

Algeria
Bahrain
Egypt
Iraq

Jordan
Kuwait
Lebanon
Libya

Morocco
Oman
Palestine
Qatar

Saudi Arabia
Tunisia
UAE
Yemen

ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2015

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7th Annual ASDA'A Burson-Marsteller Arab Youth Survey

“With the legacy of the Arab Spring waning, Arab youth are uncertain whether democracy could ever work in the Middle East”

ASDA'A Burson-Marsteller



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CONTENTS

2	Letter from the CEO
4	Survey methodology
6	Top ten findings
8	Insights
28	About us
29	Country data

“Our approach to see and understand the Arab world’s unique dynamics through the eyes of its youth has also made the survey’s results relevant - and often the authoritative referral source - for policy makers and businesses.”





Letter from the Chief Executive Officer

Now in its seventh year, the ASDA'A Burson-Marsteller Arab Youth Survey serves as a barometer not only of the ever-evolving aspirations of Arab youth, the region's largest demographic of over 200 million, but also of the overarching social, political and economic trends that define the Arab world.

Our approach to see and understand the Arab world's unique dynamics through the eyes of its youth has also made the survey's results relevant - and often the authoritative referral source - for policy makers and businesses.

In 2010, a year ahead of the epochal events of the Arab Spring, the ASDA'A Burson-Marsteller Arab Youth Survey identified the simmering discontent among Arab youth, who were calling for a change in social order. Their single most important priority then was living in a democratic society. Ninety-two percent of the Arab youth polled in 2011 said "living in democracy" was their most important desire.

Now, just four years after the sweeping changes that some countries in the Arab world witnessed, during which many young people protested, fought and died, Arab youth are uncertain about whether democracy will ever work in the Middle East. In 2015, only 15 per cent of Arab youth cite lack of democracy as the biggest obstacle facing the region, a steep drop from the past three years. This changing perception about democracy is our top finding of the ASDA'A Burson-Marsteller Arab Youth Survey 2015.

Even as their confidence in the Arab Spring to bring positive change declines, Arab youth are extremely concerned about the rising influence of ISIS (the self-proclaimed Islamic State of Iraq and Levant, otherwise known as Daesh), which they feel is the biggest obstacle facing the region's growth. More importantly, less than half of Arab youth are confident their national government can deal with it.

This finding is of great significance to the region, which today witnesses a complicated theatre of war in which allies and foes defy logical explanation. The damage to the social fabric has been significant, especially in Syria, Libya, Iraq, and Yemen.

In Syria alone, over 10 million people have been rendered homeless, and over 215,000 people, including more than 11,000 children, have been killed during the last four years. What started as protests for jobs, homes and dignity, predominantly led by youth, has served to metamorphose into a proxy war waged by two of the region's powers, Saudi Arabia and Iran, especially since the US has taken a more cautionary approach in the Middle East. For Arab youth, however, little has changed. Their concerns remain largely the same, with unemployment weighing heavily on their minds.

Yet there are bright spots. As the survey finds, despite prevailing uncertainties around them, Arab youth are cautiously optimistic about the future. The social complexities have brought them closer to their roots and identity. They are proud of their heritage and are concerned about the declining use of the Arabic language. Youth across the region also see in the UAE a country they would like to live in and a model for their nation to emulate, a trend highlighted in the past four editions of the survey.

Reflecting the changing political scene, Arab youth see Saudi Arabia as their top ally in the region, followed by the United States and the UAE.

As the leading Public Relations consultancy in the region, we understand the value of such evidence-based insights. In a region where research is often limited, findings of our survey provide public and private sector organisations with data and analysis to arrive at informed decision-making and public policy.

We hope that the findings of the survey, which we share in the public domain as part of our social responsibility, will further add to the constructive dialogue about the hopes and aspirations of Arab youth.

Sunil John
ASDA'A Burson-Marsteller

Survey methodology

The 7th Annual ASDA'A Burson-Marsteller Arab Youth Survey 2015 was conducted by international polling firm PSB to explore attitudes among Arab youth in 16 countries in the Middle East and North Africa. PSB conducted 3,500 face-to-face interviews from January 20th to February 12th, 2015 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 their decision-making and policy formation.

The survey is the most comprehensive of its kind covering the six Gulf Cooperation Council states (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE), Algeria, Egypt, Iraq, Jordan, Lebanon, Libya, Morocco, Palestine, Tunisia and Yemen. The survey did not include Syria due to the civil unrest in the country.

Participants were interviewed in-depth about subjects ranging from the political to the personal. Topics explored included the concerns and aspirations of Arab youth, their views on the economy and the impact of the Arab Spring, their media consumption habits, and attitudes towards traditional values and the people who influence them.

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%.

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 Palestine with 150.

The geographic location of respondents was also taken into account by PSB when developing the fieldwork methodology – with, for example, 40% of UAE respondents in Abu Dhabi, 40% in Dubai and 20% in Sharjah. Saudi respondents were drawn from three of the country's regions; Riyadh, Jeddah and Dammam; Palestine's youth 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.

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

**GENDER SPLIT 50:50
MALE/FEMALE**

**3,500 FACE TO FACE
INTERVIEWS**

**ARAB YOUTH AGED
18-24 YEARS OLD**



Original countries 2008-10

UAE N=300	Oman N=200	Qatar N=200	Bahrain N=200	KSA N=300	Kuwait N=200	Egypt N=300	Jordan N=200	Lebanon N=200
Abu Dhabi 40%	Muscat 50%	Doha 55%	Manama 100%	Riyadh 40%	Kuwait City 20%	Cairo 50%	Amman 50%	Beirut 60%
Dubai 40%	Batinah 50%	Al Rayyan 45%		Jeddah 40%	Al Hawalli 30%	Alexandria 25%	Irbid 25%	Saida 20%
Sharjah 20%				Dammam 20%	Al Ahmadi 20%	Mansoura 25%	Zarqa 25%	Tripoli 20%
					Farwaniya 30%			

New in 2011

New in 2012

New in 2013

New in 2014

Iraq N=250	Tunisia N=200	Libya N=200	Algeria N=200	Morocco N=200	Yemen N=200	Palestine N=150
Baghdad 50%	Tunis 50%	Tripoli 50%	Algiers 50%	Casablanca 25%	Sanaa 50%	West Bank 50%
Irbil 25%	Sfax 25%	Benghazi 25%	Oran 25%	Fes 25%	Al Hudaydah 25%	Gaza 50%
Basrah 25%	Soussa 25%	Misrata 25%	Constantine 25%	Rabat 25%	Ta'izz 25%	
				Marrakech 25%		

16 ARAB COUNTRIES:

GCC: Saudi Arabia,
UAE, Qatar, Kuwait,
Oman, Bahrain

NORTH AFRICA: Egypt, Algeria,
Morocco, Tunisia, Libya

LEVANT & OTHER:
Iraq, Lebanon, Jordan,
Palestine, Yemen

Top 10 Findings

What do 200 million Arab youth have to say about their future?

1

With the legacy of the Arab Spring waning, Arab youth are uncertain whether democracy could ever work in the Middle East.

Confidence that the Arab Spring would bring positive change across the region is declining. In 2015, just 38 per cent agree that the Arab world is better off following the Arab Spring, compared to 72 per cent in 2012. As a result, Arab youth are uncertain about whether democracy could ever work in the Middle East with 39 per cent agreeing with the statement “democracy will never work in the region,” 36 per cent think it will work while the remaining 25 per cent are unsure.

3

As unemployment remains a major concern in the region, many young Arabs are keen to start their own business.

When asked to comment on how concerned they are about unemployment, the majority (81 per cent) say they are “concerned”. Nearly two in five (39 per cent) young Arabs are looking to start a business within the next five years.

2

The rise of ISIS is seen as the biggest obstacle facing the region and fewer than half of Arab youth are confident their national government can deal with it.

The rise of ISIS is a major worry for Arab youth with nearly three in four (73 per cent) “concerned” about the extremist group’s growing influence and almost two in five (37 per cent) citing it as the biggest obstacle facing the region. At the same time, fewer than half (47 per cent) are confident their national government can deal with this new threat.

