

ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2014

Algeria
Bahrain
Egypt
Iraq
Jordan
Kuwait
Lebanon
Libya

Morocco
Oman
Palestine
Qatar
Saudi Arabia
Tunisia
UAE
Yemen

“WE WANT
TO EMBRACE
MODERN VALUES.”

April 7, 2014
arabyouthsurvey.com
#arabyouthsurvey

ABOUT THE 2014 SURVEY

- 3,500 face-to-face interviews conducted by PSB
- Arab youth in the age group of 18-24 years
- Sample split 50:50 male/female
- 16 countries
 - GCC: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and UAE
 - Levant: Jordan, Iraq, Lebanon and Palestine
 - North Africa: Algeria, Egypt, Libya, Morocco and Tunisia
 - Other: Yemen

**THE RESEARCH WAS DESIGNED TO
SEEK OPINION FROM ARAB YOUTH ON
THE FOLLOWING SUBJECTS:**

GENERAL ATTITUDES

CURRENT EVENTS

ECONOMY AND PERSONAL FINANCE

EDUCATION AND CAREERS

VALUES AND BELIEFS

FOREIGN RELATIONS

MEDIA CONSUMPTION HABITS

METHODOLOGY



**THE STUDY WAS COMMISSIONED IN DECEMBER 2013.
THE INTERVIEWS TOOK PLACE FROM DECEMBER 2013
TO JANUARY 2014. SAMPLE DETAILS ARE GIVEN BELOW:**

Original 2008-10 countries

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 30th	Alexandria 25%	Irbid 25%	Saida 20%
Sharjah 20%				Dammam 20%	Al Ahmadi 20%	Mansoura 25%	Zarqa 25%	Tripoli 20%

New in 2011

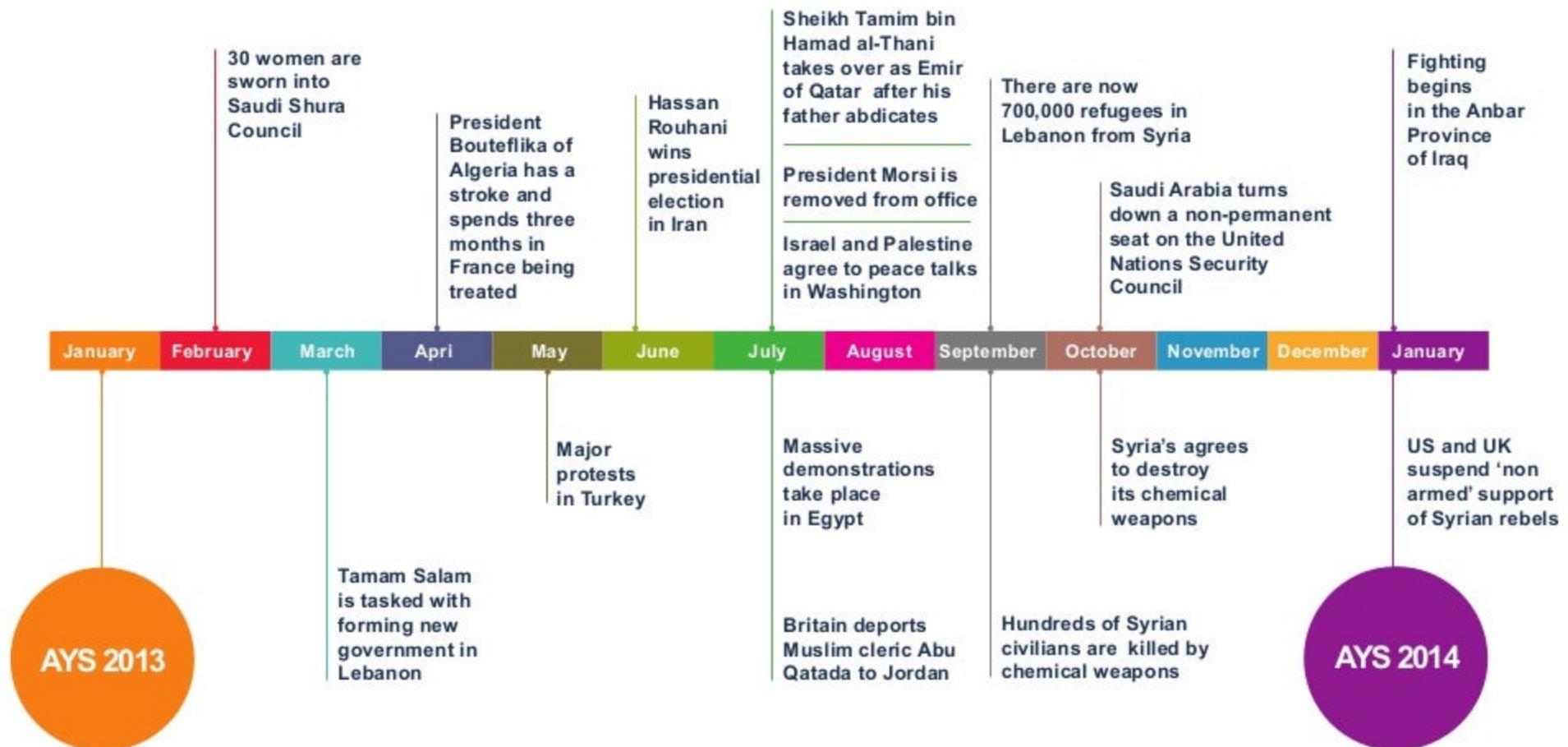
New in 2012

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%)	Sousse (25%)	Misrata (25%)	Constantine (25%)	Rabat (25%)	Ta'izz (25%)	Marrakech (25%)

TIMELINE (JANUARY 2013 - JANUARY 2014)





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ARAB YOUTH SURVEY 2014

TOP 10 FINDINGS



100



A GROWING NUMBER OF ARAB YOUTH ARE
EMBRACING MODERN VALUES, WHILE FAMILY,
FRIENDS AND RELIGION CONTINUE TO SHAPE
THEIR OPINIONS AND INFLUENCE THEIR LIVES

VALUES AND BELIEFS

Which of the following is closest to your view?

■ Traditional values mean a lot to me, and ought to be preserved for generations to come.

■ Traditional values are outdated and belong in the past. I am keen to embrace modern values and beliefs.

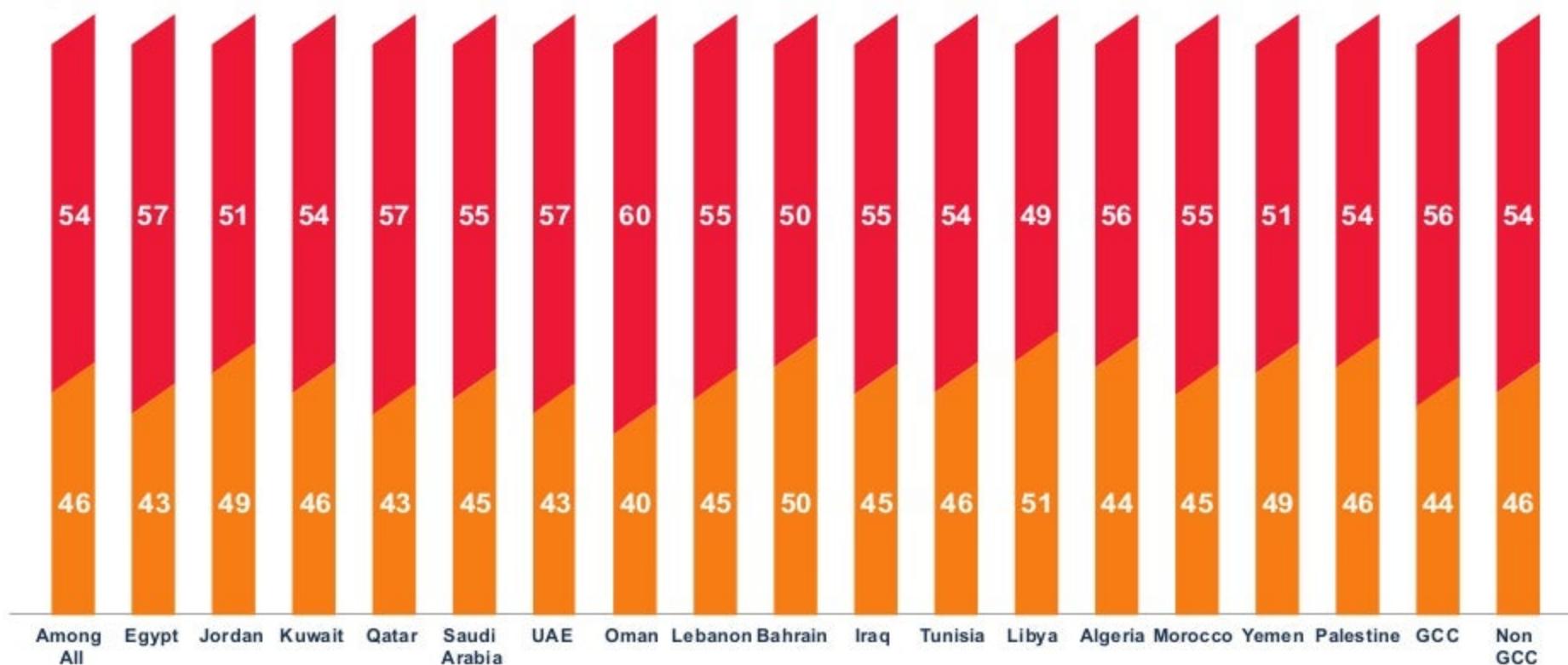


VALUES AND BELIEFS BY COUNTRY

■ Traditional values mean a lot to me, and ought to be preserved for generations to come.

