

A CALL FOR REFORM

11TH ANNUAL ASDA'A BCW ARAB YOUTH SURVEY 2019

The Arab Youth Survey 2019
is dedicated to the Arab world's
200 million youth.

Special thanks to:

PSB for fieldwork and analysis, Proof for design and production of the White Paper,
and our commentators, whose analyses bring rich context and insight to this year's findings.



A CALL FOR REFORM

A White Paper on the findings
of the 11th annual ASDA'A BCW
Arab Youth Survey 2019

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This White Paper can be obtained from
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PROOF



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INTRODUCTION

A PLATFORM FOR DEBATE AROUND CRUCIAL ISSUES FACING THE MIDDLE EAST

Sunil John

President – Middle East and Founder of ASDA'A BCW

We are proud to present the 11th edition of our Survey – personally a passion project for me, my team at ASDA'A BCW and our sister firm PSB. This Survey is an independent initiative completely funded by our own resources and we hope it is utilised to help structure a new Arab world that is brimming with youthful energy, lifting its people to a new level of progress and prosperity that young Arabs desire and deserve.

It was 11 years ago when our agency came up against a surprising obstacle: there was no good, hard data we could use to help our clients – from businesses to governments – understand and reach out to young people in the Middle East. After all, this is a young region – approximately 65 per cent of the Middle East population is under the age of 30. This lack of research proved to be the catalyst to establish a globally important thought leadership initiative: the annual ASDA'A BCW Arab Youth Survey.

In the decade since, our decision to carry out such a comprehensive study each year has been clearly vindicated. After all, it was youth who protested during the Arab Spring, and it was young people who were most at risk with growing terrorism threats and escalating conflicts. Today, it is young people who will be most affected by the rising debt and growing deficits of regional governments. The Arab world has the world's highest youth unemployment, with almost 30 per cent of 18 to 24 year olds out of work. What they think and what they want really matters.

Regional governments are grappling with the traditional and unsustainable "social contracts" with their citizenry and trying to gently introduce a cut in food, energy and fuel subsidies. On the other hand, an internet-savvy youthful generation expect governments to be more

effective in caring for their needs. A likely clash of priorities and expectations from both sides needs to be addressed urgently.

The original aim of the Survey was to provide actionable data that governments and businesses could use to make better decisions. At this the Survey has excelled, becoming a much-anticipated resource for governments, multinationals, local enterprises and regional and global media. Over the years, though, the Survey has grown to become more than just an exercise in research.

It has become a platform for young Arabs to have their voices heard around the world; a forum for debate on the Middle East's future; and a trackable chain of insights and analysis stretching back more than a decade, charting the recent history of a tumultuous region through the eyes of its youth. As is well known, those who fail to learn from history are doomed to repeat it.

Ultimately, the Arab Youth Survey has evolved to become an essential part of the conversation around the hopes and fears of young people in the Middle East, and an important barometer of how an important demographic view their past, present and future.

METHODOLOGY

The 11th Annual ASDAA BCW Arab Youth Survey 2019 was conducted by international research firm PSB to explore attitudes among Arab youth in 15 countries in the Middle East and North Africa. PSB conducted 3,300 face-to-face interviews from January 6 to 29, 2019, with Arab men and women in the age group of 18 to 24. The interviews were completed in Arabic and English.

The aim of this annual Survey is to present evidence-based insights into the attitudes of Arab youth, providing public and private sector organisations with data and analysis to inform decision-making and policy formation.

The Survey is the largest of its kind of the region's largest demographic, and covers five of the Gulf Cooperation Council states (Bahrain, Kuwait, Oman, Saudi Arabia and the UAE), North Africa (Algeria, Egypt,

Libya, Morocco, and Tunisia) the Levant (Iraq, Jordan, Lebanon and the Palestinian Territories) and Yemen. The survey this year did not include Syria or Qatar.

Respondents, exclusively nationals of each of the surveyed countries, were selected to provide an accurate reflection of each nation's geographic and socio-economic make-up. The gender split of the survey is 50:50 male to female. The margin of error of the survey is +/- 1.65 per cent.

There were 200 respondents for each country represented in the survey, except for the UAE, Saudi Arabia and Egypt, with 300 respondents each, and Iraq with 250 and the Palestinian Territories with 150.

The geographic location of respondents was also taken into account by PSB when developing the fieldwork methodology – with, for example, 40 per cent of UAE

respondents in Abu Dhabi, 40 per cent in Dubai and 20 per cent in Sharjah.

Saudi respondents were drawn from three of the country's main cities, Riyadh, Jeddah and Damman; youth in the Palestinian Territories from the West Bank and Gaza; Oman's youth from Muscat and Batinah; Lebanese youth from Beirut, Saida, and Tripoli; Tunisian youth from Tunis, Sfax and Soussa; Iraqi youth from Baghdad, Irbil and Basrah; Egyptian youth from Cairo, Alexandria and Mansoura, and so on across each country. Due to growing instability, we removed Misrata from the Libya fieldwork this year.

When analysed, this geographic spread provides a more accurate national picture than findings based solely on the responses of those living in capital cities.

UAE	Oman	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon
N=300	N=200	N=200	N=300	N=200	N=300	N=200	N=200
Dubai (40%)	Muscat (50%)	Manama (100%)	Jeddah (40%)	Kuwait City (20%)	Cairo (50%)	Amman (50%)	Saida (20%)
Sharjah (20%)			Riyadh (40%)	Hawalli (30%)			Alexandria (25%)
Abu Dhabi (40%)	Batinah (50%)		Dammam (20%)	Al Ahmadi (20%)	Mansoura (25%)	Zarqa (25%)	
					Al Farwaniya (30%)		

Iraq	Tunisia	Libya	Algeria	Morocco	Yemen	Palestinian Territories
N=250	N=200	N=200	N=200	N=200	N=200	N=150
Baghdad (50%)	Tunis (50%)	Tripoli (65%)	Algiers (50%)	Casablanca (25%)	Sannaa (50%)	Gaza (50%)
Irbil (25%)	Safaqis (25%)		Oran (25%)	Fes (25%)		Al Hudaydah (25%)
Basrah (25%)	Susah (25%)	Benghazi (35%)	Constantine (25%)	Marrakech (25%)	Ta'izz (25%)	

3,300
face-to-face
interviews conducted
by PSB

Arab youth
(nationals only) in the
age group of
18-24 years

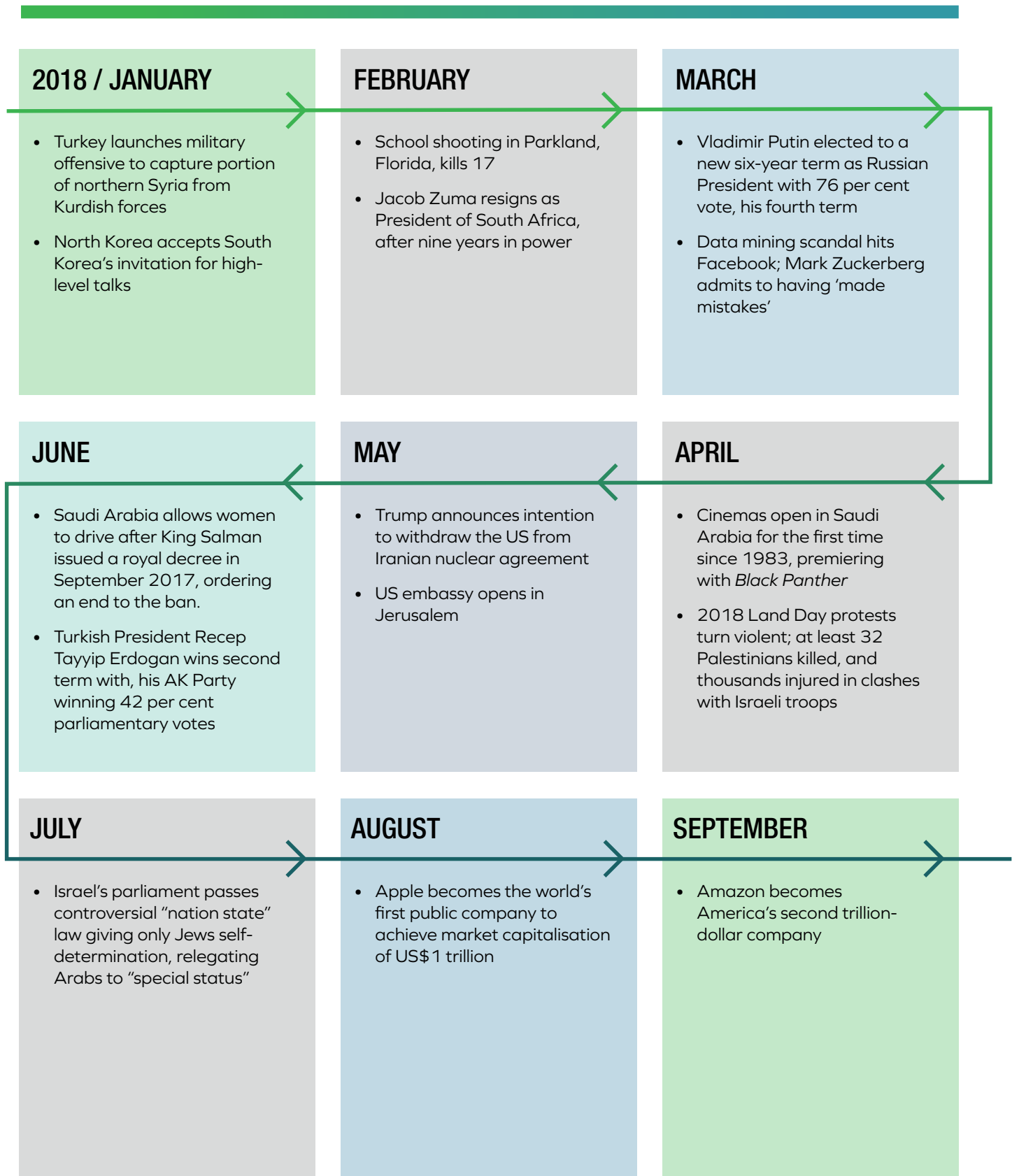


15
Countries and
territories

Sample split
50:50
male/female

TIMELINE

KEY EVENTS OF 2018 AND Q1/Q2 2019



OCTOBER

- *The Washington Post* journalist Jamal Khashoggi's disappearance triggers diplomatic crisis

NOVEMBER

- Attempt to move 720,000 Rohingya Muslims back to Myanmar from Bangladesh refugee camps amid international criticism

DECEMBER

- France witnesses its worst civil unrest since the protests of 1968 following the yellow vests movement
- Trump announces victory over Daesh and planned withdrawal of US troops from Syria

MARCH

- 50 people killed and 50 others injured in a terrorist attack on two mosques in Christchurch New Zealand
- Syrian Democratic Forces announce the last Daesh territory has been retaken raising flags in Baghuz, Syria
- Pope Francis visits Morocco
- Trump declares Golan Heights part of Israel

FEBRUARY

- Pope Francis arrives in Abu Dhabi, UAE, becoming the first pope to visit the Arabian Peninsula
- Egyptian parliament approves measures to enable President Abdel Fattah el-Sisi to extend his rule until 2034

2019 / JANUARY

- Qatar withdraws from OPEC; says it would focus on its natural gas industry
- **SURVEY
FIELDWORK
JANUARY 6-29**

APRIL

- Abdelaziz Bouteflika resigns as President of Algeria amid widespread protests, after nearly two decades as president
- Saudi Aramco revealed to be world's most profitable company at \$111.1 billion in 2018
- Omar al-Bashir is arrested and ousted from power in Sudan after over three decades as President
- General Khalifa Haftar's Libyan National Army advance to the capital Tripoli.

TOP 10 FINDINGS

WHAT DO 200 MILLION ARAB YOUTH
HAVE TO SAY ABOUT THEIR FUTURE?

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 the quality of education in their country, and more than half want to pursue higher 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

OVERVIEW

A PRAGMATIC GENERATION – NEITHER RADICAL NOR REVOLUTIONARY



Afshin Molavi is a senior fellow at the Foreign Policy Institute of the Johns Hopkins University School of Advanced International Studies in Washington DC, where he writes broadly on emerging markets, Middle East political economies, the New Silk Road, and the intersection of geopolitics and the global economy. Molavi's writings over the years have appeared in the *Financial Times*, *The New York Times*, *Foreign Policy*, *BloombergView*, *The Washington Post*, *Newsweek*, *Businessweek*, *Journal of Commerce*, *National Geographic* and *Institutional Investor*, and he has been a regular guest on *CNN*, *BBC*, *Al-Arabiya*, *Sky News Arabia* and other channels. He is the founder and editor of the *New Silk Road Monitor*.

Afshin Molavi

Fadi Ghandour, one of the Arab world's leading entrepreneurs and technology investors, once famously extolled the virtues of the online world by saying: "there is no wasta on the internet". Wasta, of course, refers to the elite connections that pave the way for business or political success at the highest levels, or a job or a university slot at lower levels. The overuse of wasta corrodes societies, impairs growth, fuels unrest and squanders the potential of so many young Arabs who simply want the dignity of fair opportunity.

Over the years, the Arab Youth Survey has demonstrated in clear and compelling ways the pragmatic desires of Arab youth for jobs, security, better education, and more government accountability, while rejecting terrorism, extremism, and corruption.

Consider this wasta-free transaction that took place in late March 2019: the global

ride-sharing company Uber paid \$3.1 billion to acquire its Dubai-based regional rival, Careem. Or this wasta-free transaction: In 2017, global e-commerce giant Amazon purchased Arab world e-commerce player Souq.com for nearly \$600 million. What mattered to Uber and Amazon were the numbers, not wasta, and Careem and Souq had been delivering impressive numbers with their rapid growth across the Middle East and North Africa region, as well as Pakistan.


As a result, the founders of companies like Souq.com and Careem have become admired figures among Arab youth; individuals who worked hard – very hard – played it straight, and achieved success. Social media, the number one news source for young Arabs, (Finding 10) buzzed with praise for Careem. To many young Arabs, these companies have demonstrated what societies without wasta can achieve.

This might help explain why, for the eighth year in a row in the Arab Youth Survey, young Arabs have chosen the UAE as the

country they would most like to live in and emulate. While no country is wasta-free, it's no accident that both Souq.com and Careem are based in Dubai. They benefit from both world-class infrastructure of connectivity and access to talent, but also one of the more meritocratic – even cut-throat – entrepreneurial environments in the region.

When asked their perceptions of the UAE, the number one item that came up is "a wide range of work opportunities". In second place came "safety and security" and in third came "generous salary packages". Their perceptions were that the UAE offered them fair opportunity and a decent chance to get a decent job, and that, alas, remains a rare thing.

Over the years, the Arab Youth Survey has demonstrated in clear and compelling ways the pragmatic desires of Arab youth for jobs, security, better education, and more government accountability, while rejecting terrorism, extremism, and corruption.



The Arab Youth Survey has demonstrated that the demands and dreams of young Arabs are neither radical nor revolutionary. They are the aspirations of a pragmatic generation unlikely to fall for the false utopias or “charismatic” leaders their parents fell for.

It is the failure to achieve those aspirations by governments still riddled with corruption ruling societies weighed down by *wasta* that has likely led to rising levels of depression and anxiety among Arab youth, as a 2018 report in *Al-Fanar Media*, a chronicler of education trends in the Arab world, noted. Justin Thomas, associate professor in psychology at Zayed University in Abu Dhabi, was quoted as saying in that report, “everywhere you look, you will find depression”. The Arab Youth Survey shows that nearly one in three young Arabs know someone with anxiety or depression (Finding 8). Given the stigma associated with those diseases, also shown in the survey, the real numbers are likely to be higher. This might help explain why young Arabs perceive that drug use is rising among their cohorts (Finding 7).

