

# A CALL FOR REFORM

11TH ANNUAL ASDA'A BCW ARAB YOUTH SURVEY 2019

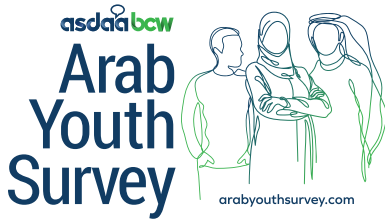
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The Arab Youth Survey 2019  
is dedicated to the Arab world's  
200 million youth.

Special thanks to:

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

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# A CALL FOR REFORM

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

Published in 2019 by ASDA'A BCW

This White Paper can be obtained from  
the ASDA'A BCW Arab Youth Survey  
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# CONTENTS

<b>INTRODUCTION</b> 04 What is the Arab Youth Survey? Why we do it? <b>Sunil John</b>	<b>METHODOLOGY</b> 05 PSB conducted 3,300 face-to-face interviews in 15 Arab countries/territories	<b>TIMELINE</b> 06 Key events of 2018 and Q1/Q2 2019
<b>TOP 10 FINDINGS</b> 08 A range of actionable data and insights	<b>OVERVIEW</b> 10 A pragmatic generation – neither radical nor revolutionary <b>Afshin Molavi</b>	<b>RELIGION</b> 16 Arab youth struggle with religious values and institutions trapped in the past <b>Mohammad Shahrour</b>
<b>GOVERNMENT ROLE</b> 22 Arab youth deserve – and demand – a better future <b>Jihad Azour</b>	<b>EDUCATION</b> 28 Education failings leave young Arabs with uncertain futures <b>Kim Ghattas</b>	<b>FOREIGN RELATIONS</b> 34 Gulf states inherit the mantle of leadership and influence <b>Hussein Ibish</b>
<b>CONFLICT</b> 40 Political fatigue among Arab youth is not only about ending conflict, it is about building futures <b>Faisal Al Yafai</b>	<b>MODEL NATION</b> 46 UAE enjoys the dividends of embracing global values and an open, tolerant culture <b>Sunil John</b>	<b>DRUG USE</b> 52 Action needed to tackle rising drug use among Arab youth <b>Osama Al Sharif</b>
<b>MENTAL HEALTH</b> 58 Attitudes to mental health have a high cost for Arab society <b>Justin Thomas</b>	<b>E-COMMERCE</b> 64 Arab youth and the revolution in online retail <b>Cyrille Fabre &amp; Anne-Laure Malauzat</b>	<b>MEDIA CONSUMPTION</b> 72 Arab youth want independent sources of news and alternative narratives <b>Iain Akerman</b>
<b>ABOUT US</b> 74 ASDA'A BCW, PSB and Proof Communications	<b>INDICATORS</b> 75 Social, economic and social media indicators 2019	

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# INTRODUCTION

## A PLATFORM FOR DEBATE AROUND CRUCIAL ISSUES FACING THE MIDDLE EAST

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Sunil John

President – Middle East and Founder of ASDA'A BCW

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

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

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

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

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

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

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

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

# METHODOLOGY

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

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

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

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

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

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

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

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

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

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

UAE	Oman	Bahrain	KSA	Kuwait	Egypt	Jordan	Lebanon
N=300	N=200	N=200	N=300	N=200	N=300	N=200	N=200
Dubai (40%)	Muscat (50%)	Manama (100%)	Jeddah (40%)	Kuwait City (20%)	Cairo (50%)	Amman (50%)	Saida (20%)
Sharjah (20%)			Riyadh (40%)	Hawalli (30%)			Beirut (60%)
Abu Dhabi (40%)	Batinah (50%)		Dammam (20%)	Al Ahmadi (20%)	Alexandria (25%)	Irbid (25%)	
				Al Farwaniya (30%)	Mansoura (25%)	Zarqa (25%)	Tripoli (20%)
Iraq	Tunisia	Libya	Algeria	Morocco	Yemen	Palestinian Territories	
N=250	N=200	N=200	N=200	N=200	N=200	N=150	
Baghdad (50%)	Tunis (50%)	Tripoli (65%)	Algiers (50%)	Casablanca (25%)	Sannaa (50%)	Gaza (50%)	
Irbil (25%)	Safaqis (25%)		Oran (25%)	Fes (25%)		Al Hudaydah (25%)	West Bank (50%)
Basrah (25%)	Susah (25%)	Benghazi (35%)	Constantine (25%)	Marrakech (25%)	Ta'izz (25%)		

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

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

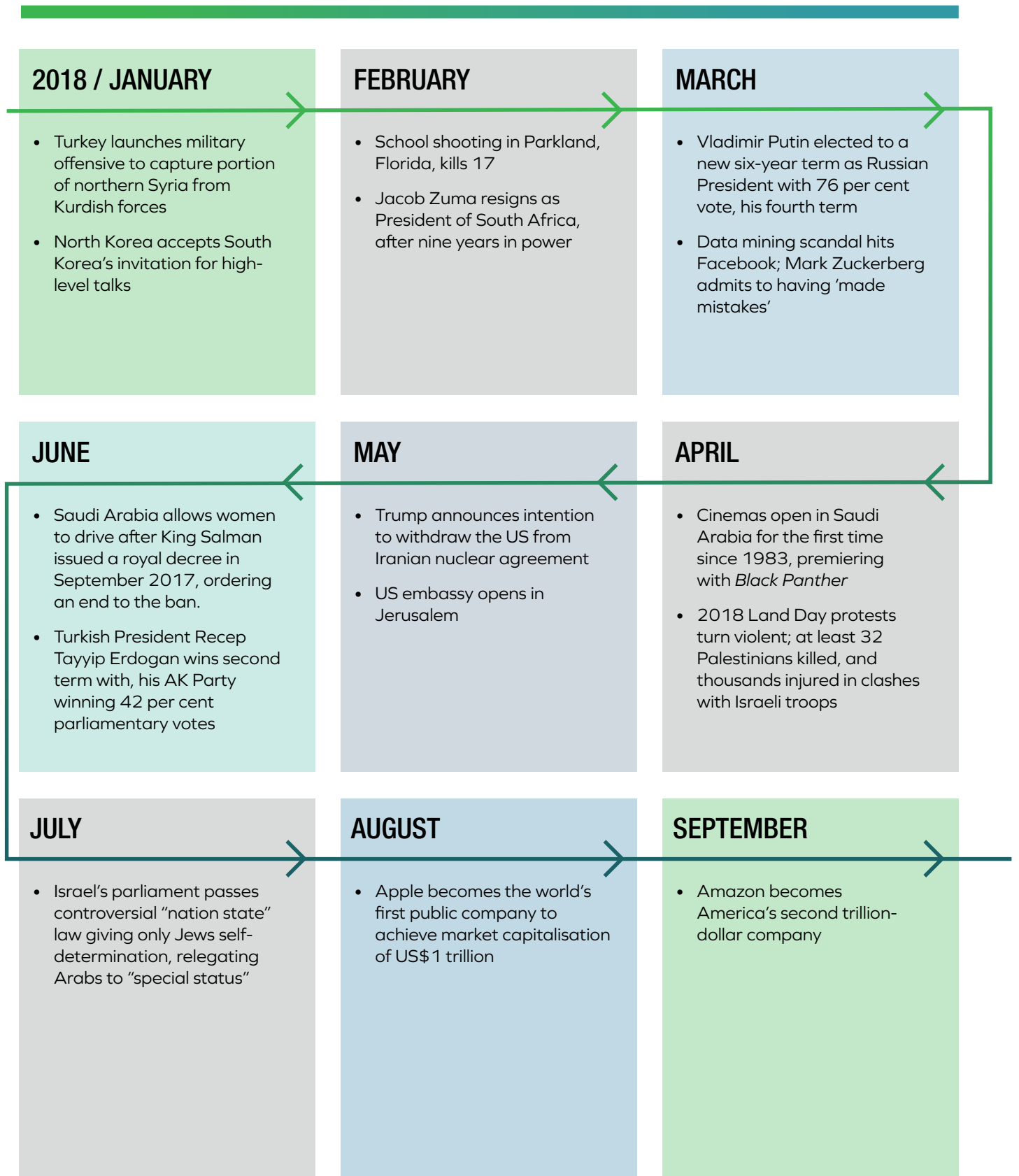


**15**  
Countries and  
territories

Sample split  
**50:50**  
male/female

# TIMELINE

## KEY EVENTS OF 2018 AND Q1/Q2 2019



## OCTOBER

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

## NOVEMBER

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

## DECEMBER

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

## MARCH

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

## FEBRUARY

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

## 2019 / JANUARY

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

## APRIL

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



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# TOP 10 FINDINGS

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

1

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## RELIGION

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

2

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## GOVERNMENT ROLE

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

3

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## EDUCATION

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

4

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## FOREIGN RELATIONS

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

5

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## CONFLICTS

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

---

6

**MODEL NATIONS**

For the eighth year running, the UAE continues its surge as the Arab youth's top country to live in and to emulate

7

**DRUG USE**

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

8

**MENTAL HEALTH**

Mental health issues impact many young Arabs, yet access to quality medical care is scarce

9

**E-COMMERCE**

Young Arabs are driving the region's e-commerce boom

10

**MEDIA CONSUMPTION**

Among Arab youth, social media is more popular and seen as more trustworthy than traditional media

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# OVERVIEW

## A PRAGMATIC GENERATION – NEITHER RADICAL NOR REVOLUTIONARY

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

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### Afshin Molavi

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

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

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

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


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

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

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

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

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



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

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

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

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

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

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

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

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



# RELIGION

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

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

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

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

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

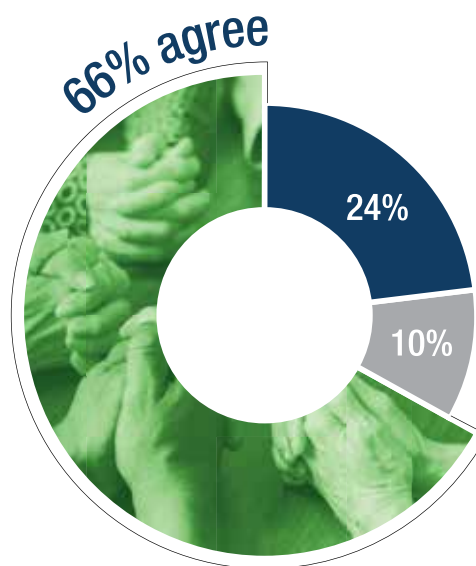
Despite strong views on how big a role religion plays and need for the reform of religious institutions, young Arabs are more divided when it comes to the impact of religion on the region. Asked whether they agree or disagree with the statement “The Arab world’s religious values are holding the Arab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

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

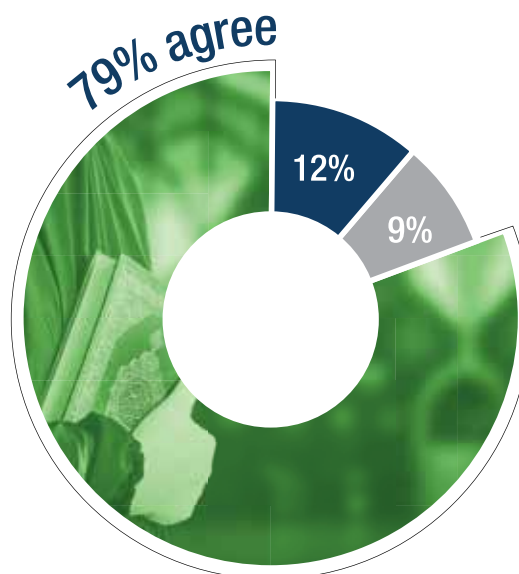
## YOUNG ARABS SAY RELIGION PLAYS TOO BIG OF A ROLE IN THE MIDDLE EAST AND RELIGIOUS INSTITUTIONS NEED TO BE REFORMED

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

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



“The Arab world needs to reform its religious institutions”



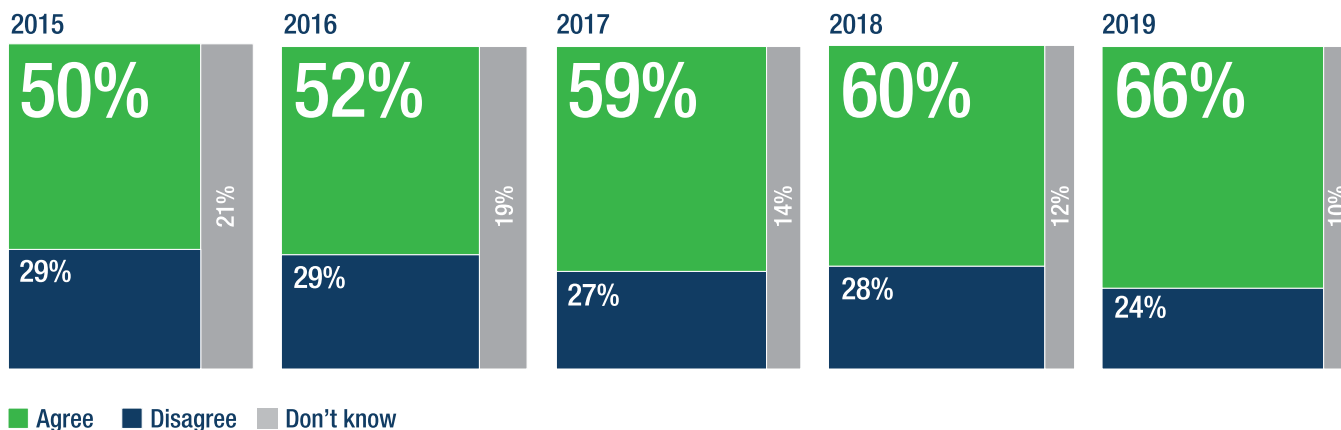
■ Agree ■ Disagree ■ Don't know

## PERCEPTION THAT RELIGION IS TOO INFLUENTIAL IN THE REGION IS ON THE RISE

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

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

(Showing % agree)

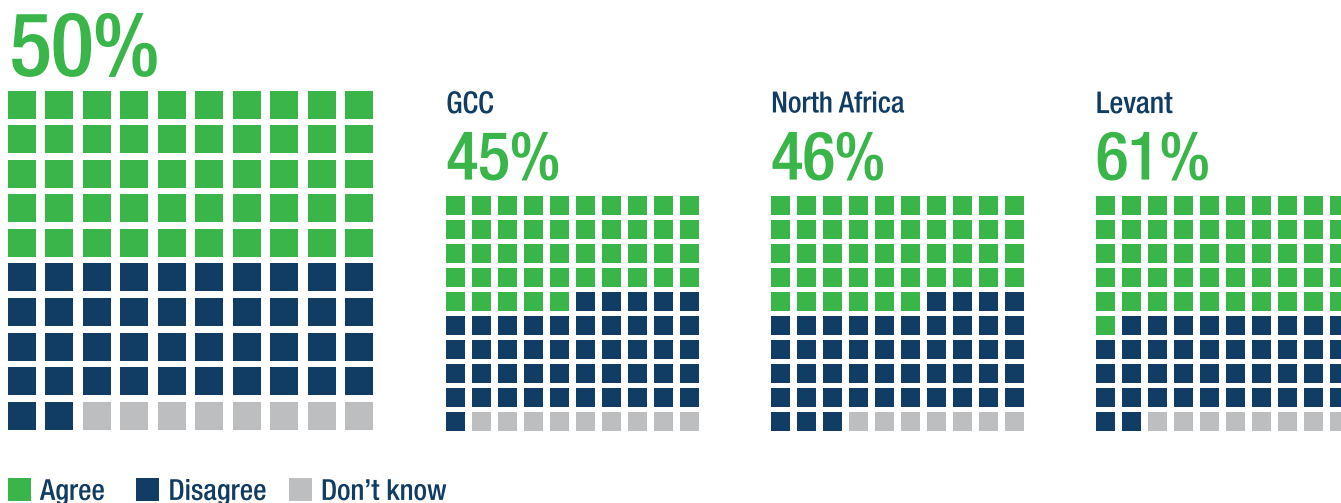


## HALF OF YOUNG ARABS SAY RELIGIOUS VALUES ARE HOLDING THE REGION BACK

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

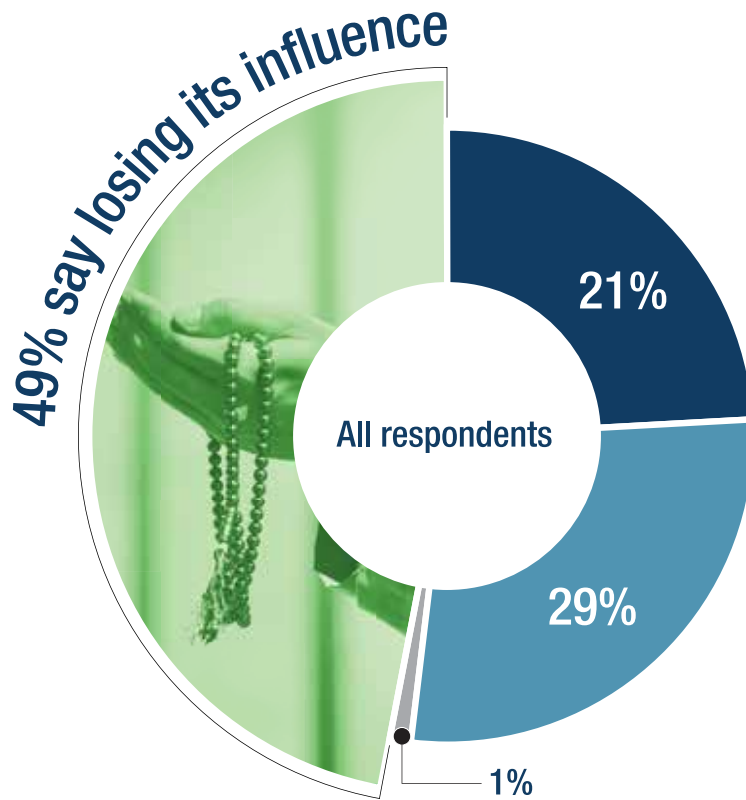
“Arab world's religious values are holding the Arab world back”

All respondents



## AT THE SAME TIME, MANY SAY RELIGION IS LOSING ITS INFLUENCE, PARTICULARLY OUTSIDE THE GCC COUNTRIES

DO YOU THINK RELIGION IS INCREASING ITS INFLUENCE ON THE ARAB WORLD OR LOSING ITS INFLUENCE?



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



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# ARAB YOUTH STRUGGLE WITH RELIGIOUS VALUES AND INSTITUTIONS TRAPPED IN THE PAST



Dr. Mohammad Shahrouh is a Professor of Civil Engineering at the University of Damascus and one of the leading researchers in contemporary reading of the Quran. One of the most prominent modern Islamic scholars, Dr Shahrouh has millions of followers on social media. His ideas on Islam have generated international interest, and Dr Shahrouh has featured in *The Economist*, *The New York Times*, *Der Spiegel*, and *Die Welt*. In addition to being the co-presenter of Abu Dhabi TV's *Laallahom Yaaqiloun*, he has published articles in publications by the Council on Foreign Relations in New York, Harvard University, Boston University, Dartmouth University and the University of Berlin.

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## Mohammad Shahrouh

Reading through the results of the latest Arab Youth Survey proved to be a bittersweet experience. On the one hand, they reveal that young Arabs are aware of and educate themselves on matters surrounding their faith. On the other, the results bring to light an intellectual dilemma plaguing this generation.

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**The only way to break this cycle is for religious institutions and their leaders to recognise that the system needs to be revisited and updated. After that, we can begin our intellectual reform, determining what is truly sacred in our religion and what is not, then analysing misguided teachings to establish what is acceptable and what is not.**

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What the Survey shows us is that the young remain conflicted between their affinity and commitment to their faith, and those developments that have transformed human life and which seem at odds with their intellectual heritage.


This intellectual crisis is deep, especially among young Muslims, who make up the vast majority of the faithful in the Middle East. We see that young Arabs remain attached and devoted to their faith despite being unconvinced of some of the inherited thoughts and religious strictures, which discourage individual thought and which force youth to live within the confines of *Halal and Haram* – what is permissible and what is forbidden. These dos-and-don'ts do not necessarily refer to what Allah inscribed in the Holy Qur'an, but rather to rules set by religious scholars who consider themselves enforcers of His word.

This generation of Arabs grew up in the midst of a far-reaching civilisational upheaval with access to increasingly advanced technologies. This allowed them to keep pace with worldwide developments, opening their minds to virtually all cultures and civilisations. Consequently, the religious cultural heritage of Muslim Arabs, which was formulated in the 7th Century, lost its relevance to them, leading them to live in a state of confusion as they constantly contrast between what they were taught at

home and current enlightenment and knowledge. It would be easy for them to resolve their confusion by simply renouncing their faith, however, they have refused to do so. Instead, they hold on to their religion, unable to pinpoint the problem areas they know exist. We see them hesitate at times and push for reform at others. While we see urgency and necessity in fulfilling these calls for reform, religious institutions and leaders turn a deaf ear, quite regrettably, to such demands, under the pretext of safeguarding religion. Reform could very well be the best approach to preserving and sustaining the faith.