4

Arab youth remain cautiously optimistic about the future despite the number of issues facing the region.

When thinking about the last five years, three in five (57 per cent) believe their country is heading in the right direction. Eighty-one per cent of Gulf youth believe things in their country are heading in the “right direction” compared to 57 per cent in North Africa and only 29 per cent in Levant.

5

While youth view the Arabic language as central to their identity, many believe it is losing its value and converse more in English.

Three in four (73 per cent) of Arab youth agree that the Arabic language is central to their identity but almost half of those polled (47 per cent) say it is losing its value. Sixty-three per cent agree that “knowing English can advance one’s career more than knowing Arabic.”

6

The UAE remains the country that most Arab youth would like to live in and is seen as a model for their country to emulate for the fourth year running.

When asked to name a country where they would like to live, Arab youth cite the UAE as their top choice for the fourth year running ahead of 20 other countries, including the United States, Germany and Canada. Likewise, when asked to think about which country they would like to emulate, almost a quarter (22 per cent) consider the UAE as a model nation, followed by the United States (15 per cent), Germany (11 per cent), Canada (8 per cent) and France (8 per cent).

7

Saudi Arabia is seen as the top ally in the region, followed by the United States and the United Arab Emirates.

When asked to think about their country’s biggest ally, Arab youth cite Saudi Arabia for the fourth year running and continue to view the UAE and United States as their biggest supporters in the region. One in three (30 per cent) consider the Kingdom their biggest ally, while 23 per cent cite the United States and 22 per cent the UAE.

8

The majority of Arab youth, particularly in the OPEC countries, are concerned about the falling energy prices, but most also believe the drop is temporary.

With few young Arabs believing the drop is permanent, youth are split on whether or not oil producing countries should lower production.

9

A brand’s country of origin matters to many young Arabs and four in five do not rule out the possibility of boycotting a brand for political reasons.

Almost half (44 per cent) say a brand’s country of origin matters to them and one in five (21 per cent) say they would boycott a brand for political reasons.

10

While digital plays an increasingly central role in the daily lives of Arab youth, television is still king.

While television remains the most popular source of news (60 per cent), 40 per cent of young Arabs get their news from online sources and 25 per cent from social media, significantly more than newspapers and radio.

1

With the legacy of the Arab Spring waning, Arab youth are uncertain whether democracy could ever work in the Middle East.

Confidence among Arab youth that the Arab Spring would bring positive change across the region is declining. In 2015, just 38 per cent agree that the Arab world is better off following the Arab Spring, compared to 54 per cent in 2014, 70 per cent in 2013, and 72 per cent in 2012. Similarly, fewer than half (41 per cent) agree they will be better off in five years following the uprisings, down from 58 per cent in 2014, 74 per cent in 2013, and 71 per cent in 2012.

The continued regional turmoil appears to weigh heavily on Arab youth outside the GCC region. When asked to think about the Arab world following the uprisings, 35 per cent in North Africa and 25 per cent in the Levant think it is better off, while looking ahead at the next five years, just 39 per cent in North Africa and 26 per cent in the Levant feel they will be better off.

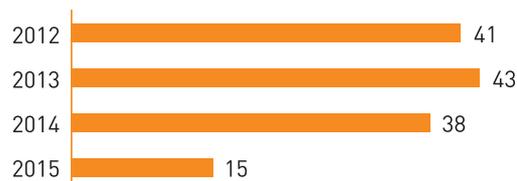
As a result, Arab youth are uncertain about democracy ever working in the Middle East. When asked whether they agree or disagree with the statement “democracy will never work in the region”, 39 per cent agree it will never work, 36 per cent think it could work while the remaining 25 per cent are unsure.

Views on democracy vary significantly from country to country. Youth in Yemen are most skeptical about it (61 per cent agree that

democracy will never work), followed by Qatar (60 per cent), Saudi Arabia (59 per cent), Oman (52 per cent) and Tunisia (46 per cent). The five countries most optimistic about democracy are Kuwait (58 per cent disagree that democracy could never work), Iraq (48 per cent), Libya (42 per cent), UAE (44 per cent) and Palestine (36 per cent).

The conflicting views on democracy in the Middle East are also reflected by the fact that when asked to name the biggest obstacles facing the region, just 15 per cent cite “lack of democracy”, down from 38 per cent in 2014, 43 per cent in 2013 and 41 per cent in 2012. In 2011, “living in a democracy” was the most important desire for 92 per cent of Arab youth polled.

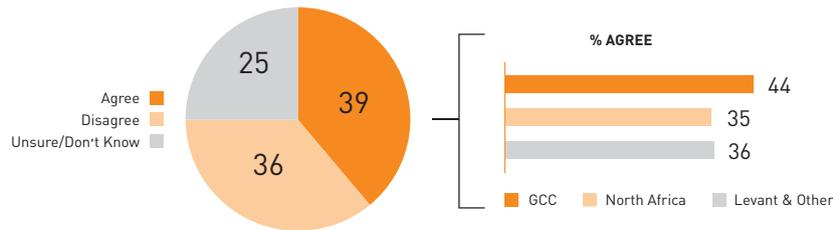
WHAT DO YOU BELIEVE IS THE BIGGEST OBSTACLE FACING THE MIDDLE EAST? SHOWING % CHOOSING “LACK OF DEMOCRACY” AS THE BIGGEST OBSTACLE





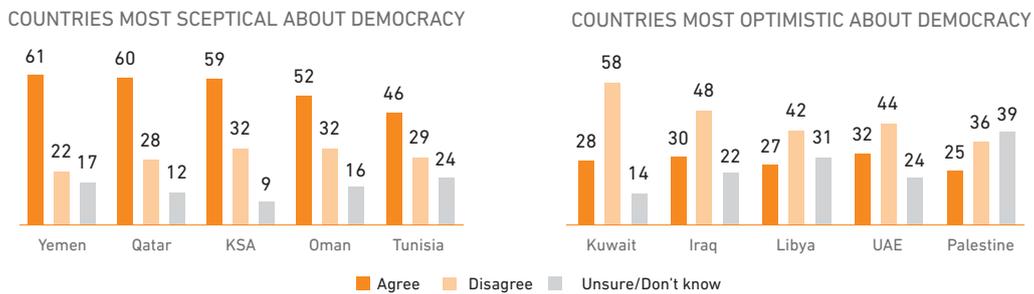
HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?

“DEMOCRACY WILL NEVER WORK IN THE MIDDLE EAST”



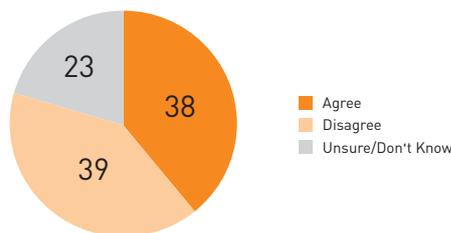
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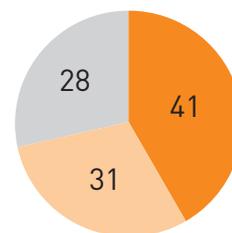


HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?

“FOLLOWING THE ARAB SPRING, I FEEL THE ARAB WORLD IS BETTER OFF”



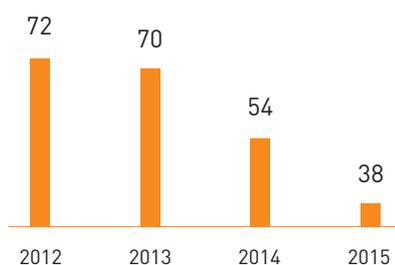
“FOLLOWING THE ARAB SPRING, I FEEL I WILL BE BETTER OFF IN FIVE YEARS”



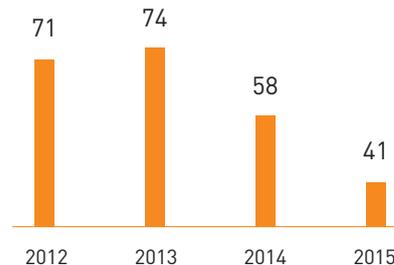
HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?

