thinking about the next 10 years, which of the following, if any, are the most important things necessary for the Arab world to move in the right direction?

Defeating terrorist organisations Modernising the education Top four priorities Creating new, well-paying jobs Creating new, well-paying jobs Creating new, well-paying jobs Creating new, well-paying jobs Oracking down on government 28%

system

Other priorities



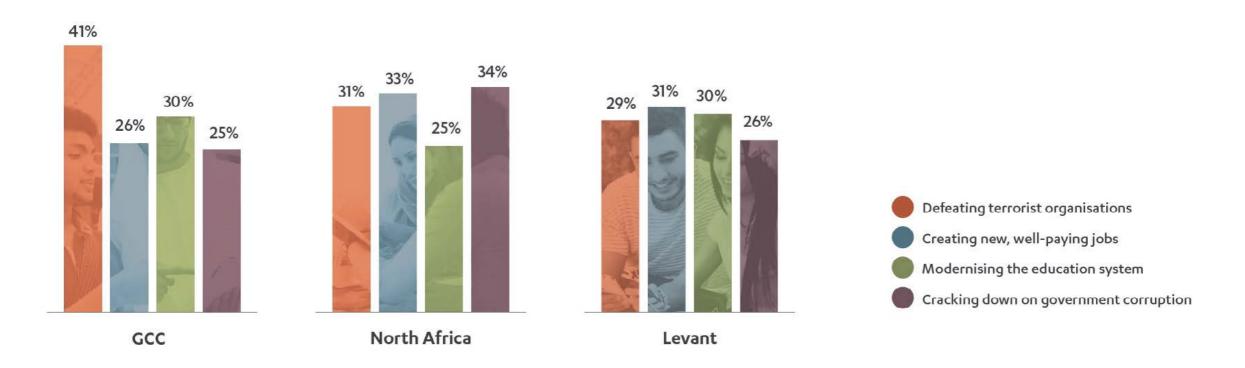
% all respondents

corruption

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?





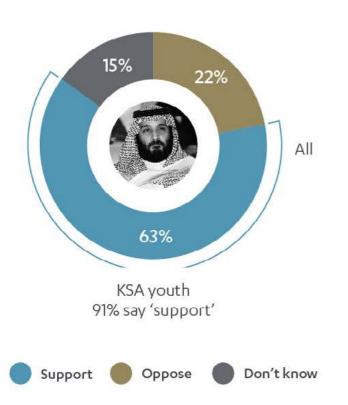


YOUNG ARABS SEE SAUDI CROWN PRINCE MOHAMMED BIN SALMAN AS A STRONG LEADER WHO WILL SHAPE THE NEXT DECADE

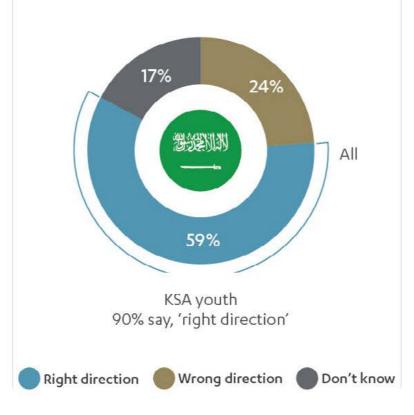
Young Arabs express a high level of confidence in Saudi Crown Prince Mohammed bin Salman and his leadership



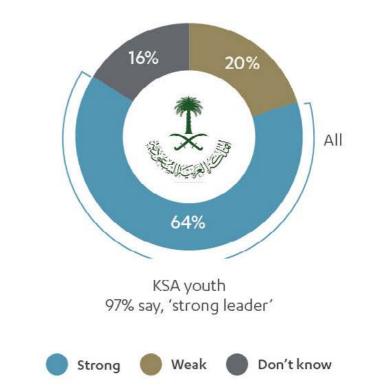
To what extent do you support or oppose the Saudi King's decision to appoint his son Mohammed bin Salman as the new Crown Prince?