The conflict lies in the fact that a 7th-Century understanding of religion continues to be imposed on reality today, not only socially and intellectually, but also politically. This sets the stage for the intellectual, religious, and political crises our societies are facing today: the consequences of which disproportionately affect the youth. In the face of modernity, they find themselves in an intellectual vortex, with old religious thoughts presented to them under the guise of heritage – ideologies that are rigid, closed,

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## Young generations need to experience faith in a 21st-Century model; one that embraces modern-day awareness and finds solutions to current problems by drawing on a contemporary perception of religion. Attempts to impose outdated heritage, even by force, will fail, because religion seeks to enlighten humankind, not subjugate it.

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and opposed to any modernising force, dismissing all that is new and unfamiliar as heresy. The interpretation of religion that was passed down to the youth is simplistic, inflexible, and retrogressive.

Yet leaders of the religious establishment want to continue to impose it on new generations, all the while granting religious legitimacy to political parties with religious leanings under hollow slogans that have proved to be infeasible or overreaching, such as "Islam is the Solution."

It is no secret that for nearly half a century, we have been calling for reform in our interpretation of religion, only to be faced with rejection and marginalisation, and accused of malicious intentions.

Undeterred, we forewarned against continuing down the road that led us to the reality we live in today. No-one cared to listen at the time and yet here we are: as predicted, the intellectual crisis in our religious culture has escalated, reaching an impasse, and spawning violence and counter-violence. Violent religious extremism has been faced with worldwide military retaliation, yet the root of the problem remains an integral facet of our

heritage. Even if we succeed in eliminating terrorism through military action, its infectious sources – twisted interpretations of faith – will remain rooted in our society.

Therefore, the only way to break this cycle is for religious institutions and their leaders to recognise that the system needs to be revisited and updated. After that, we can begin our intellectual reform, determining what is truly sacred in our religion and what is not, then analysing misguided teachings to establish what is acceptable and what is not.

We believe this is the only way to answer the questions of the youth who took part in this survey; who consider the religious culture they inherited incapable of driving them forward, let alone playing a part in building a civil society. A restructuring of religious institutions that takes enlightenment and scientific breakthroughs into consideration will enable young generations to look at their faith in a new light, proving to them that it carries at its core a divine universal message based on mercy, not punishment. Islam came as a blessing to the world; it is not very wise to constrict it to a narrow 7th-Century perspective.

Young generations need to experience the faith in a 21st-Century model; one that embraces modern-day awareness and knowledge and finds solutions to current problems by drawing on a contemporary perception of religion. Attempts to impose outdated heritage, even by force, will fail, because religion seeks to enlighten humankind, not subjugate it.

We have sought to produce a contemporary reading of religion – a first step towards reform. Our interpretation was well received by the youth, who long to genuinely understand their religion, rather than blindly accept and follow foremost teachings and interpretations. We only hope that their voices are heard by religious leaders and decision-makers in our communities, inspiring them to rally joint efforts towards renewing religious thought and delivering enlightened guidelines, drawing on the wise teachings sent to us by Allah the Merciful.

*(Article translated from the original Arabic text.)*



# GOVERNMENT ROLE

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

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

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

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

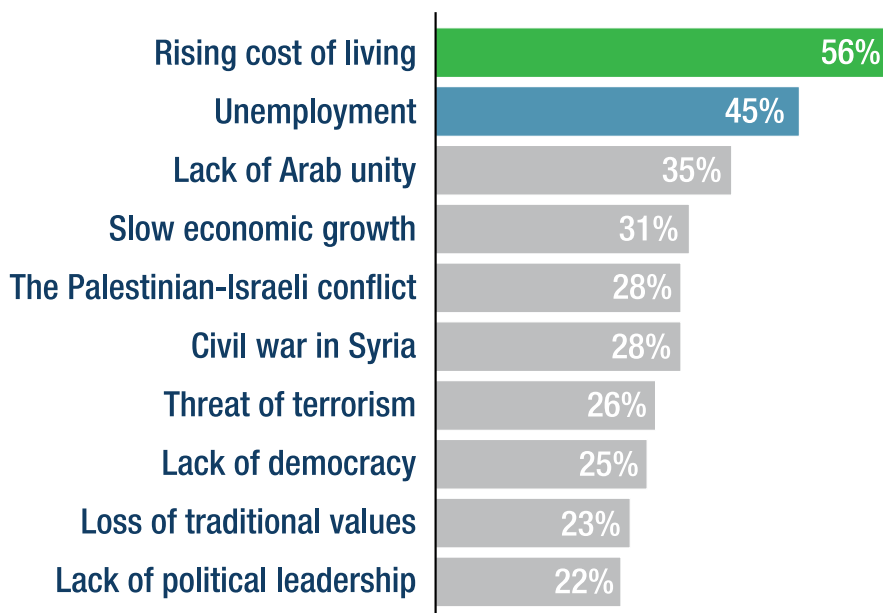
The majority of young Arabs say governments have a responsibility to provide a range of services and safeguards to all citizens, including: safety and security (96 per cent); education (89 per cent); healthcare (88 per cent); subsidised energy (78 per cent); jobs (78 per cent) and housing (60 per cent).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

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

## ECONOMIC ISSUES, NAMELY RISING COST OF LIVING AND UNEMPLOYMENT, ARE THE DOMINANT CONCERNS AMONG YOUNG ARABS

### NOW THINKING ABOUT THE MIDDLE EAST, WHAT DO YOU BELIEVE ARE THE BIGGEST OBSTACLES FACING THE MIDDLE EAST?

(Showing top 10 obstacles)



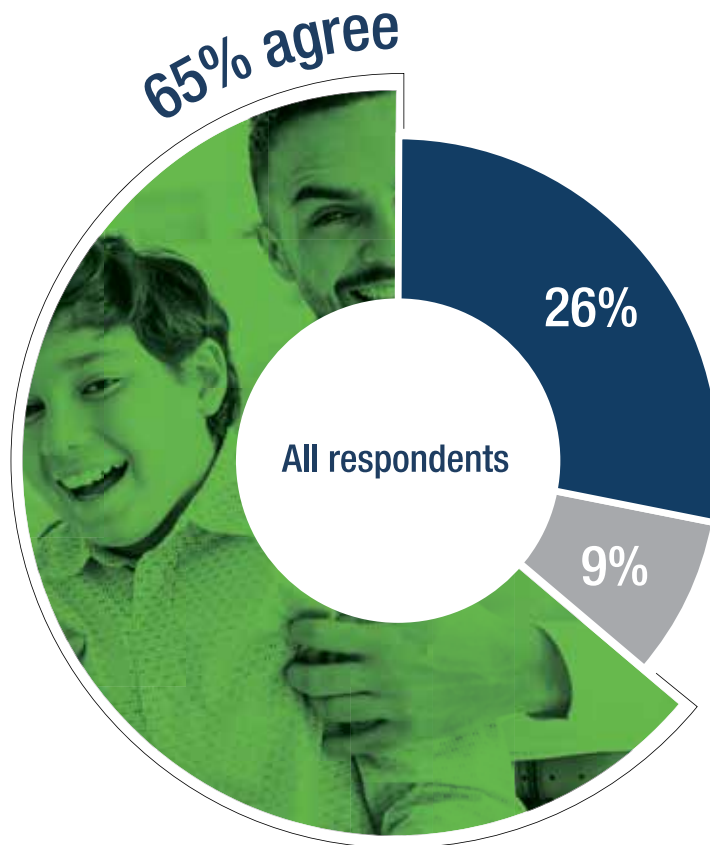
Top three concerns facing the Middle East

2012	2013	2014	2015	2016	2017	2018
Rising cost of living	Rising cost of living	Civil unrest	Rise of Daesh	Rise of Daesh	Rise of Daesh	Rising cost of living
Government corruption	Government corruption	Lack of democracy	Threat of terrorism	Threat of terrorism	Unemployment	Unemployment
The economy	The economy	Weak political leadership	Unemployment	Unemployment	Threat of terrorism	Threat of terrorism

## TWO IN THREE SAY THEIR COUNTRIES ARE NOT DOING ENOUGH TO HELP YOUNG FAMILIES

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

“My country is not doing enough to help young families”



#### GCC



#### North Africa



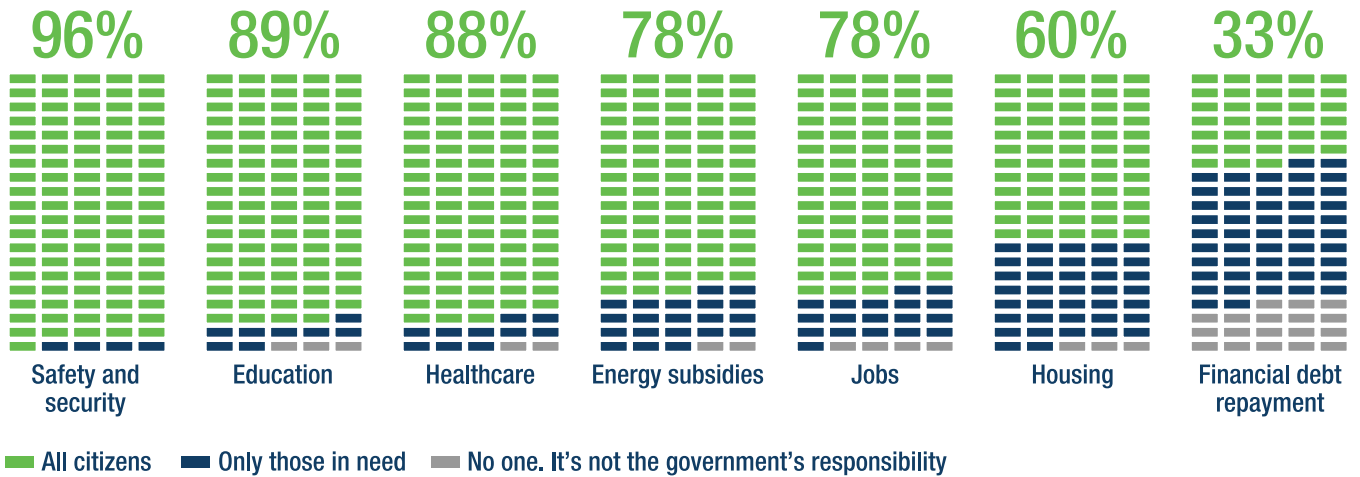
#### Levant



■ Agree ■ Disagree ■ Don't know

## A MAJORITY OF ARAB YOUTH SAY IT IS THE GOVERNMENT'S RESPONSIBILITY TO PROVIDE SAFETY, EDUCATION, HEALTHCARE, ENERGY SUBSIDIES, JOBS, AND HOUSING TO ALL CITIZENS

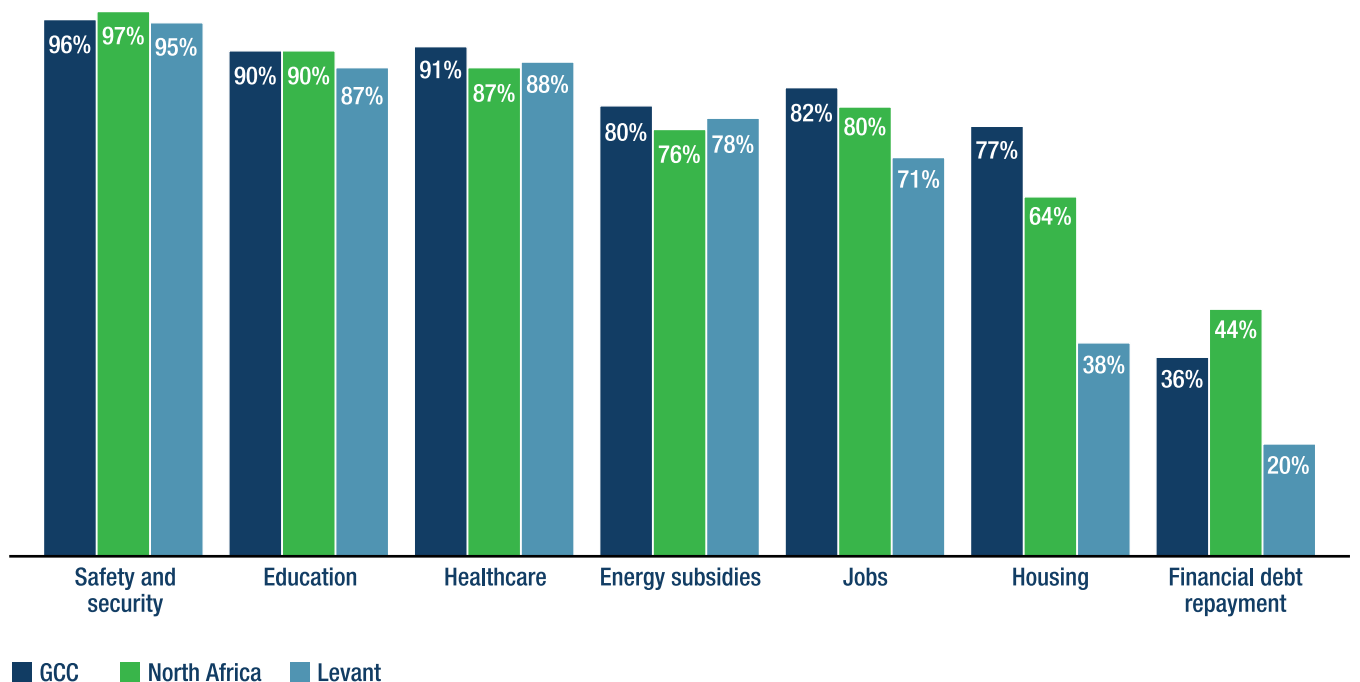
IT SHOULD BE THE GOVERNMENT'S RESPONSIBILITY TO PROVIDE \_\_\_\_\_ TO...?



## ARAB YOUTH THROUGHOUT THE REGION HAVE HIGH EXPECTATIONS OF WHAT GOVERNMENTS SHOULD PROVIDE

IT SHOULD BE THE GOVERNMENT'S RESPONSIBILITY TO PROVIDE \_\_\_\_\_ TO ALL ITS CITIZENS?

(Ranked by 'all')



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# ARAB YOUTH DESERVE – AND DEMAND – A BETTER FUTURE



Dr. Jihad Azour is the Director of the International Monetary Fund's Middle East and Central Asia Department (MCD). Jihad served as Lebanon's Finance Minister from 2005 to 2008, during which time he co-ordinated the implementation of important reforms at the national level and within the Finance Ministry. He has held a wide range of posts in the private sector, including McKinsey and Booz & Co. where he served as vice president and senior executive advisor from 2009 to 2013. Prior to joining the Fund, he was a managing partner at advisory and investment firm Inventis Partners. Jihad holds a PhD in International Finance and a post-graduate degree in International Economics and Finance, both from the Institut d'Etudes Politiques de Paris.

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## Jihad Azour

For a generation of young Arabs, a decade that began with the promise of change nears its end with tens of millions still longing for peace, prosperity, and the opportunity for a better future. That's the finding of the latest ASDA/A BCW Arab Youth Survey, which, once again, provides a vital glimpse into the aspirations of young people across the Arab region

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**We must ask ourselves this: will we continue down a path that has not delivered the opportunities that young people seek, or will we chart a new course toward a more equitable, prosperous future?**

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The survey shows that young Arabs, rightly, in my view, want capable governments that are accountable, efficient, and provide opportunities for prosperity. A new social contract that sees the state create an environment for youth to thrive and unleashes their ingenuity to drive prosperity for decades to come.

The survey sheds light on their growing frustrations, which are rooted in economic

futures that are more and more uncertain. Young Arabs care deeply about regional causes and want protracted conflicts to end. As making ends meet grows harder –the top concern of youth in the region, according to the survey – pressures are growing more acute. For example, for the fifth year in a row, high unemployment rates as one of the top frustrations for young people.

Their frustration is understandable. Youth unemployment is alarmingly high in the region, exceeding 30 per cent in many countries. With an estimated 2.8 million youth joining the workforce in the Middle East and North Africa (MENA) each year over the next 10 years, the urgency of this challenge will only grow. Reforms are under way but reform by its nature takes time. Far faster progress is needed.

Therefore, we must ask ourselves this: will we continue down a path that has not delivered the opportunities that young people seek, or will we chart a new course toward a more equitable, prosperous future?

With the IMF projecting growth for the region at just 1.3 per cent in 2019, a new way is urgently needed. The model of state

patronage with the public sector acting as the employer of first resort is no longer capable of providing enough jobs for the region's well-educated and tech-savvy youth. Education and public services do not equip youth for an era of rapid technological change. The state continues to dole out large energy subsidies that primarily benefit the well-off and distort the economies, while existing social safety nets do not effectively protect the region's poorest and most vulnerable citizens. Moreover, this system has saddled many countries with large deficits, crowding out social and investment spending while burdening future generations with unsustainable debt. Nowhere in the world can governments provide everything to everybody. Expecting them to do so is not sustainable. Resources are scarce. There is a trade-off between ensuring spending that can benefit all in a sustainable way and spending that is wasteful.

The good news is there is a better way. While governments cannot be the employer of first resort, they have a vital role to play in building an enabling environment for dynamic private sectors, raising living standards and creating opportunities.



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## What is needed is a new social contract between MENA governments and citizens that ensures accountability, transparency and a commitment to the principle that no one is left behind.

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The region's youth are talented and ready to take advantage of such opportunities. Just as an example, MENA has witnessed a seven-fold increase in Fintech startups over the past decade.

What is needed is a new social contract between MENA governments and citizens that ensures accountability, transparency and a commitment to the principle that no one is left behind. A contract that promotes an economic system where all firms compete on a level playing field, leveraging technology and regional trade to expand. A contract that champions greater efficiency by harnessing technology to deliver services to citizens cost-effectively. Further, a contract that moves away from energy subsidies and directs the savings towards infrastructure programs that can boost growth and create jobs. Underlying all of these efforts would be well-designed safety nets to support and empower the vulnerable. Importantly, this proposed contract would provide opportunities for all by providing high-quality education and health services.

One example of how this new vision of government can deliver positive results is

through expanding access to finance for small and medium-sized enterprises (SMEs). SMEs account for 96 per cent of the region's businesses and employ millions of people, but they receive only 7 per cent of bank credit. That is far below the 13 per cent received by SMEs in Europe and 17 per cent by those in Asia. New research at the IMF focuses on how, by promoting policies that facilitate access to finance for SMEs, the region could boost economic growth by up to 1 per cent per year and create as many as 8 million new jobs by 2025.

Unlocking SME access to finance requires a comprehensive approach. Building stable economies, with solid growth and low inflation, is an essential component of this effort. Another critical step is establishing clear rules of the game. That means a system where property rights are protected, and credit information and solvency frameworks are easy to understand and transparent. It is only by tackling this challenge holistically that countries can put in place the conditions for sustainable SME access to finance.

Finally, this new social contract will not be possible unless corruption in the region,

which has eroded trust between governments and citizens, is addressed. The IMF has developed a new framework that looks more systematically and broadly at governance vulnerabilities. A key takeaway is that corruption thrives in complexity, and that budget transparency and simplified rules and regulations can help reduce the opportunities for corruption and help promote higher and more inclusive growth.

Transforming this new economic vision for MENA into a reality will require governments to play a key role—just a different one than we have seen in the past. Some progress has already been made. However, the latest youth survey makes clear that we have a long way to go. Despite their understandable frustrations, young people still hold fast to the hope for a better future. They have shared with us their aspirations and fears. Now is the time for all of us to listen—and act.