“FOLLOWING THE ARAB SPRING...” SHOWING % AGREE

“FOLLOWING THE ARAB SPRING, I FEEL THE ARAB WORLD IS BETTER OFF”



“FOLLOWING THE ARAB SPRING, I FEEL I WILL BE BETTER OFF IN FIVE YEARS”



2

The rise of ISIS is seen as the biggest obstacle facing the region and fewer than half of Arab youth are confident their national government can deal with it.

The rise of ISIS - also known as Daesh, the self proclaimed Islamic State of Iraq and Levant - is a major concern for Arab youth with nearly three in four (73 per cent) concerned with the extremist group's growing influence and almost two in five (37 per cent) citing it as the biggest obstacle facing the region. At the same time, fewer than half (47 per cent) are confident their national government can deal with this new threat. There are significant differences across the region in terms of confidence in their government's ability to deal with ISIS. While three in five (60 per cent) in the GCC and over half (53 per cent) are confident in North Africa, just 25 per cent of youth in the Levant say they are confident.

Arab youth are concerned about their government's ability to deal with the rise of the group, particularly in those countries whose borders neighbour ISIS territory. Youth are most concerned in Lebanon, where 77 per cent say they are "not confident" in their government's ability to tackle its growing reach, followed by Libya (63 per cent), Bahrain (59 per cent), Iraq (56 per cent) and Jordan (51 per cent).

In contrast, youth in most of the GCC appear to be more confident in their government's ability to deal with the group. Four of the top five countries in terms of confidence are in the Gulf.

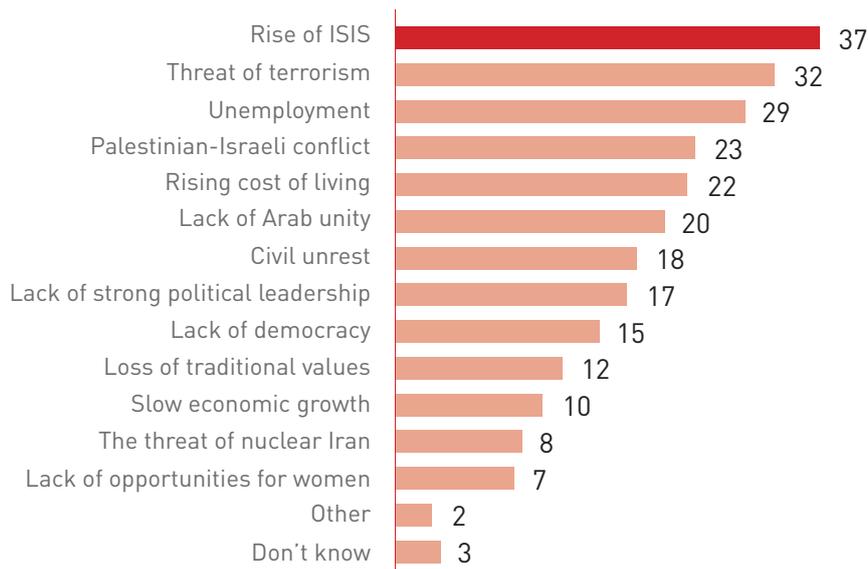
Those polled in Algeria have the most confidence in their government (83 per cent), followed by the UAE (71 per cent), Kuwait and Saudi Arabia (77 per cent each) and Qatar (70 per cent).

The concerns follow the rapid spread and apparent influence of ISIS around the world through its use of social media. The group has struck in the heart of the Arab world, capturing territory across Syria and Iraq, attempting to erase borders and demanding allegiance to its extreme interpretation of Islam. The group has gained notoriety across the world for its violent attacks on civilians, foreign aid workers and journalists and its persecution of people across sects and ethnicities that do not adhere to its ultra-hardline doctrine.

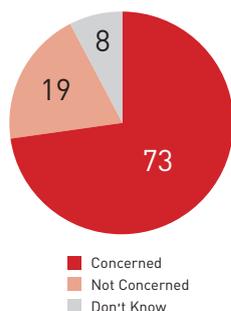
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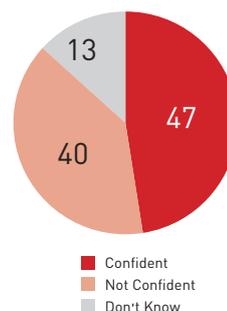
WHAT DO YOU BELIEVE IS THE BIGGEST OBSTACLE FACING THE MIDDLE EAST?



HOW CONCERNED WOULD YOU SAY YOU ARE ABOUT THE RISE OF ISIS?

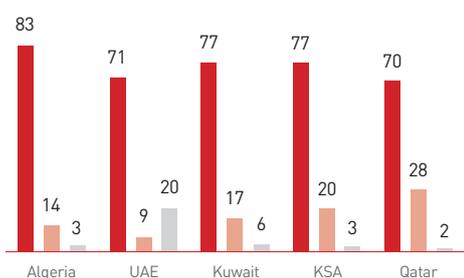


HOW CONFIDENT ARE YOU IN YOUR NATIONAL GOVERNMENT'S ABILITY TO DEAL WITH THE RISE OF ISIS?

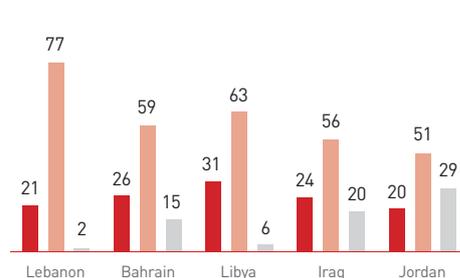


HOW CONFIDENT ARE YOU IN YOUR NATIONAL GOVERNMENT'S ABILITY TO DEAL WITH THE RISE OF ISIS?

COUNTRIES MOST CONFIDENT IN THEIR GOVERNMENT'S ABILITY TO DEAL WITH ISIS.



COUNTRIES LEAST CONFIDENT IN THEIR GOVERNMENT'S ABILITY TO DEAL WITH ISIS.



■ Confident ■ Not Confident ■ Don't Know

3

As unemployment remains a major concern in the region, many young Arabs are keen to start their own business.

Concern about unemployment continues to weigh heavily on Arab youth, with almost one in three (29 per cent) citing it as the biggest obstacle facing the region. When asked to comment on how concerned they are about unemployment, the majority (81 per cent) say they are “concerned”. The issue is particularly worrying for youth in non-GCC countries where 84 per cent are concerned compared to 73 per cent in the six GCC states.

Only one in three (33 per cent) of youth outside the GCC are confident in their government’s ability to tackle the issue of unemployment, a significant difference compared to the GCC at 68 per cent.

High unemployment rates continue to be a pressing concern for the region as its youth population grows. Overall unemployment rates differ significantly across the region from as low as 11 per cent in Kuwait to over 30 per cent in Morocco, according to United Nations data. Meanwhile the Middle East and North Africa needs to create 80-100 million jobs by 2020 to maintain its current unemployment rates, according to the World Bank.

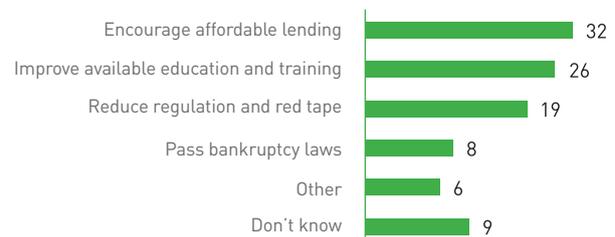
Just over a quarter (27 per cent) of non-GCC Arab youth say there are good job opportunities in the area they live, compared to 65 per cent in the GCC.

While decades of oil income have helped GCC states provide secure public sector jobs for the majority of their citizens, many non-GCC countries continue to struggle.

Regional governments, concerned about unemployment rates, growing populations and a desire to diversify their economies, are encouraging more citizens to enter the private sector or establish their own businesses. The survey sees positive trends in this area. Nearly two in five (39 per cent) young Arabs are looking to start a business within the next five years, with technology and retail being the most popular sectors.