In such instances, when individuals face a crisis of meaning or anxiety or depression, they might call on a higher authority for solace. But in a remarkable finding, two out of three young Arabs believe that “religion plays too big of a role in the

Middle East” and a whopping 79 per cent believe that “the Arab world needs to reform its religious institutions” (Finding 1). This is not to suggest that young Arabs have become irreligious – the data does not show that – but it clearly demonstrates that young Arabs are losing faith in the governance of their religious institutions and that they would like to see less religion in the governing of national affairs.

For those of us who have been watching the Arab Youth Survey’s findings from their inception, this finding should come as little surprise. After all, youth that consistently rate jobs, security (both physical and financial), and opportunity at the top of their list of desires would, therefore, value those institutions and entities that could help them achieve those goals – and religion is not the obvious choice. A few great scholars like Sheikh Abdullah Bin Bayyah of the Forum for Promoting Peace in Muslim Societies, who has developed a theological architecture of cosmopolitanism and pluralism that would appeal to Arab

youth, might help bridge that gap – but the gap seems even too large for a figure like that.

When young Arabs feel down, who do they look to for help? Surprisingly, the same institution that, in many ways, contributed to the squandering of their potential: their governments. A majority of young Arabs believe that the government’s social contract with its people does not only apply to healthcare and education and security, but also jobs and housing (Finding 2). Those same young Arabs hungry for *wasta*-free opportunity don’t mind a social safety net either.

In the end, the Arab Youth Survey has demonstrated, once again, that the demands and dreams of young Arabs are neither radical nor revolutionary. They are the aspirations of a pragmatic generation unlikely to fall for the false utopias or “charismatic” leaders their parents fell for. They are too busy looking for a job, and scrolling through social media.



RELIGION

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

Religion plays an prominent role in the Middle East and North Africa, according to young Arabs surveyed throughout the region.

Asked whether they agree or disagree with the statement “Religion plays too big of a role in the Middle East”, two-thirds (66 per cent) said that they agreed, while 24 per cent disagreed and 10 per cent didn’t know.

Further, an overwhelming majority of young Arabs believe that religious institutions across the region are in need of an overhaul, with 79 per cent agreeing with the statement “The Arab world needs to reform its religious institutions” and just 12 per cent disagreeing.

The perception that religion is playing too big of a role has increased among Arab youth over the past four years. In 2015 half (50 per cent) of those surveyed said they thought religion played an prominent role, rising to two-in-three today (66 per cent). Young Arabs today are also more sure of themselves: in 2015, one in five (21 per cent) said they didn’t know if religion was playing too big a role; by 2019 the ‘don’t knows’ had fallen to one-in-ten, with those agreeing to the dominant role of religion increasing.

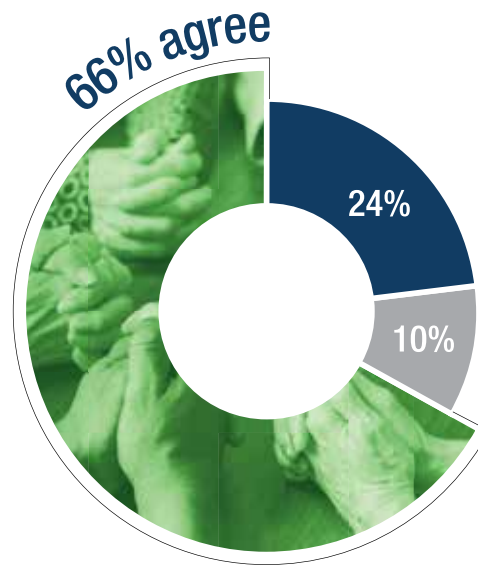
Despite strong views on how big a role religion plays and need for the reform of religious institutions, young Arabs are more divided when it comes to the impact of religion on the region. Asked whether they agree or disagree with the statement “The Arab world’s religious values are holding the Arab world back”, 50 per cent agree and 42 per cent disagree, with 8 per cent saying they don’t know. While youth in the GCC and North Africa are generally quite evenly split, in the Levant, 61 per cent agree religion is holding the region back, while a third (31 per cent) disagree.

Almost half of young Arabs (49 per cent) say religion is losing its influence in the Middle East, while only 29 per cent say it is gaining influence, and a fifth (21 per cent) say it is hovering around the same level. However, the views on influence vary by geography. In the GCC, 39 per cent of young Arabs think religion is losing its hold, compared with 54 per cent in the Levant.

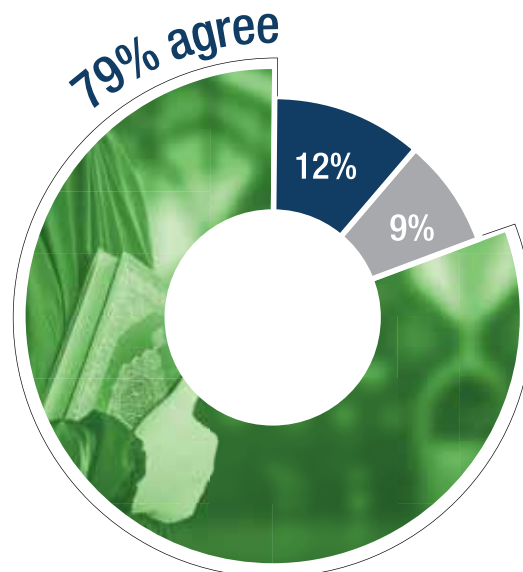
YOUNG ARABS SAY RELIGION PLAYS TOO BIG OF A ROLE IN THE MIDDLE EAST AND RELIGIOUS INSTITUTIONS NEED TO BE REFORMED

HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT?

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



“The Arab world needs to reform its religious institutions”



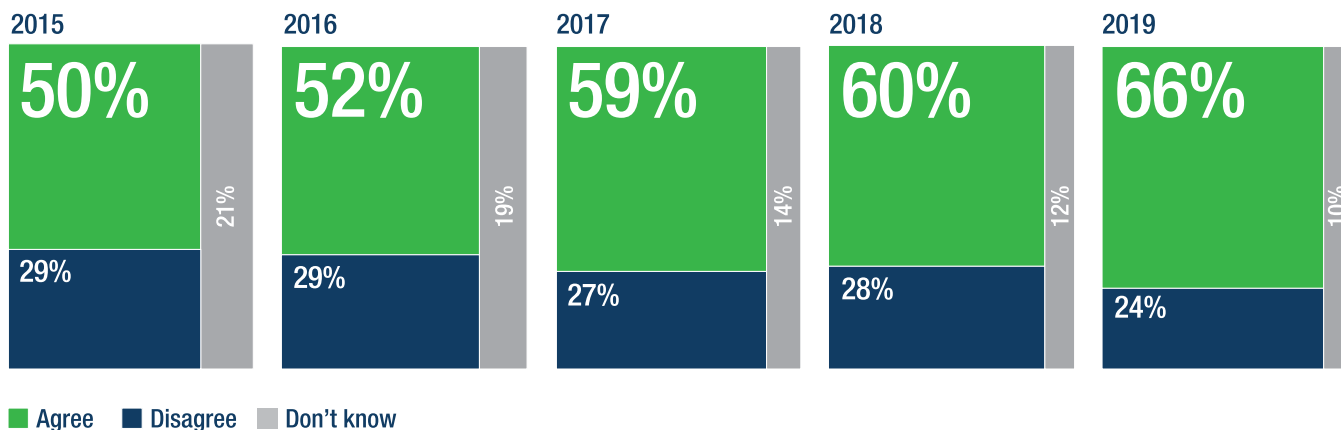
■ Agree ■ Disagree ■ Don't know

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”

(Showing % agree)

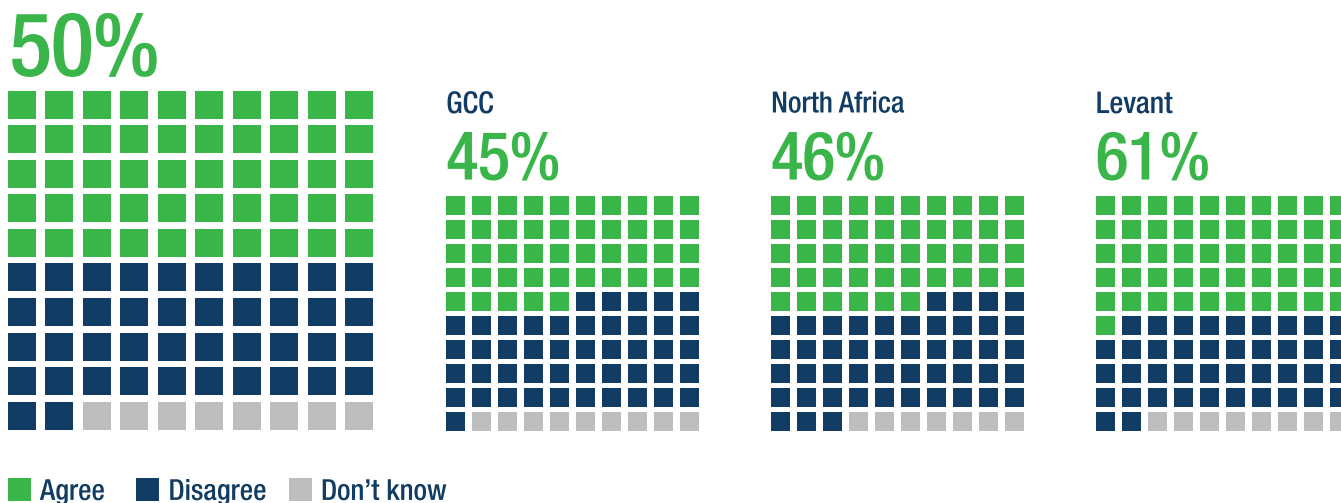


HALF OF YOUNG ARABS SAY RELIGIOUS VALUES ARE HOLDING THE REGION BACK

HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT?

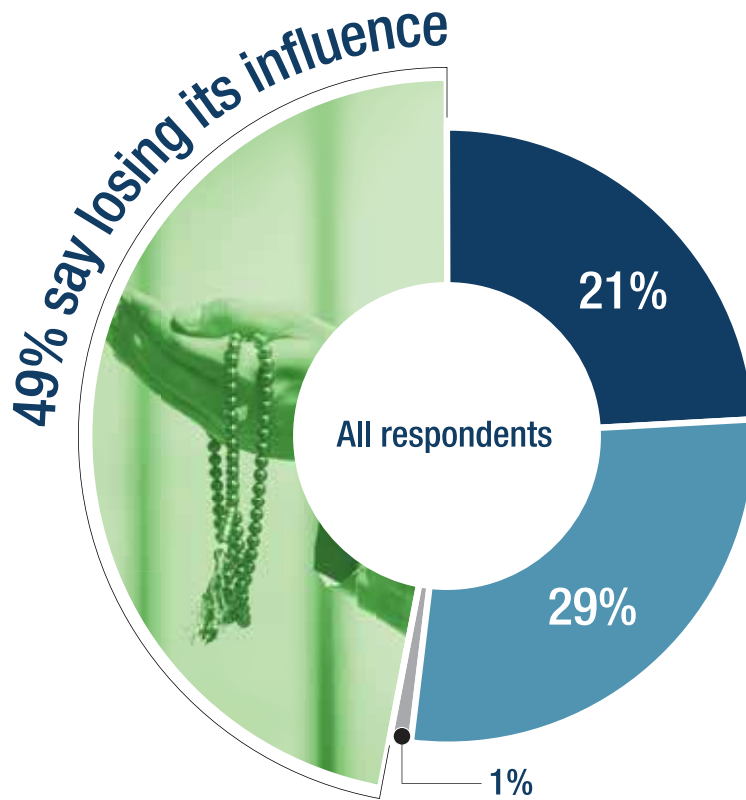
“Arab world's religious values are holding the Arab world back”

All respondents



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?



■ Losing its influence
 ■ About the same
 ■ Increasing its influence
 ■ Don't know



GOVERNMENT ROLE

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

Economic concerns are top of mind for young Arabs, with more than half (56 per cent) saying the rising cost of living is the biggest challenge facing the Middle East today, followed by unemployment, chosen by 45 per cent. Slow economic growth was fourth, chosen by 31 per cent – just below lack of Arab unity (35 per cent).

As the region moves on post 2011's 'Arab Spring', economic concerns are ahead of challenges such as the Syrian war (28 per cent), the threat of terrorism (26 per cent) and lack of democracy (25 per cent).

Young Arabs also express concern that governments are not doing enough to address the economic situation. Two-thirds (65 per cent) of young Arabs surveyed agree with the statement: "My country is not doing enough to help young families", while more than a quarter (26 per cent) disagree. The regional breakdowns reveal a stark divide: in the GCC, 39 per cent agree, with 51 per cent disagreeing, while in North Africa three quarters (74 per cent) and in the Levant four-in-five (83 per cent) believe that the government is not doing enough to help young families.

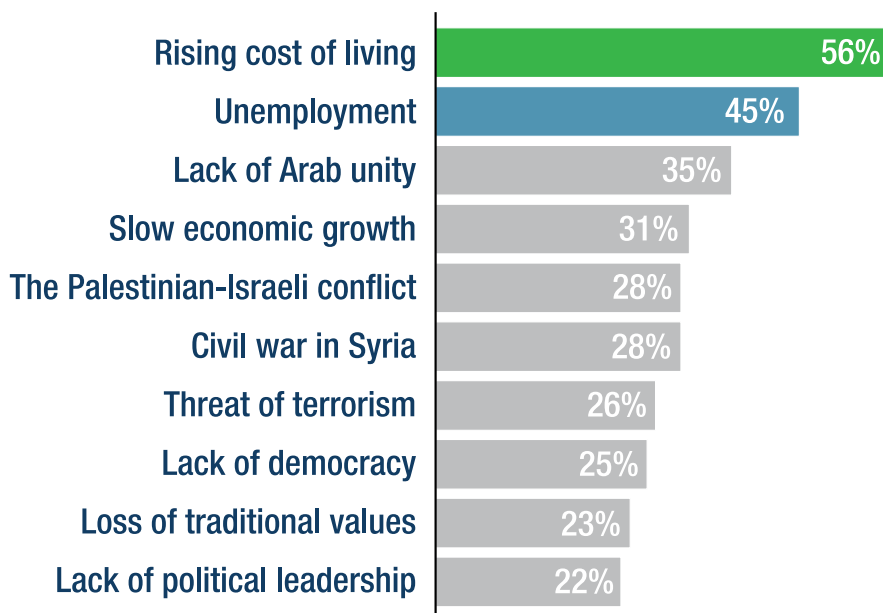
The majority of young Arabs say governments have a responsibility to provide a range of services and safeguards to all citizens, including: safety and security (96 per cent); education (89 per cent); healthcare (88 per cent); subsidised energy (78 per cent); jobs (78 per cent) and housing (60 per cent). In addition, a third of young Arabs (33 per cent) believe the government has a duty to pay off the debts of all citizens, with a further 49 per cent stating the government should repay debts of those in need.

Youth across all regions are generally in sync with their expectations from government, with slightly higher expectations from youth in the Gulf than those elsewhere. Housing was a notable exception with 77 per cent of GCC youth expecting governments to provide housing to all citizens, against 64 per cent in North Africa and just 38 per cent in the Levant. Young Arabs in the Levant are also significantly less likely to expect governments to pay debts of all citizens: only 20 per cent of Levant youth say the government should clear debts of citizens against 36 per cent of GCC youth and 44 per cent in North Africa.