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# 3

## EDUCATION

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

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

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

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

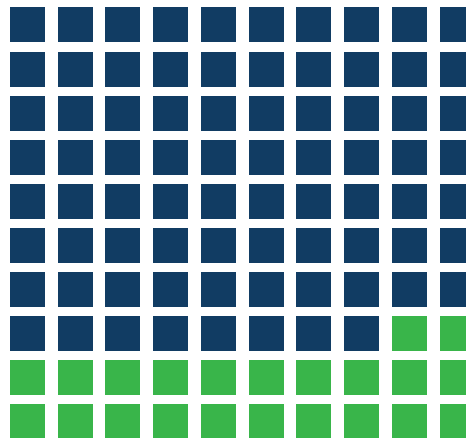
Concerns over schooling extends to higher education, with just a third of young Arabs (32 per cent) saying that, should they choose to pursue further education, they would do so in their home country. The majority, 53 per cent, would seek to attend college or university in the West, while just 15 per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

## THE MAJORITY OF YOUNG ARABS ACROSS THE REGION ARE CONCERNED ABOUT THE QUALITY OF EDUCATION THEY RECEIVE IN THEIR COUNTRY

### HOW CONCERNED WOULD YOU SAY YOU ARE ABOUT THE QUALITY OF EDUCATION?

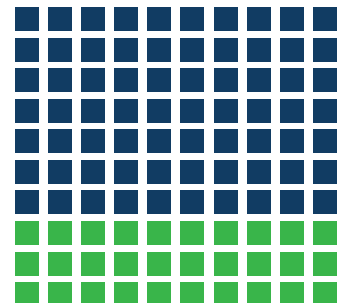
All respondents

78%



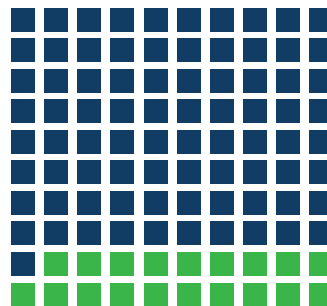
GCC

70%



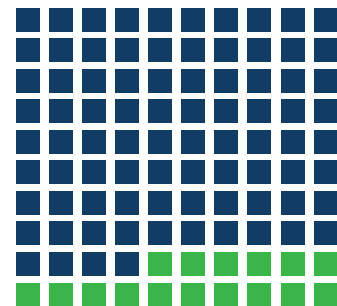
North Africa

81%



Levant

84%

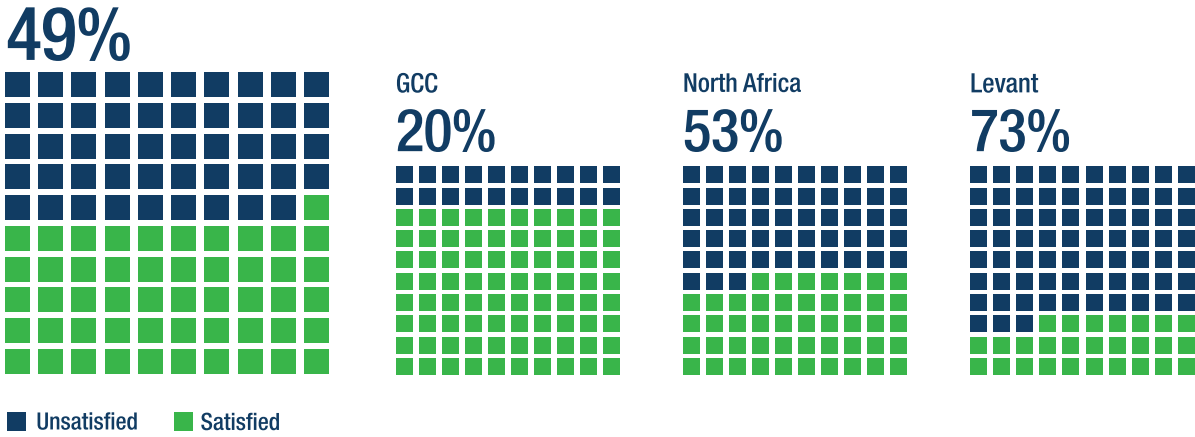


■ Concerned ■ Unconcerned

# MANY YOUNG ARABS, ESPECIALLY IN THE LEVANT, FEEL THEIR COUNTRY'S EDUCATION SYSTEM DOES NOT PREPARE THEM FOR THE JOBS OF THE FUTURE

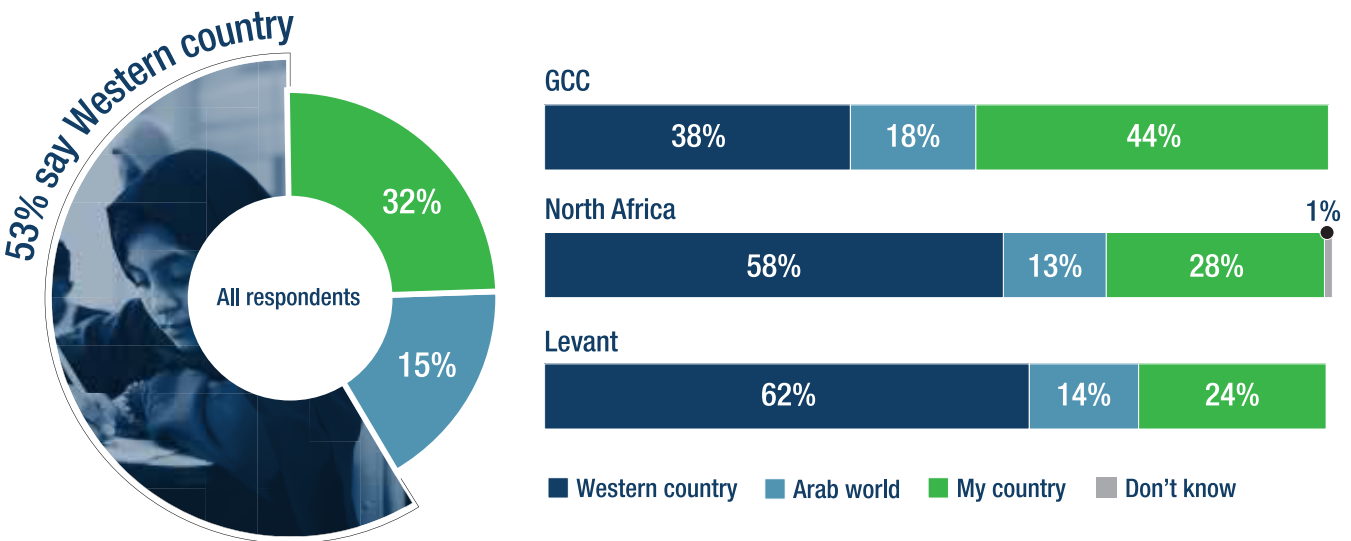
## THINKING ABOUT EDUCATION, HOW SATISFIED ARE YOU WITH THE PREPARATION OF STUDENTS FOR JOBS OF THE FUTURE?

All respondents



# MERELY ONE IN THREE YOUNG ARABS WOULD PREFER TO PURSUE HIGHER EDUCATION IN THEIR OWN COUNTRY, WITH MOST WANTING TO ATTEND COLLEGE OR UNIVERSITY IN THE WEST

## IF YOU WERE TO FURTHER YOUR EDUCATION, WHERE WOULD YOU PREFER TO PURSUE HIGHER EDUCATION?





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# EDUCATION FAILINGS LEAVE YOUNG ARABS WITH UNCERTAIN FUTURES



Kim Ghattas is a non-resident scholar at Carnegie Endowment for International Peace. A longtime BBC correspondent, she has covered the Middle East, the US State department and US elections. She is the author of *The New York Times* bestseller: *The Secretary: A Journey with Hillary Clinton from Beirut to the Heart of American Power*. She is currently working on her second book, about the regional impact of the Saudi-Iran rivalry since 1979, due out in winter 2020. She sits on the board of trustees of the American University of Beirut.

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## Kim Ghattas

Underserved and unappreciated, the region's youth continue to be an untapped resource and their disappointment with the education they are receiving is the least surprising finding of this year's Survey. When three-in-four Arabs say they are unhappy with the education in their country, however, what they are really expressing is their concern about employment opportunities. Employment was cited as the top concern of young Arabs in the 2017 ASDA'A Survey, ahead of terrorism and extremism.

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**Across the region, the problems abound: from a lack of teacher training and an emphasis on rote learning in schools, to the overbearing influence of nationalist or religious dogma in some countries, the lack of critical thinking in education undermines young Arabs' acquisition of the life skills needed to thrive in a competitive market.**

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Warnings about the mismatch between the quality of the education in the Middle East, whether in schools or universities, and the job market have abounded for years. Well before the explosion of discontent in the Arab uprisings, economists, education experts, international organisations and local NGOs, all raised the alarm about the growing youth bulge and the rapid rise in unemployed youth: 65 per cent of the region's population is under 30, and most numbers show that youth unemployment stands at a regional average of 25 per cent and rising. This means it is twice as high as the world average. The IMF has been warning, again, that the problem is only getting worse and could lead to another wave of instability.

And yet, little if anything has been done to address the structural issues in both the educational system and the labour market. Most governments, with some notable exceptions, still spend too much on sectors like defence; Tunisia is spending some \$2 billion on overhauling various aspects of its education system, while Saudi Arabia is also devoting resources to upgrading its education infrastructure.

Across the region, the problems abound: from a lack of teacher training and an emphasis on rote learning in schools, to the overbearing influence of nationalist or religious dogma in some countries, the lack of critical thinking in education undermines young Arabs' acquisition of the life skills needed to thrive in a competitive market.

Society still places too much pressure on young people to obtain a university degree at all costs, a highly valued prize which unfortunately does not always translate into marketable skills. In Egypt, university graduates are twice more likely to be unemployed than someone with only a primary degree. Traditional degrees such as engineering or medicine are still oversubscribed, despite the saturated job market. The expectation of a job for life in the public sector has also undercut both the reform of education and the growth of the private sector for decades. This became unsustainable a long time ago for populous countries like Egypt, with its notoriously bloated bureaucracy, or even smaller countries like Jordan and Lebanon-and yet again, nothing is done.

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## The brain drain of the region's brightest is untenable if the Arab world is to have a better, more inclusive future where young people are seen not as a threat to stability, but as an untapped potential to unlock.

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Better planning, including in co-operation with the private sector, is a necessity to match the education infrastructure to the needs of the labour market, including vocational training and re-training, promotion of entrepreneurship and services, such as job counseling and careers fairs.

The pipeline to government, or government-connected, jobs continues to flow in GCC countries, and might explain the discrepancy in answers from Gulf countries: while 70 per cent express concern about the quality of education in their country, only 20 per cent express concern about how well this education is preparing them for the jobs of the future. In rich countries with small populations, such as the UAE or Kuwait, job security is less of a crushing concern. However, even these rentier states must contend with the reality that their successful but ageing model is not a roadmap for the future, neither for their states nor for their citizens.

What is deeply distressing in the survey's findings is that more than a half of young Arabs would prefer to pursue a higher education in the West. Those who can

afford to study abroad will do just that. Most of them will excel with high marks and go on to thrive in jobs in their adoptive countries. Those who do return home with a prized degree will often find their aspirations frustrated and their job search fruitless. Even in Gulf countries, where many Western universities have opened satellite campuses, 38 per cent of respondents still want to study in the West. Restraints on academic freedoms have undercut that particular experiment's potential.

When the region's youth dream of studying in Western universities, they are also in search of more openness, more space to express themselves, more creativity and inclusion; progressive values that few universities offer in the region. One of those is the American University of Beirut (disclosure: I sit on the AUB board). Ranked number one in the region in 2018, it has a long tradition in liberal arts and a track record of producing generations of graduates who have gone on to be leaders in their fields. The region needs more such places of learning to inspire its youth and produce the leaders of tomorrow.

The brain drain of the region's brightest is untenable if the Arab world is to have a better, more inclusive future where young people are seen not as a threat to the stability of governments and systems, but as an untapped potential to unlock. The continued gap between the education sector and the job market is a sure recipe for further instability. Throwing money at the problem to build fancy facilities will not solve the problem either.

To meet the challenges of tomorrow and the aspiration and needs of its youth, countries across the Middle East need to overhaul school curricula and upgrade the degrees on offer, introduce a more interdisciplinary approach to learning in schools and universities, and help channel students towards skills and degrees that will make them desirable on a changing job market - from sustainable agricultural experts to artificial intelligence wizards. There is no issue more urgent in the region today.

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4

# FOREIGN RELATIONS

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

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

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

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

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

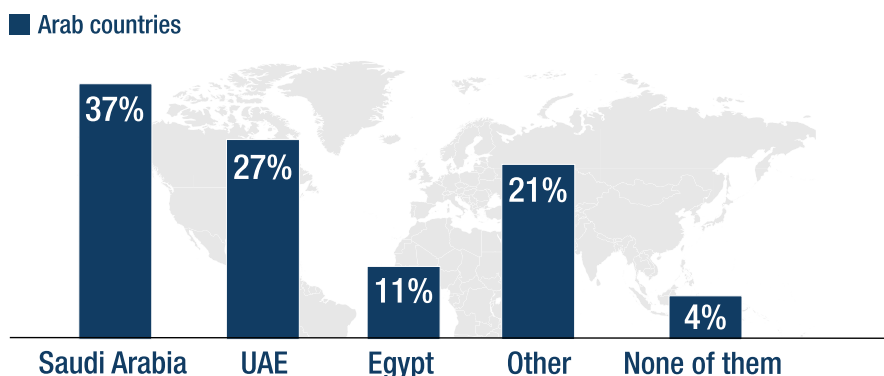
A majority of young Arabs say that the death of Jamal Khashoggi last year will have no long-term negative impact on Saudi Arabia's image abroad. Almost two-thirds, 60 per cent, of young Arabs say there will either be no impact or only a temporary impact on how Saudi Arabia will be perceived internationally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

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

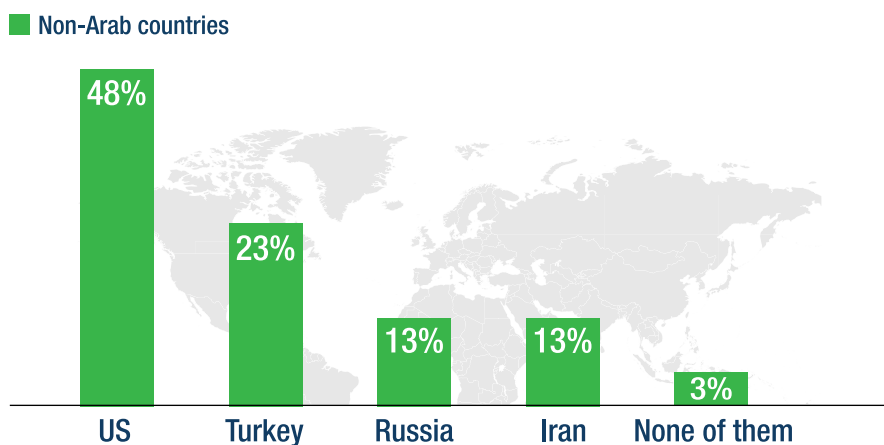
When asked whether US or Russia is a stronger ally of their country, young Arabs are split between the two powers, with 38 per cent saying the US is a stronger ally, 37 per cent choosing Russia, and 25 per cent saying that neither of the two countries is an ally. The regional splits show that GCC youth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

## SAUDI ARABIA AND THE US ARE SEEN AS INCREASING THEIR INFLUENCE ON THE ARAB WORLD MORE THAN ANY OTHER COUNTRIES

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



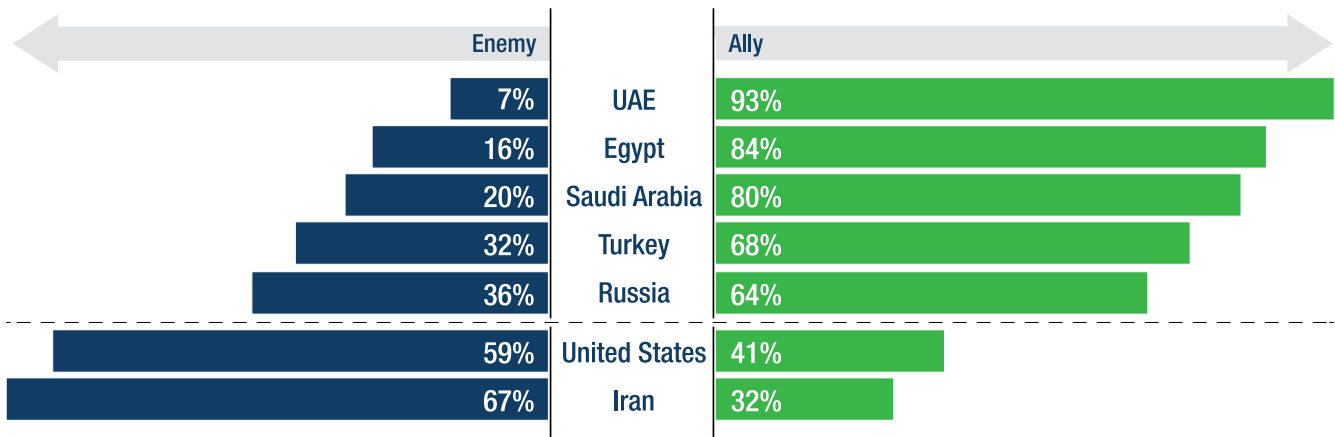
WHICH OF THE FOLLOWING [NON-ARAB] COUNTRIES HAS INCREASED ITS INFLUENCE ON THE ARAB WORLD THE MOST OVER THE PAST FIVE YEARS? PLEASE ANSWER THIS QUESTION REGARDLESS OF WHETHER YOU CONSIDER THESE COUNTRIES AS ALLIES OR ENEMIES OF YOUR COUNTRY.





## WHILE MOST VIEW SAUDI ARABIA AND OTHER ARAB COUNTRIES AS ALLIES, PERCEPTIONS OF US ARE NEARLY AS POLARISING AS PERCEPTIONS OF IRAN

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



## A MAJORITY OF YOUNG ARABS SAY THE DEATH OF JAMAL KHASHOGGI WILL HAVE NO LONG-TERM NEGATIVE IMPACT ON SAUDI ARABIA'S IMAGE ABROAD

HOW MUCH OF A NEGATIVE IMPACT, IF ANY, DO YOU THINK THE KILLING OF JAMAL KHASHOGGI WILL HAVE ON HOW...

(Showing % among all respondents)

### Saudi Arabia is perceived internationally



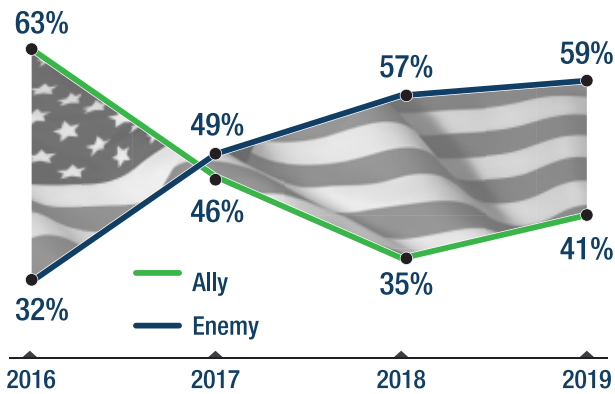
### Saudi Arabia is perceived in the Arab world



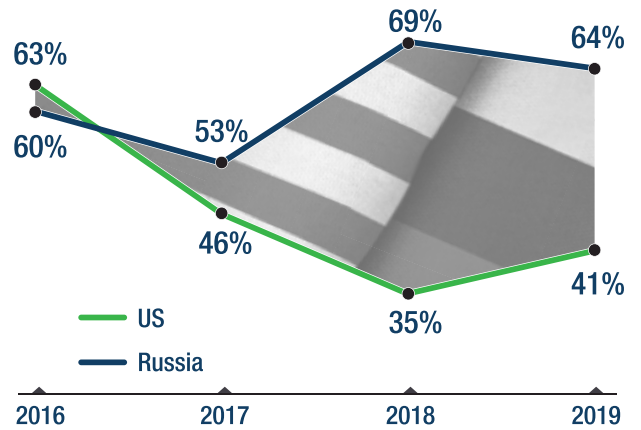
■ No real negative impact ■ A temporary negative impact ■ A long-term negative impact ■ Don't know

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

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

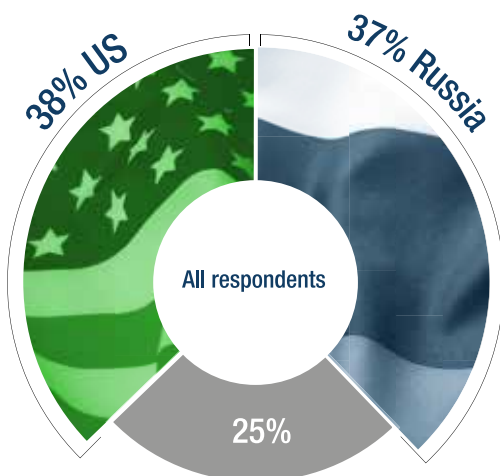


DO YOU CONSIDER \_\_\_\_\_ A STRONG ALLY, SOMEWHAT OF AN ALLY, SOMEWHAT OF AN ENEMY, OR A STRONG ENEMY OF YOUR COUNTRY?



## WHEN ASKED TO CHOOSE BETWEEN THE US AND RUSSIA, YOUNG ARABS ARE DIVIDED ON WHICH OF THE TWO IS A STRONGER ALLY

WHICH OF THE TWO IS A STRONGER ALLY OF YOUR COUNTRY?



GCC



North Africa



Levant



■ US ■ Russia ■ Neither

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# GULF STATES INHERIT THE MANTLE OF LEADERSHIP AND INFLUENCE

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Hussein Ibish is a senior resident scholar at the Arab Gulf States Institute in Washington. He is a weekly columnist for *Bloomberg Opinion* and is a regular contributor to many other publications. He has made thousands of radio and television appearances and was the Washington DC correspondent for the *Daily Star* (Beirut). Ibish previously served as a senior fellow at the American Task Force on Palestine, and as executive director of the Hala Salaam Maksoud Foundation for Arab-American Leadership from 2004 to 2009. From 1998 to 2004, Ibish served as communications director for the American-Arab Anti-Discrimination Committee. He has a PhD in comparative literature from the University of Massachusetts, Amherst.

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## Hussein Ibish

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It would be difficult to find a better measure of Arab opinion about regional and international powers than the Arab Youth Survey. The 2019 Survey results provide a solid summary of regional perspectives on other countries, with the UAE being most readily identified as an ally by respondents (93 per cent) and Iran as an enemy (67 per cent). Unfortunately, for Washington, the United States appears as the runner-up "enemy" at 59 per cent, with a mere 41 per cent considering Washington an ally, continuing a striking downward trend in recent years.