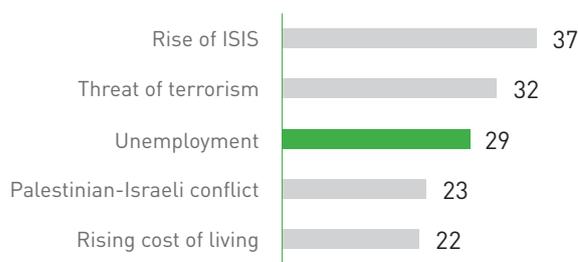
When asked to suggest what national governments should do to further encourage entrepreneurship, one third (32 per cent) say they should encourage affordable lending. They cite improving available training and education (26 per cent) as the second most pressing measure followed by reducing regulation and red tape (19 per cent).

WHAT SHOULD YOUR GOVERNMENT DO TO PROMOTE ENTREPRENEURSHIP?

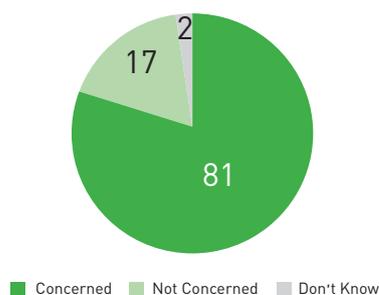




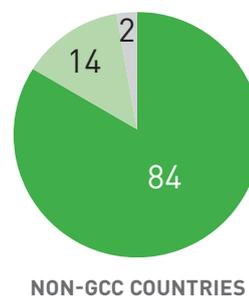
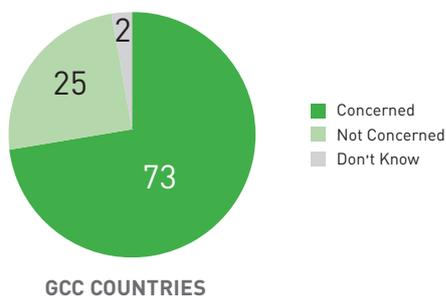
WHAT DO YOU BELIEVE IS THE BIGGEST OBSTACLE FACING THE MIDDLE EAST?



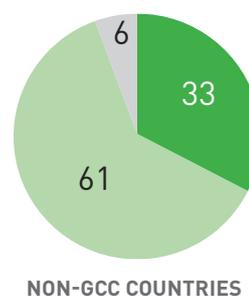
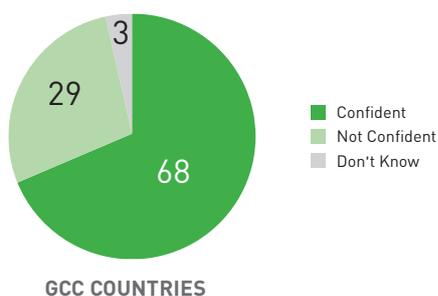
HOW CONCERNED WOULD YOU SAY YOU ARE ABOUT UNEMPLOYMENT?



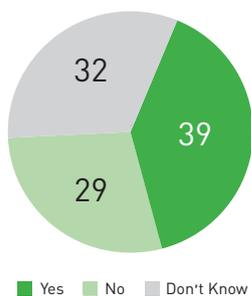
HOW CONCERNED WOULD YOU SAY YOU ARE ABOUT UNEMPLOYMENT?



HOW CONFIDENT ARE YOU IN YOUR GOVERNMENT'S ABILITY TO DEAL WITH UNEMPLOYMENT?



DO YOU INTEND TO START YOUR OWN BUSINESS WITHIN THE NEXT FIVE YEARS?



IF INTENDS TO START: IN WHICH INDUSTRY WOULD YOU LIKE TO SET YOUR BUSINESS UP IN?



4

Arab youth remain cautiously optimistic about the future, despite the number of issues facing the region.

Arab youth are keenly aware of the present issues facing the region but remain cautiously optimistic about the long term future, with youth in the GCC particularly positive. When thinking about the last five years, three in five (57 per cent) believe their country is heading in the right direction while 35 per cent say things have gone in the wrong direction.

Youth in the GCC are significantly more optimistic than their peers in other parts of the Arab world. Eighty-one per cent of Gulf youth believe things in their country are going in the right direction compared to 57 per cent in North Africa and only 29 per cent in Levant.

The divide in opinion is less pronounced when Arab youth are asked to think about the future. Thinking about the long term, two in three (67 per cent) believe their best days are still ahead while just 26 per cent think their best days are behind them.

Almost three in four youth in both the GCC and North Africa believe "Our best days are ahead of us". Even in the Levant, which continues to grapple with political and economic instability, 57 per cent believe their best days are ahead compared to 34 per cent who say their best days are behind them.

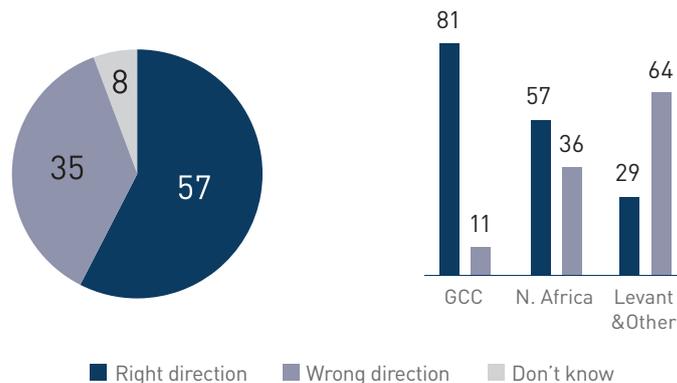
When asked to choose from a list of adjectives to describe how they feel about the future of the country, 63 per cent of youth choose a positive adjective, 25 per cent choose a negative adjective while 12 per cent say they are "uncertain."

The legacy of the Arab Spring coupled with vast differing economic factors, job prospects and government support shows a clear divide between how Arab youth feel about the future in the oil rich GCC states and those in North Africa and the Levant. The International Monetary Fund recently revised its outlook for economic growth in the Middle East and North Africa to 3.3 per cent in 2015, 0.6 per cent lower than previous estimates, but said the GCC would not be hit as hard as other regional oil exporters.

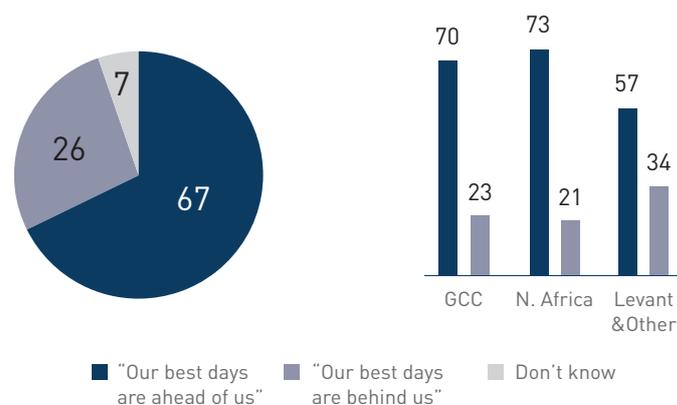
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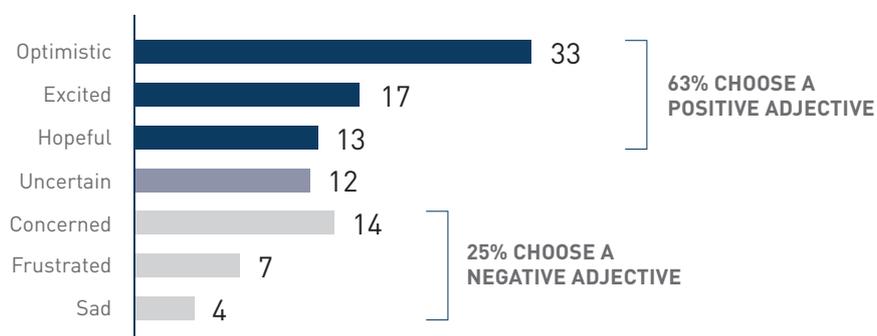
THINKING ABOUT THE LAST FIVE YEARS, IN GENERAL, DO YOU THINK THINGS IN YOUR COUNTRY OF RESIDENCE ARE HEADING IN THE RIGHT DIRECTION OR ARE THEY GOING IN THE WRONG DIRECTION?



