

Algeria
Bahrain
Egypt
Iraq

Jordan
Kuwait
Lebanon
Libya

Morocco
Oman
Palestine
Qatar

Saudi Arabia
Tunisia
UAE
Yemen

ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2016

— arabyouthsurvey.com —

8TH ANNUAL
ASDA'A BURSON-MARSTELLER
ARAB YOUTH SURVEY

INSIDE
THE HEARTS
AND MINDS
OF ARAB
YOUTH

#استطلاع_رأي_الشباب_العربي
#ArabYouthSurvey

*The Arab Youth Survey 2016 is dedicated to the
Arab world's 200 million youth*

ASDA'A Burson-Marsteller



ARAB YOUTH SURVEY 2016

— arabyouthsurvey.com —

“Inside the Hearts and Minds of Arab Youth”

A White Paper on the Findings of the ASDA'A
Burson-Marsteller Arab Youth Survey 2016

Published in 2016 by ASDA'A Burson-Marsteller

This White Paper can be obtained from
www.arabyouthsurvey.com

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Sunil John

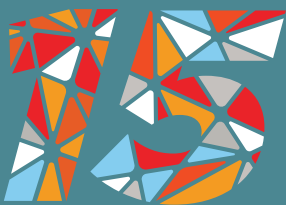
Sunil John is the founder and chief executive of ASDA'A Burson-Marsteller. He has been at the heart of the public relations business in the Middle East for more than two decades. During this time he has shaped ASDA'A Burson-Marsteller to be the benchmark public relations consultancy in the Arab world. Sunil also leads the agency's research firm PSB Middle East and its digital marketing subsidiary, Proof Integrated Communications. Sunil is the first PR professional in the Middle East to receive the Outstanding Individual Achievement SABRE Award (EMEA) from The Holmes Report in May 2014 and has been ranked No. 12 in The GCC's 100 most powerful Indians by Arabian Business magazine.

“

There are 200 million young people in the Middle East and North Africa. Always spirited, often frustrated, they represent either the region's biggest dividend, or its biggest threat. It is my personal view that they are a dividend; a wellspring of untapped potential to rival any oil or gas field, and a net benefit to the region and the world. The governments of the Middle East and North Africa cannot afford to let them down.

”

CELEBRATING



YEARS

A GENERATION IN TRANSITION

This is the eighth year that ASDA'A Burson-Marsteller has published its Arab Youth Survey, a unique and valuable insight into the mindset of this region's most important demographic – its youth.

Conceived before the tumultuous days of the Arab Spring, each Survey has provided a remarkable snapshot of a region – and a people – in transition. This year's Survey is our most compelling yet, highlighting the ambitions, hopes and very real fears of young people at a time when the region is facing its most serious challenges for a generation or more.

This year, for the first time, we have asked expert commentators from the region, Europe and the US to analyse the responses, providing fresh insight and context to help further understand the Survey findings.

From the open conflicts in Syria and Yemen, forcing millions to leave their homes and their families for an uncertain future, the re-emergence of Iran as a regional power to the financial pressures being felt by the dramatic fall in oil prices, this year's Survey offers a sobering look at a region at a crossroads.

That's not to say that the findings are all gloomy. On the contrary, one of the key takeaways from this year's Survey, and the preceding ones, is that the region's youth still find glimpses of optimism in the face of adversity. This should not be too surprising, what with exuberance, self-belief and positive energy being the hallmarks of youth.

Most heartening is how little appeal extremist groups like Daesh (ISIS) actually have among young people; the group's savage tactics and twisted interpretation of Islam are roundly rejected by the overwhelming majority of young Arabs.

The rise of Iran, too, has given some surprising results. While Arab youth are wary of the new power in the region, almost half backed the nuclear deal that brought Tehran in from the cold. And while most young Arabs believe the Sunni-Shia divide has grown over the past five years, and is helping to fuel regional unrest, it seems the youth of today are increasingly concerned about the role they believe religion plays in fueling conflict.

“This year's Survey is published as ASDA'A Burson-Marsteller marks its 15th year in business. As the region's leading public relations consultancy, we understand the value of evidence-based insights, and we have witnessed how these findings are being used to help policy makers and businesses understand and reach out to youth. This Survey is our way of giving something of real value back to the community in which we have prospered, and it is an initiative of which I am very proud.”

If there has been one constant over the near decade we have been compiling this report, it has been employment, or rather the lack of it. This year's Survey adds a dangerous dimension; young people today see a lack of job opportunities as the single biggest factor driving a minority of their brethren into the arms of Daesh and other extremist groups.

The stark reality is that fewer than half of all Arab youth believe they have decent prospects in the jobs market. The International Labour Organisation believes up to 75 million young people alone are jobless in the Arab world. This depressing statistic, and the corresponding pessimism felt by so many responders to our Survey, is a damning indictment of the governments that have failed to address this key issue.

Indeed, unemployment and a lack of opportunity was the main trigger behind the Arab Spring. But the surge of hope in those heady days has given way, just five years later, to a grim realism in the minds of the region's young people. With the legacy of those uprisings being viewed increasingly negatively, young people today now favour stability over democracy. This puts them in a dilemma: young people also want to see more personal freedom and less restrictions on what they can say; at the same time, this freedom is being curbed by their governments, ostensibly in the interest of the very stability they crave.

And, in another sign that youth are struggling to make sense of a changing order, while the overwhelming majority are concerned about the impact of declining oil revenues, they still want their governments to continue to subsidise electricity, energy and fuel.

This year's Survey is published as ASDA'A Burson-Marsteller marks its 15th year in business. As the region's leading public relations consultancy, we understand the value of evidence-based insights, and we have witnessed how these findings are being used to help policy makers and businesses understand and reach out to youth. This Survey is our way of giving something of real value back to the community in which we have prospered, and it is an initiative of which I am very proud.

There are 200 million young people in the Middle East and North Africa. Always spirited, often frustrated, they represent either the region's biggest dividend, or its biggest threat. It is my personal view that they are a dividend; a wellspring of untapped potential to rival any oil or gas field, and a net benefit to the region and the world. The governments of the Middle East and North Africa cannot afford to let them down.

METHODOLOGY

The 8th Annual ASDA'A Burson-Marsteller Arab Youth Survey 2016 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 11 to February 22, 2016 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, impact of unemployment and declining oil prices, their views on women's rights, the impact of the Arab Spring and their media consumption habits.

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 Palestine 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 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.



**PENN
SCHOEN
BERLAND**

**3,500 FACE-TO-
FACE INTERVIEWS
CONDUCTED
BY PSB**

**ARAB YOUTH IN
THE AGE GROUP
OF 18-24 YEARS**

**COUNTRY
NATIONALS
ONLY**

**SAMPLE
SPLIT 50:50
MALE/FEMALE**

SAMPLE DETAILS:

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%			

ORIGINAL COUNTRIES IN 2008-10

SAMPLE DETAILS:

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%		

NEW COUNTRY IN 2011

NEW COUNTRY IN 2012

NEW COUNTRY IN 2013

NEW COUNTRY IN 2014

16 COUNTRIES:

GCC: BAHRAIN, KUWAIT, OMAN, QATAR, SAUDI ARABIA AND UAE

LEVANT & YEMEN: JORDAN, IRAQ, LEBANON, PALESTINE AND YEMEN

NORTH AFRICA: ALGERIA, EGYPT, LIBYA, MOROCCO AND TUNISIA

TOP 10 FINDINGS

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

1

AN OVERWHELMING MAJORITY OF YOUNG ARABS REJECT DAESH (ISIS) AND BELIEVE THE GROUP WILL FAIL TO ESTABLISH AN ISLAMIC STATE.

2

LACK OF JOBS AND OPPORTUNITIES IS SEEN AS THE NUMBER ONE RECRUITMENT DRIVER FOR DAESH.

3

MANY YOUNG ARABS BELIEVE SUNNI-SHIA RELATIONS ARE DETERIORATING AND THAT RELIGION PLAYS TOO BIG OF A ROLE IN THE MIDDLE EAST.

4

SAUDI ARABIA, UAE, AND THE UNITED STATES ARE SEEN AS TOP ALLIES IN THE REGION WHILE IRAN'S INFLUENCE IS ON THE RISE.

5

YOUNG ARABS ARE DIVIDED ON THE IRANIAN NUCLEAR DEAL AND THE SYRIAN CONFLICT.

6

FIVE YEARS AFTER FIGHTING FOR POLITICAL FREEDOM DURING THE ARAB SPRING, TODAY MOST YOUNG ARABS PRIORITISE STABILITY OVER DEMOCRACY.

7

ARAB YOUTH WANT THEIR LEADERS TO DO MORE TO IMPROVE THE PERSONAL FREEDOM AND HUMAN RIGHTS OF CITIZENS, PARTICULARLY WOMEN.

8

THE UAE IS VIEWED AS A MODEL COUNTRY THAT IS ECONOMICALLY SECURE, AND IS THE MOST FAVOURED NATION TO LIVE IN AND SET UP A BUSINESS.

9

ARAB YOUTH ARE INCREASINGLY CONCERNED ABOUT FALLING OIL PRICES, BUT MOST STILL BELIEVE THEY ARE ENTITLED TO SUBSIDISED ENERGY.

10

MORE YOUNG ARABS GET THEIR DAILY NEWS ONLINE THAN FROM TV OR PRINT MEDIA.

1

**AN OVERWHELMING MAJORITY
OF YOUNG ARABS REJECT
DAESH (ISIS) AND BELIEVE THE
GROUP WILL FAIL TO ESTABLISH
AN ISLAMIC STATE.**

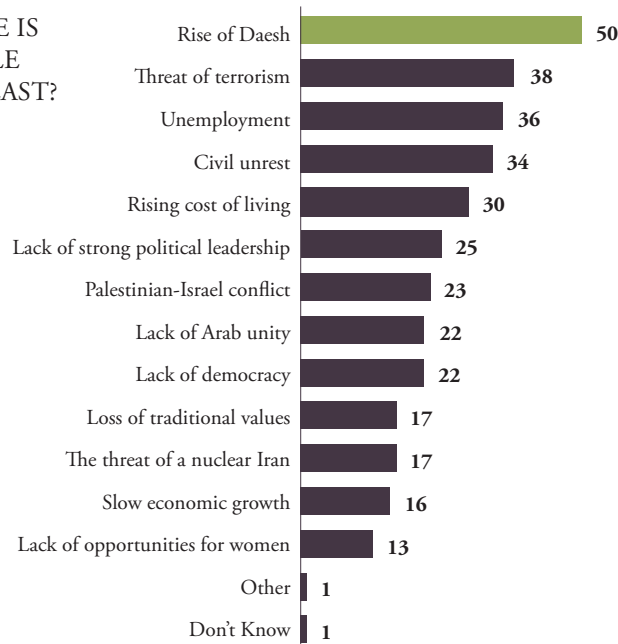
While three in four (77 per cent) Arab youth are concerned about the rise of Daesh, just one in six (15 per cent) believe the terrorist group will ultimately succeed and establish an Islamic state in the Arab world. Instead, 76 per cent believe the group will fail to achieve its ultimate goal of establishing an Islamic state.

Concern about the rise of the group is increasing with youth citing it as the biggest obstacle facing the region for the second year running. In 2016, 50 per cent of youth in the 16 countries polled believe it is the biggest issue in the region, up from 37 per cent last year.

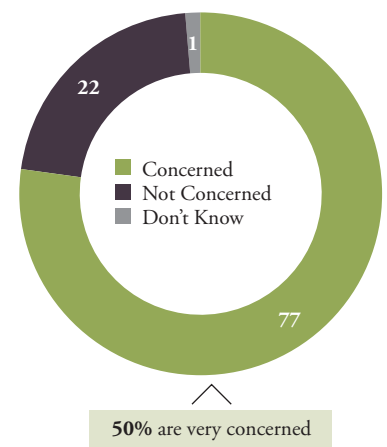
Despite increasing concern, tacit support for the militant group is declining with nearly four in five (78 per cent) rejecting the group outright even if it were to change its tactics – just 13 per cent of young Arabs agree they could see themselves supporting Daesh if it did not use so much violence (compared to 19 per cent last year).

FOR THE SECOND YEAR IN A ROW, ARAB YOUTH VIEW THE RISE OF DAESH AS THE TOP OBSTACLE FACING THE MIDDLE EAST AND NEARLY 4 IN 5 EXPRESS CONCERN ABOUT THE TERRORIST GROUP'S RISE.