■ Traditional values are outdated and belong in the past. I am keen to embrace modern values and beliefs.

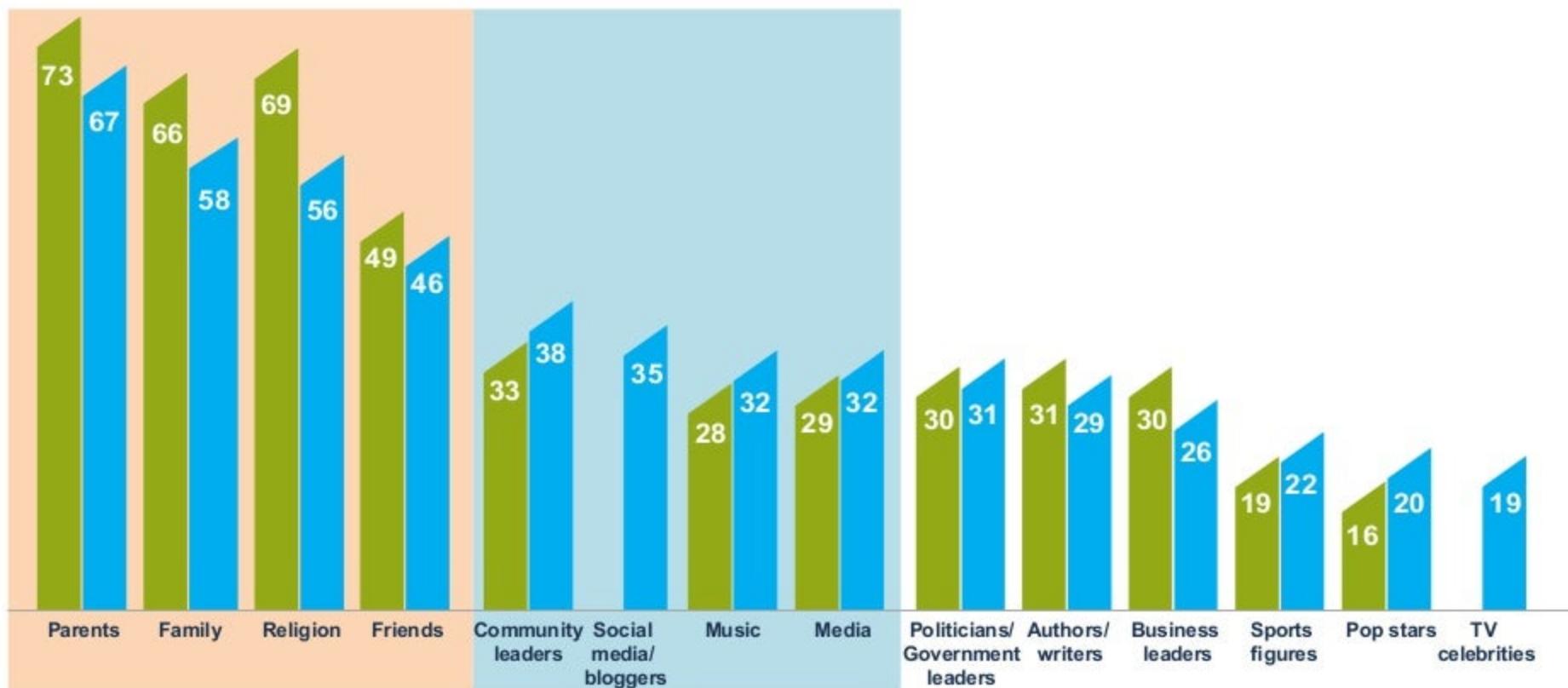
2014



LIFE INFLUENCES

How far would you say each of the following influence you and your outlook on life?
(% Very influential)

■ 2013 ■ 2014



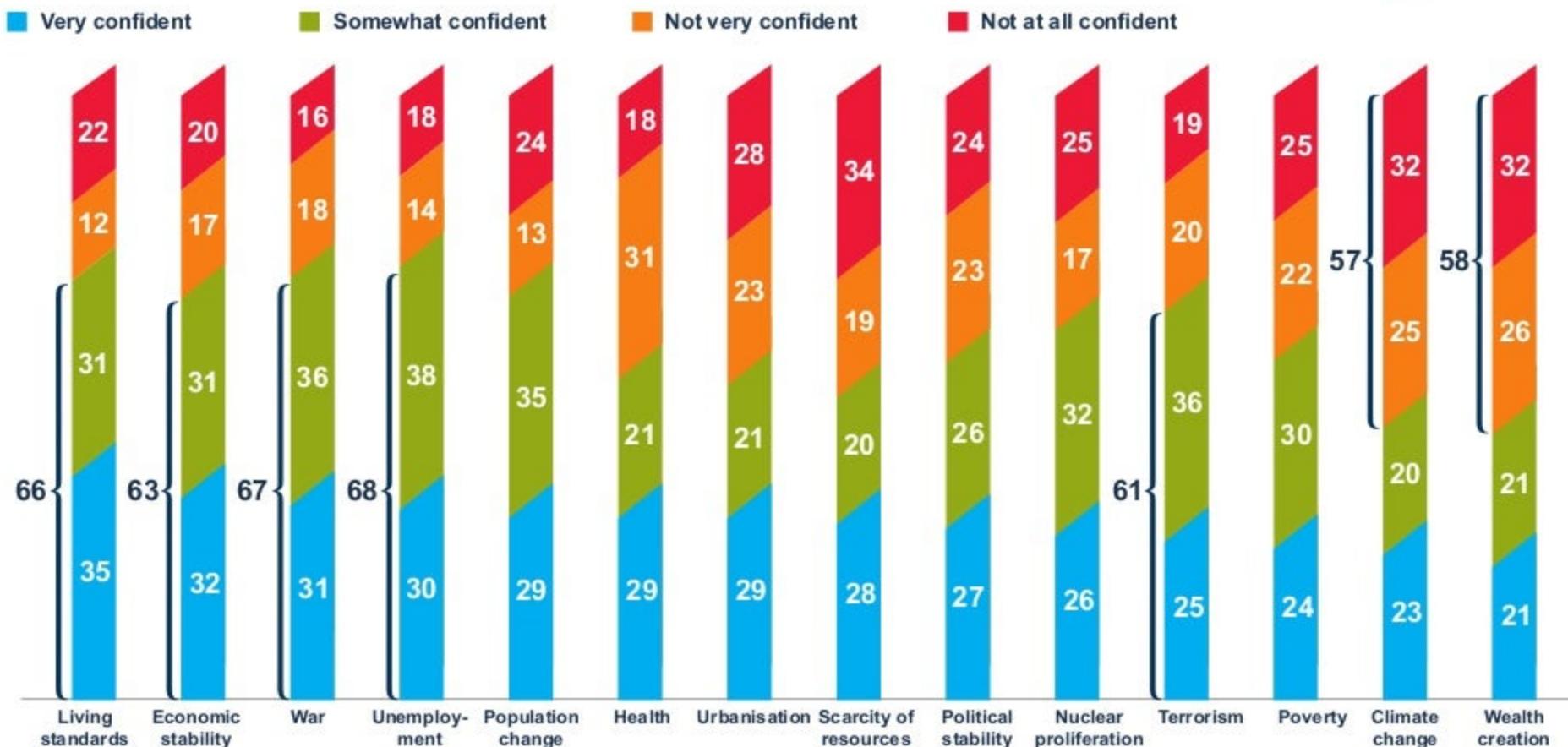
2



YOUNGSTERS ARE CONFIDENT IN THEIR NATIONAL GOVERNMENTS' ABILITY TO DEAL WITH A WIDE RANGE OF ISSUES. CONFIDENCE IN THE LONG TERM IMPACT OF THE ARAB SPRING IS DROPPING

CONFIDENCE IN NATIONAL GOVERNMENTS' ABILITIES

How confident are you in your national governments' abilities to deal with the following issues?



IMPACT OF THE ARAB SPRING

How far do you agree or disagree with the following?