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)



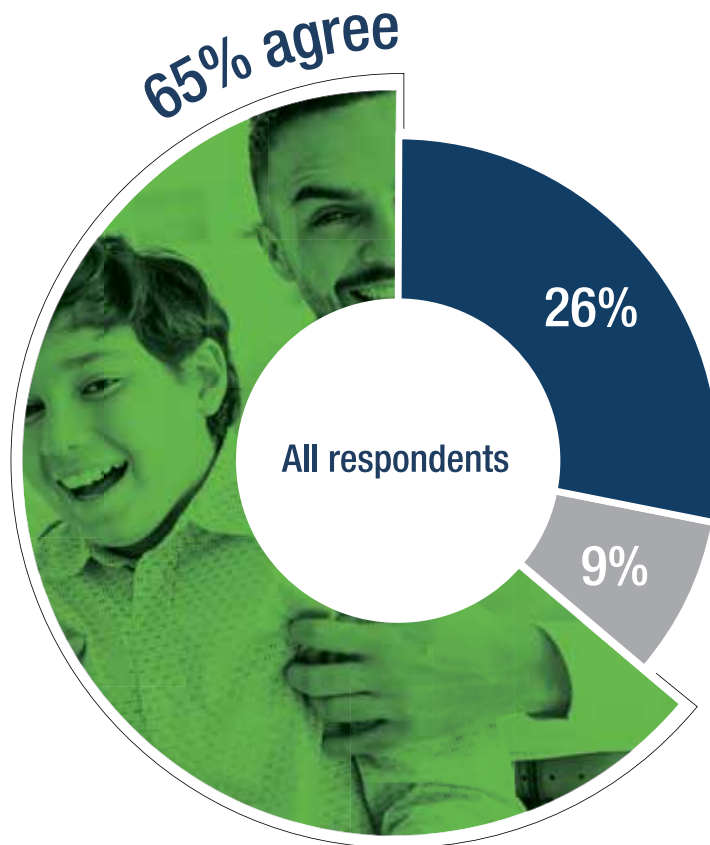
Top three concerns facing the Middle East

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



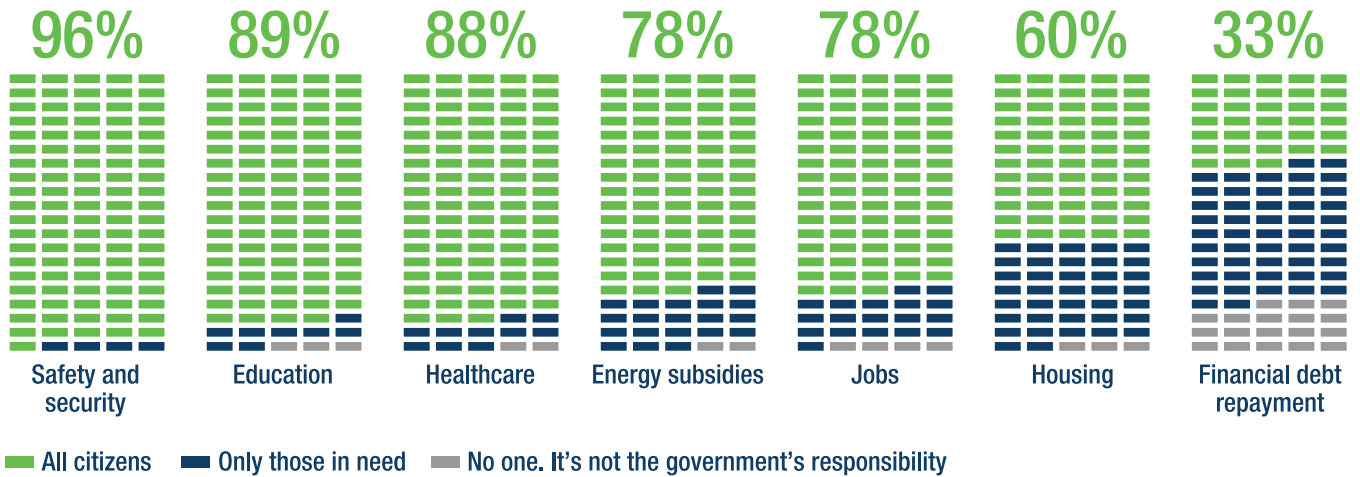
Levant



■ 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

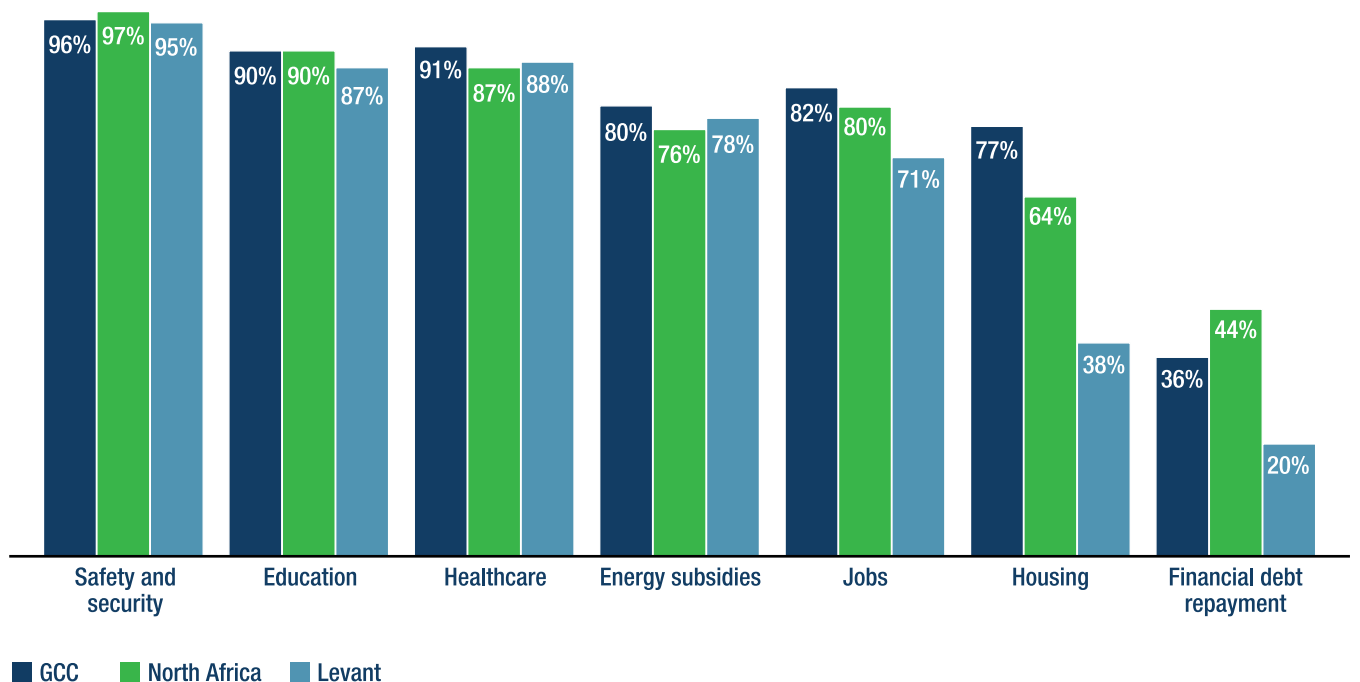
IT SHOULD BE THE GOVERNMENT'S RESPONSIBILITY TO PROVIDE _____ TO...?



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')





3

EDUCATION

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

Young Arabs across the region are concerned about the quality of education they are receiving in their home countries, with more than three in four (78 per cent) saying they are concerned about the quality of their schooling.

Youth in Levant and North Africa are most worried, with 84 per cent and 81 per cent, respectively, saying they are concerned with the quality of the education they receive. Youth may be least worried in the GCC states, however, even their young people are noticeably concerned, with 70 per cent of young people saying they are worried about the quality of education.

Many young people are also concerned that the education they are receiving is not preparing them for the jobs of the future, although there is a marked geographic divide, with students in the GCC overwhelmingly satisfied in this regard. Concern is particularly acute in the Levant, where three-quarters of youth (73 per cent) say they are not satisfied with how their education system is preparing students for the jobs of the future, against 49 per cent for young Arabs as a whole. In the GCC, eight-in-ten (80 per cent) of young people said they were satisfied with how their schooling was readying them for future careers, while youth in North Africa were more divided, with 53 per cent saying 'dissatisfied' and 47 per cent saying 'satisfied'.

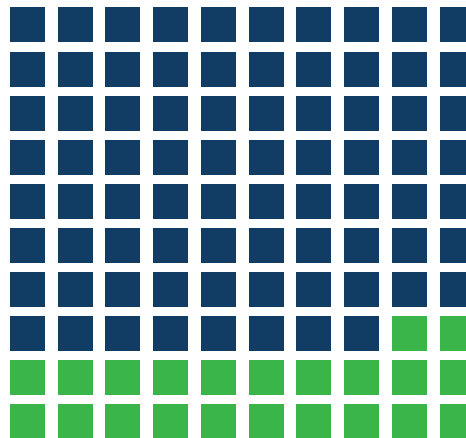
Concerns over schooling extends to higher education, with just a third of young Arabs (32 per cent) saying that, should they choose to pursue further education, they would do so in their home country. The majority, 53 per cent, would seek to attend college or university in the West, while just 15 per cent would look to another Arab country. The regional breakdown shows that youth in the GCC are considerably more positive towards their own further education institutions, with 44 per cent saying they would pursue higher education in their home countries, against 28 per cent of young people in North Africa and 24 per cent in the Levant.

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?

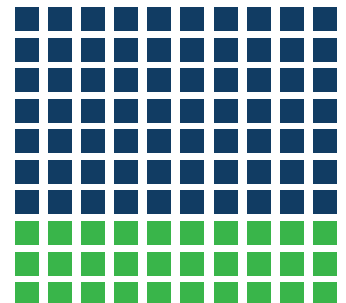
All respondents

78%



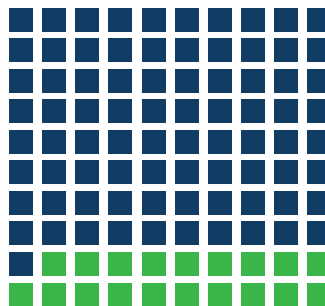
GCC

70%



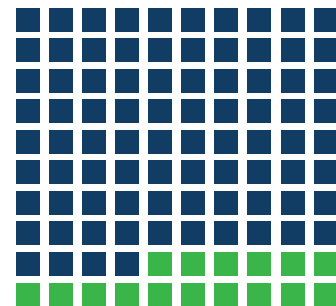
North Africa

81%



Levant

84%



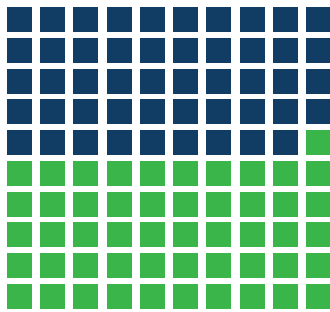
■ Concerned ■ Unconcerned

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 JOBS OF THE FUTURE?

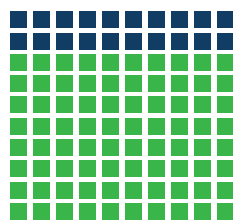
All respondents

49%



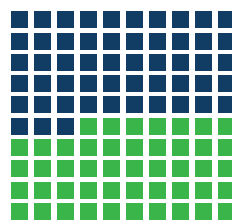
GCC

20%



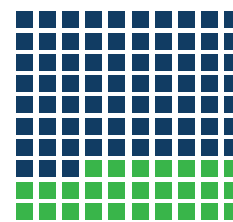
North Africa

53%



Levant

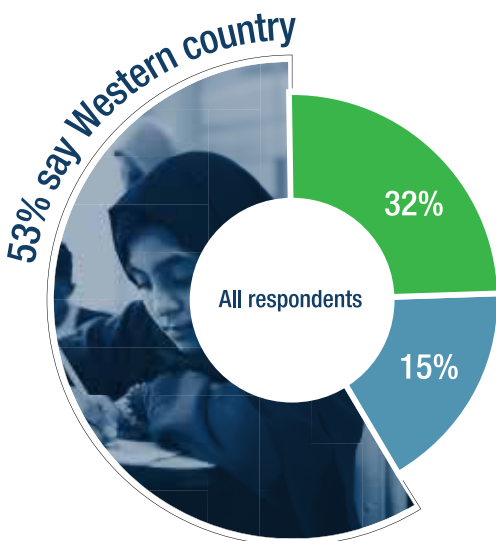
73%



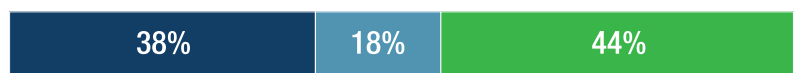
■ Unsatisfied ■ Satisfied

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?



GCC



North Africa



Levant



■ Western country ■ Arab world ■ My country ■ Don't know





4

FOREIGN RELATIONS

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

Young Arabs believe Saudi Arabia is the Arab country that has the most, increased its influence in the Middle East over the past five years, with more than a third (37 per cent) of young people choosing the Kingdom, followed by the UAE (27 per cent) and Egypt (11 per cent).

While most young Arabs view their fellow Arab nations as allies, particularly the UAE (93 per cent ally) Egypt (84 per cent ally) and Saudi Arabia (80 per cent ally) perceptions towards the US and Iran are polarised, with 59 per cent viewing the US as an adversary, and 67 per cent viewing Iran as an adversary.

Looking globally, young Arabs see the US as the non-Arab country that has most increased its influence in the Middle East in recent years, although that influence viewed as malign by many young people in the region.

Asked which non-Arab country has increased its influence most over the past five years, regardless of that country being seen as an ally or an enemy, 48 per cent of young Arabs said the US, followed by Turkey (23 per cent) and Russia and Iran (both 13 per cent).

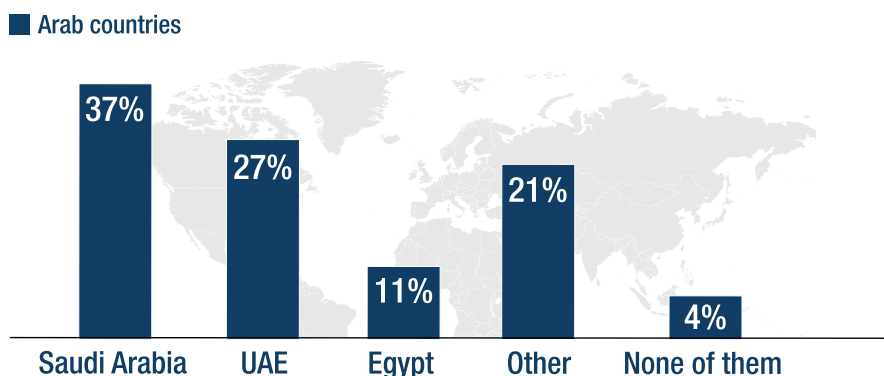
A majority of young Arabs say that the death of Jamal Khashoggi last year will have no long-term negative impact on Saudi Arabia's image abroad. Almost two-thirds, 60 per cent, of young Arabs say there will either be no impact or only a temporary impact on how Saudi Arabia will be perceived internationally or within the Arab world.

The share of young Arabs viewing the US as an adversary has nearly doubled since 2016, when just under a third of young Arabs (32 per cent) viewed the US as an enemy. At the same time as attitudes toward the US have hardened, Russia has slightly boosted its perception in the region, with two-thirds (64 per cent) of young people now seeing Russia as an ally, compared with 60 per cent in 2016.

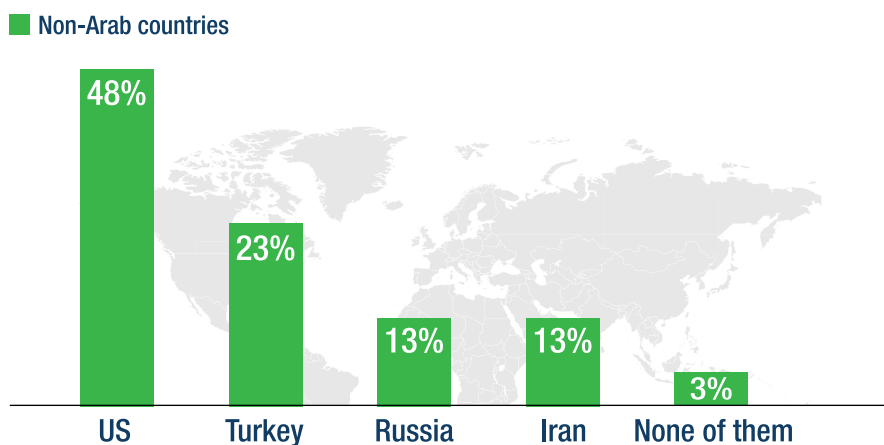
When asked whether US or Russia is a stronger ally of their country, young Arabs are split between the two powers, with 38 per cent saying the US is a stronger ally, 37 per cent choosing Russia, and 25 per cent saying that neither of the two countries is an ally. The regional splits show that GCC youth are somewhat polarised, with 45 per cent saying the US, compared with 38 per cent citing Russia, while North African youth are more negative towards Russia, with 39 per cent choosing the US over 27 per cent for Russia. In the Levant, youth are considerably more pro-Russia, with 45 per cent saying Russia is the stronger ally, against 29 per cent saying the US.