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

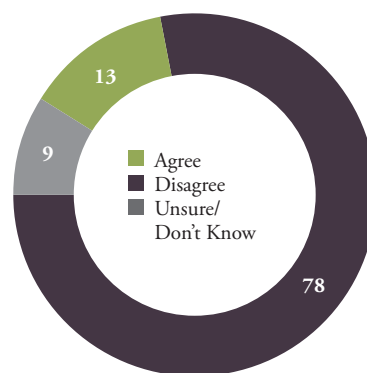


HOW CONCERNED WOULD YOU SAY YOU ARE ABOUT THE RISE OF DAESH?

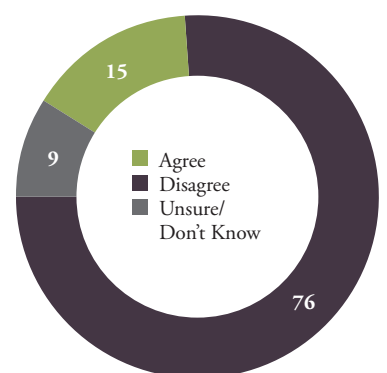


NEARLY 4 IN 5 YOUNG ARABS RULE OUT ANY SUPPORT FOR THE GROUP EVEN IF DAESH STOPPED USING SO MUCH VIOLENCE AND MOST BELIEVE IT WILL ULTIMATELY FAIL TO ESTABLISH AN ISLAMIC STATE.

“IF DAESH DID NOT USE SO MUCH VIOLENCE, I COULD SEE MYSELF SUPPORTING IT”



“DAESH WILL ULTIMATELY ESTABLISH AN ISLAMIC STATE IN THE ARAB WORLD”



2

**LACK OF JOBS AND
OPPORTUNITIES IS SEEN AS THE
NUMBER ONE RECRUITMENT
DRIVER FOR DAESH.**

A quarter (24 per cent) of Arab youth believe that lack of jobs and opportunities for young people is one of the primary reasons why some are attracted to Daesh. Interestingly, one in four (25 per cent) do not understand why anyone would want to join the militant group.

Other specific reasons as to why some young people are attracted to Daesh included “the belief that their interpretation of Islam is superior to others” (18 per cent), “religious tensions between Sunnis and Shias” (17 per cent) and “the rise of secular Western values in the region” (15 per cent).

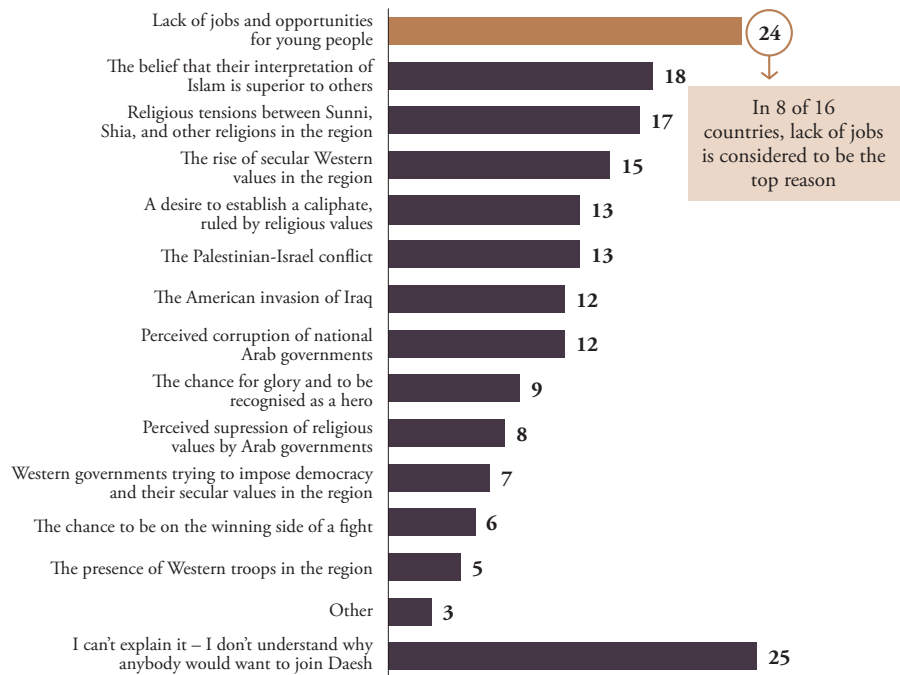
Concern about lack of job opportunities remains an issue across the 16 countries polled with fewer than half (44 per cent) agreeing with the statement that there are good job opportunities in the areas they live in.

That concern is particularly high in those countries where Daesh has actively recruited young people. Just 2 per cent of young Yemenis, 7 per cent of Libyans, 20 per cent of Palestinians, 21 per cent Lebanese, 28 per cent of Tunisians, and 39 per cent of young Iraqis believe they have good job opportunities available to them in their country.

Job opportunities remain a major issue across the Arab world with one in four 15-24 year olds unemployed, the highest youth unemployment rate in the world, according to the World Bank.

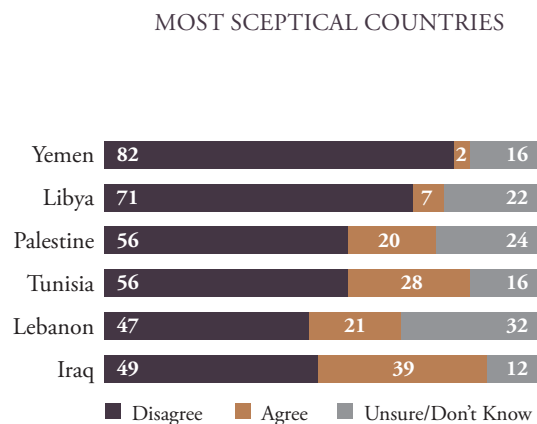
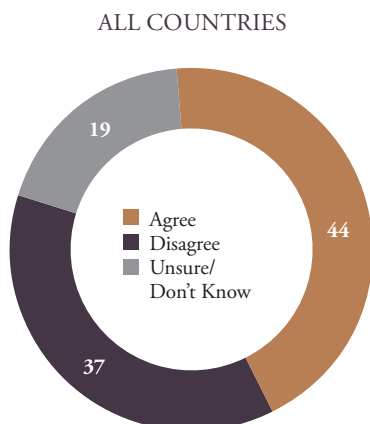
LACK OF JOBS IS SEEN AS THE TOP REASON YOUNG ARABS BELIEVE PEOPLE JOIN DAESH, ALTHOUGH 1 IN 4 DO NOT UNDERSTAND WHY ANYBODY WOULD JOIN THE GROUP.

WHICH OF THE FOLLOWING, IF ANY, DO YOU THINK ARE THE PRIMARY REASONS WHY SOME YOUNG PEOPLE ARE ATTRACTED TO DAESH? PLEASE CHOOSE UP TO THREE REASONS.



FEWER THAN HALF OF ARAB YOUTH BELIEVE THERE ARE GOOD JOB OPPORTUNITIES AVAILABLE TO THEM, AND THE ISSUE IS PARTICULARLY ACUTE IN THE COUNTRIES WHERE DAESH HAS ACTIVELY RECRUITED YOUNG PEOPLE.

HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?
“THERE ARE GOOD JOB OPPORTUNITIES IN THE AREA I LIVE IN”





Hassan Hassan

Hassan Hassan is a resident fellow at the Tabvir Institute for Middle East Policy, in Washington DC, and associate fellow at the London-based think tank Chatham House. He focuses on Syria, Iraq and the Gulf States, and studies Islamist, Salafist and jihadist movements in the wider region. He is also a columnist for The National newspaper in Abu Dhabi, and a regular contributor to The Guardian, Foreign Policy, Foreign Affairs and The New York Times. He is the co-author of the bestselling book ISIS: Inside the Army of Terror.

“ Many people in the region may reject Daesh due to its extreme tactics, but the issue remains that the group exploits existing problems. It did not simply invent the problems the responders identified as factors. Daesh, put another way, is a symptom of a growing disease that needs to be tackled, and not just the disease itself. ”

A FATAL ATTRACTION

What drives young people to join a brutal, ultra-radical group like Daesh? Since its recent rise in Syria and Iraq in 2013, the group declared war primarily on fellow Muslims. It labeled many of those living in the two countries as apostates, and has killed many more of them than it killed outsiders.

Its ideology was widely rejected as a distortion of Islamic values and laws. Everyone from clerics to intellectuals to politicians refused its claims of legitimacy and condemned its atrocities, which included the mass enslavement of Yazidi women in Iraq, beheadings, and even crueler punishments such as dropping people from high buildings. Even like-minded jihadists opposed the organisation and its religious views – Al Qaeda, for example, disavowed it in February 2014.

This trend corresponds to the findings of this year's ASDA'A Burson-Marsteller Arab Youth Survey, which demonstrates that an overwhelming majority of young Arabs reject Daesh and consider it a top threat to the region. The organisation has failed to win the support of those it hoped would gravitate towards the idea of Islamic State or caliphate.

Despite this, however, Daesh still attracts a narrow audience that remains committed to its radical ideas, and it is important to understand this source of appeal, as even this limited appeal can have devastating consequences for the region. It is a challenge that will likely outlive the group even if it's expelled from the area it controls. The number of suicide bombings carried out by the organisation, both in Syria and Iraq and outside, is soaring as the group's territory shrinks due to the relentless campaign against it.

Since the group swept through large swathes of territory in Iraq and Syria in the summer of 2014, I conducted interviews with members and sympathisers of the group. The reasons I found for why people join Daesh vary, and are largely in line with the Survey's findings.

Generally, only two categories of people who join Daesh do so for religious reasons. Most of those who join the group are profiteers, opportunists or because the group was taking control of the areas in which they lived. As responders to the Survey show, lack of jobs and opportunities is often identified as a top driver behind membership in such organisations. Members do not say they join for economic reasons, but other factors they identify — including ones related to religious reasons — could be a proxy of economic or social factors. In other words, members may consciously or unconsciously conceal true motives.

The first category of members who join for religious reasons comprises those long-standing radicals who ardently believe most Muslims have deviated from the right path. They label fellow Muslims as disbelievers who can be killed if they do not convert to their religious ideology. They define Daesh's extremism and ensure its persistence.

The second category includes members who can be seen as victims of the first category. These are typically young, religious novices who were falsely led to believe in religious interpretations propagated by the ultra-radicals. Children and youngsters are a target of Daesh, which seeks to groom them to be the next generation of extremists. Because of their lack of religious awareness, youngsters are easily brainwashed and turned into zealots willing to die for the group.

A third category of Daesh associates are driven to the group because of its political project. Such people tend to sympathise with the organisation rather than become full members, and they may even struggle with the group's savagery. Such people tend to be disillusioned with the established political and religious movements in the region, and believe that Daesh can be a vehicle for change due to its organisation and brutal and uncompromising tactics.

One of the shared characteristics among the three categories is sectarianism. Growing sectarian tensions in the Middle East strengthen the extremist narrative of Daesh, that Shia are the enemies and conflicts involving Iranian-backed militias from Yemen to Lebanon are part of a wider war against Sunni Muslims.

This aligns with the second and third reasons given by the Survey responders for why some young people are attracted to Daesh; namely religious tensions between Sunni, Shia and other religions in the region and the belief that the group's interpretation of Islam is superior to others.

“So, the solution to Daesh must not be limited to military and security responses. The organisation thrives on political, economic, social and religious failures. Daesh may weaken and disappear, but the underlying sickness will remain and similar groups will emerge if that sickness is not addressed. The Survey's findings should be a reminder to everyone that Daesh did not simply materialise out of thin air.”

As tensions grow in the region, attractiveness to extremist groups that claim to be fighting in the name of their sect increases. This raises a key question about the durability of extremist organisations that present themselves as an answer to such religious and political issues. Many people in the region may reject Daesh due to its extreme tactics, but the issue remains that the group exploits existing problems. It did not simply invent the problems the responders identified as factors. Daesh, put another way, is a symptom of a growing disease that needs to be tackled, and not just the disease itself.

So, the solution to Daesh must not be limited to military and security responses. The organisation thrives on political, economic, social and religious failures. Daesh may weaken and disappear, but the underlying sickness will remain and similar groups will emerge if that sickness is not addressed. The Survey's findings should be a reminder to everyone that Daesh did not simply materialise out of thin air.