WHICH OF THE FOLLOWING DO YOU AGREE WITH?



WHICH, IF ANY, BEST DESCRIBES HOW YOU FEEL ABOUT THE FUTURE OF YOUR COUNTRY?



5

While youth view the Arabic language as central to their national identity, many believe it is losing its value and converse more in English.

Three in four (73 per cent) agree that the Arabic language is central to their identity with youth in the GCC feeling particularly strong about the issue; 81 per cent of them agree with the statement “Arabic is central to my national identity” compared to 68 per cent in non-GCC countries.

On the other hand, almost half of those polled (47 per cent) say that the Arabic language is losing its value while one in three (34 per cent) disagree.

Youth in the GCC believe the Arabic language is losing its significance more than those in the rest of the region with 54 per cent agreeing with the statement “Arabic is losing its value” in the GCC compared to 43 per cent in non-GCC countries.

Furthermore, two in three (63 per cent) agree that knowing English can advance their career more than knowing Arabic. Again, GCC countries (74 per cent) agree more than non-GCC (56 per cent) about the greater value of English in the professional world.

Significantly, 36 per cent of young Arabs use English more than Arabic on a daily basis. The phenomenon is particularly prevalent in the GCC where 56 per cent say they use English more than Arabic, versus 24 per cent in non-GCC countries.

As a result, two in three (63 per cent) are concerned about the declining use of Arabic with a fairly even split between GCC (61 per cent) and non-GCC (65 per cent).

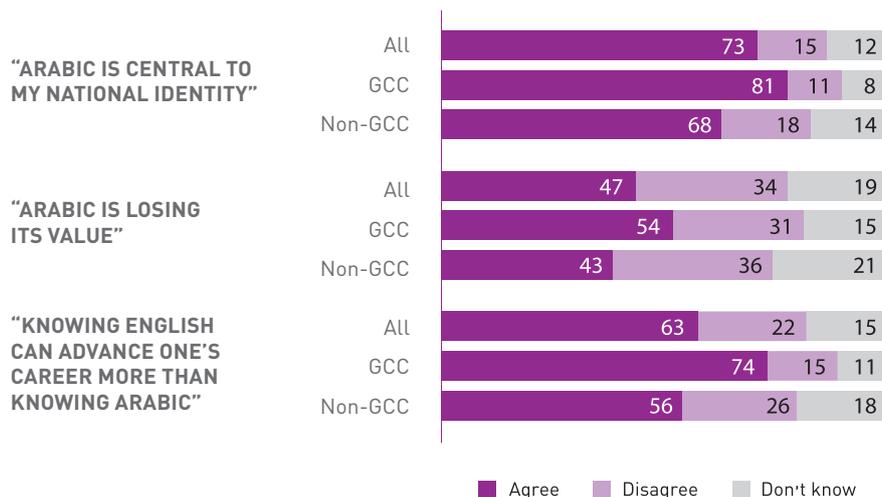
Youth in the GCC are more confident about their national government’s ability to deal with the issue with 69 per cent expressing confidence their government can preserve the Arabic language.

Youth recognise the importance of the Arabic language as part of their identity but as more jobs demand English skills, school curriculums place greater importance on foreign languages and influence of western pop culture rises, many believe knowing English will further their career.

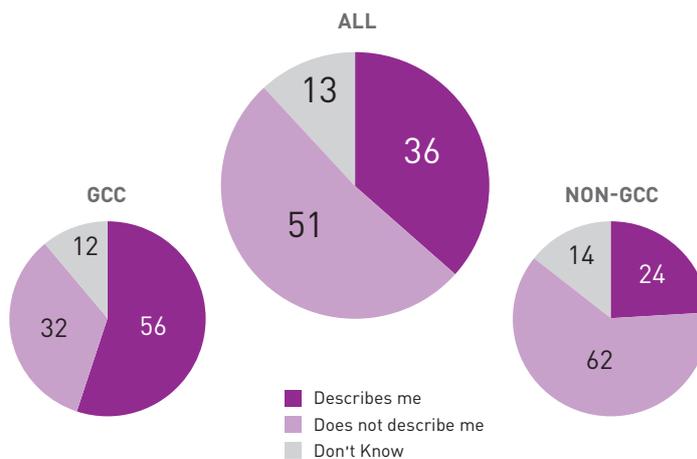
Youth in the GCC believe the Arabic language is losing its significance more than those in the rest of the region with 54 per cent agreeing with the statement “Arabic is losing its value” in the GCC compared to 43 per cent in non-GCC countries.



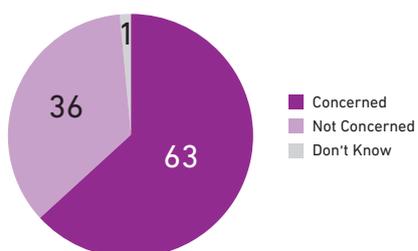
HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT?



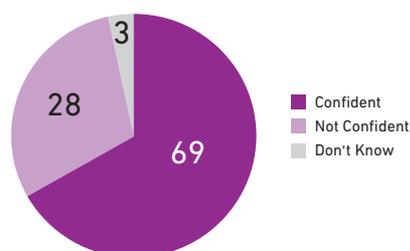
HOW WELL DOES THIS STATEMENT DESCRIBE YOU? "ON A DAILY BASIS, I USE ENGLISH MORE THAN ARABIC"



HOW CONCERNED WOULD YOU SAY YOU ARE ABOUT THE DECLINING USE OF ARABIC?



HOW CONFIDENT ARE YOU IN YOUR NATIONAL GOVERNMENT'S ABILITY TO DEAL WITH PRESERVING THE ARABIC LANGUAGE?



6

The UAE remains the country that most Arab youth would like to live in and is seen as a model for their country to emulate for the fourth year running.

When asked to name a country anywhere in the world where they would like to live, Arab youth cite the UAE as their top choice for the fourth year running ahead of 20 other countries, including the United States, Germany and Canada.

Across the 16 countries polled, one in five (20 per cent) say they would like to live in the UAE. For the second year running, the United States is the second most popular (13 per cent) followed by Canada and Germany, both at 10 per cent.

Likewise, when asked to think about which country they would most like their home country to emulate, almost a quarter (22 per cent) consider the UAE as a model nation, followed by the United States (15 per cent) and Germany (11 per cent). Canada and France also feature in the top five at eight per cent, respectively, making the UAE the only Arab country in the top five choices identified by Arab youth.

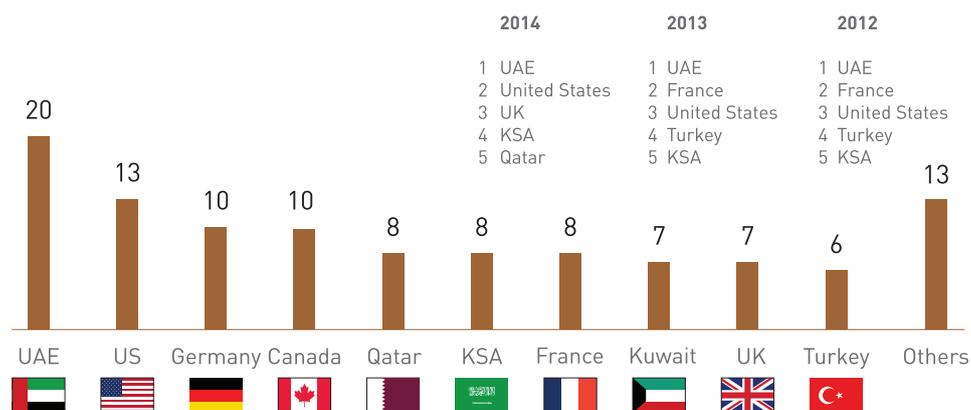
The popularity of the UAE is a reflection of the country's strong economic outlook and status as a safe haven. The economy of the Gulf state is expected to grow 3.5 per cent in 2015 and 2016 in spite of falling oil prices, according to the International Monetary Fund. The country continues to invest in key infrastructure projects and social spending packages.