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



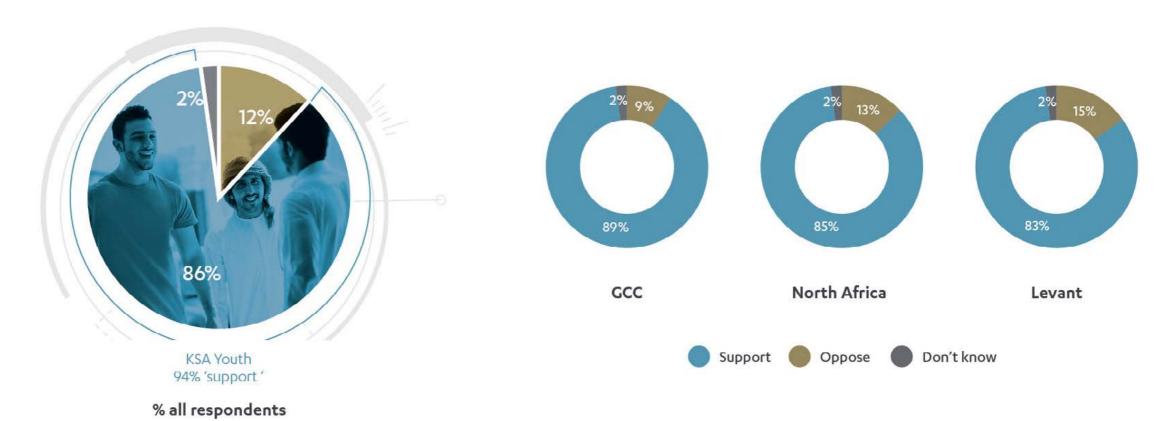
How strong or weak of a leader do you think Mohammed bin Salman is?



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



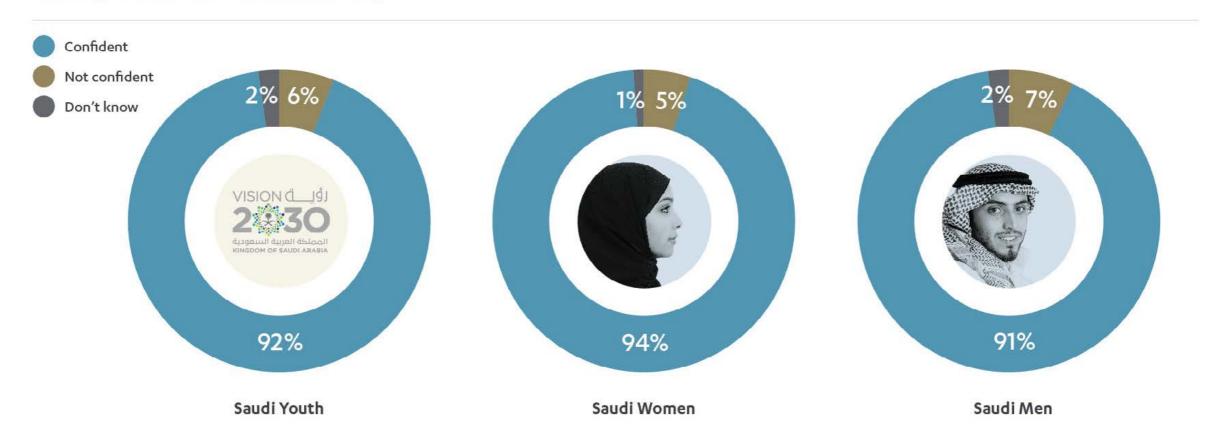
To what extent do you support or oppose the Saudi government's anti-corruption measures?



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



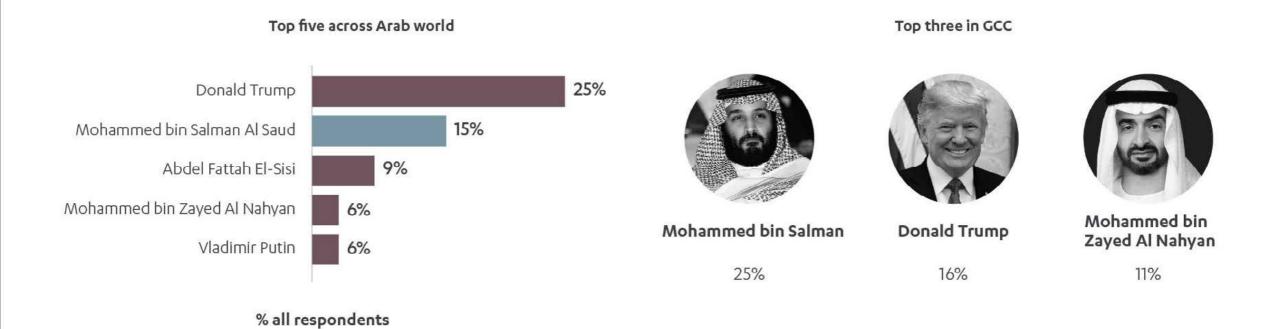
How confident are you that the Saudi Vision 2030 will succeed in securing the future of the Saudi economy?



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?