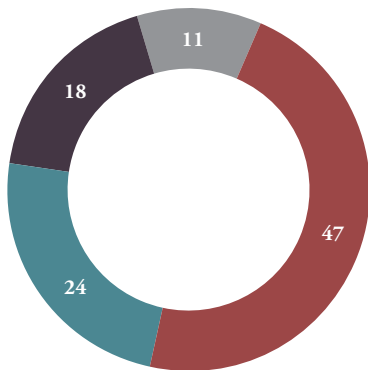
3

**MANY YOUNG ARABS BELIEVE
SUNNI-SHIA RELATIONS ARE
DETERIORATING AND THAT RELIGION
PLAYS TOO BIG OF
A ROLE IN THE MIDDLE EAST.**

When asked to think specifically about Sunni-Shia relations, nearly half (47 per cent) of young Arabs believe that relations between the two sects have worsened in the last five years and only 18 per cent believe they have improved. The belief that the religious divide is worsening is particularly strong in Yemen (88 per cent), Jordan (84 per cent), Libya (75 per cent), and Iraq (62 per cent).

NEARLY HALF OF YOUNG ARABS THINK SUNNI-SHIA RELATIONS HAVE DETERIORATED OVER THE PAST FIVE YEARS, A PERCEPTION THAT EXISTS ACROSS THE ARAB WORLD.

COMPARED TO FIVE YEARS AGO, WOULD YOU SAY THE SUNNI-SHIA RELATIONS HAVE...?



- Worsened
- Stayed about the same
- Improved
- Don't know

COUNTRIES MOST LIKELY TO SAY WORSENERD

(SHOWING % WORSENERD)



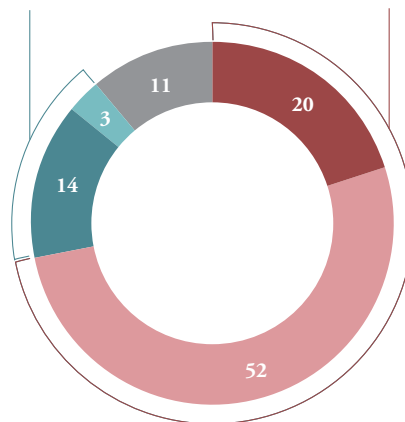
Nearly three in four (72 per cent) young Arabs believe the Sunni-Shia divide has had a significant negative impact on the ongoing unrest in the region – 20 per cent think it is the “primary reason” while another 52 per cent consider the religious divide as one of the “major reasons” for the ongoing regional unrest. Sentiment is similar across the 16 countries polled with 75 per cent of youth in the GCC agreeing it has worsened compared to 73 per cent in the Levant & Yemen, and 65 per cent of young Arabs living in North Africa.

A COMPELLING MAJORITY OF ARAB YOUTH BELIEVE THE SUNNI-SHIA DIVIDE IS A SIGNIFICANT DRIVER OF UNREST IN THE REGION.

WHICH OF THE FOLLOWING IS CLOSEST TO YOUR VIEW ABOUT THE SUNNI-SHIA DIVIDE AND THE ONGOING UNREST IN THE REGION? THE SUNNI-SHIA DIVIDE...

- Is the primary reason for the ongoing unrest in the region
- Is one of the major reasons for the ongoing unrest
- Does not have a significant impact on the ongoing unrest
- Has no impact at all on the ongoing unrest in the region
- Don't know

17% do not think the divide has a significant negative impact 72% think the divide has a significant negative impact



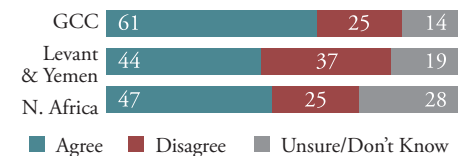
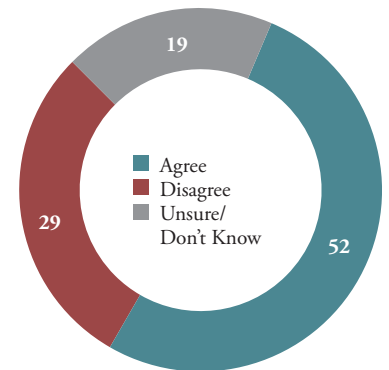
% Significant Negative Impact	
GCC	75%
Levant & Yemen	73%
N. Africa	65%

Over half of young Arabs (52 per cent) agree that religion plays too big of a role in the Middle East while one in three (29 per cent) disagree that the role of religion is too big and 19 per cent are unsure. The notion that religion plays too big a role in the Middle East extends across the Arab world, with 61 per cent of youth in the GCC, 44 per cent in the Levant & Yemen and 47 per cent in North Africa agreeing.

OVERALL, MORE THAN HALF BELIEVE THAT RELIGION PLAYS TOO BIG OF A ROLE IN THE MIDDLE EAST.

HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?

“RELIGION PLAYS TOO BIG OF A ROLE IN THE MIDDLE EAST”



4

**SAUDI ARABIA, UAE, AND THE
UNITED STATES ARE SEEN AS TOP
ALLIES IN THE REGION WHILE IRAN'S
INFLUENCE IS ON THE RISE.**

When asked to think about their country's biggest ally, Arab youth cite Saudi Arabia (31 per cent) for the fifth year running, followed by the UAE (28 per cent), and the United States (25 per cent).

One of the biggest developments in regional relations since 2015 has been the rise of Iran, which has risen to the top 10 allies for the first time in the ASDA'A Burson-Marsteller Arab Youth Survey, with 13 per cent naming the country an ally.

Iran's presence in the top 10 is primarily driven by favourable perceptions in three countries – Iraq, Lebanon, and Palestine – where young Arabs cite Iran more frequently than any other country as one of their biggest allies (51 per cent, 49 per cent, and 43 per cent respectively). Overall, young Arabs are divided on their views of Iran, with 38 per cent viewing Iran as an ally of their country versus 52 per cent who consider the Islamic Republic an enemy.

When asked specifically whether a particular country is an ally or an enemy, 70 per cent perceive Saudi Arabia as an ally. The Kingdom is viewed particularly favourably by youth in the other Gulf states, where 93 per cent consider it an ally.

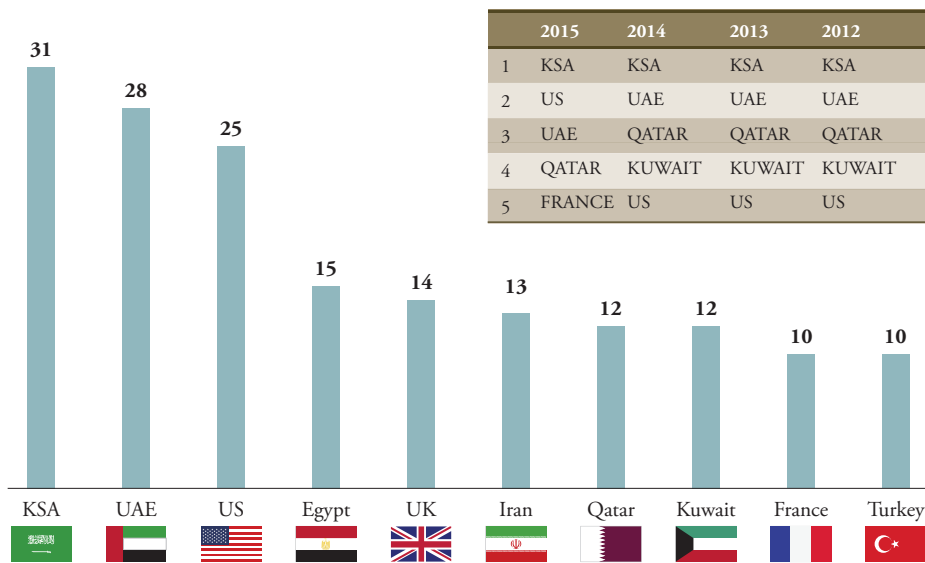
The UAE is also viewed favourably with 72 per cent viewing it as an ally with 93 per cent of youth from fellow Gulf countries supporting it.

Young Arabs are more divided in their perceptions of the United States, with 63 per cent saying they consider it an ally versus 32 per cent who view it an enemy. Perceptions of the US are particularly strong in the GCC where 85 per cent say it is an ally.

Outside the GCC, it's a different story. In Iraq, just 6 per cent of young Iraqis view it an ally, compared to 93 per cent who consider it an enemy. In Yemen, 10 per cent view the US as an ally versus 82 per cent as an enemy, followed by Palestine (16 per cent ally vs. 81 per cent enemy) and Lebanon (35 per cent ally vs. 57 per cent enemy).

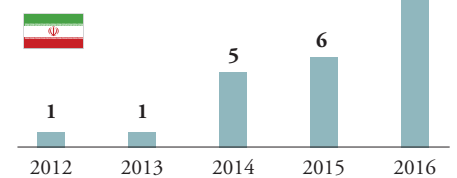
FOR THE FIFTH YEAR RUNNING, SAUDI ARABIA IS SEEN AS THE TOP ALLY IN THE REGION WHILE IRAN'S INFLUENCE IS ON THE RISE.

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



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

(SHOWING % IRAN)

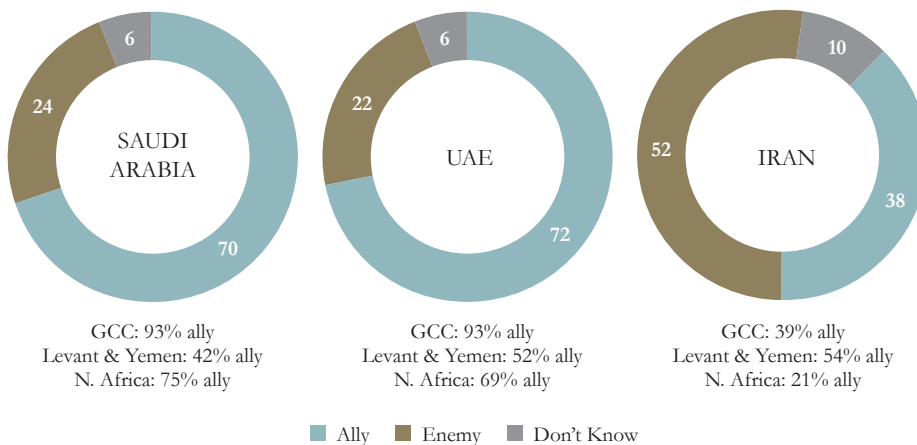


COUNTRIES WHICH PERCEIVE IRAN AS AN ALLY

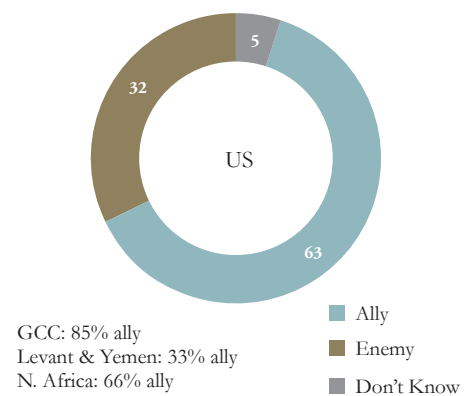


WHILE A MAJORITY OF YOUNG ARABS VIEW SAUDI ARABIA AND UAE AS ALLIES AND IRAN AS AN ENEMY, YOUNG PEOPLE IN LEVANT ARE MORE LIKELY TO CONSIDER IRAN AN ALLY.

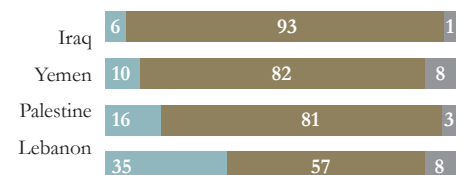
DO YOU CONSIDER [...] A STRONG ALLY, SOMEWHAT OF AN ALLY, SOMEWHAT OF AN ENEMY, OR A STRONG ENEMY OF YOUR COUNTRY?



WHILE US STANDING IN THE GCC IS STRONG, IT IS NOT IN THE LEVANT, ESPECIALLY IN IRAQ WHERE 9 IN 10 VIEW THE US AS AN ENEMY.



COUNTRIES WHICH PERCEIVE THE US AS AN ENEMY



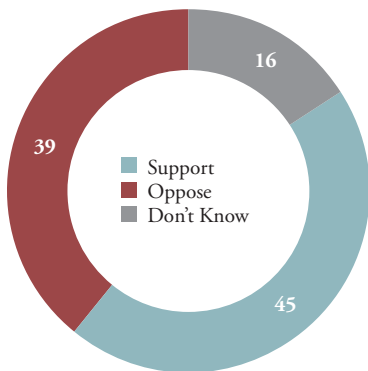
5

**YOUNG ARABS ARE DIVIDED ON THE
IRANIAN NUCLEAR DEAL AND THE
SYRIAN CONFLICT.**

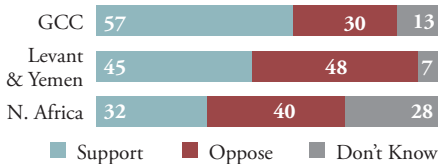
The devastating war in Syria, together with the decision by the P5+1 countries to lift international sanctions on Tehran, have left Arab youth divided with no clear view on either of the political and military situations. While 45 per cent of young Arabs support the Iranian nuclear deal, 39 per cent oppose it. The strongest support (93 per cent) is among young Omanis, whose government played a critical role in brokering the deal between Tehran and the international community.