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**US refusal to get drawn into the Syrian war, its relatively hands-off attitude towards the conflicts in Yemen and Libya, and complaints about "free riders" and demands for greater "burden-sharing" by both Barack Obama and Donald Trump are often cited as evidence of a US retreat.**

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However, perceptions of the US appear complex, and perhaps not fully consistent.

By a large margin the US is viewed as the non-Arab country that has most increased its influence in the Arab world – selected by 48 per cent of respondents – with Turkey a distant runner-up at 23 per cent. Yet conventional wisdom often holds that Washington is reducing, not increasing, its engagement with, and therefore influence in, the Arab world.

Obviously, there is more to that than first meets the eye.

US refusal to get drawn into the Syrian war, its relatively hands-off attitude towards the conflicts in Yemen and Libya, and complaints about "free riders" and demands for greater "burden-sharing" by both Barack Obama and Donald Trump are often cited as evidence of a US retreat.


However, Arab youth seem convinced that the US is not only the most important non-Arab influence in the Arab world, but that this influence is increasing. This may reflect an emphasis on cultural, educational and economic influences, which may indeed be increasing, and the American role as the sole superpower in a globalizing international community into which the Arab world is being increasingly drawn.

However, it may also suggest that Arab youth simply do not share the perceptions of many Arab elites and, instead of any extraction, see a US that, even if sometimes reticent, remains the most potent player in the region. Some argue the US retreat from the Arab world is a mirage, and it's certainly difficult to demonstrate any such withdrawal in trade, cultural interaction, military deployments or almost any other quantifiable metric. So, Arab youth may be more accurately seeing a "big picture" than politicians and intellectuals fixated on specific frustrations.

But the news for the US is hardly all good.

In 2017 and 2018, the first two years of the Trump administration, the US went from being considered a "strong ally" (63 per cent in 2016) to 46 per cent and then 35 per cent, close to a 50 per cent collapse in just two years.

In 2019, there is a slight US resurgence to 41 per cent, but that's still well short of the 2016, Obama-era mark. Russia, by contrast, continues to get high marks, down slightly from 69 per cent in 2018 to 65 per cent in 2019.



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## The relative vacuum following the Arab Spring has imposed a burden of leadership on Gulf countries whether they welcome it or not. Power centers such as Cairo, Baghdad and Damascus are unable or unwilling to fulfill their traditional leadership functions.

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Since the US is not perceived as being less influential, the emphasis in this opinion is probably on the “ally” portion of the phrase rather than “strong.”

That’s reinforced by the regional perception breakdown, with 45 per cent of GCC respondents seeing the US as a “stronger ally” than Russia - although Russia does surprisingly well with 38 per cent - contrasted with the Levant, where 45 per cent view Russia as a stronger ally, with only 29 per cent for the US. Given strong US ties to Gulf Arab countries, the solid performance of Russia is more surprising than the slightly stronger American one.

It’s no surprise that Levantine Arab youth, including Lebanese, Palestinians and Iraqis, take a decidedly dimmer view of Washington. Indeed, given some policies of the Trump administration - including recognising Jerusalem as Israel’s capital, endorsing the Israeli annexation of the Golan Heights, placing a travel ban on citizens of a range of mostly Muslim-majority countries, and, at times, indulging in rhetoric critical of Islam and Muslims - it’s arguably not surprising that the US reputation in much of the Arab world is suffering.

However, it is noteworthy that the most positive contrast between the US and Russia for Washington comes from North Africa, which has been largely unaffected by most of those policies and where Russia remains largely unengaged.

And presumably Washington benefits from the “maximum pressure” sanctions campaign against Iran in the eyes of many Arabs.

It remains fascinating that, despite Russia’s strong alliance with Iran and intervention in the Syrian civil war, that Washington is only seen as a stronger ally than Moscow by Gulf youth by a few percentage points. Arguably, Russia, which is barely present in the Gulf except as an alternative arms supplier, mainly represents an abstract idea for many Gulf youth, rather than a set of specific relations and policies. Russia’s continued strong showing suggests that its primary appeal could be as a supposed alternative global power to the US, despite Moscow’s relatively tiny Middle Eastern presence compared with Washington’s and a striking global mismatch in leverage and capabilities.

Russia may well be standing in for an emergent, but still undeveloped,

multipolar world rather than being judged by the actual policies and capabilities of Vladimir Putin’s Kremlin.

By contrast, Saudi Arabia’s strong showing (37 per cent) as the Arab country that has most increased its influence in the Arab world in the past five years seems strongly correlated to specifics. The vacuum of leadership in the Arab world following the Arab Spring in 2011 has imposed a burden of regional leadership on Gulf countries, whether they welcome it or not. Traditional power centres such as Cairo, Baghdad and Damascus are, in various ways, unable or unwilling to fulfill their traditional leadership functions. The Gulf countries alone are sufficiently engaged, prosperous, orderly and able to project Arab regional influence. That’s why the UAE (27 per cent) is the runner-up in this category, with once-mighty Egypt struggling at a mere 11 per cent. This reflects the unmistakable circumstances in the Arab world at present: for good or ill, Gulf countries - most notably but not only Saudi Arabia - have inherited the mantle of leadership and influence. It’s hardly surprising Arab youth public opinion reflects that unambiguous fact.



# 5 CONFLICTS

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

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

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

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

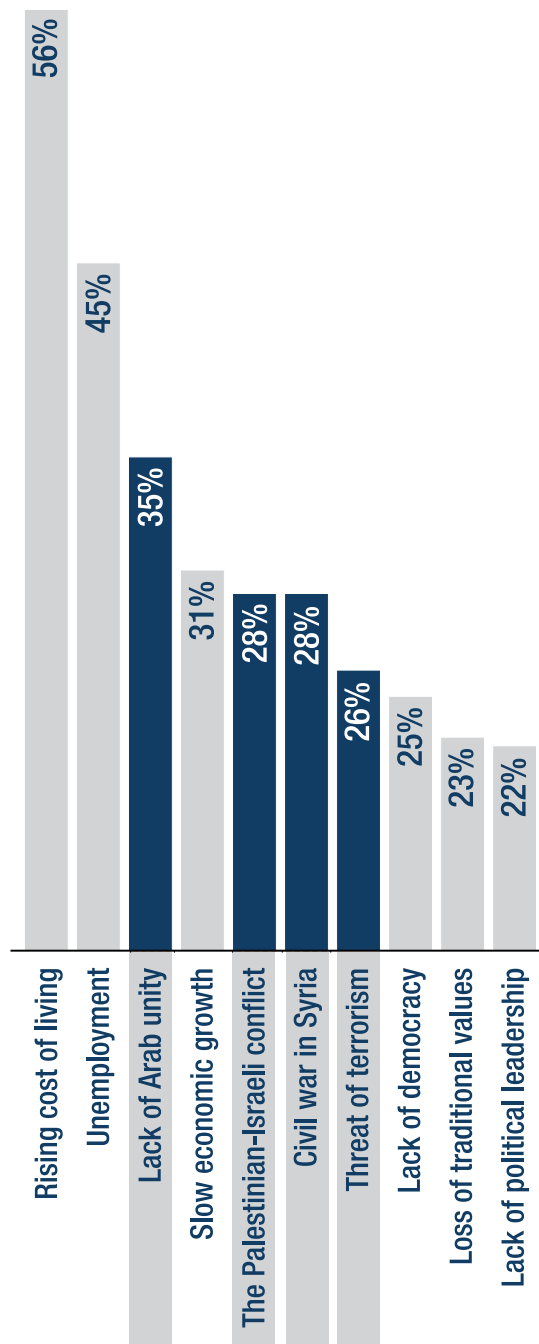
On the Syrian civil war, most young Arabs are keen to see the conflict end, regardless of the closing position of the Assad regime. Given two scenarios – 'that the war should end whether Bashar Al Assad stays in power or not' and 'that the war should not end until Syrian people can freely elect their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

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

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

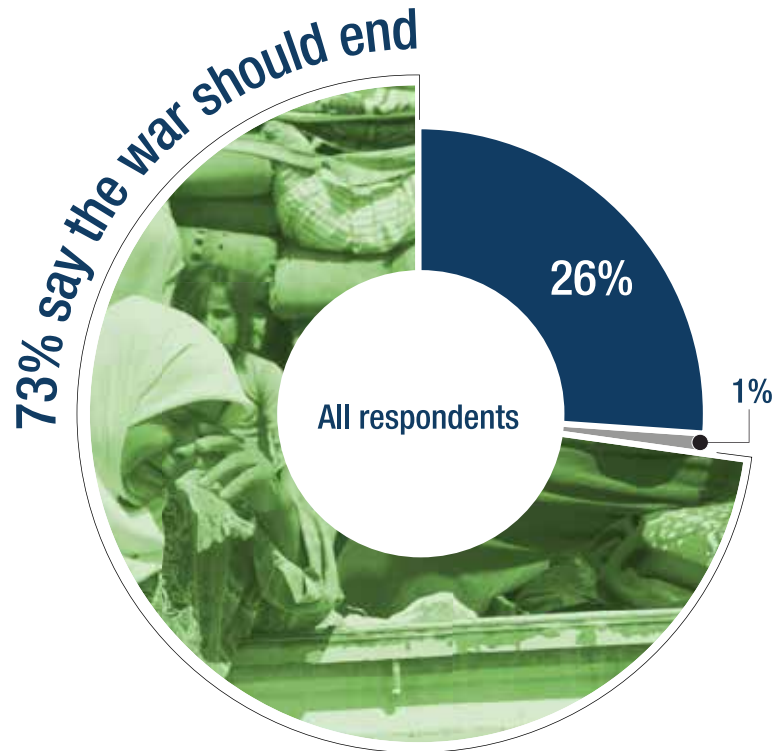
### NOW THINKING ABOUT THE MIDDLE EAST, WHAT DO YOU BELIEVE IS THE BIGGEST OBSTACLE FACING THE MIDDLE EAST?

(Showing top 10 obstacles)



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

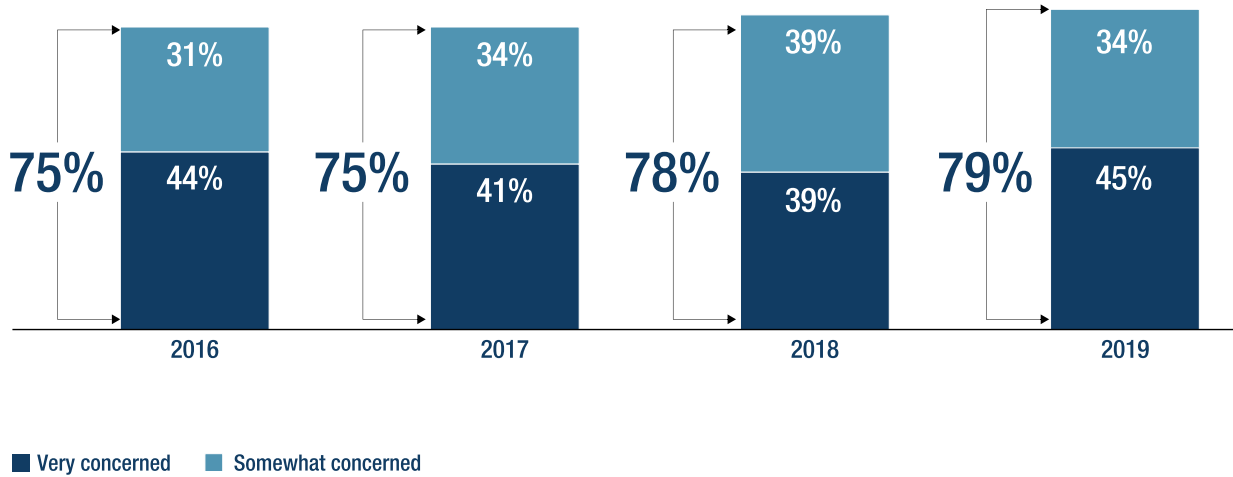
WHICH OF THE FOLLOWING IS CLOSER TO YOUR VIEW ABOUT THE CIVIL WAR IN SYRIA?



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

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

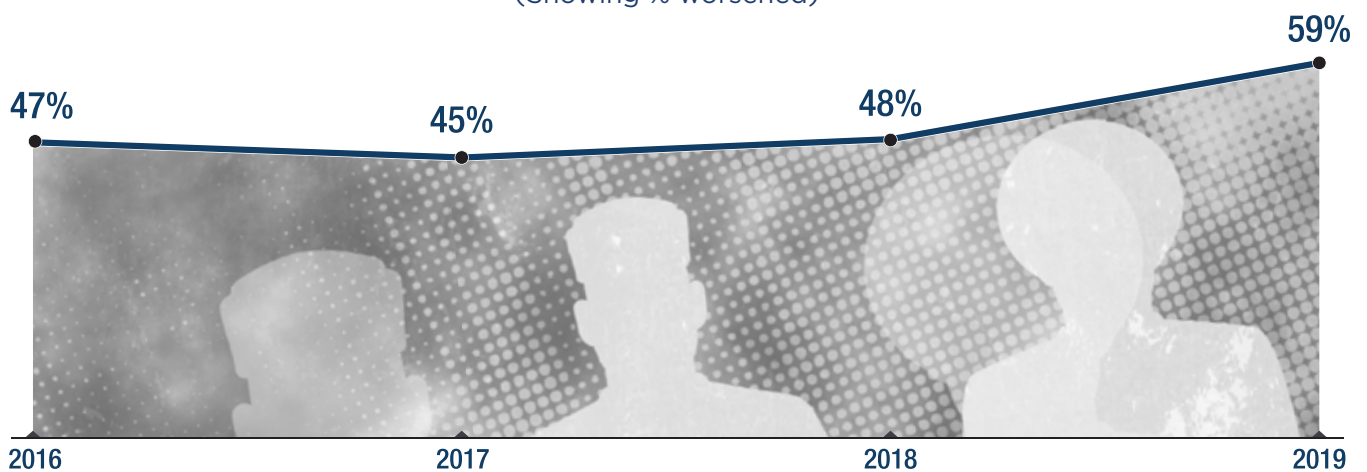
HOW CONCERNED WOULD YOU SAY YOU ARE ABOUT THE PALESTINIAN-ISRAELI CONFLICT?



## THERE IS AN INCREASING PERCEPTION AMONG ARAB YOUTH THAT THE SHIA-SUNNI RELATIONS ARE GETTING WORSE

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

(Showing % worsened)





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# POLITICAL FATIGUE AMONG ARAB YOUTH IS NOT ONLY ABOUT ENDING CONFLICT, IT IS ABOUT BUILDING FUTURES

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Faisal Al Yafai is a journalist and partner at Hildebrand Nord, a strategic consultancy based in London. He has worked as a journalist in several Middle Eastern countries and 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. His columns on foreign policy, economics and international affairs are published and syndicated in Europe, the Middle East and East Asia. A frequent guest on television networks such as CNN, the BBC and France 24, he has also served as a Churchill Fellow in Lebanon and Indonesia.

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## Faisal Al Yafai

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Political fatigue is real. Those of us who report on and analyse the region may well find its complex and evolving politics interesting, but we should never forget, as the apocryphal Chinese proverb has it, that to live in interesting times is a curse.

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**The wars and revolutions, the invasions and occupations of recent years have meant that a majority of young Arabs have some experience of the tragedies of life. Even the Gulf states, the most gilded of the Arab countries, have not escaped the impact of economic upheaval and the repercussions of wars**

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For most of the young people of the Middle East, their lives have been lived predominantly in interesting times.

The wars and revolutions, the invasions and occupations of recent years have meant that a majority of young Arabs have some experience of the tragedies of life, either first hand, or through the

extended experience of friends, families and colleagues. Even the Gulf states, the most gilded of the Arab countries, have not escaped the impact of economic upheaval and the repercussions of wars. To live in the Middle East, at this particular moment in history, is to live through serious and sudden political changes.

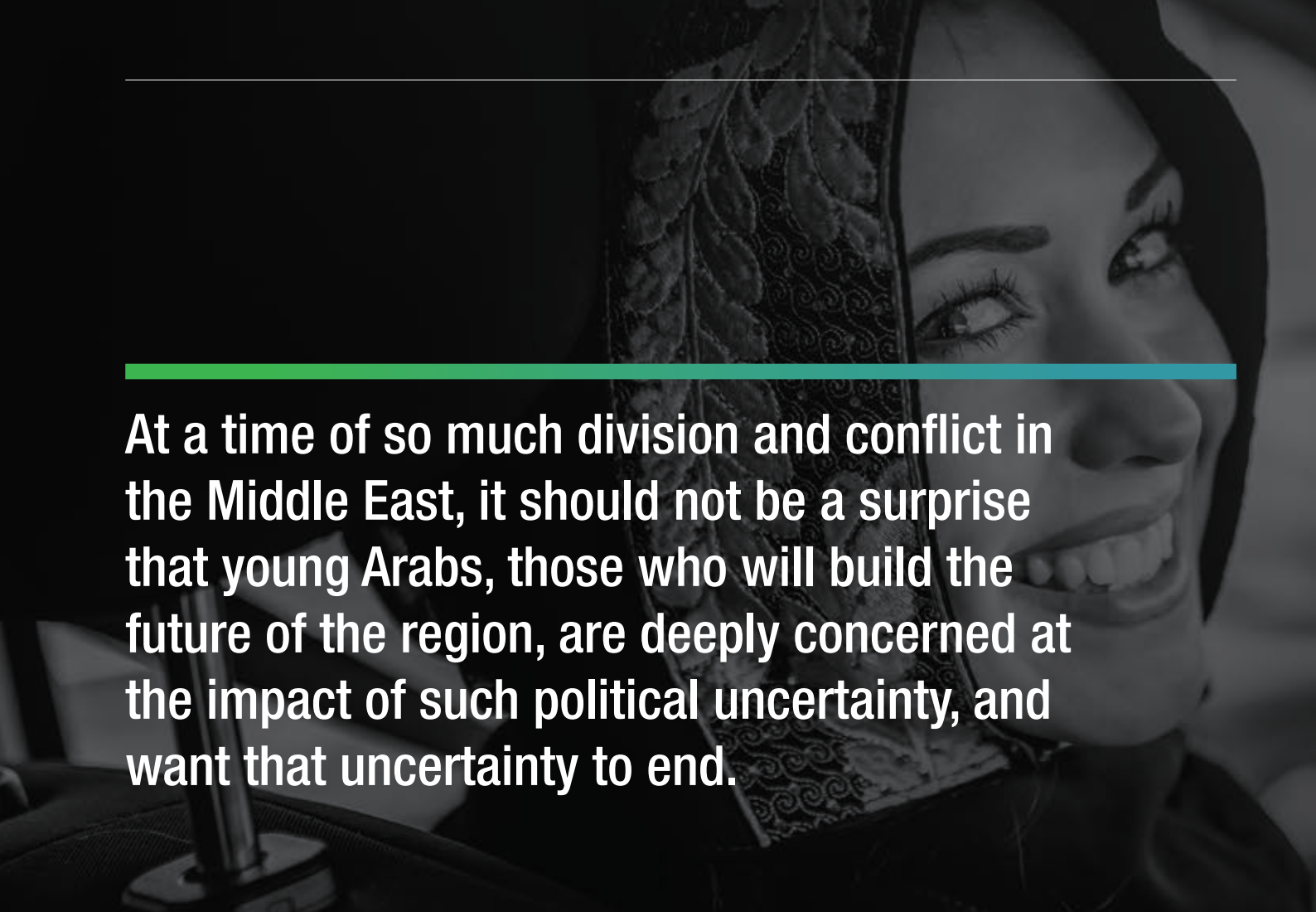
Small wonder, then, that one of the findings of the Arab Youth Survey is the belief among young Arabs that it is time to put an end to regional conflicts, regardless of how those conflicts conclude. The price of peace, according to those surveyed, is worth it.

That ought not to be surprising. The Middle East is overwhelmingly young – at least 65 per cent of the population is under the age of 30 – and their concerns are the concerns of youth: how to build futures, families and careers. Those goals require stability and certainty: the stability that encourages individuals to invest their money and energy in businesses and careers, and the certainty that sudden political upheaval won't scatter their families and upend all they have built.

A certain political fatigue, after so many years of conflict and political changes, is to be expected. Nowhere is this more apparent than in Syria's civil war, where the survey's findings suggest strongly that an end to the conflict, regardless of the political outcome, is the preferred view of young Arabs. After eight years of brutal conflict, with millions displaced and a civilisation in ruins, it is no wonder that so many Arabs simply want the war to end.

Given two options – that the war should not end until free elections could be held, or that the war should end regardless of whether Bashar Al Assad stayed in power – young Arabs overwhelmingly (73 per cent) chose the latter.

Intriguingly, those numbers remained consistent across the region, with Arabs in the Levant, which has disproportionately borne the brunt of the war, responding in similar numbers (73 per cent) to those in North Africa (70 per cent), which is slightly removed from the conflict.



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## At a time of so much division and conflict in the Middle East, it should not be a surprise that young Arabs, those who will build the future of the region, are deeply concerned at the impact of such political uncertainty, and want that uncertainty to end.

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Yet the apparent political fatigue of young Arabs is not merely about ending conflicts; it is also about building futures.