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 OF WHETHER YOU CONSIDER THESE COUNTRIES AS ALLIES OR ENEMIES OF YOUR COUNTRY.

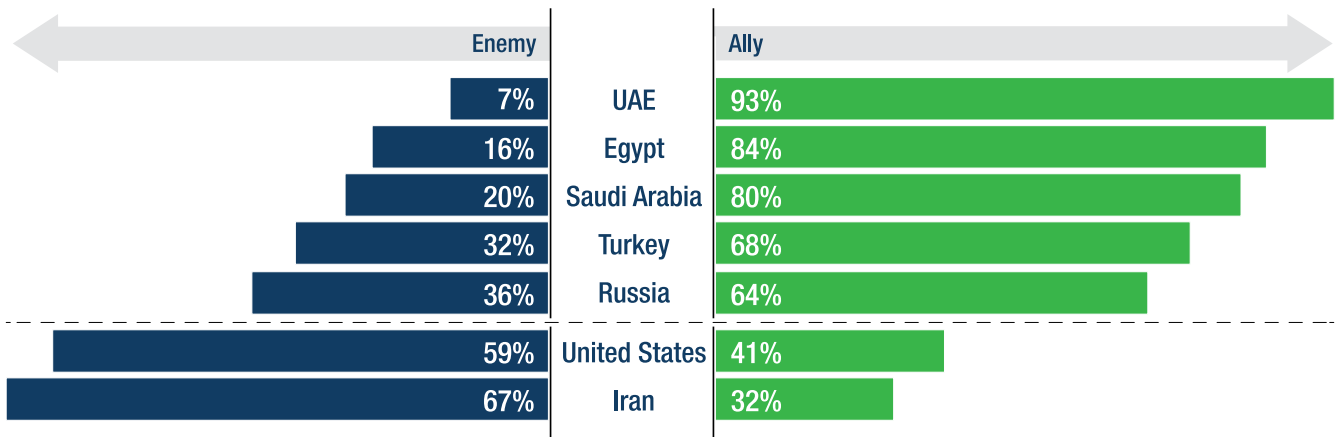


WHICH OF THE FOLLOWING [NON-ARAB] COUNTRIES HAS INCREASED ITS INFLUENCE ON THE ARAB WORLD THE MOST OVER THE PAST FIVE YEARS? PLEASE ANSWER THIS QUESTION REGARDLESS OF WHETHER YOU CONSIDER THESE COUNTRIES AS ALLIES OR ENEMIES OF YOUR COUNTRY.



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



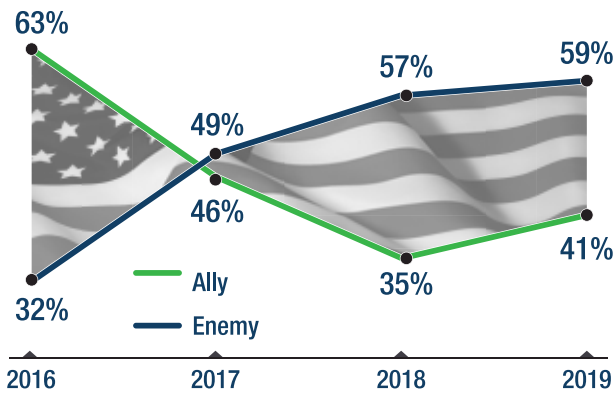
Saudi Arabia is perceived in the Arab world



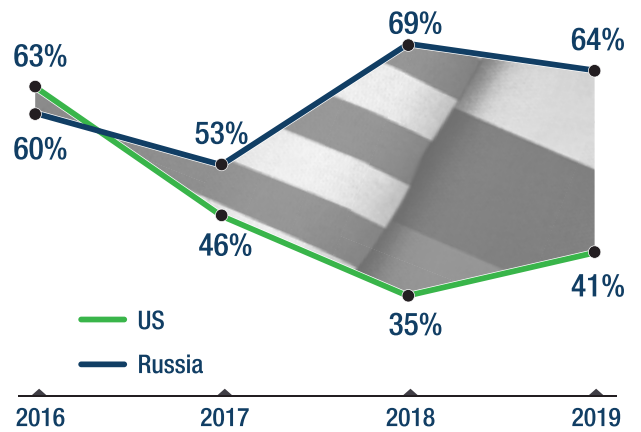
■ No real negative impact
 ■ A temporary negative impact
 ■ A long-term negative impact
 ■ Don't know

THE SHARE OF YOUNG ARABS VIEWING THE US AS AN ADVERSARY HAS NEARLY DOUBLED SINCE 2016, WHILE RUSSIA'S STOCK HAS RISEN

DO YOU CONSIDER THE UNITED STATES A STRONG ALLY, SOMEWHAT OF AN ALLY, SOMEWHAT OF AN ENEMY, OR A STRONG ENEMY OF YOUR COUNTRY?

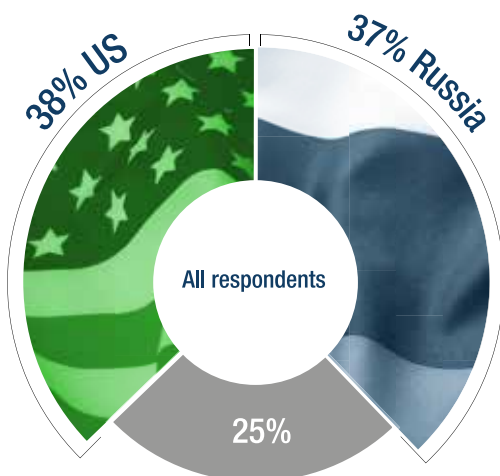


DO YOU CONSIDER _____ A STRONG ALLY, SOMEWHAT OF AN ALLY, SOMEWHAT OF AN ENEMY, OR A STRONG ENEMY OF YOUR COUNTRY?



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



5 CONFLICTS

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

Young Arabs view various regional conflicts as some of the biggest obstacles facing the Middle East today and are keen to see an end to long-standing issues.

A lack of Arab unity is viewed as the third biggest challenge to the Middle East, chosen by one-in-three young Arabs (35 per cent), while the Palestinian-Israeli conflict and the Syrian civil war are each seen as a top obstacle by 28 per cent.

The Palestinian-Israeli conflict remains a real source of concern for many young Arabs, with 79 per cent of young Arabs saying they are 'somewhat' or 'very concerned' about the conflict – a figure that has remained relatively constant over the past four years.

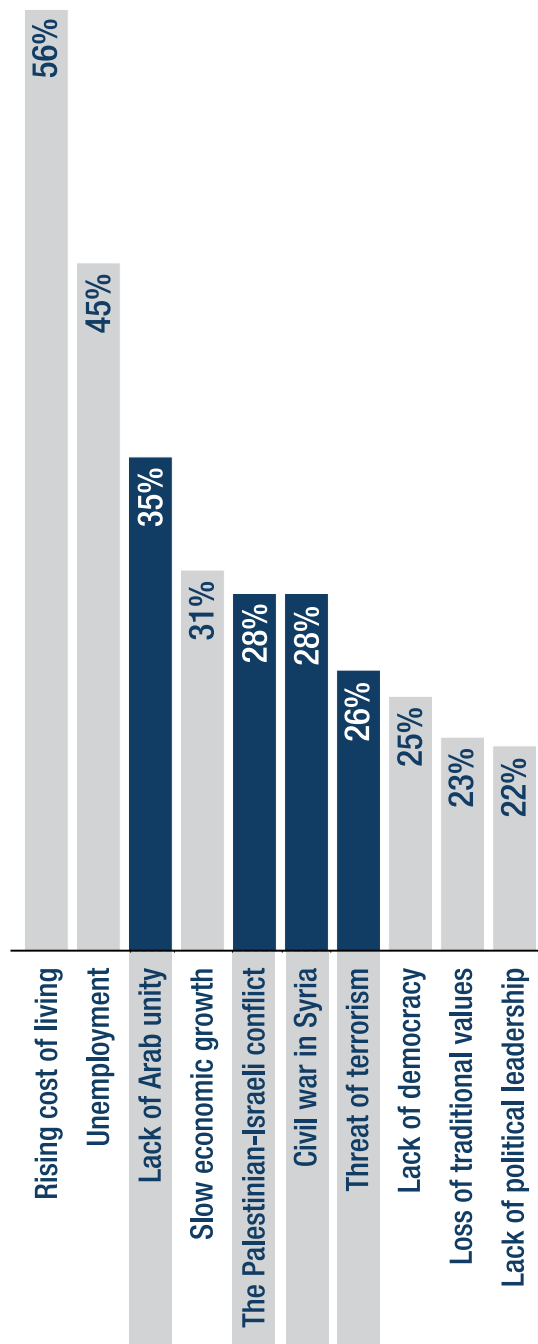
On the Syrian civil war, most young Arabs are keen to see the conflict end, regardless of the closing position of the Assad regime. Given two scenarios – 'that the war should end whether Bashar Al Assad stays in power or not' and 'that the war should not end until Syrian people can freely elect their leaders' – three quarters (73 per cent) of young Arabs said they want to see an end to the conflict now, against 26 per cent who would want to see a commitment to free elections before the war ends. The desire to see the conflict end was universal, with 76 per cent of youth in the GCC, 73 per cent in the Levant and 70 per cent in North Africa opting for a swift conclusion.

There is an increasing perception among young Arabs that tension between the Sunni and Shia branches of Islam are increasing. In 2016, fewer than half of those surveyed (47 per cent) said relations between Sunnis and Shias had worsened. This figure rises to 59 per cent in 2019, an 11 percentage point jump in the figure from just one year ago (48 per cent).

YOUNG ARABS VIEW ONGOING GEOPOLITICAL CONFLICTS WITHIN THE REGION AMONG THE TOP OBSTACLES FACING THE MIDDLE EAST

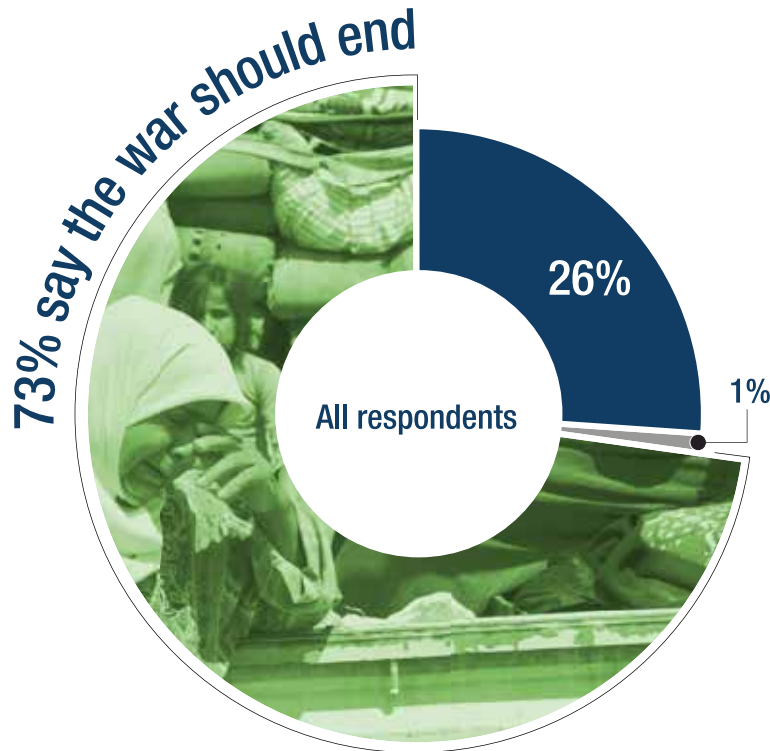
NOW THINKING ABOUT THE MIDDLE EAST, WHAT DO YOU BELIEVE IS THE BIGGEST OBSTACLE FACING THE MIDDLE EAST?

(Showing top 10 obstacles)



ARAB YOUTH ACROSS THE REGION SAY THE SYRIAN CIVIL WAR SHOULD END, REGARDLESS OF WHETHER BASHAR AL ASSAD STAYS IN POWER OR NOT

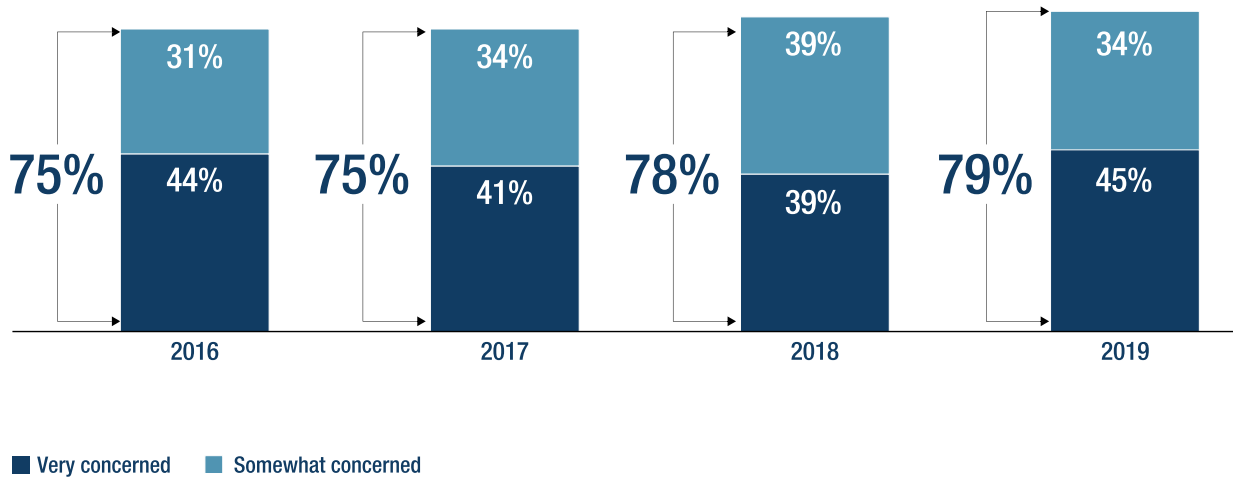
WHICH OF THE FOLLOWING IS CLOSER TO YOUR VIEW ABOUT THE CIVIL WAR IN SYRIA?



- The war should end regardless of whether Bashar Al Assad stays in power or not
- The war should not end until the Syrian people can freely elect their leaders
- Don't know

THE PALESTINIAN-ISRAELI CONFLICT REMAINS A REAL SOURCE OF CONCERN FOR MANY YOUNG ARABS

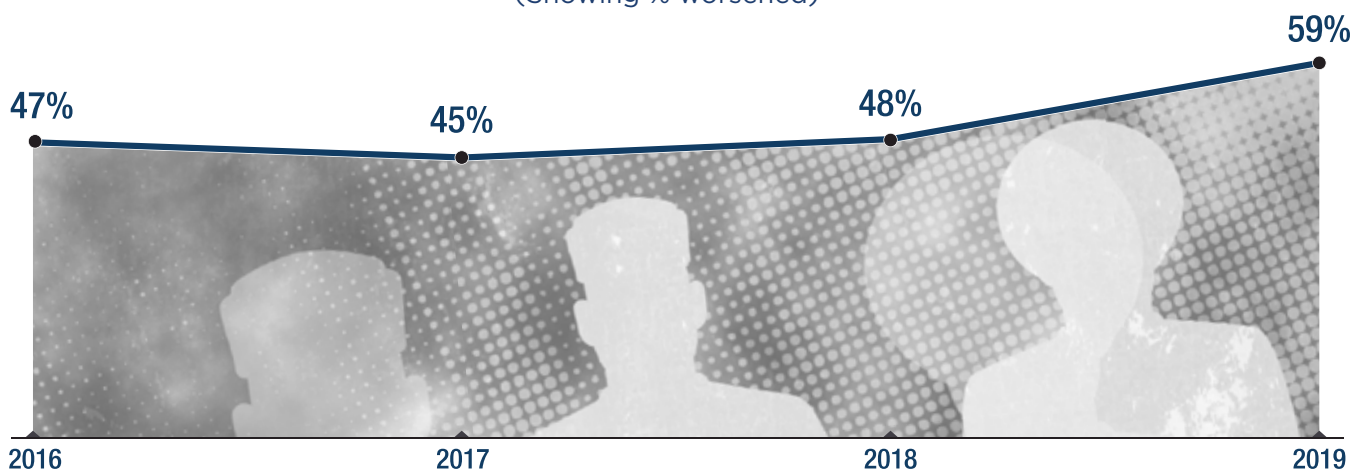
HOW CONCERNED WOULD YOU SAY YOU ARE ABOUT THE PALESTINIAN-ISRAELI CONFLICT?