Following the uprisings across the Arab world, I feel the Arab world is better off



As a result of the uprising, I feel I will be better off in five years



3



RISING LIVING COSTS AND UNEMPLOYMENT ARE THE BIGGEST CONCERNS FOR YOUTH ACROSS THE MIDDLE EAST

CONCERN ABOUT KEY ISSUES

How concerned would you say you are about each of the following issues?
 (% Very concerned) (Top 5)

■ 2011 ■ 2012 ■ 2013 ■ 2014

Rising cost of living



Unemployment



National economy *



Opportunities for women



Threat of terrorism



* New category in 2014

CONCERN ABOUT KEY ISSUES-GCC/NON-GCC SPLIT

How concerned would you say you are about each of the following issues?
(% Very concerned)

Rising cost of living

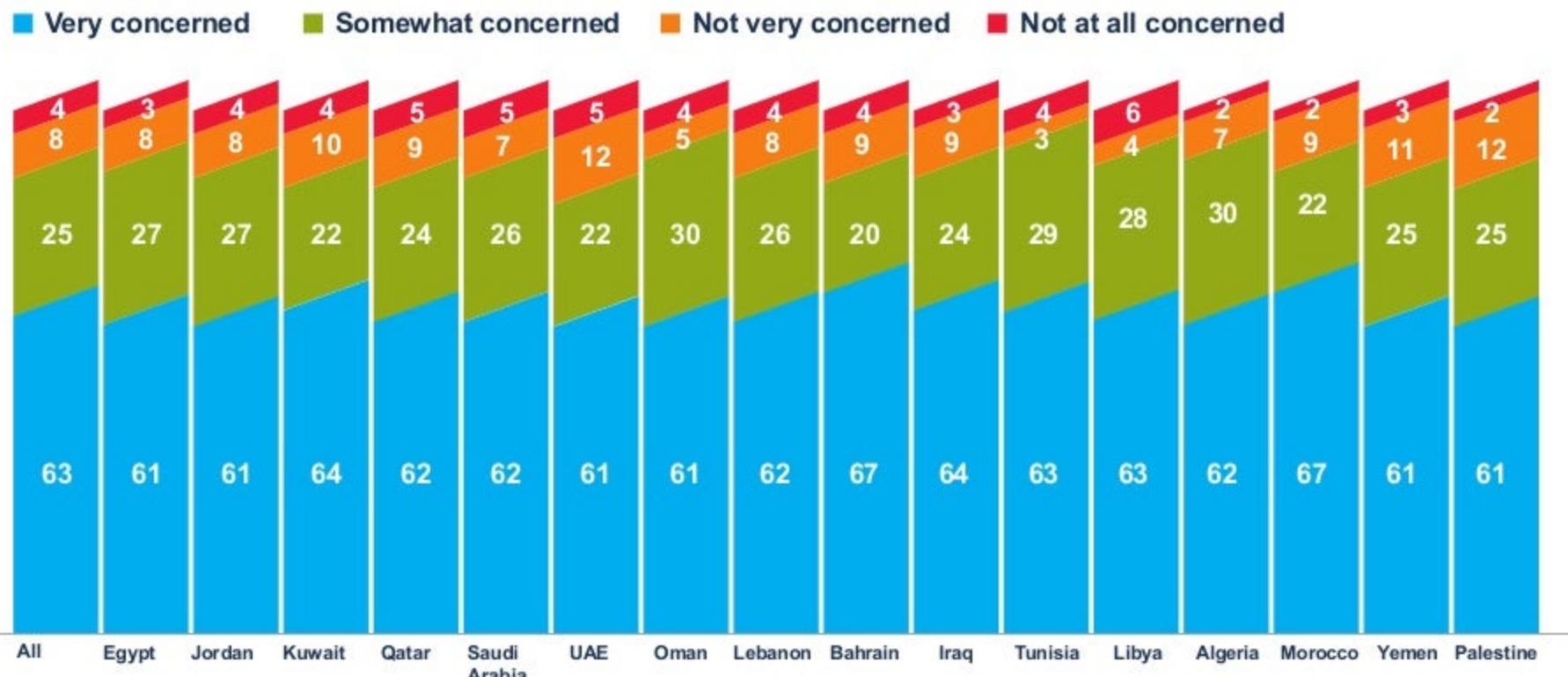


Unemployment



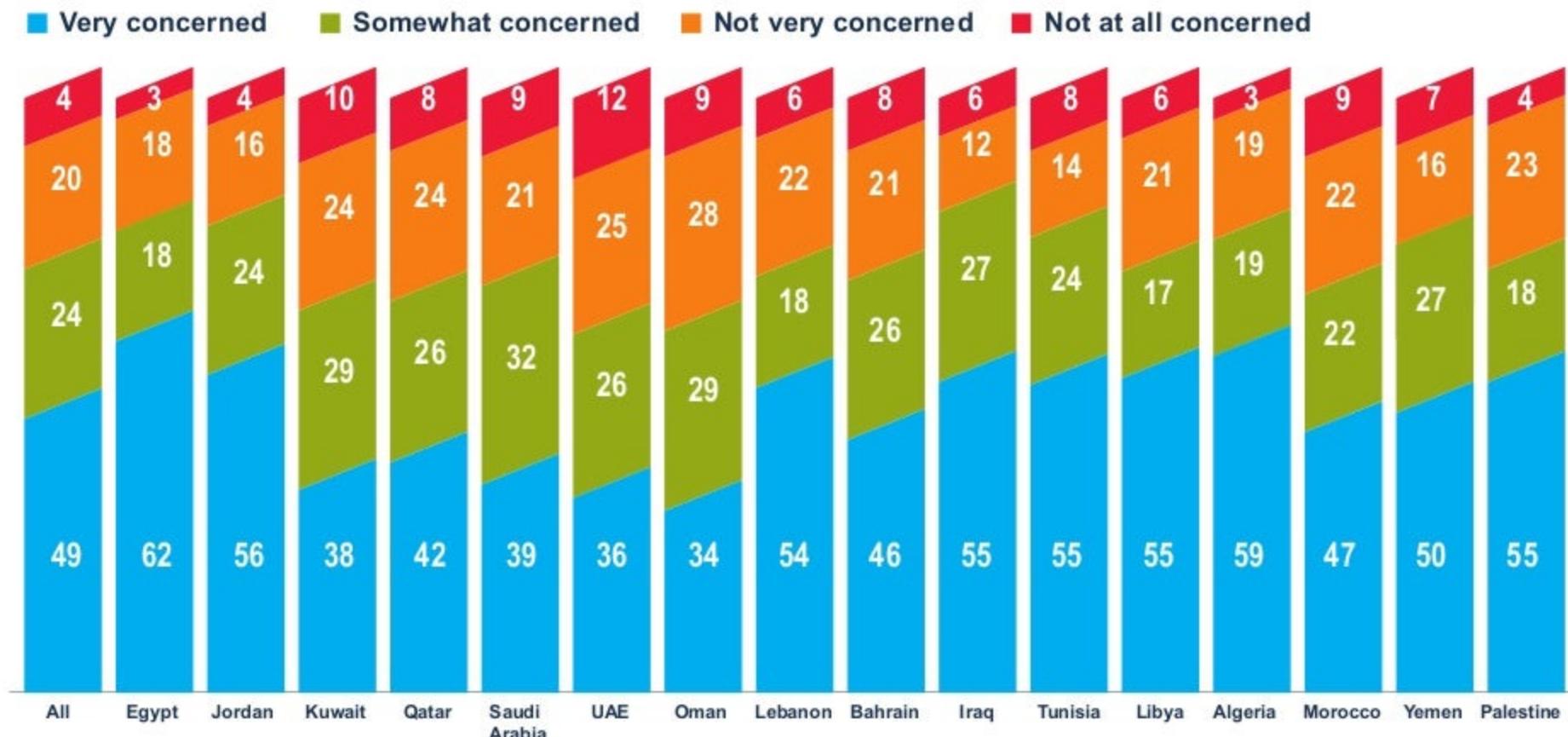
CONCERN ABOUT THE RISING COST OF LIVING BY COUNTRY

How concerned would you say you are about the rising cost of living?



CONCERN ABOUT UNEMPLOYMENT BY COUNTRY

How concerned would you say you are about each of the following issues?



A large, semi-transparent photograph of a young woman with dark hair, looking thoughtfully to the right. She is positioned in front of a world map where the Arab region is highlighted in red and blue.