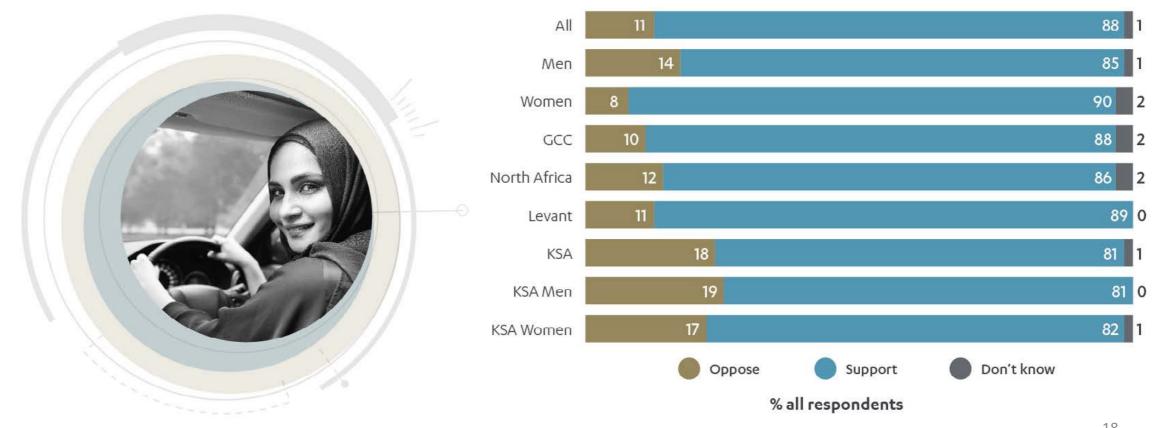


WELCOME THE MOVE TO ALLOW WOMEN TO DRIVE IN SAUDI ARABIA, BUT SAY MORE MUST BE DONE TO ADDRESS WOMEN'S RIGHTS THROUGHOUT THE REGION

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



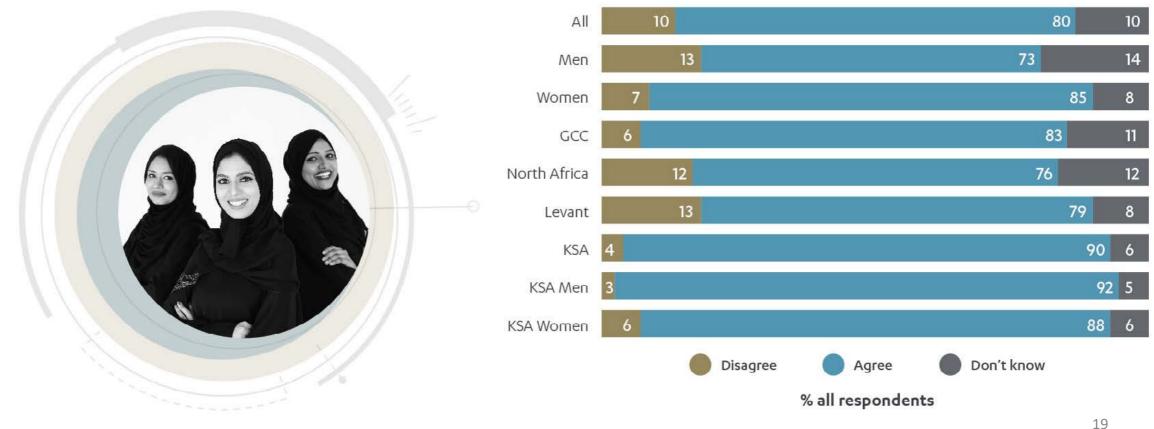
To what extent do you support or oppose the Saudi government's decision to allow women to drive cars?



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"





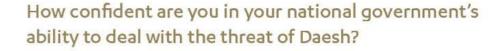


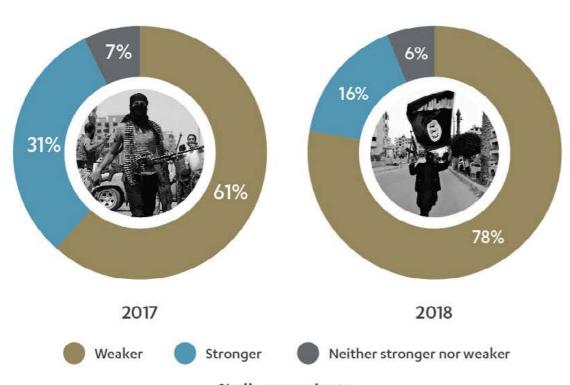
YOUNG ARABS ARE CONVINCED THAT DAESH – AND ITS IDEOLOGY – WILL BE COMPLETELY DEFEATED

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 ...