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

For the eighth year running, the UAE has been identified by young Arabs as the country they would most like to live in and would most like their own nation to emulate. Not only that, but the UAE's popularity has also surged over the past four years, with 44 per cent of respondents in 2019 saying they would most like to live in the UAE, against 20 per cent in 2015.

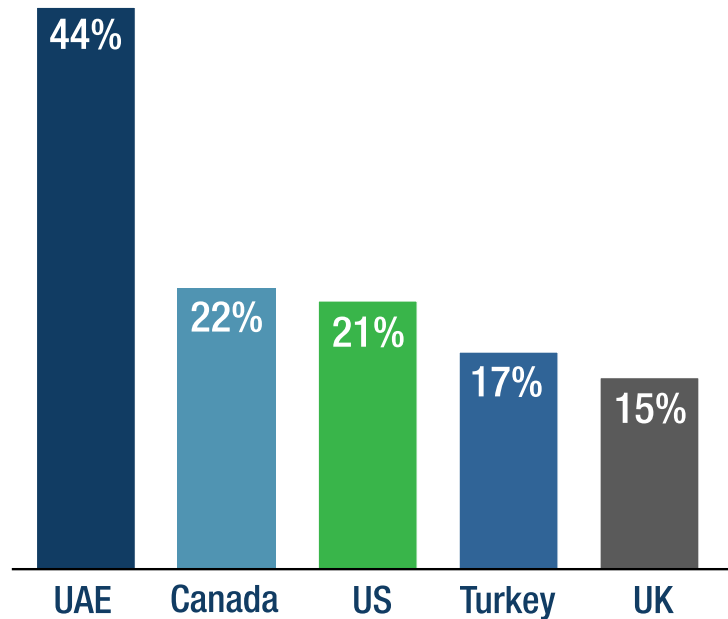
In 2019, the UAE has pulled ahead of other nations, with Canada, the next most popular nation, on 22 per cent, the US on 21 per cent, Turkey making its first appearance in the top five since 2013, on 17 per cent and the UK on 15 per cent.

As a country to emulate, again, the UAE has surged ahead, with 42 per cent of young Arabs choosing the nation. The US and Japan trail behind at 20 per cent, with Turkey chosen by 19 per cent and Canada on 18 per cent. This marks the first time since 2012 that a European country has not made the cut.

As in previous years, among Arab youth, the UAE is primarily associated with a wide range of job opportunities (identified by 38 per cent), safety and security (36 per cent), good salaries (30 per cent) and is widely seen as a good place to raise a family (22 per cent).

THE UAE IS THE TOP MODEL NATION TO LIVE IN 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?

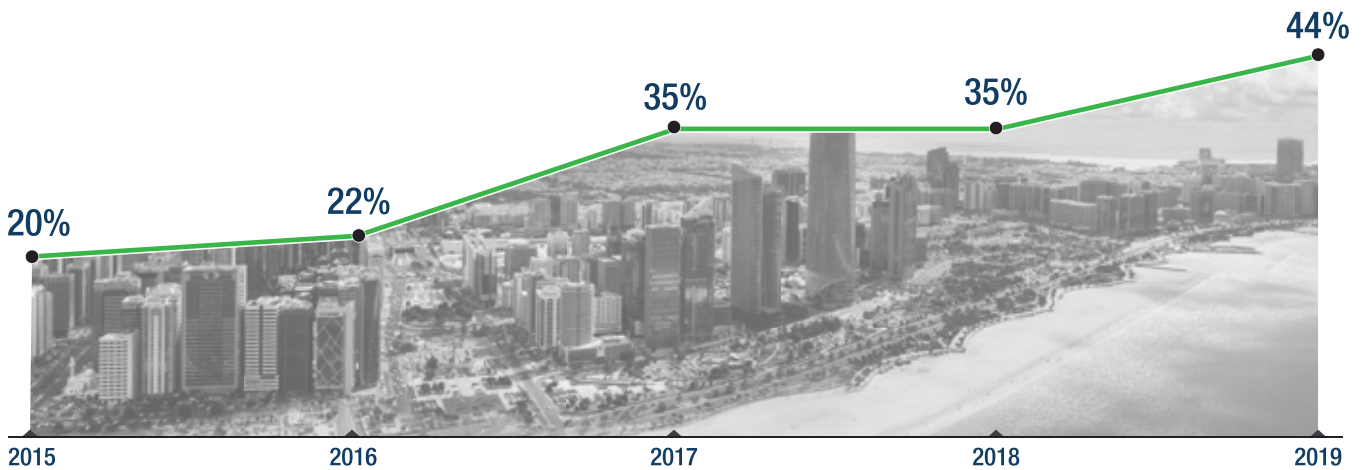


Top five countries to live in

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

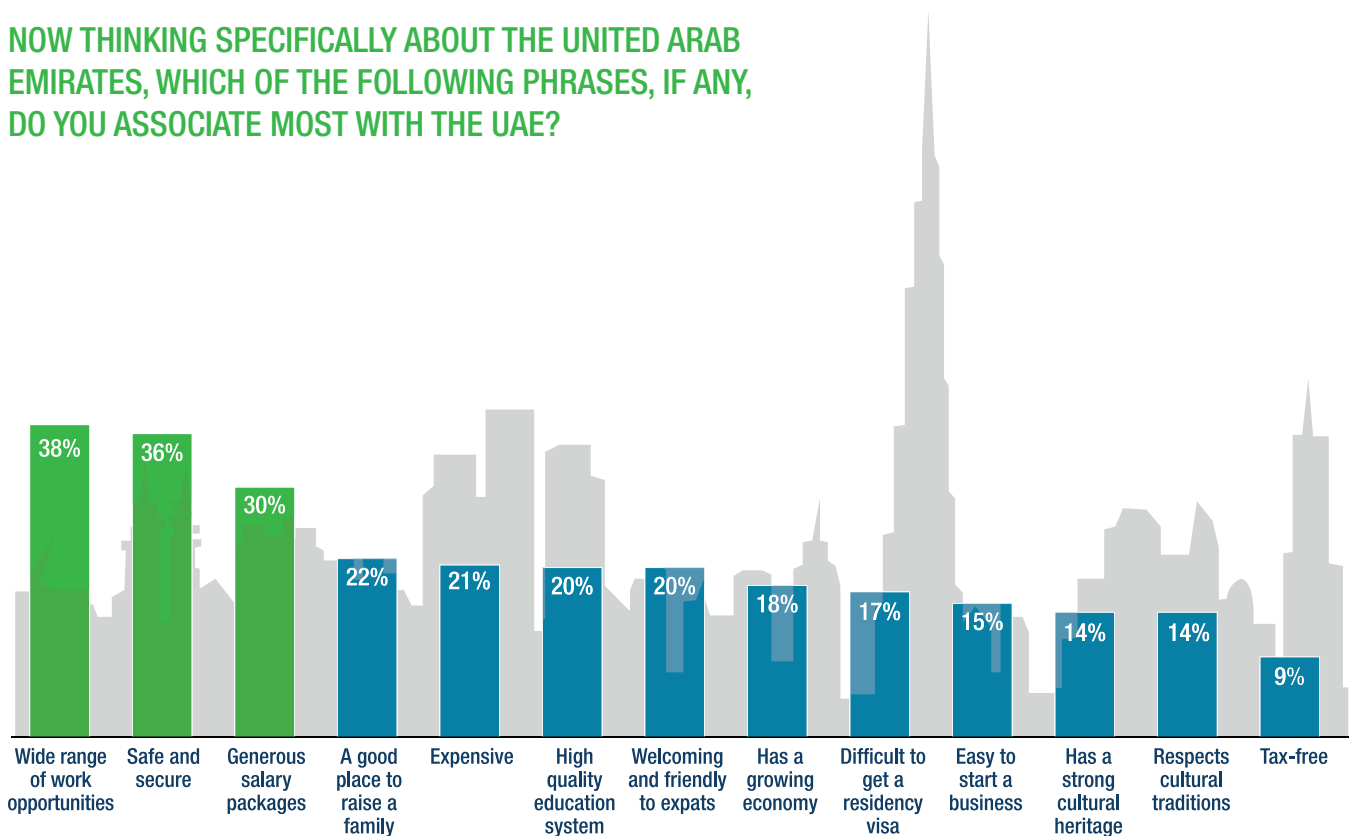
PERCEPTIONS OF THE UAE AS THE BEST COUNTRY TO LIVE IN HAVE SURGED OVER THE PAST FIVE YEARS

WHICH COUNTRY IN THE WORLD, IF ANY, WOULD YOU LIKE TO LIVE IN?



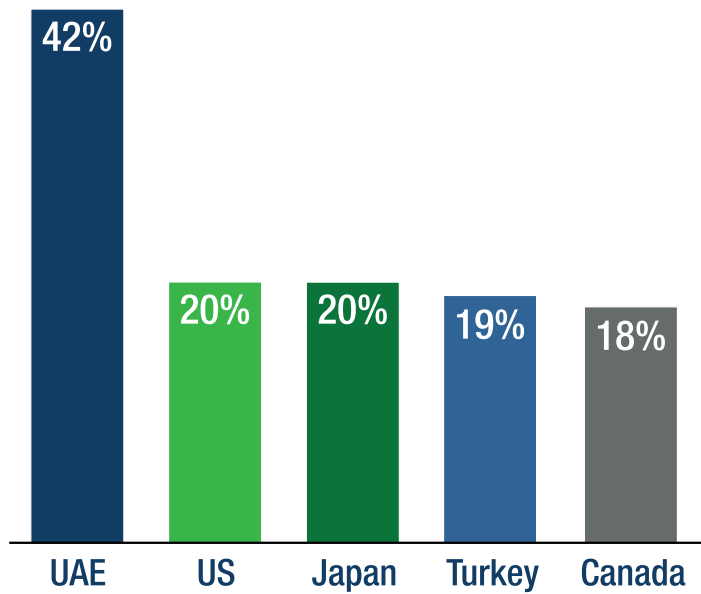
YOUNG ARABS ARE DRAWN TO THE UAE BY JOB OPPORTUNITIES AND SALARY PACKAGES, AS WELL AS SAFETY AND SECURITY

NOW THINKING SPECIFICALLY ABOUT THE UNITED ARAB EMIRATES, WHICH OF THE FOLLOWING PHRASES, IF ANY, DO YOU ASSOCIATE MOST WITH THE UAE?



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
US	France	US	US	US	US	US
France	US	Qatar	Germany	Germany	Canada	Canada
Turkey	Turkey	KSA	Canada	France	Germany	Japan
China	China	UK	France	UK	KSA	Germany



7

DRUG USE

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

A new question for 2019 found that more than half of young Arabs (57 per cent) believe drugs are easy to obtain in their home country. There is a marked difference in perception of availability, however, with only 32 per cent of young people in the GCC states saying drugs are easy to get hold of, against 68 per cent in North Africa, and 70 per cent in the Levant.

More than half (57 per cent) of young Arabs also believe that drug use is on the rise in their country, while merely 18 per cent say drug usage is declining. Again, there is a split between young Arabs living in the GCC, where 36 per cent see drug use on the rise and 30 per cent see it declining, and the Levant, where three quarters (76 per cent) of those surveyed say drug use is on the rise, and just 13 per cent say it is declining.

Young Arabs say that peer pressure is the top reason why young people start using drugs, with 62 per cent of those surveyed citing encouragement by friends at school or work as the number one reason why they think young people start using drugs. Other factors behind drug use include stress relief, cited by 45 per cent; ease of access to drugs (43 per cent); boredom (43 per cent); and lack of entertainment options (41 per cent).

Young Arabs take a generally hard-line view on how to tackle the challenges posed by drug abuse – although they don't believe there is a simple, single solution to the problem.

Given the option to select from a list of a number of possible strategies and tactics to fight drug abuse, 63 per cent said stricter laws were needed to reduce drug usage, and 58 per cent said more efficient law enforcement was needed.

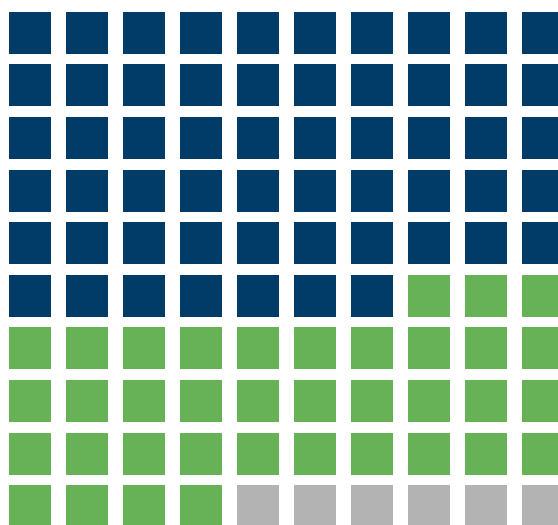
Better education and awareness of the negative effects of drugs was seen as the best route by 54 per cent of young Arabs, while more rehabilitation and counselling was seen as the answer by 50 per cent.

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?

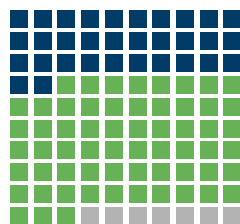
All respondents

57%



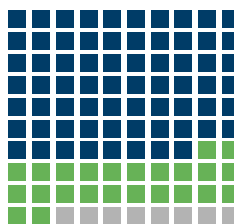
GCC

32%



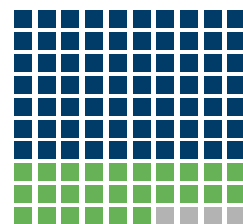
North Africa

68%



Levant

70%



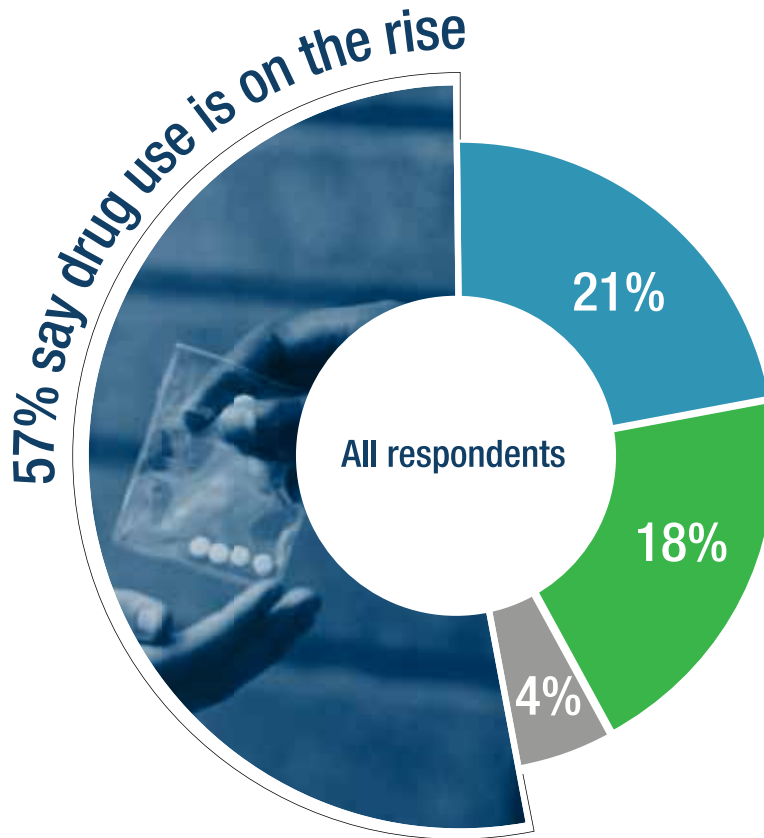
■ Drugs are easy to get in my country

■ 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?