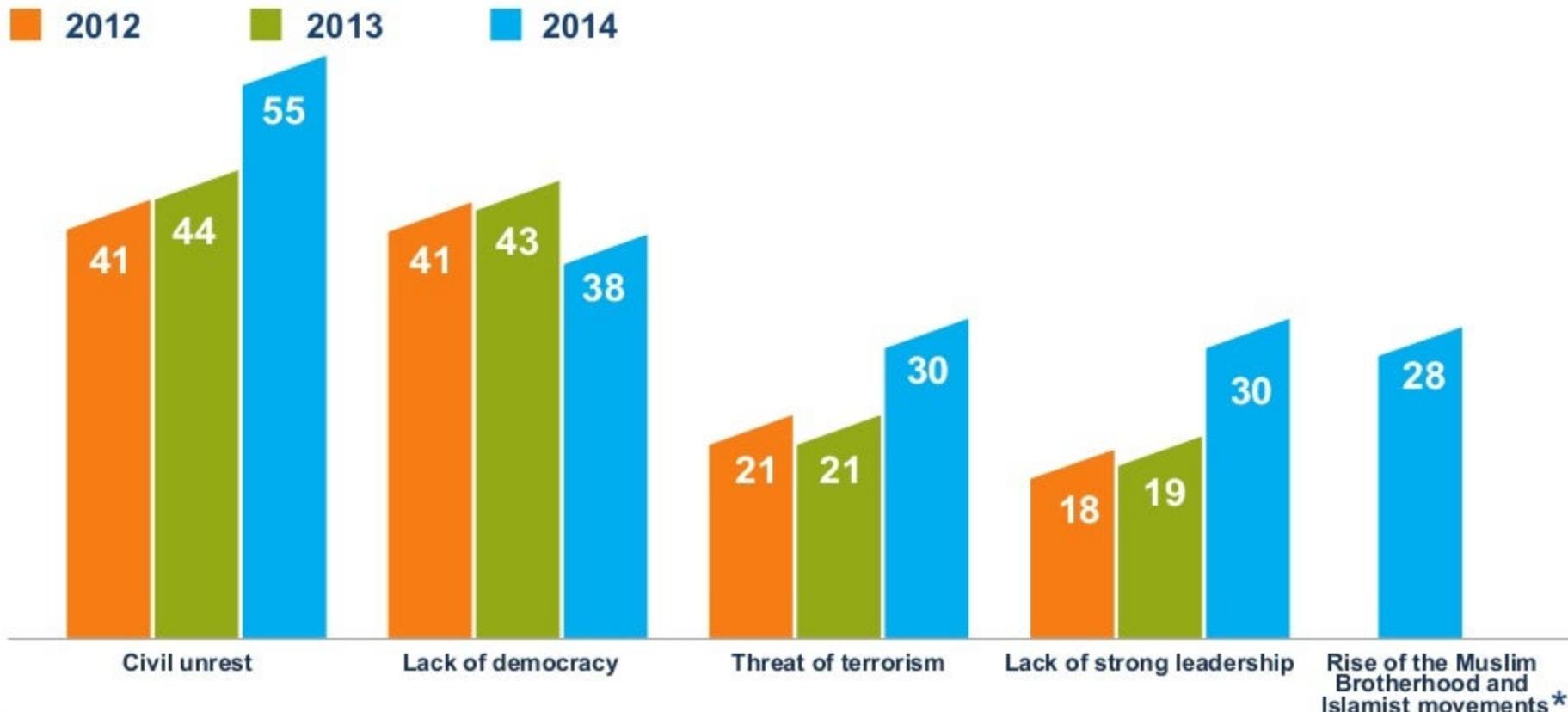
4

**ARAB YOUTH BELIEVE THAT CIVIL
UNREST IS THE BIGGEST OBSTACLE
FACING THE REGION**

BIGGEST OBSTACLES FACING THE MIDDLE EAST

What do you believe is the biggest obstacle facing the Middle East?

(Top 5)



* New category in 2014

TOP TWO OBSTACLES-GCC/NON-GCC SPLIT

What do you believe is the biggest obstacle facing the Middle East?

(Top 2)

Civil unrest



Lack of democracy





5

ENTREPRENEURIAL SPIRIT IS HIGH
AND A GROWING NUMBER OF YOUNG
ARABS WOULD LIKE TO WORK IN
THE PRIVATE SECTOR

ENTREPRENEURSHIP BY COUNTRY

Do you feel people of this generation are more likely to start a business than in previous generations?

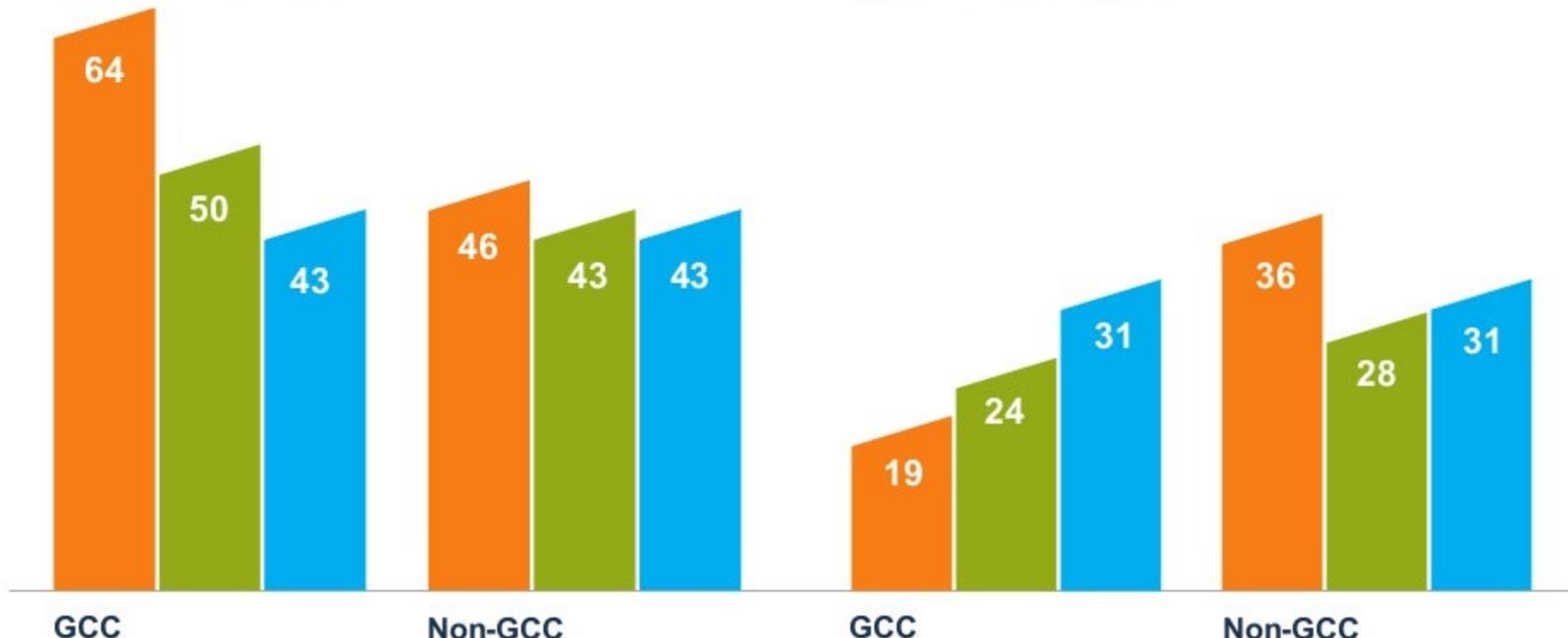


WORK SECTOR PREFERENCE-GCC/NON-GCC SPLIT

Would you prefer to work in government or for the private sector?
(% Private sector and % Government sector)

Government
■ 2012 ■ 2013 ■ 2014

Private Sector
■ 2012 ■ 2013 ■ 2014



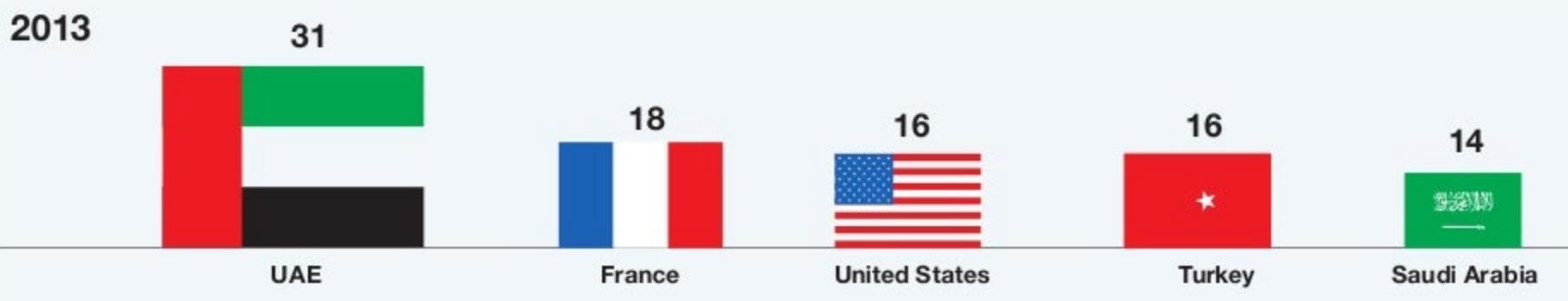
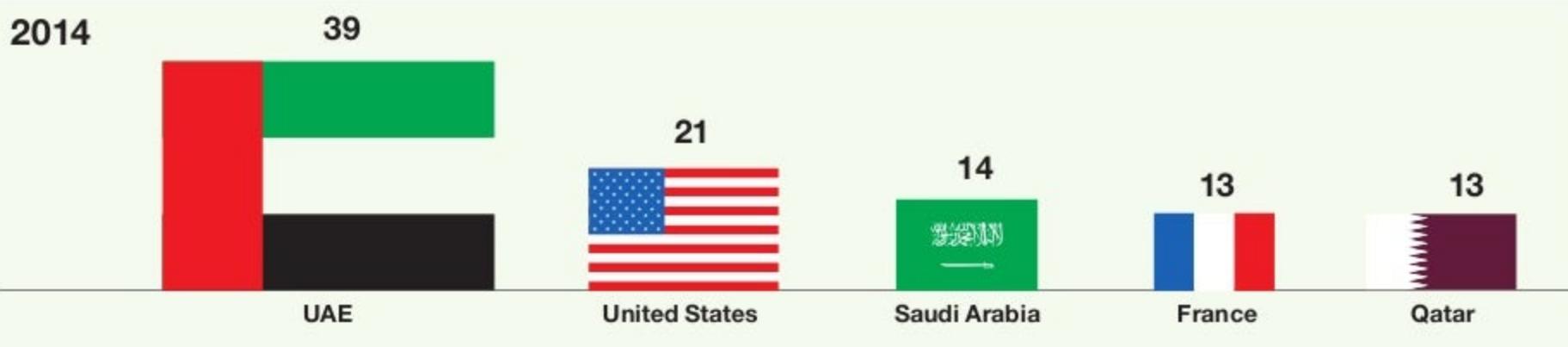
6