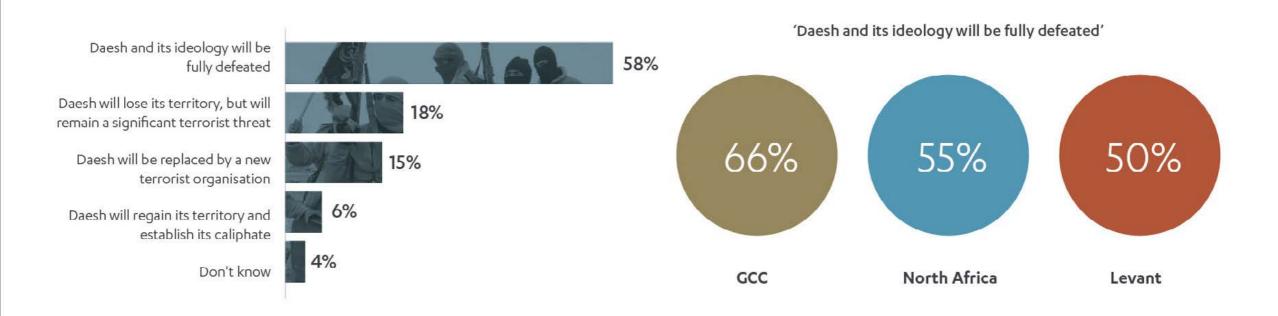


% all respondents

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



What do you think is the future of Daesh?



% all respondents



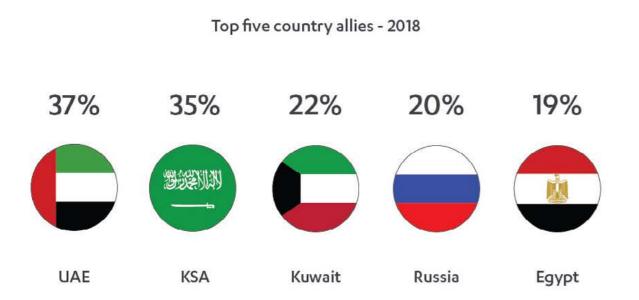


YOUTH ACROSS THE MIDDLE EAST INCREASINGLY VIEW THE US AS AN ADVERSARY, WHILE RUSSIA CEMENTS ITS POSITION AS THE TOP NON-ARAB ALLY

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)

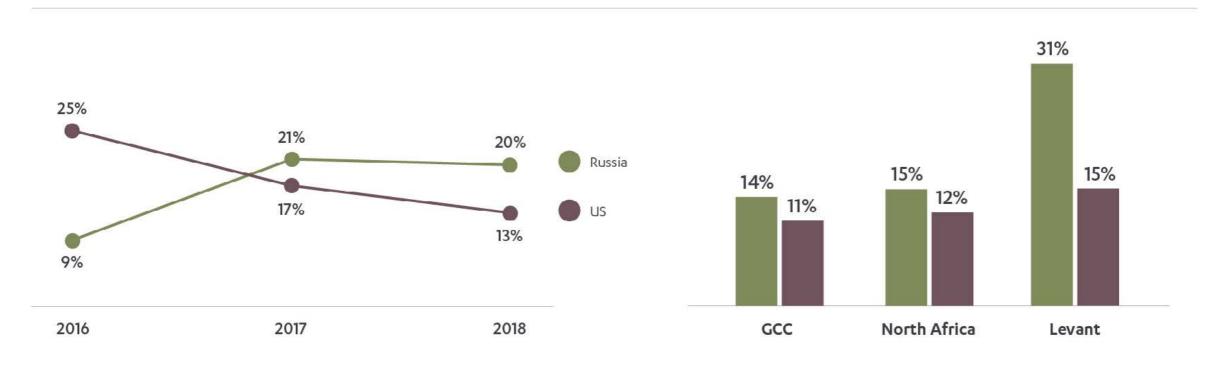


Top five country allies								
2012	2013	2014	2015	2016	2017			
KSA	KSA	KSA	KSA	KSA	UAE			
UAE	UAE	UAE	US	UAE	KSA			
Qatar	Qatar	Qatar	UAE	US	Russia			
Kuwait	Kuwait	Kuwait	Qatar	Egypt	Qatar			
US	US	us	France	UK	US			

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?