ACROSS THE REGION, YOUNG ARABS ARE DIVIDED ON THE IRANIAN NUCLEAR DEAL; SUPPORT IS STRONGEST IN OMAN, WHICH PLAYED A SIGNIFICANT ROLE IN BROKERING THE AGREEMENT.

TO WHAT EXTENT DO YOU SUPPORT OR OPPOSE THE RECENT AGREEMENT BETWEEN IRAN AND THE INTERNATIONAL COMMUNITY ON IRAN'S NUCLEAR PROGRAMME ?



Top support country: Oman – 93% support

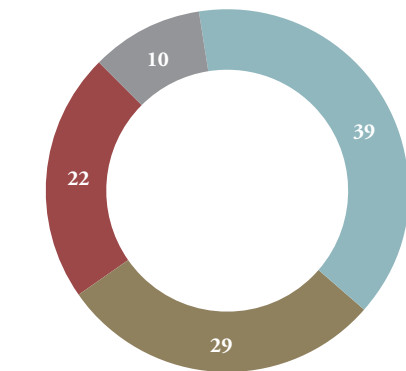


The United States recently said it would help foreign companies feel more at ease doing business in Iran following the landmark deal in July last year. The comments follow after Iranian officials claimed the country is not getting the full benefits of the deal.

There are also sharp differences of opinion among Arab youth as to whether the Syrian conflict is a proxy war, a revolution or a civil war. Overall, a plurality (39 per cent) of Arab youth view the conflict in Syria as a proxy war fought by regional and global powers, while 29 per cent view it a revolution against the Bashar Al-Assad regime and 22 per cent believe it is a civil war among Syrians.

OPINION IS DIVIDED AMONG ARAB YOUTH ON WHETHER THE SYRIAN CONFLICT IS A PROXY WAR, A REVOLUTION, OR A CIVIL WAR AMONG SYRIANS.

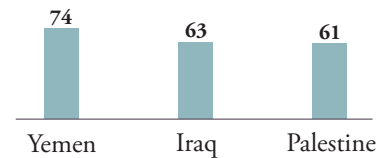
WHICH OF THE FOLLOWING IS CLOSEST TO YOUR VIEW? THE ONGOING CONFLICT IN SYRIA IS...



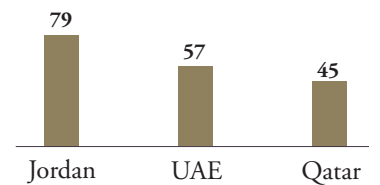
- A proxy war fought by regional and global powers
- A revolution against Bashar Al-Assad's regime
- A civil war among Syrians
- Don't Know

Syria's five-year conflict has killed more than 250,000 people, caused the world's largest refugee crisis and allowed Daesh to take control of some eastern areas of the country. While a recent ceasefire deal, brokered by the United States and Russia, has brought relative calm to the country, fighting continues to breakout.

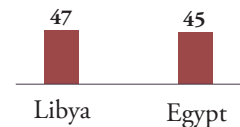
TOP "PROXY WAR"



TOP "REVOLUTION"



TOP "CIVIL WAR"





Michael Stephens

Michael Stephens is the Research Fellow for Middle East Studies, at the Royal United Services Institute (RUSI). He is also the Head of the Institute's office in Qatar. Michael has published extensively on issues of security and society in the Middle East, most recently focusing on UK policy towards the Gulf and coalition policy against Daesh.

“ The Middle East regional order is in a state of deep change, and instability. The retrenchment of US military power, and political attention toward the Middle East has opened up a space for competition between regional powers, hastening the breakdown of state structures in both the Levant and North Africa. ”

SPHERES OF INFLUENCE

The results of the 2016 ASDA'A Burson-Marsteller Arab Youth Survey reflect a decidedly mixed picture of political outlooks and trends, which clearly indicate that the Middle East region is sub-dividing into differing spheres of perception on issues of foreign policy and security.

Overall the data is revealing, but not altogether surprising. The Middle East regional order is in a state of deep change, and instability. The retrenchment of US military power, and political attention toward the Middle East has opened up a space for competition between regional powers, hastening the breakdown of state structures in both the Levant and North Africa. In the Levant, sectarian and religious affiliations have replaced loyalty to the state as the primary vectors for social and political identity. The more homogenous Gulf states, free from conflict and civil turmoil, are more fearful of Iranian influence and its status in the region as a rising power.

Indeed, youth in the GCC states show a high level of ideological cohesion and shared outlook on foreign policy issues. This is no great surprise; Riyadh's assumption of a regional leadership role to combat the growing presence of Iran has necessitated a stronger outlook on shared foreign policy priorities from its regional partners. With the exception of Oman, which largely views both the Iranian nuclear deal, and Iran's position in the region, in more sanguine terms, the youth of the GCC look to the historical US-Saudi Arabia axis as guarantors of security and prosperity.

The disparity between perceptions of Iranian enmity in the Gulf versus the more positive perceptions of Iran in Iraq and the Levant can be largely attributed to the macro-forces that are currently buffeting the region. Iraq, Lebanon and Syria are all shaken by regional instability, conflict and the rise of Daesh, all of which have heavily impacted upon the wide mosaic of communities and religious groups that live there. It is sadly the case that sectarian affiliations have begun to manifest in political choices and preferences, reflecting the deep social and political divides which have opened up in recent years.

In addition, the ruling elites of these countries possess close ties to Iran, and have sold the notion of Iranian support as being crucial to the survival of the existing regional order and of their populations. Accordingly the view of Iran as a protector, rather than as an agent of regional destabilisation, is far more prevalent. Logically, support for Saudi Arabia as a friend and ally is also still a salient feature of the Levant's politics, as the Sunnis of the region chafe at the increased presence and activity of Iranian backed non-state actors. Indeed this sentiment is likely to continue into the medium term, at least until the conflicts in the region subside, and deep sectarian and social divides begin to heal.

These divides are largely reflected by the opinion of Arab youth to the two big questions that dominate regional security; the nuclear deal with Iran, and the five year war in Syria. It is notable that in Qatar and the UAE, the strongest perception remains that the war is a revolution against the tyranny of Bashar Al-Assad, in contrast to Levantine countries who are more predisposed to see the conflict as a proxy war between regional powers, and their great power allies. Once again the social and political mosaic in the Levant affects perception. It is also interesting that a significant proportion of youth in Libya and Egypt (47 per cent and 45 per cent) – countries largely unaffected by sectarian politics, or the spillover effects of the Syrian conflict – see it as a contained civil war between Syrian parties, and are less likely to view it as an arena of regional power competition.

Despite this, the view of North Africans towards Iran in particular is extremely negative, with just 21 per cent of those surveyed believing that Iran is an ally. Additionally opinion is deeply divided over the costs and benefits of signing the nuclear deal with Tehran. Iran's relative absence from the North African region and the relatively few contact points between Maghribis and Iranians would suggest that these statistics are largely informed by stereotypes and perceptions of Iran gained through media. Nevertheless it is interesting to note that Iran's regional ambitions would be largely checked by a population that is unlikely to see great benefit in Iranian leadership, nor welcome its influence.

Lastly, no analysis is complete without considering youth attitudes to the United States, still the most powerful external actor in the region, but under the leadership of Barack Obama growing more reluctant to maintain its hegemony with each day. Worn down through years of war and failed attempts at state building, the US has attempted to pull back its influence, with dangerous consequences for the region.

“Divides are largely reflected by the opinion of Arab youth to the two big questions that dominate regional security; the nuclear deal with Iran, and the five-year war in Syria.”

Youth in Iraq, Yemen, Palestine, and Lebanon – countries which are all in their own ways deeply politically unstable, and have been impacted by the application of US military power either directly, or through US allies – understandably possess deep misgivings about the presence of the US in the region. In contrast the more prosperous, and stable nations of the GCC; with large expatriate populations of Westerners, and a youth population largely able to speak English, have more easily absorbed specific aspects of US soft power, whilst experiencing little of the downsides of the US military machine.

The decrease of US influence, the rise of Iran, and the associated strategic competition that has engulfed the region, have resulted in a widely differing set of survey results. Although in a region as large and diverse as the Arab world this can hardly be unexpected, it is clear that sub-national identities, closely associated with geographical location, colour outlooks on foreign policy questions, most notably between the Gulf and the Levant. It is a trend that looks set to continue as the region promises to change dramatically in the coming years.

6

**FIVE YEARS AFTER FIGHTING
FOR POLITICAL FREEDOM DURING
THE ARAB SPRING, TODAY MOST
YOUNG ARABS PRIORITISE
STABILITY OVER DEMOCRACY.**

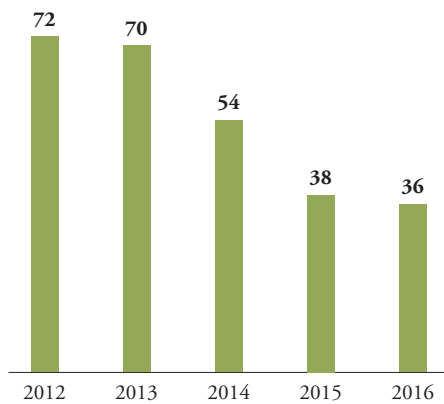
Five years after Arab youth fought for political freedom during the Arab Spring, youth across the region are calling for stability rather than democracy. Optimism that the region would be better off in the wake of the Arab Spring, which toppled four veteran leaders and led to bloody conflicts in Syria and Libya, has been steadily declining over the last five years. In 2016, just 36 per cent of young Arabs feel that the Arab world is better off following the uprisings, down from 72 per cent in 2012, at the height of unrest.

THE PERCEIVED LEGACY OF THE ARAB SPRING CONTINUES TO DETERIORATE, AND EGYPT IS THE ONLY ARAB SPRING COUNTRY THAT BELIEVES THE ARAB WORLD IS BETTER OFF BECAUSE OF IT.

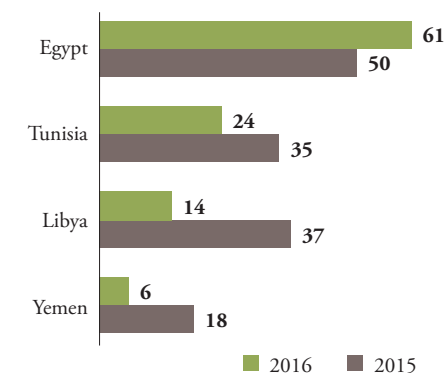
HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?

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

ALL COUNTRIES
SHOWING % AGREE



THE FOUR ARAB SPRING COUNTRIES
SHOWING % AGREE



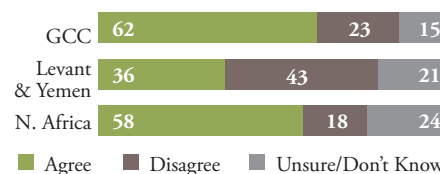
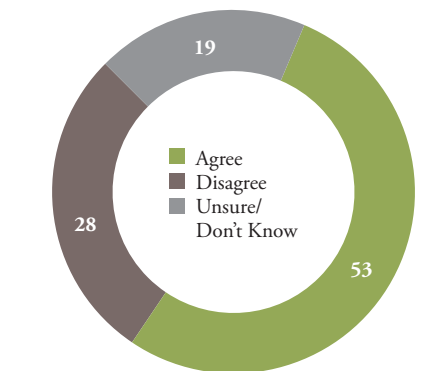
The legacy of the Arab Spring varies greatly in the four countries we surveyed that have seen significant transformational changes as a result of the uprisings. Egypt is the only Arab Spring country where a majority (61 per cent) of youth believe the Arab world is better off because of it. Meanwhile, just 6 per cent of young Yemenis, 14 per cent of young Libyans, and just a quarter (24 per cent) of Tunisian youth think the Arab world is better off.

With the current political tensions across the region, it is no surprise that the majority of young Arabs (53 per cent) agree that promoting stability in the region is more important than promoting democracy (28 per cent).