The UAE is known as a country where young Arabs are encouraged to reach their full potential across a broad spectrum of industries from technology start-ups to the arts and finance, in a culture they are familiar with. Last year, the UAE announced 2015 as the Year of Innovation in a plan to foster innovation across the Gulf state.

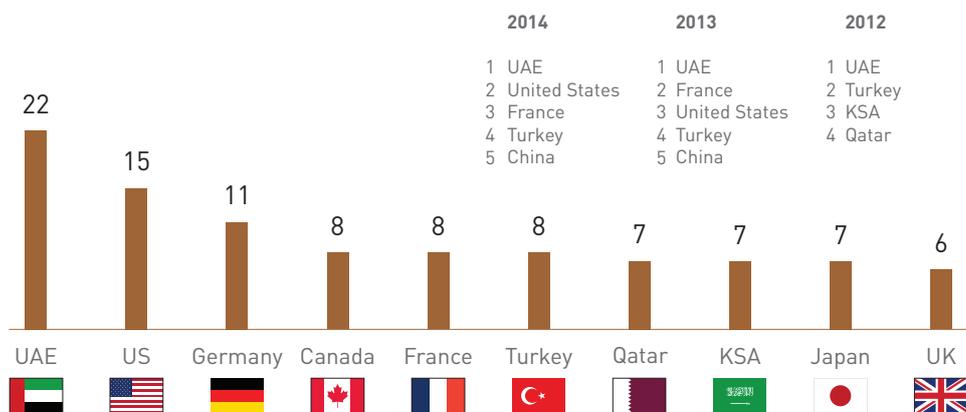
The popularity of the UAE is a reflection of the country's strong economic outlook and status as a safe haven. The economy of the Gulf state is expected to grow 3.5% in 2015 and 2016 in spite of falling oil prices, according to the IMF.



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



WHICH COUNTRY IN THE WORLD, IF ANY, WOULD YOU MOST LIKE YOUR COUNTRY TO BE LIKE?



7

Saudi Arabia is seen as the top ally in the region, followed by the United States and the United Arab Emirates.

When asked to think about their country's biggest ally, Arab youth cite Saudi Arabia for the fourth year running and continue to view the UAE and United States as their biggest supporters in the region. One in three (30 per cent) consider the Kingdom their biggest ally, while 23 per cent cite the United States and 22 per cent the UAE. Qatar ranks fourth (16 per cent) followed by France (11 per cent).

Saudi Arabia, which has started to assert itself more in the region in response to US foreign policy, is viewed as a top ally in 12 Arab countries (all but Tunisia, Iraq, and Libya) while the influence of US and UAE is more limited to the GCC countries. Outside the GCC, only Iraq, Morocco, and Jordan view US as one of their top three allies while outside the GCC, Iraq and Egypt consider the UAE among their top allies.

Saudi Arabia has been growing increasingly assertive following Washington's drive to conclude the framework agreement with Iran on the nuclear issue and its recent cautionary approach in the Middle East. President Obama's decision in 2013 not to bomb Syria after the use of chemical weapons by the Bashar Al Assad regime, has concerned Riyadh.

The conservative Gulf state is typically shy about taking part in military action but its recent air strikes in Yemen along with a ten-nation Arab coalition and growing military partnerships with regional allies are signs of a bid to play a bigger role in the wider Middle East.

Saudi Arabia has been for some time concerned about Iran's growing influence in Lebanon, Syria, Iraq, and Yemen.

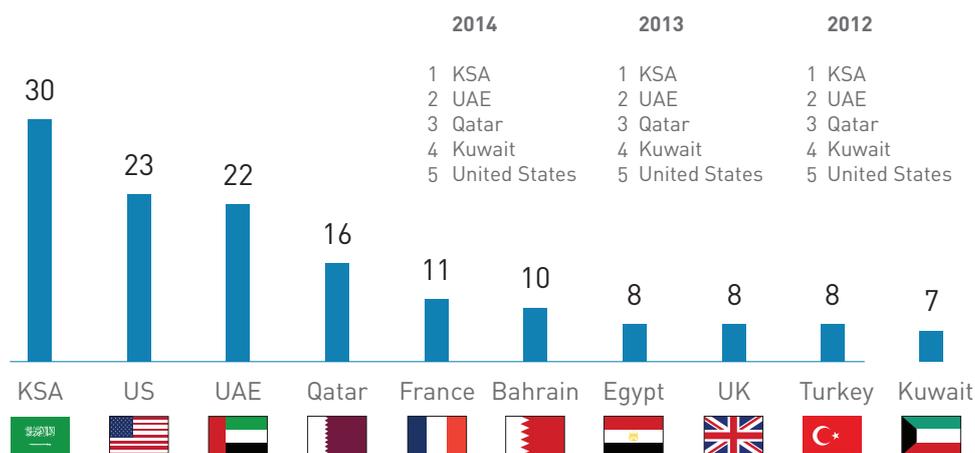
The UAE is also demonstrating its political weight in the region, offering joint support in the fight against ISIS, as well as recent military action in Yemen. Fighting Islamic extremists at home and abroad is the centrepiece of the official Emirati world view as described by His Highness Sheikh Mohammed bin Zayed Al Nahyan, Crown Prince of Abu Dhabi and Deputy Supreme Commander of the UAE Armed Forces.

The UAE's prominent role in providing political and economic support to the El-Sisi government in Egypt has further catapulted the country to be amongst the top political powers in the region.

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WHO WOULD YOU SAY IS YOUR COUNTRY'S BIGGEST ALLY?



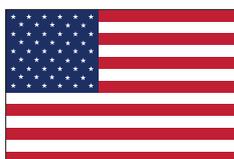
WHO WOULD YOU SAY IS YOUR COUNTRY'S BIGGEST ALLY?

SAUDI ARABIA SEEN AS ONE OF THE TOP THREE ALLIES BY:



- UAE
- Qatar
- Oman
- Bahrain
- Kuwait
- Egypt
- Algeria
- Morocco
- Jordan
- Lebanon
- Yemen
- Palestine

UNITED STATES SEEN AS ONE OF THE TOP THREE ALLIES BY:



- Saudi Arabia
- UAE
- Qatar
- Bahrain
- Iraq
- Morocco
- Jordan

UNITED ARAB EMIRATES SEEN AS ONE OF THE TOP THREE ALLIES BY:



- Saudi Arabia
- Qatar
- Bahrain
- Kuwait
- Oman
- Iraq
- Egypt

8

The majority of Arab youth, particularly in the OPEC countries, are concerned about the falling energy prices, but most also believe the drop is temporary.

More than half of Arab youth are “concerned” (52 per cent) about falling energy prices as the cost of oil continues to decline. Thirty seven per cent say they are not concerned, while 10 per cent “don’t know”.

Unsurprisingly the level of concern is higher in the Organisation of Petroleum Exporting Countries (OPEC). In Kuwait, 90 per cent of youth say they are concerned, followed by Libya (84 per cent), Algeria (75 per cent) and Iraq (64 per cent).

When asked to think about the negative impact falling energy prices will have on them, three in five (64 per cent) expect it will have a negative effect on the economy, on them personally (64 per cent), and the entire Arab world (60 per cent) as well as their government’s social spending (60 per cent).

Just over half (53 per cent) believe the current drop is temporary while 26 per cent believe the new price is here to stay. In spite of the decline, the majority (72 per cent) of youth believe energy should be subsidised by their government.

Youth are divided on whether oil-producing countries should decrease production in light of the continued decline.

Out of the six OPEC members polled, youth in Kuwait, Iraq, Libya, and Qatar believe there should be a decrease in production while youth in the UAE are split and those in Saudi Arabia believe it should remain at its current level.