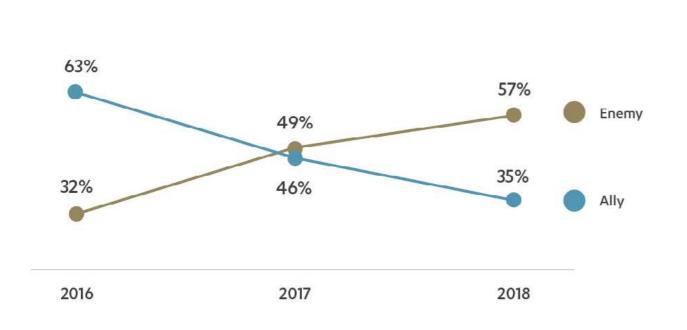


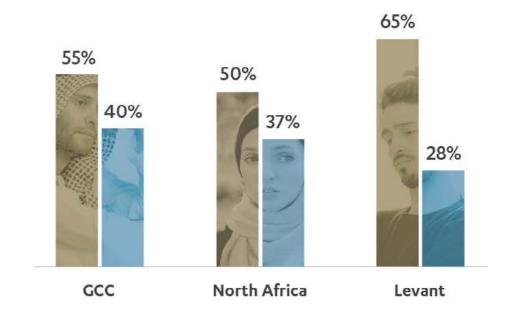
% all respondents 2018 data

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?



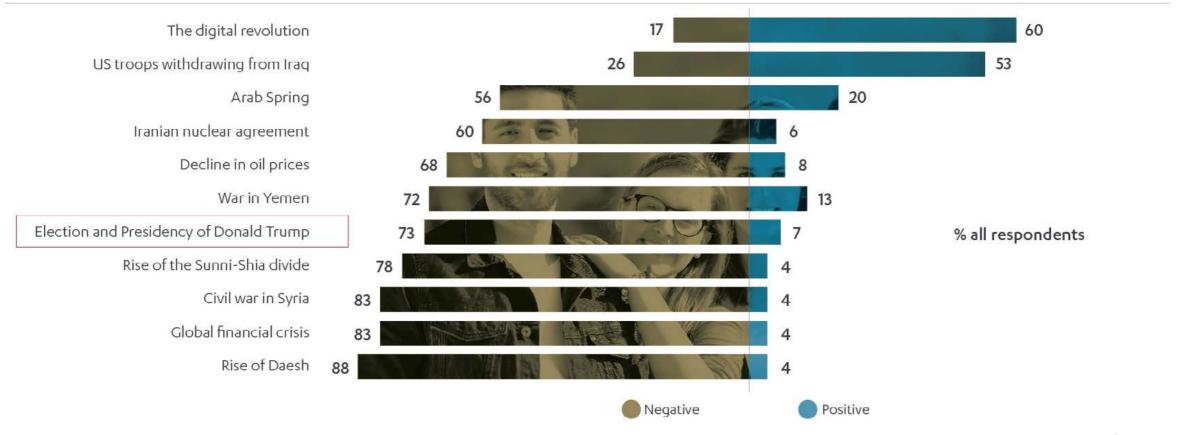


% all respondents 2018 data

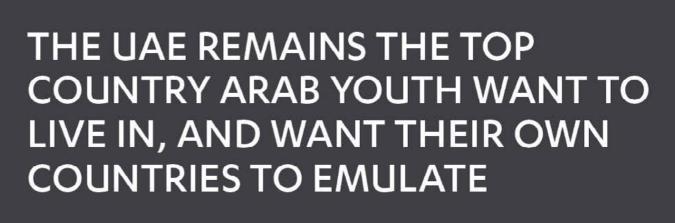
Three-quarters of young Arabs view the impact of Trump's presidency on the region as negative



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







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



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		

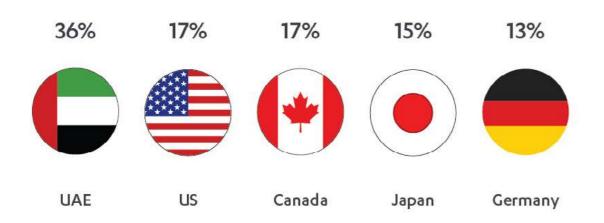
% all respondents

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



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		

% all respondents

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

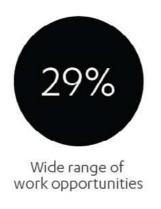


Now thinking specifically about the United Arab Emirates, which of the following phrases, if any, do you associate most with the UAE?