THE UAE IS THE COUNTRY THAT MOST ARAB YOUTH WOULD LIKE TO LIVE IN AND IS SEEN AS A MODEL FOR THEIR COUNTRY TO EMULATE

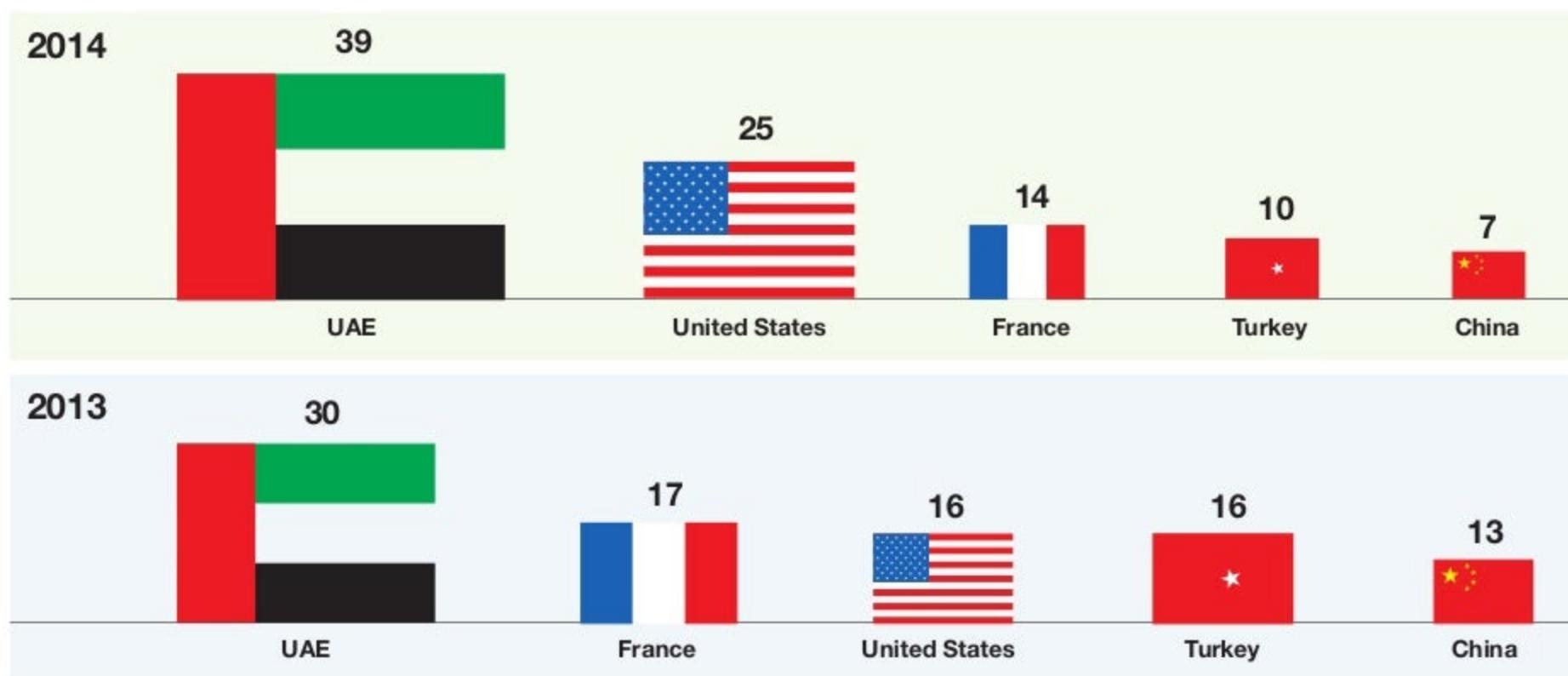
MODEL NATIONS

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



DESIRED COUNTRY TO EMULATE

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





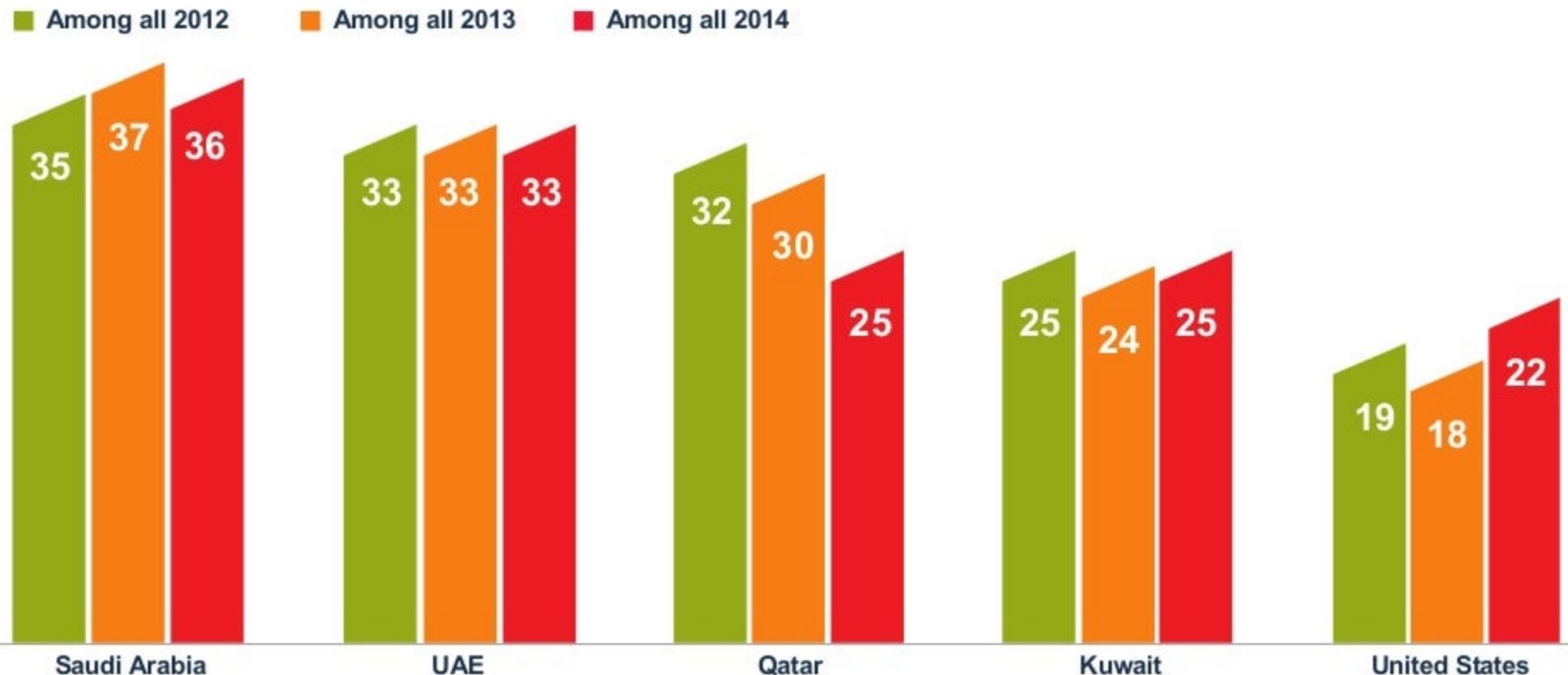
7



ARAB YOUTH CONSIDER THEIR COUNTRY'S BIGGEST ALLIES TO BE REGIONAL NEIGHBOURS SUCH AS SAUDI ARABIA AND THE UAE RATHER THAN TRADITIONAL WESTERN COUNTRIES