WITH THE NUMEROUS ISSUES FACING THE REGION AND THE LEGACY OF THE ARAB SPRING UNCERTAIN, YOUNG ARABS TODAY OVERWHELMINGLY FAVOUR STABILITY OVER DEMOCRACY, THOUGH YOUTH IN LEVANT & YEMEN IS DIVIDED.

HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?

“GIVEN THE CURRENT CIRCUMSTANCES IN THE MIDDLE EAST, PROMOTING STABILITY IN THE REGION IS MORE IMPORTANT THAN PROMOTING DEMOCRACY”



This is felt particularly strongly in the GCC (62 per cent stability versus 23 per cent democracy) and North African countries (58 per cent stability versus 18 per cent democracy). Meanwhile, Levant & Yemen are divided on the issue, with 36 per cent saying stability is more important than democracy versus 43 per cent who disagree with the notion.



Faisal Al Yafai

Faisal Al Yafai is chief columnist for The National newspaper. He was previously an investigative journalist for The Guardian in London and a documentary journalist for the BBC. He has reported from across the Middle East, from Eastern Europe and Africa. In his columns and for The National, he writes mainly on foreign policy, economics and international affairs. Faisal is a frequent guest on television networks such as CNN, the BBC and France 24. His book on feminism and liberalism in the modern Middle East will be published soon by IB Tauris, London. He has served as a Churchill Fellow in Lebanon and Indonesia.

“ When the results of the Survey suggest young Arabs think democracy will not work and the Arab republics should prioritise stability, I don’t read that as the youth turning their backs on democracy, or even the possibility of change. Rather, I see it as a retrenchment, as a belief that the best way to get personal autonomy and economic prosperity is to first seek stability in an ordered political system. ”

A DIFFICULT LEGACY

Five years after the French and American revolutions started, they were still not over. The revolution that created the United States burned for eight years; that which birthed the French republic lasted for ten.

Five years after the Arab Spring revolutions, young Arabs, as per the ASDA'A Burson-Marsteller Arab Youth Survey, appear unsure it was even worth it. Asked this year if they agreed or disagreed that "following the Arab Spring, I feel the Arab world is better off," just 36 per cent agreed.

Perhaps that is unsurprising. The five countries through which the Arab Spring blew – Tunisia, Egypt, Libya, Yemen and Syria – are, broadly, in a parlous state. Some, like Libya, Yemen and, of course, Syria are only getting worse. Small wonder, then, that not only has the broad feeling towards the Arab Spring deteriorated, but that in three of the Arab Spring countries surveyed (Tunisia, Libya and Yemen), the feelings of young Arabs have deteriorated in the space of just one year.

It wasn't always thus. When ASDA'A Burson-Marsteller polled young Arabs in 2010, it found a powerful desire for social change. The following year, as the Arab Spring revolutions began, a second survey found a staggering 92 per cent of Arab youth believed "living in a democracy" was their most important desire. So what happened?

In a way it is hardly surprising that belief in the potential of the Arab Spring has declined so rapidly. The legacy of the Arab Spring is at best mixed; at worst, straightforwardly negative.

Syria is the worst example: a revolution that became a civil war that then became the worst humanitarian disaster on the planet. The other four Arab Spring countries may have avoided such severe conflict, but none have reached the ambition of the initial clamour.

Small wonder then that, in a follow up question from this year's Survey, when young Arabs were asked if "promoting stability" was more important than "promoting democracy", they chose stability. Has the initial enthusiasm for democracy been so eroded?

To answer that, it is important to understand what lies behind the desire for democracy.

I tend to think that the desire for democracy is composed of three parts. A desire for a stable and ordered political system; a desire for personal autonomy – meaning the ability to live a life unencumbered by too much control from the state or society; and a desire for economic prosperity.

"My message to Egyptians, Tunisians, Libyans and Yemenis, young and old, is that if the young people of your countries do not believe that they are better off five years after the Arab Spring, that is not the fault of the young for believing. It is the fault of the political establishment for not achieving."

That may seem like quite a lot to have wrapped up in the idea of democracy, but my conversations with and reporting on young Arabs in the Middle East, and the way these young people express their desires for the future, tend to revolve around the ability to have a stable, economically prosperous life, and to be sure that nobody is going to come and take that from you. The ability to choose their own leaders is an essential part of that, but all the components are necessary.

I think what we see in this Survey is that as the potential of the Arab Spring has faded, as the countries of the Arab Spring appear to be more and more locked in intractable conflicts, as those conflicts spilled beyond the borders of individual countries, the feeling is that democracy is probably not going to work for now and that it's a good idea to go back to stability.

But stability is a political prerequisite for everything else. It lays the foundation for a successful society. So when the results of the Survey suggest young Arabs think democracy will not work and the Arab republics should prioritise stability, I don't read that as the youth turning their backs on democracy, or even the possibility of change. Rather, I see it as a retrenchment, as a belief that the best way to get personal autonomy and economic prosperity is to first seek stability in an ordered political system.

I think you see elements of that in the research. Of the four republics – Egypt, Tunisia, Libya and Yemen – that passed through the Arab Spring, Egypt went through a democratic process, found it unstable, and then refocused on stability first – and that country's youth appear best disposed towards the Arab Spring.

In Libya and Yemen, the most unstable of those four countries, it is perhaps unsurprising that positive feelings towards democracy have deteriorated and that the promise of the Arab Spring has been unfulfilled. The democratic process in both those countries has been interrupted and the result has been instability and war.

In that regard, Tunisia, which has had a broadly successful Arab Spring transition, is a bit of an outlier, but 2015 was a terrible year for the country and it faced three terrorist attacks inside its borders, which perhaps influenced the answers of young Tunisians.

Five years on, I remain optimistic about the Arab Spring, because I am optimistic about the Arab world. To me, the Arab Spring was a moment when Arab youth sought to take back their personal agency from state and military institutions. Even after five years of reporting and writing on the revolutions, I still see it as a historic moment, when agency was returned to the Arab body politic. That the promise and ambition of the Arab Spring has not been fulfilled yet does not mean, I hope, that it will not be fulfilled in time.

But there is an important distinction to be drawn between the Arab Spring revolutions and the aftermath of the Arab Spring.

The revolutions were not a choice: they were a spontaneous expression of dissatisfaction. But the aftermath is a choice. Making sure what comes after the revolutions fulfils the ambitions and desires of the majority of young Arabs is a choice and the responsibility of all elements of society. It will require the governments and the people of the republics to work together.

My message to Egyptians, Tunisians, Libyans and Yemenis, young and old, is that if the young people of your countries do not believe that they are better off five years after the Arab Spring, that is not the fault of the young for believing. It is the fault of the political establishment for not achieving.

7

**ARAB YOUTH WANT THEIR
LEADERS TO DO MORE TO IMPROVE
THE PERSONAL FREEDOM AND
HUMAN RIGHTS OF CITIZENS,
PARTICULARLY WOMEN.**

Arab youth are prioritising personal freedom and rights of their citizens, especially those of women, with two in three (67 per cent) calling for their leaders to do more to improve their personal freedom and human rights.

The belief that more should be done on human rights extends across the region – 74 per cent agree in the GCC countries, 57 per cent in the Levant & Yemen, and 68 per cent in North Africa.

When asked to think specifically about the personal freedom and rights of women, two in three Arab youth (67 per cent) also agreed regional leaders should do more to improve them while just 17 per cent disagree.

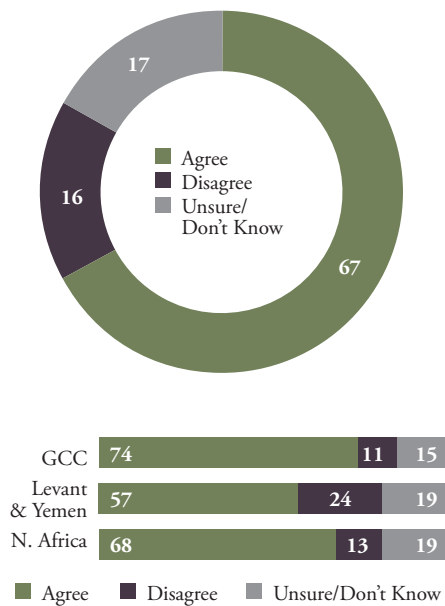
The strong consensus extends across gender lines, with 68 per cent of young Arab women and 66 per cent of young Arab men agreeing that more should be done to improve the rights of women.

The level of agreement is strongest in the GCC (75 per cent agree), and specifically in Saudi Arabia (90 per cent agree), Oman (87 per cent), Kuwait (80 per cent), and the UAE (76 per cent). Outside the GCC, the highest level of agreement is in Yemen (87 per cent agree) and Egypt (80 per cent).

ARAB YOUTH WANT THEIR LEADERS TO DO MORE TO IMPROVE THEIR PERSONAL FREEDOM AND HUMAN RIGHTS.

HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?

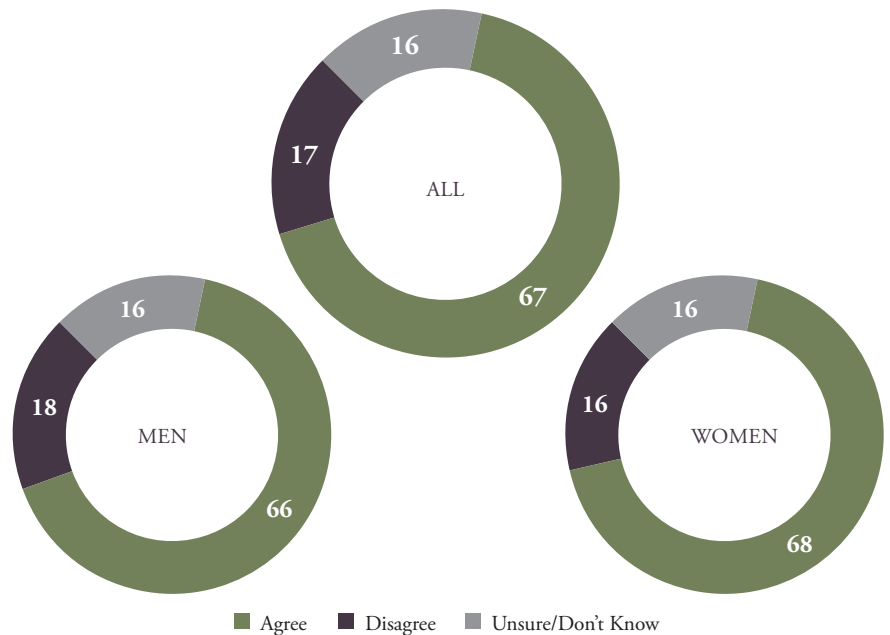
“THE ARAB LEADERS SHOULD DO MORE TO IMPROVE THE PERSONAL FREEDOM AND HUMAN RIGHTS OF THEIR PEOPLE”



REGARDLESS OF GENDER, TWO IN THREE YOUNG ARABS BELIEVE THEIR LEADERS SHOULD DO MORE TO ADVANCE THE RIGHTS AND PERSONAL FREEDOM OF WOMEN.

HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?

“THE ARAB LEADERS SHOULD DO MORE TO IMPROVE THE PERSONAL FREEDOM AND HUMAN RIGHTS OF WOMEN”

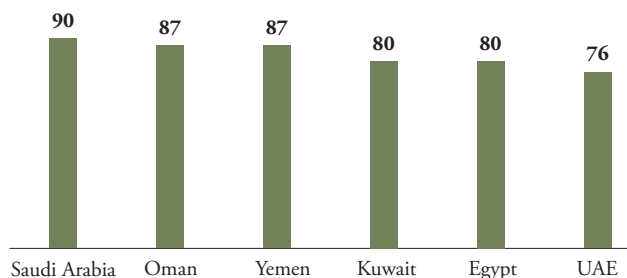


THE DESIRE FOR ARAB LEADERS TO DO MORE ON WOMEN'S RIGHTS AND FREEDOM IS STRONG ACROSS DIFFERENT PARTS OF THE REGION AND HIGHEST IN SAUDI ARABIA.

HOW STRONGLY DO YOU AGREE OR DISAGREE WITH THE STATEMENT?

“THE ARAB LEADERS SHOULD DO MORE TO IMPROVE THE PERSONAL FREEDOM AND HUMAN RIGHTS OF WOMEN”

SHOWING TOP 6 COUNTRIES WITH THE HIGHEST % AGREE





Clare Woodcraft

Clare Woodcraft is the CEO of Emirates Foundation, the national foundation of the UAE tasked with driving the nation's vision of supporting youth development. Clare has more than 20 years of experience working in the field of sustainable development in the Middle East and Africa as a development practitioner, a journalist and a corporate executive specialising in sustainability, social investment and reputation management.