GCC



North Africa



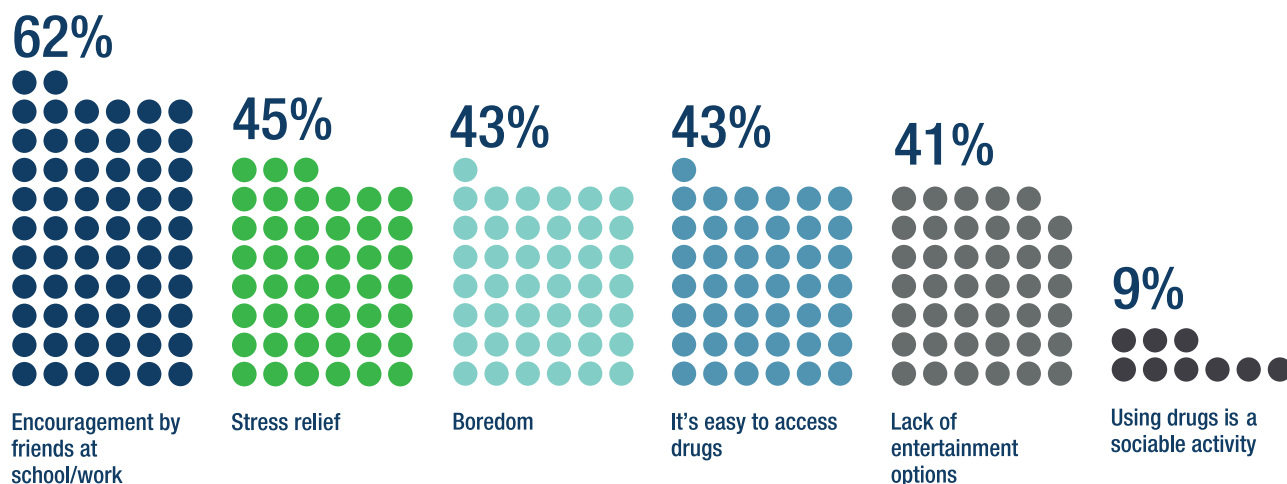
Levant



- The number of young people using drugs is on the rise
- Staying the same
- The number of young people using drugs is declining
- Don't know

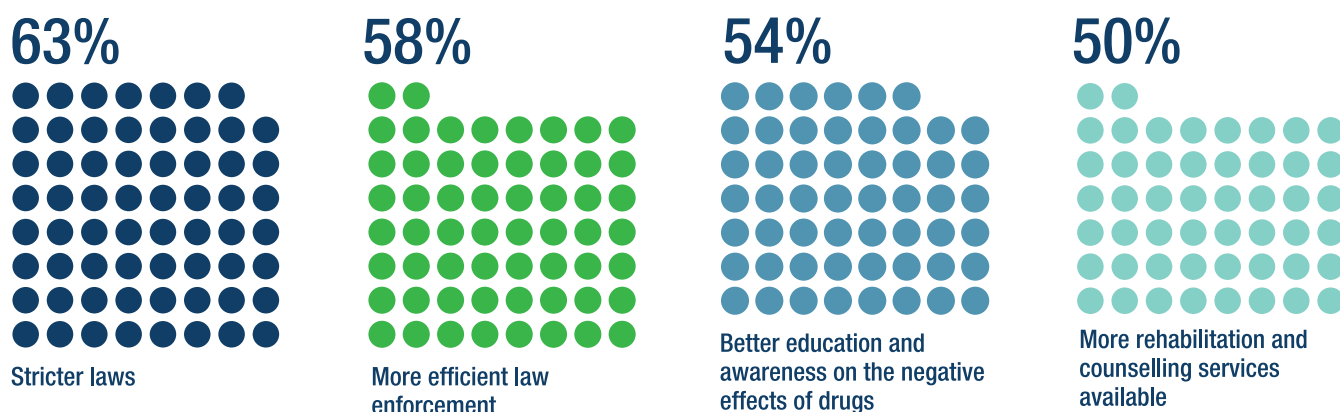
ARAB YOUTH VIEW PEER PRESSURE AS THE TOP DRIVER OF DRUG USE; MANY ALSO POINT TO STRESS RELIEF AND BOREDOM

WHY DO YOU THINK YOUNG PEOPLE START USING DRUGS?



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 USE IN YOUR COUNTRY?





MENTAL HEALTH

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

Another new section for 2019 sheds light on a somewhat taboo subject in the Middle East: that of mental health. Young Arabs are familiar with the issues surrounding mental health, and many personally know people affected by mental health problems.

Asked: 'Do you know anyone who is suffering from mental health issues, such as anxiety and depression?' almost a third of young Arabs (31 per cent) said they did and 69 per cent said they did not, with broadly similar responses from across the region.

Regarding access to treatment, young people in the Levant say quality mental health care is difficult to access, with 81 per cent saying it would be hard to get quality medical care for mental health issues, such as anxiety or depression, in their country, against 54 per cent for young Arabs as a whole, and 52 per cent in North Africa. Youth in the Gulf fare much better than the mean, with almost two-thirds (67 per cent) saying it's easy to access quality mental health care in their country and fewer than a third (28 per cent) saying it is difficult.

Young Arabs are divided over whether there is a stigma attached to mental health issues in the Middle East, with 50 per cent saying they believed mental health issues were viewed as a negative thing by most people, while 49 per cent believe such issues would be viewed as normal by most people.

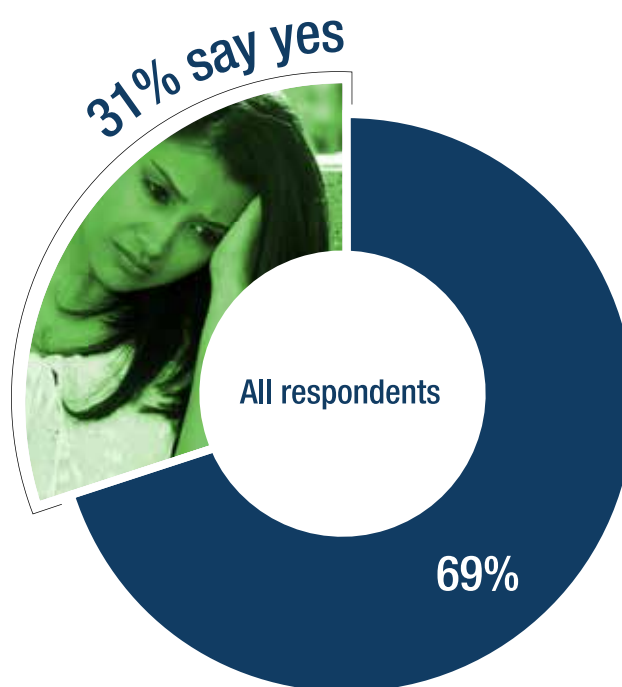
Youth in the GCC were most likely to be accepting of mental health issues, with 62 per cent saying these were a normal thing, against 36 per cent who said they could be viewed as negative. In North Africa, only one third (33 per cent) thought people viewed mental health issues as normal, against 65 per cent who said people view them as negative, while Levant was split on the issue - 50 per cent say such issues can be seen as normal, while 49 per cent say they could be viewed as negative).

Looking at possible triggers for anxiety and depression among young Arabs, respondents were asked to identify the biggest source of stress in their daily life from a range of options. The answers revealed a divide between triggers in the GCC nations and those in the Levant, with an almost opposite response. For example, personal relationships were identified as the main source of stress by 28 per cent of youth in the GCC, and just 11 per cent of youth in the Levant.

Meanwhile, 28 per cent of youth in the Levant said lack of security and safety was the biggest cause of stress in their daily lives, against just 10 per cent of youth in the GCC. For GCC youth, academic concerns also ranked high, selected by 21 per cent, but by just 13 per cent in the Levant. While a difficult financial situation preyed on the minds of 23 per cent of young people in the Levant, this was a key concern for just 11 per cent of GCC youth.

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



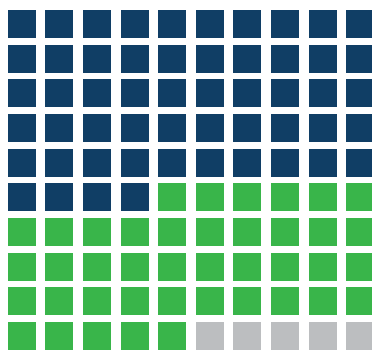
■ Yes ■ No

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?

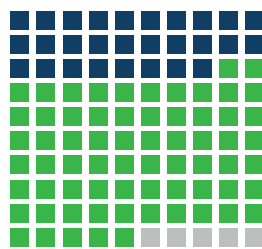
All respondents

54%



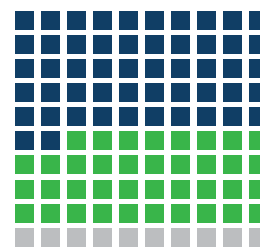
GCC

28%



North Africa

52%



Levant

81%

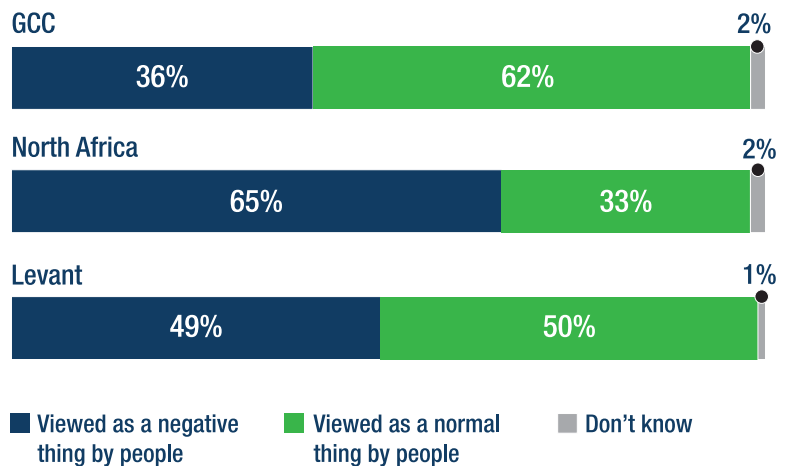
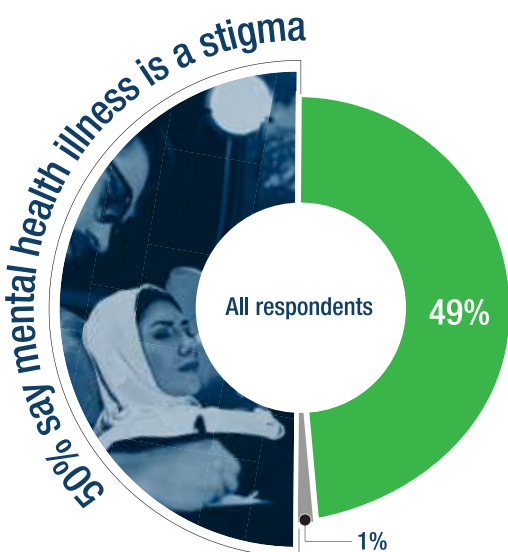


■ Difficult ■ Easy ■ Don't know

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?

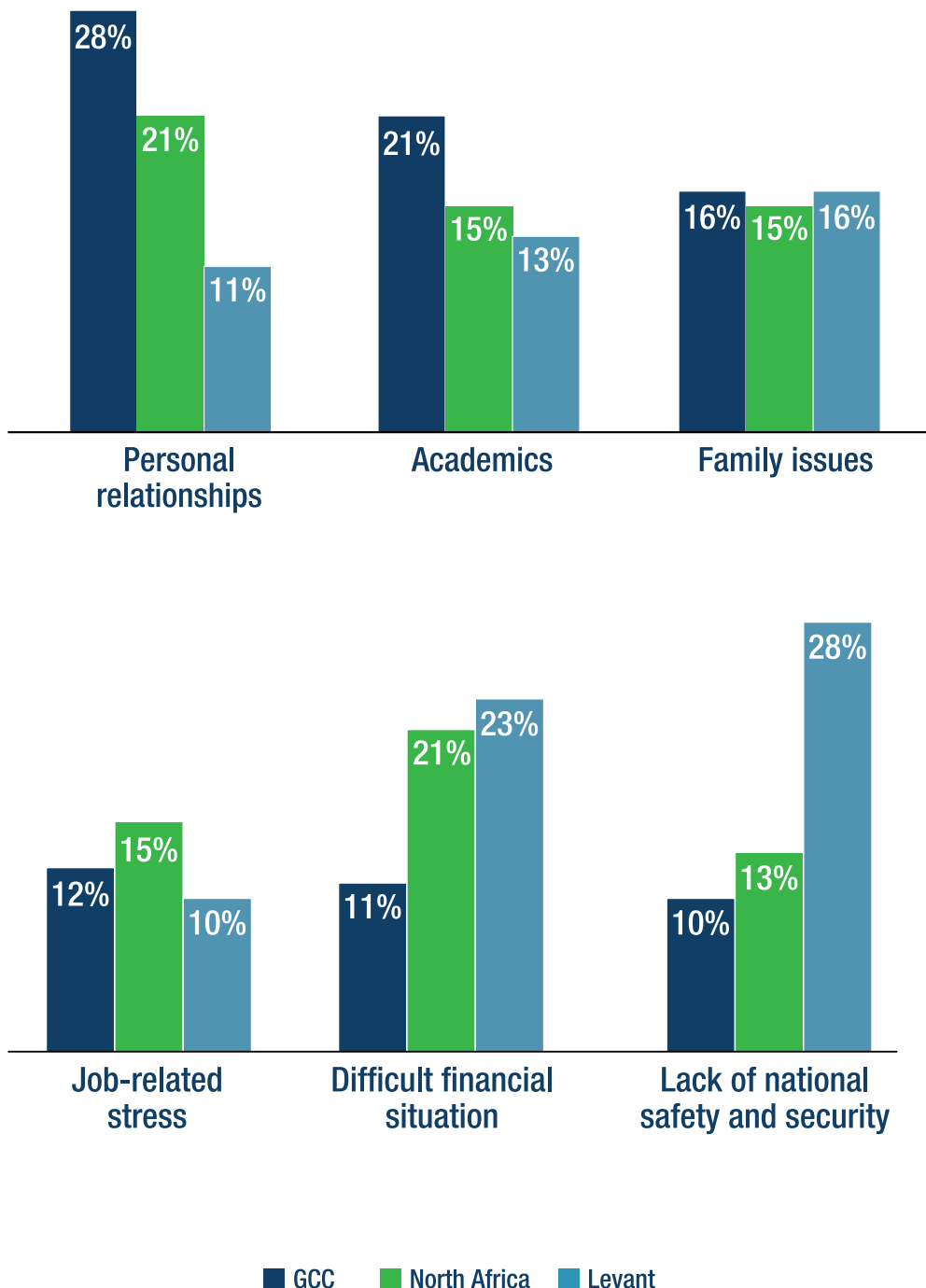
“In my country, seeking medical care for mental health issues, such as anxiety or depression, is...”