Look again at the top obstacles facing the Middle East as identified by young Arabs and while geopolitical conflicts rank in the top ten, the top two obstacles, by a considerable margin, are the rising cost of living (56 per cent) and unemployment (45 per cent), with slow economic growth as the fourth issue.

These are bread-and-butter political issues and they are at the heart of every society, not only in the Middle East but across the world. Young people everywhere want to look forward and build their futures and they are quick to identify the barriers that stop them doing so.

In fact, all of the other findings on this topic can be seen in that light, as creating barriers to the progress of some young Arabs.

The concern young Arabs have over the Palestinian-Israeli issue; fears over terrorism; and an uptick in fears that relations between Sunni and Shia

communities are getting worse; all are issues that could hinder political stability and economic growth.

The last of these – tensions between Sunni and Shia communities – is particularly interesting. This Arab generation, those who came of age after the invasion of Iraq in 2003, must be the first for a long time for whom divisions between Sunnis and Shias were so central to their societies.

And those sorts of divisions are incredibly dangerous in countries as mixed as many in the Middle East. Most of the Arab republics – Lebanon, Syria, Iraq and Yemen – have significant Shia populations and in all there have been long histories of mixed marriages. Against that background, tensions between communities can mean the destruction of families and businesses. The tensions between Sunnis and Shias have, mainly for political reasons, become violent in a number of countries, but the findings suggest that even low-level tensions can be detrimental to the society, and therefore a barrier to progress for young Arabs.

The “Lack of Arab unity” finding, identified as the number three obstacle facing the region, is intriguing and merits further investigation. It could refer to any of the current splits within the broader Arab world: the Saudi-led diplomatic crisis with Qatar, divisions between Lebanon and Syria over the Syrian civil war, or a lack of unity over the Israeli occupation of Palestinian lands. But all create obstacles to what ought to be collegiate, and mutually beneficial, relations between Arab countries, something that particularly the young, who are more likely to travel for work or education, are wary of.

At a time of so much division and conflict in the Middle East, it should not be a surprise that young Arabs – those who will build the future of the region – are deeply concerned at the impact of such political uncertainty, and want that uncertainty to end. Living in interesting times gets tedious. If the youth of the Arab world want to put the conflicts of the Arab world behind them, it is so they can start to look forward to their futures.



# MODEL NATIONS

For the eighth year running, the UAE continues its surge as the Arab youth's top country to live in and to emulate

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

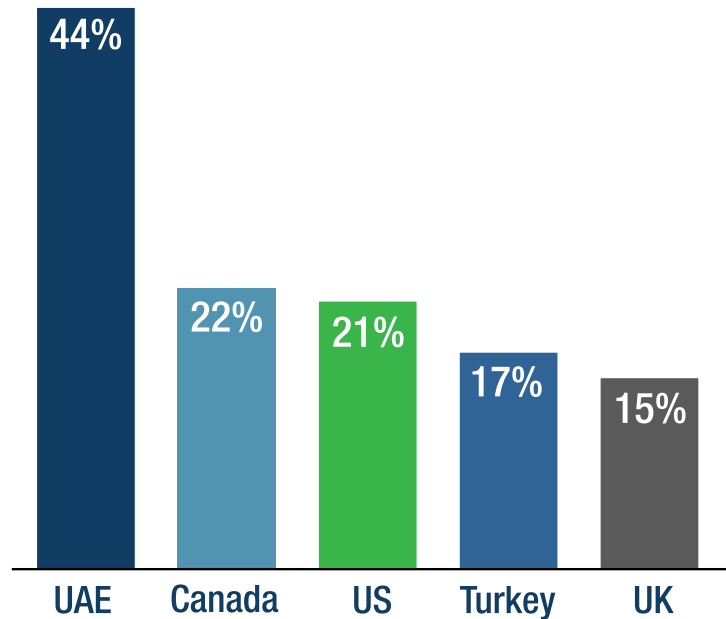
In 2019, the UAE has pulled ahead of other nations, with Canada, the next most popular nation, on 22 per cent, the US on 21 per cent, Turkey making its first appearance in the top five since 2013, on 17 per cent and the UK on 15 per cent.

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

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

## THE UAE IS THE TOP MODEL NATION TO LIVE IN FOR THE EIGHTH YEAR RUNNING WITH TWO IN FIVE YOUNG ARABS SAYING THEY WOULD LIKE TO LIVE IN THE UAE

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

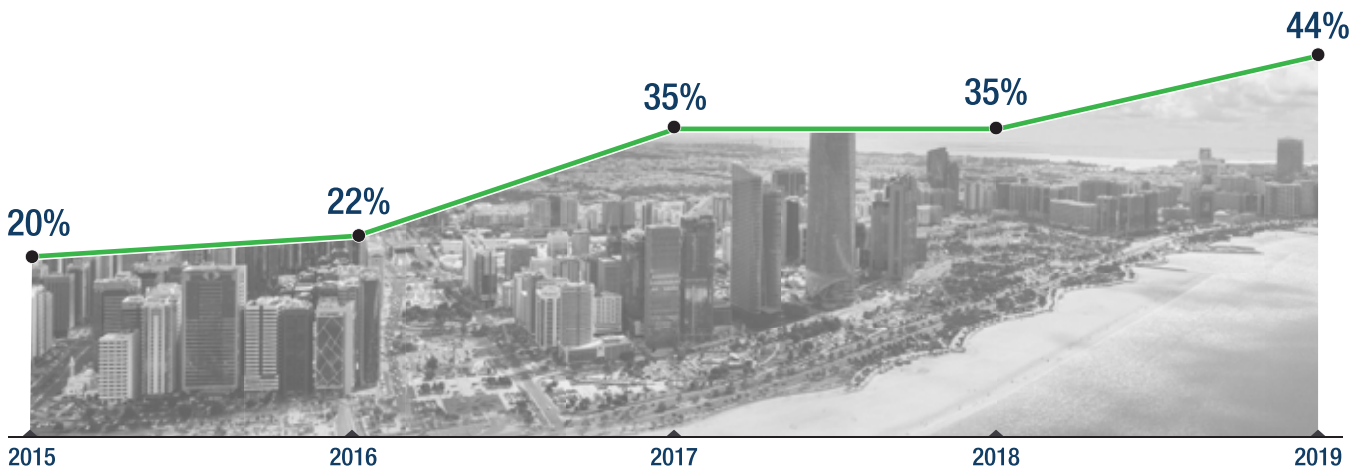


### Top five countries to live in

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

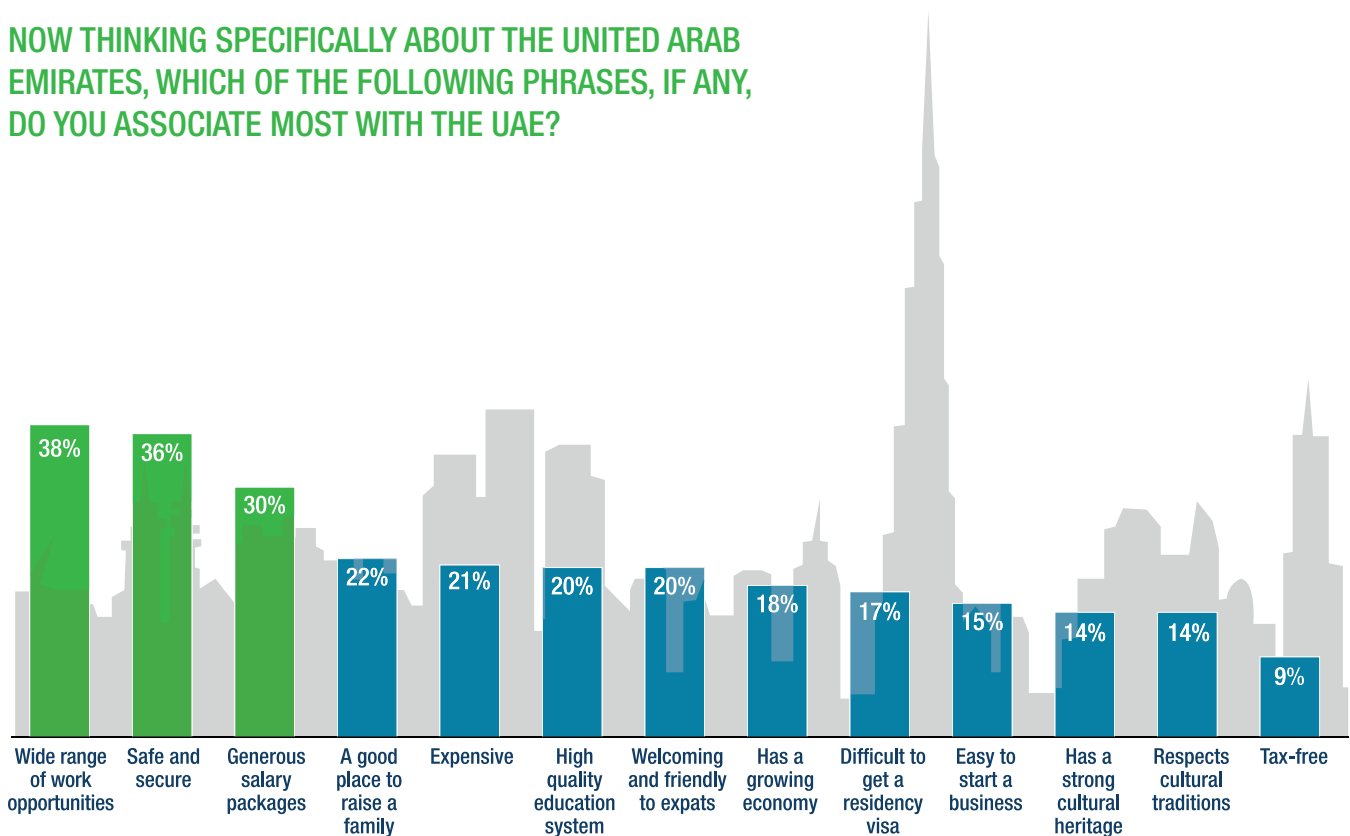
## PERCEPTIONS OF THE UAE AS THE BEST COUNTRY TO LIVE IN HAVE SURGED OVER THE PAST FIVE YEARS

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



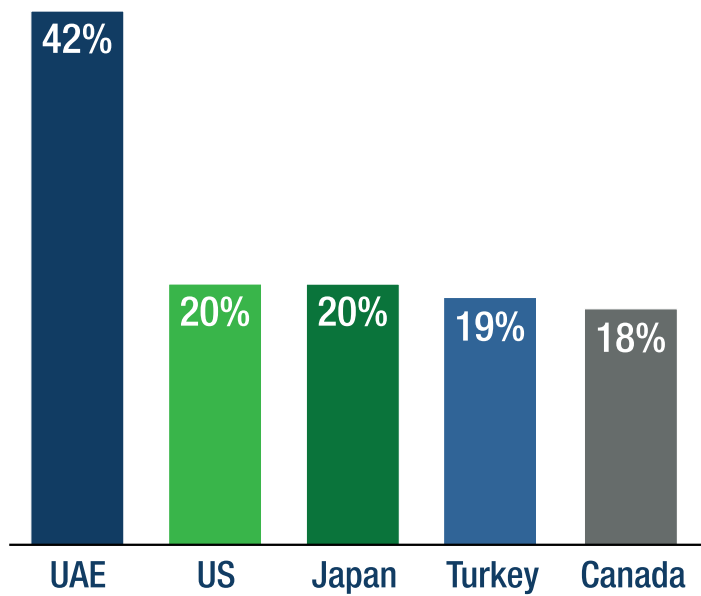
## YOUNG ARABS ARE DRAWN TO THE UAE BY JOB OPPORTUNITIES AND SALARY PACKAGES, AS WELL AS SAFETY AND SECURITY

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



**THE UAE ALSO REMAINS THE COUNTRY YOUNG ARABS WOULD LIKE THEIR COUNTRY TO EMULATE, FAR SURPASSING ANY OTHER ARAB OR WESTERN COUNTRY**

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



**Top five countries to emulate**

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

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# UAE ENJOYS THE DIVIDENDS OF EMBRACING GLOBAL VALUES AND AN OPEN, TOLERANT CULTURE

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Sunil John is the President - Middle East and Founder of ASDA'A BCW, the region's leading PR consultancy. He is on the global board of BCW (Burson Cohn & Wolfe) a top three global PR agency. He also leads Proof Communications, a specialist design and digital marketing firm, and PSB Research ME that offers polling and research-based consultancy for campaigns in the region. Sunil has been the driver behind the annual ASDA'A BCW Arab Youth Survey, a unique thought leadership initiative started in 2008 and, today, one of the most widely cited pieces of public opinion research on the region by media and policymakers around the world.

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## Sunil John

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For more than ten years now, the ASDA'A BCW Arab Youth Survey has documented the turbulence and transformation of the Middle East, from the perspective of youth living through changing times. For eight of those years, however, one finding has been constant, that the United Arab Emirates is the country most young Arabs would like to live in, and would most like their own to emulate.

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**It is not just that the UAE is increasingly embracing tolerance, it's that in doing so, the Emirates is going against the current change sweeping across the region - and much of the world, for that matter - where we see nationalism on the rise. Here, we see a push towards openness, tolerance and co-existence.**

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Indeed, in 2019, the UAE's standing hasn't just held its ground - it has positively surged, with 44 per cent of young Arabs saying they'd like to live in the UAE, more than double the number who picked the Emirates in 2012, and twice as many who picked this year's distant runner up, Canada.

The United Arab Emirates has established itself as a successful national model from the region, and one of the few success stories in the Middle East.

The headline reasons for the UAE's popularity have also stayed constant - stability and security in a troubled part of the world, and well-paid job opportunities in a region that infamously fails to provide enough are the key ones - but do they really account for that surge we see since 2012? After all, North America and Western Europe would be more obvious models, with similar benefits, one would think.

I think there's more to it. The growth in popularity over the past eight years is really down to the UAE's success in achieving a vision, articulated by the leadership many years ago, of becoming a model country, not just in the Middle East, but globally - and a model country with a specific appeal to youth.

Today, the UAE is measured not only by the traditional parameters of progress and prosperity, but the benefits of its growing soft power in the global community. The UAE is enjoying the dividends of embracing global values and an open, tolerant culture.

2019 is the year where we can see so much of that effort bearing fruit.

Take, for example, the UAE's desire to be an innovation hub and a place for business: this is the year that Careem - a Dubai-born challenger to Uber's crown in the region - was bought by its Silicon Valley rival for \$3.1 billion. Arab entrepreneurs can't fail to be impressed when they look at the can-do / go-for-it society that nurtured Careem and other unicorns from start-up to sale. Where else in the Middle East would you even consider a serious start-up?

If that wasn't enough, the UAE is relaxing its residency rules and is now rewarding the brightest and best expat talent with extended 10-year visas, with entrepreneurs, STEM talent and other future-focused specialists particularly sought after.

And, while culture is relatively low down on the priorities for the pragmatic youth we surveyed this year, there's no doubting that the UAE has grabbed headlines through its ambitious, and impressive, cultural development - something young people in the region can't have failed to notice.

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## The growth trend over the past eight years is really down to the UAE's success in achieving a vision, articulated by the leadership many years ago, of becoming a model country, not just in the Middle East, but globally – and a model country with a specific appeal to youth

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Witness the opening of the Louvre in Abu Dhabi, the Dubai Opera, and of stalwart headliners like Art Dubai – all bringing the best curators, artists and performers to the UAE.

This journey has culminated this year in a celebration of the country's most admirable trait: tolerance. The UAE's declared Year of Tolerance 2019 is not even near the half-way mark as I write this, and just look at what has been witnessed so far.

The visit of Pope Francis to Abu Dhabi in February – the first by a Pontiff to the Arabian Peninsula – was a truly historic occasion. It was followed, just one month later, by the Special Olympics World Games, also in Abu Dhabi, one of the largest sporting events on the planet, one that raised the bar for inclusion, shattered taboos and brought people with intellectual disabilities into the spotlight in the Middle East in a way that would have been deemed impossible just a decade ago.

It is not just that the UAE is increasingly embracing tolerance, it's that in doing so, the Emirates is going against the current change sweeping across the region – and much of the world, for that matter – where we see nationalism on the rise. Here, we see a push towards openness, tolerance, and co-existence.

These two showpieces of tolerances – religious and social – can't help but position the UAE as a nation that is wielding its immense soft power for good; something that must be refreshing for all youth to witness.

Through these initiatives, young Emiratis must feel themselves to be true global citizens. Indeed, the standing of the Emirati passport, now the world's most powerful, is testament to the UAE's ambitions to ensure its citizens stand proud with global peers. With Arab youth around the region looking to their governments for support, the UAE is truly a shining city on the hill.

And this takes me to the last, and most important point. Youth value the UAE because the UAE has always valued youth – wherever they hail from. The UAE cabinet has a Minister for Youth Affairs and other young, inspiring ministers include those for Artificial Intelligence, Food Security, Advanced Science, and Happiness. The country puts huge emphasis on education, with a focus on preparing youth – both citizen and resident – for the skilled, tech-focused careers of the future.

The success that the UAE has achieved so far is nothing short of remarkable and is celebrated the world over.

This global acclaim reflects a shift that has happened within the UAE's outlook and ambition; the country is no longer eyeing a leadership position within the region and has instead firmly set its sights on carving out its own international image and presence.

The UAE also plays a prominent role in regional and global affairs, and 93 per cent of youth in the Survey sample view the country as an ally, as seen in Finding 4.

The UAE regards success as a journey without an end. Nobody said it better, in fact, than His Highness Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE, Ruler of Dubai, who, in his book, *My Vision: Challenges in the Race for Excellence*, said: "The race for excellence has no finish line". Sheikh Mohammed set the tone for the progress that was to come next; with this approach, this commitment to success, and this ambition that goes beyond country or region, it is little surprise that the UAE is the destination of choice for youth across this region.





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# 7

## DRUG USE

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

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

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

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

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

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

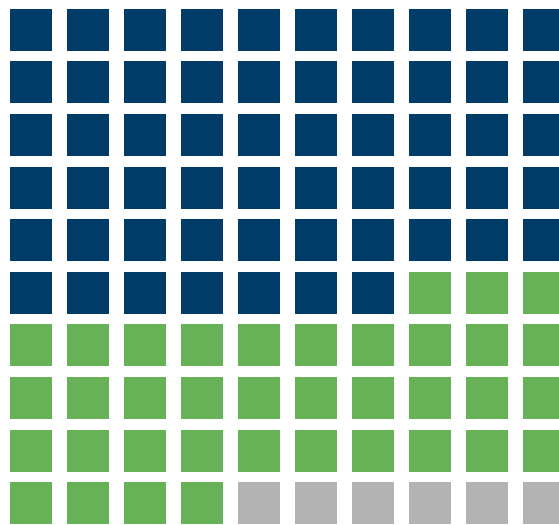
Better education and awareness of the negative effects of drugs was seen as the best route by 54 per cent of young Arabs, while more rehabilitation and counselling was seen as the answer by 50 per cent.