“ The MENA region still has the lowest level of female labour force participation in the world but there is hope. Research shows that young Arab women can be inspired by just one person – one person who is able to demonstrate that women can break down barriers and taboos. ”

THE TIDE IS TURNING

It is shocking that in the 21st century we still need to justify why women should be given equal opportunities in the workforce and public sphere, given they comprise 50 per cent of the world's population. While we see progress around women in senior governance and decision-making roles through, for example, legislation in the UAE and quotas in countries such as Norway, the targets are still modest. A campaign in the UK to get women on FTSE boards targets just 33 per cent rather than 50 per cent. Meanwhile, feminism has gone out of fashion even though it just means equal rights for men and women.

Women in MENA, however, are leading the charge and becoming as vocal and active as their international counterparts in calling for more empowerment, equal opportunities, pay and voice. They are also increasingly taking up senior leadership roles and providing the much needed role models that can be game changing for young women across the Arab world.

Already we see prominent Arab women in senior government roles. From Sheikha Lubna bin Khalid Al Qasimi, the UAE Minister of Tolerance, to Noura Al Kaabi, Minister of State for Federal National Council Affairs, and the 22-year old Minister of State for Youth Affairs, Shamma Suhail Al Mazrui, the UAE leads in bringing women into public policy realms.

The philanthropic sector has also seen the rise of professional women making an impact. Maytha Al Habsi, Deputy CEO of Emirates Foundation, is a leader in social investment creating and scaling two of our most successful initiatives, Sanid and Takatof. Sheikha Shamma Bint Sultan Bin Khalifa Al Nahyan is championing financial literacy and also actively calling for more women on boards.

In the broader region, Princess Banderi Bint Abdulrahman Al Faisal leads the Saudi King Khalid Foundation's excellent work on human capital. Women run two of Egypt's leading foundations: Nora Selim, the Executive Director of Sawiris Foundation, and Rania Hammad, the Managing Director of Mansour Foundation.

“Women in MENA are consistently defying the stereotypes, proving their worth in the male dominated aspects of the labour force and becoming a force to be reckoned with in terms of leadership.”

The private sector has equally powerful role models. Muna Easa Al Gurg, the Director of Retail for the Easa Saleh Al Gurg Group, is a prominent voice advocating for more women in business and is successful in her own right in maximising the commercial success of a family firm.

We know from research that what young Arab women want are role models. The work of the ASDA'A Burson-Marsteller Arab Youth Survey shows that youth – male and female – support the empowerment and enfranchisement of women. The MENA region still has the lowest level of female labour force participation in the world but there is hope. Research shows that young Arab women can be inspired by just one person – one person who is able to demonstrate that women can break down barriers and taboos. With more effort around mentoring and access to opportunities in the private sector where their talent is nurtured, it is entirely possible that there will come a tipping point in coming years for Arab women accessing the public sphere.

Across the region, women are using enterprise as a force for economic prosperity, empowerment and access. Glowork, a Saudi-based social enterprise, has seen the placement of 27,000 women in jobs in the private sector in Saudi Arabia since its establishment just five years ago.

Women are increasingly interested in technical or STEM roles, the area where future opportunities are likely to flourish.

Women in MENA are consistently defying the stereotypes, proving their worth in the male dominated aspects of the labour force and becoming a force to be reckoned with in terms of leadership. The UAE's leadership is aware of this: At the 2013 UAE Government Summit Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the United Arab Emirates and Ruler of Dubai, emphasised: “In the UAE, 70 per cent of graduates are women, 65 per cent of government employees are women, and 30 per cent are leaders already. Women work hard and achieve more, they have a brighter future. We have plans for women, and the men should watch out, for the women will take their positions.”

Youth intrinsically understand this and simply don't accept that women should be excluded. Youth are the solution to many aspects of sustainability and particularly gender equality. Given the region's demographics, herein lies a potentially powerful dividend. The tide is turning. The voice of youth can accelerate change and allow the Arab world to take its rightful place on the world stage as a rich, diverse, innovative and inspiring community. Riding on the back of the digital revolution and their intrinsic sense of social purpose, equity and sustainability, progressive, open-minded and vocal youth are surely the best way to ensure that female talent in the Arab world is nurtured and that social and economic policies leverage this enormous potential.

8

**THE UAE IS VIEWED AS A MODEL
COUNTRY THAT IS ECONOMICALLY
SECURE, AND IS THE MOST
FAVOURERD NATION TO LIVE IN
AND SET UP A BUSINESS.**

Arab youth believe the UAE is a safe and secure country with a thriving economy that offers good job opportunities and as such is the country most would like to live in and their own country to be like. When asked to think about the country they would most like to live in, nearly one in four (22 per cent) of young Arabs cite the UAE and just as many say it is the country they would most like their own to emulate (23 per cent). On both questions, the UAE is followed by the United States, with 15 per cent saying they would like to live there and 19 per cent saying they want their country to be more like it.

To help better understand why for the fifth year running, the UAE maintains its popularity among young Arabs, the Survey provided respondents a series of positive and negative phrases and asked them to choose the ones they associate with the UAE most.

FOR THE FIFTH YEAR RUNNING, YOUNG ARABS VIEW THE UAE AS THE TOP COUNTRY TO LIVE IN.

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

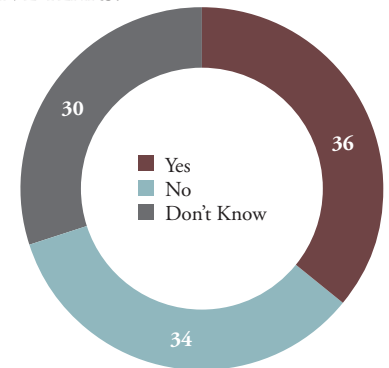
The top associations with the UAE revolve around safety, security and economic opportunities with “safe and secure” the most associated phrase with 36 per cent of youth, followed by “growing economy”, a “wide range of work opportunities” and “generous salary packages” (all 29 per cent).

This year, for the first time, the Survey also asked potential entrepreneurs – young Arabs who said they intend to start their business in the next five years – in which Arab country they would like to set up their business. The UAE ranked as the most preferred country with one in four (24 per cent) citing it as the top business destination in the Arab world, followed by Saudi Arabia (18 per cent) and Qatar (13 per cent).

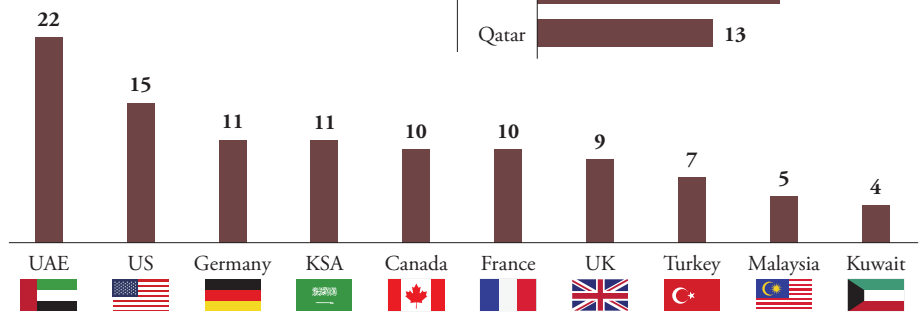
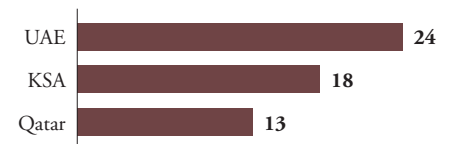
The UAE’s popularity is likely a reflection of its status as a model country and regional political and economic safe haven. The Gulf state has developed a global reputation for its robust and diversified economy, which encourages a “can do” attitude among its residents and is respectful of religious and cultural diversity.

AMONG POTENTIAL ENTREPRENEURS, THE UAE IS ALSO SEEN AS THE TOP NATION IN THE ARAB WORLD TO START A BUSINESS.

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

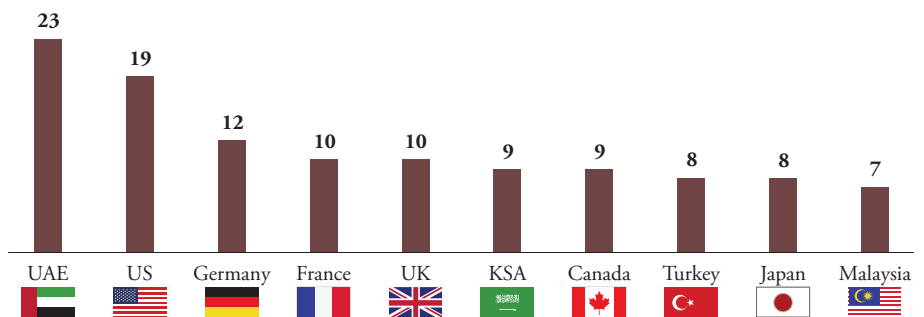


IF INTENDS TO START: IN WHICH ARAB COUNTRY WOULD YOU LIKE TO SET UP YOUR BUSINESS?



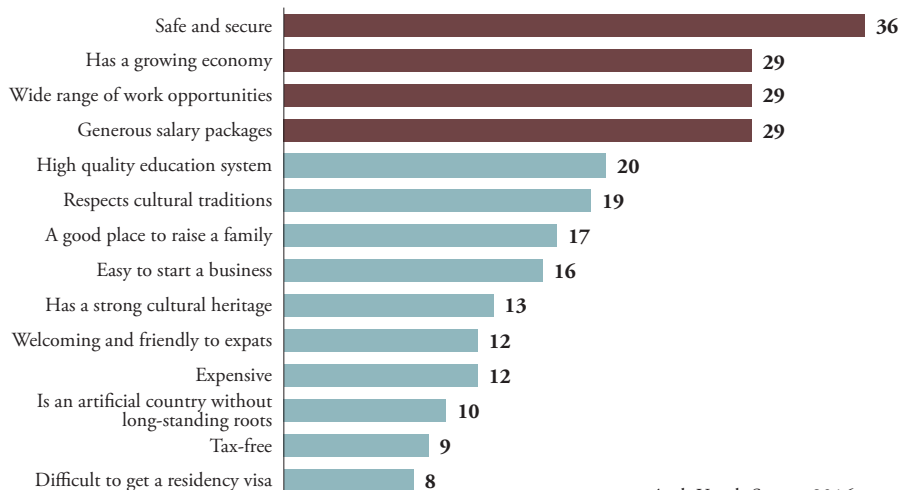
ARAB YOUTH ALSO CONTINUE TO VIEW THE UAE AS THE TOP COUNTRY FOR THEIR OWN NATIONS TO EMULATE FOR THE FIFTH YEAR.

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



THE STRENGTH OF THE UAE’S IMAGE AMONG ARAB YOUTH STEMS PRIMARILY FROM THE PERCEPTION OF THE UAE AS A SAFE AND SECURE COUNTRY THAT OFFERS ECONOMIC OPPORTUNITIES.

THINKING SPECIFICALLY ABOUT THE UNITED ARAB EMIRATES, WHICH OF THE FOLLOWING PHRASES, IF ANY, DO YOU ASSOCIATE MOST STRONGLY WITH THE UAE? PLEASE SELECT ALL UP TO THREE PHRASES.





Afshin Molavi

Afshin Molavi is a senior fellow at the Foreign Policy Institute of the Johns Hopkins University School of Advanced International Studies. Afshin is an author and expert on global geo-political risk and geo-economics, particularly the Middle East and Asia. He is also a senior fellow at the New America Foundation, where he is co-director of the World Economy Roundtable, an ambitious exercise to re-map the global economy in the wake of the 2008 economic crisis. In 2005, he was selected by the World Economic Forum in Davos as a Young Global Leader.

“ Clearly, the UAE has emerged as a lodestar for young Arabs and while the UAE has given them an opportunity, it has also benefited from the combined efforts of the most talented, cosmopolitan, hard-working men and women of their generation. ”

A BEACON FOR THE 'BURNED GENERATION'

"Immigration," quipped the American author and TV personality Jack Paar, "is the sincerest form of flattery". It's a nice line, but it doesn't tell the whole truth. After all, the choice to migrate somewhere depends on many factors, including proximity, limited choices, family ties, and dozens of other reasons.

"The word is out that the UAE will offer you an opportunity, and, in the end, that's all young people want anywhere in the world."

The 2016 ASDA'A Burson-Marsteller Arab Youth Survey offers a cleaner example of Paar's flattery because it simply asked young Arabs an aspirational question: "If you could live anywhere in the world, where would you live?" For the fifth consecutive year, young Arabs gave the same answer – the United Arab Emirates. The United States and Germany are a distant second and third, and only two other Arab countries cracked the top ten.