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

Young Arab shoppers are increasingly turning to the internet for purchases, especially for clothing, food and luxury items. More than two-thirds (71 per cent) of youth polled across the GCC, the Levant and North Africa revealed that they had shopped online either 'monthly' or 'less frequently' – an increase of 18 percentage points from the 2018 survey, which found that just over half (53 per cent) of respondents had shopped online.

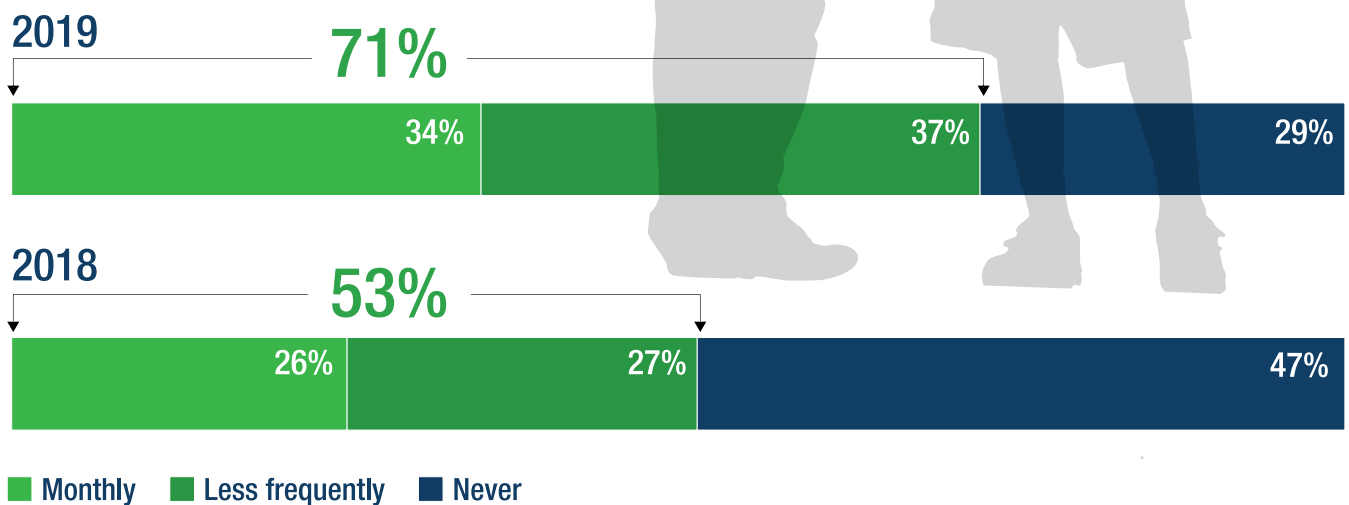
Of the types of goods and products purchased online, clothing was the most popular category at 47 per cent, followed by food (prepared meals) at 37 per cent, electronics (33 per cent), cosmetics (28 per cent), travel (flights or hotels) at 20 per cent, books (19 per cent), luxury goods (e.g. jewellery) at 12 per cent, home furniture (12 per cent) and groceries (12 per cent).

Credit and debit card payments for online transactions nearly caught up with cash-on-delivery this year, with 49 per cent of respondents preferring to use their card against 50 per cent who pay with hard currency on receipt of their goods. In last year's survey, cash payment was the preferred way to settle online transactions by 53 per cent, and credit card payments were the less popular option at 47 per cent.

Of the 53 per cent of shoppers who prefer online payments, customers from the GCC formed the single largest majority at 65 per cent, followed by young Arabs from Levant at 43 per cent and those from North Africa at 35 per cent.

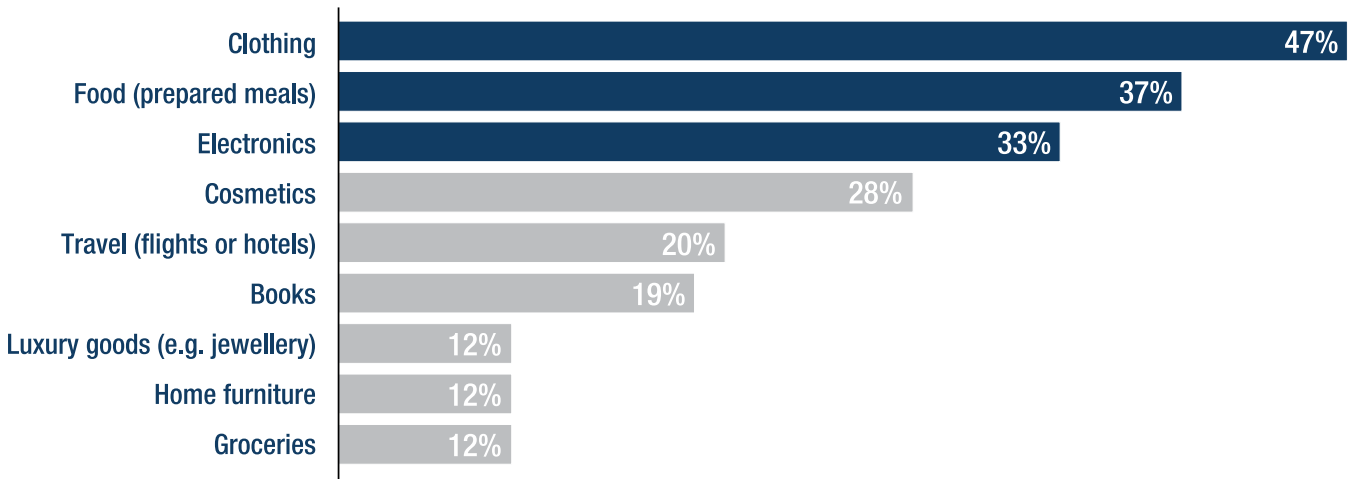
THE NUMBER OF YOUNG ARABS SHOPPING ONLINE HAS SPIKED SIGNIFICANTLY OVER THE PAST YEAR

HOW FREQUENTLY, IF AT ALL, DO YOU SHOP ONLINE?



CLOTHING, MEALS AND ELECTRONICS ARE THE KEY DRIVERS OF E-COMMERCE AMONG YOUNG ARABS

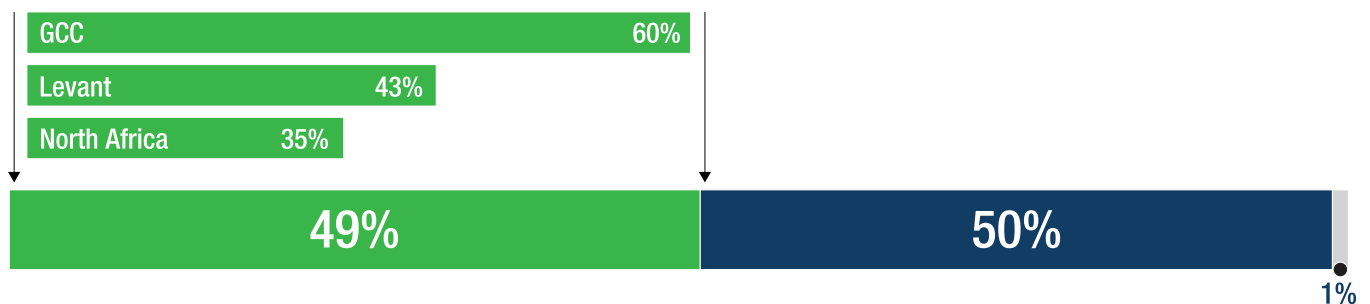
WHICH OF THE FOLLOWING PRODUCTS OR SERVICES, IF ANY, HAVE YOU PURCHASED ONLINE?



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

This year's Survey reveals that over the past five years, social media has become the dominant source for news among Arab youth, with 80 per cent polled saying that it was their preferred choice, compared with 25 per cent of those surveyed in 2015. The second most popular source of news among this demographic is television at 66 per cent (60 per cent in 2015), followed by online news at 61 per cent (40 per cent), friends and family at 42 per cent (29 per cent), newspapers at 27 per cent (22 per cent), radio at 19 per cent (10 per cent) and magazines at 9 per cent (8 per cent).

The six leading categories for sources of news registered an increase in percentages from 2015, with the first category social media recording the largest jump – up 55 percentage points. This is in comparison to television, the second most popular, which recorded a six-percentage point rise. The least most popular category, magazines, recorded a small 1 percentage point rise.

Facebook is the source most young people turn to for daily news updates, with 50 per cent of young people choosing the social media platform, against 39 per cent for online news portals, 34 per cent for TV news channels and just 4 per cent who turn to newspapers.

Social media is trusted 'to do the right thing' more than traditional media among young Arabs, with 60 per cent stating they had trust in social media (to do the right thing); 23 per cent expressing distrust and 17 per cent saying they don't know – a net trust figure of +37. This compares with 55 per cent of respondents saying they had trust in traditional media (TV, newspapers, radio), 30 per cent having distrust and 15 per cent not knowing – a net trust figure of +25 per cent.

Social media is becoming ever more dominant in the lives of youth in the Middle East, with 9 out of 10 young Arabs using at least one of the major social media channels daily. WhatsApp is the preferred social channel in the GCC, with 96 per cent of respondents saying they used the messaging app daily. Facebook is the preferred channel in North Africa, with 88 per cent daily users, pushing WhatsApp into second place (70 per cent.) Users in Levant marginally prefer WhatsApp over Facebook, with figures recording daily use in this region at 89 and 88 per cent respectively.

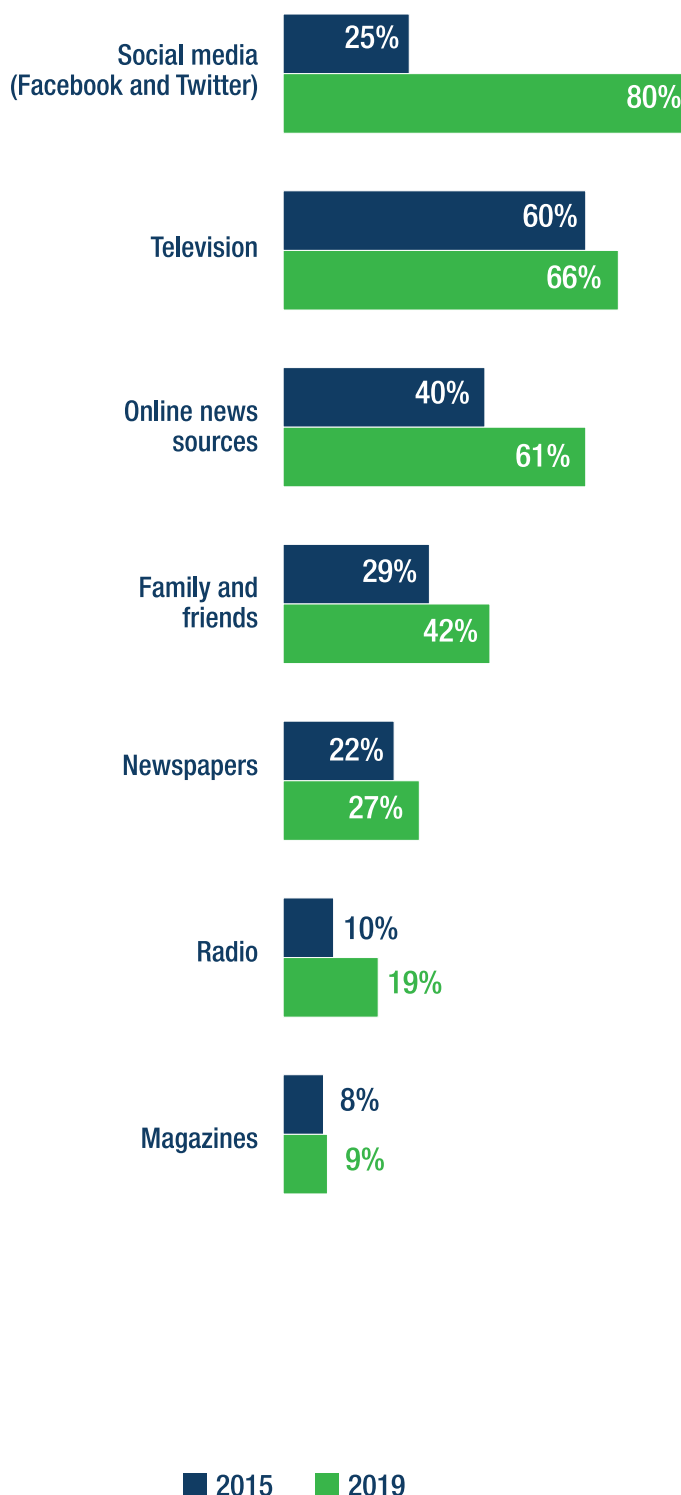
YouTube is the third most popular social media channel in North Africa and the Levant at 65 per cent and 77 per cent respectively, with Instagram in fourth place in both regions (55 per cent and 68 per cent respectively). The placings are reversed in the GCC, where Instagram is slightly more popular than YouTube (79 per cent compared to 76 per cent).

Asked which platform was the most important to them, youth in North Africa overwhelmingly selected Facebook (56 per cent) with WhatsApp a distant second at 19 per cent and both Twitter and Snapchat chosen by just 2 per cent.

Facebook was also the most popular in the Levant (37 per cent) but trailed WhatsApp in the GCC, with the messaging platform on 30 per cent and Facebook on 20 per cent.

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

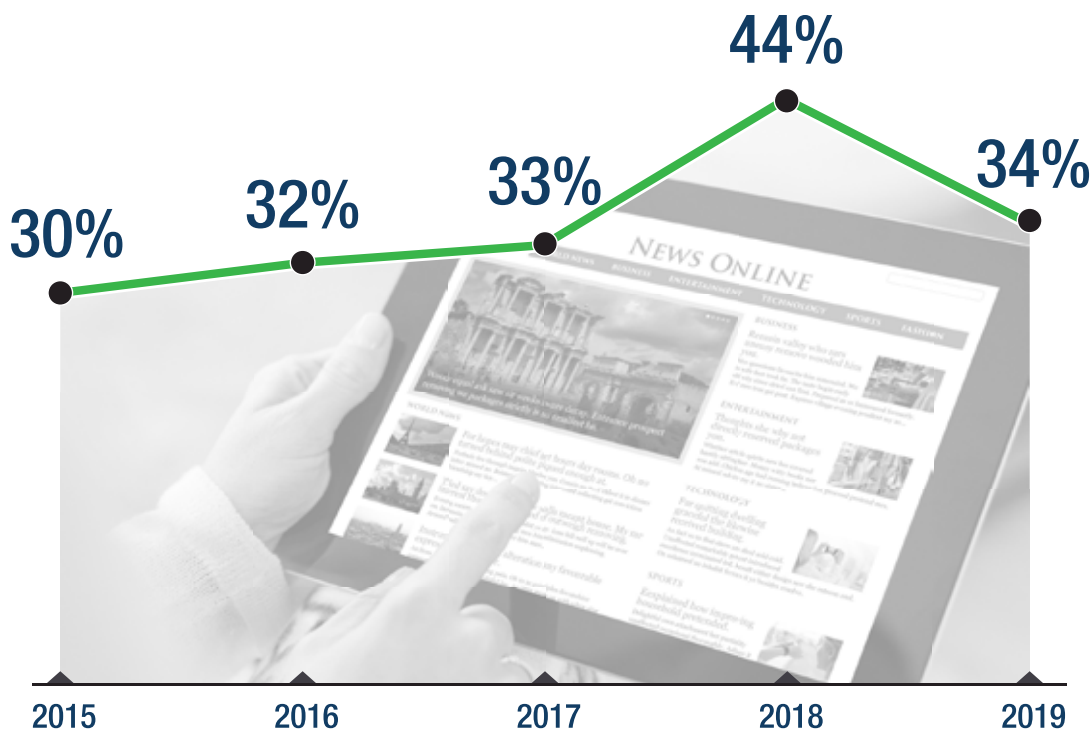
WHERE DO YOU GET YOUR NEWS?