Top three associations with the UAE

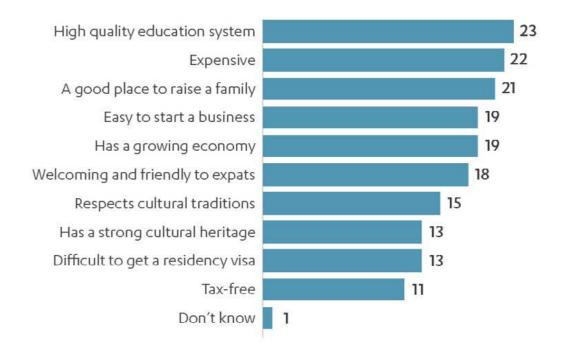






% all respondents

Other associations with the UAE





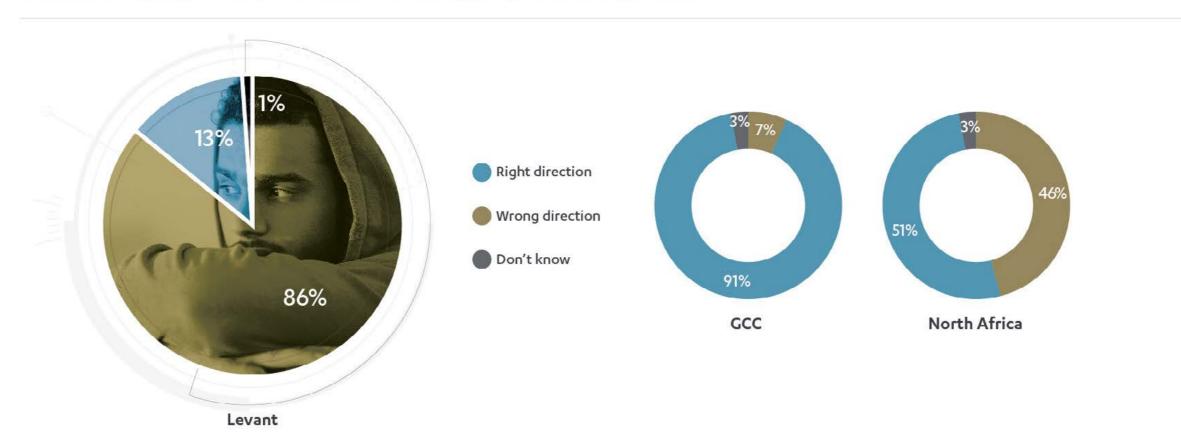


YOUTH IN THE LEVANT HAVE AN INCREASINGLY BLEAK OUTLOOK COMPARED WITH PEERS IN NORTH AFRICA AND THE GULF STATES

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



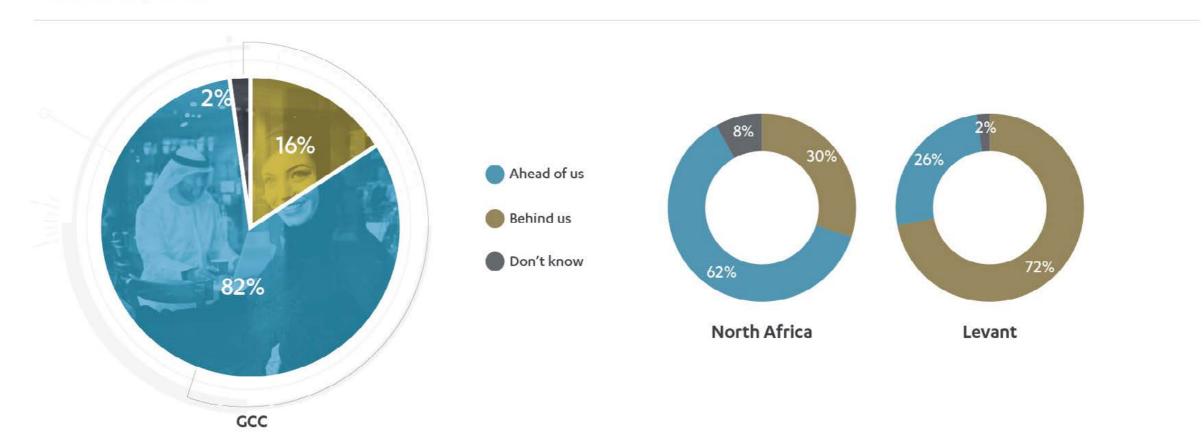
Thinking about the past five years, in general, do you think things in your country of residence are going in the right direction or are they going in the wrong direction?



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



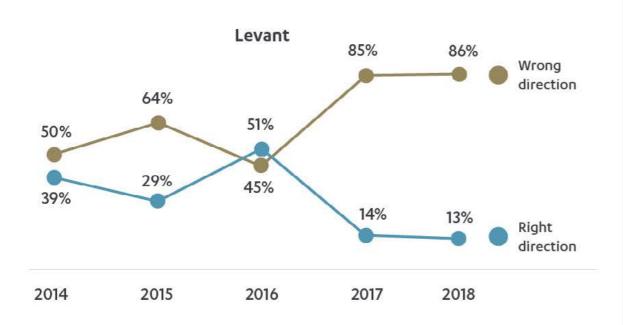
Which of the following do you agree with? "Our best days are..."