Over the years, I have been struck by this consistent result. Across the Arab world, over the past several decades, leaders have failed to deliver the goods for their citizens, especially young people. Of these 'goods' the one most prized by young Arabs is simply opportunity: the opportunity to reach their potential in a secure, safe environment, free of corruption, and open to innovation and creativity. This opportunity offers the dignity of succeeding or failing on your terms, not because of wasta (connections) or lack thereof, or any other factor.

When the Tunisian vegetable vendor Mohammad Bouazizi set himself on fire in December 2010 to protest a predatory government that had taken away his means of making a living – his opportunity – he likely had no idea that he would ignite uprisings across the Arab world; uprising driven by a "burned generation" of Arab youth fed up with corruption, dictatorship, and lack of opportunity. The fact that, since 2012, young Arabs have chosen the UAE as the place they would most like to live and the country they would most like to emulate, begs further exploration.

As a regular traveler to the UAE (my first visit was in 1993), I have watched the country grow from modestly successful regional entrepot – Dubai-driven – and geopolitical player – Abu Dhabi-driven – to one of the most important global hubs and regional political actors today. The story of the rise of the UAE from a loosely formed union of struggling emirates in 1971 to global player is one of the great nation-building stories of our era, one that should merit careful and sustained study.

The UAE owes its rise to a number of factors but, in my view, they come down to two essential ones: visionary leadership and the people that live and work in the seven emirates. It's hardly a secret that UAE leaders have been delivering the goods for their people and residents in terms of a growing economy, women's empowerment, access to education and opportunity, efficient delivery of government services, and much more. Scan the rapidly proliferating list of indexes from the Global Competitiveness Index to the Global Innovation Index to the World Happiness report, and the UAE consistently ranks at or near the top.

The leadership already gets its fair share of headlines. It's time to explore the other key factor for the UAE's rise: the people, including the millions of talented and hard-working expatriates who choose to make it their home – the doctors and engineers, the artists and professors, the labourers and the services professionals, the investment bankers and real estate developers, and others who came from more than 150 countries to work every day to deliver, build, innovate, and create.

A sub-set of this group of talented expatriates are the young Arab professionals. A book should be written about these people, culturally at home in the Arab world, but globalised and cosmopolitan and highly capable in their fields. They came to the UAE because their own homelands offered them little in the way of hope or opportunity, or they simply wanted to challenge themselves among the best of their generation who were flocking to Dubai and Abu Dhabi.

Consider someone like Yasar Jarrar, who is today one of the Arab world's most highly respected government strategy professionals. He has been a partner at two of the world's leading firms, PWC and Bain, and co-chairs the World Economic Forum Global Agenda Council on the future of Government. He came to Dubai in the year 2000 from the UK, where he studied for his PhD after leaving Jordan, to interview for a job, and was struck by the Emirati official who interviewed him. "Don't come here to work with us," the official said. "Come here to dream with us." He stayed, worked in the Dubai Executive Office, and now leads his own firm advising corporations and governments.

It's stories like these that explain why young Arabs consistently vote for the UAE as their number one choice of places to live. The word is out that the UAE will offer you an opportunity, and, in the end, that's all young people want anywhere in the world.

There is nothing more tragic than stifled potential, of watching young, talented, hard-working Arabs unable to succeed in their homelands, lining up outside Western embassies, dreaming of a visa, an exit, a way out and up. Clearly, the UAE has emerged as a lodestar for young Arabs and while the UAE has given them an opportunity, it has also benefited from the combined efforts of the most talented, cosmopolitan, hard-working men and women of their generation.

9

ARAB YOUTH ARE INCREASINGLY CONCERNED ABOUT FALLING OIL PRICES, BUT MOST STILL BELIEVE THEY ARE ENTITLED TO SUBSIDISED ENERGY.

Though Arab youth are concerned about the impact of declining oil prices, they still believe they are entitled to subsidised energy costs. Two in three young Arabs (66 per cent) say they are concerned about falling oil prices, up from 52 per cent in 2015. Consistent with 2015, the level of concern is significantly higher in the OPEC countries (80 per cent) than in the non-OPEC Arab countries (54 per cent).

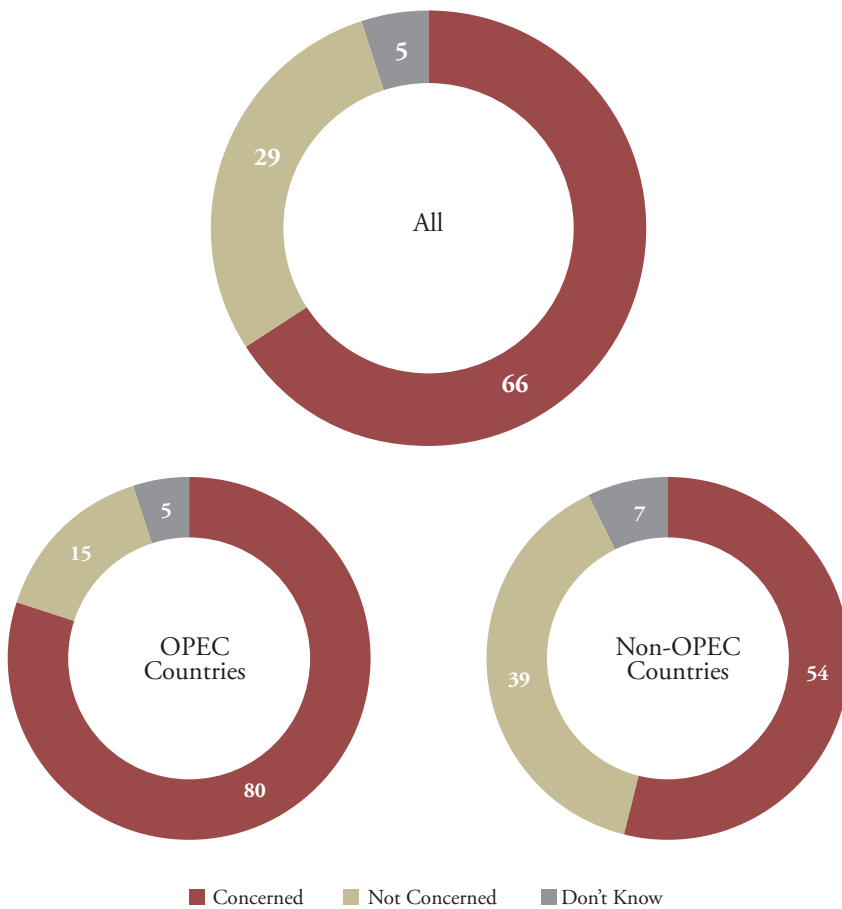
OPEC countries in the Survey include Algeria, Iraq, Kuwait, Libya, Qatar, Saudi Arabia and the UAE.

Rapidly falling energy prices have prompted several regional governments to review their subsidies programmes. Jordan and Morocco have both removed energy subsidies in recent years, and countries such as the UAE, Saudi Arabia, Kuwait, Qatar and Oman have followed suit.

In spite of the impact of falling energy prices on their nation's economy, nearly four in five Arab youth (78 per cent) still believe they are entitled to subsidised energy costs. If their government were to stop subsidising energy, nearly half (49 per cent) of young Arab nationals believe the subsidies should be stopped only for expats and kept in place for nationals, compared to 37 per cent who say the subsidies should be removed for both nationals and expats.

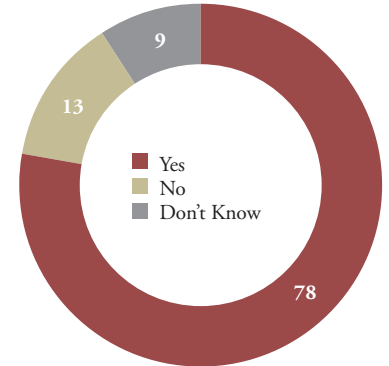
CONCERN ABOUT FALLING OIL PRICES HAS RISEN SIGNIFICANTLY OVER THE PAST YEAR AND IS PARTICULARLY HIGH AMONG YOUNG ARABS LIVING IN THE OPEC MEMBER STATES.

HOW CONCERNED ARE YOU ABOUT FALLING ENERGY PRICES?



NEARLY FOUR IN FIVE BELIEVE THEIR GOVERNMENT SHOULD CONTINUE ENERGY SUBSIDIES – BUT IF THE SUBSIDIES WERE TO BE STOPPED, MANY BELIEVE THE SUBSIDIES SHOULD BE REMOVED FOR EXPATS ONLY.

DO YOU THINK ENERGY, ELECTRICITY AND TRANSPORT FUEL SUCH AS GASOLINE AND DIESEL SHOULD BE SUBSIDISED BY YOUR GOVERNMENT?



IF YOUR GOVERNMENT WERE TO STOP SUBSIDISING ENERGY, ELECTRICITY AND TRANSPORT FUEL, DO YOU THINK THE SUBSIDIES SHOULD BE REMOVED FOR...

49%
Only for expatriates

37%
Both for nationals and expatriates



Dr. Christian Koch

*Dr. Christian Koch is the Director of the Gulf Research Center Foundation in Geneva, Switzerland. Dr. Koch's work at the GRC involves analysis of the GCC states on pertinent foreign and security issues with a focus on GCC-EU Relations. He is particularly interested in better understanding the dynamics driving regional security issues in the critical Gulf region and promoting aspects of co-operative security among regional and international actors. In this context, he co-authored *Establishing a Regional Conference on Security and Cooperation in the Gulf Region*, in 2015. Dr Koch received his PhD from the University of Erlangen-Nürnberg, Germany and also studied at the American University in Washington, DC and the University of South Carolina.*

“

Given the current volatility that characterises much of the present-day Middle East, one might see a new bargain struck between the governors and the governed. As the UAE commentator Sultan al-Qassimi recently stated in an article for the Middle East Institute: ‘Taxation in exchange for ensuring the security of citizens in an increasingly dangerous neighborhood might be the new accepted social contract.’

”

A CHANGING SOCIAL CONTRACT

The dramatic decline in oil income since the beginning of 2015 has led to a wide-ranging debate about the economic future and viability of the oil-producing states, with some pundits even predicting the end of the so-called rentier state. For the Middle East as a whole, the economic prospects have dimmed significantly. While the six GCC states have seen their oil revenue decline by \$360 billion in 2015 alone, resulting in mounting budget deficits after a decade of fiscal surpluses, other Middle Eastern states are mired in conflict and widespread instability that have left their economies devastated and their governments unable to provide basic services. All of this is happening in a region where more than half of the population is under the age of 25.

“The GCC states have been in a privileged position in the past, but under the new generation of rulers, the realisation is growing that far-reaching economic and political reforms are essential if these countries want to remain stable and prosperous. In this sense, the end of the rentier state may, indeed, be nigh.”

In a period of declining economic fortunes, it is clear that something will have to give. In Saudi Arabia alone, government expenditure in the past 10 years has risen from \$53 billion to \$160 billion, a 300 per cent increase. And, while the average GCC budget surplus for 2008 to 2012 came to 10.3 per cent, in 2015 those same countries were faced with an average fiscal deficit of 13 per cent. With the overall assessment being that oil prices will not recover significantly at least over the next few years, it is clear that unrestrained government spending simply cannot be maintained.

Governments have already started to react by introducing subsidy cuts in water and electricity, as well as adjusting petrol prices to reflect better its real costs. In addition, a number of tax increases have been put forward for consideration and all GCC states have agreed to introduce a 5 per cent value-added tax (VAT) by 2018. Economic diversification projects, seen as essential to curb the rising problem of national youth unemployment, have taken on a new sense of urgency.

What makes the current developments even more interesting is that governments are being forced to undertake many of these measures at the same time that the first wave of youth is coming of age in terms of the economic, social and political demands they are placing on the existing governing system. Today's youth in the Middle East are better educated, better connected through all of the tools of information technology, and more aware of the developments around them than ever before. Youth in Saudi Arabia, for example, are the most active per capita users of Twitter and have the highest per capita consumption of YouTube videos.

Throughout the Middle East, social media has emerged as a replacement for the lack of public space. This is not a complacent and subservient youth that feels constrained by the governing practices of the past. Rather, it is a youth that actively seeks a broader and deeper role for itself in shaping its own environment and the societies in which they live.

