3rd Annual ASDA'A Burson-Marsteller Arab Youth Survey

BAHRAIN EGYPT IRAQ JORDAN KUWAIT LEBANON OMAN QATAR SAUDI ARABIA UAE

A White Paper on the findings of the
Third Annual ASDA'A Burson-Marsteller
Arab Youth Survey 2010
www.arabyouthsurvey.com
www.asdaa.com

Dubai, United Arab Emirates

March 15, 2011

Dear friends,

Three years ago, when we launched the First Annual ASDA'A Burson-Marsteller Arab Youth Survey, we did so knowing that to understand the future of the region, one had to understand the opinions, hopes and aspirations of young people in the Middle East.

Recent events in Tunisia, Egypt and Libya have shown just how important those hopes and aspirations are, and just how dangerous it is to ignore them. Nearly 60 per cent of the population of the Arab world is below the age of 25. That's more than 200 million people who are affected by key social problems such as unemployment, a rising cost of living and frustration at the lack of direct political participation in government.

Based on 2,000 interviews conducted before the protests swept the region, the findings of the 2010 ASDA'A Burson-Marsteller Arab Youth Survey, analysed here, reveal the moods and feelings of a generation on the cusp of change. We wanted to see how recent events had altered the attitudes of young people, so, during February 26-March 5, 2011, we went back into the field and interviewed 500 more young people in Egypt, Iraq, Bahrain, Lebanon and Jordan for a Survey Update. Their responses, which are in the last section of this White Paper, make for fascinating reading.

The challenges facing this generation are huge - an acute absence of opportunities combined with rising costs of living, a lack of representation and, in some countries, a feeling that any economic recovery is failing to trickle-down - are equally important in feeding the frustrations that have brought such rapid and surprising developments across the region.

The youth revolution in the Middle East is a game changer. In the short term there will be difficulty in building democratically run institutions, which will take over from autocratic regimes that were really not accountable to their people. In the long term freedom and democracy can transform the region slowly but surely into an emerging market of significance in the global economy.

Information technology played a critical role in providing a voice to Arab youth. TV networks such as Al Jazeera and Al Arabiya provided the minute-by-minute information and reports, largely unencumbered by government interference, but it was the new social networks such as Facebook and Twitter that were brilliantly harnessed by Arab youth as tools to organise the protests on the ground.

The youth of the Arab world have been ignored for too long. For too many years, governments and international agencies have spoken of the problems youth face as either something abstract or something for the future. The past few months have demonstrated in the clearest possible terms that those problems are real, and that the future is here.

But amid the obstacles lie opportunities. A youthful population, with a global outlook, can be a driver of growth. Technologically savvy, politically aware and increasingly entrepreneurial, this generation, given the opportunity, can rise to the considerable challenges they face. After years of relative silence, a generation has now spoken. It is high time we listened.

Sincerely,

Sunil John
Chief Executive Officer
ASDA'A Burson-Marsteller

About the ASDA'A Burson-Marsteller Arab Youth Survey Methodology

"Associate company Penn Schoen Berland (PSB) conducted 2,000 face-to-face interviews among respondents between December 27, 2010 and January 20, 2011."

The study was commissioned by ASDA'A Burson-Marsteller to focus on attitudes among Arab national and expatriate youth aged 18 to 24 in 10 Middle East countries: the six countries of the Gulf Cooperation Council (Saudi Arabia, UAE, Qatar, Kuwait, Bahrain and Oman), Jordan, Lebanon, Egypt and, for the first time, Iraq.

The research was designed to uncover country differences and common trends, looking at issues including: attitudes to democracy, access to technology, media consumption trends, social media networking, use of leisure time, spending habits and attitudes towards education and employment.

Associate company Penn Schoen Berland (PSB) conducted 2,000 face-to-face interviews among respondents between December 27, 2010 and January 20, 2011.

The respondents were selected to provide an accurate reflection of each country's demographic, geographic, and socio-economic mix. The 2,000 respondents included 250 young people from the UAE, 200 each from Saudi Arabia, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Oman and Qatar; and 150 from Iraq. The entire sample was weighted to include 20 per cent of respondents from the AB socio-economic group; 35 per cent from C1 and 45 per cent from C2. The gender split of the survey was 60:40 male to female.

All those taking part were young Arabs, and were either citizens of each country, or a mix of nationals and expatriates according to the demographic mix in each market surveyed. This meant that respondents in Bahrain, Egypt, Iraq, Jordan, Lebanon and Oman were all nationals; in Kuwait and Saudi Arabia, respondents were 75 per cent nationals and 25 per cent expatriates; and in Qatar and the UAE, there was a 50:50 split between both groups.

> Following unrest in the Middle East in January 2011, PSB conducted an additional 500 face-to-face interviews in Egypt, Jordan, Lebanon, Bahrain and Iraq. These interviews were conducted- among Arab nationals aged 18 to 24. This fieldwork was conducted between February 26 and March 5, 2011, in capital cities.

The geographic location of respondents was also taken into account by PSB when developing the fieldwork methodology – with 40 per cent of Saudi Arabian respondents living in Jeddah, another 40 per cent in Riyadh, and 20 per cent based in Dammam, for example.

In the same way, UAE respondents were drawn from three of the country's emirates: Abu Dhabi, Dubai and Sharjah; Kuwait's youth from four distinct regions: Kuwait City, Al Hawalli, Al Ahmadi, and Al Farwaniya; Lebanese youth from East and West Beirut, and from Tripoli; and so on across each country. When analysed, this geographic spread provides a more accurate national picture than findings based solely on the responses of those living in capital cities.

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All comparative data related to the Survey Update compares only the findings from the five relevant countries during the December, 2010 to January, 2011 and February-March, 2011 periods.

Introduction

> “In looking at the Middle East, it must be acknowledged that the geographic designation is far from being a single political or even cultural entity. The Levant, the Maghreb and the Gulf countries differ markedly from each other, and even within these blocs, differences can outweigh similarities.”

To understand the Middle East, and its future direction, one must understand the needs, desires and fears of its youth. The nations that comprise the Middle East boast a population of 360 million – more than the US and Canada, and almost three-quarters of the EU. What is more, that population is young, and getting younger – two-thirds are under the age of 24, compared with two-thirds over the age of 24 in the US, Japan and Western Europe.

As a result, according to the Arab League and UNDP, the region's economies need to create 51 million jobs by 2020 to meet the demand of current unemployment and those entering the workplace. The Gulf Cooperation Council alone need to create 4 million jobs in the next 20 years .

Unemployment cannot be over-emphasised: according to the Arab Labour Organisation, an estimated 20 - 25 per cent of people aged between 15 - 29 in the Middle East are currently without jobs – female unemployment is even higher at 32 per cent. In Egypt and Morocco, it can take, on average, three years for a school-leaver to find a job.

In looking at the Middle East, it must be acknowledged that the geographic designation is far from being a single political or even cultural entity. The Levant, the Maghreb and the Gulf countries differ markedly from each other, and even within these blocs, differences can outweigh similarities.

The countries of the Gulf Cooperation Council, for example, are frequently treated as a politically and culturally homogenous group. Traditionally, through not exclusively, oil rich, it has become easy to look at these states as more privileged, and more stable, than the rest of the Arab world. As such we end up with “us and them” analogies that, at face value, show a wide divide between the economic successes of the Gulf states and the problems faced by other nations.

"So, young nations present challenges, but also opportunities. The skills, talent and ability to work of a young population need not be hindrances, but drivers of growth. What has become apparent, through the protests in early 2011, is that the region's youth expect to have a greater say in their own destinies."

The unrest in Bahrain and Oman has proven that the GCC isn't as homogenous or as stable as once thought. In fact, only four of the six states are oil (or, in Qatar's case, gas) rich. Bahrain and Oman have largely exhausted their oil wealth; while culturally, Bahrain, with its Shia majority, stands apart from the overwhelmingly Sunni states that make up the rest of the bloc.

Even politically there are huge differences: Kuwait, for example, has a democratic system defined by infighting, corruption and periods of inertia that, while far from the envy of its neighbours, is recognisibly closer to political systems in the West than the regimes in most Arab states.

Still, the problems faced by all Arab states are remarkably similar. Youth unemployment is ranked as much of an issue in Dubai as it is in Beirut – but the consequences of that unemployment are, for the time being very different. The wealthier Gulf states have in place extensive social safety nets that mitigate the impact of chronic unemployment; in countries where no such safety net exists, unemployment moves from being a mere concern to, perhaps, being the driving factor of mass unrest.

The successes, too, are similar: today's young Arabs are increasingly connected and technologically savvy, as well as well-informed about current affairs, no matter where they are from.

So, young nations present challenges, but also opportunities. The skills, talent and ability to work of a young population need not be hindrances, but drivers of growth. What has become apparent, through the protests in early 2011, is that the region's youth expect to have a greater say in their own destinies.

GCC, Levant and North Africa: Economic & IT Indicators

GCC

Country	Population (million)	GDP -PPP (US billion)	Contribution of oil to GDP (per cent)	Unemployment (per cent)	Internet Penetration (million)	Penetration Rate (per cent)	Facebook penetration (million)	Penetration Rate (per cent)
Saudi Arabia	26.1	622.5	45	10.8	9.8	38.1	3.45	13.43
UAE	5.1	199.8	25	4.2*	3.78	75.9	2.05	41
Kuwait	2.8	144.3	50	2.2	1.1	40	0.55	20
Qatar	0.85	122.2	50	0.5	0.44	51.8	0.412	49
Oman	3.1	76.5	9	15	1.24	42	0.23	7.7
Bahrain	1.2	29.8	11	15	0.65	88	0.24	32

**A recent FNC statement said unemployment in UAE is 13 per cent - the measure was based on anyone above 15 years of age not employed or looking for a job*

Levant Region

Country	Population (million)	GDP -PPP (US billion)	Contribution of oil to GDP (per cent)	Unemployment (per cent)	Internet Penetration (million)	Penetration Rate (per cent)	Facebook penetration (million)	Penetration Rate (per cent)
Syria	22.5	106.4	NA	8.3	3.9	17.7	0.03	0.1
Lebanon	4.1	58.7	NA	9.2	1	25	1.23	29.75
Jordan	6.5	33.8	NA	13.4	1.75	27	1.3	20.3
Palestine Authority	4.2	11.95	NA	25	0.48*	9.6	0.35	8*