COUNTRY'S BIGGEST ALLIES

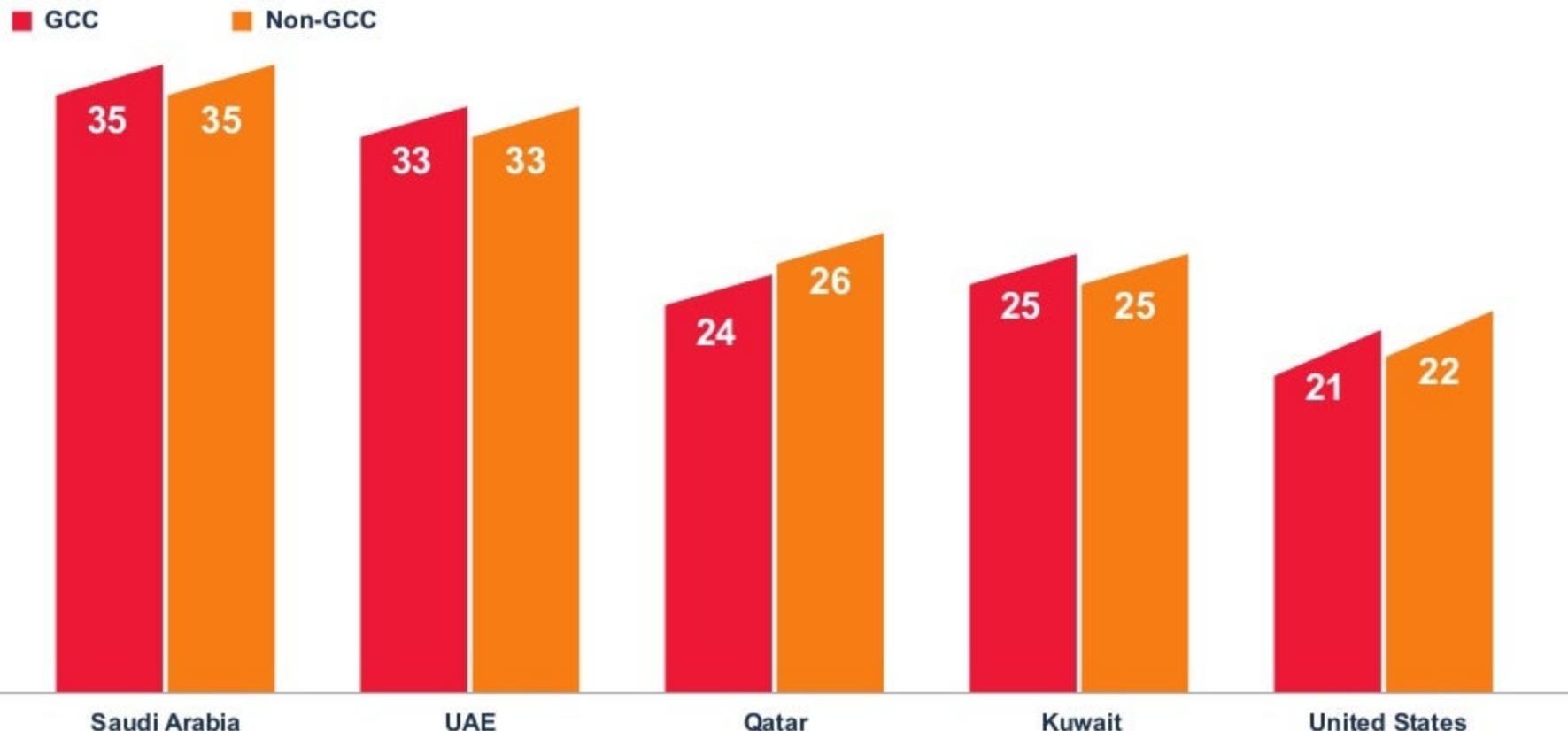
Who would you say is your country's biggest ally?



BIGGEST ALLIES-GCC/NON-GCC SPLIT

Who would you say is your country's biggest ally?

(Top 5)



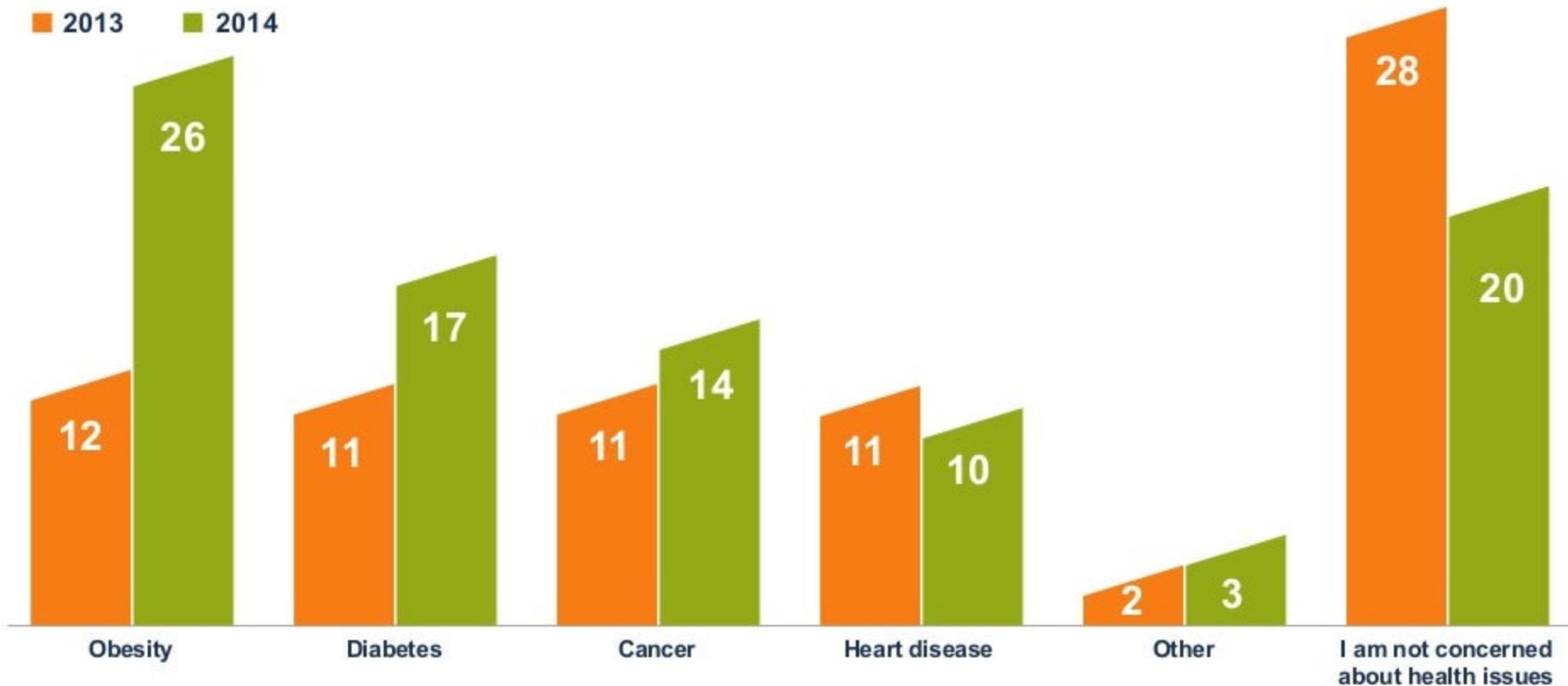
8



ARAB YOUTH ARE INCREASINGLY CONCERNED ABOUT OBESITY AND LIFESTYLE DISEASES AND DO NOT BELIEVE THAT HEALTHCARE IN THEIR COUNTRY IS IMPROVING