Governments will have to adjust to the fact that today's youth seek not only economic but also political opportunities. In this context, the youth see the role of government changing. Whereas in the past, people were ready to trade political participation for their economic well-being, the equation has shifted to government being seen as providing the framework under which the population can prosper. This includes the maintenance of entitlements – 78 per cent of those interviewed for the 2016 ASDA'A Burson-Marsteller Arab Youth Survey expect energy subsidies to continue. Given the resources at their disposal, governments are still very much seen as having a duty to ensure their society's wealth and prosperity.

In the GCC states, the debate is now one of active citizenship in which people genuinely contribute to the development of their society. This is not to suggest that the youth are ready to challenge and overturn the system. Given the current volatility that characterises much of the present-day Middle East, one might see a new bargain struck between the governors and the governed. As the UAE commentator Sultan al-Qassimi recently stated in an article for the Middle East Institute: “Taxation in exchange for ensuring the security of citizens in an increasingly dangerous neighborhood might be the new accepted social contract.”

That new social contract would still be a short-term fix, however. What governments really need to do is recognise that the region's youth represent a tremendous opportunity, who should be fully integrated in the reform process that all states in the region need to undertake. The GCC states have been in a privileged position in the past, but under the new generation of rulers, the realisation is growing that far-reaching economic and political reforms are essential if these countries want to remain stable and prosperous. In this sense, the end of the rentier state may, indeed, be nigh.

10

**MORE YOUNG ARABS GET THEIR
DAILY NEWS ONLINE THAN
FROM TV OR PRINT MEDIA.**

Social media and the internet are changing the way Arab youth are accessing and consuming their news. While 32 per cent say they get their daily news online, 29 per cent say they watch TV news and just 7 per cent read newspapers daily (down from 13 per cent in 2015).

ON A DAILY BASIS, MORE YOUNG ARABS GET THEIR NEWS ONLINE THAN FROM TV OR PRINT MEDIA.



32%
read news online daily



29%
watch TV news channels daily



7%
read newspapers daily

In spite of the growing use of online media, television remains king of total media consumption with 63 per cent of young Arabs saying they get their news from TV (up from 60 per cent the previous year). The overall use of online news sources has grown from 40 per cent to 45 per cent, with social media up from 25 per cent to 32 per cent.

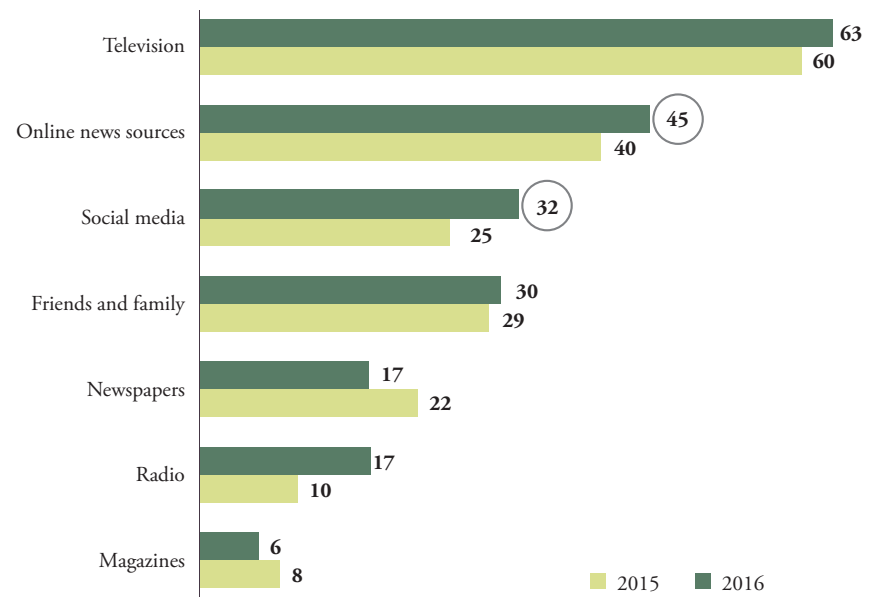
Today, just 17 per cent of Arab youth get their news from newspapers, down from 62 per cent in 2011.

WhatsApp, the instant messaging service owned by Facebook, is the most popular social media platform. Two in three young Arabs (62 per cent) use WhatsApp on a daily basis followed by Facebook (55 per cent), YouTube (33 per cent), Twitter (28 per cent) and Instagram (28 per cent).

The growing role of social media as a news platform is also apparent, with 52 per cent saying they use Facebook to share interesting news articles they read, up from 41 per cent last year.

OVERALL, TV STILL HAS THE LARGEST NEWS REACH AMONG YOUNG ARABS, BUT ONLINE AND SOCIAL MEDIA CONTINUE CLOSING THE GAP, PRIMARILY AT THE EXPENSE OF PRINT MEDIA.

WHERE DO YOU GET YOUR NEWS?



WHATSAPP IS THE NUMBER ONE SOCIAL PLATFORM USED ON A DAILY BASIS, WHILE MORE THAN HALF SHARE INTERESTING NEWS ARTICLES ON FACEBOOK.

YOUNG ARABS USE ON A DAILY BASIS...

WHATSAPP



62%

FACEBOOK



55%

YOUTUBE



33%

TWITTER



28%

INSTAGRAM



28%

52% say they use Facebook to share interesting news articles they read, up from 41% in 2015





Damian Radcliffe

Damian Radcliffe is the Carolyn S. Chambers Professor in Journalism at the University of Oregon's School of Journalism and Communication; an Honorary Research Fellow at Cardiff University's School of Journalism, Media, and Culture Studies; and a Fellow of the Royal Society for the Encouragement of Arts, Manufacturers, and Commerce. He worked for Qatar's Ministry of Information and Communications Technology (ictQATAR) from 2012 until 2014 and he has written about the Middle East for the BBC, Huffington Post, MediaShift, Northwestern University in Qatar, Reuters Institute for the Study of Journalism at Oxford University, Your Middle East and others.

“ Many young people are on social networks for several hours a day, and these channels can dominate – and massively influence – their online experience. For some audiences, social media is the primary means by which news and information is both discovered and distributed; a trait which is only going to become more prevalent. ”

THE AGE OF SOCIAL

For brands, media companies and governments seeking to engage with Arab Youth, social media has never been more important. Over the past eight years the ASDA'A Burson-Marsteller Arab Youth Survey has charted the rise of these communication channels and the pace of adoption – often at the expense of older, more established, media platforms – is nothing short of remarkable.

Back in 2011, for example, 79 per cent of Arab youth reported that they got their news from television. Five years later, that figure has dropped to 63 per cent.

That statistic may make some television executives sweat, but it's nothing compared to the palpitations newspaper publishers will be experiencing. Among the Middle East's large youth population, the market for printed news has plummeted in five years. Today, just 17 per cent of young Arabs aged 18-24 now use newspapers as a source for news; on a par with radio and some way behind family and friends (30 per cent), social media (32 per cent), online news channels (45 per cent) and the aforementioned television (63 per cent).

“Among the Middle East’s large youth population, the market for printed news has plummeted in five years. Today, just 17 per cent of young Arabs aged 18-24 now use newspapers as a source for news, down from 62 per cent in 2011.”

It's a far cry from 2011, when nearly two-thirds of Arab youth (62 per cent) claimed that they used newspapers as part of their news media consumption. Whichever way you look at it, this decline – from 62 per cent to 17 per cent in just five years – represents a phenomenal loss of audience.

Across the globe, news producers are grappling with how to develop the right business models for the internet age. A key challenge is finding the revenue streams to make digital pay, whilst at the same time recognising that many users chose to consume news online.

When it comes to daily news interactions, rather than overall news consumption, the figures are even more stark. In the Arab world, dedicated TV news channels have now fallen behind online outlets among daily news audiences. Nearly a third (32 per cent) of young Arabs read the news online each day, compared to 29 per cent who watch TV news channels – and just 7 per cent who read newspapers.

This preference to digest news digitally – and often on the move – is only likely to increase as smartphones become increasingly affordable. The GSMA, a trade body for the global mobile industry, anticipates that the number of smartphone connections in the region will grow by 117 million to 327 million by the end of the decade.

Alongside accessing news online, significant news audiences are also using digital channels to share and discuss what they're reading too. More than half (52 per cent) of Arab youth share stories with their friends on Facebook, up 11 per cent in the past year, mirroring the tendency for “social sharing” and “social news” that we have seen in other markets.

Social media, of course, isn't just used for news. Social networkers use these services for a wide range of activities including making and interacting with friends, gaming and eCommerce. More than half of young Arabs use WhatsApp (62 per cent) and Facebook (55 per cent) on a daily basis; whilst a third watch videos on YouTube (33 per cent), and just over a quarter (28 per cent) can be found on Twitter and Instagram.

This reach is significant, and a stark reminder for content creators, governments and businesses that, if they want to engage with young people in the Arab world, they need to prioritise social.

Each of these social networks has different characteristics and this represents both a challenge, and an opportunity for anyone who wants to reach Arab youth online. Given the large numbers of 18-24 year olds on social media, the opportunity is obvious. This is where your audience is. The challenge is that squirting out the same material in different places will seldom resonate with your target group. Instead, efforts need to be tailored to take advantage of the unique benefits of each channel.

This isn't easy, and it is proving to be a steep learning curve for many organisations, not least because online behaviours and platforms continue to rapidly evolve. But, at the same time, it's clear that social media is far too important to ignore. Many young people are on social networks for several hours a day, and these channels can dominate – and massively influence – their online experience. For some audiences, social media is the primary means by which news and information is both discovered and distributed; a trait which is only going to become more prevalent.

Facebook, for example, which already owns WhatsApp and Instagram, is currently rolling out innovations – such as 360 degree video and “Instant Articles”, whereby mobile audiences can read content from publishers without ever having to leave the Facebook app, in a bid to increase time spent within their service. Other networks are following suit, as these online gatekeepers seek to find further ways to keep audiences within their own walled garden.

As social networks develop further links with publishers, government entities and other media providers, their influence – and importance – is only going to grow.

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 provides services to governments, multinational 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, design services and event management.

asdaabm.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 DC, New York, London, Seattle, Los Angeles, Dubai, 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



WPP is the world's largest communications services group with billings of US\$73 billion and revenues of US\$19 billion. Through its operating companies, the group provides a comprehensive range of advertising and marketing services including advertising & media investment management; data investment management; public relations & public affairs; branding & identity; healthcare communications; direct, digital, promotion & relationship marketing and specialist communications. The company employs nearly 190,000 people (including associates and investments) in over 3,000 offices across 112 countries.

wpp.com



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	Active Twitter users	Social media penetration (%) ⁹
GCC									
SAUDI ARABIA	31	1,681.00	45	29.5	21.6	70	12	2.4 million	35
UAE	9.58	641.9	25	10	8.81	92	6.3	401,000	68
QATAR	2.3	324.2	50	1.3	2.01	91	1.7	74,400	56
KUWAIT	4	288.8	50	19.4	3.2	80	1.9	225,000	49
OMAN	4.37	171.7	46	18.8	2.9	66.4	1.2	38,800	27
BAHRAIN	1.4	64.9	13	28	1.3	92	0.7	64,300	42
NORTH AFRICA									
EGYPT	93.38	996	NA	42	48.3	51.7	27	519,000	23
ALGERIA	40.38	570.6	30	20	11	27.2	11	45,100	18
MOROCCO	34.81	274.5	NA	20.2	20.2	58	10	82,300	22
TUNISIA	11.38	127.2	NA	31.8	5.4	47.5	5.2	33,500	42
LIBYA	6.3	91.87	80	48.9	2.4	38	2.4	14,400	30
LEVANT & OTHER									
IRAQ	34.54	531.4	65	34.6	11	29	11	50,000	23
LEBANON	5.99	83.86	NA	20.7	3.33	55.6	2.6	111,000	48
JORDAN	7.75	82.99	NA	28.8	5.7	73.5	4.1	88,800	48
PALESTINE	4.8	6.9	NA	25.3	1.8	37.5	1.8	36,800	33
YEMEN	27.48	75.52	25	29.9	6.02	21.9	1.7	4,850	6

Population
GDP-PPP
Contribution of oil to GDP
Youth unemployment
Internet users
Internet penetration
Facebook users
Facebook penetration of population
Total social media penetration
Twitter users

worldpopulationreview.com; UN; Saudi CDSI; Oman Ministry of Manpower
IME, World Factbook, Trading Economics
World Factbook
World Bank, ILO, Trading Economics
Internetworldstats.com, Social Media Today; Saudi Ministry of Communications & IT; NCSI Oman
Internetworldstats.com
arabsocialmediareport.com
arabsocialmediareport.com
statista.com
Mohammed Bin Rashid School of Government, Arab Social Media Report