**Source: Economic and Social Commission for Western Asia*

North Africa

Country	Population (million)	GDP -PPP (US billion)	Contribution of oil to GDP (per cent)	Unemployment (per cent)	Internet Penetration (million)	Penetration Rate (per cent)	Facebook penetration (million)	Penetration Rate (per cent)
Egypt	82	500	NA	9.7	13.7	16	5.65*	7
Morocco	31.9	153.8	NA	9.8	10.4	33.4	3.03**	9.53
Tunisia	10.6	100.3	NA	14	3.6	34	1.67	15.8
Algeria	34.9	254.7	30	9.9	4.7	13.6	1.08	3.1
Libya	6.6	89	25	30	0.35	5.5	0.18	2.8

** Growth in Facebook users from 4.3 million on Nov 15, 2010 to 5.65 million as of March 1, 2011*
*** Growth from 2.2 million on November 13, 2010 to 3.03 million as of March 1, 2011*

Source for Internet and Facebook: Internet World Stats and Social Baker
Source for GDP and other figures: CIA Fact File, Wikipedia, UAEinteract.com, Global Finance

Top 10 Findings of the 2010 ASDA'A Burson-Marsteller Arab Youth Survey

1. An enduring desire for democracy
2. Anxiety grows about rising cost of living
3. Gap between rich & poor of increasing concern
4. Less optimism about economic recovery and future outlook
5. Education gap widens betweens Gulf states and other Arab countries
6. Increasing preference to work in private sector, eagerness to start own business
7. Internet makes more inroads, with social media growing in importance
8. Television the most popular and trusted source of news
9. Traditional values are paramount, while parents grow in influence
10. Increase in positive perception of global powers, growing sense of global citizenship

Top 5 Additional Findings of the Survey Update, March 2011

1. Importance of democracy is greater than ever – but so is desire for stability
2. Concern about the cost of living, and corruption, continues to escalate
3. Increased frustration with domestic status quo
4. Support of the protests is high, and so is belief in their positive impact
5. Political views are increasingly liberal and forward-looking

Executive Summary

The Annual ASDA'A Burson-Marsteller Arab Youth Survey, now in its third edition, has never been more relevant. It's findings reveal that the highest priority for young Arabs is **living in a democratic country**, reflecting similar priorities in previous Arab Youth Surveys. This was particularly important in non-Gulf countries, where 80 per cent of respondents cited "living in a democratic country" as their greatest priority, compared with 60 per cent of GCC respondents. Iraqi youth placed the greatest emphasis on living in a democracy, with 91 per cent saying this is "very important," while Qatari youth place by far the least importance on democracy (33 per cent).

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The greatest current perceived challenge and concern among young Arabs is the **rising cost of living.** In total, 48 per cent of respondents ranked the rising cost of living as one of the greatest challenges, followed by unemployment (36 per cent) When asked about their greatest concerns – as opposed to the greatest challenges – Arab youth similarly prioritised the rising cost of living: 58 per cent said they were very concerned about this, down from 67 per cent in 2009. Concerns about the high cost of living are especially acute in Egypt (77 per cent), Lebanon (71 per cent) and Bahrain (68 per cent).

This year, **the gap between the rich and the poor** registered the most significant increase in perceived concerns among young Arabs, from 33 per cent in 2009 to 43 per cent in 2010. This issue is of much greater concern to non-GCC youth (53 per cent) than to their peers in the Gulf (39 per cent).

Overall, the majority of Arab youth continue to believe that their country of residence is **heading in the right direction**, though the split between Gulf and non-Gulf countries is noticeable. Qatari youth are the most optimistic, at 88 per cent, while Lebanese (35 per cent) and Egyptian youth (38 per cent) are the least optimistic. Saudi youth have experienced the greatest negative shift in outlook (down from 98 per cent in 2009 to 62 per cent in 2010).

Perceptions of **domestic economic recovery** from the impact of the financial crisis also vary widely, with more positive sentiment in the Gulf. In Qatar, 75 per cent of young people believe their country has completely recovered from the crisis, while in Lebanon, 56 per cent believe their country has yet to recover at all.

The **educational expectation gap** between GCC and non-GCC Arab youth is extremely wide, and appears likely to widen further**:** 63 per cent of GCC youth currently in school say they expect to pursue further education, compared to just 14 per cent of non-GCC youth.

Employment expectations also vary between Gulf and non-Gulf countries.

> The findings from the Survey Update reveal that, while the importance of democracy is even more pronounced, it is balanced by a desire for stability. Young people in these countries are markedly less confident that their countries are moving in the right direction than they were just a few months ago.

Most Gulf Arab youth would prefer to work for the government, while most of their non-GCC peers aspire to a private-sector career. However, when it comes to **entrepreneurial aspirations**, Gulf youth are the clear leaders, with 62 per cent saying they intend to start their own business in the next five years, compared to 32 per cent of non-Gulf youth.

The playing field is far more level when it comes to communications. **Internet usage** among regional youth continues to increase significantly, and is nearly equal among Gulf and non-Gulf youth.

Social networking is growing in popularity throughout the region, with 60 per cent of Arab youth saying they engage in online social networking, an increase of 28 per cent from 2009.

Despite the rise in Internet use, **television** remains the most popular and trusted source of news, followed by newspapers and online news sources.

Traditional values, and their preservation for future generations is important to youth across the region, especially in Iraq and Bahrain: 82 per cent of all youth say that "traditional values means a lot to me, and ought to be preserved for generations to come."

Young Arabs have increasingly **favourable views of the major global powers** – although the views of specific nations sometimes diverge significantly.

The concept of **global citizenship** is increasingly important for many young people, particularly in Lebanon, Qatar and Oman and especially Iraq, where nine in ten respondents considered it very important. Global citizenship is less important in Bahrain and Saudi Arabia, with less than half of young people in Bahrain considering the idea to be important.

The findings from the **Survey Update** reveal that, while the **importance of democracy** is even more pronounced, it is balanced by a **desire for stability.** Young people in these countries are markedly less confident that their countries are moving in the right direction than they were just a few months ago.

An enduring desire for democracy

> **"Two-thirds of those surveyed said that living in a democratic country was the most important issue for them as they looked to the future. Remarkably, this has taken over from finding a job as the most important priority, given that the region needs to create about 50 million jobs by 2020 to employ its predominantly young population."**

The Third Annual ASDA'A Burson-Marsteller Arab Youth Survey asked respondents to rate different issues as 'very important' or 'somewhat important'. These issues varied from access to employment to the fear of terrorism, from living in a safe neighbourhood to the value of living in a democracy.

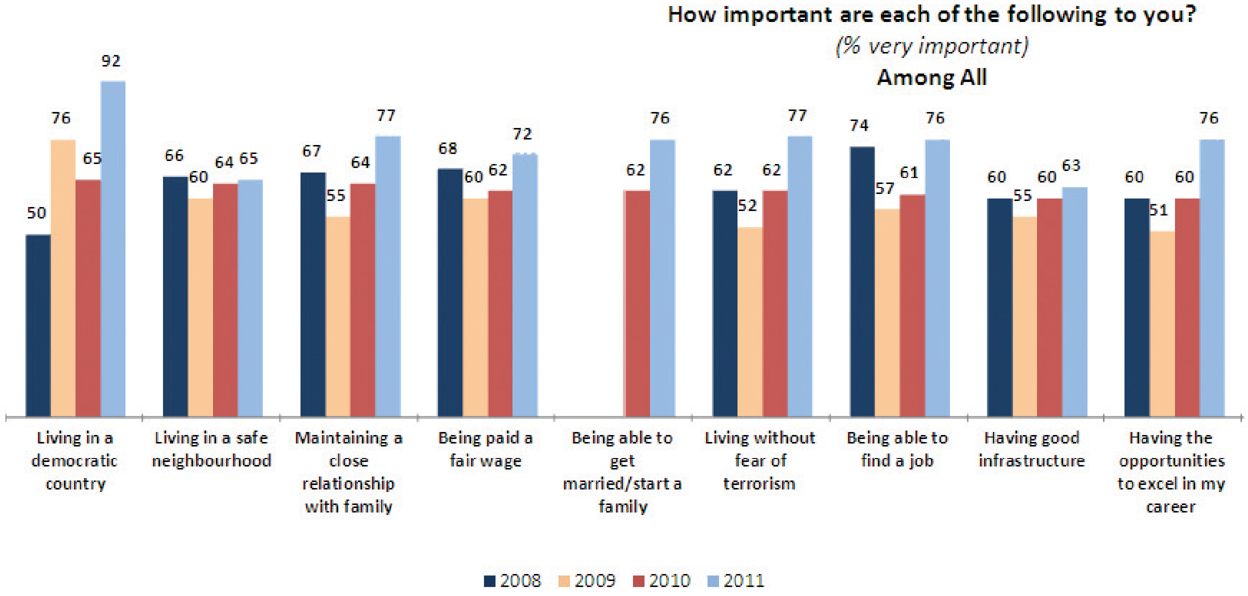
Two-thirds of those surveyed said that living in a democratic country was the most important issue for them as they looked to the future. Remarkably, this has taken over from finding a job as the most important priority, given that the region needs to create about 50 million jobs by 2020 to employ its predominantly young population.

Nine in ten young Iraqis believe that living in a democracy is very important, while there is also a strong call for representation in Jordan, Egypt, Lebanon and Bahrain. In the other Gulf states, only a third of respondents in Qatar ranked democracy as important, with two-thirds stating that living in a safe neighbourhood is a more pressing priority. Perhaps surprisingly, fully three-quarters of those surveyed in the UAE said democracy was important, the same figure as in Kuwait and just three points less than Egypt.

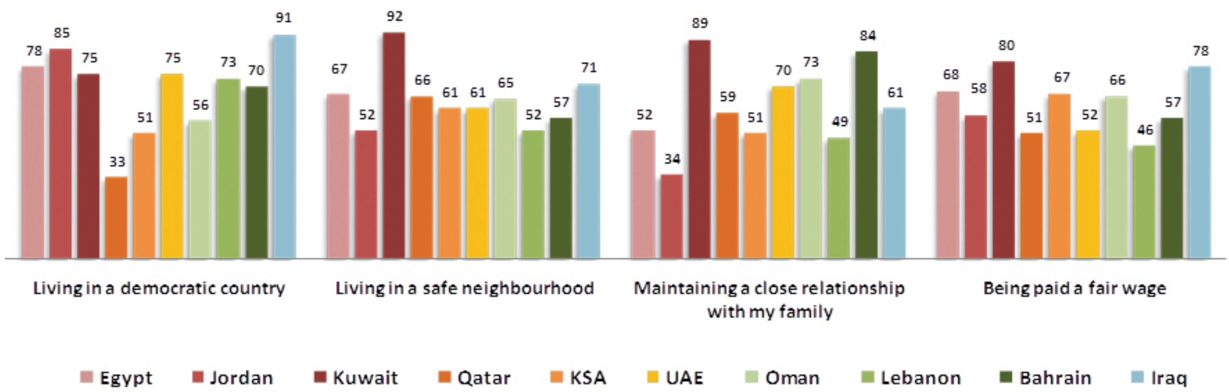
This represents a significant change from our first survey, in 2008, when only 58 per cent of respondents in the UAE saw democracy as very important. In Qatar, the change is more dramatic, albeit going against the grain: in 2008, 68 per cent of Qataris saw democracy as important, against just 33 per cent today. An exceptionally strong economy and pride in winning the 2022 World Cup could well have altered the priorities for young Qataris. Across all the GCC states, access to healthcare and maintaining a close relationship with family were also priorities for young people.