## YOUNG ARABS, PARTICULARLY IN THE LEVANT AND NORTH AFRICA, SAY DRUGS ARE EASY TO GET IN THEIR COUNTRY

### WHICH OF THE FOLLOWING IS CLOSER TO YOUR OPINION?

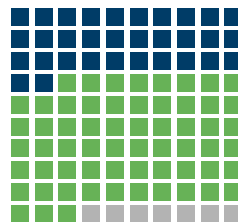
All respondents

57%



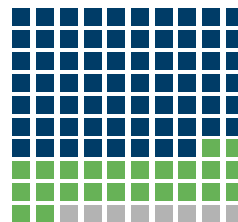
GCC

32%



North Africa

68%



Levant

70%



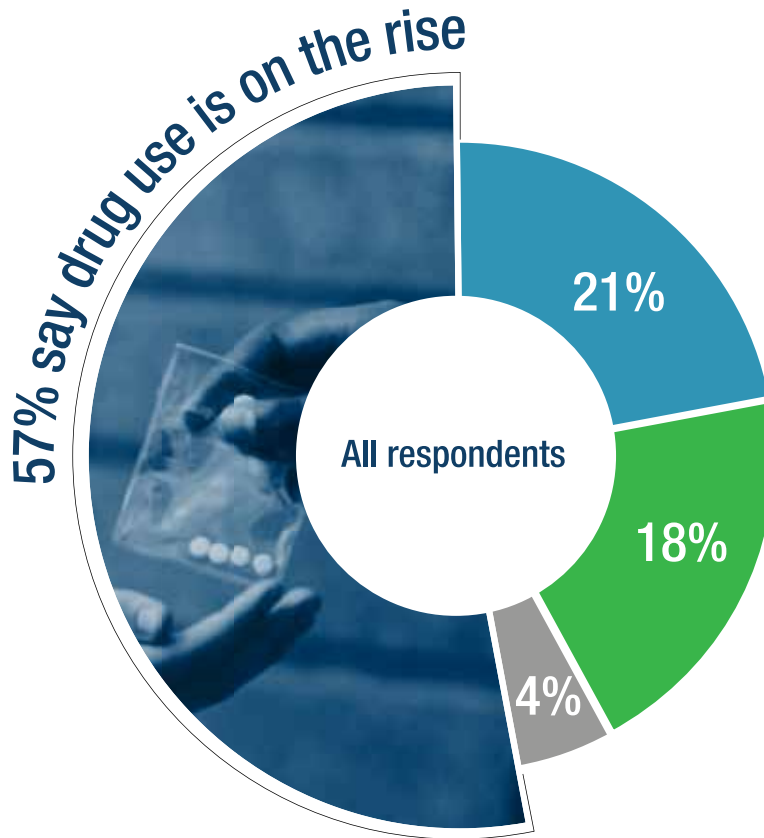
■ Drugs are easy to get in my country

■ Drugs are difficult to get in my country

■ Don't know

**MANY YOUNG ARABS, ESPECIALLY IN THE LEVANT, SAY DRUG USE AMONG YOUTH IS ON THE RISE IN THEIR COUNTRY**

**WHICH OF THE FOLLOWING IS CLOSER TO YOUR OPINION?**



**GCC**



**North Africa**



**Levant**



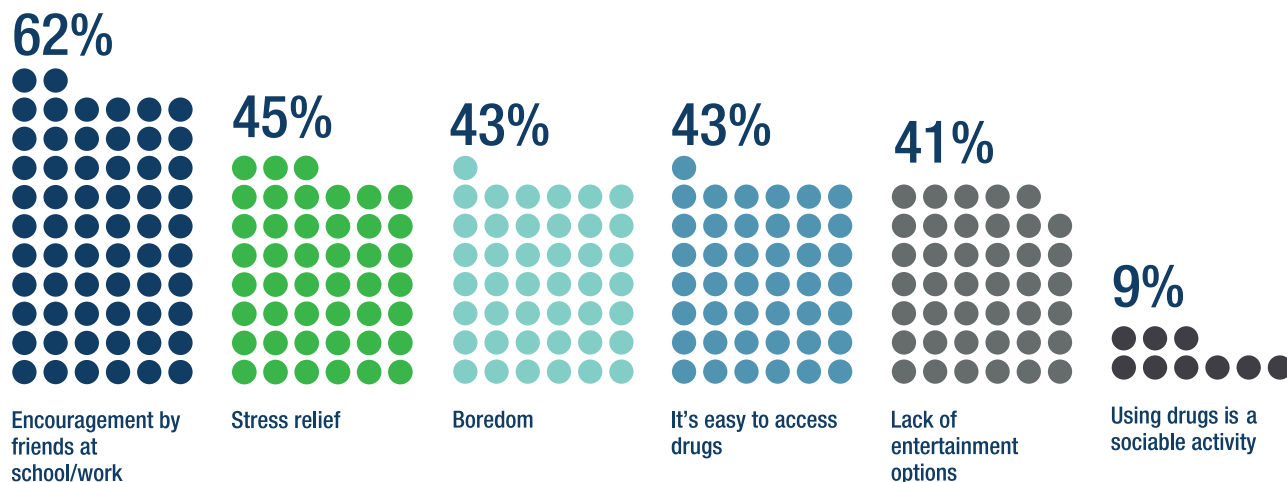
- The number of young people using drugs is on the rise
- Staying the same
- The number of young people using drugs is declining
- Don't know

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

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### WHY DO YOU THINK YOUNG PEOPLE START USING DRUGS?

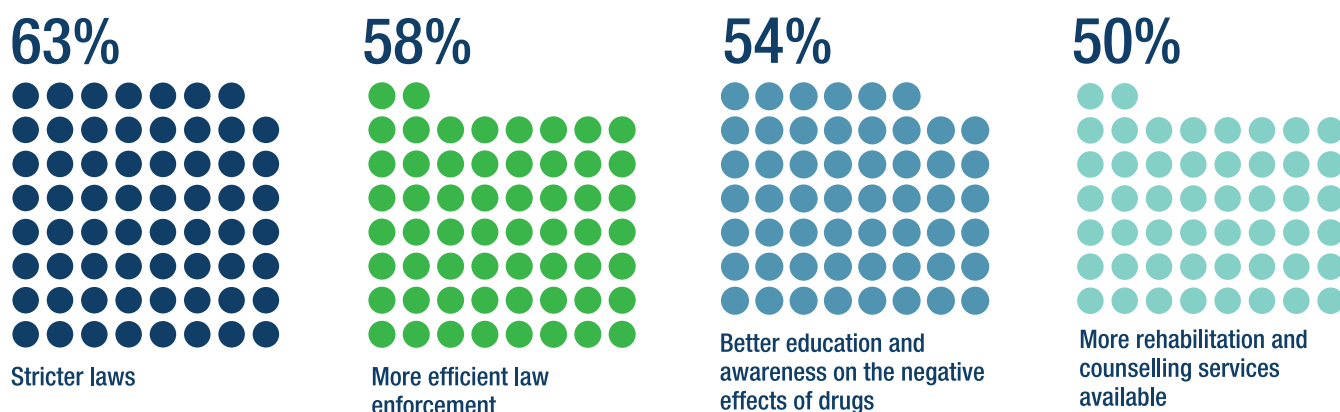


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## STRICTER LAWS, BETTER LAW ENFORCEMENT AND EDUCATION ARE SEEN AS THE BEST WAYS TO COMBAT DRUG USE

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### WHICH ARE THE BEST WAYS TO REDUCE DRUG USE IN YOUR COUNTRY?



# ACTION NEEDED TO TACKLE RISING DRUG USE AMONG ARAB YOUTH



Osama Al-Sharif is a veteran journalist and political commentator from Amman, Jordan. Educated in the US and Britain he has published a number of newspapers and magazines in Jordan and edited leading Arabic and English language dailies in Amman, Sharjah and Abu Dhabi. In the mid-1990s he co-founded and managed Arabia.com, the Arab world's first portal. In 2004 he was appointed to the Royal Commission for the National Agenda in Jordan where he drafted the media law. Currently he contributes political analysis on the region to *Gulf News*, *Arab News*, *Jordan Times* and the *Middle East Institute*.

## Osama Al Sharif

One of the most disturbing findings in this year's ASDA'A BCW Arab Youth Survey is the one concerning the rise in drug use among Arab youth. A majority of those surveyed, 57 per cent, said that they believed the number of young people using drugs in their country is on the rise. This was especially evident among youth in the Levant, where 76 per cent said drug use was increasing, and North Africa (59 per cent), while less so among GCC youth, where just over a third (36 per cent) thought drug use was on the rise.

**While countries must work together to fight international enablers of drug use – the drug cartels and cross-border smugglers – they need to prioritise short and long term solutions to stem the rise in drug use among young people.**

The figures on use correlate with accessibility; in the GCC, just 32 per cent

of youth say that drugs are easy to get, compared with 68 per cent for North Africa and 70 per cent for the Levant.

While most countries have strict laws targeting both criminals who engage in illegal distribution and, to a lesser extent, those who abuse drugs, the fact remains that there are few studies which show conclusively how to deal with the issue. Stricter laws are not enough to overcome this challenge – there is an urgent need to look at this problem from a social, economic and even political angle.

Moreover, this is a global challenge and no country can deal with the challenge of drug abuse on its own. Each country and sub-region represents a special case, and the factors contributing to the rise in drug use in Jordan, for example, differ from those faced by the UAE.

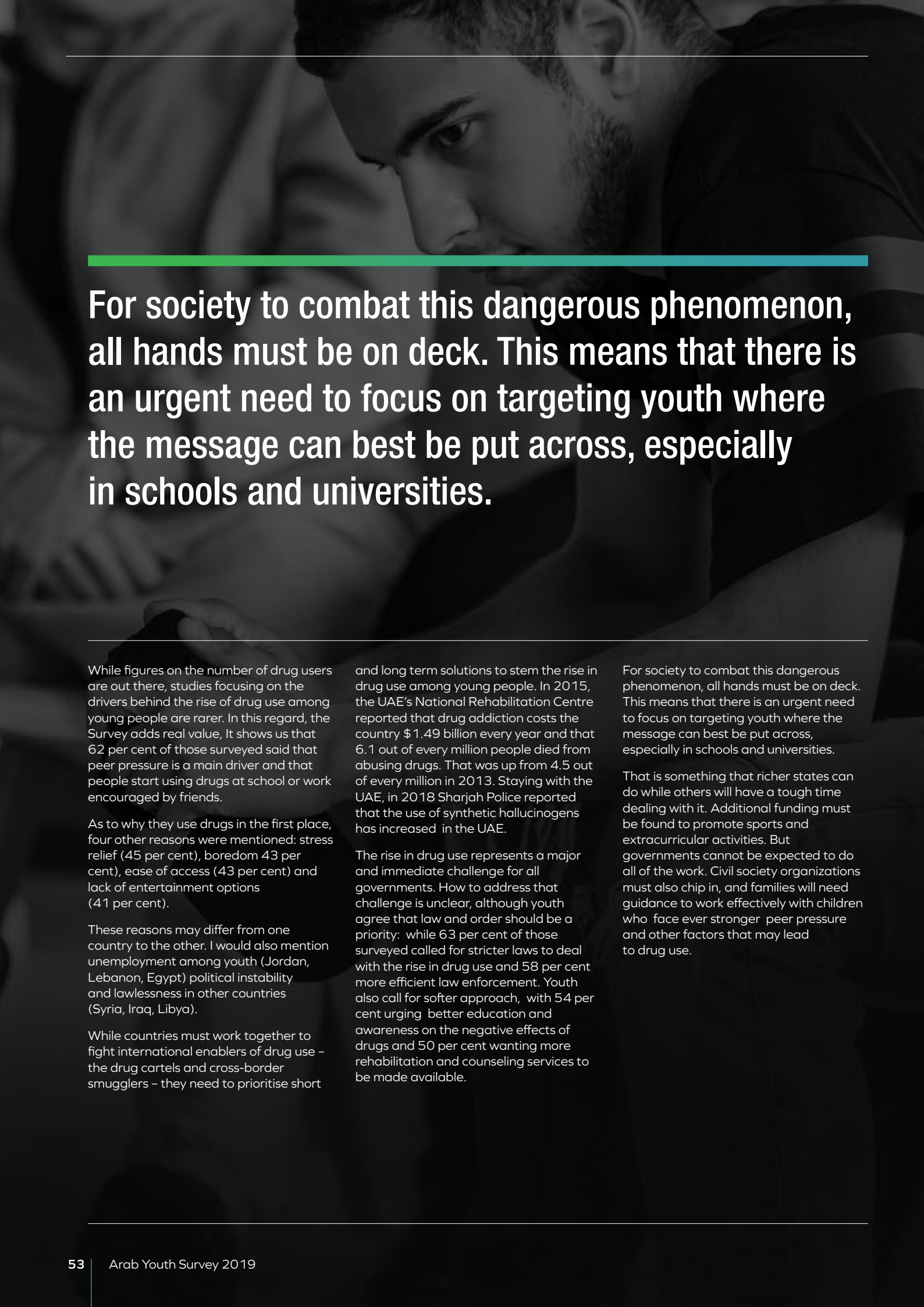
The ASDA'A BCW Arab Youth Survey findings back up other studies into drug use in the region. One such study found that drug use in Jordan had risen by 32 per cent in 2018 compared to the previous year. This is a distressing statistic,

and one which should have set alarm bells ringing in the kingdom. Looking further at the Jordanian case one finds that, over the years, Jordan has moved from being a gateway or transit for illegal drug smuggling to nearby countries, into a destination for drug use and even a manufacturer.

Other studies have shown that prescription drug abuse is on the rise among young people in poor areas of the capital Amman. There is now a real problem of drug addiction in the kingdom, requiring a deeper look into the causes and possible remedies.

Last year, Egypt's Ministry of Social Solidarity said that the rate of drug addiction in Egypt had reached 10 per cent (9.6 million people) – double the global average. A report by the ministry found nearly 8 per cent of high school students abused drugs, while a study in 2017 by Egypt's Fund for Drug Control and Treatment showed that 10 per cent of drug users are children or youth within the 12-19 age group.

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## For society to combat this dangerous phenomenon, all hands must be on deck. This means that there is an urgent need to focus on targeting youth where the message can best be put across, especially in schools and universities.

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While figures on the number of drug users are out there, studies focusing on the drivers behind the rise of drug use among young people are rarer. In this regard, the Survey adds real value. It shows us that 62 per cent of those surveyed said that peer pressure is a main driver and that people start using drugs at school or work encouraged by friends.

As to why they use drugs in the first place, four other reasons were mentioned: stress relief (45 per cent), boredom (43 per cent), ease of access (43 per cent) and lack of entertainment options (41 per cent).

These reasons may differ from one country to the other. I would also mention unemployment among youth (Jordan, Lebanon, Egypt) political instability and lawlessness in other countries (Syria, Iraq, Libya).

While countries must work together to fight international enablers of drug use – the drug cartels and cross-border smugglers – they need to prioritise short

and long term solutions to stem the rise in drug use among young people. In 2015, the UAE's National Rehabilitation Centre reported that drug addiction costs the country \$1.49 billion every year and that 6.1 out of every million people died from abusing drugs. That was up from 4.5 out of every million in 2013. Staying with the UAE, in 2018 Sharjah Police reported that the use of synthetic hallucinogens has increased in the UAE.

The rise in drug use represents a major and immediate challenge for all governments. How to address that challenge is unclear, although youth agree that law and order should be a priority: while 63 per cent of those surveyed called for stricter laws to deal with the rise in drug use and 58 per cent more efficient law enforcement. Youth also call for softer approach, with 54 per cent urging better education and awareness on the negative effects of drugs and 50 per cent wanting more rehabilitation and counseling services to be made available.

For society to combat this dangerous phenomenon, all hands must be on deck. This means that there is an urgent need to focus on targeting youth where the message can best be put across, especially in schools and universities.

That is something that richer states can do while others will have a tough time dealing with it. Additional funding must be found to promote sports and extracurricular activities. But governments cannot be expected to do all of the work. Civil society organizations must also chip in, and families will need guidance to work effectively with children who face ever stronger peer pressure and other factors that may lead to drug use.



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# MENTAL HEALTH

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

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

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

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

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

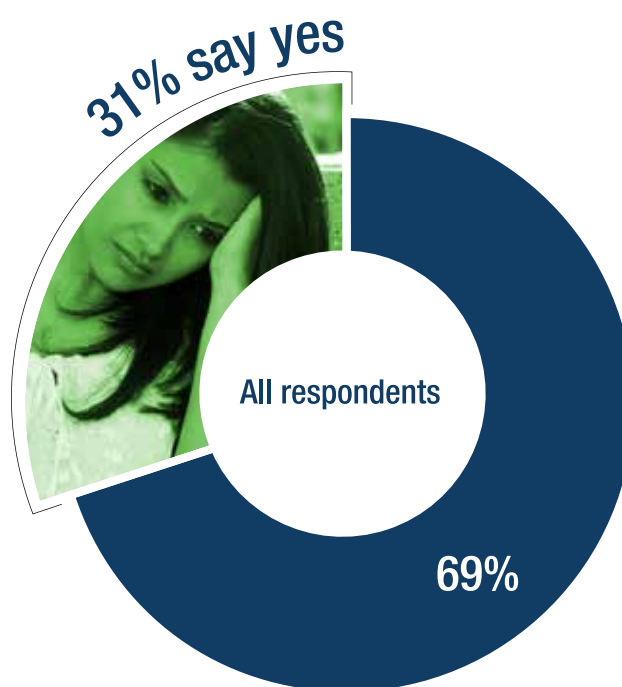
Youth in the GCC were most likely to be accepting of mental health issues, with 62 per cent saying these were a normal thing, against 36 per cent who said they could be viewed as negative. In North Africa, only one third (33 per cent) thought people viewed mental health issues as normal, against 65 per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

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

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

## ONE-THIRD OF YOUNG ARABS SAY THEY KNOW SOMEONE SUFFERING FROM MENTAL HEALTH ISSUES

### DO YOU KNOW ANYONE WHO IS SUFFERING FROM MENTAL HEALTH ISSUES, SUCH AS ANXIETY AND DEPRESSION?



#### GCC



#### North Africa



#### Levant



■ Yes ■ No

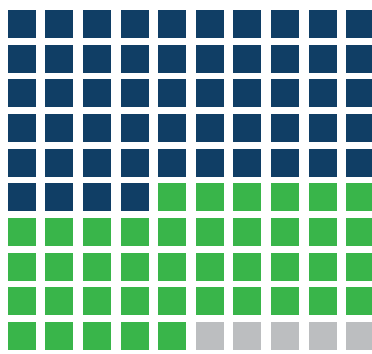


## A MAJORITY, PARTICULARLY IN THE LEVANT, SAY QUALITY MEDICAL CARE FOR MENTAL HEALTH ISSUES IS DIFFICULT TO ACCESS IN THEIR COUNTRY

HOW EASY OR DIFFICULT DO YOU THINK IT WOULD BE TO GET QUALITY MEDICAL CARE FOR MENTAL HEALTH ISSUES, SUCH AS ANXIETY OR DEPRESSION, IN YOUR COUNTRY?

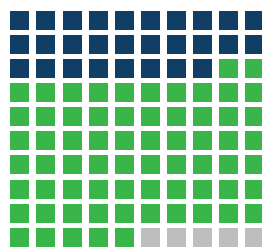
All respondents

54%



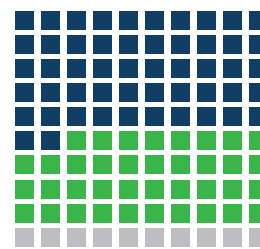
GCC

28%



North Africa

52%



Levant

81%

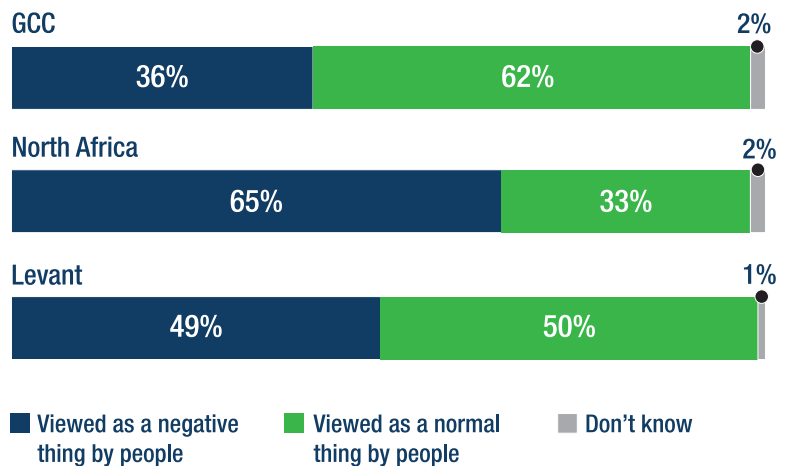
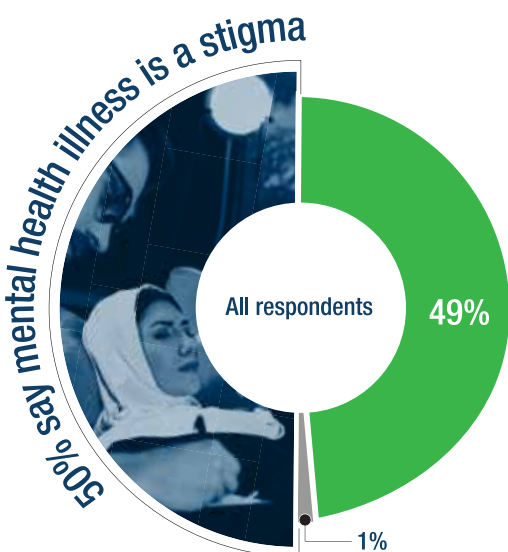


■ Difficult ■ Easy ■ Don't know

## HALF OF ARAB YOUTH SAY THERE IS A STIGMA AROUND SEEKING MEDICAL CARE FOR MENTAL HEALTH ISSUES

WHICH OF THE FOLLOWING IS CLOSER TO YOUR OPINION?