Crude oil has declined around 50 per cent since last June amid a global oversupply, particularly shale oil in the US, and weakening demand growth. The price has fallen since last November when OPEC said it would maintain its existing production quota. Although prices have recovered since January this year, they have fallen again in recent weeks following concerns of an oversupply in the US.

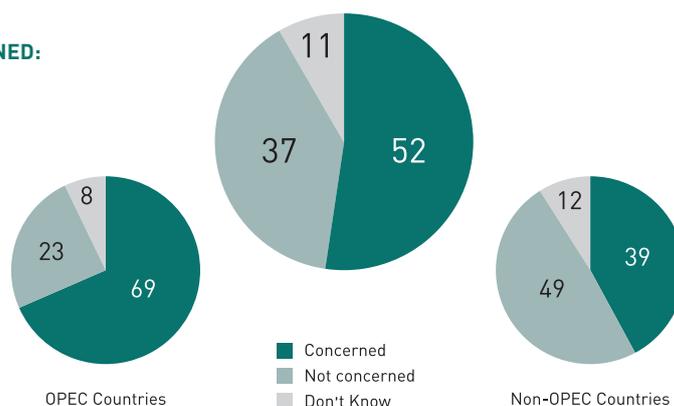
With the nuclear agreement between the US and Iran coming to a possible conclusion by June 30th, a further enhanced oil supply from Iran is likely to put increased pressure on oil pricing later in the year.

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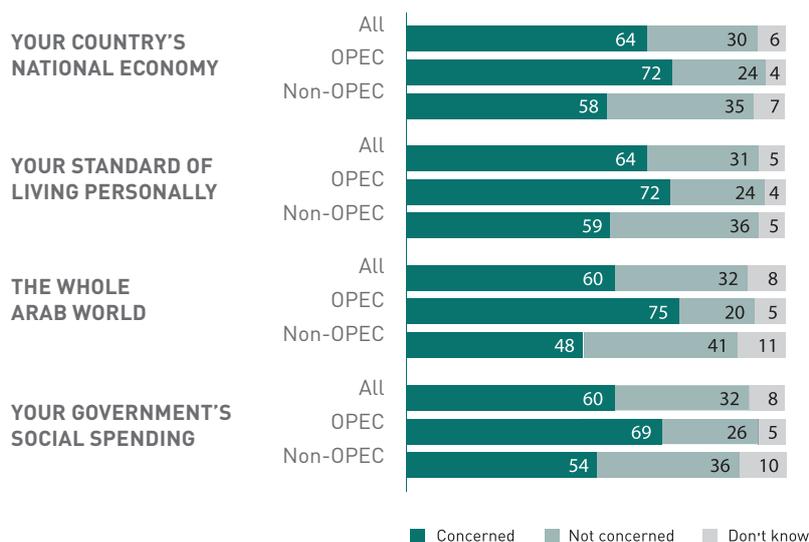


HOW CONCERNED ARE YOU ABOUT FALLING ENERGY PRICES?

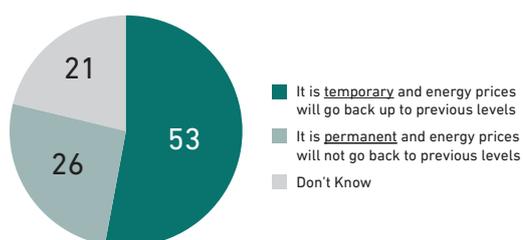
MOST CONCERNED:
 KUWAIT – 90%
 LIBYA – 84%
 ALGERIA – 75%
 IRAQ – 64%



HOW CONCERNED ARE YOU THAT FALLING ENERGY PRICES WILL HAVE A NEGATIVE IMPACT ON [...]?



WHICH OF THE FOLLOWING IS CLOSER TO YOUR VIEW ABOUT THE RECENT DROP IN ENERGY PRICES?



38% think oil producing countries should decrease oil production to bring back oil prices

39% think the current levels of oil production should be continued

9

A brand's country of origin matters to many young Arabs and four in five do not rule out the possibility of boycotting a brand for political reasons.

Arab youth consider a brand's country of origin before purchasing a product with those in the GCC more conscious than their peers in non-GCC countries. Almost half (44 per cent) say a brand's country of origin matters to them, compared to 52 per cent who say it does not.

Youth in the UAE are most conscious with 78 per cent saying it matters, followed by Oman (58 per cent), Qatar (56 per cent), Egypt (55 per cent) and Algeria (54 per cent).

When asked which country of origin is most appealing to them, Arab youth cite the United States, Germany and France as the most appealing at 16 per cent each.

Across the Arab world one in three (32 per cent) would boycott a brand for political reasons while just one in five (21 per cent) youth would never support the boycott of a brand for political reasons.

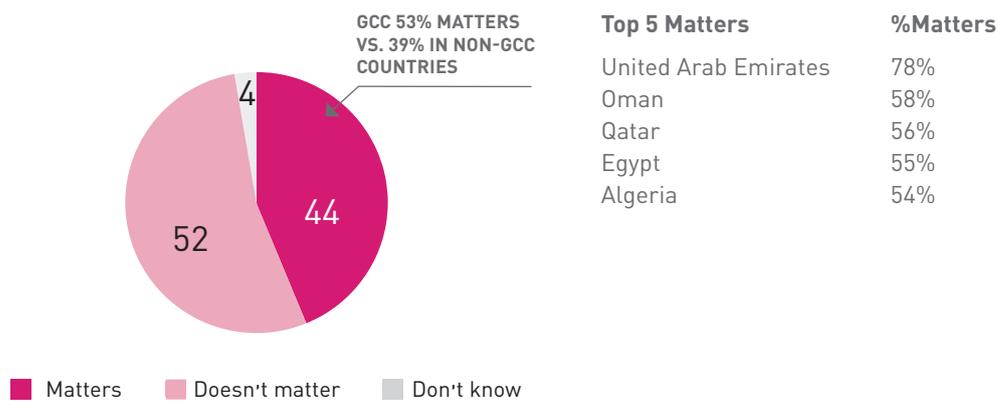
Nearly half (46 per cent) are unsure but do not rule out using their purchasing power as a political tool. Youth in GCC countries are more likely to boycott a brand than their peers in other non-GCC countries with 37 per cent claiming they would in the GCC compared to 29 per cent in the non-GCC countries.

Growing internet penetration together with the rise of social media has exposed Arab youth to more global issues, sensitising them even more to global brands and political issues. Boycotts, however, are not a recent phenomenon. During times of conflict, many Arabs have shunned specific products or brands for political reasons.

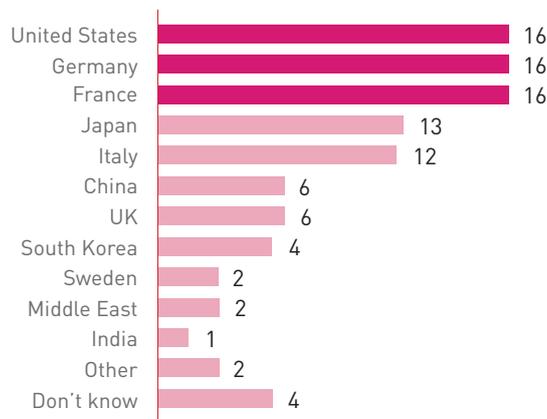
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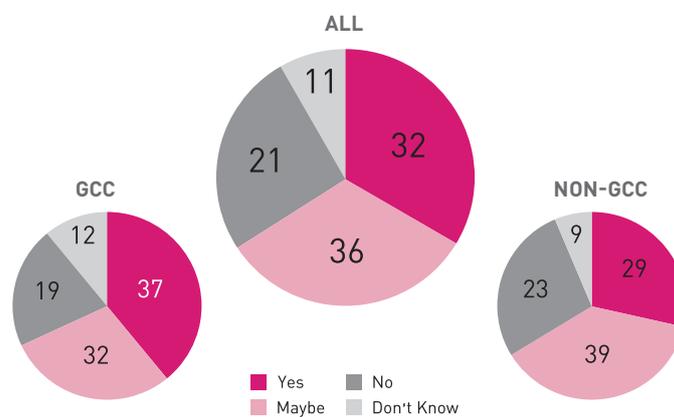
HOW MUCH DOES A BRAND'S COUNTRY OF ORIGIN MATTER TO YOU?