Hand in hand with a desire for democracy, however, is increased concern at the role Islamic parties play in politics. In total, 38 per cent of those surveyed raised this as an issue – a jump of 9 percentage points from last year. The concern is particularly marked in non-Gulf countries, with 46 per cent expressing concern, against 35 per cent of those in the Gulf states. Given that the vast majority of the predominately Muslim respondents cite religion as an important influence in their life, the figures suggest that young Arabs are keen to preserve a separation between religion and state.

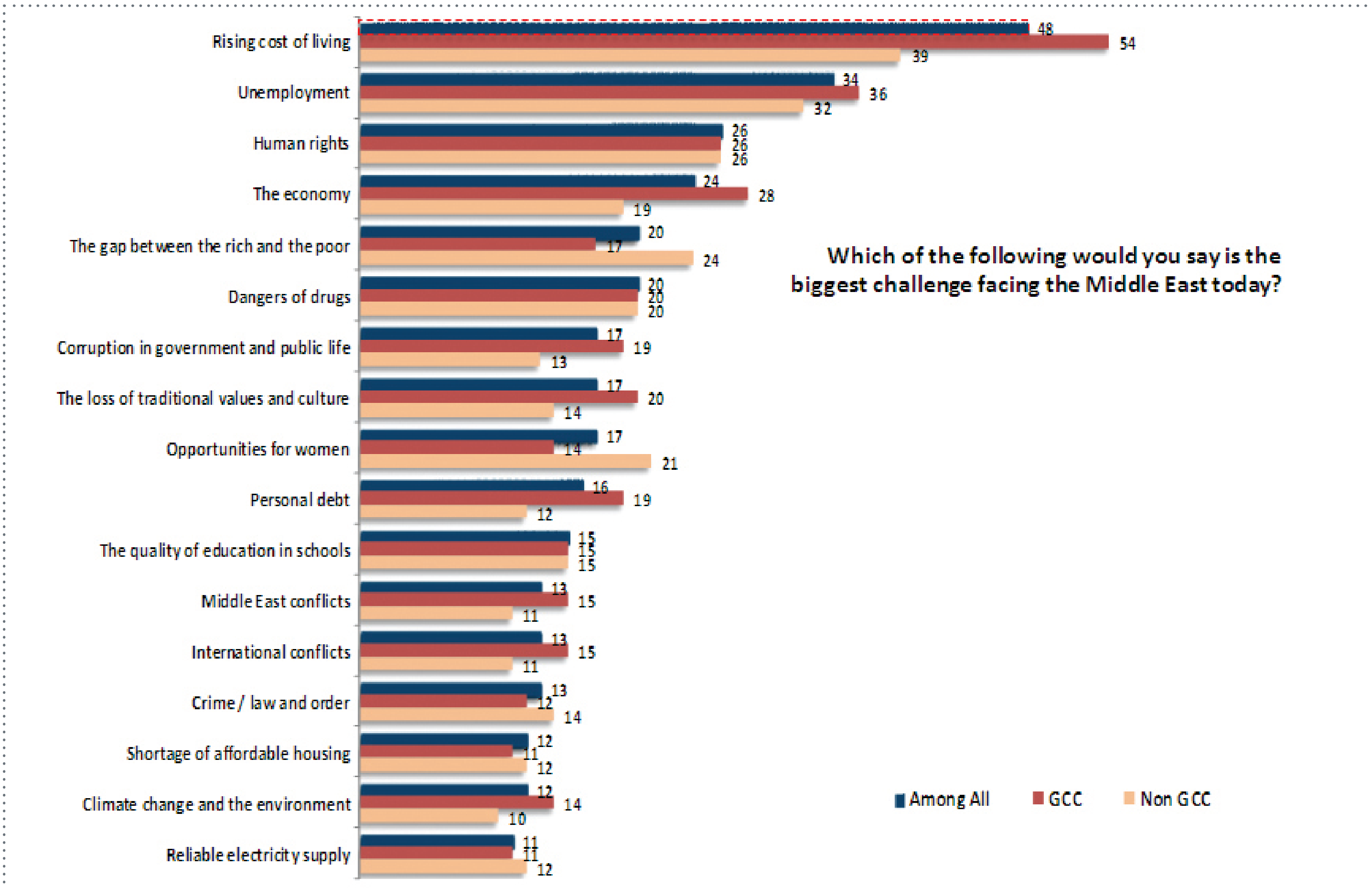
MOST IMPORTANT



MOST IMPORTANT



BIGGEST CHALLENGE



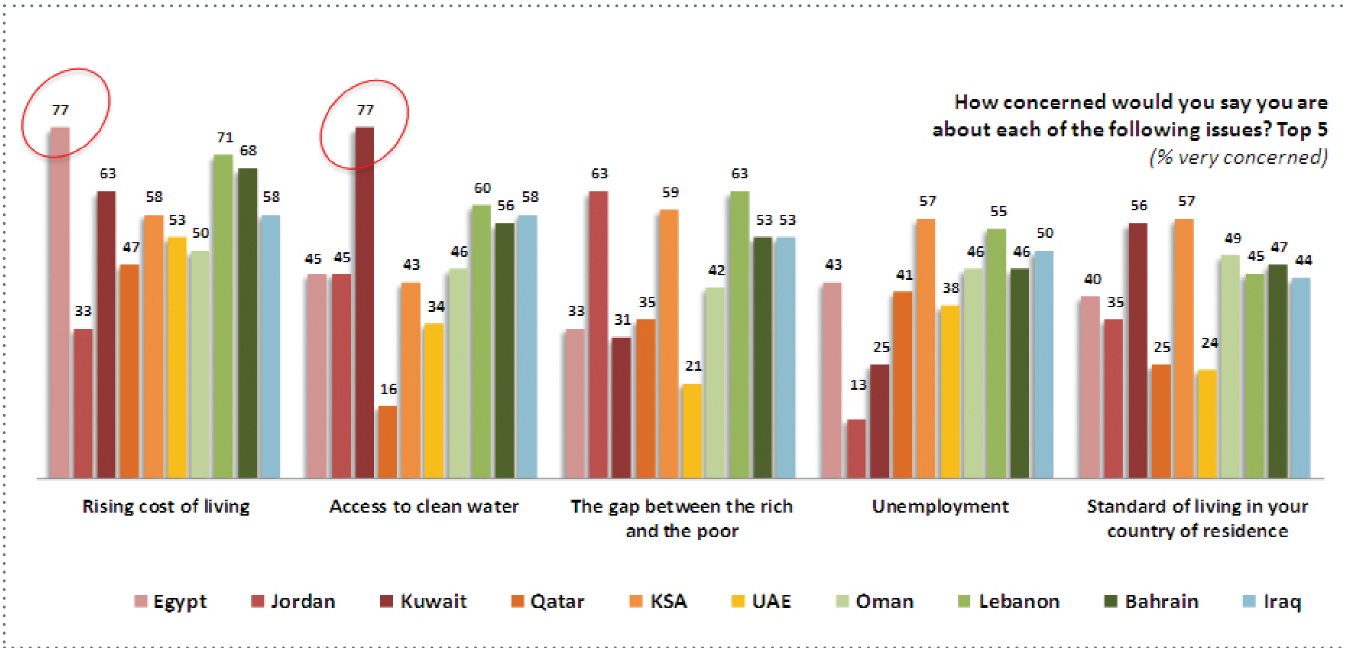
The single biggest challenge identified by all young Arabs is the rising cost of living. While unemployment, human rights and fears over the economy are regarded as pressing, the concrete reality of struggling to pay for goods and seeing prices for basics trumped other more abstract concerns.

The rising cost of living was also cited as the biggest concern in the 2008 and 2009 Arab Youth Surveys, and this very material fear – that young people won't necessarily enjoy the benefits enjoyed by the previous generation – isn't restricted to the Middle East.

For young Arabs, however, the rising cost of living is strongly associated with other concerns, particularly about employment. Egypt, where protests toppled Hosni Mubarak as president, and Lebanon, which is once again gripped by political turmoil, were the most concerned when it came to the rising cost of living, with 77 per cent of Egyptians and 71 per cent of Lebanese citing the issue as the biggest challenge they face. In the wealthier Gulf countries, more than two-thirds of young people in Bahrain, which has seen its own political turmoil and protests, saw the rising cost of living as a major issue; in Qatar, however, this falls to less than half.

Those in Egypt, Lebanon and Bahrain are the most concerned about the rise in cost of living. In Egypt, standard of living and unemployment are also of concern, providing the backdrop on which to view January and February's protests.