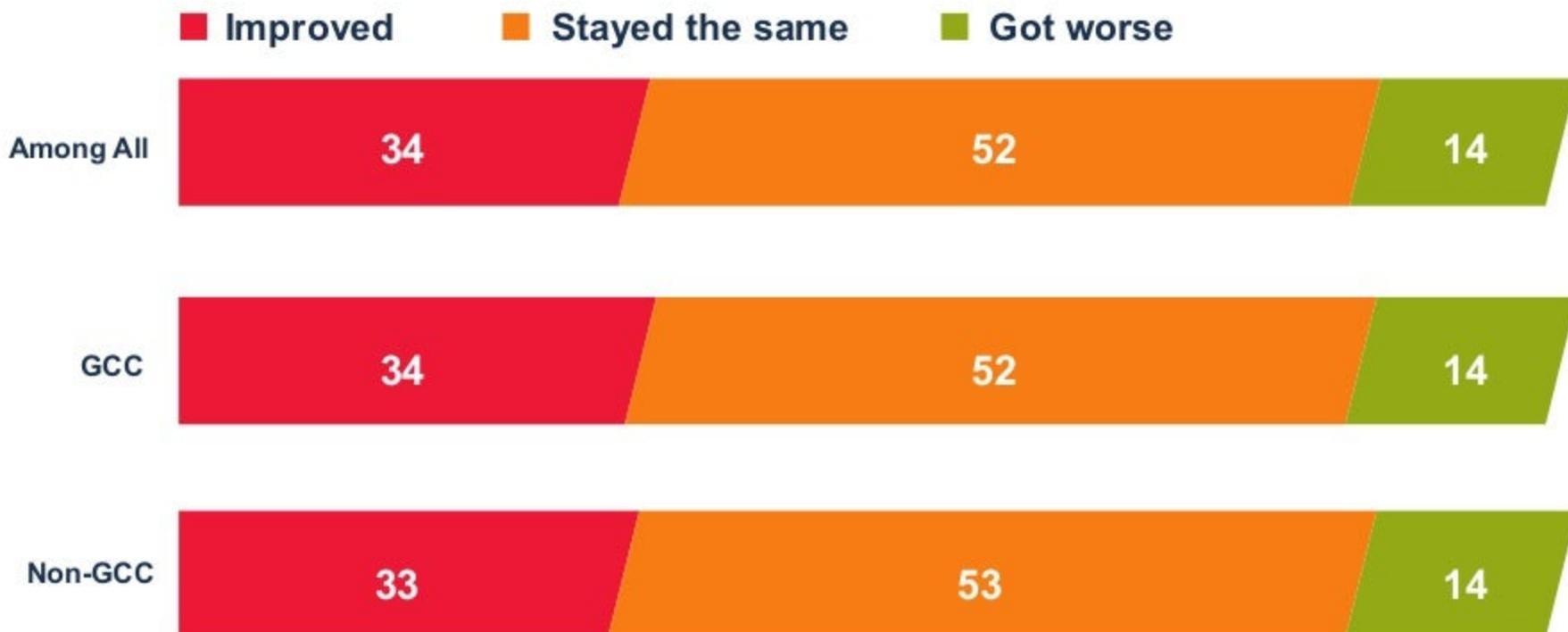
HEALTH ISSUES

Which of the following health issues concerns you most?



HEALTHCARE SERVICES-GCC/NON-GCC SPLIT

In the last year do you feel that the healthcare in your country has...?



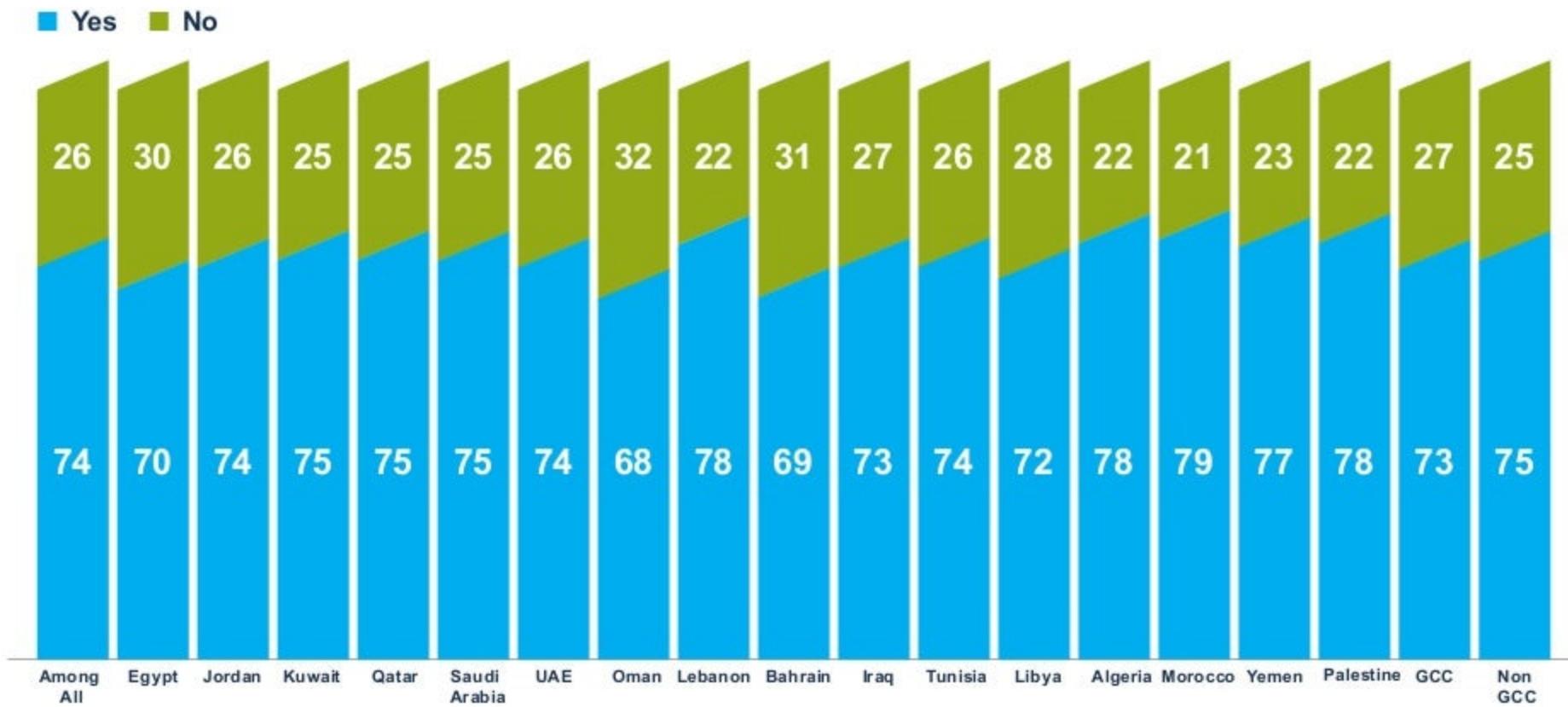
A large green circle on the left contains the number '9'.

9

**AN OVERWHELMING MAJORITY
OF YOUNG ARABS BELIEVE THEY ARE
ENTITLED TO SUBSIDISED ENERGY COSTS,
WHILE CONCERN ABOUT CLIMATE CHANGE
IS LOW ACROSS THE REGION**

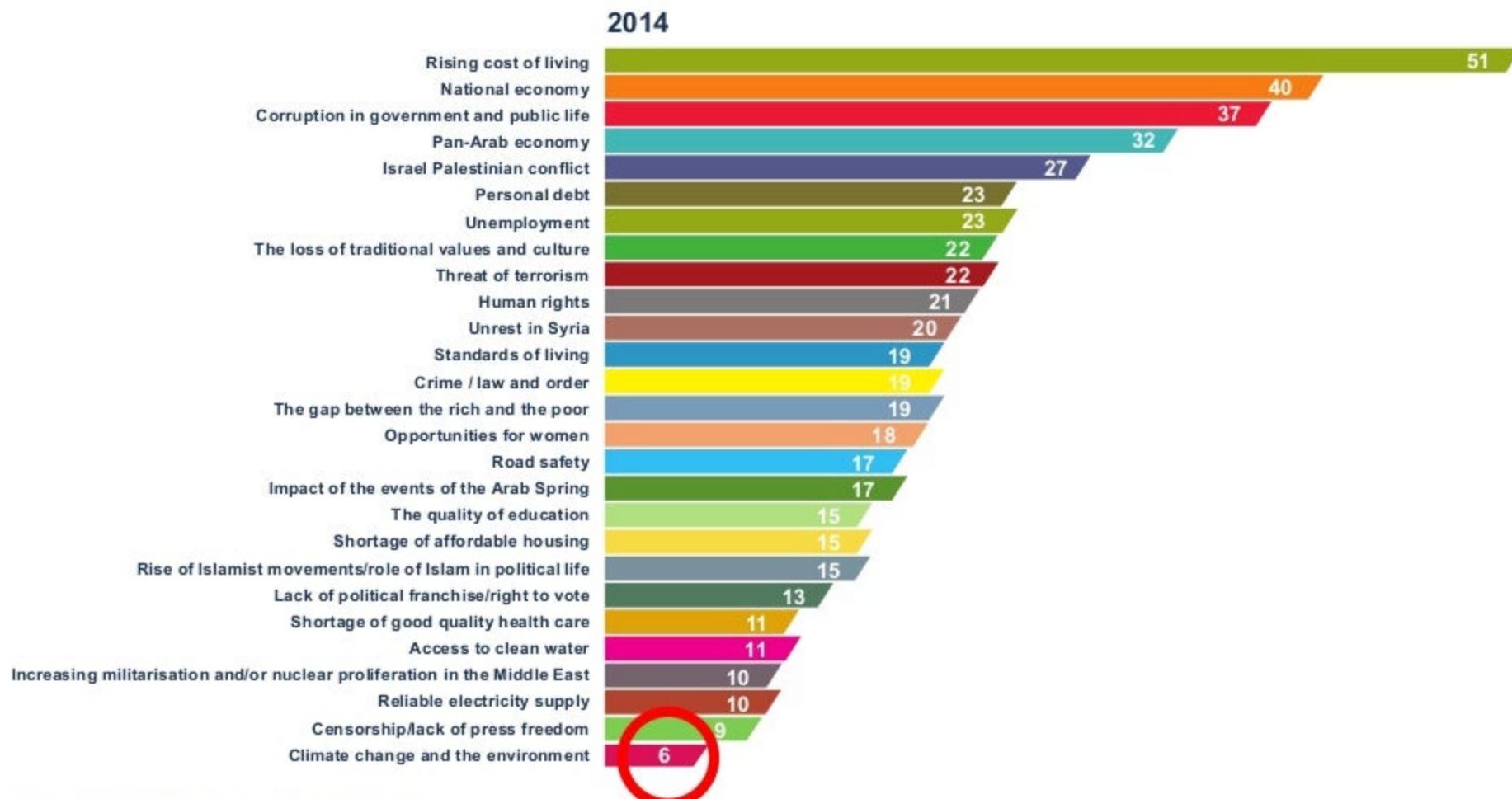
ENERGY SUBSIDIES BY COUNTRY

Do you think energy, electricity and transport fuel such as gasoline and diesel should be subsidised by your government?