WHICH BRAND/COUNTRY OF ORIGIN IS MOST APPEALING TO YOU?



WOULD YOU EVER SUPPORT THE BOYCOTT OF A BRAND FOR POLITICAL REASONS?



10

While digital media plays an increasingly central role in the daily lives of Arab youth, television is still king.

With almost eight in ten (77 per cent) young Arabs saying they own a smartphone and almost five in six (82 per cent) being daily internet users, Arab youth are a truly digital generation.

The rise in smartphones and easy internet access is clearly having an impact on the way youth consume media. While television remains the most popular source of news (60 per cent), 40 per cent of young Arabs get their news from online sources and 25 per cent from social media, significantly more than newspapers and radio.

The influence and reach of social media continues to grow with 91 per cent saying they visit social media channels at least once a week.

Networks such as Facebook and Twitter are fast becoming major sources of information for youth with two fifths (41 per cent) saying they use Facebook to share interesting news articles with their family and friends.

Smartphones now make up the vast majority of all phones shipped in the GCC, according to the International Data Corporation. The GCC is one of the biggest users of social media per capita in the world with youth turning online for drama, comedy, sports and news.

The same trend is sweeping across the broader Arab world. In the MENA region, 280 million YouTube videos are viewed every day and two hours of content is uploaded every single minute, according to Discover Digital Arabia. Consumption of other social networks such as Facebook, Twitter, Instagram and LinkedIn is also high.

In February, LinkedIn launched its Arabic version amid growing demand from the region. Of the 347 million members on the LinkedIn networker, users from MENA account for over 14 million, up from five million in 2012, according to LinkedIn.

The GCC is one of the biggest users of social media per capita in the world with youth turning online for drama, comedy, sports and news.



82% daily internet users



77% own a smartphone



79% watch TV news channels at least once a week



75% read news online at least once a week



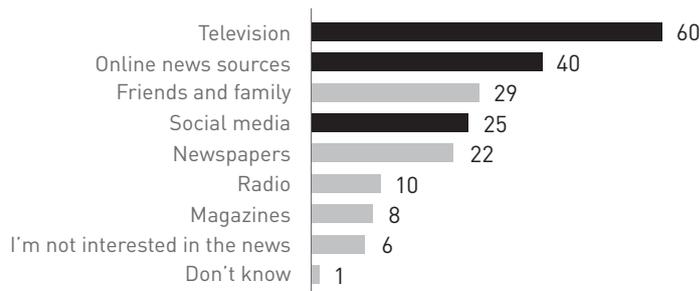
91% visit social media channels at least once a week; 53% do so daily



41% use Facebook to share interesting news articles they read



WHERE DO YOU GET YOUR NEWS FROM?



About Us



Established in 2000, ASDA'A Burson-Marsteller is the region's leading public relations consultancy, with 11 wholly-owned offices and 10 affiliates across the Middle East and North Africa. A WPP company within the global Burson-Marsteller network, ASDA'A Burson-Marsteller is a member of the MENACOM Group. The agency provides services to governments, multi-national businesses and regional corporate clients through its seven practices in the sectors of Technology, Finance, Healthcare, Energy & Environment as well as Consumer Marketing, Corporate Communications and Public Affairs. The firm's services include reputation management, digital communications, media relations, media monitoring & analysis, market research, design services and event management.

asdaabm.com



Burson-Marsteller, established in 1953, is a leading global public relations and communications firm. It provides clients with strategic thinking and programme execution across a full range of public relations, public affairs, reputation and crisis management, advertising and digital strategies. The firm's seamless worldwide network consists of 73 offices and 85 affiliate offices, together operating in 110 countries across six continents. Burson-Marsteller is a part of Young & Rubicam Group, a subsidiary of WPP, the world's leading communications services network.

bm.com



Penn Schoen Berland (PSB), a member of Young & Rubicam Group and the WPP Group, is a global research-based consultancy that specialises in messaging and communications strategy for blue-chip political, corporate and entertainment clients. PSB's operations include over 200 consultants and a sophisticated in-house market research infrastructure with the capability to conduct work in over 90 countries. The company operates offices in Washington, D.C., New York, London, Seattle, Los Angeles, Dubai, Singapore, Delhi, Madrid and Denver, which are supported by an in-house fielding capability and are fully equipped to provide the complete creative solutions PSB clients need.

psbresearch.com



MENACOM, part of WPP and Y&R Group, with headquarters in Dubai, is the Middle East and North Africa region's leading communications conglomerate. The group includes, in addition to ASDA'A Burson-Marsteller, advertising agencies Young & Rubicam, Intermarkets and Partnership; direct marketing specialists Wunderman; media specialist firm MEC; and interactive firm Tattoo. With over 900 employees in its network of 37 offices, MENACOM provides marketing communications services in 12 countries across the Middle East and North Africa.



COUNTRY DATA

Country	Population (million) ¹	GDP-PPP (USD billion) ²	Contribution of oil to GDP(%) ³	Youth unemployment(%) ⁴	Internet users (million) ⁵	Internet penetration rate(%) ⁶	Facebook users (million) ⁷	Facebook penetration of population(%) ⁸	Total social media penetration(%) ⁹
GCC									
Saudi Arabia	29.3	1,651.7	45	28.7	16.4	60.5	8.3	28.1	31
UAE	9.4	604.96	25	9.9	8.1	88	4.8	58	51
Qatar	2.3	323.2	50	1.5	1.8	85.3	1.21	60.9	56
Kuwait	3.4	283.9	50	19.6	2.1	75.5	1.47	48.3	49
Oman	3.9	163.6	50	20.5	2.1	66.4	0.85	27.9	27
Bahrain	1.3	61.6	11	27.9	1.2	90	0.53	38.9	42
North Africa									
Egypt	83.4	945.4	NA	38.9	43.1	49.6	19.5	22.4	23
Algeria	39.9	551.7	30	24	6.4	16.5	6.8	18.1	18
Morocco	33.5	254.4	NA	18.5	18.5	56	7	21.7	22
Tunisia	11.1	125.1	NA	31.2	4.8	43.8	4.7	42.1	42
Libya	6.3	103.3	80	51.2	1.03	16.5	1.75	3.7	30
Levant & Other									
Iraq	34.8	494.5	65	34.1	2.99	9.2	7	19.5	23
Lebanon	4.96	80.1	NA	20.6	2.9	70.5	2	45.9	48
Jordan	7.5	80.2	NA	33.7	2.9	44.2	3.1	47.9	48
Palestine	4.4	7	NA	NA	1.5	55.4	1.41	31.4	33
Yemen	24.96	106.03	25	29.8	5.2	20	1.5	5.6	6

¹<http://worldpopulationreview.com/countries/>

²<http://www.imf.org/external/pubs/ft/weo/2014/02/weodata/index.aspx>

³<http://www.forbes.com/>, <http://www.gulfbase.com/>, <http://www.undp.org/>

⁴<http://data.worldbank.org/indicator/SL.UEM.1524.ZS>

⁵<http://www.internetworldstats.com/>

⁶<http://www.internetworldstats.com/>

⁷<http://www.arabsocialmediareport.com/>

⁸<http://www.arabsocialmediareport.com/>

⁹<http://www.statista.com/statistics/309668/active-social-media-penetration-in-arab-countries/>

“With the legacy of the Arab Spring waning, Arab youth are uncertain whether democracy could ever work in the Middle East”

A White Paper on the Findings of the ASDA'A Burson-Marsteller Arab Youth Survey 2015

Published in 2015 by ASDA'A Burson-Marsteller

This White Paper can be obtained from the ASDA'A Burson-Marsteller Arab Youth Survey website: www.arabyouthsurvey.com

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