CONCERNS FOR 2011



Gap between rich and poor of increasing concern

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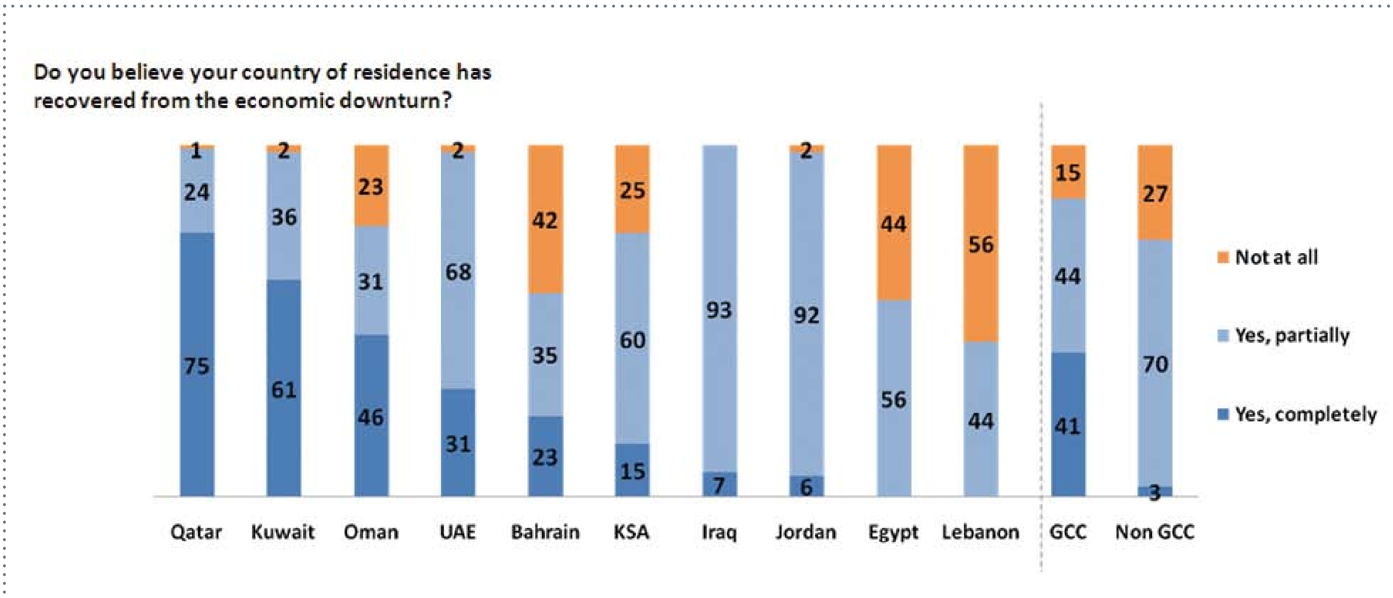
While the rising cost of living is still viewed as the biggest challenge, young people were actually slightly less concerned about the issue than they were a year ago, perhaps reflecting a positive sentiment towards economic recovery in some countries. Concern over the rising gap between rich and poor, however, has registered a strong jump: almost half of those surveyed see this as a major problem, against just a third in the 2009 survey.

The wealth divide is of less concern to those in the richer Gulf states, where the majority of national populations enjoy extensive, generous state benefits: 53 per cent of young Arabs in non-Gulf countries cited the wealth gap as a pressing issue, against 39 per cent in Gulf countries. Interestingly, this is despite Gulf respondents being slightly more concerned about unemployment, which, again, can be attributed to the generous social services in place in most GCC states, which soften the impact of joblessness on individuals and families.

The crucial point in the wealth divide appears to be where the "have-nots" sit. In the UAE and Qatar, for example, even the poorest members of the community are in a better financial position than the majority of their Arab compatriots outside of the Gulf. Half of Egyptians, for example, live under or near the poverty line. As a contributing factor in the recent protests, the wealth divide must be seen as significant; combined with a rising cost of living and a perceived decline or stagnation in general living standards, a perception that the gap is growing, even amid economic recovery, will serve as potent fuel for resentment and anger.

ECONOMIC RECOVERY



Less optimism about economic recovery and future outlook

From the evidence presented in the survey, it can be argued that *the* decisive factor – the tipping point – that triggered regional unrest stems from the continuing fallout of the global financial crisis. While the Middle East escaped the full brunt of the economic slowdown, the effects on economies that were growing slowly, or had implemented economic reforms that negatively impacted the day-to-day living of some citizens, was disproportionate. Rising food prices and increasing unemployment are factors that have driven the desire for better representation, in being able to take decisions about how they are governed.

Yet the most marked difference in the two countries surveyed that have faced the biggest unrest – Egypt and Bahrain – does not necessarily stem from direct fears over jobs, or the rising cost of living – and it's a difference that has not only local but global implications.

When asked about the economic recovery, in Bahrain, Egypt and Lebanon a significant number of respondents (42, 44 and 56 per cent respectively) stated that their countries had "not at all" recovered from the economic crisis. In Iraq, admittedly starting from an extremely low base, 100 per cent thought the recovery was under way in one form or another; in the UAE, one year on from the Dubai World debt default, only 2 per cent saw no evidence of recovery.

The significance of this is telling: while Lebanon hasn't seen the same sort of protests as Bahrain or Egypt, that may have more to do with the country's unique politics and circumstances. After all, the country went through its own "Cedar revolution" two years ago, which did not significantly change the sectarian political system.

> "This survey is a measurement of perception of economic recovery. Facts and figures from governments, the IMF and analysts may suggest recovery is well underway (as was the case with 2010 indicators regarding Egypt) but these statistics are meaningless if the people on the ground see no improvement."

The figures for Oman and Saudi Arabia may be a cause for concern: 23 per cent of young Omanis, and a quarter of young Saudis, see no evidence of recovery – a crucial fact that is missed when comparing "GCC with non-GCC." Looked at from a straight geographic divide – Gulf vs. non-Gulf, the figures point to a growing divide between GCC and non-GCC countries, with 41 per cent of GCC respondents agreeing that their countries had completely recovered from the crisis, against just 3 per cent of those outside the Gulf. In reality, fully half of the GCC states, including the most populous one, are far less sanguine about their economies than the "GCC" grouping would suggest.

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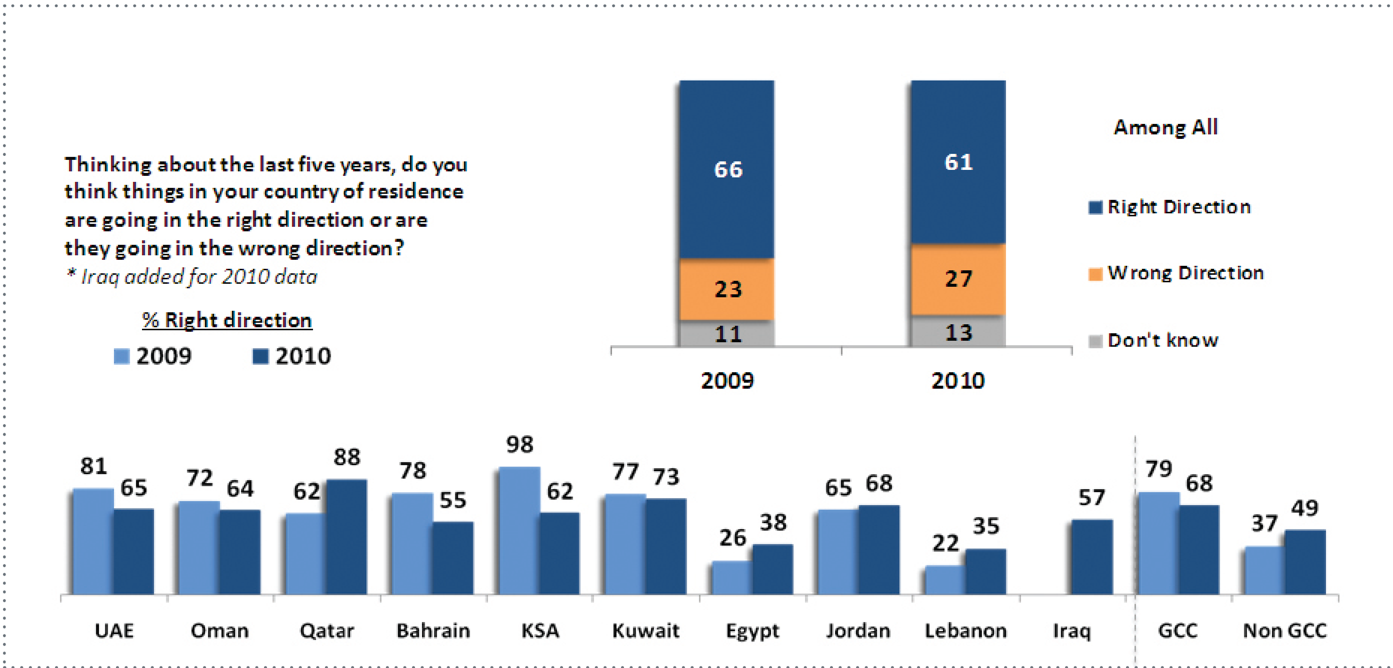
This has global implications: austerity measures being enforced everywhere from Europe to Latin America may be viewed as necessary to economic recovery, but the perception of those on the ground – especially youth who face the same issues with jobs and rising living costs as their compatriots in the Middle East – suggests an unpredictable and unstable period ahead.

Overall, according to the survey results, the majority of Arab youth feel that their country is going in the right direction, with 61 per cent believing their country is on the right track, against 27 per cent who think it's heading in the wrong direction, and 13 per cent who are unsure. It should be noted that this is an overall drop of 5 per centage points from last year, and breaking the figures down regionally and by country reveals far more disparate, and pessimistic, views.

GENERAL OUTLOOK



> "In the GCC, 68 per cent of young people feel their country is going the right direction – a significant drop of 11 percentage points from last year. Outside the GCC, the figure is 49 per cent – representing a surprising increase of 12 points from last year."

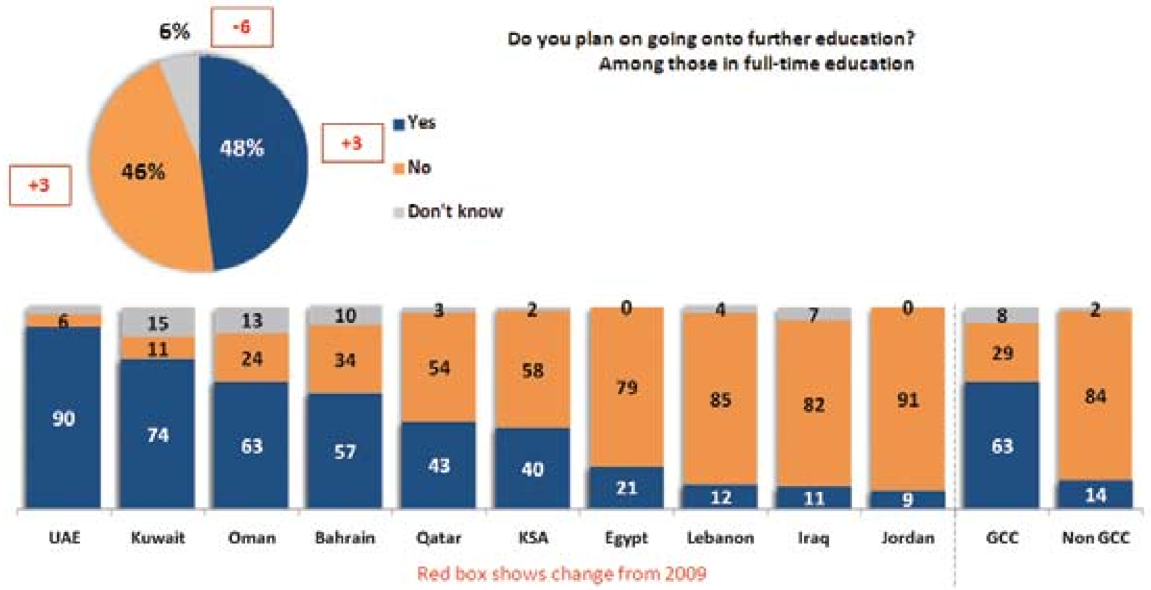
In the GCC, 68 per cent of young people feel their country is going the right direction – a significant drop of 11 percentage points from last year. Outside the GCC, the figure is 49 per cent – representing a surprising increase of 12 points from last year.