GENERAL NEWS CONSUMPTION HAS REMAINED LARGELY STABLE SINCE 2015, WITH SOCIAL MEDIA OVERTAKING TV AS THE MOST IMPORTANT NEWS CHANNEL FOR THE INFORMED ARAB YOUTH

HOW OFTEN DO YOU UPDATE YOURSELF ON NEWS AND CURRENT AFFAIRS?

(Showing % 'Daily')



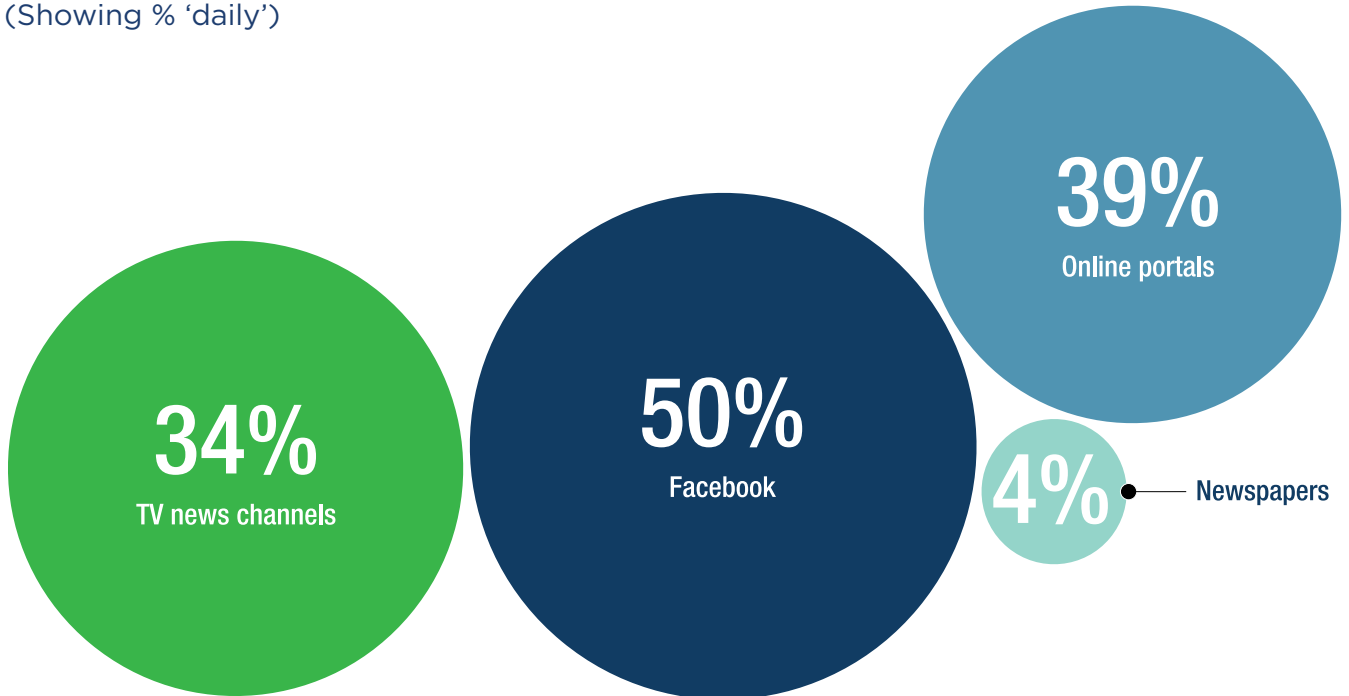
Top news sources for informed Arab youth

2015	2016	2017	2018	2019
TV	TV	TV	Social media	Social media
Online news	Online news	Online news	TV	TV
Social media	Social media	Social media	Online news	Online news
Family/friends	Family/friends	Family/friends	Family/friends	Family/friends
Newspapers	Newspapers	Newspapers	Radio	Newspapers
Radio	Radio	Radio	Newspapers	Radio
Magazines	Magazines	Magazines	Magazines	Magazines

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?

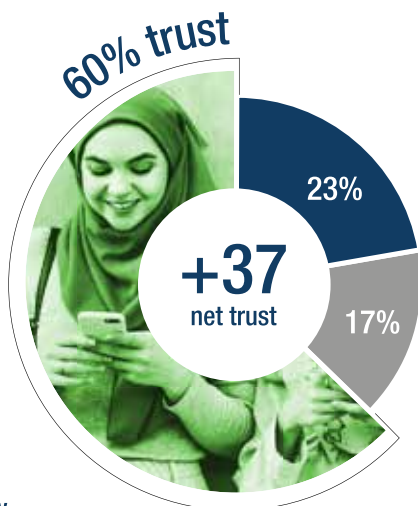
(Showing % 'daily')



AMONG YOUNG ARABS, SOCIAL MEDIA IS TRUSTED MORE THAN TRADITIONAL MEDIA

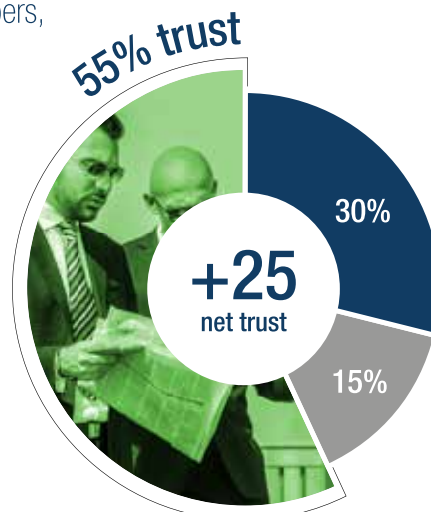
HOW MUCH DO YOU TRUST THE FOLLOWING TO DO THE RIGHT THING?

Social media



Traditional media

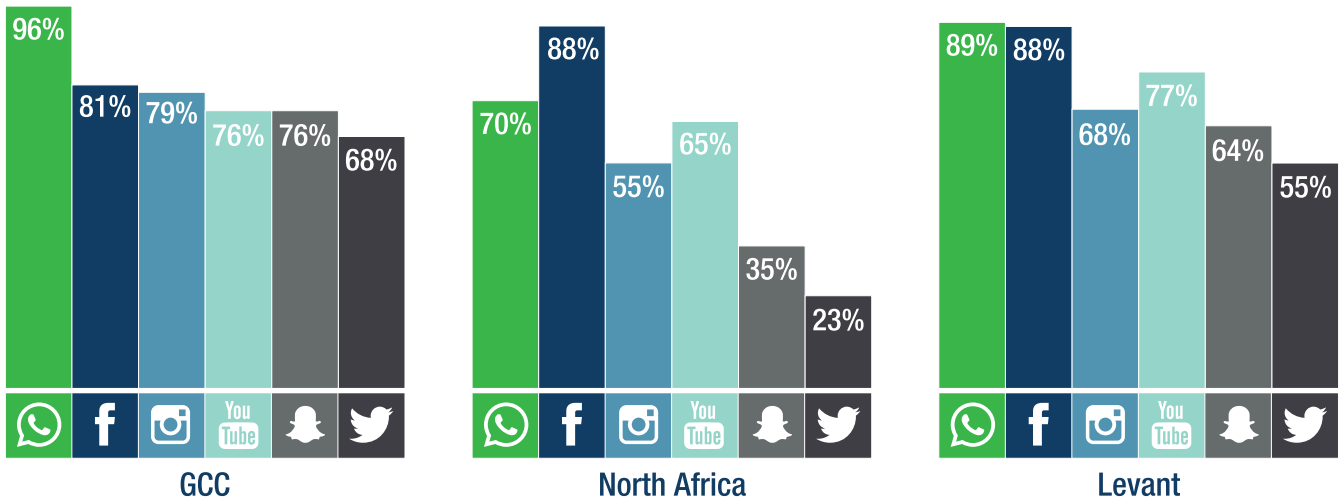
(TV, newspapers, radio)



- Trust
- Distrust
- Don't know

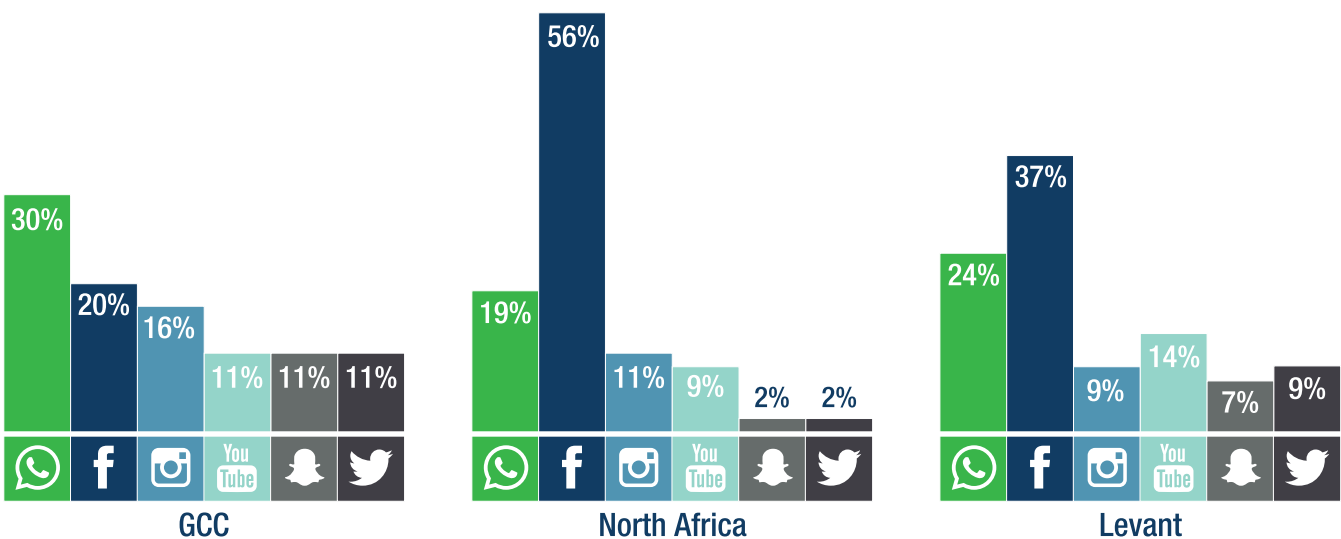
NINE IN TEN YOUNG ARABS USE AT LEAST ONE OF THE MAJOR SOCIAL MEDIA CHANNELS DAILY

HOW OFTEN DO YOU VISIT EACH OF THE FOLLOWING?



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?





ABOUT US



ASDA'A was founded in 2000 as an independent agency by Sunil John, who continues to lead in the agency's 20th year. In 2008, WPP acquired a majority stake in the firm. ASDA'A became an integral part of the Burson-Marsteller global network. After the recent merger of Burson-Marsteller and Cohn & Wolfe to create Burson Cohn & Wolfe, the firm is now ASDA'A BCW. Today, the agency employs more than 160 professionals across nine wholly owned offices and seven affiliates in 15 Middle East & North Africa (MENA) countries. The Agency now serves more than 100 retained clients in the region and is the leading PR consultancy in MENA.

www.asdaa-bcw.com



PSB is a full-service custom research and analytics consultancy that connects data-driven insights with human experience to solve clients' most critical challenges. With a heritage in political polling, PSB brings the agility of campaign strategy to research and consulting across a range of industries, including technology, healthcare, financial services and entertainment. PSB is a member of the BCW Group of companies, which is a part of WPP (NYSE: WPP), the world leader in communications services.

www.psbresearch.com



BCW (Burson Cohn & Wolfe) is one of the world's largest full-service global communications agencies. Founded by the merger of Burson-Marsteller and Cohn & Wolfe, BCW delivers digitally and data-driven creative content and integrated communications programs grounded in earned media and scaled across all channels for clients in the B2B, consumer, corporate, crisis management, CSR, healthcare, public affairs and technology sectors. BCW is a part of WPP (NYSE: WPP), the world's leader in communications services.

www.bcw-global.com



Proof Communications, a subsidiary of ASDA'A BCW, brings a whole new approach to communications that leverages cutting-edge skills in branding, design, digital and social media. From informed social media strategy to compelling websites and creative ads, annual reports and more, Proof helps our clients connect, engage and deliver business results.

www.proof-communications.com

SOCIAL, ECONOMIC AND SOCIAL MEDIA INDICATORS 2019

Country	Population (million)	GDP PPP (US\$ billion – 2019 est.)	Contribution of oil to GDP (%)	Youth (15 to 24 years) unemployment (% of total labour force)	Internet users (million & Penetration; 2019)	Active social media users (million & penetration; 2019)	Mobile subscriptions in (million & penetration; – 2019)	Mobile social media users (million & penetration; – 2019)
GCC								
Bahrain	1.64	75.18	18.4	5.7	1.54 (96%)	1.3 (81%)	2.63 (164%)	1.10 (69%)
Kuwait	4.25	340.1	45 to 50	14.7	4.14 (98%)	3.9 (92%)	7.1 (168%)	3.1 (73%)
Oman	5	208.8	37	8.4	3.78 (76%)	2.5 (50%)	6.66 (135%)	1.9 (39%)
Saudi Arabia	34.14	1,914.6	44	25.1	30.26 (88%)	23 (67%)	43.8 (129%)	16 (47%)
United Arab Emirates	9.68	768.32	25.9	5.0	9.52 (99%)	9.52 (99%)	19.23 (200%)	8.8 (92%)
GCC Total	54.71	3307						

LEVANT & OTHER MIDDLE EAST								
Jordan	10.1	97.6	NA	40.6	8.7 (87%)	5.8 (58%)	7.97 (79%)	5.4 (54%)
Iraq	40.41	719.97	65	16.9	19.68 (48%)	19 (47%)	38.22 (96%)	18 (45%)
Lebanon	6.1	95.67	NA	17.9	5.55 (91%)	4 (66%)	4.65 (76%)	3.8 (63%)
Palestine	5.2	13.7*	NA	49.6*	3.06 (60%)	1.9 (37%)	4.29 (84%)	1.9 (37%)
Yemen	29.58	88.42	25	26.1	7.19 (25%)	2.3 (7.9%)	18.4 (63%)	2.1 (7.2%)
Levant & other ME Total	91.39	1,015.36						

NORTH AFRICA								
Algeria	42.68	669.71	30	24.3	24.5 (58%)	23 (54%)	49.5 (117%)	21 (50%)
Egypt	101.12	1,372.62	NA	34.3	49.23 (49%)	40 (40%)	93.5 (93%)	38 (38%)
Libya	6.57	85.55	60	42.3	4.5 (69%)	4.5 (69%)	11.22 (172%)	4.3 (66%)
Morocco	36.64	334.95	NA	17.9	22.6 (62%)	17 (47%)	43.76 (120%)	16 (44%)
Tunisia	11.79	150.97	NA	36.3	7.9 (66%)	7.5 (64%)	17.55 (150%)	6.9 (59%)
North Africa total	198.8	2,613.8			104.53	87	87	

Sources:

- Population: <http://worldpopulationreview.com/countries/>
- GDP: International Monetary Fund - <https://bit.ly/2H5RBUL>; Trading Economics; <http://www.tradingeconomics.com>; GDP of Palestine is for 2017 and issued by the Palestinian Monetary Authority
- Share of oil in GDP: UAE – Minister of Economy; <https://bit.ly/2U6RoMX>; Bahrain – Bahrain Economic Development Board; Oman – Government Budget 2019 - <https://bit.ly/2VobrDB>; <https://home.kpmg.com/en/home/insights/2019/01/2019omanbudget.html>; Saudi Arabia – 2019 Government Budget & KPMG; <https://home.kpmg/content/dam/kpmg/sa/pdf/2018/kingdom-of-saudi-arabia-budget-report.pdf>; Iraq – World Bank Group Report;
- Youth unemployment: World Bank - <https://data.worldbank.org/indicator/slueem.1524.zs>; Palestinian Central Bureau of Statistics (youth unemployment among those aged 20 to 24) <http://www.pcbs.gov.ps/post.aspx?lang=en&itemID=3135>
- Internet users & penetration: <http://www.internetworldstats.com>; Social media penetration - <https://datareportal.com> Most Active Social Media Platforms