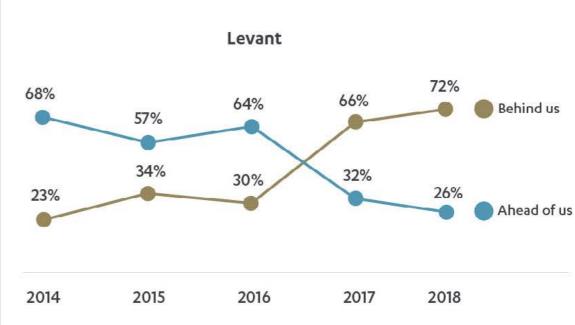
Youth's outlook in the Levant has turned increasingly bleak, particularly over the past two years



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..."





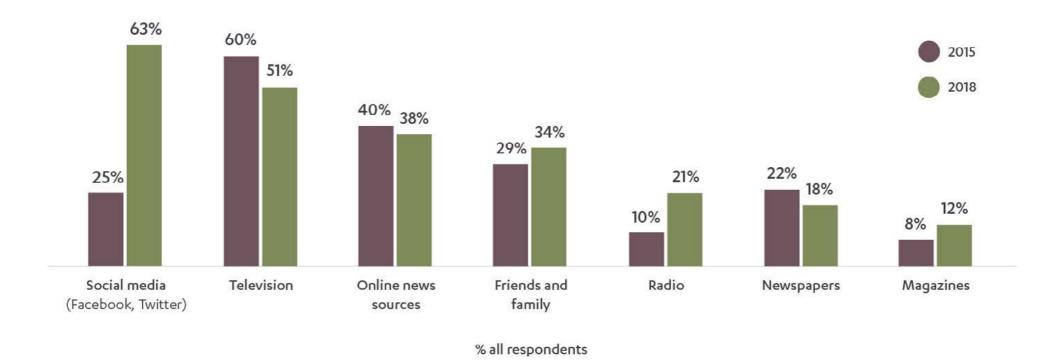


WHILE YOUNG ARABS
INCREASINGLY TURN TO SOCIAL
MEDIA FOR THEIR NEWS, THEY SEE
CNN AS THE MOST TRUSTED AND
AL JAZEERA AS THE LEAST TRUSTED
NEWS SOURCES

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?

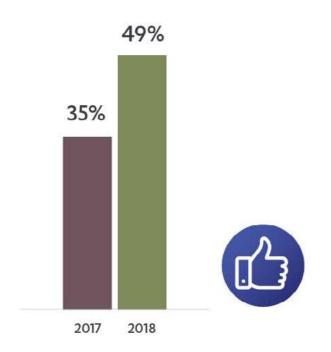


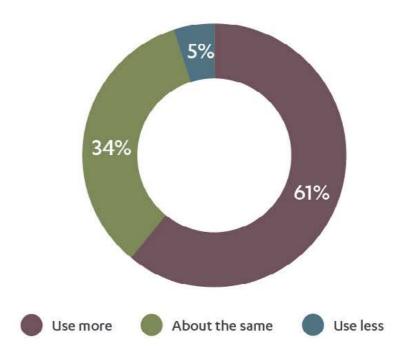
Facebook's influence among Arab youth continues to grow, with half now saying they get their news on Facebook daily



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?

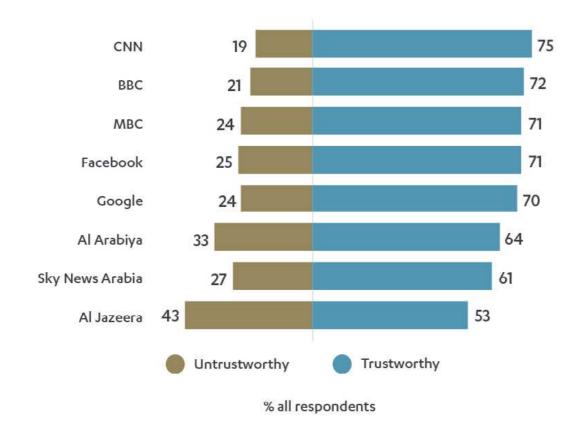




Young Arabs view CNN as the most trusted and Al Jazeera as the least trusted news sources



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







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

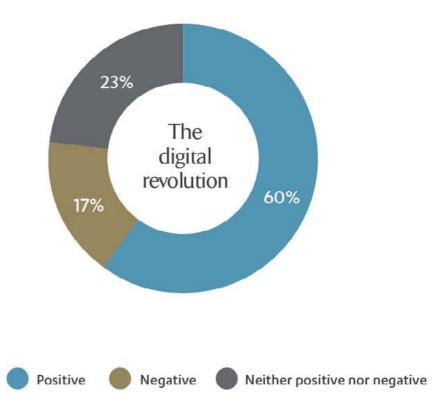
Young Arabs view the digital revolution as an important development that has shaped the region over the past decade



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?