Drilling down further into the countries themselves brings more surprises: Saudi Arabia and Bahrain saw the most precipitous drops; with Bahrain falling from 78 per cent to 55 per cent, and Saudi Arabia plunging from near universal approval at 98 per cent to 62 per cent. Qatar registered the only jump in approval in the GCC, from 62 per cent to 88 per cent, reflecting the country's economic success and winning the right to host the 2022 World Cup.

Outside the GCC, at first glance it seems surprising that most countries – Egypt included – recorded a rise in the number of people thinking that their nation is on the right track. However, the approval ratings are still low – in Egypt, even a jump to 38 per cent puts the level of those who view the country's direction favourably at about half that of any other country, and likely reflects that some improvement in economic conditions and sentiment has started to trickle down.

All in all, the outlook figures are somewhat unclear, and offer few clear-cut indications, aside from the fact that Qataris seem particularly happy with their lot. However, the figures do seem to suggest an eventual meeting between sentiment in GCC and non-GCC states when it comes to positive outlooks, with the former in decline and the latter on the rise.

EDUCATION



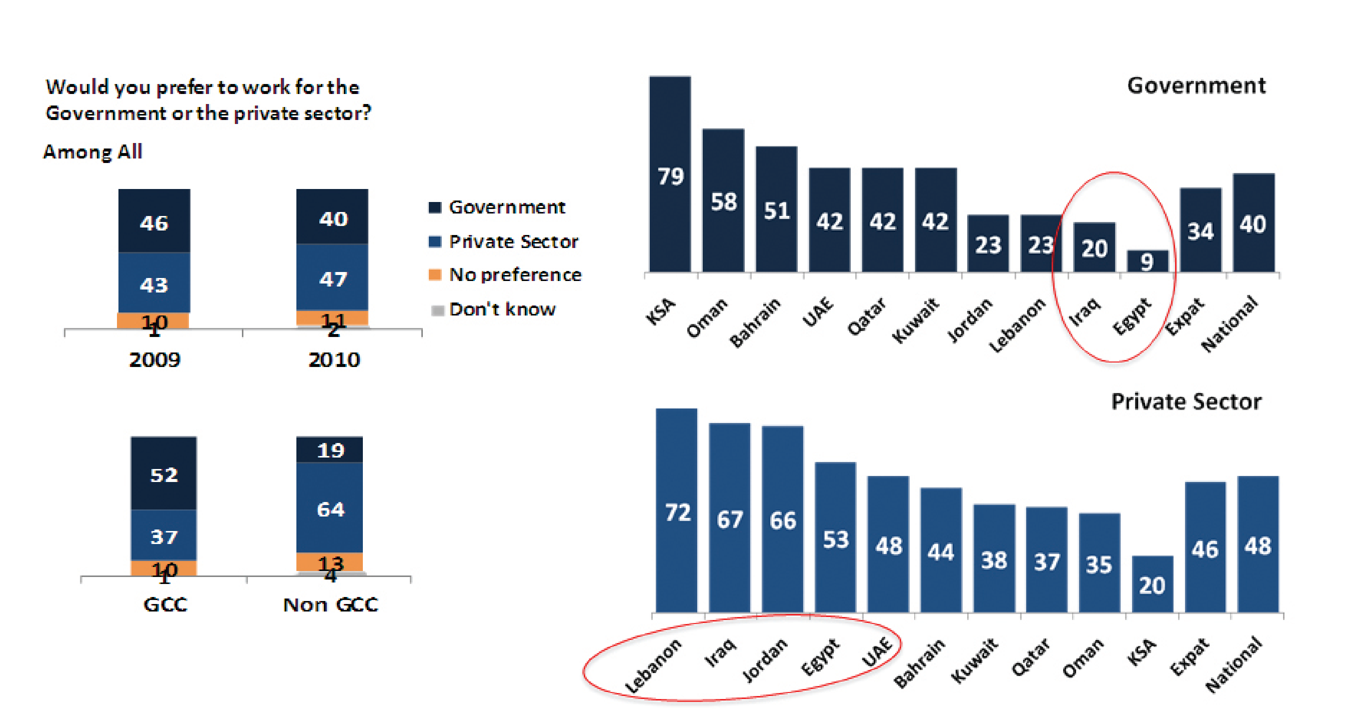
Education gap widens betweens Gulf states and other Arab countries

The area where the Gulf-non-Gulf divide is most marked is in attitudes to education. In the wealthy UAE, nine out of ten respondents plan on continuing education – a figure that is completely reversed in Jordan, where just one in ten has the same plans. In the blocs as a whole, 63 per cent of young Gulf Arabs plan on attending university, with just 14 per cent of their non-Gulf compatriots planning on doing the same.

At the upper end, 90 per cent of UAE youth expect to pursue further education, followed by Kuwait (74 per cent), Oman (63 per cent) and Bahrain (57 per cent). At the opposite end of the spectrum, just 9 per cent of Jordanian youth say they expect to pursue further education; low expectation levels also exist in Iraq, at 11 per cent, Lebanon (12 per cent) and Egypt (21 per cent).

In terms of having a significant influence on the unrest, these figures offer few clues. However, it does suggest that, based on the employment and earning potential of graduates versus non-graduates, the existing economic gap between Gulf and non-Gulf countries, which is currently largely based on access to mineral resources, could continue, and even widen, as the nations move to transition themselves into viable, diversified economies.

FUTURE CAREERS



Growing preference to work in private sector, eagerness to start own business

There has been a slight decline in the desire to work for the government, even in those Gulf states where a job in the public sector has long been considered a given for national citizens.

Still, 52 per cent of GCC citizens favour a job with the government (a figure that ranges from 42 per cent in Kuwait to 79 per cent in Saudi Arabia) against just 19 per cent in the non-Gulf countries. In Egypt, just 9 per cent of respondents wants a job in the public sector, a remarkably low figure by all regional standards, and perhaps an indication of the disdain with which the public sector is held – as well as low salary levels in government.

While unemployment remains one of the biggest concerns, young people maintain strong opinions about what they want to do in their working lives. In addition to constant themes, such as work-life balance, working with talented people is of increasing importance, as is working with a company that demonstrably gives back to the community.

Just over half of all regional youth say they intend to start their own business in the next five years. Gulf Arab youth have much greater entrepreneurial aspirations, with 62 per cent saying they intend to start their own business in the next five years (including a remarkable 90 per cent of Saudi youth)

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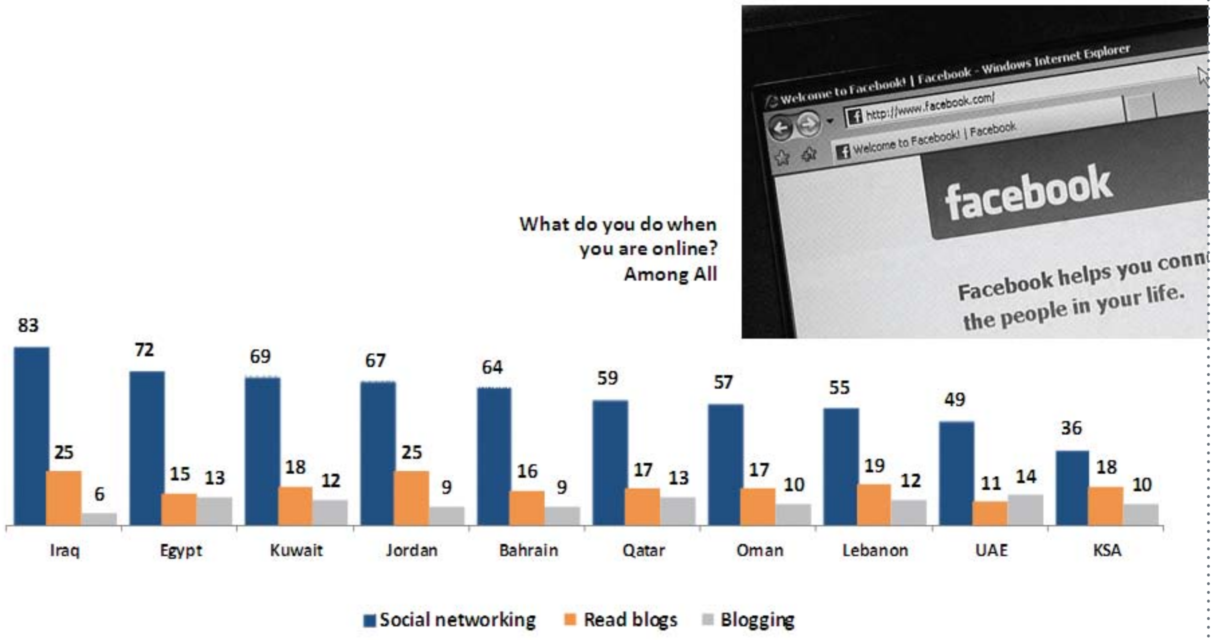
compared to 32 per cent of non-GCC youth. Conversely, 61 per cent of Egyptian youth say they do not intend to start their own business in the next five years. This may be more of a perception of the relative ease of starting a business in the Gulf, in terms of access to capital and overcoming red tape, compared to bureaucratic regimes outside of the Gulf.

INTERNET USAGE



Internet makes more inroads, with social media increasing in influence

A large amount of media attention has been focused on the role of communications and technology in recent unrest. How much these events can be defined as a "Facebook revolution" is open to dispute. Certainly, social media provides an effective way to communicate, but it must be remembered that in Egypt, Internet penetration is at 16 per cent lower than other countries, and that the Internet service in the country was severely disrupted for the duration of the protests, rendering the effectiveness of Facebook or Twitter in sustaining the protests after they had begun, a moot point at best.

Another interesting development to note is the dramatic growth of nearly 1.35 million new Facebook users in Egypt from 4.3 million on November 15, 2010 to 5.65 million as of March 1, 2011.

If anything, the survey suggests that it is the increased penetration of conventional media and technology, in particular mobile phones, and Pan

Arab satellite TV, this is having a greater effect than cutting-edge social media technologies.