BIGGEST CHALLENGE FACING THE MIDDLE EAST

Which of the following would you say is the biggest challenge facing the Middle East today?



Base: Rebased to remove "Don't know"

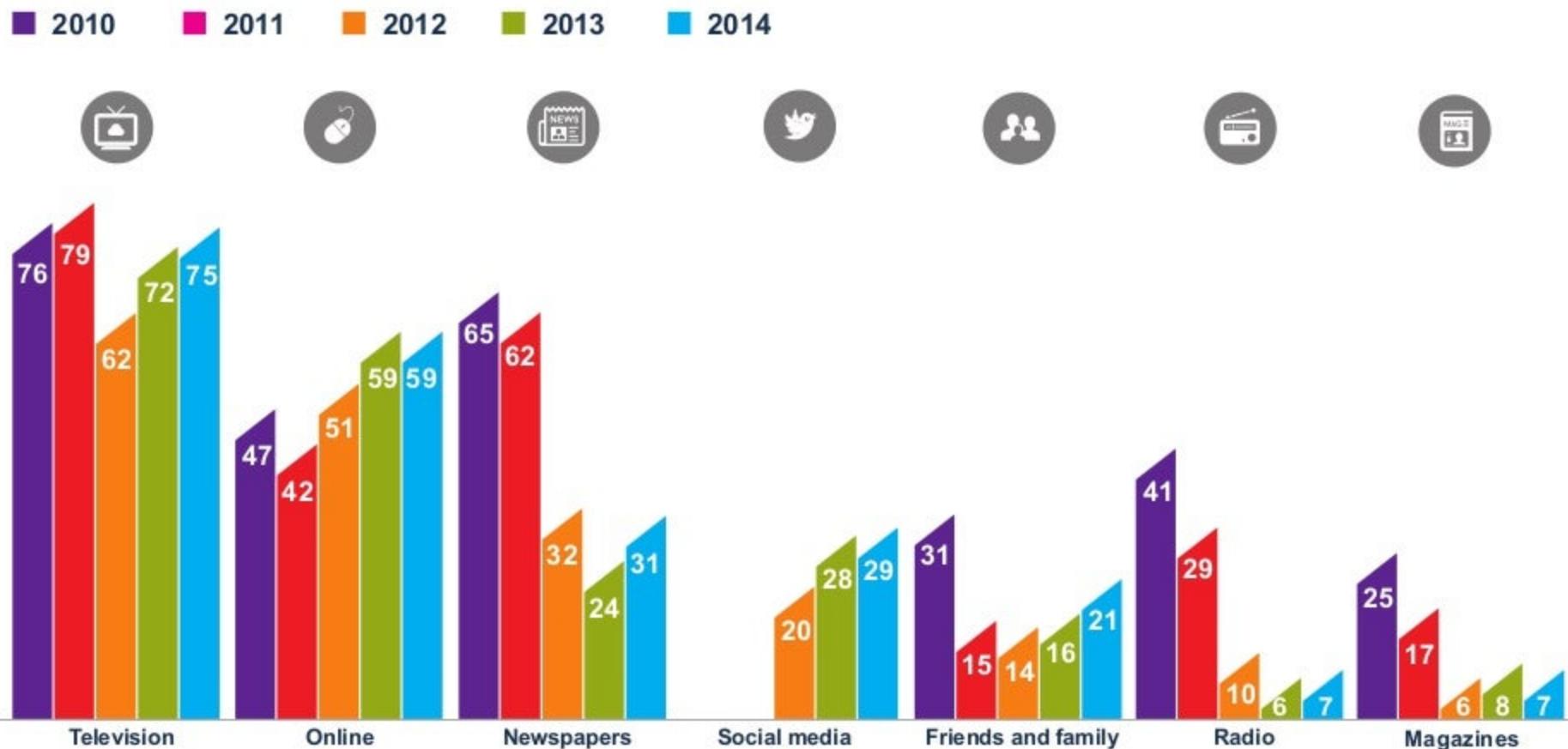
A woman with long brown hair and a blue headscarf is smiling at the camera. She is positioned in front of a world map where the continents are colored in various shades of purple, green, and white. A large orange circle containing the number '10' is overlaid on the left side of the image.

10

TELEVISION IS THE MOST POPULAR SOURCE OF NEWS FOR THE SIXTH YEAR RUNNING, BUT A GROWING NUMBER OF YOUNG ARABS ARE TURNING TO ONLINE AND SOCIAL NETWORKS TO GET THEIR NEWS

NEWS SOURCES

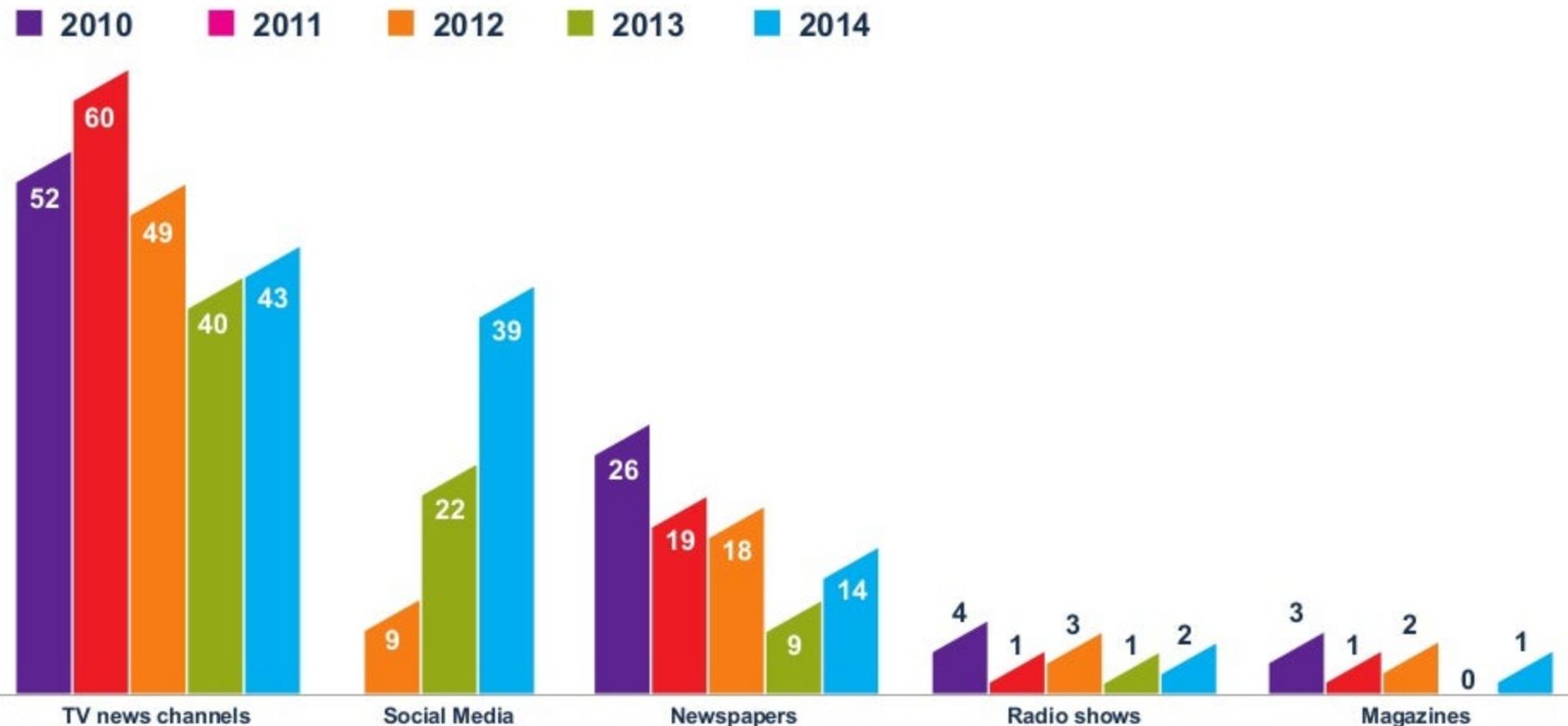
Where do you get your news?



Base: Among All - not showing those that said "Don't know" and "I'm not interested in news"

TRUSTED NEWS SOURCES

In your opinion what is the most trusted source of news?



NEWS CONSUMPTION

How often do you update yourself on news and current affairs?



TOP 10 FINDINGS

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