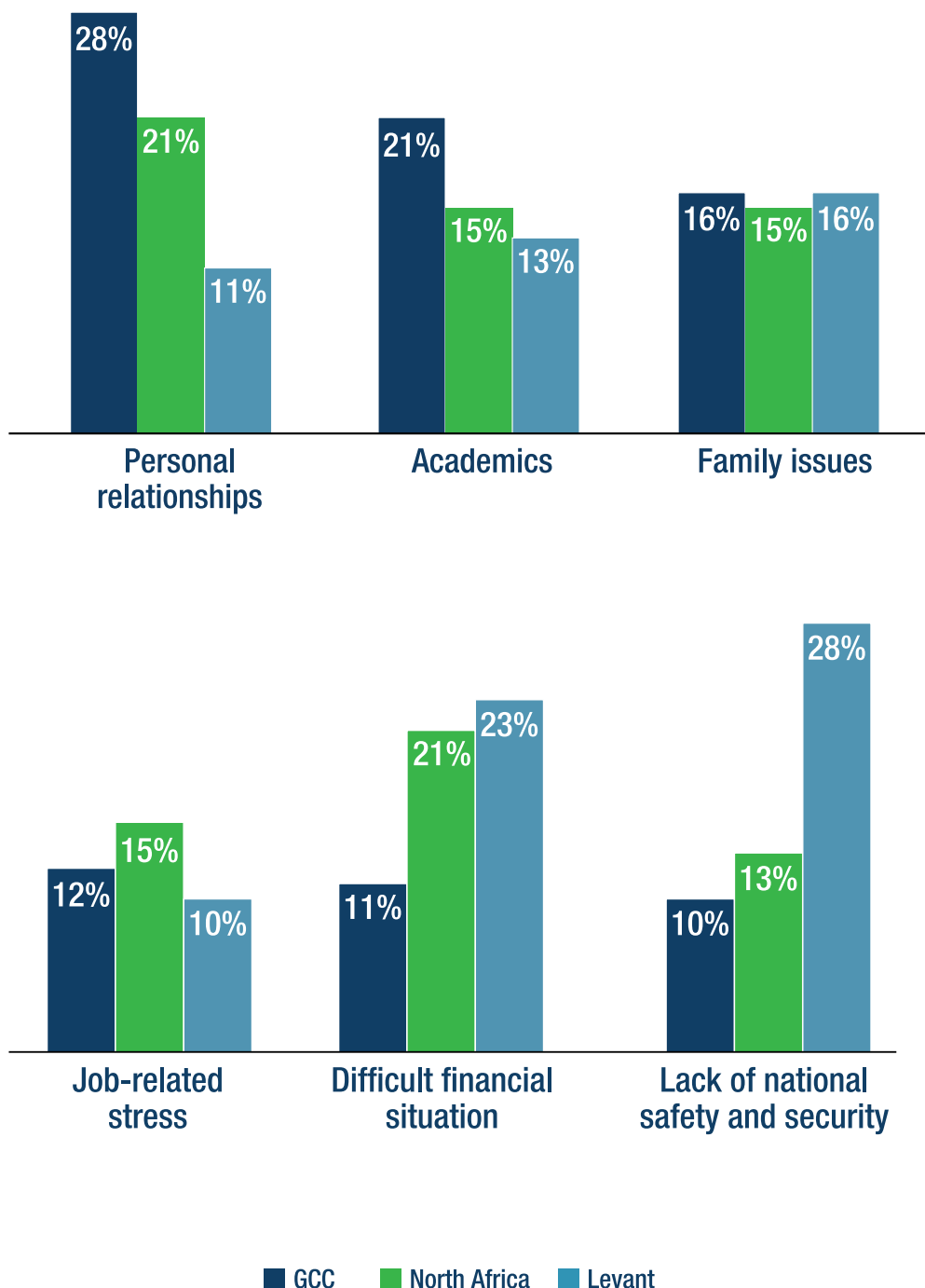
“In my country, seeking medical care for mental health issues, such as anxiety or depression, is...”



**WHILE PERSONAL RELATIONSHIPS ARE THE BIGGEST SOURCE OF STRESS AMONG YOUTH IN THE GCC, SAFETY AND DIFFICULT FINANCIAL SITUATIONS ARE THE TOP SOURCES OF STRESS IN THE LEVANT**

**WHICH OF THE FOLLOWING, IF ANY, IS THE BIGGEST SOURCE OF STRESS IN YOUR DAILY LIFE?**

(Ranked by GCC response)



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# ATTITUDES TO MENTAL HEALTH HAVE A HIGH COST FOR ARAB SOCIETY



Professor Justin Thomas is a Chartered Health Psychologist with the British Psychological Society and Professor of Psychology at Zayed University in Abu Dhabi, where he directs the Research Cluster for Culture, Cognition and Wellbeing. He earned his PhD in experimental psychology from the University of Manchester. Justin publishes extensively on topics related to culture and psychopathology. His most recent book is *Psychological Wellbeing in the Gulf States: The New Arabia Felix*. Justin also works to promote the public understanding of psychological science, writing extensively for the popular press, making regular media appearances and giving public lectures and workshops.

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## Justin Thomas

The ancient Romans, with a green tinge of envy in their eyes, referred to parts of the Arab world as Arabia Felix – happy Arabia. To what degree the people of ancient Arabia were happy is wide open to speculation, so too is the extent to which they experienced enduring sadness, anxiety and other types of emotional distress we consider symptomatic of mental health issues.

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**People will often exclude or ridicule individuals known to have experienced mental health issues. Some people might fear disgrace-by-association, even when the sufferer happens to be a member of their own family. In close knit collectivist societies, the stigma can extend from the individual to tarnish the whole family.**

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We do know, however, that the oldest existent manuscript devoted entirely to depressive illness comes from the Arab world: Maqaal 'ala malaakhoolia (Treatise on Melancholy) was penned by Ishaq ibn Imran, an Arab-Iraqi physician working in 10th century Tunisia.

This marvellous work leaves us with no doubt that mental health issues – conditions that we might today call depression or bipolar disorder – were prevalent in the Arab world. Furthermore, it shows us that they were viewed, at least by some, as treatable psychological complaints rather than demonic possession, irreligiosity or weak-willed malingering.

This year's Arab Youth Survey included a section devoted to exploring young people's perceptions of mental health issues in the Arab world today. This focus is timely because, despite remaining widely underreported, mental health problems have reached epidemic proportions in many nations. The World Health Organisation estimated that 1.1 billion people around the world endured a mental health problem in 2016.

The cost associated with mental illness is presently the largest of any health issue, projected to reach \$6 trillion per year by 2030.


The 2019 Arab Youth survey reports that almost one-third of respondents personally know somebody who is experiencing a mental health issue.

This finding resonates with the large global epidemiological studies, many of which have included sections of the Arab world. For example, the data from the 2010 Global Burden of Disease study identified the United Arab Emirates as having a burden of depressive illness above the global mean. The term "burden" comes from health economics and refers to the economic impact associated with a health complaint, for example, lost workforce productivity and treatment costs. Problems that have an early age of onset (affect youngsters) and a chronic course (last a long time) are particularly burdensome from an economic standpoint. In short, depression costs way more than diabetes.

Half of the Arab youth surveyed saw help-seeking for mental health issues as being viewed negatively within their respective countries. The stigmatisation of people experiencing mental health issues is very real and, in spite of the many brave celebrity self-disclosures, it persists and will undoubtedly continue to endure for generations to come.

Stigma towards people experiencing mental health issues has an ugly past. Consider that mental health patients in

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## Problems that have an early age of onset (affect youngsters) and a chronic course (last a long time) are particularly burdensome from an economic standpoint. In short, depression costs way more than diabetes.

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Nazi Germany were deemed as having “lives not worth living”.

Robert Proctor, Professor of History at Stanford University, suggests that gas chambers were first used in psychiatric hospitals. German psychiatrists are estimated to have been complicit in the murder of some 70,000 mental health patients. In the US too, many thousands of people with mental health issues were subject to compulsory sterilisation, in line with the so-called “prevention of idiocy act”.

While most nations no longer attempt to exterminate or sterilise people with mental health issues, we do continue to shun, stigmatise, demonise and discriminate. The UK mental health Charity, Mind, has scoured the globe for examples, which range from Lithuanian laws excluding people with mental health issues from home ownership, to swimming pools in South Korea that restrict access based on mental health status. Until July 2013, having a documented mental health issue in the UK would prevent you from becoming a company director, and exclude you from jury service.

These are examples of stigmatisation and discrimination at the institutional level,

quickly fixed by changes to policy or law.

At the interpersonal level though, things can be far more painful and resistant to change. People will often exclude or ridicule individuals known to have experienced mental health issues. Some people might fear disgrace-by-association, even when the sufferer happens to be a member of their own family. In close knit collectivist societies, the stigma can extend from the individual to tarnish the whole family. In such a context, disclosing a mental health issue might cause social problems (e.g. reduced marriage prospects, employment opportunities) for other family members.

The culture of shame and stigma towards mental health problems radically reduces help-seeking behaviours. This is a real tragedy because, in many cases, getting help, early, can mean the difference between a quick and lasting recovery or a lifetime of languishing.

Of course, stigma is not the only reason people don't seek medical help for mental health issues. There is little point seeking help if there is none readily available, or if it is perceived as substandard. This is the issue of accessibility, to which 55 per cent of Arab youth responded negatively,

suggesting that access to quality mental health care was “difficult”.

The response to this question varied significantly by region, with 81 per cent of Levantine youth declaring access difficult.

With psychological therapies, which are often the most effective treatments for depression and anxiety, there is often a need to speak the language of the client and to have a proper appreciation of their cultural values. A broken leg is a broken leg in any language, but a broken heart is far more nuanced. Importing psychological therapists will not always be a viable option. There is a real need for home-grown therapists.

This means ensuring high-quality training and supervision for citizens and long-term residents interested in pursuing this career pathway. Improving access to high-quality care for mental health issues requires improving access to graduate-level training programs. This will ensure a steady supply of highly-skilled and culturally-competent mental health professionals capable of meeting national demand.



# E-COMMERCE

Young Arabs are driving the region's e-commerce boom

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

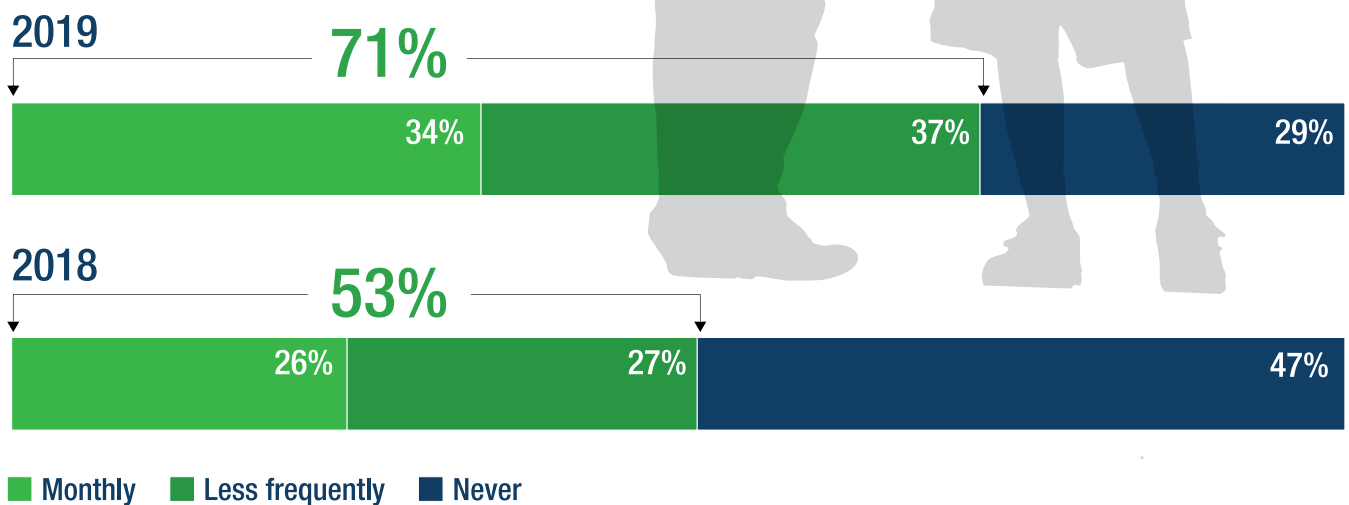
Of the types of goods and products purchased online, clothing was the most popular category at 47 per cent, followed by food (prepared meals) at 37 per cent, electronics (33 per cent), cosmetics (28 per cent), travel (flights or hotels) at 20 per cent, books (19 per cent), luxury goods (e.g. jewellery)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

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

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

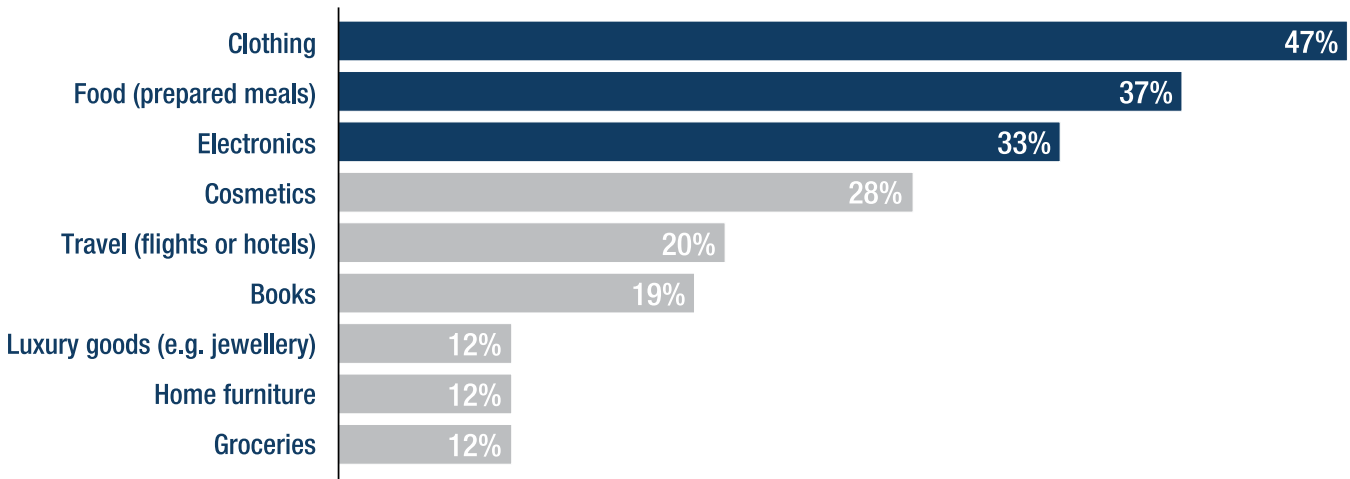
## THE NUMBER OF YOUNG ARABS SHOPPING ONLINE HAS SPIKED SIGNIFICANTLY OVER THE PAST YEAR

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



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

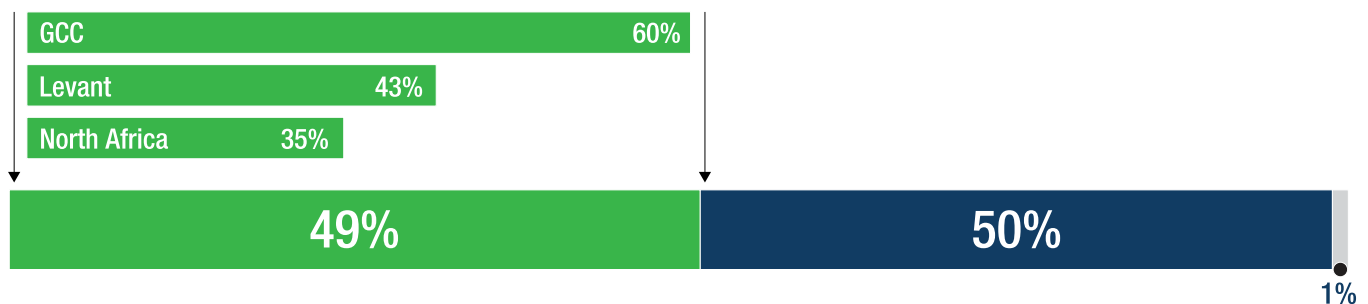
WHICH OF THE FOLLOWING PRODUCTS OR SERVICES, IF ANY, HAVE YOU PURCHASED ONLINE?



## HALF OF YOUNG ARAB ONLINE SHOPPERS, PARTICULARLY IN THE GCC, PREFER TO PAY BY CARD RATHER THAN CASH

WHEN SHOPPING ONLINE, WHICH PAYMENT METHOD DO YOU PREFER USING?

2019



2018



■ Credit/debit/pre-paid card 
 ■ Cash on delivery 
 ■ Don't know





# ARAB YOUTH AND THE REVOLUTION IN ONLINE RETAIL



Cyrille Fabre is a partner and director in Bain & Company's Middle East offices; he leads Bain's Retail, Consumer products and family businesses practice in the Middle East. Cyrille has more than 18 years management consulting experience and delivers strategies that work for leading retailers and consumer product companies. In addition, Cyrille works with economic development agencies to address topics such as retail sector strategies, food security and industrialization in the GCC region, and is a board member in several ecommerce start-ups. He holds an MBA from INSEAD/Wharton Business School.



Anne-Laure Malauzat is a principal in Bain & Company's Middle East office and an active member of the firm's Retail, Social & Public Sector practices. She has worked with a range of private sector clients in industries ranging from retail, consumer products, real estate, banking to pharmaceuticals and has led a number of projects for public sector organisations around national socio-economic development, vision planning, government transformation, education, entrepreneurship, and innovation. Anne-Laure holds a Master's from the School of Foreign Service at Georgetown University.

## Cyrille Fabre & Anne-Laure Malauzat

In the Arab world, the digital revolution has begun. Over the past 12 months, the percentage of youth shopping online spiked from 53 per cent to 71 per cent. While the penetration is still lower than in Western countries such as the UK (88 per cent), the pace of growth is remarkable.

**We are seeing progress on obstacles to growth. New entrants in e-commerce – either global giants investing in the region or local start-ups – are bringing more supply to the region. New technology, such as geo-localization and new business models are improving the performance of last mile delivery**

The truth is that, while Arab youth are one of the most digitally savvy demographics globally, the MENA e-commerce market remains under-developed.

Indeed, according to a recent study by Bain & Company and Google, the B2C e-commerce market for packaged goods (excluding automotive, food delivery and travel) in MENA amounted to \$8.3 billion in 2017. Thus, e-commerce only represents 1.9 per cent of total retail in MENA (4 per cent in the GCC), against 10-15 per cent in most developed markets.

Why is the MENA e-commerce market so small, despite 71 per cent of the youth shopping online? This is primarily due to the low frequency of purchase. While the average shopper in the US conducts 19 purchases online annually, MENA shoppers do so only two to four times a year.

This difference of frequency of purchase is due to three factors: one, the lack of supply and limited product selection in local websites; two, the relatively poor performance of the last mile delivery; and three, the lack of trust and prevalence of cash on delivery in the Arab world.

We are seeing substantial progress on each of these obstacles to growth. New entrants in e-commerce – either global giants investing in the region or local start-ups – are bringing more supply to the region. New technology such as geo-localization and new business models are improving the service levels of last mile delivery – for example, a company like *Get It* is capable of delivering a range of 1,000 items to anyone in Istanbul within an average of 10 minutes.

Regarding the lack of trust and prevalence of cash on delivery, traditionally one of the biggest challenges to the growth of e-commerce in the region, the ASDA'A BCW Arab Youth Survey 2019 reveals a slight shift in preference. Nearly half of youth in MENA (49 per cent as a whole and 60 per cent in GCC) now prefer card payment over cash on delivery.

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# The e-commerce market in MENA is set to reach \$28 billion, or 7 per cent of total retail, by 2022. E-commerce is not hype; it is a fundamental trend reshaping the retail industry globally, and the Middle East and North Africa is no exception.

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Clothing, meals, electronics and, to a lesser extent, beauty are the key drivers of e-commerce among young Arabs.

While these categories are also top-performing e-commerce categories globally, their ranking differs in the region.

The delivery of prepared meals is particularly well developed in the Middle East, with the Survey showing that 37 per cent of young people choose to order food online. As a result, in Saudi Arabia, delivery of prepared meals now accounts for 13 per cent of the entire food service industry and almost 30 per cent of fast food sales. This is the fourth highest penetration rate globally after Korea, Japan and the UK.

Beauty is also surprisingly developed, with 28 per cent adoption among the youth (i.e. almost 50 per cent of the women).

As a result, e-commerce now accounts for 11 per cent of total beauty retail in the GCC and Egypt, compared with only 9 per cent in the US. This is the one category where MENA penetration exceeds global benchmarks.

Moving forward, clothing, meals, electronics and beauty will remain essential, and e-grocery is expected to become much more prevalent than today. In 2017, e-grocery accounted for less than 1 per cent of total grocery. However, since then, several brick-and-mortar retailers have launched their own e-grocery solutions and many start-ups have entered the space.

The availability of products as well as the quality of the customer experience is slowly improving as retailers learn to master the challenges of online sales.

Innovative delivery models such as *Get It* and the development of 'drive thru' collection points will foster market growth. Further, e-grocery will account for 3 to 4 per cent of total grocery by 2022.

As a result of these trends, the e-commerce market in MENA is set to continue to experience fast growth – by as much as 25 or 30 per cent per year – to reach \$28 billion, or 7 per cent of total retail by 2022.

E-commerce is not hype; it is a fundamental trend reshaping the retail industry globally, and the Middle East is no exception.