Fully 80 per cent of young Arabs now log on to the Internet daily, up from 56 per cent a year ago. Perhaps surprisingly, when it comes to access, the information gap between the richer Gulf states and other Arab countries is far narrower than might be expected: 81 per cent of Gulf Arabs use the Internet daily, against 79 per cent from less wealthy countries. Egypt trails the field, with just over two-thirds using the Internet on a daily basis- clearly a reflection of the low internet penetration rates.

Social networking has surged in popularity, and now only trails listening to music as the most popular Internet pastime, while reading blogs is also increasingly popular, with 18 per cent of respondents regularly reading blogs, an almost four-fold increase from a year ago. Online shopping, however, shows a marked decrease: just 10 per cent of Arab youth make purchases online, down from 22 per cent a year ago.

Social networking is most popular in Iraq and Egypt, and is generally much higher in non-GCC countries. In Egypt, this supports the widespread use of social media during the protests. With more social networking sites permitting access in Arabic, it is expected that this trend will continue.

Television the most popular and trusted source of news

"Respondents were very clear about whom they trusted when it came to news, with television the clear winner. More than 60 per cent of respondents said news channels were the most trustworthy, with newspapers at 19 per cent and a lowly 11 per cent of respondents saying they trusted news they read on the Internet."

While youth in the Middle East are largely aware of news and current affairs, the survey suggests that keeping up with current affairs is far from a pressing priority. Only two in five update themselves on news daily, which is considerably less than last year. It can be assumed that the recent unrest has altered these figures dramatically, but it also needs to be ascertained how we define "news" in the social media world.

It is unclear whether reading a Twitter feed, for example, would be considered as a news update by the respondents, who may be referring to updates purely from mainstream news websites,

Around half of the youth living in the GCC update themselves on news daily or nearly every day, compared to just under a third in non-GCC countries – a figure that could relate to the relatively higher penetration of Internet and even satellite news channels in the Gulf countries.

Youth in Qatar and Kuwait are the most likely to be keeping up with news daily or nearly every day, while prior to the protests, almost half of Egyptians were updating themselves daily or nearly every day.

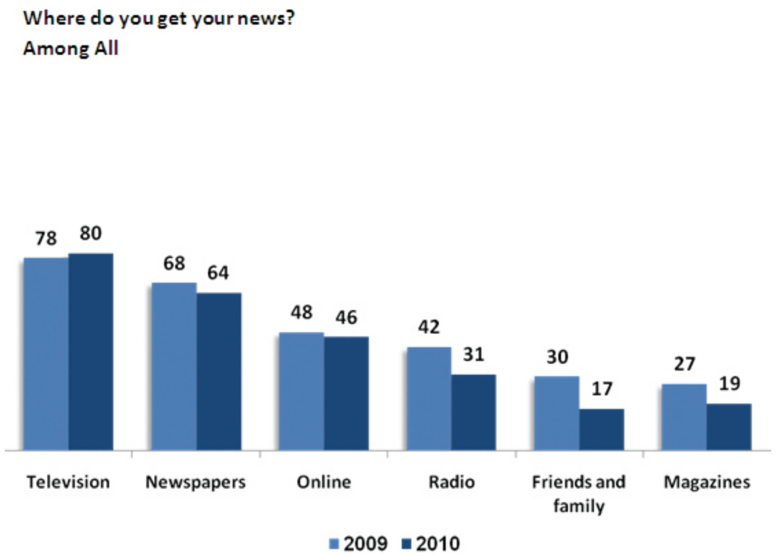
Television and newspapers remain the most important news sources: again, it is hard to ascertain how respondents are categorising news updates through social media sites, rather than the websites of the mainstream press. Given the attention paid to Facebook and Twitter and their purported role in organising and informing the protestors in Egypt and Tunisia, it seems contradictory that only 46 per cent of respondents said they relied on the Internet for news updates – especially given that in 2008, the majority of those surveyed said that they get their news online.

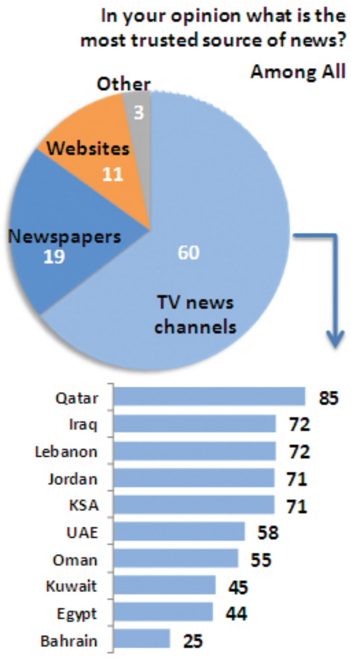
Regardless, respondents were very clear about whom they trusted when it came to news, with television the clear winner. More than 60 per cent of respondents said news channels were the most trustworthy, with newspapers at 19 per cent and a lowly 11 per cent of respondents saying they trusted news they read on the Internet.

In Qatar, home to Al Jazeera news channel, 85 per cent of respondents skewed towards television, while only a quarter of Bahrainis thought TV news was trustworthy.

Outside of the Gulf, magazines struggle to have any relevance at all for young people, with just 6 per cent citing them as a source for news, against 26 per cent in the Gulf.

TECHNOLOGY AND INTERNET





Traditional values are paramount, while parents grow in influence

Western observers who see Arab youth as being a subset of Western youth need to think again; while youth the world over share similar values and pastimes, a striking statistic from the survey is that traditional values and their preservation for future generations is of great importance to youth across the region. Religion, too, defines their lives very strongly.

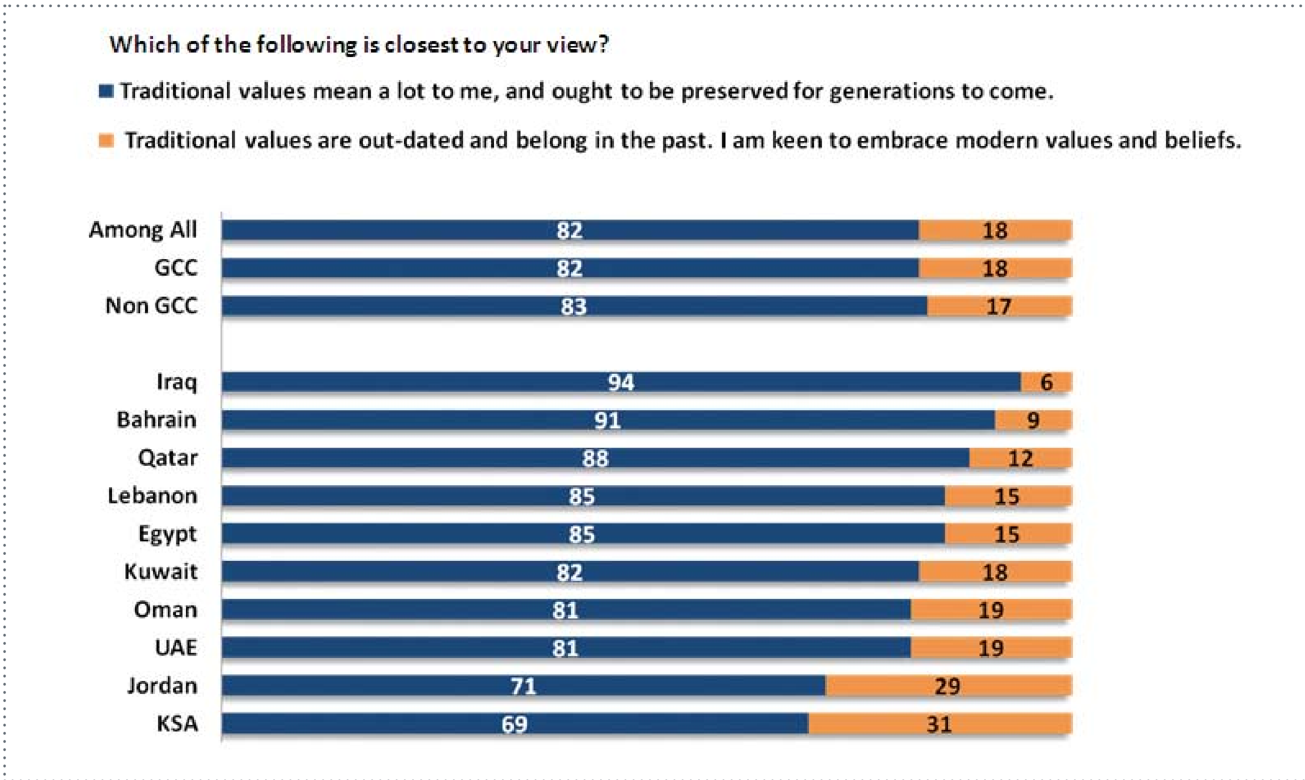
At the same time, Arab youth registered growing concern over the rise of Islamic movements and their role in political life in the region. Concern about the role of Islam in politics is particularly acute in non-Gulf countries – the very nations where democracy is becoming a reality.

In total, 82 per cent of all youth say that "traditional values means a lot to me, and ought to be preserved for generations to come."

Iraqi youth (94 per cent) agree most strongly with this sentiment, followed by Bahraini youth (91 per cent) and Qatari youth (88 per cent).

Perhaps in a backlash to the extremely restrictive society in which they live, Saudi youth are least likely to agree with this sentiment, with only 69 per cent saying that traditional values are paramount.

VALUES AND INFLUENCE



When it comes to drawing influences, families are the most important, with pop culture figures and politicians way down the list.

Among all those surveyed, parents are identified as having the greatest influence on how youth see themselves and their outlook on life, cited by 83 per cent of youth, up from 64 per cent in 2009. Family (72 per cent), religion (68 per cent) and friends (59 per cent) all also have increasing influence on Arab youth.

Pop stars, at 25 per cent, community leaders, at 27 per cent, and political figures, at 28 per cent, are seen as the least significant influences among Arab youth.