Rise of Daesh 22 Arab Spring The digital revolution GCC: 12 Global financial crisis North Africa: 11 Levant: 8 Decline in oil prices Civil war in Syria Election and Presidency of Donald Trump Rise of the Sunni-Shia divide War in Yemen US troops withdrawing from Iraq Election and Presidency of Barack Obama The killing of Osama bin Laden Iranian nuclear agreement Don't know % all respondents

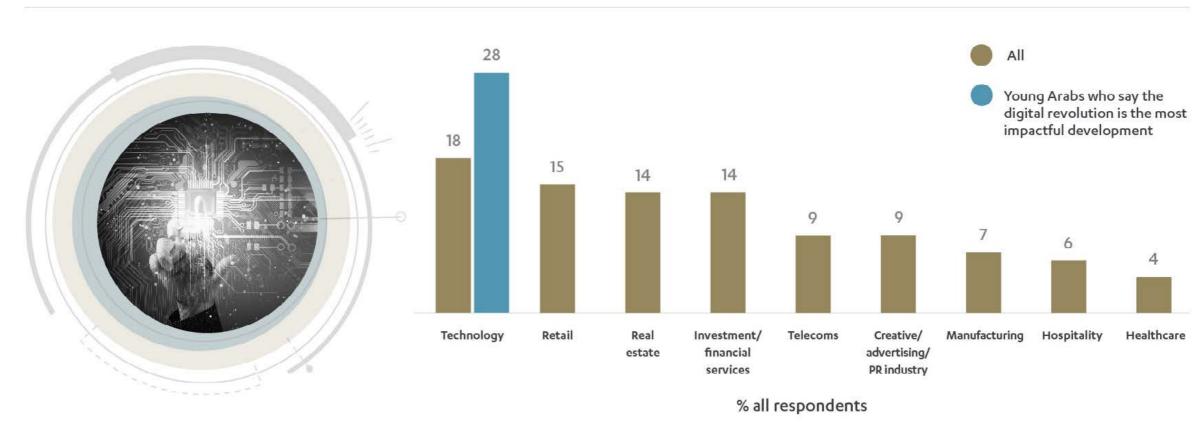
How positive or negative of an impact has this event or development had on the Arab world?



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



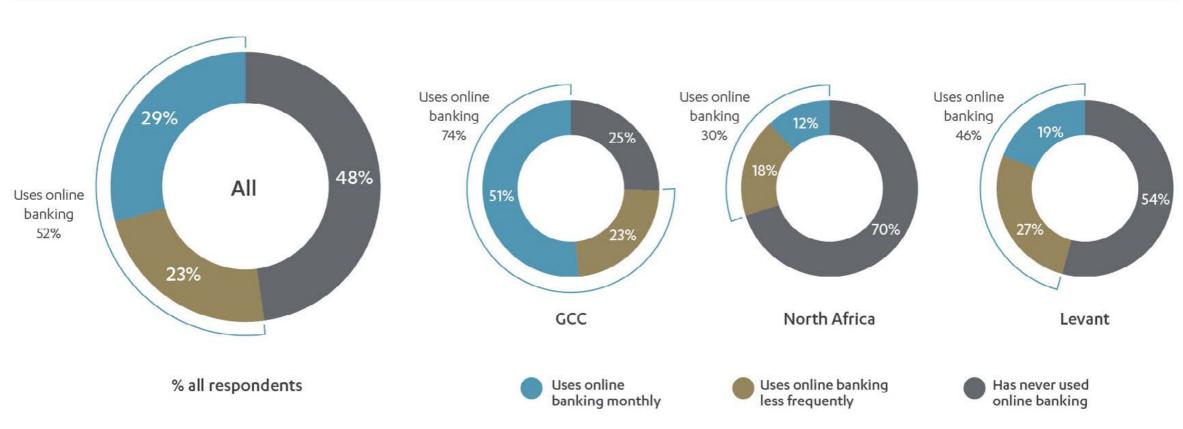
How frequently, if at all, do you shop online?



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



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





TOP10 FINDINGS



Top 10 Findings:

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

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



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



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



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



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



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







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