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# MEDIA CONSUMPTION

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Among Arab youth, social media is more popular and seen as more trustworthy than traditional media

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

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

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

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

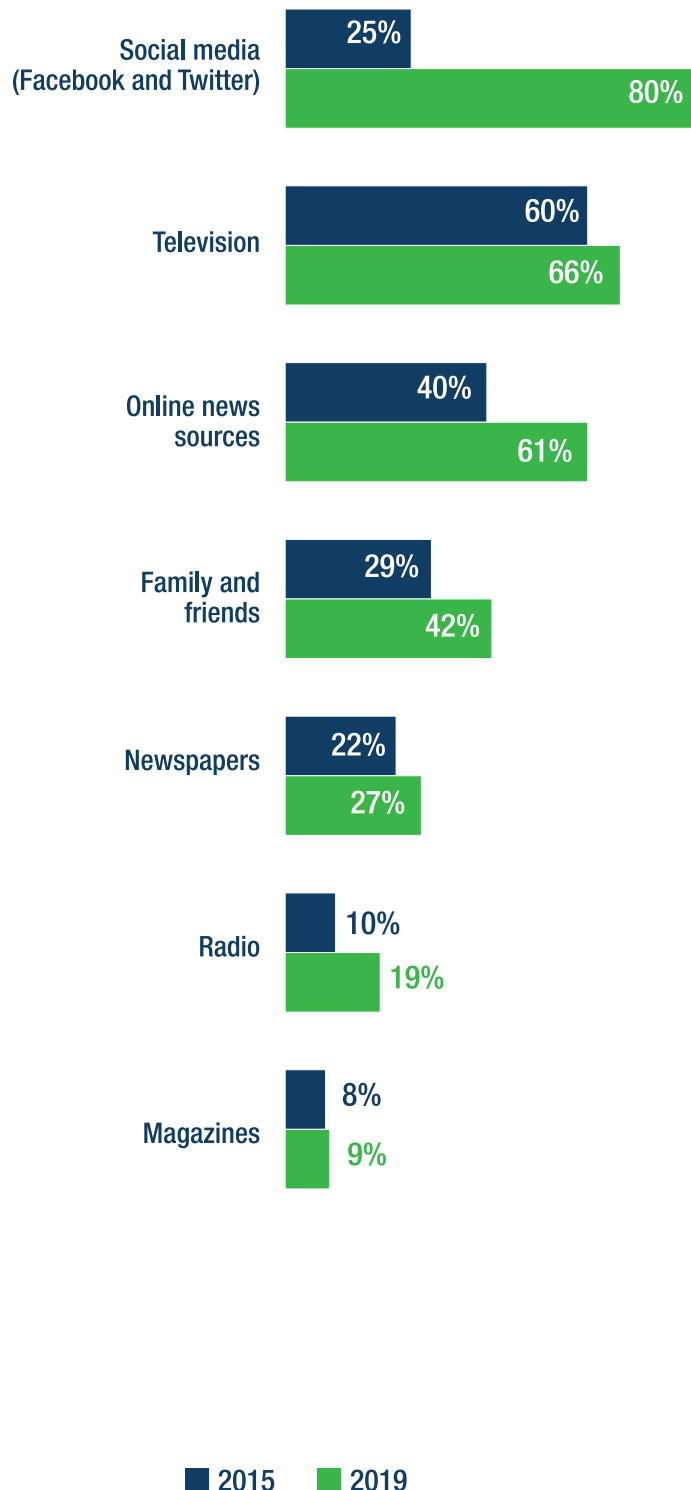
Social media is becoming ever more dominant in the lives of youth in the Middle East, with 9 out of 10 young Arabs using at least one of the major social media channels daily. WhatsApp is the preferred social channel in the GCC, with 96 per cent of respondents saying they used the messaging app daily.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

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

Asked which platform was the most important to them, youth in North Africa overwhelmingly selected Facebook (56 per cent) with WhatsApp a distant second at 19 per cent and both Twitter and Snapchat chosen by just 2 per cent. Facebook was also the most popular in the Levant (37 per cent) but trailed WhatsApp in the GCC, with the messaging platform on 30 per cent and Facebook on 20 per cent.

## OVER THE PAST FIVE YEARS, SOCIAL MEDIA HAS BECOME THE DOMINANT SOURCE FOR NEWS AMONG ARAB YOUTH, WHILE ONLINE NEWS PORTALS ARE NOW ON PAR WITH TV

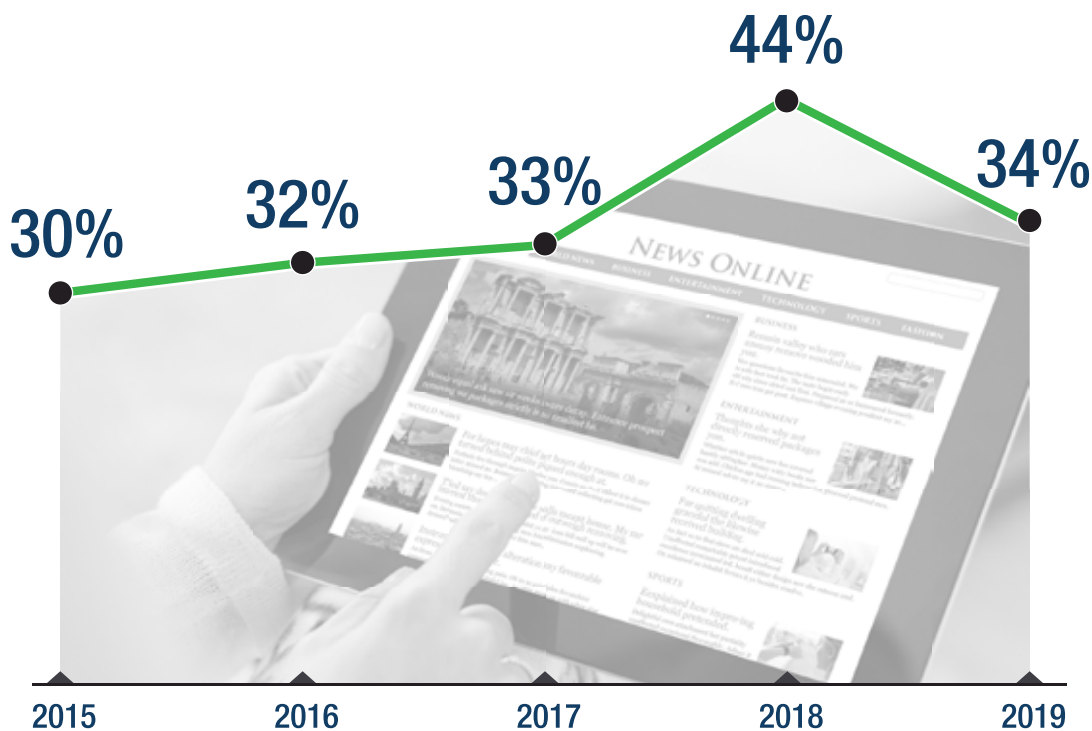
### WHERE DO YOU GET YOUR NEWS?



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

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

(Showing % 'Daily')



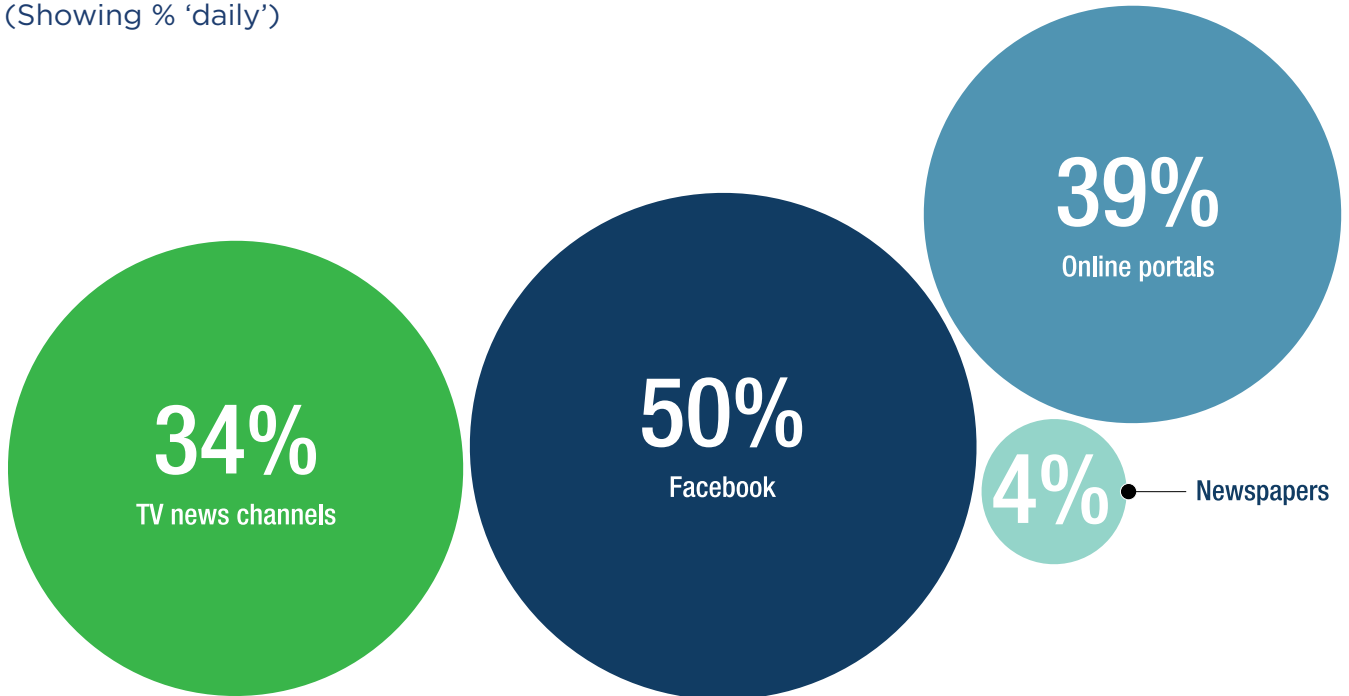
### Top news sources for informed Arab youth

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

## MORE YOUNG ARABS GET THEIR DAILY NEWS ON FACEBOOK OR ONLINE PORTALS THAN TV NEWS CHANNELS

### HOW OFTEN DO YOU GET YOUR NEWS ON THE FOLLOWING NEWS SOURCES?

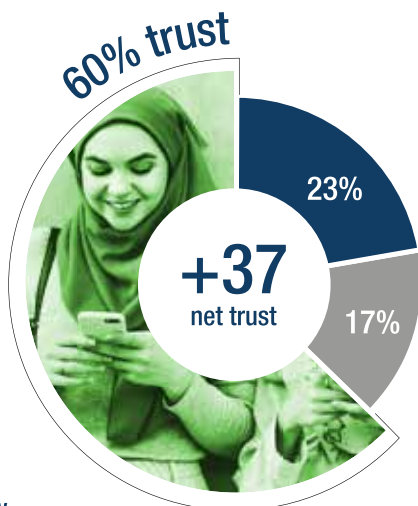
(Showing % 'daily')



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

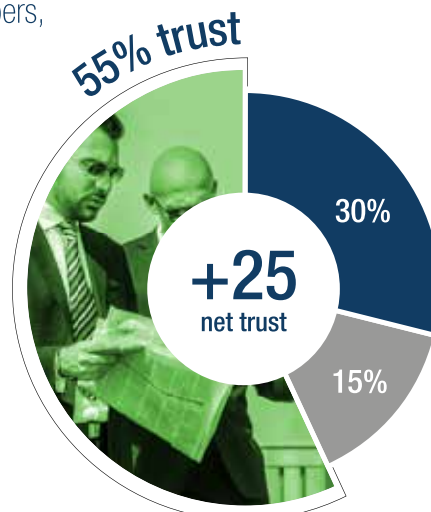
### HOW MUCH DO YOU TRUST THE FOLLOWING TO DO THE RIGHT THING?

#### Social media



#### Traditional media

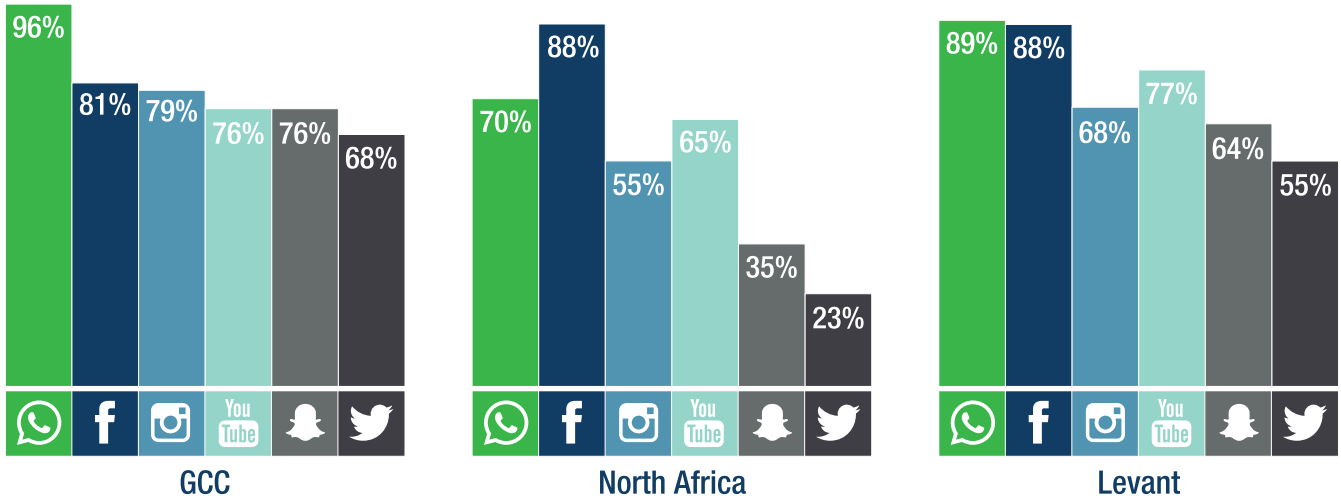
(TV, newspapers, radio)



- Trust
- Distrust
- Don't know

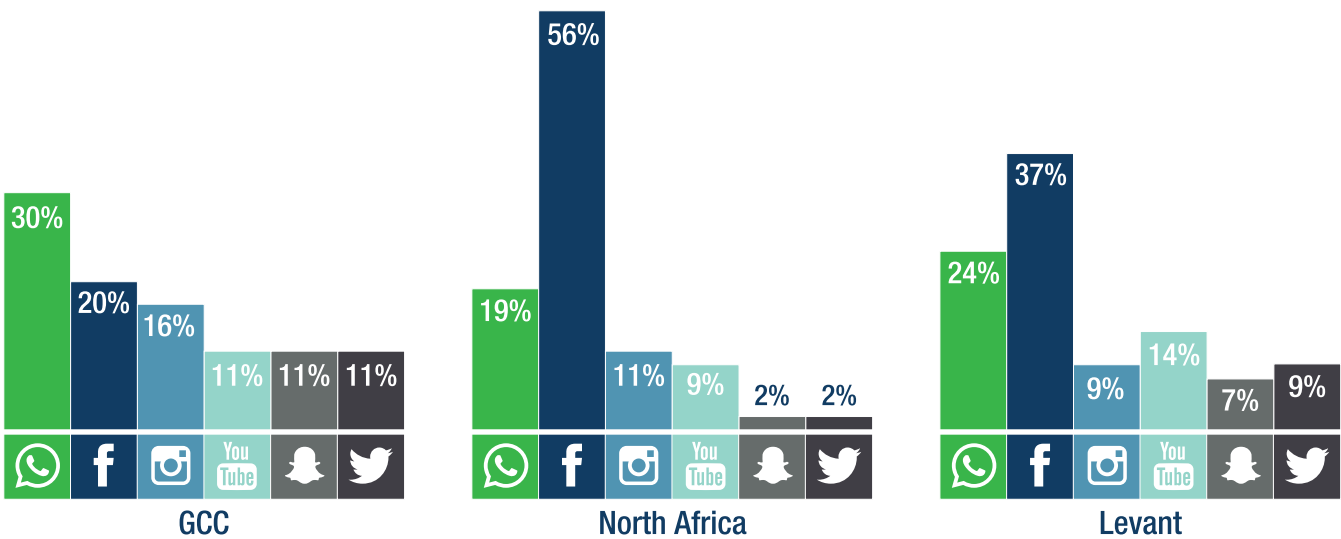
**NINE IN TEN YOUNG ARABS USE AT LEAST ONE OF THE MAJOR SOCIAL MEDIA CHANNELS DAILY**

**HOW OFTEN DO YOU VISIT EACH OF THE FOLLOWING?**



**FACEBOOK IS BY FAR THE MOST DOMINANT SOCIAL MEDIA CHANNEL IN NORTH AFRICA AND LEVANT, WHILE GCC YOUTH ARE MORE LIKELY TO SAY WHATSAPP IS THE MOST IMPORTANT SOCIAL MEDIA CHANNEL**

**WHICH OF THE FOLLOWING SOCIAL MEDIA CHANNELS IS THE MOST IMPORTANT TO YOU?**







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# ARAB YOUTH WANT INDEPENDENT SOURCES OF NEWS AND ALTERNATIVE NARRATIVES

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Iain Akerman is a writer, journalist and editor based between Dubai and Beirut. He writes for magazines across the Middle East and Europe and was editor of the Middle East edition of *Campaign* for six years prior to going freelance in 2014. He primarily reports on the region's creative industries, with a special focus on media and advertising.

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## Iain Akerman

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Social media is now more popular among Arab youth than traditional media. It is also viewed as more trustworthy; has become their dominant source of news; and has overtaken TV as the most important news medium among 18-to 24-year-olds in the Arab world. This is in stark contrast to just a few years ago, when the consumption of news was still dominated by television.

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**The next generation will be more connected than previously thought possible. That means the consumption of increased amounts of content across multiple platforms and devices.**

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There are two immediate – and conflicting – reactions to this. Firstly, that such trust in social media is surprising in a global context given the recent backlash against tech companies. And, secondly, that the findings are generally in line with global trends for this age bracket and are therefore only to be expected.

For the former, the view that tech giants have become too big and too powerful remains incredibly persuasive, and at the heart of that concern is the belief that they not only distort markets and political systems, but can't be trusted either. The results of the Arab Youth Survey 2019 fly in the face of this belief.

In a wider global context, however, the results of the survey match trends elsewhere in the world. A recent survey by the Pew Research Center in the US, for example, found that social media dominates as a news source for Americans aged 18 to 29, with 36 per cent obtaining their news via social media, compared with 27 per cent for news websites and 16 per cent for TV. Similarly, according to a Reuters Institute survey of 74,000 people in 37 markets last year, 53 per cent of 18-to 24-year-olds globally said they had used social media as a gateway to news in the past week – the highest percentage across all age groups and all gateways.

All of which plays into the narrative of a demographic shift towards mobile and


social platforms. After all, technology has eliminated traditional distribution barriers and transformed the way people consume content.

Nowhere more so, perhaps, than in the MENA region, where its youthfulness is only accentuating this trend.

None of which should come as a surprise. Twitter penetration in Saudi Arabia stands at more than 66 per cent and the GCC represents some of the MENA region's most active users. Since opening its MENA headquarters in Dubai in 2015, the Middle East has seen accelerated revenue growth for Twitter year-over-year, with MENA's revenue peak currently at an all-time high.

Snapchat, meanwhile, has more than 12 million daily active users in the GCC, with over nine million of those in Saudi Arabia alone (up from seven million in April 2017). There are also more than one million daily active users in the UAE, and when Snapchat's Shows was launched in the region last year it did so with 33 series produced by more than 20 media

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## Technology has eliminated traditional distribution barriers and transformed the way people consume content. Nowhere more so, perhaps, than in the MENA region, where its youthfulness is only accentuating this trend.

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partners, including MBC, Abu Dhabi Media and Dubai Media Inc.

Video plays a big part in all of this. Although reliable data is hard to come by in the Middle East, we do know that video formats account for the majority of Twitter's advertising revenue in the MENA region; that the Jeddah-based Arabic entertainment network UTurn has hired an all-Saudi team to create videos just for Snapchat; and that MBC is including vertical cameras on set in order to create Snapchat and Instagram-ready videos for its productions. There's also the much touted statistic that Saudi Arabia has the highest YouTube watch time per capita in the world. In short, millions of dollars are being ploughed into video in the region and that is benefitting social media companies more than traditional broadcasters or newspapers.

All of which goes some way to explaining Arab youth's preference for social media. Let us not forget, too, that traditional media is often tarnished by state control and publishers frequently shoot themselves in the foot.

Take Kuwait as an example. Last year five of the country's leading newspapers joined forces to deny editorial coverage to companies that do not advertise – a move that did nothing for their credibility or trustworthiness and made editorial subservient to both marketing and sales.

Then there are the perennial issues of political bias, censorship and the repression of journalists, all of which contribute to a general sentiment of distrust towards the region's traditional media, particularly among the youth.

All indicators, therefore, point towards a continuation of the shift towards social media, although the Reuters Institute noted a fall in the use of social media for news in several key markets last year, including the US, the UK and France, mainly due to a decline in the dissemination of news via Facebook. That doesn't necessarily mean good things for other media, with news sharing moving to messaging apps such as WhatsApp due to the desire for increased privacy and an aversion to online trolls.

What is clear, however, is that youth across the region are consuming more content than ever before and that the next generation will be more connected than previously thought possible. That means the consumption of increased amounts of content across multiple platforms and devices. It also means a youthful population that has little patience for mainstream regional media and a desire for both independent sources of news and alternative narratives.

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# ABOUT US



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

[www.asdaa-bcw.com](http://www.asdaa-bcw.com)



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

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

[www.bcw-global.com](http://www.bcw-global.com)



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

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# SOCIAL, ECONOMIC AND SOCIAL MEDIA INDICATORS 2019

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

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

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

#### Sources:

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