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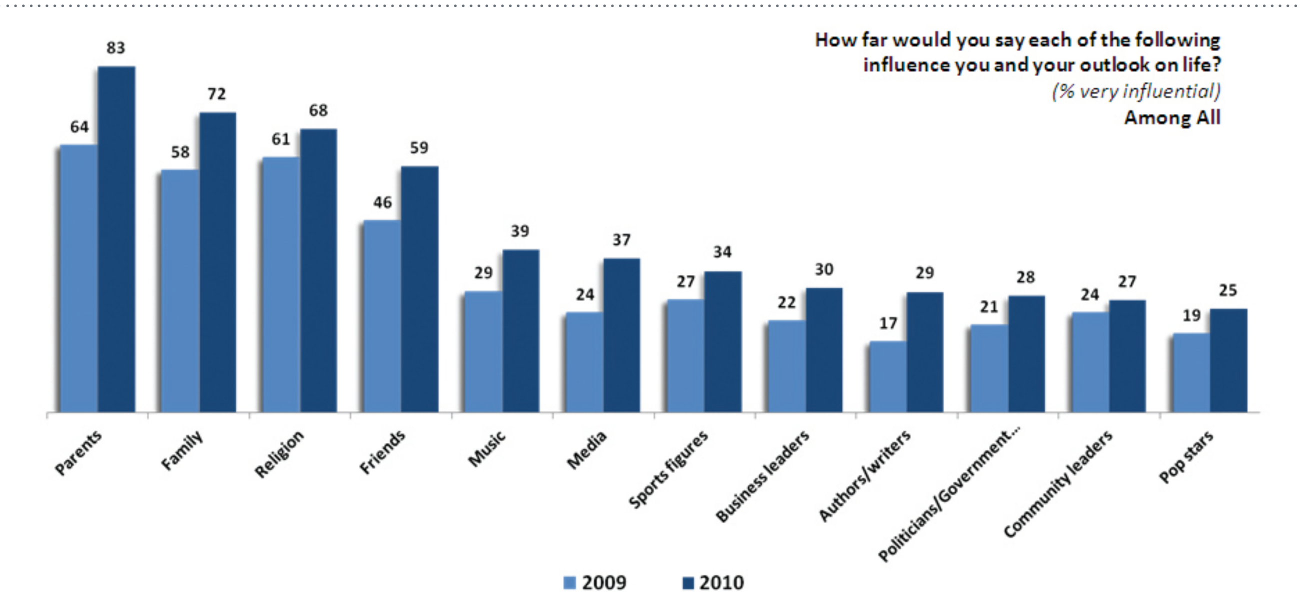
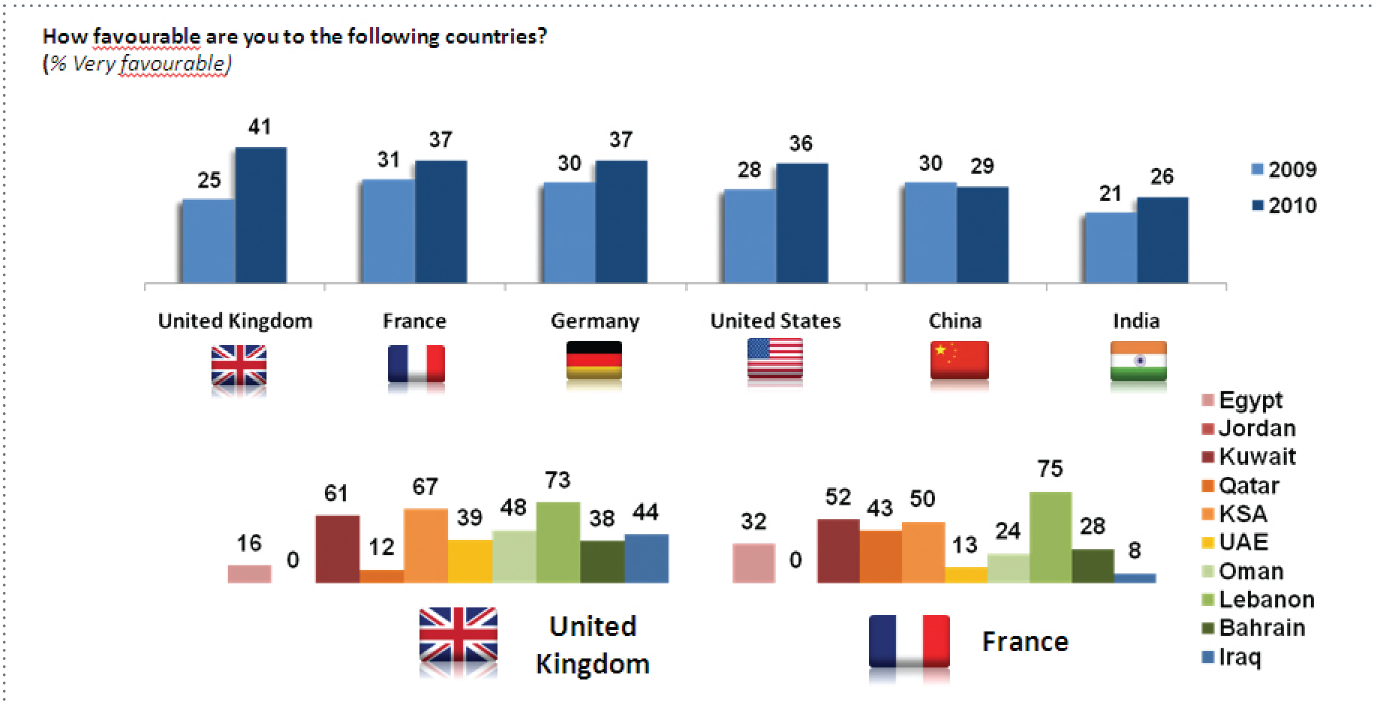
VALUES AND INFLUENCE



FOREIGN RELATIONS



Increase in positive perception of global powers, growing sense of global citizenship

While outside powers have long been accused of interfering in Arab affairs, the recent developments in the Middle East are notable for being almost entirely homegrown. As such, it is unlikely that youth perceptions of the West, or other nations, will be significantly altered by the unrest. Indeed, the lack of interference we have seen to date may even go some way to restoring some battered reputations.

Young Arabs have increasingly favourable views of the major global powers – although the views of specific nations sometimes diverge significantly. Regional youth have the most favourable views of the UK, with 41 per cent of Arab youth saying they view the country "very favourably," up from just 25 per cent in 2009.

Lebanese youth have the most favourable view of the UK, with 41 per cent of them saying the view the country "very favourably," compared to very low favourability rankings of the UK among Jordanian and Qatari youth. France, Germany and the US are also viewed positively, with between 36-37 of respondents saying they view these countries "very favourably."

Both China and India are viewed somewhat less positively, with 29 per cent viewing China "very favourably" and 26 per cent viewing India "very favourably."

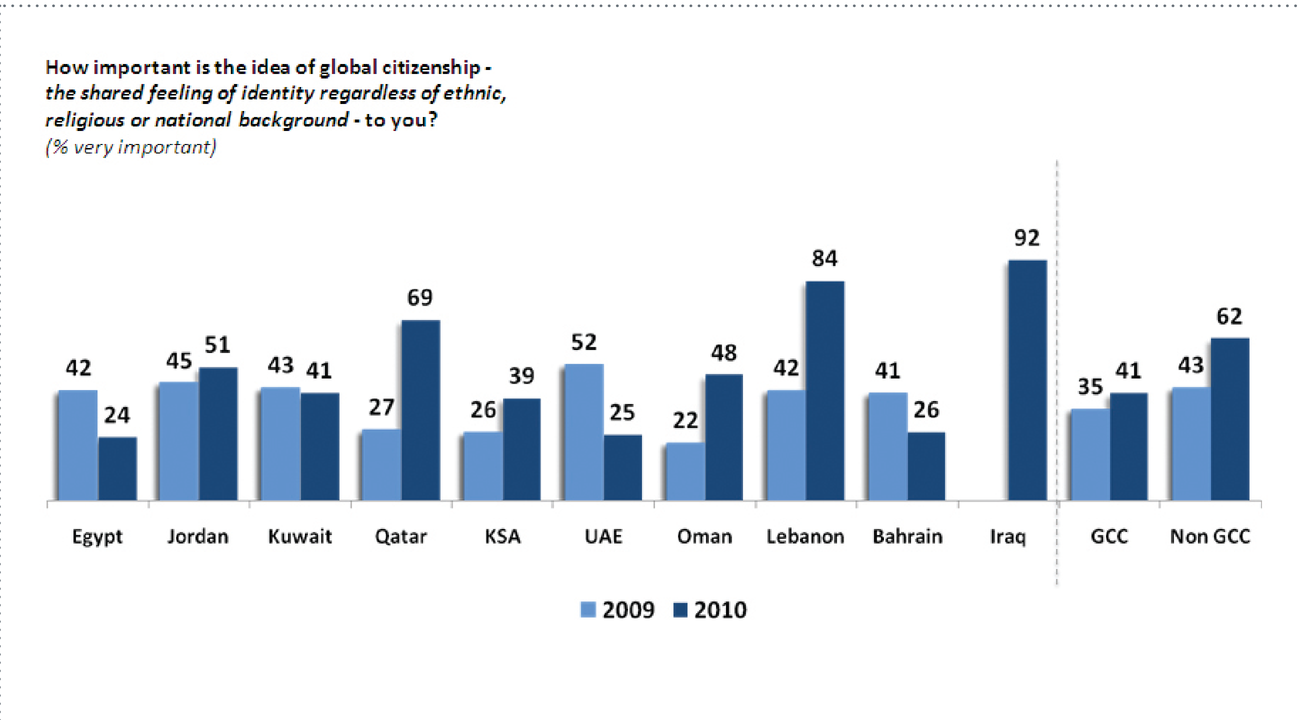
“Favourability towards all foreign countries surveyed is generally higher among GCC youth than non-GCC youth: 44 per cent of GCC youth view Germany “very favourably,” compared to just 25 per cent of non-GCC youth, while China and India are viewed much more favourably by GCC than non-GCC youth. The US and France, however, are viewed somewhat more favourably by non-GCC youth than by their peers in the GCC.”

Favourability towards all foreign countries surveyed is generally higher among GCC youth than non-GCC youth: 44 per cent of GCC youth view Germany “very favourably,” compared to just 25 per cent of non-GCC youth, while China and India are viewed much more favourably by GCC than non-GCC youth. The US and France, however, are viewed somewhat more favourably by non-GCC youth than by their peers in the GCC.

The concept of global citizenship – the shared feeling of identity regardless of ethnic, religious or national background – is increasingly important for many youth in the region, particularly in Lebanon, Qatar, Oman and Iraq, where more than nine in ten young people considered it very important. The UAE, Bahrain and Egypt place less importance on the notion in comparison to last year. In general, non-GCC countries are more committed to the idea of global citizenship, though this is somewhat driven by the overwhelming positive response from Iraq.

Global citizenship is less important in Bahrain and Saudi Arabia, with just under half of young people in Bahrain considering the idea to be important – the lowest number in the region.

GLOBAL CITIZENSHIP



Survey Update

New insights show support for democracy balanced by desire for stability

"When asked to name their single greatest priority, regional youth felt even more strongly about the importance of living in a democratic country, with 92 per cent of respondents citing this as very important, up from 77 per cent in January 2011."

Following the unrest in the Middle East in January 2011 that saw decades-old regimes in Egypt and Tunisia swept away, Penn Schoen Berland (PSB) conducted an additional 500 interviews in Egypt, Jordan, Lebanon, Bahrain and Iraq to gauge how the attitudes of Arab youth had changed as a result of such tumultuous events.

The fieldwork was conducted between February 26-March 5, 2011, in the capital cities of these countries, and interviews were conducted among Arab national youth aged 18-24.

On the whole, the results revealed acceleration in the trends and trajectories first pinpointed in our inaugural survey three years ago.

When asked to name their single greatest priority, regional youth felt even more strongly about the importance of living in a democratic country, with 92 per cent of respondents citing this as very important, up from 77 per cent in January 2011.

MOST IMPORTANT

How important are each of the following to you?	Egypt	Jordan	Lebanon	Bahrain	Iraq
Living in a democratic country	92	90	100	89	89
Domestic Stability	89	100	100	88	100
Having access to the best universities	55	85	70	47	74
Being paid a fair wage	86	69	75	57	70
Being able to get married and start a family	84	89	82	53	79
Having access to reliable healthcare	95	86	81	48	61
Owning my own home	83	96	82	58	68
Living in a safe neighbourhood	78	65	65	55	59
Having access to high speed internet	55	86	75	55	70
Living without fear of terrorism	81	89	80	53	76
Being able to find a job	86	84	83	65	61
Maintaining a close relationship with my family	84	90	95	55	69
Having the opportunities to excel in my career	71	85	86	47	75
Being able to afford luxuries	39	70	69	48	74
Having good infrastructure like electricity, clean water, safe roads	79	68	54	42	70
Ensuring equal rights/opportunities for women	80	87	73	52	73
Readily available credit from banks to start a business	68	90	90	38	71
Opportunities to emigrate	62	79	88	33	72
Preserving traditional values	52	72	49	55	60
Being able to travel and go on holidays when I want	37	66	47	35	62

Denotes biggest increase from Jan. 2011

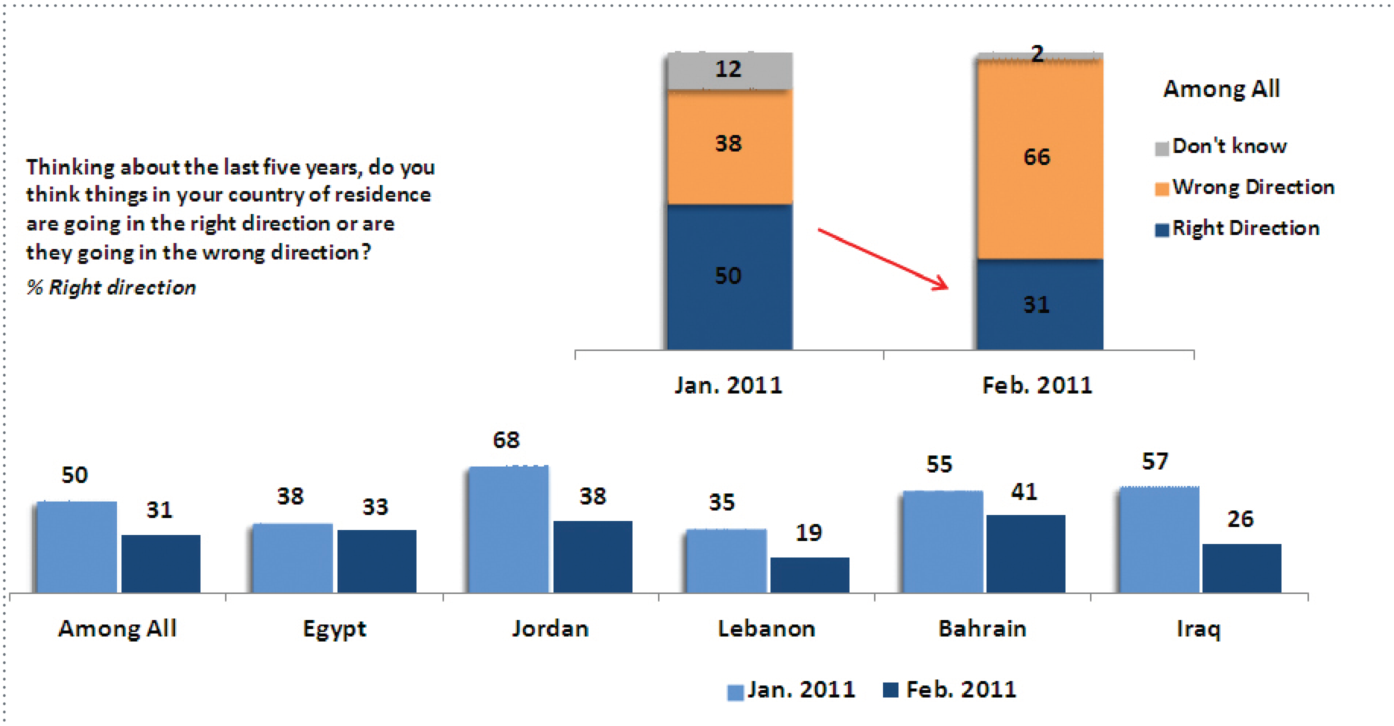
Note: Low bases, data is directional

At the same time, however, the majority want to see stability in their countries: domestic stability is very important to 89 per cent of respondents, while the number of those citing living without fear of terrorism as important has increased from 58 per cent to 77 per cent.

The cost of living, cited as the single biggest concern before the protests, is now even more of a source of anxiety: 79 per cent of respondents said they were very concerned about the rising cost of living, up from 62 per cent before the protests.

Concern over the lack of political franchise, an issue that ties in with the desire for democracy, doubled, with 54 per cent of respondents citing it a major concern, compared to just 26 per cent before the protests. Mirroring that,

COUNTRY'S DIRECTION



concern about domestic instability and unrest is also very high on the agenda of 72 per cent of respondents.

Youth are increasingly frustrated about corruption: at 61 per cent, more than twice as many respondents viewed corruption in government and public life as a major concern compared with 30 per cent before the protests.

One of the biggest changes between views pre- and post-protest is in young people's attitudes towards their home countries' future direction. Fully two-thirds of youth now say that their country of residence is on the wrong track, compared to 38 per cent before the protests. Just 31 per cent of youth now feel their country is moving in the right direction, compared to half in January 2011

> "Perhaps unsurprisingly, one of the greatest shifts witnessed in the post-protest findings is an increased interest in politics. Young people in the region are now much more liberal in their political views."

Disillusionment with the status quo is particularly acute in Lebanon and Iraq, where only 19 per cent and 26 per cent respectively think that their country is moving in the right direction. There are signs of optimism, though: Egyptian youth are the most optimistic about the long-term direction of their country, with 51 per cent agreeing that things will eventually get better, and only 12 per cent now believing the country is going in the wrong direction.

Support for the protests is uniformly high across all countries: 75 per cent of all respondents believe that the protests will have a positive impact on the lives of the people in their country. In total, 81 per cent of respondents supported the protests in Egypt, including an overwhelming 94 per cent of Egyptian youth.

Some nations are a little more inward-looking the others, however. While 90 per cent of Bahraini youth support the protests in their own country, just 66 per cent of Bahraini youth backed the Egyptian protests, and only half support the protests in Yemen.

Half of all respondents believe that the protests represent the views of the citizens of their countries, and the vast majority of respondents believe that the protests were spurred by a desire for greater democracy.

Perhaps unsurprisingly, one of the greatest shifts witnessed in the post-protest findings is an increased interest in politics. Young people in the region are now much more liberal in their political views, and are somewhat less attached to traditional values: half of regional youth now say they are politically liberal, up from a fifth before the protests. Youth in Lebanon are most inclined to describe themselves as liberal, at 72 per cent, followed by young people in Iraq and Jordan at 67 per cent.

Egyptian youth are much more liberal than they were in January 2011, when only 3 per cent said they were liberal – but are still, at 26 per cent, the least liberal in the region. Youth in Bahrain are likewise much more liberal than they were in January 2011, when only 10 per cent said they were liberal – but are, at 27 per cent, the second-least liberal in the region

The resilience of traditional values was one of the notable points gleaned from the 2010 ASDA'A Burson-Marsteller Arab Youth Survey. While traditional values endure, fewer now say they mean a lot to them ,however, with 71 per cent of respondents agreeing with this sentiment, down from 82 per cent just weeks before.

The greatest shifts away from tradition have been seen in Iraq, where 58 per cent now agree that traditional values are important, down from 94 per cent in January 2011, and Lebanon, down from 85 per cent to 48 per cent.

About ASDA'A Burson-Marsteller:

ASDA'A Burson-Marsteller, part of the MENACOM Group, is the region's leading public relations consultancy, with over 130 communications professionals in 11 fully-owned offices across the Middle East and North Africa. The firm has an additional eight affiliates covering a total of 17 countries in the Middle East region. The agency provides consultancy services to governments, multinational businesses and regional corporate clients through its six practices in the sectors of Technology, Corporate, Finance, Healthcare, Consumer Marketing and Public Affairs. Its services include reputation management, media training, crisis & issues management, digital communications, media relations, media monitoring and analysis and event management. For more information, please visit: www.asdaa.com.

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Burson-Marsteller, established in 1953, is a leading global public relations and communications firm. It provides clients with strategic thinking and program execution across a full range of public relations, public affairs, reputation and crisis management, advertising and web-related strategies. The firm's seamless worldwide network consists of 67 offices and 71 affiliate offices, together operating in 98 countries across six continents. Burson-Marsteller is a part of Young & Rubicam Brands, a subsidiary of WPP (NASDAQ: WPPGY), one of the world's leading communications services networks. For more information, please visit: www.burson-marsteller.com.

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The MENACOM (Middle East and North Africa Communications) Group, part of WPP and Y&R Brands, with headquarters in Dubai, is the Middle East and North Africa region>s leading communications conglomerate. The group includes advertising agencies Young & Rubicam, Intermarkets and Partnership; public relations firm ASDA'A Burson-Marsteller; direct marketing specialists Wunderman; media specialist firm Mediaedge; and interactive firm Tattoo. With over 1,200 employees in its network of over 50 offices, the MENACOM Group provides marketing communications services in 17 countries across the Middle East, Levant and North Africa.

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Pictures from the launch event of the Arab Youth Survey **2008**

Pictures from the launch event of the Arab Youth Survey **2009**

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